



TDS ACCESS CONTROL

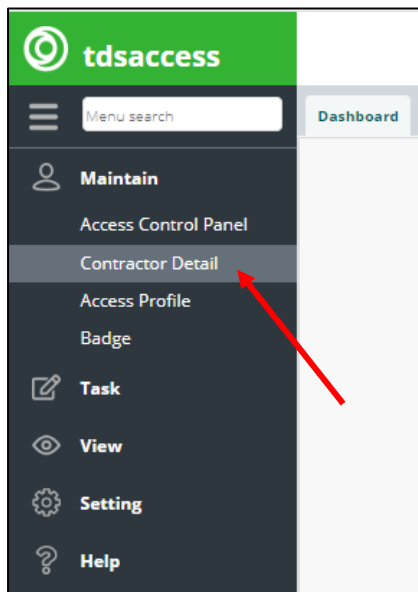
Create a Contractor Record

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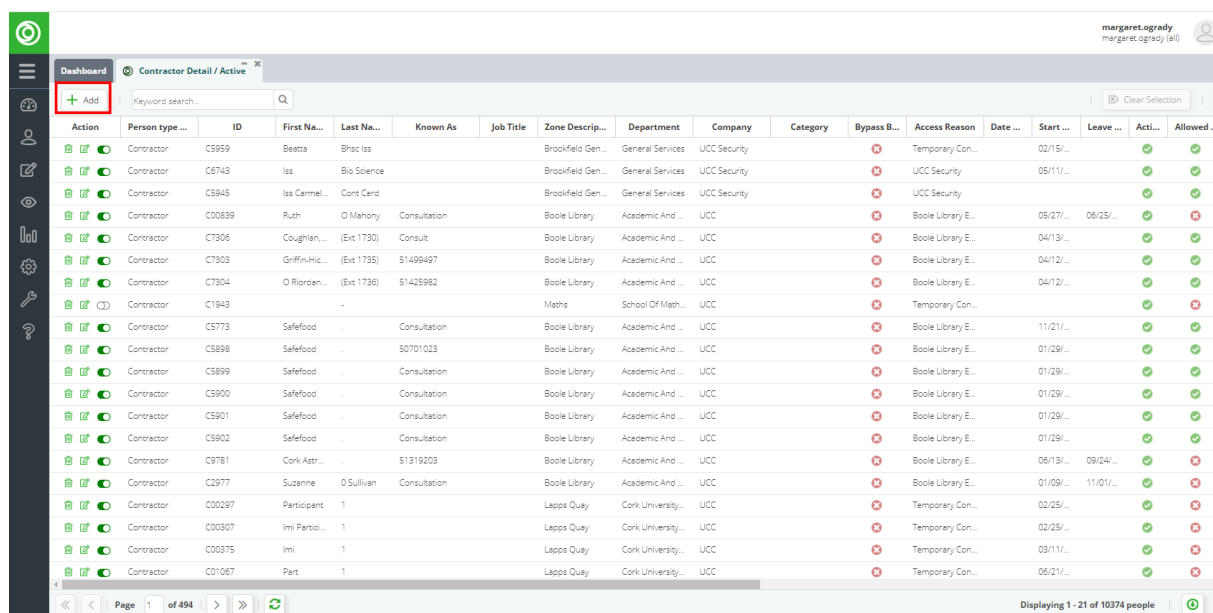
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Create a Contractor Record

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.

The screenshot shows the 'Add Person' form with the following fields and values:

- Person Type: Contractor
- Person Category: Select person category
- Person ID: Automatically Generated
- Gender: Select gender
- Title: Select title
- Active*: Check to mark active
- First Name*: Joe
- Allowed Visitors: Check to allow
- Last Name*: Blogs UAT
- T & A posting: Check to allow
- Known As: Enter known as
- Is A Sponsor: Check to allow
- Other Names: Company*: 7 - UCC
- Birth Details: Job Title: Select job title
- *Employment: Department*: H506 - Enterprise Applications
- Sub Department: Select sub department
- Start Date: 02/06/2020
- Leave Date: mm/dd/yyyy

At the bottom right, there are three buttons: 'Res...', 'Save', and 'Canc...'. The 'Save' button is highlighted with a red box and a red arrow points to it from the text above.

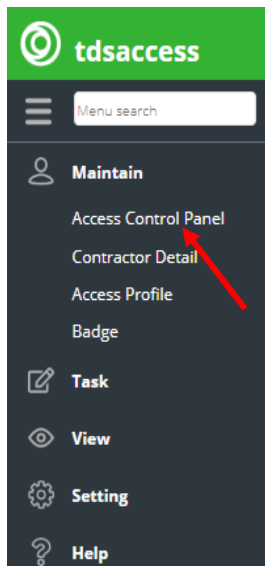
8. The Contractor Detail record is displayed on screen

The screenshot shows the Contractor Detail record displayed on the screen. The record is shown in a table format with the following columns and data:

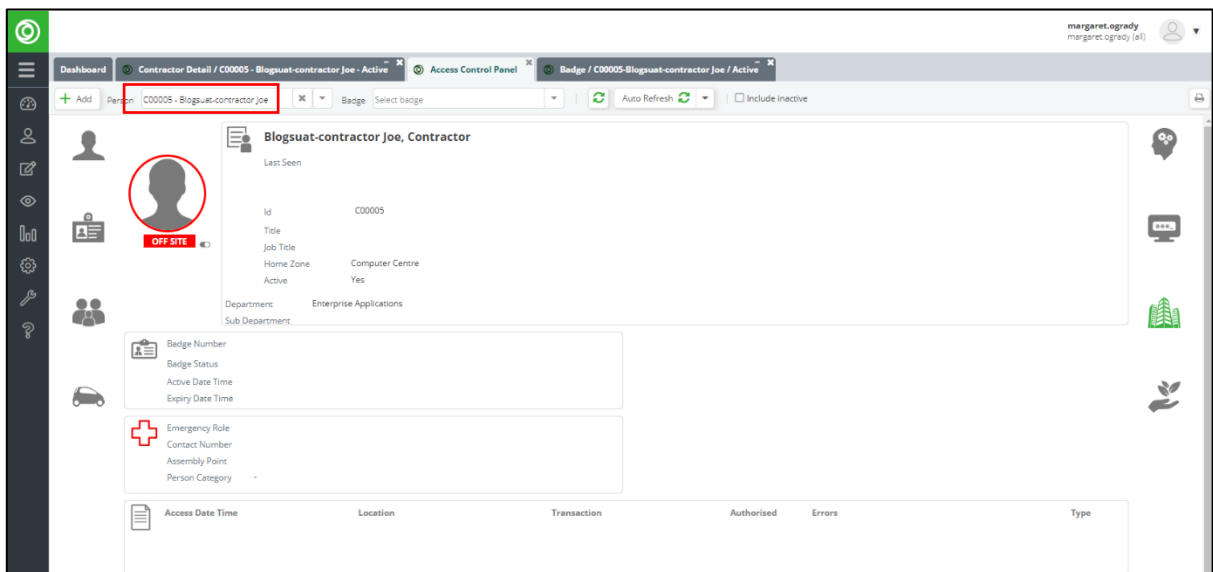
| Action | Person type ... | ID | First Na... | Last Na... | Known As | Job Title | Zone Descrip... | Department | Company |
|--------|-----------------|--------|--------------|------------|----------|-----------|------------------|--------------------|---------|
| | Contractor | C00005 | Blogsuet-... | Joe | | | Computer Cent... | Enterprise Appl... | UCC |

Assign a Badge

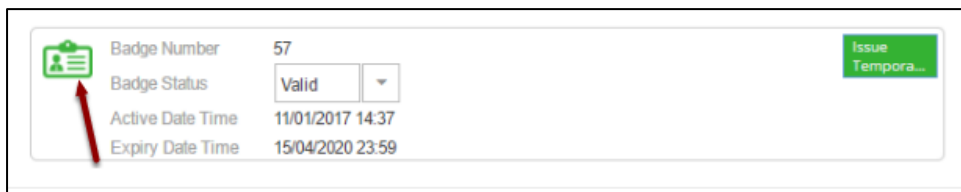
1. From the **Maintain** menu select **Access Control Panel**



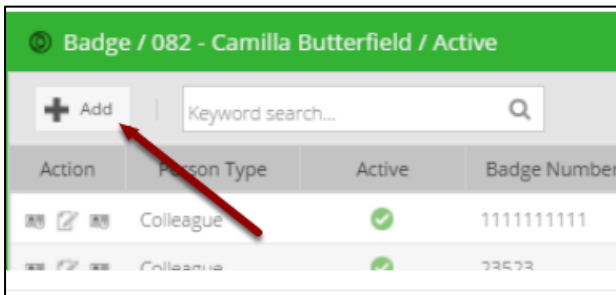
2. Select the Person by entering the Contractor's name or ID on the ACP Person combo.



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:

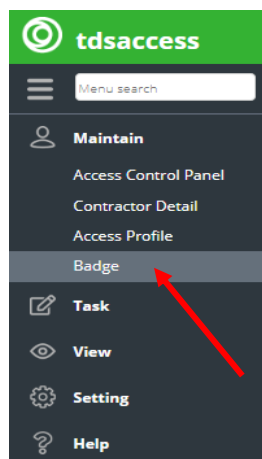
You cannot allocate a new badge to a person who already has a valid badge. Any existing valid badge must be reclaimed first by clicking on the red reclaim badge icon in the Action column.

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**



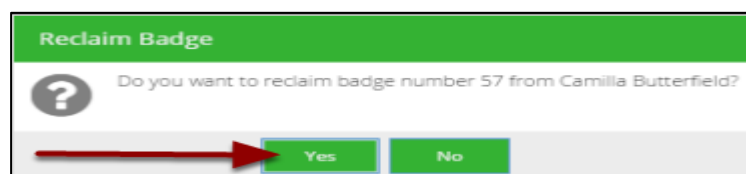
2. Enter the **Badge Number** in the Keyword search box on the Badge Portlet



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:

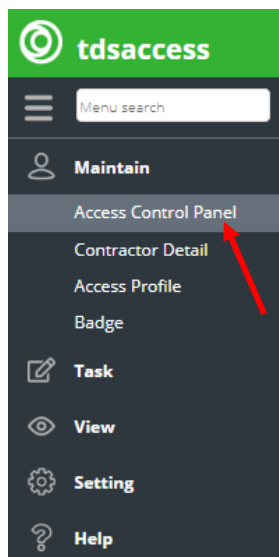
Once a badge is reclaimed this cannot be undone. If a badge is reclaimed by mistake it must be added again.

Assign Access Profile

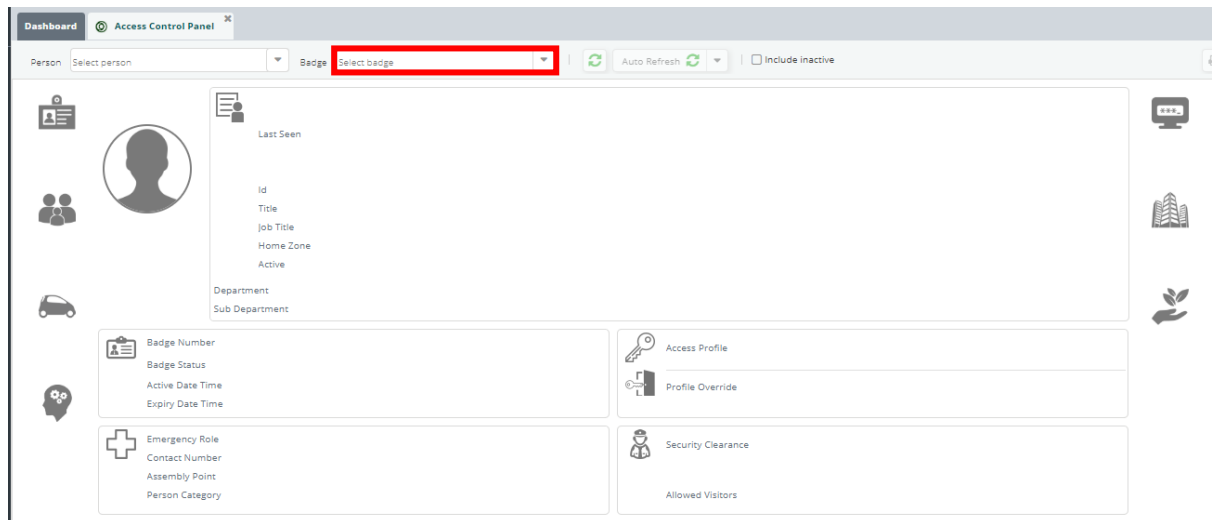
Access profiles can be assigned to people via the Access Control Panel. A person's access profile is a list of all their assigned access groups. The active date/time indicates from when the person has access to the doors in the access group. Once the expiry date/time is reached, the person will no longer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

Note: Access Groups are created originally within the Reference Data

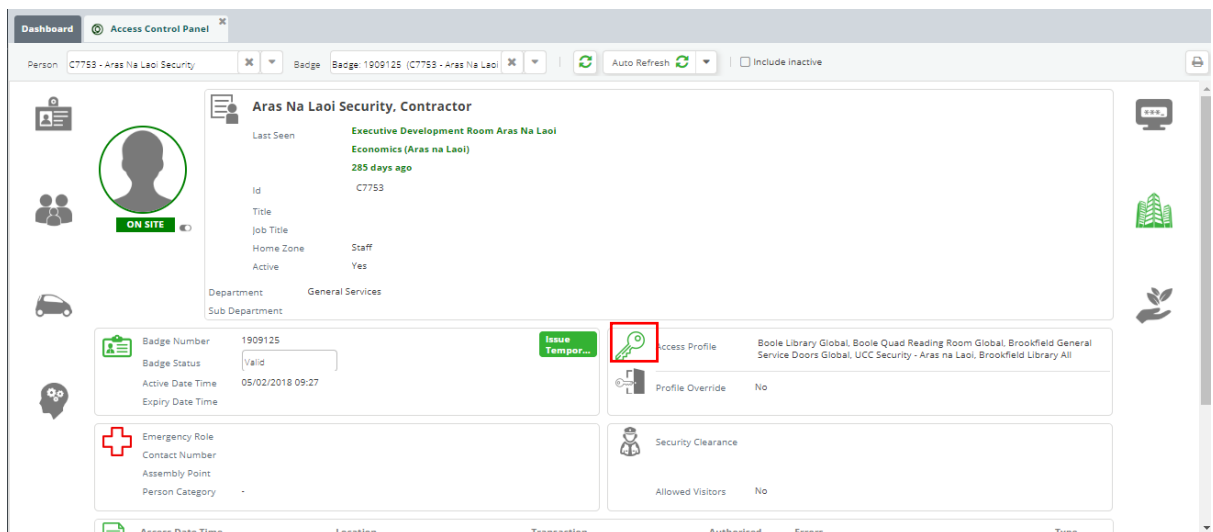
1. From the **Maintain** menu select **Access Control Panel**



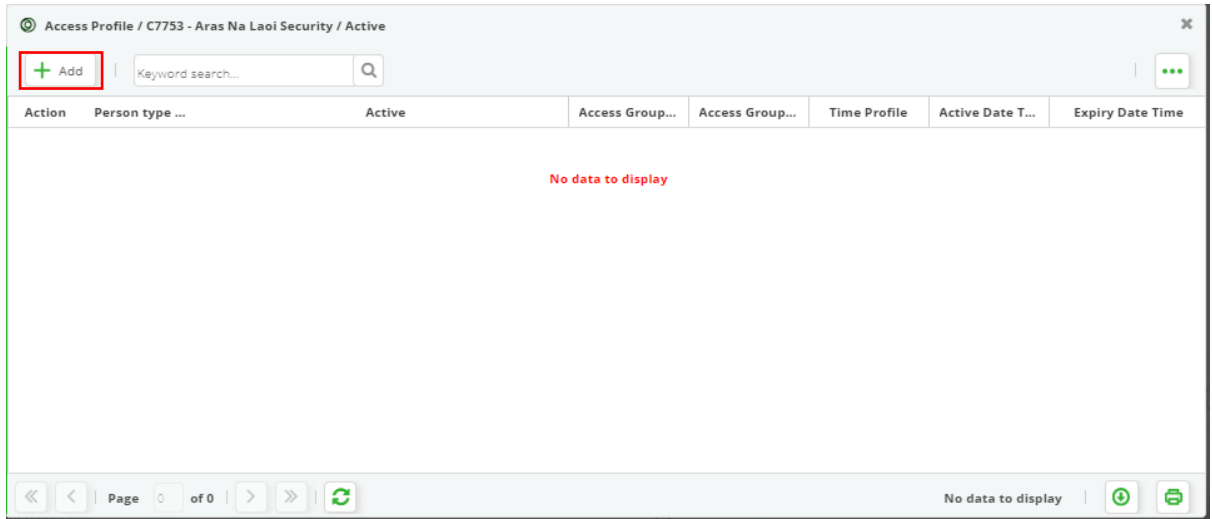
2. Enter the Contractor **Badge Number** into the Badge field to retrieve the Contractor details. (You can also search by the Person's Name using the first search box at the top left of the screen).



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.

