PRT-GX-WEB

Protege GX Web Client

End User Guide

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Contents

Introduction

Protege GX is an enterprise level integrated access control, intrusion detection and building automation solution with a feature set that is easy to operate, simple to integrate and effortless to extend. The Protege GX Web Client is a web-based interface for the system, enabling end users to manage, monitor and control their security system without installing any special software.

The web client provides a subset of the features which are available in the Protege GX software, specifically the functions needed by end users such as building managers, HR staff and security guards. Using the web client, you can:

- Manage users who have access to the physical buildings
- Control scheduled door locking/unlocking, area arming/disarming and other functions
- Monitor live events and the status of devices in the system
- Generate reports showing archived events
- Manage operators who have access to the Protege GX web client and software

This guide provides instructions for the functions most commonly performed by end users. Every Protege GX system is unique - ask your installer or system administrator for more details about how to program and operate your system.

The functions you have access to depends on the access which is granted in your operator role, the records which have been programmed in the Protege GX software and the licensed features available in your system. Not all of the features described in this document may be available.

Additional Resources

If the information you're looking for is not in this guide there are a number of additional resources available for learning more about the Protege GX system. All documentation is available on the ICT website: www.ict.co

- The Protege GX Operator Reference Manual is the complete reference for the Protege GX system. It contains information about every option that is available in the Protege GX software and web client.
- The Protege GX End User Guide includes information about operating the system from card readers and keypads.
- The Protege GX Web Client Installation Manual provides instructions to installers for setting up and troubleshooting the web client.

Logging In

Your system administrator or installer will provide you with the URL, username and password for logging in to the web client.

Depending on your installation, the web client may only be available on-premises, or it may be accessible over the internet.

1. Open a web browser such as Chrome, Edge, Firefox or Safari.

   If you are using Safari, ensure that private browsing mode is **disabled**.

2. Browse to the URL for the web client.

3. The first time you log in you may see a security warning. Click **Advanced**, then **Proceed to Website** (these buttons may be slightly different depending on your web browser).

4. Enter the **Username** and **Password** for your Protege GX operator.

   If your installation is set up with Active Directory (Single Sign On) integration, instead of entering a username and password you should enable the **Use Windows Authentication** option.

5. Select your **Language**.

6. Click **LOGIN**.

Home Page

The **Home page** is displayed when you first log in. You can also access this page at any time by clicking the logo in the top left of the screen.

From here you can:

- View **Operator Details** about the operator currently logged in.
- Change the **Current Site** that you wish to view (if you have multiple sites).
- Set the **Display Theme** (light or dark) and the **Display Color** for the operator.
- Click **Logout** to return to the web client login screen.
- Use the **Change Password** button to change your operator password.

The main menu at the top of the screen provides access to all available functions for working in the system.

Managing Users

A **user** is a person that requires access to the facility being controlled by the system. Each user has unique credentials, such as access cards and PIN codes, which they can use to unlock doors and disarm the alarm system.

Access levels are used to control what users can do, where they can go, and when they can do these things.

There are several methods for creating users. This guide describes the steps for adding users from the Users menu. For instructions on using alternative methods, talk to your installer.

Each site will have its own unique requirements for user records, so consult with your installer or system administrator about which options are used in your system.

Adding a User

1. Navigate to **Users | Users**, then click **Add**.

2. Enter a **First Name** and **Last Name** for the user.

3. The system will automatically fill in the **Display Name** in the format 'FirstName LastName' (e.g. John Smith). If your site uses a different format (e.g. Smith, J.), you can adjust the display name.

4. Depending on you site configuration, you may need to select a **Record Group** for the user. This determines which Protege GX operators can view and edit this user record.

5. Enter a **PIN Code**. This is the number the user must enter when logging in to a keypad or accessing a door that requires PIN credentials.

6. Enter the user's credential(s) by typing the relevant facility and card numbers into the available fields.

   Each user can have up to 8 card numbers assigned. Multiple card numbers allow the same user to have multiple credentials (such as cards, fobs, mobile credentials and wireless remotes), without the need to program duplicate user records.

7. Select the **Access Levels** tab to add the required access level(s) to the user. When the user performs an action, the system checks the access level(s) to ensure the user has the relevant permissions to perform the requested action.

   For more information, see Creating an Access Level (next page).

8. Click **Add**, select the relevant access level(s), and click **OK**.

9. In the **Options** tab, there are some common settings you may need to enable:
   - **Treat User PIN +1 As Duress**: The user can activate the silent duress alarm by adding 1 to the last digit of their PIN code.
   - **User Has Super Rights And Can Override Antipassback**: The user can ignore lockdown and antipassback restrictions.
   - **User Operates Extended Door Access Function**: The user unlocks doors for a longer time (for people with mobility issues).

10. Click the **Save** button in the toolbar to save the new user. Now the user can use their assigned credentials and PIN to gain access to doors, and arm and disarm the system from a keypad.

Setting Start and Expiry Dates (Optional)

Each user can be assigned access for a defined period by checking the **Start Date** and/or **Expiry Date** options (in the **General** tab) and setting a date and time.

This allows you to issue and send out cards prior to access being enabled, such as for employees who have not started yet. You can also set credentials to automatically expire, for example when a contractor is due to finish on a set date.

Creating an Access Level

1. Navigate to **Users | Access Levels**, then click **Add**.

2. Enter a **Name** for the access level.

3. Set the **Operating Schedule**. This determines what times the user has access to the doors, areas and other parts of the access level. By default this is set to Always, which grants access at all times. For example, you may wish to limit employee access to only the days when they work.

4. Click **Save**.

Now you can add the parts of the site which the user is permitted to access. The most common requirements are doors, areas and menu groups.

Adding Doors to an Access Level

Doors and door groups define which doors a user has access to, and the schedule that determines when. Most likely your installer has already programmed the doors required for your site.

Door groups are typically used on sites that have a large number of controlled doors. For smaller sites, it is common to use individual doors. Depending on how your installer has set up your system, you may or may not have door groups.

To Add Doors to an Access Level:

1. Select the **Doors** or **Door Groups** tab and click **Add**.

2. Choose the relevant doors or door group and click **OK**.

3. Set the **Schedule** to be applied. By default, the schedule is set to Always, meaning access to the selected doors is permitted at all times. You can assign a schedule to restrict access to the door(s) to the period set in that schedule. For example, you may limit access to an office so it can only be entered during office hours.

4. Save your changes.

Adding Areas to an Access Level

Area groups are assigned to an access level and are used to control the areas that a user can arm and disarm.

To Add an Area Group to an Access Level:

1. Select the **Arming Area Groups** or **Disarming Area Groups** tab and click **Add**.

    Note: If a user is allowed to disarm an area, they are also allowed to arm it.

2. Choose the relevant area group and click **OK**.

3. Set the **Schedule** to be used. By default, the schedule is set to Always, meaning users can arm/disarm areas within that group at all times. You can assign a schedule to restrict arming and disarming to the period set in the schedule. For example, you may not wish an employee to be able to disarm an area outside of their normal working hours.

4. Save your changes.

For information on programming area groups, refer to the Protege GX Operator Reference Manual or ask your installer.

Adding a Menu Group to an Access Level

Menu groups determine what the user can do on a keypad. Typically most users are permitted to arm/disarm areas, but menu functions used for troubleshooting and controlling the system are only available to installers.

1. Select the **Menu Groups** tab and click **Add**.

2. Select the relevant menu group and click **OK**.

    You can only add one menu group to each access level.

3. Save your changes.

Deleting Users

You can easily delete user records that are no longer required.

Simply select the record(s) to be deleted, then click the **Delete** button on the toolbar.

Disabling Users

The **Disable User** setting (found under the **Options** tab) removes access immediately while still retaining the user record and its details. This is ideal for removing access temporarily, such as when staff are away on extended leave, or removing access while still retaining the user information.

Finding User Records

Protege GX sites can have very large numbers of users, so you will often need to filter the user list to quickly locate specific records. The easiest way to do this is with the find tool.

1. Navigate to **Users | Users**.

2. Click the **Find** button in the toolbar.

3. Set the **Field** that you wish to filter by.

    For example, you may wish to find users with specific access levels assigned, or identify all users with mobility restrictions.

4. Enter the information that you wish to find, then click **OK**.

5. The user list will be filtered to display only the records which meet the criteria.

6. To remove the filter and view the full user list, refresh the page.

Configuring Schedules and Holidays

Schedules are defined timeframes that enable a function or access level to operate only within certain specified periods. They can be used to control when a user can gain access, unlock doors automatically, arm or disarm areas at certain times, turn devices on and off or change the way they behave at certain times of day. Schedules are central to automating access control and intrusion detection within the Protege system.

As schedules are commonly used to control access or secure areas it is a common requirement to have the schedule behave differently on a holiday. This is achieved by adding holiday groups which are then used to prevent (or allow) periods within a schedule to function during the holiday duration.

Once a schedule is programmed it will always be either valid or invalid. When it becomes valid, items that are programmed to depend on that schedule become active. For example:

- An access level will only grant access when its **operating schedule** is valid
- A door will unlock when its **unlock schedule** becomes valid
- An output will turn on when its **activation schedule** becomes valid

This section provides some useful programming tips for programming schedules effectively.

Creating Holiday Groups

Before creating a schedule, it is convenient to program one or more holiday groups that apply to it. These should include national, local and other holidays which might cause your site to operate differently - for example, a retail business might have shorter (or longer) hours on a public holiday.

There is no need to program weekends as holiday groups.

1. Navigate to **Scheduling | Holiday Groups** and click **Add**.
2. Enter a **Name** for the holiday group.
3. Select the **Holidays** tab and **Add** holidays to the group.
   - Enable the **Repeat** option for holidays that occur on the same day every year.
   - For holiday periods that span multiple days (such as Christmas Day and Boxing Day), define the start (first day) and end (last day) dates.
   - For holidays that fall on a different day each year (such as Easter), these need to be programmed for each annual occurrence as the dates do not repeat. However, by adding multiple entries you can program many years in advance.
4. Click **Save**. Once you have programmed your holiday group(s), they can be applied to your schedules.

Creating and Editing Schedules

1. Navigate to **Scheduling | Schedules**.
2. Click **Add** and enter a **Name** for the schedule, or select the schedule that you wish to edit.
3. Each schedule has multiple periods that can be programmed, which can be used for different days of the week or holidays. For each period, enter the start and end times that you wish the schedule to operate, and tick the boxes for the required days of the week.
   For more information, see Schedules and Multiple Time Spans (next page).

   Note how the **Graphics View** updates to show when the schedule will be valid.

4. For each period, select the **Holiday Mode** to define how the schedule will operate during a holiday period. Choose from:

- **Disabled on Holiday**: When selected, the period will **not** make the schedule valid on a holiday. In other words, if a door is programmed to unlock by this schedule, it will not unlock on a holiday when this option is selected. This is the default mode of operation for schedules
- **Enabled on Holiday**: When selected, the period will only ever make the schedule valid **on** a holiday. For example, a user might have different access hours on a holiday compared to a normal day.
- **Ignore Holiday**: When selected, the period will make the schedule valid **regardless** of whether the day is a holiday or not. For example, the manager might be able to access the building at all times, holiday or not.

5. Select the **Holiday Groups** tab. Click **Add** and select the holiday groups you wish to apply to the schedule.

   This tells the schedule which days are holidays, but it does not tell the schedule what to do if it is a holiday. This is defined by the **Holiday Mode** above.

6. Click **Save** to finish creating your schedule.

Using a Schedule to Automatically Unlock a Door

Assigning an unlock schedule to a door will determine when that door will unlock. For example, if you have an office entry door that you need to unlock at 8am and lock again at 5pm, you would create a schedule for the opening hours, then assign that schedule to the door.

1. Navigate to **Programming | Doors**.

2. Choose the door you wish to control and set the **Unlock Schedule**.

3. Save your changes.

There are further options for controlling doors with schedules which are only available in the Protege GX software. For further assistance, talk to your installer or system administrator.

Using a Schedule to Control User Access

Schedules are used to control **when** a user can do something. Assigning an operating schedule to an access level determines when the access level is valid and when users can access the options programmed within the access level.

1. Navigate to **Users | Access Levels**.

2. Select the access level you wish to add the schedule to, and set the **Operating Schedule**.

3. Save your changes.

You can also assign a schedule to the doors within an access level to restrict access to the hours defined, and/or to the area groups to restrict arming/disarming to a specific period. This provides more flexibility by allowing you to define access at a more granular level. For example, you may wish to restrict access to one group of doors to scheduled office hours, but permit access to another group outside these hours.

There are many other uses for schedules. For further assistance, we recommend you talk to your installer.

Schedules and Multiple Time Spans

There may be times when schedules need to turn on and off more than once, or at different times on different days. Each schedule has 8 periods to allow for these scenarios.

Below are some examples of when you might use this.

Different Hours for Weekends

Premises may need to open for shorter (or longer) hours on a weekend.

To set this up, simply add a second period with shorter hours and select the relevant day(s).

Different Hours on a Holiday

In some installations, especially retail, a schedule must still operate on a holiday but may do so for shorter or longer hours.

To set this up, simply set up another period with the required days and times, and set the **Holiday mode** to Enabled on holiday.

Multiple Periods in a Single Day

Sometimes multiple periods are required in a single day. Consider a movie theater where there are multiple session times, so the doors must be unlocked during certain periods.

Set as many separate periods for the same day(s) as required.

Overlapping Periods

Where periods overlap, the schedule will take the sum of all periods.

Overnight Schedules

Where a schedule is required to operate overnight, enter a start time, but leave the end time as **12:00 AM**. This results in the period being valid from the start time until midnight.

Now program a second period to start at midnight and continue until the end of the shift. By extending the days that the period is valid, we can create an overnight Monday to Friday shift.

The graphics view is useful for providing a visual representation of when the schedule is valid.

Rules for Schedules and Holidays

If you program times and days into a schedule but don't do anything else, the schedule will **always** operate.

For a holiday to prevent the schedule from becoming valid, the following must have been programmed:

1. The holiday must be programmed in a holiday group.
2. That holiday group must be applied to the schedule in the **Holiday groups** tab.
3. The **Holiday mode** for the schedule period must be set to Disabled on holiday.

Creating Calendar Actions

Calendar actions enable you to override the normal behavior of doors and output devices for a specified duration. They are ideal for situations which aren't covered by existing schedules, such as unlocking doors for special events or turning off the lights when everyone is leaving early.

Calendar actions is a licensed feature, so may not be available in your system. For more information about calendar actions and programming examples, see Application Note 179: Configuring Calendar Actions in Protege GX (available from www.ict.co).

To create a calendar action:

1. Navigate to **Scheduling | Calendar Actions**.

2. Use the calendar view to find the date and time when the event will occur. You can switch between month, week and day views using the toolbar buttons.

3. Click on a day or hour to create a new event.

4. Enter a descriptive **Name**.

5. Set the **Record Group** if required.

6. Select **All Day Event**, or enter a start and end date/time.

7. If the calendar action needs to occur more than once, open the **Recurrence** tab, disable **No Recurrence** and enter the required settings:
   - **Pattern**: Set the days when this calendar action will recur. You can choose from:
     - **Daily**: Can recur every day or defined sequence of days, or every weekday.
     - **Weekly**: Can recur on one or more days of the week, every week or defined sequence of weeks.
     - **Monthly**: Can recur on a specific date or a specific weekday, of every month or defined sequence of months (e.g. the last Sunday of every second month).
     - **Yearly**: Can recur on a specific date or a specific weekday of the month, every year or defined sequence of years (e.g. the last Sunday of August every four years).
   - **Range of Recurrence**: Set the **Start** date for the calendar action, and select how it will end:
     - **No end date**: The calendar action will repeat indefinitely.
     - **End after X occurrences**: The calendar action will repeat a set number of times, and then end.
     - **End by**: The calendar action will repeat until the set date, and then end.

8. If you need to control doors with this calendar action, open the **Doors** tab. Click **Add**, select one or more doors and click **OK**. Then select the action for each door:
   - **Lock**: The door will be locked for the duration.
   - **Unlock Latched**: The door will be unlocked for the duration.
   - **Extended Lock Time**: Whenever the door is unlocked, it will remain unlocked for an extended time. Enter the **Extended Time** (in seconds).

9. If you need to control outputs with this calendar action, open the **Outputs** tab. Click **Add**, select one or more outputs and click **OK**. Then select the action for each output:
   - **On**
   - **Off**

   Outputs represent physical devices in the Protege system, such as lights, HVAC and other utilities. With some additional programming it is also possible to arm and disarm areas using an output - talk to your installer.

10. Click **Save**.

11. Use the calendar view to check whether the calendar action occurs at the correct times and days. You can reopen the calendar action by clicking on it.

Monitoring the System

The web client enables security guards and other staff members to easily monitor what is happening in the system at any time. You can monitor all events or a specific subset of events (such as all events associated with a particular floor of the building).

There are several ways to monitor the system using the web client.

Live Events

The events page (under **Monitoring | Events**) displays a live view of events that are occurring in the system. This includes almost anything that can happen in the system, such as a user accessing a door, a sensor detecting movement, or an operator making changes to a record.

You can customize which events are displayed using the toolbar in the top right:

- **Site**: If your system has multiple sites, select which one you will view.
- **Events Report**: Select which event report will be displayed on this page. There are a few system-created event reports (All Events, All Alarms and All Acknowledged Alarms), and your system may have some custom reports which cover specific parts of the system. For more information, see Event Reports (page 16).
- **Controller**: Controllers are intelligent devices which control the physical security and access system. Your site may have only a few controllers or a large number, depending on the size of the system. You can optionally filter the results based on which controller the events come from.

Status Pages

Status pages are highly customizable monitoring pages which are designed to provide an overview of the system. Your installer or system administrator has likely created one or more status pages to display events and devices that are relevant to different parts of the site.

Navigate to **Monitoring | Status Pages** and select the **Status Page** you wish to view from the dropdown in the top right.

Status pages in the web client can display:

- Live events, filtered by specific event reports.
- The current status of devices such as doors, areas, and sensors. For example, you can see at a glance which areas in the building are currently disarmed and which doors are unlocked.
- Live muster reports, displaying the users who are currently on the premises (licensed feature).

Controlling Doors and Areas

The web client enables you to control certain devices such as doors and areas remotely.

Controlling Doors

Navigate to **Programming | Doors** and locate the door record which you wish to control. Hover the mouse over that record and click the **[+]** button to open the commands window.

The available commands are:

- **Lock**: Locks the door.
- **Unlock**: Temporarily unlocks the door.
- **Unlock Latched**: Unlocks the door until it is locked by another command, schedule or other process.
- **Door Lockdown Commands**: Locks down the door. The door will lock immediately even if it is unlocked by a schedule or other feature. Some lockdown modes allow entry or exit with valid credentials, while others deny access.
- **Clear**: Clears the lockdown.

Controlling Areas

Navigate to **Programming | Areas** and locate the area record which you wish to control. Hover the mouse over that record and click the **[+]** button to open the commands window.

The most commonly used commands are:

- **Disarm**: Disarms the area. The area will not monitor sensors such as motion detectors or door latches, so people are free to enter and use the area.
- **Arm**: Arms the area so that it begins monitoring the sensors and can raise the alarm if an intruder is detected. Remote arming may fail if there is anyone still in the area when you send the command.

There are a number of other options for arming and disarming areas. Check with your installer or system administrator which options are used on your site.

Running Reports

Protege GX provides powerful and flexible reporting options, allowing you to easily retrieve and export specific data from the system.

The report types available for viewing in the web client are:

- User reports
- Event reports (can also be created and edited in the web client)
- Muster reports (licensed feature)
- Attendance reports (licensed feature)

User Reports

User reports contain detailed information about the users in your system. Powerful filtering features enable you to quickly identify important details such as which users have access to selected doors, have triggered defined events, or have cards due to expire.

If your installer or system administrator has created one or more user reports in the Protege GX software you can view them in the web client:

1. Navigate to **Monitoring | User Reports**.

2. Use the **User Report** dropdown to select which user report you wish to run.

3. The web client will load the user report and display details for all of the included user records.

4. You can sort or filter the report to quickly locate the information you need:
   - To sort the report, click on the column heading that you wish to sort (e.g. First Name). Click once to sort from A-Z, then again to sort from Z-A.
   - To filter the report, type in the text field under the column heading. For example, to find users called Alice, type Alice into the First Name column.

5. If you wish you export the report, click one of the buttons in the toolbar:
   - **Print**
   - **Export PDF**
   - **Export CSV**

   The export will only include the rows that are currently visible on screen, so you can sort and filter the report before exporting.

Event Reports

Event reports allow you to view what has happened or is currently happening within the system with ease. By default there are three preconfigured event reports:

- All Events
- All Alarms
- All Acknowledged Alarms

You can also create custom event reports either in the web client or the Protege GX software.

Alarms are special events which can be configured in the Protege GX software. When an alarm occurs, Protege GX software operators receive a popup notification and must acknowledge the alarm to remove the notification. The All Alarms and All Acknowledged Alarms reports can be used to report on active and acknowledged alarms.

Viewing Event Reports

To view an event report in the web client:

1. Navigate to **Monitoring | Event Reports**.
2. Select the **Event Report** from the dropdown.
3. Click **View**.
4. Set the period that the report will cover. You can either select an option from the dropdown (e.g. Last 12 Hours) or set a start and end date for the archived events.
5. Click **OK**. The web client will load the events in the report.
6. You can sort or filter the report to quickly locate the information you need:
   - To sort the report, click on the column heading that you wish to sort (e.g. Field Time). Click once to sort from A-Z, then again to sort from Z-A.
   - To filter the report, type in the text field under the column heading. For example, to find events for a specific user, type that user's name into the **Name** column.
7. If you wish you export the report, click one of the buttons in the toolbar:
   - **Print**
   - **Export PDF**
   - **Export CSV**

   The export will only include the rows that are currently visible on screen, so you can sort and filter the report before exporting.

Creating an Event Report

The web client enables you to create new event reports to further customize which events you can export and monitor.

Not all reporting options are available in the web client. For additional options such as custom report columns, you need to use the Protege GX software.

Before you create an event report you must create an event filter:

1. Navigate to **Monitoring | Event Reports | Event Filters**.
2. Click **Add**.
3. Give the event filter a descriptive name, e.g. All Door Forced Events.
4. In the **Event Types** tab, uncheck the **Include All Event Types** setting.
5. Click **Add** to open the event types window.
6. Locate the event types you need using the keyword search (e.g. search "door" to show all events related to doors). Select one or more event types and click **OK**.
7. Click **Save**.

Now you can create the event report:

1. Navigate to **Monitoring | Event Reports | Report Setup**.
2. Click **Add**.
3. Give the report a descriptive name.
4. Set the maximum **Number Of Events** that will be included in this report.

   If you experience performance issues when retrieving large numbers of events it may be helpful to restrict the number of events in the report and run the report multiple times using different time periods.

5. In the **Filters** tab, click **Add**.

6. Select the **Event Filter** created above.

7. You can either enable the **All Record Groups** checkbox or select one or more record groups which will be used to filter this report.

8. Click **OK**.

9. Click **Save**.

Now you can navigate to **Monitoring | Event Reports** and run your event report.

Events Tab

Users, doors and areas have an **Events** tab which shows the most recent events for that record. This is a quick way to find out the last time a specific door was accessed or when an area was disarmed.

Managing Operators

Operators with sufficient permissions can create and manage other operators in the web client. This allows you to control who has access to view and program the Protege GX system.

Operator permissions are based on their role and security level. For more information about creating these records, see the Protege GX Operator Reference Manual.

Creating an Operator

You can grant someone access to the system by adding a new operator.

1. Navigate to **System | Operators**.

2. Click **Add** and give the operator a **Name**.

3. Enter the **Username** which the operator will use to log in to the system.

4. Click **Change Password** to set the operator's password. This must comply with the password policy for the web client.

5. Select the operator's **Role**. This determines which records the operator is allowed to view and edit.

6. Click **Save**.

Setting the Password Policy

You can encourage operators to create stronger passwords by setting a password policy.

The password policy is currently only available in the web client. This will not affect passwords set in the Protege GX software.

To set the password policy:

1. Navigate to **System | Password Policy**.

2. Click the **Active** checkbox and set the **Length** for each aspect of the password policy that is required:
   - Minimum Password Length
   - Minimum Number Of Uppercase Characters
   - Minimum Number Of Digits
   - Minimum Number Of Special Characters
   - Compare Against Username

3. Click **Save**.

Designers & manufacturers of integrated electronic access control, security and automation products.

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