



Access Dashboard User's Guide

This document will guide the Access Dashboard Admin through setting up and managing Access Devices, People, Groups and Schedules.

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Overview

ESI Access Dashboard enables you to manage People and Devices associated with premises access for both eSIP Evolution and eCloud Service.

Who should use Access Dashboard?

Office administrators where building access security is important would find this tool vital.

Why use Access Dashboard?

ESI access devices can be managed without the Access Dashboard but it would have to be done by connecting to each device one at a time. This also means people and schedules would have to be managed at each device individually. This can consume a great deal of time and cause inconsistencies between devices.

Getting Started

There are six main steps that must be accomplished to complete your ESI Access installation and setup.

1. Implementation Planning – user database size, time schedules and device requirements are vital to a successful deployment
2. [Add the access devices to the network](#) – getting the devices IP address once on the network is critical to the remaining setup
3. [Directly connect to the device](#) – using the devices IP address you'll want to ensure certain settings are correct for a smooth install
4. [Create your Access Dashboard account](#) – ESI personnel will take care of this for you. The administrator of the account will receive an email to create a password and login.
5. [Login to Access Dashboard](#) – here you can add People, specific devices, schedule and time plans.
6. **Assign access devices to an extension on the eSIP or eCloud PBX** – this is important for the device to take and receive audio.

Preparing the Access Devices

The Access Device must first be configured to communicate with the ESI Access Dashboard. This section is typically done by the ESI Certified Partner.

Implementation Planning

To begin answer the following question to see if ESI Access Dashboard fits your access control needs.

Total number of employees with access credentials (RFID Cards and PINs)?

- ❖ AC20, AC30v, and AC32v support up to 150 employees. Each employee may have a RFID card and PIN.
- ❖ AC64v supports up to 450 employees. Each employee may have a RFID card and PIN.

Retrieving the Device IP Address

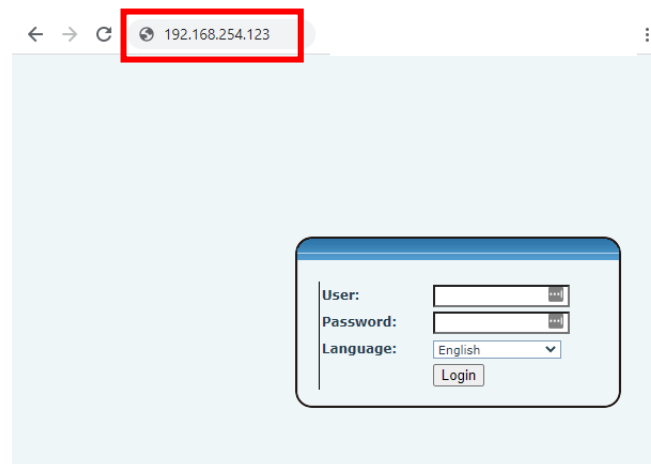
To begin

1. Add the devices to the network.
2. Make note of the device's MAC address (on back of device) and IP address. Here's how you get the IP address:
 - AC20 and AC30v press the pound (#) button for 3 seconds. The IP address will be read back to you.
 - AC32v and AC64v press the call button for 3 seconds. Once you hear beeps press the call button again. The IP address will be read back to you.

Connecting Directly to the Device

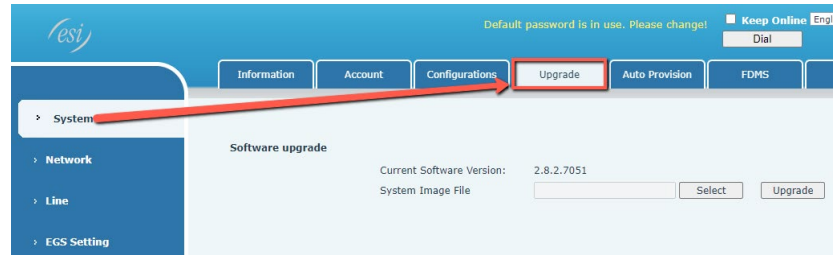
Now that you have this information you can access the device for configuration to the Access Dashboard.

1. Enter the IP address in your browser's URL field and Enter.
2. A login screen will appear. Ask ESI Support for the default password.



Important: Once logged into the access device **DO NOT** add users, groups, schedules or time plans. You'll do all this from the Access Dashboard. Programming the device directly will have negative effects on the Access solution. If you've already done programming at the device, factory default the device. This will save you much frustration going forward.

3. For the best performance the device should be on the latest available firmware.
 - eSIP PBX – the latest firmware can be found on ESI Academy, which is available to ESI Certified Partners
 - eCloud PBX – the latest firmware is on the Cloud server. A simple reboot of the device will initiate the upgrade.



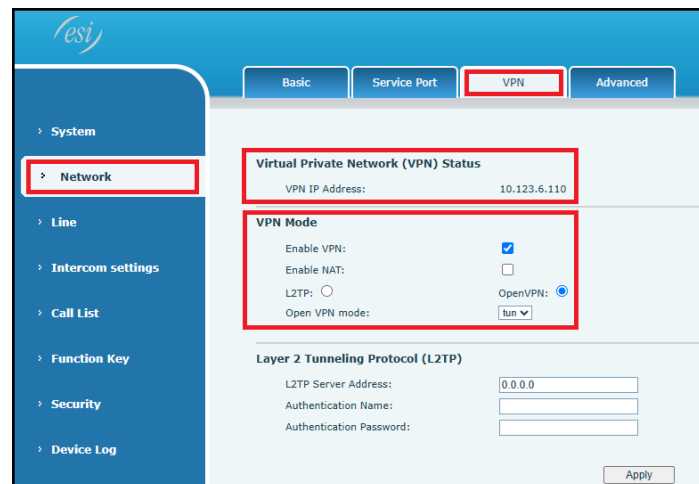
Enabling the VPN

1. eCloud- VPN is enabled by eCloud provisioning file. eCloud customers who are not using Access Dashboard, contact ESI support to have VPN disabled in the provisioning file.
2. eSIP - Select Network in the left navigation panel then select the VPN tab.
3. Ensure “Enable VPN” is selected.

Make sure “OpenVPN” is selected.

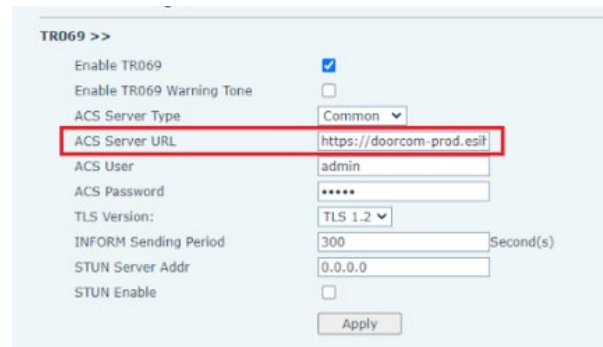
Select Apply

4. The VPN IP Address should change to something other than all 0's.



Confirm the ACS Server URL

1. Navigate to System>Auto Provision.
2. Select TRO69.
3. Verify that the ACS Server URL is `https://doorcom-prod.esihs.net:7547`.



The screenshot shows the configuration page for TRO69. The 'ACS Server URL' field is highlighted with a red box. The configuration includes the following fields and values:

Field	Value
Enable TRO69	<input checked="" type="checkbox"/>
Enable TRO69 Warning Tone	<input type="checkbox"/>
ACS Server Type	Common
ACS Server URL	https://doorcom-prod.esihs.net:7547
ACS User	admin
ACS Password	*****
TLS Version	TLS 1.2
INFORM Sending Period	300 Second(s)
STUN Server Addr	0.0.0.0
STUN Enable	<input type="checkbox"/>

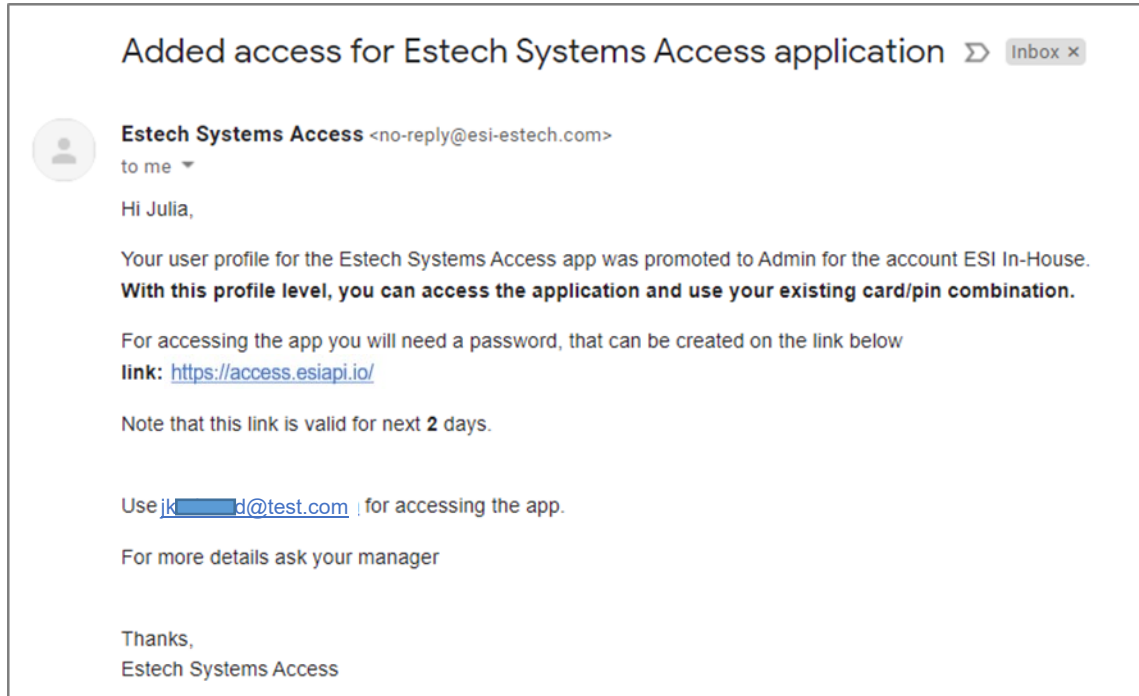
An 'Apply' button is located at the bottom right of the configuration area.

The Access Device should now be able to communicate with the ESI Access Dashboard. Login to the Access Dashboard to add People, specific devices, schedules and time plans.

Your Access Dashboard Account

Accessing your account

Your Account will be created for you by ESI. If you are a Reseller or Admin level user, you will receive an email that will provide a link, where you can create your password. Once that step is complete you can login to the Dashboard. (ESI personnel cannot create or reset passwords.)



Logging In

1. Go to access.esiapi.io
2. The admin will log in with their credentials provided by ESI.

A screenshot of a login form on a dark blue background. It has fields for "Email" and "Password". Below the fields is a "LOG IN" button. At the bottom, there is a link for "Forgot password?" and the text "Version: 1.4.35".

Forgot Password

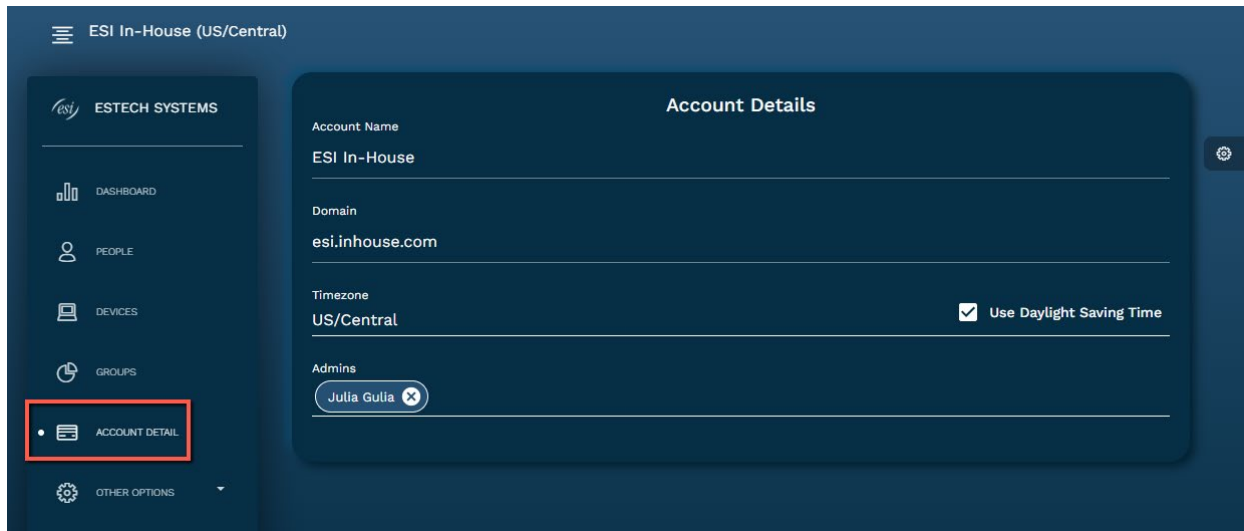
1. If you've forgotten their password, select Forgot Password.
2. Enter in the email address and select Send Reset Password Link. The password reset link will be sent to your email if it matches an account on the system and the screen will be redirected to the login page.
3. By default you'll land on the Activity view when logging in.

A screenshot of a "Forgot Password" form on a dark blue background. It has a field labeled "Enter email address". Below the field is a button labeled "SEND RESET PASSWORD LINK" which is highlighted with a red rectangle. At the bottom, there is a link for "Go to login page" and the text "Version: 1.4.35".

Note: ESI personnel cannot create or reset passwords.

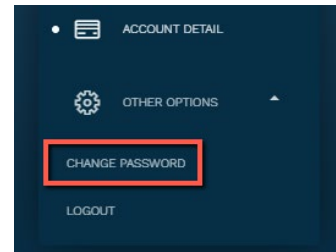
Account Details

As an administrator you can edit any of this information except the Domain name. Note: Daylight savings time is not automatic and must be manually changed.



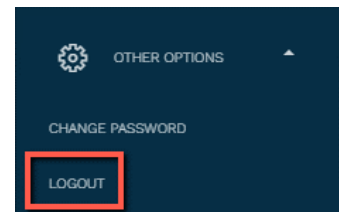
Change password

To change password, click on the account located on the left side of the screen and click Change Password.



Logout

To log out, click on the account located on the left side of the screen and click Logout.



Dashboard View

Dashboard shows the aggregated activity of all the devices in one view. At the top of the screen you will see how many devices are active as well as the number of successful and failed entries for the time period. A graph is displayed followed by a log of all device activity.



People

People consists of anyone associated who needs access to your business [building] or internal secure areas like a network closet. This could be a full time employee, seasonal worker, contractor, vendor, or maintenance staff. A person can use a RFID card, a PIN number or both, depending on the access device model, to gain entry.

As shown in the screen below the following information associated with each person is displayed. Use the search field at the top of the page to find a specific person.

Selecting the down arrow (▼) next to a specific a person will show their access log history.

ESI In-House (US/Central) Upload CSV + Add a Person

ESTECH SYSTEMS

Search...

PEOPLE

	FIRST NAME	LAST NAME	ROLE	ACTIONS
▼	Beckl	Lambchop	User	
▼	Billy	B	User	
▼	Brandon	Crist	User	
▼	Jason	Cowboy	User	
▼	Jimbo	S	User	
▼	Julia	Gulia	Admin	
▼	Mario	V	User	

Version: 1.4.35

You can add People in two ways

- Individually, one at a time
- In bulk using the Import template

Important:

- Special characters (& @ # - , etc) are not accepted in the names of People
- **Once logged into the access device DO NOT add users, groups, schedules or time plans. You'll do all this from the Access Dashboard.** Programming the device directly will have negative effects on the Access solution. If you've already done programming at the device, factory default the device. This will save you much frustration going forward.
- **DO NOT alter the CSV template by adding or renaming column headings. DO NOT use a different CSV template that the one provided in the Access Dashboard.**
- **Once you've added People to the Dashboard, you are not done. You MUST add the people to a Group.** Without this step the device doesn't know which reader and time frames are approved for that individual.

Adding a Person

To add a person

1. Select People
2. Click **+Add a Person** in the upper right corner. First Name & Last Name
 - Email Address – the email address must be unique.
 - Mobile Number – this is not a required field.
 - Card ID – the number printed on the RFID badge
 - Pin – numeric 4-6 digit. Duplicate PINs are not accepted.
 - Dual Authorization –enabling this selection means the user will be required to use their RFID card and PIN at the same time for access entry. Note: Only supported on AC20, AC30v, and AC32v)
3. Remember to Click **Save** when done.

The 'Person Info' form is displayed on a dark blue background. It contains the following fields and options:

- First Name ***: Becki
- Last Name ***: Lambchop
- Email Address ***: b...@test.com
- Mobile Number**: (empty)
- Card ID**: 1141991025
- Pin**: 1025
- Groups**: A dropdown menu showing 'Daytime M-F'.
- Dual Authorization**: A checkbox labeled 'Dual Authorization (requires Card ID and PIN for access)'.
- Admin**: A checkbox.
- Reseller**: A checkbox.
- Close**: A button at the bottom right.

Note: The Groups field is explained in the Groups section of this document. When a person is added to group in the Groups tab their personal details view (shown above) will reflect which groups they were added to.

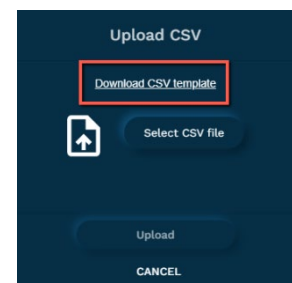
Bulk (CSV) Import for People

1. To import a CSV file select Upload CSV from the upper right hand corner of the People screen.



2. Select Download CSV template. Only use this template. The import will not be successful if using a template or CSV file you created.

Important: Do not alter the CSV template by adding or renaming column headings. Do not use a different CSV template other than the one provided in the Access Dashboard.



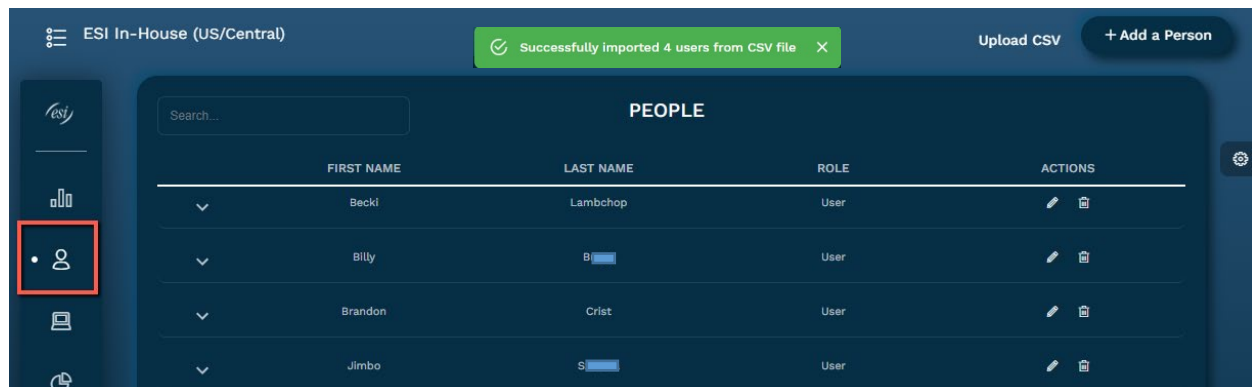
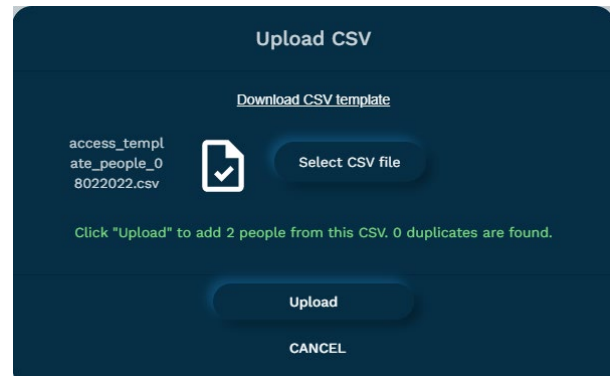
- a Once downloaded, input the information for each column and save as .csv. Select the Select CSV file. The first four rows of the template show examples of proper data entry. Simply delete these four rows before uploading to the account.

	A	B	C	D	E	F	G	H
1	#	First	Last	Email	Phone	CardId	Pin	Dual Auth
2	1	Laura	Example	laura@example.com	3.81E+09	131231	disable	
3	2	Craig	Example	craig@example.com	1.11E+09		disable	
4	3	Mary	Example	mary@example.com	3.33E+08	1223412	enable	
5	4	Jamie	Example	jamie@example.com			disable	
6	5						disable	
7	6							
8	7							

- b All columns must filled in except for the Phone field, which can remain blank. Once completed, save the file (as a CSV file). You can save the file under a different name than the default (*import-users-template.csv*), if preferred, but it must remain a CSV file.

A	B	C	D	E	F	G	H
#	First	Last name	Email	Phone	CardId	Pin	Dual Auth
1	Julia	Gulia	jgulia@test.com		1928379876	9847	disable
2	Brandon	Crist	b[redacted]@test.com		1928374650	1047	disable
3	Mario	V[redacted]	m[redacted]@test.com		1928371234	8465	enable
4	Jimbo	S[redacted]	j[redacted]@test.com		1928372345	2395	disable
5	Billy	B[redacted]	b[redacted]@test.com		1928374567	3957	enable
6	Becki	Lambchop	b[redacted]@test.com		1928376789	1957	disable
7							
8							

3. Now that the your file is created
 - a Go back to the People tab in the Dashboard and select Upload CSV.
 - b Click "Select CSV file" and find and select the file you created in the previous steps.
 - c You'll get a confirmation that the file is "good". If it isn't you'll receive a red warning.
 - Be sure to check out the Troubleshooting section in this document for important tips on having a successful import.
 - d Click "Upload".
 - e Once the upload is complete the People tab will be populated.



4. You can repeat this process at any time to add new employees.

Deleting a Person

To delete a person

1. Select People and locate the person you would like to delete.
2. Click the trash can icon for the desired person and confirm in the popup.

PEOPLE			
Search...			
	FIRST NAME	LAST NAME	ROLE
▼	Becki	Lambchop	User
▼	Billy	B	User

Editing a Person

To edit people information

1. Select People and locate the person you would like to edit.
2. Click the pencil icon and modify the desired fields in the popup.
3. Don't forget to click Save.

PEOPLE			
Search...			
	FIRST NAME	LAST NAME	ROLE
▼	Becki	Lambchop	User
▼	Billy	B	User

Adding Additional Admin Users

Once the initial Admin has added People to the Dashboard they can select other People to be admins. Keep in mind that Admins can make changes to people, devices and access schedules.

To add an admin

1. Select the desired person in the People tab
2. Check the Admin box then click Save.
3. Check "Update" and then Done.
4. The user will receive an email telling them their Access Dashboard status has been promoted. They'll follow the steps in the email to get access to the Dashboard and create a password.

Person Info

First Name *

Last Name *

Email Address *

Card ID

Mobile Number

Pin

Groups

☐ Dual Authorization (requires Card ID and PIN for access)

☒ Admin

☐ Reseller

Close

Devices

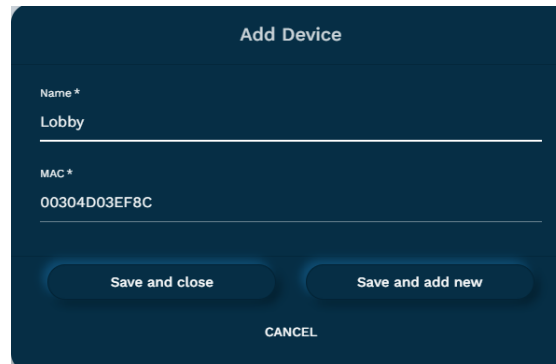
Supported access devices consist of the following – AC20, AC30v, AC32v, and AC64v.

Adding a Device to the Dashboard

Now that the access devices have been added to the network, it's time to add them to the dashboard. Please contact ESI technical support to add new devices to your account.
















(ESI personnel only)

1. In the Access Dashboard go to Devices in the left navigation panel and click Add a Device in the upper right corner.
2. In the popup window enter
 - The device's MAC address, which is located on the back of the device.
 - The desired name of the device (i.e., Lobby, Employee Entrance, Network Room)

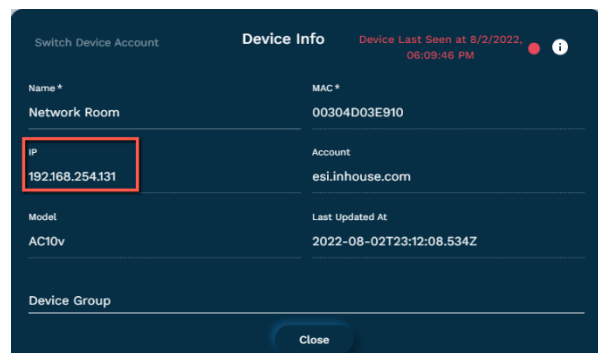


The 'Add Device' popup window is a dark blue modal. It contains two text input fields. The first is labeled 'Name *' and has 'Lobby' entered. The second is labeled 'MAC *' and has '00304D03EF8C' entered. At the bottom, there are three buttons: 'Save and close', 'Save and add new', and 'CANCEL'.

3. After clicking Save the device will appear under Devices as Offline. Give the device at least 15 minutes to communicate with the network. Once it does its status will change to Online.

DEVICES					
Search...	DEVICE ACTIVE	DEVICE NAME	MAC ADDRESS	LAST UPDATED AT	ACTIONS
▼	Unregistered	Employee Entrance	00304d03ec24		    
▼	Online	Lobby	00304d03eb7c	8/2/2022, 06:11:29 PM	    
▼	Offline	Network Room	00304D03E910	8/2/2022, 06:09:46 PM	    

4. Viewing the Edit window for the device you'll now see the IP address field is no longer empty.
5. If your device continues to show offline ensure that the **Preparing the Access Devices** section at the beginning of this document was completed. **Otherwise the device will remain offline.**



The 'Device Info' edit window is a dark blue modal. It has a title bar with 'Switch Device Account' and 'Device Info'. Below the title bar, there are several fields: 'Name *' (Network Room), 'MAC *' (00304D03E910), 'Account' (esi.inhouse.com), 'Model' (AC10v), and 'Last Updated At' (2022-08-02T23:12:08.534Z). The 'IP' field is highlighted with a red box and contains the value '192.168.254.131'. At the bottom, there is a 'Device Group' field and a 'Close' button.

Deleting a Device

To delete a device

1. Select Devices.
2. Click Delete (trashcan) on the desired device and confirm in the popup window.



Editing a Device

The only editable fields in the Device edit screen is the Name and MAC address. The device group information will automatically appear when groups are setup under the Group tab. The remaining fields in the edit window are automatically filled in based on the network and communication with the ESI access server.

DEVICE ACTIVE	DEVICE NAME	MAC ADDRESS	LAST UPDATED AT	ACTIONS
Online	AC30v 192.168.254.126	00304d03eb9a	7/21/2022, 03:50:41 PM	

Switch Device Account

Device Info

Device Last Seen at 8/2/2022, 06:09:46 PM

Name *	MAC *
Network Room	00304D03E910
IP	Account
192.168.254.131	esi.inhouse.com
Model	Last Updated At
AC10v	2022-08-02T23:12:08.534Z
Device Group	

Close

Groups & Schedules

Important: Remember that Groups are required. Without this step the device doesn't know which reader and time frames are approved for that individual.

A group is a collection of specific People based on how they access the building or certain areas. Therefore it may not be the same as the Departments you have created in the PBX. In the Groups tab you are creating two things – **a group of people and the access schedule associated with them.**

For example you may only want employees to have access to the building between 7am – 6pm. But for especially secure rooms that contain sensitive information like a network room, pharmaceutical closet, or file room you may want to restrict access to only a small group of employees during a specific time range. Also consider temporary employees, janitorial staff, and vendors who may need access to your facility at time when the company is not open for business.

Key Notes

- Special characters (& @ # - , etc) are not accepted in the names of Groups.
- Before adding Groups to Access Dashboard ESI strongly recommends taking a moment to think about who accesses your building and protected spaces, when and where. Writing this down will help you easily add the information to Access Dashboard.
- A person (People) can be added to more than one group but use **caution**. If those groups have overlapping schedules and there's a loss of communication to the Access database or the network then only one of the schedules that employee belongs to will be present in the reader and usable.

When thinking about my own [fake] company I came up with the following list.

Scenario	Group Name	Devices	Group Schedule
Employees who work from 8a-5p, M-F. They all use the back door entrance and sometimes arrive as early as 7:30a.	Employees 7:30a-5p	The one named "Back Door"	8a-5p, M-F
Executive, Facility and IT staff that need to access the building at any time through any access device. <i>Note: Because they have 24/7 access do not add this special group of people to the Employees 7:30-5 group. You want to avoid employees in more than one group.</i>	24/7 Group	All devices	24/7
We have a cleaning crew that comes in Tues (6p-10p) and Saturdays (9a – 1p). They use on the back door entrance.	Cleaning Crew	The one named "Back Door"	Tues (6p-10p) Saturdays (9a – 1p) This can go in a single schedule. No need to make two groups.
There's a group of employees that come in every other Saturday. They use the back door and are present from 8a – 12p	Employees Saturday	The one named "Back Door"	Every other Saturday (8a-12p)
There is a shipping and receiving group as well that can sometimes stay as late as 7pm. They need the ability to leave and come back past 5pm. <i>I can do 2 things – update the employee 7:30-5 schedule to 7:30a-7p assuming it would not affect security if the other employees can get in the build past 5pm. If that's not acceptable create a new group that's for "after hours"</i>	Employees 5p-7p	The one named "Back Door"	5p-7p, M-F

Creating a group

To create a group

1. Select Groups and then click **Add a Group** in the upper right of the screen.
2. In the popup enter the appropriate information.
 - a You'll want the name to be somewhat short but meaningful so when seeing it you'll know which group of people it covers.
 - b If a person or device doesn't appear in the drop down list then those items have not been added under their respective tabs – People, Devices. You can finish your Group setup and these items in later, when they're setup.
 - c Notice there's a 24/7 Access checkbox directly over "Sunday". Checking this is preferred opposed to entering 24hrs for each day.
 - d Only one schedule can be applied for each group. In the rare instances where a single person has more than one schedule (i.e., M-F 8-5 and Sat 10-12) you'll need to create a second group for those that come in on Saturdays from 10-12.
3. Don't forget to Save.

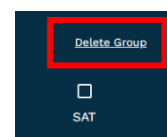
SUN	MON	TUE	WED	THU	FRI	SAT
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	From 07:00 AM	From 07:00 AM	From 07:00 AM	From 07:00 AM	From 07:00 AM	
	To 05:00 PM	To 05:00 PM	To 05:00 PM	To 05:00 PM	To 05:00 PM	

Editing a Group

Select the desired group in the left sub-panel and make the necessary changes. Don't forget to Save.

Deleting a Group

Select the desired group in the left sub-panel and click Delete Group. Don't forget to Save. And keep in mind that people in the deleted group will not have access unless they are already associated with a different group or a new group is created.



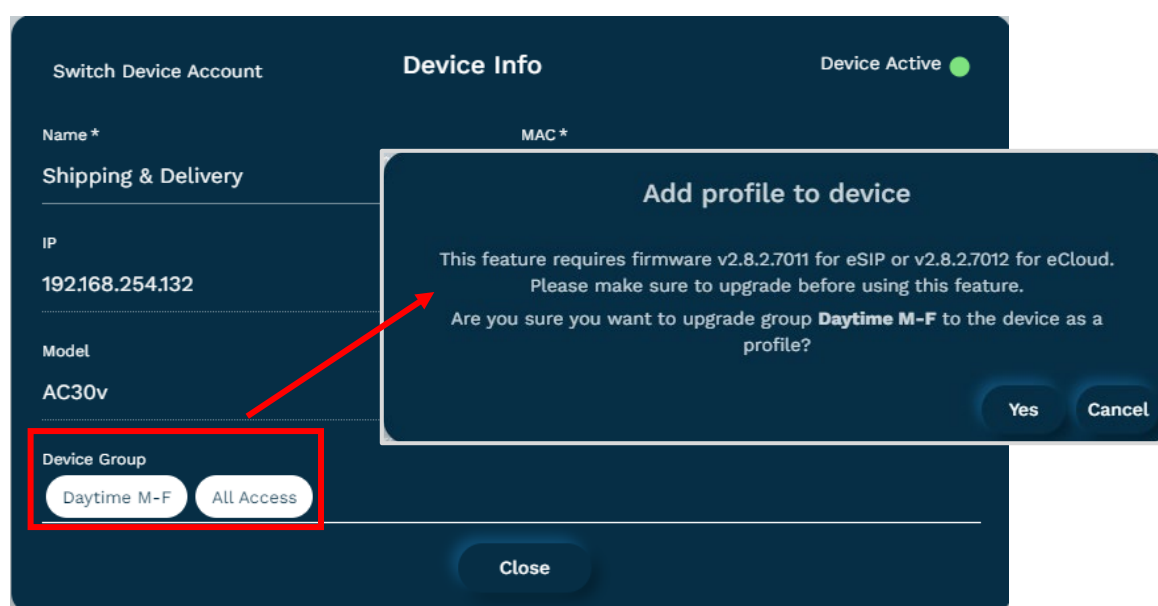
Device Profiles (for Groups and Schedules)

You can add a Group and its schedule to the device as a profile. This will keep the Group and its Schedules on the device. The benefit is that if there is a loss of connection between the reader and the Access database the schedules are still accessible [on the reader].

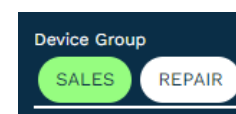
Note: A single reader can support only four profiles, therefore four schedules. You can create more schedules but only four of those can be used for the profile feature.

Creating a Profile

1. Go to Devices and click edit on the desired device.
2. Click once on the desired device group name, which will present a pop up window.
3. Choose 'Yes' which will create the Profile. There's nothing else to set or save.

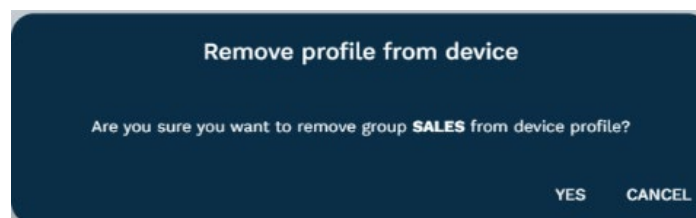


You'll see a green success notification and the chosen schedule for that Group will turn green. This way you can tell which Groups are using the Profile feature.



Removing a Group from Profile

Go through the same process for adding the Profile but when clicking on the green Device Group you'll be asked remove the profile. Choose "Yes" and you're done.



Activity Logs

There are three places in Access Dashboard to view access activity logs.

- Dashboard tab – The main home view shows very recent logs for all devices and all users. This is the only activity log than can be exported.
- Devices tab – click on the down arrow located to the far left of the desired device. When clicked the section will expand to show all logs for that reader.
- People tab – click on the down arrow located to the far left of the desired person. When clicked the section will expand to show all logs for that person.

Dashboard View



Device View

Search

DEVICES

DEVICE ACTIVE

DEVICE NAME

MAC ADDRESS

LAST UPDATED AT

ACTIONS

Online

Lobby

00304d03eb7c

8/4/2022, 12:01:15 PM

Access history

PERSON NAME

ACCESS TIME

ACCESS TYPE

STATUS


SNAPSHOT

Unknown User

04 Aug @ 11:27 AM CDT

PIN NUMBER

FAILURE




Unknown User

04 Aug @ 11:27 AM CDT

PIN NUMBER

FAILURE




Becki Lambchop

04 Aug @ 11:26 AM CDT

ACCESS CARD

SUCCESS




Unknown User

04 Aug @ 11:26 AM CDT

ACCESS CARD

FAILURE



People View

Search...

PEOPLE

FIRST NAME	LAST NAME	ROLE	ACTIONS
Becki	Lambchop	User	<div><div></div><div></div></div>

Access history

DEVICE NAME	ACCESS TIME	ACCESS TYPE	STATUS	SNAPSHOT
Shipping & Delivery	04 Aug @ 11:03 AM CDT	ACCESS CARD	FAILURE	<div><div></div></div>
Lobby	04 Aug @ 11:02 AM CDT	ACCESS CARD	SUCCESS	<div><div></div></div>
Shipping & Delivery	04 Aug @ 11:02 AM CDT	ACCESS CARD	FAILURE	<div><div></div></div>
Lobby	04 Aug @ 09:33 AM CDT	ACCESS CARD	SUCCESS	<div><div></div></div>

Time Plan (aka Door Unlock Schedule)

A door unlock schedule is different than a group schedule. Setting a time plan will leave a door unlocked based on a specific date and time. A good example of this is a lobby or customer entrance, where you want the door to remain open during business hours. The same reader can have both a time plan and a group schedule.

Important:

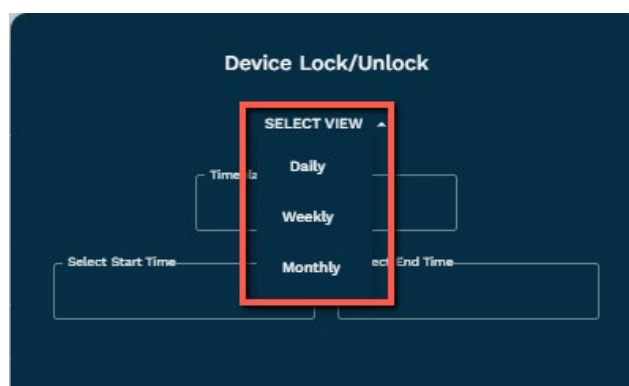
- Special characters (& @ # - , etc) are not accepted in the names of Time Plans.

Creating a time plan

1. In the Devices tab, locate the desired device and click on the clock icon.



2. Select a device lock/unlock schedule from the drop down list. Choose daily, weekly or monthly.



Daily schedule

Using this option means the schedule will take effect every day of the year, except specific inactive dates that you choose.

- Enter the timeplan name and the start and end time.

For instruction on inactive dates see the **Selecting Inactive Dates** section of this document.

A screenshot of the 'Device Lock/Unlock' form. The 'DAILY' option is selected in the dropdown menu, which is highlighted with a red rectangular box. Below the dropdown, there is a 'Timeplan Name' input field with the text 'Office Hours'. There are also input fields for 'Select Start Time' (08:00 AM) and 'Select End Time' (05:00 PM). Below these, there is a section for 'Select inactive dates' with a date picker showing '03/16/2022' and a list of 'Selected inactive dates' including '2022.3.17', '2022.4.17', '2022.5.30', and '2022.7.4'. At the bottom of the form, there are 'Save' and 'CANCEL' buttons.

Weekly schedule

Using this option means the schedule will take effect for each day of the week and time frame you selected.

- Enter the time plan name.
- Set the start and end times.
- Ensure the slider button is set to Active Week Days. Then choose the days of the week.
 - If the time ranges are different for specific days then you'll need different time plans.

For instruction on inactive dates see the **Selecting Inactive Dates** section of this document.

Device Lock/Unlock

WEEKLY ▾

Timeplan Name
Office Hours

Select Start Time 08:00 AM ⓘ Select End Time 05:00 PM ⓘ

Inactive dates ☒ Active Week Days

☐ SUN ☒ MON ☒ TUE ☒ WED ☒ THU ☒ FRI ☐ SAT

Save

CANCEL

Monthly schedule

Using this option means the schedule will take effect for the selected day of the month, each month of the year. For example if you choose the 4th day of the month, the schedule will take effect every 4th day of the month.

- Enter the time plan name.
- Set the start and end times.
- Ensure the slider button is set to Active Week Days. Then choose the days of the month.
 - If the time ranges are different for specific days then you'll need different time plans.

For instruction on inactive dates see the **Selecting Inactive Dates** section of this document.

Device Lock/Unlock

MONTHLY ▾

Timeplan Name
Office Hours

Select Start Time 08:00 AM ⓘ Select End Time 05:00 PM ⓘ

Inactive dates ☒ Active dates

Su Mo Tu We Th Fr Selected active dates:
1 2 3 4 5 Day 1
6 7 8 9 10 11 12 Day 15
13 14 15 16 17 18 19 Day 30
20 21 22 23 24 25 26
27 28 29 30 31

Save

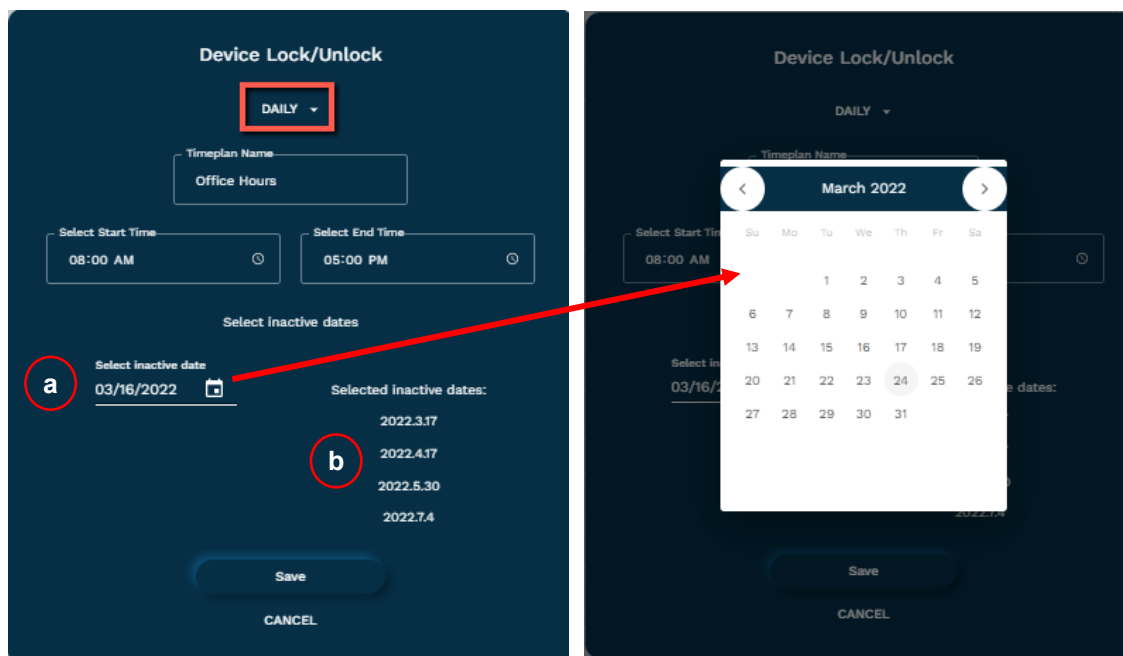
CANCEL

Selecting Inactive Dates (AC20, AC30v, and AC32v Only)

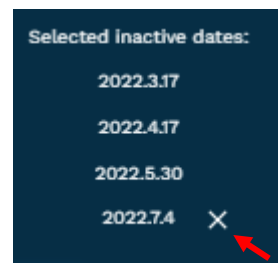
- If there are specific dates where you want the unlock schedule to be ignored or inactive, choose those dates by clicking on the calendar field. The example below is using the Daily schedule. For the Weekly or Monthly schedule simply ensure the button is set for Inactive Dates.



- Once the desired date is chosen it will appear in the Inactive list.



- To remove an inactive date, select that date in the list and click 'X'.



Viewing Created Time Plans

1. In the Devices tab, locate the desired device and click on the eye icon.
2. The timeplan will appear with its details. If the timeplan need to be edited you'll need to delete it and recreate the timeplan.



Deleting a Time Plan

1. In the Devices tab, locate the desired device and click on the eye icon.
2. Click on the trash can to delete.

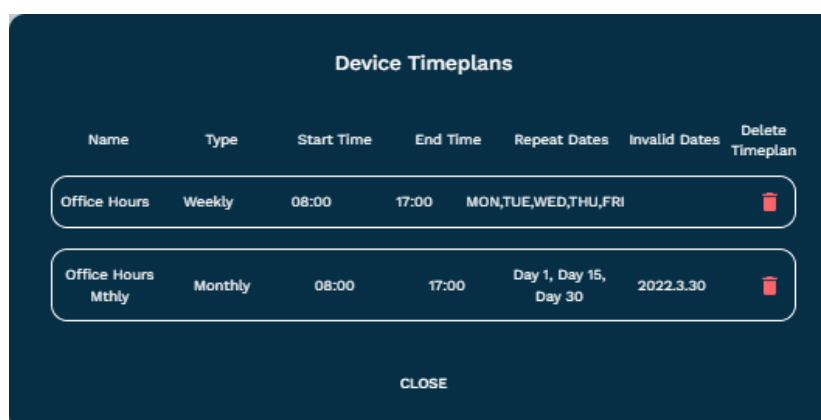





Image Snapshot

Image snapshot provides a static image of who is in front of the access device's camera when a user/visitor is using the access device. The purpose of image snapshot is to allow admins or other Access Dashboard users the ability to verify that the person using their credentials (PIN, RFID card) to gain access into the building is really the correct person.

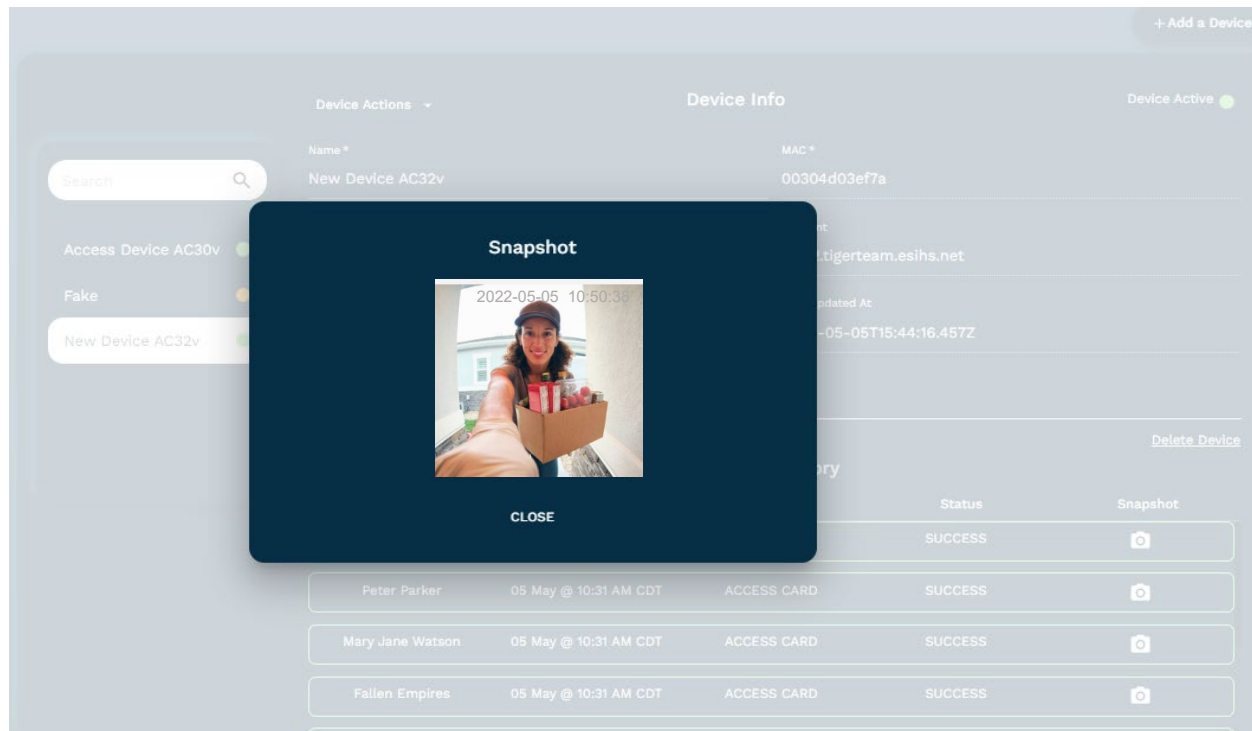
There are three scenarios in which a snapshot is created

1. The user enters an access PIN at the reader to gain entry
2. The user scans their RFID card at the reader to gain entry
3. The employee uses the door unlock code from their phone to unlock the door for a visitor.

To view the image simply login to the Access Dashboard and go to the desired access log entry. Click on the camera icon associated with the log entry.

Access history				
Person Name	Access Time	Access Type	Status	Snapshot
QA ESI Admin	05 May @ 10:32 AM CDT	ACCESS CARD	SUCCESS	
Peter Parker	05 May @ 10:31 AM CDT	ACCESS CARD	SUCCESS	
Mary Jane Watson	05 May @ 10:31 AM CDT	ACCESS CARD	SUCCESS	

The image will appear in a popup window as shown below.



Setup

1. Login to the Access device via the IP Address.
2. Enter the login credentials
3. Go to the Intercom Settings tab on the left

4. Choose the Camera Settings tab at the top
5. In the SnapShot Section set the following
 - a. **Sever Url:** <https://almanac.esiapi.io:31000/snapshots/snapshots/<MAC address>>
 - i. Where MAC address is that of the reader and contains no colons.
Ex: <https://almanac.esiapi.io:31000/snapshots/snapshots/00304d04ec46>
 - b. **Snapshot By Relay:** Check which Relay to trigger SnapShot
 - c. **Snapshot By Input:** Check which Input to trigger SnapShot (i.e. Exit button to unlock the door)
 - d. **Snapshot By State:** Check which Call State to trigger SnapShot. At a minimum Calling should be selected
 - e. **Snapshot By Motion Detection:** Unchecked
 - f. **Username and Password** = blank

Helpful Tips

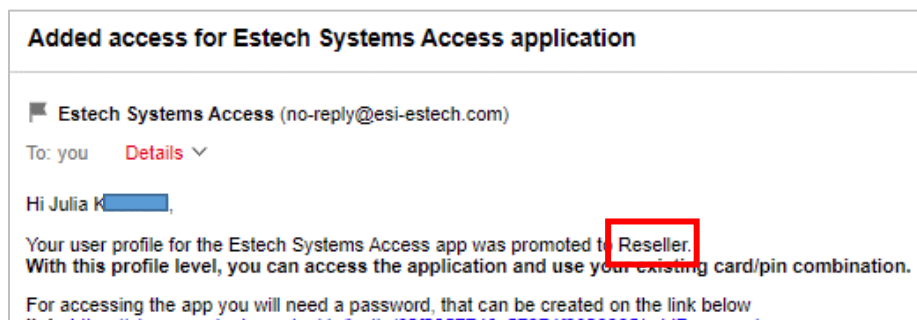
- Be sure the Access Devices running the latest released firmware versions.
- Images will not appear for events that occurred before the device was updated.
- The camera icon will appear gray for
 - Those events before the upgrade
 - AC20 devices, which don't contain a camera
- The images are never deleted from the server.
- Images cannot be deleted.
- The image contain a date/time stamp in the upper right corner in the following format:
 - YYYY-MM-DD HH:MM:SS
- The images cannot be downloaded in a bulk file or report but the image can be saved to the PC or LAN if needed by right-clicking on the image and choosing "save image as..."

ESI Reseller Accounts

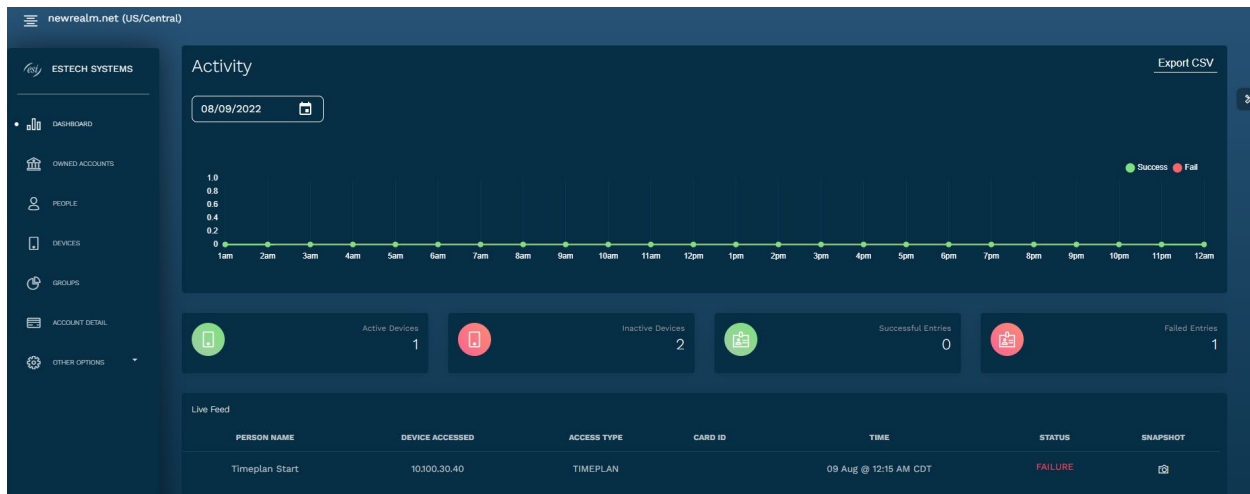
ESI resellers who are managing specific end-user accounts are setup in a similar fashion.

When your account is created by ESI the administrator you'll receive an email, where you'll create a password and login to the dashboard. Very similar to process as noted in [Your Access Dashboard Account](#) section.

Only ESI personnel can classify a user as a Reseller. But a Reseller can add admins to their account and the managed (end-user) accounts. At this time only ESI personnel can create an account.



In the reseller home view if you, the reseller, have no devices of your own for your own building, the dashboard, people, and devices tabs on the reseller home view will remain empty. If you are using ESI Access at your own building you'll manage those devices and people in the view below from the left navigation panel.



What any reseller will care about is the end-user accounts they manage. You'll access those by clicking Owned Accounts in the left navigation panel.

ACCOUNT NAME	DOMAIN	ACTION
newrealm.net	newrealm.net	
matejin21	matejin2	
AgeOfEmpires	aoe.com	

To edit an account click on the pencil icon next to the desired account. The view will change to the desired account.

Troubleshooting

Issue	Solution
The People CSV file template will not import.	Note: if a program such as Google Sheets or Excel is being used to modify the .csv file, the formatting for both Card ID and Pin fields needs to be changed to "Plain Text," in order for leading 0's to be programmed and accepted.
Not all the people in my Import file appear in the dashboard.	As shown, duplicates are not accepted. Duplicates can be due to name, RFID number, PIN number, or email address. All entries must be unique. <div> <div>Upload CSV</div> <div>Download CSV template</div> <div> <div>access_template_people_7212022.csv</div> <div></div> <div>Select CSV file</div> </div> <div>Click "Upload" to add 1 people from this CSV. Following 6 duplicates are found.</div> <div> <div>Billy B</div> <div>Brandon Crist</div> <div>Becki Lambchop</div> <div>Jason Cowboy</div> <div>Jimbo S</div> <div>Mario V</div> </div> <div>Upload</div> <div>CANCEL</div> </div>
I don't see certain accounts I manage when logging in as a Reseller.	Managed accounts are assigned to specific users within a Reseller account. It's possible newly created accounts were not added to your specific name. Please contact ESI Support, who can edit which accounts you manage.
I'm a Reseller and I'm trying to add myself under People to	As a reseller you do not need to manually add yourself to the accounts you manage. You receive that account access by default.

Issue	Solution
each of the accounts I manage but it tells the email address is already used.	
Users are not getting access. I check the access device itself and it shows no one in the access list even though I imported a user list.	This is typically caused because the user is importing their contacts directly to the reader. When using the Access Dashboard it's not necessary to do this and actually prevents the list in Access Dashboard from making its way to the device. If you've added contacts to the device itself, delete them (from the reader). Ensure that person is in the Access Dashboard. Add that person to a Group. Give the system a few minutes and access should be successful.
I am unable to login.	If you have forgotten your password click the Forgot Password link on the login page. ESI personnel cannot create or reset passwords.
The video from the access device to my ePhone is not working. Meaning I can't see the device video stream on my phone.	The following ePhones are those that can receive video from the Access Devices – ePhone8, ePhoneX, ePhone4x v2. Make sure that the following is unchecked in the access device: Line >> Advanced >> Uncheck "Use VPN". Note this is NOT the VPN checkbox under the Network tab.
I am unable to see the device in my account.	Ensure that you've covered all the settings mentioned in the Getting Started section of this document.
I can see the device in the Account but am getting an "invalid or missing" VPN message when selecting Show Active Users.	If the device is not obtaining a VPN IP address make sure that the following is not blocked by the network. <ul style="list-style-type: none"> • https://access.esiapi.io/ • 3.21.121.201 or 3.21.121.202 • Port: 1194
I am unable to select Show Active Users.	
The access device is not coming online as shown in the Access Dashboard.	
I can see the Device in the Account but no log information is displayed when the reader is accessed.	Ensure the following is set in the device under the System > Auto Provisioning tab under TR069 section <ul style="list-style-type: none"> o ACS Server Type:1 o ACS URL:https://doorcom-prod.esihs.net:7547 o ACS UserName: * o ACS Password:* o ProvisioningCode: o Enable TR069:1 o TLS Version:2 o Periodix Interval:300 *Contact ESI Support for the default password. Ensure the following is set in the device under the EGS Settings > Features tab <ul style="list-style-type: none"> o Enable Log:1 o TR069 Log Format: <ul style="list-style-type: none"> \$index,\$result,\$time,\$name,\$number,\$type,\$cardID,\$department,\$position,\$location,\$fwdNumber,\$code o UDP Log Format: <ul style="list-style-type: none"> <8>door\$index:\$result,\$time,\$name,\$cardID,\$type,\$description,\$mac,\$code o Addr. of Log Server: almanac.esiapi.io o Port of Log Server:30000 o Access Code Mode:2 Tip: This information can be seen in one place by accessing the CONFIG file from the device. It's located under the System > Configuration tab

Issue	Solution
	<div> <div>InformationAccountConfigurationsUpgradeAuto Provision</div> <div> Export Configurations <div> Right click here to SAVE configurations in 'txt' format. Right click here to SAVE configurations in 'xml' format. </div> </div> </div>
What happens in the case of an Internet outage?	In case of an internet outage, the last schedule sent will be currently retained by the device. For example if a user is scheduled from 8:00 AM to 5:00 PM, and the internet goes out at 4:55 PM the user will remain active on the device until such time when the internet is restored and the updated schedule is received.
I don't see any People when selecting Show Active Users.	Confirm that <ul style="list-style-type: none"> • The device is assigned to a Group. • The time range selected for that group is active. For example, if it's currently 2:00 PM and that reader's access is set from 8:00 AM – 12:00 PM, there will be no one in the active user's list. • The People defined in the Group have a Card ID or a PIN associated with them.
I am getting the following error <i>"Not possible to add device - existing for other accountId."</i>	<ul style="list-style-type: none"> • When devices are powered up they report to the Access Dashboard and devices are placed in an unknown status. Please contact ESI Support to have your device moved to your account.