



Operator Manual

For installers and Customers

Version 02

HOSTED ACCESS CONTROL



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CREATING A TIMEZONE - FOR INSTALLERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account
2. If you are an installer, you must have a Customer configured in your system
3. You must understand how timezones are used in the system.
A timezone can be used to define when a door will be locked/unlocked or to define when a door will grant access and when it will deny access.
A timezone represents a standard week (Monday → Sunday)
A default timezone would be locked all week.
When defining a timezone, we add time slots which describe a period of access/unlock time by specifying a start time an end time and a day.

INSTALLER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

- 1 From the home page, click on the Timezones item in the Navigation Menu at the top of the page
- 2 Depending on how many Customers you have registered, you may find it easier to use the 'Find Customers' function. Click on the 'Find Customers' link on the left hand side of the page
- 3 A box should pop-up, in which you can enter a search word
- 4 Click the 'OK' button in the pop-up
- 5 Locate and select the Customer who requires an additional Timezone by clicking on the Customer Context icon 
- 6 Click on the 'Create New' link on the left hand side of the page
- 7 Enter a name for the timezone in the next page. We recommend giving it a name which describes the content e.g. (mon - fri, 09:00 - 17:00). This way, you can easily reuse the timezones without having to open it up to see what it contains
- 8 Select a day, start time and end time during which you would like the door to be unlocked or during which you would like to grant access
- 9 Click the 'Add' button
- 10 Repeat steps 8 and 9 until the timezone definition is complete.
e.g. If you would like Monday to Friday, 09:00 to 17:00 then you would need to add the following:
Day: Monday, Start: 09:00, End: 17:00
Day: Tuesday, Start: 09:00, End: 17:00
Day: Wednesday, Start: 09:00, End: 17:00
Day: Thursday, Start: 09:00, End: 17:00
Day: Friday, Start: 09:00, End: 17:00
- 11 Click the 'Submit' button
- 12 Finished!



CREATING A TIMEZONE - FOR CUSTOMERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account
2. If you are an installer, you must have a Customer configured in your system
3. You must understand how timezones are used in the system.
A timezone can be used to define when a door will be locked/unlocked or to define when a door will grant access and when it will deny access.
A timezone represents a standard week (Monday → Sunday)
A default timezone would be locked all week.
When defining a timezone, we add time slots which describe a period of access/unlock time by specifying a start time an end time and a day.

CUSTOMER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

- 1** From the home page, click on the timezones button  or click on the timezones item in the menu at the top of the page
- 6** Click on the 'Create New' link on the left hand side of the page
- 7** Enter a name for the timezone in the next page. We recommend giving it a name which describes the content e.g. (mon - fri, 09:00 - 17:00). This way, you can easily reuse the timezones without having to open it up to see what it contains
- 8** Select a day, start time and end time during which you would like the door to be unlocked or during which you would like to grant access
- 9** Click the 'Add' button
- 10** Repeat steps 8 and 9 until the timezone definition is complete.
e.g. If you would like Monday to Friday, 09:00 to 17:00 then you would need to add the following:
Day: Monday, Start: 09:00, End: 17:00
Day: Tuesday, Start: 09:00, End: 17:00
Day: Wednesday, Start: 09:00, End: 17:00
Day: Thursday, Start: 09:00, End: 17:00
Day: Friday, Start: 09:00, End: 17:00
- 11** Click the 'Submit' button
- 12** Finished!

CREATING AN ACCESS LEVEL - FOR INSTALLERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account
2. If you are an installer, you must have a Customer configured in your system
3. You must have at least one door configured in the system
4. You must have at least one timezone configured in the system
5. You must understand the use of access levels in an access control system.

An access level is a template defining at what time someone is permitted through a group of doors

You may decide to create an access level called "Employees" which allows access through all main doors between the hours of 9 & 5 and refuse access to all private or secure doors.

You may then decide to create an access level called "Management" which allows 24 hour access through all doors.

INSTALLER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

- 1 From the home page, click on the Access Levels item in the Navigation Menu at the top of the page
- 2 Depending on how many Customers you have registered, you may find it easier to use the 'Find Customers' function. Click on the 'Find Customers' link on the left hand side of the page
- 3 A box should pop-up, in which you can enter a search word
- 4 Click the 'OK' button in the pop-up
- 5 Locate and select the Customer who requires an additional access level by clicking on the Customer Context icon 
- 6 Click on the 'Create New' link on the left hand side of the page
- 7 Enter a name for the access level in the next page
- 8 On this page, there is a list of all the doors which belong to the customer. Each of these needs a timezone associated with it to fully define the access level
- 9 From the drop down box, select a timezone which you would (initially) like to apply to all doors
- 10 For any exceptions to the general rule set in step 9, use the individual drop down boxes to select a different timezone to apply to each of them
- 11 Click the 'Submit' button
- 12 Finished!

CREATING AN ACCESS LEVEL - FOR CUSTOMERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account
2. If you are an installer, you must have a Customer configured in your system
3. You must have at least one door configured in the system
4. You must have at least one timezone configured in the system
5. You must understand the use of access levels in an access control system.

An access level is a template defining at what time someone is permitted through a group of doors

You may decide to create an access level called "Employees" which allows access through all main doors between the hours of 9 & 5 and refuse access to all private or secure doors.

You may then decide to create an access level called "Management" which allows 24 hour access through all doors.

CUSTOMER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

-  From the home page, click on the access levels button  or click on the access levels item in the menu at the top of the page
-  Click on the 'Create New' link on the left hand side of the page
-  Enter a name for the access level in the next page
-  On this page, there is a list of all the doors which belong to the customer. Each of these needs a timezone associated with it to fully define the access level
-  From the drop down box, select a timezone which you would (initially) like to apply to all doors
-  For any exceptions to the general rule set in step 5, use the individual drop down boxes to select a different timezone to apply to each of them
-  Click the 'Submit' button
-  Finished!

CREATING A USER REPORT - FOR INSTALLERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account
2. If you are an installer, you must have a Customer configured in your system
3. You must have at least one user registered in the system in order to run a report on their activity

INSTALLER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

- 1 From the home page, click on the Settings item in the Navigation Menu at the top of the page
- 2 Depending on how many Customers you have registered, you may find it easier to use the 'Find Customers' function. Click on the 'Find Customers' link on the left hand side of the page
- 3 A box should pop-up, in which you can enter a search word
- 4 Click the 'OK' button in the pop-up
- 5 Locate and select the Customer who requires a timesheet report by clicking on the Customer Context icon 
- 6 Click on the 'Reports' link on the left hand side of the page
- 7 Click on the report icon  on the row named "User Activity"
- 8 Select the start date for the report
- 9 Select the end date for the report
- 10 Specify the User you wish to run the report on
- 11 Click the 'Submit' button
- 12 Wait for the report to complete, then the results will be displayed in the web browser.
- 13 You may optionally download the results as a CSV file by clicking the link on the left hand side of the page
- 14 Finished!



CREATING A USER REPORT - FOR CUSTOMERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account
2. If you are an installer, you must have a Customer configured in your system
3. You must have at least one user registered in the system in order to run a report on their activity

CUSTOMER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

-  From the home page click on the Settings item in the menu at the top of the page
-  Click on the 'Reports' link on the left hand side of the page
-  Click on the report icon  on the row named "User Activity"
-  Select the start date for the report
-  Select the end date for the report
-  Specify the User you wish to run the report on
-  Click the 'Submit' button
-  Wait for the report to complete, then the results will be displayed in the web browser.
-  You may optionally download the results as a CSV file by clicking the link on the left hand side of the page
-  Finished!

ADDING USERS - FOR INSTALLERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account
2. If you are an installer, you must have a Customer configured in your system
3. If you wish to assign an access level during this process, then you must have already created the access level
4. If you wish to assign a user group during this process, then you must have already created the user group
5. If you wish to assign a token to the user during this process, then you must either have a desktop reader with keyboard output, or know the token number.
You must also know whether the token will be used on readers with a clock and data output or wiegand output.

INSTALLER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

-  From the home page, click on the users icon  for the Customer account to which you would like to add the new user
-  Click on the 'Create New' link on the left hand side of the page
-  Enter the First Name of the new user
-  Enter the Last Name of the new user
-  Select an Access Level
-  Specify whether this user should be exempt from the Lock Down functionality of the system (i.e. if this user is exempt, they will be permitted access through the doors even when the site is in a lock down state)
-  Assign the user a PIN
-  Assign the user a verification PIN (for use with readers configured as Prox plus PIN)
-  Set a valid from date for the user
-  Set an expiry date for the user
-  Enter the value of the user's token/access card
-  Set the token type of the user's token (this is essential if step 11 is undertaken). If the token will be used on a reader with clock and data output, select clock and data otherwise, select Wiegand
-  Select a user group for the user
-  Enter any additional data into the custom fields provided
-  Click on the Submit button
-  Finished!

NOTES

- A user will not be granted access to any doors during this process unless all of the following steps are completed:
 - Assign the user an access credential, either:
 - a PIN
 - or a Token (and specify the Token Type)
 - or a Token (with Token Type) and a PIN (Token and PIN)
 - Assign the user an access level



ADDING USERS - FOR CUSTOMERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account
2. If you are an installer, you must have a Customer configured in your system
3. If you wish to assign an access level during this process, then you must have already created the access level
4. If you wish to assign a user group during this process, then you must have already created the user group
5. If you wish to assign a token to the user during this process, then you must either have a desktop reader with keyboard output, or know the token number.
You must also know whether the token will be used on readers with a clock and data output or wiegand output.

CUSTOMER INSTRUCTIONS

KEY: ● REQUIRED ● OPTIONAL

- 1 From the home page, click on the users button  or click on the Users item in the menu at the top of the page
- 2 Click on the 'Create New' link on the left hand side of the page
- 3 Enter the First Name of the new user
- 4 Enter the Last Name of the new user
- 5 Select an Access Level
- 6 Specify whether this user should be exempt from the Lock Down functionality of the system (i.e. if this user is exempt, they will be permitted access through the doors even when the site is in a lock down state)
- 7 Assign the user a PIN
- 8 Assign the user a verification PIN (for use with readers configured as Prox plus PIN)
- 9 Set a valid from date for the user
- 10 Set an expiry date for the user
- 11 Enter the value of the user's token/access card
- 12 Set the token type of the user's token (this is essential if step 11 is undertaken). If the token will be used on a reader with clock and data output, select clock and data otherwise, select Wiegand
- 13 Select a user group for the user
- 14 Enter any additional data into the custom fields provided
- 15 Click on the Submit button
- 16 Finished!

NOTES

- A user will not be granted access to any doors during this process unless all of the following steps are completed:
 - Assign the user an access credential, either:
 - a PIN
 - or a Token (and specify the Token Type)
 - or a Token (with Token Type) and a PIN (Token and PIN)
 - Assign the user an access level



ADDING USERS USING ACCESS DENIED EVENTS - FOR INSTALLERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account.
2. If you are an installer, you must have a Customer configured in your system.
3. If you wish to assign an access level during this process, then you must have already created the access level.
4. If you wish to assign a user group during this process, then you must have already created the user group.
5. You must be in contact with a user on site in order to ensure the correct access denied event is used for creating the user.

 **WE RECOMMEND A USER VERIFICATION PROCESS BE FOLLOWED BEFORE GRANTING ACCESS TO A USER OVER THE PHONE.**

INSTALLER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

- 1 From the home page, click on the Sites icon  for the Customer account to which you would like to add a new user.
- 2 If you know exactly where the user has presented/will be presenting their token, then you can navigate to the relevant door before viewing events. This will reduce the number of events you have to sort through to find the one you are looking for.
- 3 Click on the Events icon  for the site (or door) on which the user will be presenting a token.
- 4 Locate the event you wish to use for creating a new user and click on the Unknown Token icon .
- 5 A drop-down menu will be displayed allowing you to assign this token to an existing user, or use the information to create a new user. Select New User.
- 6 Enter the First Name of the new user.
- 7 Enter the Last Name of the new user.
- 8 Set the token type to be either Wiegand or Clock and Data as appropriate (this should match the reader types on which the token will be used).
- 9 Select an Access Level.
- 10 Specify whether this user should be exempt from the Lock Down functionality of the system (i.e. if this user is exempt, they will be permitted access through the doors even when the site is in a lock down state).
- 11 Assign the user a PIN.
- 12 Assign the user a verification PIN (for use with readers configured as Prox plus PIN).
- 13 Set a valid from date for the user.
- 14 Set an expiry date for the user.
- 15 Select a user group for the user.
- 16 Enter any additional data into the custom fields provided.
- 17 Click on the Submit button.
- 18 Finished!

NOTES

- A user will not be granted access to any doors during this process unless they are assigned an Access Level.

ADDING USERS USING ACCESS DENIED EVENTS - FOR CUSTOMERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account.
2. If you are an installer, you must have a Customer configured in your system.
3. If you wish to assign an access level during this process, then you must have already created the access level.
4. If you wish to assign a user group during this process, then you must have already created the user group.
5. You must be in contact with a user on site in order to ensure the correct access denied event is used for creating the user.

 **WE RECOMMEND A USER VERIFICATION PROCESS BE FOLLOWED BEFORE GRANTING ACCESS TO A USER OVER THE PHONE.**

CUSTOMER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

- 1 From the home page, click on the sites button  or click on the Sites item in the menu at the top of the page.
- 2 If you know exactly where the user has presented/will be presenting their token, then you can navigate to the relevant door before viewing events. This will reduce the number of events you have to sort through to find the one you are looking for.
- 3 Click on the Events icon  for the site (or door) on which the user will be presenting a token.
- 4 Locate the event you wish to use for creating a new user and click on the Unknown Token icon .
- 5 A drop-down menu will be displayed allowing you to assign this token to an existing user, or use the information to create a new user. Select New User.
- 6 Enter the First Name of the new user.
- 7 Enter the Last Name of the new user.
- 8 Set the token type to be either Wiegand or Clock and Data as appropriate (this should match the reader types on which the token will be used).
- 9 Select an Access Level.
- 10 Specify whether this user should be exempt from the Lock Down functionality of the system (i.e. if this user is exempt, they will be permitted access through the doors even when the site is in a lock down state).
- 11 Assign the user a PIN.
- 12 Assign the user a verification PIN (for use with readers configured as Prox plus PIN).
- 13 Set a valid from date for the user.
- 14 Set an expiry date for the user.
- 15 Select a user group for the user.
- 16 Enter any additional data into the custom fields provided.
- 17 Click on the Submit button.
- 18 Finished!

NOTES

- A user will not be granted access to any doors during this process unless they are assigned an Access Level.

DELETING USERS - FOR INSTALLERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account
2. If you are an installer, you must have a Customer configured in your system
3. You must have an existing user in the system

INSTALLER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

-  From the home page, click on the users icon  for the Customer account to which you would like to add the new user
-  Depending on how many users this Customer has registered, you may find it easier to use the 'Find Users' function
Click on the 'Find Users' link on the left hand side of the page.
-  A box should pop-up, in which you can enter a search word - e.g. a first name or last name or both
-  Click the 'OK' button in the pop-up
-  Locate the user that you would like to delete
-  Click on the Delete User icon  for the user you wish to delete
-  A box should pop-up asking "Are you sure you want to delete this user?"
Click 'Yes'
-  Finished!

DELETING USERS - FOR CUSTOMERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account
2. If you are an installer, you must have a Customer configured in your system
3. You must have an existing user in the system

CUSTOMER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

-  From the home page, click on the users button  or click on the Users item in the menu at the top of the page
-  Depending on how many users you have registered, you may find it easier to use the 'Find Users' function. Click on the 'Find Users' link on the left hand side of the page
-  A box should pop-up, in which you can enter a search word - e.g. a first name or last name or both
-  Click the 'OK' button in the pop-up
-  Locate the user that you would like to delete
-  Click on the Delete User icon  for the user you wish to delete
-  A box should pop-up asking "Are you sure you want to delete this user?" Click 'Yes'
-  Finished!

BAR USERS - FOR INSTALLERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account
2. If you are an installer, you must have a Customer configured in your system
3. You must have an existing user in the system

INSTALLER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

- 1 From the home page, click on the users icon  for the Customer account to which you would like to add the new user
- 2 Depending on how many users this Customer has registered, you may find it easier to use the 'Find Users' function. Click on the 'Find Users' link on the left hand side of the page
- 3 A box should pop-up, in which you can enter a search word - e.g. a first name or last name or both
- 4 Click the 'OK' button in the pop-up
- 5 Locate the user you would like to bar (they may not be present on the first page)
- 6 Click on the Bar User icon  for the user you wish to bar
- 7 A box should pop-up asking "Are you sure you want to bar this user?"
Click 'Yes'
- 8 Finished!

BAR USERS - FOR CUSTOMERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account
2. If you are an installer, you must have a Customer configured in your system
3. You must have an existing user in the system

CUSTOMER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

-  From the home page, click on the users button  or click on the Users item in the menu at the top of the page
-  Depending on how many users you have registered, you may find it easier to use the 'Find Users' function. Click on the 'Find Users' link on the left hand side of the page
-  A box should pop-up, in which you can enter a search word - e.g. a first name or last name or both.
-  Click the 'OK' button in the pop-up
-  Locate the user you would like to bar (they may not be present on the first page)
-  Click on the Bar User icon  for the user you wish to bar.
-  A box should pop-up asking "Are you sure you want to bar this user?" Click 'Yes'
-  Finished!

CREATING A DOOR ACTIVITY REPORT - FOR INSTALLERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account
2. If you are an installer, you must have a Customer configured in your system
3. You must have at least one door registered in the system in order to run a report on its activity

INSTALLER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

- 1 From the home page, click on the Settings item in the Navigation Menu at the top of the page
- 2 Depending on how many Customers you have registered, you may find it easier to use the 'Find Customers' function. Click on the 'Find Customers' link on the left hand side of the page
- 3 A box should pop-up, in which you can enter a search word
- 4 Click the 'OK' button in the pop-up
- 5 Locate and select the Customer who requires a timesheet report by clicking on the Customer Context icon 
- 6 Click on the 'Reports' link on the left hand side of the page
- 7 Click on the report icon  on the row named "Door Activity"
- 8 Select the start date for the report
- 9 Select the end date for the report
- 10 Specify the door you wish to run the report on
- 11 Click the 'Submit' button
- 12 Wait for the report to complete, then the results will be displayed in the web browser.
- 13 You may optionally download the results as a CSV file by clicking the link on the left hand side of the page
- 14 Finished!

CREATING A DOOR ACTIVITY REPORT - FOR CUSTOMERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account
2. If you are an installer, you must have a Customer configured in your system
3. You must have at least one door registered in the system in order to run a report on its activity

CUSTOMER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

- 1 From the home page click on the Settings item in the menu at the top of the page
- 2 Click on the 'Reports' link on the left hand side of the page
- 3 Click on the report icon  on the row named "Door Activity"
- 4 Select the start date for the report
- 5 Select the end date for the report
- 6 Specify the door you wish to run the report on
- 7 Click the 'Submit' button
- 8 Wait for the report to complete, then the results will be displayed in the web browser
- 9 You may optionally download the results as a CSV file by clicking the link on the left hand side of the page
- 10 Finished!

CREATING A BASIC TIMESHEET (CLOCK IN/ CLOCK OUT) REPORT - FOR INSTALLERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account
2. If you are an installer, you must have a Customer configured in your system
3. You must have at least two doors configured in the system, which must be used as 'clock in' and 'clock out' readers

INSTALLER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

- 1 From the home page, click on the Settings item in the Navigation Menu at the top of the page
- 2 Depending on how many Customers you have registered, you may find it easier to use the 'Find Customers' function. Click on the 'Find Customers' link on the left hand side of the page
- 3 A box should pop-up, in which you can enter a search word
- 4 Click the 'OK' button in the pop-up
- 5 Locate and select the Customer who requires a timesheet report by clicking on the Customer Context icon 
- 6 Click on the 'Reports' link on the left hand side of the page
- 7 Click on the report icon  on the row named "Timesheet"
- 8 Select the start date for the report
- 9 Select the end date for the report
- 10 Specify the door used as the 'clock in' door
- 11 Specify the door used as the 'clock out' door
- 12 Click the 'Submit' button
- 13 Wait for the report to complete, then the results will be displayed in the web browser.
- 14 You may optionally download the results as a CSV file by clicking the link on the left hand side of the page
- 15 Finished!

CREATING A BASIC TIMESHEET (CLOCK IN/ CLOCK OUT) REPORT - FOR CUSTOMERS

PREREQUISITES/ASSUMPTION

1. You must have a working operator account
2. If you are an installer, you must have a Customer configured in your system
3. You must have at least two doors configured in the system, which must be used as 'clock in' and 'clock out' readers

CUSTOMER INSTRUCTIONS

KEY:  REQUIRED  OPTIONAL

- 1 From the home page click on the Settings item in the menu at the top of the page
- 2 Click on the 'Reports' link on the left hand side of the page
- 3 Click on the report icon  on the row named "Timesheet"
- 4 Select the start date for the report
- 5 Select the end date for the report
- 6 Specify the door used as the 'clock in' door
- 7 Specify the door used as the 'clock out' door
- 8 Click the 'Submit' button
- 9 Wait for the report to complete, then the results will be displayed in the web browser.
- 10 You may optionally download the results as a CSV file by clicking the link on the left hand side of the page
- 11 Finished!