Cobalt X1 User's Guide

Revision History

Revision Date	Description
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Introduction

Welcome, we hope you'll enjoy your experience with the Blue Access Cobalt X1 Web-app and that this guide will enhance your time with us.

Cobalt was designed with the end-user in mind. Cobalt is a web browser based application designed to run on any modern browser which at the time of this writing are IE 10 or higher, Chrome 55.0., Safari 6.2.3, 7.1.3, 9.1.3 (depending on the device) or FireFox 50.1.0.

Cobalt assumes that the user is familiar with the basic tenets of an access control system (ACS), but the work flow is specifically designed to lead the user through the system configuration and maintenance.

The complete Blue Access Cobalt ACS is made up of the Web-app, along with other components like Active Directory Bridge, Elevator control, Badge Printing, Video Management Integrations and more.

The Cobalt Web-app is the primary application used to control and monitor the Blue Access ACS. Window services are automatically defined to provide the back-end functionality of the Blue Access ACS.

In this document, we will cover the use of Cobalt along with the basic concepts of the Blue Access ACS. Before we begin, let's spend just a few moments reviewing the history of Blue Access ACS development.

Cobalt Web-Application & Thick-Client

This is a convenient place to touch on why there are two products, the Cobalt Web-app and Cobalt's Thick-Client. The Cobalt Web-app is the software interface for day-to-day users. It is easy to use and supplies the features required on a regular basis. When Cobalt is used, certain server components are required to run in the background. The Cobalt Thick-Client supports configuration of some advanced features.

Scripting is an example of an advanced feature where the Cobalt Thick-Client is used for configuration. Scripts are a powerful feature that can execute multiple system operations with a single click, for example, a system lockdown of all doors. The Cobalt Thick-Client allows for the script configuration, while Cobalt's Web-app allows for the execution of predefined scripts. The Cobalt Thick-Clients configures the add-on products like Active Directory, Elevator controls, VMS integration, etc….

Before we get too far along into this guide, let's go over a few acronyms and terms that frequently used in this document but may not be familiar to you.

Acronyms and terms

ACS – stands for Access Control System.

System – refers to the Blue Access ACS, the two terms are interchangeable

Web-App – refers to the parts of Cobalt that are accessed thru the use of a web-browser. This is the primary interface to the Cobalt system.

Thick-Clients – refers to the parts of Cobalt that are accessed thru Windows programs. These programs are used for specialized configuration and testing.

Credential – can either be a physical badge or a PIN code.

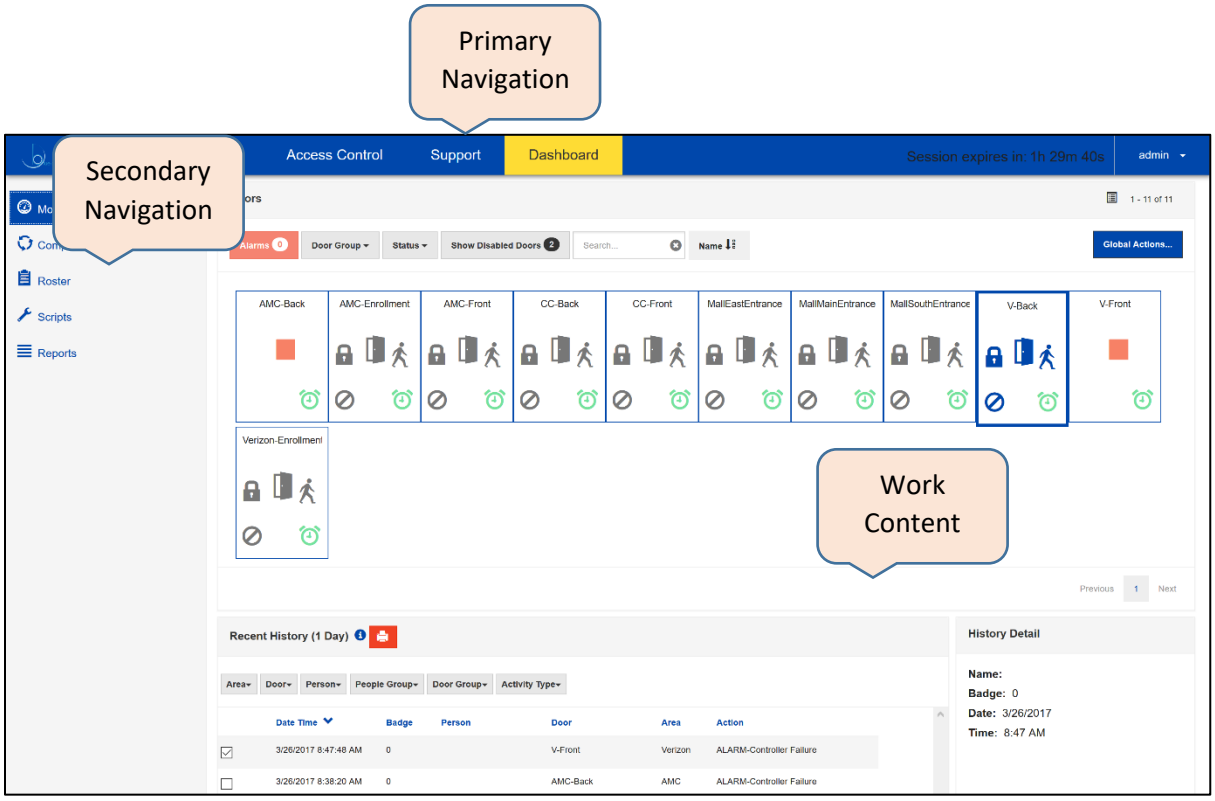
Reader – is an ISONAS PowerNet™ reader.

Door – well, it's a door but it is presumed to have a reader attached along with an electronic strike.

Lockdown – A door state that will reject most cards. Typically used in emergency conditions, where there is need to restrict standard access through the door.

Navigation

Let's take a few moments to go over the basic site navigation.



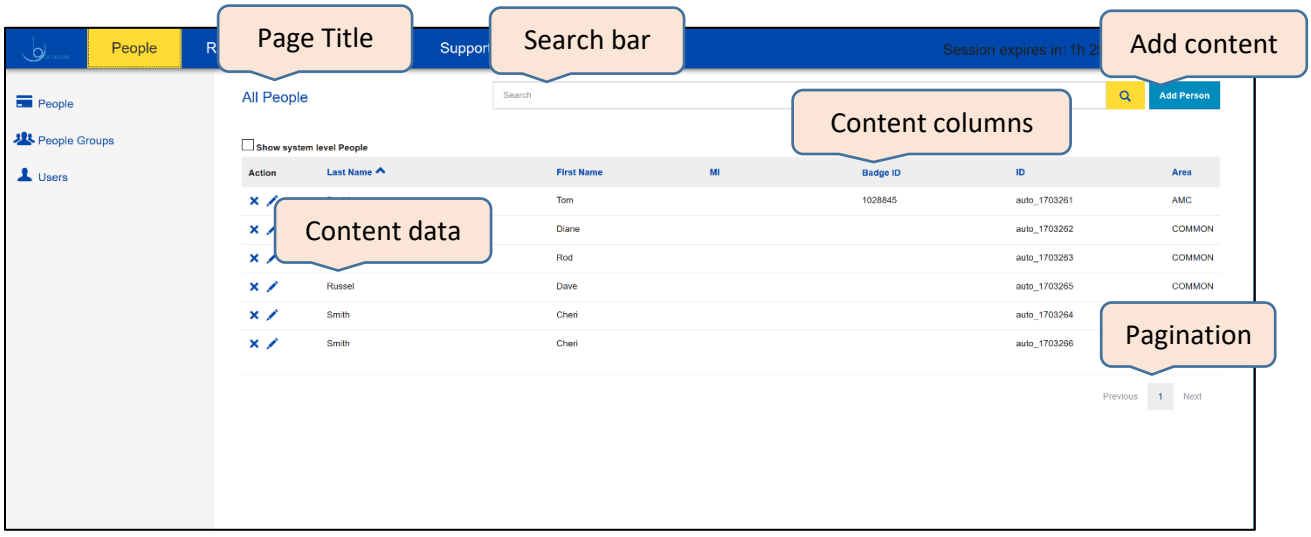
When you click on one of the items in the Primary Navigation, the Secondary Navigation options will change.

When you click one of the options in the Secondary Navigation, the Work Content will change.

Next, we'll discuss the basic layout of the pages within the site, we will use the Primary Navigation People option for illustration purposes.

Page Navigation

The work content area is consistent wherever possible through the entire Web-app and the basics are listed in the following image.



Let's discuss some of the work content main features.

Search bar

The search bar always works to filter the content data portion of the page. As the user types in the search bar, the application will automatically search every column of the displayed data for matching text and filter the content data to match the search criteria.

To clear the content of the search bar, you click on icon within the search bar itself.

Add content

The Add content Add Person button will display the appropriate page that will allow the user to add additional rows of data to the content data. In the People example above, the user would be presented with the page to add a new person to the system.

Content columns

The columns of data displayed are always sortable by clicking on the column heading. The up or down arrows indicate which column is currently sorting the display, and the sort order (ascending or descending).

There is always a special column labeled Actions , this column represents the available options for working on the content data. The will perform the delete option (after prompting the user of course) and the option will allow the user to update the content.

Content Data

This is a list of all the information that the logged in user is authorized to see. These lists are always filtered on the Users assigned areas which will be discussed in detail later.

Pagination

The pagination section

allows the user to either page forward or backward through the content data displayed. Alternately, the user may select any one of the page numbers to jump to that page directly.

Reports

Whenever a report is available within the page content, a symbol will be present. Clicking on the symbol will produce a report in a PDF format which you then save, print or email.

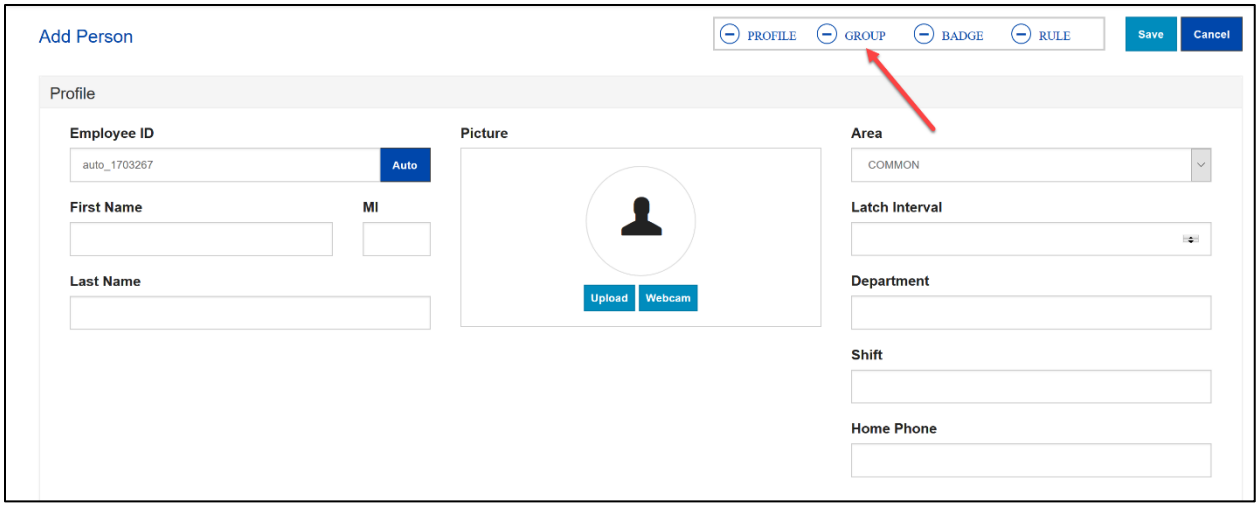
Not available

If an option is not available, then the standard symbol will be displayed.

Progress Indicators

Continuing with our example involving People to demonstrate the navigation and usage of the Cobaltapplication, we would like to cover one more topic that you'll see throughout the application. In the next screen image, you will notice a section of the page that looks like this:

We refer to this type of box within a work content as the progress indicator.



This progress indicator is the users notice that to add a person, there are 4 steps to complete: Profile, Group, Badge and Rule. As each step is completed, the progress bar will respond by setting the step to green check mark as seen below.

The use of progress bars helps guide the user who may be unfamiliar with the task or, have forgotten how to perform the task.

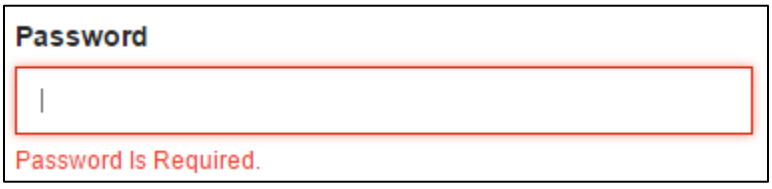
The progress indicator does not always look exactly like the one depicted, instead they appear in a way that makes sense given the task that the user is trying to complete.

Committing or Canceling

On pages where the user has entered information that they want to store in the ACS, they will typically see a Save and Cancel button

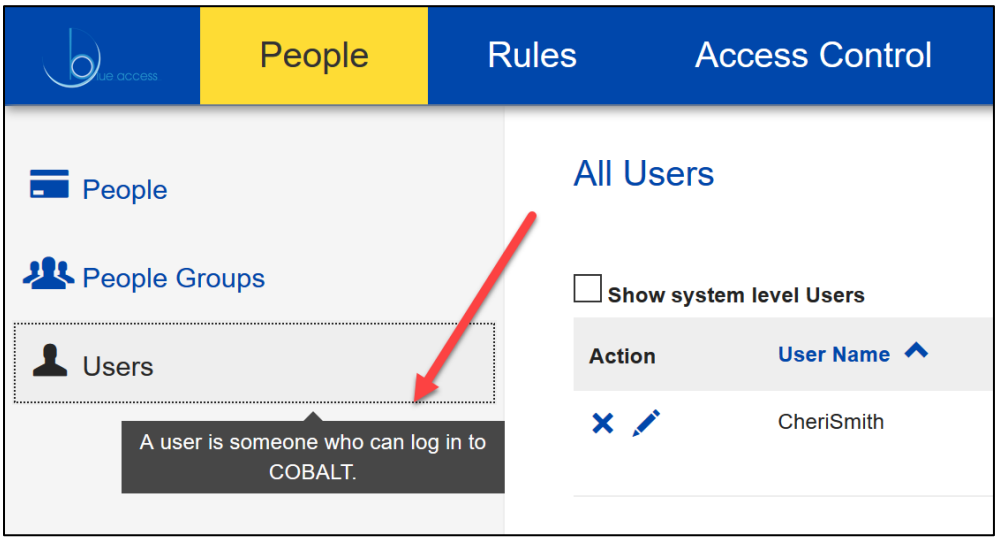
. Clicking on the Save button will attempt to commit the user information to the ACS and display either a “SAVE success” message or an error will be displayed, clicking on the Cancel button will disregard the user information.

Error messages appear on the page and are typically bordered in red with some red text under the error to guide you in correcting the problem. For example, when you are entering a User and forget to assign them a password, the resulting error shows up like the image below.



Context help

In some places throughout the application, it is convenient to display some meaningful help text just to clarify the meaning of what the user is seeing, in those situations the help will be displayed when the user places their mouse pointer over a screen section, this is known as mouse-over help. Here is an example of some mouse-over help that is displayed on the Secondary Navigation page within the Primary Navigation People.



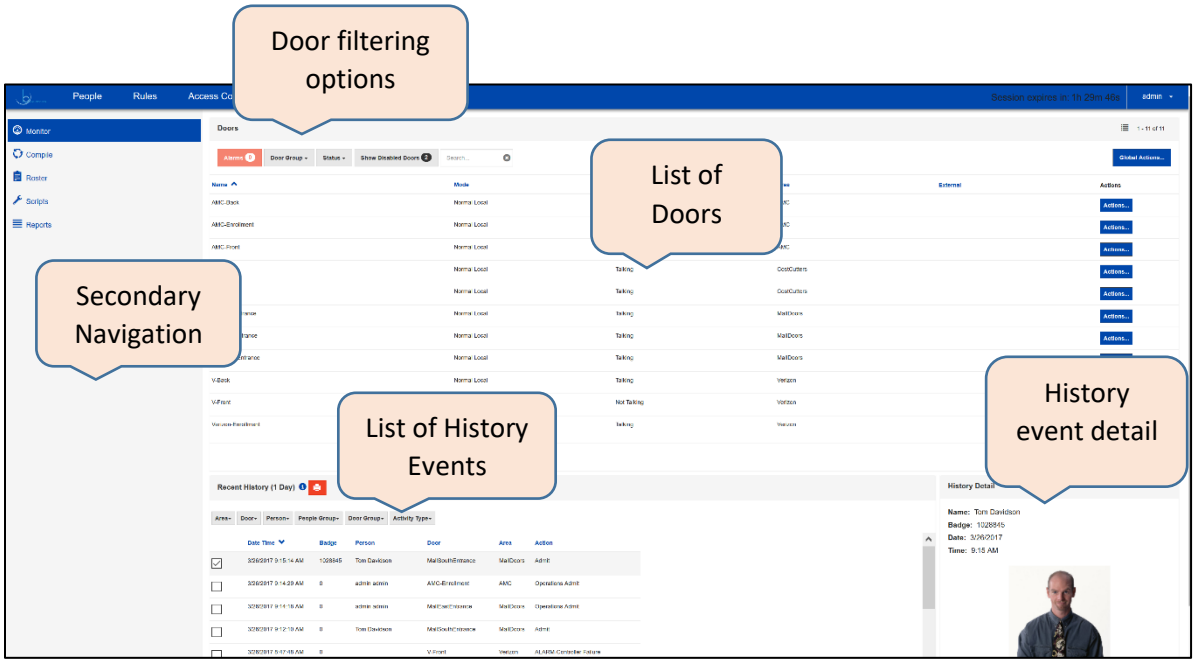
In the above example, the mouse-over help text was automatically displayed when the user placed their mouse pointer over the Secondary Navigation menu option “Users”

Responsive design

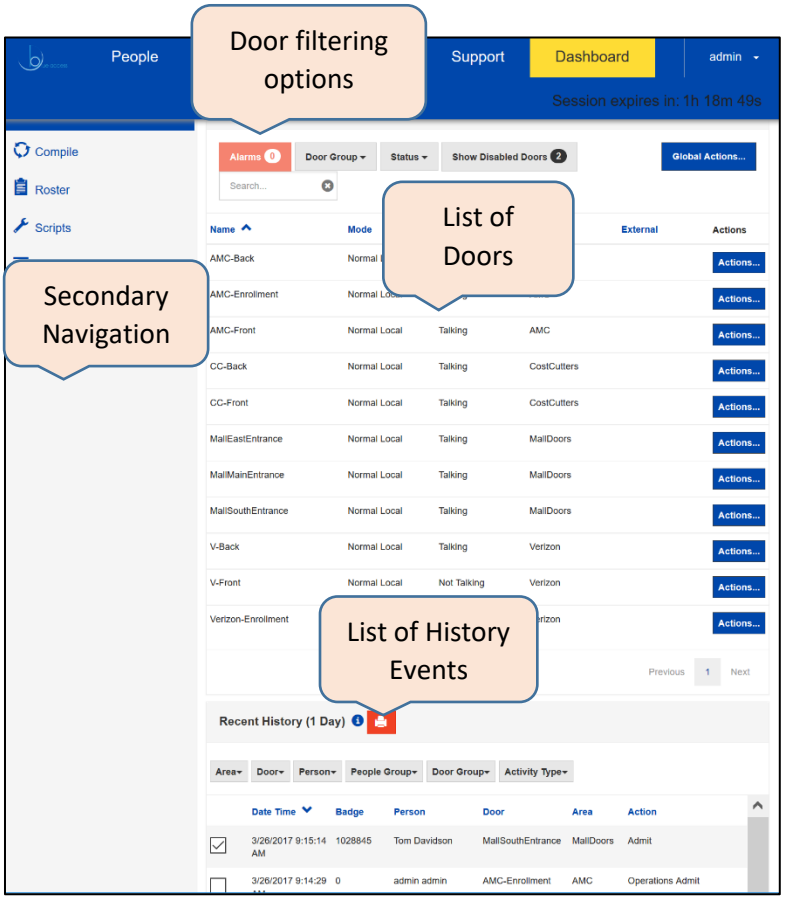
The entire Web-app was designed to respond correctly to any form factor, PC Monitor, Tablet, or mobile device. You can see the responsiveness by modifying the display area of the page in your browser. In most cases, the page will respond to reduced screen area by shrinking and/or moving sections around on the page. In some cases, a completely new page layout will be selected when the screen area passes a certain minimum threshold.

Let’s look at two examples to illustrate the responsive design.

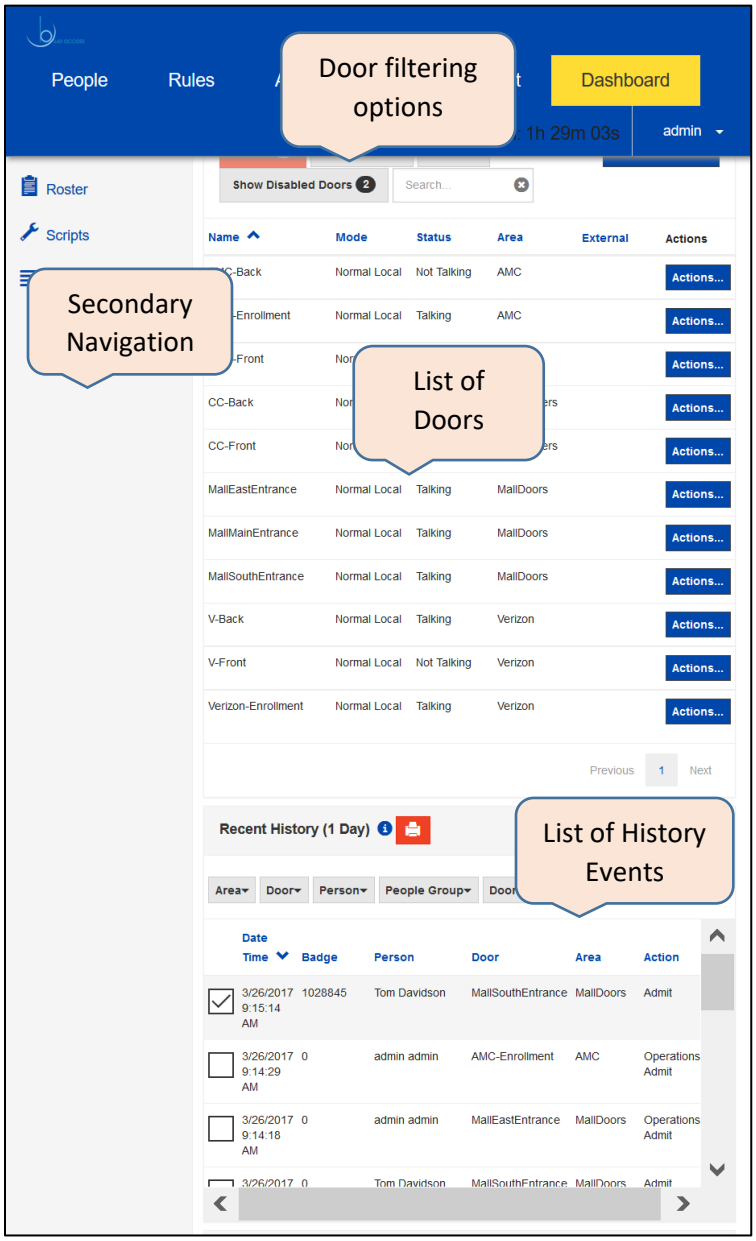
The Primary Navigation option Dashboard looks like the following image when the screen displayed is maximized. We are not going to describe this page now, we are going to use this page as a good example of the responsive design in action. The callout boxes displayed on the image are the ones we want you to pay close attention to during the next few screen shots to see how the content is resized in accordance with the screen area available.



Notice in the image below that when the screen size was reduced, the “History event detail” section dropped off and the column widths in the content data reduced in size as well. Notice that the search bar moved to be below the door filtering option. The history event detail is not missing, you simply would use the scroll bar at the left side of the page to scroll down and find the history event detail section.

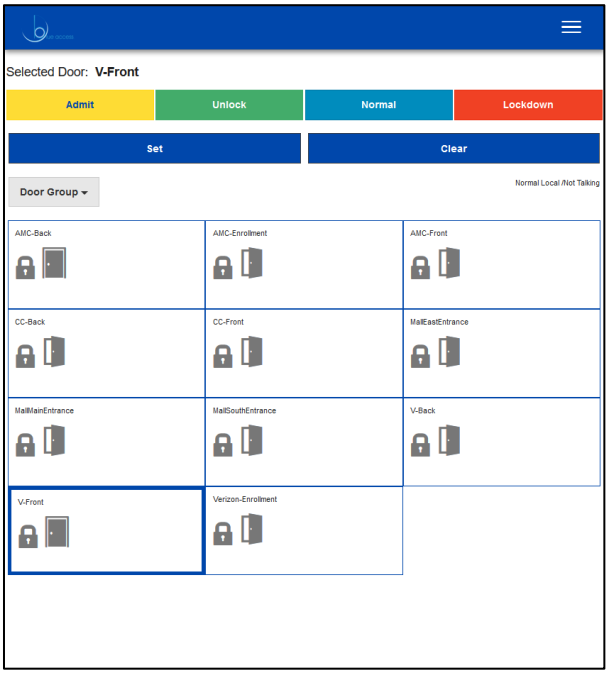


Reducing the page size further will result in the compression of the data on the page but nothing too dramatic.



Further reduction in the screen size demonstrates the last part of our responsive design. When the page passes a certain minimum threshold, a completely new layout will be presented to the user. This is done mainly with mobile devices in mind where the screen real estate is much smaller than other medium and so special formatting techniques need to be employed to make the page useable.

The Primary Navigation menu has been replaced by the , the Secondary Navigation has been removed completely and the content area has reformatted completely to be suitable for a mobile device.



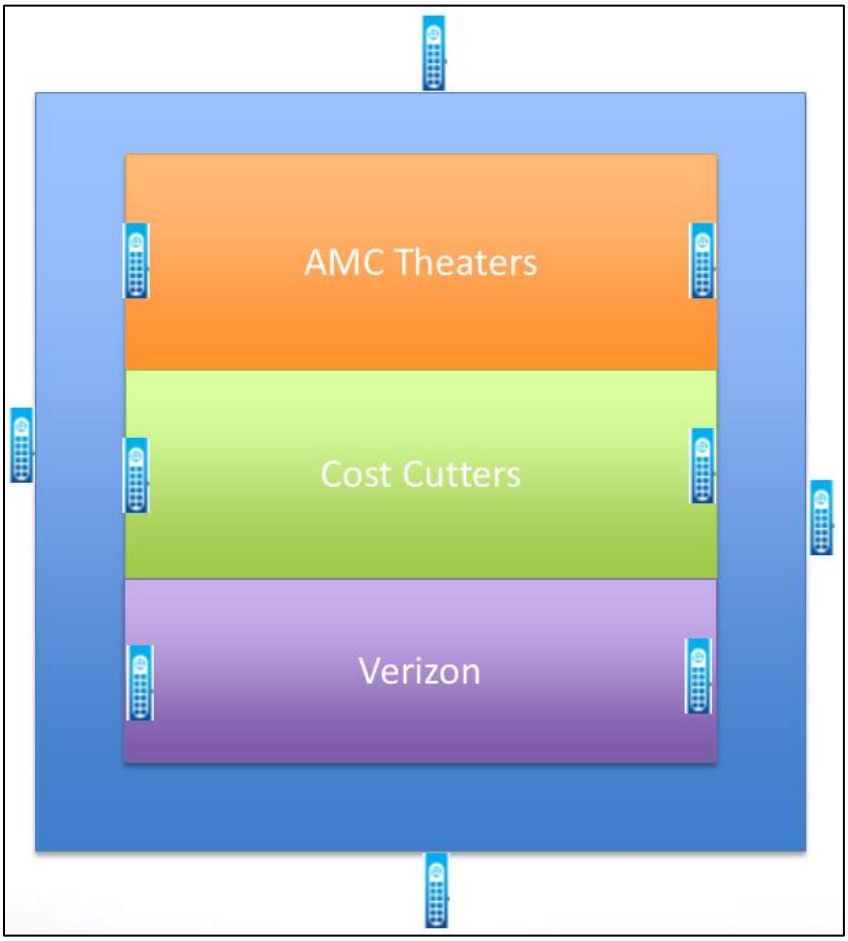
This concludes the discussion on the basic screen navigations of the Cobalt application. We hope that you find the consistent usage of navigation increases your retention rate and decreases the need for training. Our target was to provide a rich user experience through pleasing colors, easy navigation and a solid responsive design.

Functions and Features

In the next section of this document, we will walk you through each page available in the Cobalt application. We will use a fictitious predefined customer site depicting a common usage of the system.

At this customer site, there is a shopping mall. The mall has 4 exterior doors. In the mall are 3 stores, each store has a front and back door. The mall also has an employee break room which we might call a common area. There are mall employees that do not work for one of the interior stores, and there are store employees that do not work for the mall itself. All mall employees must have access to all the mall doors, but never access to any of the interior store doors. Conversely, all the interior store employees must have access to the store at which they are employed and at least one mall entrance door. Lastly, all employees to either the mall or one of the stores must have access to the break room.

Here is a picture of the fictitious shopping mall to help you visualize what we are presenting. Take note that the mall has 4 exterior doors, there are 3 interior stores each with a front and back door.



To better understand the fictitious customer site that we are going to use in this document, it is important that you understand a few global tenets of the Blue Access ACS.

Global Tenets

The Blue Access ACS has a set of terms that are common words but they have specific meaning within our application context, these are listed and explained below.

People

People are credential holders of the ACS, these people need to be defined in the system, assigned credentials and then given access to certain doors during certain hours. Optionally, and preferable, people also get assigned to People Groups.

People Groups

People Groups are exactly what the name implies, they are groups of people that make sense to you. For instance, there are typically groups set up for Staff, Consultants, Cleaning, etc. People may belong to one or more groups. When thinking about people groups, think about what groups of people might need access to specific sets of doors during specific days and hours within the day.

People groups are worth spending a little more time talking about because they will greatly reduce the complexity of your ACS configuration.

The system allows you to set up every person in the system with their own set of access rules. The access rule will define which doors the person has access to during which days and time of day; however, this is not the preferred method of configuration.

It is much easier if you set up access rules that apply to an entire group of people, it is easier to visualize, easier to modify and optimizes the speed of the ACS. We will come back to the access rule for groups when we look at the Primary Navigation Rules option.

Users

Users are still people of course, but they are people that will login to Cobalt. A user can also be a credential holder.

Credentials

Credentials are either physical RFID badges or PIN codes that are assigned to People. Whenever we discuss a 'person' having access to a door, we are really saying that the credential or PIN code assigned to that person has access to the door.

Doors

Doors are physical locations that have controlled access via an electronic locking device. The term door is generically used to represent what you normally think of when you hear the word, but it may also stand for any number of controlled access points like cabinets, lockers, etc.

Door Groups

Door Groups are logical grouping of doors that make sense to you. A group of doors might represent a geographical location like "building one" or "North Campus". A group of doors might also represent a logical view like "Exterior" or "Maintenance Closets." Assigning doors to door groups simplifies the configuration of your system in the same way that People Groups which was previously discussed

Shifts

Shifts are a set of valid access hours described for a week. An example would be a shift named business hours where the days Mon – Fri are selected with a starting time of 8 a.m. and ending time of 5 p.m. (we should be so lucky!) You can have as many shifts as you need to configure your ACS.

Rules

Rules utilize (Doors or Door Groups) and Shifts to define a time period when access is allowed. Rules are assigned to either People or People Groups. If there are not any rules defined in the system, then no one would be permitted access through any door at any time. Likewise, if a Person is not assigned to a rule, either directly or via a People Group, then that person would never be permitted access through any door at any time.

Area

Area is a logical grouping of people, doors and data sets like Shifts and Rules. You can set up as many areas in the system as you need which we'll discuss in greater detail in just a moment. Areas can be configured and utilized in Cobalt. The system comes with one predefined area named COMMON. By

default, everything that you add to the system belongs to the COMMON area. You cannot rename or delete the COMMON area.

Here comes an important concept regarding areas: A User automatically monitors 2 areas: Their Default area and the COMMON area. If the User has other areas assigned, then they will also monitor those areas. This will be explained in greater detail shortly but it is important that you remember this concept.

Let's discuss the use of Area in context of our fictitious shopping mall. The mall has 4 exterior doors that all the Mall or interior store employees will need access to; it makes sense to assign all of these exterior mall doors to the same area. Within the mall, each interior store has a front and back door, it makes sense to define an area for each store and assign their front and back doors to that area.

Being more specific, let's name all four of the mall doors to MallWestEntrance, MallSouthEntrance, MallMainEntrance and MallEastEntrance. Each of these mall doors we will assign to an area we configured call MALL.

Now let's name one of the interior stores doors, the interior store is Cost Cutters and the front and back doors are named CC-Front and CC-Back. Because the interior store Cost Cutters represents a logical group, it makes good sense to define an area, let's say CostCutters and then assign the front and back door to that area.

Now that we have some areas defined, we can go about the rest of the business of configuring the system. We go in and configure the doors, door groups, people, shifts, rules, etc. for interior store Cost Cutters and we assign them to the area CostCutters. We then go through the same exercise for Mall itself and assign them to the area MALL.

Finally, we are ready to understand how the Area is utilized in the system. Remember the one concept regarding Areas that we asked you to remember, if you don't remember it now is a good time to go back and review it. Recall also that Users are individuals that login to Cobalt. Let's put it all together and define 2 Cobalt users, one that works for CostCutters and one that works for the Mall in the security department.

When you configure the Cost Cutters User, you would assign them to the area CostCutters. What this will enforce is that when the Cost Cutters user logs into Cobalt, they will be able to configure or control items (people, doors, shifts, etc.) that are in the CostCutters area or the COMMON area (remember, Users always get their assigned area and COMMON).

Now let's configure the Mall User and assign them to the MALL area. This means that when the mall User logs in to Cobalt, they will only be able to configure or control the items in the MALL or COMMON area.

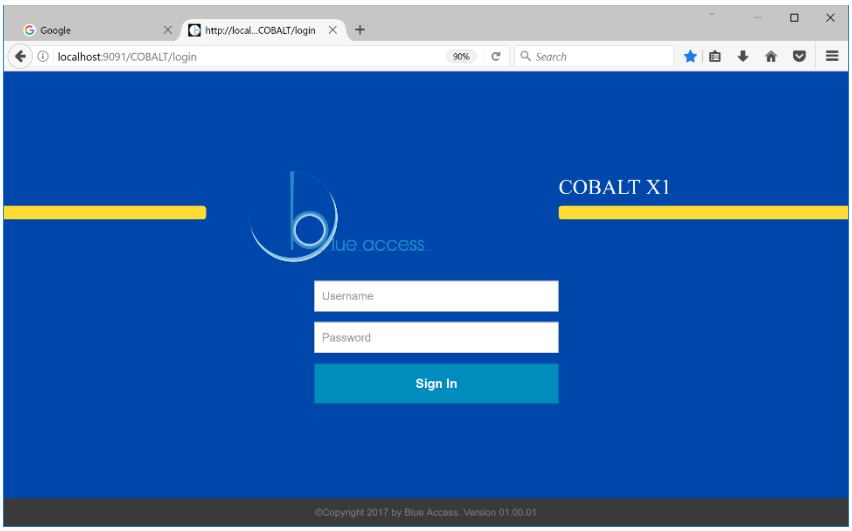
Ready for one more important concept regarding areas? The built-in user Admin always gets access to all areas, always.

Login

The Cobalt Web-app's default URL is: **http://localhost:9091/Cobalt/login**

Cobalt starts as all applications do with a login screen. The login page requires a username and password and then the user must click the Sign In button; pretty standard stuff these days.

The username and password can be maintained within Cobalt. The built-in username of "admin" is also available in Cobalt if the user knows that logon's password.

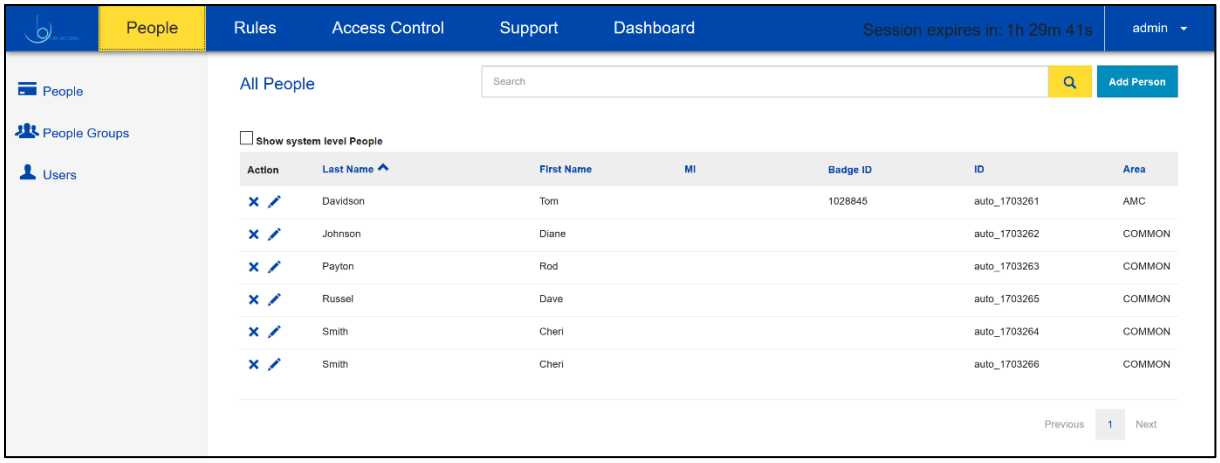


Upon a successful login, the application will default to a set location, this is known as the landing page. Cobalt displays the Primary Navigation Dashboard option as its landing page, this was done because when a typical user logins in, the primary options that they are looking for are available on this page.

The landing page that Cobalt selected is great for day to day usage; however, it does not work well for the sake of this document. For the user's guide, we have decided that working from the left side of the Primary Navigation and working our way right makes for a better document flow.

Primary Navigation -- People

When you select the Primary Navigation People option, you will notice that the Secondary Navigation option has 3 items: People, People Groups and Users.



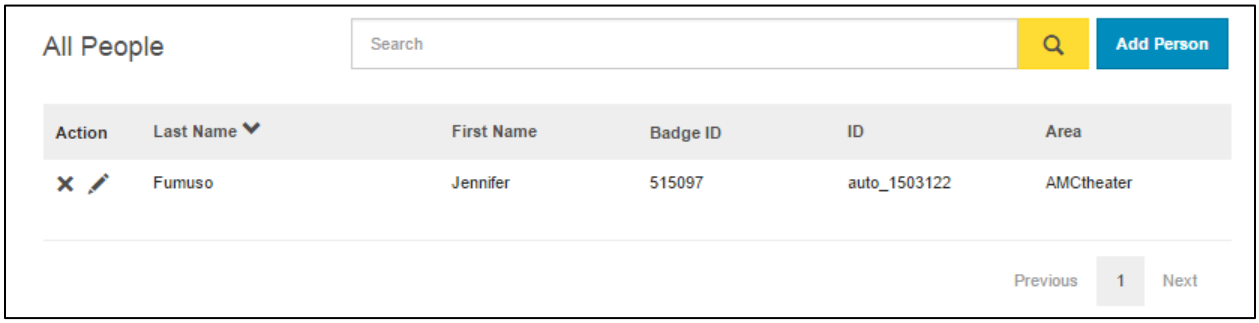
People, People Groups and Users have been defined earlier in this document and will not be readdressed here, please refer to the earlier discussion for clarification on the 3 basic tenets of the Blue Access ACS.

Now let's take a closer look at each of the Secondary Navigation options under the Primary Navigation People.

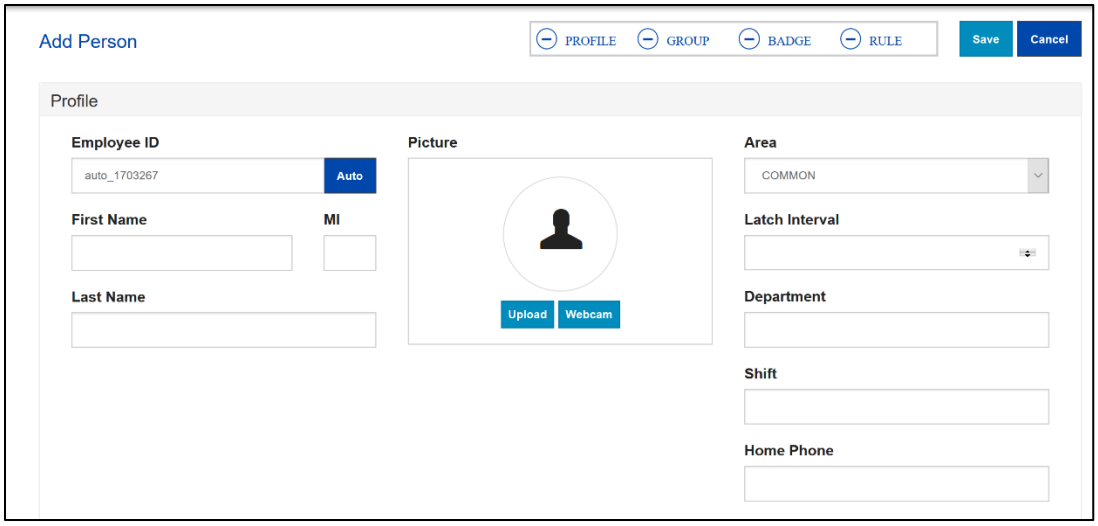
People

Adding a person requires that the user complete 4 steps: one, set up the basic profile of the person with information like first and last name, assign a photo and place the person in an area; two, assign the person to one or more people groups; three, assign the person one or more credentials and/or PIN codes; four, assign the person one or more rules that define the doors that they have access to.

You start this process by navigating to the People page and selecting the Add Person button.



The Add Person page looks like the image below. We will now discuss each item on this page that was not covered under the Navigation section of the document.



Employee ID is a unique identifier for this person. This field can be auto populated for Cobalt by clicking on the **Auto** button. Since this is the default most often selected by our users, the Employee ID always comes up with an auto populated value. You may remove the auto populated value and put in a unique identifier of your own; however, this is not recommended.

First Name, MI, and Last Name are exactly what you think they are.

Picture is a place that you may capture a photo of the person. You have two options for capturing a photo, you can upload one from a file located someplace on your PC, or, if you have a webcam attached to the PC you can capture a photo from that device.

When you click on the **Upload** button, you will then be asked to navigate to the file that contains the picture. When you click on the **Webcam** button the application will attempt to start your webcam and allow you to capture a photo. Note: often when you try to start your webcam from within a browser application, you will get a prompt on the page somewhere asking you if you want to allow the action.

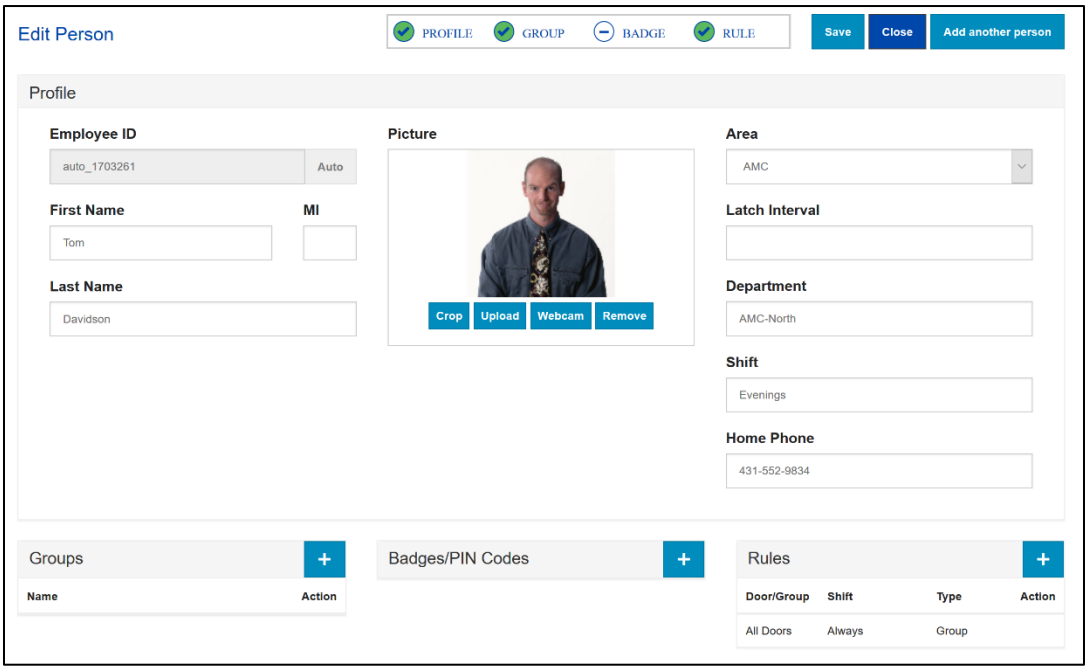
Area is the location that you want to assign the person to. This uses of area should not be confused as having control of where this person will be able to have access within your organizations doors. The assignment of an area will only affect which Users of Cobalt will have the ability to configure this person.

Latch Interval is how long you want the door to remain unlocked when this person is admitted through a door. This is an override to the doors default setting.

Title is a user defined field. Cobalt' Thick-Client supports 20 user defined fields and the Web-app utilizes the first three. In our example, the 1st user defined field's label was set to the value "Department".

Clicking on the Save button will commit all of your data entry and:

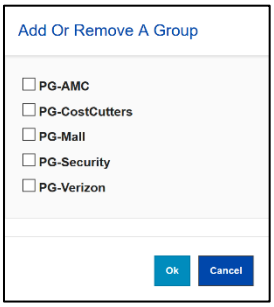
- Updates the progress indicator
- Puts a “Changes Saved!” banner on the page
- Displays the options to add Groups, Badges/PIN codes and Rules
- Cobalt’s Automatic Actions
    - Note that Tom was automatically added to a People Group named “Everyone”.
    - “Everyone” already has a business rule defined, so Tom inherited that business rule
    - So, the progress indicator shows 3 green indicators, but Tom still needs a Badge



Assign to a Group

The user needs to be assigned to another group, and so we will click on the + sign next to the Groups content area : Groups +.

The following pop-up box will appear.

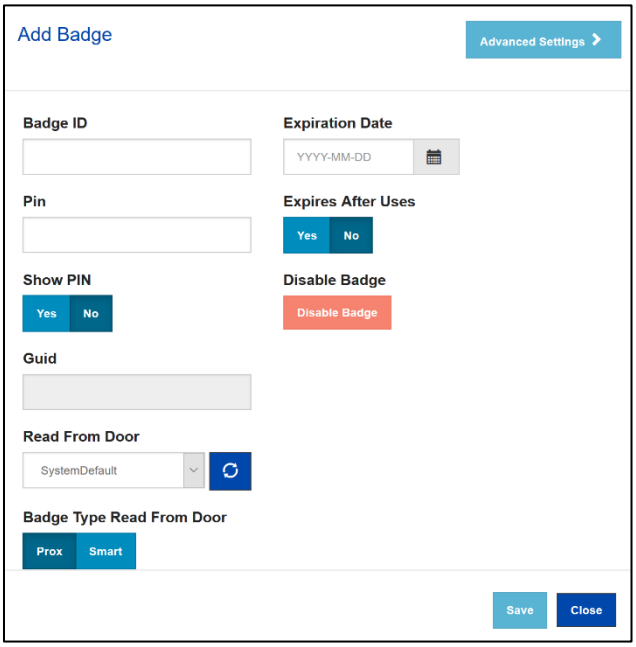


Which allows you to select one or more groups to assign this person to. When you have selected all of the groups, click the OK button to save your changes. Note, it is not necessary to click on the Save button located next to the progress indicator.

Assign a Credential

The next step is to add a Badge which we do by clicking on the + sign next to the Badges/PIN Codes content area: Badges/PIN Codes +

Adding a badge or PIN code to the system is simply either typing in the information requested on the page or reading the badge number from any door attached to your system, preferably an enrollment reader which is sitting right on your desk!



Badge ID is a unique identifier from a valid RFID badge. A badge ID can only be assigned to a single user, duplicates are not allowed.

Expiration Date is an *optional* entry which signifies the date on which the badge will no longer be valid. You can click on the little icon to bring up a calendar.

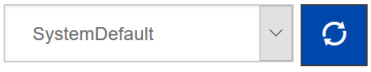
PIN is a unique number that the person can type into a Blue Access Keypad equipped reader. PIN codes can only be assigned to a single user, duplicates are not allowed.

Expires After Uses is used to limit the number of times a badge ID or PIN code can be used before it is disabled. If you set this value at 5, then the credential will only be valid for 5 times and then it will no longer be accepted.

Guid is a *read-only* field and is automatically filled in when the "Read Badge From Door" options described below is used. The GUID is a unique character string read from the badge IF the badge is a SmartCard. If the badge is a PROX badge, then the GUID represents all of the data that was read from the PROX card.

Disable Badge is a short cut method for disabling a badge. It is preferable to disable a badge rather than delete it because it allows you to track if that badge is ever presented to one of your readers in the future. When you click on Disable Badge the expiration date is filled in with today's date which immediately invalidates the credential.

Read Badge From Door allows you to read the badge ID from one of your attached doors. To utilize this feature, you must complete the following steps:

1) Select a door from the drop down box 

, make sure it is an active door on your system,
2) Present the new credential to this door (System is looking for a "rejected credential")
3) Then click the option.

   Cobalt looks in the History table for the last rejected credential that was presented at the selected door within the last 5 minutes. *Note: It is not possible to type in the badge ID for a SmartCard because they include characters that do not appear on any keyboard, you must use the "Read Badge From Door" option to enroll SmartCard credentials.*

Badge type Read From Door is used in conjunction with the "Read Badge From Door" option. By selecting either

or

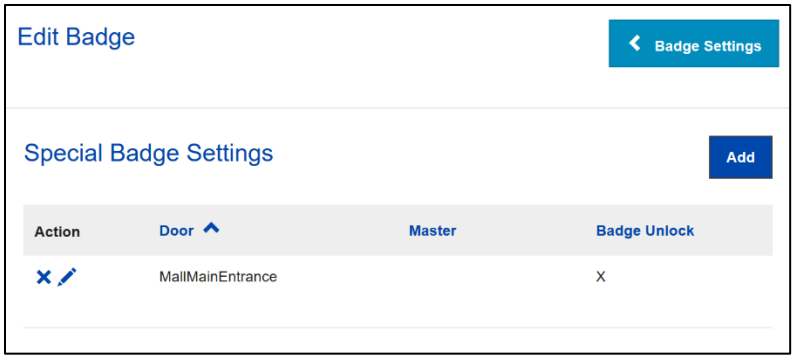
you are informing Cobalt the type of credential that you are reading in from the door. If you have

selected, then the Badge ID field must be a value greater than 0 and the application will fill it in automatically. If you have

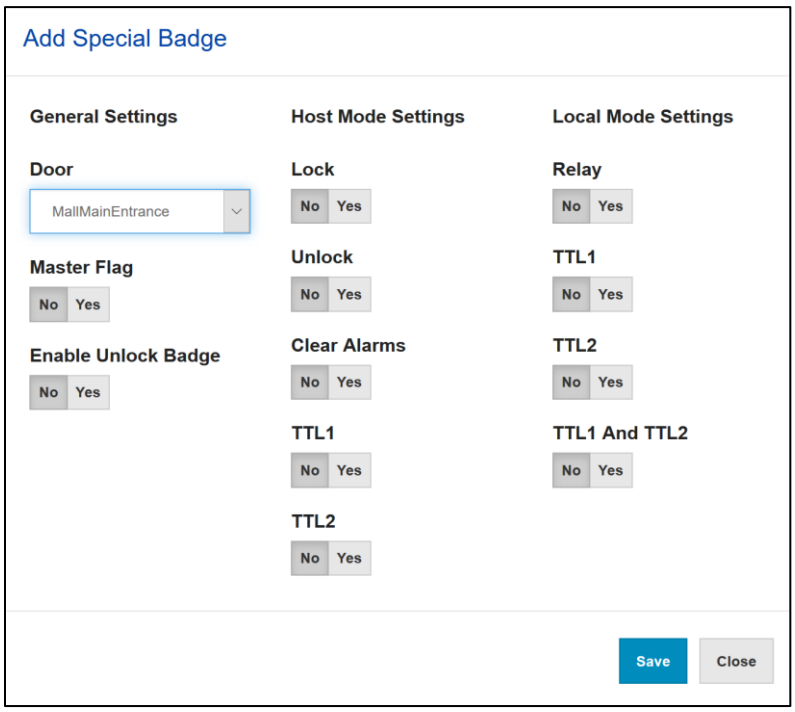
selected, then the Badge ID field can be any value 0 or higher.

Badge Advanced Setting is used to assign special capabilities to a badge. The badge must have been saved before using this feature. Click on the

button, and that badge's current list of special capabilities is displayed.



Click on the Add button and the capabilities selection window appears.



Select the options that should be assigned to this badge. Only two of these options are used very often, those are:

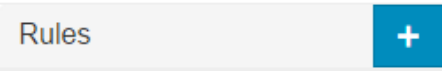
Master Flag

Defines that this badge is allowed thru the door, while the door is in the LockDown state.

Enable Unlock Badge

Defines that this badge can place the door into the "Unlock" status, when the door has an active Unlock-with-Badge rule defined.

The next step is to add a Rule which we do by clicking on the + sign next to the Rules content area:

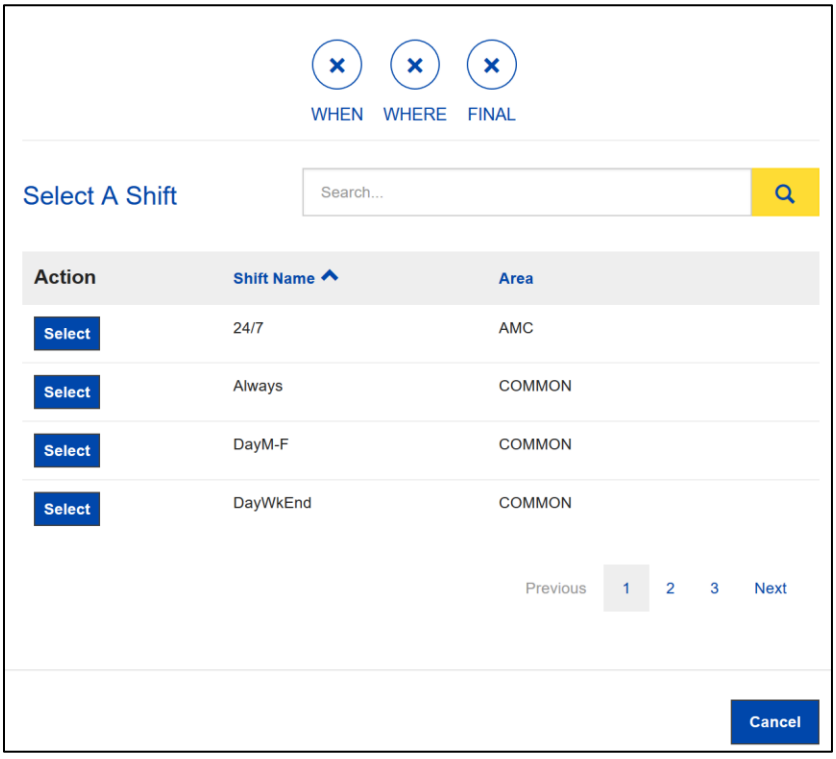


Adding Rules is one of the easier processes in Cobalt because you are literally walked through the 3-step process.

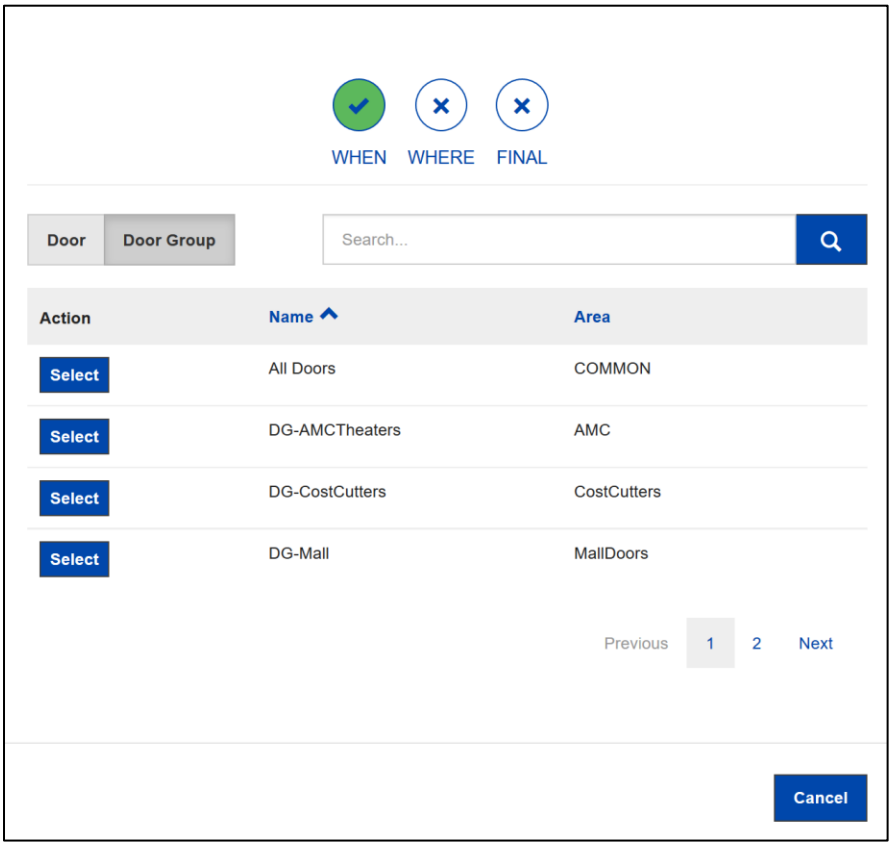
Let's do a quick review of rules in general. Remember earlier we stated that the preferred method of assigning rules was using the Group Rules which we have not covered yet in this document. **When you are adding rules through the People page, you are adding individual rules opposed to group rules**. It is a perfectly valid way of setting up your system but it is not advised. We are going to complete the example of setting up this individual rule and then quickly cover the how to assign a Group rule using this same page.

Since a rule, either group or individual, must know when and where it is active, you must select a shift and door during the assignment of an individual rule.

Pick a Shift by clicking on the Select button next to the desired shift.

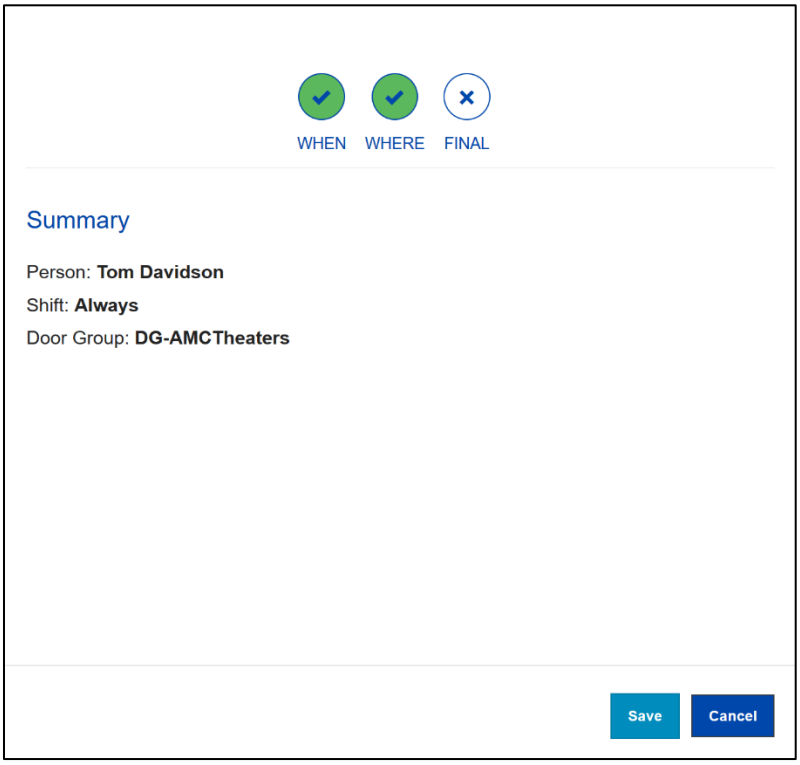


You must now either pick a door or door group. Door groups are the preferred method of configuring your system. To select a door group instead of a door, click on Door Group.

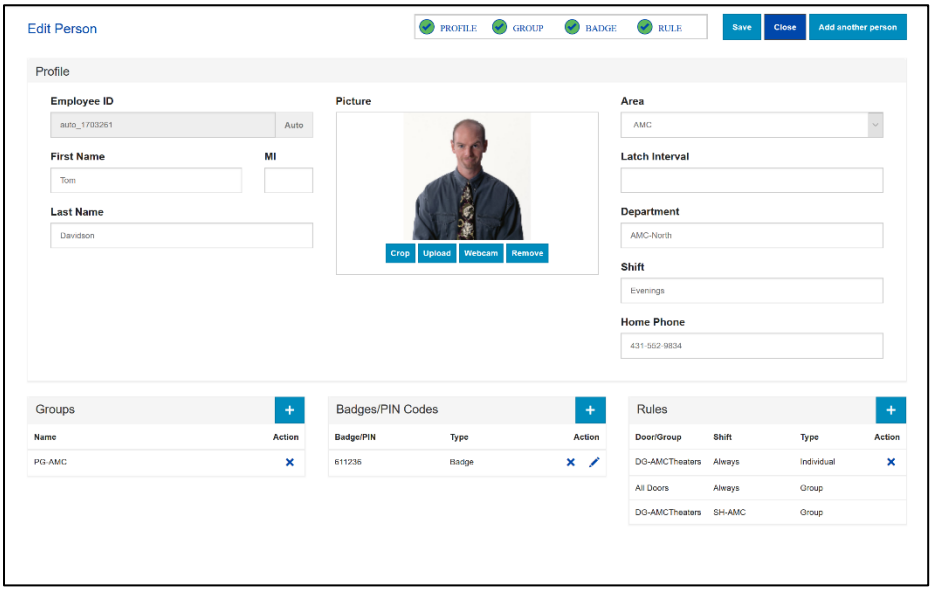


Now select a door group by clicking on the Select button next to the desired door group.

You will now be presented with a summary page. In this case the summary says that the credential associated with Tom Davidson will be permitted through all the doors in the AMCs door group during the day and times defined in the AMC shift. Click the Save button to complete the task.



The progress indicator shows that we have completed all 4 of the steps required to add a person to the system. We can add or remove Groups, Badges/PIN Codes or Rules by selecting the appropriate actions on the page.

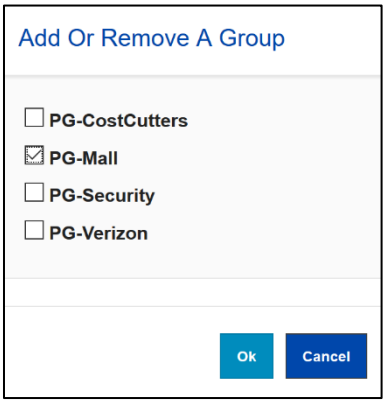


As promised, we are now going to cover assigning a rule that has been previously been pre-configured in the Group Rules section that we have yet to cover.

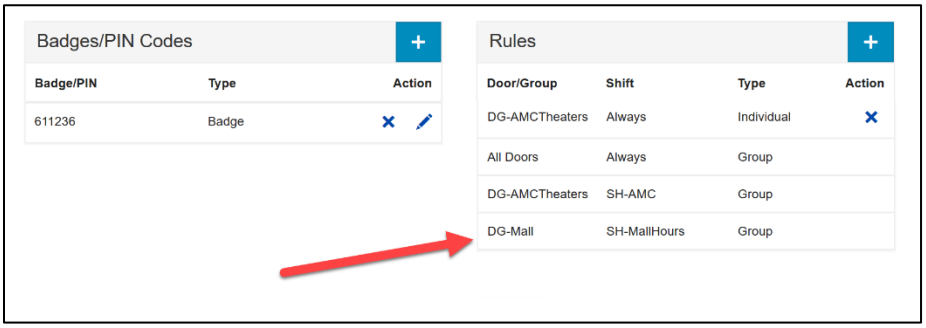
We can see from our example thus far that Tom Davidson now has a valid badge to get into all the doors at the interior store AMCTheaters; however, Tom does not have access to any of the Mall entrance doors. Let's just take for granted right now that there has been a group rule set up that permits entry at all the mall entrance doors during the mall hours and that rule has been assigned to the People Group "MallDoors".

We click on the + sign on the Groups + content option.

We then select the PG-Mall group and click the OK button.



When we are returned to the People page, we will see that any predefined rules associated with the People Group PG-Mall will have been automatically added to our Rules list as seen below. We call this inheriting rules. Note that the "Type" of rule added is a "Group" one.

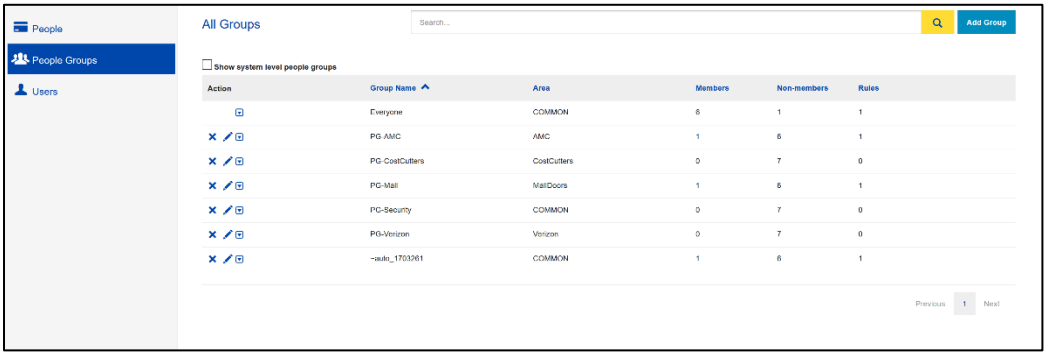


Whew, that was a lot to cover and we only finished one page! While this is true, we have covered a lot of ground now and many of the other pages are either simple to cover or begin to look familiar as you work through them.

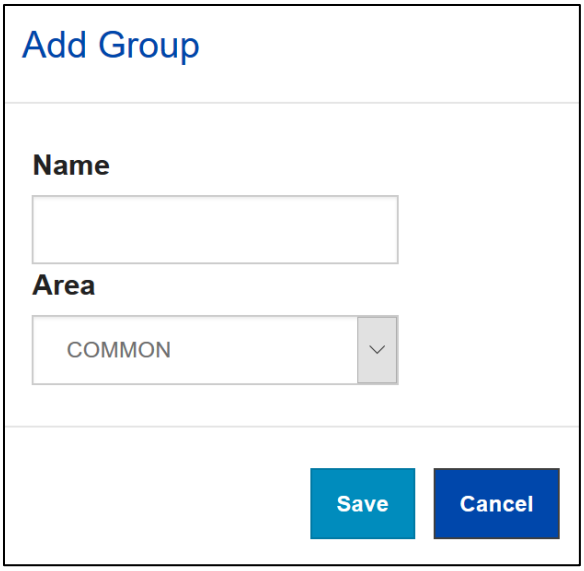
People Groups

Excuse us for taking another shot at stressing the importance of using People Groups. We think it is a simple enough concept to get that people can belong to one or more groups, but it sometimes difficult for users to grasp that rules should be assigned to these people groups and not individuals, it will really make your ACS management task a lot easier, we promise!

Adding a new People Group is one of the faster tasks in Cobalt, you start this process by navigating to the People Groups page and selecting the Add Group button.



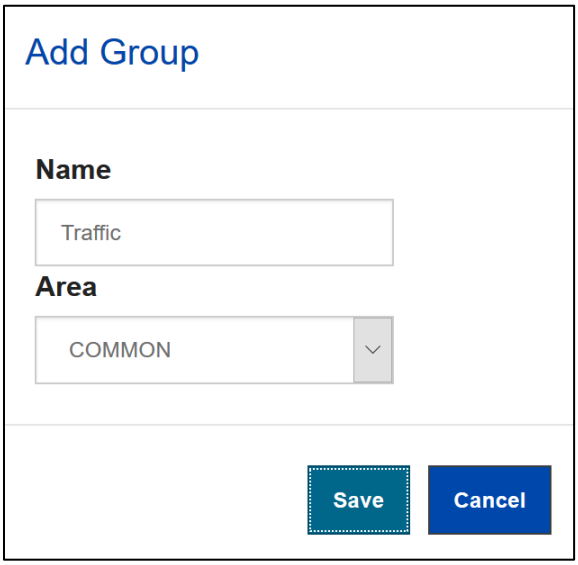
Since we are using a fictitious shopping mall in this User's guide, you will notice that we have some People Groups already defined. We could edit or delete them by selecting the appropriate action, but we are going to add a new one instead.



Name is any text field that makes sense to you.

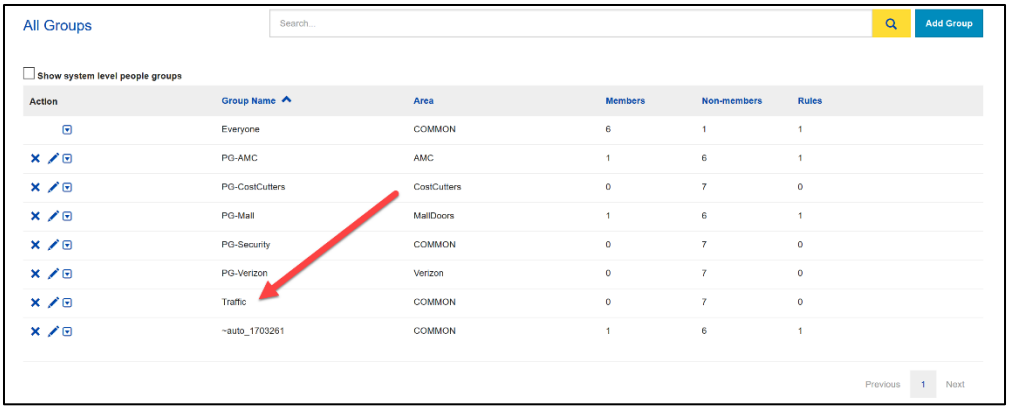
Area is one of the defined control areas that can be configured.

For our example, we are going to set up a new People Group named “Traffic” and assign the control area of “COMMON.”



Once the data is entered, click the

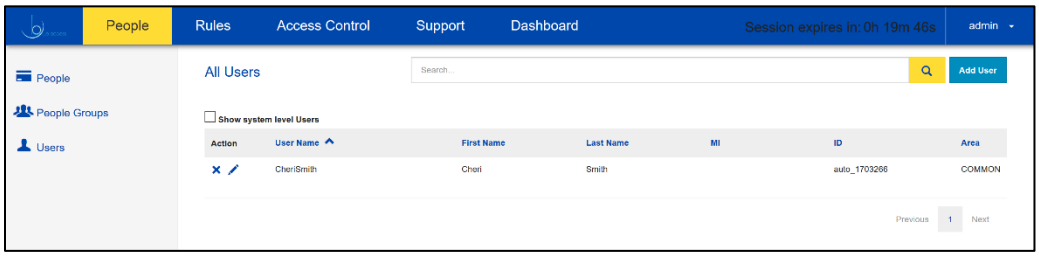
button. Notice that the new People Group shows up in the work content area.



Were we right, this one was easy!

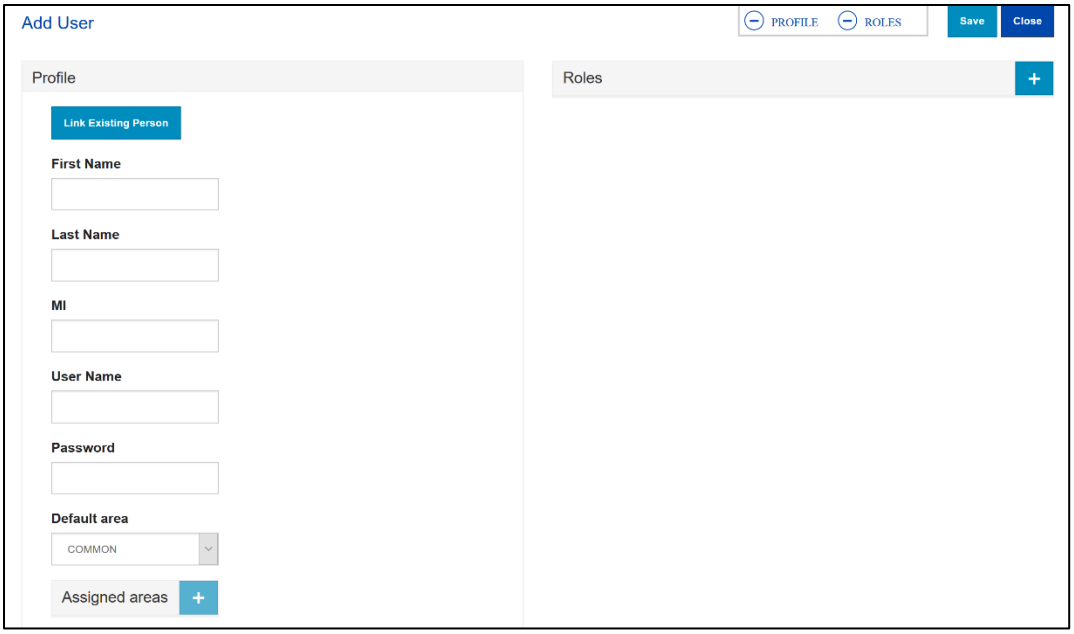
Users

Recall that a user is someone that can login to Cobalt and that a user may also be a credential holder. There are two steps for adding a user, you set up their basic profile of Name, password and area and then you assign them 'Roles'. Roles grants a user accessibility to features and functions within Cobalt. We will discuss the roles in greater detail as we work through the example of adding a new user. You start the process by selecting the Second Navigation of Users within the Primary Navigation of People.



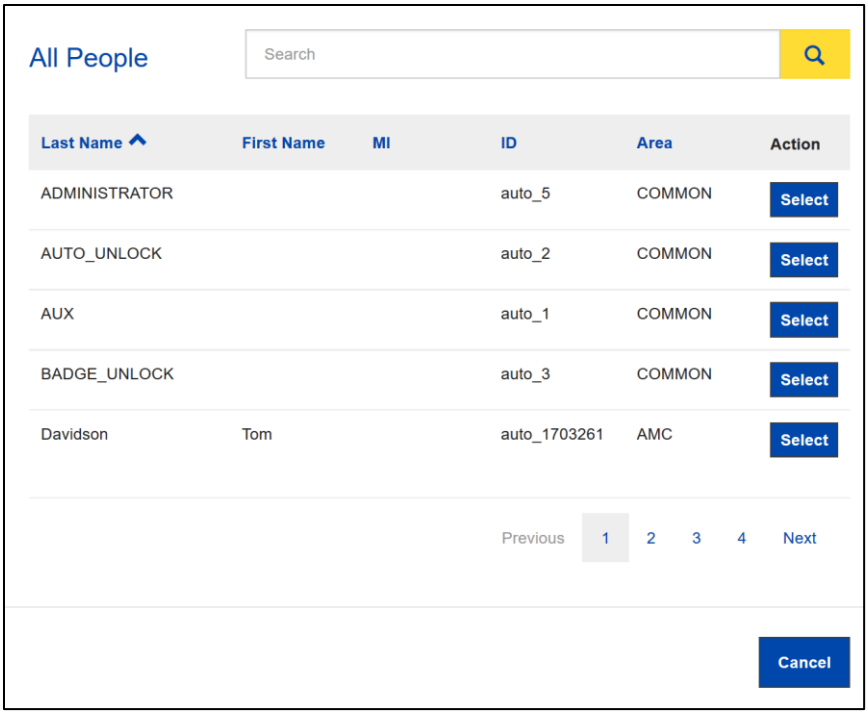
By now you probably already realize that to add a user, you will click on the **Add User** button within the work content area.

When the page is displayed, you were probably already expecting a progress indicator since we already told you there were 2 steps involved when setting up a new user, you configure the profile and then assign roles.



Link Existing Person is a way of selecting a new user by linking them to a Person that has already been entered into Cobalt. When you click on the "Link Existing Person" button, a new page is displayed that allows you to find the Person that you want to link to. Notice that this page conforms to all the same navigation and ease of use features that all other pages utilize.

To be really clear on the linking option. What you are doing is saying "okay, I have a person in the organization that currently is set up with credentials to get in and out of my doors, now I want that same person to be able to log into Cobalt and control a section of the application." If that's what you were saying, then you've come a long way in your understanding of the system application.



To link to an existing person from the list displayed, click on the Select button that corresponds to the person. When you do this, the appropriate field on the add user page will auto populate.

First name, Last name, and Password are all exactly what you expect them to be. Cobalt does not impose any restriction on the password field.

Username identifies the user within the Cobalt application, the name will auto fill as you enter the first and last name. There is no need for you to modify this field.

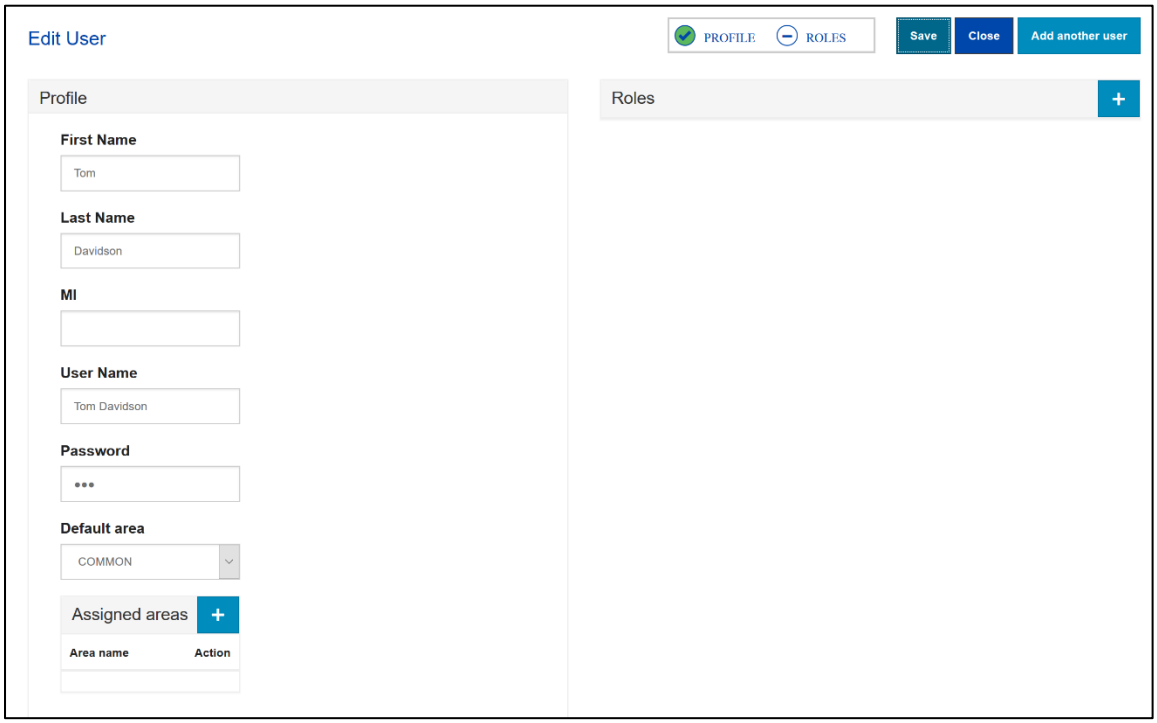
Default Area is the section(s) of the Cobalt application that you want this user to belong to and which restricts who can change that user's configuration.

And then the user is assigned one or more areas, which they can configure and/or control.

In this example, we are assigning the person to the Area CostCutters which means their record can only be modified by a CostCutter User. And they will be authorized to monitor the CostCuttter and AMC areas, meaning they can configure and/or control both areas.

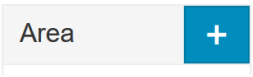
When a user logs on to Cobalt and they navigate around the system, they will only see information in the content area of the pages that match their monitored area(s).

Clicking on Save button will commit your information, update the progress bar and lead you to the next step of assigning roles.

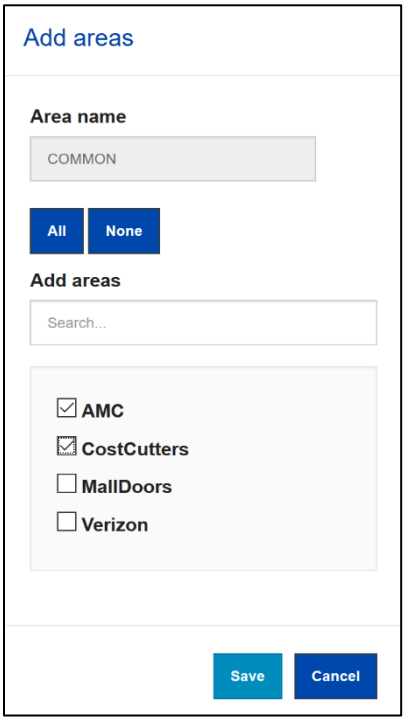


Assign Authorized Areas to Monitor

You being the process of assigning areas to monitor by clicking on the + sign on the



content option.



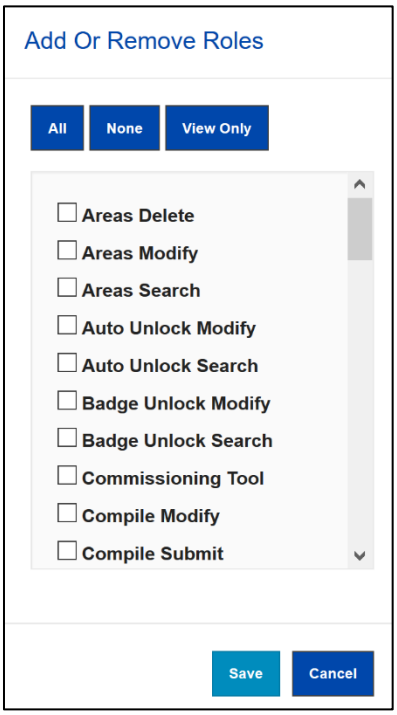
In our example, we will select the AMC and CostCutters options, and then click the Save button.

Roles Security

You begin the process of assigning Roles to the user by clicking on the + sign on the Roles + content option.

What is a user Role? A user role is something that you want the user to be able to do within the Cobalt application. An example will probably get the point across the easiest way. If you look at the list below, you will see that the top three roles you can assign to the user are People Search, People View Detail and People Modify. If you do not assign the role, then the user will not be able to do any of these 3 things.

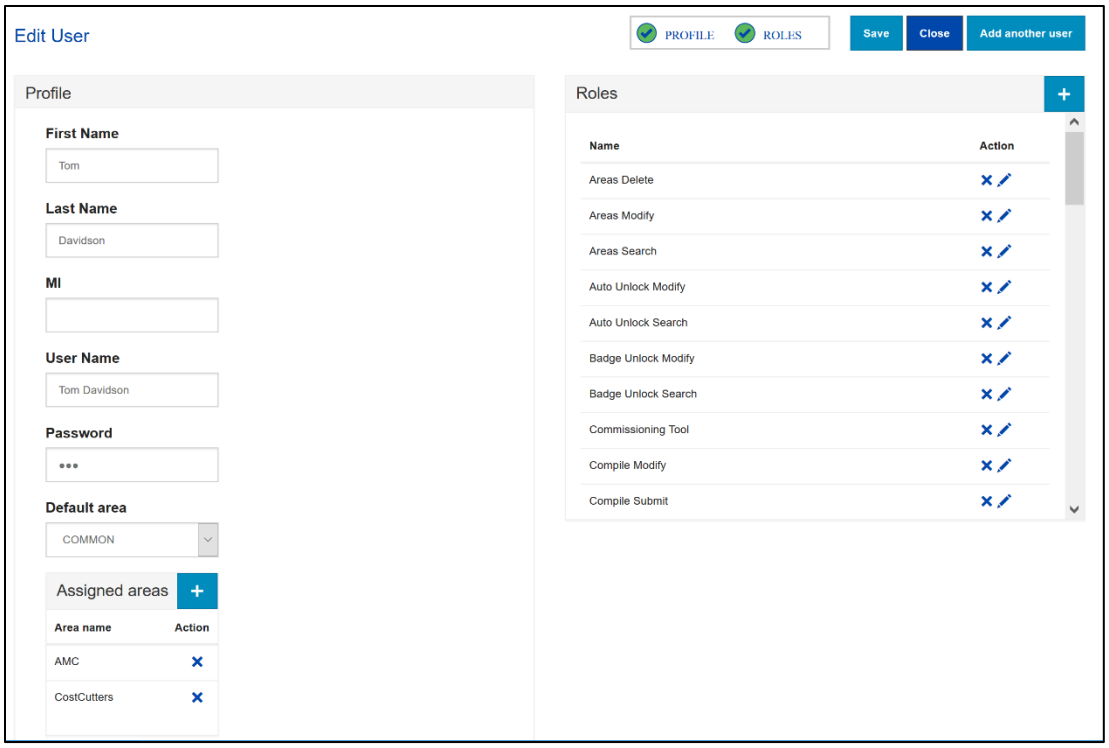
The buttons at the top, All None View Only are just short cut methods for selecting the roles. If you click on the All button, the user will be assigned all the roles; if you click on the None button, any assigned roles will be removed; if you click on the View Only button, the user will only be assigned the roles that allow them to view data, not update it.



If you do not want to use one of the shortcut buttons, you can select individual roles from the list.

In our example, we will click on the All button and then click the Save button.

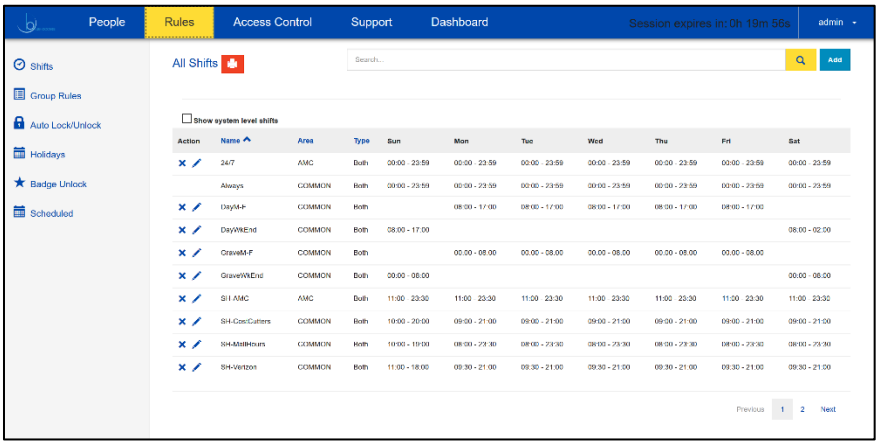
The user's completed record is shown below.



You have now finished reading all there is to read on the Primary Navigation menu option of People. You should now understand the difference between a Person and a User, you should understand how People Groups and People correlate to one another, and you should be able to add a Person to the system and grant them access to a door or group of doors. Ideally you would also understand that although you can add individual rules to each person, it is far better to create Group Rules and assign People to groups that have pre-defined rules.

Primary Navigation -- Rules

When you select the Primary Navigation Rules option, you will notice that the Secondary Navigation option has 6 items: Shifts, Group Rules, Auto Lock/Unlock, Holidays, Badge Unlock and Scheduled.

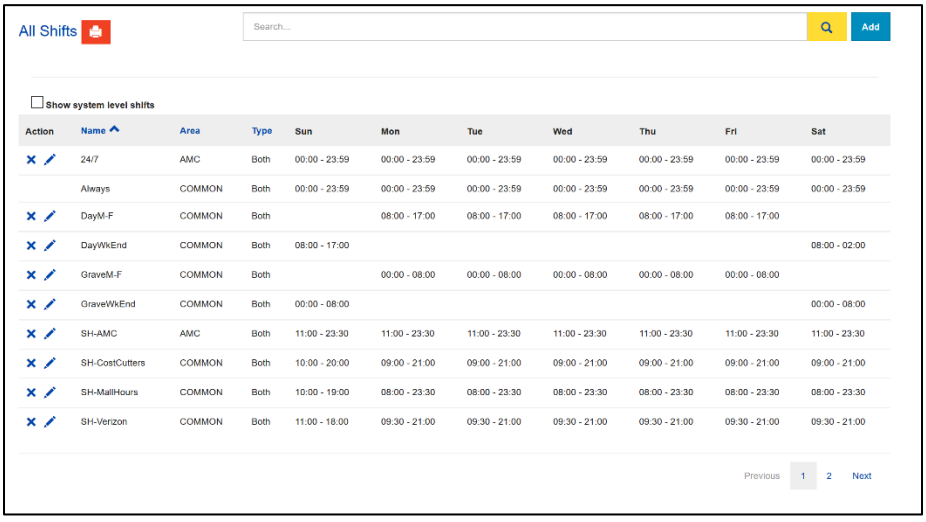


Let's take a closer look at each of the Secondary Navigation options under the Primary Navigation Rules.

Shifts

Shifts is one of the three building blocks for creating rules, the other two building blocks are People (or People Groups) and Doors (or Door Groups).

A shift defines what hours of a week the rule will be active for.

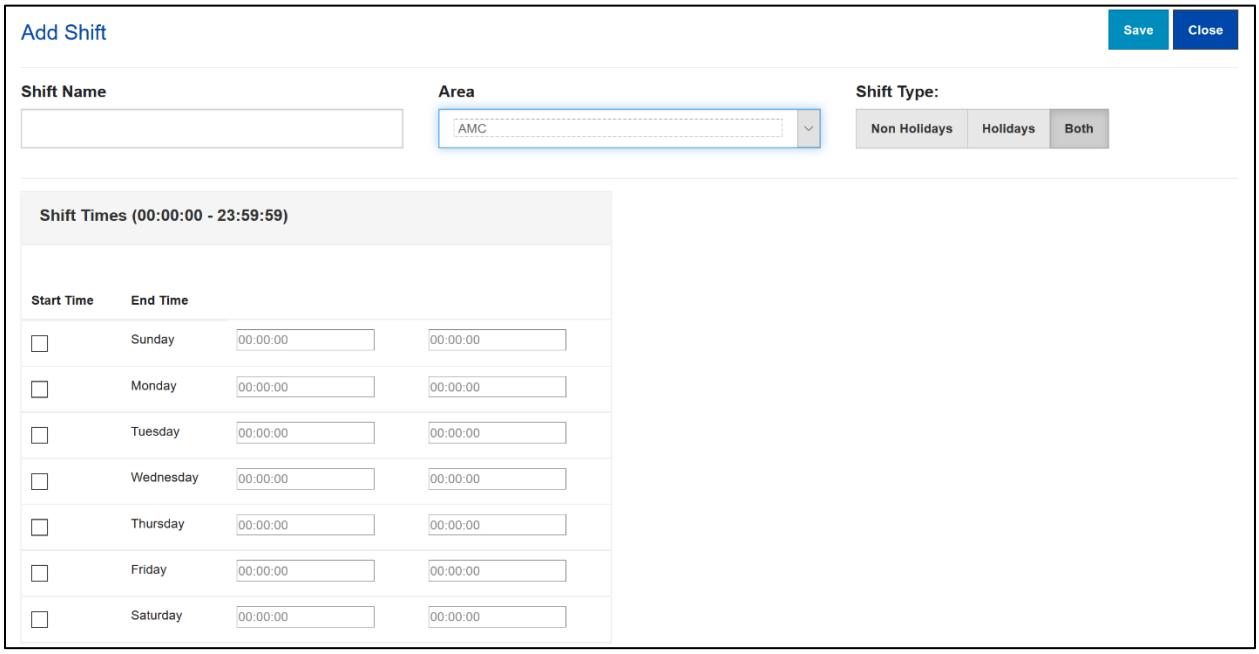


Action	Name	Area	Type	Sun	Mon	Tue	Wed	Thu	Fri	Sat
✕ ✎	24/7	AMC	Both	00:00 - 23:59	00:00 - 23:59	00:00 - 23:59	00:00 - 23:59	00:00 - 23:59	00:00 - 23:59	00:00 - 23:59
	Always	COMMON	Both	00:00 - 23:59	00:00 - 23:59	00:00 - 23:59	00:00 - 23:59	00:00 - 23:59	00:00 - 23:59	00:00 - 23:59
✕ ✎	DayM-F	COMMON	Both		08:00 - 17:00	08:00 - 17:00	08:00 - 17:00	08:00 - 17:00	08:00 - 17:00	
✕ ✎	DayWkEnd	COMMON	Both	08:00 - 17:00						08:00 - 02:00
✕ ✎	GraveM-F	COMMON	Both		00:00 - 08:00	00:00 - 08:00	00:00 - 08:00	00:00 - 08:00	00:00 - 08:00	
✕ ✎	GraveWkEnd	COMMON	Both	00:00 - 08:00						00:00 - 08:00
✕ ✎	SH-AMC	AMC	Both	11:00 - 23:30	11:00 - 23:30	11:00 - 23:30	11:00 - 23:30	11:00 - 23:30	11:00 - 23:30	11:00 - 23:30
✕ ✎	SH-CostCutters	COMMON	Both	10:00 - 20:00	09:00 - 21:00	09:00 - 21:00	09:00 - 21:00	09:00 - 21:00	09:00 - 21:00	09:00 - 21:00
✕ ✎	SH-MallHours	COMMON	Both	10:00 - 19:00	08:00 - 23:30	08:00 - 23:30	08:00 - 23:30	08:00 - 23:30	08:00 - 23:30	08:00 - 23:30
✕ ✎	SH-Verizon	COMMON	Both	11:00 - 18:00	09:30 - 21:00	09:30 - 21:00	09:30 - 21:00	09:30 - 21:00	09:30 - 21:00	09:30 - 21:00

Previous 1 2 Next

Cobalt predefines a few default shifts. "Always" is valid 24x7. This shift cannot be modified. DayM-F, SwingM-F and GraveM-F can be updated to reflect your business' workday schedules. DayWkEnd, SwingWkEnd, and GraveWkEnd can be updated to reflect your business' weekend schedules.

When adding a shift, you start this process by navigating to the Shifts page and selecting the Add Shift button.



Shift Name is any name that you want to create. It is useful later on when building rules to use meaningful names like: 24/7 to indicate the rule would be active 24 hours per day, 7 days per week. Other suggestions are names like Business or Weekends.

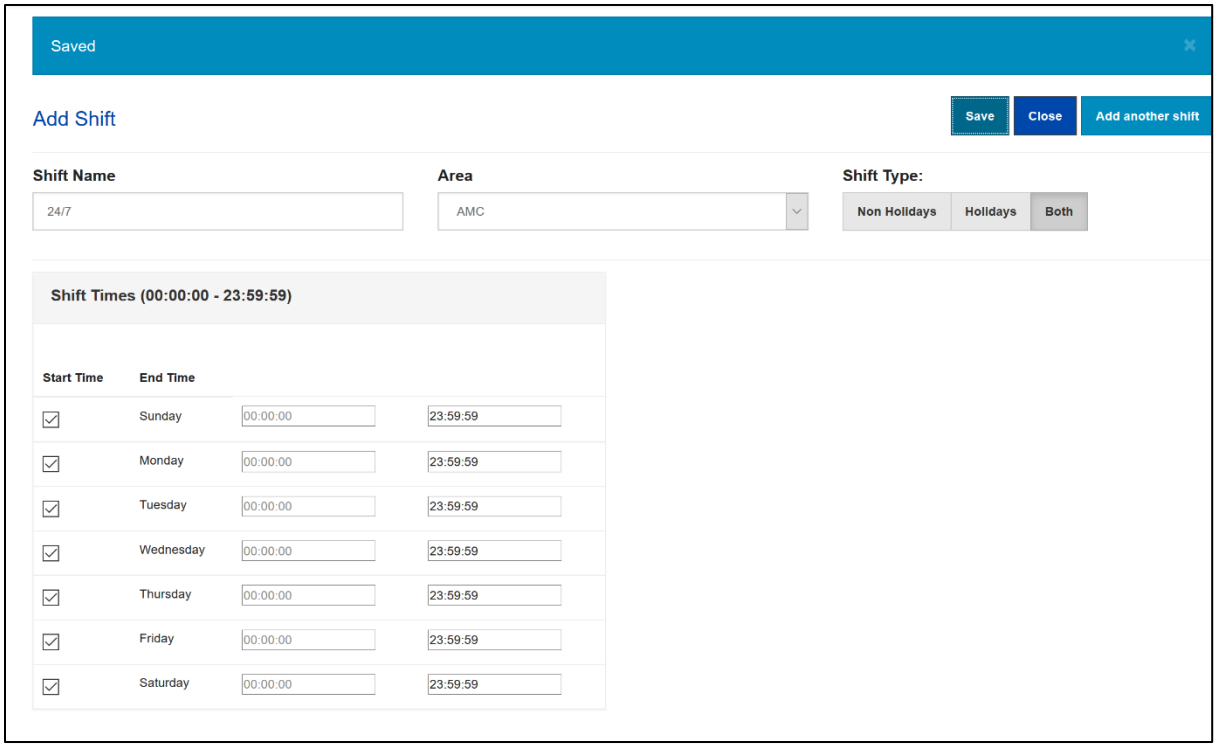
Area is the location that you want to assign the shift to. The assignment of the shift to an area will mean that only Users that are managing that area will have the ability to configure or use this shift.

Shift Type is one of three options, Non-Holidays, Holidays or Both. This means you get to decide if the shift you are defining is active Holidays or not, or it is active for both. The use of this field is as follows. Let's assume that on some holidays you want the system to behave differently than you do on other days, perhaps you don't want to let anyone in the doors at all. You can accomplish this by setting up the shift to be for Non-Holidays only, then putting entries in the Holiday list which we have not discussed yet.

Shift Times is a list of all the 7 days in a week, and the hours of the day that you want the shift to be active for. You select the day and then fill in the times. All the times use the 24-hour clock, thus any time after 12 Noon you add 12 hours to when filling in the time field (2:00 in the afternoon is represented by 2:00 + 12 hours which comes to a time of 14:00). If you want a shift to be active 24 hours per day, then you do not fill in the start time, you only fill in the ending time with the value of 23:59:59.

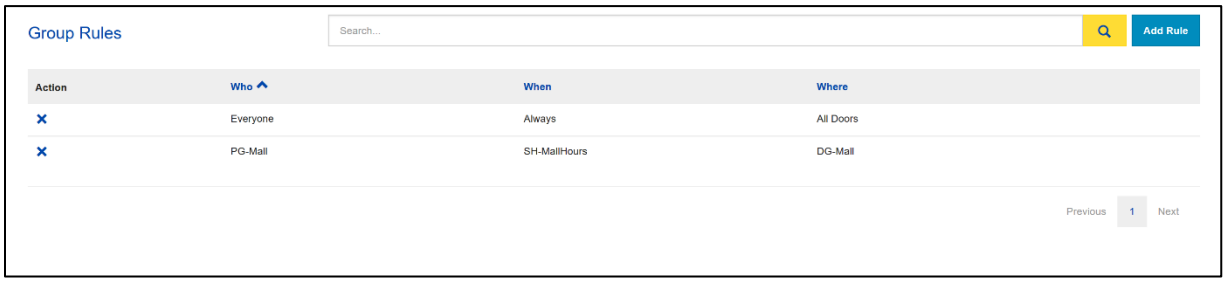
As an aide to entering the start and end times for a shift, the application will auto fill the time field with whatever is in the previous field. For example, suppose we fill in 8:00 in the start field for Monday, when we click on the start field for Tuesday, the application will automatically fill in 8:00.

For our example, we have added a shift of 24/7, selected all 7 days and filled in the ending time of 23:59:59 and then clicked the button.



Group Rules

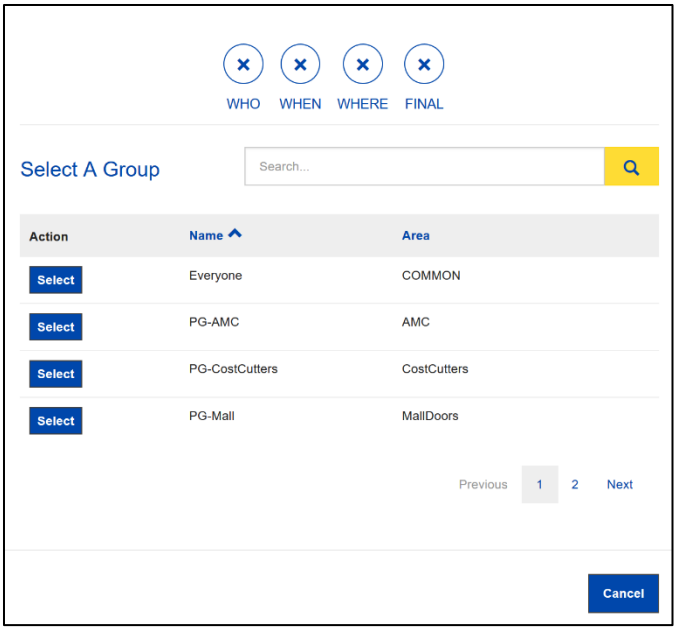
A Group Rule is a rule that has been assigned to a group of people and doors for a specific shift. If you take the time to set up Group Rules, then the process of adding People to your system will be much easier to set up and maintain.



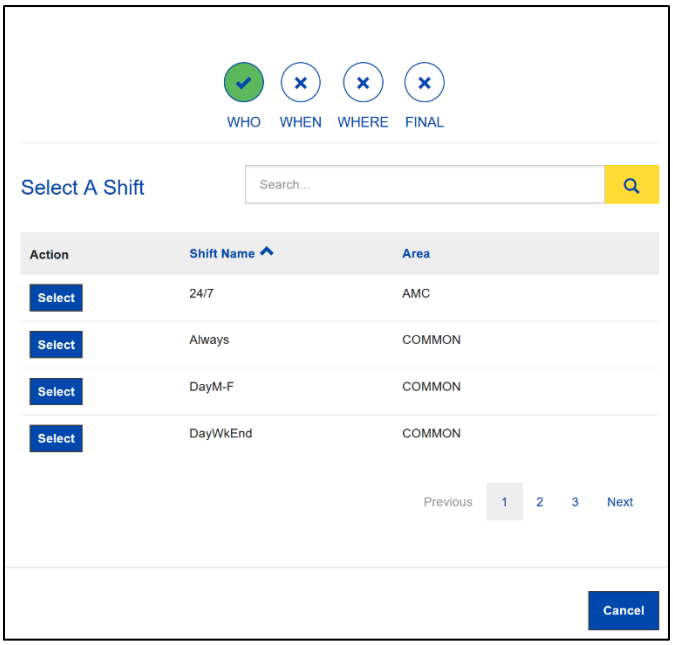
Cobalt predefines a default Group Rule. The rule states that “Everyone” is “Always” allowed thru “All doors”. This rule can be changed or deleted.

You start the process of adding a Group Rule by navigating to the Group Rules page and selecting the Add Rule button. Immediately you will recognize that adding a Group Rule will require 4 steps, selecting Who, When, Where and then reviewing Final step.

Who, this is the People Group that you want to pre-define a rule for, this People Group must have been previously set up by you. You select the group by clicking on the corresponding Select button. In our example, we selected the PG-AMC, which is the People Group for the AMC theaters.



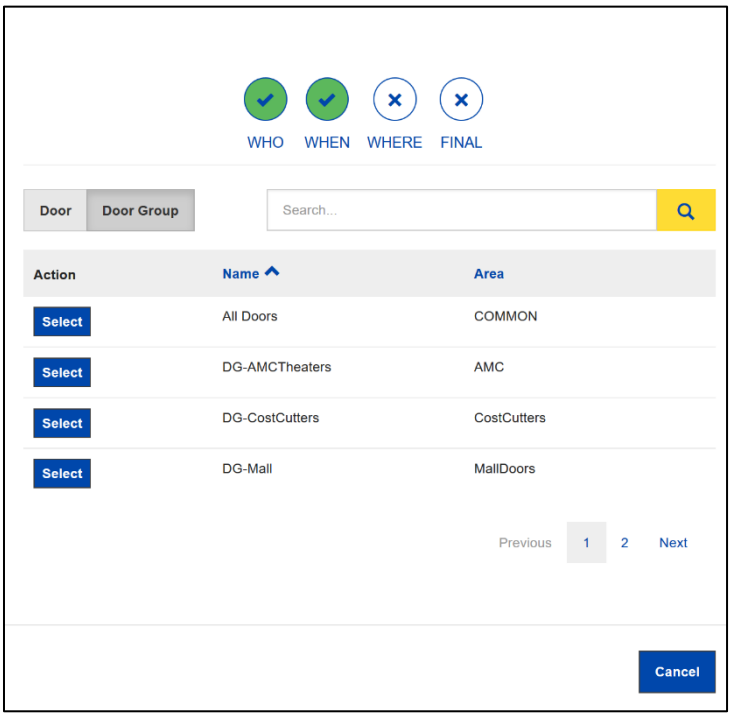
The application modified the progress bar and presents the user with the next step which is selecting **When** the rule will be active. The When selection is a list of all the Shifts that you have defined. You can see that if you are careful with your naming conventions, then locating the shift for the AMC Theater (SH-AMC) is easy and then click on the matching Select button.



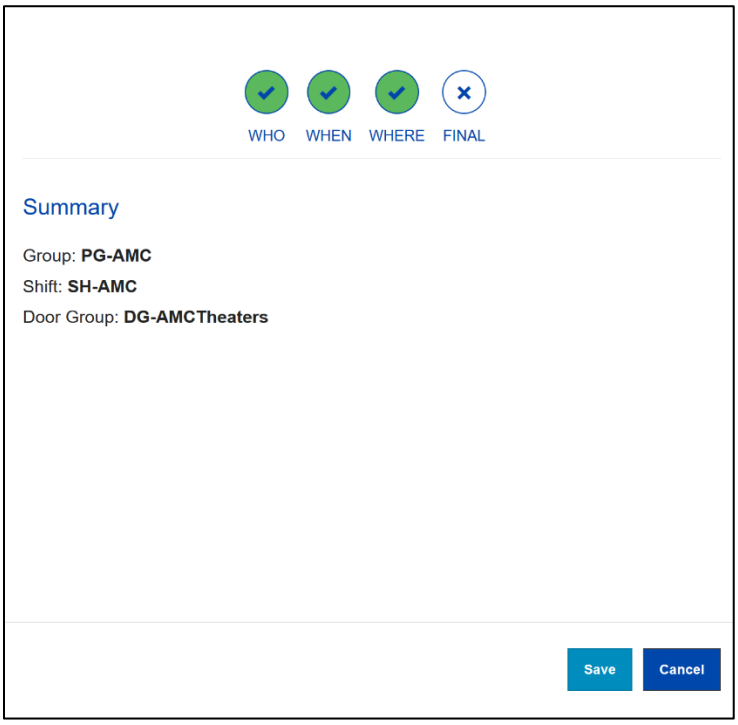
The progress bar tells us that we are on step 3 and that we need to pick **Where** the rule is applied, this is either a single door or group of doors. Two points, it is easier to work with groups of doors and if you name those groups meaningfully, then it makes the selection pretty straightforward.

To get to the Door Group list, you click on the Door Group button

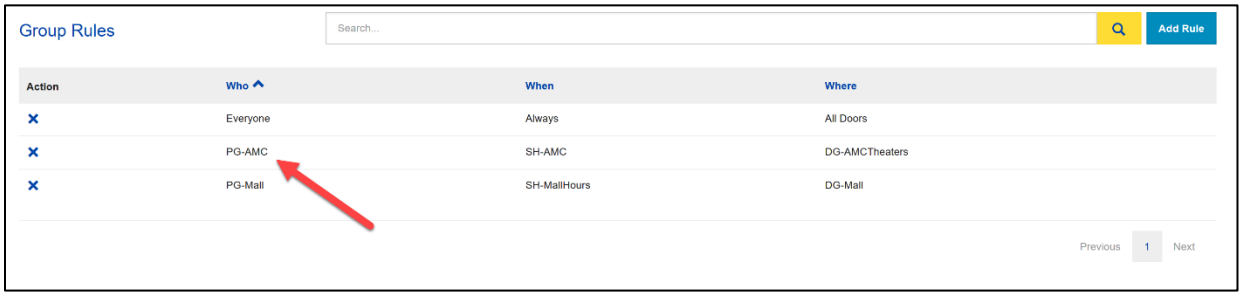
We are now ready to select the correct door group for our example, which is DG-AMCTheater. This means that the rule we are setting up will be applied to all of the doors in the AMC Theater door group.



We are now on the last step for defining a rule, it is a summary page of the rule we are about to commit. This summary page can be read as the rule is for all of the people in the group PG-AMC, during the days and times defined in the shift SH-MC and it applies to all the doors in the door group DG-AMC-Theaters.



You click the Save button to complete this process.

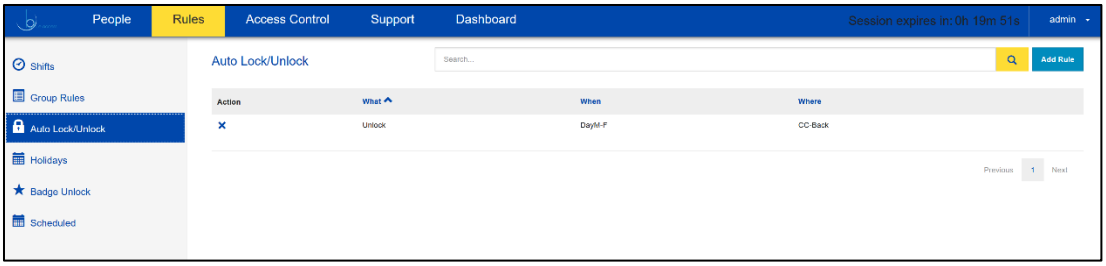


Congratulations, you now understand how to set up a Group rule and you are well on your way to being able to configure the system.

Auto Lock/Unlock

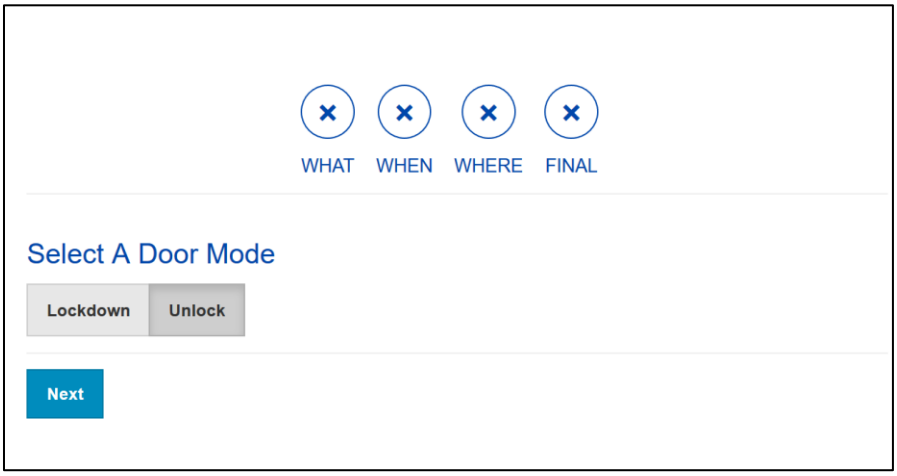
An Auto Lock/Unlock is another type of Rule which is assigned to a group of people and doors for a specific shift. The Auto Lock/Unlock has a special purpose which is to cause a door or group of doors to automatically either lock or unlock during a defined shift.

A good example of when this is used is in a school setting or the main lobby of a multi-tenant building. In either of these two cases it is often true that the door must unlock at the beginning of the day and then relock at the end of the day.



We are going to take a different approach in this document to describe the Auto Lock/Unlock rule because it is so similar to the Group Rules that we just discussed. Rather than walk you through the entire process, we are only going to point out the where this rule differs from the Group Rule.

You start this process by navigating to the Auto Lock/Unlock page and selecting the Add Rule button. Immediately you will recognize that adding an Auto Lock/Unlock Rule will require 4 steps, selecting **What**, When, Where and then reviewing Final step. Step number one is the only difference between the Auto Lock/Unlock rule and the Group Rule. In a Group rule, step number one is Who, not what.



The two options available under the "what" step are either

which we hope has an intuitive meaning. Once you select one of these two options, the rest of the steps are identical to the Group Rules.

Badge Unlock

While we are on a roll discussing rules, we are going to pass by the setting up of Holidays which is the next item in the Secondary Navigation under the Primary Navigation of Rules. We will come back to the Holiday, we promise!

A Badge Unlock is another type of Rule which is assigned to a group of people and doors for a specific shift but it also requires the use of specific Badges

For review, if you desire to have a door remained unlocked for an entire shift once a valid badge has been presented, it requires two things to be true:

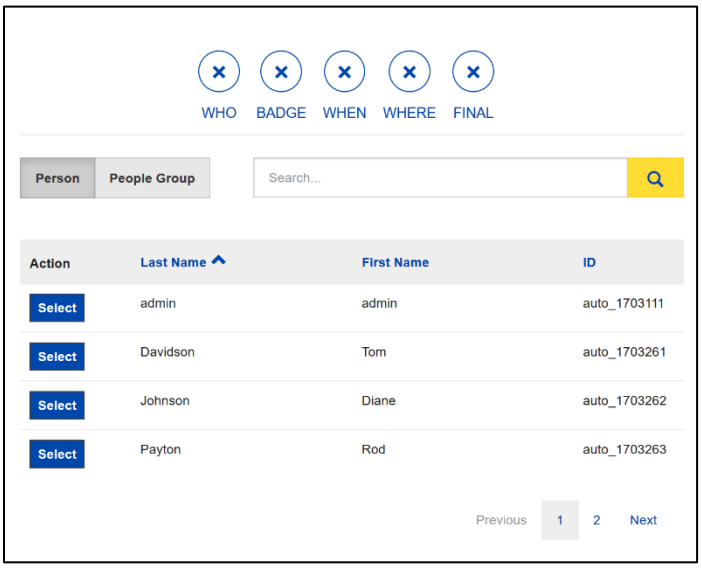
1. The badge must belong to a person who is associated with the BadgeUnlock rule. Either is the person identified with the rule, or belongs to the People-group who is identified with the rule. The Badge Unlock fulfills item #2 in the above list.

Notice, this differs from the Auto Unlock rule. AutoUnlock is only dependent on the associated start-time. AutoUnlock with Badge is dependent on the associated start-time AND a proper badge has been presented after the start-time.

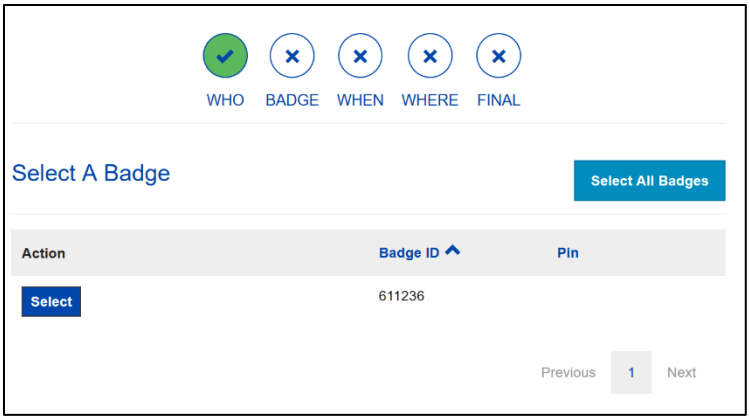
As we did when discussing the Auto Lock/Unlock, we are only going to point out the where this rule differs from the Group Rule.

You start this process by navigating to the Badge Unlock page and selecting the Add Rule button.

Immediately you will recognize that adding a Badge Unlock Rule will require 5 steps, selecting Person, Badge, Shift, Door and then reviewing Final step. The first two steps are the only differences between this rule and the Group Rule so we will only discuss them in detail. If you look at this rule, it will eventually come to you that if you are going to set up a badge rule, then you will need to know the badge number. The easiest way to select the correct badge is to first find the person that the badge belongs to. What great luck, that's exactly how this rule definition works.



You select the person by clicking on the **Select** button of the corresponding person.



You are immediately presented with a list of badges that belong to this person, you select the badge by clicking on the Select button corresponding to the correct badge.

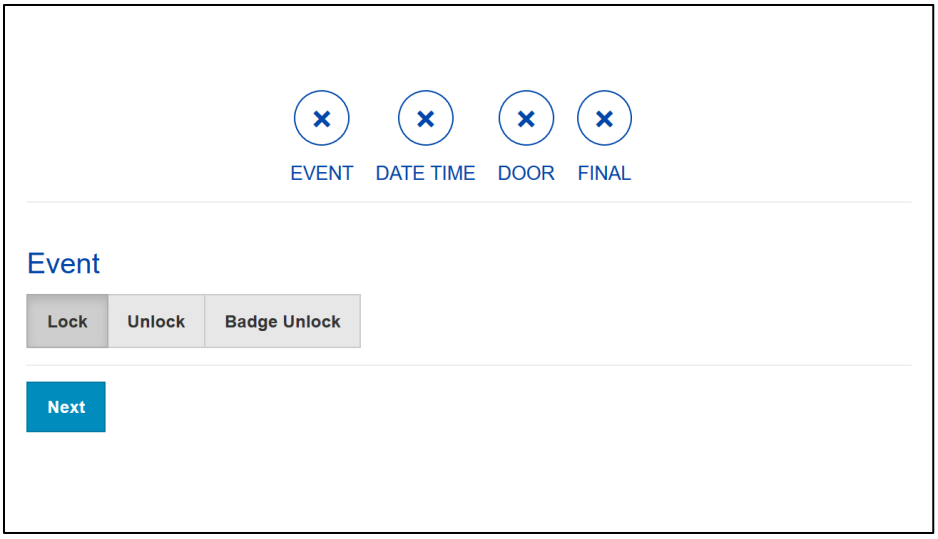
The rest of the steps follow along the same lines as adding a Group Rule and we think you will have no problem completing the Badge Unlock rule without further instructions from us. We believe in you!

You have now completed the section covering the rules that make up the system, the last two items on this Secondary Navigation to cover are the Holidays and Scheduled options.

Scheduled

A Scheduled event is something that you want to happen to your system on a specific date and time. Let's imagine that we are configuring a school system which is normally closed on week-ends; however, on a specific Saturday in November we know that the Gymnasium will be used by a local charity event and so we want to ensure that the back entrance to the Gym is open on that day between the hours of 10 A.M. and 3 P.M., a Scheduled event is just the ticket.

You start this process by navigating to the Scheduled page and selecting the Add Rule button.



As with the other rules, this one has multiple steps.

First you select the type of Event that you want to create, the options are Lock, Unlock and Badge Unlock. In our example, we want to create an unlock event but we could just as easily create a lock event if the need arises.

What the heck is the "Badge Unlock" special event? This is actually a more likely scenario. Do you really want to schedule an event in the future to unlock a door without knowing if anyone will actually be there? Probably not. Instead, you create a "Badge Unlock" special event which means that the door will unlock just as soon as someone presents a valid credential at the selected door. When a Badge Unlock rule is defined within Cobalt, the selected personnel's badges will automatically be configured with this special attribute.

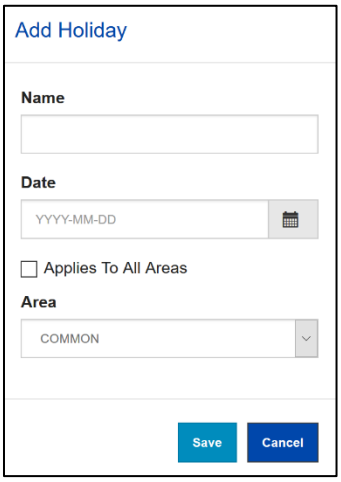
We have come to the last item in the Secondary Navigation under the Primary Navigation Rules, and it is definition of Holidays.

Holidays

Holidays allow you to configure your system so that the behavior of your doors is different on these days than other 'normal' days. We're going to use New Year's Day in our example because many businesses are closed on that day and do not want their doors to accidentally be unlocked while no one is in the building, some people might see that as a security breach.

How does the configured Holiday work? To understand that we'll need an example. In this example, we'll stipulate that the front door automatically **unlocks** M-F at precisely 9 A.M. As such, there is a Shift in the system that is called "Front Door M-F", this shift is set up to only be active on non-holidays (if you don't recall how to do this, reviewing the Shifts section in this document would be beneficial. Go on, we'll wait), however on New Year's Day, we do not want the door to unlock at all. Since the original shift was set up as a "non-holidays" only, when the system see that you have a holiday set up on New Year's, the rule to unlock the door will be ignored.

You start this process by navigating to the Holiday page and selecting the Add Holiday button.



As you might expect, there is not much to talk about creating a holiday.

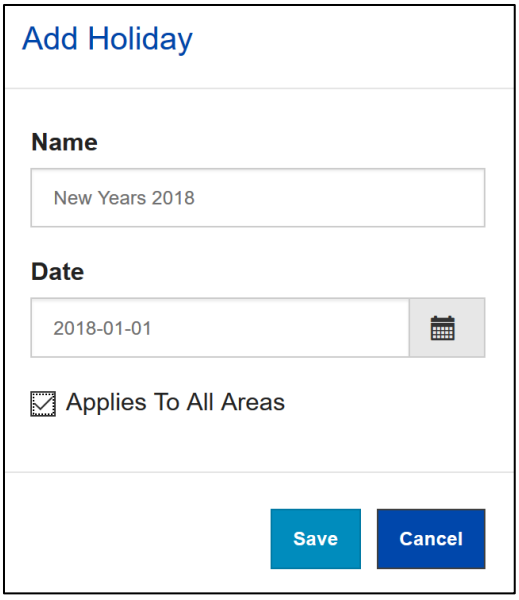
Name is any text you desire, no reason to be tricky here, if the holiday is New Years, just use the obvious.

Date is the exact date of the holiday, you can select the calendar icon to bring up a date picker.

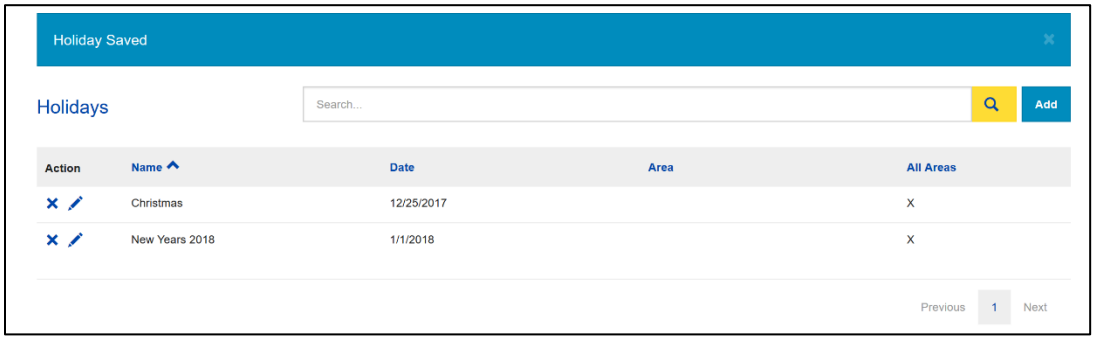
Applies To All Areas is a special feature that allows this holiday to be available to all shifts, no matter what area they have been assigned to. If you think about it, this makes sense since the holiday is probably universally observed across all the areas you have defined.

Area is the location that you want to assign the Holiday to. The assignment of the Holiday to an area will mean that only Users that are monitoring that area will have the ability to configure or use this Holiday and more importantly, Shifts defined in the system will not consider the day a holiday unless they are in the same area.

Generally speaking, it is better to use the "Applies To All Areas" option when configuring a Holiday then it is to assign the Holiday to a specific area. If you select the "Applies To All Areas", then the will show up if you attempt to type in the Area field indicating that it is not available.



You fill in the information and click the Save button, which is exactly what we did.

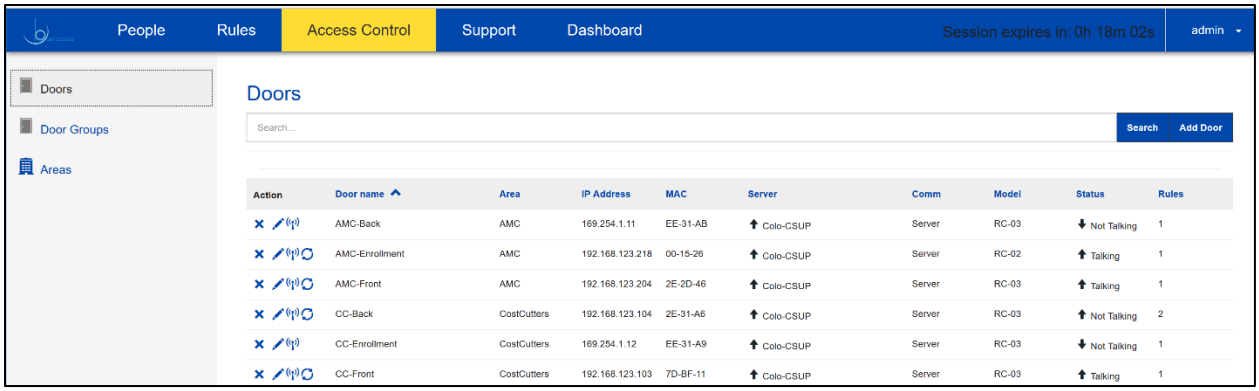


Primary Navigation – Access Control

When you select the Primary Navigation Access Control option, you will notice that the Secondary Navigation option has 3 items: Doors, Door Groups, and Areas.

Doors

The Doors page allows you to monitor and configure the system's readers. The initial display shows the list of current doors in a tabular format.



Columns of special interest include:

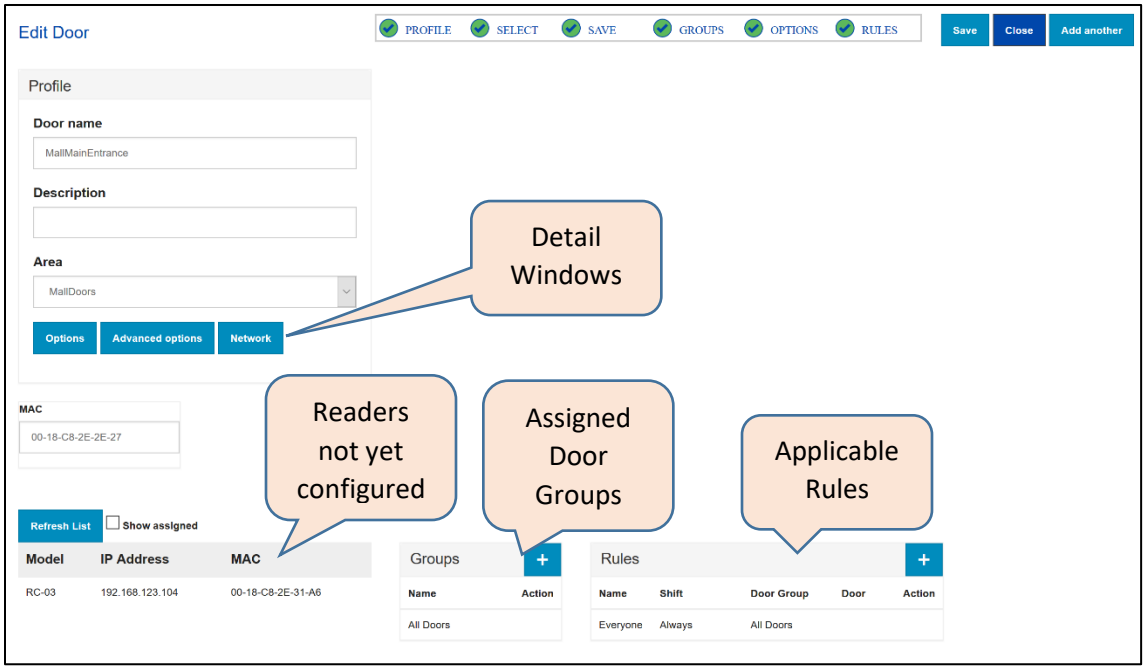
- Actions: ✕ Delete the door, ✎ Edit the door, ((•)) Ping the door, and ↻ Reboot the door.
- IP Address: The door's current Network Address
- MAC Address: The door's hardware address
- Server: The Host computer communications process that controls the door.
    - Note the arrow ⬆ allows the user to stop/start this communications process.
- Comm: The way the network communications is initiated.
    - (Server: Host→ Reader; Client: Reader → Host)
- Status: Talking, Not talking, or Disabled
- Rules: How many business rule(s) are associated with the door.

When a door is added

or edited, the Door Detail page will appear. Note that for many sites, the door's default setting make adding a door a very simple process.

- Type in the name of the door
- Select the associated reader from the list of discovered door.
- Save the record.

At that point, any business rules associated with the "All Doors" door group are automatically applied to the new door.



Door Name is a unique identifier for the door.

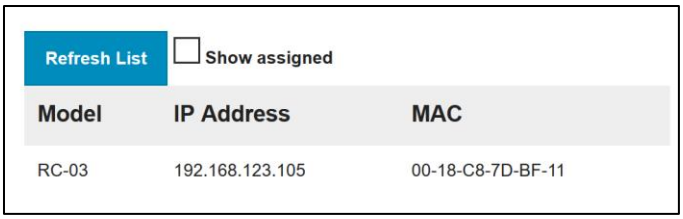
Description is an *optional* entry.

Area is a required field, and determines who can manage or monitor this door.

MAC is the unique hardware address of the door's reader.

Hardware assignment

Reader hardware is assigned to the door record by using one of two methods:



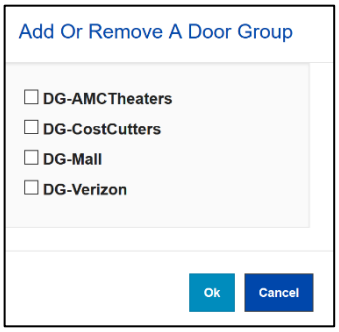
a) The local network will be scanned to locate any readers who are not already assigned to a door. Those readers will be included in the listing shown. By selecting one of the displayed readers, the current door's MAC entry field is populated with the selected reader's MAC Address.
b) for doors not found by the scanning process, the last 6 characters of the reader's MAC address can be directly typed into the MAC field.

Group Assignment

The door groups that this door is assigned to is displayed.

The door can be assigned to one or more Door Groups by selecting the add button + .

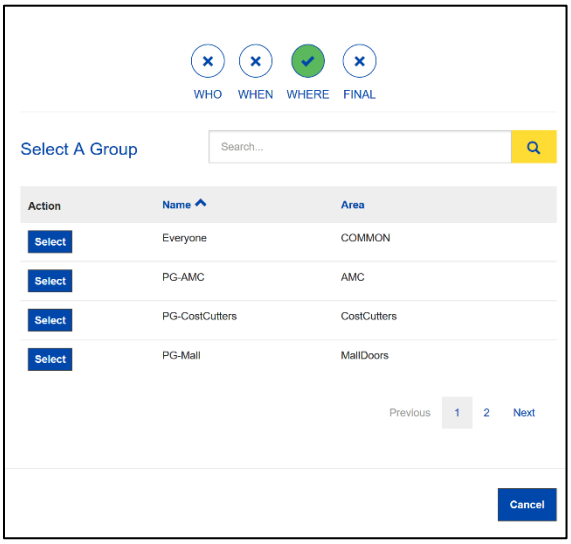
The Door Group selection page opens, where one or more door groups can be selected.



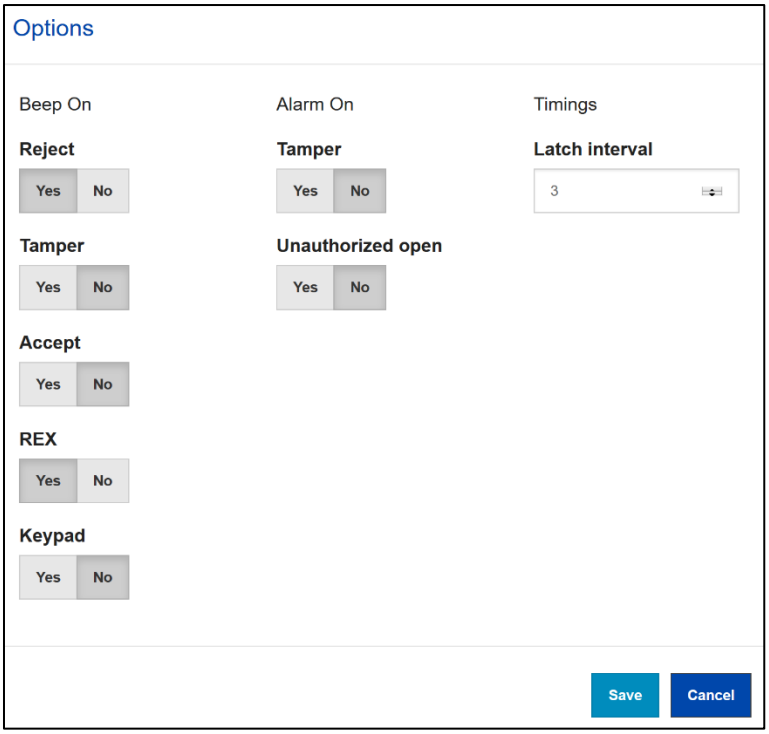
Rules

The defined business rules that affect the displayed door are shown. If you wish to add a business specifically for this door, then select the add button +.

A wizard will walk you thru setting up the new rule. The initial page's status indicator shows that the "where" setting has already been set to the current door.



Options Detail Page **Options**



Beep On

Defines which events will cause the door to generate audible alerts

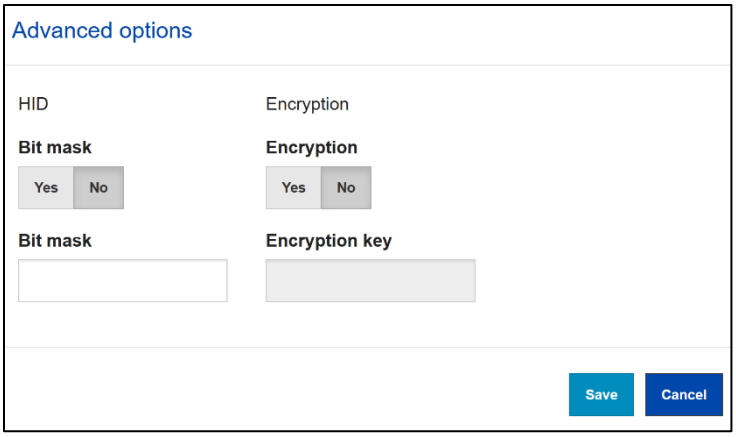
Alarm On

Defines which events will cause the door to report an alarm condition

Timings

Defines time intervals used by the reader, such as the latch interval. The amount of time that the door is unlocked after a credential is accepted is controlled by the “latch interval”.

Advanced Options Detail Page **Advanced options**



HID

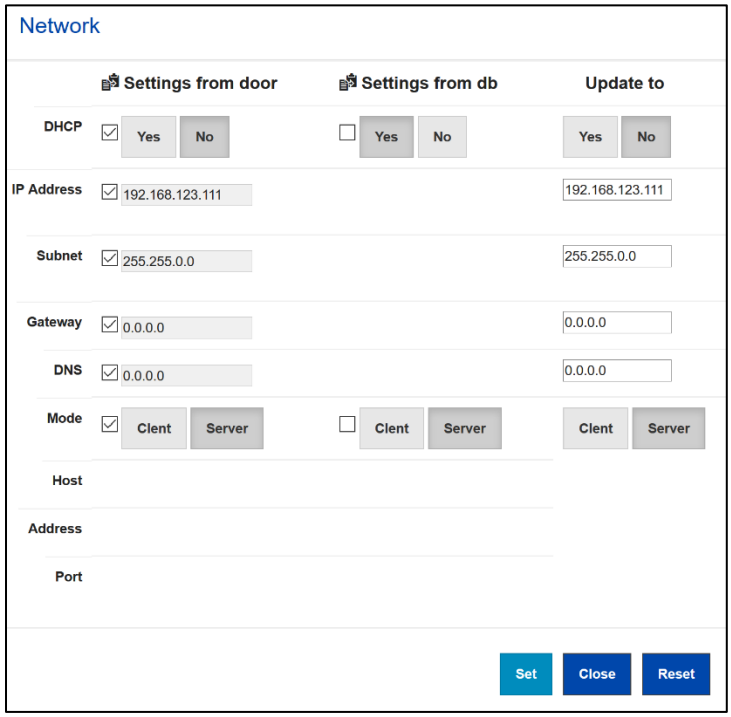
The reader can be configured to use a subset of the electronic data read from an HID credential. This selection method is controlled by a "bit mask", which defines what data (up to 32 bits) is used.

Encryption

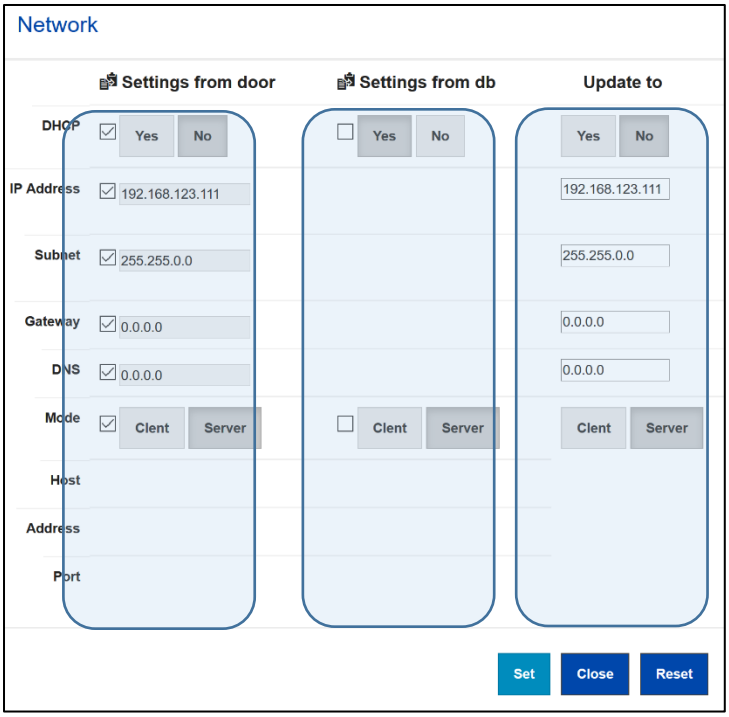
The communications between the reader and the host can be protected with AES 256bit encryption. Here encryption can be turned on, and the 32-byte encryption key can be specified.

Network Detail Page

This page allows you to configure how the reader communicates over the network.



To understand this page, it is helpful to think of it as having three columns and two rows.

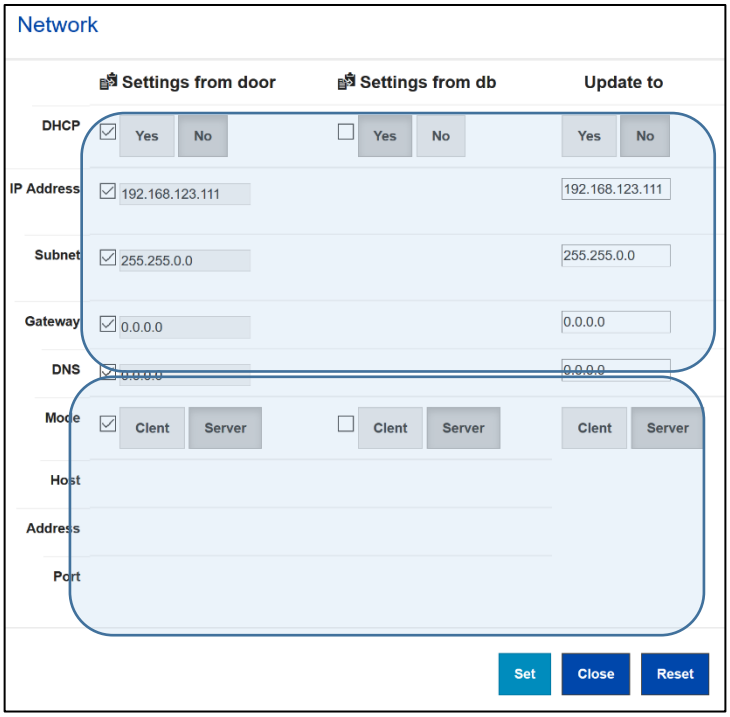


The three columns are:

Setting from door: Settings that are currently loaded into the reader

Setting from db: Settings that are currently stored in the host computer's databases

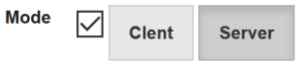
Update To: Settings that are to be sent to reader, and stored in the host database, when the set button is clicked.



The two rows are:

IP Address settings: The readers setting to talk on its network (DHCP on/off, IP Address, Subnet, …)

How the reader & host make a connection: Either the host knows how to connect to the reader is, or the reader knows how to connect to the host.

This is controlled by the Mode setting. 

If the host knows how to connect, then the reader is running as a "server". The opposite is when the reader knows how to connect to the host, then the reader is running as a "client".

This page may have data in the door column and/or the db column. By clicking on one of the checkboxes, ☑ the data from that area of the screen will be copied into the "Update To" column. The user can also change the "Update to" fields directly.

Once the configuration is complete, then the set button

is used to save the "Update To" column's setting to both the reader and the database.

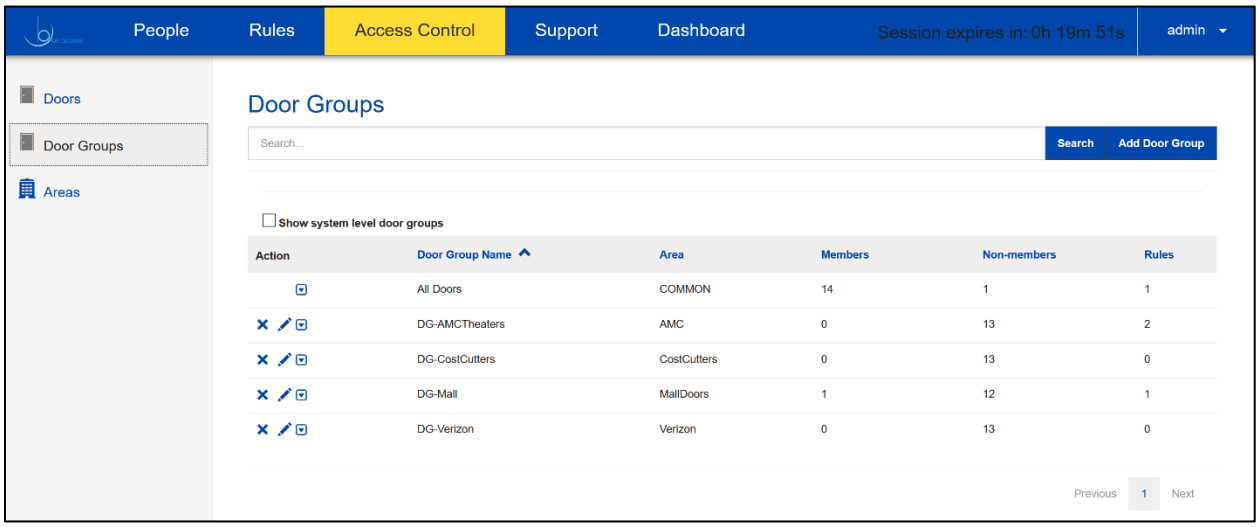
The reset button

can be used to reset the fields back to what was displayed when the page was first opened.

Door Groups

The Door Groups page allows you to create logical grouping of doors. These grouping are used to simplify creating system rules that affect multiple doors. Examples: Let this group of people, thru this group of doors. Send an email alert when a door in this group is left open too long. Track who has gone in, and not back out, of the doors included in this group.

The main Door Groups page shows a listing of the current Door Groups



Items of note:

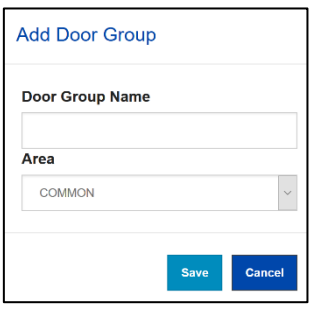
Under Action, the expand/collapse buttons will open/close a list of the doors assigned to that Door Group

The Members column lists the number of doors already assigned to that Door Group. Non-members lists the count of doors not associated with that Door Group

The Rules column list the number of who/when/where business rules that are dependent on that Door Group.

There is a system defined Door Group “All Doors”, that will automatically contain all defined doors.

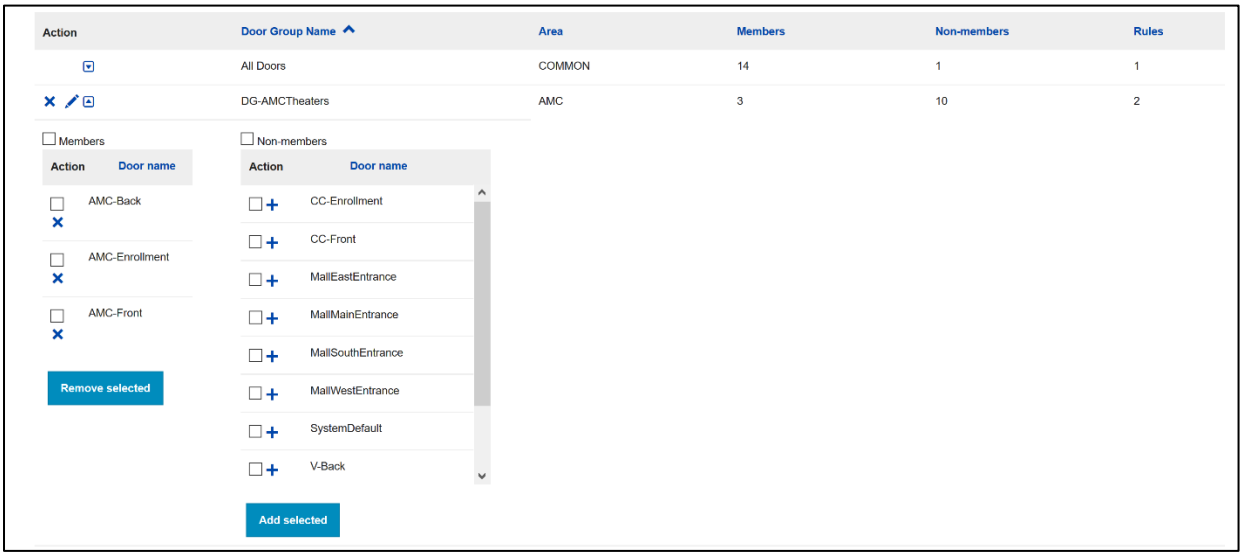
Adding a Door Group is simple. Select the **Add Door Group** button.



Fill in the Door Group’s name and area, and click Save.

When a Door Group is expanded , the page will show the system doors in two lists. Doors on the left are already assigned to that Door Group. Doors on the right are not part of the Door Group.

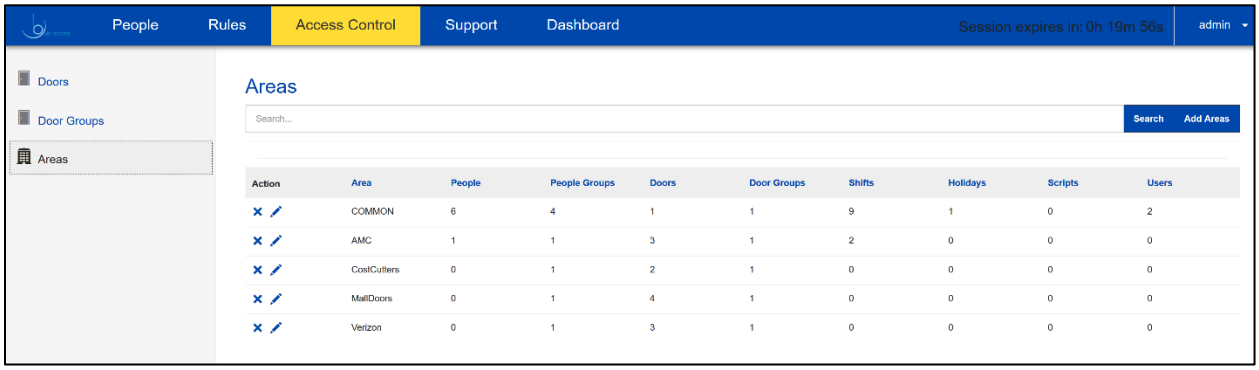
Clicking on the right side's checkbox will select a door. Once the desired doors have been selected, the AddSelected button will add the selected doors to the Door Group.



Using the collapse button will close the list of individual doors.

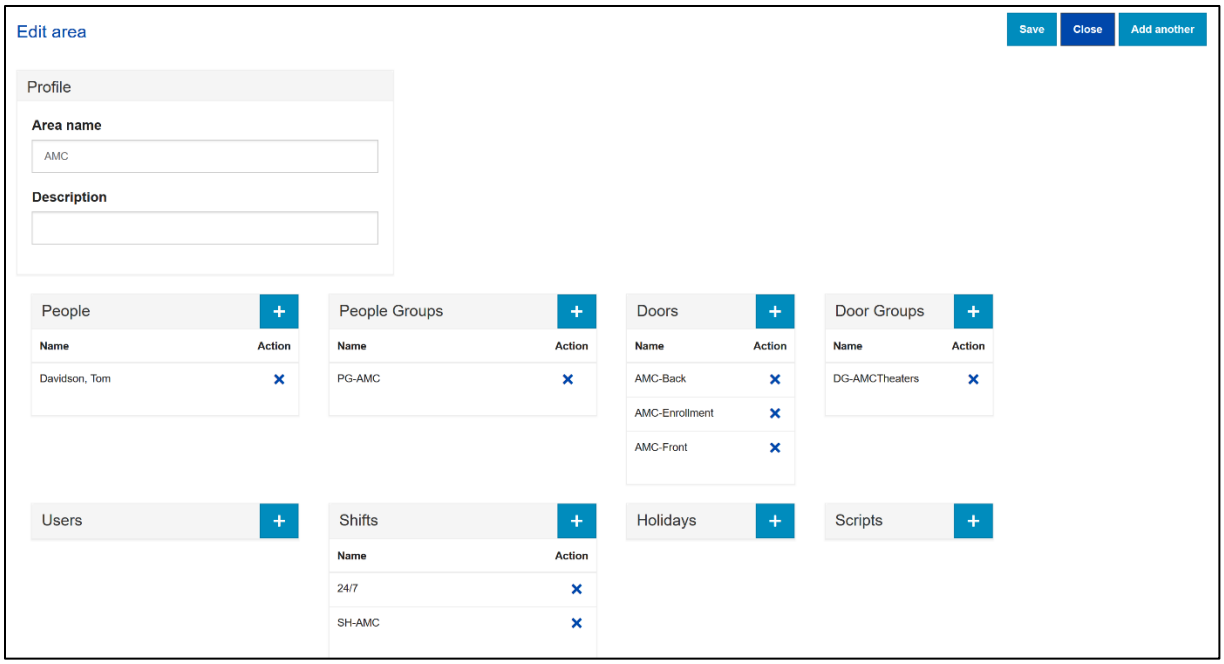
Areas

The Areas page allows you to configure and review the system's areas. The initial display shows the list of current Areas in a tabular format.



Each defined area is listed, along with a count of the system entities that are assigned to that area (People, Doors,…)

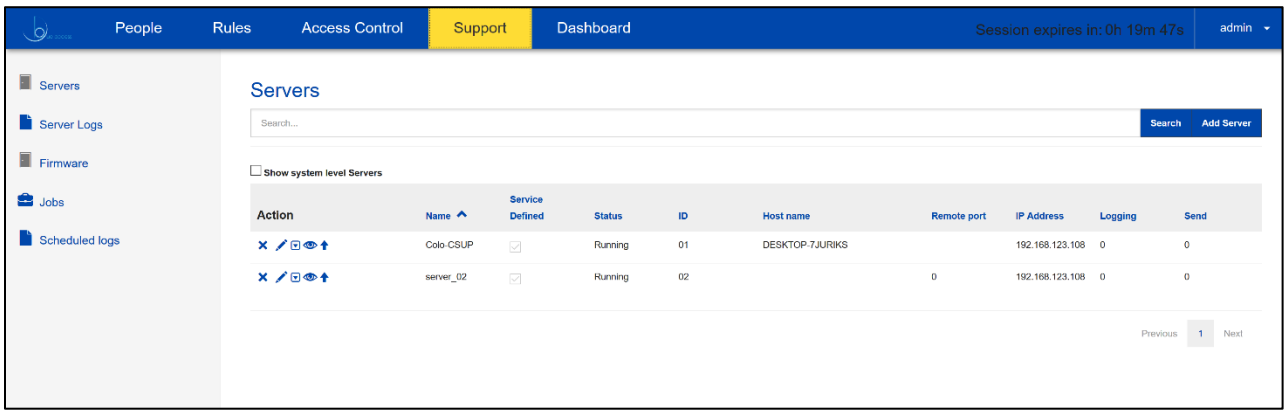
Adding or editing an Area opens this page.



Here the area can be named, and the system entities that are assigned to that area are displayed. From this page, entities can be added to the Area, or removed from the Area.

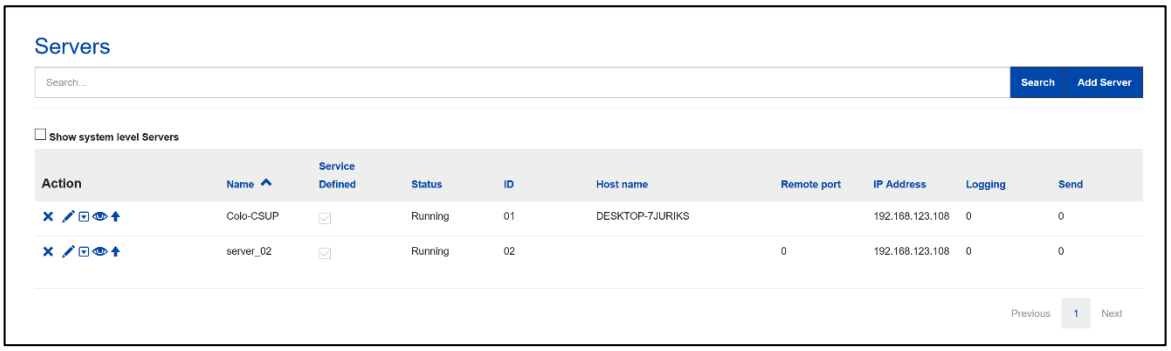
Primary Navigation -- Support

This section is used to support the system. For many installations, the System Administrator will be the only person who uses this section of the software.



Servers

"Servers" are computer programs/processes that run on the host computer, and support communicating with the readers. The Main Server page displays a tabular list of the defined servers.



Items of note:

Cobalt will automatically add servers as required. For most systems, there will be no need to modify this page.

Under Action,

A server can be deleted or edited

A listing of the doors being controlled by that server can be accessed.

The current status of the door communications can be added to the Server Log

The servers status is indicated, "running" or "stopped" , and the server can be stopped and started by clicking on the displayed arrow.

The Name of the server is typically system generated.

The "Service Defined" checkbox indicates that there is a Windows Service defined on the host, that will run this processes automatically when the host system is started.

The Status indicates if the process is running or not. Special status like "Stop Pending" will sometime appear.

ID is a 2-character alphanumeric identifier for this process. It is typically system generated.

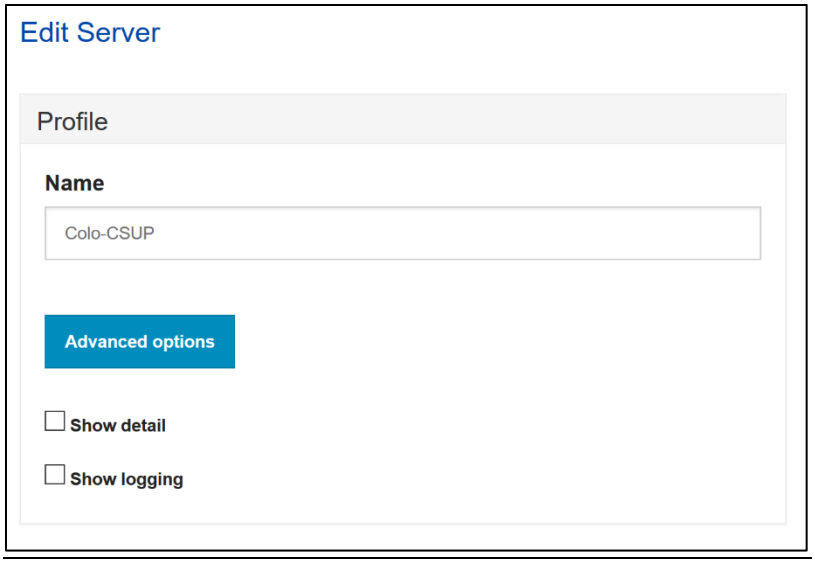
Host Name and Remote Port can be used for readers the run in Client mode, and connect to the host.

IP Address is the host's network address being used by this process.

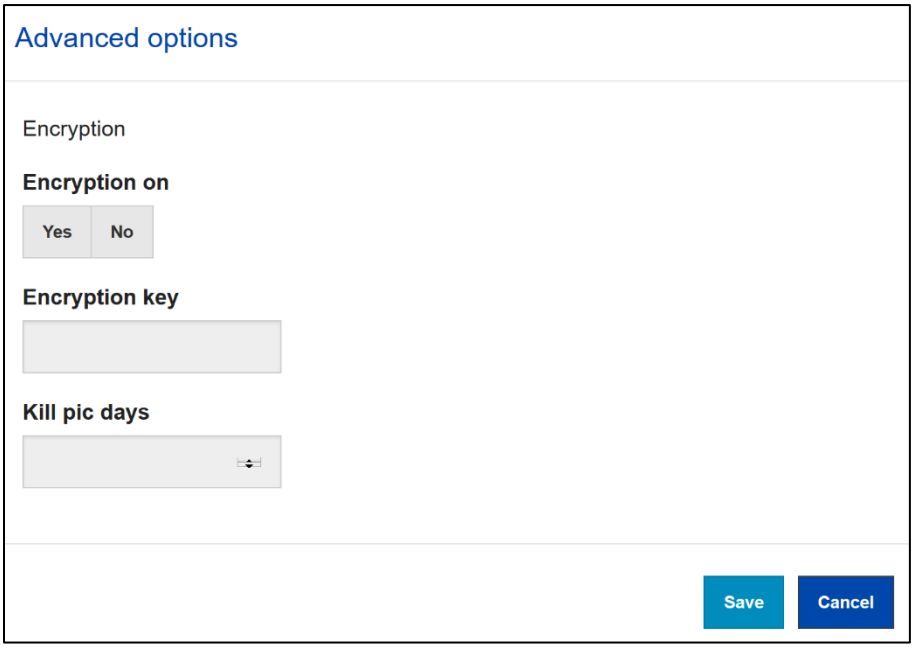
Logging indicates the amount of details being added to the Server Log

Send is a count messages who are waiting to be sent to the reader.

Editing a Server opens this page.

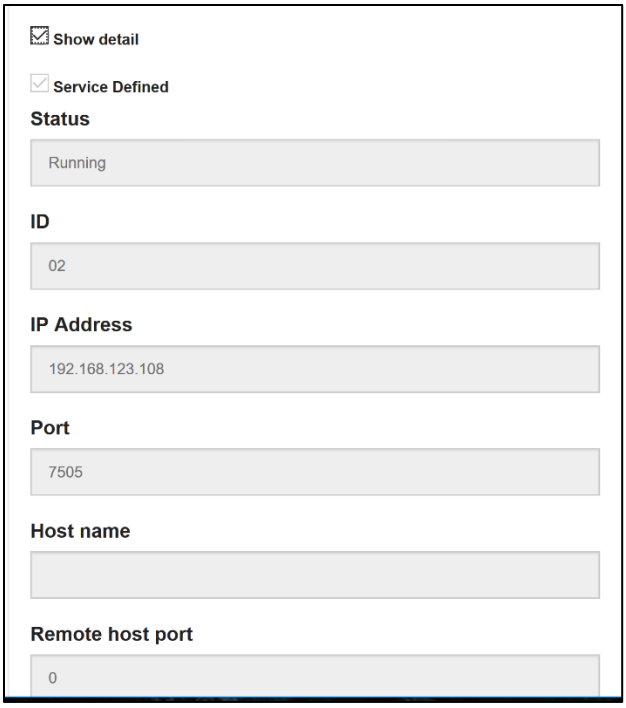


Selecting the button opens this page.



Encryption can be controlled, and a Kill PIC parameter can be defined. Kill PIC is an advanced option designed for leased hardware.

The Show Details checkbox opens this list of current server settings:



The Show Logging checkbox opens these details.

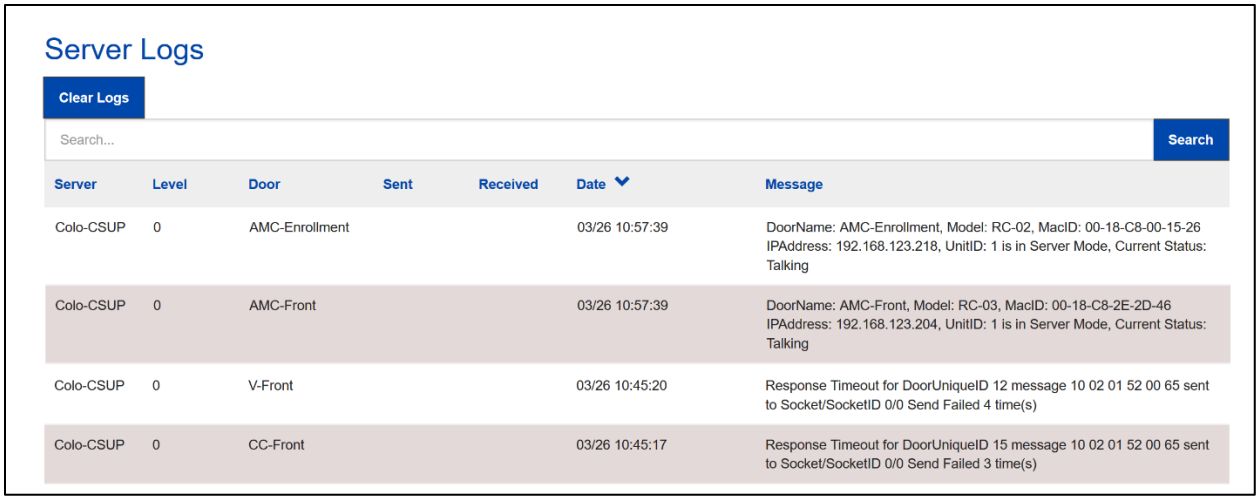
Log level can vary from 0 to 5, and determine how much detail is added to the Server Logs. 0 = minimum logging, and 5 is the most detailed logging.

End Date specifies when the server logging should automatically be discontinued.

Server Logs

The communications servers generate log entries of unusual

Cobalt's Server Log page allows for the review and maintenance of these logs



The details of the log are technical in nature, but a quick review of the entries shown above indicate that the system tried to communicate with the door V-Front and that attempt failed. CC-Front also had a communication problem.

Text searching of the logs is support, and the logs can be purged with the **Clear Logs** button.

If you are looking at a specific door, the text search box can filter the display to only show records related to that door's activity.

One example where clearing the logs would be helpful. Your facility has had power problem this morning. The network has gone up and down multiple times. Now the power has been fully restored. The Cobalt Server logs have many entries that were generated by the readers rebooting, and the network disconnecting and reconnecting. To have a cleaner view of any future activities, you may decide to purge the server logs now.

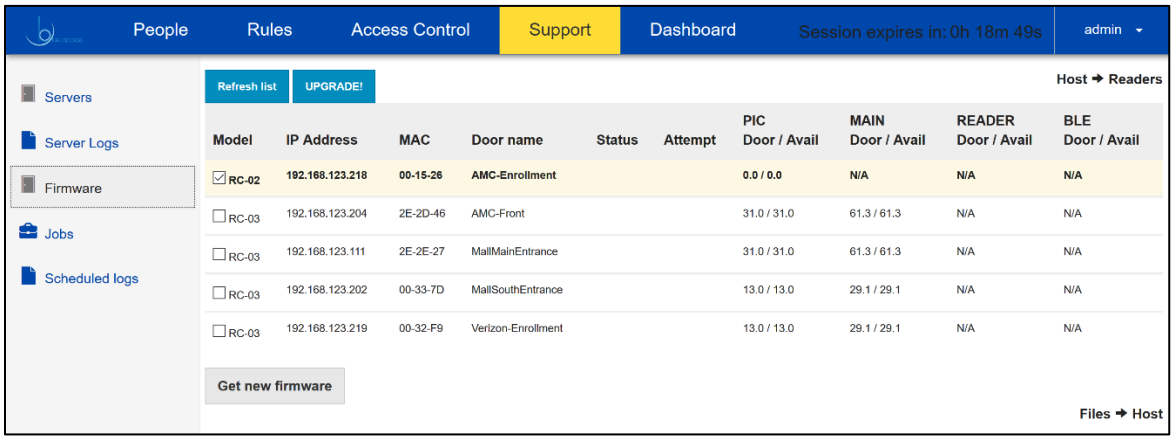
Earlier it was mentioned that the current status of a server's door communications can be added to the Server Log by clicking on the eye icon This action will add one log entry for each door that the server is responsible for. An example of the output is shown below:

Server	Level	Door	Sent	Received	Date	Message
server_02	0	Verizon-Enrollment			03/27 10:08:33	DoorName: Verizon-Enrollment, Model: RC-03, MacID: 00-18-C8-00-32-F9 IPAddress: 192.168.123.219, UnitID: 1 is in Server Mode, Current Status: Talking
server_02	0	Verizon-Enrollment			03/27 10:08:32	DoorName: Verizon-Enrollment, Model: RC-03, MacID: 00-18-C8-00-32-F9 IPAddress: 192.168.123.219, UnitID: 1 is in Server Mode, Current Status: Talking
Colo-CSUP	0	AMC-Enrollment			03/27 10:08:28	DoorName: AMC-Enrollment, Model: RC-02, MacID: 00-18-C8-00-15-26 IPAddress: 192.168.123.218, UnitID: 1 is in Server Mode, Current Status: Talking
Colo-CSUP	0	AMC-Front			03/27 10:08:28	DoorName: AMC-Front, Model: RC-03, MacID: 00-18-C8-2E-2D-46 IPAddress: 192.168.123.204, UnitID: 1 is in Server Mode, Current Status: Talking

Firmware

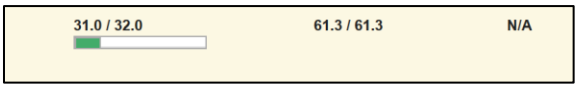
The Firmware page allows you to monitor and updated your reader's firmware.

The initial page displays a listing of the system's readers. The readers who need to have their firmware updated will be shown with a yellow background. If you do not wish to upgrade a certain reader, remove the check from that reader's selection checkboxes.

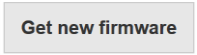


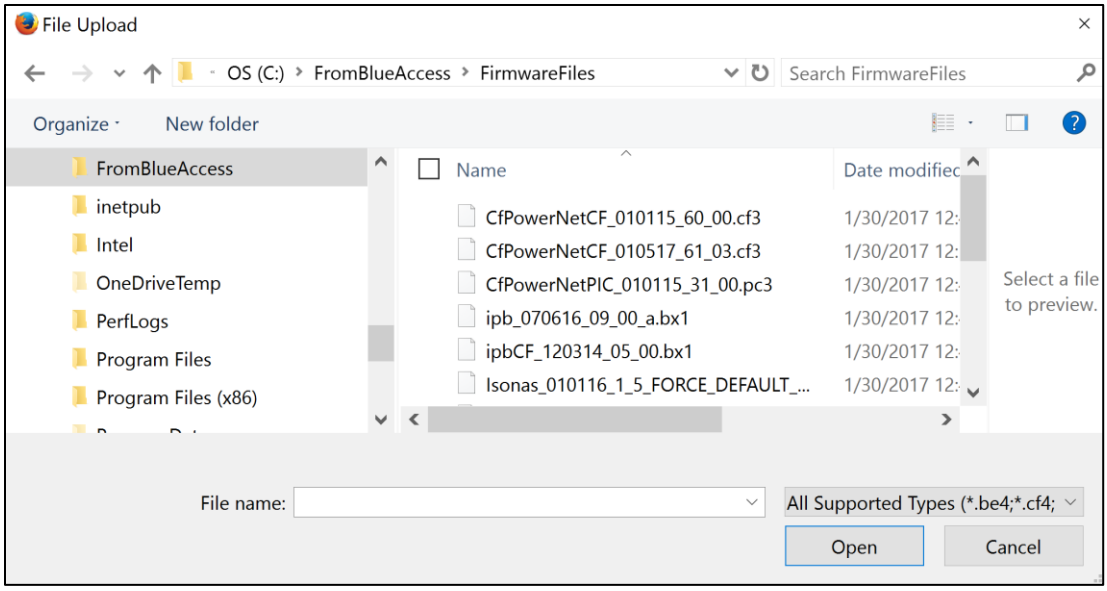
Clicking on the button will upgrade the firmware on all the selected readers.

During the firmware upgrade, progress indicators will track the status of the upload process.

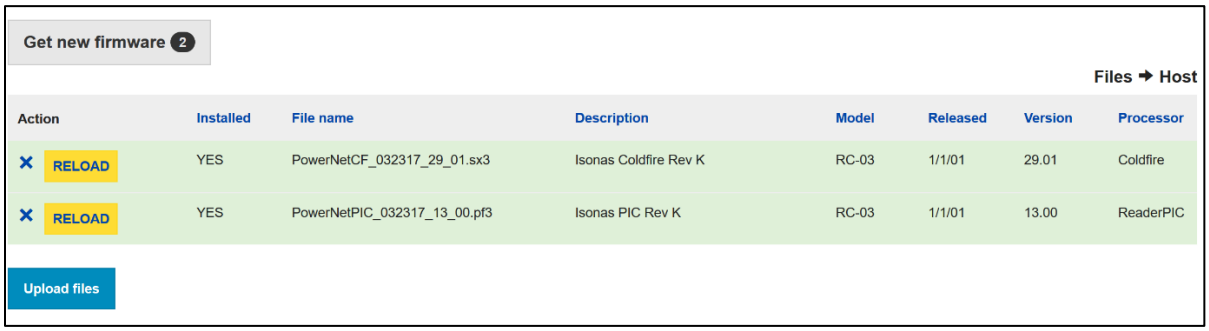


Different models of readers require different types of firmware. The display will show the version number appropriate to each model. Some columns will be empty, indicating that that specific reader does not use that column's firmware.

At times, new versions of the firmware will be available thru Blue Access. You would need to download the new firmware files from the BlueAccess website. Then, these updates would need to be loaded into your system. Next, the  button allows you to select the firmware to be uploaded.



The files you have selected to load are shown on the bottom of the page.

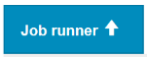


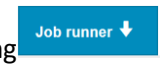
The Upload files button will start the process of loading the firmware from the distribution file into you host system's database (Note: this step is not changing the reader's firmware).

Jobs

Easy2017 has a set of background tasks that complete maintenance on the system. These tasks are run thru the Job Scheduler.

The Jobs page displays the state of the Jobs. The Next Run field indicates when the Job will be run again The Last Run displays the when the Job was run last.

The 

button's up arrow indicates the Job Schedule is running. Click on the button, and the Job Scheduler will be stopped. The down arrow indicates that the Scheduler is not running 

.

Scheduled Log.

A record of past Job activity is shown on this page. Text searching is available to quickly find history from specific activities.

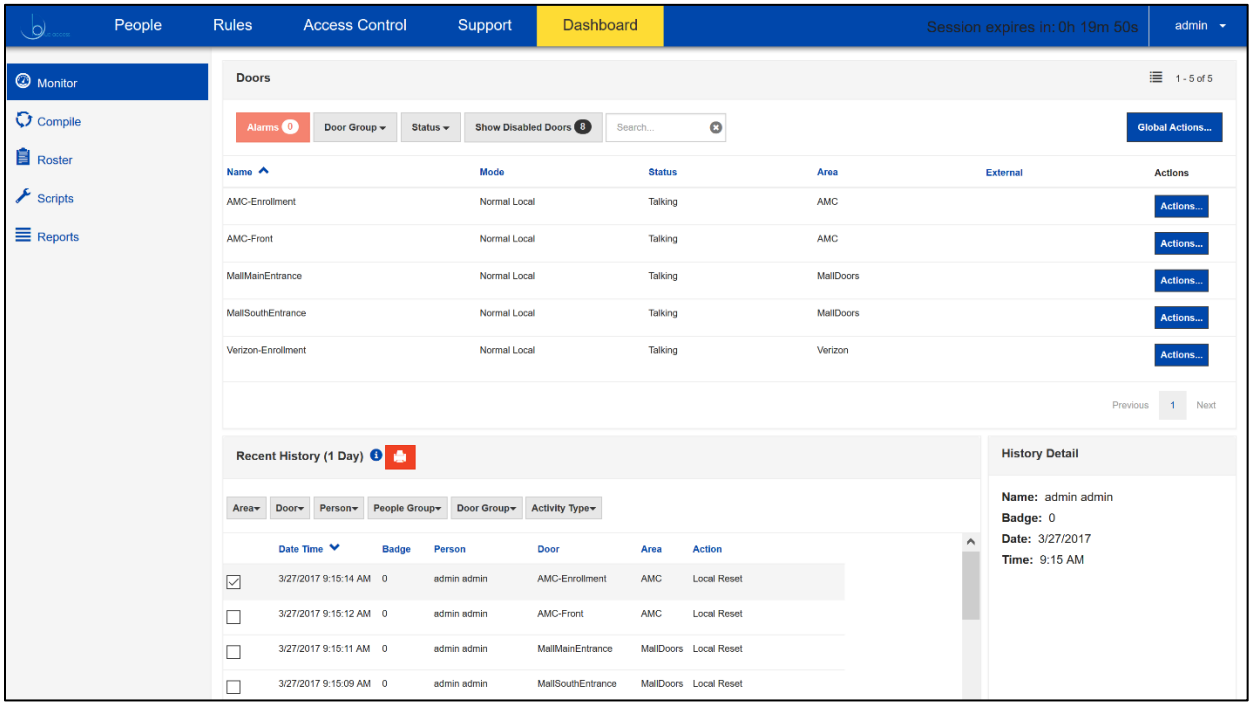
You have now completed the fourth of 5 Primary Navigation options. The last option is Dashboard which is unlike the rest of the system.

Primary Navigation -- Dashboard

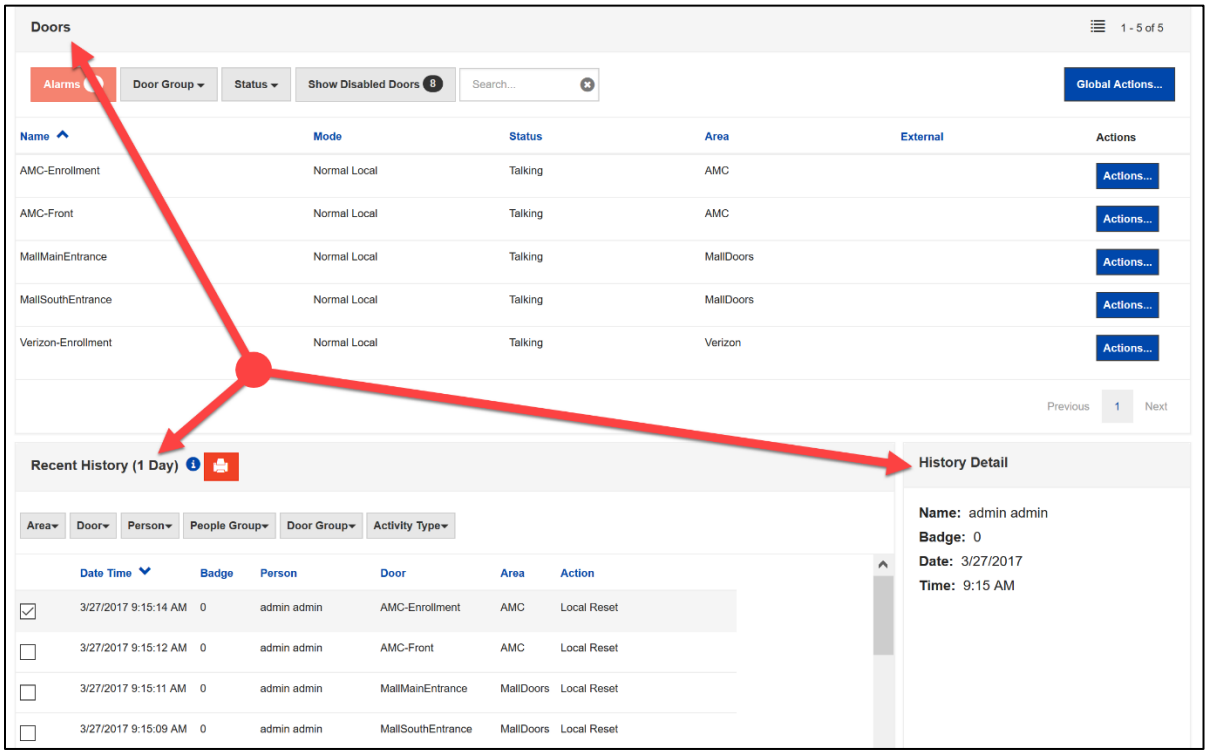
When you select the Primary Navigation Dashboard option, you will notice that the Secondary Navigation option has 5 items: Monitor, Compile, Roster, Scripts and Reports.

Monitor

The Monitor is often times a highly-utilized option of the system. It is where you go review the status of all your doors, and you can also case a door to lock or unlock from here.

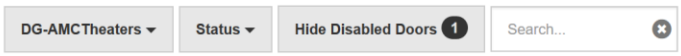


Let's take a closer look at the monitor option because it is subdivided into 3 sections, Doors, Recent History and History Detail.



Doors

The Doors section display a list of all the doors the logged in user is authorized to see and or control. You can filter the list of doors that you want to see by using the 4 options listed as shown below.



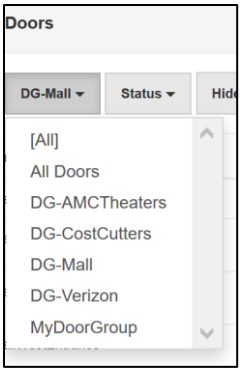
Door Group will display only the doors that belong to the door group you select.

Status will display only doors that are in the status you selected.

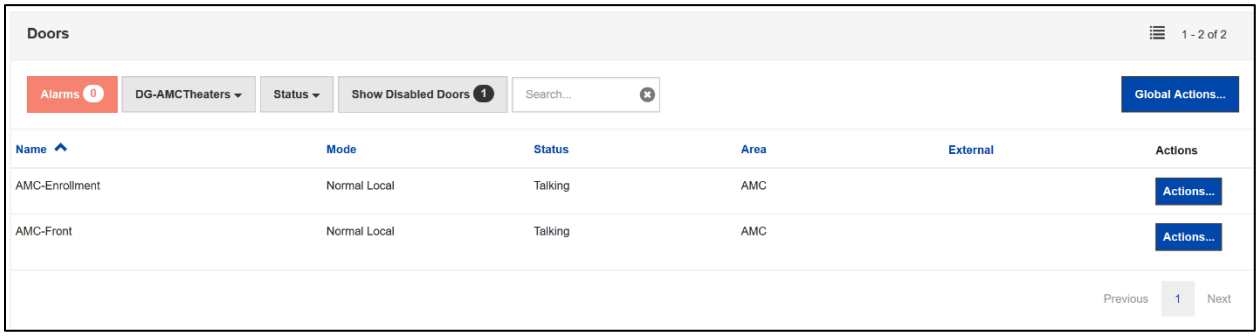
Hide/Show Disabled Doors controls if the listing includes disabled doors.

Search will allow you to filter on anyone of the columns in the door list, this works just like any other search bar in the system.

In this example, we are going to display both active & disabled doors, and filter the door list to only the doors that belong to the door group DG-AMCTheaters.



The results of selecting DG-AMCTheaters in the Door Group drop down box is shown below.



Within the Doors section, there are two more interesting buttons, **Global Actions...** and **Actions...**.

Both buttons will allow you to take an action either on the selected door or all of the doors displayed in the door list, the actions are: Normal, Admit, Lock and Unlock. You can display these actions by clicking on the button.

Normal will toggle a door out of either Lock or Unlock and place it in the mode where it is ready to read credentials.

Admit will open the door for the doors latch interval time. This is analogous to a person presenting a valid badge at the door.

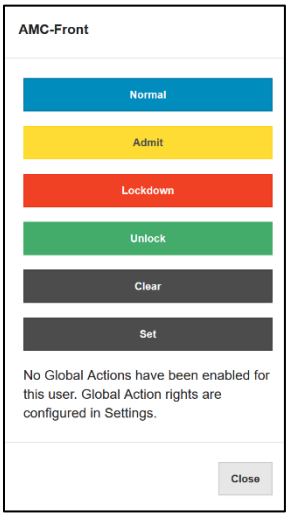
Lock will place the door in a locked mode where it will not process any more cards. There is an excepting to the door not processing any badge carries with it the special attribute setting of a Master Badge.

Unlock will place the door into an unlocked state, the door will stay in this state until either you issue a normal action against the door or the current shift that the door is operating under ends.

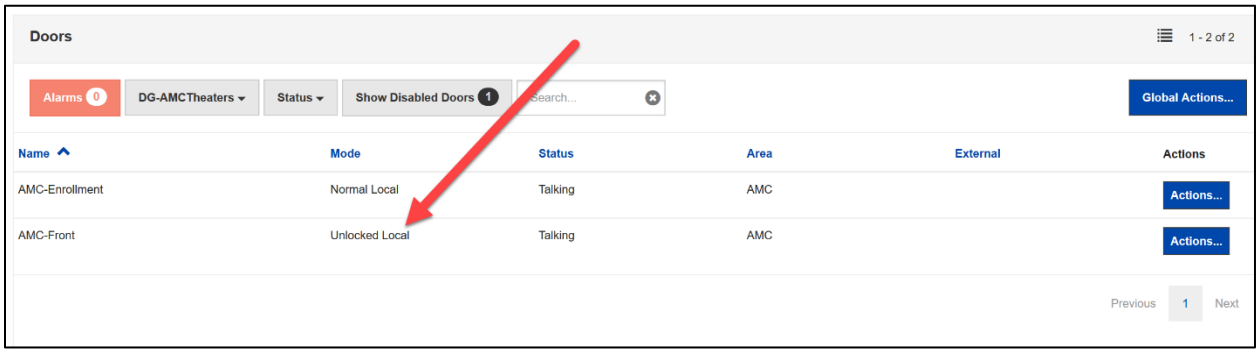
Clear This button places the door into “local” mode. It is used after the “Set” button is used and the door no longer needs to run in “host” mode.

Set This button places the door into “host” mode. Some manual control actions require the door to run in host mode.

In our example, we will click on the “Actions…” button for the AMC-Front door and then click the Unlock action.



You will notice that the doors display will correctly show that the door is now in an unlocked state.

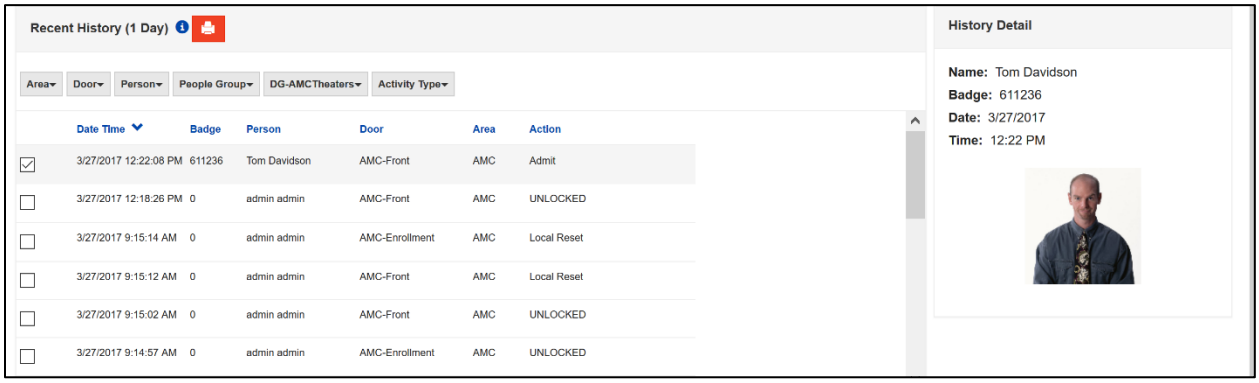


This is an important feature of the Dashboard; the displays are showing information in real-time. This means that as the doors change state, the display will automatically update, you can just sit back and watch. Because the constant refreshing of the screen can cause delays, you can control how often it happens. This will be discussed on the “System Settings” later in this document.

The “Global Actions…” works the same way with the same results, however it will perform the action on every door in the door list.

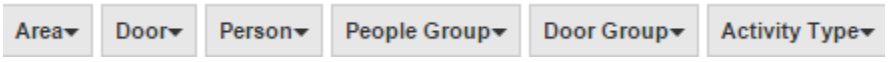
It’s time to move onto the next section of the Monitor which is the History Log and the associated History Detail.

History



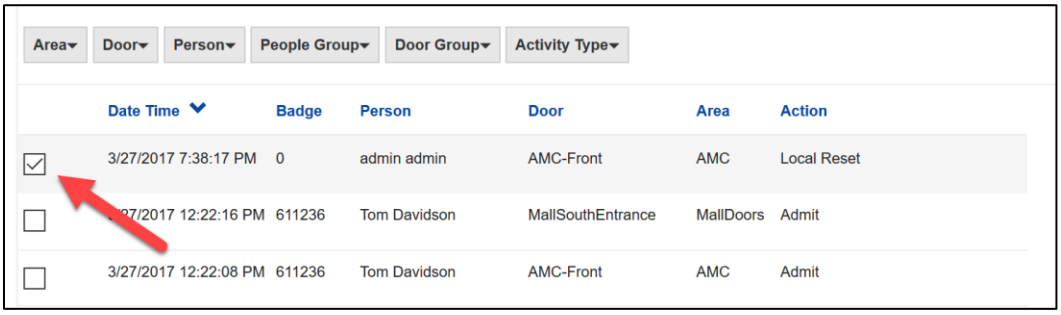
The History log section is a real-time display of every event that is happening at every door in the system. The History log is filtered out to only show you the areas that you have been authorized to observe. In our example this means that if you were only assigned to the AMCtheater area, then you would only see History log entries associated with doors in the AMCtheater area.

The History log information can be filtered by many selection criteria.



are all filtering options designed to make your task of looking for specific History log events easier.

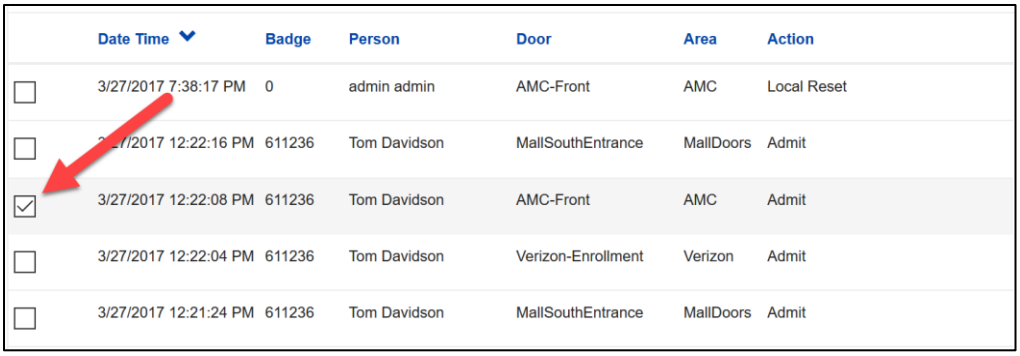
The list of History log events has a check box in the first column. This ☑ indicates the currently selected log event, the detail to this selected log event is shown on the right side of the screen in the history detail.



During normal operations, the ☑ will automatically select the newest item in the History log so that the History detail is constantly auto displaying. If you select a History event entry other than the 1st one in the list, then you will have 'frozen' the History detail on this entry. This is very useful in busy systems where the History log is continuously receiving new entries but you want to concentrate on a selected event.

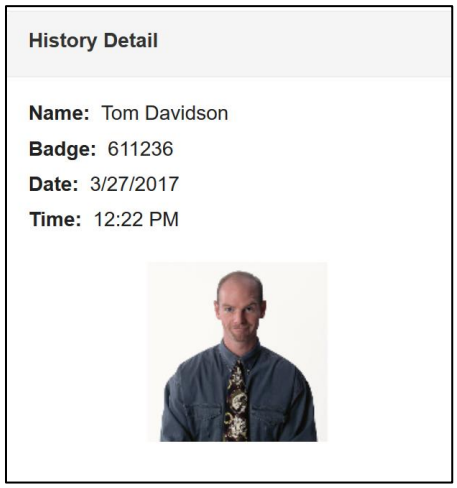
History Detail

Turn your attention to the History detail area on the right side of the screen. As stated, this section of the screen displays the detail for the selected History event, but we have not discussed exactly what is displayed. To illustrate this better, we will scroll down on the History event log to an entry that has a badge number and person name as seen below.



	Date Time	Badge	Person	Door	Area	Action
☐	3/27/2017 7:38:17 PM	0	admin admin	AMC-Front	AMC	Local Reset
☐	[illegible]/2017 12:22:16 PM	611236	Tom Davidson	MallSouthEntrance	MallDoors	Admit
☑	3/27/2017 12:22:08 PM	611236	Tom Davidson	AMC-Front	AMC	Admit
☐	3/27/2017 12:22:04 PM	611236	Tom Davidson	Verizon-Enrollment	Verizon	Admit
☐	3/27/2017 12:21:24 PM	611236	Tom Davidson	MallSouthEntrance	MallDoors	Admit

When this entry is selected, the History detail will display the image below.



Now you might recognize the usefulness of the history detail, it will show the picture that is associated with the badge holder.

The last item we will call your attention to is the symbol which hopefully you recognize as the availability of a report. If you click on this report symbol, a PDF file of the matching History Log entries will be created.

Moving right along, we will now explore the second item on the Secondary Navigation menu under the Primary Navigation of Dashboard and it is the Compile option.

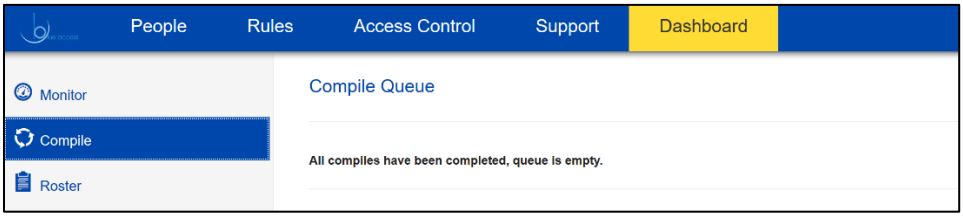
Compile

To understand this option, we should discuss something that we have not touched upon yet and this is known in the Blue Access ACS as the compile process. The compile process takes all the configuration information that you have set up and crunches this information into a format the readers can digest. Once the information has been crunched, the compile process sends this information the affected readers.

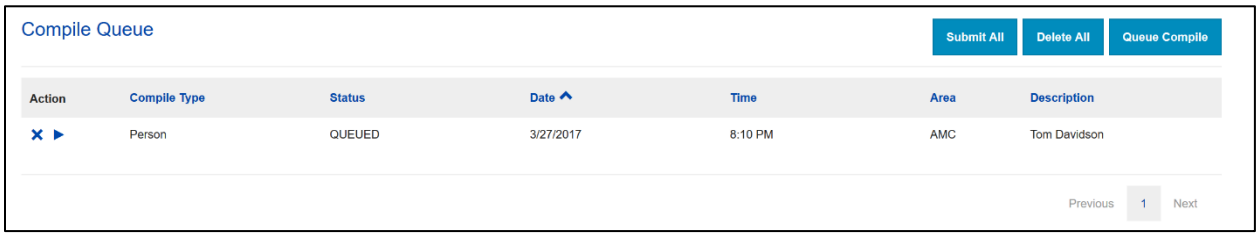
The compile process is managed by Cobalt. There are 2 ways that the compile process can be kicked off; 1, automatically, which means that as you make changes the compile process is kicked off without you

even being aware of it, this is the preferred method of operation; 2, queued up, which means that the compile commands will be queued up within Cobalt waiting for you to set them free.

Typically, the display shows that the queue is empty and that is because most systems are set to automatically compile. We won't show you right now, but we will sneak in and turn off the automatic compile process so that we can demonstrate this screen better.



We turned off the compile process AND we went in and made a change to the configuration of the system, namely we add a badge to a person in the system. Now when we display the Compile screen, we will have some information to discuss with you.

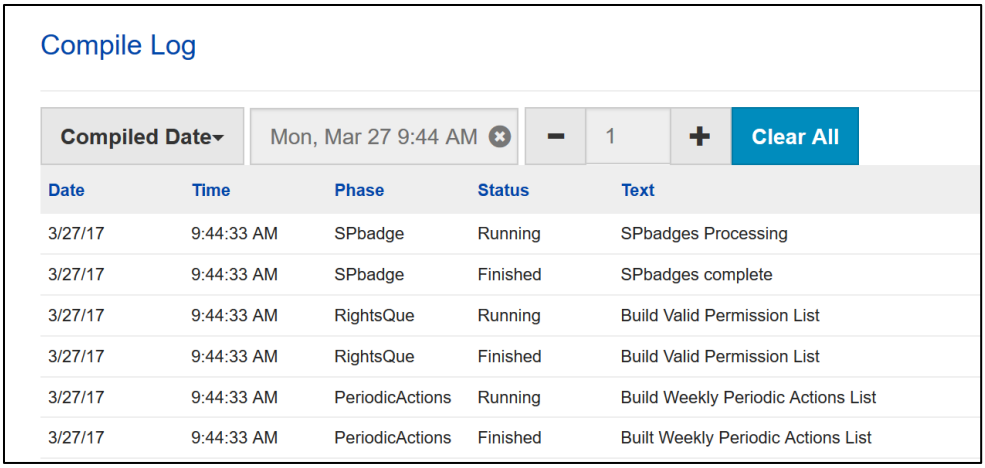


This screen now shows that there is a single compile awaiting execution, the type of compile is of "Person" and the date and time it was entered is displayed. At this point, if we want to submit the compile, we have two choices. we can click on the **Submit All** button or we can click on the ▶ icon next to the compile entry in the work content area as shown below.

What happens if you do not execute this compile? Good question, the answer is that the badge that you just entered for the person will not be valid at any doors.

The last option you have on this page is to delete the compile that is in the queue, you can do that by clicking on the **Delete All** button or by clicking on the ✕ icon next to the compile entry in the work content area as shown above.

The compile log shows the different steps that have been completed in the previous compile processes. It is tool to help track when compiles were run, and what stages those compile processes completed.



A good question on your part might be, "why would I ever turn off the automatic compile?" The answer is this, if you are going into the system to make a lot of changes, then you might turn off the automatic compile until you are all done and then execute all of the queued-up compiles at once.

We have not forgotten to show you how to turn on and off the automatically compile feature, but we are saving that for a little later on in this document.

Let's look down the Secondary Navigation of the Primary Navigation for Dashboard and see what's next, ah yes, it's Roster.

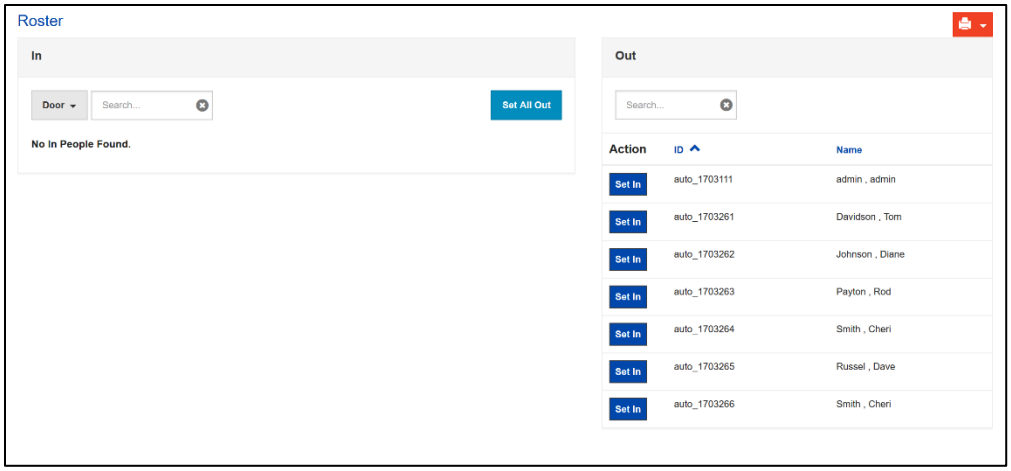
Roster

The roster feature is dependent on the concept of "IN" and "OUT" doors.

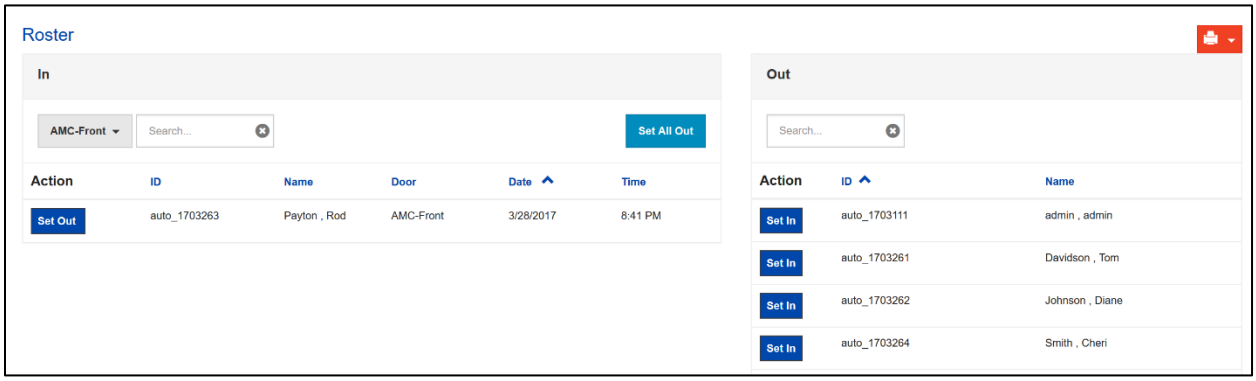
A door can be designated as an "IN","OUT", "IN/OUT Toggle" or none of the above. This feature is usually deployed when a customer site wants or needs to know who is in the facility and who is not. You can imagine a coal mine where they are concerned about the safety of the miners, especially when they are about to detonate a charge! In such an environment, it is essential to track the people as they go into and out of the mine through a controlled area.

The way this would get configured is by designating one door as an "IN", and another as an "OUT". If there is only one physical entry/exit, then they could choose to designate a single door as an IN/OUT toggle. When a door is designated an IN/OUT toggle, the presentation of a valid badge to the door will toggle the person IN and OUT of the system.

Since our fictitious system is a shopping mall and not a coal mine, we will make due with using the AMC Theater for our purposes. We set the Front door as an IN door, and the Back door an OUT door.



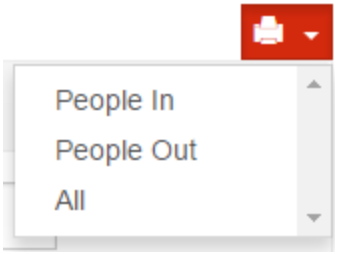
The people who are outside of the theater are listed on the right side of the page and the people inside the theater are on the left. I'm going to ask Rod to come in through the front door by presenting his badge.



Diane is now considered IN.

Within minutes of a site setting up their system to have IN and OUT doors, someone will forget to use their badge and the end up OUT when they are really IN or vice versa. The Roster page allows you to manually correct these situations by clicking on either Set Out or Set In depending on your need. Another use of the page is at the end of a long day and you know that no one is in the facility, you can go to this page and click on the Set All Out to move all the people OUT.

If you noticed the indicating that there is a report available, you may have noticed that this report icon has a down arrow on it, this indicates that there are multiple reports available. If you clicked on this down arrow you would see that the reports are People In, People Out or All.



Let's leave the Roster page and concentrate on the Scripts option which is next.

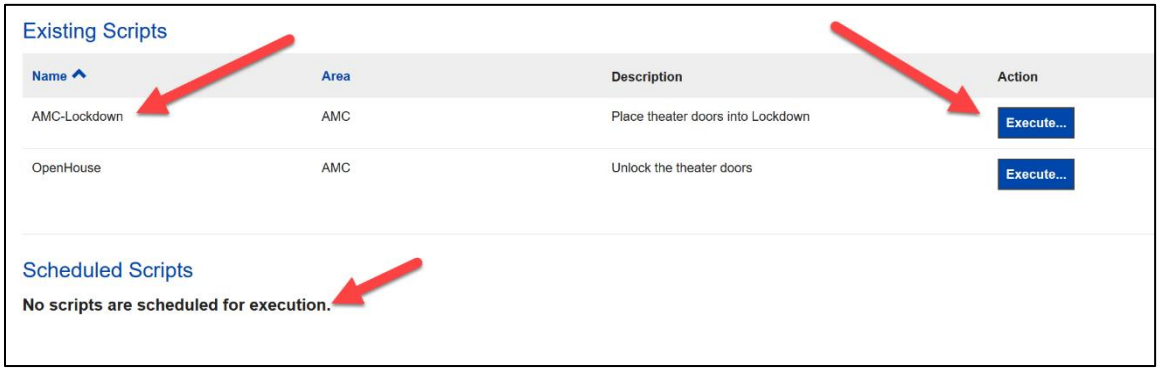
Scripts

Scripts were briefly mentioned earlier in the document as being a power system feature, we are going to cover this topic in much greater detail now.

In the Cobalt Thick-Client you have the ability to configure a script. In the Cobalt Web-app, you can execute those scripts. A script allows you to take multiple actions with a single step and the best example is the ability to lock down your facility.

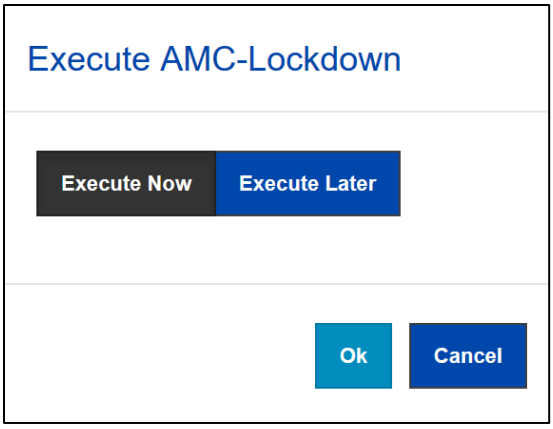
If you did not have the ability to set up a script, you could use the Monitor option of Cobalt to select one door at a time and perform the lock action; how would you like to do this in an emergency situation with 1013 doors? Scripts to the rescue!

You can configure a single Script that will lock down all of the doors in your facility, furthermore you can name that Script AMC-LockDown to make it immensely clear as to what the script will do. For our example, we have gone in and created such a script in the Thick-Client and it shows up in Web-app as seen below.



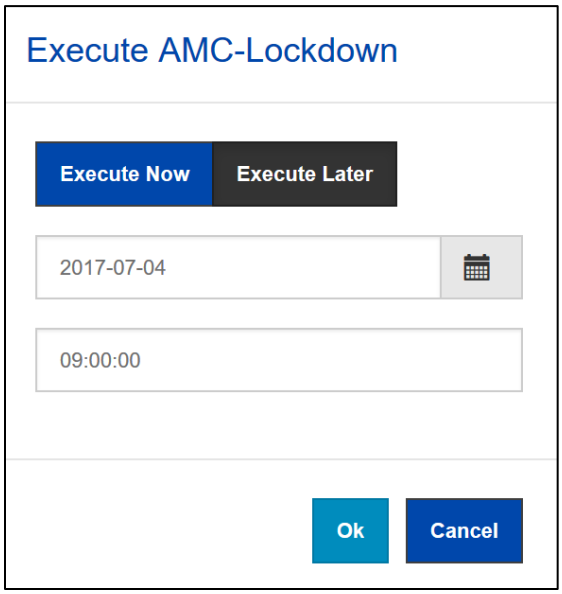
You can see the script named AMC-LockDown defined in the system and we have the ability to Execute... it. You can also see that there are no scripts currently scheduled to execute.

If you wanted to execute the LockDown script you would click on the Execute... button and you would see the following box.

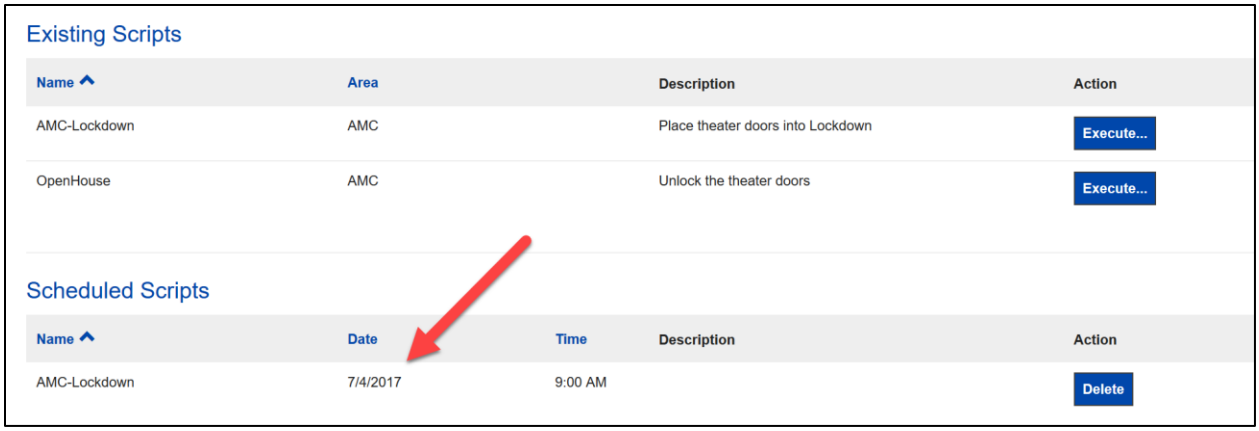


This box is asking you if you want to Execute Now now or schedule it to Execute Later later. At first example of a LockDown that someone might want to schedule to execute may not seem to make sense, but this feature is used when a site wants to schedule a test of their LockDown script.

Clicking on the "Execute Now" button would in fact execute it right away; however, that does not fit our demonstration for this User's guide very well and so we'll click on "Execute Later"



We have set up our LockDown script to execute on 7/04/2017 at 09:00 a.m.



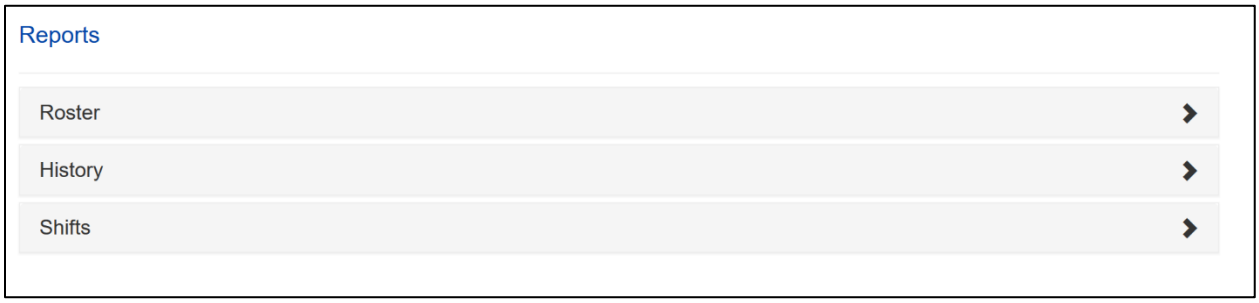
Once a script has been scheduled to execute, you do have the option of stopping that from taking place by clicking on the Delete option corresponding to the scheduled execution.

Scripts, simple but powerful!

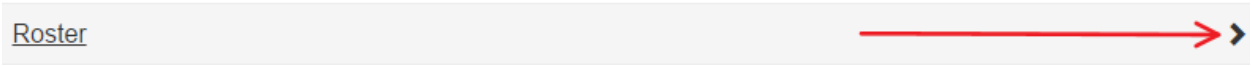
The last Secondary Navigation option within the Primary Navigation Dashboard is Reports.

Reports

The Reports page shows that there are 3 major reports available, these same reports are available by way of the icon in their perspective sections of Cobalt. The reports are gathered here a shortcut to execute them but they are the identical reports found in the system elsewhere.

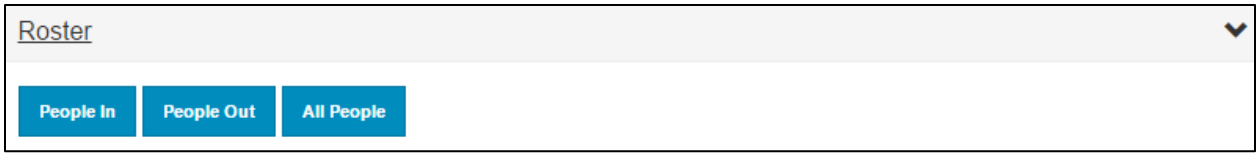


You expand out the report option by clicking on the as shown below.



Roster

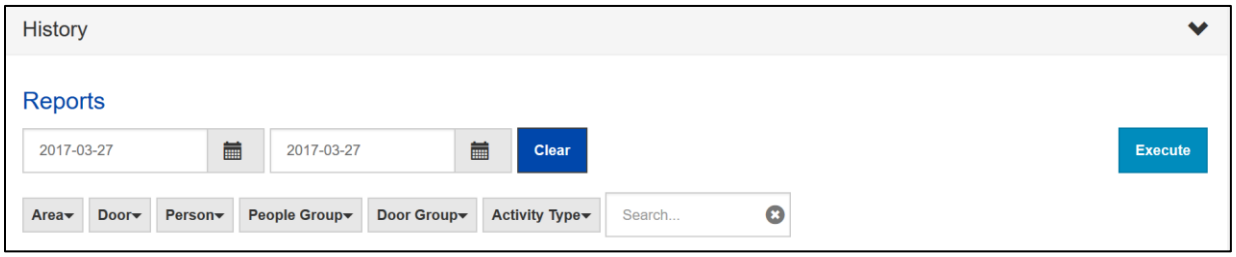
Expanding the Roster reveals that there are the same 3 reports that we discussed while reviewing the Roster option.



Since these are such simple reports, you simply click on the one you want and the PDF is created.

History

Expanding out the History report reveals that you have all the same options for filtering the report here that you do within the History section of the Monitor page.



Since this report allows you to set up some selection criteria, you execute the report by setting up the criteria and clicking on the “Execute” button.

Shifts

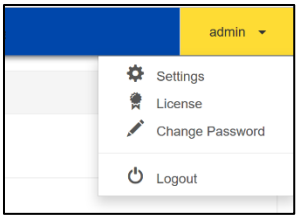
Expanding the Shifts report reveals that this is a very simple single report, you just click on the “Execute” button to create the PDF.

You did it, you have read through the entire User’s guide.

System Operations and Settings

But wait, if you look on the Primary Navigation bar you will see that at the right-hand side there is a drop down box with the text “admin” next to it. Aren’t you curious?

Of course you are. The text “admin” is actually the name of the logged-on user. Clicking on the down arrow will show you that there are 3 options to select from.



Let's do the easy ones first.

Logout

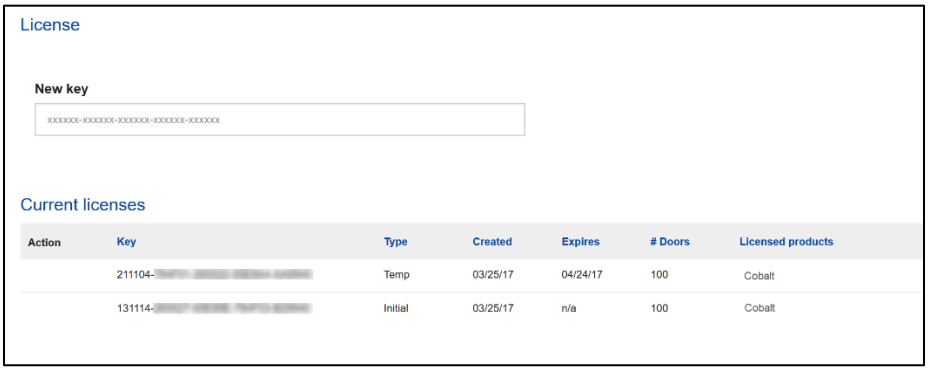
Logout, you cannot survive in today's world without understanding what this means, it will log you out of Cobalt.

Change Password

Change Password will allow you to change the password of the logged-on user.

License

License will allow you to review current software licenses and apply any new license key you receive.



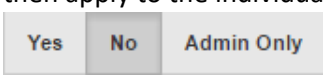
To add a license, type in the supplied key value into the "New Key" field. As a guide, the field's background will turn green when a key of the proper length is input. A red background means too many characters have been input.

> Note: When Cobalt is first installed, it is automatically licensed for a 30-day trial period, supporting up to 100 doors.

Settings

Settings, these are system settings which are described below.

Many of the options in System Settings have the same operational features, so we'll cover it once and then apply to the individual fields as we hit them. If the setting takes the value of

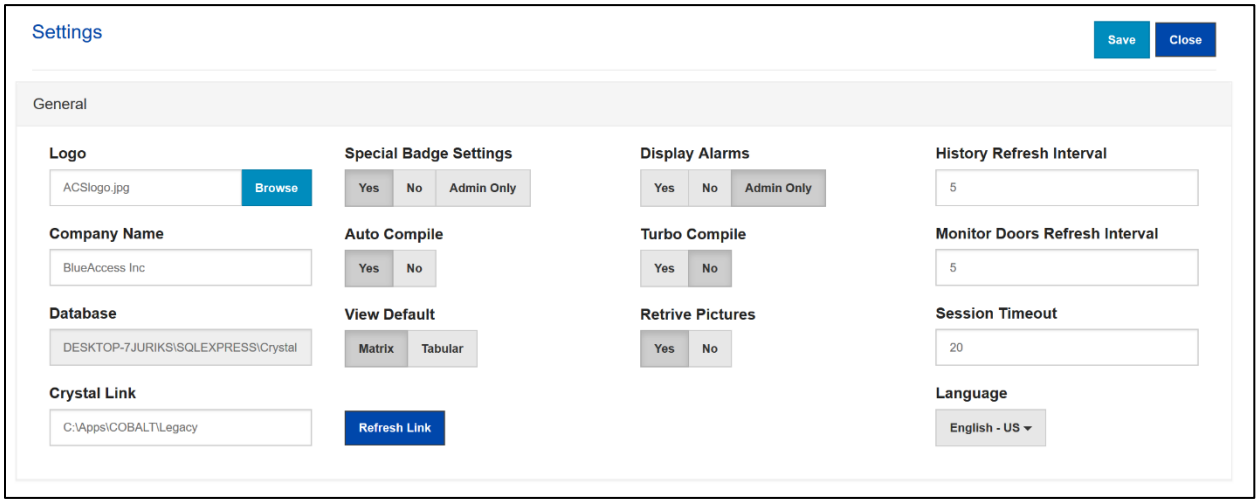


then the meaning is that the associated Cobalt feature is enabled, disabled

or only available to the administrator. The following list of options in System Settings take on these values:

- Special Badge Settings, located on the page for configuring credentials for People.
- Allow Admit All, Allow Lock All, Allow Unlock All, and Allow Normal All; all of which are on the Dashboard Monitor and are located under Global Actions.

General Settings

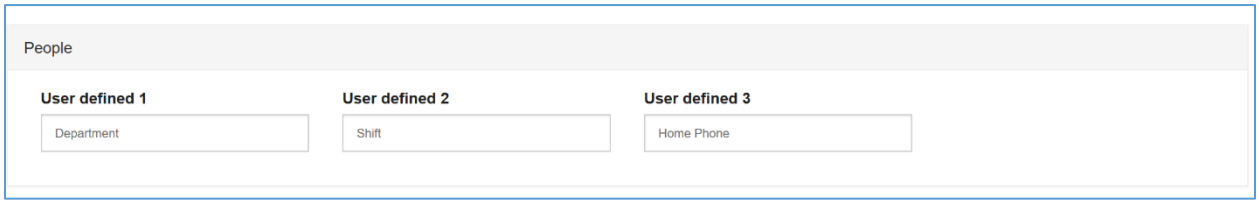


Field	Description
Logo	Allows for a custom logo to appear on the sign-on form.
Company Name	Entry for Customer's Organization
Database	Name of the SQL database for Cobalt
Crystal Link	Folder where the Cobalt server applications are installed
Special Badge Settings	Are the special badge screens available?
Auto Compile	Does the system automatically run a compile, when a database change needs to be pushed to the readers?
View Default	The monitor view's organization of the door display.
Display Alarms	Does the system display alarms to the User?
Turbo Compile	Does the system use the faster Compile process used?
History Refresh Interval	How often is the Monitor's History area refreshed? (Seconds)
Monitor Doors Refresh Interval	How often is the Monitor's Door area refreshed? (Seconds)
Session Timeout	Period of keyboard/mouse inactivity, before Cobalt logs off (Minutes)
Language	The language that Cobalt uses.

Doors Settings

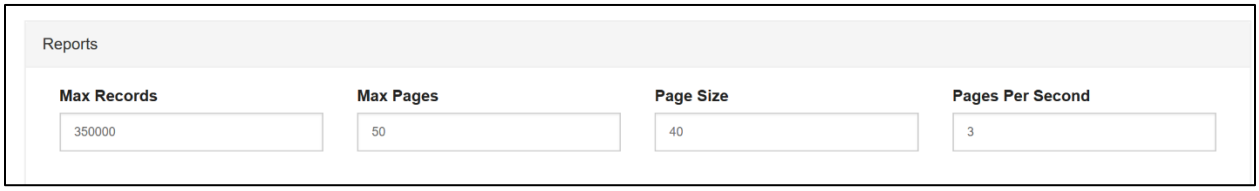
There is a set of “All” buttons on the Monitor View. These settings control if the “All” buttons are available, and if so, are they available to all operators, or just the system administrator.

Personnel User-Defined Fields



This section defines the system-wide titles for the User-Defined fields that can be associated with the application’s personnel.

Report Settings



Report generating can be system resource intensive. These settings give you control over the maximum size of the generate report, and a throttle on how many pages/second are produced.

Conclusion

You have reached the end of the Cobalt User’s Guide and we are really happy that you are still with us. We hope that you now understand how the Cobalt Web-app, services, and Thick-Client work together to form the Blue Access ACS. We are anticipating that when you logon to Cobalt you will immediately feel comfortable with how to navigate around the system and be able to find the function/feature that you are looking for without frustration.