

## Controlsoft Identity Access Client Software

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IA Client Software Installation Guide v9 © 2020 Controlsoft Ltd

## Contents

1. Introduction.....	2
1.1. PC Specifications.....	2
2. Installing Identity Access Client .....	3
2.1. Pre-install Checks.....	3
2.2. Install the Client software.....	4
3. Launching the IA User Interface .....	12

## 1. Introduction

With the increasing need to quickly administer who enters our buildings, it's not always practical to run your access control software from one central location. Identity Access now allows the capability to access the system from multiple PC's/laptops across your network, enabling you to speed up the process of administering employees, visitors and contractors.

Identity Access (Client) can be run from a separate computer - say in the Human Resources department and can link back to the main Identity Access (Server). This way a limited amount of permissions can be applied to the operator of the Identity Access (client) software - e.g. so they can only enrol users or remove users – rather than configuring the doors / locks / controllers etc. Identity Access (client) operator can have the same permissions to administer all functions and features of the software/hardware as if running directly from the Identity Access (Server).

For further information, please refer to the on-line Help provided with the Identity Access software.

### 1.1. PC Specifications

#### Recommended Client PC Specification

- Intel i3 processor @ 3GHZ.
- 4GB RAM.
- 100GB Free Disk Space.

- 10/100 Network Card.
- USB Port.
- Screen Resolution = 1024x768 or better

### Operating Systems:

- Windows 10 (x64).

## 2. Installing Identity Access Client

**We recommend this installation is performed by advanced users.**

***NOTE: Before installing any Client software, please check the version of Server software as the Server and Client MUST be the same version.***

To ensure that your software is installed correctly, it is important to run through the following pre-installation checks.

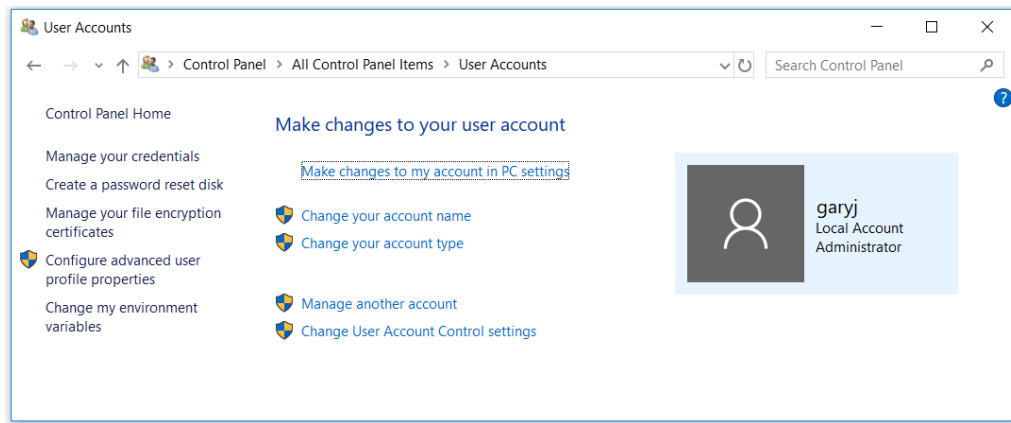
### 2.1. Pre-install Checks

**Before installing the IA client software, please temporarily disable your antivirus for the duration of the install.**

Next please ensure that you are logged into an Administrator Account. To do this:

1. Click on the **Start** Button and select **Control Panel** then select **User Accounts**.
2. On the right hand side of the window the User's details will be shown, check that the type is 'Administrator' as shown below.

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3. If the User Account is not an Administrator, choose another account, or contact your system administrator.

### 2.2. Install the Client software

If the Identity Access (Client) software is to be installed and the Microsoft windows firewall or other hardware/software providers firewall system is in use on the Identity Access (Server) PC then configuration to allow access to the SQL service, SQL Server Browser, Identity Access Download Manager and Identity Access Log Server may be required.

The following additional Network ports should be open on the Identity Access (Server) PC.

SQL Server Access : TCP 1433

SQL Server Browser : UDP 1434

Identity Access Log Server : TCP 19000 & 19001

Identity Access Download Server : TCP 19100 & 19101

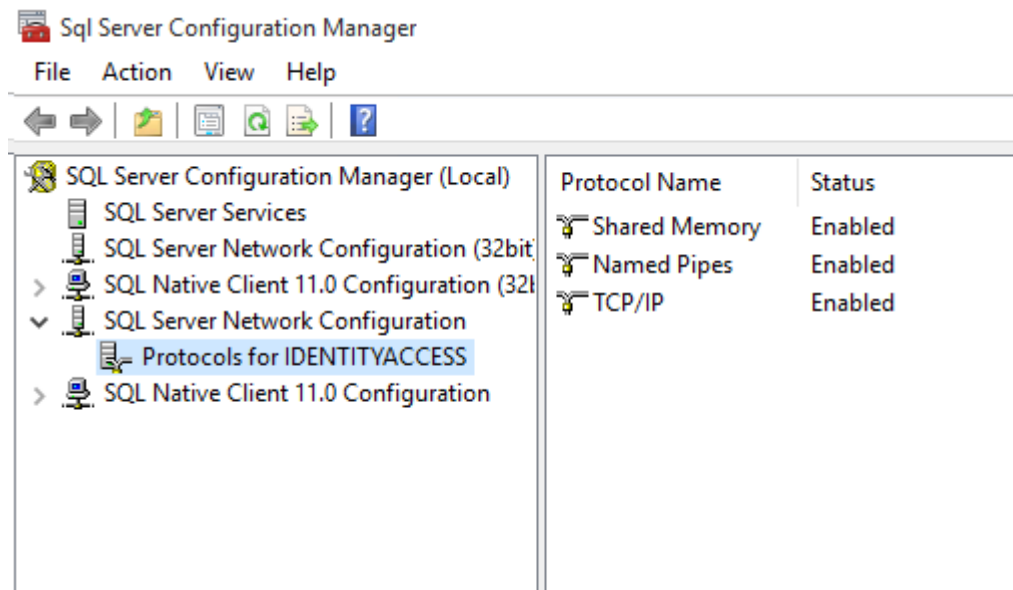
Configuration of Microsoft SQL Express to be available directly over TCP/IP port 1433 requires the following configuration steps – configured from the Identity Access (Server) PC –

Login to the Identity Access (Server) PC as an Administrator.

Click **Start, Microsoft SQL Server 2014** and select **SQL Server Configuration Manager**

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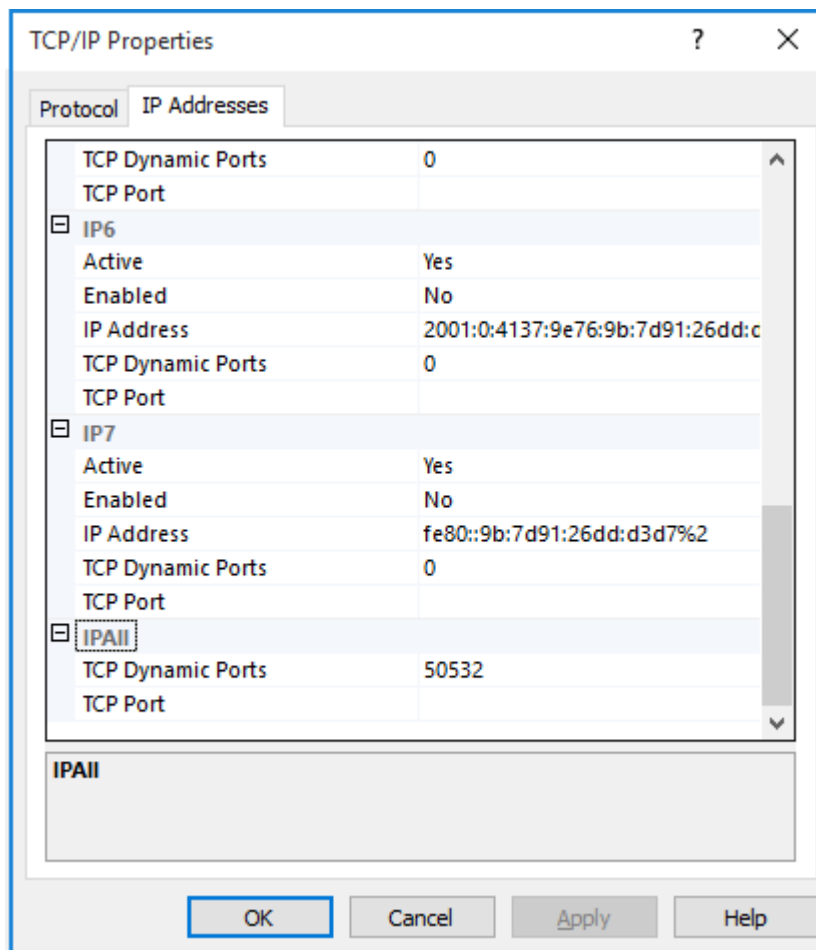
Expand the interface until you can see the following screen:



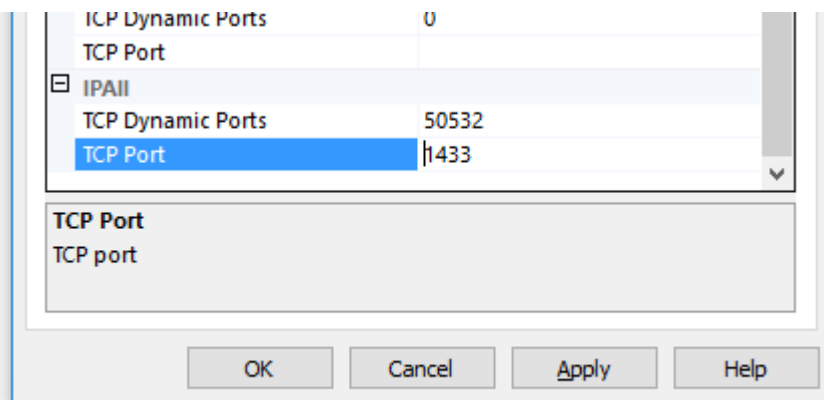
Double click on **TCP/IP** (on the right hand window) to open up the properties.

Select the **IP Addresses** tab (as below) and scroll to the bottom of the list of available IP Addresses.

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In the **TCP Port** section for **IPALL**, add the value **1433** and click **[Apply]**



You are warned that It will be necessary to restart the SQL services for changes to be applied. This can be achieved by restarting the SQL services in Windows Services, rebooting the machine or via SQL Configuration Manager -SQL Server Services.

Ensure that the Server PC can ping the Client PC and visa versa.

You are now ready to start installing the Identity Access Client software.

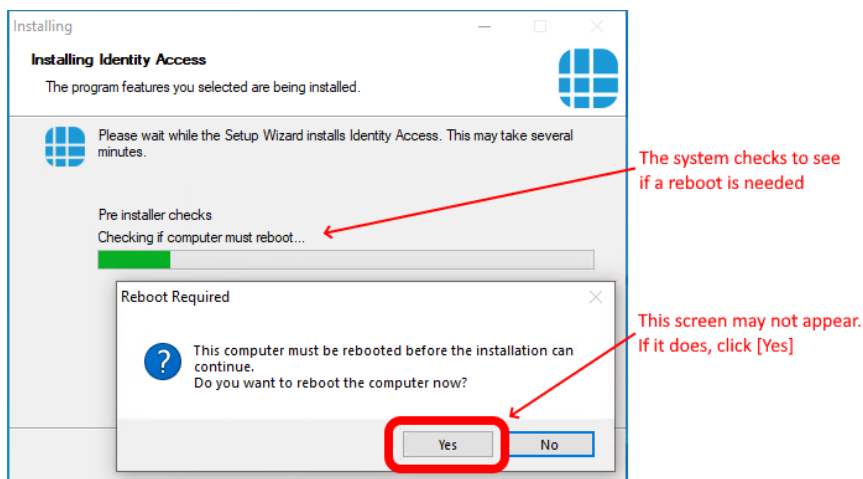
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Insert the USB flash drive into a spare USB port and the AutoPlay screen will appear.

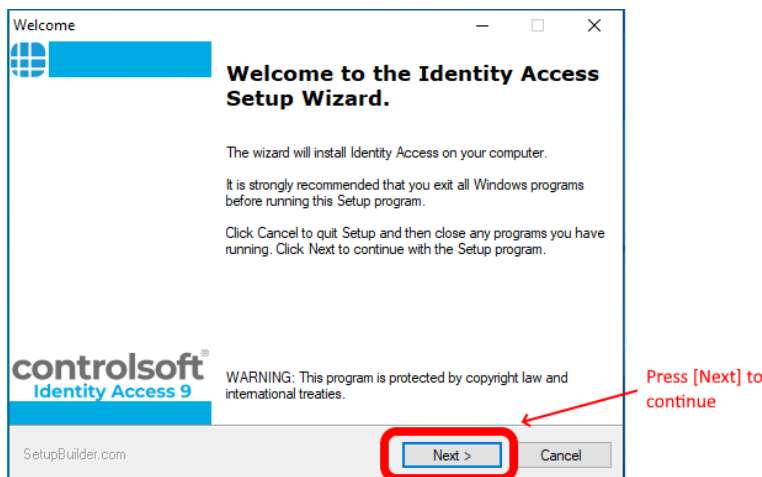
Select **Open folder to view files**.

If your PC is not configured with AutoPlay, please browse to **My Computer/This PC** and double click the **IA Flash Drive** USB drive.

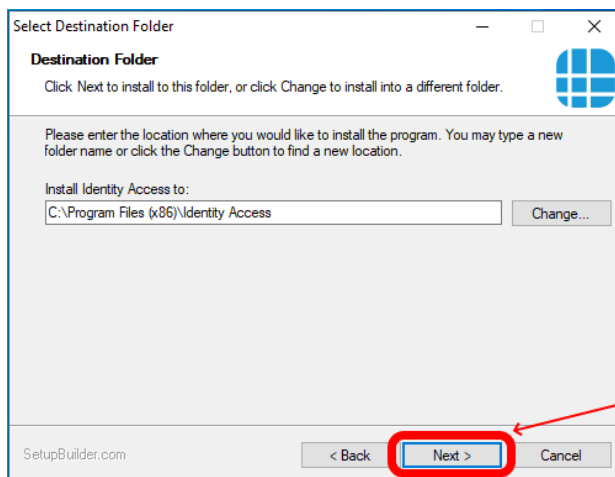
To start the installation, double click **Install\_IdentityAccess.exe**.



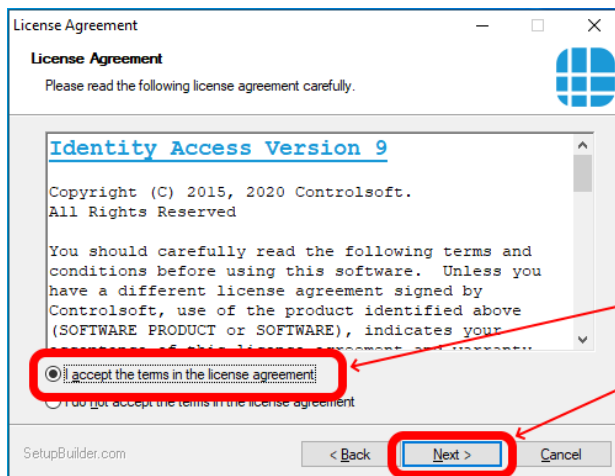
If the system reboots, the installation will recommence automatically.



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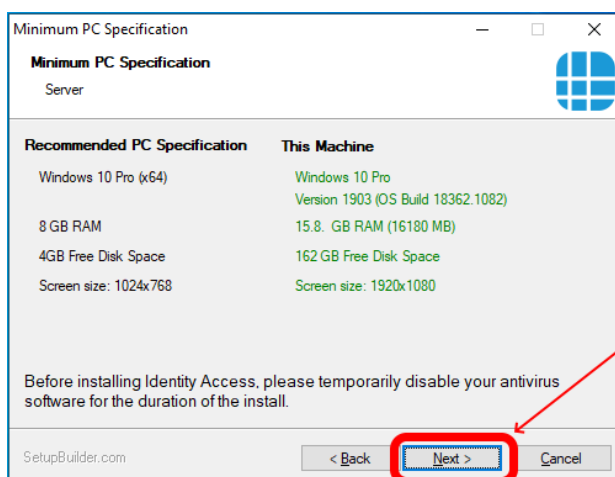


Press [Next] to continue



Read and accept the license

then click [Next]

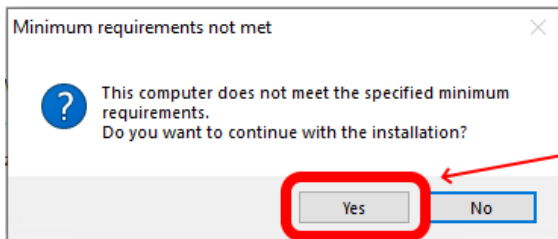


Press [Next]

**NOTE: If your system does not meet the minimum specification, the offending parameter will be displayed in red, not green. After pressing [Next], you will be warned again.**

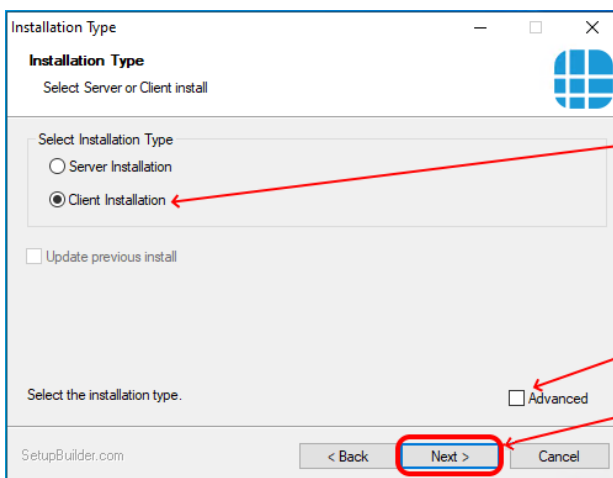


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Press [Yes] to continue  
(not recommended)

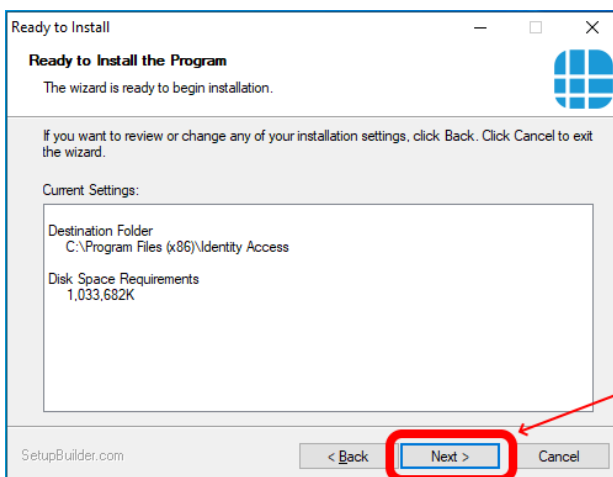
***NOTE: Controlsoft may refuse to support the system if the PC does not meet the minimum recommendations***



Select Client Installation

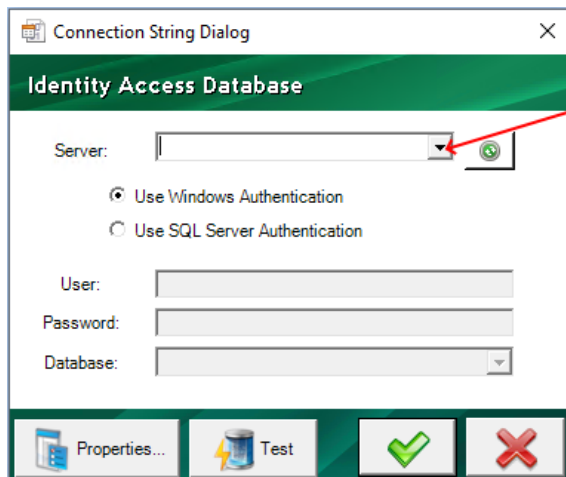
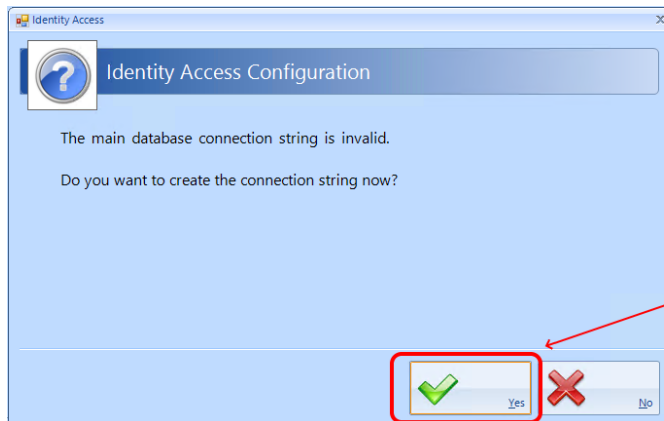
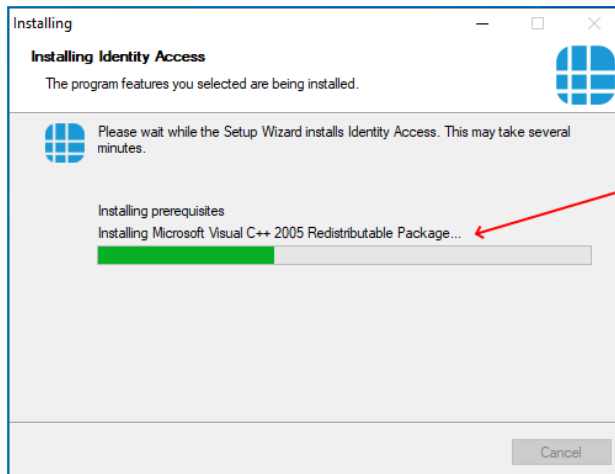
Select "Advanced" if you  
want Advanced options

Click [Next] to continue

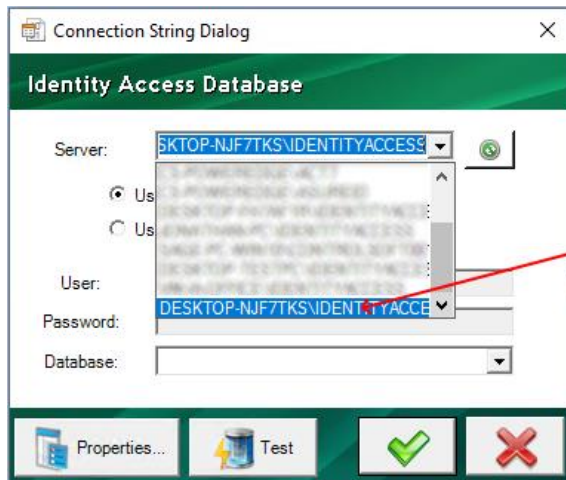


Press [Next]

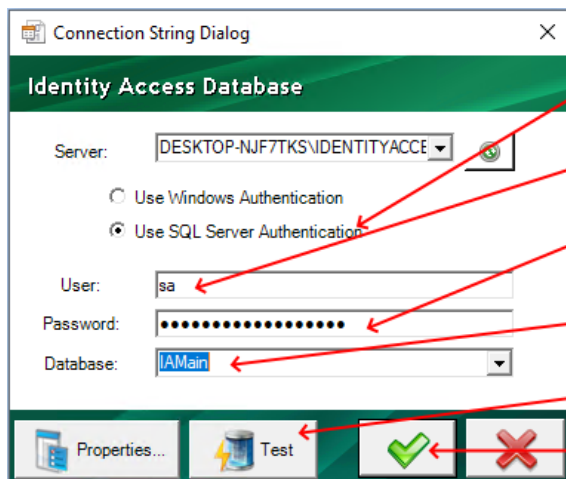
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Select the Identity Access database



Select SQL Server Authentication

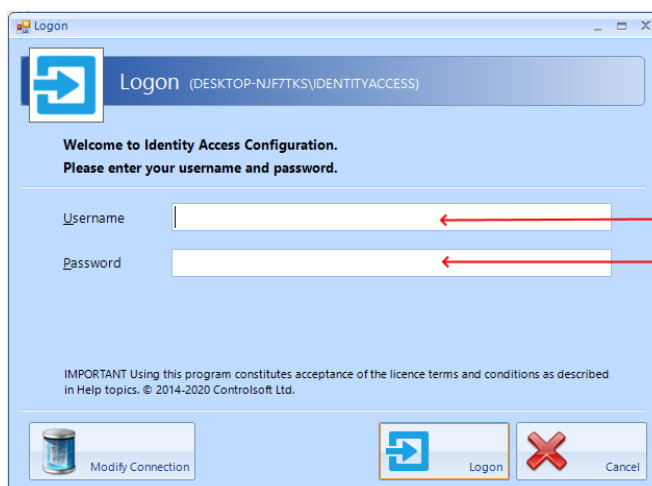
User = sa

Password = C0ntr0IS0ftAdm1n@!

Select IAMain from dropdown list

Test the connection

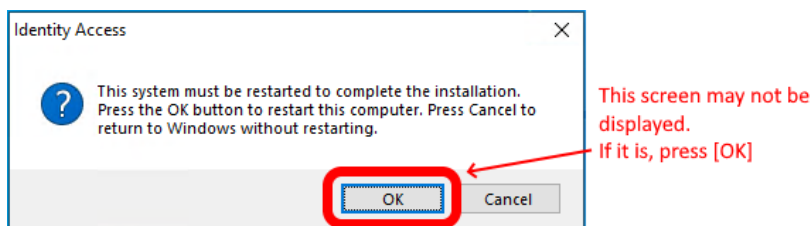
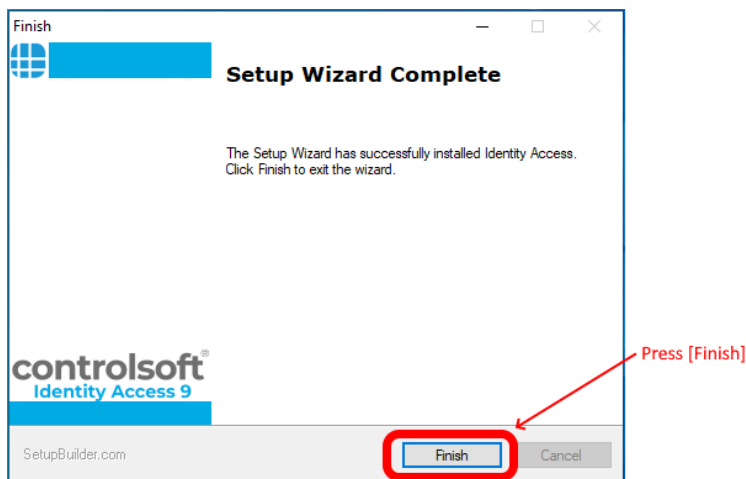
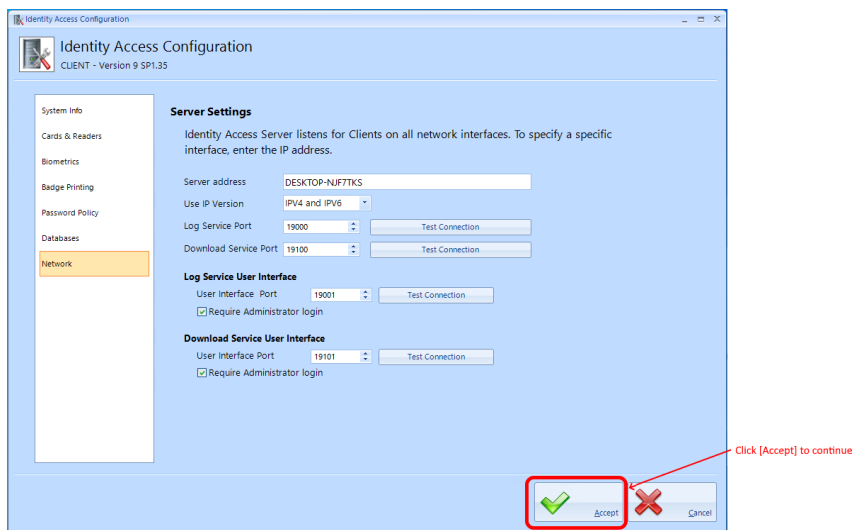
Click the "Done" button



Username = Admin

Password= Password

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**NOTE: When all the software has been installed, you may re-enable your antivirus software.**

### 3. Launching the IA User Interface

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Launching the User Interface -

Select **Start** > **Controlsoft** > **IA User Interface**.

1. The following splash screen will be displayed:



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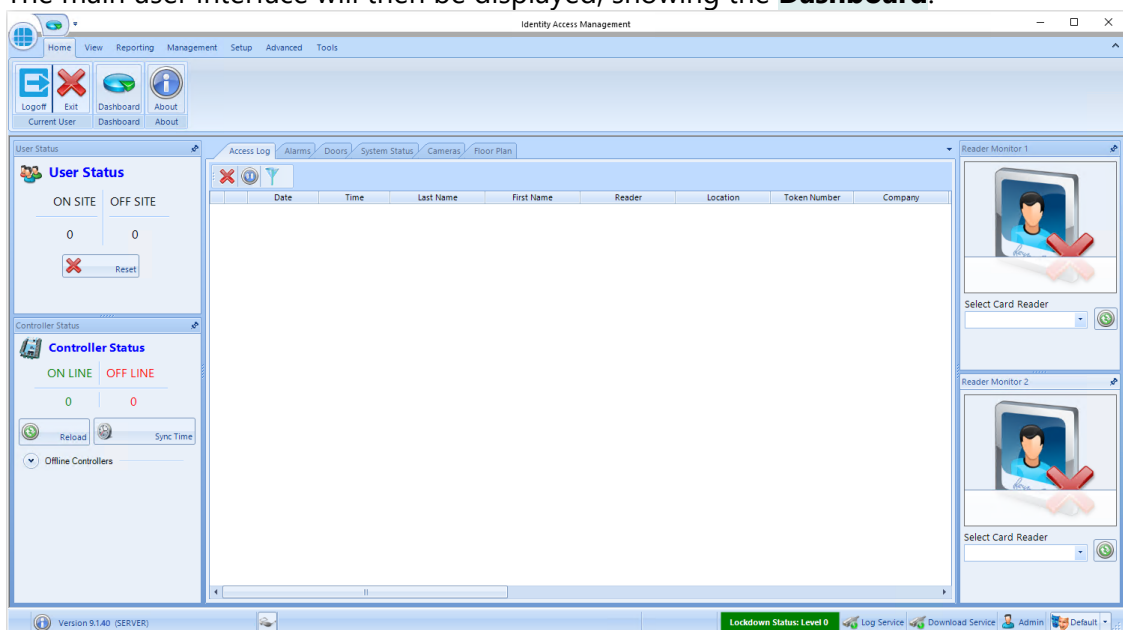
When initialised, the Logon screen will be displayed:



2. Enter a valid Username (default = Admin) and Password (default = Password) and click the **[Logon]** button (or press **[Enter]** on the keyboard).

**NOTE: these credentials are case sensitive.**

3. The main user interface will then be displayed, showing the **Dashboard**:



## Controlsoft Identity and Access Management Software

Please refer to the Identity Access Software Manual for further setup information.

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Information on all our products can be found on our website [www.controlsoft.com](http://www.controlsoft.com)