

uniview EZAccess Client Software User Manual

Home » uniview » uniview EZAccess Client Software User Manual

Contents 1 EZAccess Client Software 2 Notice 3 Symbols 4 1. Introduction 5 2. System Requirements 6 CAUTION! 7 3. Login 8 4. GUI Introduction 9 5. Device Management 10 6. Personnel management 11 7. Visitor Management 12 8. Access Control 13 9. Attendance Management 14 10. Pass-thru Records 15 11. System Configuration 16 Documents / Resources 17 Related Posts

EZAccess Client Software

Thank you for purchasing our product. If there are any questions, or requests, please do not hesitate to contact the dealer.

Notice

CAUTION!

Please set a password of 9 to 32 characters, including all three elements: letters, digits and special characters.

- The contents of this document are subject to change without prior notice. Updates will be added to the new version of this manual. We will readily improve or update the products or procedures described in the manual.
- Best effort has been made to verify the integrity and correctness of the contents in this document, but no statement, information, or recommendation in this manual shall constitute formal guarantee of any kind, expressed or implied. We shall not be held responsible for any technical or typographical errors in this manual.
- The illustrations in this manual are for reference only and may vary depending on the version or model. So please see the actual display on your device.
- This manual is a guide for multiple product models and so it is not intended for any specific product.
- Due to uncertainties such as physical environment, discrepancy may exist between the actual values and reference values provided in this manual. The ultimate right to interpretation resides in our company.
- Use of this document and the subsequent results shall be entirely on the user's own responsibility.

Symbols

The symbols in the following table may be found in this manual. Carefully follow the instructions indicated by the symbols to avoid hazardous situations and use the product properly.

Symbol	Description
WARNING!	Indicates a hazardous situation which, if not avoided, could result in bodily injury or death.
i CAUTION!	Indicates a situation which, if not avoided, could result in damage, data loss or malfunction to product.
NOTE!	Means useful or supplemental information about the use of product.

1. Introduction

EZAccess is an attendance management software application program based on access control and used with access control devices. EZAccess supports device management, personnel management, access control and attendance management. EZAccess supports flexible deployment and meets various demands from small and midsized access control and attendance management projects.

2. System Requirements

The computer (PC) that runs the software shall meet the following minimum configuration. The actual system requirements may vary depending on the way EZAccess is used.

Specifications	Requirements
CPU	Intel® Core™i5-3470 CPU @3.2GHz (4 CPUs)~3.2GHz or higher
Memory	8GB or more
HDD	At least 20GB free space
Monitor	1440*900 resolution or higher
Operating system	Microsoft Windows 7/10, 64-bit

CAUTION!

- Please disable the antivirus software on your computer before you start installation.
- If you are using V1.2.0.1 or later, you can upgrade the version by directly installing a higher version without uninstalling the current version.
- If you are using V1.3.0 or later, you can downgrade the version by directly installing a lower version without uninstalling the current version. The lowest version you can downgrade to in this way is V1.3.0. To downgrade to versions lower than V1.3.0, you have to uninstall the current version first.
- When the client software starts, it automatically disables the sleep mode on the computer. Do not enable sleep mode.
- If the antivirus software alerts you to risks when scanning the client software, please ignore the alert or add the client software on the trusted list.

3. Login

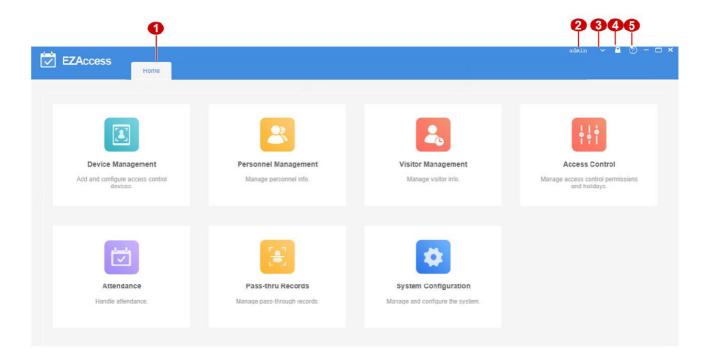
Enter the username and password, click Login.

NOTE:

- For first-time login, a page is displayed for you to create new users. Enter the username and password for the new user. Please set a strong password to enhance account security.
- If Auto Login is selected, EZAccess will skip the login page at the next startup and automatically log in using the most recently used username.

4. GUI Introduction

The main page is displayed when you are logged in. The main page consists of the Control Panel and some functional buttons.



No.	Description					
1	Home page, including Device Management, Personnel Management, Visitor Management, Access Control and Attendance Management, Pass-thru Records and System Configuration modules.					
2	Shows the current username. Click to view the user type and login time.					
3	Click to change password or log out.					
4	Lock button. Click to lock the client software. A password is required to unlock the client software.					
5	Help button. Click to view software information, open source software licenses or the user manual.					

5. Device Management

Use EZAccess to manage access control devices. Add access control devices for access control and attendance management.

5.1 Add a Device

1. Click Device Management on Control Panel.



NOTE!

Click **Add** to add a device with a known IP address. This section describes how to search devices on the same subnet with the PC and add the discovered devices.

2. Click Auto Search. Devices on the same subnet with the PC are discovered.



- 3. To add a device, click for the device in the **Operation** column. To add multiple devices with the same configurations (username/password), select the devices and then click **Batch Add**.
- 4. Narrow down the search by setting search conditions:
- IP address: Search devices within the specified range.
- Status: Filter devices that have been added or not.
- 5. Check whether the device is online.



NOTE!

- · Up to 32 devices are allowed.
- Before you add a device, configure a fixed IP and set a default face library on the device. See the device user manual for detailed information.

6. Personnel management

Add persons for attendance management.

6.1.1 Organization

- 1. Click Personnel Management on Control Panel.
- 2. Click to edit the organization name on the left-side organization list.

3. To create an organization, click right to the root organization, enter the organization name. The organization appears on the organization list. You can add more organizations in the same way. To delete an organization, click . Up to 10 levels of organizations are allowed.



NOTE!

- The root organization cannot be deleted or modified.
- · An organization that includes organizations cannot be deleted.

Click an organization to view people in the organization and its sub-organizations.

6.1.2 Add a Person



NOTE!

- Totally up to 5000 persons are allowed. Up to 500 persons are allowed in an organization (not including sub-organization).
- If a person ID already exists on the client, then a person with the same person ID cannot be added before the existing person ID is deleted from the client.
- Up to six face images can be uploaded for each person. Only JPG images are allowed.
 Image size: 10-512KB. Max resolution (W*H): 1920px*1080px.

1. Add in batches

- 1. Click Personnel Management on Control Panel.
- 2. To download the default template, click Download.
- 3. Enter the required personal information in the template. The person ID, name are required.
- 4. Select the target organization from the left-side organization list, click Batch Import.
- 5. Select the file to import and then click OK.
- 6. The list updates automatically when data is imported successfully.

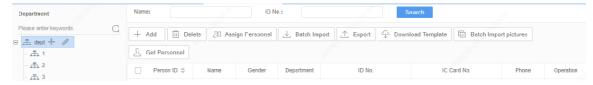


NOTE!

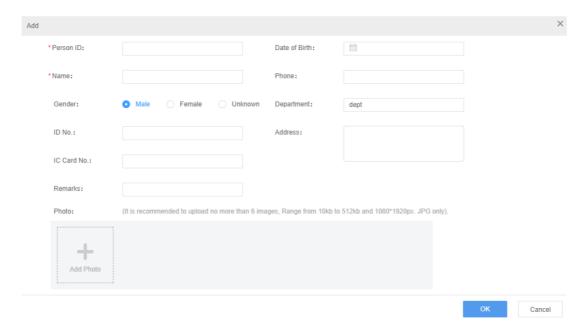
Up to 500 persons can be imported at a time.

2. Add one by one

- 1. Click Personnel Management on Control Panel.
- 2. Select the target organization from the left-side organization list, click Add.



3. Complete the required personal information. The person ID, name are required.



4. Click OK.

Click the organization on the left-side organization list. The persons in the organization are listed on the right side.

3. Import pictures in batches

- 1. Click Batch Import Pictures.
- 2. Upload a ZIP file that includes images named in this format: Person ID_OrderNum.
- 3. Click OK. The pictures are imported.

4. Get personnel

- Click Get Personnel, and then select the target device.
- Click OK. The personal information of the device is shown in the table below. The personnel successfully got will be deleted from the device side and assigned to the temporary department. Please assign personnel according to the actual situation.

6.1.3 Delete a Person

1. Delete in batches

- 1. On the left-side organization list, click the organization that the person belongs to, click Add.
- 2. Select the person you want to delete.
- 3. Click Delete.
- 4. In the dialog box displayed, click **OK**.

2. Delete one by one

- 1. On the left-side organization list, click the organization that the person belongs to, click Add.
- 2. Click below the person you want to delete.
- 3. In the dialog box displayed, click OK.

6.1.4 Other Operations

1. Search personal information

Enter the name or ID number on the top and then click Search. Search results are displayed.

2. Export personal information

Select the target organization on the left-side organization list, click Export on the right.

3. Assign personnel

Select an organization on the left-side organization list, select the personnel to be assigned on the right, and then click **Assign Personnel** to assign the personnel to an organization except temporary department.

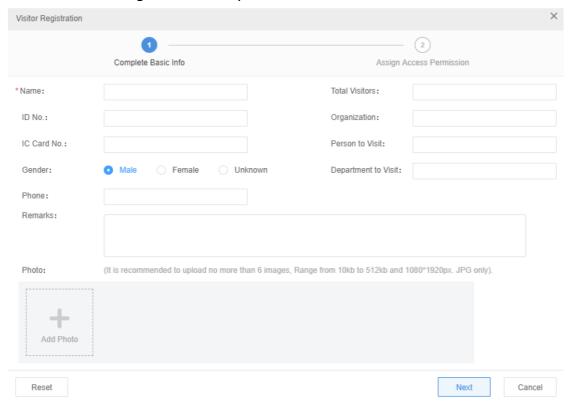
7. Visitor Management

Manage visitors by signing in/out and assigning/withdrawing access permissions.

7.1 Visitor Registration

Register visitor information and assign access permissions to visitors.

1. Click Visitor Registration. Complete the basic information about the visitor.



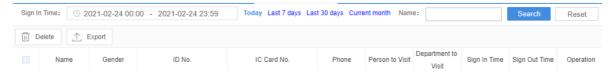
- Click Next. Set valid access time and accessible doors for the visitor.
- 3. Click **OK**. The visitor has access to the selected doors within the valid time after registration.

Other Operations

- Sign out
 - Click in the **Operation** column to sign out. The visitor's access permissions will be cleared after signing out.
- View authorization status
 - Click on the Operation column to view the authorization status of the visitor's access permissions.
- Edit access permissions
 - Click in the Operation column to edit the visitor's access permissions as needed.
- Delete signed-in visitors
 - Click in the **Operation** column to delete the signed-in visitor. The visitor's access permissions will be cleared after deletion.

7.2 Visitor Records

Click Visitor Records, search visitor information within the specified time period.



- View details: Click in the **Operation** column to view the visitor's information such as sign-in and sign-out.
- Delete visitor records: Select the records to be deleted and click or click in the
 Operation column.
- Export visitor records: Select the records to be exported, click and then select a path to save the records.

8. Access Control

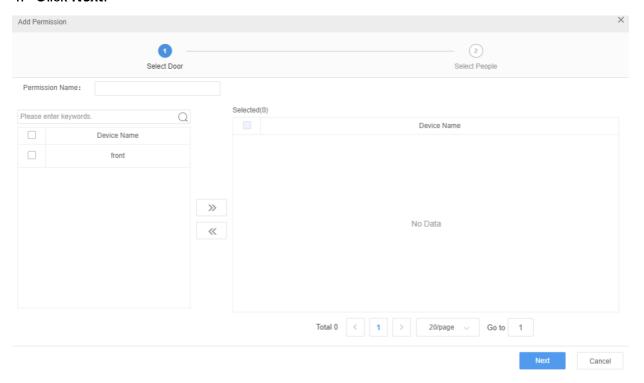
8.1 Access Permissions

Access Control > Access Permissions

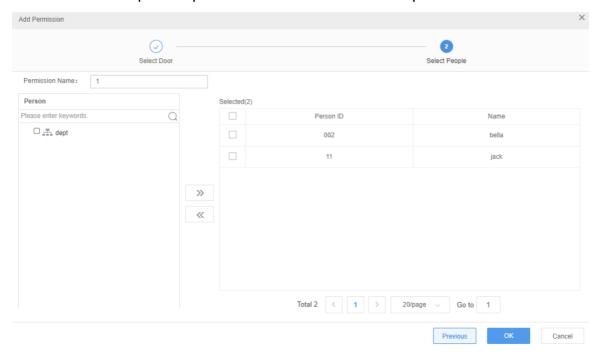
Assign permissions to allow access to specified doors.

- 1. Click Add Permission.
- 2. Enter the permission group name, select access control devices.

- 4. Click Next.



- 5. Select the persons you want to assign access permission, click _____. The selected persons are added to the right-side list.
- 6. Click OK. The specified persons now have access to the specified doors.



The permission group is listed. Click oview permission assignment status.



A success displayed in the **Config Status** column means permission is successfully synced to the device; otherwise, failure.

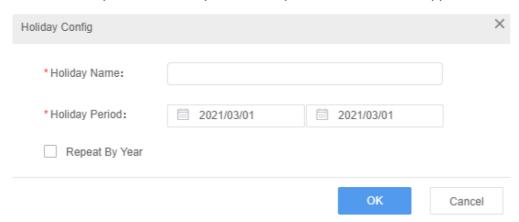
On the Access Permissions page, appears in the Operation column if permission assignment fails for any person in the permission group, in this case, you can click to try permission assignment again for the failed person.

Click or it to edit or delete a permission group.

8.2 Holiday Management

Access Control > Holiday Management

Set public holidays or specified days as holiday. Holiday has higher priority than attendance rules. For example, attendance rules require attendance during 9:00-17:00 from Monday to Friday. If New Year's Day is set as holiday, then holiday attendance rules are applied on New Year's Day.



- 1. Click **Add**, enter the holiday name and set the holiday period. The holiday name must be unique.
- 2. (Optional) If Repeat By Year is selected, the holiday will repeat every year.
- 3. Click OK.

Click or in the Operation column to edit or delete the holiday.



NOTE!

Up to 32 holidays are allowed.

9. Attendance Management

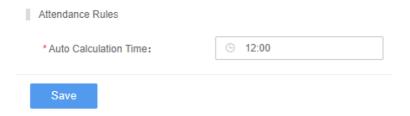
Set attendance regulations, schedule shifts, re-sign in or out for abnormal attendance records, and handle leaves. View attendance details and abnormal attendance summary.

9.1 Attendance Regulations

Attendance > Attendance Regulations > Attendance Rules

Set attendance rules.

Auto Calculation Time: Set automatic calculation time of attendance. The system will calculate the attendance data of the previous day at the set time every day. You can see attendance data in **Attendance Details**. If the automatic calculation of attendance data fails, please refer to **Attendance Details** for manual calculation.

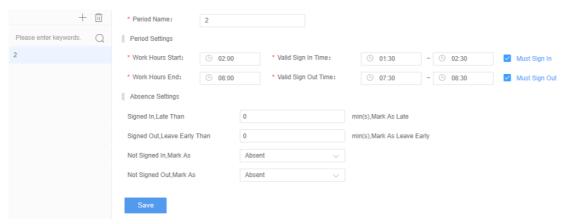


9.2 Staff Schedule

9.2.1 Set Time Period

Attendance > Staff Schedule > Period Settings

Set work hours and valid sign in/out time range.



- 1. Click +.
- 2. Enter a name for the period.
- 3. Set when the work hours start and end. One day will be added automatically (+1) if the Work Hours End time is earlier than the Work Hours Start time. The Work Hours Start time and

Work Hours End time must be within the range of Valid Sign In Time and Valid Sign Out Time

- 4. Set whether sign-in and sign-out are mandatory.
 - Sign-in and sign-out are mandatory
 - a Set Valid Sign In Time and Valid Sign Out Time: Specify a valid time range for sign-in and out. The time range includes the boundary values. For example, if the Valid Sign Out Time is 17:30-18:30, then sign-out is allowed during 17:30-18:30.
 - b Configure absence settings.
 - Signed In, Late than x min(s), Mark As Late: If a person signs in within x min(s) after the
 Work Hours Start time, the attendance status is normal. x is no more than 999.
 - Signed Out, Leave Early Than x min(s), Mark As Leave Early: If a person signs out within x min(s) before the Work Hours End time, the attendance status is Normal. x is no more than 999.
 - Clear the checkboxes if sign-in and sign-out are not mandatory.
- 5. Click Save.

To edit a time period, click the period name on the left.



NOTE!

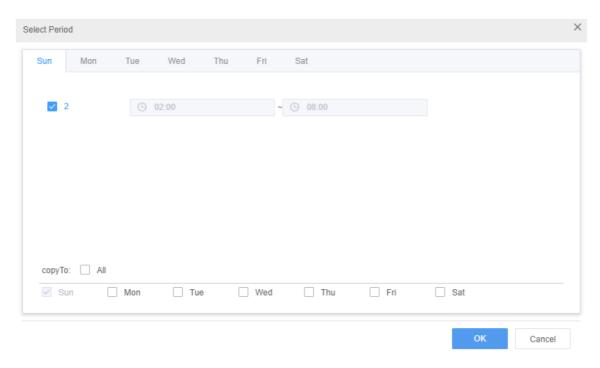
- All the time set on this page cannot be later than the auto calculation time of the next day.
- The valid sign-in time range must not overlap with the valid sign-out time range.

9.2.2 Shifts Management

Attendance > Staff Schedule > Shift Mgt

Add shifts and set the corresponding time period for each shift.

- 1. Click +, enter the shift name.
- 2. Click Select Period.



- 3. Select a workday on which the shift starts.
- 4. Select a time period (set in Period Settings).
- 5. Select workdays for the time period. Select **All** to apply the same settings to every day (Monday through Sunday).
- 6. Click OK.

Click Empty to clear all the valid time periods.



NOTE!

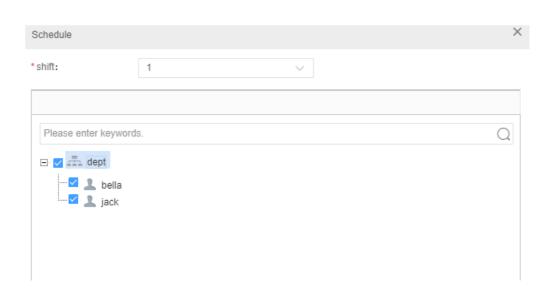
Up to 8 periods are allowed for each shift.

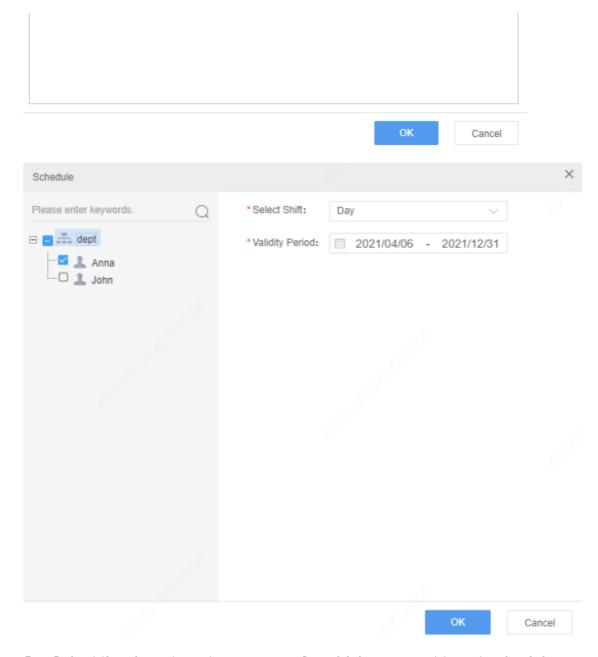
9.2.3 Schedule Management

Attendance > Staff Schedule > Schedule Mgt

Specify shifts for a department or a person.

1. Click Schedule.





- 2. Select the department or persons for which you want to set schedule.
- 3. Select a shift and set a validity period.
- 4. Click OK.



NOTE!

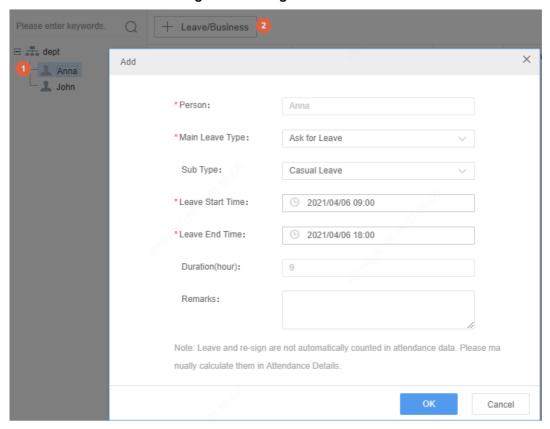
- You can schedule different shifts for a person by setting different validity periods for the shifts.
- Each person can have only one shift every day. If the validity period of the new shift and the old shift overlap, the overlapping part of the validity periods belong to the new shift.

To cancel a shift for a person, select the shift and then click Cancel Schedule on the top.

9.3 Attendance Handling

9.3.1 Leave Management

Attendance > Attendance Mgt > Leave Mgt



- 1. Select the target person on the organization list.
- 2. Click Leave/Business.
- 3. In the dialog box displayed, select the main leave type, set the leave start time and leave end time.
- 4. Select a sub-type. The **Sub Type** drop-down list is displayed only when the main type is **Ask** for Leave.
- 5. Click OK.

Click \mathcal{L} or \mathbb{H} in the **Operation** column to edit or delete the leave.

9.3.2 Re-Sign In&Out Management

Attendance > Attendance Mgt > Re-Sign In&Out Mgt

For abnormal attendance records such as absence, late arrival, you can modify the attendance records by re-sign in and out operations. After making a re-sign in or out, you can click **Calculate** in Attendance Details to update the attendance status and absent hours of this day.



- 1. Select the department or person on the left-side organization list.
- 2. Set a time range. All the abnormal attendance records of the specified department or person within this period are displayed.
- 3. Click (re-sign in) or (re-sign out) in the **Operation** column for the absence record you want to handle.
- 4. Modify the sign-in time or sign-out time as needed.
- 5. Click OK.

Effective Re-sign In&Out Time Range

Whether Have Asked for Leave	Effective Re-sign In Time Range	Effective Re-sign Out Time Range
Yes	Sign In Start Time to Sign In End Time	Sign Out Start Time to Sign Out End Time
No	Sign In Start Time to Work Hours End Time	Work Hours Start Time to Sign Out End Time



NOTE!

- The re-sign in or out time must be within the effective time range, and the re-sign out time must not be earlier than the re-sign in time; otherwise, the re-sign in or out operation is not effective.
- A person can be re-signed in or out up to 100 times a day. Before more re-sign operations can be performed for this person, you need to clean up re-sign in&out records for this person manually.

9.3.3 Re-Sign In&Out Records

Attendance > Attendance Mgt > Re-Sign In&Out Records

A record is generated each time a sign-in or sign-out time is modified manually. You can search, edit or delete re-sign in&out records on this page.

- 1. Select the department or person from the organization list.
- 2. Specify a time range and type, click Search. Search records are displayed.



Click do modify a re-signed time.

Click under the delete a re-sign in&out record. After the record is deleted, the person's attendance statistics will use the original attendance data during the corresponding time period.

9.4 Attendance Statistics

Attendance statistics only include people in the system and do not include strangers. Entry/exit records of strangers are included in pass-thru records.

Original Data: View all records of people entering or leaving by face recognition or swiping cards during the specified period.

<u>Attendance Details</u>: View attendance details including attendance status and absence duration during the specified time period. One record is generated for each person every day.

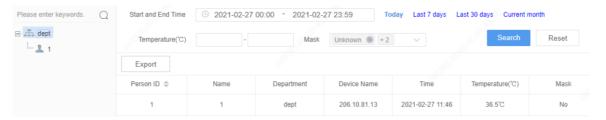
Attendance Summary: View the total length of absence during a specified period and the details.

9.4.1 Original Data

Attendance > Attendance Statistics > Original Data

View all the records of people entering or leaving by face recognition or swiping cards during a time period. For example, if there are five entries or exits, then five access records are displayed.

Search original data of a department or a person using search criteria including person ID, name, department, date, time, body temperature, whether wearing a mask.



- 3. Select the department or person from the organization list.
- 4. Set a time range.
- (Optional) Set a body temperature range and mask wearing status. This feature is available when the access control device supports this feature and the required configurations have been completed.
- 6. Click Search.
- 7. Search results are displayed. You can click Export to export the data.

9.4.2 Attendance Details

Attendance > Attendance Statistics > Attendance Details

View attendance details including attendance status and absence duration during a specified period. One record is generated for each person every day.

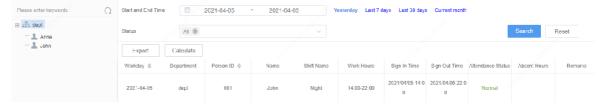
All the original data of a day will be generated at the automatic calculation time on the next day. If automatic calculation fails, or if any shifts have changed, you can select the department or person on the left-side organization list, set the start and end time, and then click **Calculate** to re-calculate attendance and generate attendance details.



NOTE!

When you calculate attendance for a certain day, if abnormal shifts are detected for this day, or if any shifts in this day are not yet started or ended, then attendance data of the relevant persons in this day will be deleted and will not be calculated.

You can search attendance statistics of a department or a person by setting search criteria including person ID, name, department, date, time, sign-in/out time.



9.4.3 Attendance Summary

Attendance > Attendance Statistics > Attendance Summary

View the total length of absence during a specified time period and the details. For example, the total length of late arrivals, leave early, and absence during one month.

You can set search criteria to view personnel information of a specified department or personal information of a about a person, including person ID, name, department, attendance status and details.



Click in the Attendance Details column to view detailed attendance information of the person.

View Details										×
Workday 🜲	Department	Person ID 💠	Name	Shift Name	Work Hours	Sign In Time	Sign Out Time	Attendance Sta tus	Absent Hours	Remarks
2021/04/05	dept	001	John	Night	14:00-22:00	2021/04/05 14:0	2021/04/05 22:0	Normal	Omin(s)	

10. Pass-thru Records

10.1 Real-time Records

Pass-thru Records > Real-time Records

View real-time records of people passing through an access control terminal. Click on the Operation column to view the detailed information.

10.2 History Records

Pass-thru Records > History Records

View historical records of people passing through an access control terminal.

Select a department you want to search in the organization list on the left. Set the alarm source, date, mask wearing status and body temperature. Click **Search**, then the search results will be displayed.



- To view detailed information about a record: click in the **Operation** column.
- To export search results: click Export.

11. System Configuration

11.1 Snapshots

Set a path for saving snapshots. The PC's disk storage status is displayed. Choose a disk with sufficient space. Snapshots will be saved to the specified path.

11.2 Alarm Parameter Configuration

- 1. Click System Configuration > Alarm Settings.
- 2. Configure alarm parameters. Parameters are described in the table below.

Parameter	Description
Temperature Unit	Choose Celsius or Fahrenheit as temperature unit.
Temperature Detection	Enable/disable temperature detection. When temperature detection is enabled, an alarm will be reported when the temperature measured exceeds the threshold.

Parameter	Description
Abnormal Temperature Threshold	Set a threshold for abnormal temperatures. An alarm will be reported when the temperature measured exceeds the threshold.
Mask Detection	Enable/disable mask detection. When mask detection is enabled, an alarm will be reported when a person not wearing a mask is detected.
Alarm Sound	When this feature is enabled, the alarm will sound when an abnormal temperature or a person not wearing a mask is detected. Please enable temperature detection or mask detection first.
Pop-up Alarm Window	When this feature is enabled, an alarm window will pop up when an abnormal temperature or a person not wearing a mask is detected. Please enable temperature detection or mask detection first.

3. Click Save.

11.3 Database Management

Enable **Scheduled Backup** or click **Backup** to back up data. Backing up or restoring data may affect client performance, it is recommended to perform backup and recovery when the client is idle.



Back up data

- 1. Click to set the backup path. The backup files are saved in the EZAccess_config_DB folder. If this folder doesn't exist, it will be created automatically.
- 2. Back up data:
 - Scheduled backup: Perform scheduled backup according to user's configuration. This function is turned on by default, you can turn it off manually.

- a) Enable Scheduled Backup.
- b) Set backup date and time. The backup will run automatically on the set date and time on a weekly basis.
- Manual backup: Click Backup to back up immediately.

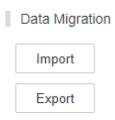
Only the latest backup file is kept in the backup path.

Restore data

- 1. Click Restore.
- 2. Enter the file password to decrypt the backup file. Click OK to restore the latest backup data.

11.4 System Maintenance

Data migration can be used to quickly configure the client and restore data in some scenarios such as computer replacement and data sharing. Compared with backup and recovery, data migration can also restore face images and images for pass-through records.



Note: Import or export the database and images only.

Export data

- 1. Click Export.
- 2. Choose a path to save the exported data. The exported files are saved in the EZAccess config migration folder. If this folder doesn't exist, it will be created automatically.
- 3. Click OK.

The exported file is named Access_config_migration + export time (the export time includes year, month, day, hour, minute and second).

Import data

- Click Import.
- 2. Choose a file and then enter the file password (the file password is the same as the client login password of the exported user).
- 3. Click OK.

Documents / Resources

uniview EZAccess Client Software [pdf] User Manual EZAccess Client Software