

TRAKAWEB USER GUIDE

UD0018

29/11/22

VERSION 10.9

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VERSION HISTORY

Version	Date	Who	Description of Changes	Approved By
1.0	16/11/12	AK	Initial version of document	hpproved by
2.0	18/05/12	AK	General Updates	
3.0	29/05/13	AK	Rewrote the document to new style of TrakaWEB	
4.0	14/03/14	AK	Added detail on the Curfew section	
5.0	07/11/14	AK	Updated document to reflect current changed to TrakaWEB latest features	
5.1	28/04/15	AK	Amended the supported browsers in section 1.2. Added section on Email notifications.	
5.2	12/05/15	AK	Fixed the footer at the bottom of the document.	
5.3	31/07/15	LN	Added RRSS section	
5.4	18/08/15	GU+OR	Added email notification filter description + minor changes	
5.5	17/09/15	LN	Updated to incorporate the use of Lockers. Rewritten Curfews section. Rewritten Setting Up Email Notifications section. Added USB Charge Status Indication section. Adding more detail to Notes & Reason Logging and Custom Messages. General wording updates.	
5.6	20/10/15	LN	Removed details on obsolete feature – Hide Red LEDs	
5.7	02/12/15	JO	Updated TrakaWEB prerequisites (1.0).	
5.8	21/01/16	RC+LN	Updated Email Notifications in section 3.10.7. Edited 'Enrolment ID' in User Details section to include Card Reader.	
5.9	04/03/16	RC	Included section for Fault Logging (3.10.4)	
6.0	06/04/16	RC	Amendment to Curfew functionality change. (3.10.7)	
6.1	21/04/16	DJW	Updated prerequisites section (1.1).	
6.2	06/05/16	RC	Moved Feature Options to end of document. Created section for Item Booking (section 5.7).	
6.3	03/06/16	RC	Made changes to section 3.4.3, Editing an Item.	
6.4	20/06/16	RC	Added Fuel, Distance & Location Logging feature to section 5.8. Updated screen shot references to the new feature options page throughout the document.	
6.5	11/07/16	RC	Changed 'Current' to 'Curfew' in section 3.5.3 – Status Reports	
6.6	05/08/16	RC	Added TrakaWEB System Viewer Grid to section 3.2	
6.7	26/10/16	LN	Moved 'Item Access Groups' to 'Items' section. Corrected issue with heading levels from 'Feature Options' section onwards.	
6.8	21/11/16	RC	Added Access Schedules – section 3.13	
6.9	21/12/16	RC	Updated item booking. Items removed from system prior to a booking commencing – Section 5.7.8	
7.0	13/01/17	RC	Added information on Grant All/Revoke All in section 2.5.2	
7.1	02/02/17	RC	Added subsection on using the time picker in access schedules- Section 3.16.3. Added details to Fault Logging regarding prompt for info prior to the locker door opening – Section 4.1.6 & 4.1.13. Added new introduction.	
7.2	09/02/17	RC	Change to email notification section. Use a comma to separate email addresses instead of semi-colon. Section 4.5.3.7. Access Schedules icon added to Navigation Toolbar – Section 2.5.3.1	
7.3	07/04/17	RC	Added new section for 16bit support for TrakaWEB – Section 6	
7.4	20/04/17	RC	Updated Filter Builder in section 3.1.1.1 by removing 'When' activity.	
7.5	19/09/17	RC	Updated Authorisers and Curfews in 16bit support section. Added sync information to Access Schedules (Reviewed by OR) – Section 3.13. Added new logon image to Getting Started section. Added note in Email Notification regarding Subject field. Item handover section moved to Feature Options. Removed reference to Korean in the language section. New screen grabs added to email notifications for Fault Logging. Additional note in Fault Logging for email notifications. Added note for adding 5 items	

			to an iFob in section 3.4.5. Changes and additional notes made to	
	0.6 /4 0 /4 7		16bit Support – Section 6.	
7.6	06/12/17	RC	Sub-configuration options added to Item Booking, sections 5.7.7, 5.7.8, 5.7.9. Change made to Software Permissions Groups in section 3.6.4	
7.7	24/01/18	RC	Added information for TrakaWEB Admin Job Scheduler to Section 7	
7.8	27/03/18	JO	Updated section 2.2 – TrakaWEB Pre-requisites	
7.9	11/04/18	RC	Updated Job Scheduler images in section 7	
8.0	24/05/18	WT	GDPR Added after contents pages	
8.1	28/06/18	RC	RRMS added to section 5.10. RTUS information added to section 5.11 for V3 release.	
8.2	03/07/18	RC	Change to note in RRMS section 5.10	
8.3	16/07/18	RC	Added information for Authorisation Override to section 4.3.2	
8.4	13/11/18	RC	Updated Software Permissions Groups in section 4.6.4. Updated screen shots throughout document to reflect latest Traka Touch screens. Updated language selection in section 3.1	
8.5	16/01/18	RC	Updated section for updating items in section 4.4.2	
8.6	25/03/19	RC	Added information for clearing auto-fill info from browser to section 3.2 & 8. Changes to section 6.11 with updates of how 16bit Card &/or PIN option works with TrakaWEB. Added information for Emergency Open to section 4.11 FIFO information added to section 6. Edit to 16bit FIFO in section 7.23. Support telephone number updated at start and end of document. Illegal Handover now changed to 'Item Returned by a Different User' in reports – Section 4.5. Job Scheduler updated – Section 8	
8.7	02/04/19	RC	Added Auto Allocation section to 16bit Support for TrakaWEB – Section 7.22	
8.8	03/05/19	JO	Minimum SQL & OS versions supported changed	
8.9	12/06/19	RC	Amended introduction added to RRMS section 5.10.1	
9.0	31/07/19	RC	Clarification on RRMS pre-setup in section 5.10.3	
9.1	10/09/19	RC	Updated software release versions. Catalan added to language settings in section 3.1. Updates made to email notifications email template. Section 5.6.	
9.2	11/10/19	RC	Added 'Attempted System Access Exception Report' – Section 4.5	
9.3	20/11/19	RC	Change to System access screen to reflect user start/expiry date.	
9.4	28/02/20	RC/JO	Update to Software Permission Groups. Added new section for Multi-Select/Multi-Edit. Added section for Authoriser and Authoriser from a Different Group. Added information for accessing Support Log Files.	
9.5	01/05/20	RC	Removed Windows 7 references. Added section for removing fingerprint template. Updated support site link. Added new Distance Reports. Update to MSME for phase 2 release including curfews and filtering for Item Access Groups. Update for Authorisers on Return with additional Authorisation column added to User page.	
9.6	01/07/20	RC	Updated system editing. Added section for TWDI. Updated Item Booking Software Permissions.	
9.7	17/08/20	RC	Update to 'Not Seen In a While Reports' with added timescale filters. Added software permissions information to Item Booking section. Expanded on the Regions section to explain 'rules'. Added information in RRMS for differences between IAG & CIAG.	
9.8	16/09/20	RC	Updated MSME section with information for 'Set User Systems Allowance'. Update to standard Authorisers section.	
9.9	13/01/21	RC	Added 'Book for Yourself' Software Permissions information to Item Booking section. Replaced icons in Fault Logging, Emergency Release and Curfews sections. Removed 32bit support from prerequisites. Added new section for Scheduled Reports.	
10.0	12/02/21	RC	Added Mandatory Fields to Edit Users. Added new section for Temporary Key Store. Added new section to MSME for removal of Grant All/Revoke All buttons.	
10.1	12/05/21	RC	Updated Item Booking section for adding users to existing	
10.2	04/10/21	RC	bookings. Updated documentation with increased granularity in software permissions	
10.3	19/10/21	RC	Added section for Allowance Across Systems Advanced FIFO	
10.4	02/12/21	RC	Added section for Allowance Across Systems Fixed Return	

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10.5	10/05/22	RC/LS	Added details for Item Access by Item Access Group Report. Added section for Item Pairing.	
10.6	06/07/22	RC	Updates to sections regarding Unrestricted Software Item Access	
10.7	30/08/22	RC	Note added to report filters for language specifications prior to generating a report.	
10.8	04/11/22	RC	Added new EULA information	
10.9	29/11/22	RC	Added information for Software Permissions Groups. Added information for Remote Release to Item Pairing.	

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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 V3.16
- Traka Touch V3.1
- 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/card numbers 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

Originally, the manufacturer of one of the world's first electronic key management systems in 1990 - we are now considered as world leaders in innovative technology for sophisticated, intelligent key management systems and lockers solutions to manage and control access to your most important assets. In April 2012 Traka was acquired by ASSA ABLOY, the world leader in door locking solutions.

Traka is used extensively in the UK and in over 30 countries worldwide supported by our network of distributors and resellers. Our market sectors span many industries and include Distribution and MHE Management; Fleet Management in Police, Road Haulage and Car Dealerships; Property Access Control in Prisons, Secure Units, Hospitals, Hotels, Schools, Universities and Managed Accommodation; Equipment, Asset Management and Control in Casinos, Petrochemical, Mining, Airports, Docks, Railways, Quarries, Military and Emergency Services.

Traka Service

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

The service provision you can expect from Traka will include...

- An experienced engineer to install the system at your site
- A project manager to help you plan your system configuration your keys, users, their permissions and reports you want to prepare
- Training for your users and administrators
- Aftercare from our account management team
- Telephone assistance using our dedicated help line direct to our UK support center
- Optional 3- and 5-year maintenance contracts are also available

2. TRAKAWEB

2.1 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
- UD0061 TrakaWEB Getting Started Guide
- UD0011 Traka Touch 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 2019 with IIS10 (3GHz Xeon, 8GB RAM, 500 GB HD)
- Windows Server 2016 with IIS10 (3GHz Xeon, 8GB RAM, 500 GB HD)
- Windows Server 2012 R2 with IIS8.5 (3GHz Xeon, 8GB RAM, 500 GB HD)
- Windows Server 2012 with IIS8 (3GHz Xeon, 8GB RAM, 500 GB HD)
- Windows 10 (Professional or Enterprise editions) with IIS10 (3GHz i3, 8GB RAM, 500 GB HD)
- Windows 8.1 (Professional or Enterprise editions) with IIS8.5 (3GHz i3, 8GB RAM, 500 GB HD)
- Windows 8 (Professional or Enterprise editions) with IIS8 (3GHz i3, 8GB RAM, 500 GB HD)
- 64-bit support
 Physical or Virtual machine support

The following Databases are supported:

 SQL Server (incl. Express version) may be configured to 'Mixed Mode Authentication' or 'Windows Authentication'.

The following Client Browsers are supported:

- **Internet Explorer** (latest version recommended, support up to v3.13 TrakaWEB only)
- **Google Chrome** (latest version recommended)
- Mozilla Firefox (latest version recommended)
- **Safari** (for Mac only latest version recommended)
- **Microsoft Edge** (latest version recommended)

2.2 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.

Copyright © 1997-2023 Traka

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 though 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

V10.9 29/11/22

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.

2.4 COPYRIGHT

This manual and the programs to which it refers are copyrighted and all rights reserved. You are not permitted to:

- Copy this manual by any means
- Allow other people to have copies of the programs
- Use the programs on more than one machine at a time

Any such actions may be regarded as intent to defraud, and action may be taken.

2.5 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: **http://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

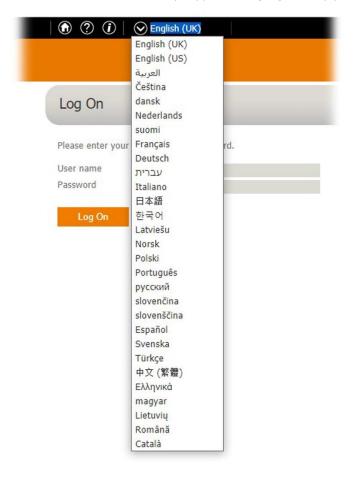
You can also write to us.

Address: Traka 30 Stilebrook Road Olney Buckinghamshire MK46 5EA United Kingdom

3. GETTING STARTED

3.1 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.



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3.2 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 - TD0013 - TrakaWEB Installation & Configuration Guide for more information on your TrakaWEB URL.

	inglish (UK)	Log On traka.com
		traka Assa Ablor
		ASSA ABLOY
Log On		
Please enter your userr	ame and password.	
User name		
Password		
Log On		

Enter your user name 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 <u>Disable & Clear Auto-Fill Information</u> section.

3.3 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 <u>User Details</u> grid under item access tab.

3.4 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.

3.5 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.

Aston Martin	
Status: 🔘	52
Previous user: Aaron Kennedy	

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

aite System /	Access Theirs Access	Region Access	Web Access	History	
ser.					
orename:	Aaron				
Burname:	Kennedy				
Sisplay Name Override:	0				
Display Name:	Aaron Kennedy				0
Details					
anguaga:	English (UK)				5
staff Number:	English (UK)				
Position:					
Fel:	Technical Illustrator				
ax:	01234 712345				
Mobile:					Choose File No file chosen
imail:	ak@#aka.com				
Ste:	ak@rtaka.com				
Juilding:	Main Traka Office				
Breet, Town:	main maka Office				
fostande:	MK46 SEA				
Votes:	00000.000				
10000000					

3.6 TRAKAWEB INTERFACE

3.6.1 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 - Help Button

Selecting this button launches the built in TrakaWEB User Guide.

3 - Information Button

Clicking this will show a small 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.



Selecting this button will display a list of <u>languages</u> 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.

5 - User Name

Here the currently logged in user's name is displayed.

6 - Log Off Button

Clicking this will log you out of TrakaWEB.

7 - Traka Website Link

Clicking <u>traka.com</u> will take you to the main Traka website.

8 - Page Name & Icon

Each page of TrakaWEB will display the title of that page along with an icon.

3.6.2 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. Columns can be added, moved and deleted from a grid simply by using the <u>Show/Hide Grid Columns</u> tool located at the top of the page in the <u>Ribbon</u> <u>Toolbar</u>.

	Tabs		Colu	imns
Item Activity Access	System Activity	Iter	ns	
Activity 📀	When	\odot	Who	\odot
App Startup	21/03/2013 16:5	1:53		
Admin Access	21/03/2013 16:2	8:37	ADMIN USE	R4
App Startup	21/03/2013 16:1	1:43		
Memory OK	21/03/2013 09:5	8:33		
Memory Low	21/02/2012 00-5	5.47		

Any combination of columns can be saved and stored for later viewing. These are known as Layouts. Please refer to the <u>Layouts Overview</u> 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 empty space of a column header to toggle the information from random to ascending first. Click again to sort to descending first.

Position		Position , 🧤		Position
14		1		10
16		2		9
19		3		8
4		4		7
5		5		6
11	-	6	-	5
8		7		4
20		8		3
10		9		2
9		10		1

Often there is a chevron button next to the column name. These also offer different options for filtering information. In the example below, the system chevron 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 'Blank' will display any system without a name whereas; 'Non-Blanks' will show every system that has a name.

System	\geq	
TT15893	(All)	-
Reception	(Blanks)	
TT15893	(Non blanks)	E
Reception	Reception	
Reception	TT15893	+
TT15893		- 18
TT15893		
Reception		
TT15893		
Reception		

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 the << or >> respectively.

		19	/03/	2013	10:18:31	
Unauthorised Item Returned				19/03/2013 10:18:31		
$\langle \langle \rangle$	0	1	2	0	>>	
	turned	turned			turned 19/03/2013	

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.

Page size:	10	-	 F	Page size:	10	+
					10	
					25	
					50	
					100	i.

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, there will be a 'grouping bar' located above the grid just under the ribbon toolbar that displays the message 'Drag a column header here to group by that column'.

NOTE: If the 'grouping bar' is not visible, select the 'search' button in the ribbon toolbar.

Drag a	column header here to	group by that column				
	System 😔	Position -	Description	Status 📀	who 📀	When 📀
0	Ground Floor		Aston Martin ,Building Key	In System	Aaron Kennedy	04/04/2013 16:59:37
a .	Ground Floor	2	Research & Development	In System	Aaron Kennedy	03/04/2013 16:14:52
	Ground Floor	3	ford transit	In System	Aaron Kennedy	03/04/2013 16:14:58
	Ground Floor	4		In System	Aaron Kennedy	03/04/2013 16:15:05
•	Ground Floor	5		In System	Aaron Kennedy	03/04/2013 16:15:22
•	Ground Floor	6		In System		14/03/2013 14:06:32
9	Ground Floor	7	Wally	In System		14/03/2013 14:06:32
	Ground Floor	8		In System		14/03/2013 14:06:33
	Ground Floor	9		In System		14/03/2013 14:06:33
9	Ground Floor	10		In System		14/03/2013 14:06:33

In the grid 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, you would see three separate lines with details on that position number in each of the three systems.

2	osition -	•								
	Sync	System	۲	Description	Status	۲	Who	0	When	۲
•	Positio	in: 1								
	0	Ground Floor		Aston Martin ,Building Key	In System		Aaron Kennedy		04/04/2013 16	:59:37
	Position: 2									
	0	Ground Floor		Research & Development	In System		Aaron Kennedy		03/04/2013 16	:14:52
	Positio	m: 3								
	۲	Ground Floor		ford transit	In System		Aaron Kennedy		03/04/2013 16	:14:58
•	Positio	in: 4								
•	Positio	m: 5								
+	Positio	in: 6								
•		m: 6								

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.

Thinking II		ame		n martin de la company					 Everyone 	Group 😔
					No data to di	splay				
4										
No data t	o paginate 🛛 🔇	00	\odot					Page size:		10
Treate	Filter									
Grant Access	All Revol	ke All	Detail 1 🔍	Detail 2	👽 Detail 3	\odot	Detal 4 😡	Detal 5 🔍	7.00	
Access	New System		Detail 1	Reception	S Decai 3			Detail 5		
	New System	2		reacuption					Key	
	New System	3		Reception			0003		Key	
	New System	4							Кеу	
	New System	5							Кеу	
	New System	6		Ground Floor			0006		Key	
	New System	7		First Floor			0007		Key	
	New System	8							Кеу	
	New System	9							Кеу	
		10							Кеу	
	New System									

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

System - 😔		Detail 1	\odot	Detail 2	\odot	Detail 3	(\bigcirc)	Detail 4	\odot	Detail 5	\odot	Туре	0
New System	2											Key	
New System	3			Reception				0003				Key	
New System	4											Key	
New System	5											Key	
New System	6			Ground Floo	or			0006				Key	
New System	7			First Floor				0007				Кеу	
New System	8											Key	
New System	9											Кеу	
New System	10											Key	
		00											20
	New System New System New System New System New System New System New System	New System 1 New System 22 New System 33 New System 44 New System 55 New System 66 New System 77 New System 88 New System 99	New System 1 New System 2 New System 3 New System 4 New System 5 New System 6 New System 7 New System 8 New System 9	New System1New System2New System3New System4New System5New System6New System7New System8New System9	New System 1 Reception New System 2 New System 3 Reception New System 4 New System 5 New System 6 Ground Flor New System 7 Pirst Floor New System 8 New System 9	New System 1 Reception New System 2 New System 3 Reception New System 4 New System 5 New System 6 Ground Floor New System 7 First Floor New System 8 New System 9	New System 1 Reception New System 2 New System 3 Reception New System 4 New System 5 New System 6 Ground Floor	New System 1 Reception New System 2 New System 3 Reception New System 4 New System 5 New System 6 Ground Floor New System 7 First Floor New System 8 New System 9	New System 1 Reception 0001 New System 2 New System 3 Reception 0003 New System 4 0003 New System 5 New System 6 Ground Floor 0006 New System 7 Frst Floor 0007 New System 8 New System 9	New System 1 Reception 0001 New System 2	New System 1 Reception 0001 New System 2	New System 1 Reception 0001 New System 2 New System 3 Reception 0003 New System 4 New System 5 New System 6 Ground Floor 0006 New System 7 First Floor 0007 New System 8 New System 9 Internet	New System 1 Reception 0001. Kay New System 2 Kay New System 3 Reception 0003 Kay New System 3 Reception 0003 Kay New System 4 Reception 0003 Kay New System 5 Reception Kay New System 6 Ground Floor 0006 Key New System 7 Frst Floor 0007 Key New System 8 Image: State

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

		oke All						
Access	System 🔺 🧕) Pos. 🔺	Detail 1 🛛 😔	Detail 2 🛛 🥹	Detal 3 😔	Detai 4 🛛 😔	Detal 5 📀	Туре 📀
	New System	3		Reception		0003		Кеу
	New System	6		Ground Floor		0006		Кеу
	New System	7		First Floor		0007		Key
4								
Page 1 of	f 1 (4 items)	001	00				Page size:	20

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

	All Revol	ke All						
Access	System 🔺 🤡	Pos. •	Detail 1 🛛 😔	Detail 2 🛛 🥹	Detal 3 🛛 😔	Detai 4 🛛 😔	Detail 5 🛛 😒	Туре 📀
~								
V	New System	3		Reception		0003		Кеу
	New System	6		Ground Floor		0006		Key
	New System	7		First Floor		0007		Key
(
Page 1 o	f 1 (4 items) 🛛	3 (3 1	00				Page size:	20

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

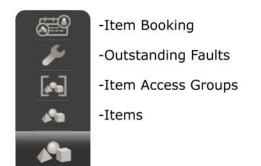
3.6.3 TOOLBARS

3.6.3.1 NAVIGATION TOOLBAR

At the bottom of each screen, you will notice the Navigation toolbar. 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.

			E.	۵	Î		© (
System Viewer	Users	Items	Reports	Software Settings	iFobs	Systems	Realtime Activity

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





Clicking the orange arrow at the end of the toolbar will minimise it to the left-hand side of the screen. Clicking a second time will restore it to its original size.



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

3.6.3.2 RIBBON TOOLBAR

Located at the top of most pages throughout TrakaWEB is the Ribbon 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.

🕑 Default	Reception		> II -H -T 🙀 🖡	7
Region	System	Edit	Contraction of the second s	Export

The drop-down sections on the toolbar consist of System, Region and Status selection. Clicking the small arrow button next to the system or region name will display a list of the systems/regions that currently exist in your database. For more information, please see the separate topics for <u>Systems</u> and <u>Regions</u>. The status 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 ribbon toolbar. On the right hand side of the toolbar, you will see columns such as Region, System, Status, Type 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.

				Tel 📀	Mobile 🤆
۲	Super Admin				
•	Marcus Bunting				
•	Tim Davis	1095	Senior Software Developer	01234 712345	
•	Simon Dixey		Senior Software Developer	276	
۲	Simon Fleck	2365	Accounts Assistant	01442 978660	
•	Frederic Geneix	1255	Business Development Manager	01234 712345	
۲	Wayne Kynaston	1799	UK Sales	01234 712345	07854 902199
٠	Simon Mansfield	2585	Fleet Manager	01234 712345	07199 858585
٠	Mick Marshall	2589	Contract Security Manager	01366 375985	
۲	Peter Mather	1777	Finance Manager	01234 712345	
۲	Steve Newell	1033	Production Manager	01234 712345	
•	Paul Robinson				
۲	Sam Slater	1122	Techincal Support	01234 712345	07111 123111
•	Matthew Trickett	1078	IT Support Technician	01234 712345	
•	Daniel Waters	1049	Software Developer		
•	Wendy Weston	3256	Sales Service Manager	01234 712345	07795 164552
۲	Duncan Winner	1296	Technical Director	01234 712345	08111 111111

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.

41.2	• II 🖬 🖬 🕱		Research & Developmen	(All Systems)	(All Users)
Edit	Customea	Ereort	Region	(All Systems)	Active
				Reception Meeting Room	
				TKC22120	

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

		Staff Number 😒	Postion 📀	Tel 🔍	Fax: 🕑	Mobile 🕑
			Technical Blustrator			
•	Bily Tabutt		Integration Engineer	01234 712345		
•	Daniel Waters	1049	Software Developer			

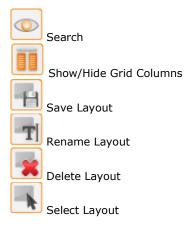
Common Buttons in TrakaWEB

The buttons and options on the ribbon toolbar 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



Customise Options



Export Options



Export to PDF

Export to Excel

3.6.3.3 GENERAL OPTIONS



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



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.



Delete

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.



Save

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



Save & Return

The Save & 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.



Cancel & Return

The Cancel & Return 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.

4. MAIN USER GUIDE

4.1 RIBBON TOOLBAR

4.1.1 CUSTOMISE OPTIONS

4.1.1.1 SEARCHING

Throughout TrakaWEB, you can Search <u>grids</u> for specific information. Selecting the search button from the <u>ribbon</u> <u>toolbar</u> will enable you to search for a user, activity, item description etc. directly from each column in the <u>grid</u>.

The example below shows the search feature being used on the Activity grid from the system viewer. Although the grids throughout TrakaWEB are different, the principle of the search tool remains the same.

- 1. Click the search button from the ribbon toolbar.
- 2. Each column in the grid will have its own search field. If you want to know what activities transpired between two dates, then you would search those dates in the 'When' column. In the example below the name Duncan has been entered into the 'Who' column of the Item Activity grid.

Item Activity Access	Sys	stem Activity Items				
Activity	\odot	When	Who			
	\$		Duncan			
Item Returned		15/03/2013 16:44:40	Tim Davis			
Item Removed		15/03/2013 16:44:16	Tim Davis			
Item Returned		15/03/2013 16:44:03	Andrew Palmer			
Item Removed		15/03/2013 16:40:35	Andrew Palmer			
Item Returned		15/03/2013 16:37:55	Duncan Winner			
Item Removed		15/03/2013 16:37:43	Duncan Winner			
Unauthorised Item Retu	urned	15/03/2013 15:56:09				
Item Removed		15/03/2013 15:56:02	Aaron Kennedy			
Item Returned		15/03/2013 15:55:59	Aaron Kennedy			
Item Removed		15/03/2013 15:55:57	Aaron Kennedy			
Item Returned		15/03/2013 15:55:55	Aaron Kennedy			
Item Removed		15/03/2013 15:55:53	Aaron Kennedy			

TrakaWEB will now search for any activities that have transpired against anyone with the name Duncan.

Activity	\odot	When	Who
Item Returned		15/03/2013 16:37:55	Duncan Winner
Item Removed		15/03/2013 16:37:43	Duncan Winner
Item Returned		13/02/2013 13:17:57	Duncan Adams
Item Removed		13/02/2013 11:57:51	Duncan Adams

TIP: As you can see in the example above, there are two users with the same first name. Therefore, to find the specific data' add as much information as possible into your searches. In this example, adding a second name would narrow the search down to a particular user rather than a group of users who share a first name.

Activity 📀	When	Who
Item Returned	15/03/2013 16:37:55	Duncan Winner
Item Removed	15/03/2013 16:37:43	Duncan Winner

Search Filters

When the search feature is enabled, a small grey 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.

Who	
•	 Begins with
Tim Davis	Contains
Tim Davis	Doesn't contain
Andrew Palmer	Ends with
Andrew Palmer	Equals
Duncan Winne	Doesn't equal
Duncan Winner	

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 Duncan into the 'Who' column, the bottom left of the grid will display the current filter setting. In the image below, the filter was set to 'Begins with Who' and the search term was 'Duncan'. Which means any activities generated by anyone named Duncan will be displayed in the activity grid. At the bottom left-hand side of the grid in red text 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.

Activity	\odot	When	Who
Item Returned		15/03/2013 16:37:55	Duncan Winner
Item Removed		15/03/2013 16:37:43	Duncan Winner

The Filter Builder will list the filters used to generate the last search. In this case, the filter was set to the column 'Who' (highlighted blue), the value searched against was 'Begins With' (highlighted green) and the search term was 'Duncan' (highlighted grey).

Filter Builder				R
And O				
Who Begins w	r <mark>ith</mark> Duncan @	3		
	ОК		Canc	ol

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 blue, the second is the filter value highlighted green and third is the search term highlighted in grey.

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

Filter Builder		8
And O		
Who Begins w	vith Duncan 😳	
Activity Begin:	<mark>s with</mark> <enter a="" td="" va<=""><td>lue> 🕲</td></enter>	lue> 🕲
	ОК	Cancel
		2

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4.1.1.2 LAYOUTS OVERVIEW

A Layout is a combination of columns you can apply to most of the <u>grids</u> 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 <u>System Viewer</u> 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.



NOTE: All layouts are exclusive to the grids or tabs, 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 <u>Select a Layout.</u>



4.1.1.3 SHOW/HIDE GRID COLUMNS

Throughout TrakaWEB, there are many <u>grids</u> that display important information for the page you are currently viewing. For example, the <u>System Viewer</u> has the Activity & Access Grid, which has four different tabs that display all the information for the currently selected position. The Show/Hide Grid Columns button allows you to add or remove fields of your choice to the tab 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 tab is different and the fields that can be placed and taken away will vary from grid to grid. In the example below, we have selected the field 'Mobile' to be added to the grid.

From the ribbon toolbar, select the Show/Hide Grid Columns button. A small window will appear with a
number of different fields to add to your 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. In the example below, the fields you can select from are relevant to user i.e., mobile number,
fax, email etc. These fields are definable in the <u>User Fields</u>.

Item Activity Access Sy	stem Activity Rems	
Who		
Tim Davis		
Duncan Winner		
Aaron Kennedy		
010	Page size:	10 🔽
	Field Cl	100ser 😣
	Building	, ^
	Email	
	Fax	
	Mobile	0.000
	Notest	est
	Notest	esc

2. To add a column to your grid, simply drag and drop the desired field between the other columns. The black arrows will indicate where the new field will fit into the grid.

Who	Mobile	
Tim Davis		
Duncan Winner		
Aaron Kennedy		
0 1 0	Page size:	10 🔽
	P	
	Field Choose	er 🙆
	Building	-
	Email	E
	Fax	
	Mobile	
	Notestest	

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

Who	Mobile
Tim Davis	07896584111
Duncan Winner	07892685771
Aaron Kennedy	07702856791

4. You can add multiple fields to a grid by simply following steps 1-3.

Who	Mobile	Position
Tim Davis	07896584111	Senior Software Developer
Duncan Winner	07892685771	Technical Director
Aaron Kennedy	07702856791	Technical Illustrator

5. 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 <u>Layout</u>. Please review the following topic to <u>Save a Layout</u>.

4.1.1.4 SAVE LAYOUT

After you have customised a <u>grid</u> 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 <u>layout</u> without having to select different columns/fields.

- 1. Click the 'Save Layout' button at the top of the page in the Ribbon Toolbar.
- 2. 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.

Specify a new name for the layout:	
Advanced User Information	
Overwrite an existing layout:	11
Default	

- 3. Enter a name for the layout and click Confirm.
- 4. The layout is now saved and can be renamed, deleted or selected from the Ribbon Toolbar.



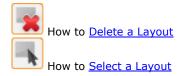
4.1.1.5 RENAME LAYOUT

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

- 1. Click the Rename Layout button at the top of the page in the <u>Ribbon Toolbar</u>.
- 2. The following window will appear prompting you to select a layout and enter a new name.

pecify a new layout name:	
Information	
choose layout from list below to be renamed:	
Advanced User Information	
Email	
Default	
postcode	
Fax & Notes	
Confirm Cancel	

- 3. Once you have selected the desired layout and typed in its new name, click the Confirm button.
- 4. The layout is now saved against its new name. You can delete or select it from the Ribbon Toolbar.



4.1.1.6 DELETE LAYOUT

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

- 1. Click the Delete Layout button at the top of the page in the <u>Ribbon Toolbar</u>.
- 2. The following window will appear prompting you to select a layout to delete.

Advanced User Informatio	n		
Site & Telex			
Email			
Default			
postcode			
Fax & Notes			

- 3. Once you have selected the desired layout click the Confirm button.
- 4. The layout has been deleted and is no longer selectable or editable.



How to Select a Layout

4.1.1.7 SELECT LAYOUT

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

- 1. Click the Select Layout button at the top of the page in the <u>Ribbon Toolbar</u>.
- 2. The following window will appear prompting you to select a layout to view.

Site & Telex		
Email		
Default		
postcode		
Fax & Notes		

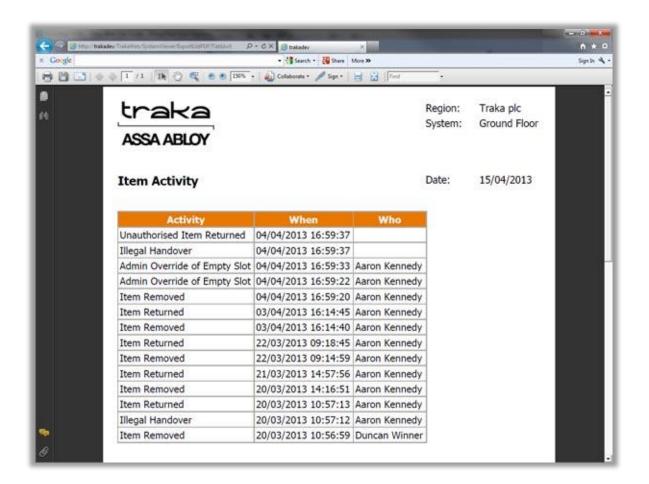
- 3. Once you have selected the desired layout click the Confirm button.
- 4. The previous layout being displayed on the grid will now change to the newly selected layout.



4.1.2 EXPORT OPTIONS

4.1.2.1 EXPORT TO PDF

In TrakaWEB, it is possible to export the data from whatever grid you are viewing into PDF format. Simply select the Export to PDF button from the <u>ribbon toolbar</u> and TrakaWEB will open a new tab in your browser with the currently viewed data into a PDF.



4.1.2.1 EXPORT TO EXCEL

In TrakaWEB, it is possible to export the data from whatever grid you are viewing into a Microsoft Excel format. Simply select the Export to Excel button from the <u>ribbon toolbar</u> and TrakaWEB will generate a new tab in your browser with the currently viewed data into an Excel Spreadsheet.

	Ste Clipboard	- 10 - 7 <u>U</u> - ⊞ - <u>⊘</u> Font	$\begin{array}{c} \mathbf{A}^* \ \mathbf{A}^* \end{array} = = \begin{bmatrix} \mathbf{a} \\ \mathbf{a} \\ \mathbf{a} \\ \mathbf{a} \end{bmatrix}$
	L10 -	f_x	
	A	В	С
	Activity	When	Who
2	Unauthorised Item Returned	04/04/2013 16:59	
3	Illegal Handover	04/04/2013 16:59	
4	Admin Override of Empty Slot	04/04/2013 16:59	Aaron Kennedy
5	Admin Override of Empty Slot	04/04/2013 16:59	Aaron Kennedy
6	Item Removed	04/04/2013 16:59	Aaron Kennedy
7	Item Returned	03/04/2013 16:14	Aaron Kennedy
	Item Removed	03/04/2013 16:14	Aaron Kennedy
9	Item Returned	22/03/2013 09:18	Aaron Kennedy
10	Item Removed	22/03/2013 09:14	Aaron Kennedy
11	Item Returned	21/03/2013 14:57	Aaron Kennedy
12	Item Removed	20/03/2013 14:16	Aaron Kennedy
13	Item Returned	20/03/2013 10:57	Aaron Kennedy
14	Illegal Handover	20/03/2013 10:57	Aaron Kennedy
15	Item Removed	20/03/2013 10:56	Duncan Winner

4.2 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 - General Interface

The General Interface is the buttons and options located at the top of each page in the black and orange banner. This interface 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 <u>TrakaWEB Interface</u>.

2 - Ribbon Toolbar

The <u>Ribbon Toolbar</u> is located at the top of most pages throughout TrakaWEB and contains buttons and drop down menus relevant to each section.

Reception	😔 Default	IV 😽 🖀 🛓	🕑 💿 🖬 🖷 🖷	k 🛝 🖻 🔊 🖉	
System	Region	Tools	Customese	Export	

The drop down section to the left of the ribbon toolbar is for System and Region selection. Clicking the small arrow button next to the system or region name will display a list of the systems /regions that currently exist in your database. For more information, please see the separate topics for <u>Systems</u> and <u>Regions</u>.

The buttons on the right in the 'Tool' section are only relevant to the system viewer page. Other buttons in the 'Customise' & 'Export' sections can be found in other places in TrakaWEB. Please see below descriptions of each 'Tool' button and Hyperlinks to the relevant topics.



For more information on the 'Customise' & 'Export' buttons, please review the ribbon toolbar topic.

3 - 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.

The drop-down sections to the left of the Ribbon Toolbar are the System and Region selection. Clicking the small arrow button next to the System or Region name will display a list of the Systems/Regions that currently exist in your database.

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 \checkmark 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 \checkmark 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.

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4 - System & Item Detail Panels

The system & Item Detail Panels will be located either below the cabinet image (if the system is a Key cabinet) or to the right of the Locker/System Viewer Grid (if the system is a Locker). 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.

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 2 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 11:32 on the 20/11/19 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 <u>reports</u> for a more in depth look at these activities.

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.

Item Activity (iFob Activity		iFob Access Syste		System Activity	Items
Activity	ctivity 📀		When		Who
Unauthorised Item Returned		15/03/	2013 15:56:09		
Item Removed		15/03/	2013 15:56:02	Aaron Kennedy	
Item Returned		15/03/	2013 15:55:59	Aaron Kennedy	
Item Removed		15/03/	2013 15:55:57	Aaron Kennedy	
Item Returned		15/03/	2013 15:55:55	Aaron Kennedy	
Item Removed			15/03/	2013 15:55:53	Aaron Kennedy

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.

Item Activity IFob Activity		iFob Access System Activity		Items	
Activity	6	$\overline{\mathbf{v}}$	When		Who
Return Notes N	lot Entered		01/09/2	014 09:50:21	Aaron Kennedy
Item Returned		01/09/2	014 09:50:16	Aaron Kennedy	
Item Removed		01/09/2	014 09:50:14	Aaron Kennedy	
Return Notes N	lot Entered		29/08/2	014 11:35:46	Aaron Kennedy
Item Returned		29/08/2014 11:35:42		Aaron Kennedy	
Item Removed			29/08/2014 11:35:41		Aaron Kennedy
Linauthorisod I	Linauthorised Item Returned		20/02/2	14 11/06/44	

iFob Access

This tab lists the users who currently have access to the selected position.

Item Activity	iFob Activity	iFob Access	System Activity	Items	
Who					
Duncan Winne					
Aaron Kenned	y				

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.

Item Activity IFob Activity	IFob Access Sy		System Activity	Items
Activity	\odot	When		Who
Door Closed		15/03/	2013 15:56:03	Aaron Kennedy
Door Opened		15/03/	2013 15:55:39	Aaron Kennedy
Admin Access		15/03/	2013 11:40:18	
Admin Access		15/03/2013 09:58:11		
Memory Low		14/03/2013 17:21:03		
Memory OK		14/03/2013 17:20:23		

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.

Item Activity	IFob Activity	IFob Access	System Activity	Items
iFob Descripti	on			
red car 2,Safe	Кеу			
red car 2,Safe	Кеу			

6 - Navigation Bar

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

4.2.1 TRAKAWEB SYSTEM VIEWER GRID

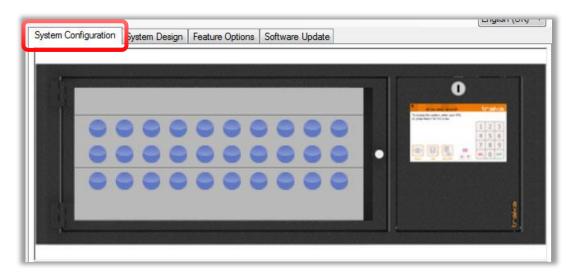
Due to the many permutations of physical locker designs, it is not always possible to display the interactive image of the locker within the TrakaWEB system viewer. Currently, there are only a subset of locker images available to use and so to resolve the issue, a System Viewer Grid is used. The System 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.

System Details System	New System			
System	new System		Online	
Product Family	S-Series	~	Software Version	02.10
Serial Number	M-Series S-Series		OS Version	4.3
IP Address	L-Series Lockers	-	9998	Allow Pin
MAC Address	Demonstration Series			
Comms Engine	Comms Engine on UKOLND-A11436	~	Positions	60
Region	Default	~	Rows	6
Software Version			Columns	10
	Save		1	

The screen will change to display the default locker image.

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

System Configuration	System Design	Feature O	ptions	Softw	are Up	date		
	-	Q	9,	-	Q	-	P	
	-	9	9	E	9	E	P Q	-
	- C					-		-
	2	Q	8	-	2	-	9	
		4	0	-	9	-	a	
	-	Q. ·	0	-	9	-	e.	
	-	Q	9	E	9	E	a	
	2	Q · ·	9	-	Q.	-	9	
						11		

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

☑	Use System V	fewer Grid display						
	Door	Product Type		Start	Positions	Physical Start	Physical Count	Interfac No
k	1	Traka Touch M 2	×	1	20	0	0	0

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.

	Product B	fuilder	Delete Extension		Add Extensio	n	Save	_
~	Use Systen	n Viewer Grid Displa	iy.					
	Door	Product Type		Start	Positions	Physical Start	Physical Count	Interface No

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.

Product	Builder	Delete Extension		Add Exten:	sion	Sav	e 📄
🖌 Use Syste	m Viewer Grid Disp	lay					
1	los rozas		1993 B 101	1.00 0	Physical	Physical	Interface
Door	Product Type		Start	Positions	Start	Count	No

	Product B	uilder Delete Extension		Add Exten:	sion	Sav	∋ _
Z U	se System	Viewer Grid Display					
	Door	Product Type	Start	Positions	Physical Start	Physical Count	Interfac No
-		V		1	Jian		
107		om product type please enter position	1 1 1	1 14		0	0

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.

System Configuration	System Design	Feature Options	Software Upda	ste
	000	🕞 English (UK)		
	🔿 System	liewer		
	Default:	Report	NASTE	
	Pes	Description G	Statun 👻	Locker
		Pool Car	Out Of System	Status: O 24/03/2016 14:06:08
	0 2	Peol Van	In System	Connected
	0 3	Stock Van Spare Vehicle	In System In System	(- t
		Spare vehicle Vehicles - Finance	In System	
	0 5 0 6 0 7 0 8 0 9	100000 - 100000	In System	Status: \Theta
	0 7		In System	
	0 1	FD3	In System	And the second sec
	9	FD2	In System	Bert Activity (Feb Actuity) (Feb Accura
	10		In System	Activity 🗢 Whee
	0 11	Stationery	In System	Married Control of Con
System Details	11		A CIP CARA	An transfer and Antonious
System	New S	ystem 6		Online
Product Family	Locken	3		Ŷ
Serial Number				

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 return type the system has been assigned. A typical System Viewer Grid may appear as shown below:

	Default	Region	⊘ Lo	ocker	System	1	/ 🤧 🚬 (<u>è</u>
1	Pos		\bigcirc	Status		Locker	Eur	
			\smile		\odot		102/2016 14-0	C.00
	1	Pool Car		Out Of Syst	em	_	/03/2016 14:0	6:08
0	2	Pool Van		In System		Connected		
0	3	Stock Van		In System				
0	4	Spare Vehicle		In System		A 1		
0	5	Vehicles - Finance		In System		Status: 🔾		
•	6			In System				
•	7			In System				
0	8	FD3	_	In System				
0	9	FD2		In System		Item Activity	iFob Activity	iFob A
0	10	FD1		In System		Activity	\bigcirc	When
0	11	Stationery		In System			\bigcirc	
0	12	Clothing	_	In System		Item Removed		24/03
0	13	Shredding Cabinets		In System		Item Returned		23/03
	14	Joan - Desk		Out Of Syst	em	Item Removed		23/03
0	15	Unit 12 Gas		In System		Item Returned		22/03
•	16			In System		Illegal Handove	er	22/03
	17	Martyn Baker		Out Of Syst	tem	Item Removed		22/03
0	18	HR1	_	In System		Item Returned		21/03
0	19	HR2		In System		Illegal Handove	91°	21/03
0	20	HR3		In System		Item Removed		21/03
	-			r	•	Item Returned		18/03
< <u>1</u>	\mathbf{O}		Pa	age size:	20 🔽	Item Removed		18/03
? Creat	e Filter					Item Returned		18/03
						Item Removed		18/03
						Item Returned		18/03
						Item Removed		18/03

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.

	Pos. 🔺	Description 📀	Status 📀
	1	Pool Car	Out Of System
0	2	Pool Van	In System
0	3	Stock Van	In System
0	4	Spare Vehicle	In System
•	5	Vehicles - Finance	In System
	6		In System
	7		In System
0	8	FD3	In System
•	9	FD2	In System

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's in position 6 and 7 have been removed from the system. Two new rows are created at the bottom of the grid reflecting their current status.

	Pos. 🔸	Index 🔶	Description 😔	Status 📀
0	1	1	Silver Ford Focus	In System
0	2	2	Red Ford Focus	In System
	3	3	Silver Ford Focus	In System
0	4	4	Silver Mercedes	In System
•	5	5	Grey Audi	In System
	6			Out Of System
	7			Out Of System
	8	8		In System
•	9	9		In System
•	10	10		In System
		6	Transit Van 2	Out Of System
		7	Transit Van 1	Out Of System

4.2.2 RIBBON TOOLBAR BUTTONS

4.2.2.1 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 small 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.

4.2.2.2 REMOTE USER LOGIN

This option allows someone using TrakaWEB to remotely log another user into the system. Selecting this icon from the ribbon toolbar 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.

4.2.2.3 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 small 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.

4.3 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 <u>Multi-Select/Multi-Edit</u> feature.

4.3.1 USERS LIST

From the <u>Navigation Toolbar</u> select the 'Users' icon. 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 <u>Add Users</u>.

Edit		Customise) (All	Systems) System		(All	Users) Active		
⊘ 0	Sync	Display Name 🔹 📀	Staff Number 🛛 🛇	Job Role	\odot	Tel	\odot	Fax	\odot	Mobile	\odot
	0	Office Manager	2345	Office Manager		01234 456765					
	•	Production Manager	0987	Production Manager		01234 456567					
	٠	Standard User 1	4567	Standard User							
		Standard User 10	8765	Standard User							
4											Þ
Page 1 of 2	2 (26 item:	s) 🔇 🔇 🗕 2 🜔 💓							Pag	e size: 20	-
P Create Fil	<u>lter</u>										

Region, System & Active Filters

When looking at the user list, you can filter which users are displayed by using the Region, System and Active dropdown filters located on the right-hand side of the <u>Ribbon Toolbar</u>. 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 <u>Regions</u> and <u>Systems</u> 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 <u>grids</u> 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 <u>Show/Hide Grid Columns</u> button 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 <u>user detail fields</u>.

4.3.2 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.

Edit		Customise	(All Regions)		ll Systems) System	(All Users)	
⊘ 0	Sync	Display Name 🔹 📀	Staff Number 📀	Job Role 📀	Tel 📀	Fax 📀	Mobile 📀
	0	Office Manager	2345	Office Manager	01234 456765		
	٠	Production Manager	0987	Production Manager	01234 456567		
	٠	Standard User 1	4567	Standard User			
		Standard User 10	8765	Standard User			
4							
Page 1 of 2	(26 items	5) 🔇 🔇 1 2 📀 🔊				Pag	je size: 20 🔽
P Create Filt	ter						

Details

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

ails System A	Item Access	Region Access	Web Access	History	
lser					
orename:	Traka				
Surname:	Administrator				
Display Name Override:					
Display Name:	Traka Administrator				
Details					
.anguage:	System Default	•			
Staff Number:	1234				
lob Role:	Administrator				
Fel:	01234 123123				
Fax:					
Mobile:					Choose File No file chosen
Email:	traka_admin@traka.com	m			
Site:					
Building:	Main Office				
Street, Town:					
Postcode:					
Notes:					

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 'Duncan Winner', you could enable Display Name Override and enter 'Duncan Winner - Technical Director'.

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.

```
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```

User Details

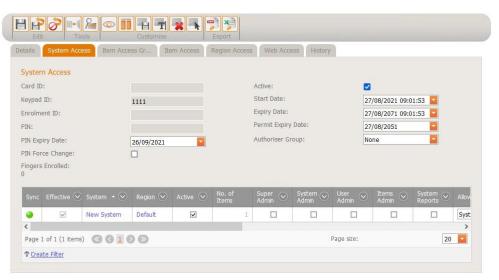
There are eleven detail fields available to store details about the user. Each field will have a default heading that is assigned when you install TrakaWEB, for example, email. You can change the headings of each field from the <u>User</u> <u>Fields</u> page.

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 systems the user has access to along with other settings such as Keypad/Card ID, PIN expiry date, Authorisation etc.



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: Card 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 (Card ID, Keypad ID or Fingerprint).

Card ID

Here you can input your swipe card ID number. Alternatively, you can swipe your card at the reader, click the Read Last Card Swipe button from the <u>Ribbon Toolbar</u> and have TrakaWEB automatically fill in the field for you.

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 <u>Sagem Fingerprint reader</u>. This feature allows you to set a temporary enrolment number that can be emailed to a user so that when he or she enters this enrolment number at the system they will immediately be prompted to swipe their card or enrol their fingerprint. Clicking the 'Random Enrolment ID' button from the ribbon toolbar 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, Card ID or Fingerprint. E.g., if you have a card ID as your primary level of access, when you log into the system you will be prompted for your PIN after swiping your card.

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 <u>Sagem Fingerprint reader</u>.

Active

Tick this selection box on or off to make the user active or not active in all systems and regions.

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, admin & report permissions etc. These options may be refined by assigning roles to users through <u>software permissions groups</u>. This will in turn reflect the user's roles on Traka Touch. For more information on User Roles for Traka Touch, refer to **UD0011 – Traka Touch 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.

					No. of Items	Super Admin	System 🛇 Admin	User Admin 🛇	Items Admin 🛇	System Reports 🕑			Auth. Override				
•	~	New System	Default	~	1						System Default	-		Absolute	✓ Hour:1	😫 Minute: 0	\$
(
Page 1	of 1 (1 items)	6610	>>											Page size:			20
? Creat	e Filter																

System Access Grid

Effective

Simply select the tick box named Effective to allow the user to access the system.

System

This column will display the name of the system.

Region

This column will display the <u>region</u> to which the system belongs.

<u>Active</u>

Check this box to make the user active and allow them to use the 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.

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.

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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 eanble to ability to edit user records.

<u>User Admin</u>

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.

System Reports

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

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 <u>Authoriser</u> section for more information.

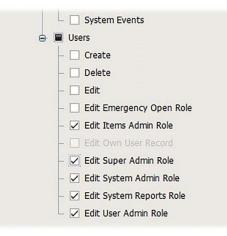
Authorisation Override

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 <u>Curfews</u> section for specific details.

Each of the Admin Roles on the System Access Grid can be enabled or disabled for different users through Software Permissions Groups as shown below.



Item Access

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

Item Access Groups

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

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.

stalis	िम्	tem Acce	ss Iten	Access	Re	gion Access	W	ab Access) H	story				
Item Ac	cess Groups													
Access		Name										- Everyor	ie Group	0
1		All Acce	ss - Directors											
		Cleaning	g Cupboar d											
		Custorne	er Filing Cupbo	ard										
		First Ald	i Cupboard											
		Fleet Ve	hide Keys											
		HR												
		Key Tes	t Group											
		Marketin	na											
		MRD												
♥ Create	of 2 (13 items) Eliter		1 2 0 0							Page size:			10	
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Page 1 o Create Item Aco Gran Acons S S S S S S S S S S S S S	12 (13 items) EEfter: EEfter: EA System 14C22120 14	CO O	Position • 1 2 3 4 5	Bogon Doisut Desut Desut Desut Desut Desut Desut	0	Dotal 1	0	Detail 2	۲		0	Dotal 4		
Page 1 o Team Aco Create Cr	12 (13 items) EEfter EEfter 144 R System 144C22120 144C22120 144C22120 144C22120 144C22120 144C22120 144C22120 144C22120 144C22120	CO O	Polition + 1 2 3 4 5 6 7 8	Bogoni Došut Dešut Dešut Dešut Dešut Dešut Dešut Dešut Dešut		Dotaf 1	•	Detail 2	0		0	Dutal 4		
Page 1 o © Create Item Acors Create	All R EEttar R EEttar R EEttar R System R MC22120 MC22120	CO O	Polition + 1 2 3 4 5 6 7 8 9	Rogoni Došut Došut Došut Došut Došut Došut Došut Došut Došut Došut	©	Dotaf 1	0	Detail 2	٢		•	Dutal 4		
Page 1 o Team Aco Create Cr	12 (13 items) EEfter EEfter 144 R System 144C22120 144C22120 144C22120 144C22120 144C22120 144C22120 144C22120 144C22120 144C22120	CO O	Polition + 1 2 3 4 5 6 7 8	Rogion Default Default Default Default Default Default Default Default	©	Dotaf 1	S	Detail 2	V		0	Dotal 4		

NOTE: For more information on Software Item Access Restrictions, refer to the <u>Software Permissions</u> <u>Groups</u> section.

Region

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

als	Sestem Access Them Access Region Access Web Access	History	
All Region			
a wakedoa			
Access			• 🔍

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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. It is possible to assign a user to a software access group here as well. For more information on Web Access groups, please see the <u>Groups</u> section.

tails Sys	em Access Rem Access	Region	Web Access	History	
Neb Login					
Web Windows User Na	ne: Andrew Palmer				
Web User Name:	Andrew				
Web Password:					
Details					

4.3.3 ADDING USERS

1. From the <u>Navigation Toolbar</u> select the Users icon. 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.

+ 🦺		Customise	All Regions) (All Regions)		All Systems) System	(All Users) Active	
⊘ 0	Sync	Display Name 🔹 📀	Staff Number 📀	Job Role 📀	Tel 📀	Fax 📀	Mobile 📀
	۲	Office Manager	2345	Office Manager	01234 456765		
	•	Production Manager	0987	Production Manager	01234 456567		
	۲	Standard User 1	4567	Standard User			
		Standard User 10	8765	Standard User			
4							1
Page 1 of 2	(26 items	s) 🔇 🔇 1 2 👂 🔊				Pag	e size: 20 🔽
Create Fi	Itor						

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

	icess Item Access	Region Access	Web Access	History	
Jser					
Forename:	Traka				
Surname:	Administrator				
Display Name Override:					
Display Name:	Traka Administrator				
Details					
anguage:	System Default				5
Staff Number:	1234				
ob Role:	Administrator				
Tel:	01234 123123				
ax:					
tobile:					Choose File No file chosen
Email:	traka_admin@traka.com	n			
ite:					
uilding:	Main Office				
Street, Town:					
ostcode:					
lotes:					

- 3. The new user record will now open. Input the appropriate details. For more information, please review the <u>User</u> <u>Details</u> section.
- 4. When you are finished, click the Save & Return button to go back to the user list. To add more users repeat this process from step 2.

4.3.4 EDITING USERS

1. From the ribbon toolbar, click the Users icon. 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.

	Customise	(All Regions) (All Regions)		C (Air	Systems) System		(All	Active		
Sync	Display Name 🔹 📀	Staff Number 📀	Job Role	\odot	Tel	\odot	Fax	\odot	Mobile	\odot
•	Office Manager	2345	Office Manage	er	01234 456765					
•	Production Manager	0987	Production Manager		01234 456567					
•	Standard User 1	4567	Standard User	r						
•	Standard User 10	8765	Standard User	r						
										,
6 items) 🔇 🔇 <u>1</u> 2 💟 🤍							Page	e size: 20	-
	o o o o tems;	 Office Manager Production Manager Standard User 1 Standard User 10 6 items) (< 1 2 > > 	Office Manager 2345 Production Manager 0987 Standard User 1 4567 Standard User 10 8765 6 items) Image: 1 mining the second s	Office Manager 2345 Office Manager Production Manager 0987 Production Manager Standard User 1 4567 Standard User Standard User 10 8765 Standard User 6 items) Image 2 Image 2	Office Manager 2345 Office Manager Production Manager 0987 Production Manager Standard User 1 4567 Standard User Standard User 10 8765 Standard User 6 items) Image: 1 2 2 2 20	Office Manager 2345 Office Manager 01234 456765 Production Manager 0987 Production Manager 01234 456567 Standard User 1 4567 Standard User 01234 456567 Standard User 1 4567 Standard User 01234 456567 6 items) Image: Comparison of the standard User Image: Comparison of the standard User 01234 456567	Office Manager 2345 Office Manager 01234 456765 Production Manager 0987 Production Manager 01234 456567 Standard User 1 4567 Standard User 01234 456567 Standard User 10 8765 Standard User 01234 456567	Office Manager 2345 Office Manager 01234 456765 Production Manager 0987 Production Manager 01234 456567 Standard User 1 4567 Standard User 0 Standard User 10 8765 Standard User 0	Office Manager 2345 Office Manager 01234 456765 Production Manager 0987 Production Manager 01234 456567 Standard User 1 4567 Standard User 0 Standard User 10 8765 Standard User 0 6 items) Imager 1 2 Imager Page	Office Manager 2345 Office Manager 01234 456765 Production Manager 0987 Production Manager 01234 456567 Standard User 1 4567 Standard User Standard User 10 8765 Standard User 6 items) Imager Imager Imager Imager

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

Traka urname: Administrator isplay Name Override: Iraka Administrator isplay Name: Traka Administrator etails Iraka Administrator aff Number: 1234 aff Number: 1234 bb Role: Administrator el: 01234 123123 bb: 01234 123123 bb: Iraka admin@traka.com te: Iraka admin@traka.com <th>ails System /</th> <th>Access Item Access</th> <th>Region Access</th> <th>Web Access</th> <th>History</th> <th></th>	ails System /	Access Item Access	Region Access	Web Access	History	
Administrator Display Name Override: Display Name: Traka Administrator Octails Administrator Details Administrator 1234 ob Role: Administrator rel: 01234 123123 cax: cax: cax: catiff Number: 1234 ob Role: Administrator rel: 01234 123123 cax: cax: <th>Jser</th> <th></th> <th></th> <th></th> <th></th> <th></th>	Jser					
Nisplay Name Override: Display Name: Traka Administrator Details anguage: System Default Administrator 1234 ob Role: Administrator fel: 01234 123123 cax: 01234 1234 cax: 01234 1234 cax: 01234 1234 cax: 01234	orename:	Traka				
Display Name: Traka Administrator Details anguage: System Default taff Number: 1234 tob Role: Administrator Fel: 01234 123123 Fax: aobile: mail: traka_admin@traka.com Site: Building: Main Office Street, Town: Postcode:	Surname:	Administrator				
Details Language: System Default Staff Number: 1234 lob Role: Administrator Fel: 01234 123123 sax: Admini@traka.com site: Intraka_admin@traka.com site: Street, Town: Postcode: Interface	Display Name Override:					
Anguage: System Default Staff Number: 1234 Job Role: Administrator Fel: 01234 123123 Fax: Interface Aobile: Interface Staff Number: Interface Ballding: Main Office Street, Town: Interface Postcode: Interface	Display Name:	Traka Administrator				
Anguage: System Default Staff Number: 1234 Job Role: Administrator Fel: 01234 123123 Fax: Interface Aobile: Interface Staff Number: Interface Ballding: Main Office Street, Town: Interface Postcode: Interface						
Staff Number: 1234 lob Role: Administrator obb Role: 01234 123123 Fax: Image: Choose File No file chosen Adobile: Image: Choose File No file chosen Email: traka_admin@traka.com Site: Image: Choose File No file chosen Building: Main Office Street, Town: Image: Choose File No file chosen Postcode: Image: Choose File No file chosen						
Index Administrator Fel: 0124 123123 Fax: Index Mobile: Index Email: traka_admin@traka.com Site: Index Building: Main Office Street, Town: Index Postcode: Index	.anguage:	System Default	*			
rel: 01234 123123 Fax: Choose File No file chosen Mobile: traka_admin@traka.com Site: Street, Town: Street	Staff Number:	1234				
Ax: Avbile: Email: Email: Building: Bui	lob Role:	Administrator				
Mobile: Choose File No file chosen Email: traka_admin@traka.com Site:	Tel:	01234 123123				
email: traka_admin@traka.com Site: Building: Main Office Sitreet, Town: Postcode:	Fax:					
Site: Building: Main Office Street, Town: Postcode:	Mobile:					Choose File No file chosen
Building: Main Office Street, Town: Postcode:	Email:	traka_admin@traka	.com			
Street, Town: Postcode:	Site:					
Postcode:	Building:	Main Office				
	Street, Town:					
Notes:	Postcode:					
	Notes:					

- 3. The selected user record will now open. Edit the appropriate details. For more information, please review the <u>User Details</u> section.
- 4. When you are finished, click the Save & 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.

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4.3.5 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 & all previous database back-ups destroyed.

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

1. From the ribbon toolbar, click the Users icon. 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.

			Technical Illustrator		
۲	Alan Fleary	1788	MRD Engineer		07999 866655
۲	Alex Scott	1326	UK Sales	01234 712345	07854 902229
•	Anne Lakeway	9576	Operations Development Manager	01234 712345	07895 07658
۲	Ben Farrar	1233	UK Sales	01234 712345	07990 754347
•	Billy Tabutt		Integration Engineer	01234 712345	

- 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 Delete.

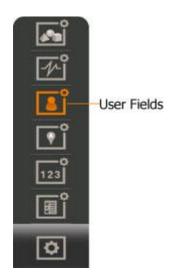
Details	
Please confirm you want	to delete the user
Forename:	Aaron
Surname:	Kennedy
Display Name:	Aaron Kennedy
Staff Number :	1989
Position:	Technical Illustrator
Tel:	01234 712345
Fax:	
Mobile:	
Email:	ak@traka.com
Site:	
Building:	
Street, Town:	
Postcode:	
Notes:	
Delete	

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

4.3.6 USER FIELDS

User Fields are the title headings of the personal credentials in the <u>user details</u> 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 <u>Navigation toolbar</u> and select the User Fields button.



2. The User Fields page will then be displayed.

ails History					
Field 🔶	Description	Mandatory	Duplicate Check	Display Name Order	
User Identification Hea	dings				
Field 01	Forename			1	
Field 02	Surname			2	
User Custom Detail He	adings				
Field 01	Staff Number			Not Included	-
Field 02	Job Role			Not Included	-
Field 03	Tel			Not Included	
Field 04	Fax			Not Included	
Field 05	Mobile			Not Included	-
Field 06	Email			Not Included	-
Field 07	Site			Not Included	
Field 08	Building			Not Included	
Field 09	Street, Town			Not Included	
Field 10	Postcode			Not Included	

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 -2 and surname -1 the Traka Touch will display 'Winner Duncan' instead of the default 'Duncan Winner'.

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', 'Email' and 'Mobile', 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.

Details		
User		
Forename:	Traka	
Surname:	Admin	
Display Name Override:		
Display Name:		
Details		
Language:	System Default 🗸 🗸	
Staff Number:		
Job Role:		User Detail Value Required
Tel:		
Fax:		
Mobile:		User Detail Value Required
Email:		User Detail Value Required
Site:		
Building:		
Street, Town:		

• 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.

• 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 -2 and surname -1 and mobile -3 the Traka Touch will read 'Winner Duncan 07896852148' instead of the default 'Duncan Winner'.

3. Once you have selected the desired options, click the 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.

Details History					
		Field Name		Old Value	New Value
11/04/2013 11:20:08	Modified	Field10	Super Admin		Postcode
11/04/2013 11:20:08	Modified	Field4	Super Admin		Fax
11/04/2013 11:20:08	Modified	Field11	Super Admin		Notes
11/04/2013 11:20:08	Modified	Field8	Super Admin		Building
11/04/2013 11:20:08	Modified	Field1	Super Admin		Staff Number
11/04/2013 11:20:08	Modified	Field3	Super Admin		Telex
11/04/2013 11:20:08	Modified	Field5	Super Admin		Mobile
11/04/2013 11:20:08	Modified	Field2	Super Admin		Position
11/04/2013 11:20:08	Modified	Field9	Super Admin		Street, Town
11/04/2013 11:20:08	Modified	Field7	Super Admin		Site

4.4 ITEMS

4.4.1 ITEM LIST

From the <u>Navigation Toolbar</u>, click the Items icon. 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).

and the second second	10000				2000 2			1
System	Postion -	Dotail 1 😒	Detail 2 📀	Detai 3 🕑	Detail 4	🕑 Decal 5 🕑	Status 😒	Who 🕑
RSID 2 TKC15893	1	Aaron's Cupboard	18050				Out Of System	Aaron Kennedy
R&D 2 TKC15893	2	Aaron's Drawer	306				In System	Simon Dixey
RSID 2 TKC15893	3	Billy's Drawer	556				In System	Simon Dixey
R&D 2 TKC15893	4	Tim B's Drawer	079				In System	Tim Brown
RSID 2 TKC15893	5	Steve's Drawer	032				In System	Steve Hewitson
Downstairs Comidor TKC10001	5			Steve Bumphrey			Out Of System	Hark Williams
R&D 2 TKC15893	6	Mark W's Drawer					In System	Unknown User
R&D 2 TKC15893	7	Mark D's Drawer	598				In System	Mark D
RSID 2 TKC15893	8	Tim D's Drawer	564				In System	Azhar Malik
R&D 2 TKC15893	9	Simon's Drawer	532				In System	Simon Dixey
R5/D 2 TKC15893	10	Azhar's Drawer	372				In System	Duncan Winner
R&D 2 TKC15893	11	Dan's Drawer	554				In System	Unknown User
R&D 2 TKC15893	12	Andrew's Drawer	369				In System	Duncan Winner
R&D 2 TKC15893	13	Jason's Filing Cabinet					In System	Jason O'Connor
R&D 2 TKC15893	18				U5000		In System	Mark Williams
R&D 2 TKC15893	19	R&D Software Cupboard	FM051				In System	Dan Waters
R&D 2 TKC15893	20	R&D Hardware Cupboard	FM106				In System	Mark Williams
1		114000102001		a	1		10	

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 Ribbon Toolbar. To view only items that are from a specific region/system or are of a specific type, you must select the appropriate filter.

4.4.2 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 now be taken to the **New Item** page.

Or:

3. From the Navigation Toolbar, select Items.



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

		Detail 2 🛇				
New System	1			In System		16/01/2019 10:48:51
New System	2			In System		16/01/2019 10:48:51
New System	3			In System		16/01/2019 10:48:52
New System	4			In System		16/01/2019 10:48:52

4. From the Ribbon Toolbar, click on the Add



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.

<u>Details</u>

Type Here you can assign the <u>Item Type</u> 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 <u>Adding New Item</u> <u>Types</u> or <u>Editing an Item Type</u> for further details. Or alternately you can edit the selected item type by selecting the 'Edit item' button from the ribbon toolbar under tools.

H P 2 I M	
etails	
Fob	
Home System:	
Home Position:	
Current System:	
Current Position:	
Tag No.:	
Fob Description:	
Attach iFob Detac	ch iFob
Details	
Гуре:	Key
Area:	
Location:	
Manager:	
Key Number:	
Owner:	
Section:	
Reference:	
Location:	
Туре:	
Acquired Date:	

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.

Cur	tomise	Export	Free iFobs Only
System 🔶 😒	Pos. 🔷	Description 📀	Status
New System	7		In System
New System	8		In System
New System	9		In System
New System	10		In System
Page 1 of 1 (4 i	tems) 🔇	30100	
Treate Filter			

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.

lome System:		New System	
lome Position:		8	
Current System:		New System	
Current Position:		8	
ag No.:		0	
Fob Description:		-	
Attach iFob	Detach iFob		

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

System 🔸 🖂	Pos. 🔶	Detail 1 🕑	Detail 2 🕑	Detail 3 🕑	Detail 4 🕑	Detail 5 🖂	Status 🕑	Who 🕑	When
lew System	1						In System		16/01/2019 10:48:51
lew System	2						In System		16/01/2019 10:48:51
lew System	3						In System		16/01/2019 10:48:52
lew System	4						In System		16/01/2019 10:48:52
New System	5						In System		16/01/2019 10:48:52

The process can be repeated to add more new items.

4.4.3 EDITING AN ITEM

- From the system viewer, highlight an iFob or locker compartment with an item defined and then select the
 Edit Items button from the <u>ribbon toolbar</u>. Alternatively, using the <u>navigation toolbar</u> at the bottom of the
 screen, click the Item button. From the item list, highlight the desired item and click the Edit button from the
 ribbon 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.

but Reception onme Position: 1 urrent System: Reception urrent System: Reception ag No.: 0 ob Description: - Attach #fob Detach #fob vereats - scation: - anager: - eton: -	tails Featur	es Access Schedules History	
me System:: Reception ome System:: Reception ome System:: Reception urrent System:: Reception urrent System:: I ag No.: 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0			
me Position: 1 urrent System: Reception ag No.: 1 ag No.: 0 ob Description: - Attach #ob Detach #ob cetas - reas - agager: -			
Reception ag No.: 0 ag No.: 0 ob Description: 0 Attach if ob Detach if ob read: 0 agto: 0 agto: 0 bescription: 0 catch if ob Detach if ob		Reception	
urrent Position: 1 ag No.: 0 ob Description: 0 Attach if-bo Detach if-bo bottach if-bo Detach if-bo ctach Generation ctach Image: Imag		1	
a a g g ob Description: a Attach iffob Detach iffob vpe: Key catobility: a anager: a edion: a edion: <td< td=""><td></td><td>Reception</td><td></td></td<>		Reception	
Attach If-ob Detach If-ob etaks vppe: anager:		1	
Attach iFob Detach iFob etals ype: Key rea: Key cation: Index anager: Index ey Number: Index ey Number: Index efference: Index efference: Index ozotion: Index efference: Index ozotion: Index	ag No.:	0	
Key rea: Key cation: Image: I	Fob Description:		
Key rea: Key scation: Image: anager: Image: py Number: Image: ection: Image: could be: Image:	Attach iFob Detac	n iFob	
Key rea: Key scation: Image: anager: Image: py Number: Image: ection: Image: could be: Image:			
xxy xxy xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx			
bocation: Image: Imag	ype:	Кеу	
anager: anager	rea:		
ay Number: wmer: bechon: eference: cation: ppe: cquired Date:	ocation:		
wmer: Image: Compare the section of	Manager:		
ection: eference: eference	ey Number:		
eference: bocation: ype: cquired Date:)wner:		
ype: cquired Date:	ection:		
ype: cquired Date:	leference:		
cquired Date:	ocation:		
	occurr.		
otes:	ype:		
	ype:		
	ype: Icquired Date:		
	ype: Icquired Date:		C

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

lame:	Кеу			
Details Field	Description 😔	Mandatory 📀	Duplicate Check 📀	Fob Description Order
Field 01	Area			Not Included
Field 02	Location			Not Included
Field 03	Manager			Not Included
Field 04	Key Number			Not Included
Field 05	Owner			Not Included
Field 06	Section			Not Included
Field 07	Reference			Not Included
Field 08	Location			Not Included
Field 09	Туре			Not Included
Field 10	Acquired Date]		Not Included
Field 11	Notes			Not Included
Page 1 of 1 (11 iter Create Filter	ns) 🔇 🔇 1 🔊 🔊		Page size:	20

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**. 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.

Edit					
Details Featu	res Items	iFob Access	History	- Citer	
System					
System:	New System				
Position:	1				
Current Position:	1				
Status:	In System				
Serial Number:	E1CB0C070000				
Details					
Manual Description:	\checkmark				
Description:	Red Ford Focus				^
System Access					
Tag No:	0				
Authorisers:	0	\checkmark			
			¢		

4. 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.

History					
	- 0				
Date	Action	Field Name	User	Old Value	New Value
16/04/2013 16:57:27	Modified	Detail02	Super Admin	area 2	1
16/04/2013 16:57:27	Modified	Detail01	Super Admin	area 1	area
6/04/2013 16:24:37	Modified	Detail07	Super Admin	ref	
16/04/2013 16:20:16	Modified	Detail09	Super Admin		key type
16/04/2013 16:20:16	Modified	Detail08	Super Admin		location 1
16/04/2013 16:20:16	Modified	Detail07	Super Admin		ref
16/04/2013 16:20:16	Modified	Detail02	Super Admin		area 2
16/04/2013 16:20:16	Modified	Detail05	Super Admin		owner
6/04/2013 16:20:16	Modified	Detail03	Super Admin		manager
6/04/2013 16:20:16	Modified	Detail04	Super Admin		key number

5. When you have completed editing the item, click the Save button or click **Save & 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.

New Item		
Edit Too		
Details		
System		
Region:	Default	V
System:	New System	~
Free iFobs Only:		
Position:	0001 (Red Ford Focus)	~
Details		
Туре:	Key	$\mathbf{\sim}$
Area:		
Location:		
Manager:		

4.4.4 DELETING AN ITEM

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

liens.	ð	Customis		Eport	Region	System		Туре
System	\odot	Position	Item Detail 1 😔	ntem Detail 2 😔	Item Detail 3 😔	Item Detail 4 😔	Item Detail 5 오	Status
Ground Floor		1	Aston Martin				John Kent	In System
Sround Floor		1	Building Key		Duncan Winner	896523	Duncan Winner	In System
Found Floor		2	Motorola					In System
Sround Floor		2	Research & Development		Duncan Winner	G8A30220		In System

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

9	Delete Item
Details	
Please	confirm you want to delete the item
Descrip	ition:
Key Nu	mber :
1	
4	
3	
(33)	
245	

3. Once deleted, the item will no longer be in the items list.

4.4.5 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: It is possible to add up to 5 Items to a single iFob and they must all be of the same item type.

- 1. From the system viewer, highlight a position that currently does not have an item assigned. Then using the Ribbon 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.

H P 2 I M		
Details		
iFob		
Home System:	Reception	
Home Position:	1	
Current System:	Reception	
Current Position:	1	
Tag No:	0	
iFob Description:		
Details Type:	Key 🗸	
	Key 🗸	
Туре:	Key V	
Type: Area:	Key V	
Type: Area: Location:	Key V	
Type: Area: Location: Manager:	Key V	
Type: Area: Location: Manager: Key Number:	Key V	
Type: Area: Location: Manager: Key Number: Owner:	Key V	
Type: Area: Location: Manager: Key Number: Owner: Section:	Key V	
Type: Area: Location: Manager: Key Number: Owner: Section: Reference:	Key V	
Type: Area: Location: Manager: Key Number: Owner: Section: Reference: Location:	Key ~	

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 ribbon toolbar, it is possible to view **All iFobs** or **Free iFobs Only**.

Reception Reception	2	In System		
	-			
	3	In System		
Reception	4	In System		
Reception	5	In System		
Reception	б	In System		
Reception	7	In System		
Reception	8	In System		
Reception	9	In System		
Reception	10	In System		
Page 1 of 1 (14 item	6) 00100		Page sze:	20 🔤
Create Filter				
	Cancel			

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

Reception	1	In System		
Reception	2	In System		
Reception	3	In System		
Reception	4	In System		
Reception	5	In System		
Reception	6	In System		
Reception	7	In System		
Reception	8	In System		
Reception	9	In System		
Reception	10	In System		
Page 1 of 1 (15	tems) 🔞 🕲 🔟 🔕 🌘	»	Page size:	20
Create Filter				
· second read				
Ok	Cancel			
UK.	Calleer			

- 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.

•••••••••••••••••••••••••••••••••••••••
Reception
Status: 🔘 06/09/2021 12:10:05
System communicating OK
A-1
Status: 🔾
Previous user: Traka Admin

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 & 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.

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4.4.6 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 more information on Software Item Access Restrictions, refer to the <u>Software Permissions</u> <u>Groups</u> section.

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

1. Select the Item Access page via the navigation toolbar. The Item Access Group list will then be displayed.

Accounts	
All Access - Directors	
Geaning Cupboard	
Customer Filing Cupboard	
First Aid Cupboard	
Fleet Vehicle Keys	
R	
Key Test Group	
Marketing	
MRD	
Unit 4	
Vending Machine Stock	

- 2. Click the Add button.
- 3. You will then be prompted to enter a group name.

HP2 Edit		
Name:		

4. Click the Save button to enable the Region, Item Access, Users & 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 <u>regions</u> you wish to apply to the group.

etails Regior	Item Access Users History
Grant All	Revoke All
Access 📀	Region
~	Default
	Region 1
	Region 2
	Region 3
Dage 1 of 1 (4)	tems) 🔍 🔇 🔟 🔊 🔊

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.

NOTE: For more information on using the context menu, please refer to the <u>Item Access</u> section within Multi-Select/Multi-Edit.

Edit		Customise	Ex	port										
0	Access 📀	System 🔺 😔	Pos Tag No	Detail 1	\odot	Detail 2	\odot	Detail 3	\odot	Detail 4	\odot	Detail 5	\odot	Ту
	Select All	on Page												Ke
	Deselect /	All On Page		1										Ke
	Deselect /													Ke
		Add Selected Item(s) to group Remove Selected Item(s) from group												Ke
	Grant All													Ke
<u> </u>	Revoke Al			_										Ke
	1	System	6											Ke
	1	Home System	7											Ke
	1	Home System	8											Ke
	1	Home	9											Ke

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

Edit tails Region	n It	Custo custo	mise Histo	Export ry									
2 8	ync I	Member 🕑	Display Name	\odot	Staff Number 🕑	Job Role	\odot	Tel	\odot	Fax	\odot	Mobie	\odot
✓ 4		Select Al	on Page			1							
		Deselect Deselect	All On Page All										
		Add All Fi	itered Users to Item	Access Grou	ip								
< Remove AI Fitered Users from Item Access Group Add Selected Users to Item Access Group							Page	size:		20			
Treate Filter		Remove	Selected Users from										

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NOTE: For more information on adding users to Item Access Groups using the context menu, please refer to the <u>Item Access</u> section within Multi Select/Multi Edit.

8. Once you have finished, click the **Save and Return** button or select the History tab. The history will show you a record of when the group was added, who by, what the name is and if it has been changed.

s Region It	em Access Users	History				
/hen	Action 📀	Field	Who	Old	New	
2/05/2021 12:18:19	Modified	Name	Super Admin	Group 1	Warehouse Storage	
age 1 of 1 (1 items)	@010@				Page size:	20

4.4.7 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 Toolbar and from there, click the Item Types button.



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.

Accounts	
Board Room	
Cleaning Keys	
Company Safe	
Customer Profiles	
Directors Suite	
First Aid Cupboard	
Fleet Vehicles	
HR Office	
International Office	
Key	
Marketing Stock	
Mezannine Cage	
MHE Keys	
Training Room	
Uniform Stock	
Unit 4	
Vending Machine Stock	
Warehouse Storage	
Page 1 of 1 (19 items) 🛛 🕢 👔 🕗 💬	Page size; 20 🗧
© Create Filter	

Please follow the links below for more information on adding, editing, deleting, searching & exporting.

4.4.7.1 ADDING NEW ITEM TYPES

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

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 type 'Key'. To add another type, click the Add button.

Accounts	
Board Room	
Cleaning Keys	
Company Safe	
Customer Profiles	
Directors Suite	
First Aid Cupboard	
Fleet Vehicles	
HR Office	
International Office	
Key	
Marketing Stock	
Mezannine Cage	
MHE Keys	
Training Room	
Uniform Stock	
Unit 4	
Vending Machine Stock	
Warehouse Storage	
Page 1 of 1 (19 items) 🛛 😨 👔 😨 💬	Page size: 20 🧧
© Create Filter	

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

HPZ		
Туре		
Name:	Security Door Key	

3. 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.

lame:	Security Door Key					
vetails						
Field •	Description	0	Mandatory 📀	Duplicate Check 📀	Fob Description Order	0
Field 01	Key Number		V	V	Not Included	
Field 02	Owner		V		Not Included	E
Field 03	Make				Not Included	
Field 04	Section				Not Included	E
Field 05	Location				Not Included	
Field 06					Not Included	E
Field 07					Not Included	E
Field 08					Not Included	
Field 09					Not Included	
Field 10					Not Included	
Field 11					Not Included	
4						

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 for 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.

4. Once you have selected the desired options, click the Save & 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.

<u>History Tab</u> 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.

e Histo		port.			
Histo	9 <u> </u>				
Date -	Action	Field Name	User	Old Value	New Value
07/11/2014 10:56:58	Modified	Field 5	Super Admin		Location
07/11/2014 10:56:52	Modified	Field 4	Super Admin		Section
07/11/2014 10:56:17	Modified	Field 3	Super Admin		Make
07/11/2014 10:52:31	Modified	Field 2	Super Admin		Owner
07/11/2014 10:52:17	Modified	Field 1	Super Admin		Key Number
Page 1 of 1 (5 items)	00100			Page size:	20

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

4.4.7.2 EDITING ITEM TYPES

1. Select Software Settings from the <u>Navigation Toolbar</u> 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.

Accounts	
Board Room	
Cleaning Keys	
Company Safe	
Customer Profiles	
Directors Suite	
First Aid Cupboard	
Fleet Vehicles	
HR Office	
International Office	
Key	
Marketing Stock	
Mezannine Cage	
MHE Keys	
Training Room	
Uniform Stock	
Unit 4	
Vending Machine Stock	
Warehouse Storage	
Page 1 of 1 (19 items) 💿 🔇 🗓 😒 💬	Page stre: 20
Create Filter	Manual

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.

	story				
ime:	Security Door Key				
etaks					
feld -	Description	Mandatory 📀	Duplicate Check 📀	Fab Description Order	0
Field 01	Key Number		V	Not Included	
Field 02	Owner			Not Included	
Field 03	Make			Not Included	
Field 04	Section			Not Included	
Field 05	Location			Not Included	
Field 06				Not Included	
Field 07				Not Included	
Field 08				Not Included	
Field 09	0.			Not Included	
Field 10				Not Included	
Field 11				Not Included	

4.5 REPORTS

4.5.1 REPORTS OVERVIEW

Reports are a compilation of information or activities that have occurred at the system. There are eight 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.

General Reports

Status Reports

Exceptions Reports

Permissions Reports

Reason Reports

Regions Reports

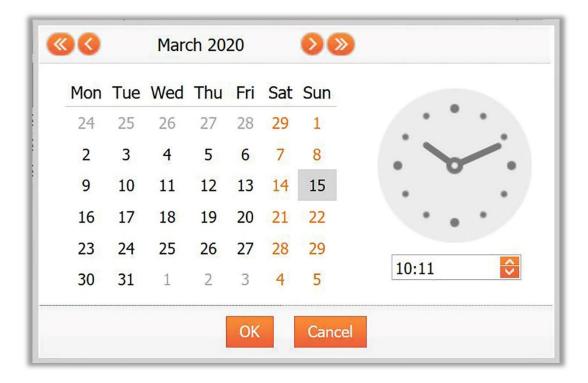
Utilisation Reports

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.

NOTE: Before submitting a report, ensure that the required language has been specified otherwise the report may not display correctly due to different date formats i.e., DD/MM/YYYY or MM/DD/YYYY.

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.



4.5.2 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 60000 records.

- 1. Click the banner named **General** to expand the General category.
- 2. To view the Activity Report, click on the banner and select View This Report.

Activity Report	
View This Pepert	
view mis Report	
This report shows all system, iFob and item activity.	

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

							ASSA ABLO
	ity Report will only return a maximum lect the filter parameters below:	of 60000 records					
Step 1: Se	elect Date Range						
	09/03/2020 00:00:00	Date To:	09/04/2020 23:59:59		Duration:	32 days	
	Second contract to an end of the second contract of the second contr					No. of the second se	
Step 2: So	elect Activity						
Activity Cat				Activity:*			
Step 3: Se	alect Specific Record 🗹 Enable S	Section					
	elect Specific Record 🗹 Enable S r Specific Record Selection	Section					
		Section		System:			
Prefilte Regions:	r Specific Record Selection			System:			
Prefilte Regions:	r Specific Record Selection			System:			
Prefilte Regions:	r Specific Record Selection			System:			
Prefilte Regions:	r Specific Record Selection			System:			5
Prefilte Regions:	r Specific Record Selection			System:		Activity	
Prefilte Regions:	r Specific Record Selection Default			System:		Activity	
Prefilte Regions: User: iFob: Item:	r Specific Record Selection Default			System:		Activity Records	0
Prefilte Regions: User: iFob: Item:	r Specific Record Selection Default			System:			0

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

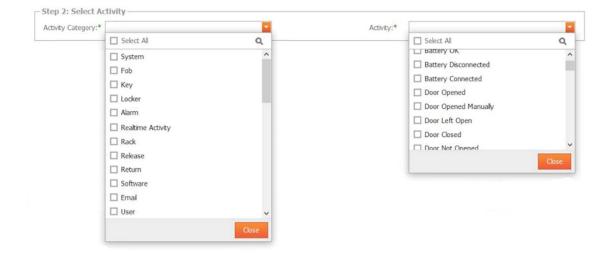
Step 1: Select Date Range

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.

TTOIL.	09/03/202	0.00:	00:00	-		_	_	Date To	· .	09/04/202	0 23.	33.33	-				Dun	ation:	32	days	
	00		Marc	h 202	20		00					1									
	Mon	Tue	Wed	Thu	Fri	Sat	Sun														
	24	25	26	27	28	29	1	- /.	*	i * .											
	2	3	4	5	6	7	8														
	9	10	11	12	13	14	15			•											
	16	17	18	19	20	21	22		•												
	23	24	25	26	27	28	29	00	0:00												
	30	31	1	2	3	4	5	00	.00												
												÷.,									
n 1+ Se	aloct Date	o Dar	000-																		
	elect Date							Date To	»:	09/04/20	20 23:	59:59					Dur	ation:	32	2 days	
								Date To):	09/04/20			II 202	0		00	Dur	ation:	32	? days	
]			Date To);	CO CO	Tue		il 202 Thu	Fri	Sat	Sun	Dur	ation:	32	? days	
]			Date To):	00		Apr	il 202 Thu 2	Fri 3	Sat 4	Sun 5	Dur	ation:	32	? days	
					[Date To):	- 🔇 🔇 Mon 30 6	Tue 31 7	Apr Wed 1 8	il 202 Thu 2 9	Fri 3 10	Sat 4 11	Sun 5 12	Dur.	ation:	32	2 days	
					[Date To		Mon 30 6 13	Tue 31 7 14	Apr Wed 1 8 15	il 202 Thu 2 9 16	Fri 3 10 17	Sat 4 11 18	Sun 5 12 19	Dur	ation:	32	2 days	
]			Date To	2:	Mon 30 6 13 20	Tue 31 7 14 21	Apr Wed 1 8 15 22	Il 202 Thu 2 9 16 23	Fri 3 10 17	Sat 4 11 18 25	Sun 5 12 19 26	Dur	ation:	32	2 days	
					[Date To);	Mon 30 6 13 20 27	Tue 31 7 14 21 28	Apr Wed 1 8 15 22 29	il 202 Thu 2 9 16 23 30	Fri 3 10 17 24 1	Sat 4 11 18 25 2	Sun 5 12 19 26 3	•••••	ation:	••••		
]			Date To		Mon 30 6 13 20	Tue 31 7 14 21	Apr Wed 1 8 15 22	Il 202 Thu 2 9 16 23	Fri 3 10 17 24	Sat 4 11 18 25	Sun 5 12 19 26	Dur * * * 23:59	ation:	32		

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 Selection** checkbox as shown below.

	elect Specific Record 🛛		
Regions:	Default	System:	
User:			
Fob:			
🗌 Item:			

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.

Please si	vity Report will only return a maximum elect the filter parameters below:	of 60000 records					
ep 1: 5	ielect Date Range						
ate From	09/03/2020 00:00:00	Date To:	09/04/2020 23:59:59 🗧		Duration:	32 days	
	elect Specific Record C Enable	Section					
	Default			System:	New System		
egions:							
egions:							

- 1. From the drop-down menus, select the required Region and System.
- 2. Select the User drop down and select from the list of users.

egions:	Default	System:	New System	
✔ User:				
Fob:	Manager			
Item:	Super Admin			
	Traka Admin			

3. Depending on the system type, select from the drop-down menus for either iFob or Item.

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

Submit	Activity Records
--------	---------------------

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

Date From: 14/03/ Activity Category: << Edit Filter Select	Fob		To: 14/04/2020 ity: Item Removed		Who: Traka Admin	iFob: New System 9
When •	System 📀	Pos.	Description	\odot	Activity 🔗	Who 🛇
When •	System 👽	Pos. 9	Description	\odot	Activity	Who Traka Admin

This Document is uncontrolled when printed unless over stamped "CONTROLLED DOCUMENT"

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 1000 records.

- 1. Click the banner named **General** to expand the General category.
- 2. To view the Central History Report, click on the banner and select View This Report.

ne	ral de la construcción de la constru
	Activity Report
	Central History Report
	View This Report
	A report showing changes that have been made to records and settings within Traka Web, such as user record, item records etc.

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

	Object:*		
Enable Section	System:		
		System:	System:

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

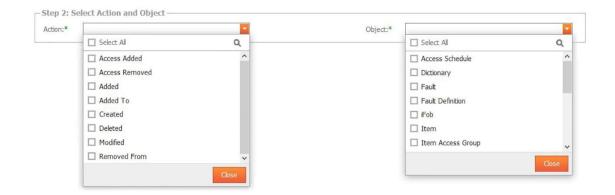
Step 1: Select Date Range

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.

riom.	09/03/202	20 00:	00:00	-	_	_	_	Date To:	09/	/04/2020) 23:5	9:59	-				Dura	stion:	32 da	ays	
	00		Marc	ch 20	20		00					-									
	Mon	Tue	Wed	Thu	Fri	Sat	Sun														
	24	25	26	27	28	29	1		1 i	۰.											
	2	3	4	5	6	7	8		6												
	9	10	11	12		14	15														
	16	17	18	19	20	21	22		••	•											
	23 30	24 31	25	26	3	28	29	00	:00	0	1										
	30	31	1	2	3	4	2														
					OK		Cano	el													
	elect Date				1			Date To	. 52)/04/202	0 23*	59-59					Dur	ation:	32 da	avs	
	elect Date							Date To)/04/202 © ()	0 23:		1 202	0		00	Dur	ation:	32 da	ays	
								Date To		80							Dur	ation:	32 dz	ays	
								Date To		80		Apr					Dur	ation:	32 dz	ays	
					ļ			Date To		Mon	Tue	Apr Wed	Thu	Fri 3	Sat	Sun	Dur	ation:	32 da	ays	
								Date To		Mon 30	Tue 31	Apr Wed	Thu 2	Fri 3	Sat 4	Sun 5	Dur	ation:	32 dz	ays	
]			Date To		Mon 30 6 13 20	Tue 31 7 14 21	Apr Wed 1 8 15 22	Thu 2 9 16 23	Fri 3 10 17	Sat 4 11	Sun 5 12 19 26	Dura	ation:	32 da	ays	
								Date To		Mon 30 6 13 20 27	Tue 31 7 14 21 28	Apr Wed 1 8 15 22 29	Thu 2 9 16 23 30	Fri 3 10 17 24 1	Sat 4 11 18 25 2	Sun 5 12 19 26 3	•••••	ation:		ays	
				5				Date To		Mon 30 6 13 20	Tue 31 7 14 21	Apr Wed 1 8 15 22	Thu 2 9 16 23	Fri 3 10 17	Sat 4 11 18 25	Sun 5 12 19 26	Dur * * * 23:59	ation:	32 dz	ays	

Step 2: Select Action and Object

The **Select Action and Object** section comprises of 2 drop-down menus. From the **Action** menu, you can select from a list of different categories. These can be either selected individually or all at once. From the **Object** menu, you can select from a list of different categories in relation to the selected actions. These also can be selected individually or all at once.



Step 3: Select Specific Record

Prenite	er Specific Record Selection	
Regions:	Default	System:
Who M	ade the Change	
U Who:		
Specifi	c Record Changed	
User:		
Fob:		
Item:		

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.

	lect Date Range	Date To: 20	/04/2020 23:59:59			Duration:	32 days	
Date 110111.	20/03/2020 00:00:00	Date 10. 20	/04/2020 23.39.39			Durduuri.	32 ddys	
Step 2: Se	lect Action and Object							
Action:*	Created; Modified	•		Object:*	User			-
Step 3: Se	elect Specific Record 🗆 Enable	Section						
	ect Specific Record C Enable	Section						
		Section		System:				
Prefilte Regions:	r Specific Record Selection	Section		System:				V
Prefilte Regions:	r Specific Record Selection	Section		System:				
Prefilte Regions: Who Ma	r Specific Record Selection	Section 🔹		System:				
Prefilte Regions: Who Ma	r Specific Record Selection Default Ide the Change	Section		System:				
Prefilter Regions: Who Ma Who: Specific	r Specific Record Selection Default Ide the Change	Section		System:				

- 1. From the drop down menus, select the required Region and System.
- 2. To specify who made the change, select the checkbox and then click on the **Who** drop down and select from the list of users.

ions:	Default		System:
o Ma	ade the Change		
10:			
cific	Manager	^	
	Super Admin		
ser:	Traka Admin		
b:	Traka User 1		
n:	Traka User 2		
	Traka User 3		
_	Traka User 4	~	

3. Select the User drop down and select from the list of users.

Regions:	Default	•	System:
Who M	lade the Change		
Who:			
Specifi	c Record Changed		
User:			
Fob:	Manager	^	
□ Item:	Super Admin		
-	Traka Admin		
	Traka User 1		
	Traka User 2		
	Traka User 3		
	Traka User 4		

4. Depending on the system type, select from the drop down menus for either iFob or Item.

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.

Central H	istory Rep	port					traka ASSA ABLOY
Customise	Expo	ort					
			Filte	er summary:			
Date From: 20/03/		Date To: 20/	04/2020 23:59	User Edited: Action: Created, I	Modified Who	ect: User	
When	Object	Record	Action	Field	Who	Old	New
20/04/2020 14:34:37	User	Traka User 7	Modified	Keypad ID	Super Admin	*******	*******

20/04/2020 14:34:37	User	Traka User 7	Modified	Active	Super Admin	False	True
	User User	Traka User 7 Traka User 6	Modified Modified			False	
20/04/2020 14:33:36				Active	Super Admin		True
20/04/2020 14:33:36 20/04/2020 14:33:36	User	Traka User 6	Modified	Active Keypad ID	Super Admin Super Admin	******	True *******
20/04/2020 14:33:36 20/04/2020 14:33:36 20/04/2020 14:32:34	User User	Traka User 6 Traka User 6	Modified Modified	Active Keypad ID Active	Super Admin Super Admin Super Admin	******* False	True ******** True
20/04/2020 14:33:36 20/04/2020 14:33:36 20/04/2020 14:32:34 20/04/2020 14:32:34	User User User	Traka User 6 Traka User 6 Traka User 5	Modified Modified Modified	Active Keypad ID Active Keypad ID	Super Admin Super Admin Super Admin Super Admin	******* False *******	True ******** True ********
20/04/2020 14:33:36 20/04/2020 14:33:36 20/04/2020 14:32:34 20/04/2020 14:32:34 20/04/2020 14:31:41	User User User User	Traka User 6 Traka User 6 Traka User 5 Traka User 5	Modified Modified Modified	Active Keypad ID Active Keypad ID Active	Super Admin Super Admin Super Admin Super Admin Super Admin	******** False ******** False	True ******** True ******** True True True
20/04/2020 14:34:37 20/04/2020 14:33:36 20/04/2020 14:33:36 20/04/2020 14:32:34 20/04/2020 14:32:34 20/04/2020 14:31:41 20/04/2020 14:31:41 09/04/2020 11:27:59	User User User User User User	Traka User 6 Traka User 6 Traka User 5 Traka User 5 Traka User 4	Modified Modified Modified Modified	Active Keypad ID Active Keypad ID Active Keypad ID	Super Admin Super Admin Super Admin Super Admin Super Admin Super Admin	******** False ******** False ********	True ******** True ******** True ********

4.5.3 STATUS REPORTS

The Status Report comprises of 2 report categories:

- Current Item Status Report
- Curfew Status Report

Current Item Status Report

This report shows all items and their system status, e.g. whether or not it is in the system.

- 1. Click the banner named Status to expand the Status category.
- 2. Click **Current Item Status Report** to expand the information drop-down box, which will contain a brief description of the report.

e.	General
	Status
1	Current Item Status Report
	View This Report
	A report showing items and if they are in or out of a system.
	Curlew Status Report
	Exceptions
•	Permissions
	Regions
	Utilisation
	Diagnostics

- 3. Select 'View This Report'.
- 4. The report will automatically generate.
- 5. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon toolbar.

Curfew Status Report

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

- 1. Click the banner named Status to expand the Status category.
- 2. Click **Curfew Status Report** to expand the information drop-down box, which will contain a brief description of the report.

- 3. Select 'View This Report'.
- 4. The report will automatically generate.
- 5. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon toolbar.

4.5.4 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

Alarms Report

This report shows any alarms that have been triggered.

- 1. Click the banner named Exceptions to expand the Exceptions category.
- 2. Click **Alarms Report** to expand the information drop-down box, which will contain a brief description of the report.

	General
•	Status
C	Exceptions
	Alarms Report
	View This Report
	A report showing alarms.
	Attempted System Access Exception Report
	Item Returned by a Different User Report
	Not Seen In A While Report
	Overdue Report
•	Permissions
	Regions
•	Utilisation
	Diagnostics

- 3. Select 'View This Report'.
- 4. 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 <u>Reports Overview</u> for further details.
- 5. After selecting the date and time the report will automatically generate.
- 6. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon toolbar.

Attempted System Access Exception Report

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

- 1. Click the banner named Exceptions to expand the Exceptions category.
- 2. Click **Attempted System Access Exception Report** to expand the information drop-down box, which will contain a brief description of the report.

General	
 Status 	
Exceptions	
Alarms Report	
Attempted System Access Exception Report	
View This Report	
A report showing attempts to access a system with an unknown Card ID, Keypad ID, Biometric or Enrolment ID or PIN. Where an unknown Card ID has been used, the Card ID will be displayed in this report.	
Item Returned by a Different User Report	
Not Seen In A While Report	
Overdue Report	
Permissions	
Regions	
Utilisation	
Diagnostics	

- 3. Select 'View This Report'.
- 4. 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 <u>Reports Overview</u> for further details.
- 5. After selecting the date and time the report will automatically generate.
- 6. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon 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 banner named Exceptions to expand the Exceptions category.
- 2. Click **Item Returned by a Different User Report** to expand the information drop-down box, which will contain a brief description of the report.

> General
> Status
Exceptions
Alarms Report
Attempted System Access Exception Report
Item Returned by a Different User Report
View This Report
A report showing items that were taken and returned by different users.
Not Seen In A While Report
Overdue Report
Permissions
Regions
> Utilisation
Diagnostics

- 3. Select 'View This Report'.
- 4. 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 <u>Reports Overview</u> for further details.
- 5. After selecting the date and time the report will automatically generate.
- 6. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon 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 banner named Exceptions to expand the Exceptions category.
- 2. Click **Not Seen in a While Report** to expand the information drop-down box, which will contain a Userdetermined time scaled description of the report.

> General
> Status
- Exceptions
Alarms Report
Attempted System Access Exception Report
Item Returned by a Different User Report
Not Seen In A While Report
View This Report
A report showing iFobs and items that have not been back to the system for a long time (e.g. lost items).
Overdue Report
Permissions
> Regions
Utilisation
Diagnostics

- 3. Select 'View This Report'.
- 4. The report will automatically generate. The default duration is set to 30 days but can be adjusted by selecting the chevrons.

Not Seen In A While Report	
Customise	⊙ 30 ⊙ Days Duration

5. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon toolbar.

Overdue Report

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

- 1. Click the banner named Exceptions to expand the Exceptions category.
- 2. Click **Overdue Report** to expand the information drop-down box, which will contain a brief description of the report.



- 3. Select 'View This Report'.
- 4. The report will automatically generate.
- 5. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon toolbar.

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

4.5.5 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 banner named Permissions to expand the Permissions category.
- 2. Click **Item Access by Item Report** to expand the information drop-down box, which will contain a brief description of the report.

	General
	Status
(+	Exceptions
	Permissions
	Item Access By Item Report
	View This Report
	A report showing a list of items and under each item, who has access to that items.
	Item Access By User Report
	Web Access By Group Report
	Web Access By User Report
•	Regions
1	Utilisation
	Diagnostics

- 3. Select 'View This Report'.
- 4. The report will automatically generate.
- 5. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon 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 banner named Permissions to expand the Permissions category.
- 2. Click **Item Access by user Report** to expand the information drop-down box, which will contain a brief description of the report.

*	General
	Status
	Exceptions
	Permissions
	Item Access By Item Report
	Item Access By User Report
	View This Report
	A report showing a list of users and under each user, what items they have access to.
	Web Access By Group Report
	Web Access By User Report
	Regions
	Utilisation
	Diagnostica

- 3. Select 'View This Report'.
- 4. The report will automatically generate.
- 5. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon toolbar.

Item Access by Item Access Group Report

This report shows a list of Item Access Groups and the item access associated with them.

- 1. Click the banner named Permissions to expand the Permissions category.
- 2. Click **Item Access by Item Access Group Report** to expand the information drop-down box, which will contain a brief description of the report.

▶ General
 Status
Exceptions
Permissions
Item Access By Item Report
Item Access By User Report
Them Access By Item Access Group Report
View This Report
A List of Item Access Groups and under each Item Access Group, details of each item the Item Access Group provides access to.
Web Access By Group Report
Web Access By User Report
▶ Regions
▶ Utilisation
Diagnostics

- 3. Select 'View This Report'.
- 4. The report will automatically generate.
- 5. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon toolbar.

Web Access by Group Report

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

- 1. Click the banner named Permissions to expand the Permissions category.
- 2. Click **Web Access by Group Report** to expand the information drop-down box, which will contain a brief description of the report.

a .	General
	Status
	Exceptions
	Permissions
(Web Access By Group Report
	View This Report
	A report showing a list of web access groups and under each group, who has access to that group.
	Web Access By User Report
	Regions
•	Utilisation
	Dugnostics

- 3. Select 'View This Report'.
- 4. The report will automatically generate.
- 5. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon 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 banner named Permissions to expand the Permissions category.
- 2. Click **Web Access by User Report** to expand the information drop-down box, which will contain a brief description of the report.

	General
	Status
	Exceptions
	Permissions
(Web Access By Group Report
	Web Access By User Report
	View This Report
	A report showing a list of users and which web access group they are a member of
	Regions
	Utilisation
	Diagnostics

- 3. Select 'View This Report'.
- 4. The report will automatically generate.
- 5. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon toolbar.

4.5.6 REASON REPORTS

Reason Logging is a cost option feature that allows a user to log the 'reason' they are removing/returning the item at the system. You can run specific reports of which reasons are most commonly used and which items they are used on.

Reasons Report

Running this report will show what 'reason' was logged against which item and the user who removed/returned the item, the date & time, system etc.

- 1. Click the banner named Reasons to expand the Reasons category.
- 2. Click **Reasons Report** to expand the information drop-down box, which will contain a brief description of the report.

•	General
	Status
•	Exceptions
•	Permissions
•	Regions
	Reasons
	- Reasons Report
	View This Report
	A report showing all reasons given when an item was released or returned.
	Reasons On Release Chart
	Reasons On Return Chart
•	Utilisation
•	Diagnostics

3. Select 'View This Report'.

Custormie	Eiport		Start Date			E	nd Date		
Whan	System 📀	Position	Fob Description 📀	Activity	2	Reason	\odot	Who	
29/08/2014 11:35:32	TKC22120	1		Return		Lock Broken		Aaron Kenne	xty
29/08/2014 11:35:17	TKC22120	1		Release		Lod: Broken		Aaron Kenne	dy
29/08/2014 09:33:34	TKC22120	1		Release		Lod: Broken		Aaron Kenne	xdy
29/08/2014 09:27:55	TKC22120	1		Return		Lod; Broken		Aaron Kenne	sdy
29/08/2014 09:27:07	TKC22120	1		Release		Lock Broken		Aaron Kenne	xdy
22/08/2014 11:38:00	TKC22120	1		Release		Lod: Broken		Aaron Kenne	xdy
0									

4. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon toolbar.

Reasons on Release Chart

This report will graphically display the reason items are removed from the system. This is clearly represented by a pie chart diagram, which shows the most common uses of the items and the reasons that are logged against them when they are removed.

- 1. Click the banner named Reasons to expand the Reasons category.
- 2. Click **Reasons On Release Chart** to expand the information drop-down box which will contain a brief description of the report.

•	General
	Status
	Exceptions
	Permissions
	Regions
	Reasons
	Reasons Report
	Reasons On Release Chart
	View This Chart
	A chart and report 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.
	Reasons On Return Chart
	Utilisation
	Diagnostics

3. Select 'View This Report'.

You can filter this report by start date, end date, regions, type (item types) and items from the ribbon toolbar.

O1/06/2014 09:20 Start Date	C 02/09/2014 09:20 End Date	O Default Region	(All Systems) By stem	(All Types) Type	(All Items) Item
	Replacing Annual Service : d MOT : 5 % Positioning : 2 %		eral Maintainance: 7 % Refuelling: 7 % Persona	al Use : 12 %	
		Business Trip : 55 %			
Reason			nber of times selected		
			nber of times selected		5
usiness Trip Iersonal Use			nber of times selected		1
usiness Trip Tersonal Use Refuelling			nber of times selected		1
iusiness Trip iersonal Use Refuelling General Maintainance			nber of times selected		1
lusiness Trip Fersonal Use Refuelling Jeneral Maintainance teplacing Tyres			nber of times selected		1
Vesson Business Trip Personal Use Refuelling Seneral Maintainance Veplacing Tyres Honual Service AOT			nber of times selected'		1

You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon toolbar.

Reasons on Return Chart

This report will graphically display the reason items are returned to the system. This is clearly represented by a pie chart diagram, which shows the most common uses of the items and the reasons that are logged against them when they are returned.

- 1. Click the banner named Reasons to expand the Reasons category.
- 2. Click **Reasons On Return Chart** to expand the information drop-down box which will contain a brief description of the report.

•	General
۶.	Status
×.	Exceptions
۶.	Permissions
۶.	Regions
	Reasons
	Reasons Report
	Reasons On Release Chart
	Reasons On Return Chart
	View This 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.
۶.	Utilisation
	Diagnostics

3. Select 'View This Report'.

You can filter this report by start date, end date, regions, type (item types) and items from the ribbon toolbar.

O1/06/2014 09:20 Start Date	© 02/09/2014 09:20 End Date	O Default Region	(All Systems) Gestern	(All Types) Type	(All Items)
	Replacing Tym Annual Service : 6 % MOT : 5 % Positioning : 2 %		eral Maintainance : 7 % Refuelling : 7 % Persona	l Use : 12 %	
	Busin	ess Trip : 55 %			
Reason	Busin		iber of times selected		
	Busin		wher of times selected		5
usiness Trip	Busin		nber of times selected		
usiness Trip ersonal Use	Busin		iber of times selected		5:
usiness Trip ersonal Use Lefuelling	Busin		iber of times selected		5:
usiness Trip ersonal Use Lefuelling eneral Maintainance eplacing Tyres	Busin		iber of times selected		5: 12
usiness Trip ersonal Use tefuelling seneral Maintainance teplacing Tyres unnual Service	Busin		ober of times selected		5:
Reasion Business Trip Personal Use Refuelling General Maintainance Replacing Tyres Annual Service MOT	Busin		nber of times selected		5: 12

4. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon toolbar.

4.5.7 REGION REPORTS

Users by Region Report

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

- 1. Click the banner names Regions to expand the Regions category.
- 2. Click **Users by Region Report** to expand the information drop-down box, which will contain a brief description of the report.

4	General
	Status
0	Exceptions
	Permissions
	Regions
	Users By Region Report
	View This Report
	A report showing a list of regions and under each region, who is a member of that region.
•	Utilesation
	Diagnostics

- 3. Select 'View This Report'.
- 4. The report will automatically generate.
- 5. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon toolbar.

4.5.8 UTILISATION REPORTS

Activity Chart

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

- 1. Click the banner named Utilisation to expand the category.
- 2. Click **Users by Activity Chart** to expand the information drop-down box, which will contain a brief description of the report.

	General
1	Status
1	Exceptions
1	Permissions
5	Regions
_	
- 3	Utilisation
	Activity Chart
-	

- 3. Select 'View This Report'.
- 4. The report will automatically generate.
- 5. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon toolbar.

4.5.9 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 banner names Diagnostics to expand the Diagnostics category.
- 2. Click **iFob Undetectable Report** to expand the information drop-down box, which will contain a brief description of the report.

	General
	Status
	Exceptions
	Permissions
	Regions
	Utilisation
	Diagnostics
1	Fob Undetectable Report
	View This Report
	This report shows the number of times each IFob has gone undetectable in the last 30 days
	Command List Report

- 3. Select 'View This Report'.
- 4. The report will automatically generate.
- 5. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon toolbar.

Command List Report

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

- 1. Click the banner named Diagnostics to expand the Diagnostics category.
- 2. Click **Command List Report** to expand the information drop-down box, which will contain a brief description of the report.

4	General
•	Status
0	Exceptions
	Permissions
	Regions
•	Utilisation
	Diagnostics
	Command List Report
	View This Report
	This report shows a list of all Commands

- 3. Select 'View This Report'.
- 4. The report will automatically generate.
- 5. You can export the report as a <u>PDF</u> or into an <u>Excel</u> Spreadsheet by selecting the respective buttons from the ribbon toolbar.

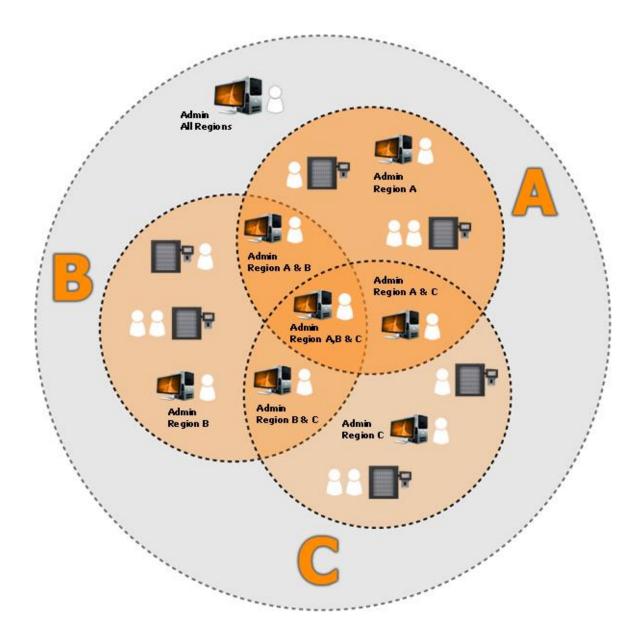
4.6 SOFTWARE SETTINGS

4.6.1 REGIONS

4.6.1.1 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 maybe 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.



4.6.2 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 on 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:

- An Administrator may be creating a User record
- The Administrator is a member of Regions Default, A & B
- The Administrator places a User into only Region A

This will now affect what access rights the Administrator can grant to the User (from the Item Access tab). This limits the list to any Item Access Groups that are a member of Region A – under the 'Partially Contained Regions' rule, but only allowing Item Access Groups that are a member of Region A only – the 'Wholly Contained Regions' rule.

This is shown below:

⑦ ⑦ ⑧		Super Admin	Log Off traka.com
Edit User	Filter Level 1	1	traka ASSA ABLOY
Edit Customise Details System Access All Regions	Expo Region Access	History	
Region A	histrator can pick a list of their Regions efault, A & B	Page size:	20
			© (
⊕ ⑦ ① ⊗ English (UK) Bedit User	Filter Level 2	Super Admin	Log Off traka.com traka ASSA ABLOY
Edit Curtom to Details System Access Item Access Groups	Region Access Web Access	Type	
Access Name IAG Region A IAG Region Default & A IAG Region Default & AB 4 Page 1 of 1 (3 items) © 1 2 2	List of Item Access Gro include those that are a groups (Rules #1 & #2) wholly contained (Rule	a member of Regionation but only those the	on A at are
♥ <u>Create Filter</u> Item Access			
• •			C I

Visible Regardless of Regions:

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

4.6.3 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 <u>Navigation Toolbar</u> at the bottom 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.

Region Search Export	
Name	
Marketing	
Research & Development	
Page 1 of 1 (2 items) 🚳 🔕 🧵 🚳 🚳	Page size: 10 -

- 2. Click the Add button.
- 3. You will then be prompted to enter a region name e.g. Research & Development.

H					
Roy	ion	History			_
N	larrie.		Research & Development		

- 4. Once you have entered a name, you can click the Save & Return button.
- 5. 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 Add button and restart the process from step 1.

4.6.4 MSME

4.6.5 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 <u>Navigation Toolbar</u> at the bottom 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.

Region Search Export	
Name	
Marketing	
Research & Development	
Page 1 of 1 (2 items) 🕼 🔇 🧵 🚳 🚳	Page size: 10

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

Stee	0
Region	History
Name	Production
	Region

- 4. Click the **Save** button.
- 5. Select the **History** tab. 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 21/03/13 by Aaron Kennedy and has been changed from **Research & Development** to **Production**.

HPZ					
Region	rv 💦				
Date	Action	Field Name	User	Old Value	New Value
	Action Modified	Field Name Name	User Aaron Kennedy	Old Value Research & Development	New Value Production
Date 21/03/2013 12:23:00 21/03/2013 08:34:36	A CONTRACTOR OF THE OWNER OWNER OF THE OWNER OWNE	and the second se			

6. Click **Save & Return** 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 1.

4.6.6 DELETING A REGION

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

1. Using the <u>Navigation Toolbar</u> at the bottom 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.

Region Search Export	
Name	
Marketing	
Research & Development	
Page 1 of 1 (2 items) 💿 💿 🧾 💿 💿	Page size: 10

- 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 Delete.



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 1.

4.7 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 <u>Permission Groups</u>.

4.7.1 CREATING A NEW SOFTWARE PERMISSIONS GROUP

1. Using the navigation toolbar at the bottom of the page, click 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 Add button.

123 0	Software Permissions Groups
E	Edit Customise
G	roup Name
S	uper Admin
Pa	age 1 of 1 (1 items) 🔣 🔇 🧕 📎 📎
T	Create Filter

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



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5. Under the name field are two expandable tick boxes, one named 'All Permissions', and the other named 'Web'. You can now expand the 'Web' list and 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 expand the 'pages' tab, and then expand the 'users' tab and select Create & Edit. Ensure that the remaining roles remain unticked as shown in the example below.

Software Per	
Details	
Name:	New Permission Group
Permissions	
Grant All Revoke A	Al Contraction of the second se
🖕 🔳 All Permissions	
🖕 🔳 Web	
🖶 📃 Features	s
🕀 🗌 Options	
😑 🔳 Pages	
🕀 🗌 Item	
🖶 🗌 iFob	
🖶 🗌 Grou	
🖶 🗌 Item	n Booking Itime Activity
	ware Settings
🖶 🗌 Syst	an shekara a tan
🖶 🗌 Syst	tem Viewer
😑 🔳 User	rs
- 🗵 -	Create
- 🗆 1	Delete
- 🗹 I	Edit
	Edit Emergency Open Role
	Edit Items Admin Role
	Edit Own User Record
	Edit Super Admin Role Edit System Admin Role
	Edit System Admin Role Edit System Reports Role
	Edit User Admin Role

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.

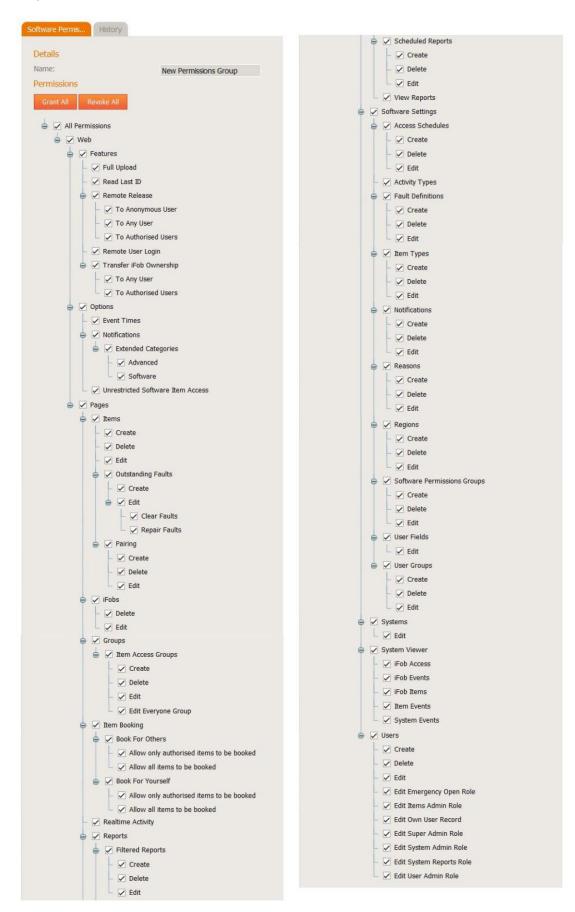
Once the group has been created, you can assign it to a user in <u>Permission Groups</u>.

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4.7.2 PERMISSIONS

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



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4.7.2.1 PERMISSIONS DETAILS

	All Permissions
╘	Veb Veb

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.

4.7.2.2	FEATURES	
	Features	
	- 🗹 Full Upload	
	- 🗹 Read Last ID	

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 card ID presented to a 16bit system within a user record on the Edit User page.



Remote Release:

To Anonymous User

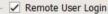
Selecting this checkbox will enable a user to release an iFob/item to a user who is not in the database.

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:

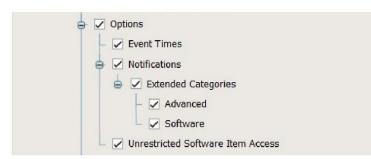
To Any User

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).

4.7.2.3 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.

4.7.2.4 PAGES

🖨 🔽 Pages	
🖕 🗹 Items	
- 🔽 Create	
- 🗾 Delete	
– 🗹 Edit	

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	
🗏 🔽 Repair Faults	

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.

🖨 🗹 Pairing	
- 🗹 Create	
- 🗹 Delete	
Edit	

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.

🖨 🗹 iFobs	
- 🔽 Delete	
Edit	

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	
- 🔽 Delete	
- 🗹 Edit	
Edit Everyone Group	

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

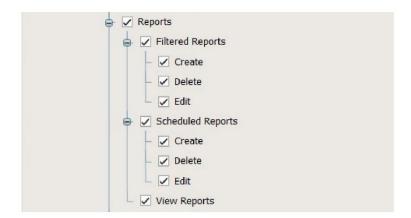
Selecting this checkbox will allow users to take all booked items even if they have not been granted access to them.

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.

Realtime Activity

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

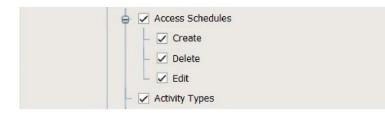
Selecting this checkbox will enable a user to delete existing Scheduled Reports in TrakaWEB.

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.

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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.

🖨 🗹 Item Types	
– 🔽 Create	
– 🔽 Delete	
Edit	

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.

➡ ✓ Notifications	
- 🗹 Create	
– 🗹 Delete	
Edit	

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.

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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.

• •	Regions
	Create
	Delete
	Edit

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 Permissions Groups	
- 🔽 Create	
- 🗹 Delete	
📙 🔽 Edit	

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. For more information, please refer to UD0260 - TrakaWEB Version 4 User Guide.

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Software Settings

User Fields:

Edit

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

🖨 🔽 User Groups	
- 🗹 Create	
- 🔽 Delete	
Edit	

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	
Edit	

Systems:

Edit

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

⊖	
- 🗹 iFob Access	
– 🗹 iFob Events	
– 🔽 iFob Items	
– 🔽 Item Events	
System Events	

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.

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	Jsers
L	✓ 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
L	Z Edit User Admin Role

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.

4.7.3 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 **<u>Regions</u>** section.

NOTE: This feature is only available in TrakaWEB 3.7.0 and above.

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

1. Using the Navigation Toolbar at the bottom of the page, click Software Settings, then select Software Permissions Groups.



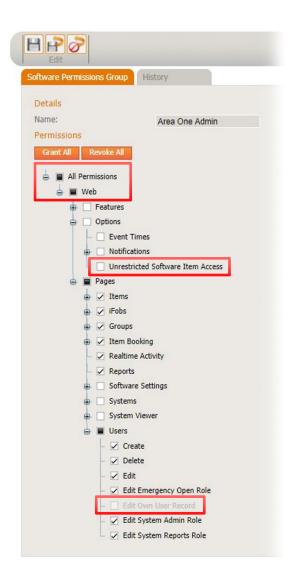
2. To create a new group, click on the Add button.



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'. You can now expand the 'Web' list and select which permissions you wish the Group to have access.



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 Permission Groups.

4.7.4 RESTRICTIONS APPLIED TO UNRESTRICTED SOFTWARE ITEM ACCESS

Once the restricted admin user logs into Traka Web, 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.

									ASSA AI
🛨 🦾 🕷		Customise	Export		gions) Region	(All Sy	stems) System	(All Ty	bes) Type
System 🔹 😔	Pos.	Detal 1 📀	Detail 📀	Detal 3 😔	Detai 4 🖂	Detail 😔	Status 😔	Who 🕑	When
5-Way_Loc	1	Office Safe	Ground	Main Office	Olney	Buckingha	In System	Traka Admin	15/01/2020 10:34:37
5-Way_Loc	2	Office Supplies Cupboard	Ground	Main Office	Oiney	Buckingha	In System	Unknown User	15/01/2020 09:37:38
5-Way_Loc	3	Warehouse Shutter Door	Ground	Main Office	Oiney	Buckingha	In System	Traka Admin	15/01/2020 10:34:43
5-Way_Loc	4	VW	Transporter	IFOB1	Diesel	Silver	In System	Unknown User	15/01/2020 09:37:39
5-Way_Loc	5	VW	Transporter	IFOB2	Diesel	Silver	In System	Traka Admin	15/01/2020 10:34:47
(

Items

C		t T	X N Export) (All I	Regions) Region		(All Systems)	ASSA A
Sync	System • 😔	Pos. •	Description	\odot	Status	\odot	Who	When
	5-Way_Loc	1	Office Safe Ground Main C Olney Buckinghamshire	Office	In System		Traka Admin	15/01/2020 10:34:37
•	5-Way_Loc	2	Office Supplies Cupboard Ground Main Office Olney Buckinghamshire		In System		Unknown User	15/01/2020 09:37:38
۰	5-Way_Loc	3	Warehouse Shutter Door Ground Main Office Olney Buckinghamshire		In System		Traka Admin	15/01/2020 10:34:43
•	5-Way_Loc	4	VW Transporter IFOB1 Sit	ver	In System		Unknown User	15/01/2020 09:37:39
۲	5-Way_Loc	5	VW Transporter IFOB2 Sil	ver	In System		Traka Admin	15/01/2020 10:34:47

iFobs

Item Access Groups		tral Assa Al
Edit Customise	Ri	egion
Name	•	Everyone Group
Safe Keys		
Vans		
<		
Page 1 of 1 (2 items) 🔇 🔇 🚺 🚫 🔘		Page size: 20
Treate Filter		

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.

₿₽⊘			
Edit Software Perr	nissio	ns Group	
	110010	ns oroup	
Details Name:			Area Two Admir
Permissions	5		
Grant All	Re	evoke All	
	- (
		Transfe	
÷.			
			Advanced Software
			ricted Software Item Acces
÷		ages Items	
		- 🗌 Cre	
		- Dek	
			tstanding Faults
		iFobs	
		- Dele	
		Groups	
		 Iter Item Bo 	m Access Groups poking
		🖶 🗌 Boo	ok For Others
		Realtime	ok For Yourself Je Activity
		Reports	
			re Settings
			cess Schedules tivity Types
		🕀 🗌 Fau	ult Definitions
		🕀 📃 Iter 🕀 🗌 Not	
		🕀 🗌 Rea	
		⊕	gions ftware Permissions Groups
		🖶 🗌 Use	er Fields
		Systems	
		- 🗌 iFot	
		– 🗌 Iter	
		– 🗌 Cre	eate
		– 🗌 Dele	
		– 🗌 Edit	t Emergency Open Role
			t Own User Record
			t System Admin Role t System Reports Role

4.8 IFOBS

4.8.1 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 <u>Navigation Toolbar</u> at the bottom of the screen click the iFob icon. 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 your Traka Touch system, their current status & various definable detail columns. To only view the iFob from a specific region or system you must select the appropriate filter from the <u>Ribbon Toolbar</u>.

Drag a	column header h	ere to g	roup by that column				
	System	0	Position +	Description	Status 📀	Who 📀	When 😔
	Ground Floor			Aston Martin	In System	Aaron Kennedy	22/03/2013 09:18:45
•	Ground Floor		2	,Mechanical Engineering ,Research & Development	In System	Aaron Kennedy	21/03/2013 14:58:06
	Ground Floor		3	ford transit	In System	Aaron Kennedy	18/03/2013 17:03:57
	Ground Floor		4		In System		14/03/2013 14:06:31
	Ground Floor		5		In System	Aaron Kennedy	20/03/2013 10:56:02
	Ground Floor		6		In System		14/03/2013 14:06:32
	Ground Floor		7	Wally	In System		14/03/2013 14:06:32
	Ground Floor		8		In System		14/03/2013 14:06:33
	Ground Floor		9		In System		14/03/2013 14:06:33
	Ground Floor		10		In System		14/03/2013 14:06:33

Region & System Filter

When looking at the iFob list you can filter which iFobs you wish to view by defining the Region the system belongs to, and the system the iFob belongs to. Clicking the small arrow button next to each 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 <u>Regions</u> and <u>Systems</u> 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 turn red.

Show/Hide Grid Columns

Throughout TrakaWEB, there are many <u>grids</u> 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 allows you to add or remove fields/columns of your choice to the grid. Every grid is different and will provide additional fields. The User list will allow you to add any or all of the eleven <u>user detail fields</u>.

4.8.2 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.

Edit							
Details	Features	Items	iFol	b Access	Access Schedules	History	
System							
Home System:		Reception					
Home Position:		1					
Current System:		Reception					
Current Position:		1					
Status:		In System					
Serial Number:		E94862050000					
Details							
Manual Description	on:						
Description:		Aston Martin Keys	3				
Tag No.:		2					
System Access	8						
Authorisers:		1	•				

<u>System</u>

System

Displays the name of the system the iFob belongs to.

Position

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

<u>Status</u>

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 <u>Adding New Item Types</u> 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.

System Access

<u>Tag No</u>

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

Authorisers

From this drop down selection box, you can choose how many users are required to authorise the release of this iFob/item.

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 <u>Feature Options</u> sections of this document.

H Ed	
tails	Features History
.	Reason Logging
*	Custom Message
٠	Notes Logging
	Fuel Logging
*	Distance Logging
	Location Logging
	Curfew

Curfew Value

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 <u>Curfew Topic</u> for more details.

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 delete the item from the iFob by clicking Delete or edit the item by clicking Edit. To create a new item you can simply click New Item.

stalis	Features	Items		Fob Acc	Hotory		
System							
System:		TKC22120					
Position		1					
Status:		In System					
Serial Numb	er.	301250050000					
Key							
Key New Zem							

iFob Access

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

rtaile	Featu	res In	ima 📕	ob Access	listory	١.,		
Forename	y s	urname • 📀	Staff Number 😔	Position 📀	Email	\odot	Street, Town 😔	Postcode 😔
Tim	De	wis .		Senior Software Developer				
Duncan	W	linner		Technical Director	9			
Aaron	Ke	ennedy		Technical Illustrator	ak@traka.co			

History

The History tab will show you a record of when the item was added, who by, what the name of the item is and if it has been changed.

la	Features	Items		Fob Access History	
Date	Action	Field Name	User	Old Value	New Value
23/04/2013 16:44:09	Modified	Description	Super Admin	Motorola,Research & Development	Research & Development
22/04/2013 09:35:12	Modified	Description	Super Admin	dedgndgn,Research & Development	Motorola,Research & Development
22/04/2013 09:34:28	Modified	Description	Super Admin		dedgndgn,Research & Development
18/03/2013 09:10:56	Modified	Description	Super Admin	,Research & Development	Mechanical Engineering ,Research & Development

4.9 SYSTEMS

4.9.1 SYSTEMS

System	Serial Number	IP Address	Region 🕑		
Ground Floor	TKC12345	10.0.1.101	Traka plc		
Reception	TKC20004	10.0.1.157	Default		
System 1	TKC1	0.0.0	Default		
System 10	TKC10	0.0.0	Default		
System 100	TKC100	0.0.0	Default		
System 101	TKC101	0.0.0	Default		
System 102	TKC102	0.0.0	Default		
System 103	TKC103	0.0.0.0	Default		
System 104	TKC104	0.0.0	Default		
System 105	TKC105	0.0.0	Default		

From here, you can view or edit the systems you currently have in the database.

Show/Hide Grid Columns

Throughout TrakaWEB, there are many <u>grids</u> 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 <u>Show/Hide</u> <u>Grid Columns</u> button allows you to add or remove fields/columns of your choice to the grid. Every grid is different and will give different fields to add to the grid. The User list will allow you to add any or all of the eleven <u>user detail fields</u>.

4.9.2 EDITING A SYSTEM

1. From the Navigation Toolbar, select the **Systems** icon.



2. You will then be taken to the **Systems** page. Select the system you wish to change and click the **Edit** button.

Systems		
Edit Tools	Customise	P
System	Serial Number	IP Address
Production	TKC23250	192.168.0.250
Main Office	TKC21689	192.168.0.200
Reception	TKC23135	192.168.0.150
<		
Page 1 of 1 (3 items)	\otimes \otimes 1 \otimes \otimes	

3. The **Edit System** page allows you to change the name of the system it belongs to.

Edit System - Re	ception
Edit	
Details History	
Details	
Title:	Reception
Region:	Default

4. Once the change has been made, click the **Save and Return** button to be taken back to the systems list.

4.10 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 <u>General > Activity</u> Report.

The customise tools in the <u>ribbon toolbar</u> will allow you to search the <u>grid</u> for information, add columns to the grid and create, edit and delete layouts. Please review the <u>ribbon toolbar</u> topic for more details.

🔩 💿 🛐 👫 🐂 🙀 🎵 🦻 Exclude Cleared Alarms								
och Custo	STREET,	Export 1	CRIPED	Algens				
					Alarm Osared			
0/06/2014 10:51:49	TKC22120	0	Door Closed	Aaron Kennedy				
0/06/2014 10:51:48	TKC22120	9	Item Removed	Aaron Kennedy				
0/06/2014 10:51:45	TKC22120	9	Item Returned	Aaron Kennedy				
0/06/2014 10:51:44	TKC22120	9	Item Removed	Aaron Kennedy				
0/06/2014 10:51:39	TKC22120	9	Item Returned	Aaron Kennedy				
0/06/2014 10:51:37	TKC22120	9	Item Removed	Aaron Kennedy				
0/06/2014 10:51:32	TKC22120	10	Item Removed	Aaron Kennedy				
0/06/2014 10:51:25	TKC22120	0	Door Opened	Aaron Kennedy				
0/06/2014 10:51:10	TKC22120	0	Door Closed	Aaron Kennedy				
0/06/2014 10:51:09	TKC22120	4	Item Removed	Aaron Kennedy				
0/06/2014 10:51:06	TKC22120	3	Item Removed	Aaron Kennedy				
0/06/2014 10:51:03	TKC22120	2	Item Removed	Aaron Kennedy				
0/06/2014 10:50:58	TKC22120	1	Item Removed	Aaron Kennedy				
0/06/2014 10:50:50	TKC22120	0	Door Opened	Aaron Kennedy				
0/06/2014 00:00:03	TKC22120	0	DB Backup To SD Card Successful					

To view the full list of activities, select the Software Settings button from the <u>Navigation Toolbar</u> and click the Activity Types button as shown below.



This will display all the activity types that exist within the Traka Touch system.

	 Realtime Activity 		
Admin Access			#00FF00
Admin Override of Empty Slot	2	V	#99CCFF 🔛
dmin Override of Undetectable Fob		Ø	#608080 🔛
All Items Returned in Surveillance Mode		2	#FFFFFF E
App Closed	V	8	📕 #FF0000 📓
App Startup	Ø		#FFFF99
Application Upgrade Completed		Ø	#FFFF99
Application Upgrade Failed			#FF6600
Application Upgrade Requested			#FFCC00
Authorisation Approved	V		SEFFFFF S
Authorisation Cancelled			#FFFFFF
Nuthorisation Denied			#FFFFFF
Battery Critical	V	V	#FF6600
Battery Low			#FFCC00
Sattery OK	V		#FFFFFF
Sattery/Alarm Panel Closed		Ø	#FF9900
Battery/Alarm Panel Open	2		#FF0000
CAN Device Redetectable	2		#FFFP99
CAN Device Undetectable	Ø		#FF0000
Command Not Recognised		2	effffff 🔤

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.

Activity	Realtime Activity	Alarm Activity	Activity Colour
Admin Access	×		#00FF00

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.

Customer				
Activity	 Realtime Activity 	Alarm Activity	Activity Colour	E
Admin Access		×	#FF0000	

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.

A Cleared Alarms						
When -	System 📀	Position	Fob Description	Activity	Who	Alarm Cleared
10/06/2014 10:55:36	TKC22120	0		Admin Access	Aaron Kennedy	
10/06/2014 10:51:49	TKC22120	0		Door Closed	Aaron Kennedy	
10/06/2014 10:51:48	TKC22120	9		Item Removed	Aaron Kennedy	
10/06/2014 10:51:45	TKC22120	9		Item Returned	Aaron Kennedy	

Clearing Alarms

To clear an alarm from the grid, simply click the alarm cleared check box. If you have multiple alarms listed in the grid, you can select the clear all alarms button (shown below) from the ribbon toolbar.



You can view all the alarms you have cleared by selecting 'Include Cleared Alarms' from the drop down selection box on the ribbon toolbar. The alarms will still be marked as cleared but they will now be visible again on the activity grid.



Alarms that have been cleared can be viewed in the Exception > Alarms Report.

4.11 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 setup within Traka Touch. For more information on the Traka Touch process for Authorisation, please refer to **UD0011 – Traka Touch User Guide.**

4.11.1 ASSIGNING A USER WITH THE AUTHORISER ROLE

1. Access the User list by selecting the User icon from the Navigation toolbar.



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 <u>Add Users</u>.

2. Select a User to edit and then navigate to the System Access tab.

Details	System Access	Item Access	Region A
User		_	
Forename:	Au	uthoriser	
Surname:	Us	ser 1	
Display Name Ove	rride:		
Display Name:	Au	uthoriser User 1	
Details			
Language:	S	ystem Default	
Staff Number:			

The option for assigning a user with the Authoriser role is located on the System Access Grid.

3. Click in the Authoriser check box to assign the selected user as an Authoriser.

\odot	Fault Logging 🛇 Admin	Allowance	\odot	No. of Items	Authoriser 📀	Auth. Override 오	Item Handover	\odot	Curfew		
		System Default	-	0	V		None	•	None	•	
• Page	e 1 of 1 (1 item	s) 🕜 🕜 1 🖸	0					p	age size:		20
• <u>Cr</u>	eate Filter										

4. If the selected User is also to have the Authoriser Override role, click in the Auth. Override check box.

\odot	Fault Logging 🛇 Admin	Allowance	\odot	No. of Items	Authoriser 😔	Auth. Override 오	Item Handover	\odot	Curfew		
		System Default	-	0	V	V	None	-	None	•	
• Page	e 1 of 1 (1 item	s) 🔇 🔇 🔟 🖸	8					Pa	age size:		20 🔽
9 <u>Cr</u>	eate Filter										

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5. Once completed, click Save & Return.

4.11.2 SELECTING ITEMS THAT REQUIRE AUTHORISERS

1. Select the iFob icon from the Navigation Toolbar.



2. Double click to select an iFob from the list.

۲	New System	1	In System	Traka Admin	27/01/2020 08:36:45
۲	New System	2	In System	Traka Admin	27/01/2020 08:36:46
۲	New System	3	In System	Traka Admin	27/01/2020 08:36:46
۲	New System	4	In System	Traka Admin	27/01/2020 08:36:46
۲	New System	5	In System	Traka Admin	27/01/2020 08:36:46
	New System	6	In System	Traka Admin	27/01/2020 08:36:46
۲	New System	7	In System	Traka Admin	27/01/2020 08:36:46
	New System	8	In System	Traka Admin	27/01/2020 08:36:46
۲	New System	9	In System	Traka Admin	27/01/2020 08:36:47
	New System	10	In System	Traka Admin	27/01/2020 08:36:47

You will now be taken to the Edit iFobs page.

3. From the Edit iFob Details page, select the **Features** tab and then expand the **Item Authorisation** panel.

s Features Items IFob Acce	ss History		
Item Authorisation			
Authorisation required upon removal:	None	~	
Authorisation required after return:	None	~	
Authorisers must be from different gr Authoriser must be granted access to			

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.

H P 2		
Details Features Items IFob Acces	ss History	
Item Authorisation		
Authorization required upon removal:		
Authorisation required upon removal:	None	~
Authorisation required upon removal: Authorisation required after return:	None None	~
	None	~
Authorisation required after return:	None	~
Authorisation required after return: Authorisers must be from different gro	None 1 Authoriser	Y

5. Select the Authorisation required after return drop-down and assign the required number of Authorisers.

H P 2	
Details Features Items IFob Acce	ss History
- Item Authorisation	
Authorisation required upon removal:	1 Authoriser
Authorisation required after return:	None
Authorisers must be from different gro	None
Authoriser must be granted access to	1 Authoriser
Curfew	2 Authorisers 3 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.

ils Features Items IFob Acce	ss History		
Item Authorisation			
Authorisation required upon removal:	None	~	
Authorisation required after return:	None	~	
Authorisers must be from different gro Authoriser must be granted access to			

Another check box is also available; Authoriser must be granted access to this iFob.

Edit			
ils Features Items iFob Acces	ss History		
Item Authorisation			
Authorisation required upon removal:	None	~	
Authorisation required after return:	None	~	
Authorisers must be from different arc	oups		
	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 & Return**.

4.11.3 TAKING ITEMS/IFOBS

A user may access the system using their Keypad ID, Swipe Card 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.

* 0 27/01/2020 11:23:54			`aka ABLOY
Pos 1: Item 1 requires authorisation. Please ask authoriser 1 of 1 to swipe their Card or			_
enter their Keypad ID.	1	2	3
	4	5	6
	7	8	9
Cancel	$\overline{\times}$	0	4

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NOTE: If the user has the Auth. 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.**

4.12 AUTHORISER FROM A DIFFERENT GROUP ON REMOVAL & RETURN

In certain work environments, particularly Casinos, a rule maybe 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 check box will enable Authorisers from different groups. This will not be available if the Traka Touch App version does not support this functionality.

This option is compatible with FRSS & RRSS Key Cabinets and RFID Locker Systems.

4.12.1 ENABLING THE OPTION

1. From the iFob screen, select the Item/iFob to which you wish to apply the authorisation.

۲	New System	1	In System	Traka Admin	27/01/2020 08:36:4
	New System	2	In System	Traka Admin	27/01/2020 08:36:4
۲	New System	3	In System	Traka Admin	27/01/2020 08:36:44
۲	New System	4	In System	Traka Admin	27/01/2020 08:36:44
۲	New System	5	In System	Traka Admin	27/01/2020 08:36:44
۲	New System	6	In System	Traka Admin	27/01/2020 08:36:44
۲	New System	7	In System	Traka Admin	27/01/2020 08:36:44
۲	New System	8	In System	Traka Admin	27/01/2020 08:36:44
۲	New System	9	In System	Traka Admin	27/01/2020 08:36:43
۲	New System	10	In System	Traka Admin	27/01/2020 08:36:4

2. From the Edit iFob Details page, select the Features tab and then expand the Item Authorisation panel.

s Features Items iFob Acce	ss History		
Item Authorisation			
Authorisation required upon removal:	None	~	
Authorisation required after return:	None	~	
Authorisers must be from different gro Authoriser must be granted access to			

You will notice two drop-down boxes. One for **Authorisation required upon removal** and one for **Authorisation required after return.**

3. Select the Authorisation required upon removal drop-down and assign the required number of Authorisers.

ails Features Items IFob Acces	ss History	
Authorisation required upon removal:	Mana	
Authorisation required upon removal:	None	~
Authorisation required after return:	None	~
Authorisation required after return: Authorisers must be from different gro	None	~
Authorisation required after return:	None	~

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6. Select the **Authorisation required after return** drop-down and assign the required number of Authorisers.



After selection, the checkbox for **Authorisers must be from different groups** will now be available. Place a tick in the box.

ils Features Items iFob Acces	ss History	
Item Authonisation		
Authorisation required upon removal:	1 Authoriser	~
Authorisation required after return:	1 Authoriser	~
Authorisers must be from different gro Authoriser must be granted access to		

NOTE: It is important that this check box is ticked; otherwise, the functionality will not be available for authorisers from different groups.

Another check box is also available; Authoriser must be granted access to this iFob.

etails Features Items IFob Acces	ss History	
Item Authorisation		
Authorisation required upon removal:	1 Authoriser	~
Authorisation required after return:	1 Authoriser	~
Authorisers must be from different gro	oups 🔽	
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.

7. Once complete, click on Save & Return.

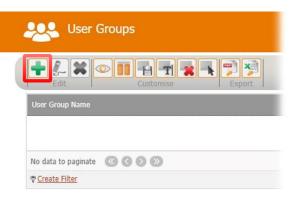
4.12.2 CREATING USER GROUPS

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 on the Navigation Toolbar, select the User Groups icon.



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 & 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.

4.12.3 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 on the Navigation Toolbar.



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 & Return**.



4.12.4 DELETING A USER GROUP

Providing 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 on the Navigation Toolbar.



2. Select the User Group to delete and then click on the Delete button.



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You will then be required to confirm that you wish to delete the selected group. Selecting the **Delete** button will remove it and selecting **Back to List** will return to the list of User Groups.



4.12.5 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 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 dropdown menu, select a User Group to assign the selected User.

Active:					
Start Date:	27/01/2020 00:00:00				
Expiry Date:	27/01/2050 00:00:00				
Permit Expiry Date:	27/01/2050				
uthoriser Group:	Group 1				
	None				
	Group 1				
	Group 2				

- 4. Repeat the above process to assign the authoriser to a different User Group.
- 5. Once completed, click on Save & Return.

4.12.6 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.**

4.12.7 AUTHORISER 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 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.

Edit	*	•	Customise	Export		+ &- Edit		Custo		Export
\odot	Sync	Displa	Column Chooser	8		•			Authoriser - 😔	Staff Numi
0			Authoriser Group				۲	Traka User 1	Group 1	5678
	۲	Autho					۲	Authoriser 1	Group 1	2345
	•	Autho	Building	\odot			۲	Authoriser 2	Group 2	3456
	-						۲	Traka User 2	Group 2	5678
	•	Autho	Email	\odot			۲	Traka User 3	Group 3	5432
	•	Autho	Contractor and the second second					Authoriser 3	Group 3	3456
	۲	Traka	Forename	- 🛇			-			
		Traka					-	Authoriser 4	Group 4	4567
	-						-	Traka User 4	Group 4	6543
		Traka	User 2				۲	Traka User 5	None	1324

The **Authoriser Group Column** will display all the available User Groups and the users that are associated with them. Using the down arrow at the top of the column it is possible to filter which users are associated with individual User Groups.



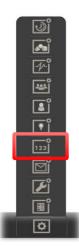
By selecting the 'eye' icon on the ribbon toolbar, the user groups may also be grouped. This way, you can expand the group list and view the user details for the Authoriser Group.

Edit	*	Custor	TI 😹 🖡 厚	xport	ult R	F	ŀ	Edit		Customise		Exp	V iort
Drag a co	lumn he	ader here to group by	that column					thoriser _	• 📀				
0			Authoriser Group	Staff Number				0	Sync	Display Name 🕑	Staff Number	\odot	Job F
		9	\$	\$						7		7	
	۲	Traka User 1	Group 1	5678	T	E	3	Authoris	er Grou	p: Group 1			
	۲	Authoriser 1	Group 1	2345	0				۲	Traka User 1	5678		Trak
	0	Authoriser 2	Group 2	3456	Pr				۲	Authoriser 1	2345		Office
	-	Traka User 2	Crawn 2	5678	M	E	9	Authoris	er Grou	ip: Group 2			
	-		Group 2			E	9	Authoris	er Grou	ip: Group 3			
	•	Traka User 3	Group 3	5432	T	+]	Authoris	er Grou	p: Group 4			
						(+	3	Authoris	er Grou	ip: None			

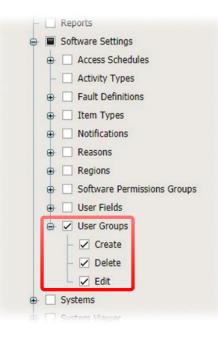
4.12.8 SOFTWARE PERMISSIONS

A Software Permissions category is provided within <u>Software Permission Groups</u> with Create, Edit and Delete permissions.

1. From Software Settings on the Navigation Toolbar, 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 & Return.

4.12.9 AUDITING

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.

<u>User</u>

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.

Edit User - Autl	horiser User 4			traka ASSA ABLOY
Edit				
Details System A	Item Access	Region Access	Access Schedules Web Access	History
User				
Forename:	Authoriser			
Surname:	User 4			
Display Name Override:				
Display Name:	Authoriser User 4			
Details				
Language:	System Default	•		
Staff Number:				
Job Role:	Authoriser			
Tel:				

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).

iFob information is divided into three segments and divided by a pipe character:

Home System | Home Position | iFob Description (if present)

	T	e Exp				
ils Sy	/sten	Access Item /	Access Region Acces	Access Schedules	Web Access	History
Date	•	Action	Field Name	Who	Old Value	New Value
12/02/2020 11:35:00		Modified	User Group	Super Admin	Group 4	Group 2
12/02/2020 11:34:15		Added To	Item Access Group	Super Admin		Access Group 4
12/02/2020 11:34:13		Added To	Item Access Group	Super Admin		Access Group 3
12/02/2020 11:34:11		Added To	Item Access Group	Super Admin		Access Group 2
12/02/2020 11:34:08		Added To	Item Access Group	Super Admin		Access Group 1
12/02/2020 11:17:24		Modified	User Group	Super Admin		Group 4
12/02/2020 11:05:35		Access Added	iFob	Super Admin		New System 10
12/02/2020 11:05:35		Access Added	iFob	Super Admin		New System 9

Item Access Groups

To access the audit data for Item Access Groups:

- 1. Navigate to the Item Access Groups page.
- 2. Double click on the required Item Access group.

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You will now be taken to the Edit Item Access Group page for the selected Item Access Group.

3. Click on the History tab.

Edit Item Access Group - Access Group 1								
Edit								
Details Reg	ion Item Access	Users	History					
Name:	Access Group 1							
Everyone Group:								

The history page will display the audit information for that Item Access Group as shown in the example below.

The **Old Value** and **New Value** columns show any changes that have occurred such as access being revoked to a group (Old Value) and granted to another (New Value). This creates a record for each iFob.

iFob information is divided into three segments and divided by a pipe character:

Home System | Home Position | iFob Description (if present)

el Custom		rt I			
ails Regio	on Item A	ccess Users	History		
Date -	Action	Field Name	Who	Old Value	New Value
12/02/2020 11:46:59	Access Added	iFob	Super Admin		New System 6
12/02/2020 11:46:57	Access Removed	iFob	Super Admin	New System 1	
12/02/2020 11:46:54	Access Removed	iFob	Super Admin	New System 4	
12/02/2020 11:46:18	Access Removed	iFob	Super Admin	New System 2	
12/02/2020 11:46:17	Access Added	iFob	Super Admin		New System 5
12/02/2020 11:46:15	Access Added	iFob	Super Admin		New System 4
12/02/2020 11:46:13	Access Added	iFob	Super Admin		New System 3
12/02/2020 11:23:30	Access Added	iFob	Super Admin		New System 2
12/02/2020 11:23:28	Access Added	iFob	Super Admin		New System 1

4.13 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 curfew, 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.

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).

 ${\cal D}_{-}$ When this icon is displayed, the item is currently out under a curfew.

 \blacktriangleright - 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.

4.13.1.1 USER CURFEWS

Curfew Types

<u>Absolute</u>

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 the 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. The grid at the bottom contains a column named Curfew Value. 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).

C K El Pl Pl	ard ID: typad I trolime N: N Expi N Forc	ID:		2222 17/03/2046		S E A	uctive: Kart Date: Xipiry Date: Withoriser: Yermit Expiry Dat	81	✓ 17/03/201 17/03/204 21/03/204	46			
1		ktive 오	Admin 😔	Reports 😔	Allewance	0	No. of Rems	Curfew					
					Unlimited	-	0			Minute: 30	-	-	
			Y		System Default		10	Relative	 Days: 2 	Hours: 12	Minutes:	0	
		of 1 (2 item		00					Page	size:		20 🔽	
3	Create	e Filter											

3. Once you have completed the curfew select one of the Save options at the top of the window.

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Hours: 0 C

4.13.1.2 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.

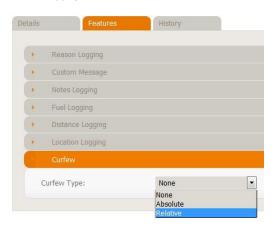
<u>Relative</u>

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.

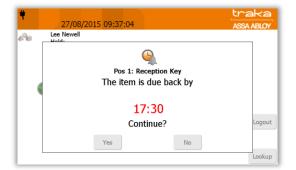
- 1. To set an iFob curfew, highlight the desired position from the system viewer and select the edit iFob button. Alternatively, you can select the iFob icon from the navigation toolbar, then from the iFob list highlight the desired iFob and select the edit iFob button.
- 2. The iFob details will then appear. Navigate to the Features tab.
- 3. At the bottom of the window, you will notice the curfew fields. 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.

Traka Touch

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.

4.13.2 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'.

𝔅 ♥ 18/04/2016 15:52:39	traka ASSA ABLOY
Welcome Rob, please select an option below:	
I Know What I Want	
Reports Admin	Logout

2. You will now be taken to the 'Administration' screen. Click on 'Items'.

®#					tr	aka
	18/04/20	16 15:36:	28		ASS	A ABLOY
¢	Administra	tion Mac Ac	lo.: TKC23135 ldress:04-CB-1D-8 sion:01.07.4370.0		Battery backup capacity	-
		OS Buik	d version: 2.7		Flash disk used space	
			DB version: 1.0.40			15%
			version: 2.3.2 (15/0 version: 1.0.7 (28/0			
		DV100	VEF STOFT: 1.0.7 (20)	59/2010)		
8		Ø	P			
Users	Items	General	Network	Reader	Config	
Ð			¥	?	20	
Alarms	Clock	Data	Power	Help	Diag	Exit

3. Select the item you wish to apply the Curfew against and then click on 'Edit'.

® #	18/04/	2016 15:37:55		trak: ASSA ABLO					
A90	Item adr	ninistration	1 / 10		All Items				
Home	Serial Number	Description		Status	Slot				
1	324975030000	Red Ford Focus		In	1	Setup			
2	E94862050000	Silver Ford Focus		In	2	Edit			
3	682C62050000	HR Department		In	3	Lon			
4	B58C63050000	Store Room		In	4	Remove			
5	1BED61050000	Filing Cabinet		In	5	-			
6	724C62050000	Reception Key		In	6				
7	35AB61050000	Maintenance Store		In	7	\bigcirc			
8	C64962050000	Meeting Room		In	8				
9	D6F04F050000	Training Materials		In	9	Europe			
10	7C5264050000	Garage key		In	10	Export			
						Exit			

4. The next screen allows you to change the description of the Item if required. Click on 'Options' to continue.

8											tr	aka
		18/0	4/201	16 15	:39:2	8	ASSA ABLO					
49	Ite	em a	dmin	istra	tion							
	Positi	on: 1				9	Serial No	o.: 3249	750300	00		
C C	Descripti	on: Red	Ford Fo	ocus							2	A.
												~
	1	2	3	4	5	6	7	8	9	0		
12?		10		100							*	
	Q	W	E	R	T	Y	U	I	0	Р		
A	e	+	-	5	%	8.	*	()	1	-	Options
A	A	S	D	F	G	н	J	К	L			0
	•	-		1				1	/	¥	?	Save
+	z	X	с	v		Space		В	N	M	,	Cancel
						•						Caricer

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'.

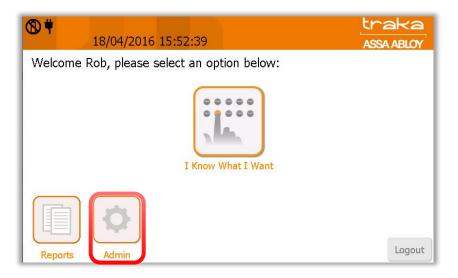
⑧ ♥ 18/04/2016 15:30:50		traka ASSA ABLOY
Item administration		ASSA ABLOT
This item does not require authorisation		
Curfew Type:	None	
Item due back in 365 day(s), 23 hour(s), 59 minute(s)	Specific time of day	
	Days / hours / minutes	
Day(s): Hour(s):	Minute(s):	Details
		Detalis
		Save
		Cancel

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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'.

®#	18/04/20	16 15:36:	28			°aka sa aBloy
¢	Administra	CION App vei OS Buil SQL CE CB FW	No.: TKC23135 ddress: 04-CB-1D-8 rsion: 01.07.4370.0 ld version: 2.7 E DB version: 1.0.40 version: 2.3.2 (15/0 version: 1.0.7 (28/0	0001 02/2016)	Battery backup capao	:ity -
8		•				
Users	Items	General	Network	Reader	Config	
Ø	G		¥	?	Pe	
Alarms	Clock	Data	Power	Help	Diag	Exit

3. Select the User you wish to apply the Curfew against and click 'Edit'.

®#		aka ABLOY
💄 U	Iser administration All Users	
Forename <mark>Rob</mark>	Surname Admin Reports	Add
Test User		Edit
Super Dave	Admin Jones V	Delete
		Import
		Export
		Exit

4. The next screen will allow you to edit details about the User if required. Click on the 'Access' button.

			6/201			3						raka sa abloy
8	Us	ser a	dmin	istra	tion							
	Forenar	ne: Tra	ka									
	Surnar	me: Adr	nin									
Disp	lay Nar	ne: Tra	ka Admi	n								
k	(eypad	ID: 123	34				F	PIN:				
	Card	ID:					Langua	age: (Eng	lish (UK))
Enro	olment	ID:						_				
	1	2	3	4	5	6	7	8	9	0		
12?	q	w	е	r	t	v	u	i	0	р	*	
	<u> </u>	+		s	%	<u>y</u>				_		Access
A	9		_	3	79	c.		,	,		44	ALLESS
	а	S	d	f	g	h	j	k				Save
			-	1				1	/	/	?	Save
*	z	x	с	v		Space		b	n	m	,	Cancel

5. You will now be taken to the 'User Administration' screen. Click the 'Options' button to continue.

®#	18/04/2016 16:16:18	traka ASSA ABLOY
8	User administration	
	Access: All None Admin Reports	10
		Options
		Save
		Cancel

6. You will now be taken to the next 'User Administration' screen. Click on the 'Next' button.

1			traka
	18/04/2016 16:17:27		ASSA ABLOY
8	User administration		
	User Active Date: 09/03/2016 00:00		
	User Expiry Date: 09/03/2046 00:00		
	PIN Expiry Date: 09/03/2046 00:00		
	Force user to change PIN on next login:	•	
	Allow user to authorise iFob and/or system access:	•	Next
	No Item Allowance enforced.		Save
			Cancel

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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 cycle up and down through the units corresponding to Days, Hours and Minutes. Once you have set the Curfew. Click on 'Save'.

18/04/2016 15:30:50 €		traka ASSA ABLOY
User administration		
User Curfew Type: Item due back in 2 day(s), 12 hour(s), 0 minute(s)	None Specific time of day	
	Days / hours / minutes	
Day(s): Hour(s):	Minute(s):)
		Details
		Save
		Cancel

4.14 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-

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 maybe 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.

4.14.1 ENABLING THE OPTION

1. To enable the Emergency Open option, select a user from the users' list within TrakaWEB and then select Edit.

Sync Display Name 😔 Staff Number 📀 Job Role 📀 Tel 😔 Fax	
Super Admin	
Fault Admin User	
Item User 1	
Item User 2	

2. At the **Edit User** screen, select the System Access tab.

HP2						
Details	stem Access	Item Access	Region Access	Web Access	History	
User						
Forename:	Trak	a				
Sumame:	Adm	ninistrator				-
Display Name Overrid	e: 📋					
Display Name:	Trak	a Administrator				
Details						
Language:	Sys	stem Default				
Staff Number:	123-	4				
Job Role: *	Adm	ninistrator				
Tel:	012	34 123123				
Fax:						
Mobile: *						Choose File No file chosen
Consile .						

3. Towards the bottom of the page, the Emergency Open option will be available. Click on the check box to enable it as shown below.

tails	System Access	Item Aco	ess Gr 1b	an Access	Region Access	Veb Ac	cess History				
Card ID:					Activ	e:			2		
Keypad ID: Enrolment ID: PIN: PIN Explry Date:			1111		Start Date:				27/08/2021 09:01:53		
					Expiry Date:			27/08/2071 09:			
				Permit Expiry Date:				27/08/2051			
			26/09/2021		Authoriser Group:				None		
IN Force	Change:										
ingers Er	arolled:										
	System 📀	User Admn	items Admin 🕑	System Reports	Alowance	۲	Authoriser 📀	Auth. Overnde	Qurfew		Emergency Open

4. Once completed, click on Save & Return.

4.14.2 SOFTWARE PERMISSION 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 toolbar, select the Software Permissions Groups icon.



2. From the software Permissions Groups page, select the Group you wish to apply the Permission to.



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.**

Software Permis	History	
Details		
Name:		New Dermissions Crown
Permissions		New Permissions Group
Grant All R	evoke All	
🖨 🔳 All Permi	issions	
🖨 🔳 Web		
÷ 🗆 I	Features	
	Options	
ė 🔳 I	Pages	
	Items	
	iFobs	
⊕ -	— .	
	Item Booking	
-	Realtime Activity	
⊕ -	Reports	
	Software Setting	IS
	Systems	
	Users	
	- Delete	
	– 🔲 Edit	
	- Edit Emerger	ncy Open Role
	– 📃 Edit Items A	dmin Role
	- Edit Own Us	er Record
	– 📃 Edit Super A	dmin Role
	– 🗌 Edit System	Admin Role
	– 🗌 Edit System	Reports Role
	Edit User Ad	min Role

4. Once complete, click on Save & Return.

4.14.3 USING EMERGENCY OPEN

With the Emergency Open option enabled, access the Traka Touch system using keypad, fingerprint or card. 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.

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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.



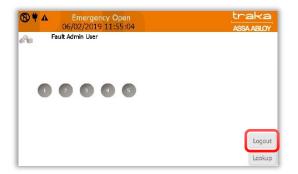
You will now be taken to the 'I Know What I Want' screen. Here you will be shown all the items currently in the system and their status. The item icons will change as the items are removed from the system.

NOTE: Closing all the doors at this stage will automatically log you out and return to the main login screen.

Image: Second system Emergency Open 06/02/2019 11:46:44	traka ASSA ABLOY	Image: Second Secon	traka ASSA ABLOY
Fault Admin User		Fault Admin User	
00000			
	Logout		Logout
	Lookup		Lookup

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 1 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.

® † 06/02/2	019 12:07:27	,			aka A ABLOY
To access the syste or press Search to		ur ID			
			1	2	3
			4	5	6
			7	8	9
Search Help	New PIN	Enrol	$\overline{\times}$	0	L

4.14.4 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-critical and critical faulty items.

	Pos.	Tag No.	Description 🛇	Status	$\overline{\mathbf{v}}$
۲				In System	
	2				
0	3			In System	
	4			In System	
0	5			In System	

- 1. With the Emergency Open option enabled, access the Traka Touch system using keypad, fingerprint or card.
- 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.



At the next screen, you will be required to acknowledge that the item has a critical fault.

5. Select the **Continue** button to accept the critical fault.

6	🗘 🗰 Emergency Open	traka
	06/02/2019 09:14:52	ASSA ABLOY
4	Pos 1: has critical faults. Please acknowledge these item faults by clicking 'Contin	ue' below:
	Fault	
L	Broken Case	0
L.		
	Continue Cancel	Help

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.

4.15 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 maybe 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**.

S 🕈 🕯 24/0	09/2021 10:04:06			`aka ™a ABLOY
User a	dministration 2/8	A	l Users	
Search:	Surname	Admin	Reports	Add
Traka	Admin			Edit
Traka	User 1			
Traka	User 2			Delete
Traka	User 3			
Traka	User 4			
Traka	User 5			Import
Traka	User 6			Import
Traka	User 7			Export
				Exit

2. At the next screen, select the **Roles** button.

® #1	24 24	1/09/2021	10:26:51					°aka s∧ ABLOY
8	User	adminis	tration					
	Access:	All	None	Roles				
		1 2 ⁰	3 ⁰ 4 ⁰	5 6	7 8	° 9 [°]	10	
								Options
								Save
								Cancel

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.

\\$\#		traka
	25/08/2021 14:25:31	ASSA ABLOY
8 r	User administration	
	User Roles	
	Roles	
	Booking Override	
	Item Access Schedule Override	
	Authoriser 🗢	
	Authorisation Override	Options
	Emergency Open 🔗	options
	ок	Save
	OK	
		Cancel

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.

♥ ♥ 25/08/2021	14:49:54	traka ASSA ABLOY
Welcome Admin, please	e select an option below:	
	I Know What I Want	
		Logout
Reports Admin	Emergency	Logour

4.15.1 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 Toolbar, Select Reports.



At the Reports page, select the **General** tab followed by the **Activity Report** tab and then select **View This Report**.



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.

	System 🛇	Pos.	Tag No.	Description	Activity 🛇	Who
06/02/2019 09:25:36	New System				User Logged Out	Fault Admin User
06/02/2019 09:25:36	New System				Emergency Open Deactivated	Fault Admin User
06/02/2019 09:25:35	New System	5			Door Closed	Fault Admin User
06/02/2019 09:25:33	New System	4			Door Closed	Fault Admin User
06/02/2019 09:25:30	New System	3			Door Closed	Fault Admin User
06/02/2019 09:25:27	New System	2			Door Closed	Fault Admin User
06/02/2019 09:25:26	New System	1			Door Closed	Fault Admin User
06/02/2019 09:24:38	New System	1			Door Emergency Opened	Fault Admin User
06/02/2019 09:24:23	New System	5			Door Emergency Opened	Fault Admin User
06/02/2019 09:24:22	New System	4			Door Emergency Opened	Fault Admin User
06/02/2019 09:24:21	New System	3			Door Emergency Opened	Fault Admin User
06/02/2019 09:24:20	New System	2			Door Emergency Opened	Fault Admin User
06/02/2019 09:24:20	New System				Emergency Open Activated	Fault Admin User
06/02/2019 09:24:18	New System				User Logged In	Fault Admin User
06/02/2019 09:16:43	New System				User Logged Out	Fault Admin User
06/02/2019 09:16:43	New System				Emergency Open Deactivated	Fault Admin User
06/02/2019 09:16:42	New System	5			Door Closed	Fault Admin User
06/02/2019 09:16:40	New System	4			Door Closed	Fault Admin User
06/02/2019 09:16:38	New System	4			Item Returned	Fault Admin User
06/02/2019 09:16:37	New System	3			Door Closed	Fault Admin User

From the Realtime Activity icon on the Navigation Toolbar, 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 Toolbar.



The next page will now display the list of generated alarms as shown in the example below.

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			Tag No.			Alarm Cleared
5/02/2019 09:25:36	New System			User Logged Out	Fault Admin User	
5/02/2019 09:25:36	New System			Emergency Open Deactivated	Fault Admin User	
5/02/2019 09:25:35	New System	5		Door Closed	Fault Admin User	
5/02/2019 09:25:33	New System	4		Door Closed	Fault Admin User	
5/02/2019 09:25:30	New System	3		Door Closed	Fault Admin User	
5/02/2019 09:25:27	New System	2		Door Closed	Fault Admin User	
5/02/2019 09:25:26	New System	1		Door Closed	Fault Admin User	
5/02/2019 09:24:38	New System	1		Door Emergency Opened	Fault Admin User	
5/02/2019 09:24:23	New System	5		Door Emergency Opened	Fault Admin User	
5/02/2019 09:24:22	New System	4		Door Emergency Opened	Fault Admin User	
5/02/2019 09:24:21	New System	3		Door Emergency Opened	Fault Admin User	
5/02/2019 09:24:20	New System	2		Door Emergency Opened	Fault Admin User	
5/02/2019 09:24:20	New System			Emergency Open Activated	Fault Admin User	
5/02/2019 09:24:18	New System			User Logged In	Fault Admin User	
5/02/2019 09:16:43	New System			User Logged Out	Fault Admin User	
02/2019 09:16:43	New System			Emergency Open Deactivated	Fault Admin User	
02/2019 09:16:42	New System	5		Door Closed	Fault Admin User	
02/2019 09:16:40	New System	4		Door Closed	Fault Admin User	
02/2019 09:16:38	New System	4		Item Returned	Fault Admin User	
02/2019 09:16:37	New System	3		Door Closed	Fault Admin User	

4.16 RRSS (RANDOM RETURN TO SINGLE SYSTEM)

This feature is available from TrakaWEB V2.3.0 and 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.

4.16.1.1 IFOB LIST

With the RRSS feature enabled, the iFob list displays an additional column named Index. In addition to this you can enable the Current Position column to allow you to see the current location of each Item.

	System 👽	Pos.	Current Position	Index ·	Description	\odot	Status	\odot	Who	\odot	When
•	Ground Floor		1	1	Reception		In System		Lee Newell		30/07/2015 15:09:08
	Ground Floor		2	2	Warehouse		In System		Lee Newell		30/07/2015 15:09:05
	Ground Floor		3	3			In System				30/07/2015 14:28:48
	Ground Floor		4	4			In System				30/07/2015 14:28:49
	Ground Floor		5	5			In System				30/07/2015 14:28:49
	Ground Floor		6	6			In System				30/07/2015 14:28:49
	Ground Floor		7	7			In System				30/07/2015 14:28:50
	Ground Floor		8	8			In System				30/07/2015 14:28:50
	Ground Floor		9	9			In System				30/07/2015 14:28:51
•	Ground Floor		10	10			In System				30/07/2015 14:28:51

NOTE: The 'Pos.' column for RRSS systems is not used.

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<u>Index</u>

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 Traka Touch User Guide (UD0011) in the RRSS section.

4.16.1.2 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 Traka Touch User Guide - UD0011 in the RRSS section.

4.16.1.3 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 only difference is that the Item List shows the index numbers rather than the 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.

Edit		Customi		Exp	y ort	(All Type	es)			Тур)e				
etails	System	Access	Iten	n Access		Region Acces	s	Web Acc	ess	Histor	y				
Item Aco	ess Groups														
Item Ace		_	_	_	_	_	_	_	_	_	_	_		_	
Access		lame											• Eve	ryone Gro	up 🕑
						No dat	a to di	splay							
						110 440	a co ui	spidy							
			~												•
	o paginate 🔍	00	»							P	age size	e:			10 🔽
P Create F	Filter														
Item Acc	ess														
Grant	All Revo	ke All													
Grant Access	All Revo		Index 🔸	Detail 1	\bigcirc	Detail 2	\odot	Detail 3	$\overline{\mathbf{v}}$	Detail 4	$\overline{\mathbf{v}}$	Detail 5	\odot	Туре	\odot
			Index 🔸	Detail 1	\odot	Detail 2	$\overline{\bigcirc}$	Detail 3	$\overline{\mathbf{v}}$	Detail 4	$\overline{\mathbf{v}}$	Detail 5	\odot	Туре	$\overline{\mathbf{v}}$
Access	System 🔺 😔			Detail 1	\odot	Detail 2	\bigcirc	Detail 3	$\overline{\bigcirc}$	Detail 4	$\overline{\bigcirc}$	Detail 5	\odot	Туре	\odot
Access	System 🔺 😔 Ground Floor		1	Detail 1	$\overline{\bigcirc}$	Detail 2	\odot	Detail 3		Detail 4	$\overline{\bigcirc}$	Detail 5	$\overline{\mathbf{v}}$	Туре	\bigcirc
Access	System • 😔 Ground Floor Ground Floor		1	Detail 1	$\overline{\bigcirc}$	Detail 2		Detail 3	>	Detail 4	\bigcirc	Detail 5	\odot	Туре	$\overline{\bigcirc}$
Access	System • 🕑 Ground Floor Ground Floor Ground Floor		1 2 3	Detail 1	$\overline{\bigcirc}$	Detail 2	\bigcirc	Detail 3		Detail 4		Detail 5	\bigcirc	Туре	©
Access Y Y Y Y	System • • Ground Floor Ground Floor Ground Floor Ground Floor		1 2 3 4	Detail 1		Detail 2	\bigcirc	Detail 3	 Image: A start of the start of	Detail 4	\bigcirc	Detail 5	 Image: A start of the start of	Туре	
Access	System • • Ground Floor Ground Floor Ground Floor Ground Floor Ground Floor		1 2 3 4 5	Detail 1		Detail 2	\odot	Detail 3		Detail 4		Detail 5	\odot	Туре	©
Access Y Y Y Y Y Y Y Y	System A O		1 2 3 4 5 6	Detail 1		Detail 2	\odot	Detail 3		Detail 4		Detail 5		Туре	
Access Y Y Y Y Y Y Y Y	System A Sys		1 2 3 4 5 6 7	Detail 1		Detail 2		Detail 3		Detail 4	\bigcirc	Detail 5		Туре	

4.17 ACCESS SCHEDULES

Access Schedules is a cost option that is used within TrakaWEB to impose time restrictions on iFobs/items 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 only 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: A best practice would be to keep users and item/iFobs in separate Access Schedules to avoid potential confusion.

4.18 CREATE A NEW ACCESS SCHEDULE

1. From the Navigation Toolbar, click on 'Software Settings', then locate and click on the Access Schedules icon.



2. At the next page, click on the

Create icon

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:

New Access Sch	nedule									traka ASSA ABLOY
Edit										
Access Schedule										
By setting the Star	t Time earlier than	n the Enc	l Time, th	ie sched	ule will (end on t	he followi	ng day.		
Details										
Name:	Night 9	Shift								
Schedule										
Interval:	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Start Time 22:00 😂	End Time	

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 completed, click on P Save & 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.

4.19 APPLYING ACCESS SCHEDULES TO USERS AND IFOB/ITEM RECORDS

- 1. Click on the Access Schedules icon on the Navigation Toolbar.
- 2. Select the Access Schedule you wish to apply to a User or iFob/Item as shown below.

) Aci	ess Schedules	trak ASSA AB
	at Customes	
Sync	Name	•
0	Day Shift	
0	Night Shift	
		*
4		
Page 1	of 1 (2 items) 📧 🔇 1 🔊 🔊	Page size: 20 💌

You will now be taken back to the Access Schedule page, displaying the selected Access Schedule.

Edit Access Schedul	e - Night Shift			tra ASSA A
H P 2				
ccess Schedule Regions	Users	Items	History	
	earlier than the End Tir	me, the schedule will er	d on the following day.	
By setting the Start Time Details Name:	earlier than the End Tir Night Shift	me, the schedule will en	d on the following day.	
Details		me, the schedule will en	d on the following day.	

Selecting the tabs along the top of the page will allow you to control how you wish to apply the Access Schedule.

4.19.1 REGIONS

The Regions tab allows you to select different regions, which will be affected by the selected Access Schedule.



4.19.2 USERS

The Users tab allows you to select individual users that will be affected by the Access Schedule. Selected users will not have access to iFobs/Items outside the specified schedule unless they have been given the Item Access Schedule Override permission.

cess Schedul	e Regions Use	rs Items	History	2		
_	chedules applied to a user will i					
	chedules applied to a user will II and Remove All will take into :			ystem.		
			as an pages.			
System:	Reception					
Select Al	Remove All					
	1			-	\sim -	
	Dave Jones	6042	Sales Manager			
~	John Smith	2946	Production Supervisor			
	Rob		Technical Illustrator			
2	Sarah Brown	1031	HR Manager			
	Steve Adams	13692	Shipping			
	Super Admin					
4						
Page 1 of 1	(6 items) 🛛 🔇 🚺 🔊 🔊				Page size:	20 🔽
PCreate Filte	ž					
Associated L	Jsers					
System		* (\$	Display Name	_		• 🛇
Reception			John Smith Sarah Brown			
Reception			Odidi i Dromin			

4.19.3 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.

ess Schedule	Regions	User	s Items		History						
All users w	vill be restricted :	from accessing	the selected items outsic	de of this	access sche	dule.					
Select All a	and Remove All 1	will take into ad	count any applied filters :	across all	pages.						
Select All	Remove A										
Selected 🛇	System 🔸 😔	Pos. • Inde	x • Description		Detail 1		Detail 2		Detail 3	Detail 4	
	Reception	1	Silver Ford Focus								
	Reception	2	Red Ford Focus		A1		Main Car F	lark			
	Reception	3	Silver Ford Focus		A1		Main Car F	lark			
	Reception	4	Silver Mercedes		A2		Executive Parking				
	Reception	5	Grey Audi		A2		Executive Parking				
	Reception	6	Transit Van 1		B1		Loading B	ay			
	Reception	7	Transit Van 2		B1		Loading B	ay			
	Reception	8									
	Reception	9									
	Reception	10									

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:

Warning		
Item is already assign	ed to the following Access Schedule	es.
Night Shift		
	Ok	

4.19.4 HISTORY

The History tab will display all the recent history of created Access Schedules. An example is shown below:

ss Schedule Regio	ins Users	Items	History		
)ate 👻	Action	Field Name	User	Old Value	New Value
2/11/2016 13:28:34	Modified	End Time	Super Admin	17:00	15:00
2/11/2016 13:28:34	Modified	Start Time	Super Admin	08:00	13:30

4.20 EDITING ACCESS SCHEDULES

2. Once the Access Schedule has been created, Click on P 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.



4.20.1 EDIT USER

- 1. To edit an Access Schedule applied to a user, select the user icon from the Navigation Toolbar.
- 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 Schedule tab located at the top of the screen.

The next screen shows the Access Schedules which are currently applied to that user.

Edit User - Steve Adams	ASSA ABLOY
Edit Customise Export Details System Access Item Access Region Access Access Schedules Web Access History Image: Access schedules applied to this user will restrict access to any items within the associated system. System: Reception Access Schedules Access Schedules Access Schedules Image: Access Schedules Access Schedules Access Schedules Access Schedules Access Schedules Image: Access Schedules Access Schedules Access Schedules Image: Access Schedules Access Schedules Image:	- ©
Access schedules applied to this user will restrict access to any items within the associated system. System: Reception Access Schedules Access Sch	* ©
System: Reception Access Schedules Access Very Name Very Night Shift Day Shift Page 1 of 1 (2 items) Very 2 1 Very 2 20 Page size:	* ©
System: Reception Access Schedules Access Access bild Access Access bild Access	* ©
Access Schedules Access Schedules Image: Access Acces	~ ()
Access Name Image: Access of the second s	• 📎
Image: Night Shift Day Shift Image: Night Shif	- 📎
Image: Night Shift Day Shift Image: Night Shif	- 🕓
Day Shift 4 Page 1 of 1 (2 items) (() () 1 () () () () () () () () () () () () ()	
Image 1 of 1 (2 items) Image 2 image 3	
Page 1 of 1 (2 items) Image 1 Image 1 <thimage 1<="" t<="" td=""><td></td></thimage>	
	Þ
♥ <u>Create Filter</u>	20
and the second and the second and the second s	
Associated Access Schedules	
System 🔹 📀 Access Schedule	• 📀
Reception Night Shift	
Constant Franker (* 1997) 18	Þ
Page 1 of 1 (1 items) 《 《 1 》 》 Page size:	and a second sec
P Create Filter	20 🗾

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.

Details	System Access	Item Access	Region Access	Access Schedules
O Access	schedules applied to this (user will restrict acce	ess to any items within	the associated system.
System:	Reception			
Access Sch	edules			

To select which Access Schedule/s you wish to apply to the user, select one or more boxes as shown in the example below:

Access 🔹 😒	Name
	Night Shift
	Day Shift
4	
Page 1 of 1 (2 items) 🛛 🔇 🔇	3100

4.20.2 EDIT IFOBS/ITEMS

- 1. To edit an Access Schedule applied to an iFob/Item, click on the iFob icon on the Navigation Toolbar.
- 2. At the iFobs page, double click on the description you wish to edit. This will then take you to the Edit iFob page for that specific iFob/item.
- 3. Click on the **Access Schedule** tab located at the top of the screen.

The next screen shows the current 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.

etails	Features	Items	iFob Access	Access Schedules	History	
Access si	thedules applied	to this iFob will restrict	access to any users of th	e system unless the user	has the Item Access Schedul	le Override permission
Access						
	v	Night Shift				
		Day Shift				
4						1
Page 1 of 1	(2 items) 🛛 🔇	3100			Page size:	20 🔽
P Create Filte	<u>ar</u>					

4.20.3 EDITING 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.



1. To adjust the suffix, click on AM or PM and click on the arrow to adjust the increment.



4.20.4 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 the user icon from the Navigation Toolbar.
- 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 Item Access Schedule Override checkbox by scrolling to the right of the screen.
- 5. Place a tick in the check box to enable the permission as shown below.

		No. of Items					Item Access Schedule 🔗 Override
Unlimited		10	None	-	None 🔻		
Unlimited		0			None 🔻		
4							•
Page 1 of 1 (2 it	ems)	() () <u>1</u> ()) (S)			Page size:	20 💟
🕈 <u>Create Filter</u>							

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 in order to get to the required item. For more information, refer to UD0232 TrakaWEB FIFO and Advanced FIFO User Guide.

4.21 TRAKA TOUCH

With an access schedule in place, it will not be possible for users to take items displayed as, voltable 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:

\ 18/10/2018 14:2:	1:27	traka ASSA ABLOY
Traka Admin Held:		
		-
97 27 37 97	S S S S S	10
		Help
		Lookup

If the user clicks on a position, they will see the following message:

* 18/10/2018 14:21:50	traka ASSA ABLOY
Access is denied until 17:00 on Thursday.	
67 67 67 67 67 67 67 67 67 67	10
	Help
	Lookup

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.

4.22 DELETING AN ACCESS SCHEDULE.

- 1. Click on the Access Schedule icon within the Navigation Toolbar.
- 2. Select the Access Schedule you wish to delete and click on **Delete**.

	Edit
Sync	Name
0	Day Shift
	Night Shift
4	
Page 1	of 1 (2 items) 🔣 🔇 🧕 📎 📎
♥ <u>Creat</u>	e Filter

You will then be presented with the following screen asking you to confirm that you wish delete the selected Access Schedule.

3. Click on Delete.

		ess sche	uuier
Day Sh	nift		
Mon	Tue	Wed	Thu
	Mon		Mon Tue Wed

4.23 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

Access Schedules	traka Assa ABLOY
Edit Customise	
Sync Name	-
AM Weekday Shift	
¢	>
Page 1 of 1 (1 items) 🔍 🔇 1 🔊 🔊	Page size: 20
P Create Filter	

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

+ (X 🔍 III 👬		
Sync Name		
AH Waekday Shift		
Page 1 of 1 (1 Rems) (1 (2) (1) (Page size: 20
🅈 <u>Create Filter</u>	Access Schedule Synchronisation Status	
	Sync System -	
	Maintenance Locker	
	Office Keys	
	Page 1 of 1 (2 items) 🔇 🔕 1 🔊 🔊 Page size: 10 🔽	
	▼ <u>Create Filter</u>	

4.24 USB CHARGE STATUS INDICATION

4.24.1.1 USB CHARGE STATUS INDICATION OVERVIEW

This feature can only be used with RFID Locker Systems and is supported from TrakaWEB V2.1.59.1, and 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.**

4.24.1.2 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

Activity 📀	When
Item In but Not On Charge	23/12/2014 13:48:48
Door Closed	23/12/2014 13:26:48
Item On Charge	23/12/2014 13:26:48
Overdue Item Returned	23/12/2014 13:26:47
Item Returned	23/12/2014 13:26:47
Door Opened	23/12/2014 13:26:45
Unidentified Item On Charge	23/12/2014 13:26:27
Item Off Charge	23/12/2014 13:26:13
Item Overdue	23/12/2014 13:25:30
Door Closed	23/12/2014 13:24:50
Unidentified Item On Charge	23/12/2014 13:24:50
Door Opened	23/12/2014 13:24:44
Door Closed	23/12/2014 13:24:32
Item Off Charge	23/12/2014 13:24:32
Item Removed	23/12/2014 13:24:21
Door Opened	23/12/2014 13:24:15
Door Closed	23/12/2014 13:20:49
Item On Charge	23/12/2014 13:20:49
Item Returned	23/12/2014 13:20:38

When 🝷	System 🛇	Position	iFob Description	Activity	Who	Alarm Cleared
23/12/2014 13:26:48	TT Locker	1	iPod 1	Door Closed	Daniel Waters	
23/12/2014 13:26:48	TT Locker	1	iPod 1	Item On Charge	Daniel Waters	
23/12/2014 13:26:47	TT Locker	1	iPod 1	Overdue Item Returned	Daniel Waters	
23/12/2014 13:26:47	TT Locker	1	iPod 1	Item Returned	Daniel Waters	
23/12/2014 13:26:45	TT Locker	1	iPod 1	Door Opened	Daniel Waters	
23/12/2014 13:26:27	TT Locker	1	iPod 1	Unidentified Item On Charge		
23/12/2014 13:26:27	TT Locker	0		USB Charger Redetectable		
23/12/2014 13:26:13	TT Locker	1	iPod 1	Item Off Charge		
23/12/2014 13:26:13	TT Locker	0		USB Charger Undetectable		
23/12/2014 13:25:30	TT Locker		iPod 1	Item Overdue	Daniel Waters	
23/12/2014 13:24:50	TT Locker	1	iPod 1	Door Closed	Daniel Waters	
23/12/2014 13:24:50	TT Locker	1	iPod 1	Unidentified Item On Charge	Daniel Waters	
23/12/2014 13:24:44	TT Locker	1	iPod 1	Door Opened	Daniel Waters	
23/12/2014 13:24:32	TT Locker	1	iPod 1	Door Closed	Daniel Waters	
23/12/2014 13:24:32	TT Locker	1	iPod 1	Item Off Charge	Daniel Waters	
23/12/2014 13:24:21	TT Locker	1	iPod 1	Item Removed	Daniel Waters	
23/12/2014 13:24:15	TT Locker	1	iPod 1	Door Opened	Daniel Waters	
23/12/2014 13:23:06	TT Locker	4	iPod 4	Item In but Not On Charge		
23/12/2014 13:23:00	TT Locker	4	iPod 4	Item In with Charge Fault		
23/12/2014 13:22:59	TT Locker	4	iPod 4	Item On Charge		

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4.25 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 be 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 <u>not</u> 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.

4.25.1 ENROLMENT

- 1. 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.

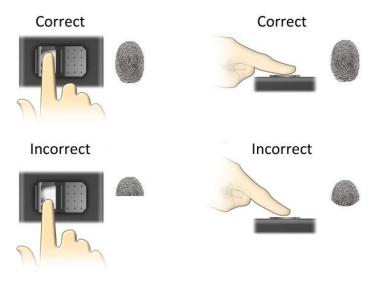
NOTE: You can enrol a maximum of two fingers per user.

- 5. When you wish to continue, click the Enrol button.
- 6. The user will then need to place their finger onto the reader.

		traka
	20 May 2013 09:04:09	ASSA ABLOY
8	User administration	
	Place finder 1 on the reader	
	Errol Finger 1 of 2	
	Errol Finger 1 of 2 Capture 1 of 3 Progress	Details
	Capture 1 of 3	Details Save

7. The progress meter will quickly move to 100% and you will see a fingerprint with a green tick, indicating that the capture was successful. You will need to do this three times for each finger you wish to enrol.

When enrolling, it is important you align your finger to the centre of the Enrolment Module and lay your finger flat to receive accurate results.



Do not move finger when enrolling **Do not** press too hard Place your finger on the enrolment module. **Do not** slide **or** roll finger on and off

NOTE: If your finger is not properly positioned the reader may have trouble enrolling you. If this happens, Traka Touch will prompt you to complete one of following actions to help...



8. If the templates have been successfully captured, the message 'Finger Position OK' will be displayed.



If you chose to enrol two fingers, then you 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.

9. 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.

4.25.2 REMOVING A FINGERPRINT TEMPLATE

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.

◎ ♥ 06/01	3/2020 15:00:43				`aka sa aBLOY
User ad	Iministration	1/18	A	ll Users	
Search:					Add
Forename	Surname		Admin	Reports	-
Restricted	Admin				Edit
Traka	Admin		~		
Authoriser	User 1				Delete
Traka	User 1				
Traka	User 10				
Traka	User 11				Import
Traka	User 12				import
Traka	User 13				Export
Traka	User 14				
Traka	user 15				Exit
			_	_	

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.

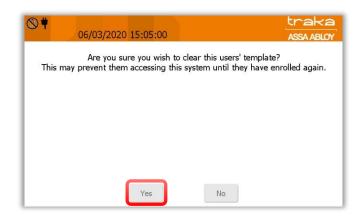
8 #			traka
	06/03/2020 15:04:17		ASSA ABLOY
8	User administration		
	1 Fingers enrolled Enrol 1 fingers	Clear Enrol	
			Details
			Save
			Cancel

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.

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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.

\\$	06/03/2020 15:05:41		traka ASSA ABLOY
8	User administration		
	0 Fingers enrolled		
	Enrol 1 fingers		
		Enrol	Details
			Save
			Cancel

4.25.3 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/Card 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/swipe your Card at the reader.
- 3. Once your Fingerprint ID and/or Keypad ID/Card 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.

5. MULTI-SELECT/MULTI-EDIT (MSME)

5.1 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.

5.2 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 down arrow button 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 Deselect All On Page Deselect All	Select All on Page
Delete Selected	Delete Selected
Set Active on Systems	Set Active on Systems
	Set Inactive on Systems
Set Inactive on Systems	Set Users Active
Set Users Active	Set Users Inactive
Set Users Inactive	Add User Curfew
Add User Curfew	Remove User Curfew
Remove User Curfew	Set User Systems Allowance
Set User Systems Allowance	🔲 🥚 Traka User 09

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.

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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.

5.2.1 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 toolbar, 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 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 <u>Add Users</u>.

	Display Name 🔹 📀	Staff Number 😔	Job Role 🔍			Mobile	
۲	Office Manager	2345	Office Manager	01234 456765			
۲	Production Manager	0987	Production Manager	01234 456567			
۲	Standard User 1	4567	Standard User				
۲	Standard User 10	8765	Standard User				

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

	-	Traka Administrator	1234	Administrator	01234 123123	
	۲	Office Manager	2345	Office Manager	01234 456765	
		Production Manager	0987	Production Manager	01234 456567	
V		Training Manager	3456	Training Manager	01234 345345	
~		Vehicle Manager	5432	Vehicle Manager	01234 789987	
	۲	Standard User 1	4567	Standard User		
	0	Standard User 10	8765	Standard User		

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. This could potentially lead to a situation where they may be accidentally deleted.

5.2.2 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.

	-	Traka Administrator	1234	Administrator	01234 123123	
	۲	Office Manager	2345	Office Manager	01234 456765	
v		Production Manager	0987	Production Manager	01234 456567	
~		Training Manager	3456	Training Manager	01234 345345	
V		Vehicle Manager	5432	Vehicle Manager	01234 789987	
	۲	Standard User 1	4567	Standard User		
		Standard User 10	8765	Standard User		

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.



5.2.3 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.

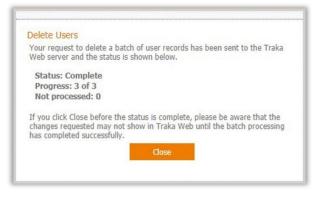
1. To delete the selected users, right click and then choose the option for **Delete Selected.**



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.

Delete Users			
Are you sure y	you want to delete 4 use	rs?	
	Yes	No	

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.



5.2.4 SETTING USERS ACTIVE ON A SYSTEM

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.

	Sup	er Admin	1345
٠	Tral	ka Admin	9945
	Tra	ca HR Manager	4543
۲	Tra	Select All on Page	
	Tra	Deselect All On Page	
•	Tra	Deselect All	
	Tra	Delete Selected	
	Tra	Set Active on Systems	
	Tra	Set Inactive on Systems	
٠	Tra	Set Users Active	
	Tra	Set Users Inactive	
٠	Tra	Add User Curfew	
۲	Tra	Remove User Curfew	
٠	Tra	Set User Systems Allowand	ce
٠	Tral	ka User 14	2967
	Tra	ka User 15	3554

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

		4
	Garage	
	Main Office	
	Office 1	
	Office 2	
	Production	
	Reception	
6		
Page 1 o	1 (6 Rems) 💿 🕄 🔟 💿 💿	Page size: 20
Create	Fite	
	Continue Close	

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

		7
~	Garage	
	Main Office	
	Office 1	
	Office 2	
~	Production	
2	Reception	
< Page 1 o	f 1 (6 items) 🔇 🔇 🗓 🔊 😒	Page size: 20 🛃
Treate	Filter	
	Continue Close	

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.

Set Users Active	e on Systems		
Are you sure you	want to set 1 users a	ctive on the chosen system	is?
, ac you build you		care on are chosen system	
	Yes	No	

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 as can be seen in the example below.

Sync	Effective 📀	System 🔺 🖂	Region 🛇	Active 📀	Admin 📀	Reports 🛇	No. of Items
3100 M		Garage	Region 1	~			0
•		Main Office	Region 2				0
•		Office 1	Region 3				0
•		Office 2	Region 3				0
1. Con		Production	Region 1	~			0
14		Reception	Region 2	~			0

5.2.5 SETTING USERS INACTIVE ON A SYSTEM

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.

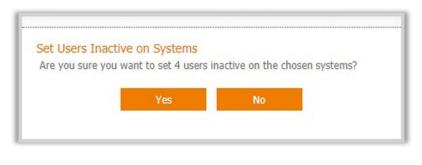


A window will now appear displaying all the available systems.

2. Select which systems you wish to set as inactive to the users.

		٩
~	Garage	
	Main Office	
2	Office 1	
~	Office 2	
2	Production	
2	Reception	
↓ Page 1 o	f 1 (6 items) 🛞 🔇 1 📎 🔊	Page size: 20
P Create	Filter	

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.



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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.



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.

NOTE: In the example above all four users were not assigned to any of the three available regions, therefore the `Not Processed' result is `12'.

5.2.6 SETTING 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.

Edit		Customise	All Regio Rec	
4	Sync	Display Name	Staff Number 🔍	Job Rok
	0	Super Admin	1234	Super A
		Super Admin	1345	Super A
Z		Traka Admin	9945	Traka Ad
		Traka HR Manager	4543	HR Mana
~	۲	Traka IT Manager	3542	IT Mana
	0	Traka Marketing Manager	2276	Marketin
	•	Traka Sales Manager	1095	Sales Ma

2. Right click and choose Set Users Active from the context menu.



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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.

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

Set Users Activ	/e		
Are you sure you	u want to set 4 users a	active?	
	Yes	No	

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 U	Isers Active
	request to set a batch of users active has been sent to the Traka Web r and the status is shown below.
Sta	tus: Complete
Pro	gress: 4 of 4
Not	processed: 0
chang	I click Close before the status is complete, please be aware that the ges requested may not show in Traka Web until the batch processing ompleted successfully.
	Close

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.

5.2.7 SETTING 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.

⊘ 4	Sync	Display Name	Staff Number 📀	Job R
	0	Standard User 4	7890	Stand
V		Standard User 5	8909	Stand
V		Standard User 6	9098	Stand
V		Standard User 7	1029	Stand
~		Standard User 8	1928	Stand
	۲	Standard User 9	1827	Stand

2. Right click and choose **Set Users Inactive** from the context menu.

the second secon		Customise	▶ 🗊 🏂 🛇 (Export
4	Sync	Display Name	Staff Number 🔗
		Super Admin	1234
~		Select All on Page	345
		Deselect All On Page	945
~		Deselect All	543
~		Delete Selected	542
	۲	Set Active on Systems	276
	۲	Set Inactive on Systems	095
	•	Set Users Active	976
		Set Users Inactive	843
	•	Add User Curfew	697
	0	Remove User Curfew	447
	•	Set User Systems Allowance	939
		Traka User 11	7685
		Traka User 12	9078

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.

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

Set Users Inact	ive		
Are you sure you	want to set 4 users	inactive?	
	Yes	No	
	res	NO	

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.

	rs Inactive
	uest to set a batch of users inactive has been sent to the Traka ver and the status is shown below.
Status	: Complete
Progre	ess: 4 of 4
Not pr	rocessed: 0
changes	ick Close before the status is complete, please be aware that the requested may not show in Traka Web until the batch processing pleted successfully.
	Close

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.

5.2.8 ADD USER CURFEW

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.

Ed		Customise	Export	All Re g R
3	Sync	Display Name	Staff Number 🛛 👽	Job R
		Super Admin	1234	Super
		Super Admin	1345	Super
		Traka Admin	9945	Traka
✓		Traka HR Manager	4543	HR Ma
		Traka IT Manager	3542	IT Mar
		Traka Marketing Manager	2276	Marke

2. Right click and select **Add User Curfew** from the context menu.

Edit		Customise	Exp
3	Sync	Display Name	Staff Nurr
	•	Super Admin	1234
		Select All on Page	1345
V		Deselect All On Page	9945
_		Deselect All	4543
	۲	Delete Selected	3542
	•	Set Active on Systems	2276
		Set Inactive on Systems	1095
	•	Set Users Active	9976
	•	Set Users Inactive	8843
		Add User Curfew	0697
	•	Remove User Curfew	5447
	0	Set User Systems Allowance	2939
		Traka User 11	7685

3. A window will now appear. You can now select the system, the region and the type of curfew that you wish to apply.

	Man Office	Default	Ŷ		
2	Main Office	Default		None	
				None	
Page 1 of 1 (1	1 terns) 🔞 🕄 🚺 🙆 🗭			Absolute Relative	Page size: 20

4. Select Continue to progress with adding the curfew information.

For an **Absolute** curfew, use the arrows to enter the required hours and minutes.



For a **Relative** Curfew, use the arrows to enter the required days, hours and minutes.

Relative	✓ Days:	0 🔶 Hour:	0 🔶 Minute:

5. 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.

6. 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.

5.2.9 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.

Edit		Customise	K 🗾 🎽 ⊘ (Export	All Reg
3	Sync	Display Name	Staff Number	Job R
	۲	Super Admin	1234	Super
		Super Admin	1345	Supe
V		Traka Admin	9945	Traka
		Traka HR Manager		HR M
	۲	Traka IT Manager	3542	IT Ma
	•	Traka Marketing Manager	2276	Marke

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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.

	Reception	\$	Default	Ŷ		
2	Reception		Default		None	
< Page 1 of 1	(1 tems) 33)			Page size:	20
	e] Equals 'Reception' And [Region] Equals 'Default'				Cle

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.

Remove Curfew f	rom User		
Remove currew in	Torn Osci		
Are you sure you wa	int to remove the	curfew from 3 users?	

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.



5.2.10 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.

Edit		Custom	T] 🔀	Export	(All Regions)	6	All Syster () (All Syster	ns) tem
0	Sync	Display Name	\odot	Staff Number 📀	Default First Floor Ground Floor		\odot	Fax
	0	Super Admin		1234	Super Admin	01234 1	.23456	

2. Select the user or users that you wish to set the User Systems Allowance.

Edit		DII H T	Export (⊘ (All Re gio Re
5	Sync	Display Name	Staff Number 📀	Job Role
		Super Admin	1234	Super Adm
	•	Super Admin	1345	Super Adm
V		Traka Admin	9945	Traka Admi
~		Traka HR Manager	4543	HR Manage
	•	Traka IT Manager	3542	IT Manager
V		Traka Marketing Manager	2276	Marketing M
Z	•	Traka Sales Manager	1095	Sales Manag
	•	Traka User 06	9976	Traka User
V		Traka User 07	8843	Traka User
		Traka User 08	0697	Traka User
	•	Traka User 09	5447	Traka User

3. Right click within the grid and select Set Users Systems Allowance from the context menu.



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

		Ÿ	1	,
M	Reception		Default	System Default
< Page 1 of 1 Create Fito	(1 items) 🔇 🔇 <u>1</u> 🔊 🔊			

5. 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.

Image: System Default Default System Default Unlimited 1			Allowance	
System Default ^ Unlimited 1	9	7		
Unimited 1	Default		System Default	
2			Unlimited	^
3 Continue Close 4	_	_		

6. Now Select the **Continue** button.

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

7. Select **Yes** to continue.

Set Systems Allowa	ance for Users		
Are you sure you want	to set a system a	allowance for 5 users?	
1750 15			
	Yes	No	

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

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



The selected users will now be granted the specified item allowance for the selected system(s) for that particular region.

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5.3 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.

5.3.1 THE CONTEXT MENU

The functionality of the Context Menu is made available by right clicking the mouse within the grid or left clicking on the down arrow button above 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	6	2		~
Deselect All On Page	0	Seect Al		
		Select	All On Page	
Deselect All		Deselect	All	
Add All Filtered Users to Item Access Group		Add All Filtered Users to Item Access Group Remove All Filtered Users from Item Access Group		
Remove All Filtered Users from Item Access Group		1		Item Access Group
Add Selected Users to Item Access Group		Remove	Selected Use	rs from Item Access Group
		-		Office Manager
Remove Selected Users from Item Access Group				Production Manager

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.

2345

1234 2345 2345

5.3.2 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 <u>Item Access Groups</u> section.

1. From the Navigation Toolbar, select the Item Access Groups icon from the Items option.



You will then be taken to the Item Access Groups page, showing a list of existing groups.

Edi	t Customise
Name	
Group 1	
Group 2	
Group 3	
l	
Page 1 of	1 (3 items) 🔣 🔇 📘 🔊 🔊

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.

5.3.3 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.

etails		Region	Item Access	Users	Hist	огу	0	
0	Sync	Member	Display Name	Staff Number 🕑	Job Role 📀	tel 🕑	Fax 📀	Mobile
	۲		Standard User 3	1234	Standard User			
	۲		Super Admin					
	٠		Traka Administrator	1234	Administr	01234 123123		
	•		Office Manager	2345	Office Manager	01234 456765		
	٠		Production Manager	0987	Production Manager	01234 456567		
	۲		Training Manager	3456	Training Manager	01234 345345		
	۲		Vehicle Manager	5432	Vehicle Manager	01234 789987		
	۲		Standard User 1	4567	Standard User			
	•		Standard User 10	6543	Standard User			

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.

etails		Region	Item Access	Users	Hist	ory			
4	Sync	Member	Display Name	Staff Number 🕑	Job Role 📀	Tel 📀	Fax	\odot	Mobi
					Standard User				
	۲		Super Admin						
v	٠		Traka Administrator	1234	Administr	01234 123123			
					Office Manager	01234 456765			
					Production Manager	01234 456567			
	۲		Training Manager	3456	Training Manager	01234 345345			
	•		Vehicle Manager	5432	Vehicle	01234			

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

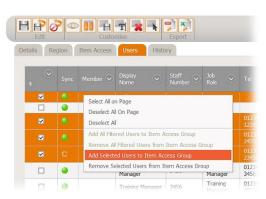
3. If you wish to select all the users on the page, right click and choose Select All on Page.

H P C	20	Customise					Edit	2	Custo	mise Export			
etails Re	egion	Item Access Users History				Detal	ls Re	gion	Item Access	Users History			
0	Sync	Member 🕑 Display Name	Staff Number	Job Role		12	۲	Sync	Member 📀	Display Name	Staff Number 🕑	Job Role 🕑	Tel 💌
	•	The second se	7393	-									
		Select Al on Page			_								
	•	Deselect Al On Page Deselect Al		Administr									
	•	Add All Filtered Users to Item Access Gro	up	Office Manager	_							Office Manager	01234 243546
	•	Remove All Filtered Users from Item Acc Add Selected Users to Item Access Grou		Office Manager								Office Manager	
	•	Remove Selected Users from Item Acces		Production Manager								Production Manager	
	•	Training Manager	3456	Training Manager								Training	

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**.

5.3.4 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.

2. Click on **Yes** to proceed.

Add Users to Item	Access Group		
Are you sure you war	nt to add 4 users I	to this item access	group?
	Yes	No	

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.

Add L	Jsers to Item Access Group
	equest to add a batch of users to this item access group has been sen Traka Web server and the status is shown below.
Stat	us: Complete
Prog	press: 4 of 4
Not	processed: 0
chang	click Close before the status is complete, please be aware that the es requested may not show in Traka Web until the batch processing impleted successfully.

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

Edit Customise								
Details Region Item Access Users History								
	0	Sync	Member 📀	Display Name	Staff Number 🕑	Job Role 📀		
		۲	1	Office Manager	2345			
		۲		Super Admin				
		۲	1	Traka Admin	1234	Administr		
		۲	1	Office Manager	2345	Office Manager		
		۲	1	Office Manager	2345	Office Manager		
				Production Manager	3456	Production Manager		
		٠		Training Manager	3456	Training Manager		

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

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

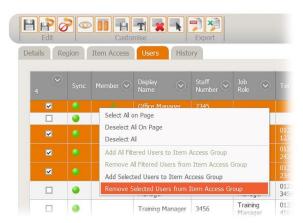
5.3.5 REMOVE USERS FROM ITEM ACCESS GROUP

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.

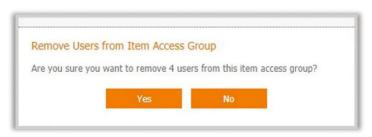


3. Right click and choose the option Remove Selected Users from Item Access Group.



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.

4. 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.



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.

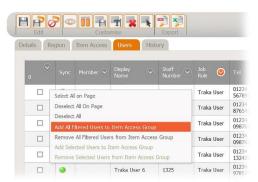
5.3.6 USING THE FILTERING OPTION

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 Traka User is used.

		Display Name	Staff Number 🕑	Job Role 🥑	
۲	0.01 ° 1 6 1 6 1 6 1 7 9	Traka User 1	5678	Traka User	0123 5678
٠		Traka User 2	5678	Traka User	012 876
۲		Traka User 3	5432	Traka User	012 098
٠		Traka User 4	6543	Traka User	0123 0983
۲		Traka User 5	1324	Traka User	0123 1324
•		Traka User 6	1325	Traka User	012 978
۲		Traka User 7	0192	Traka User	0123
		Traka User 8	2938	Traka User	0123

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



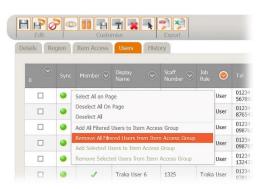
The process for adding will now proceed according to the process used for **Add Selected Users to Item Access Group.**

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

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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.

5.4 SELECTING ITEMS TO ASSIGN TO ITEM ACCESS GROUPS

Once the users are assigned to Item Access Groups, it is possible to assign Items in a similar way.

5.4.1 THE CONTEXT MENU

The functionality of the Context Menu is made available by right clicking the mouse within the grid or left clicking on the down arrow button above 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 items have been selected.

0	Select All on Pa	ige		g Detai
	Deselect All On Deselect All	Page		
	Remove Select	ad Item(s) from	group	-
	Revoke All			
		Home System	5	
		Home System	6	
		Deselect All Add Selected II Remove Select Grant All	Add Selected Item(s) to group Remove Selected Item(s) from Grant All Revoke All Home System	Deselect All Add Selected Item(s) to group Remove Selected Item(s) from group Grant All Revoke All Home 5 Home 6

Select All on Page

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

Deselect All on Page

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

Deselect All

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

Add Selected Item(S) to group

With one or more items selected, this option will enable them to be added to the group.

Remove Selected Item(S) from group

With one or more previously assigned items selected, this option will enable you to remove them from the group.

Grant All

This option will enable you to grant access to all items

<u>Revoke All</u>

This option will enable you revoke access to all items in the group.

5.4.2 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 assigning items can be found in the <u>Item Access Groups</u> section.

1. From the Navigation Toolbar, select the Item Access Groups icon from the Items option.



t Content of the second	Customise
Name	
Group 1	
Group 2	
Group 3	
4	
Page 1 of 1 (3 items)	@ (]) »

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 for the selected group.

3. Select the **Item Access** tab.

The next page will display a list of the items in the system.

4. Select individual items to assign to the Group by clicking on the check boxes to the left.

Edit		Customise		Exp(ort	
4	Access 📀	System - 😔	Pos. +	Tag No	Detai 1	\odot
		Home System	2			
Z		Home System	3			
Z		Home System				
		Home System	6			
		Home System	7			

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

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

dit Region	Customise Customise Item Access Users History	Edit Customise Expo Details Region Tem Access Users History
Acce	ass 🛇 System * 🕑 Pos. * Tag Detail 1 😒 D	Access System + System + Pos. + Tag
~	Home 1 System 1	Home 1
9	Select All on Page	Home 2
	Deselect All On Page	System 2 Home 3
	Deselect All	System
	Add Selected Item(s) to group	V Home 4 System 4
	Grant All	Home 5
	Revoke All	Home 6
8	System	Home

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

5.4.3 ADD SELECTED ITEM(S) TO GROUP

1. With the items selected, right click and select **Add Selected Item(s) to Group.**



You will be presented with a confirmation window asking if you wish to grant access to the selected items. Selecting **No**, will return you to the list of user details.

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

to the selected items.

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



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 page will now be updated. A tick is visible in the Access column for all access granted items in that group.

5.4.4 REMOVE SELECTED ITEM(S) FROM GROUP

As well as granting access to items for the selected group, it may also be necessary to remove access to one or more items from a selected group.

1. Select the Item(s) from which you wish to remove access, then right click within the grid, and choose **Remove Selected Item(s) from group.**



You will be presented with a confirmation window asking if you wish to revoke access to the selected items. Selecting **No**, will return you to the user details list.

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

Revoke access	to the selected iter	ns	
Are you sure you	want to revoke acc	ess to the selected it	ems.
	Yes	No	

A window will appear displaying the progress and status. Once completed, click on the **Close** button. If the process was successful, the selected items will have their access revoked.

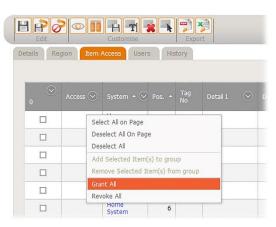


NOTE: Clicking on Close before the status is complete will not cancel the operation. The batch process will continue to run, and any changes will not be displayed until the process has completed.

5.4.5 GRANT ALL

Selecting the Grant All option from the context menu will grant access to all items in the selected group.

1. Right click within the grid and select **Grant All** from the context menu.



A message will appear requesting confirmation that you wish to grant access to all items.

2. Click on **Yes** to continue.

Grant access to al	items		
Are you sure you w	ant to grant acce	ss to all items	

A window will appear displaying the progress and status. Once completed, click on the **Close** button. If the process was successful, all the items in the system will be granted access.



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 display until the process has completed.

Once completed, a green tick will display in the Access column next to every item listed in the system.

Edit		Customise Access User		Expo	ort
0	Access 📀	System 🗕 🖂	Pos. 🔺	Tag No	Detai
	1	Home System	1		
	1	Home System	2		
	1	Home System	3		
	1	Home System	4		
	1	Home System	5		
	1	Home System	6		
_		Home	-		

5.4.6 REVOKE ALL

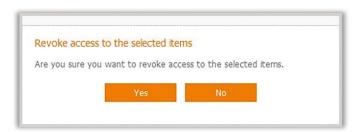
It is possible to revoke access to all items that have access granted to them by selecting the Revoke All option from the context menu.

1. Right click within the grid and choose **Revoke All** from the context menu.

Edit	201	Customise		xport
Details F		n Access User		
0)System 🔶	Pos. • Tag No	' Detail 1 🕑
	✓ se	Home elect All on Page		
	J D	eselect All On Pag	e	
	1	eselect All		
		dd Selected Itemi emove Selected II		oup
	J Gi	rant All		
	R	evoke All		
	1	System	6	
	1	Home System	7	

A message will appear requesting confirmation that you wish to revoke access to all items in the group.

2. Click on **Yes** to continue.



A window will appear displaying the progress and status. Once completed, click on the **Close** button. If the process was successful, all the items in the system will have their access revoked.

Revok	e access to the selected items
	quest to revoke access to the selected items has been sent to the Veb server and the status is shown below.
Status	s: Complete
Progr	ess: 5 of 5
Not pr	rocessed: 0
change	lick Close before the status is complete, please be aware that the s requested may not show in Traka Web until the batch processing npleted successfully.
	Close

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 display until the process has completed.

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 setup 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 check the Fault Logging section. Here you will find the option to set fault logging ON or OFF by default for all iFobs/items in the system.

NOTE: This default can still be overridden on an individual iFob/item basis.

Fault Logging System Default On Return	
The second s	
	~
Off	
On Return Reason Logging	
System Default Off	~
Notes Logging System Default Off	~
Custom Messages	
System Default Off	~

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, set all iFobs/items to OFF if the Admin App is set to default: OFF. The table shows configurations for most scenarios:

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'

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' from the Ribbon Toolbar.
- 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 <u>Adding an Item to an iFob</u> for more details.

🕥 ? 🚺 🛇 English (UK)	You have 47 days left to use Traka Web	Super Admin Log Off traka.com
Edit Item - A1 Main Ca	r Park	traka
	TUR	ASSA ABLOY
Details Features	History	
Reason Logging		
Custom Message		
Notes Logging		
Fuel Logging		
Mode: Fuel Level (%):	Forced On for Return System Default (On for Return) Forced Off	
Distance Logging	Forced On for Return	
Location Logging		
Curfew		

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 <u>Fault Logging Software Permissions</u> section for more details.

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1. To create a Fault Definition, select 'Software Settings>Fault Definitions' from the Navigation Toolbar.



2. Click the 'Add' button and the Fault Definition Details window will appear. From here, you can define a name and any additional descriptions for the fault.

• •	English (UK)		John Brown Log Off traka.com
.o L Fault De	efinitions		traka
	ennicions		ASSA ABLC
dit 🕹	Customise	Export	
Critical	Fault	• 🕑 Fault Description	\odot
		No data to display	
4			•
No data to pagi	nate 🔇 🔇 🔊 🕥		Page size: 20

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 <u>Define Users</u> <u>That Can Take Critically Faulted Items</u> for further details.

The following two images show examples for the creation of Critical and non-critical Fault Definitions.

🛛 🕥 🕐 🧊 🖉 English (UK)		John Brown Log Off traka.com
Provident Contemporation		traka
		ASSA ABLOY
HPZ		
Edit		
Fault Definition History		
Critical Fault:		
Fault: Fault Description:	Brakes	
Fault Description:	Check brake efficiency	
		h
🕥 ? () 🛇 English (U	к)	John Brown Log Off traka.com
		traka
<a>O Image: O <		
New Fault Definitio		traka
		traka
New Fault Definitio		traka
New Fault Definitio		traka
Rew Fault Definition	n Paintwork	traka
New Fault Definition	n 	traka
Rew Fault Definition	n Paintwork	traka
Rew Fault Definition	n Paintwork	traka
Rew Fault Definition	n Paintwork	traka
Rew Fault Definition	n Paintwork	traka
Rew Fault Definition	n Paintwork	traka

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 <u>Selecting Fault Definitions for Item Types</u> for more details.

All the Fault Definitions created will be stored in the Fault Definitions List. To access the Fault Definition List, select 'Software Settings>Fault Definitions' from the Navigation Toolbar.

M
<i>™</i> °
E Î
₽ Î
123
٢

From here, you can Edit, Delete, or Add new Fault Definitions.

Fault Defi	hitions	tr Ass	
+ (🗙	Cartannan Esport		
Critical Fault	Short Description + 😒	Description	
1	Steering Fault	Check steering wheel play, and wheel/steering wheel alignment.	_
12	Brakes faulty	Check brake efficiency	
192	Key stuck in barrel		
	Spare tyre condition	Check spare	
£			
		Page size: 2	

NOTE: If a user has removed an item from the system that has a 'normal' 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 <u>Outstanding Faults List</u>.

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 <u>Item</u> <u>Type</u>. Up to 20 Fault Definitions can be assigned to a single Item Type.

1. Select 'Software Settings' and then 'Item Types' from the Navigation Toolbar.



- 2. Select the desired Item Type and click 'Edit' from the Ribbon Toolbar.
- 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.

Edit Item T	ype - Key			tra Assa
HPZ		×]		
Edit	Customise Exp			
Туре	Faults	History		
			Sec. 1999 (54) (1)	
Critical	Fault		On Return	
Critical	Fault Brakes		On Return	
		- <u>·</u>		
	Brakes	•		

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 <u>Show/Hide Grid Columns</u> 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 <u>Navigation Toolbar</u>.
- 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 will be a Fault Logging Admin column. Tick the box in this column against the corresponding system(s) for which you wish the user to have Fault Logging Admin permissions.

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).

	System Acces	Item Acc	ess R	egion Access	Web Ac	cess	History			
System Acces	s									
Card ID:				Active:			•			
Keypad ID: Enrollment ID: PIN: PIN Expiry Date:		1971		Start Date: Expiry Date: Authoriser: Permit Expiry Date:			18/02/2016 18/02/2066 19 19/02/2046 19 19/02/2046 19			
		19/03/2016								
PIN Force Chan	ige:									
Fingers Enrolled	1:	0								
Sync	Effective 😔	System 🔺 🖂	Region 🕑	Active 📀	Admin 📀	Reports 🖓	Fault Logging 🔗 Admin	Allowance	\odot	No. of Ite
Sync	Effective 📀	System • 🕑 system 1	Region 📀 Default	Active 🛇	Admin 😔	Reports 🖓	Logging (🗸)	Allowance Unlimited	 ✓ 	No. of Ite
27 							Logging 🕑 Admin			No. of Ite

NOTE: If a user, who has the Fault Logging Override 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. Refer to section <u>4.1.13 'Creating Faults Using TrakaWEB'</u> 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:

	™ traka 22/02/2016 11:18:22 ASSA ABLOY
ł	
	Pos 1: Red Ford Focus
	Does this item have any faults?
	Yes No

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:

C		traka ASSA ABLOY
•	Pos 1: Red Ford Focus Please select the fault(s) for this item:	
	Fault	
	Brakes	
	Rust	
	Steering	
	Door Lock	
	Paintwork	
	Continue	Help

A list of the predefined <u>Fault Definitions</u> 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 <u>preselected fault</u> 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.

8)	tr	aka
	22/02/2016 12:23:59	ASS	AABLOY
4	Pos 1: Red Ford Focus		
	Please select the fault(s) for this item:		8
	Fault		
	Brakes	0	
	Rust		
	Steering		
	Door Lock	۲	
	Paintwork		
	Continue Cancel		Help

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 <u>Fault Logging Admin</u> 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:

C		raka SA ABLOY
•	No. 10 Across Ac	
	Pos 1: Red Ford Focus has critical faults.	
	Please acknowledge these item faults by clicking 'Continue' below	8
	Fault	
	Brakes 🧭	
L.	Door Lock	
	Continue	Help

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 <u>Enabling Fault Logging</u> 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.

22/02/2016 13:54:14	tra ASSA/	
Pos 1: Red Ford Focus Please select the fault(s) for this item:		
Fault		
Brakes	۲	
Rust		
Steering		_
Door Lock	۲	
Paintwork		
Continue Cancel	ŀ	lelp

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:

♥ 22/02/2016 1	4:07:46	traka ASSA ABLOY
?		
	Fault 🌔	
	Critical Fault	
	New Faults	
	Cleared Faults	
	Ok	

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.

22	2/02/	2016	14:16	5:43								raka ssa ablov
Z			F		Pos :	1: Red	Ford F	'Brakes ocus r notes	400 835	:		
Faulty	orake li	ne repla					•					<u> </u>
	1	2	3	4	5	6	7	8	9	0		*
12?	1 Q	2 W	³ E	4 R	5 T	6 Y	7 U	8 I	9 0	0 P	+	
12? (A)	1 Q © A			4 R S F							+	Apply All
	e	• •	<u> </u>	s	T	Y &	U ° J					Apply All Continue Cancel

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:

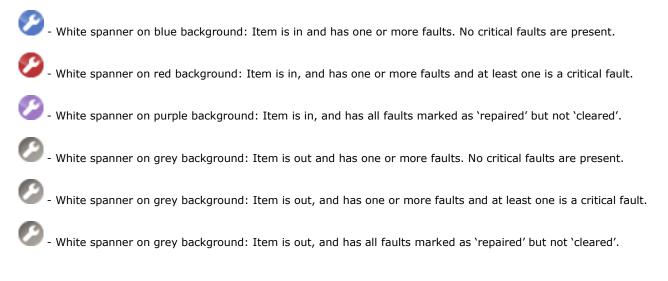
	19/08	/2015 09:19	9.42						tra	aka
	A A	DMIN EXTR eld: 2, 31, 32,		85, 37, 3	9, 40				ASSA	ABLOY
	•	2 3	•	57	S	V	ď	9	102	
		12 13	14	15	16	179	18	197	207	
	21	22 23	249	25'	26	27	28	29	307	Menu
	319	32 33	349	359	36	37	38	39	109	Help
				_	_	_		_	_	Lookup
Position 1: 🐨 - Iter	n in with or	ne or more	critical	faults						
Position 2: 2 - Iter	m in with oi	ne or more	non-cri	itical fa	aults					
Position 3: 🕜 - Iter	m held with	one or mo	re critio	al fau	lts					
Position 4: 🔮 - Iter	m held with	no faults								
Position 5: 🞯 - Iter	m in with no	o 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.

O System Viewer
Region B Cabinet B Region System
Cabinet B Status: O 03/03/2016 15:57:45 Disconnected
1 KR59 KWB Status: 🝚
Previous user: ADMIN EXTR 146 - new Outstanding Faults: 129 - Steering Fault 128 - Brakes faulty

The Icons and their meanings are shown below:



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>Outstanding Faults' from the Navigation Toolbar.



	stomise		Export							
	Fault ID	System 😔		Description 📀	Critical	Fault	\odot	Repaired	Logged By	\odot
22/02/2016 13:38:14	56	Admin System	1	Red Ford Focus		Door Lock			Super Admin	
22/02/2016 13:38:14	55	Admin System	1	Red Ford Focus	\checkmark	Brakes			Super Admin	
19/02/2016 15:24:19	33	Admin system	2			Brakes		~	Super Admin	

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 <u>Show/Hide Grid Columns</u> 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' from the Navigation Toolbar and then select 'Fault Report'.

Reports	trak ASSA ABL
	ASSA ABL
> General	
> Status	
Exceptions	
Permissions	
Regions	
Faults	
Fault Report	
▶ Reasons	
Utilisation	
Diagnostics	

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

0	Customise			F resh	22/01/2016 15:10 Start D	ate	[©] 22/0	12/2016		Date	ASSA AB
	Date Logged 🔹	Fault ID	System 😔	Pos.	Description	Critical	Fault	\odot	Cleared	Repaired	Logged By
3	22/02/2016 13:38:14	56	Admin System	1	Red Ford Focus		Door Lock				Super Admin
	Repaired:		Central loc	king iss		Cleared:					h
3	22/02/2016 13:38:14	55	Admin System	1	Red Ford Focus		Brakes				Super Admin
3	22/02/2016 09:35:26	54	Admin System	1	Red Ford Focus		Door Lock		~		Super Admin
9	22/02/2016 09:35:26	53	Admin System	1	Red Ford Focus	V	Brakes		\checkmark		Super Admin
	22/02/2016 09:10:28	52	Admin System	1	Red Ford Focus	\checkmark	Fault		~		Super Admin
9		51	Admin System	2	Silver Ford Focus		Brakes		\checkmark		Super Admin
	19/02/2016 16:40 <mark>:</mark> 53	51			Silver Ford Focus		33		~		Super Admin
9	19/02/2016 16:40:53 19/02/2016 16:37:33	50	Admin System	2							Super
9		(cations		2	Silver Ford Focus	V	Fault		1 V		Admin
0	19/02/2016 16:37:33	50	System Admin		Silver Ford Focus Silver Ford Focus	N N	Fault Brakes		~		Admin Super Admin
	19/02/2016 16:37:33 19/02/2016 16:37:33	50 49	System Admin System Admin	2							Admin Super

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 <u>Fault Logging Software Permissions</u> 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>Outstanding Faults' from the Navigation Toolbar.
- 2. Click the 'Add' button in the <u>Ribbon Toolbar</u>.
- 3. Using the dropdown boxes in the Item window, select the <u>Region</u>, 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 window. Select the fault you wish to add from the list.

I P Z		
Edit tstanding Fault		
(a) Item		
Region:	Default 💌	
System:	Admin System	
Item:	3: Ford Fiesta	
🛞 Item Details		
🙆 Outstanding Fault		
Date Logged:	22/02/2016 15:41	
Logged By:	Super Admin	
Fault:	Paintwork	
Critical Fault:		
Fault Description: Paintwork Scratched		
⊘ Progress		

- 4. Enter any fault/repair notes in the Notes field under the 'Progress' section.
- 5. Once complete, click 'Save' from the Ribbon Toolbar.

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>Outstanding Faults' from the <u>Navigation Toolbar</u>.
- 2. Highlight the desired fault and click 'Edit' from the <u>Ribbon Toolbar</u>. A window will appear displaying various details for the selected Fault.

un outstanding rat	ılt - Brakes	AS
₽∂		
Edit		
standing Fault History		
Outstanding Fault		
Fault ID:	55	
Date Logged:	22/02/2016 13:38	
Fault Record Created:	22/02/2016 13:38	
Fault:	Brakes	
Critical Fault:		
Fault Description: Check brake efficiency		
System:	Rob's System Red Ford Forus	
System: Item:	Red Ford Focus	
System:	Red Ford Focus	
System: Item:	Red Ford Focus	
System: Item: ⓒ Item Details - Red Ford Fr	Red Ford Focus	
System: Item: ⓒ Item Details - Red Ford Fr	Red Ford Focus	
System: Item: ⓒ Item Details - Red Ford Fr	Red Ford Focus	

3. Expanding the Progress sections 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 <u>icon in the System Viewer</u> 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 <u>icon in the System Viewer</u> will show no faults. The fault record will still be visible in the Fault Report.

Repaired:	*
Date Repaired:	19/02/2016 00:00
Cleared:	8
Date Cleared:	19/02/2016 00:00
Notes:	
Brake pads replaced a	and fluid levels have been checked.

This Document is uncontrolled when printed unless over stamped "CONTROLLED DOCUMENT"

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 <u>Fault Logging Software</u> <u>Permissions</u> 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 <u>section 5.6.</u>

6.2.16 FAULT LOGGING SOFTWARE PERMISSIONS

To enable a user to create, edit and delete <u>Fault Definitions</u>, or to create/edit and repair/clear faults, they must be given the correct software permissions.

1. Select 'Software Settings>Software Permissions Groups' from the <u>Navigation Toolbar</u>.

A
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<u>I</u>
٥

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 'Add' button.

o Software Permissions Groups	traka Assa ABLO
Export Customise	Region
Group Name	
Group Name NoOutstandingFaults	*
	•
NoOutstandingFaults	•
NoOutstandingFaults Permission groups - Rob	Page size: 20 🔽

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.

🖨 🔳 Pages
🖨 🔳 Items
– 🗌 Create
– 🗌 Delete
– 🗌 Edit
Outstanding Faults
- 🗌 Create
🖨 🗹 Edit
- 🗹 Clear Faults
Repair Faults
e iFobs
– 🗌 Delete

- 5. To assign users to the Software Permissions Groups select 'Users' from the Navigation Toolbar.
- 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' from the Ribbon Toolbar.

Edit User - Super A	dmin				rak SSA AB
HPZ					
Edit Details System Ad	ccess Item Access	Region Access	Web Access	History	
Web Login					
Web Windows User Name:					
Web User Name:	superadmin				
Web Password:					
Details					
Software Permissions Group:	Super Admin	•			
	Please Select				
	Fault Admin				
	NoOutstandingFault Permission groups -				

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.

● ⑦ ① ○ English (UK) ● ■ Edit Item Type - Fleet Vehicles			Su	per Admin Log Off traka.com traka
- Edit Customise Type Reasons History	Export			ASSA ABLO
Short Description	• 📎	On Release	On Return	
Air Conditioning Gas Recharge		Y	~	
Air Conditioning Maintenance		~	V	
General Use		v	V	
Major Service		v	V	
Minor Service		~	V	
мот		v	V	
Refuel		~	V	
Tyre Change		~	V	
Winter Check		~	V	
Page 1 of 1 (9 items) 🔣 🔇 1 🔊 🔊			Page size:	20 🔽

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.

#		traka
	14/10/2014 15:26:26	ASSA ABLOY
A	Simon Dixey	
	T2FOB Ford Transit; KP10WWW Seat Leon	
	Please select the reason for requesting this item:	
	Reason	
	Refuel	
	Tyre Change	
11	General Use	
	Major Service	Menu
	Air Conditioning Gas Recharge	Hend
	Minor Service	Help
	Continue	Lookup

The reason selected by the user is shown in the activity grid and can also be viewed in the <u>Reason Reports</u>.

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.

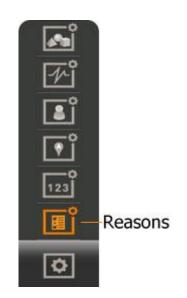
Reason Logging		
System Default	On Release	-
	Off	
This perform such sub-	On Release	em on either iFob release o
Fob return, or both.	On Release On Return On Release and Return	en orreine rooreese c

- **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.

6.3.2 CREATING REASONS

To create a Reason, select the Software Settings button from the <u>Navigation Toolbar</u> 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 Add button.
- 2. A new form will appear allowing you to enter both a short and long description. The short description 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 long description has a maximum character length of 500 and allows for a more detailed description, which is used for reports.

Reson	
Short Description: Long Description:	Lock Broken Need to take the key from the system to repair the lock.

- 3. Once you have finished, click the Save & Return button.
- 4. The list will now have the new Reason you just added.

"and and "high sould have all here and have a first	Attrine Export		
Short Description	Long Description		
Lock Broken	Need to take the key from the system to repar	the lock.	
Page 1 of 1 (1 items) 🔞 🗿 🚺	00	Page size:	20 🧱

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 <u>Adding an Item to an iFob</u> topic.

Once an item has been defined, you will need to assign a Reason to the <u>Item Type</u>.

1. From the Navigation 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.

Accounts	
Board Room	
Cleaning Keys	
Company Safe	
Customer Profiles	
Directors Suite	
First Aid Cupboard	
Fleet Vehicles	
HR Office	
International Office	
Key	
Marketing Stock	
Mezannine Cage	
MH€ Keys	
Training Room	
Uniform Stock	
Unit 4	
Vending Machine Stock	
Warehouse Storage	
Page 1 of 1 (19 Items) 🔞 🕼 🛐 🚳	Page size: 20

- 3. Select the Edit button.
- 4. The item details form will open allowing you to change its information. Select the Reasons tab.

hort Description	. 💿 On	Relazio	On Return
Account Enquiry			
Jeaning			
Data Protection			
ghvgbz		0	
ock Broken		×	
faintenance			
AOT Test			
Paperwork Archival			
Purge Old Accounts			
lefueled			
tefueling			
iervice			

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

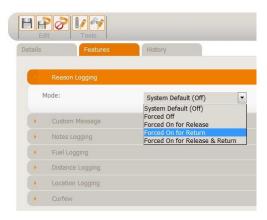
NOTE: If your system is an RFID Locker System, it will not contain iFobs. However, this section will still be relevant and the term 'iFob' will be referring to the 'RFID Tag' in a Locker System.

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 Ribbon Toolbar.
- 2. Select the Features tab.
- 3. From the Reason 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 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 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 they 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.

	22/08/2014 11:37:55	traka
2	Aaron Kennedy	ASSA ABLO
	Please select the reason for requesting	this item:
-	Reason	
1	Lock Broken	
		Men
		Help
	Continue Cancel	

3. The item will now release from the system.

6.3.6 ACTIVITIES

The <u>system viewer</u> 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.

Item Activity IFeb Ac	to vity iFo	b Access S	ystem Activity	Items	
Activity	\odot	When		Who	\odot
Return Reason Entered		29/08/2014 0	9:40:55	Aaron Kennedy	
Item Returned		29/08/2014 09:40:46		Aaron Kennedy	
Item Removed		29/08/2014 09:27:09		Aaron Kennedy	
Release Reason Entered		29/08/2014 09:27:07		Aaron Kennedy	
4					1
3 1 🔊		Page	size:		20 🔽

If a user returns an item and they do not select a reason and close the door, a 'Release Reason Not Entered' activity will be generated.

Activity	\odot	When 👻	Who 📀		
Return Reason Not Enter	əd	29/08/2014 09:39:59	Aaron Kennedy		
Item Returned		29/08/2014 09:39:53	Aaron Kennedy		
Item Removed		29/08/2014 09:33:36	Aaron Kennedy		
Release Reason Entered		29/08/2014 09:33:34	Aaron Kennedy		
4					
		Page size:	20 📘		

You can also see the Release/Return Reason in the detail panel on the <u>system viewer</u>. 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 REPORTS

You can run various reports to see which items have been removed/returned with what 'reason' logged against them. Please refer to the <u>Reason Reports</u> section.

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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 <u>Notes</u> <u>Report</u> 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:

otes Logging		
System Default	On Release and Return	
his option sets whe	0# On Release On Return On Release and Return	n on either iFob release or
ob return, or both	On Release and Return	

- **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.

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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 Ribbon 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 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.

		02/0	9/201	5 16:	54.50	, ,					AS	SA ABLO
						Pos 1:						
<u> </u>				Pleas	e ente	r any i	notes l	pelow:				
Job Ref	: Jon20	14/08, r	n/s/f Sho	ock Abso	orber Fa	ulty, Rei	moval a	nd Repla	acement			
l												
	1	2	3	4	5	6	7	8	9	0		
12?	1	2	3	4	5	6	7	8			-	
12?	1 Q	2 W	з е	4 r	5 t	б У	7 U	8 i	9 O	° p	+	ОК
	1 q	2 W	3 e	4 r 5	5 t	6 y	7 U *	8 i				ОК
12?	@	+	-		%	8		8 i (+	
	<u> </u>	2 ₩ * \$	3 e d			_		i i k				OK Skip

Click **OK**. The item will now be released from the system.

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6.4.4 ACTIVITIES

The <u>system viewer</u> 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 IFob Activity	iFo	b Access System Activity	Items		
Activity	9	When 🔹	Who 📀		
Return Notes Entered		29/08/2014 09:41:22	Aaron Kennedy		
Item Returned		29/08/2014 09:41:04	Aaron Kennedy		
Item Removed		29/08/2014 09:40:48	Aaron Kennedy		
Release Notes Entered		29/08/2014 09:40:46	Aaron Kennedy		
4					
3 1 🔕		Page size:	20 🗧		

If a user returns an item, they do not enter a note, and they select OK/Skip or close the door, a 'Release 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.

Activity	\odot	When		Who	\odot
Return Notes Not Entered	29/08/201	4 09:44:29	Aaron Kennedy		
Item Returned	29/08/2014	4 09:44:21	Aaron Kennedy		
Item Removed	29/08/2014	4 09:43:50	Aaron Kennedy		
e					

You can also see the Release/Return Note in the detail panel on the system viewer.



6.4.5 REPORTS

You can run various reports to see which notes were entered against an item and when it was released or returned. Please refer to the <u>Note Reports</u> section.

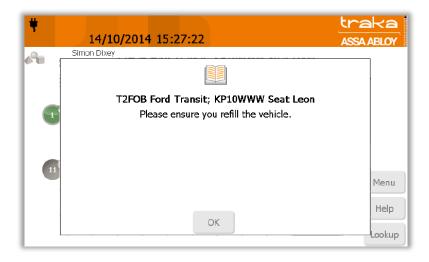
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6.5 CUSTOM MESSAGES

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:

System Default	On Release and Return	
	Off On Release	
his option sets whe	On Return On Return On Release and Return	system on either iFob release
Fob return, or bol	On Release and Return	

- 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 basis. Please see the appropriate section below for further instructions.

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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.
- 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.

Reason Logging	
Custom Message	
Mode:	System Default (Off)
Custom Release Message:	System Default (Off) Forced Off Forced On for Release Forced On for Return Forced On for Release & Return
Custom Return Message:	

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.

Custom Messages	
Mode:	Forced On for Release & Return 🔹
Custom Release Message:	Please note this vehicle can only be refueled with diesel.
Custom Return Message:	Ensure that you have not left the vehicle empty of fuel.

6. Once you have finished, click the Save or Save and Return button.

6.5.4 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.

ŧ	27/08/2014 10:09:36	traka ASSA ABLOY
Î r	Aaron Kennedy	
8		
		uk di sad
6	Please note this vehicle can only be refueled wi	th diesel.
-		
		Menu
		Help
	ок	Lookur

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.

•		traka
	27/08/2014 11:07:46	ASSA ABLOY
Î r	Aaron Kennedy	
57.5		
-	Ensure that you have not left the vehicle em	pty of fuel.
C		
		Menu
		Help
L	ок	Lookup

6.5.5 ACTIVITIES

The <u>system viewer</u> displays a grid that holds the last 30 days 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 Item Activity tab.

Item Activity / iFeb	Activity	b Access Sy	stem Activity	10enns	
Activity	\odot	When		Who	\odot
Return Message Confi	rmed	28/08/2014 1	3:50:05	Aaron Kennedy	
Item Returned		28/08/2014 1	3:50:01	Aaron Kennedy	
Item Removed		28/08/2014 1	5:49:42	Aaron Kennedy	
Release Message Conf	irmed	28/08/2014 1	5:49:41	Aaron Kennedy	
4					
3 1 🔊		Page	size		20 🔽

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.

Item Activity	Fob Activity	iFol	Access	System Activ	ity .	1 terris	
Activity	0	8	When			Who	\odot
Return Message No	t Confirmed		28/08/20	14 20:55:55		Aaron Kennedy	
Item Returned			28/08/20	14 20:55:24		Aaron Kennedy	
Item Removed			28/08/20	14 19:14:49		Aaron Kennedy	
Release Message C	onfirmed		28/08/20	14 19:14:47		Aaron Kennedy	
4							
3 1 🔊			1	Page size:			20 🔽

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 the **TrakaWEB Installation & Configuration Guide – TD0013.**

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 trigger, recipient(s), subject, and the content of the email.

1. From the navigation toolbar at the bottom of the screen, select the Software Settings button.



2. Next, click the Notifications button.



3. 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 'Add' icon.

dit	Customise Export	
Enabled	Name	
V	Item or User Email	
✓	Item Removed Receipt	
~	Item Returned Receipt	
4		1
Page 1 of 1 (3	items) 🔇 🔇 1 🔊 🔊	Page size: 20 🔽

6.6.3.1 NEW NOTIFICATION DETAILS

1. The 'New Notifications' window will appear allowing you to enter specific details.

New Notificatio	n	tra Assa A
Step 1 - No	tification Details	
1.2		
Enabled:	×.	
Enabled: Name:	2	
	✓ - Select Category	Cancel Next

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 5 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.

New Notifi	cation	trak Assa ABI
Step 1 - No	otification Details	
Enabled:		
Name:	New Notification	
	New Notification Select Category	Canad
Name:	New Notification Select Category Select Category	Cancel Next
Name:	New Notification Select Category	Cancel Next
Name:	New Notification - Select Category - Select Category Item	Cancel Next
Name:	New Notification Select Category Select Category Item Item Item or User	Cancel Next
Name:	New Notification - Select Category - - Select Category - Item Item or User System	Cancel Next

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.

Customis	e Export		
Step 2 - /	Activity Triggers		
All Triggers	Name		▲ Alarm
	Item Duress Cleared		
	Item Emergency Released		~
	Item Emergency Returned		
	Item Handover		
	Item Handover Not Specified		
	Item In but Not On Charge		V
	Item In with Charge Fault		
	Item Off Charge		
	Item On Charge		
	Item Overdue		
	Item Redetectable		\checkmark
v	Item Removed		
	Item Removed From Wrong Slot		\checkmark
	Item Removed Illegally		\checkmark
	Item Removed Manually		
	Item Replaced		
	Item Returned		
	Item Returned To Wrong Slot		
	Item Undetectable		
	Memory Critical		
Page 3 of <mark>6</mark> (116	items) 🔇 🤇 1 2 🧕 4 5 6 👂 📎	Page size:	20 🔽
P Create Filter			

In the example above, 'Item Removed' has been selected. This means that when any item is removed 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.

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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.

Customis	Export		
Step 3 - F	Region Access		
All Regions			
Selected	Name		
V	Default		
\checkmark	UK		
Page 1 of 1 (2 iter	ns) 🔇 🔇 🔟 🔊 🔊	Page size:	20
P Create Filter			
		Cancel Back	Next

6.6.3.4 SYSTEM FILTER

The 'System Filter' allows for the selection of specific cabinet or locker systems. Notifications will be triggered only on the selected system(s).

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.

Share A Cou	ton Tilton		
Step 4 - Sys	stem Fliter		
All Systems			
Selected 📀	Name		
	Server Room		
	Reception		
Page 1 of 1 (2 items)	00100	Page size:	20
Treate Filter			

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 are 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. If no items are selected, then a notification will be triggered for an activity that occurs that references any item. Clicking on the Check Box next to 'All Items' will automatically select all the Items listed. Click 'Next' to continue.

step 5 -	Item Filter					
All Items						
Selected	System • 😔	Position -	Detail 1	Detail 2	Detail 3	Detail 4
8	Reception	1	Server Room			
	Reception	2	Store Room			
$[\Theta]$	Reception	3	Training Materials		0.	
\mathbb{R}	Reception	4	IT Department			
	Reception	5	Garage Key			
	Reception	6	Canteen			
$\left[\varphi \right]$	Reception	7	Ford Focus			
1	Reception	8	Mercedes			
	Reception	9	BMW			
	Reception	10	Tool Cabinet			
	tems) 🔞 🕄 🗿	63			Page size:	20

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.

All Users								
	Display Name	• Staff Number 📀	Position	0	Tel	0	Fax	
	Ed Mann	1234	General Mgr.					
	John Smith	2498	Training					
	Joe Edwards	1563	HR Manager					
	Mike Jones	0294	Production					
	Paul Davis	4463	Sales					
	Sarah Brown	2148	Marketing					

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.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.Positon}
- {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}

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}.

Details	Activity Trigger	Region Access	System Filter	Item Filter	Email Template	
To:						
CC:						
BCC:						
Subject:						
Body:						
-	12 E E =	1	Arial		(Font Size) B	<u>IUSA</u> -
(User Token)	(Event Token)	System Token)	(iFob Token)	(Item Token)	(Item Booking Token)	Fault Logging Tol
{Item.Detail01} {Item.Detail02} {Item.Detail03} Regards						
					Cancel	Back Finish

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 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.

Notifica	tions	traka ASSA ABLON
+	Customise	
Enabled	Name	-
~		
~	Reception	
4		ь. Э
Page 1 of 1 (2	items) 🔇 🔇 🧕 🕥 🔊	Page size: 20
P Create Filter		

Selecting an individual tab will take you to its specific page for editing. When you have finished making your changes, click 'Save and Return'.

Edit Notifica	tion						tral ASSA AE
							ASSA AD
HP?							
Details	Activity Trigger	Region Access	System Filter	Item Filter	User Filter	Email Template	
Enabled:							
Notification Name:	Ite	ems Removed					
Notification Catego	ory:	em or User					

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 <u>Using Email Notifications</u> section.

6.6.5 DELETING AN EMAIL NOTIFICATION

To delete an existing email notification, select the notification and then click on delete.

+ &	Customise Export	
Enabled	Name	
~	Item or User Email	
 Image: A start of the start of	Item Removed Receipt	
v	Item Returned Receipt	
(
Page 1 of 1 (3	items) (\checkmark 1 $>$ $>$	Page size: 20 🔽
P Create Filter		

6.6.6 USING EMAIL NOTIFICATIONS

Once you have <u>set up your Email Notification</u> 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.

Details Activity Trigger Region Access System Filter Item Filter To: Andrew.Swain@traka.com Subject: Fault Cleared Body:	Reply Reply All R Forward C IM Wed 17/05/2017 17:08 Swain, Andrew Fault Cleared
Image: Second	Fault 20, logged by Andy on 17/05/2017 16:42 Exhaust blowing: The exhaust sounds like it make have corroded through. Critical? No
Repaired? (FaultLogging Repaired). by (FaultLogging RepairedBy) on (FaultLogging RepairedDate) Cleared? (FaultLogging Cleared). by (FaultLogging ClearedBy) on (FaultLogging ClearedDate) <u>Notes</u> (FaultLogging ClearedNotes)	Repaired? Yes, by Super Admin on 17/05/2017 16:44 Cleared? Yes, by Super Admin on 17/05/2017 16:44 Notes

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 remove the appropriate item from the system.
- 3. This will now trigger the notification to 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 its 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 <u>Email Notifications</u>. 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 only be created and edited through TrakaWEB and are not editable at Traka Touch.

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 straight forward. 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 taken into account.

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 THE ITEM BOOKING LANDING PAGE

The option to navigate to the Item Booking Landing page in TrakaWEB is located in the Navigation Toolbar.

1. Click on the 'Items' icon.



2. From the tab, click on the 'Item Booking' icon.



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You will now be taken to the Item Booking Landing Page as shown below.

Edit	Customise		yort Zoom	Refresh 27/04/201	16 13:10 Start Date	04/05/201	6 14:10 End Date
	27 A¢	pril 2016 - 01 May 20)16		0	2 May 2016 - 04 May 2	016
27 Wed	28 Thu	29 Fri	30 Sat		2 Mon		4 Wed
	20 110						
	king ID + Start	← End		Display System Name	Pos.	Description	
		← End	No	Display Name System data to display		Description	

Many of the icons on the Ribbon 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.

+ [. *			3
Edit	Customise	Export 200m Ref	resh

6.7.3 THE BOOKING WIZARD

1. From the main Landing page, click on the 'Create' icon.

-	2	×		H	T		-	×	Q	9	
	Edit			Custo	mise		Exp	oort	Zo	om	Refresh

Only a user with Administrator access will be able to set up a Booking. This is a 5-step process, divided up over a number of pages. The first page displays the first 2 steps.

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.

Customise					
	the user would like to a	collect the ite	ms from		
Step 2/5 - Select who t Available Users:	ne booking is for				
Display Name	Staff Number	Job Role	Tel	Fax	Mobile
Rob					
Super Admin					
Sarah Brown	1031	HR Manager			
Dave Jones	6042	Sales Manager			
John Smith	2946	Production Supervisor			
4		1			•
Page 1 of 1 (5 items) 🕜 🔇 1 🔇	0				Page size: 20 🔽
🕈 <u>Create Filter</u>					
Add to selected Remove from sele	ted				
selected Users:					
Display Name	 Staff Number 	Job Role	Tel	Fax	Mobile
	No	data to display			
					•
4					

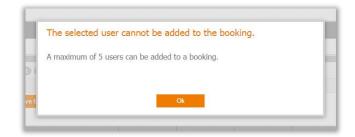
Step 2/5 – Select who the booking is for

2. 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.

Create Booking					trak ASSA AB
Customise					
Step 1/5 - Select where	e the user would like to	collect the ite	ems from		
Region: Default					
System Reception					
Step 2/5 - Select who t Available Users:	he booking is for				
Display Name	Staff Number	Job Role	Tel	Fax	Mobile
Rob					
Super Admin Sarah Brown	1031	HR Manager			
John Smith	2946	Production Supervisor			
4					•
Page 1 of 1 (4 items) 🕜 🔇 1 🌘	0				Page size: 20 🔽
♥ <u>Create Filter</u>					
Add to selected Remove from selected	cted				
Selected Users:					
Display Name	 Staff Number 	Job Role	Tel	Fax	Mobile
Dave Jones	6042	Sales Manager			
4					•
				Ca	incel Next

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.



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: If at any time, you wish to make a change, click on the 'Back' button to return to the previous page.

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.

	ntomise	ali 16	emsj				Iter						
Chap 2/E	Color	t when you v	unuld li	ike te h	ank I	ha itan							
Step 3/5	- Selec	t when you v	vouia ii	ike to D	OOK 1								
Start: 27/04/2	016 14:13	2			- 1	The da	te and ti	me you are one of the s	selectir	ig is in			
End: 28/04/2		-				(GMT)	Dublin,	Edinburgh, L	isbon, I	London			
28/04/2	016 14:13												
Stan 4/5	- Solor	t what items	VOLUM	ould like	a to l	hook							
		t what items	you w	ould like	etui	DOOK							
Available Item	is:												
System - 😔	Pos. •	Description	• 🔍	Detail 1	\odot	Detail 2	0	Detail 3	0	Detail 4	0	Detail 5	0
Reception	1	Red Ford Focus				States and States							
Reception	2	Silver Ford Focus											
Reception	3	HR Department											
Reception	4	Store Room											
Reception	5	Filing Cabinet											
Reception	6	Reception Key											
Reception	7	Maintenance Store											
Reception	8	Meeting Room											
Reception	9	Training Materials											
Reception	10	Garage key											
4													
Page 1 of 1 (10	0 items)	00100										Page size:	20
Treate Filter													
Contraction of the second s	-												
Add to selecte	d Remo	ve from selected											
Selected Item	5:												
-			_	_	_	_	_	_	_	_	_		_

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.

🚰 Cre	ate Boo	oking						traka ASSA ABLOY
	H T	X 🛋 🕑 (All Ite	ems)		Item A	ccess		D
Step 3/5	- Selec	t when you w	ould like to l	book the it	ems			
Start: 02/11/2	2020 14:31			te and time you a 10:00) Dublin, Ed			e zone of the system, which is:	
End: 02/11/2	2020 15:31		(or on	10100) Babini, La	indurghy clobon	, 20110011		
Step 4/5 Available Iten		t the items yo	ou would like	to book				
Available Iten	15.							
System 🔸	Pos. •		 Detail 1 	Detail 2	Detail 3	Detail 4	Detail 5	
Cabinet	1							
Cabinet	2							

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.

	eate Booking						tral ASSA AE
	E T X Auth	orised Items		Item A	ccess		ACCAINE
Sten 3/5	- Select when you	would like to be	ock the it	oms			
Start: 02/11/ End: 02/11/	/2020 14:31 • /2020 15:31 •	① The date (UTC+00:	and time you a 00) Dublin, Edi			e zone of the system, which	h is:
Step 4/5	- Select the items y	ou would like t	o book				
Available Iter	ms:						
Available Iter System	ns: Pos. Description	- Detail 1	Detail 2	Detail 3	Detail 4	Detail 5	
		• Detail 1	Detail 2	Detail 3	Detail 4	Detail 5	
System	 Pos. Description 	← Detail 1	Detail 2	Detail 3	Detail 4	Detail 5	
System Cabinet Cabinet	 Pos. Description 1 	← Detail 1	Detail 2	Detail 3	Detail 4	Detail 5	Page size: 100 💌

Once you have made a selection, you can progress with setting a start and end duration for the booking.

Cabinet

Cabinet

3

4

3. Click on the **Start** drop-down and select when the booking will start. Then click **OK**.

tart:					MIE	en y	ou	would	u like t	0.0	OOK	the ite	date and ti	me you are one of the s	selectin	g is in			
nd:	«	3		Apri	il 201	6		00				(GMT	") Dublin, l	one of the s Edinburgh, I	Lisbon, L	ondon			
		Mon	Tue	Wed	Thu	Fri	Sat	Sun											
itep	13	28	29				2	3			• .	ook							
vailal	14	4	5	6		8	9	10		0									
_	15				14		16	17				and the second	100		0	Charles and the	100	Constant of the local	
Syster	16	18	19	20	21	22	23	24				Detail 2							\odot
Recep		25	26	27	28	29	30	1	15:30		 \$								
Recep Recep	18	Z	3	4	5	6	7	8											
Recep	T	oday							OK		Cancel								
Recep				1					1										
Recepti			6		ecepti														
Recepti			7		ainten eeting														
Recepti Recepti			5		eeting aining														
Recepti			10		arage														
(>
Page 1	of 1	(10 it	ems)	0	0	1 0	\otimes											Page	size: 20 🔽
Creat	e Filte	Ľ																	
Add to	solo	tod	Rem	ovo f	iom -	oloci	nd.												
			Null	046.1	rom s	CIECI	.eu												
	d Ite	ms:																	
electe																			

4. Click on the drop-down menu for **End** and select when the booking will end then click **OK**.

Step					wh	ien y	/ou	would	d like t	to b	ook			ind ti	me you are	solartin	ua is in			
	_		016 15			-						the	local ti	me z	one of the s Edinburgh, I	ystem,	which is			
110.		04/2			ril 20	016	-	00		-		٦.								
Step	1-					nu Fri						ook								
Availal				30	3		Sat 2	3		•		DOIL								
	14			6		8	9	10		~	•	and the second second	201	-		~	and the second second	0	Contraction of the	
Syste	15					4 15	16	17	÷.	X.		Detail								\odot
Recep							23	24		ŗ,	•									
Recep				27	2	8 29	30	1			-	-								
Recep			3	4	5	6	7	8	17:30)									
Recep	2								CAPINO 1		- and the second second									
Recep		Toda	y .					1	GK		Cancel									
Recep						ng Roo						-								
Recep						ing Mat														
Recep	otion			10 0	Garag	je key														
4						-														•
			items)		00	10													Page si	.e: 20 🔛
Trea	ate Fi	lter																		
Add to	o sel	ecter	I Re	move	from	1 selec	ted													
Select	od B	tom																		
select	ed I	tem	s:																	
			005 -	Deta	61		Detai	2	Detail 3		Deta	14		15						

Step 4/5 – Select the items you would like to book

5. 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.

Description A O Initial 1 O Initial 2 O Initial 3 O Initial 4 The selected item cannot be added to the booking.	
A maximum of 5 iFobs each with at least 1 item can be added to a booking.	
Ok	

6. Once you have finished selecting items. Click 'OK' to continue.

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.

Step 5	5/5 - Con	ıfirm t	he bookir	ng					
Where:	Region: D	efault		-					
	System: R	Receptio	n						
Who:	Display Nam				Staff N				Mobile
	Dave Jones				6042		Sales Manager		
When:	27/04/201	6 15:3	0 To 28/04,	2016 17:30					
What:	System	Pos.	Description	Detail 1	Detail 2	Detail 3	Detail 4	Detail 5	
	Reception	2	Silver Ford Focus						
	4		rocus						Þ.
Notes:									

- 7. If you are satisfied that the details are correct, click 'Confirm' to continue.
- 8. A message will appear to inform you that the booking has successfully been created. Click 'OK' to close the message.

Cre	ate Booking	
The	booking has been successfully created.	
	Ok	

The Item Booking Landing page will display a Gantt chart showing a timeline for the booked items. The timeline in the example below is divided into 2 horizontal columns: days and months.

	Edit	× •	Customise	Export Zoom		27/04/2016 13 Start		© 04/05/2016 14 End	
				27 April 2016 - 01 May 20	16			02 May 2016 - 04 May 2	016
									4 Wed
Posi Desc	em: Rece tion: 2 ription: 5 I Focus	2010 CO.	14:25 Super Admin 27/04/2016 15:30 28/04/2016 17:30 Dave Jones						
Forc						and the second second	and the	Description	0
Hore	Sync	Booking ID 🔹	Start		Display Name				
Ford	Sync o	Booking ID -	Start 27/04/2016 14:25	 End 28/04/2016 14:25 	Display Name Super Admin	System 📀	Pos. 6	Reception Key	×
For					Name				S

6.7.4 ADDING EXTRA USERS TO AN EXISTING BOOKING

If required, additional users maybe included to an existing booking. This will however still apply to a maximum of 5 users per booking.

1. Select the Item Booking from the Navigation Toolbar.



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.

		•	H T 🗶			⊙ 27/04/2016 13		04/05/2016	ASSA A
-	Edit		Customise	Export Zoom		Start			d Date
				27 April 2016 - 01 May 20)16			02 May 2016 - 04 May	2016
									4 Wed
Posit Desc	m: Rece ion: 6 iption: ption Ke		27/04/2016 14:25 2 14:25 4 14:25 14:25 Super Admin						
Posit Desci	m: Rece ion: 2 iption: 5 Focus		 18 ■ 27/04/2016 15:30 ■ 28/04/2016 17:30 Dave Jones 	0					
	Sync	Booking ID 🔹	Start	← End	Display Name	System 😔	Pos.	Description	e
	•	17	27/04/2016 14:25	28/04/2016 14:25	Super Admin	Reception	6	Reception Key	
	0	18	27/04/2016 15:30	28/04/2016 17:30	Dave Jones	Reception	2	Silver Ford Focus	
4	1 of 1	(2 items) 🕜 (0100						Page size: 20
	TUTT	(z items)	0 1 0 0						Page size. 20

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3. From the available list of users, select the new user to be added to the selected booking.

Create Booking					trak ASSA ABL
Customise					
Step 1/5 - Select where Region: Default System Reception	e the user would like to o • •	collect the ite	ems from		
Step 2/5 - Select who t Available Users:	he booking is for				
Display Name	Staff Number				Mobile
Rob					
Super Admin Sarah Brown	1031	HR Manager			
John Smith	2946	Production			
4		Supervisor			
Page 1 of 1 (4 items) 🕜 🔇 📘	00				Page size: 20 🔽
♥ Create Filter					
Add to selected Remove from sele	ected				
Selected Users:					
Display Name	- Staff Number	Job Role	Tel	Fax	Mobile
Dave Jones	6042	Sales Manager			
A					•
					Incel Next

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.

6.7.5 ADDING EXTRA ITEM BOOKINGS

If required, you may add extra bookings to the one already created.

1. Click on the 'Item Booking' icon in the Navigation Toolbar.



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.

	4	*						04/05/2016	ASSA AE	
	Edit	1	Customise	Export Zoom	Refresh	Start	Date	1 0	nd Date	
				7 April 2016 - 01 May 20	April 2016 - 01 May 2016					
			Wed 28 Thu				21	fon 3 Tue	4 Wed	
Syste Positi	m: Rece on: 2 iption: 5 Focus	ption	28/04/2016 14:25 Super Admin 27/04/2016 15:30 28/04/2016 17:30 Dave Jones							
		Booking ID •	Start •	End	Display Name	System 📀	Pos.	Description	\odot	
	Sync				C		- 21	Reception Key		
	Sync	17	27/04/2016 14:25	28/04/2016 14:25	Super Admin	Reception	6	Reception Rey		
			27/04/2016 14:25 27/04/2016 15:30	28/04/2016 14:25 28/04/2016 17:30	Admin Dave Jones	Reception Reception	2	Silver Ford Focus		

6.7.6 USING 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.

T	Edit	* • •	H T *			28/04/2016 15 Start	:40 Date	02/05	2016 15:40 End Date
	EGIL	,	Customise	28 April 2016	Interneshi		Unit	1	May 2016 - 02 May 2016
			28 Thu	28 April 2016 29 Fri		0 Sat			2 Mon
Post	em: Rece ion: 1 ription: I S	ption Red Ford	6:33 6:33 Dave Jo Steve Ac	dams					
					Display	System 😔	Pos.	Description	\odot
	Sync	Booking ID 🔹							
	Sync	Booking ID 👻			Name Dave				
			28/04/2016 16:33						

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.

+ 🦾 Edit	Booking	Customise	Export	efresh) 28/04/2016 1 Start	5:40 Date	○ 14/05/2016 1 En	ASSA ABL
	28 A	oril 2016 - 01 May 2016	02 May	2016 - 08 Ma	y 2016		09 May 2016 - 14 Ma	y 2016
	28 Thu		2 Mon 3 Tue 4 We				Mon 10 Tue 11 Wed 12 Th	u 13 Fri 14 Sat
System: Rece Position: 2 Description: Ford Focus		9 31 🕃 28/04/2016 16 Rob	:40 🕄 13/05/2016 16:4	0				
Position: 1 Description: Focus	2 2 10 10	3 38 8/04/2 9/04/2 9/04/2 03:33 Dave nes Steve Jams Sarah own						*
	Booking ID 🝷	Start -	End	Display Name	System 🕑	Pos.	Description	\odot
Sync	BOOMING ID -							
Sync	30			Dave Jones				
	30	28/04/2016 16:33 28/04/2016 16:40	29/04/2016 16:33 13/05/2016 16:40	Dave Jones Rob	Reception Reception		Red Ford Focus 2 Silver Ford Focus	
• •	30 31	28/04/2016 16:40		Jones	A CONTRACTOR OF A) Dago cizar 20
• • •	30 31 (2 items)	28/04/2016 16:40		Jones	A CONTRACTOR OF A			► Page size: 20 🔽

6.7.7 COLLECTING 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, swipe card or fingerprint.

ⓑ ♥ 1 20/07/2018 11:57:32			aka A ABLOY
To access the system, enter your ID or press Search to find an item			
	1	2	3
****	4	5	6
	7	8	9
Search Help New PIN	$\overline{\times}$	0	L.

3. Click on 'I Know What I Want'.

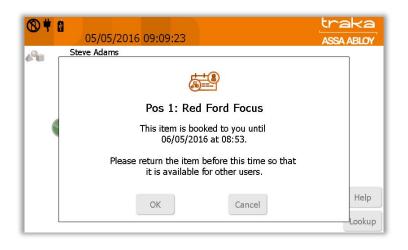


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This Document is uncontrolled when printed unless over stamped "CONTROLLED DOCUMENT"

The door will open and if the item is available to you, it will now be accessible. A message will appear on the screen providing you with the Booking information.



6.7.8 ITEMS NOT TAKEN

A sub-configuration option is available which can be 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. 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.

Exception Jate							
)7/11/2017)9:13:08	1003	Item not taken at the start of the booking	New System	8			
)7/11/2017)9:13:08	1003	Item not taken at the start of the booking	New System	9			
)7/11/2017)9:13:08	1003	Item not taken at the start of the booking	New System	10			
07/11/2017 09:01:08	1002	Item not taken at the start of the booking	New System	8			
)7/11/2017)9:01:08	1002	Item not taken at the start of the booking	New System	9			
)7/11/2017)9:01:08	1002	Item not taken at the start of the booking	New System	10			
06/11/2017 17:13:05	4	Item not taken at the start of the booking	New System	8			
06/11/2017 17:13:05	4	Item not taken at the start of the booking	New System	9			
06/11/2017 17:13:05	4	Item not taken at the start of the booking	New System	10			
26/10/2017 17:00:54	0	Booked Item Overdue	New System	10		Rob	

6.7.9 END BOOKING UPON ITEM RETURN

A simple sub-configuration option is available 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 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.

6.7.10 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.**

Service setup	Details Email Configuration PIN Notification	Enrollment ID Notification	Booking Options
	Engine Name Business Engine on UKOLND-A11557		
Perfault Perfault	Business Engine on UKOLND-A11557 Host name UKOLND-A11557 IP Address 10. 239. 229. 39 Engine State Online Start Stop	Logging Level None Low Hgh	Save
۲. m ک			

3. 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.

bject	Email Template Fields
aka Item Booking Confirmation - #{0} {5}	{0} = Booking ID
dy	{1} = Start Date
par {6} {7}	{2} = End Date
te following Item Booking has been successfully {5}.	{3} = Booking Region
boking ID: {0}	{4} = Booking System
boked from: {1}	{5} = Booking Action
boked until: {2}	(Created/Edited/Deleted)
lection point: {4}	{6} = First Name
ms Booked:	{7} = Last Name
0}	{8} = Booking Votes
ho the Items are booked to:	{9} = Booking User List (HTML Table)
}	{10} = Booking Item List (HTML Table)

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.

24	Hours 🔻
	Hours
	Days

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.

The selected date range is not valid.	
Items cannot be booked more than 2 Hours in advan- start date and try again.	ce. Please correct the
Ok	

6.7.11 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. Select the user you wish to allocate the Booking Override permission to and then click the 'Edit' button.

	Customise	Export Opfault	Region	0) (All System Sys	ms) stem	$ \odot$	(All Users) Act) tive	
Sync	Display Name	Staff Number 📀	Job Role	\odot	Tel	\odot	Fax	\odot	Mobile	\odot
•	Rob			1						
۲	Steve Adams	13692								
۲	Super Admin									
	Sarah Brown	1031	HR Manager							
۲	Dave Jones	6042	Sales Manager							_
•	John Smith	2946	Production Supervisor							
<							29			۰.

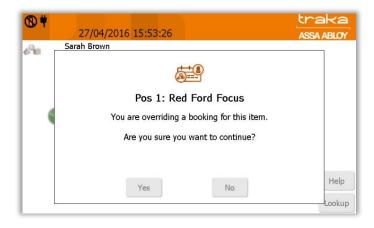
2. At the next page, click on the 'System Access' tab.

Edit User -	Sarah Brown					
HPZ	_		_			
Edit Details	System Access	Item Access	Region Acces			
User						
Forename:	s	arah				
Surname:	E	Brown				
Display Name O	verride:					
Display Name:	S	arah Brown				

3. At the bottom of the 'System Access' page, scroll to the right and click on the check box under 'Item Booking Override' as shown below.

	8 o II Fi Ti			ASSA AB
Edit Tools	Customise	Export		
Details System /	Access Item Access	Region Access Web Access	History	
System Access				
Card ID:		Active:		
Keypad ID:	2222	Start Date:	27/04/2016	
Enrollment ID:		Expiry Date:	27/04/2046	<u>10</u>
PIN:		Authoriser:		
PIN Expiry Date:	27/04/2046	Permit Expiry Date:	28/04/2046	
PIN Force Change:	0			
Email PIN/Enrollment ID:				
Fingers Enrolled:	0			
Allowance 📀 No.	of Items Item Handover	Curfew		Item Booking Override
Unlimited	10 None	None 🔻		
Unlimited	0	None •		
4			Page size:	20 🔜
	0100		Page size.	

With the 'Item Booking Override' permission given to the user, they now have the ability to override an already booked item.



6.7.12 ITEMS BOOKED TO OTHER USERS

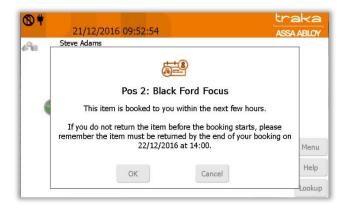
When a user has made a booking, the Traka Touch screen will display which items are already held by other users.



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.



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 before the booking begins.



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.

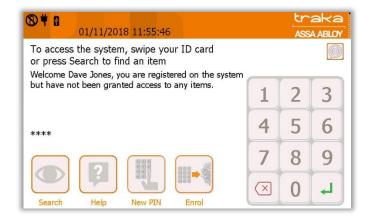
NOTE: If a user takes an item before or during a booking and fails to return it before the booking ends, the system will record an 'Item not returned at the end of the booking' event.

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.

6.7.13 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.

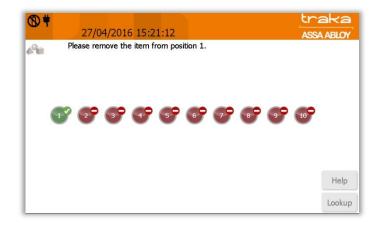
When the user enters their ID at the Traka Touch Screen and they have no active bookings, they will see the following screen.



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.



6.7.14 ITEM BOOKING CONFIRMATION

The ability to enable the Item Booking feature to send confirmation Emails is set up within TrakaWEB Admin.

- 1. Within TrakaWEB Admin, click on the 'Item Booking Options' tab.
- 2. Select the 'Enable Item Booking Confirmation Emails' checkbox.

lody	{0} = Booking ID
Dear {6} {7} The following Item Booking has been successfully {5}. Booking ID: {0} Booked from: {1} Booked until: {2} Collection point: {4} tems Booked: {10} Who the Items are booked to: {9}	 {1} = Start Date {2} = End Date {3} = Booking Region {4} = Booking System {5} = Booking Action (Created/Edited/Deleted) {6} = First Name {7} = Last Name {8} = Booking Notes {9} = Booking User List (HTML Table) {10} = Booking Item List (HTML Table)

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.

6.7.15 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.

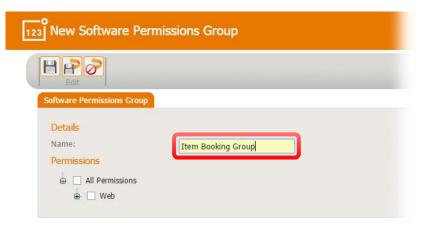
1. From the Navigation Toolbar, click on the 'Software Permissions Group' button.



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

Edit Everyone Group	Edit Everyone Group
🖶 🔳 Item Booking	😑 🔳 Item Booking
Book For Others	Book For Others
Allow only authorised items to be booked	Allow only authorised items to be booked
Allow all items to be booked	Allow all items to be booked
Book For Yourself	Book For Yourself
 Allow only authorised items to be booked 	Allow only authorised items to be booked
Allow all items to be booked	Allow all items to be booked
Realtime Activity	Realtime Activity

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.

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.

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 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.

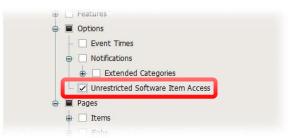
The check box for **Allow all items to be booked** will allow users to take booked items even if they have not been granted access to them.

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 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.



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5. Once you have finished making your selection, click **Save and Return**. The newly created Permissions group will be shown.

Software Permissions Groups		trak ASSA ABI
Edit Customise	Region	
Group Name		
Item Booking Group		
Super Monan		
Page 1 of 1 (2 items) 💿 🗿 🧵 🔊 🔊		Page size: 20 💽
P Create Filter		

You will now be able to allocate the Permissions Group to specific users.

6. Navigate to the **Edit User** page and then click on the **Web Access** tab.

Edit User - Steve Ad	lams			
H P 2				
Details System Ad	ccess Item Access	Region Access	Web Access	History
User				
Forename:	Steve			
Surname:	Adams			
Display Name Override:	0			
Display Name:	Steve Adams			

7. At the next page, create the Web Login details for the user and select the Software Permissions Group from the drop-down menu.

Edit User - Steve Ada	ams				traka ASSA ABLOY
HPZ					
Details System Acce	ess Item Access	Region Access	Web Access	History	
Web Login					
Web Windows User Name:					
Web Windows User Name: Web User Name:	SteveAdams				
	SteveAdams				
Web User Name:					
Web User Name: Web Password:					
Web User Name: Web Password: Details		•			

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.

6.7.16 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.

6.7.16.1 ITEM BOOKING ACTIVITY REPORT

1. Click on 'Reports' on the Navigation Toolbar, then locate the 'Item Booking Activity Report' under the 'Utilisation' drop-down menu.

Reports	tral Assa A
General	
Status	
Exceptions	
Permissions	
Regions	
Faults	
▶ Reasons	
Utilisation	
Activity Chart	
Item Booking Activity Report	
Diagnostics	

2. Click on 'View This Report'

 Activity Ch 	art		
View This Rep	ort		

You will now be taken to the 'Item Booking Activity Report'.

0		n 🐂 🔫 📬		//04/2016 11:17			04/05/2		
	Customi	se Expo	ort Refresh	Sta	art Date			End Date	
				Display Name					\odot
		28/04/2016 16:33	29/04/2016 16:33	3 Dave Jones	Reception				
	Dave Jones Sarah Brown Steve Adams			6042 1031 13692	Sales Manage HR Manager	a			
	4			1.00000					•
	15	27/04/2016 13:38	27/04/2016 13:4	9 John Smith	Reception	1	Red Ford For	cus	
	14	27/04/2016 12:26	27/04/2016 12:30	Dave Jones	Reception	1	Red Ford For	cus	
	8	27/04/2016 10:22	27/04/2016 10:30	0 Rob	Reception	1	Red Ford For	cus	

6.7.16.2 ITEM BOOKING EXCEPTION REPORT

1. Click on 'Reports' on the Navigation Toolbar, then locate the 'Item Booking Exception Report' under the 'Exceptions' drop-down menu.



2. Click on 'View this Report'.

1 6	Reports	
	ASSA A	ABL
*	General	
	Status	
	Exceptions	
1	Alarms Report	
(Illegal Handover Report	
	Not Seen In A While Report	
	Overdue Report	
	Who Hasn't Entered Reasons Report	
	Who Hasn't Entered Notes Report	
	Who Hasn't Acknowledged Messages Report	
	Item Booking Exception Report	
	View This Report	
	A report showing the exceptions encountered with item booking such as items not returned prior to booking and items not returned at the end of the booking.	
	Permissions	
	Regions	
	Faults	
	Reasons	
	Utilisation	
	Diagnostics	

You will now be taken to the 'Item Booking Exception Report'.

	T 🙁 🗎	Export Refre		1/2016 1	15:09 Start Date			© 06/05/2016 15:09 End Date
Exception _	Booking ID	Exception 📀	System 😔	Pos.	Description	\odot	Who	\odot
27/04/2016 13:49:09	15	Booked Item Overdue	Reception	1	Red Ford Focus		John Sm	ith
27/04/2016 12:30:01	14	Booked Item Overdue	Reception	1	Red Ford Focus		Dave Jon	165
26/04/2016 16:46:57	1	Booking Overridden	Reception	1	Red Ford Focus		Dave Jon	165
A Page 1 of 1 (3 ite								Page size: 20

6.7.17 DELETING ITEM BOOKING

1. Select Item Booking from the Navigation Toolbar.



2. At the Item Booking landing page, select the booking you wish to delete, and then click the 'Delete' button.

					0		10	ASSA ABI
+ 4 2		TI 🐩 🔊	Export Zoo		O4/05/2016 11: Start I		Sector 11/05/2016 El	12:14 nd Date
		0	14 May 2016 - 08 May 2	2016		09) May 2016 - 11 Ma	y 2016
System: Recepti Position: 2 Description: Silv Ford Focus	👗 Rob	5 Thu 04/2016 16:40	6 Fri ■ 13/05/2016 16:40	7 Sat	8 Sun	9 Mon	10 Tue	11 Wed
Position: 2 Description: Silv Ford Focus	on 31 1 28/	Contraction of the local sectors of the local secto	13/05/2016 16:40				10 Tue	
Position: 2 Description: Silv Ford Focus Sync I	er Kooking ID - Start	04/2016 16:40	13/05/2016 16:40	Display Name	System 📀	Pos. Desc	ription	11 Wed
Position: 2 Description: Silv Ford Focus	er Kooking ID - Start	04/2016 16:40	13/05/2016 16:40			Pos. Desc		

3. You will be directed to the 'Delete Booking' page. Click on the Delete button at the bottom of the page.

Fax Mobile
Þ

6.8 FUEL, DISTANCE & LOCATION LOGGING

Fuel, Distance & Location Logging are individual cost options which can be used to assist fleet managers with day-today 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.

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'.

Podubase setup Obdraut System maggenett System Default Off Yestem naggenett System Default Off Yestem Default On Retum Vestance Logging		System Configuration	System Design	Feature Options	Software Update	
Bydem Default Off Image: System Default Image: System Default Image: Stores - Online System Default Image: Stores - Online System Default Image: Stores - Online Stores - Online Image: Stores - Online Image: Stores - Online Image: Stores - Online		Fault Logging				
Person Person ■ Engree maragement Stores - Online ■ Engree maragement Custom Messages System Default Off ■ Engree maragement Stores - Online Stores - Online Stores - Online Distance Logging System Default Off ✓ Fuel Logging System Default Off ✓ Fuel Logging System Default On Return ✓	Users setup	System Default	Off			~
Reception - Online System Default Off Be or RAD-BUILDTEST - Online - RAD-BUILDTEST (10 239 223 241 Notes Logging Stores - Online Stores - Online System Default Off Stores - Online Stores - Online System Default Off Stores - Online Stores - Online System Default Off Stores - Online Stores - Online System Default Off Default Off Stores - Online Stores - Online System Default Off Distance Logging System Default On Return						
Group Beers AD-BUILDTEST (10.239.229.241 Stores - Online Stores - Online	Reception - Online	Reason Logging				
Bit on RAD-BUILDTEST - Online - RAD-BUILDTEST (10 239 229 241 Notes Logging Stores - Online Outcom Messages System Default Off System Default On Return Distance Logging		System Default	Off			~
System Default Off Stores - Online System Default Outcom Messages System Default Off ✓ Fuel Logging System Default On Return ✓ Diatance Logging ✓						
System Default Off	E- CE on RAD-BUILDTEST - Online - RAD-BUILDTEST (10.239.229.	Notes Logging				
Custom Messages System Default Off Fuel Logging System Default On Return Distance Logging		System Default	Off			~
System Default Off Fuel Logging System Default On Return Distance Logging	Stores - Online					
Fuel Logging System Default On Return V Distance Logging						- 13
System Default On Return V		System Default	Off			~
System Default On Return 🗸						
Distance Logging	(-			_
		System Default	On Return			~
		and the second s				_
System Default On Return		System Default	On Return			~
		and the second s				
Location Logging			La casa da casa			-
System Default On Return V		System Default	Un Hetum	10		<u> </u>
Save		Sa	ive			

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 'Edit Item'.

1/	-			99
		Edit	Customise	Export

3. At the next window, select the 'Features' tab.

Edit Item	- A1 Main	Car Park	
Edit	Tools		
Details	Features	History	<u> </u>
System			
Region:		Default	•
System:		Reception	•
Free iFobs Only:			
Position:		0001 (Silver Ford Focu	s) 💌

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' panels will enable you to change the 3 features to 'Forced On for Return'. Once the required features have been selected, click 'Save and Return'.

Edit Item - A1 Main	Car Park	trat
Luit Item - AI Main		ASSA AE
1201/1		
Edit Tools	and the second	and the second
tails Features	History	
Reason Logging		
 Custom Message 		
 Notes Logging 		
- Fuel Logging		
Mode:	Forced On for Return	
Fuel Level:		
	Empty 40% Full 40%	
Distance Logging		
Mode:	Forced On for Return	
Total Distance:	6 Miles	
Location Logging		
Mode:	Forced On for Return	
	Main Car Park	
Current Location:		

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.

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, click on the 'Item Types' icon.

S
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123
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Ē
\$

2. The user will now be taken to the 'Item Types' page. After the required item has been selected, click on 'Edit'.

<u>.</u>	Item Types
0	Edit Customise Export
	Item Type Name
	Кеу
	Vehicle
	Page 1 of 1 (2 items) 🔣 🔇 🧕 📎 📎
	P <u>Create Filter</u>

3. At the 'Edit Item Type' page, click on the 'Features' tab as shown.

Edit Iten	n Type - Key			
Edit	2			
Туре	Reasons	Features	History	
Distance Lo Logging Mod		Total Distance		
Units:		Miles		

4. Clicking on the 'Logging Mode' drop down menu will provide two options; 'Total Distance' and 'Trip Distance'.

HPQ Edit	2		
Туре	Reasons	Features	History
Distance L	ogging		
Distance L Logging Mo		Total Distance	
		Total Distance Total 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. Click on the Traka Touch screen to activate the system.



2. Access the system using a keypad ID, Swipe Card or Finger Print.

			aka A ABLOY
To access the system, enter your ID or press Search to find an item			
	1	2	3
***	4	5	6
	7	8	9
Search Help New PIN	\mathbf{X}	0	L.

3. Depending on what level of access a user has been granted, click on 'I Know What I Want'.

	traka Assa ABLOY
Welcome Dave Jones, please select an option below:	
I Know What I Want	
Reports Admin	Logout

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.

4. Click on 'OK' and the item will be released.

08/06/2016 12:10:20	traka ASSA ABLOY
Pos 1: Silver Ford Focus	
The Item has been left in the following location Main Car Park	
ОК	
	Pos 1: Silver Ford Focus The Item has been left in the following location Main Car Park

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'.

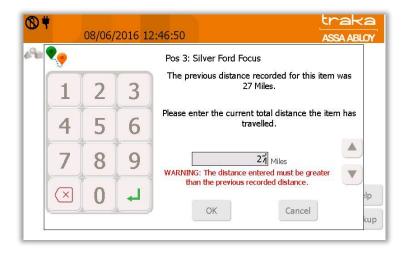
If the logging mode selected was for 'Trip Distance', the user will be required to enter the distance travelled on that trip.

1	4	09/06/	2016 09):18:32 ASSA ABI	
~				Pos 1: Silver Ford Focus	
	1	2	3		
	4	5	6	Please enter the distance travelled on this trip.	
	7	8	9	12 Miles	
	$\overline{\times}$	0	L.	OK	elp kup

If the logging mode selected was for 'Total Distance', the user will enter the total current distance travelled against the previous distance.

1	ł	08/06/	2016 12	2:28:41 Lraka Assa Abloy
49				Pos 1: Silver Ford Focus
	1	2	3	The previous distance recorded for this item was 10 Miles.
	4	5	6	Please enter the current total distance the item has travelled.
	7	8	9	
	$\overline{\times}$	0	4	OK Cancel kup

NOTE: If the user enters a current total distance that is less than 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.



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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.

1	ł	09/06/	2016 10):09:05 Lraka
4				Pos 6: Transit Van 1
	1	2	3	The previous distance recorded for this item was 8 Hours.
	4	5	6	Please enter the current total distance the item has travelled.
	7	8	9	1¢ Hours
	\mathbf{X}	0	لم	OK Cancel kup

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.

1	ţ	09/06/	2016 10):04:47 Lraka Assa Abloy
69				Pos 6: Transit Van 1
	1	2	3	The previous distance recorded for this item was 8 Hours.
	4	5	6	Please enter the current total distance the item has travelled.
	7	8	9	K Hours WARNING: The distance entered must be greater
	\mathbf{X}	0	4	than the previous recorded distance.

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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.

S ♥ ■ 20/07/2018 11:57:32			aka A ABLOY
To access the system, enter your ID or press Search to find an item			
	1	2	3
****	4	5	6
	7	8	9
Search Help New PIN	\mathbf{X}	0	L

At the Search screen a user can use the alphanumeric keypad to input the name of a specific item followed by the Enter key, or simply click on Show All.

8 #											tr	aka
		09/0	6/20	16 16	:20:5	7					AS	SA ABLOY
	Se	earch										
	Tc by	sear ENT	ch fo or to	r an i shov	tem, v a lis	type at of a	any p all iter	oaram ms pr	eter ess S	belov how	v follov All:	ved
	1	2	3	4	5	6	7	8	9	0		
12?	q	w	e	r	t	v	u	i	0	р	+	
	0	+	-	s	96	&	*	()			
A			d	4	-	h		k			*	
	a	S	a	Г	g	1	J	N				
	<u>a</u>	S	a .	1 ;	<u>y</u>	n			/	• •	?	Show Al
+	a z	x	c	r ; v	g	Space		b	n	• • m	7	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.

() † () 16/06/2	016 11:22:3	3	tr ASS	aka A ABLOY
Search				
Search res	ults for: Sho	w All		
en Last Time Returned	Due Back Fuel	Distance	Location	
16/06/2016 10:50:00	60%	77651 Kilometres	Bay C1	1/40
16/06/2016 10:55:06	80%	5506 Kilometres	Bay A3	
16/06/2016 10:55:53	10%	8 Kilometres	Bay N1	Again?
16/06/2016 10:56:38	40%	11251 Kilometres	Bay C5	
16/06/2016 10:57:24	90%	110423 Kilometres	Bay K7	
06/06/2016 10:13:09	15%	29213 Kilometres	Bay D5	
06/06/2016 10:13:10	65%	924074 Hours	Terminal 1, Gate A1	
08/06/2016 15:03:27	67%	135089 Kilometres	Lymington Linkspan 2	
06/06/2016 10:13:11	20%	115123 Hours	Terminal 3, Gate B5	
06/06/2016 10:13:11	25%	85342 Miles	Bay C32	Exit

6.8.2 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' icon on the Navigation Toolbar.



The Reports screen will now be displayed as shown below.

F F	Reports	traka ASSA ABLOY
	General	
	Status	
	Exceptions	
	Permissions	
	Regions	
	Reasons	
	Fuel	
	Distance	
	Location	
	Utilisation	
	Diagnostics	

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 panel and then click on View This Report.



The Fuel Level Report will now be displayed as shown below.

Current	Fuel	Level Report				
	H T	Export				
System 🔺 😔	Pos. 🔺	Description 📿) Status 📿) Who 📀	Fuel Level 📀	Difference
Reception	1	Silver Ford Focus	In System	Dave Jones	30%	-20%
Reception	2	Red Ford Focus	In System	Dave Jones	20%	-20%
Reception	3	Silver Ford Focus	In System	Dave Jones	<mark>4</mark> 0%	-20%
Reception	4	Silver Mercedes	In System	Sarah Brown	30%	-10%
Reception	5	Grey Audi	In System	Sarah Brown	70%	-20%
Reception	6	Transit Van 1	In System	Dave Jones	80%	-20%

6.8.2.2 DISTANCE REPORTS

1. To view the Distance reports, click on the Distance panel.

You will notice that there are two reports to choose from; Current Distance Report and Activity Distance Report.

Distance					
Current Distance Report					
Activity Distance Report					

Current Distance Report

1. To view the Current Distance Report, click on the panel and select View This Report.

	Distance Report		
I DIS KEDOT	iis Report		
inis Report	iis Report		

The Current Distance Report will now be displayed as shown below.

									ASSA ABLO
	H T	Export					_		
System - 😒	Pos. *	Description 📀	Status	\odot	Who	\odot	Tag No.	Total Distance 📀	Last Trip Distance
TKC37203	1	VolkswagenGolf - AA11-AAB	In System		Super Admin		1	305 Miles	275 Miles
TKC37203	2	VolkswagenGolf - AA11-AAA	In System		Super Admin		2	509 Miles	459 Miles
TKC37203	3	VolkswagenBeetle - AABA- ABC	In System		Super Admin		3	600 Miles	199 Miles

Activity Distance Report

1. To view the Activity Distance Report, click on the panel and select View This Report.

Distance					
Current Distance Report					
Activity Distance Report					
View This Report					
Total Distance and Last Trip Activity Report					

The current Activity Distance Report will now be displayed as shown below.

Activity Di	istance Rep	oort						tral ASSA AE	
Customise			Solution (10/20) [10/20] [9 Start Date		⊙ 17/03/2020 21:59 E	nd Date	
When	System 🛇	Pos.	Who	\odot	Description	\odot	Total Distance	Last Trip Distance	\odot
15/02/2020 15:00:00	TIL36587	2	Super Admin1		this is the description for	fob 2	120 Miles	123 Miles	
15/02/2020 15:00:00	TIL36587	2			this is the description for	fob 2	120 Miles		
15/02/2020 15:00:00	TIL36587	3	Super Admin1		this is the description for	fob 3	55 Miles	50 Miles	
4									
Page 1 of 1 (3 items)		»						Page size: 2	0 🔽

6.8.2.3 LOCATION REPORT

1. To view the Location report, click on the 'Location' panel and then click on 'View This Report'.



The Current Location Report will be displayed as shown below.

Current	Locat	tion Report				
	H T					
System 🔺 😔	ustomise Pos. •	Description	Status 📀	Who 📀	Current Location	Previous Location
Reception	1	Silver Ford Focus	In System	Dave Jones	Hotel Parking	Main Parking
Reception	2	Red Ford Focus	In System	Dave Jones	Main Car Park	Airport Parking
Reception	3	Silver Ford Focus	In System	Dave Jones	Main Car Park	Hotel Parking
Reception	4	Silver Mercedes	In System	Sarah Brown	Main Car Park	Train Station
Reception	5	Grey Audi	In System	Sarah Brown	Main Car Park	Main Site
Reception	6	Transit Van 1	In System	Dave Jones	Main site	Main Site

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' panel.

	ieneral								
	Status								
	Exceptions								
	Alarms Report								
	Illegal Handover Report								
,	Not Seen In A While Report								
	Overdue Report								
	Data Entry Exception Report								

2. Now click on the Data Entry Exception Report and then click on 'View This Report'.

•	Alarms Report
ĸ	Illegal Handover Report
ĸ	Not Seen In A While Report
Ě	Overdue Report
	Data Entry Exception Report
ſ	View This Report

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The Exceptions report will now be displayed as shown below.

lave Jones	Distance Not Entered	11
lave Jones	Fuel Level Not Entered	2
lave Jones	Location Not Entered	2
ob	Distance Not Entered	7
ob	Fuel Level Not Entered	5
ob	Location Not Entered	4
arah Brown	Distance Not Entered	1
arah Brown	Fuel Level Not Entered	1
arah Brown	Location Not Entered	1
teve Adams	Distance Not Entered	1
		•

6.8.3 OVERRIDING 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.

Edit Item - A1 Main Ca	r Park	traka ASSA ABLOY
Details Features	History	
Reason Logging Custom Message		
Notes Logging		
Fuel Logging		
Fuel Level:	Forced On for Return	
Distance Logging		
Mode: Total Distance:	Forced On for Return 6 Miles	
Location Logging		
Mode:	Forced On for Return	
Current Location:	Main Car Park	
Curfew		

NOTE: The Fuel Level can only be adjusted using the up and down arrows.

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 OVERRIDING LOGGING AT TRAKA TOUCH

It is possible to override the fuel, distance and location values within the 'Item Administration' screen in Traka Touch.

1. After logging in to the Traka Touch system, click on 'Admin'.



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2. Now click on the 'Items' button.

¥	22/08/20	19 10:03:	28			°aka sa ablov
¢.	Administra	TION MAC A	No.: TKC34630 ddress:04-CB-1D-8		Battery backup capa	city -
	Scan for documentation	OS Buil SQL CE	rsion: 02.03.0000.0 Id version: 4.3 : DB version: 1.0.58 version: 2.6.9 (16/:		Flash disk used spac	-
8	www.traka.com/qr	DV FW	version: 3.1.1 (15/	01/2018)		
Users	Items	General	Network	Reader	Config	
Ð			¥	?		
Alarms	Clock	Data	Power	Help	Diag	Exit

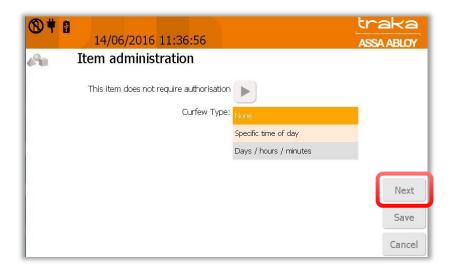
3. At the next screen, select the item for editing and then click on the 'Edit' button.

® #	14/06/	2016 11:35:09				aka ABLOY
<u> </u>	Item adr		All Items			
Home	Serial Number	Description		Status	Slot	Cathan
1	324975030000	Silver Ford Focus		In	1	Setup
2	E94862050000	Red Ford Focus		In	2	Edit
3	682C62050000	Silver Ford Focus		In	3	
4	B58C63050000	Silver Mercedes		In	4	Remove
5	1BED61050000	Grey Audi		In	5	-
6	724C62050000	Transit Van 1		In	6	
7	35AB61050000	Transit Van 2		In	7	
8	C64962050000			In	8	
9	D6F04F050000			In	9	Export
10	7C5264050000			In	10	Lxport
						Exit

4. At the 'Item Administration' screen, click on 'Options'.

1	2										٤	raka
	14/06/2016 11:35:43									A	SSA ABLOY	
1	See Item administration											
	Position: 1 Serial No.: 324975030000											
	Descripti	on: Silv	ver Ford	Focus								
												-
		2	3	4	5	6	7	8	9	0		
12?	1								,		*	
	Q	W	E	R	Т	Y	U	I	0	Р		Options
A	e	+	=	\$	%	8.	*)	1	4	Options
A	A	S	D	F	G	Н	J	К	L			Save
	•	-		1				1	/	¥	?	Jave
*	Z	X	с	V		Space		В	N	М	1	Cancel

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.

®# (14/0 em a		16 11 lietra		4						Iraka ASSA ABLOY
			Level : stance :	En 6	npty- Car Pa		– Ful Miles	1	40	%		
1	2	3	4	5	6	7	8	9	0		aBc	
	1	:	;	!	"		&	@	%	1/2	*	Details
+	-	* /	=	<	>	()	\$ €	£	¥	¢	Cancel

6.9 ITEM HANDOVER

6.9.1.1 ITEM HANDOVER

Item Handover is a cost option that allows a user who has access to the system to 'handover' 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 others staff members throughout the business, but don't want the secondary staff member to have access to the system.

Enabling 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.

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 'handover'.

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 ID's, Card ID's PIN's 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 'handover'.

Setting up the Users

If you need to add new users to your database please refer to the Adding Users section.

- 1. From the navigation toolbar at the bottom of TrakaWEB, select the Users Button.
- 2. Highlight the desired User. If you need to add a new user, click the Add button.
- 3. Select the Edit button or double click the user.
- 4. Navigate to the System Access tab.

The grid displaying the users' system access will have a column called Item Handover. The drop down selection box consists of the following options.

Effective 😔	System 🔹 😒	Region 🕑	Active 😒	Admin 😒	Reports 😔	Allowance	۲	No. of Items	Item Handover	🛛 0
	TKC22120	Default	V	Ø	×	Unlimited		10	Allow Handover	
4 III					1	1410			None	
Door Loft (1)	terns) 🔞 🎯	0.0					Do		Allow Handover	
Page 10: 1(1)	Harron Man Mari	1 10 10					Pa	ge size:	Receive Handove	er 🛛
									Allow and Receiv	e Handow

- 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 & Receive Handover Allows a user to both handover 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.

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5. 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.

eypad ID notilinant ID IN IN Espiry Date IN Force Chart regent Enrolled	pe:	29,00,2044 13 0	ć	Exp are Hab	e, Date: ny Date: fortun: a NetFLEDs: net Expany Date	~	29/06/	2044	2	
Effective (V)	livani - V	Nom 🕤	áctm. 🐨	Autren 🐨	NOTE C	Nineran .	.0	No. of Terror	thm Handbill	(9)
-	5(022120	Derhult	8	0		Uninvited -	-	10	A starve Handov	-

- 6. After making your selection, click the Save & Return button.
- 7. You will need to repeat this process for any users that need to be handover authorisers/recipients.

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.

	State of the second second	traka
	29/08/2014 14:22:29	ASSA ABLOY
ñ .	Aaron Kennedy	
G	Please select the name of the person you are over to:	e handing the item
	Paul Robinson	
	Paul Robinson	
	Paul Robinson	Menu
	Continue Cancel	Menu Help

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.



Activities

The <u>system viewer</u> 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 Item Activity tab. When the user returns the item, another Item Handover activity will be generated with the recipients.

Item Activity (IFob	Activity IFob Ac	cess System .	Activity Iter	ns
Activity	😒 wł	ien	▼ Who	\odot
Item Returned	29,	/08/2014 15:16:3	1 Aaron	Kennedy
Item Handover	29)	/08/2014 15:16:3	0 Paul P	labirsan
Item Handover	29)	/08/2014 14:22:3	9 Aaron	Kennedy
Item Removed	29)	/08/2014 14:22:3	6 Aaron	Kennedy
4				,
3 1 🔊		Page size:		20 🔽

Reports

You can run a report that shows items that were taken from the system and handed to another user through the Item Handover feature. Please refer to the <u>Item Handover Report</u> section.

6.10 RANDOM RETURN TO MULTIPLE SYSTEMS (RRMS)

6.10.1 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: That once an item is 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 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

6.10.2 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. 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 a fixed return system due to the Item not having a fixed home, which in turn makes it harder to work out which key is which. In fixed return 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. 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 fixed return or random return to a single system deployment.

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6.10.2.1 RRMS CONSIDERATIONS

Once the RRMS configuration has first been setup, only an admin user will be able to remove and return Items. A nonadmin user will only be able to remove and return Items once the User and Items have been assigned to a Common Item Access Group.

6.10.2.2 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 Logging 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
- Location Logging
- Custom Messages

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 toolbar button 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** on the Navigation Toolbar.



			Tag Description			
•	New System	1		In System	Rob	19/06/201 11:08:09
•	New System	2		In System	Rob	19/06/201 11:08:14
٠	New System	3		In System	Rob	19/06/201 11:08:21
•	New System	4		In System	Rob	19/06/201 11:08:28
٠	New System	5		In System	Rob	19/06/201 11:08:34
٠	New System	6		In System	Rob	19/06/201 11:08:40
•	New System	7		In System	Rob	19/06/201 11:08:46
٠	New System	8		In System	Rob	19/06/201 11:08:51
•	New System	9		In System	Rob	19/06/201 11:08:58
•	New System	10		In System	Rob	19/06/201 11:09:04

At the iFobs screen, you will see a list of all the current iFobs in the selected system.

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** icon on the ribbon toolbar. Alternatively, multiple checkboxes can be selected to assign Tag Numbers automatically in sequential order. By clicking outside of a checkbox and then holding the shift key and clicking outside a checkbox further down the list, all the checkboxes in between will be selected as shown below.

	0	New System	1	1	In System		19/06/2010 14:45:10
	۰	New System	2		In System		19/06/2010 16:44:35
•	۲	New System	3		In System	Sarah Smith	19/06/201 16:45:56
	۲	New System	4		In System	Sarah Smith	19/06/201 16:46:03
	۲	New System	5		In System	Sarah Smith	19/06/201 16:46:08
2	٠	New System	6		In System	Sarah Smith	19/06/201 16:46:12
~	٠	New System	7		In System	Sarah Smith	19/06/201 16:46:17
2	۲	New System	8		In System	Sarah Smith	19/06/2010 16:46:22
•	۲	New System	9		In System	Sarah Smith	19/06/201 16:46:26
•	a second	New System	10		In System		19/06/2011 16:44:36

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.

Set Tag Numbers		
First Tag Number:	1	
Overwrite Existing Tag Numbers:		
Allow Duplicate Tag Numbers:		
10 iFob(s) selected		
Ok	Cancel	

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.

Set Tag Numbers		
Tag Number allocat	n has completed with the following results:	
• Number of Fobs s	ccessfully allocated tags: 10	
• Number of iFobs v	hich failed to get tag allocation: ${f 0}$	
	Ok	

The iFobs screen will now display the newly created Tag Numbers. This process can be repeated to add Tag Numbers to iFobs as required.

			Tag No.			
	New System	1	1	In System		19/06/201 14:45:10
0	New System	2	2	In System		19/06/201 16:44:35
-	New System	3	3	In System	Sarah Smith	19/06/201 16:45:56
0	New System	4	4	In System	Sarah Smith	19/06/201 16:46:03
	New System	5	5	In System	Sarah Smith	19/06/20 16:46:08
0	New System	6	6	In System	Sarah Smith	19/06/20 16:46:12
0	New System	7	7	In System	Sarah Smith	19/06/20 16:46:17
Q.	New System	8	8	In System	Sarah Smith	19/06/201 16:46:22
1	New System	9	9	In System	Sarah Smith	19/06/201 16:46:26
*	New System	10	10	In System		19/06/201 16:44:36

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 Toolbar.

1. Click on the checkbox for the iFob or iFobs with the Tag Number you wish to remove and then click on the **Edit** button.

	it 🧳		stomise	Export	(All Regions)	Region	\odot) (All Systems)	System	
	Sync	System 🔺 😔	Pos. 🔺	Tag No. Description		Status	\odot	Who	\odot	When
~										19/06/201 11:08:09
	٠	New System	2			In System		Rob		19/06/201 11:08:14
	٠	New System	3			In System		Rob		19/06/201 11:08:21
	•	New System	4			In System		Rob		19/06/201 11:08:28
	٠	New System	5			In System		Rob		19/06/201 11:08:34
	•	New System	6			In System		Rob		19/06/201 11:08:40
	•	New System	7			In System		Rob		19/06/201 11:08:46
										19/06/20

At the Edit iFob page, you can now change the Tag number as shown below:

ails Feature	es Items History	
/stem		
ome System: ome Position:	No System	
urrent System:	New System	
urrent Position:	1	
atus:	In System	
erial Number:	1BED61050000	
etails		
anual Description:		
escription:		

2. Once completed, click on Save & 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 **section 4.4.6**

NOTE: The 'Common Group' option will only appear if one or more systems are configured with RRMS in the TrakaWEB database.

1. Select Item Access Groups from the Items menu on the Navigation Toolbar.



- 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 and then click on Save.

n Access Group 1

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.

H P 2	
Details	n Item Access History
Name:	Item Access Group 1
Everyone Group:	
Common Group:	A Common Item Access Group allows similar items to be grouped together with a common access right. Items can only be a member of a single Common Item Access Group.

4. 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.

	Region Item Access History	
Access 📀	Region	• 🛇
V	Default	
v	Reception	
	Research & Development	

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 <u>Section 4.6.1</u>.

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.

5. After making a selection, click on the **Item Access** tab.

H P 2				
Details	Region	Ite	m Access	History
Name:		Item Acc	ess Group 1	
Everyone Group:				
Common Group:				non Item Access Group allows similar items to be grouped together with a common access right an only be a member of a single Common Item Access Group.

You will now be taken to the Edit Item Access Group page where you can add iFobs to the selected Item Access Group.

6. Click on the checkboxes to assign the iFobs to the Item Access Group.

ails	Region		Iten	n Access	1	listory					
Grant	All Revol	ce All									
			Tag No.						Detail 5		
~											
~	New System	2	2			1				Key	
~	New System	3	3							Кеу	
	New System	4	4							Кеу	
~	New System	5	5							Key	
	New System	6	6							Кеу	
	New System	7	7							Кеу	
	New System	8	8							Кеу	
	New System	9	9							Key	
	New System	10	10							Key	
4											

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.

7. Once completed click on Save & Return to be redirected back to the Item Access Groups list.

6.10.7.1 ASSIGN USERS TO COMMON GROUPS

With the iFobs now 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.

Users are created in the usual method within TrakaWEB.

NOTE: Due to RRMS limitations, the System Access page contains fewer details.

1. Select a user from the Users page that you wish to edit.

2. At the Edit User page, click on the **Item Access** tab.

H P 2 Edit		
Details System	Access Item Access	Region Access Web Access History
User		
Forename:	Dave	
Surname:	Jones	
Display Name Override:		
Display Name:	Dave Jones	

3. At the next page, select which Item Access Group you wish to allocate to the user.

ails	System	Customi		n Access	ort	legion Access	Web Acc	000	Hist	ype onv				
uno	System		nen	1 Access		egion Access	WED ALL			ory				
em Acc	cess Groups													
Access	Name								-	Everyone	Group 🛇	Comr	non Grou	p 📀
~			1										⊻	
	Item Acce	ss Group	2										\checkmark	
4													G	LO 🔽
													13	
	f 1 (2 items) 🔇	331	00							Page size	d.		12	10
Page 1 of P <u>Create</u> cem Acc	Filter	001	00							Page size	d.			
P <u>Create</u>	Filter	ke All	Tag No.	Detail 1	Solution	Detail 2) Detail 3	\odot	Detail 4		Detail 5	\odot	Туре	.u 💌
<u>ereate</u> cem Acco Grant	Filter cess All Revol	ke All	Tag	Detail 1		Detail 2) Detail 3	\odot	Detail 4			\odot		
♥ <u>Create</u> cem Acco Grant Access	Filter cess All Revol	ce All Pos. 🔺	Tag No.	Detail 1		Detail 2 📿) Detail 3	\odot	Detail 4			\odot	Туре	
<mark>♥ <u>Create</u> cem Acco Grant Access</mark>	Filter Cess All Revol System ~ (~) New System	ce All Pos. 🔺 1	Tag No. 1	Detail 1		Detail 2 🔇) Detail 3	\odot	Detail 4			\odot	Туре Кеу	
© Create Cem Acco Grant Access ✓	Filter Cess All Revol System + (>) New System New System	re All Pos 1 2	Tag No. 1	Detail 1		Detail 2) Detail 3	\odot	Detail 4			\odot	Type Key Key	
Create	Filter Cess All Revol System New System New System New System	re All Pos. ~ 1 2 3	Tag No. 1 2 3	Detail 1	Solution	Detail 2) Detail 3	×	Detail 4			 Image: Second sec	Type Key Key Key	

4. Once you have made your selection, click on Save and Return.

6.10.8 TRAKA TOUCH - 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. Click on the Items icon within Items on the Navigation Toolbar.



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The Items page will show a list of details for all iFobs/Items in each available System.

2. Click on the **Search For** icon on the Ribbon Toolbar.

You can now enter search details for each column in the grid. For more information on Searching, refer to section 4.1.1.1.

🛨 🤔 💥 Edit		Cust	TI 🗶	Export		ons) egion	(All Syst	ems) stem	(All Type) ⊤	s) ype
Drag a column	header hei	re to grou	p by that colum	n						
System 👻 🛇	Pos.	Tag No.	Detail 1 📀	Detail 2 🛇	Detail 3 📀	Detail 4 📀	Detail 5 😔	Status 📀	Who 🛇	When
9					9		•	•	?	
New System	9	9						In System	Sarah Smith	19/06/2018 16:46:26
New System	2	3						In System	Dave Jones	21/06/2018 10:19:16
New System	1	5						In System	Dave Jones	21/06/2018 11:18:53
New System	6	6						In System	Sarah Smith	20/06/2018 14:34:50
New System	8	8						In System	Dave Jones	20/06/2018 15:47:16
New System	5	5						In System	Dave Jones	22/06/2018 15:56:12
New System	3	2						In System	Dave Jones	21/06/2018 10:19:13
New System	10	10						In System		19/06/2018 16:44:36
Maw System	7	7						To System	Carab Cmith	10/06/2018 16:46:17

Locating Items in Traka Touch can be done using the Search function.

3. Tap **Search** on the Touch screen.

			aka A ABLOY
To access the system, enter your ID or press Search to find an item			
	1	2	3
	4	5	6
	7	8	9
Search Help New PIN	\mathbf{X}	0	L

4. At the Search screen, enter the details for the Item you wish to locate or tap on Show All.

® #		29/0	6/20:	18 09	:00:4	8						raka SSA ABLOY
	Se	earch										
		sear ENT										wed
	1	2	3	4	5	6	7	8	9	0		P.
12?	q	w	е	r	t	у	u	i	0	р	*	
	0	+	=	s	96	8.	*	()	1	-	
A	a	s	d	f	g	h	j	k	I			Show All
		*	-	3				:	1	/	?	SHOW AI
	z	x	с	v	Space			b	n	m	,	Exit
					0	••						

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Depending on your choice of search option, the next screen will display a list of results.

1	Ÿ	2	29/06/201	8 09:15:26				aka ABLOY
	>	Sea	rch					
		Sea	rch results	s for: Show	v All			
Slot	Tag	Status	Description	Current User	Last User	Last Time Taken	Last Time	
1	5	In			Dave Jones		21/06/201	1/10
2	3	In			Dave Jones		21/06/201	· · · ·
3	2	In			Dave Jones		21/06/201	Again?
4	4	In			Dave Jones		20/06/201	
5	5	In			Dave Jones		22/06/201	
6	6	In			Sarah Smith		20/06/201	
7	7	In			Sarah Smith		19/06/201	<u> </u>
8	8	In			Dave Jones		20/06/201	
9	9	In			Sarah Smith		19/06/201	
10	10	In						Exit

6.10.9 DELETING 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 Toolbar.
- 2. Select the Item Access Group you wish to delete and click on the delete button.

Edit Customise	Region	
Name	◆ Everyone Group 📎	Common Group 💮
		v
item Access Group 2		
Page 1 of 1 (2 items) 🔣 🔇 1 🔊 🔊		Page size: 20

At the next page, you will be asked to confirm that you want to delete the selected Item Access Group.

3. Click on the Delete button to continue.

Details	
Please confirm you want to delete the item access group	
Item Access Group 1 Delete	

6.10.10 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.

8	¥.	21/06/2018 Item adminis			ASSA ABLOY
Slot	Tag	Serial Number	Description	Status	
1 2	5 3	1BED61050000 724C62050000		In In	
3	2	35AB61050000		In	
4	4	B58C63050000		In	
5	1	7C5264050000		In	
6	6	682C62050000		In	
7	7	E94862050000		In	
8	8	C64962050000		In	
9	9	D6F04F050000		In	
10	10	324975030000		In	
					Exit

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 cabinet to that which the keys were removed from.

The Temporary Key Store cabinet maybe 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 maybe placed in the Temporary Key Store cabinet 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, Real Time 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.

6.11.1 LIMITATIONS

The Temporary Key Store feature is compatible with the following:

- Key Control Products
- Random Return 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 maybe 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 <u>Random Return to Multiple Systems</u> section of this document for more information on setup up and configuration of RRMS.

6.11.3 USING TEMPORARY KEY STORE

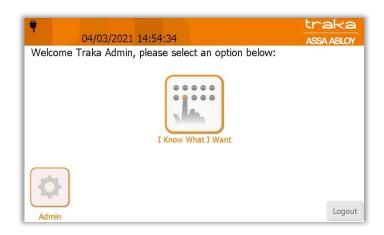
A user will be able to deposit multiple items that they have been granted access into the Temporary Key Store. By using the I Know What I Want functionality on Traka Touch, they will in return be able to remove those items as required.

Only the user who deposited the items to the Temporary Key Store maybe 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 out.

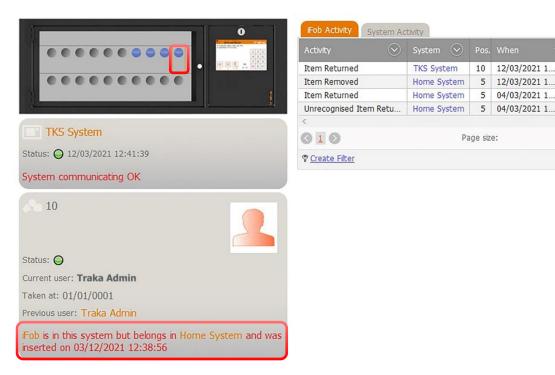
When a user returns to the system to remove items, they will only be allowed to take items that they originally deposited. Items in red represent Items that have been deposited by other users. This rule will apply to all users unless they have been given the override permission.



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.

000000000	Fob Activity Fob Acces		System Activity	Who	$\overline{\mathbf{e}}$
	Item Removed	10	05/03/2021 1	Traka Admin	0
	Item Returned	10	05/03/2021 1	Traka Admin	
	Item Removed From Wr	8	05/03/2021 1	Traka Admin	
	Item Returned To Wron	8	05/03/2021 1	Traka Admin	
	Item Removed	10	04/03/2021 1	Traka Admin	
	Item Returned	10	04/03/2021 1	Traka Admin	
	Item Removed	10	04/03/2021 1	Traka Admin	
	Item Returned	10	04/03/2021 1	Traka Admin	
	Item Removed	10	04/03/2021 1	Traka Admin	
	Item Returned	10	04/03/2021 1	Traka Admin	
	Unrecognised Item Retu	10	04/03/2021 1		
	<				
Home System	310		Page size:		20
Status: 🔾 08/03/2021 11:33:33	P Create Filter				
312103. 0 00/03/2021 11:33:33					
System communicating OK					
A 10					
Status: 🕒					
Status: O Current user: Traka Admin Taken at: 03/05/2021 10:13:25					
Current user: Traka Admin					

A record of items placed in the Temporary Key Store system can be viewed by selecting a deposited item at the System Viewer page.



Selecting the iFobs Icon from the Navigation Toolbar will also provide information as to which iFobs are currently out of the system and their location in the Temporary Key Store.

Ec			tomise	Export	(All Regions)	Region	0) (All Systems)	System	
0	Sync	System 👻	Pos. 🛇	Tag Description	n 📀	Status	\odot	Who	\odot	When
	۲	TKS System	8			In Temporary Key Store		Traka Admin		12/03/2021 11:30:49
	•	TKS System	9			In Temporary Key Store				
	•	TKS System	10			In Temporary Key Store				
	•	TKS System	7			In Temporary Key Store		Traka Admin		12/03/2021 11:31:14
	۲	Home System	39			In System				04/03/2021 11:12:23
	•	Home System	29			In System				04/03/2021 11:12:22
	٠	Home System	17			In System				04/03/2021 11:12:21
	•	Home System	56			In System				04/03/2021 11:12:25

Traka Admin

Traka Admin

-

20

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 Toolbar, 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, scroll to the right of the system access grid and place a tick in the checkbox for **Temporary Key Store Override.**

n. rride 🛇	Item Handover 🛛 😒	Curfew	Item Booking Override	Item Access Schedule Override	Temporary Key Store Override
	None 🗾	None 🗸			
< Page 1 d	of 1 (2 items) 🔣 🔇	100	Page	size:	20 🔽
🕈 <u>Create</u>	e Filter				

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.

4. Once completed, click on Save & Return.

The selected User will now have the 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.

ŧ		traka
	12/03/2021 12:13:52	ASSA ABLOY
8	User administration	
	Summary of feature specific roles applied to this user. Note: These roles can only be granted or revoked from Traka Roles Authoriser	Web.
	Authorisation Override	
	Emergency Open	
	Temporary Key Store Override	Options
	ок	Save
		Cancel

6.12 REPORTS

6.12.1 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 Activity Reports, navigate through the **Activity** menu as shown and place a tick in the checkbox for **Temporary Key Store Override.**

	ty Report will only return a maximum act the filter parameters below:	of 60000 records			
tep 1: Sel	lect Date Range				
Date From:	12/02/2021 00:00:00	Date To:	12/03/2021 23:59:59 🕎		Duration: 29 days
tep 3: Sel	egory:* Fob; Release; Return	ction		Activity:*	Temporary Key Store Override
Regions:	Default			System:	Taily Fob inserted but Dock Door was open Temporary Key Store Overnde
User:		-			Unauthorised Item Removed Unauthorised Item Returned Unidentified Item Charge Fault Cose

2. 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.

Date From: 12/02/2		Date	To: 12/	03/2021	Activit Return	y Category: iFob, Relea	See, Activity: Temporary Key Store Override
		Pos.	Tag No	Description	\odot	Activity 🛇	Who
When •	TKS System	9	NO			Temporary Key Store Override	Traka Admin

6.12.2 CURRENT ITEM STATUS REPORT

A Current Item Status Report may be viewed by selecting the tab from the Status menu in Reports.

		Tag No				
KS System	8			In Temporary Key Store	Traka Admin	12/03/2021 11:30:49
TKS System	9			In Temporary Key Store		
TKS System	10			In Temporary Key Store		
TKS System	7			In Temporary Key Store	Traka Admin	12/03/2021 11:31:14
Home System	39			In System		04/03/2021 11:12:23
Home System	29			In System		04/03/2021 11:12:22
Home System	17			In System		04/03/2021 11:12:21
Home System	56			In System		04/03/2021 11:12:25
Home System	25			In System		04/03/2021 11:12:22
Home System	32			In System		04/03/2021 11:12:23
Home System	24			In System		04/03/2021 11:12:22
Home System	12			In System		04/03/2021 11:12:21
Home System	28			In System		04/03/2021 11:12:22
Home System	43			In System		04/03/2021 11:12:24
Home System	9			In System	Traka Admin	12/03/2021 11:31:21
Home System	35			In System		04/03/2021 11:12:23
Home System	36			In System		04/03/2021 11:12:23
Home System	10			In System	Traka Admin	12/03/2021 11:31:26
Home System	59			In System		04/03/2021 11:12:25
Home System	21			In System		04/03/2021 11:12:21
(an operation		

6.12.3 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 **TD0013-TrakaWEB Installation and Configuration Guide.**

All Triggers			
	Release Notes Not Entered		\checkmark
	Release Reason Entered		
	Release Reason Not Entered		\checkmark
	Remote Release of Position		
	Remote Release To User of Position		
	Request To Open Dock Door Accepted		
	Request To Open Dock Door Rejected		
	Return Message Confirmed		
	Return Message Not Confirmed		~
	Return Notes Entered		
	Return Notes Not Entered		~
	Return Reason Entered		
	Return Reason Not Entered		V
	Spare Item Not Removed		V
	Tally iFob inserted but Dock Door not cycled		
	Tally iFob inserted but Dock Door was open		
~	Temporary Key Store Override		
	Unauthorised Item Removed		×
	Unauthorised Item Returned		V
	Unidentified Item Charge Fault		1
e 5 of 6 (108 i	tems) 🔇 🤇 1 2 3 4 5 6 👂 ≫	Page size:	20

6.13 ITEM PAIRING

6.13.1 OVERVIEW

Item Pairing is a powerful security feature 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.

It 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.

6.13.2 ITEM PAIRING: FRSS OR ADVANCED FIFO

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 <u>Advanced First In-First Out</u> (AFIFO) mode.

Should you require a change to your chosen configuration, please contact Traka or your Distributor.

6.13.3 LIMITATIONS

NOTE: At the moment, the Item Pairing feature is only available for Key Management systems.

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)
- <u>Random Return to Multiple Systems</u> (RRMS)
- <u>Temporary Key Store</u> (TKS)
- DockSafe
- Rack Manager

6.13.4 ENABLE ITEM PAIRING

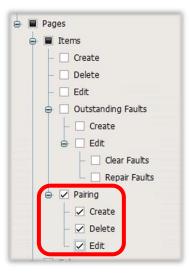
To enable Item Pairing on TrakaWEB, at least one of the systems connected to TrakaWEB must be configured to work with the Item Pairing function enabled. To enable Item Pairing for a specific system, you will need to upload an appropriate Config file onto that system.

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.

6.13.5 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**:



6.13.6 CREATE AN ITEM PAIRING RULE

1. To create an Item Pairing rule, select **Items** on the Navigation Toolbar. The menu will expand and reveal the **Item Pairing** sub-menu represented by the chain links icon:



2. TrakaWEB will then display all the current Item Pairing rules that exist within the database. Click on the **Create** button on the Ribbon Toolbar.

Pairing Rules			traka
			ASSA ABLOY
Edit Custor	nise Export		
0 Name	🕑 Rule	System	$\overline{\bigcirc}$
	No data to	display	
¢			>
No data to paginate 🛛 🔇 🔕 🔕			Page size: 20 🔽
♥ <u>Create Filter</u>			

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.

New Pairing Rule		traka Assa ABLOY
Edit		
Details		
Name:	Safe Key Rule	Rule Types:
Region:	Default 🗧	Lockout Pairing: Access to items is restricted when the associated paired item is out of the system
System:	Item Pairing System	Exclusive User Pairing: The same user cannot access both associated
Pairing Rule:	Exclusive User Pairing	paired items simultaneously
	Lockout Pairing	
	Exclusive User Pairing	

To decide which rule you should create, refer to the Item Pairing Overview section in this document.

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.

4. Once you have made your selection, click on **Save**.

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.

Saf	e Key Rule	traka Assa Abloy
Edit Details Items Histor	у	
Name: Region: System: Pairing Rule:	Safe Key Rule Default Item Pairing System Exclusive User Pairing	Rule Types: Lockout Pairing: Access to items is restricted when the associated paired item is out of the system Exclusive User Pairing: The same user cannot access both associated paired items simultaneously

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.

H P 🖉 🔍	Customise	Export		
etails Items	History	I export I		
🕜 Only showing it	ems for System 'Item Pai	rina System'		
			n be selected from the secondary column	
Primary	Secondary	Position 🔺	Description	\odot
		1	Description	
•	✓	2		
_		3		
		4		
		4		
		5		
		5		1

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**.

6.13.7 EDIT AN ITEM PAIRING RULE

1. To edit an Item Pairing rule, select **Items** on the Navigation Toolbar. The menu will expand and reveal the **Item Pairing** sub-menu represented by the chain link icon:



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 Toolbar or double-click on the selected rule to start editing it.

			trak ASSA ABI
x x zz			
► 🕑 Rule	\odot	System	\odot
Exclusive User Pairing		Etem Raring System	
			> Page size: 20
	► ⊙ Rule	Export Rule Exclusive User Pairing	Export System Exclusive User Pairing Reim Relating System

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.

Edit Pairing - Saf	e Key Rule	traka Assa Abloy
Edit Details Items Histo	ry	
Name:	Safe Key Rule	Rule Types: Lockout Pairing: Access to items is restricted when the associated paired
Region:	Default	item is out of the system
System:	Item Pairing System	Exclusive User Pairing: The same user cannot access both associated
Pairing Rule:	Exclusive User Pairing	paired items simultaneously

4. In the Items tab, change your selection of Primary and/or Secondary items in the Pairing Rule as required.

┨┏┛╝╺				ASSA		
Edit Customise Export						
etails Items	History					
Only showing it	tems for System 'Item Pair	ing System'				
-			an be selected from the secondary column			
	-	-	-			
Primary			Description	\odot		
	V	1				
		1				
		2				
		2				
		2 3 4		2		

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.

6.13.8 DELETE AN ITEM PAIRING RULE

1. To delete an Item Pairing rule, select **Items** on the Navigation Toolbar. The menu will expand and reveal the **Item Pairing** sub-menu represented by the icon of chain links:



2. TrakaWEB will then display all the current Item Pairing rules that exist within the database. Select one of the existing Item Pairing rules that you wish to delete and click on **Delete** on the Ribbon Toolbar.

🕂 🦾		e Export			
1	Name	 ✓ Rule 	\odot	System	\odot
~	Safe Key Rule	Exclusive User Pairing		Etem Pating System	

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3. A new page will display where you will be asked to confirm the deletion of the selected Item Pairing Rule. Select **Delete**.



The rule will be deleted, and you will be taken back to the main Item Pairing menu.

6.13.9 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).

6.13.9.1 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:

Edit Pairing - F	Exclusive User F	airing		tra
	.Acidsive Oser i	ainng		ASSA A
H P 2 0	Customise	Export		
Details Items H	istory			
	ns for System 'Item Pairin		n be selected from the secondary column	
Une item can be s	elected from the primar	/ column. One item cal	n de selected from the secondary column	
Primary	Secondary	Position 🔺	Description	\odot
×		1	3	
		2		
		3		
		4		
		5		
<		5		>
		5	Page size:	20
		5	Page size:	20 🔽

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 has only got 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.

⊗ ♥	23/05/2022 10:07:53	traka ASSA ABLOY
A	Traka User 01. Held:	
	1° 2° 3° 4° 5°	
		Help
		Lookup

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.

\\$	23/05/2022 10:10:33	traka ASSA ABLOY
A	Traka User 01 Held: 1	
	19 📀 🕉	
	4′ 5′	
		Help
		Lookup

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.

® †	23/05/2022 10:18:13	traka ASSA ABLOY
490	Traka User 01 Held: 2	
	4 2 5 2	
		Help
		Lookup

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).

\\$ ♥	23/05/2022 10:26:38	traka ASSA ABLOY
49	Traka User 02 Held:	
	67 67	
		Help
		Lookup

6.13.9.2 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:

Edit Pairing - Lo	ockout Pairing			trak Assa Abi
	Customise	Export		
	tory for System 'Item Pairing	g System'		
			an be selected from the secondary column	
Primary 📀	Secondary	Position 🔺	Description	\odot
Primary 📀	Secondary	Position - 3		\odot
Primary 📀	Secondary	Position ^ 3 4		\odot
Primary 📀	Secondary	Position - 3		\odot
Primary 📀	Secondary	Position ^ 3 4	Description	e size: 20 💽

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.

\\$\#	23/05/2022 10:07:53	traka ASSA ABLOY
49a	Traka User 01 Held:	
	() () ()	
	4 5	
		Help
		Lookup

2. The moment they have taken the item 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.

\&♥	23/05/2022 11:25:24	traka ASSA ABLOY
P	Traka User 01 Held: 3	
	42	
		Help
		Lookup

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.

®		traka
	23/05/2022 11:29:45	ASSA ABLOY
A	Traka User 02 Held:	
	4° 5°	
		Help
		Lookup

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.

23/05/2022 11:34:39	traka ASSA ABLOY
Traka User 01 Held:	
1 2 3	
4 57	
	Help
	Lookup
	Traka User 01 Held:

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.

\\$\#	23/05/2022 11:39:57	traka Assa Abloy
49	Traka User 02 Held: 5	
	(* 6* 6*	
	6 ° 5 °	
		Help
		Lookup

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.



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6.13.10ITEM 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**.

6.13.10.1 EXCLUSIVE ITEM PAIRING RULE

6.13.10.1.1 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:

Edit	Customise	Export		
tails Items	History			
 Only showing i 	tems for System 'Item Pa	iring System'		
-			n be selected from the secondary column	
Primary	Secondary	Position 🔺	Description	\odot
~		1		
	V	2		
		3		
		4		
		5		
<				

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.

New Item A	ccess Group	traka
Edit		ASSA ABLOY
Details Name:	Keys to Safe	
Everyone Group:		
Common Group:		A Common Item Access Group allows similar items to be grouped together with a common access right. Items can only be a member of a single Common Item Access Group.
Common Group Type:	First In First Out	() Warning: Items can only be a member of a single FIFO Group.
Region:	Default	
System:	Item Pairing System	
Allowance:	3	0 = Unlimited

All 5 items from the affected system have been assigned to that Common Item Access Group.

-		cess Grouj	p - Rej	73 10 00										AS	SSA /
Edit	?	Customise	*	Export											
tails Ite	m Access	Users Histo	ory												
 Only sho Only sho 	owing items fo	r system 'Item P System • 😪			\bigtriangledown	Detail 2	\odot	Detail 3	\odot	Detail 4	$\overline{\mathbf{v}}$	Detail 5	$\overline{\bigcirc}$	Туре	\odot
		Item Pairing													
	-	System	1												
	1	Item Pairing System	2												
	1	Item Pairing System	3												
	1	Item Pairing System	4												
	1	Item Pairing System	5												
			_							Page size				20	

Both Traka User 01 and Traka User 02 have been made members of that CIAG.

Edit	?	Custo	mise								
)etails Ite	m Acces	users	History								
0	Sync	Member ⊙	Display Name 📀	Staff Number 🕑	Job Role	\odot	Tel	\odot	Fax 🕑	Mobile	\odot
	O		Super Admin		i		2)				
	۲		Traka Admin								
	۲	1	Traka User 01								
		1	Traka User 02								
<											>
Page 1 of	1 (4 iten	ns) 🔇 🔇	100						Page size:		20

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. Since the Item Allowance within this group is 3, the system asks the user if they want to remove another item from the system.



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3. Traka User 01 selects Yes, and the system 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.

S # 23/05/2022 12:21:40	traka ASSA ABLOY
Please remove item from position 3.	

- 4. After taking the item from Position 3, Traka User 01 logs out.
- 5. 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.

® #	23/05/2022 12:32:58	traka ASSA ABLOY
	Please remove item from position 2.	

All the other functionalities typical of the Advanced FIFO feature will apply as normal.

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:

Edit Pairing -	Edit Pairing - Exclusive User Pairing									
Edit	Customise	Export								
Details Items	History									
	ems for System 'Item Pairi		n be selected from the secondary column							
Primary	Secondary	Position 🔶	Description	\odot						
		1								
		2								
		3								
		4								
		5								
<				>						
Page 1 of 1 (5 iter	ns) 🔇 🔇 <u>1</u> 🔊 🔊		Page size:	20 🔽						
P Create Filter										

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.

Edit	Item Ao	cess Group	o - Mai	in Keys	P	Edit	Item Ac	cess Group	o - Spa	are Key	
Edit ails Ite	m Access	Customise Users Histo	ry	Export		Edit Edit Etails	n Access	Customise Users Histo	ry	Export	
	owing items fo	r system 'Item P	airing Syst	cem'.		Only sho	wing items fo	r system 'Item Pa	airing Syst	tem'.	
\odot	Access 😔				\odot	\odot	Access 🛇			Detail 1	
						0					
	1	Item Pairing System	1		<u> </u>	•	1	Item Pairing	2		
	1		1		11		4	System Item Pairing	2	-	
1	1	System Item Pairing			11		↓ ↓ (2 items)	System Item Pairing System	4		
	1	System Item Pairing System Item Pairing	2					System Item Pairing	4		

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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.

S # 23/05/2022 12:55:47	traka Assa ABLOY
Please select the group(s) of it	ems you wish to be allocated:
Item Group Main Keys	Items Available Sel 2
Spare Keys	2
Select All Deselect All	Cancel

2. Traka User 01 chooses to remove items from both groups, selects them on the screen and clicks on Continue.

♥ ♥ 23/05/2022 12:56:43	traka ASSA ABLOY
Please select the group(s) of it	ems you wish to be allocated:
Item Group Main Keys Spare Keys	Items Available Sel
Select All Continue	Cancel

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.

	traka ASSA ABLOY
Please remove item from position 4.	
	23/05/2022 13:12:52

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.

۲۵۰ کی)22 14:24:03	traka ASSA ABLOY
Please remove item from position 2.	Ple	ease remove item from position 3.	

All the other functionalities typical of the Advanced FIFO will apply as normal.

6.13.10.2 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.

6.13.10.2.1 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:

Edit Pairing -	Edit Pairing - Engine & Electrical Keys									
		Customise	Export							
Details Items	Histo		Export	1						
(i) Only showing it	tems fo	or System 'Item Pairin	a System'							
				em ca	in be selected from the secondary column					
Primary (\bigcirc									
Plinary	\odot					\bigcirc				
	\odot	Secondary	Position	1	Description	\odot				
	\checkmark	Secondary	Position	1 2	Description					
v			Position		Description					
V			Position	2	Description					
× × ×			Position	2 3	Description	 Image: Second sec				
			Position	2 3 4		,				
			Position	2 3 4	Description	 20 				

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.

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.

Edit	Item Ac	cess Grou	o - Ele	ctrical B	oxes	s Keys		.	Edit	Item A	cces	s Grou	p - Er	igine Ke	y
Edit	201	Customise		Export				H P Edit			Cu:	tomise	*	Export	
etails Ite	m Access	Users Histo	гу			_		Details	Item	Access	Users	Hist	ory		
🕕 Only sho	owing items fo	r system 'Item P	airing Syst	em'.				🕕 Oni	ly shov	ving items (for syst	em 'Item I	airing Sy	stem'.	
0	Access 오	System 🔺 😪	Pos. 🔺	Detail 1	\odot	Detail 2		0	\odot	Access 🕑) Sys	tem 🔺 🕑	Pos	Detail 1	Q
	1	Item Pairing System	1							1		n Pairing tem	5		
	1	Item Pairing System	2					Page 1	of 1	(1 items)			>>		
	1	Item Pairing System	3					♥ <u>Crea</u>					-		
	1	Item Pairing System	4												
		Item Pairing System	5												
Page 1 of 1	(5 items)	30100	>												
♥ <u>Create Fi</u>	<u>ter</u>						-								

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.

S ♥ 23/05/2022 15:44:01	traka Assa ABLOY
Please select the group(s) of ite	ems you wish to be allocated:
Item Group	Items Available Sel
Electrical Boxes Keys	2
Engine Key	1
Select All Deselect All	Cancel

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.

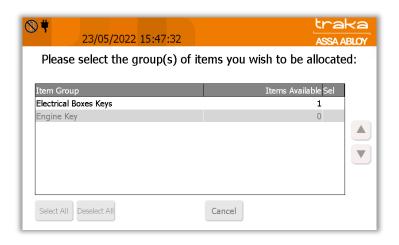
NOTE: Since Traka User 01 removed one of the Primary items, the access to the Secondary item will be automatically blocked to them and any other user.

23/05/2022 15:30:51	traka ASSA ABLOY
Please remove item from position 3.	
	23/05/2022 15:30:51 Please remove item from position 3.

3. Provided that the item allowance for the CIAG permits it, Traka User 01 is asked if they want to remove another item. They select Yes.

S ♥ 23/05/2022 15:46:38	traka ASSA ABLOY
Would you like to take another item?	
Yes No	

4. Traka User 01 is now taken to the CIAG selection screen where they can see that the Engine Key CIAG has become unavailable (is greyed out). This is because not all the Primaries are back in the system and the Engine Key group only contains one item, the Secondary item.



5. Traka User 01 cancels the operation and is automatically logged out.

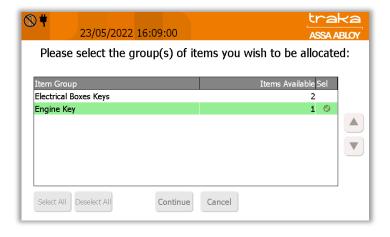
6. When Traka User 02 logs into the system, they are taken to the CIAG selection screen and will also see the Engine Key group unavailable. This is because one of the Primary items is still out of the system. Traka User 02 can only select to remove items from the Electrical Boxes Keys group. If they select that group, the system will release one item from that group in accordance with the First In-First Out principle.

⊗♥ 23/05/2022 16:00:47	traka ASSA ABLOY
Please select the group(s) of ite	ems you wish to be allocated:
Item Group	Items Available Sel
Electrical Boxes Keys Engine Key	2
Select All Deselect All	Cancel

- 7. Traka User 02 does not remove any items and logs out.
- 8. Next, Traka User 01 logs in and returns one of the Primary items they have held.
- 9. Then Traka User 02 logs in again and they are taken to the CIAG selection screen.

® #	23/05/2022 15:44:01	tral Assa A	
Please	select the group(s) of it	ems you wish to be allocate	d:
Item Grou Electrical E		Items Available Sel 2	
Engine Ke	,	1	
Select All	Deselect All	Cancel	

10. 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.



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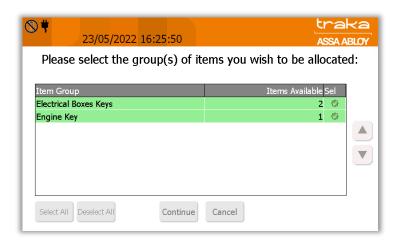
- 11. Since the item in the Engine Key group is the Secondary item, its removal blocks all the Primary items in the system. No user is now allowed to remove them until the Secondary item has been returned. Since the Electrical Boxes Keys CIAG consists only of the Primary items, all of them become automatically unavailable. Traka User 02 is automatically logged out.
- 12. 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.



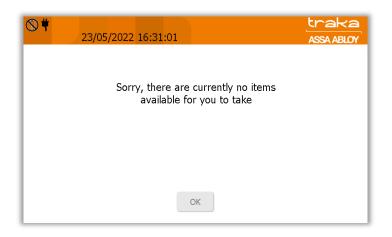
13. Once the Secondary item from the Engine Key CIAG has been returned by Traka User 02, the users regain access to the affected CIAGs.

♥ ♥ 23/05/2022 15:44:01	traka Assa ABLOY
Please select the group(s) of it	ems you wish to be allocated:
Item Group Electrical Boxes Keys Engine Key	Items Available Sel 2 1
Select All Deselect All	Cancel

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.



All the other functionalities typical of the Advanced FIFO will apply as normal.

6.13.11 REMOTE RELEASE WITH ITEM PAIRING

It is not possible to Remote Release to an active user on a position that is subject to either Lockout Pairing or Exclusive User Pairing. However, a Remote Release can be applied to an anonymous user even if the selected position is subject to Item Pairing rules.

6.13.12 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.

6.13.13 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 Toolbar. The menu will expand and reveal the **Item Pairing** sub-menu represented by the chain link icon:



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 Toolbar or double-click on the selected rule to start editing it.

		traka ASSA ABLO
port .		
Rule	System	\odot
Lockout Pairing	Etem Palling System	
		> Page size: 20 🔽
	,	rage size: 20 M
	port Rule	Rule System Lockout Pairing Relations System

You will be redirected to the Edit Item Pairing rule **Details** page.

3. Select the **History** tab.

Edit Pairing - Engi	ine & Electrical Keys	traka Assa Abloy
Details Items History	٦ ٦	
Name: Region: System: Pairing Rule:	Engine & Electrical Keys Default Item Pairing System Lockout Pairing	Rule Types: Lockout Pairing: Access to items is restricted when the associated paired item is out of the system Exclusive User Pairing: The same user cannot access both associated paired items simultaneously

You will then see the recorded history of all the changes to that Item Pairing Rule.

ncel Cu tails Items	istomise	Export			AS
When	Action	Field	Who	Old	New
23/05/2022 15:04:03	Item Added	Primary	Super Admin		Item Pairing System 2
23/05/2022 15:04:03	Item Added	Primary	Super Admin		Item Pairing System 4
23/05/2022 15:04:03	Item Added	Secondary	Super Admin		Item Pairing System 5
23/05/2022 15:04:03	Item Added	Primary	Super Admin		Item Pairing System 1
23/05/2022 15:04:03	Item Added	Primary	Super Admin		Item Pairing System 3
23/05/2022 14:53:15	Modified	Name	Super Admin	Electrical Boxes Keys	Engine & Electrical Keys
23/05/2022 14:52:37	Created	System	Super Admin		Item Pairing System
23/05/2022 14:52:37	Created	Pairing Rule	Super Admin		Lockout Pairing
23/05/2022 14:52:37	Created	Name	Super Admin		Electrical Boxes Keys

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6.13.14ITEM PAIRING IN TRAKAWEB REPORTS

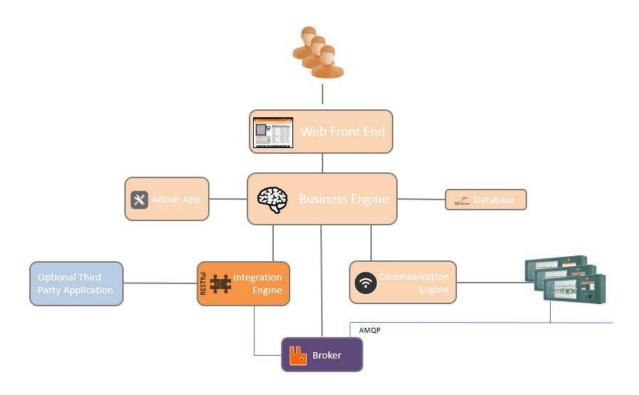
All the events related specifically to the Item Pairing Rules will be visible in the Central History Report. You can also create a Central History Report and specifically choose **Pairing** as the Object for the report. To read more on how to generate such a report, please refer to the <u>Central History Report</u> section in this document.

Central History Report	traka ASSA ABLOY
The Central History Report will only return a maximum of 2500 records. Please select the filter parameters below:	
Step 1: Select Date Range Date From: 25/04/2022 00:00:00 Date To: 25/05/2022 23:59:59 Duration: 31 days	
Step 2: Select Action and Object Action:* Access Added; Access Removed; Added; Added Object:* Pairing	

Central H	listory Repo	ort					trak ASSA AB
Customise	Export						
			Filte	r summary:			
Date From: 25/04/2		Date To: 25/0	572022 25.55	Action: Access Ac Removed, Added, J Deleted, Item Adde Item Removed, Mo From	Added To, Created, ed, Item Modified,	ct: Pairing	
<< Edit Filter Select	ion						
<< Edit Filter Select	Object	Record	Action	Field	Who	Old	New
		Record Exclusive User Pairing	Action Item Added	Field Secondary	Who Super Admin	Old	New Item Pairing System 2
When	Object	Exclusive User				Old	Item Pairing
When 24/05/2022 16:03:51	Object Pairing Items	Exclusive User Pairing Exclusive User	Item Added	Secondary	Super Admin	Old	Item Pairing System 2 Item Pairing
When 24/05/2022 16:03:51 24/05/2022 16:03:51	Object Pairing Items Pairing Items	Exclusive User Pairing Exclusive User Pairing Exclusive User	Item Added Item Added	Secondary Primary	Super Admin Super Admin	Old 	Item Pairing System 2 Item Pairing System 1 Item Pairing
When 24/05/2022 16:03:51 24/05/2022 16:03:51 24/05/2022 16:03:12	Object Pairing Items Pairing Items Rule	Exclusive User Pairing Exclusive User Pairing Exclusive User Pairing Exclusive User	Item Added Item Added Created	Secondary Primary System	Super Admin Super Admin Super Admin	Old 	Item Pairing System 2 Item Pairing System 1 Item Pairing System Exclusive User

6.14 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, 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.**

6.15 SCHEDULED REPORTS

6.15.1 SCHEDULED REPORTS OVERVIEW

The Filtered Reports/Scheduled Reports is a none 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.

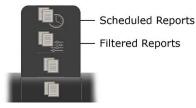
A maximum of 500 reports maybe created, and once configured, the Scheduled Report can be submitted as an email notification in either PDF or Excel format.

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.**

For more information on the setup and configuration of Scheduled Reports, please refer to **TD0013 – TrakaWEB 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 Toolbar 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.

6.16 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.

3. To create a Filtered Report. Select the Filtered Reports icon from the Reports tab on the Navigation Toolbar.



You will now be taken to the Filtered Reports Landing Page.

Filtered Reports								
+ 🦾 🗶 💿 🚺	Customise	Export						
Filtered Report Name	- 📀	Filtered Report Description	📀 Par	ent Report				
		No data to display						
No data to paginate 🛛 🔇	00			Page size: 20				

4. To create a new Filtered Report click **Create** \blacksquare on the Ribbon Toolbar.

Step 1 – Filtered Report Details

3. At the **Filtered Report Details** page, complete the details as shown in the example below. Once completed, click on **Next.**

			ASSA ABL
Step 1 - Filtered	Report Details		
Filtered Report Name:	New Filtered Report		

Step 2 - Report

The next step will require you to select the Parent Report and the Report Timespan.

Step 2 - Rep	ort	
	-Select Report	

4. From the drop down menu, select the required report.

Create New F	ltered Report	tral ASSA AR
Step 2 - Repo	-Select Report-	
Report Timespan:	Current Item Status Report	

5. Next, use the arrow buttons to select a timespan. The default is set to 30 days. The timespan may also be changed from days to hours as required.

_奎 Create New F	iltered Penort	trak
		ASSA ABL
Step 2 - Repo	rt	
Step 2 - Repo	Activity Report	

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. By default, all regions will be selected.

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	Letonica		
C	ustamise Export		
Step 3	3 - Region Access		
All Res	gions		
Select.			- 🛞
2	Default		
2	Region 1		
1	Region 2		
2	Region 3		
Page 1 of	1 (4 Aerra) 🔞 🛛 🖉 🔊 🔊	Page size:	20
T Create F	lter		
		Cancel Back	Nox

Deselecting the **All Regions** check box will enable you to select regions individually.

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-			ASSA ABLO
	H 📲 🙀 🔁 🔁		
Step 3	8 - Region Access		
-			
All Reg			
Select			- 🛇
	Default		
	Region 1		
	Region 2		
	Region 3		
Page 1 of 1	(4 items) 🔘 🕲 🗓 🔘 🔘	Page size:	20 🗾
Treate Fi	ter		
		Cancel Back	c Next

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. By Default, all the available systems will be selected.

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			ASSA ABLO
	stomise Export		
Chan	Contrary Filters		
Step 4	- System Filter		
All Syst			
	Ne .		
Select			- 📀
9	L-Touch First Floar		
9	M-Tsuch Main Office		
2	5-Tauch Reception		
2	V-Touch Ground Floor		
Page 1 of 1	(4 šens) 🚳 🖉 🗓 🔊 🕥	Page size:	20 1
🕈 Create Fil	er		
		Cancel Back	Next
		Gancel Daux	TIGHT

By deselecting the All Systems check box, you can select systems individually.

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a Cre			trak ASSA ABU
	H 11 12 13 13 13		ASSA ADU
.0	ustomise Export		
Step	4 - System Filter		
All Sys			
Seed			• 😒
	1-Touch First Floor		
	M-Touch Main Office		
	5-Touch Reception		
	V-Touch Ground Place		
Page 1 of	1 (4 mams) 🔞 🕲 1 🔊 🕥	Page size:	20 🖬
V Create P	ler.		
		Cancel Back	Next

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. The default setting is for all available items to be selected as shown.

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	istomise		sport	_			
Sten 4	5 - Item	Filte	r				
		Titte			 		
All liter					 		
[e]	V-Touch Ground Ploer	2					
2	V-Louch Ground Plear	5					
10	V-Touch Ground Floer	1					
12	V-Touch Ground Floer	3					
52	V-Touch Ground Hour	4					
Page 1 of 1	(5 Jans) 🕜	OIC	0			Page site:	20
7 Greate Fr	ter						

By deselecting the **All Items** check box, you can select items individually.

Step !	5 - Item	Filte	r									
All iter	11111						_	-	_		_	
Select	System 😪	Pos. Y	Detail 1	2	Detail 2	~	Detail 3	*	Detail 4. 🕑	Detail 5		~
	V-Touch Second Floor	+										
	V-Touch Ground Floor	3										
	V-Touch Sround Hoor	1										
	V Louch Ground Floor	5										
	V Touch Ground Floor	2										

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. By default, all available users will be selected.

	-H- Custor		Export									
	~											
Step	6 -	User Fil	iter									
El MI	lans.											
586												9
2	- 5	iper Admin			_		_			_		
2	T	roka Adrim		4321		Administrator						
100	T	izka Nanagor		1234		Hanager						
8	Ť.	raka User 1		2345		User 1						
2	n	reka User 2		3156		User 2						
1	т	raka Usor 3		4967		Dec 3						
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2000	-											

By unchecking the **All Users** check box, available users may be selected individually.

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9	istornice Ex	port					
Step (5 - User Filter						
C Al Use	rs						
Select							
	Super Admin						
	Traka Admin	4321	Administrator				
1	Traka Manager	1234	Manager				
1	Traka User 1	2345	User t				
0	Traka User 2	3456	User 2				
	Traka User 3	4567	User 3				
Page 1 of 1	((s terns) 🛛 🕄 🕄 🕄	0		Pvu	e size:	20 🔛	
9 Create F	ter						

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.

📚 Create New Filtered Report			trak
			ASSA ABL
Step 7 - Report Sort Order			
Field	Sort Direction	Sort Order	
ActivityRecords			
Description			
Position			
System			
When			
Who			
<			>
Page 1 of 1 (6 terns) 🕜 🔇 🗓 🕥 🕥			Page size: 20
Treate Filter			

<u>Field</u>

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.

👳 Create New Filtered Report		traka
		ASSA ABLO
Step 7 - Report Sort Ord	er	
1 2		
Field		
ActivityRecords	1	
Description	Ascending	
Position	Descending	
System		
When		
Who		
<		2
Page 1 of 1 (6 tems) 🔞 🔇 🚺 🚱 🕥		Page size: 20
Treate Piter		

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 are able to change the number value from between 1 - 6.

Step 7 - Report Sort Ord	er		
Fed	Sart Direction	Sort Order	
Description		•	
Position		2	
System		3	
When		4 5	
Who		6	
¢			,
Page 1 of 1 (6 tems) 💿 🔇 🚺 🕥 🔘			Page size: 20
Treate Filter			
© Create Fiter			

The following examples typically show the Field options based on the available selected Filtered Report options.

Current Item Status Report

Step 7 - Report Sort Or	der		
	Ascending	2	
Position	Ascending	1	
Status	Ascending	6	
System	Ascending	1	
When	Ascending	3	
Who	Descending	6	
<			2
Page 1 of 1 (6 tems) 🛛 🔇 🚺 🚱 🔘			Page size: 20
Treate Filter			

Activity Report

Step 7 - Report Sort Order			
Field			
ActivityRecords	Ascending	6	
Description	Ascending	2	-
Position	Ascending	1	
System	Ascending	4	
When	Ascending	3	
Who	Descending	6	
<			>
Page 1 of 1 (6 terns) 💿 🔇 1 🔊 🕥			Page size: 20 🗾

Overdue Report

Step 7 - Report Sort Orde	r		
	Ascending	2	-
DueBack	Ascending	5	
Position	Ascending	1	
System	Ascending	4	-
TakenBy	Ascending	6	2
WhenTaken	Ascending	6	
¢			>
Page 1 of 1 (6 items) (🕲 👔 🔊 🕥			Page size: 20
🕈 Create Filter			

Curfew Item Status Report

Chan 7 Denast Cast Ord		
Step 7 - Report Sort Ord	er	
Feld	Sort Direction	Sort Order
Description	Ascending	2
DueBack	Ascending	4 3
Position	Ascending	1
Status	Ascending	7
System	Ascending	3
TakenBy	Ascending	5
WhenTaken	Ascending	6
<		>
Page 1 of 1 (7 items) 🕜 🔇 🚺 🕥 💿		Page size: 20 🔤
P Create Filter		

1. Once you have finished editing the Sort Order, click on the **Finish** button.

6.16.1 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 Toolbar, select **View Reports** from the **Reports** menu.



2. At the **Reports** page, select the **Filtered Reports** tab.

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ins						
17						
ics						
n ics Rep	ports	ports	ports	ports	soorts	oorts

3. Next, choose the required Filtered Report and select the required download option.

disation	
agnostics	
New Filtered Report	
New Filtered Report Download the PDF Report Download the XLSX Report	

6.16.2 EDITING A FILTERED REPORT

NOTE: If the Filtered Report is associated to a Scheduled Report, it cannot be deleted.

2. Select the Filtered Report you wish to edit.

Filtered Reports				traka ASSA ABLO
	stomise Export			
Filtered Report Name	• 😔 Filtered Report Description	\odot		\odot
Filtered Report				
New Filtered Report	Activity Report		Activity Report	
Page 1 of 1 (2 items) 🔘 🔇	00			Page size: 20 🔽
Treate Filter				

3. Either double click on the chosen Filtered Report or click on the **Edit** 🦺 button on the Ribbon Toolbar.

This will enable you to navigate through the previous steps and edit any required information.

Edit Filtered Repo	and the second	traka
Edit Filtered Repo		ASSA ABLOY
Edit		
Details Report Options Regi	on Access System Filter Item Filter User Filter Sort Order History	
Filtered Report Name:	New Filtered Report	
Filtered Report Description:	General Activity	

NOTE: A History tab is also available to show an audit of any changes.

6.16.3 DELETING A FILTERED REPORT

1. Select the Filtered Report you wish to delete.

Filtered Repor					ASSA ABL
+ 🦾 🗶 👁 🗊	H T *	Export			
Filtered Report Name		Fittered Report Description	\odot	Parent Report	\odot
Filtered Report					
	1	Activity Report		Activity Report	
New Filtered Report					

4. Next, click on the **Delete** 🔀 button on the Ribbon Toolbar.

A message will then appear requesting confirmation that you wish to delete the Filtered Report.

traka ASSA ABLO
ASSA ABUS

5. Click on delete again to remove the Filtered Report.

The Filtered report will then be removed.

If the Filtered Report is associated with a Scheduled Report, it cannot be deleted and you will receive the following message:

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In this instance, you will be required to delete the associated Scheduled Report first, before the filtered report will be deleted.

6.17 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 the **Scheduled Reports** icon from the Reports tab on the Navigation Toolbar.



You will now be taken to the Scheduled Reports Landing Page.

Scheduled Rep				traka ASSA ABLO
	H T X F Export			
Scheduled Report Name	+ 📀 Filtered Report	Prequency	\odot	Enabled
		No data to display		
No data to paginate 🛛 🔇 🔇	0			Page size: 20
Create Fiter				

2. To create a new Scheduled Report click **Create** \blacksquare on the Ribbon Toolbar.

Step 1 – Scheduled Report Details

 At the Scheduled Report Details page, complete the details as required. 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.

New Scheduled	Report	traka Assa Ablon
Step 1 - Schedu	led Report Details	
Scheduled Report Name:	I	Cancel 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.

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New Sch	eduled Report		traka ASSA ABLOY
	🙀 🛝 🛒 🦻		
Customis	e Export		
Step 2 - 5	cheduled Report Regions		
	1 5		
All Regions:			
Selected			- 😔
2	Defaut		
	Region 1		
2	Region 2		
Ø	Region 3		
Page 1 of 1 (4 item		Page size:	20 🗾
♥ Create Filter			
		Cancel Back	Next

Unchecking the All Regions checkbox will enable you to select individual regions.

New Sch	eduled Report		traka ASSA ABLOY
	Terret		
	cheduled Report Regions		
	cheduled Report Regions		
All Regions:			
Selected			- 🕑
2	Defaut		
	Region 1		
	Region 2		
	Region 2 Region 3		
		Page size:	20
	Region 3	Page size:	20

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.

New Scheduled	i Report			trak ASSA ABI
Step 3 - Sched	uled Report Optic	ons	_	
Filtered Report:	Select Filtered Report			
	PDF			
Report Format:				
Report Format: Report Locale:	English (UK)			

Filtered Report:

Select from a list of existing Filtered Reports

Report Format:

Choose from either PDF or Excel as the submitted report

Report Locale:

Select a language for the report

Send Empty Reports:

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**.

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Step 4 - En	nail Template					
To: Cc:	admin@traka.com					
Boc:						
Subject:	Scheduled Report					
Body:	00 00 00 00 00 00 00 00 00 00 00 00 00	Normal	(Font)	(Font Size)	В І	<u>U</u> S A -

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.

<u>Hourly</u>

New Scheduled Report	traka ASSA ABLO
	ASSA ABLC
Step 5 - Frequency	
Step 5 - frequency	
Hourly Daily Weekly Monthly Yearly	
O Every 1 V Hour(s)	
Start at: 12 🗸 : 00 🗸	
Start at: 12 Y : 00 Y	

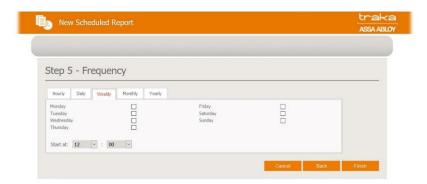
- Select the **Every** option to determine the hourly frequency between 1 and 24 hours.
- Set the start time.

<u>Daily</u>

New Scheduled Report		trak ASSA ABI
Step 5 - Frequency		
Hourly Daily Weekly Monthly Yearly		
O Every 1 Val Day(s)		
O Every 1		
Start at: 12 🗸 : 00 🗸		
Start at: 12 V : 00 V		
	Cancel Back	Finish

- Select the Every option for the frequency of days between 1 and 31 or select Every Week Day
- Select a start time

<u>Weekly</u>



- Select which days of the week the Scheduled Report will be sent
- Select a start time

<u>Monthly</u>

New Scheduled Report			traka ASSA ABLOY
Step 5 - Frequency			
Hourly Daly Weekly Monthly Yearly			
O Day 1 v of every 1 v Month(s) O First v Sunday v of every 1 v Month(s)			
Start at: 12 v : 00 v			
	Cancel	Back	Finish

- 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

<u>Yearly</u>

ASSA ABU
_

- Select Every January-December 1-31 or select First-Fourth Sunday-Saturday of every January-December
- Select a start time
- 1. 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.

Scheduled Rep					ASSA AB
	H T 😹	Export			
New Scheduled Report		New Filtered Report	Every 1 hours, starting at 12	:00 PM	
Page 1 of 1 (1 items) 🕜 🔇	00				Page size: 20

6.17.1 EDITING A SCHEDULED REPORT

1. Select the Scheduled Report that you wish to edit.

Scheduled Reports			ASSA ABL
Edit	Export		
Scheduled Report Name	Filtered Report	Frequency 🛇	Enabled
New Scheduled Report	New Filtered Report	Every 1 hours, starting at 12:00 PM	V
scheduled report	New Filtered Report	At 12:00 PM, on day 1 of the month, only in January	×
Page 1 of 1 (2 terns) 🔇 🔇 1 🔊 👀			Page size: 20

2. Either double click on the chosen report or click the **Edit** 🦺 button on the Ribbon Toolbar.

This will enable you to navigate through the previous steps and edit any required information.

Edit Scheduled F	Report	traka Assa Abloy
HP2		
Details Region Access Rep	ort Options Email Template Frequency History	
Enabled:		
Scheduled Report Name:	New Scheduled Report	

NOTE: A History tab is also available to show an audit of any changes

6.17.2 DELETING A SCHEDULED REPORT

Note: There are no restrictions for deleting a Scheduled Report

1. Select the Scheduled Report that you wish to delete.

Scheduled Report:						ASSA AB
+ L X O II A		Export	1000			
Scheduled Report Name	• 🛞	Filtered Report	\odot	Frequency	\odot	Enabled
scheduled report		New Filtered Report		At 12:00 PM, on day 1 of the January	month, only in	V
Page 1 of 1 (2 items) 🔘 🔇 📋	00					Page size: 20

2. Next, click on the **Delete** 🗱 button on the Ribbon Toolbar.

A message will then appear requesting confirmation that you wish to delete the Filtered Report.

3. Click on delete again to remove the Scheduled Report.

	traka ASSA ABLOY
Details Please confirm you want to delete the scheduled report:	
Scheduled Report Name: New Scheduled Report	
Delete Cancel	

The Scheduled Report will then be removed.

6.17.3 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.

e Reports	
🖨 🗹 Filtered Reports	
- 🔽 Create	
- 🗹 Delete	
Edit	
⊖	
- 📿 Create	
- 🗹 Delete	
Edit	
View Reports	
Software Settings	
Access Schedules	
	 Reports Filtered Reports Create Delete Edit Scheduled Reports Create Delete Edit View Reports Software Settings

6.18 TRAKAWEB FIFO & ADVANCED FIFO

6.18.1 INTRODUCTION

The First In/First Out (FIFO) features were 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 locker 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.

6.18.2 STANDARD FIFO ON TRAKAWEB OVERVIEW

FIFO is a feature that allows the ability to automatically release the item that has been in the locker 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.**

6.18.3 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.**

6.18.4 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.**

6.19 ALLOWANCE ACROSS SYSTEMS (AAS)

6.19.1 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 <u>Common Item Access Group</u> (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.**

6.19.2 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 icon from the Navigation Toolbar.



- 2. At the Item Access Groups page, select the **T** 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.

Name:	AAS Group 1	
Everyone Group:		
Common Group:		A Common Item Access Group allows similar items to be grouped together with a common access right. Items can only be a member of a single Common Item Access Group.
Allowance Across Systems:		
Common Group Type:	First In First Out	O Warning: Items can only be a member of a single FIFO Group.
Region:	Default	
System:	New System	
Allowance:	1	0 = Unlimited

4. Place a tick in the check box for Allowance Across Systems.

Name:	AAS Group 1	
Everyone Group:		
Common Group:		A Common Item Access Group allows similar items to be grouped together with common access right. Items can only be a member of a single Common Item Acces Group.
Allowance Across System	s: 🗹	
Common Group Type:	First In First Out	Warning: Items can only be a member of a single FIFO Group.
Region:	Default	
Allowance:	1	0 = Unlimited

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.

Name:	AAS Group 1	
Everyone Group:		
Common Group:		A Common Item Access Group allows similar items to be grouped together with common access right. Items can only be a member of a single Common Item Acce Group.
Allowance Across Systems:		
Common Group Type:	First In First Out	
Region:	Default	
Allowance:	2	0 = Unlimited

8. Click on the **Systems** tab.

The **Systems** tab will a 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.

Grant All		Revoke All		
Access 😔		System		
×	۲	New System		
~	۲	New System 2		
Page 1 of 1 (2	items)	© © 1 0 D	Page size:	20

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 <u>Multi-Select/Multi-Edit</u> function, you can select all the items at once. In this example, 2 items from each system have been selected.

~									
V									
		New System	3		-				Office Key
	and a second second	All on Page t All On Page t All							Office Key
		ected Item(s) to Selected Item(s		roup					
	Grant A Revoke								
v		New System	1						Gar Key
v									
		New System 2	3						Office Key
		New System 2	4						Office Key
		New System	5						

11. Next, right click within the grid and choose the Add Selected Item(s) to Group.

Select All on Page	
Deselect All On Page	
Deselect All	
Add Selected Item(s) to group	
Remove Selected Item(s) from g	roup
Grant All	
Revoke All	

After confirmation, you will now see a green tick against the selected items indicating that they have now been added to the group.

\odot	Access 🛇	System 🔺 🕑	Pos. 🔺	Detail 1	\odot	Detail 2	\odot	Detail 3	\odot	Detail 4	\odot	Detail 5	Type 💽
	1	New System	1										Car Key
	1	New System	2										Car Key
		New System	3										Office Key
		New System	4										Office Key
		New System	5										
		New System	6										
		New System	7										
		New System	8										
		New System	9										
		New System	10										
	1	New System 2	1										Car Key
	1	New System 2	2										Car Key
		New System 2	3										Office Key
		New System 2	4										Office Key
		New System 2	5										

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.

	\odot		Member 📀	Display Name	Staff Number 🛇	Job Role			Mobile	\odot
	4									
V	2	٠		Traka Admin 1						
	2	٠		Traka Admin 2						
V	2			Traka User 1						
V	2			Traka User 2						
V	2			Traka User 3						
V	4			Traka User 4						
<										;

14. Right click within the grid and select Add Selected Users to Item Access Group.

Select All on Page	
Deselect All On Page	
Deselect All	
Add All Filtered Users to Item Access Grou	p
Remove All Filtered Users from Item Acces	s Group
Add Selected Users to Item Access Group	
Remove Selected Users from 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.

0	$\overline{\mathbb{S}}$		Member 📀	Display Name	Staff Number 🕑	Job Role	\odot	Tel	\odot	Fax	\odot	Mobile	6
		•	1	Super Admin									
		•	1	Traka Admin 1									
		۲	1	Traka Admin 2									
		•	1	Traka User 1									
		•	1	Traka User 2									
		•	1	Traka User 3									
		•	1	Traka User 4									
¢													
Page 1	of 1 ((7 item	s) 🔇 🔇							Page	size:		20

15. 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 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.

	Item Access Groups
-	Ledit Custamise
Sync	Name
۲	AAS Group 1
•	AAS Group 2
<	
Page	1 of 1 (2 items) 🔣 🔇 🧕 🔊 🔊
♥ <u>Crea</u>	ite Filter

6.19.3 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.

6.19.4 TAKING & RETURNING ITEMS - NON-ADMIN USER - (ADVANCED FIFO)

1. Log into system 1 using either keypad, card reader or fingerprint.



System #1



System #2

Once logged in, a list of groups that the user has been allocated access to will be displayed.

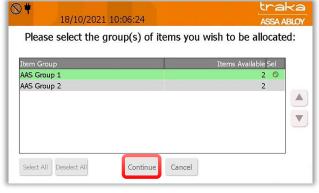




System #2

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, close the door. A message will appear asking if you would like to take another item.



System #1

System #2

Selecting **Yes** will take you through the process of removing the next available item.

Once your allowance for that item type has been reached, the option to remove any more items from that group will appear greyed out on the screen as shown below.



System #1

System #2

NOTE: You will still have the option to select items from other available groups that you have been granted access to.

As the item allowance is applicable across systems, you may log into another system which will grant you with the same permissions.

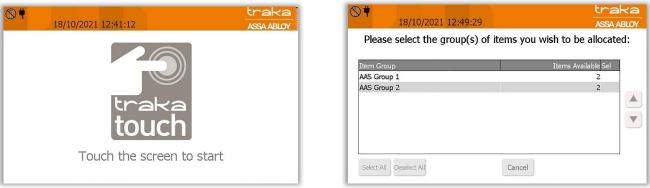


em Group	Items Available Sel
AS Group 1	0
AS Group 2	2

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

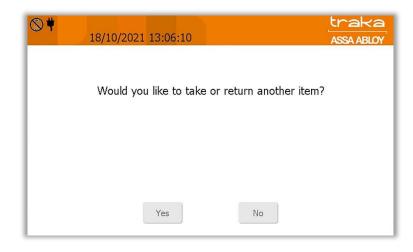
NOTE: A non-admin user cannot log into more than 1 system at a time when Allowance Across Systems has been activated on that system. This does not apply to an admin user.

♥ ♥ 22/10/2021 11:34:22			aka A ABLOY
To access the system, enter your ID.			
You are already logged into another system. Please log out of any other systems and try again			
out of any other systems and ity again	1	2	3
****	4	5	6
	7	8	9
Help New PIN Enrol	\mathbf{X}	0	L

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, close the door and you will see the following message:



Selecting **Yes** will open the door and allow you to take an available item. Selecting **No** will automatically log you out of the system.

Once you have reached your item allowance limit, when you next log into the system, you will only have the option to return items.

® #	18/10/2021 14:22:26	traka ASSA ABLOY
	Please select item(s) to return:	
Pos 1 2 3 4 Select All	Item	Sel

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.



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6.19.5 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.

♥ 18/10/2021 14:39:28	traka Assa ABLOY
Welcome Traka Admin 2, please select an option below:	11 March 19 March 19
Advanced First In First Out	
Reports Admin	Logout

You will then immediately be shown a list of the groups that are available to you.

♥ 18/10/2021 14:56:05	traka Assa ABLOY
Please select the group(s) of	items you wish to be allocated:
Item Group AAS Group 1 AAS Group 2	Items Available Sel 2 2 V
Select All Deselect All	Cancel

You will now be able to perform the same Allowance Across Systems activities as outlined in the previous section.

6.19.6 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.

Sys	stem Access	5										
Car	rd ID:					A	ctive:					
Key	/pad ID:		11	111		S	tart Date:		13/10	/2021 14:37:11	-	
Enr	olment ID:					E	xpiry Date:		13/10	/2071 14:37:11		
PIN	1:					P	ermit Expiry D	ate:	14/10	/2051	•	
PIN	Expiry Date:		1	2/11/2021			uthorison Grou		Hana		-	
Fing	l Force Chang gers Enrolled:					А	llowance Acro	ss Systems Ov	erride: 🔽			
Fing	Force Change		Super Super	System 📀	User Admin 📀	Items 📀	Ilowance Acro System Reports 🕑	SS Systems Ov FIFO Override 🕑	CIAG Allowance Override	Allowance	\odot	Auti
Fing	I Force Chang gers Enrolled:	No. of	Super	System 📿	User Admin 📀	lterns 🔾	System 😱	FIF0	CIAG Alowance (>	Allowance Unlimited		Auti
	I Force Change gers Enrolled: Active 🕑	No. of Items	Super 😔	System 📀	Admin 🔍	Items 📀	System Reports 📀	FIFO Override 🛇	CIAG Allowance Override		 <	Aut
Fing	I Force Chang gers Enrolled: Active 🕑	No. of Items 0	Super Admin	System 📀 Admin	Admin	Items Admin 🛇	System Reports	FIFO Override 🛇	CIAG Alowance Override	Unlimited		Auti

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.**

ard ID:						Active:					
eypad ID:			1111			Start Date:			3/10/2021 14:37:1	1	
rolment ID:			1111			Expiry Date:			3/10/2071 14:37:1		
N:						Permit Expir	y Date:		/10/2051		
N Expiry Dat	۵,		12/11/2021			Authoriser G	Group:		one		
N Force Cha ngers Enroll	nge:			_		Allowance A	cross Systems	Override: 🔽			
N Force Cha	nge:	Super Admin 🕑	System	User Admin 📀	Items Admin 🛇	Allowance A System Reports	FIFO Override 🕑	Override: CIAG Allowance Override		\odot	Auth
N Force Cha ngers Enroll	nge: ed: No. of	Super Admin 🕑	System 📿	User 🕡	Items Admin 🕑	System 🔾		CIAG Allowance		⊘	Auth
N Force Cha ngers Enroll Active	nge: ed: No. of Items		System 📀	User Admin 📀		System Reports 📿	FIFO Overnide 😒	CIAG Allowance Override	Allowance		Auth

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.

♥ ♥ 19/10/2021 09:21:11	traka ASSA ABLOY
Traka Admin 1 Held:	AGAN ABBOT
	10°
	Help
	Lookup

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.

6.19.7 SETTING UP ALLOWANCE ACROSS SYSTEMS - (FIXED RETURN)

A <u>**Common Item Access Group**</u> 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 Toolbar.



- 2. At the Item Access Groups page, select the **T** Create button.
- 3. Next, enter a name for the group and then place a tick in the **Common Group** check box.

Details		
Name: Everyone Group: Common Group:	AAS Group 1	A Common Item Access Group allows similar items to be grouped together with a common access right. Items can only be a member of a single Common Item Access Group.

Selecting this check box will enable you to access the AAS functionality as shown below.

Details		
Name:	AAS FR Group 1	
Everyone Group:		
Common Group:		A Common Item Access Group allows similar items to be grouped together with a common access right. Items can only be a member of a single Common Item Access Group.
Allowance Across System	s;	
Common Group Type:	Fixed Return	Warning: Group Type cannot be changed once assigned.
Region:	Default	
System:	New System	
Allowance:	0	0 = Unlimited

4. Place a tick in the check box for **Allowance Across Systems.**

Details		
Name:	AAS FR Group 1	
Everyone Group:		
Common Group:		A Common Item Access Group allows similar items to be grouped together with a common access right. Items can only be a member of a single Common Item Access Group.
Allowance Across Systems	:	
Common Group Type:	Fixed Return	Warning: Group Type cannot be changed once assigned.
Region:	Default	
Allowance:	0	0 = Unlimited

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.
- 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.

<mark>Details</mark> Systems Item A	Access Users History	
Name:	AAS FR Group 1	
Everyone Group:		
Common Group:		A Common Item Access Group allows similar items to be grouped together with a common access right. Items can only be a member of a single Common Item Access Group.
Allowance Across Systems:		
Common Group Type:	Fixed Return	O Warning: Group Type cannot be changed once assigned.
Region:	Default	
Allowance:	2	0 = Unlimited

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.

tails	Systen	ns It	em Access	Users	History		
Gra	ant All	1	Revoke All	1			
Acces	s 🛇	Sync	System				
1	~	۲	New Syster	n			
1	~		New Syster	n 2			
Page 1	1 of 1 (2	items)		00		Page size:	20 📘
♥ <u>Crea</u>	te Filter						

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 <u>Multi-Select/Multi-Edit</u> function, you can select all the items at once. In this example, 2 items from each system have been selected.

~										
	 New System	3		-					0	ffice Ke
	II on Page t All On Page t All								0	ffice Ke
	Add Selected Item(s) to group Remove Selected Item(s) from group									
	Grant All Revoke All									
~	New System 2	1							G	ar Key
	New System 2	3							0	ffice Ke
	New System 2	4							0	ffice Ke
	New System 2	5								

11. Next, right click within the grid and choose the Add Selected Item(s) to Group.

Select All on Page	
Deselect All On Page	
Deselect All	
Add Selected Item(s) to group	
Remove Selected Item(s) from group	
Grant All	
Revoke All	

After confirmation, you will now see a green tick against the selected items indicating that they have now been added to the group.

					Detail 3			
1	New System	1						Car Key
1	New System	2						Car Key
	New System	3						Office Key
	New System	4						Office Ker
	New System	5						
	New System	6						
	New System	7						
	New System	8						
	New System	9						
	New System	10						
1	New System 2	1						Car Key
1	New System 2	2						Car Key
	New System 2	3						Office Key
	New System 2	4						Office Key
	New System 2	5						

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.

	\odot		Member 😔	Display Name	Staff Number 🕑	Job Role				Mobile	\odot
~											
~				Traka Admin 1							
~				Traka Admin 2							
~											
~				Traka User 2							
~				Traka User 3							
~				Traka User 4							
											:
age 1	of 1	(7 item	ns) 🔿 🕥					Page	size:		20

14. Right click within the grid and select Add Selected Users to Item Access Group.

Select All on Page	
Deselect All On Page	
Deselect All	
Add All Filtered Users to Item Access Gr	oup
Remove All Filtered Users from Item Acc	ess Group
Add Selected Users to Item Access Grou	up
Remove Selected Users from Item Acce	ss Group

After confirmation, you will now see a green tick against the selected users indicating that they have now been added to the group.

0		Member 😔	Display Name	Staff Number 🛇	Job Role	\odot	Tel	\odot	Fax	\odot	Mobile	0
	۲	1	Super Admin							Contraction of Contraction		
		1	Traka Admin 1									
	۲	1	Traka Admin 2									
	۲	1	Traka User 1									
	0	1	Traka User 2									
	0	1	Traka User 3									
		1	Traka User 4									
c												
Page 1 of	1 (7 item	ns) 🔇 🔇	1 > >>						Page	size:		20

15. 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.



6.19.8 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.

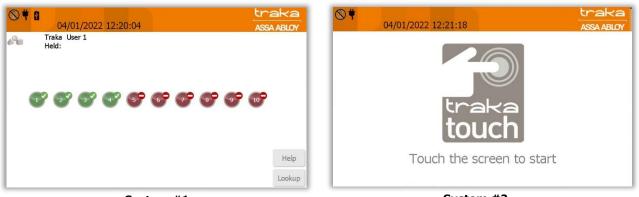
A User is able to take up to the allowance for a group from just one of the systems or across both systems. For example, if group A consists of 2 items on System 1 and 2 items on System 2 then a user with access to the group could take one item from both systems or both items from just one of the systems. 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.

6.19.9 TAKING & RETURNING ITEMS - NON-ADMIN USER - (FIXED RETURN)

1. Log into system 1 using either keypad, card reader or fingerprint.



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

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.



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.

♥ ♥ 22/10/2021 11:34:22			aka A ABLOY
To access the system, enter your ID.			
You are already logged into another system. Please log out of any other systems and try again			
out of any other systems and try again	1	2	3
***	4	5	6
Help New PIN Enrol	7	8	9
		0	L

6.19.10 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.



6.19.11 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.

etails	System A	Access Iten	n Access Gr	Item Acce	ss Region /	Access We	b Access H	listory				
Syst	em Access											
Card	ID:					Active:						
Кеур	ad ID:		1111			Start D	late:		13/10/2021 14:	37:11	-	
Enro	nrolment ID:					Expiry Date: 13/10					3/10/2071 14:37:11 🧧	
PIN:	'IN:					Permit	Expiry Date:		01/12/2051			
PIN P	Expiry Date:		12/11/2	2021		Author	iser Group:		None		-	
PIN F	-orce Change	:		012 <i>0</i> .	_	Allowa	nce Across Sy	stems Override	: 🔽			
Fing	ers Enrolled:											
	Active	No. of Items	Super Admin	System 📀 Admin	User Admin 📀	Items Admin	System Reports	CIAG Allowance Override	Allowance	\odot	Authoriser 🔇	
0				System 🗸 Admin	User Admin 🕑	Items Admin	System Reports		Allowance	 Image: Second sec	Authoriser 🛇	
0	Active 🛇	Items	Admin 🔍		Admin 🔍	Admin 🔍	Reports	Allowance 🛇 Override				
0	Active 📀	Items 0	Admin 🔍	V	Admin	Admin		Allowance (> Override	Unlimited			
0	Active 🕑	Items 0	Admin	V	Admin	Admin		Allowance (> Override	Unlimited System Default			

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.

From 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.

	ails System	Access	em Access Gr	Item Acc	ess Region	Access W	/eb Access	History			
Sy	stem Acces	S									
Ca	ard ID:					Active:					
Ke	eypad ID:		1111			Start	13/10/20	10/2021 14:37:11 🧧			
En	rolment ID:					Expiry	/ Date:		13/10/20	71 14:37:11 📘	
PI	N:					Perm	it Expiry Date:		01/12/20	51 🔽	
PI	N Expiry Date:		12/11/	2021	-	Autho	riser Group:		None		
PI	N Force Chang	le:				Allow	ance Across S	ystems Overri	de: 🔽		
Fir 0	ngers Enrolled	:									
		Active 😔	No. of Items	Super Admin 🛇	System 🕑 Admin	User Admin 📀	Items Admin 🛇	System 🕞 Reports 🛇	CIAG Allowance 🛇 Override		\odot
2	Region 🕑			~	7	7	7	V	V	Unlimited	-
2	Region 🕑 Default	7	0			1	~			System Default	-
2		 Image: Second sec	0	2	~	~	Y	Period .	, passar		
2	Default Default				2			Reind	Parat		

6.20 TRAKAWEB 16BIT SUPPORT

6.20.1 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.

6.20.2 FEATURES

6.20.2.1 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 support
- 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 supported
- 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

6.20.2.2 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 FR & RRSS will be implemented on 16bit via an Admin menu

6.20.2.3 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

6.20.3 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

6.20.4 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 Card ID is not supported
- Secondary PIN Support will remain limited on 16bit compared to Touch. E.g., multiple length PIN, PIN expiry, force PIN change on next login will not be supported on 16bit but only on Touch
- Authorisers are supported to a limited extent. To read more on that, refer to the <u>Enable the use of X-System &</u> <u>X-iFob Authorisation on 16bit Systems</u> section in this document
- New features available on Touch will not be supported on 16bit

6.20.5 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.

System Configuration	System Design	Feature Options	Software Update	
This page allows you select an existing one		olication software o	n your Traka Touch	. Ether upload a new software update file, or
Upload				
	are update file to	upload. Uploaded	files appear in the "	grid below.
	are update file to	upload, Uploaded	files appear in the "	grid below.

3. Navigate to the Firmware file to be uploaded and click on **Open**. The selected file will appear in the grid. Click on **Upload**.

Traka Web	Admin - Adminis	tering localh	ost				×	
						English (l	JK) 🗸	
	System Configuration	System Design	Feature Options	Software Update				
ent 3 - Offline 2 - Offline est - Offline ent	select an existing one	to update to.		n your Traka Touch. files appear in the 'Up	Either upload a new s odate' grid below.	oftware update	file, or	
ent ine on UKOLND-A11438 - Online - UKOLND-A11438 (10	Choose a file from th	ne list below to be	used to update the	e software on the Tra	ka Touch			
line - TRAKA128 (10.239.229.122)	File Name	Comments	File Size	Upload Date	Upload User	Expiration	1	
۵.		C)pen					
🔄 🅣 🔻 🕇 👪 « Releases 🕨	v3.13.xx → v3.13.00(v3.13.xx → v3.13.00(30-Mar-2016)_Build_0001 ~ ♂					016) 🌶	
Organize 🔻 New folder								
G OneDrive	Name		<u>^</u>		Date modifi	ed Typ	pe	
 Davis, Tim This PC Desktop 	TKCbv3.13.00	(30-Mar-2016)_B	uild_0001.mot		30/03/2016	11:17 MC	DT File	
Documents	د					_		
File name: TK	Cbv3.13.00(30-Mar-20	:bv3.13.00(30-Mar-2016)_Build_0001.mot V MOT Fi						
					Open	c	ancel	

Clicking on upload will initiate the sending of the file to the database via the business engine.

- 4. Once the file has been uploaded, it will appear in the list.
- 5. Click on the row and then click on **Update System.**

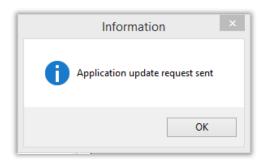


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TrakaWEB will decide whether the new firmware requires a Full Upload after the upgrade process has completed. If you wish to force a Full Upload after the upgrade, see section 5.7 or 5.8.

6. Click the **OK** button to continue.



When the process begins, it can be viewed in the Admin App.

NOTE: The system will be unavailable during the upgrade process. The System View will show that the System is 'Busy'.

New System 1	
Status: 🔾 14/04/2016 09:33:30	
Busy (maintenance)	

The Command List Report will also show progress of the upgrade.

 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.

Command I	.ist Repo	rt							traka ASSA ABLO
Custom			ort Refresh		04/2016 10:50 Si	tart Date		S 12/04/2016 10:50	d Date
System 🕑	Region	\odot	Commands	\odot	Status	Requested Date	•	Completed Date	Expiry Date
New System 1	Default		Application Up	grade	Requested	12/04/2016 09:50:49 +01:00			12/04/2016 09:51:49 +01:00
Name Contains 1	Defende		Annalization 11			12/04/2016 09:44:50			12/04/2016 09:45:50

NOTE: The actual firmware upgrade process is the same as used by Traka32.

6.20.6 ITEM ACCESS

Before any items can be removed from the system, their access must be assigned to a user.

1. In TrakaWEB, select the User icon from the Navigation Toolbar.



- 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.

						No	data to disp	lay						
lo data †	to paginate 🔍	00	»								Page size:			10
Create	Filter													
em Acc Grant	All Revo	ke All												
			Detail 1	\odot	Detail 2	\odot	Detal 3	\odot	Detal 4	\odot	Detai 5	\odot	Туре	6
Grant	All Revo		Detal 1	•	Detal 2	\odot	Detal 3	\odot	Detal 4	\odot	Detal 5	\odot	Type Key	6
Grant Access	Al Revo	Pos. +	Detal 1	0	Detal 2	\odot	Detal 3	0	Detal 4	\odot	Detal 5	\odot		0
Grant Access	All Revo System • 😔 New System	Pos. • 1	Detal 1	۲	Detal 2	\odot	Detal 3	0	Detal 4	•	Detai 5	•	Key	6
Grant Access	All Revo System • 📀 New System New System	Pos. • 1 2	Detail 1	>	Detal 2	 Image: A start of the start of	Detal 3		Detal 4	0	Detal 5	0	Key Key	0
Grant Access	All Revo System • • New System New System New System	Pos. * 1 2 3	Detail 1		Detal 2	 ⊙ 	Detal 3	•	Detal 4	©	Detal 5	۲	Key Key Key	0

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, Swipe Card or Fingerprint.

6.20.7 PERFORMING A FULL UPLOAD FROM THE WEB CLIENT

NOTE: Only a user with appropriate permissions will be able to perform this task.

1. From The Navigation Toolbar, select **Software Permissions Groups**.



2. From the chosen Permissions list, click the check box next to **Full Upload.**

Permissions
🖨 🔳 All Permissions
🖕 🔳 Web
E Features
- 🔽 Full Upload
– 🗹 Read Last ID
🕀 🗹 Remote Release
 Remote User Login
🖨 🔽 Transfer iFob Ownership
- 🔽 To Any User
To Authorised Users
⊕
🖨 🔳 Pages
- 🗹 Alarms

NOTE: For more information on using and assigning Permissions, refer to section 3.6.5 – Software Permissions Groups.

3. To perform a Full Upload on a 16bit system from TrakaWEB Client, select the system in the grid and click the **Full Upload** button.

Systems					traka
Oysterns					ASSA ABLO
	Customise	rt l			
System	Serial Number	IP Address	 Application Version 	Region	\odot
New System					
4					Þ
Page 1 of 1 (1 items)	(() () () () () () () () 			P	age size: 20 🔽
PCreate Filter					

NOTE: This function will only be effective on a 16bit system.

4. At the next confirmation window, click on **Full Upload** to continue.

Full Upload Close	Full Upload Are you sure you	I want to perform a Full Upload to New System?
	Full Upload	Close

5. The command progress window will be displayed once the Full Upload is complete, click on **Close** to continue.



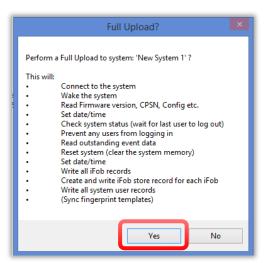
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6.20.8 PERFORMING A FULL UPLOAD FROM THE ADMINISTRATION APPLICATION

1. From within the Admin App, right click on the 16bit system and select the Full Upload option.

😋 Traka Web A	dmin - Administer
File View Tools Help Service setup Service setup Ordau setups Ordau setups Ordau setups Service setup Ordau setups Ordau setups Service setup System management Service on UKOLND-A11438 Ordene - UKOLND-A11438 (10. Subsets Service on UKOLND-A11438 Comme Engine on UKOLND-A11438 Ordene - UKOLND-A11438 (10. Subsets Service on UKOLND-A11438 Service on UKOLND-A11438 Ordene - UKOLND-A11438 (10. Strengt Service on UKOLND-A11438 Service on UKOLND-A11438 Service on UKOLND-A11438 Service on UKOLND-A11438 Strengt Service on UKOLND-A11438 Service on UKOLND-A11438 Service on UKOLND-A11438 Service on UKOLND-A11438 Strengt Service on UKOLND-A11438 Service on UKOLND-A11438 Service on UKOLND-A11438 Service on UKOLND-A11438 Strengt Service on UKOLND-A11438 Service on UKOLND-A11438 Service on UKOLND-A11438 Service on UKOLND-A11438	System Configuration g System Details System Product Family Product Generation Setail Number IP Address MAC Address Time Zone Comms Finite

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 logout 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.

Command Progress	
26/04/2016 09:50:18 Remote Release Requested 26/04/2016 09:50:22 Door Opened 26/04/2016 09:50:37 Benet Release of Position 26/04/2016 09:50:40 Item Removed 26/04/2016 09:50:45 User Logged Out 26/04/2016 09:50:45 User Logged Out 26/04/2016 09:50:49 Remote Release Completed	
	Close .:

6.20.9 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 **System Access** tab within the Edit User page.

	System Acces	Item Acc	ess R	egion Access	Web Ac	cess Hist	ory			
system Acces	SS									
Card ID:				Active:						
Keypad ID:		1111		Start Date	:	02/03/	2017			
Enrolment ID:				Expiry Dat	e:	02/03/	2047			
PIN:				Authoriser	:					
PIN Expiry Date	e:	02/03/2047		Permit Exp	iry Date:	02/03/	2047			
PIN Force Char	nge:									
Fingers Enrolle	d:	0								
	Effective 🔗	System • 🛇	Region 😔	Active 😔	Admin 🛇	Allowance	\odot	No. of Items	Curfew	-
Sync			Default	V	V	System Default		6	None	•
Sync		New System					-			
Sync O		New System	Deradic							,

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.

tails	System Acces	Item Acc	ess Ri	egion Access	Web Acc	ess Histr	ory			
iystem Acce	SS									
Card ID:				Active:						
Keypad ID:		1111		Start Date:		02/03/2	2017			
Enrolment ID:		638807		Expiry Dat	e:	02/03/2	2047			
PIN:				Authoriser						
PIN Expiry Dat	e:	02/03/2047		Permit Exp	iry Date:	02/03/2	2047			
PIN Force Cha	nge:	B								
	d:	0								
Fingers Enrolle										
Angers Enrolle										
ingers Enrolle Sync	Effective 📀	System 🔸 😔	Region 😔	Active 📀	Admin 📀	Allowance		No. of Items	Curfew	
	Effective 👽	System 🔹 🕑 New System	Region 😔 Default	Active 📀	Admin 📀	Allowance System Default	 ✓ 	No. of Items	Curfew None	•
							-			·

3. At the 16bit System, press the **0** button on the keypad. The screen will display the following message:



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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.

6.20.10 SYNCHRONISING AND DOWNLOADING 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.

6.20.11 USING A TRAKAWEB KEYPAD ID/CARD ID WITH OPTIONAL PIN ON 16BIT SYSTEMS

16-bit Cabinets 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 Card ID and a Keypad ID, which can be entered in the user System Access 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.

16bit Firmware with Card Reader Enabled without 'Card and/or PIN' Option

Fields in TrakaWEB

- Keypad ID is not used
- If the 16bit System has a Card Reader configured, TrakaWEB maps the Card ID field 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

- Card ID only: System will accept Card without a Keypad ID
- Card ID & PIN: System will accept Card and prompt for PIN

16bit Firmware with Keypad Only Configuration

NOTE: The 'Card 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 Card ID field 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

16bit Firmware with Card Reader & 'Card and/or PIN' options

WARNING: If switching the 'Card 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 Card and PIN if the keypad ID is not supplied.

Fields in TrakaWEB

- Keypad ID is optionally used for Primary PIN
- Card ID Field is used for Cards
- PIN Field is optionally used for Secondary PIN

Behaviour at Cabinet

- Card ID Only: System will accept Card without a Keypad ID
- Keypad ID Only: System will accept Card without a Keypad ID
- PIN Only: Not Supported
- Card ID and Keypad ID supplied
 - System will accept Card and Keypad ID or
 - System will just accept Keypad ID only
 - Card ID and PIN supplied
 - System will accept Card and PIN

NOTE: The user will not be able to access the system with just their PIN.

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NOTE: This underlying "User requires Card *and* PIN to access Cabinet" flag would be set in this case.

• Card ID and Keypad ID and PIN supplied

NOTE: This is not a valid combination for 16bit and so would behave just like a Card ID and Keypad ID being supplied. I.e., The PIN will be ignored.

6.20.12 16-BIT SYSTEM SUPPORT FOR ALL CARD READERS AND INTERFACES UNDER TRAKA32

As all of the Card-Reader configuration and data is handled solely within the 16-bit 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.

6.20.13 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.

6.20.14 16BIT 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 Section 3.11

6.20.14.1 IFOB 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.

Features	History	
Curfew	Relative 🔹 Hours: 23 🚱 Minutes: 45 📀	
Curfew Type:	relative riburs: 23 💽 Minutes: 45 💟	
Edit		
ls Features	Items Fob Access History	
Curfew		

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.

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6.20.14.2 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.

oorts 💛	Fault Logging 💛 Admin	Allowance	\odot	No. of Items	Item Handover	\bigcirc	Curfew
v	~	System Default	-	2			Relative 🔻 Hours: 6 😔 Minutes: 15 😔
		Unlimited	-	44	None	-	None 🔻
		Unlimited	-	0			Absolute 🔻 Hour: 10 😔 Minute: 45 😔
		Unlimited	-	0			None 🔻
4							
Page 1 o	f 1 (4 items)		>				Page size: 20 💌

For a Traka Touch system, like 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 356 days, 23 hours and 59 minutes. Relative Curfews on a 16-bit system have 23 hours and 45 minutes. Any days will be set to zero at a 16-bit system if a curfew was set on a Traka Touch system for over a day.

6.20.15 REMOTE RELEASE AN ITEM TO AN AUTHORISED OR ANONYMOUS USER

This will use the existing Remote Release Toolbar function on the TrakaWEB System Viewer. For more information, refer to **section 3.2.3.1**

6.20.16 USE 'REMOTE USER LOGIN' TO LOGIN A USER TO A 16BIT SYSTEM

This will use the existing Remote User Login toolbar function on the TrakaWEB System Viewer. For more information, refer to **section 3.2.3.2**

6.20.17 READ THE LAST CARD ID PRESENTED TO A 16BIT SYSTEM WITHIN A USER RECORD

This will use the existing Read Last ID Toolbar function on the Edit User page. For more information, refer to **section 3.3.2**

6.20.18 TRANSFER THE OWNERSHIP OF AN ITEM FROM ONE USER TO ANOTHER

This will use the existing Transfer Ownership Toolbar function from the TrakaWEB System Viewer. Refer to **Section 3.2.3.3**

6.20.19 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

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- 16bit Description Release
- 16bit Key Cabinet Auto Release Multiple Items
- Anti Passback
- CAN Gateway
- Non-RFID Rotation Auto Allocation

6.20.20 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 config 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 Authoriser 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 check the box in the Authoriser column for the 16bit system in your network and then click the Save button.

etails	System	Access	Iter	n Access Gr	Item Acc	ess Region	Access V	Veb Access	History			
Syster	n Access											
										_		
Card II):						Activ					
Keypad	ID:			1234			Start	Date:		23/05/2022	2 10:02:32 🔽	
Enrolm	ent ID:						Expir	y Date:		23/05/2072	2 10:02:32 📘	
PIN:							Perm	nit Expiry Date:		23/05/2052	2 🔽	
PIN Exp	piry Date:			22/06/	2022		Auth	oriser Group:		None	•	
PIN For	rce Change	e:										
Fingers	Enrolled:											
0												
	\sim	No. of		Super 😱	System		Itoms	Svirtam		Auth. 📿	No. of	
) Ac	tive 🛇	Items		Super Admin	System 🕑 Admin	User Admin 🕑	Items Admin	System Reports 🕑	Authoriser 🕑	Auth. Override 🕑	Authorisers	\odot
	~		0	>							2	
	~		0	v	v	v	~	~				
<												>
Page	1 of 1 (2 it	ems) 《	0	100					Page size	e:		20 🔽
P Crea	ate Filter											

NOTE: Authorisers can be nominated on 16bit systems and they will be able to authorise non-authorisers. However, when an Authoriser user logs in, the system will allow them to authorise themselves (the function of "Denying Single Access Authoriser Access" from Traka32 is not supported on 16bit systems connected to TrakaWEB). As a result, the functionality works as follows:

- If the system or iFob authorisation is set to 1, the system will release the iFob automatically
- If the system or iFob authorisation is set to 2, the system will require only one more Authoriser to confirm the iFob removal.

6.20.21 SYSTEM AUTHORISATION

- 1. In TrakaWEB, select the user that will be required to have authorisation to access the 16bit system.
- 2. At the System Access page, select the number of Authorisers that will be required from the drop-down menu and then click the save button.

Details	System	Access	Iter	n Access Gr	Item Acc	ess Region	Access W	eb Access	History			
Syste	m Access											
Card I							Active	:				
Кеура	d ID:			1234			Start	Date:		23/05/2022	2 10:02:32	
Enroln	nent ID:						Expiry	/ Date:		23/05/2072	2 10:02:32 🔽	
PIN:							Permi	it Expiry Date:		23/05/2052	2	
PIN Ex	piry Date:			22/06/	2022		Autho	riser Group:		None	•	
PIN Fo	orce Change	e:										
Finger 0	rs Enrolled:											
						1	1		1			
) A	ctive 🕑	No. of Items		Super 🛇	System 🕑 Admin	User Admin 🕑	Items Admin 🕑	System 🕑 Reports 🕑	Authoriser 💛	Auth. Override 🕑	No. of Authorisers	\odot
	~	Å	0	v					~		2	
	~		0	~	~	~	~	~				
<												>
Page	1 of 1 (2 it	tems) 🔍	0						Page size	:		20 🔽
♥ <u>Cre</u>	eate Filter											

When the user attempts to access the 16bit System using keypad, swipe card or fingerprint, an authorised user will be prompted to identify themselves first, before the system can be accessed.

6.20.21.1 IFOB AUTHORISATION

1. Select the iFobs icon from the Navigation Toolbar.



2. Double click on the iFob that will require the Authorisation permission to be added to it.

Ec		Cu	stomise	Export		Regions) Regio	n	(All Syst		stem
0	Sync	System 🔺 🕑	Pos. 🔺 (Description	\odot	Status	\odot	Who	\odot	When
	0	16-bit System	1			In System				25/05/2022 16:24:08
		16-bit System	2			In System				25/05/2022 16:24:08
		16-bit System	3			In System		Traka User 01		26/05/2022 09:37:25
	۲	16-bit System	4			In System				25/05/2022 16:24:08
	0	16-bit System	5			In System		Traka Admin		26/05/2022 09:37:46
	•	16-bit System	6			In System				25/05/2022 16:24:09
	•	16-bit System	7			In System				25/05/2022 16:24:09
	0	16-bit System	8			In System		Traka User 01		26/05/2022 09:34:52
		16-bit System	9			In System				25/05/2022 16:24:09
	Sur.	16-bit System	10			In System		Traka User 01		26/05/2022 09:37:17
		16-bit System	11			In System				25/05/2022 16:24:09
	۲	16-bit System	12			In System				25/05/2022 16:24:09
	•	16-bit System	13			In System				25/05/2022 16:24:09
	•	16-bit System	14			In System				25/05/2022 16:24:09

3. At the Edit iFob page, navigate to the Features tab and expand the Item Authorisation option.

Edit iFob	traka ASSA ABLOY
Edit	
Details Features Items iFob Access History	
Item Authorisation	
Authorisation required upon removal: None	
Location Logging	
► Curfew	

4. Select the number of Authorisers from the drop-down menu, then click the Save button.

tails	Features Items iFob Acc	ess History
74	Authorization	
	em Authorisation	
A	uthorisation required upon removal	
► Lo	ocation Logging	None
	urfew	1 Authoriser
- u	unew	2 Authorisers

When a user who requires iFob Authorisation attempts to remove the iFob from the system using keypad, swipe card or fingerprint, an Authoriser will be prompted to identify themselves at the system first, before the iFob can be removed.

6.20.22LOCATION 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 section 4.7 – Fuel, Distance & Location Logging.

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 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.

6.20.22.1 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**.

ystem Configuration	System Design	Feature Options	Software Update	
Fault Logging				
System Default	Off			~
Reason Logging				
System Default	Off			~
Notes Logging				
System Default	Off			Ŷ
-Custom Messages -				
System Default	Off			¥
Fuel Logging				
System Default	Off			*
Distance Logging				
System Default	Off			~
Location Logging				
System Default	Off			U
System Default	OT			
9	a On Return			

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 through the **Features** tab.

2. From the System Viewer, select **Edit Item**.



3. At the next window, select the **Features** tab.

H P Ø	Tools		
etails	Features	History	
System			
System Region:		Default	•
Service and the		Default Reception	 ▼
Region:	nly:		•

Within the **Features** tab, you will see a list of all the Feature Options that are available.



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 don't 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.

Location Logging	
Mode:	System Default (On for Return) 🔹
Current Location:	002

6.20.22.2 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.



6.20.22.3 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.

			e Locatio
For	Slot	1 :	ABCØ4

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 Section 4.7.1.6 – Reports, within the Fuel, Distance & Location section of this document.

6.20.23 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 users' items over a period of time as required.

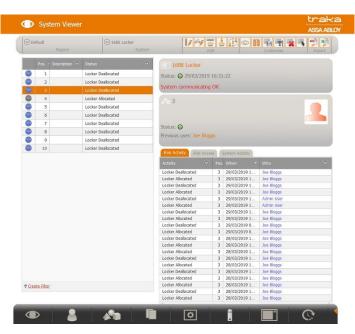
When a user accesses the system, a vacant compartment is made available to the user. Should they choose to, they can select another vacant compartment.

Two different statuses are created for each position in the locker depending on whether that particular compartment is occupied or unoccupied.

For an allocated compartment, the icon within TrakaWEB will be displayed by a grey icon.

For a deallocated 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 users' 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.

6.20.2416 BIT 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.

1. Select the **Business Engine** followed by the **Job Scheduler** tab.

<u>File View Tools H</u> elp								English (UK)
Database setup		Details	Email Configuration	PIN Notification	Enrollment ID Notifica	ation Item I	Booking Options	Job Schedul
Default settings		Jobs						
System management		Jo	ob Name		Enab	led Result	Last Run	
		Pu) ок	29/03/201	8 08:33
	UKOLND-A11562 - Online - UKOLND-A11562 (1							
							1	Edit

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.

File View Tools Help				English (UK)
Database setup Default settings	Details Email Configuration 2 PIN Notification 2 Enrolme	ent ID Notification	Item Booking Options	Job Schedul
B & Users setup	Jobs			
System management Default	Job Name		Result Last Run	E.
Ergine management Business Engine on UKOLND-A11562 - Online - UKOLND-A11562 (1	Purge Historic Data	✓ 01	K 29/03/20	18 08:33
	Settings Job Name Purge Hatoric Data Properties			<u>E</u> dit nabled
	Deleted Users			~
	Number of days worth of logically deleted users to reta	ain (based upon dele	eted date) 365	
	Purge logically deleted users and associated data?		False	
	Events			^
	Number of days worth of events to retain Purge event data?		365 False	
	rage event datar		Tuise.	
	Interval			
	Hourly Daily Weekly Monthly Yearly			
	Every 2 day(s) Every Week Day			
	Start at 02:00			
<		1	Cancel	Save

3. Within the Properties box, change the setting to **True** to enable the parameter.

- B Database setup	Details	Email Con	nfiguration		Notification	E	rolment ID	Notification	tem Bo	oking Options	Job Schedu
Default settings Users setup	Jobs								.]		
Users setup System management	Job	b Name						Enabled	Result	Last Run	
⊕		ge Historic	: Data					•	ок	29/03/20	1.
											Edit
	Settin										
			Purge Histori	nc Data						🗸 Er	nabled
		perties									
		Deleted Us		orth of la	gically delete	ad upper t	ia cotain (ha	and unan	dolotod dat	-) 265	~
					s and associ			seu upon	ueleteu uat	True	
	E	Events	-							True	
		Number	r of days we	orth of e	vents to reta	ain				False	
		Purge e	event data?	2						False	
	0	ourly Da	Week Day	day(s)		arly]	

4. The lower box will allow you to change the interval for when you wish the Schedule to be run.

Eile View Iools Help	Details Email Configuration 2 PIN Notification 2 Enrollment ID No		English (UK)
- Default settings		thication Item Book	ang Options 300 Schedu
B-& Users setup	Jobs		
E System management	Job Name E	inabled Result	Last Run
Bergine management Business Engine on UKDLND-A11562 - Online - UKDLND-A11562	Purge Historic Data	✓ ОК	29/03/2018 08:33
			Edit
	Settings		
	Job Name Purge Historic Data		 Enabled
	Properties		
	Deleted Users Number of days worth of logically deleted users to retain (base	d upon deleted date) 365
	Purge logically deleted users and associated data?		False
	Events		^
	Number of days worth of events to retain Purge event data?		365 False
	Purge event data?		raise
	Interval		
	Hourly Daily Weekly Monthly Yearly		_
	Monday 🗌 Friday		
	Tuesday 🗹 Saturday		
	✔ Wednesday 🗌 Sunday		
	Thursday Start at 02:30 🚖		

5. 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 16-bit 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 your 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:

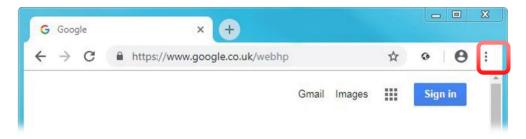
- Google Chrome
- Firefox
- Internet Explorer
- Safari

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

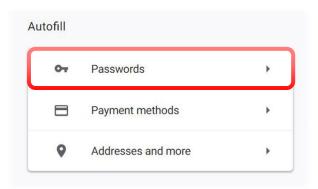
5. Click on the Chrome menu icon.



6. From the menu, select Settings.

	☆	0	θ (
New tab			Ctrl+T
New windo	w		Ctrl+N
New incog	nito windo	w Ctrl+S	hift+N
History			
Download	5		Ctrl+J
Bookmarks	5		
Zoom	- 10	• 00%	53
Print			Ctrl+P
Cast			
Find			Ctrl+F
More tools			
Edit	Cut	Сору	Paste
Settings			
Help			
Exit			

7. At the next screen locate the **Autofill** section and select the **Passwords** option.

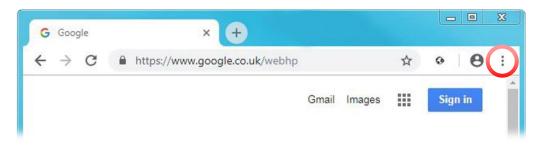


8. The next window will allow you to disable the **Auto Sign-in** option and also enable you to remove any existing saved passwords.

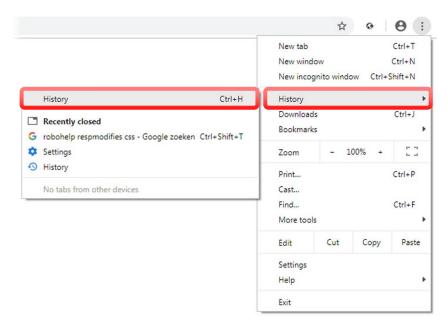
← Passwords	Q Search	h passwords	_	← Passwords ⑦ Q S	earch passwords
Offer to save passwords			-	Offer to save passwords	
Auto Sign-in Automatically sign in to websites using stored credentia confirmation every time before signing in to a website. View and manage saved passwords in your Google Acce		pr	•	Auto Sign-in Automatically sign in to websites using stored credentials. If disabled, you will be ask confirmation every time before signing in to a website.	ed for
Saved Passwords			-	View and manage saved passwords in your Google Account	
Website Username	Password			Saved Passwords	
🥝 localhost		ø	1	Saved passwords will appear here	
🥥 localhost superadmin		0			
Never Saved				Never Saved	
🥝 localhost			×	🥝 localhost	>

9.2.2 CLEARING AUTOFILL DATA

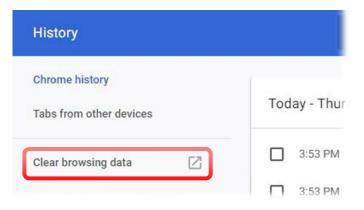
4. Click on the Chrome menu icon.



5. From the menu select the **History** option to expand the properties window and then select **History** from the list.



6. At the next window select the Clear Browsing Data option.



7. A new window will now appear. Select the **Advanced** tab, ensuring that the option for **Autofill Form Data** check-box is selected and then click on **Clear Data.** The browsing data will now be cleared.

	Clea	r browsing data		
		Basic	Advanced	
1	✓	From 5 sites		•
0		Cached images and files Less than 26.5 MB		r
		Passwords and other sign-in data None		
а		Autofill form data None		
0		Content settings 1 site		
		Hosted app data 5 apps (Cloud Print, Gmail, and 3 mo	re)	
P		Media licenses You may lose access to protected co	ontent from some sites.	*
P		s and more	Cancel	Clear data

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

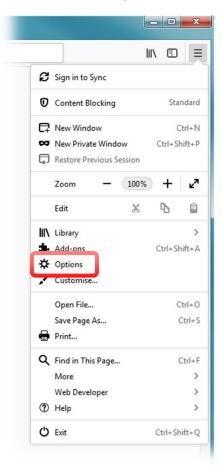
When using Firefox, it is recommended that you disable autofill data and clear the browsing data.

9.3.1 DISABLING AUTOFILL DATA

3. Click on the Firefox menu icon.

🍯 New Ta	ab	× +				
-) → C'	ŵ (C Search with Google or enter address	Q Search		111	
					1	⇔
(🔓 Search the	Web		\rightarrow		

2. From the menu, select **Options.**



3. At the next screen under the **General** section, select **Privacy & Security.**

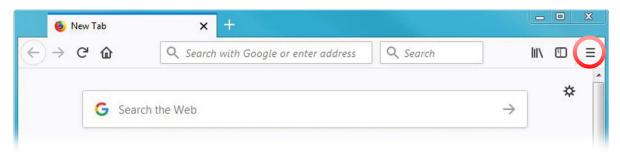


4. Scroll down to the Logins & Passwords section and uncheck the Ask to save logins and passwords for web sites check box.

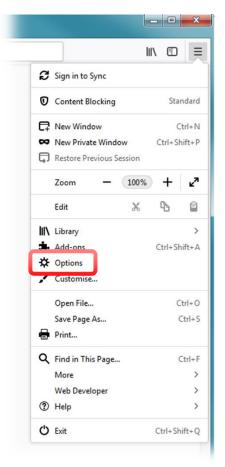
Logins & Passwords	
Ask to save logins and passwo <u>r</u> ds for web sites	Exceptions
	Saved <u>L</u> ogins
Use a master password	Change Master Password

9.3.2 CLEARING AUTOFILL DATA

1. Click on the Firefox menu icon.



2. From the menu, select **Options.**



3. At the next screen under the General section, 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. Click on the **Remove All** button.

	Saved Logins		
₽ Search			
Logins for the following sites are st	ored on your computer		
Site	User name	Last 0	hanged
ttp://iocalhost	superadmin	06/07/.	2016
Remove Remove All		Import	Show Password
Terriere Da			

6. A message will appear asking you to confirm the removal process. Click on Yes to continue.

Ø Search	
ogins for the following	g sites are stored on your computer
Site	Remove all passwords
http://localhost	Are you sure you wish to remove all passwords? Ves No

All passwords will then be removed from your browser and you may then close the window.

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9.4 INTERNET EXPLORER

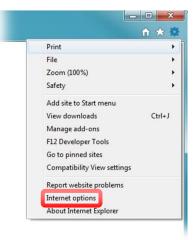
When using Internet Explorer, it is recommended that you disable autofill data and clear the browsing data.

9.4.1 DISABLING AUTOFILL DATA

1. In the Internet Explorer browser, click on the Tools menu icon.



2. From the drop-down menu, select Internet Options.



3. A new window will now appear, select the **Content** tab from the top row.

General	Security	Privacy	Content	Connections	Programs	Advanced
	Security	Privac	Content	Connections	Programs	Auvanced
Home p	age					
~	To cre	ate home	page tabs,	type each add	ress on its o	wn line.
-1	http	//sso.kn	assaablov	net/ASSAABLO)VIIK-Intran	et/ A
	ricep	11330 Ap	assuastoyi	110010000000000000000000000000000000000	ron innun	
						-
		1				
		Use ci	urrent	Use default	Use n	ew tab
Startup	o ———					
© S	tart with ta	abs from	the last ses	sion		
05	tart with h	ome page				
Tabs -						
		Non-Section Section	and the second second second	0.50 a 10 a 200		
Char	nge how w	ebpages (are displaye	ed in tabs.	Ta	abs
		ebpages (are displaye	ed in tabs.	Ta	abs
Browsi	ng history					
Browsi	ng history te tempora	ry files, ł		ed in tabs. kies, saved pas		
Browsii Dele form	ng history te tempora informatio	ry files, ł n.	nistory, cool			
Browsii Dele form	ng history te tempora informatio	ry files, ł n.				
Browsii Dele form	ng history te tempora informatio	ry files, ł n.	nistory, cool		swords, and	
Browsii Dele form	ng history te tempora informatio elete brow	ry files, ł n.	nistory, cool	kies, saved pas	swords, and	d web
Browsii Dele form	ng history te tempora informatio elete brow	ry files, ł n.	nistory, cool	kies, saved pas	swords, and	d web
Browsii Dele form	ng history te tempora informatio elete brow	ry files, h n. sing histo	nistory, cool	kies, saved pas	iswords, and	d web

4. Within the **AutoComplete** section, click on **Settings.**

General	Security	Privacy	Content	Connections	Programs	Advanced
Certifica		rtificates	for encrypt	ted connections	and identif	ication.
Clear SSL state		Certificates		Publish	Publishers	
AutoCor	AutoC	opages an J.	tores previ Id suggests	ous entries matches	Settin	gs
1	conter	nt from we Internet	Slices prov bisites that Explorer a		Settin	gs

5. If checked, uncheck the **Forms** and **User names and passwords on forms** check boxes and then click on **OK** to close the window.

AutoComplete lists possible matches	
typed or visited before. Use AutoComplete for	from entries you've
Address bar	
Browsing history	
V Favorites	
Feeds	
Use Windows Search for be	etter results
Suggesting URLs	
Forms User names and passwords on	forms
Ask me before saving pass	words
Delete Au	toComplete history

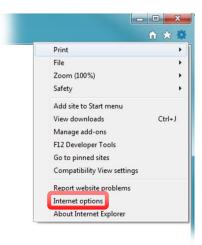
6. Click on **OK** to close the **Internet Options** window.

9.4.2 CLEARING AUTOFILL DATA

1. In the Internet Explorer browser, click on the Tools menu icon.



2. From the drop-down menu, select Internet Options.



3. A new window will now appear, select the **Content** tab from the top row.

		-				4
General	Security	Privacy	Content	Connections	Programs	Advanced
Home	ade					
2	350	ate home	nage tabs	type each add	ress on its	own line
-	5					
	nttp:	//sso-кр.	assaabioy.	net/ASSAABLC	JYOK-Intrar	iet/ 🔺
						-
		r ()			1	
		Use ci	urrent	Use default	Use n	ew tab
Startu	p					
05	tart with ta	abs from t	the last sess	ion		
() S	tart with h	ome page				
Tabs		S. 19 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9				
					0	
	nge how w	ebnages a	are displaye	d in tabs.	Ti	abs
Chai	nge how w	ebpages a	are displaye	d in tabs.	Ti	abs
	nge how w	ebpages a	are displaye	d in tabs.	Т	abs
Browsi	ng history te tempora	ry files, h		d in tabs. ies, saved pas		
Browsi Dele	ng history	ry files, h				
Browsi Dele form	ng history te tempora	ry files, h n.	nistory, cook			
Browsi Dele form	ng history te tempora i informatio	ry files, h n.	nistory, cook	ies, saved pas	sswords, an	d web
Browsi Dele form	ng history te tempora informatio Delete brow	ry files, h n.	nistory, cook		sswords, an	
Browsi Dele form	ng history te tempora informatio Delete brow	ry files, h n.	nistory, cook	ies, saved pas	sswords, an	d web
Browsi Dele form	ng history te tempora informatio Delete brow	ry files, h n. Ising histo	nistory, cook	ies, saved pas	iswords, an	d web
Browsi Dele form	ng history te tempora i informatio Delete brow rance — Colors	n, ry files, h n. Ising histo	nistory, cook ory on exit guages	Delete	sswords, an	d web tings ssibility
Browsi Dele form	ng history te tempora i informatio Delete brow rance — Colors	n, ry files, h n. Ising histo	nistory, cook ory on exit guages	ies, saved pas	sswords, an	d web tings ssibility

4. Within the AutoComplete section, click on Settings.

ernet Options				
General Security Privacy	Content	Connections	Programs	Advar
Certificates Use certificates				54250086M
Clear SSL state	Certificates		Publishers	
AutoComplete AutoComplete son webpages au for you.			Settin	gs
Feeds and Web Slices				
Feeds and Web	ebsites that	t can be	Settin	gs
read in Internet	t Explorer a	nd other		
	t Explorer a	nd other		

5. Click on the **Delete Auto Complete history...** button at the bottom of the window.



6. If checked, uncheck the Form Data and Passwords check boxes and then click the Delete button.

te Brow	sing History		
Prese	rve Favorites web	osite data	
		ry Internet files that en nees and display faster	
Temp	orary Internet file	es and website files	
Copies		es, and media that are	saved for faster
Cooki	es and website da	ita	
	r databases stored o ences or improve we	on your computer by we bsite performance.	ebsites to save
Histor	v		
List of	websites you have v	visited.	
Down	load History		
	files you have downl	loaded.	
Form	data		
Saved	information that you	have typed into form	i.
Passy	ords		
	passwords that are ebsite you've previou	automatically filled in w usly visited.	hen you sign in
		tivex rittering and i	
Protec	tion to detect where	from filtering, data use sites might automatica bitions to Do Not Track	lly be sharing deta
	leting browsing histo	Delete	

- 7. Click **OK** to close the **Auto Complete** window.
- 8. Click **OK** to close the **Internet Options** window.

NOTE: Depending on how often you clear your browsing history, this process can take some time to complete.

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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.



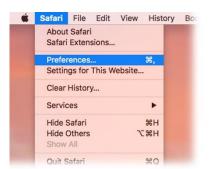
2. A new window will open. Select the **Autofill** tab and if checked, select the **Using information from my contacts** and **Other Forms** check boxes to deselect them.



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.



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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 (x86)\Traka Limited\Traka Business Engine Service\Support

Traka Communication Engine Support Logs:

C:\Program Files (x86)\Traka Limited\Traka Comms Engine Service\Support

TrakaWEB Admin Support Logs:

C:\Program Files (x86)\Traka Limited\Traka Web Admin\Support

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:

From the top of TrakaWEB, select the Info icon O to bring up the information window.

Traka Wel	b	traka ASSA ABLO
Version 3.7.	0 (build 7)	ASSA ABLO
© Traka 20 This progra Unauthorise illegal.	20 m is protected by inter d reproduction or distr	national copyright law. ibution of this product is
Website:	Traka 0333 355 3641 www.traka.com support@traka.com	
Close		
Close		

Technical Support Information

Telephone: 0333 355 3641

International Telephone: +(0)44 333 355 3641

Email: support@traka.com

12. END USER LICENCE AGREEMENT - SOFTWARE

The Software supplied under this End User Licence Agreement (EULA) shall be subject to the following terms and conditions:

1. Definitions

"Applicable Law" means any: (i) law including any statute, statutory instrument, bye-law, order, regulation, directive, treaty, decree, decision (as referred to in Article 288 of the Treaty on the Functioning of the European Union) (including any judgment, order or decision of any court, regulator or tribunal); (ii) rule, policy, guidance or recommendation issued by any governmental, statutory or regulatory body; and/or (iii) industry code of conduct or guideline in force from time to time which relates to this EULA and/or the Hardware.

"Commercial Terms" means any legally binding document relating to the sale or supply of the Hardware to the Customer or dealing with the subject matter of this EULA, including under which payment is made for the Hardware by the Customer.

"Company" means ASSA ABLOY Global Solutions UK Ltd trading as Traka and shall include the Company's successors and assigns.

"Customer" means the person, firm or company with whom this EULA is made.

"Data Protection Laws" means all Applicable Laws relating to data protection, the processing of personal data and privacy, including: (i) the Data Protection Act 1998; (ii) (with effect from 25 May 2018) the General Data Protection Regulation (EU) 2016/679; and (iii) the Privacy and Electronic Communications (EC Directive) Regulations 2003 (as may be amended by the proposed Regulation on Privacy and Electronic Communications); and references to "Data Processor", "Data Subjects", "Personal Data", "Process", "Processed", "Processing" "Processor" and "Supervisory Authority" have the meanings set out in, and will be interpreted in accordance with, such Applicable Laws.

"Documentation" means materials such as manuals, user guides or similar materials associated with or related to the Hardware.

"Embedded Software" means all software including firmware on or embedded in the Hardware at the date of manufacture together with any updates or newer versions made available by the Company from time to time.

"Hardware" means the product acquired from the Company or its authorised partner, including all Embedded Software and Documentation.

"Intellectual Property Rights" means all intellectual and industrial property rights of any kind whatsoever including, but not limited to, patents, supplementary protection certificates, registered trademarks, unregistered trademarks, rights in know-how, registered designs, models, unregistered design rights, rights to prevent passing off or unfair competition and copyright (whether in drawings, plans, specifications, designs and computer software or otherwise), database rights, topography rights, any rights in any invention, discovery or process and applications for and rights to apply for any of the foregoing, in each case in the United Kingdom and all other countries in the world and together with all renewals, extensions, continuations, divisions reissues, re-examinations and substitutions.

"Supplier" means the entity from which the Hardware was purchased by the Customer being the Company or one of its authorised partners.

"Warranty Period" means the 12 months following the date of sale by the Company of the Hardware to which the Embedded Software relates.

- 2. Licence
- 2.1 In consideration of the payment of the price for the Hardware to the Company or its authorised partner, the Company hereby grants a perpetual, non-exclusive, non-transferable licence for the use of the Embedded Software solely for use with the Hardware.
- 2.2 By installing and/or operating the Hardware, the Customer agrees to the terms of this EULA.
- 3. Patents, Designs and Copyright

The Embedded Software is licensed, not sold, to the Customer by the Company for use only under the terms of this EULA. The Company and its licensors retain all proprietary interests and rights in and over the Embedded Software and reserve all rights not expressly granted to the Customer under this EULA including all Intellectual Property Rights which shall remain the exclusive property of the Company or its licensors.

- 4. Restrictions
- 4.1 Except as expressly set out in this EULA or as permitted by law, the Customer agrees not to disclose the contents or code of the Embedded Software to any third party. The Customer may take such copies of the Embedded Software as is necessary for the purpose of back-up security and agrees that all copies shall be kept confidential and subject to the terms of this EULA.
- 4.2 Except as expressly set out in this EULA or as permitted by law, the Customer agrees not to lease, rent, sub-license, loan, sell or otherwise redistribute the whole or any part of the Embedded Software. The Customer may, however, rent, lease or sell the Hardware, provided that: (a) any rental, leasing or sale must include the Hardware and all of the Embedded Software, including all its component parts, original media, printed materials and this EULA; (b) the Customer does not retain any copies of the Embedded Software, full or partial, including copies stored on a computer or other storage device; and (c) the party receiving the Hardware reads and agrees to accept the terms and conditions of this EULA.
- 4.3 The Customer agrees not to modify, disassemble, reverse engineer, derive the source code of, decrypt, create derivative works or decompile the whole or any part of the Embedded Software nor attempt to do so save to the extent expressly permitted by law.
- 4.4 The Customer will not attempt to ascertain or list the source programs or source code relating to the Embedded Software.
- 4.5 The Customer will notify the Company as soon as it becomes aware of any unauthorised use of the Embedded Software by any person.

5. Warranty

- 5.1 The Company believes that to the best of its knowledge the Embedded Software has been thoroughly tested for freedom from arithmetic or logical defects in the Embedded Software and that it will function and perform substantially in accordance with the functions described in the Documentation.
- 5.2 If at any time during the Warranty Period, the Customer becomes aware of a breach of the warranty at Clause 5.1, the Customer will:
 - 5.2.1 promptly notify the Supplier of any defect which it believes to exist, such notice to be given prior to the expiry of the Warranty Period, with all details and information which may assist in diagnosing and correcting the defect; and
 - 5.2.2 provide any facilities, information and assistance which the Supplier may reasonably request to aid the diagnosis of the alleged defect and co-operate with the Supplier in these activities.
- 5.3 If the Supplier is unable to ascertain or correct the defect with the Embedded Software as notified by the Customer in accordance with Clause 5.2, the Supplier (if not the Company) shall notify the Company.
- 5.4 The Company reserves the right to charge the Customer at its prevailing rates for any effort expended in tracing apparent defects which prove not to be defects covered under this Clause 5.
- 5.5 In the event of a proven breach of the warranty in Clause 5.1 during the Warranty Period, the Supplier (or Company (as the case may be)) will either:
 - 5.5.1 repair, or at its option replace, the Embedded Software (or the relevant part of it); or
 - 5.5.2 correct the Documentation to reflect the proper performance of the Software where it is determined by the Company (acting reasonably) that the Software is functioning correctly but is not properly described in the Documentation.
- 5.6 The repair or replacement of the Embedded Software under Clause 5.5 will not be available to the Customer if:
 - 5.6.1 the defect in the Embedded Software is attributable to failure or breakdown or interference of any third party, or software or hardware not supplied subject to this EULA;

- 5.6.2 the Customer is in breach of this EULA;
- 5.6.3 the Customer fails to operate the Hardware properly or fails to follow the instructions or recommendations of the Company as set out in the Documentation with respect to the Embedded Software;
- 5.6.4 the Customer interferes with, modifies, or fails to secure the Embedded Software otherwise than in accordance with the terms of this EULA;
- 6. Training

Other than the supply of the Documentation included with the Embedded Software, no training is provided by the Company unless otherwise agreed by the Customer and the Company.

- 7. Limit of Liability
- 7.1 Subject to Clause 7.2 and 7.3, the Company's maximum aggregate liability in connection with this EULA or the use of the Embedded Software will be limited to the lower of:
 - 7.1.1 any applicable limitation of liability set out in the Commercial Terms; or
 - 7.1.2 £100,000 or 100% of the price paid for the Hardware, whichever is lower.
- 7.2 Subject to Clause 7.3, the Company accepts no liability for any:
 - 7.2.1 loss of business, loss of revenue, loss of profits, loss of goodwill, loss of use, loss of data or loss of any economic liability; or
 - 7.2.2 indirect or consequential losses, however caused, arising in connection with this EULA or the use of the Embedded Software.
- 7.3 The Company makes no attempt to exclude liability relating to or arising from death or personal injury caused by the Company's negligence or the negligence of any employee, agent or contractor of the Company or liability for fraud or fraudulent misrepresentation, or for any other liability for which it would be unlawful to exclude or limit liability.
- 8. Disposal

The Customer undertakes that, upon the cessation of the use of the Hardware for whatever cause, or upon termination of this EULA, it will promptly destroy all known copies of the Embedded Software on any media other than the copy embedded in the Hardware and, if required by the Company, certify that this has been done.

9. Force Majeure

Neither party shall be liable for failure to perform its obligations under this EULA if such failure results from circumstance beyond the party's control.

10. Termination

Either party shall have the right to terminate this EULA if the other party is in material or persistent breach of this EULA and fails to rectify such breach within 30 days of receipt of notification thereof in writing, from the injured party, or if a right to terminate the relevant Commercial Terms has arisen. Termination shall not affect any other rights of the injured party.

11. Consequences of Termination

Upon termination of this EULA all rights and licences granted to the Customer under this EULA will cease immediately.

- 12. Communications and Notices
- 12.1 All communications or notices that the Customer is required to provide to the Company under this EULA shall be sent to the following address:

Traka – ASSA ABLOY 30 Stilebrook Road, Olney, Milton Keynes, MK46 5EA, United Kingdom

or such other address of which the Company makes the Customer aware from time to time.

- 12.2 Any notice given in accordance with Clause 12.1 will be deemed to have been served:
 - 12.2.1 if delivered to or left at the Company's address, at the time the notice is delivered to or left; or
 - 12.2.2 if delivered by pre-paid first class post or mail delivery service providing proof of delivery, at 9:00am on the second Business Day after the date of posting.

13. Assignment

Except as expressly set out in this EULA or as permitted by law, the Customer will not be permitted to assign, transfer, charge, hold on trust for any person or deal in any other manner with any of its rights under this EULA without the prior written consent of the Company.

14. Waiver

A delay in exercising or failure to exercise a right or remedy under or in connection with this EULA will not constitute a waiver of, or prevent or restrict future exercise of, that or any other right or remedy, nor will the single or partial exercise of a right or remedy prevent or restrict the further exercise of that or any other right or remedy.

15. Severance

If any term of this EULA is found by any court or body or authority of competent jurisdiction to be illegal, unlawful, void or unenforceable, such term will be deemed to be severed from this EULA and this will not affect the remainder of this EULA which will continue in full force and effect.

16. Rights of Third Parties

The parties do not intend that any term of this EULA will be enforceable under the Contracts (Rights of Third Parties) Act 1999 by any person.

- 17. Law
- 17.1 This EULA (and any non-contractual obligations arising out of or in connection with it) is governed by the laws of England and Wales and the parties submit to the jurisdiction of the Courts of England and Wales.

Data Protection Laws

- 17.2 The Customer acknowledges that for the purposes of the Data Protection Laws, to the extent any Personal Data is involved in its use of the Hardware and Embedded Software, the Customer will be the Data Controller in respect of such Personal Data.
- 17.3 In limited circumstances, the Company may have access to data stored on the Hardware which may include user names or other Personal Data relating to the Customer's employees or authorized users ("Agreement Personal Data") where such access is required in order to provide support under the Warranty or any hardware maintenance agreement entered into by the Customer and the Company. The Customer authorises the Company to Process Agreement Personal Data during the term of this EULA as a Data Processor for the purposes of performing its obligations under this EULA only.
- 17.4 The Customer authorises the Company to appoint sub-processors of Agreement Personal Data and agrees to the use of the Company's existing sub-processors of Agreement Personal Data (each an "Authorised Sub-Processor").
- 17.5 The Customer shall:
 - 17.5.1 comply with the Data Protection Laws;
 - 17.5.2 ensure that only the Personal Data that the Company requires in order to perform its obligations under this EULA will be disclosed to, shared with and/or accessible by the Company; and

- 17.5.3 obtain all necessary consents and/or provide all fair processing notices required under the Data Protection Laws to enable the Company to lawfully receive, store, disclose and/or use all Agreement Personal Data (whether by itself or Authorised Sub-Processors) for the purpose of performing its obligations and exercising its rights under this EULA and as otherwise agreed by the parties from time to time.
- 17.6 The Company:
 - 17.6.1 may appoint Authorised Sub-Processors in connection with the performance of its obligation under this EULA; and
 - 17.6.2 shall provide notification of changes to Authorised Sub-Processors of Agreement Personal Data to the Customer at least 14 calendar days in advance to provide the Customer with the opportunity to object to the change. The Customer shall be deemed to accept the change if an objection is not received within 10 calendar days of notification. If an objection is received then the parties will work together in good faith to achieve an agreed outcome and any Authorised Sub-Processors appointed shall be appointed on terms the same as this EULA and the Company shall remain liable for the acts and omissions of such Authorised Sub-Processors.
- 17.7 The Company warrants that, if acting as a Data Processor, it shall:
 - 17.7.1 Process the Agreement Personal Data only for the purpose of performing its obligations under this EULA and on such documented instructions received from the Customer from time to time as are reasonable, necessary and relevant to enable each party to perform its obligations under this EULA, save where required by Applicable Law and in such case the Company shall notify the Customer of the nature and extent of the Applicable Laws preventing such Processing (unless to do so would itself be a contravention of any Applicable Law); and
 - 17.7.2 put in place appropriate technical and organisational security measures to the standard required under the Data Protection Law ("Security Measures") and shall provide reasonable assistance with any privacy impact assessment(s) that may be required of the Company under the Data Protection Laws which relate to the Processing of Agreement Personal Data under this Agreement.
- 17.8 From the 25 May 2018, the Company warrants that, if acting as a Data Processor, it shall:
 - 17.8.1 notify the Customer without undue delay after becoming aware of the accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to, Agreement Personal Data transmitted, stored or otherwise Processed ("Data Security Breach"). Where, and in so far as, it is not possible to provide all the relevant information at the same time, the information may be provided in phases without undue further delay;
 - 17.8.2 except to Authorised Sub-Processors, not disclose the Agreement Personal Data to a third party save as required for the performance of its obligations under this EULA, as otherwise provided under this EULA, or as required by Applicable Law;
 - 17.8.3 notify the Customer without undue delay of any notice or communication from the Supervisory Authority which relates directly to the Processing of Agreement Personal Data;
 - 17.8.4 ensure that any individual authorised to Process Agreement Personal Data on behalf of the Customer is subject to appropriate statutory or contractual obligation of confidentiality;
 - 17.8.5 will upon reasonable notice, no more than once in any one calendar year, subject to appropriate confidentiality agreements being entered into, make available to the Customer all reasonable information relating to the Processing of Agreement Personal Data necessary to demonstrate compliance with the obligations set out in this EULA to the extent such information is not already available to the Customer; and allow for and contribute to one audit in any one calendar year, including inspection, conducted by the Customer or another auditor mandated by the Customer to that same extent solely to the extent relevant to the Processing of Agreement Personal Data;
 - 17.8.6 to the extent required by Data Protection Laws, notify and provide reasonable assistance to the Customer on receiving any:
 - 17.8.6.1 complaint by a Data Subject in respect of their Personal Data contained in the Agreement Personal Data or any request received from a Data Subject to have access to his Personal Data (or to exercise any other right(s) afforded to him under the Data Protection Laws) as contained in the Agreement Personal Data (including by appropriate technical and organisational measures, insofar as this is possible);
 - 17.8.6.2 notice or communication from the Supervisory Authority which relates to the processing of Agreement Personal Data;

- 17.8.7 to the extent required by Data Protection Laws, reasonably assist the Customer in:
 - 17.8.7.1 taking measures to address any Data Security Breach; and
 - 17.8.7.2 conducting privacy impact assessments of any Processing operations and consulting with any applicable Supervisory Authority;
- 17.8.8 only share Agreement Personal Data with the Authorised Sub-Processors to carry out the services provided that, to the extent the Authorised Sub-Processor is located outside the UK or the European Union, the Company will implement measures to ensure an adequate level of protection for the rights and freedoms of the relevant individuals in relation to the transfer of any Personal Data, except to the extent that the transfer is (i) to a country that the European Commission has recognised as providing adequate protection for such transfer from time to time and/or (ii) otherwise expressly permitted by Data Protection Laws.
- 17.9 At the option of the Customer, the Company shall securely delete or return to the Customer all Agreement Personal Data promptly following termination of this EULA and shall securely delete any remaining copies.

18. Entire Agreement

- 18.1 Subject to Clause 18.2, the parties agree that these terms and conditions (together with any Commercial Terms) represent the entire agreement between the parties relating to the licence of the Embedded Software, and that no statements or representations made by either party have been relied on by the other in agreeing to enter into the EULA and the parties shall have no remedy in respect of any such statement or representation which is not set out in this EULA.
- 18.2 Unless otherwise specified in the Commercial Terms, if the Customer also enters into a hardware maintenance agreement with the Company then the Customer's rights and obligations under Clause 5.5 and Clauses 17.2-17.9 (inclusive) will apply for the duration of the relevant hardware maintenance agreement by changing only those things which require to be changed in order to retain the meaning of those Clauses.

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All rights reserved.

All brand or product names are trademarks of their respective holders.

NOTE: v3.1 of this EULA, published on 1/Oct/2022 reflects the new legal entity, ASSA ABLOY Global Solutions UK Ltd, and contains no other changes from v3 published in 2018.

13. END USER LICENCE AGREEMENT – EMBEDDED SOFTWARE

The Embedded Software supplied under this End User Licence Agreement (EULA) shall be subject to the following terms and conditions:

1. Definitions

"Applicable Law" means any: (i) law including any statute, statutory instrument, bye-law, order, regulation, directive, treaty, decree, decision (as referred to in Article 288 of the Treaty on the Functioning of the European Union) (including any judgment, order or decision of any court, regulator or tribunal); (ii) rule, policy, guidance or recommendation issued by any governmental, statutory or regulatory body; and/or (iii) industry code of conduct or guideline in force from time to time which relates to this EULA and/or the Hardware.

"Commercial Terms" means any legally binding document relating to the sale or supply of the Hardware to the Customer or dealing with the subject matter of this EULA, including under which payment is made for the Hardware by the Customer.

"Company" means ASSA ABLOY Global Solutions UK Ltd trading as Traka and shall include the Company's successors and assigns.

"Customer" means the person, firm or company with whom this EULA is made.

"Data Protection Laws" means all Applicable Laws relating to data protection, the processing of personal data and privacy, including: (i) the Data Protection Act 1998; (ii) (with effect from 25 May 2018) the General Data Protection Regulation (EU) 2016/679; and (iii) the Privacy and Electronic Communications (EC Directive) Regulations 2003 (as may be amended by the proposed Regulation on Privacy and Electronic Communications); and references to "Data Processor", "Data Subjects", "Personal Data", "Process", "Processed", "Processing" "Processor" and "Supervisory Authority" have the meanings set out in, and will be interpreted in accordance with, such Applicable Laws.

"Documentation" means materials such as manuals, user guides or similar materials associated with or related to the Hardware.

"Embedded Software" means all software including firmware on or embedded in the Hardware at the date of manufacture together with any updates or newer versions made available by the Company from time to time.

"Hardware" means the product acquired from the Company or its authorised partner, including all Embedded Software and Documentation.

"Intellectual Property Rights" means all intellectual and industrial property rights of any kind whatsoever including, but not limited to, patents, supplementary protection certificates, registered trademarks, unregistered trademarks, rights in know-how, registered designs, models, unregistered design rights, rights to prevent passing off or unfair competition and copyright (whether in drawings, plans, specifications, designs and computer software or otherwise), database rights, topography rights, any rights in any invention, discovery or process and applications for and rights to apply for any of the foregoing, in each case in the United Kingdom and all other countries in the world and together with all renewals, extensions, continuations, divisions reissues, re-examinations and substitutions.

"Supplier" means the entity from which the Hardware was purchased by the Customer being the Company or one of its authorised partners.

"Warranty Period" means the 12 months following the date of sale by the Company of the Hardware to which the Embedded Software relates.

- 2. Licence
- 2.1 In consideration of the payment of the price for the Hardware to the Company or its authorised partner, the Company hereby grants a perpetual, non-exclusive, non-transferable licence for the use of the Embedded Software solely for use with the Hardware.
- 2.2 By installing and/or operating the Hardware, the Customer agrees to the terms of this EULA.
- 3. Patents, Designs and Copyright

The Embedded Software is licensed, not sold, to the Customer by the Company for use only under the terms of this EULA. The Company and its licensors retain all proprietary interests and rights in and over the Embedded Software and reserve all rights not expressly granted to the Customer under this EULA including all Intellectual Property Rights which shall remain the exclusive property of the Company or its licensors.

- 4. Restrictions
- 4.1 Except as expressly set out in this EULA or as permitted by law, the Customer agrees not to disclose the contents or code of the Embedded Software to any third party. The Customer may take such copies of the Embedded Software as is necessary for the purpose of back-up security and agrees that all copies shall be kept confidential and subject to the terms of this EULA.
- 4.2 Except as expressly set out in this EULA or as permitted by law, the Customer agrees not to lease, rent, sub-license, loan, sell or otherwise redistribute the whole or any part of the Embedded Software. The Customer may, however, rent, lease or sell the Hardware, provided that: (a) any rental, leasing or sale must include the Hardware and all of the Embedded Software, including all its component parts, original media, printed materials and this EULA; (b) the Customer does not retain any copies of the Embedded Software, full or partial, including copies stored on a computer or other storage device; and (c) the party receiving the Hardware reads and agrees to accept the terms and conditions of this EULA.
- 4.3 The Customer agrees not to modify, disassemble, reverse engineer, derive the source code of, decrypt, create derivative works or decompile the whole or any part of the Embedded Software nor attempt to do so save to the extent expressly permitted by law.
- 4.4 The Customer will not attempt to ascertain or list the source programs or source code relating to the Embedded Software.
- 4.5 The Customer will notify the Company as soon as it becomes aware of any unauthorised use of the Embedded Software by any person.

5. Warranty

- 5.1 The Company believes that to the best of its knowledge the Embedded Software has been thoroughly tested for freedom from arithmetic or logical defects in the Embedded Software and that it will function and perform substantially in accordance with the functions described in the Documentation.
- 5.2 If at any time during the Warranty Period, the Customer becomes aware of a breach of the warranty at Clause 5.1, the Customer will:
 - 5.2.1 promptly notify the Supplier of any defect which it believes to exist, such notice to be given prior to the expiry of the Warranty Period, with all details and information which may assist in diagnosing and correcting the defect; and
 - 5.2.2 provide any facilities, information and assistance which the Supplier may reasonably request to aid the diagnosis of the alleged defect and co-operate with the Supplier in these activities.
- 5.3 If the Supplier is unable to ascertain or correct the defect with the Embedded Software as notified by the Customer in accordance with Clause 5.2, the Supplier (if not the Company) shall notify the Company.
- 5.4 The Company reserves the right to charge the Customer at its prevailing rates for any effort expended in tracing apparent defects which prove not to be defects covered under this Clause 5.
- 5.5 In the event of a proven breach of the warranty in Clause 5.1 during the Warranty Period, the Supplier (or Company (as the case may be)) will either:
 - 5.5.1 repair, or at its option replace, the Embedded Software (or the relevant part of it); or
 - 5.5.2 correct the Documentation to reflect the proper performance of the Software where it is determined by the Company (acting reasonably) that the Software is functioning correctly but is not properly described in the Documentation.
- 5.6 The repair or replacement of the Embedded Software under Clause 5.5 will not be available to the Customer if:
 - 5.6.1 the defect in the Embedded Software is attributable to failure or breakdown or interference of any third party, or software or hardware not supplied subject to this EULA;

- 5.6.2 the Customer is in breach of this EULA;
- 5.6.3 the Customer fails to operate the Hardware properly or fails to follow the instructions or recommendations of the Company as set out in the Documentation with respect to the Embedded Software;
- 5.6.4 the Customer interferes with, modifies, or fails to secure the Embedded Software otherwise than in accordance with the terms of this EULA;
- 6. Training

Other than the supply of the Documentation included with the Embedded Software, no training is provided by the Company unless otherwise agreed by the Customer and the Company.

- 7. Limit of Liability
- 7.1 Subject to Clause 7.2 and 7.3, the Company's maximum aggregate liability in connection with this EULA or the use of the Embedded Software will be limited to the lower of:
 - 7.1.1 any applicable limitation of liability set out in the Commercial Terms; or
 - 7.1.2 £100,000 or 100% of the price paid for the Hardware, whichever is lower.
- 7.2 Subject to Clause 7.3, the Company accepts no liability for any:
 - 7.2.1 loss of business, loss of revenue, loss of profits, loss of goodwill, loss of use, loss of data or loss of any economic liability; or
 - 7.2.2 indirect or consequential losses, however caused, arising in connection with this EULA or the use of the Embedded Software.
- 7.3 The Company makes no attempt to exclude liability relating to or arising from death or personal injury caused by the Company's negligence or the negligence of any employee, agent or contractor of the Company or liability for fraud or fraudulent misrepresentation, or for any other liability for which it would be unlawful to exclude or limit liability.
- 8. Disposal

The Customer undertakes that, upon the cessation of the use of the Hardware for whatever cause, or upon termination of this EULA, it will promptly destroy all known copies of the Embedded Software on any media other than the copy embedded in the Hardware and, if required by the Company, certify that this has been done.

9. Force Majeure

Neither party shall be liable for failure to perform its obligations under this EULA if such failure results from circumstance beyond the party's control.

10. Termination

Either party shall have the right to terminate this EULA if the other party is in material or persistent breach of this EULA and fails to rectify such breach within 30 days of receipt of notification thereof in writing, from the injured party, or if a right to terminate the relevant Commercial Terms has arisen. Termination shall not affect any other rights of the injured party.

11. Consequences of Termination

Upon termination of this EULA all rights and licences granted to the Customer under this EULA will cease immediately.

- 12. Communications and Notices
- 12.1 All communications or notices that the Customer is required to provide to the Company under this EULA shall be sent to the following address:

Traka – ASSA ABLOY 30 Stilebrook Road, Olney, Milton Keynes, MK46 5EA, United Kingdom

or such other address of which the Company makes the Customer aware from time to time.

- 12.2 Any notice given in accordance with Clause 12.1 will be deemed to have been served:
 - 12.2.1 if delivered to or left at the Company's address, at the time the notice is delivered to or left; or
 - 12.2.2 if delivered by pre-paid first class post or mail delivery service providing proof of delivery, at 9:00am on the second Business Day after the date of posting.

13. Assignment

Except as expressly set out in this EULA or as permitted by law, the Customer will not be permitted to assign, transfer, charge, hold on trust for any person or deal in any other manner with any of its rights under this EULA without the prior written consent of the Company.

14. Waiver

A delay in exercising or failure to exercise a right or remedy under or in connection with this EULA will not constitute a waiver of, or prevent or restrict future exercise of, that or any other right or remedy, nor will the single or partial exercise of a right or remedy prevent or restrict the further exercise of that or any other right or remedy.

15. Severance

If any term of this EULA is found by any court or body or authority of competent jurisdiction to be illegal, unlawful, void or unenforceable, such term will be deemed to be severed from this EULA and this will not affect the remainder of this EULA which will continue in full force and effect.

16. Rights of Third Parties

The parties do not intend that any term of this EULA will be enforceable under the Contracts (Rights of Third Parties) Act 1999 by any person.

- 17. Law
- 17.1 This EULA (and any non-contractual obligations arising out of or in connection with it) is governed by the laws of England and Wales and the parties submit to the jurisdiction of the Courts of England and Wales.

Data Protection Laws

- 17.2 The Customer acknowledges that for the purposes of the Data Protection Laws, to the extent any Personal Data is involved in its use of the Hardware and Embedded Software, the Customer will be the Data Controller in respect of such Personal Data.
- 17.3 In limited circumstances, the Company may have access to data stored on the Hardware which may include user names or other Personal Data relating to the Customer's employees or authorized users ("Agreement Personal Data") where such access is required in order to provide support under the Warranty or any hardware maintenance agreement entered into by the Customer and the Company. The Customer authorises the Company to Process Agreement Personal Data during the term of this EULA as a Data Processor for the purposes of performing its obligations under this EULA only.
- 17.4 The Customer authorises the Company to appoint sub-processors of Agreement Personal Data and agrees to the use of the Company's existing sub-processors of Agreement Personal Data (each an "Authorised Sub-Processor").
- 17.5 The Customer shall:
 - 17.5.1 comply with the Data Protection Laws;
 - 17.5.2 ensure that only the Personal Data that the Company requires in order to perform its obligations under this EULA will be disclosed to, shared with and/or accessible by the Company; and

- 17.5.3 obtain all necessary consents and/or provide all fair processing notices required under the Data Protection Laws to enable the Company to lawfully receive, store, disclose and/or use all Agreement Personal Data (whether by itself or Authorised Sub-Processors) for the purpose of performing its obligations and exercising its rights under this EULA and as otherwise agreed by the parties from time to time.
- 17.6 The Company:
 - 17.6.1 may appoint Authorised Sub-Processors in connection with the performance of its obligation under this EULA; and
 - 17.6.2 shall provide notification of changes to Authorised Sub-Processors of Agreement Personal Data to the Customer at least 14 calendar days in advance to provide the Customer with the opportunity to object to the change. The Customer shall be deemed to accept the change if an objection is not received within 10 calendar days of notification. If an objection is received then the parties will work together in good faith to achieve an agreed outcome and any Authorised Sub-Processors appointed shall be appointed on terms the same as this EULA and the Company shall remain liable for the acts and omissions of such Authorised Sub-Processors.
- 17.7 The Company warrants that, if acting as a Data Processor, it shall:
 - 17.7.1 Process the Agreement Personal Data only for the purpose of performing its obligations under this EULA and on such documented instructions received from the Customer from time to time as are reasonable, necessary and relevant to enable each party to perform its obligations under this EULA, save where required by Applicable Law and in such case the Company shall notify the Customer of the nature and extent of the Applicable Laws preventing such Processing (unless to do so would itself be a contravention of any Applicable Law); and
 - 17.7.2 put in place appropriate technical and organisational security measures to the standard required under the Data Protection Law ("Security Measures") and shall provide reasonable assistance with any privacy impact assessment(s) that may be required of the Company under the Data Protection Laws which relate to the Processing of Agreement Personal Data under this Agreement.
- 17.8 From the 25 May 2018, the Company warrants that, if acting as a Data Processor, it shall:
 - 17.8.1 notify the Customer without undue delay after becoming aware of the accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to, Agreement Personal Data transmitted, stored or otherwise Processed ("Data Security Breach"). Where, and in so far as, it is not possible to provide all the relevant information at the same time, the information may be provided in phases without undue further delay;
 - 17.8.2 except to Authorised Sub-Processors, not disclose the Agreement Personal Data to a third party save as required for the performance of its obligations under this EULA, as otherwise provided under this EULA, or as required by Applicable Law;
 - 17.8.3 notify the Customer without undue delay of any notice or communication from the Supervisory Authority which relates directly to the Processing of Agreement Personal Data;
 - 17.8.4 ensure that any individual authorised to Process Agreement Personal Data on behalf of the Customer is subject to appropriate statutory or contractual obligation of confidentiality;
 - 17.8.5 will upon reasonable notice, no more than once in any one calendar year, subject to appropriate confidentiality agreements being entered into, make available to the Customer all reasonable information relating to the Processing of Agreement Personal Data necessary to demonstrate compliance with the obligations set out in this EULA to the extent such information is not already available to the Customer; and allow for and contribute to one audit in any one calendar year, including inspection, conducted by the Customer or another auditor mandated by the Customer to that same extent solely to the extent relevant to the Processing of Agreement Personal Data;
 - 17.8.6 to the extent required by Data Protection Laws, notify and provide reasonable assistance to the Customer on receiving any:
 - 17.8.6.1 complaint by a Data Subject in respect of their Personal Data contained in the Agreement Personal Data or any request received from a Data Subject to have access to his Personal Data (or to exercise any other right(s) afforded to him under the Data Protection Laws) as contained in the Agreement Personal Data (including by appropriate technical and organisational measures, insofar as this is possible);
 - 17.8.6.2 notice or communication from the Supervisory Authority which relates to the processing of Agreement Personal Data;

- 17.8.7 to the extent required by Data Protection Laws, reasonably assist the Customer in:
 - 17.8.7.1 taking measures to address any Data Security Breach; and
 - 17.8.7.2 conducting privacy impact assessments of any Processing operations and consulting with any applicable Supervisory Authority;
- 17.8.8 only share Agreement Personal Data with the Authorised Sub-Processors to carry out the services provided that, to the extent the Authorised Sub-Processor is located outside the UK or the European Union, the Company will implement measures to ensure an adequate level of protection for the rights and freedoms of the relevant individuals in relation to the transfer of any Personal Data, except to the extent that the transfer is (i) to a country that the European Commission has recognised as providing adequate protection for such transfer from time to time and/or (ii) otherwise expressly permitted by Data Protection Laws.
- 17.9 At the option of the Customer, the Company shall securely delete or return to the Customer all Agreement Personal Data promptly following termination of this EULA and shall securely delete any remaining copies.

18. Entire Agreement

- 18.1 Subject to Clause 18.2, the parties agree that these terms and conditions (together with any Commercial Terms) represent the entire agreement between the parties relating to the licence of the Embedded Software, and that no statements or representations made by either party have been relied on by the other in agreeing to enter into the EULA and the parties shall have no remedy in respect of any such statement or representation which is not set out in this EULA.
- 18.2 Unless otherwise specified in the Commercial Terms, if the Customer also enters into a hardware maintenance agreement with the Company then the Customer's rights and obligations under Clause 5.5 and Clauses 17.2-17.9 (inclusive) will apply for the duration of the relevant hardware maintenance agreement by changing only those things which require to be changed in order to retain the meaning of those Clauses.

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NOTE: v3.1 of this EULA, published on 1/Oct/2022 reflects the new legal entity, ASSA ABLOY Global Solutions UK Ltd, and contains no other changes from v3 published in 2018.