TDS ACCESS CONTROL

Create a Contractor Record

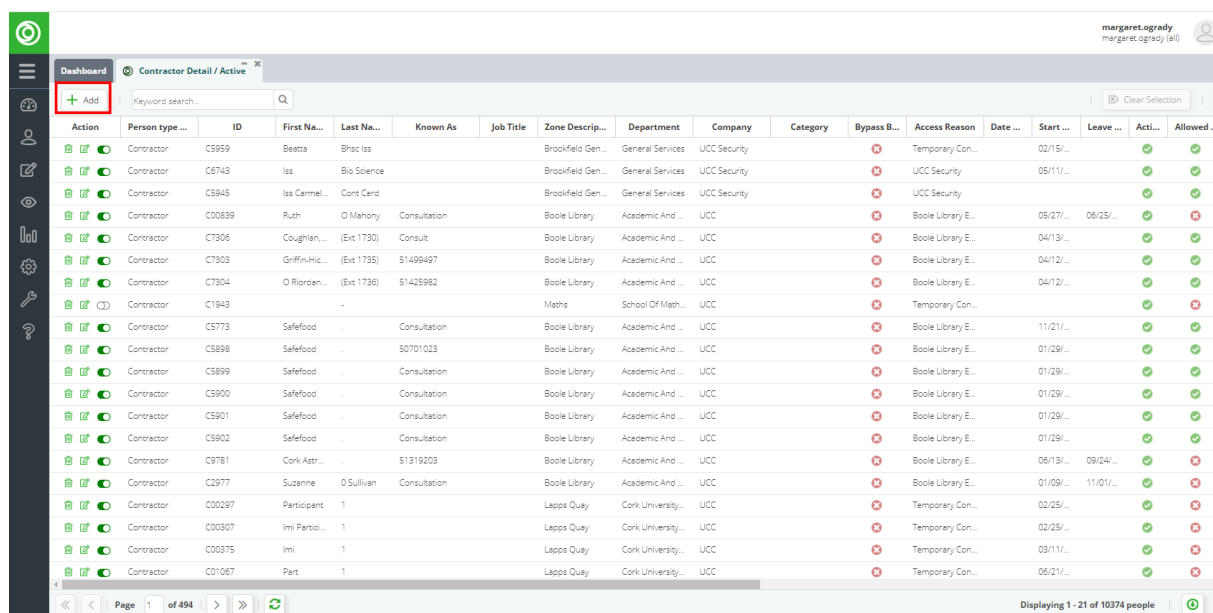# Contents

Create a Contractor Record

From the **Maintain** menu select **Contractor Detail**
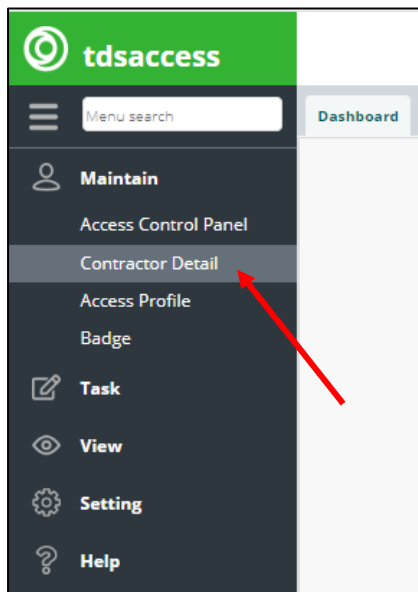
1. To set up a new Contractor, click on the **Add** button on the top left corner of the screen.

2. Enter the following details on the screen below:-

    Note all mandatory fields are marked with an *
    - Person ID (Automatically generated)
    - First Name*(Mandatory)
    - Last Name*(Mandatory)
    - Company - UCC is company 7

- Uncheck "T & A posting"
- Uncheck "Is A Sponsor"

3. Click on ***Employment** to display Employment Form fields.

4. Enter the following Employment details:-

- **Department ***(Mandatory)– Select from pick list

- **Start Date –** is defaulted to the current date.

5. Click on ***Access** to display Access Form fields.

6. Enter the following access details:-

    - **Zone Description** *(Mandatory) – select your department zone from the pick list

    - **Access Reason:** Select Temporary Contractor from the pick list

7. **Click 'Save' Button**. The Person ID will be auto generated with '**C**' in front of the number. As this number is system generated it cannot be changed**.**

8. The Contractor Detail record is displayed on screen

Assign a Badge

1. From the **Maintain** menu select **Access Control Panel**
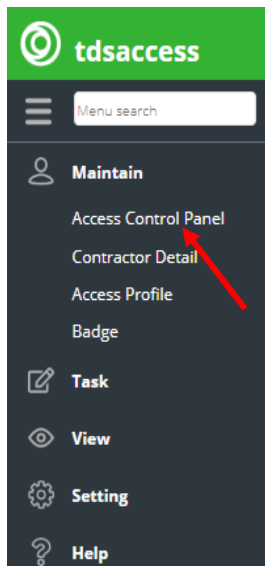
2. Select the Person by entering the Contractor's name or ID on the ACP Person combo.
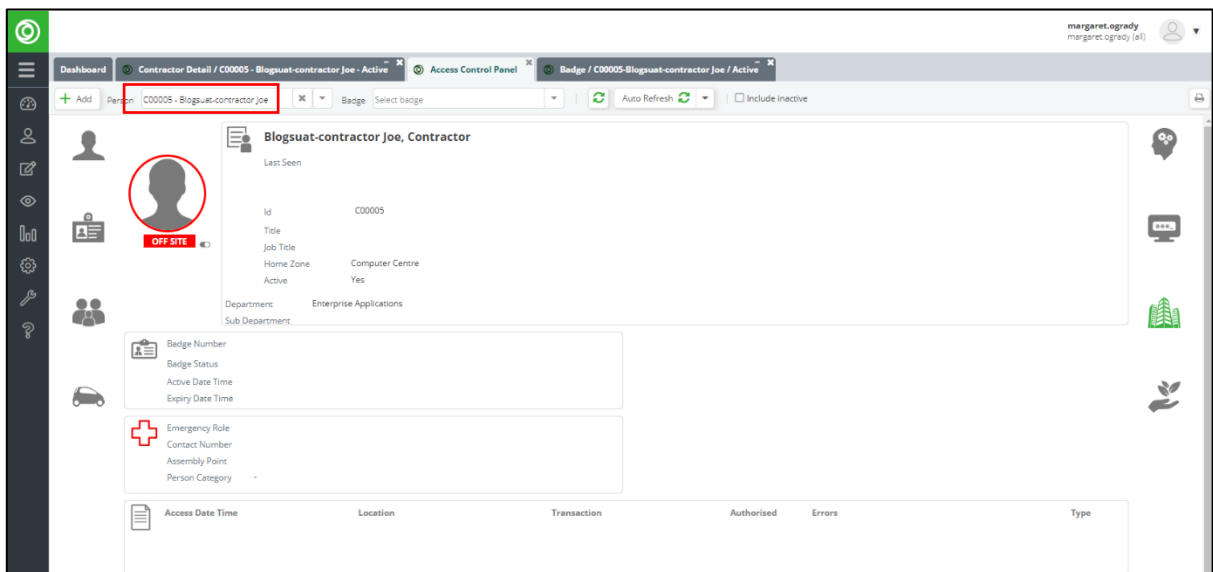
3. On the Access Control Panel click on the **Badge** icon to open up the badge portlet.

4. Click on **Add** button.

Enter new badge number (This number is displayed on the front of the contractor card):-
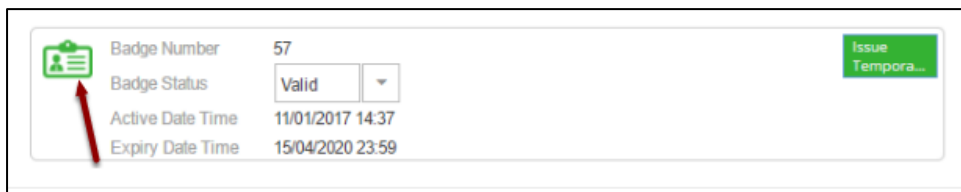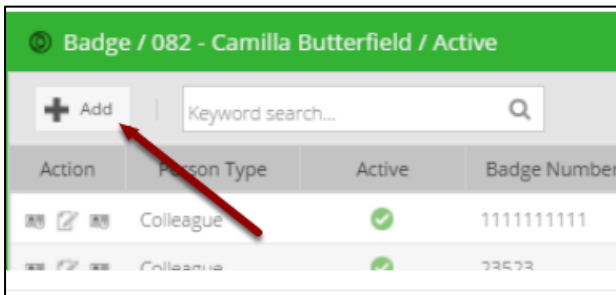**Note all mandatory fields are marked with an ***

*   **Badge Number*** (mandatory),
*   **Version** * (mandatory – this should be set to 1)
*   **Active Date** for the badge (this will default to the current date and time),
*   **Expiry Date** can be entered if known or it can be left blank and entered at a later date

5. Once the required data is entered click the **Save** Button and a badge record (with badge status = Valid) will be displayed in the portlet.


Note:
You cannot allocate a new badge to a person who already has a valid badge. Any existing valid badge must be reclaimed first by clicking on the red reclaim badge icon in the Action column.

Reclaim a Badge

Badges need to be reclaimed before a person can be assigned a new valid badge and also before the same badge number can be assigned again.

Note: Only Contractor Badges can be reclaimed – Staff or Student Badges cannot be reclaimed.

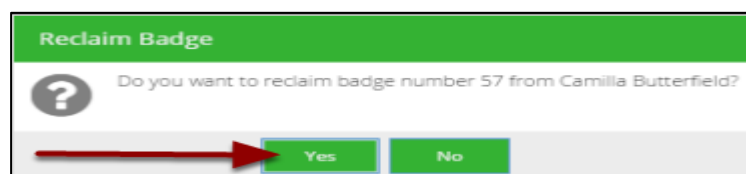1.   From the **Maintain** menu select **Badge**
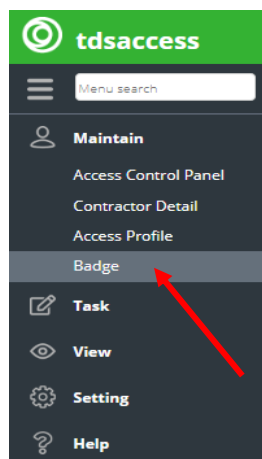
2.   Enter the **Badge Number** in the Keyword search box on the Badge Portlet

3.   Click the **Reclaim** icon on the left of the Action column for the Badge to be reclaimed.

4.   Click **Yes** to confirm

Once confirmed the badge status will be changed to reclaimed and the action icons will be greyed out on the portlet.

> Note:
>
> Once a badge is reclaimed this cannot be undone. If a badge is reclaimed by mistake it must be added again.
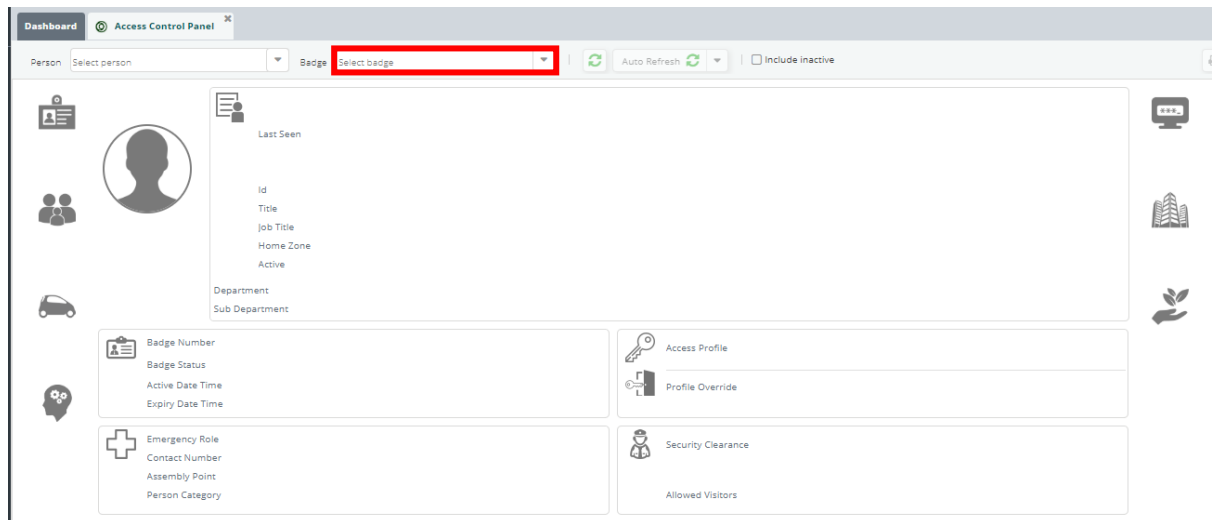
Assign Access Profile

Access profiles can be assigned to people via the Access Control Panel. A person's access profile is a list of all their assigned access groups. The active date/time indicates from when the person has access to the doors in the access group. Once the expiry date/time is reached, the person will no longer have access to doors linked to that access group

> Note: Access Groups are created originally within the Reference Data

1. From the **Maintain** menu select **Access Control Panel**
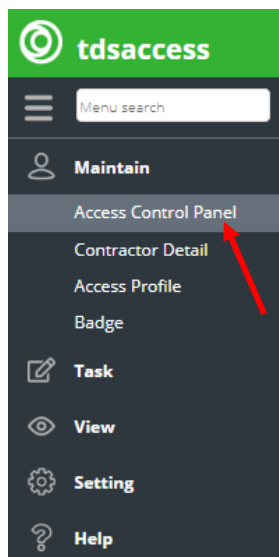
2. Enter the Contractor **Badge Number** into the Badge field to retrieve the Contractor details. (*You can also search by the Person's Name using the first search box at the top left of the screen*).

3. Click on the **Key** Icon beside **Access Profile** to open the Access Profile Portlet
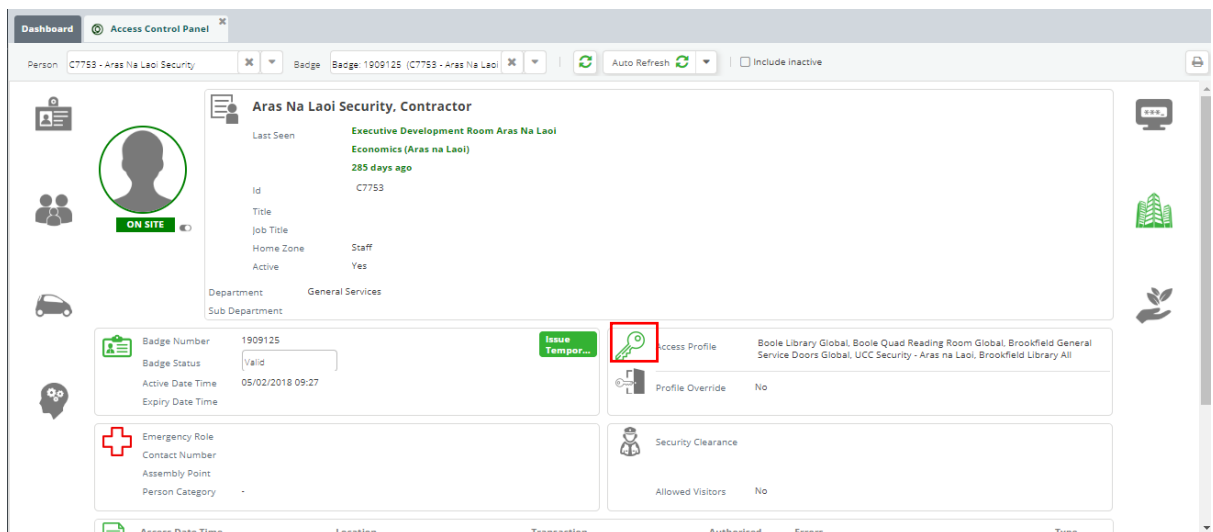
4. Within the Access Profile Portlet, click **+Add** button to assign a new Access Profile for the Contractor.
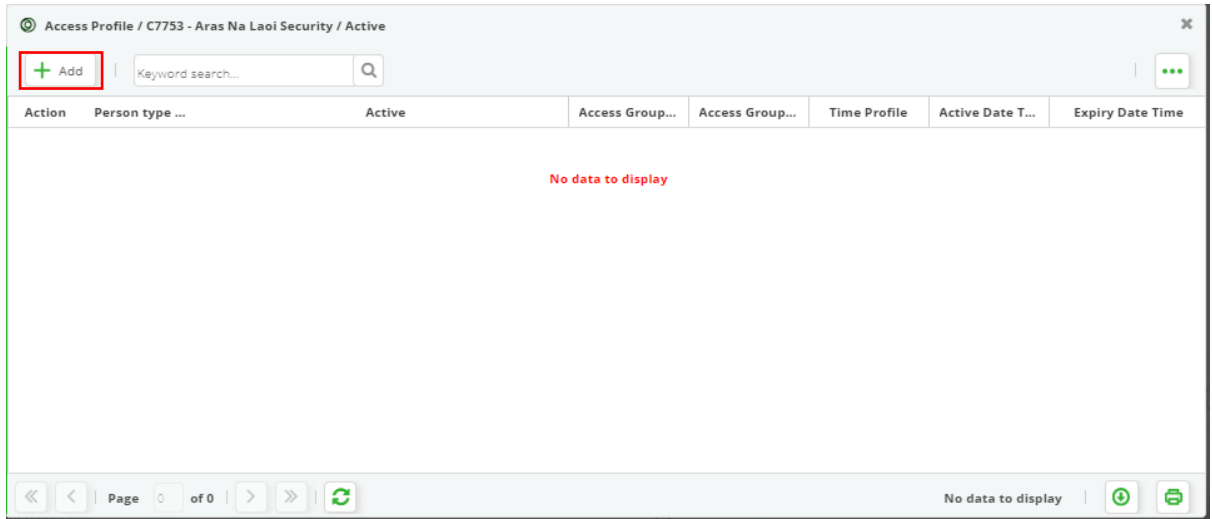
5. Enter new access profile information for the Contractor. **Note all required fields are marked with an *
    - **Access Group *(required)** can be selected by using the drop-down arrow or typing in the combo to search.
    - The **Time Profile** can be left blank as the time profile was already assigned when the access group was created.
    - The **Active Date Time *(required)** will default to the current date and time and can be changed as required.
    - If you wish the contractor to have access for a particular length of time you can enter an **Expiry Date and Time** against the access profile.
6. The **Save** button will remain greyed out until all the required fields are entered. Click **Save** to save all your entries.