Controlsoft Identity Access Client Software



IA Client Software Installation Guide v9 © 2020 Controlsoft Ltd

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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.



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

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.

	TCP Dynamic Ports	0	\mathbf{a}
	TCP Port		
	IP6		
	Active	Yes	
	Enabled	N0	
	IP Address	2001:0:4137:9e76:9b:7d91:26dd:0	
	TCP Dynamic Ports	0	
	Active	Vec	
	Enabled	No	
	IP Address	fe80::9b:7d91:26dd:d3d7%2	
	TCP Dynamic Ports	0	
	TCP Port		
Ξſ	IPAII		
	TCP Dynamic Ports	50532	
	TCP Port		

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

ICP Dynamic Port	s U		
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IPAII	-	0533	
TCP Dynamic Port	5 DI	422	
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TCP Port			
TCP port			
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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.

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.



Select Destination Folder		×
Destination Folder Click Next to install to this folder, or c	lick Change to install into a different folder.	
Please enter the location where you folder name or click the Change butt	would like to install the program. You may type a new on to find a new location.	
Install Identity Access to:		
C:\Program Files (x86)\Identity Acce	Chang	je
		Press [Next] to continue
SetupBuilder.com	< Back Next > Canc	cel
License Agreement		×
License Agreement		
Please read the following license agr	eement carefully.	
Identity Access	Version 9	^
Copyright (C) 2015, 2 All Rights Reserved	020 Controlsoft.	
You should carefully	read the following terms and	
conditions before usi	ng this software. Unless you nse agreement signed by	
Controlsoft, use of t	he product identified above	Read and accept the license
(SOFTWARE PRODUCT or	SOFTWARE), indicates your	~
I accept the terms in the license a	agreement	- then click [Next]
	cense agreement	enen enen prentj
SetupBuilder.com	< Back Next > Canc	cel
Minimum PC Specification		×
Minimum PC Specification		
Server		
Recommended PC Specification	This Machine	
Windows 10 Pro (x64)	Windows 10 Pro Version 1903 (OS Build 18362.1082)	
8 GB RAM	15.8. GB RAM (16180 MB)	
4GB Free Disk Space	162 GB Free Disk Space	
Screen size: 1024x768	Screen size: 1920x1080	
		Press [Next]
Before installing Identity Access software for the duration of the in	, please temporarily disable your antivirus stall.	
SetupBuilder.com	< Back	cel

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.



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

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Installation Type				
Select Server or Client install				
Select Installation Type				 Select Client Installation
O Server Installation				
Client Installation				
Update previous install				
				Salast "Advanced" if you
				want Advanced options
Select the installation type.		Adva	nced	
			liccu	 Click [Next] to continue
etunBuilder.com	Raak C	Next 2		
sappanapr.com	< Dack	Next > Car	ncel	
ady to Install	< Dack		×	
ady to Install Ready to Install the Program	Cock		X	
ady to Install Ready to Install the Program The wizard is ready to begin installation.	CBCK		×	
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Installing — — X
Installing Identity Access
The program features you selected are being installed.
Please wait while the Setup Wizard installs Identity Access. This may take several minutes.
Installing prerequisites Installing Microsoft Visual C++ 2005 Redistributable Package
Cancel
kentity Access X
Identity Access Configuration
The main database connection string is invalid.
bo you want to create the connection suring now:
Click [Yes] to continue
Yes No
🗑 Connection String Dialog X
Identity Access Database Click on the down arrow t
Server: see all SQL databases
C Use SQL Server Authentication
lleer
Password
Database:
Properties K



K Identity Access Configuration	_ = ×
Identity Acces	ss Configuration
CLIENT - Version 9 SP	1.35
Surtem Info	Cause Cattions
Carris & Reariers	Identity Access Server listens for Clients on all network interfaces. To specify a specific
Riometrics	interface, enter the IP address.
Device Disting	Server address DESKTOP-NJF7TKS
badge Printing	Use IP Version IPV4 and IPV6 ·
Password Policy	Log Service Port 19000 C Test Connection
Databases	Download Service Port 19100 C Test Connection
Network	Log Service User Interface
	User Interface Port 19001 C Test Connection
	🕑 Require Administrator login
	Download Service User Interface User Interface Port 19101 * Text Connection
	✓Require Administrator login
	Click [Accept] to contin
	Accept Sancel
Finish	
Finish	- L X
	Sotun Wizard Complete
	Setup wizaru complete
	The Setup Wizard has successfully installed Identity Access. Click Finish to exit the wizard
controls	Press [Finish]
Identity Acce	
SetupBuilder.com	Finish Cancel
Identity Access	×
identity Access	^
This sys	stem must be restarted to complete the installation. This screen may not be
Press th	ne OK button to restart this computer. Press Cancel to displayed
return	If it is proce [OV]
	in it is, press [OK]
	OK Cancel
	Cancer

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

3. Launching the IA User Interface

Launching the User Interface -Select Start > Controlsoft > IA User Interface.

1. The following splash screen will be displayed:

IDENTITY ACCESS 9
Image: space with the spa
CONTROLSOFT [®] ¥
Loading Configuration

When initialised, the Logon screen will be displayed:

Identity Access Manageme	ent _ = X						
Logo	n						
Welcome to Iden Please enter you	ntity Access. r username and password.						
<u>U</u> sername							
<u>P</u> assword							
<u>L</u> anguage	English						
IMPORTANT Using this program constitutes acceptance of the licence terms and conditions as described in Help topics. © 2018 Controlsoft Ltd.							
Secure Log	jon Logon Cancel						

- 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**:

			Identity Access	Management				- 🗆 X
Home View Reporting Managem	nent Setup Advanced	Tools						^
Logoff Exit Dashboard About								
User Status 🔹 Access Log Alamis, Doors, System Status, Cameras, Thoor Plan.								
🥦 User Status	× @ Y							
ON SITE OFF SITE	Date	Time Last Name	First Name	Reader	Location	Token Number	Company	
0 0 Reset								Select Card Reader
Controller status								
ON LINE OFF LINE 0 0 Second Sync Time • Offline Controllers								Resder Montor 2 P Select Card Reader
Version 9.1.40 (SERVER)					Lockdown	Status: Level 0 🛛 🛹	Log Service 🏑 Downlo	ad Service 🧸 Admin 📷 Default 🔹 🏑

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