TRAKAWEB VERSION 4
USER GUIDE

UD0260

06/01/26

VERSION 2.3

CONTENTS

1. WELCOME

Welcome to the TrakaWEB User Guide. This guide has been prepared in order to assist you with every aspect of TrakaWEB ranging from logging in, to adding users and running reports.

The guide will assist you with the use of TrakaWEB in conjunction with both Traka Touch Key Cabinets and Traka Touch Locker Systems.

The content of this user guide was documented against the following software versions:

- **TrakaWEB V4.4.20**
- **Traka Touch V4.1.0**
- **Integration Engine - For information regarding the latest version, please refer to the relevant Integration documentation**

NOTE: Please refer to the Traka support site for the latest compatibility information of TrakaWEB and Traka Touch products.

https://support.traka.com

GDPR COMPLIANCE INFORMATION

Traka supplies Key Cabinets and intelligent Locker systems. These products keep keys & assets safe from unauthorised access and allow only authorised users to remove and return the keys/assets they are entitled to. Traka systems give full accountability of who has (or had) which keys/assets and at what time and date.

This is usually managed by software that runs on either the Traka product and/or the client's computer network. To achieve all this, the Traka products hold personal information in order to identify individual users as well as the keys/assets. Examples of this are the storage in the Traka products of names, email address, PIN/credential IDs and other detailed personal information required by a Data Controller (any organisation using the Traka systems).

Please be aware that under General Data Protection Regulations (GDPR) any Data Controller "shall be responsible for, and be able to demonstrate, compliance with the principles of GDPR". With regards to the personal data held on Traka products, the company or organisation that owns and operates the Traka system is the Data Controller as they are responsible for obtaining that data and for determining the purpose and legal grounds for which it is to be used.

Traka are happy to confirm that its products have the functionality & protection in place for an organisation to meet GDPR obligations including the fulfilment of the following rights to individuals (please note that to fulfil these requirements a process of using the software reporting process and/or exporting screen shots will be required):

- to be informed how their personal data is being used
- to access the personal data that is being held
- to rectify if any of their personal data is inaccurate or incomplete
- to erase and delete personal data
- to restrict processing of their personal data
- to obtain a copy of their personal data
- to object to their personal data being processed

On this basis, operators of Traka systems are reminded that they must take into account their obligations and responsibilities under GDPR when carrying out the following:

- Determining what personal data is to be held within the system and the legal grounds for doing so
- Obtaining the personal data from individuals and inputting it to the system
- Determining the appropriate access controls for the system and the data held on it
- Defining who is able to process the personal data and putting in place the appropriate Data Processor Agreements
- Understanding the requirements for, and implications of, sharing the personal data with other systems that are integrated to the Traka system
- Removing/deleting/erasing personal data from the system (including any backup copies) and dealing with Subject Access Request or Data Breaches

For more information about GDPR in relation to Traka products and systems, please contact GDPR@traka.com

INTRODUCING TRAKA

About Traka

Traka is the global leader in intelligent management solutions for keys and equipment. Our solutions help all types of organizations better control their important assets, improving productivity and accountability, and reducing risk in critical processes.

We continuously invest in the development of our technology to provide leading, innovative, secure and effective real-world solutions to the challenges that organizations face in managing keys and equipment, which have such a high impact on the way their organization is run. Our solutions are tailored to customer needs and requirements, providing the most value and impact on their business.

Traka is a global organization with local support, working to defined processes so that we are local when you need us and global when it counts.

Traka is part of ASSA ABLOY Global Solutions, dedicated to reimagining how people move through their world. Our expertise in customer journey mapping, innovation and service design leads to the invention of new security solutions that create value for our clients and exceptional experiences for end users

Project Management

Project Management begins from the moment that you decide to place your order with Traka. Our specialist Customer Account Managers work behind the scenes with our sales team to ensure a seamless handover.

Customer Support

Customer satisfaction is our top priority – at Traka we pride ourselves on building long term partnerships from the initial hardware installation, through the system software configuration and user training and finally in providing on-going customer support via our global help desks.

Maintenance Contracts

In the unlikely event that you do experience a problem with your Traka system, our dedicated customer support service, located in UK, US, EMEA and Oceania, operate a fast and efficient telephone service to assist you quickly in resolving any problems.

Training

Our training department provides a comprehensive range of courses to enhance your knowledge and skills with the aim that the courses give you the best qualifications for long-term success in an environment a dynamic as the asset management industry.

2. TRAKA CONTACT DETAILS

Sales Website	www.traka.com
Sales Enquiries Email	sales@traka.com
Support Website	support.traka.com

Traka UK

Main Tel:	**+44 (0)1234 712345**
Support Tel:	**+44 (0)333 3553641**
Contact Email:	info@traka.com

Traka Europe

Main Tel:	**+44 (0)1234 712345**
Support Tel:	**+44 (0)1234 943900**
Contact Email	eusupport@traka.com

Traka Nordics

Main Tel:	**08 775 1090**
Support Tel:	**08 775 1099**
Contact Email:	nordicinfo@traka.com

Traka Iberia

Main Tel:	**+34 91 8676696**
Contact Email:	info@traka.es

Traka USA

Main Tel:	**+1 877 34 87252**
Support Tel:	**+1 855 94 87252**
Contact Email:	info@trakaUSA.com

Traka Africa

Main Tel:	**+27 11 761 5000**
Contact Email:	info@traka.co.za

Traka Oceania

Main Tel:	**+61 1300 666 108**
Contact Email:	enquiries@traka.com.au

3. TRAKAWEB

3.1 PREREQUISITES

Before attempting to use TrakaWEB, please ensure you have read and completed the most recent versions of the following user guides:

- **TD0013 - TrakaWEB Installation & Configuration Guide / TD0216 – TrakaWEB Version 4 Installation & Configuration Guide**
- **UD0011 - Traka Touch User Guide (for Key Cabinets)**
- **UD0258 - Traka Touch Pro User Guide (for Key Cabinets)**
- **UD0090 - Traka Touch Locker User Guide (for Locker Systems)**

What is TrakaWEB?

TrakaWEB is a web-based administration suite for centrally managing Traka Touch systems. Developed to support any organisation or industry managing an unlimited number of items.

Prerequisites for TrakaWEB

The following Server specifications are recommended:

- **Windows Server 2025 with IIS10**
  (3GHz Xeon, 8GB RAM, 500 GB HD)
- **Windows Server 2022 with IIS10**
  (3GHz Xeon, 8GB RAM, 500 GB HD)
- **Windows Server 2019 with IIS10**
  (3GHz Xeon, 8GB RAM, 500 GB HD)
- **Windows 11 (Professional or Enterprise editions) with IIS10**
  (3GHz i3, 8GB RAM, 500 GB HD)
- **Windows 10 (Professional or Enterprise editions) with IIS10**
  (3GHz i3, 8GB RAM, 500 GB HD)
- **64-bit support**
- **Physical or Virtual machine support**

The following Databases are supported:

- **SQL Server 2022 Express/Standard/Enterprise**
- **SQL Server 2019 Express/Standard/Enterprise**
- **SQL Server 2017 Express/Standard/Enterprise**
- **Azure SQL**

SQL Server may be configured to 'Mixed Mode Authentication' or 'Windows Authentication'.

The following Client Browsers are supported:

- **Google Chrome** (latest version recommended)
- **Mozilla Firefox** (latest version recommended)
- **Safari** (for Mac only - latest version recommended)
- **Microsoft Edge** (latest version recommended)

3.2 CAUTION

Great care has been taken to ensure that the Traka hardware and software works correctly but it is impossible to guarantee that there are no errors in a computer program or that hardware failures will not occur. Remember also that if someone enters the wrong information errors may also occur and careless use of the hardware can cause damage that no design can withstand.

Only you can check that the system works properly in your particular application both initially and on a regular basis.

We would ask you to consider how you would operate your business should you be unable to access the keys due to a hardware or software failure. We would also recommend you implement some contingency plan to cover such an occurrence.

For these reasons, Traka and their agents and distributors cannot assume liability or responsibility for any consequences under any circumstances arising from the use of the Traka equipment and programs. The product is sold only on the basis of this understanding. If this is not acceptable to you then please return the equipment and software prior to its use for commercial purposes for a complete refund.

If using devices such as mobile phones or tablets with TrakaWEB, please make sure to orientate the device in a landscape orientation to optimise the viewing and operation experience.

3.3 WARRANTY TERMS AND CONDITIONS

Traka UK Warranty and Annual Maintenance and Support Agreement

Traka systems are provided with a 12-month warranty, starting on the day of installation. During this warranty period Traka will provide parts and labour to repair any fault caused through manufacturing defect.

After the expiry of the warranty period, an annual maintenance and support agreement may be purchased, which covers the cost of parts and labour to repair on a planned next working day response any fault caused through normal use of the equipment. In addition, the maintenance and support contract includes an annual system check and free upgrades to the PC software. The annual charge for this will be 15% (subject to distance) of the list price of the equipment covered.

Items covered by the Warranty and Annual Support Agreement

Hardware

All parts provided by Traka during the original installation. Where card or other readers are supplied by the Customer, these parts are specifically excluded from the warranty and maintenance. Items purchased subsequent to the original installation will be subject to an adjustment to the annual support agreement.

Software

Traka will also provide free software upgrades as required during the period of the annual maintenance. Furthermore, Traka will provide a login to our technical support web site where information on the latest upgrades is available and where the latest software may be downloaded. Software upgrades are supplied on a self-install basis and requests for Traka to install the software are not included within the warranty or annual support agreement.

Response Times

Traka offer a 9:00 to 5:30 support facility and guarantee a same or next working day response to any reported fault. Where site visits are required, Traka will whenever possible attend on the next working day. Working days are Monday to Friday excluding Bank holidays.

Exclusions

Traka will not be responsible for any fault or damage or configuration change that occurs as a result of:

1. Inadequate user training
2. Software reconfiguration
3. Use of the software on a non-supported version of the Windows operating system
4. Customer re-installation on a different version of the operating system
5. Accidental damage
6. Vandalism, sabotage, or terrorism
7. Noncompliance with the Customers' responsibilities as detailed below

If a warranty or support visit is required to repair systems damaged as a result of these exclusions, Traka reserve the right to place a lower priority on the call and cannot guarantee the same response times to repair such failures.

If response to repair any fault or to reconfigure any settings is required due to these exclusions Traka will charge at their usual site visit rates.

If, as a result of the site visit, the system failure was subsequently found to be caused by these or other exclusions, Traka will charge for both parts and labour at the prevailing rates.

Use of the equipment and backing up the data

The Customers responsibilities are to:

1. Ensure that the Traka hardware and software is used in a proper manner by competent trained employees only and in accordance with the Traka User Guides.
2. Provide the Traka support engineer full access to the Traka system and TrakaWEB. This may include making available access keys and passwords.

3. Ensure that all Traka systems are connected to the TrakaWEB database and are regularly backed up.

4. Not alter or modify the hardware or software in any way whatsoever nor permit it to be combined with any other system without the prior written consent of Traka.

5. Not request, permit, or authorise anyone other than Traka to provide any maintenance services in respect of the hardware or software while the maintenance agreement is in effect and not subject to notice of termination.

6. Co-operate fully with Traka personnel in the diagnosis of any error or defect.

7. Ensure in the interests of health and safety that Traka personnel while on the Customer's premises for the purpose of this agreement are either at all times accompanied by a member of staff familiar with the premises and safety procedures or trained in respect of the site health and safety procedures.

Limitation of Liability

Traka shall not be liable for any direct, indirect, or consequential loss or damage howsoever caused, arising from this agreement, the software, the hardware, its use, application support or otherwise, except to the extent which it is unlawful to exclude such liability.

Database

Traka shall not be liable for any direct, indirect, or consequential corruption or loss of data arising from modification to the Traka database not conducted using the proper TrakaWEB tools provided. Any reparation to a Traka database required to be carried out by a Traka Engineer, where the database structure has been tampered with using other software programs (non-Traka software programs) such as Microsoft SQL Server will be charged for accordingly.

Virus

Traka warrants that it will use all reasonable endeavours to ensure that the software is supplied free of computer viruses and has undergone rigorous virus checking procedures prior to delivery in line within current best practices.

3.4 COPYRIGHT

3.5 CONTACT

Should you need assistance with your Traka products, please feel free to contact us by any of the means below. If however you purchased your Traka products through a distributor and you require assistance then please contact your distributor first.

Web Addresses

From our main website you can access our technical support website where you keep up to date with all the latest downloads and information.

Traka Website: **https://www.traka.com**

Email

If you have any questions regarding any aspect of Traka, please feel free to email us.

Enquiries: **info@traka.com**
Support: **support@traka.com**

Telephone and Fax

If you have any questions regarding any aspect of Traka, please feel free to call between the hours of 09:00 and 17:30 GMT/BST.

Telephone: **+44 (0)1234 712345**
Facsimile: **+44 (0)1234 713366**

Technical Support Helpline

Telephone: **0333 355 3641**

Postal Address

You can also write to us.

Address:

Traka

30 Stilebrook Road

Olney

Buckinghamshire

MK46 5EA

United Kingdom

4. GETTING STARTED

4.1 CHANGING THE LANGUAGE

TrakaWEB along with Traka Touch is multi-lingual and can display the whole web layout in various languages. These can be set on a per user basis so that when each user logs into TrakaWEB it will automatically change to the appropriate language. You can also change the language whilst browsing through TrakaWEB by clicking the small arrow button next to the language name, which will show a list of the currently supported languages. Simply select the desired language.

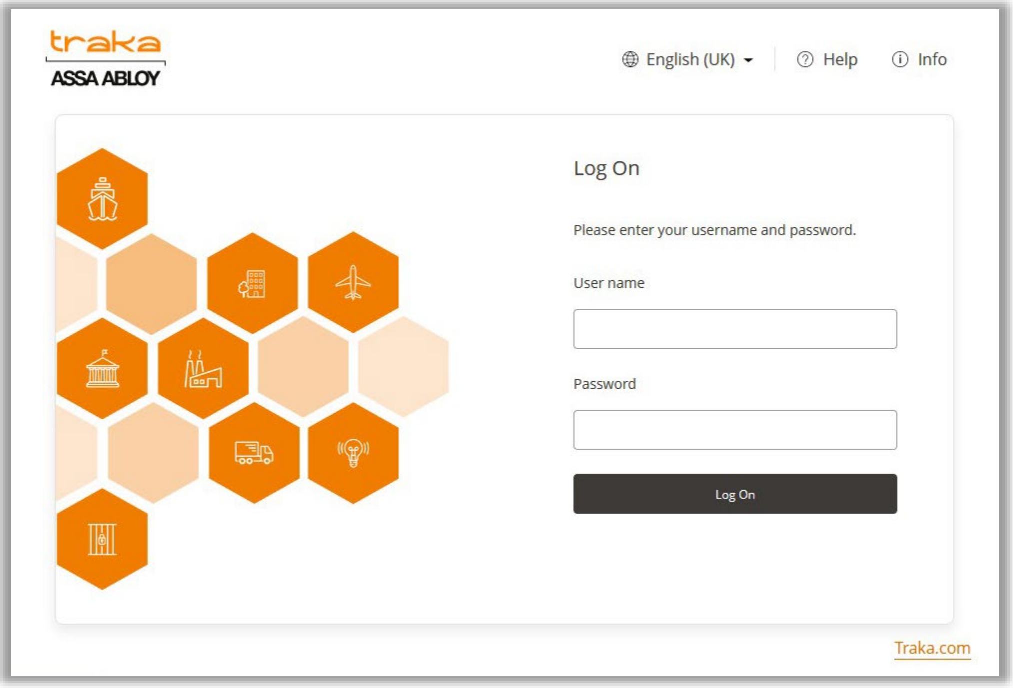
The page will then quickly refresh with the newly selected language.

NOTE: The language selector is always accessible from the top of the page regardless of where you are in TrakaWEB.

4.2 LOGGING INTO TRAKAWEB

Once you have completed the installation and commissioning of TrakaWEB, open a new window in your web browser and navigate to your TrakaWEB URL and you will be presented with the login screen.

NOTE: Please view the provided user guide - TD0216 – TrakaWEB Version 4 Installation & Configuration Guide for more information on your TrakaWEB URL.



Enter your username and password and select the **Log On** button.

NOTE: If the autofill options have not been disabled in your web browser, the Username and Password information will be visible when you next access the login screen. To prevent this information from being unintentionally saved or used, it is recommended that you disable the autofill options. For more information, please refer to the Disable & Clear Auto-Fill Information section.

4.3 NO MORE ACCESS LEVELS

Traditionally, Traka have used 'Access Levels' to define whether a user can remove an iFob/item from the system. Historically you would assign each item with an access level from 1-2560. The corresponding access level would then need to be allocated to the user. For example, if items 1-10 had an access level of 1, then any user needing to remove any of those items would also need access level 1 in their user details.

TrakaWEB does not use access levels; instead, you directly grant the user access to the item's position in the system, therefore giving them sufficient access. This bypasses the use for individual access levels. You can select which items the user can remove in the User Details grid under item access tab.

4.4 TRAKA TOUCH SYNCHRONISATION

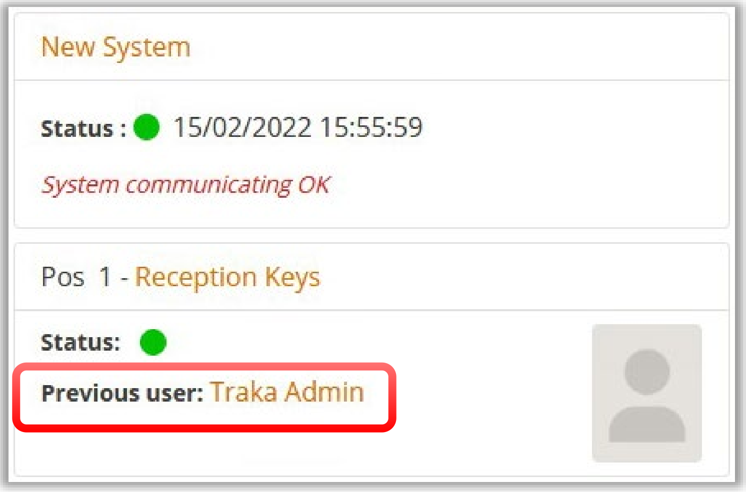
Once your system has been connected to TrakaWEB, all the items, users and general data from your Traka Touch system will automatically be synchronised when you log in. After the initial Sync, TrakaWEB will communicate with your system every 30 seconds to ensure all information is as up to date as possible.

The current status of your system is displayed in the detail panel on the System Viewer page.

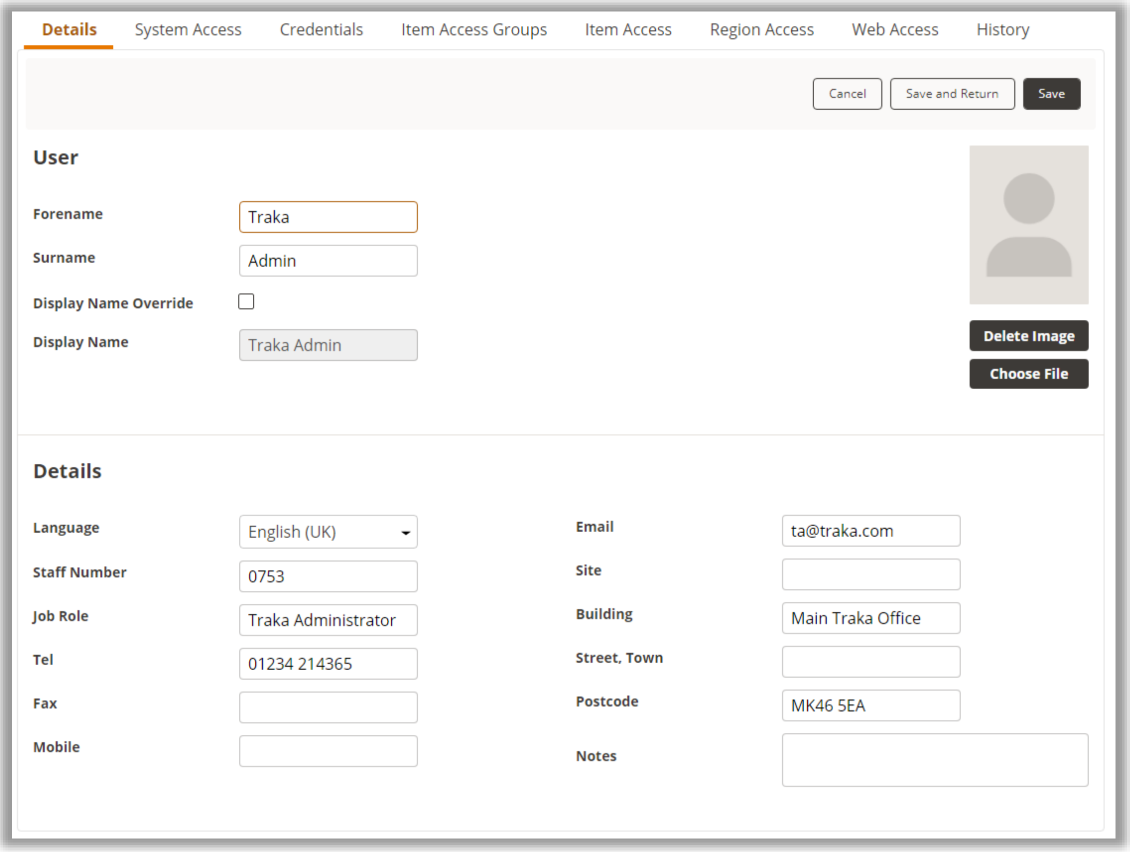
4.5 HYPERLINKS

Throughout TrakaWEB, there are areas of text that are highlighted orange called hyperlinks. These hyperlinks can be selected to take you from one page to another. This allows you to quickly navigate from one section to another without cycling through different menus or clicking the forward and backward buttons on your browser. An example of a hyperlink in TrakaWEB is shown below.

From the item panel on the System Viewer, click the 'previous user' name.



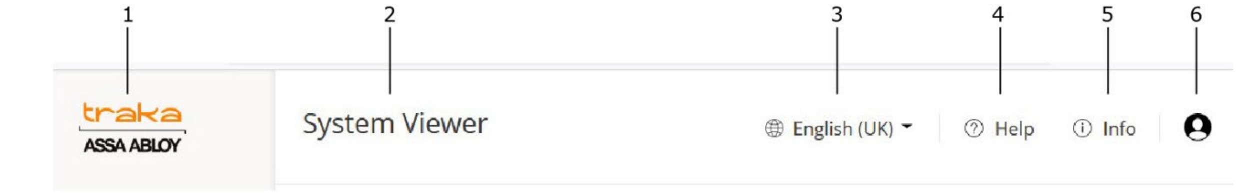
You will automatically be taken to the Edit User page, which holds all the information about the user.



4.6 TRAKAWEB INTERFACE

4.6.1 GENERAL INTERFACE

Each area of TrakaWEB displays different information and therefore varies in layout and style; however, a general interface is maintained consistently throughout TrakaWEB. Located at the top of each page is a black and orange banner which will display certain buttons and information that are used in every aspect of TrakaWEB.



1 - Home Button

When selected, the Home button will take you from the page you are currently viewing back to the system viewer page.

2 – Page Name

Each page of TrakaWEB will display the title of that page.

3 - Language Selector

Selecting this button will display a list of languages that TrakaWEB currently supports. Selecting one of those languages will automatically change all text on screen to the specified language. This can also be set on a per user basis, ensuring that all text will automatically change when the user logs into TrakaWEB/Traka Touch.

4 - Help Button

Selecting this button launches the built in TrakaWEB User Guide.

5 - Information Button

Clicking this will show a dialogue box that tells you what version of TrakaWEB you are using along with licencing information and support details such as telephone and email addresses.

6 - User Profile

Here, the currently logged in user’s name is displayed.

7 - Traka Website Link

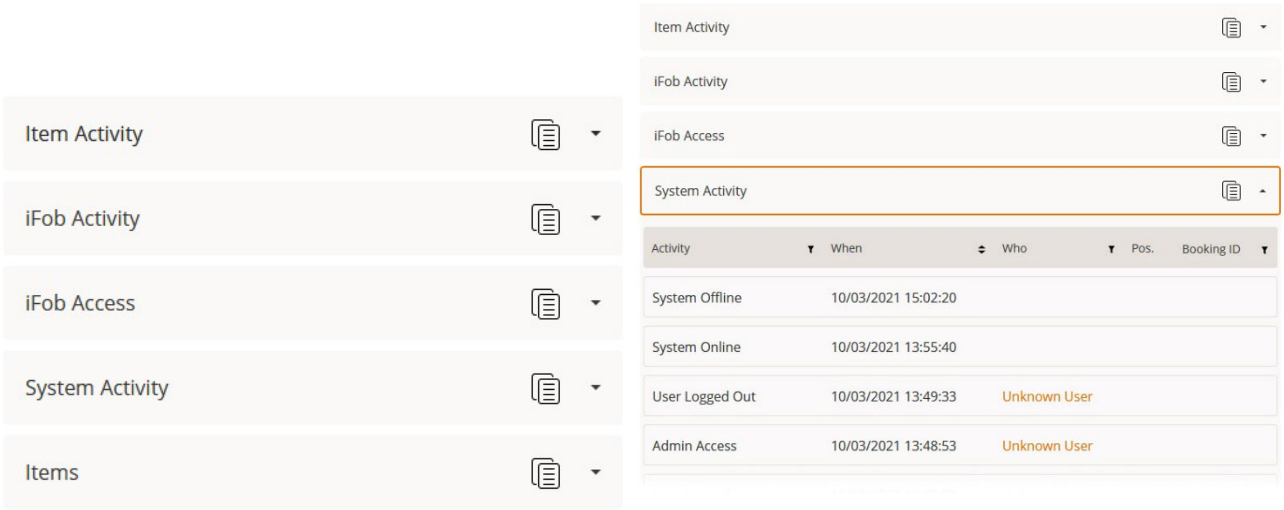
The traka.com Website Link is located at the bottom left of the screen. Clicking on the link will take you to the main Traka website.

4.6.2 GRIDS

Throughout TrakaWEB, there are various places that use grids to display important information. Each will vary slightly in what columns are displayed or what size they are. However, the navigation through each grid is the same.

Tabs & Columns

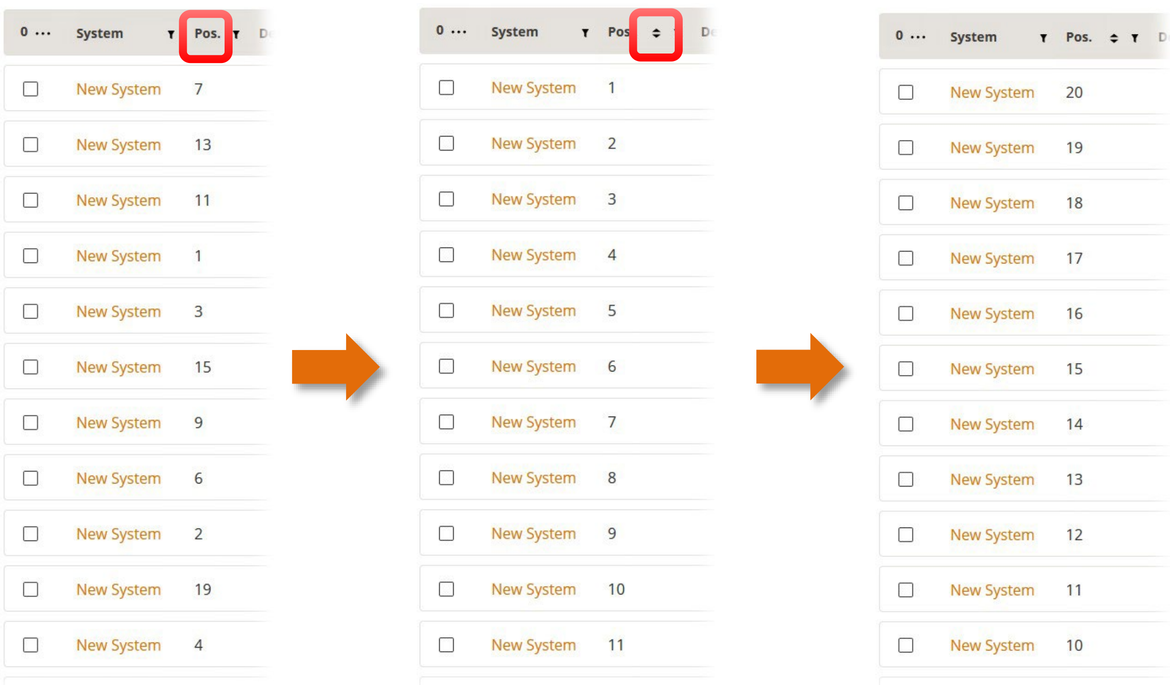
Each grid is made up of one or more columns and often has at least one tab. Selecting a tab will either navigate to another page or expand to display a column.



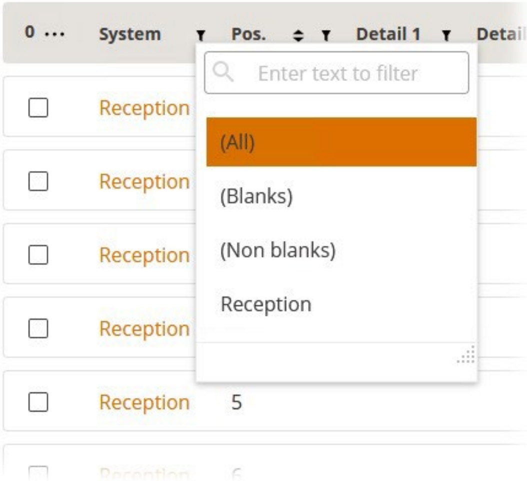
Some pages allow any combination of columns which can be saved and stored for later viewing. These are known as Layouts. Please refer to the Layouts Overview for more details.

Filtering Data

The information in each column of a grid can be sorted by ascending or descending order. To achieve this, simply click on the Sort button in the column header to toggle the information from random to ascending first. Click again to sort to descending first.



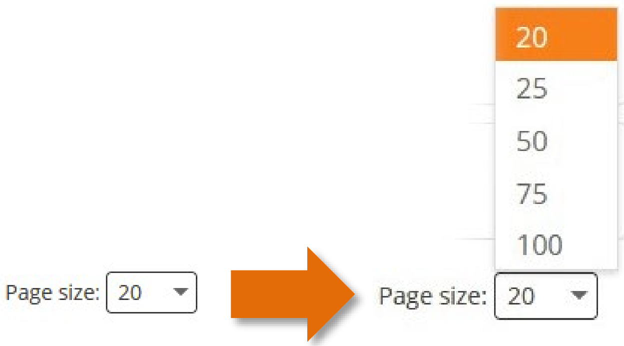
Often there is a Filter button next to the column name. This also offers different options for filtering information. In the example below, the system filter has been dropped down to show the names of all systems in the selected region. By default, the column always shows 'All' the system names. Clicking one of these names will automatically display that specific system. The option 'Blanks' will display any system without a name whereas; 'Non-Blanks' will show every system that has a name. Alternatively, you can search for a specific system by entering its name in the text box.



It is also possible to sort information on multiple columns. For example, clicking the position column will sort the position number ascending first i.e., 1, 2, 3 etc. Holding the shift key on your keyboard and selecting another column, e.g., system, will then sort the position number by the system name.

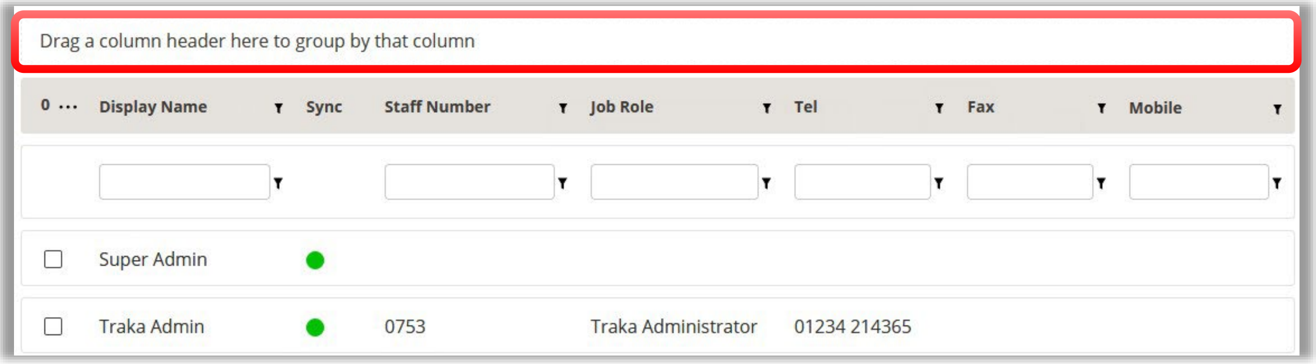
At the bottom of each grid is the page selector. You can click the number of the page you require or alternatively by clicking either of the < > buttons will move the page along one page at a time. To navigate to the very first or last page click, select either the first or last page number.

Often there is also the option to select how many lines of data you can view on each page. This is only applicable if you have many lines of data that cannot be shown together. Selecting the drop-down arrow from the Page Size form in the bottom right-hand corner will allow you to select how many lines of data will be displayed on each page.

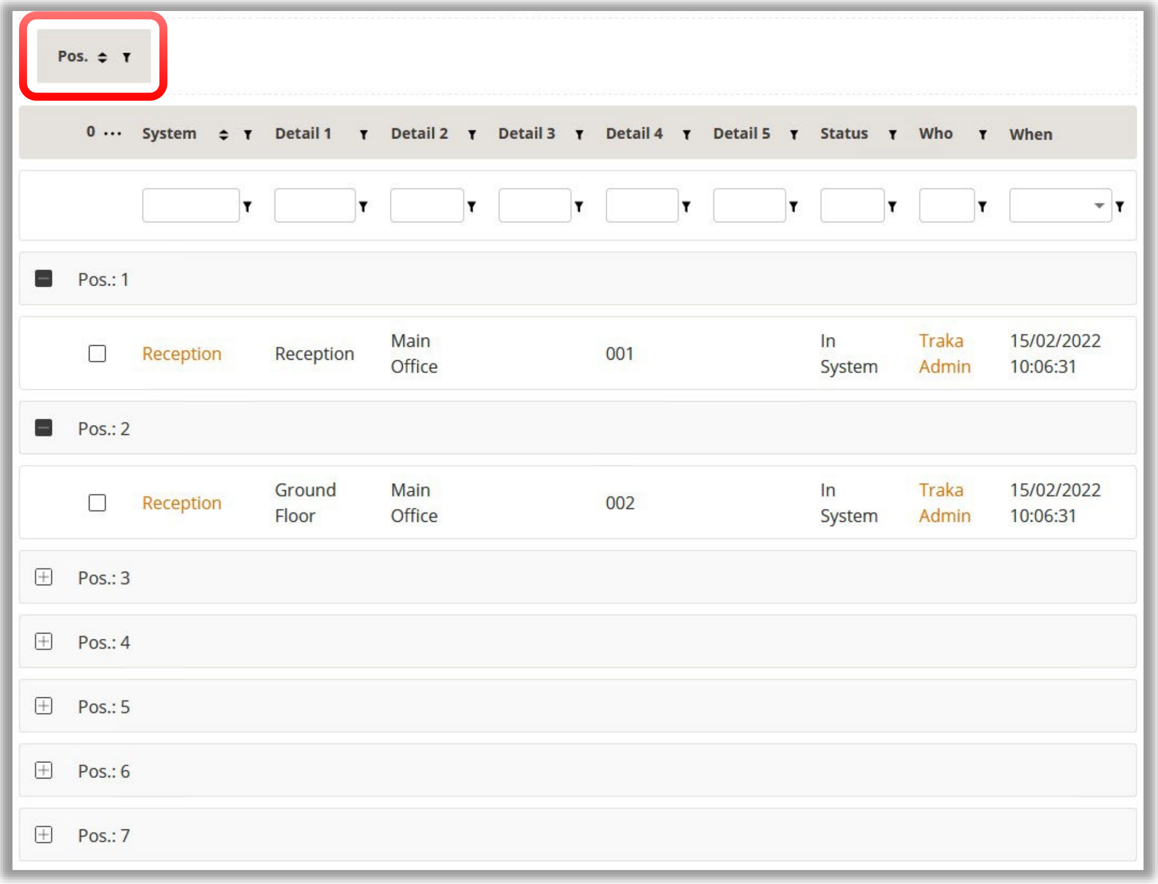


Grouping Information by Column

Most grids in TrakaWEB have the functionality to group information by the column. To tell if the grid you are viewing is able to group by columns, a 'grouping bar' can be made available by selecting the **Search for** feature. The 'grouping bar' will then appear above the column headers and will display the message 'Drag a column header here to group by that column'.



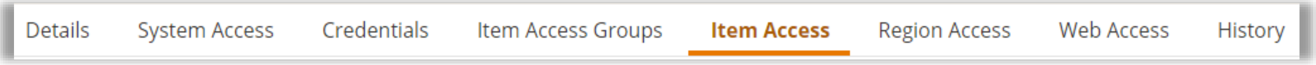
In the example below, the 'position' column has been added to the grouping bar. This allows you to view each position number individually. By expanding each line, you will see the details for that position number across all systems in the database. If you had three systems for example, you would see three separate lines with details on that position number in each of the three systems.



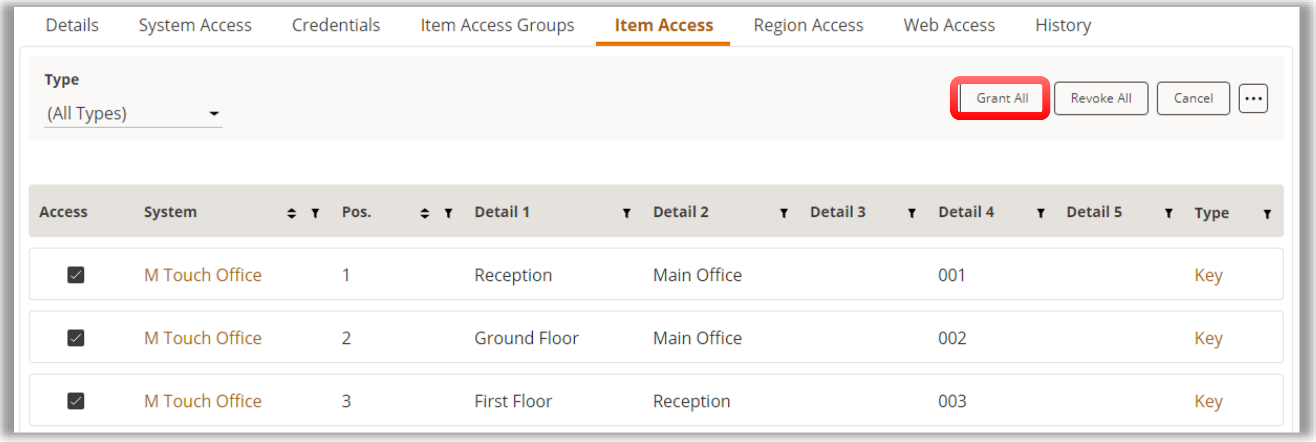
Grant All/Revoke All

The Grant All/Revoke All buttons are a quick way to allocate or deallocate access of all items to a user. They can be used in relation to Item Access Groups and Item Access.

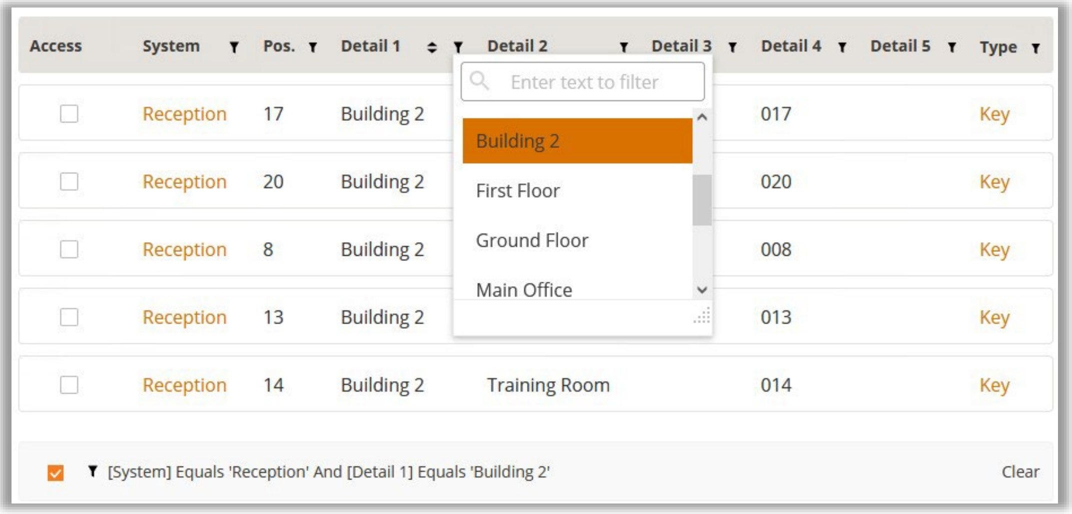
1. At the Edit User screen, click on the **Item Access** tab.



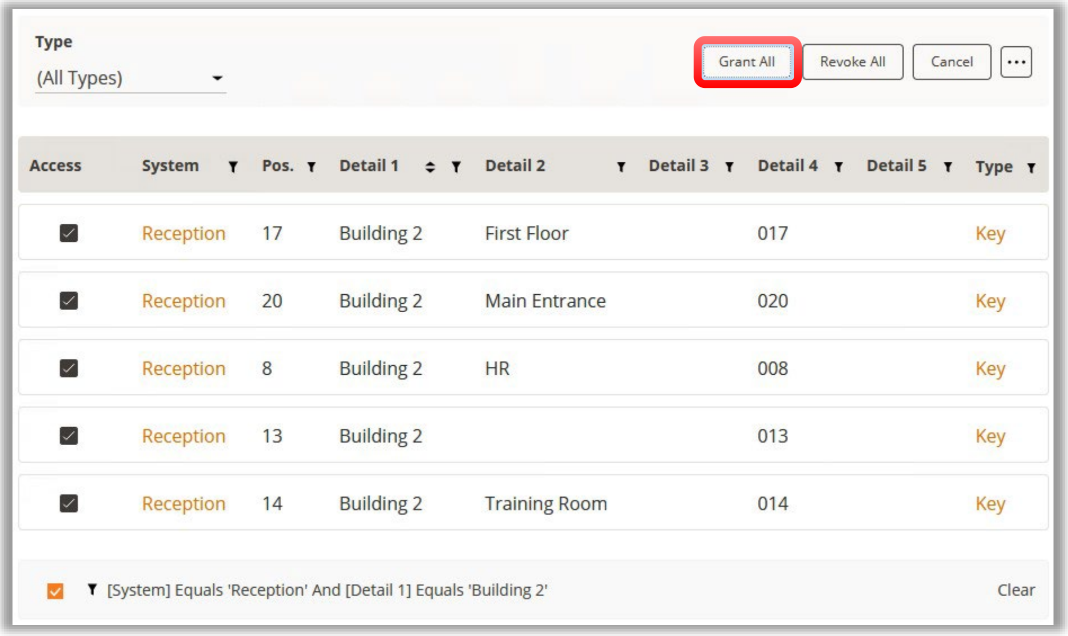
2. Clicking on the **Grant All** button will place a tick in every box in the Access Grid.



The same function can be applied to filtering the information in the grid.



Clicking on **Grant All** with a filter applied will only grant access to the items currently displayed in the grid.

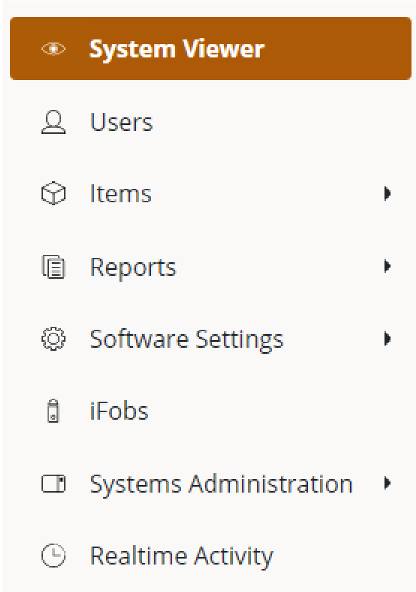


NOTE: A similar process can be applied when setting up Users and Items in Access Schedules by clicking on Select All or Remove All.

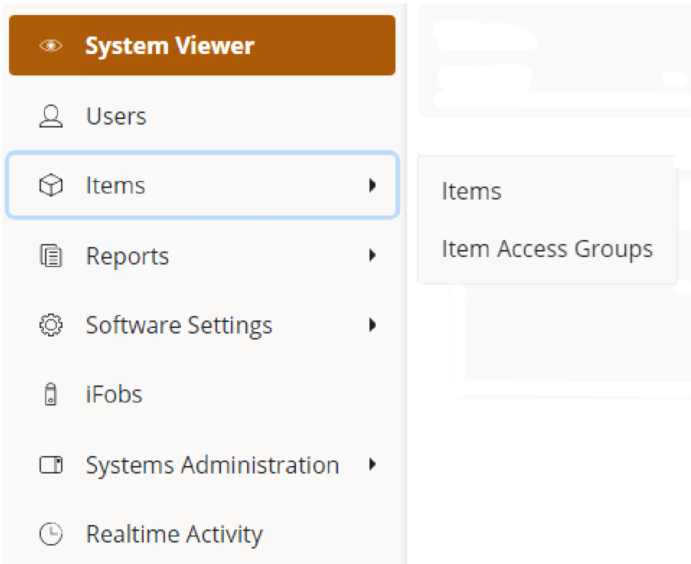
4.6.3 MENU

4.6.3.1 NAVIGATION MENU

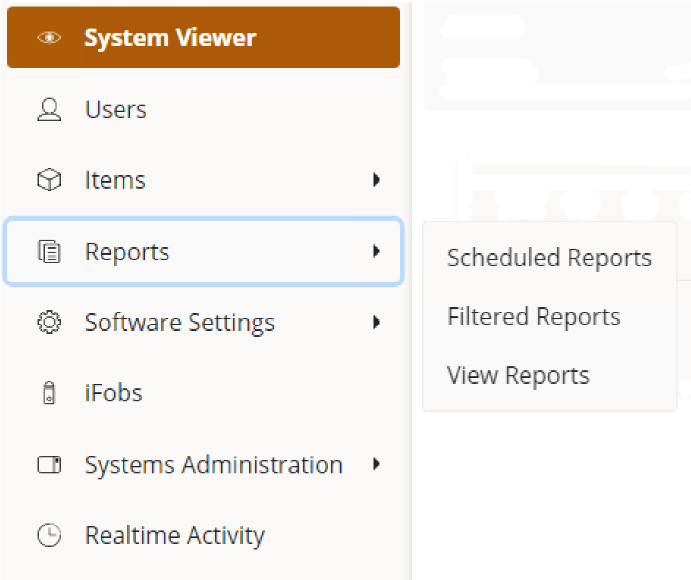
To the left of each screen, you will notice the Navigation Menu. From here, you will be able to navigate to the different pages of TrakaWEB such as the System Viewer, Users and Systems etc. See the diagram below for a breakdown of each area.



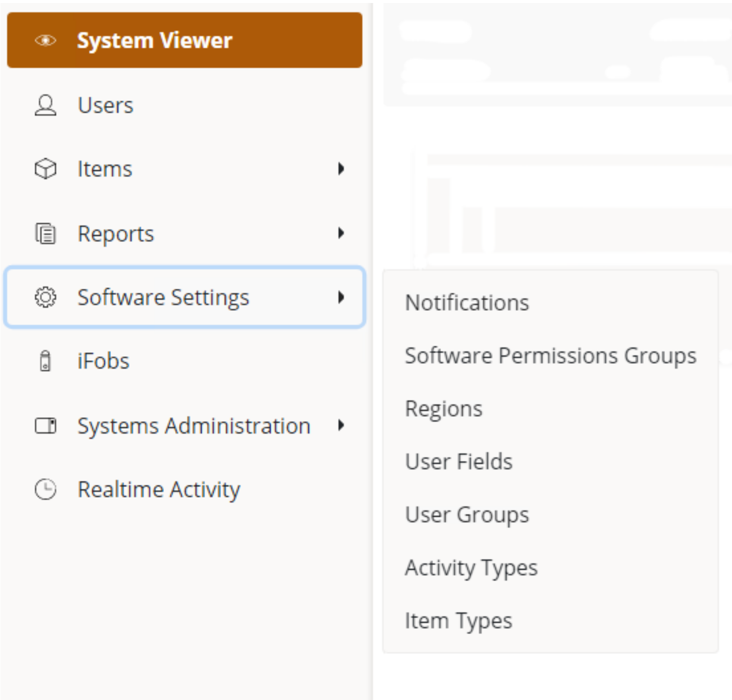
Clicking on these buttons will take you to the corresponding page. However, there are three exceptions to this. Items, Reports and Software Settings have sub-menus that will appear when they have been clicked once.



Items Sub-Menu



Reports Sub-Menu



Software Settings Sub-Menu

For more information on the other pages of TrakaWEB, please review the **Main User Guide** section.

4.6.3.2 TOOLBAR

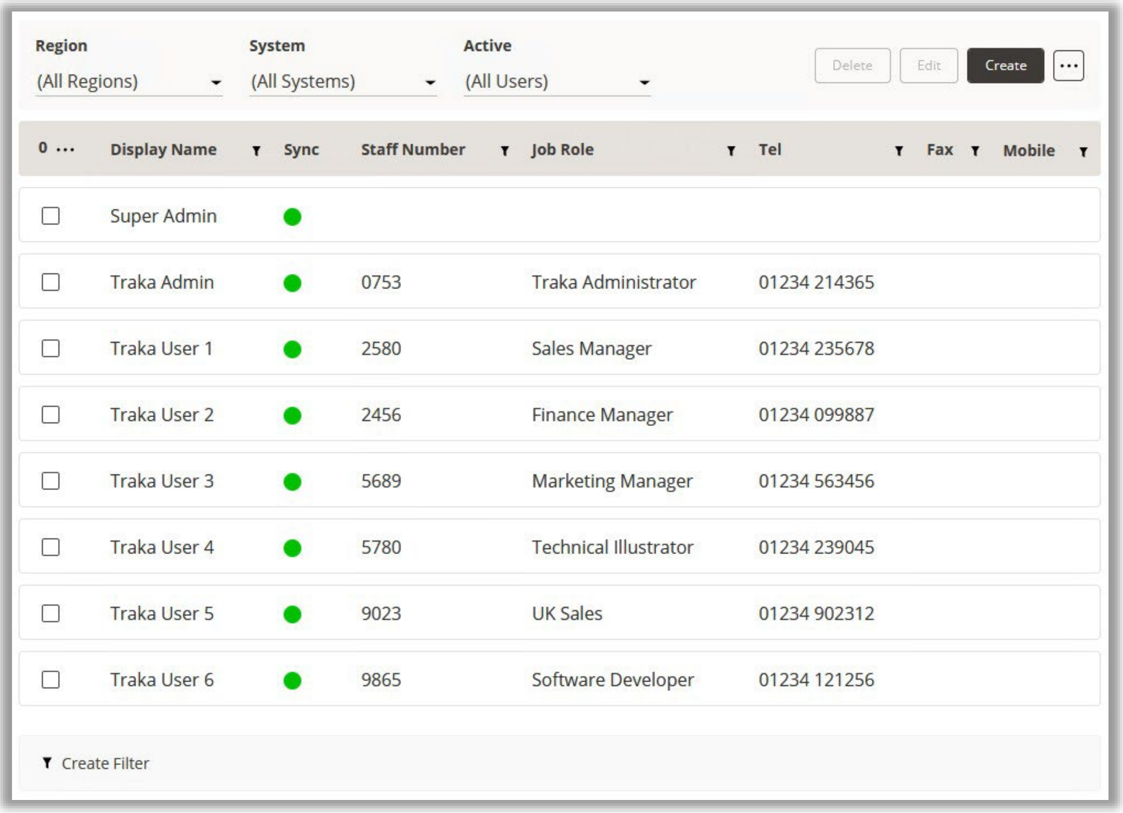
Located at the top of most pages throughout TrakaWEB is the Toolbar. From here, you can select various options that are specific to each page e.g., if you were currently viewing the User page you would see the following ribbon toolbar.

The drop-down sections on the toolbar consist of **Region**, **System** and **Active** selection. Clicking the small arrow button next to the region or system name will display a list of the regions/systems that currently exist in your database. For more information, please see the separate topics for Regions and Systems. The Active selection will only be found in some areas of TrakaWEB, such as the User List. This allows you to filter the users if they are active or inactive. You can also select an 'All' option to view all users.

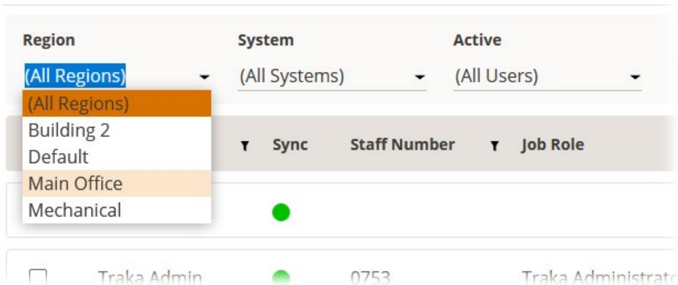
Filtering

There are several ways to filter information in TrakaWEB by using the Toolbar. On the right-hand side of the Toolbar, you will see columns such as Region, System, Active, etc. These change throughout TrakaWEB and apply to the page you are currently viewing.

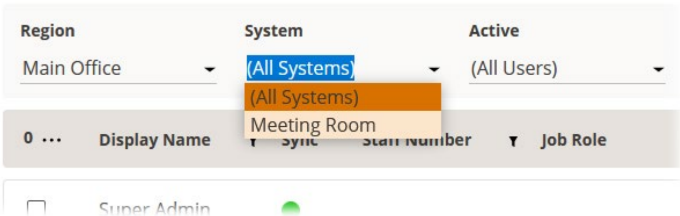
Simply select the drop-down arrow and select one of the supplied options and the corresponding grid will filter the information accordingly. For example, below is an image of the user list. In this instance, the customer has a database with many systems that are also in different regions and many users who have access to various items.



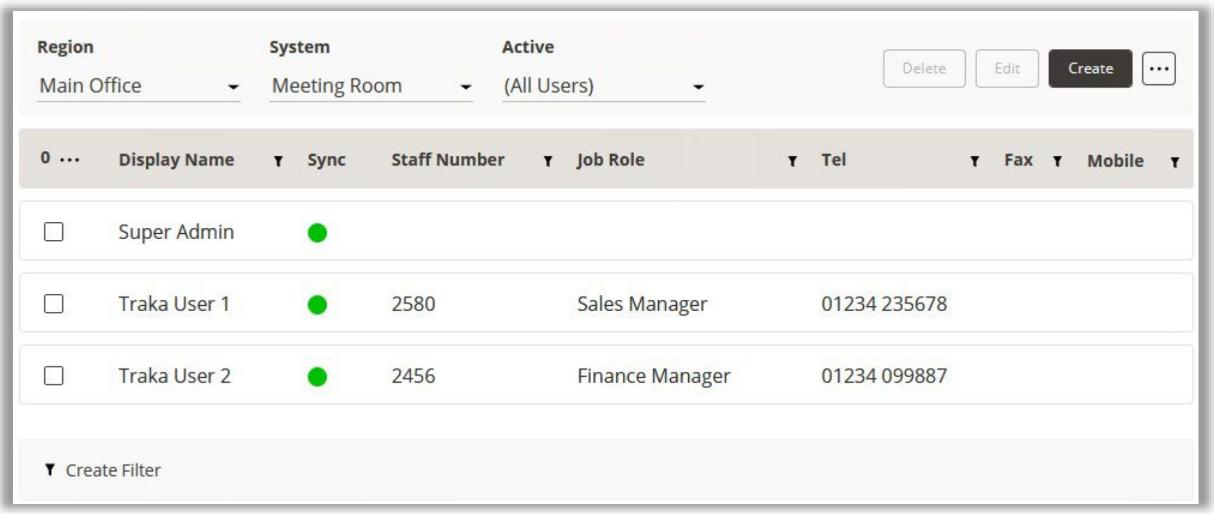
To find all the users that are in a specific region, simply select the Region drop-down selection arrow and choose a region from the pre-configured options.



This will then narrow down the list of users to those who are only in the specified region. You can further strengthen this search by selecting a specific system within the region.



Now the results have been filtered twice making it easier to find the information that is required.



Common Buttons in TrakaWEB

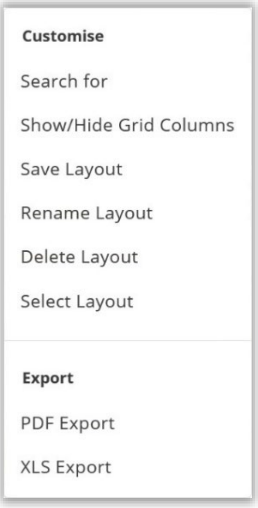
The buttons and options will change according to the page you are currently working on. Several common buttons appear in many places throughout TrakaWEB. Please see below for button descriptions. Please use the hyperlinks to view more information about the feature the buttons represent.

General Options

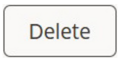
The General options are located to the upper right of the page.

Customise/Export Options

The **Customise/Export** menu is made available by clicking on the ... **Ellipsis** button.

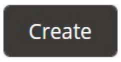


4.6.3.3 GENERAL OPTIONS



When viewing such pages as users or items, you can highlight a line of data and click the **Delete** button to delete that user/item/group etc.

When viewing such pages as users or items, you can highlight an existing user or item and click the **Edit** button to edit that particular user/item/group etc.



When viewing such pages as users or items, you can click the **Create** button to add a new user/item/group etc. to the database.

When displayed, clicking on the **Ellipsis** button will open a menu list that will vary according to the page you are currently viewing.

The **Cancel** button can be found in various places throughout TrakaWEB. Selecting it will cancel any changes you have made and take you back to the previous page.

The **Save and Return** button can be found in various places throughout TrakaWEB. Selecting it will save any changes you have made and take you back to the previous page.

The **Save** button can be found in various places throughout TrakaWEB, selecting it will save any changes you have made or are currently making.

5. MAIN USER GUIDE

5.1 TOOLBAR

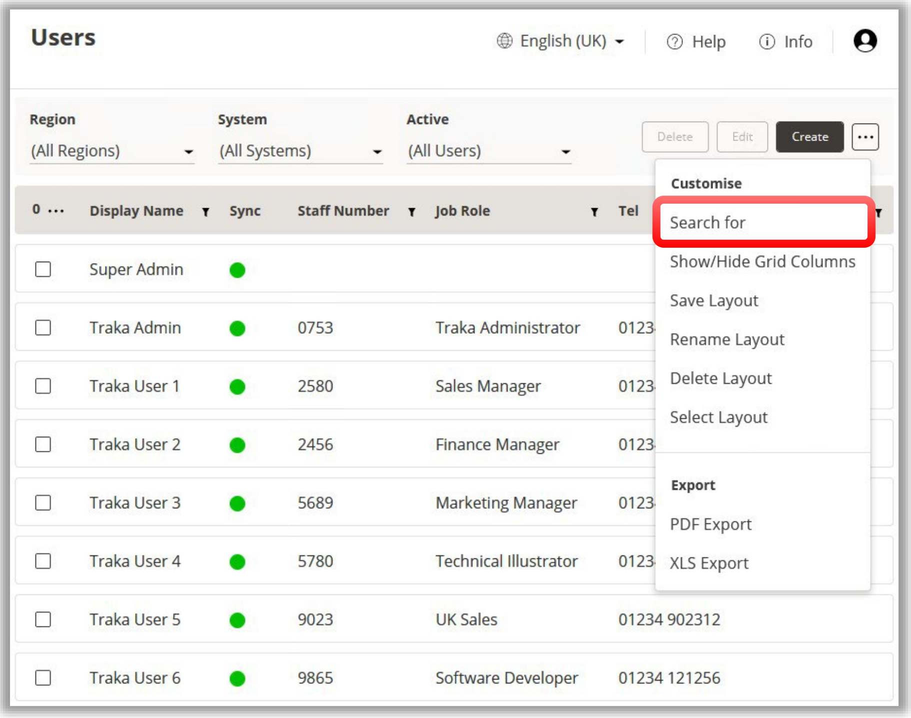
5.1.1 CUSTOMISE OPTIONS

5.1.1.1 SEARCHING

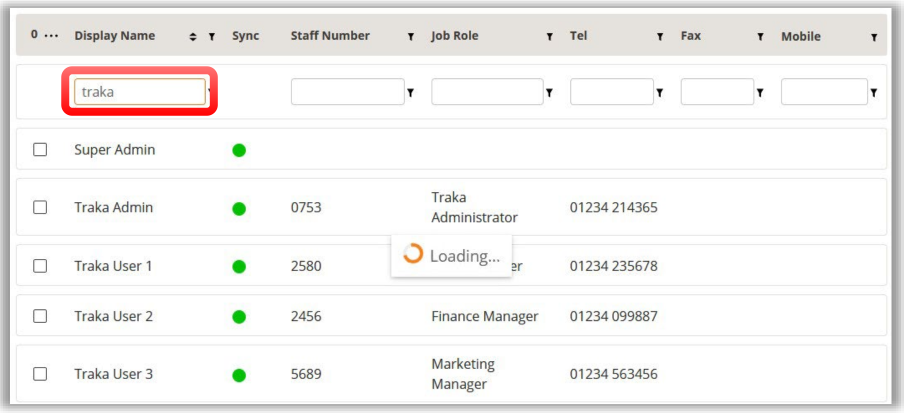
Throughout TrakaWEB, you can search for specific information from the Toolbar. Selecting the **Search for** option from the Customise menu will enable you to search for a user, activity, item description etc. directly from each column on the page. The example below shows the search feature being used on the Users page. Although pages throughout TrakaWEB may differ, the principle of the search tool remains the same.

1. From the **Users** page, open the **Customise** menu by clicking on the **Ellipsis** button.

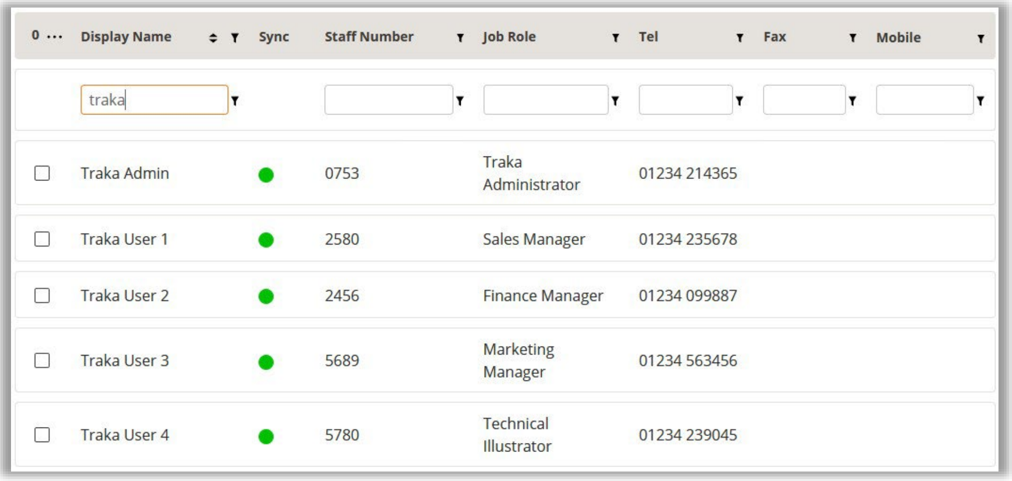
2. Next, click on **Search for.**



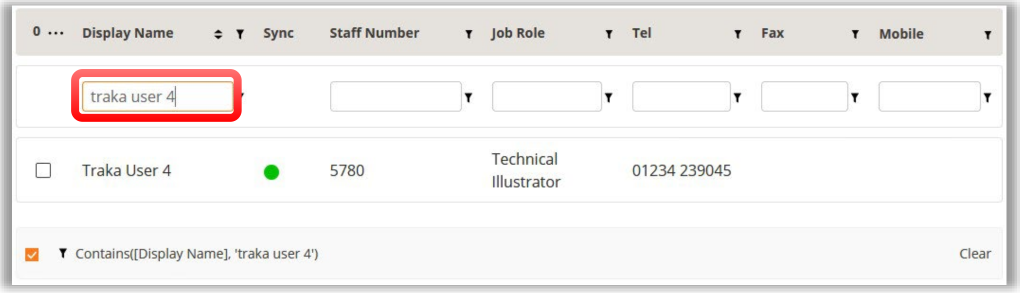
Each column will now have its own search field as shown. In the example below the name ‘Traka’ has been entered into the **Display Name** column on the **Users** page.



TrakaWEB will now search for any details for anyone with the name ‘Traka’.

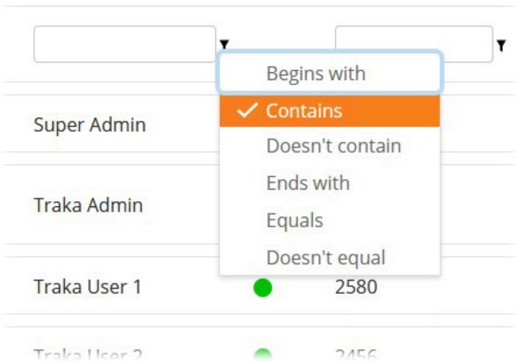


TIP: As you can see in the example above, there are multiple users with that same first name. Therefore, to find specific user details, the search will need to be refined. In this example, adding the users’ full name would narrow the search down to a particular user rather than a group of users who share a first name.



Search Filters

When the search feature is enabled, a small filter icon will appear at the right-hand side of the search field. Clicking this will display a small drop-down box with several filtering terms that can be applied to your search. For example, selecting the term 'begins with' is useful when searching a user’s first name.

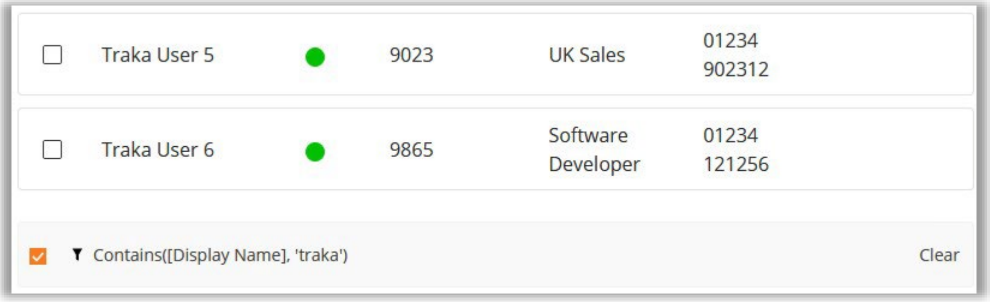


Clearing Searches

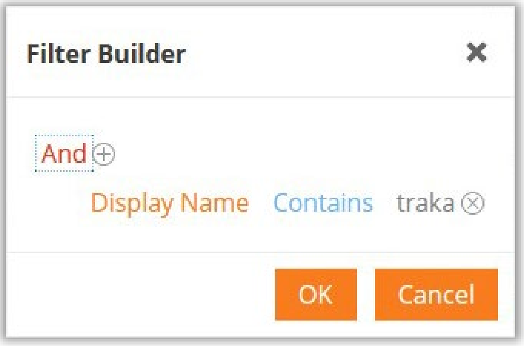
Clicking 'Clear' in the bottom right-hand corner of the grid will clear the current search and the grid of all information before the search took place.

Filter Builder

The Filter Builder allows you to add multiple filters to each search. After you have entered a search term, such as the name 'Traka' into the **Display Name** column, the bottom left of the grid will display the current filter setting. In the image below, the filter was set to **Contains Display Name** and the search term was 'traka', which means any activities generated by anyone named Traka will be displayed in the activity grid. At the bottom left-hand side of the grid are the details of the current search. Clicking that text will open a new window that will allow you to add multiple filters to one search, narrowing your results and making it easier to find the information you are looking for.

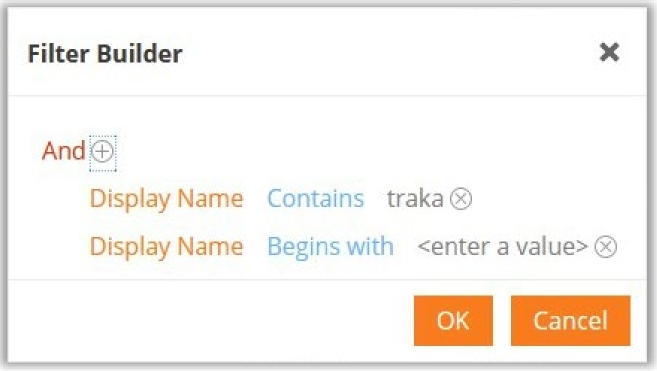


The Filter Builder will list the filters used to generate the last search. In this case, the filter was set to the column **Display Name** (highlighted orange), the value searched against was **Contains** (highlighted blue) and the search term was **Traka** (highlighted grey).



Clicking 'And' will add another filter to the list. Each filter is split into three definable sections. The first is the column section highlighted in orange, the second is the filter value highlighted blue and third is the search term highlighted in grey.

NOTE: Each definable section such as columns (highlighted in orange) will be different for each page of TrakaWEB you are viewing, e.g., using the Filter Builder to search in Item Types, there will only be one option for the columns section as you can only search by the name of the item type.

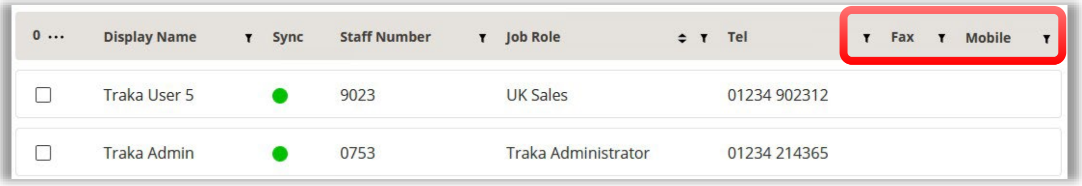


5.1.1.2 LAYOUTS OVERVIEW

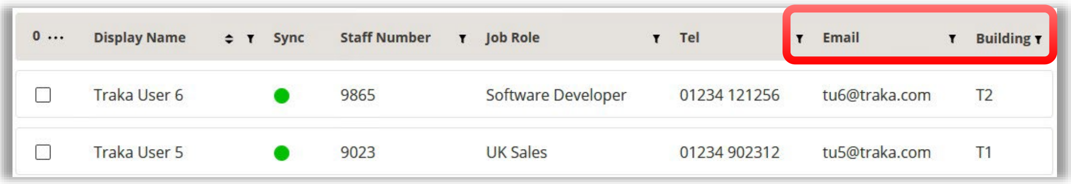
A Layout is a combination of columns you can apply to most of the grids across TrakaWEB. After you have added or removed columns from a particular grid, you can save that particular selection which is known as a 'Layout'. Once saved, the layout will keep the columns in the order which you left them when it was saved.

In the example below, the user is currently on the System Viewer page with position two highlighted and is now looking at the Access tab on the Activity & Access grid. By selecting a layout that has already been saved, you can see that two extra columns have appeared providing more information about the users who have access to position two.

In the example below, the user is currently on the **Users** page. By selecting a layout that has already been saved, you can see that two of the columns; **Fax** and **Mobile** have changed and now provide information for **Email** and **Building**.



Standard Layout

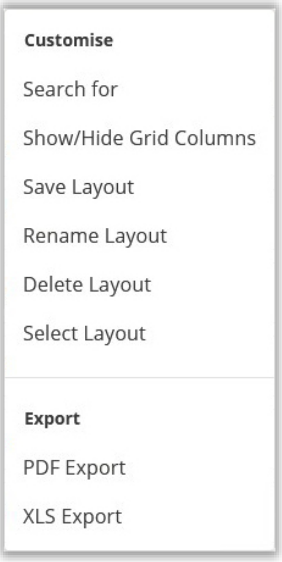


Custom Layout

NOTE: All layouts are exclusive to the grids or column headers which they are made for. For example, you cannot create a layout for the grid on the User List page and then apply it to the grid on the Items page. Each grid contains different information concerning the data it represents. Layouts from other grids may not be applicable to the information on other pages.

NOTE: If you are viewing or creating a new layout and leave the page and return, the grid will automatically switch to the default layout, and you will need to Select a Layout.

To access the layout settings, click on the **Ellipsis** button at the upper right of the page.



See Also:

- Creating a layout - Show/Hide Grid Columns
- How to Save a Layout
- How to Rename a Layout
- How to Delete a Layout
- How to Select a Layout

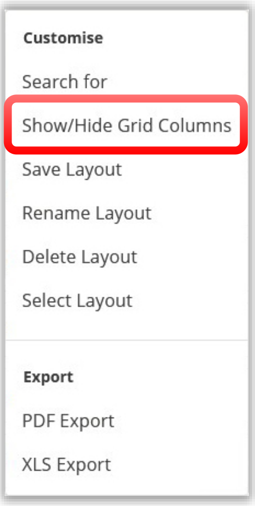
5.1.1.3 SHOW/HIDE GRID COLUMNS

Throughout TrakaWEB, there are many grids that display important information for the page you are currently viewing. The Show/Hide Grid Columns button allows you to add or remove Grid Columns on the page you are currently viewing. Once you have added a field to the grid, it becomes a column that you can move or remove.

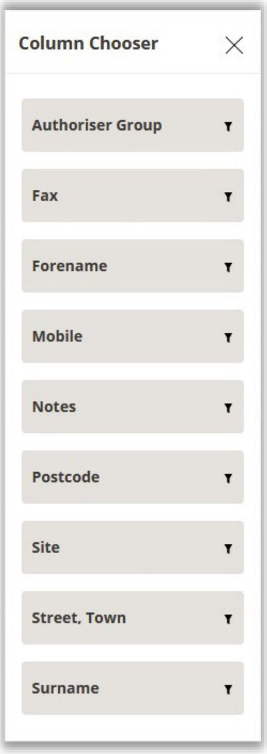
When adding extra fields to a grid, it is important to remember that each column header is different and the fields that can be placed and taken away will vary from grid to grid. In the example below, we will select the field **Mobile** to be added to the grid on the Users page.

NOTE: The 'Show/Hide Grid Columns Chooser' in the 'Credentials' tab within a User's details is different to all other grids. This Column Chooser uses check boxes to select the required grid columns rather than a drag/drop Column Chooser used in other grids.

1. Access the layout settings by clicking on the ... **Ellipsis** button at the upper right of the page.
2. Next, select **Show/Hide Grid Columns** from the menu.

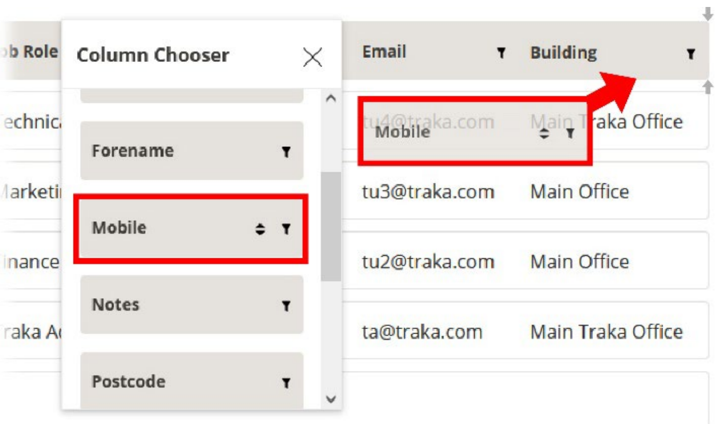


A window will now appear displaying a number of different fields to add to the existing columns. Depending on the page you are viewing and the current data on screen, each grid or tab will have a different selection of columns for you to select and customise.

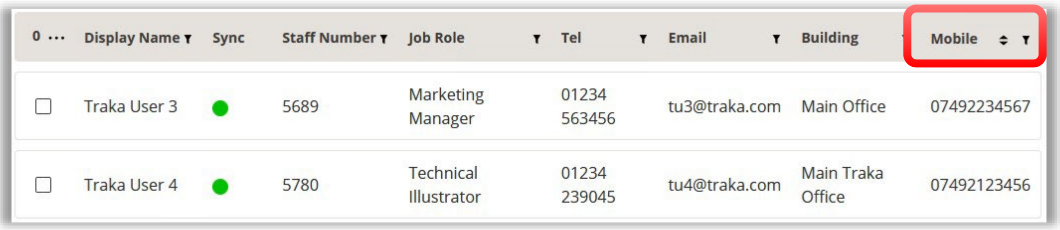


The fields you can select from are relevant to user i.e., mobile number, fax, email etc. These fields are definable in the User Fields.

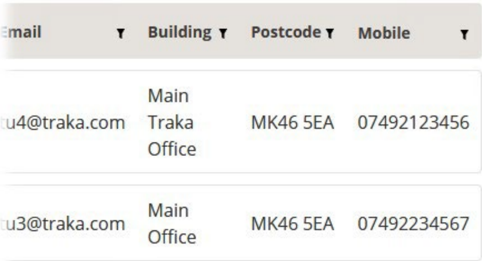
3. To add a column to your grid, simply drag and drop the desired field to the Column Header. The grey arrows will indicate where the new field will fit into the grid.



Once the field is placed, the grid will show the data that field represents. In this case, the **Mobile** field was added and therefore, if the users listed in the grid have a mobile number entered into their user details page, it will now be displayed here.



You can add multiple fields to a grid by simply following the above steps.

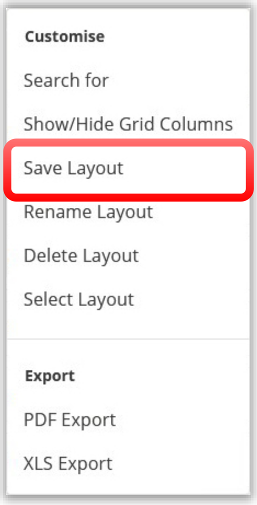


4. If you have a specific set of columns that you may wish to view again, you can save them and give them a unique name. This is known as a Layout. Please review the following topic to Save a Layout.

5.1.1.4 SAVE LAYOUT

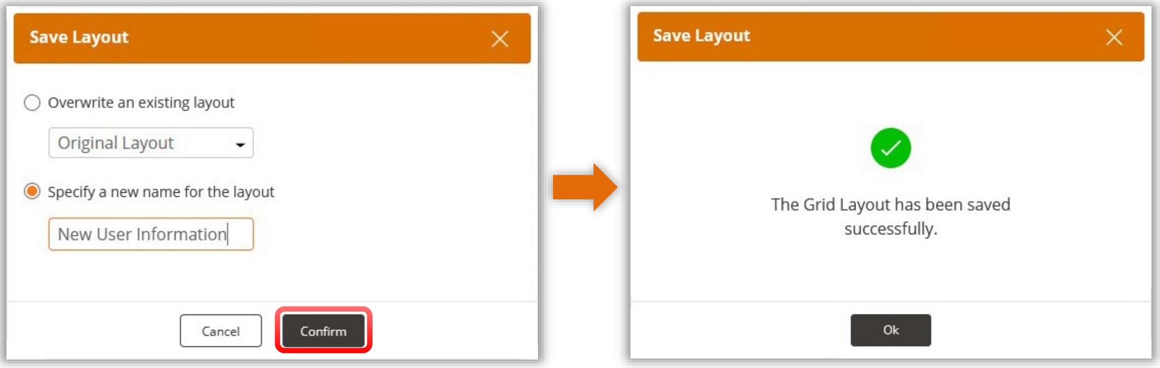
After you have customised a grid by adding, moving or deleting columns/fields, you have the option to save that selection so that you can later return to the same grid and select a pre-configured layout without having to select different columns/fields.

1. From the **Customise/Export** menu, select **Save Layout.**



The following window will appear prompting you to assign a name to the layout. You have the option of saving a new layout or overwriting an existing one.

2. Enter a name for the layout and click **Confirm**.



3. The layout is now saved and can be renamed, deleted, or selected from the Toolbar.

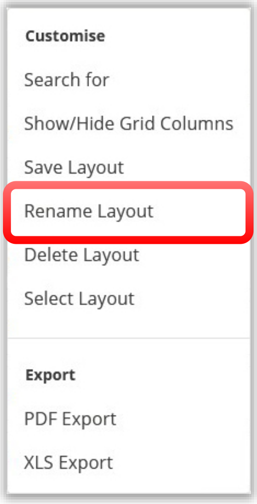
See Also:

- Creating a layout - **Show/Hide Grid Columns**
- How to **Save a Layout**
- How to **Rename a Layout**
- How to **Delete a Layout**
- How to **Select a Layout**

5.1.1.5 RENAME LAYOUT

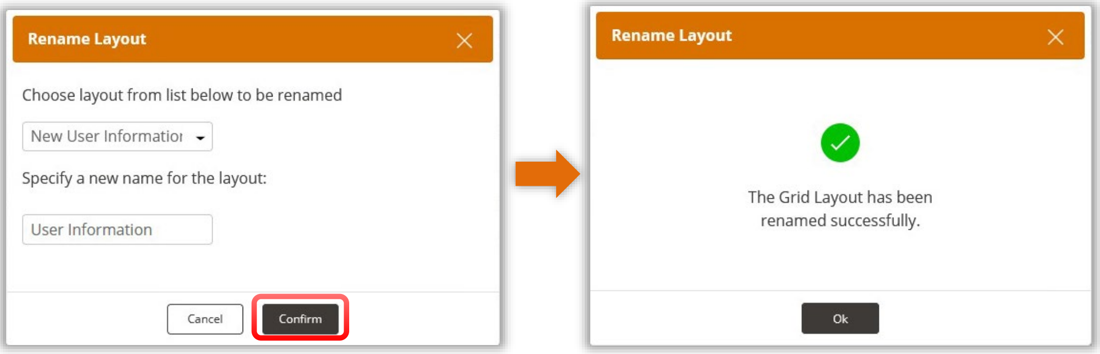
After a layout has been saved, you can rename it at any time if you wish to do so.

1. From the **Customise/Export** menu, select **Rename Layout.**



The following window will appear prompting you to select a layout and enter a new name.

2. Once you have selected the desired layout and typed in its new name, click the **Confirm** button.



3. The layout is now saved against its new name. You can delete or select it from the Toolbar.

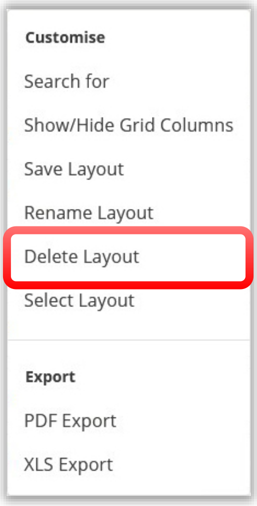
See Also:

- Creating a layout - **Show/Hide Grid Columns**
- How to **Save a Layout**
- How to **Rename a Layout**
- How to **Delete a Layout**
- How to **Select a Layout**

5.1.1.6 DELETE LAYOUT

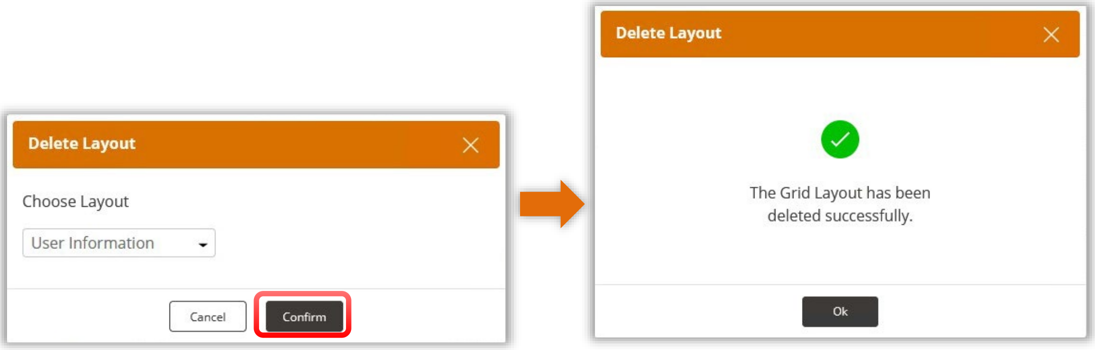
After a layout has been saved, you can delete it at any time if you wish to do so.

1. From the **Customise/Export** menu, select **Delete Layout.**



The following window will appear prompting you to select a layout to delete from the drop-down menu.

2. Once you have selected the desired layout click the **Confirm** button.



3. The layout has been deleted and is no longer selectable or editable.

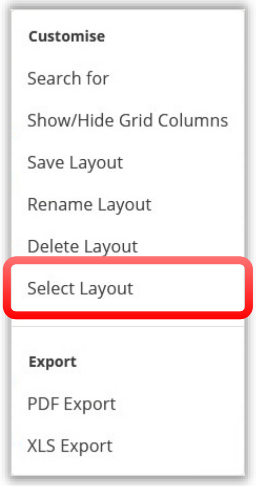
See Also:

- Creating a layout - **Show/Hide Grid Columns**
- How to **Save a Layout**
- How to **Rename a Layout**
- How to **Delete a Layout**
- How to **Select a Layout**

5.1.1.7 SELECT LAYOUT

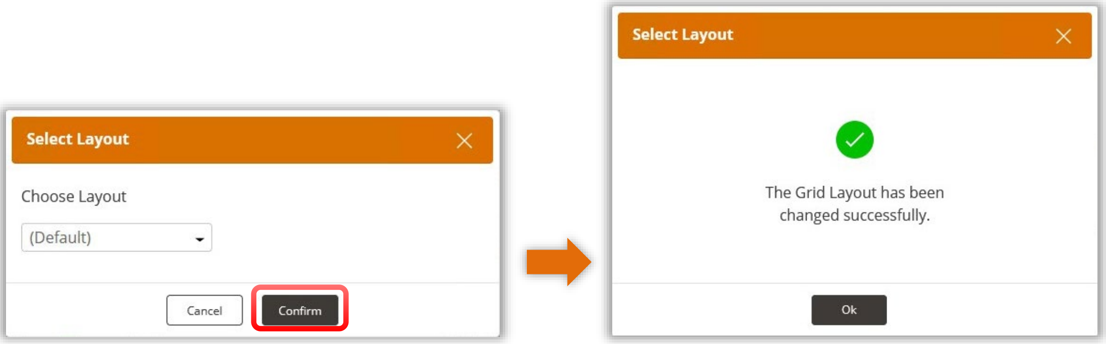
After a layout has been saved, you can select it and any other layouts at any time.

1. From the **Customise/Export** menu, select **Select Layout.**



The following window will appear prompting you to select a layout to view.

2. From the dropdown menu, select the layout you wish to select and then click on the **Confirm** button.



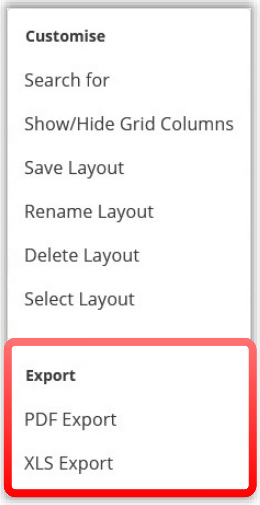
3. The previous layout being displayed on the grid will now change to the newly selected layout.

See Also:

- Creating a layout - **Show/Hide Grid Columns**
- How to **Save a Layout**
- How to **Rename a Layout**
- How to **Delete a Layout**
- How to **Select a Layout**

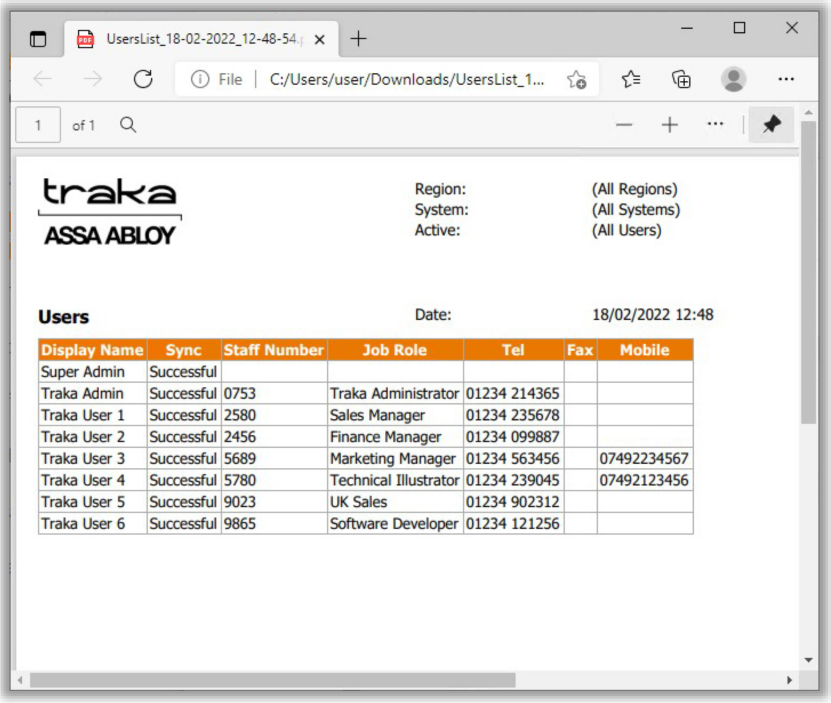
5.1.2 EXPORT OPTIONS

The option to export TrakaWEB data to either PDF or XLS format is accessed through the layout settings by clicking on the  **Ellipsis** button at the upper right of the page.



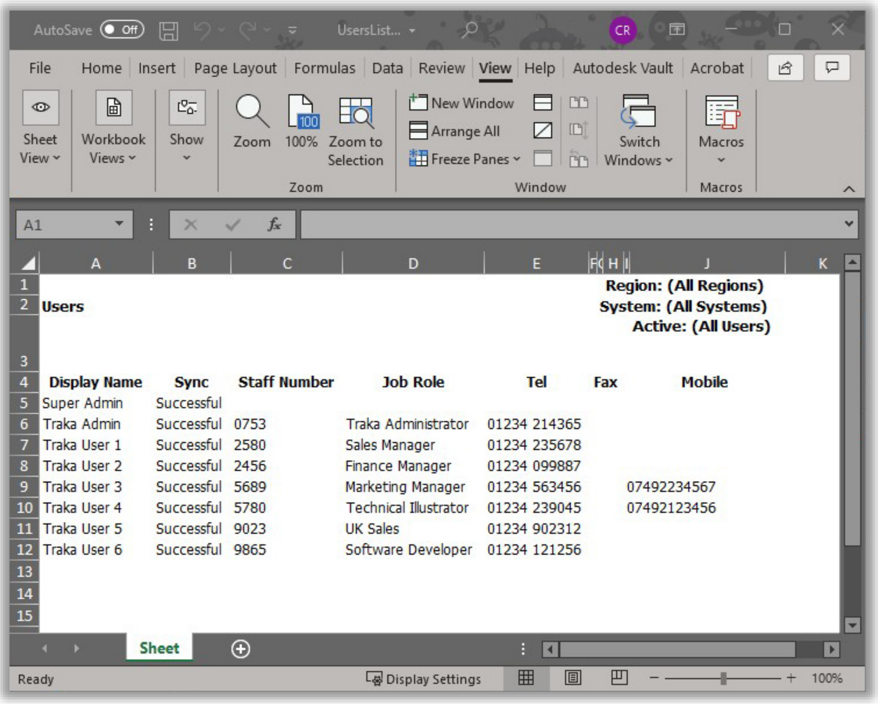
5.1.2.1 EXPORT TO PDF

In TrakaWEB, it is possible to export the data from whatever grid you are viewing into PDF format. Simply select the **PDF Export** option from the **Customise/Export** menu and you can choose to either view the PDF in a new browser or download it.



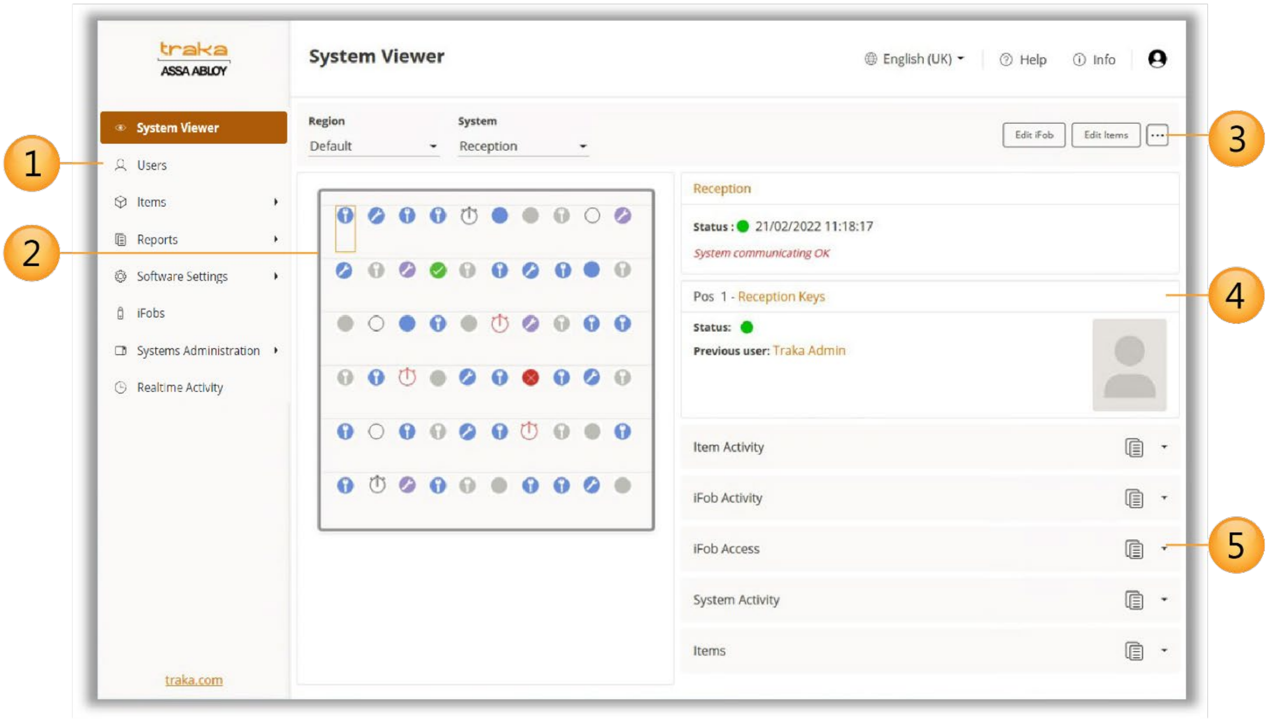
5.1.2.1 EXPORT TO EXCEL

In TrakaWEB, it is possible to export the data from whatever grid you are viewing into PDF format. Simply select the **XLS Export** option from the **Customise/Export** menu and you can choose to either view the Excel Spreadsheet in a new browser or download it.



5.2 SYSTEM VIEWER

The System Viewer allows you to see a representation of your Traka Touch system on your PC. This is the 'Home' screen of TrakaWEB that will appear each time you log in. From here, you can view all the activity of each system in the database. Only one system can be viewed at a time.



1 – Navigation Menu

At the left side of each page in TrakaWEB, you will notice the Navigation Menu. From here, you will be able to navigate to the different pages of TrakaWEB such as the System Viewer, Users, and Systems etc.

2 – System Display

The System Viewer displays an interactive image that represents the type of Traka Touch system you have. The colours and icons of the iFobs/Items in the system viewer change depending on their current status. These icons also differ between Key Cabinets and Locker Systems.

Key Cabinet Status Icons

 - No iFob defined

 - iFob currently in the system with no items attached

 - iFob currently in the system with items attached

 - iFob with no items currently out of the system

 - iFob with items currently out of the system

 - iFob currently out of the system and under a curfew

 - iFob currently out of the system and is overdue

 - iFob currently in the system and has a fault logged against it

 - iFob currently in the system and has a repaired fault logged against it

 - iFob in the wrong slot. The X shows the where the iFob has been incorrectly located

 - iFob in the wrong slot. The ✓ shows the where the iFob should be correctly located

? - No information available on the related iFob and/or item

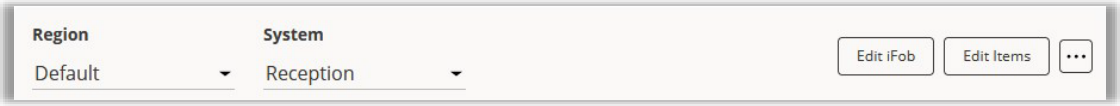
Locker System Status Icons

- Asset currently in the system with no item defined
- Asset currently in the system with item defined
- Asset with no item defined currently out of the system
- Asset with item defined currently out of the system
- Asset currently out of the system and under a curfew
- Asset currently out of the system and is overdue
- Asset in wrong compartment. The X shows where the asset has been incorrectly located
- Asset in wrong compartment. The ✓ shows where the asset should be correctly located
- Asset has become undetectable

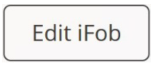
NOTE: The Locker System status icons will not update for Non-RFID Locker Systems as it is not possible to detect if an asset is present in the system.

3 – Toolbar

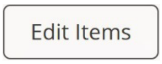
The Toolbar is located at the top of each page. It will display certain buttons and information that are used in every aspect of TrakaWEB no matter where you navigate to. Please follow the link for more details about the TrakaWEB Interface.



Clicking the dropdown menus to the left for Region or System will display a list of the Systems/Regions that currently exist in your database.



- Selecting the **Edit iFob** button will open the iFob Details tab in the Edit iFob menu for the currently selected iFob in the System Viewer



- Selecting the **Edit Items** button will open the Item Details tab in the Edit Item menu for the currently selected Item in the system Viewer

- Selecting the **Ellipsis** button will open the **Actions Menu**

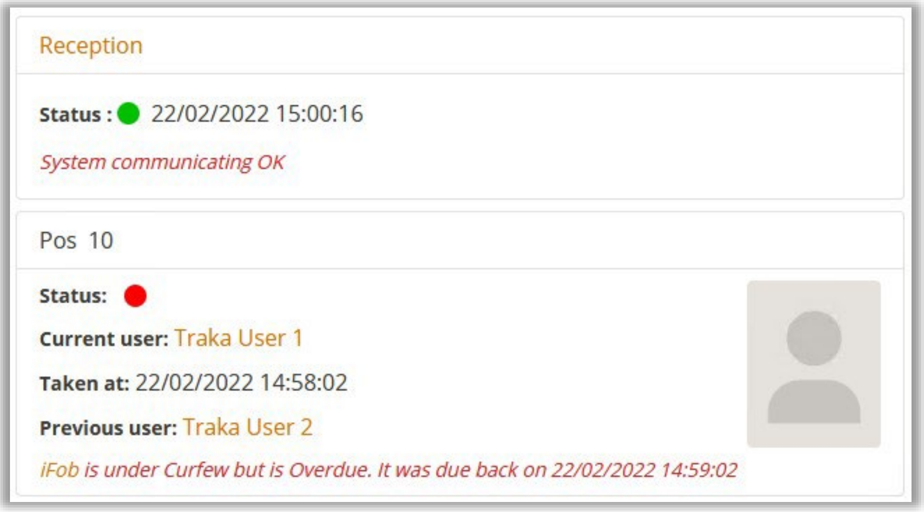
Remote Release

Remote User Login

Transfer Ownership

4 - System & Item Detail Panels

The system & Item Detail Panels will be located to the right of the cabinet or locker image. The first panel shows the status of the system and the second shows the status of the item for the currently selected position.



System Detail Panel

The System Detail Panel shows the status of the Traka Touch system. It will display the system title, date & time at the system, and the connection status. If the status LED is green, that indicates the system is currently connected to TrakaWEB. If the LED turns red, this will mean there has been a disconnection, check the network cable has not been removed and ensure the system is switched on. If the status LED is orange, that indicates the system connection to TrakaWEB is now being established and the system information is now being updated.

Item Detail Panel

The Item Detail panel shows the iFob or item description, the user who currently has the item, when it was taken, the previous user who removed the item and if the iFob/item has a curfew. In the image above, position 10 is highlighted; therefore, the Item Detail Panel is showing a red LED indicating that a curfew has been placed on the item and is overdue. In this case, the iFob/item had a curfew and should have been returned to the system at 14:59:02 on the 22/02/2022 but has not been returned. Therefore, a message has appeared at the bottom of the panel stating that the item is overdue.

5 - Item Activity & Access Grid

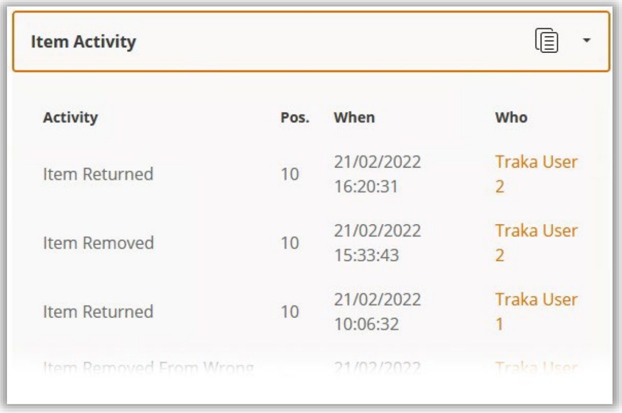
To the right of the cabinet image is the **Item Activity & Access grid**. This grid will display:

- The last 30 days of activities for the items in the selected position
- The last 30 days of activities for the iFob (RFID Tag if it is a locker system) in the selected position
- All users who have access to the iFob/item in the selected position
- The last 30 days of system activity
- The items defined for the selected position

Item Activity

The item activity tab displays the last 30 days of activities for the item(s) in the selected position. This grid will show you who removed and returned the item and what time it was removed/returned. You can run various reports for a more in depth look at these activities. A shortcut on the tab will take you directly to the Activity Report.

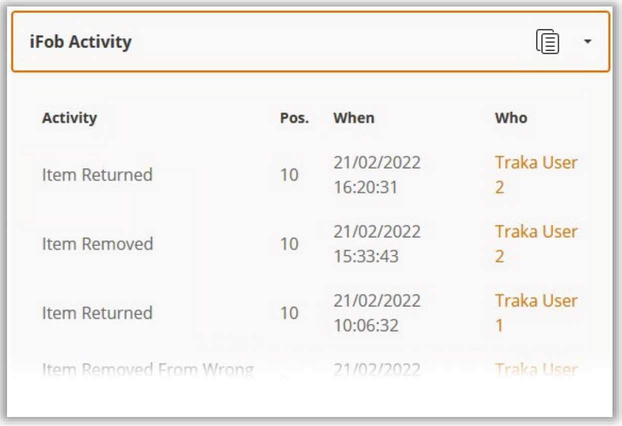
In a Traka Touch Key Cabinet, multiple items can be attached to an iFob; therefore, the item activity tab will display individual lines for each of the items attached to that iFob when it is removed/returned.



iFob Activity

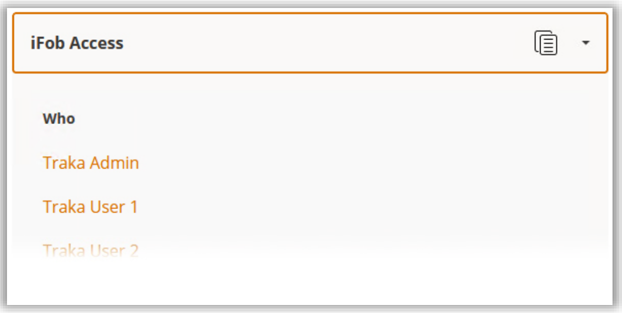
The iFob activity tab displays the last 30 days of activities for the iFob in the selected position.

If your system is an RFID Locker System, it will not contain iFobs. Therefore, the term 'iFob' is referring to the 'RFID Tag'. It is not possible to attach more than one item to an RFID Tag. Therefore, once an item has been defined, the Item Activity and iFob Activity tabs will display the same events. A shortcut on the tab will take you directly to the Activity Report.



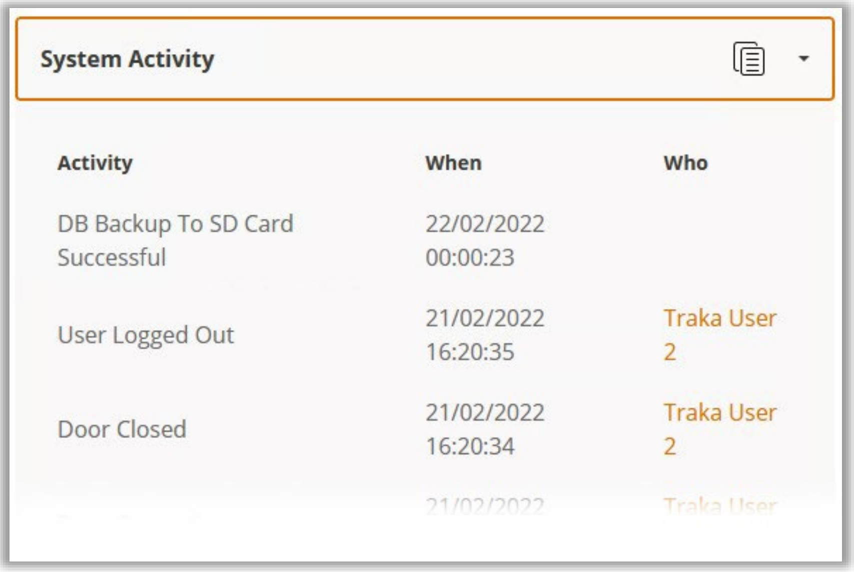
iFob Access

This tab lists the users who currently have access to the selected position. A shortcut on the tab will take you directly to the Item Access By Item Report.



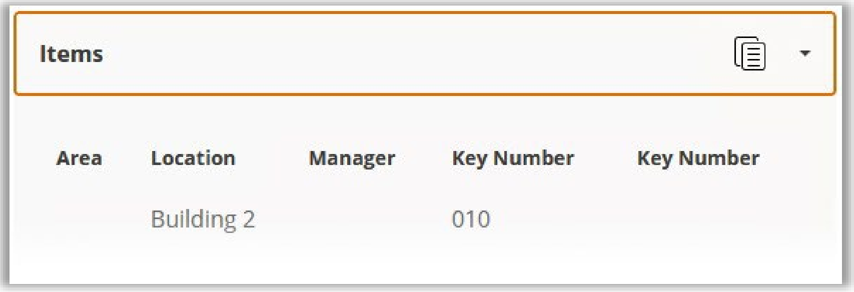
System Activity

This table is very similar to the 'Item Activity'. It displays the last 30 days of activities that have occurred at the system, e.g., Door Opened, Door Closed, Admin Access etc. A shortcut on the tab will take you directly to the Activity Report.



Items

This tab displays the details of the items currently attached to the iFob/RFID Tag. These description details are definable from the Edit Item Type section. A shortcut on the tab will take you directly to the Items page.



5.2.1 TRAKAWEB SYSTEM VIEWER GRID

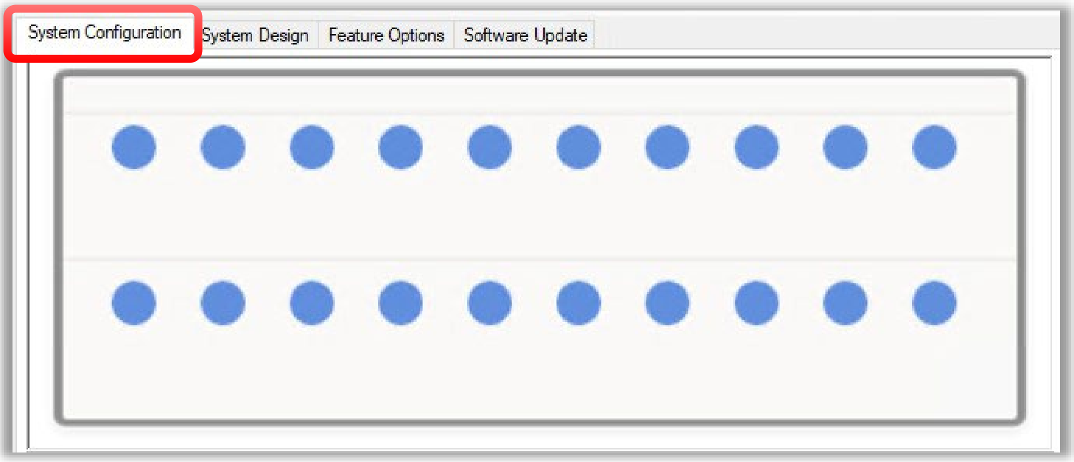
Due to the many permutations of physical locker designs, it is not always possible to display the interactive image of the locker within the TrakaWEB system viewer. Currently, there are only a subset of locker images available to use and so to resolve the issue, a System Viewer Grid is used. The System Viewer Grid shows the status of the physical system within TrakaWEB without having to display an image of the actual locker or cabinet.

Configuration of the System Viewer Grid is done within TrakaWEB Admin on a per-system basis. Although the option is available for both cabinets and lockers, the option to customise the TrakaWEB System Viewer Grid is specific to lockers only.

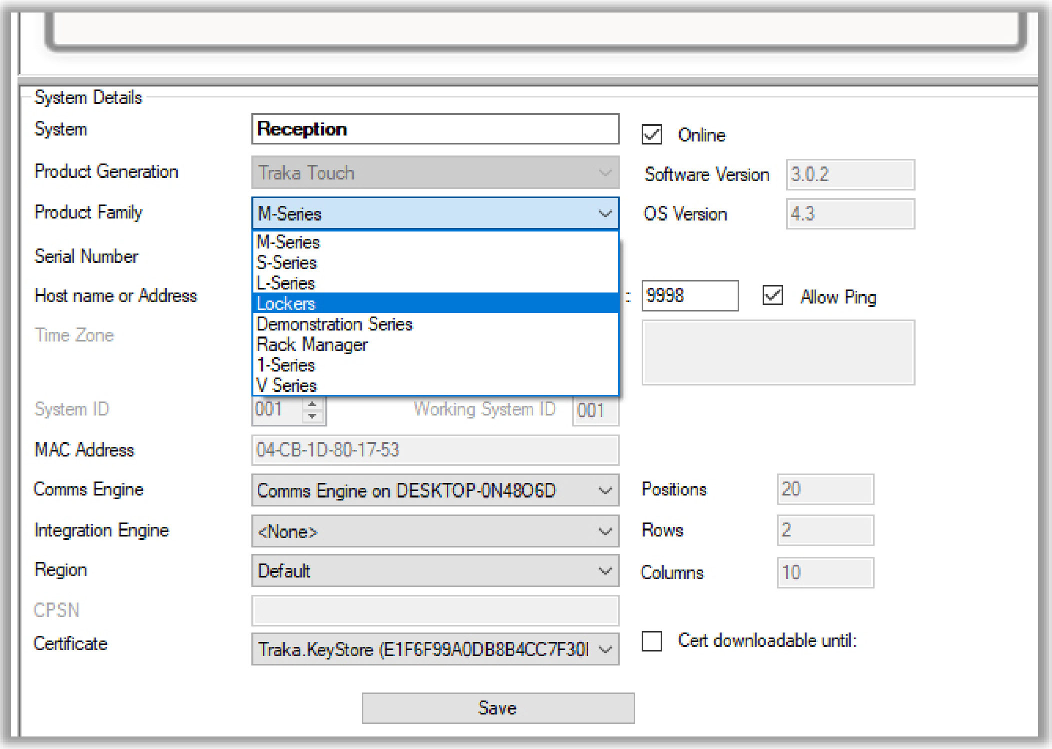
NOTE: When configuring cabinets, a user has the option to either view the system viewer grid or the interactive image within the system viewer in TrakaWEB.

System View Option and Custom Product Type

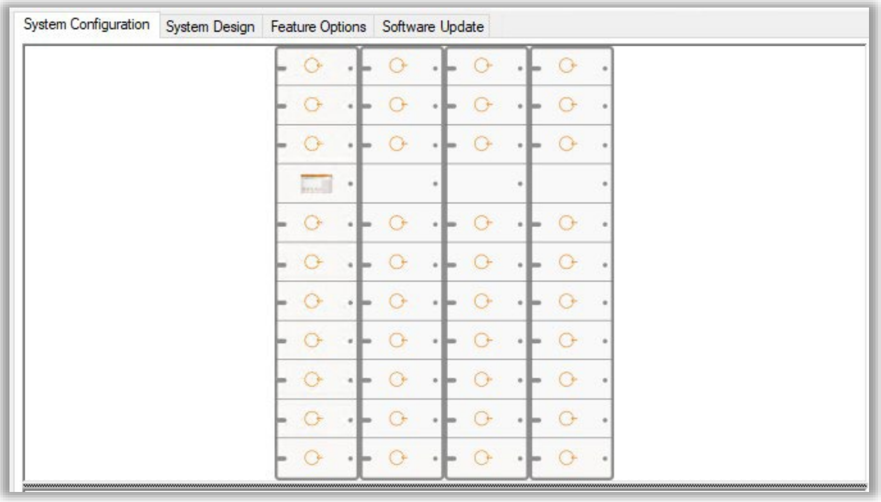
After launching the TrakaWEB Admin Application, the System Configuration screen will be displayed.



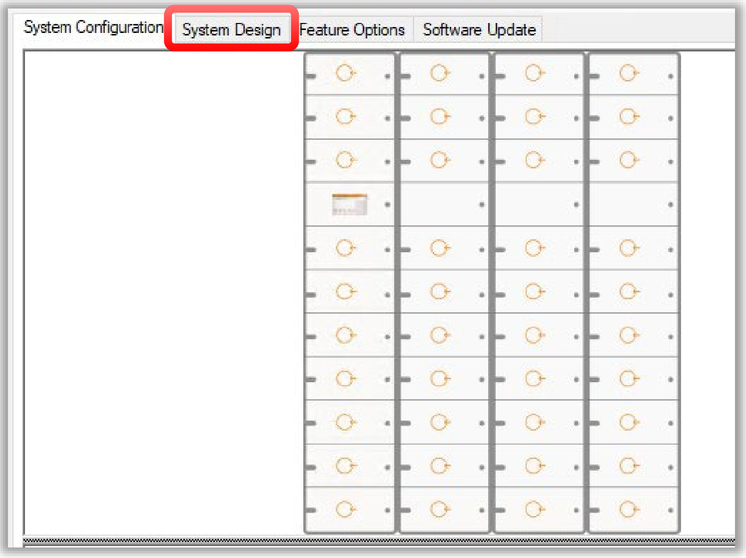
1. Locate the **Product Family** drop-down menu to choose a specific system type.



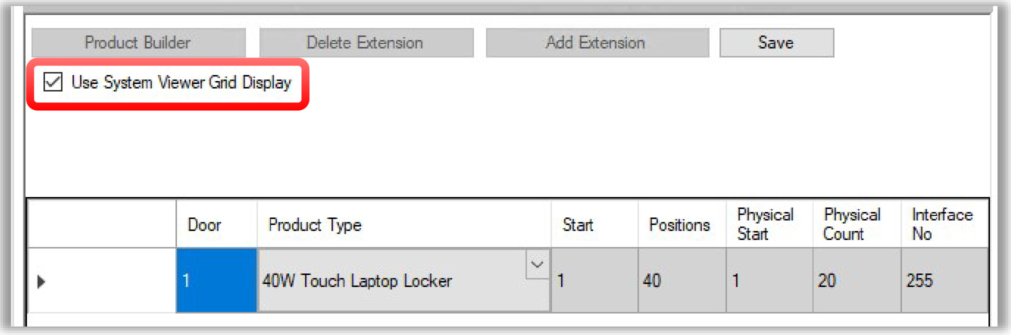
The screen will change to display the default locker image.



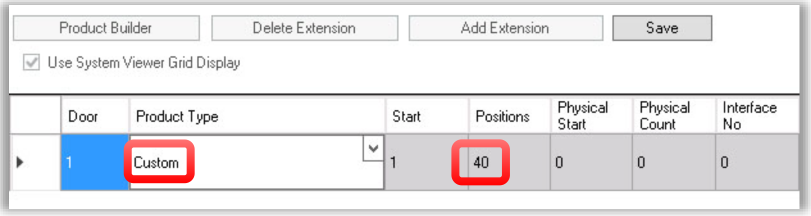
2. Click on the 'System Design' tab to edit the selected system type.



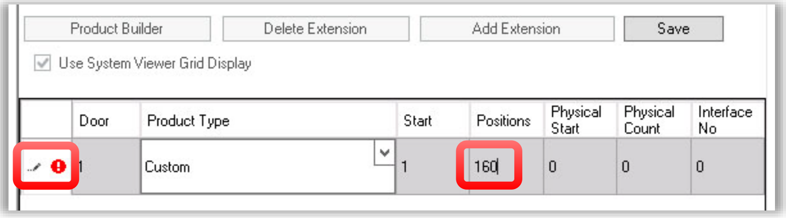
3. Within the System Design tab, click on the 'Use System Viewer Grid display' tick box.

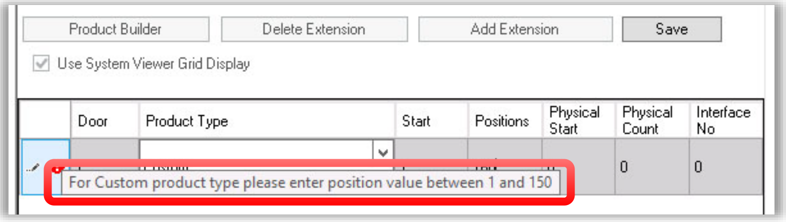


If the system to be configured is a locker, the 'Custom' option will be made available from the Product Type drop down menu. The custom product type is a product type that should be used when there is no system image available for the locker. When using the custom product type the user will be required to manually enter a number into the 'Positions' field for this system. The maximum value that can be entered will be 150.



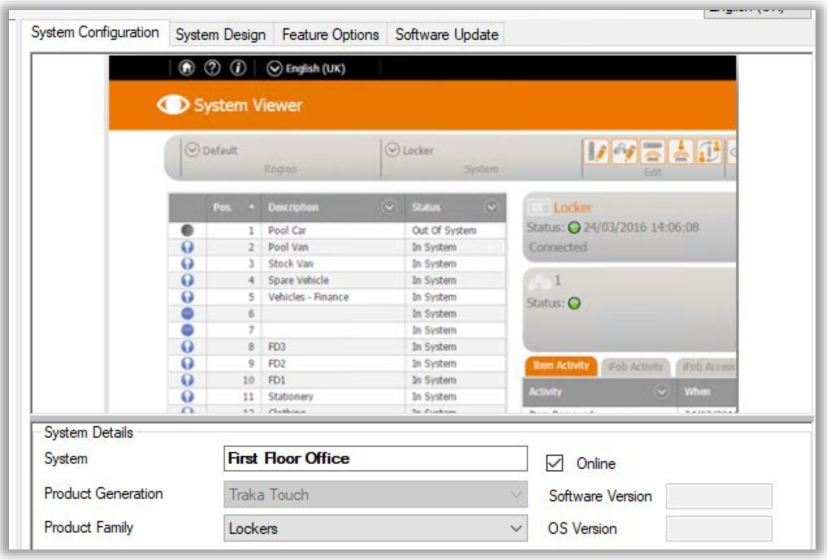
NOTE: The maximum value that can be entered within the 'Positions' field is 150. If this value is exceeded, an icon will appear in the left-hand box. Hovering the mouse cursor over the icon will display a message informing the user of this.





NOTE: If 'Custom' has been selected, the 'System Viewer Grid' must be used with that particular system. The tick box to select the 'Use System Viewer Grid Display' will be ticked and greyed out and the Product Builder will also be disabled.

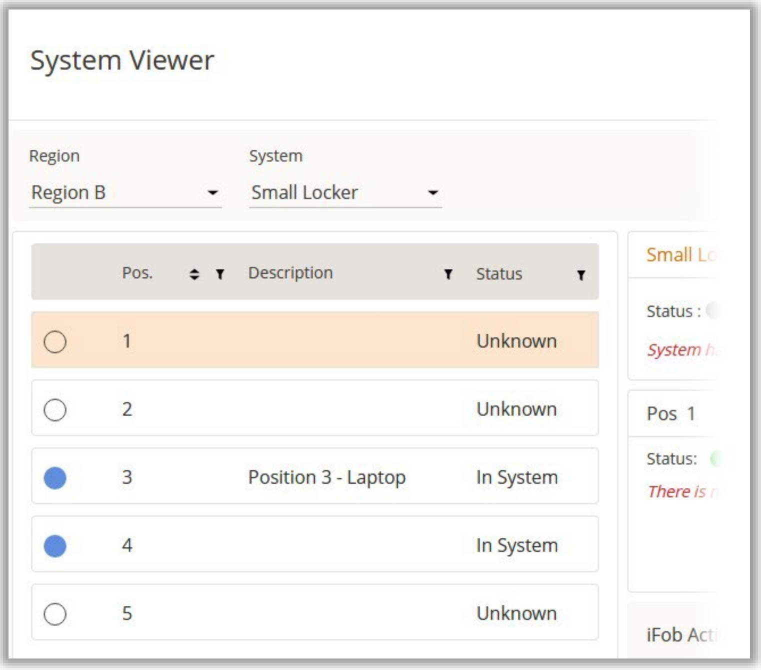
With the 'Custom' option enabled, a generic image will be displayed in place of the usual system image to indicate that this system is a custom type and that no image is currently available.



TrakaWEB System Viewer

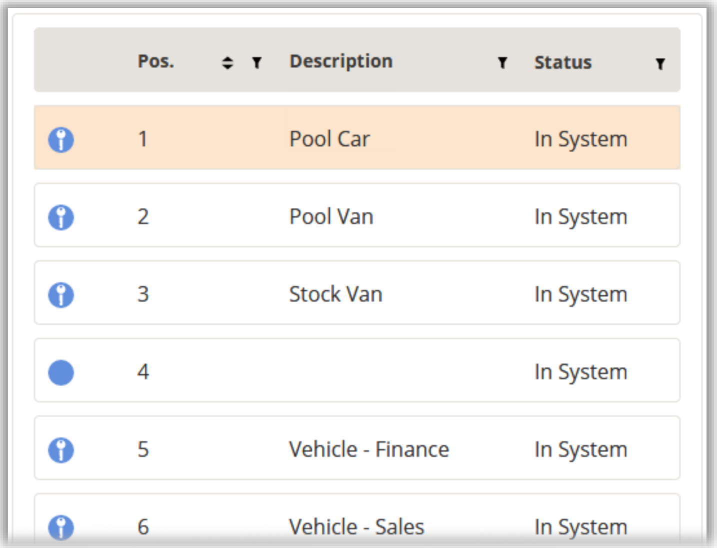
When TrakaWEB is launched, the System Viewer page will check to see if the current system should be displayed by an image or a System Viewer Grid as it loads. If the System Viewer Grid display is to be used, then the status information will relocate from the bottom left of the page to the top right of the page above the activity grids location.

The System Viewer Grid layout will change depending on which product type the system has been assigned. A typical System Viewer Grid may appear as shown below:



Fixed Return

For a fixed return system, each physical position will be represented by a row within the System Viewer Grid. Each row will be divided into columns as shown below.

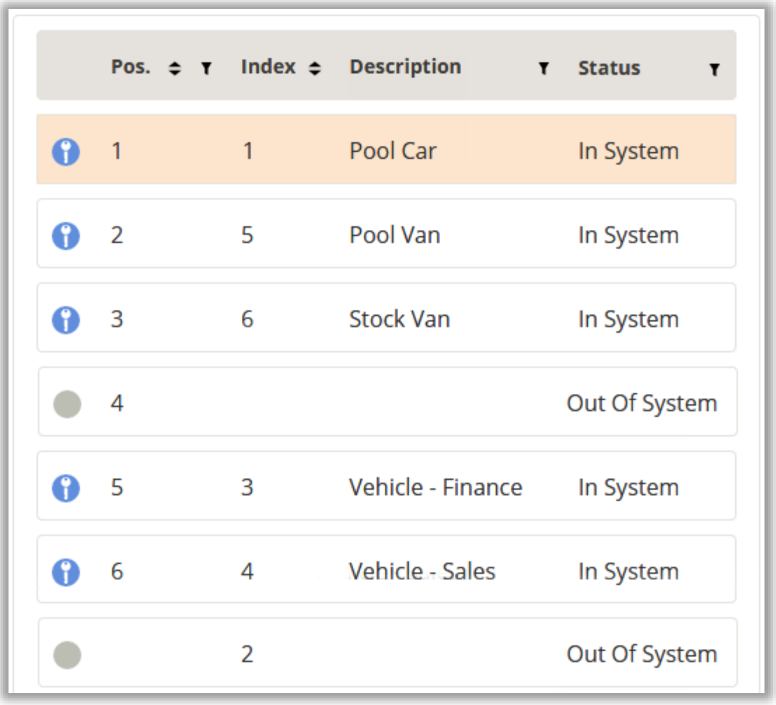


Random Return to Single System

For a Random Return to Single System, each physical position in the system will be represented by a row in the System Viewer Grid. A row will also be displayed for each iFob that is not in the system.

When an iFob is removed from the system, its position will remain but its icon will turn grey to show that the iFob is not in the system. A new row will then be added to the bottom of the grid to show which particular iFob has been removed. Its Index, Description and Status will also be displayed. This is shown in the example below.

The iFob in position 4 has been removed from the system. A new row is created at the bottom of the grid reflecting its current status.



	Pos.	Index	Description	Status
	1	1	Pool Car	In System
	2	5	Pool Van	In System
	3	6	Stock Van	In System
	4			Out Of System
	5	3	Vehicle - Finance	In System
	6	4	Vehicle - Sales	In System
		2		Out Of System

5.2.2 TOOLBAR BUTTONS

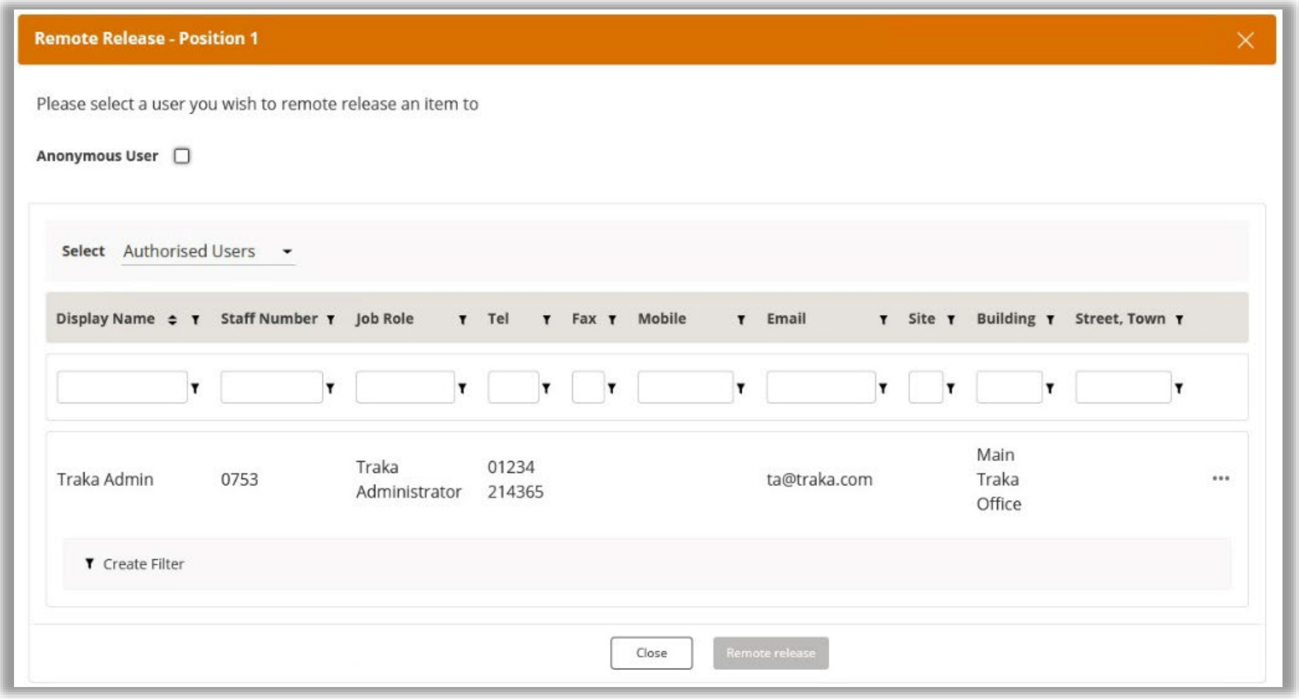
Selecting the ... **Ellipsis** button on the Toolbar will open the **Actions Menu**

5.2.2.1 REMOTE RELEASE

This option allows you to remotely release an iFob/Item or open a locker compartment door from the system for a user. Clicking the Remote Release button will open a window, which will prompt you to select a user to release an item to. Simply highlight the desired user and select Remote Release. Alternatively, you can select the 'unknown user' tick box if you wish to release the iFob/item to a user who is not in the database.

You have the choice to release it to both users who do have access to the iFob/item, and users who do not.

The pop-up window will now give a real time update of the removal process. The door on the Traka Touch system or Locker System will now open and prompt the user to remove the iFob/item.



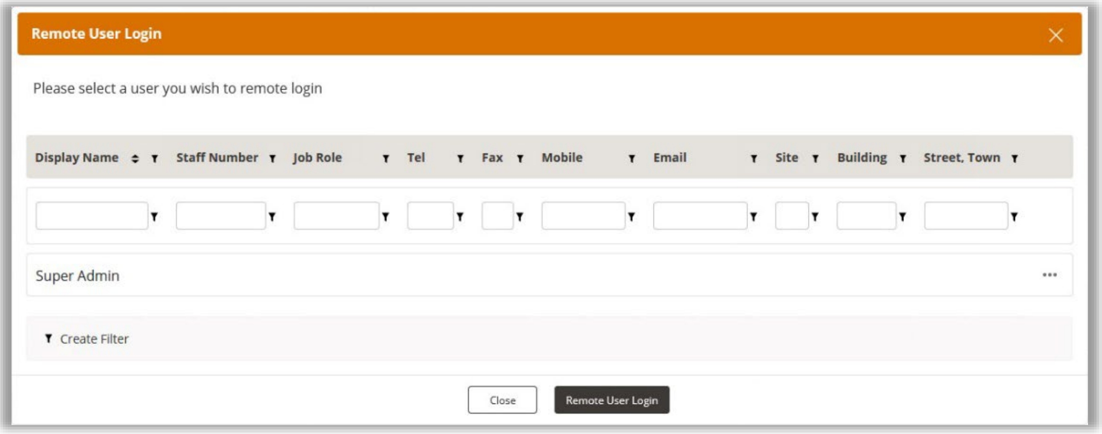
NOTE: When the Item Allowance limit has been reached for a non-Anonymous user, a TrakaWEB Admin user may remotely release more items to the user from that same system effectively overriding their Item Allowance. This is achieved via the I Know What I Want screen when the user has been remotely logged in.

NOTE: Remote Release to a Traka Touch system will not be possible if a System Lock Out has been initiated. For further information on System Lock Out, please refer to UD0258 – Traka Touch Pro User Guide.

5.2.2.2 REMOTE USER LOGIN

This option allows someone using TrakaWEB to remotely log another user into the system. Selecting this icon from the Actions Menu will present the Web user with a pop-up box allowing them to select a user to allow access to the system.

If the user has access to only items, the system will display the item selection screen and automatically open the system door (on Key Cabinets). If the user has admin/report permissions, they will be given an option to remove items or enter the admin/reports menu etc.



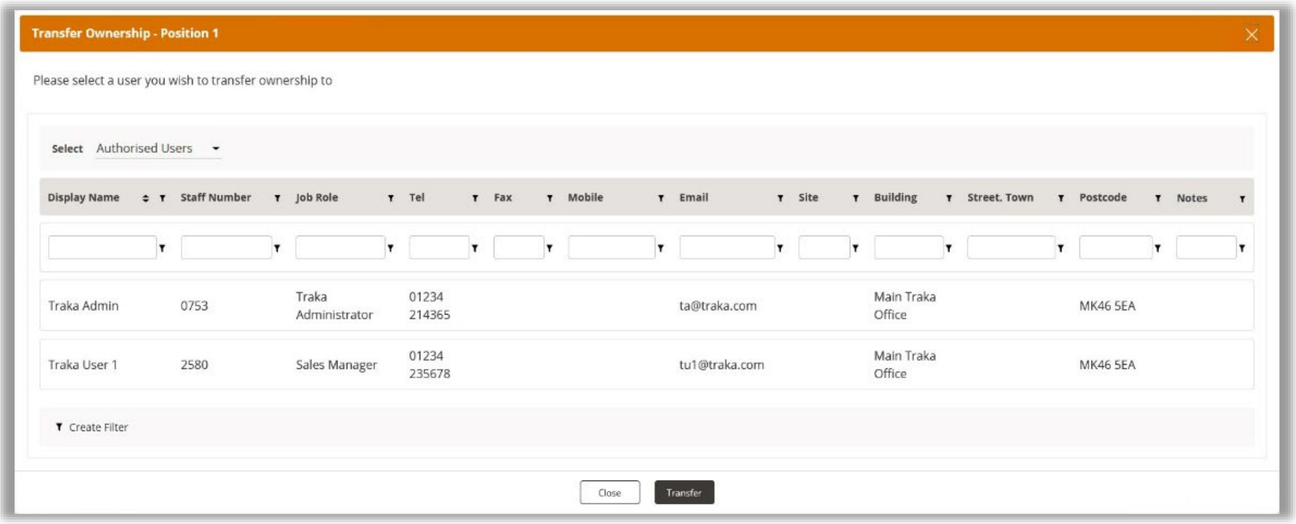
NOTE: Remote User Login to a Traka Touch system will not be possible if a System Lock Out has been initiated. For further information on System Lock Out, please refer to UD0258 – Traka Touch Pro User Guide.

5.2.2.3 TRANSFER OWNERSHIP

This option allows you to transfer the ownership of the item(s) in the selected position to another user whilst the item(s) is/are already out of the system. Clicking the Transfer Ownership button will open a window, which will prompt you to select a user to transfer to. Simply highlight the desired user and select Transfer.

You have the choice to transfer it to both users who do have access to the item, and users who do not.

The pop-up window will now display the details of the transfer process. TrakaWEB will now show that the user who currently has the item out of the system has changed.

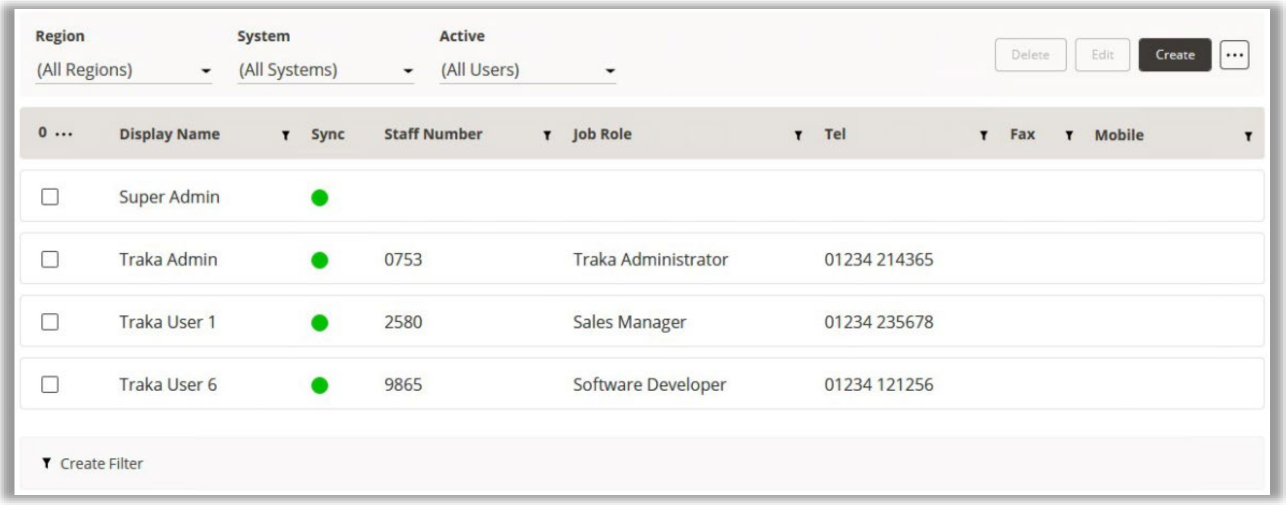


5.3 USERS

Within TrakaWEB, users can be added, edited and deleted. This may be achieved on a user-by-user basis as outlined in this section, or multiple users can be edited at once by using the Multi-Select/Multi-Edit feature.

5.3.1 USERS LIST

From the Navigation Menu select the 'Users' tab. If you already have users set up in your Traka Touch system, then this list will be populated with all of those users along with all the other users in the database. If you have not added any users to your system, you will need to Add Users.



Region, System & Active Filters

When looking at the user list, you can filter which users are displayed by using the Region, System and Active drop-down filters located on the left-hand side of the Toolbar. Clicking the arrow button next to each field will show you a list of selectable filter types, depending on what has been configured. For more information, please refer to the Regions and Systems topics.

Sync Column

This column shows the current synchronisation status of the user to the currently selected system. There are three main icons that indicate what state the synchronisation is in. A green LED indicates that the user is fully synchronised with all Traka Touch systems they should be. A red LED indicates a sync failure, check that the system is switched on and can communicate with TrakaWEB. Lastly, a rotating loading graphic shows that TrakaWEB is attempting to synchronise the user with the Traka Touch System.

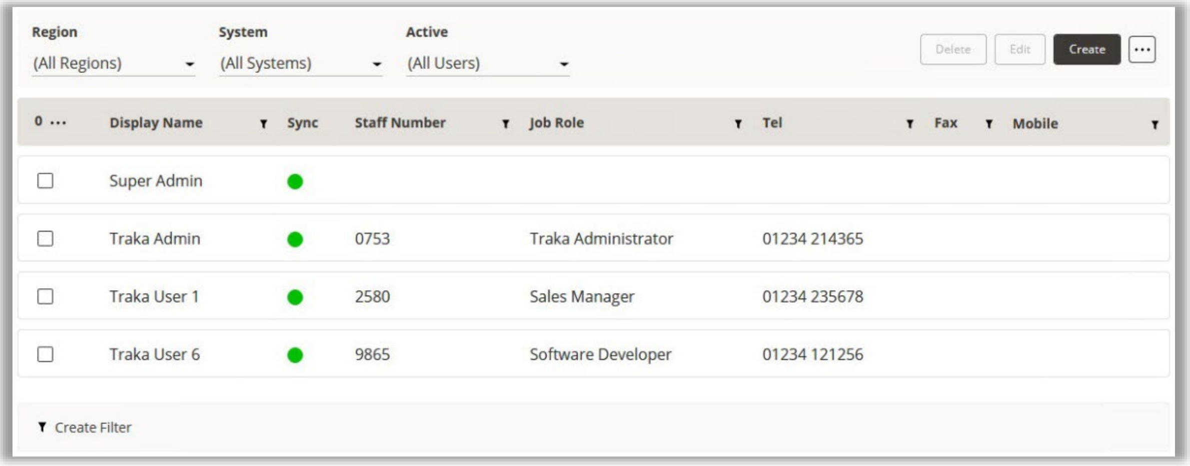
Show/Hide Grid Columns

Throughout TrakaWEB, there are many grids that display important information for the page you are currently viewing. For example, the user list will automatically display the default user fields e.g., staff position, telephone number, fax number etc. The Show/Hide Grid Columns button located in the Customise menu allows you to add or remove fields/columns of your choice to the grid. Every grid is different and will provide different fields to add to the grid. The user list will allow you to add any or all of the eleven user detail fields.

NOTE: The 'Show/Hide Grid Columns Chooser' in the 'Credentials' tab within a User's details is different to all other grids. This Column Chooser uses check boxes to select the required grid columns rather than a drag/drop Column Chooser used in other grids.

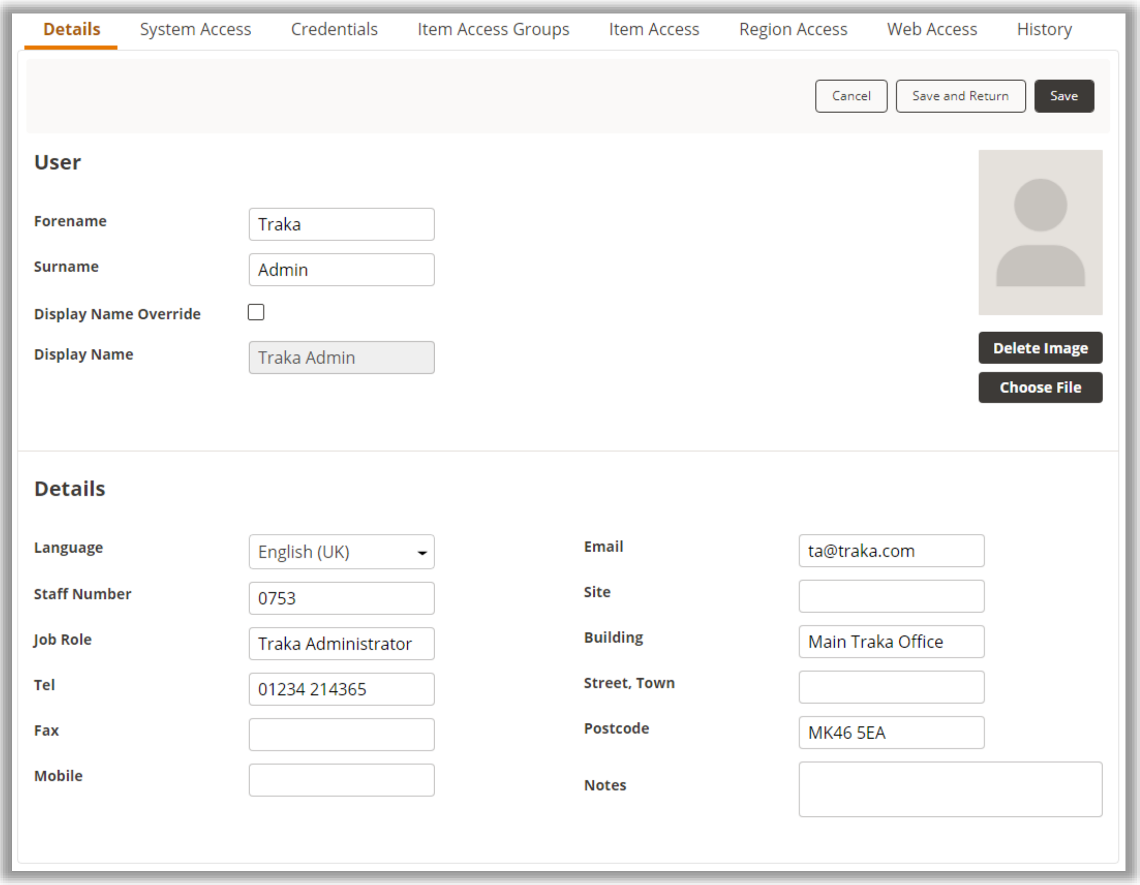
5.3.2 USER DETAILS

The user details window allows you to add and edit user details. From the ribbon toolbar, select the user's icon. If you have already got users set up in your Traka Touch system, then this list will already be populated with all those users.



Details

Here you enter general information about the user such as name, telephone number, language etc.



Forename & Surname
Enter the name of the user. It is essential that these fields be completed.

Display Name Override
If this option is enabled, then you can add/change how the user's name is displayed on screen at the Traka Touch.

E.g., if the Forename & Surname fields have your full name ‘Traka Admin’, you could enable Display Name Override and enter ‘Traka Admin – Traka Administrator’.

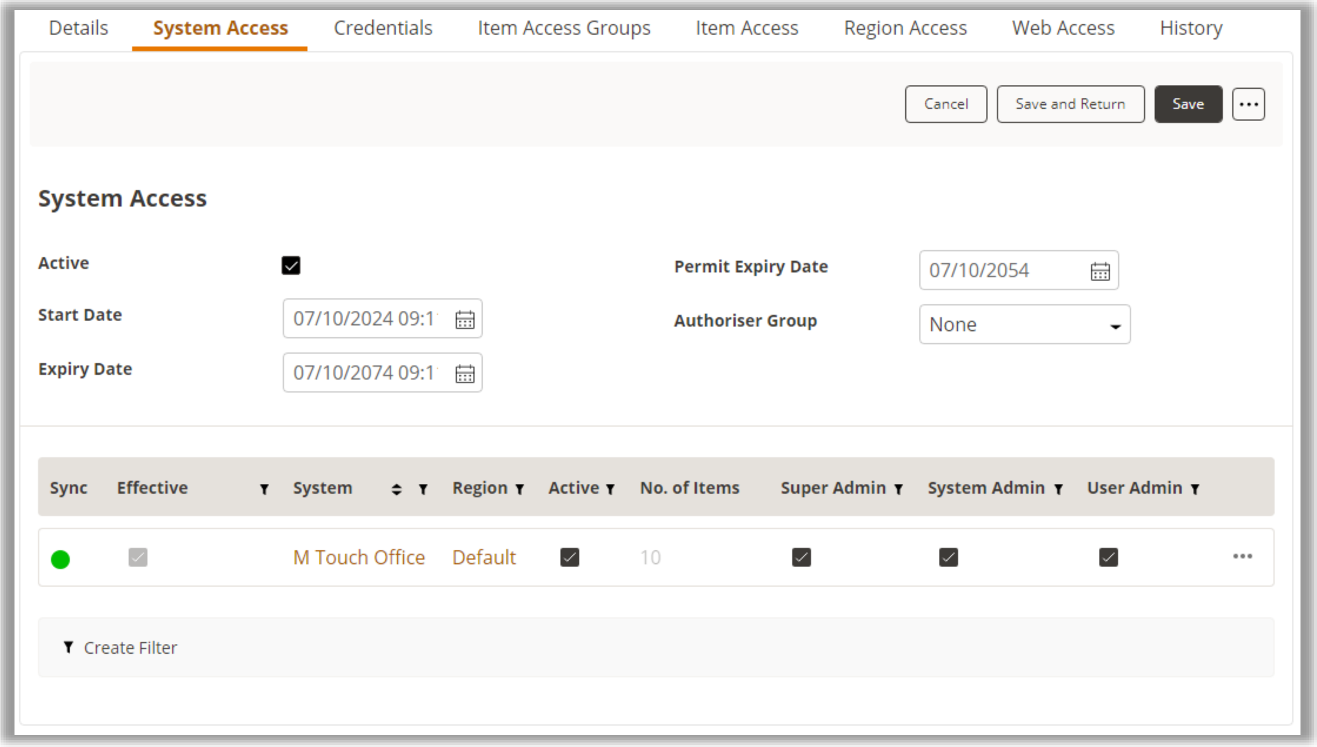
Language
When users identify themselves to the System, the instructions on the touch screen will be displayed in the selected language. If the default language is selected, then the default language of the Traka Touch System will be displayed.

User Details
There are eleven detail fields available to store details about the user. Each field will have a default heading that is assigned when you install TrakaWEB, for example, email. You can change the headings of each field from the User Fields page.

User Picture
Here you can add a picture of the user. Once selected, this image will display next to their name.

System Access

Here you define the Active status of the user, define the systems which the user has access to, and set any relevant Administration permissions.



Active
Tick this selection box on or off to make the user active or not active as a TrakaWEB-registered user.

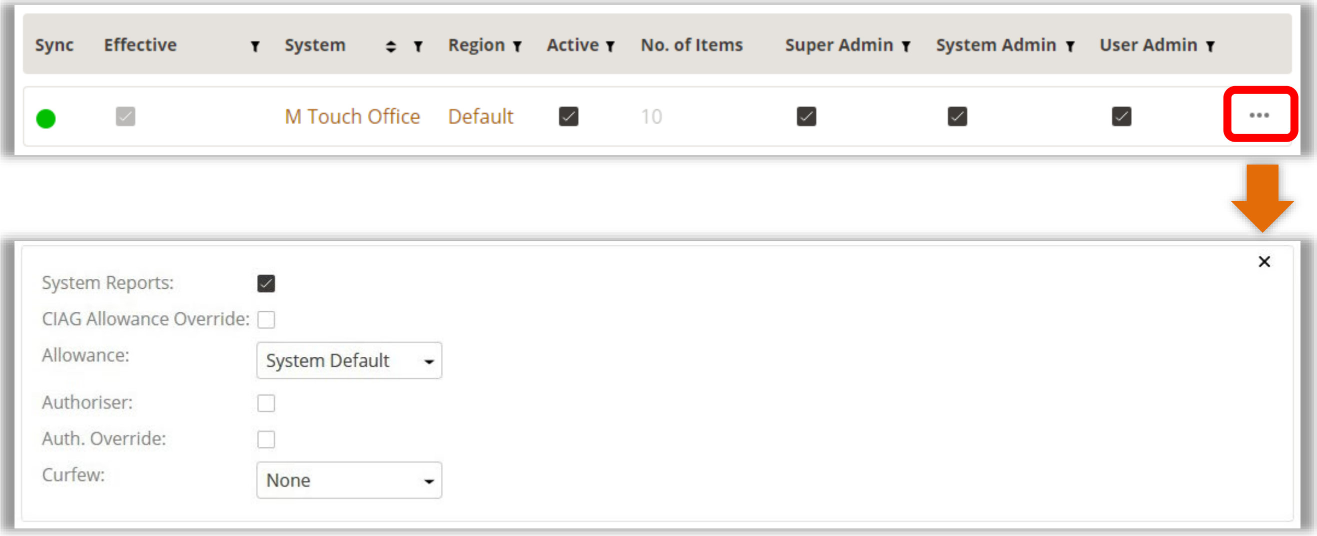
Start & Expiry Date
Select the start & end date and time for the when the user is active.

Permit Expiry Date
Certain users may have licences, certificates or permits that require being kept up to date. Setting an expiry date in this field will show you when the users permit(s) will expire.

Authoriser Group
When using Authorisers, they may be added to different groups depending on authorisation requirement. You may then select from the drop-down menu, the Authoriser Group that you wish to assign the user to.

System Access Grid
The system access grid will display all systems across every region within the database. From here, you can select which systems the user has access to as well as Admin permissions. Selecting the Ellipsis button will show a menu with additional software permissions such as Reports, Allowance and Curfews. These options may be refined by assigning roles to users through Software Permissions Groups. This will in turn reflect the user’s roles on Traka Touch. For more information on User Roles for Traka Touch, refer to **UD00258 – Traka Touch Pro User Guide.**

NOTE: The System Access Grid will display different options depending on which feature options are enabled on the system. The example below is typical of a grid with no feature options enabled.



System Access Grid

Effective
The tick box named Effective is related to the Active column. When you tick the Active checkbox, the user's information will be synchronised with the system. Once that has completed, the Effective checkbox will be ticked automatically.

System
This column will display the name of the system.

Region
This column will display the region to which the system belongs.

Active
Check this box to make the user active and allow them to use the chosen Traka Touch system, e.g. access the system, remove items, run reports etc (anything the user is permitted to do).

No. of Items
This column will show how many items the selected user currently has access to in each system.

Super Admin
The Super Admin role will grant/revoke the user with all the Admin roles regardless of any of them being selected or deselected.

System Admin
The System Admin Role will provide a grant/revoke ability to administer Systems settings, including doors admin if the system is a locker, but will not enable to edit user records or access and administer items.

User Admin
Selecting this option will provide an Admin role to grant/revoke the ability to edit User records such as adding or removing users or assigning items to users.

Items Admin
Selecting this option will add an Item admin role which will grant/revoke the ability to administer Item records, enabling a user to access items or replace damaged or broken iFobs.

Additional Permissions:
Additional permissions are available upon expanding each of the system's panel by clicking on the **Ellipsis** button next to each system.

System Reports
Selecting this tick box will allow the user to view & run reports at the Traka Touch system.

CIAG Allowance Override
Selecting this tickbox will enable a user to override any Common Item Access Group allowance settings.

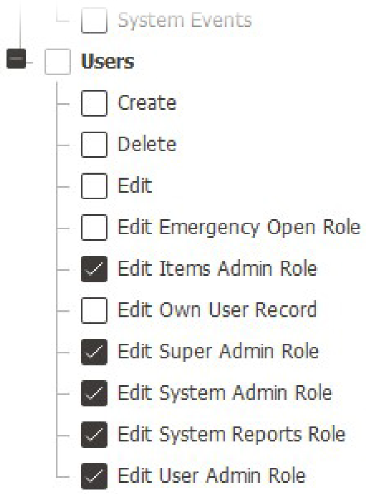
Allowance
Allowance can restrict the total number of iFobs/items users can have out of the system at any one time. Using the drop down selection box, you are able to select a quantity or alternatively, select unlimited for no restriction. The maximum will be however many iFobs/items you have in the selected system.

Authoriser
Selecting this option will enable the user to authorise certain activities such as another user removing items. Please refer to the Authoriser section for more information.

Authorisation Override
Selecting this option will enable an admin user to self-authorise. If an item requires authorisation, a user with this option ticked will bypass the authorisation process.

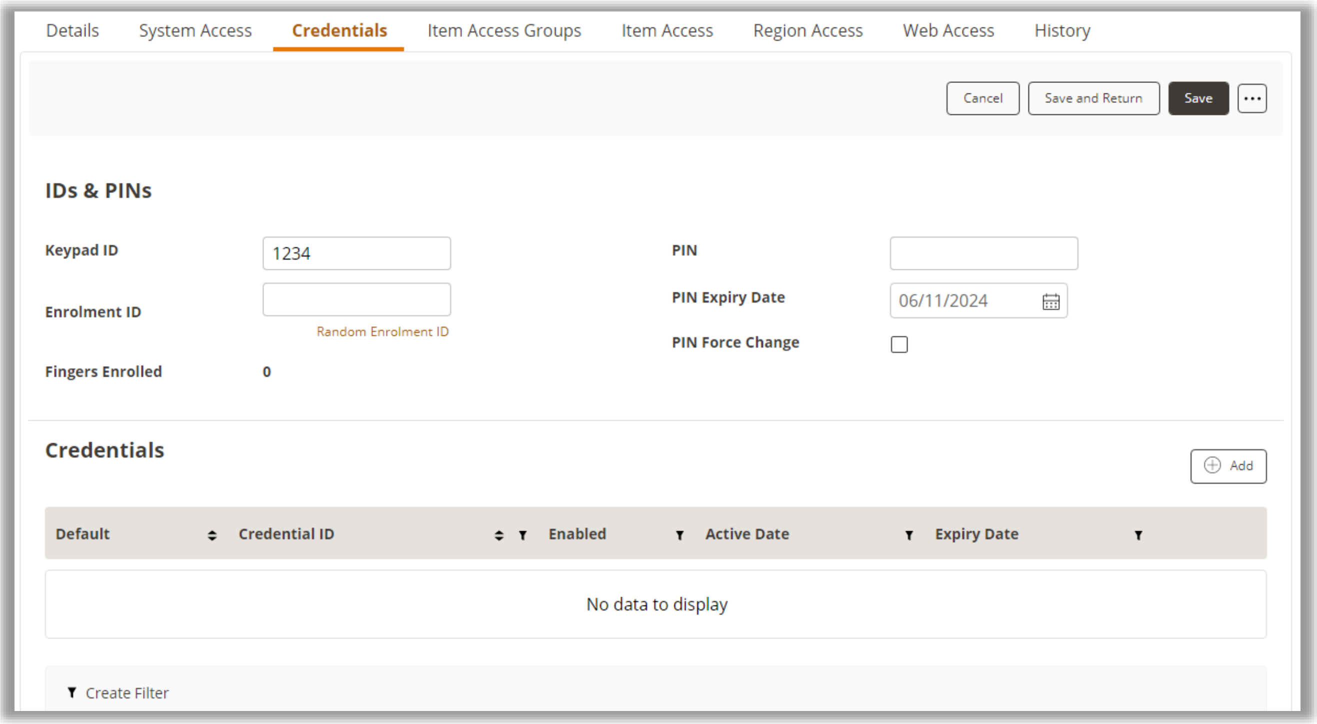
Curfew
Curfews are used to reduce the amount of time an iFob/item is out of a system, or how long a user can have an iFob/item in their possession. There are two different types of curfew; Relative & Absolute. You can set these curfews against both users and iFobs/items. This is a very useful feature within businesses that have shift patterns and users taking many iFobs/items from various systems, as it will highlight if they are not returned to the system by the end of a users' shift. Please refer to the Curfews section for specific details.

NOTE: Your ability as a TrakaWEB administrator user to manage each of the Admin Roles on the System Access Grid can be enabled or disabled through Software Permissions Groups as shown below.



Credentials

Here you can assign a user's credentials to enable them to log into the Traka Touch system(s).



NOTE: There are two levels of access when using a Traka Touch system: Primary and Secondary. A primary level of access can be one of the following: Credential ID, Keypad ID or Fingerprint ID. This means any one of those forms of ID will allow you access to the system. The secondary level of access is an optional PIN (Personal Identification Number). If a user has a PIN, they will be required to enter this at the system following the input of their primary access (Credential ID, Keypad ID or Fingerprint).

Keypad ID
Here you can input your Keypad ID number. This is the primary ID number that will grant the user access to the system.

Enrolment ID
Enrolment ID is used in conjunction with either a Card Reader or the Sagem Fingerprint Reader. This feature allows you to set a temporary enrolment number that can be emailed to a user so that when they enter their enrolment number at the system, they will immediately be prompted to swipe/scan their preferred credential (e.g. access card) or enrol their fingerprint. Clicking **Random Enrolment ID** below the **Enrolment ID** box will automatically fill this field with a random six-digit number.

NOTE: The user will need to have been setup for Email Notifications in the Admin App.

PIN
Here you can input your PIN (Personal Identification Number). This is a secondary level of access that can be used in addition to a Keypad ID, Credential ID or Fingerprint. E.g., if you have a Credential ID as your primary level of access, when you log into the system you will be prompted for your PIN after swiping your credential.

PIN Expiry Date
This field allows you to enter a date for when the user's PIN will expire. After this date, the user will be required to change their PIN the next time they access the system. If you wish the PIN to forever remain active, leave this area blank.

PIN Force Change
Select this option to force the user to have to change their PIN. If selected, the user will need to change their PIN the next time they access the system.

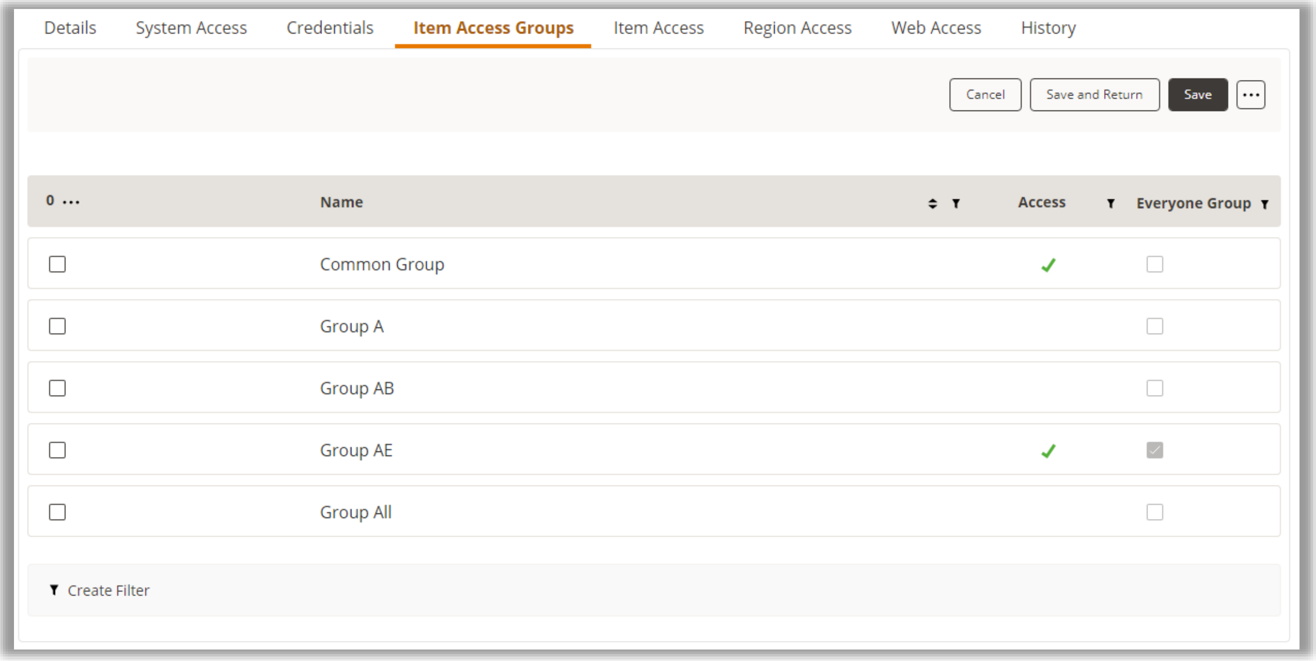
Fingers Enrolled
Here it will display how many fingers the user currently has enrolled to the system. This is only valid for systems using the Sagem Fingerprint reader.

Credentials Grid
Here, you can add, edit or delete the credential(s) associated with a user.

NOTE: It is possible to assign more than one credential to a user if the Multiple Credentials non-cost feature option has been enabled. Please see the Multiple Credentials section for more information and guidance on how to assign multiple credentials to a single user.

Item Access Groups

You can also grant or revoke access to an entire group of items by using the Item Access Groups section.

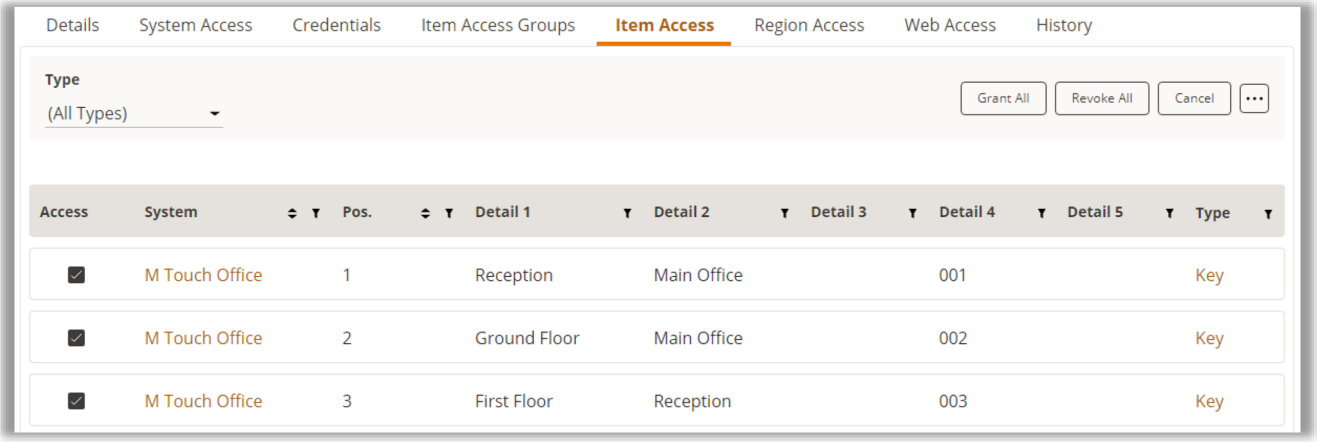


Item Access

Here you can grant/revoke access to items across all systems and regions.

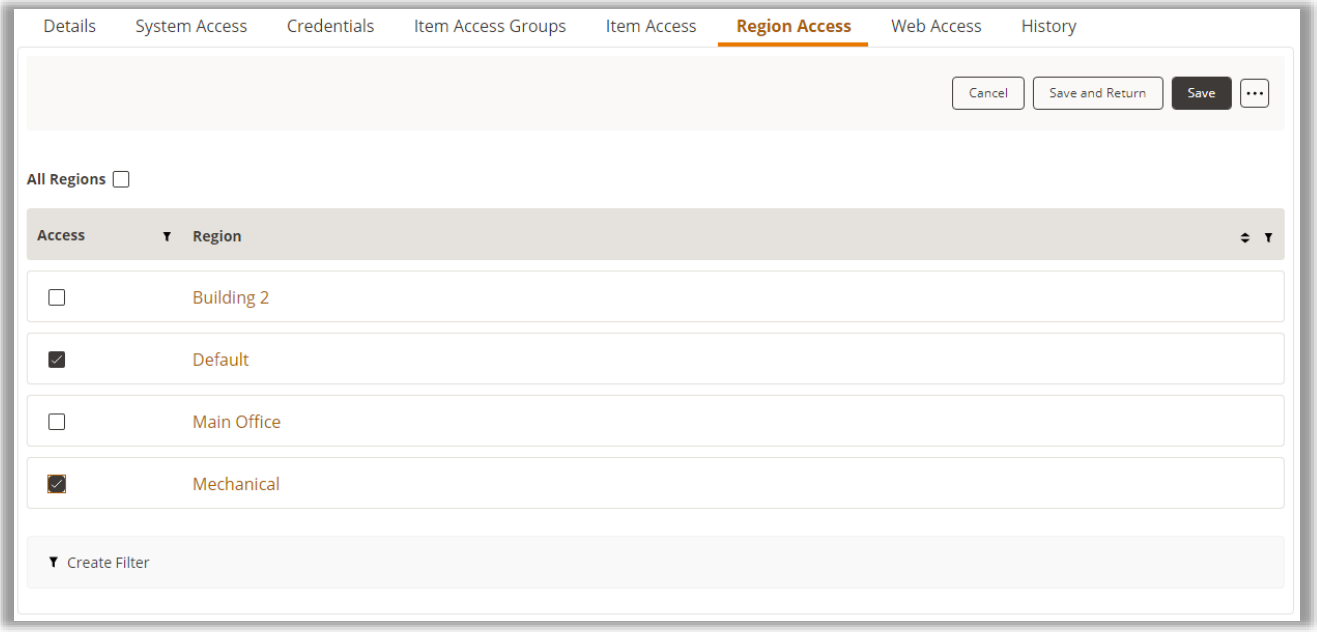
Item Access Grid

Simply checking the Access box next to the desired position will allow the user to remove that item from the system. Selecting the Grant All button will tick all the access boxes allowing the user access to everything. Selecting 'Revoke All' will untick everything removing all access respectively.



Region Access

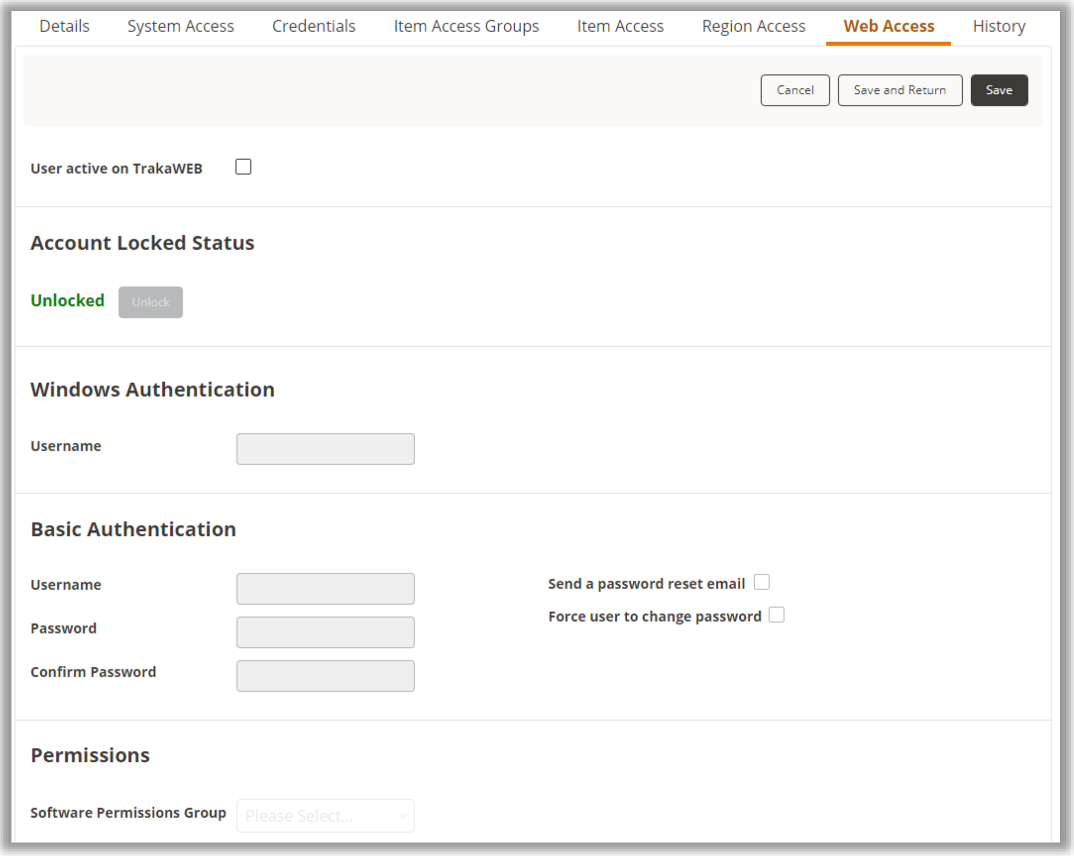
Here you can place the user into a Region. Simply tick the access box on the left of the region you wish the user to belong to.



Selecting the **All Regions** tick box will put the user in all regions automatically.

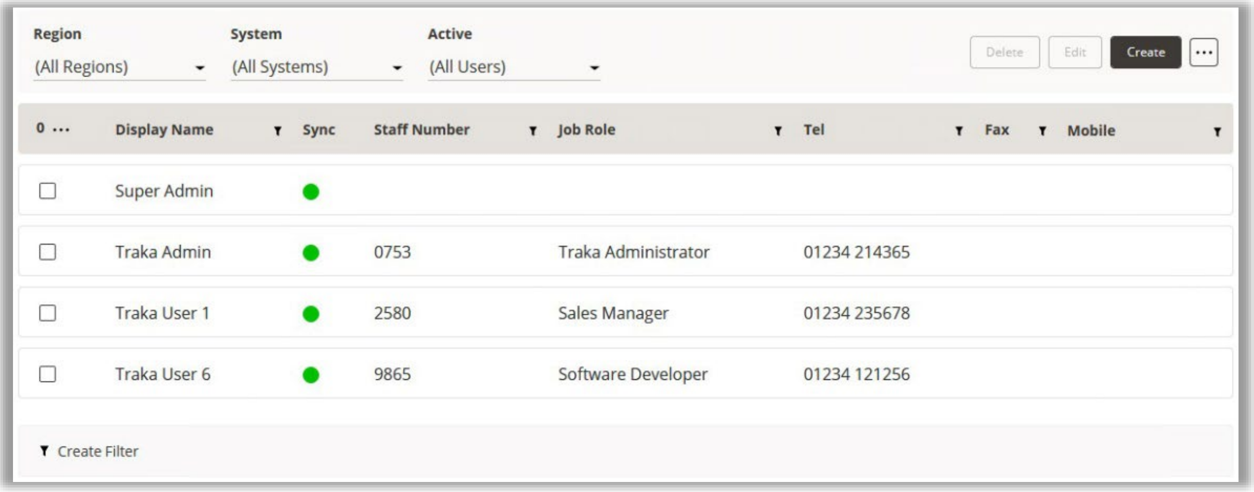
Web Access

In the Web access tab, a user can be given a separate username and password that will allow them to log into TrakaWEB, either with Windows Authentication or Basic Authentication. It is important to assign a user to a Software Permissions Group so that they are able to log into their TrakaWEB account. The **User active on** TrakaWEB checkbox, will only be available if a user has been assigned to a group. Disabling this option will not permit a user to log in. If the Password Notification and Email Configuration have been set up in the Admin App, a user may be sent an email to reset their password. For more information on Web Access groups, please see the Software Permissions Groups section. For more information on TrakaWEB Basic Authentication Password Complexity Rules, please refer to **TD0216 – TrakaWEB Version 4 Installation & Configuration Guide.**



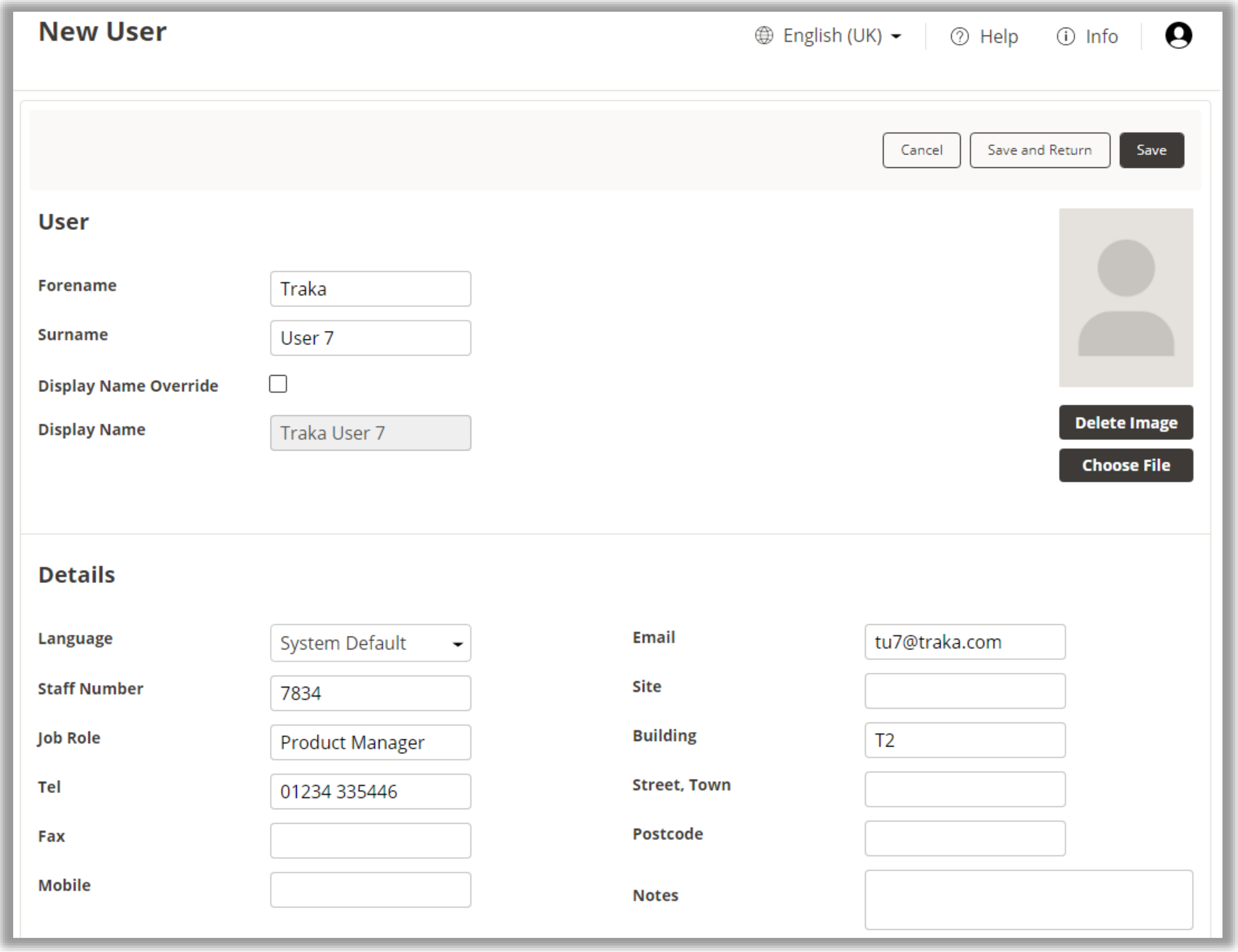
5.3.3 ADDING USERS

1. From the Navigation Menu select **Users**. If you already have users set up in your Traka Touch system or they have been added here before, then this list will already be populated.

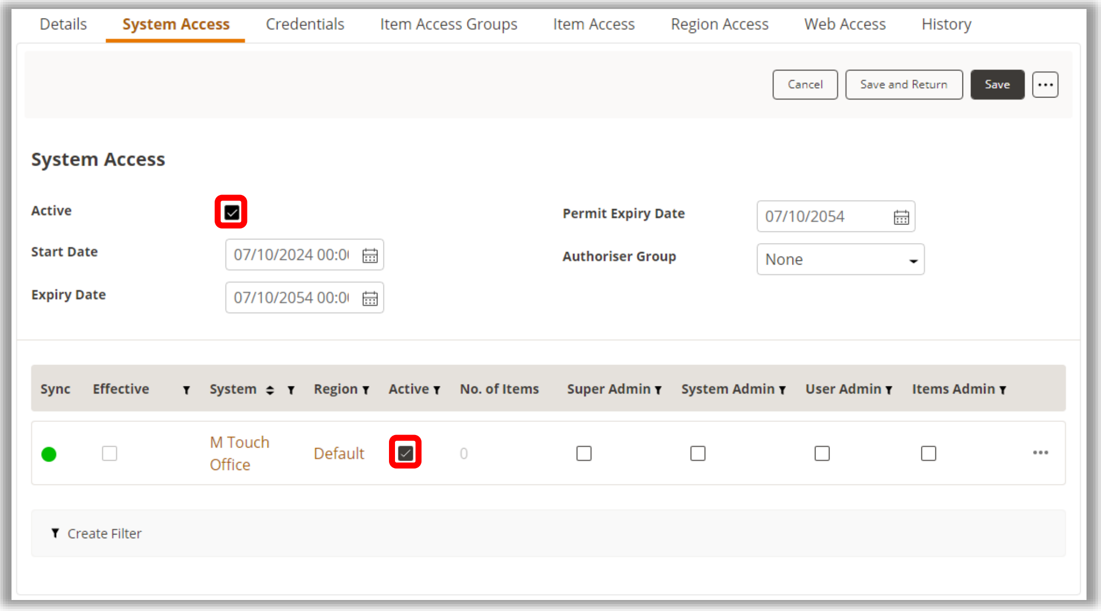


2. To create a new user, click the Create button.

3. The new user record will now open. By default, the User Details page will open. Fill in the required fields, click **Save** and then proceed to the next step.

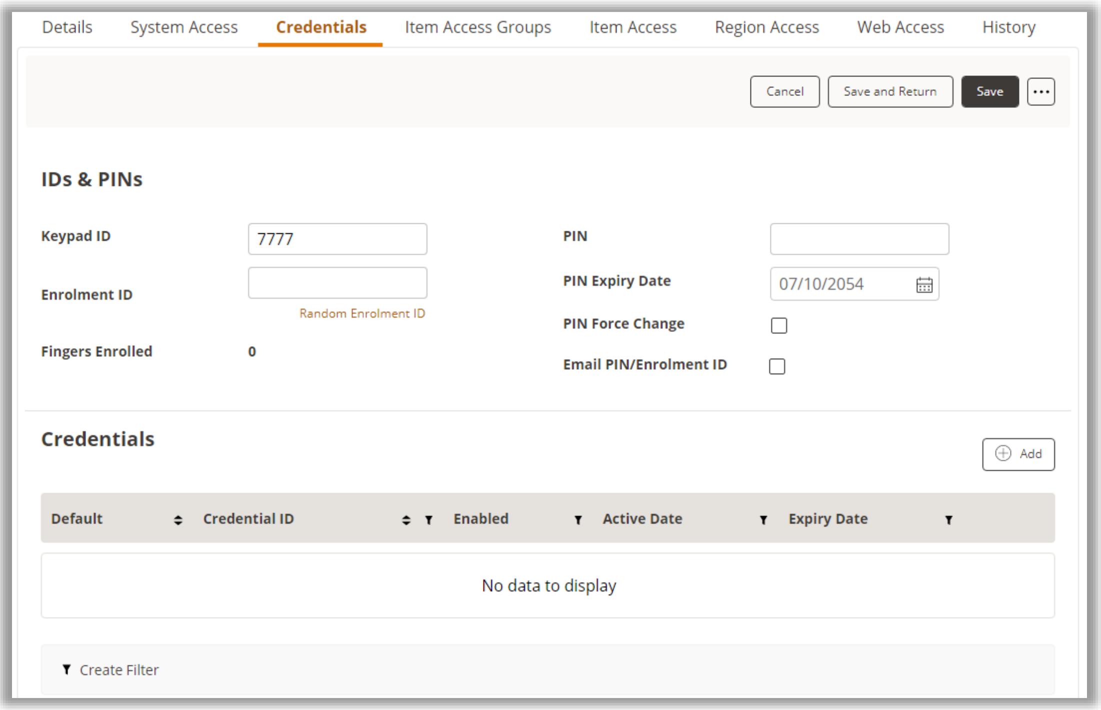


4. Now click on the System Access tab. Here, you can toggle the Active status of the user, set their start and expiry date, and choose the system they have access to and any administrator settings if applicable.



NOTE: With the release of TrakaWEB Version 4.5, the input fields for IDs & PINs has moved to the Credentials tab. Card ID has been replaced by the Credentials Grid. On older versions of TrakaWEB, you will find this information under the System Access tab with the required fields to input IDs & PINs.

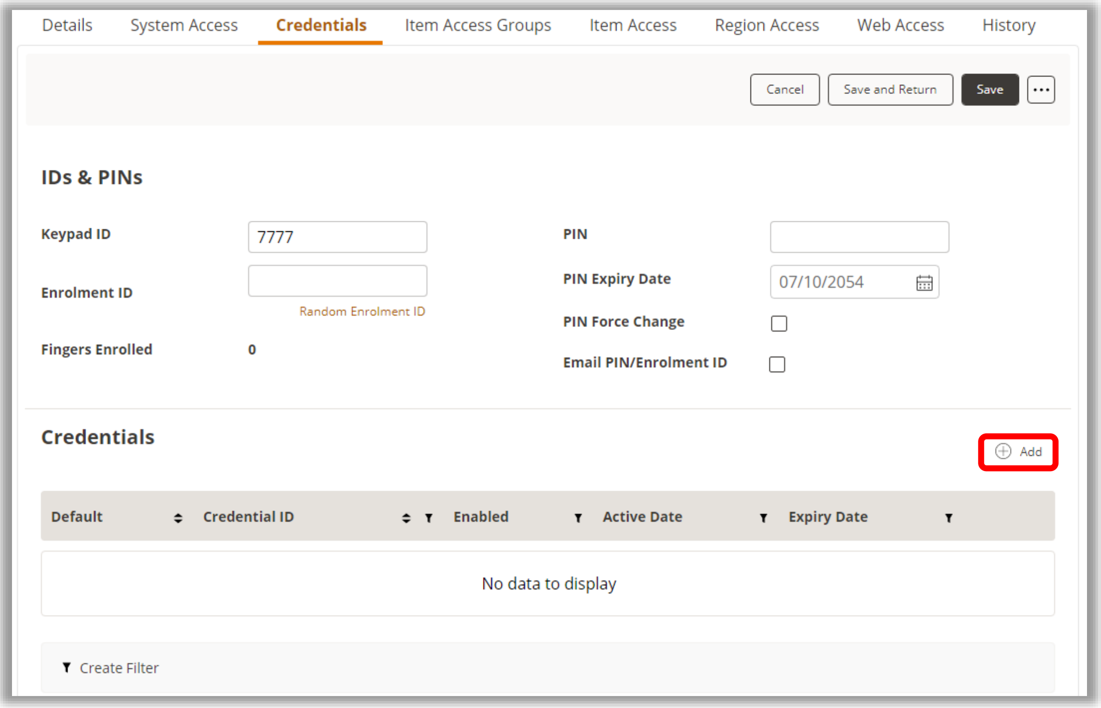
5. Click on the Credentials tab. Here you can assign the Keypad ID, Enrolment ID, a PIN and a Credential for the user.



NOTE: It is possible to assign more than one credential to a user if the Multiple Credentials non-cost feature option has been enabled. Please see the Multiple Credentials section for more information and guidance on how to assign multiple credentials to a single user.

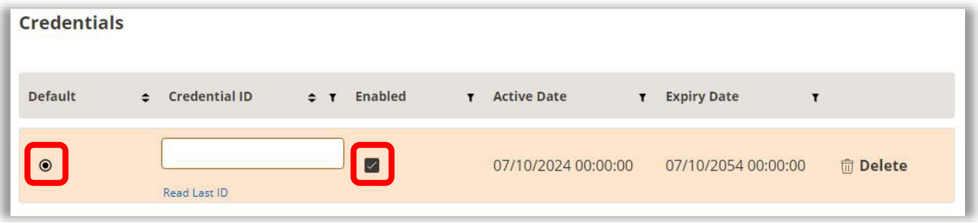
NOTE: The 'Show/Hide Grid Columns Chooser' in the 'Customise' option, found by clicking the ellipsis button, is different to the Show/Hide Grid Columns Choosers in other tabs. This Column Chooser uses check boxes to select the required grid columns rather than a drag/drop Column Chooser used in other grids.

6. If assigning a credential to a user, click the **Add** button. If no credentials need to be assigned (i.e. only a Keypad ID is required), please move on to Step 9.



NOTE: If there are no systems assigned to the user with Multiple Credentials enabled, this button will disappear when the new row appears in the Credentials Grid. However, if the row is deleted before or after saving the new Credential, the add button will return. Please see the Multiple Credentials section for further information.

7. An unpopulated Credential will appear in the Credentials Grid and will be marked as the default credential and enabled.

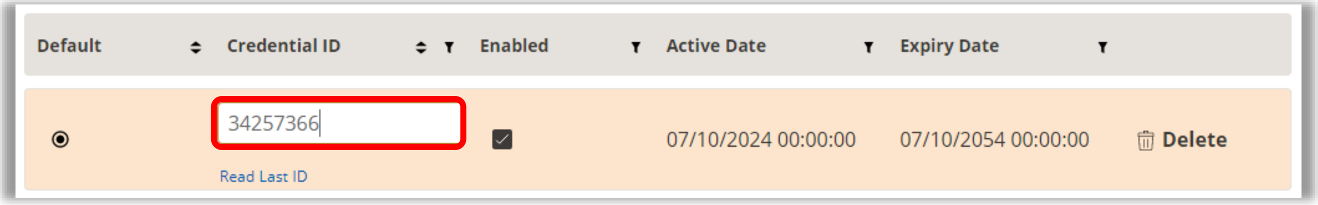


NOTE: The default credential is essential for logging into single credential systems. If Multiple Credentials has been enabled and more than one credential exists for the user, then it is possible to change the default credential. Please see the Multiple Credentials section for further information.

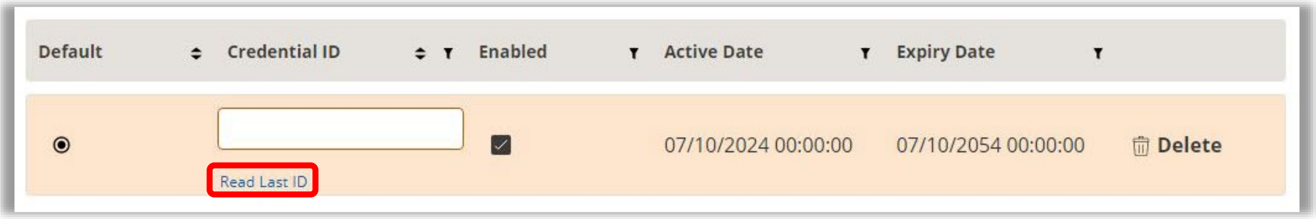
NOTE: The Active Date and Expiry Date will be pre-populated based on the Start Date and Expiry date in the System Access tab. It is possible to edit these dates, but it is not possible to set the expiry date before the start date.

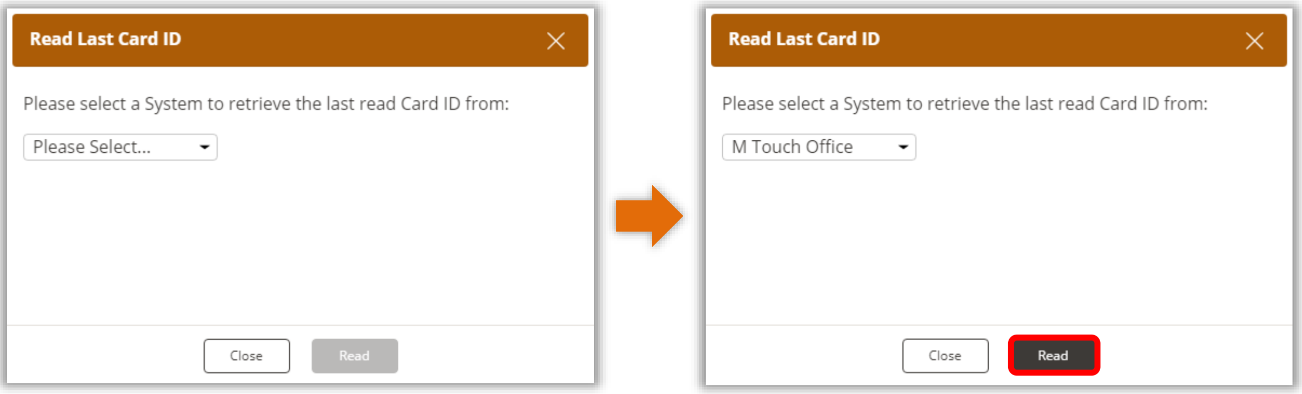
8. Input the Credential ID. There are two ways to populate this information:

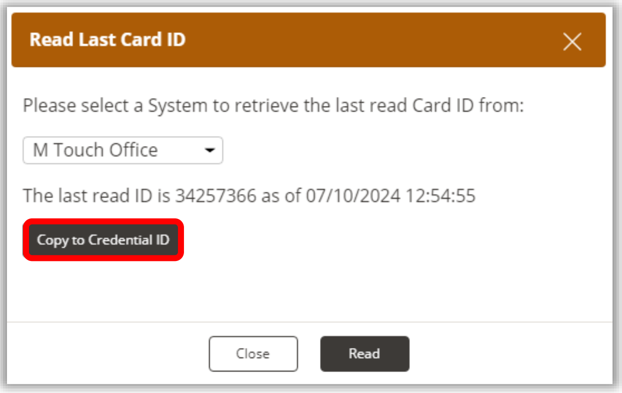
   i. Click in the Credential ID field and type the required ID number.

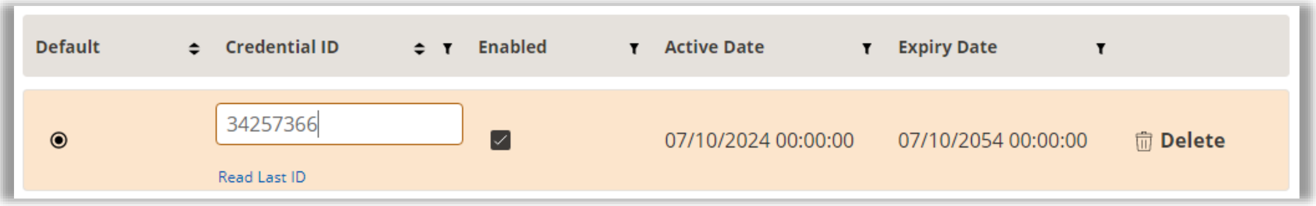


   ii. Click **Read Last ID** to bring up the Read Last Card ID window. Here, you can select a system to retrieve the last read Card ID from. Select the required system and click **Read**. The last read ID will appear, check this is the required ID and click **Copy to Credential ID**. The Read Last Card ID window will close, and you will see the Credential ID field has been populated with the relevant ID.

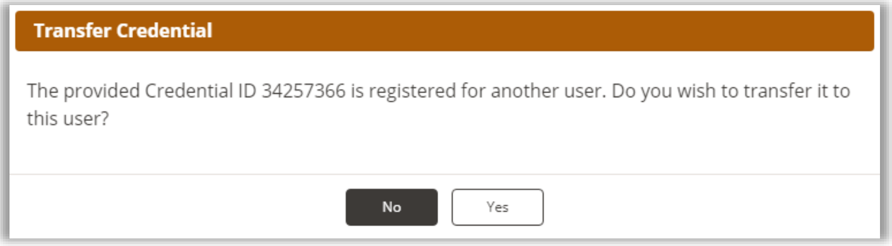


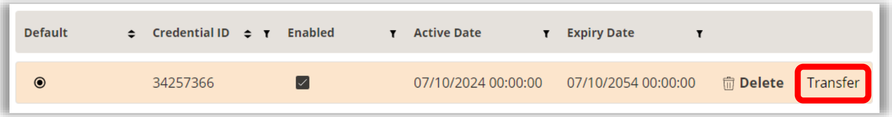






NOTE: TrakaWEB will automatically check the database for duplicate Credential IDs. If a duplicate is found when creating or editing a user, you will be asked if you wish to transfer the ID from one user to another. Clicking 'No' will prevent the Credential ID field from being saved and require the ID to be changed. Clicking 'Yes' will input the Credential ID and the word 'Transfer' will appear on the right-hand side. The Credential ID will not be transferred until you click Save. Once saved, the Credential ID will be removed from the previous user and migrated to the user you are creating.



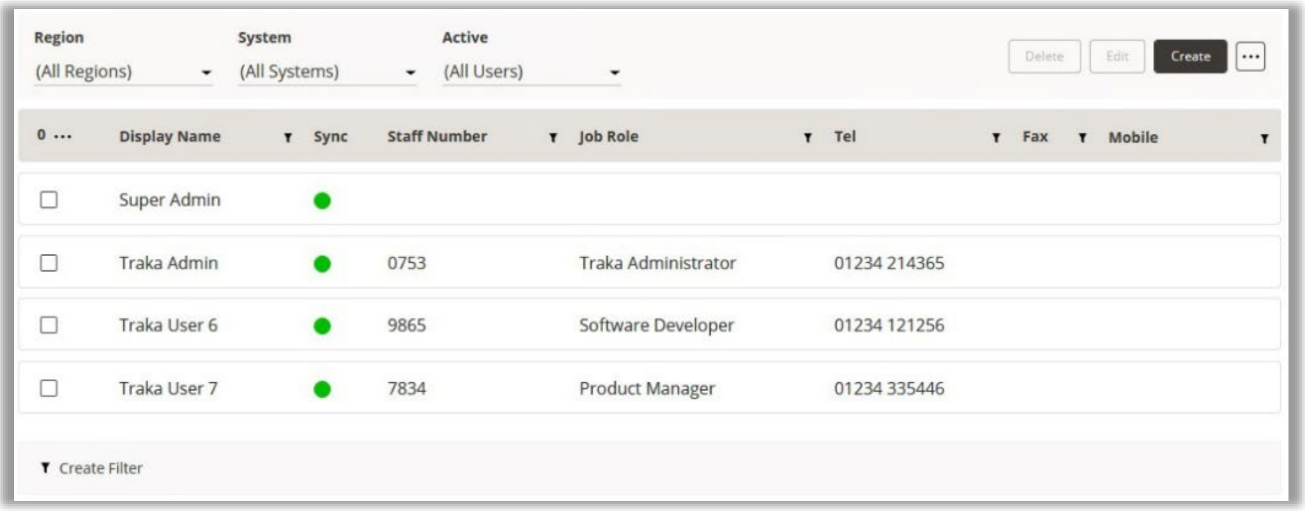


NOTE: A Credential ID cannot be edited once saved. It must first be deleted, and a new Credential created. However, all other fields in the Credential Row can be edited.

9. Continue to input the appropriate details in the relevant tabs at the top of the page. For more information, please review the User Details section.
10. When you are finished, click the Save and Return button to go back to the user list. To add more users, repeat this process from Step 2.

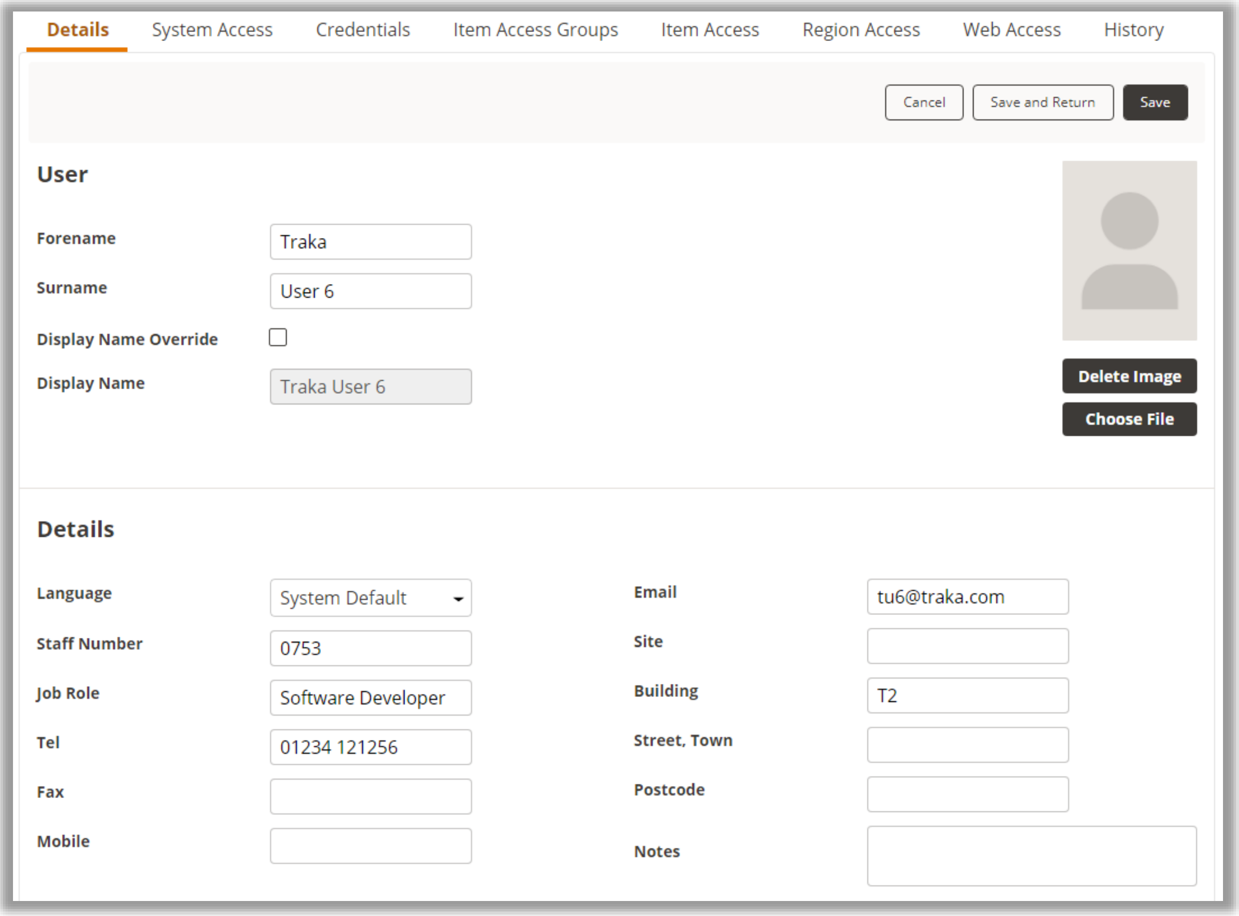
5.3.4 EDITING USERS

1. From the Navigation Menu, select **Users**. If you already have users set up in your Traka Touch system or they have been added here before, then this list will already be populated.



2. Highlight the desired user and click the **Edit** button. Alternatively, you can double click the desired user.

3. The selected user record will now open. Edit the required details. For more information, please review the User Details section.



NOTE: A Credential ID cannot be edited once saved. It must first be deleted, and a new Credential created. However, all other fields in the Credential Row can be edited.

4. When you are finished, click the **Save and Return** button to go back to the user list. To edit more users, repeat this process from step 2.

NOTE: A User with the edit User Permission will be able to access the History tab to view an audit trail.

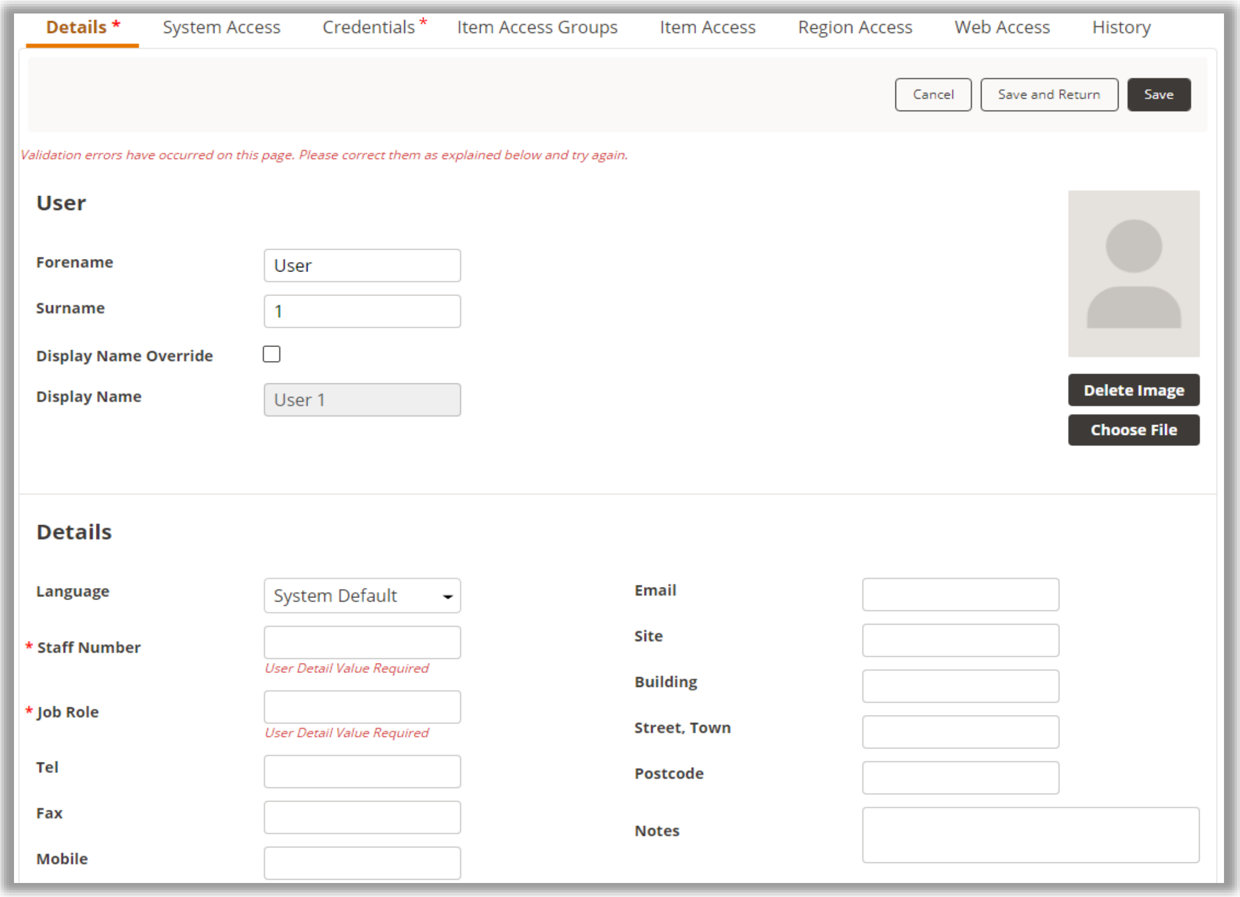
5.3.5 EDITING USERS WITH VALIDATION ERRORS

Validation errors may occur over one or more pages in TrakaWEB for users being imported from a previously standalone system. Typical examples could be user information for mandatory fields being absent as it is not stored on the Touch system, duplicate users or a user sharing the same primary ID as an existing record.

At the Users page in TrakaWEB, a red asterisk will appear against the tab or tabs that contain user validation errors.

It is possible to navigate through each tab and resolve any validation errors that exist.

A message will be shown on the affected page stating that there are validation errors, and the affected mandatory fields will be marked with a red asterisk (*) as shown in the example below.



Once the validation errors have been resolved, click on the **Save** button to continue.

5.3.6 DELETING USERS

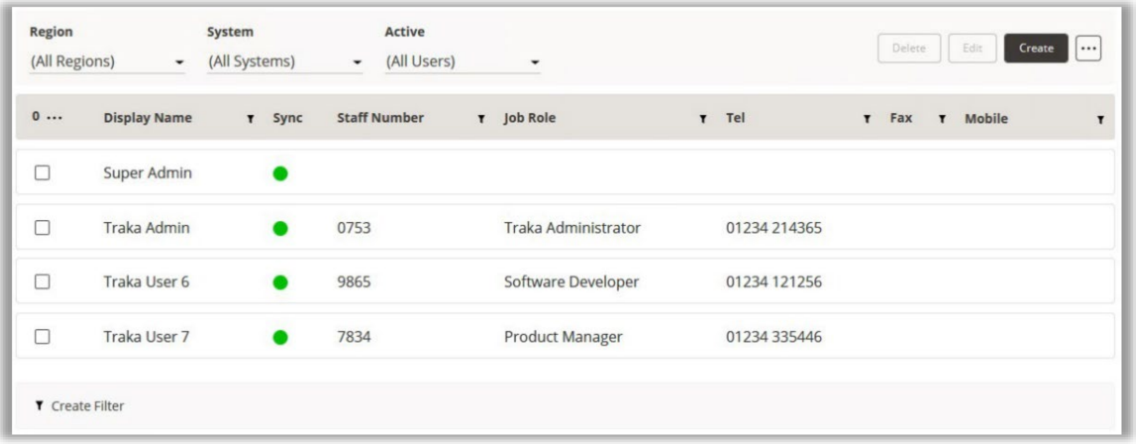
GDPR Statement: To retain the audit history, such as a sequence of activity that has affected a specific operation, procedure, or event. It is recommended that the User details are maintained & not fully deleted from the database. With this in mind, the preferred option to remove a User from a Traka system is as follows:

- **Define the user as inactive so that the user cannot use the Traka system(s) any more**
- **Replace the User 'Forename' & 'Surname' with non-specific details such as 'Former employee#1'**

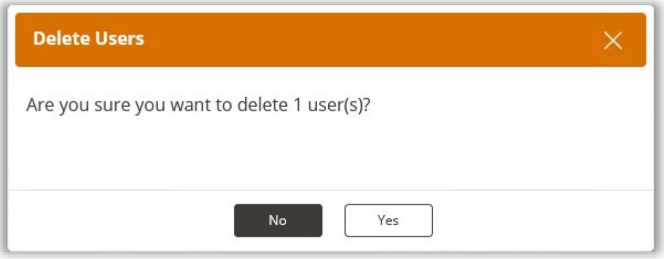
It is also recommended that a backup of the database be made after the above changes are completed and all previous database back-ups destroyed.

This process also maintains compliance with the 'General Data Protection Regulations' (GDPR).

1. From the Navigation Menu, select **Users**. If you already have users set up in your Traka Touch system or they have been added here before, then this list will already be populated.



2. Highlight the desired user and click the Delete button.
3. A message window will appear asking you to confirm the deletion of the selected user. Click **Yes**.

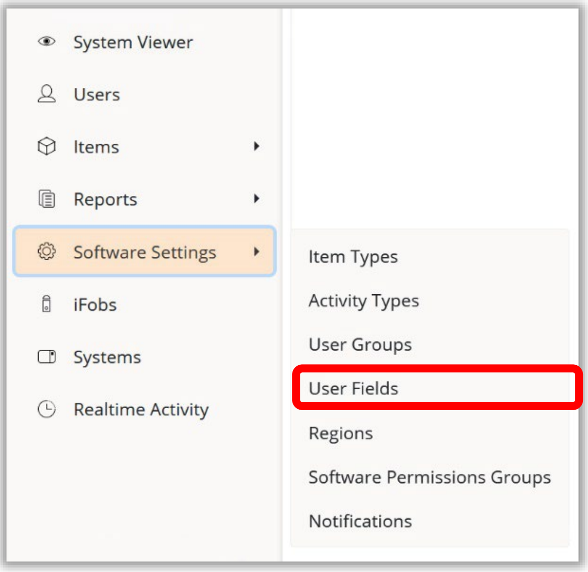


4. The user will now be permanently deleted and disappear from the user list.

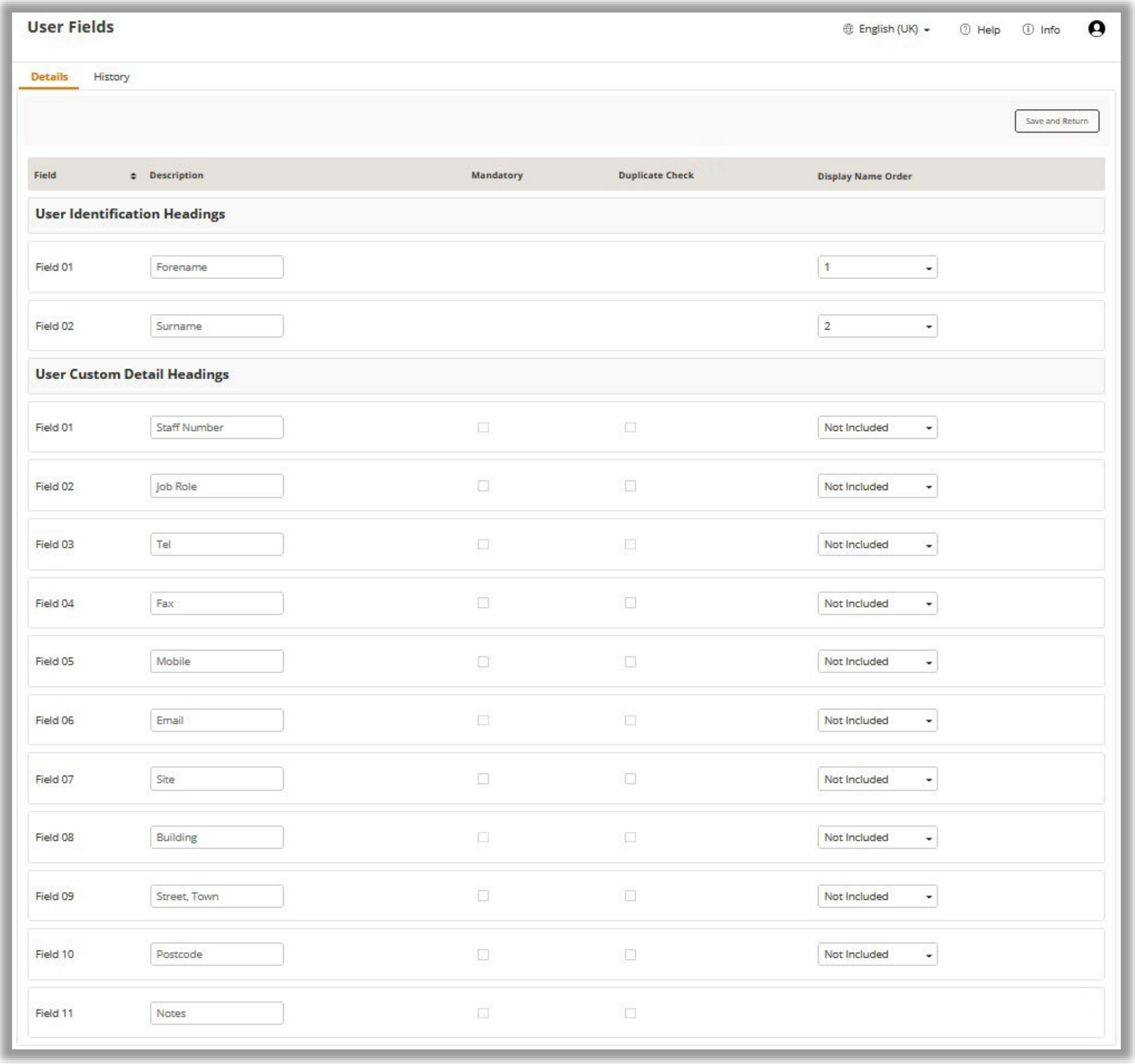
5.3.7 USER FIELDS

User Fields are the title headings of the personal credentials in the User Details page. Instead of the default staff number, position etc. you can customise them to suit your business requirements.

1. To change these, simply click the Software Settings icon from the **Software Settings** sub-menu on the Navigation Menu and select the **User Fields** button.



2. The User Fields page will then be displayed.



User Identification Headings

Here, you can define the two fields that are by default used for the forename and surname. Simply enter the new text into the corresponding text boxes.

- **Display Name Order**

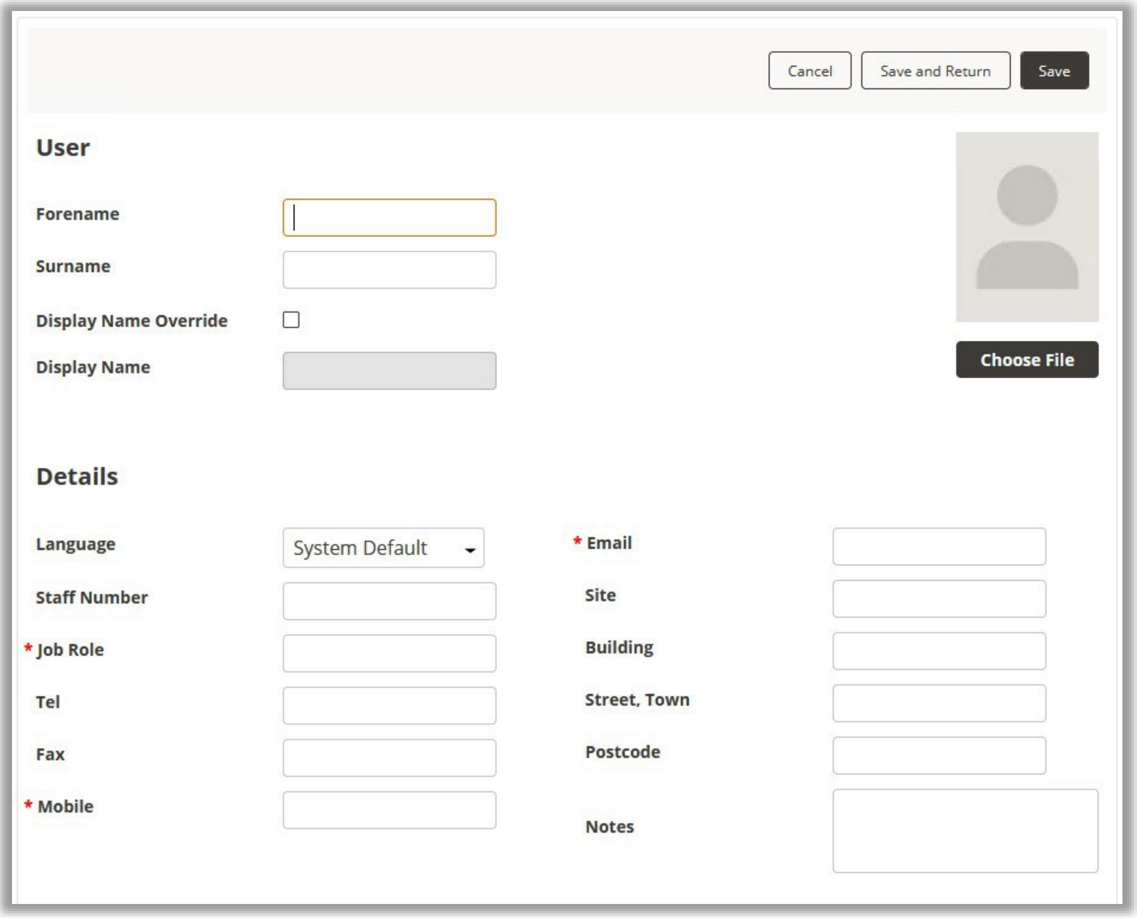
The display name drop-down selection boxes allow you to change which order the fields appear. E.g., if you rearrange forename to 2, surname to 1, and mobile to 3, the Traka Touch will read **Admin Traka 07896852148** instead of the default **Traka Admin**.

User Custom Detail Headings

These are the eleven definable fields that appear on the first tab on the user details. Simply enter the new text into the corresponding text boxes.

- **Mandatory Tick Box**

Checking this box will force the logged in TrakaWEB administrator to populate that particular field when creating a new user. E.g., if the mandatory check boxes were selected for the fields **Job Role**, **Mobile** and **Email**, when the TrakaWEB administrator next creates a new user, they will be forced to enter data into those fields which will be marked by a red asterisk (*) before they are allowed to continue as shown in the example below.



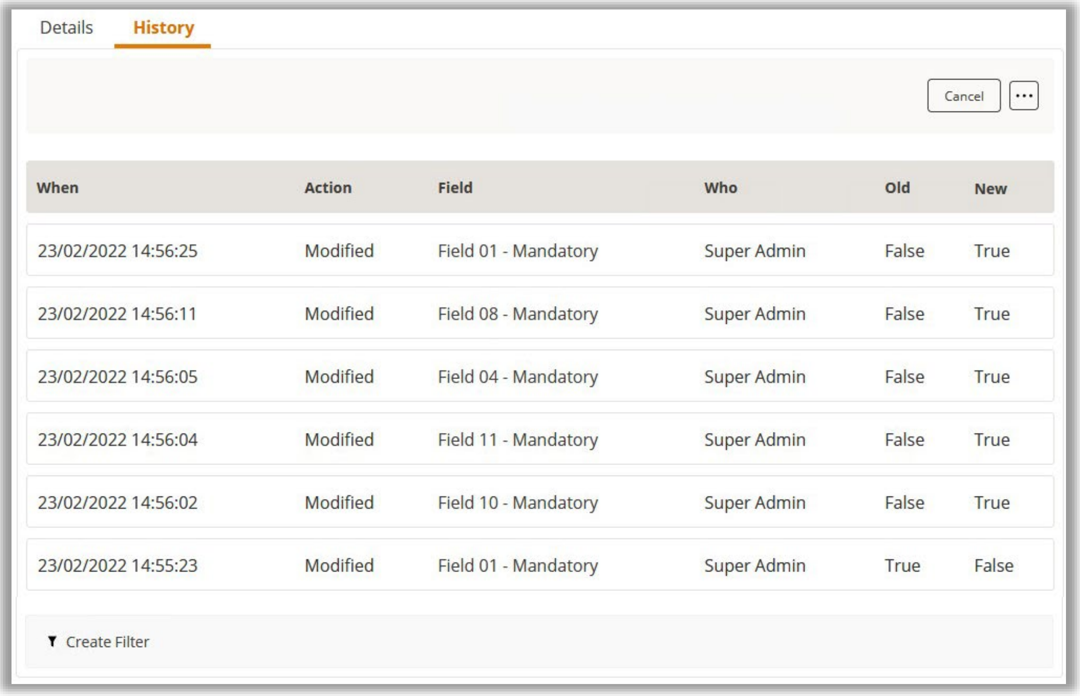
- **Duplicate Check Tick Box**

Checking this box will allow TrakaWEB to search if the identical credentials have been entered against the same field to another user before the details are saved, e.g., if the duplicate check box was ticked for the field 'Mobile' and a TrakaWEB administrator is creating a new user and attempts to enter a mobile number that is already assigned to another user, TrakaWEB will inform you and will not allow you to continue.

3. Once you have selected the required options, click the **Save and Return** button to go back or click the history tab to view past records of changes you have made to each field.

History Tab

This tab keeps a record of all the changes made to each field name and the user who made them. This is useful if you ever want to know what the field titles used to be.



When	Action	Field	Who	Old	New
23/02/2022 14:56:25	Modified	Field 01 - Mandatory	Super Admin	False	True
23/02/2022 14:56:11	Modified	Field 08 - Mandatory	Super Admin	False	True
23/02/2022 14:56:05	Modified	Field 04 - Mandatory	Super Admin	False	True
23/02/2022 14:56:04	Modified	Field 11 - Mandatory	Super Admin	False	True
23/02/2022 14:56:02	Modified	Field 10 - Mandatory	Super Admin	False	True
23/02/2022 14:55:23	Modified	Field 01 - Mandatory	Super Admin	True	False

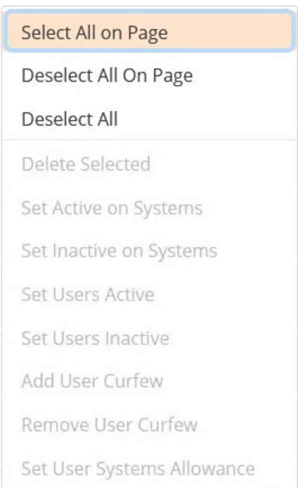
5.3.8 MULTI-SELECT/MULTI-EDIT (MSME)

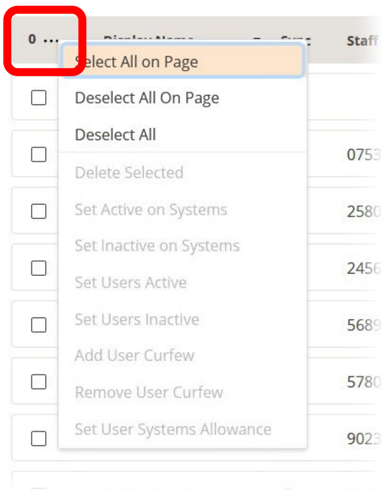
Users

The Multi-Select/Multi-Edit or MSME feature within TrakaWEB can significantly reduce the workload of a user with the Administrator role. It provides the user with the ability to add multiple users to Item Access Groups and Systems. It is also an effective method of making users active or inactive on a system as well as deleting them. This is achieved by using the right mouse button to display a context menu, which will allow the user to choose from a number of options.

The context Menu

The Context Menu is central to the functionality of Multi-Select/Multi-Edit and is available by right clicking the mouse within the grid or left clicking on the Ellipsis option above the check box column. This will display a menu with a series of options. Greyed-out options will only be made available if one or more users have been selected.





Select All on Page

Selecting this option will enable the user to select all the users listed on the current page at once.

Deselect All on Page

This option will enable the user to deselect all the selected users on the current page at once.

Deselect All

If users are selected on one or more pages, this option will enable them all to be deselected.

Delete Selected

This option will enable the user to delete all selected users over multiple pages.

Set Active on Systems

Choosing this option will display a list of available systems. This will allow any selected users to be set as active on one or more systems.

Set Inactive on Systems

This option will enable a user to remove user activity on one or more systems.

Set Users Active

Selecting this option will set any selected users to Active.

Set Users Inactive

Choosing this option will set any selected users to Inactive.

Add User Curfew

Selecting this option will allow an Absolute or Relative curfew to be added to one or more users.

Remove User Curfew

This option will allow an Absolute or Relative curfew to be removed from one or more users.

Set User Systems Allowance

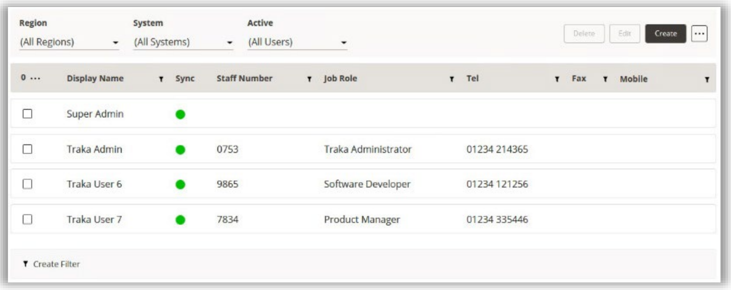
Selecting this option will enable a user to set the System Item Allowance for systems within a selected region for one or more users.

Selecting Users

Users can be selected individually or by using the context menu to select them on a page-by-page basis.

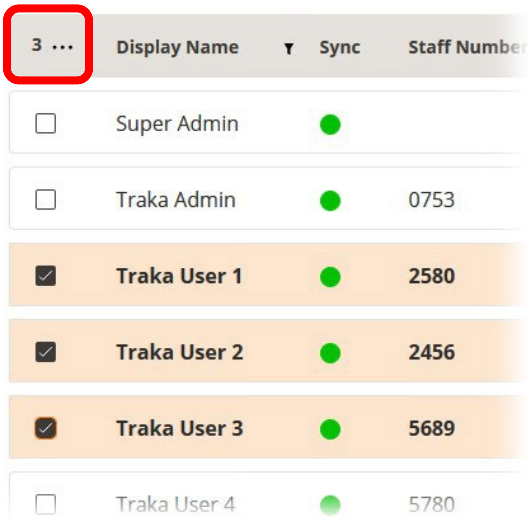
1. From the Navigation Menu, select **Users**.

You will then be taken to the Users page. If you already have users set up in your Traka Touch system, then this list will be populated with all those users along with all the other users in the database. If you have not added any users to your system, you will need to Add Users.

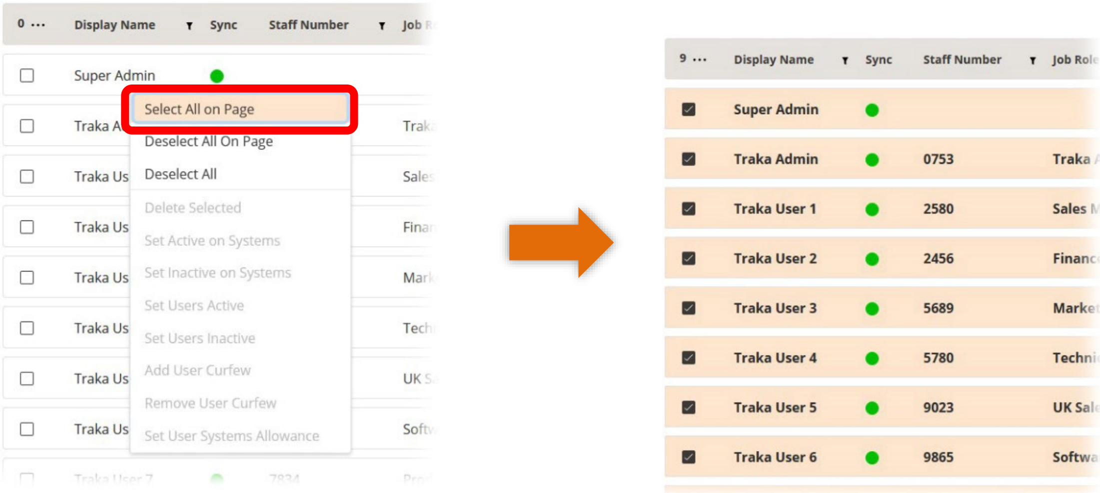


2. To select individual users, click in the check boxes located to the left.

NOTE: Above the column of check boxes, a number will display how many users are currently selected across all pages. This is a useful way of monitoring how many users remain selected, even if there are no users selected on the current page.



3. To select all the users on the current page, right-click and choose the option **Select All on Page.**



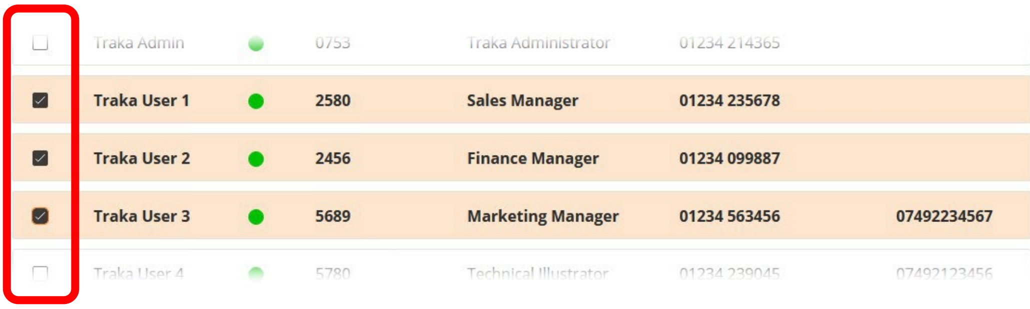
This will select all the check boxes for all users on the current selected page only. You may also choose to Deselect All on Page or, if there are users selected over multiple pages, you can Deselect All.

NOTE: There is no option to select all users at once, as this could potentially lead to a situation where they may be accidentally deleted.

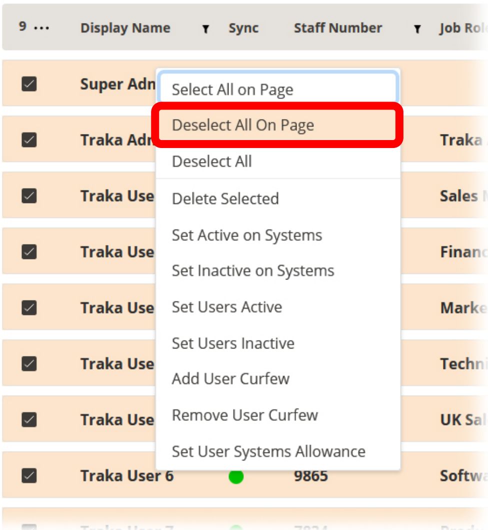
Deselecting Users

Users can be deselected individually, on a page-by-page basis or all at once.

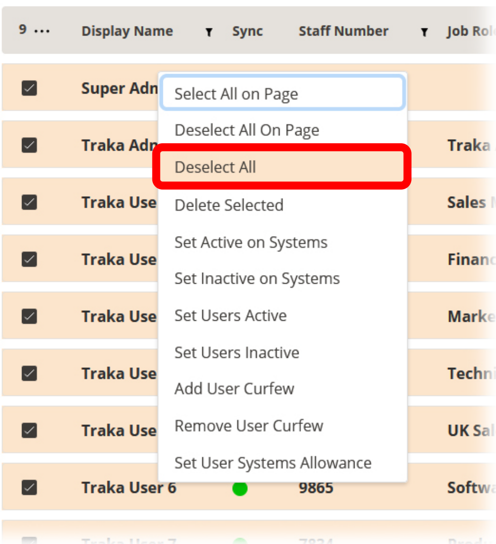
1. To deselect an individual user, click on the corresponding check box located to the left.



2. To deselect all the users on the current page, right click and choose the option **Deselect All on Page.** This will have no effect on selected users on other pages.



3. To deselect all the users across all pages, right-click and choose the option: **Deselect All.**

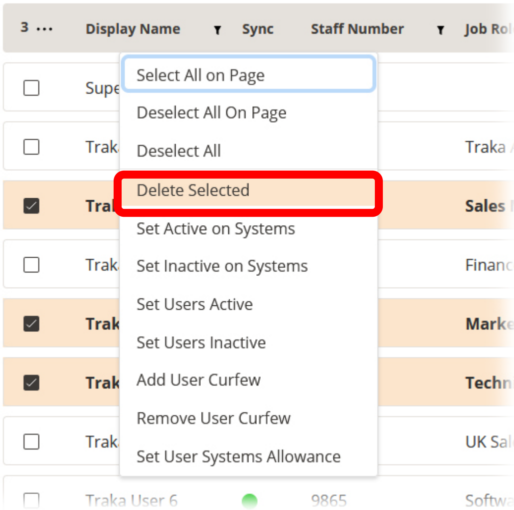


Deleting Users

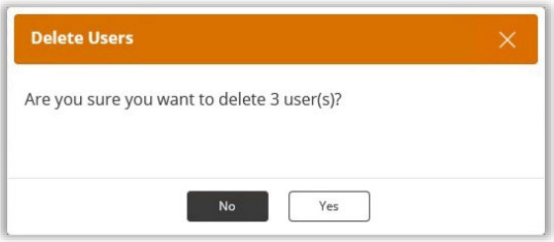
The context menu option for deleting users will only apply when one or more users are selected. This also applies to using the delete button at the top of the page. Once the delete option is selected, a window will appear requesting confirmation.

NOTE: A user will not be able to delete themselves if they are logged into TrakaWEB using their own credentials.

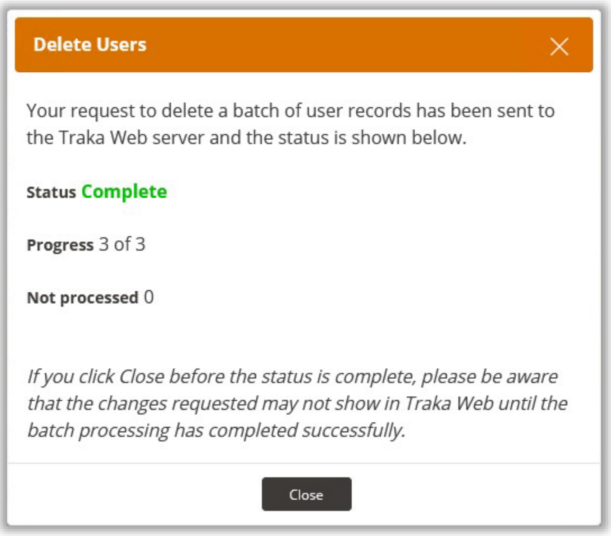
1. To delete the selected users, right click and then choose the option for **Delete Selected.**



A message will appear, requesting conformation that you wish to delete the selected users. Choosing **No** will close the window and return to the Users page. Select **Yes** to start the process.



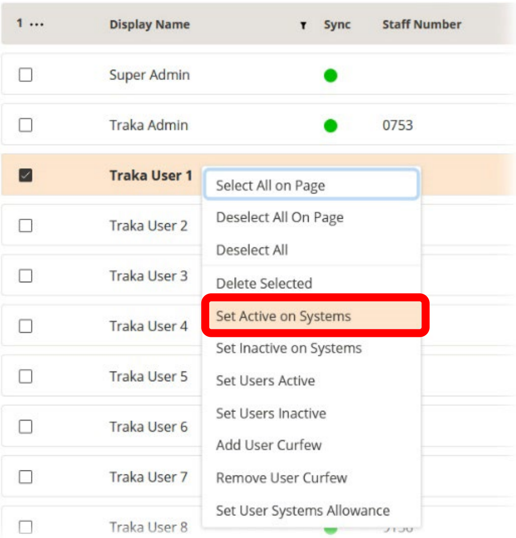
A window will appear displaying the progress and status. Once completed, click on the **Close** button. If the process was successful, the selected users will be removed.



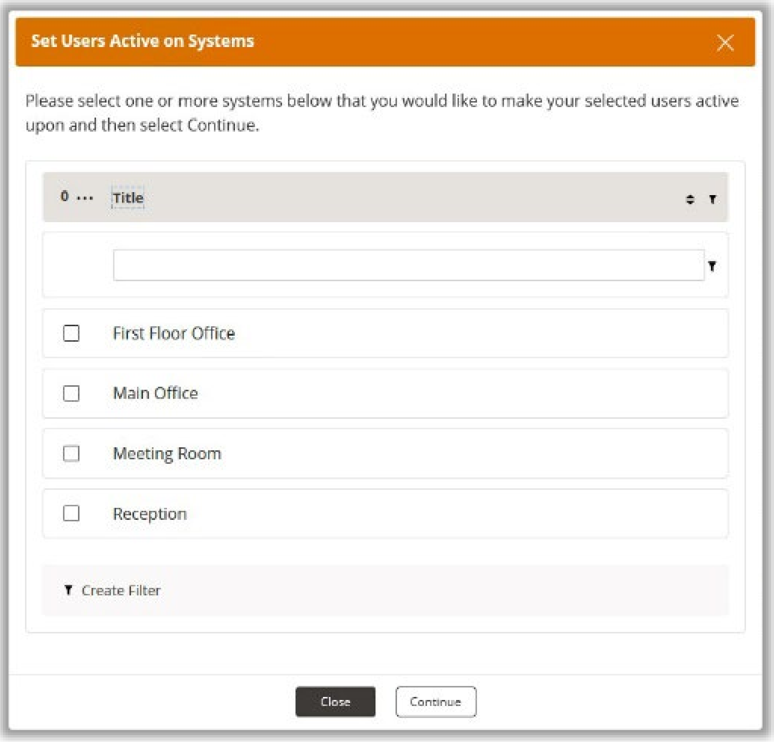
Set Active on Systems

Using the context menu to set a user active on a system is a more efficient method than navigating to the System Access tab.

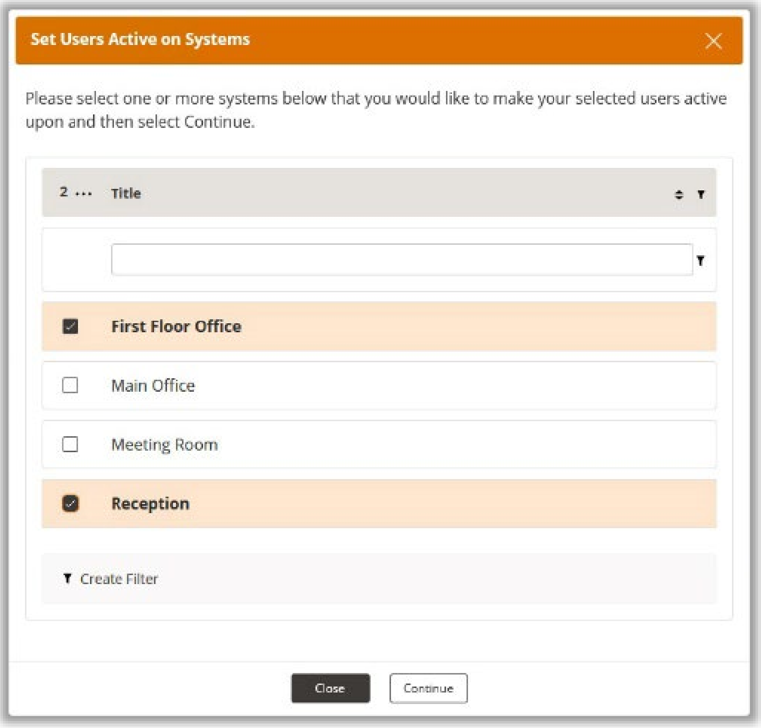
1. Select the user that you wish to set as active on a system by right clicking and choosing the **Set Active on Systems** option.



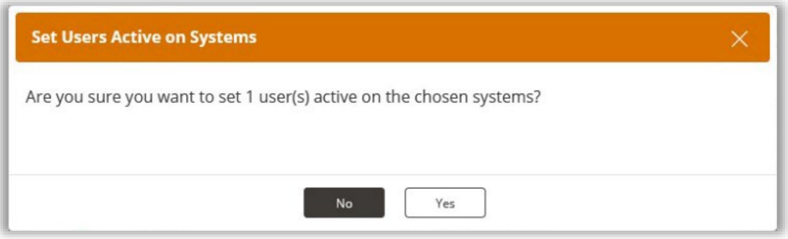
A new window will appear displaying a list of all the available systems.



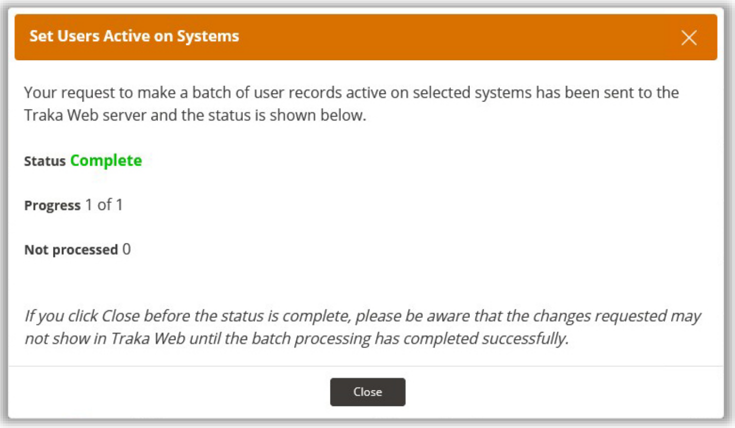
2. Select the systems that you wish to allocate to the user and then click on **Continue.**



A message will appear asking for confirmation that you wish to set the user or users active on the selected systems. Selecting **No** will close the message and return to the Users page. Select **Yes** to start the process.



A window will appear displaying the progress and status. Once completed, click on the **Close** button. If the process was successful, the selected users will be set as active on the assigned systems.



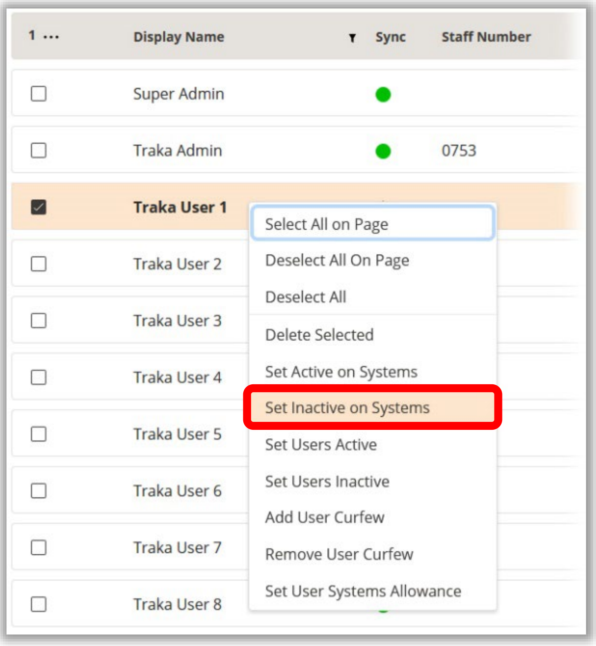
NOTE: Clicking on Close before the status is complete will not cancel the operation. The batch process will continue to run, and any changes will not be displayed until the process has completed.

The user will now be set as active on the selected systems.

Set Inactive on Systems

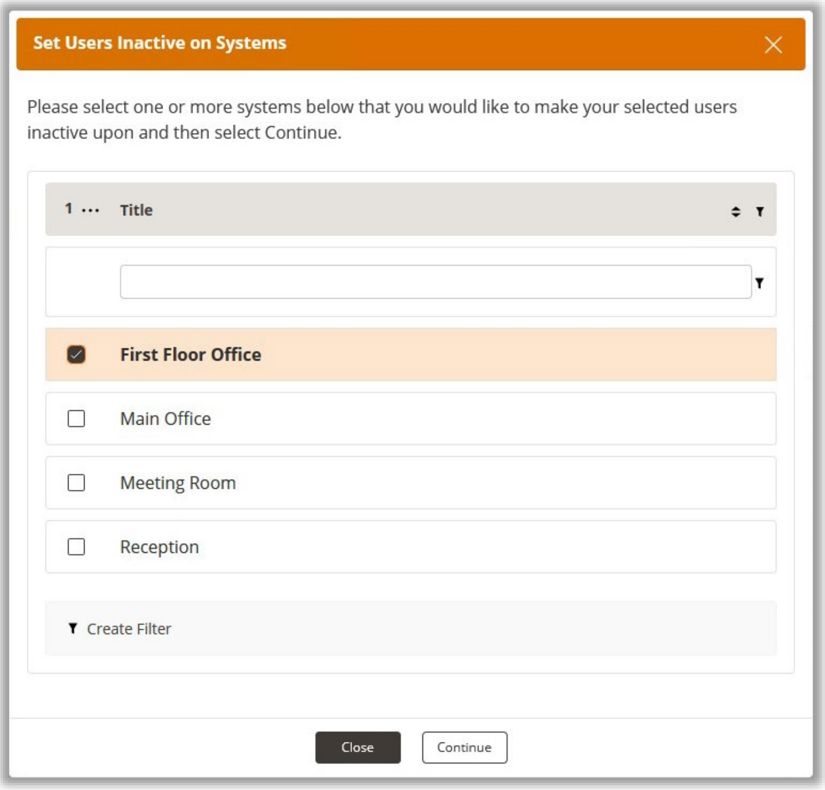
Setting users as inactive on a system will remove their ability to use whichever system or systems are selected from the list of those available.

1. Select the users that you wish to set as inactive on systems. Right click and choose **Set Inactive on Systems** from the context menu.

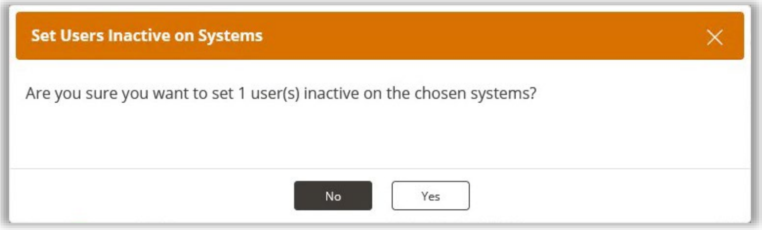


A window will now appear displaying all the available systems.

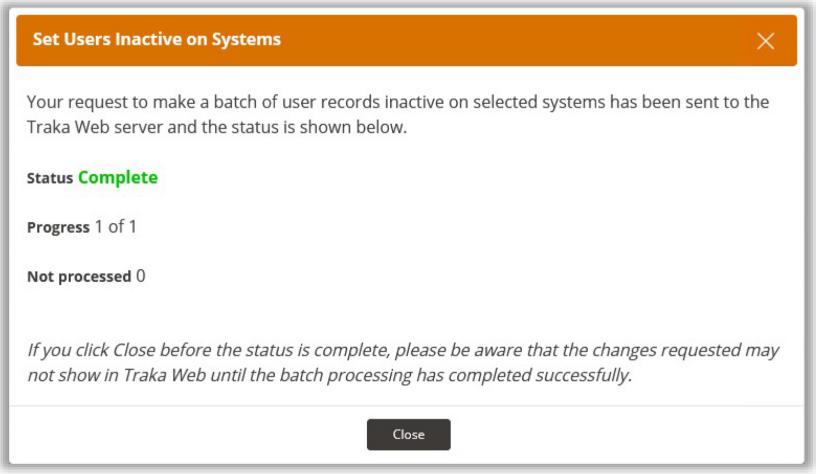
2. Select which systems you wish to set as inactive to the users and then click on **Continue**.



A message will be displayed requesting confirmation that you wish to set the selected users inactive on the chosen systems. Selecting **No** will close the message, and you will return to the Users page. Select **Yes** to start the process.



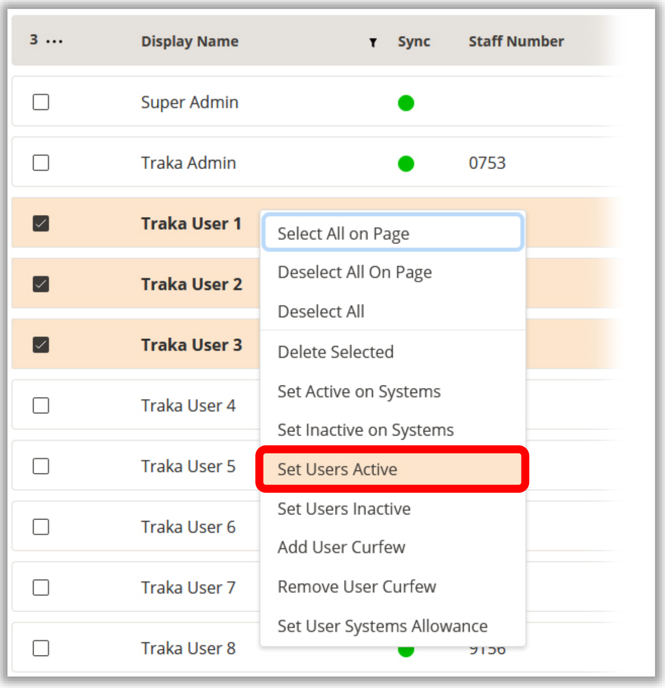
A window will appear, displaying the status of the process. Once completed, click on **Close.** If successful, the selected users will then be set as inactive on the selected systems.



Set Users Active

Using the context menu through the MSME feature can set a user as Active without having to navigate to the System Access tab.

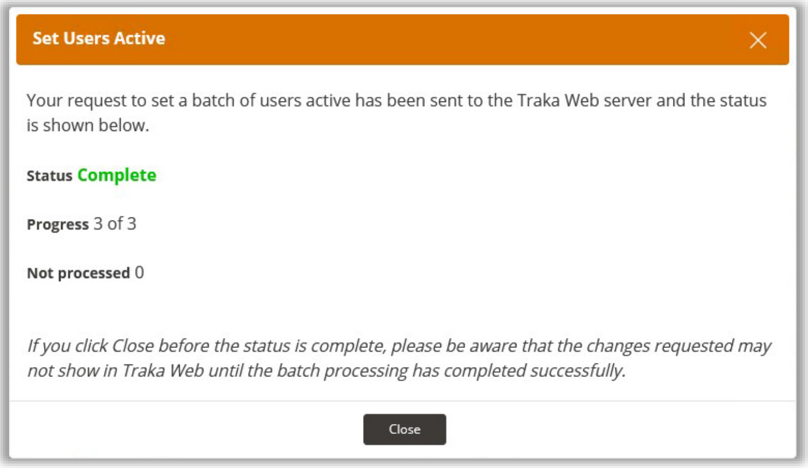
1. Select the users you wish to set as active and then right click and choose **Set Users Active** from the context menu.



A message will be displayed requesting confirmation that you wish to set the selected users as active. Selecting **No** will close the message, and you will return to the Users page.

2. Select **Yes** to begin the process.

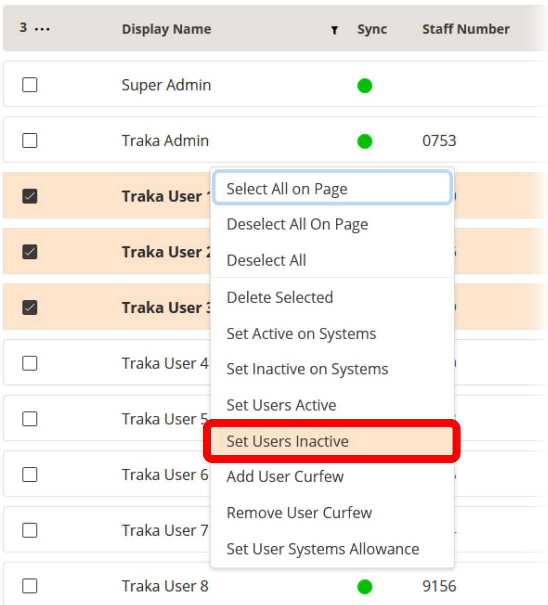
A window will appear, displaying the status of the process. Once completed, click on **Close.** If the process was successful, the selected users will then be set as active.



Set Users Inactive

Similar to **Setting Users as Active**, using the context menu through the MSME feature can set a user as Inactive without having to navigate to the System Access tab.

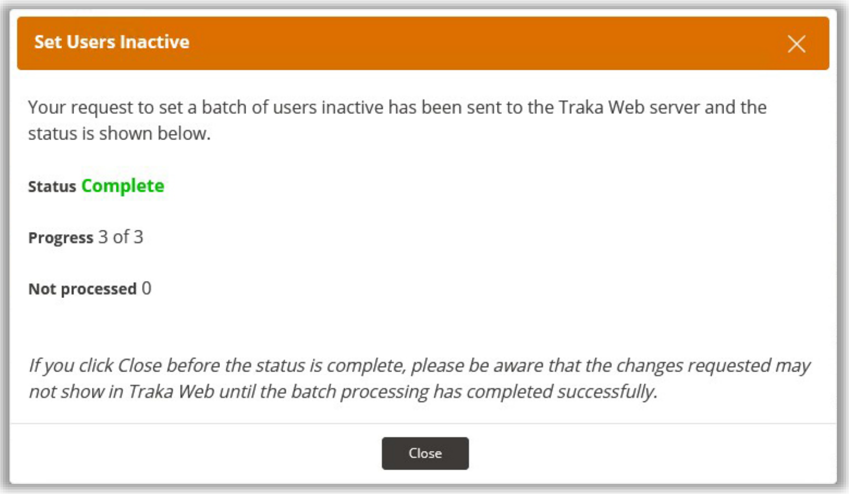
1. Select the users that you wish to set as Inactive and then right click and choose **Set Users Inactive**.



A message will be displayed requesting confirmation that you wish to set the selected users as inactive. Selecting **No** will close the message, and you will return to the Users page.

2. Select **Yes** to begin the process.

A window will appear displaying the status of the process. Once completed, click on **Close.** If successful, the selected users will then be set as inactive.



Add User Curfew

To read more on how to add User Curfew with help of the Multi-Select/Multi-Edit functionality, please refer to the User Curfews section in this document.

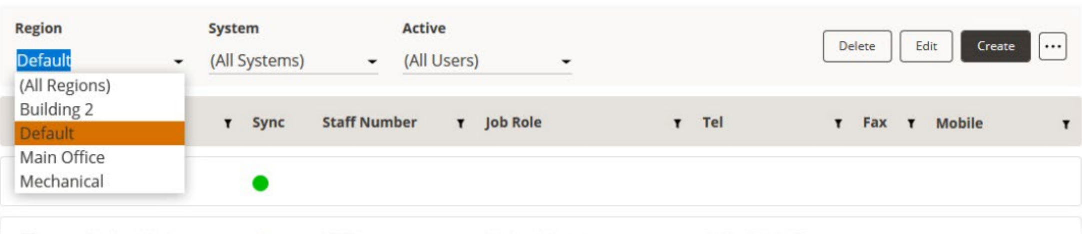
Remove User Curfew

To read more on how to remove User Curfew with help of the Multi-Select/Multi-Edit functionality, please refer to the User Curfews section in this document.

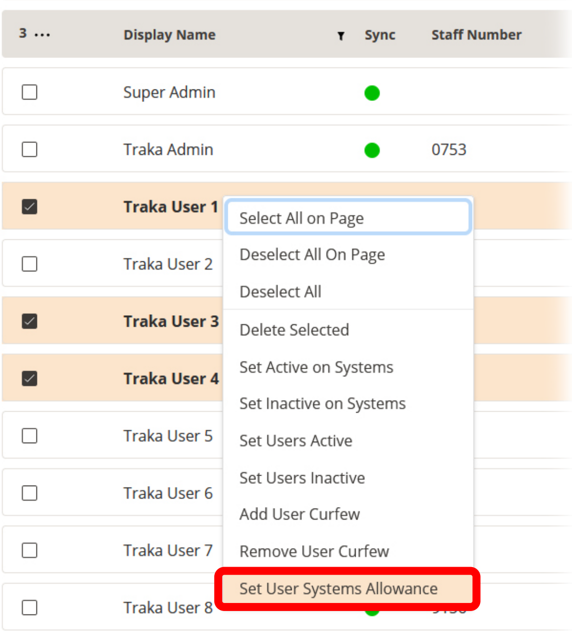
Set User Systems Allowance

The **Set User Systems Allowance** option will enable a user to set the System Item Allowance on systems within a selected region for one or more users.

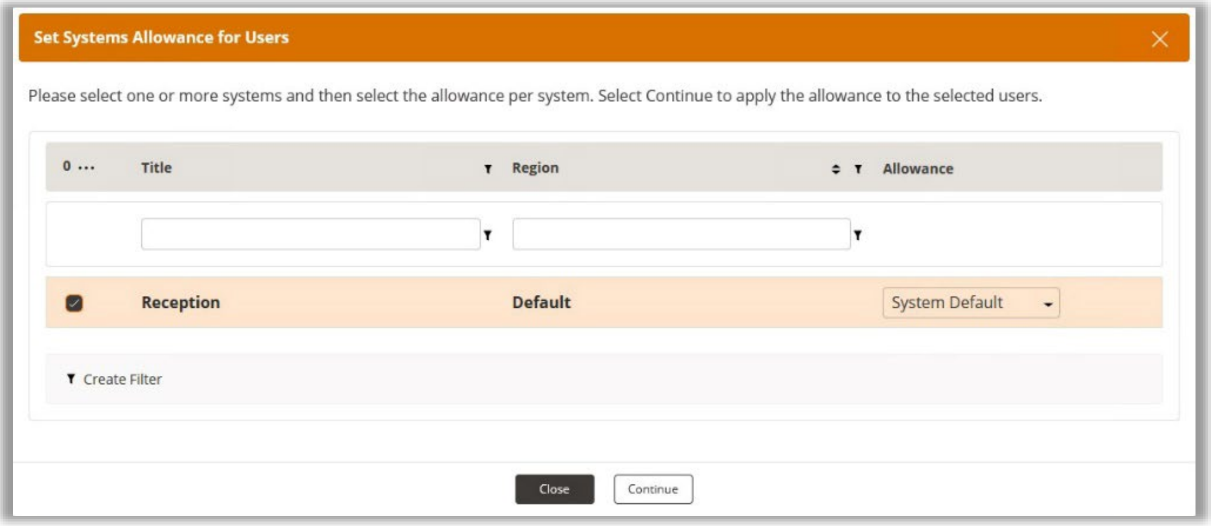
1. From the Users page, select the region that you wish to select the systems for allocating the User Systems Allowance.



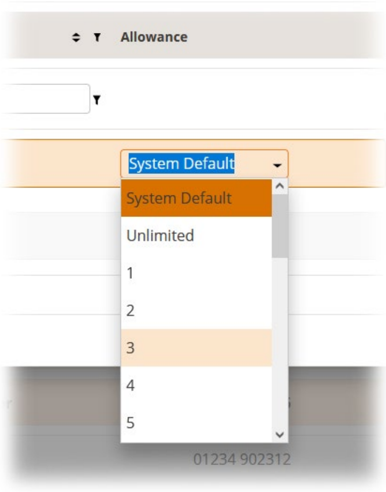
2. Select the user or users that you wish to set the User Systems Allowance then right click and choose **Set User System Allowance** from the context menu.



3. At the next screen, select the system or systems for the selected region by clicking in the checkbox to the left.



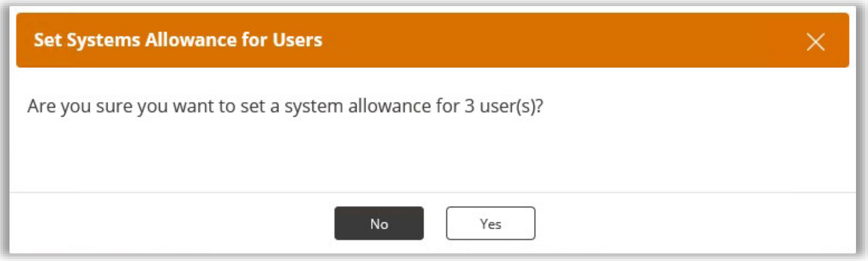
4. Over to the right of the screen, select the drop-down menu in the Allowance column and select the Item Allowance for the selected users.



5. Now Select the **Continue** button.

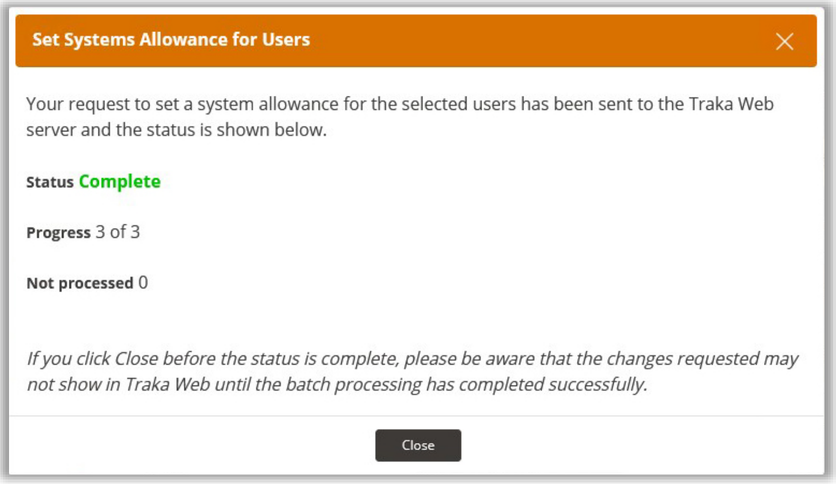
A window will now appear requesting confirmation to Set Systems Allowance for Users.

6. Select **Yes** to continue.



A window will now appear showing the progress and status of the process.

7. Once completed, click on the **close** button.

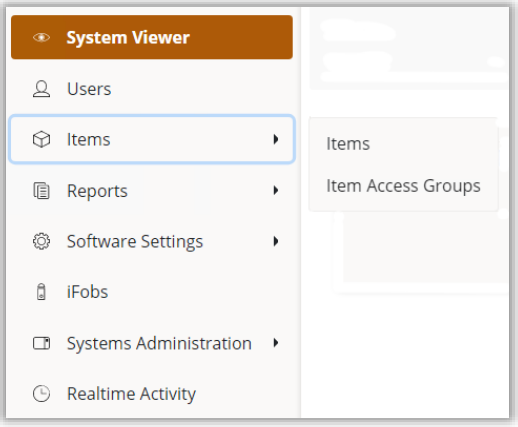


NOTE: When the Item Allowance limit has been reached for a non-Anonymous user, a TrakaWEB Admin user may remotely release more items to the user from that same system effectively overriding their Item Allowance. This is achieved via the I Know What I Want screen when the user has been remotely logged in.

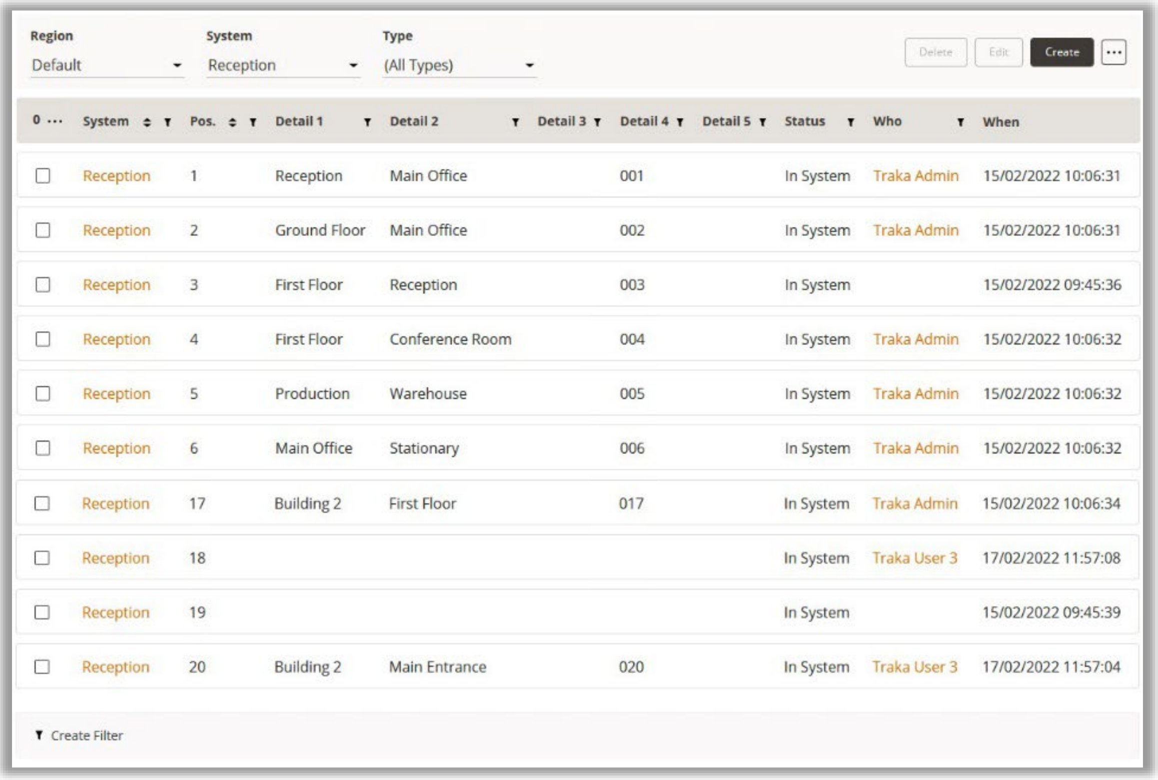
5.4 ITEMS

5.4.1 ITEM LIST

From the [Navigation Menu,](#) click the Items tab. A sub-menu will appear with the option to choose from either **Item Access Groups** or **Items.**



1. Select **Items**, you will then be taken to the Items list. All the items in your Traka Touch system will automatically synchronise when you log into TrakaWEB (providing you enabled communications from your Traka Touch system).



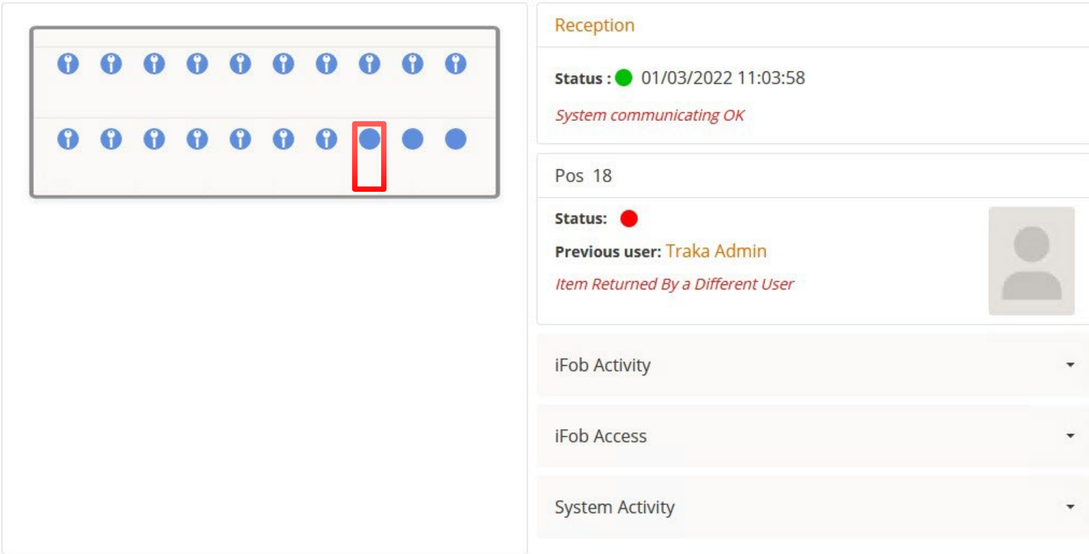
0 ...	System	Pos.	Detail 1	Detail 2	Detail 3	Detail 4	Detail 5	Status	Who	When
☐	Reception	1	Reception	Main Office		001		In System	Traka Admin	15/02/2022 10:06:31
☐	Reception	2	Ground Floor	Main Office		002		In System	Traka Admin	15/02/2022 10:06:31
☐	Reception	3	First Floor	Reception		003		In System		15/02/2022 09:45:36
☐	Reception	4	First Floor	Conference Room		004		In System	Traka Admin	15/02/2022 10:06:32
☐	Reception	5	Production	Warehouse		005		In System	Traka Admin	15/02/2022 10:06:32
☐	Reception	6	Main Office	Stationary		006		In System	Traka Admin	15/02/2022 10:06:32
☐	Reception	17	Building 2	First Floor		017		In System	Traka Admin	15/02/2022 10:06:34
☐	Reception	18						In System	Traka User 3	17/02/2022 11:57:08
☐	Reception	19						In System		15/02/2022 09:45:39
☐	Reception	20	Building 2	Main Entrance		020		In System	Traka User 3	17/02/2022 11:57:04

The list shows all the items that are currently in your Traka Touch system, their current status & various definable detail columns. The list that is displayed will depend on the Region, System & Item Type filters that are currently selected on the [Toolbar](#). To view only items that are from a specific region/system or are of a specific type, you must select the appropriate filter.

5.4.2 ADDING A NEW ITEM

Adding a new item to the system can be achieved in two ways. You can either:

1. From the System Viewer, select the position for the new Item.

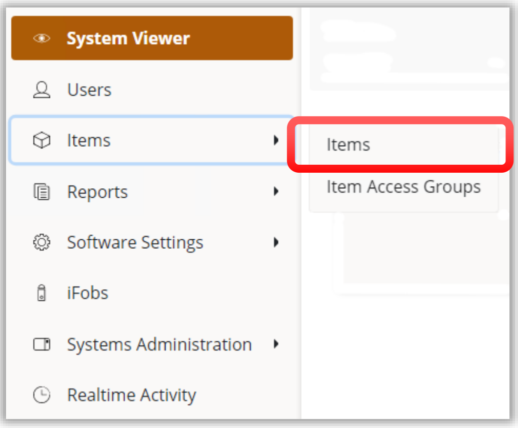


2. From the Ribbon toolbar, select the Edit Items button.

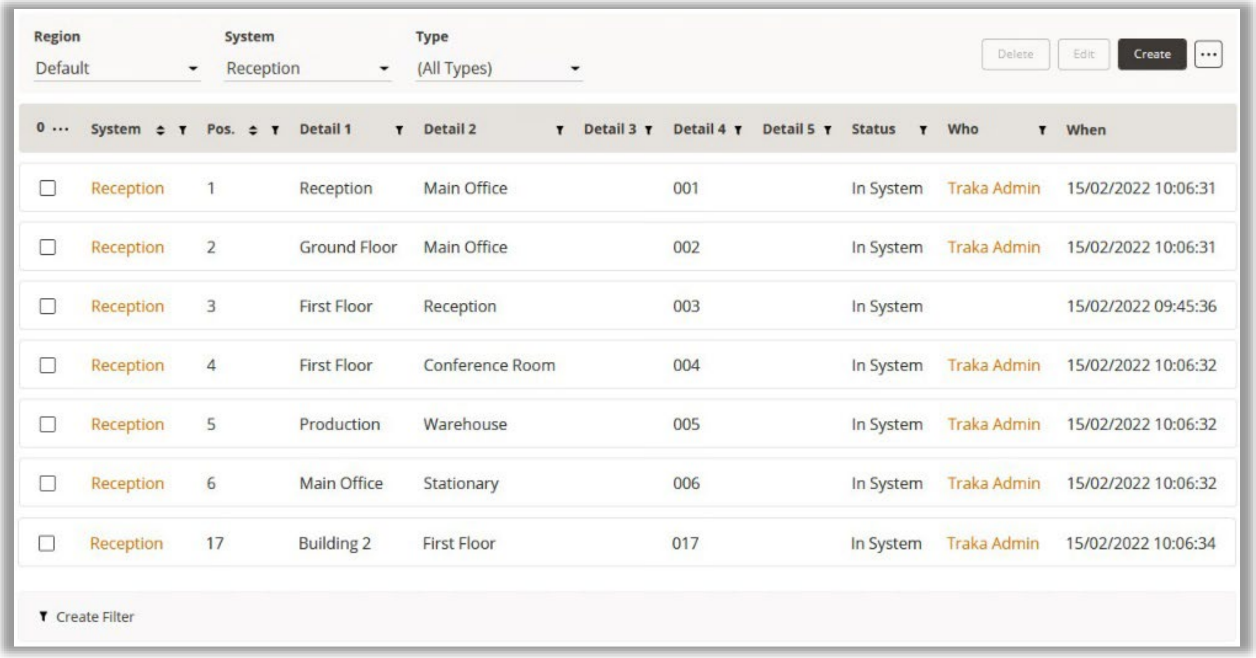
You will then be taken to the **New Item** page.

Or:

3. From the Navigation Menu, select **Items** from the Items sub-menu.



You will now be taken to the Items page, showing a list of all the items currently in the system.



4. From the Toolbar, click on the Create button.

You will now be taken to the **New Item** page.

At the **New Item** page, you can enter specific details for the Item in the Details section.

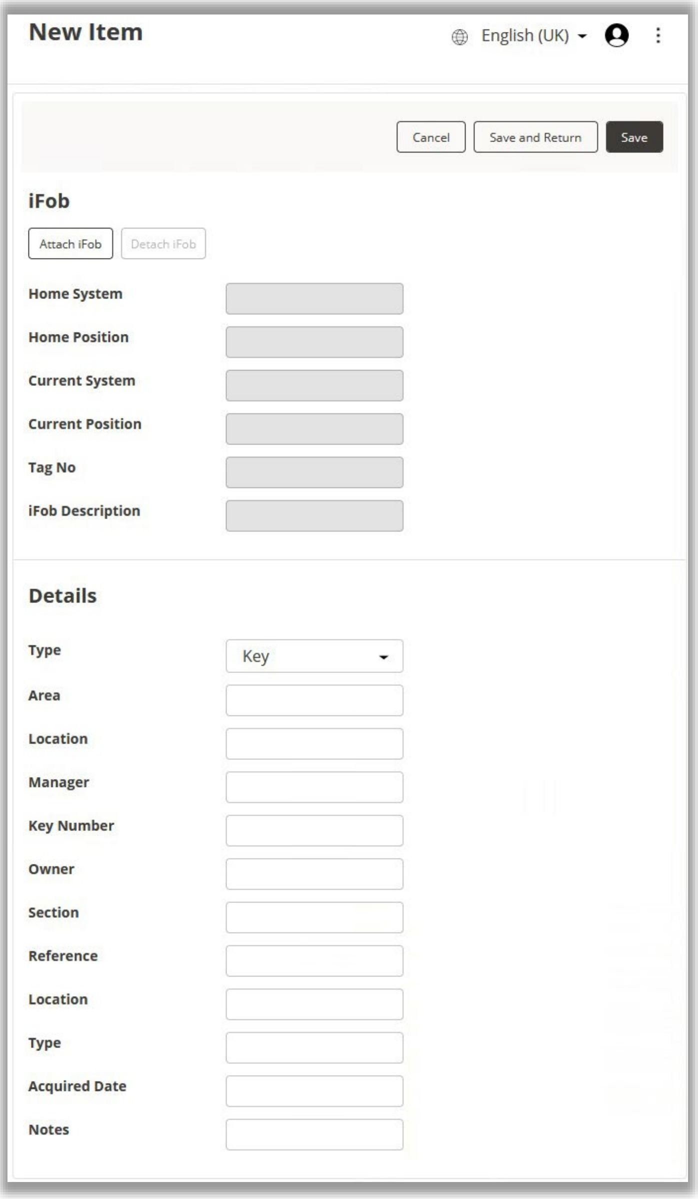
Details

Type

Here you can assign the Item Type e.g., a locker key, car key, door key etc.

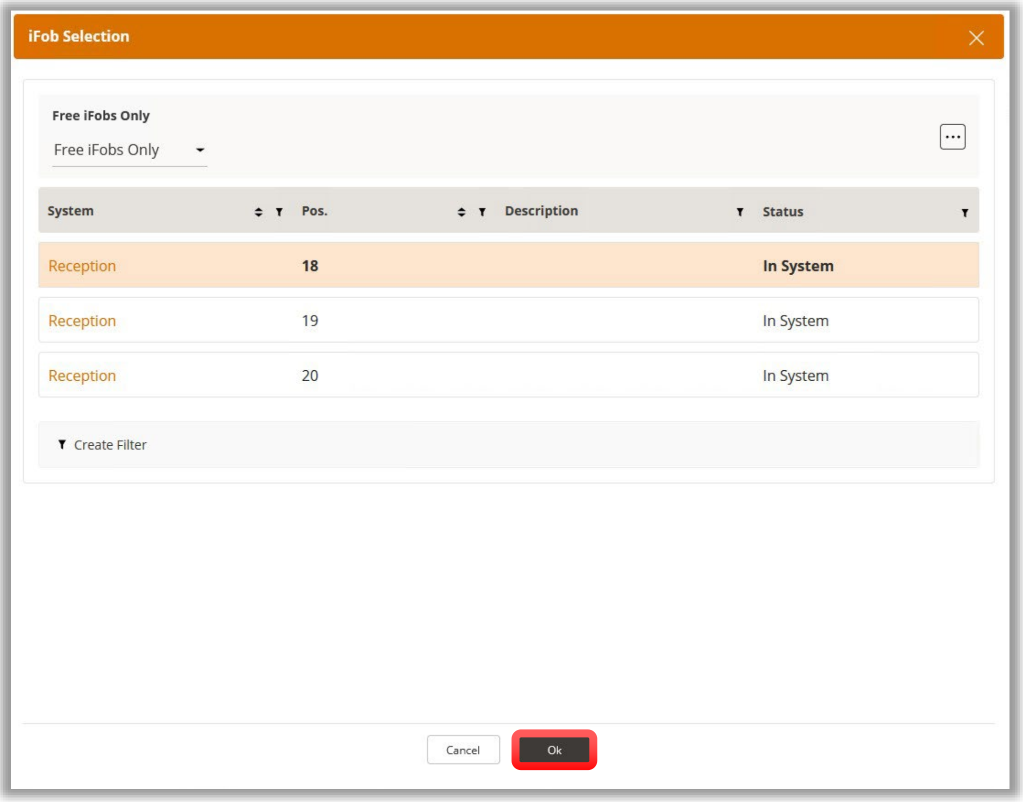
Details Fields

The detail fields that follow will change depending on the selected item type. Please refer to Adding New Item Types or Editing an Item Type for further details. Alternatively, you can edit the selected item type by selecting the 'Edit item' button on the Toolbar.



Selecting the **Attach iFob** button from the Details page will direct you to the iFob Selection window. Here, you will see a list of available positions that remain available in the system.

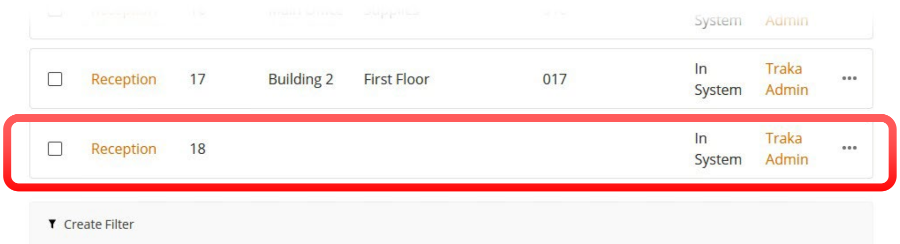
5. Select an available position and then click on **OK.**



You will now be directed back to the Details page.

NOTE: With an item selected, you may also use the 'Detach iFob' button to remove an item from the selected position.

Once completed, click on **Save and Return** from the Toolbar. This will take you to the Items list page, showing the newly added Item in the existing list.

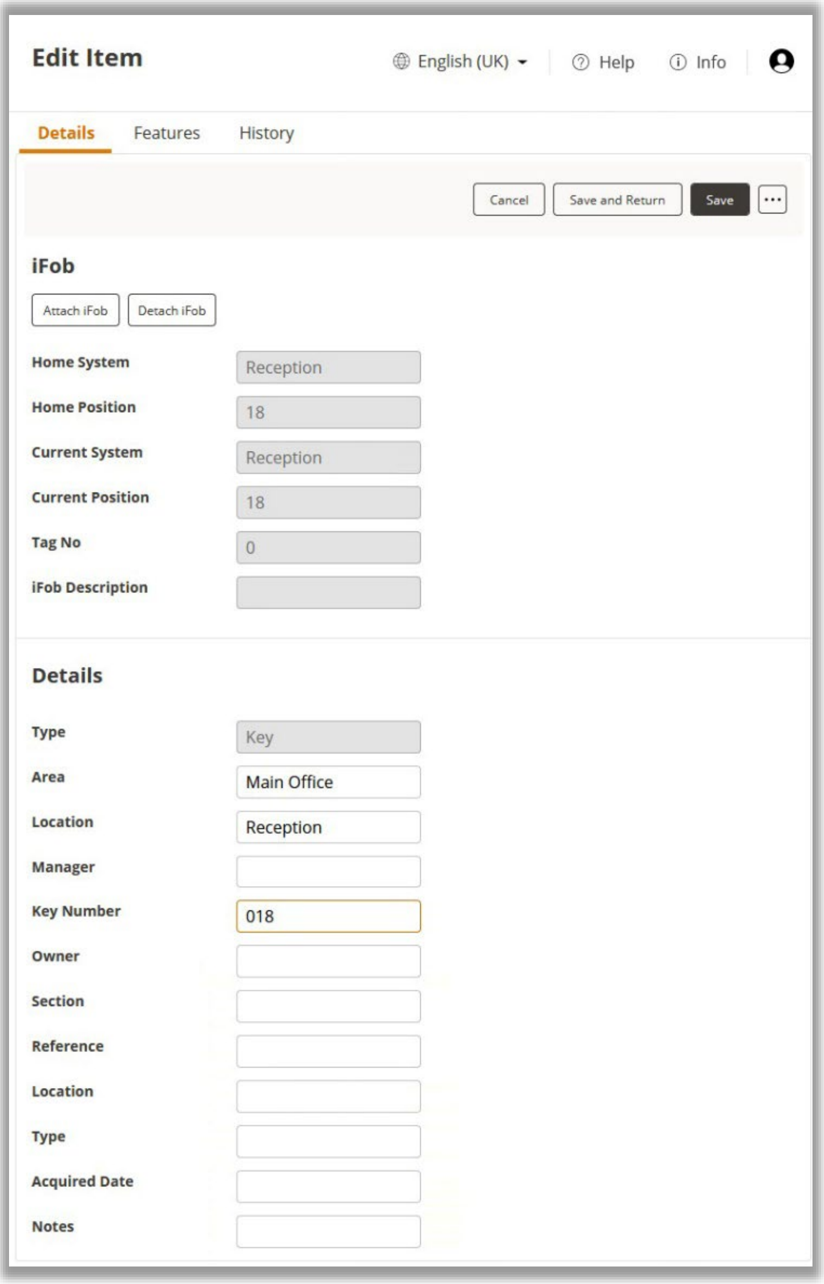


The process can be repeated to add more new items.

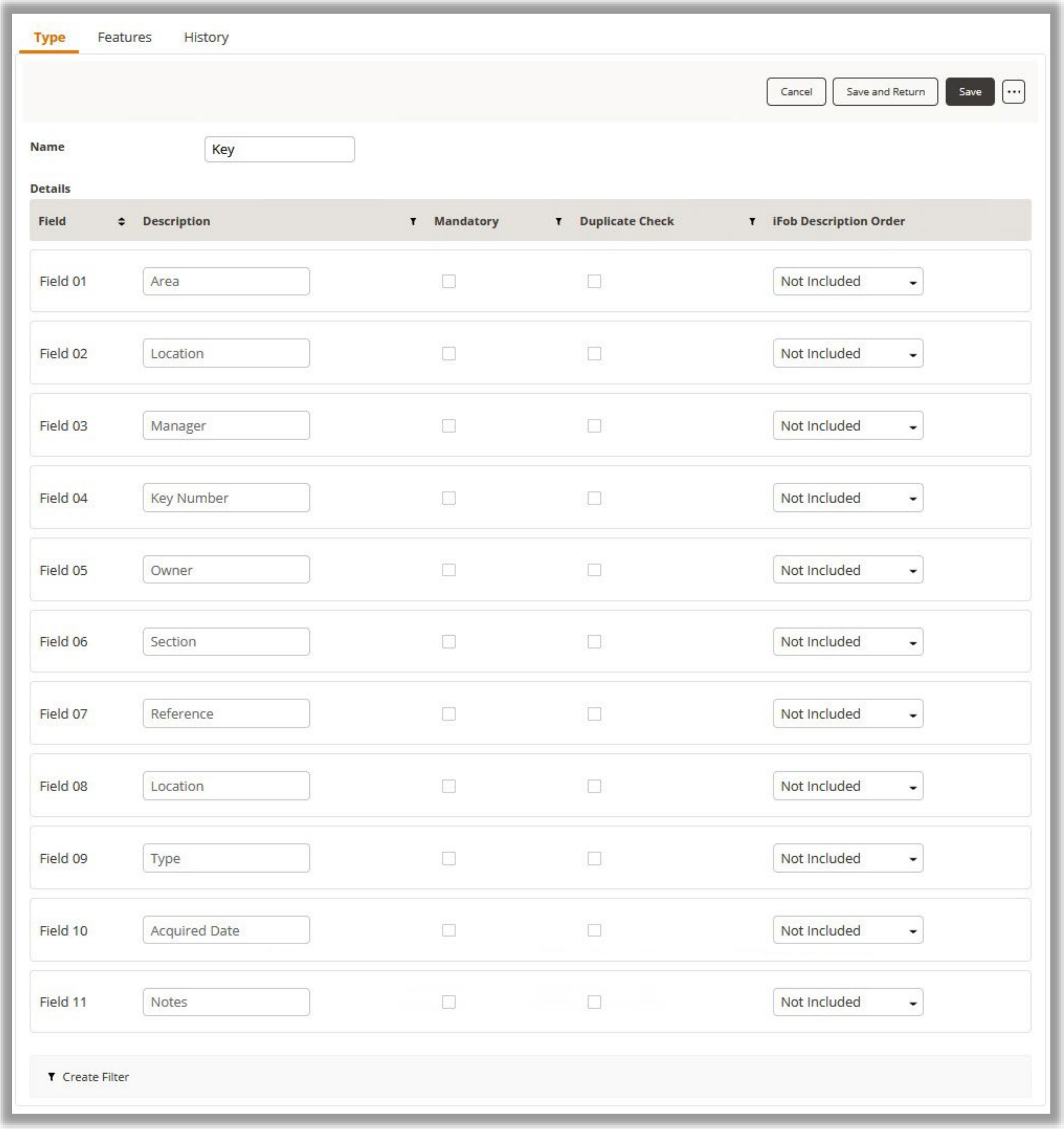
5.4.3 EDITING AN ITEM

1. From the system viewer, highlight an iFob or locker compartment with an item defined and then select the **Edit Items** button from the Toolbar. Alternatively, using the Navigation Menu, click the **Item** option from the sub-menu. From the item list, highlight the desired item and click the Edit button from the Toolbar.

2. If you clicked **Edit Item** from the system viewer page, you will be presented with the Details tab on the New Item details page. You will be able to see the details currently defined for that position. From here, you can edit the system details in the Details section as shown below.



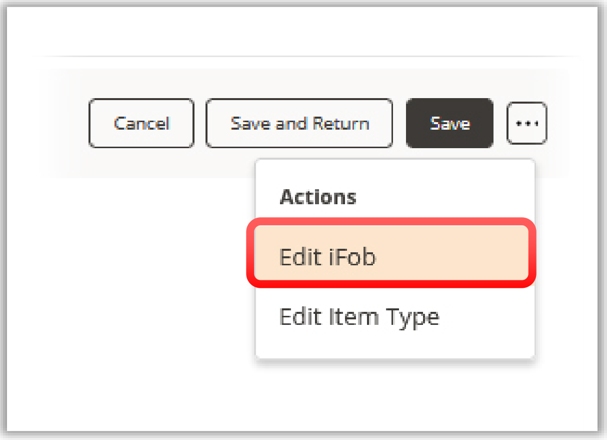
Clicking **Edit Item Type** from the  Ellipsis menu on the Toolbar will take you to the Edit Item Type detail page where you can redefine all the item's details and descriptions.



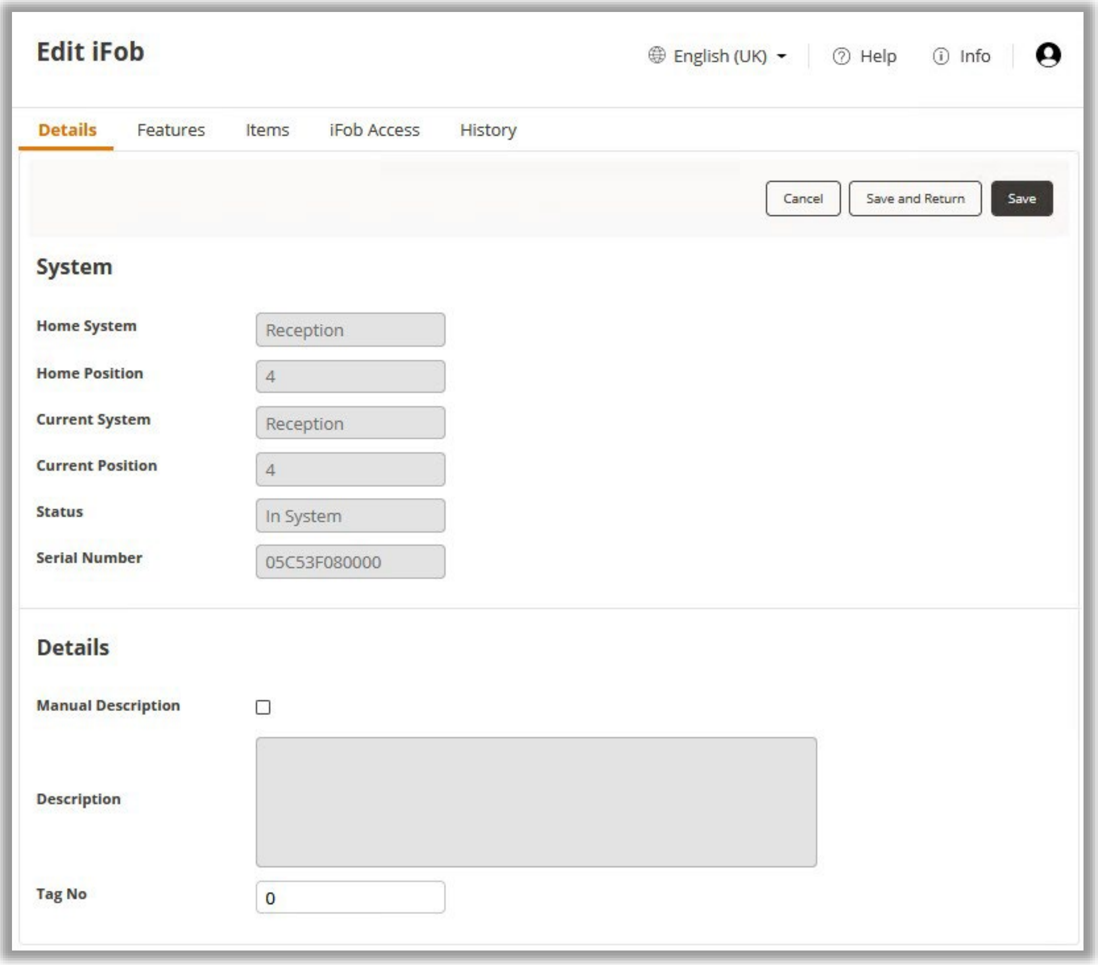
3. If you navigated directly to the Item Page, then you will currently be looking at the Item list. This list will have every item defined for any position in the database. Highlight the item you wish to edit and click the **Edit Item** button. You will then be directed back to the Edit Item page.

As well as being able to Edit Item Type, at the New Item page, you can also select **Edit iFob**.

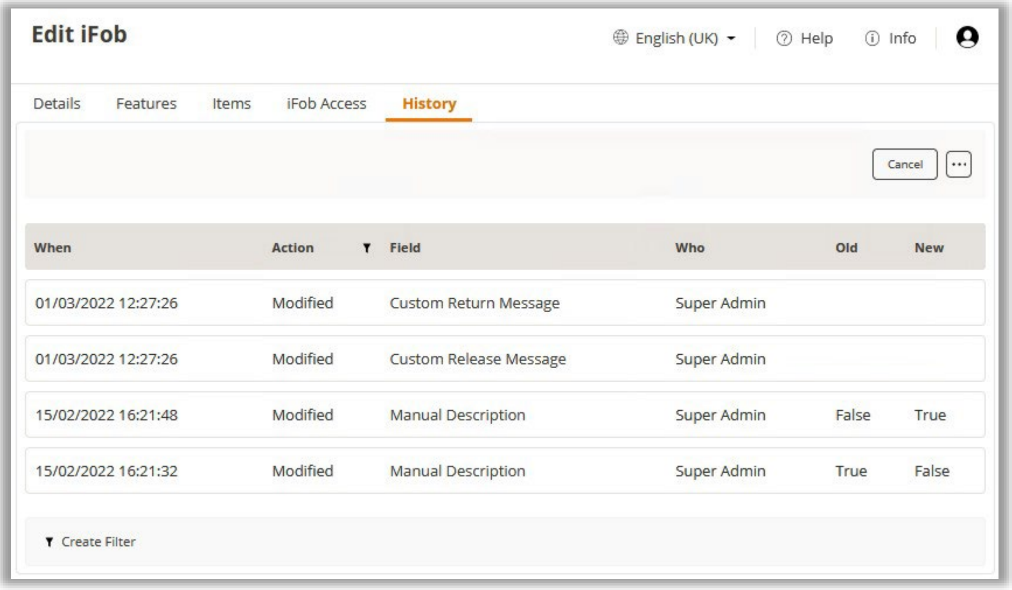
4. From the Edit Item page, select **Edit iFob** from the Ellipsis menu on the Toolbar.



This page enables you to edit the details of an iFob. It also contains the Items tab, which again will allow you to add or edit items. This page also contains the Features tab, iFob Access, and History tab.

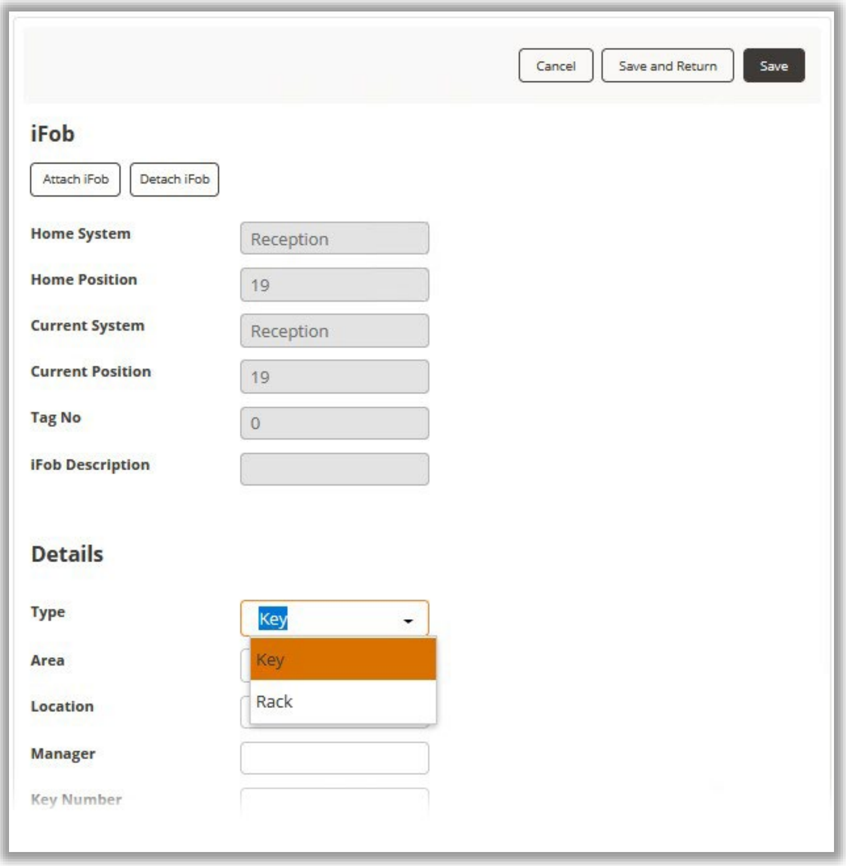


The history tab keeps a record of all the changes made to the data in each field and who made the changes. This is useful if you ever want to know what the field details used to be.



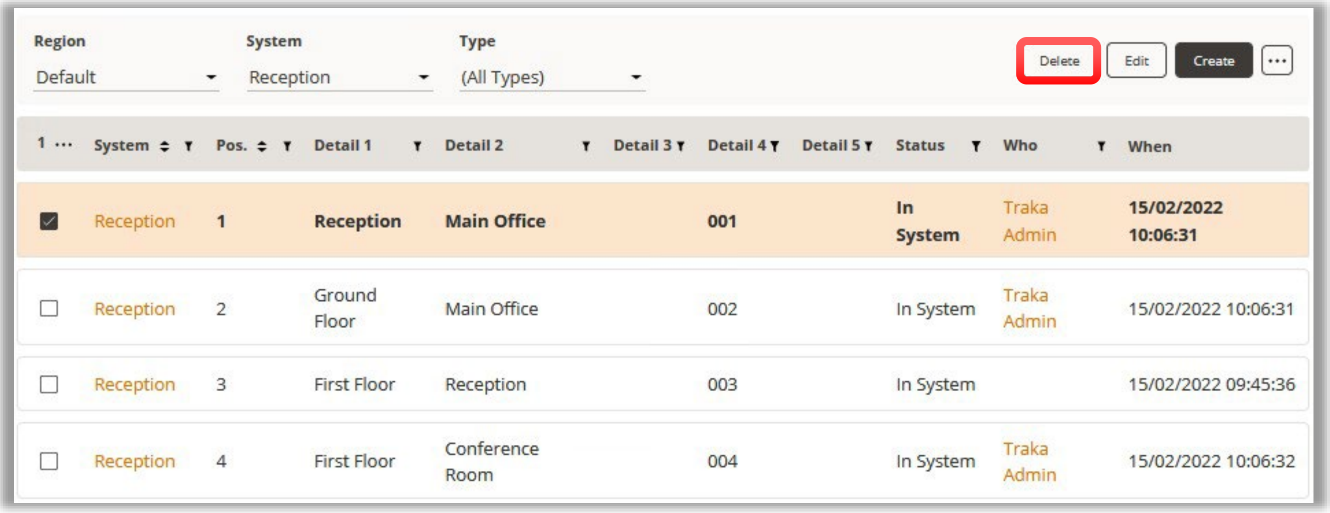
5. When you have completed editing the item, click the Save button or click **Save and Return** to be taken back to the Item List.

If an iFob does not have an item assigned to it and you click **Edit Items**, you will be taken to the 'New Item' page. Here, you can assign a new Item Type, such as a key, to an iFob.

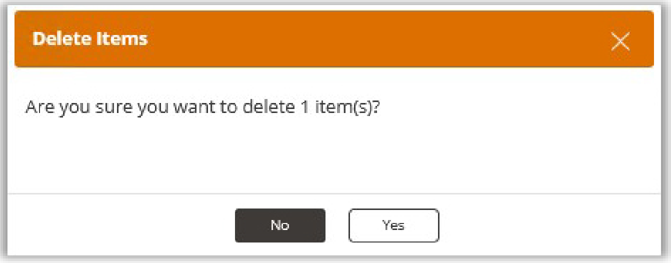


5.4.4 DELETING AN ITEM

1. From the Item List, select the desired item and click the **Delete** button.

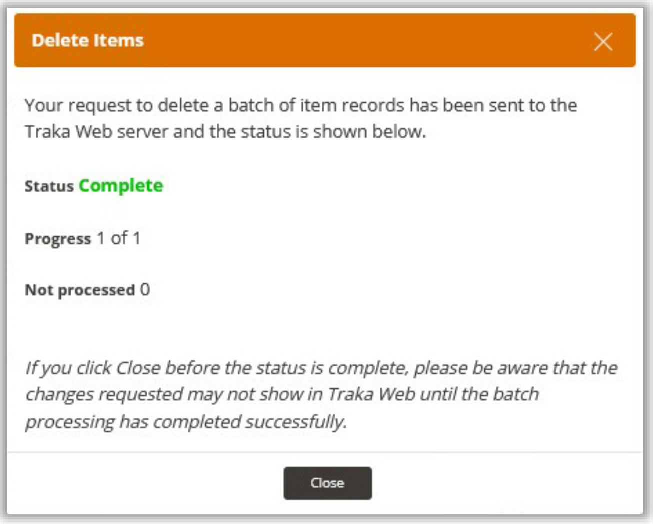


2. A window will appear asking for confirmation to delete the item.



3. Click **Yes** to confirm.

A new window will appear confirming the status of the process. Once you click on the **Close** button, the item will no longer appear in the list.



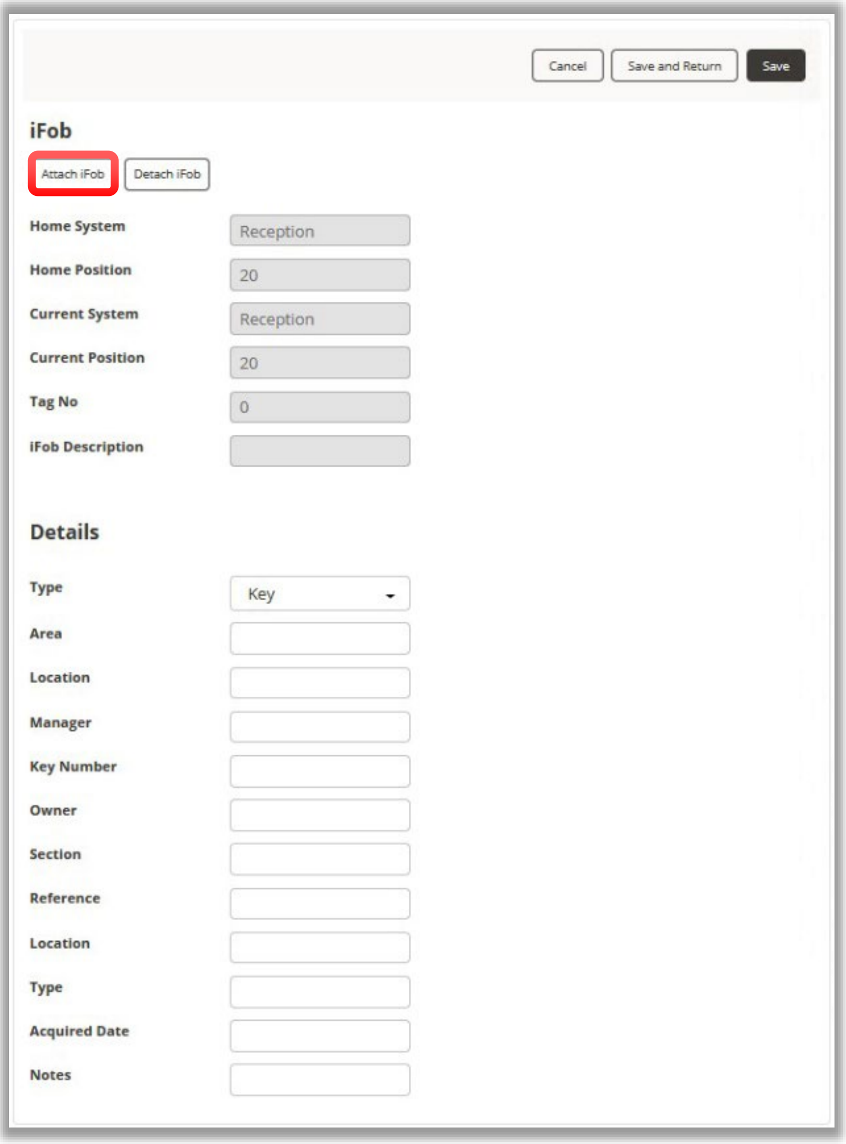
5.4.5 ADDING AN ITEM TO AN IFOB

NOTE: If your system is an RFID Locker System, it will not contain iFobs. However, this section will still be relevant and the term 'iFob' will be referring to the 'RFID Tag' in a Locker System.

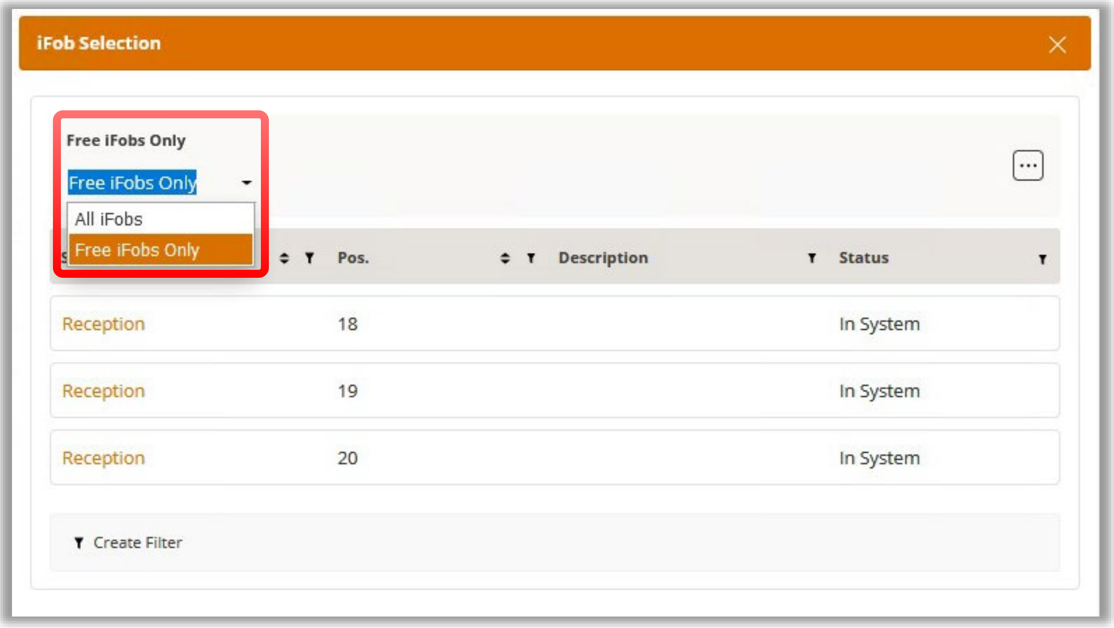
TrakaWEB by default has an item type already created named 'Key'. This item type can be used at any time. TrakaWEB also allows you to create your own item types and assign them to iFobs on the system viewer. Therefore, you could create an item type called Car Keys and then create twenty car keys that you can then assign to the iFobs.

Note: The number of items allowed per iFob is controlled by the TrakaWEB Admin setting 'iFob Maximum Items'. Additionally, all items assigned to a single iFob must be of the same ITEM TYPE. The maximum by default is 25 items per iFob.

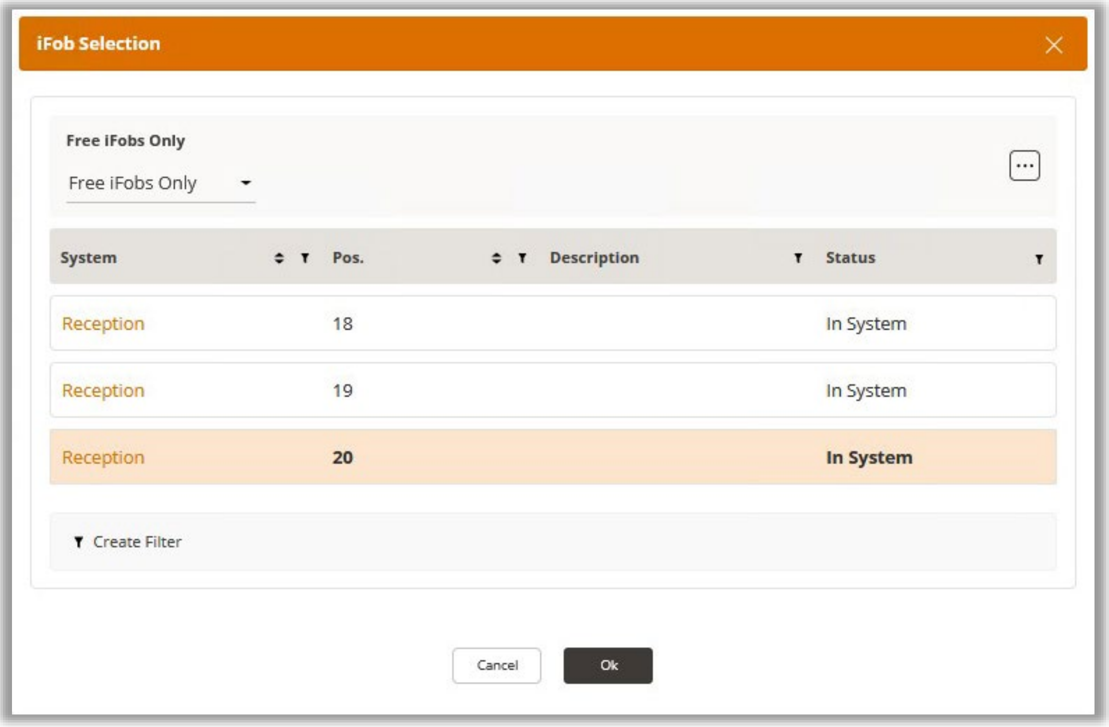
1. From the system viewer, highlight a position that currently does not have an item assigned. Then using the Toolbar, select the Edit Item button.
2. You will be presented with the Details page. Here, you can edit the details as required and select the item type from the drop-down menu.
3. Select the Item Type and then select the **Attach iFob** button.



The **iFob Selection** screen will now appear, showing a list of all the iFobs in the system that currently have not been assigned items. From the drop-down menu on the Toolbar, it is possible to view **All iFobs** or **Free iFobs Only.**

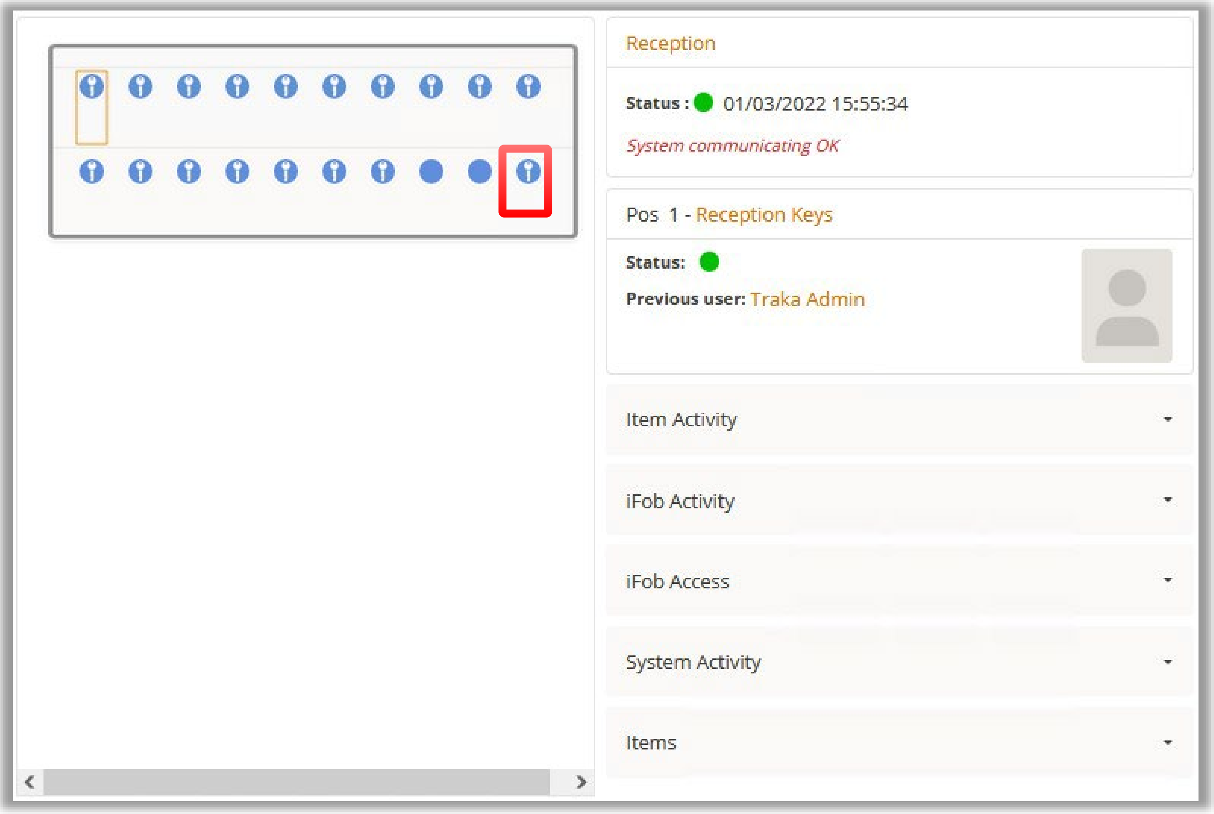


4. Select an iFob that you wish to add the item to.



5. Once you have made your selection, click on **OK** and you will return to the **New Item** page.
6. Click on the **Save** button to complete the process.

On returning to the System Viewer, you will now see the item has been added to the selected iFob. Repeat the process to add items to the remaining iFobs as required.



NOTE: It is possible to change headings of the detail fields by Editing the Item Type.

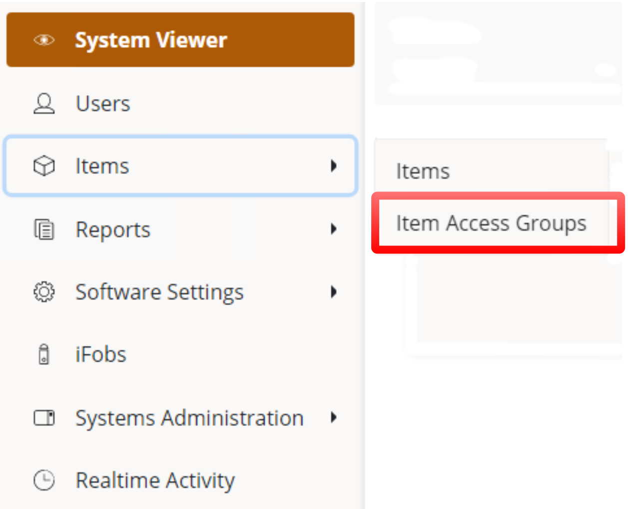
After you have entered all the required details click the Save and Return button. This will take you to the items list for the system you are currently viewing. Clicking the Cancel button will return you to the Item Types page without saving the new item details.

5.5 ITEM ACCESS GROUPS

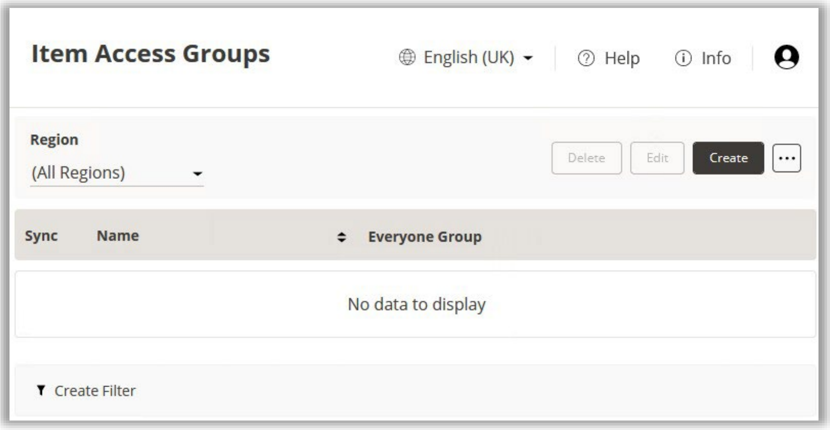
Item Access Groups allow you to restrict users to only being able to access certain items. They are particularly beneficial, as you do not need to give each user individual access to each item/system, which could take some time depending on how large your work force is. Groups work by allowing items (across multiple systems) to be accessed by a group. You can then give users access to the groups they need, therefore allowing the users to remove/return the items they need.

NOTE: For information on Common Item Access Groups, please refer to Random Return to Multiple Systems.

1. Select the Item Access Groups page via the Navigation Menu.

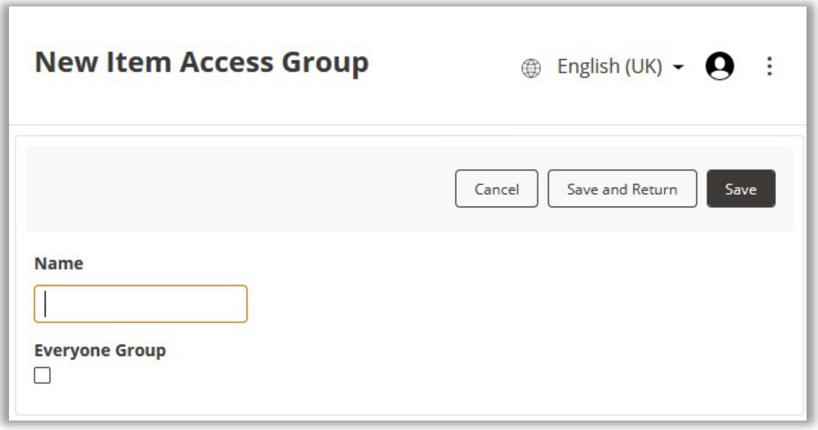


The Item Access Group list will then be displayed.

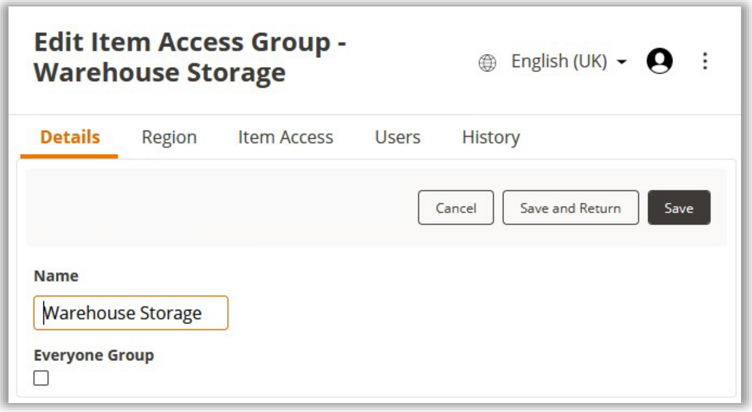


2. Click the **Create** button on the Toolbar.

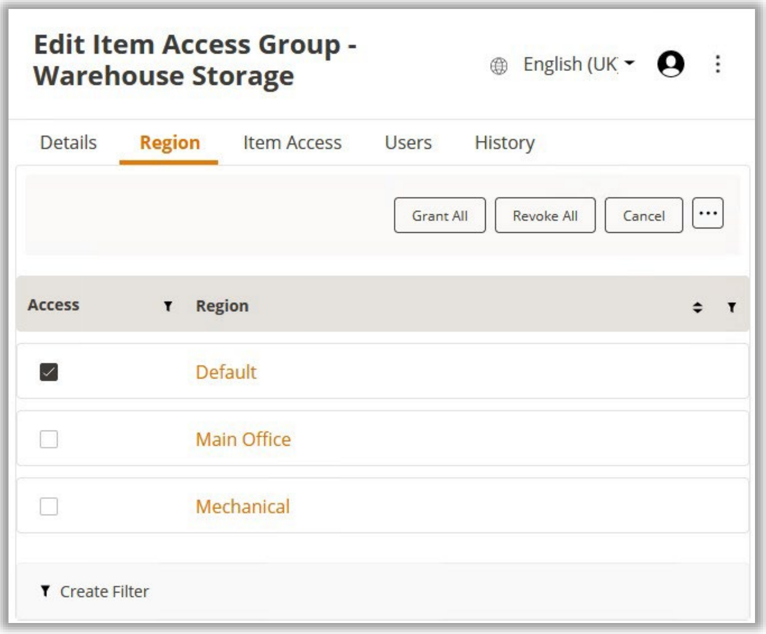
3. You will then be prompted to enter a group name.



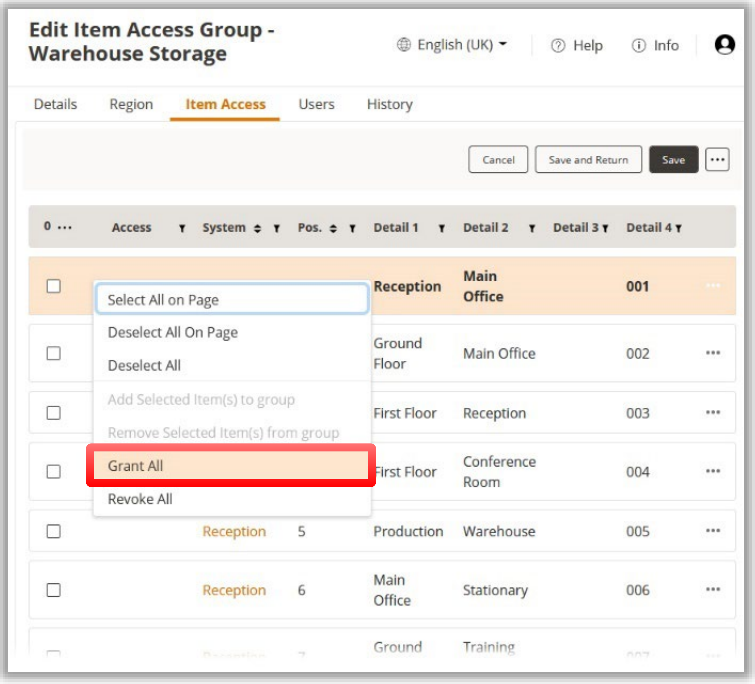
4. Click the **Save** button to enable the **Region**, **Item Access**, **Users** and **History** tabs. At this point, you can select the option **Everyone Group**. An 'Everyone Group' automatically makes all users a member of the Item Access Group (removing the need to manually add them to the group individually), where the User's region and Item Access Group's regions match.



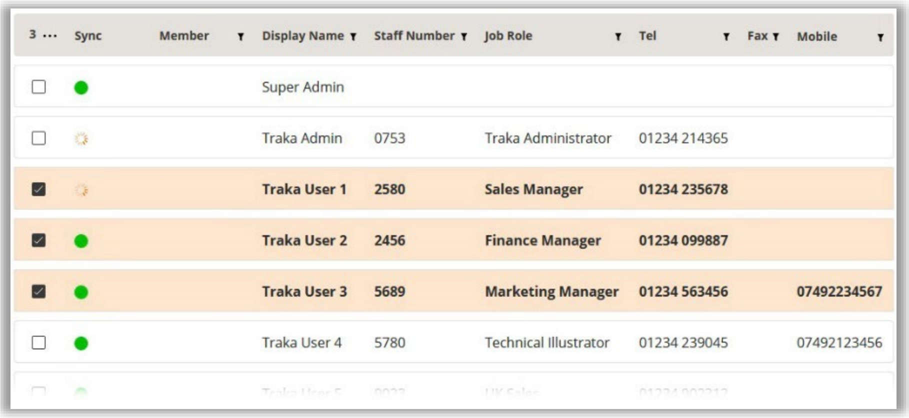
5. Next, select the region or regions you wish to apply to the group.



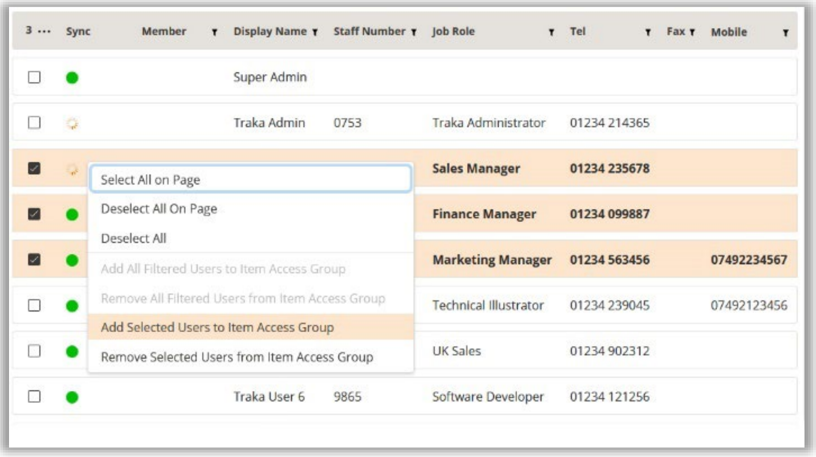
6. The Item Access list will display all the items in the database. The items listed here will depend on what systems are in the region/s you selected on the previous page. Here you can select which items the group will have access to. Simply check the box in the access column for the relevant items. Alternately, you can right click within the grid and select **Grant All** from the context menu.



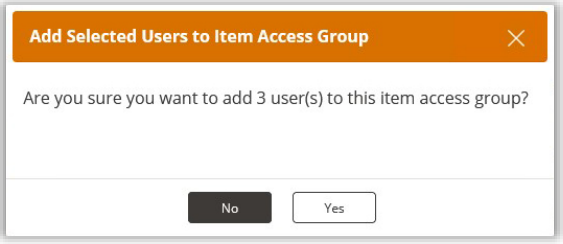
7. The Users tab will display a list of available users. To add users to the group, you can select them individually by left clicking on the checkbox to the left of the user.



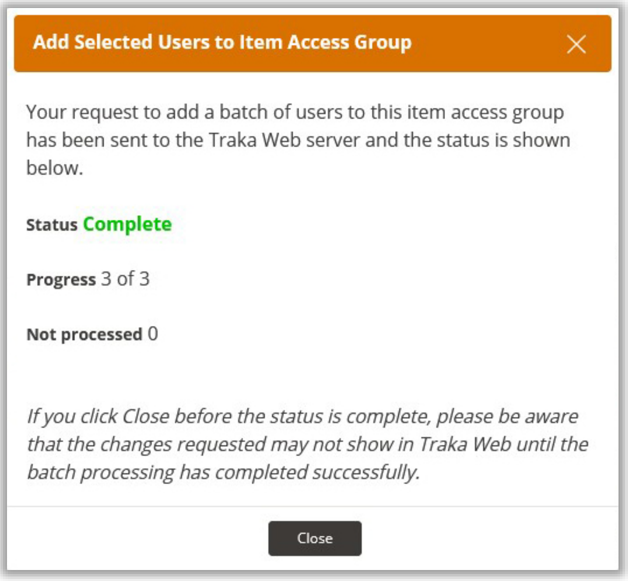
8. To add them to the current group, right click and select the option from the context menu.



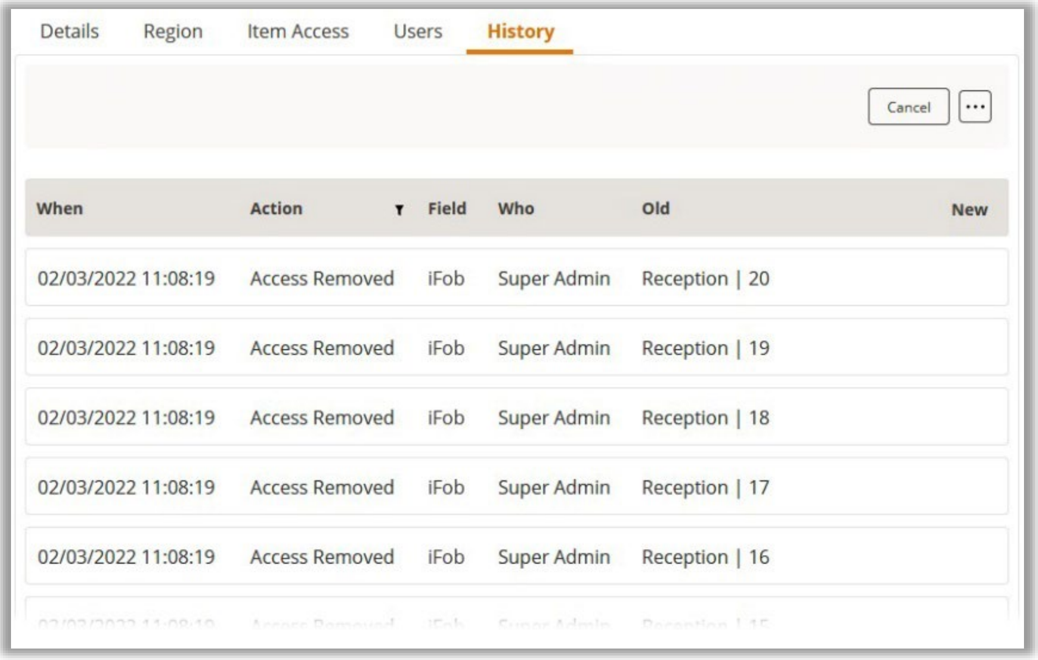
9. A message will appear requesting confirmation. Click on **Yes,** to continue.



10. The selected users will now be added to the Item Access Group. Once completed, click on **Close** to continue.



The History tab will enable you to view a record of any activity for the Item Access groups.



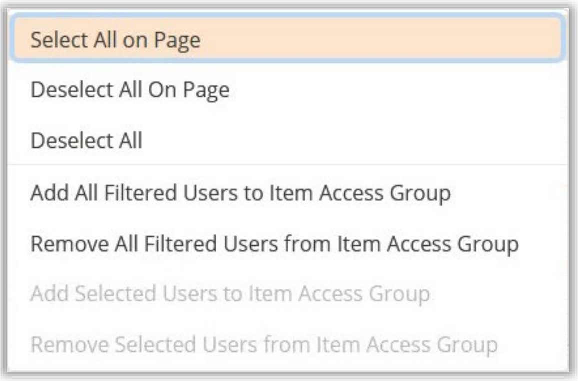
5.5.1 MULTI-SELECT/MULTI-EDIT (MSME)

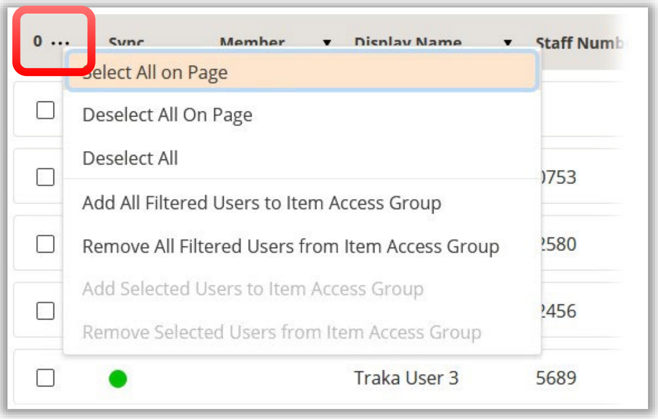
Item Access Groups

Using MSME to assign Users and Items to Item Access Groups utilises the same functionality as assigning Users to systems. A User with the Administrator role will be able to select one or more users by using a context menu and selecting which Item Access Group that they will become a member. As well as assigning users to an Item Access Group, they can also be removed.

The Context Menu

The Context Menu is central to the functionality of Multi-Select/Multi-Edit and is available by right clicking the mouse within the grid or left clicking on the Ellipsis option above the check box column. This will display a menu with a series of options. Greyed-out options will only be made available if one or more users have been selected.





Select All on Page

Selecting this option will enable the user to select all the users listed on the current page at once.

Deselect All on Page

This option will enable the user to deselect all the selected users on the current page at once.

Deselect All

If users are selected on one or more pages, this option will enable them all to be deselected at once.

Add All Filtered Users to Item Access Group

With a number of filtered users on a page such as users of the same job description for example, this option will enable you to add those users to a specific Item Access Group.

Remove All Filtered Users to Item Access Group

This option will enable you to remove all the filtered users on the page from a specific Item Access Group.

Add Users to Item Access Groups

This option will enable the user to assign selected users to a specific Item Access Group.

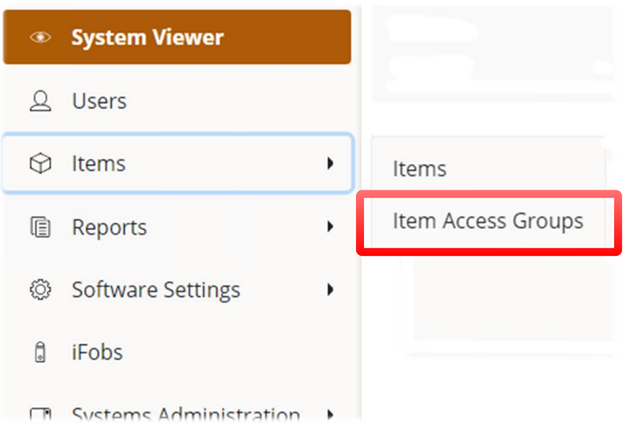
Remove Users from Item Access Group

Choosing this option will enable the user to remove one or more users from a specific Item Access Group.

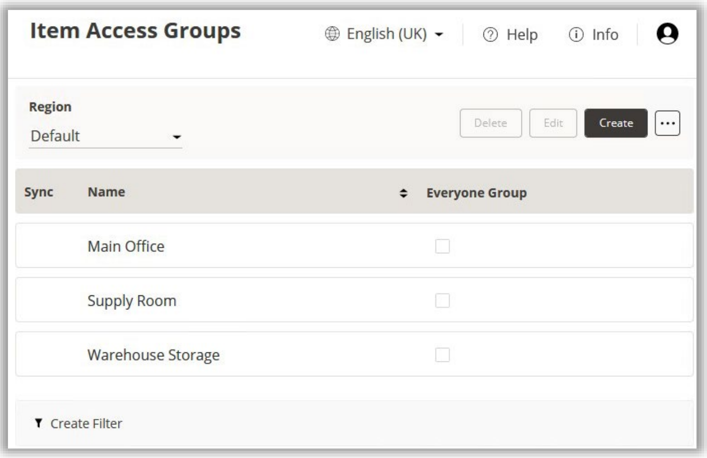
Selecting Item Access Groups

You will be required to have one or more Item Access Groups created to proceed with using the MSME functionality. Information for creating Item Access Groups can be found in the Item Access Groups section.

1. From the Navigation Menu, select **Item Access Groups** from the **Items** tab.



You will then be taken to the Item Access Groups page. If any item access groups already exist, they will be shown here.

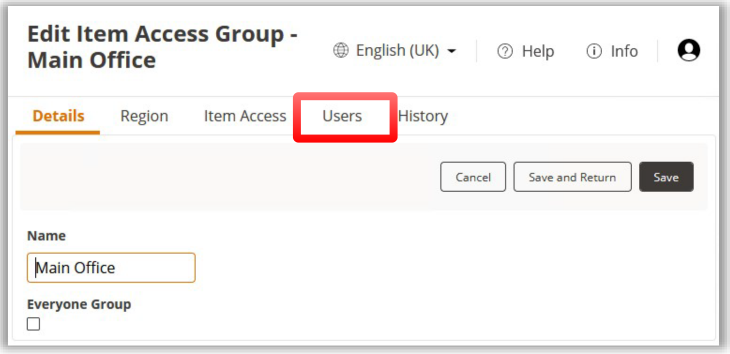


2. Select a group by double clicking on it or by selecting it and then clicking on the **Edit** button.

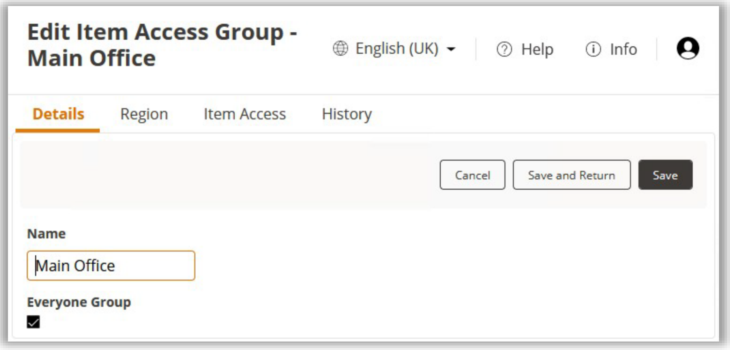
You will now be directed to the Edit Item Access page.

Selecting Users to Assign to Item Access Groups

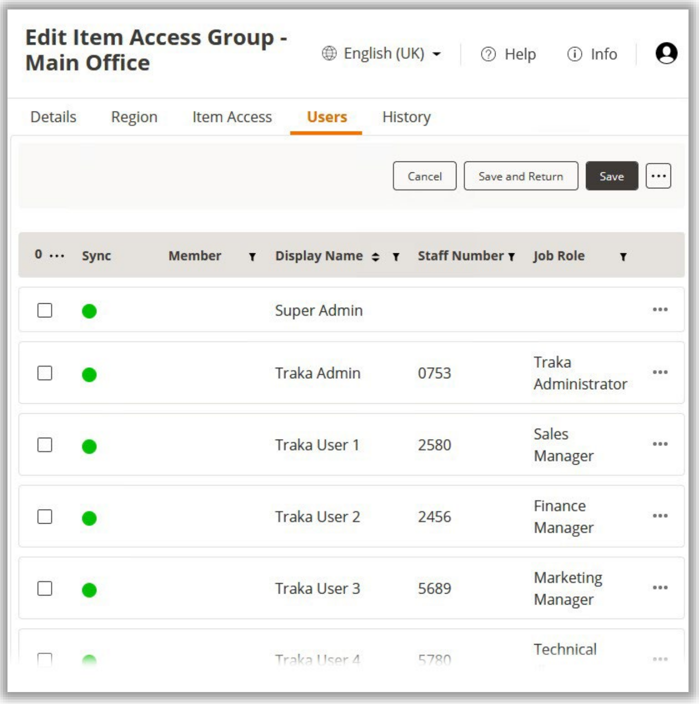
1. From the Edit Item Access Group page, select the **Users** tab.



NOTE: If any of the Item Access Groups have the Everyone Group option ticked, the Users tab will not be available.

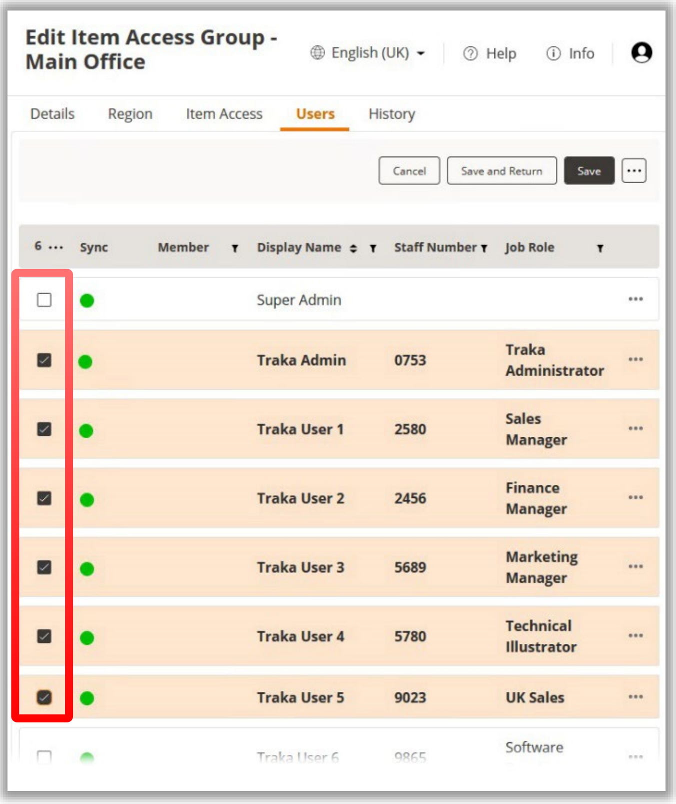


The next page will display all the available user details.



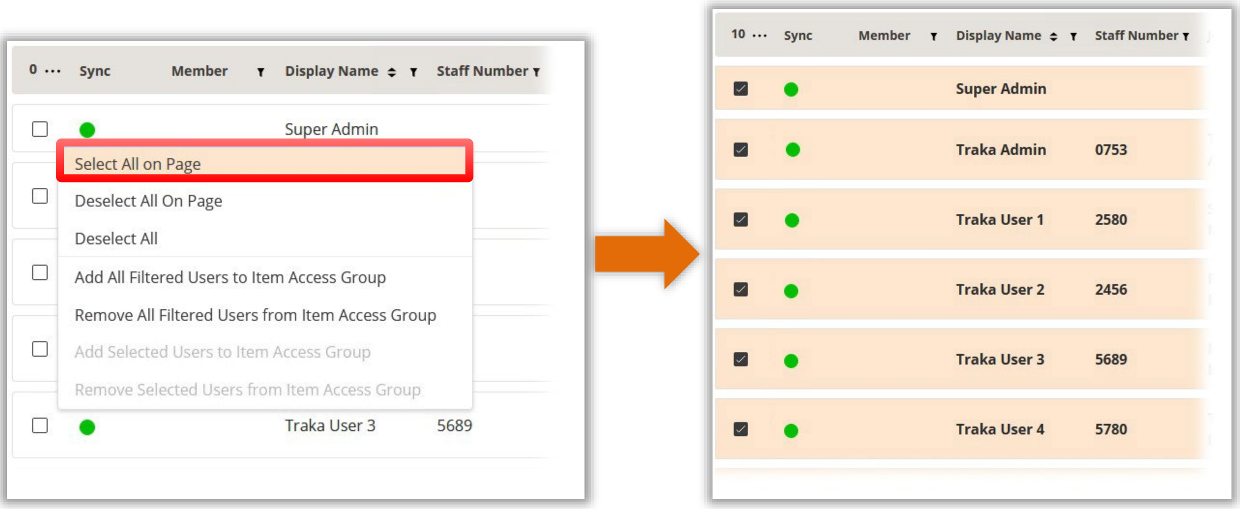
NOTE: It will be noticed that there is an empty column titled 'Member'. For users that are assigned to groups, the corresponding Member box will be ticked.

2. Select individual users to assign to the Item Access Group by clicking on the check boxes to the left.



NOTE: Above the check box column, the number of selected users is displayed.

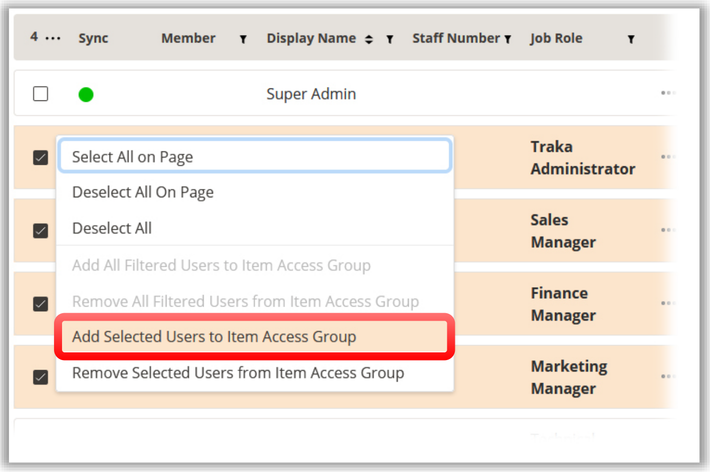
3. If you wish to select all the users on the page, right click and choose **Select All on Page**.



This will select all the check boxes for all users on the current page only. You may also choose to **Deselect All on Page** or, if there are users selected over multiple pages, you can **Deselect All**.

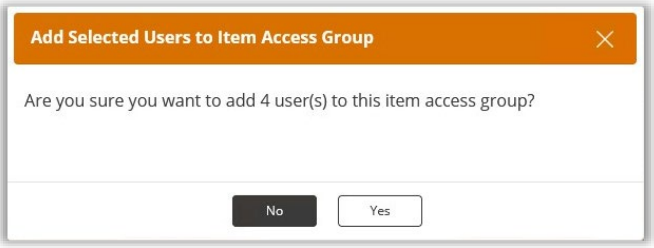
Add Users to Item Access Groups

1. With the users selected, right-click and select **Add Selected Users to Item Access Group.**

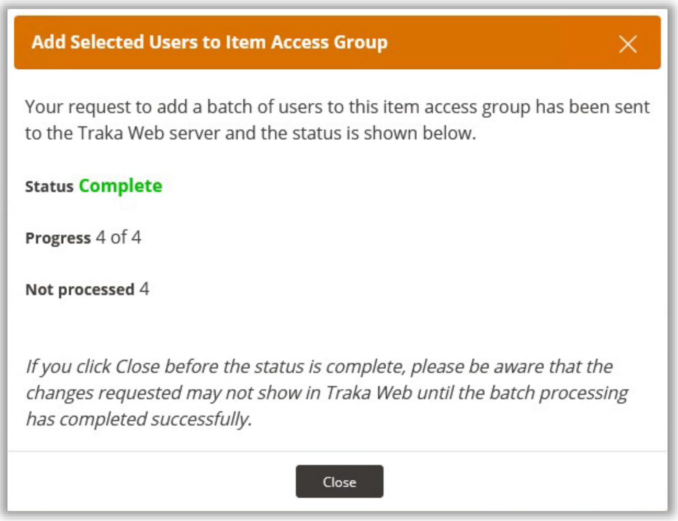


You will be presented with a confirmation window asking if you wish to add the selected users to the Item Access Group. Selecting **No** will return you to the list of user details.

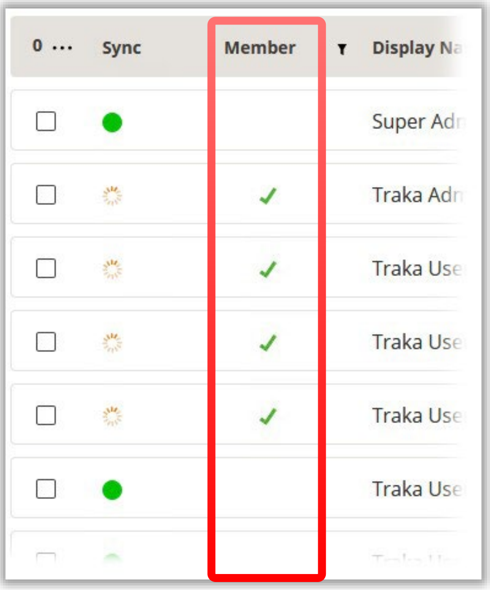
1. Click on **Yes** to proceed.



A window will appear displaying the progress and status. Once completed, click on the **Close** button. If the process was successful, the selected users will be added to the Item Access Group.



The Users page will now be updated. A tick is visible in the Member column for all users assigned to that group.



NOTE: The tick in the Member column will only appear for users who are members of the selected Item Access Group.

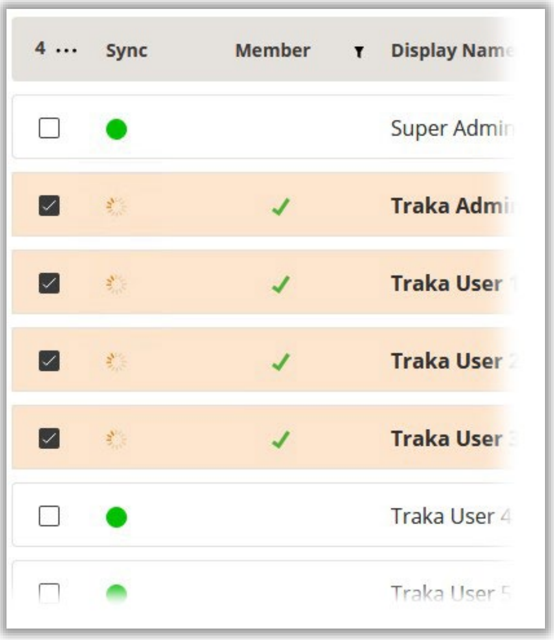
The process can then be repeated for assigning users as members of other Item Access Groups.

Remove Users from Item Access Groups

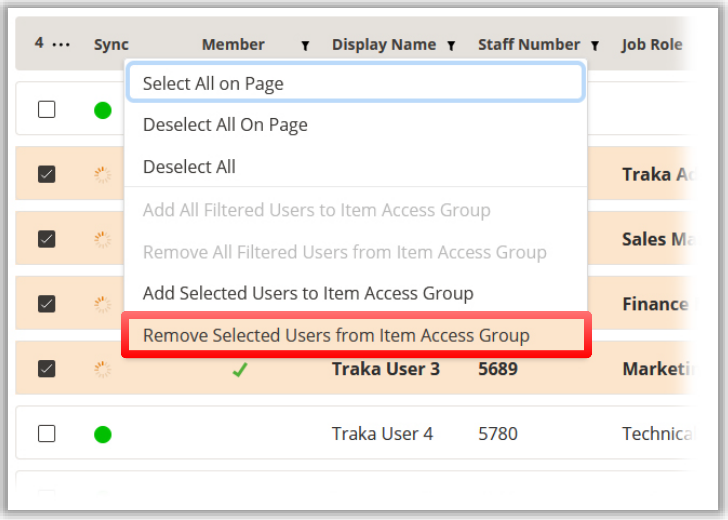
As well as adding users to an Item Access Group, it may also be necessary to remove one or more users from an Item Access Group.

1. Select the Item Access Group from which you wish to remove user access and then click on the Users tab.

2. Select the assigned users that you wish to remove from that group.

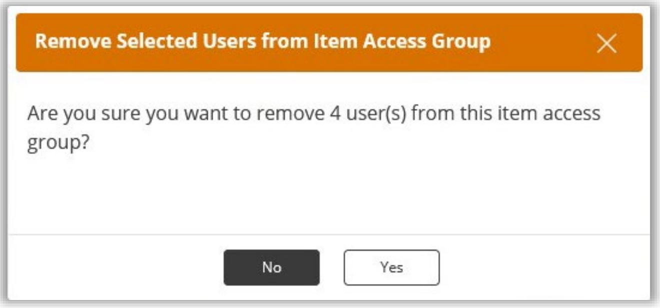


3. Right click and choose the option **Remove Selected Users from Item Access Group.**

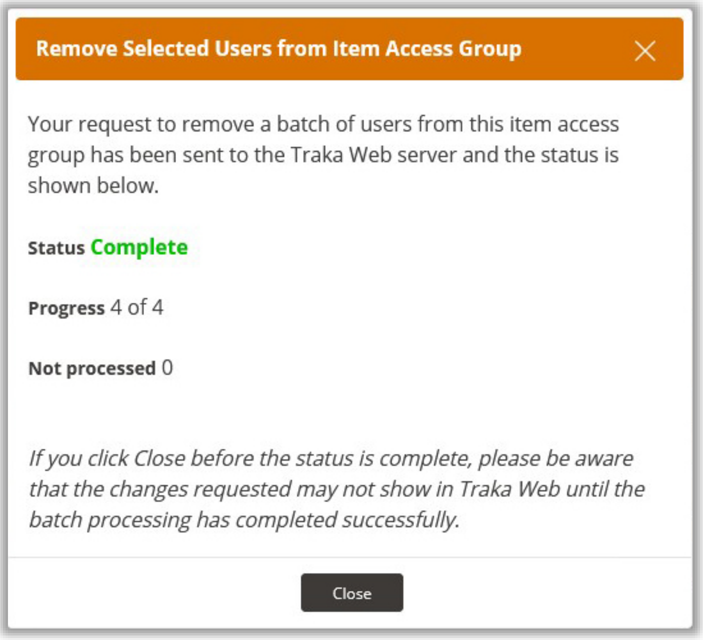


You will be presented with a confirmation window asking if you wish to remove the selected users from the Item Access Group. Selecting **No** will return you to the user details list.

1. Click on **Yes** to proceed.



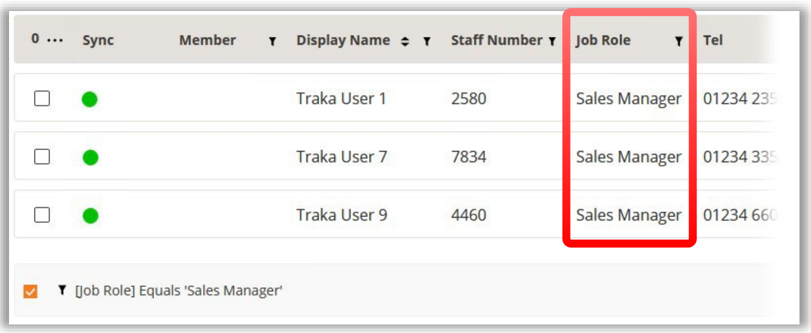
A window will appear displaying the progress and status. Once completed, click on the **Close** button. If the process was successful, the selected users will be removed from the Item Access Group.



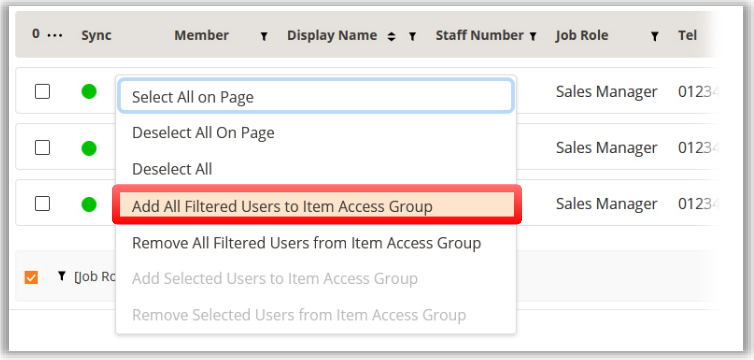
Using the Filtering Option

Using the filtering option for Users in MSME is very similar to adding and removing selected users. The following is an example of using an applied filter to the Job Role column.

1. Apply the filter to the column. In this example, the job role of Sales Manager is used.



2. Next, right-click within the grid and select the option for **Add All Filtered Users to Item Access Group.**

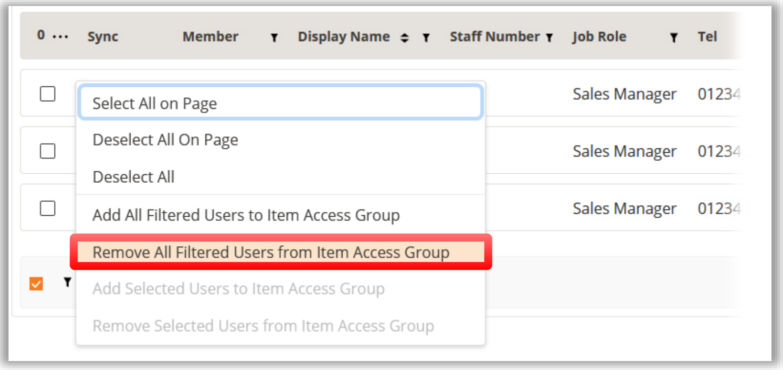


The process for adding will now proceed according to the process used for **Add Selected Users to Item Access Group.**

NOTE: If individual users have been selected from the filtered column, the Add Selected Users to Item Access Group will apply.

Removing filtered users is also very similar to the process for **Remove Selected Users from Item Access Group.**

3. With the filter in place, right-click within the grid and select **Remove All Filtered Users from Item Access Group.**



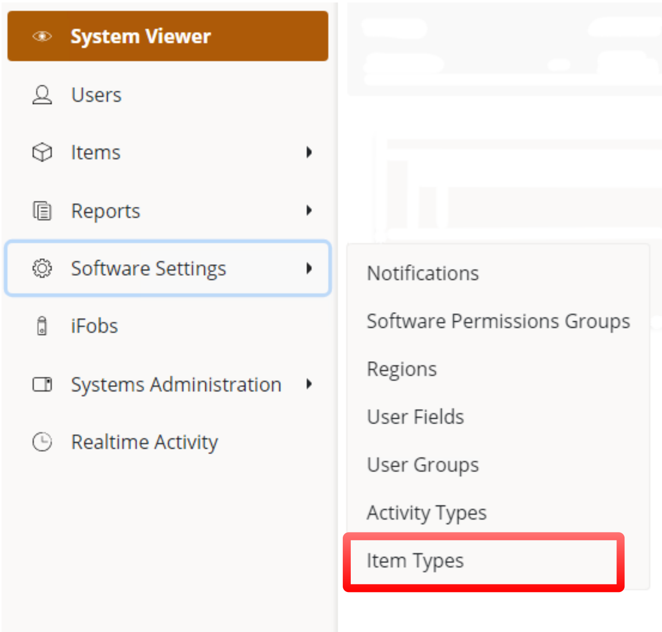
The removal process will now proceed according to the process used for **Remove Selected Users to Item Access Group.**

NOTE: If individual users have been selected from the filtered column, the Remove Selected Users from Item Access Group will apply.

5.6 ITEM TYPES

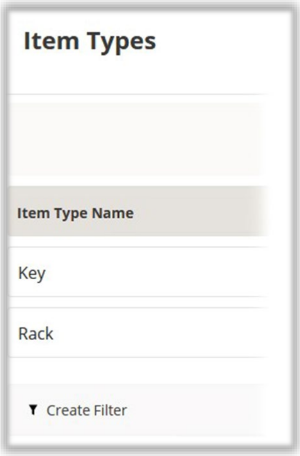
In TrakaWEB, you can create your own item types that you can later assign to positions. This is useful as you may for example, have many different types of 'key' instead of one generic term to fit many types, e.g. Car Keys, Door Keys, and Building Keys etc. Alternatively, in a locker system for example you may have Radio, Laptop, and Mobile Phone etc.

1. Select Software Settings from the Navigation Menu and from there, click the Item Types tab.



This will take you to the Item Types list where all the existing items are displayed. By default, TrakaWEB has a standard item type called 'Key' ready to be used. From here, you can add, edit and delete item types along with using the search tool to find specific items and finally exporting the item data to an Excel Spreadsheet or PDF document.

You can assign multiple items of the same type to any position in the system.

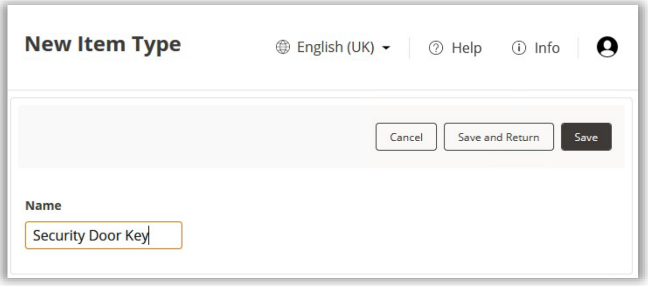


5.6.1 ADDING NEW ITEM TYPES

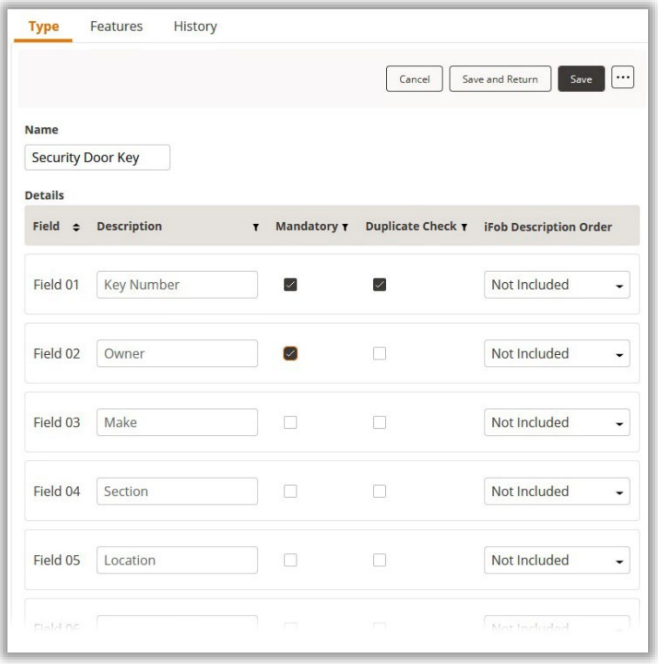
To create a new Item Type, you must click Software Settings and select the Item Type tab from the Navigation Menu.

1. The current item type list will then be displayed. If you have never added an Item Type before then you will see the TrakaWEB default item types, **Key** and **Rack**. To add another type, click the **Create** button.

The **New Item Type** page will now appear. Here you can specify a name for the item type.



2. Click the save button. You will then be taken to the details page. Here you can enter the information that relates to the item type.



Description

There are eleven fields that you can enter details about the new item type e.g., if it is a key, you may want to add a description such as make, owner or model etc.

Mandatory Tick Box

Checking this box will force the logged in TrakaWEB administrator to populate that particular field when adding this item to a position. E.g., if the mandatory check box was selected for the field 'Key Number', when the TrakaWEB administrator next creates a new item from this item type they will be forced to enter data into the 'Key Number' field before they are allowed to continue.

Duplicate Check Tick Box

Checking this box will allow TrakaWEB to search if the identical credentials have been entered against the same field to another item before the details are saved. E.g., if the duplicate check box was ticked for the field 'Key Number' and a

TrakaWEB administrator is creating a new item and attempts to enter a number that is already assigned to another item, TrakaWEB will inform you and will not allow you to continue.

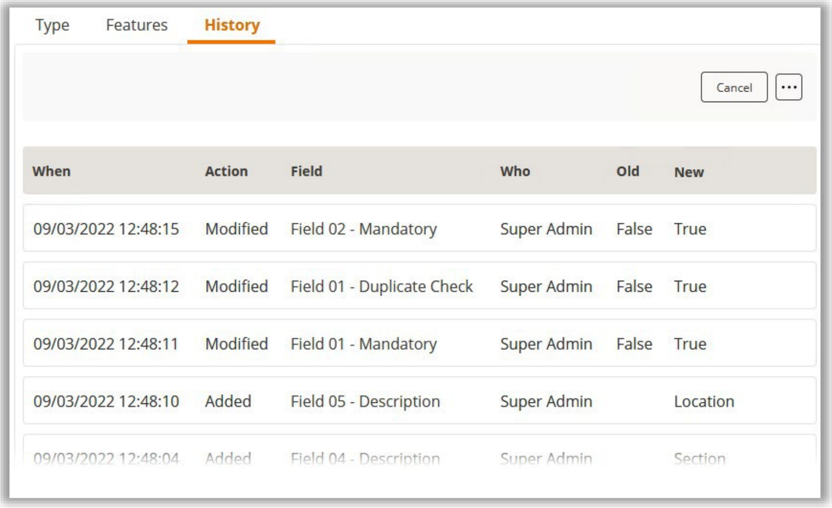
iFob Description Order

You can select which fields you want as the iFob descriptions (if any). Simply use the drop-down selection boxes and set them in numerical order.

3. Once you have selected the desired options, click the Save and Return button to go back to the previous page or click the history tab to view past records of changes you have made to each field.

History Tab

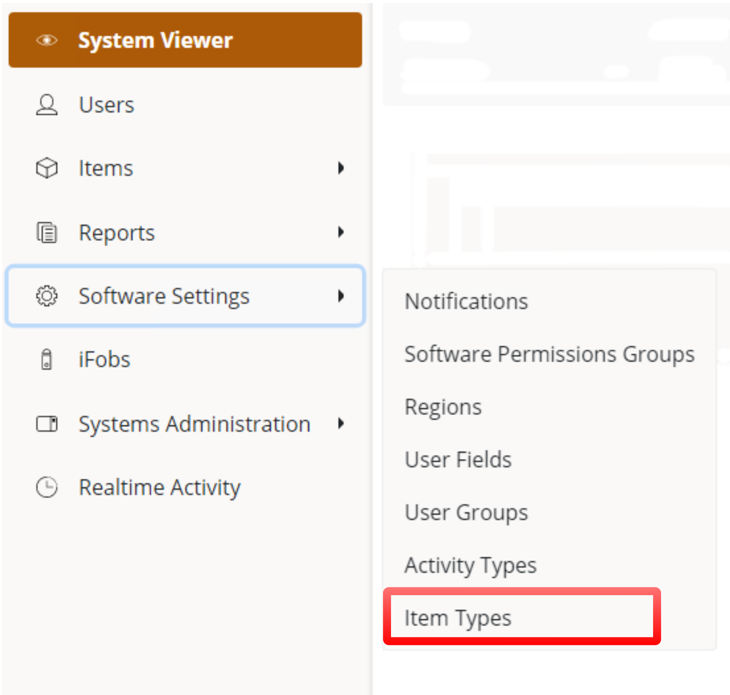
This tab keeps a record of all the changes made to each field name and the user who made them. This is useful if you ever want to know what the field titles used to be.



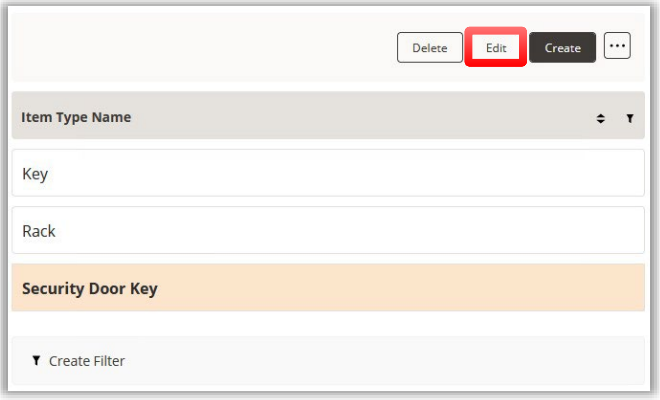
Once complete, you can now navigate to the Items section via the Navigation Menu and begin to create as many items of that item type that you require. Please see the Adding an Item to an iFob topic for more details.

5.6.2 EDITING ITEM TYPES

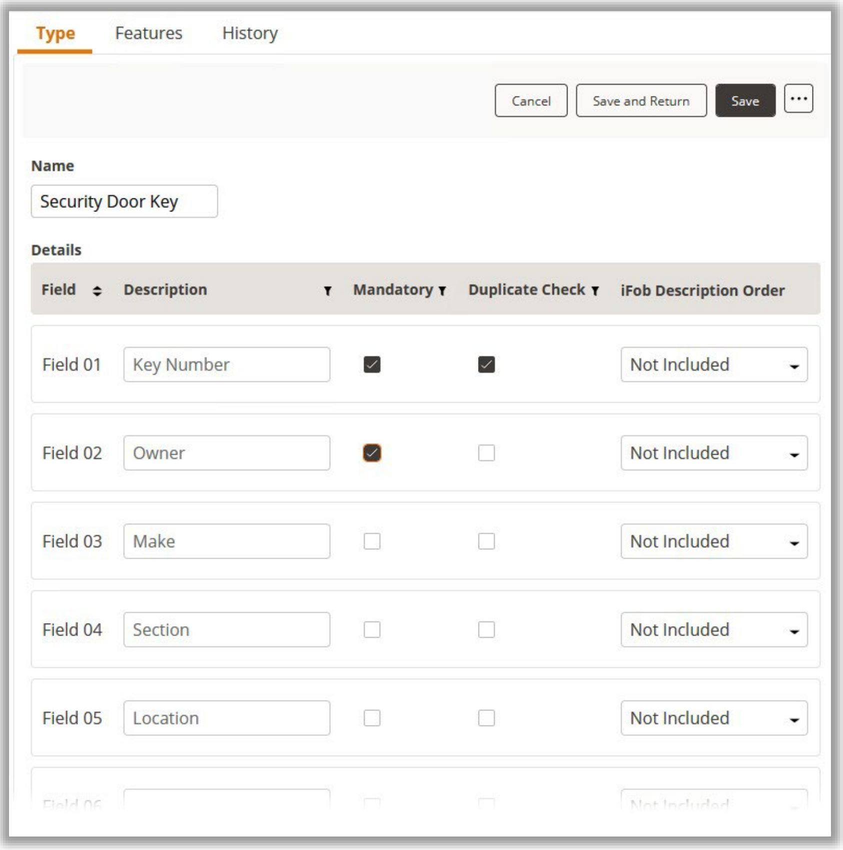
1. Select Software Settings from the Navigation Menu and from there, click the Item Types button.



2. Once the Item list appears, highlight the desired item, and select the Edit button. In this example, Security Door Key has been selected.



3. The Item details page will now appear. Here you can change the name of the item itself and the eleven definable fields that relate to the Item Type.



5.7 REPORTS

5.7.1 REPORTS OVERVIEW

Reports are a compilation of information or activities that have occurred at the system. There are seven standard categories of reports within TrakaWEB; each category has one or more reports to generate. Please use the links below to view the appropriate report category.

Reports:

[Scheduled Reports]

[Filtered Reports]

View Reports:

[General Reports]

[Status Reports]

[Exceptions Reports]

[Permissions Reports]

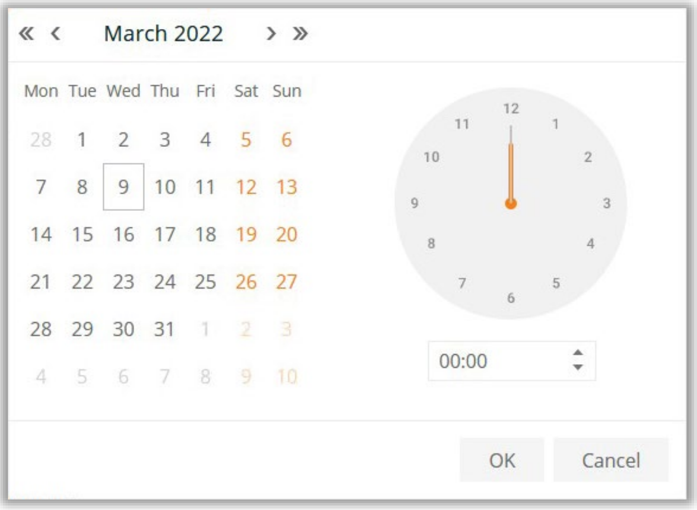
[Regions Reports]

[Utilisation Reports]

[Diagnostics Reports]

NOTE: Only Optional Features that have been enabled will be displayed in the reports screen. For information regarding Cost Option reports, please refer to the Feature Options section.

Most of the reports in TrakaWEB use a start and end date to filter search results. Clicking the arrow next to start time/end time will show a small calendar allowing you to select specific times from which you wish the report to retrieve data.



5.7.2 SCHEDULED REPORTS

Scheduled Reports is a non-cost option feature that may be set up by the user as required. A maximum of 500 reports may be created and once configured, the Scheduled Report can be submitted as an email notification in either PDF or Excel format. For more information on setting up and configuring Scheduled Reports, please refer to the Scheduled Reports section.

5.7.3 FILTERED REPORTS

The Filtered Reports is a non-cost option feature that may be setup by the user as required. A Filtered Report can be configured by the end-user and then combined with the Scheduled Reports feature. For more information on the setup and configuration of Filtered Reports, please refer to the Filtered Reports section.

5.7.4 GENERAL REPORTS

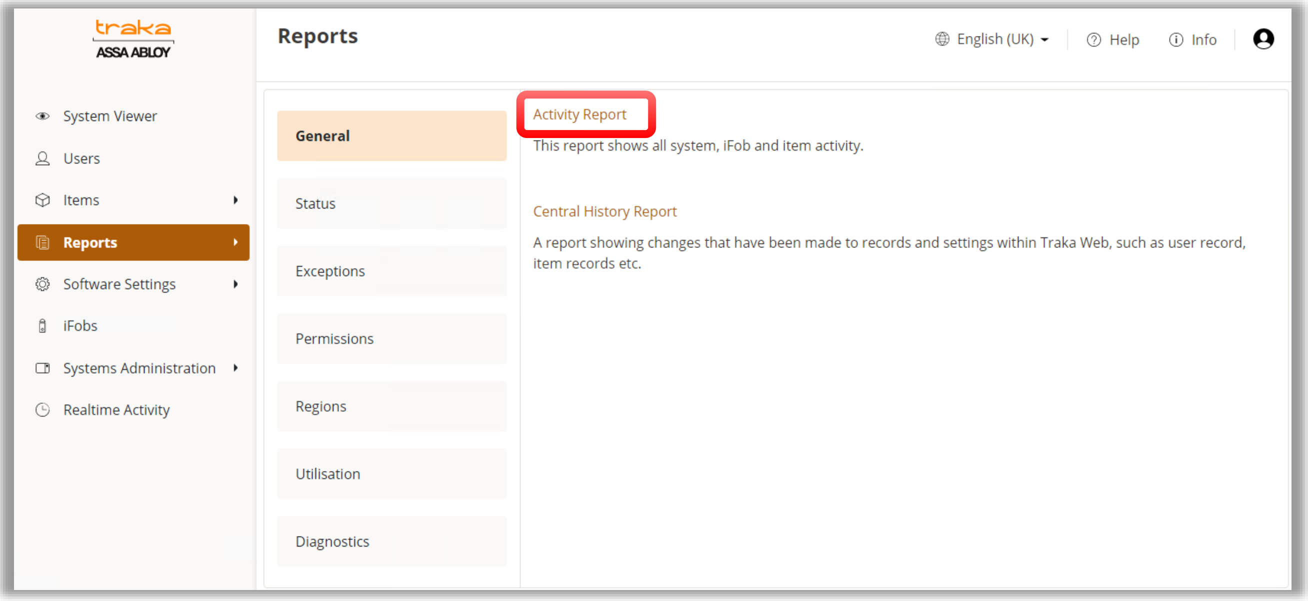
The General Reports comprises of 2 report categories:

- Activity Report
- Central History Report

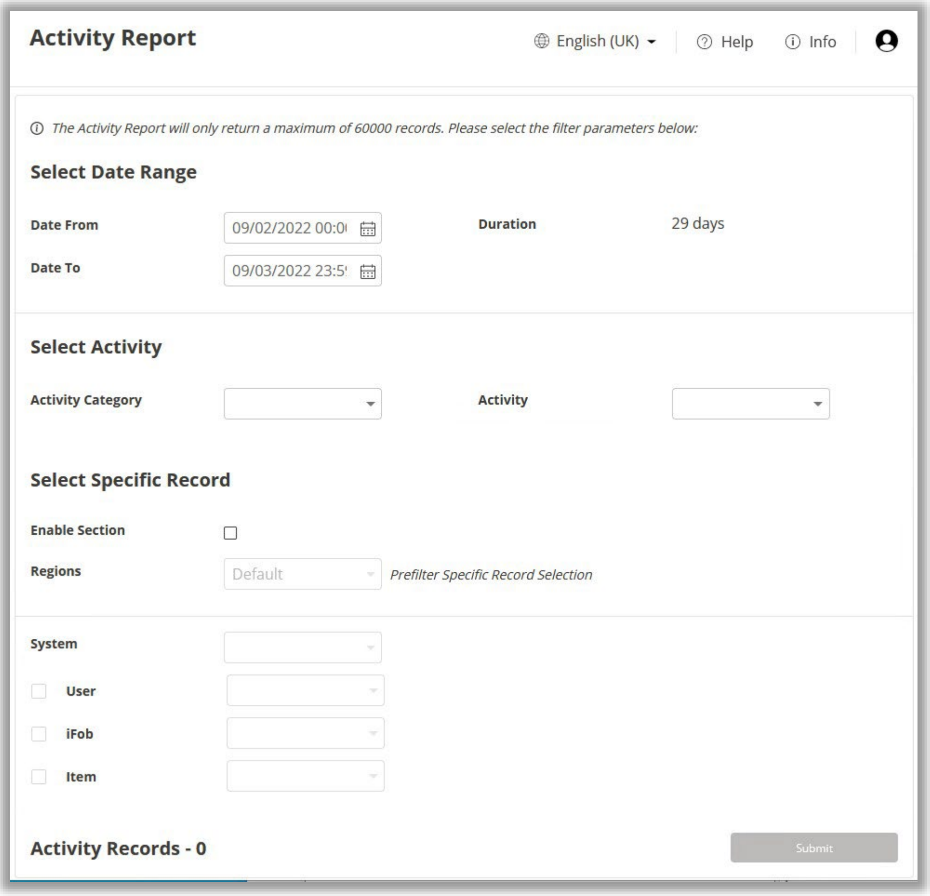
Activity Report

The Activity Report provides a pre-filter page specific to all system, iFob and Item Activity. It is divided into 3 sections to allow for a date range, activity type and a specific record selection. It will allow a maximum return of 60,000 records.

1. Click the **Reports** tab on the Navigation Menu.
2. Select the **View Reports** tab followed by the **General** tab.
3. To view the Activity Report, click on the link.



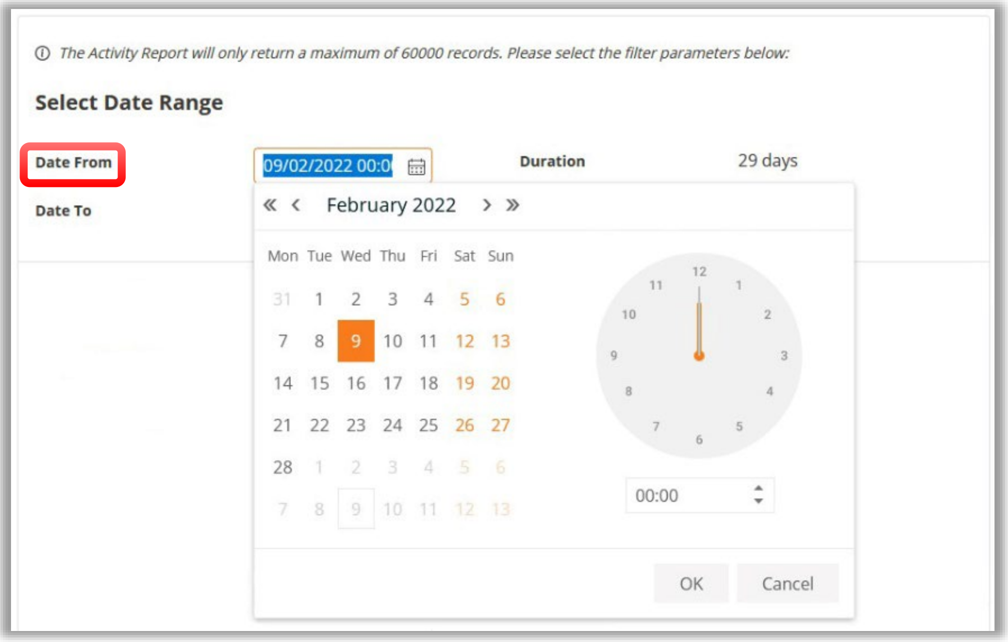
You will now be presented with the pre-filter page for the Activity Report.

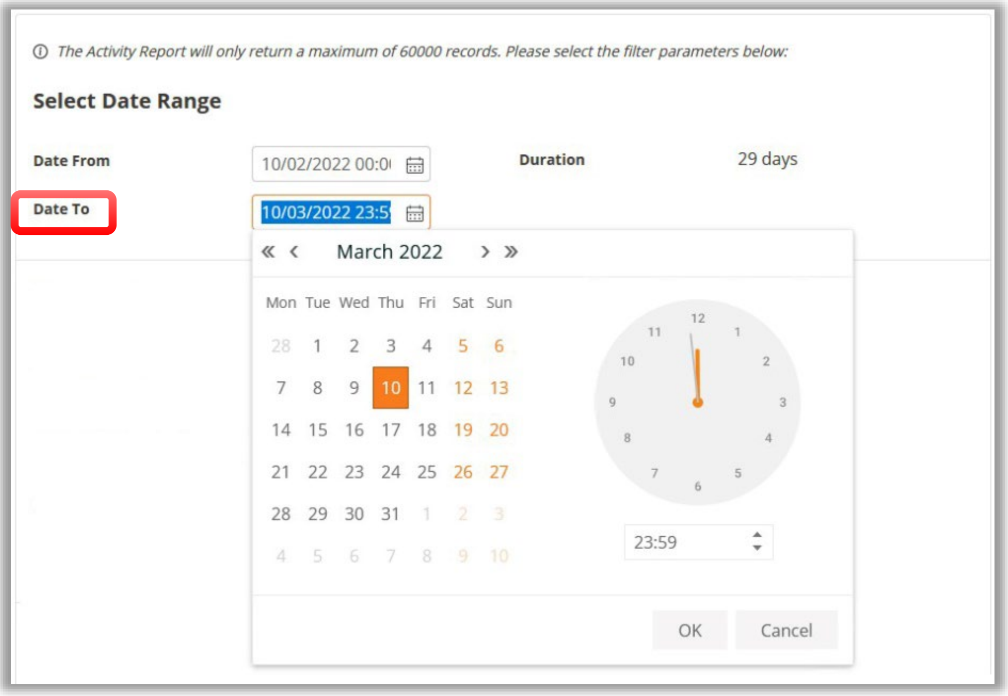


From the above example, the pre-filter page is divided up into 3 steps, concluding with a Submit option.

Step 1: Select Date Range

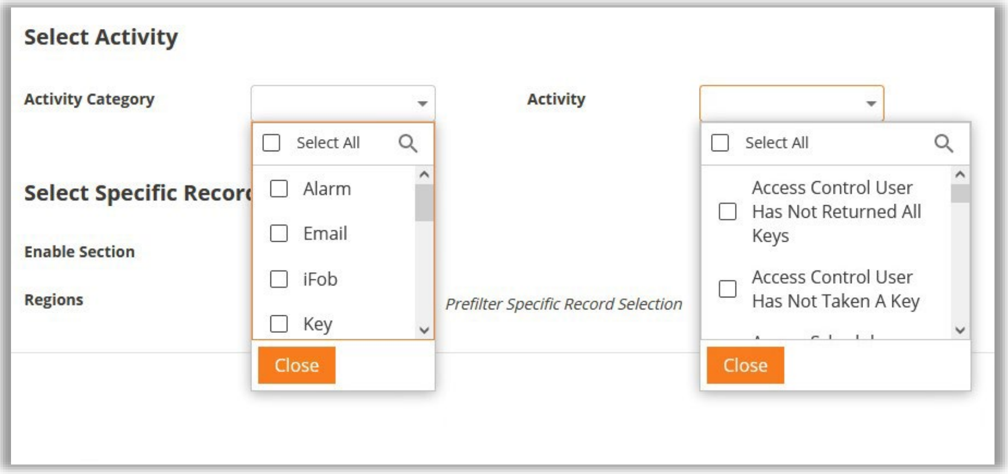
The **Select Date Range** comprises of 2 drop-down options to allow you to select both a start date and an end date. It will also display the overall duration.





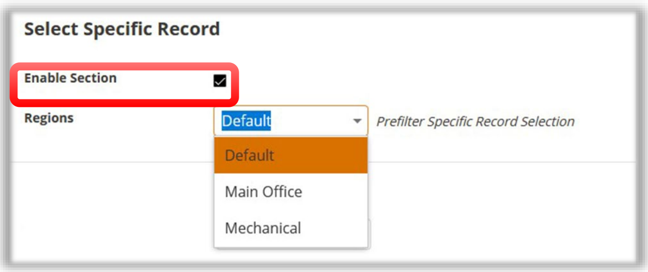
Step 2: Select Activity

The **Select Activity** comprises of 2 drop-down menus. From the **Activity Category** menu, you can select from a list of different categories. These can be either selected individually or all at once. From the **Activity** menu, you can select from a list of different activities. These also can be selected individually or all at once.

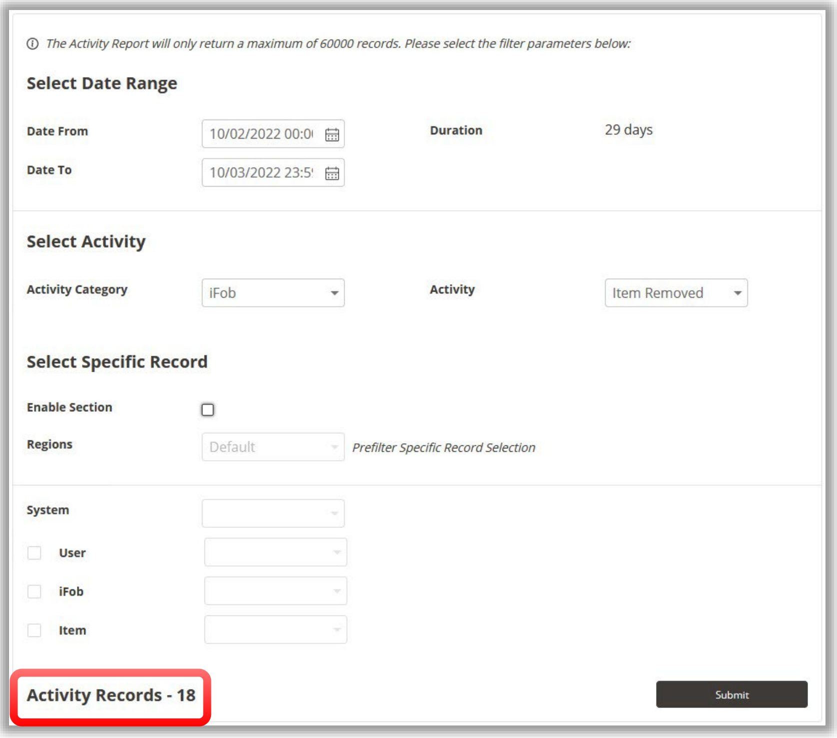


Step 3: Select Specific Record

The **Select Specific Record** is an optional step. It can be enabled by selecting the **Enable Section** checkbox as shown below. With the option enabled, you may then select a specific region.

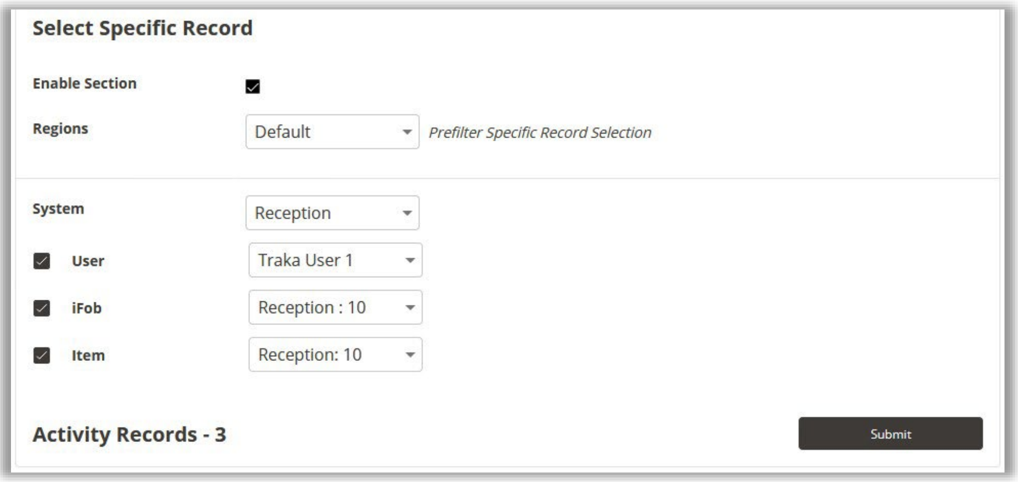


NOTE: If the checkbox is not selected, activity records will still be generated for the options selected in Step 2 as shown in the example below.



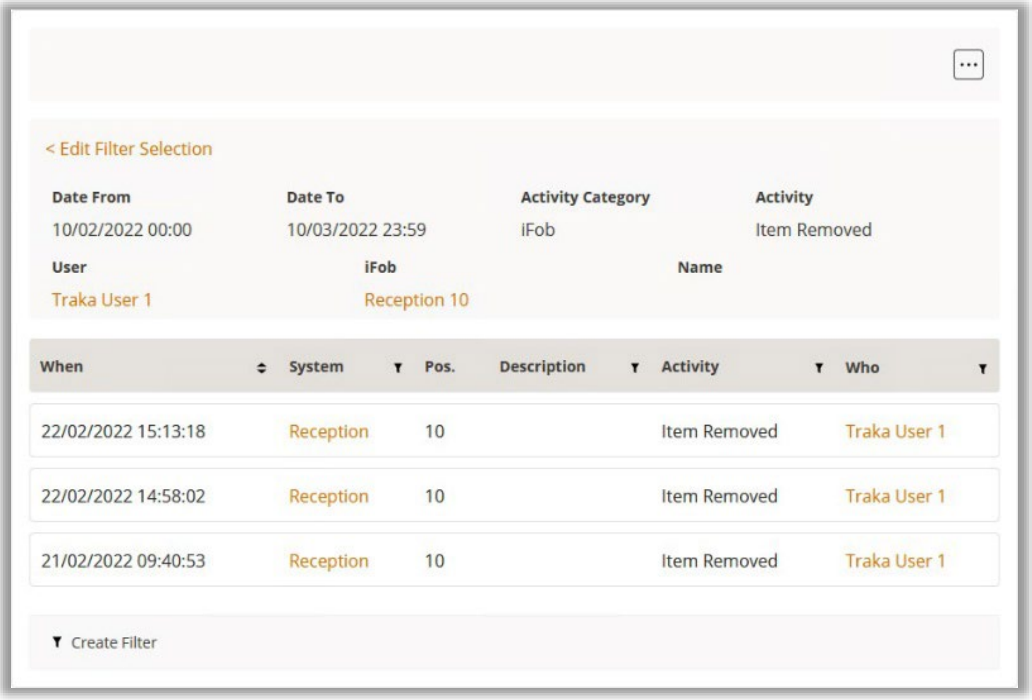
With the **Enable Section** checkbox selected, you will also be able to choose a system from the selected region, a User, an iFob, and an Item as required by following the steps below.

1. From the **System** drop-down menu, select a system.
2. Select the **User** checkbox to choose a user from the User drop-down menu.
3. Select the **iFob** checkbox to choose an iFob from the iFob drop-down menu.
4. Select the **Item** checkbox to choose an item from the Item drop-down menu.

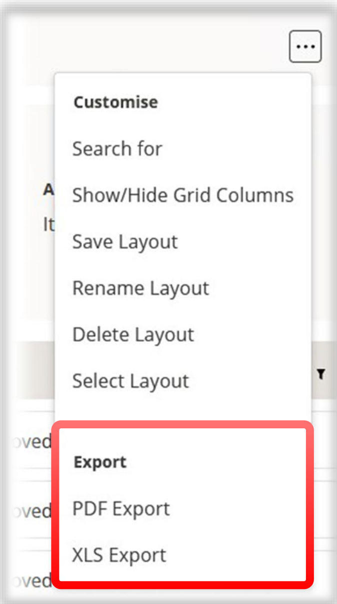


Once you have finished making your selections, click on the **Submit** button.

The final report will provide a summary of the options that were selected and the overall report for those options.



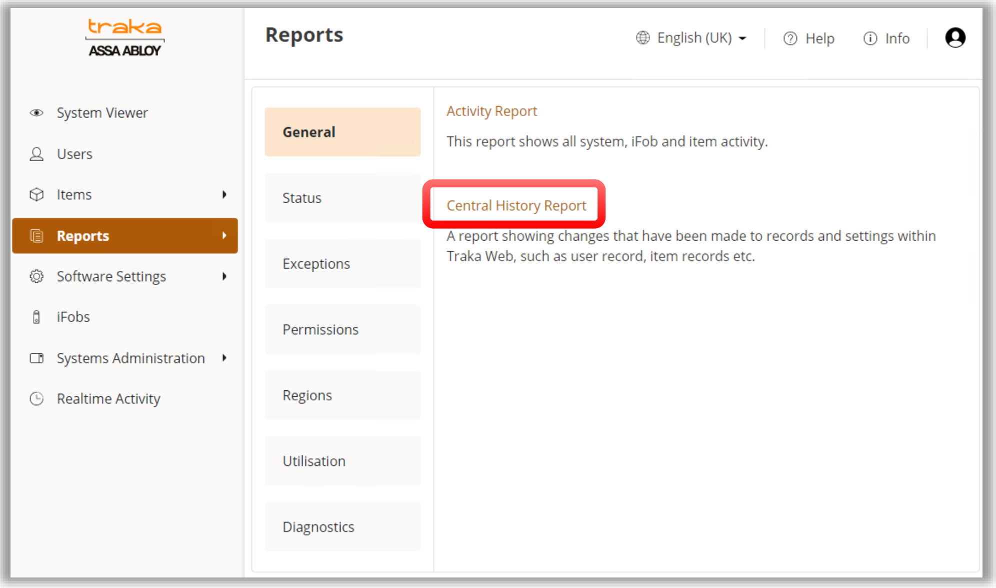
Selecting the Ellipsis button will allow you to export the Activity Report to an XLS or PDF file as required.



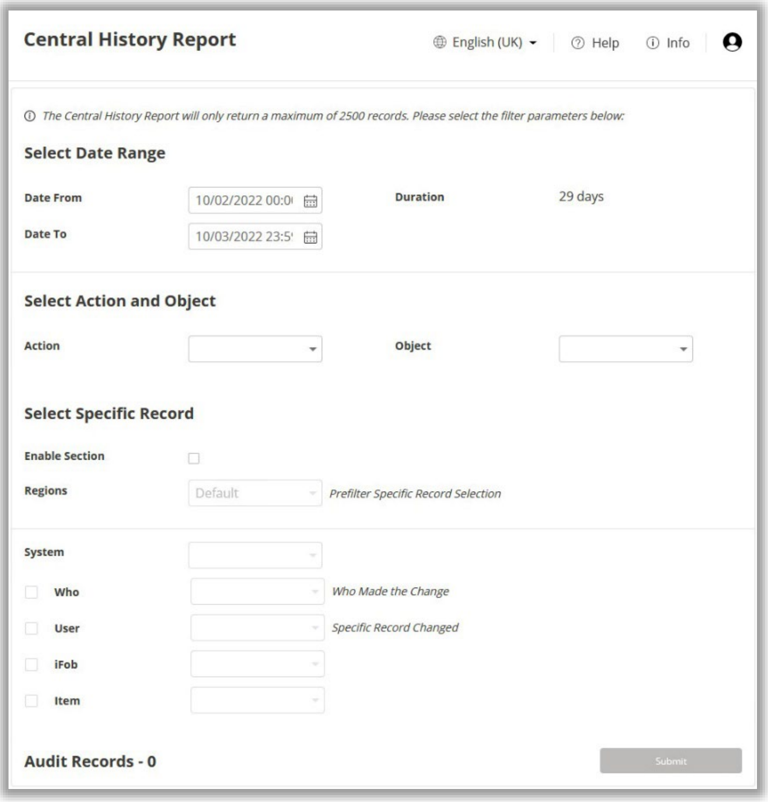
Central History Report

The Central History Report provides a pre-filter page that will show any changes that have been made to records and settings within TrakaWEB. It is divided into 3 sections to allow for date range, actions and a specific record selection. It will allow a maximum return of 2,500 records.

1. Click the **Reports** tab on the Navigation Menu.
2. Select the **View Reports** tab followed by the **General** tab.
3. To view the Central History Report, click on the link.



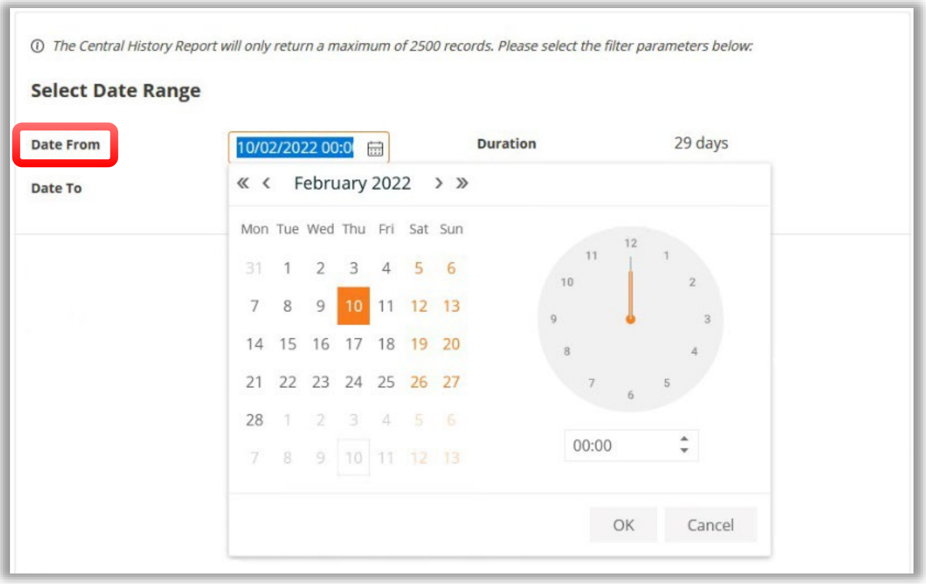
You will now be presented with the pre-filter page for the Central History Report.

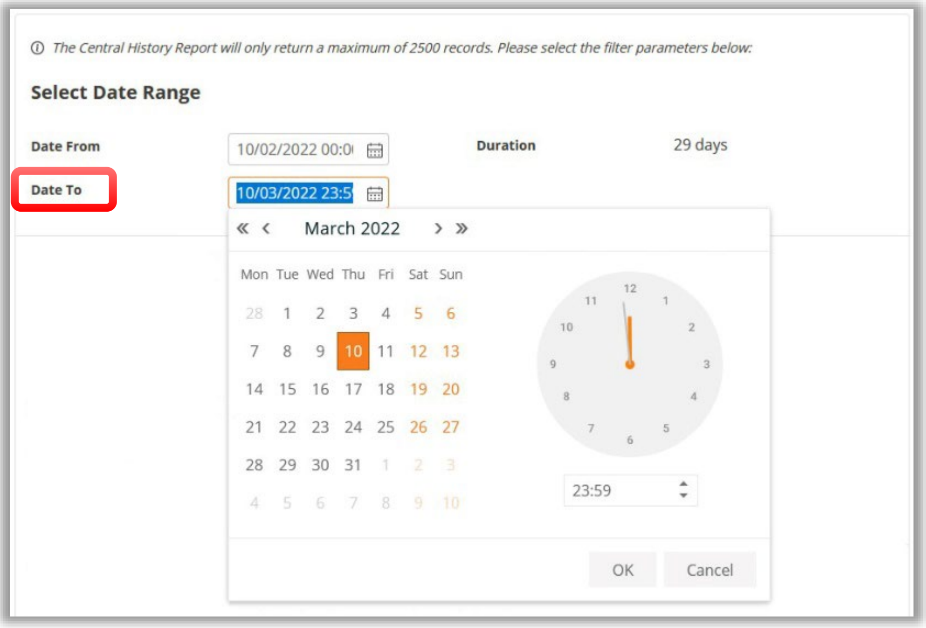


From the example above, the pre-filter page is divided up into 3 steps, concluding with a Submit option.

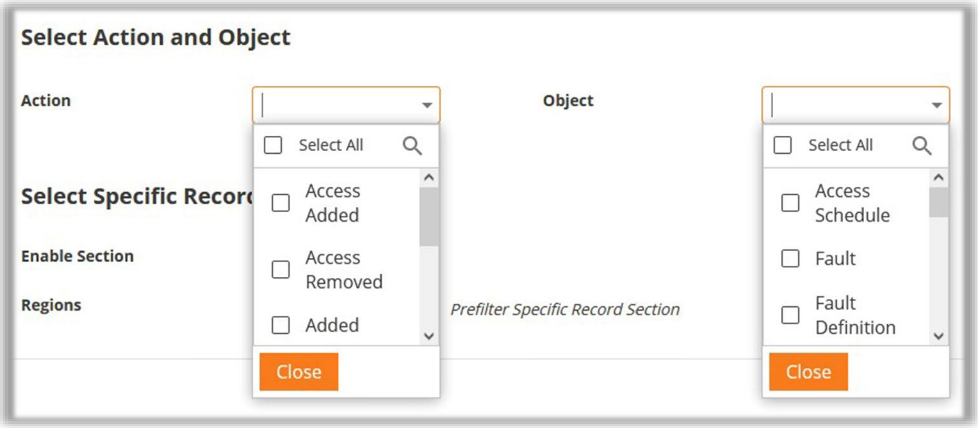
Step 1: Select Date Range

The **Select Date Range** comprises of 2 drop-down options to allow you to select both a start date and an end date. It will also display the overall duration.



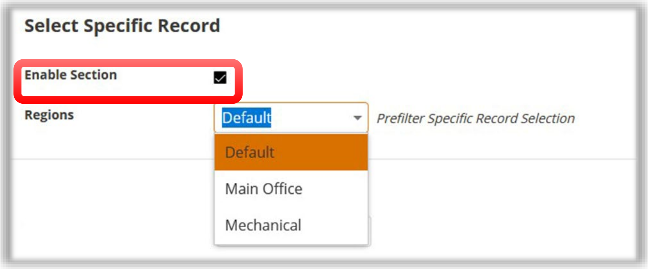


Step 2: Select Action and Object

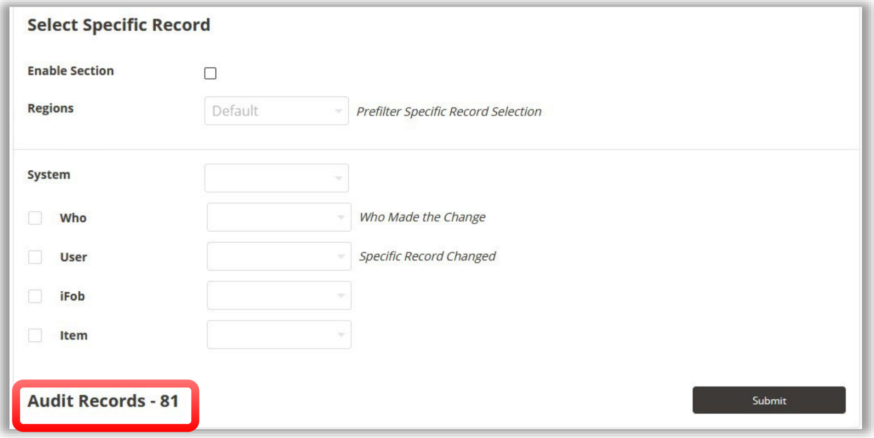


Step 3: Select Specific Record

The **Select Specific Record** is an optional step. It can be enabled by selecting the **Enable Section** checkbox as shown below. With the option enabled, you may then select a specific region.

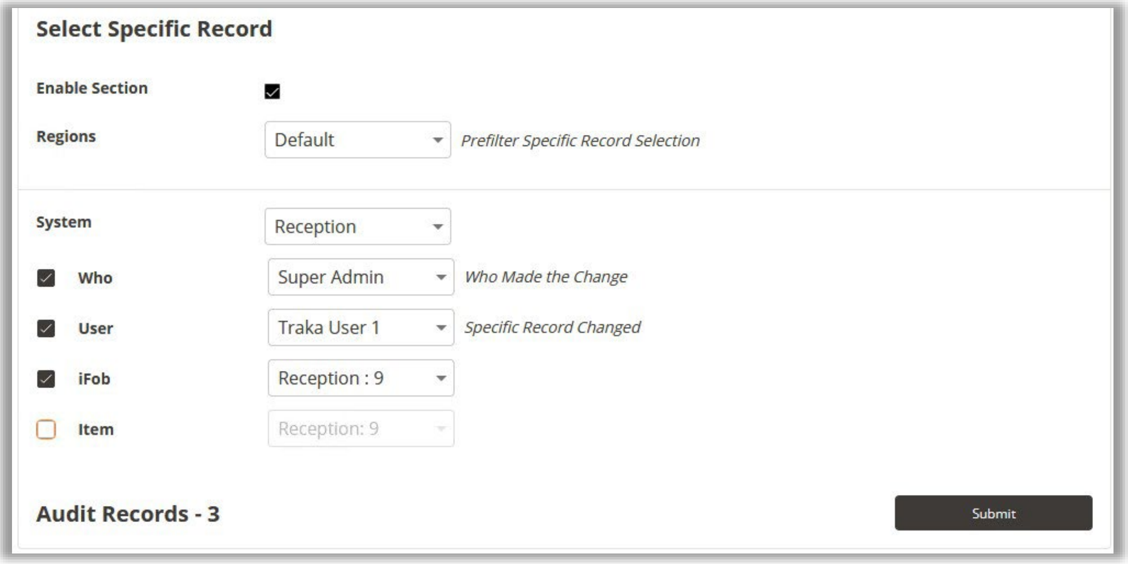


NOTE: If the checkbox is not selected, activity records will still be generated for the options selected in Step 2 as shown in the example below.



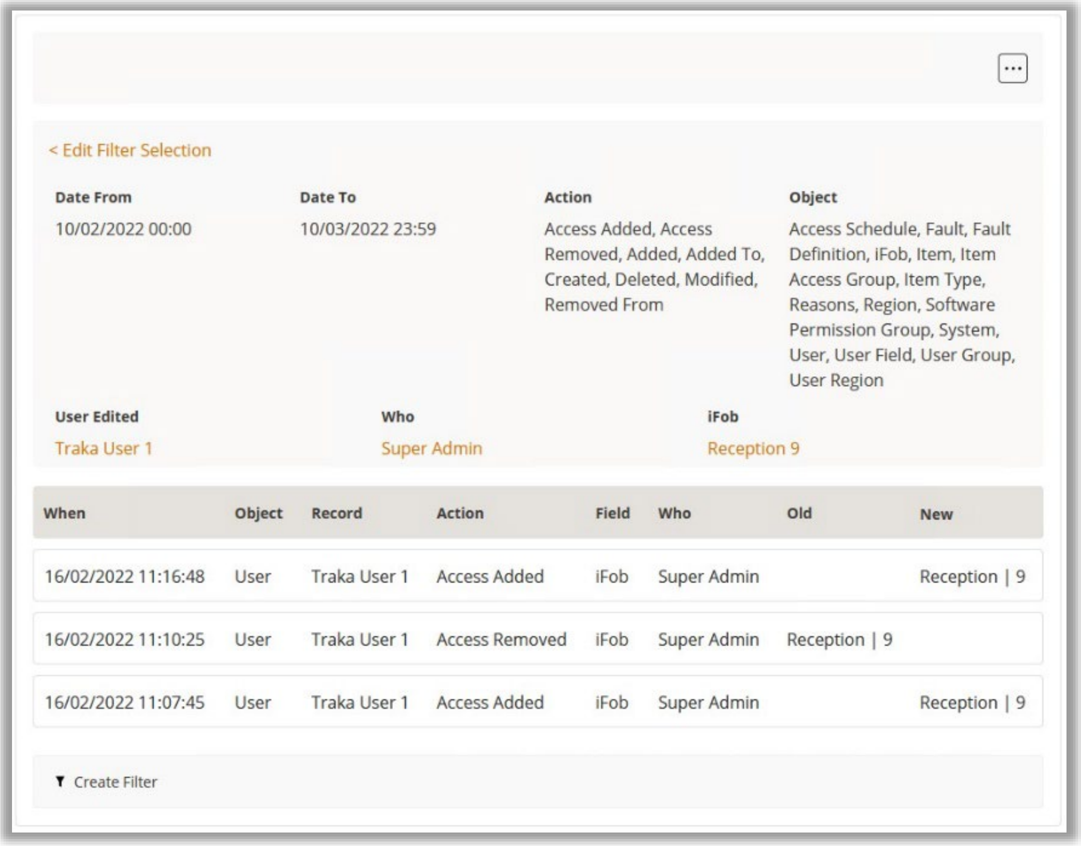
With the **Enable Section** checkbox selected, you will also be able to choose a system from the selected region, a User who made the change, a user specific record change, an iFob, and an Item as required by following the steps below.

1. From the **System** drop-down menu, select a system.
2. Select the **Who** checkbox to select a user who made the change.
3. Select the **User** checkbox to choose a user from the User drop-down menu.
4. Select the **iFob** checkbox to choose an iFob from the iFob drop-down menu.
5. Select the **Item** checkbox to choose an item from the Item drop-down menu.

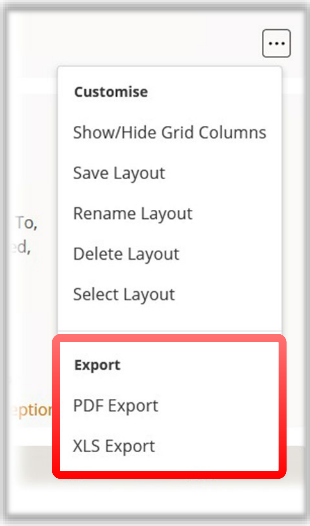


Once you have finished making your selections, click on the **Submit** button.

The final report will provide a summary of the options that were selected and the overall report for those options.



Selecting the Ellipsis button will allow you to export the Activity Report to an XLS or PDF file as required.



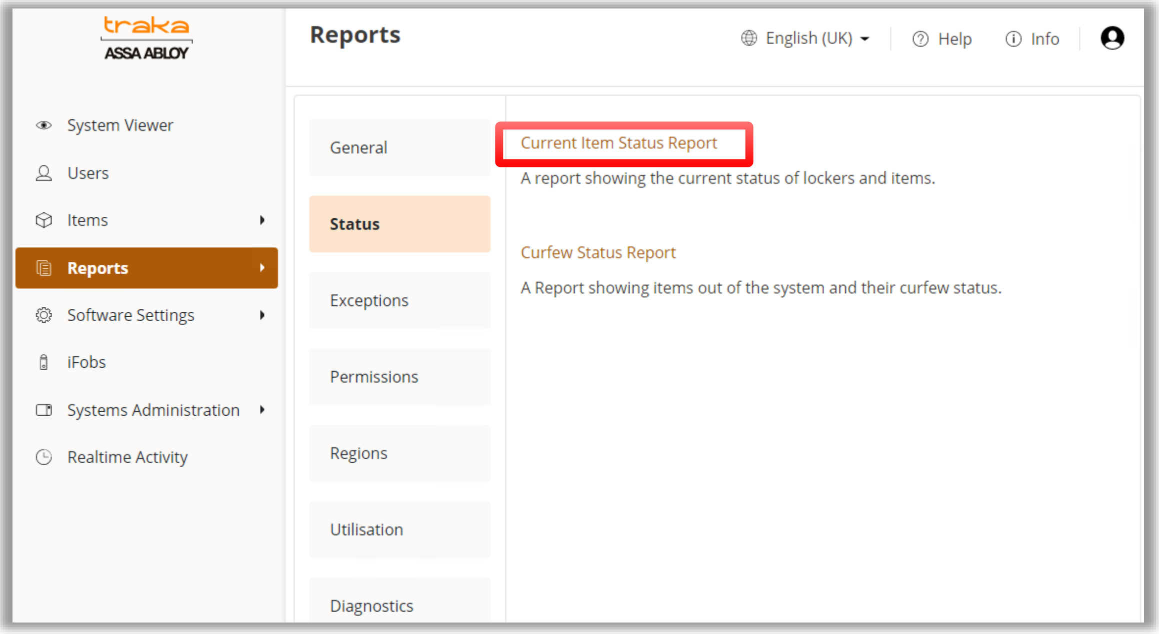
5.7.5 STATUS REPORTS

The Status Report shows all items and their system status, e.g., whether an item is in the system. The Status Report comprises of 2 report categories:

- Current Item Status Report
- Curfew Status Report

Current Item Status Report

1. Click the **Reports** tab on the Navigation Menu.
2. Select the **View Reports** tab followed by the **Status** tab.
3. To view the Current Item Status Report, click on the link.

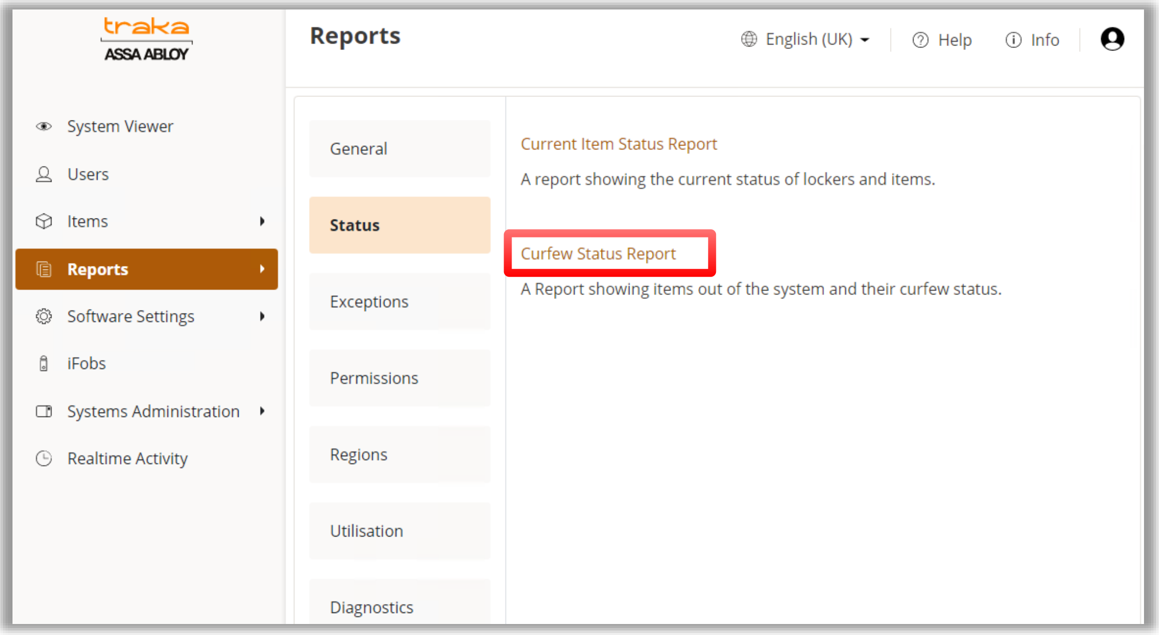


The report will automatically generate. You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

Curfew Status Report

This report shows all items that are out of the system and the curfews set against them.

1. Click the **Reports** tab on the Navigation Menu.
2. Select the **View Reports** tab followed by the **Status** tab.
3. To view the Curfew Status Report, click on the link.



The report will automatically generate.

You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

5.7.6 EXCEPTION REPORTS

The Exception Reports comprises of 5 different report categories:

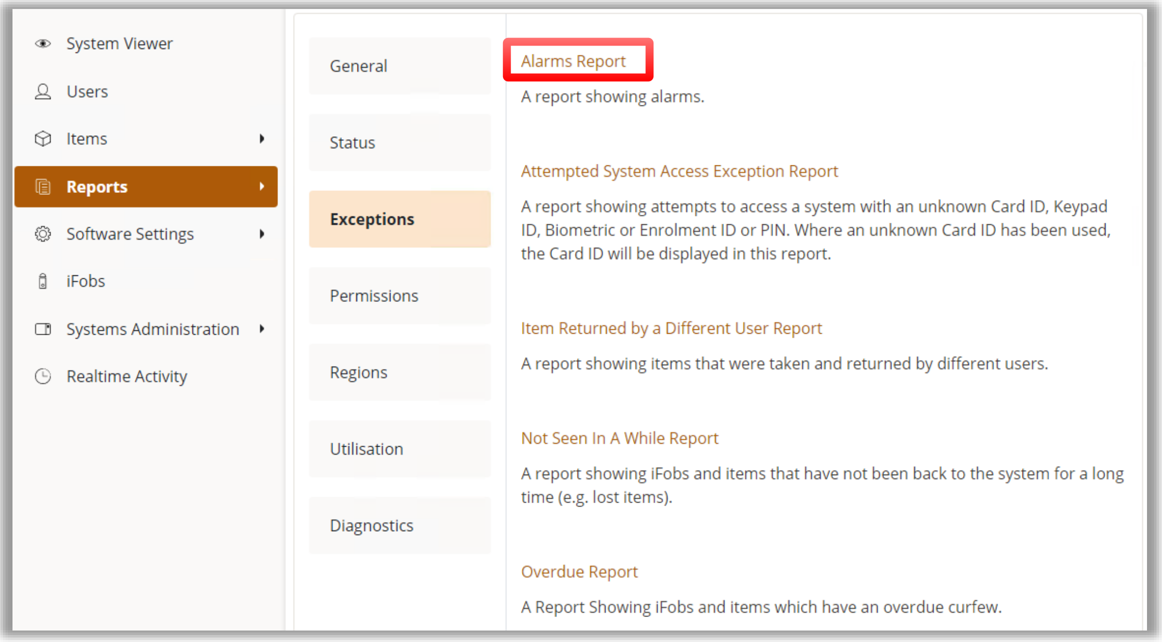
- Alarms Report
- Attempted System Access Exception Report
- Item Returned by a Different User Report
- Not Seen In A While Report
- Overdue Report

NOTE: If any optional features have been enabled, an extra report named 'Data Entry Exception Report' may also be available.

Alarms Report

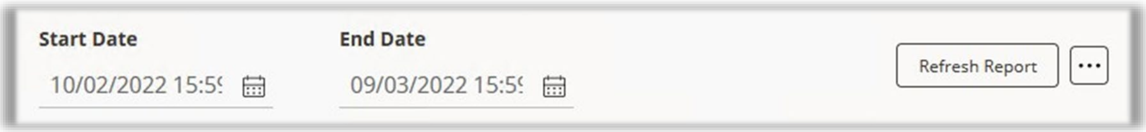
This report shows any alarms that have been triggered.

1. Click the **Reports** tab in the Navigation Menu.
2. Select the **View Reports** tab followed by the **Exceptions** tab.
3. To view the Alarms Report, click on the link.



You will be presented with the event report page. From here, you can select the time frame you wish the report to gather information from. Selecting the start or end date will allow you to input the specific days and times for the report. See Reports Overview for further details.

After selecting the date and time, the **Refresh Report** button will update the report.

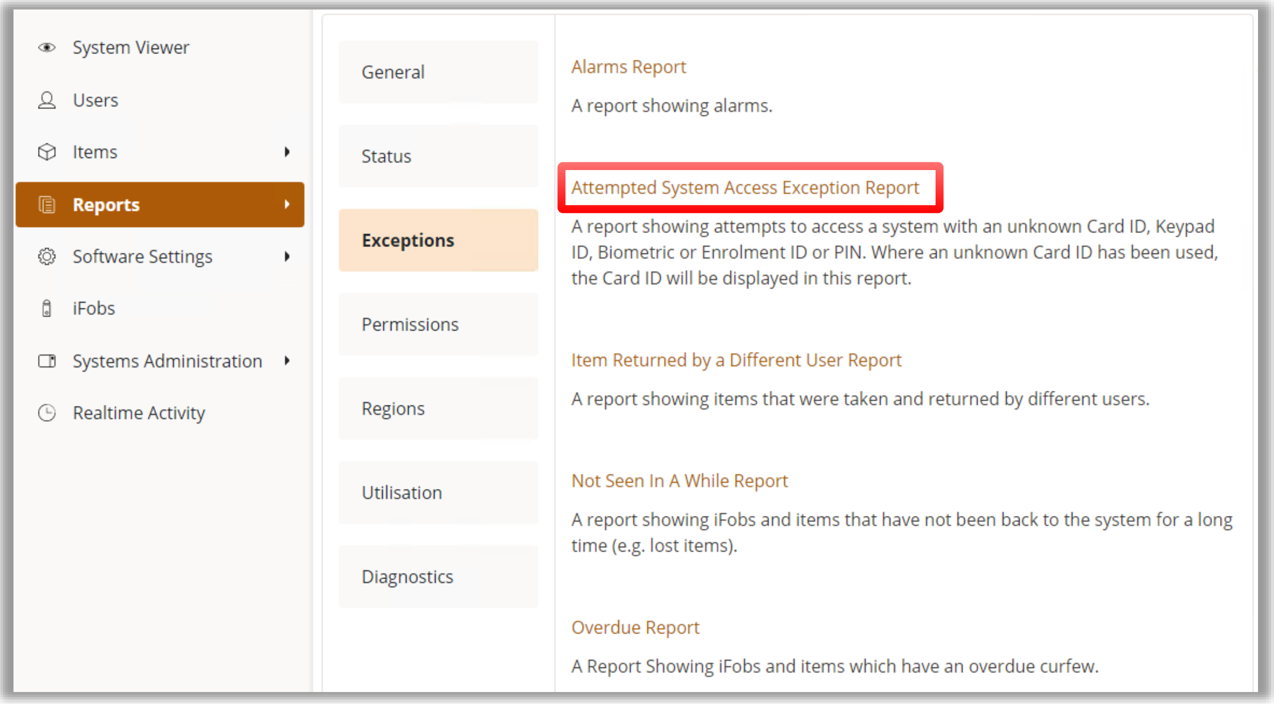


You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

Attempted System Access Exception Report

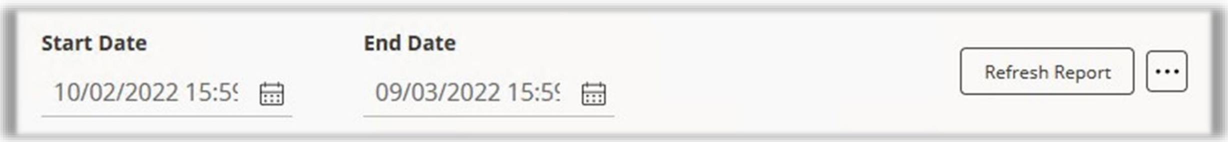
This report shows any attempts to access a system using an unknown Credential ID, Biometric, Enrolment ID or PIN.

1. Click the **Reports** tab on the Navigation Menu.
2. Select the **View Reports** tab followed by the **Exceptions** tab.
3. To view the Attempted System Access Exception Report, click on the link.



You will be presented with the event report page. From here, you can select the time frame you wish the report to gather information from. Selecting the start or end date will allow you to input the specific days and times for the report. See Reports Overview for further details.

After selecting the date and time, the **Refresh Report** button will update the report.

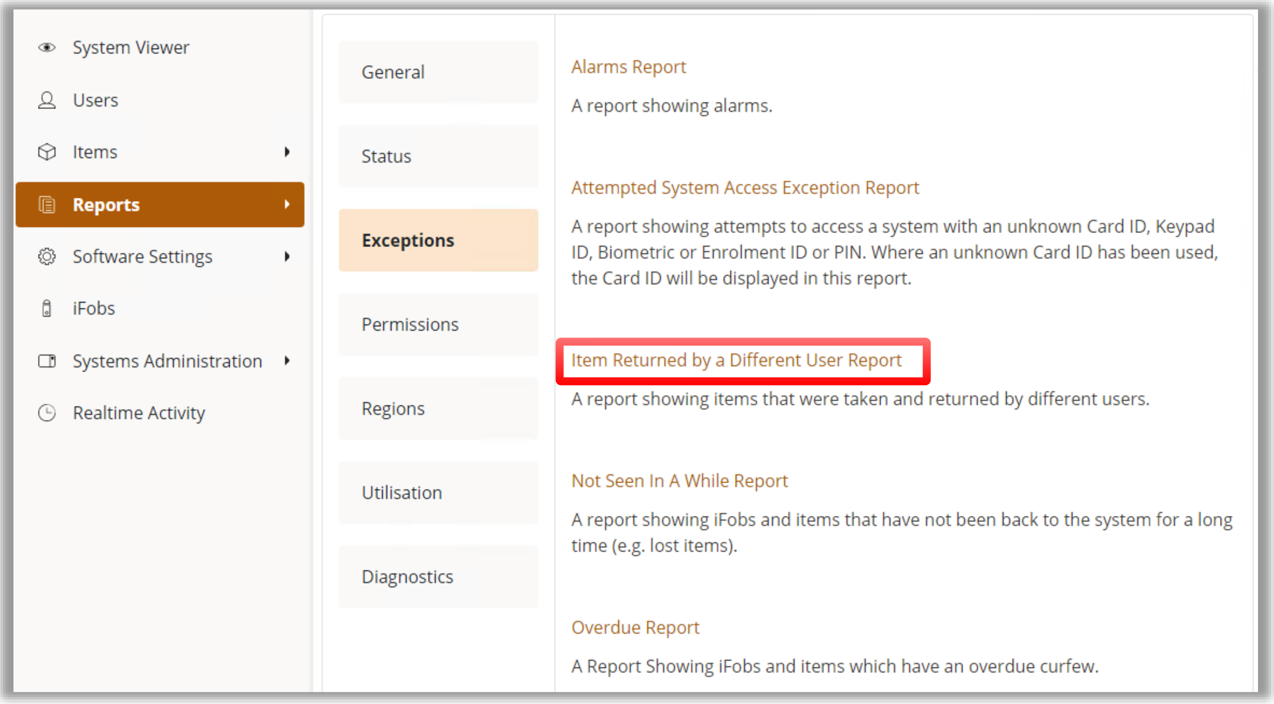


You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

Item Returned by a Different User Report

This report shows any items that were removed from the system and then later returned by a different user.

1. Click the **Reports** tab on the Navigation Menu.
2. Select the **View Reports** tab followed by the **Exceptions** tab.
3. To view the Item Returned by a Different User Report, click on the link.



You will be presented with the event report page. From here, you can select the time frame you wish the report to gather information from. Selecting the start or end date will allow you to input the specific days and times for the report. See Reports Overview for further details.

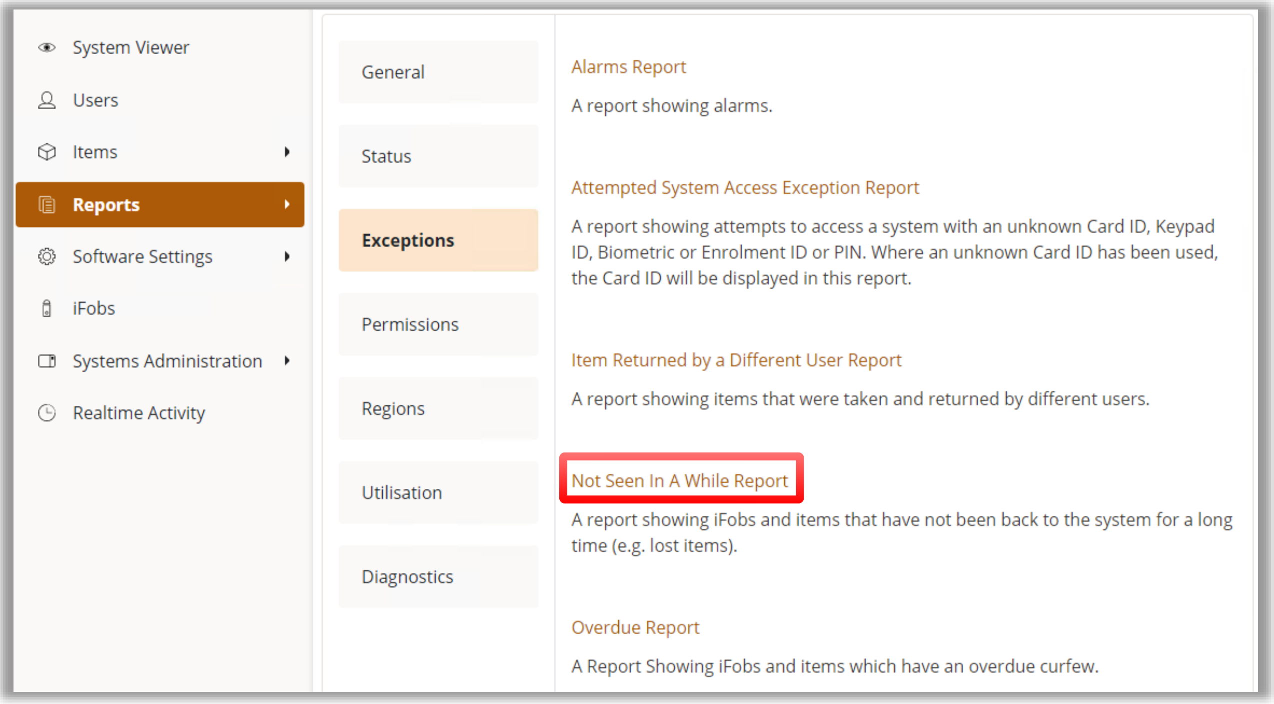
After selecting the date and time, the **Refresh Report** button will update the report.

You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

Not Seen In A While Report

This report shows all items and iFobs that have been absent from the system for a long period of time.

1. Click the **Reports** tab on the Navigation Menu.
2. Select the **View Reports** tab followed by the **Exceptions** tab.
3. To view the Not Seen in a While Report, click on the link.



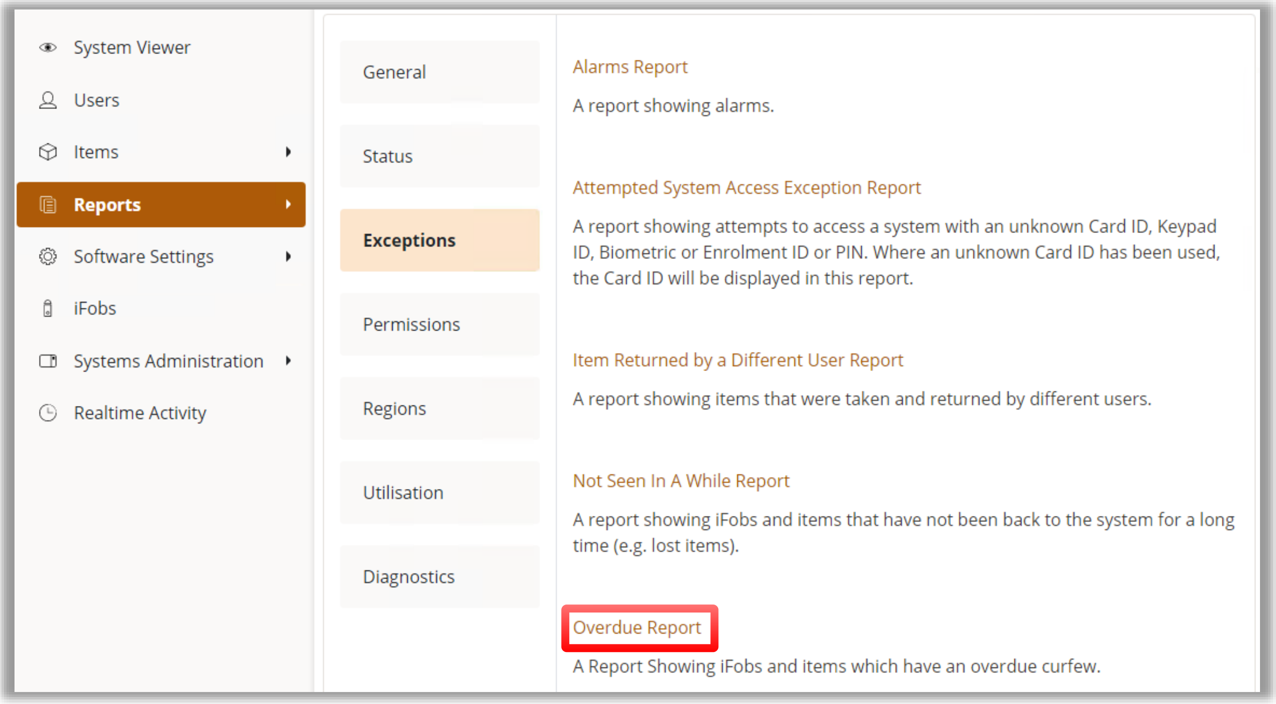
The report will automatically generate. The default duration is set to 30 days but can be adjusted by selecting the chevrons on the Toolbar.

You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

Overdue Report

This report shows all items in the system that have an overdue curfew.

1. Click the **Reports** tab on the Navigation Menu.
2. Select the **View Reports** tab followed by the **Exceptions** tab.
3. To view the Overdue Report, click on the link.



The report will automatically generate.

You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

5.7.7 PERMISSIONS REPORTS

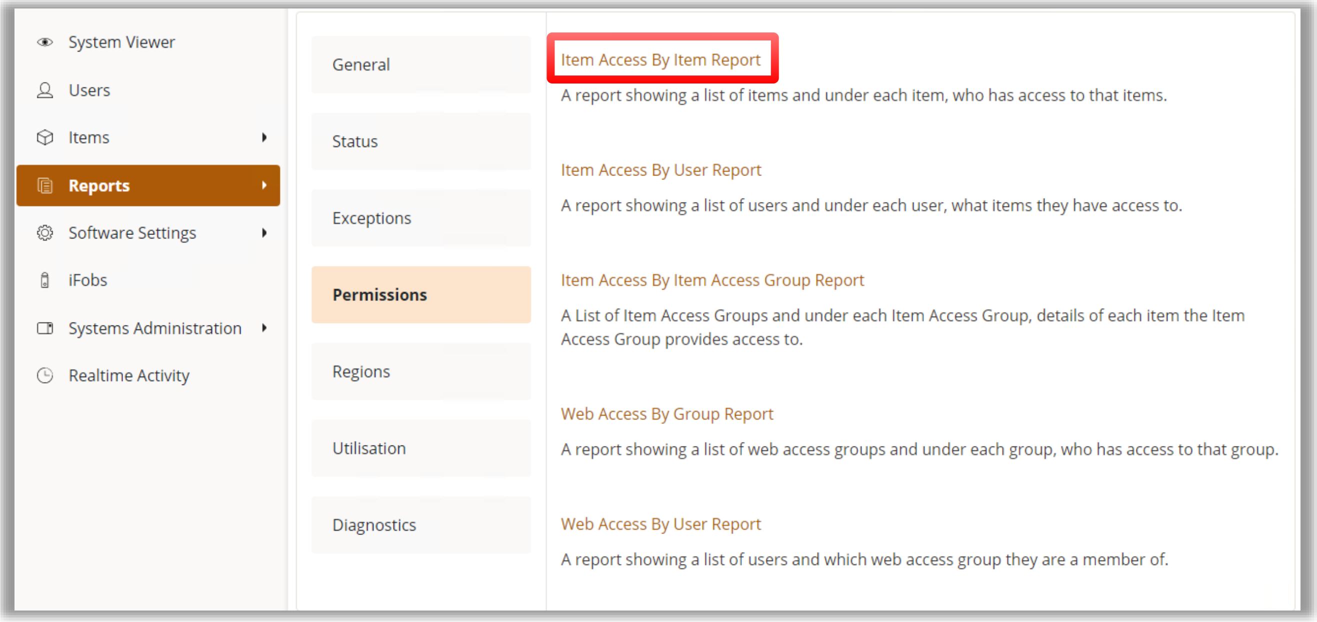
The Permissions Report comprises of 4 report categories:

- Item Access by Item Report
- Item Access by User Report
- Web Access by Group Report
- Web Access by User Report

Item Access By Item Report

This report shows a list of items and under each item is the user who has access to it.

1. Click the **Reports** tab in the Navigation Menu.
2. Select the **View Reports** tab followed by the **Permissions** tab.
3. To view the Item Access By Item Report, click on the link.



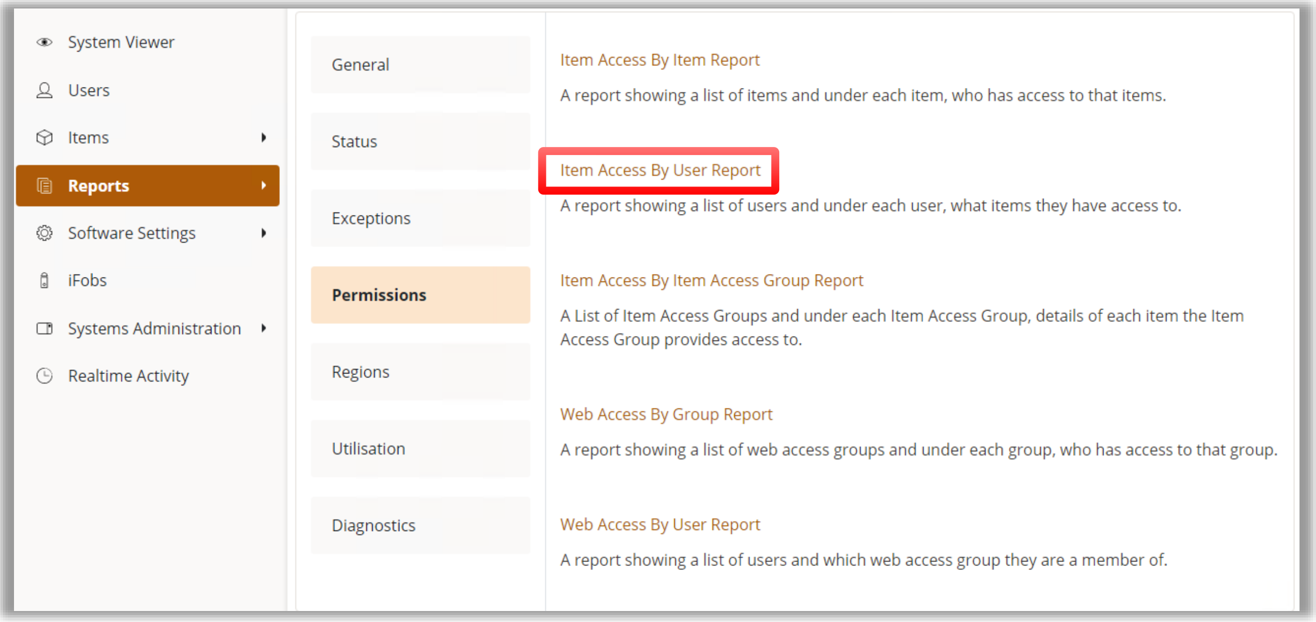
The report will automatically generate.

You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

Item Access By User Report

This report shows a list of users and under each user is what items they have been granted access.

1. Click the **Reports** tab in the Navigation Menu.
2. Select the **View Reports** tab followed by the **Permissions** tab.
3. To view the Item Access By User Report, click on the link.



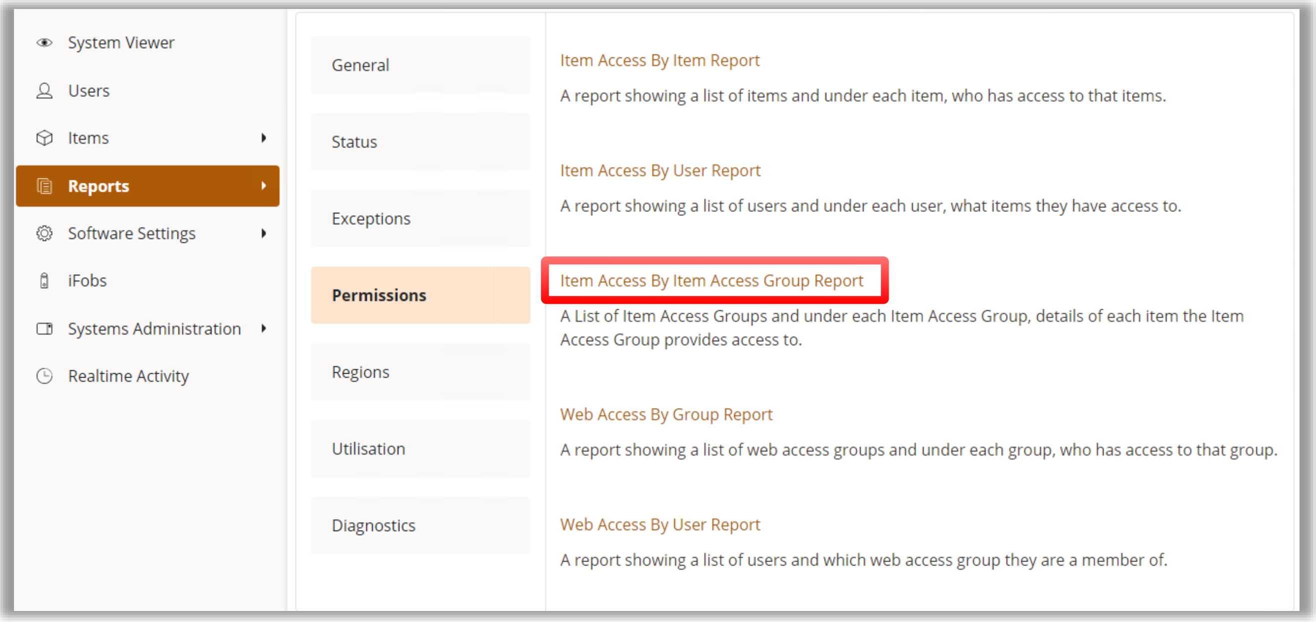
The report will automatically generate.

You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

Item Access By Item Access Group Report

This report shows a list of item access groups and the items which have access to them.

1. Click the **Reports** tab in the Navigation Menu.
2. Select the **View Reports** tab followed by the **Permissions** tab.
3. To view the Item Access By Item Access Group Report, click on the link.



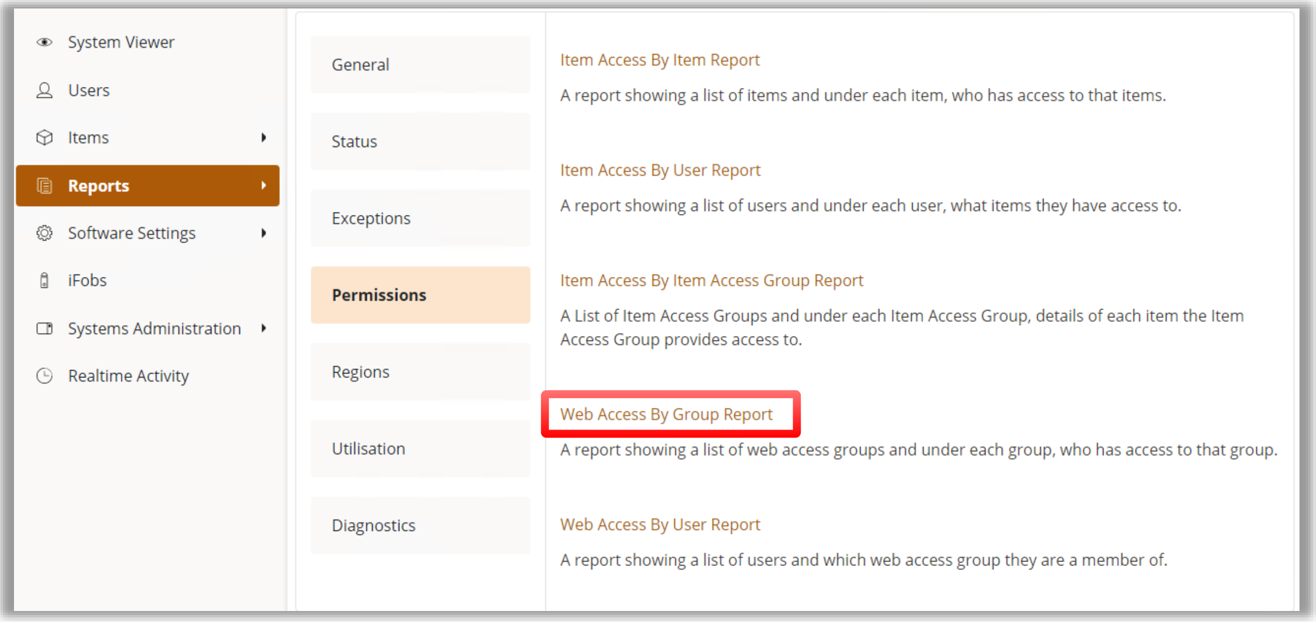
The report will automatically generate.

You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

Web Access By Group Report

This report shows a list of web access groups and the users who have access to them.

4. Click the **Reports** tab in the Navigation Menu.
5. Select the **View Reports** tab followed by the **Permissions** tab.
6. To view the Web Access By Group Report, click on the link.



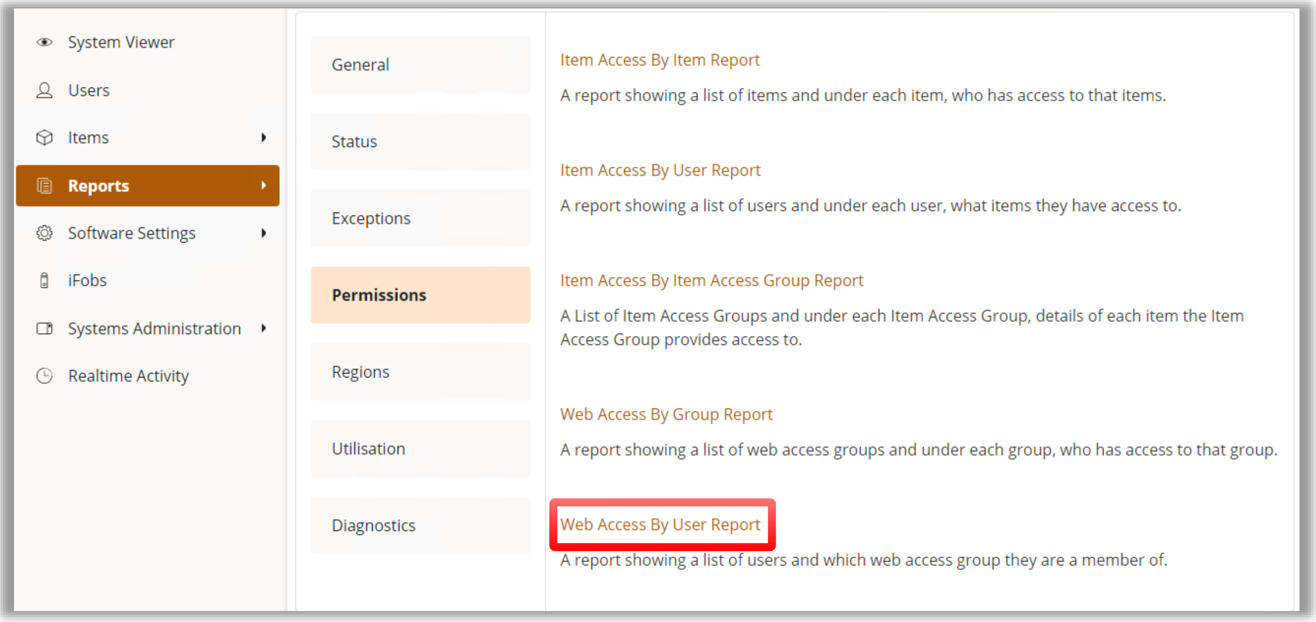
The report will automatically generate.

You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

Web Access by User Report

This report shows a list of web access groups and the users who are in those groups.

1. Click the **Reports** tab in the Navigation Menu.
2. Select the **View Reports** tab followed by the **Permissions** tab.
3. To view the Web Access by User Report, click on the link.



The report will automatically generate.

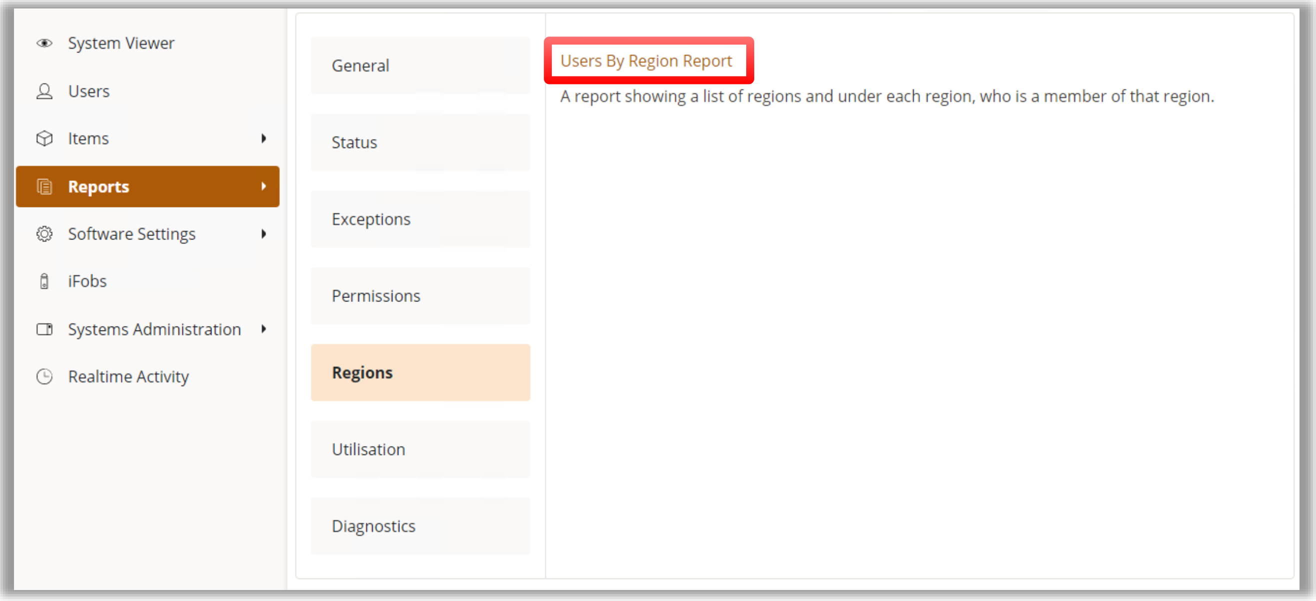
You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

5.7.8 REGION REPORTS

Users By Region Report

This report shows a list of regions and which users have access to each region.

1. Click the **Reports** tab in the Navigation Menu.
2. Select the **View Reports** tab followed by the **Regions** tab.
3. To view the Users by Region Report, click on the link.



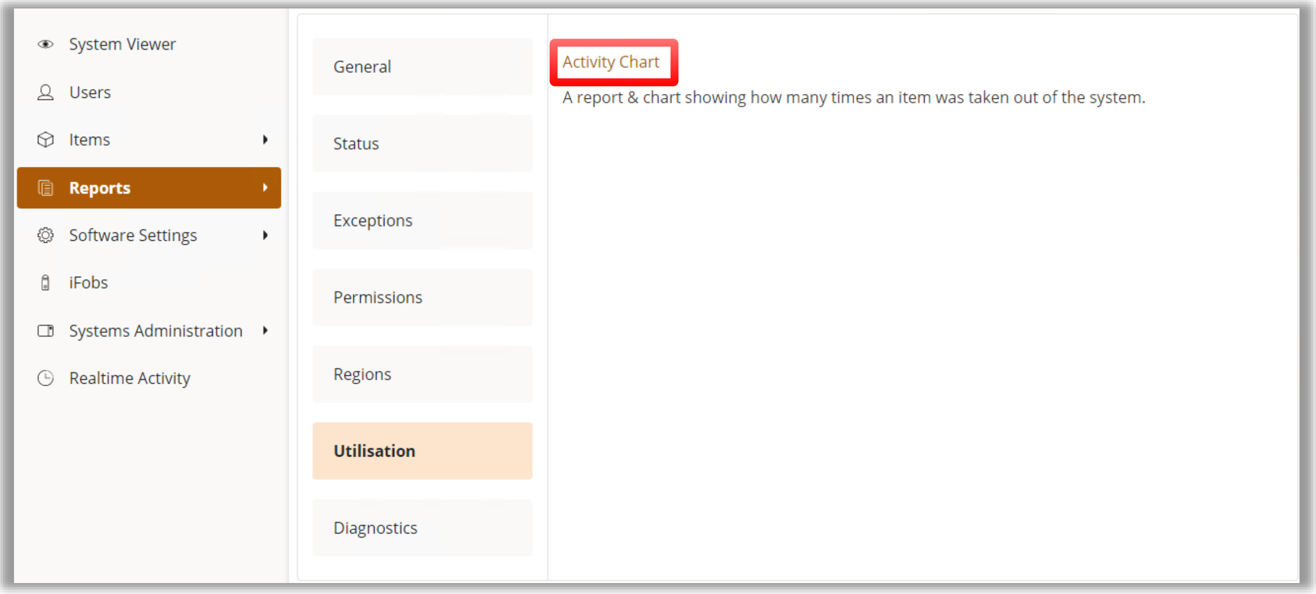
The report will automatically generate.

You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

Activity Chart

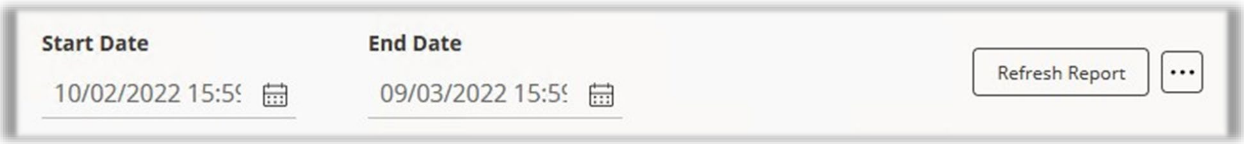
This report/chart shows how many times an item has been removed from the system.

1. Click the **Reports** tab on the Navigation Menu.
2. Select the **View Reports** tab followed by the **Utilisation** tab.
3. To view the Activity Chart, click on the link.



You will be presented with the event report page. From here, you can select the time frame you wish the report to gather information from. Selecting the start or end date will allow you to input the specific days and times for the report. See Reports Overview for further details.

After selecting the date and time, the **Refresh Report** button will update the report.



You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

5.7.10 DIAGNOSTICS REPORTS

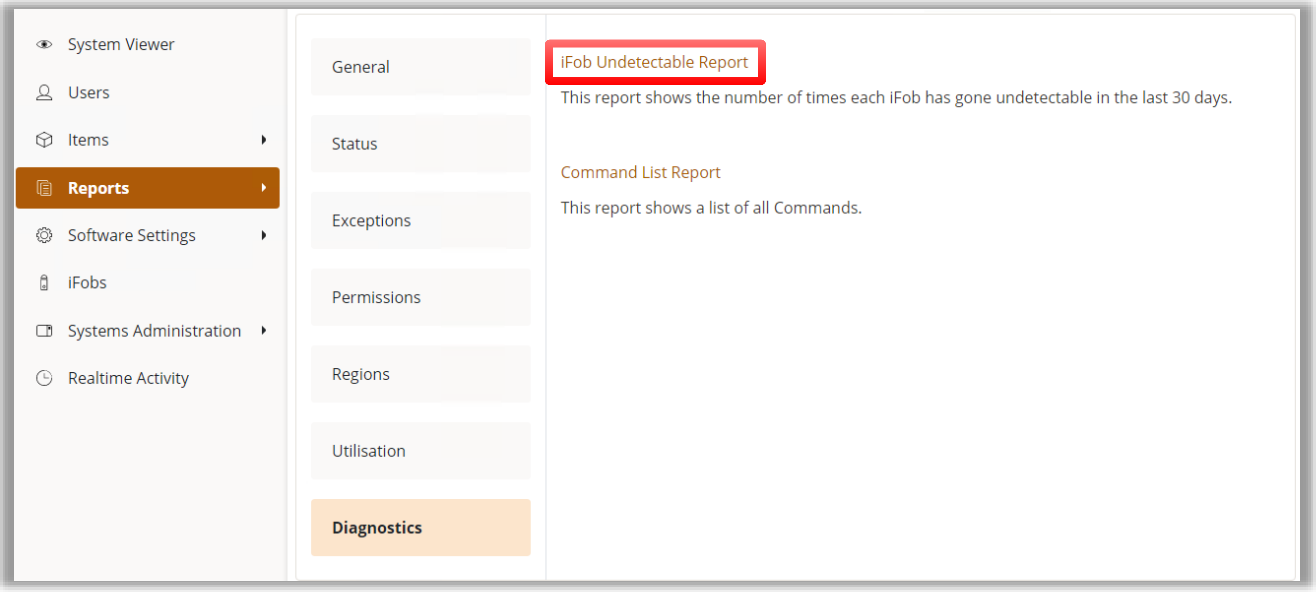
The Diagnostics Report comprises of 2 report categories:

- iFob Undetectable Report
- Command List Report

iFob Undetectable Report

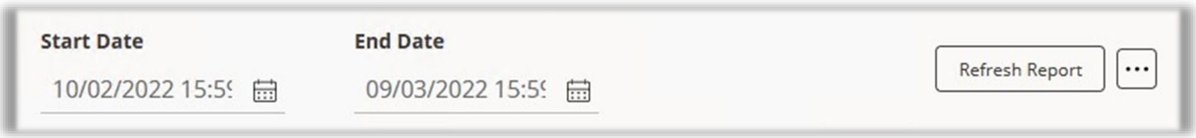
This report shows the number of times each iFob/item has gone undetectable in the last 30 days.

1. Click the **Reports** tab on the Navigation Menu.
2. Select the **View Reports** tab followed by the **Diagnostics** tab.
3. To view the iFob Undetectable Report, click on the link.



You will be presented with the report page. From here, you can select the time frame you wish the report to gather information from. Selecting the start or end date will allow you to input the specific days and times for the report. See Reports Overview for further details.

After selecting the date and time, the **Refresh Report** button will update the report.



You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

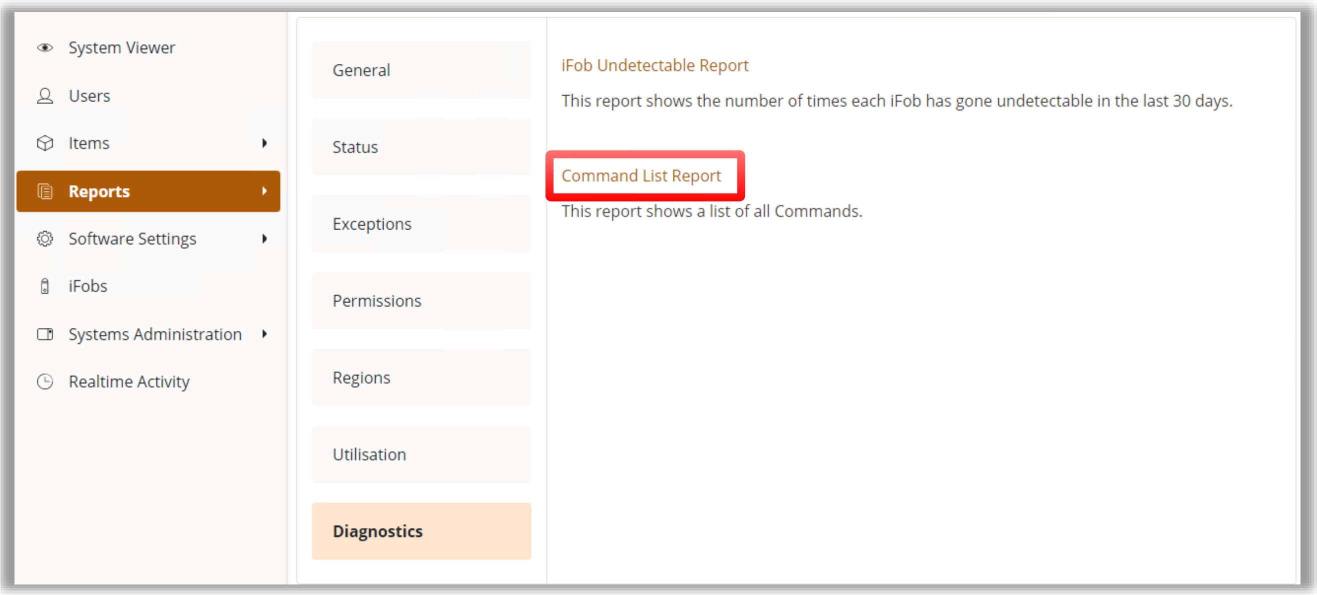
Command List Report

This report shows how many times an item has been removed from the system.

1. Click the **Reports** tab on the Navigation Menu.

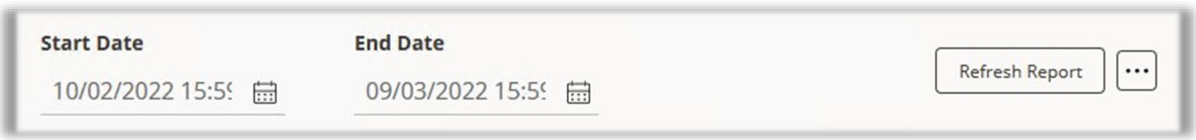
2. Select the **View Reports** tab followed by the **Diagnostics** tab.

3. To view the iFob Command List Report, click on the link.



You will be presented with the report page. From here, you can select the time frame you wish the report to gather information from. Selecting the start or end date will allow you to input the specific days and times for the report. See Reports Overview for further details.

After selecting the date and time, the **Refresh Report** button will update the report.



You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

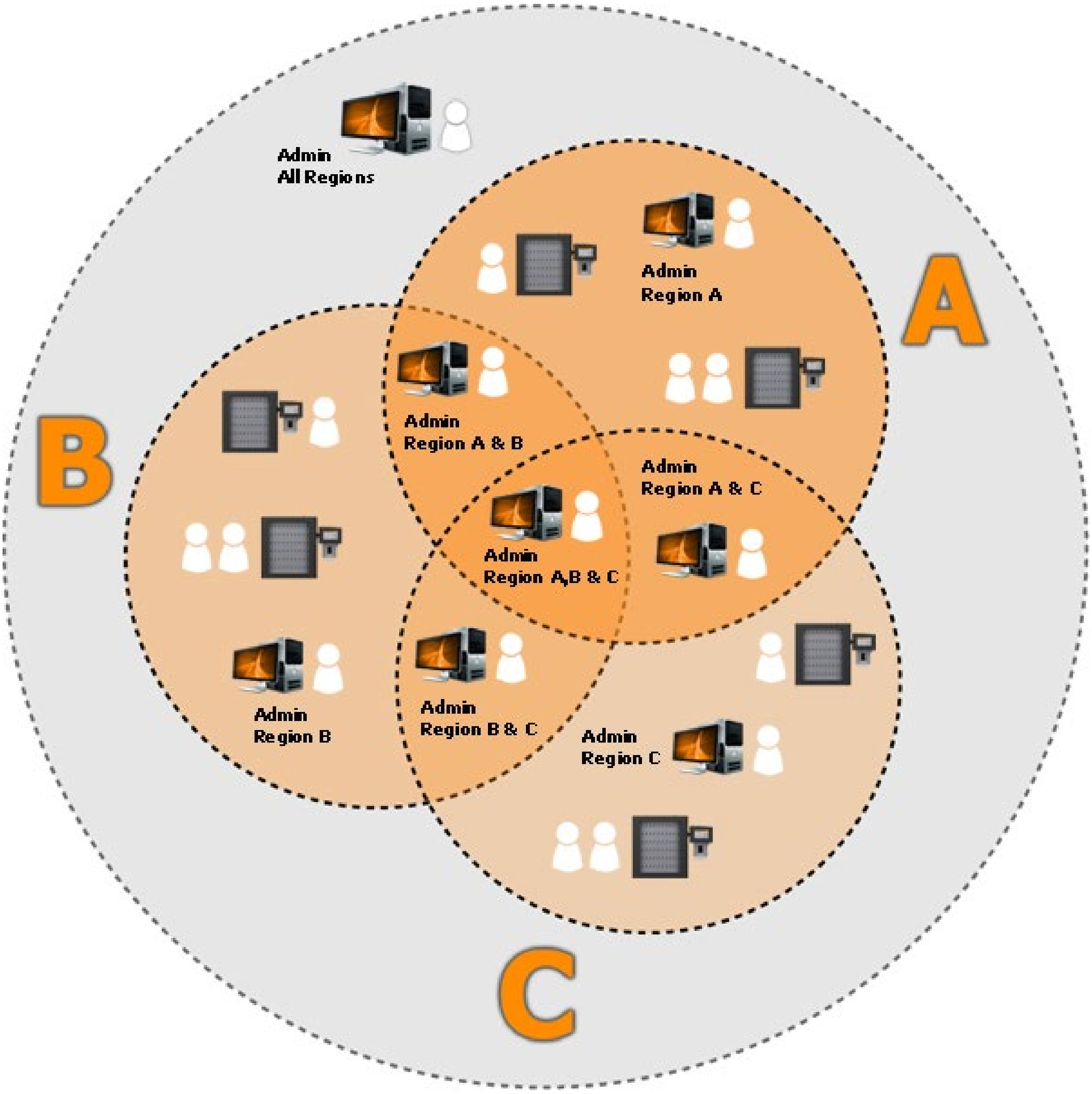
5.8 SOFTWARE SETTINGS

5.8.1 REGIONS

5.8.1.1 REGIONS OVERVIEW

Regions allow for TrakaWEB users to only access or edit the information on Systems, iFobs, Items and Users within their specified region(s). Multiple Regions provide much increased flexibility for customers with more complex web and system access requirements. An example of where Multiple Regions may be necessary, is where an organisation has many Traka systems spread geographically and each region has one or more TrakaWEB Admin users that are only responsible for maintaining their own region(s). In addition, some organisations may choose to regionalise by department e.g. Sales, Finance, Engineering, where each department has a TrakaWEB Administrator who can only see Traka Systems and Users within their department(s).

Below is a graphic representation of how Multiple Regions could be defined.



5.8.2 REGION VISIBILITY RULES

There are various 'Region Rules' that may be used to describe the behaviour of data visibility and data manipulation within TrakaWEB.

These rules are important due to the way in which Administrators and Data entities such as Item Access Groups may belong to more than one region. Therefore, the rules have been defined to help describe which users can see what.

So, for example, a user such as an Administrator logging into TrakaWEB must only be able to see Data that relates to the region(s) that they are a member of.

NOTE: It is worth taking into consideration that a System can only belong to a single Region but an Administrator, User, or Item Access Group etc. can belong to one or multiple Regions.

The rule descriptions are as follows:

- Wholly Contained Regions
- Partially Contained Regions
- Multiple Levels of Filtering
- Visible Regardless of Filtering

Wholly Contained Regions:

The 'Wholly Contained Regions' rule describes Data that will only be visible to the Administrator that is logged in, when both the Administrator and the Data Entities meet the following parameters:

- They are members of the same Region but at the same time
- They are **NOT** members of other regions that are outside the scope of the logged in Administrators Regions

This will allow an Administrator who is logged in to have overall control of data and prevent anyone else that is not a member of the same region set from changing it.

The table below is an example of TrakaWEB already setup with 3 Regions. The Regions are named A, B and C. 'All Regions' refers to A, B and C collectively.

Administrator	Data Entity				
	All Regions (meaning A, B & C)	Region A	Region B	Region A & B	Region A, B & C
All Regions (meaning A, B & C)	Granted	Granted	Granted	Granted	Granted
Region A	Denied	Granted	Denied	Denied	Denied
Region B	Denied	Denied	Granted	Denied	Denied
Region A & B	Denied	Granted	Granted	Granted	Denied
Region A, B & C	Granted	Granted	Granted	Granted	Granted

Partially Contained Regions:

The 'Partially Contained Regions' rule describes Data that will only be visible to an Administrator that is logged in when both the Administrator and Data Entities meet the following parameters:

- They are members of the same Region but at the same time

- They are **ALSO** members of other Regions that are outside the scope of the logged in Administrators Regions

This will allow an Administrator who is logged in to have the ability to only allow them to edit their portion of particular regional Data. They will be unable to edit Data outside of their region set. Under the 'Partially Contained Regions' rule, common Data spanning multiple Regions will not be editable but may still be editable under the 'Wholly Contained Regions' rule.

The table below is an example of TrakaWEB already setup with 3 Regions. The Regions are named A, B and C. 'All Regions' refers to A, B and C collectively.

Administrator	Data Entity				
	All Regions (meaning A, B & C)	Region A	Region B	Region A & B	Region A, B & C
All Regions (meaning A, B & C)	Granted	Granted	Granted	Granted	Granted
Region A	Granted (Region A Portion)	Granted	Denied	Granted (Region A Portion)	Granted (Region A Portion)
Region B	Granted (Region B Portion)	Denied	Granted	Granted (Region B Portion)	Granted (Region B Portion)
Region A & B	Granted (Region A & B Portion)	Granted	Granted	Granted	Granted (Region A & B Portion)
Region A, B & C	Granted	Granted	Granted	Granted	Granted

Multiple Levels of Filtering:

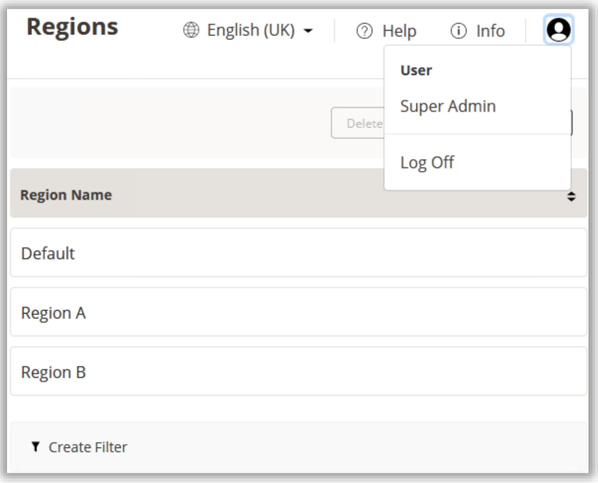
Whilst considering regional visibility within TrakaWEB, there are 2 levels of filtering that can be applied to certain features or areas of the software that meet the following conditions:

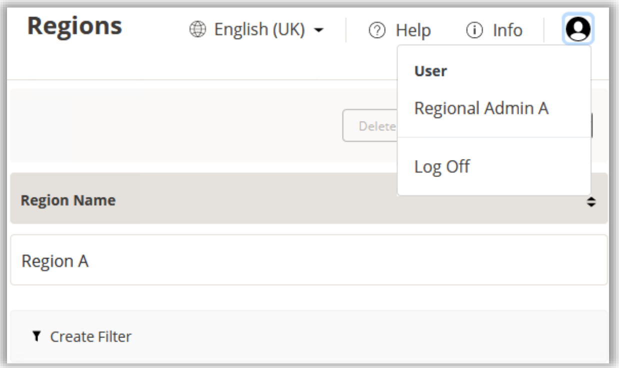
- The regional visibility of the logged in Administrator
- The selected regional visibility of the Data being edited

Consider the following example:

- There exist three Regions: Default, Region A, and Region B
- There are two Administrator Users: one Super Admin who belongs to all Regions, and one Regional Admin A who only belongs to Region A

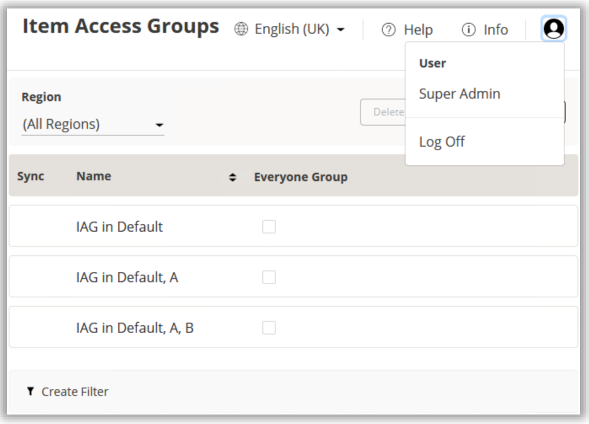
Super Admin can see all three existing Regions, but Regional Admin A can only see Region A:

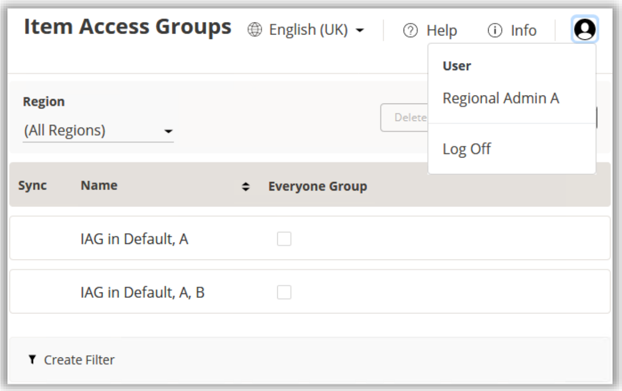




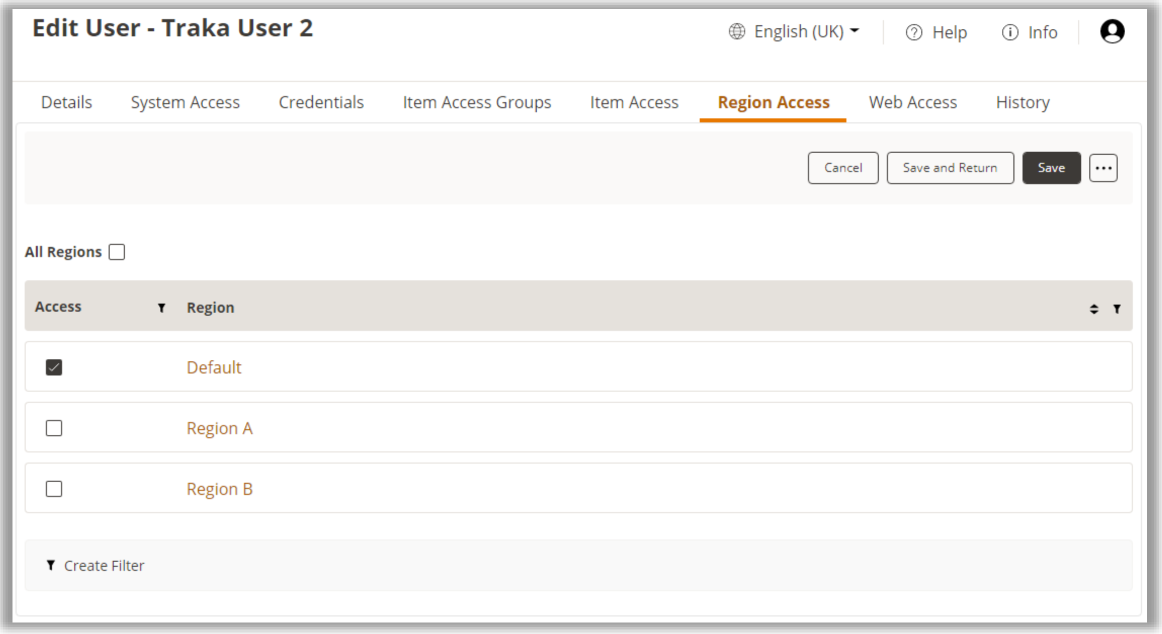
- Next, there are 3 Item Access Groups in existence: “IAG in Default” which belongs to the Default Region; “IAG in Default, A” which belongs to the Regions: Default and Region A; and “IAG in Default, A, B” which belongs to the Regions: Default, Region A, and Region B

Super Admin can see all three Item Access Groups, but Regional Admin A can only see “IAG in Default, A” and “IAG in Default, A, B” as these are the only Item Access Groups which belong to the same region as Regional Admin A (in accordance with the ‘Partially Contained Regions’ rule):

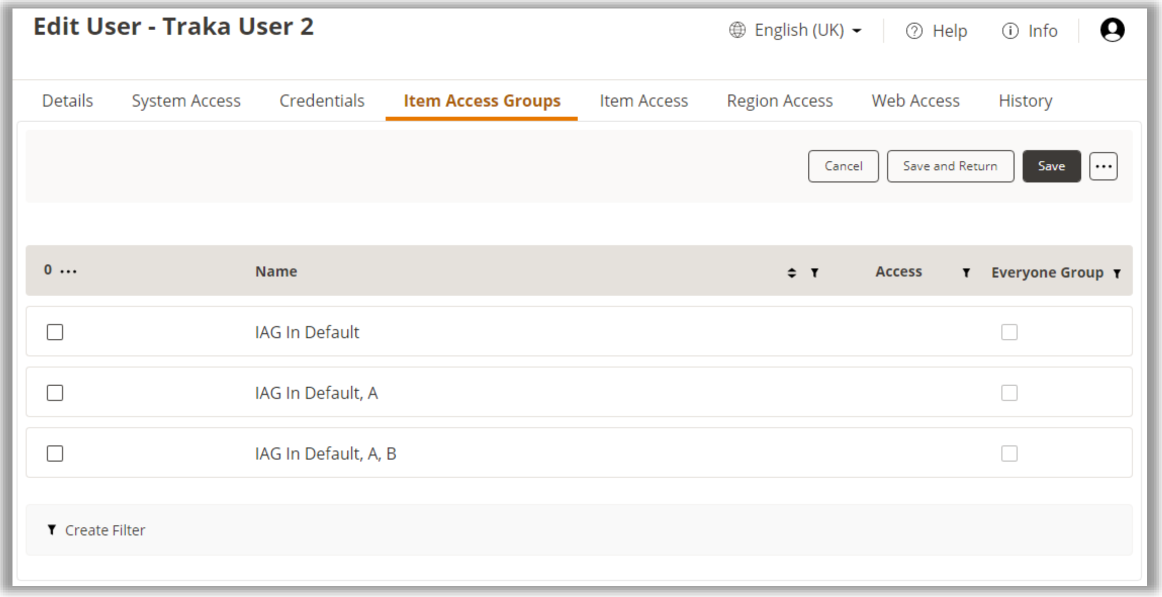




In such case, only Super Admin can assign Users to any and all Regions, as only they have access to all of them. In the **Regions** tab in the **Edit User** menu, Super Admin chooses to assign the User to the Default Region:



When Super Admin moves to the **Item Access Group** tab in the Edit User menu, they can only assign the User to one Item Access Group: "IAG in Default". Two other Item Access Groups are greyed out. This is the direct result of Multiple Levels of Filtering. The visible Item Access Groups are limited to the members of the Default Region – under the 'Partially Contained Regions' rule, but the Item Access Groups that can be selected are limited to the ones which are members of the Default Region only – the 'Wholly Contained Regions' rule. This is shown below:



<u>Visible Regardless of Regions:</u>

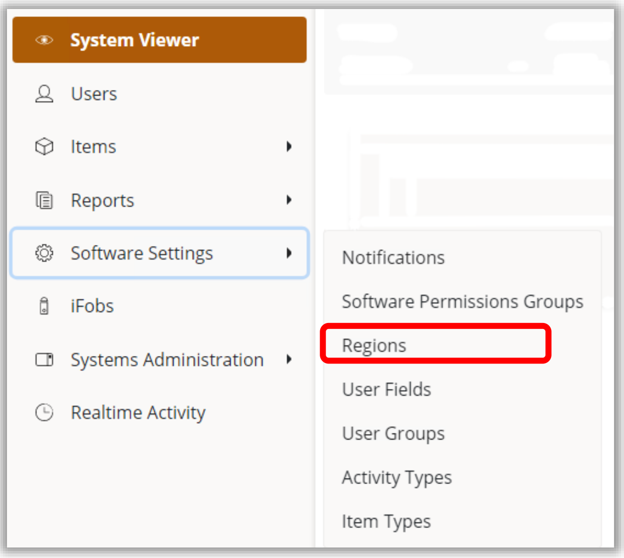
For the 'Visible Regardless of Regions' rule, some features of TrakaWEB software will be accessible to all Administrators irrespective of Region visibility such as:

- Item Types
- Software Permissions Groups
- Activity Types

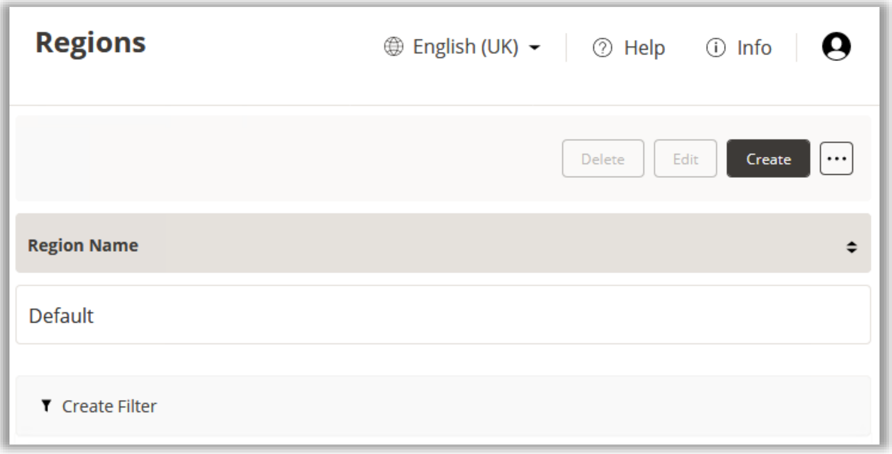
5.8.3 ADDING A NEW REGION

Regions allow TrakaWEB users to see and access only the information from Systems, Items and Users within their specified region(s). Regions are particularly useful when managing many systems spread across a large area.

1. To add a new region, you will need to navigate to the Regions page. Using the Navigation Menu to the left of the page, select Software Settings, and then from the mini menu click Regions.

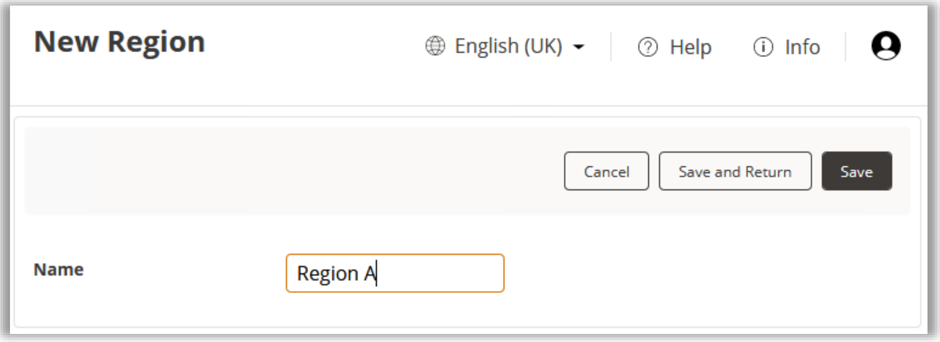


2. This will display the list of all the current regions within your database.



3. Click the **Create** button.

4. You will then be prompted to enter a region name e.g., Region A.



5. Once you have entered a name, you can click the **Save and Return** button.

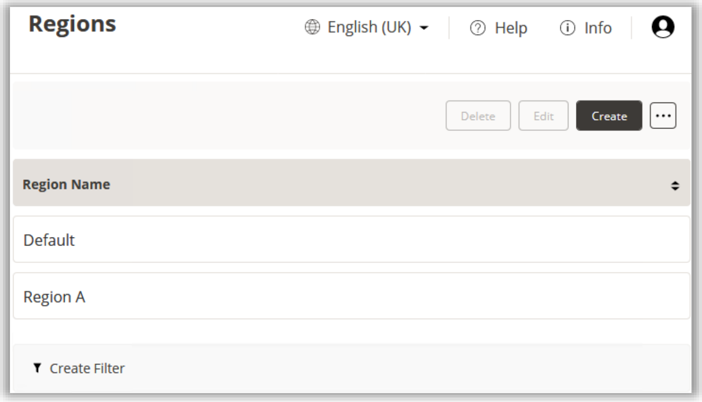
6. You will now be taken back to the region list, which will be populated with the newly added region. To add more regions simply click the Create button and restart the process from step 3.

5.8.4 EDITING A REGION

Editing a region allows you to rename an existing region. To edit a region, you will need to navigate to the Regions page.

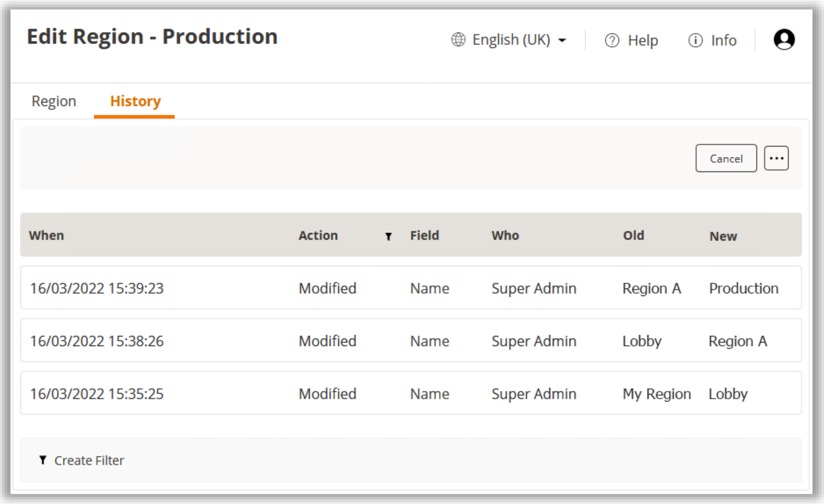
NOTE: Please keep in mind that all the systems, users and groups will stay assigned to the region even after it has been renamed.

1. Using the Navigation Menu to the left of the page, select Software Settings, then from the mini menu click **Regions**. This will display the list of all the current regions within your database.



2. Highlight the region you wish to edit and click on the **Edit** button.
3. You will then be able to rename the region. In the example below the **Region A** has been renamed to **Production**.

4. Click the **Save** button.
5. Select the **History** tab. Your changes will now be automatically saved. You will notice that a full history of changes made to that region is listed here. This clearly shows that the region has been renamed on the 16/03/2022 by Super Admin and in the last modification has changed the Region's name from **Region A** to **Production**.

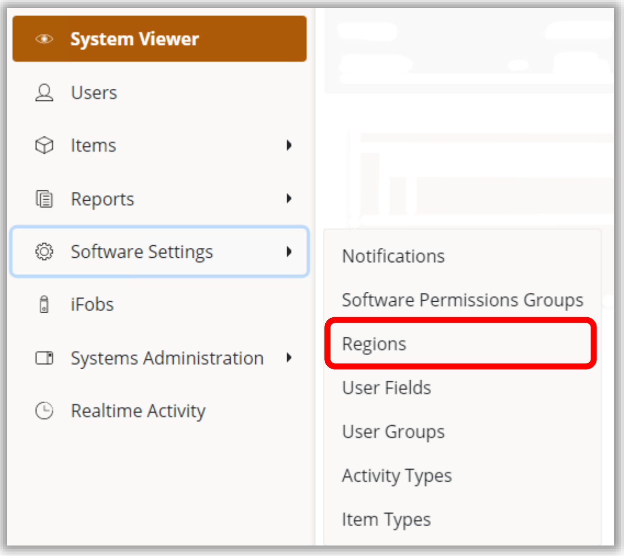


6. From the Navigation Menu, select the Regions again and you will now be taken back to the region list. You will notice that the region you have just renamed has been updated in the list. To rename more regions, simply click the **Edit** button and restart the process from step 2.

5.8.5 DELETING A REGION

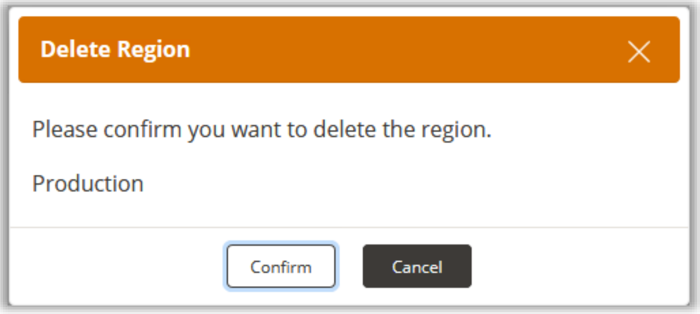
To delete a region, you will need to navigate to the Regions page.

1. Using the Navigation Menu to the left of the page, select Software Settings, then from the mini menu click Regions. This will display the list of all the current regions within your database.



2. Highlight the region you wish to delete and click the **Delete** button.

3. You will then be prompted by a message asking if you wish to permanently delete the region, select Confirm.



4. You will now be taken back to the region list. You will notice that the region you have just deleted is no longer in the list. To delete more regions, simply restart the process from step 2.

5.9 SOFTWARE PERMISSION GROUPS

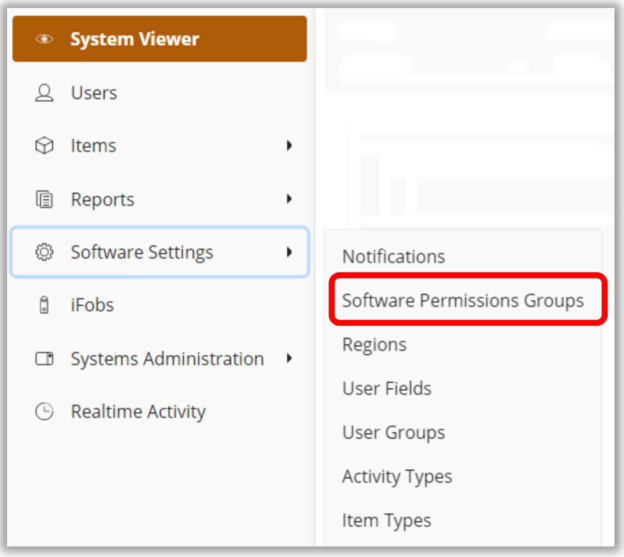
Software Permission Groups define what areas of the software users have access to within TrakaWEB. The default group is the 'Super Admin' group, which has full access to TrakaWEB. However, you may want a user to be able to create and edit another user's details but not be able to delete them. Alternatively, you may want to grant a manager access to the Items and iFobs within their group, but not to the rest of the business. Using the expandable list, you can quickly select what permissions the group does or does not have.

The two subsections below will demonstrate how to create the two examples given.

To assign a software permission group to a user, refer to the Web Access tab in the user record.

5.9.1 CREATING A NEW SOFTWARE PERMISSIONS GROUP

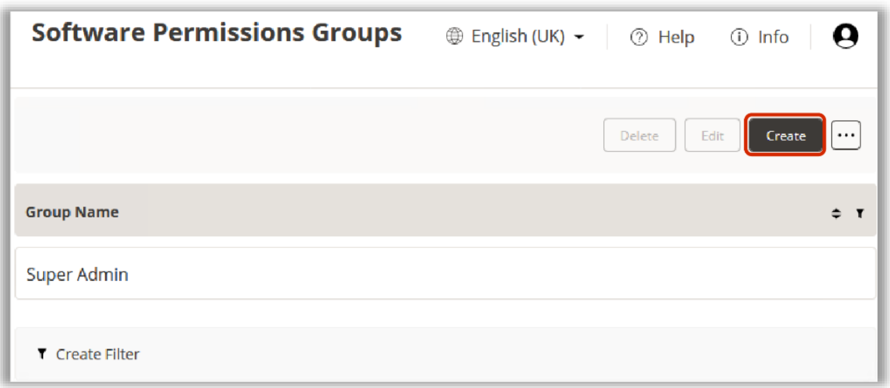
1. In the Navigation Menu to the left of the page, click on Software Settings, then select **Software Permissions Groups**.



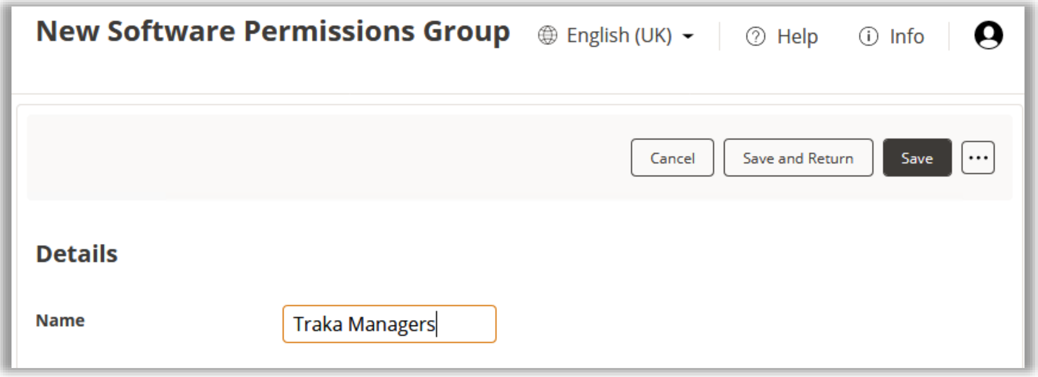
2. You will now be taken to the Software Permissions Groups landing page. The only Group initially present will be 'Super Admin'.

NOTE: By default, the 'Super Admin' group will have access to all permissions, which cannot be edited by another Group.

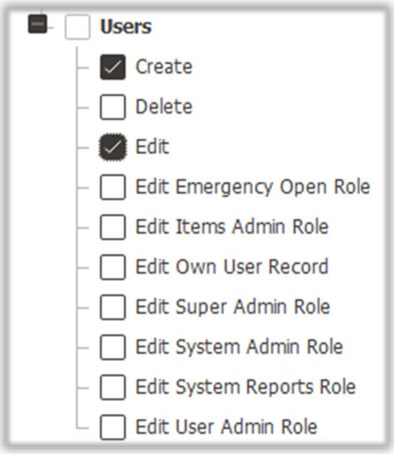
3. To create a new group, click on the **Create** button.



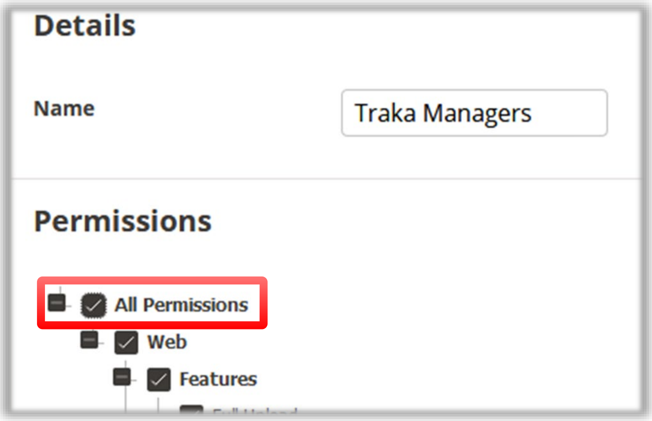
4. You will then be prompted to enter a group name.



5. Under the name field are two expandable tick boxes, one named 'All Permissions', and the other named 'Web'. By default, the 'Web' list will be expanded and will allow you to select which permissions you wish the group to have access to. For example, you may want any users within this group to be able to create and edit users but never able to delete them or allow them to edit System admin or System Reports Roles. To do that, simply access the 'Users' part of the tree and select Create and Edit. Ensure that the remaining roles remain unticked as shown in the example below.



Selecting the 'All Permissions' box will allow all permissions to that group.



NOTE: If you select the title of a group of options then all the sub options within that list are also selected. E.g., iFobs list consists of Edit & Delete. By selecting the header 'iFobs', you will activate all the sub options.

Once the group has been created, you can assign it to a user in the Web Access tab of the user's record.

5.9.2 PERMISSIONS

The following is a list of all the Software Permissions in TrakaWEB.

Permissions

- **All Permissions**
  - **Web**
    - **Features**
      - Full Upload
      - Read Last ID
      - **Remote Release**
        - To Anonymous User
        - To Any User
        - To Authorised Users
      - Remote User Login
      - **Transfer iFob Ownership**
        - To Any User
        - To Authorised Users
    - **Options**
      - Event Times
      - **Notifications**
        - **Extended Categories**
          - Advanced
          - Software
      - Unrestricted Software Item Access
    - **Pages**
      - **Items**
        - Create
        - Delete
        - Edit
        - **Outstanding Faults**
          - Create
          - **Edit**
            - Clear Faults
            - Repair Faults
      - **iFobs**
        - Delete
        - Edit
      - **Groups**
        - **Item Access Groups**
          - Create
          - Delete
          - Edit
          - Edit Everyone Group
      - **Item Booking**
        - **Book For Others**
          - Allow only authorised items to be booked
          - Allow all items to be booked
        - **Book For Yourself**
          - Allow only authorised items to be booked
          - Allow all items to be booked
      - **Pairing**
        - Create
        - Delete
        - Edit
      - Realtime Activity
      - **Reports**
        - **Filtered Reports**
          - Create
          - Delete
          - Edit
        - **Scheduled Reports**
          - Create
          - Delete
          - Edit
        - View Reports
      - **Software Settings**
        - **Access Schedules**
          - Create
          - Delete
          - Edit
        - Activity Types
        - **Fault Definitions**
          - Create
          - Delete
          - Edit
        - **Item Types**
          - Create
          - Delete
          - Edit
        - **Notifications**
          - Create
          - Delete
          - Edit
        - **Reasons**
          - Create
          - Delete
          - Edit
        - **Regions**
          - Create
          - Delete
          - Edit
        - **Software Permissions Groups**
          - Create
          - Delete
          - Edit
        - **User Fields**
          - Edit
        - **User Groups**
          - Create
          - Delete
          - Edit
      - **Systems**
        - Edit
      - **System Viewer**
        - iFob Access
        - iFob Events
        - iFob Items
        - Item Events
        - System Events
      - **Users**
        - Create
        - Delete
        - Edit
        - Edit Emergency Open Role
        - Edit Items Admin Role
        - Edit Own User Record
        - Edit Super Admin Role
        - Edit System Admin Role
        - Edit System Reports Role
        - Edit User Admin Role

5.9.2.1 PERMISSIONS DETAILS

All Permissions:

WEB
By default, the 'Web' list will be expanded and will allow you to select which permissions you wish the group to have access to.

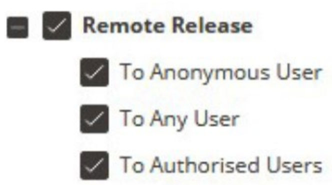
5.9.2.2 FEATURES

Features:

Full Upload
Selecting this checkbox will enable a user to perform a full upload of users, iFobs and events to TrakaWEB.

Read Last ID
Selecting this checkbox will read the last Credential ID presented to a 16bit system within a user record on the Edit User page.

Remote Release:

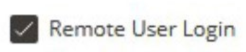


To Anonymous User
Selecting this checkbox will enable a user to release an iFob/item to a user who is not in the database.

To Any User
Selecting this checkbox will enable a user to release an iFob/item to any user in the database

To Authorised User
Selecting this checkbox will enable a user to only release an iFob/item to a user who has been granted access to that item.

Remote User Login
Selecting this checkbox will enable a user to remotely log another user into the system.



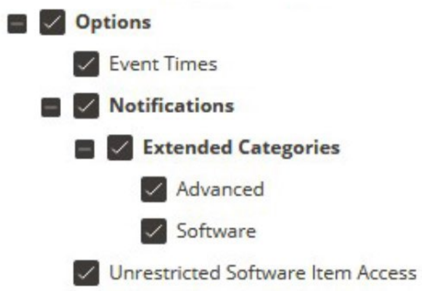
Transfer iFob Ownership:

To Any User
Selecting this checkbox will enable a user to transfer ownership of the item(s) in the selected position to any user in the database whilst the item(s) is/are already out of the system.

To Authorised Users
Selecting this checkbox will enable a user to transfer ownership of the item(s) in the selected position whilst the item(s) is/are already out of the system, providing the user has been granted access to the item(s).

5.9.2.3 OPTIONS

Options:



Event Times
Selecting this checkbox will enable a user to view the times at which events occurred.

Notifications

Extended Categories:

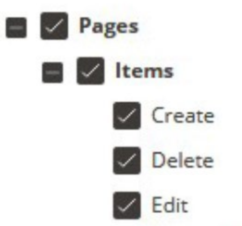
Advanced
Selecting this checkbox will enable a user to edit any advanced category related email notifications.

Software
Selecting this checkbox will enable a user to edit any software category related email notifications.

Unrestricted Software Item Access
Selecting this checkbox will enable a user to 'Edit Own User Record' when ticked and will enable users to edit their own software group details. It will also restrict and unrestrict item access in the Item Booking feature.

5.9.2.4 PAGES

Pages



Items:

Create
Selecting this checkbox will enable a user to add new items to the system.

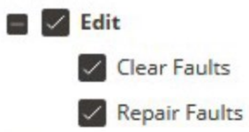
Delete
Selecting this checkbox will enable a user to delete existing items from the system.

Edit
Selecting this checkbox will enable a user to edit existing items in the system.

Outstanding Faults:

Create
Selecting this checkbox will enable a user to create outstanding faults in TrakaWEB

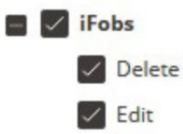
Edit:



Clear Faults
Selecting this checkbox will enable a user to clear existing faults in TrakaWEB.

Repair Faults
Selecting this checkbox will enable a user to repair existing faults in TrakaWEB.

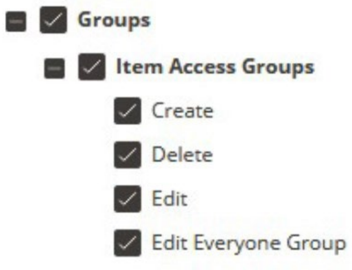
iFobs:



Delete
Selecting this checkbox will enable a user to delete an existing iFob in TrakaWEB.

Edit
Selecting this checkbox will enable a user to edit an existing iFob in TrakaWEB.

Groups



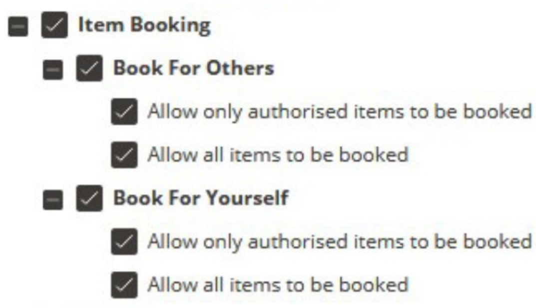
Item Access Groups:

Create
Selecting this checkbox will enable a user to create Item Access Groups in TrakaWEB.

Delete
Selecting this checkbox will enable a user to delete existing Item Access Groups in TrakaWEB

Edit
Selecting this checkbox will enable a user to edit existing Item Access Groups in TrakaWEB

Edit Everyone Group
Selecting this checkbox will enable a user to edit an Item Access Group if it is set as an Everyone Group in TrakaWEB.



Item Booking

Book For Others:
Allow only authorised items to be booked

Selecting this checkbox will enable a user to only book authorised items for others in TrakaWEB.

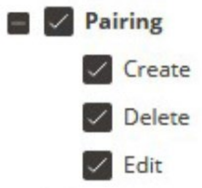
Allow all items to be booked
Selecting this checkbox will enable a user to book all items in the system for others in TrakWEB even if they have not been granted access to them.

Book For Yourself:

Allow only authorised items to be booked
Selecting this checkbox will allow users who have been granted access to particular items to be able to take them during a booking.

Allow all items to be booked
Selecting this checkbox will allow users to take all booked items even if they have not been granted access to them.

NOTE: If Unrestricted Item Access is unticked, the user will only be able to grant items to others that the booking user has access to.



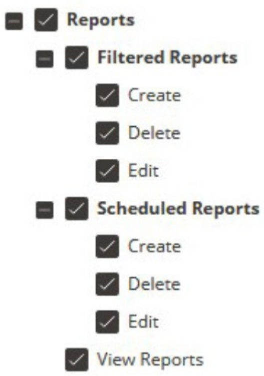
Pairing:

Create
Selecting this checkbox will enable a user to create Item or Locker Pairing rule in TrakaWEB.

Delete
Selecting this checkbox will enable a user to delete an existing Item or Locker Pairing rule in TrakaWEB

Edit
Selecting this checkbox will allow a user to edit existing Item or Locker Pairing rules in TrakaWEB.

Realtime Activity:
Selecting this checkbox will allow a user to access the Realtime Activity page in TrakaWEB.



Reports

Filtered Reports:

Create
Selecting this checkbox will enable a user to create Filtered Reports in TrakaWEB.

Delete
Selecting this checkbox will enable a user to delete existing Filtered Reports in TrakaWEB.

Edit
Selecting this checkbox will enable a user to edit existing Filtered Reports in TrakaWEB.

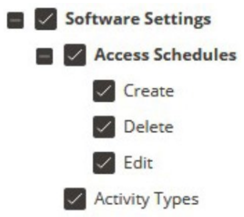
Scheduled Reports:

Create
Selecting this checkbox will enable a user to create Scheduled Reports in TrakaWEB.

Delete
Selecting this checkbox will enable a user to delete existing Scheduled Reports in TrakaWEB.

Edit
Selecting this checkbox will enable a user to edit existing Scheduled Reports in TrakaWEB.

View Reports
This will allow a user to view all available reports in TrakaWEB.



Software Settings

Access Schedules:

Create
Selecting this checkbox will enable a user to create Access Schedules in TrakaWEB.

Delete
Selecting this checkbox will enable a user to delete existing Access Schedules in TrakaWEB.

Edit
Selecting this checkbox will enable a user to edit existing Access Schedules in TrakaWEB.

Activity Types
Selecting this checkbox will enable a user to access the Activity Types page within Software Settings in TrakaWEB.

Software Settings

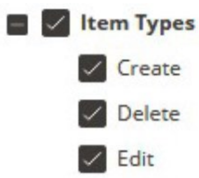
Fault Definitions:

Create
Selecting this checkbox will enable a user to create Fault Definitions in TrakaWEB.

Delete
Selecting this checkbox will enable a user to delete existing Fault Definitions in TrakaWEB.

Edit
Selecting this checkbox will enable a user to edit existing Fault Definitions in TrakaWEB.

Activity Types
Selecting this checkbox will enable a user to access the Activity Types page within Software Settings in TrakaWEB.



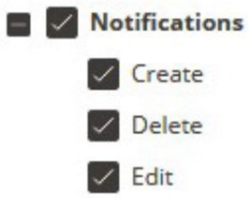
Software Settings

Item Types:

Create
Selecting this checkbox will enable a user to create Item Types in TrakaWEB.

Delete
Selecting this checkbox will enable a user to delete existing Item Types in TrakaWEB.

Edit
Selecting this checkbox will enable a user to edit existing Item Types in TrakaWEB.



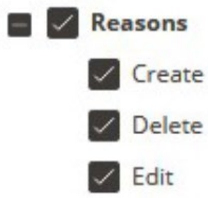
Software Settings

Notifications:

Create
Selecting this checkbox will enable a user to create Email Notifications in TrakaWEB.

Delete
Selecting this checkbox will enable a user to delete existing Email Notifications in TrakaWEB.

Edit
Selecting this checkbox will enable a user to edit existing Email Notifications in TrakaWEB.



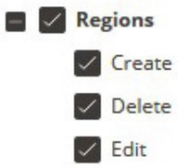
Software Settings

Reasons:

Create
Selecting this checkbox will enable a user to create Reasons in TrakaWEB.

Delete
Selecting this checkbox will enable a user to delete existing Reasons in TrakaWEB.

Edit
Selecting this checkbox will enable a user to edit existing Reasons in TrakaWEB.



Software Settings

Regions:

Create
Selecting this checkbox will enable a user to create Regions in TrakaWEB.

Delete
Selecting this checkbox will enable a user to delete existing Regions in TrakaWEB.

Edit
Selecting this checkbox will enable a user to edit existing Regions in TrakaWEB.

Software Settings

Software Permissions Groups:

Create
Selecting this checkbox will enable a user to create Software Permissions Groups in TrakaWEB.

Delete
Selecting this checkbox will enable a user to delete existing Software Permissions Groups in TrakaWEB.

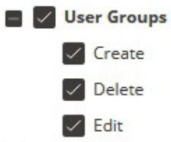
Edit
Selecting this checkbox will enable a user to edit existing Software Permissions Groups in TrakaWEB.

NOTE: The 'Edit Own User Record' option is greyed out when Unrestricted Software Item Access is unticked. This means that members of that Group will not be able to edit their own Software Group details. Therefore, they will not be able to upgrade the group to Full Admin access.

Software Settings

User Fields:

Edit
Selecting this checkbox will enable a user to edit the user details on the User Fields Page in TrakaWEB.



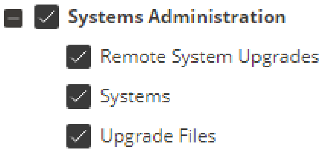
Software Settings

User Groups:

Create
Selecting this checkbox will enable a user to create User Groups in TrakaWEB.

Delete
Selecting this checkbox will enable a user to delete existing User Groups in TrakaWEB.

Edit
Selecting this checkbox will enable a user to edit existing User Groups in TrakaWEB.

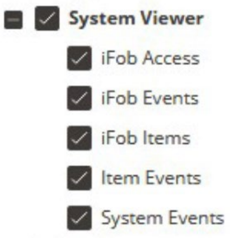


Systems Administration:

Remote System Upgrades
Selecting this checkbox will enable a user to create, edit, and delete remote system upgrades in TrakaWEB.

Systems
Selecting this checkbox will enable a user to edit existing Systems in TrakaWEB.

Upgrade Files
Selecting this checkbox will enable a user to upload and manage Traka Touch App and OS files.



System Viewer:

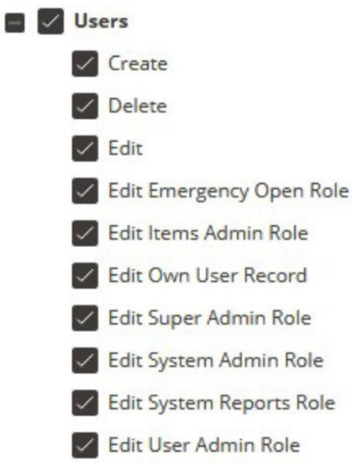
iFob Access
Selecting this checkbox will enable a user to view the iFob Access panel on the System Viewer page in TrakaWEB.

iFob Events
Selecting this checkbox will enable a user to view the iFob Activity panel on the System Viewer page in TrakaWEB.

iFob Items
Selecting this checkbox will enable a user to view the Item Activity panel on the System Viewer page in TrakaWEB.

Item Events
Selecting this checkbox will enable a user to view the Items panel on the System Viewer page in TrakaWEB.

System Events
Selecting this checkbox will enable a user to view the System Activity panel on the System Viewer page in TrakaWEB.



NOTE:

The 'Edit' option must be checked for a user to be able edit other user credentials and roles in TrakaWEB.

A user cannot edit users in Software Permissions Groups that have higher permissions than themselves.

The 'Edit Own User Record' option is greyed out when Unrestricted Software Item Access is unticked. This means that members of that Group will not be able to edit their own Software Group details.

Users:

Create
Selecting this checkbox will enable a user to create/add users to the system.

Delete
Selecting this checkbox will enable a user to delete existing users from the database.

Edit
Selecting this checkbox will enable a user to edit existing users on the database.

Edit Emergency Open Role
Selecting this checkbox will enable the user to grant other users with the Emergency Open role in TrakaWEB.

Edit Items Admin Role
Selecting this checkbox will enable the user to grant other users with the Items Admin role.

Edit Own User Record
Selecting this checkbox will enable a user to edit their own user record.

Edit Super Admin Role
Selecting this checkbox will enable a user grant other users with the Super Admin role.

Edit System Admin Role
Selecting this checkbox will enable a user to grant other users with the System Admin role.

Edit System Reports Role
Selecting this checkbox will enable a user to grant other users with the System Reports role.

Edit User Admin Role
Selecting this checkbox will enable a user to grant others with the User Admin role.

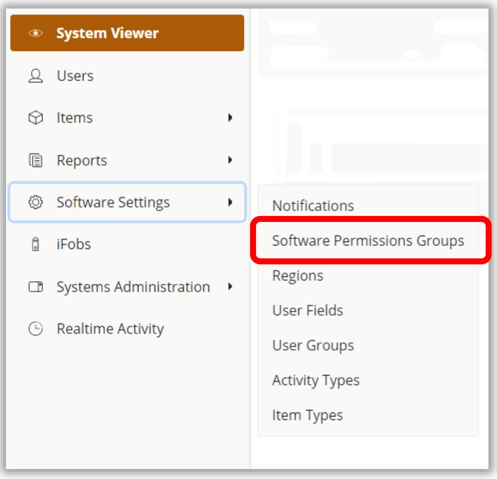
5.9.3 CREATING A RESTRICTED ADMIN ACCESS GROUP

Occasionally, you may want to grant a group with limited Admin rights. For example, you may want a manager to be able to administrate the Items, iFobs and Groups within their department, but not have access to the assets outside of their department.

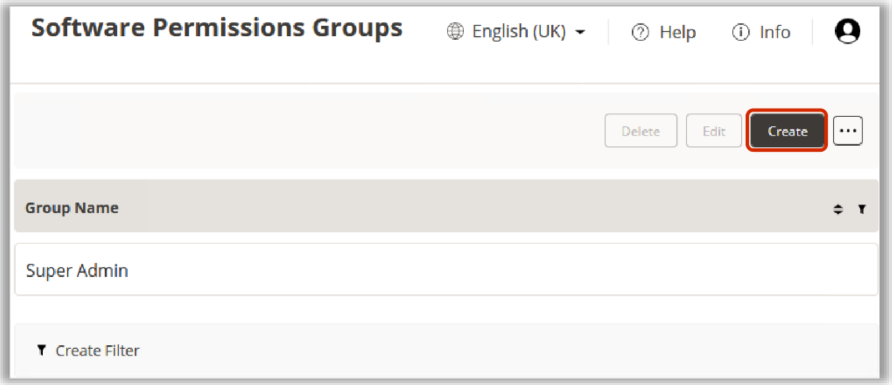
This, however, is not related to the functionality of Regions whereby an Administrator may only edit users that have the same or lower region set as the user they are editing. For more information on the rules applicable to Regions, please refer to the **Regions** section.

NOTE: A member of a restricted admin group cannot edit their own group, or the Super Admin group.

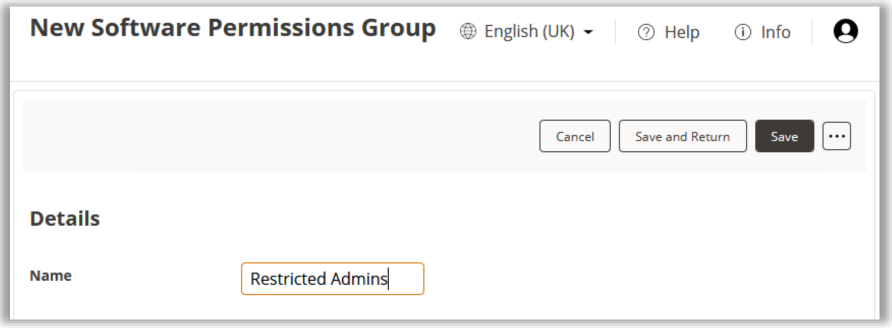
1. Using the Navigation Menu to the left of the page, click Software Settings, then select Software Permissions Groups.



2. To create a new group, click on the **Create** button.

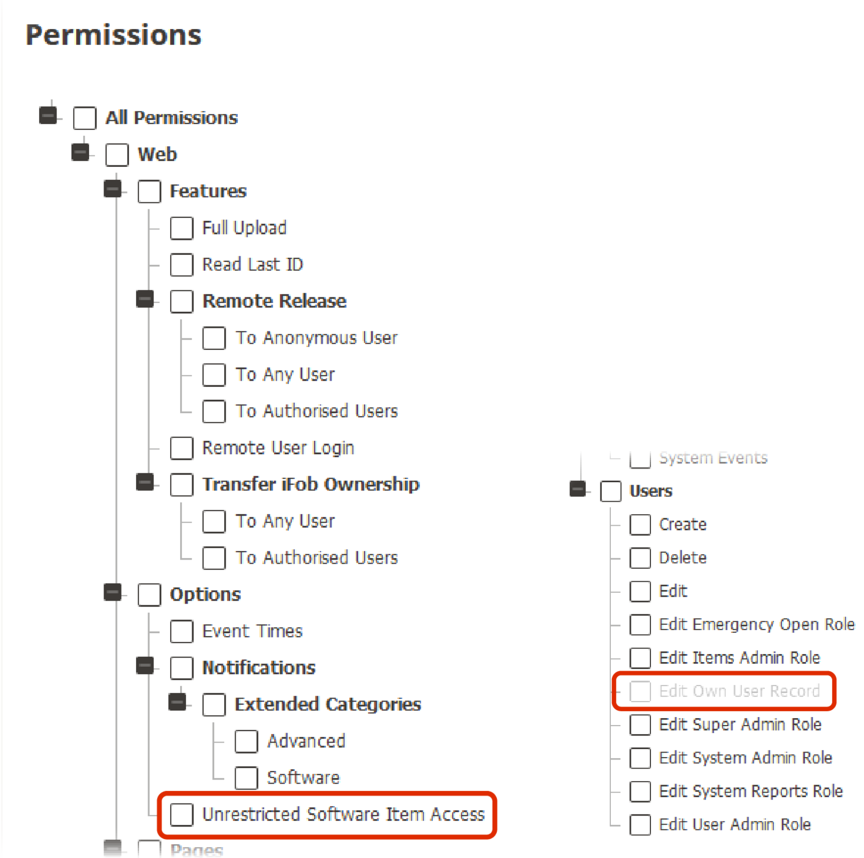


3. You will then be prompted to enter a group name.



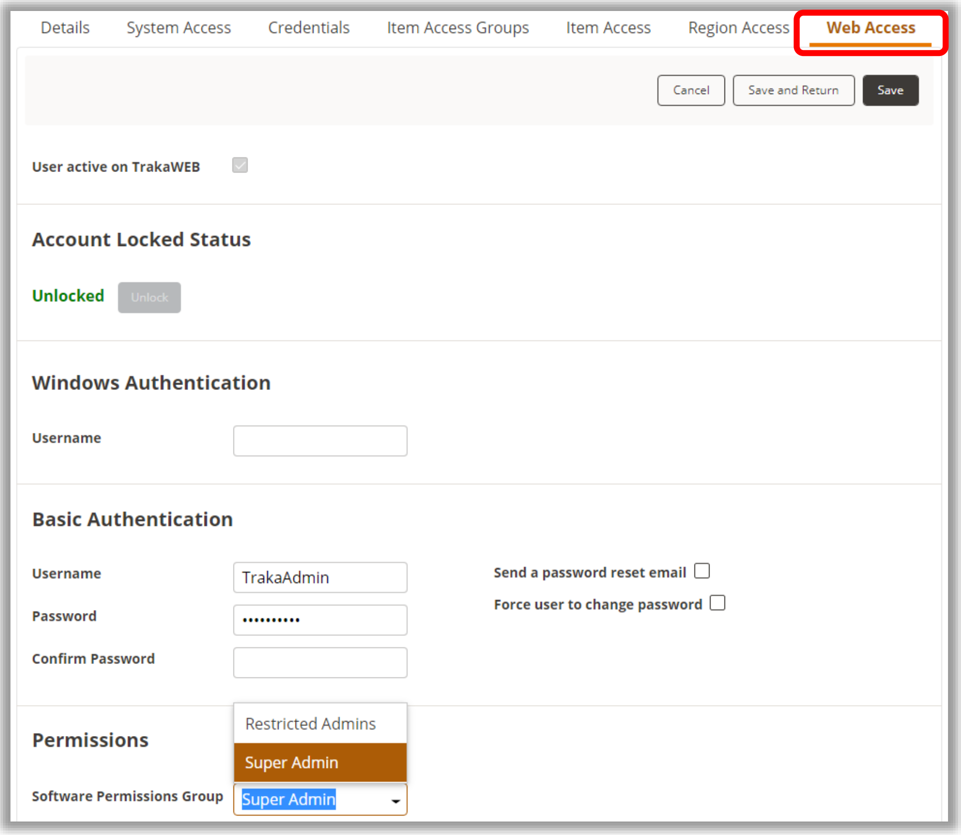
4. Under the name field are two expandable tick boxes, one named 'All Permissions', and the other named 'Web'. In the 'Web' list, select which permissions you wish the Group to have.

NOTE: The 'Edit Own User Record' option is greyed out when Unrestricted Software Item Access is unticked. This means that members of that Group will not be able to edit their own Software Group details. Therefore, they will not be able to upgrade the group to Full Admin access.



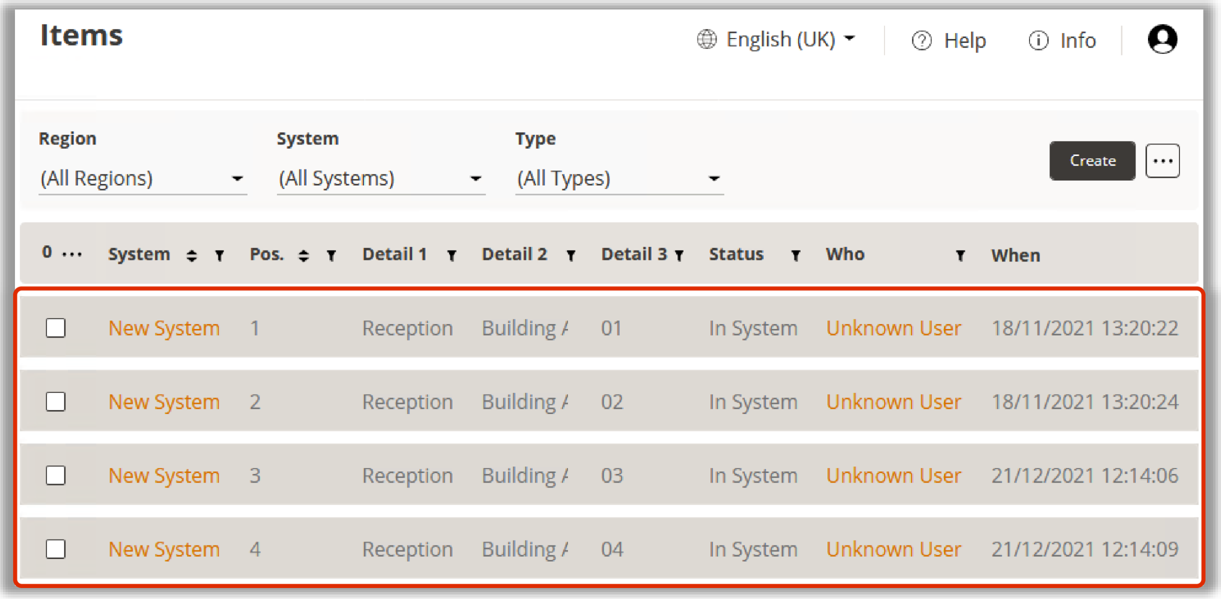
NOTE: If a restricted admin creates a new Item Access Group, the admin user will be automatically added to that Group, so that they are able to perform administration to it.

Once the group has been created, you can assign it to a user in the Web Access tab of their record.

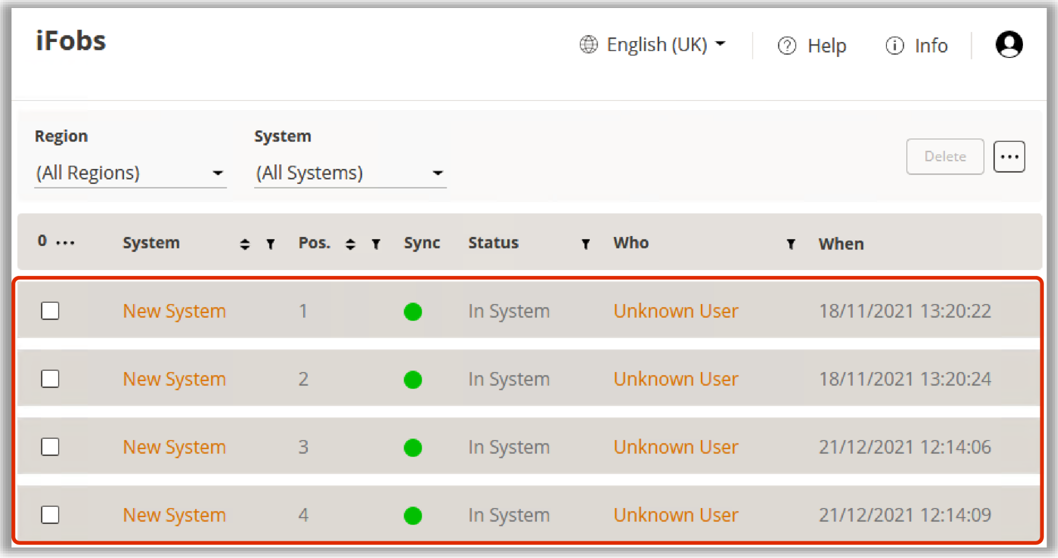


5.9.4 RESTRICTIONS APPLIED TO THE RESTRICTED ADMIN GROUP

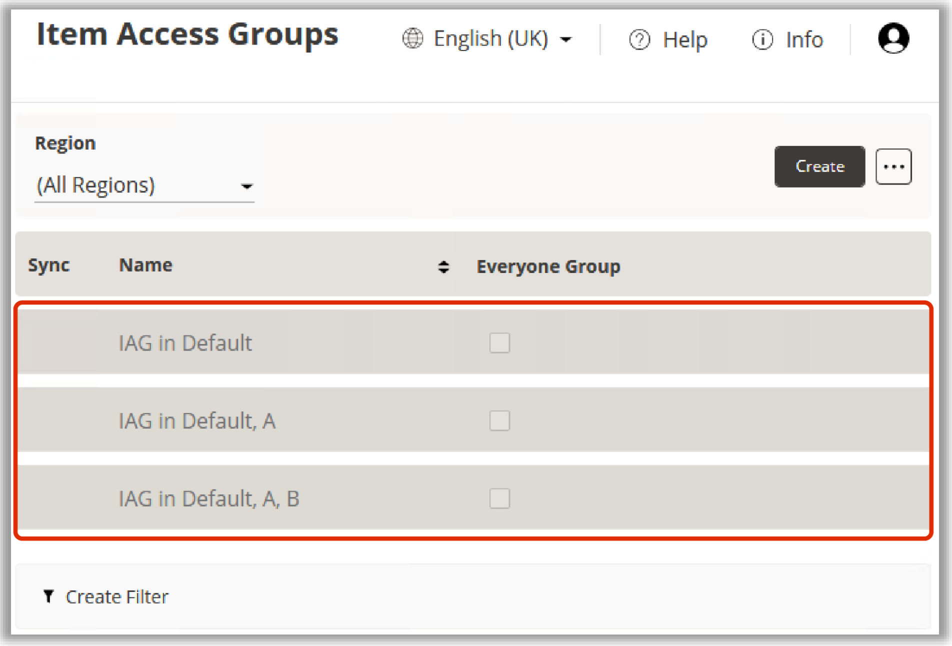
Once the restricted admin user logs into TrakaWEB, they will notice that when they attempt to edit an Item, iFob or Item Access Group, anything that they do not have admin rights to, will be greyed out and not available to edit.



Items

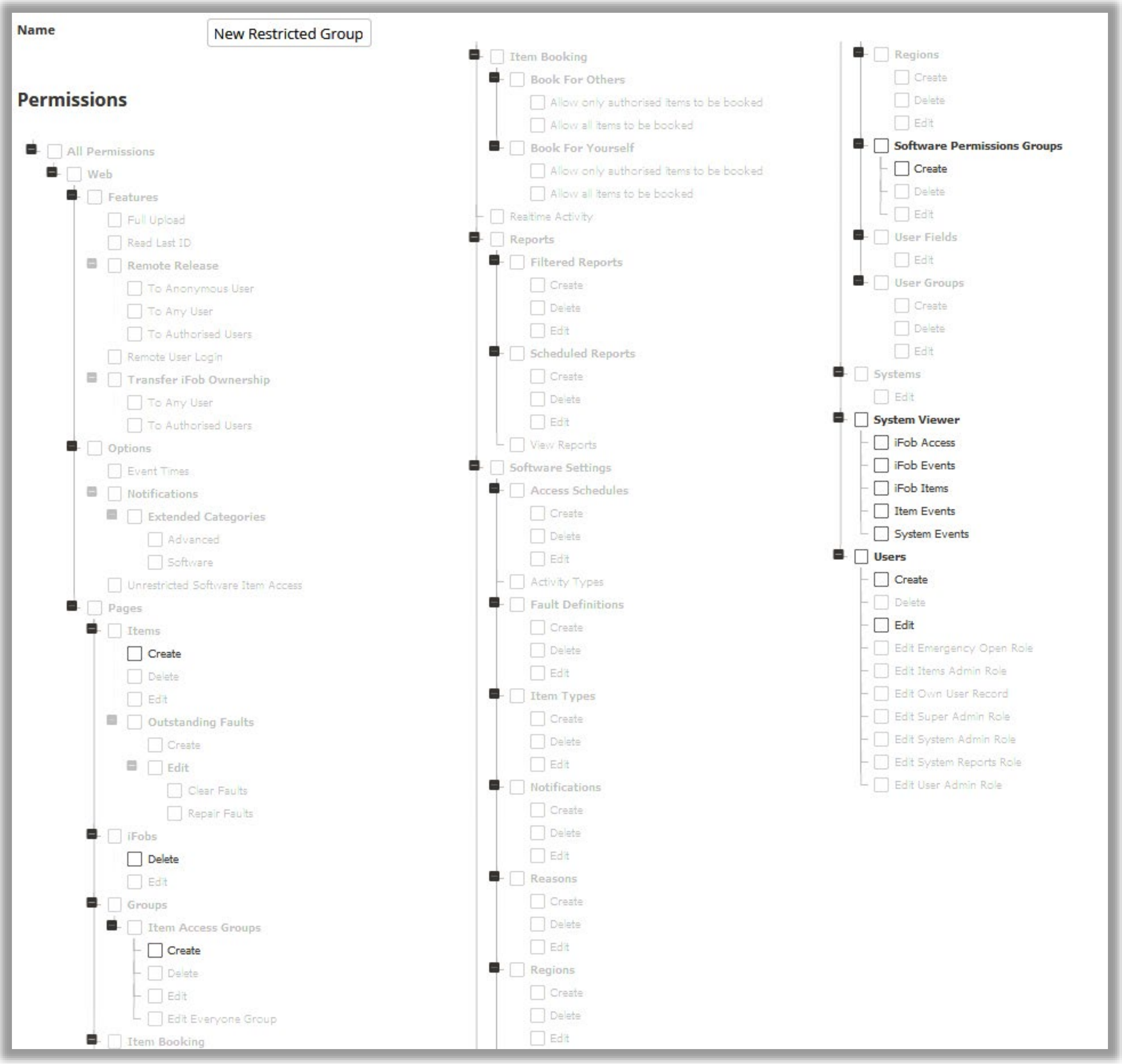


iFobs



Item Access Groups

A further security protocol set in place is that if a user is assigned to the Restricted Admin Access Group, and has been granted 'Software Permissions Groups' access, they will only be able to create a group with the same access level, or lower than their own. Any options that they do not have access to themselves, will be greyed out and will not be selectable, as shown in the example below.

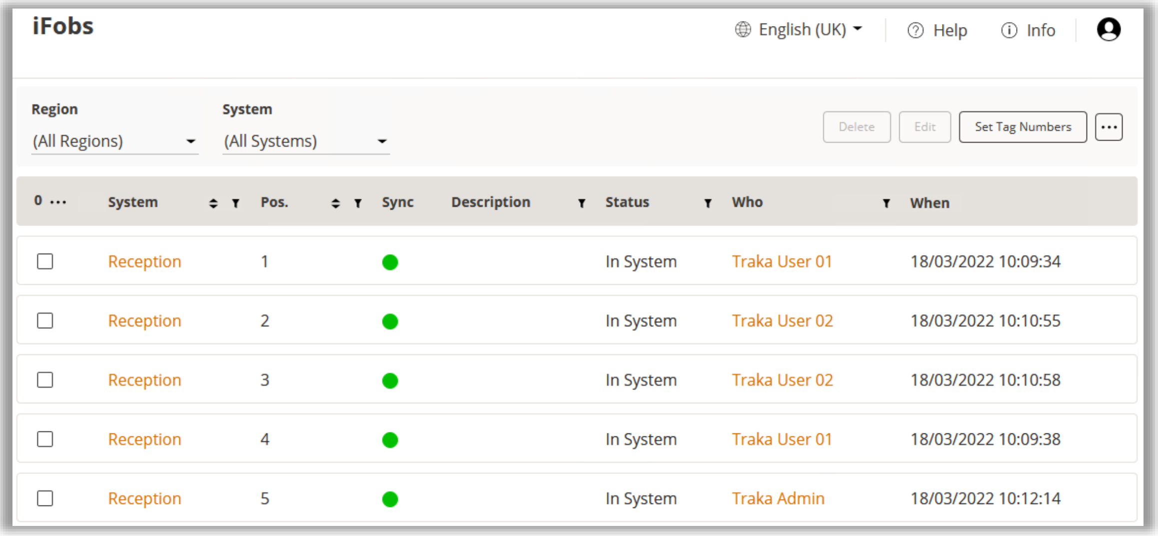


5.10 IFOBS

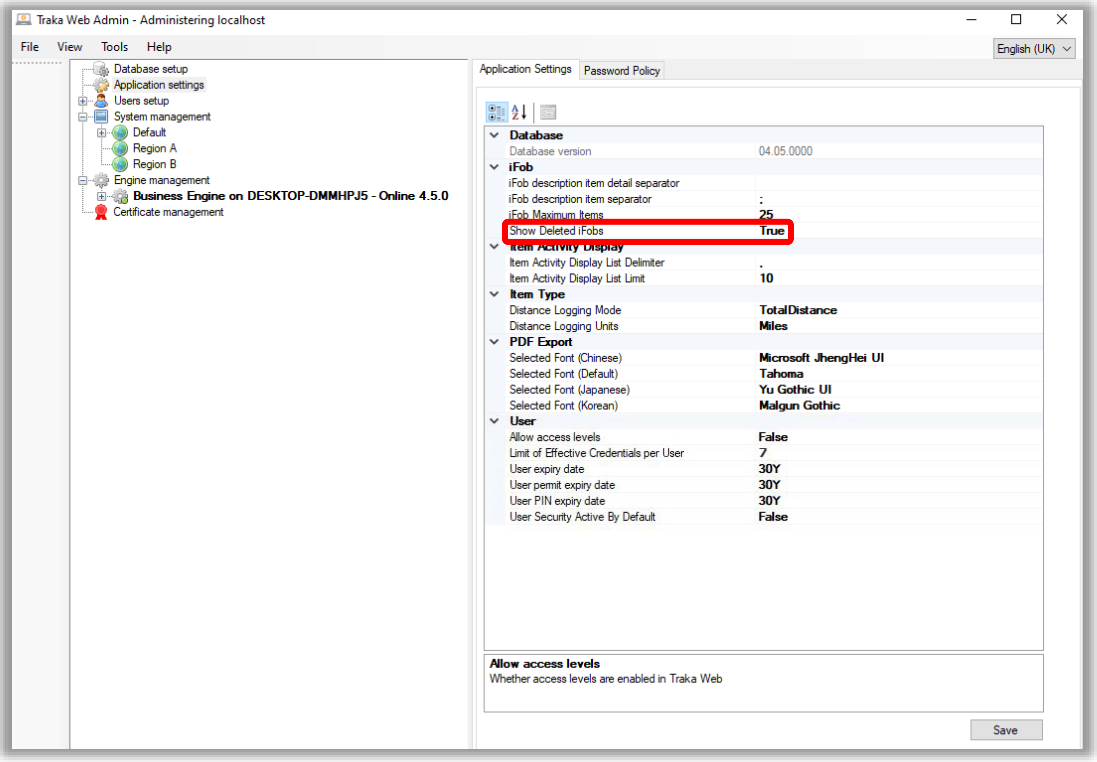
5.10.1 IFOB LIST

NOTE: If your system is an RFID Locker System, it will not contain iFobs. However, this section will still be relevant and the term 'iFob' will be referring to the 'RFID Tag' in a Locker System.

From the Navigation Menu to the left of the screen click the iFobs option. You will then be taken to the iFob list. All the iFobs in your Traka Touch system will automatically synchronise when you log into TrakaWEB (providing you enabled communications from your Traka Touch system). The list shows all the iFobs that are currently in all your Traka Touch systems, their current status & various definable detail columns.



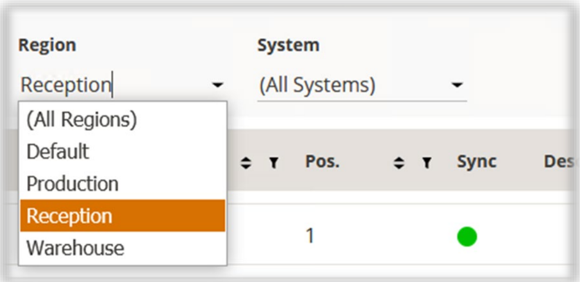
It is possible for users to show or hide iFobs in the iFob list which have been deleted. This option is available through the Admin App.



For more information, please refer to **TD0216 – TrakaWEB Version 4 Installation & Configuration Guide.**

Region & System Filter

When looking at the iFob list, at the top of the table you can filter the iFobs you wish to view by defining the Region the system belongs to, and the system the iFob belongs to. Clicking on the relevant field will show you a list of selectable systems & regions (providing that your database has more than one region and system). For more information, see the Regions and Systems topics.



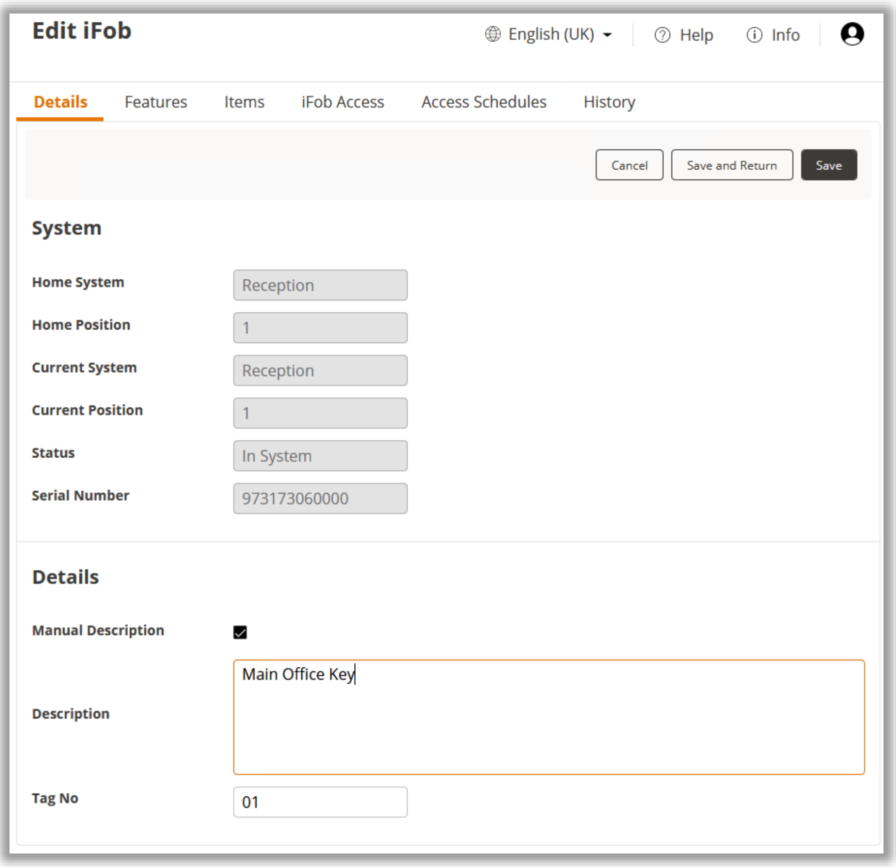
Sync Column

The status of the iFob is defined by a graphic next to the iFob description. If the status image is green, then all events from the iFob are up-to-date and have been read back to TrakaWEB. If the events from the iFob have not been read back from the Traka Touch system, then the image will take the shape of a progress circle.

5.10.2 IFOB DETAILS

NOTE: If your system is an RFID Locker System, it will not contain iFobs. However, this section will still be relevant and the term 'iFob' will be referring to the 'RFID Tag' in a Locker System.

The details tab displays a range of information for the selected iFob, including the iFob description and the system the iFob belongs to. These are listed in more detail below.



System

Home System

Displays the name of the system the iFob belongs to.

Home Position

Displays the position in which the iFob is located in the system.

Current System

Displays the name of the system the iFob is currently stored in. This system will only be different from the Home System if you have the Random Return to Multiple Systems (RRMS) feature option enabled.

Current Position

Displays the position in which the iFob is currently stored in the Current System. This position will only be different from the Home Position if you have the Random Return to Single System (RRSS) or Random Return to Multiple Systems (RRMS) feature options enabled.

Status

This field will show the status of the iFob e.g. Out of the System.

Details

Manual Description

Check this box to enable the description field below. If this box is unchecked, then the description from an assigned item to that iFob can be used. Refer to 'iFob Description Order' in the Adding New Item Types section for more information.

Description

Here you can view the iFob description. This can be automatically generated by the item details, or you can change the description by checking the Manual Description tick box above and entering manually.

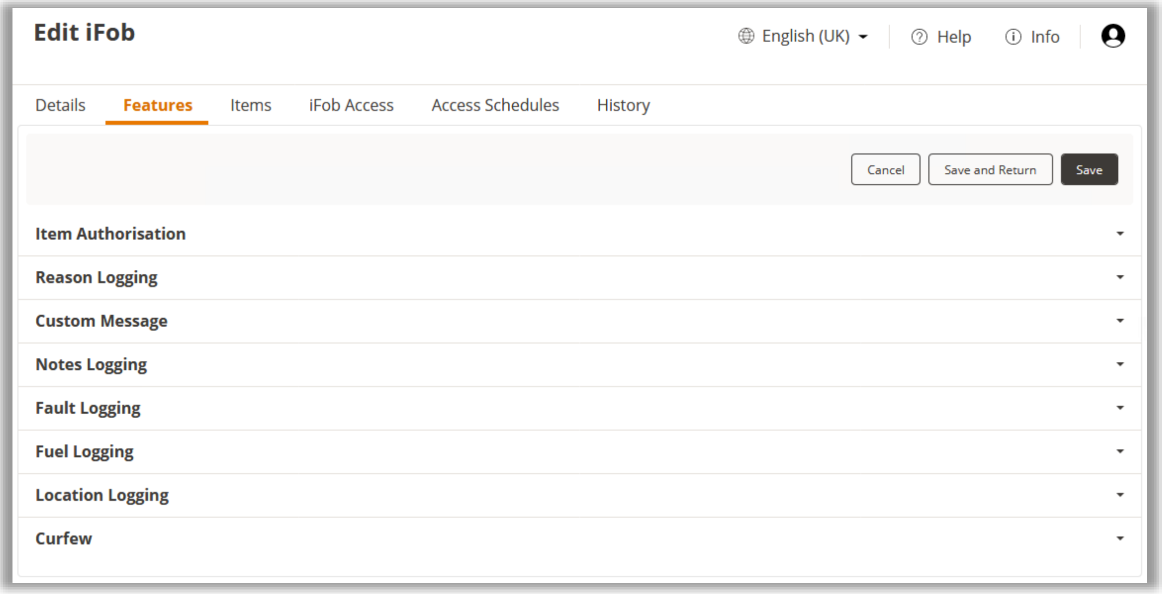
Tag No

This section allows you to enter a tag number for the iFob position.

5.10.3 FEATURES

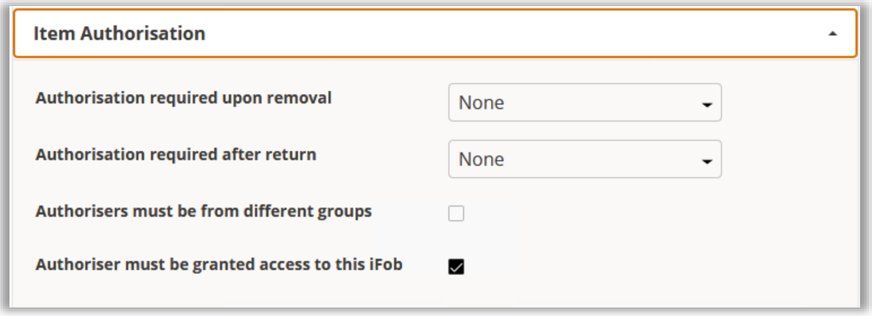
The features tab allows you to switch any pre-enabled options on or off. From here, you can also set item curfews.

For more information on Features, please refer to the Feature Options sections of this document.



Item Authorisation

From this drop-down selection box, you can choose how many users are required to authorise the release of this iFob/item. To read more about this feature, please refer to the Authoriser section in this document.



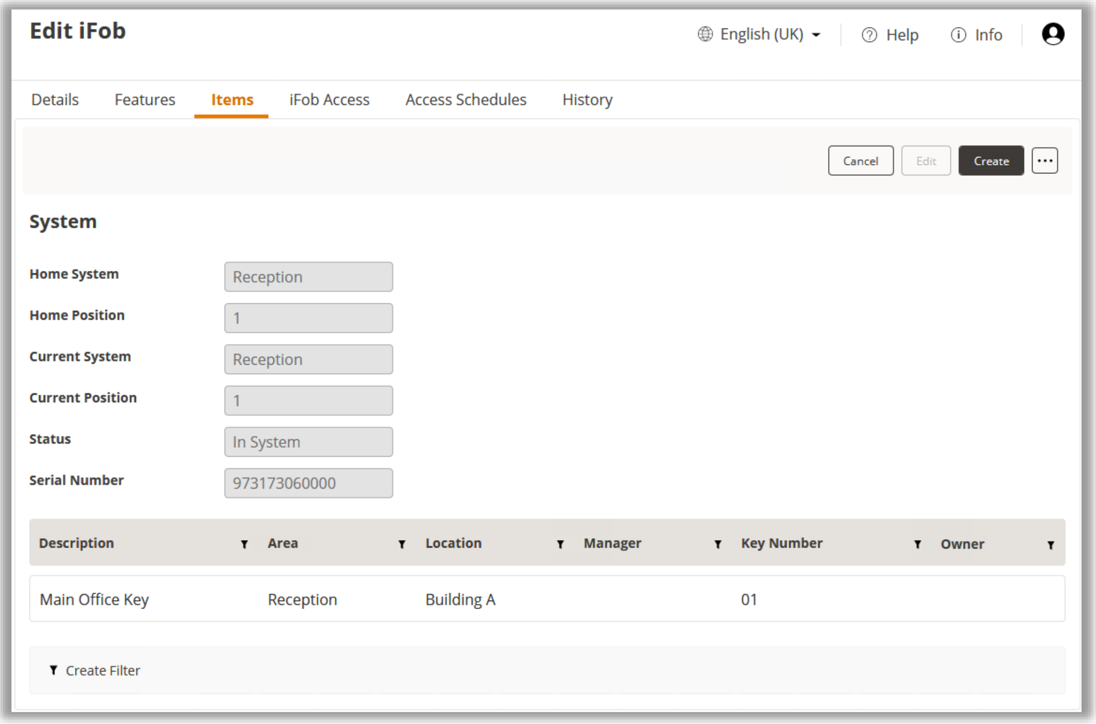
Curfew

Curfew Type

Curfews are a non-cost option built into TrakaWEB and are used to reduce the amount of time an item is out of the system, or how long a user can have an item in their possession. Please view the Curfews section for more details.

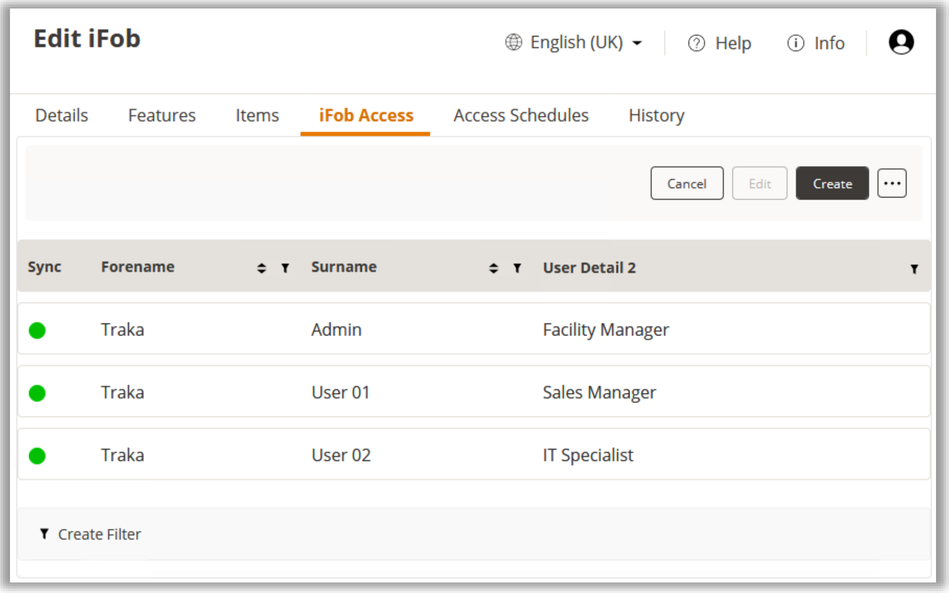
5.10.4 ITEMS

The items tab has information on the items attached to the iFob, the system the item belongs to, and the serial number of the iFob the item is assigned to etc. You can edit the item from the iFob by clicking **Edit** or create a new item associated with this iFob by clicking **Create**.



5.10.5 IFOB ACCESS

This tab shows a list of users who currently have access to the selected iFob.



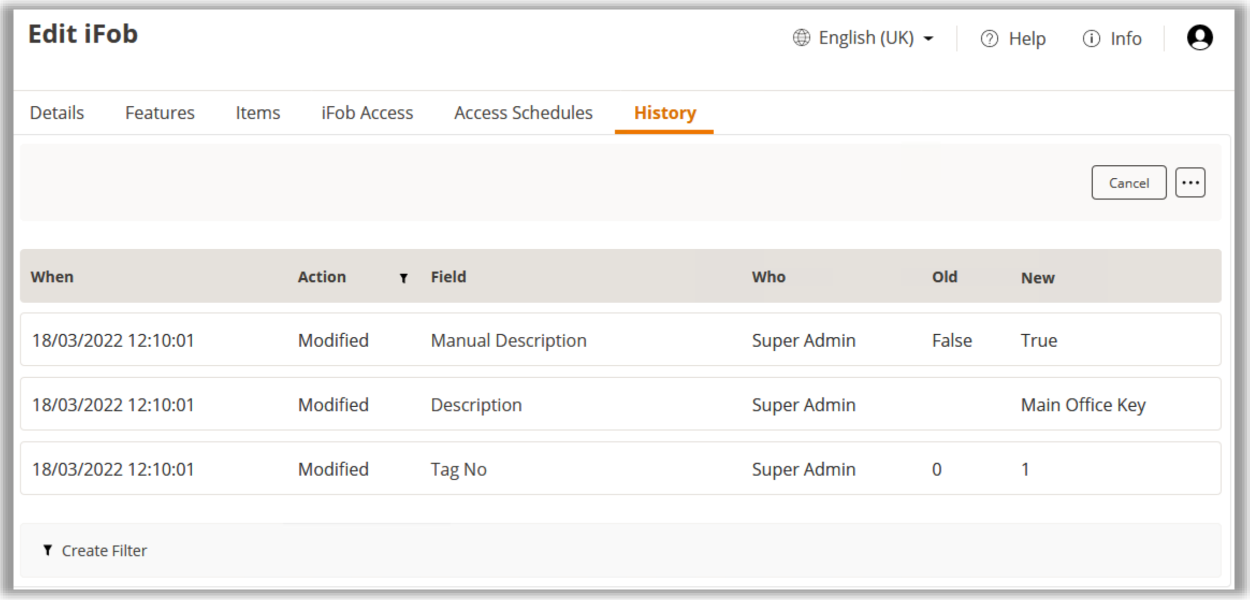
5.10.6 ACCESS SCHEDULES

Access Schedules is one of the optional Features offered on TrakaWEB. It allows you to set preferred periods in a weekly pattern when the iFob would be available to users.

For more information on Features, and Access Schedules specifically, please refer to the Feature Options sections of this document.

5.10.7 HISTORY

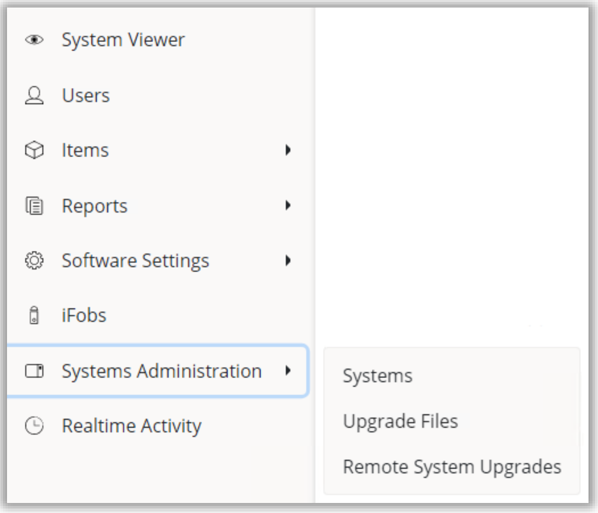
The History tab will show you a record of when the item was added or modified, whom by, and which details were changed with their old and new values listed accordingly.



5.11 SYSTEMS ADMINISTRATION

5.11.1 UPGRADE FILES

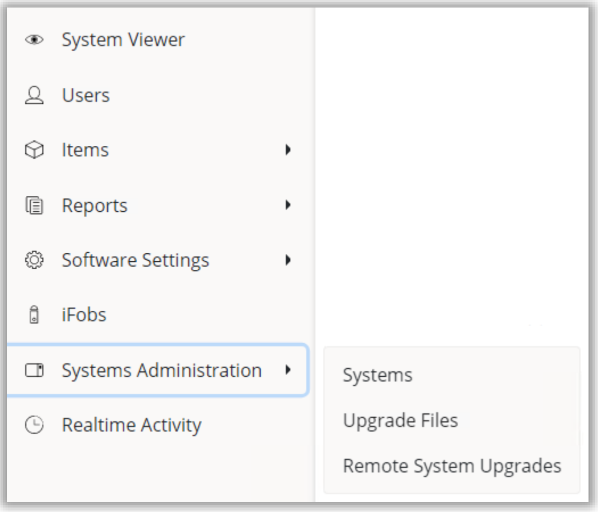
From the Navigation Menu, select **Systems Administration** and then **Upgrade Files.**



From here, you can upload and delete Traka Touch App and OS files used for the Remote System Upgrade. For further details on Upgrade Files and Remote System Upgrades, please refer to **TD0216 – TrakaWEB Version 4 Installation & Configuration Guide**.

5.11.2 REMOTE SYSTEM UPGRADES

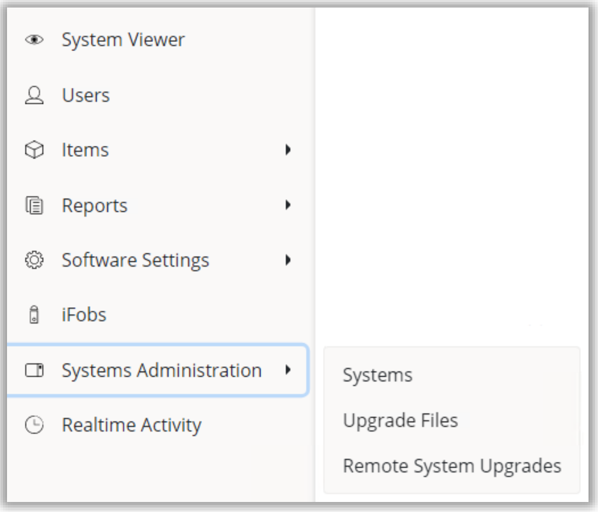
From the Navigation Menu, select **Systems Administration** and then **Remote System Upgrades.**



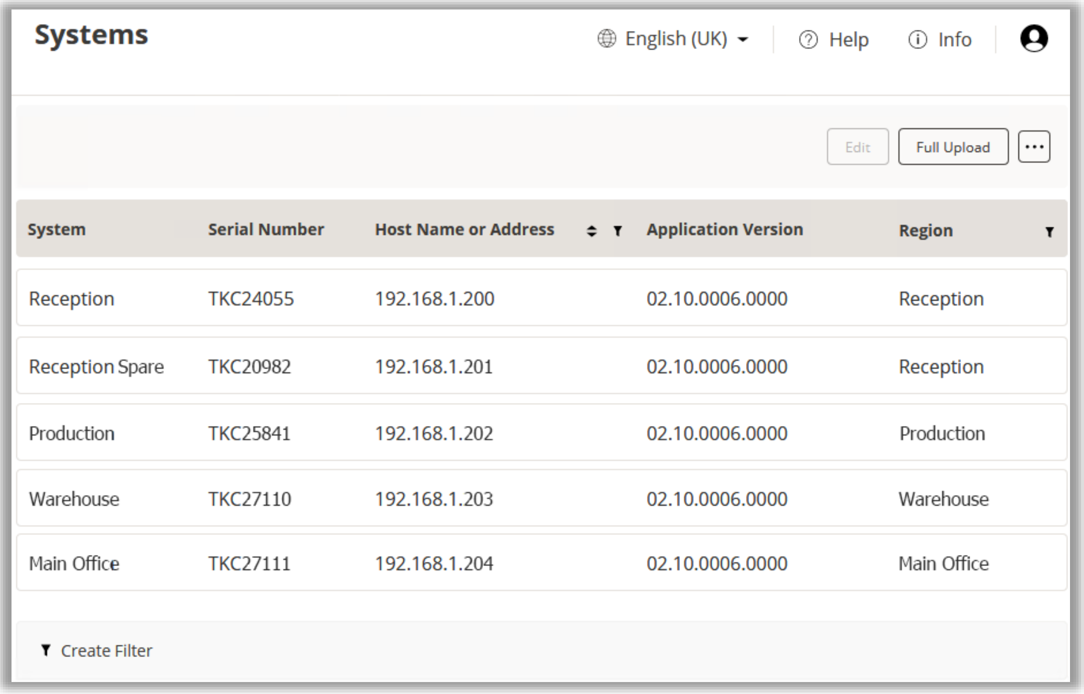
From here you can create, edit and delete Remote System Upgrades. For further details on Remote System Upgrades, please refer to **TD0216 – TrakaWEB Version 4 Installation & Configuration Guide**.

5.11.3 SYSTEMS

From the Navigation Menu, select **Systems Administration** and then **Systems.**



From here, you can view or edit the systems you currently have in the database.



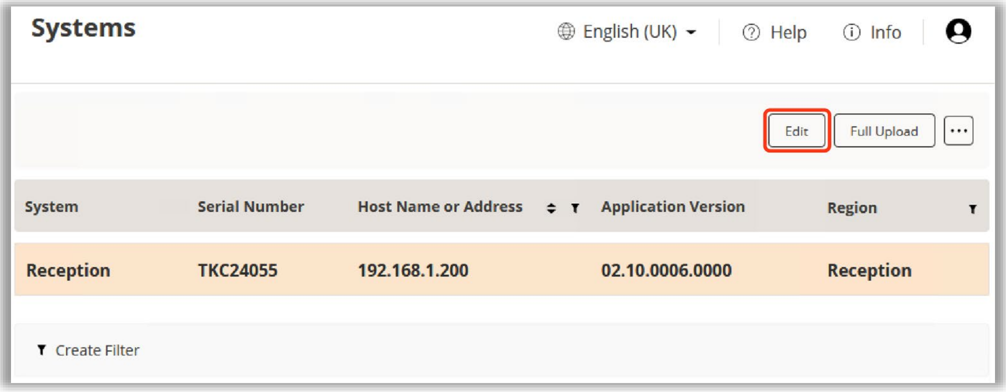
Show/Hide Grid Columns

Throughout TrakaWEB, there are many grids that display important information for the page you are currently viewing. For example, the Users' page has the Users' List Grid, which displays all of the users within the database. The Show/Hide Grid Columns button in the Ellipsis menu allows you to add or remove fields/columns of your choice to the grid.

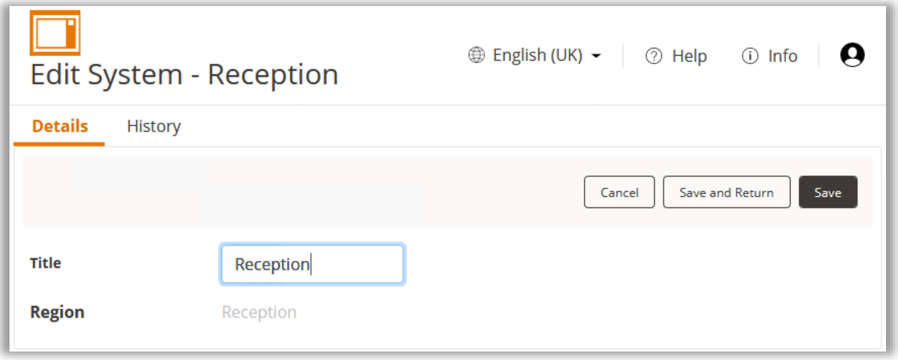
5.11.4 EDITING A SYSTEM

1. From the Navigation Menu, select **Systems**.

2. You will then be taken to the **Systems** page. Select the system you wish to change and click the **Edit** button.



3. The **Edit System** page allows you to change the name of the system it belongs to.



4. Once the change has been made, click the **Save and Return** button to be taken back to the systems list.

5.11.5 CHANGING THE TIME ZONE

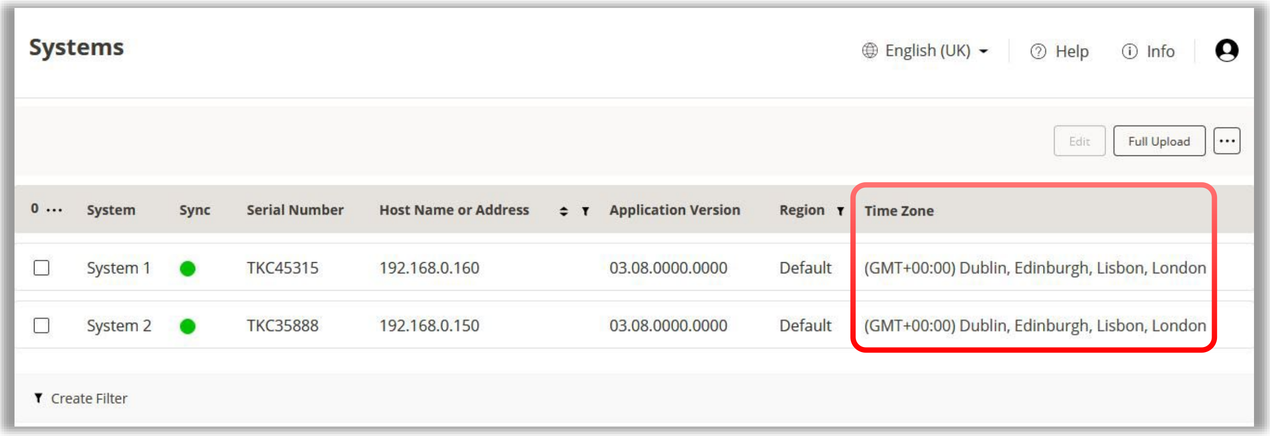
A time zone change feature is available in TrakaWEB that will enable the time zones to be centrally changed on all connected Traka Touch devices. This is particularly useful for cruise ships which often change time zones and need to be able to accurately audit when events are occurring at the Traka Touch system and have to manually change the time zone on each individual system. Using TrakaWEB this can be achieved via an individual or Multi Select-Multi Edit process.

NOTE: This functionality is only available for systems that are Traka Touch version 3.8.0 and above. 16bit systems are also out of scope for this functionality.

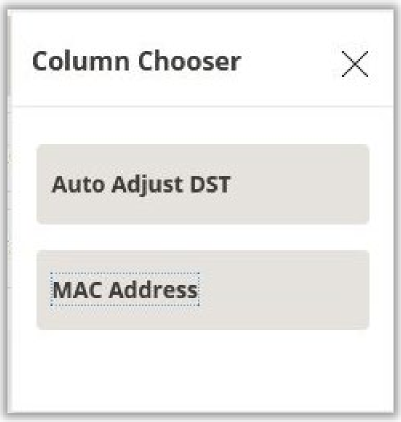
Systems Grid

1. From the Navigation Menu, select **Systems.**

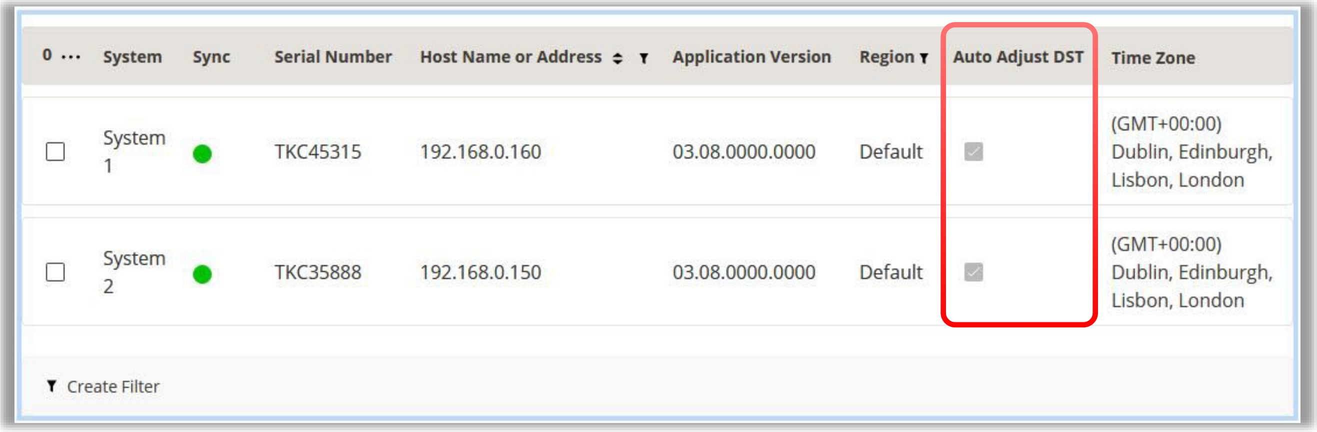
A **Time Zone** column will be displayed showing the current time zones of all the available systems.



Using the **Show/Hide Grid Columns** option from the ellipsis menu, it is possible to add another column named **Auto Adjust DST.**



This may be added to the Systems Grid as required. By default, the checkbox will be greyed out. If the **Automatically adjust for daylight saving time** checkbox is not ticked when adjusting the time zone, then the **Auto Adjust DST** checkbox will show as unticked.

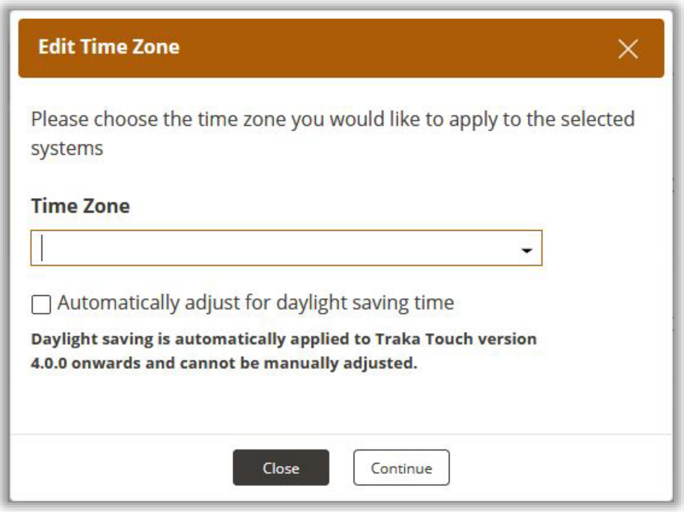


For more information on adding or removing columns, please refer to the **Show/Hide Grid Columns** section.

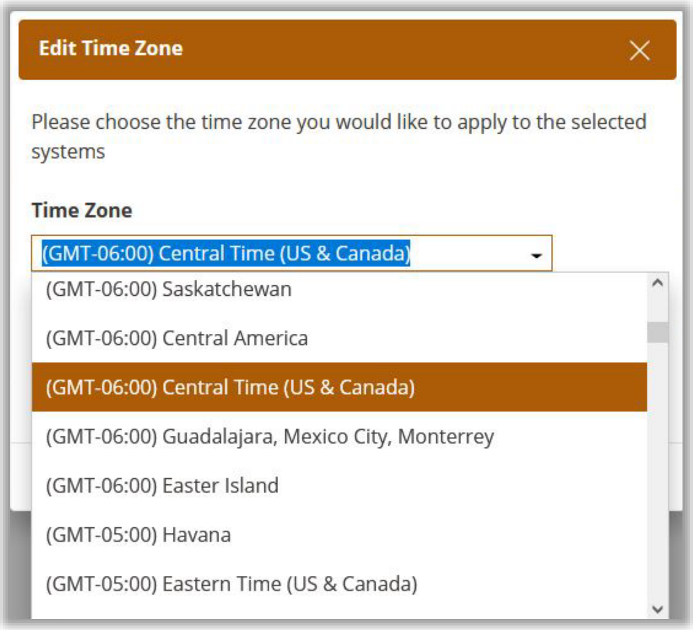
Individual System Time Zone Change

1. To edit the time zone of an individual system, select the check box to the left side of the grid, then right click and select **Edit Time Zone.**

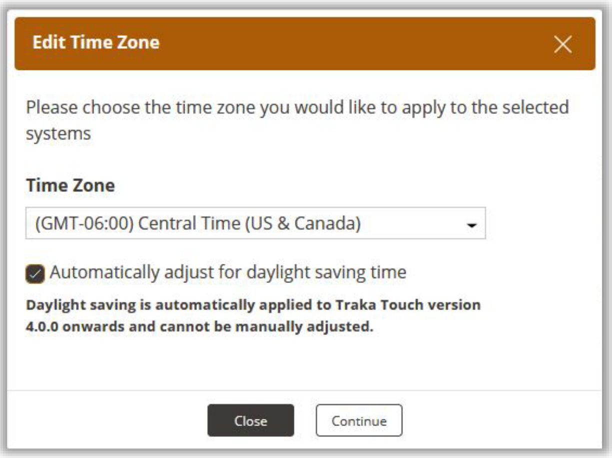
A window will display which will enable you to adjust the time zone and automatically adjust for daylight saving time.



2. From the drop-down menu, choose the time zone for the selected system.



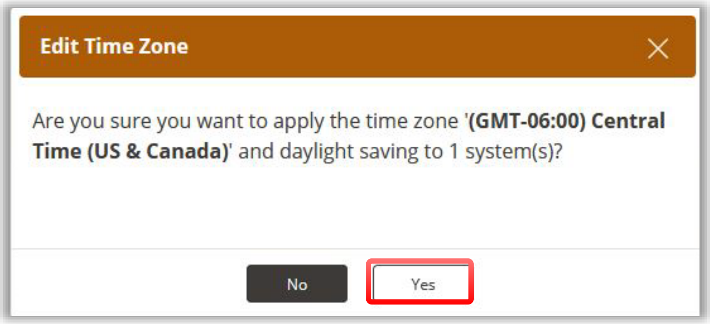
You may also choose to automatically adjust the time zone by placing a tick in the checkbox for **Automatically adjust for daylight saving time.**



A note is displayed below the checkbox stating that from Traka Touch version 4.0.0 onwards, daylight saving is automatically applied and cannot be manually adjusted.

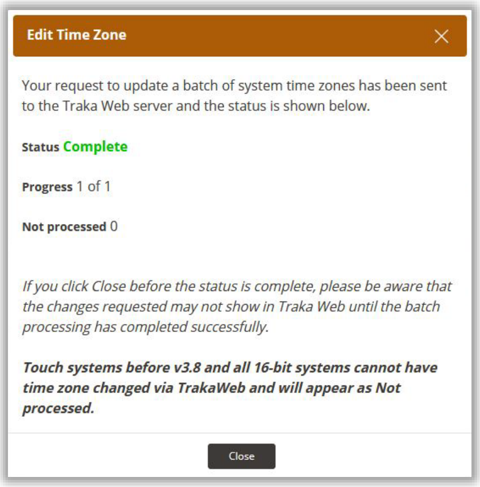
3. Once complete, click on the **Continue** button.

A new window will appear asking you to confirm that you wish to apply the chosen time zone. If you are satisfied with the chosen details, select **Yes** to continue.



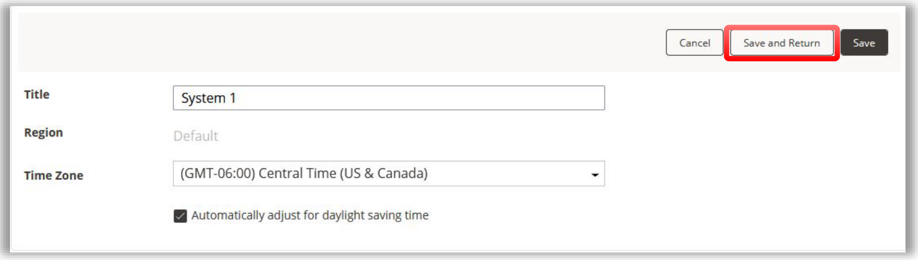
The time zone for the selected will now be changed

4. Once complete, click on the **Close** button.



NOTE: If the Touch system is pre-version 3.8 or 16bit, the time zone will not be changed.

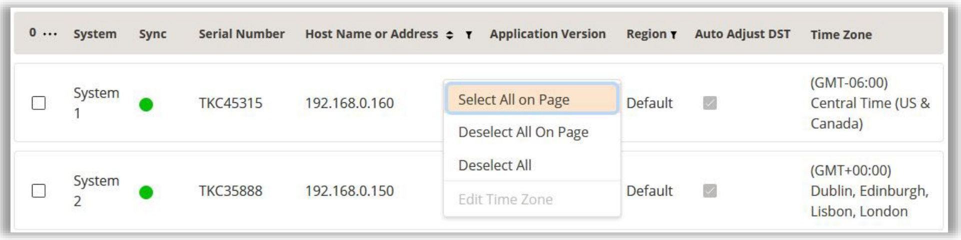
Besides right-clicking and choosing **Edit Time Zone**, you can manually adjust a single system by double-clicking within the grid. This will direct you to the **Edit System** page where you may carry out the same process as previously shown. Once completed, click on the **Save and Return** button.



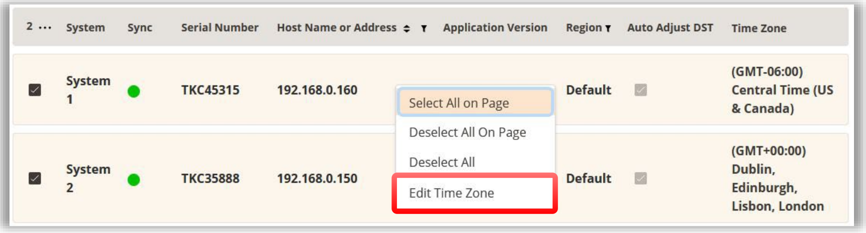
NOTE: Once you edit the time zone of a Traka Touch system, it will automatically restart providing no users are currently logged in.

Multiple Systems Time Zone Change

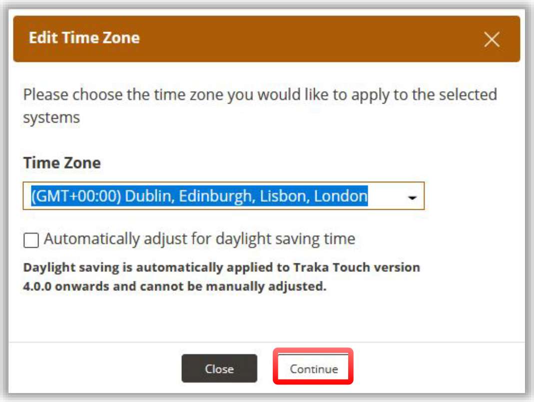
1. To change the time zone on multiple systems simultaneously, right-click on the grid and choose **Select All on Page.**



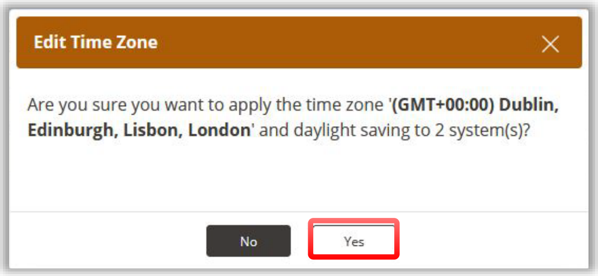
2. With all the systems selected, right-click again and select **Edit Time Zone.**



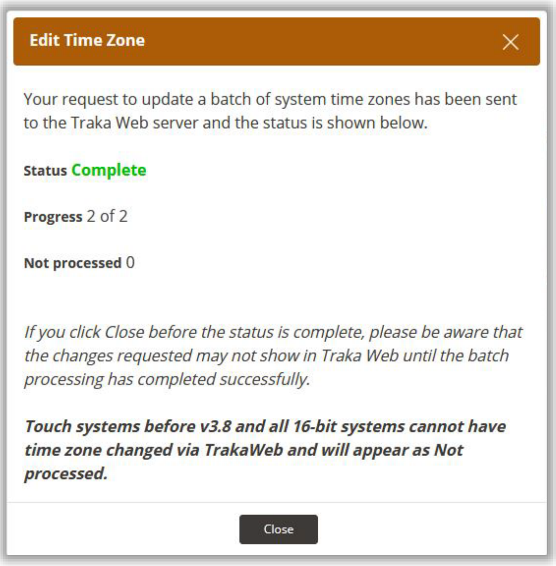
3. Repeat the previous steps and choose a time zone to be applied to all the selected systems and then select **Continue**.



4. Next, confirm that you wish to apply the chosen time zone to the selected systems by clicking on **Yes**.

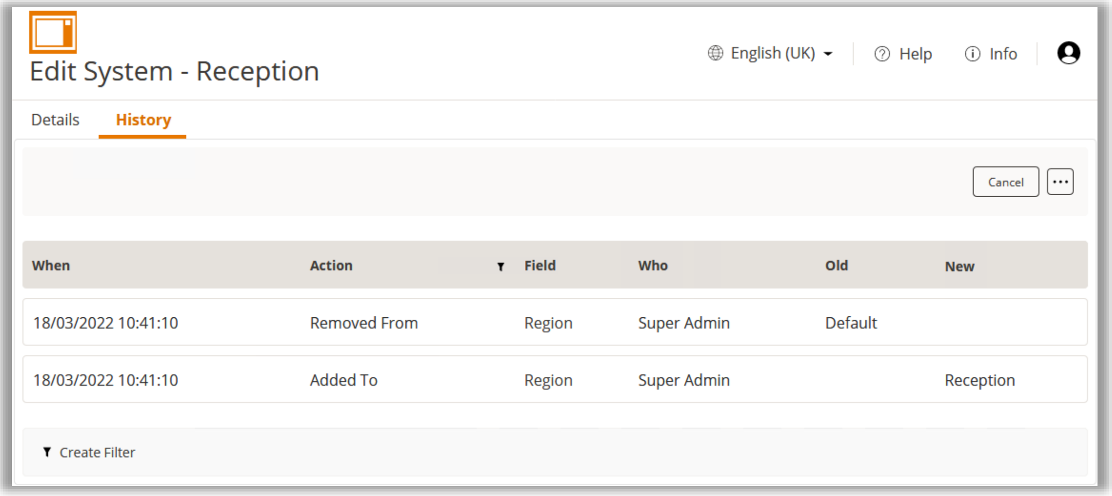


The time zone will then be added to the selected systems and the selected Touch systems will restart.



5.11.6 HISTORY

The History tab will show you a record of when the system was modified, whom by, and which details were changed with their old and new values listed accordingly.

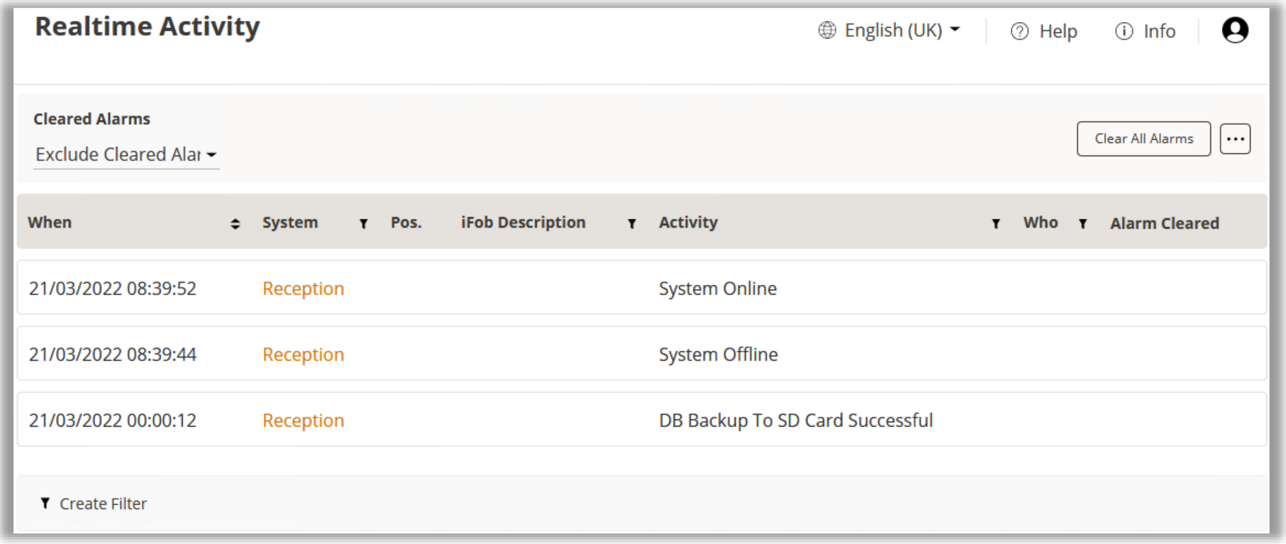


5.12 REALTIME ACTIVITY

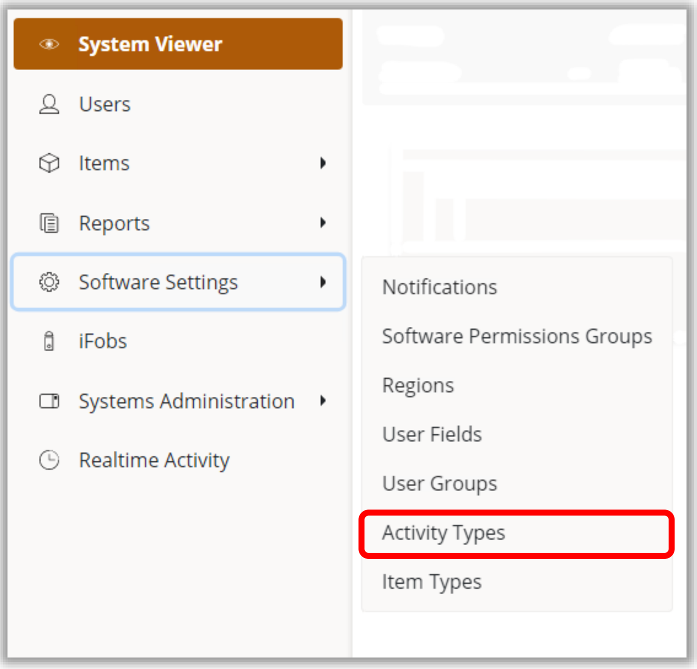
The Realtime Activity Grid allows you to view up to 24 hours' worth of activities and alarms that transpire at the Traka Touch system. From here, you can view who triggered the activity, the date and time it occurred, the system the activity took place, the position in the system the activity affected (if any) etc.

You cannot remove any activities from this grid manually and after 24 hours the list will update and show the most recent activities. You can view the history of activities that took place by running a General Activity Report.

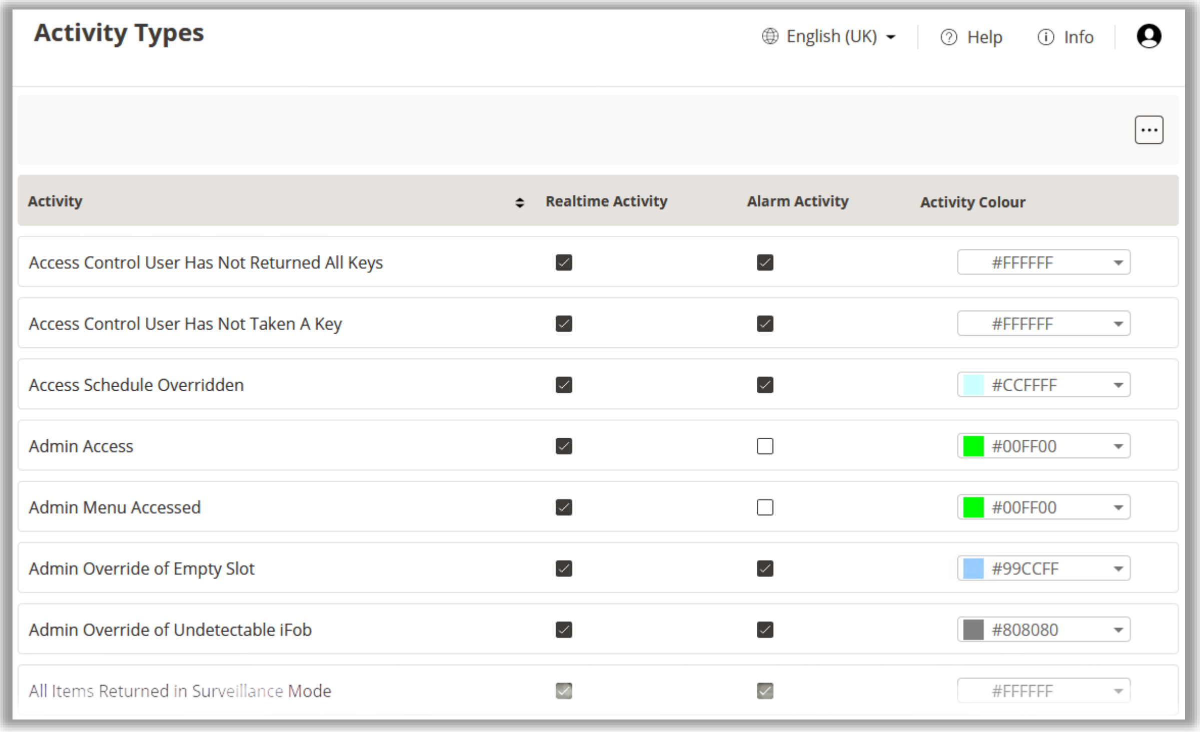
The Ellipsis button allows you to customise the layout of the menu and search the grid for information, add columns to the grid and create, edit and delete layouts. It also gives you the ability to export the Realtime Activity events into either a PDF or an XLS file.



To view the full list of activities, select the Software Settings button from the Navigation Menu and click the **Activity Types** button as shown below.



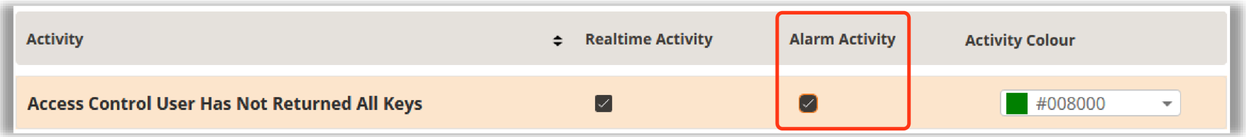
This will display all the activity types that exist within the Traka Touch system.



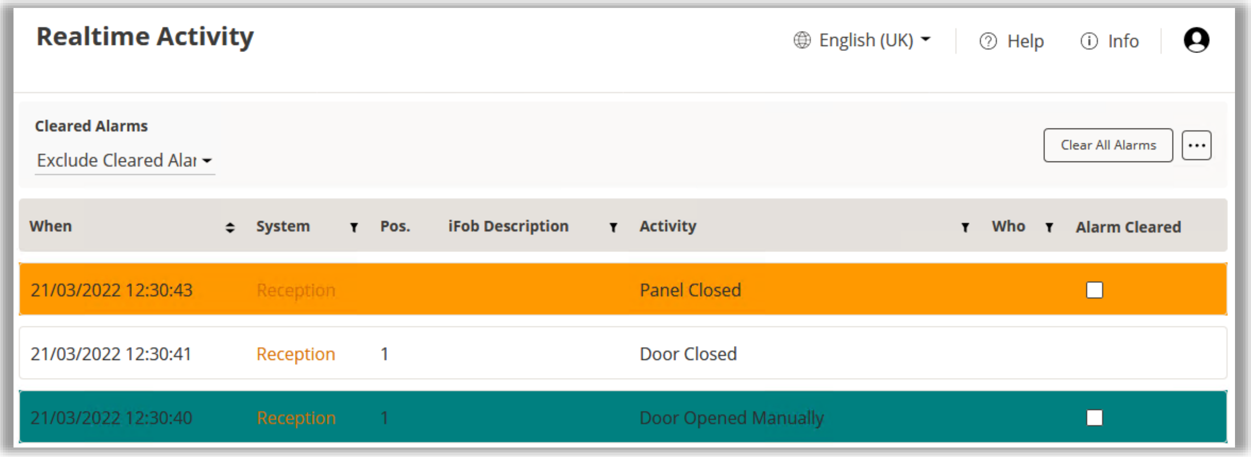
The column to the right of the activity name is the Realtime Activity check box. When ticked, the corresponding activity will appear in the activity grid when triggered at the Traka Touch system.

5.12.1 CREATING ALARMS

Activities can be turned into alarms by checking the Alarm Activity box. This will allow you to assign a colour to the activity via the colour column. Simply select a colour from the drop-down selection box or enter a hexadecimal value of your choice to achieve the exact colour required.

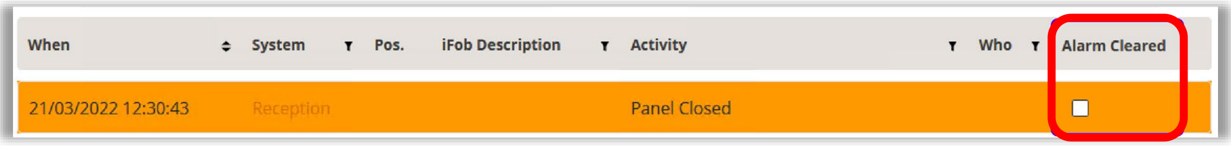


When the activity is triggered at the system, it will appear in the activity grid as an alarm. The alarm will be highlighted with the colour you assigned to it.

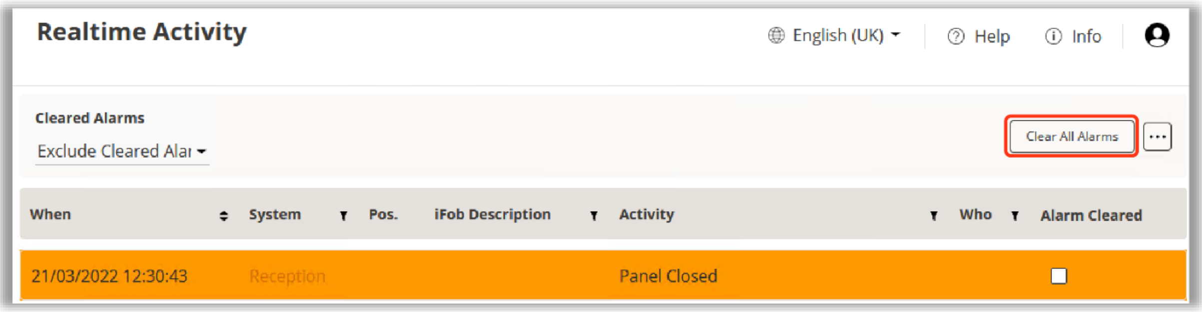


5.12.2 CLEARING ALARMS

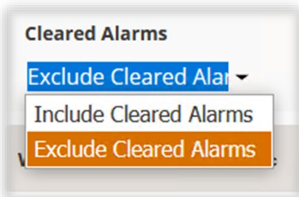
To clear an alarm from the grid, simply click the alarm cleared check box for the relevant alarm.



If you have multiple alarms listed in the grid, you can select the clear all alarms button (shown below) at the top of the table.



At the top of the table on the left-hand side, you can select one of the two available filters which can be applied to the events displayed on screen: Exclude Cleared Alarms or Include Cleared Alarms.



Alarms that have been cleared can be viewed in the Exception Alarms Report.

5.13 AUTHORISER

Authoriser is a standard option within TrakaWEB and Traka Touch. It can be assigned to a User in a situation where an elevated level of security is required. When a User requests a specific Item/iFob from the system, another User with the Authoriser role will also be required to access the system with their ID prior to the Item/iFob being released. Authorisation is applied to items or iFobs and up to three Authorisers may be assigned per Item/iFob.

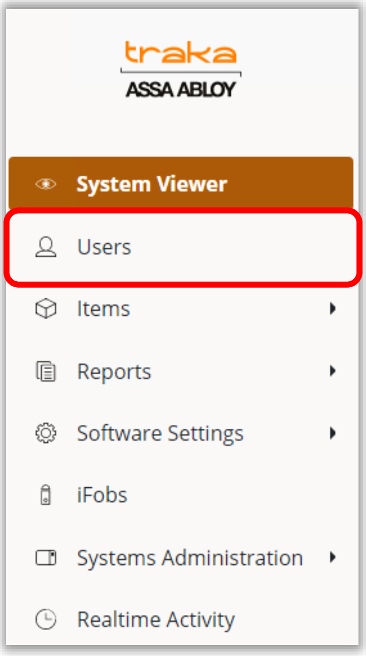
There is also an option whereby a user with the Authoriser role must be in a different User Group to the person requesting the Item/iFob but will not be permitted to remove an item themselves. Whilst setting up a User with the Authoriser role, they can be assigned with an override option. This will enable them to remove specific Items/iFobs without requiring Authorisation for themselves.

NOTE: A system with non-locking receptor strips will release an item without prompting authorisation.

The Authoriser role can also be set up within Traka Touch. For more information on the Traka Touch process for Authorisation, please refer to **UD0011 – Traka Touch User Guide.**

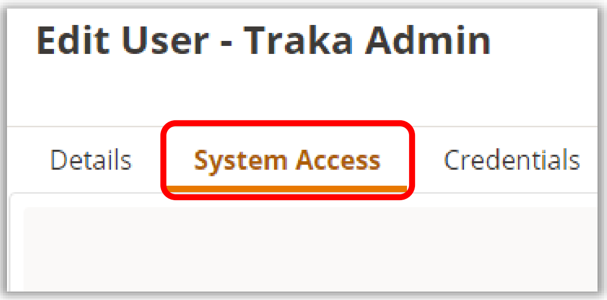
5.13.1 ASSIGNING A USER WITH THE AUTHORISER ROLE

1. Access the Users menu by selecting the Users button from the Navigation Menu.

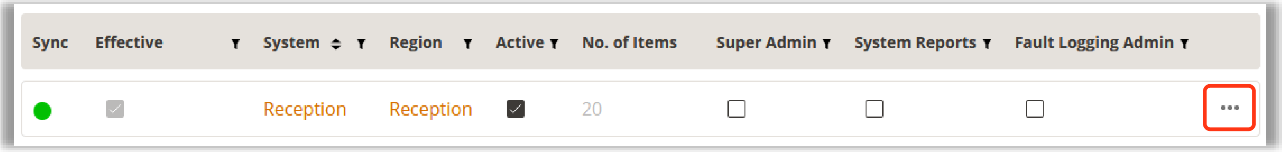


If you already have users set up in your Traka Touch system, then this list will be populated with all those users along with all the other users in the database. If you have not added any users to your system, you will need to Add Users.

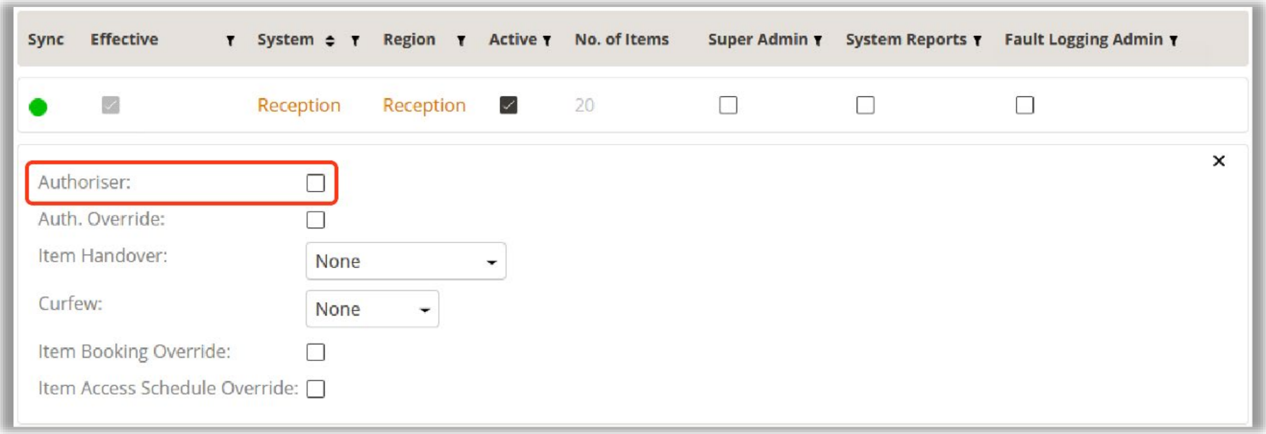
2. Select a User to edit and then navigate to the System Access tab.



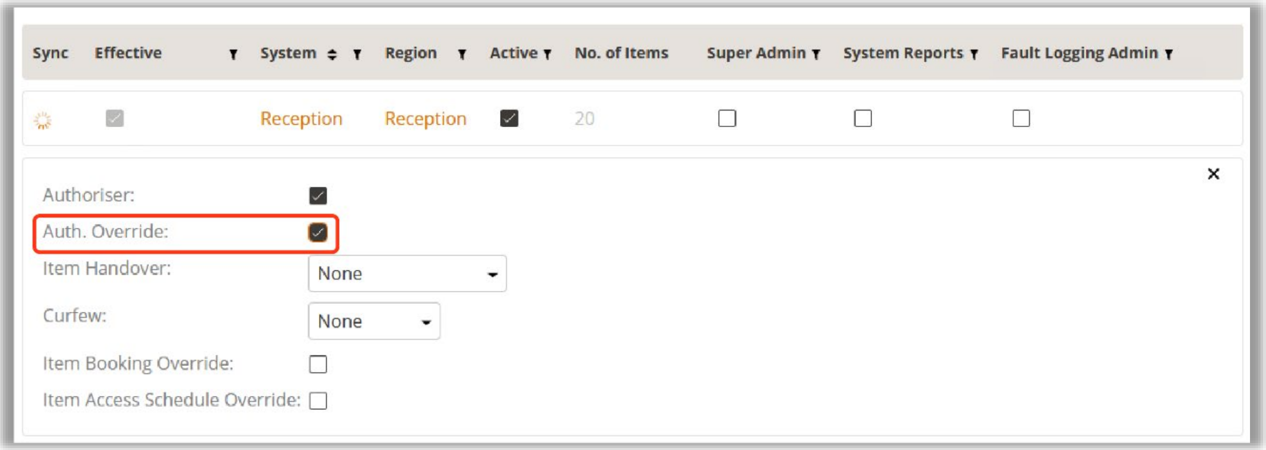
3. From the list at the bottom of the screen, choose the system on which the User will have the Authoriser rights. Click on the Ellipsis symbol appropriate to the system you have chosen.



4. A panel will open. Click in the **Authoriser** check box to assign the selected user as an Authoriser.



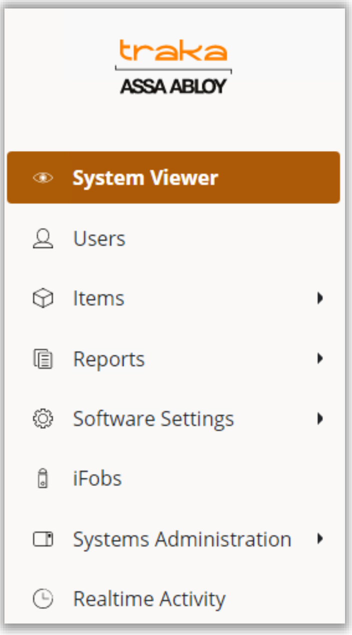
5. If the selected User is also to have the Authoriser Override role, click in the **Auth. Override** check box.



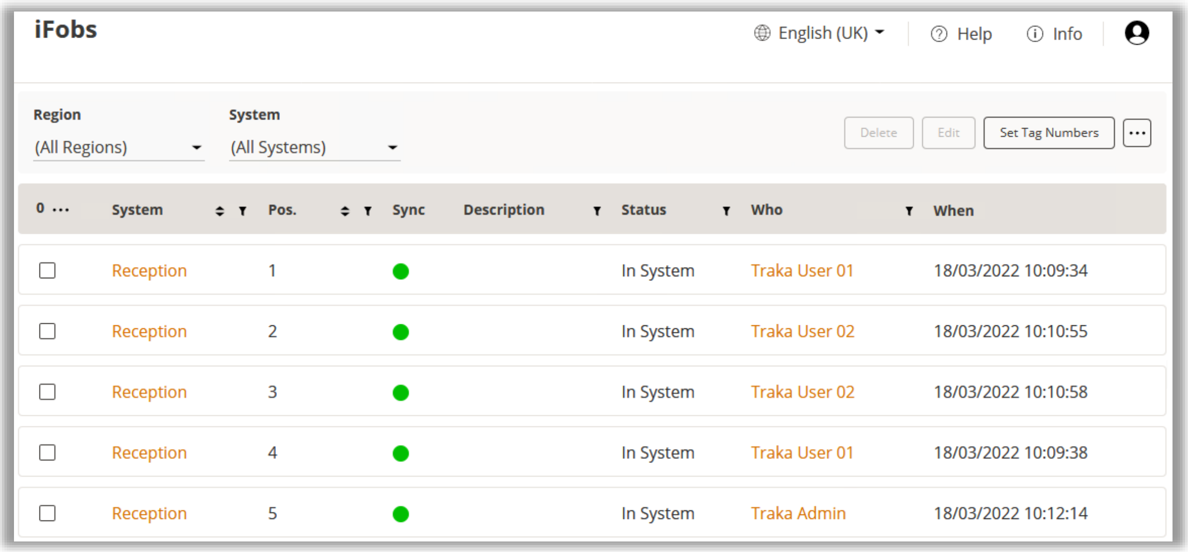
6. Once completed, click **Save and Return**.

5.13.2 SELECTING ITEMS THAT REQUIRE AUTHORISERS

1. Select the iFob menu from the Navigation Menu.

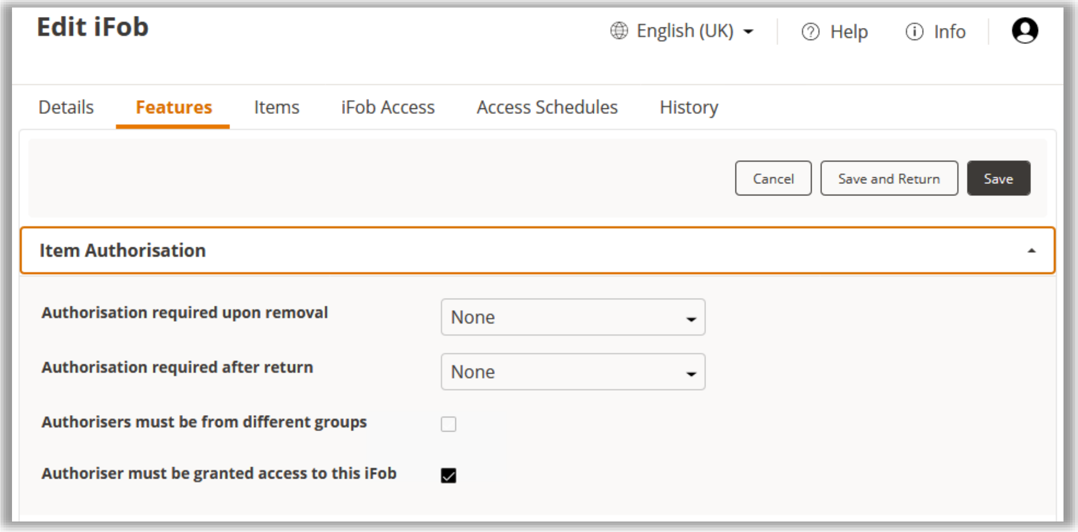


2. Double-click to select an iFob from the list.



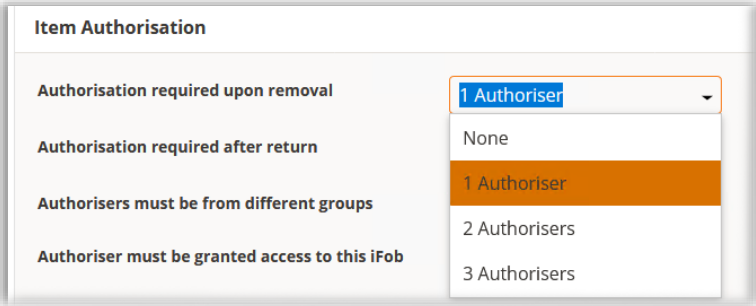
You will now be taken to the Edit iFob Details page.

3. From the Edit iFob Details page, select the **Features** tab and then expand the **Item Authorisation** panel.

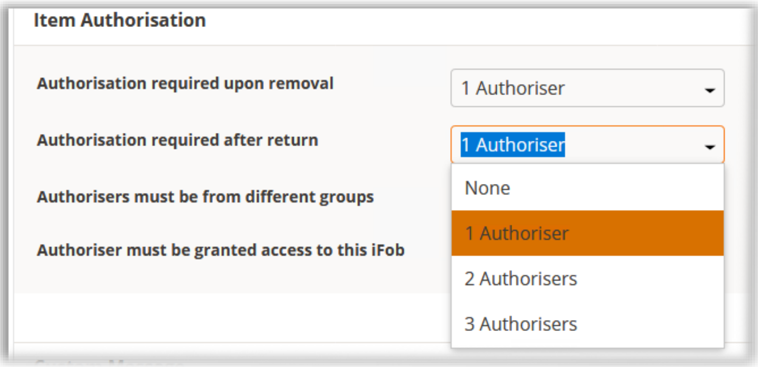


You will notice two drop-down boxes: one for **Authorisation required upon removal** and one for **Authorisation required after return.**

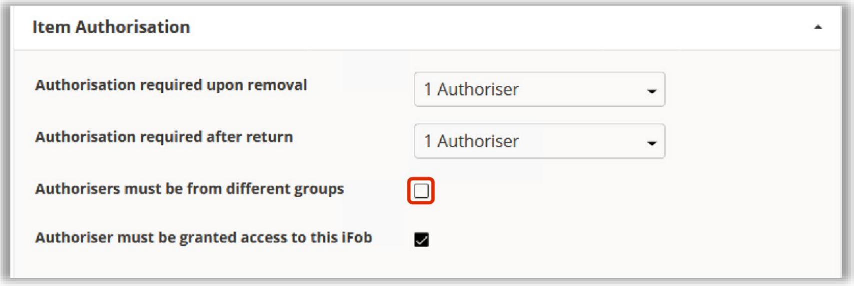
4. Select the **Authorisation required upon removal** drop-down and assign the required number of Authorisers.



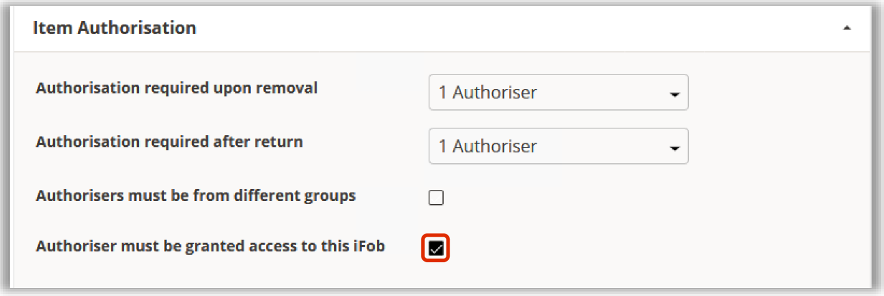
5. Select the **Authorisation required after return** drop-down and assign the required number of Authorisers.



The **Authorisers must be from different groups** checkbox will remain unticked as it only applies to Authorisers from different groups and so is not required for standard Authorisation.



Another check box is also available; **Authoriser must be granted access to this iFob.**

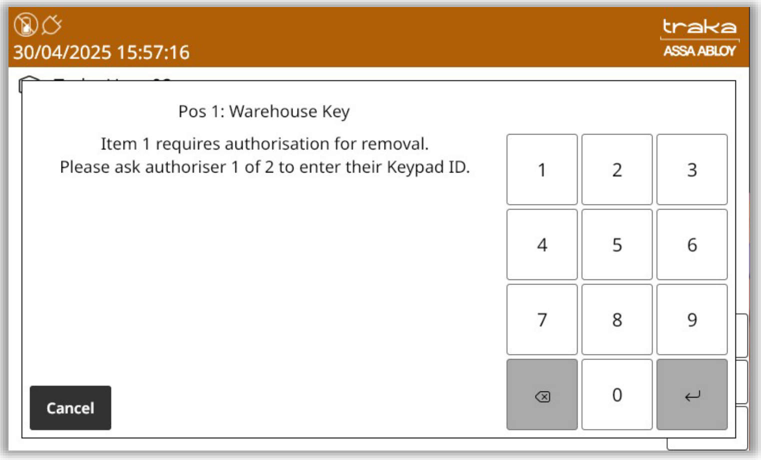


With this check box ticked, Authorisers can only grant authorisation on iFobs that they have access to.

6. Once complete, click on **Save and Return**.

5.13.3 TAKING ITEMS/IFOBS

A user may access the system using their Keypad ID, Credential or Fingerprint to remove an Item. However, if the Item they wish to take requires Authorisation, a message will request that they ask an Authoriser to access the system first.



NOTE: If the user has the Authorization Override enabled, they will be able to remove any Items/iFobs that have been assigned the Authoriser requirement.

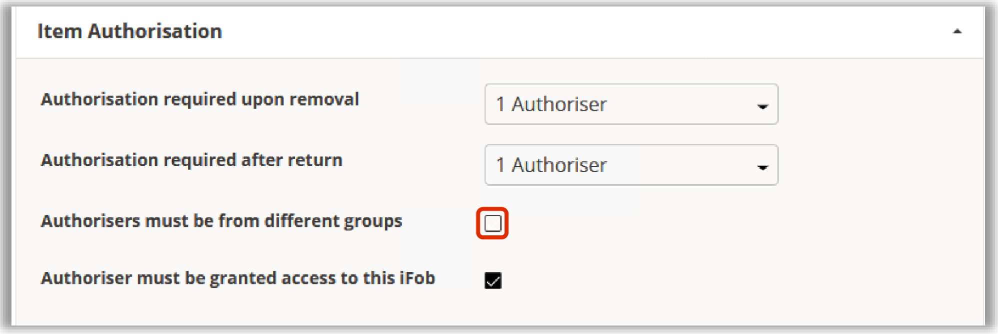
For more information on the Traka Touch procedures for removing Items/iFobs, please refer to **UD0011 – Traka Touch User Guide.**

5.13.4 AUTHORISER FROM A DIFFERENT GROUP ON REMOVAL & RETURN

In certain work environments, particularly Casinos, a rule may be enforced that requires the Authoriser be from another department or 'User Group'.

As TrakaWEB will be required for associating a User to a User Group, this option will not be available for standalone systems.

Clicking a checkbox will enable Authorisers from different groups.



Refer to the section Selecting Items that Require Authorisers in this document if you need to read more on how to get to the menu above.

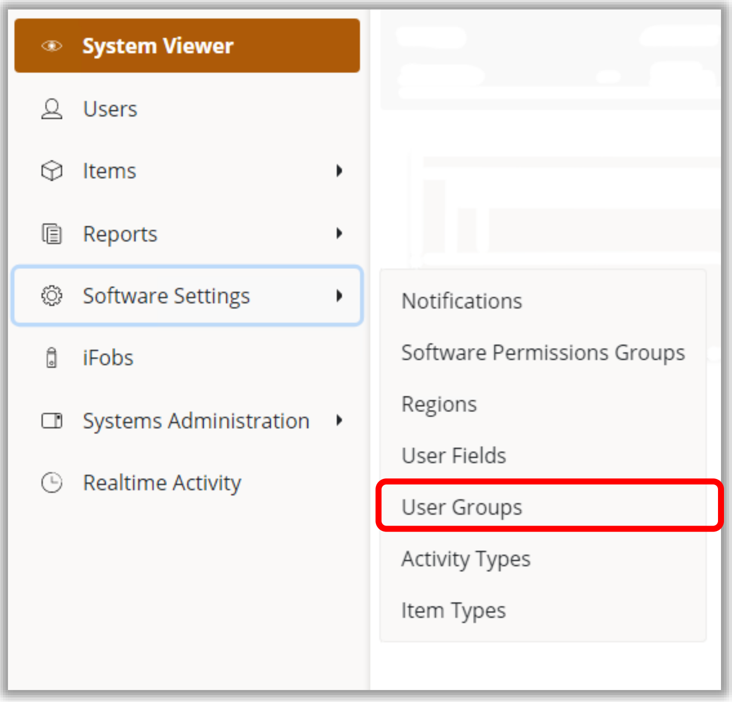
NOTE: This will not be available if the Traka Touch App version does not support this functionality.

NOTE: This option is compatible with FRSS & RRSS Key Cabinets and RFID Locker Systems.

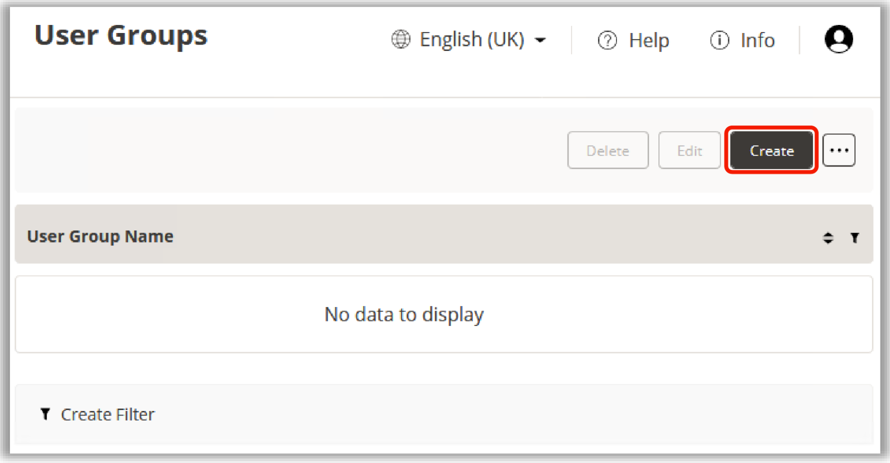
5.13.5 CREATING USER GROUPS

The next stage in the process of enabling an authoriser from a different group is to create a new User Group for users and Authorisers.

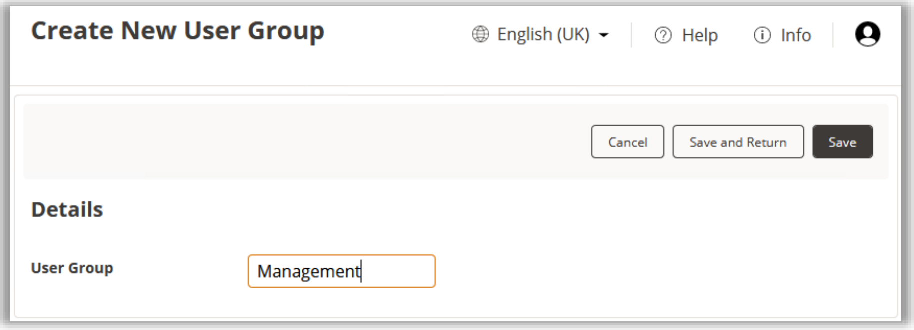
1. From Software Settings in the Navigation Menu, select the User Groups.



2. At the User Groups page, click on the **Create** button to create a new group.

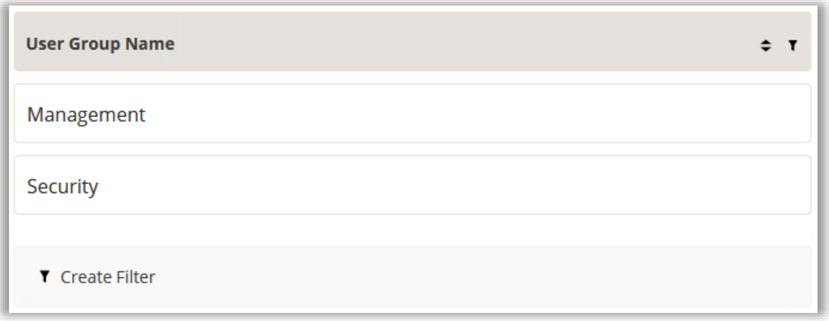


3. At the next page, you will be required to enter a name for the new group.



4. Once completed, click on **Save and Return** and you will see the new group on the User Groups page.

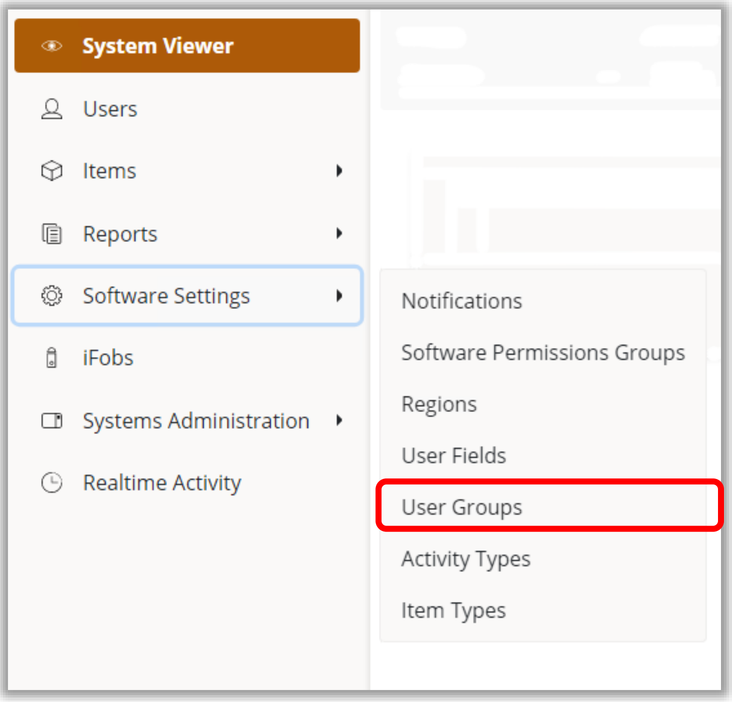
NOTE: You must create at least two groups as depending on how many Authorisers are required, they must each be in a different group to the user requiring the Item/iFob.



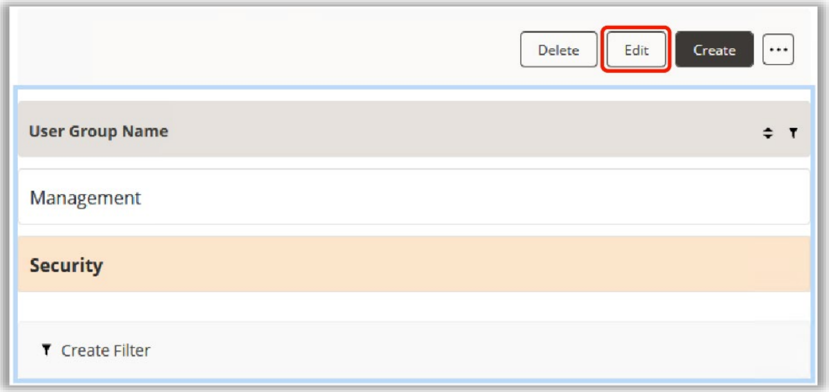
5.13.6 EDITING USER GROUPS

Should you need to change the name of an existing User Group, it can be edited.

1. Select User Groups from Software Settings in the Navigation Menu.



2. Select the group to edit and then click on the **Edit** button.

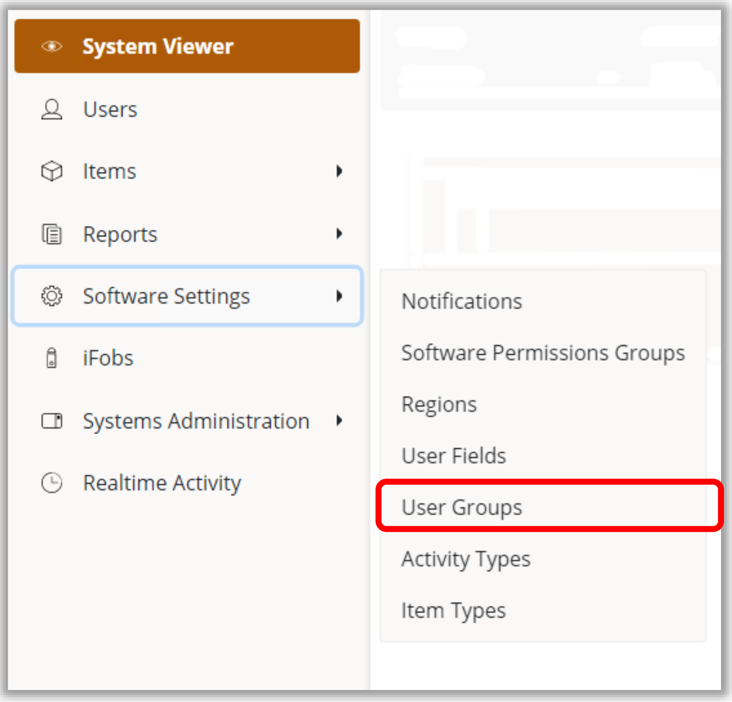


3. Edit the name of the User Group and then click on **Save and Return**.

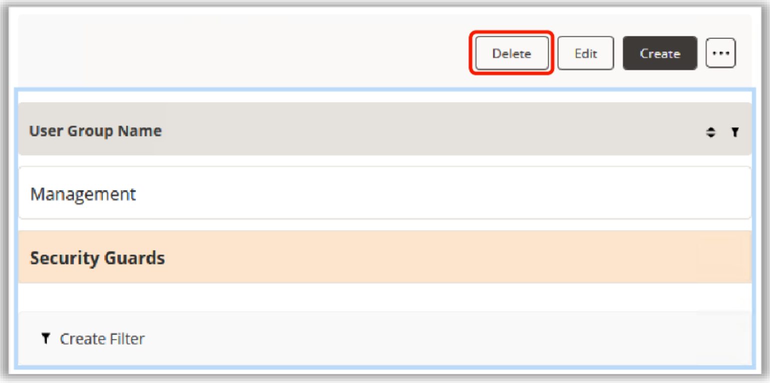
5.13.7 DELETING A USER GROUP

Provided there are no Users assigned to it, the group may be deleted if it is no longer required.

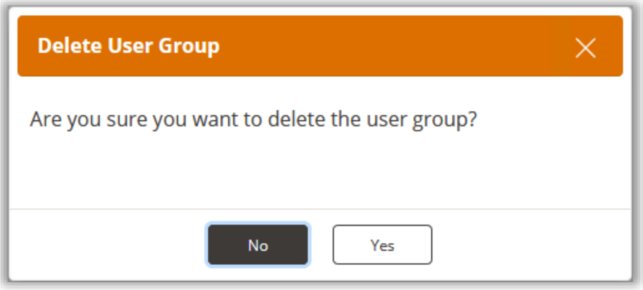
1. Select User Groups from Software Settings in the Navigation Menu.



2. Select the User Group to delete and then click on the **Delete** button.



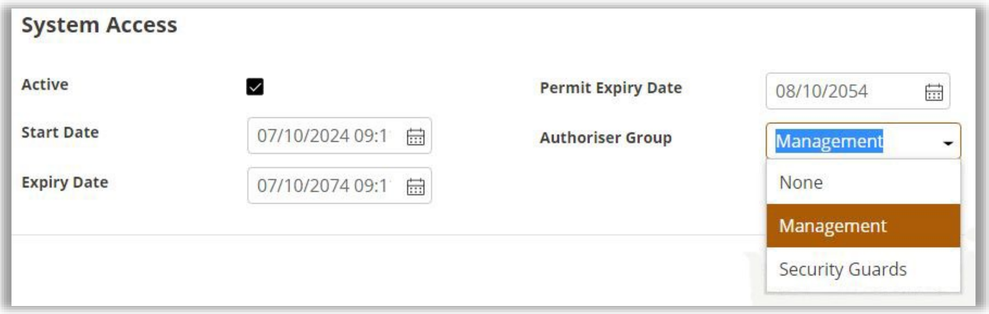
You will then be required to confirm that you wish to delete the selected group. Selecting the **Delete** button will remove it and selecting **No** will return to the list of User Groups.



5.13.8 ASSIGNING USERS TO USER GROUPS

After the required User Groups have been created, you can then assign Users to them. In the following example, two Groups have been created. One group for the User taking the Item/iFob, and a second group for the Authoriser. Selecting **None** will prevent the user from accessing any items that require authorisation.

1. From the Users list, double-click on a User to edit them.
2. From the **System Access** tab, locate the **Authoriser Group** dropdown menu.
3. From the drop-down menu, select a User Group to assign the selected User.



4. Repeat the above process to assign the authoriser to a different User Group.
5. Once completed, click on **Save and Return**.

5.13.9 REMOVING & RETURNING ITEMS

NOTE: The user must be assigned to a User Group or they will not be able to remove or return items that require authorisation.

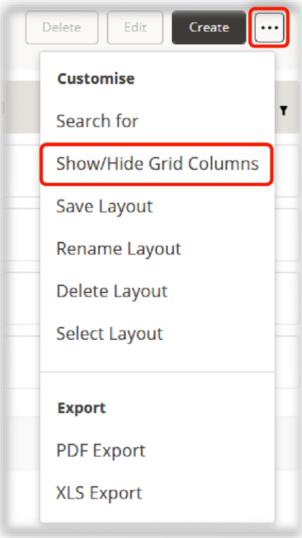
NOTE: The Authoriser must be assigned to a User Group or they will not be able to provide the required assistance to release or return an Item/iFob.

For more information on Using Traka Touch with **Authoriser from a Different Group,** please refer to **UD0011 – Traka Touch User Guide.**

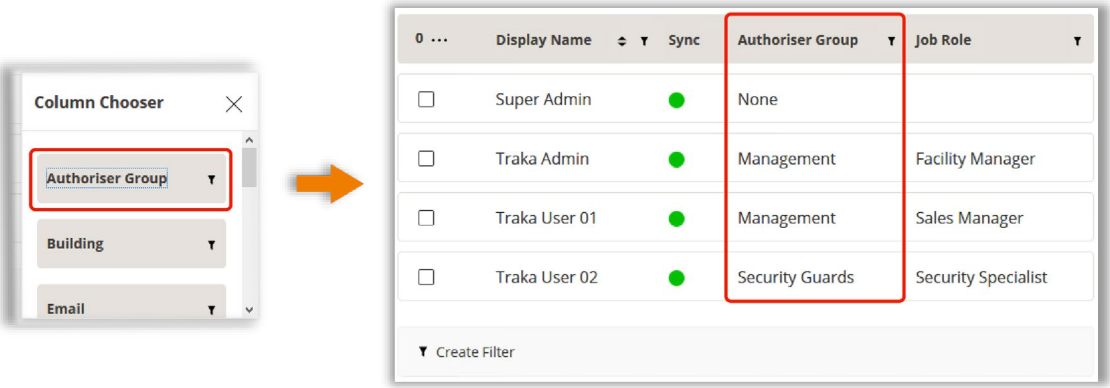
5.13.10AUTHORISER GROUP COLUMN

An additional column may be added to the User page. This will enable you to view which users are in which group. For clarity, this column may also be filtered if there are many users on the system.

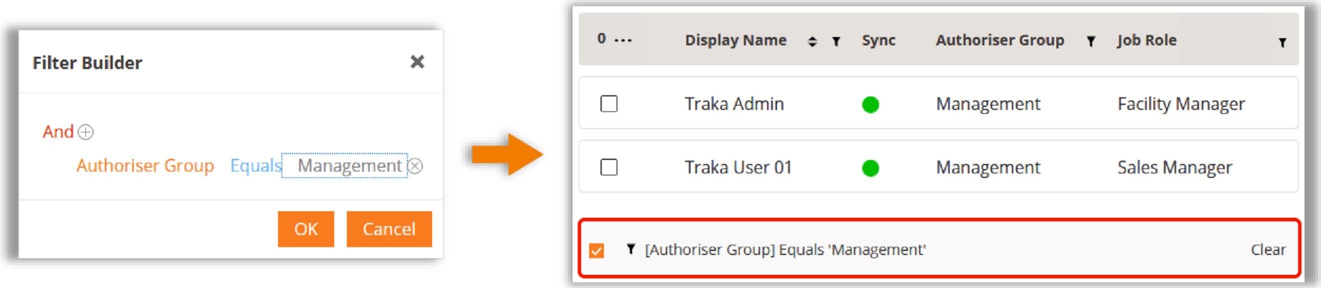
1. Navigate to the Users page, click on the Ellipsis symbol, and select **Show/Hide Grid Columns** from the ribbon toolbar.



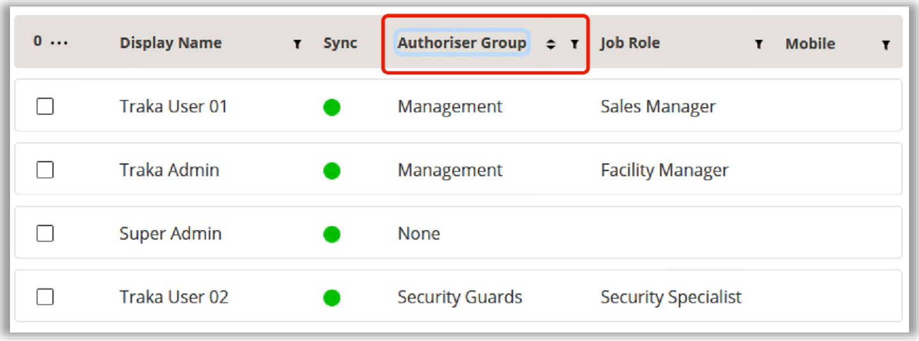
2. From the Column Chooser, click and drag the **Authoriser Group** option to a position on the grid.



The **Authoriser Group Column** will display all the available User Groups and the users that are associated with them. Using the **Create Filter** option at the bottom of the User list, it is possible to filter which users are associated with individual User Groups.



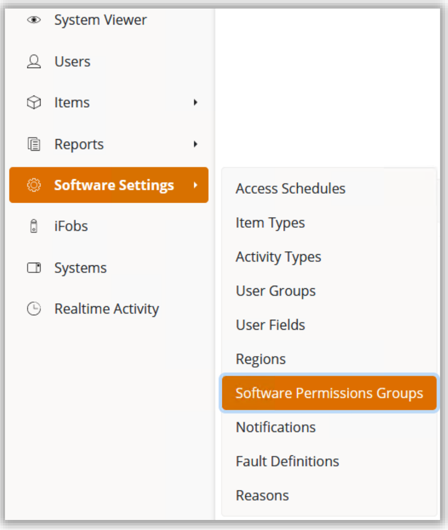
By clicking on the respective column headers, the user groups may also be grouped. This way, you can expand the group list and view the user details for the Authoriser Group.



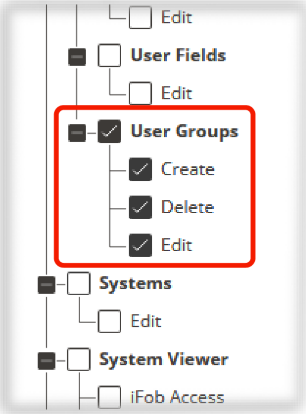
5.13.11SOFTWARE PERMISSIONS

A Software Permissions category is provided within Software Permission Groups with Create, Edit and Delete permissions.

1. From Software Settings in the Navigation Menu, select the **Software Permissions Groups** icon.



2. From within the Software Settings tree, locate User Groups. From here, you can allocate the Create, Delete and Edit permissions.



3. Once completed, click on **Save and Return**.

5.13.12AUDITING

A user with the User Groups Edit permission enabled will be able to access the History tab. Here, an audit trail for the User Group's history and Item Access Group history is visible and any changes made, such as additions, updates or deletions may be viewed.

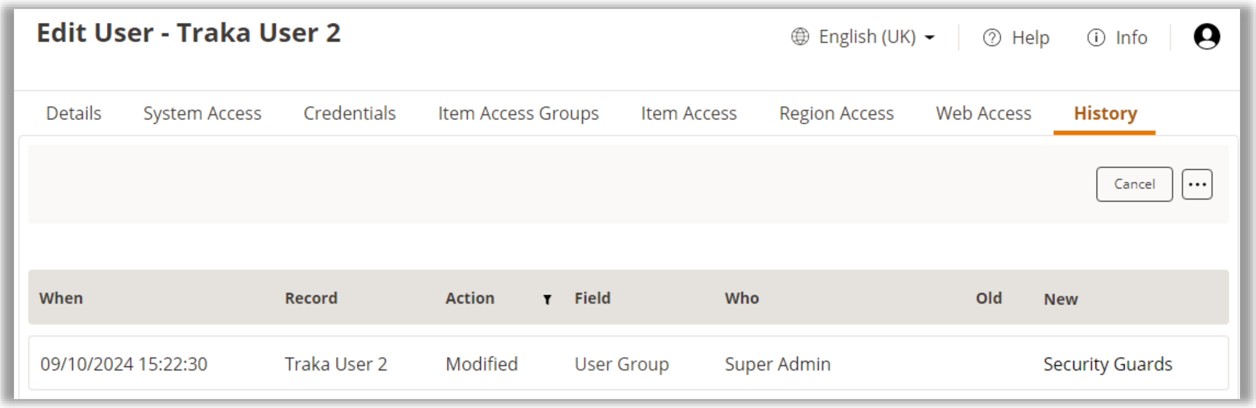
User

To access the audit data for users:

1. Navigate to the Users Page.
2. Double click on the required user.

You will now be taken to the Edit User page for that user.

3. Click on the History tab.

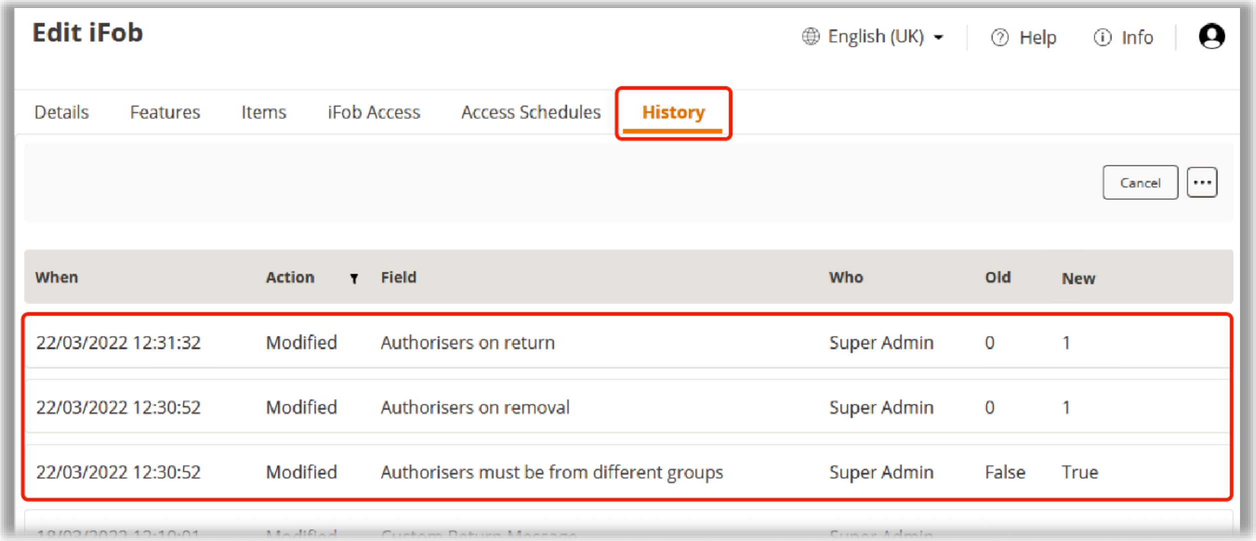


The history page will display the audit information for that user as shown in the example below.

The **Old Value** and **New Value** columns show any changes that have occurred such as a user being moved out of an existing group (Old Value) and into another (New Value).

iFobs

iFob information regarding the Authorisers can be accessed via individual iFob records:



5.14 CURFEWS

Curfews are a non-cost option built into TrakaWEB and Traka Touch and are used to reduce the amount of time an item is out of the system, or how long a user can have an item in their possession. There are two different types of curfews, Relative & Absolute. You can set these curfews against both users and items. This is a very useful feature within businesses that have shift patterns and users taking many items from various systems, as it will highlight if items are not returned to the system by the end of a user's shift.

NOTE: For more information regarding Curfews and Traka Touch, refer to UD0011 – Traka Touch User Guide.

NOTE: If the System Lock Out feature has been enabled, Traka Touch allows a 5-minute grace period for items under curfew to be returned. After this 5-minute grace period, items under curfew will be recorded as 'overdue'. For further information, please refer to UD0258- Traka Touch Pro User Guide.

Status Icons & Activity

Any items out under curfew or overdue will be shown on the system viewer and will be kept up to date as often as TrakaWEB communicates with the Traka Touch system(s).

 - When this icon is displayed, the item is currently out under a curfew.

 - When this icon is displayed, the item is out under a curfew and is overdue.

You will also see an activity generated on overdue items in the Activity Grid.

Curfew Types

Absolute

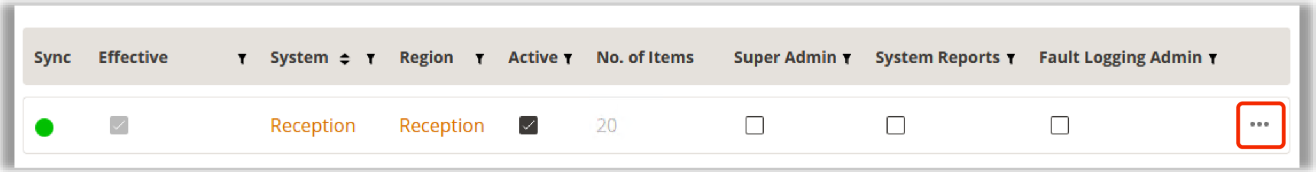
This curfew allows you to set a time by which all the users' items should be returned. For example, if you set the curfew to 17:30, all items taken by the user before this time will become overdue if not returned by 17:30.

Relative

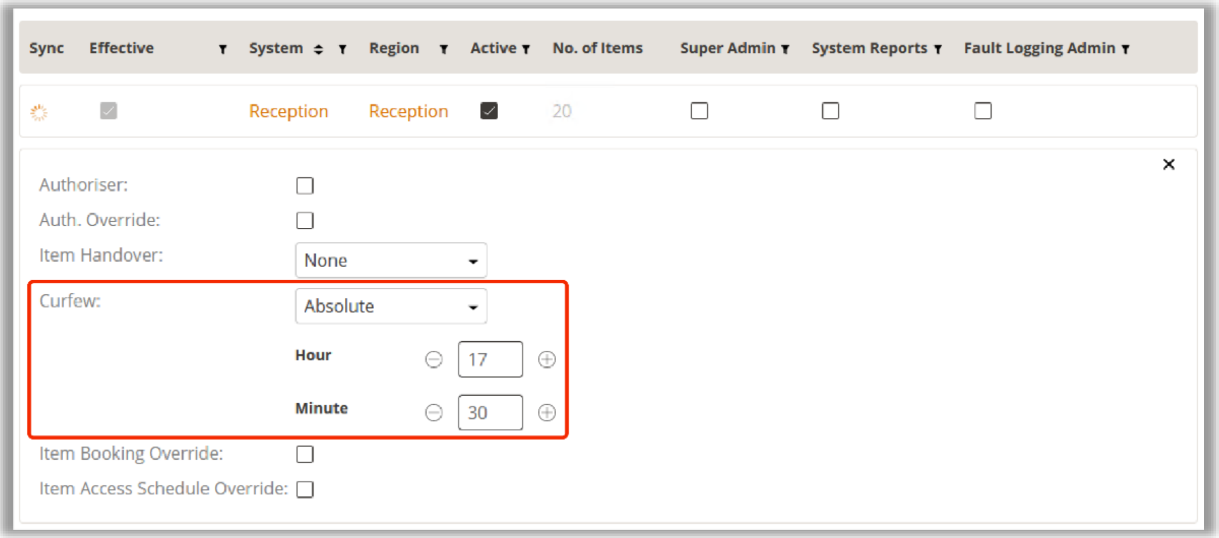
This curfew allows you to set a length of time for which all the users' items may be out of the system. This time limit is set in multiples of Days, Hours and Minutes to a maximum of 365 days, 23 hours and 59 minutes. Thus, if you expect the item to be returned within 1 hour, you should complete the curfew accordingly. If the item is not returned within 1 hour, an activity will be generated and displayed in the Activity Grid.

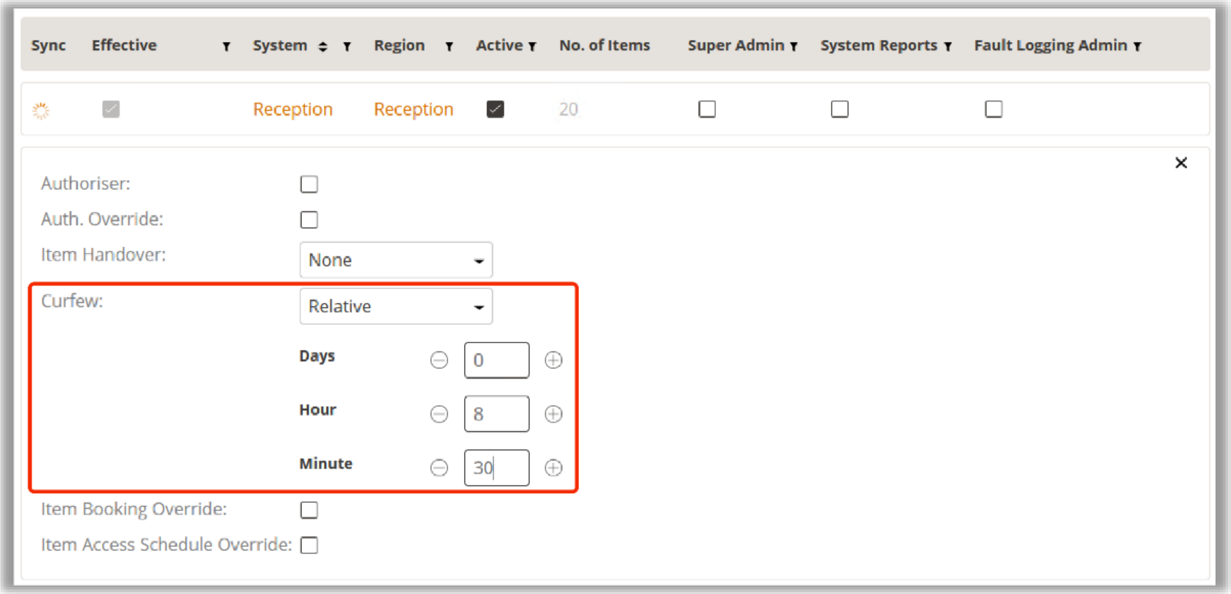
Setting up a User Curfew

1. To set a user curfew, highlight the desired user from the user list and select the **Edit** button.
2. Select the System Access tab. Select the system on which the curfew will be applied to your chosen user. To the right of that system record, you will find the Ellipsis icon. Click on that icon to open this system panel.



3. The panel contains a field named Curfew. Using the drop-down box, select the type of curfew required against the system you wish the curfew to apply and the time or number of days, hours and minutes (depending on the curfew type).





4. Once you have completed the curfew, select one of the **Save** options at the top of the window.

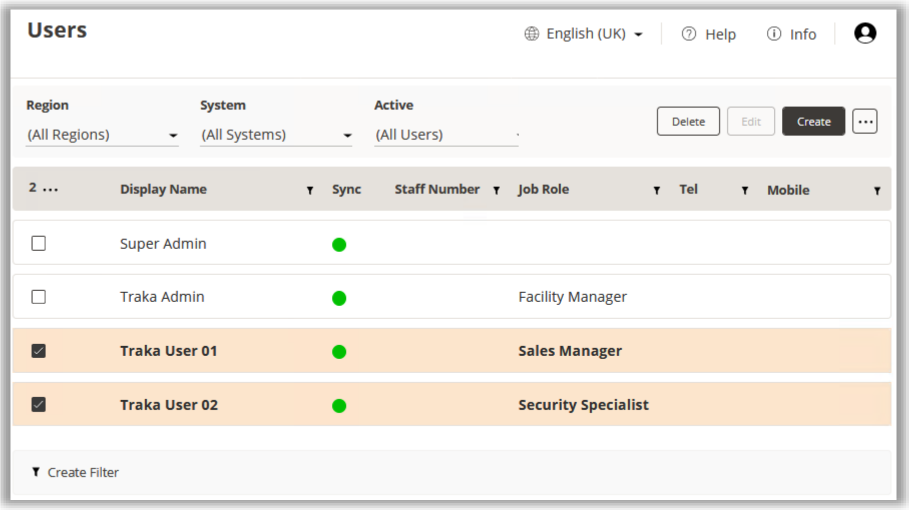
5.14.1.1 MULTI-SELECT/MULTI-EDIT (MSME)

To read more about the Multi-Select/Multi-Edit (MSME) functionality, refer to the relevant section in this guide. This section only discusses the specific application of MSME to User Curfews.

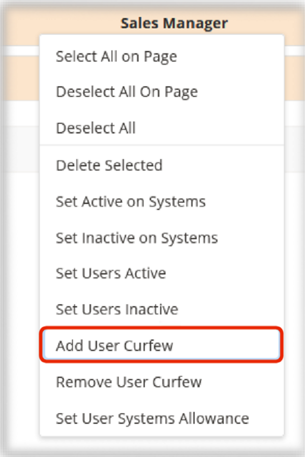
Add User Curfews

The Add User Curfew option will enable you to apply either a relative or absolute curfew to a user and select the region and system on which the user is active.

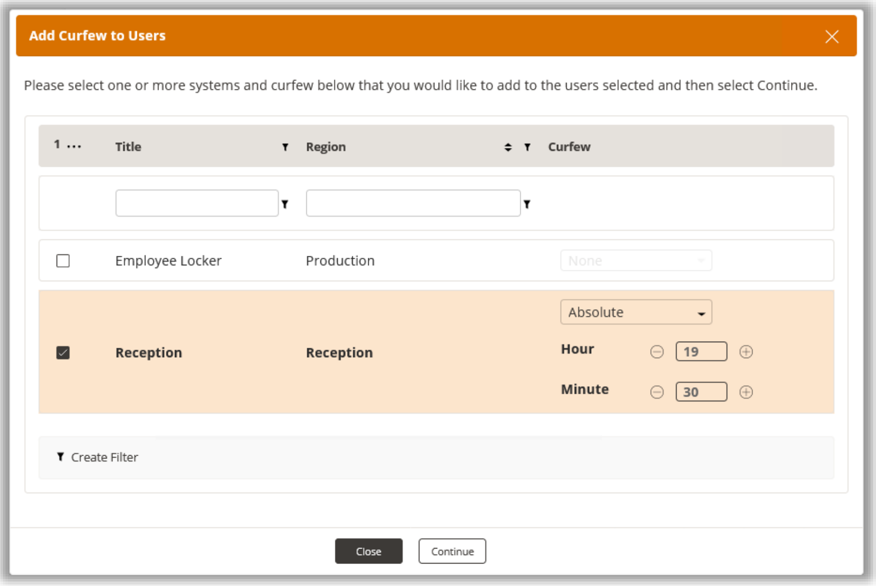
1. Select the user or users to which you wish to apply the curfew.



2. Right click and select **Add User Curfew** from the context menu.



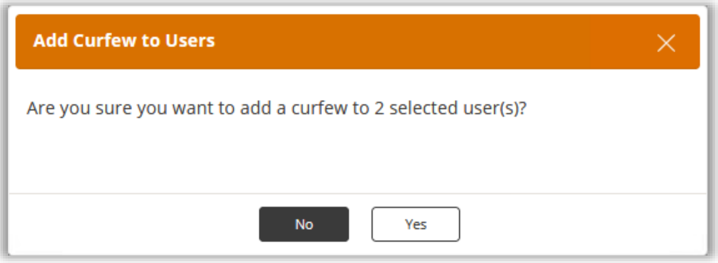
3. A window will now appear. You can now select the system, the region, and the type of curfew that you wish to apply.



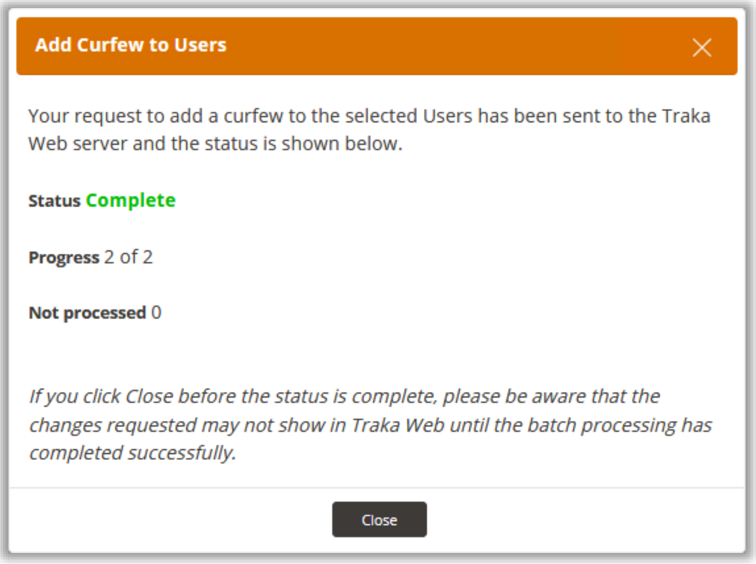
4. Once you completed the selection, click on **Continue.**

A message will be displayed requesting confirmation that you wish to add the curfew. Selecting **No** will close the message, and you will return to the Users page.

5. Select **Yes** to begin the process.



A window will appear displaying the status of the process. Once completed, click on **Close.** If successful, the curfew will be added to the selected users.

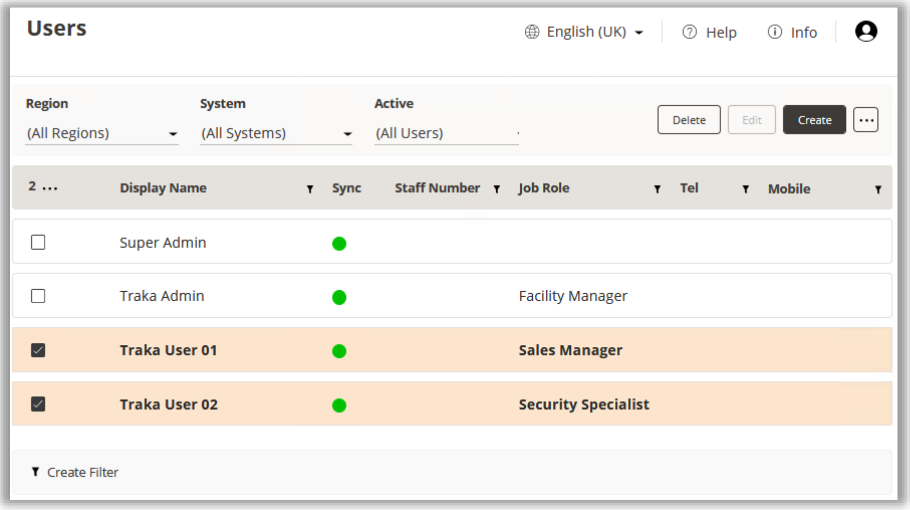


NOTE: Clicking on Close before the status is complete will not cancel the operation. The batch process will continue to run, and any changes will not be displayed until the process has completed.

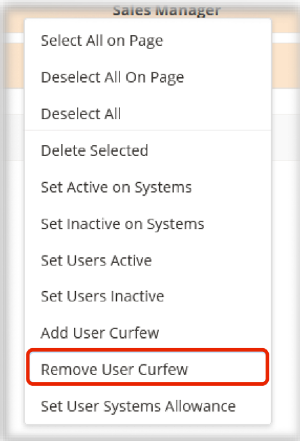
Remove User Curfew

The **Remove User Curfew** will enable you to remove an absolute or relative curfew that has been applied to one or more users.

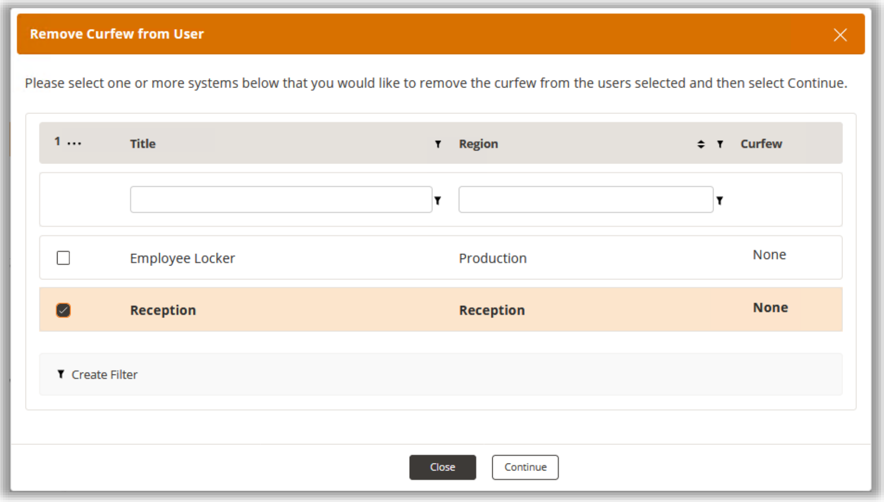
1. Select the user or users whom you wish to remove a curfew.



2. Right click and select **Remove User Curfew** from the context menu.



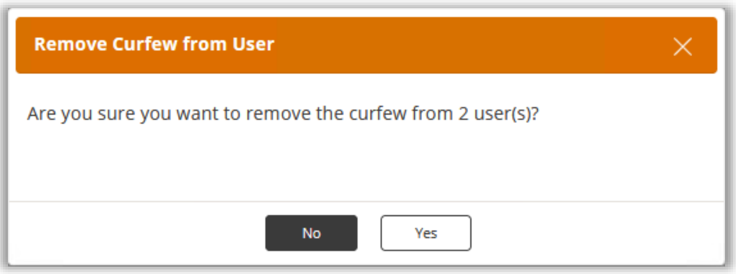
A window will now appear. You can now select the system of the region for the curfew that you wish to remove.



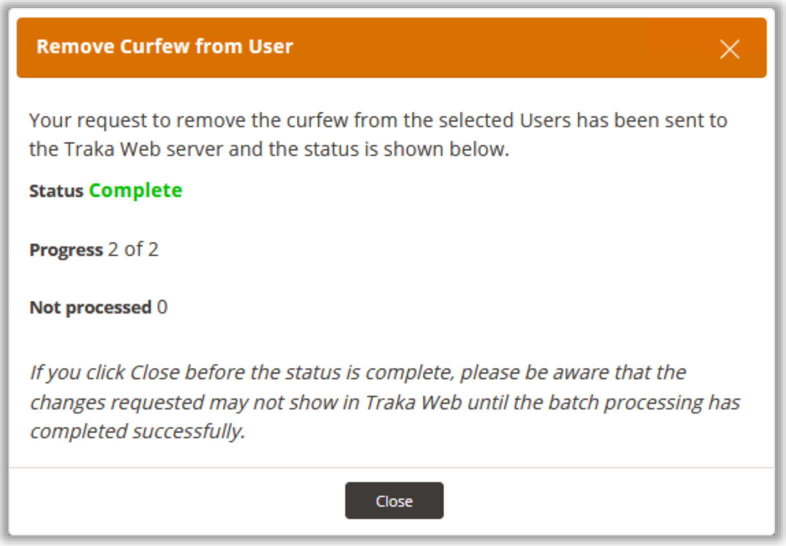
3. Select **Continue** to progress with the curfew removal.

A window will appear requesting confirmation that you wish to remove the curfew from the users.

4. Select **Yes** to begin the process.



A window will appear displaying the status of the process. Once completed, click on **Close.** If successful, the curfew will be removed from the selected users.



5.14.2 IFOB CURFEWS

Curfew Types

Absolute

This curfew allows you to set a time by which an item should be returned. For example, if you set the curfew to 17:30, the item will become overdue if not returned by 17:30. If the item is removed after 17:30 it must be returned by 17:30 the following day.

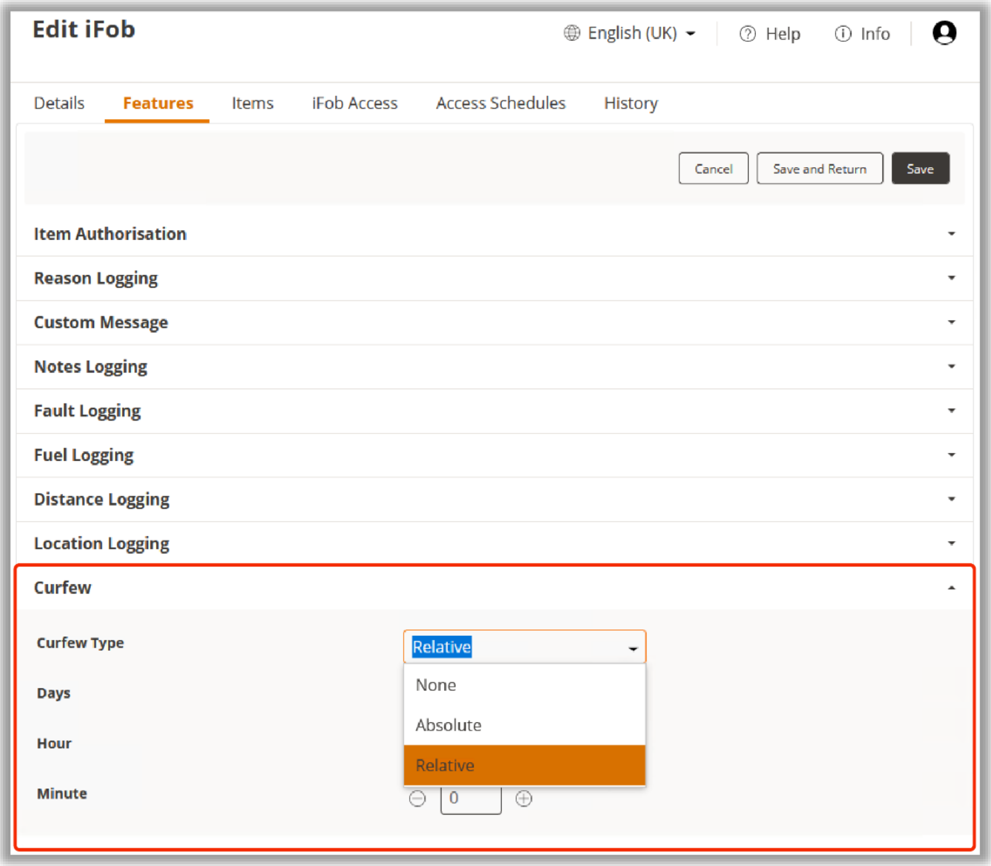
Relative

This curfew allows you to set a length of time for which an item may be out of the system. This time limit is set in multiples of Days, Hours, and Minutes to a maximum of 365 days, 23 hours and 59 minutes.

Setting up an iFob Curfew

NOTE: If your system is an RFID Locker System, it will not contain iFobs. However, this section will still be relevant and the term 'iFob' will be referring to the 'RFID Tag' attached to the asset inside a Locker Compartment.

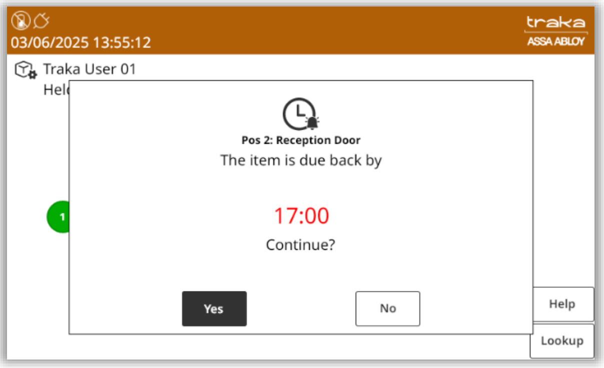
1. To set an iFob curfew, highlight the desired position from the System Viewer and select the edit iFob button. Alternatively, you can select the iFob icon from the Navigation Menu, then from the iFob list highlight the desired iFob and select the edit iFob button.
2. The iFob Details page will then appear. Navigate to the Features tab.
3. At the bottom of the window, you will notice the **Curfew** field. From the drop-down box, select which type of curfew you wish to set e.g. Absolute or Relative, then set the desired time or number of days, hours and minutes (depending on the curfew type).



4. Once you have completed the curfew, select one of the **Save** options at the top of the window.

5.14.3 ITEM REMOVAL UNDER CURFEW

1. When a user accesses the Traka Touch System and attempts to remove an item, they will be presented with a message similar the following.



2. Clicking **Yes** will release the item.

NOTE: By selecting 'Yes', the user accepts that the item must be back in the system by the time stated in the message.

3. Remove the item from the system.

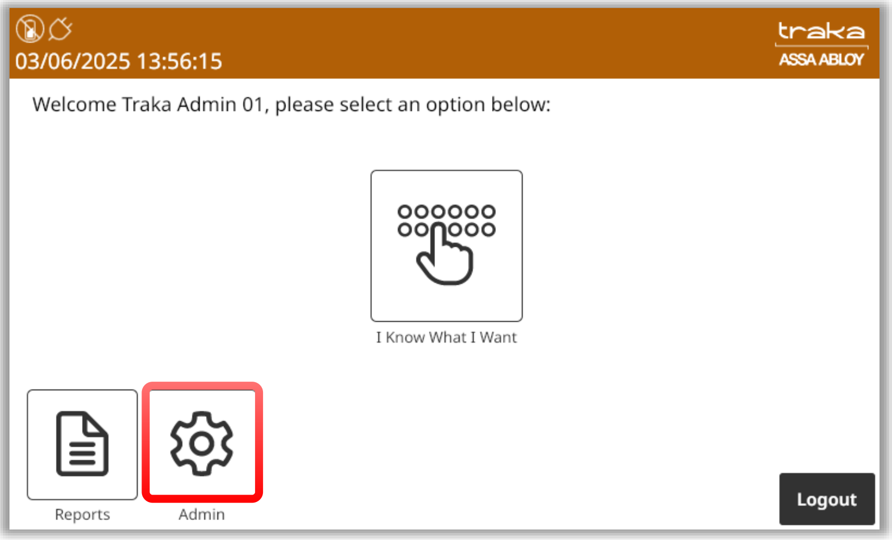
The item is now under curfew and will become overdue if it is not returned to the system by the stated time.

5.14.4 SETTING UP CURFEWS IN TRAKA TOUCH

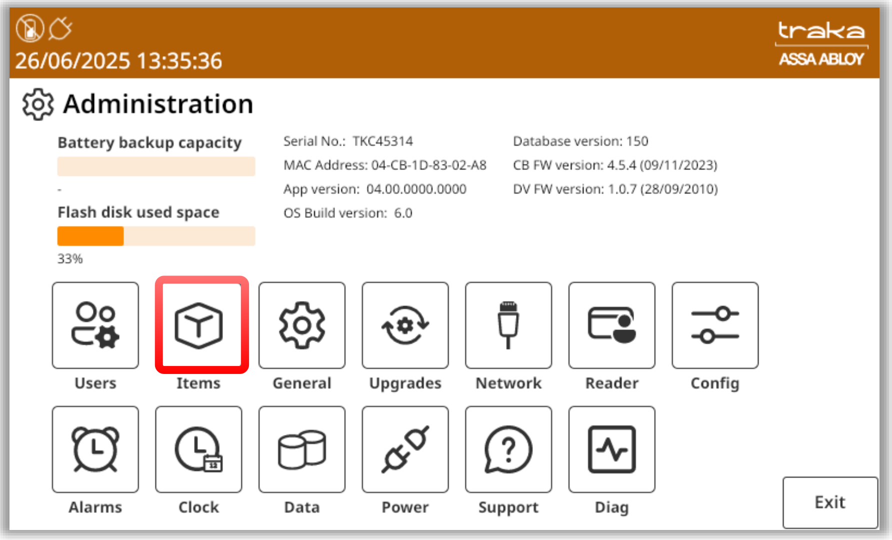
The functionality of TrakaWEB Curfews can also be applied to the Traka Touch System. As with 'Absolute' and 'Relative' Curfews, a specific time or a set number of days, hours and minutes can be applied. These can also be applied to both 'Items' and 'Users'.

Setting up an Item Curfew

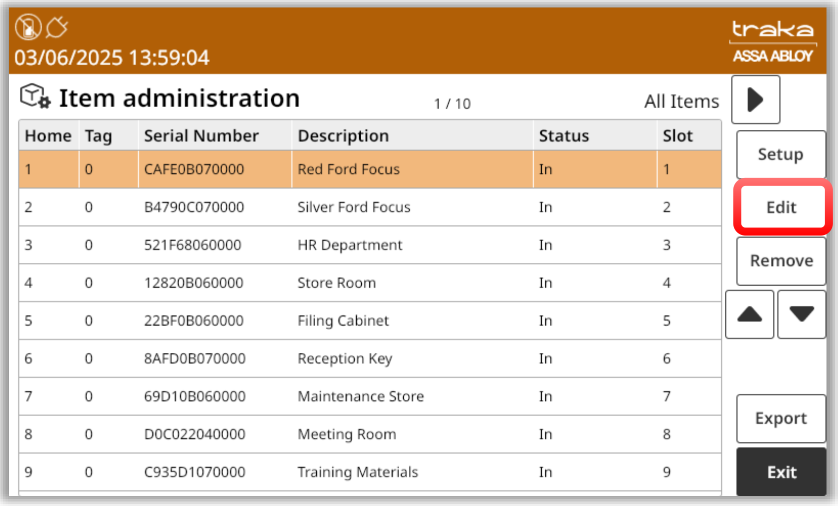
1. Access the Traka Touch System and click on **Admin**.



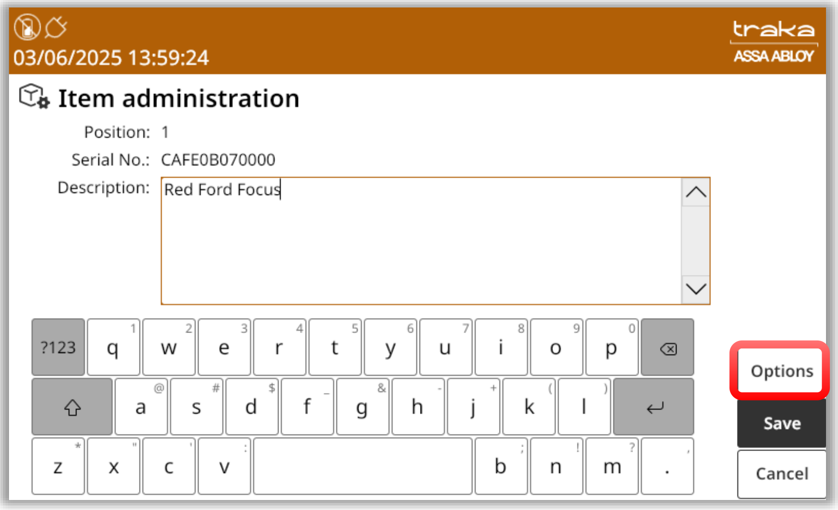
2. You will now be taken to the 'Administration' screen. Click on **Items**.



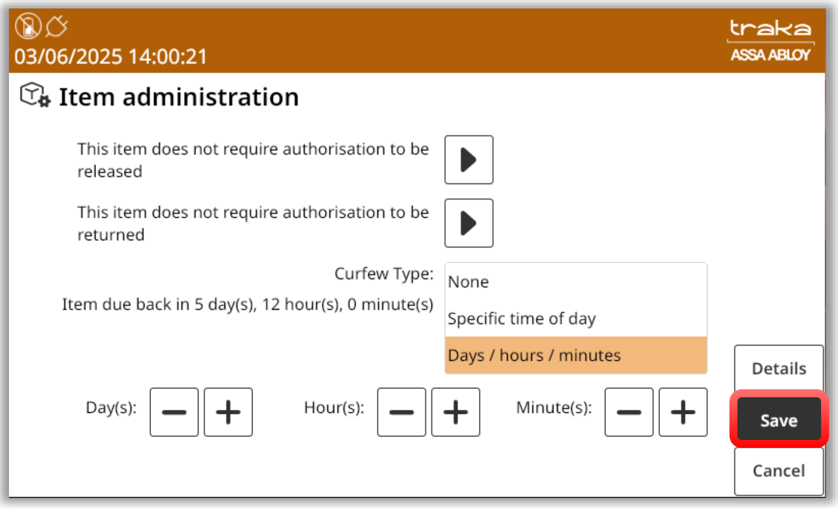
3. Select the item you wish to apply the Curfew against and then click on **Edit**.



4. The next screen allows you to change the description of the Item if required. Click on **Options** to continue.

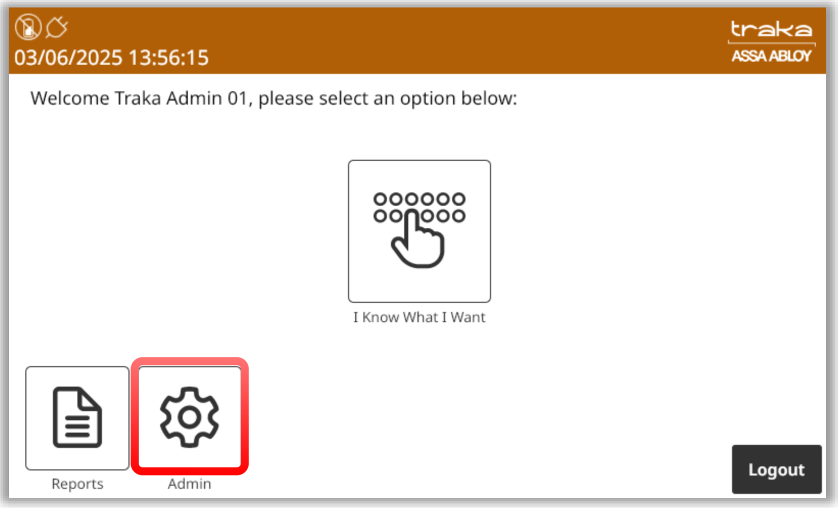


At the next screen, you will be presented with the option for 'Specific time of day' and 'Number of days, hours and minutes'. The buttons immediately below will enable you cycle up and down through the units corresponding to Days, Hours and Minutes. Once you have set the Curfew, click **Save**.

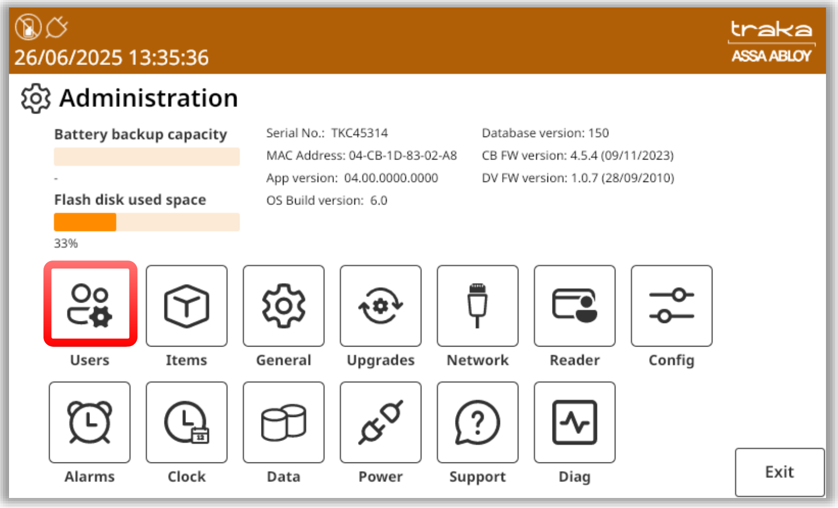


Setting up a User Curfew

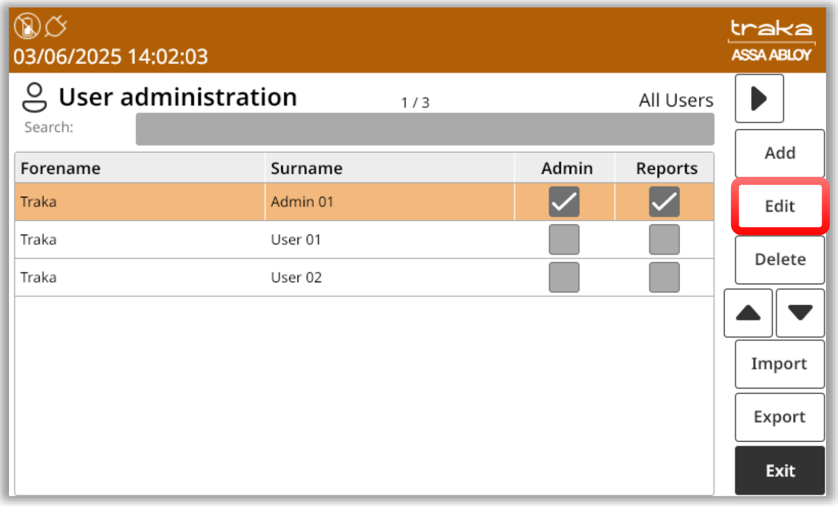
1. Access the Traka Touch System and click on **Admin**.



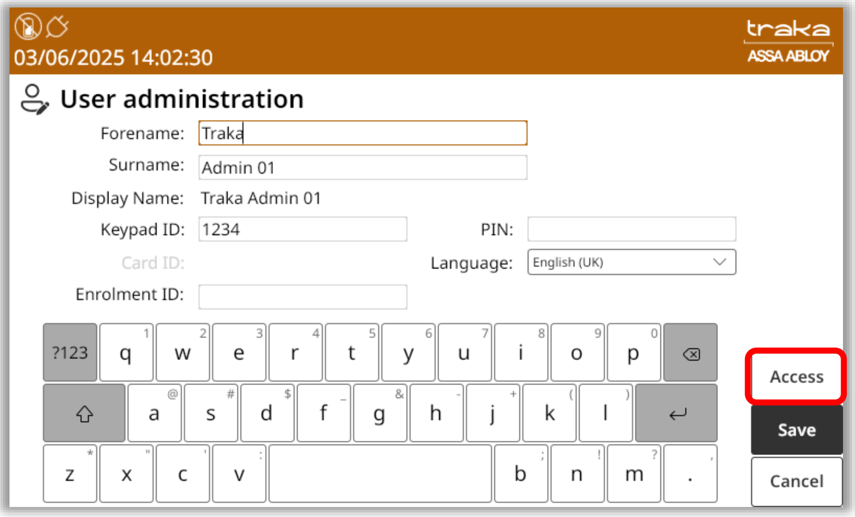
2. You will now be taken to the 'Administration' screen. Click on **Users**.



3. Select the User you wish to apply the Curfew against and click **Edit**.

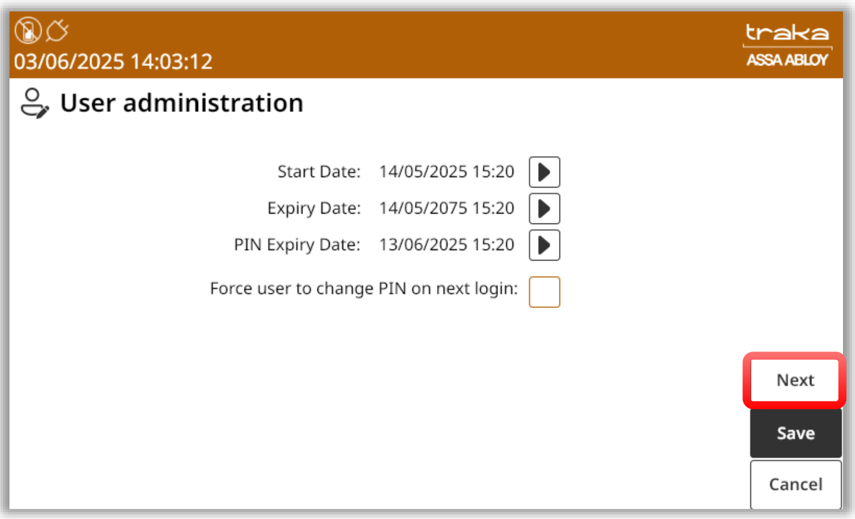


4. The next screen will allow you to edit details about the User if required. Click on the **Access** button.

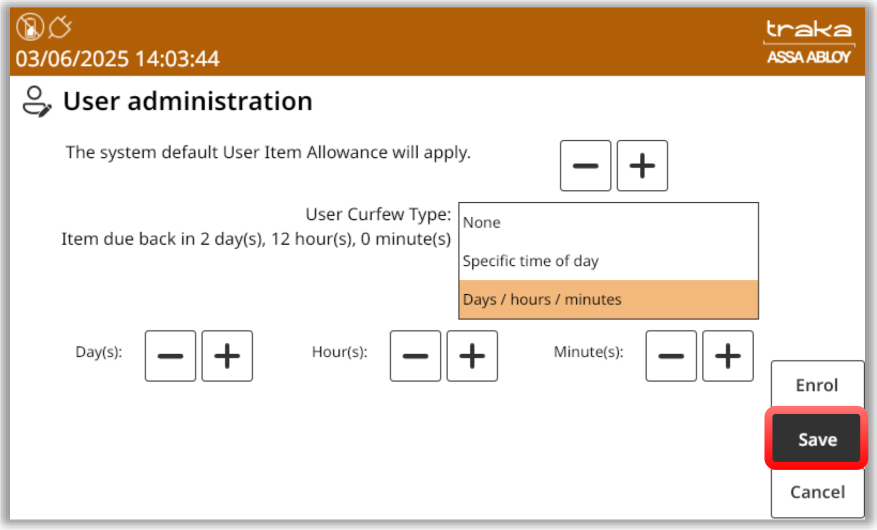


5. You will now be taken to the 'User Administration' screen. Click the **Options** button to continue.

6. You will now be taken to the next 'User Administration' screen. Click on the **Next** button.



7. At the next screen, you will be presented with the option for 'Specific time of day' and 'Number of days, hours and minutes'. The buttons immediately below will enable you to cycle up and down through the units corresponding to Days, Hours and Minutes. Once you have set the Curfew, click on **Save**.



5.15 EMERGENCY OPEN

The Emergency Open option will be a standard feature on all Traka Touch Locker systems using Traka Touch v2.3 and above with TrakaWEB v3.3 and above. It will allow a user with the option enabled on their profile to open all the doors on a Locker system. This will be achieved in sequential order and as quickly as possible by simply pressing the **Emergency** icon- on the Traka Touch screen.

The option can be enabled on a user-by-user basis. The Emergency Open option will open all doors regardless of the users' assigned access rights or any access schedules that may have been allocated to the user and/or item.

Any other cost options such as Notes Logging or Reason Logging will be overridden and will not be displayed. Curfew functionality will remain, but no prompts will be made available.

If your system is a stand-alone configuration i.e., it is not connected to TrakaWEB, the option to grant or revoke the Emergency Open permission to a User may be carried out in Traka Touch. For more information, please refer to **UD0090 – Traka Touch Lockers User Guide.**

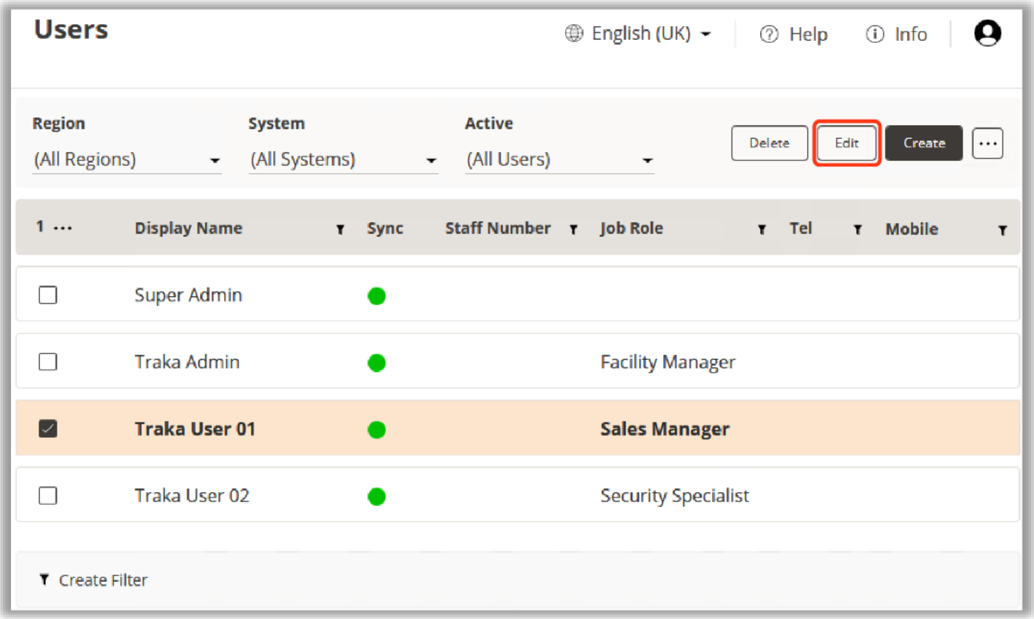
Should the Emergency Open option be activated or deactivated at any time, an event will be recorded to show any activity. These events may also have alarm relays programmed against them or the event may be used to trigger an email notification.

Whilst the Emergency Open option is activated and 1 or more doors remain open, the configured auto-logout timeout will not apply. All the doors must be closed before the user is logged out.

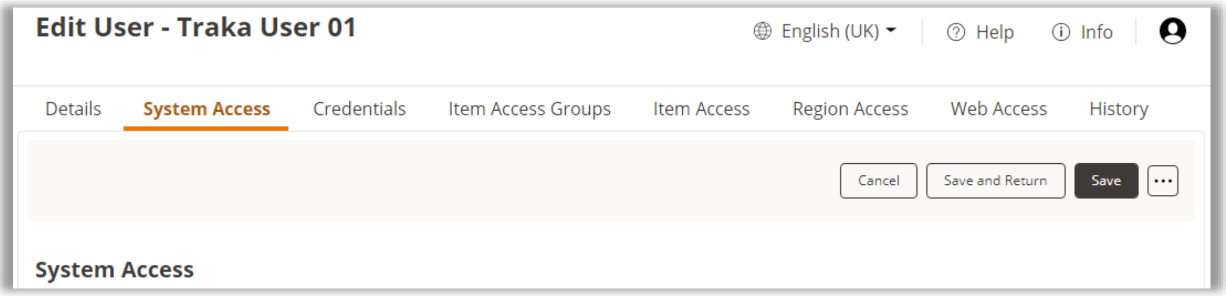
NOTE: The Emergency Open feature can still be used during a System Lock Out. For further information, please refer to UD0090 – Traka Touch Lockers User Guide or UD0258 - Traka Touch Pro User Guide.

5.15.1 ENABLING THE OPTION

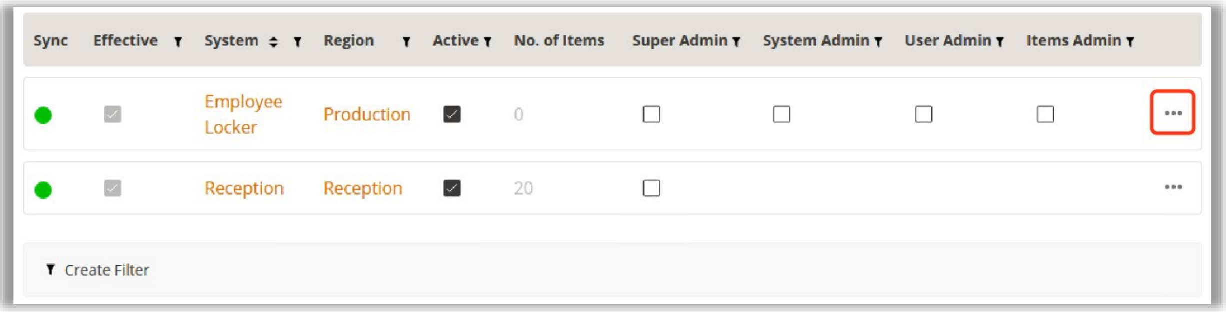
1. To enable the Emergency Open option, select a user from the users' list within TrakaWEB and then select **Edit**.



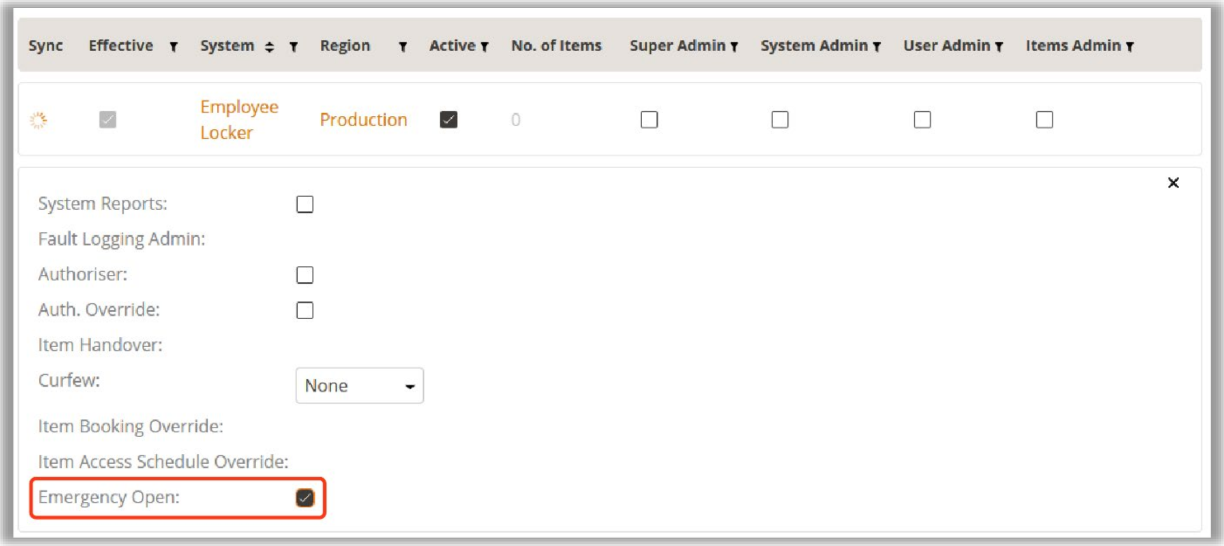
2. At the **Edit User** screen, select the System Access tab.



3. Find the Locker system where you would like to make the Emergency Open option available to your chosen user and click on the Ellipsis symbol appropriate to this system.



4. A new panel will open. Towards the bottom of that panel, the **Emergency Open** option will be available. Click on the check box to enable it as shown below.

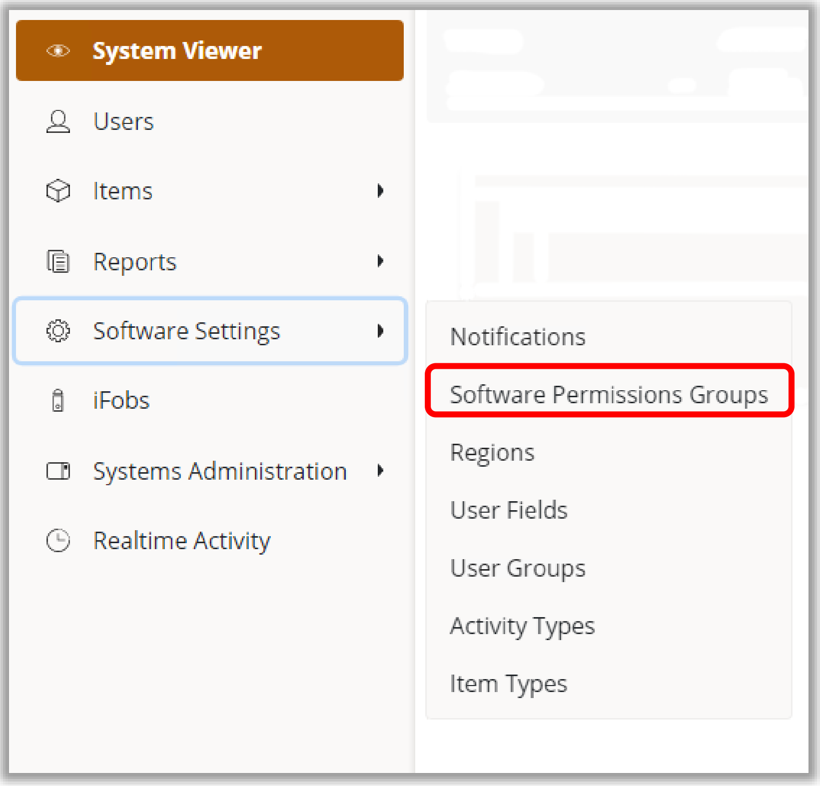


5. Once completed, click on **Save and Return**.

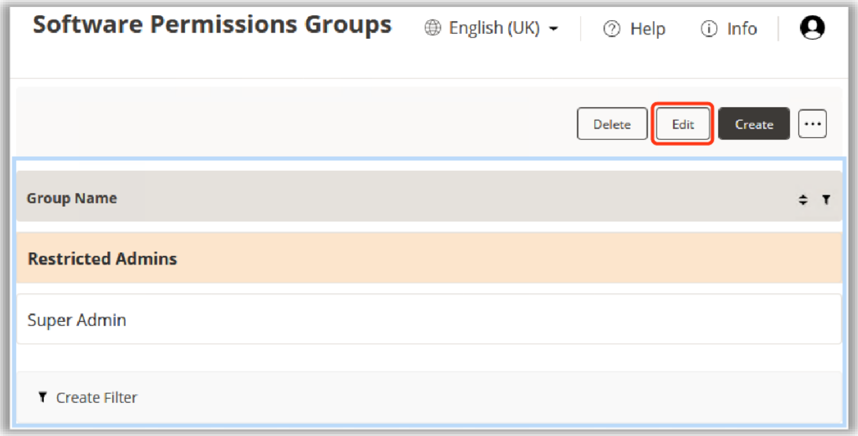
5.15.2 SOFTWARE PERMISSIONS GROUP

To enable a user to edit the value of the Emergency Open option within TrakaWEB, a user with the Admin role can assign the **Enable Emergency Open Role** within the Software Permission Group.

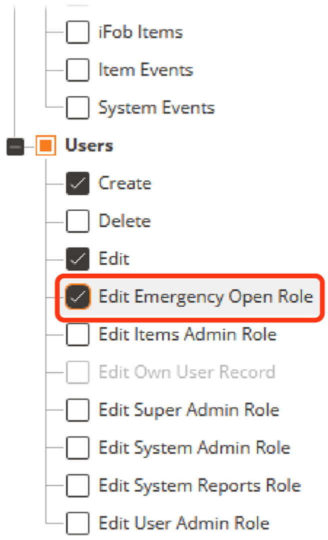
1. From the Navigation Menu, select Software Settings and then **Software Permissions Groups**.



2. From the software Permissions Groups page, select the Group you wish to apply the Permission to and click on **Edit**.



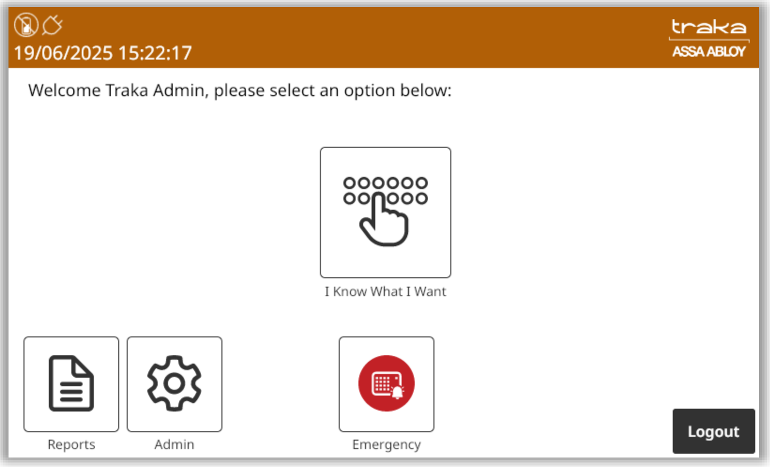
3. At the next page, navigate through the Permissions Group Tree and place a tick in the check box for the **Edit Emergency Open Role.**



4. Once complete, click on **Save and Return**.

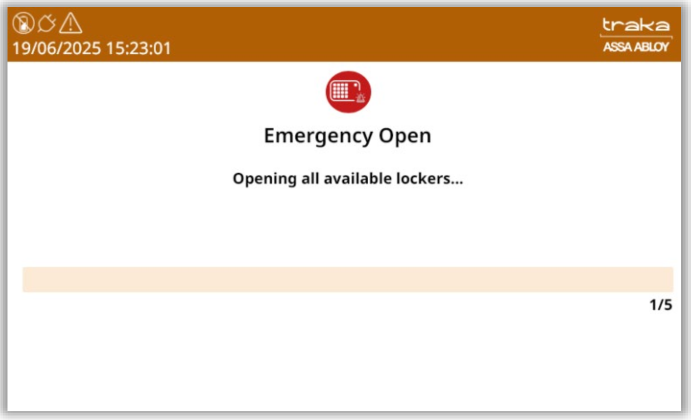
5.15.3 USING EMERGENCY OPEN

With the Emergency Open option enabled, access the Traka Touch system using keypad, fingerprint, or credential. You will then be presented with the following screen:



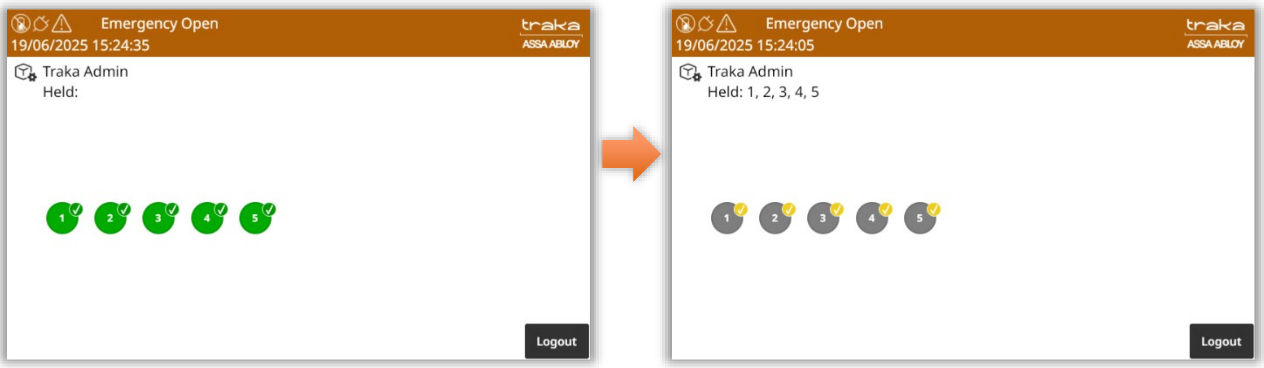
1. Next, select the Emergency icon  on the Touch screen. All the doors to the Locker system will now open sequentially.

As the doors are opening, a progress bar will display the door count during the process. A flashing **Emergency Open** message will also be displayed at the top of the screen to show that the Emergency Open option has activated.



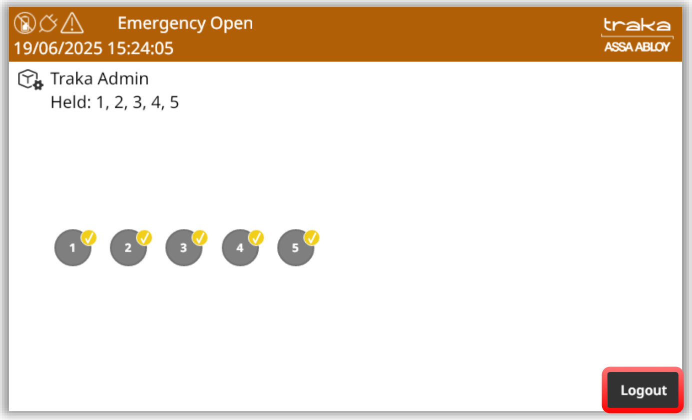
You will now be taken to the 'I Know What I Want' screen. Here you will be shown all the items currently in the system and their status. The item icons will change as the items are removed from the system.

NOTE: Closing all the doors at this stage will automatically log you out and return to the main login screen.

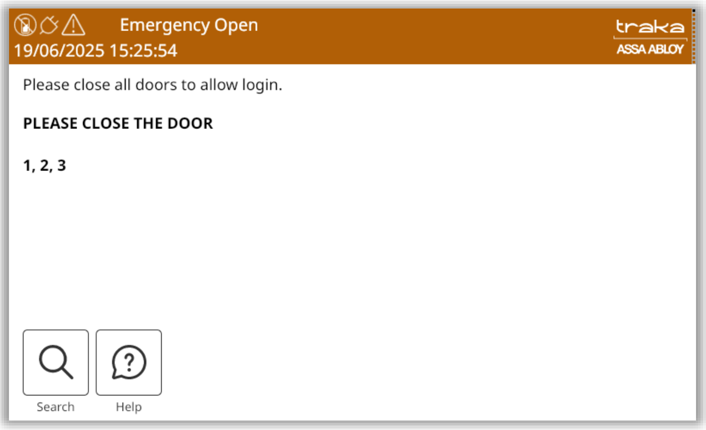


If you choose to select the Logout button on the screen without first closing all the doors, you will remain logged in until all the doors have been closed as detailed below.

2. Select the **Logout** button to exit.

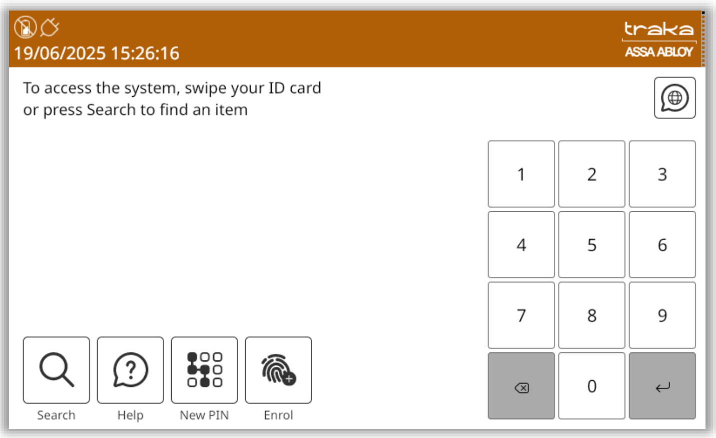


If one or more doors remain open, you will not be fully logged out and you will see the following screen indicating which doors remain open:



NOTE: The Emergency Open message will continue to display on the screen if one or more doors remain open and the configured auto-logout timeout will not apply.

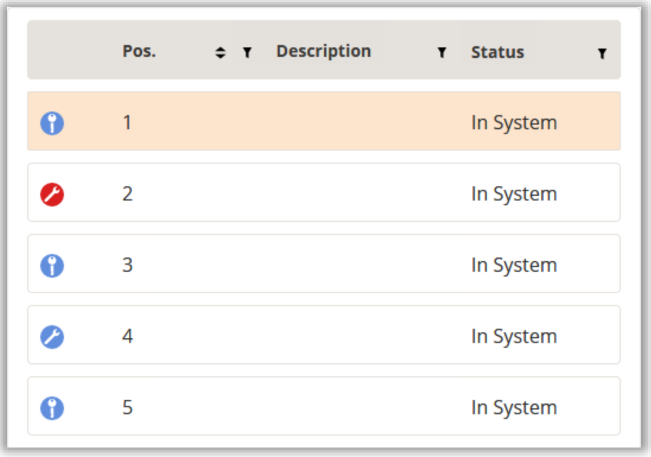
3. Close any open doors as required. You will then be taken back to the main login screen and the Emergency Open will be deactivated.



5.15.4 EMERGENCY OPEN WITH FAULT LOGGING

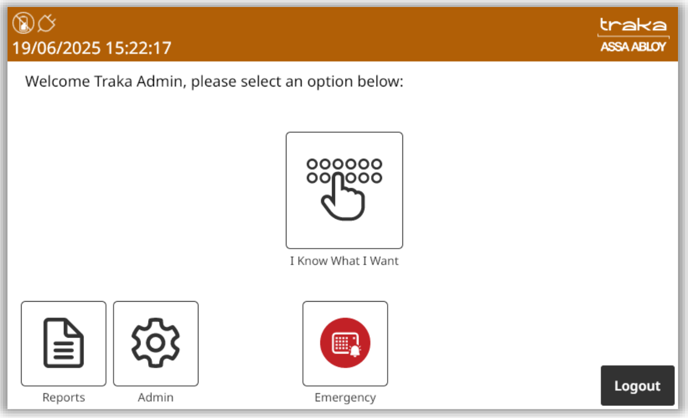
The Emergency Open option with Fault Logging enabled will operate with much the same functionality as with a standard setup Locker system. The main difference will be noted if a Locker contains an item with one or more critical faults logged against it. Lockers containing items with critical faults will not be opened by the Emergency Open process.

The example below shows a Locker system containing non-critically and critically faulty items.



	Pos.	Description	Status
	1		In System
	2		In System
	3		In System
	4		In System
	5		In System

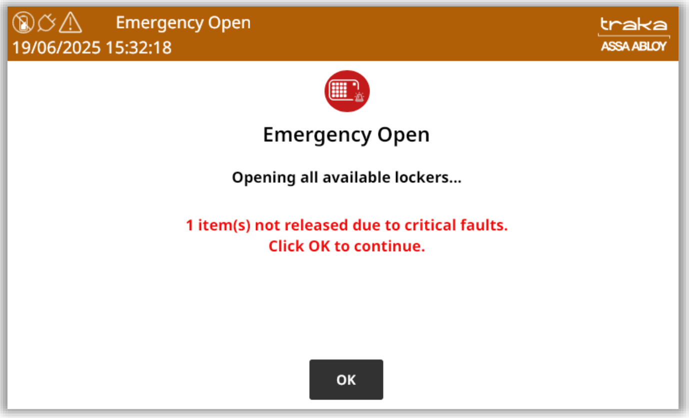
1. With the Emergency Open option enabled, access the Traka Touch system using keypad, fingerprint or credential.
2. Select the **Emergency** icon on the Touch screen.



The doors will now open sequentially as described previously, except any doors to compartments containing items with critical faults.

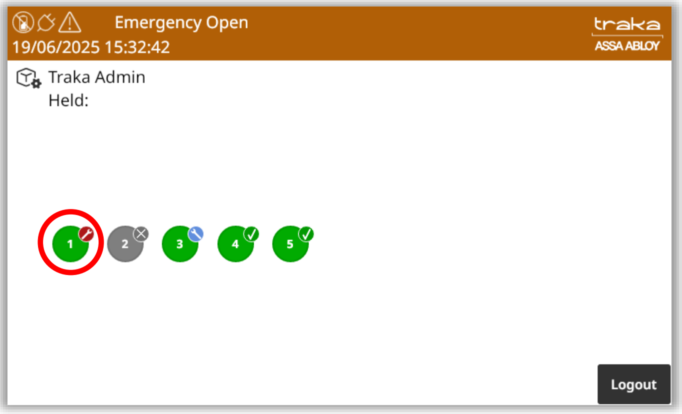
NOTE: The message on the Touch screen will now indicate that 1 item could not be released due to a critical fault.

3. Click on **OK** to continue.

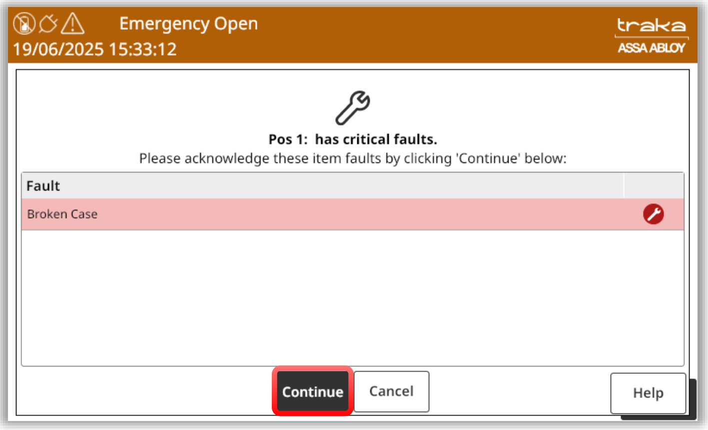


A user with the Fault Logging Admin role will be able to select the item from the touch screen.

4. Select the item with the critical fault.



5. At the next screen, you will be required to acknowledge that the item has a critical fault. Select the **Continue** button to accept the critical fault.



The door will now open allowing access to the item with the critical fault.

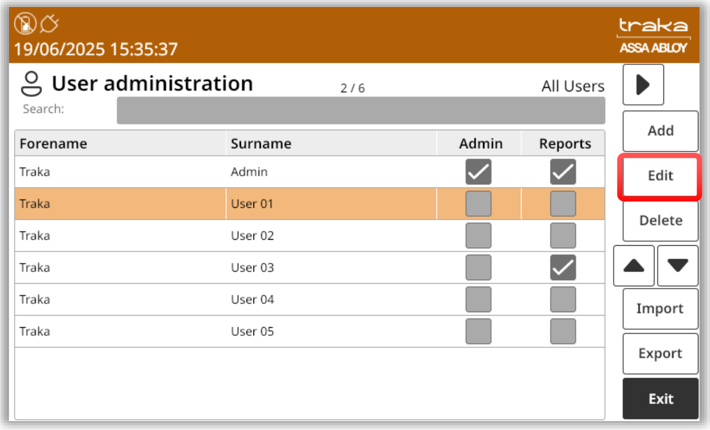
NOTE: As the I Know What I Want screen will continue to display after the Emergency Open procedure, you may also choose to reopen any doors that you may have closed.

Events will be recorded anytime the Emergency Open Feature is activated and deactivated. Events can be viewed in Reports in TrakaWEB.

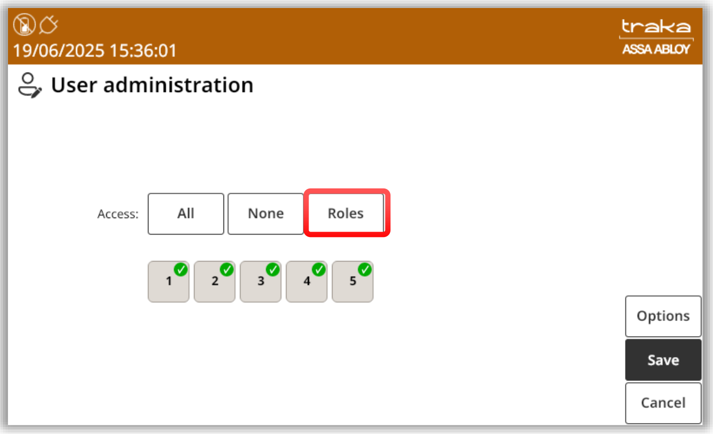
5.15.5 GRANT/REVOKE EMERGENCY OPEN IN TRAKA TOUCH

If your system is a stand-alone configuration i.e., it is not connected to TrakaWEB, the option to grant or revoke the Emergency Open permission to a User may be carried out in Traka Touch.

1. After logging in, select the user that you wish to grant the Emergency Open option to and then select **Edit** and then **Access.**

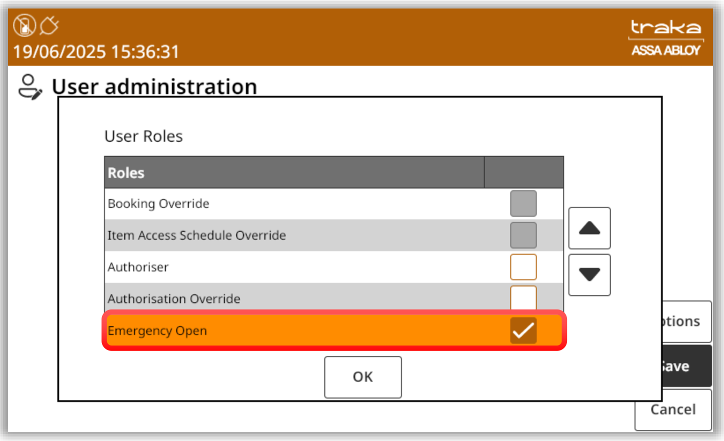


2. At the next screen, select the **Roles** button.



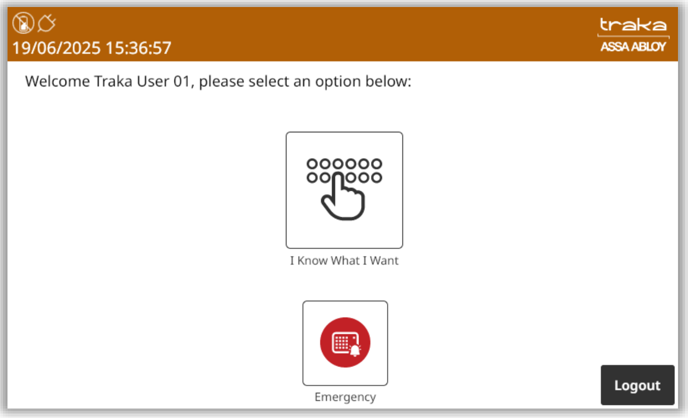
A new window will appear displaying a list of roles.

3. Navigate through the list and select the **Emergency Open** role. The icon will change to a tick as shown below.



4. Once completed, select **OK** and then **Save** and **Exit.**

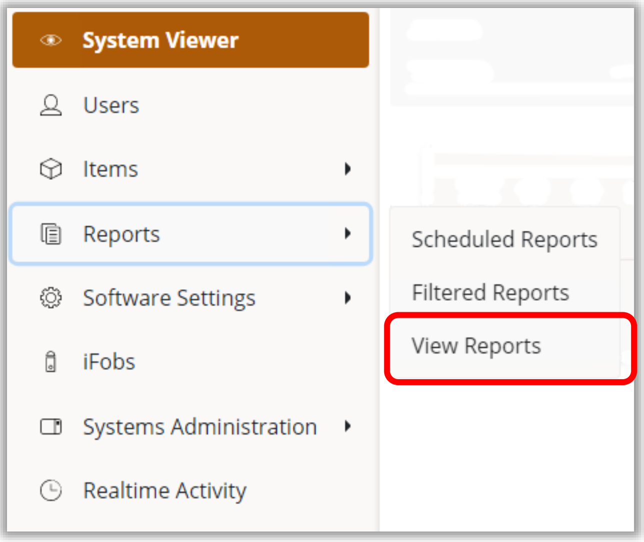
When the user who has been granted the Emergency Open permission logs into the system, they will see the option for **Emergency Open** available on the screen.



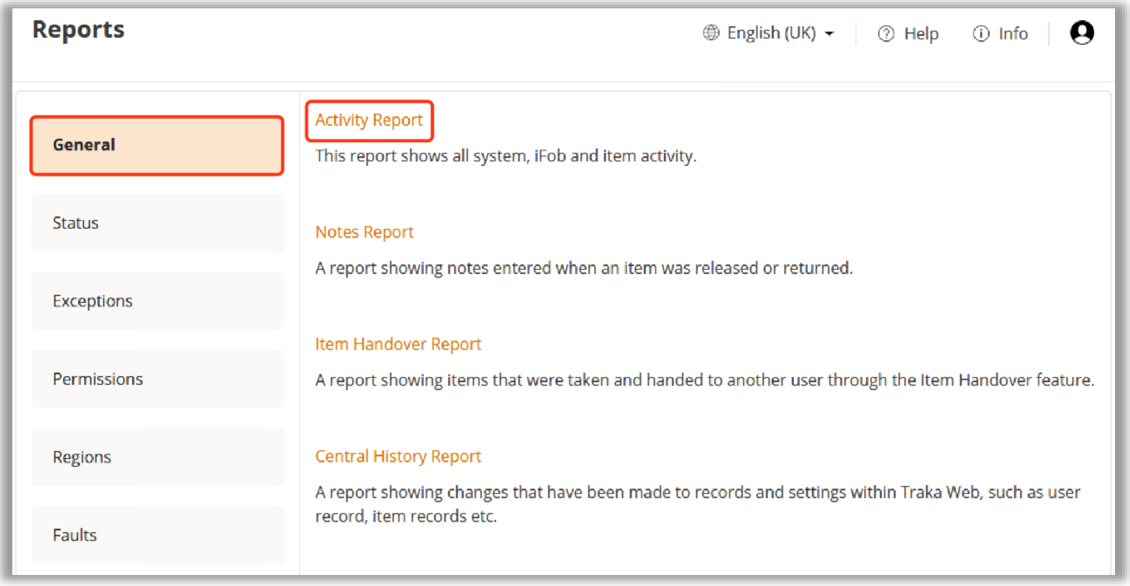
5.15.6 REPORTS

Events will be recorded anytime the Emergency Open feature is activated and deactivated. Events can be seen in Reports within TrakaWEB.

1. From the Navigation Menu, Select Reports.

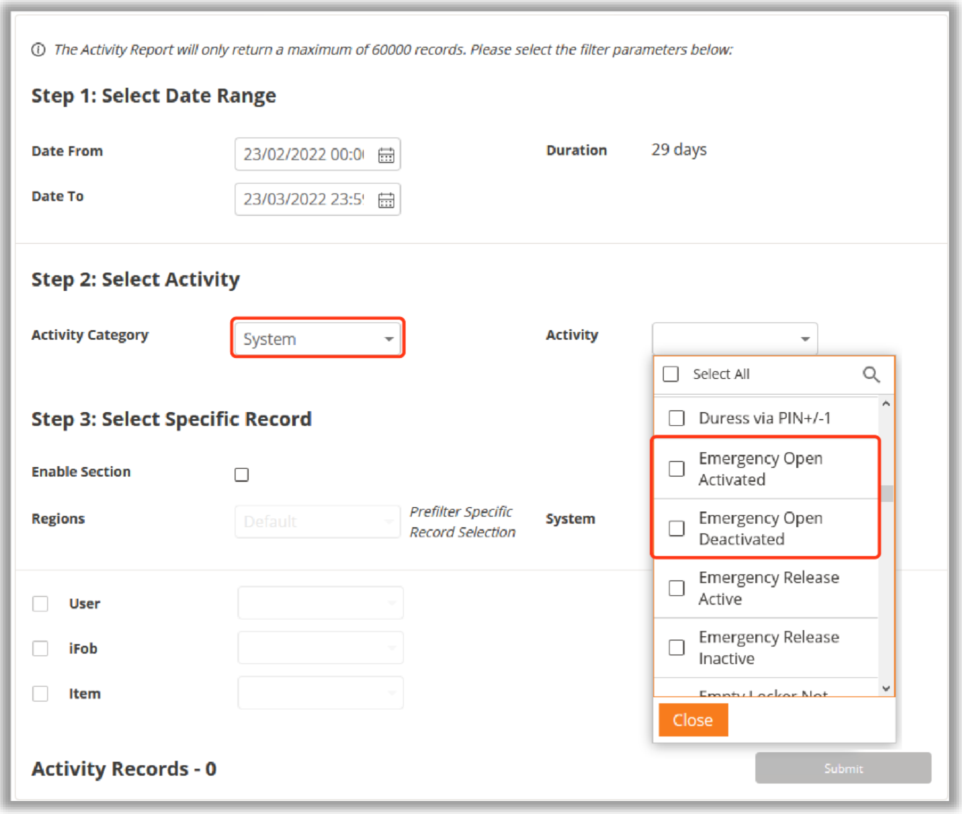


2. At the View Reports page, select the **General** tab and then select the **Activity Report**.

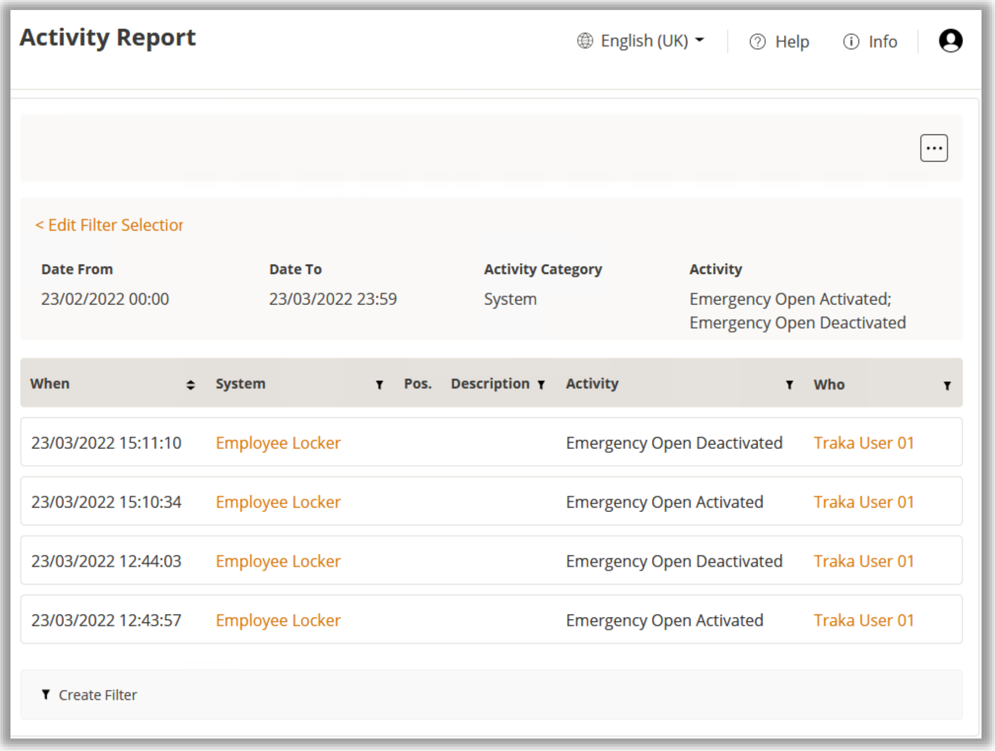


The next page will allow you to choose the date range, Activity Category, and specific Activity for the report you are about to generate.

3. Select the **System** as **Activity Category** and check the **Emergency Open Activated** and **Emergency Open Deactivated** as **Activities**.

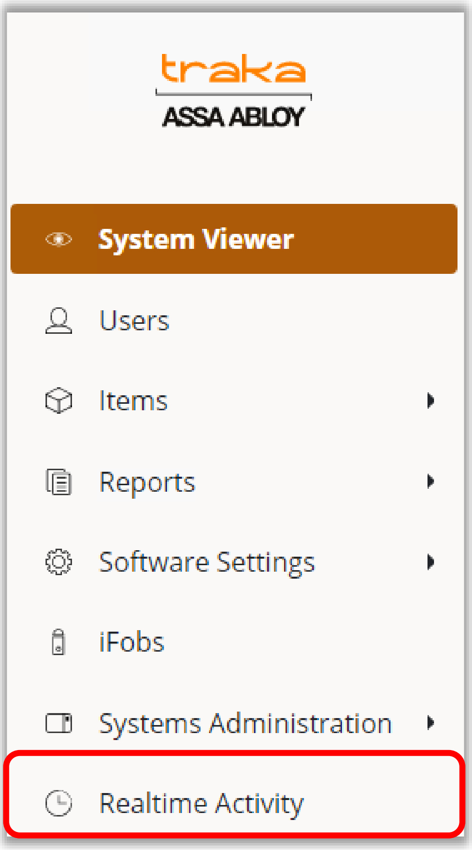


4. Submit your report when ready. The next page will display a list of Activity Events. In the example below, events can be seen generated for instances where the Emergency Open feature was activated and deactivated.

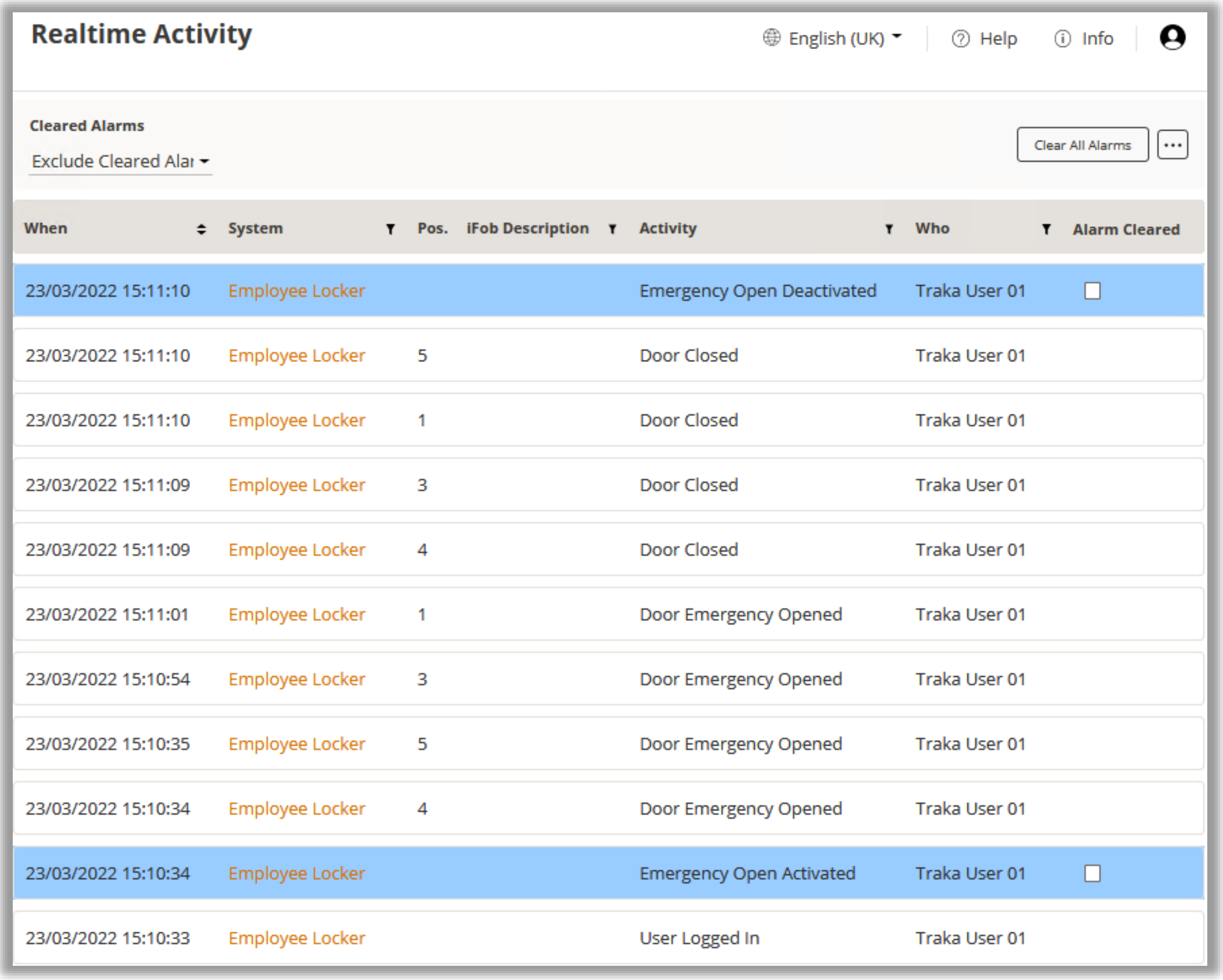


From the Realtime Activity icon in the Navigation Menu, a list of alarms generated from the activation and deactivation of the Emergency Open feature can be viewed.

1. Select the Realtime Activity icon from the Navigation Menu.



The next page will now display the list of generated alarms as shown in the example below.



5.16 RANDOM RETURN TO SINGLE SYSTEM (RRSS)

This feature is available from Traka Touch Application V1.6.0.

NOTE: This feature is currently not available for Locker Systems.

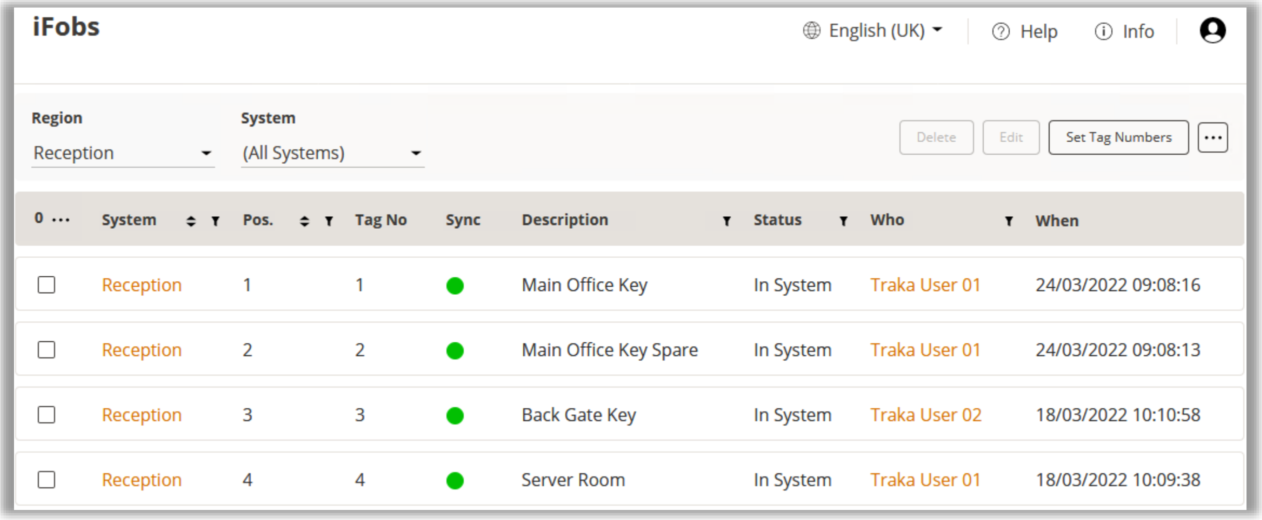
RRSS (Random Return to Single System) allows any iFob belonging to a system to be returned to any position within that system. It will also support more iFobs than receptor sockets (up to a maximum of 720 iFobs in total).

NOTE: To use the RRSS feature you must first have it enabled in the configuration file.

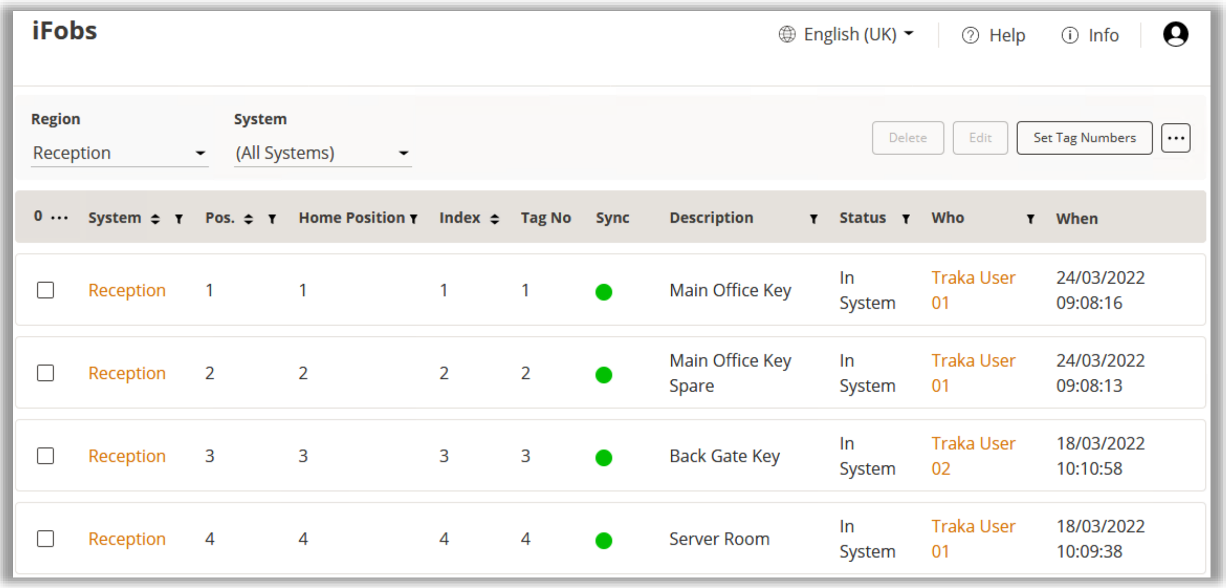
USEFUL TIP: Use the 'I Need To Search' option when removing iFobs for ease of locating required items.

5.16.1.1 IFOB LIST

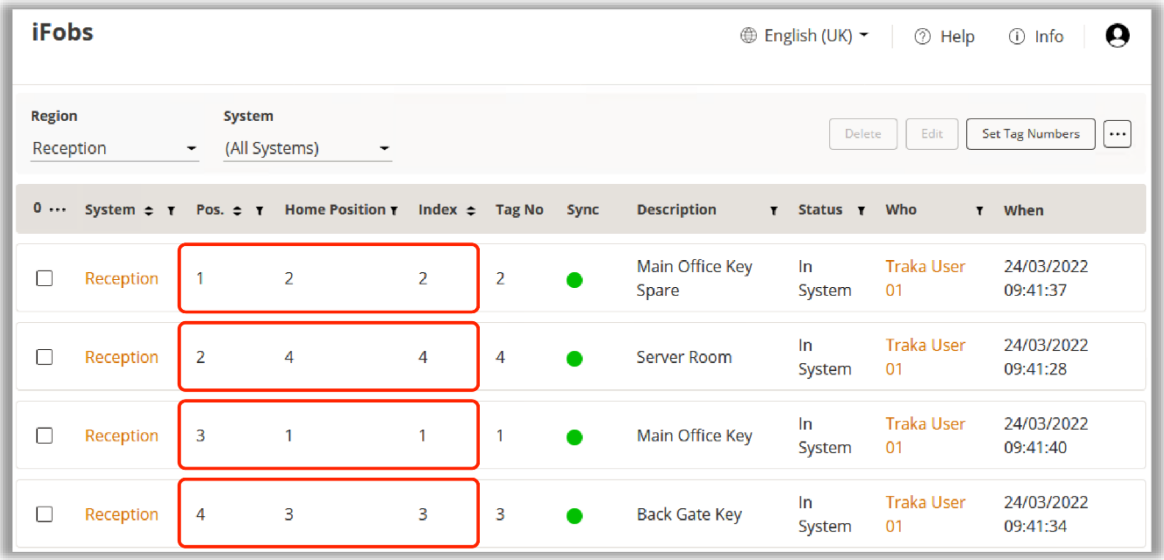
With the RRSS feature enabled, the iFob list page by default displays the same information as previously and presents at which Position each iFob is stored at the moment.



In addition to this, you can enable the **Home Position** and **Index** columns to allow you to see unique details for each iFob regardless of the position it is being stored in at any moment in time.



With the system operating normally and the keys being in use and being returned to random positions, the iFobs **Positions** will change, but the **Index** and **Home Position** values will remain the same unless purposefully changed.



If you need to read more on how to change the **Home Position** value for an iFob, please refer to the iFobs section in this document.

Index

During the Item Setup process, each iFob is assigned a unique index number. This index number will stay with the iFob for life. It is possible for this index number to be larger than the total number of positions available in the system as the RRSS feature supports more iFobs than receptor sockets.

NOTE: The process for setting up the items at the Traka Touch system can be found in the RRSS section of UD0011 - Traka Touch User Guide.

5.16.1.2 IFOB REPLACEMENT

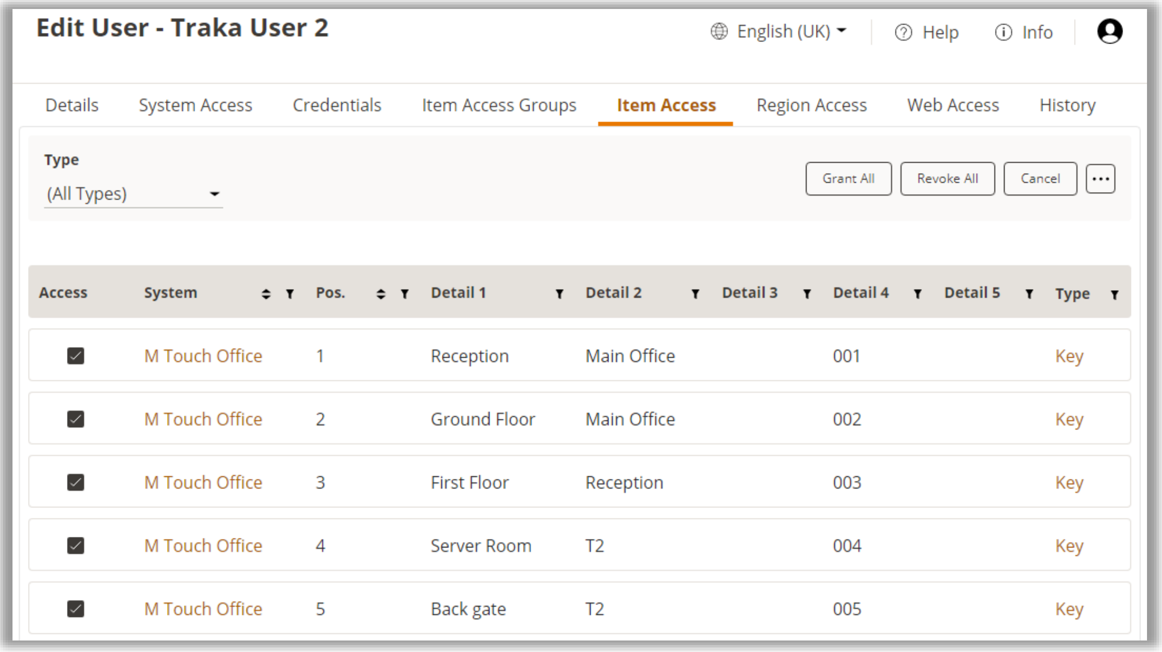
From time to time, you may be required to replace an iFob that has become lost or damaged. During the replacement procedure, TrakaWEB will transfer all allocated items from the old iFob to the new iFob. The old iFob will remain in the iFob List, but as an unallocated iFob. The system will also generate an 'Item Replaced' event.

NOTE: The Item Replacement procedure can be found in the UD0011 - Traka Touch User Guide in the RRSS section.

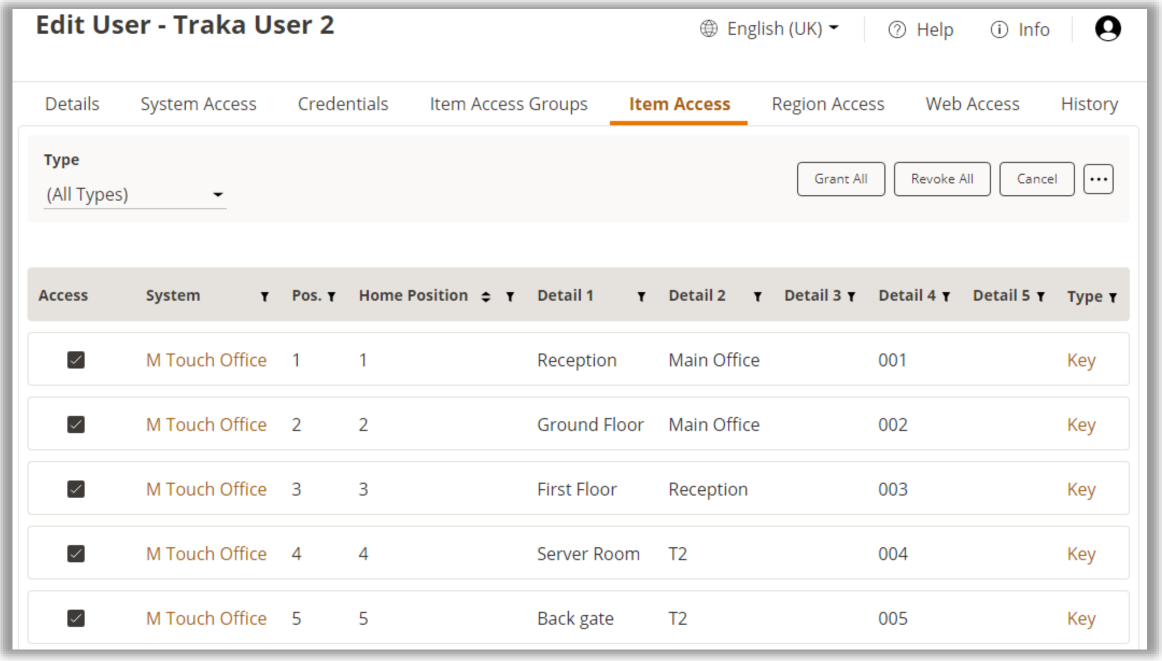
5.16.1.3 GRANTING ACCESS TO ITEMS

Granting access to items in a RRSS system is carried out in the same way as on a Fixed Return system. The Item List each time shows the Items with their current position numbers.

Simply navigate to the **Item Access** tab on the Edit User page and select the Items the user requires access to by ticking the boxes in the Access column.



With that in mind, you can use the Show/Hide Grid Columns option to show the Home Positions and the Index numbers for each of the Items in the table.



5.17 ACCESS SCHEDULES

Access Schedules is a non-cost option that is used within TrakaWEB to impose time restrictions on iFobs/items and users over and above the normal access rights needed to access them.

Before it can be used, it will need to be enabled on your Traka Touch system by installing a configuration file. This is usually carried out by Traka during production but, if need be, you can add the configuration file to your own existing system. Please contact Traka or your distributor for further details.

The functionality of Access Schedules is based on the following requirements:

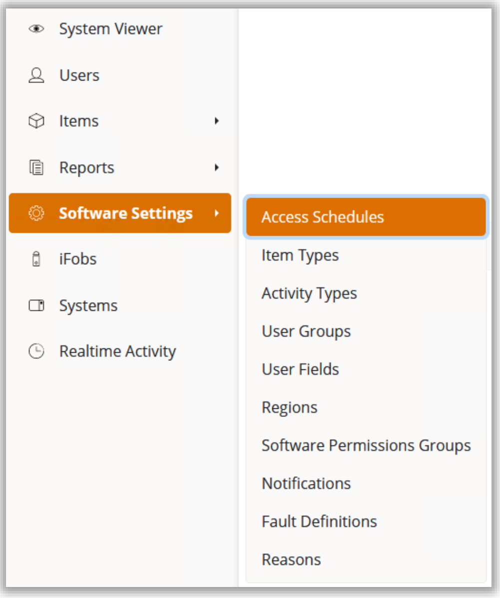
- To grant/restrict access, any users who are included in a schedule will only be allowed access to iFobs/items when the schedule is active. Outside of this time, they will have access to no iFobs/items at all
- The access restrictions will not prevent a user from returning an item, only taking it
- Locking receptor strips on key cabinets and locker doors will physically restrict access to items. However, Non-Locking receptor strips are unable to enforce this
- If an Item is physically removed outside of the allowed access schedule (e.g., on a non-locking system) then an 'Item Removed outside Schedule' event will be recorded
- A schedule restriction can be overridden on an Item (not a user) by a special role called 'Item Access Schedule Override'
- Software permissions will control who can administer the Access Schedules

NOTE: The best practice would be to keep users and item/iFobs in separate Access Schedules to avoid potential confusion.

NOTE: If a System Lock Out overruns into the end of an Access Schedule, Traka Touch will allow a User to log in to the system to return an item but will prevent the removal of further items. For further information, please refer to UD0258- Traka Touch Pro User Guide.

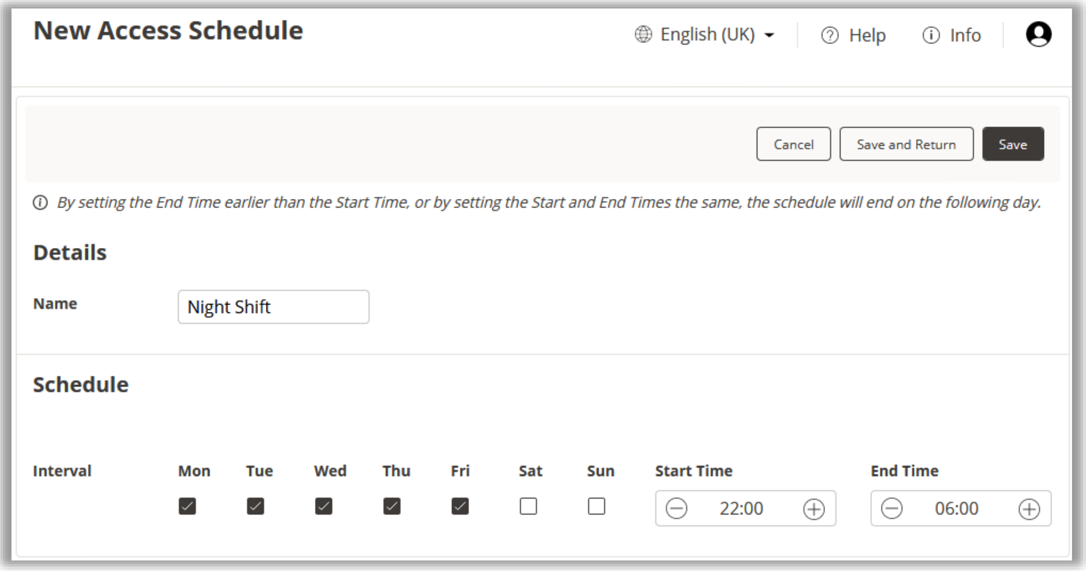
5.17.1 CREATE A NEW ACCESS SCHEDULE

1. From the Navigation Menu, click on 'Software Settings', then locate and click on the **Access Schedules** icon.



2. At the next page, click on the **Create** button. You will now be taken to the **New Access Schedule** page.

3. Add a name for the Access Schedule and then check the required boxes for the schedule interval and create the start and end time. An example is shown below:



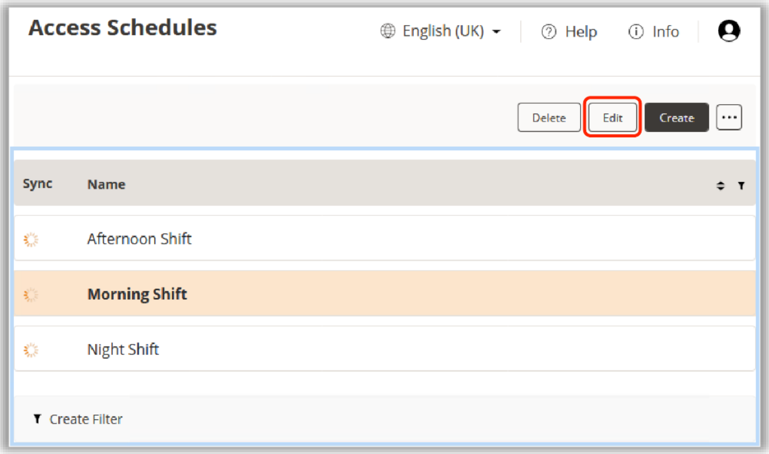
NOTE: In the example above, the start time is set for 22:00 and the end time is 06:00. The Access Schedule for Friday will end on Saturday morning even without the check box for Saturday being ticked.

4. Once complete, click on **Save.**

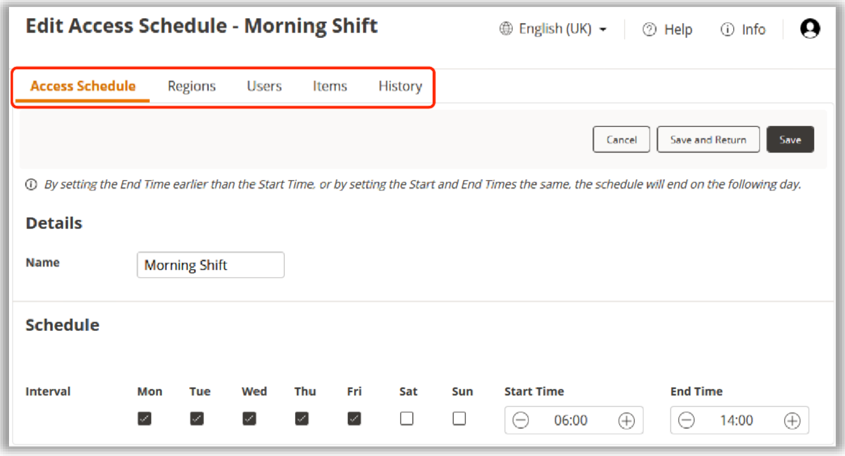
5.17.1.1 APPLY ACCESS SCHEDULES TO USERS AND IFOB/ITEM RECORDS

1. Click on the Access Schedules icon in the Navigation Menu.

2. Select the Access Schedule you wish to apply to a User or iFob/Item and click on Edit as shown below.



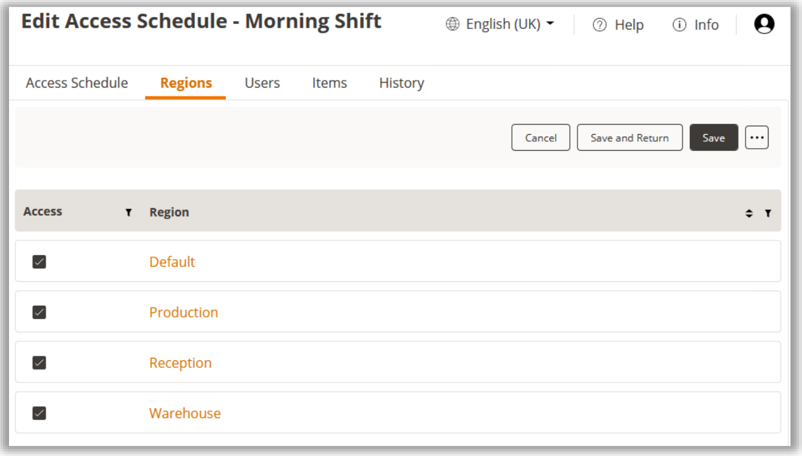
You will now be taken back to the Access Schedule page, displaying the selected Access Schedule.



Selecting the tabs along the top of the page will allow you to control how you wish to apply the Access Schedule.

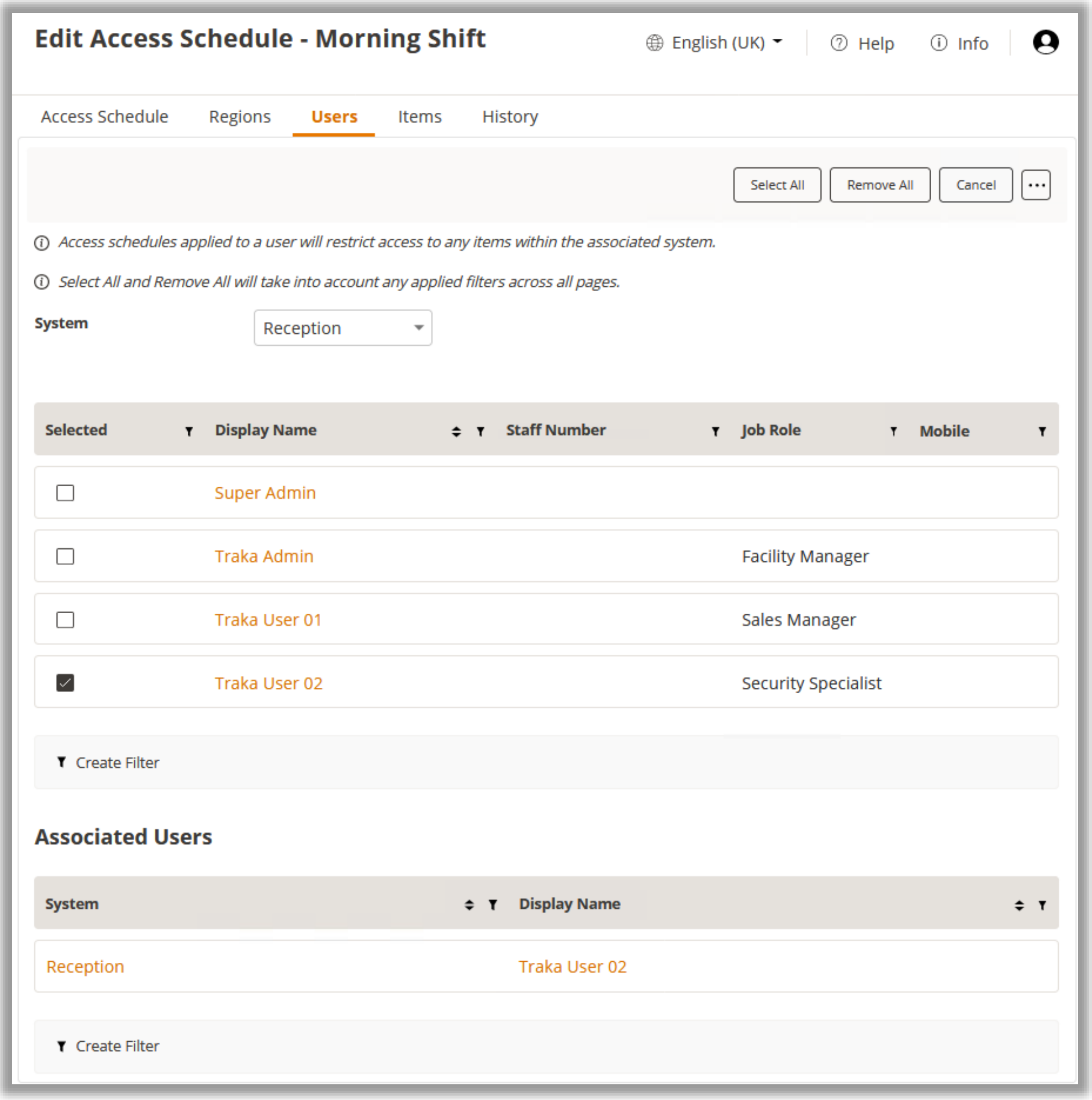
5.17.1.2 REGIONS

The Regions tab allows you to select different regions which will be affected by the selected Access Schedule.



5.17.1.3 USERS

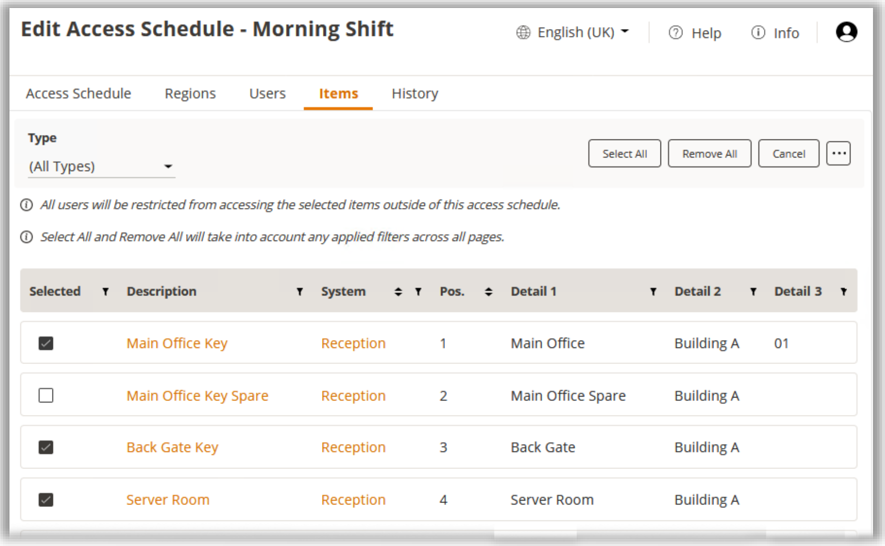
The Users tab allows you to select individual users that will be affected by the Access Schedule. The records are divided in two parts, the upper showing the list of all the users registered in TrakaWEB, and the lower part showing the list of all the users who are currently associated with the selected Access Schedule. Associated users will not have access to iFobs/Items outside the specified schedule unless they have been given the Item Access Schedule Override permission.



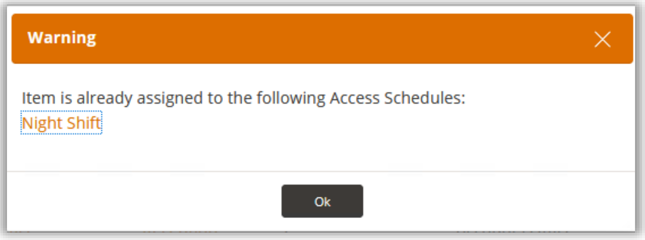
NOTE: Please keep in mind that the association of users with selected Access Schedules will need to be made on a per-system basis. As a result, one user can be associated with one Access Schedule on one system, and with a different Access Schedule on another system. Remember, though, that one user can only be associated with a maximum of two Access Schedules at any given time.

5.17.1.4 ITEMS

The Items tab will allow you to select which iFobs/items are affected by the specified schedule. All users will be restricted from accessing any selected items outside of the schedule unless they have been given the Item Access Schedule Override permission.

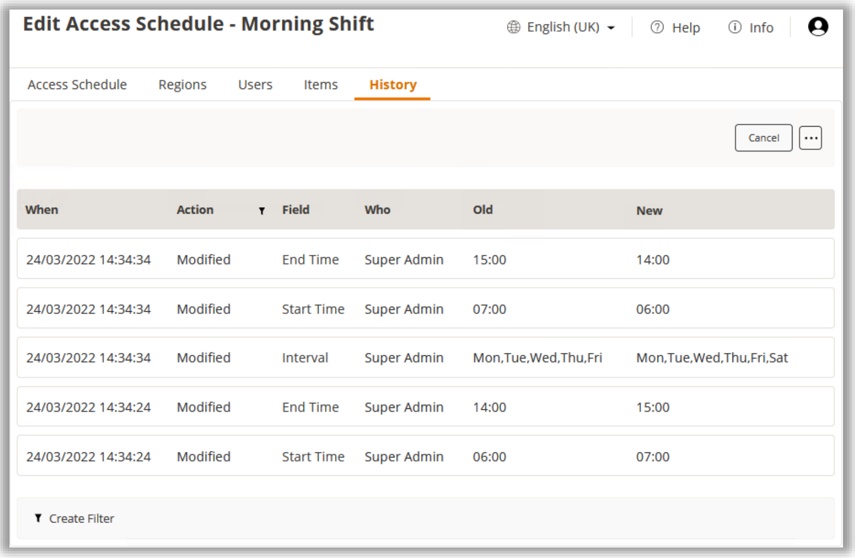


If an item has already been assigned to an Access Schedule, you will be unable to select it within any other schedules. Its check box will appear greyed out. This is because only one access schedule can be applied to an iFob/item. Attempting to click on the check box will display the following message:



5.17.1.5 HISTORY

The History tab will display all the recent history of created Access Schedules. An example is shown below:



5.17.1.6 FINALISE CREATION OF AN ACCESS SCHEDULE

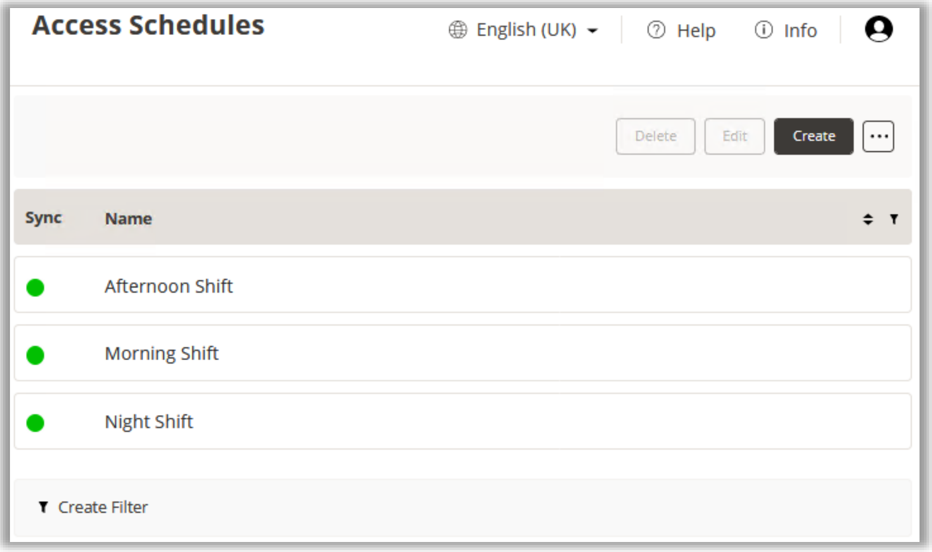
1. Once completed, click on **Save and Return.**

NOTE: Only 1 Access Schedule can be applied to an iFob/Item record.

NOTE: Up to 2 Access Schedules can be applied to a User record per system.

2. Once the Access Schedule has been created, click on **Save and Return**.

NOTE: The rotating sync icons will now appear green to indicate that the Access Schedules are now in place and have been synced to the relevant Traka Touch systems.



5.17.2 EDIT ACCESS SCHEDULES

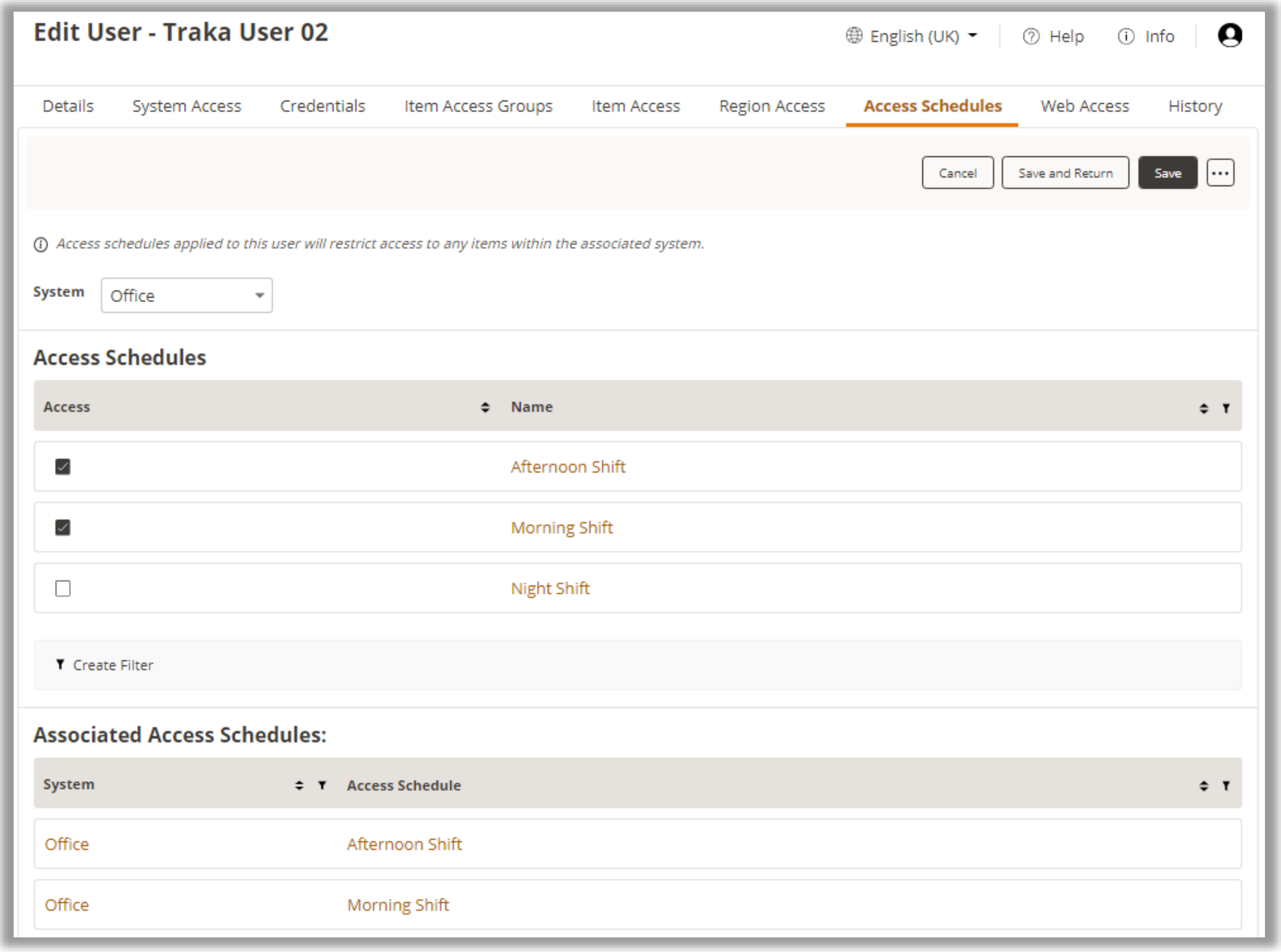
5.17.2.1 EDIT USER

1. To edit an Access Schedule applied to a user, select **Users** from the Navigation Menu.

2. At the Users page, double click on the user you wish to edit. This will then take you to the **Edit User** page for that specific person.

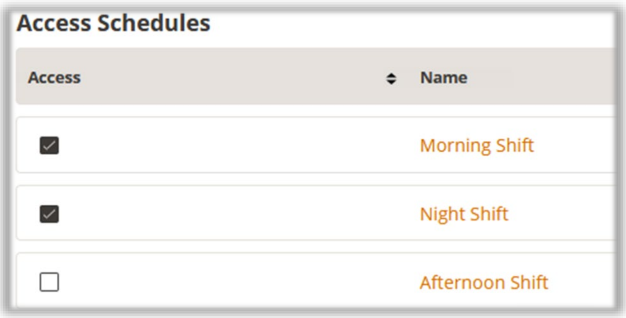
3. Click on the **Access Schedules** tab located at the top of the screen.

The next screen is divided into two parts. The upper part shows all the existing Access Schedules with the checkboxes ticked for the ones which the user is associated with. The lower part shows only the Access Schedules which are currently applied to that user.



Here, you may filter the list of Access Schedules, and which systems are affected by them, restricting the user any access to the one currently selected.

To select which Access Schedule/s you wish to apply to the user, select one or more boxes as shown in the example below:



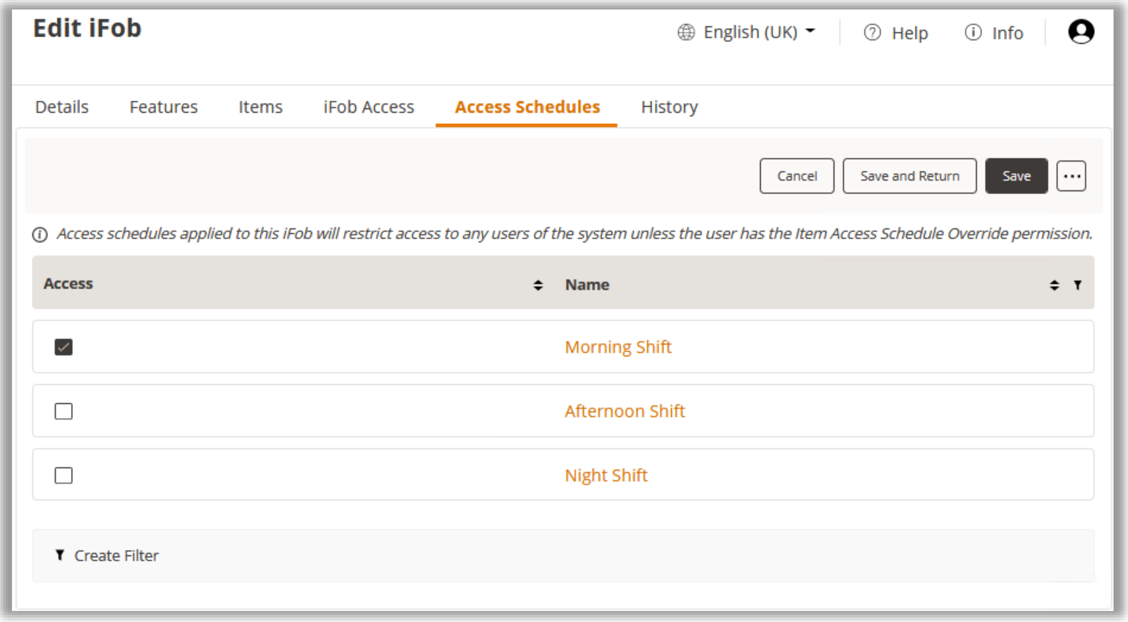
5.17.2.2 EDIT IFOBS/ITEMS

1. To edit an Access Schedule applied to an iFob/Item, click on **iFobs** in the Navigation Menu.

2. At the iFobs page, double click on the iFob you wish to edit. This will then take you to the **Edit iFob** page for that specific iFob/item.

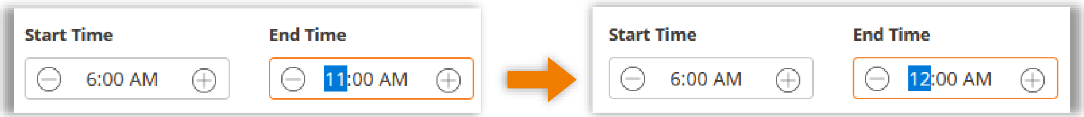
3. Click on the **Access Schedules** tab located at the top of the screen.

The next screen shows the Access Schedules which are currently applied to that iFob/item. Clicking in the check box will apply the restrictions to all users of that system outside of the schedule unless they have the Item Access Schedule Override permission.

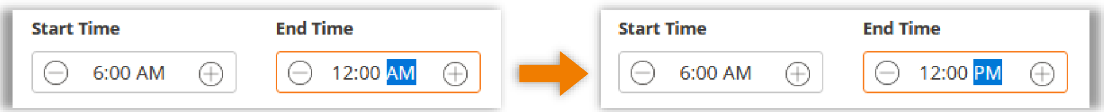


5.17.2.3 EDIT THE TIME PICKER FOR 12 HOUR TIME FORMAT

As the US locale uses the 12hr time format, it is necessary to edit the AM or PM suffix in TrakaWEB manually. For example, instead of changing to 12:00 PM when incrementing from 11:00 AM, the time will go back to 12:00 AM as shown below.



To adjust the suffix, click on AM or PM and click on the '**+**' and '**-**' buttons to adjust the increment.

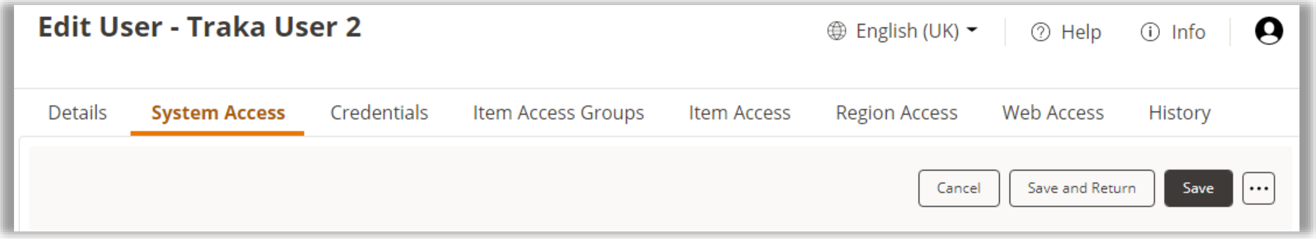


5.17.2.4 ITEM ACCESS SCHEDULE OVERRIDE

It is possible to allocate a user the Item Access Schedule Override permission. This will allow them to take iFobs/Items regardless of an Access Schedule being in place against the item.

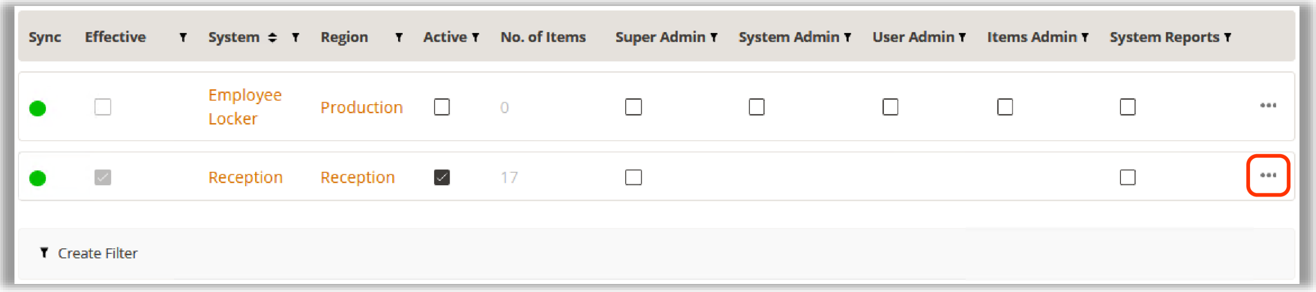
To allocate a user with the permission:

1. Select **Users** from the Navigation Menu.
2. Double-click on the user you wish to allocate the permission to.
3. At the Edit User screen, click on the **System Access** tab.

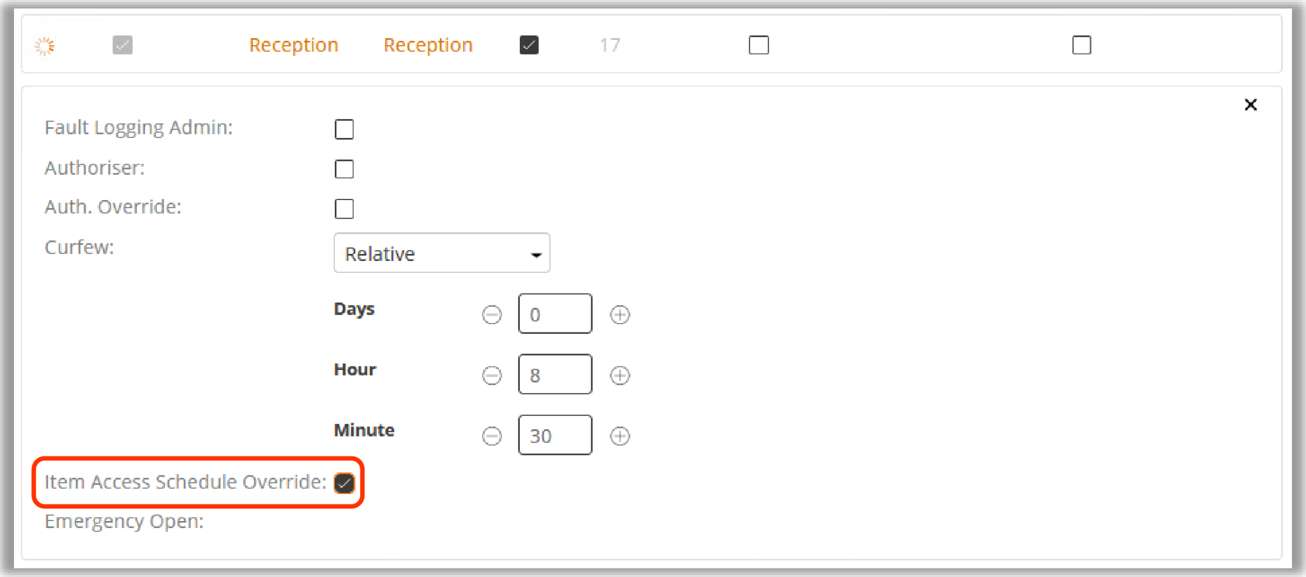


You will now be taken to the Edit User, System Access screen.

4. Locate the System on which you want the selected user to gain Access Schedule Override permissions and click on the **Ellipsis** symbol to the right of the system to open a new panel.



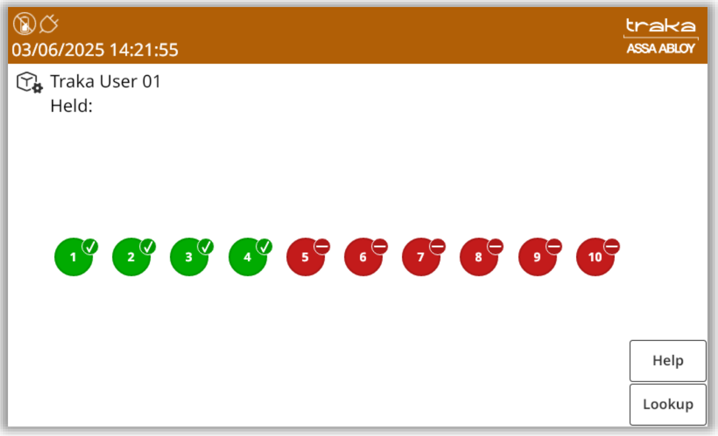
5. Place a tick in the check box to enable the permission as shown below.



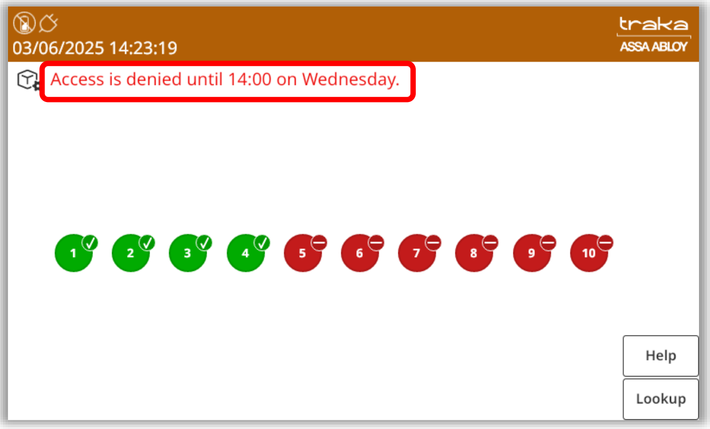
NOTE: If a user, who has the Access Schedule Override permissions, needs to access an item outside of the allowed time and that item is kept in either a FIFO or Advanced FIFO system, that user also needs to have FIFO Override permissions to get to the required item. For more information, refer to UD0232 - TrakaWEB FIFO and Advanced FIFO User Guide.

5.17.3 ACCESS SCHEDULES ON TRAKA TOUCH

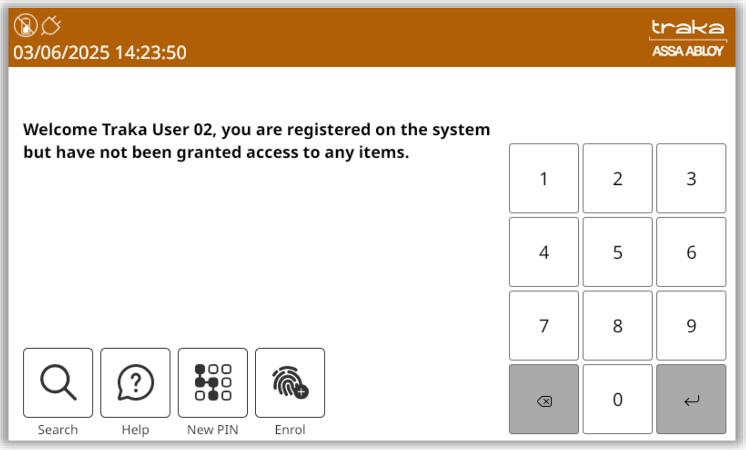
With an access schedule in place, it will not be possible for users to take items displayed as 10 outside of the allocated schedule. When a user typically accesses the system and attempts to take an iFob or item, the following screen will be presented:



If the user clicks on a position, they will see the following message:



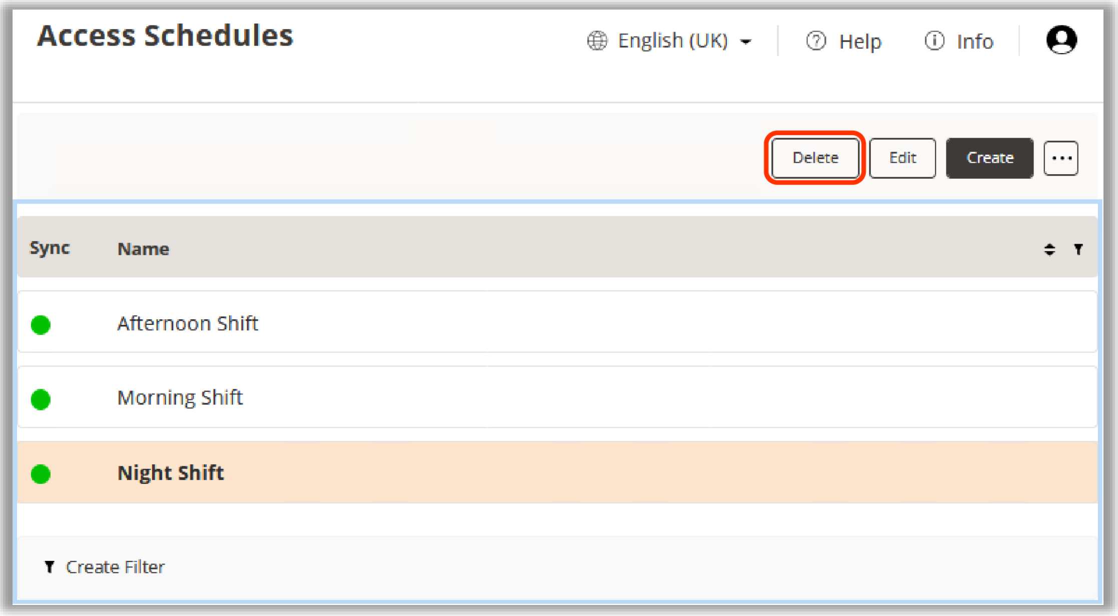
Any users who are included in a schedule will only be allowed access to iFobs/items when the schedule is active. Outside of this time, they will have access to no iFobs/items at all, and if they are not an admin user or do not have reports access, they will not be allowed to log in and will instead the following message:



NOTE: During an active schedule, anyone with access may take an item. Outside of the active schedule, only users with the Item Access Schedule Override permission will be able to take items.

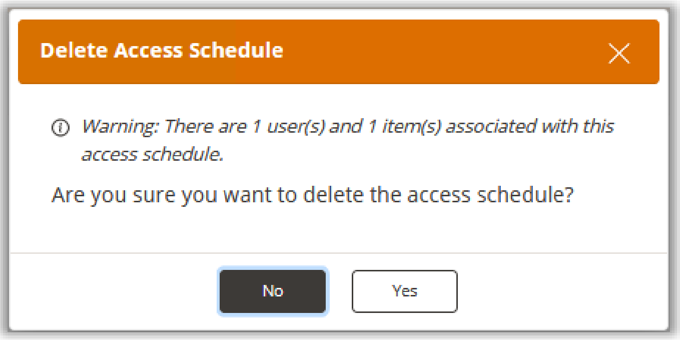
5.17.4 DELETE AN ACCESS SCHEDULE

1. In the Navigation Menu, select **Software Settings** and then **Access Schedules**.
2. Select the Access Schedule you wish to delete and click on **Delete**.



You will then be presented with the following screen asking you to confirm that you wish to delete the selected Access Schedule. If there are any Users or Items associated with this Access Schedule, the window will display appropriate information about it.

3. Click on **Yes**.

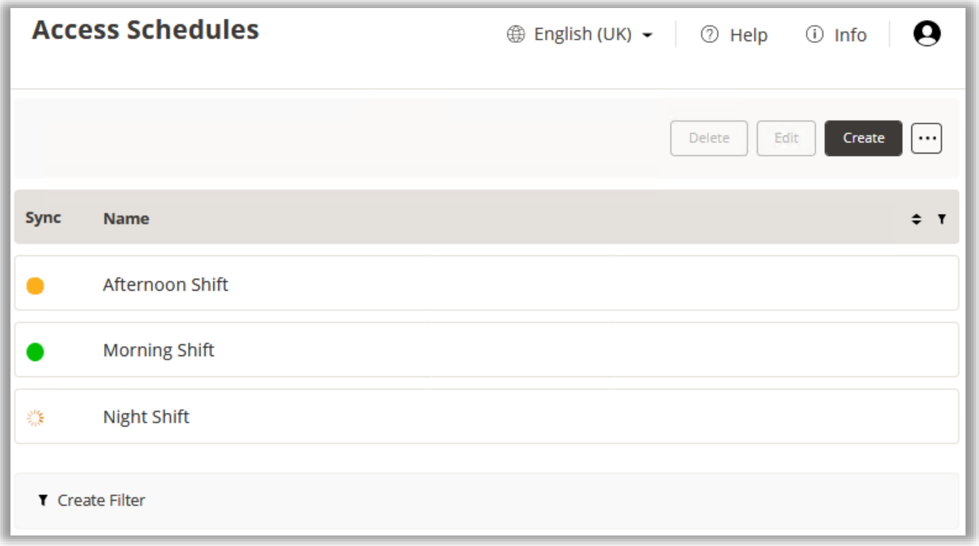


5.17.5 ACCESS SCHEDULES 'UMBRELLA SYNC STATUS'

The Access Schedule Landing Page displays the sync status of a Schedule for all associated systems. If an Access Schedule is changed, the change will have a direct impact on all systems associated with that schedule.

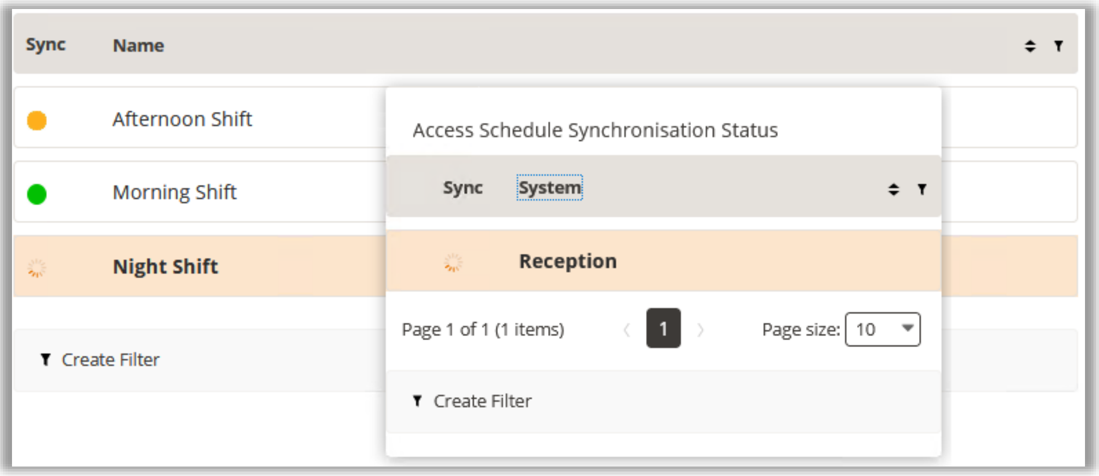
Depending on the number of systems associated with the access schedule, the status icon will reflect the overall current status in relation to the sync process.

- Green icon – sync on all systems successful
- Red icon – sync on all systems unsuccessful
- Orange icon – Combination of both successful and unsuccessful sync
- Spinning icon – Combination of successful, unsuccessful, and pending sync



Clicking on the sync status icon will display a window showing all the systems affected by the schedule change and their current sync status.

- Green icon – sync successful
- Red icon – sync failed
- Spinning icon – sync pending



5.18 USB CHARGE STATUS INDICATION

5.18.1 USB CHARGE STATUS INDICATION OVERVIEW

This feature can only be used with RFID Locker Systems and is supported from Traka Touch Application V1.5.4327.1.

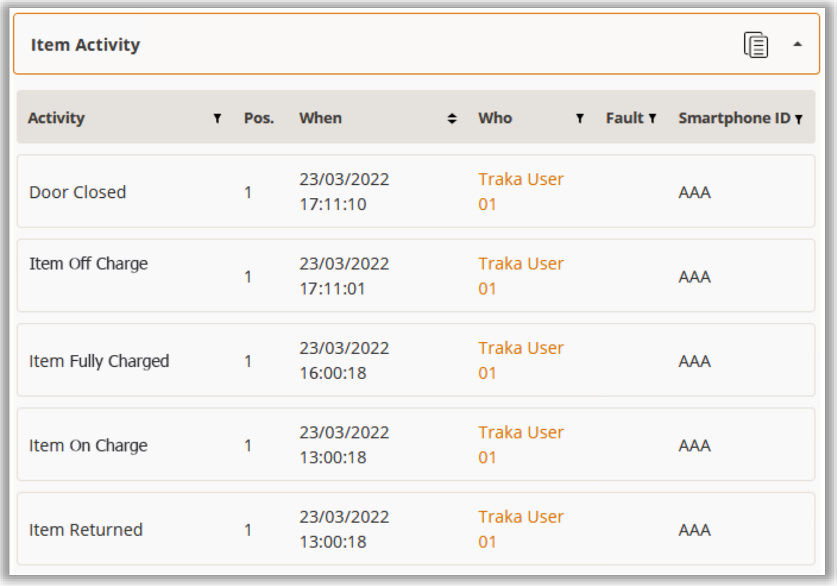
Locker systems can be fitted with optional hardware to allow the charging of USB devices inside locker compartments. This hardware also has the ability to detect whether or not the item in the compartment is currently on charge, if it is fully charged, or if the item has a charge fault.

For more details on how this feature is implemented and used on the Traka Touch Locker System, please refer to the **Traka Touch Lockers User Guide – UD0090.**

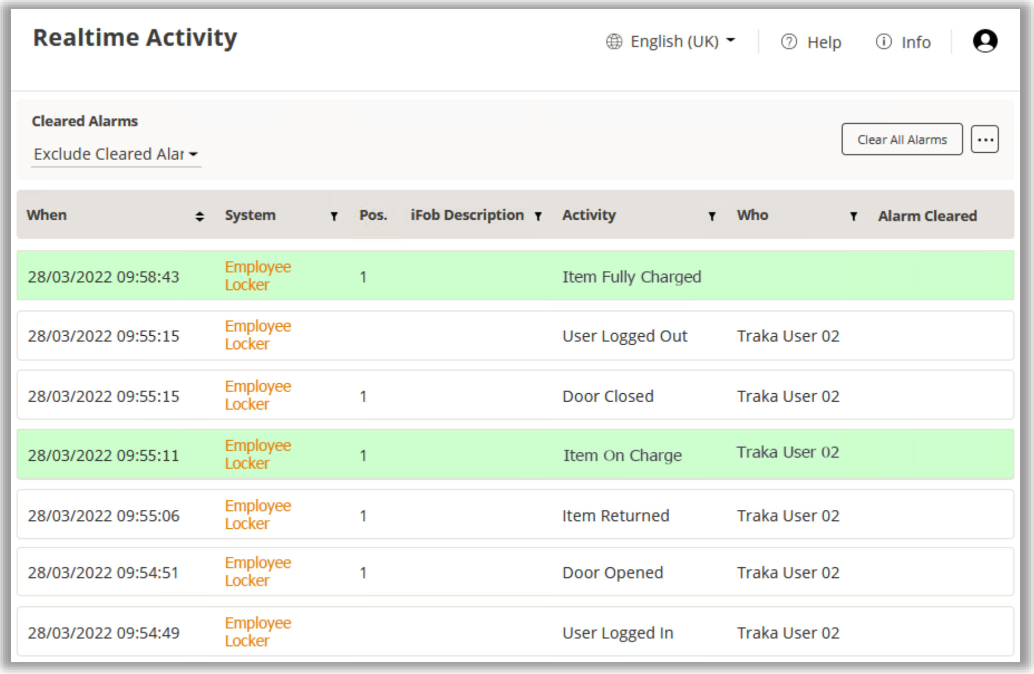
5.18.2 ACTIVITY AND REPORTS

The USB Charge Status Indication feature can generate the following activities. These will all be generated and displayed in the Item Activity grids and on Reports.

- Item On Charge
- Item Off Charge
- Item Charged
- Item In With Charge Fault
- Item In But Not On Charge
- Unidentified Item On Charge
- Unidentified Item Charged
- Unidentified Item Charge Fault
- Unidentified Item Off Charge
- USB Charger Undetectable
- USB Charger Redetectable


Item Activity

Activity	Pos.	When	Who	Fault	Smartphone ID
Door Closed	1	23/03/2022 17:11:10	Traka User 01		AAA
Item Off Charge	1	23/03/2022 17:11:01	Traka User 01		AAA
Item Fully Charged	1	23/03/2022 16:00:18	Traka User 01		AAA
Item On Charge	1	23/03/2022 13:00:18	Traka User 01		AAA
Item Returned	1	23/03/2022 13:00:18	Traka User 01		AAA


Realtime Activity

English (UK) Help Info

Cleared Alarms

Exclude Cleared Alar

Clear All Alarms

When	System	Pos.	iFob Description	Activity	Who	Alarm Cleared
28/03/2022 09:58:43	Employee Locker	1		Item Fully Charged		
28/03/2022 09:55:15	Employee Locker			User Logged Out	Traka User 02	
28/03/2022 09:55:15	Employee Locker	1		Door Closed	Traka User 02	
28/03/2022 09:55:11	Employee Locker	1		Item On Charge	Traka User 02	
28/03/2022 09:55:06	Employee Locker	1		Item Returned	Traka User 02	
28/03/2022 09:54:51	Employee Locker	1		Door Opened	Traka User 02	
28/03/2022 09:54:49	Employee Locker			User Logged In	Traka User 02	

5.19 SAGEM FINGERPRINT READER

The Sagem Fingerprint reader is an optional system that Traka implements to identify a user before allowing access to a system. With the correct operating system version and application version installed, to activate the Sagem MorphoSmart Fingerprint Reader you simply need to plug the reader in. There are no specific reader configuration options that need to set for the reader to work – it is simply plug & play.

Hardware Requirements

Sagem Reader Models

The following Sagem MorphoSmart Fingerprint Reader models are currently supported.

- MSO CBM 4MB IDENTLITE – 3000 user capacity (up to 2 fingers each) (Sagem Part no:252711976)
- Other variants have **not** been tested.

Traka Touch Operating System

For the Sagem MorphoSmart Fingerprint Reader to work with Traka Touch, the Traka Touch System must have Windows CE build version 1.9 or later installed.

NOTE: If a Traka Touch Base Board or Process Module has to be swapped for any reason, replacements might not have Windows CE version 1.9 installed as default and so please specify Windows CE version 1.9 or later when raising an RMA request!

If you connect a Sagem MorphoSmart Fingerprint Reader to a version of Windows CE less than 1.9, when you plug the reader in you get a Windows CE dialogue pop up requesting the Driver Name.

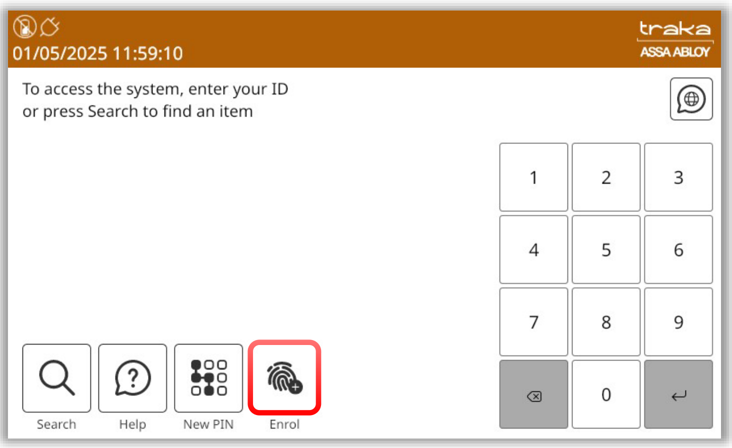
Traka Touch Application

For the Sagem MorphoSmart Fingerprint Reader to work with Traka Touch, the Traka Touch System must have Traka Touch Application version 01.02.4256.41 (07-Sep-12) or later installed.

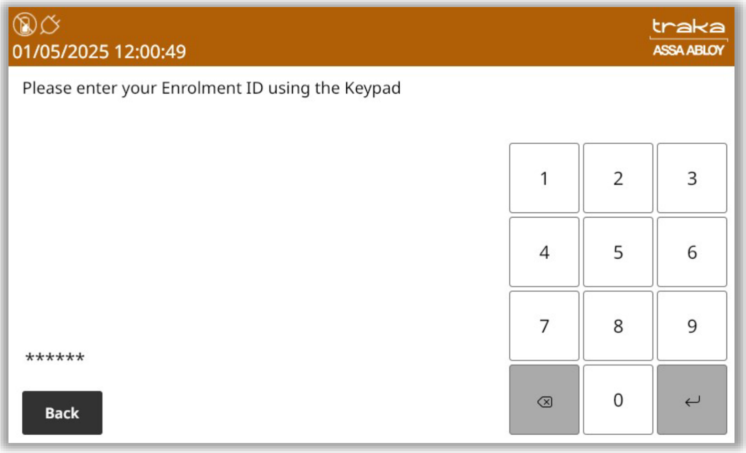
5.19.1 ENROLMENT ON TRAKA TOUCH

5.19.1.1 SELF-ENROLMENT WITH ENROLMENT ID

1. If the User has been granted an Enrolment ID by the TrakaWEB Administrator, they can access the Traka Touch system and select the Enrol option at the login screen.



2. They will be redirected to a screen where they will need to provide their Enrolment ID.



3. The system will recognize them and will enable them to scan their fingerprints. See the section below for the next steps.

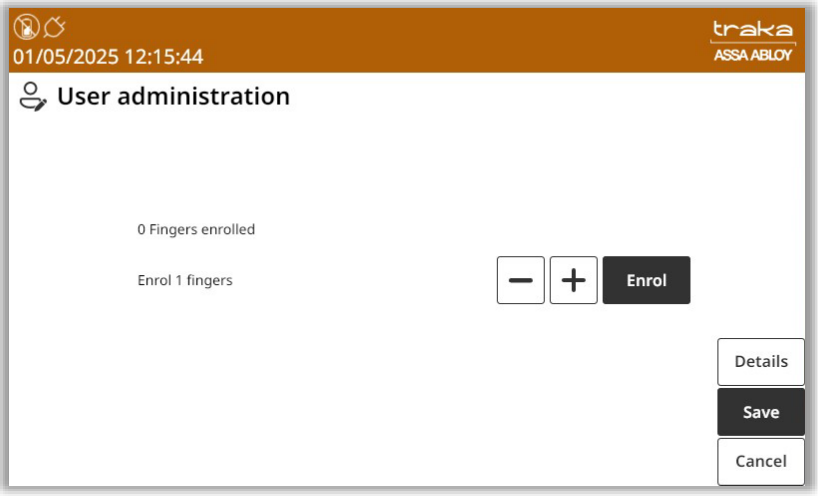
5.19.1.2 ENROLMENT BY ADMINISTRATOR

1. Once you have logged in as a Super Admin or User Admin to Traka Touch, open the **User** List and click New to create a new user record. If you already have users in the database, highlight the desired user and click the Edit button.

2. Enter the user credentials as needed and click **Access**, or if you are editing an existing user simply click Access.

3. Using the on-screen buttons, give the user appropriate access to positions in the system and/or admin and report access. If you are editing an existing user, simply click **Options**.

4. Set the active and expiry dates for the user and their PIN (if applicable) along with the item allowance, item authorisation and PIN changing options, then click **Enrol**. If you are editing an existing user simply, click Enrol.



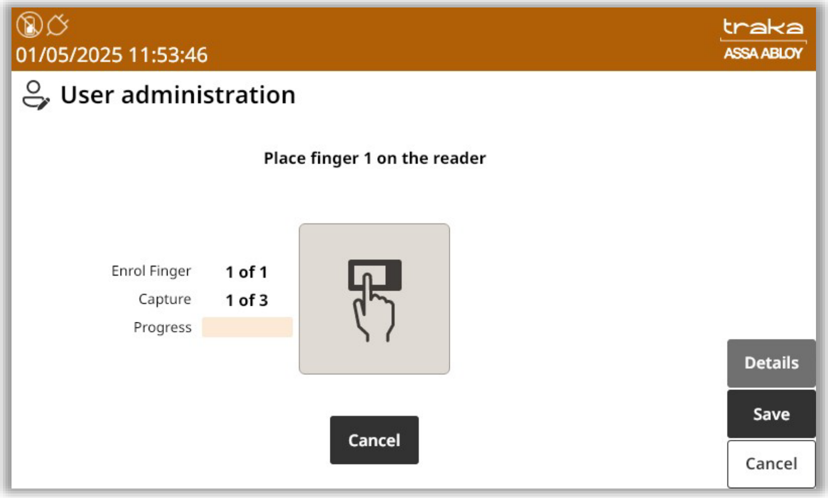
The enrolment page will show how many fingers the user currently has enrolled and will allow you to select how many fingers you wish to enrol for that user.

NOTE: You can enrol a maximum of two fingers per user.

5. When you wish to continue, click the **Enrol** button. See the section below for the next steps.

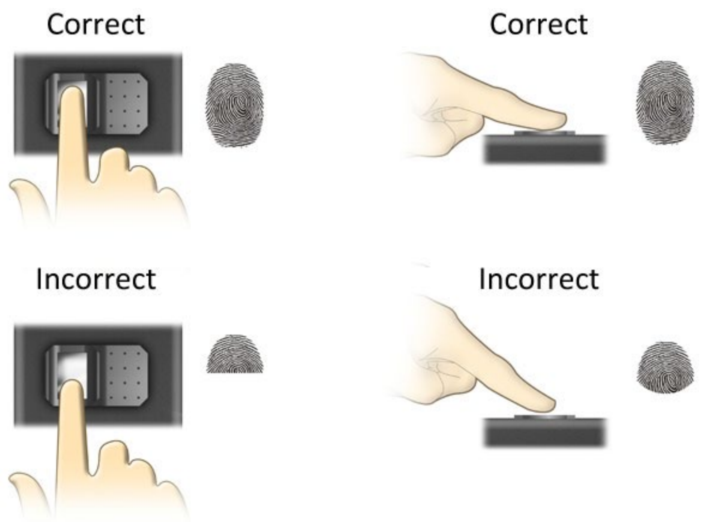
5.19.1.3 SCANNING FINGERPRINTS

1. The user will then need to place their finger onto the reader.



2. The progress meter will quickly move to 100% and they will see a fingerprint with a green tick, indicating that the capture was successful. They will need to do this three times for each finger they wish to enrol.

When enrolling, it is important to align fingers to the centre of the Enrolment Module and lay finger flat to receive accurate results.



Do not move finger when enrolling.

Do not press too hard.

Place the finger on the enrolment module. **Do not** slide **or** roll finger on and off.

NOTE: If the finger is not properly positioned, the reader may have trouble enrolling the user. If this happens, Traka Touch will prompt the user to complete one of following actions to help:

3. If the templates have been successfully captured, the message 'Finger Position OK' will be displayed.

If the user chose to enrol two fingers, then they will be prompted to place the second finger on the reader and begin the enrolment process again.

NOTE: If you choose to add a second finger to a user record after they have already enrolled with a first, they will be taken through the enrolment process from the beginning, which means they will need to enrol their first finger again.

4. Once the user has enrolled, click the Save button to be taken back to the user list. After 30 seconds, the system will synchronise with TrakaWEB, and the user details will be updated.

Re-Enrolling

If you wish to change the Fingerprint template that you have saved to the user, simply click the 'Enrol' button and go through the enrolment process again.

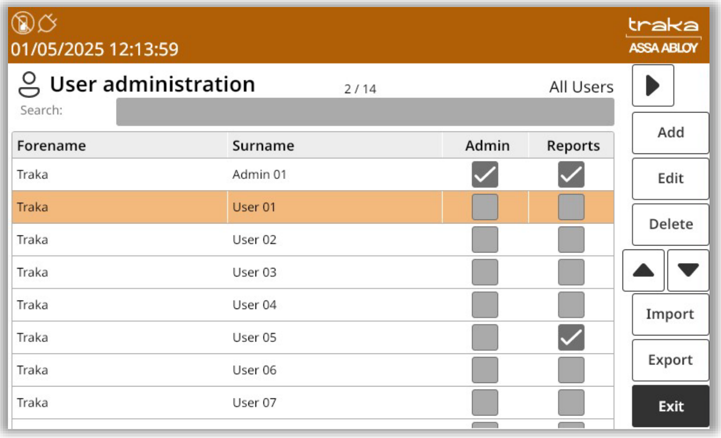
Cancel Button

By clicking the Cancel button during enrolment, you will be taken back to the enrol screen where you can select how many fingers to enrol. Doing this will erase any fingerprint templates and information from the specified user.

5.19.2 REMOVING A FINGERPRINT TEMPLATE

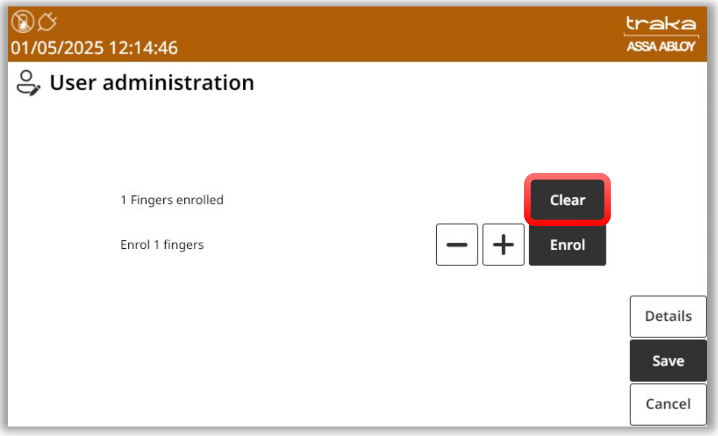
GDPR Statement: Under GDPR, the organisation must have procedures in place to enable users to withdraw their previous consent for their biometric (finger) data to be used for this process, and users must have been informed of how to initiate this process. Once consent has been withdrawn, the organisation must remove the data from the system. The user will then need a Keypad ID to access the system.

1. Log into the Traka Touch system and navigate to the User Administration page.



2. Select the enrolled user you wish to edit and navigate to the User Administration Enrolment page.

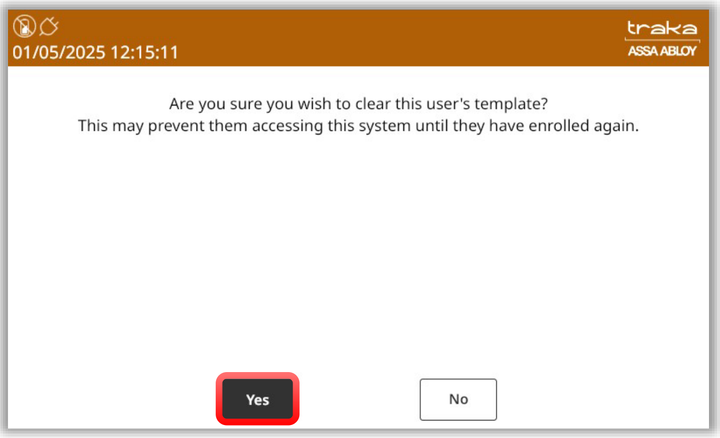
The User Administration page will now display an additional **Clear** button for an enrolled user.



3. Select the **Clear** button.

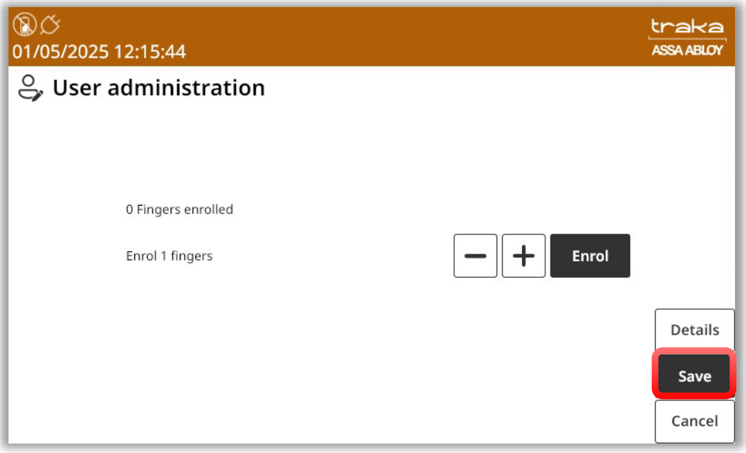
You will be presented with a message warning you that the user may no longer be able to access the system if their template is removed.

4. Select the **Yes** button.



The users' template is now removed from the database. The User Administration page will remain visible should the user require re-enrolling.

5. Once completed, select the **Save** button.



5.19.3 IDENTIFICATION

'Identification' is simply the process of the Traka system recognising a user in normal daily use. The user must be enrolled before they can do this. At the Traka System:

Fingerprint Only

1. **Touch** the screen to bring the system out of idle mode. The Sagem reader will illuminate red. This will continue until the system moves back into idle mode.
2. **Place** your finger on the reader.
3. Once your ID has been verified, you will be able to continue to remove items or make a selection.

Fingerprint and Keypad ID/Credential ID

1. **Touch** the screen to bring the system out of idle mode. The Sagem reader will illuminate red. This will continue until the system moves back into idle mode.
2. **Place** your finger on the reader or **enter** your Keypad ID/**scan** your Credential at the reader.
3. Once your Fingerprint ID and/or Keypad ID/Credential ID have been verified, you will be able to continue to remove items or make a selection.

Fingerprint and PIN

1. **Touch** the screen to bring the system out of idle mode. The Sagem reader will illuminate red, this will continue until the system moves back into idle mode.
2. **Place** your finger on the reader.
3. You will then be prompted to **enter** your PIN.

Once your Fingerprint ID and PIN have been verified, you will be able to continue to remove items or make a selection.

6. FEATURE OPTIONS

6.1 FEATURE OPTIONS OVERVIEW

Features are a powerful set of configuration options that can be tailored to suit your needs. They can be enabled or disabled through TrakaWEB Admin and can perform a highly configurable set of functions, depending on your requirements. This guide has been prepared in order to assist you with all aspects of the Feature Options available for TrakaWEB and how to use them in conjunction with your Traka Touch Key Cabinet or Locker system.

NOTE: Please refer to the Traka support site for the latest compatibility information of TrakaWEB and Traka Touch products.

http://support.traka.com

6.2 FAULT LOGGING

Fault Logging is a very powerful feature available for both Key Cabinets and RFID Locker Systems. It allows a user to record faults against items, such as vehicles or laptops. Subsequently, depending on the criticality of the fault, access can be restricted to those items to prevent further damage, wasted time or injury. An example of its use could be for a flat tyre on a vehicle.

Fault Logging can be used in 2 ways:

1. Generate and clear faults at both TrakaWEB and the Traka Touch system.

2. Generate and clear faults using TrakaWEB only.

The way in which Fault Logging is used is determined in the configuration process and will already have been set up at Traka. Should you require a change to this configuration, please contact Traka or your Distributor.

6.2.1 ENABLING FAULT LOGGING

The Fault Logging feature will need to be enabled on your Traka Touch system by loading a configuration file. This is normally done by Traka during production, but if you wish to add the feature to your existing system, please contact Traka or your Distributor for further details.

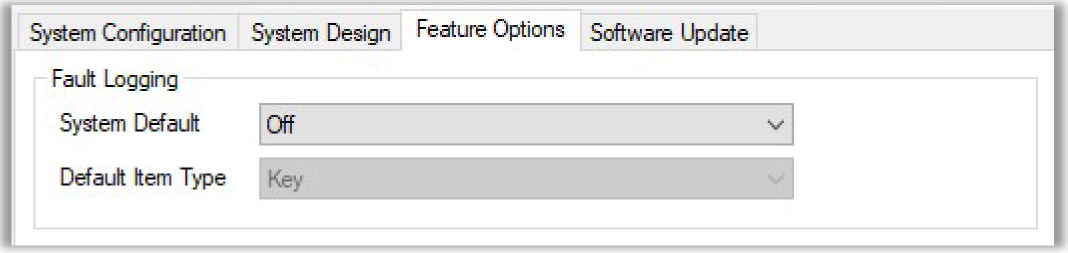
Another configuration option is ‘Allow Fault Logging at System’, which controls whether faults are able to be added at the Traka Touch by the user of the system. If this option is off, you will only be able to add faults using TrakaWEB. Traka also sets up this sub-option configuration.

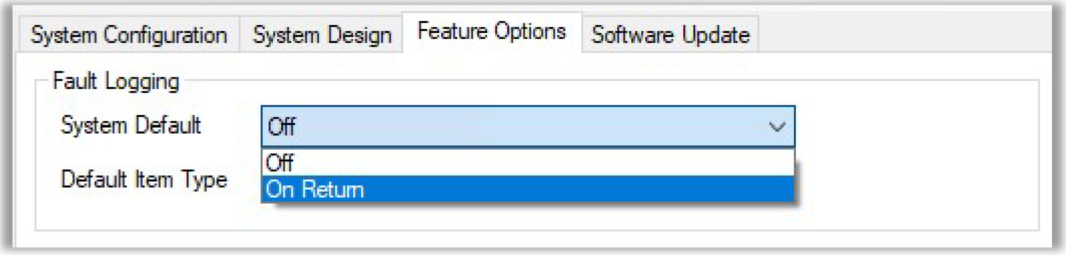
Once your Traka Touch system is configured for Fault Logging, you will need to set up additional options using the TrakaWEB Administration application, as follows:

1. Launch the TrakaWEB Admin app, expand the System Management node in the tree on the left and choose the system to be configured.

2. Select the Feature Options tab on the right and locate the Fault Logging section. Here you will find the option to set the system default logging **Off** or **On Return** for all iFobs/items in the system.

NOTE: This default can still be overridden on an individual iFob/item basis in TrakaWEB.





When Fault Logging is first switched on, all iFobs/items are set to: Fault Logging=System Default. This means that you can set all iFobs/items to ON if you change the Fault Logging system default in the Admin App to ON, or alternatively,

Requirement	Fault Logging System Default	iFobs/items
All items need Fault Logging	ON	All left at 'System Default'
Most items need Fault Logging	ON	Change iFobs/items that do NOT participate from Default to Fault Logging: OFF
Some items need Fault Logging	OFF	Change iFobs/items that DO participate From Default to Fault Logging: ON
No items currently need Fault Logging	OFF	All left at 'System Default'

set all iFobs/items to OFF if the Admin App is set to default: OFF. The table shows configurations for most scenarios:

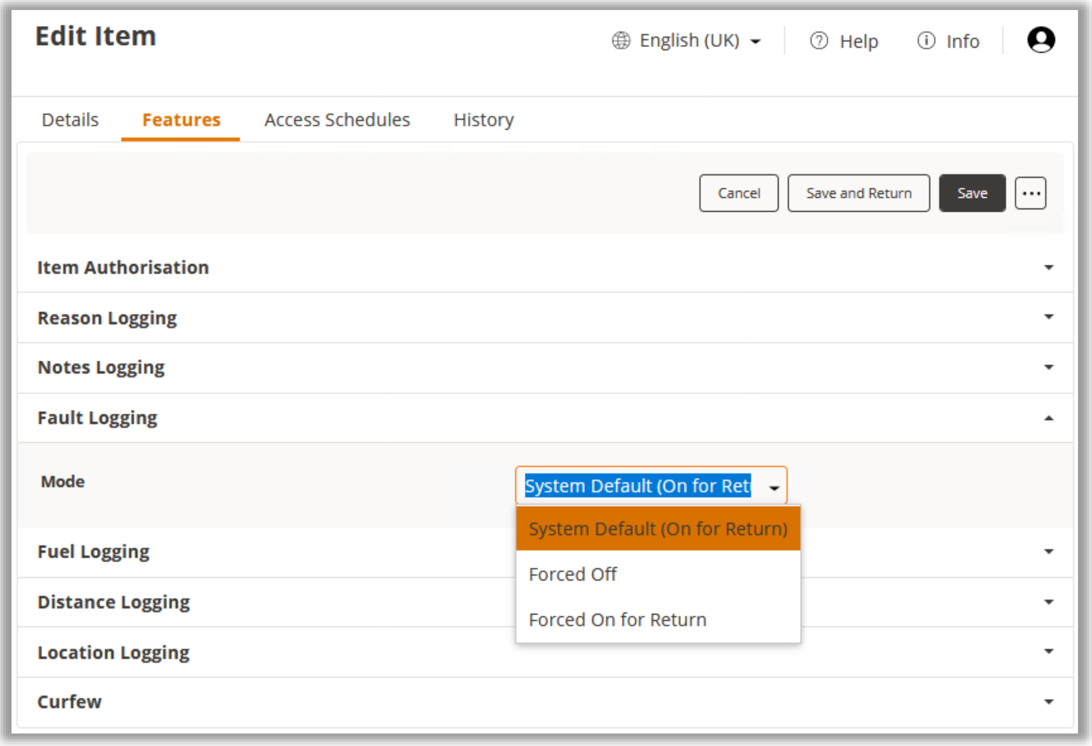
6.2.2 ENABLING FAULT LOGGING ON A PER IFOB/ITEM BASIS

NOTE: This section only applies if your system is configured to allow faults to be logged and cleared at the Traka Touch system.

It is possible to individually enable/disable the fault logging option on a per iFob/item basis.

1. From the System Viewer select the desired position and select **Edit iFob** in the upper right part of the screen.
2. Select the **Features** tab. The example here assumes that during setup the Fault Logging system default has been set to 'On'. In which case, the following 3 options are available from the Fault Logging drop down.
   - System Default (On) – the iFob/item will follow the system default setting
   - Forced Off – fault logging for this iFob/item will always be off even if the system default changes to 'ON'
   - Forced On for Return – will switch the option on for this iFob/item

NOTE: Fault logging will not operate on an iFob (RFID Tag on lockers) until it has one or more items allocated to it and the item type of those items has faults defined. Once an item is allocated, it then has an Item Type. Refer to the section Adding an Item to an iFob for more details.

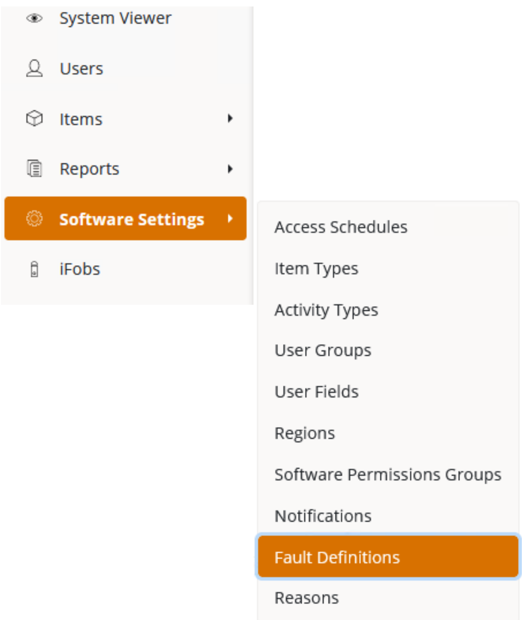


6.2.3 CREATING AND EDITING FAULT DEFINITIONS

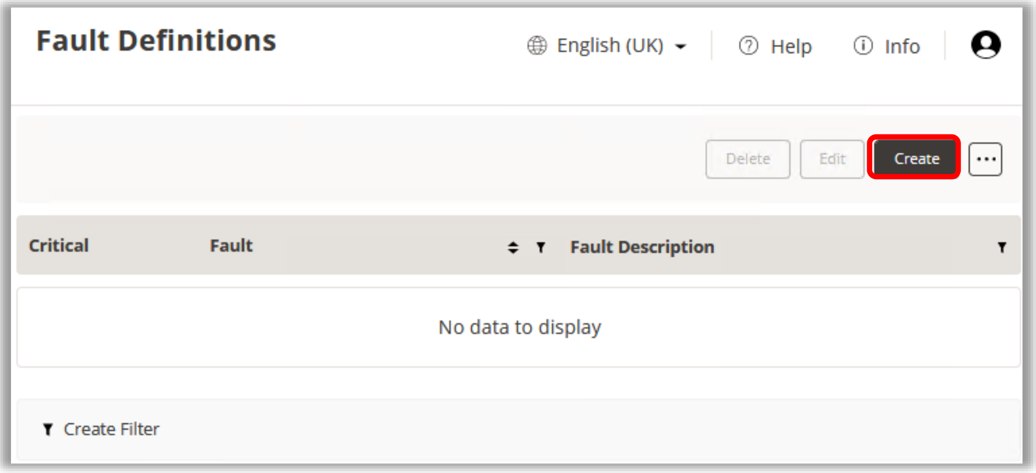
When a Fault is logged against an item, the fault type must be selected from a predefined list of Fault Definitions. These Fault Definitions may include faults such as 'Brakes Faulty', if referring to a vehicle, or 'Cracked Screen' if referring to a Laptop, and any other fault that could occur to any type of item in your system.

NOTE: To create Fault Definitions the user must first have the correct Software Permissions. Refer to the Fault Logging Software Permissions section for more details.

1. To create a Fault Definition, select **Software Settings** and then **Fault Definitions** from the Navigation Menu.

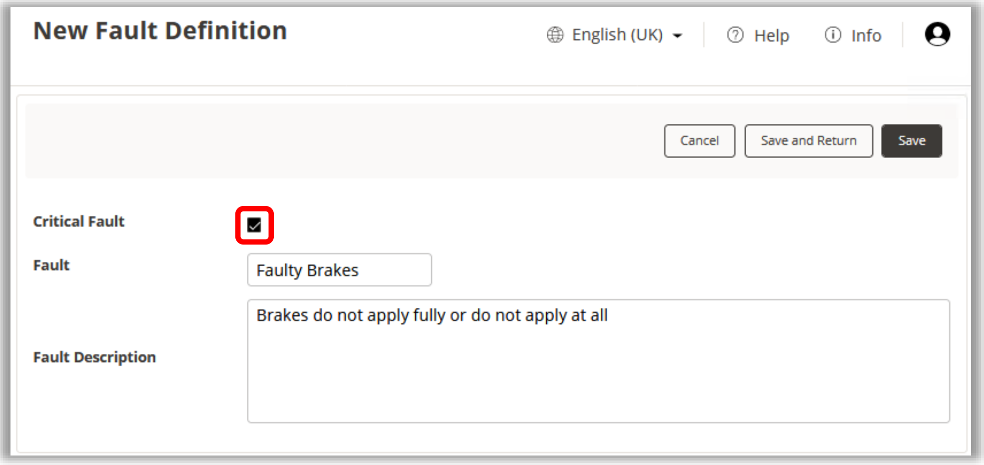


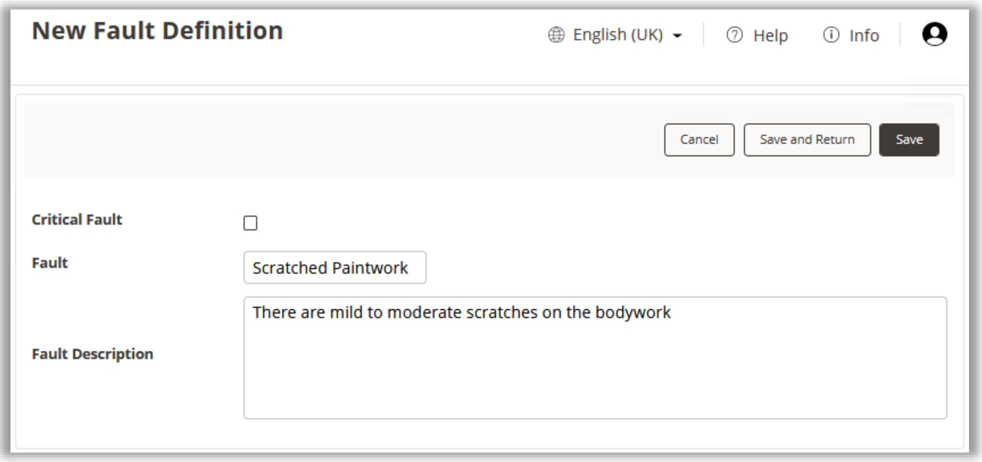
2. Click the **Create** button and the Fault Definition Details window will appear. From here, you can define a name and any additional descriptions for the fault.



You can also select whether or not the fault is a 'Critical Fault'. A Critical Fault, once logged against an item, restricts that item from being removed from the system unless the user has specific permissions. See the section Define Users That Can Take Critically Faulted Items for further details.

The following two images show examples for the creation of Critical and Non-critical Fault Definitions.



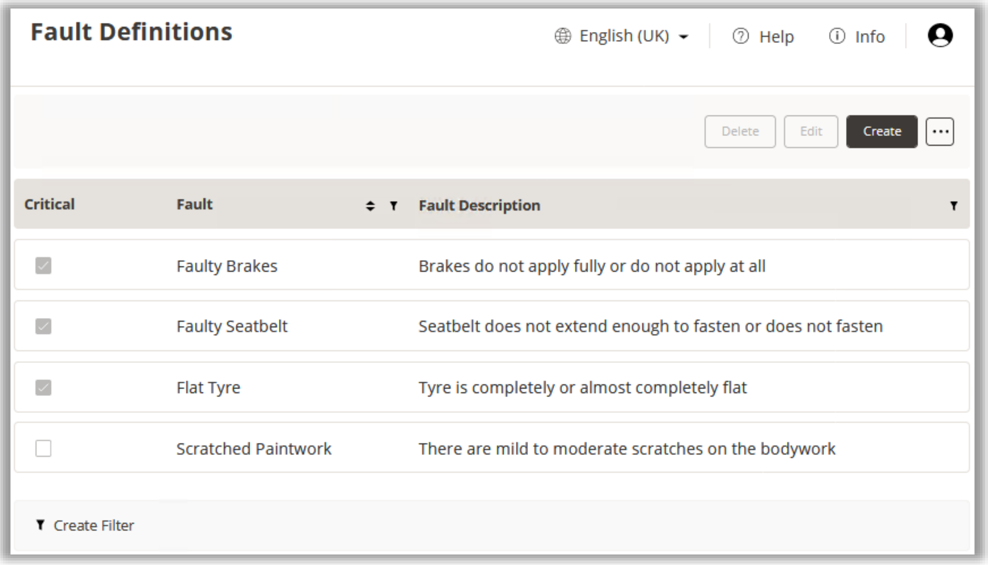


3. Once you have finished creating the Fault Definition click 'Save'. You can repeat this process for all Fault Definitions you wish to create.

To enable the Fault Definitions to be selectable when logging a fault against an item, they must be assigned to an Item Type. Refer to the section Selecting Fault Definitions for Item Types for more details.

All the Fault Definitions created will be stored in the Fault Definitions List.

From here, you can **Edit**, **Delete**, or **Create** new Fault Definitions.

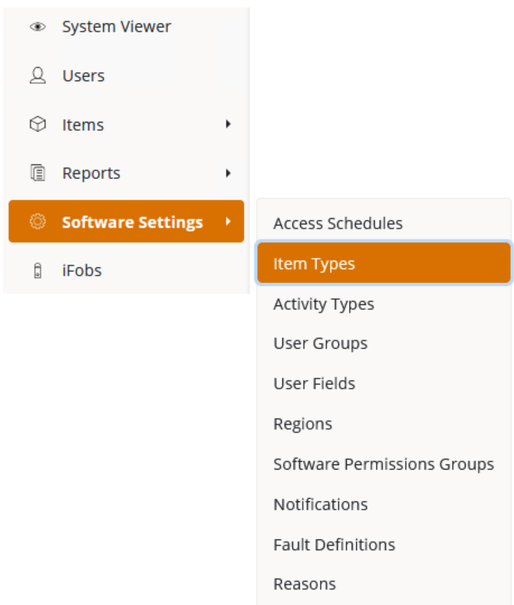


NOTE: If a user has removed an item from the system that has a 'Non-critical' fault, and that fault definition is then changed to 'Critical' in TrakaWEB, the Event Report will look like the user removed a critically faulted item without the correct permissions (if that user does not have permission to remove critically faulted items). It is best to edit the 'Critical' status of a Fault Definition when no items currently have that fault logged against them. To check all current outstanding faults, refer to the Outstanding Faults List.

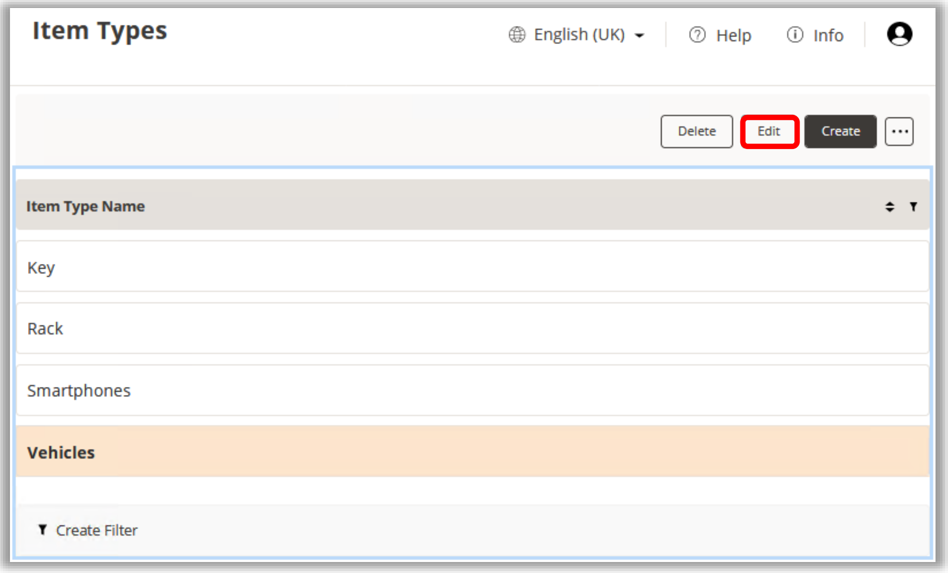
6.2.4 SELECTING FAULT DEFINITIONS FOR ITEM TYPES

In order for a Fault type to be selectable when returning an item to the system, it must first be assigned to an Item Type. Up to 20 Fault Definitions can be assigned to a single Item Type.

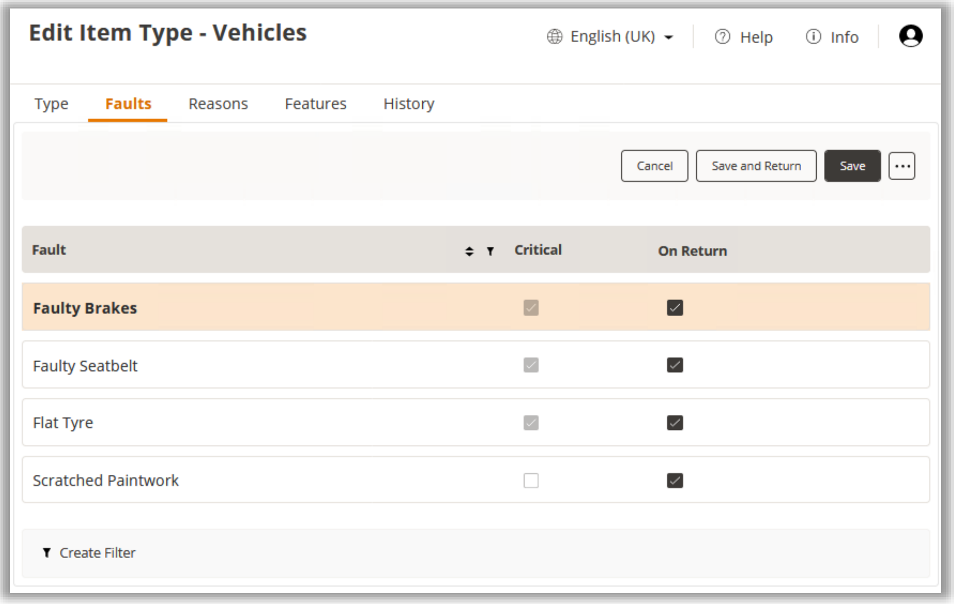
1. Select **Software Settings** and then **Item Types** from the Navigation Menu.



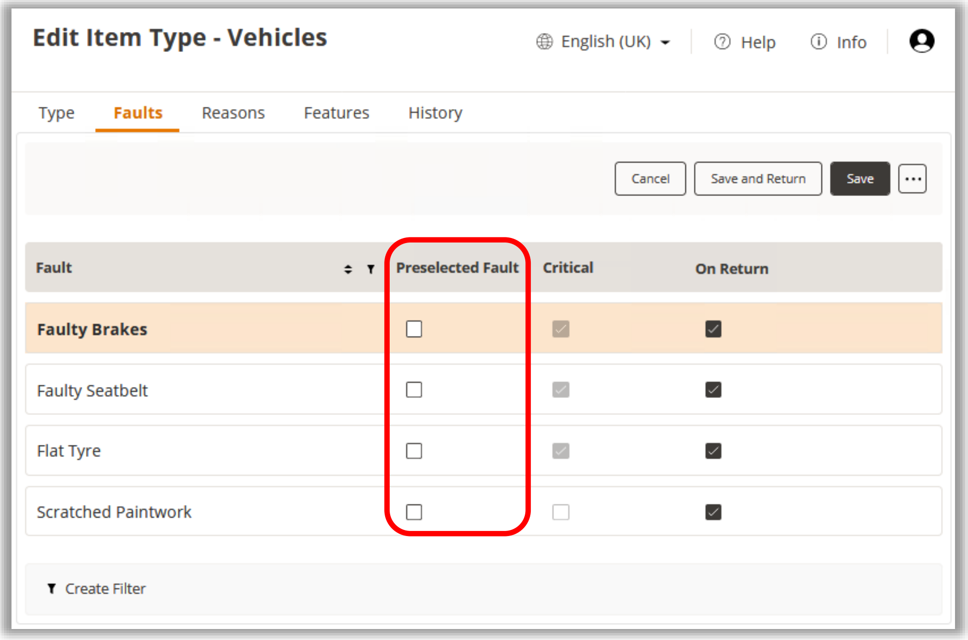
2. Select the desired Item Type and click on **Edit**.



3. Select the **Faults** tab. A list of all created Fault Definitions will be displayed here. Select the Faults that are applicable to this type of item by ticking the corresponding box in the **On Return** column.



4. The Preselected Fault column can be added in from the custom columns. This option allows you to select a Fault Definition that will automatically be selected upon the return of an item of that type. Only one preselected fault can be selected for each item type.

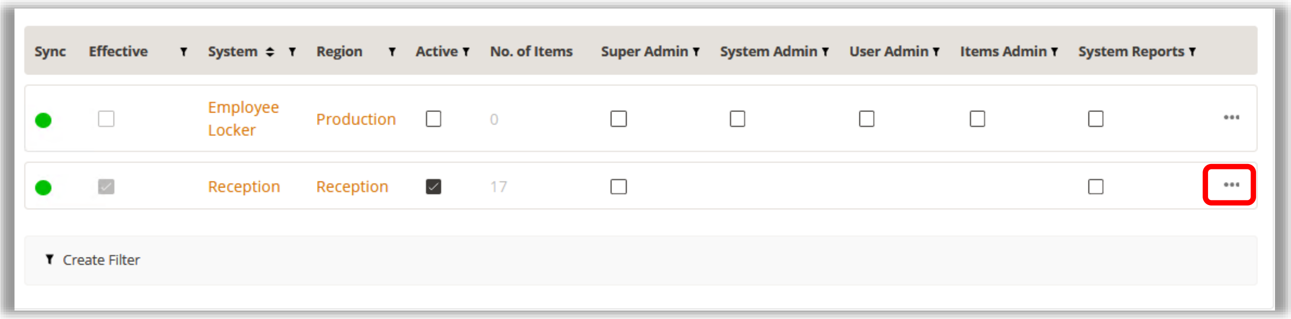


NOTE: See [Show/Hide Grid Columns] for details on how to show custom columns.

6.2.5 DEFINE USERS THAT CAN TAKE CRITICALLY FAULTED ITEMS

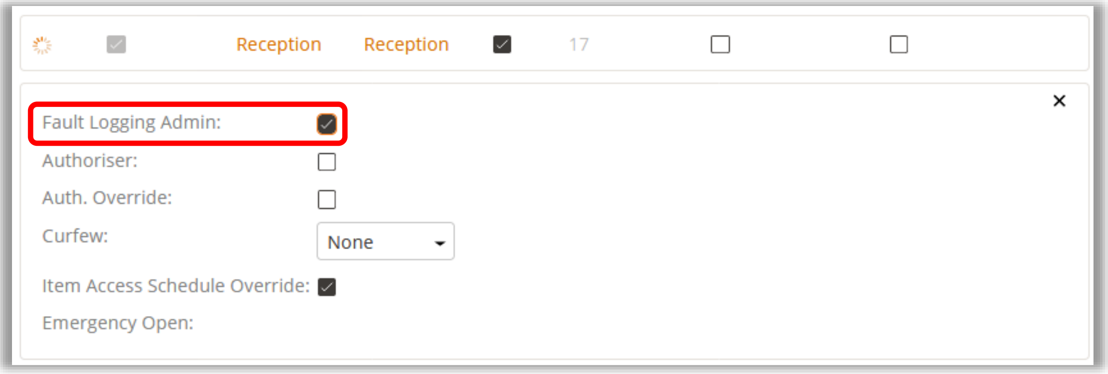
In order for a user to be able to take an item that has had a critical fault logged against it, the user must first be given Fault Logging Admin permissions.

1. Select **Users** from the Navigation Menu.
2. Highlight the user you wish to give Fault Logging Admin permissions to and select **Edit**.
3. Select the **System Access** tab. In the system list grid at the bottom of the page find the system for which you want the user to have Fault Logging Admin permissions. Click on the **Ellipsis** symbol to the right of that system's record.



4. A new panel will open where you will find a Fault Logging Admin checkbox. Tick the box.

NOTE: The user must also have been granted access to the item in order to take out a critically faulted item (this includes RFID tags in lockers).



NOTE: If a user, who has the Fault Logging Admin permissions, needs to access a faulty item and repair it, and the system they are accessing is either a FIFO or Advanced FIFO system, that user also needs to have FIFO Override permissions in order to get to the required item. For more information, refer to UD0232 - FIFO and Advanced FIFO User Guide.

6.2.6 RETURNING AN ITEM WITH A FAULT

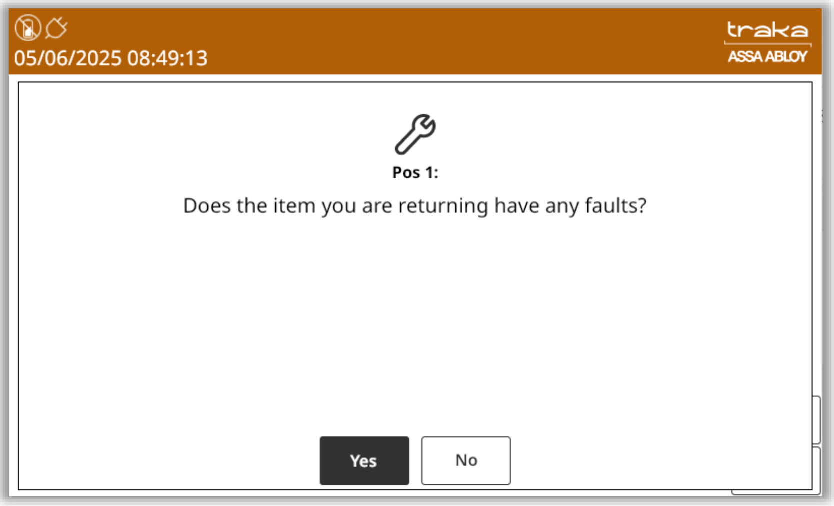
NOTE: This section only applies if your system is configured to allow faults to be logged and cleared at the Traka Touch system.

When returning an item with a fault to a Locker System, the user will be required to enter any fault details before being granted access to the locker compartment.

NOTE: The fault will not be logged if the item is not returned to the locker compartment when the door is closed, even after the user has entered any fault details. The fault details will not be saved if the item is not actually returned.

NOTE: Should a situation arise where the tag cannot be read, or the item is damaged to the extent that it will not physically fit in the locker, the fault must be logged at TrakaWEB against an empty locker compartment. Please refer to the Creating Faults Using TrakaWEB section for more information.

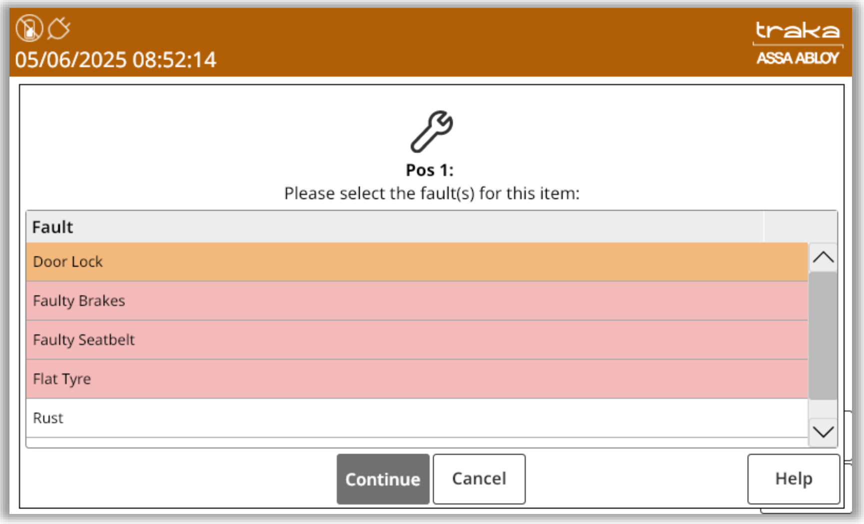
When returning an item that has Fault Logging enabled, if the item does not have any existing faults, you will be presented with the following screen:



Pressing '**No**' will skip the fault selection screen and return to the item selection screen.

If the Auto Timeout expires on this screen, the cabinet door is closed (on key cabinets) or the user otherwise logs out, this will skip the fault selection screen and return to the item selection screen.

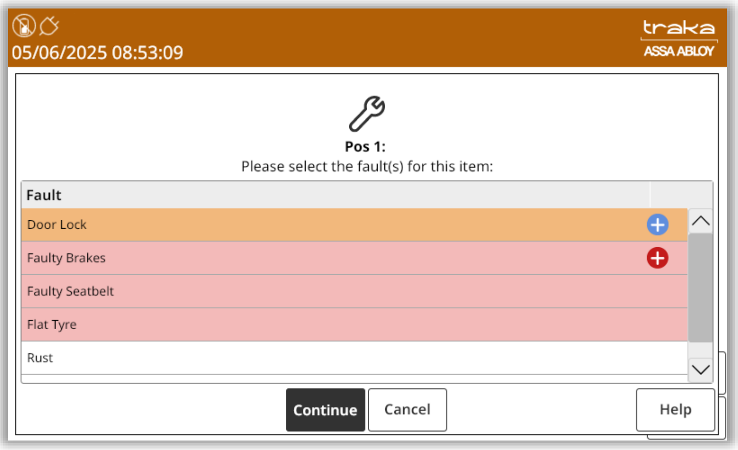
If you choose 'Yes' to select faults, you are presented with the following screen:



A list of the predefined Fault Definitions for the item type being returned is displayed here. Clicking the rows toggles them between unselected and selected. The icon on the right will indicate with a plus sign which faults have been chosen. Up to 20 faults may be shown in the list against an item.

If a preselected fault has been nominated and the item does not have any existing faults, then this preselected fault will be automatically selected and displayed at the top of the list.

Critical faults will be shown with a light red background colour and red icon; non-critical faults will be displayed on a white and grey background with a blue icon as shown below.



Once any faults have been chosen, clicking '**Continue**' will accept the new fault(s) and the system will generate a 'Fault Entered' event and create an Outstanding Fault record for each one chosen.

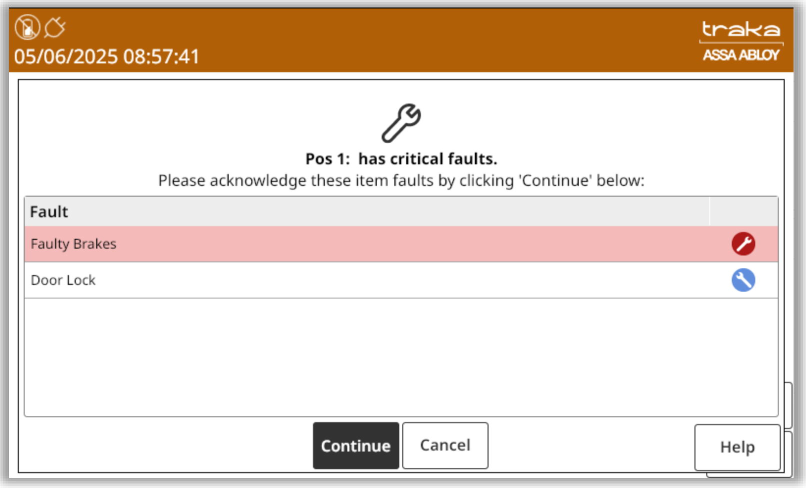
If the Auto Timeout expires on this screen or the cabinet door is closed (on key cabinets) or the user otherwise logs out, a Fault Not Entered event will be generated.

6.2.7 REMOVING A FAULTY ITEM

Any user can remove items with non-critical faults providing they have been granted access to that item in the usual way.

Items with one or more critical faults can only be taken by users who have Fault Logging Admin permissions selected in their user record.

In either case, if an item with faults is requested (or just taken from a non-locking system), the user will have to acknowledge any faults as follows:



Clicking '**Continue**' will generate a 'Fault Acknowledged' event for each fault in the list.

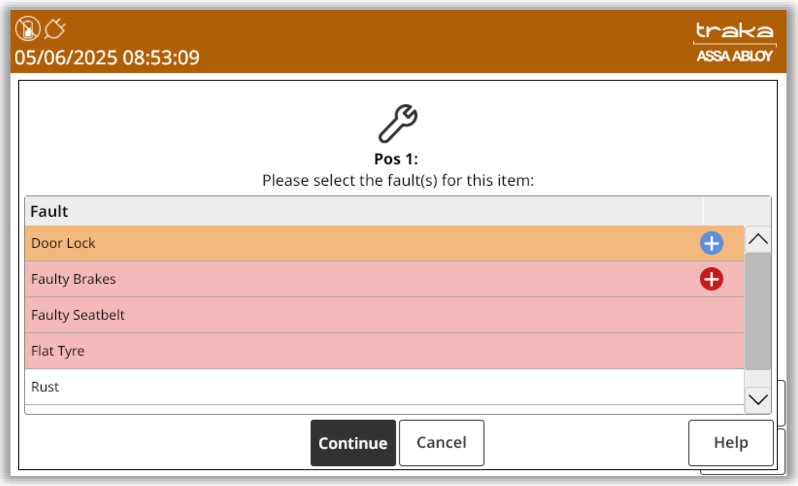
On a non-locking Key Control system or a Locker system where the door is already open, if the user removes the item and the user clicks the 'Cancel' button, the system will generate a 'Fault Not Acknowledged' event for each fault in the list.

On a locking Key Control system or if the door is not open on a Locker system, clicking 'Cancel' or timing out will result in the item not being released or the door not being opened on a locker system.

6.2.8 CLEARING AND ADDING ADDITIONAL FAULTS AT TRAKA TOUCH

NOTE: This section only applies if your system is configured to allow faults to be logged and cleared at the Traka Touch system. Refer to the section Enabling Fault Logging for more details.

If a faulty item is taken out of the system by an authorised person and then returned (perhaps after some repairs have been carried out), the system will show the fault list with any outstanding faults indicated at the top. The 'Does the item have any faults' question will not be asked in this case.



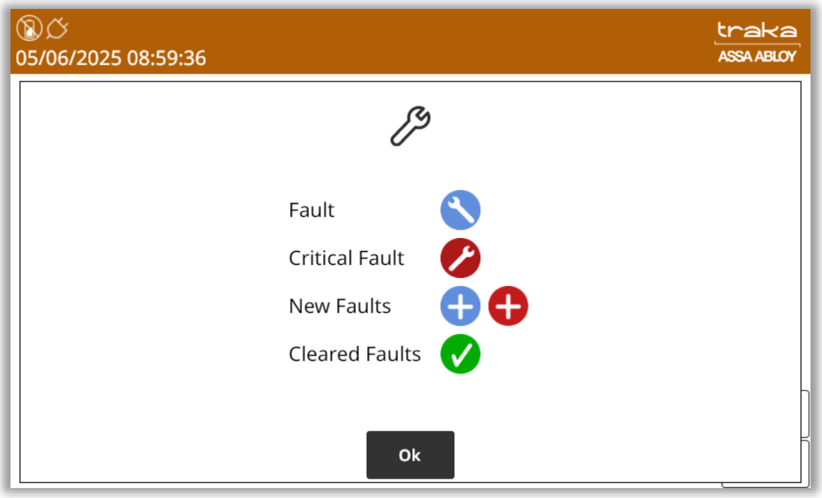
You then have three options as follows:

1. **Clearing**: Existing faults can then be cleared by just clicking them in the list. For each fault deselected, the fault list icon will include a green tick to indicate its cleared status. When the 'Continue' button is pressed you will be asked to enter optional notes for each of the cleared faults in turn. See below for details.

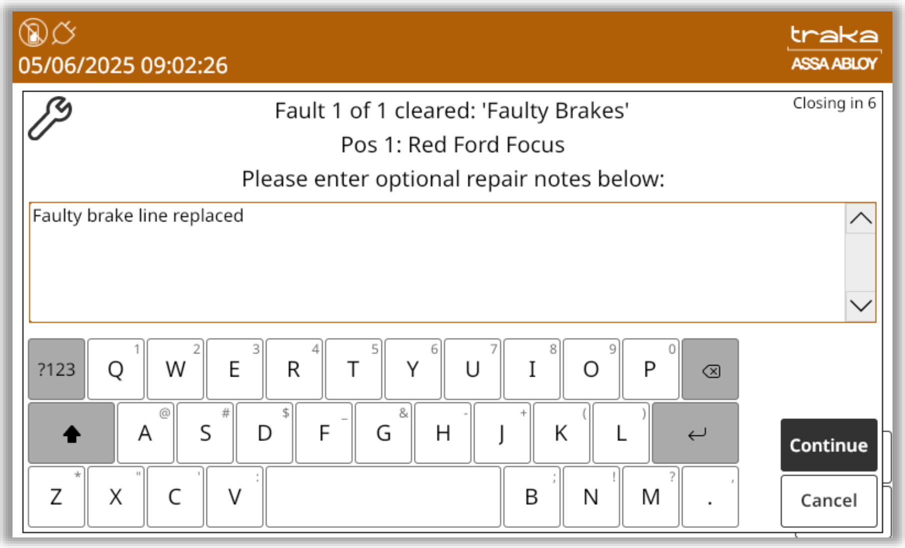
2. **Adding**: If, for example, more faults are found when physically repairing a reported fault, more faults can be added by selecting additional rows. For each fault added, the system will generate additional 'Fault Entered' events and create new Outstanding Fault records.

3. **No change**: Accept that the existing faults have not changed by doing nothing else except pressing the 'Continue' button.

Clicking the 'Help' button will present you with the following screen:



For option 1, the below screen is presented for each cleared fault allowing you to enter optional repair notes. Any existing fault notes that may have been entered from TrakaWEB will also be displayed here.



Clicking '**Apply All**' will assign the same entered notes to all of the cleared faults.

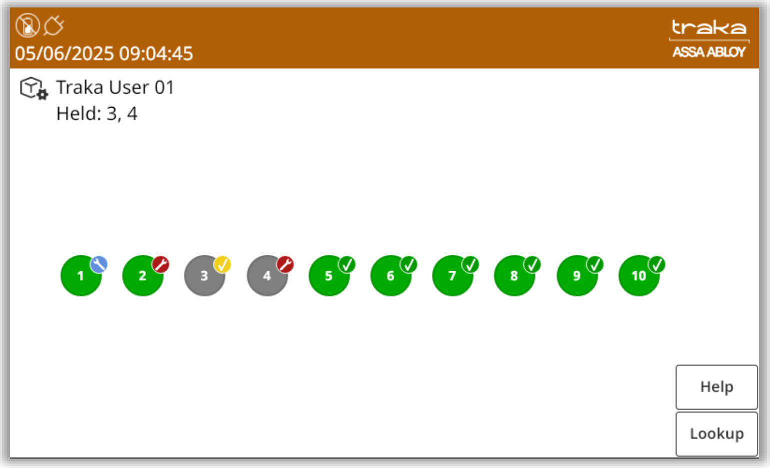
Clicking '**Continue**' will save the entered notes and either move on to the next cleared fault or continue to the next feature questions (if applicable).

If '**Cancel**' is pressed, the notes being edited will not be saved, the displayed fault and any remaining faults selected to be cleared will not be cleared and will remain on the item. If 'Cancel' has been pressed by mistake, remove and return the item(s) to repeat the process.

Once finished, a 'Fault Cleared' event will be generated for each one, and the entered notes will be updated in the appropriate fault records in TrakaWEB.

6.2.9 ITEM SELECTION SCREEN WITH FAULTS

This is an example of how the Item Selection Screen might look on a system with Fault Logging enabled:



Position 1:  - Item in with one or more critical faults

Position 2:  - Item in with one or more non-critical faults

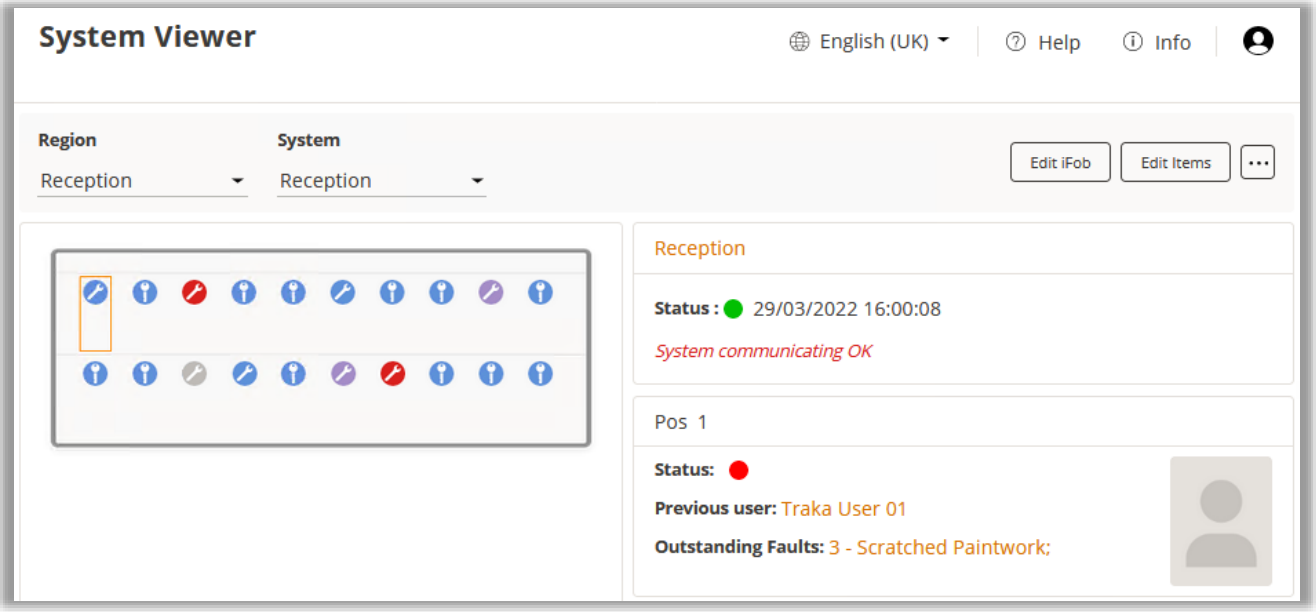
Position 3:  - Item held with one or more critical faults

Position 4:  - Item held with no faults

Position 5:  - Item in with no faults

6.2.10 SYSTEM VIEWER FAULT DISPLAY

This is an example of the system viewer within TrakaWEB showing the different fault statuses. When you select a position that has faults entered against it, the item status panel will show up to five fault names. Clicking any fault hyperlink will take you to the corresponding fault record page.



The Icons and their meanings are shown below:

 - White spanner on blue background: Item is in and has one or more faults. No critical faults are present.

 - White spanner on red background: Item is in and has one or more faults and at least one is a critical fault.

 - White spanner on purple background: Item is in, and has all faults marked as 'repaired' but not 'cleared'.

 - White spanner on grey background: Item is out and has one or more faults. No critical faults are present.

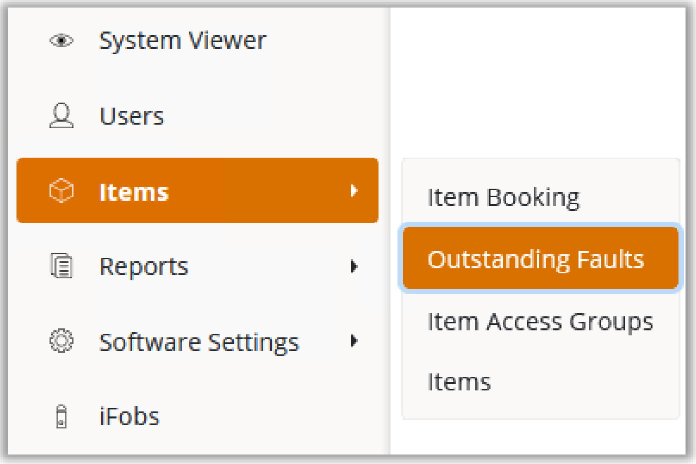
 - White spanner on grey background: Item is out and has one or more faults and at least one is a critical fault.

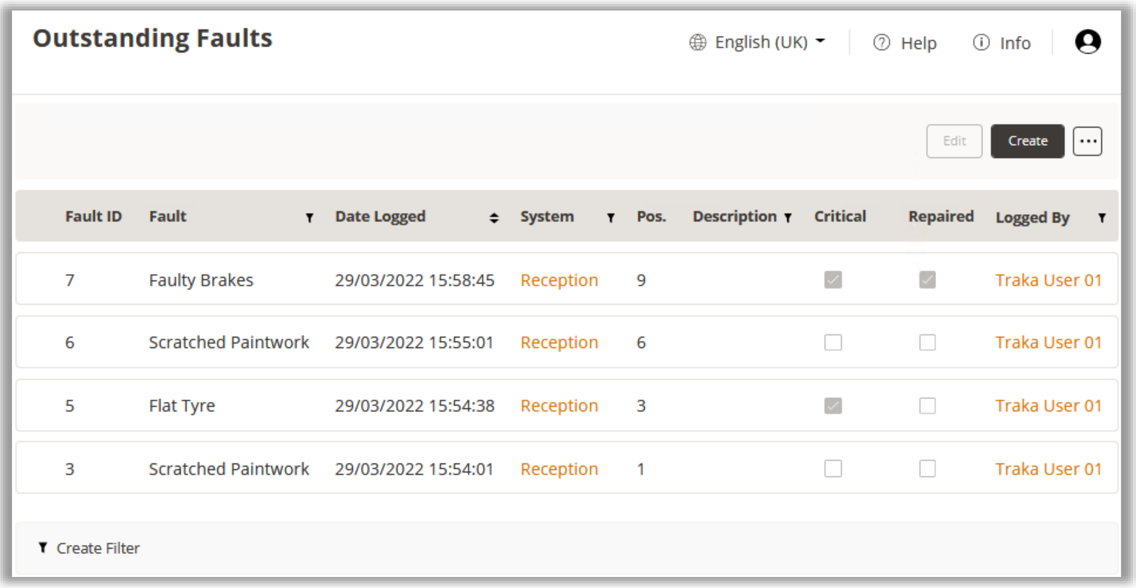
 - White spanner on grey background: Item is out, and has all faults marked as 'repaired' but not 'cleared'.

NOTE: 'Out' fault statuses are only shown on Fixed Return systems.

6.2.11 OUTSTANDING FAULTS LIST

The Outstanding Faults List can be found by selecting **Items** and then **Outstanding Faults** from the Navigation Menu.





The example above shows the default columns that are presented in the Outstanding Faults List. These include details such as who logged the fault and when, the system and position number, the fault name and whether or not it is a critical fault, and if the fault has been repaired.

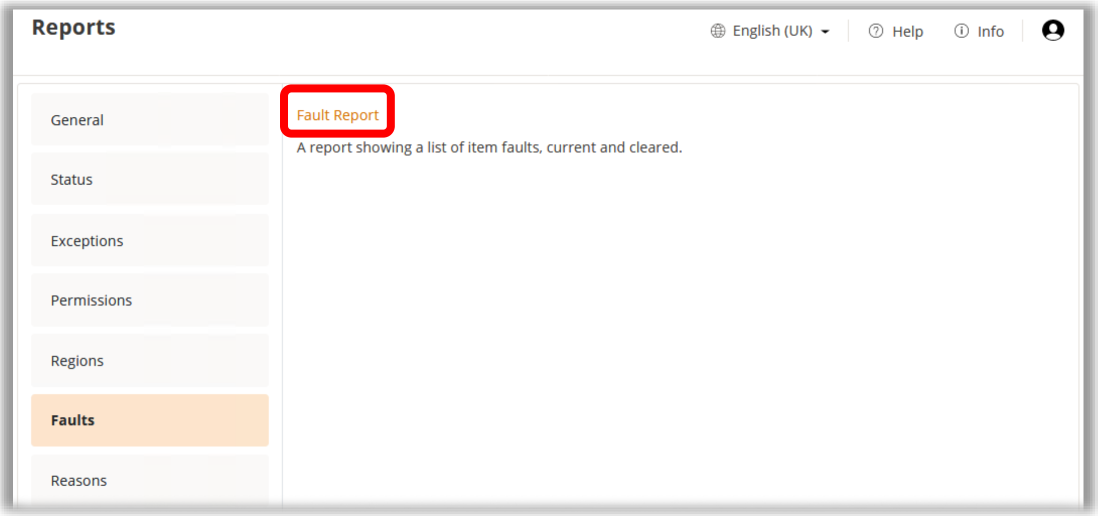
Optional columns can be added using the Show/Hide Grid Columns feature. These include:

- Fault Definition Long Description
- Item Detail 1-11
- User Detail 1-11
- Repaired By
- Repaired Date

NOTE: There is no option to delete a fault. Faults will no longer show when they are cleared.

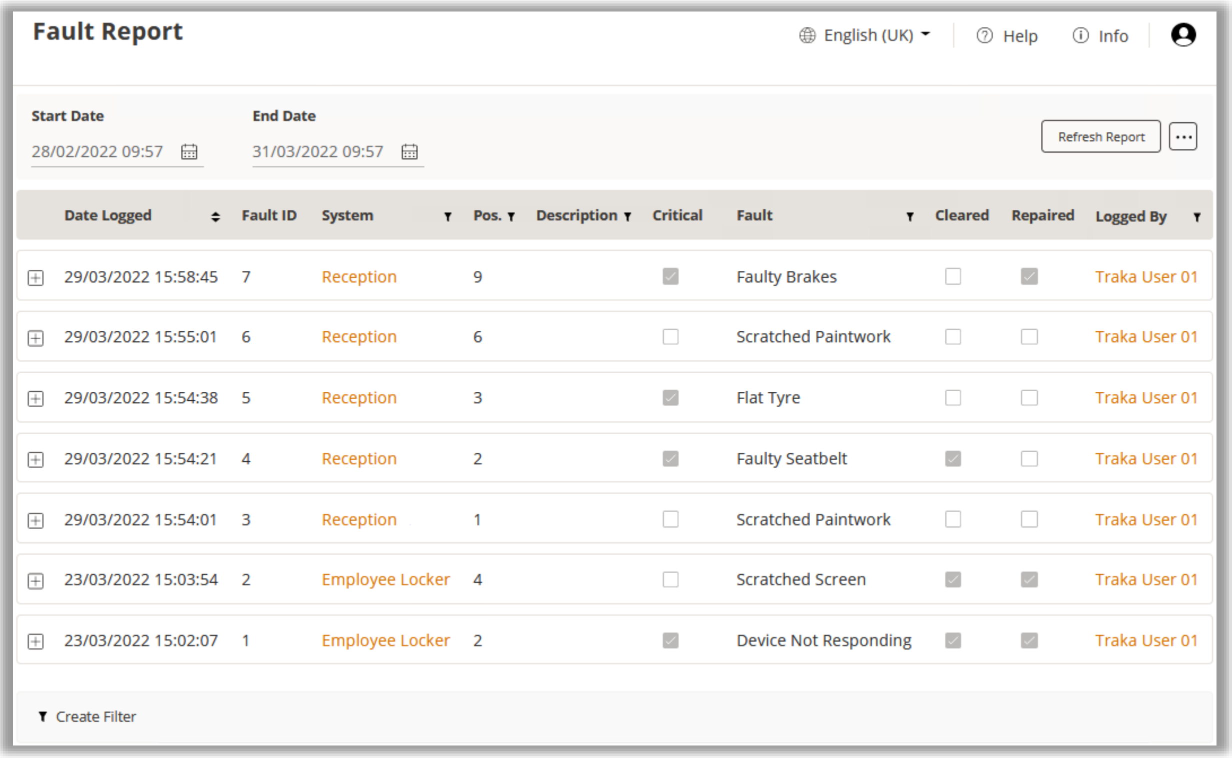
6.2.12 FAULT REPORT

To access the Fault Report, select **Reports** and then **View Reports** from the Navigation Menu; then select **Faults** and you will find the **Fault Report**.



The Fault Report shows 'cleared' faults as well as outstanding faults. Various default columns are displayed containing information about each fault, including any repair notes that may have been entered when the fault was cleared. Optional columns can also be added. These include:

- Fault Definition Long Description
- Item Detail 1-11
- User Detail 1-11
- Repaired By
- Repaired Date



Date Logged	Fault ID	System	Pos.	Description	Critical	Fault	Cleared	Repaired	Logged By
29/03/2022 15:58:45	7	Reception	9		☑	Faulty Brakes	☐	☑	Traka User 01
29/03/2022 15:55:01	6	Reception	6		☐	Scratched Paintwork	☐	☐	Traka User 01
29/03/2022 15:54:38	5	Reception	3		☑	Flat Tyre	☐	☐	Traka User 01
29/03/2022 15:54:21	4	Reception	2		☑	Faulty Seatbelt	☑	☐	Traka User 01
29/03/2022 15:54:01	3	Reception	1		☐	Scratched Paintwork	☐	☐	Traka User 01
23/03/2022 15:03:54	2	Employee Locker	4		☐	Scratched Screen	☑	☑	Traka User 01
23/03/2022 15:02:07	1	Employee Locker	2		☑	Device Not Responding	☑	☑	Traka User 01

6.2.13 CREATING FAULTS USING TRAKAWEB

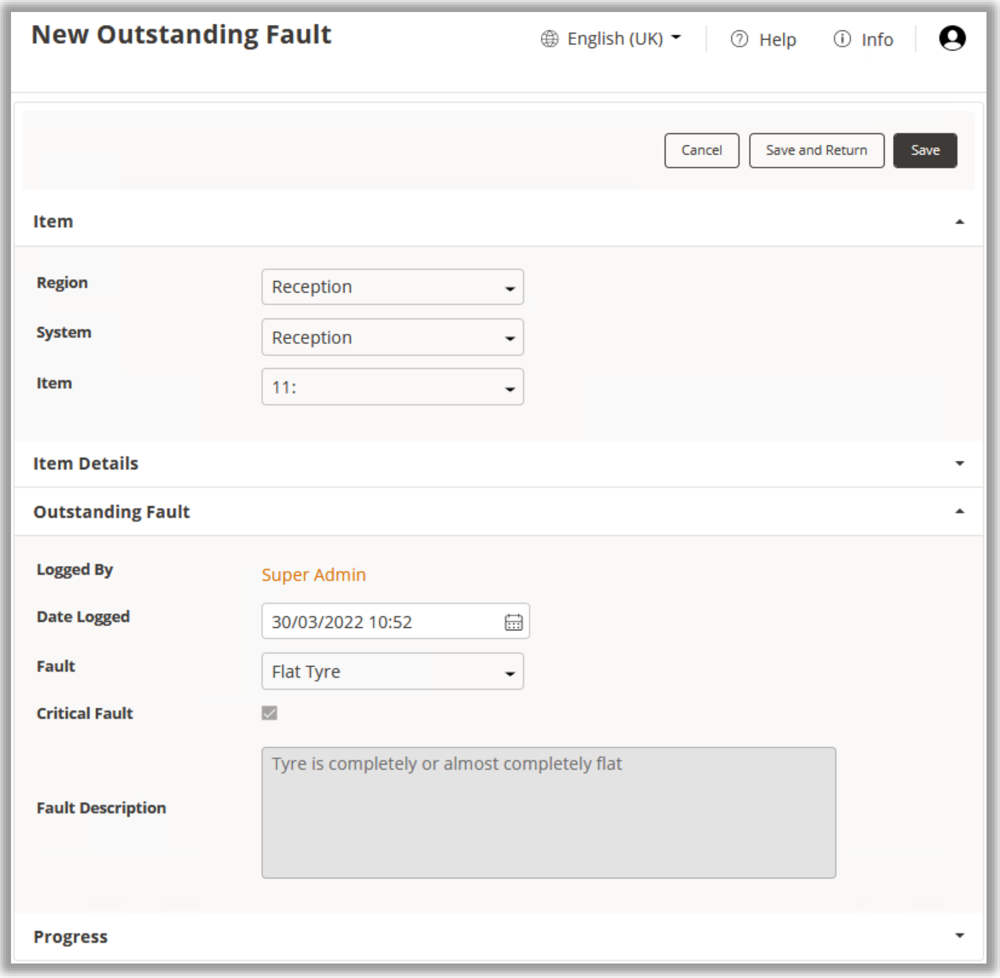
NOTE: TrakaWEB users must have the correct permissions in order to create faults using TrakaWEB. Refer to the section Fault Logging Software Permissions for further details.

NOTE: When returning an item to a locker, the fault must be registered at Traka Touch before the door will open, allowing access to the compartment. If the item is not returned to the compartment, Traka Touch will not record the fault. So, in the situation where the RFID tag cannot be read, or the item is damaged to the extent that it will not fit in the compartment, the fault must be registered at TrakaWEB.

1. To create a Fault within TrakaWEB, select **Items** and then **Outstanding Faults** from the Navigation Menu.

2. Click the **Create** button in the upper right corner of the screen.

3. You will see 4 expandable panels: Item, Item Details, Outstanding Fault, and Progress. Using the dropdown boxes in the **Item** panel, select the Region, System, and Item you wish the fault to apply to. Once the item has been selected, a list of possible faults will be available to choose from in the Outstanding Fault panel. Select the fault you wish to add from the list.



4. Enter any fault/repair notes in the Notes field in the **Progress** panel.

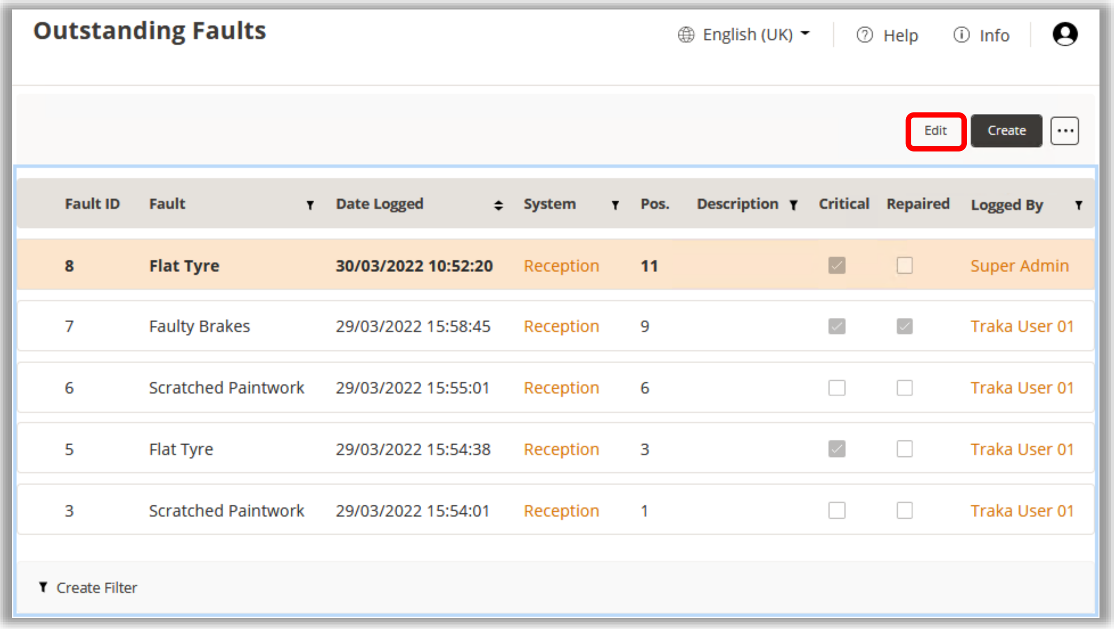
5. Once complete, click **Save** at top of the screen.

6.2.14 EDITING AND CLEARING AN OUTSTANDING FAULT

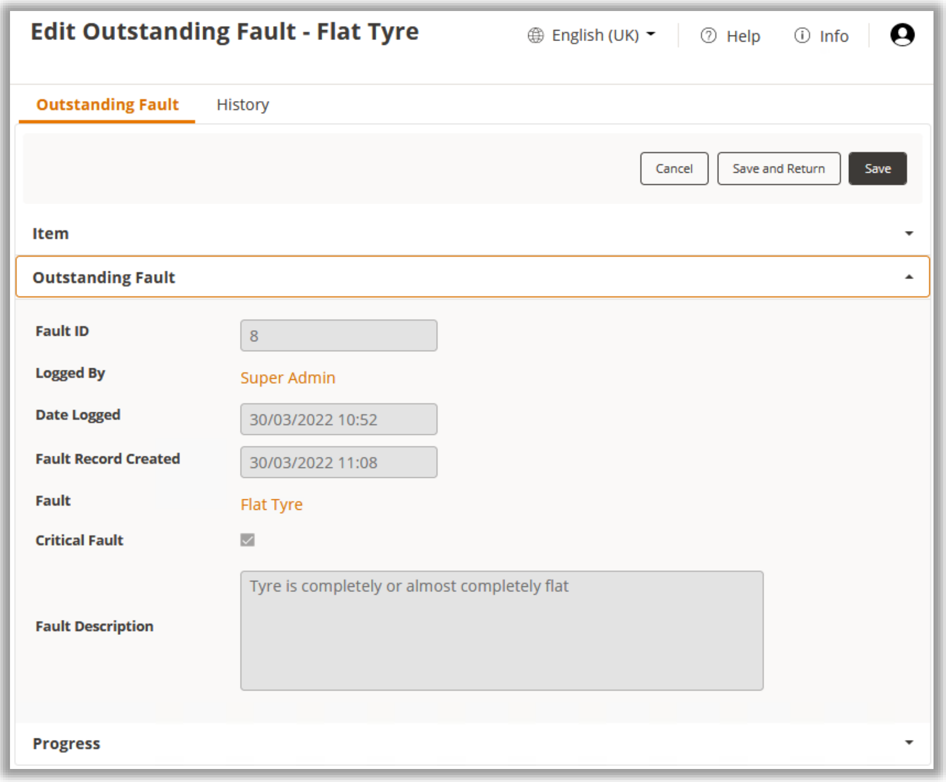
Outstanding faults may be edited and optionally marked as repaired and/or cleared in TrakaWEB.

Once cleared, the fault will no longer appear in the Outstanding Faults List but can be seen in the Fault Report.

1. To edit an outstanding fault, select **Items** and then **Outstanding Faults** from the Navigation Menu.
2. Highlight the desired fault and click on **Edit**.



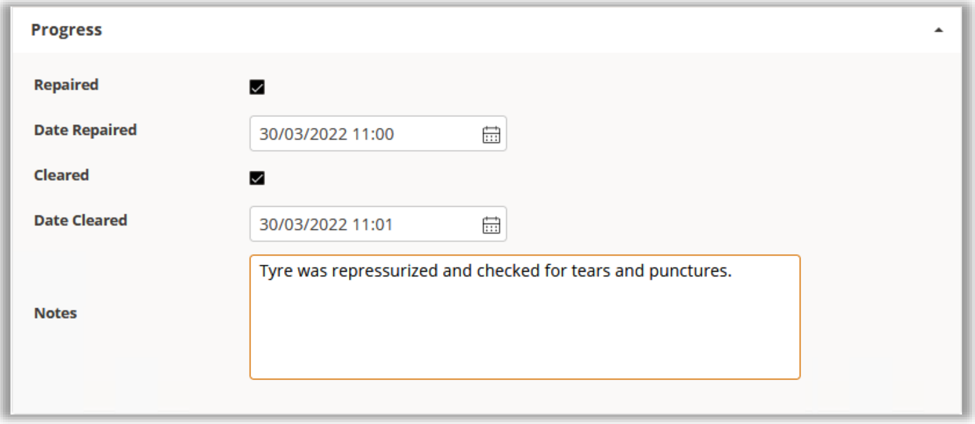
3. A window will appear displaying various details for the selected Fault in three panels: Item, Outstanding Fault, and Progress.



4. Expanding the **Progress** panel will reveal options to update the status of the fault as 'Repaired' or 'Cleared' and also enter a date and time using the drop-down calendar. You can also enter notes for the progress of the Fault.

If you select 'Repaired', the Fault will remain in the Outstanding Faults List but the icon in the System Viewer will change to highlight the fault has been repaired.

If you select 'Cleared', the fault will be removed from the Outstanding Faults List and the icon in the System Viewer will show no faults. The fault record will still be visible in the Fault Report.



Users must have the correct software permissions to be able to select the Fault Cleared or Fault Repaired tick boxes. Without these permissions, the tick boxes will be read only. Please refer to the section Fault Logging Software Permissions for further details.

NOTE: The Fault Repair functionality using the 'Repair' tick box is currently only available using TrakaWEB. The 'Repaired' status cannot be viewed or modified on the Traka Touch.

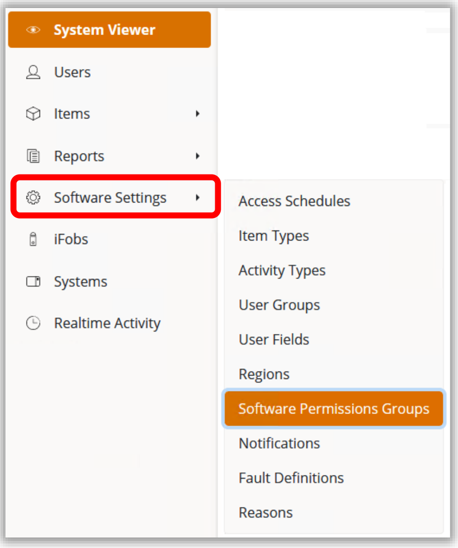
6.2.15 FAULT LOGGING EMAIL NOTIFICATIONS

In addition to creating and viewing faults in TrakaWEB, it is also possible to create a notification using the email Notification Feature Option. For more information on email notifications, refer to the Email Notifications section in this document.

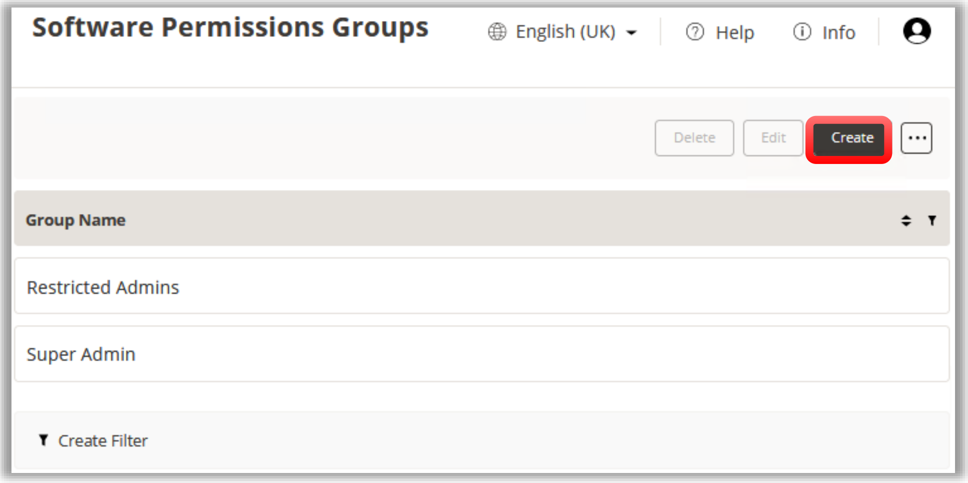
6.2.16 FAULT LOGGING SOFTWARE PERMISSIONS

To enable a user to create, edit and delete Fault Definitions, or to create/edit and repair/clear faults, they must be given the correct software permissions.

1. Select **Software Settings** and then **Software Permissions Groups** from the Navigation Menu.

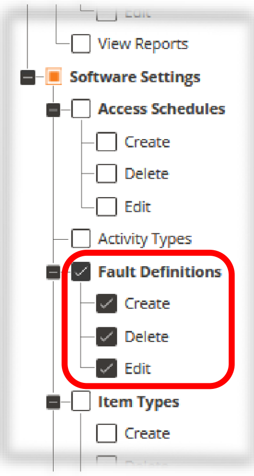


2. Either edit an existing group you wish to give permissions to by selecting the group and clicking 'Edit' or alternatively create a new group by clicking the **Create** button.

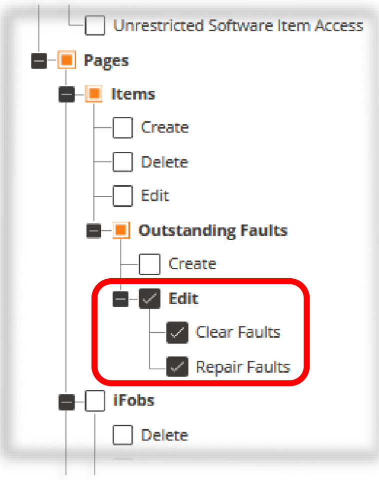


NOTE: An option for allocating Fault Logging software permissions might be to create 2 groups; one called 'Fault Admin' for users who can create/edit/delete Fault Definitions, and another called 'Fault Repairer' for users who can create/edit and repair/clear faults.

3. The permissions for the ability to create/edit/delete Fault Definitions can be found by expanding Web/Pages/Software Settings/Fault Definitions.

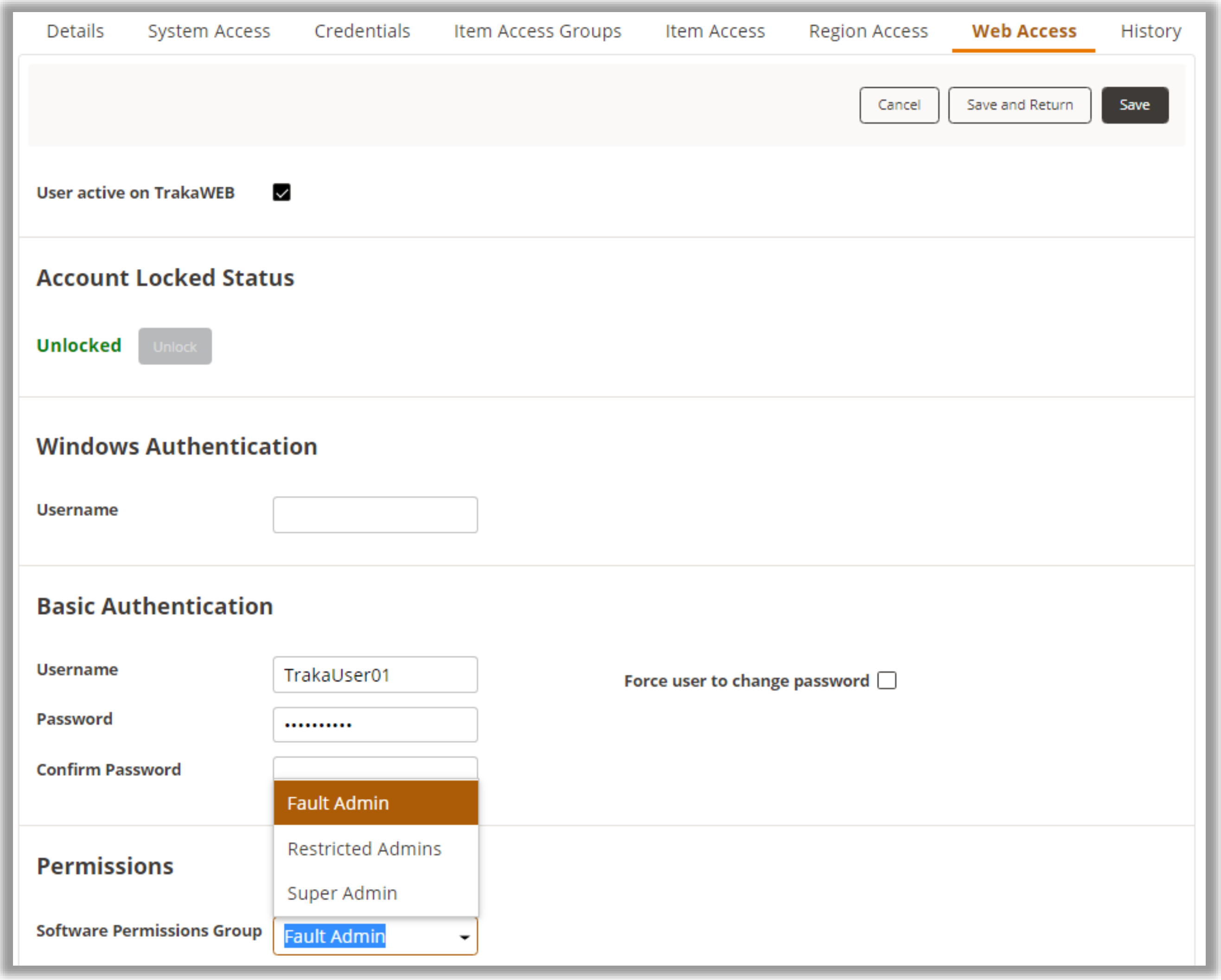


4. The permissions for the ability to create/edit, and repair/clear faults can be found by expanding Web/Pages/Items/Outstanding Faults.



5. To assign users to the Software Permissions Groups select **Users** from the Navigation Menu.

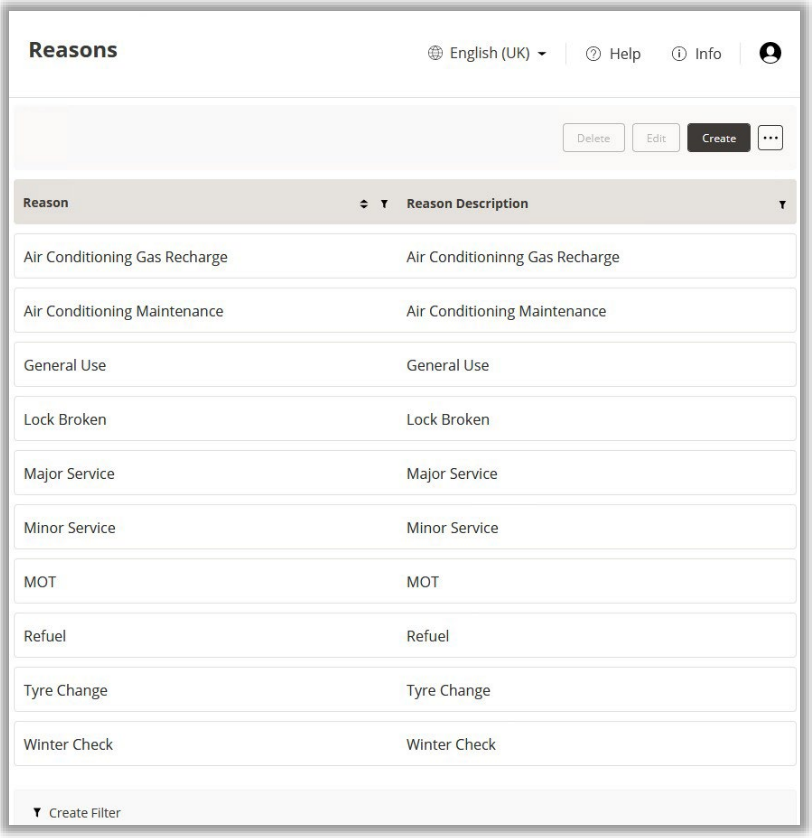
6. Select the desired user and click **Edit**. Select the **Web Access** tab and select the required group from the Software Permissions Group dropdown box. Click **Save** when you are finished editing.



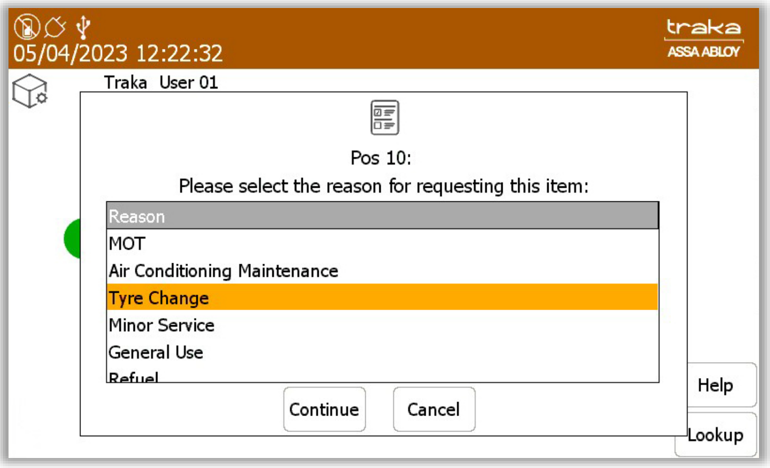
6.3 REASON LOGGING

Reason logging is a cost option that allows a user to log a 'reason' against the removal or return of an item. Reasons are created within TrakaWEB and are then selectable from a list at the Traka Touch system when either removing or returning an item.

The example below shows how a Reason List in TrakaWEB might look for a Traka System containing keys for a fleet of vehicles.



Once set up, the user will be prompted to select a Reason for removing and/or returning the item depending on how the Reason options have been configured.



The reason selected by the user is shown in the activity grid and can also be viewed in the Reason Reports.

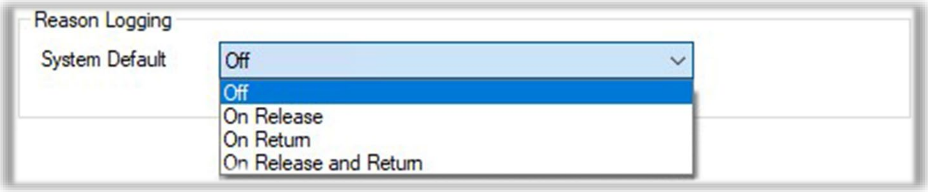
Please read the following section for more detailed information and the process for setting up and configuring the Reason Logging options to best suit your requirements.

6.3.1 ENABLING THE OPTION

Reason Logging will need to be enabled in the system configuration and the Admin Application before it is usable in TrakaWEB. To have it enabled within the configuration, you will need to contact Traka or your Distributor for further details.

1. Enabling the option at its base level within the Admin Application will apply to all positions within the system. An administrator who has the appropriate access to the Admin Application will need to select the desired system and navigate to the Feature Options tab.

2. The Reason Logging section has a drop-down box that consists of the following four options.



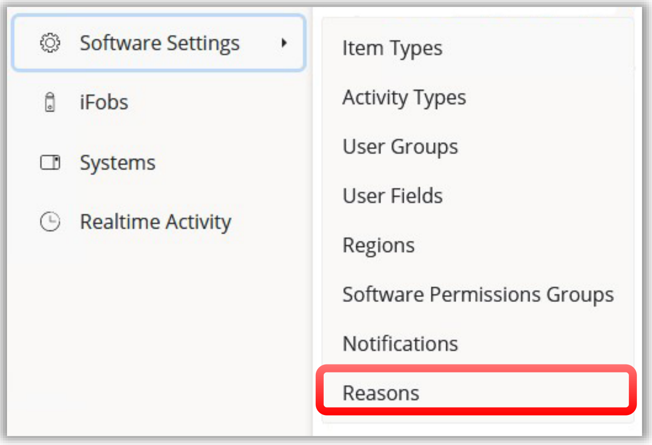
- **Off** - will deactivate the option completely
- **On Release** - will activate the option when removing an item
- **On Return** - will activate the option when returning an item
- **On Release and Return** - will activate the option when returning and removing an item

3. Select the desired option and click the Save button at the bottom of the application. This will update the Traka Touch system as well as TrakaWEB.

It is possible to change the effect of the option on a per iFob/item basis. Please see the appropriate section below for further instructions.

6.3.2 CREATING REASONS

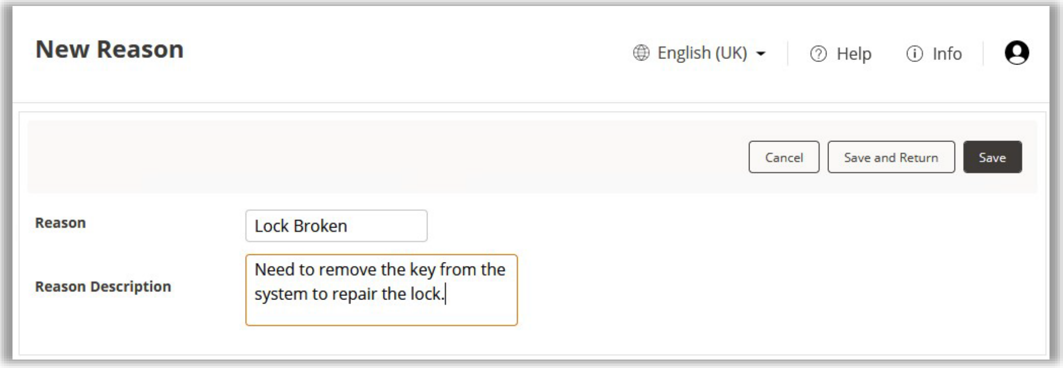
To create a Reason, select the Software Settings button from the Navigation Menu and click the **Reasons** button as shown below.



The current reasons list will then be displayed. If this is your first-time using reason logging, then the grid will be empty and have no information populating it.

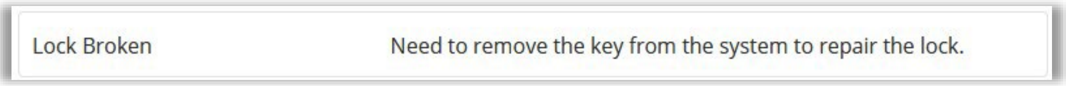
1. Click the **Create** button.

2. A new form will appear allowing you to enter both a **Reason** and **Reason Description**. The **Reason** has a maximum of 50 characters and acts as a summary on the Traka Touch screen when removing/returning the item and in TrakaWEB system viewer. The **Reason Description** has a maximum character length of 500 and allows for a more detailed description, which is used for reports.



3. Once you have finished, click the **Save and Return** button.

4. The list will now have the new Reason you just added.

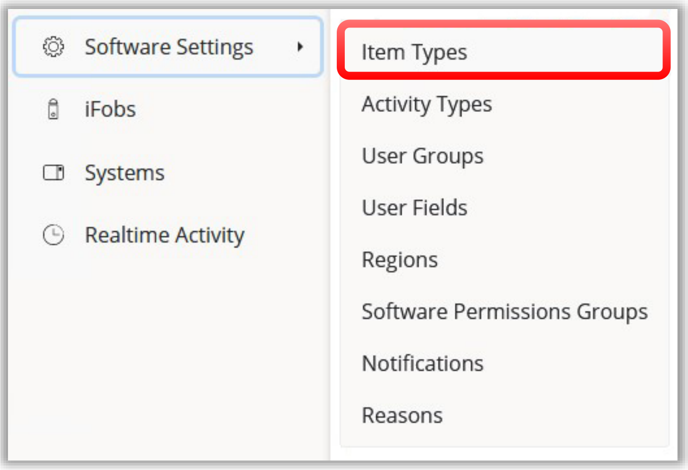


6.3.3 ADDING THE REASON TO YOUR ITEM TYPE

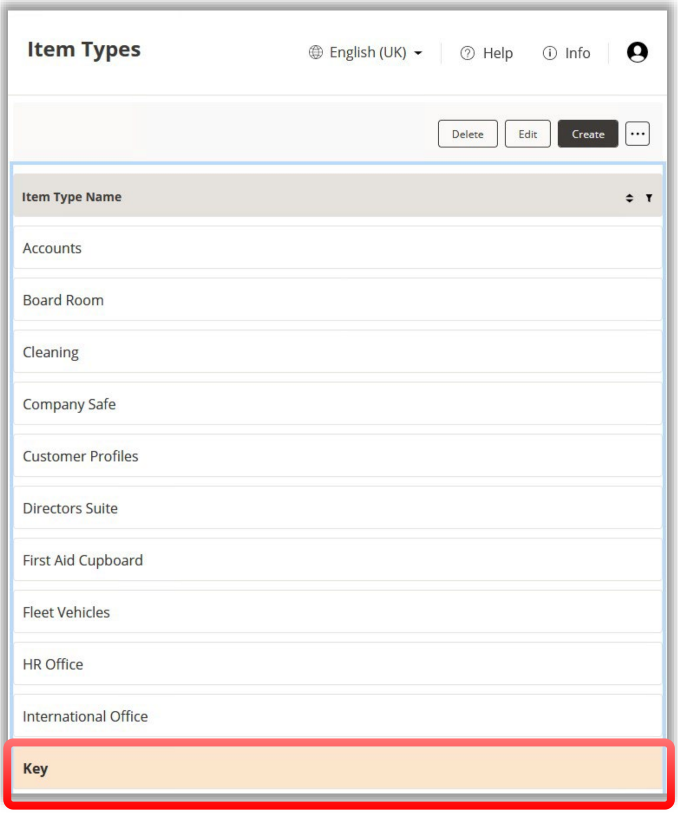
Before you can begin to use this option, you must ensure that each position you wish to use with Reason Logging has an item defined. To assign an item to a position, please refer to the Adding an Item to an iFob topic.

Once an item has been defined, you will need to assign a Reason to the Item Type.

1. From the Toolbar select software settings, then click Item Types.



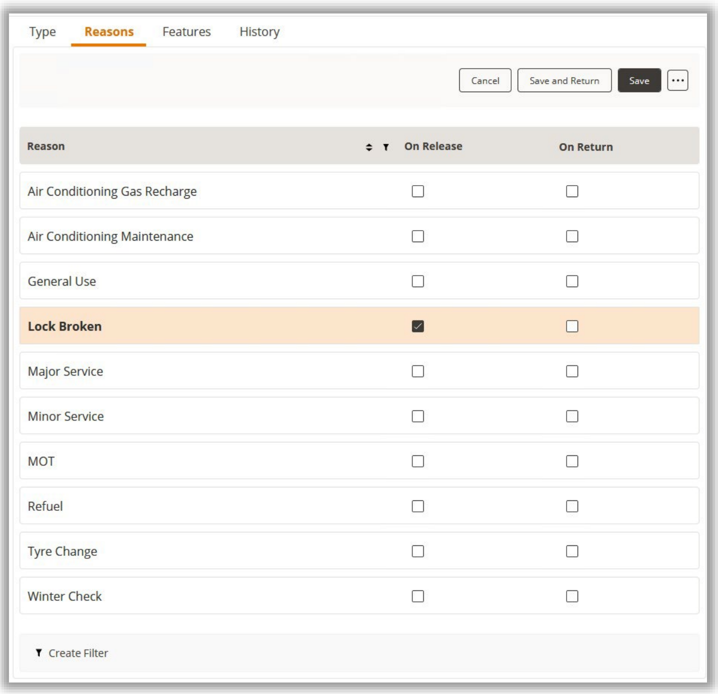
2. TrakaWEB will then display all the current item types that exist within the database. Highlight the desired item type.



3. Select the **Edit** button.

4. The item details form will open allowing you to change its information. Select the **Reasons** tab.

The reasons that you have created will be listed here. There are two columns - **On Release** and **On Return**. Ticking the appropriate boxes will determine which Reasons are available to be selected on either the removal or return of the selected item type. The reasons that you have created will be listed here.

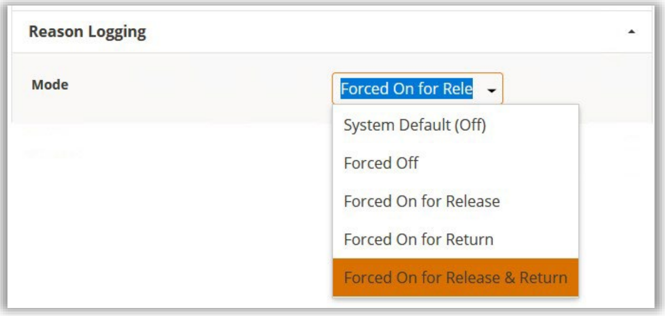


6.3.4 CHANGING THE OPTION ON A PER IFOB BASIS

NOTE: If your system is an RFID Locker System, it will not contain iFobs. However, this section will still be relevant and the term 'iFob' will be referring to the 'RFID Tag' in a Locker System.

To alter the option on a per iFob basis is simple and easy to do.

1. From the System Viewer, highlight the desired iFob and click the **Edit iFob** button from the Toolbar.
2. Select the **Features** tab, followed by **Reason Logging.**
3. From the Reason Logging drop-down, make the appropriate selection, e.g., Forced On for Release, Forced On for Return etc.



NOTE: This will override the settings that have been applied in the Admin Application and will only apply to this iFob.

NOTE: Selecting the system default will revert to the settings applied in the Admin Application. The settings are displayed in brackets.

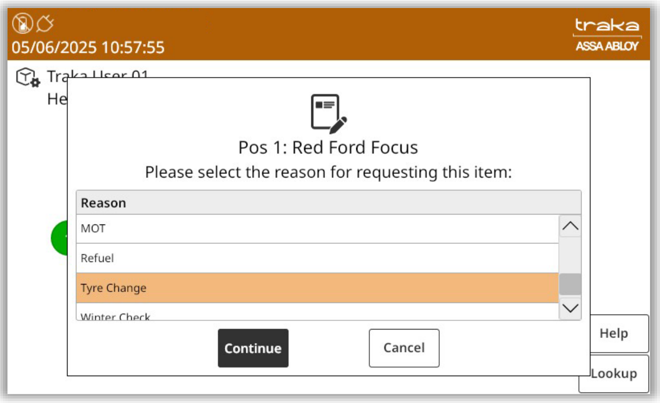
4. Once you have selected the desired option click the **Save and Return** button.

6.3.5 REASON LOGGING ON TRAKA TOUCH

Users with access to the required item will need to identify themselves to the system and navigate to the item selection screen.

1. Select the item you wish to remove.
2. A dialogue box will appear requesting that you select a reason for requesting the item. Select the reason and click **Continue.**

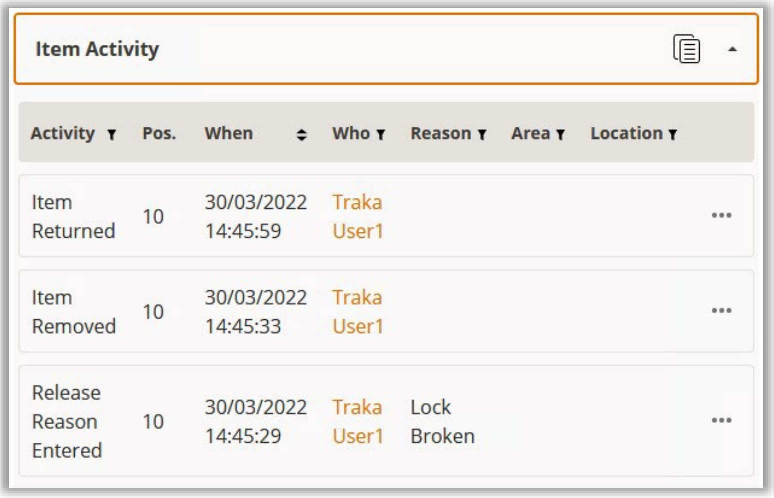
NOTE: Clicking cancel will take the user back to the item selection screen.



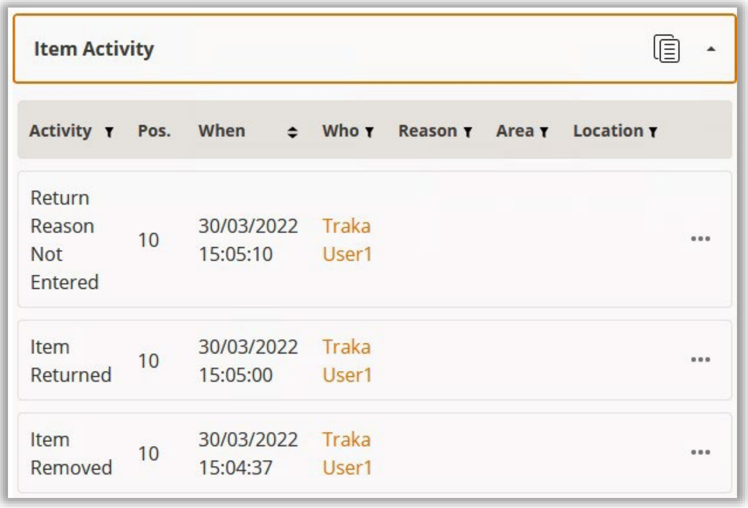
3. The item will now release from the system.

6.3.6 ACTIVITIES

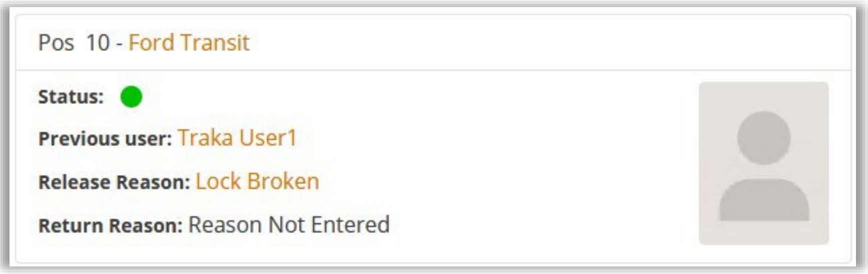
The System Viewer displays a grid that holds the last 30 days of activities for the selected iFob/item in the system. When a user selects a reason at the Traka Touch system when releasing/returning an item and clicks the Continue button, a 'Return Reason Entered' and/or 'Release Reason Entered' activity will be generated in the Item Activity tab.



If a user returns an item and they do not select a reason and close the door, a **Return Reason Not Entered** activity will be generated.



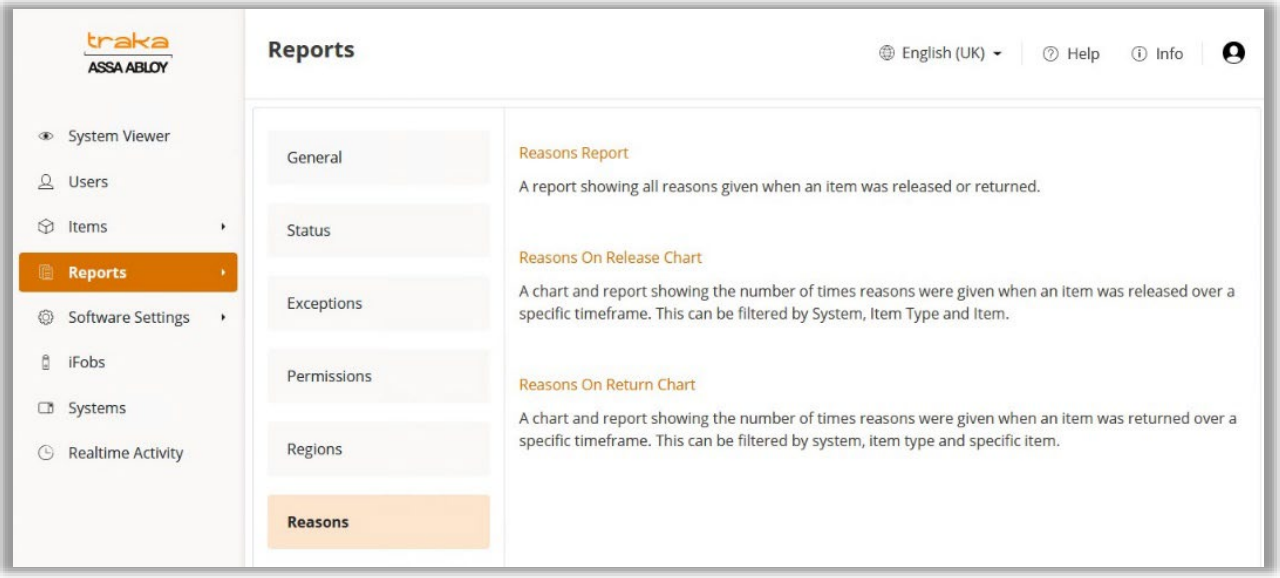
You can also see the Release/Return Reason in the detail panel on the system viewer. The reason is selectable and clicking it will take you to the Edit Reason page where you can edit the long and short description.



6.3.7 REASON LOGGING REPORTS

You can run various reports to see which items have been removed/returned with what 'reason' logged against them.

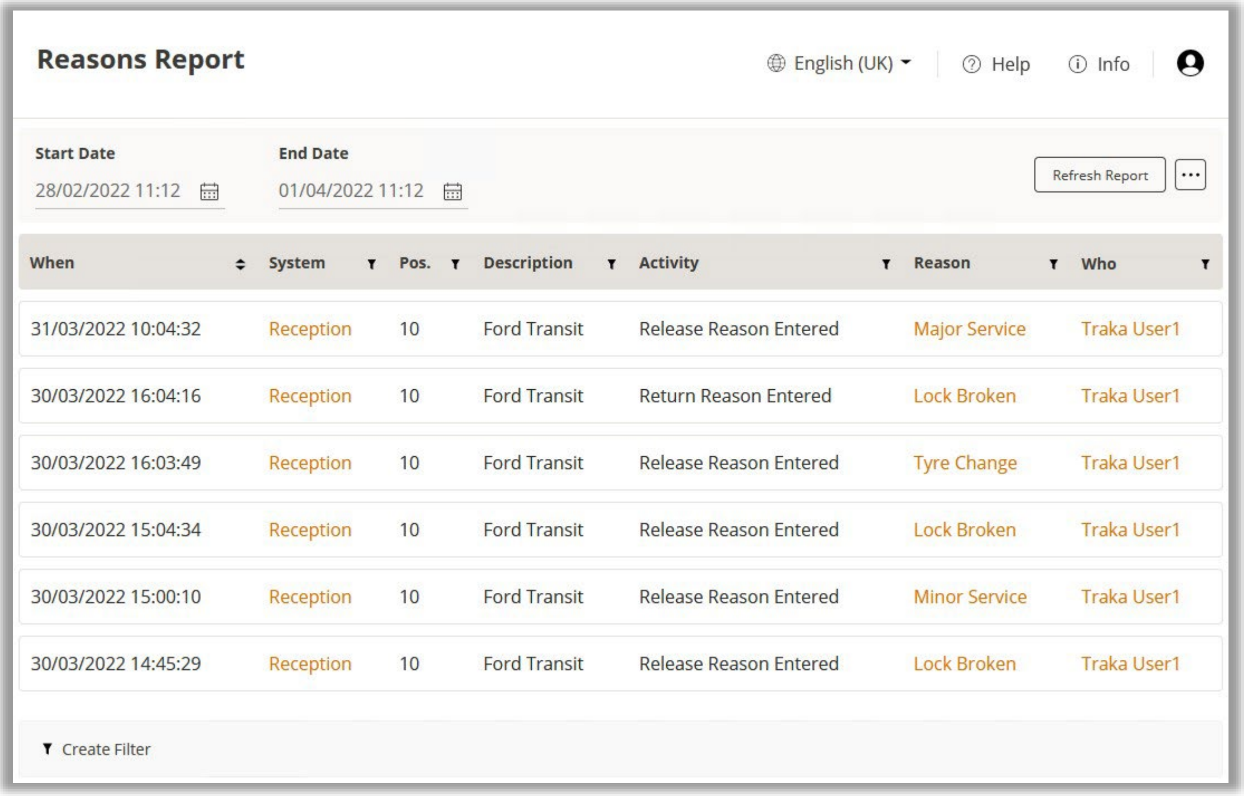
1. From the Navigation Menu, select the **Reasons** tab from the Reports menu.



The Reasons report list provides 3 report options.

<u>Reasons Report</u>

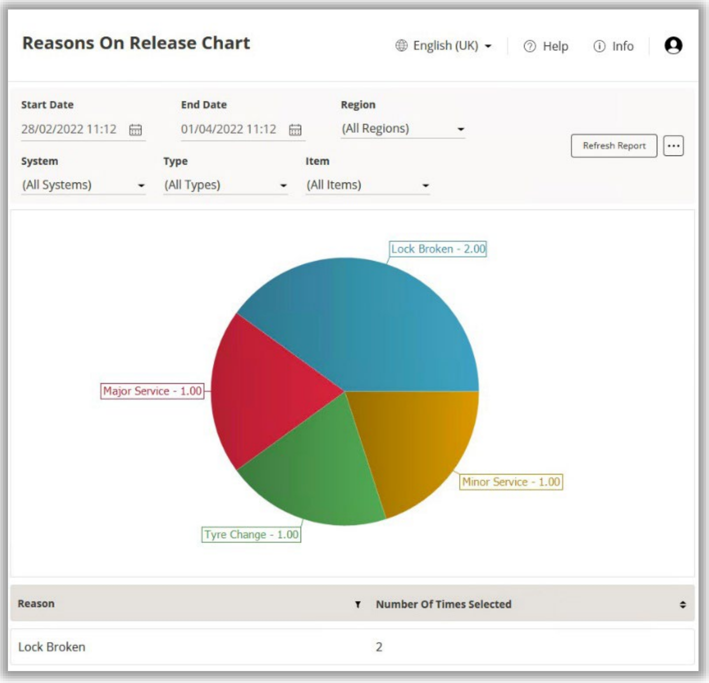
A report showing all reasons given when an item was released or returned.



You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the Toolbar.

Reasons On Release Chart

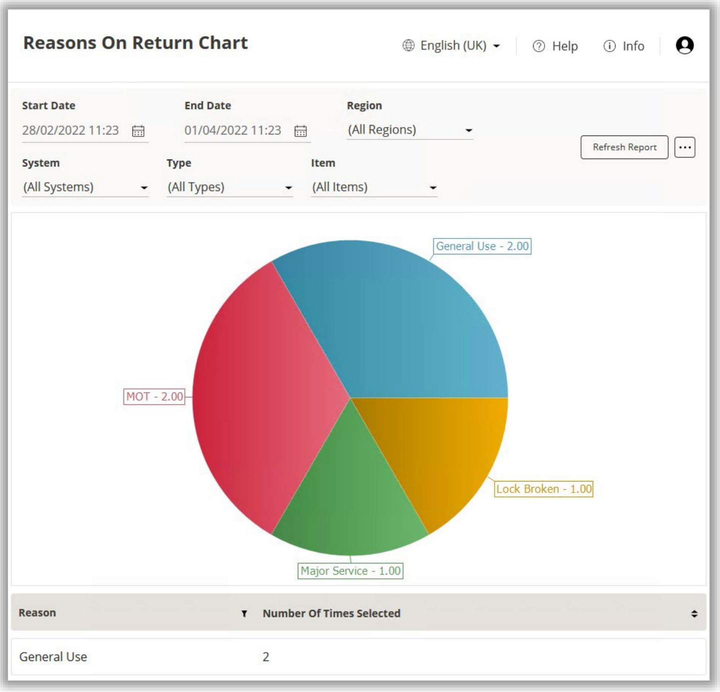
A chart showing the number of times reasons were given when an item was released over a specific timeframe. This can be filtered by System, Item Type and Item.



You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the toolbar.

Reasons On Return Chart

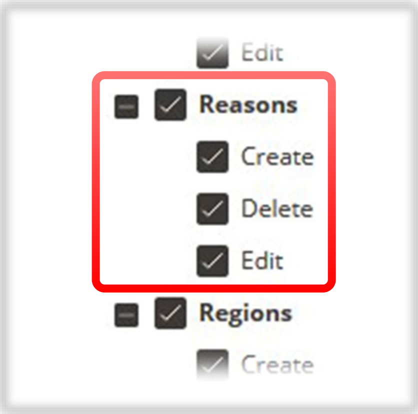
A chart and report showing the number of times reasons were given when an item was returned over a specific timeframe. This can be filtered by system, Item Type and Specific Item.



You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the Toolbar.

6.3.8 SOFTWARE PERMISSIONS

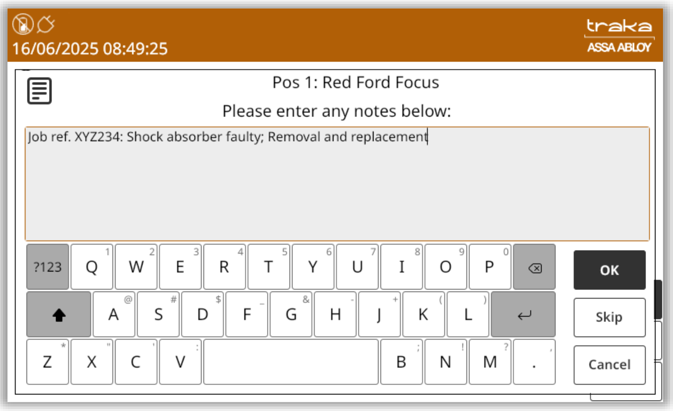
From the TrakaWEB Software Permissions Groups, permissions maybe granted to users to Create, Edit or Delete Reasons as required. The permissions can be located by expanding Web/Pages/Software Settings/Reasons.



6.4 NOTES LOGGING

Notes Logging is a cost option that allows a user to enter a note into an on-screen dialogue box at the Traka Touch system when removing or returning an item. A maximum of 255 characters can be entered at any one time.

With Notes Logging enabled, when a user removes and/or returns an item, a window with a keyboard will pop up allowing them to enter a note. An example is shown below.



The activity grid will display whether or not a note has been entered, and the entered note can be viewed from the [Notes Report](#) in TrakaWEB.

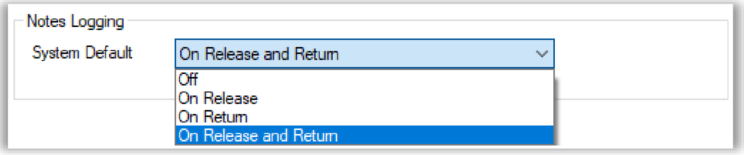
Please read the following section for more detailed information and the process for setting up and configuring Notes Logging.

6.4.1 ENABLING THE OPTION

Notes Logging will need to be enabled in the system configuration and the Admin Application before it is usable in TrakaWEB. To have it enabled within the configuration you will need to contact Traka or your Distributor for further details.

1. To enable the option at its base level within the Admin Application will apply to all positions within the system. An administrator who has the appropriate access to the Admin Application will need to select the desired system and navigate to the Feature Options tab.

2. The Notes Logging section has a drop-down box that consists of the following four options:



- **Off** - will deactivate the option completely.
- **On Release** - will activate the option when removing an item.
- **On Return** - will activate the option when returning an item.
- **On Return and Release** - will activate the option when returning and removing an item.

3. Select the desired option and click the **Save** button at the bottom of the application. This will update the Traka Touch system as well as TrakaWEB.

It is possible to change the effect of the option on a per iFob/item basis. Please see the appropriate section below for further instructions.

6.4.2 CHANGING THE OPTION ON A PER IFOB BASIS

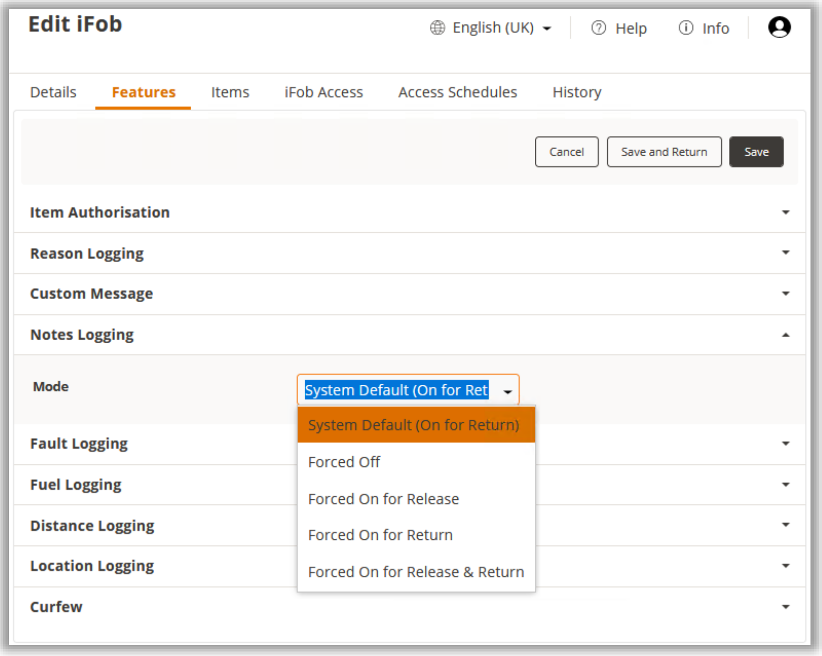
NOTE: If your system is an RFID Locker System, it will not contain iFobs. However, this section will still be relevant and the term 'iFob' will be referring to the 'RFID Tag' in a Locker System.

To alter the option on a per iFob basis is simple and easy to do.

1. From the system viewer, highlight the desired iFob and click the **Edit iFob** button from the Toolbar.
2. Select the **Features** tab.
3. From the Notes Logging drop-down box, make the appropriate selection, e.g. Forced On for Release, Forced On for Return etc.

NOTE: This will override the settings that have been applied in the Admin Application and will only apply to this iFob.

NOTE: Selecting the system default will revert back to the settings applied in the Admin Application. The settings are displayed in brackets.



4. Once you have selected the desired option, click the **Save and Return** button.

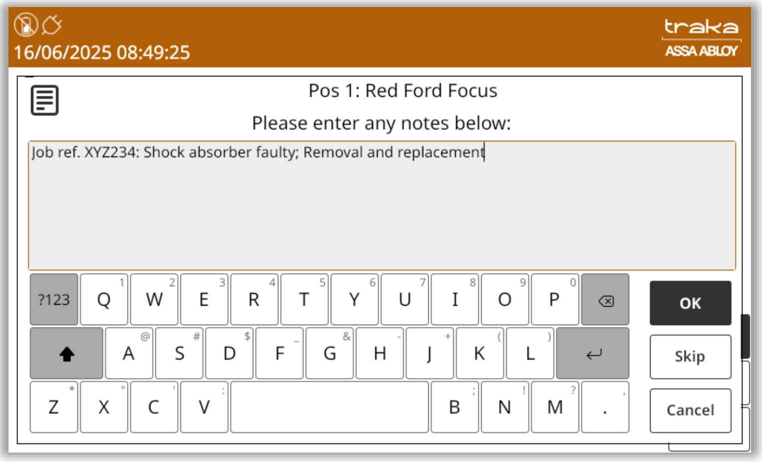
6.4.3 NOTES LOGGING ON TRAKA TOUCH

1. Users with access to the required item will need to identify themselves to the system and navigate to the item selection screen.

2. Select the item they wish to remove.

3. A dialogue box will appear allowing the user to enter a note relating to the item.

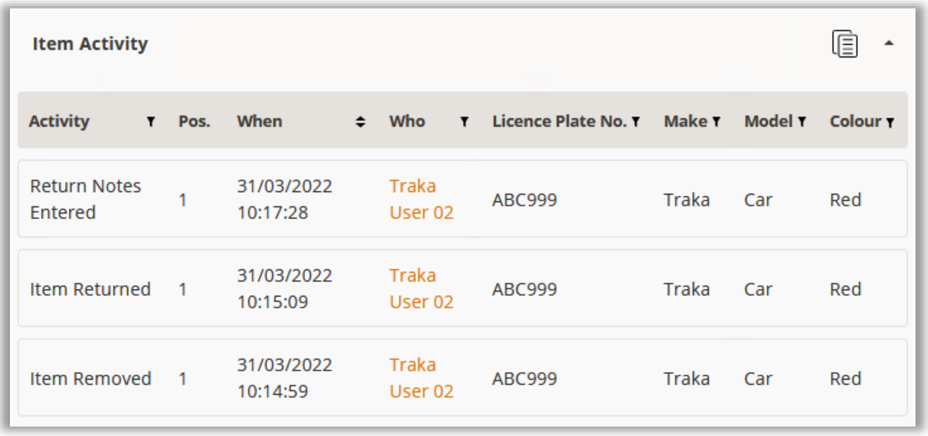
NOTE: If the user selects Skip button, the item will be released but no notes will be entered against the item.



4. Click **OK**. The item will now be released from the system.

6.4.4 NOTES LOGGING ACTIVITIES

The System Viewer displays a grid that holds the last 30 days of activities for the selected iFob/item in the system. When a user enters a note at the Traka Touch system when releasing/returning an item, and clicks the OK button, a 'Return Notes Entered' and/or 'Release Notes Entered' activity will be generated in the Item Activity tab.

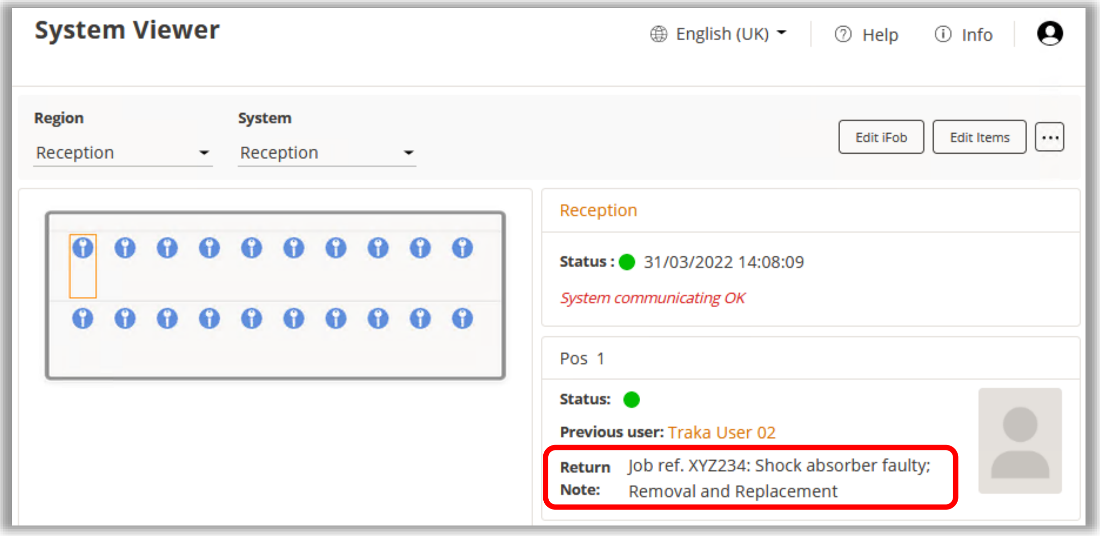

Item Activity

Activity	Pos.	When	Who	Licence Plate No.	Make	Model	Colour
Return Notes Entered	1	31/03/2022 10:17:28	Traka User 02	ABC999	Traka	Car	Red
Item Returned	1	31/03/2022 10:15:09	Traka User 02	ABC999	Traka	Car	Red
Item Removed	1	31/03/2022 10:14:59	Traka User 02	ABC999	Traka	Car	Red

If a user returns an item, they do not enter a note, and they select OK/Skip or close the door, a 'Return Notes Not Entered' activity will be generated.

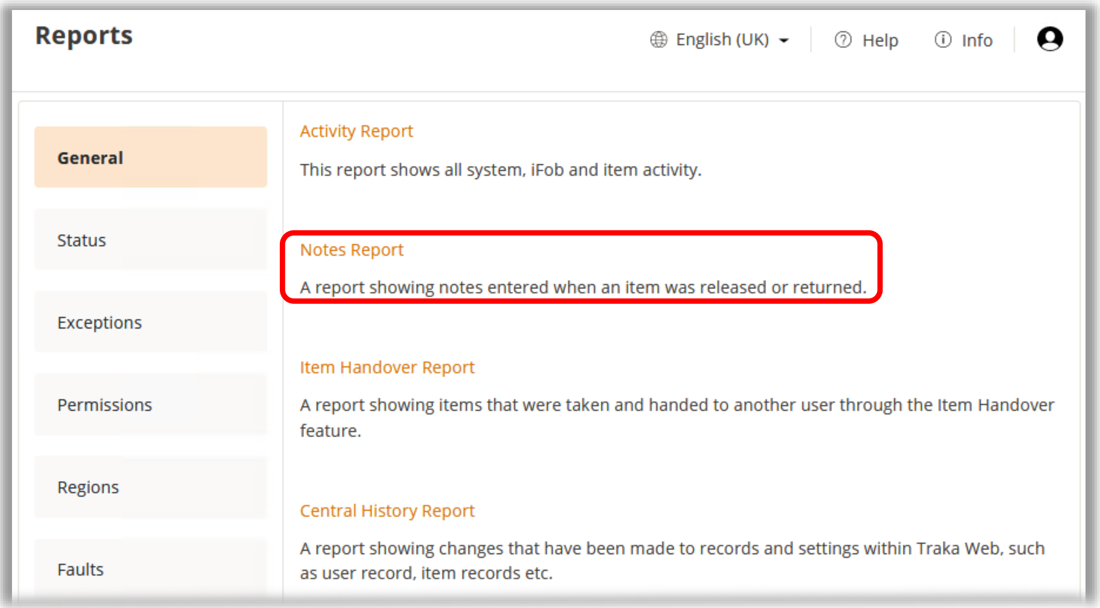
NOTE: No activity will be generated when a user removes and item and does not enter a note.

You can also see the Release/Return Note in the detail panel on the System Viewer.



6.4.5 NOTES REPORT

You can run various reports to see which notes were entered against an item and when it was released or returned. The Notes Report is accessible by selecting **Reports** in the Navigation Menu, then clicking on **General** and **Notes Report**.

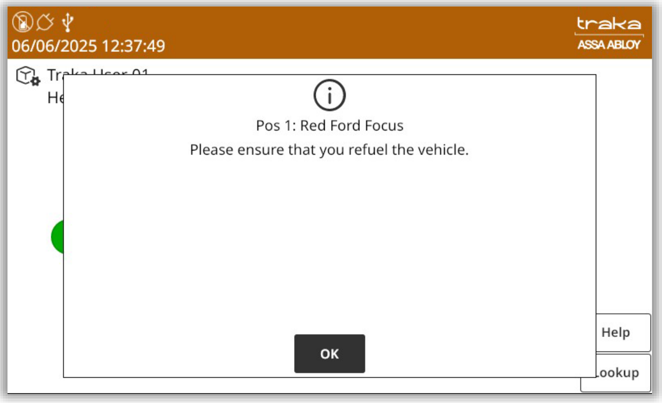


6.5 CUSTOM MESSAGES

6.5.1 CUSTOM MESSAGES

Custom Messages is a cost option that allows the Traka Touch to display a definable message to the user when they remove or return an item. This message can be defined for each individual position in the system. This ensures that the user is aware of any special condition that must be met in relation to the item.

Once setup, the message will be displayed when a user removes and/or returns an item depending on how the Custom Messages have been configured. An example is shown below.



The user can acknowledge the message by clicking **OK**. The activity grid will display whether or not this message has been acknowledged.

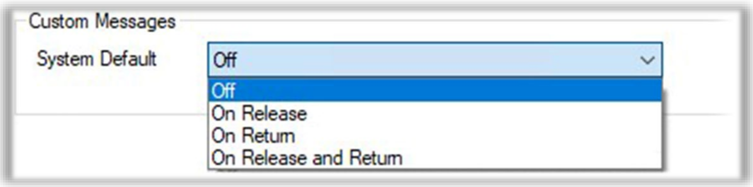
Please read the following section for more detailed information and the process for setting up and configuring Custom Messages.

6.5.2 ENABLING THE OPTION

Custom Messaging will need to be enabled in the system configuration and the Admin Application before it is usable in TrakaWEB. To have it enabled within the configuration you will need to contact Traka or your Distributor for further details.

1. To enable the option at its base level within the Admin Application will apply to all positions within the system. An administrator who has the appropriate access to the Admin Application will need to select the desired system and navigate to the Feature Options tab.

2. The Notes Logging section has a drop-down box that consists of the following four options:



- **Off** - will deactivate the option completely
- **On Release** - will activate the option when removing an item
- **On Return** - will activate the option when returning an item
- **On Return and Release** - will activate the option when returning and removing an item

3. Select the desired option and click the Save button at the bottom of the application. This will update the Traka Touch system as well as TrakaWEB.

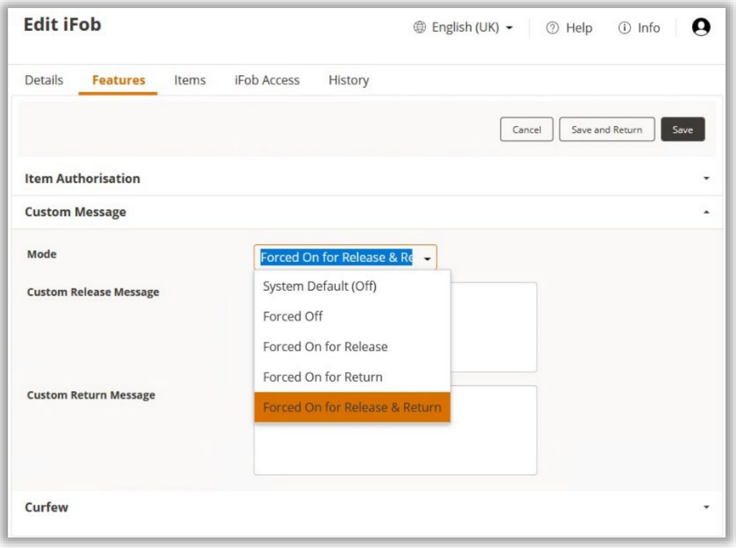
6.5.3 CHANGING THE OPTION ON A PER IFOB BASIS & CREATING A CUSTOM MESSAGE

NOTE: If your system is an RFID Locker System, it will not contain iFobs. However, this section will still be relevant and the term 'iFob' will be referring to the 'RFID Tag' in a Locker System.

1. From the System Viewer highlight the desired iFob.
2. Click the **Edit iFob** button.
3. Navigate to the **Features** tab on the Toolbar.
4. From the Custom Messages drop down box make the appropriate selection, e.g., Forced On for Release, Forced On for Return etc.

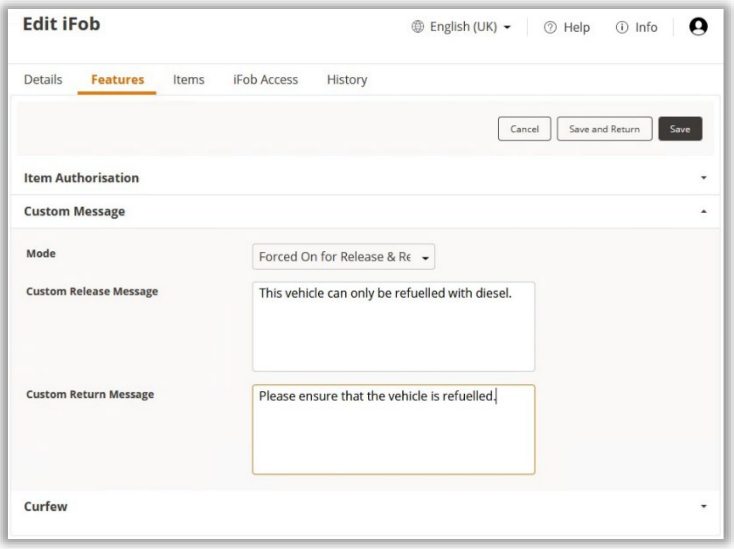
NOTE: This will override the settings that have been applied in the Admin Application and will only apply to this iFob.

NOTE: Selecting the system default will revert back to the settings applied in the Admin Application. The settings are displayed in brackets.



5. In the example below, 'Forced On for Release & Return' has been selected. This will display a message to the user when they remove and return the item. You will now be able to enter the desired message into both fields.

NOTE: The message fields have a maximum character length of 200.



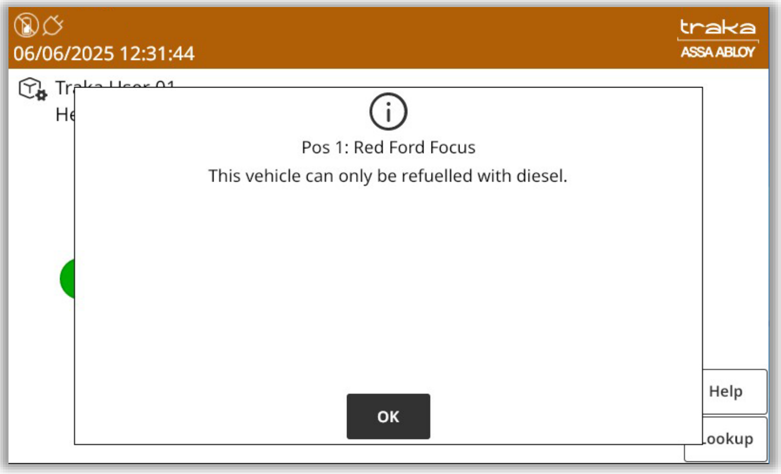
6. Once you have finished, click the **Save** or **Save and Return** button.

6.5.4 CUSTOM MESSAGES ON TRAKA TOUCH

1. Users with access to the required item will need to identify themselves to the system and navigate to the item selection screen.

2. Select the item they wish to remove.

3. A dialogue box will appear displaying the message that was previously entered in TrakaWEB.

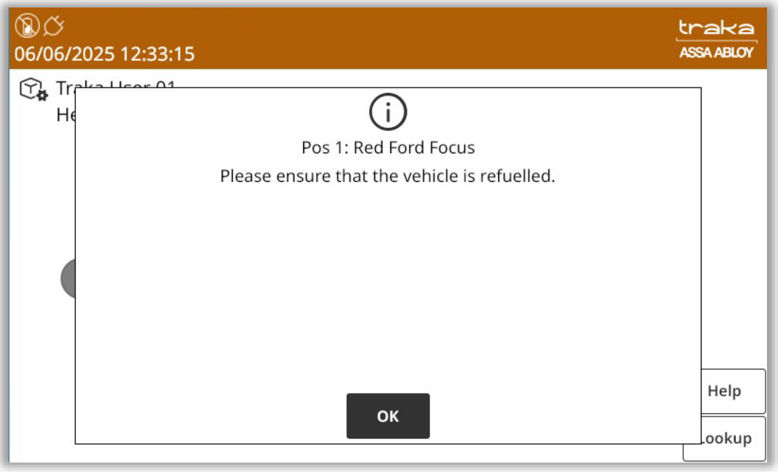


4. Click OK to continue.

NOTE: The item will not be released unless the user selects the OK Button. If the user does nothing, the message will disappear, allowing the user to make another item selection.

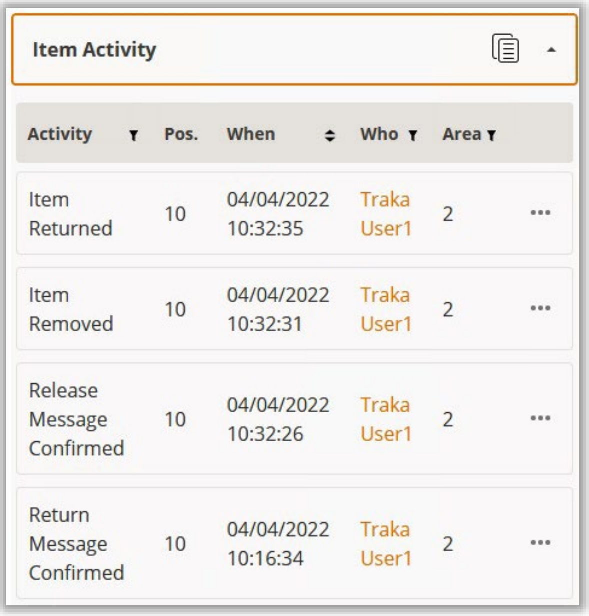
The item will now release from the system.

5. If you have the system setup to show a custom message when the item is returned, the user will access the system in the usual way, return the item to the correct position and receive the message on screen.

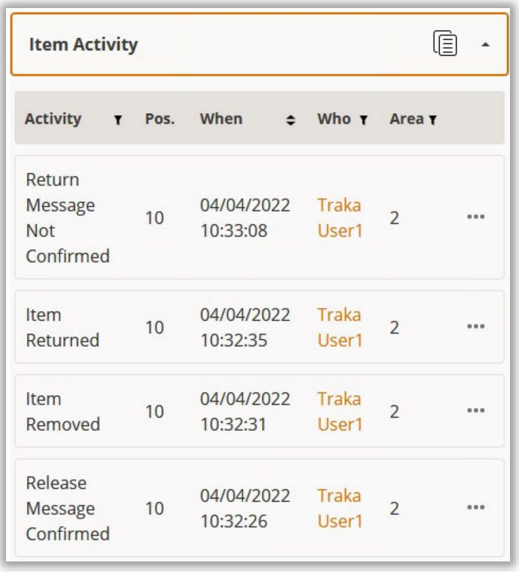


6.5.5 ACTIVITIES

The System Viewer displays a grid that holds a list of activities for the selected iFob/item in the system. When a user selects the OK button after removing/returning an item with a custom message, a 'Return Message Confirmed' and/or 'Release Message Confirmed' activity will be generated in the iFob Activity tab.

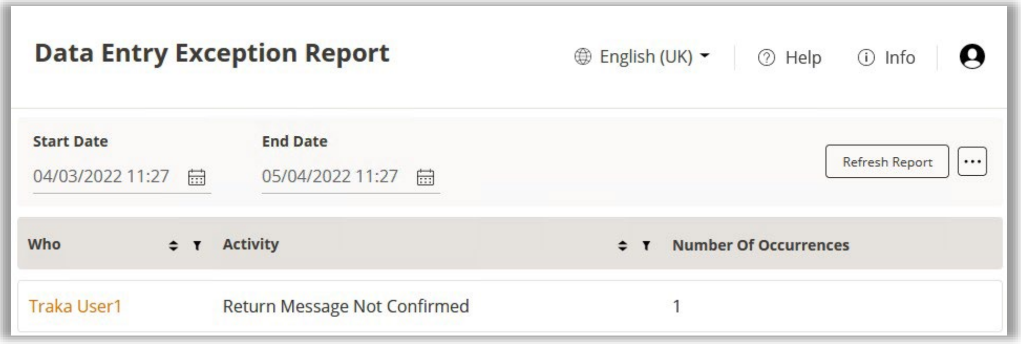


If a user returns an item that has a custom message and they do not select the OK button when the message appears, a 'Return Message Not Confirmed' activity will be generated.



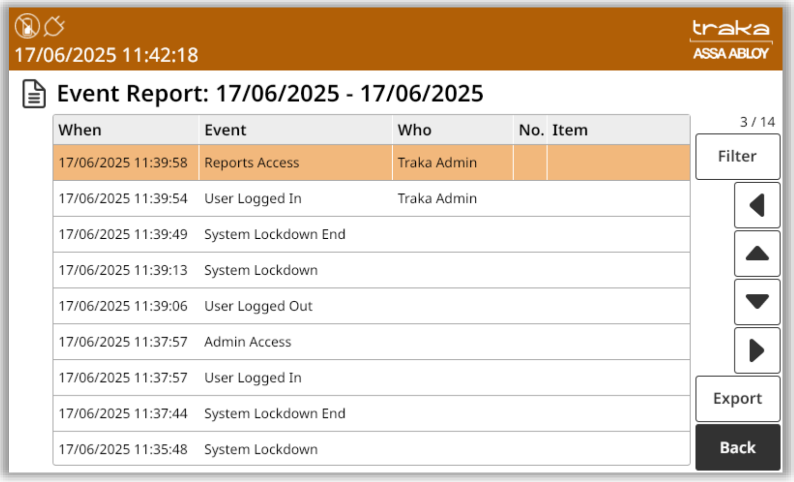
6.5.6 REPORTS

An exception report will be generated for any messages that have not been confirmed. This can be viewed by accessing the Data Entry Exception Reports from the Reports tab on the Navigation Menu.



You can export the report as a PDF or into an Excel Spreadsheet by selecting the Ellipsis button from the Toolbar.

An Event Report can also be viewed at the Traka Touch system for activities relating to Custom Messages.



6.6 EMAIL NOTIFICATIONS

6.6.1 EMAIL NOTIFICATION OVERVIEW

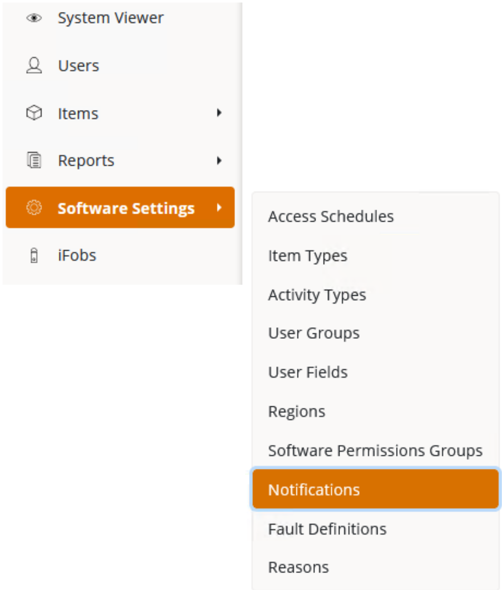
The Email Notification System allows an email to be sent to one or more users when certain system conditions are met. For example, this feature is useful to notify administrators if items are not returned on time, or to send a receipt to a user who has taken an item.

The Email notification will need to be configured in the Business Engine before it is usable in TrakaWEB. For detailed information on how to configure this, please review the ‘Email Configuration’ section in the latest version of **TD0013 - TrakaWEB Installation & Configuration Guide** & **TD0216 TrakaWEB Version 4 Installation & Configuration Guide.**

6.6.2 NOTIFICATION DETAILS

This section explains how to configure the email that will be sent upon a notification being triggered. This includes a range of details such as types of triggers, recipient(s), subject, and the content of the email.

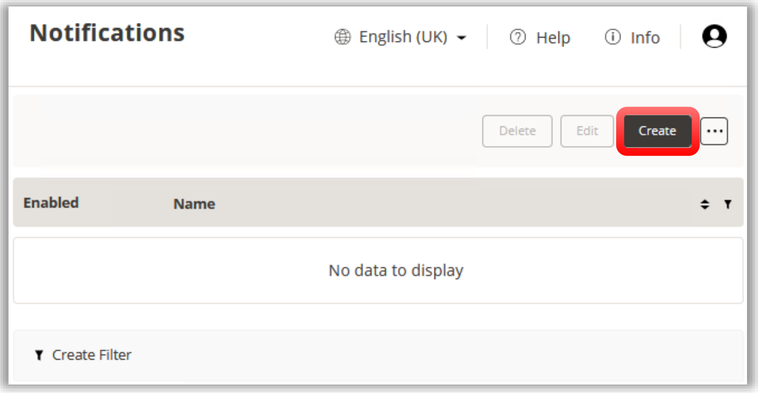
1. From the Navigation Menu, select the **Software Settings** and then **Notifications**.



2. You will then be taken to the Notifications page. Here is where all the notifications that you create will be listed.

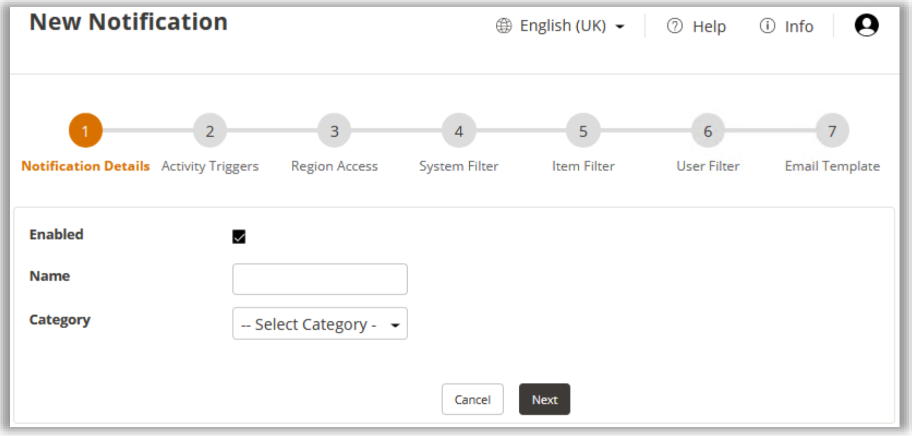
6.6.3 CREATING A NEW EMAIL NOTIFICATION

1. To create a new notification, click on the **Create** button.



6.6.3.1 NEW NOTIFICATION DETAILS

1. The process of creating a New Notification comprises 7 steps. In Step 1: Notification Details, you will be allowed to enter specific details.



Enabled: Tick this box to enable the notification.

Name: Enter the name you wish to give the notification.

Category: The drop-down box will present you with 6 options.

Each option within the 'Notification Category' contains different notification 'sets'. The Category allows you to customise the different triggers and filters depending on what type of notification you wish to receive. These are as follows:

Item: Creates notifications triggered by Item activity.

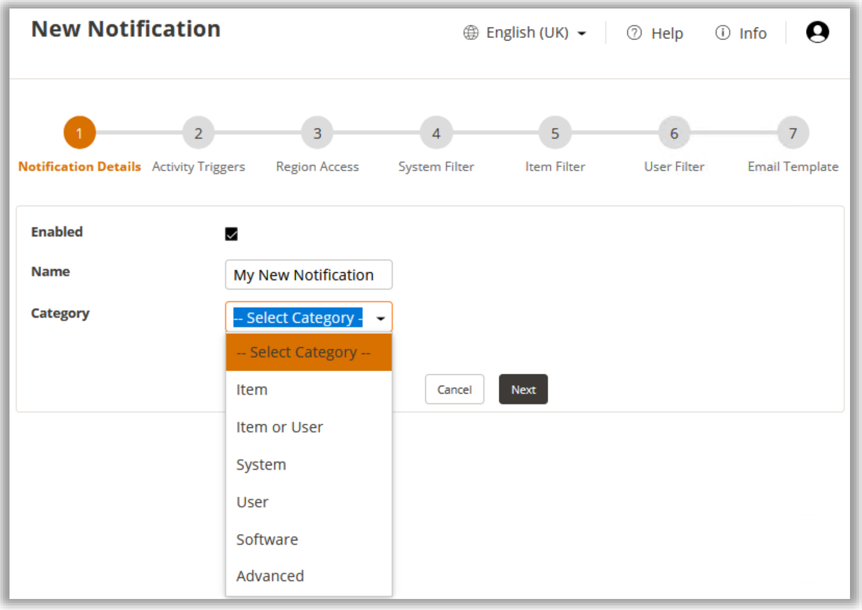
Item or User: Creates notifications triggered by Item or User activity.

System: Creates notifications triggered by System activity.

User: Creates notifications triggered by User activity.

Software: This option will allow notifications to be created by any Software activity.

Advanced: This option is used to create notifications for every type of trigger available.



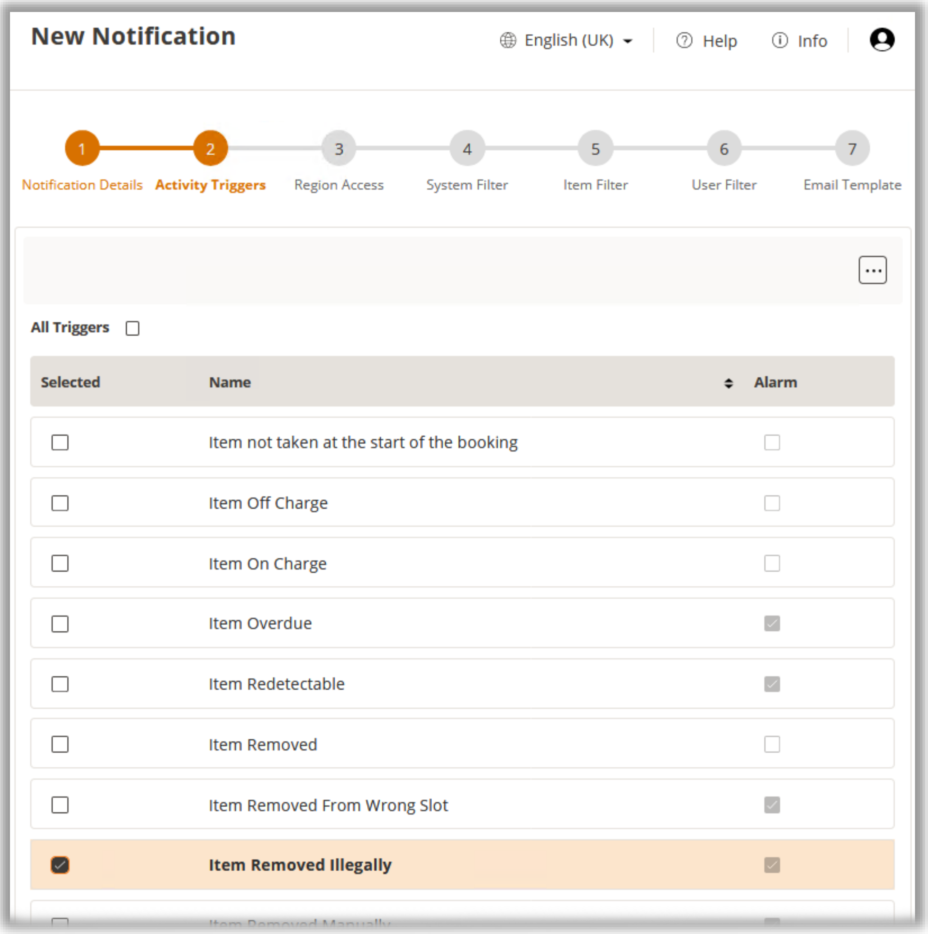
2. Once you have selected an option from the 'Notification Category', click **Next** to continue.

6.6.3.2 ACTIVITY TRIGGERS

This section explains how to define which activity types can trigger a notification.

Activity Triggers allow the selection of one or more activity types that may trigger a notification. The activity trigger is used in conjunction with filters to allow selection of activity and target object(s) where the target object is a system **OR** item **OR** a user.

From the 'Notification Details' page, you will be directed to the 'Activity Triggers' page. Here you can select one or more activities that will trigger the email notification. Clicking on the Check Box next to 'All Triggers' will automatically select all the Activity Triggers.



In the example above, 'Item Removed Illegally' has been selected. This means that when any item is removed illegally from any system by any user, the email notification will be triggered.

If you wish to limit this notification to activities on a particular system, item, or user, you can use the respective filters.

Clicking on the Check Box next to 'All Triggers' will automatically select all the Triggers listed.

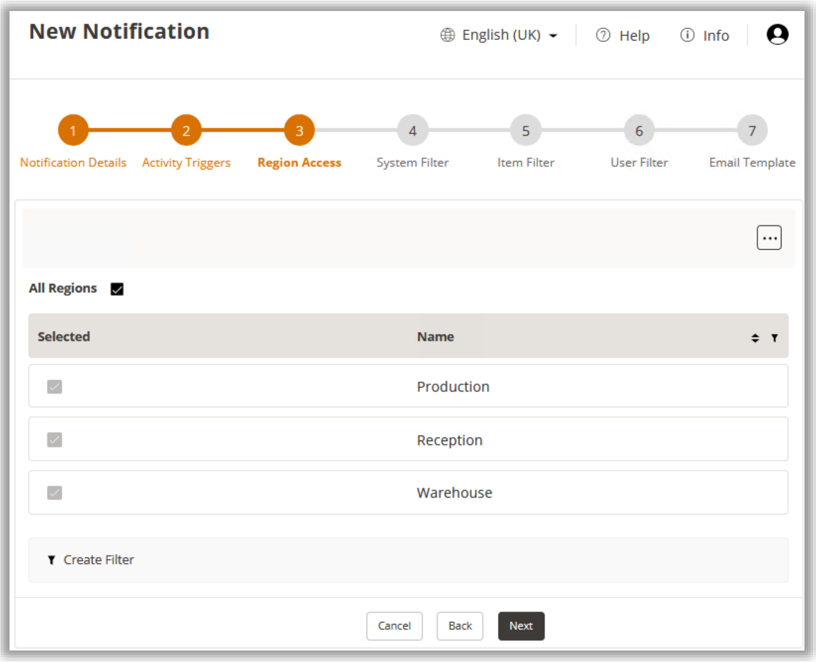
1. When you have completed selecting 'Activity Triggers', click **Next** to continue.

NOTE: If no activity type is selected, then no notification will be triggered for any activity.

6.6.3.3 REGION ACCESS

'Region Access' controls the visibility of the notification role allowing separate roles to be defined per region if required. Region access also adjusts the filters in the filtering section to only show filters relevant to the selected region.

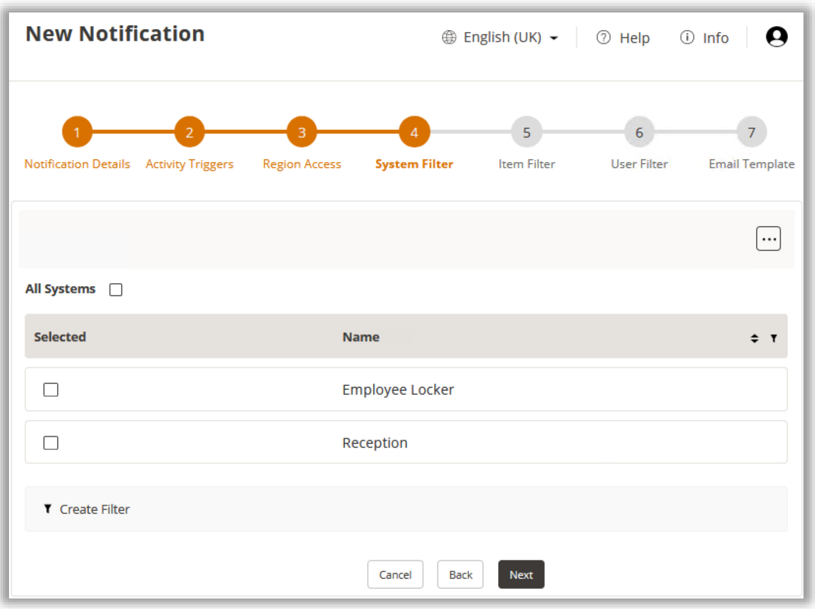
If the logged in user is an 'All Regions' user, the 'All Regions' checkbox will be ticked by default. If the user is not an 'All Regions' user, the checkbox will be unchecked and greyed out. The user will then have to select the individual regions they are interested in. Clicking on the check box next to 'All Regions' will automatically select all the Regions listed.



6.6.3.4 SYSTEM FILTER

The 'System Filter' allows for the selection of specific cabinet or locker systems. The window will only display systems which belong to the Regions which you have selected in the previous step.

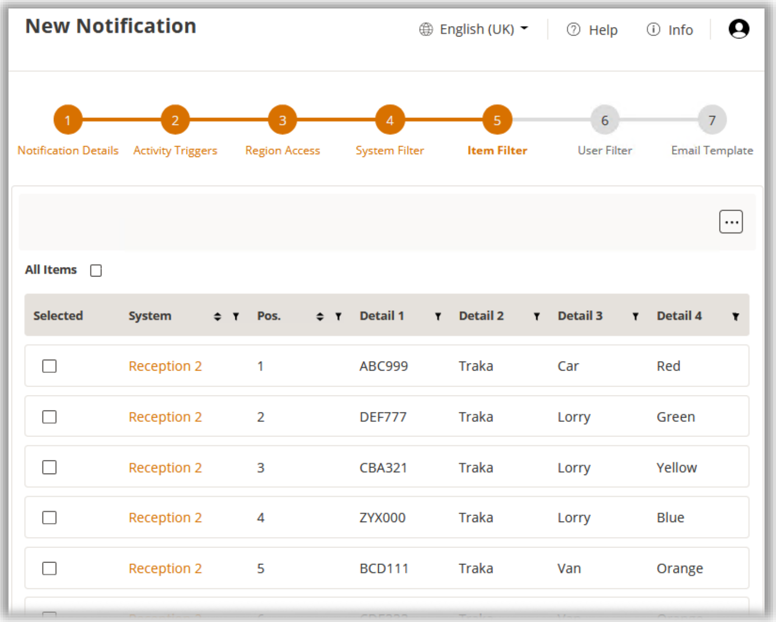
You can specify that only activities generated on a particular system will trigger a notification. Simply tick the box of the system(s) you wish to include. Notifications will only be triggered on the selected systems. Clicking on the Check Box next to 'All Systems' will automatically select all the Systems listed. Once you have finished your selection, click **Next** to continue.



6.6.3.5 ITEM FILTER

The 'Item Filter' allows for selection of specific items. Selecting no item will cause a notification to be triggered when an activity event occurs that references any item, otherwise only the selected item(s). Items will show in this tab depending on what systems have been checked in the previous tab.

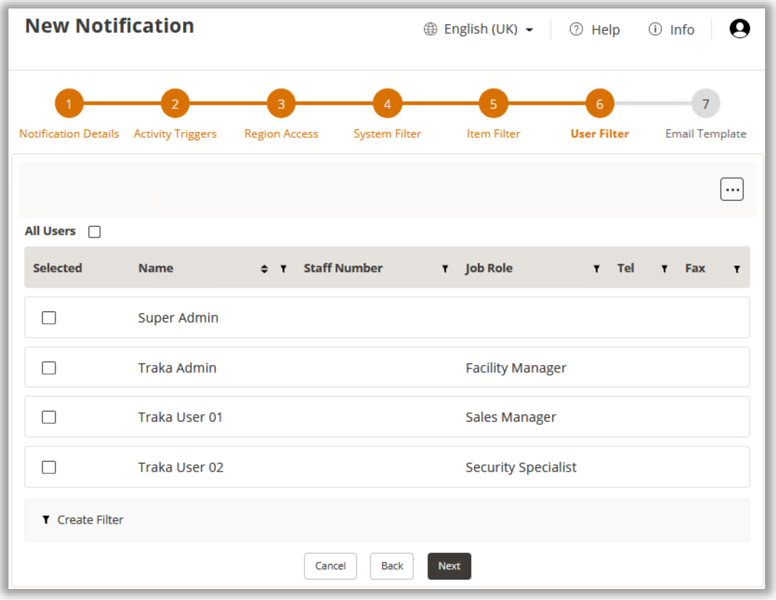
You can specify that only activities generated by a particular item will trigger a notification. Tick the box of the item(s) you wish to include. Clicking on the Check Box next to 'All Items' will automatically select all the Items listed. Click 'Next' to continue.



6.6.3.6 USER FILTER

The User Filter allows for selection of specific users. Selecting no user will cause a notification to be triggered when an activity event occurs that references any user otherwise only the selected user(s).

You can specify that only activities generated by a particular user will trigger a notification. Tick the box of the user(s) you wish to include. If no users are selected, then a notification will be triggered for an activity that occurs which references any user. Clicking on the check box next to 'All Users' will automatically select all the Users listed.



Once you have finished selecting Users, click **Next** to continue.

6.6.3.7 EMAIL TEMPLATE

You will now be taken to the 'Email Template' page where you will be required to enter specific details.

To: Enter the email address of the person(s) who will receive this email. When sending to multiple users, separate each address with either a comma or a semi-colon followed by a space. A 'Token' for the users email address may also be used here. By default, the email address is {User.Detail06} but can be customised if required. This is done within 'User Fields' under 'Settings'.

CC: Enter the email address of the person(s) who will be carbon copied with this email.

BCC: Enter the email address of the person(s) who will be blind carbon copied with this email.

Subject: Enter the subject of the notification.

Body: Here you can enter the body of the Email Template. You can also select 'tokens' from the drop-down boxes that define certain content of the notification i.e. forename, event, description, timestamp etc. Once selected, they will then populate the body of the email. This indicates what you will see in the email once the notification is sent.

NOTE: The CC and BCC fields are optional.

Below is a list of tokens that are selectable from the drop-down boxes on the Email Template page.

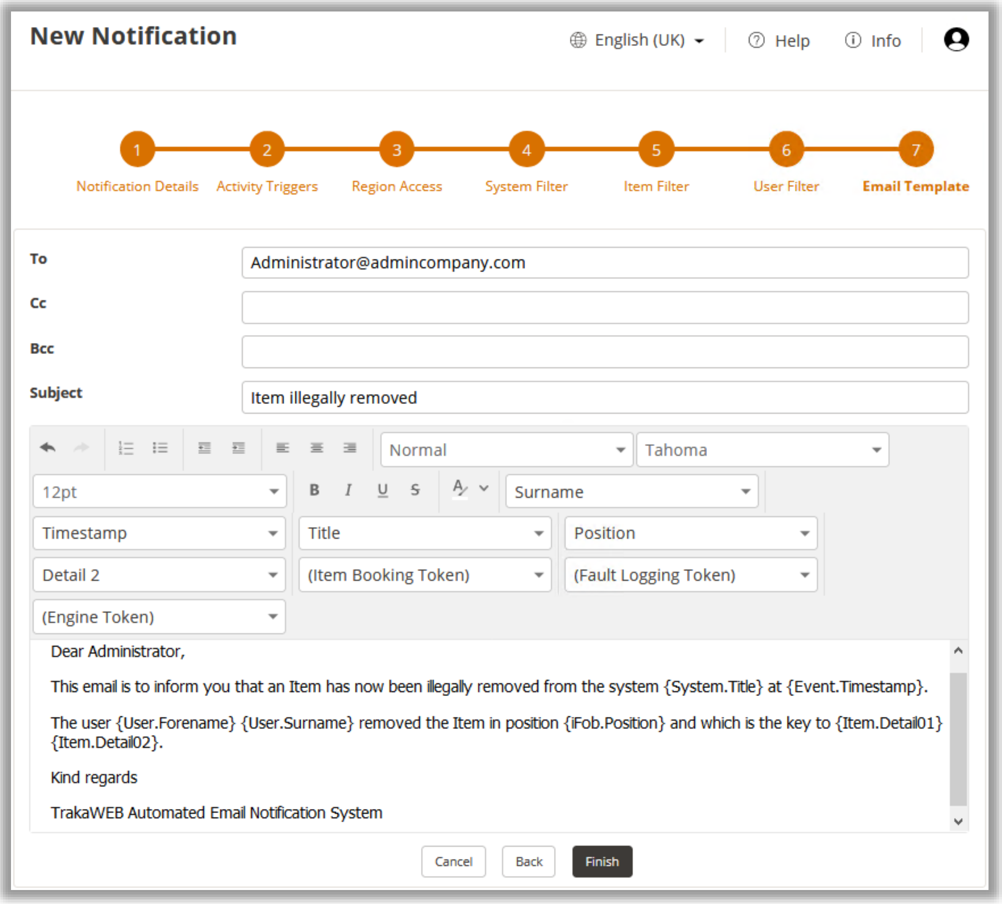
- {User.Forename}
- {User.Surname}
- {User.CardNumber}
- {User.DisplayName}
- {User.CardNumber}
- {User.Detail01}
- {User.Detail02}
- {User.Detail03}
- {User.Detail04}
- {User.Detail05}
- {User.Detail06}
- {User.Detail07}
- {User.Detail08}
- {User.Detail09}
- {User.Detail10}
- {User.Detail11}
- {Event.Timestamp}
- {Event.EventCode}
- {Event.Description}
- {System.Title}
- {iFob.Serial}
- {iFob.Position}
- {iFob.Description}
- {iFob.LastTimeTaken}
- {iFob.LastTimeReturned}
- {Item.Detail01}
- {Item.Detail02}
- {Item.Detail03}
- {Item.Detail04}
- {Item.Detail05}
- {Item.Detail06}
- {Item.Detail07}
- {Item.Detail08}
- {Item.Detail09}
- {Item.Detail10}
- {Item.Detail11}
- {Engine.Name}
- {Engine.Hostname}
- {Engine.IPAddress}
- {Engine.Port}

NOTE: The User Detail tokens refer to the eleven definable fields that you edit in the User Fields.

NOTE: The Item Detail tokens refer to the eleven definable information fields that are saved against a particular Item Type.

NOTE: Item tokens only relate to the first item defined for a position.

NOTE: If you wish to manually place these tokens in the body of the email, please ensure that you start and end each token with the following brackets {}. For example, {User.Forename}.

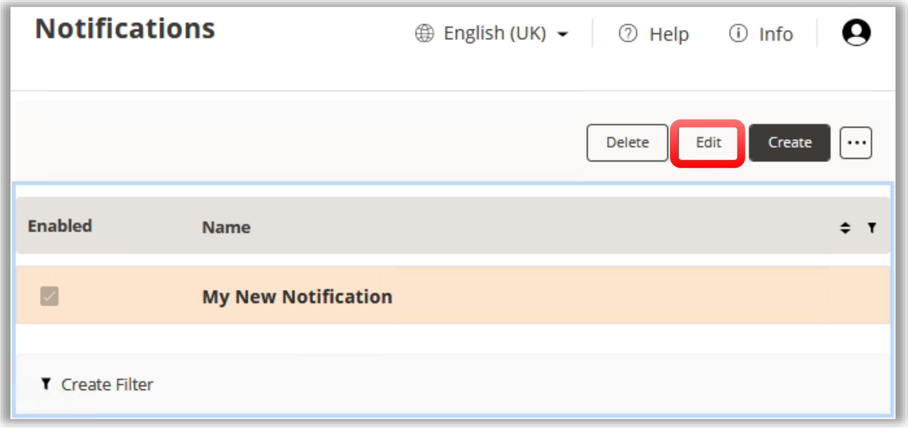


NOTE: It is important to enter information into the Subject field, otherwise the email will not be sent.

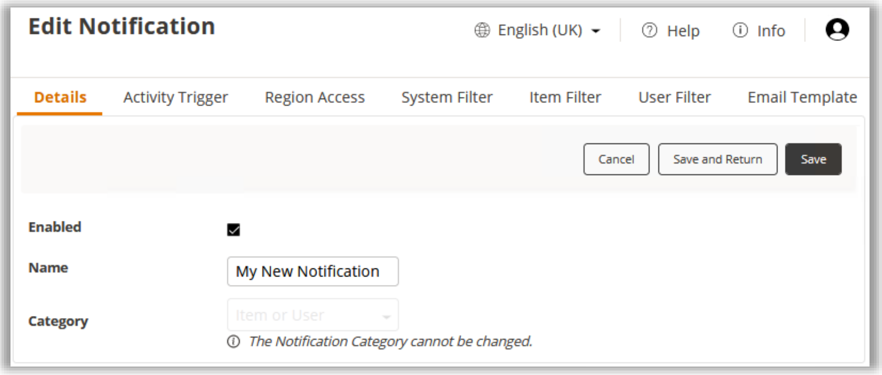
Once you have finished creating the Email Template, click on the **Finish** button.

6.6.4 EDITING NOTIFICATIONS

Should you wish to edit any 'Notifications' in the list, you can either double click on a Notification or select the Notification and click **Edit** as shown below. Depending on which 'Notification Category' was chosen at the start of the process, you will be directed to a new page showing all the specific options as tabs.



Selecting an individual tab will take you to its specific page for editing. When you have finished making your changes, click 'Save and Return'.

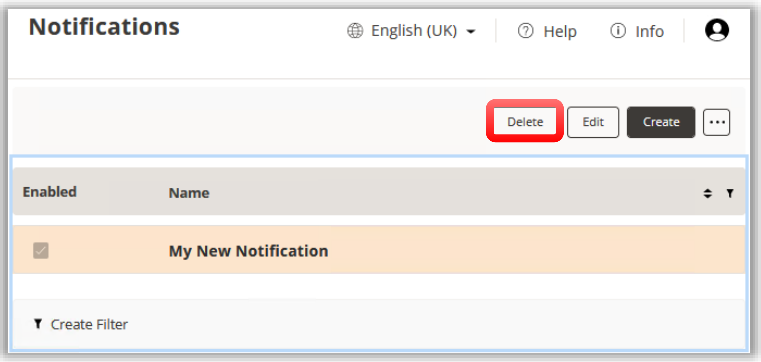


NOTE: It is not possible to change the 'Notification Category' whilst editing. Should you wish to do this, you will have to delete the Notification and create a new one.

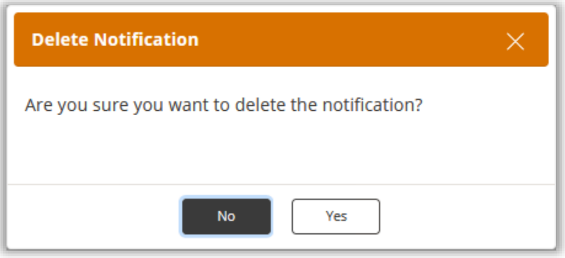
Please now refer to the Using Email Notifications section.

6.6.5 DELETING AN EMAIL NOTIFICATION

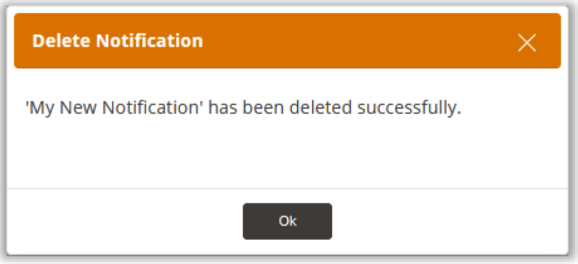
To delete an existing email notification, select the notification and then click on delete.



You will then be asked to confirm your choice.

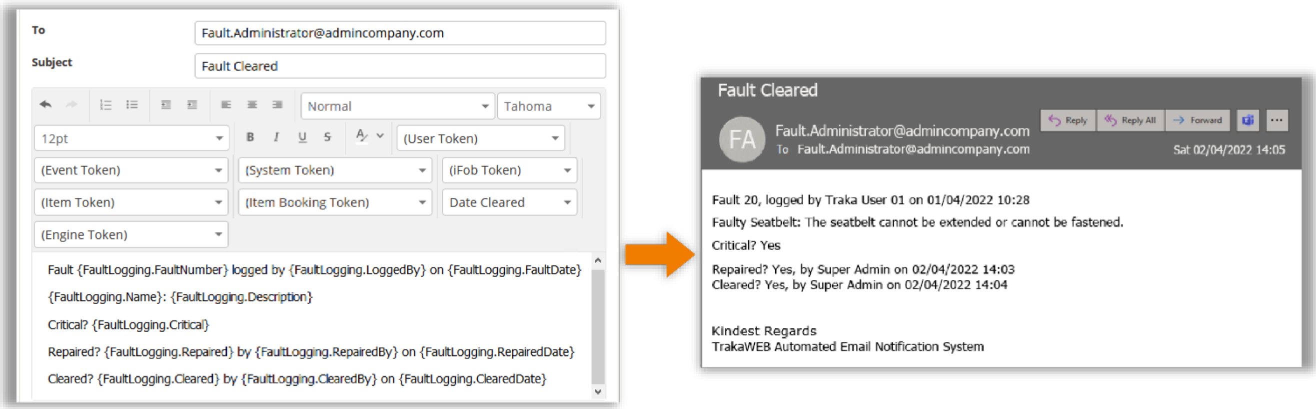


Click on **Yes** if you wish to delete the Notification. A confirmation window will now appear. Click on **OK** to continue.



6.6.6 USING EMAIL NOTIFICATIONS

Once you have set up your Email Notification and it is enabled, you will begin to see notifications come through to the specified email addresses. For this example, the following details have been saved as an email notification.



NOTE: This is just an example of how the email notification system works. You can set up many different notifications with very different activity triggers.

1. The user who has been identified with this particular notification accesses the corresponding system.
2. They then interact with the appropriate item from the system in the way selected as one of the Activity Triggers for the Email Notification.
3. Once the trigger has been activated, the notification will be sent to the email address entered against the notification.

6.7 ITEM BOOKING

Item Booking is a cost option feature, which allows items to be reserved for a specific set of users over a specified time period.

Typical examples of this functionality may include reserving a meeting room, a company pool vehicle, or access to restricted areas and items. Item Booking can also be enhanced with the utilisation of Exception Alerts incorporating Email Notifications. Booking Confirmation Emails are created within TrakaWEB Admin. Furthermore, sub-configuration options are available which can:

- Automatically cancel a booking if associated items have not been taken within a set time from the start of the booking
- Automatically end a booking once all associated items have been returned as opposed to waiting for the end of a booking period
- Configure a limit as to how far in the future a booking can be made for all users

Item Bookings can be created and edited through TrakaWEB or the Integration Engine and are not editable at Traka Touch. For more information on creating and editing Item Bookings through the Integration Engine, please refer to **UD0273 – Traka Integration Engine Version 3 Installation Guide.**

NOTE: A Traka Touch System will record items as late if a System Lock Out has prevented the return of these items on time. For further information, please refer to UD0090 – Traka Touch Lockers User Guide or UD0258-Traka Touch Pro User Guide.

If a single item is part of an Item Booking, then any user having access to that item would observe that:

- During the 12 hours before any booking on that item may start if the item is taken, a message will be displayed advising of the booking details and when the item should be returned
- During the time the booking may last, permissions on that item will be removed. So thus, during an active item booking the user having access to the item will lose it (unless the user may have enabled the item booking override, as explained in the **Restrict Future Bookings** section). That time depends on the booking start, booking end, and the sub-configuration options
- Once the booking has finished, the user automatically will recover the permissions over that item

6.7.1 ITEM BOOKING - FIXED RETURN OVERVIEW

Item Booking is currently only available on Fixed Return Key Control and Locker Systems, which are not configured to operate as 'First in First Out' or 'Temporary Deposit Locker' modes.

Item Booking allows an item to either: be allocated to an end-user by an Administrator or, for users to login to TrakaWEB and create bookings for themselves when they have been given a special software permission. This permission can be given to users in isolation, therefore allowing them to be able to login and create a booking for themselves but not access any other areas of TrakaWEB.

The Booking Wizard ensures that the Booking process is simple and straightforward. It prompts the user for information such as where the item is being taken from, when the booking will be active and what is being booked. It guides the user step by step through all the stages of the booking process. The Wizard also ensures that duplicate bookings cannot be made and that region visibility rules are fully considered.

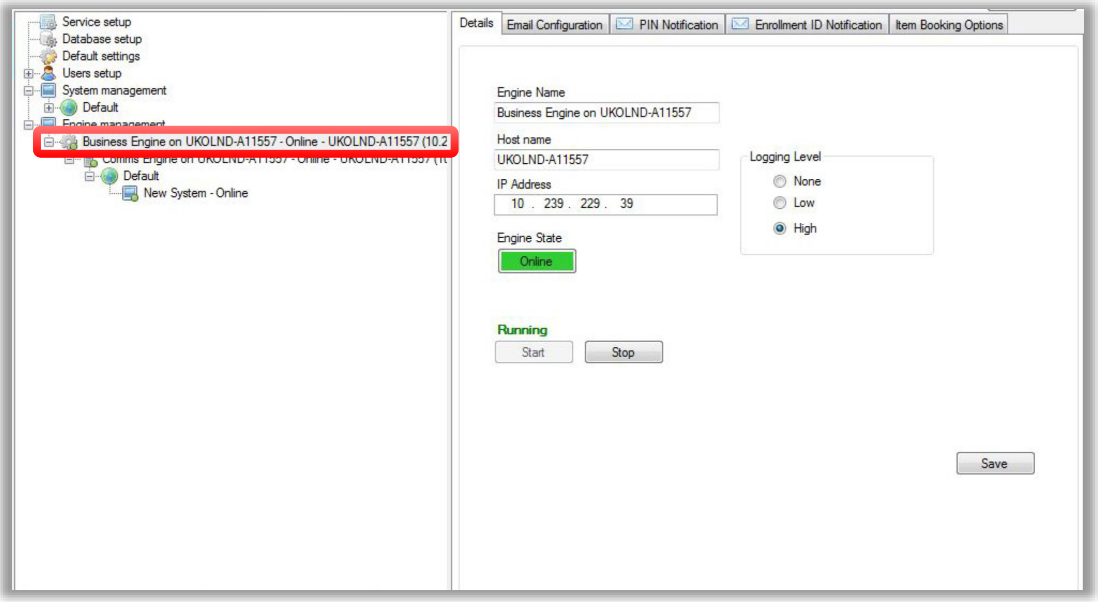
A summary page displays all bookings made by a particular user with a Gantt chart. The chart offers zoom functionality to allow bookings to be viewed over a time period between 1 hour and 1 year.

An individual Traka Touch system will store up to 1,000 current/future bookings at any one time. TrakaWEB can store an unlimited number of bookings across all systems.

6.7.2 CONFIGURING THE MAXIMUM NUMBER OF ITEM BOOKINGS

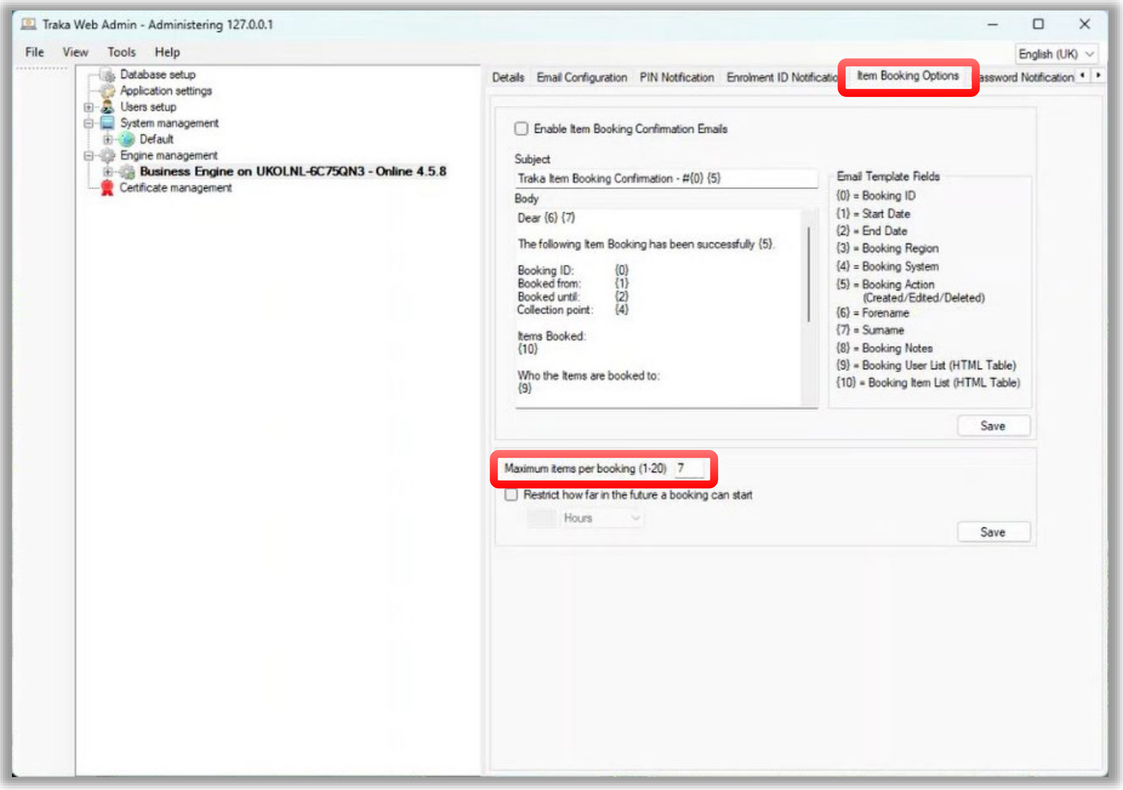
From within the **Item Booking Options** tab in the Admin App, it is possible to set a limit on the maximum number of item bookings. The default value is set to 5 but this can be changed to a configurable value between 1 and 20.

1. Within the TrakaWEB Admin App, select the **Business Engine.**



2. Next, select the **Item Booking Options** tab.

3. Change the value for the **Maximum number of items per booking (1-20)** to the required number between 1 and 20.

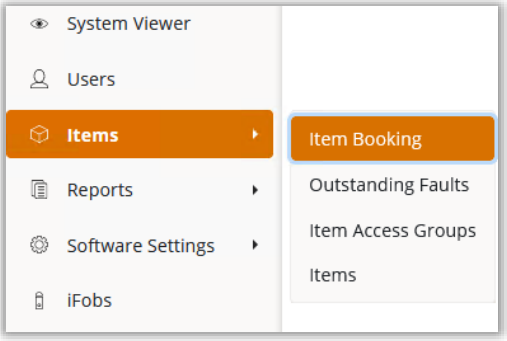


4. Once completed, click on the **Save** button.

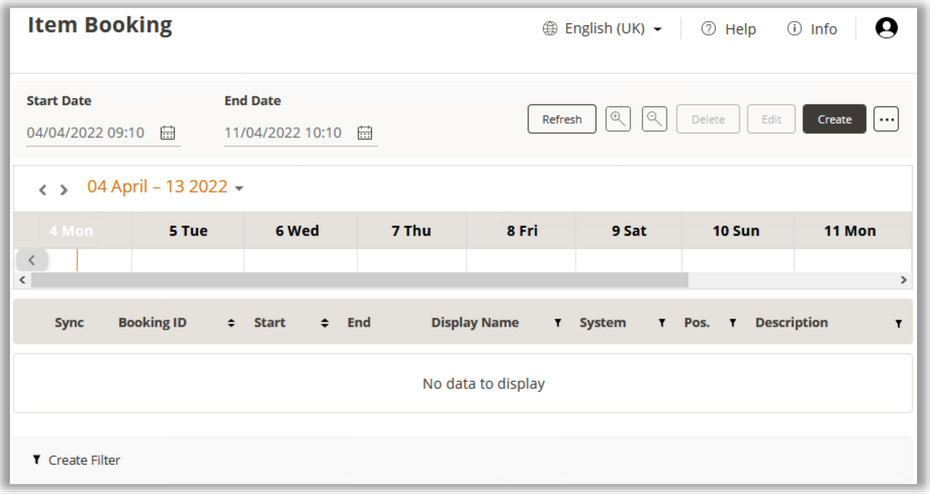
6.7.3 THE ITEM BOOKING LANDING PAGE

The option to navigate to the Item Booking Landing page in TrakaWEB is located in the Navigation Menu.

1. Click on the **Items** button and then select **Item Booking**.

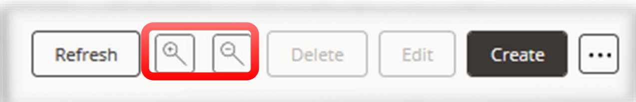


You will now be taken to the Item Booking Landing Page as shown below.



Many of the icons on the Toolbar will appear familiar. You will however notice the addition of 2 magnifying glasses.

NOTE: The zoom features can be used to view details on the Gantt chart once a booking has been created. Because the timescale used within Item Booking can vary between 1 hour and 1 year, you can zoom in to view Bookings set to smaller increments of time or zoom out to view bookings set to larger increments of time.



6.7.4 THE BOOKING WIZARD

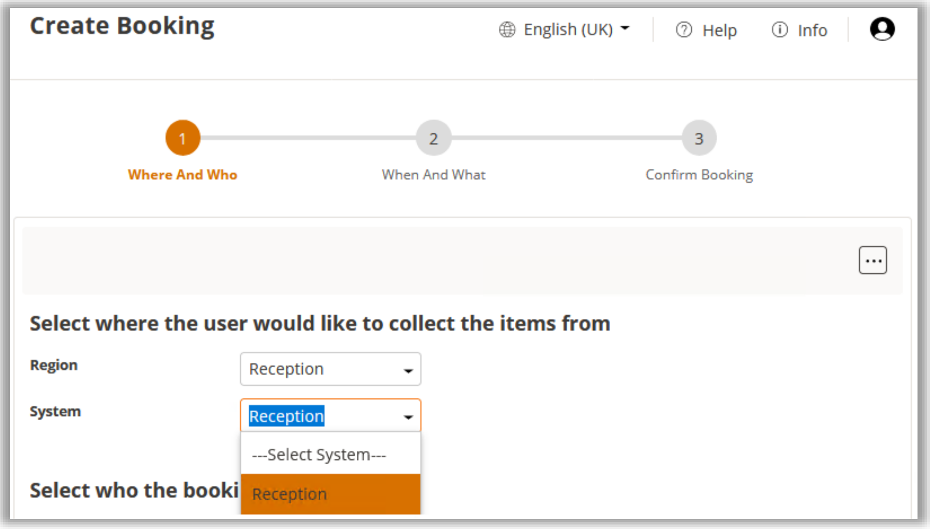
1. From the main Landing page, click on the **Create** button.

Only a user with Administrator access will be able to set up a Booking. This is a 5-step process, divided up over 3 pages. The first page displays the first 2 steps, and the second page displays steps 3 and 4.

6.7.4.1 WHERE AND WHO

Step 1/5 - Select where the user would like to collect the items from

1. From the drop-down menus, select the specific Region and System.

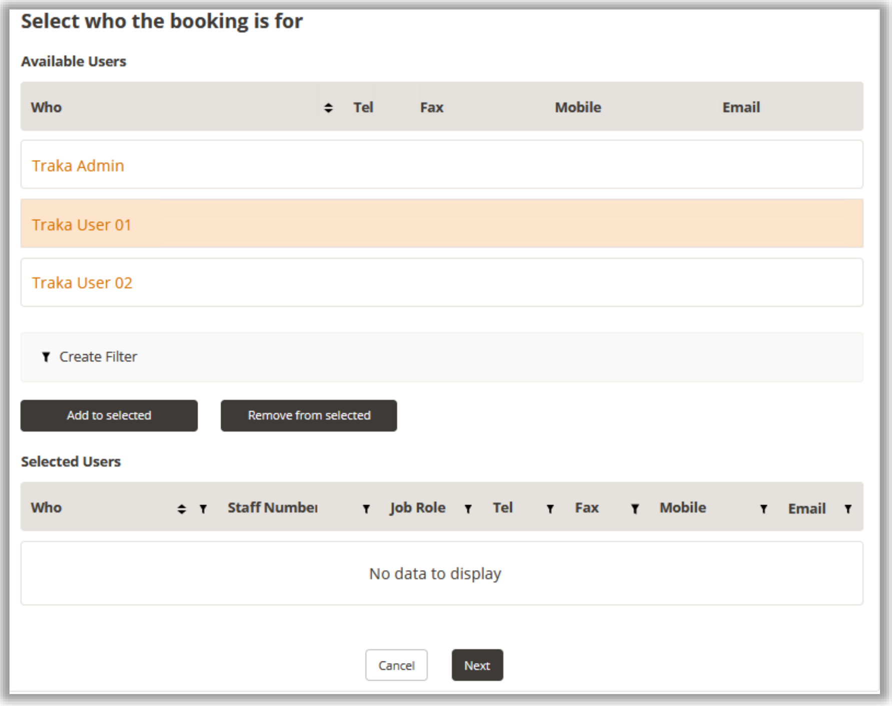


Step 2/5 – Select who the booking is for

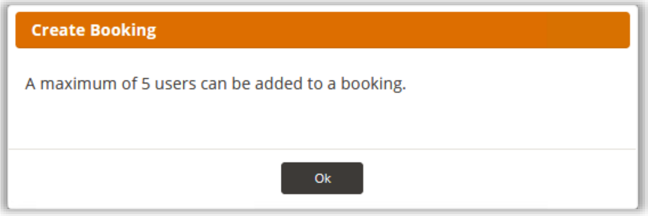
NOTE: Only active and effective users on the selected system holding the item will be eligible for an item booking. If any user is not 'effective' and 'active' on the selected system, that user will not appear in the list of users to be selected.

1. Select the user you wish to create the booking for. You can either double click next to the name or click on **Add to Selected**. The selected name will be added to the 'Selected Users' field.

NOTE: If you click on the actual username, you will be redirected to the Edit User page and will have to navigate back to the Item Booking page and start over.



A maximum of 5 users may be added. Should you attempt to exceed this amount; a message will appear. Clicking 'OK' will close the message.



Click on **Next** when you have selected the Region, System, and the User(s) the booking is being made for.

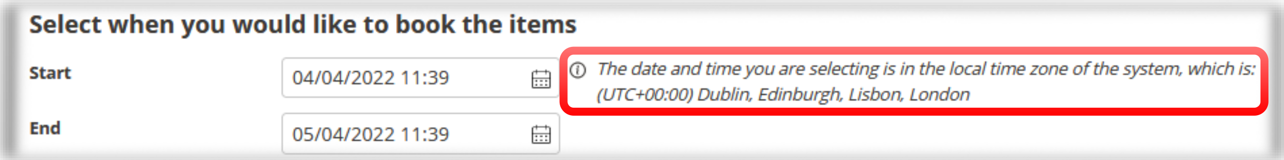
6.7.4.2 WHEN AND WHAT

NOTE: If at any time, you wish to make a change, click on the 'Back' button to return to the previous page.

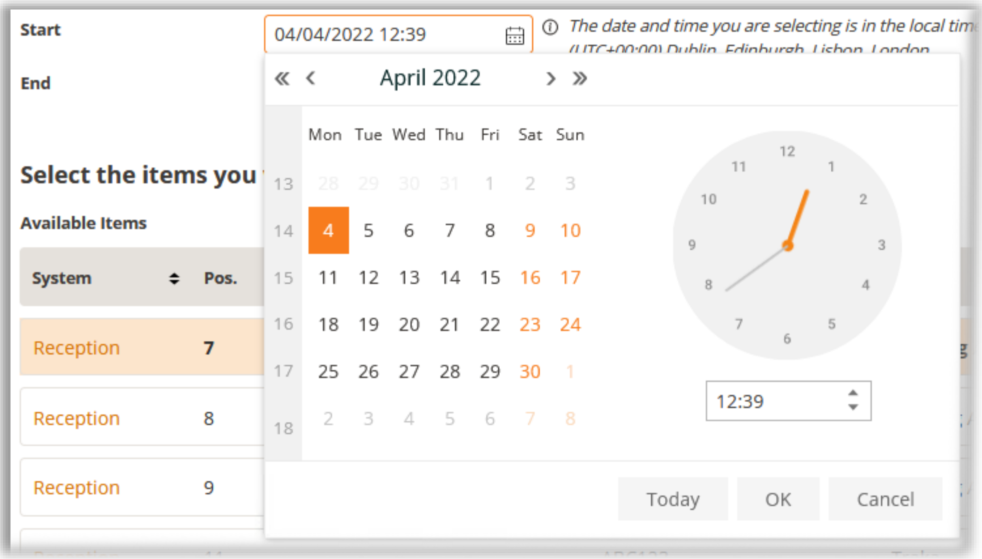
Step 3/5 – Select when you would like to book the items

The next page will continue with the next 2 steps of the process.

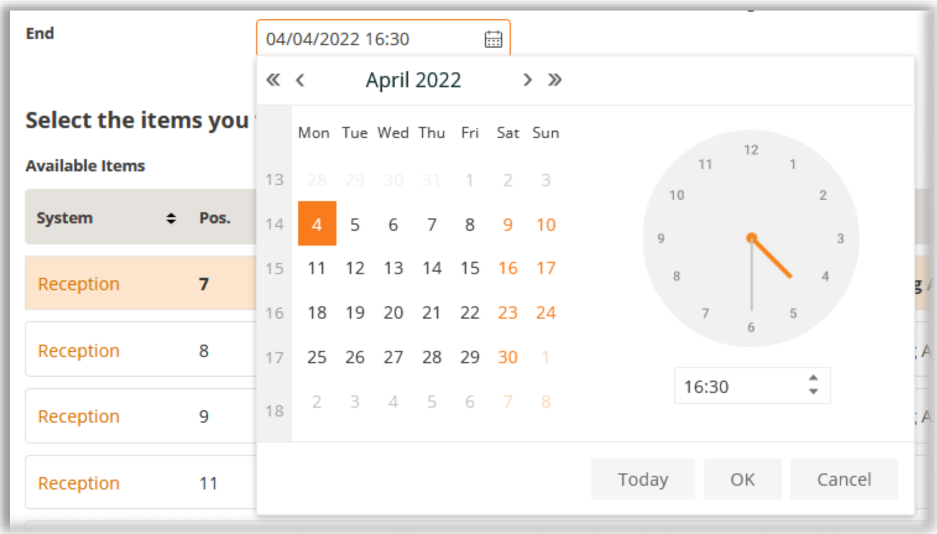
NOTE: The date and time chosen for the booking is in the local zone of that system. The time zone of the system is displayed within the booking wizard, as seen in the screenshot below.



1. Click on the **Start** drop-down and either manually type in the date and time when your booking will start or click on the calendar icon at the right end of the field to open the date selection tool.



2. Select when the booking will start. Then click **OK**.
3. Click on the drop-down menu for **End** and either manually type in the date and time when your booking will end or click on the calendar icon at the right end of the field to open the date selection tool.

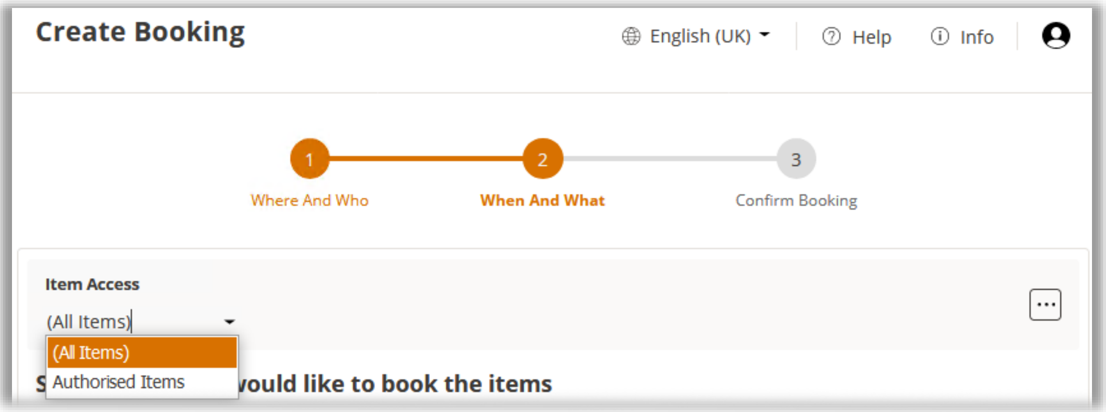


4. Select when the booking will end then click **OK**.

Once you have made a selection, you can progress with setting a start and end duration for the booking.

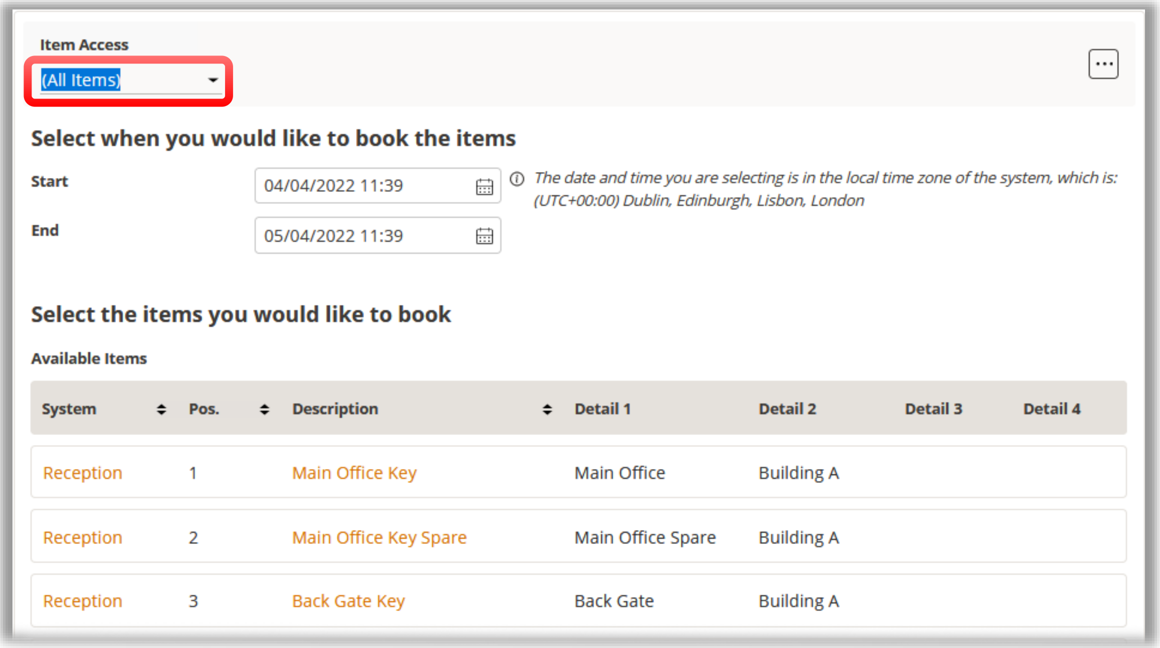
Step 4/5 – Select the items you would like to book

At the top of the page, there is a drop-down filter option which may be set as **All Items** or **Authorised Items.**



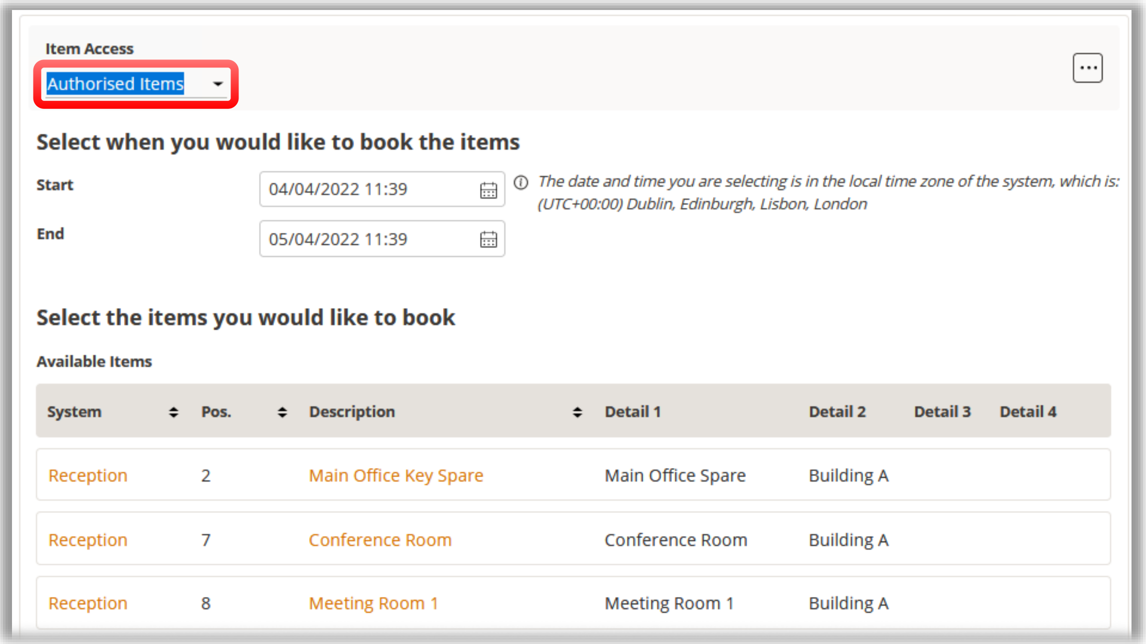
NOTE: The filter options are dependent on whether the 'Unrestricted Software Item Access' option is ticked in Software Permissions Groups.

With the **All Items** filter enabled, any Item may be booked for a user regardless of whether or not they have access to it.



NOTE: This option will only be available if the 'Unrestricted Software Item Access' option is ticked in the Software Permissions Groups.

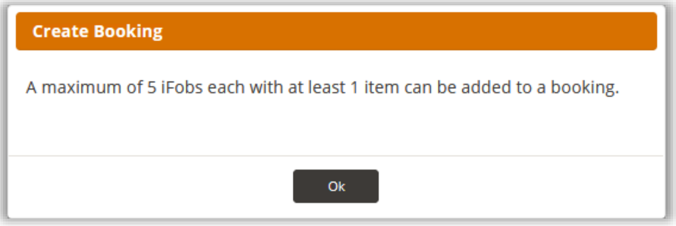
From the dropdown menu, the filter may be changed to **Authorised Items.** With this enabled, a user may only book items that they have been assigned access to.



NOTE: With the 'Unrestricted Software Item Access' option unticked in the Software Permissions Groups, this will be the only available option.

1. Select which items you would like to book. Either double click next to the item or click on 'Add to Selection' to add them to the Selected Items field.

A maximum of 5 items may be added. Should you attempt to exceed this amount; a message will appear. Clicking 'OK' will close the message.

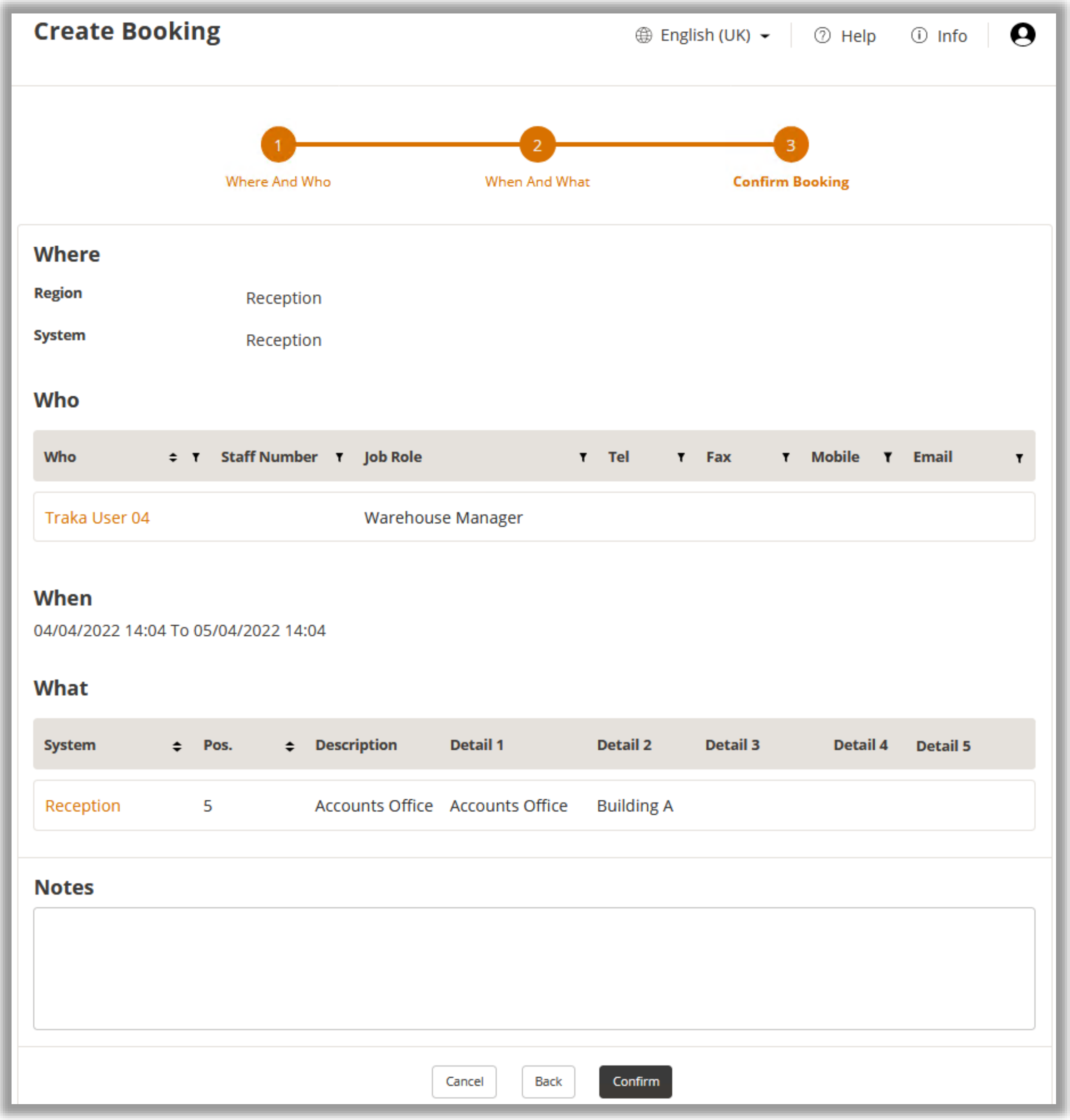


2. Once you have finished selecting items. Click on **Next** to continue.

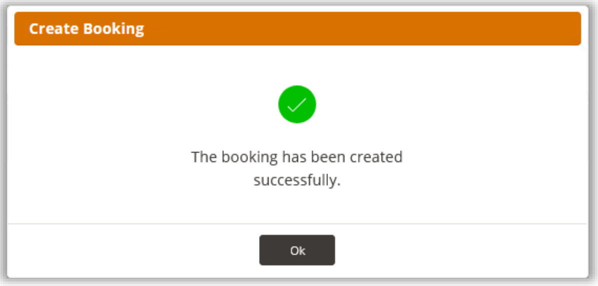
6.7.4.3 CONFIRM BOOKING

Step 5/5 – Confirm the booking

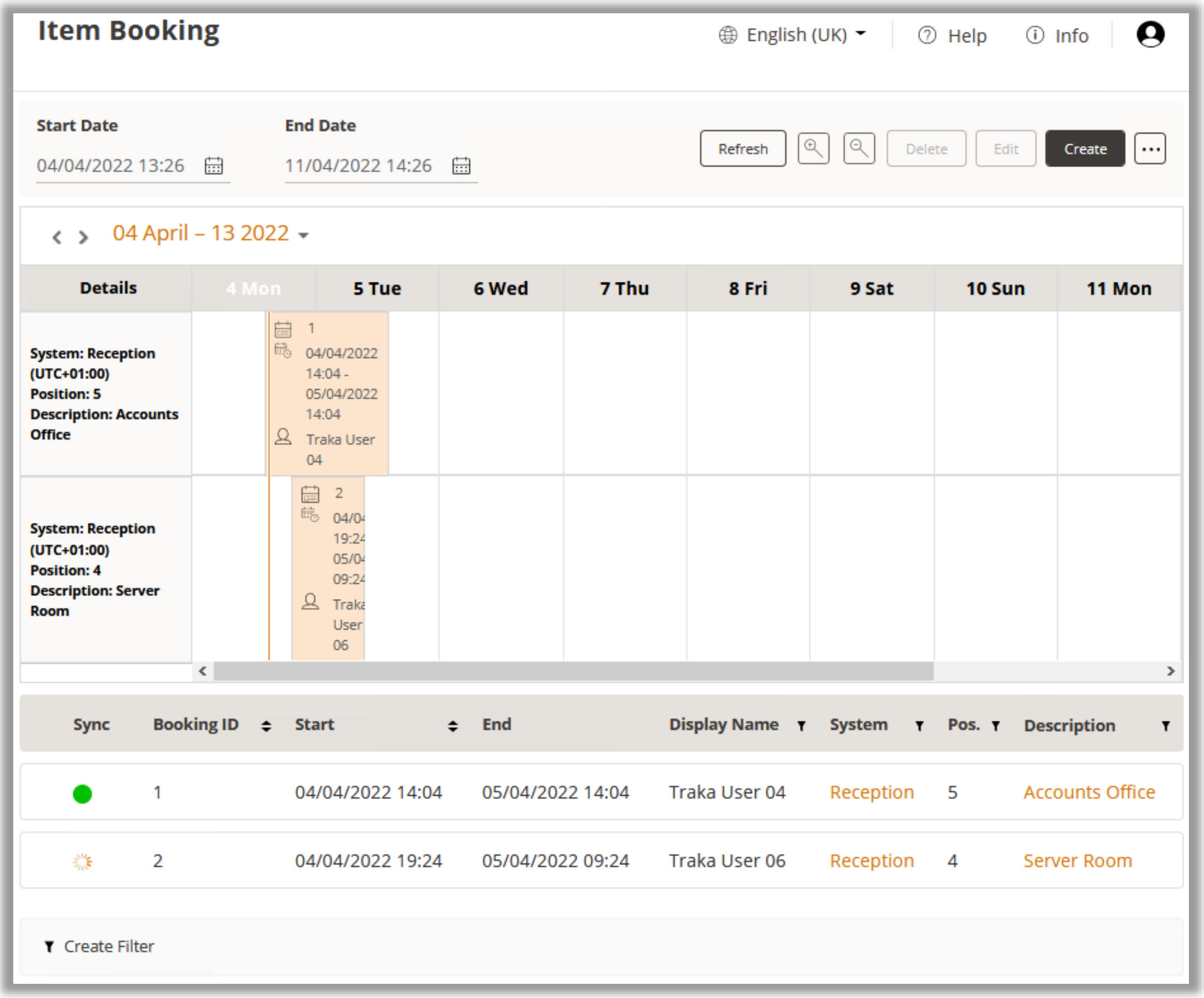
Step 5 will summarise the information entered from the previous 4 steps. If required, you can add notes in the space provided at the bottom.



1. If you are satisfied that the details are correct, click **Confirm** to continue.
2. A message will appear to inform you that the booking has successfully been created. Click 'OK' to close the message.



The Item Booking Landing page will display a Gantt chart showing a timeline for the booked items.



6.7.5 ADD EXTRA USERS TO AN EXISTING BOOKING

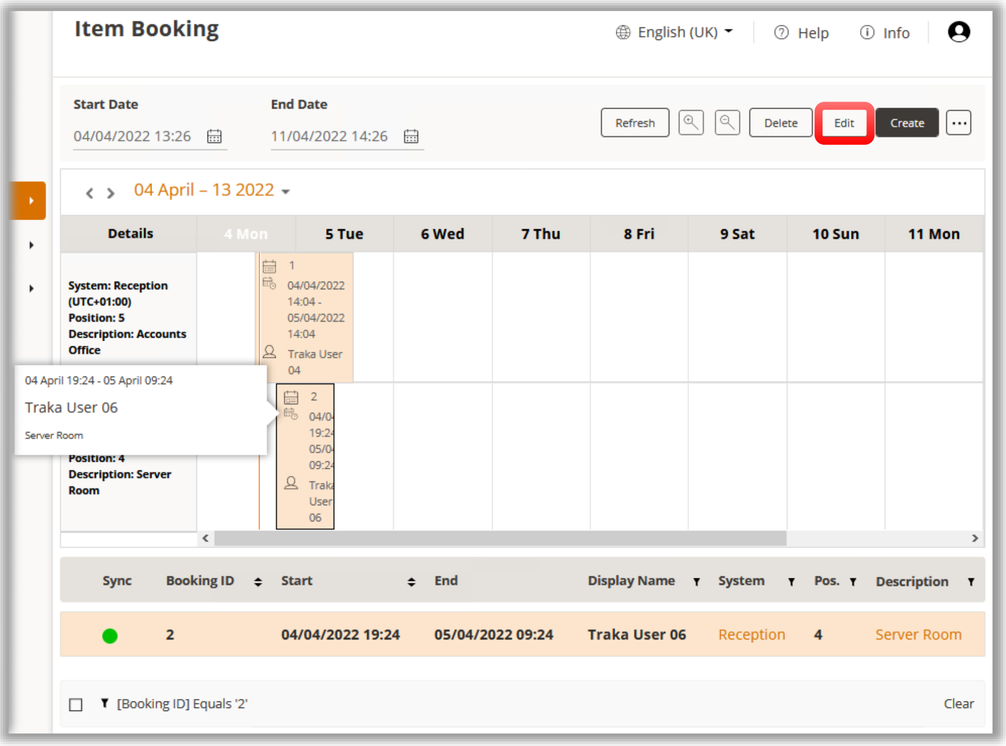
If required, additional users may be included to an existing booking. This will however still apply to a maximum of 5 users per booking.

NOTE: Only active and effective users on the selected system holding the item will be eligible for an item booking. If any user is not 'effective' and 'active' on the selected system, that user will not appear in the list of users to be selected.

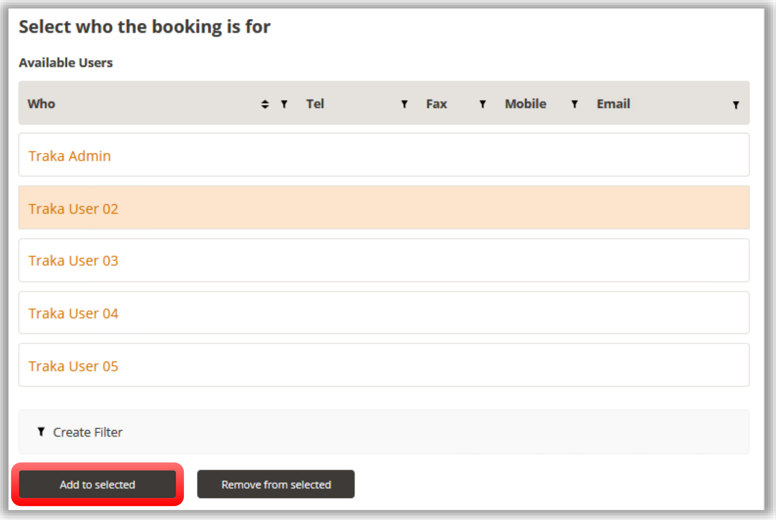
1. Select the **Item Booking** from the Navigation Menu.

The existing Item Booking chart will be displayed.

2. Select the booking that you wish to include additional users and then select the **Edit** button. This will then take you through the 5-step process.



3. From the available list of users, select the new user to be added to the selected booking.



NOTE: When adding extra users, any items that the editing user has not been granted access to, will be removed from the booking.

Once completed, click on **Next** and make any further changes as required.

6.7.6 ADD EXTRA ITEM BOOKINGS

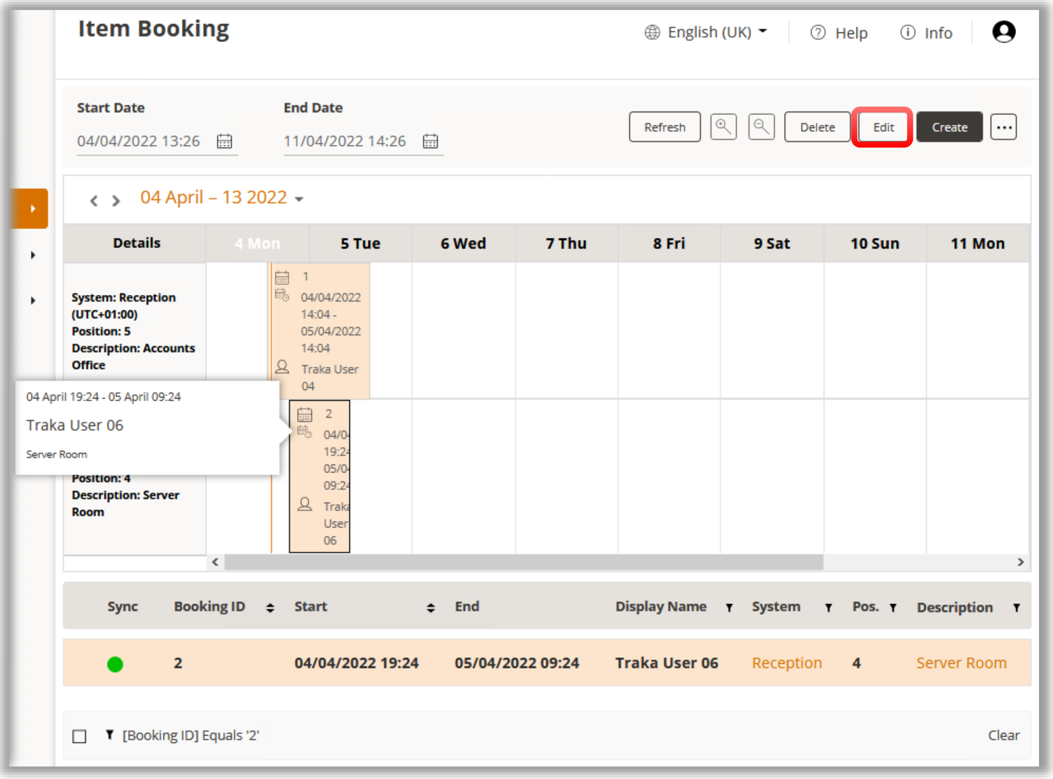
If required, you may add extra bookings to the one already created.

1. Find and click on the **Item Booking** in the Navigation Menu.

The existing Item Booking chart will be displayed.

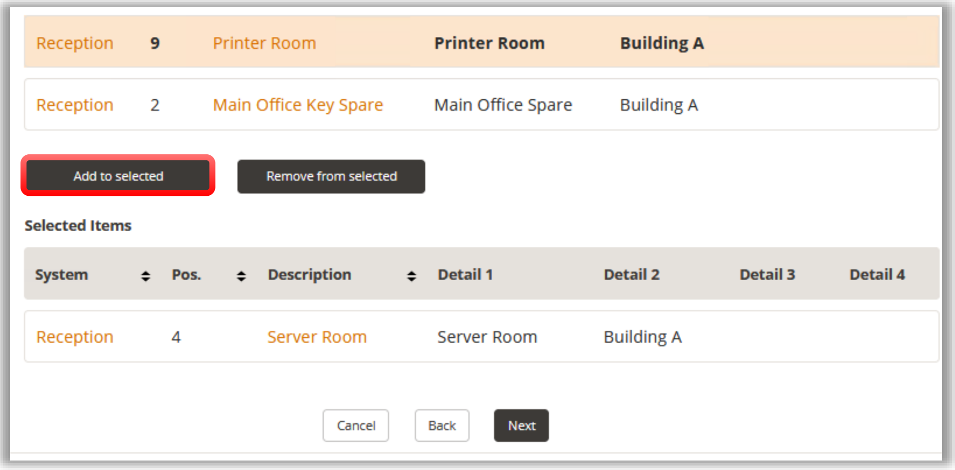
2. Click on the **Create** icon. This will take you back through the 5-step process to create another booking. Refer to one of the previous sections on how to create a new booking.

3. Alternatively, you can add more Items to an already existing booking. If that is the case, select an existing booking and click on the **Edit** button.



4. This will then take you through the 5-step process. Click on **Next** on the first page to get to the When and What page.

5. Select the Item that you want to add to the existing booking and click on the **Add to selected** button.

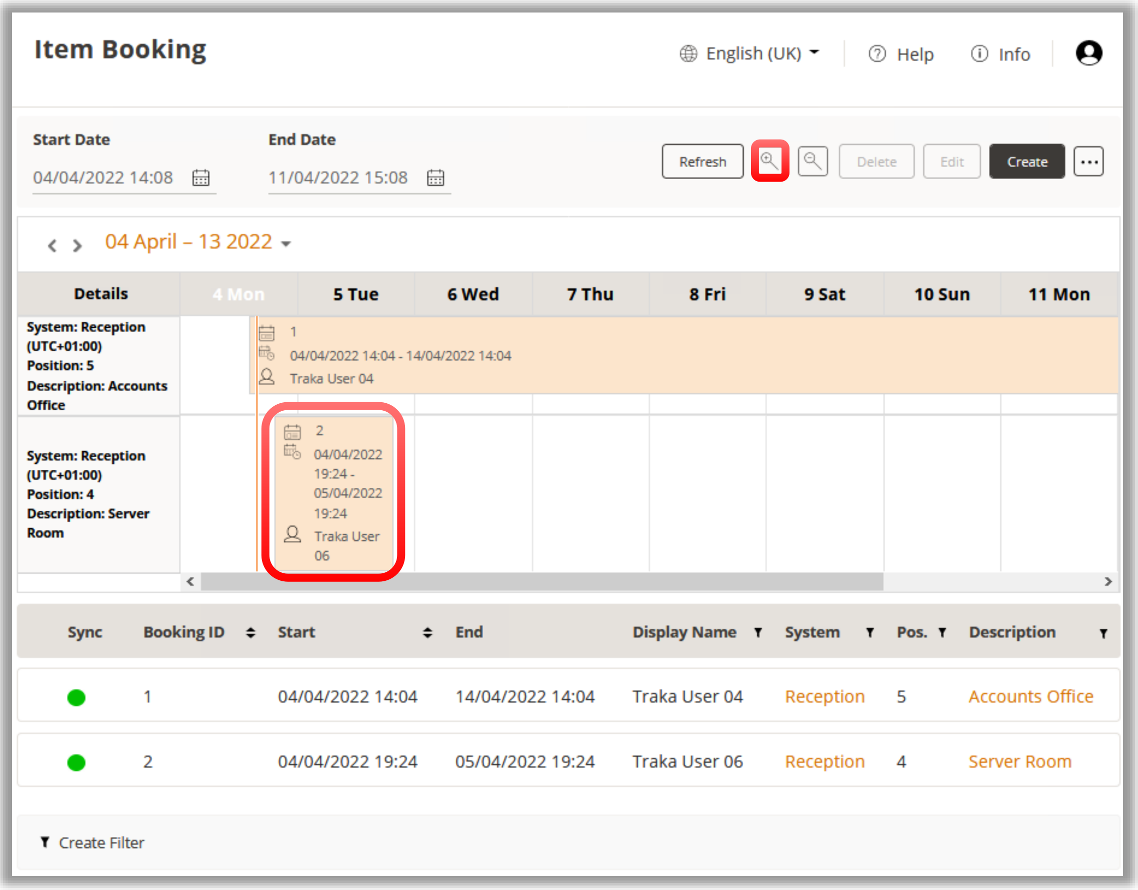


6. Click on **Next** to confirm the changes in your booking and save it.

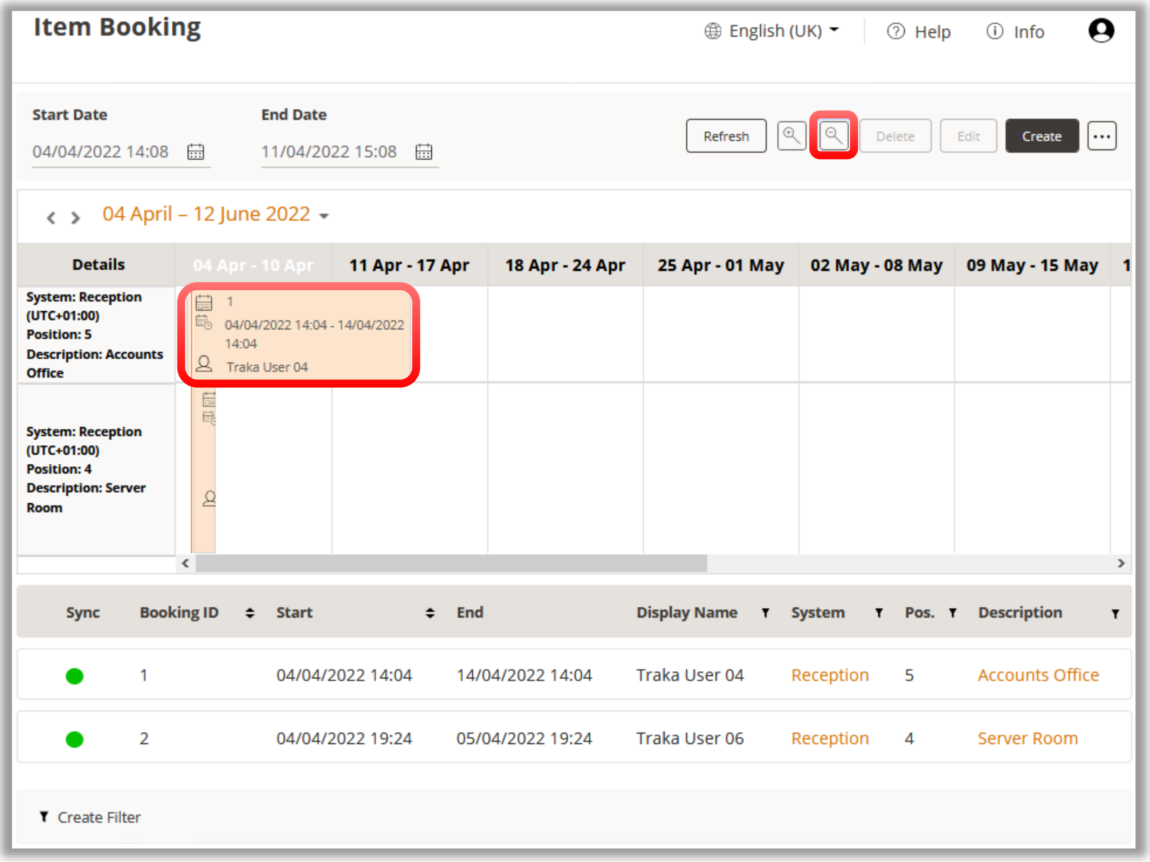
6.7.7 USE THE ZOOM FEATURE

The Zoom feature will allow the user to zoom in and out of the Gantt chart. This allows for easier viewing between bookings made for an hour and bookings made for up to a year.

The example below demonstrates 2 bookings made for 2 different periods of time. The zoom-in button has been used in this case to better view the booking details for an item over a period of 1 day.



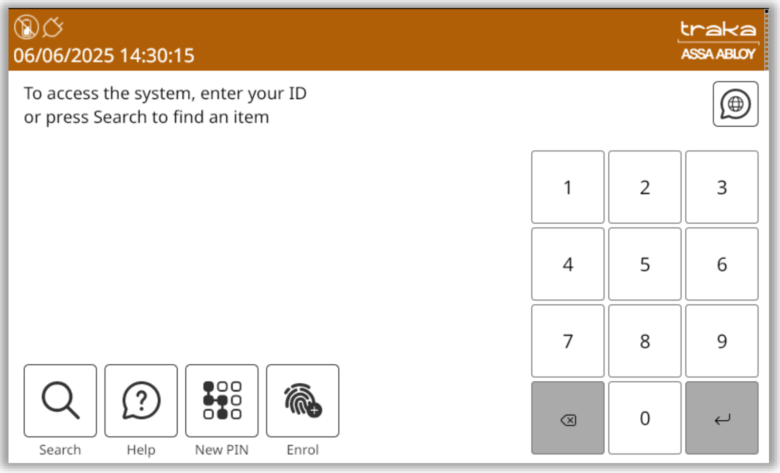
The example below shows the same booking, but the zoom-out feature has been used to view a booking made over a significantly longer period of time.



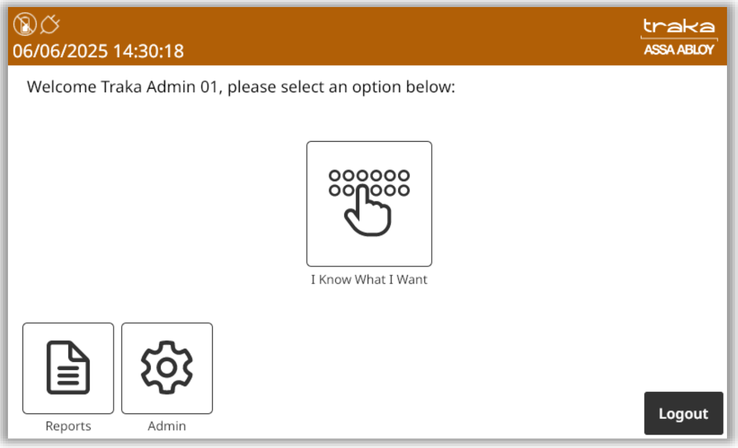
6.7.8 COLLECT BOOKED ITEMS

Once a user has booked an item, it will be accessible to them at the system.

1. Click on the screen to access the keypad.
2. Access the system by using your ID. This may include Keypad ID, Credential or fingerprint.

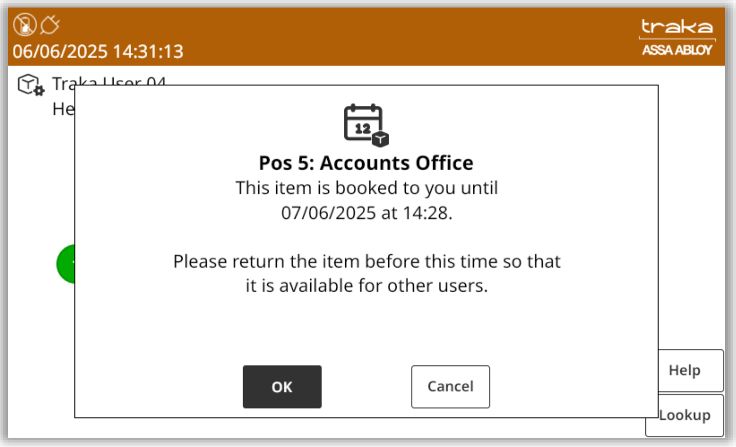


3. If the user logging into the system has the Admin role assigned to them, they will access booked items by selecting **I Know What I Want** as shown here.



If the user has the Standard User role assigned to them, the door will automatically open after logging in.

After the door has opened and the item is available to you, it will now be accessible. A message will appear on the screen providing you with the Booking information.



6.7.9 ITEMS NOT TAKEN

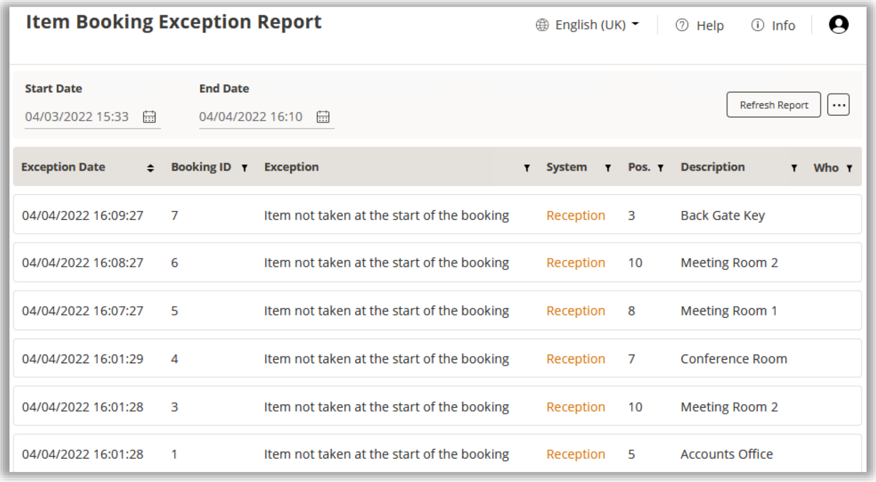
A sub-configuration option is available through Traka called **Item Booking Cancellation,** which can be enabled or disabled and is used to cancel a booking if the items have not been taken within a configurable timeframe from the start of the booking. For example, an Item Booking has been set to begin at 09:00 and the cancellation timeframe is set to 30 minutes. If the user attempts to remove the item at 09:35, it will already have been cancelled. Only one unit may be selected and the timeframe can be set as follows:

- 5-60 minutes
- 1-24 hours
- 1-365 days

If there are multiple items associated with a booking and some, but not all of the items have been taken, then the booking in this case will not be cancelled.

If a user only has access to items through Item Booking and the booking has been cancelled, they will no longer be able to gain access to the item unless they have been given Item Access to do so.

An exception report will be created in TrakaWEB showing a list of 'Items not taken at the start of a booking' as shown below.



6.7.10 END BOOKING UPON ITEM RETURN

A simple sub-configuration option called **Item Booking Cancellation** is available through Traka when Item Booking is enabled that will end a booking once one or all of the associated items have been returned to the system. This sub-configuration option has two different values: **At the end of the booking period** or **When all items are returned** and can also be used with the **Items not Taken** option.

It is not a requirement that all the associated items have to be taken and returned before this mode of operation is terminated. For example, if 3 items have been booked and only one has been taken, upon its return to the system, the booking will end. If users want to book multiple items, they should consider removing all the items at once or create an individual booking for each item.

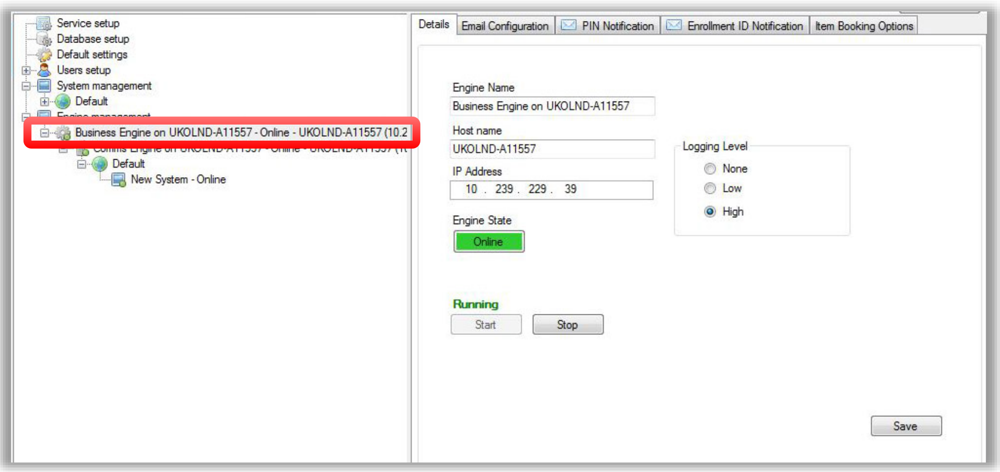
Traka Touch will monitor the return of items to the system, checking against active bookings and generate a 'Booking Ended' system event. This event will be shown in the System reports along with the booking reference number and the end date and time that the items were returned.

NOTE: A scenario may occur if the auto booking ending is enabled when all items are returned. One item is booked for user B, and there is another user, A that has enabled the item booking override. Although the booking is done for user B, user A can take the key because of the enabled override. If for any reason user A takes the item once the item booking starts and then the item is replaced, then the booking is automatically deleted by the system (as "the item(s) on the booking" has been replaced).

6.7.11 RESTRICT FUTURE BOOKINGS

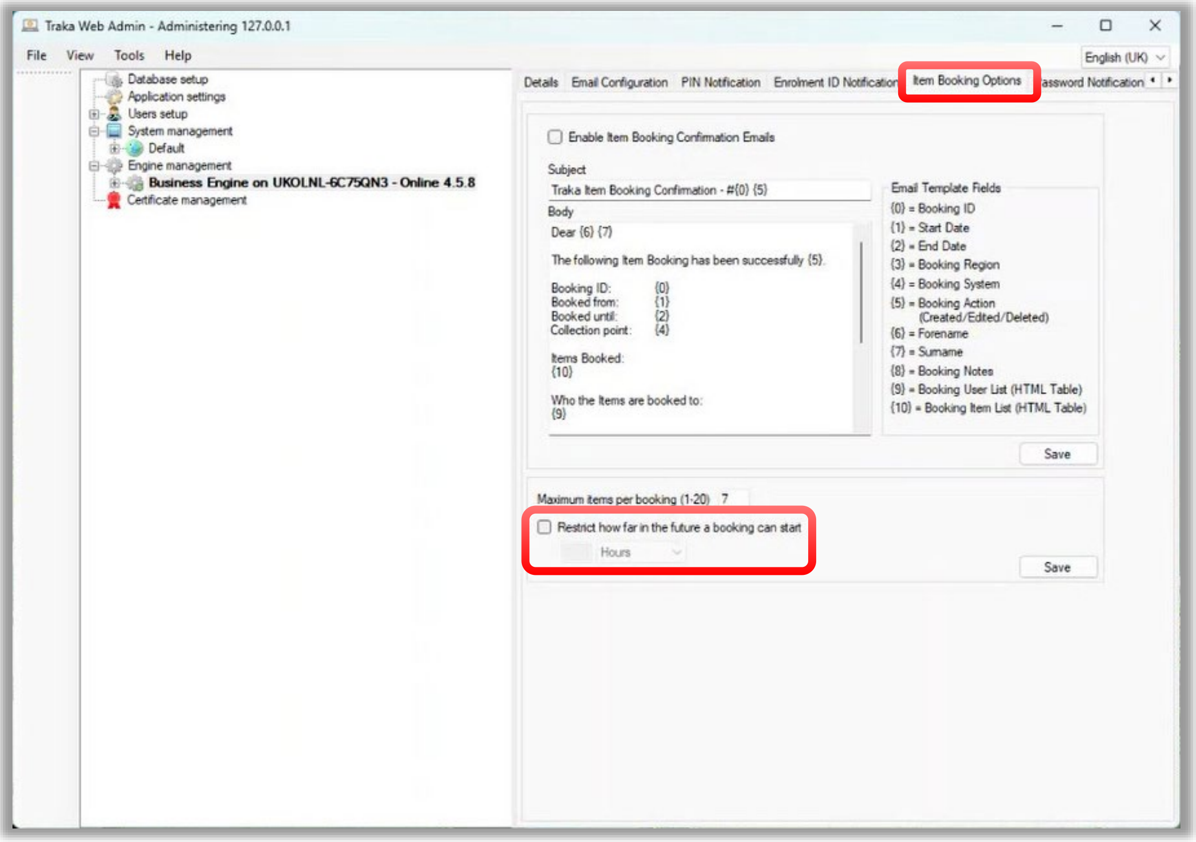
An option is available to configure how far in the future an Item Booking can be made for all users through TrakaWEB. This option is configured within the Admin App and will affect TrakaWEB only.

2. Within the TrakaWEB Admin App, select the **Business Engine.**

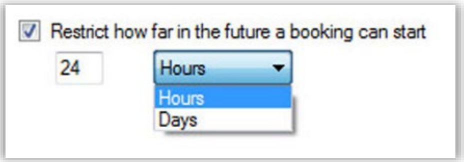


5. Next, select the **Item Booking Options** tab.

The option for the future booking restrictions is located at the bottom of the window as shown below.

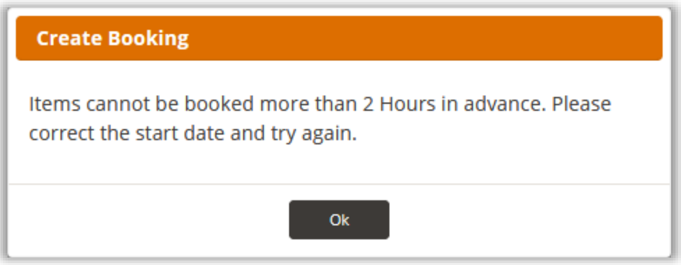


Once the checkbox has been enabled, the text box will default to 24 and the units will be in hours. The drop-down box will enable you to switch between Hours and Days and the number in the text box can be changed manually.



Once enabled, the Booking Wizard will enforce the booking restriction on creating or editing bookings for both Booking Users and Booking Administrators.

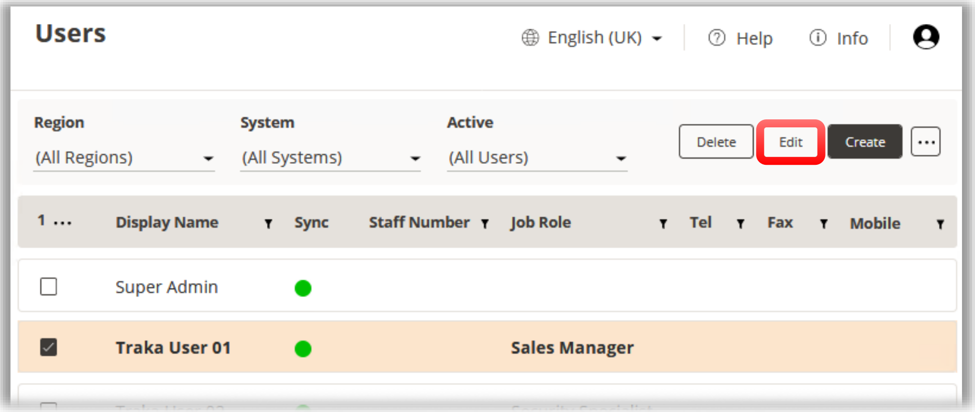
The start date restriction will be calculated against the current time of the selected system based upon its time zone. For example. If a 2-hour restriction time has been set in place and a user attempts to make a booking that falls outside of the 2 hour restriction, a warning will be displayed as shown.



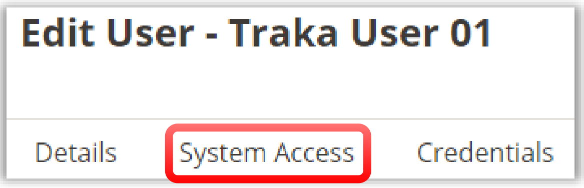
6.7.12 ITEM BOOKING OVERRIDE

The Item Booking Override feature allows a user with special permissions to book an item that already has a booking allocated against it.

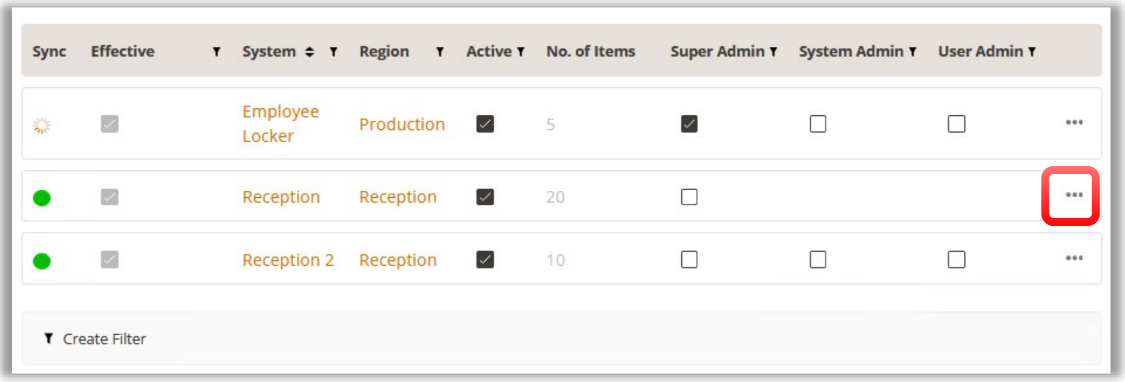
1. In the **Users** menu, select the user you wish to allocate the Booking Override permission to and then click the **Edit** button.



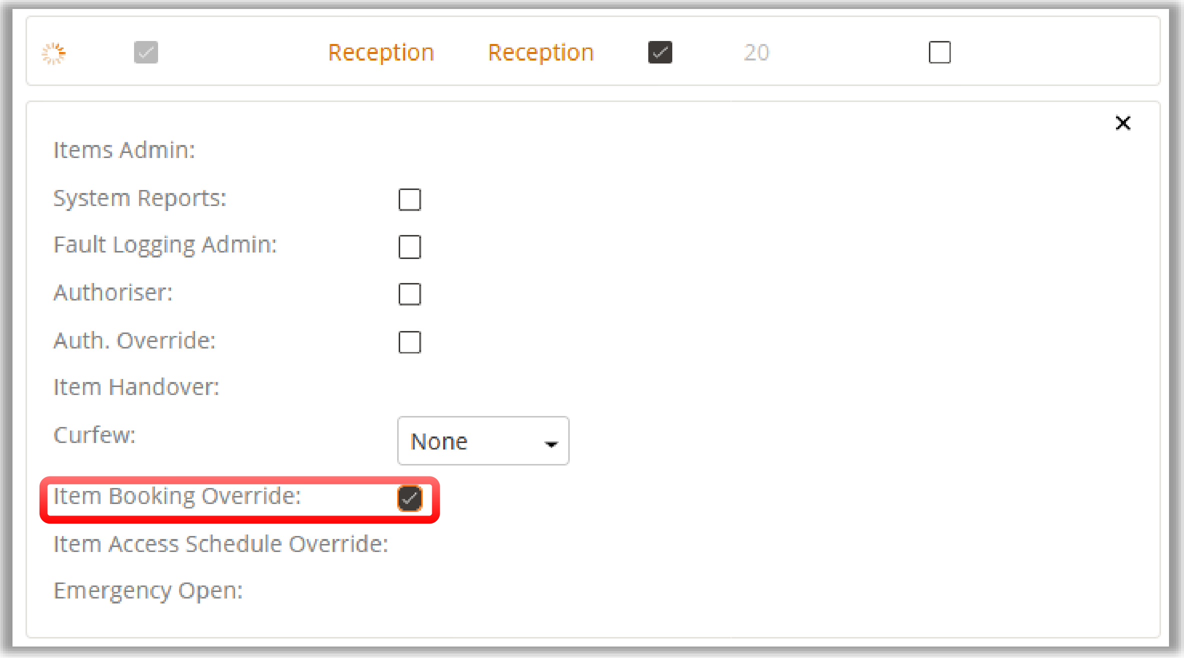
2. At the next page, click on the 'System Access' tab.



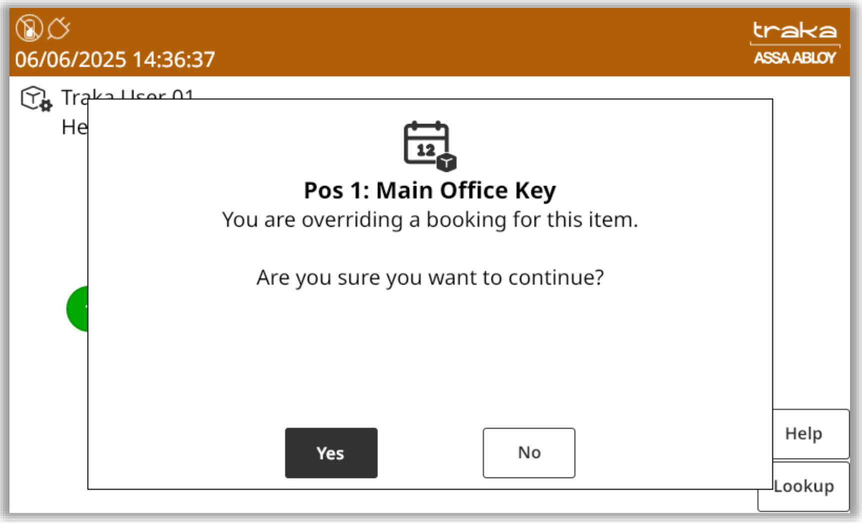
3. At the bottom of the 'System Access' page, find the system on which the user will be given the Item Booking Override permissions. Click on the **Ellipsis** symbol to the right of the system record to expand it.



4. A new panel will open. Find the check box under 'Item Booking Override' as shown below and check it.

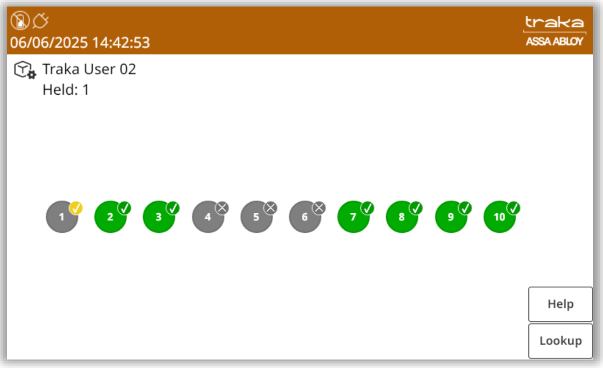


With the 'Item Booking Override' permission given to the user, they now have the ability to override an already booked item.

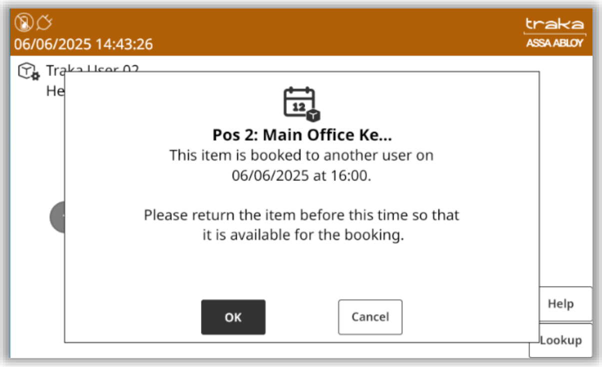


6.7.13 ITEMS BOOKED TO OTHER USERS

When a user has made a booking, the Traka Touch screen will display which items are already held by other users.

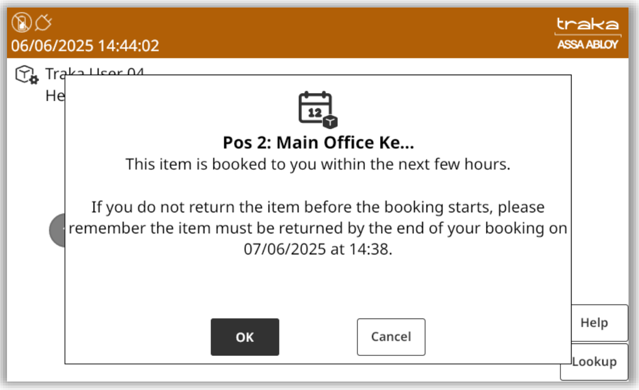


It is possible to access an item that is already booked to another user up to 12 hours before its next booking, so long it is still within the system. In this situation, the user will be advised of the booking details and when the item should be returned.



NOTE: If a user takes an item before the next booking begins and fails to return it before that time, the system will record an 'Item not returned prior to booking' event.

A user may also remove an item that is already booked to them up to 12 hours prior to when the booking period is due to commence. In this instance, the system will remind the user to return the item by the end of the booking.



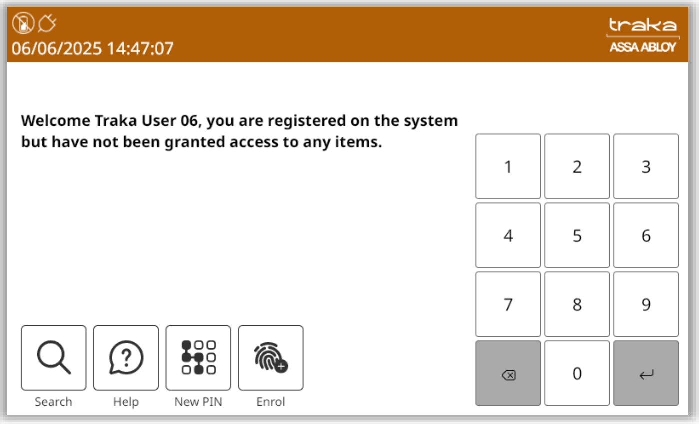
NOTE: If a user takes an item before or during a booking and fails to return it before the booking ends, the system will record an 'Item not returned at the end of the booking' event.

NOTE: Exception Alerts can be created in the form of Email Notifications to inform users when items need to be returned or when items have not been returned to the system. This is particularly useful for back-to-back bookings.

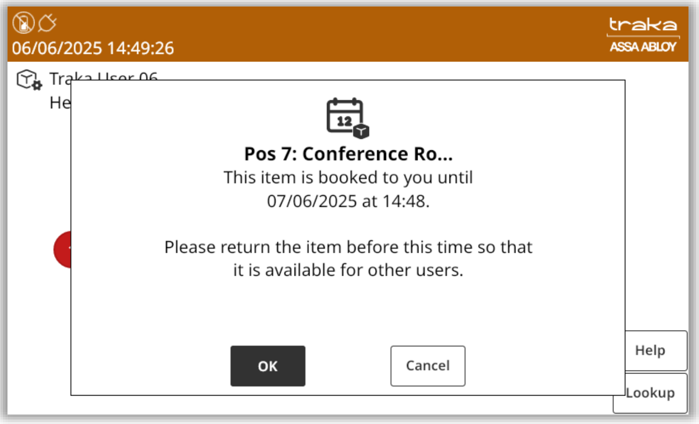
6.7.14 ACCESS RESTRICTIONS

A situation may arise whereby an administrator would only want certain users to only have access to items via an Item Booking. Therefore, when the user has no active bookings, they are unable to access the system. This can be done whereby the user is given login credentials and is set as active on the system but not granted access to any items. A typical example of this may be where the user requires access to cleaning materials during a specific work shift, but not at any other time.

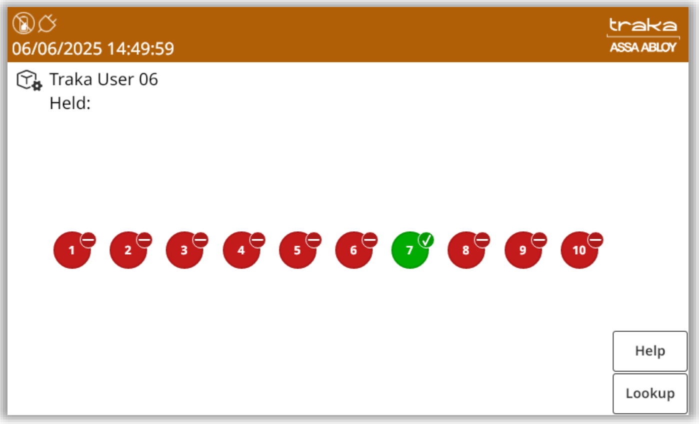
When the user enters their ID at the Traka Touch Screen and they have no active bookings, they will see the following screen.



However, when a single item is granted to the user via a booking, the Traka Touch screen will display a message stating which item they have access to, and the time restrictions applied.

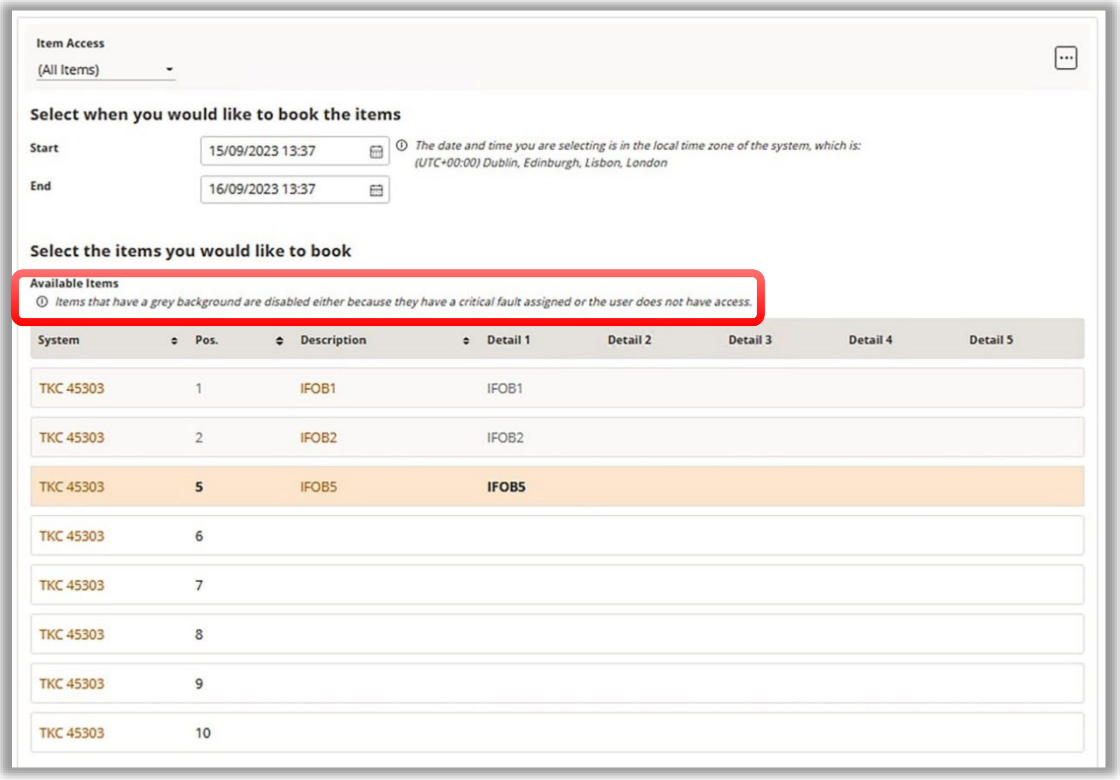


The user can then remove and return the item at the system in the usual way.



6.7.15 ITEM BOOKING CRITICALLY FAULTED ITEMS

When using Item Booking with the Fault Logging feature enabled, items that are listed with a critical fault may not be added to a booking. Critically faulted items will be displayed in grey, and a message will indicate that those items have been disabled either due to a critical fault or the user does not have access. However, this does not apply to non-critically faulted items.

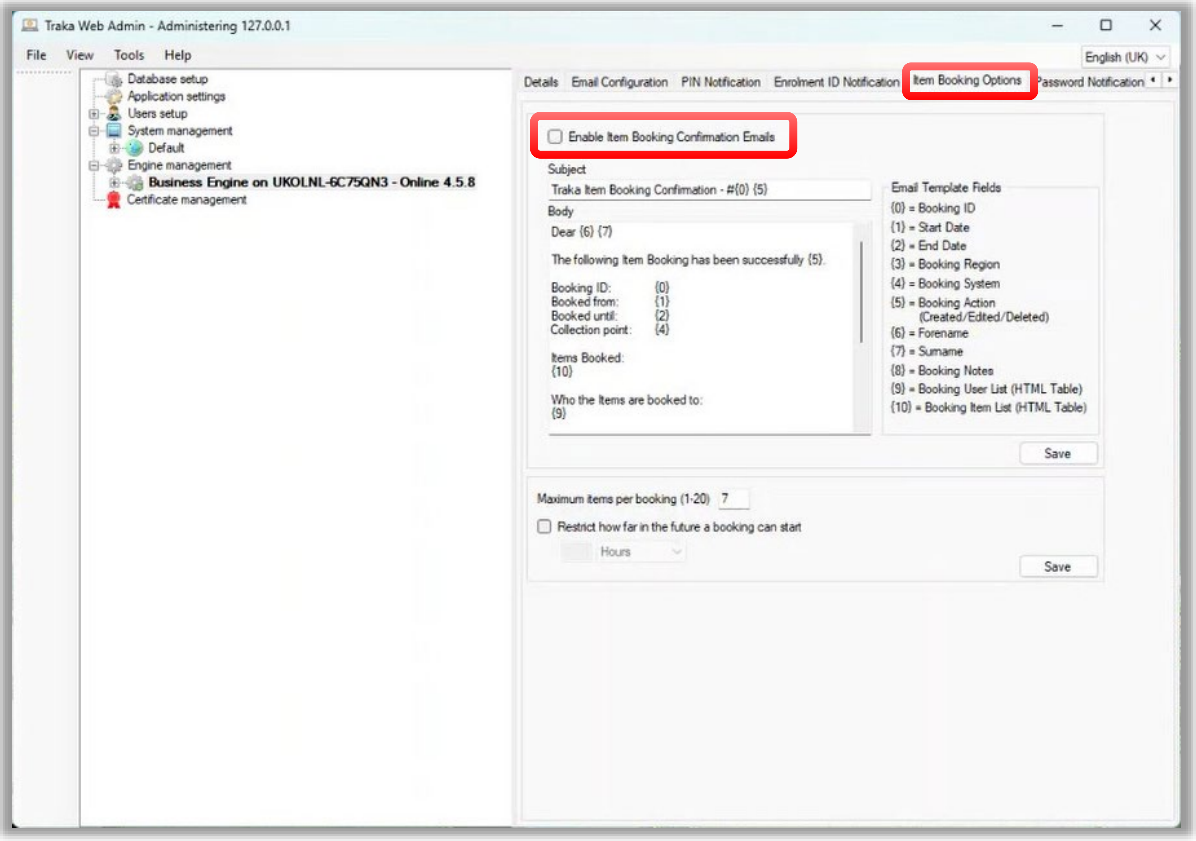


6.7.16 ITEM BOOKING CONFIRMATION

The ability to enable the Item Booking feature to send confirmation Emails is set up within TrakaWEB Admin App.

1. Within TrakaWEB Admin App, click on the 'Item Booking Options' tab.

2. Select the 'Enable Item Booking Confirmation Emails' checkbox.



You will be able to use placeholders to populate each individual field with information relating to the Email confirmation you wish TrakaWEB to send to users, including email address, subject and the main body of text for the notification.

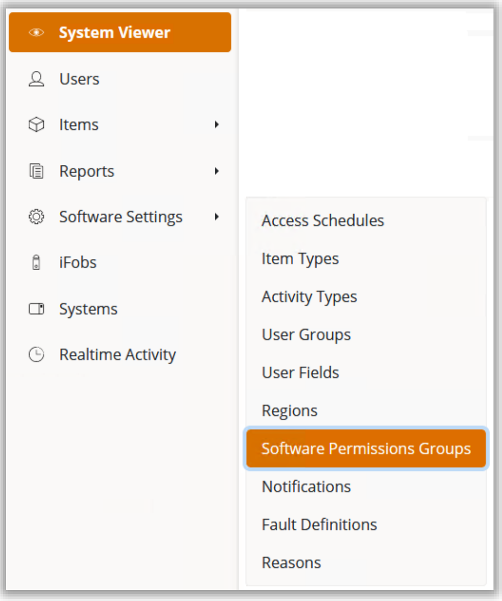
3. Once you have created the notification, click on the **Save** button.

6.7.17 SOFTWARE PERMISSIONS GROUPS

Special software permissions can be given to users to allow them to create or amend their own bookings. Likewise, permissions can also be given to create bookings for other users which could be granted to a booking administrator.

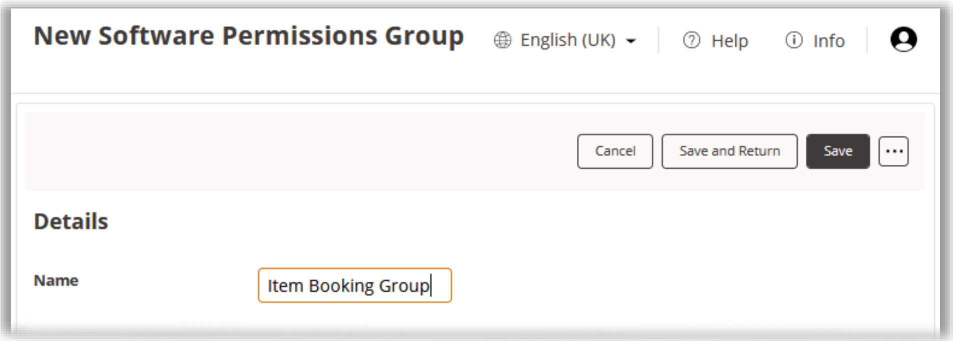
The software permissions can be restricted down so that only the booking summary page and Booking Wizard are accessible to the end-user, making an effective self-booking portal environment. Alternatively, users can be granted access to the other areas of TrakaWEB as well.

1. From the Navigation Menu, click on the **Software Settings** and then select **Software Permissions Groups**.



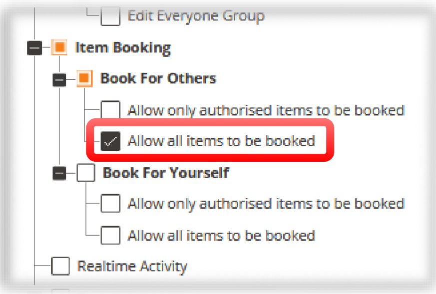
2. You will now be taken to the 'Software Permissions Groups' page. Click on the **Create** button to continue.

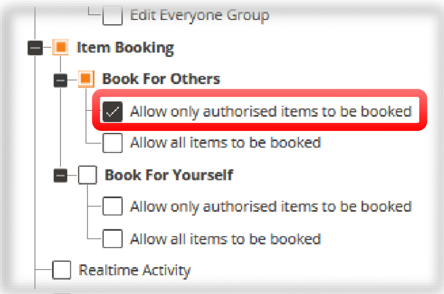
3. At the next page, you can insert the name of your Software Permissions Group.



4. Expand the Permissions tree and select the check boxes for the specific Permissions as shown in the examples below.

Book for Others



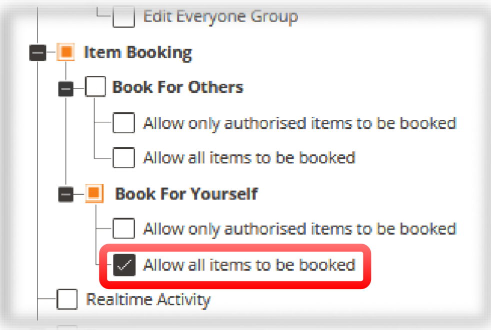


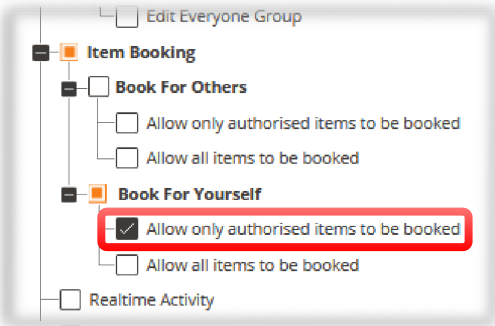
The check box for **Allow all items to be booked** will allow users to take booked items even if they have not been granted access to them.

The check box for **Allow only authorised items to be booked** will allow users who have been granted access to those items to be able to take them during a booking.

If both check boxes are selected, then the option 'Allow all items to be booked' will apply. If both boxes are left unchecked, then you will be unable to book items for others.

Book For Yourself





The check box for **Allow all items to be booked** will allow users to take booked items even if they have not been granted access to them.

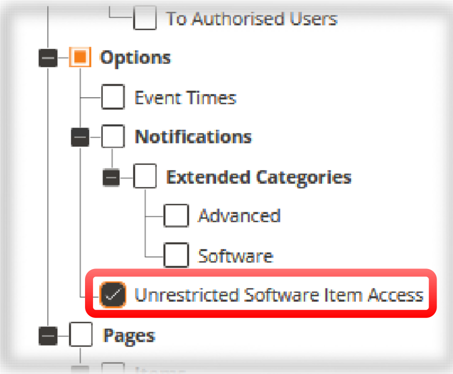
The check box for **Allow only authorised items to be booked** will allow users who have been granted access to those items to be able to take them during a booking.

If both check boxes are selected, then the option 'Allow all items to be booked' will apply. If both boxes are left unchecked, then you will be unable to book items for yourself.

Restricted & Unrestricted Item Access

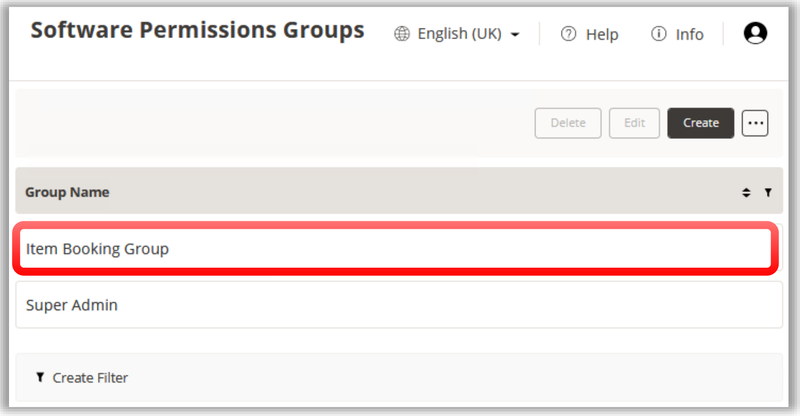
If unrestricted Item Access is unticked, the user will only be able to grant to other users' items that the booking user also has access to.

This may be overridden by ticking the Unrestricted Software Item Access box in Software Permissions Groups.



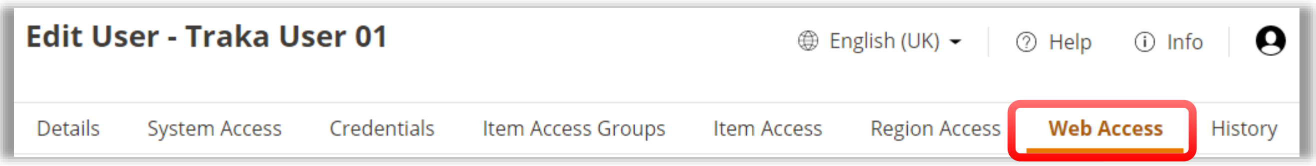
5. Once you have finished making your selection, click **Save and Return**.

The newly created Permissions group will be shown.

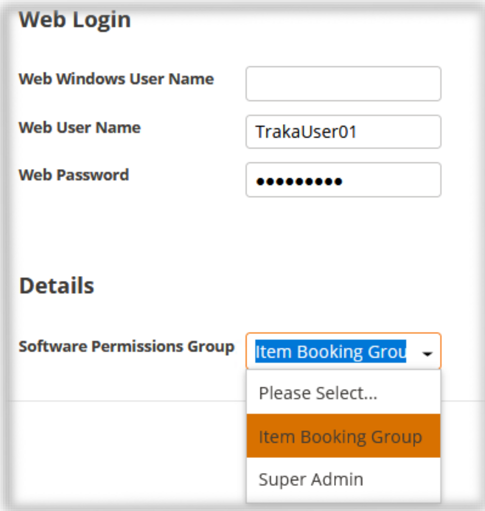


You will now be able to allocate the Permissions Group to specific users.

6. Navigate to the **Users** page, choose a User whom you are going to assign to the newly created Software Permissions Group, click on **Edit**, and once you have accessed their personal record click on the **Web Access** tab.



7. At the next page, create the Web Login details for the user and select the Software Permissions Group from the drop-down menu.



When the user logs into TrakaWEB, they will then be able to create and amend their own Item Booking but will not have access or the ability to edit any other features.

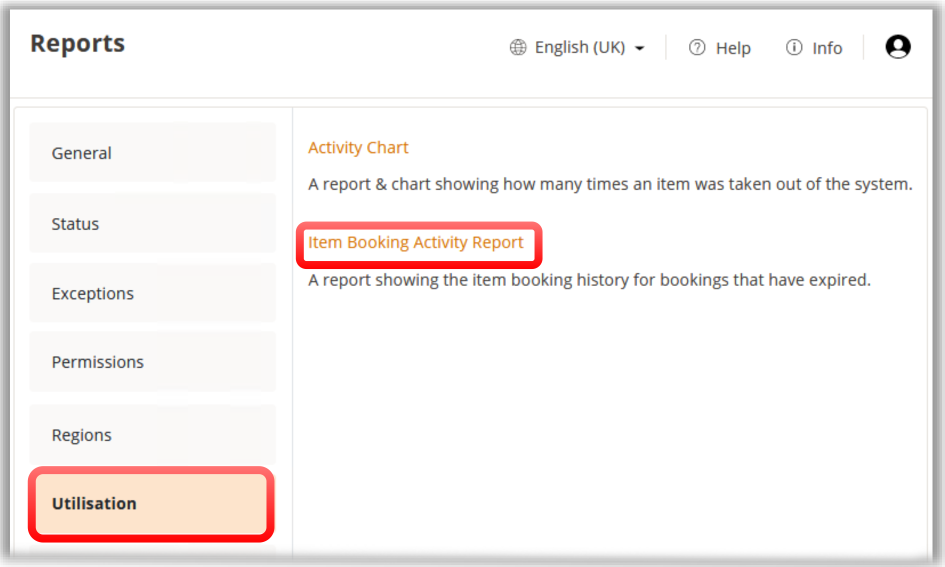
NOTE: If you wish to delete a Software Permissions Group, then you will need to deallocate it from any users first.

6.7.18 ITEM BOOKING REPORTS

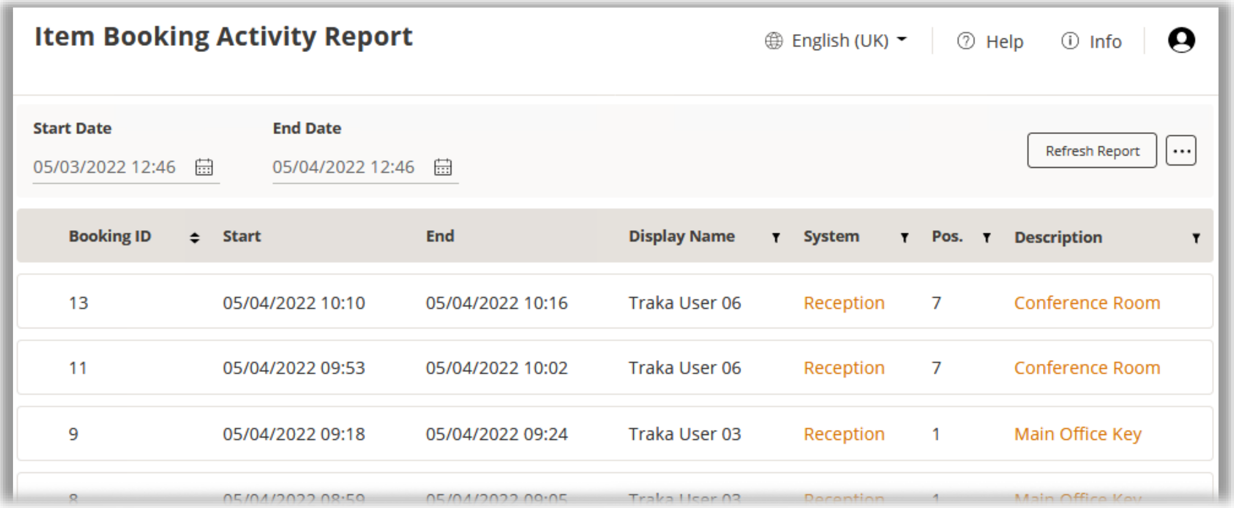
Whilst the Booking Summary page will show all active and future bookings, a separate audit trail will be made available in the reports section of TrakaWEB. There are two types of Booking report available: Item Booking Activity Report and Item Booking Exception Report.

6.7.18.1 ITEM BOOKING ACTIVITY REPORT

1. Click on **Reports** in the Navigation Menu and choose the **View Reports** option. Then locate the **Item Booking Activity Report** under the **Utilisation** sub-menu.

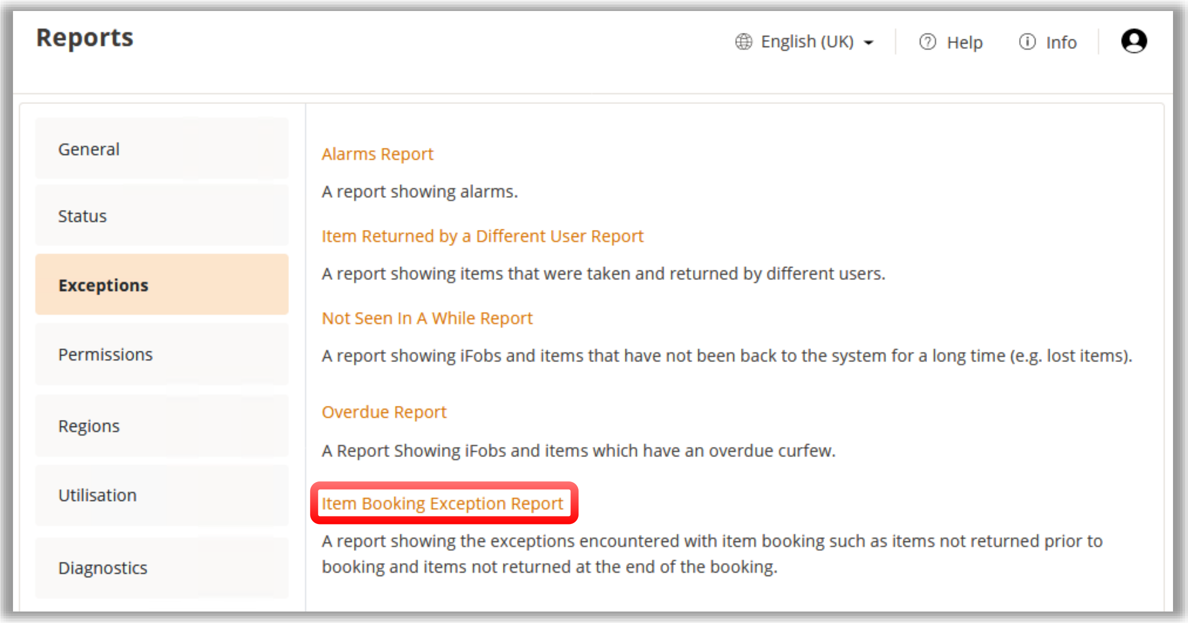


2. Click on the report's name to view it. You will now be taken to the 'Item Booking Activity Report'.

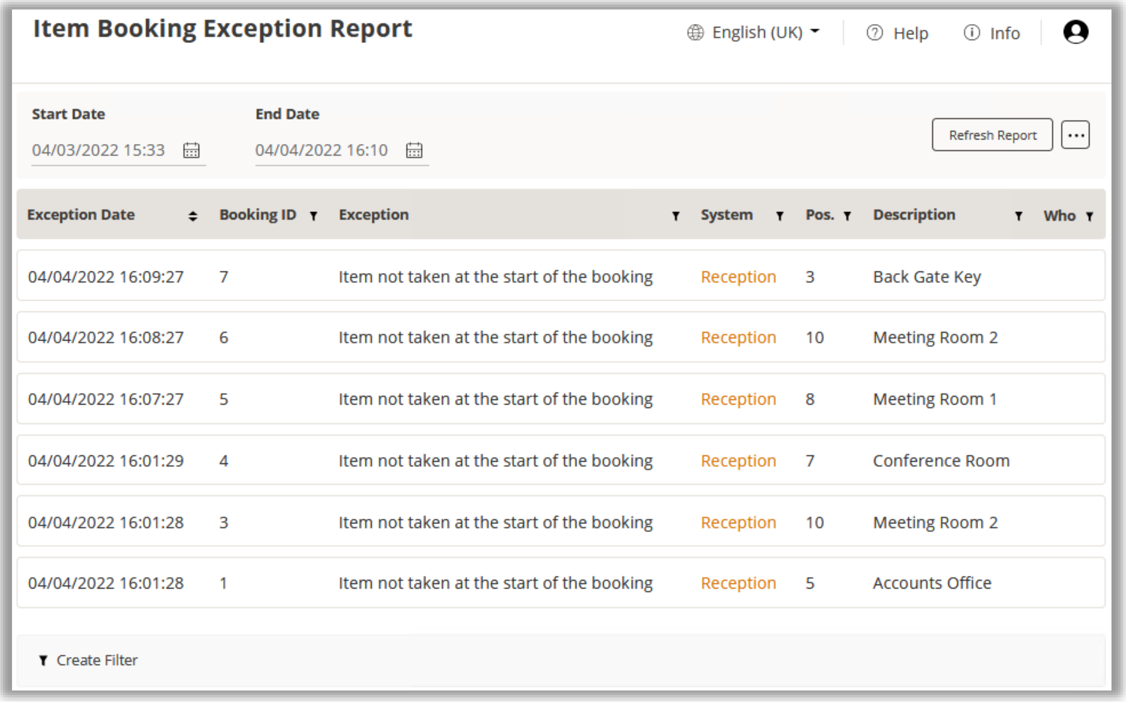


6.7.18.2 ITEM BOOKING EXCEPTION REPORT

1. Click on **Reports** in the Navigation Menu and choose the **View Reports** option. Locate the **Item Booking Exception Report** under the **Exceptions** sub-menu.



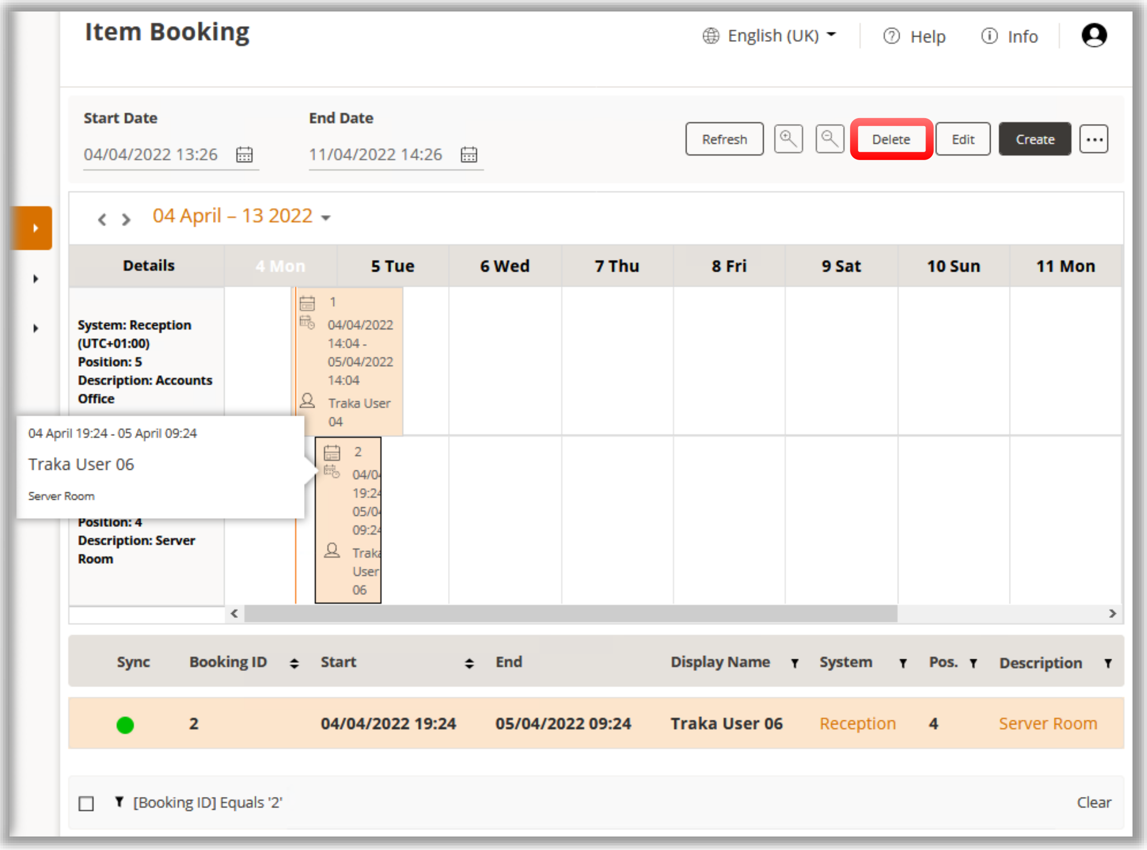
2. Click on the report's name and you will be taken to the 'Item Booking Exception Report'.



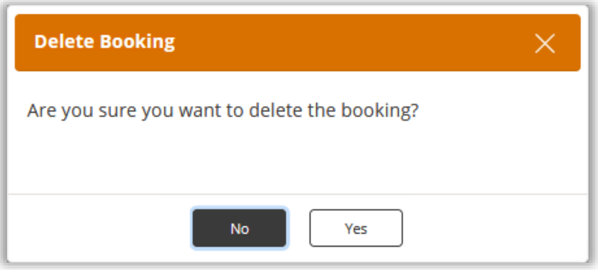
6.7.19 DELETE ITEM BOOKING

1. Select **Item Booking** from the **Items** section in the Navigation Menu.

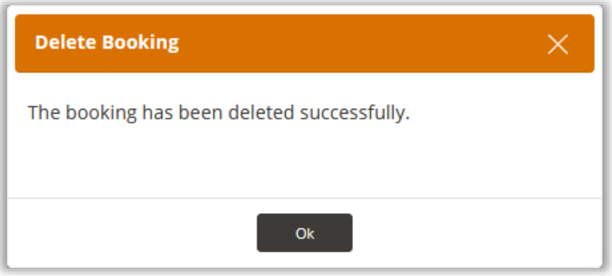
2. At the Item Booking landing page, select the booking you wish to delete, and then click the **Delete** button.



3. A window will show where you will be asked if you are sure to delete the booking. Select **Yes.**



4. TrakaWEB will then display a confirmation message. Click on **OK** to come back to the Item Booking menu.



6.8 FUEL, DISTANCE & LOCATION LOGGING

Fuel, Distance & Location Logging are individual cost options which can be used to assist fleet managers with day-to-day management of their vehicles. Each feature can be used independently or in combination. They can be purchased individually and also be turned on or off as required.

Users with access to the system will be granted a key to a vehicle, then after returning the key to the system, they will be requested to enter information regarding the fuel usage, the distance travelled, or time duration of journey, and the vehicle's current location. The next user to remove that key will be shown information as to the current location of the vehicle.

6.8.1 FUEL, DISTANCE & LOCATION LOGGING OVERVIEW

Fuel Level logging allows the end user to record a fuel level against an item when it is returned. This could be the fuel level of a vehicle or the battery charge level of a device.

Distance logging allows the end user to record a cumulative distance value against an item when it is returned. The distance units will be configurable by item type and will include miles, kilometres, and hours.

Location logging allows the end user to record the current location of a vehicle.

When a user returns an item, Traka Touch will prompt the user to enter current information via the on-screen alphanumeric keyboard.

The current fuel, distance and location will be shown in the System Viewer of TrakaWEB and the search screen of Traka Touch.

A current report will be available in TrakaWEB listing for all the items with the feature enabled.

An exception report will be available to list users who have returned items but not provided the requested information at the Traka Touch System.

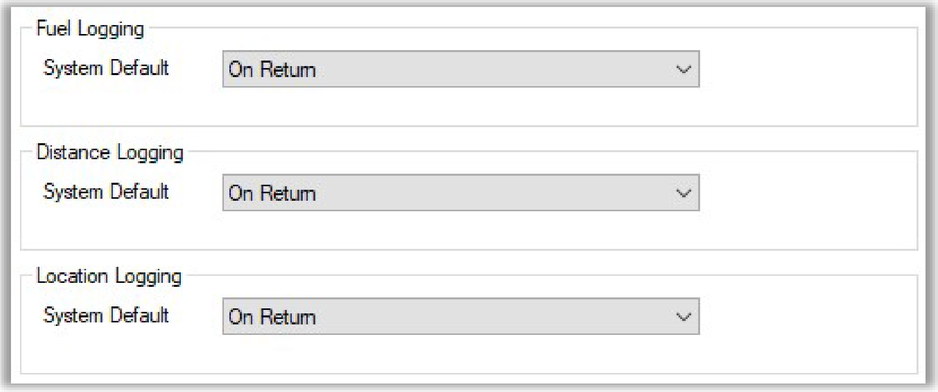
NOTE: Location Logging is also available for Random Return to Multiple Systems (RRMS). For more information, please refer to the Random Return to Multiple Systems section of this document.

6.8.1.1 ENABLING THE OPTION

The Fuel, Distance & Location Logging features require a system configuration before they can be enabled. Contact Traka or your Distributor for further details.

The features can be enabled through two different methods before they are usable in TrakaWEB.

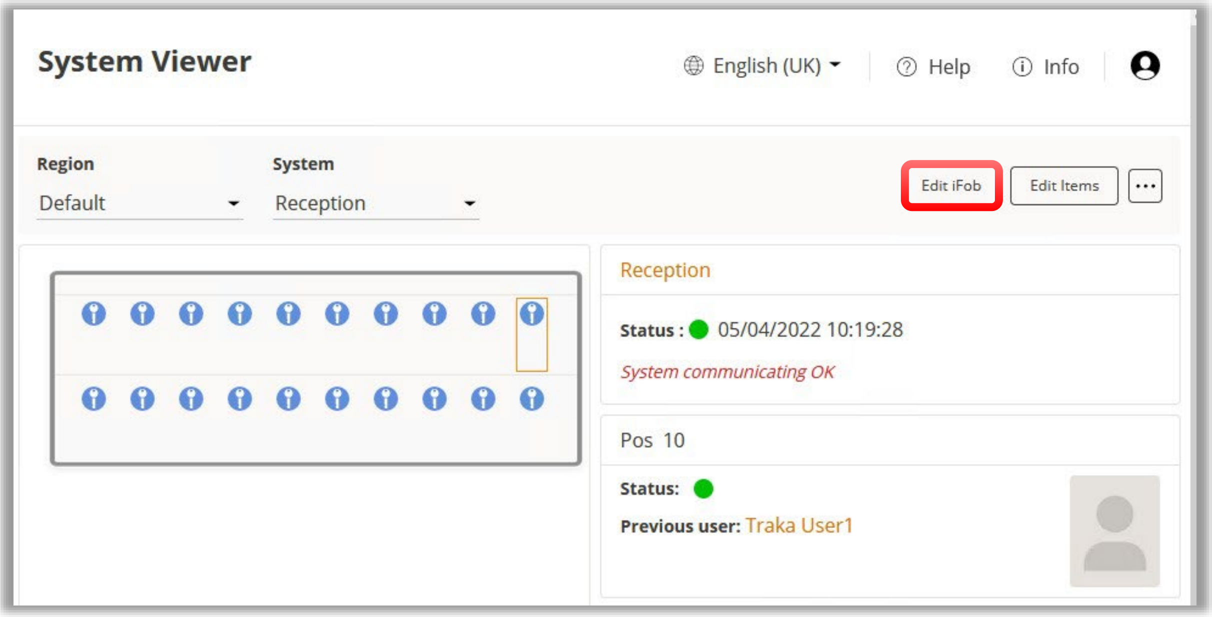
1. To enable the options within the Admin Application, a user will need to set them to **On Return**. An administrator who has the appropriate access to the Admin Application will need to select the desired system and navigate to the Feature Options tab. Once selection has been completed, Click **Save**.



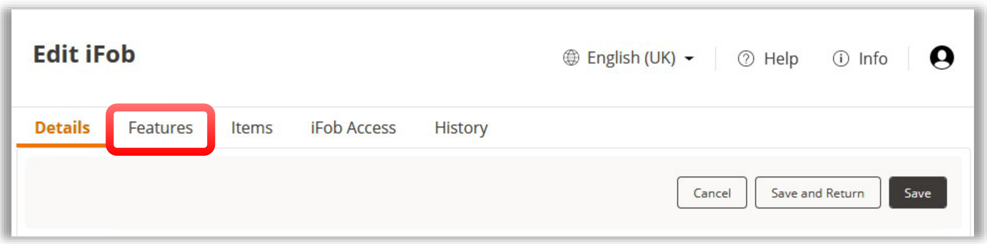
NOTE: Enabling the features in TrakaWEB Admin will set all items in the system to have the feature active.

Alternatively, each feature can be activated within TrakaWEB through the **Features** tab.

2. From the System Viewer, select an item to apply the feature to and then select **Edit iFob** from the Toolbar.

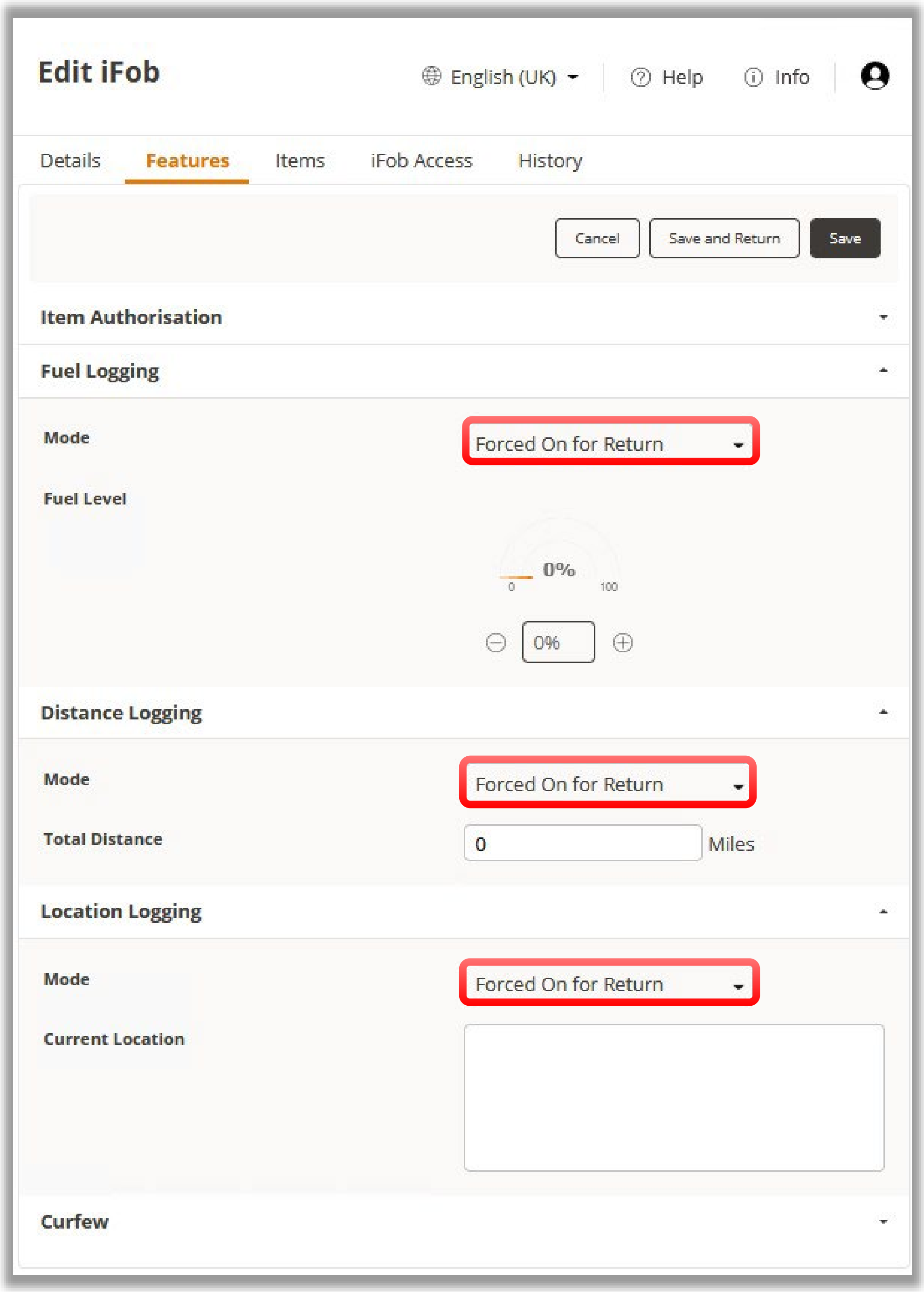


3. At the next window, select the **Features** tab.



Within the Features tab you will see a list of all the Feature Options that are available.

4. Selecting the **Fuel Logging**, **Distance Logging** and **Location Logging** tabs will enable you to change the 3 features to **Forced On for Return**. Once the required features have been selected, click **Save and Return**.



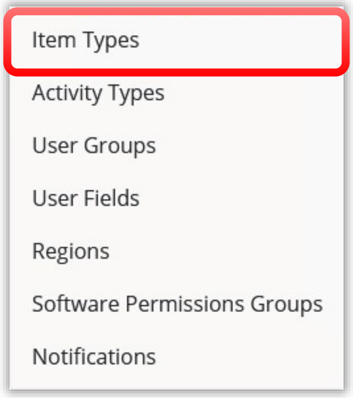
NOTE: If you choose to enable the features through TrakaWEB, they will only be available on the current selected item. Depending on how many items you wish to have the particular features enabled upon, it may be more time efficient to enable them in TrakaWEB Admin and then disable them on any items you don't want them enabled upon in TrakaWEB. If, however you have many items and only wish the features to be enabled on a few, it will be more time efficient to enable them on those items in TrakaWEB.

NOTE: If you are using Location Logging with RRMS, the option will automatically be enabled for all systems. Please refer to the Random Return to Multiple Systems section for more information.

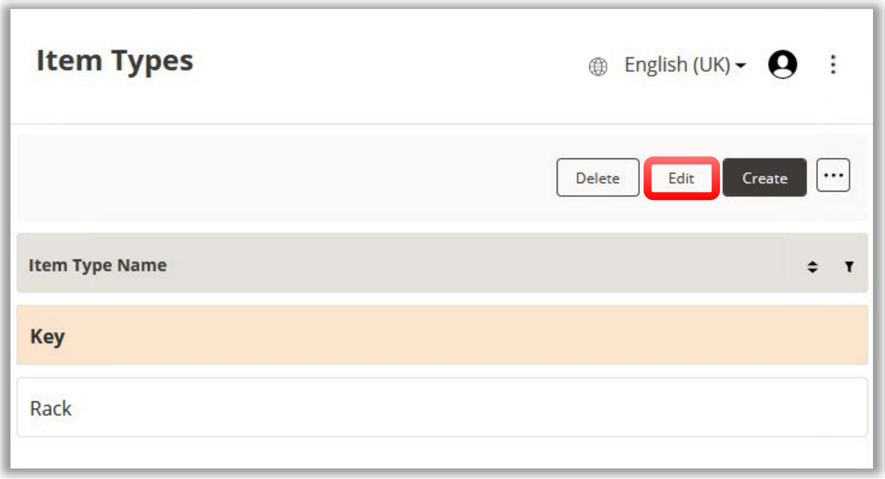
6.8.1.2 CONFIGURING DISTANCE LOGGING

Fuel Logging and Location Logging do not require any further configuration once they are made active. A user with administration access can however select different options, which will affect the Distance Logging functionality.

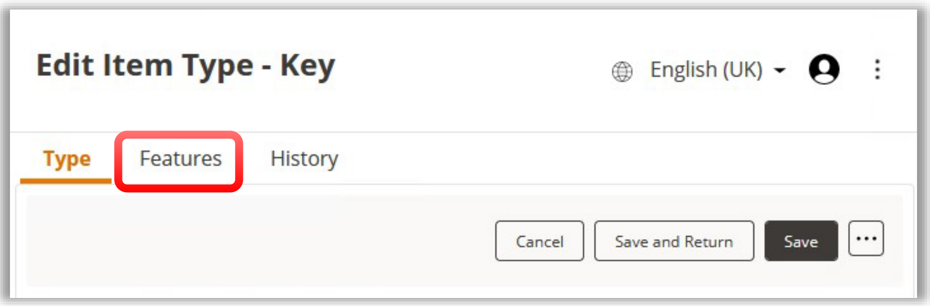
1. Within Software Settings on the Navigation Menu, click on **Item Types**.



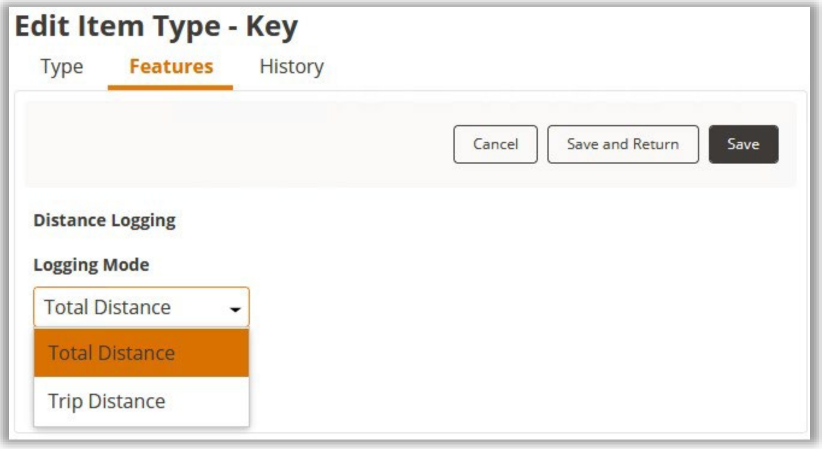
2. The user will now be taken to the Item Types page. After the required item has been selected, click on **Edit**.



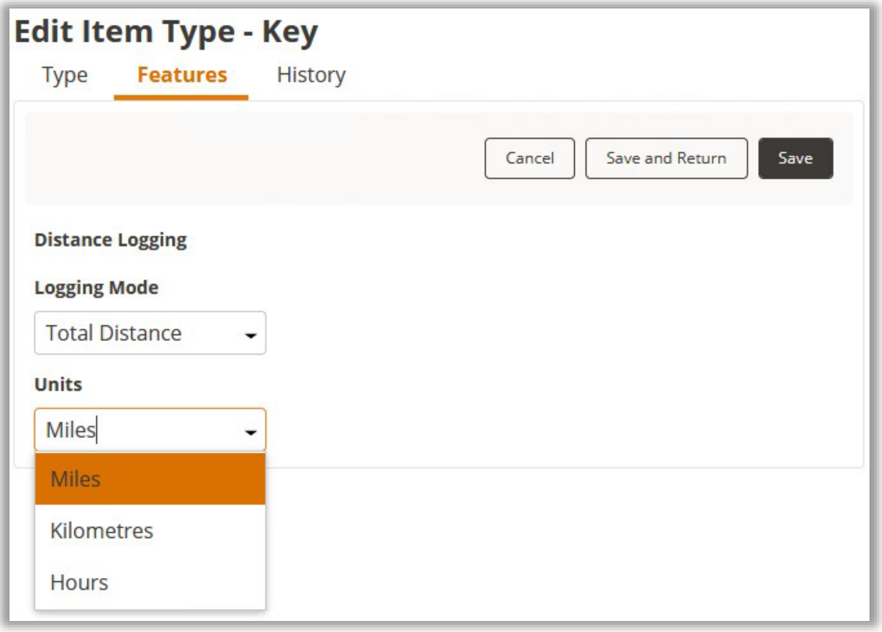
3. At the **Edit Item Type** page, click on the **Features** tab as shown.



4. Clicking on the **Logging Mode** drop-down menu will provide two options: **Total Distance** and **Trip Distance**.



5. Clicking on the 'Units' drop-down menu will provide three options: 'Miles', 'Kilometres' and 'Hours'.

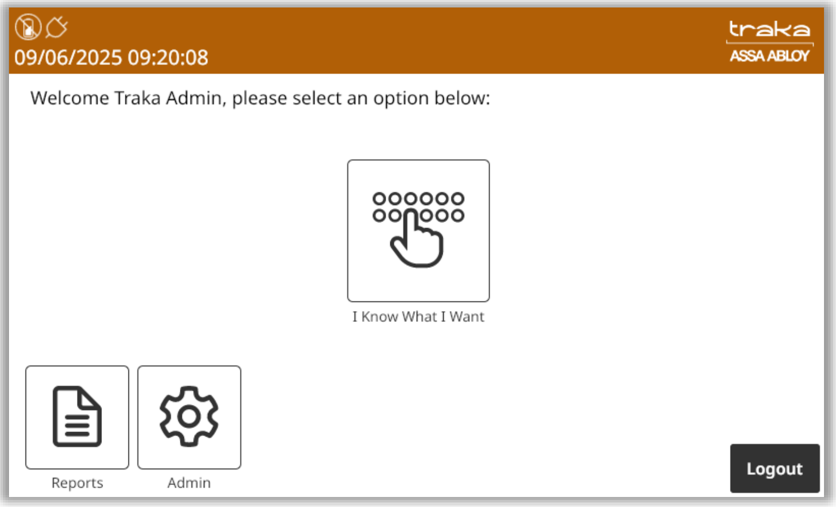


6. Once a selection has been made, click on **Save and Return**.

NOTE: If a user changes the units at any time, the previous numeric value in the system will remain the same but will display the current set unit. For example, 8 hours will become 8 miles if the unit was changed from hours to miles.

6.8.1.3 REMOVING AN ITEM

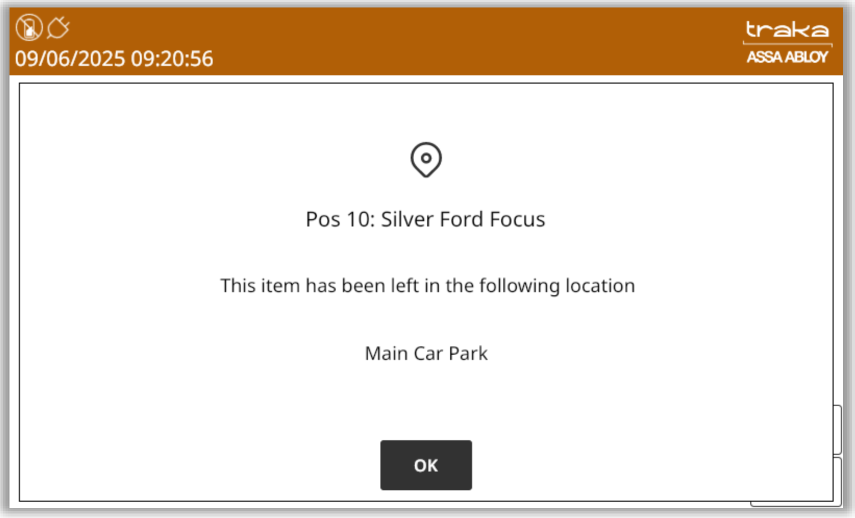
1. Access the system using a keypad ID, Credential, or Fingerprint.



NOTE: When an admin user accesses the system, they will see the I Know What I Want button. When a non-admin user accesses the system, the door will automatically open.

Once the door has opened, a user will be able to select an item. A screen will then be shown displaying the details of the item's last known location.

2. Click on **OK** and the item will be released.

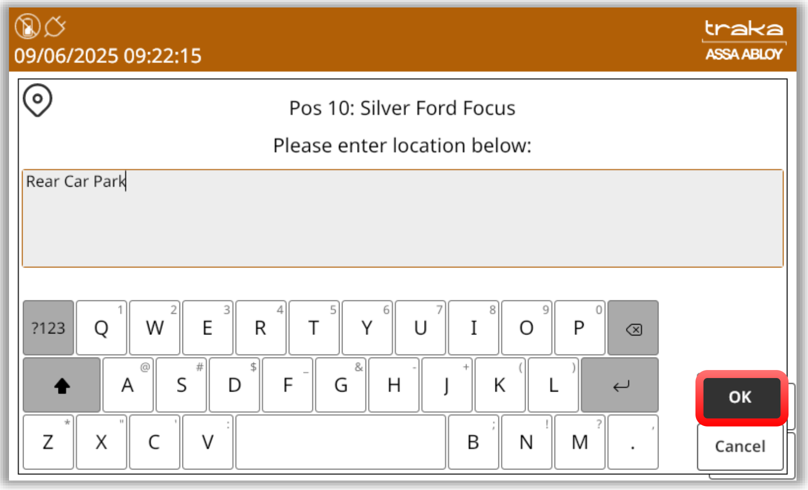


6.8.1.4 RETURNING AN ITEM

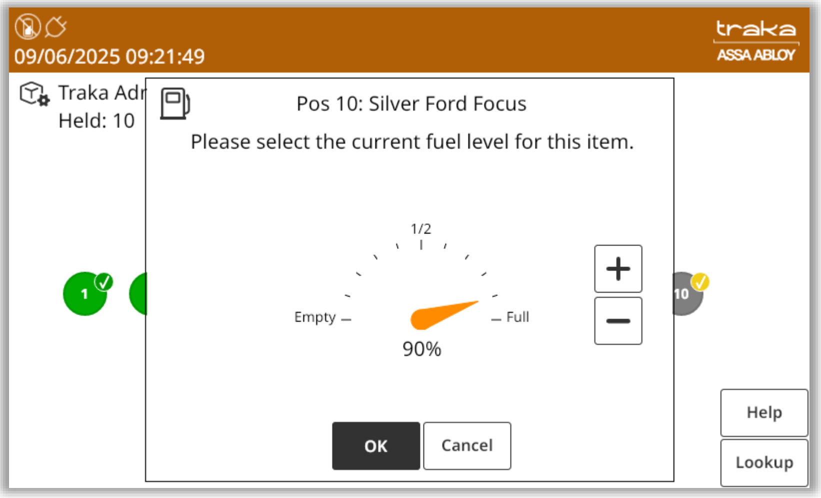
When users return items to the system, they will be prompted to enter specific details including its location, fuel or charge status and distance or time duration of travel.

NOTE: Closing the door will prevent a user from entering the requested information. This will generate an 'Exceptions' report in TrakaWEB.

1. If the Location feature has been enabled, after logging into the system and returning the item, the user will be presented with the following screen requesting the items' current location. Once the location has been entered, click **OK**.



2. If the Fuel feature has been enabled, then at the next screen the user will be required to enter the current fuel/charge level. This is shown as a dial on the screen which can be simply rotated clockwise or anticlockwise using a finger or by using the up and down arrows.



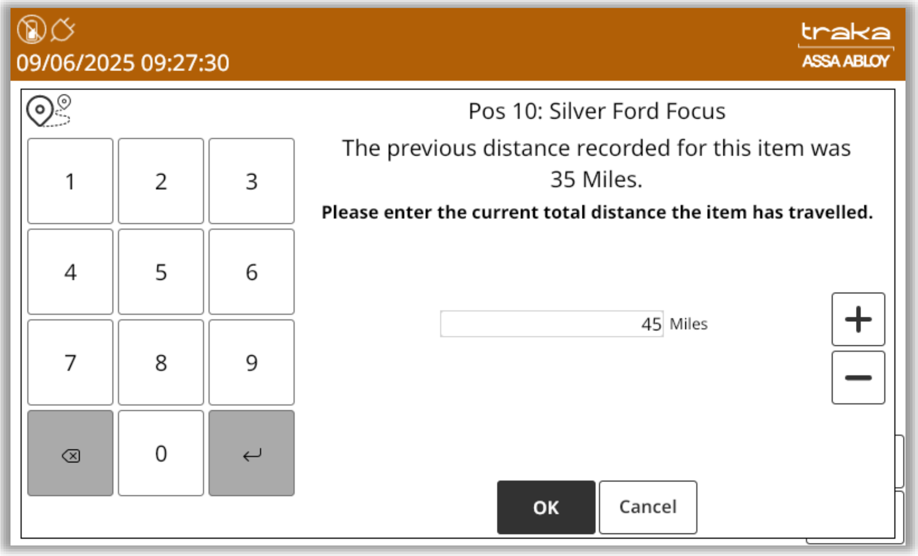
NOTE: For locker-based systems, this screen will be used to log the current charge remaining in an item such as a laptop or an iPad.

3. Once the fuel/charge level has been set, click **OK** to continue.

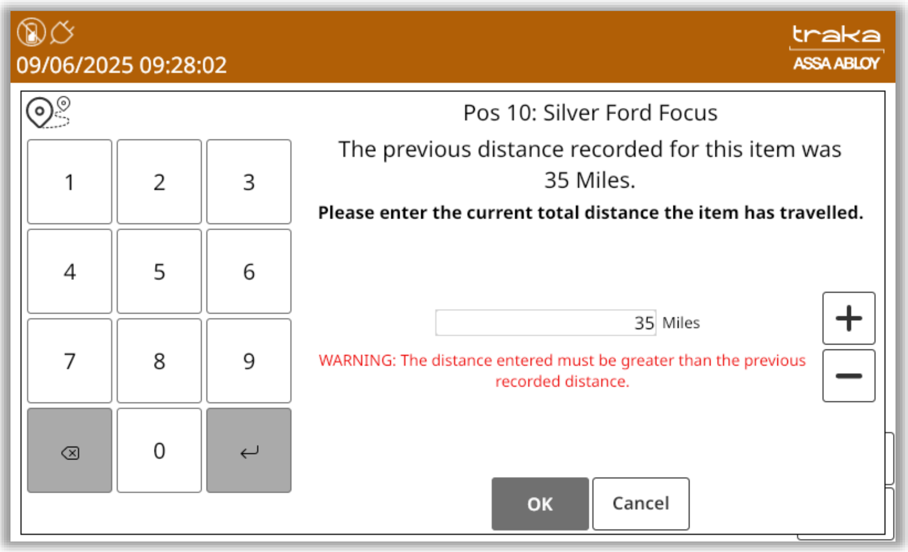
If the Distance feature has been enabled, the next screen will request a user to enter either the 'Trip Distance' or the 'Total Distance'.

If the logging mode selected was for 'Trip Distance', the user will be required to enter the distance travelled on that trip.

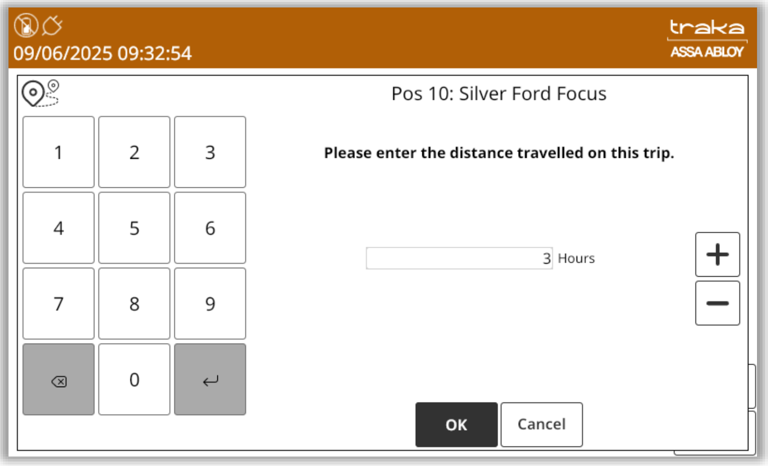
If the logging mode selected was for 'Total Distance', the user will enter the total current distance travelled against the previous distance.



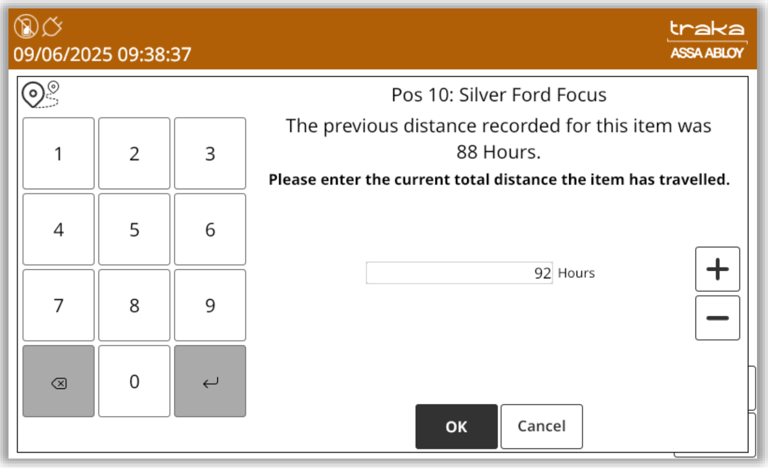
NOTE: If the user enters a current total distance that is less than or equal to the previous distance, the system will display a warning. The distance will automatically be set to the same value as the previous logged distance unless a correct value is entered.



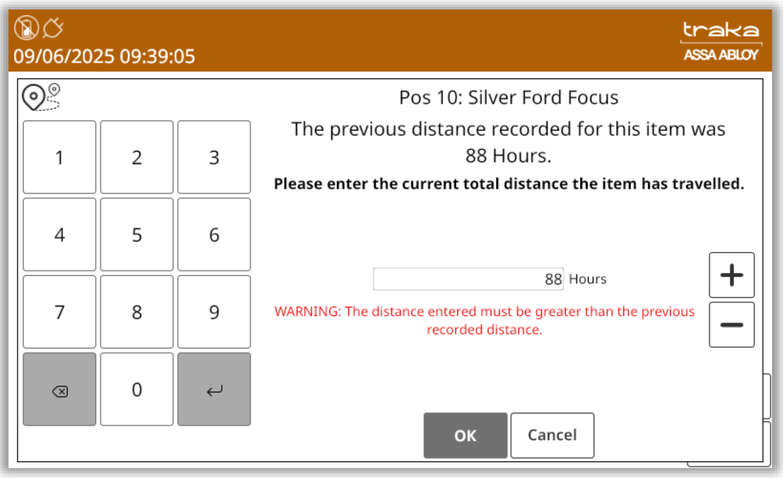
If the units were set to hours, and the logging mode was set to 'Trip Distance' the user will enter the distance travelled in hours.



If the units were set to hours and the logging mode was set to 'Total Distance', the user will enter the total distance travelled in hours against the previous time duration.



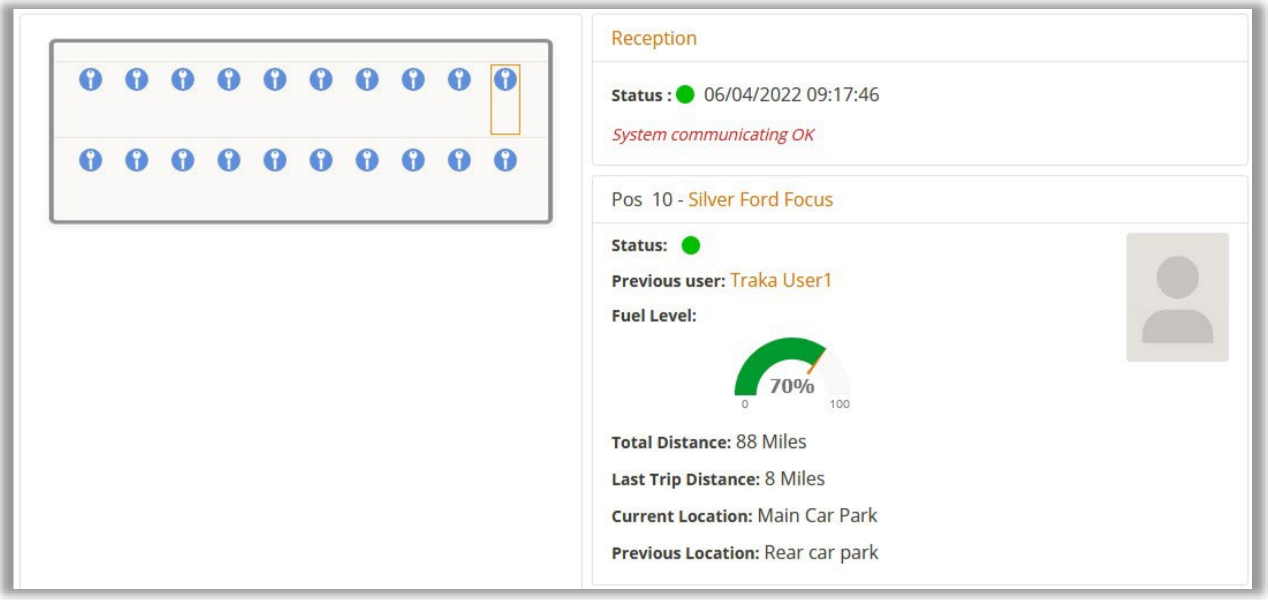
NOTE: If the user enters a current total time duration that is less than the previous time duration, the system will display a warning. The hours will automatically be set to the same value as the previous hours unless the correct value is entered.



6.8.1.5 VIEWING CURRENT FUEL, DISTANCE & LOCATION LOGGING

The System Viewer screen will display the basic details of the current selected item in the system.

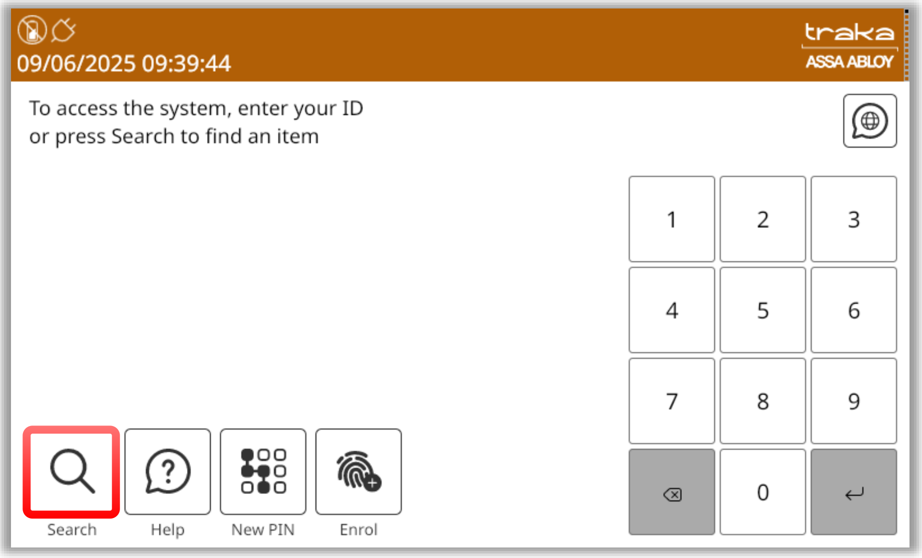
Depending on what features have been enabled, a user can see the current fuel level, the total distance and last trip distance, depending on which features were enabled. The user can also see both the current and previous location of the item as well as the previous user who took the item.



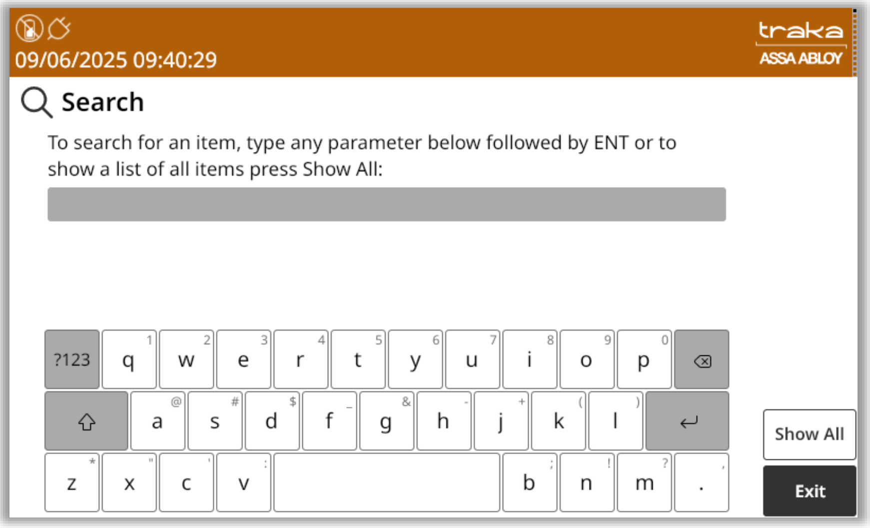
Users can also view the current Fuel, Distance and Location through the search screen on Traka Touch.

NOTE: Depending on how the Traka Touch system has been configured, the Search option maybe located under 'Reports'. See UD0011 – Traka Touch User Guide for further details.

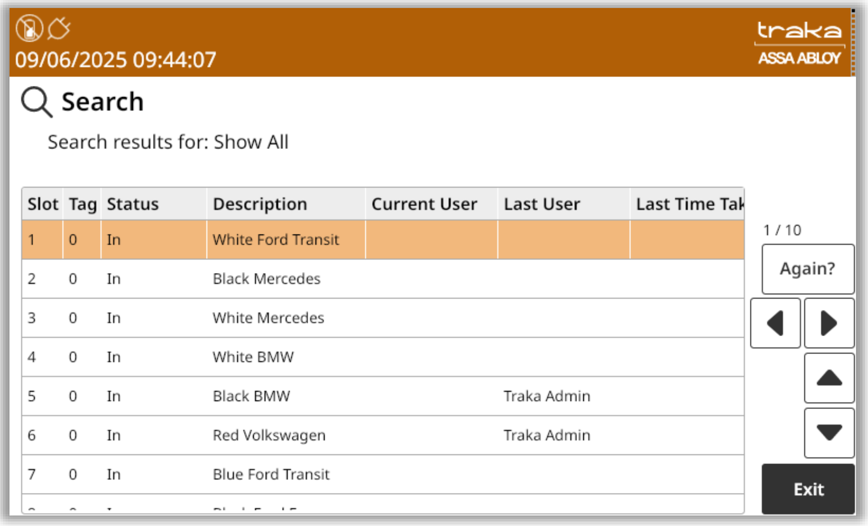
1. Click the 'Search' button on the Traka Touch screen.



A user can now use the alphanumeric keypad to input the name of a specific item followed by the **Enter** key  or simply click on Show All.



Depending on what features have been enabled, the next screen will display the search results. Scroll to the right to see the current Fuel, Distance and Location for the particular item/s as shown in the example below.

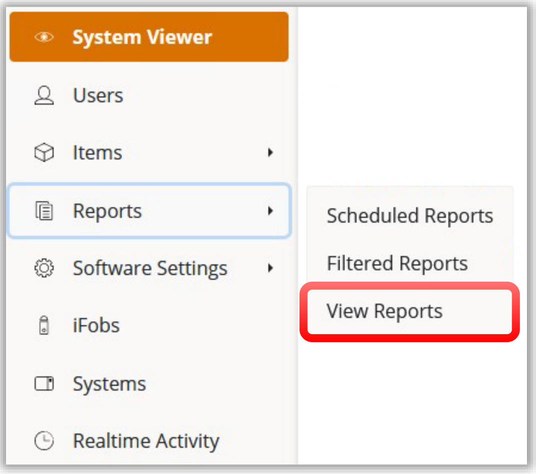


6.8.2 FUEL, DISTANCE & LOCATION REPORTS

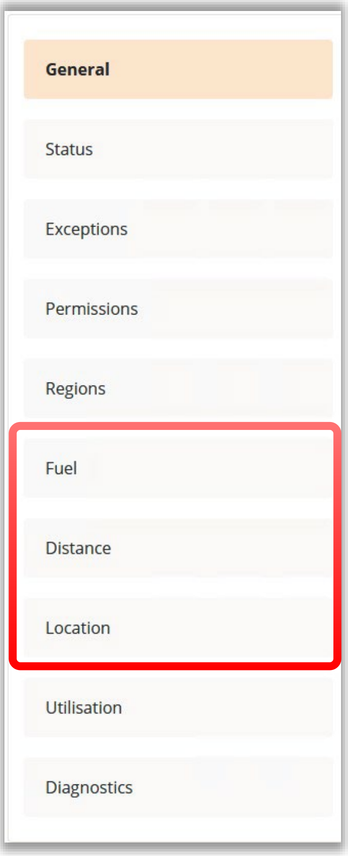
For any Fuel, Distance and Location logging activities, an audit trail will be made available in the reports section of TrakaWEB. Separate reports can be viewed for Fuel, Distance and Location. There also exists an 'Exceptions' report.

Each report can be exported as a PDF or Microsoft Excel file.

1. Click on the **Reports** tab on the Navigation Menu and select **View Reports**.



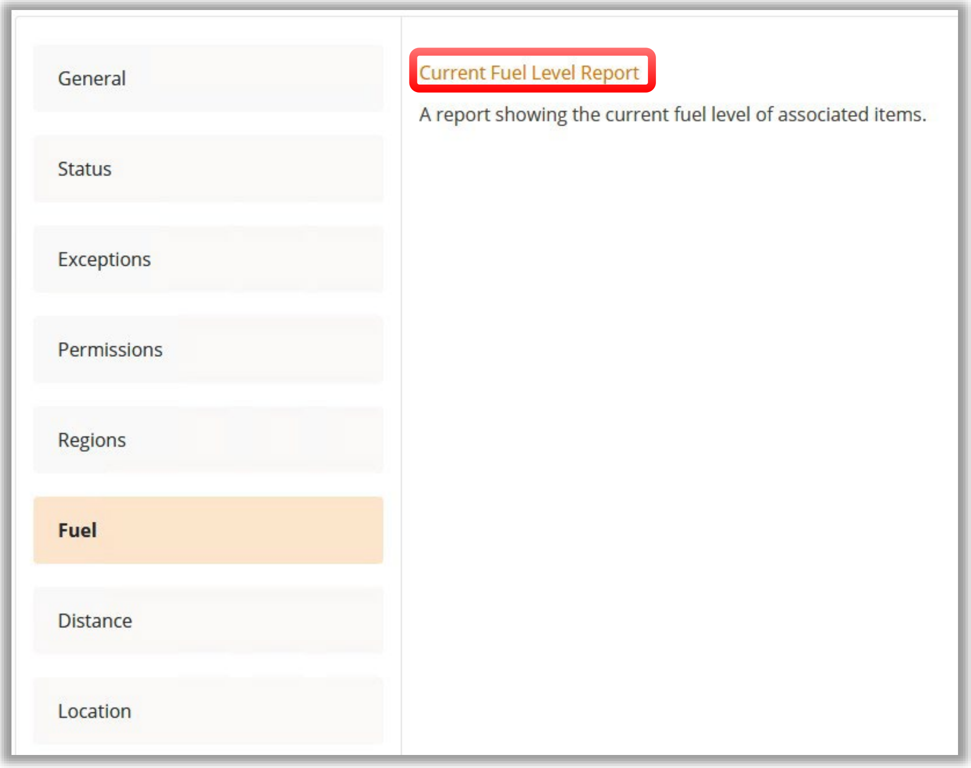
The Reports screen will now be displayed as shown below. Within the list, you can choose to view a report for Fuel, Distance and Location.



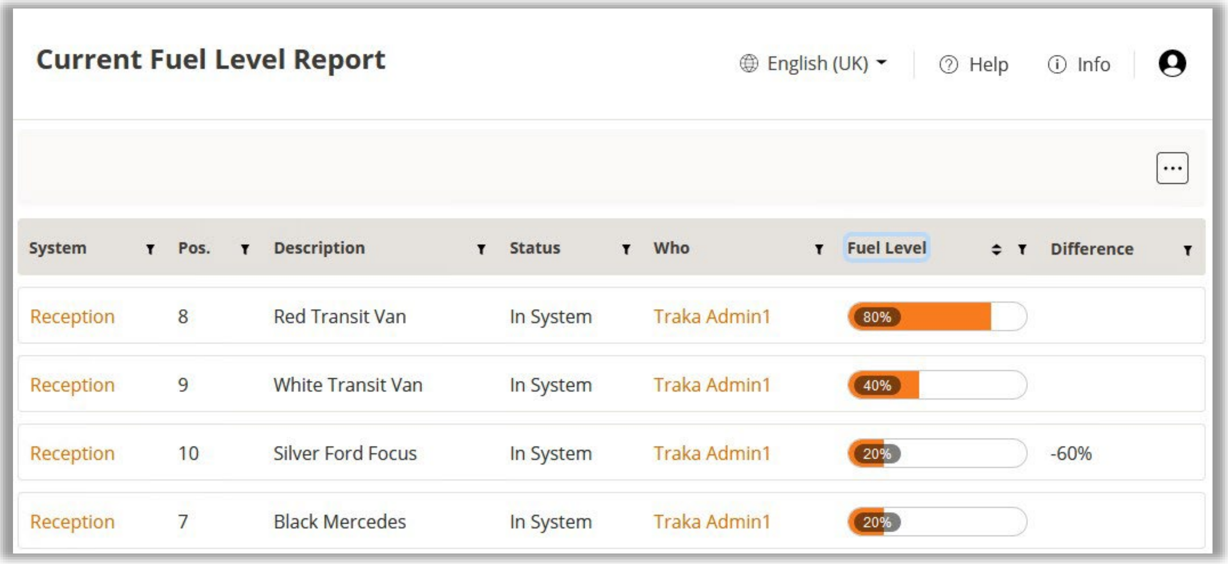
NOTE: Only the features that have been enabled will be displayed in the reports screen.

6.8.2.1 FUEL REPORT

1. To view the Fuel report, click on the Fuel tab and then click on the **Current Fuel Level Report** link.



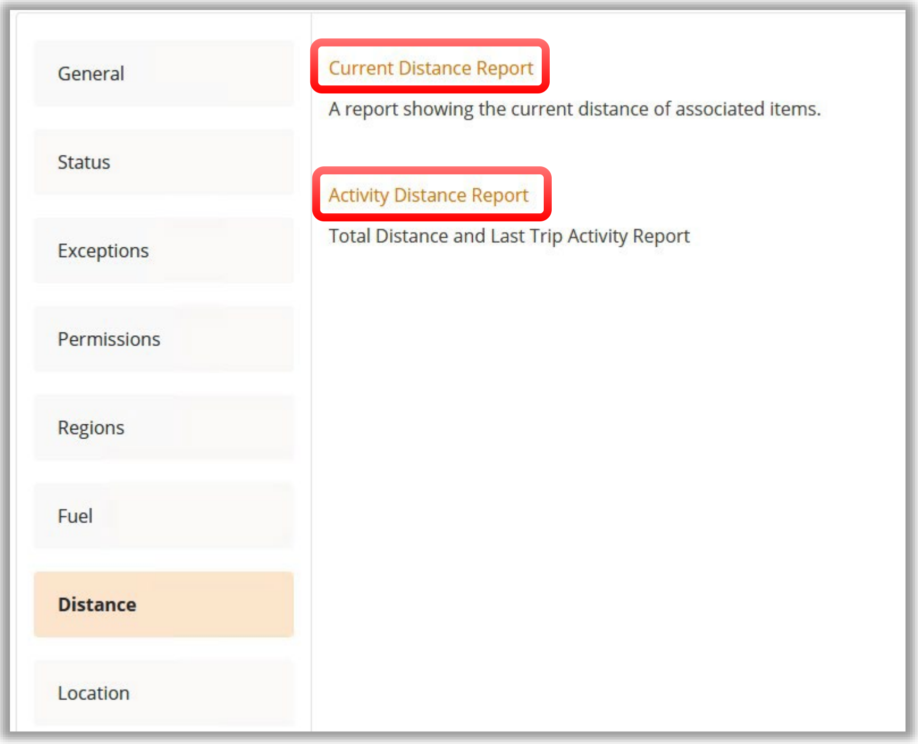
The Current Fuel Level Report will now be displayed as shown below.



6.8.2.2 DISTANCE REPORTS

1. To view the Distance reports, click on the Distance tab.

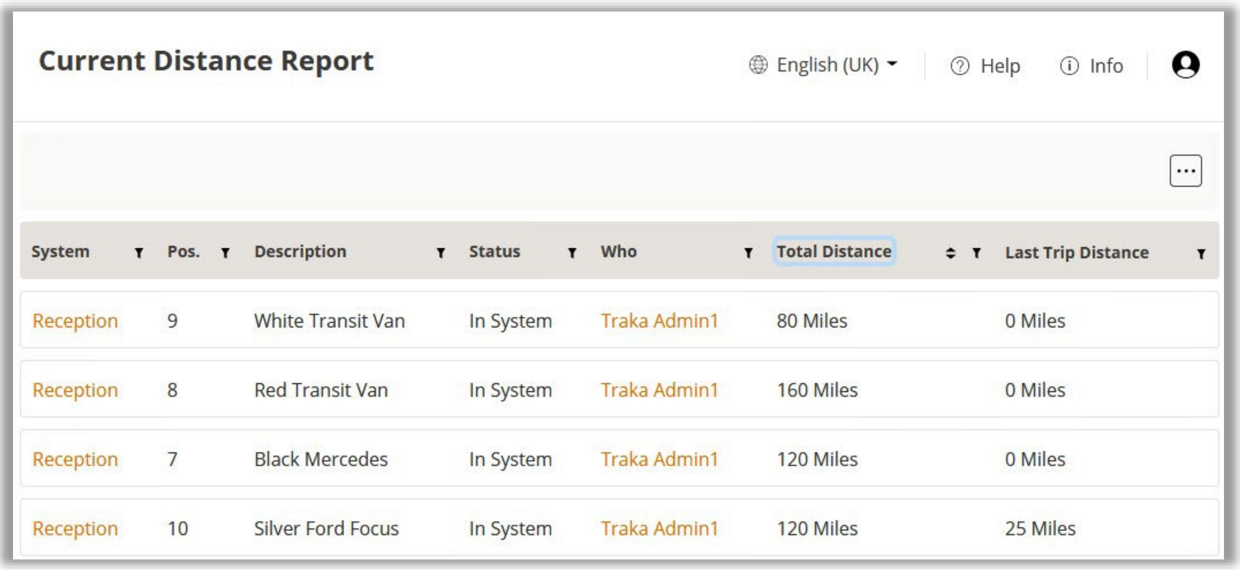
You will notice that there are two reports to choose from: **Current Distance Report** and **Activity Distance Report.**



Current Distance Report

1. To view the **Current Distance Report**, click on the Current Distance Report link.

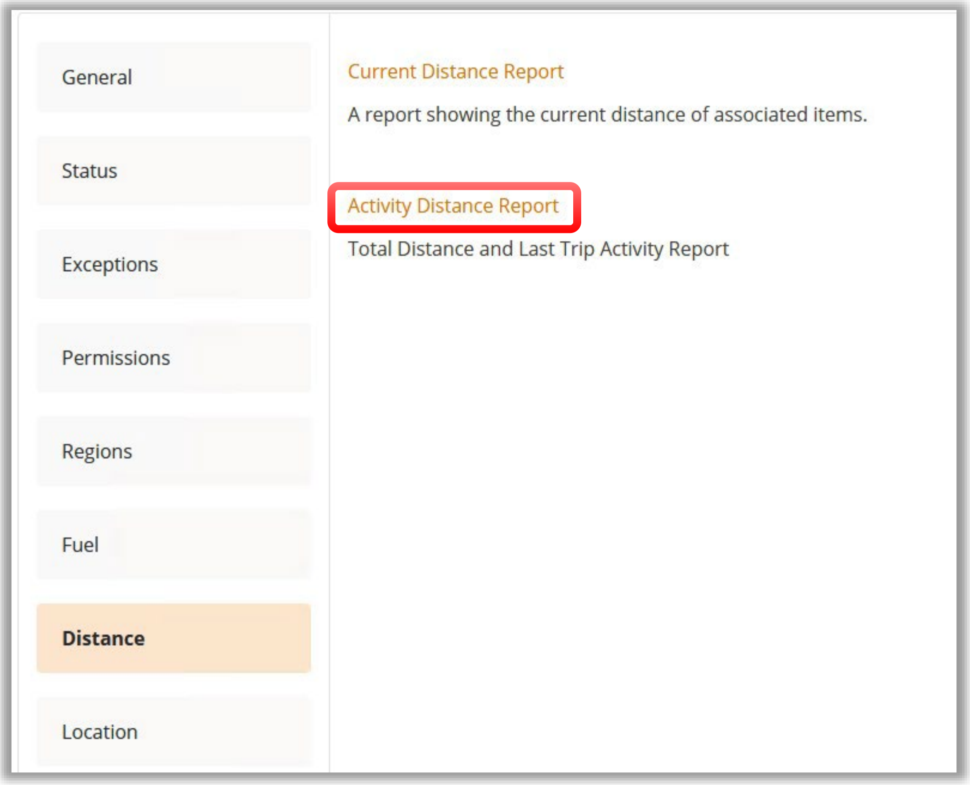
The Current Distance Report will now be displayed as shown below.



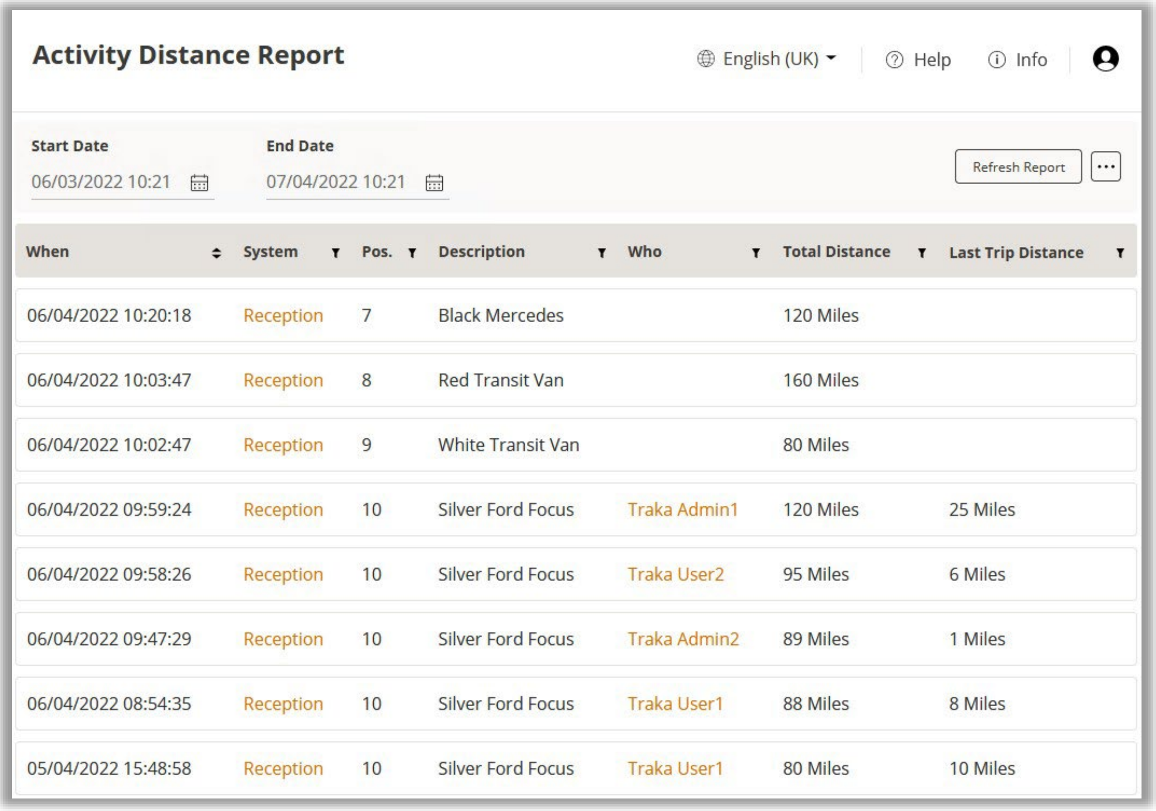
System	Pos.	Description	Status	Who	Total Distance	Last Trip Distance
Reception	9	White Transit Van	In System	Traka Admin1	80 Miles	0 Miles
Reception	8	Red Transit Van	In System	Traka Admin1	160 Miles	0 Miles
Reception	7	Black Mercedes	In System	Traka Admin1	120 Miles	0 Miles
Reception	10	Silver Ford Focus	In System	Traka Admin1	120 Miles	25 Miles

Activity Distance Report

1. To view the **Activity Distance Report**, click on the Activity Distance Report Link.



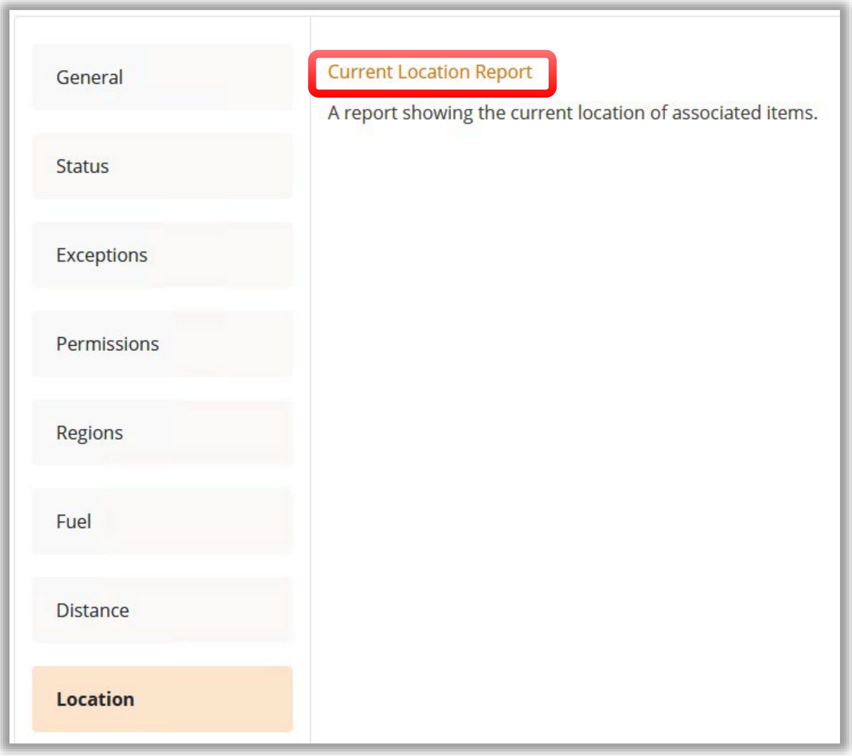
The current Activity Distance Report will now be displayed as shown below.



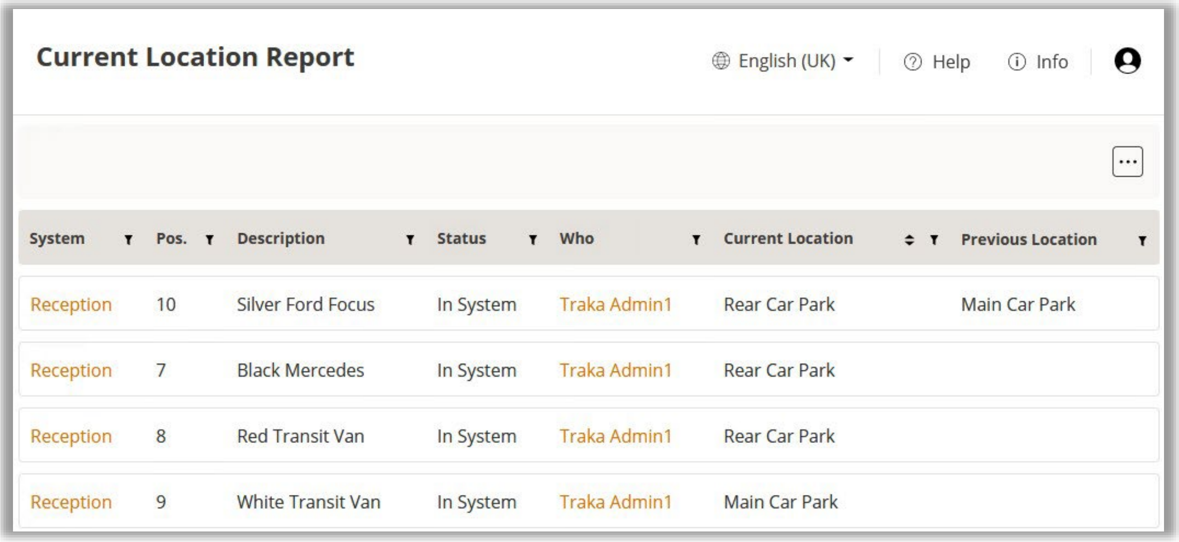
When	System	Pos.	Description	Who	Total Distance	Last Trip Distance
06/04/2022 10:20:18	Reception	7	Black Mercedes		120 Miles	
06/04/2022 10:03:47	Reception	8	Red Transit Van		160 Miles	
06/04/2022 10:02:47	Reception	9	White Transit Van		80 Miles	
06/04/2022 09:59:24	Reception	10	Silver Ford Focus	Traka Admin1	120 Miles	25 Miles
06/04/2022 09:58:26	Reception	10	Silver Ford Focus	Traka User2	95 Miles	6 Miles
06/04/2022 09:47:29	Reception	10	Silver Ford Focus	Traka Admin2	89 Miles	1 Miles
06/04/2022 08:54:35	Reception	10	Silver Ford Focus	Traka User1	88 Miles	8 Miles
05/04/2022 15:48:58	Reception	10	Silver Ford Focus	Traka User1	80 Miles	10 Miles

6.8.2.3 LOCATION REPORT

1. To view the Location report, click on the **Location** tab and then click on the **Current Location Report** link.



The Current Location Report will be displayed as shown below.

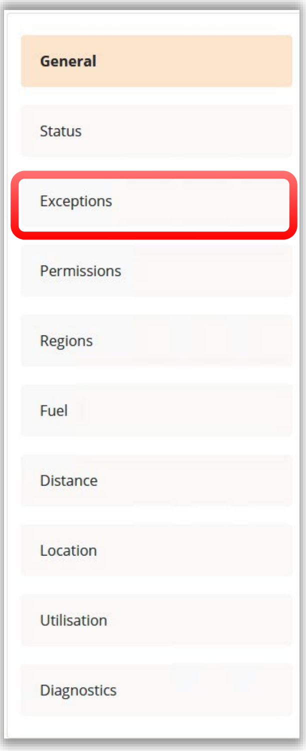


System	Pos.	Description	Status	Who	Current Location	Previous Location
Reception	10	Silver Ford Focus	In System	Traka Admin1	Rear Car Park	Main Car Park
Reception	7	Black Mercedes	In System	Traka Admin1	Rear Car Park	
Reception	8	Red Transit Van	In System	Traka Admin1	Rear Car Park	
Reception	9	White Transit Van	In System	Traka Admin1	Main Car Park	

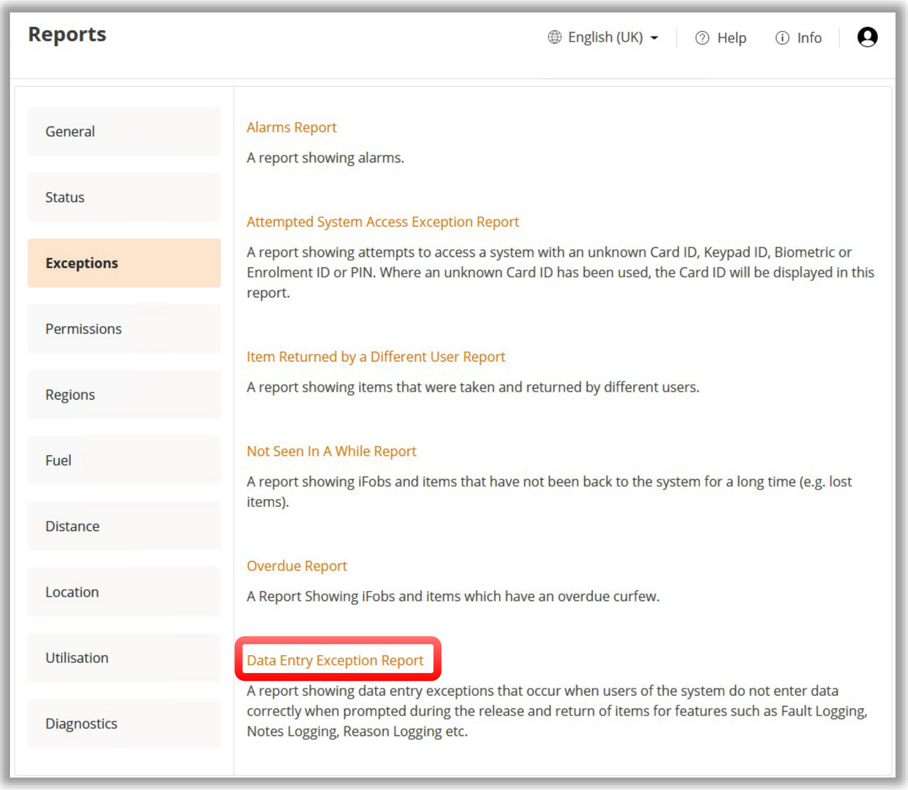
6.8.2.4 EXCEPTIONS REPORT

If a user closes the door upon returning an item and fails to log any details into the system, an 'Exceptions' report will be created. This, like the other reports, can be viewed in TrakaWEB.

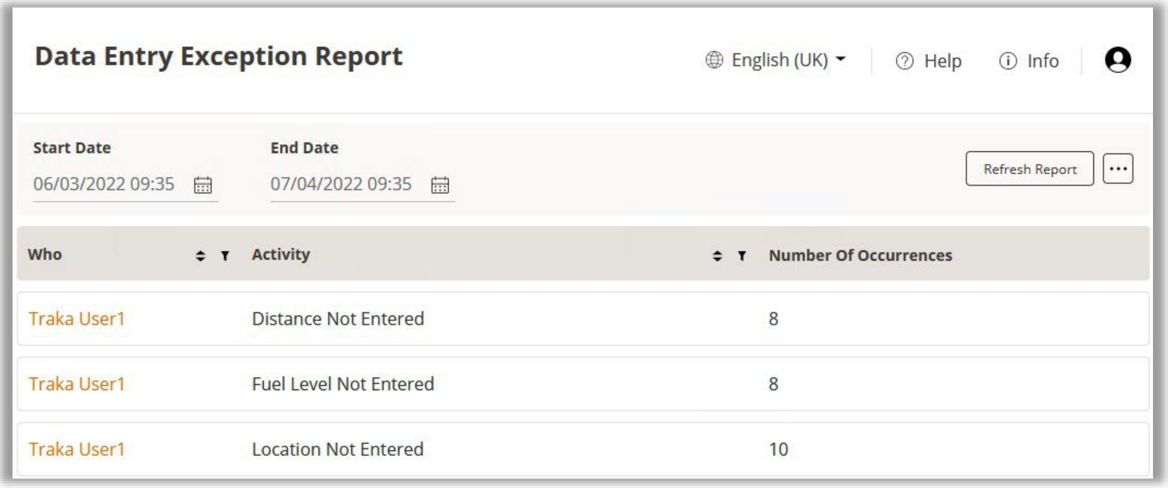
1. To view the Exceptions Report, click on the **Exceptions** tab.



2. Now click on the **Data Entry Exception Report** link.



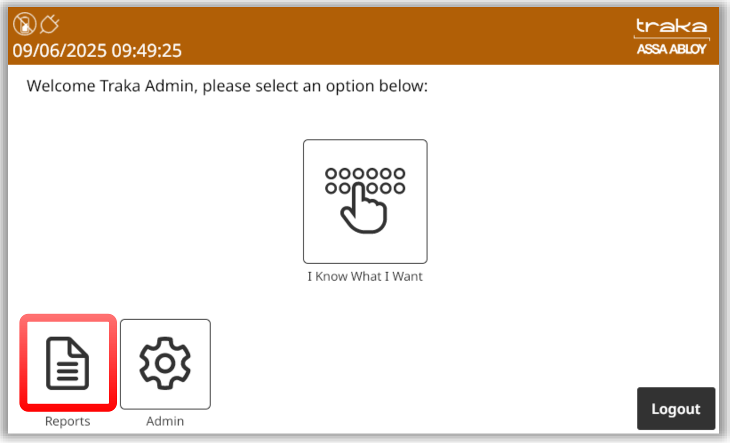
The Exceptions report will now be displayed as shown below.



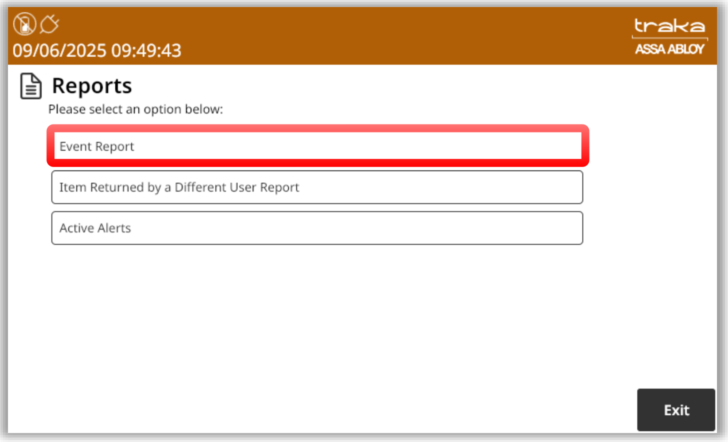
6.8.2.5 TRAKA TOUCH EVENT REPORT

An event report may be generated through Traka Touch

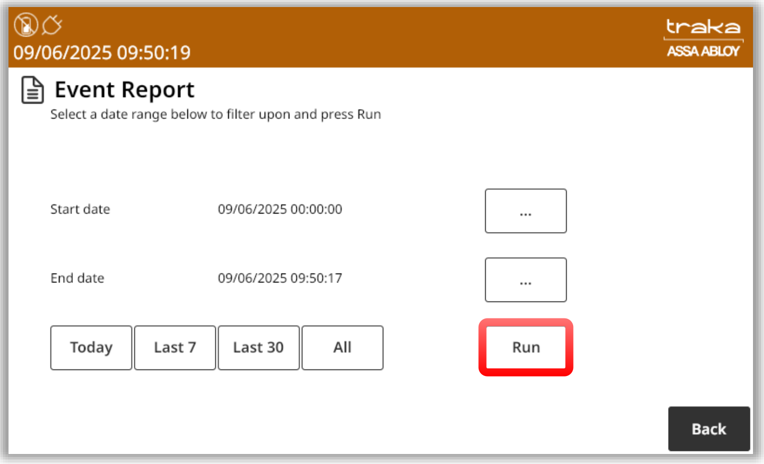
1. Log into the Traka Touch system as an Admin user and select the **Reports** button.



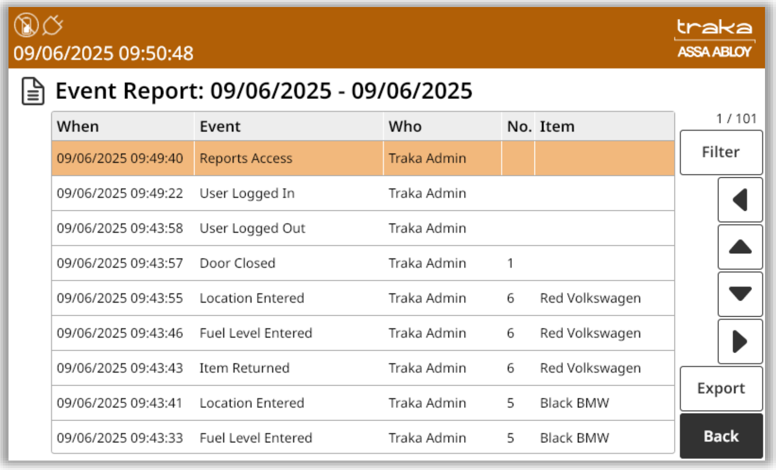
2. From the Reports screen, select **Event Report.**



3. At the next screen, choose a date range for the report and then select **Run.**



An event report will then be generated for the selected date range as shown in the example below. The report can also be exported.

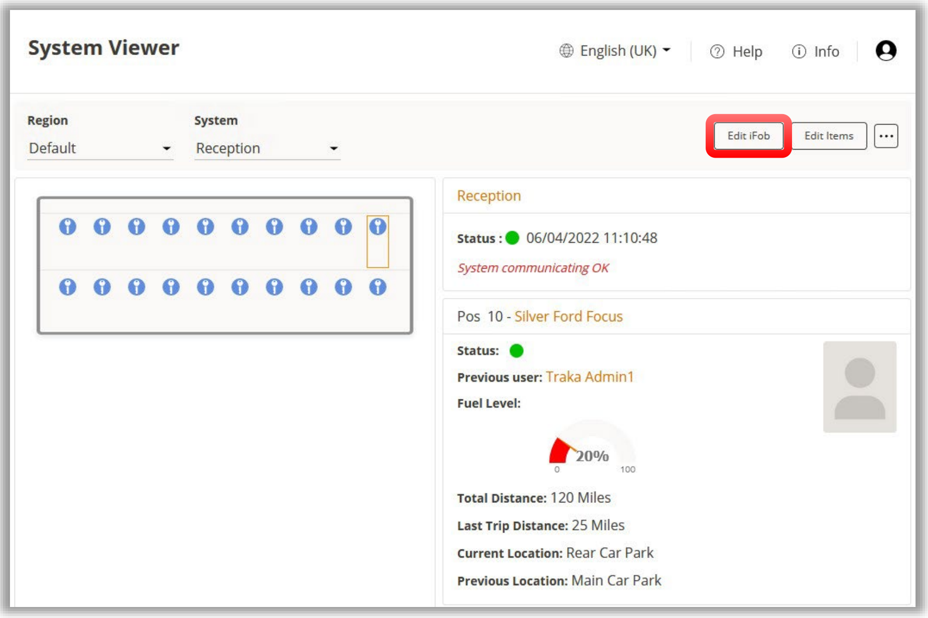


6.8.3 OVERRIDE LOGGING IN TRAKAWEB

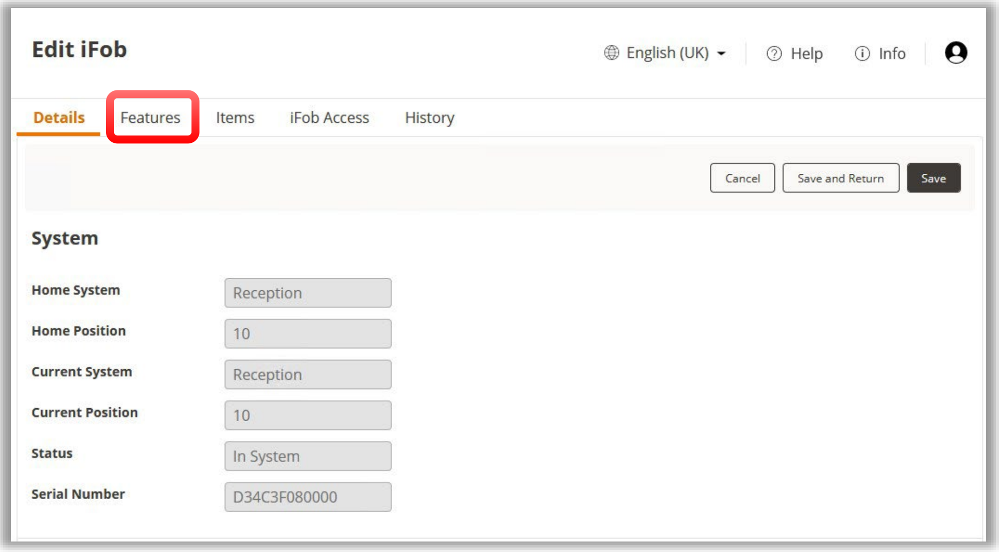
Occasionally, it may be necessary for an administrator to override an incorrect logging or change the current values of a logging if, for example, a vehicle has been replaced.

NOTE: It is possible to combine the keys of a new vehicle with the same iFob as the vehicle that is being replaced. The logging history will however remain with the iFob, but the current details can be reset to suit the Fuel, Distance and Location of the new vehicle.

1. In the System Viewer, select the item that requires editing then click on **Edit iFob**.

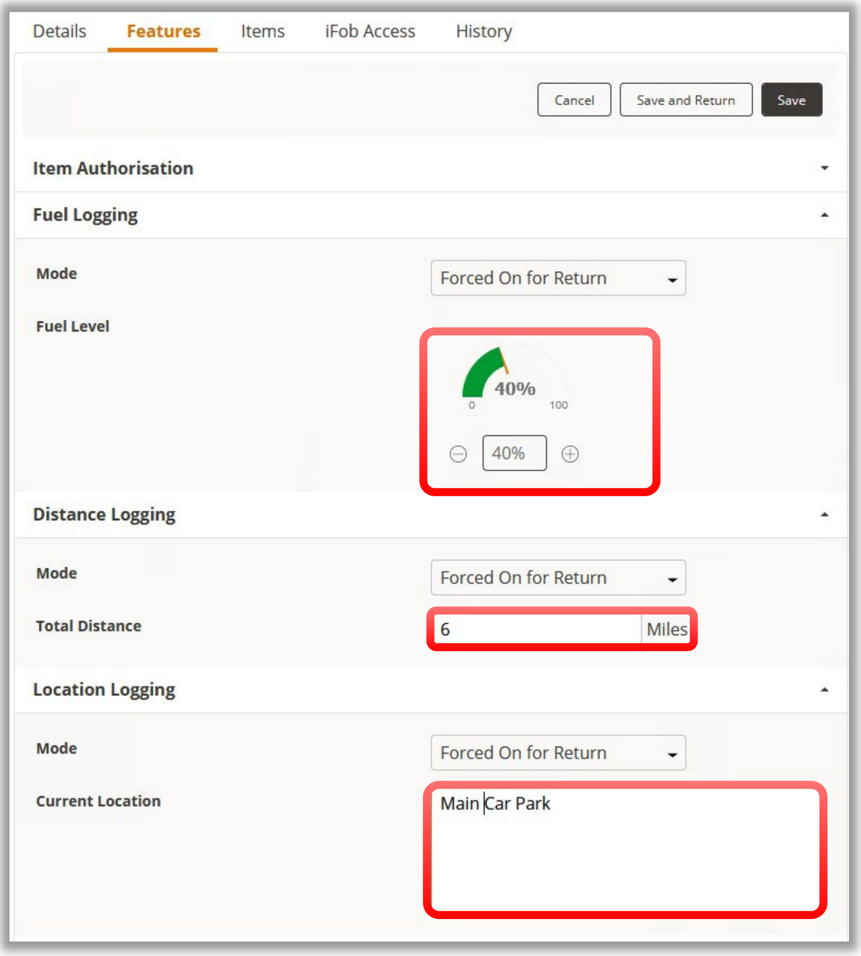


2. At the 'Edit iFob' screen, click on the Features tab.



3. Depending on which features have been enabled, at the 'Features' screen, a user can edit the values for the Fuel, Distance and Location to suit the new vehicle.

NOTE: The Fuel Level can only be adjusted using the Plus and Minus buttons.



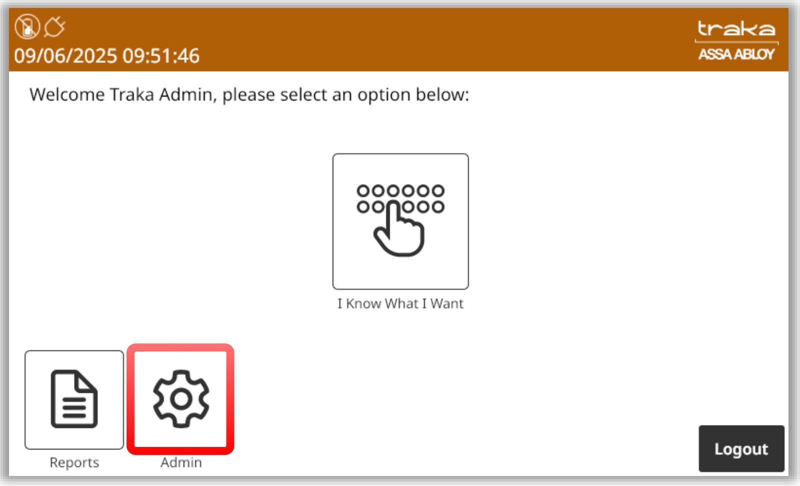
4. Once completed, click **Save and Return**.

NOTE: When an override change is made in this way through TrakaWEB, the name of the user who made the change will not be visible in the System Viewer report. This is because it is not currently possible for TrakaWEB to know which user made the edit. Whereas Traka Touch can determine users by their login details.

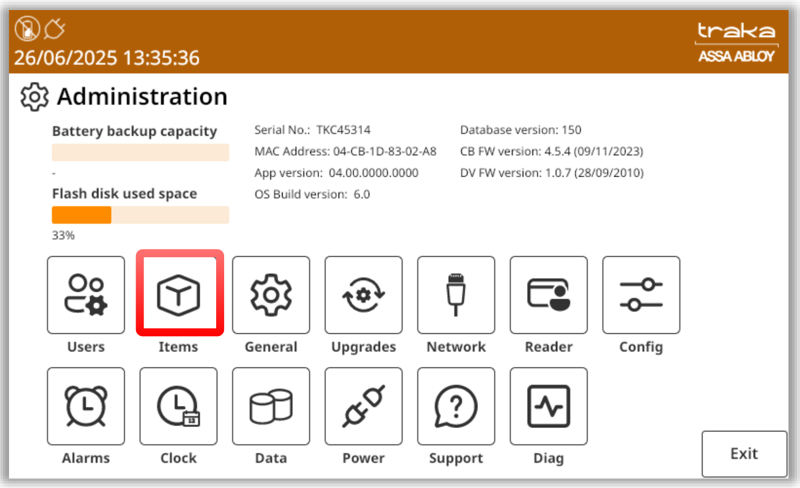
6.8.4 OVERRIDE LOGGING AT TRAKA TOUCH

It is possible to override the fuel, distance, and location values within the **Item Administration** screen in Traka Touch.

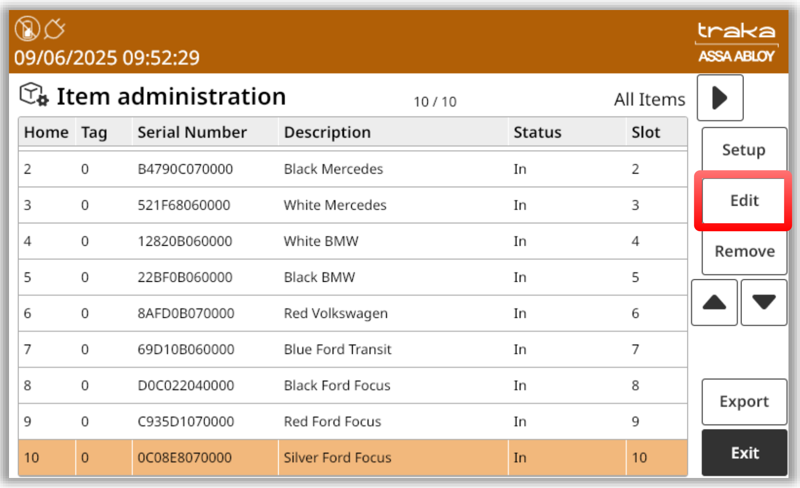
1. Log in to the Traka Touch system as an Admin user and then click on **Admin**.



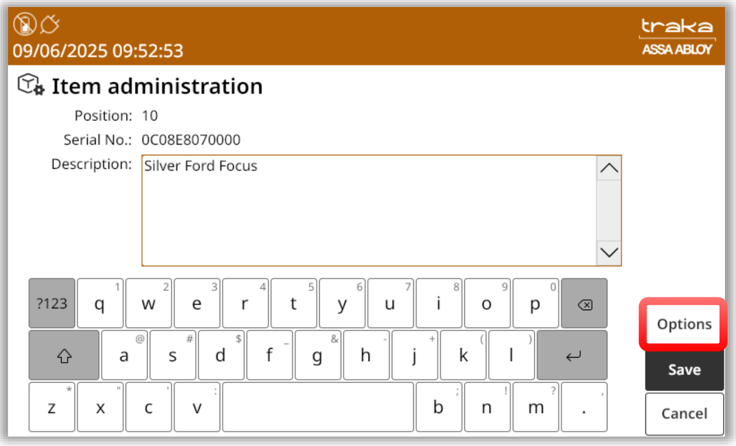
2. Now click on the **Items** button.



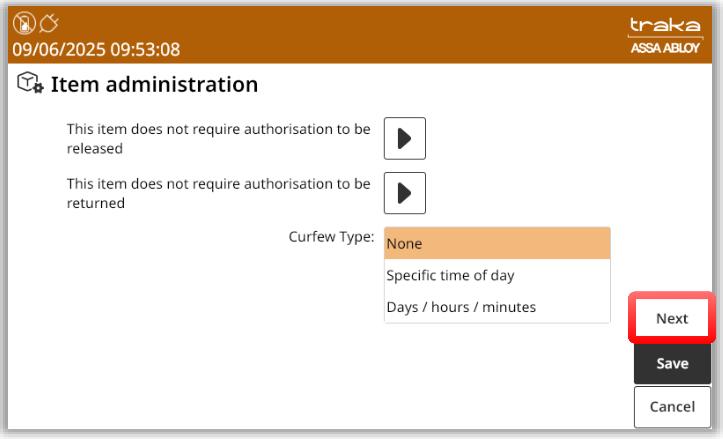
3. At the next screen, select the item for editing and then click on the **Edit** button.



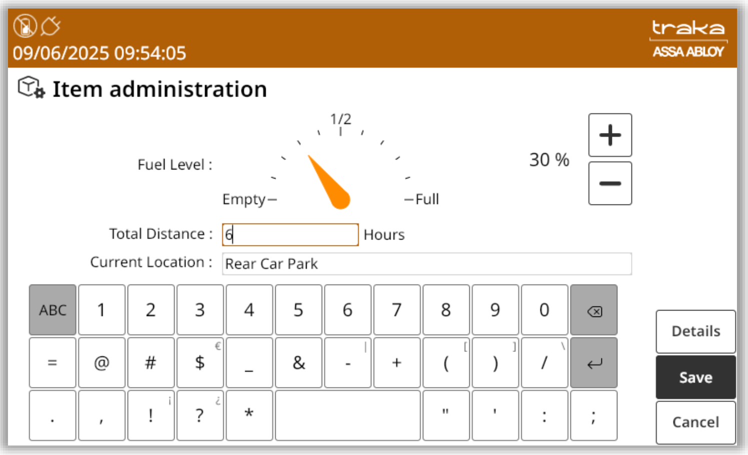
4. At the 'Item Administration' screen, click on **Options**.



5. At the next screen, click on the **Next** button.



6. Depending on which features have been enabled, the next screen will allow a user with administration access to change the fuel, distance, and location values by rotating the fuel level dial and manually entering values using the alphanumeric keypad.



7. Once you have made the required changes, click on **Save.**

NOTE: There is no override option for Location Logging in Traka Touch if you are using RRMS with Location Logging.

6.9 ITEM HANDOVER

Item Handover is a cost option that allows a user who has access to the system to 'hand over' an item to a user who is in the database but does not have access to the system. This feature is beneficial for customers who may want certain higher-ranking members of staff to issue keys or assets to other staff members throughout the business, but do not want the secondary staff member to have access to the system.

6.9.1 ENABLE THE OPTION

Item Handover will need to be enabled in the system configuration file before it is usable in TrakaWEB and at the Traka Touch. To have it enabled within the configuration you will need to contact Traka or your distributor for further details.

6.9.2 TYPES OF USERS

To be an Authoriser, Recipient or both, an option will need to be enabled in the users' details.

Handover Authoriser - A user with authorisation to hand an item over to another user is known as a 'Handover Authoriser'. This is a user that has access to the system and the item they wish to 'hand over'.

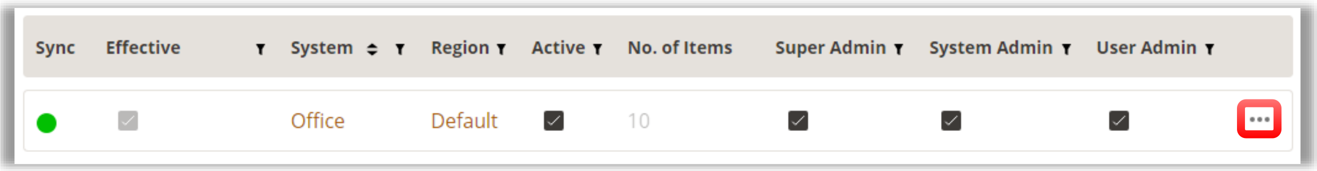
Handover Recipient - A user who does not have access to the system but exists in the TrakaWEB database. When these users are created, they do not need Keypad IDs, Credential IDs, PINs etc.

Handover Authoriser & Recipient - A user with authorisation to hand an item over to another user and receive an item handed to them. This is a user that has access to the system and the item they wish to 'hand over'.

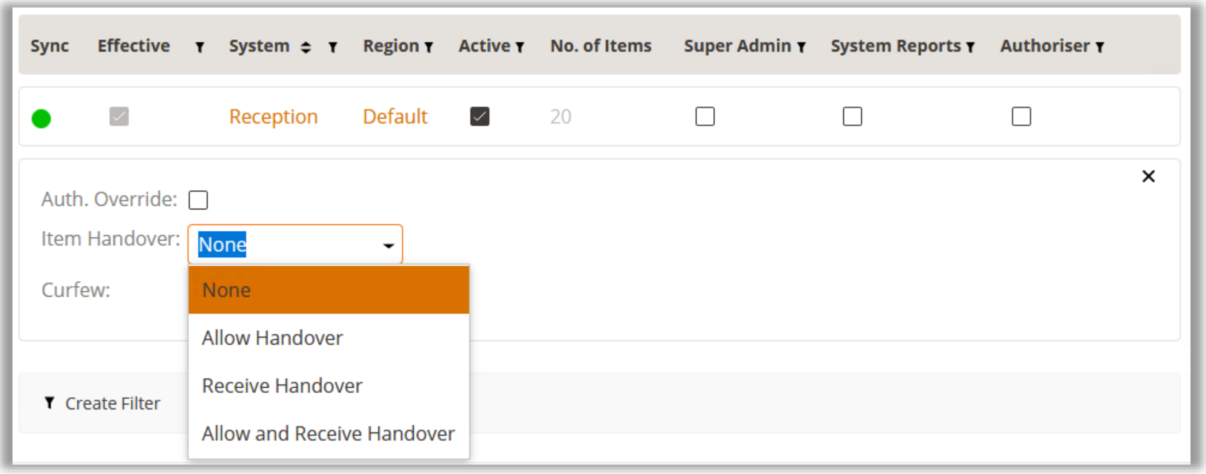
6.9.3 SETTING UP USERS

If you need to add new users to your database, please refer to the Adding Users section.

1. From the Navigation Menu on the left-hand side of the screen, select the **Users** button.
2. Highlight the desired User. If you need to add a new user, click the **Create** button.
3. Select the **Edit** button or double click the user.
4. Navigate to the **System Access** tab.
5. On the list of systems, choose the system you wish to grant the user rights to hand over items and select the **Ellipsis** symbol on the right-hand side of that system's field.



A new panel will open. The panel will have a field called **Item Handover**. The drop-down selection box consists of the following options:



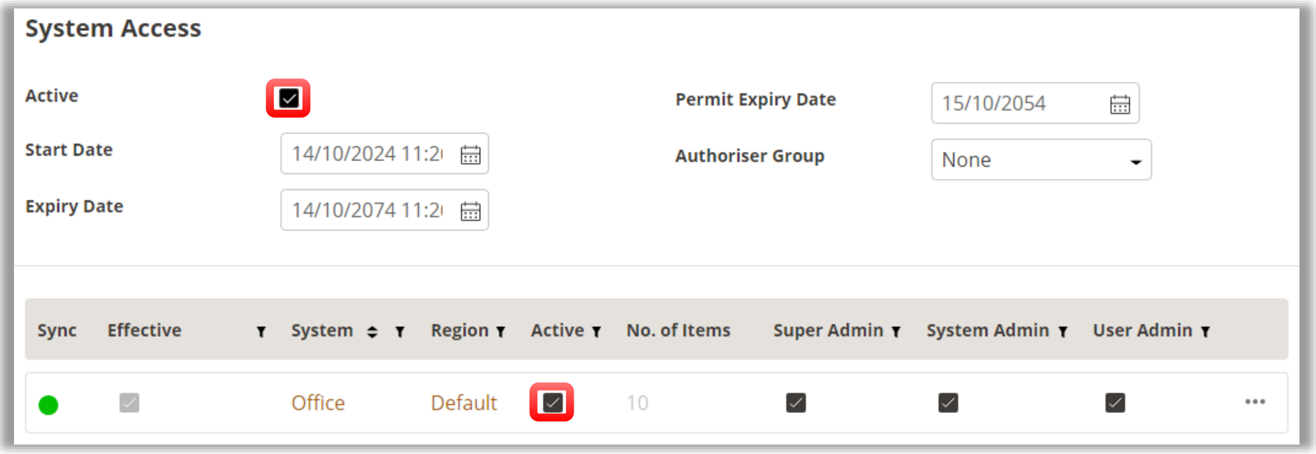
- **Allow Handover** - User may legitimately hand items over to a user who is allowed to receive a handover (handover recipient). At the point of item removal, the user will be prompted to define who the item is to be handed over to, if anyone (handover authoriser).

- **Receive Handover** - User is allowed to receive items which were removed from a system by a user who was authorised to handover those items (handover recipient).

- **Allow and Receive Handover** - Allows a user to both hand over items to a recipient and receive items from an authoriser.

NOTE: Only when Item Handover is enabled in the configuration file will the column be visible in the user grid.

6. For handover recipients, you will need to tick the active tick box at the top of the system access page and in the system line as well.



7. After making your selection, click the **Save and Return** button.

8. You will need to repeat this process for any users that need to be handover authorisers/recipients.

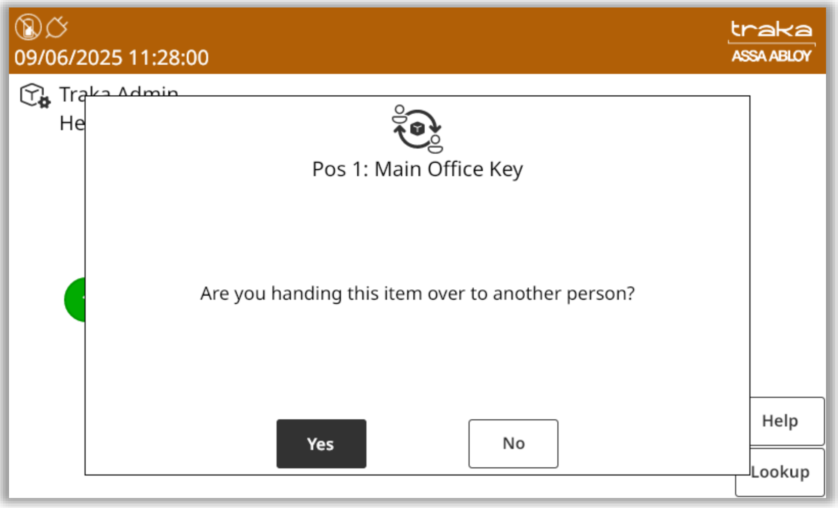
6.9.4 ITEM HANDOVER ON TRAKA TOUCH

NOTE: It is not possible to assign user authoriser/recipient roles at the Traka Touch system. This must be done in the user details in TrakaWEB.

1. A user with handover authorisation identifies themselves to the system and accesses the item selection screen.
2. The user will need to select an item to hand over.
3. The system will ask the user if they are handing the item over to another user.

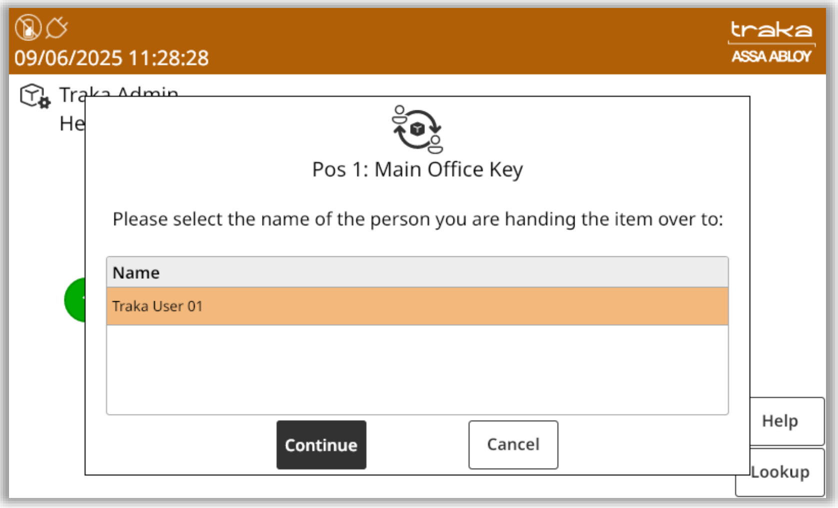
   a) **Yes** - If selected, the process will continue, please see step 4.

   b) **No** - If selected, the message will disappear allowing the item to be removed (providing the user has access).



4. Once they have selected Yes, the system will display a list of users that are eligible to have the item handed over to them.

NOTE: This list will be populated by users that have the 'Allow Handover' option enabled in their system access details.

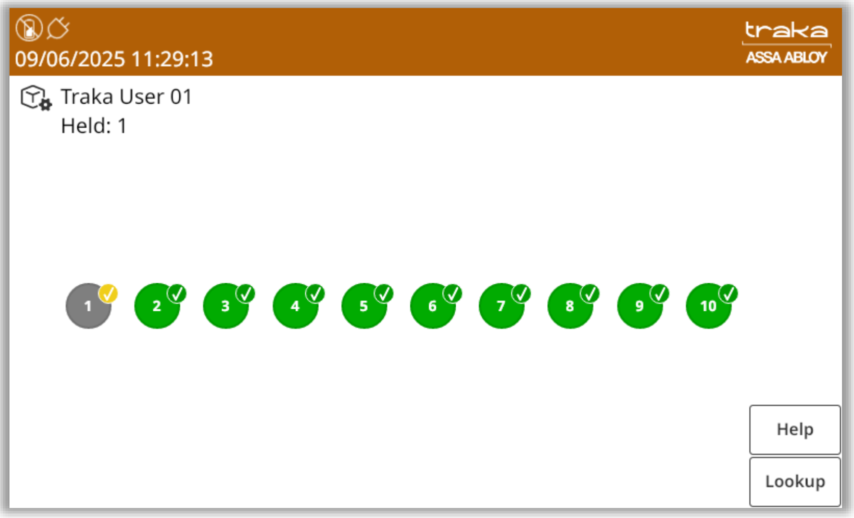


5. Select the desired user and click **Continue**.

NOTE: Clicking Cancel will take the user back to the item selection screen.

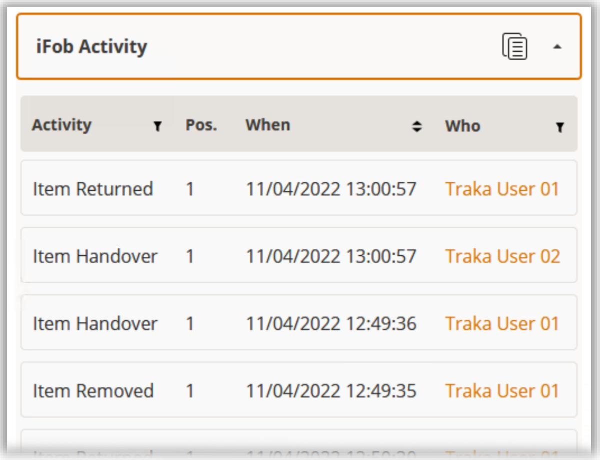
6. The item will then be released from the system.

7. The symbol for the removed item shows that it is out to another user, indicating that the handover was successful.



6.9.5 ITEM HANDOVER ACTIVITIES

The System Viewer displays a grid that holds the last 30 days of activities for the selected iFob/item in the system. When a user hands an item to another user an 'Item Handover' activity will be generated in the iFob Activity panel. When the user returns the item, another Item Handover activity will be generated with the recipients.

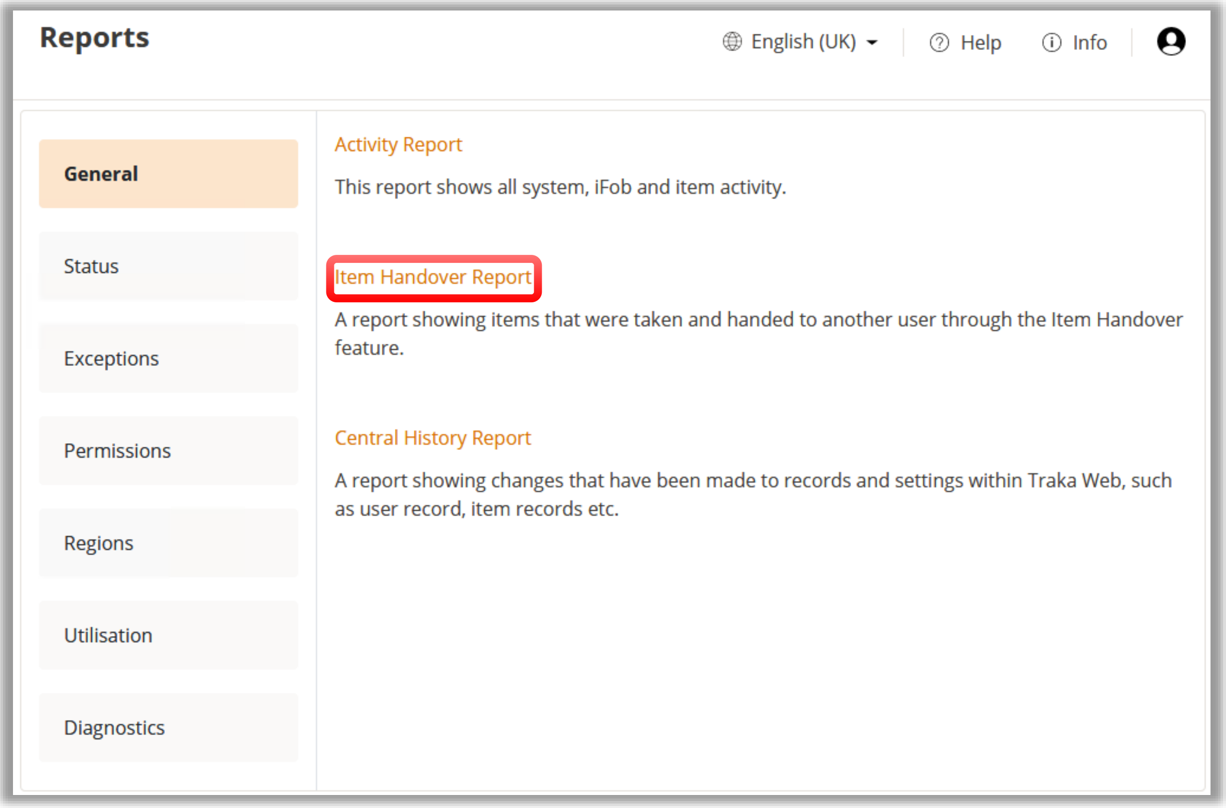


6.9.6 ITEM HANDOVER REPORT

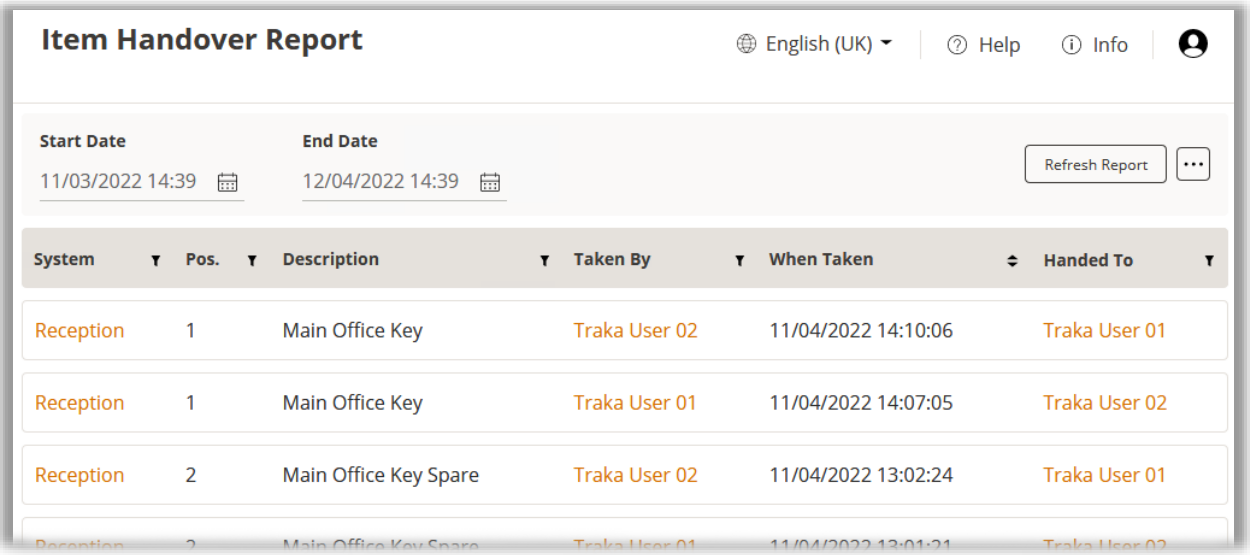
You can run a report that shows items that were taken from the system and handed to another user through the Item Handover feature.

To read more on how to access and generate reports, please refer to the Reports Overview section in this document.

To generate a specific Item Handover Report, from the Navigation Menu select **Reports**, and then **View Reports**. In the **General** section, you will see the **Item Handover Report**. Click on its name.



Once you have chosen the Report, the screen will display the default report for the last 30 days. Using the Toolbar, you can change the timeframes for the report or refresh it to include the most recent events.



6.10 RANDOM RETURN TO MULTIPLE SYSTEMS (RRMS)

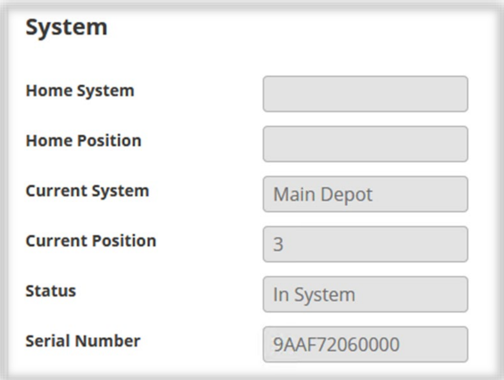
6.10.1 RRMS OVERVIEW

Random Return to Multiple Systems (RRMS) is a cost option feature that allows Items to be taken from one key control system to another that are connected to the same TrakaWEB instance.

RRMS is available for Traka Touch key cabinets being managed with TrakaWEB Professional Plus. If enabled for a cabinet, RRMS applies to the entire cabinet. Access rights will be based on categories of fobs ("Access Groups") rather than individual fobs. With the exception of Location Logging, RRMS cannot be used with any other optional Traka Touch or TrakaWEB functionality, or with the User Import Spreadsheet feature. Searches, Status enquiries and some Reports work very differently on systems with RRMS.

NOTE: It is not possible to grant a user direct access to a RRMS Item, this must be done via a Common Item Access Group.

Identifying Items in a RRMS deployment is slightly harder than in a Fixed Return to a Single System (FRSS) system due to the Item not having a fixed home, which in turn makes it harder to work out which key is which. In FRSS systems, plastic or metal tags would traditionally be used to identify the fixed system and position the Item should be returned to. However, with RRMS an Item does not have a specific home and therefore a different approach is required.



NOTE: In RRMS, the Item will not have a Home System and Home Position and thus you will not be able to edit them.

The Tag Number feature of TrakaWEB allows a unique numeric Tag Number to be recorded against each Item in TrakaWEB which would correspond to a plastic or metal Key Tag attached to the physical keys. This can be any number that makes sense to the end user and does not need to correlate to a system or position.

Reporting in TrakaWEB accounts for the fact that Items can travel from system to system and so extra columns may appear in reports where additional information needs to be presented to provide a complete picture of activity.

Due to the nature of RRMS, some functionality may be limited or not available compared to FRSS or RRSS deployment.

6.10.1.1 RRMS CONSIDERATIONS

Once the RRMS configuration has first been set up, only an admin user will be able to remove and return Items. A non-admin User will only be able to remove and return Items once the User and Items have been assigned to a Common Item Access Group.

6.10.1.2 LIMITATIONS

The following limitations currently apply to RRMS:

- RRMS will only function with TrakaWEB and is not available on standalone Traka Touch systems
- RRMS cannot be used on standard or non-RFID lockers of any kind

RRMS will not function with any of the following software options:

- User Import/Export Spreadsheet
- 16bit Systems
- 16bit Lockers
- Touch Lockers
- Rack Manager
- DockSafe
- Transfer Ownership
- Curfews
- Abloy Keyholder
- Item Booking
- Item Allowance
- Authorisers
- Item Handover
- Duress Item Position
- Vault Pairing
- Illegal handover alarm event
- Touch Import Spreadsheets

The following Feature Options are not currently compatible with RRMS:

- Access Schedules
- Fault Logging
- Reason Logging
- Notes Logging
- Distance Logging
- Fuel/Charge Level Logging
- Custom Messages

6.10.2 RRMS & COMMON ITEM ACCESS GROUPS

The regions of ANY type of group affect who can 'see' and be added to that group (or will be automatically added in the case of an Everyone Group).

A normal Item Access Group can only contain items from the systems to which the group applies. So, a 'Region A' Item Access Group can only contain items from 'Region A' systems.

For **Common Item Access Groups**, although the region still controls the visibility of the group in exactly the same way, the items it contains can only ever be RRMS items. RRMS items have no home system and no home position (they are essentially unallocated iFobs). As these items would never be limited to coming from a particular system, you can always add ANY unallocated item to a single Common Item Access Group.

NOTE: Once an item has been added to a Common Item Access Group, it cannot be added to any subsequent groups.

Users may expect that items that are physically bound to a department or building would be filtered to the region that the systems are in but that is not the case. The allocation of RRMS items into Common Item Access Groups is essentially inferring the systems which that item can be placed into - hence the 'Common Item Access Group' term. If an item is placed into a system outside those regions, it will be unrecognised and only removable by an Administrator.

To summarise:

- An **Item Access Group** collects together similar iFobs/Items from one or more systems that can be granted to a number of users of those systems. Each item retains its individual access level
- A **Common Item Access Group** collects iFobs/Items together and gives them all the same access level across all the visible systems/regions in the group. This can then be applied to multiple users of those systems

6.10.3 TRAKA TOUCH

Much of the Traka Touch functionality will be reduced for Systems with RRMS Enabled. For more information, please refer to **UD0011 – Traka Touch User Guide.**

6.10.4 ENABLING THE OPTION

A configuration file will be required to enable RRMS, which can be obtained from Traka. To load the configuration file, please refer to **UD0011 – Traka Touch User Guide**.

IMPORTANT: Ensure that the Traka Touch system is not connected to TrakaWEB before enabling the RRMS configuration.

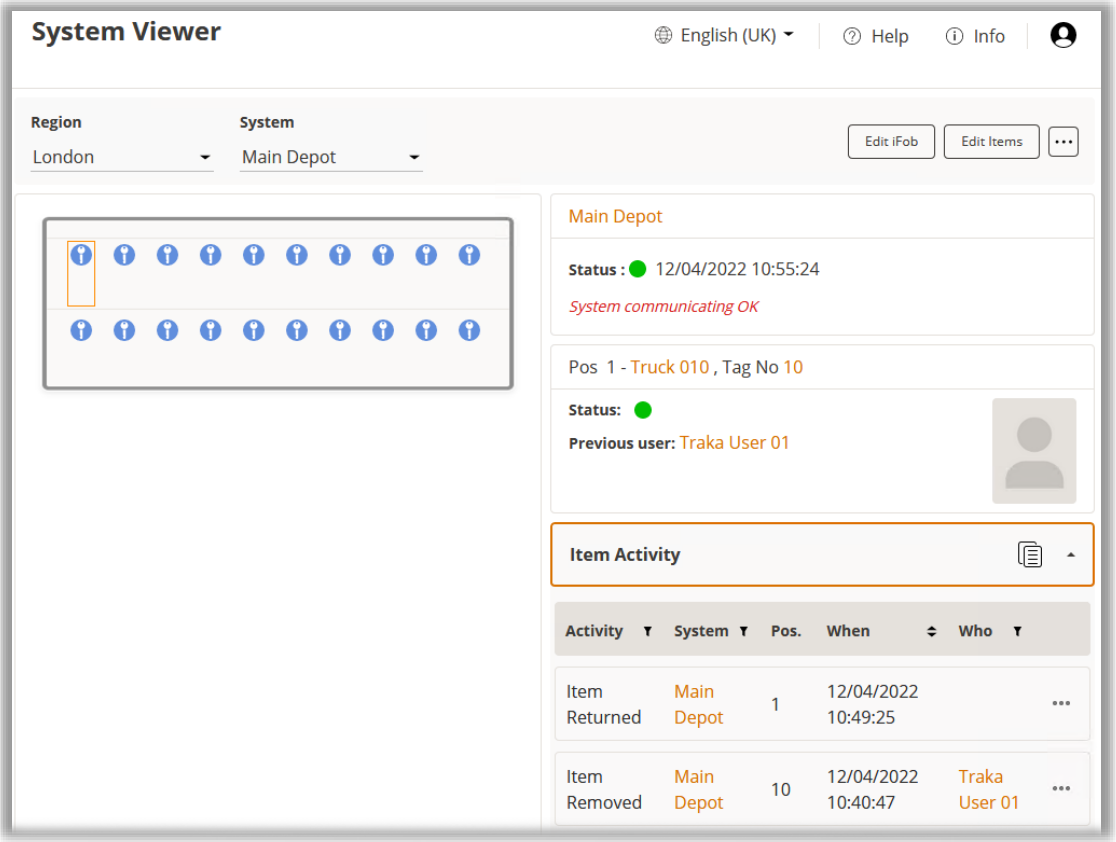
IMPORTANT: It is of critical importance that the installation of RRMS is done on a clean Traka Touch system. The configuration must be loaded when first prompted after the database has been reset. The system will then be converted from FRSS to RRMS. If this is not done, RRMS will not function correctly.

6.10.5 TRAKAWEB SYSTEM VIEWER

With RRMS enabled, the System Viewer will only show information about iFobs/Items that are currently in the systems.

NOTE: For positions that do not have an iFob present, no history will be displayed.

The Item Activity and iFob Activity grids both have a System and Position column added. This is so that a full history can be viewed for an iFob/Item as it travels from System to System over time.

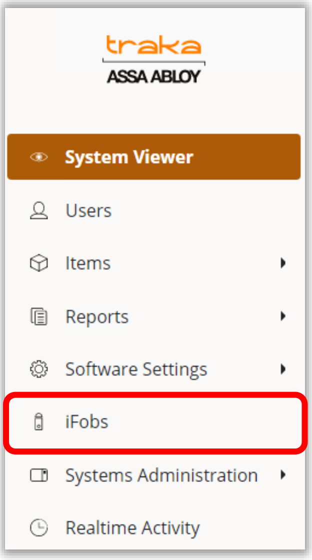


NOTE: The Transfer Ownership option in the Ellipsis menu is currently not available for RRMS systems.

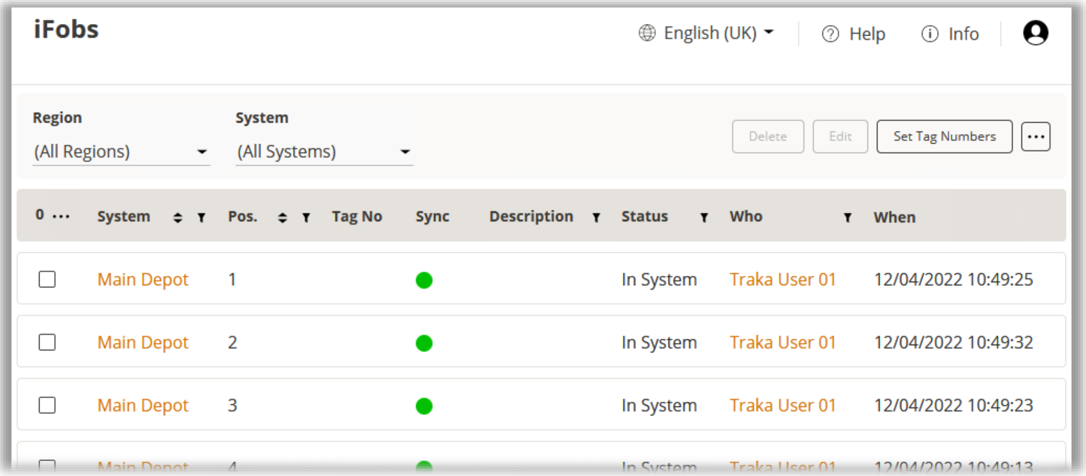
6.10.6 ASSIGNING TAG NUMBERS

Each key or key bunch will be assigned a physical tag which should correspond with the same tag number within TrakaWEB. Tag numbers in TrakaWEB can only be created or edited by a user with the Edit iFob Software Permission. The Tag Number will be synchronised with the iFob, and the Tag Number will be stored in the iFob's memory. The Search function in Traka Touch can be used to locate an iFob by entering the Tag Number into the search.

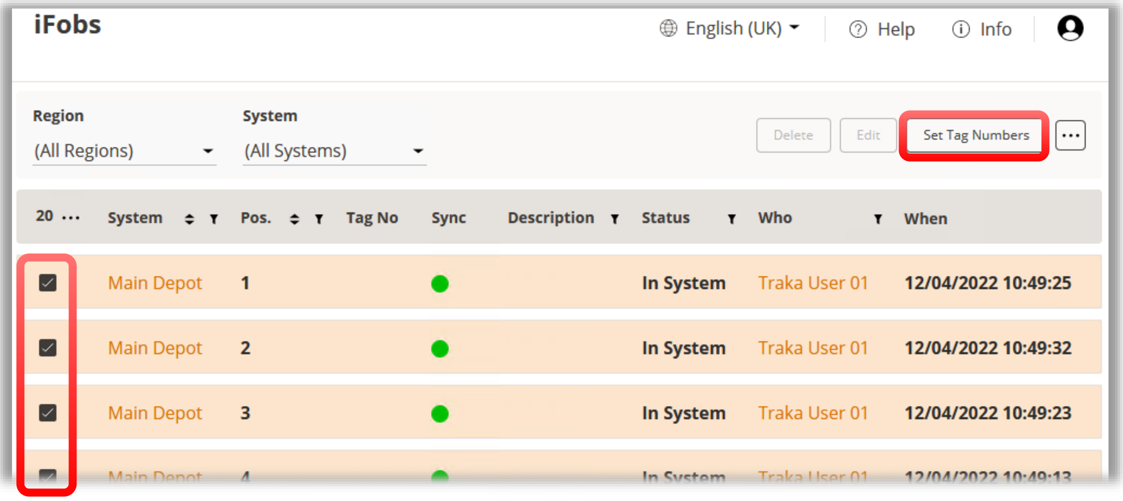
1. Click on **iFobs** in the Navigation Menu.



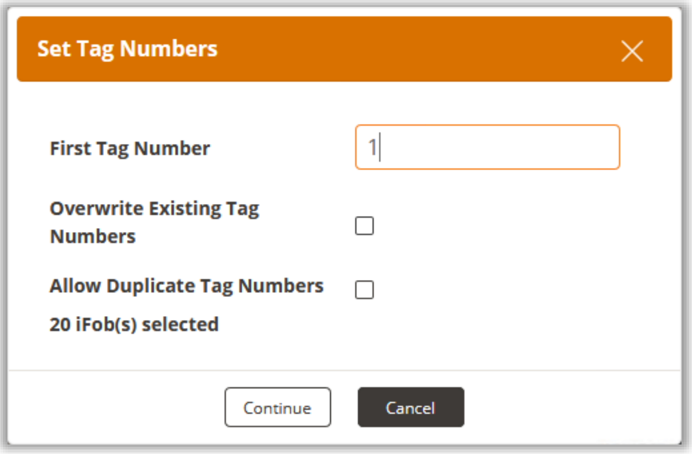
At the iFobs screen, you will see a list of all the current iFobs in the selected systems.



Click the checkbox of the corresponding position for the iFob you wish to assign a Tag Number to and then click on the **Set Tag Numbers** button on the Toolbar. Alternatively, multiple checkboxes can be selected to assign Tag Numbers automatically in sequential order by using the Multi-Select/Multi-Edit functionality to select all iFobs on page.

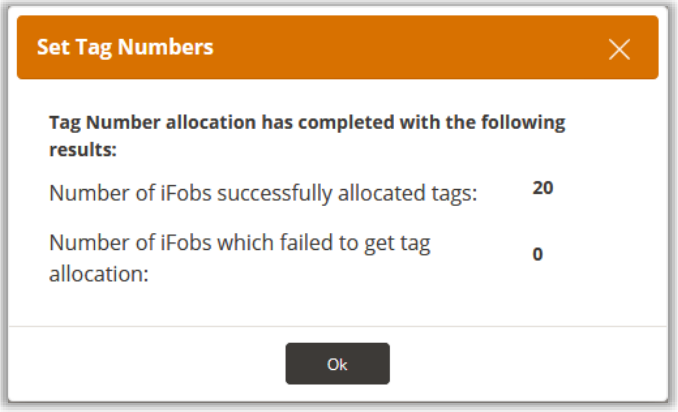


After clicking on **Set Tag Numbers**, a window will appear allowing you to manually insert a Tag Number. There are also 2 optional check boxes that will enable you to overwrite existing tag numbers or allow duplicate numbers.



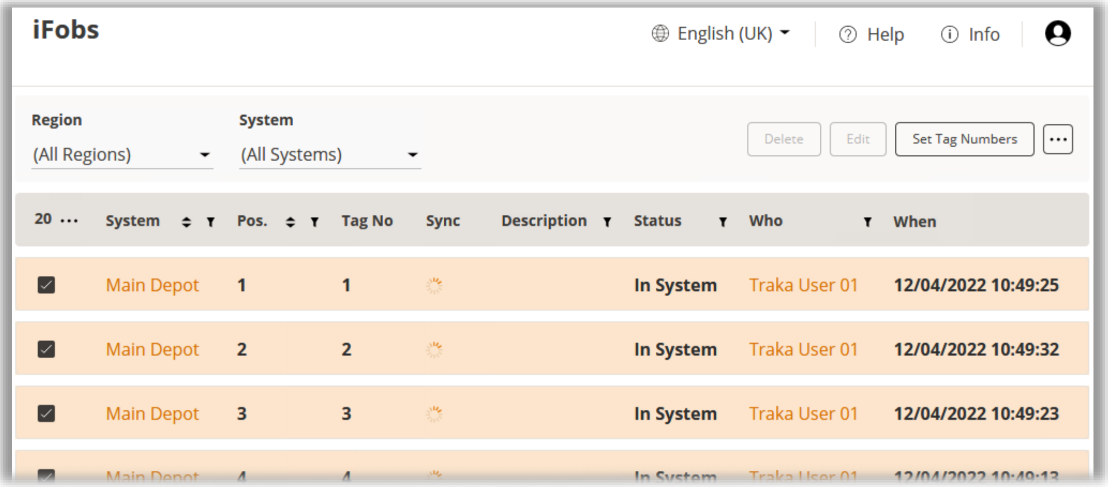
2. After you have inserted the correct Tag Number and selected any of the optional checkboxes, click on **OK**.

A window will appear showing the results of the process.



3. Click on **OK** to continue.

The iFobs screen will now display the newly created Tag Numbers. This process can be repeated to add Tag Numbers to iFobs as required.



The Tag Number will be synchronised with the iFob, and the Tag Number will be stored in the iFob's memory.

NOTE: If the administrator chose to overwrite existing tag numbers, any iFobs that already have a Tag Number will be overwritten.

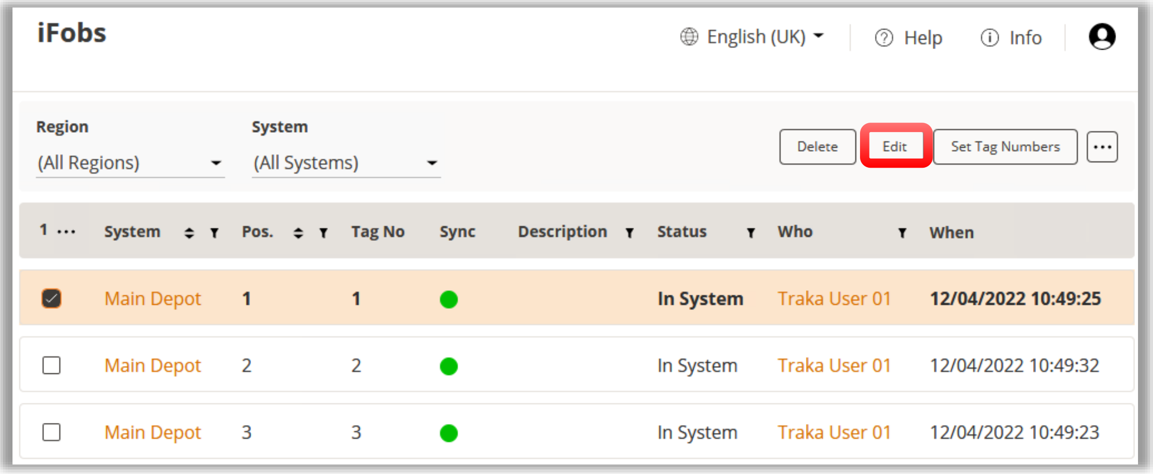
NOTE: If the administrator chose to allow duplicates, no checks will be made during the application of the tag numbers.

NOTE: If the administrator chose not to allow duplicates, any tag numbers that are already in use will be skipped.

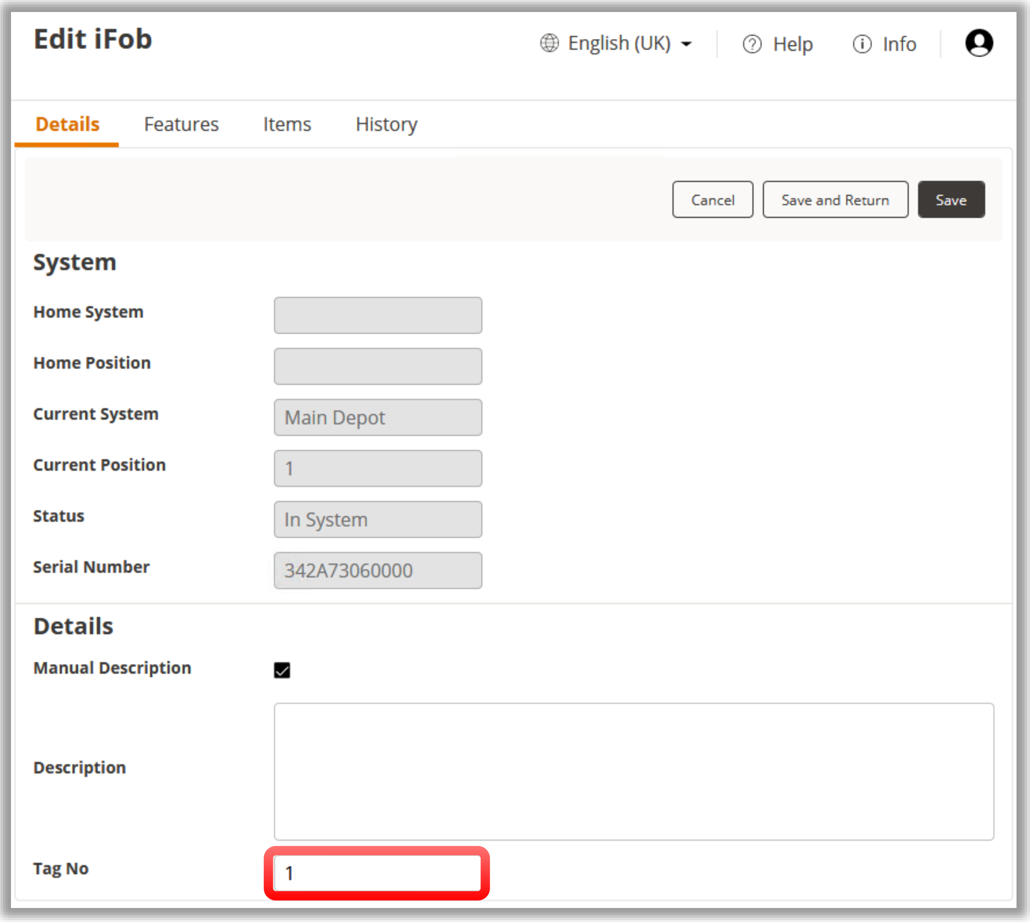
6.10.6.1 EDITING TAG NUMBERS

Should you wish to edit a Tag Number for an iFob, this can be achieved by accessing the iFobs page from the Navigation Menu.

1. Click on the checkbox for the iFob or iFobs with the Tag Number you wish to edit and then click on the **Edit** button.



At the Edit iFob page, you can now change the Tag number as shown below:



2. Once completed, click on **Save and Return**.

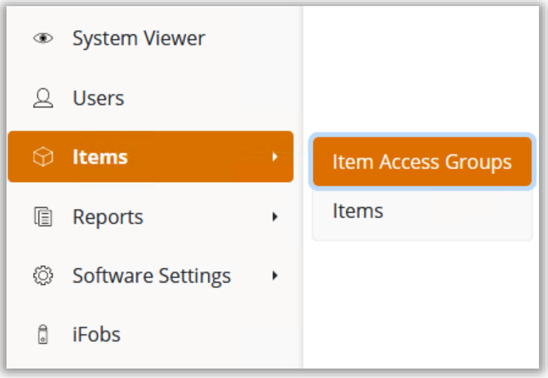
NOTE: To clear a Tag Number, enter '0' as the Tag Number value and then click Save.

6.10.7 COMMON ITEM ACCESS GROUPS

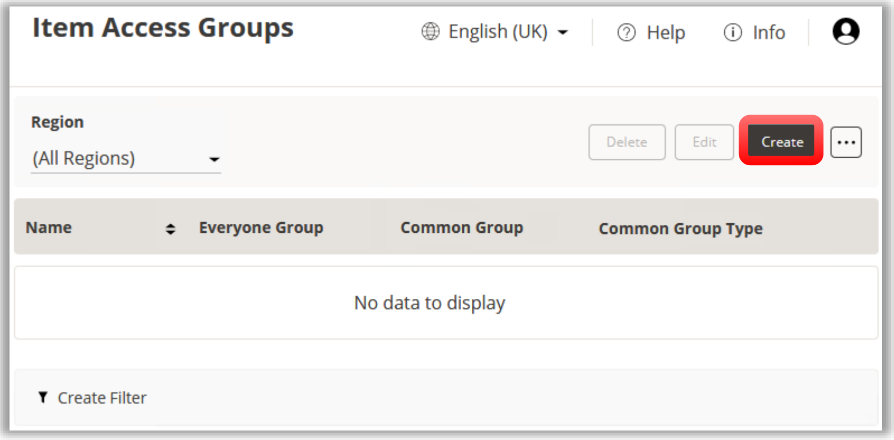
Item Access Groups with the 'Common Group' option ticked in TrakaWEB will be known as a 'Common Item Access Group'. This will be used to apply a common access right to all Items that are a member of the group that can be shared across multiple systems to which the item can be returned. For more information on Item Access Groups, refer to the Item Access Groups section in this document.

NOTE: The 'Common Group' option will only appear if one or more systems are configured with RRMS in the TrakaWEB database.

1. From the Navigation Menu, select **Items**, and then **Item Access Groups**.

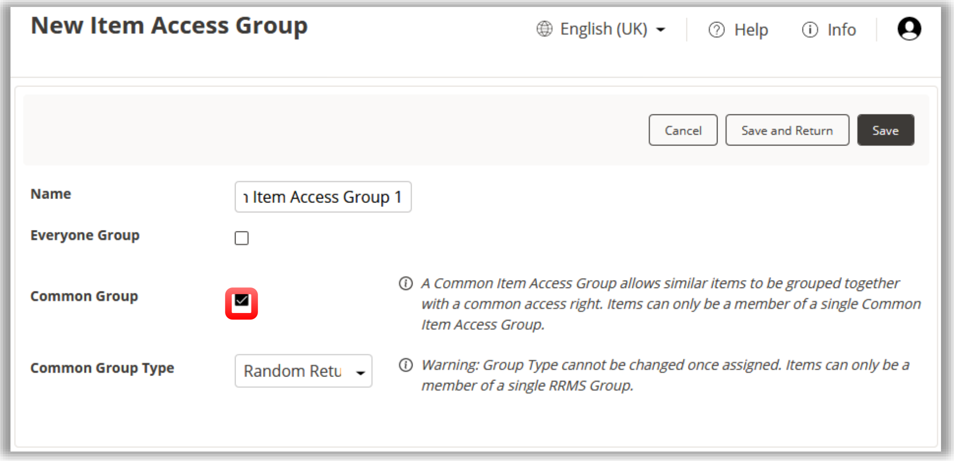


2. At the **Item Access Groups** page, click on the **Create** button.



3. At the next screen enter a name for the New Item Access Group.

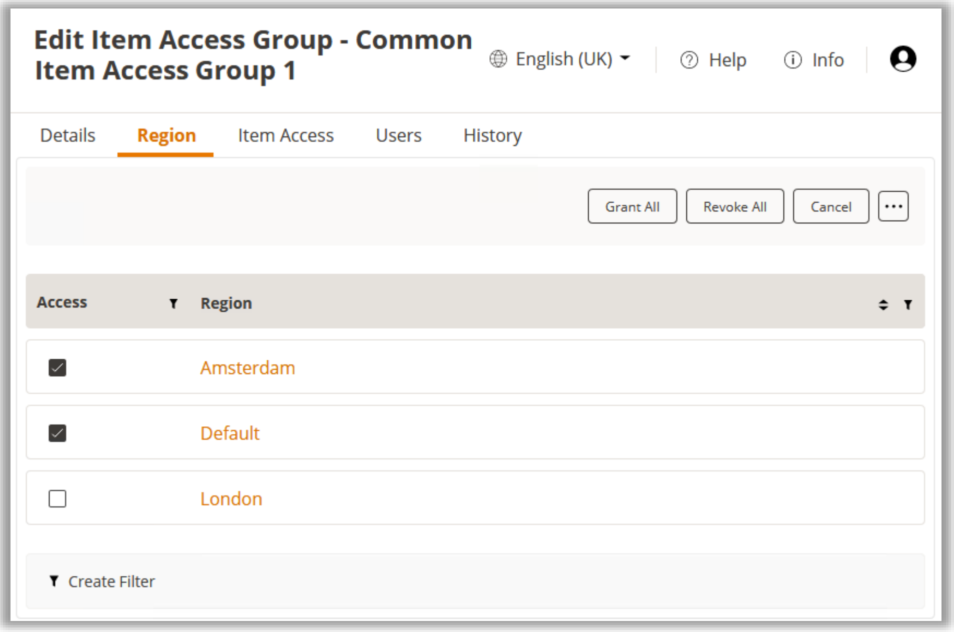
4. To create a common Item Access Group, place a tick in the **Common Group** checkbox. If all the systems defined in TrakaWEB have RRMS enabled, the Common Group option will be ticked by default.



5. Make sure that the selected **Common Group Type** is Random Return to Multiple Systems.

6. Click on the **Save** button.
7. Next, click on the **Region** tab.

Regions control the visibility of the Common Item Access Group in the same way as a standard Item Access Group.



The Region will also determine which systems the associated Items of the common Item Access Group can be returned to. For more information on Regions, refer to the Regions section in this document.

NOTE: If an Item is returned to a RRMS system that is outside the scope of the Common Item Access Group's region, the Item can be returned but will no longer be accessible to standard users. In this case, only an Admin User can remove it.

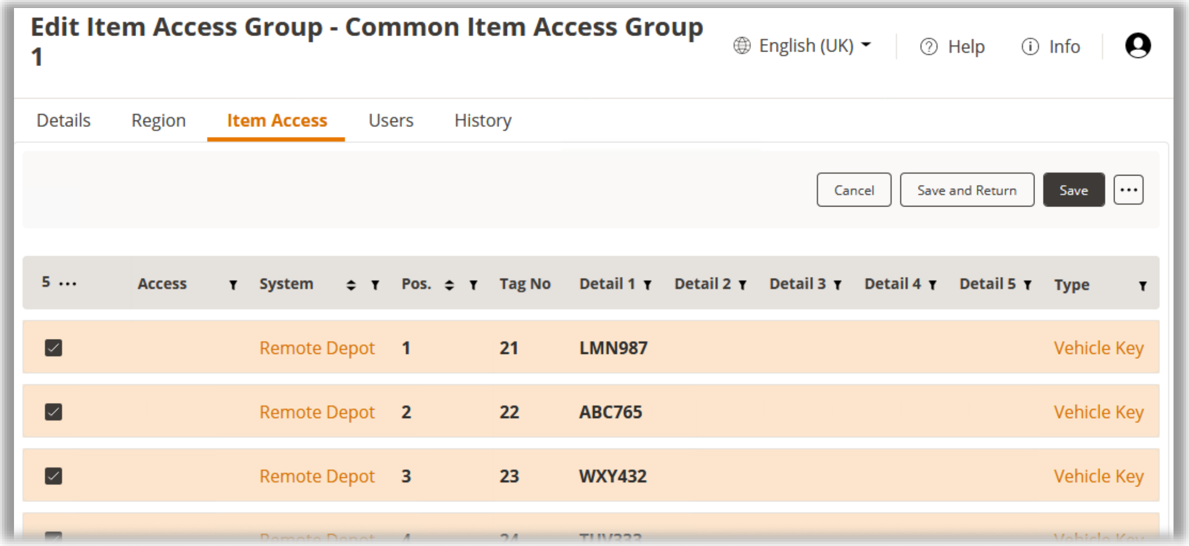
8. Choose the regions where your Common Item Access Group will be active and click on **Save.**

6.10.7.1 ASSIGN ITEMS TO COMMON ITEM ACCESS GROUPS

1. Click on the **Item Access** tab.

You will now be taken to the page where you can add iFobs to the selected Common Item Access Group.

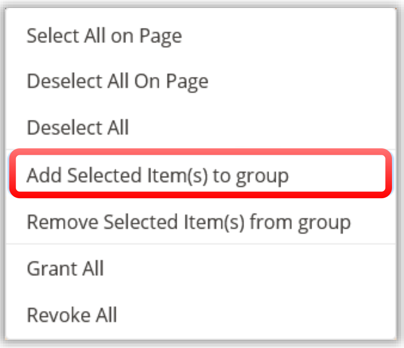
2. Click on the checkboxes for the iFobs you wish to add to your Common Item Access Group. If you wish to select all available Items, you can use the Multi-Select/Multi-Edit functionality of **Select All on Page**.



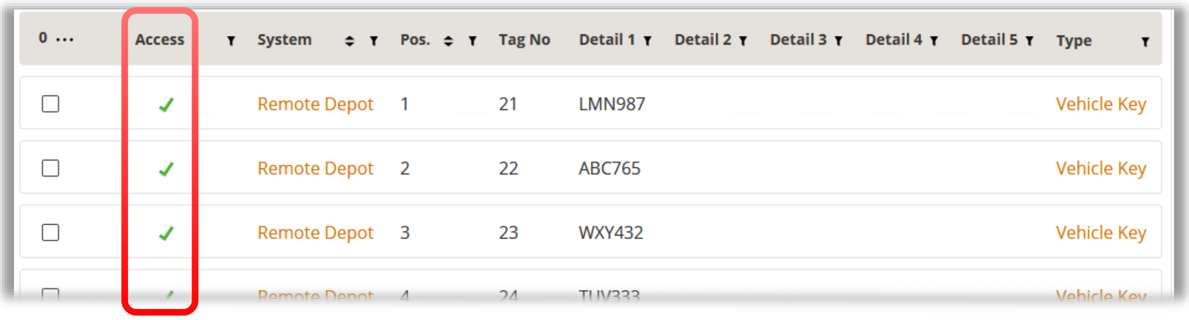
NOTE: An iFob/Item can only belong to a single Common Item Access Group.

NOTE: Items that are assigned to a FRSS or RRSS are not able to form part of a Common Item Access Group.

3. Using the Multi-Select/Multi-Edit menu, select the option to **Add Selected Item(s) to group**.



When the Items have been added to the group, you will see green ticks in the Access column next to each of the added Items.



4. Once completed, click on **Save**.

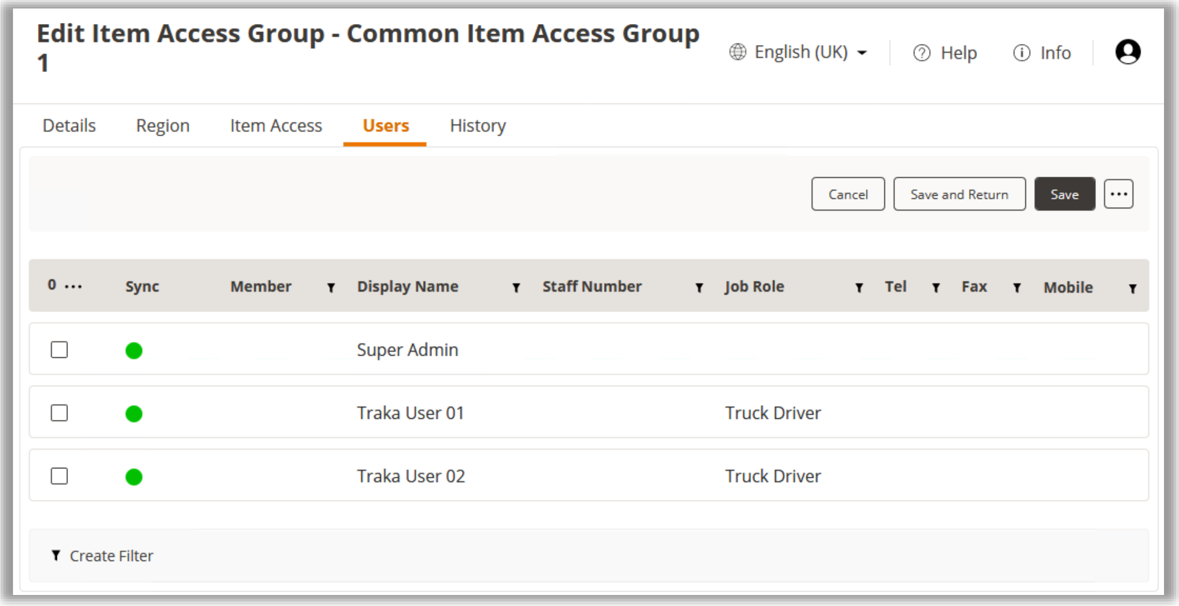
6.10.7.2 ASSIGN USERS TO COMMON GROUPS

With the iFobs assigned to a Common Item Access Group, you can now select which users will have access to that Group. This will determine which iFobs they will be allowed access to.

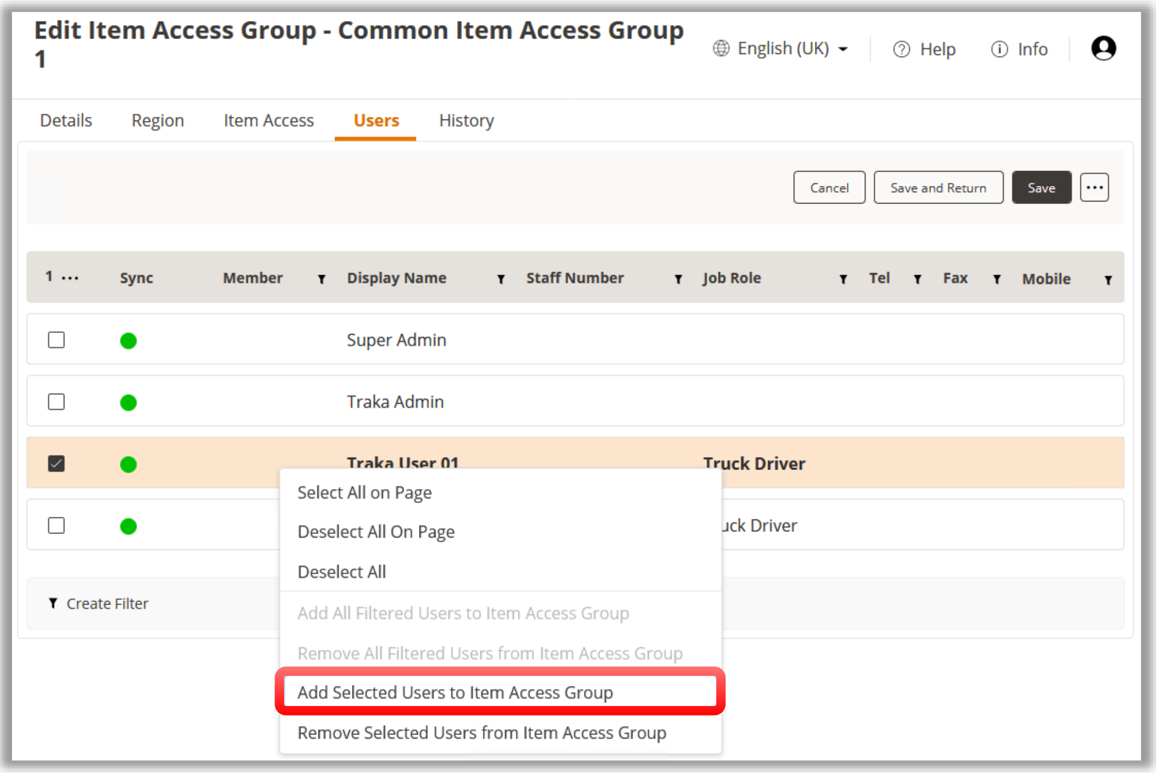
1. While still in the Edit Item Access Group menu, click on the **Users** tab.

2. You will see a list of all Users who can join the group.

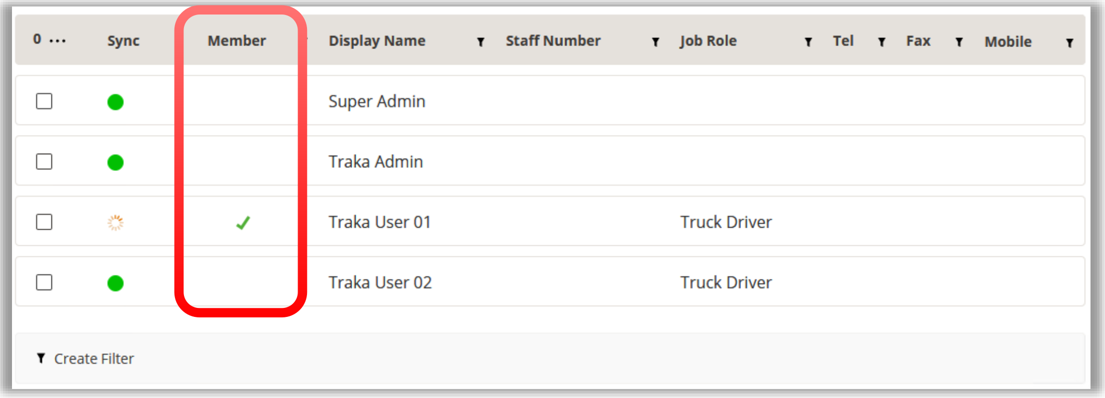
NOTE: The list will only contain the Users who are active in ALL Regions where the Common Item Access Group is enabled.



3. Select the Users whom you wish to be members of this Common Item Access Group and, using the Multi-Select/Multi-Edit functionality, add your selected User(s) to the group.



4. When the User(s) have been added to the group, you will see a green tick next to their name(s) in the Member column.



5. Once you have made your selection, click on **Save and Return**.

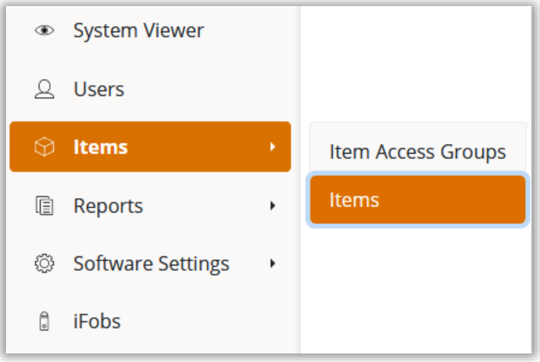
6.10.8 TRAKAWEB - SEARCHING FOR IFOBS

A system with RRMS enabled will only retain information about the iFobs/Items that are currently in the system. If an iFob/Item is removed, then the System will only retain the event history and will not store any details of the actual iFobs/Items.

This means that the function of a Traka Touch System can only search for the iFobs/Items that are in the System.

Where a wider scale search is required across multiple systems, it is more practical to search for Items in TrakaWEB.

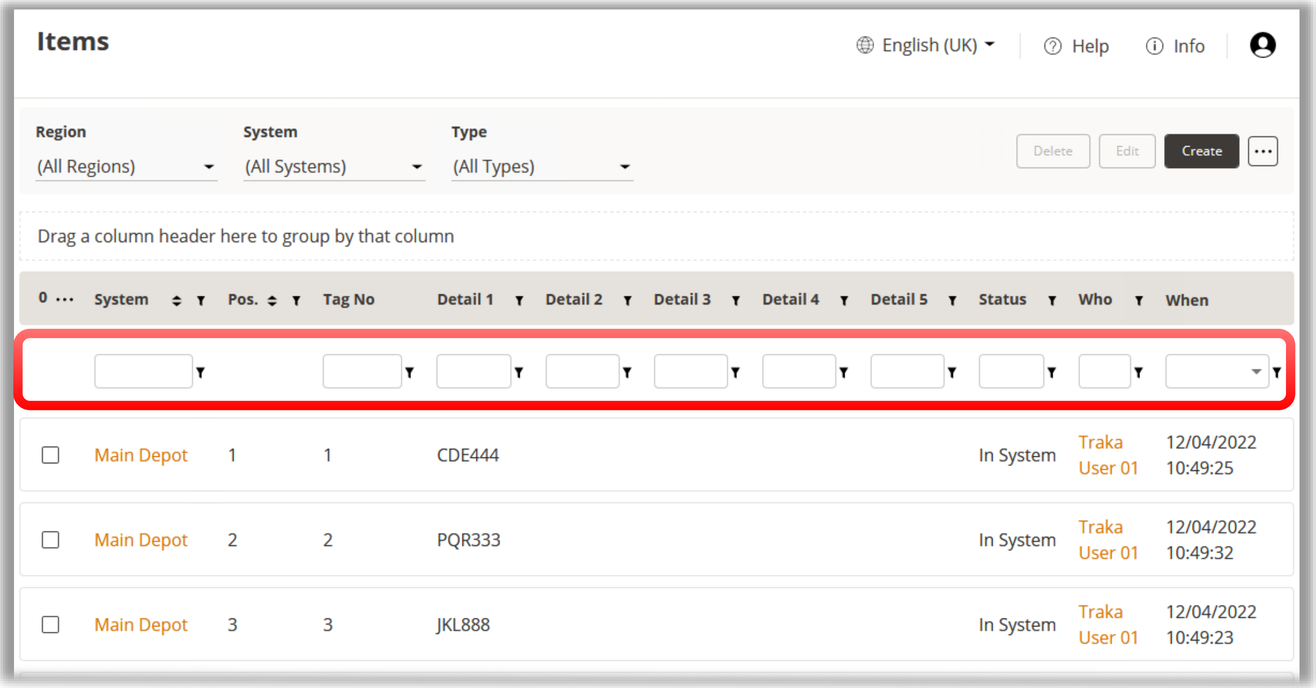
1. From the Navigation Menu, select **Items** and then **Items** again.



The Items page will show a list of details for all iFobs/Items in each available System.

2. From the **Ellipsis** menu on the Toolbar, select the **Search For** option.

A new line of search fields will appear on top of the table. You can now enter search details for each column in the grid, and e.g., search for an Item by its Tag Number.

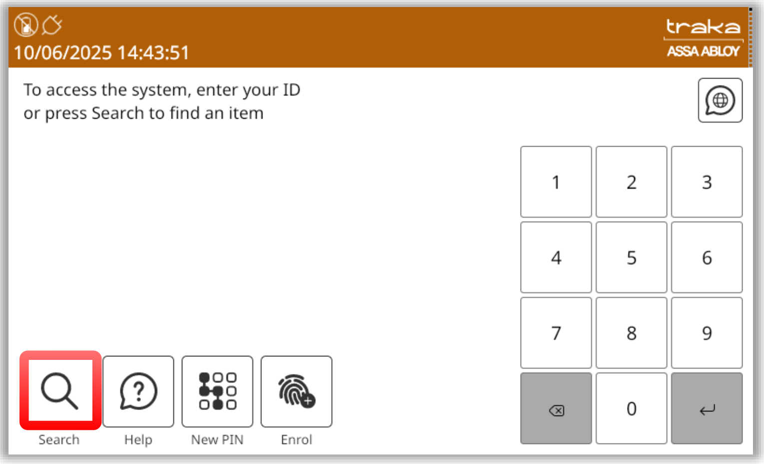


If you also drag and drop column headers into the field above the table, all the available Items will be divided into groups depending on your selection criterion. To read more on that functionality, please refer to the Grids section in this document.

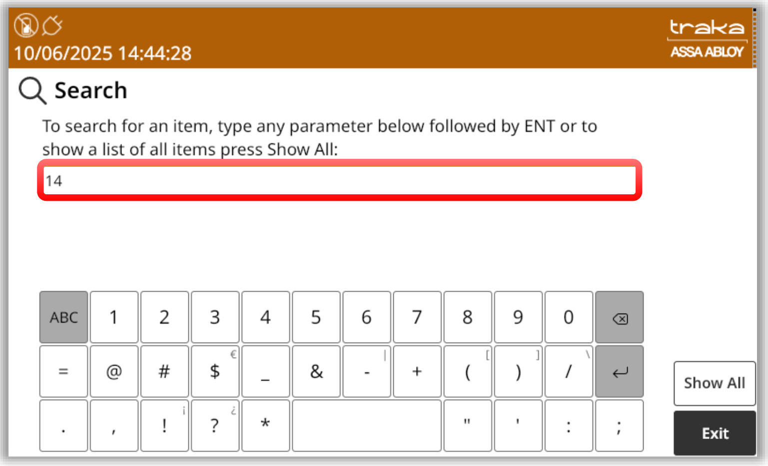
6.10.9 TRAKA TOUCH – SEARCHING FOR IFOBS

Locating Items in Traka Touch can be done using the Search function.

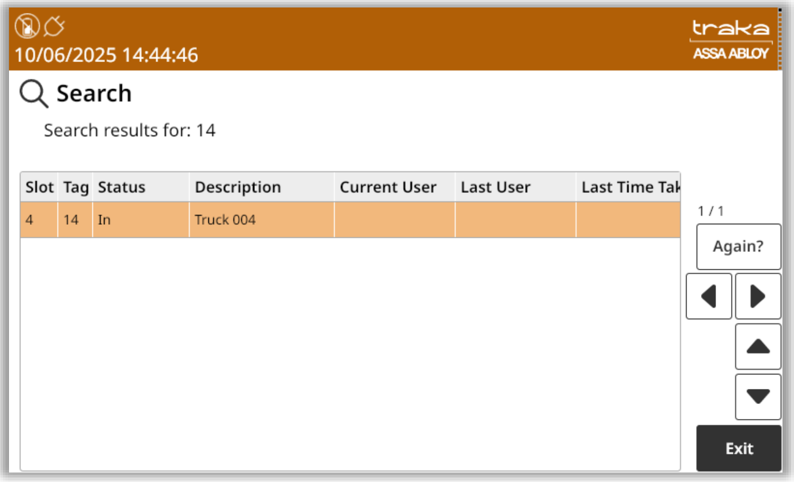
1. Tap **Search** on the Touch screen.



2. At the Search screen, enter the details for the Item you wish, and press **Enter** to locate, or tap on **Show All** to see all iFobs currently stored in the system.



3. Depending on your choice of search option, the next screen will display a list of results.

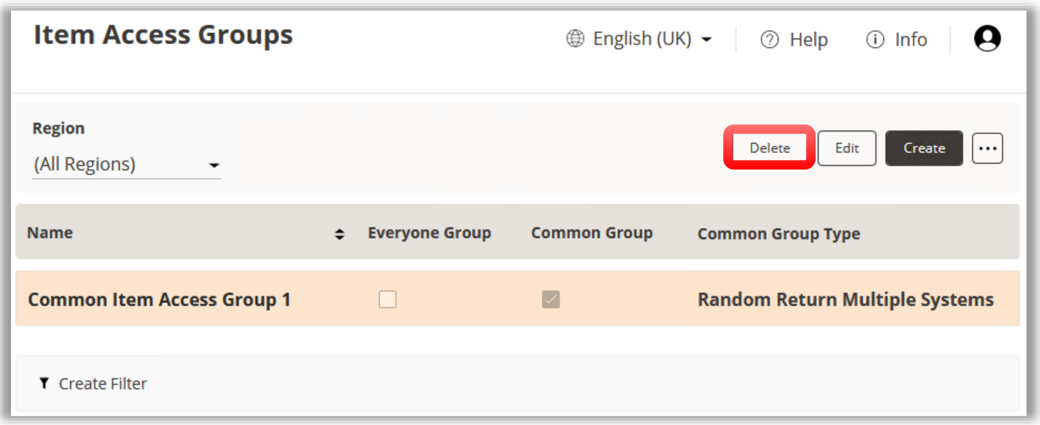


6.10.10 DELETE COMMON ITEM ACCESS GROUPS

Other than creating and editing Common Item Access Groups, it may also be necessary to delete them if they are not required.

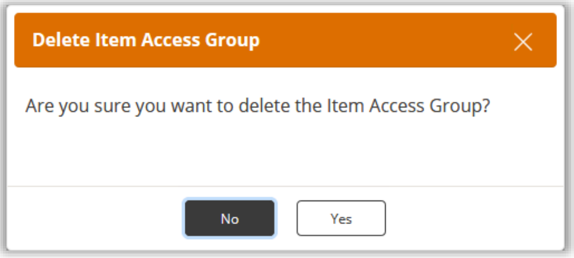
1. Navigate to the **Item Access Groups** from the Navigation Menu.

2. Select the Common Item Access Group you wish to delete and click on the **Delete** button.

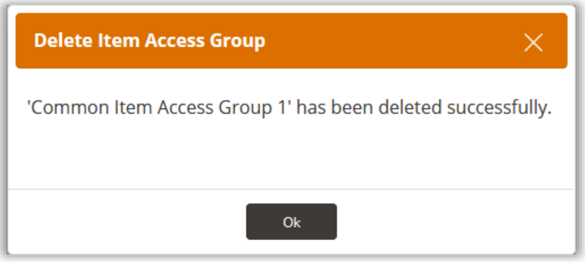


A new window will open where you will be asked to confirm that you want to delete the selected Item Access Group.

3. Click on **Yes** to continue.

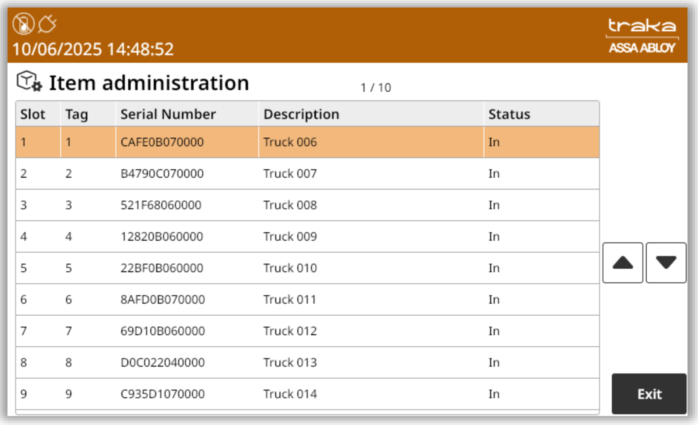


4. As soon as the Common Item Access Group has been deleted, a window with a confirmation will open. Click on OK to continue.



6.10.11 ITEM SETUP

With RRMS enabled, there is no requirement for Item Setup within Traka Touch. The Item Administration screen will provide a record of all the iFobs currently in the system.

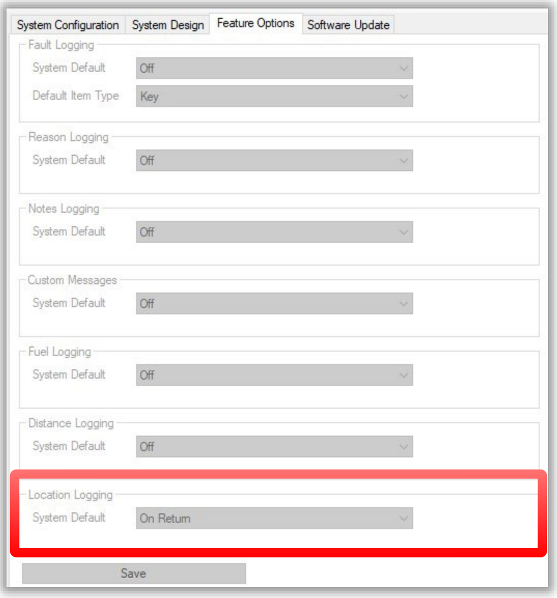


6.10.12 RRMS & LOCATION LOGGING

The option is now available to utilise the Location Logging cost-option feature to capture the location of a vehicle using RRMS. The feature works the same way as Fixed Return Location Logging where a user can search for the key at the cabinet and also display the location upon key removal.

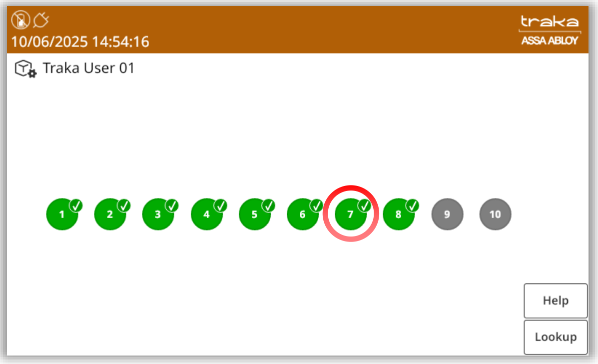
For more information on setting up and using Location Logging, please refer to the **Fuel, Distance & Location Logging** section of this document.

Once the config has been loaded on to multiple systems, the option will be shown as **On Return** and viewed as read-only within the Feature Options tab in TrakaWEB Admin. It cannot be changed in the Admin App or in TrakaWEB.



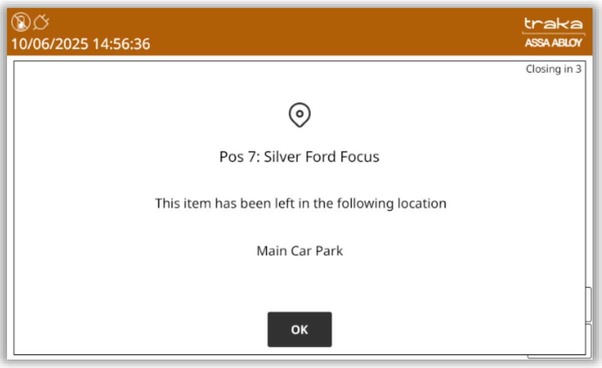
6.10.12.1 USING RRMS & LOCATION LOGGING

1. Once setup has been completed, log into a system as a non-admin user and select the required available item.



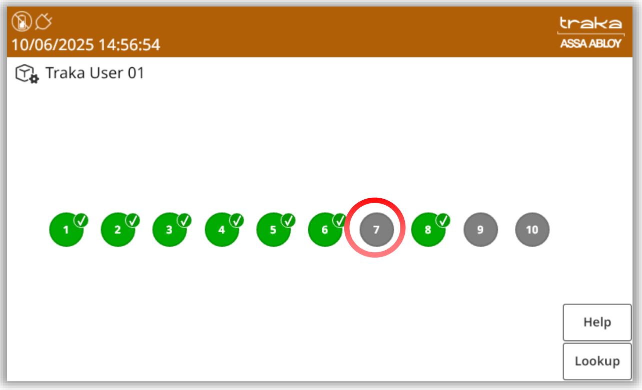
RRMS System #1

The system will display the vehicle location for the selected iFob.



RRMS System #1

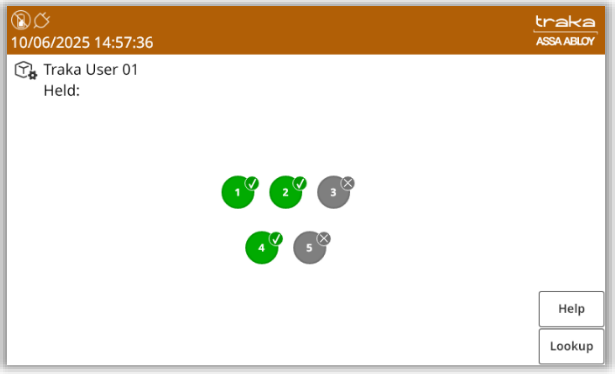
2. Select **OK**, and the iFob will be released.



RRMS System #1

3. Close the door and you will be logged out.

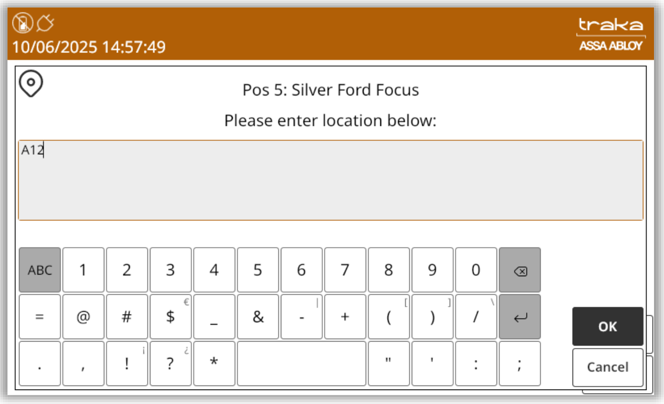
4. As a non-admin user, log into a different RRMS system.



RRMS System#2

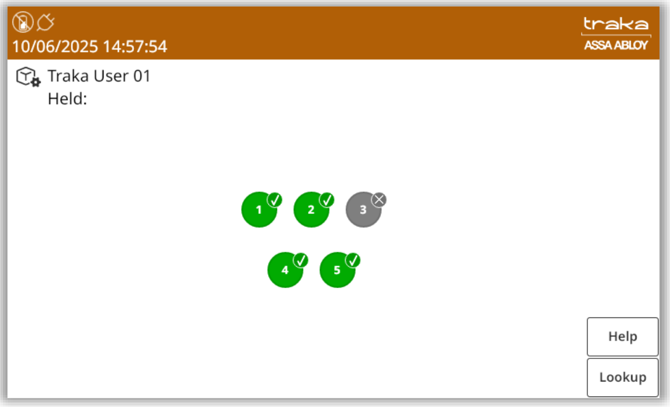
5. Insert the iFob in your possession into an available slot.

The system will prompt you to enter a location for the vehicle.



RRMS System#2

6. Once you have entered the new location, select **OK**.



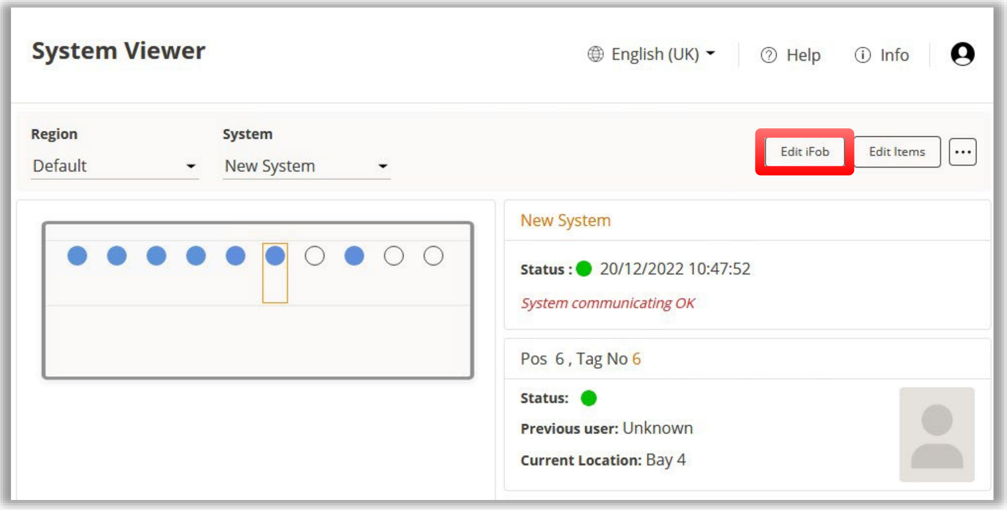
RRMS System#2

7. Close the door and you will be logged out of the system.

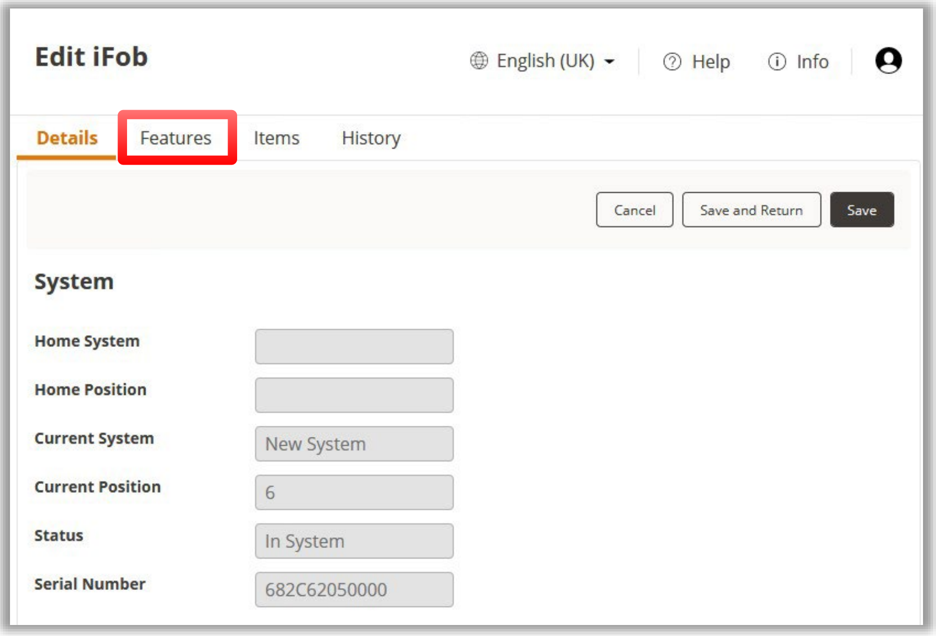
6.10.12.2 OVERRIDE LOCATION LOGGING IN TAKAWEB

It may become necessary for an administrator to override an incorrect Location Logging if for example, the location of the vehicle is different to what has been entered at the system.

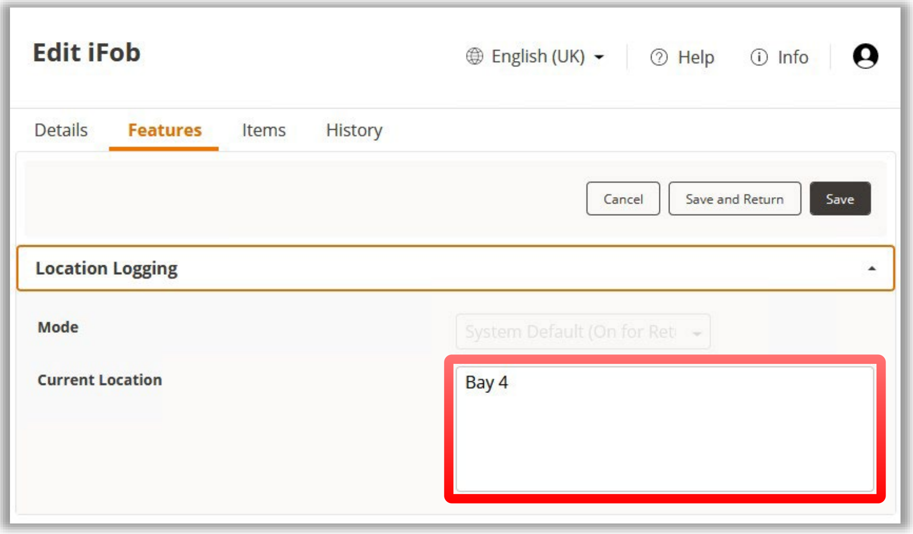
1. In the system viewer, select the item that requires editing and then click on **Edit iFob.**



2. At the **Edit iFob** screen, click the **Features** tab.



At the next page, you can manually edit the items' current location.



3. Once complete, click on **Save and Return.**

NOTE: It is not possible to override the Current Location with Traka Touch.

6.11 TEMPORARY KEY STORE (TKS)

Temporary Key Store is a cost option feature that will allow a user to temporarily deposit their keys into a different system to that which the keys were removed from.

The Temporary Key Store system may be used in a situation where taking keys is against compliance such as outside of work premises or areas considered to be of high risk. In conditions such as these, the keys may be placed in the Temporary Key Store system to keep track of their location and retrieved later as required.

An override option can be assigned to a user in TrakaWEB, which will enable them to remove iFobs from the Temporary Key Store regardless of them being granted access. This will generate a 'Temporary Key Store Override' event which will appear in the activity report. However, Realtime Activity will not show any 'Temporary Key Store Override' events unless activated from Activity Types in the Software Settings menu. An 'Activity Trigger' can also be set within TrakaWEB to generate an Email Notification.

Due to the nature of the Temporary Key Store functionality, there is no Search option available on Traka Touch.

NOTE: This feature will be available on Linux systems running future versions of the Traka Touch Application.

6.11.1 LIMITATIONS

The Temporary Key Store feature is **compatible** with the following:

- Key Management Systems
- Random Return to Multiple Systems
- Remote Commands (Remote Release and Remote User Login)
- Email Notifications (Temporary Key Store Override event)
- Extension Cabinets

The Temporary Key Store is **not compatible** with the following (Excluding home system setup):

- Lockers
- Rack Manager
- Random Return Single System (RRSS)
- Fixed Return to Single System (FRSS)
- Item Booking
- Access Schedules
- Allowance Across Systems
- Reason Logging
- Notes Logging
- Fault Logging
- Fuel, Distance, and Location Logging
- Item Handover
- Custom Messages
- Curfews

- [Authorisers]
- iFob Authorisation
- User & Item Import Spreadsheet on Touch
- Individual Item Allowances
- Integration Engine

6.11.2 PREREQUISITES

A configuration file will be required to enable RRMS and TKS, which can be obtained from Traka. To load the configuration file, please refer to **UD0011 – Traka Touch User Guide**.

Although the iFob home system may be a Fixed Return system, the Temporary Key Store is based on Random Return to allow iFobs to be returned and retrieved from any position.

Please refer to the Random Return to Multiple Systems section of this document for more information on the setup and configuration of RRMS.

6.11.3 USING TEMPORARY KEY STORE

A user will be able to deposit multiple items that they have been granted access into the Temporary Key Store. By using the I Know What I Want functionality on Traka Touch, they will in return be able to remove those items as required.

Only the user who deposited the items to the Temporary Key Store may be able to remove them unless they have been granted the override permission. In this situation, an override event will be generated.

Due to the nature of the Temporary Key Store/RRMS, there is no Search functionality available.

Items are taken from the home system as required, by a user who has been granted access to them.

If a User with the Admin role accesses the TKS system, they will be presented with the option to either enter the Admin menu or deposit and remove items by selecting the **I Know What I Want** button.

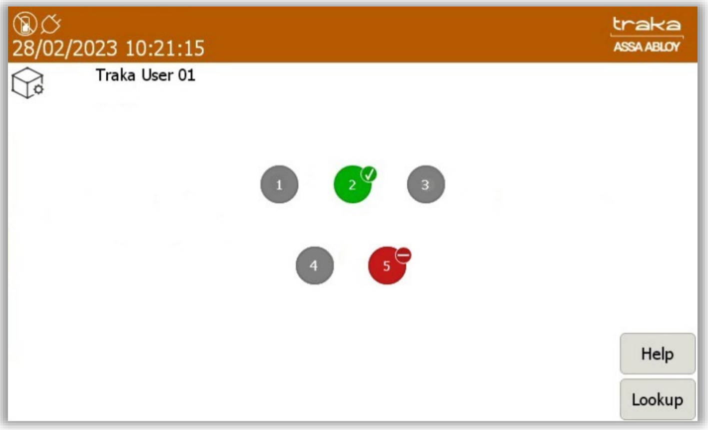
When a non-Admin User logs into the system, the door will automatically open to allow them to deposit or remove items.

1. After logging in as an Admin User, access the system by selecting the **I Know What I Want** button.

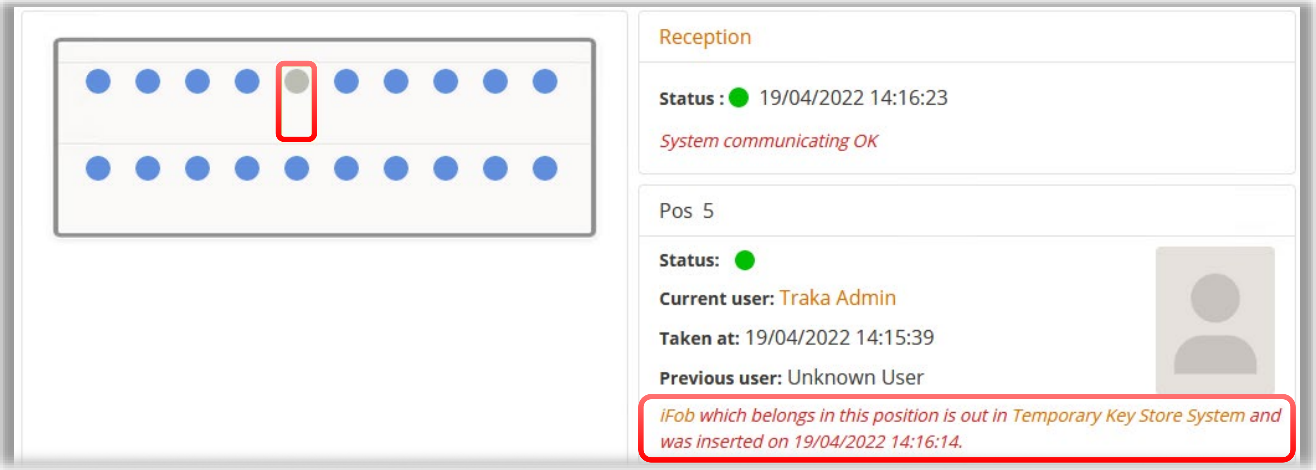
   The door will now open, and you can then place the iFob in the system.

2. Place the iFob in any available slot and then close the door. The system will automatically log you out.

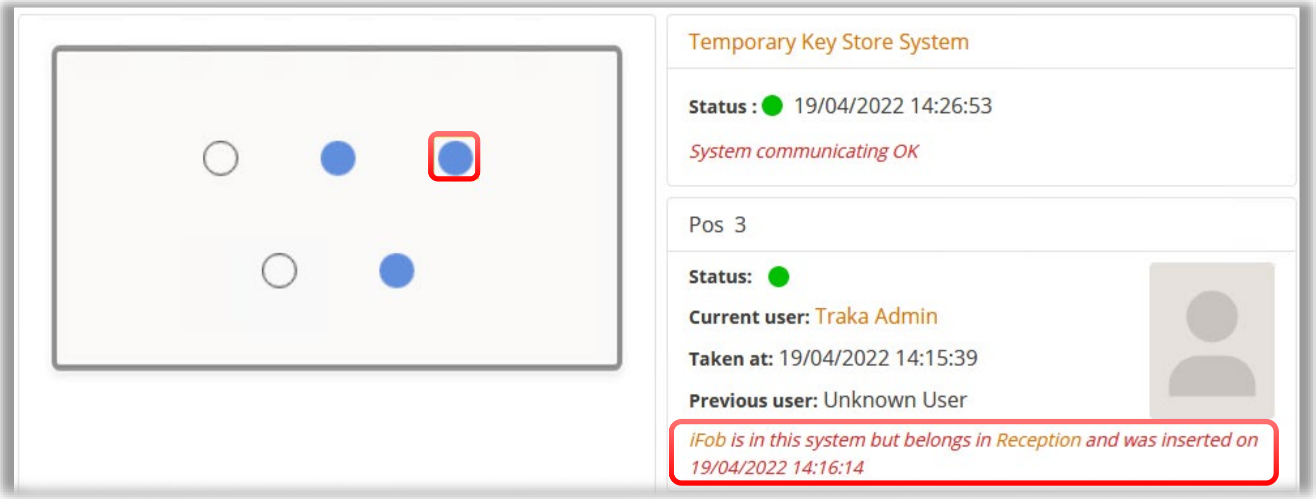
When a user returns to the system to remove items, they will only be allowed to take items that they originally deposited. Items in red represent Items that have been deposited by other users. This rule will apply to all users unless they have been given the override permission.



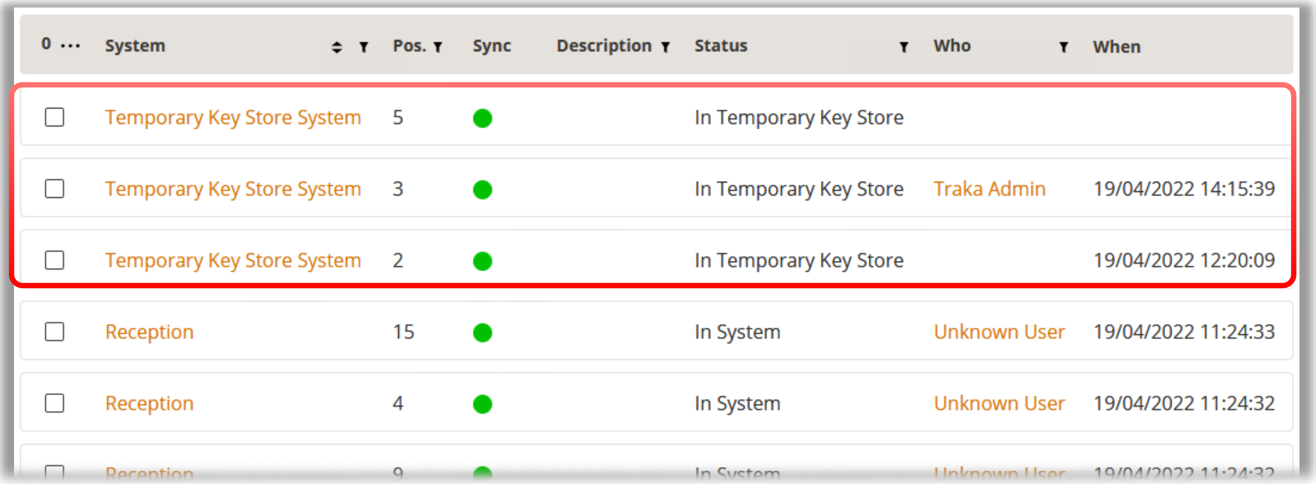
A record of removed items is viewable from the home system when an item that has been removed is selected in the System Viewer. A message will be displayed as shown below.



A record of items placed in the Temporary Key Store system can be viewed by selecting a deposited item on the **System Viewer** page.



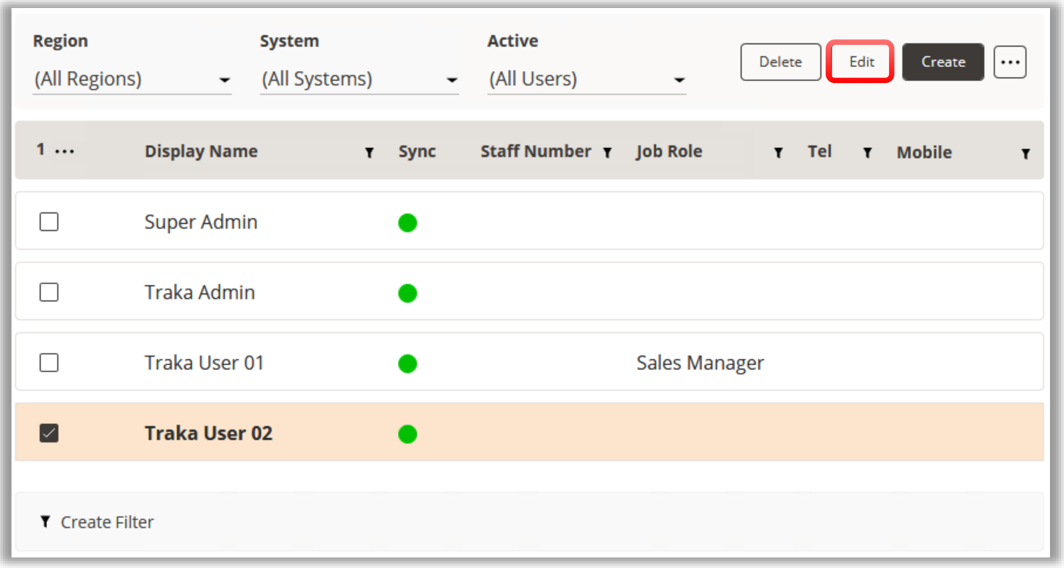
Selecting the **iFobs** from the Navigation Menu will also provide information as to which iFobs are currently out of the system and their location in the Temporary Key Store.



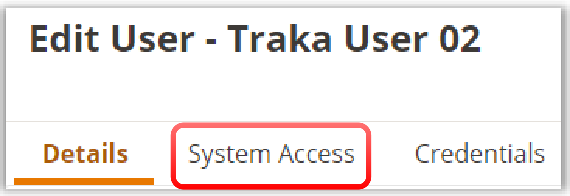
6.11.4 TEMPORARY KEY STORE OVERRIDE

A User with the Temporary Key Store Override function will be able to remove items from the Temporary Key Store system even if they have not been granted access to those items.

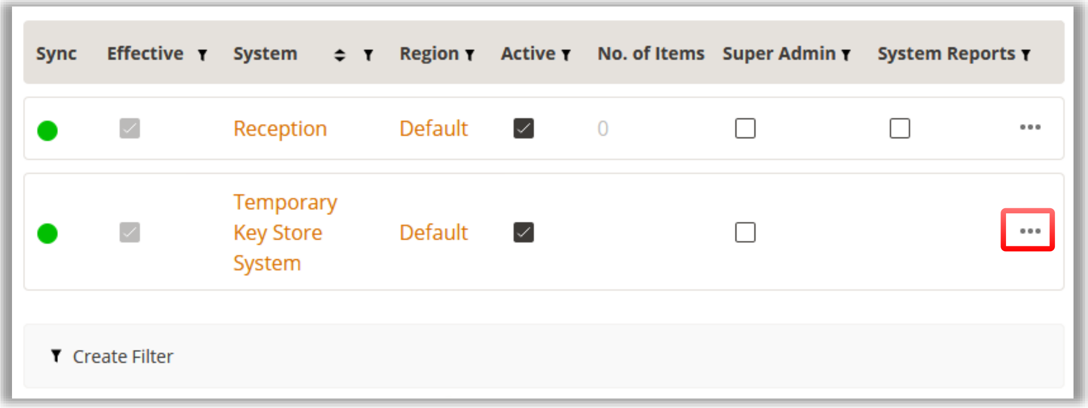
1. From the Navigation Menu, navigate to the **Users** page, select a User and then choose **Edit**.



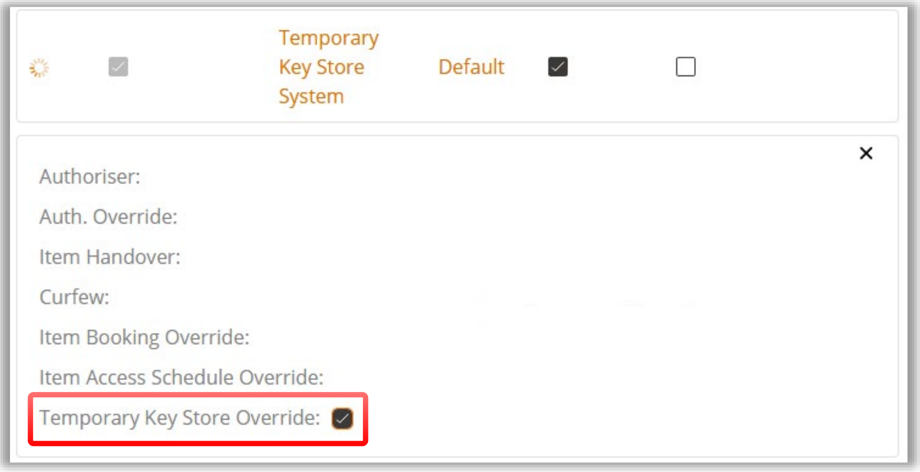
2. At the **Edit User** page, select the **System Access** tab.



3. At the **System Access** page, find the Temporary Key Store system in which you want the user to have Key Store Override permissions and click on the Ellipsis button to the right of that system.



4. A new panel will open. Find and tick in the checkbox for **Temporary Key Store Override.**

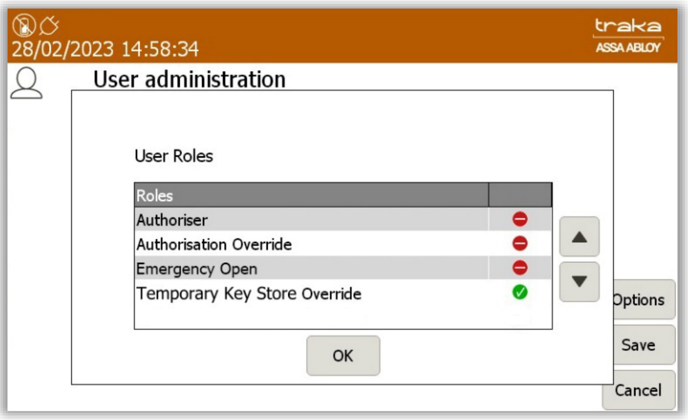


NOTE: The override option is only available for systems configured for Temporary Key Store. It will not allow users to remove items that they have not been granted access to from non-Temporary Key Store systems.

5. Once completed, click on **Save and Return**.

The selected User will now have permission to remove any items from the Temporary Key Store as required.

Although the Temporary Key Store Override permission cannot be set at the Traka Touch system, any override permissions a user has been given can be viewed in Roles within User Administration at the Temporary Key Store system.

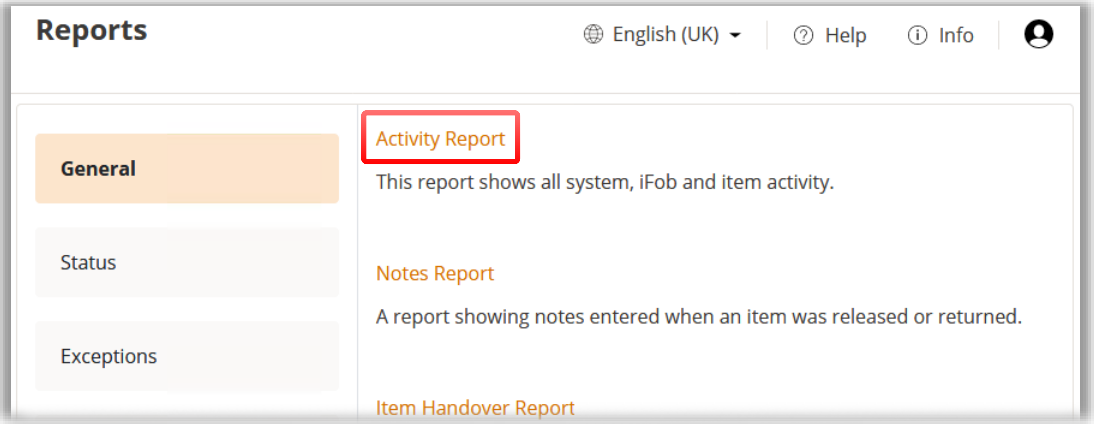


6.11.5 REPORTS

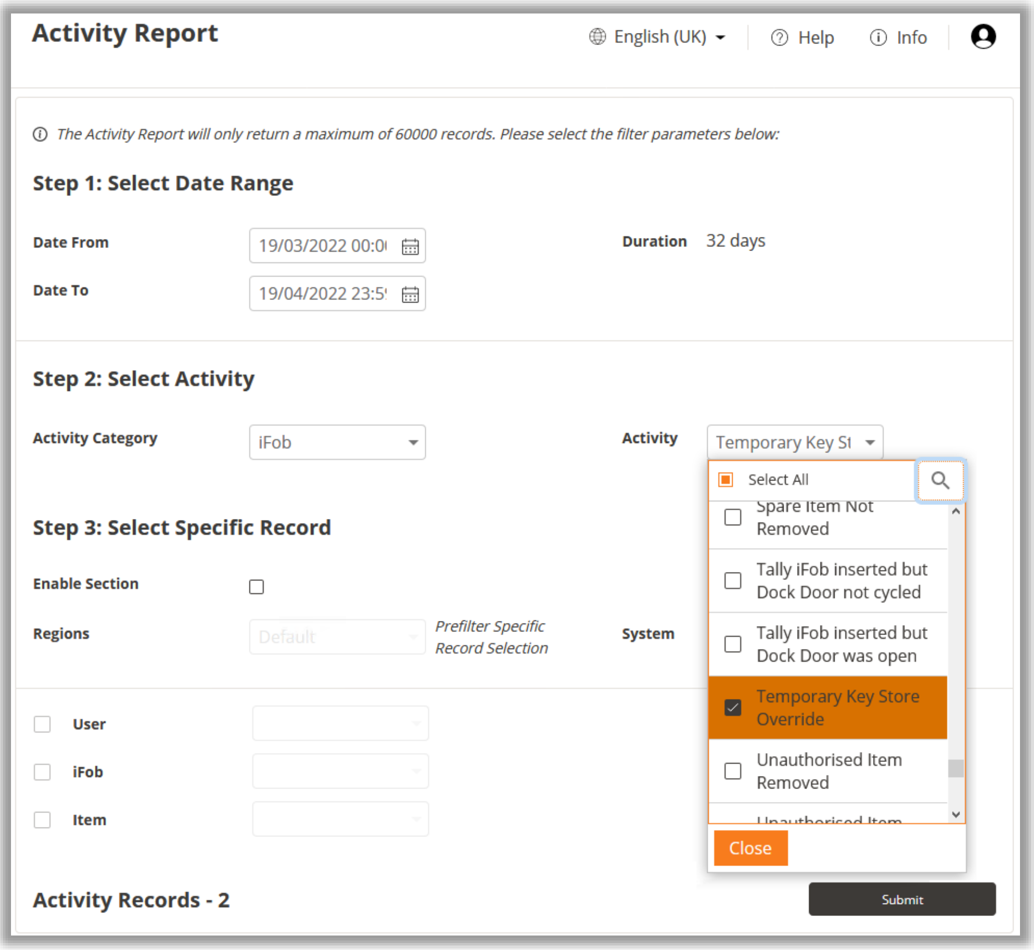
6.11.5.1 TEMPORARY KEY STORE ACTIVITY REPORT

Any time that the Temporary Key Store Override permission is used, a recorded event is generated. The activity can be selected when creating an Activity Report.

1. Within the View Reports menu, in the **General** tab, select an **Activity Report**.

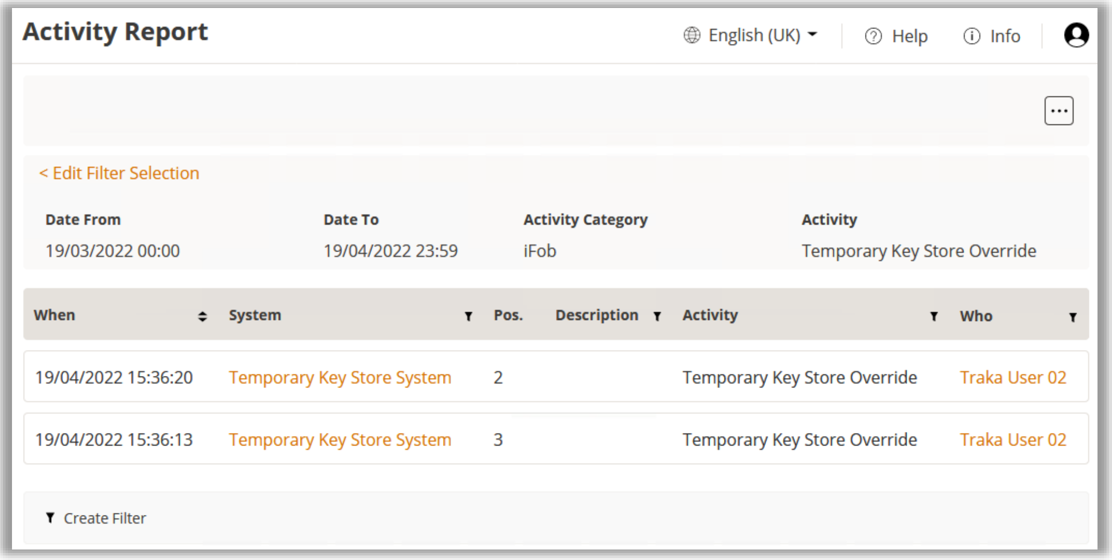


2. On the filter page, select iFob as the **Activity Category** and navigate through the **Activity** drop-down menu as shown and place a tick in the checkbox for **Temporary Key Store Override.**



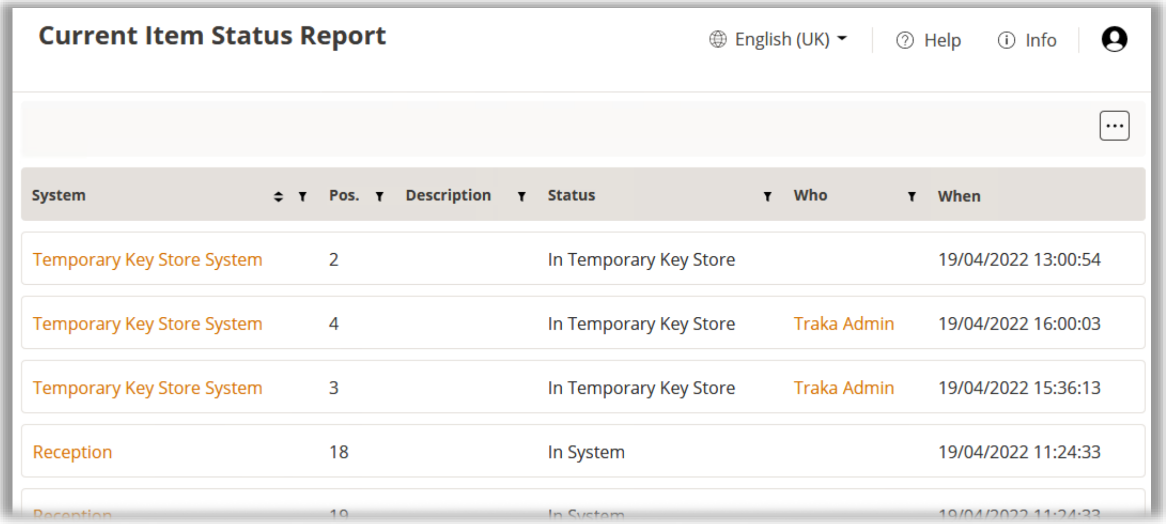
3. After completing the filter parameters for the report, click on the **Submit** button.

The report for Temporary Key Store and any other filtered parameters will then be shown.



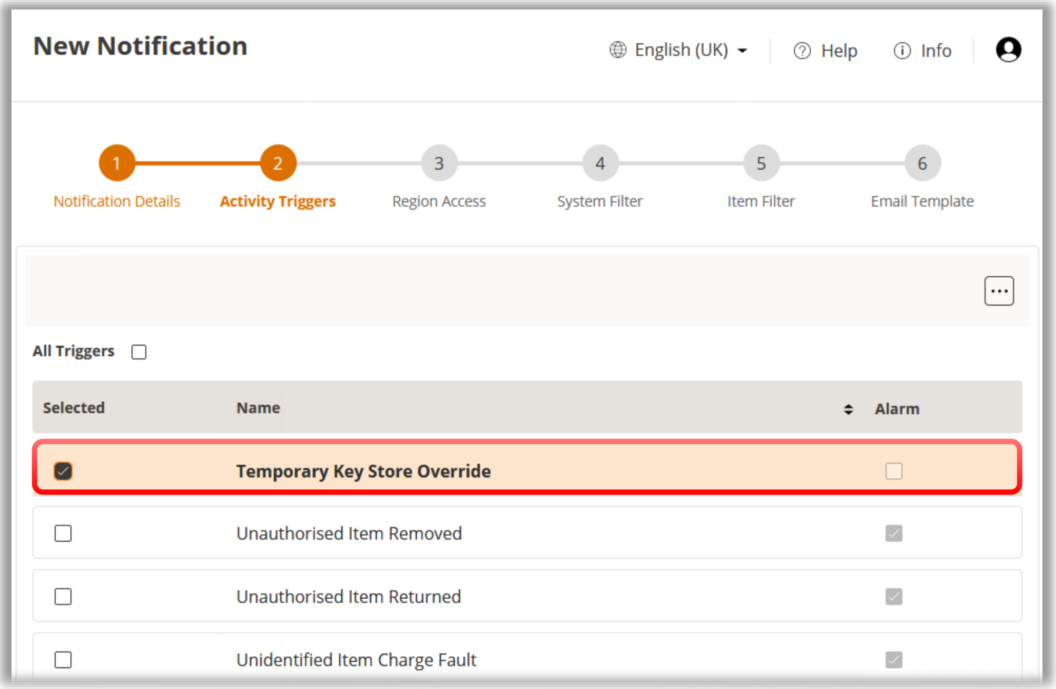
6.11.5.2 CURRENT ITEM STATUS REPORT

A **Current Item Status Report** may be accessed in the View Reports menu by selecting the **Status** tab.



6.11.6 EMAIL NOTIFICATIONS

A Trigger Event can be used to send an email notification when the Temporary Key Store Override option is used. For more information on email notification configuration, please refer to the Email Notifications section in this document.



6.12 ITEM PAIRING & LOCKER PAIRING

Item Pairing and Locker Pairing are powerful security features which can prevent users from taking too many critical keys or assets from Traka Touch systems simultaneously or prevent the removal of keys or assets when it is not safe to use them.

6.12.1 ITEM PAIRING: FRSS OR ADVANCED FIFO

Item Pairing allows the TrakaWEB administrator to arrange Items in pairs or groups. Moreover, you can decide how the paired items will behave. Item Pairing can be arranged in accordance with either of the two different rule types and you will need to choose which rule type is more appropriate for your chosen items:

Exclusive User Pairing	Lockout Pairing
• You can create pairs of items • Each pair will have one Primary item and one Secondary item • When you remove one paired item from the system, you will not be able to remove the second • When you have one item from the pair out of the system, a different user can remove the other one	• You can create groups of items • Each group will consist of one or more Primary items and one Secondary item • When at least one Primary item is out of the system, no user can remove the Secondary item • All the Primary items must be back in the system before the Secondary item can be removed • When the Secondary item is out of the system, no user can remove any of the Primary items

To demonstrate the power and potential application of the Item Pairing feature, consider the following examples:

- **Exclusive User Pairing:** A company has a security safe and two associated keys (the primary key and the spare) stored in a Traka Touch system. The feature will prevent an authorised user from taking both keys at once. One user can only take one key at a time, and they must return the first key to remove the other. Other users can remove the spare in the meantime, as they might need access to the safe as well
- **Lockout Pairing:** A company has an engine room and a number of electrical boxes in the engine room. There is one main engine key (the Secondary key) and a number of keys to different electrical boxes (Primary keys). The feature will prevent different users from removing the main engine key until all the keys to the electrical boxes have been returned. Conversely, when the main engine key is out of the system, no user will be able to remove any keys to the electrical boxes to prevent any damage to the equipment or harm to the personnel.

NOTE: You can set up as many rules per system as you can have possible item pairings, and one system can work with multiple rules of both types enabled on it.

NOTE: One item can only be assigned to one rule.

Item Pairing can be used on Touch systems working in 2 mutually exclusive modes:

1. It can be set up on systems working in the Fixed Return to Single System (FRSS) mode OR
2. It can be set up on systems working in the Advanced First In-First Out (AFIFO) mode.

Should you require a change to your chosen configuration, please contact Traka or your Distributor.

6.12.1.1 LIMITATIONS

Due to the nature of the Item Pairing feature, it is incompatible with the following features on TrakaWEB/Traka Touch:

- Random Return to Single System (RRSS)
- Random Return to Multiple Systems (RRMS)
- Temporary Key Store (TKS)
- DockSafe
- Rack Manager

6.12.1.2 ENABLE ITEM PAIRING

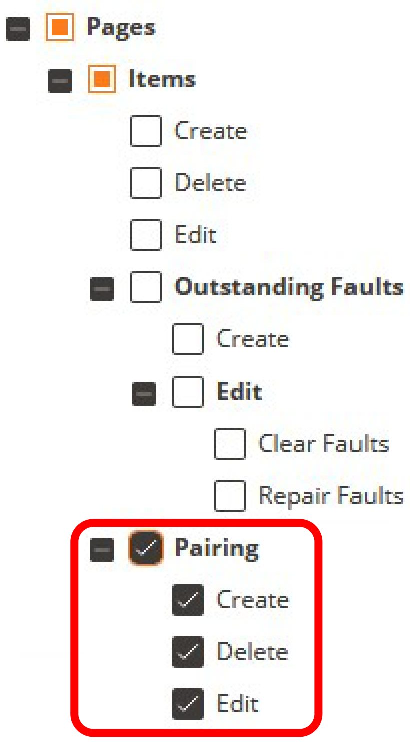
To enable Item Pairing on TrakaWEB, at least one of the systems connected to TrakaWEB must be configured to work with the Item Pairing function enabled. To enable Item Pairing for a specific system, you will need to upload an appropriate Config file onto that system.

You will need to decide whether the Item Pairing will be enabled on a FRSS system or a system working in the Advanced FIFO mode as your decision will affect which Config file will need to be uploaded on the affected system(s). To read more about Advanced FIFO, refer to **UD0232 – TrakaWEB FIFO and Advanced FIFO User Guide**.

To obtain the relevant Config files with the Item Pairing enabled for your systems, contact Traka or your Distributor.

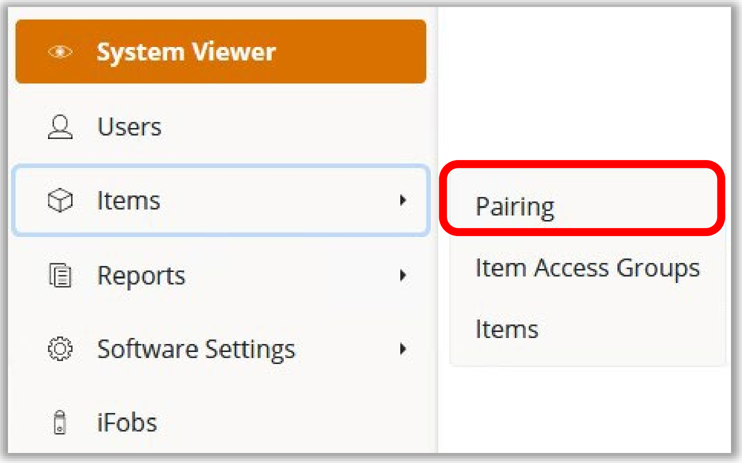
6.12.1.3 ITEM PAIRING SOFTWARE PERMISSIONS

As a TrakaWEB administrator, you may or may not have the necessary permissions to create, edit, or delete Item Pairing rules. To check if your Software Permissions Group has got appropriate permissions, make sure that the following checkboxes relating to the Item Pairing are ticked in the Edit options of your Software Permissions Group. The Item Pairing permissions can be found in the software permissions tree under **Web > Pages > Items > Pairing:**

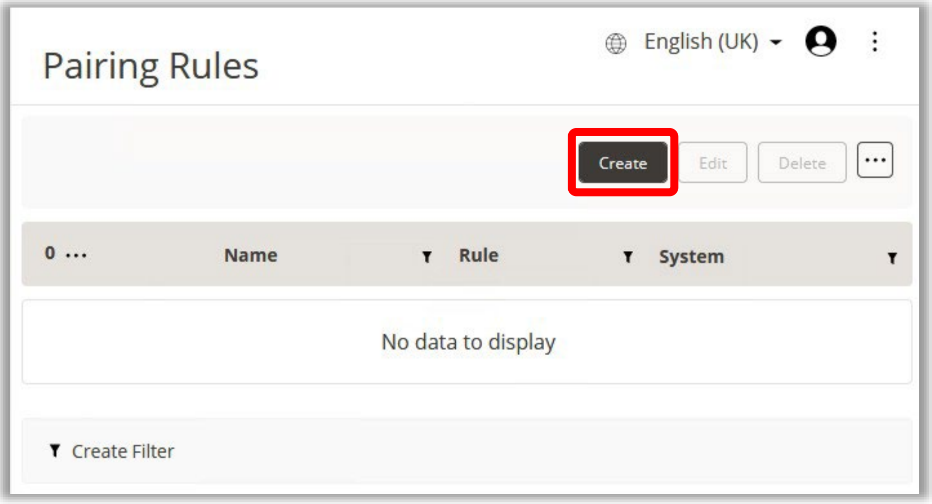


6.12.1.4 CREATE AN ITEM PAIRING RULE

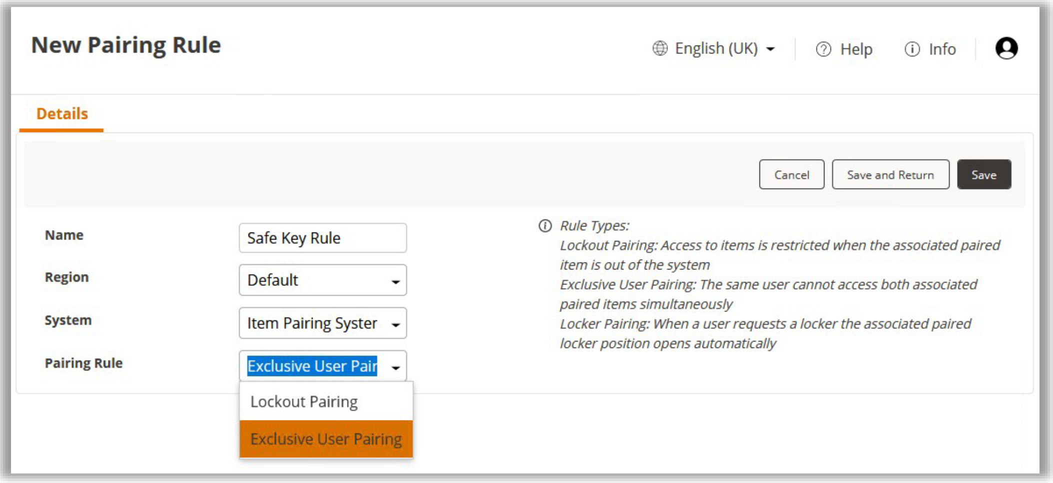
1. To create an Item Pairing rule, select **Items** on the Navigation Menu. The menu will expand and reveal the **Pairing** sub-menu:



2. TrakaWEB will then display all the current Item Pairing rules that exist within the database. Click on the **Create** button on the Toolbar.



3. You will be taken to a new page, where you will need to provide a name for the new rule, and then subsequently select the Region and the System which will be affected by the new rule, as well as select the Pairing Rule Type that you need to create.



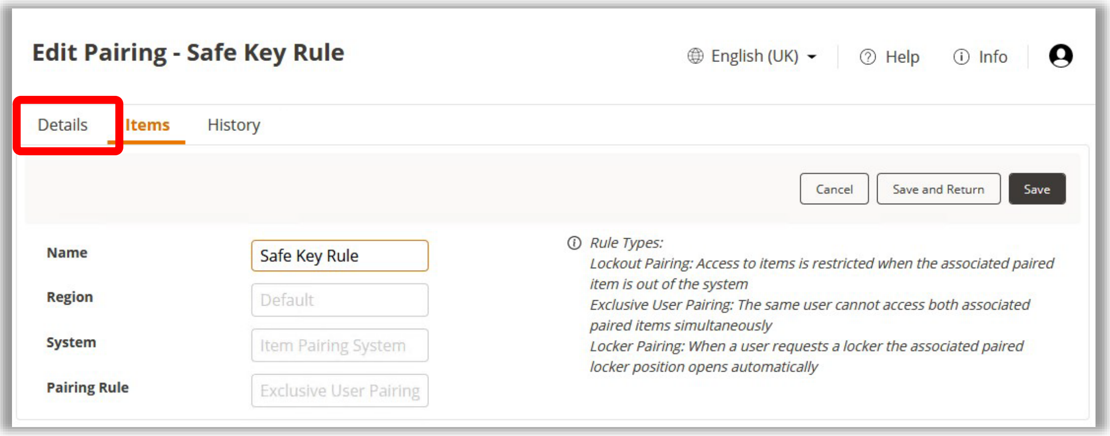
To decide which rule you should create, refer to the Item Pairing Overview section in this document.

4. Once you have made your selection, click on **Save**.

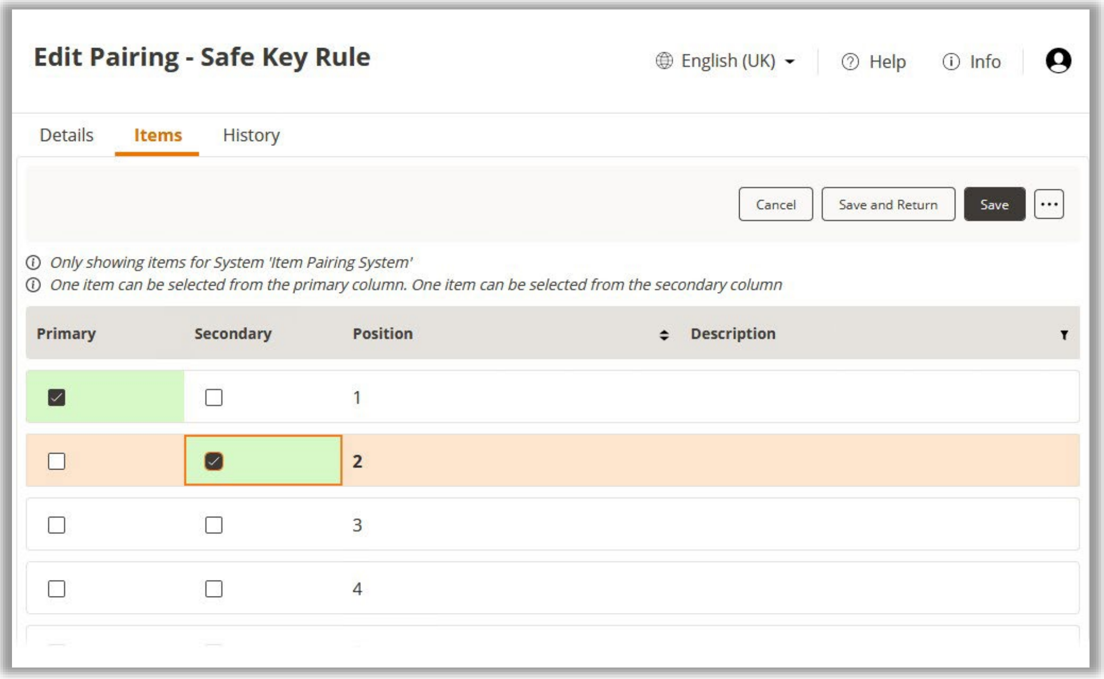
NOTE: Once you have created the rule, you will not be able to change its selected Region, System, or Pairing Rule Type. If that is the case, you will need to delete the rule and create a new one instead.

The page will now update, and your selected Region, System, and Pairing Rule Type will be greyed out. You will also gain access to two new tabs: Items and History.

5. Select the **Items** tab.



6. Depending on the Item Pairing Rule you have chosen previously, select your Primary and Secondary Items by checking the boxes in the relevant columns next to the respective Items' positions.

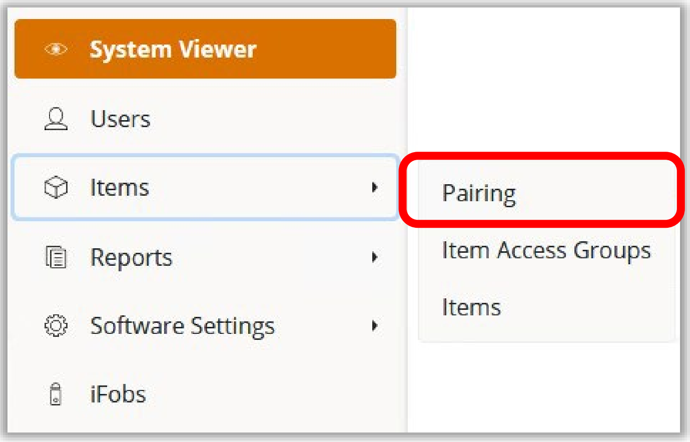


NOTE: In the Exclusive User Pairing, you may select only one Primary and one Secondary. In the Lockout Pairing, you may select multiple Primaries and one Secondary.

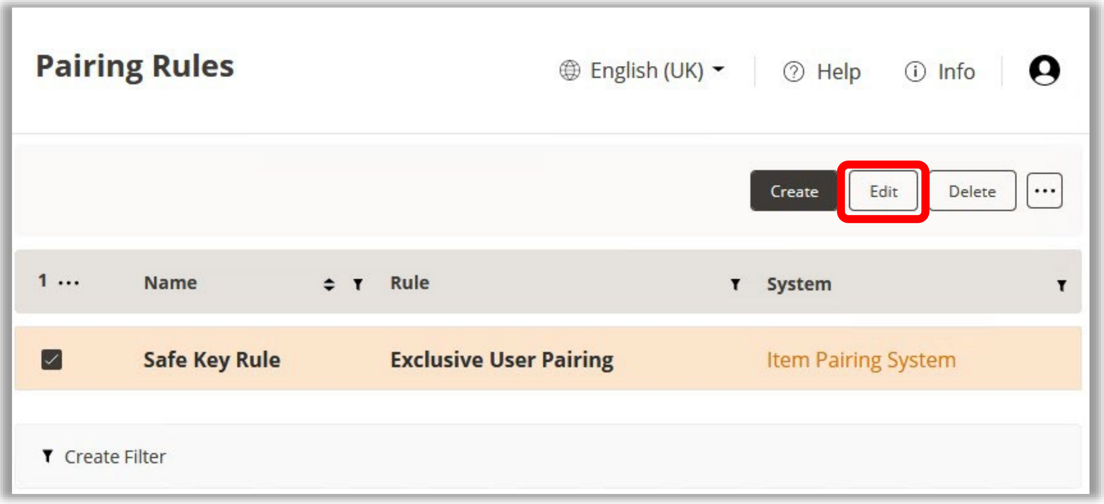
7. Once you have chosen your Items for the Item Pairing Rule, you can click on **Save and Return**.

6.12.1.5 EDIT AN ITEM PAIRING RULE

1. To edit an Item Pairing rule, select **Items** on the Navigation Menu. The menu will expand and display the **Pairing** option.



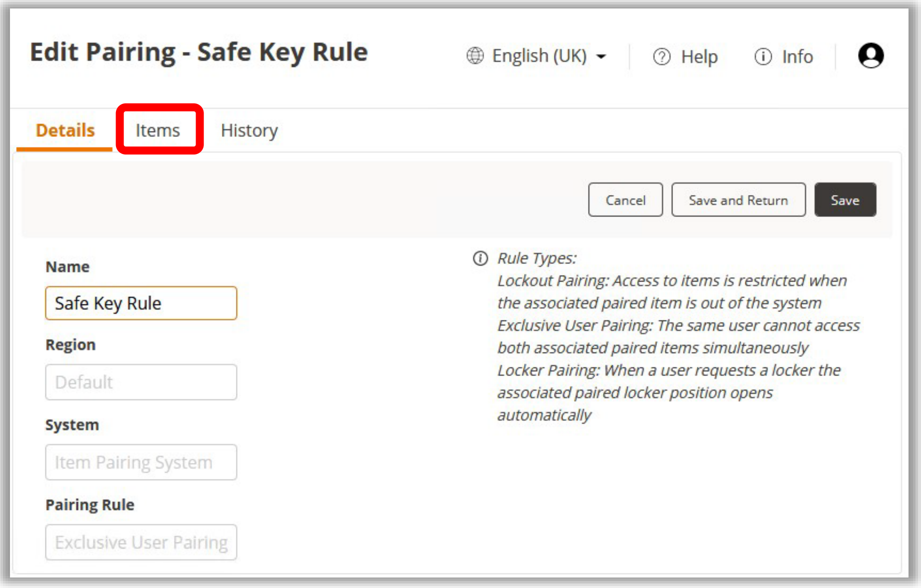
2. TrakaWEB will then display all the current Item Pairing rules that exist within the database. Select one of the existing Item Pairing rules and either click on **Edit** on the Toolbar or double-click on the selected rule to start editing it.



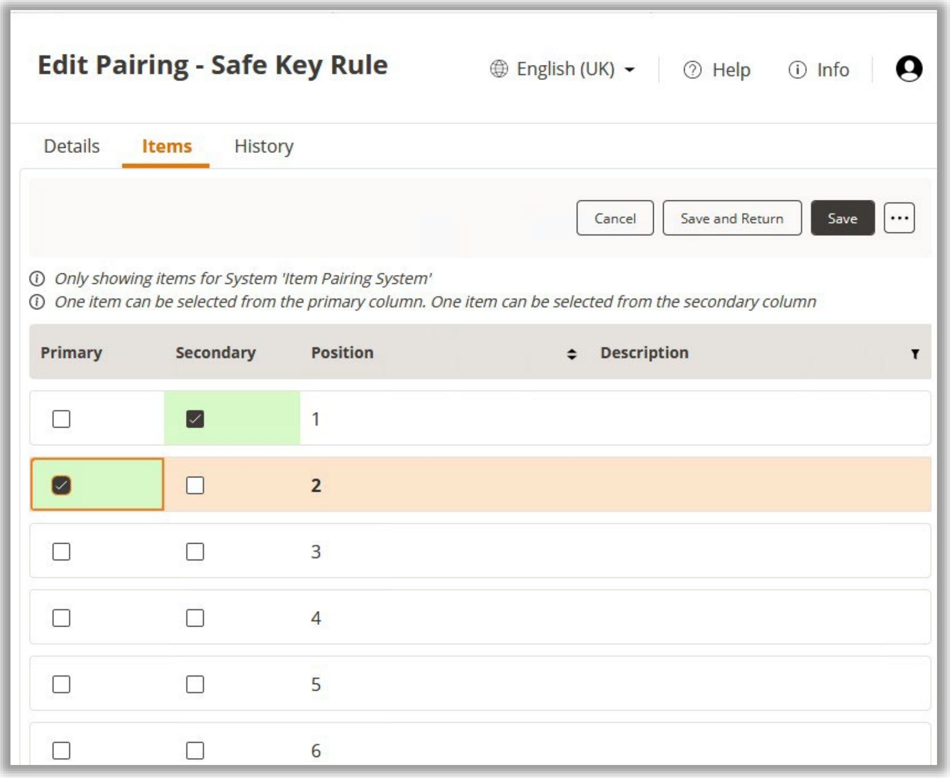
You will be redirected to the Edit Item Pairing rule **Details** page. You will notice that you cannot edit any of the Region, System, or Item Pairing Rule Type details.

NOTE: Once a rule has been created, you will not be able to change its selected Region, System, or Pairing Rule Type. If that is the case, you will need to delete the rule and create a new one instead.

3. Select the **Items** tab.



4. In the Items tab, change your selection of Primary and/or Secondary items in the Pairing Rule as required.

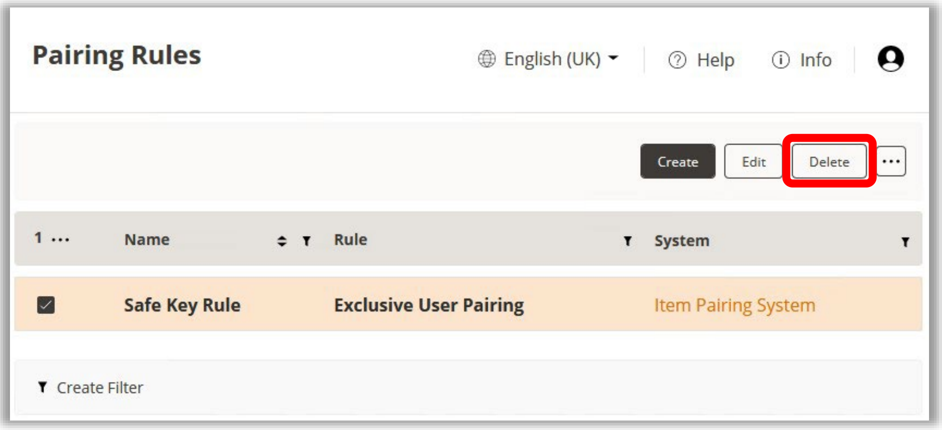


NOTE: In the Exclusive User Pairing Rule Type, you may select only one Primary and one Secondary. In the Lockout Pairing Rule Type, you may select multiple Primaries and one Secondary.

5. Click on **Save and Return**.

6.12.1.6 DELETE AN ITEM PAIRING RULE

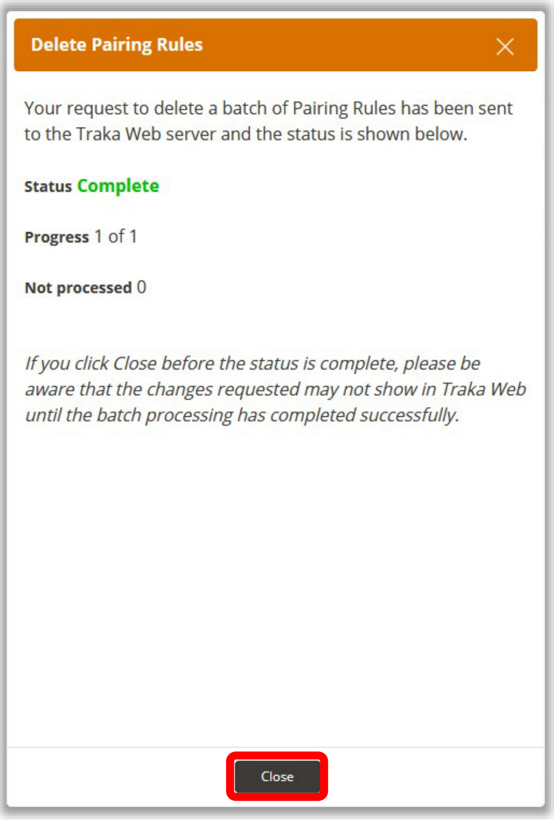
1. To delete an Item Pairing rule, navigate to the Pairing Rules page where all the current Item Pairing rules will be displayed.
2. Select one of the existing Item Pairing rules that you wish to delete and then click on the delete button on the Ribbon Menu.



A window will appear asking you to confirm that you wish to delete the selected Item Pairing Rule. Select **Yes** to continue.

The rule will now be deleted.

3. Click on close to exit from the window.



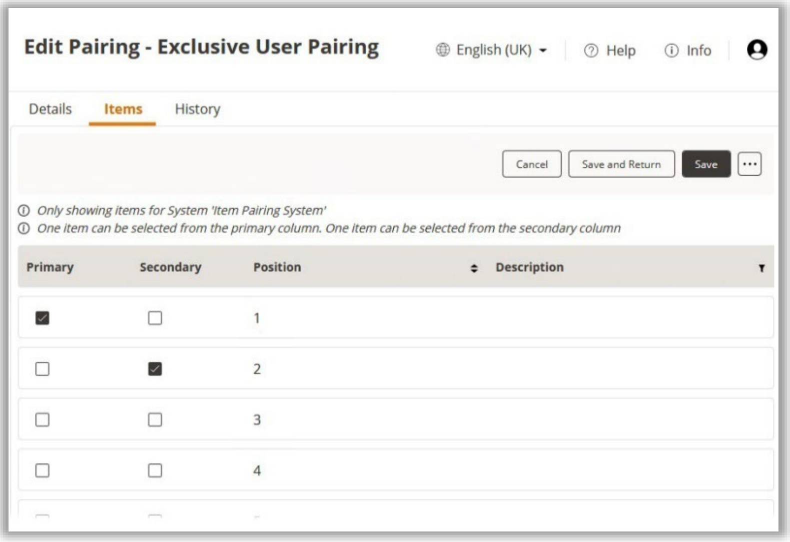
6.12.1.7 ITEM PAIRING ON FRSS SYSTEMS

When the Item Pairing feature is enabled on Fixed Return to Single System systems, the items associated with selected Item Pairing Rules are accessible at any time, provided that the Item Pairing Rule's conditions have been met and the user who is trying to access the items has been authorized to remove them from the affected system(s).

6.12.1.8 EXCLUSIVE USER PAIRING RULE

Setup

Once an Exclusive User Pairing Rule has been set in place in TrakaWEB, the feature will work on the selected system as soon as the synchronisation completes. In the example below, the following Exclusive User Pairing Rule has been created:

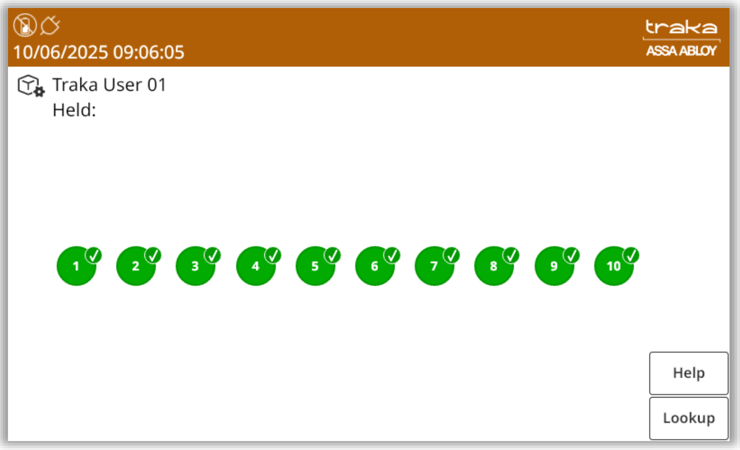


The item in Position 1 has been set as the Primary item, and the item in Position 2 has been set as the Secondary item.

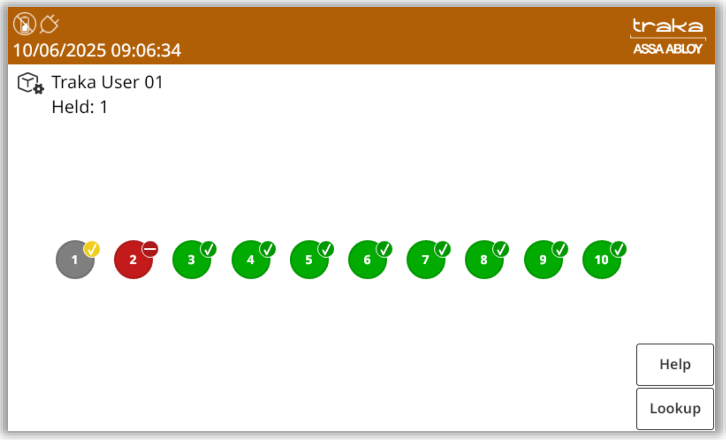
Two users are registered on the system: Traka User 01 who has access to all the items stored in the system, and Traka User 02, who only has access to the item in Position 1.

Application

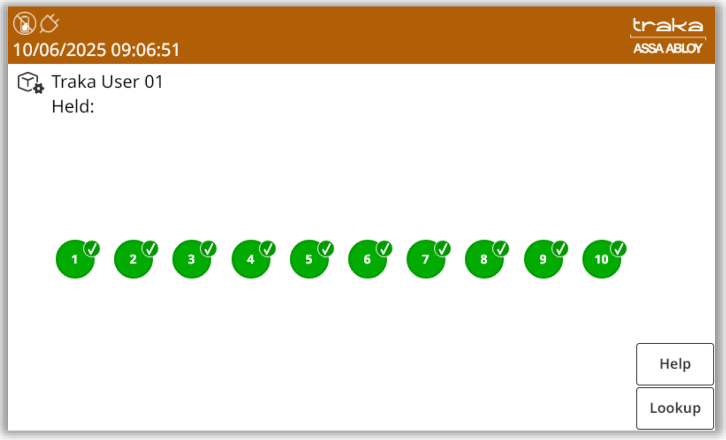
1. When Traka User 01 logs into the affected Traka Touch system, they can remove any item from it. In the example below, the item in Position 1 has been chosen.



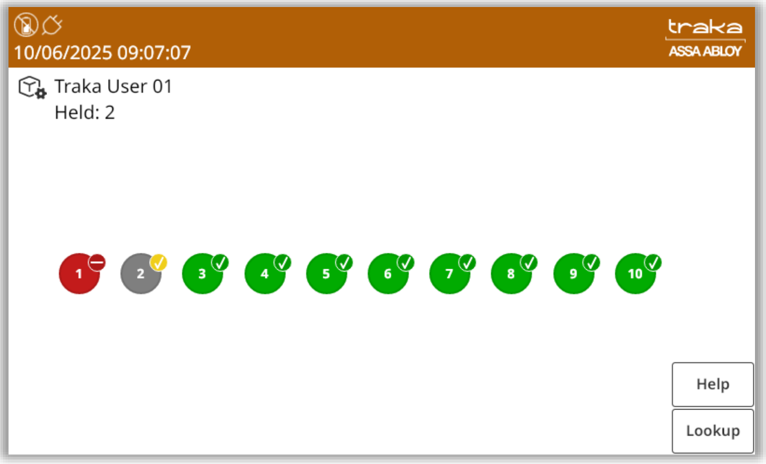
2. The moment they have taken the item from Position 1, which is the Primary item in the existing Item Pairing rule, the item in Position 2, which is the Secondary Item, will automatically become unavailable to that user.



3. Traka User 01 logs in again to return the Primary Item to Position 1. Now, the Item in Position 2 becomes available to the user again.

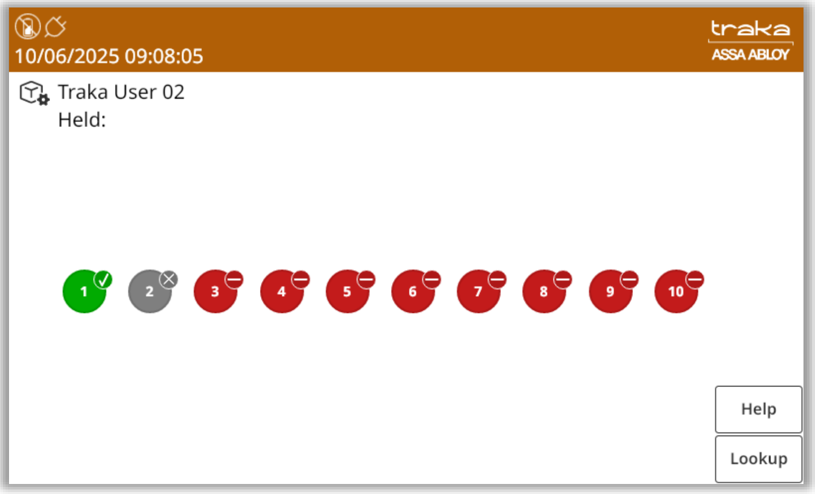


4. If the Traka User 01 now removes the item from Position 2, the item in Position 1 will automatically become unavailable.



NOTE: This feature will prevent one user from removing both paired items from the system at any given moment and the user will need to return one item to remove the other.

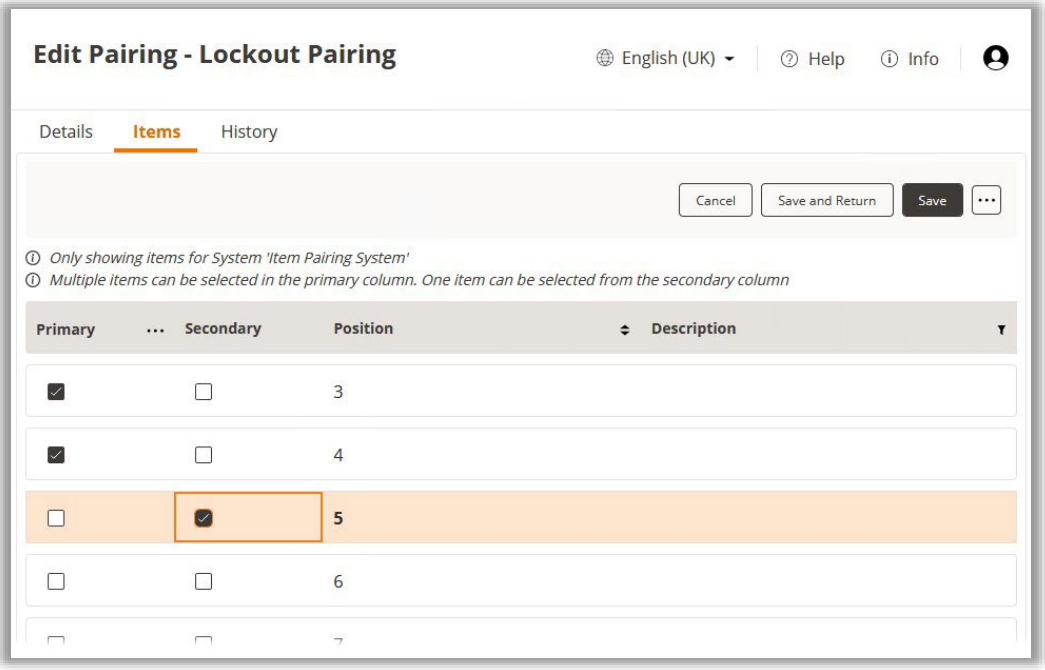
5. If the Traka User 02 logs in at that time, they will be able to remove the item from Position 1 (that is the only Item they are authorized to remove).



6.12.1.9 LOCKOUT PAIRING RULE

Setup

Once a Lockout Pairing Rule has been set in place in TrakaWEB, the feature will work on the selected system as soon as the synchronization completes. In the example below, the following Lockout Pairing Rule has been created:

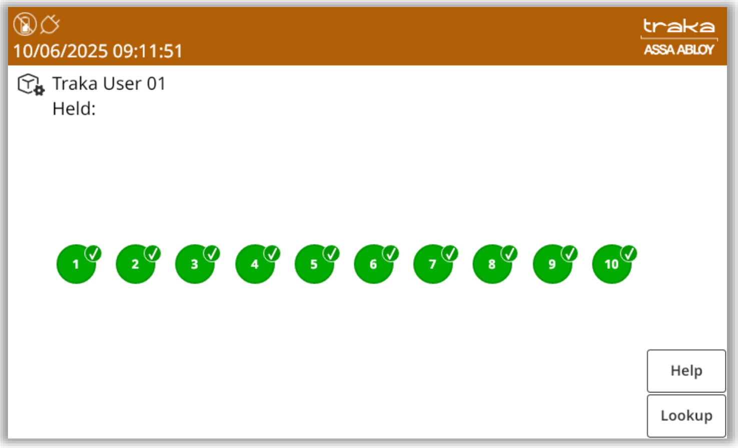


The items in Positions 3 and 4 have been set as the Primary items, and the item in Position 5 has been set as the Secondary item.

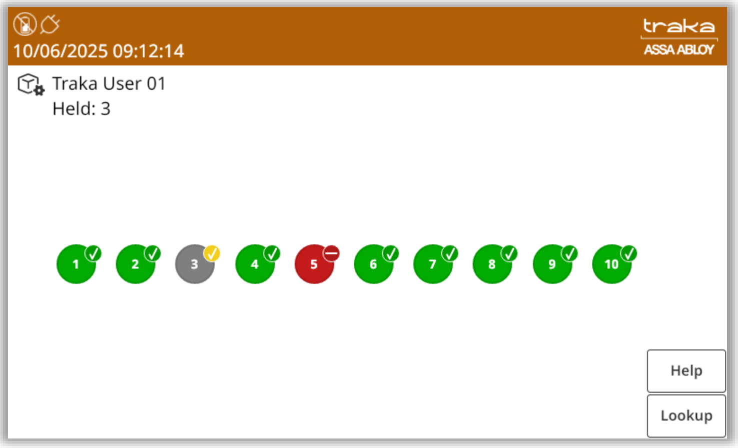
Two users are registered on the system: Traka User 01 who has access to all the items stored in the system, and Traka User 02 who has only got access to the items in Positions 4 and 5.

Application

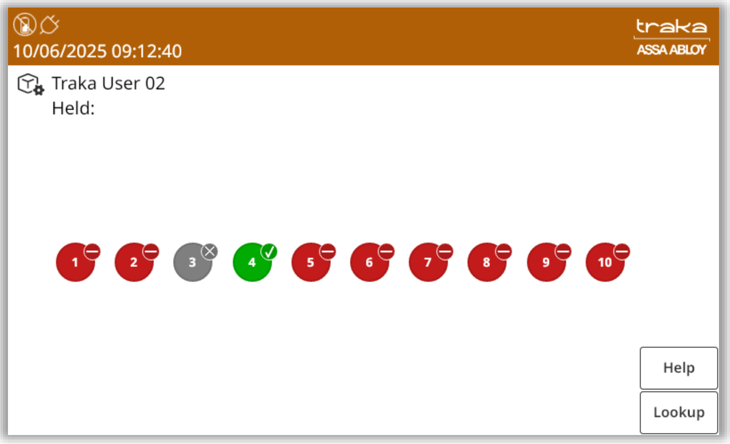
1. When Traka User 01 logs into the affected Traka Touch system, they can remove any item from it. They choose to remove the item in Position 3.



2. Once the item has been taken from Position 3, which is one of the Primary items in the Item Pairing rule, the item in Position 5, which is the Secondary item, will automatically become unavailable, but the other Primary item in Position 4 is still available.



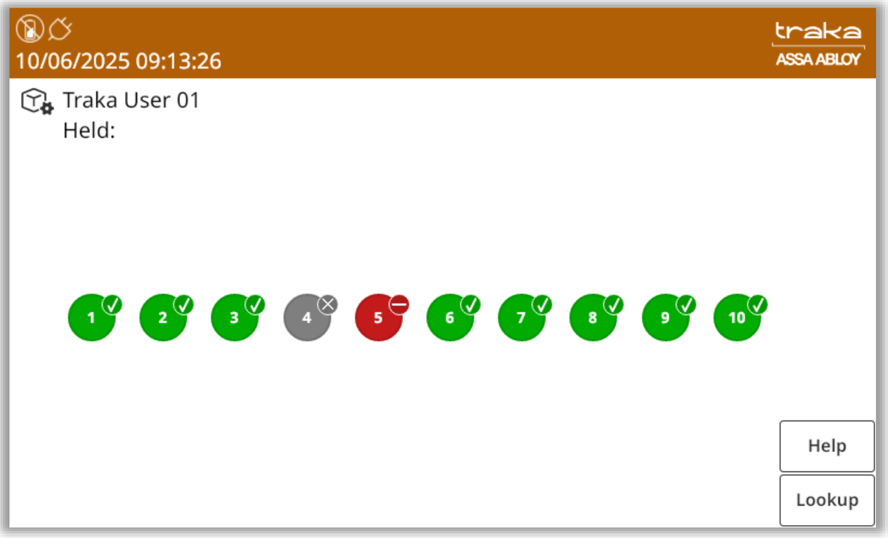
3. If the Traka User 02 logs in at that time, they will be able to remove the item in Position 4, but they will not be able to remove the item in Position 5.



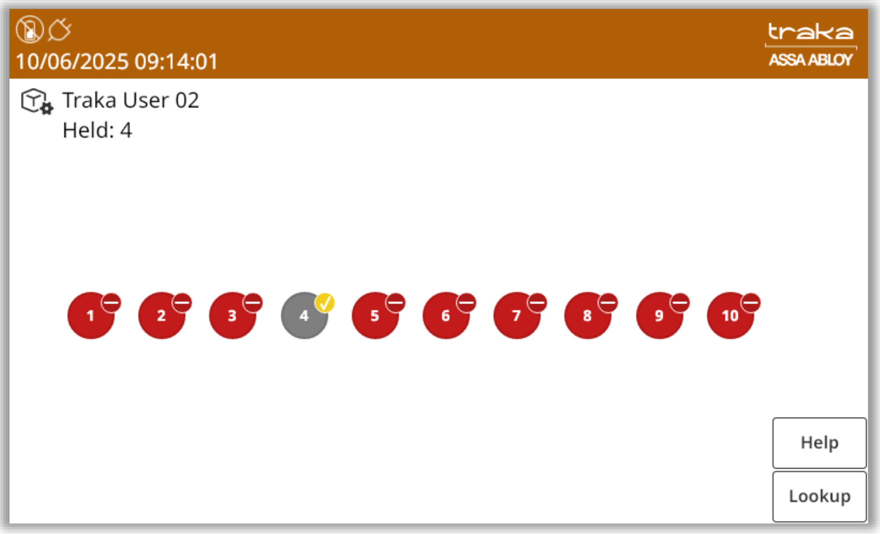
NOTE: As long as any Primary items are out of the system, the Secondary item will be unavailable, regardless of who is trying to access it.

4. Traka User 02 removes the other Primary item from Position 4.

5. When Traka User 01 logs in again and they return the item to Position 3, they will see that the Secondary item in Position 5 is still unavailable as the item in Position 4 is now out of the system. Traka User 01 logs out.

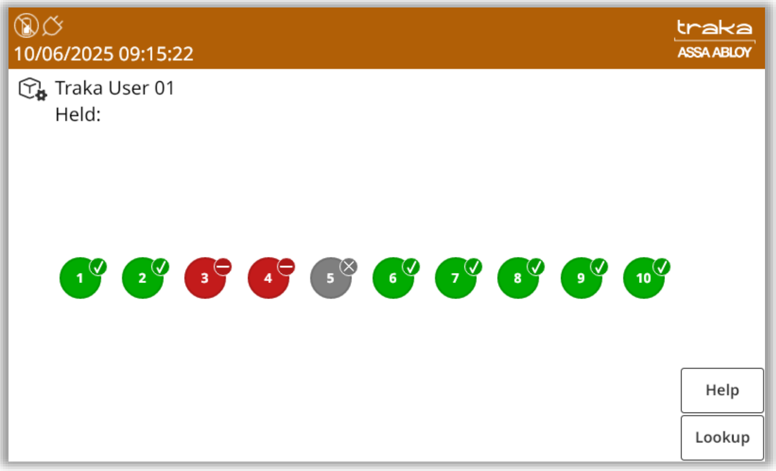


6. Traka User 02 logs in afterwards and returns the last Primary item to the system. They are now able to remove the Secondary item from Position 5. Traka User 02 removes that item.



NOTE: As long as the Secondary item is out of the system, no user can remove any of the Primary items.

7. When Traka User 01 logs into the system, they are not able to remove any of the Primary items as the Secondary item is still out of the system.



6.12.1.10 ITEM PAIRING ON ADVANCED FIFO SYSTEMS

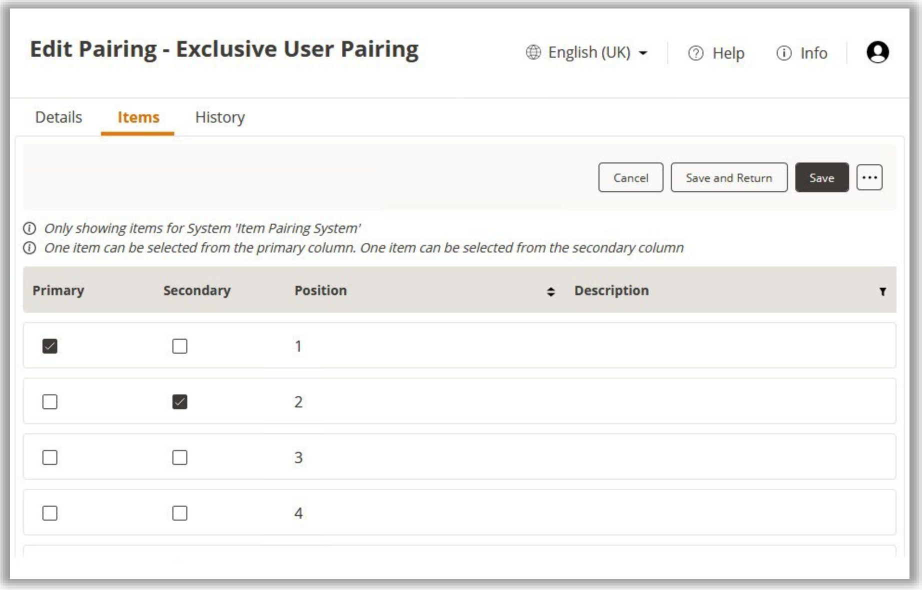
When the Item Pairing feature is enabled on Advanced FIFO systems, the items associated with selected Item Pairing Rules will follow the same rules which are in place for the Fixed Return to Single System systems, but they will also be accessible to the system users on a First In-First Out basis, provided that the Item Pairing Rule conditions have been met and the user who is trying to access items has been authorized to remove them from the affected system(s). To read more on the Advanced First In-First Out feature, please refer to **UD0232 – TrakaWEB FIFO and Advanced FIFO User Guide**.

6.12.1.11 EXCLUSIVE ITEM PAIRING RULE

6.12.1.11.1 EXAMPLE 1 – ITEM PAIR WITHIN ONE COMMON ITEM ACCESS GROUP

Setup

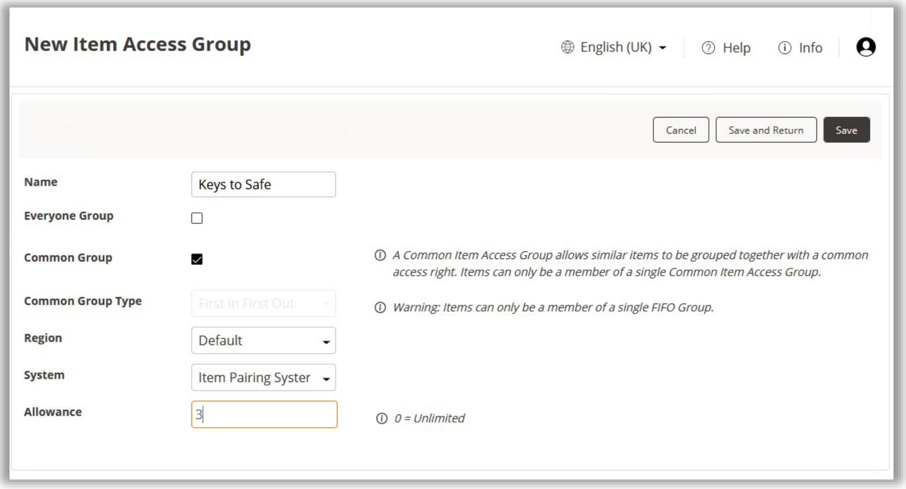
Once an Exclusive User Pairing Rule has been set in place in TrakaWEB, the feature will work on the selected system as soon as the synchronisation completes. In the example below, the following Exclusive User Pairing Rule has been created:



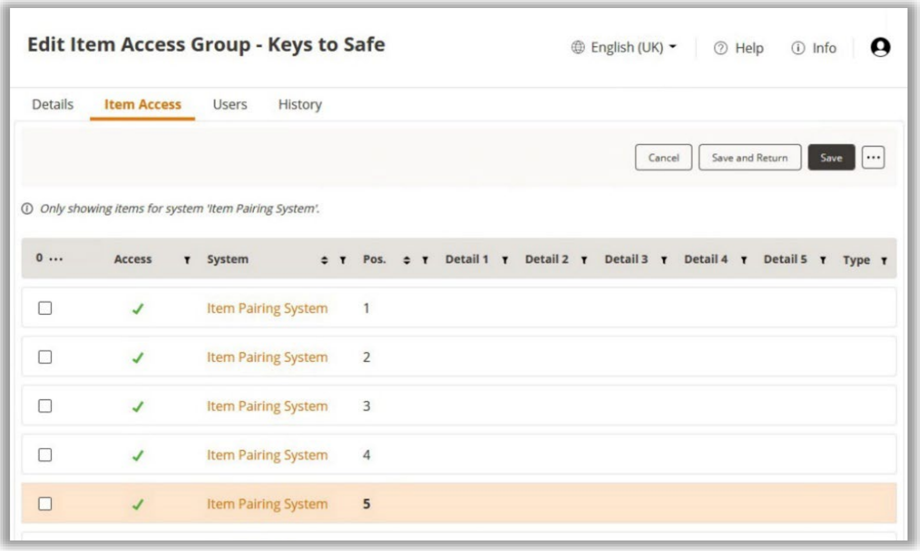
The item in Position 1 has been set as the Primary item, and the item in Position 2 has been set as the Secondary item.

Two users are registered on the system: Traka User 01 and Traka User 02.

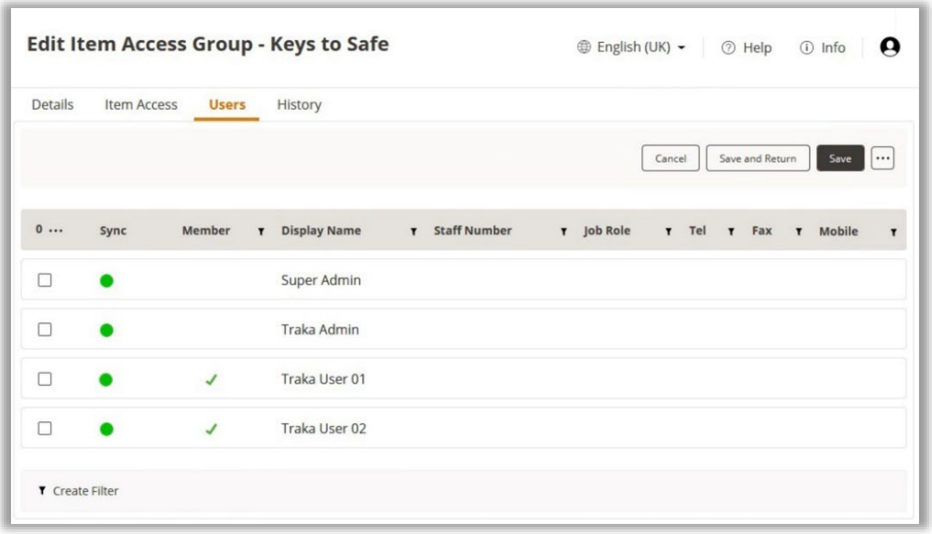
One Common Item Access Group (CIAG) has been set up for the affected system and the Item Allowance within that CIAG has been set to 3.



All 5 items from the affected system have been assigned to that Common Item Access Group.

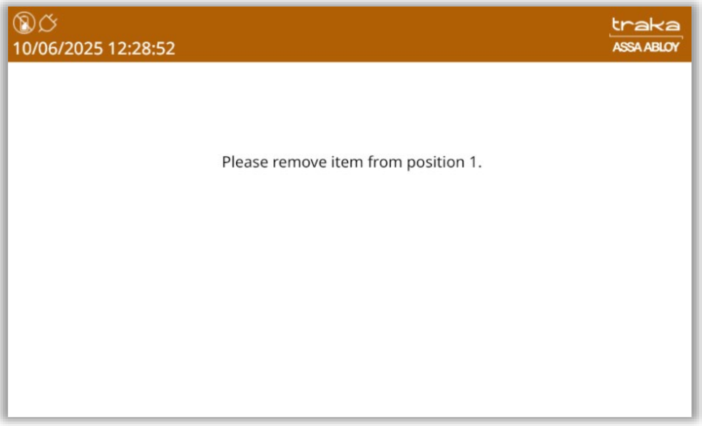


Both Traka User 01 and Traka User 02 have been made members of that CIAG.

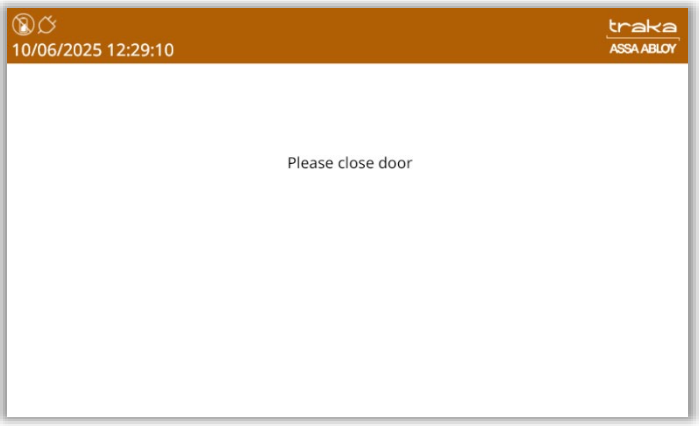


Application

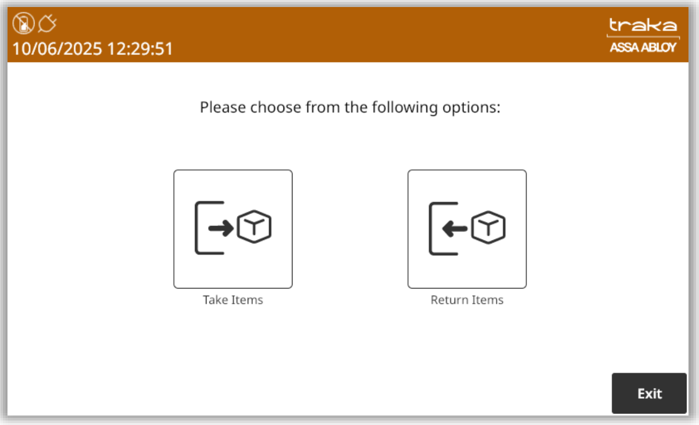
1. When Traka User 01 logs into the affected Traka Touch system, the system will automatically release the Item that has been in the system for the longest time. In this case, it is the item stored in Position 1.



2. After the user has removed the item, they will be asked to close the door to the system.



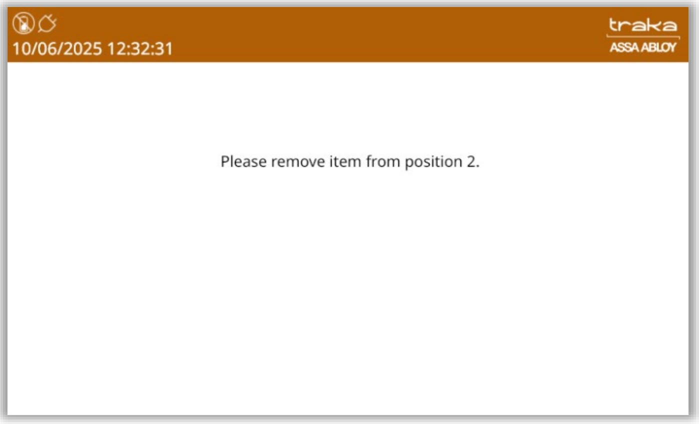
3. Since the Item Allowance within this group is 3, when the user logs back into the system, they will have the option to take another item. They will also have the option to return any items in their possession.



4. Traka User 01 selects the **Take Items** button. This automatically releases the next item within that CIAG which has been in the system for the longest time, with the exception of the item in Position 2. The item in Position 2 is the Secondary item in the User Exclusive Pairing and, since Traka User 01 has already taken the Primary item from the pair, they will not be able to remove the item from Position 2, even if the item in Position 2 has been in the system for the longest amongst all the remaining items in that system. Traka User 01 will receive the next one in the queue instead.

5. After taking the item from Position 3, the system will once again ask the user to close the door.

6. When Traka User 02 logs in, the system will automatically release the item in Position 2 to them, as this is the item that has been in the system for the longest and this user does not have the Primary item from the pair that item in Position 2 belongs to.

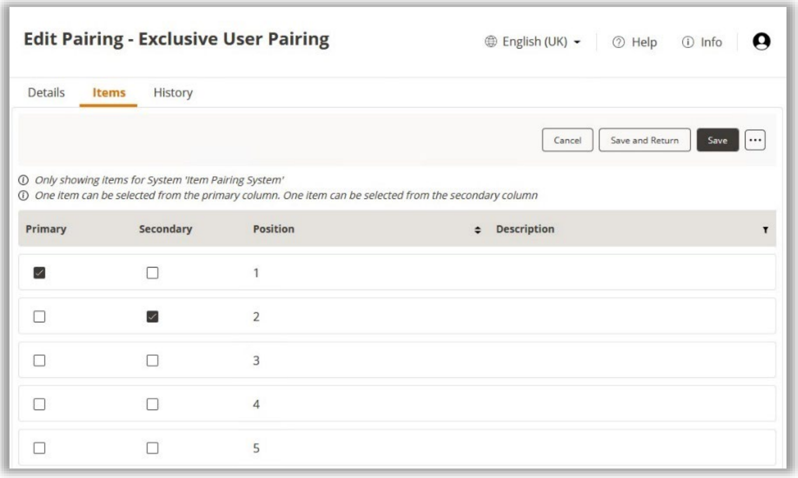


All the other functionalities typical of the Advanced FIFO feature will apply as normal.

6.12.1.11.2 EXAMPLE 2 – ITEM PAIR DIVIDED BETWEEN TWO COMMON ITEM ACCESS GROUPS

Setup

Once an Exclusive User Pairing Rule has been set in place in TrakaWEB, the feature will work on the selected system as soon as the synchronisation completes. In the example below, the following Exclusive User Pairing Rule has been created:

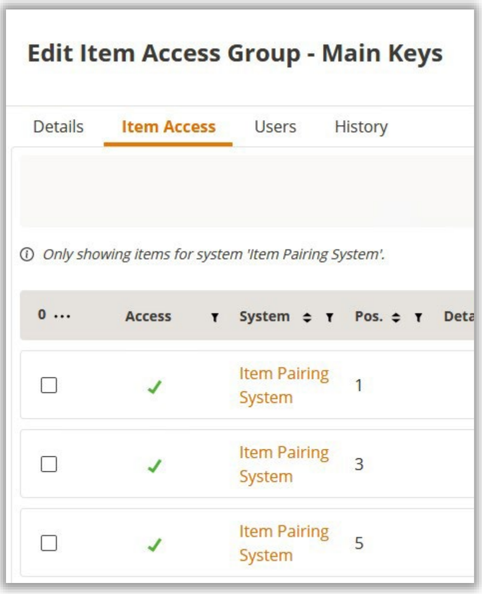


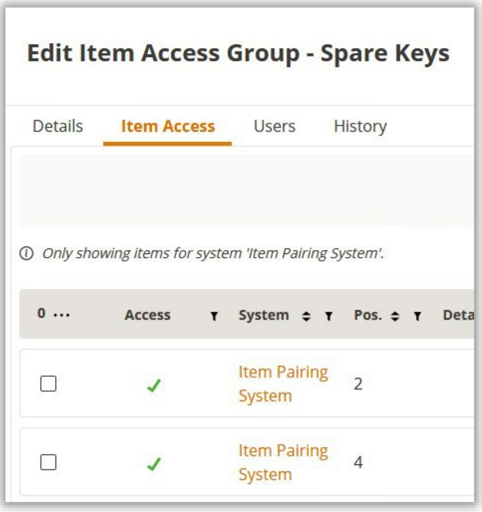
The item in Position 1 has been set as the Primary item, and the item in Position 2 has been set as the Secondary item.

Two users are registered on the system: Traka User 01 and Traka User 02.

Two Common Item Access Groups (CIAGs) have been set up for the affected system and the Item Allowance within each CIAG has been set to 2:

- Main Keys group which comprises items in Positions 1, 3, and 5
- Spare Keys group which comprises items in Positions 2 and 4.

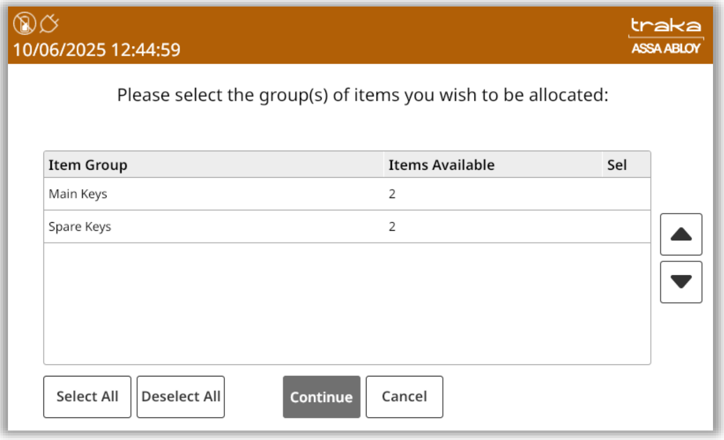




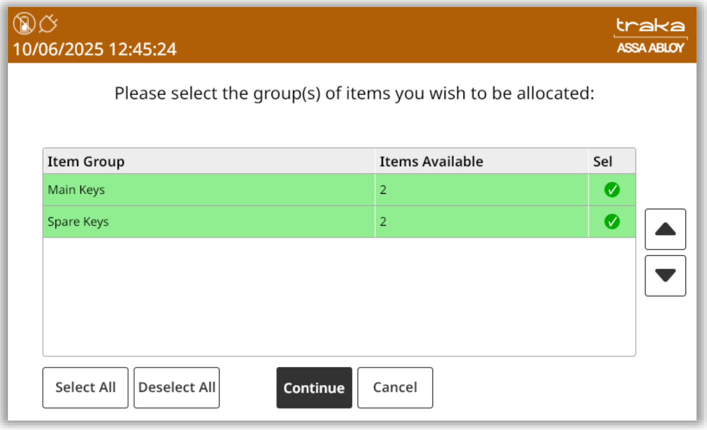
Both Traka User 01 and Traka User 02 have been assigned to both CIAGs.

Application

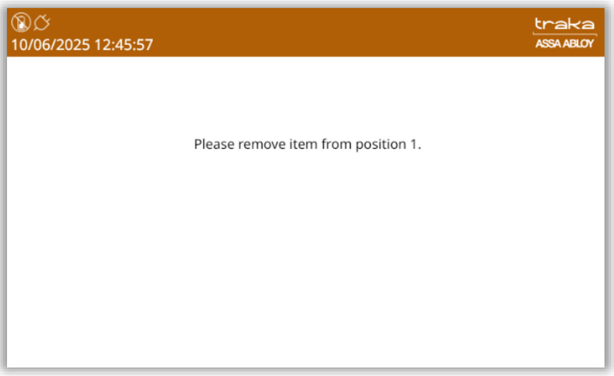
1. When Traka User 01 logs into the affected Traka Touch system, the system will ask which CIAGs the user needs to remove items from.

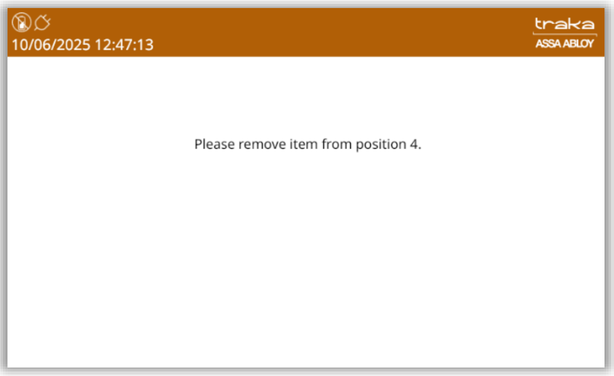


2. Traka User 01 chooses to remove items from both groups, selects them on the screen and clicks on Continue.



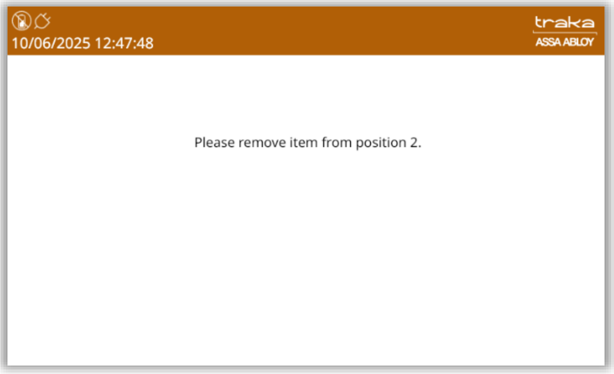
3. The system releases one item from the Main Keys group that has been in the system for the longest time and one item from the Spare Keys group that has been in the system for the longest time. In the example below, the system releases the items from Positions 1 and 4.

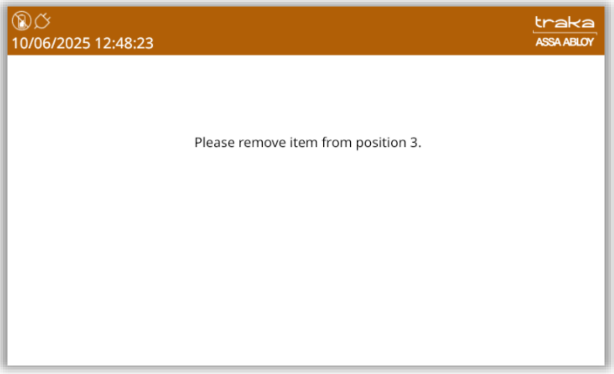




NOTE: As Traka User 01 has removed the item in Position 1 which is the Primary item in the Exclusive User Pairing Rule, the system will automatically ignore the item in Position 2 when handing out items from the second CIAG, as in accordance with the Item Pairing rule one user cannot hold both the Primary and Secondary items simultaneously.

4. When Traka User 02 logs in and removes items from both CIAGs, the system will again release one item from each group automatically. This time, the system will release the item in Position 2 as Traka User 02 does not hold the item from Position 1 on them.





All the other functionalities typical of the Advanced FIFO will apply as normal.

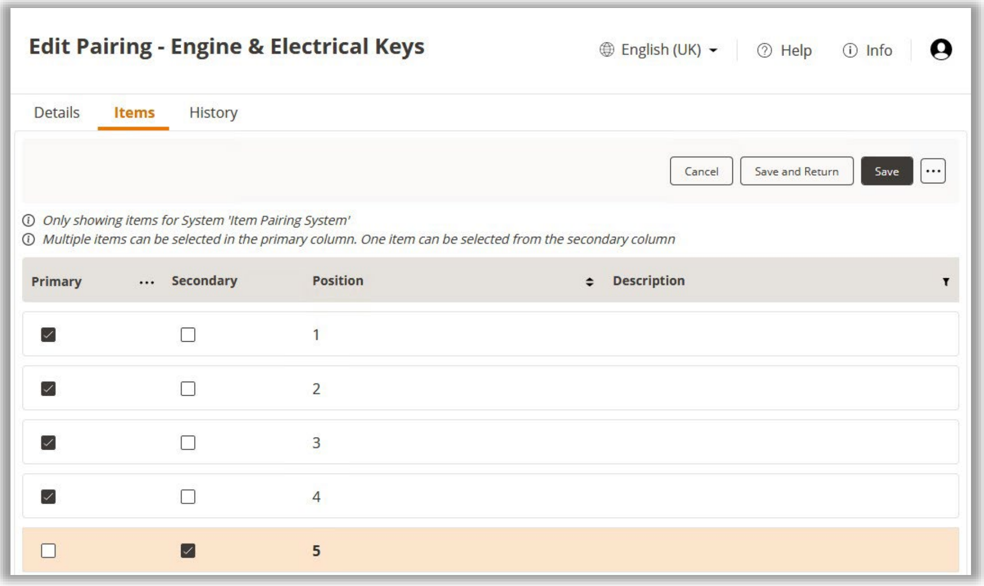
6.12.1.12 LOCKOUT PAIRING RULE

NOTE: With the Lockout Pairing Rule in place, we highly recommend assigning the Primary items into one or more CIAGs, and the Secondary Item to a separate CIAG. Although it is entirely possible to assign both the Primary items and the Secondary item into the same group, the system will be releasing them to authorized users in accordance with the First In-First Out principles. In this case, users would not be able to tell if the item they have received was one of the Primaries or the Secondary, and, if it were indeed the Secondary item, they would unknowingly block all other users from removing any of the Primaries.

6.12.1.12.1 EXAMPLE – ITEM PAIRING DIVIDED BETWEEN MULTIPLE COMMON ITEM ACCESS GROUPS

Setup

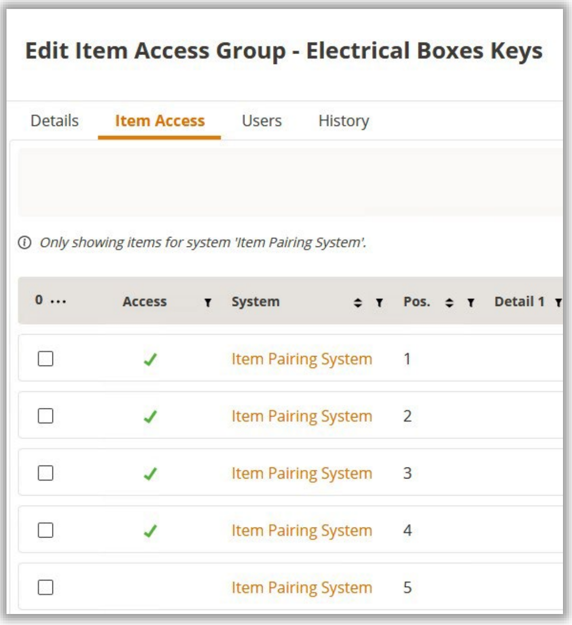
Once a Lockout Pairing Rule has been set in place in TrakaWEB, the feature will work on the selected system as soon as the synchronisation completes. In the example below, the following Lockout Pairing Rule has been set up:

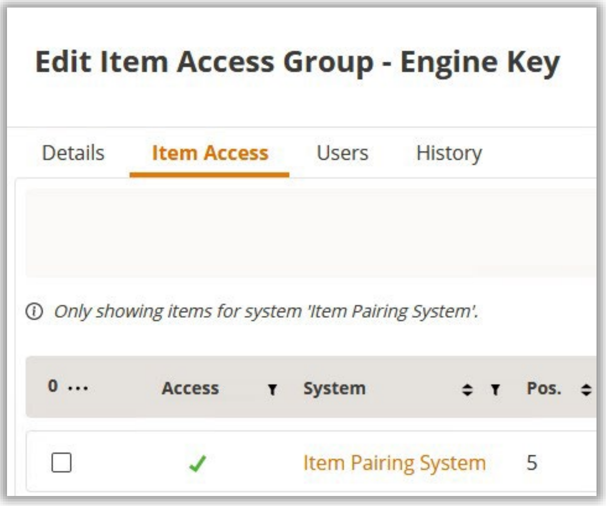


The items in Positions 1 to 4 have been set as the Primary items, and the item in Position 5 has been set as the Secondary Item.

Two Common Item Groups have been set up, one which will hold all the Primaries and the other which will hold the Secondary. Both have an allowance of 2.

NOTE: You can divide your Primary items between multiple Common Item Access Groups as required. In the example below, all Primary items are shown as belonging to one CIAG only for simplicity. Similarly, more than one item may belong to the group containing the Secondary item. We only recommend not assigning both the Primaries and the Secondary items into the same group.

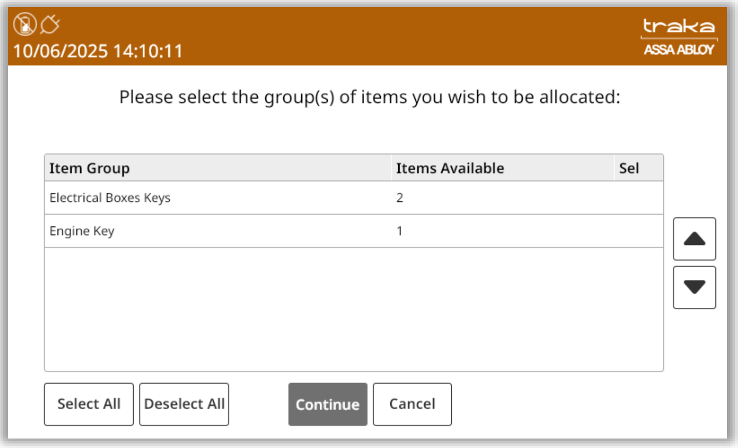




Two users have been registered on the system: Traka User 01 and Traka User 02. Both have been assigned to both CIAGs.

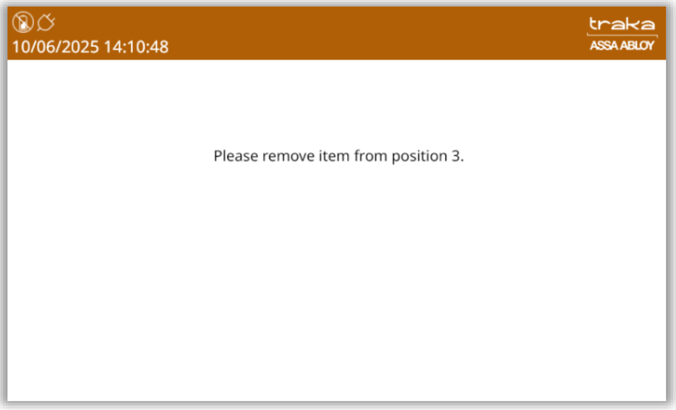
Application

1. When Traka User 01 logs into the affected Traka Touch system, the system will ask which CIAGs the user needs to remove items from.

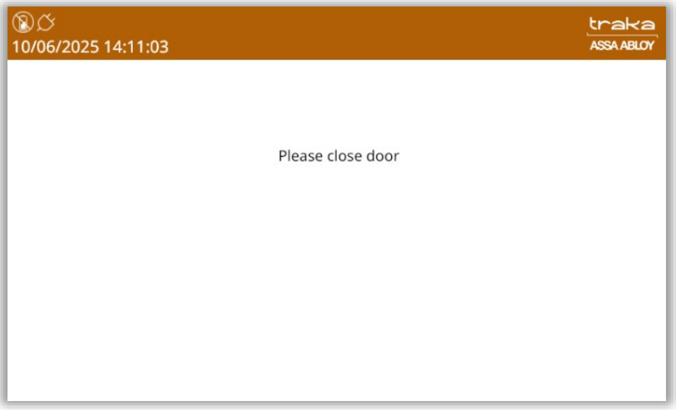


2. Traka User 01 selects the Electrical Boxes Keys (the CIAG with Primaries) and the system releases one key from that group to them. The system releases items from that group following the First In-First Out principles. In the example below, the item in Position 3 has been in the system the longest and this item will be released.

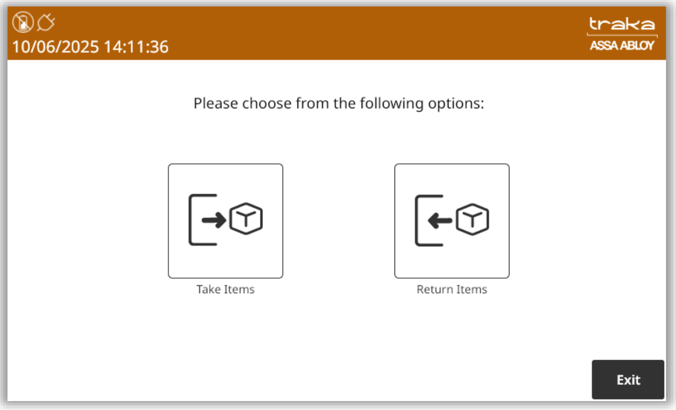
NOTE: Since Traka User 01 removed one of the Primary items, the access to the Secondary item will be automatically blocked to them and any other user.



3. After removing the item from position 3, the user will be asked to close the door.



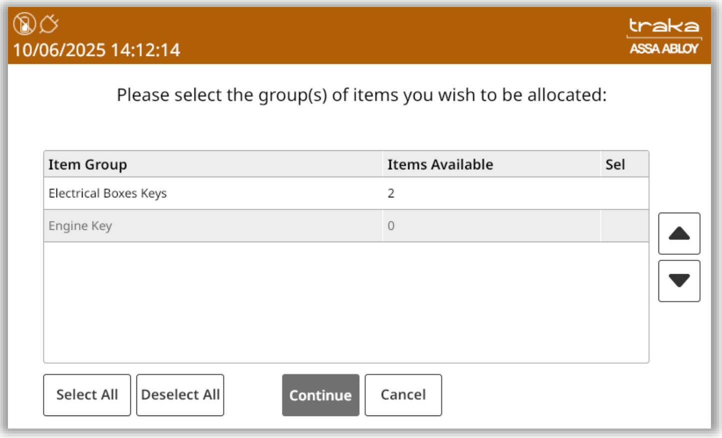
4. Since the Item Allowance within this group is 2, when the user logs back into the system, they will have the option to take another item. They will also have the option to return any items in their possession.



5. If the user selects the **Take Items** button, provided that the item allowance for the CIAG permits it, another primary item that has been in the system the longest, will be released to the user.

6. Traka User 01 closes the door and is logged out.

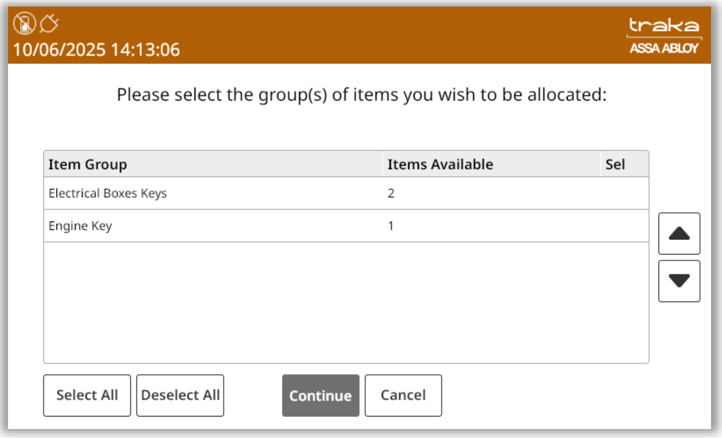
7. When Traka User 02 logs into the system, they are taken to the CIAG selection screen and will also see the Engine Key group unavailable. This is because one of the Primary items is still out of the system. Traka User 02 can only select to remove items from the Electrical Boxes Keys group. If they select that group, the system will release one item from that group in accordance with the First In-First Out principle.



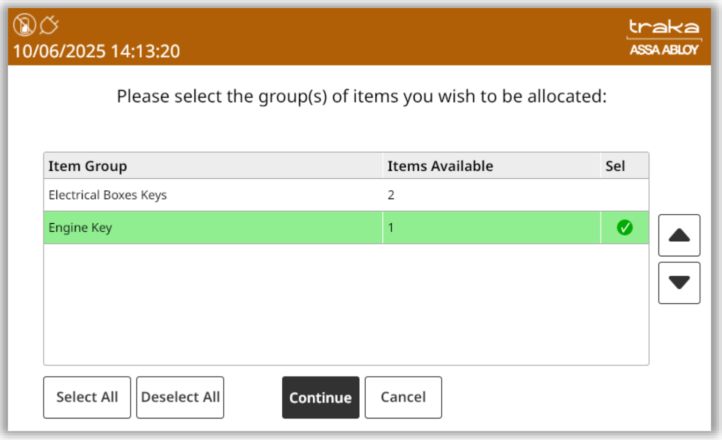
8. Traka User 02 does not remove any items and logs out.

9. Next, Traka User 01 logs in and returns one of the Primary items they have held.

10. Then Traka User 02 logs in again and they are taken to the CIAG selection screen.

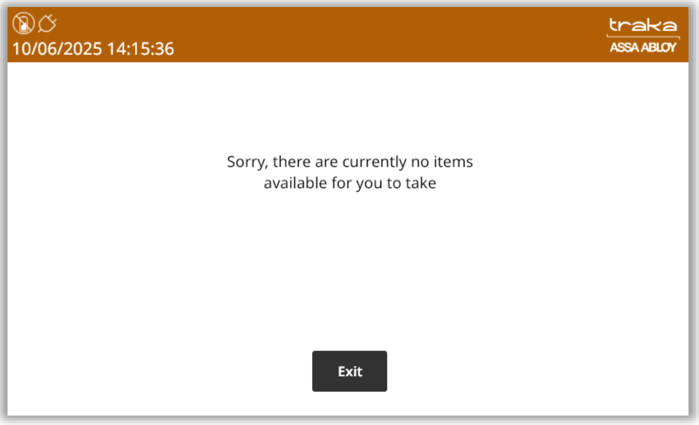


11. Since all the Primary items from the Electrical Boxes Keys group are now back in the system, Traka User 02 is allowed to remove an item from the Engine Key group.

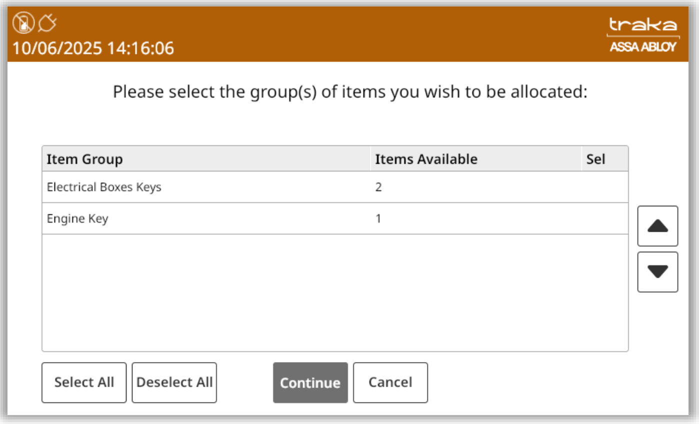


12. Since the item in the Engine Key group is the Secondary item, its removal blocks all the Primary items in the system. No user is now allowed to remove them until the Secondary item has been returned. Since the Electrical Boxes Keys CIAG consists only of the Primary items, all of them become automatically unavailable. Traka User 02 is automatically logged out.

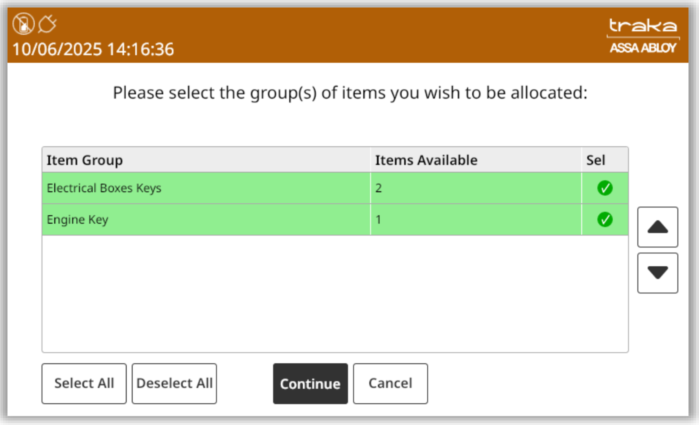
13. If Traka User 01 tries to log in then, a message will appear on screen informing them that they have been recognized but there are no items available for them to take.



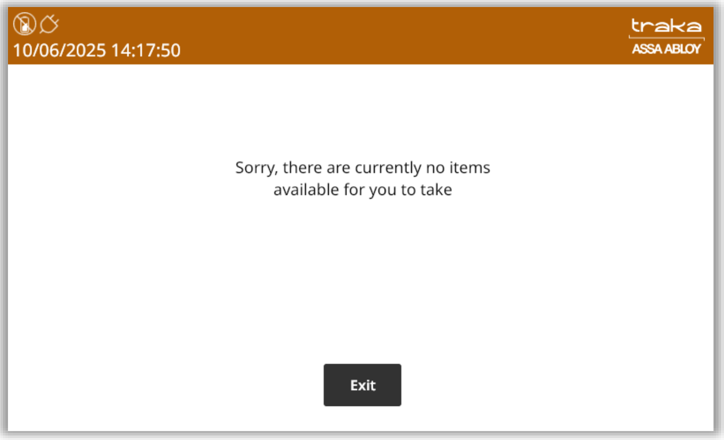
14. Once the Secondary item from the Engine Key CIAG has been returned by Traka User 02, the users regain access to the affected CIAGs.



NOTE: If a user chooses to remove items from more than one CIAG, and one of the selected CIAGs contains Primary items and another one contains the Secondary item, then the system will release the item with the smallest Position number first, regardless of which group that item belongs to, following the First In-First Out principle.



Once the first item has been removed, the system will check if the item has been associated with any Item Pairing Rules. If it was a Primary item, the system will then be unable to release the Secondary item. If it is the Secondary item, the system will be unable to release any of the Primary items. It will then show the following message.



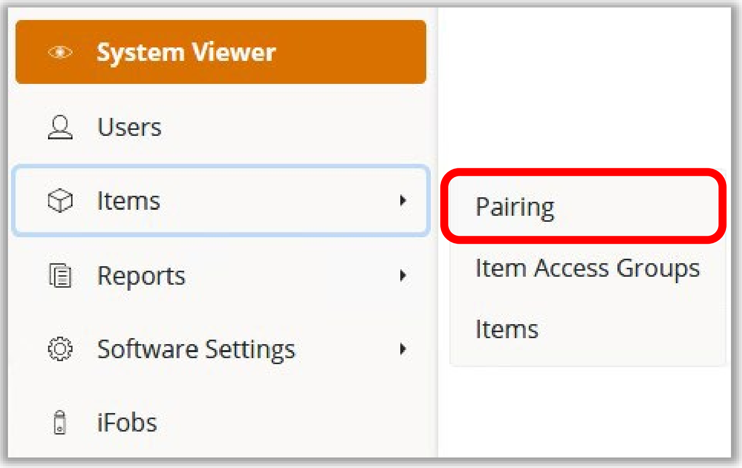
6.12.1.13 NO OVERRIDE FOR ITEM PAIRING

Since the Item Pairing is a security feature, for the safety of users and property there is no option available to grant users permissions to override the Item Pairing.

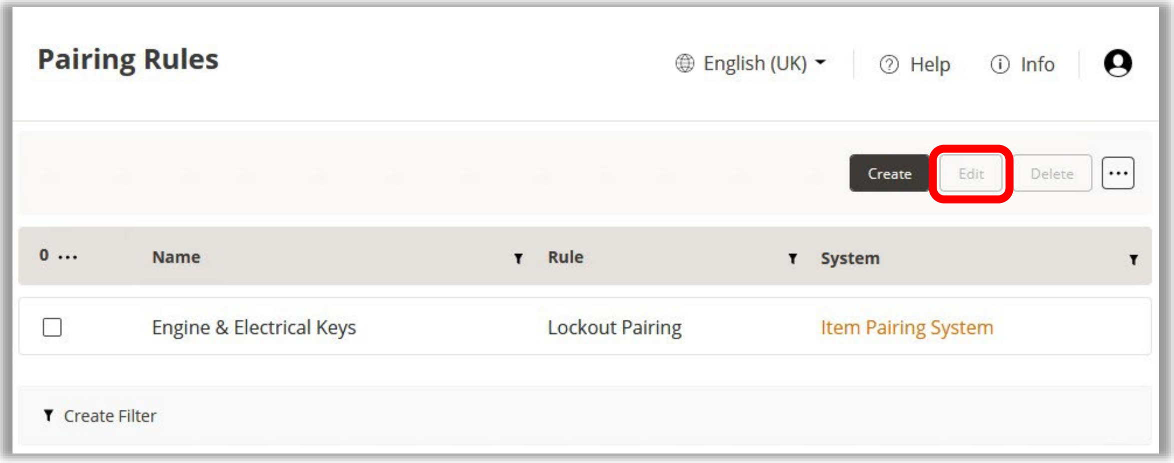
6.12.1.14 ITEM PAIRING HISTORY

For the purposes of audit, all the changes in the Item Pairing Rules are recorded in the History tab for each Item Pairing rule.

1. To access the History tab for your chosen Item Pairing Rule, select **Items** on the Navigation Menu. The menu will expand and reveal the **Pairing** sub-menu:

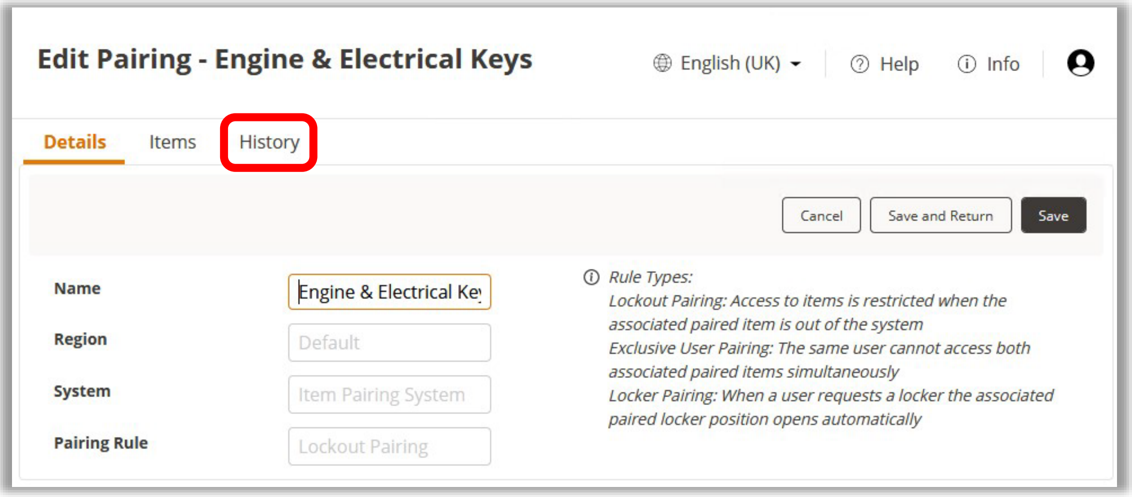


2. TrakaWEB will then display all the current Item Pairing rules that exist within the database. Select one of the existing Item Pairing rules and either click on **Edit** on the Toolbar or double-click on the selected rule to start editing it.

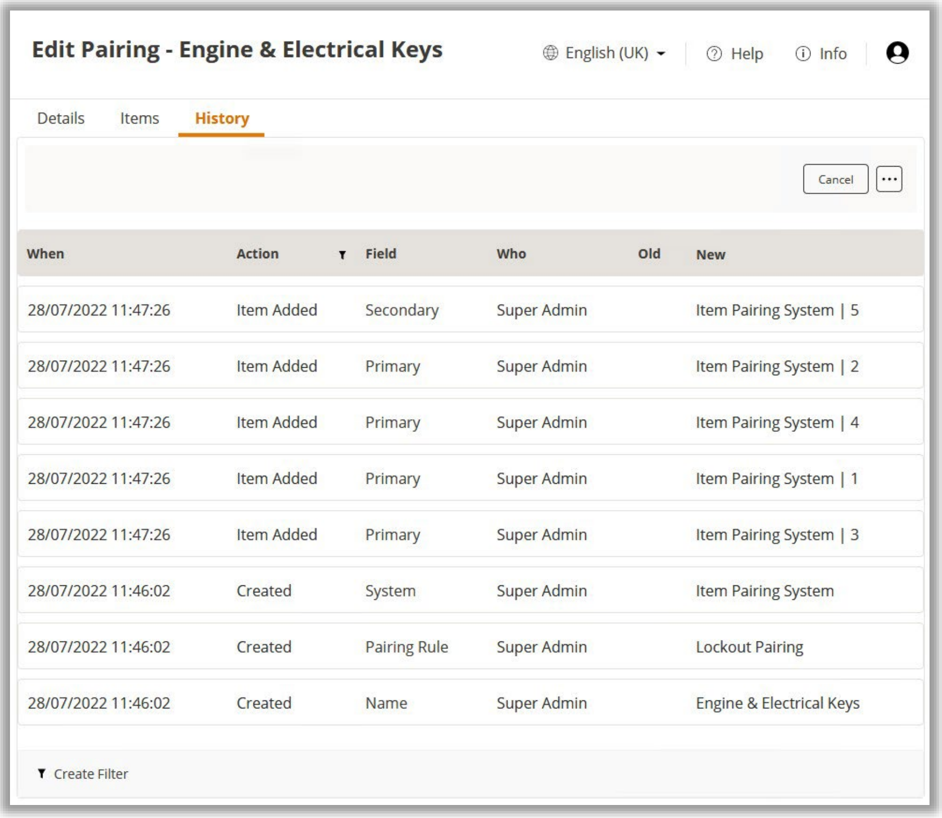


You will be redirected to the Edit Pairing **Details** page.

3. Select the **History** tab.

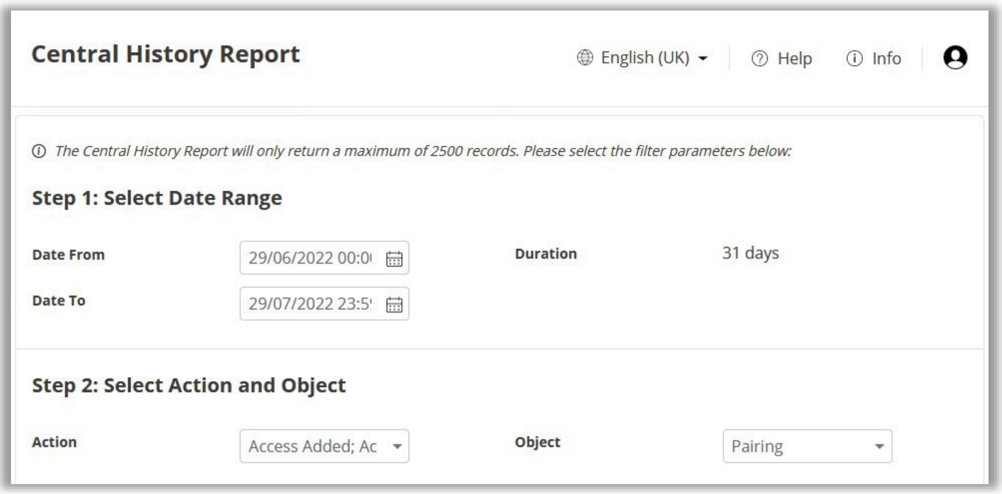


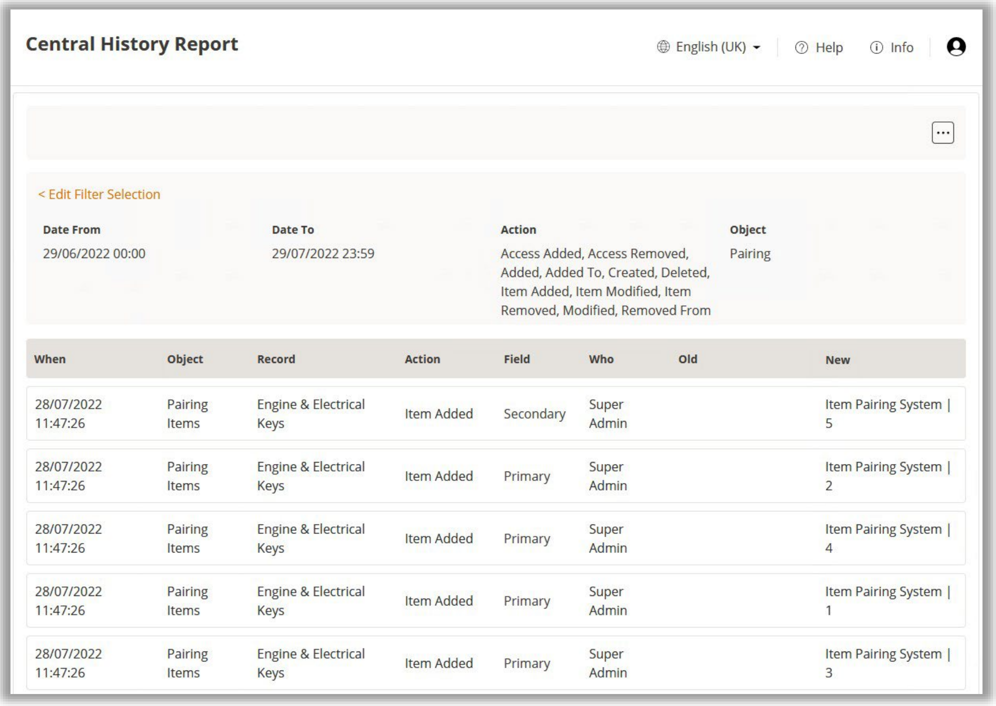
You will then see the recorded history of all the changes to that Item Pairing Rule.



6.12.1.15 ITEM PAIRING IN TRAKAWEB REPORTS

All the events related specifically to the Item Pairing Rules will be visible in the Central History Report. You can also create a Central History Report and specifically choose **Pairing** as the Object for the report. To read more on how to generate such a report, please refer to the General Reports section in this document.




Central History Report
English (UK)
Help
Info
< Edit Filter Selection
Date From
29/06/2022 00:00
Date To
29/07/2022 23:59
Action
Access Added, Access Removed, Added, Added To, Created, Deleted, Item Added, Item Modified, Item Removed, Modified, Removed From
Object
Pairing
When | Object | Record | Action | Field | Who | Old | New
28/07/2022 11:47:26 | Pairing Items | Engine & Electrical Keys | Item Added | Secondary | Super Admin | | Item Pairing System | 5
28/07/2022 11:47:26 | Pairing Items | Engine & Electrical Keys | Item Added | Primary | Super Admin | | Item Pairing System | 2
28/07/2022 11:47:26 | Pairing Items | Engine & Electrical Keys | Item Added | Primary | Super Admin | | Item Pairing System | 4
28/07/2022 11:47:26 | Pairing Items | Engine & Electrical Keys | Item Added | Primary | Super Admin | | Item Pairing System | 1
28/07/2022 11:47:26 | Pairing Items | Engine & Electrical Keys | Item Added | Primary | Super Admin | | Item Pairing System | 3

6.12.2 LOCKER PAIRING: FRSS

Locker Pairing can be used on Touch systems working in the Fixed Return to Single System (FRSS) mode. It can be setup to function with locker systems as RFID and or non-RFID. This will allow a user to take one or more primary items from separate compartments and automatically be given an item from a secondary compartment. The reverse of this process however is not the case.

An example of its application could be a supermarket that may have one or more barcode scanners held in multiple compartments and the batteries for the scanners held in another.

NOTE: At Traka We recommend that the standard use case for the secondary compartment be non-RFID and the primaries be RFID, although TrakaWEB does allow combinations of either.

NOTE: If the "Allow any user to return items" configuration option has been enabled with Locker Pairing, it is critical that during handover between users that both paired items are handed over and that the user returning the items has access to both paired locker compartments.

Should you require a change to your chosen configuration, please contact Traka or your Distributor.

6.12.2.1 LIMITATIONS

Due to the nature of the Locker Pairing feature, it is incompatible with the following features on TrakaWEB/Traka Touch:

- Random Return to Single System (RRSS)
- Random Return to Multiple Systems (RRMS)
- Temporary Key Store (TKS)
- AFIFO

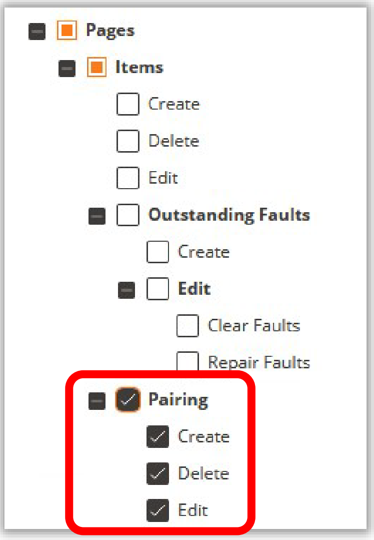
6.12.2.2 ENABLE LOCKER PAIRING

To enable Locker Pairing on TrakaWEB, at least one of the systems connected to TrakaWEB must be configured to work with the Pairing function enabled. To enable Locker Pairing for a specific system, you will need to upload an appropriate Config file onto that system.

To obtain the relevant Config files with the Pairing option enabled for your systems, contact Traka or your Distributor.

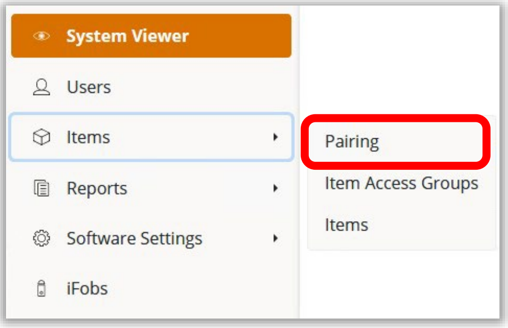
6.12.2.3 LOCKER PAIRING SOFTWARE PERMISSIONS

As a TrakaWEB administrator, you may or may not have the necessary permissions to create, edit, or delete Locker Pairing rules. To check if your Software Permissions Group has got appropriate permissions, make sure that the following checkboxes relating to the Locker Pairing are ticked in the Edit options of your Software Permissions Group. The Locker Pairing permissions can be found in the software permissions tree under **Web > Pages > Items > Pairing:**

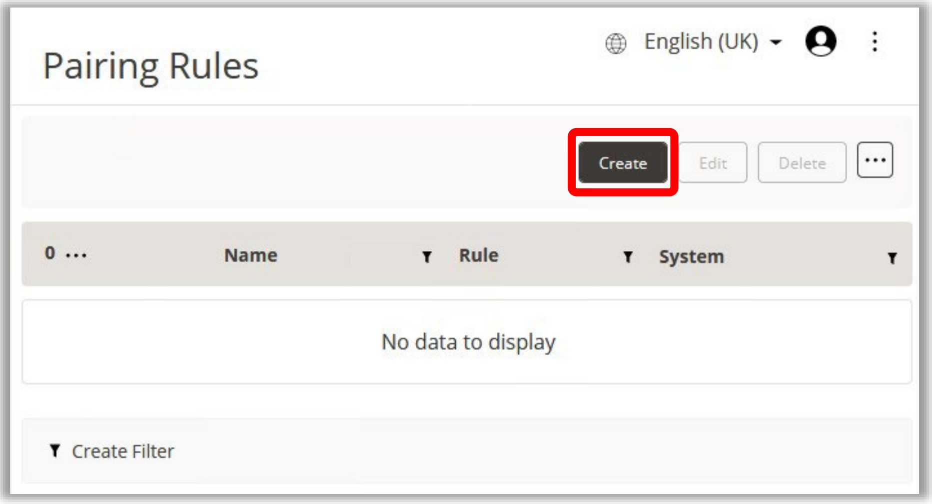


6.12.2.4 CREATE A LOCKER PAIRING RULE

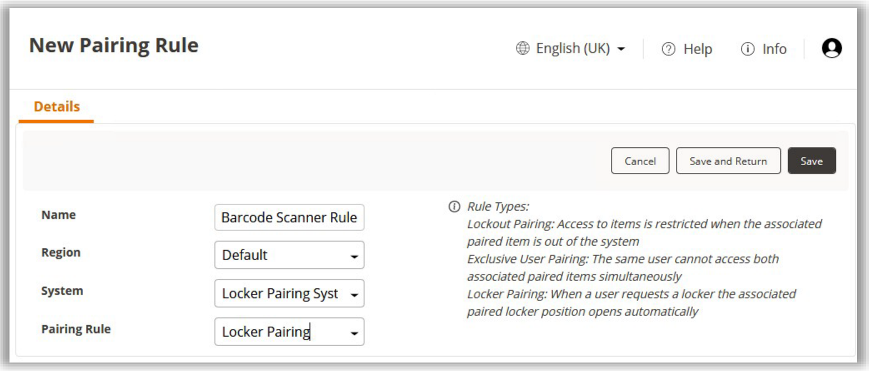
1. To create a Locker Pairing rule, select **Items** on the Navigation Menu. The menu will expand and reveal the **Pairing** sub-menu:



2. TrakaWEB will then display all the current Locker Pairing rules that exist within the database. Click on the **Create** button on the Toolbar.



3. You will be taken to a new page, where you will need to provide a name for the new rule, and then subsequently select the Region and the System which will be affected by the new rule, as well as select the Pairing Rule that you need to create.



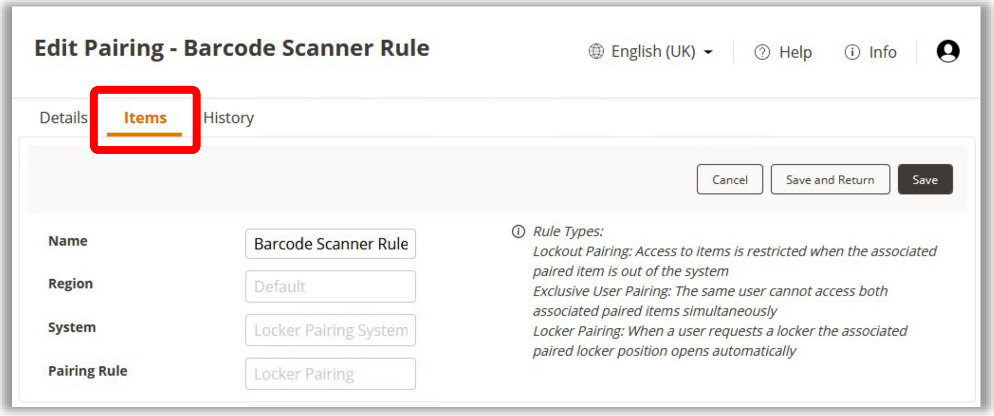
The only pairing rule available is Locker Pairing which will automatically be selected when you click on the Pairing Rule.

4. Once you have made your selection, click on **Save**.

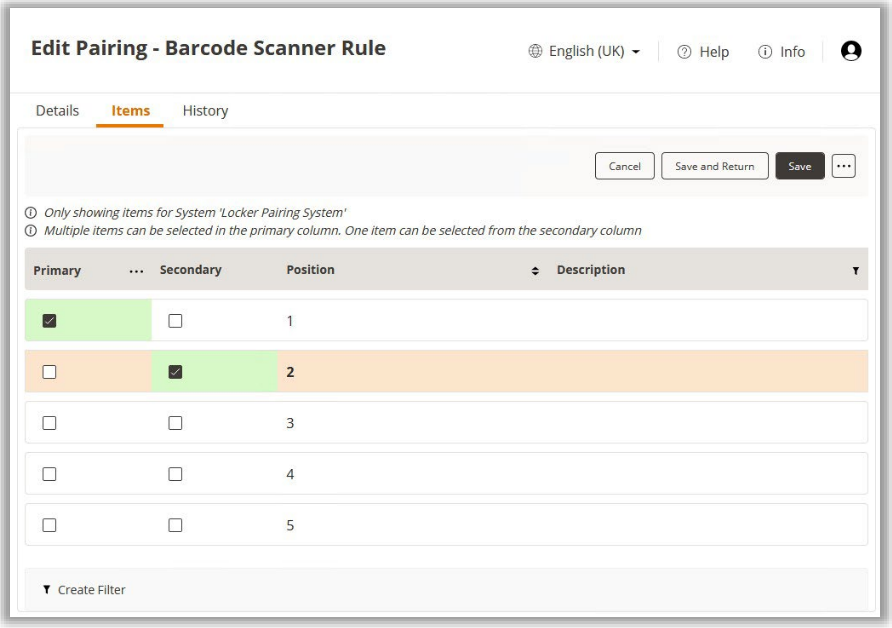
NOTE: Once you have created the rule, you will not be able to change its selected Region, System, or Pairing Rule Type. If that is the case, you will need to delete the rule and create a new one instead.

The page will now update, and your selected Region, System, and Pairing Rule Type will be greyed out. You will also gain access to two new tabs: Items and History.

5. Select the **Items** tab.



6. Select your Primary and Secondary Items by checking the boxes in the relevant columns next to the respective Items' positions.

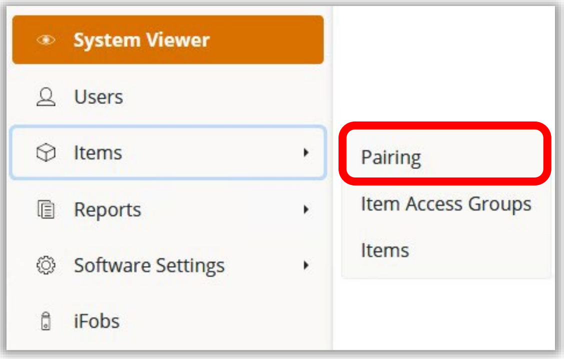


NOTE: With Locker Pairing, you may select only one Secondary item, but you may select multiple Primary items as required.

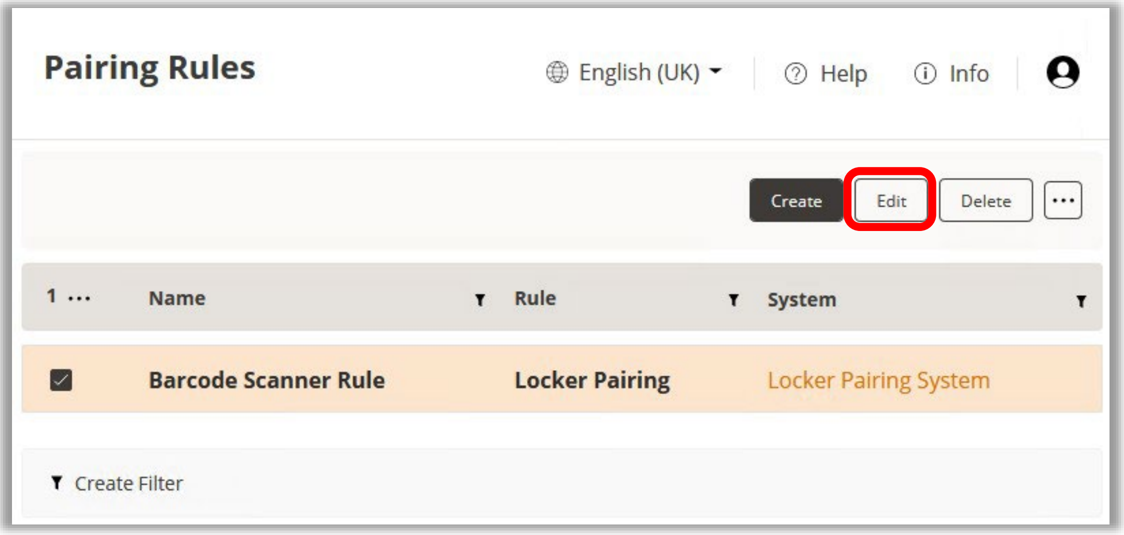
7. Once you have chosen your Items for the Locker Pairing Rule, click on **Save and Return**.

6.12.2.5 EDIT A LOCKER PAIRING RULE

1. To edit a Locker Pairing rule, select **Items** on the Navigation Menu. The menu will expand and display the **Pairing** option.



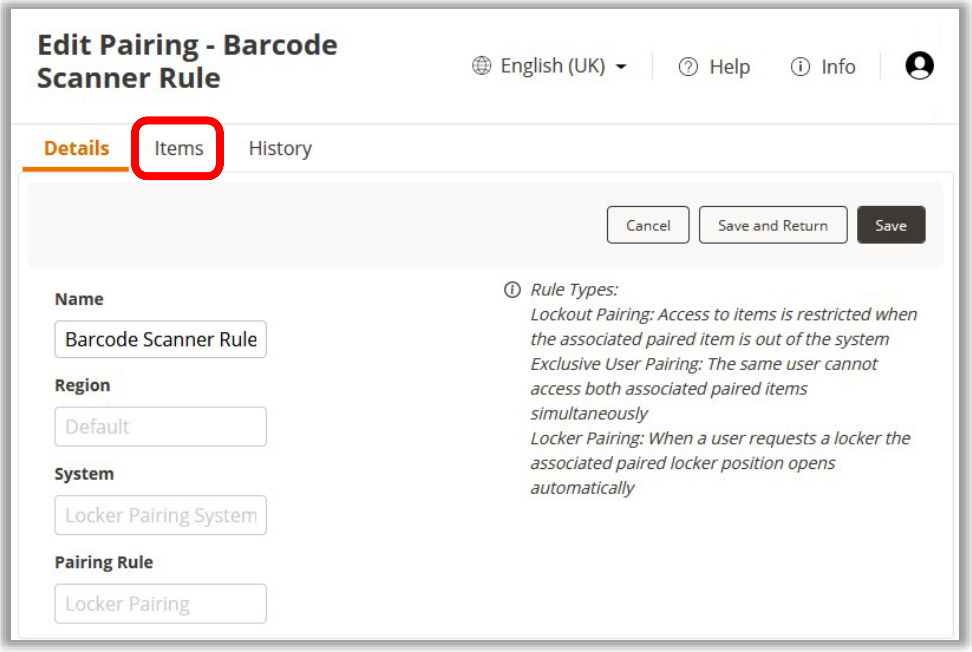
2. TrakaWEB will then display all the current Locker Pairing rules that exist within the database. Select one of the existing Locker Pairing rules and either click on **Edit** on the Ribbon Toolbar or double-click on the selected rule to start editing it.



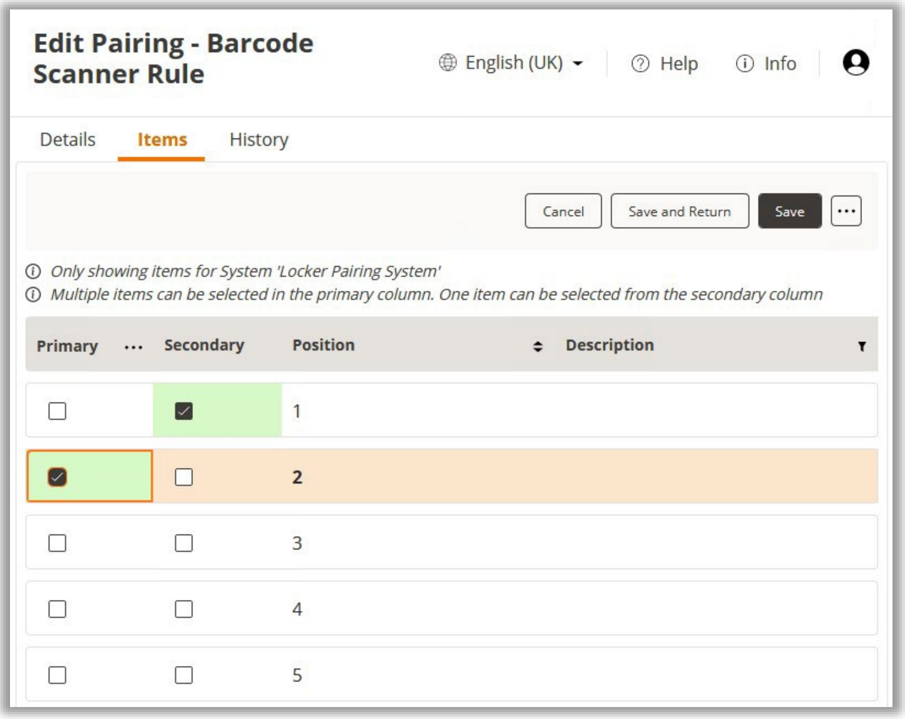
You will be redirected to the Edit Pairing rule **Details** page. You will notice that you cannot edit any of the Region, System, or Locker Pairing Rule Type details.

NOTE: Once a rule has been created, you will not be able to change its selected Region, System, or Pairing Rule Type. If that is the case, you will need to delete the rule and create a new one instead.

3. Select the **Items** tab.



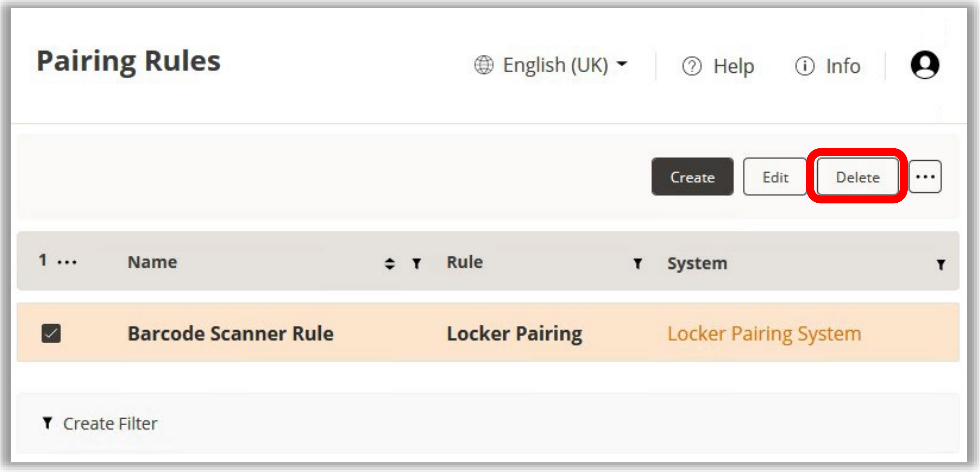
4. In the Items tab, change your selection of Primary and/or Secondary items in the Pairing Rule as required.



5. Click on **Save and Return**.

6.12.2.6 DELETE A LOCKER PAIRING RULE

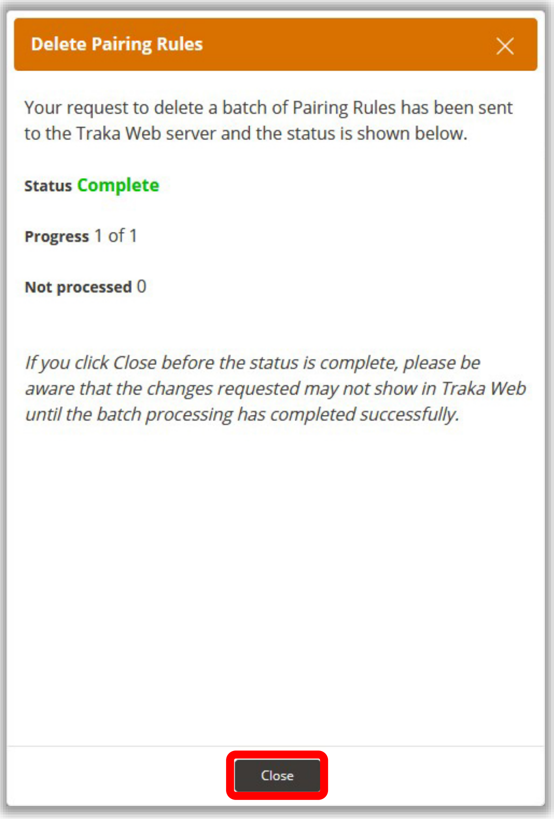
1. To delete a Locker Pairing rule, navigate to the Pairing Rules page where all the current Locker Pairing rules will be displayed.
2. Select one of the existing Locker Pairing rules that you wish to delete and then click on the delete button on the Toolbar.



A window will appear asking you to confirm that you wish to delete the selected Item Pairing Rule. Select **Yes** to continue.

The rule will now be deleted.

3. Click on **Close** to exit from the window.



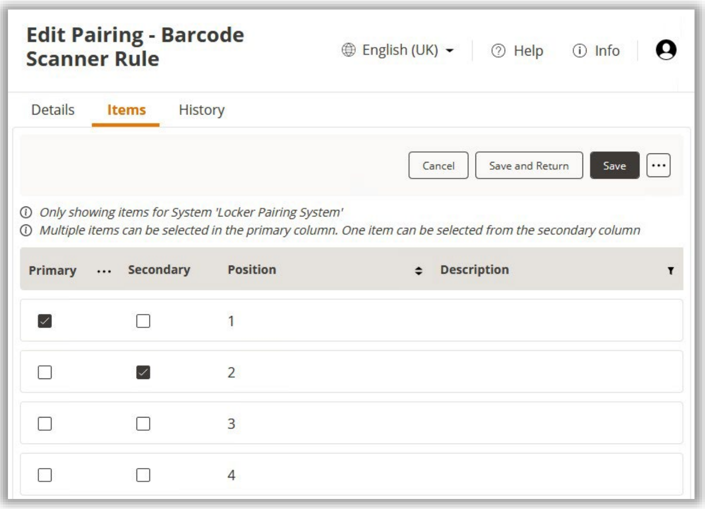
6.12.2.7 LOCKER PAIRING ON FRSS SYSTEMS

When the Locker Pairing feature is enabled on Fixed Return to Single System systems, the items associated with selected Locker Pairing Rules are accessible at any time, provided that the Locker Pairing Rule's conditions have been met and the user who is trying to access the items has been authorized to remove them from the affected system(s).

6.12.2.8 LOCKER PAIRING RULE

Setup

Once a Locker Pairing Rule has been set in place in TrakaWEB, the feature will work on the selected system as soon as the synchronisation completes. In the example below, the following Pairing Rule has been created:



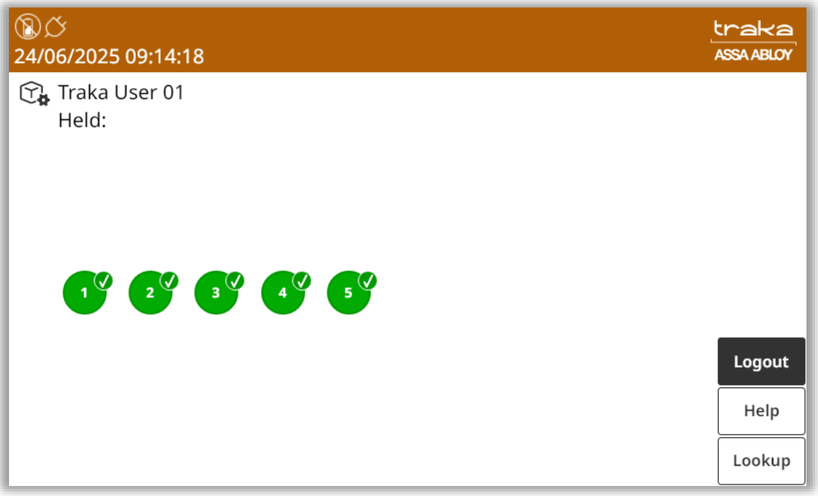
The item in Position 1 has been set as the primary item, and the item in Position 2 has been set as the secondary item.

Two users are registered on the system: Traka User 01 and Traka User 02. Both users have been granted access to all locker compartments in the system.

NOTE: The primary compartment is RFID, and the secondary compartment is non-RFID.

Application

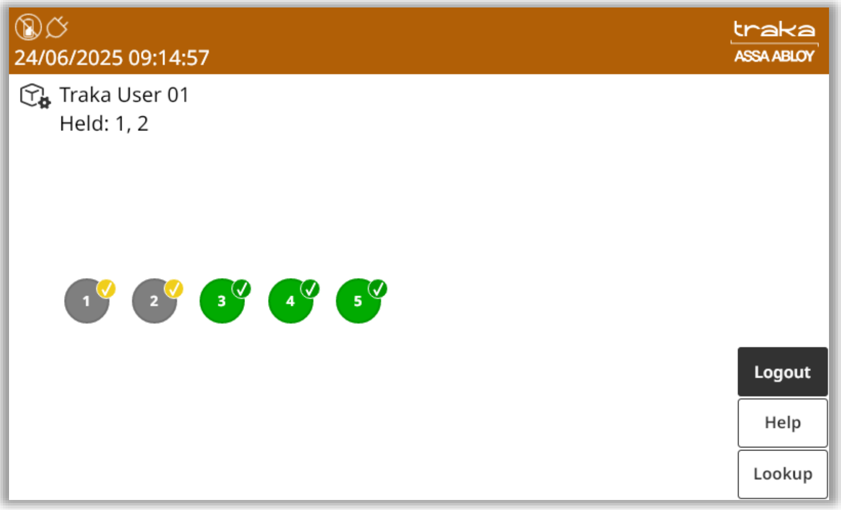
1. When Traka User 01 logs into the affected Traka Touch system, they can remove any item from it. In the example below, the primary item in Position 1 has been chosen.



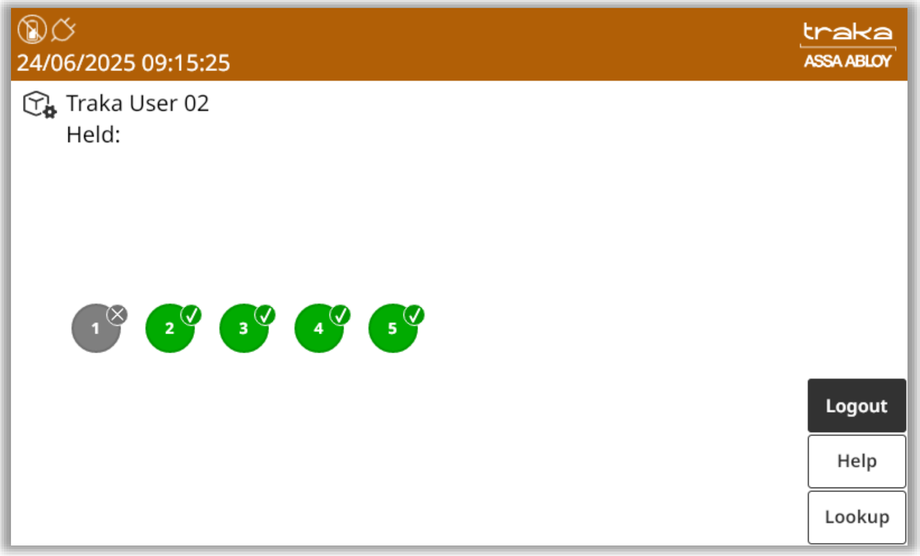
2. The moment position 1 is selected, the doors to both position 1 and position 2 will open.

NOTE: If a user has only been granted access to a primary item, then the secondary door will not open.

NOTE: The status of the system icons will not change until the items have been removed.

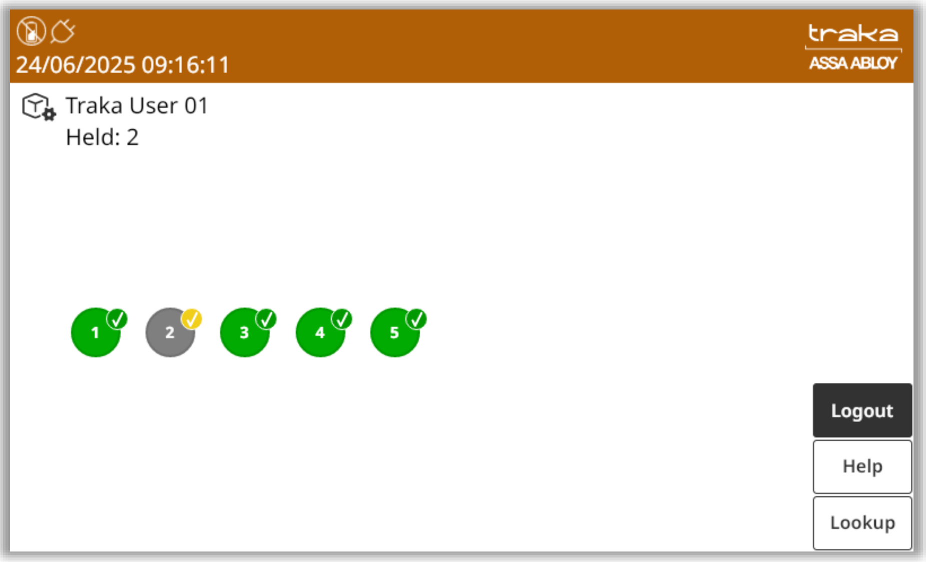


3. When Traka User 02 logs into the system, they will see that the primary item is no longer available, but the secondary items compartment can still be accessed.



4. Traka User 01 logs into the system again and returns the primary item to position 1, It then becomes available once again to both users.

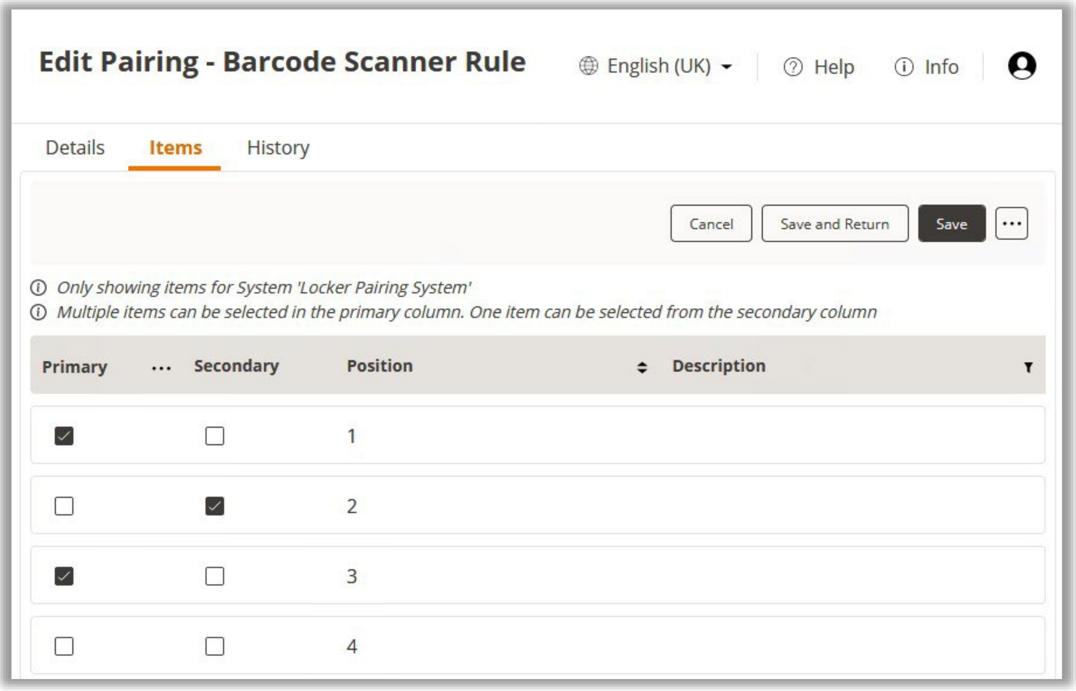
Should any users require another item from the secondary position, they may log in and select position 2. In this instance, only the door to position 2 will open. A primary item will still be available if required.



6.12.2.9 LOCKER PAIRING WITH MULTIPLE PRIMARY ITEMS

Setup

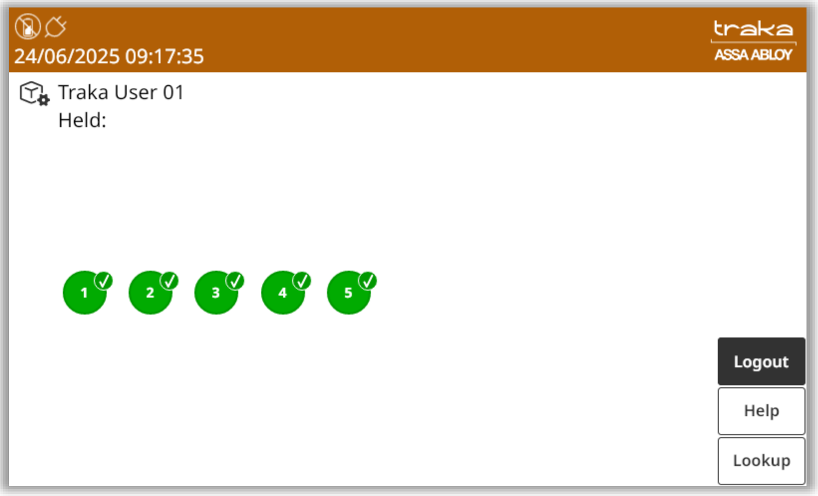
Locker Pairing with multiple primary items will allow more than one user to take a primary and secondary item from the locker system. In the example below, the following Pairing Rule has been created:



Positions 1 and 3 have been set to hold the primary items and position 2 has been set to hold the secondary items.

Application

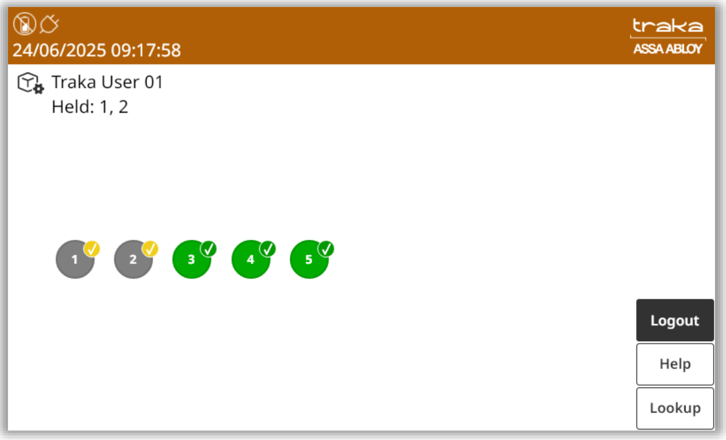
1. When Traka User 01 logs into the affected Traka Touch system, they can remove any item from it. In the example below, the primary item in Position 1 has been chosen.



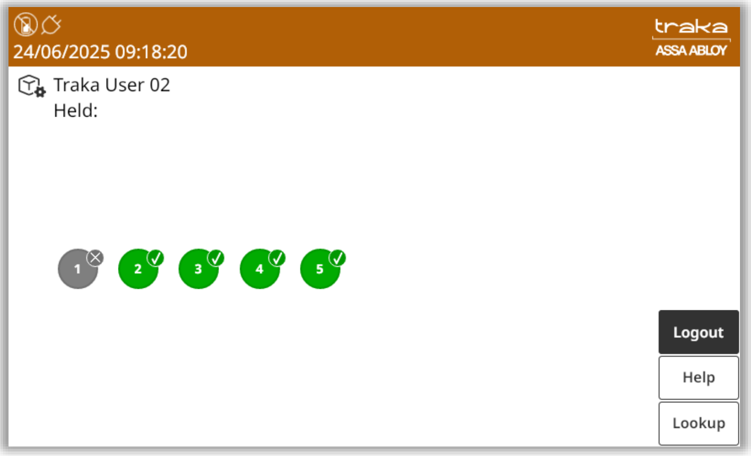
2. The moment position 1 is selected, the doors to both position 1 and position 2 will open.

NOTE: If a user has only been granted access to a primary item, then the secondary door will not open.

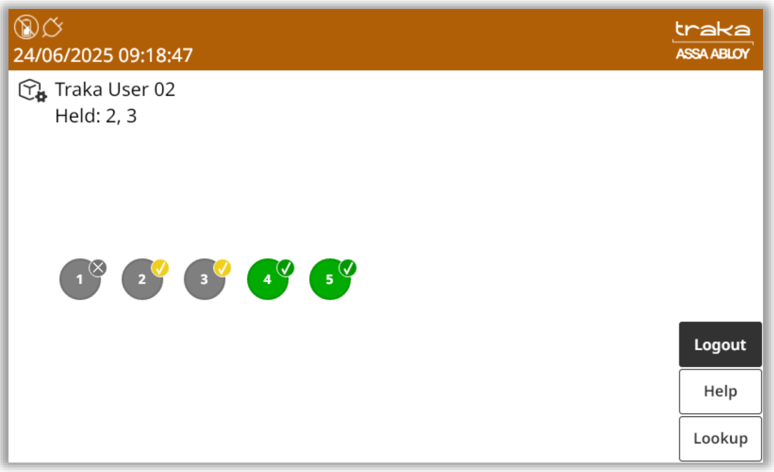
NOTE: The status of the system icons will not change until the items have been removed.



3. When Traka User 02 logs into the system, they will see that the primary item in position 1 is no longer available, but the primary item in position 3 is available and so too are the secondary items in position 2.



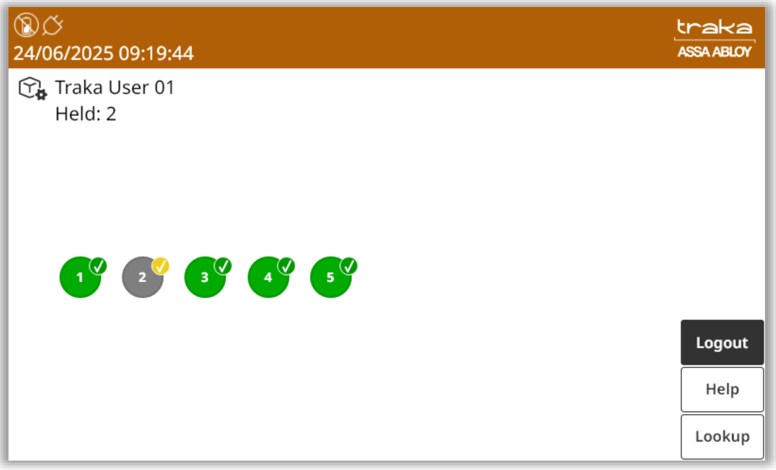
4. When User 2 selects position 3, the doors to both position 3 and position 2 will immediately open allowing the user access to the items. Once the items have been removed, the display icons will be displayed as shown.



Once both primary items have been taken, then only the secondary items in position 2 will be available.

Once all the items have been returned by both users, all primary and secondary items will once again be made available.

Should any users require another item from the secondary position, they may log in and select position 2. In this instance, only the door to position 2 open. A primary item will still be available if required.



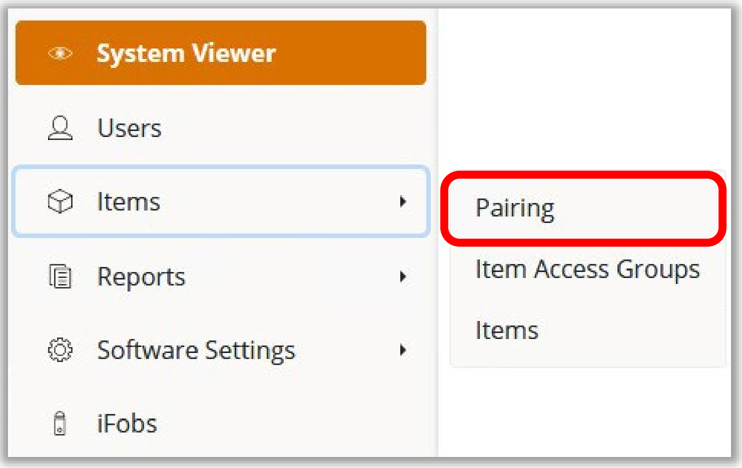
6.12.2.10 NO OVERRIDE FOR LOCKER PAIRING

Since the Locker Pairing is a security feature, for the safety of users and property there is no option available to grant users permissions to override the Locker Pairing.

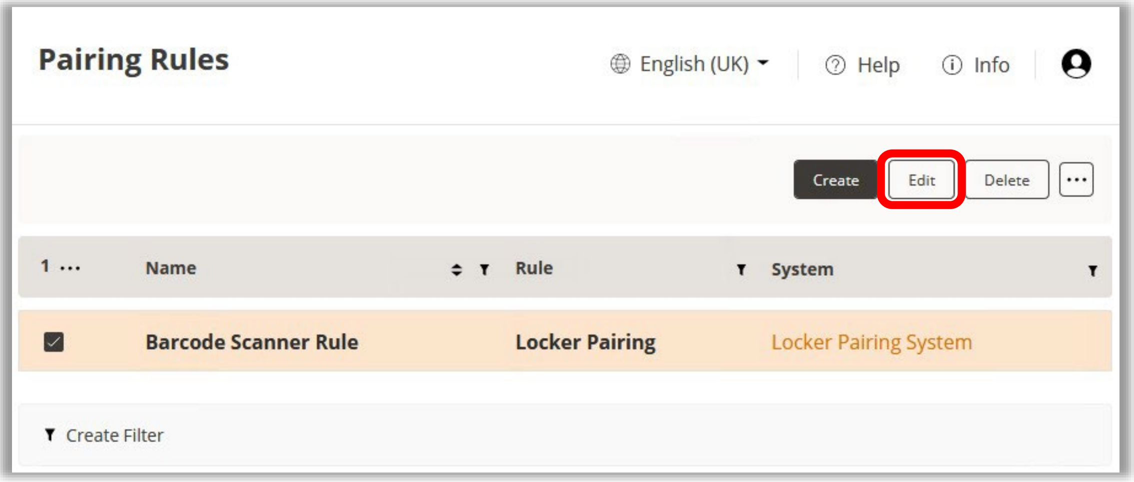
6.12.2.11 LOCKER PAIRING HISTORY

For the purposes of audit, all the changes in the Locker Pairing Rules are recorded in the History tab for each Item Pairing rule.

1. To access the History tab for your chosen Item Pairing Rule, select **Items** on the Navigation Menu. The menu will expand and reveal the **Pairing** sub-menu:

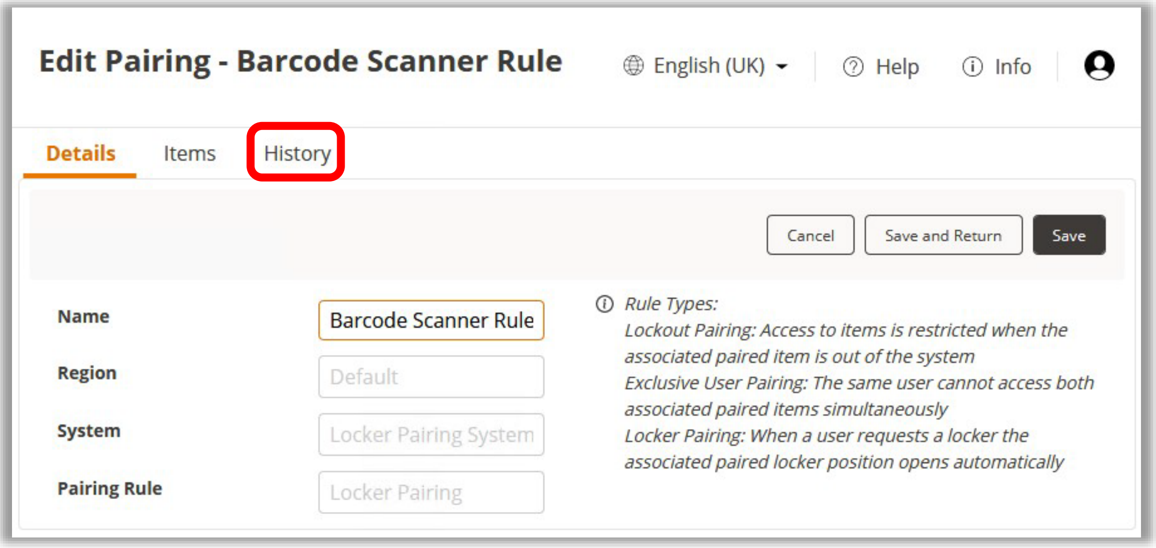


2. TrakaWEB will then display all the current Item Pairing rules that exist within the database. Select one of the existing Item Pairing rules and either click on **Edit** on the Ribbon menu or double-click on the selected rule to start editing it.

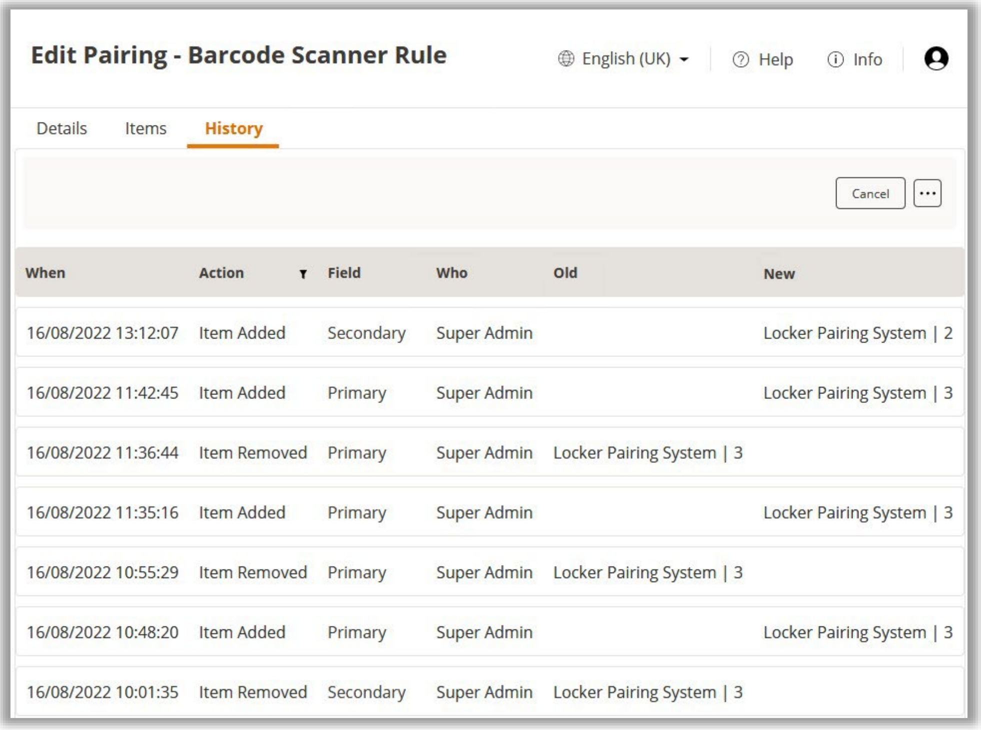


You will be redirected to the Edit Pairing **Details** page.

3. Select the **History** tab.



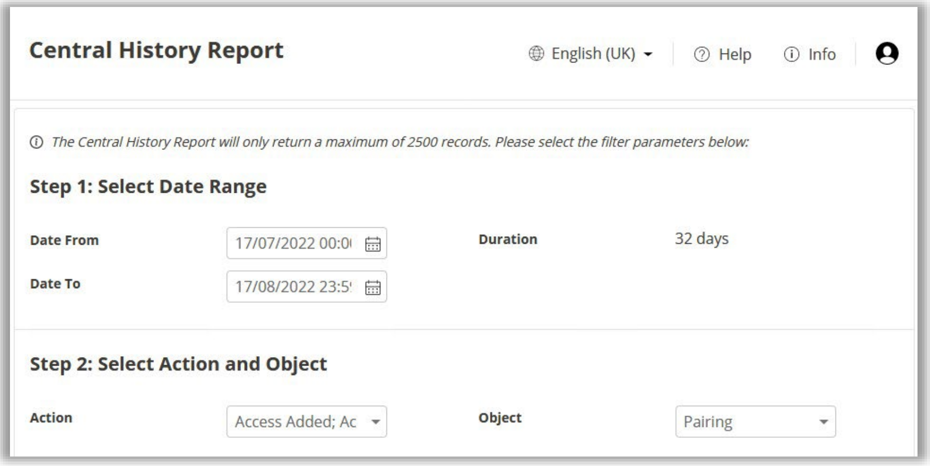
You will then see the recorded history of all the changes to that Locker Pairing Rule.

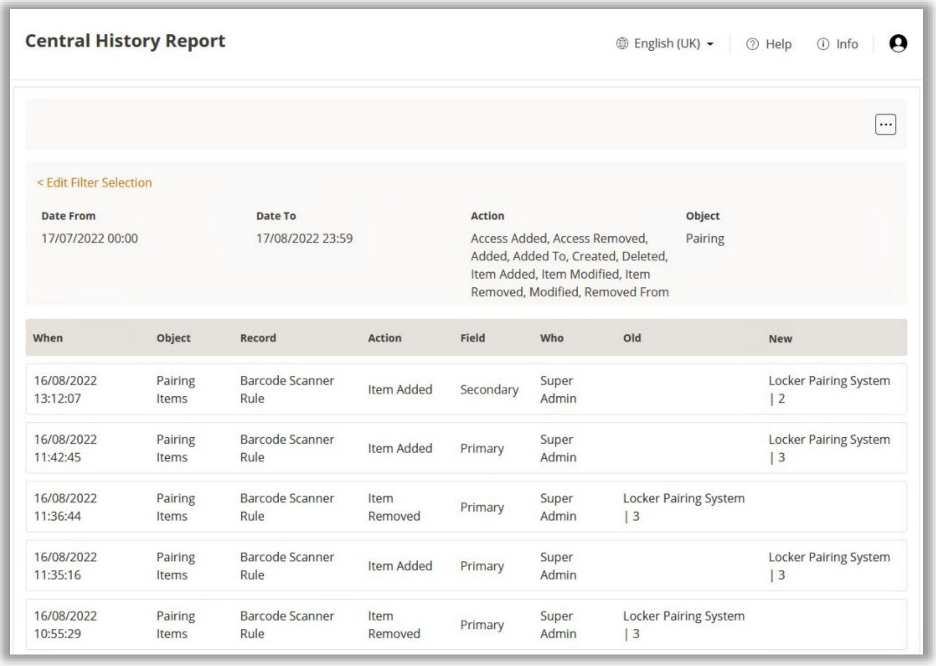


When	Action	Field	Who	Old	New
16/08/2022 13:12:07	Item Added	Secondary	Super Admin		Locker Pairing System | 2
16/08/2022 11:42:45	Item Added	Primary	Super Admin		Locker Pairing System | 3
16/08/2022 11:36:44	Item Removed	Primary	Super Admin	Locker Pairing System | 3	
16/08/2022 11:35:16	Item Added	Primary	Super Admin		Locker Pairing System | 3
16/08/2022 10:55:29	Item Removed	Primary	Super Admin	Locker Pairing System | 3	
16/08/2022 10:48:20	Item Added	Primary	Super Admin		Locker Pairing System | 3
16/08/2022 10:01:35	Item Removed	Secondary	Super Admin	Locker Pairing System | 3	

6.12.2.12 LOCKER PAIRING IN TRAKAWEB REPORTS

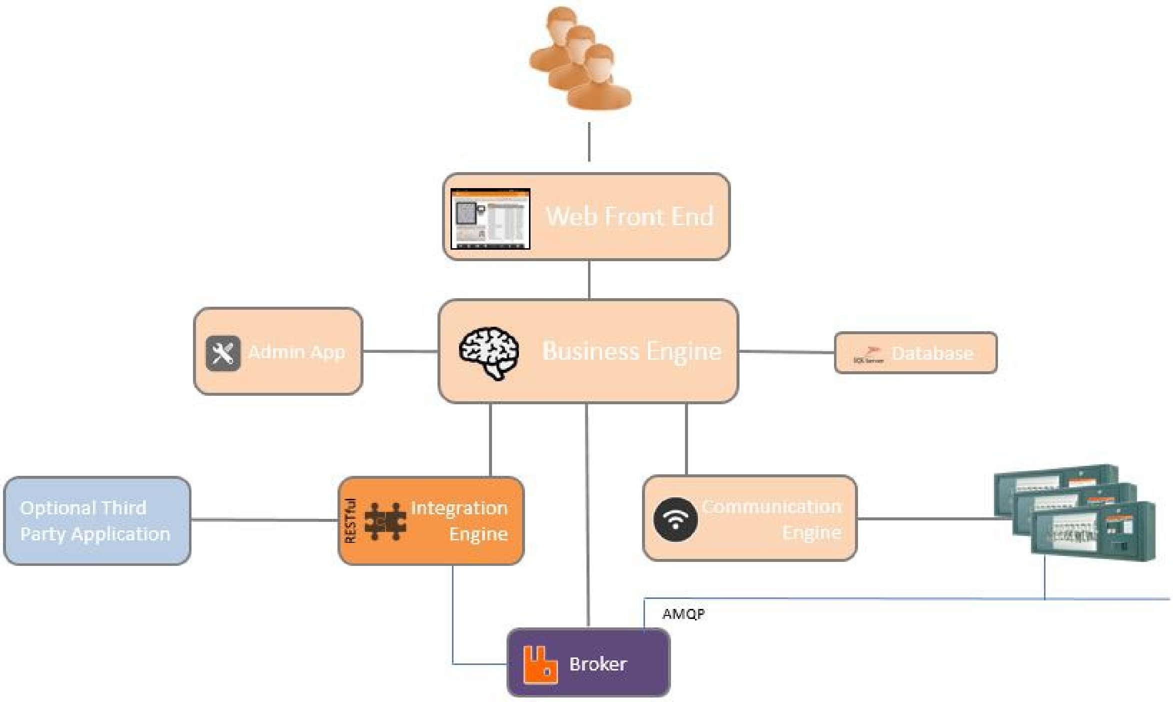
All the events related specifically to the Locker Pairing Rules will be visible in the Central History Report. You can also create a Central History Report and specifically choose **Pairing** as the Object for the report. To read more on how to generate such a report, please refer to the General Reports section in this document.





6.13 REAL-TIME UPDATE SERVICE (RTUS)

The Real-Time Update Service is a cost option feature that will provide Real-Time State Change information from Traka Touch to the Integration Engine v2 using a Message Broker on a system-by-system basis.



This in turn will provide events in real-time to a third-party application based upon the current status of the items held by the user which in turn can grant or revoke access rights to or from a user within a third-party application when Item State Changes are detected via RTUS. An example could be, preventing a user from leaving site if they have not returned keys or assets.

The Comms status is monitored continually, and email notifications can be sent if one or more components that make up RTUS should fail. For example:

- The Traka Touch System goes offline
- The Message Broker goes offline
- The Integrated Engine v2 goes offline

RTUS will work with the following products:

- Traka Touch Key Cabinets (locking & non-locking strips)
- Traka Touch Lockers with RFID
- Traka Touch Lockers with RFID & FIFO
- Other optional features such as Fault Logging, Fuel, Distance & Location Logging, Item Booking

RTUS is not compatible with 16bit Systems or Traka Touch Lockers without RFID.

For more information regarding the setup and configuration of RTUS, please refer to **TD0165 – Real Time Update Service Setup & Configuration Guide.**

6.14 SCHEDULED REPORTS

6.14.1 SCHEDULED REPORTS OVERVIEW

The Filtered Reports/Scheduled Reports is a non-cost option feature that may be setup by the user as required. A Filtered Report can be configured by the end-user and then combined with the Scheduled Reports feature.

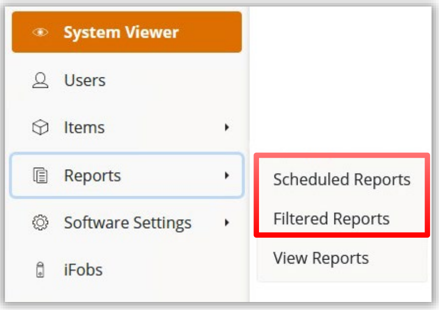
A maximum of 500 reports maybe created, and once configured, the Scheduled Report can be submitted as an email notification in either PDF or Excel format.

The Email notification will need to be configured in the Business Engine before it is usable in TrakaWEB. For detailed information on how to configure this, please review the 'Email Configuration' section in the latest version of the **TrakaWEB Installation & Configuration Guide – TD0013 and TD0216 – TrakaWEB Version 4 Installation & Configuration Guide.**

For more information on the setup and configuration of Scheduled Reports, please refer to **TD0013 – TrakaWEB Installation & Configuration Guide and TD0216 – TrakaWEB Version 4 Installation & Configuration Guide.**

Whilst both Filtered and Scheduled Reports may be configured separately, both will be required to be effective. They also both have their own individual permissions in the Software Permissions Groups.

The option for selecting both Filtered Reports and Scheduled Reports is located on the Navigation Menu within the Reports tab.



The Scheduled Reports feature may be configured to periodically submit Filtered Reports by email. Examples include:

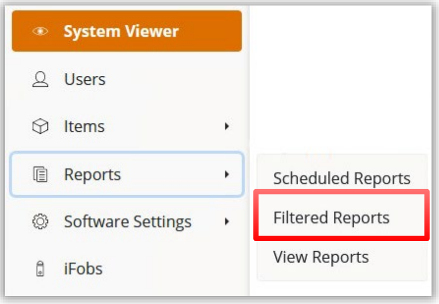
- Current Item Status Reports
- Activity Reports
- Overdue Reports
- Curfew Item Status Reports

Whilst Scheduled Reports requires many of the same installation requirements as RTUS, the Integration Engine is not used, but an additional Reporting Engine is provided with the installation files.

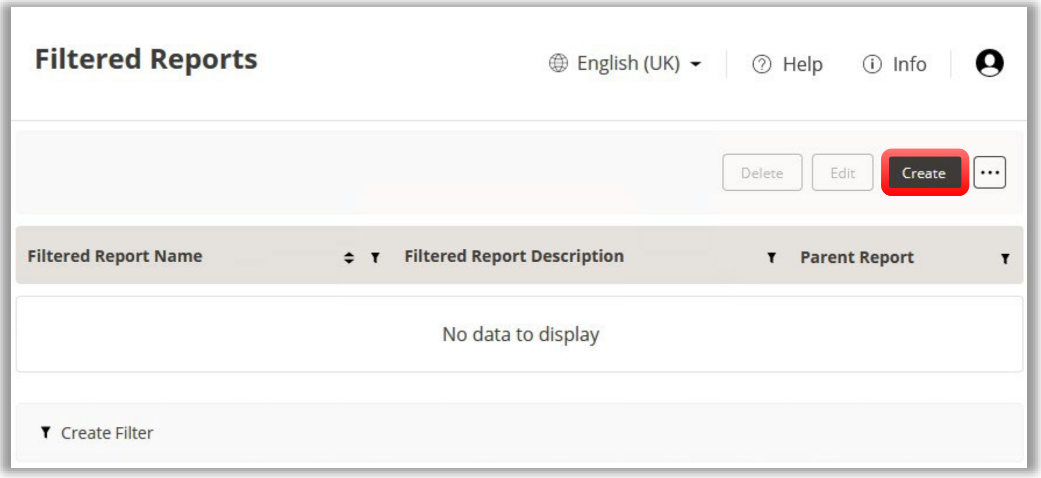
6.14.2 FILTERED REPORTS

Filtered Reports are configured separately from Scheduled Reports, they will however require a Scheduled Report to be created for submission. Configuration of Filtered Reports is divided into 7 steps.

1. To create a Filtered Report. Select **Filtered Reports** from the Reports tab in the Navigation Menu.



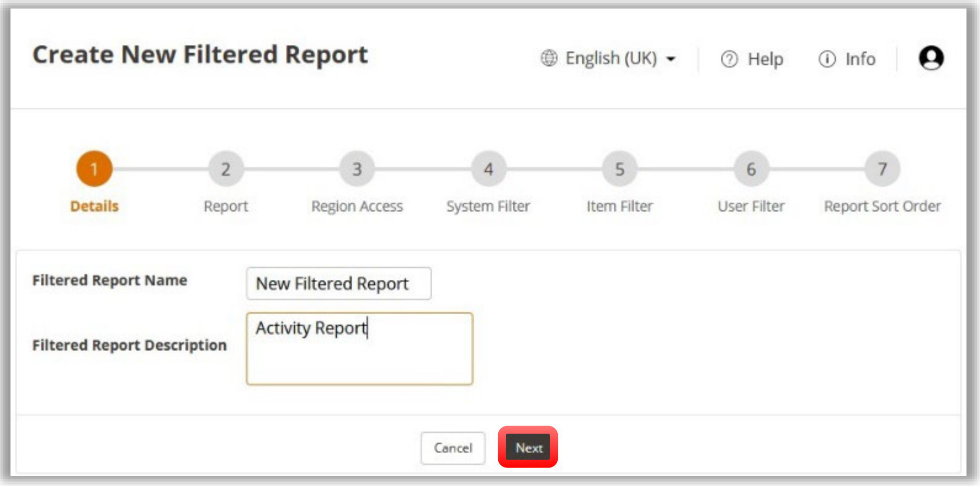
You will now be taken to the Filtered Reports Landing Page.



2. To create a new Filtered Report click **Create** on the Toolbar.

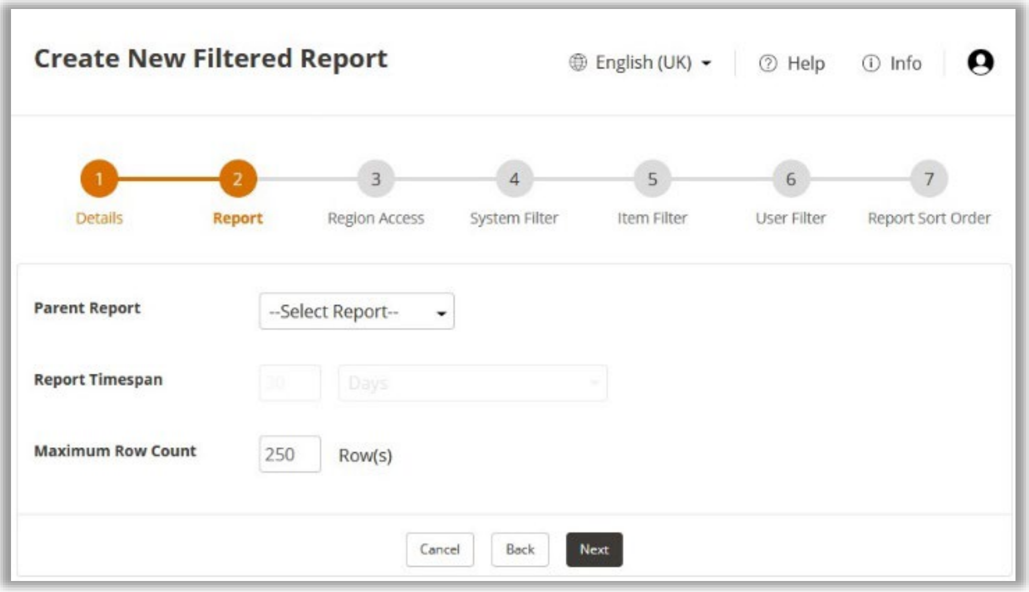
Step 1 –Details

3. At the **Details** page, complete the details as shown in the example below. Once completed, click on **Next**.

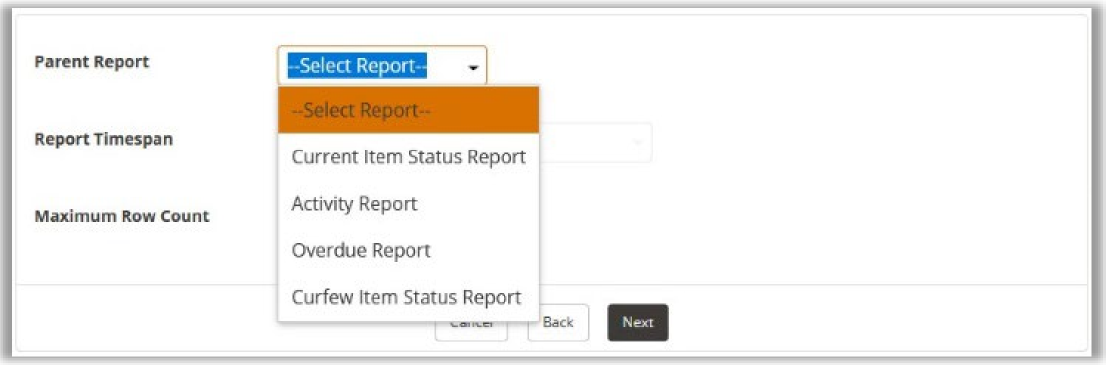


Step 2 - Report

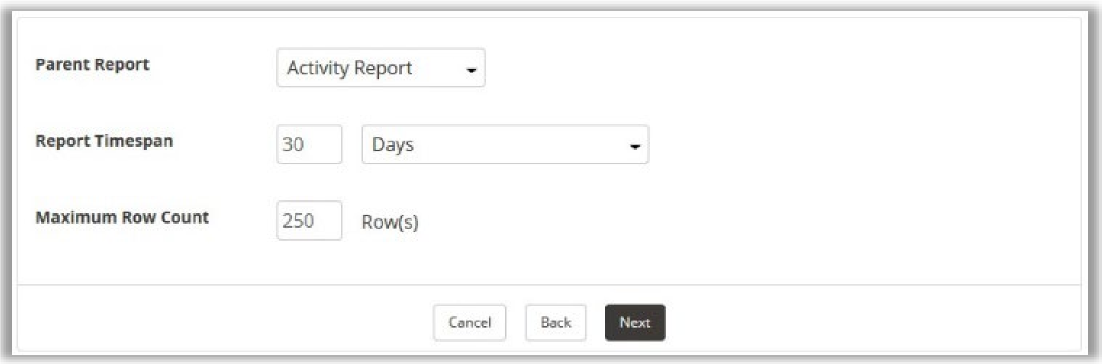
The next step will require you to select the **Parent Report** and the **Report Timespan** as well as the **Maximum Row Count.**



4. From the drop-down menu, select the required report.



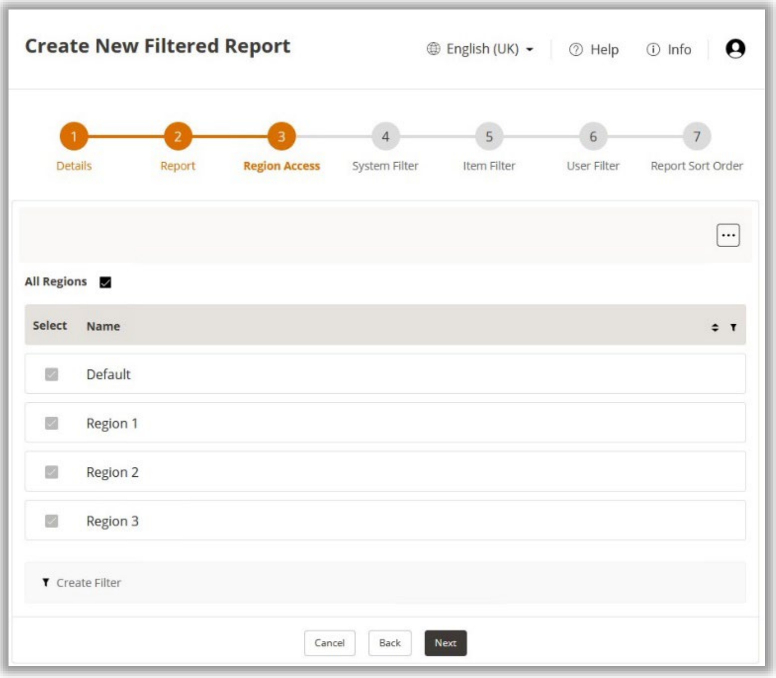
5. Next, insert a value for the **Report Timespan**. The default is set to 30 days. The timespan may also be changed from days to hours as required. You also have the option to set a maximum row count. The default is set to 250 rows.



6. Once you have made your selection, click on **Next** to continue.

Step 3 - Regions

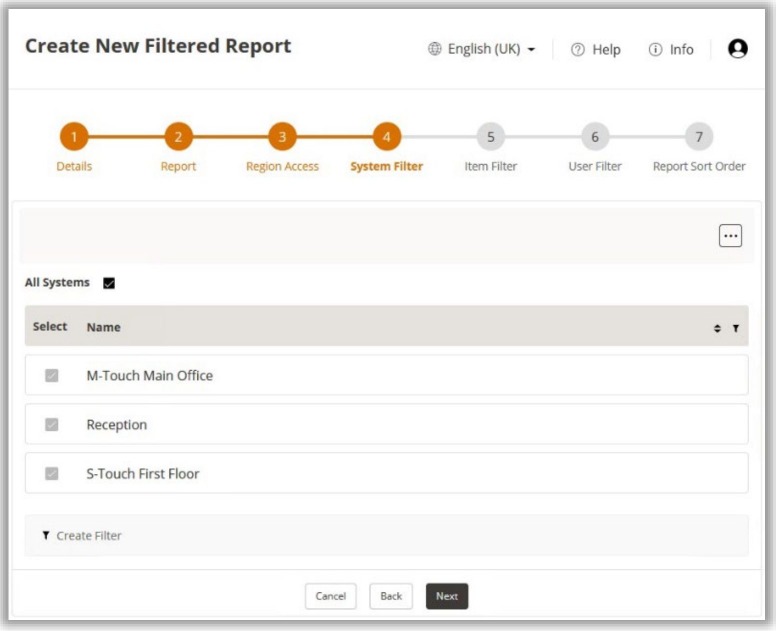
The next step will require you to select from your list of available regions. These may be selected individually or all at once by clicking on the **All Regions** checkbox as shown below.



7. Once you have completed your region selection, click on **Next** to continue.

Step 4 – System Filter

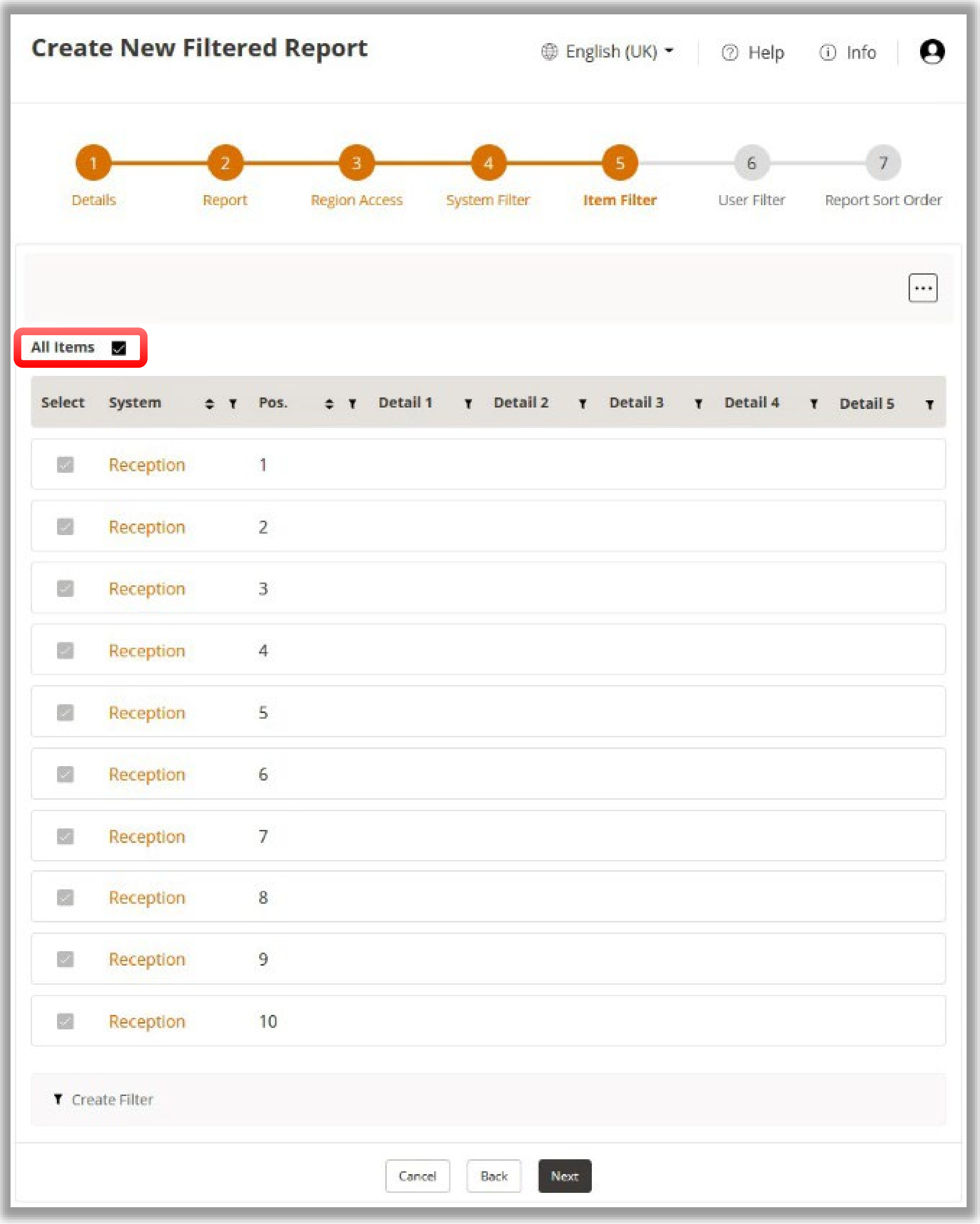
At the next page, you will be required to select from the list of available systems. These may be selected individually or all at once by clicking the **All Systems** checkbox as shown.



8. Once you have selected the required systems, click on **Next** to continue.

Step 5 – Item Filter

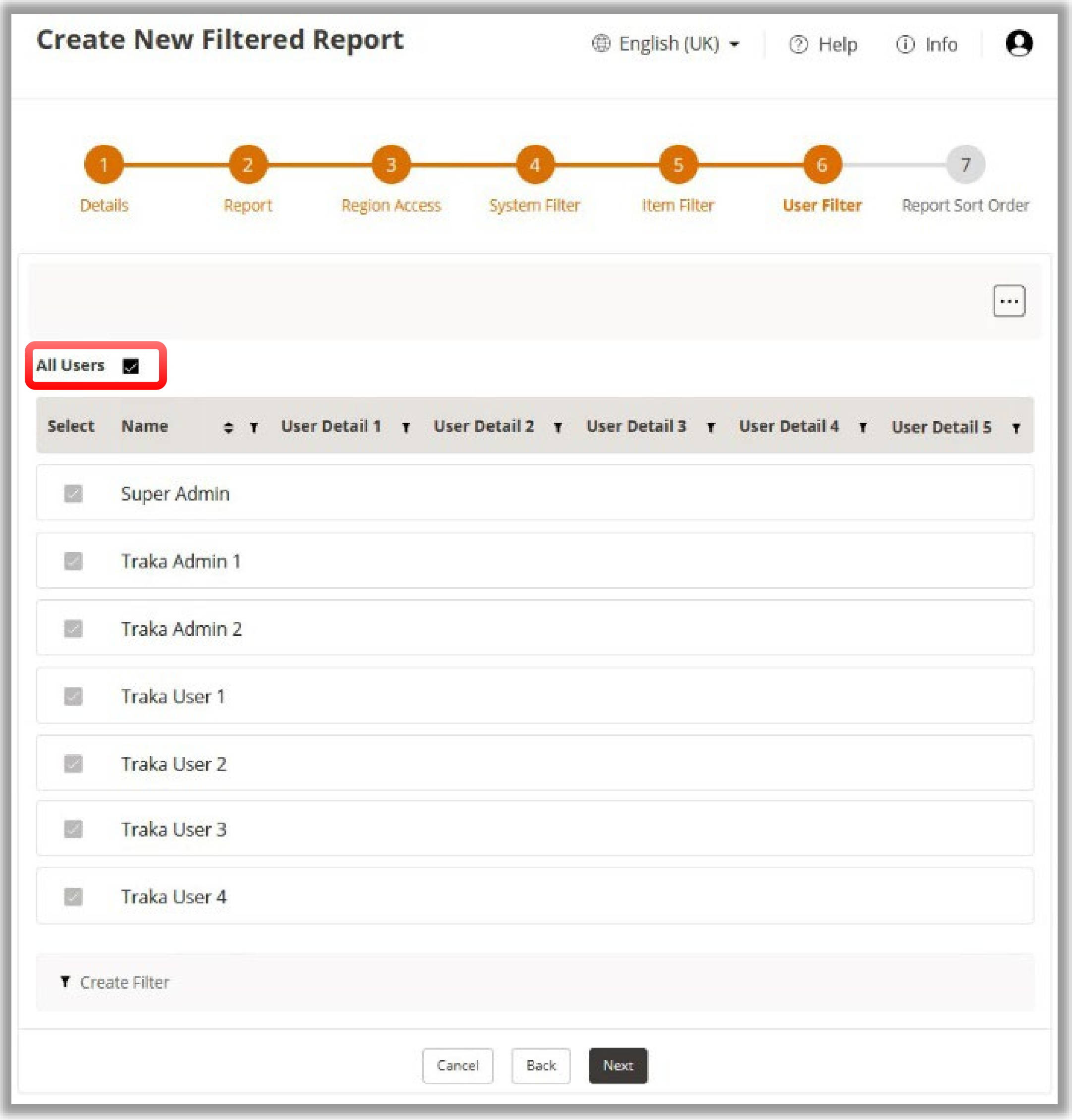
The next page will require you to choose which items you wish to add to the filter. All the items for the selected system/s will be displayed. These may be selected individually or all at once by clicking the **All Items** checkbox as shown.



9. Once you have selected the required items, click on **Next** to continue.

Step 6 – User Filter

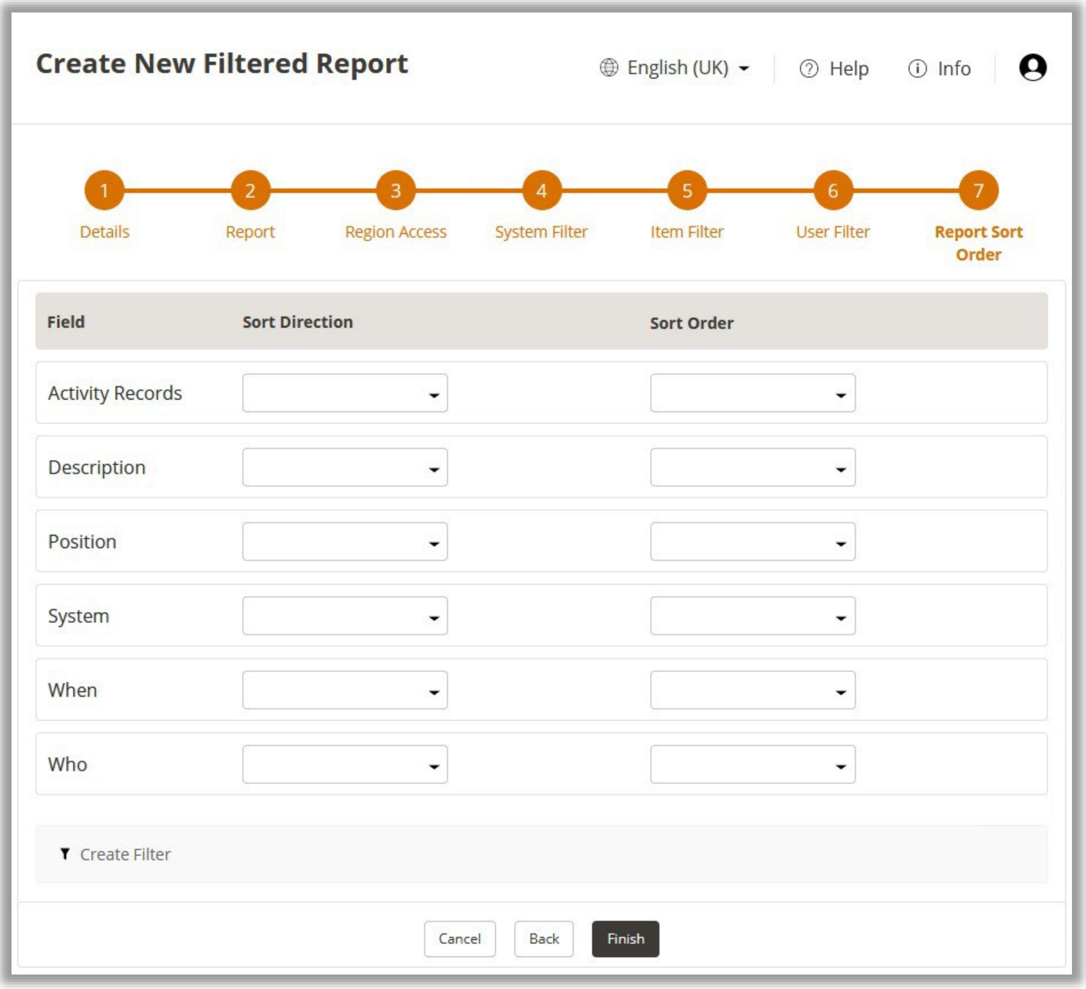
At the **User Filter** page, you will be required to select from the list of available users. All users for the selected system/s will be displayed. These may be selected individually or all at once by clicking the **All Users** checkbox as shown.



10. Once you have completed the User selection, click on **Finish** to complete the process.

Step 7 – Report Sort Order

The **Report Sort Order** page will enable you to arrange the filtered report according to your requirements. It comprises of 2 customisable sections based on the selections made in the previous steps.

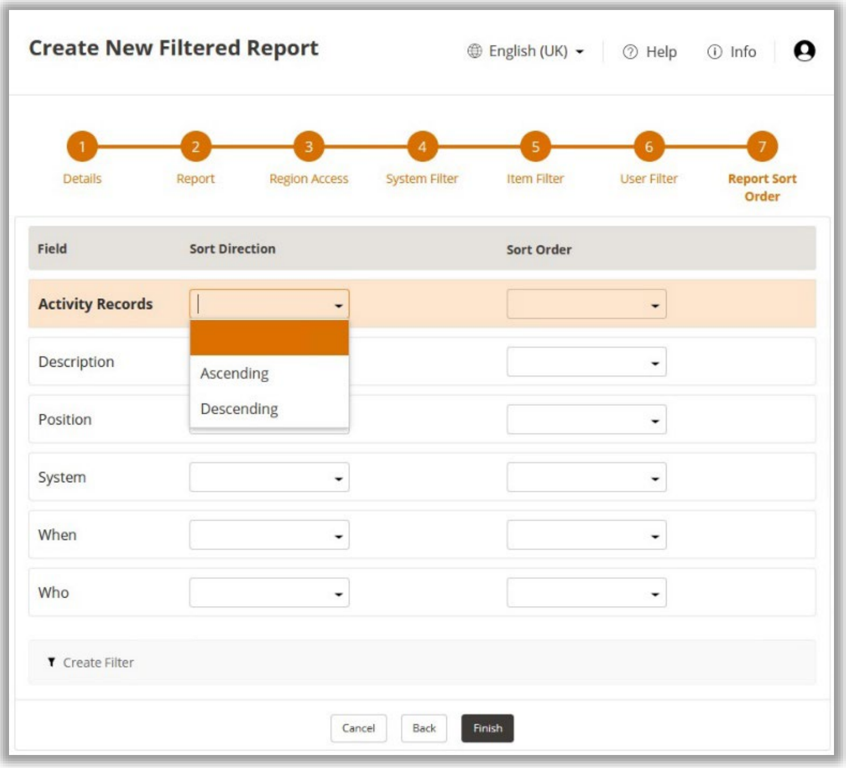


Field

The Field comprises of a list of 6 report options. These are based on the Filtered Report chosen in step 2.

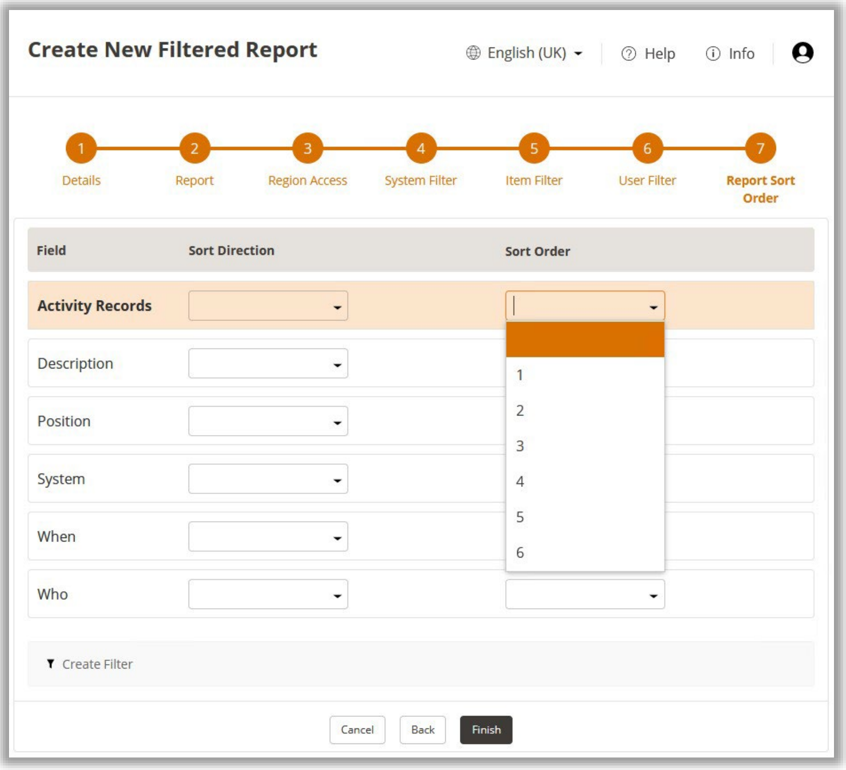
Sort Direction

The Sort Direction will enable you to choose between ascending and descending from the drop-down menus.



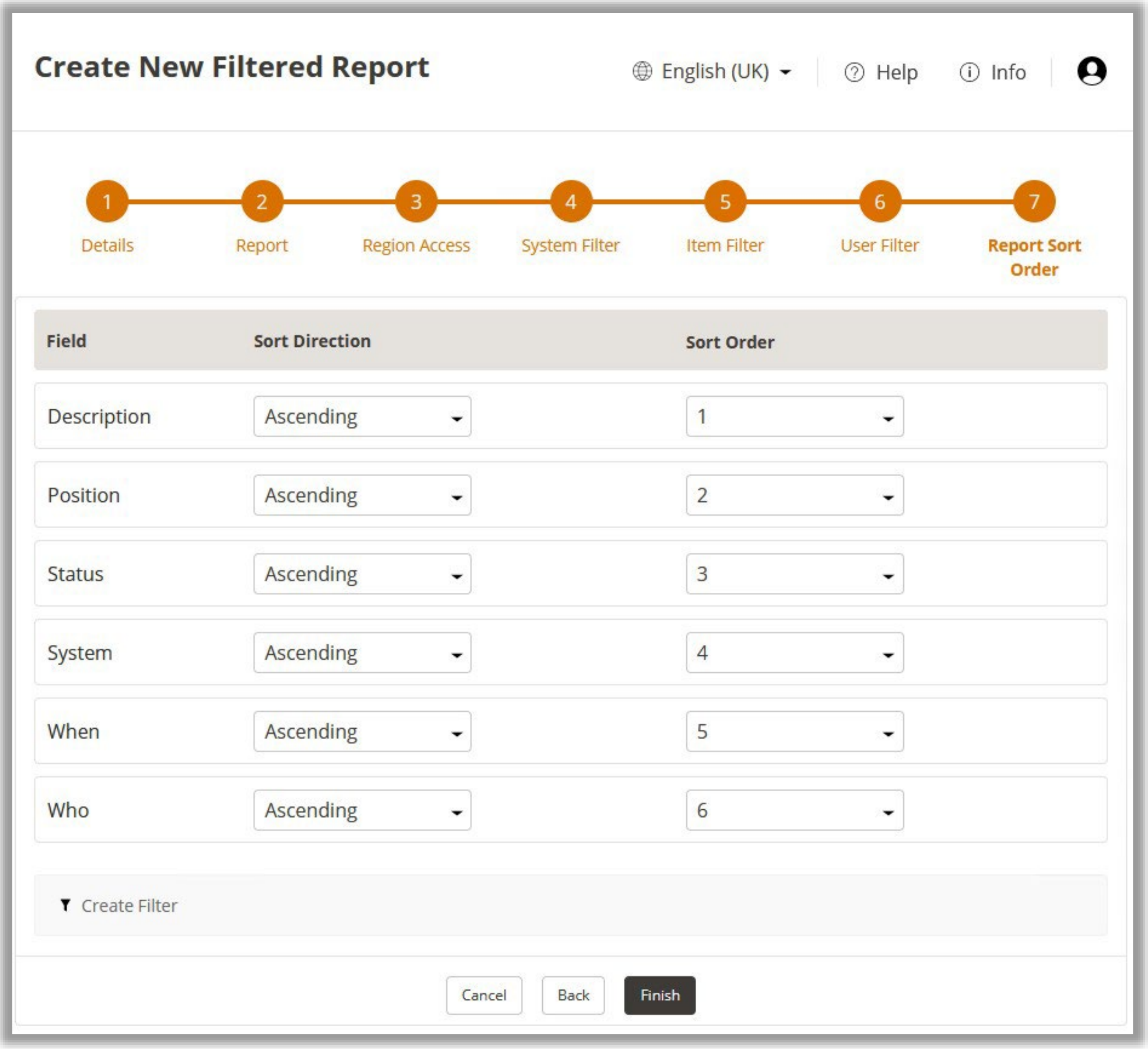
Sort Order

The Sort Order will enable you to set the order that you would like the report to be presented. From the drop-down menus, you can change the number value from between 1 – 6.

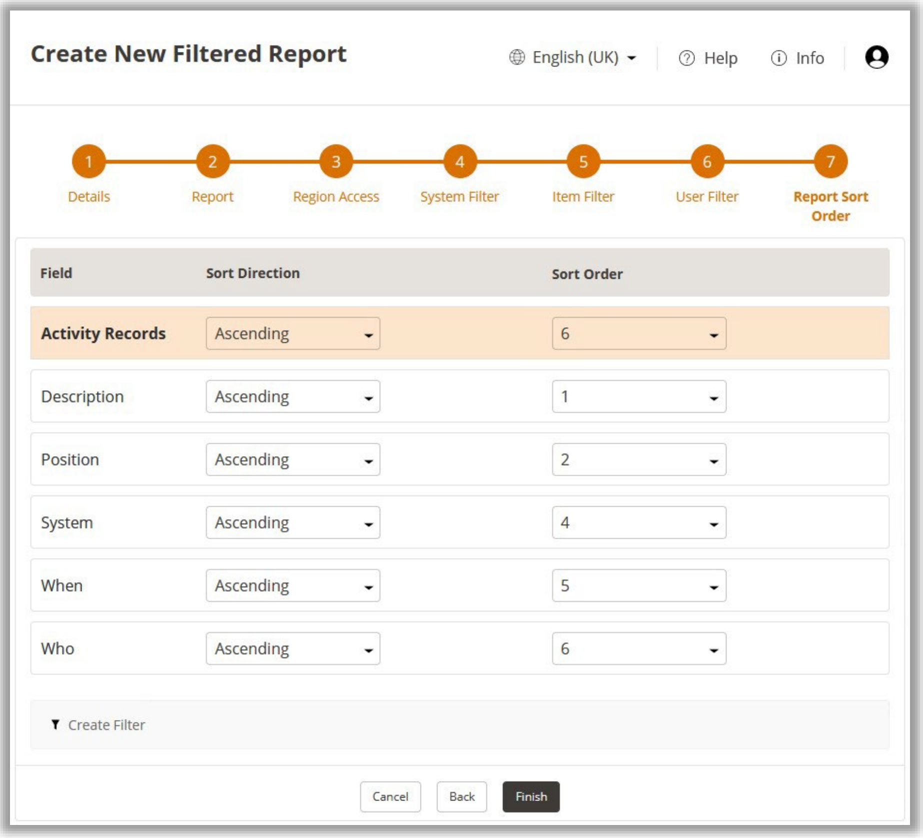


The following examples typically show the Field options based on the available selected Filtered Report options.

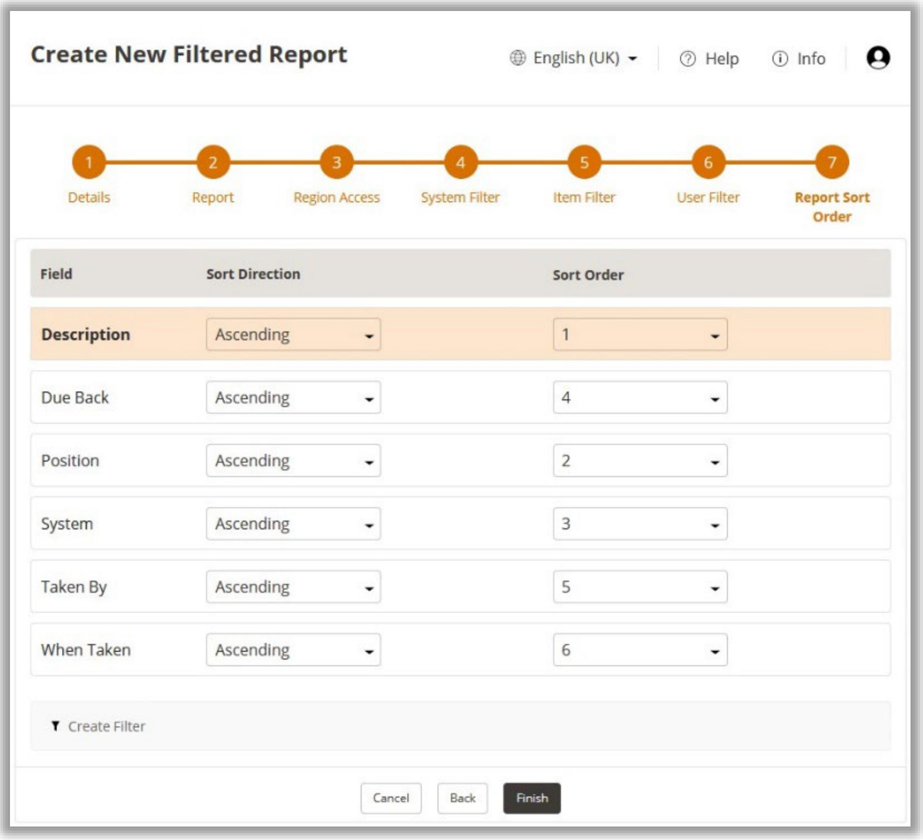
Current Item Status Report



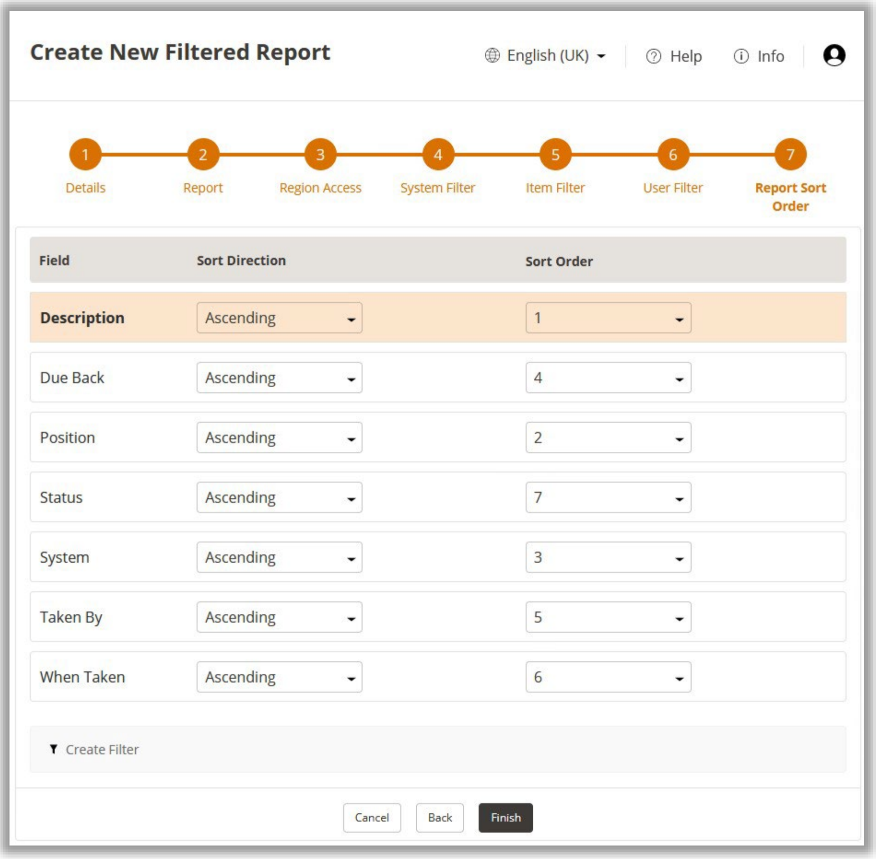
Activity Report



Overdue Report



Curfew Item Status Report

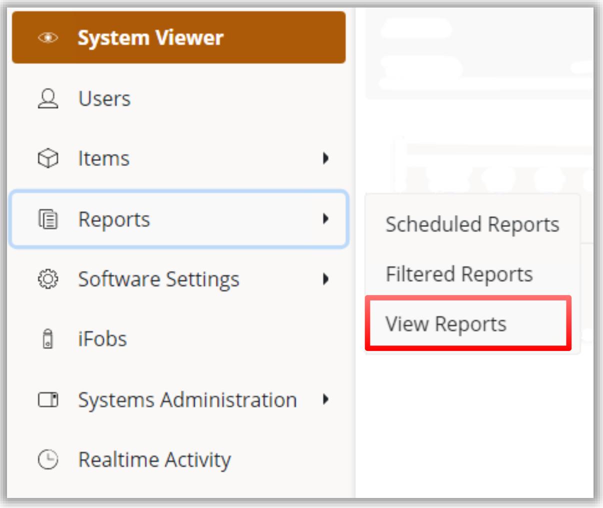


11. Once you have finished editing the Sort Order, click on the **Finish** button.

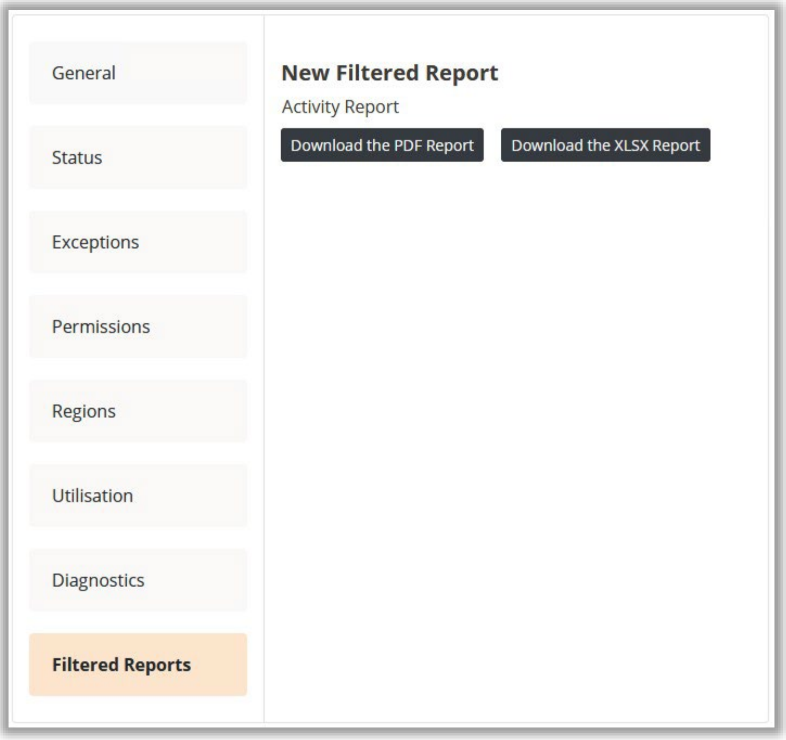
6.14.3 GENERATING A FILTERED REPORT

Once created, it is possible to generate a Filtered Report, which may be downloaded as a PDF or an Excel spreadsheet. The default number of rows is set to 250. Users can however choose between 1 and 5000 as required.

1. From the Navigation Menu, select **View Reports** from the **Reports** menu.



2. At the **Reports** page, select the **Filtered Reports** tab.

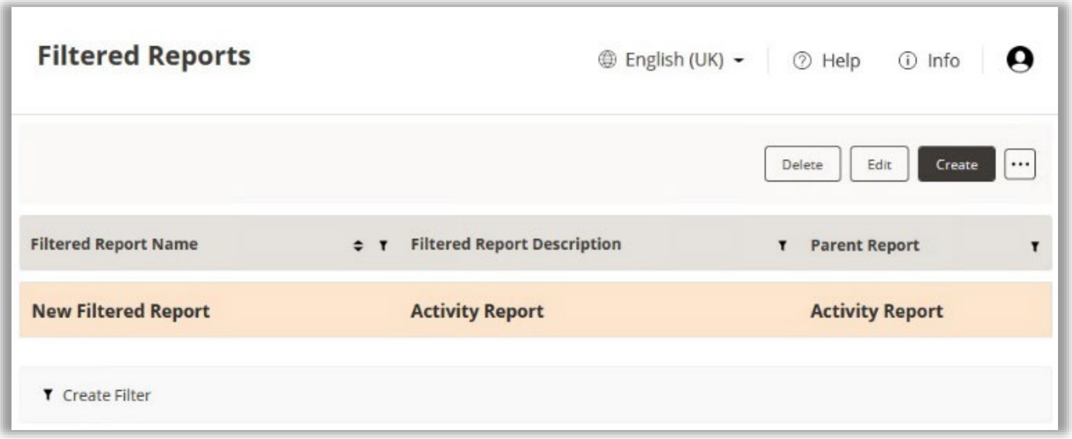


3. Next, choose the required Filtered Report and select the required download option.

6.14.4 EDITING A FILTERED REPORT

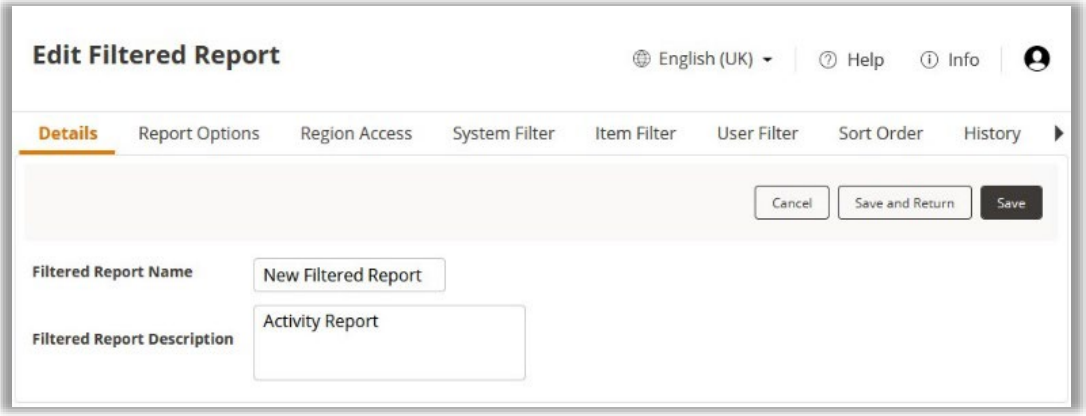
NOTE: If the Filtered Report is associated to a Scheduled Report, it cannot be deleted.

1. Navigate to the Filtered Reports page and select the Filtered Report you wish to edit.

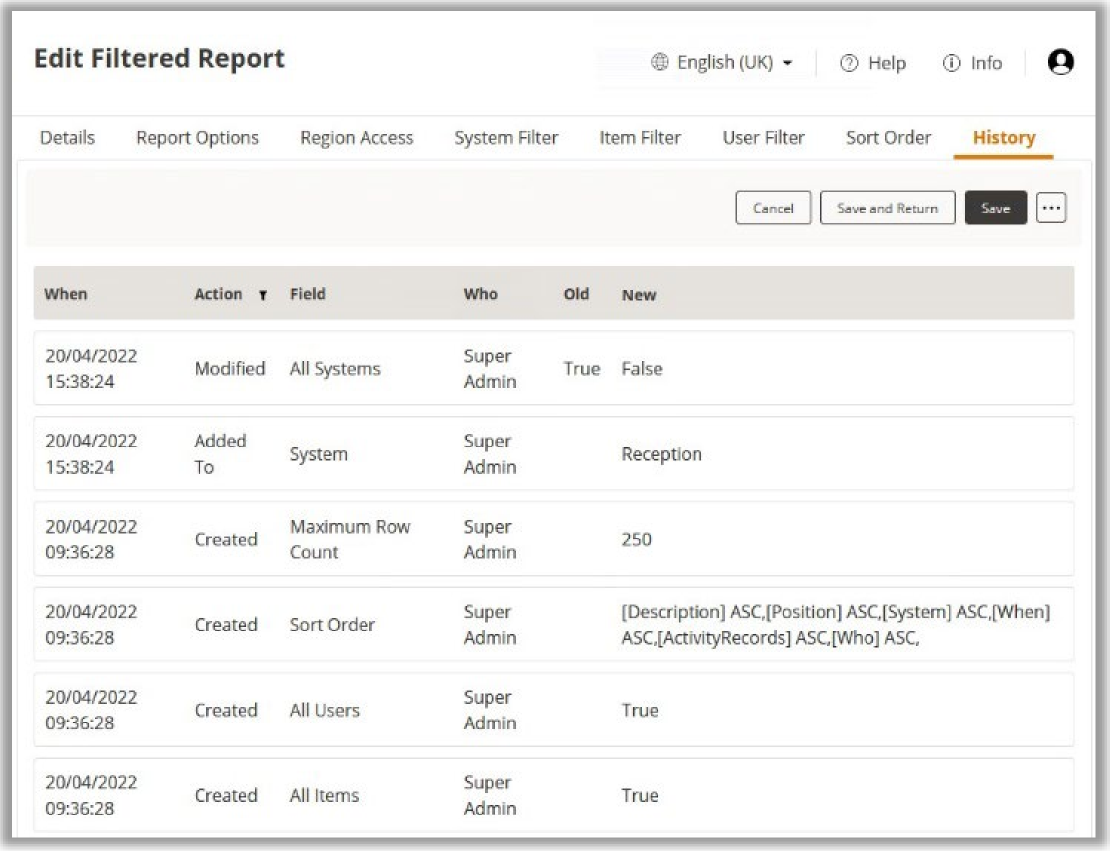


2. Either double click on the chosen Filtered Report or click on the **Edit** button on the Toolbar.

This will enable you to navigate through the previous steps and edit any required information.

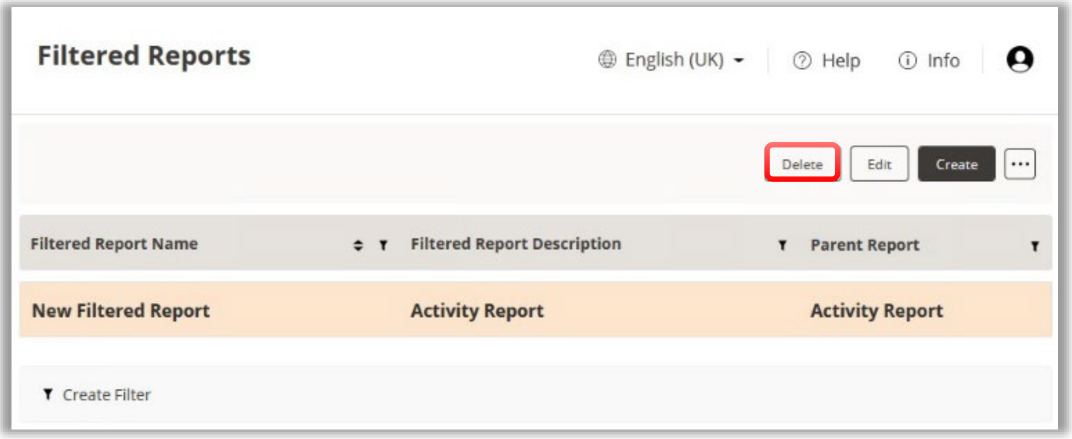


NOTE: A History tab is also available to show an audit of any changes.

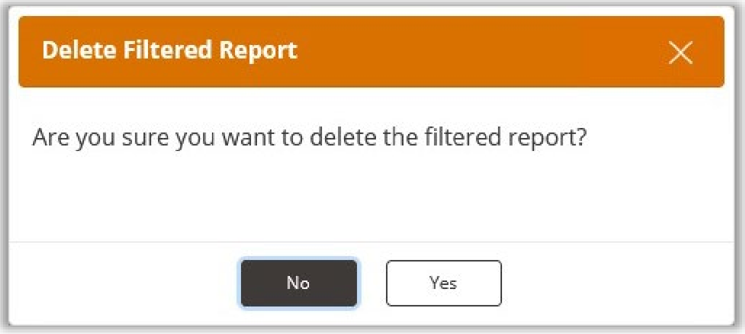


6.14.5 DELETING A FILTERED REPORT

1. Select the Filtered Report you wish to delete and then click on the **Delete** button located on the Toolbar.



A message will then appear requesting confirmation that you wish to delete the Filtered Report.

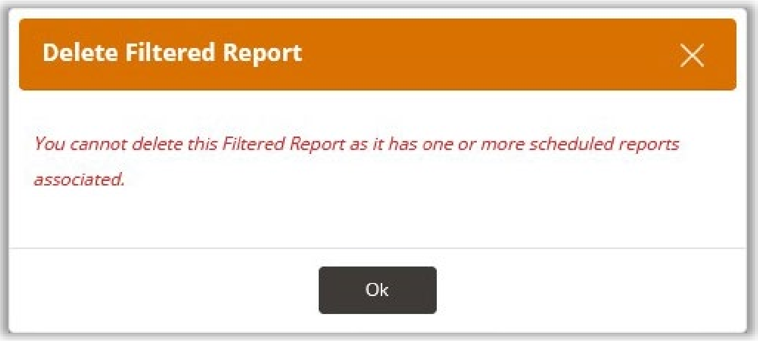


2. Click on **Yes** to remove the Filtered Report.

The Filtered report will then be removed.

NOTE: If the Filtered Report is associated with a Scheduled Report, it cannot be deleted.

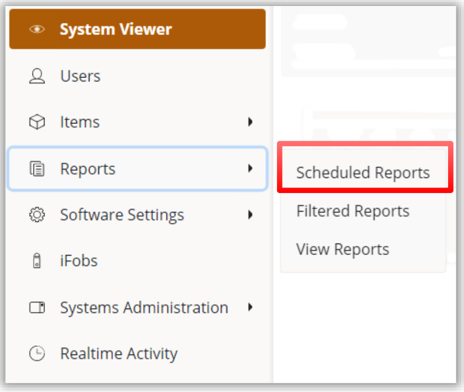
In this instance, you will be required to delete the associated Scheduled Report first, before the filtered report can be deleted.



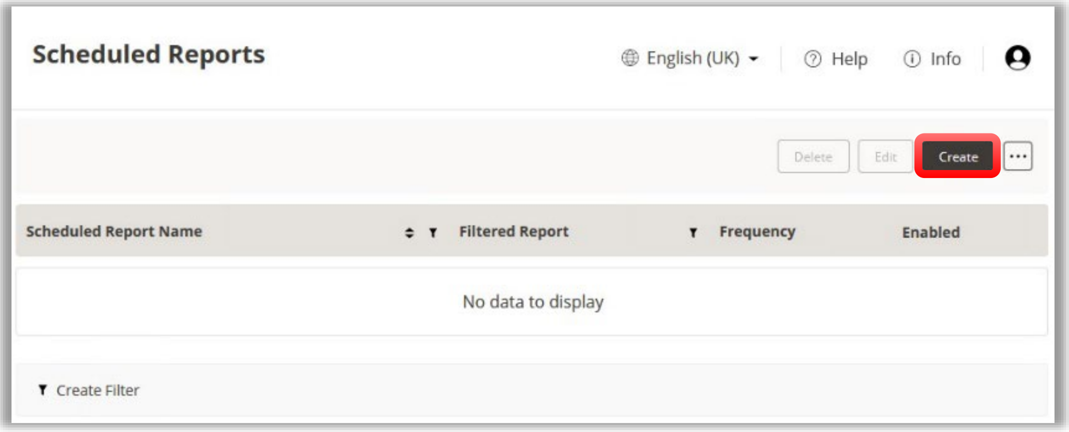
6.14.6 SCHEDULED REPORTS

Scheduled Reports can be configured separately from Filtered Reports, whilst they can be created and submitted, they will not display any information without the Filtered Report content. The configuration of Scheduled Reports is divided into 5 steps.

1. To create a Scheduled Report. Select **Scheduled Reports** from the Reports tab on the Navigation Menu.



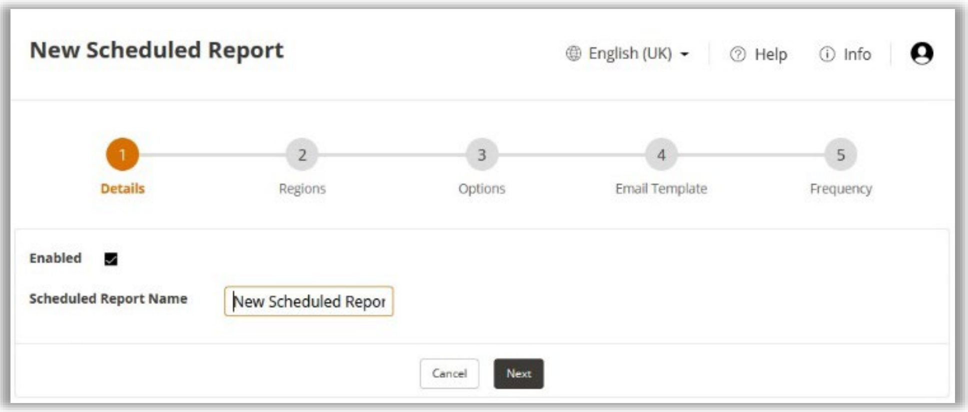
You will now be taken to the Scheduled Reports Landing Page.



2. To create a new Scheduled Report, click on the **Create** button located on the Toolbar.

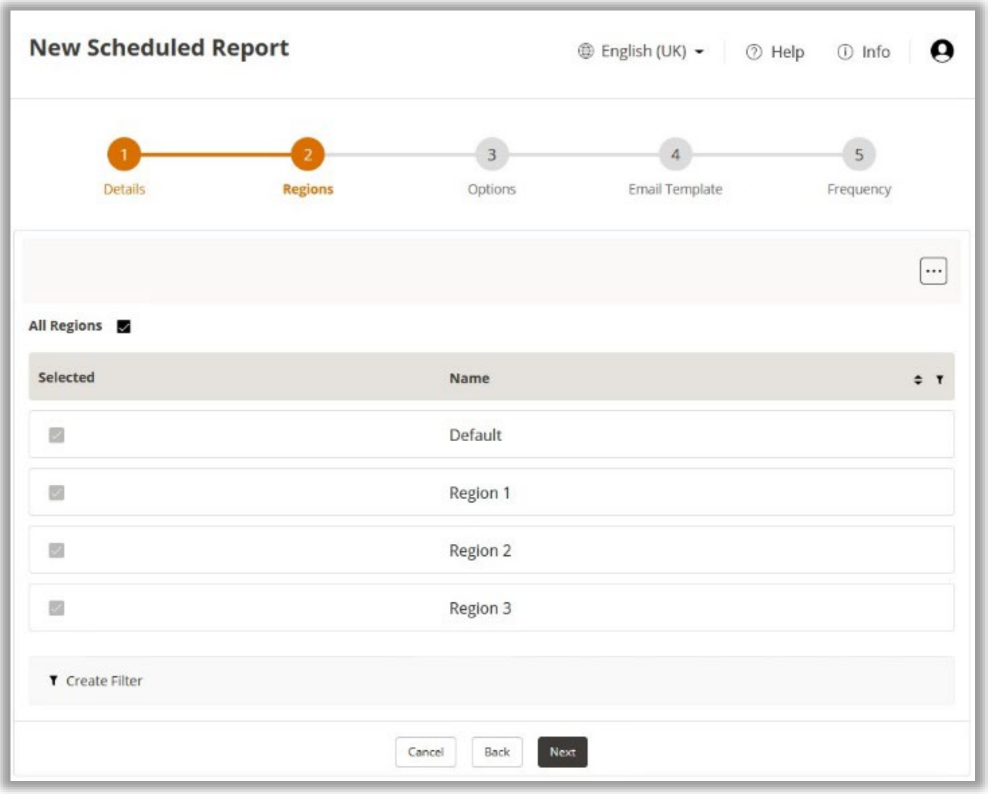
Step 1 – Scheduled Report Details

3. At the **Scheduled Report Details** page, insert a name for the new scheduled report. By default, the **Enabled** check box will be ticked. This will determine if the current Scheduled Report will be active. Once completed, click on **Next.**



Step 2 – Scheduled Report Regions

4. At the next page, you will be required to select the regions for the Scheduled Report. By default, all available regions will be selected.

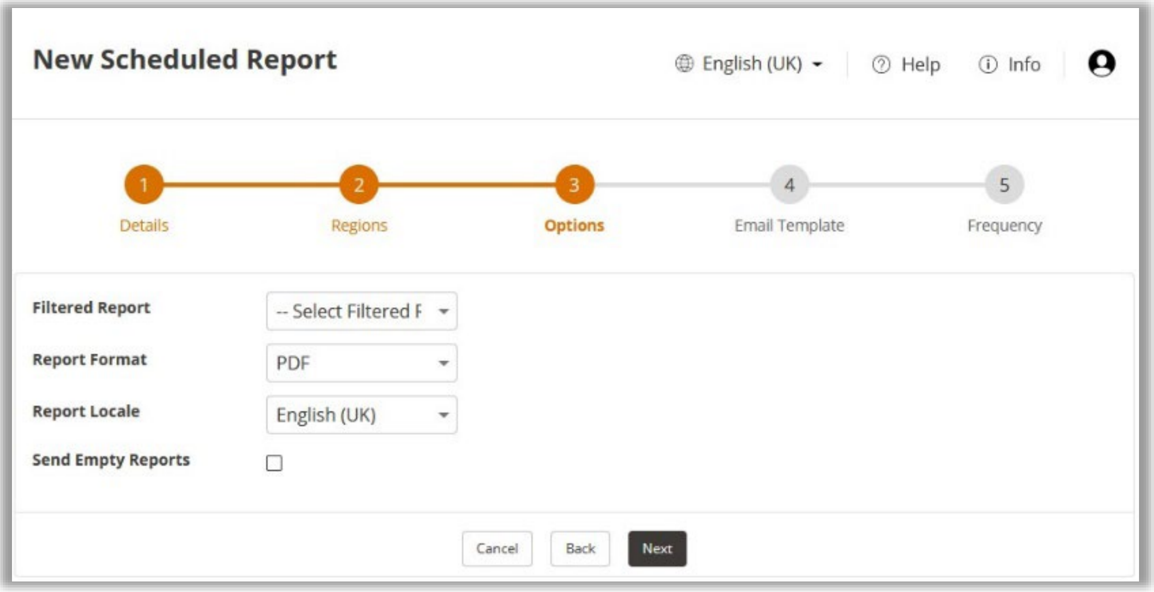


NOTE: Unchecking the 'All Regions' checkbox will enable you to select the regions individually.

5. Once you have made your selection, click on **Next** to continue.

Step 3 – Scheduled Report Options

The next step will require you to select the Scheduled Report Options.



<u>Filtered Report:</u>

Select from a list of existing Filtered Reports

<u>Report Format:</u>

Choose from either PDF or Excel as the submitted report

<u>Report Locale:</u>

Select a language for the report

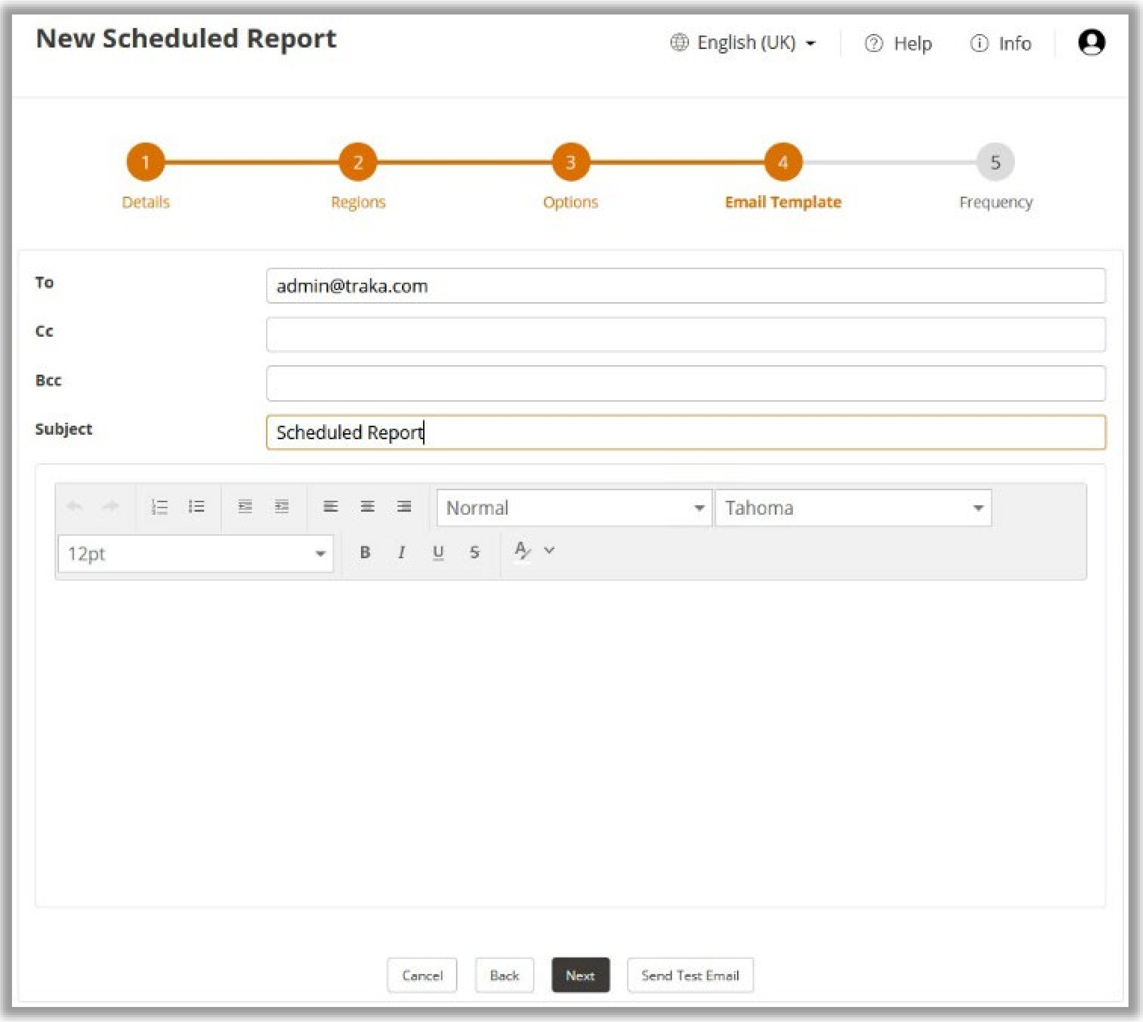
<u>Send Empty Reports:</u>

Enabling this check box will allow reports containing no information to be sent

6. Once you have made the required selections, click on **Next** to continue.

Step 4 – Email Template

At the next page, you will be required to fill out the details for the email template. This will include the recipients email address, the subject name and the main body text as required. If needed, a test email may be sent by clicking on the **Send Test Email button**.

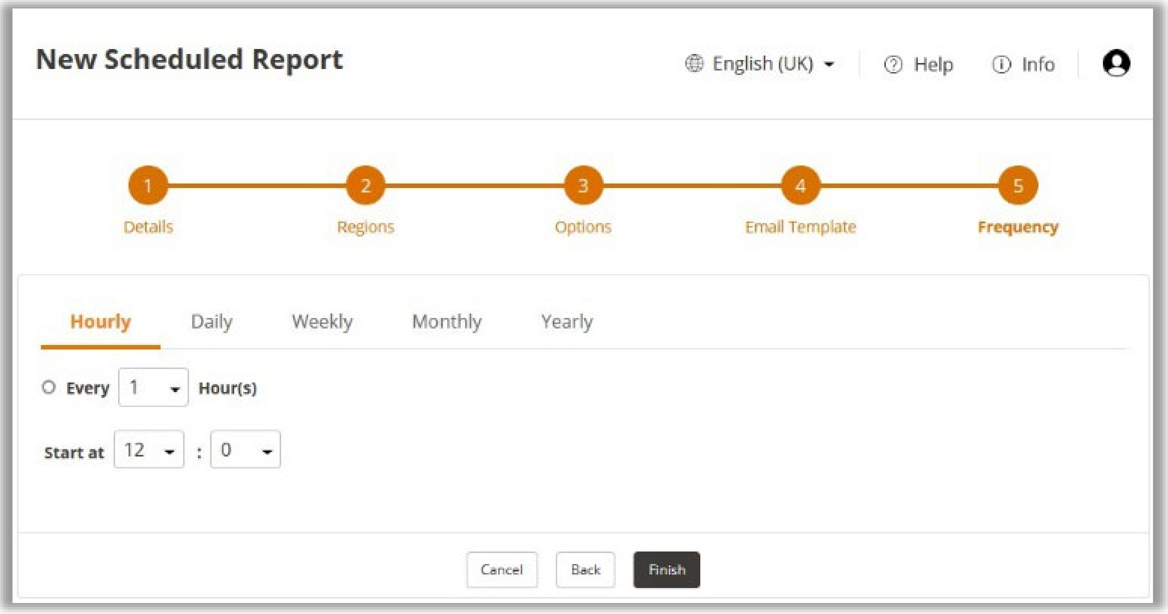


7. Once you have completed the email template, click on **Next** to continue.

Step 5 - Frequency

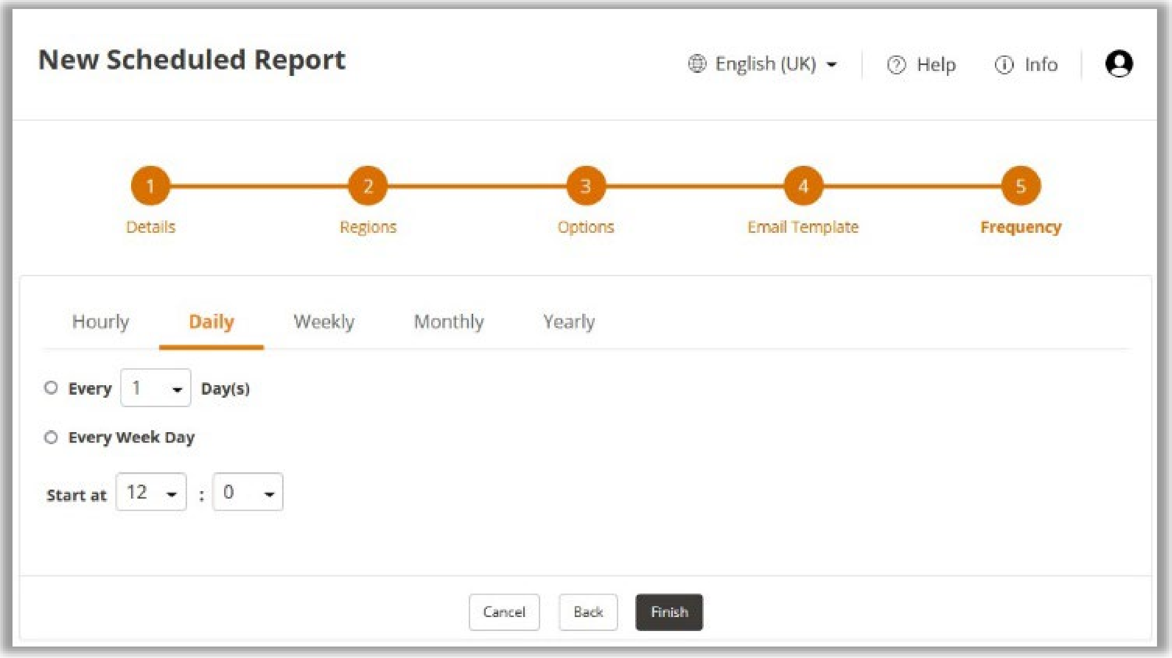
At the next page, you will be required to select the frequency for when the Scheduled Report will be sent. Below is an overview of the options for each tab.

Hourly



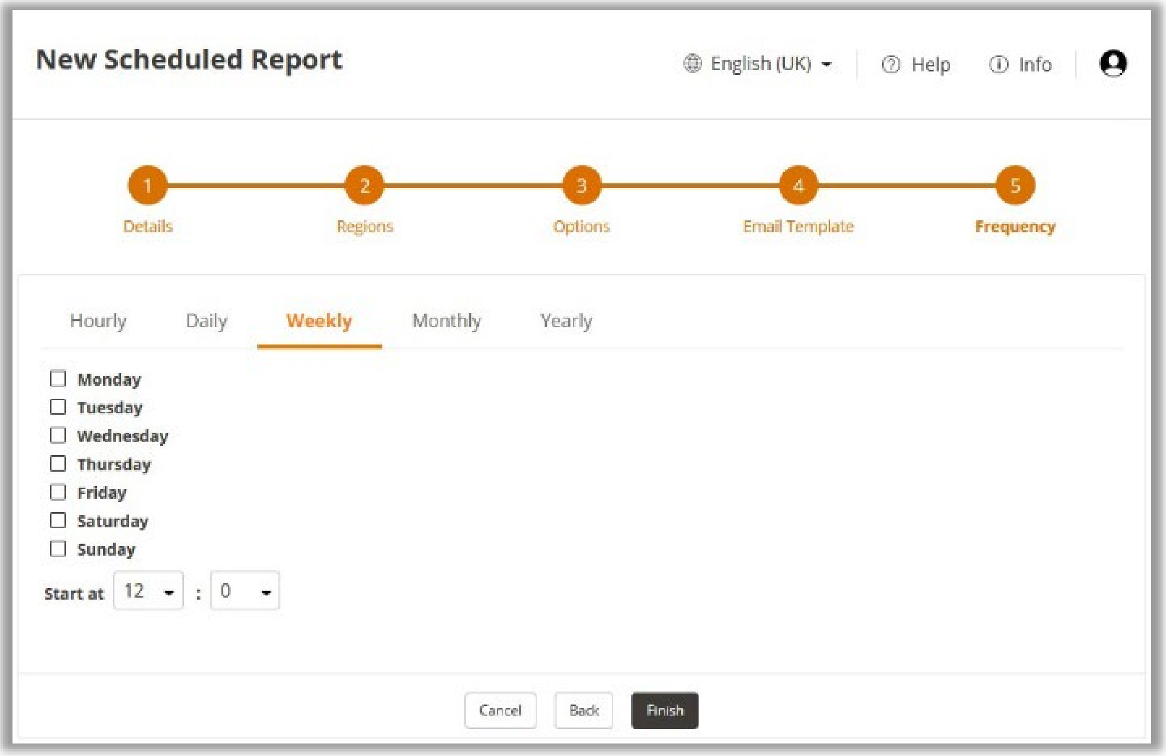
- Select the **Every** option to determine the hourly frequency between 1 and 24 hours
- Set the start time.

Daily



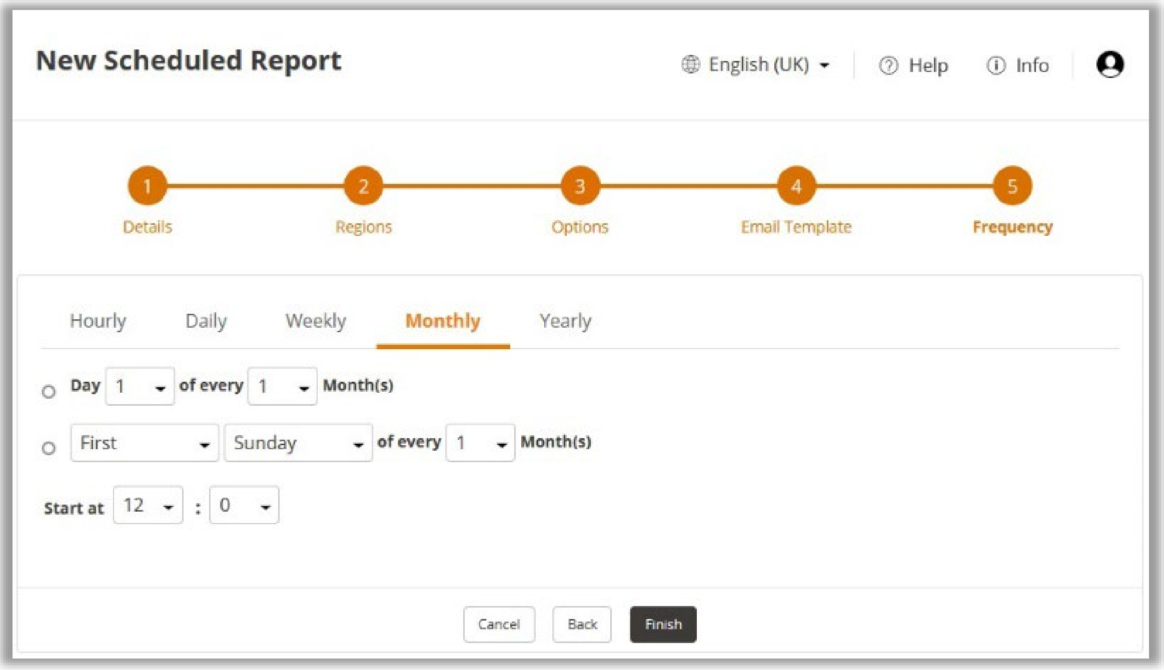
- Select the **Every** option for the frequency of days between 1 and 31 *or* select **Every Week Day**
- Select a start time

Weekly



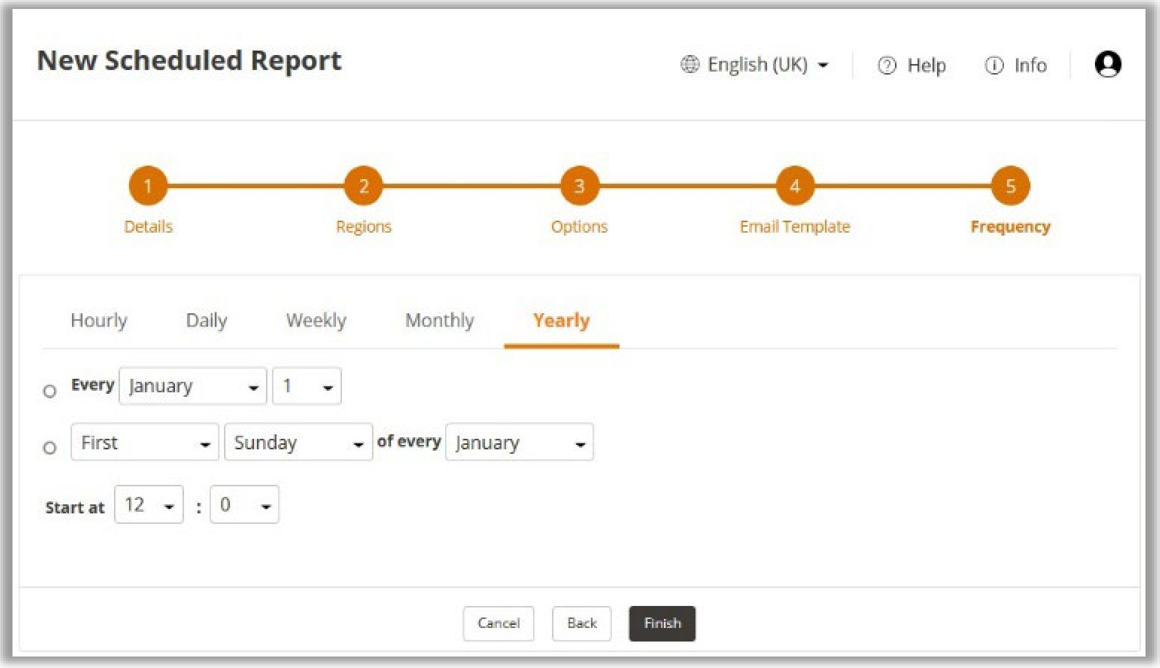
- Select which days of the week the Scheduled Report will be sent
- Select a start time

Monthly



- Select Day 1-31 of every 1-12 month(s) *or* select First-Fourth, Sunday-Saturday of every 1-12 Month(s)
- Select a start time

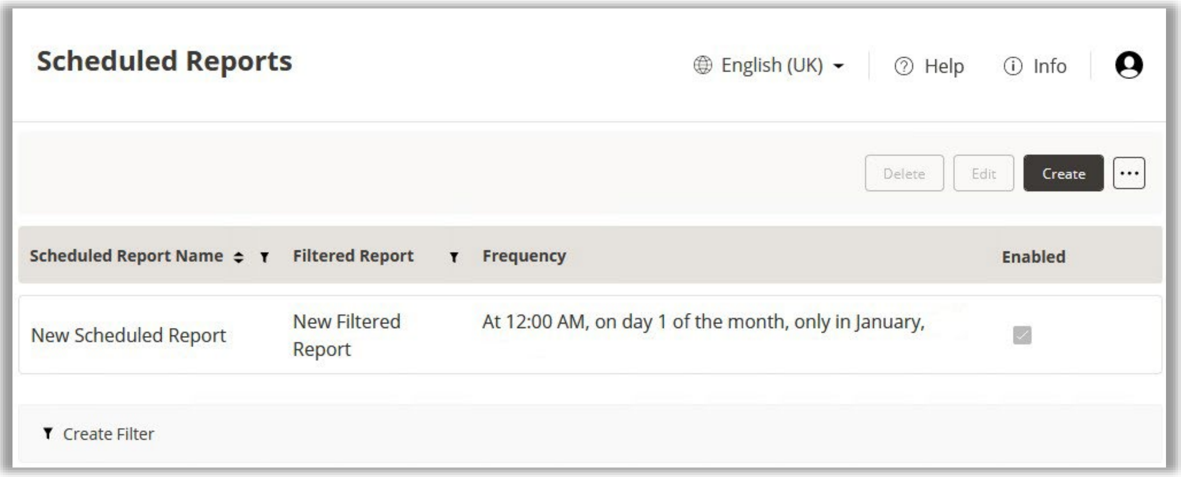
Yearly



- Select Every January-December 1-31 *or* select First-Fourth Sunday-Saturday of every January-December
- Select a start time

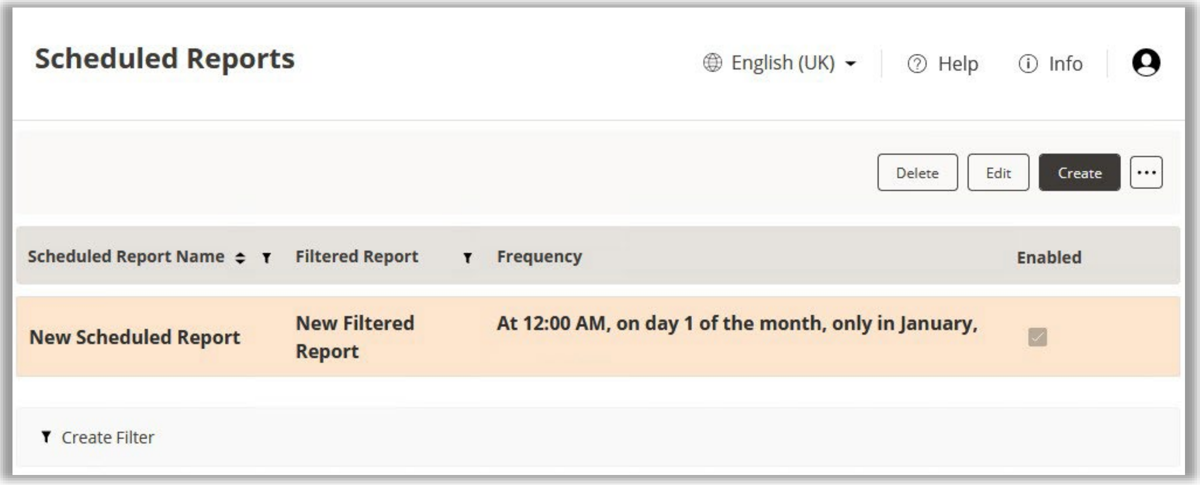
8. Once you have completed setting the Scheduled Report Frequency, click on the **Finish** button.

The next page will provide a summary of the Scheduled Report as shown in the example below.



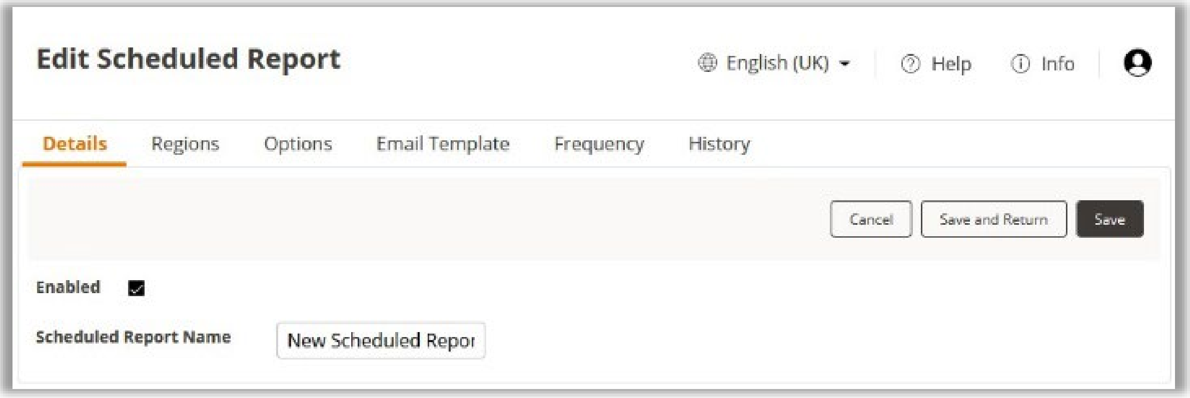
6.14.7 EDITING A SCHEDULED REPORT

1. Select the Scheduled Report that you wish to edit.



2. Either double-click on the chosen report or click the **Edit** button on the Toolbar.

This will enable you to navigate through the previous steps and edit any required information.

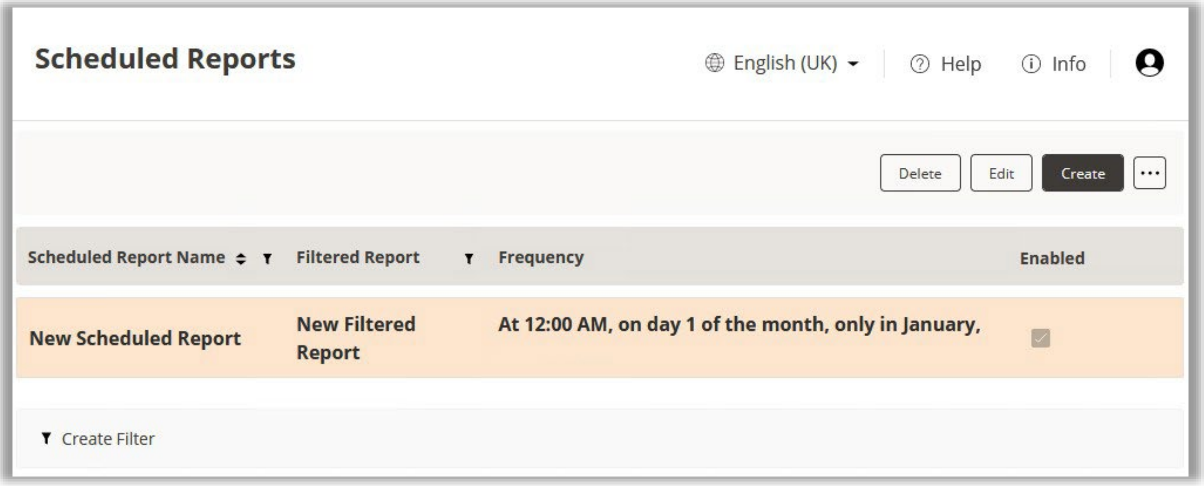


NOTE: A History tab is also available to show an audit of any changes.

6.14.8 DELETING A SCHEDULED REPORT

NOTE: There are no restrictions for deleting a Scheduled Report.

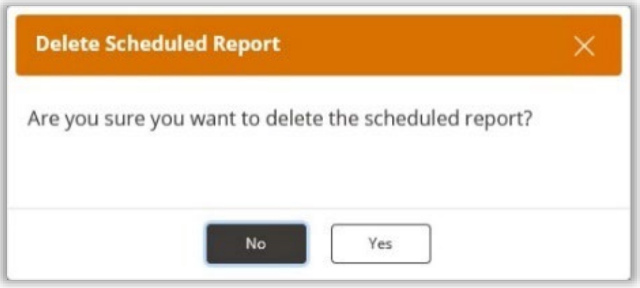
1. Select the Scheduled Report that you wish to delete.



2. Next, click on the **Delete** button on the Toolbar.

A message will then appear requesting confirmation that you wish to delete the Filtered Report.

3. Click on **Yes** to confirm.

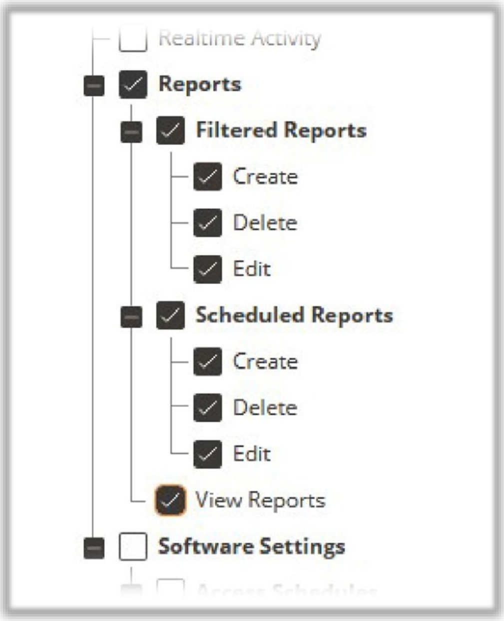


The Scheduled Report will then be removed.

6.14.9 SOFTWARE PERMISSIONS

Both Filtered Reports and Scheduled Reports have individual Software Permissions. These can be applied in the Software Permissions Groups. The permissions can be applied to adding, editing, or deleting either Filtered Reports or Scheduled Reports or both.

1. From the Software Permissions Groups, select the permissions for a selected User to have access to as shown.



6.15 TRAKAWEB FIFO & ADVANCED FIFO

6.15.1 INTRODUCTION

The First In/First Out (FIFO) feature was created to further assist organisations in managing their assets more effectively. FIFO was designed to even out asset usage, allowing devices with charging the maximum opportunity to recharge, therefore minimising downtime as much as possible.

NOTE: FIFO and AFIFO cannot be used on the same system. However, they can be used within the same instance of TrakaWEB.

NOTE: FIFO and AFIFO do not monitor charging of assets or battery levels, only which asset has been in the system the longest, therefore having the most charge available.

6.15.2 STANDARD FIFO ON TRAKAWEB OVERVIEW

FIFO is a feature that allows the ability to automatically release the item that has been in the system the longest, based on the idea that this would have the most charge available as it had been in the locker charging for the longest time and to ensure that items are wear-levelled.

For more in-depth information on Standard FIFO on TrakaWEB, please refer to **UD0232 – TrakaWEB FIFO and Advanced FIFO User Guide.**

6.15.3 ADVANCED FIFO FOR LOCKERS ON TRAKAWEB OVERVIEW

Advanced First In/ First Out (AFIFO) builds upon FIFO and allows the management of more than one type of asset in the same locker, in the same logged-in session. For example, a user could take the Smartphone and Tablet that have been in the locker the longest.

NOTE: Advanced FIFO for Lockers requires TrakaWEB, therefore cannot be used on a standalone Traka Touch.

For more in-depth information on Advanced FIFO on TrakaWEB, please refer to **UD0232 – TrakaWEB FIFO and Advanced FIFO User Guide.**

6.15.4 ADVANCED FIFO FOR KEY CABINETS ON TRAKAWEB OVERVIEW

Advanced FIFO is an optional facility within TrakaWEB that allows authorised users to select one or more types of item from a key cabinet system. For each type of item, the system will automatically issue the item that has been in the key cabinet for the longest, therefore spreading the workload over the group of items and, in the case of keys to equipment or vehicles which recharge while at their stations, maximising the time spent on charge.

NOTE: Advanced FIFO for Key Cabinets requires TrakaWEB, therefore cannot be used on a standalone Traka Touch.

For more in-depth information on Advanced FIFO on TrakaWEB, please refer to **UD0232 – TrakaWEB FIFO and Advanced FIFO User Guide.**

6.16 ALLOWANCE ACROSS SYSTEMS (AAS)

6.16.1 INTRODUCTION

Allowance Across Systems (AAS) is a cost option feature which will enable users to take specific items of the same type assigned to a Common Item Access Group (CIAG) from across multiple Advanced FIFO and Fixed Return systems. The Allowance Across Systems functionality will be dependent on the Real Time Update Service (RTUS) which will provide an up to date and accurate access rights calculation which will be performed across all systems.

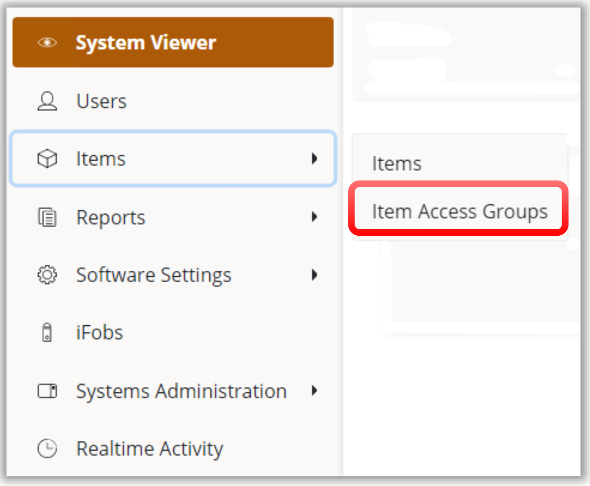
A configuration will be required to enable the Allowance Across Systems feature which can be obtained from Traka.

For more information on the setup and configuration of RTUS, refer to **TD0165 – TrakaWEB Real Time Update Service Setup & Configuration Guide.** For more information on the setup and configuration of Advanced First in/First out, please refer to **UD0232 – TrakaWEB FIFO and Advanced FIFO User Guide.**

6.16.2 SETTING UP ALLOWANCE ACROSS SYSTEMS – (ADVANCED FIFO)

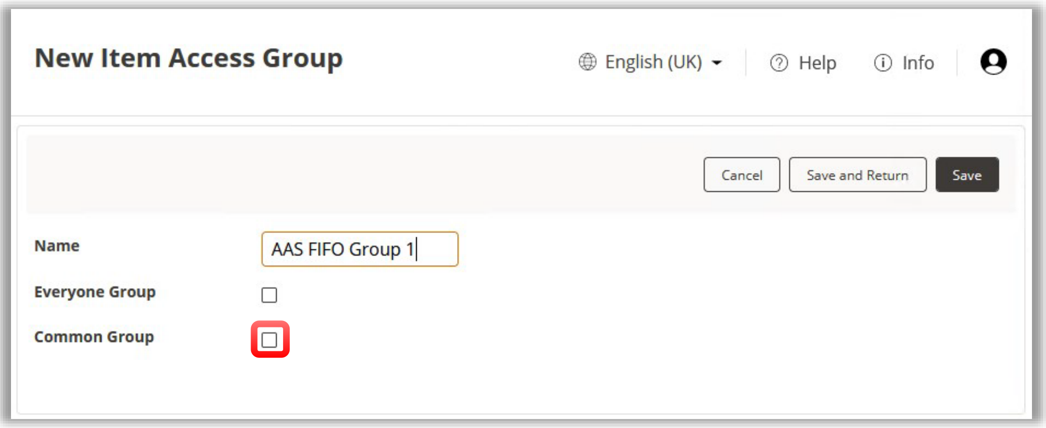
A Common Item Access Group will need to be created to enable the functionality of AAS which will enable items of the same type to be grouped together in a single group.

1. Select the **Item Access Groups** tab from the Navigation Menu.

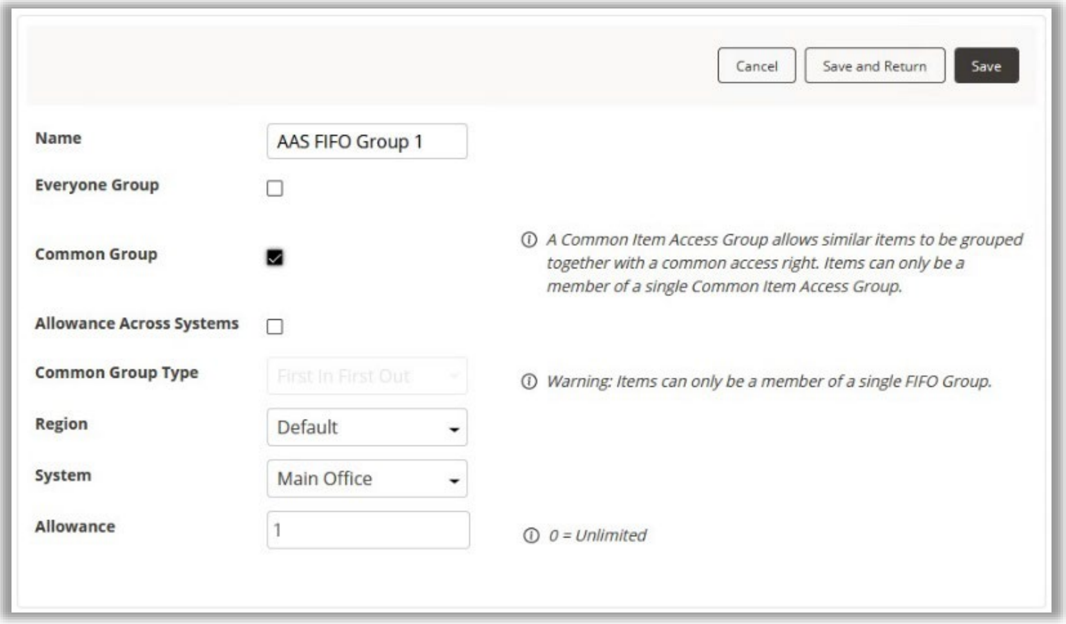


2. At the Item Access Groups page, select the **Create** button on the Toolbar.

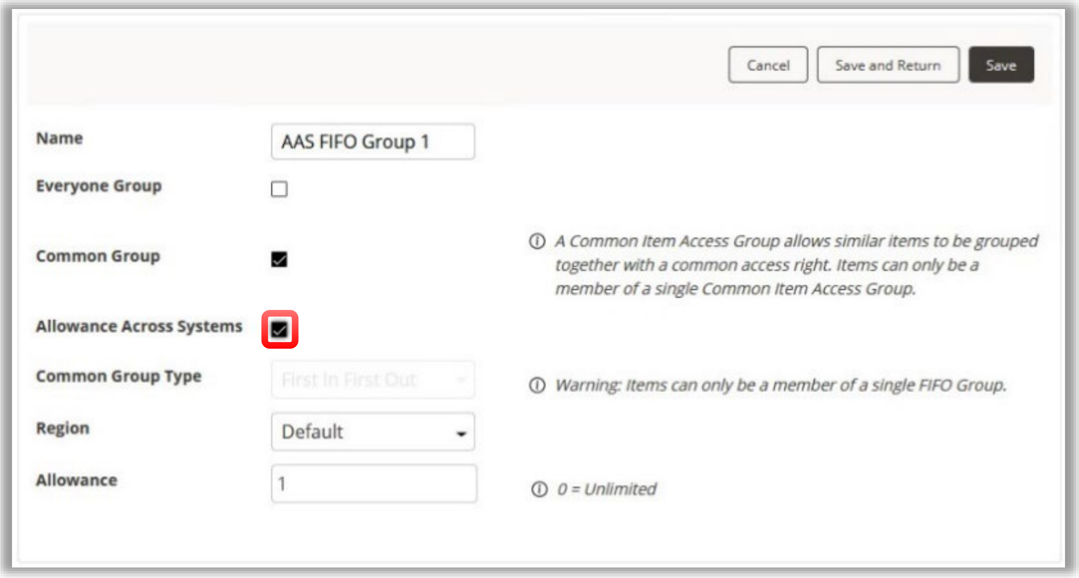
3. Next, enter a name for the group and then place a tick in the Common Group check box.



Selecting this check box will enable you to access the AAS functionality as shown below.



4. Place a tick in the check box for **Allowance Across Systems.**



You will notice that the **System** dropdown menu is no longer visible. This is due to the option only being applicable to one system and, by definition, Allowance Across Systems is applicable across multiple systems.

NOTE: If all the systems are set as First In First Out, the dropdown menu for Common Group Type will be unavailable.

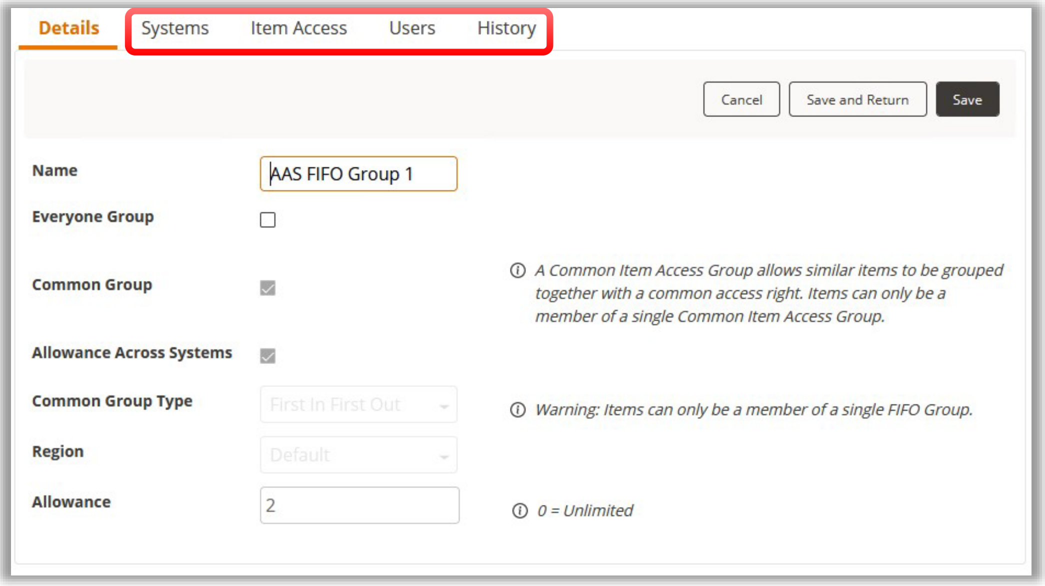
5. Select a specific region from the **Region** dropdown menu that you wish to assign the group to.

6. Assign an allowance value in the **Allowance** box. The default value is set to 1. If the value is set to 0, then that would allow the user to take as many items from the group as they would like. In this example, the item allowance has been set to 2.

7. Once complete, click on **Save.**

NOTE: Once saved, you will only be able to edit the Name, Everyone Group and Allowance options.

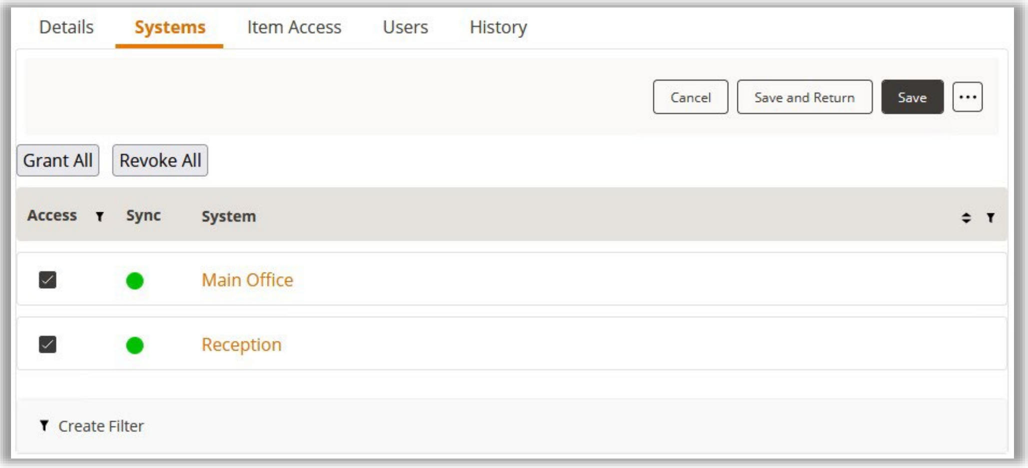
You will notice that after saving, four new tabs will be made available.



8. Click on the **Systems** tab.

The **Systems** tab will list of all the available systems within the selected region.

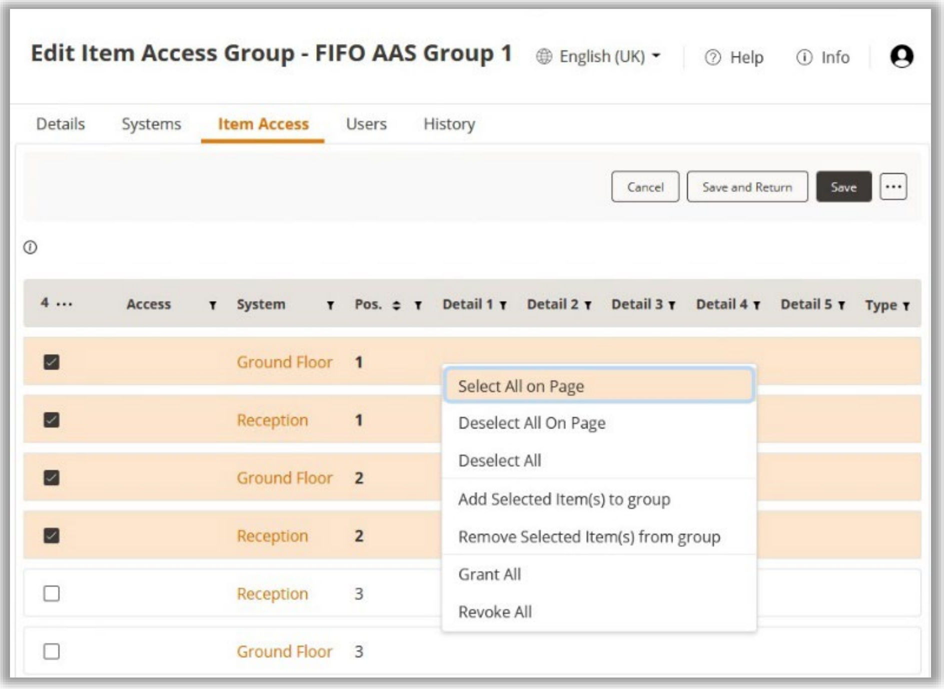
9. Select the systems that you wish to add to the group. You can choose to select and deselect them individually or use the **Grant All** and **Revoke All** buttons.



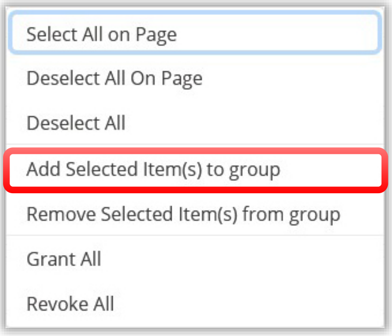
10. Next, select the **Item Access** tab.

The **Item Access** tab will list all the items from the previously selected systems. You may choose to select items individually or by using the Multi-Select/Multi-Edit function, you can select all the items at once.

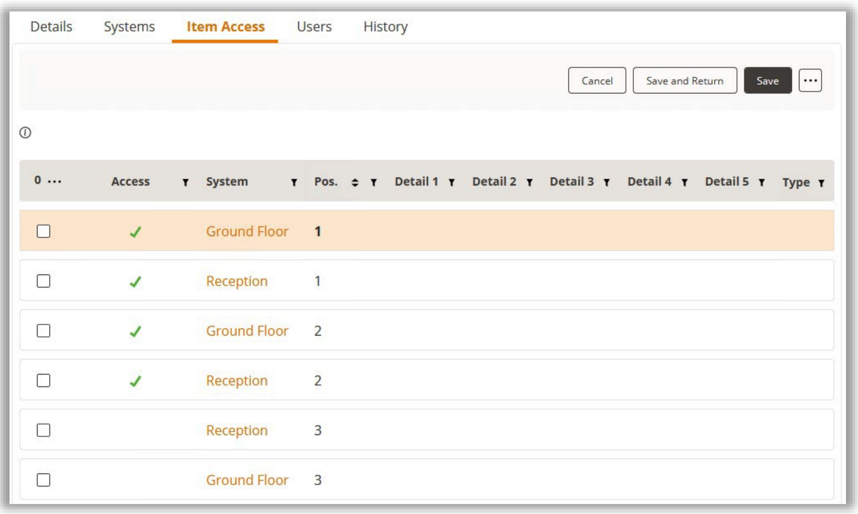
In the example below, 2 items from each system have been selected.



11. Next, right click within the grid and choose the **Add Selected Item(s) to Group.**



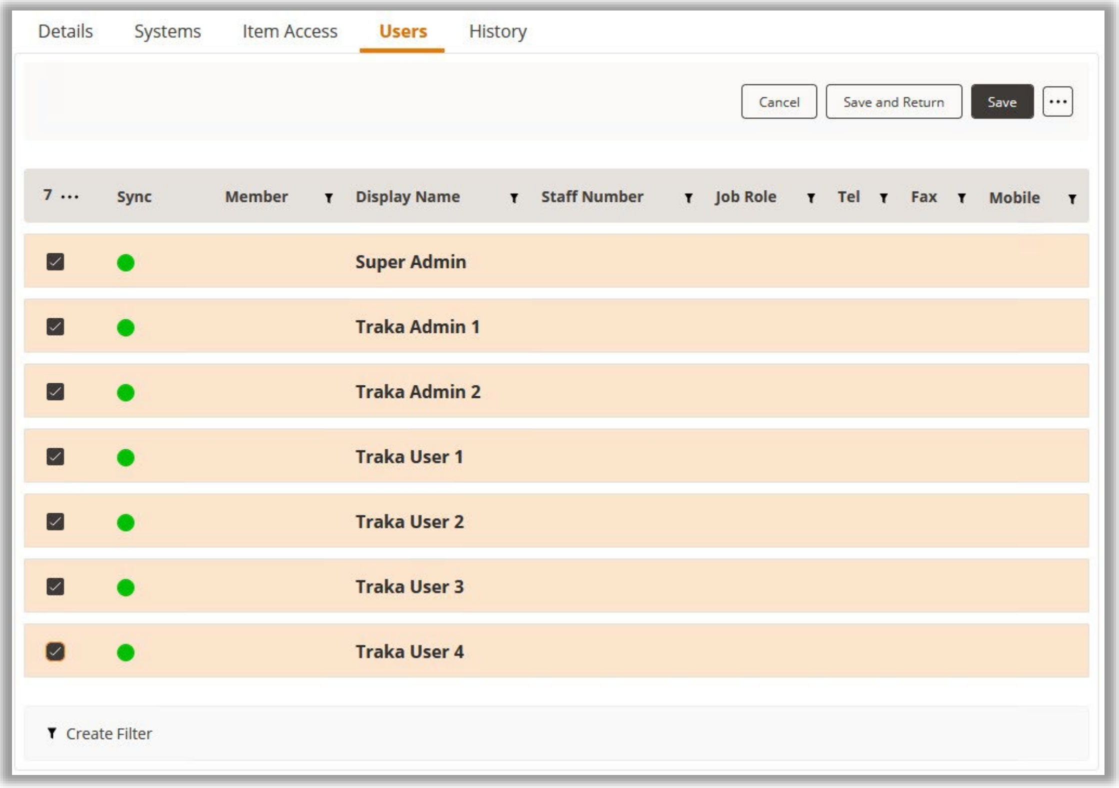
After confirmation, you will now see a green tick against the selected items indicating that they have now been added to the group.



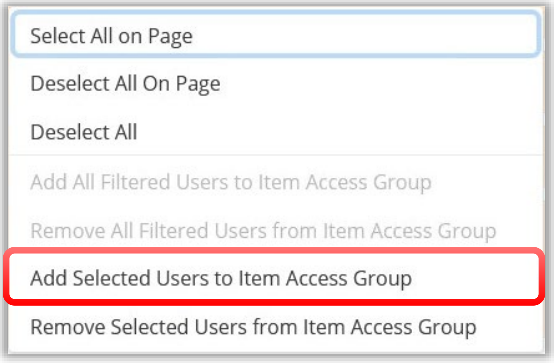
12. Now select the **Users** tab.

The **Users** tab will display a list of all the available users who have been granted access to the selected systems.

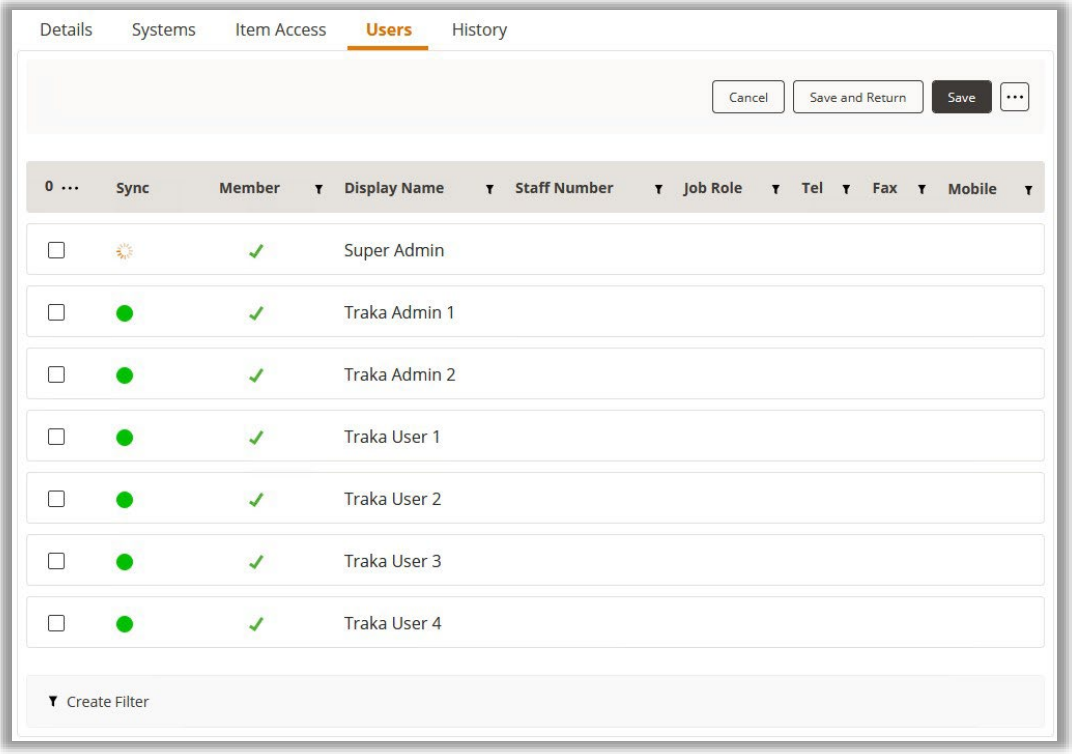
13. Select which users you wish to assign to the group.



14. Right-click within the grid and select Add Selected Users to Item Access Group.



After confirmation, you will now see a green tick against the selected users indicating that they have now been added to the group.

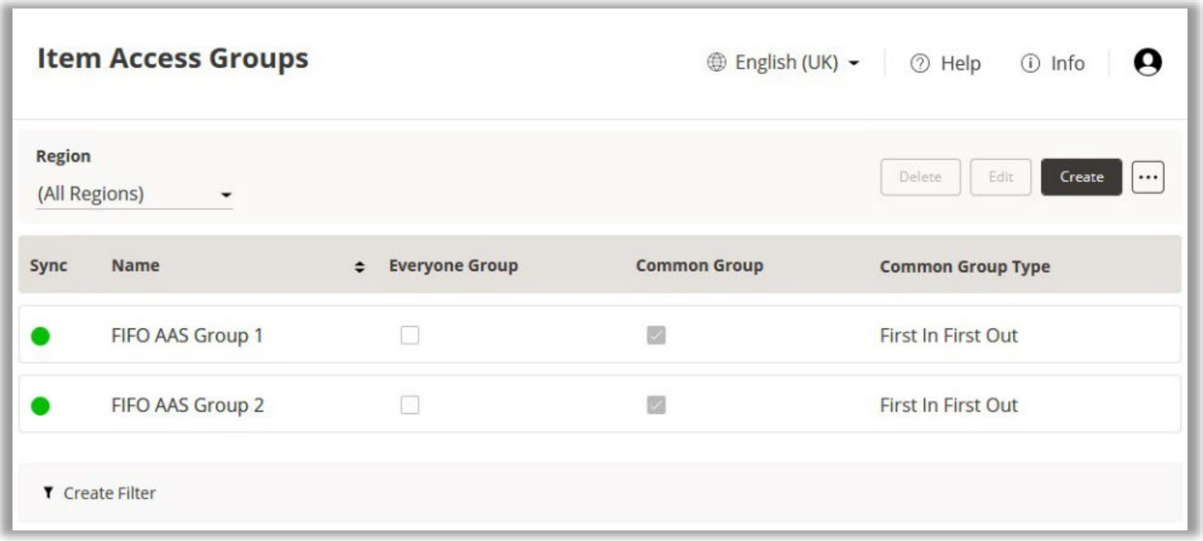


15. Once completed, click on the **Save and Return** button.

You may now return to the Item Access Groups page to create additional Common Item Access Groups as required.

Should you wish to make any changes to the Common Item Access Group, return to the **Item Access Groups** page and select the group you wish to edit and then click on the edit button. You will then be taken back though steps as shown above.

NOTE: If you have more items to which you wish to allow access to across multiple systems, they must each be assigned to a different Common Item Access Group as items can only be a member of a single group.



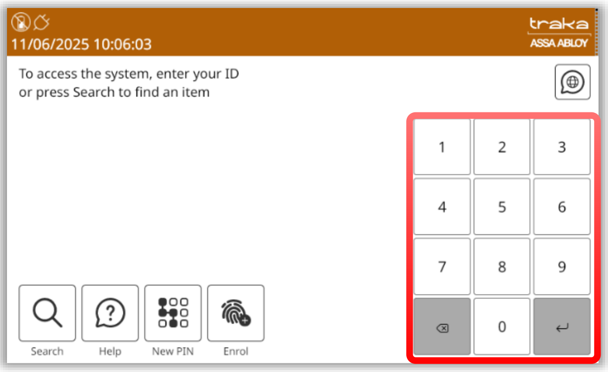
6.16.3 USING ALLOWANCE ACROSS SYSTEMS - (ADVANCED FIFO)

The following section describes the process of using Allowance Across Systems. In this example, 2 systems have been configured to utilise the feature. 2 Common Item Access groups have been created with 4 items in each and divided across both systems. To demonstrate the functionality, users have been granted an allowance of 2 items from each group.

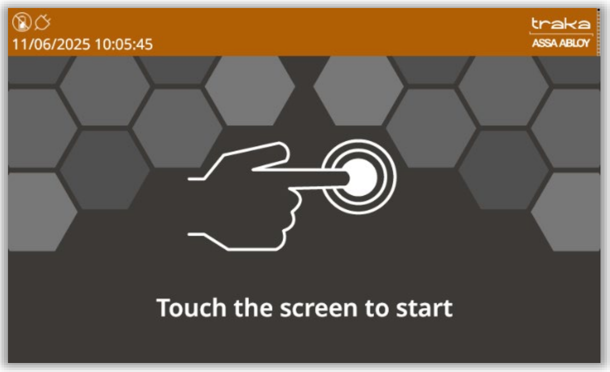
A User is able to take up to the allowance for a group from just one of the systems or across both systems. For example, if group A consists of 2 items on System 1 and 2 items on System 2 then a user with access to the group could take one item from both systems or both items from just one of the systems. Once the allowance of 2 for that group has been met, they cannot remove any more items that belong to that group from either system.

6.16.4 TAKING & RETURNING ITEMS – NON-ADMIN USER - (ADVANCED FIFO)

1. Log into system 1 using either keypad, credential or fingerprint.

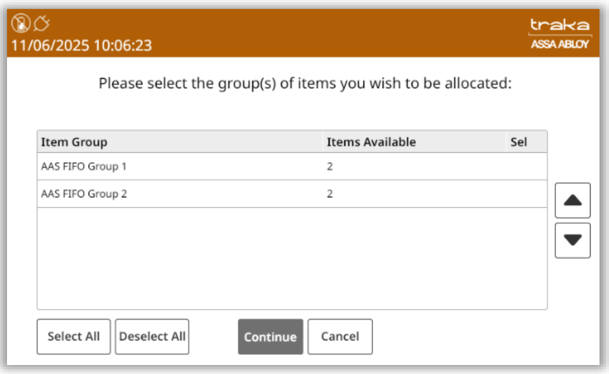


System #1



System #2

Once logged in, a list of groups that the user has been allocated access to will be displayed.

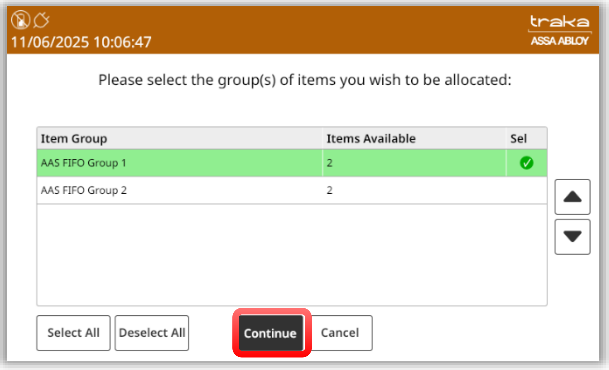


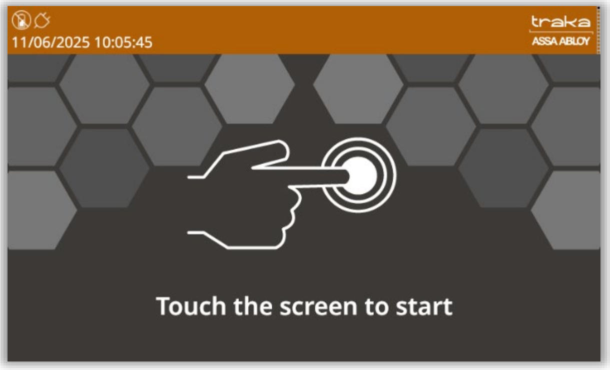
System #1

System #2

You will have the option to select individual groups or select all the available groups by pressing the **Select All** button. This may be cancelled by selecting **Deselect All.** The **Items Available** column will display your item allowance for the groups that you have been granted access to.

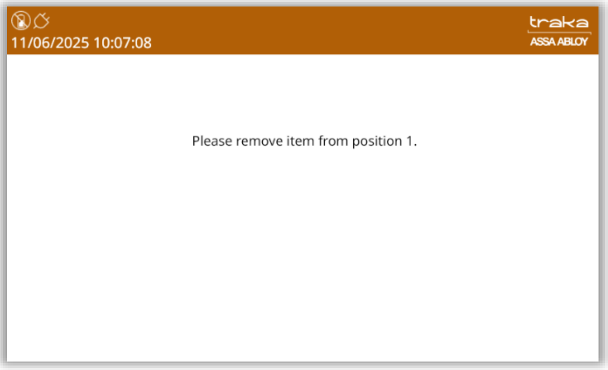
2. Select the required groups and then click on **Continue.**

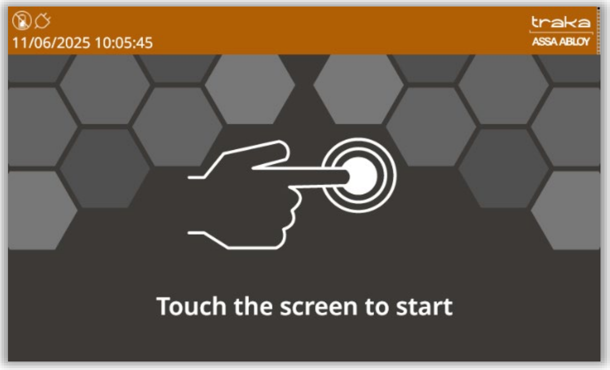




System #1 **System #2**

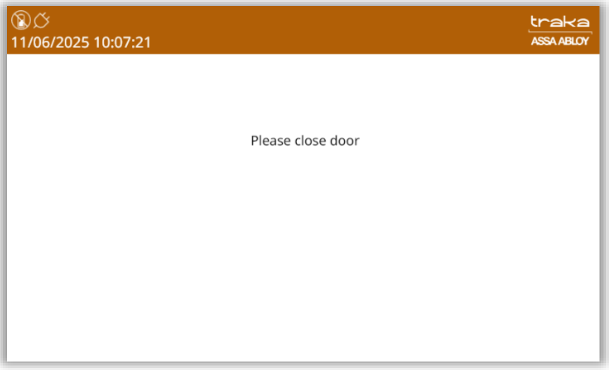
The door will open, and the first available item will be accessible.

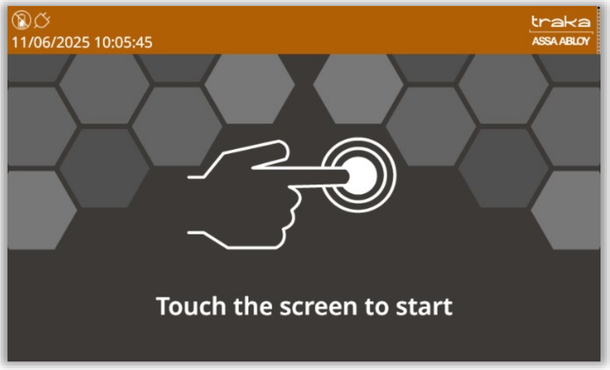




System #1 **System #2**

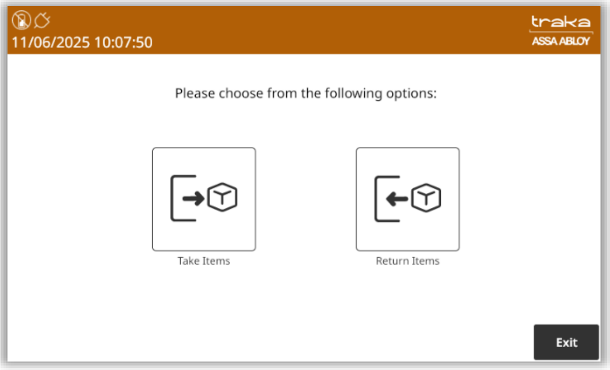
After the Item has been taken, a message will instruct you to close the door.

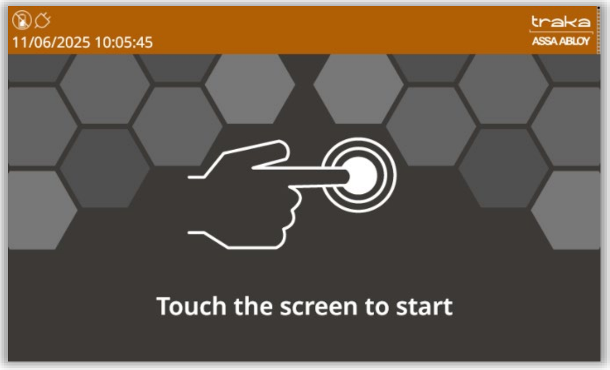




System #1 **System #2**

You may choose to log in again to either take another item or return an item.

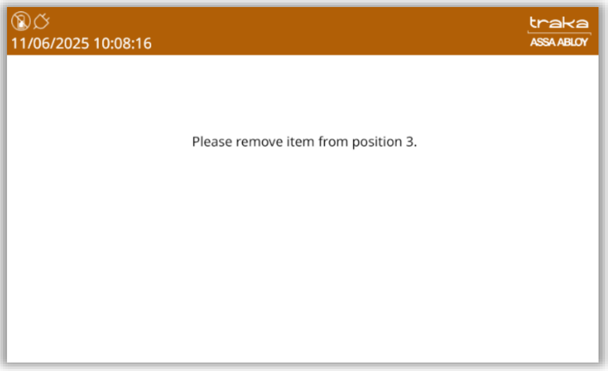


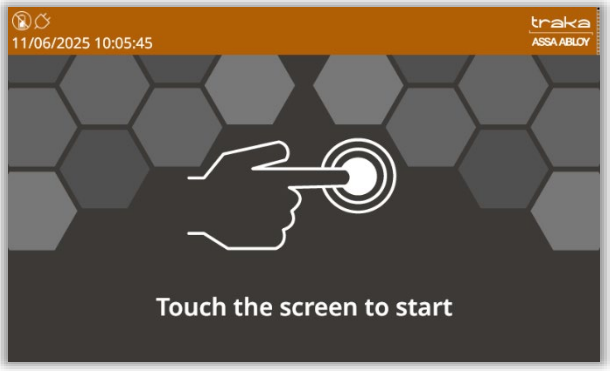


System #1 **System #2**

Once your allowance for that item type has been reached, no more items may be removed from that group.

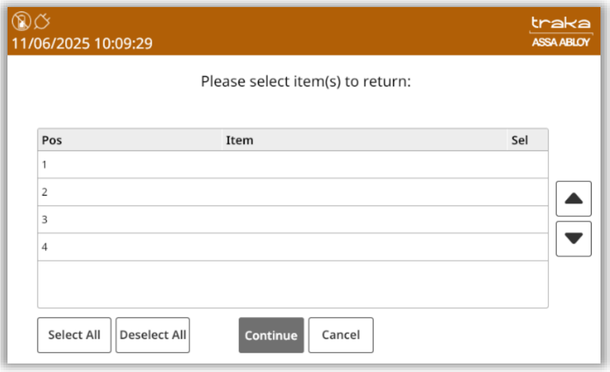
NOTE: You will still have the option to select items from other available groups that you have been granted access to.

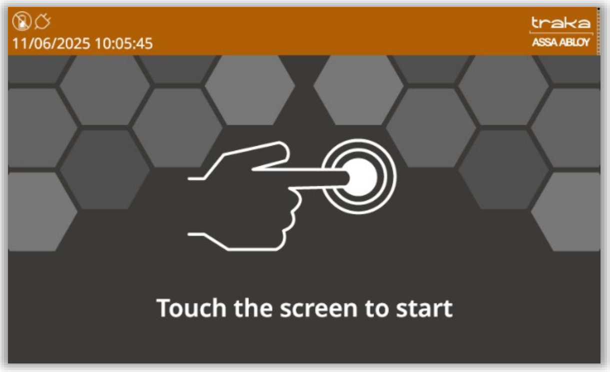




System #1 **System #2**

Once your item allowance across all Item Access Groups has been reached, you will only have the option to return the items in your possession.

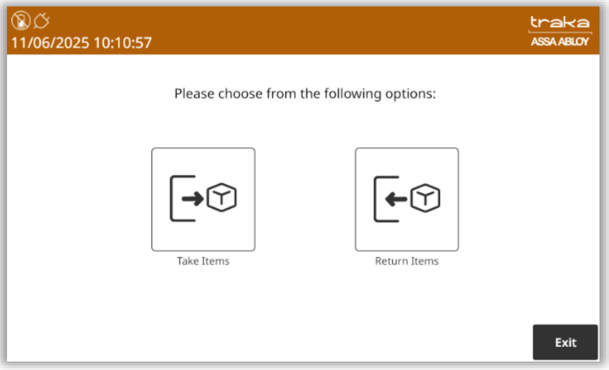




System #1 **System #2**

As the item allowance is applicable across systems, you may log into another system which will grant you with the same permissions.

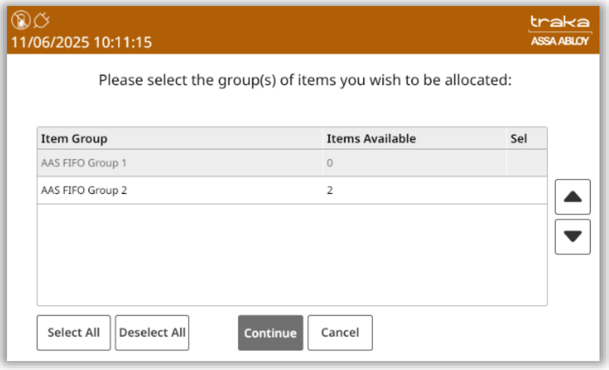
System #1



System #2

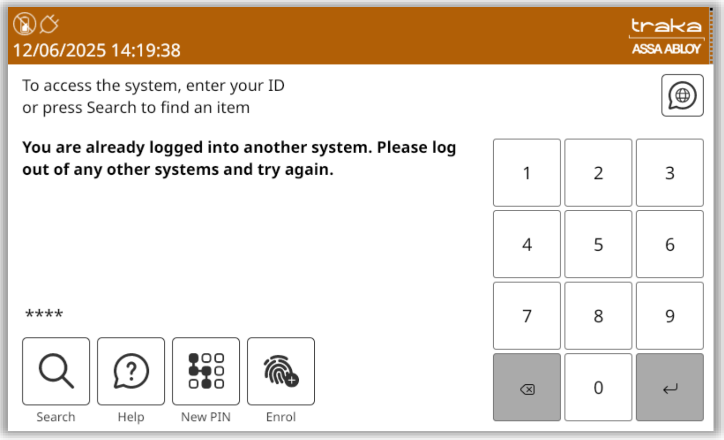
Providing there are still available items, if another user logs into the system, they will be able to take items that they have been granted access to.

System #1

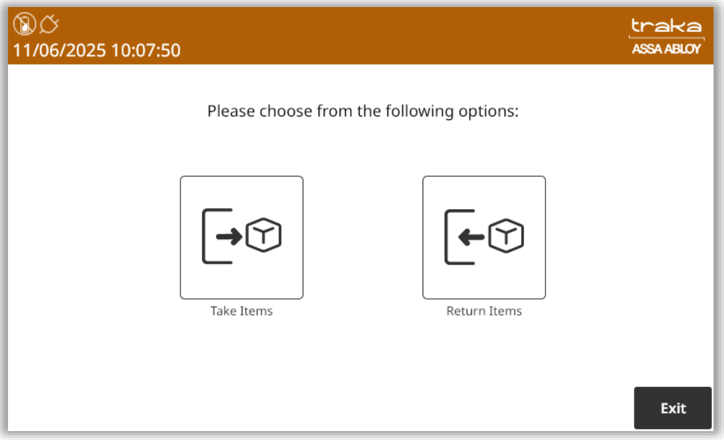


System #2

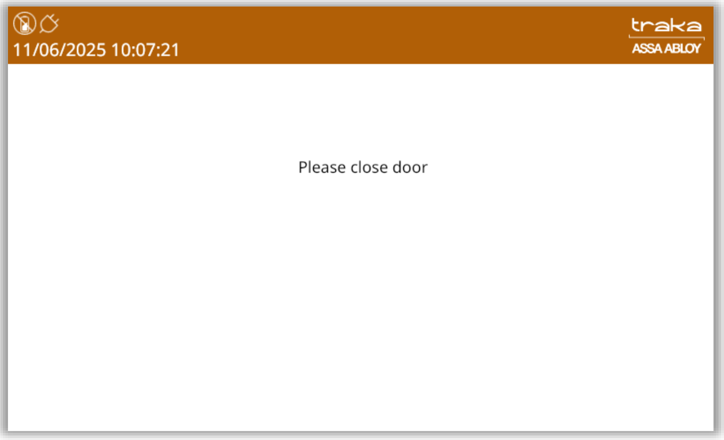
NOTE: A non-admin user cannot log into more than 1 system at a time when Allowance Across Systems has been activated on that system. This does not apply to an admin user.



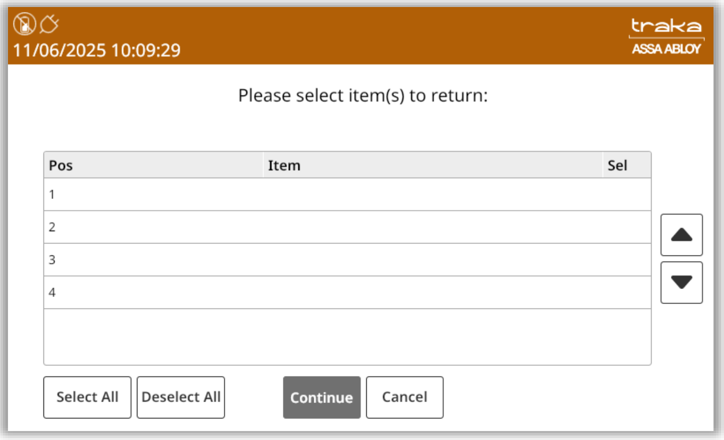
If you already have items in your possession, you may still return to a system to take more items that you have access to. In this instance, when you login, the system will give you the option to either take an item or return an item that you already hold.



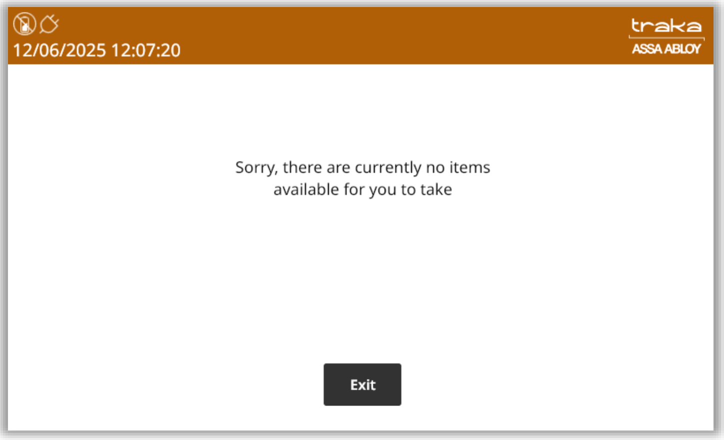
3. Once you have taken or returned an item, you will be asked to close the door.



Once you have reached your item allowance limit, when you next log into the system, you will only have the option to return items.



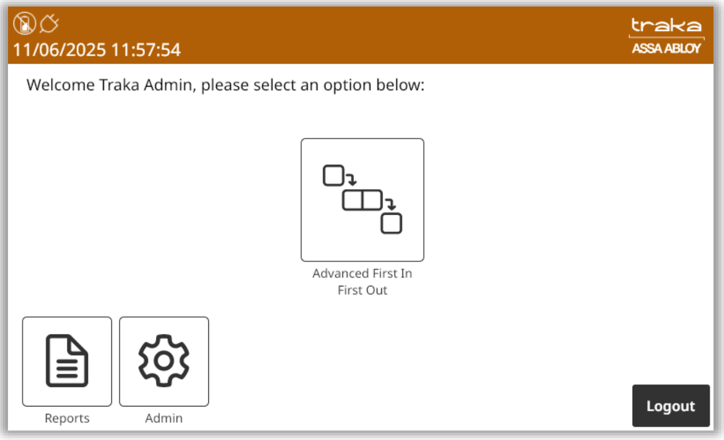
Once all available items from all assigned groups have been taken, you will be presented with the following message informing you that there are no more available items to take.



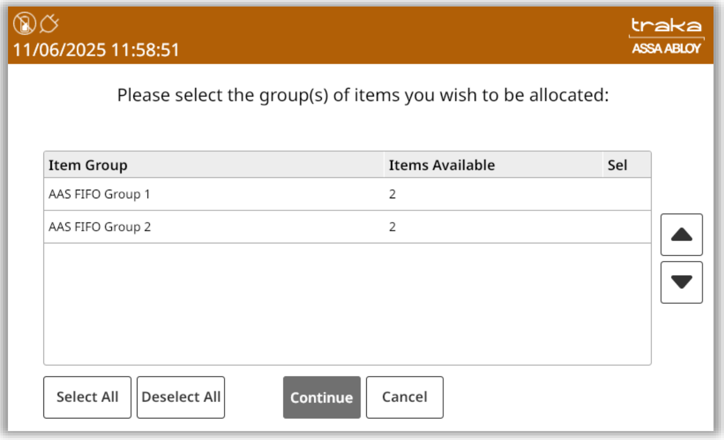
6.16.5 TAKING & RETURNING ITEMS – ADMIN USER - (ADVANCED FIFO)

As an admin user, the same Allowance Across Systems rules will apply as a non-admin user. An admin user will however be able to perform admin activities in Traka Touch.

1. After logging into the system as an admin user, select the **Advanced First In First Out** button as shown here.



You will then immediately be shown a list of the groups that are available to you.



You will now be able to perform the same Allowance Across Systems activities as outlined in the previous section.

6.16.6 OVERRIDE OPTIONS - (ADVANCED FIFO)

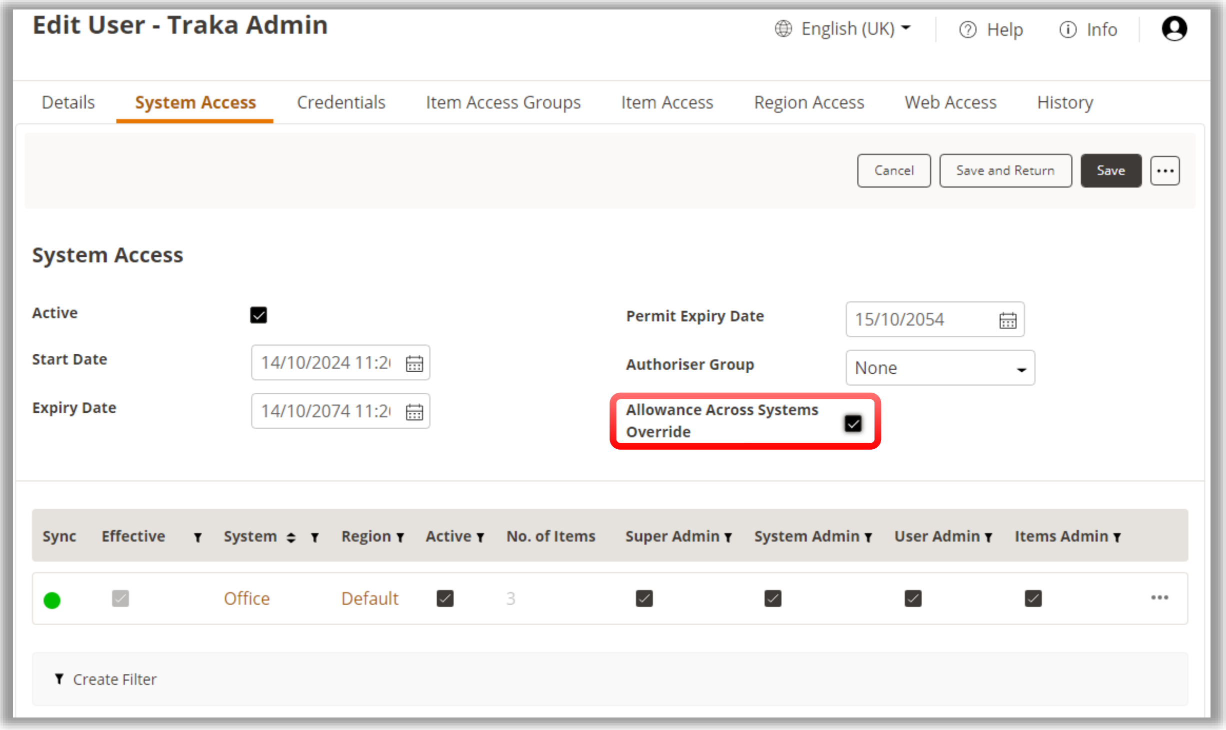
The Allowance Across Systems Override option will allow a user with the permission granted to remove all authorised items from all groups across all systems, overriding the allowance limit. The option to enable the permission is performed in TrakaWEB.

There are 3 separate override options available for Allowance Across Systems in TrakaWEB which can be set individually.

Allowance Across Systems Override:

This option will override the other options and will allow access to all items in their groups on any of the relevant systems.

1. From the Users Page, select a User to whom you wish to grant the override permission and then navigate to the **Edit User** page.
2. Place a tick in the check box for **Allowance Across Systems Override.**



With the override permission enabled. The user will then be able to remove all the available items from across all systems.

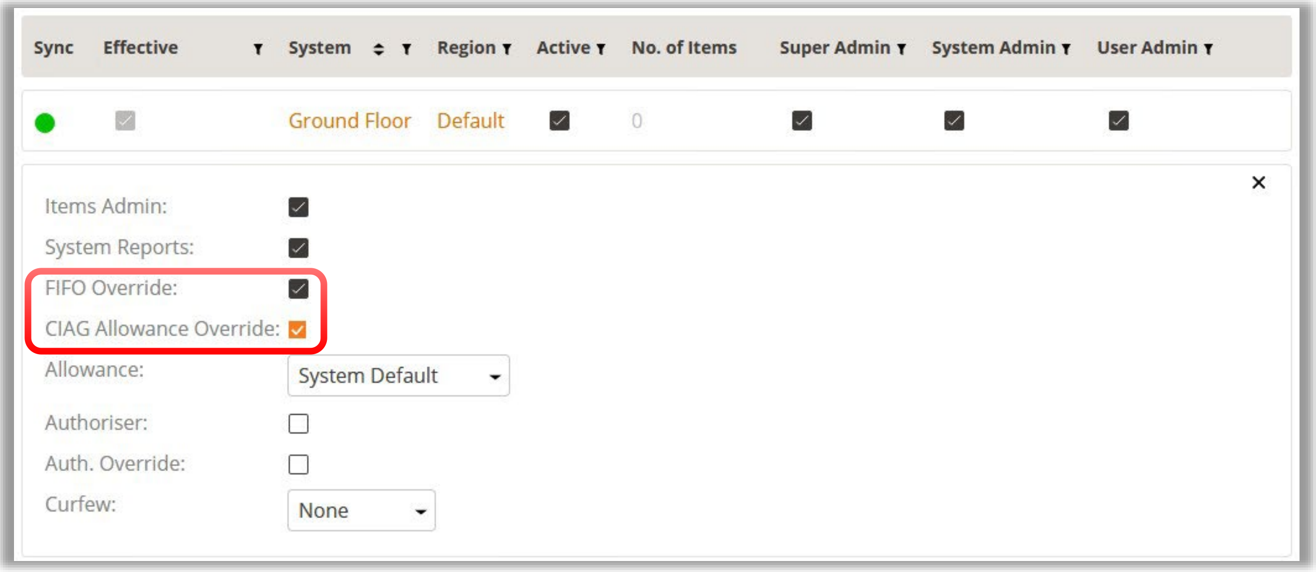
FIFO Override:

This will give a user with one or more CIAG's assigned, access to those groups via **I Know What I Want** or **I Need To Search** as well as the Advanced FIFO button up to the limit of the Common Item Access Group.

CIAG Allowance Override:

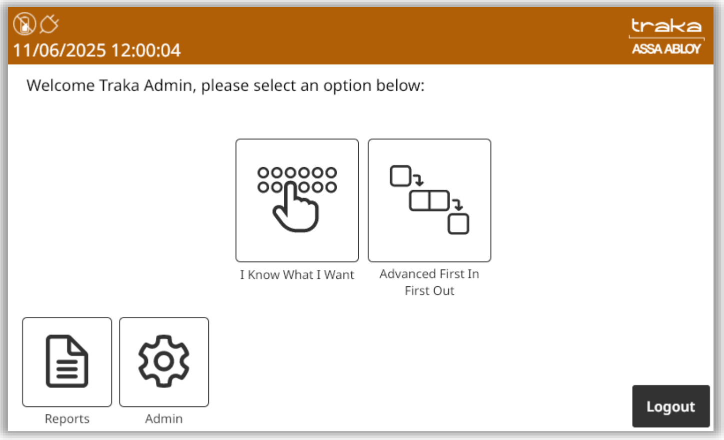
This option removes the allowance limit for non-AAS Common Item Access Groups, so the user can now remove all items from their assigned groups.

From the System Access Grid, you can additionally choose to allocate a user with the **FIFO Override** and/or **CIAG Allowance Override.** With these enabled the user can choose from either the **First In First Out** option or **I Know What I Want.**

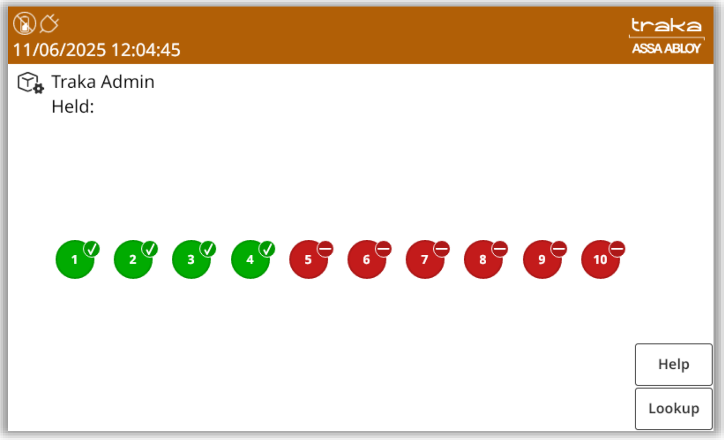


3. With all override options assigned, log into an AAS enabled system.

You may now choose from either the **I know What I Want** option or **Advanced First In First Out** when logging in.



4. Select the **I Know What I Want** button.



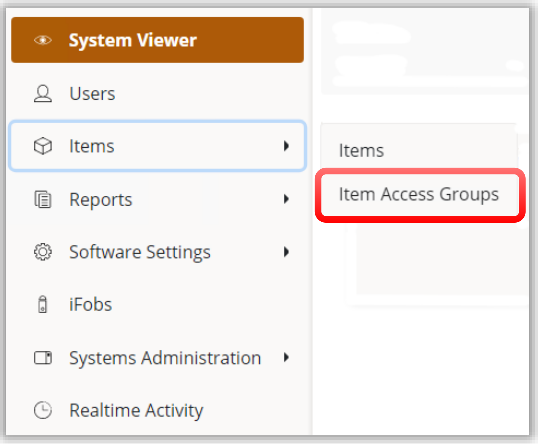
The Common Item Access Groups will no longer appear on the screen. You will now be able to remove any items assigned to you from any AAS enabled system, regardless of the Common Item Access Group they belong to.

Selecting the **Advanced First In First Out** button will still permit you to remove all items from all groups across all systems as described at the start of this section.

6.16.7 SETTING UP ALLOWANCE ACROSS SYSTEMS – (FIXED RETURN)

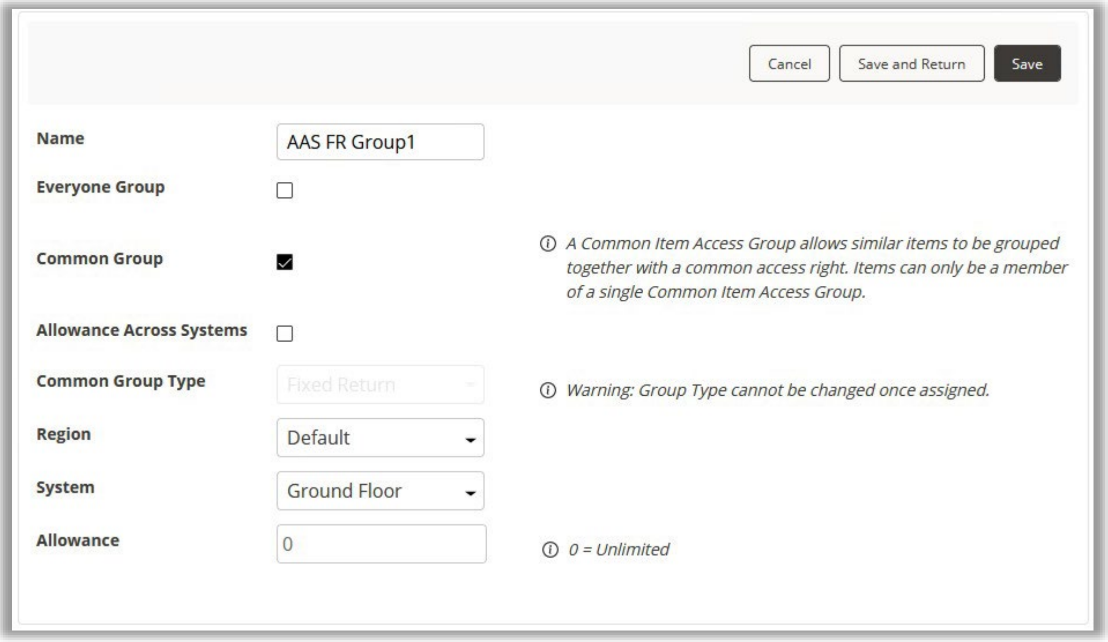
A Common Item Access Group will need to be created to enable the functionality of AAS which will enable items of the same type to be grouped together in a single group.

1. Select the **Item Access Groups** icon from the Navigation Menu.

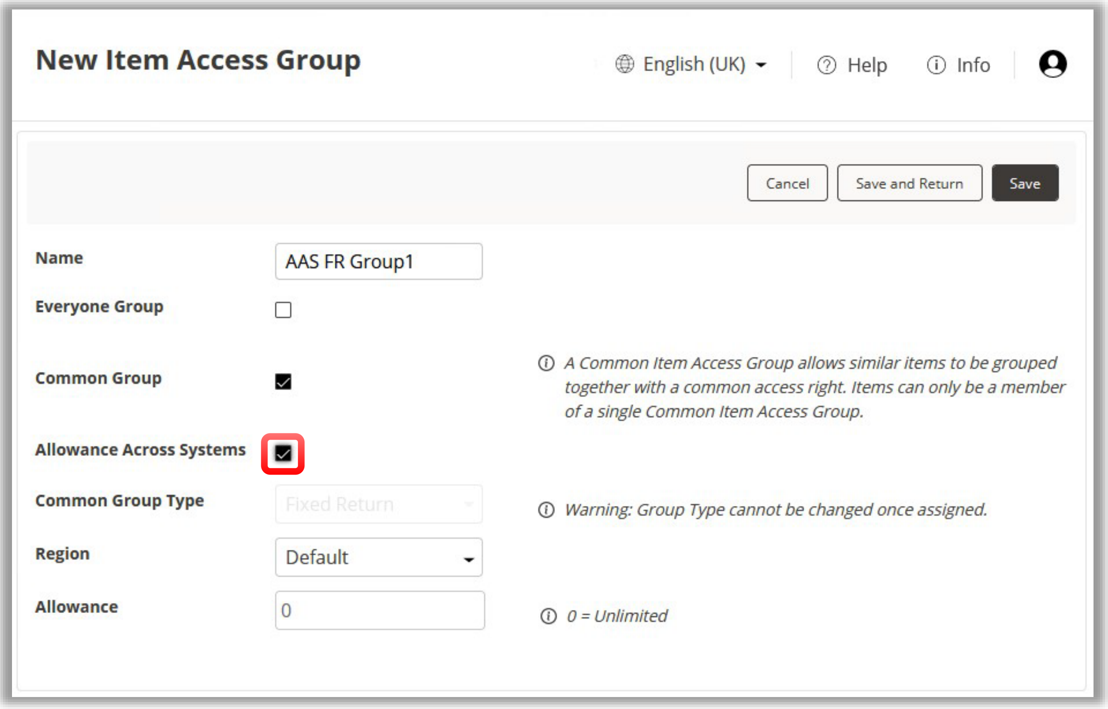


2. At the Item Access Groups page, select the **Create** button.
3. Next, enter a name for the group and then place a tick in the **Common Group** check box.

Selecting this check box will enable you to access the AAS functionality as shown below.



4. Place a tick in the check box for **Allowance Across Systems.**



You will notice that the **System** dropdown menu is no longer visible. This is due to the option only being applicable to one system and by definition, Allowance Across Systems is applicable across multiple systems.

NOTE: If all the systems are set as Fixed Return, the dropdown menu for Common Group Type will be unavailable.

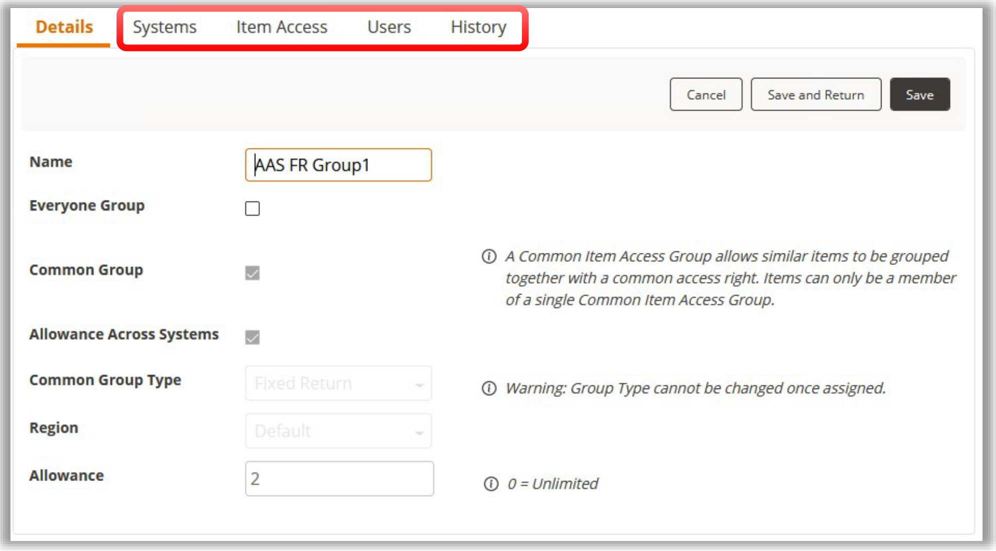
5. Select a specific region from the **Region** dropdown menu that you wish to assign the group to.

6. Assign an allowance value in the **Allowance** box. The default value is set to 0. This value will allow the user to take as many items from the group as they would like. In this example, the item allowance has been set to 2.

7. Once complete, click on **Save.**

NOTE: Once saved, you will only be able to edit the Name, Everyone Group and Allowance options.

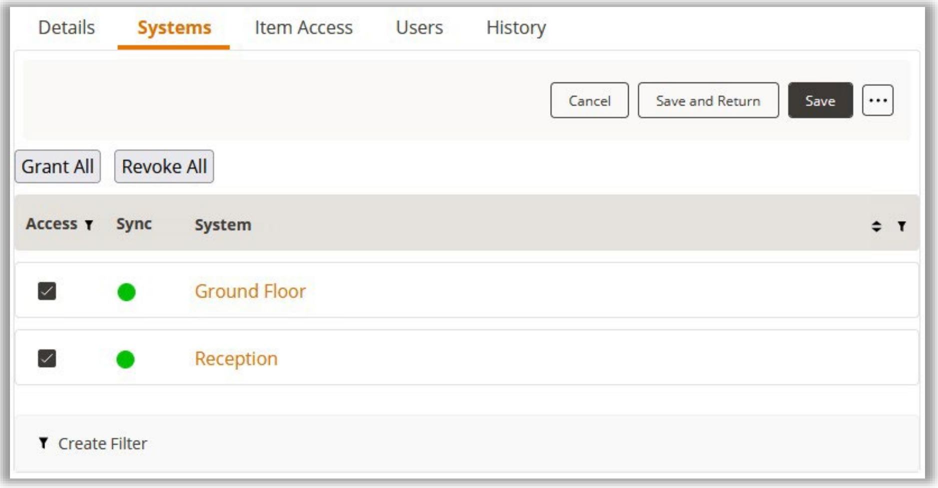
You will notice that after saving, four new tabs will be made available.



8. Click on the **Systems** tab.

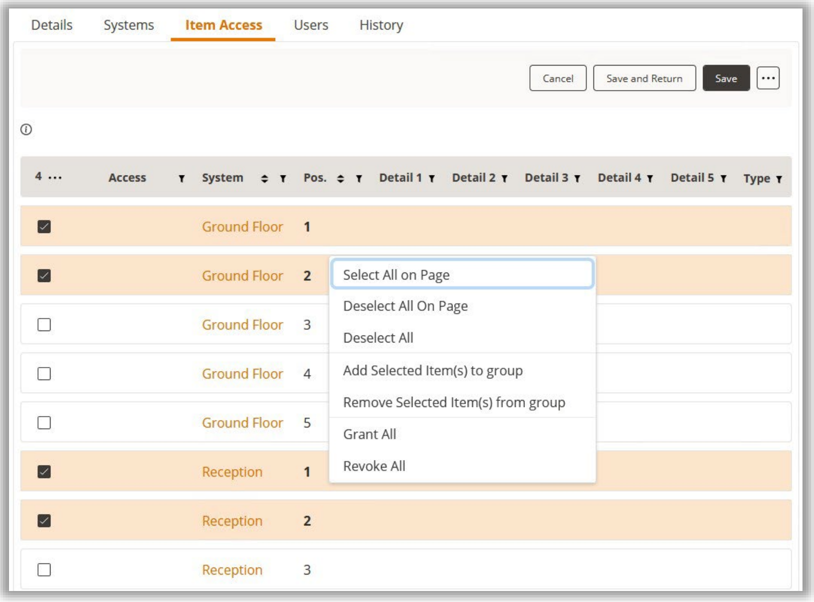
The **Systems** tab will list of all the available systems configured for both Fixed Return and Allowance Across Systems within the selected region.

9. Select the systems that you wish to add to the group. You can choose to select and deselect them individually or use the **Grant All** and **Revoke All** buttons.

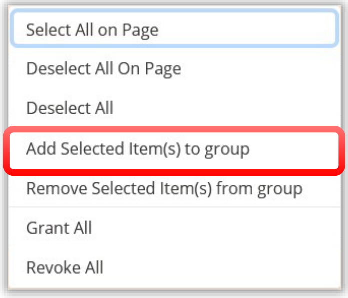


10. Next, select the **Item Access** tab.

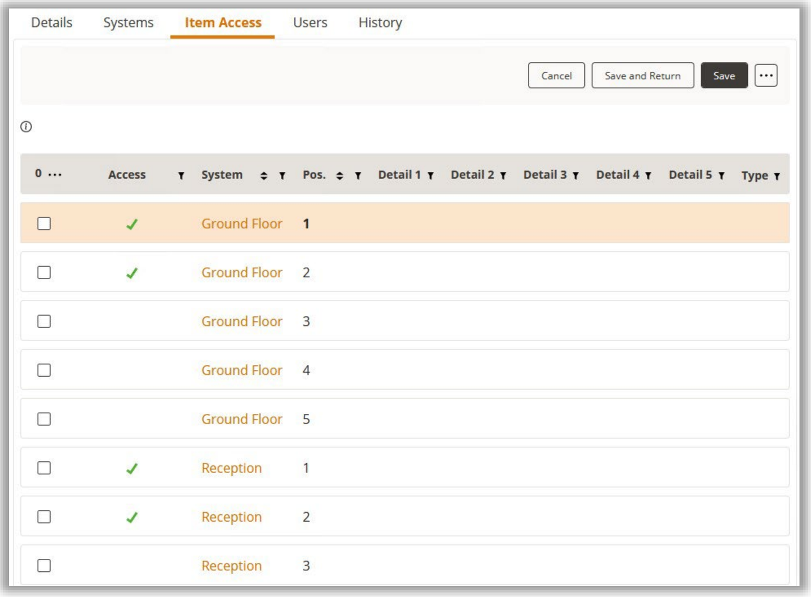
The **Item Access** tab will list all the items from the previously selected systems which are not already part of an Item Access Group. You may choose to select items individually or by using the **Multi-Select/Multi-Edit** function, you can select all the items at once. In this example, 2 items from each system have been selected.



12. Next, right click within the grid and choose the **Add Selected Item(s) to Group.**



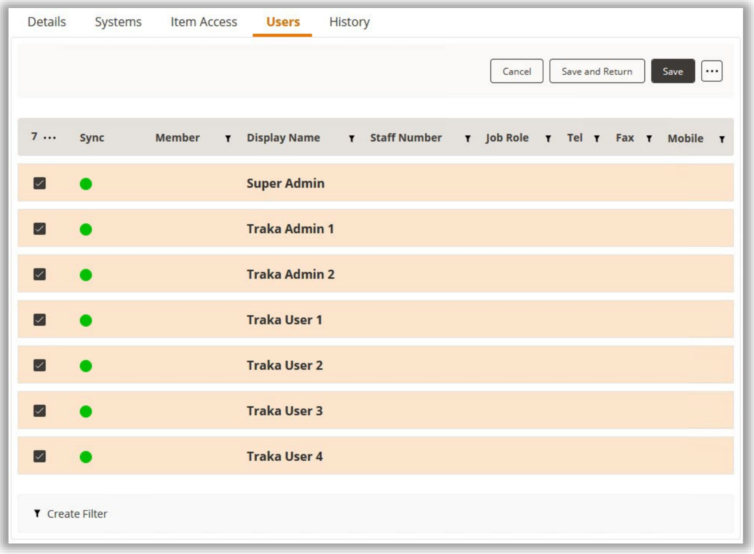
After confirmation, you will now see a green tick against the selected items indicating that they have now been added to the group.



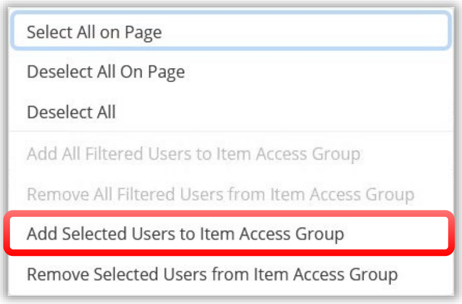
13. Now select the **Users** tab.

The **Users** tab will display a list of all the available users who have been granted access to the selected systems.

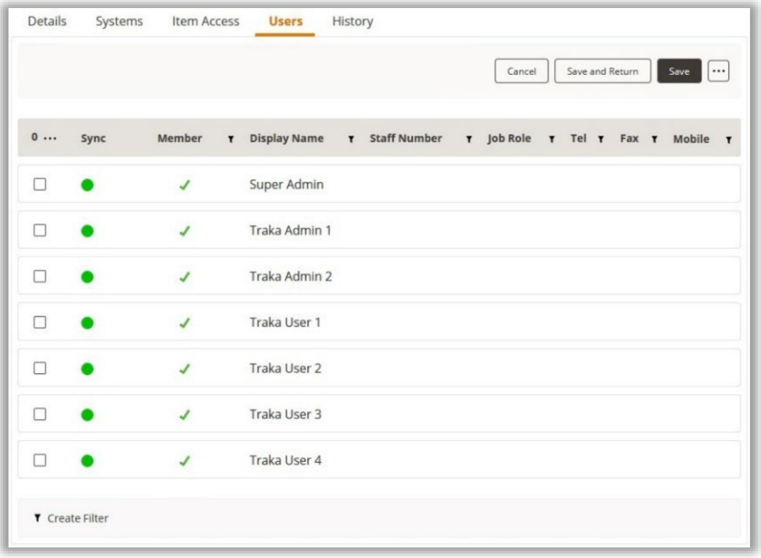
14. Select which users you wish to assign to the group.



15. Right click within the grid and select Add Selected Users to Item Access Group.



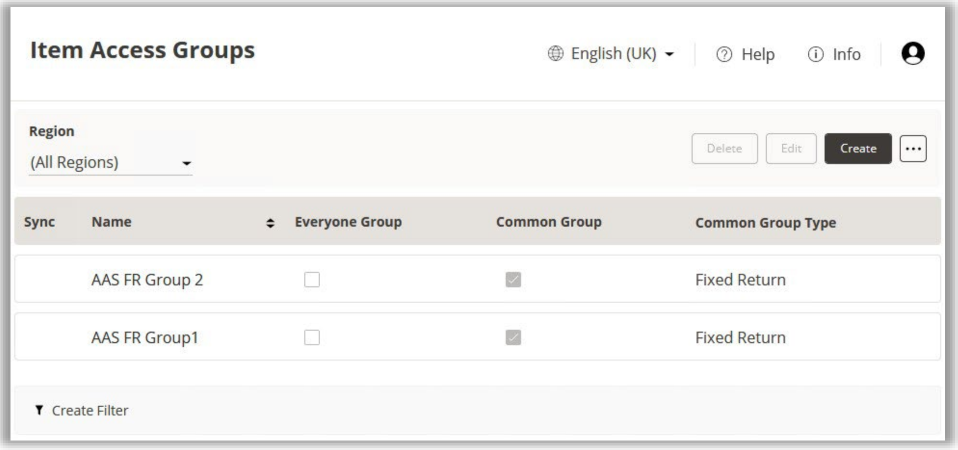
After confirmation, you will now see a green tick against the selected users indicating that they have now been added to the group.



16. Once completed, click on the **Save and Return** button.

Should you wish to make any changes to the Common Item Access Group, you may return to the **Item Access Groups** page and select the group you wish to edit and then click on the edit button. You will then be taken back through steps as shown above.

NOTE: If you have more items to which you wish to allow access to across multiple systems, they must each be assigned to a different Common Item Access Group as items can only be a member of a single group.



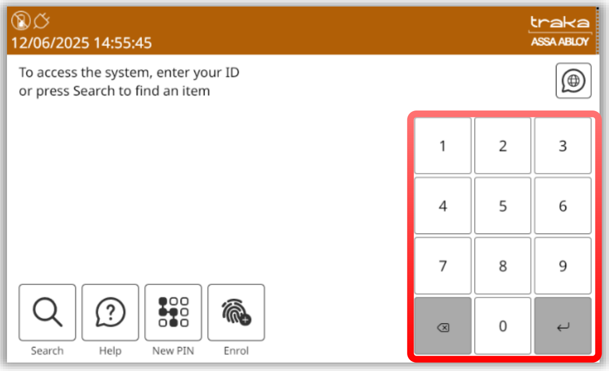
6.16.8 USING ALLOWANCE ACROSS SYSTEMS - (FIXED RETURN)

The following section describes the process of using Allowance Across Systems for Fixed Return systems. In this example, 2 systems have been configured to utilise the feature. 2 Common Item Access groups have been created with 4 items in each and divided across both systems. To demonstrate the functionality, the allowance on both groups has been set to 2.

A User is able to take up to the allowance for a group from just one of the systems or across both systems. For example, if group A consists of 2 items on System 1 and 2 items on System 2 then a user with access to the group could take one item from both systems or both items from just one of the systems. Once the allowance of 2 for that group has been met, they cannot remove any more items that belong to that group from either system.

6.16.9 TAKING & RETURNING ITEMS – NON-ADMIN USER - (FIXED RETURN)

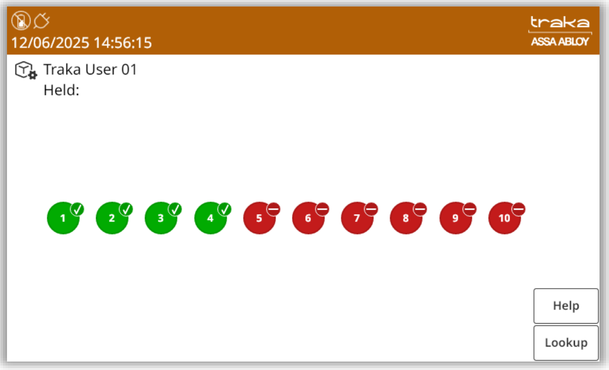
1. Log into system 1 using either keypad, credential or fingerprint.



System #1

System #2

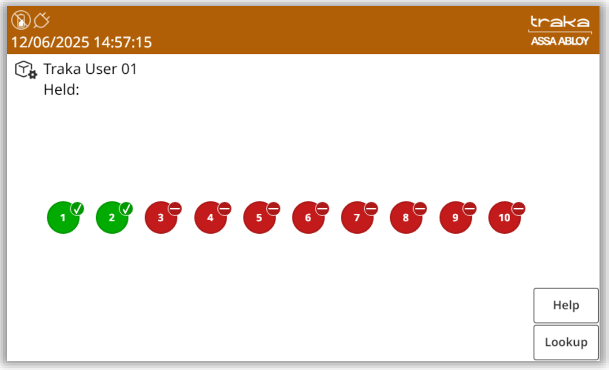
The door will now open, and the user will be able to remove available items according to their allowance. In the example below, 4 items are available based on the 2 Common Item Access Groups that the user has been assigned to.



System #1

System #2

Based on this example, if the user had only been granted access to 1 Common Item Access Group, then only 2 items from both systems would be available as shown below.



System #1

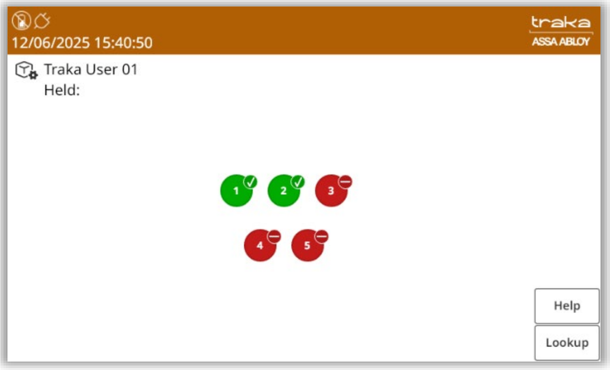
System #2

NOTE: Once an item has been taken and the user closes the door, they will automatically be logged out.

Providing the user does not remove all their allocated items from System #1, they may log out and then log into System #2 and take items up to the group's allowance.

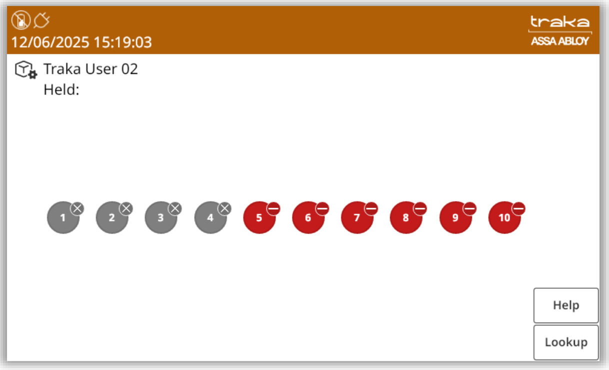
Once the user's item allowance for the Common Item Access Group on System #1 has been reached, the option to remove any more items from that group will not be available on either system. However, items from other Common Item Access Groups could still be available.

System #1



System #2

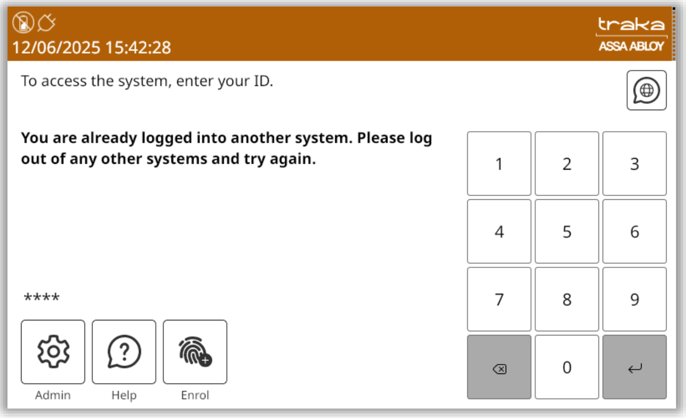
If a user removes all the available items from both Common Item Access Groups from System #1, there will be no more available items for other users to take from that system and the removed items will appear greyed out. However, they will still be able to take items from System #2 as required, until all available items from both groups in both systems have been taken.



System #1

System #2

NOTE: A non-admin user cannot log into more than 1 system at a time when Allowance Across Systems has been activated on that system. This does not apply to an admin user.

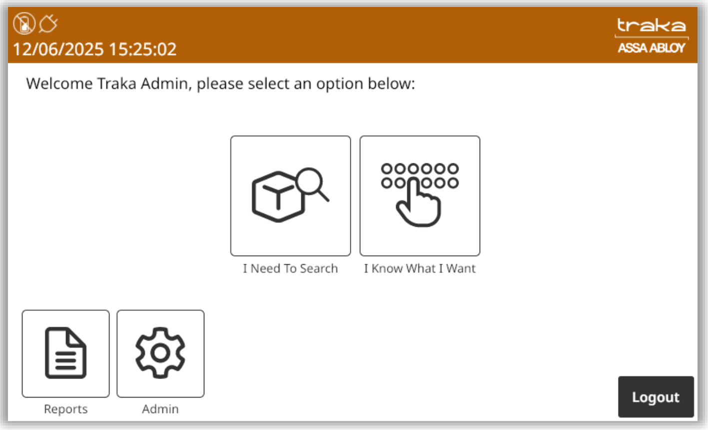


6.16.10 TAKING & RETURNING ITEMS – ADMIN USER (FIXED RETURN)

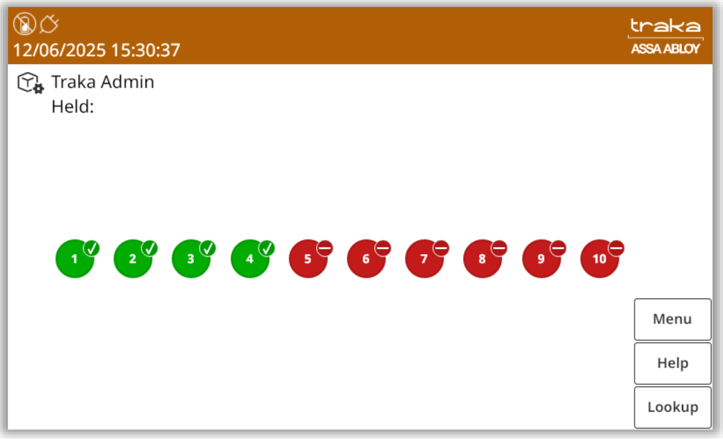
As an admin user, the same Allowance Across Systems rules will apply as a non-admin user. An admin user will however be able to perform admin activities in Traka Touch.

NOTE: The combinations for I Know What I Want or I Need To Search modes may be set in General Options on each system to determine the default Item release screens. The following examples are based around the I Know What I Want option.

1. Login to the system as an Admin User and select the required option for accessing items.

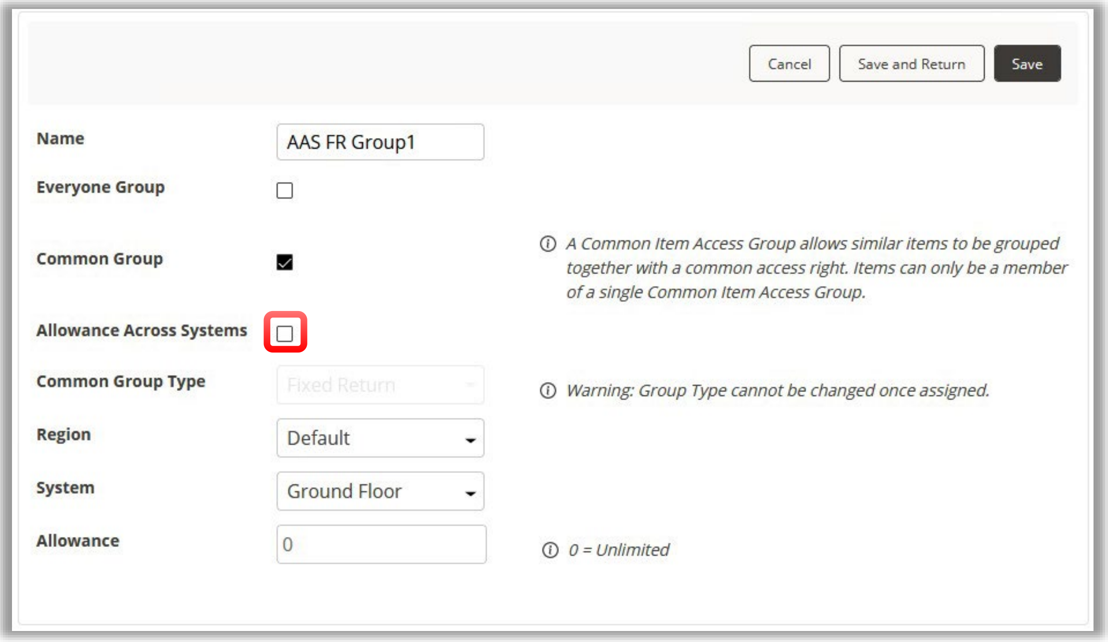


Once the door has opened, you will now be able to perform the same Allowance Across Systems activities as outlined in the previous section.



6.16.11 ALLOWANCE PER FIXED RETURN COMMON ITEM ACCESS GROUP

If the Allowance Across Systems check box is not ticked, then the option will only be available for the selected Fixed Return system.



In this instance, the functionality would behave the same as a system configured for Allowance per Fixed Return Common Item Access Group.

6.16.12 OVERRIDE OPTIONS - (FIXED RETURN)

There are 2 separate override options available for Allowance Across Systems for Fixed Return in TrakaWEB which can be set individually.

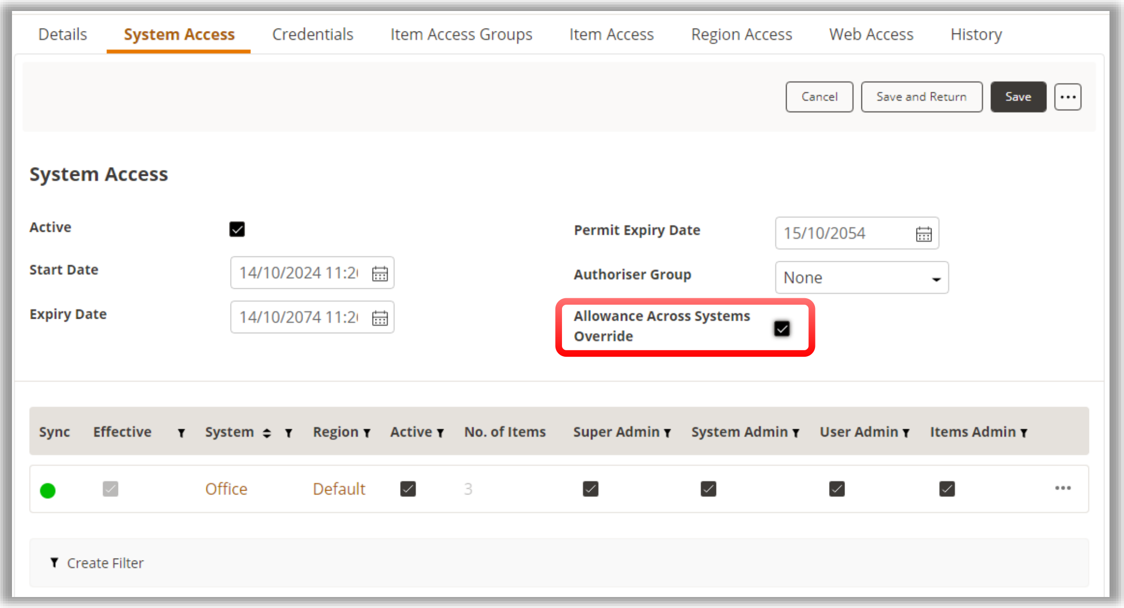
The override option granted to a user will give them permission to remove all items from the relevant Common Item Access Groups. A Common Item Access Group created with Allowance Across Systems selected is subject to the Allowance Across Systems Override. Any other Common Item Access Group or Item Access Group on the same system will be unaffected by selecting this option. The option to enable the permission is performed in TrakaWEB.

Allowance Across Systems Override:

This option will allow access to all items in Allowance Across Systems Common Item Access groups on any of the relevant systems. It will not override the allowance limits on any other groups on those systems.

1. From the Users Page, select a User to whom you wish to grant the override permission and then navigate to the **Edit User** page.

2. Place a tick in the check box for **Allowance Across Systems Override.**

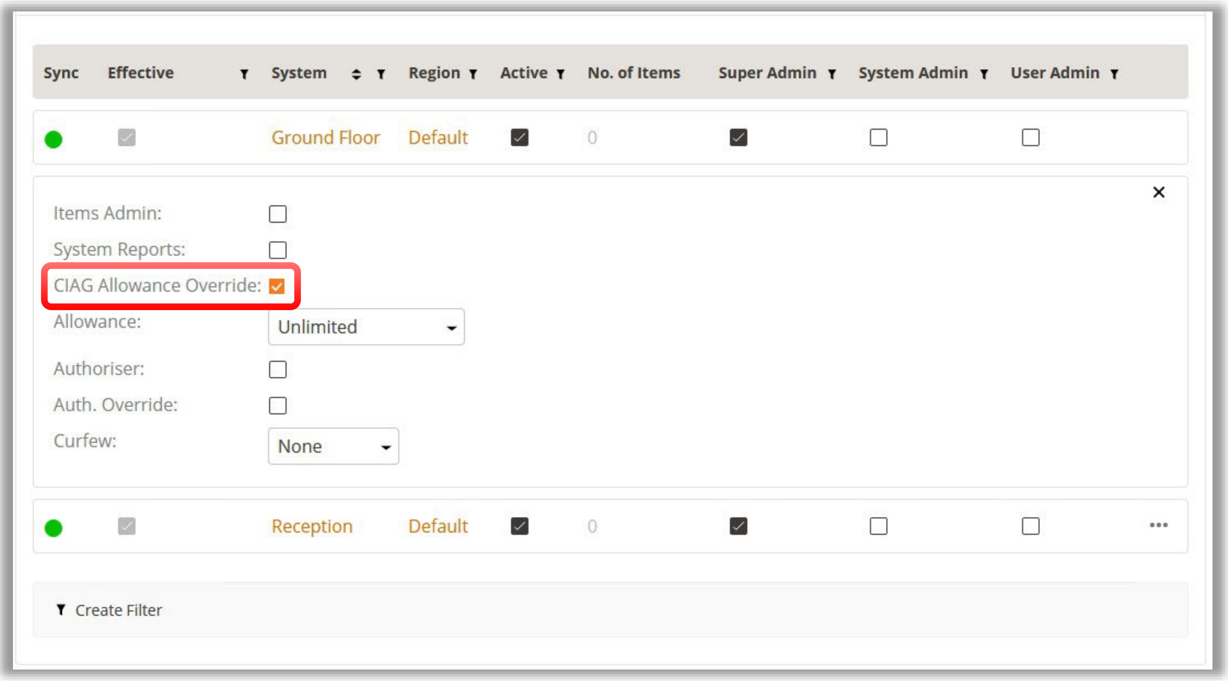


With the override permission enabled. The user will then be able to remove all the available items from across all systems.

CIAG Allowance Override:

This option removes the allowance limit for non-AAS Common Item Access Groups, so the user can now remove all items from their assigned groups.

Using the ellipsis button to expand the System Access Grid, you can additionally choose to allocate a user with the **CIAG Allowance Override.** This will be applicable to non-AAS Common Item Access Groups on a specific system.



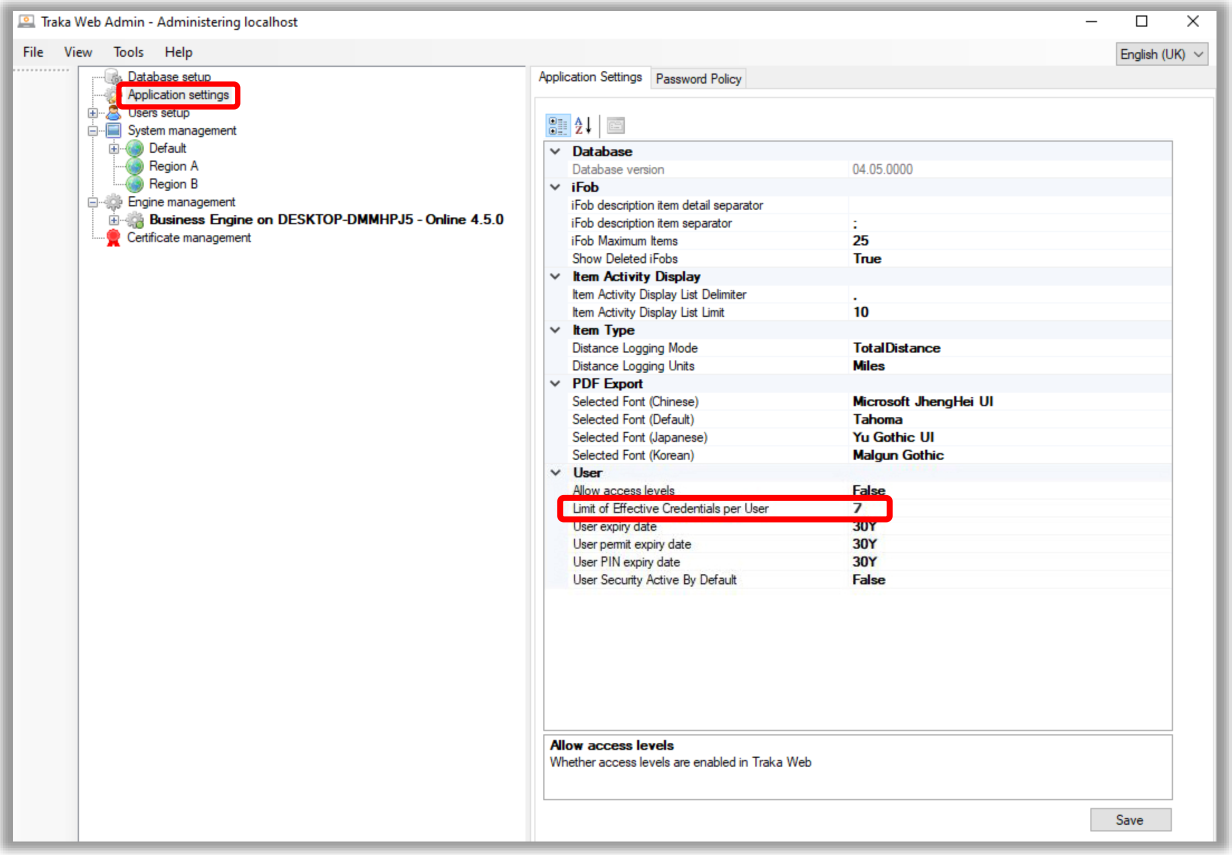
6.17 MULTIPLE CREDENTIALS

6.17.1 INTRODUCTION

Multiple Credentials is a non-cost feature, which was created to provide organisations with the ability to assign multiple/different types of credentials against single users. Multiple Credentials was designed to work alongside an Access Control System (PACS) where credentials in different forms can be accepted, i.e. Cardholder and Mobile Credential, or multiple different cards where PACS controls access to different areas.

NOTE: Multiple Credentials is not supported directly on 16bit systems. However, it is possible to mix a single credential system with one or more multiple credentials enabled systems via TrakaWEB.

NOTE: A single user can have an unlimited number of credentials assigned to a user record in Traka Web, but there are limits on how many credentials can be effective at Traka Touch. Therefore, a default limit of 3 effective credentials has been set which can be increased to a maximum of 7 effective credentials using the TrakaWEB Admin App.



6.17.2 PREREQUISITES

If Multiple Credentials was not requested during the production of your system, then a configuration file will be required to enable Multiple Credentials. Please contact Traka to obtain the configuration file for your system(s). To load the configuration file, please refer to **UD0258 – Traka Touch Pro User Guide**.

Upgrading a current single credential system to a multiple credentials system will involve an update to TrakaWEB. This update will automatically migrate the Card ID registered within a user record to become the default Credential ID within the multiple credentials enabled system. To change the default credential please see the Add/Delete Multiple Credentials to a New or Existing User section.

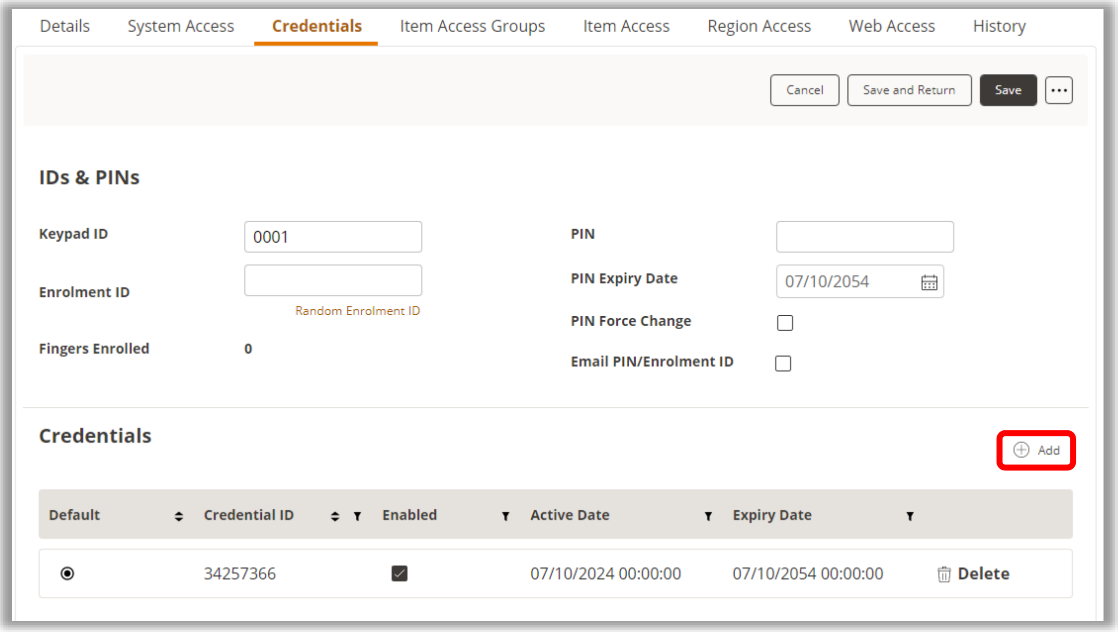
6.17.3 ADD/DELETE MULTIPLE CREDENTIALS TO A NEW OR EXISTING USER

When creating a new user or editing an existing user on TrakaWEB, it is possible to assign multiple Credential IDs if the Multiple Credentials feature has been enabled.

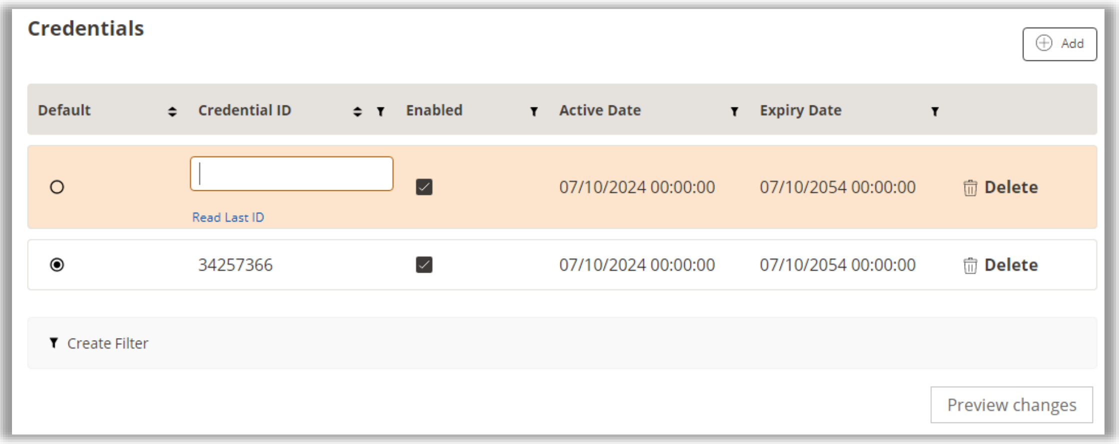
NOTE: Adding multiple credentials to a single user is only possible on TrakaWEB.

1. Create a new User or select the required User to **Edit**.
2. In the Credentials Tab, you will still see the **Add** button above the Credentials Grid. Clicking this will create a new Credential row in the Credentials grid.

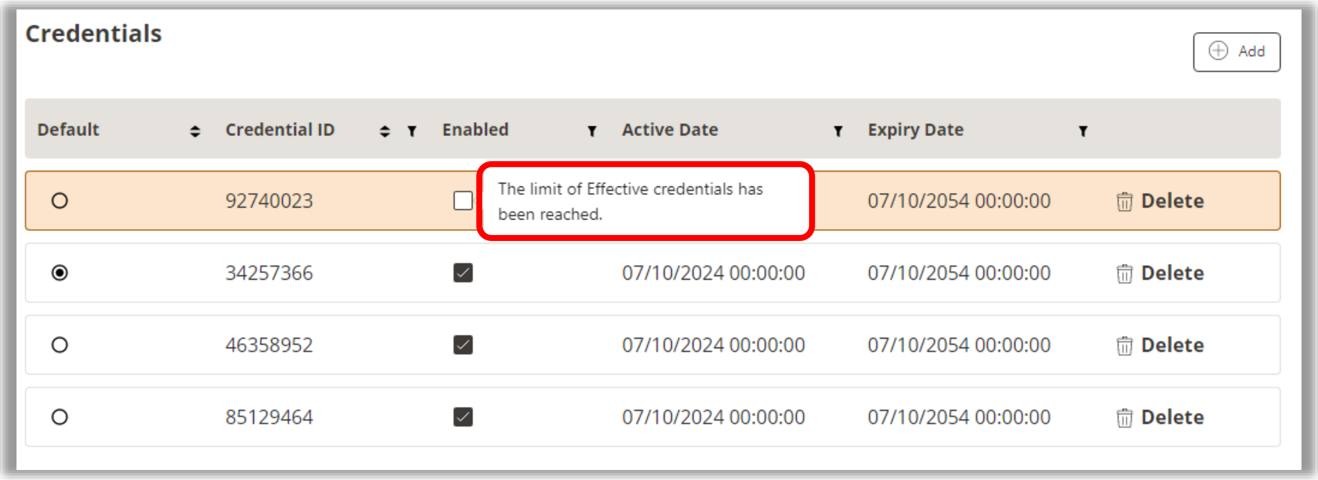
NOTE: To edit a credential that has not yet been saved, the required credential row must be selected first before the specific field.



3. Input the Credential ID as described in [Adding Users](). You can select whether this new credential will be the default credential by selecting the **Default** radio button on the left hand-side of the row. The default credential is essential for logging into single credential systems. A single credential system networked amongst multiple credential systems will only look for the default credential within TrakaWEB's User Database. It is possible to change the default credential by clicking the 'Default' radio button on the left-hand side of the relevant credential row.

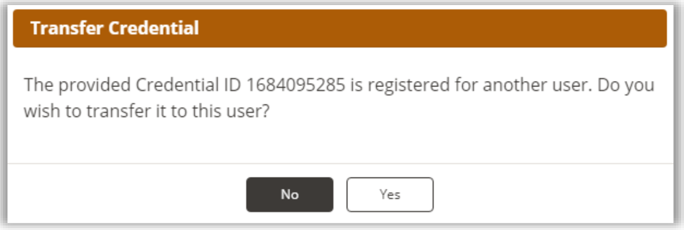


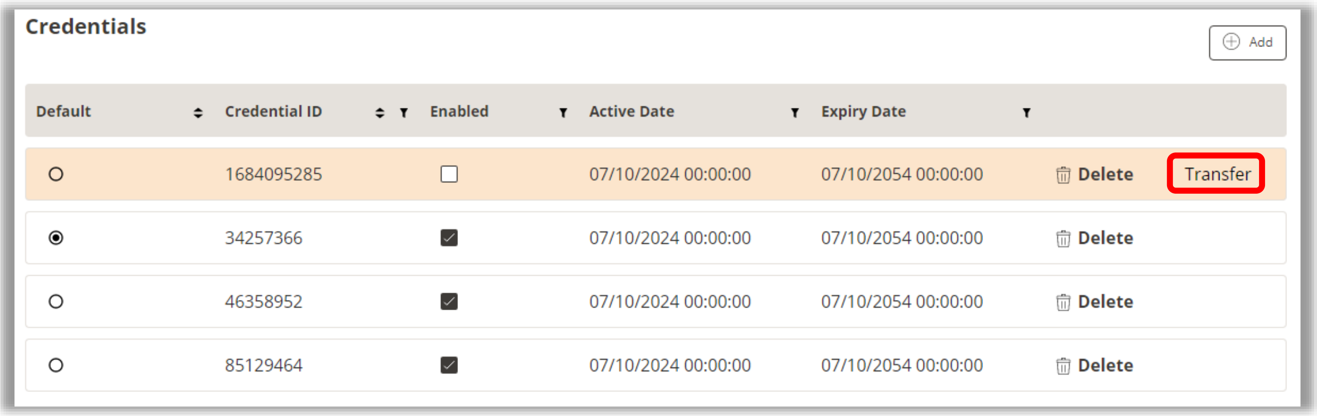
Multiple Credentials will allow an unlimited number of credentials to be assigned to a single user record in TrakaWEB, but there are limits on how many credentials can be effective at Traka Touch. Therefore, a default limit of 3 effective credentials has been set which can be increased to a maximum of 7 effective credentials using the TrakaWEB Admin App. An effective credential is dependent on the enabled check box being ticked and an active date range within the Credential Grid on TrakaWEB. TrakaWEB will prevent you from enabling more than the set Limit of Effective Credentials per user with a pop-up message explaining "The limit of Effective credentials has been reached."



NOTE: It is possible to set up a Job Scheduler to automatically disable expired credentials. Please refer to the [Disable Expired Credentials](#) section for further information.

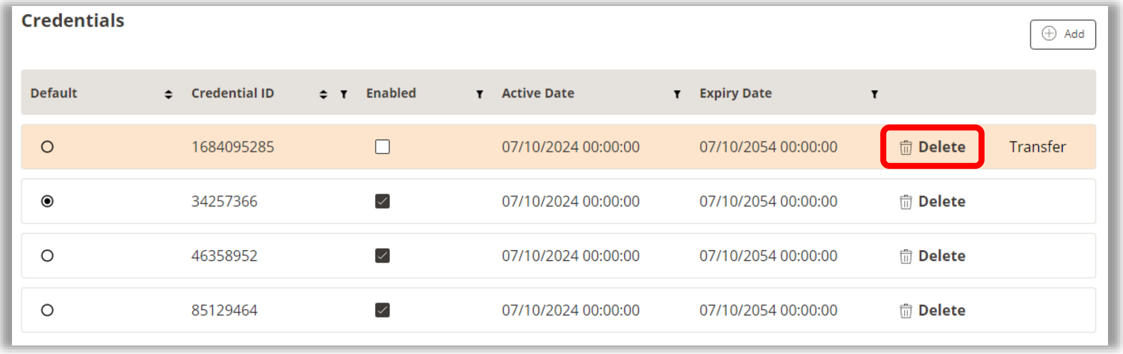
4. TrakaWEB will automatically check the database for duplicate Credential IDs. If a duplicate is found, you will be asked if you wish to transfer the ID from one user to another. Clicking '**No'** will prevent the Credential ID field from being saved and require the ID to be changed. Clicking '**Yes**' will input the Credential ID and the word 'Transfer' will appear on the right-hand side. The Credential ID will not be transferred until you click **Save**. Once saved, the Credential ID will be removed from the previous user and migrated to the user you are creating.

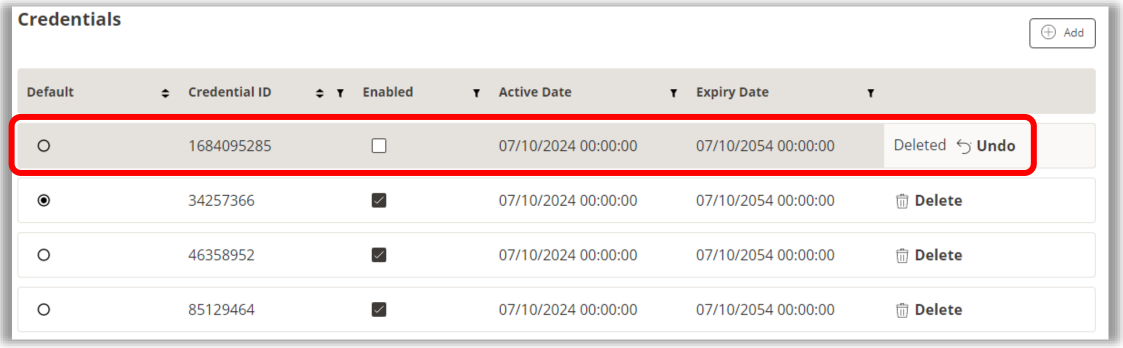




NOTE: A Credential ID cannot be edited once saved. It must first be deleted, and a new Credential created as explained in [Adding Users](#). However, all other fields in the Credential Row can be edited.

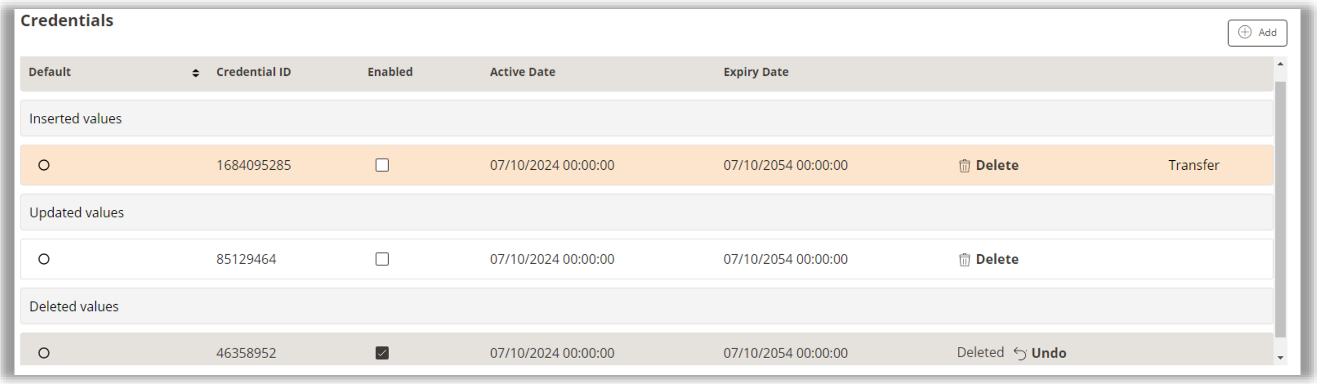
5. To delete a Credential, simply click on the required credential row and then click the **Delete** button. The deleted Credential will be greyed out and marked as 'Deleted'. An **Undo** button will now be listed, clicking this will undo the deletion.



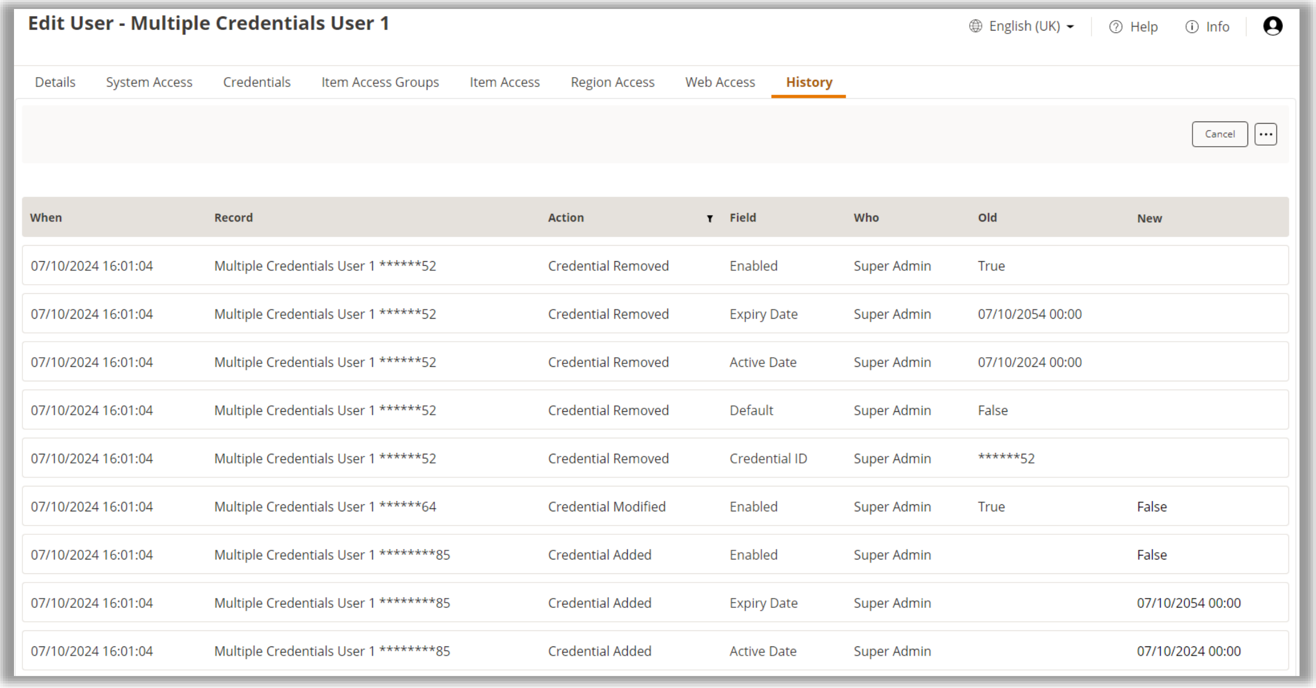


NOTE: It is possible to delete the Default Credential. If doing so, a small warning will appear at the top of the page (see below). If a user has more than one Credential assigned to them, then TrakaWEB will check for the next eldest credential after the Save button has been clicked and automatically assign this as the new default credential.

6. Any changes made within the Credentials Grid can be previewed using the Preview changes button in the bottom right-hand corner of the page. This is a particularly useful feature if many credentials are being added/edited as not all changes will be visible on the credential grid page you are on. Here, changes are organised into 3 types: **Inserted values**, **Updated values** and **Deleted values**. Any changes made are denoted by a colour change for the row or column. A pale orange denotes values that have been added and a light grey denotes values that have been deleted. When you have finished previewing the changes being made, click on **Hide preview** to return to the list of Credentials for the user.



7. Any changes made to a User and/or their Credentials will be listed in the History tab at the top of the Add/Edit User Page. The Credential ID's last 2 digits will be listed within this record, but all other digits will be starred out for security purposes.



When	Record	Action	Field	Who	Old	New
07/10/2024 16:01:04	Multiple Credentials User 1 ******52	Credential Removed	Enabled	Super Admin	True	
07/10/2024 16:01:04	Multiple Credentials User 1 ******52	Credential Removed	Expiry Date	Super Admin	07/10/2054 00:00	
07/10/2024 16:01:04	Multiple Credentials User 1 ******52	Credential Removed	Active Date	Super Admin	07/10/2024 00:00	
07/10/2024 16:01:04	Multiple Credentials User 1 ******52	Credential Removed	Default	Super Admin	False	
07/10/2024 16:01:04	Multiple Credentials User 1 ******52	Credential Removed	Credential ID	Super Admin	******52	
07/10/2024 16:01:04	Multiple Credentials User 1 ******64	Credential Modified	Enabled	Super Admin	True	False
07/10/2024 16:01:04	Multiple Credentials User 1 ********85	Credential Added	Enabled	Super Admin		False
07/10/2024 16:01:04	Multiple Credentials User 1 ********85	Credential Added	Expiry Date	Super Admin		07/10/2054 00:00
07/10/2024 16:01:04	Multiple Credentials User 1 ********85	Credential Added	Active Date	Super Admin		07/10/2024 00:00

8. When you are finished adding/editing Credentials, click the Save and Return button to go back to the user list.

6.18 TRAKAWEB 16BIT SUPPORT

6.18.1 INTRODUCTION

For customers that already have a number of 8/16bit systems and want to purchase some additional Traka Touch systems, Traka is proposing to continue its development of TrakaWEB support for Traka Touch as well as support for 16bit systems.

6.18.2 FEATURES

6.18.2.1 CORE FEATURE SUPPORT

- TrakaWEB core functionality
- Support for 16bit Key Cabinets & Lockers (both non-RFID and RFID)
- Automatic event download (~30 seconds)
- Keypad ID, Card Reader support
- Access Levels as used on Traka32 will be converted to the equivalent Item Access in TrakaWEB
- Regions
- Notifications (although notification rules will not automatically be imported)
- Integration via IEv2 only (LTTPS & RTUS not supported)
- Key Cabinet & Locker Fixed Return only initially
- Locking, non-locking, LED support Key Cabinet Receptor Strips
- No door, Single door, and Multi-door Key Cabinets
- FIFO on Lockers
- Item allowance (although Item allowance per access level not supported)
- Item & User Curfews. Relative curfews are limited to 24 hours on 16bit

6.18.2.2 NEW 16BIT FEATURES

- Sagem Biometrics enrolment at 16bit Systems will be implemented at the system using the Enrolment PIN method through TrakaWEB as available on Traka Touch
- iFob Setup for FRSS & RRSS will be implemented on 16bit via an Admin menu

6.18.2.3 UNSUPPORTED FEATURES

The following Communications features will not be supported:

- 8bit systems
- Serial and RS485 communications/protocol
- TCP/IP IPv6
- TCP/IP AES256 Encryption
- TACLS

6.18.3 PREREQUISITES

The following requirements must be met to allow 16bit support for TrakaWEB:

- The latest version of Traka32
- Requires 16bit systems with firmware version 4.00.12 or above for compatibility with TrakaWEB
- If a system is operating on an earlier software or firmware version, it will need to be upgraded to the versions above before migrating to TrakaWEB
- 8bit systems will need to be upgraded to 16bit first
- TCP/IP only will be supported. Systems using RS232 or RS485 will have to be upgraded with a Lantronix Xport or UDS2100
- The latest version of TrakaWEB

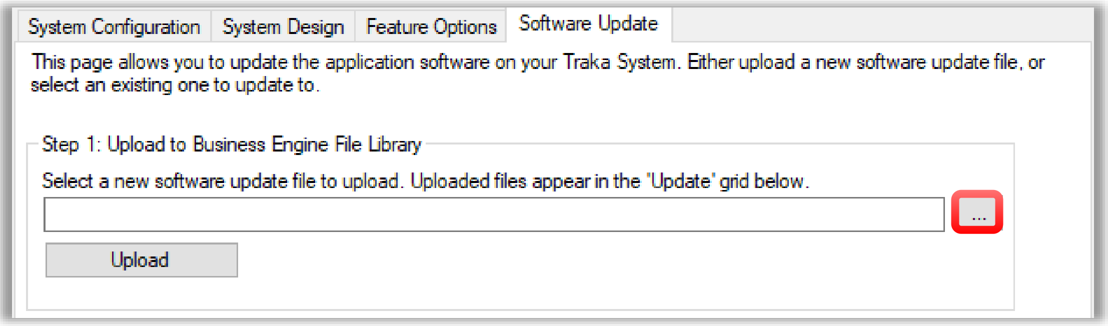
6.18.4 LIMITATIONS FOR 16BIT SYSTEMS

- 16bit Systems have a 70-character limit for descriptions
- Display names are limited to 17 characters
- Pin numbers have a 6-digit limit
- Simultaneous Keypad ID and Credential ID is not supported
- Secondary PIN Support will remain limited on 16bit compared to Traka Touch. E.g., multiple length PIN, PIN expiry, force PIN change on next login will not be supported on 16bit but only on Touch
- New features available on Touch will not be supported on 16bit

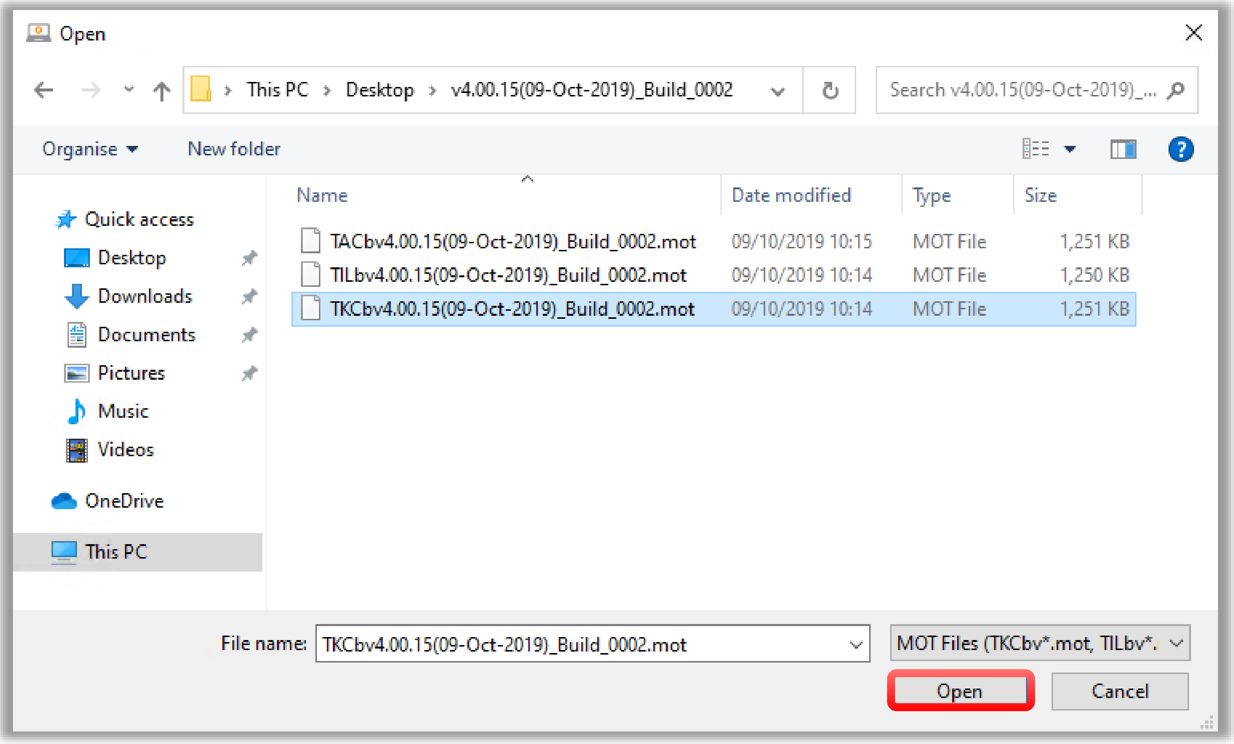
6.18.5 16BIT FIRMWARE UPGRADE USING THE ADMIN APP

The process of upgrading the Firmware on a 16bit system using the Admin App is almost identical to the Traka Touch Application upgrade.

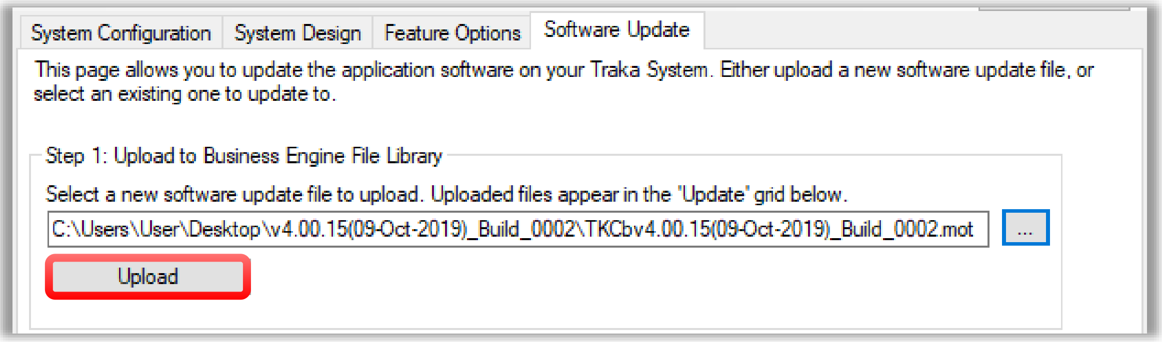
1. Within the Admin App, select the system you wish to upgrade the firmware to and then click on the **Software Update** tab.
2. Click on the button to the right of the grid as shown below. If the firmware version you require appears in the list, skip ahead to step 5.
3. If the firmware version you require is not present in the field, you will need to locate it.



4. Navigate to the Firmware file to be uploaded. By default, the system will be looking for a file with the **.mot** extension. Click on **Open**.

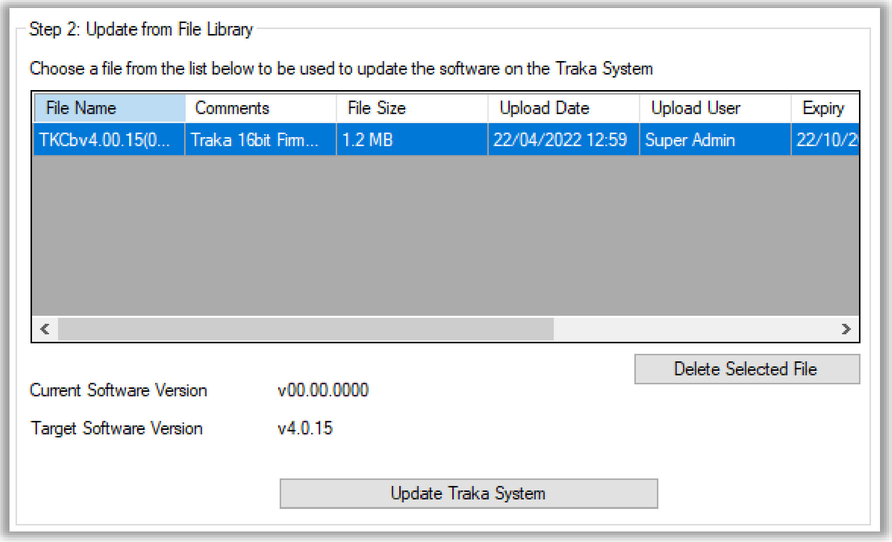


5. The selected file will appear in the grid. Click on **Upload**.

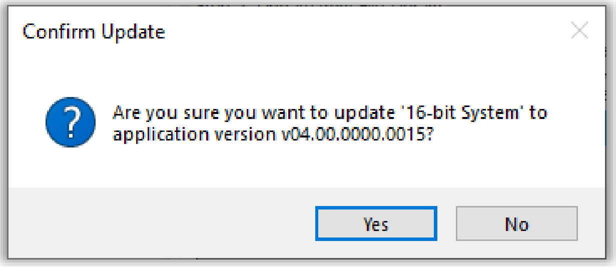


Clicking on upload will initiate the sending of the file to the database via the Business Engine.

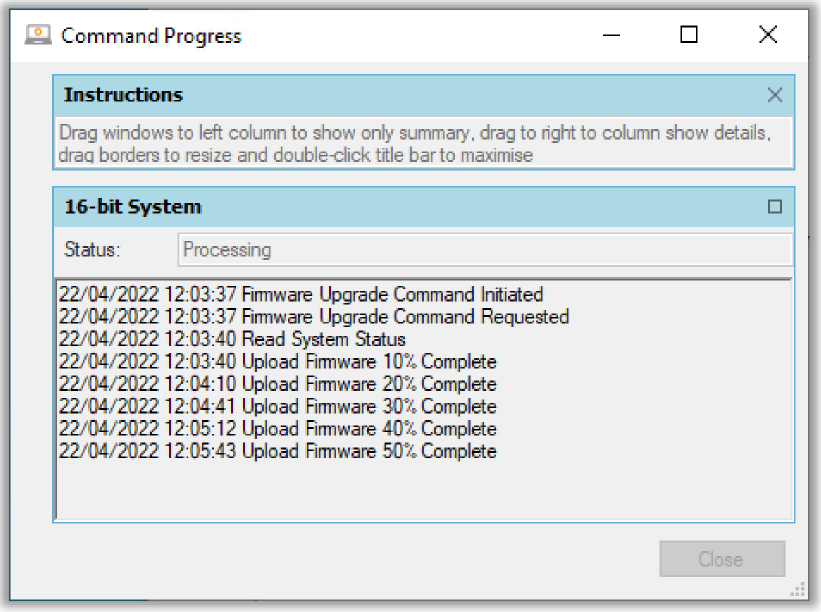
6. Once the file has been uploaded, it will appear on the list.



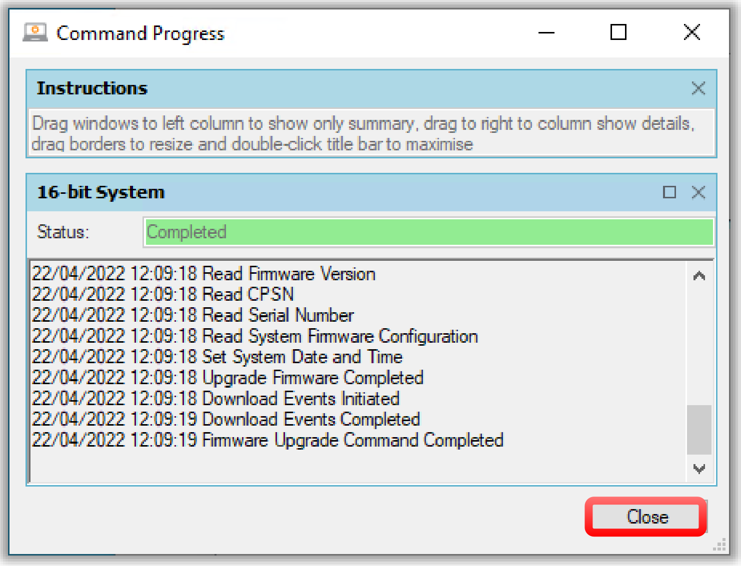
7. Click on the row and then click on **Update Traka System**. A window will show asking you to confirm.



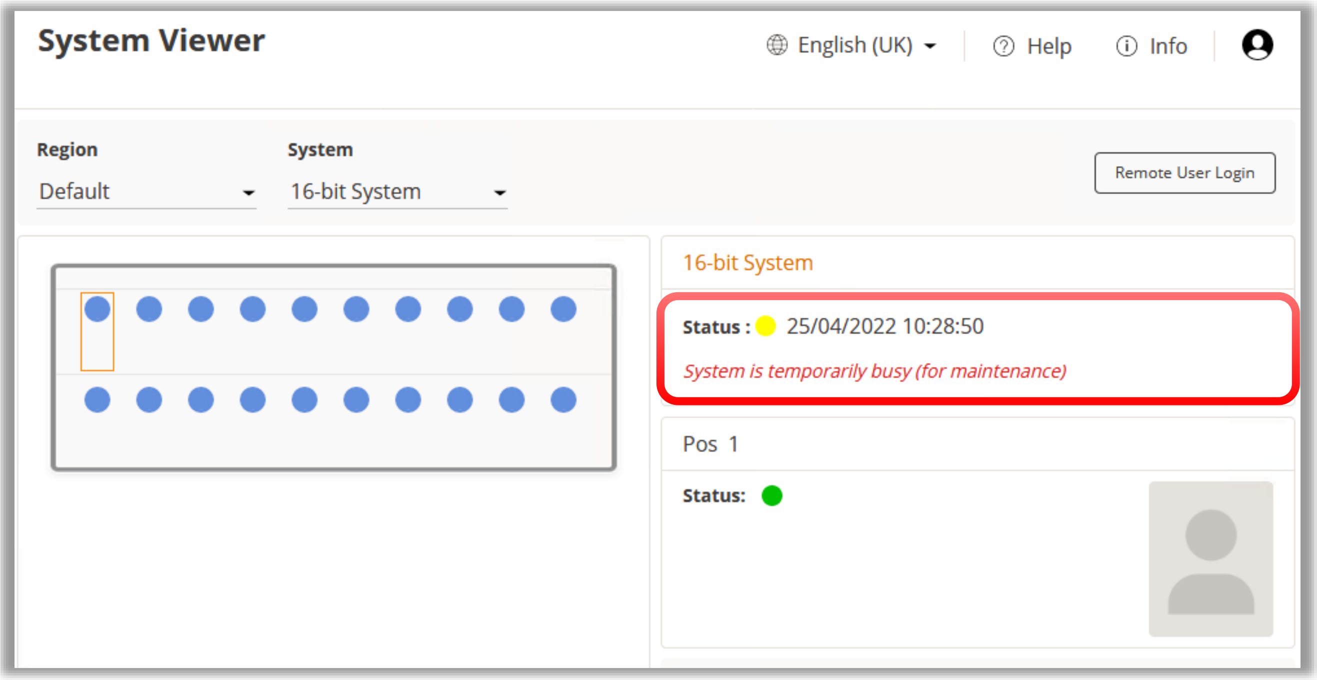
TrakaWEB will decide whether the new firmware requires a Full Upload after the upgrade process has completed. If yes, a new window will appear, and it will display the status of the operation.



8. Once the upload has completed, click on **Close**.

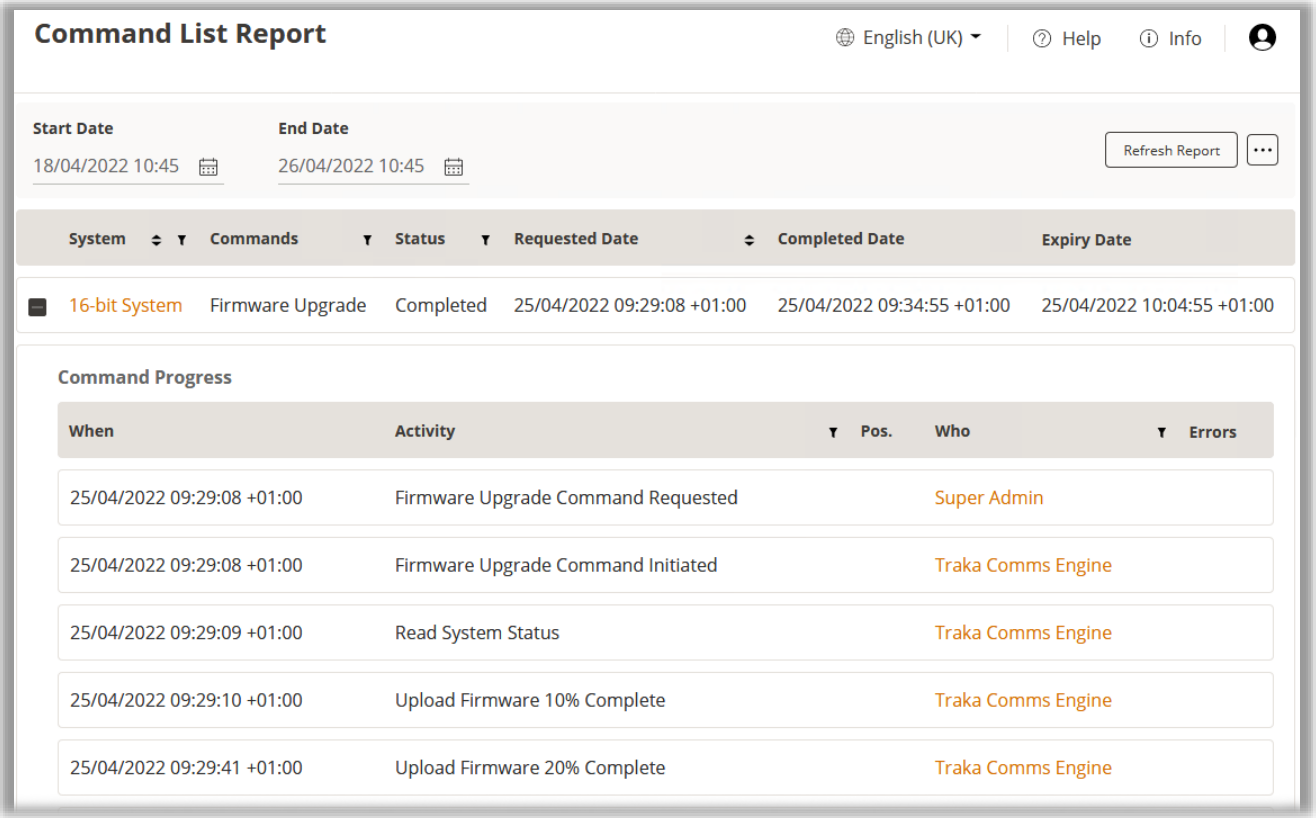


NOTE: The system will be unavailable during the upgrade process. The System View will show that the 'System is temporarily busy'.



The Command List Report will also show progress of the upgrade.

9. Open the Command List Report in the Diagnostics report section. Each command can be expanded by clicking on the sign to show the detailed Command Progress events that occurred during the Command processing at the system.

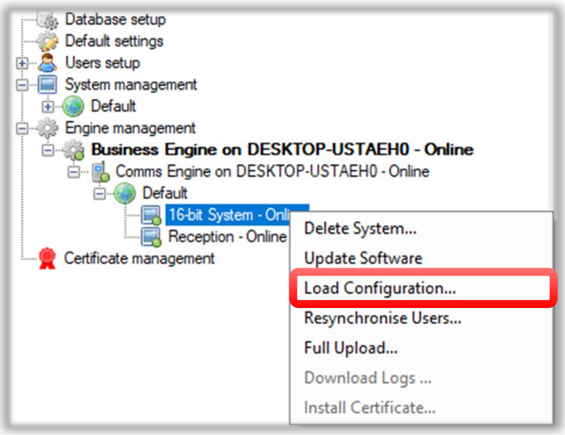


NOTE: The actual firmware upgrade process is the same as used by Traka32.

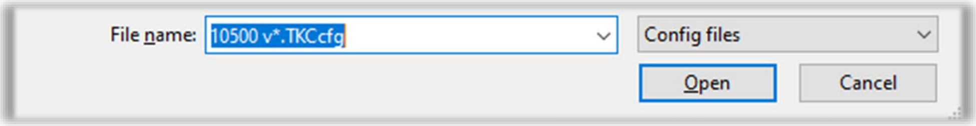
6.18.6 UPLOAD CONFIG FILE USING THE ADMIN APP

NOTE: Each 16bit system comes with its own unique Config Files. If you have not got an appropriate Config File for the system you are accessing, contact Traka to obtain one.

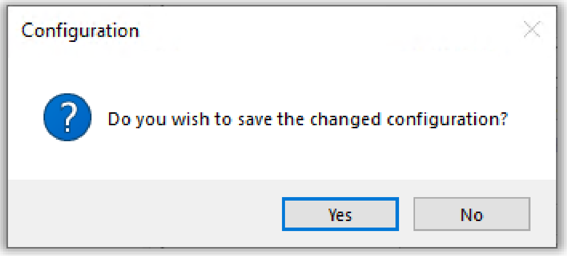
1. From the TrakaWEB Admin App, select the 16bit system on which you need to upload a Config file, right-click on it and select the **Load Configuration** option.



2. A new window will open where you will need to navigate to the Config File for your system on the local PC. By default, the system will look for config files with the extension **.TKCcfg**. When you have located and selected the file, click on **Open**.



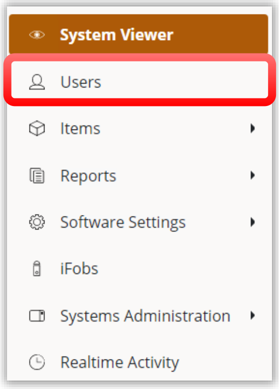
3. The system will then ask you to confirm the changes in the configuration. Select **Yes**.



4. The system will confirm the operation and will save the new configuration.

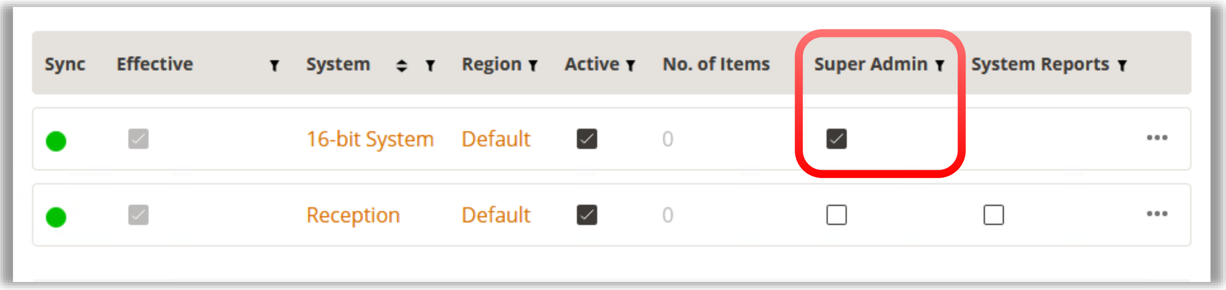
6.18.7 ADD ADMIN USER

1. In TrakaWEB, navigate to the **Users** menu.



2. Find the user who will need to be the Super Admin user on the 16bit system you are accessing and edit this user.

3. Navigate to the **System Access** tab, locate the 16bit system, and check the box in the Super Admin column to confirm your user as the Super Admin on that unit.



4. Click on **Save and Return**. Wait for approximately 30 seconds for the changes to be synchronised with the system. Refresh the screen in your TrakaWEB to see the status update.

6.18.8 SET UP IFOBS

1. Access the 16bit system as the Super Admin user whom you nominated in the previous section.
2. Press the **#** key on the keypad to access Admin Menu.

3. Press the **1** key to select the Item Setup.

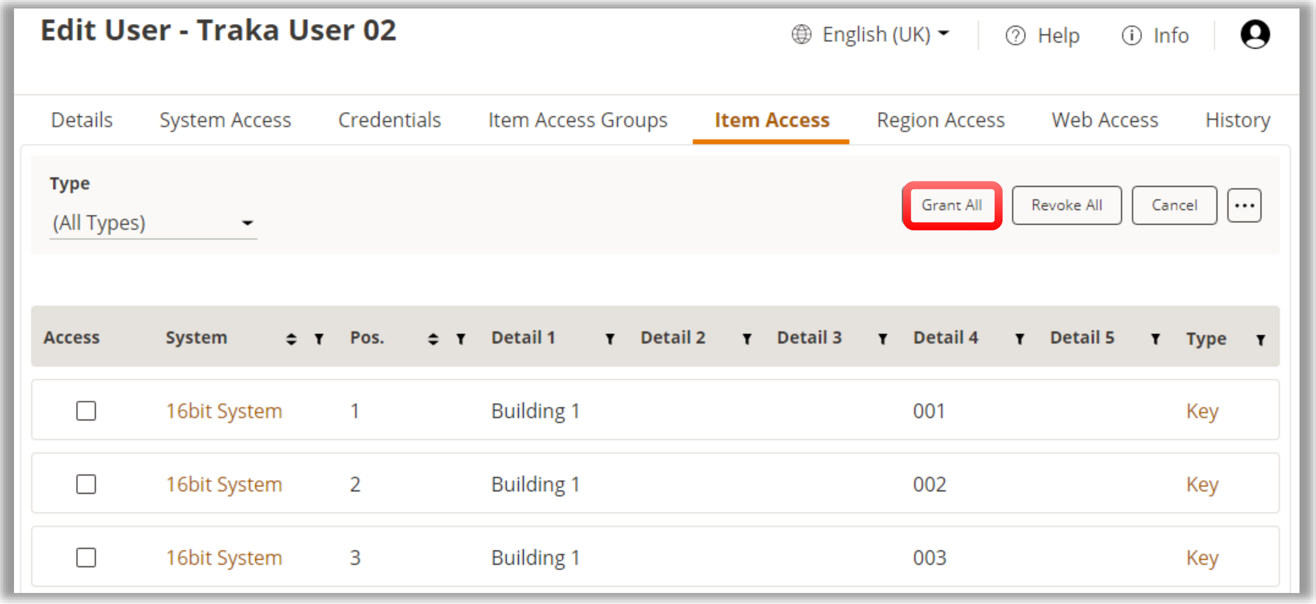
4. The system will ask you to confirm. Press the **#** key to select Yes.

6.18.9 SET ITEM ACCESS

Before any items can be removed from the system, their access must be assigned to a user.

1. In TrakaWEB, select **Users** from the Navigation Menu.
2. At the Users' page, select the user you wish to edit or, alternatively, double-click on the username.
3. At the Edit User page, click on the **Item Access** tab.

4. The Item Access page will show all the items that can be allocated to that user. In the access column, select to assign individual items to the user or click on **Grant All** to assign all the items.



5. When the selection of items has been completed, click on **Save** to continue.

The user will now be able to remove items from the system using their Keypad ID, Access Card, or Fingerprint.

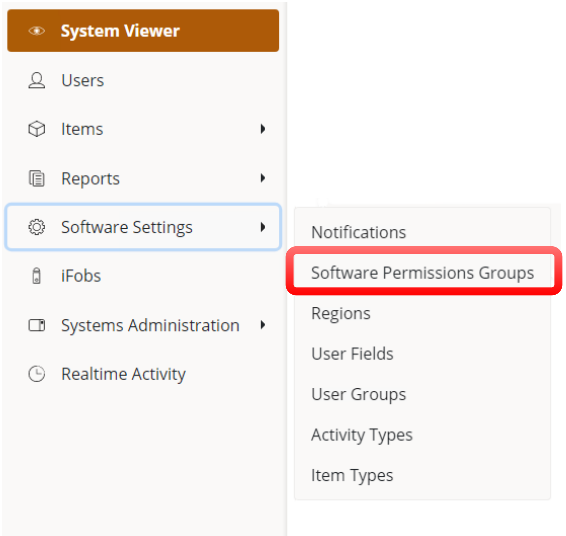
6.18.10 PERFORM A FULL UPLOAD FROM THE WEB CLIENT

6.18.10.1 ASSIGN SOFTWARE PERMISSIONS TO PERFORM A FULL UPLOAD

NOTE: To read more on how to create and edit Software Permissions Groups, refer to the Software Permissions Groups section in this document.

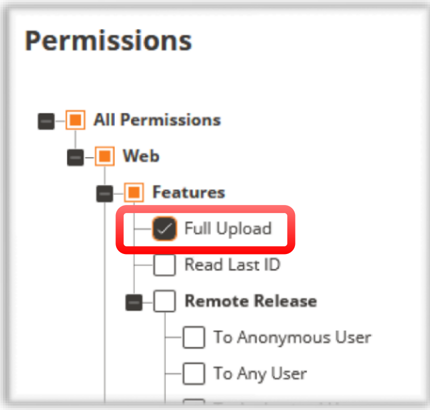
NOTE: Only a user with appropriate permissions will be able to perform this task.

1. From The Navigation Menu, select **Software Settings** and then **Software Permissions Groups**.



2. If you wish to edit permissions for an existing Software Permissions Group, click on the **Edit** button. If you wish to create a new group which will possess the required software permissions, click on **Create**.

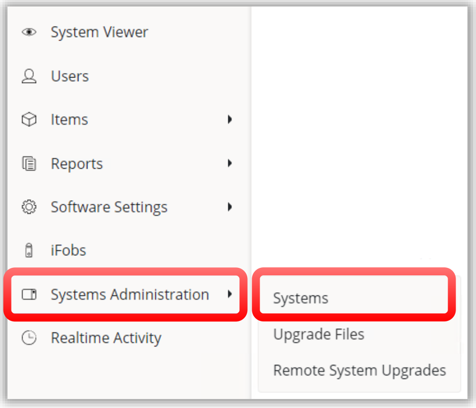
3. From the chosen Permissions list, click the check box next to **Full Upload.**



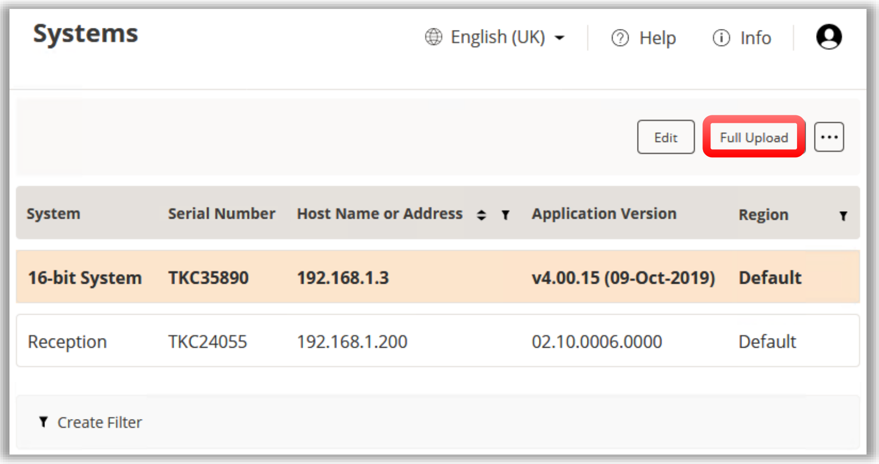
4. Once you have assigned the permissions, click on Save and Return. If you have created a new Software Permissions Group, you will now be able to assign TrakaWEB users to it. To read more on how to do that, refer to the Software Permissions Groups section in this document.

6.18.10.2 PERFORM A FULL UPLOAD AS A TRAKAWEB USER

1. To perform a Full Upload on a 16bit system from TrakaWEB Client, navigate to **Systems** from the **Systems Administration** tab within the Navigation Menu.

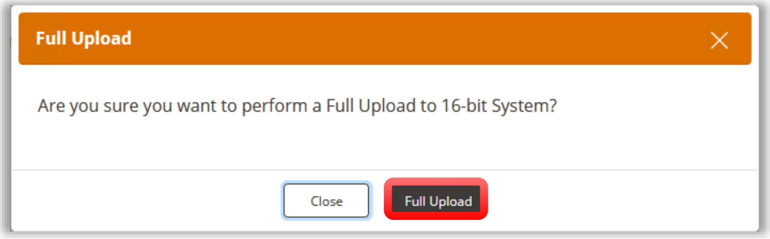


2. Select the 16bit system in the grid and click the **Full Upload** button.

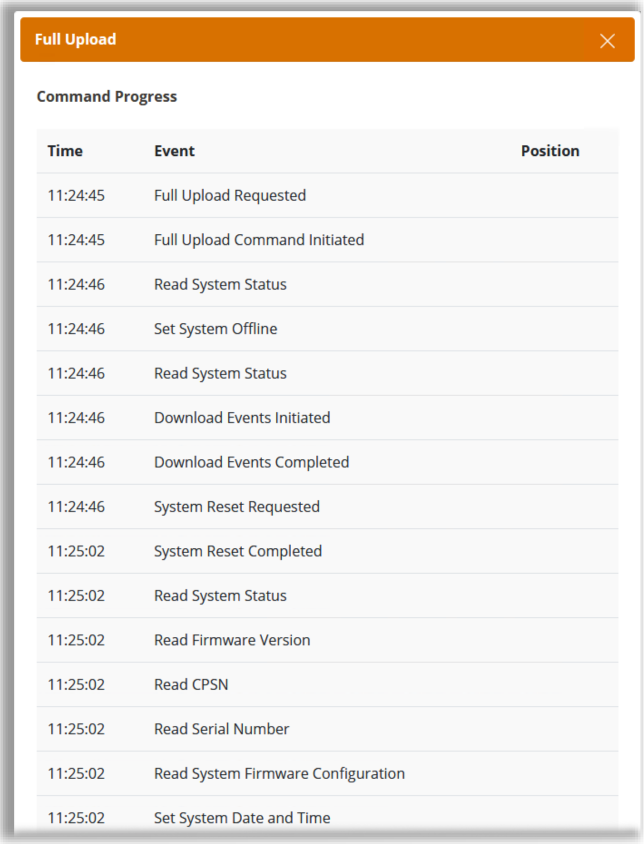


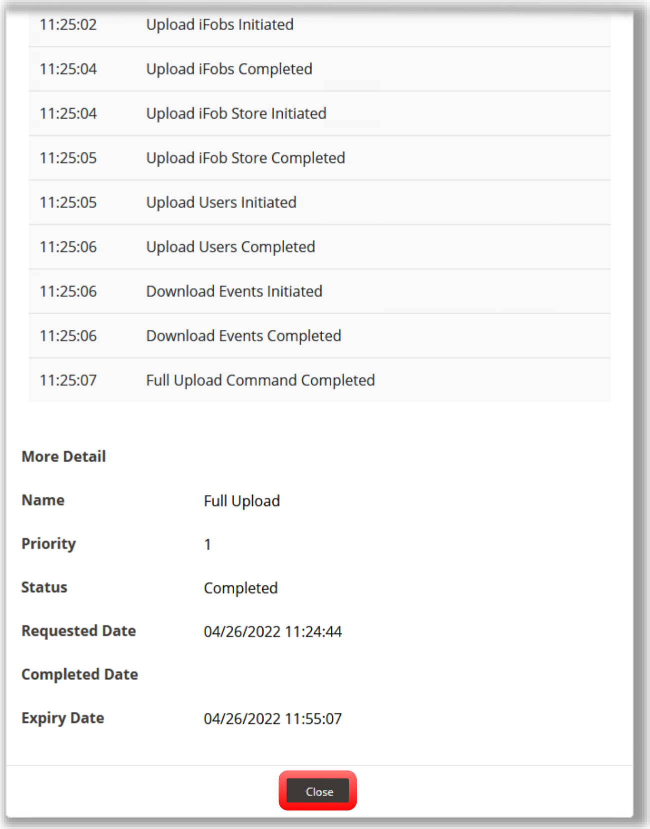
NOTE: This function will only be effective on a 16bit system.

3. At the next confirmation window, click on **Full Upload** to continue.



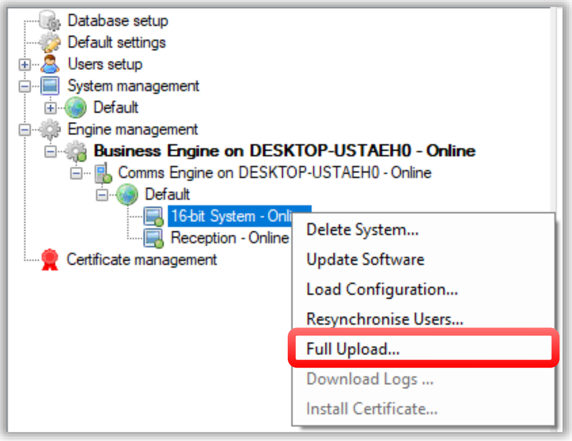
4. The command progress window will be displayed. Once the Full Upload is complete, click on **Close** to continue.



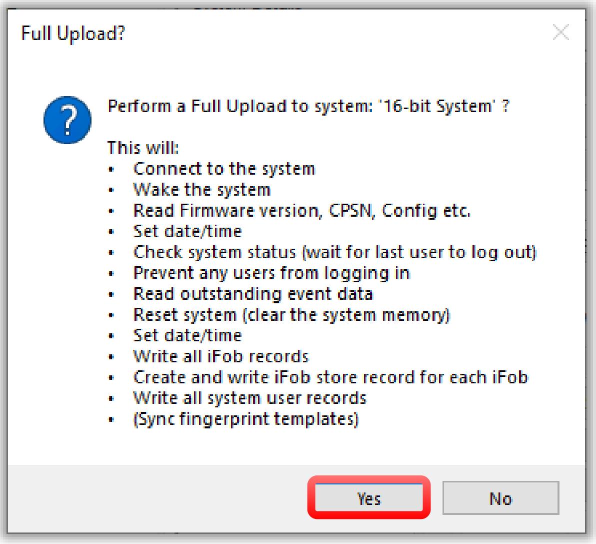


6.18.11 PERFORM A FULL UPLOAD FROM THE ADMINISTRATION APPLICATION

1. From within the Admin App, right-click on the 16bit system and select the **Full Upload** option.



2. At the next window, click **Yes** to confirm the Full Upload.

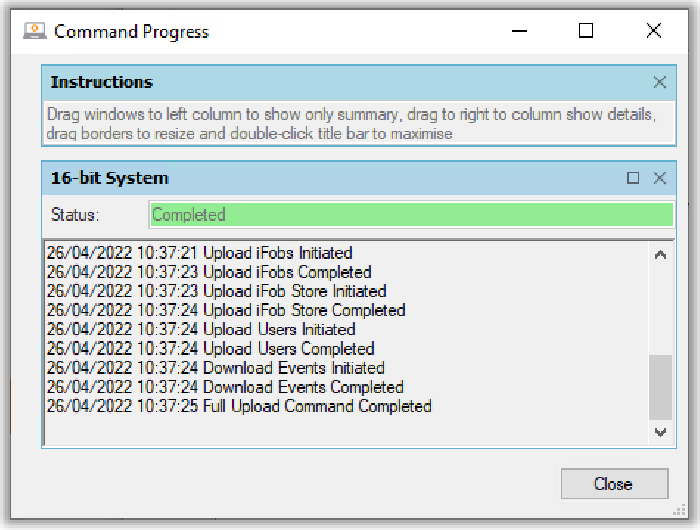


NOTE: If the system is in use at the time the Full Upload command is given, the system will wait for the user to log out before beginning the process.

NOTE: If the system is performing AutoComms when the Full Upload command is given, it will be cancelled at the earliest point that is safe to do so.

NOTE: Once the Full Upload process starts, the system will prevent any users from logging in.

A Command Progress window will now appear. The upload process can take several minutes to complete.



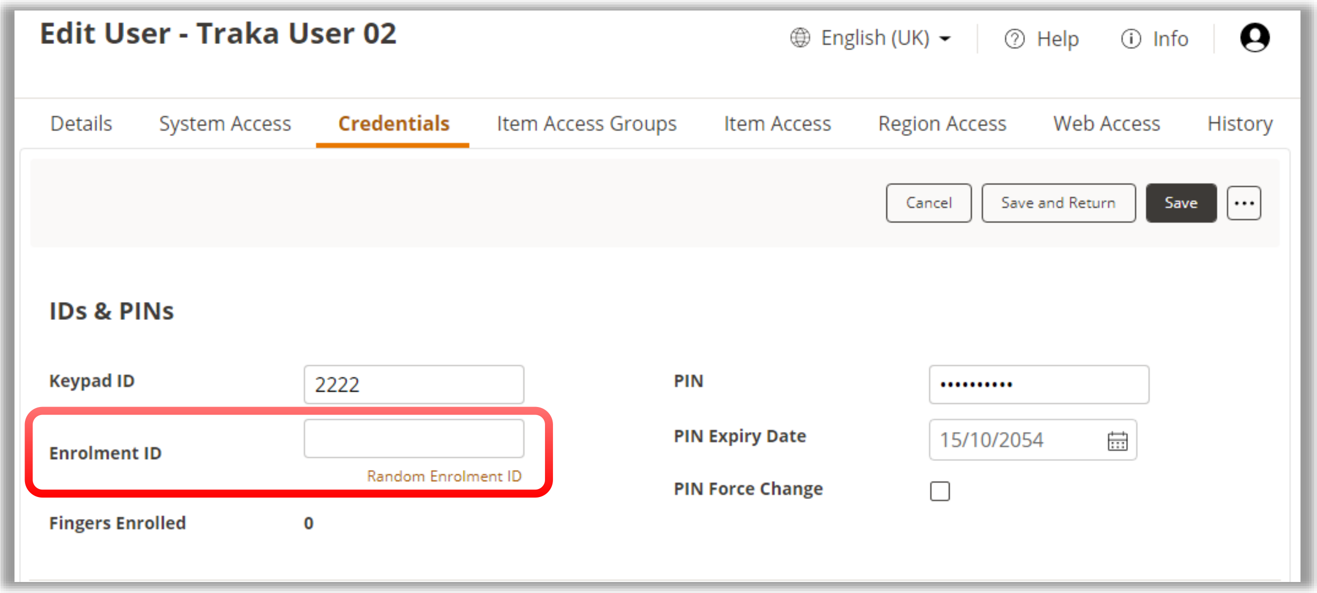
3. Once the Full Upload has completed, click on the **Close** button.

6.18.12 ENROL A BIOMETRIC TEMPLATE ON A 16BIT SYSTEM

Users with User Edit Permissions can allocate an enrolment ID to other users. The Enrolment ID is a 6-digit number, which can be created manually or randomly. A user can then access the system with their enrolment ID to enrol their fingerprint.

1. Select the user you wish to grant an enrolment ID to and select the **Credentials** tab within the Edit User page.

2. The Enrolment ID can be entered either manually into the blank field or by clicking on the **Random Enrolment ID** button. Once completed, click on the **Save** button to continue.



3. At the 16bit System, press the **0** button on the keypad. The screen will display the following message:

4. Enter the 6-digit Enrolment ID followed by the **#** key.

If the 6-digit enrolment number is valid, the following screen will be displayed:

5. Press the **#** key on the keypad and then follow the on-screen instructions for enrolling a fingerprint using the biometric reader.

Once completed, the following screen will be displayed:

NOTE: To access the system, the user first presses the # key and then places their finger on the reader.

6.18.13 SYNCHRONISE AND DOWNLOAD EVENTS WITH THE 16BIT SYSTEM

The Comms Engine will ensure that the 16bit system is kept updated by performing the following processes **every 30 seconds**:

- Making sure that the system is online and ready
- Making sure that the Firmware Version number is compatible
- Making sure that the Date & Time is set correctly
- Making sure that the CPSN has not changed
- Reading new events from the System
- Sending the changed User records to the system
- Sending the changed iFob records to the system
- Sending the changed User Biometric templates to the System

There will be certain constraints placed upon some of the data sent to the 16bit systems compared with Traka Touch. These include:

- iFobs and Items allocated to a 16bit System will have their descriptions limited to a maximum of 70 characters when edited in TrakaWEB. If an iFob/Item is moved from a Traka Touch system to a 16bit System, the description will be truncated if it exceeds 70 characters.
- If you have one or more 16bit Systems in your database, the maximum allowable length of the User Display Name field is 17 characters. If the Display Name Override tick box is not ticked and the automatically generated name is longer than 17 characters, it will be recalculated before being sent.
- PIN numbers will be limited to 6 digits.
- Due to the fact that 16bit systems store a unique key that will remain identical across all 16bit systems, there can be no more than 65,535 users active across all 16bit systems at any one time. TrakaWEB will allocate a unique key that will remain identical across all 16bit systems. Traka Touch is not affected by this limitation.

6.18.14 USE A TRAKAWEB KEYPAD ID/CREDENTIAL ID WITH OPTIONAL PIN ON 16BIT SYSTEMS

16bit systems support identifying users with either a card reader or the numeric keypad. This is determined by the Reader configuration supplied by the Traka Technical Support Department.

Similarly, TrakaWEB supports a Credential ID and a Keypad ID, which can be entered in the user Credentials tab on the Edit User page. The main difference is that TrakaWEB will support having users with both simultaneously and can be configured for both systems with readers and systems without readers.

The following rules will apply.

<u>16bit Firmware with Card Reader Enabled without 'Credential and/or PIN' Option</u>

Fields in TrakaWEB

- Keypad ID is not used
- If the 16bit System has a Card Reader configured, TrakaWEB maps the default Credential ID to the **Primary ID Field**
- TrakaWEB maps the PIN field to the **Secondary ID Field.** (The system will only prompt for the Secondary PIN if it is supplied)

Behaviour at Cabinet

- **Credential ID only:** System will accept Credential without a Keypad ID
- **Credential ID & PIN:** System will accept Credential and prompt for PIN

<u>16bit Firmware with Keypad Only Configuration</u>

NOTE: The 'Credential and/or PIN' option is not designed to be used with keypad only systems.

Fields in TrakaWEB

- The Keypad ID is the Primary PIN
- The Credential Grid is not used
- The PIN field is used for Secondary PIN (This is optional – The system will only prompt for Secondary PIN if supplied)

Behaviour at Cabinet

- **Keypad ID only:** System will accept Keypad ID
- **Keypad ID and PIN:** System will accept Keypad ID and prompt for PIN

<u>16bit Firmware with Card Reader & 'Credential and/or PIN' options</u>

WARNING: If switching the 'Credential and/or PIN' option on or off on an existing system, a full sync must be carried out to ensure that the correct data is synchronised with the system.

NOTE: There is no option available on 16bit to enforce both Credential *and* PIN if the keypad ID is not supplied.

Fields in TrakaWEB

- Keypad ID is optionally used for Primary PIN
- Credential Grid is used for Credentials, i.e. access cards or mobile credential.
- PIN Field is optionally used for Secondary PIN

Behaviour at Cabinet

- **Credential ID Only:** System will accept Credential without a Keypad ID
- **Keypad ID Only:** System will accept Credential without a Keypad ID
- **PIN Only:** Not Supported
- **Credential ID and Keypad ID supplied**
    - System will accept Credential *and* Keypad ID *or*
    - System will just accept Keypad ID only
- **Credential ID and PIN supplied**
    - System will accept Credential *and* PIN

NOTE: The user will not be able to access the system with just their PIN.

NOTE: This underlying "User requires Credential *and* PIN to access Cabinet" flag would be set in this case.

- **Credential ID and Keypad ID and PIN supplied**

NOTE: This is not a valid combination for 16bit and so would behave just like a Credential ID and Keypad ID being supplied, i.e., the PIN will be ignored.

6.18.1516 BIT SYSTEM SUPPORT FOR ALL CREDENTIAL READERS AND INTERFACES UNDER TRAKA32

As all of the Card Reader configuration and data is handled solely within the 16bit firmware, TrakaWEB will support all of the current and foreseeable Card Reader and hardware interfaces.

Card Reader configuration settings which are contained within the 16bit configuration file are always sent unchanged to the 16bit system.

6.18.16 10-WAY RECEPTOR STRIPS SUPPORTED BY THE CURRENT 16BIT FIRMWARE

The available options are as follows:

- 10-way only
- Locking
- Non-Locking
- Mixed Locking and Non-Locking

NOTE: The 16bit firmware will only support a single consecutive group of Non-Locking strips anywhere in the cabinet.

6.18.1716BIT ABSOLUTE OR RELATIVE ITEM AND USER CURFEW FEATURE

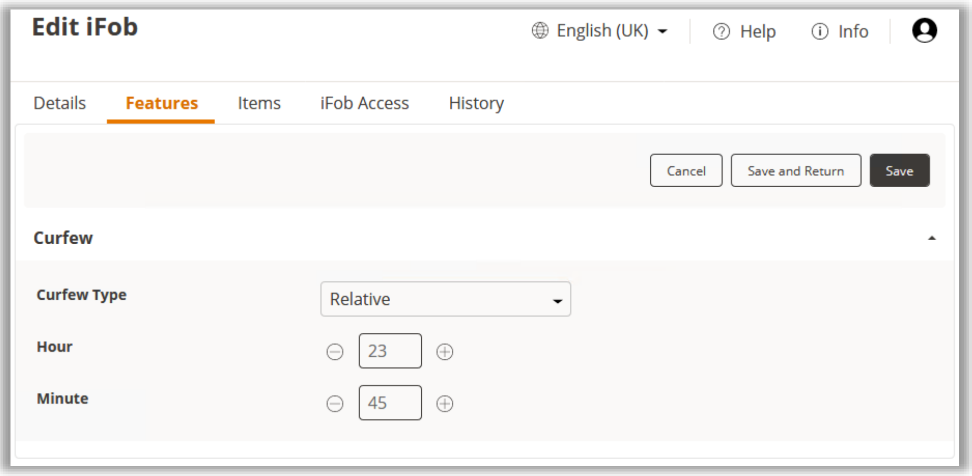
This section explains the functionality of Absolute and Relative Curfews on a 16bit System. It also explains the differences between Curfews on 16bit and Traka Touch systems.

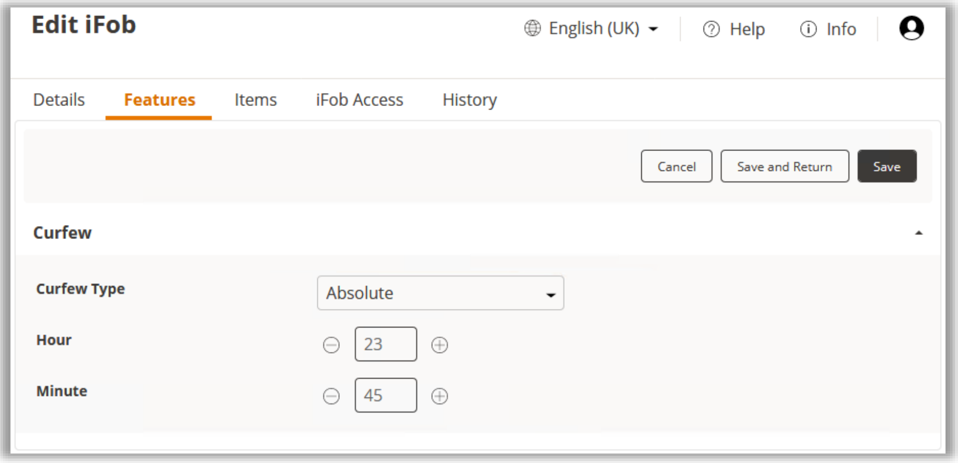
This feature will use the existing 16bit firmware iFob and User Curfew feature.

NOTE: For a complete guide to Traka Touch Curfews, refer to the Curfews section in this document.

6.18.17.1IFOB CURFEW

When editing an iFob from a 16bit system, the settings will only allow up to 24 hours for a Relative Curfew and 23 hours and 45 minutes for an Absolute Curfew, both in 15-minute increments.

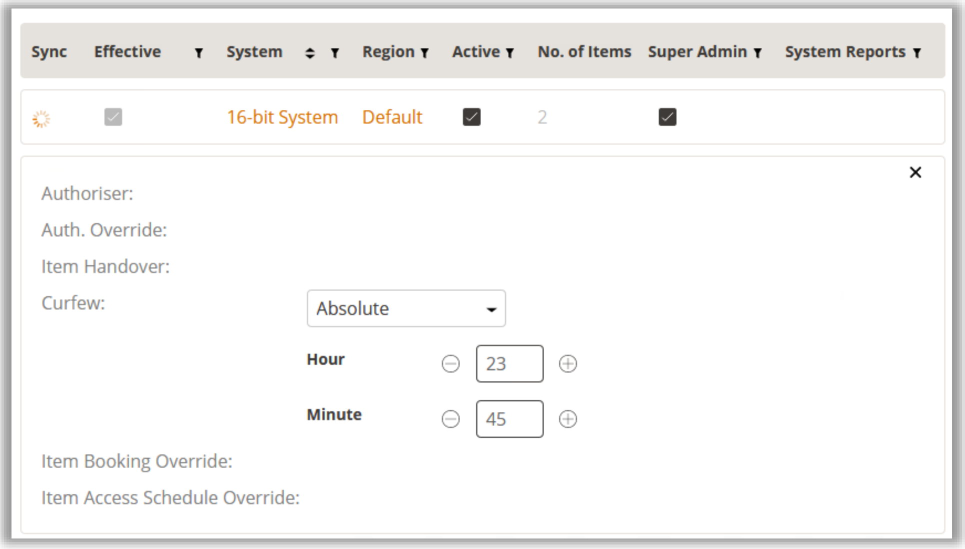




When editing an iFob from a Traka Touch system, the settings will allow up to 365 days, 23 hours and 59 minutes for a Relative Curfew and up to 23 hours and 59 minutes for an Absolute Curfew.

6.18.17.2 USER CURFEW

Like iFob Curfews, User Curfews are set on a 'per-system' basis and so for 16bit systems, the Absolute Curfew is limited to 23 hours and 45 minutes and a Relative Curfew is limited to 24 hours in 15-minute increments as shown below.



For a Traka Touch system, iFob Curfews, User Curfews are set on a 'per-system' basis. A Relative curfew can be set for 365 days, 23 hours and 59 minutes and up to 23 hours and 59 minutes for an Absolute Curfew.

NOTE: Traka Touch Curfews are not limited to 15-minute increments. If, for example an iFob with a Curfew is set for 05:20 on a Traka Touch system and is returned to a 16bit system, the time will be rounded down to 05:15.

NOTE: Relative Curfews on Traka Touch can be set for up to 365 days, 23 hours and 59 minutes. Relative Curfews on a 16bit system have 23 hours and 45 minutes. Any days will be set to zero at a 16bit system if a curfew was set on a Traka Touch system for over a day.

6.18.18 REMOTE RELEASE AN ITEM TO AN AUTHORISED OR ANONYMOUS USER

This will use the existing Remote Release function on the TrakaWEB System Viewer. For more information, refer to the Remote Release section in this document.

6.18.19 USE 'REMOTE USER LOGIN' TO LOGIN A USER TO A 16BIT SYSTEM

This will use the existing Remote User Login function on the TrakaWEB System Viewer. For more information, refer to the Remote Login section in this document.

6.18.20 READ THE LAST CREDENTIAL ID PRESENTED TO A 16BIT SYSTEM WITHIN A USER RECORD

This will use the existing Read Last ID function on the Edit User page. For more information, refer to the Edit User section in this document.

6.18.21 TRANSFER THE OWNERSHIP OF AN ITEM FROM ONE USER TO ANOTHER

This will use the existing Transfer Ownership function from the TrakaWEB System Viewer. Refer to the Transfer Ownership section in this document for more information.

6.18.22 USE 16BIT FIRMWARE-ONLY FEATURES

These Firmware-only features will affect cabinet operation but have no operational effect within TrakaWEB.

The Firmware-only Features are as follows:

- Fixed Return to a Single System (FRSS)
- Key Cabinet with Single Door
- Key Cabinet with Multiple Doors (Extension Cabinets)
- Key Cabinet Open all Doors on Login
- Key Cabinet without a Door
- Receptor Tri-Colour LEDs
- Receptor Button Release
- 16bit Keypad Release
- 16bit Description Release
- 16bit Key Cabinet Auto Release Multiple Items
- Anti Passback
- CAN Gateway
- Non-RFID Rotation Auto Allocation

6.18.23 ENABLE THE USE OF X-SYSTEM & X-IFOB AUTHORISATION ON 16BIT SYSTEMS

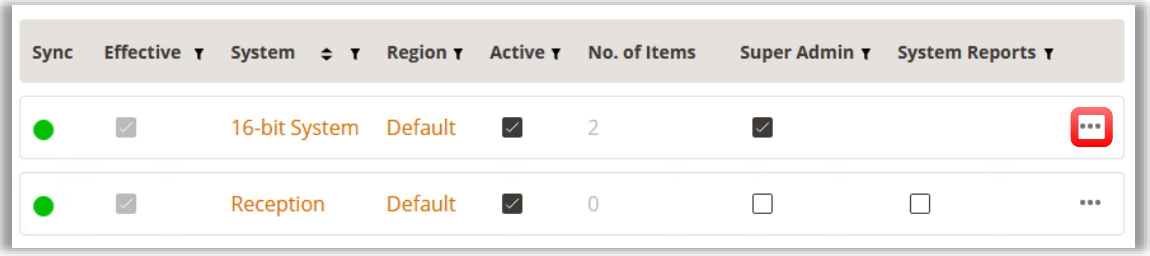
NOTE: This must first be enabled within the configuration setup before it can be used. A configuration can be created for either X-iFob or X-System Authorisers, or both.

NOTE: Traka Touch will only support iFob Authorisation and not System/User Authorisation.

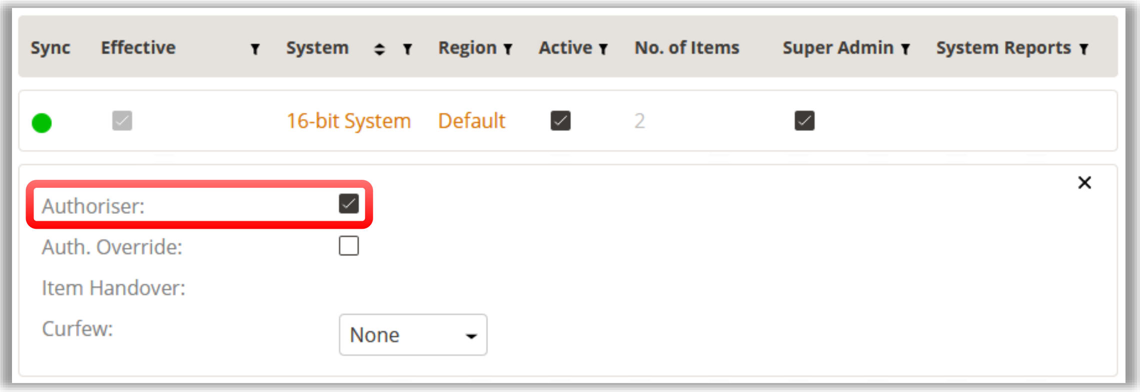
NOTE: iFobs on 16bit systems will only be able to have the 'Authorisers' set to a maximum of 2, whereas Traka Touch will allow up to 3.

The Item Authorisation enables a user to become an Authoriser to other users and allows the user to override the Item Authorisation feature. This will allow them to take items without requiring authorisation.

1. Select the user that will be set up as an Authoriser.
2. At the **System Access** page, locate the 16bit system on the system list and click on the **Ellipsis** button on the right-hand side.



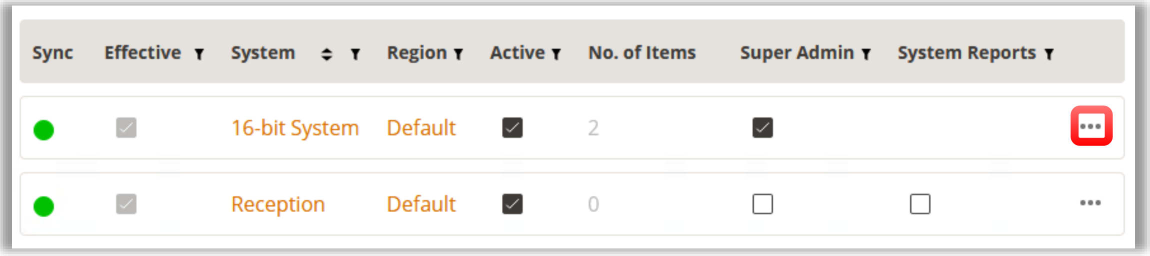
3. A new panel will open. Check the box next to Authoriser and then click the **Save** button.



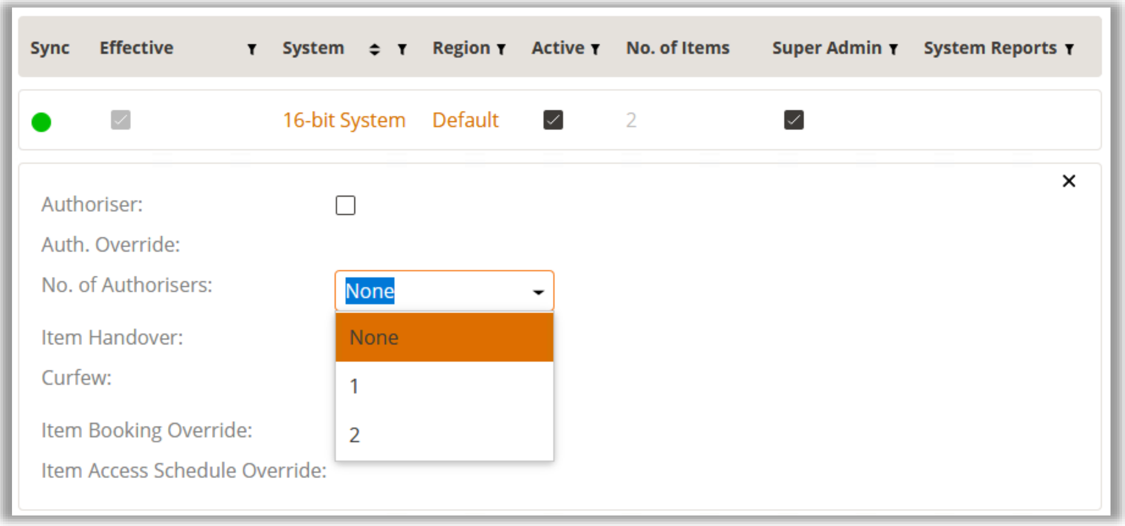
6.18.23.1 SYSTEM AUTHORISATION

1. In TrakaWEB, from the **Users** menu select the user who will be required to have authorisation to access the 16bit system and **Edit** that user.

2. In the **System Access** tab, locate the 16bit system on the system list and click on the Ellipsis button on the right-hand side.



3. A new panel will open. Select the number of Authorisers that will be required from the drop-down menu and then click the **Save** button.

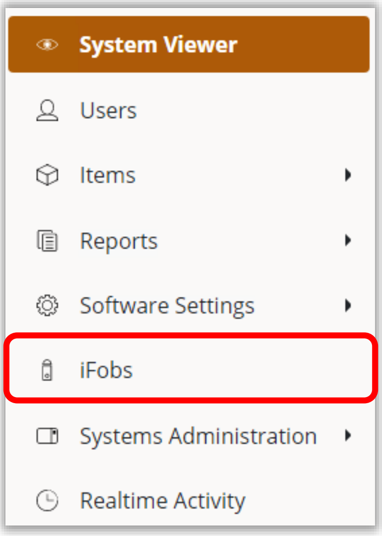


When the user attempts to access the 16bit System using keypad, scan credential or fingerprint, an authorised user will be prompted to identify themselves first, before the system can be accessed.

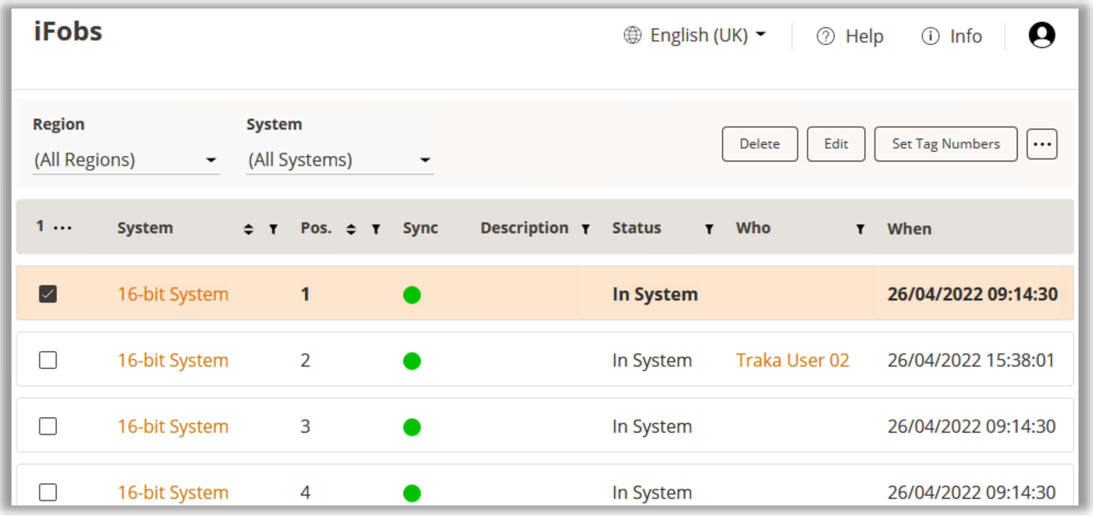
The Authoriser will then be able to scan their credential or fingerprint, or, if they press the # key, they will be able to provide their PIN to authorise the other user.

6.18.23.2IFOB AUTHORISATION

1. Select **iFobs** from the Navigation Menu.

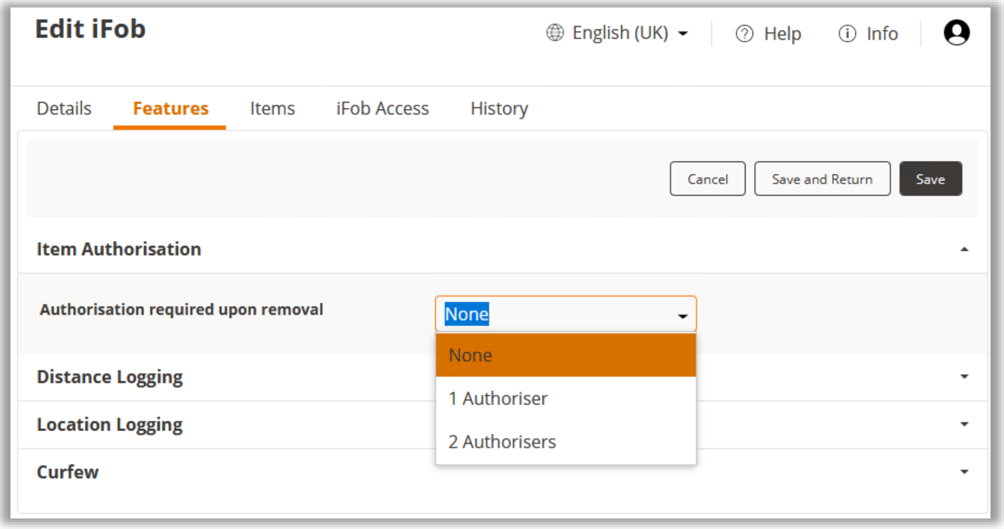


2. Double-click on the iFob that will require the Authorisation permission to be added to it.



3. At the Edit iFob page, move to the **Features** tab. There you will find the Item Authorisation option. Clicking on it will expand the panel.

4. Select the number of Authorisers required upon removal from the drop-down menu, then click the **Save** button.



When a user who requires iFob Authorisation attempts to remove the iFob from the system using keypad, scan scredential or fingerprint, an Authoriser will be prompted to identify themselves at the system first, before the iFob can be removed.

The Authoriser will then be able to scan their credential or fingerprint, or, if they press the # key, they will be able to provide their PIN to authorise the other user.

6.18.24 LOCATION LOGGING (BAY LOGGING)

NOTE: This section covers Location Logging using TrakaWEB with a 16bit System. For information regarding its functionality with Traka Touch, refer to the Fuel, Distance & Location Logging section in this document.

Location Logging or **Bay Logging** as it is also referred to, will allow users to record the current location of an asset.

Every time a user returns an iFob they will be prompted to enter a location. The user can use the keypad like a mobile phone keypad to enter letters and numbers to make up a location description.

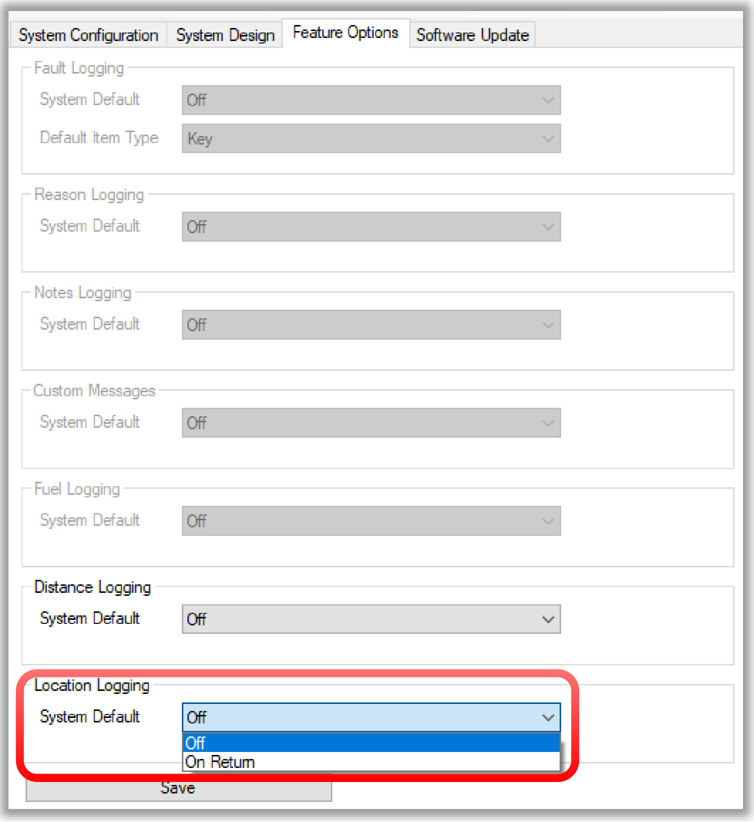
NOTE: The location description is limited to 5 characters.

The location can be looked up at any time using the Lookup Facility. For more information on this facility, refer to the **UD0089 - Traka32 User Guide**. Event reports will also be generated and can be accessed through the Reports page in TrakaWEB.

NOTE: Location Logging will only be available if the firmware of the selected system has the 'Bay Logging' configuration option enabled. If the Bay Logging option is enabled in the firmware, it is possible to enable/disable the option on any iFob in TrakaWEB and change the default option value for all iFobs in the TrakaWEB Admin Application.

6.18.24.1 ENABLING THE OPTION

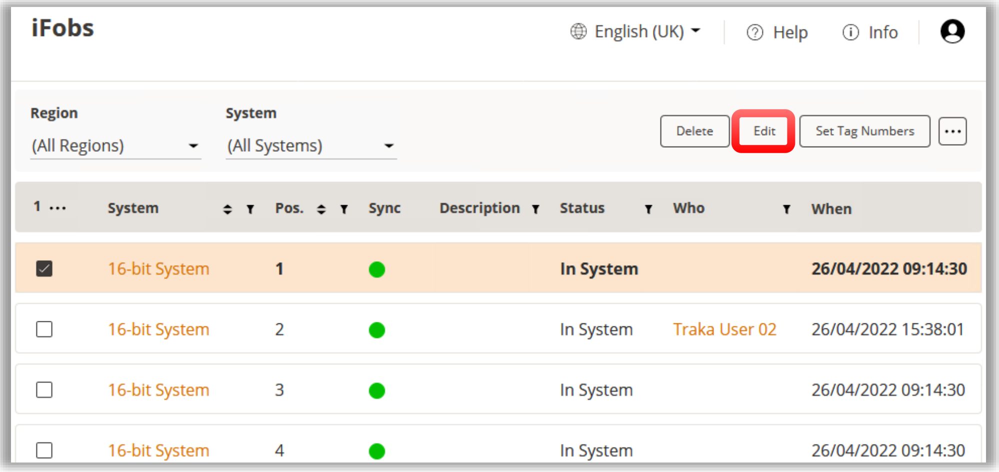
1. The Admin Application is used to set the default option to on or off for all items in that system. An administrator who has the appropriate access to the Admin Application will need to select the desired system and navigate to the **Feature Options** tab. Once selection has been completed, Click **Save**.



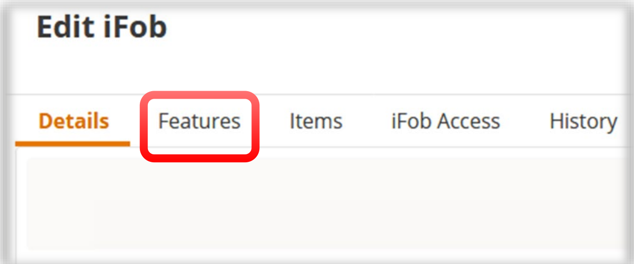
NOTE: Enabling the feature in TrakaWEB Admin will set all items in the system to have the feature active.

Alternatively, the feature can be activated within TrakaWEB for every iFob separately.

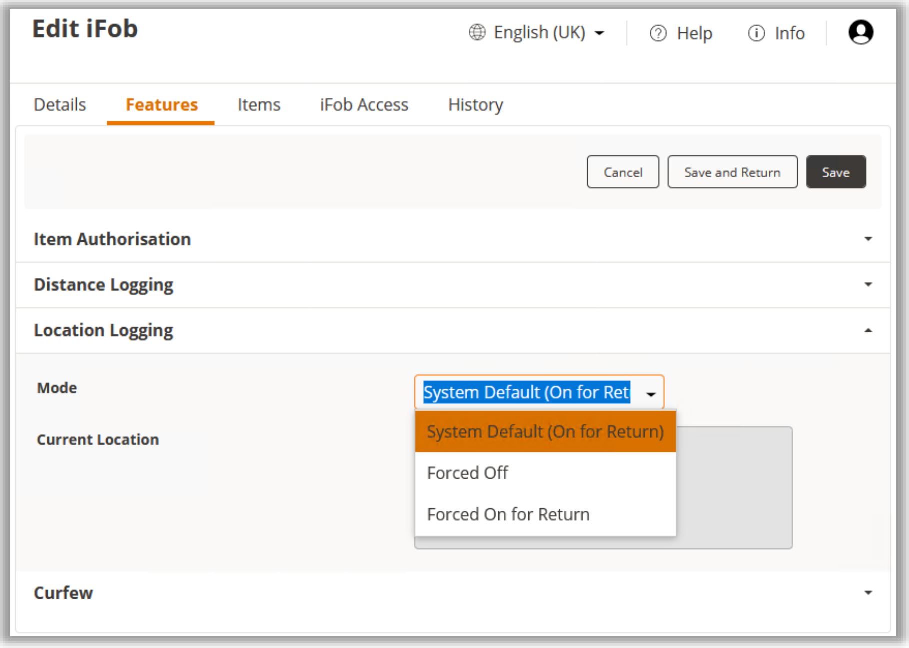
2. Navigate to the iFobs menu and select and iFob you wish to edit. Double-click on it or select it and click on the **Edit** button.



3. At the next window, select the **Features** tab.

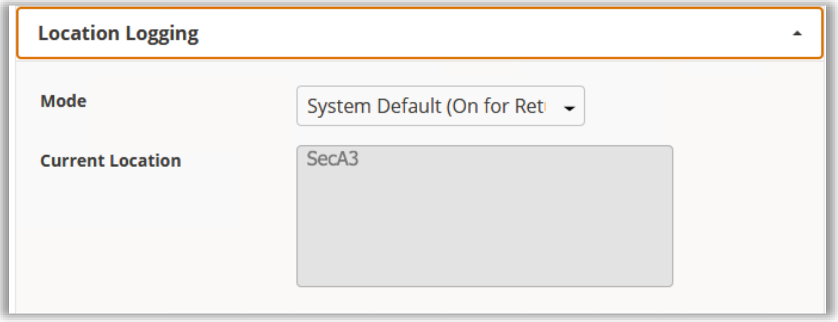


Within the **Features** tab, you will see a list of all the Feature Options that are available. Expand the Location Logging panel and choose the preferred mode for the selected iFob.



NOTE: If you choose to enable the feature through TrakaWEB, it will only be available on the current selected item. Depending on how many items you wish to have the feature enabled upon, it may be more time efficient to enable it in TrakaWEB Admin and then disable it on any items you do not want it enabled upon in TrakaWEB. If, however, you have many items and only wish the feature to be enabled on a few, it will be more time efficient to enable it on those items in TrakaWEB.

With the feature enabled, TrakaWEB will display the Current Location if one has previously been entered at the system.



6.18.24.2 REMOVING AN ITEM

When a User removes an item from the 16bit system, the screen will display the last location of the vehicle for that particular slot.

6.18.24.3 RETURNING AN ITEM

When a User returns an item to the 16bit system, they will be required to enter details of the vehicles current location followed by pressing the **#** key.

As well as using the Lookup facility through the 16bit system, the location information can be viewed through TrakaWEB in a number of ways.

- The System Viewer
- The Current Location on the Features page
- Viewing the Current Location Report

NOTE: An Exception report will be generated if a user does not enter a location. This will also be reflected in the Item Activity tab on the System Viewer page.

NOTE: For more information on Location Reports, refer to the Location Reports section within the Fuel, Distance & Location section of this document.

6.18.25 NON-RFID AUTO ALLOCATION SUPPORT

16bit systems include a feature for lockers which will auto-allocate locker compartments. This feature is now supported by TrakaWEB. This is similar to a Personnel Locker whereby a non-RFID equipped locker system can be used to store a user's items over a period of time as required.

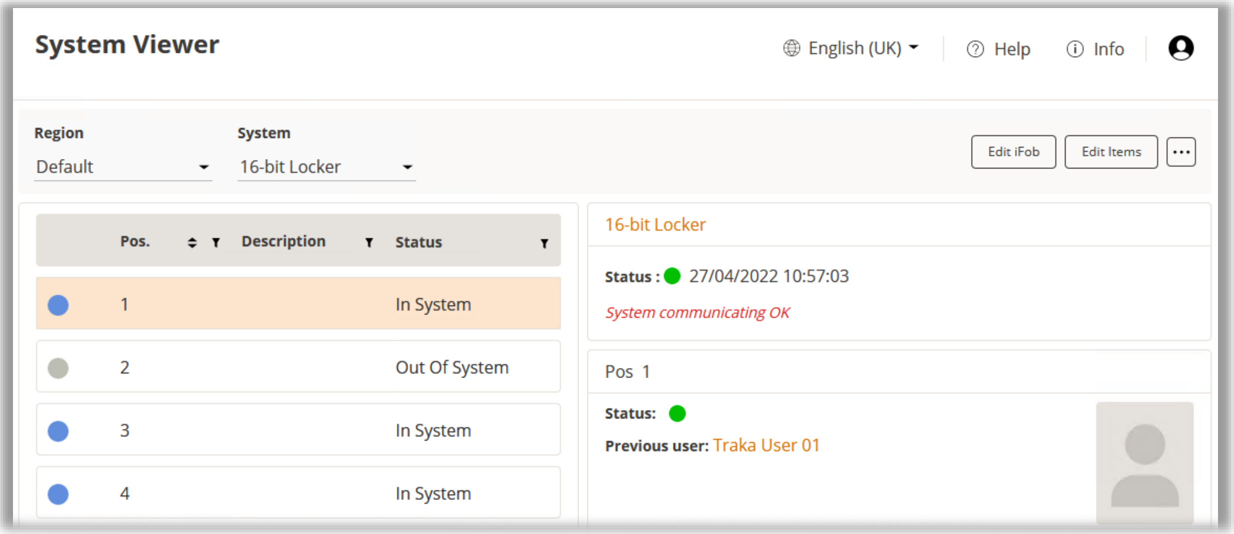
When a user accesses the system, a vacant compartment is made available to the user. Should they choose to, they can select another vacant compartment.

Two different statuses are created for each position in the locker depending on whether that particular compartment is occupied or unoccupied.

For a deallocated compartment, the icon within TrakaWEB will be displayed by a grey icon.

For an allocated compartment, the icon within TrakaWEB will be displayed by a blue icon.

A typical example of the TrakaWEB System Viewer with allocated and deallocated locker compartments is shown below.



Two new events are generated in the event of an allocation/deallocation:

Locker Allocated Event

The Locker compartment now contains a user's items. This event is generated by receiving a 'Locker Occupied' event from the 16bit system.

Locker Deallocated Event

The Locker compartment is now vacant and once again available. This event is generated by receiving a 'Locker Unoccupied' event from the 16bit system.

6.18.26 16BIT FIRST IN/FIRST OUT (FIFO) ON TRAKAWEB - OVERVIEW

Although Traka 16bit systems were designed to run using Traka32 software, TrakaWEB does offer limited support for them. On a 16bit locker, the asset manager works like a combination of FIFO & AFIFO. It will allow a user to hold multiple items at once, however they will only be able to take or return the items one at a time. The CIAG allowance feature is not supported by TrakaWEB when using a 16bit system. 16bit systems will need to have a firmware version of 4.0.12 or above for compatibility.

For more in-depth information on 16bit FIFO on TrakaWEB, please refer to **UD0232 – TrakaWEB FIFO and Advanced FIFO User Guide.**

7. TRAKAWEB ADMIN JOB SCHEDULER

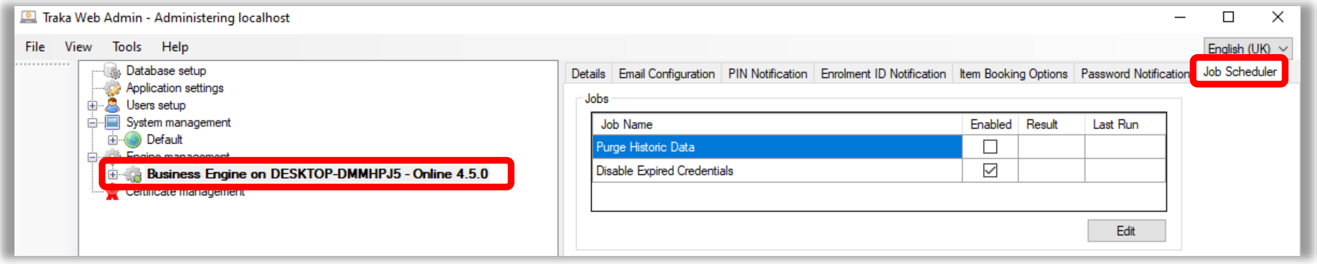
NOTE: As of TrakaWEB version 3.3.0, the TrakaWEB Admin Job Scheduler replaces the requirement for the TrakaWEB Database Purge Batch File – TD0103. Users of previous versions of TrakaWEB should still refer to this.

Within the TrakaWEB Admin App, it is possible to configure a Job Scheduler. This will make it possible to clear data from the system at specific times, which can be enabled by the System Administrator.

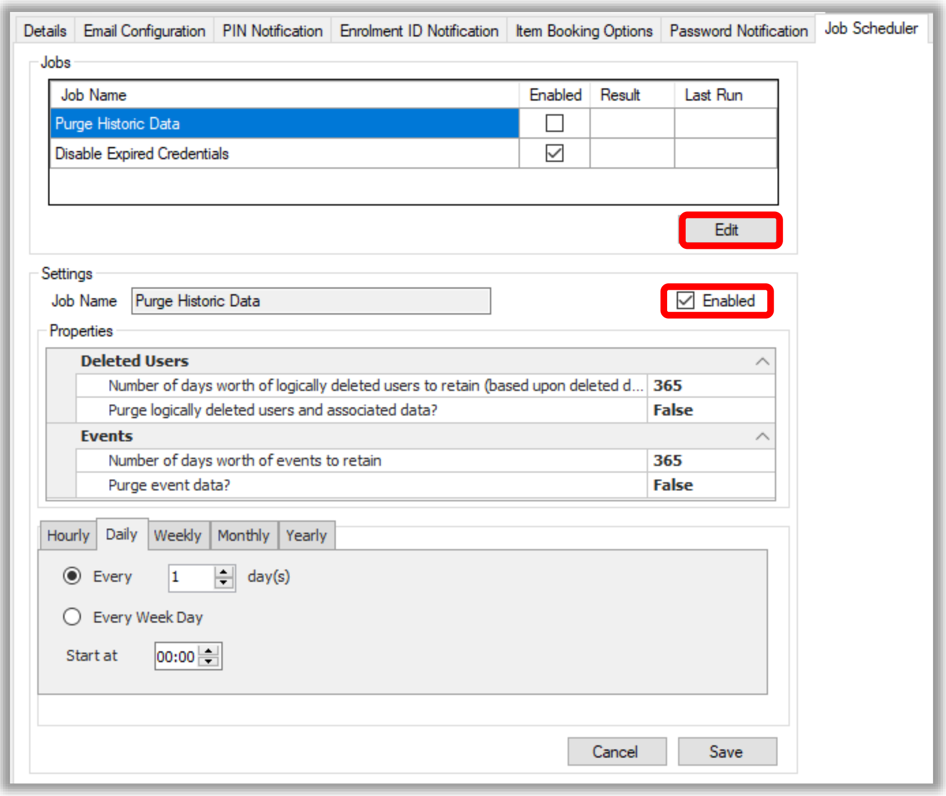
The tab for the job scheduler is located by selecting the Business Engine. By default, each job schedule will be disabled.

7.1 PURGE HISTORIC DATA

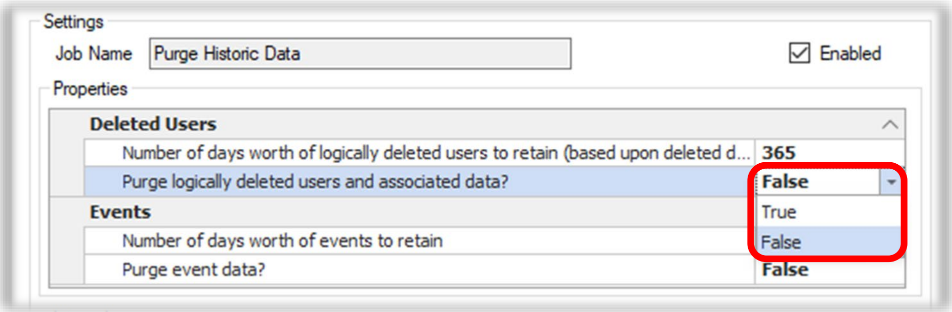
1. Select the **Business Engine** followed by the **Job Scheduler** tab. Click on **Purge Historic Data**.



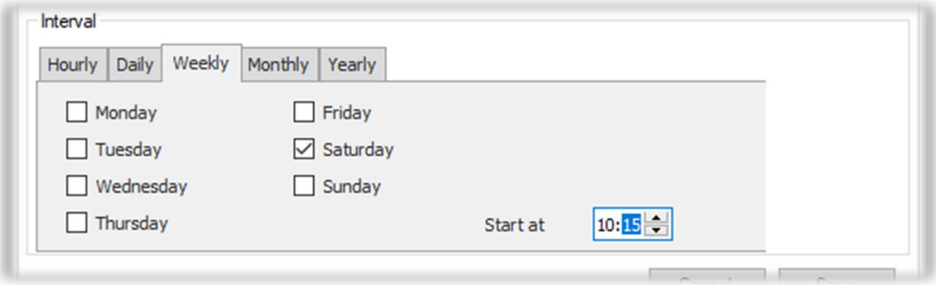
2. Clicking on the **Edit** button will allow you to change the parameters for the selected Jobs. Placing a tick in the **Enabled** checkbox will enable the jobs in the list.



3. Within the Properties box, change the setting to **True** to enable the parameter.



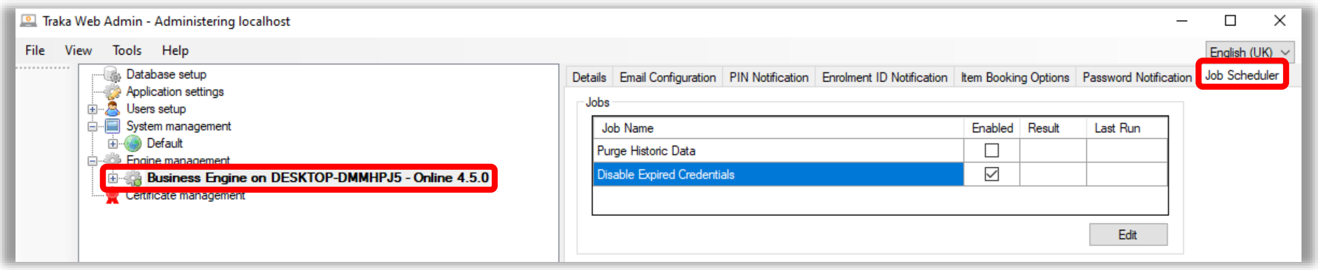
4. The lower box will allow you to change the interval for when you wish the Schedule to be run.



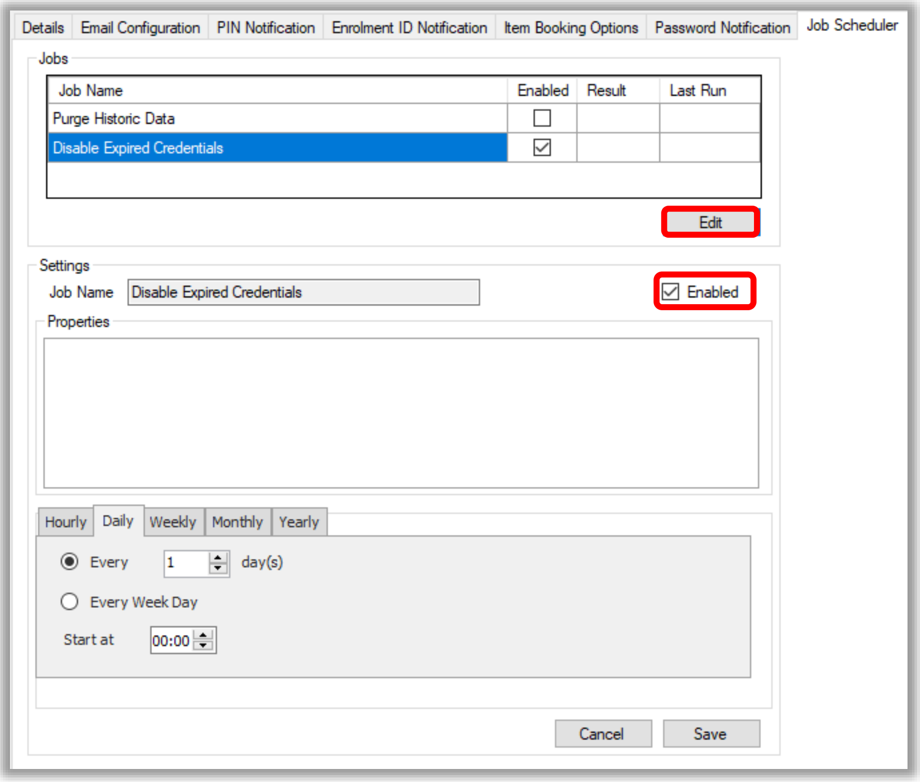
5. Once complete, click the **Save** button.

7.2 DISABLE EXPIRED CREDENTIALS

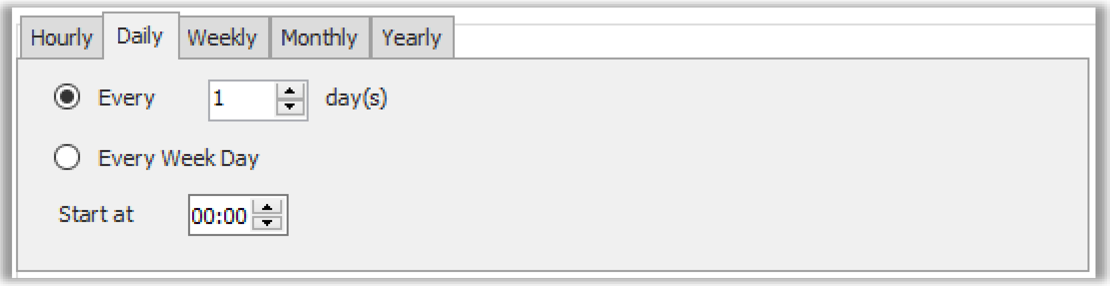
1. Select the **Business Engine** followed by the **Job Scheduler** tab. Click on **Disable Expired Credentials**.



2. Clicking on the **Edit** button will allow you to change the parameters for the selected Jobs. Placing a tick in the **Enabled** checkbox will enable the jobs in the list.



3. The Settings box will allow you to change the interval for when you wish the Schedule to be run.



NOTE: By default, the Schedule will be set to run at midnight every day.

4. Once complete, click the **Save** button.

8. TWDI – TRAKAWEB DATA IMPORT

The TWDI process describes the procedure for migrating database information such as Items, Item Access Groups, and Users from an existing Traka32 system or a manually created database into TrakaWEB as required.

The database is exported from Traka32 into an Excel spreadsheet which can then be imported to TrakaWEB via the Admin App. Unfortunately, it is not possible to migrate all of the database information such as Access Schedules and RRMS.

It is recommended that the Traka32 database is backed up before proceeding to export the database and the 16bit system is only disconnected after the export process is completed.

For more information on TWDI, please refer to **TD0155 – TrakaWEB Data Import & Traka32 Data Export Procedure**.

For assistance with the Traka32 Data Export/TrakaWEB Data Import procedure, please refer to **TV0052 – Traka32 Data Export_TrakaWEB Data Import Online Help Tool.**

9. DISABLE & CLEAR AUTOFILL INFORMATION

9.1 OVERVIEW

If the autofill options have not been disabled in your web browser, the Username and Password information will be displayed when you next access the login screen. This section will show you how to disable the autofill options in some of the more popular web browsers to prevent this information from being unintentionally saved or used in your browser.

The web browsers covered in this section include:

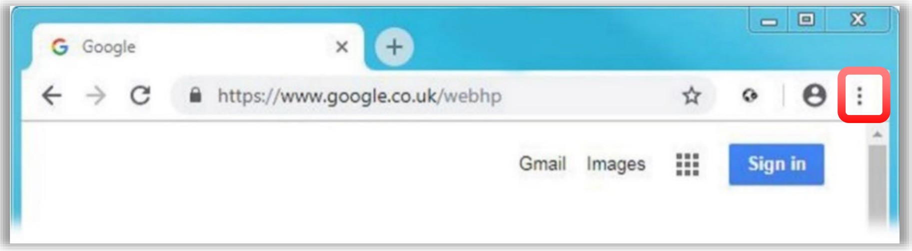
- Google Chrome
- Firefox
- Microsoft Edge
- Safari

9.2 GOOGLE CHROME

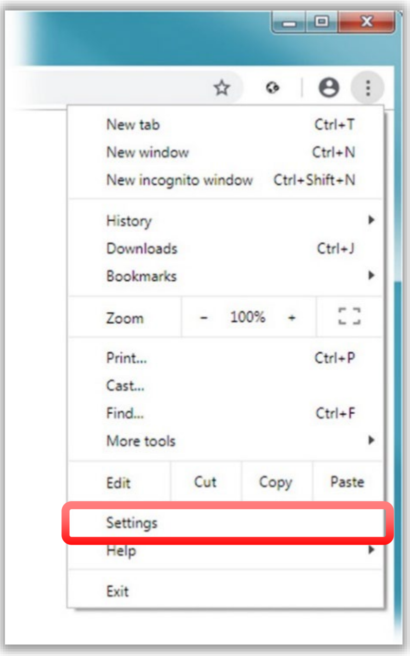
When using Google Chrome, it is recommended that you disable autofill data and also clear the browsing data.

9.2.1 DISABLING AUTOFILL

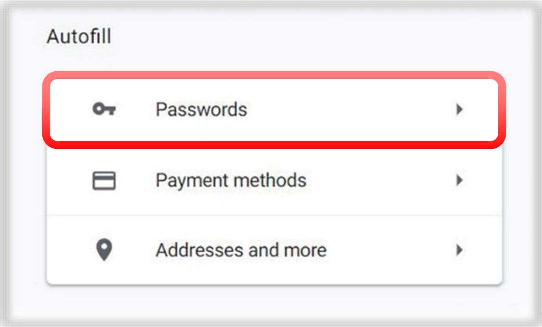
1. Click on the Chrome menu icon.



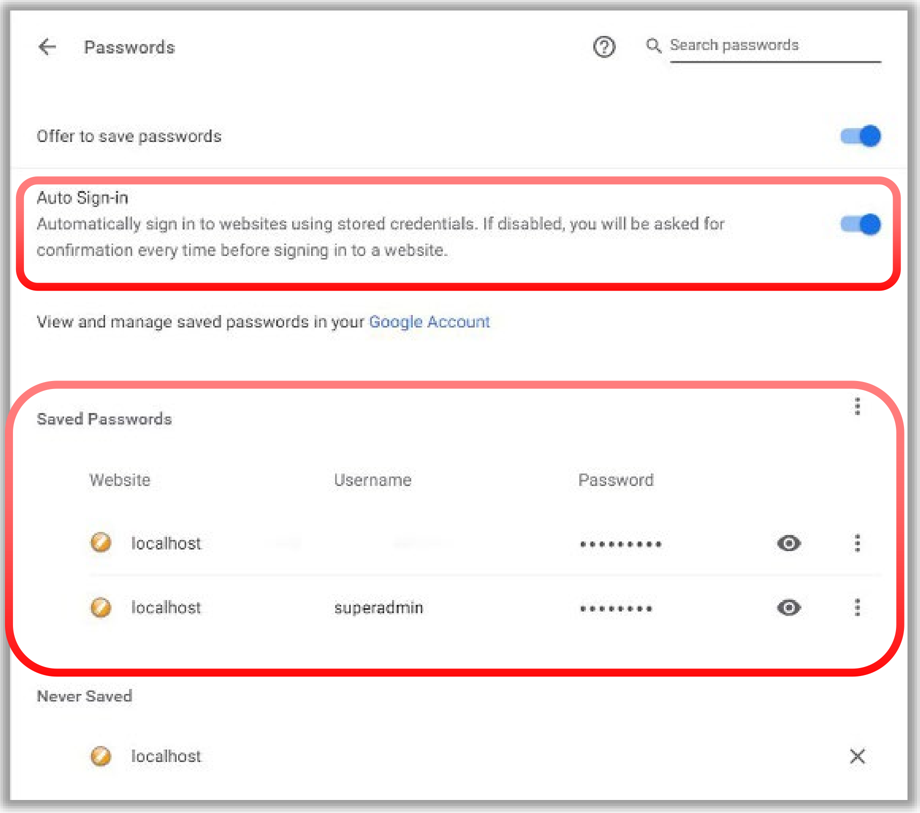
2. From the menu, select **Settings**.



3. At the next screen locate the **Autofill** section and select the **Passwords** option.

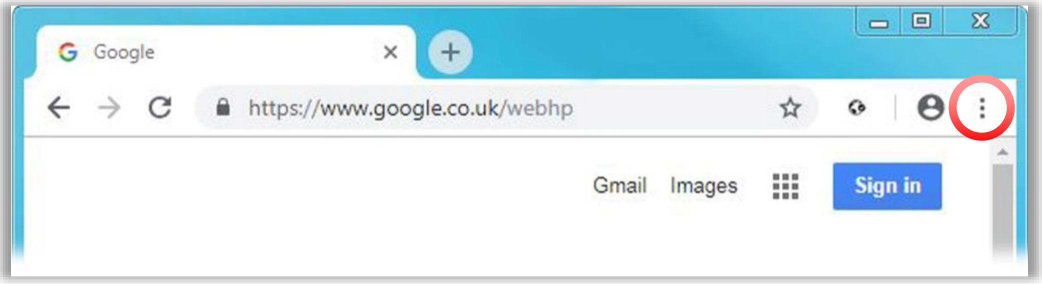


4. The next window will allow you to disable the **Auto Sign-in** option and also enable you to remove any existing saved passwords.

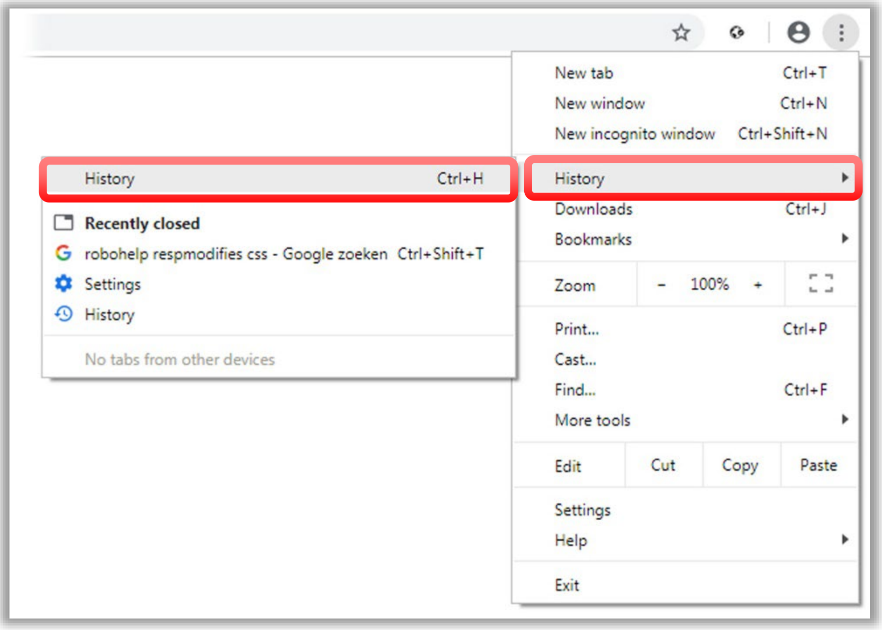


9.2.2 CLEARING AUTOFILL DATA

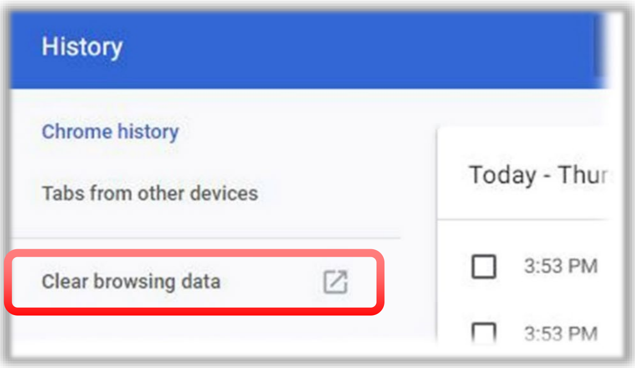
1. Click on the Chrome menu icon.



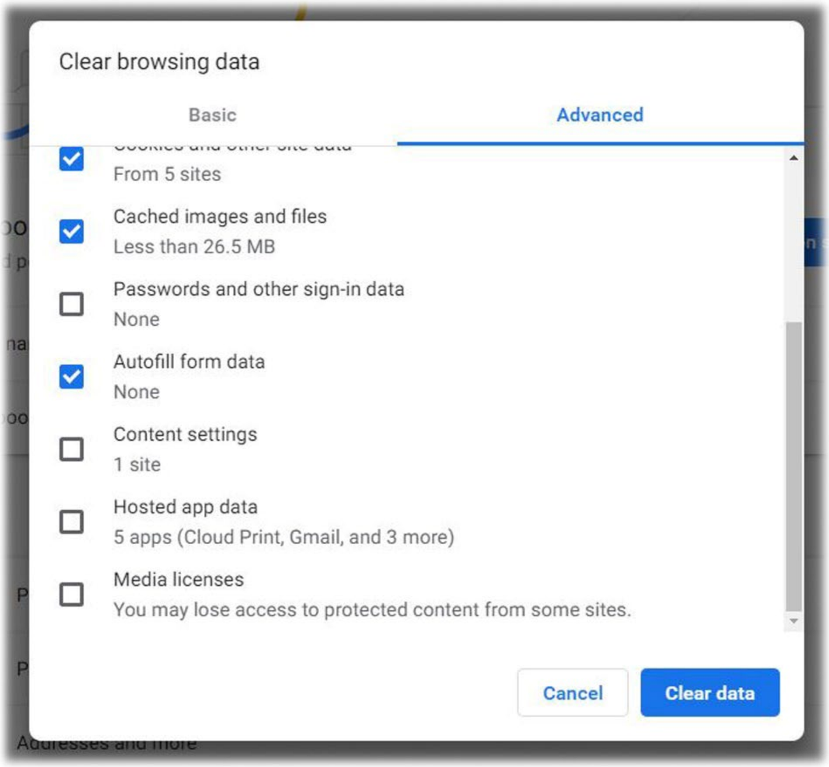
2. From the menu select the **History** option to expand the properties window and then select **History** from the list.



3. At the next window select the **Clear Browsing Data** option.



4. A new window will now appear. Select the **Advanced** tab, ensuring that the option for **Autofill Form Data** checkbox is selected and then click on **Clear Data.** The browsing data will now be cleared.



Alternatively, you can press CTRL+SHIFT+DEL on your keyboard and bypass steps 1-4.

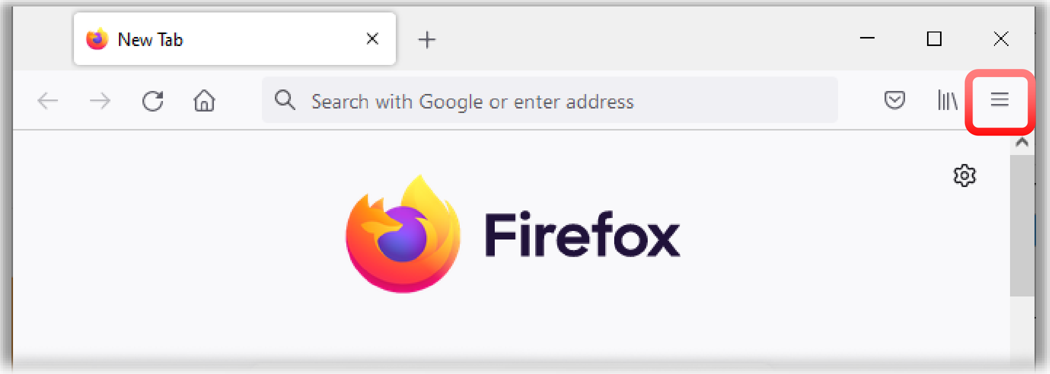
NOTE: Depending on how often your browsing history is cleared, this process may take some time.

9.3 FIREFOX

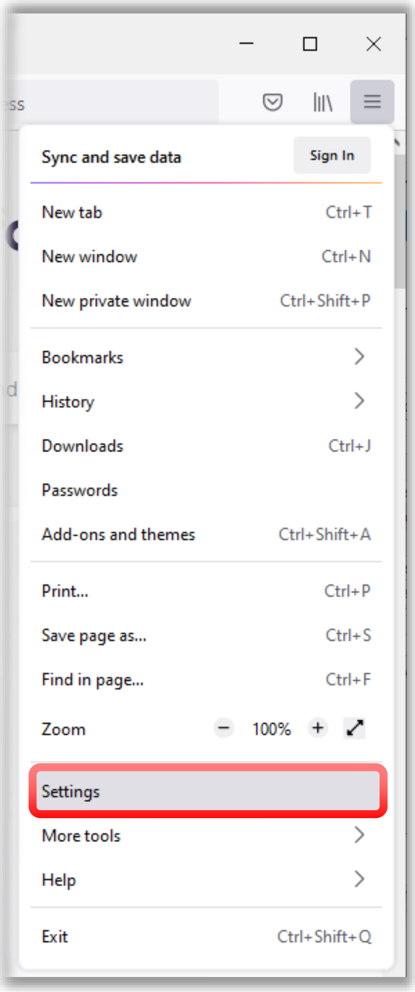
When using Firefox, it is recommended that you disable autofill data and clear the browsing data.

9.3.1 DISABLING AUTOFILL DATA

2. Click on the Firefox **Application Menu** icon.

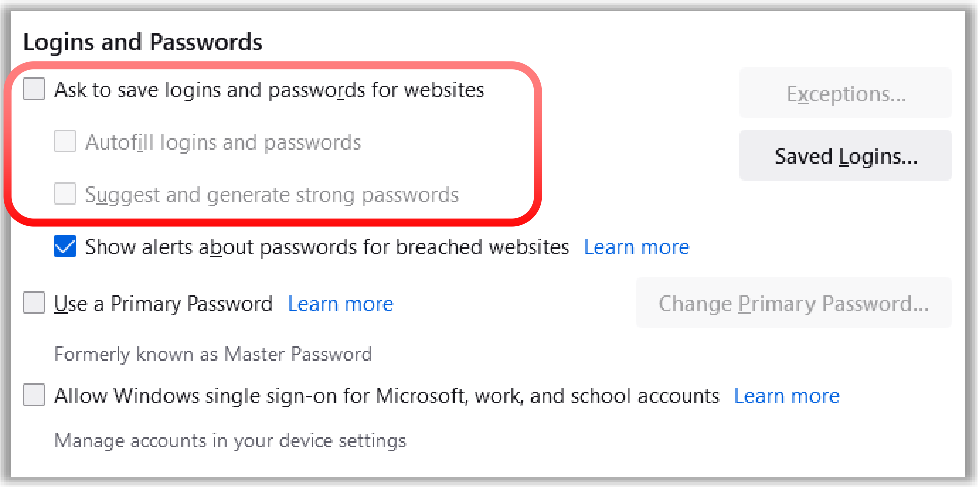


2. From the menu, select **Settings.**



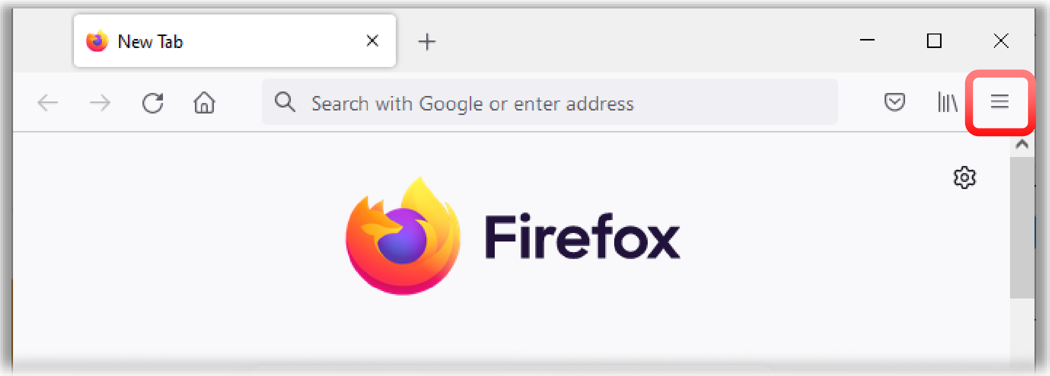
3. At the next screen, select **Privacy & Security**.

4. Scroll down to the **Logins & Passwords** section and uncheck the **Ask to save logins and passwords for web sites, Autofill logins and passwords**, and **Suggest and generate strong passwords** check box.

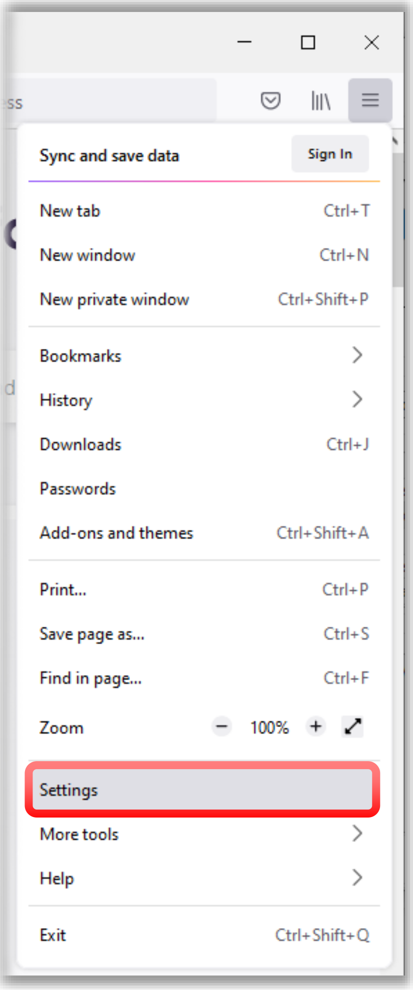


9.3.2 CLEARING AUTOFILL DATA

1. Click on the Firefox **Application Menu** icon.

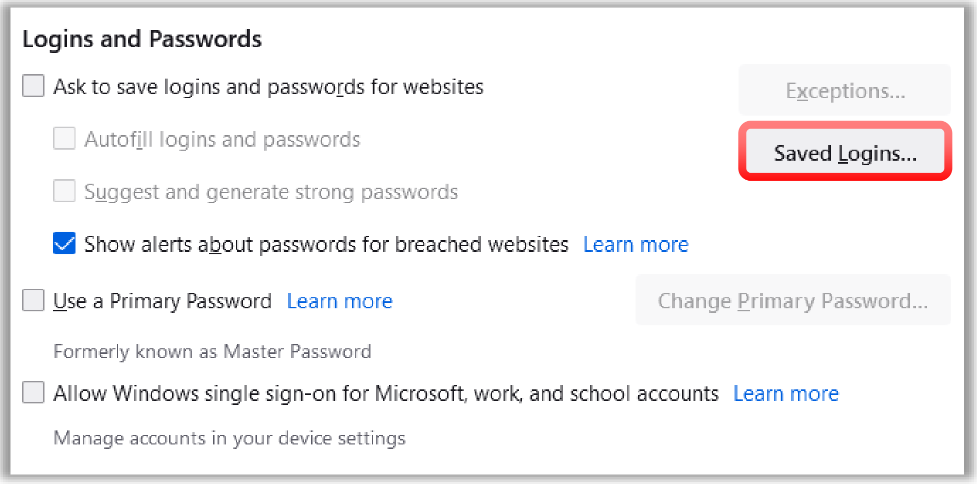


2. From the menu, select **Settings.**

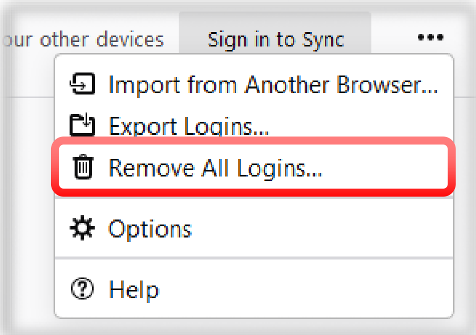


3. At the next screen, select **Privacy & Security.**

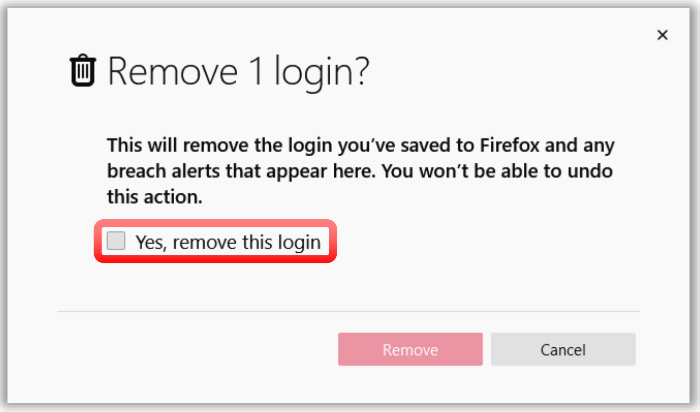
4. Scroll down to the **Logins & Passwords** section and click on the **Saved Logins** button.



5. A new window will open displaying all the saved passwords. Select the Ellipsis menu in the upper right corner of that window and a drop-down menu will open. Click on the **Remove All Logins** button.



6. A message will appear asking you to confirm the removal process. You will need to check the box in the middle and click on **Remove** to continue.



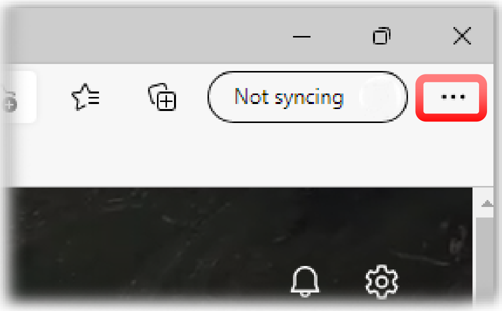
All passwords will then be removed from your browser and you may then close the window.

9.4 MICROSOFT EDGE

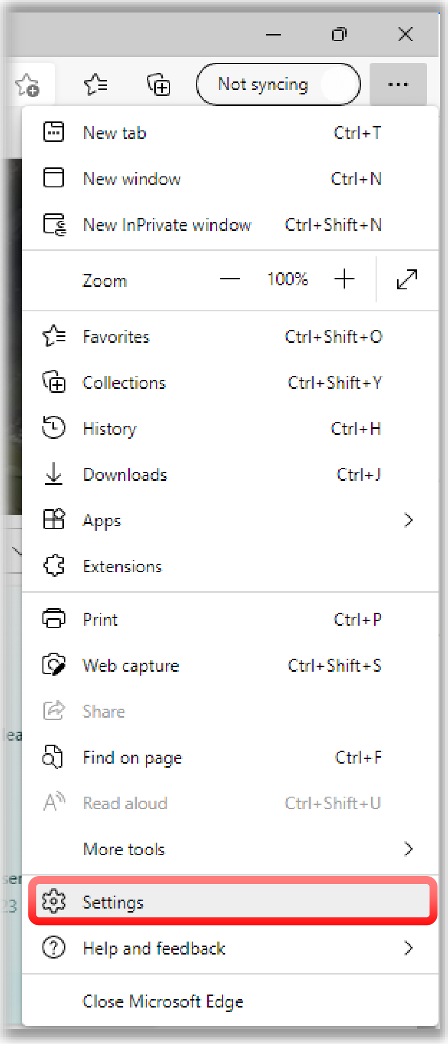
When using Microsoft Edge, it is recommended that you disable autofill password option and clear the saved passwords.

9.4.1 DISABLING AUTOFILL DATA

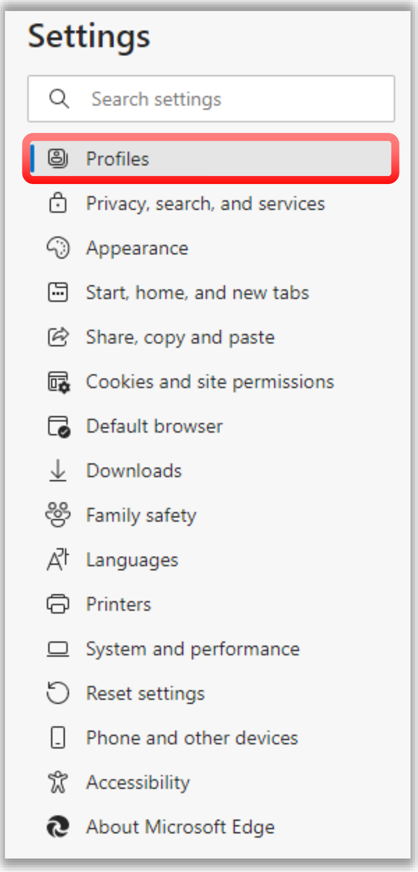
1. In the Microsoft Edge browser, click on the **Settings and more** menu icon.



2. From the drop-down menu, select **Settings.**

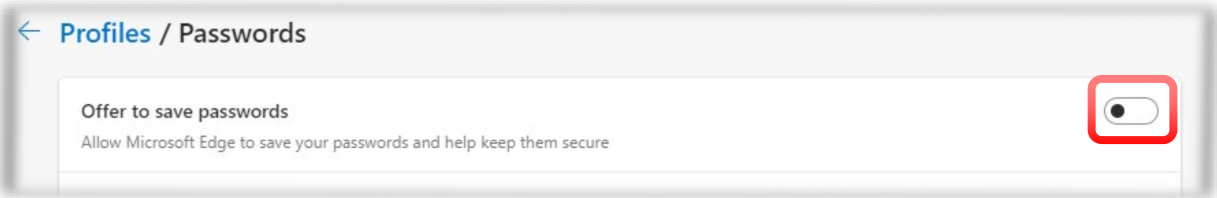


3. A new window will now appear, select the **Profiles** tab from the top row.



4. Click on **Passwords**.

5. Turn off the option to Offer to Save Passwords.

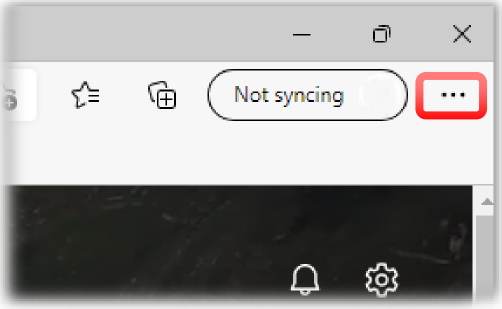


6. Once you have made the change, close the Settings tab.

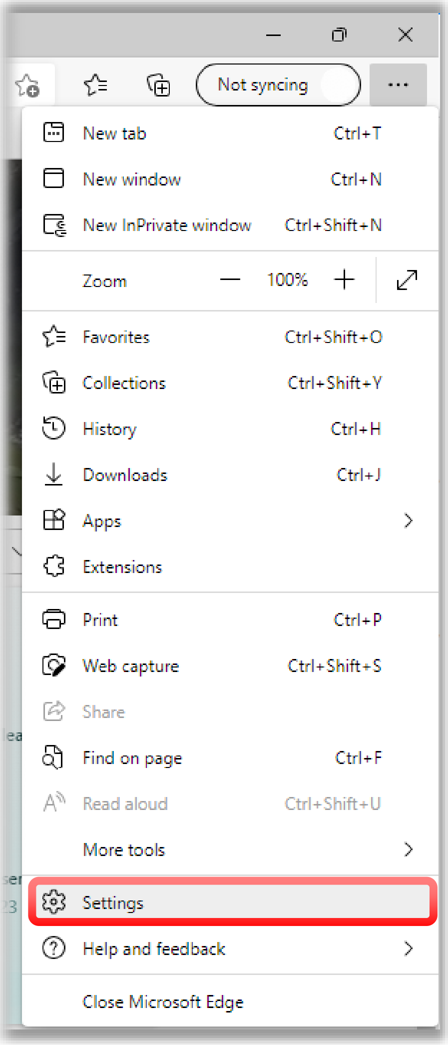
9.4.2 CLEARING AUTOFILL DATA

If the password to the TrakaWEB domain has already been saved in Microsoft Edge, you will be able to delete it.

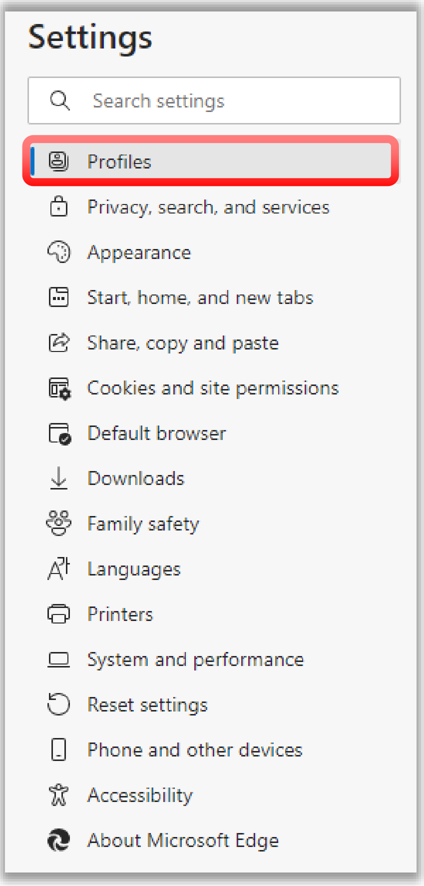
1. In the Microsoft Edge browser, click on the **Settings and more** menu icon.



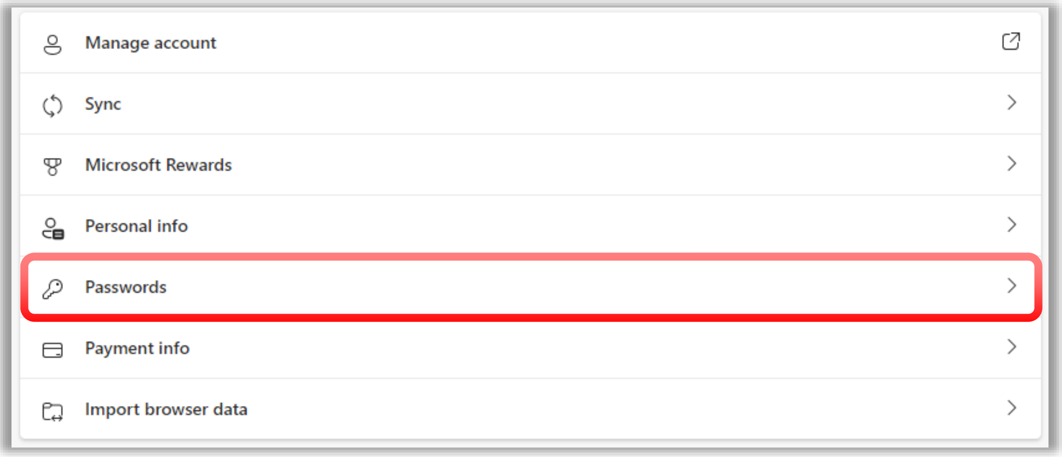
2. From the drop-down menu, select **Settings.**



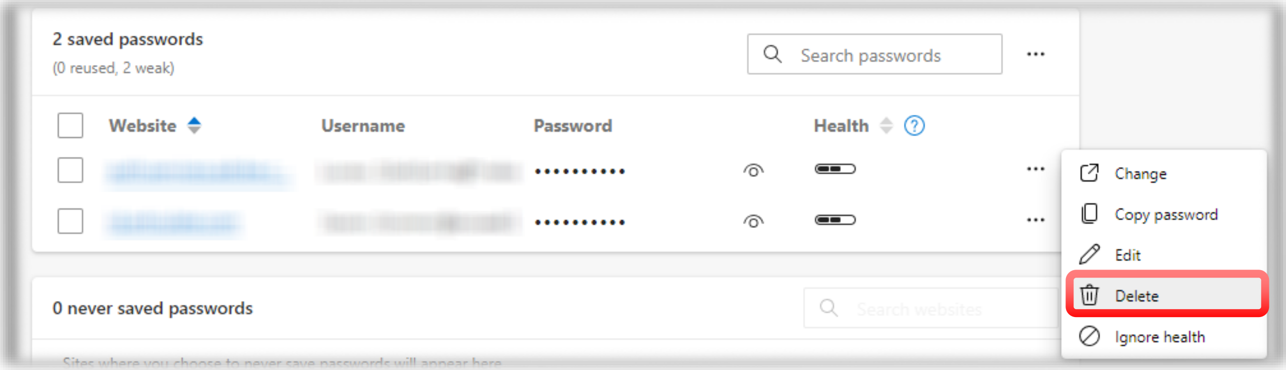
3. A new window will now appear, select the **Profiles** tab from the top row.



4. Click on **Passwords**.



5. Scroll down to display a list of saved passwords. Select each one that you need to erase from Microsoft Edge and click on the Ellipsis button to the right of the password. A drop-down menu will appear. Click on **Delete**.



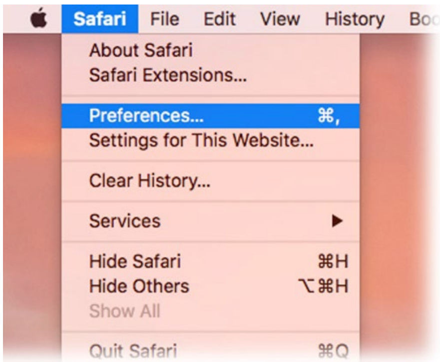
6. Close the **Settings** window.

9.5 SAFARI

When using Safari, it is recommended that you disable autofill data and clear the browsing data.

9.5.1 DISABLING AUTOFILL DATA

1. With the Safari browser open, select **Safari** from the top of the screen and select **Preferences.**

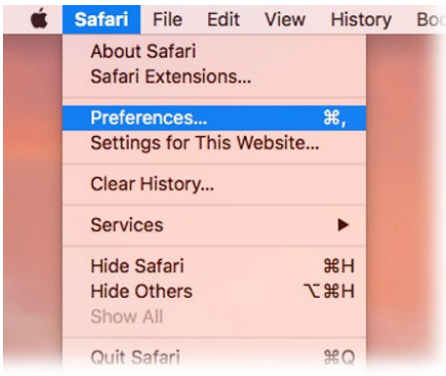


2. A new window will open. Select the **Autofill** tab and if checked, select the **Using information from my contacts** and **Other Forms** check boxes to deselect them.

3. Once completed, close the window.

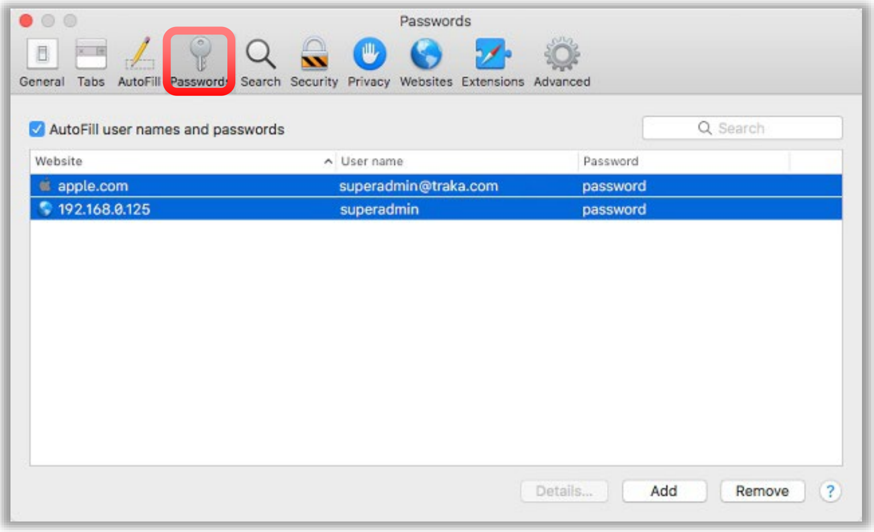
9.5.2 CLEARING AUTOFILL DATA

1. With the Safari browser open, select **Safari** from the top of the screen and then select **Preferences.**



2. A new window will open. Select the **Autofill** tab and if checked, select the **Using information from my contacts** and **Other Forms** check boxes to deselect them.

3. Within the **Passwords** window, select any specific passwords that require clearing and then click on the **Remove** button. Once complete, close the window.



For more information about managing usernames and passwords with Safari, refer to the Apple website:

https://support.apple.com/guide/safari/use-autofill-ibrw1103/mac

10. SUPPORT LOG FILES

Should you be required to access or provide your Support Log Files, they are stored as text documents and can be located here:

Traka Business Engine Support Logs:

C:\Program Files\Traka\Traka Business Engine Service\Support\Logs

Traka Communication Engine Support Logs:

C:\Program Files\Traka\Traka Comms Engine Service\Support\Logs

TrakaWEB Admin Support Logs:

C:\Program Files\Traka\Traka Web Admin\Support\Logs

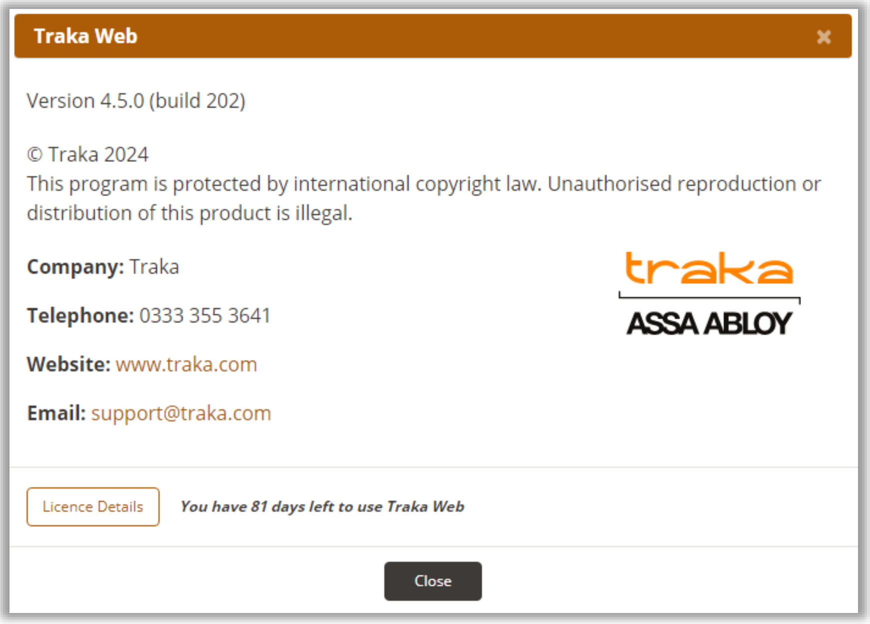
IIS (Web Front End) Support Logs:

C:\inetpub\wwwroot\TrakaWeb\App_Data\Support\Logs

11. TECHNICAL SUPPORT

If you need to contact Traka/distributor for technical support, navigate to the **Info** section found at the top of the page.

A new window will show for the following details:



Technical Support Information

[Please refer to the 'Traka Contact Details' page at the beginning of this guide.]

12. END USER LICENCE AGREEMENT – SOFTWARE

Please refer to the policies section of the Traka web site for the most up-to-date information concerning Traka's software EULA:

https://www.traka.com/global/en/about/policies