

Controlsoft Identity Access Management Software



IA Server Software Installation Guide v9 © 2020 Controlsoft Ltd

Controlsoft Identity and Access Management Software

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1. Introduction

The Identity Access (IA) Management Software from Controlsoft® is a PC-based Access Control Management system. The Identity Access software manages the access control database, which is downloaded to one or more Master i-Net® Controllers. The Master i-Net controls access through the doors, either directly or via expanders. The i-Net controller(s) make the decisions as to whether access is granted or denied.

This manual will take you through the process of installing the Identity Access software, and configure a basic system using the Wizards provided. For further information on more advanced installations, please refer to the document **IA Software Manual Iss 9**

The Identity Access software is available on a flash drive by ordering part number IA-LITE, or can be downloaded from our website www.controlsoft.com.

A license is required to enable more Advanced features, see **IA Software Manual Iss 9** for further details

1.1. PC Specifications

Recommended PC Specification

- Intel i5 processor @ 3GHZ
- 8GB RAM
- 100GB Free Disk Space
- 10/100 Network Card
- USB Port
- Screen Resolution = 1024x768 or better

Performance PC Specification (more than 10,000 users)

- Intel i7 processor @ 3GHZ
- 16GB RAM
- 250GB Free Disk Space
- 10/100 Network Card

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- USB Port
- Screen Resolution = 1024x768 or better

Operating Systems:

- Windows 10 (x64).
- Windows Server 2012 R2.
- Windows Server 2016

2. Installing Identity Access Software

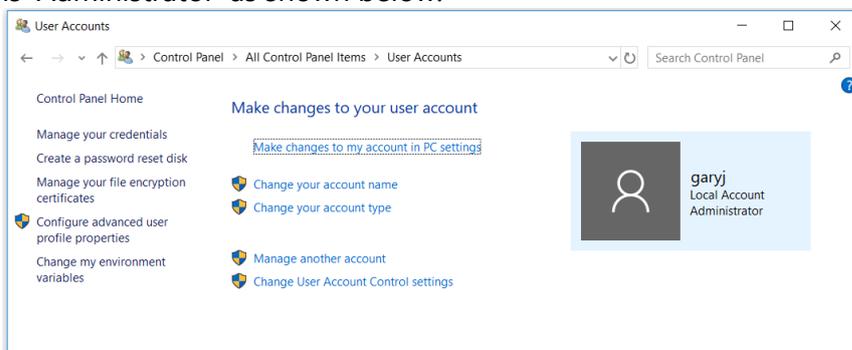
To ensure that your software is installed correctly, it is important to run through the following pre-installation checks.

2.1. Pre-install Checks

Before installing the IA Server, 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, 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.

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Finally, ensure that User Account Control (UAC) is set to "Never Notify", ensure that all Windows updates have been installed and temporarily disable your anti-virus software until installation is complete.

2.2. Install the Software

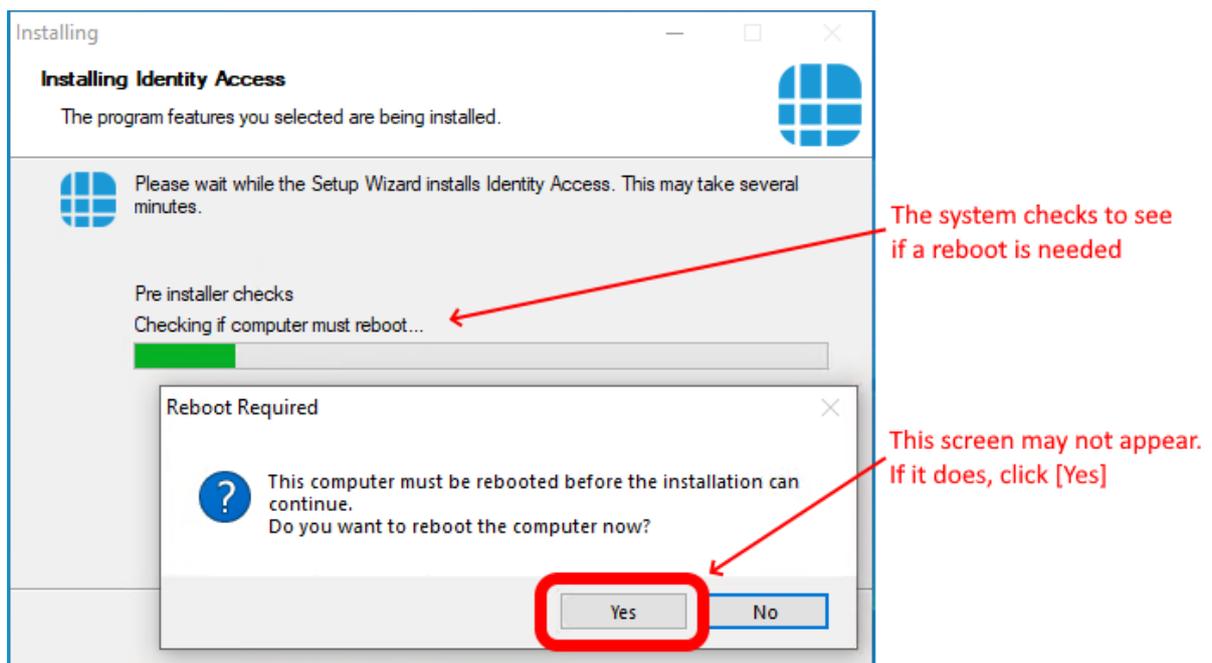
Insert the USB flash drive into a spare USB port and the AutoPlay screen will appear.

NOTE: If a message box appears stating Windows protected your PC, click on More info, then [Run anyway].

Select **Open folder to view files.**

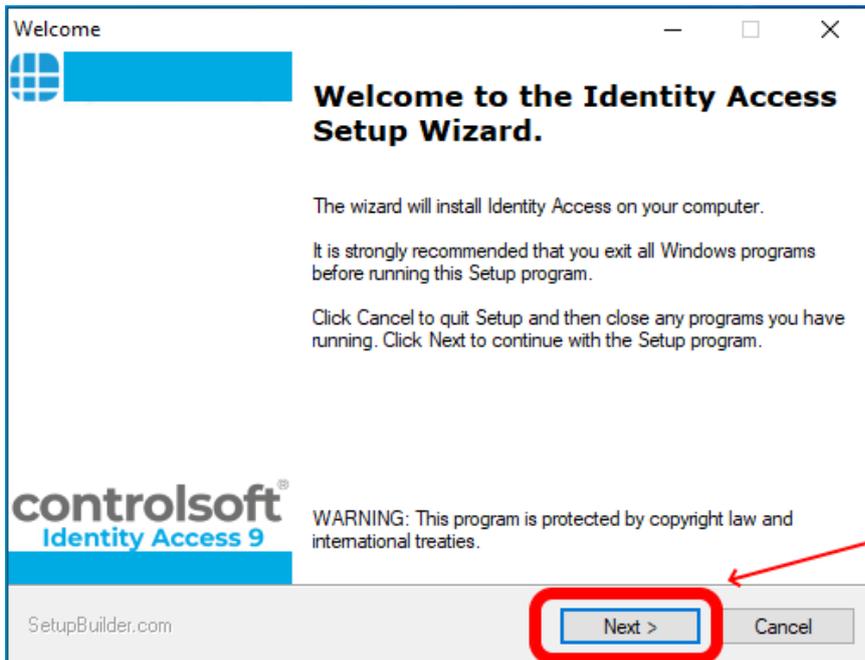
If your PC is not configured with AutoPlay, please browse to **My Computer /This PC** and double click the **IA Flash Drive** USB drive.

To start the installation, double click **Install_IdentityAccess.exe.**

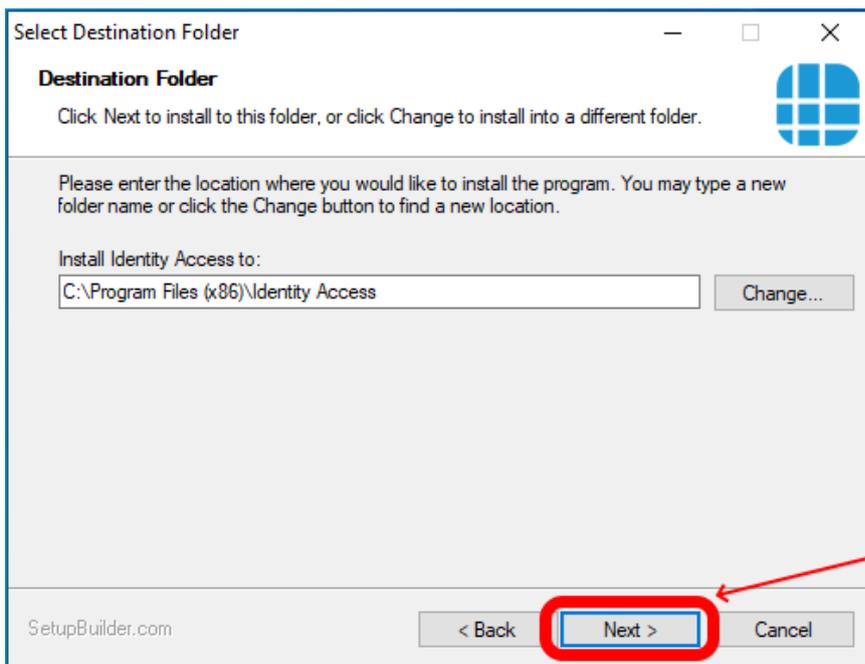


If the system reboots, the installation will recommence automatically.

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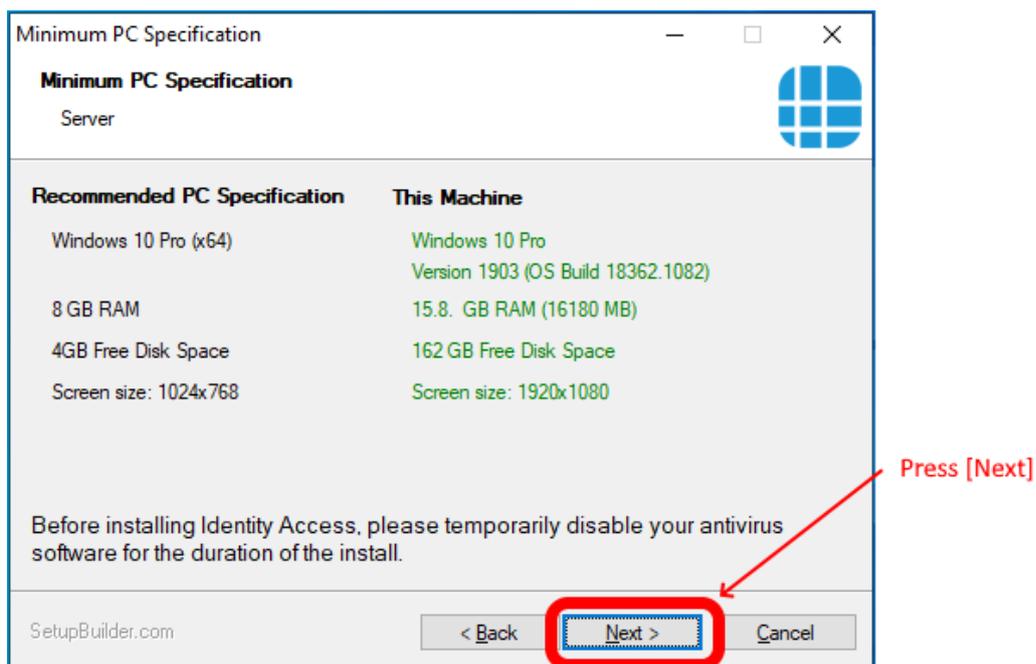
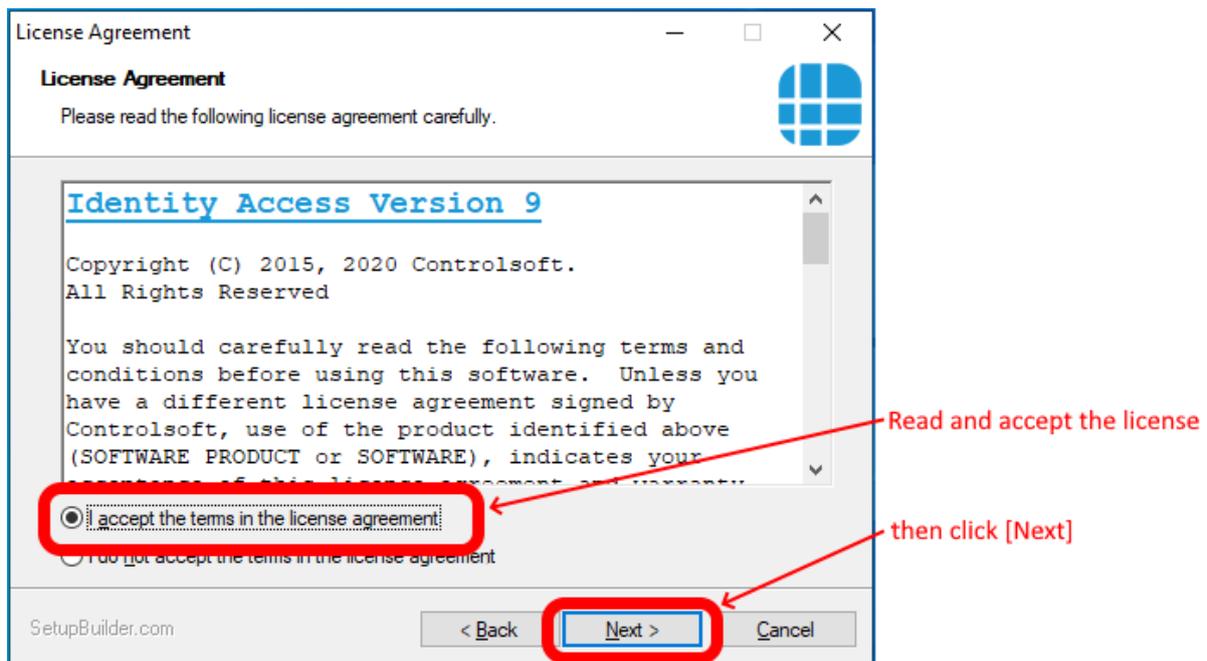


Press [Next] to continue



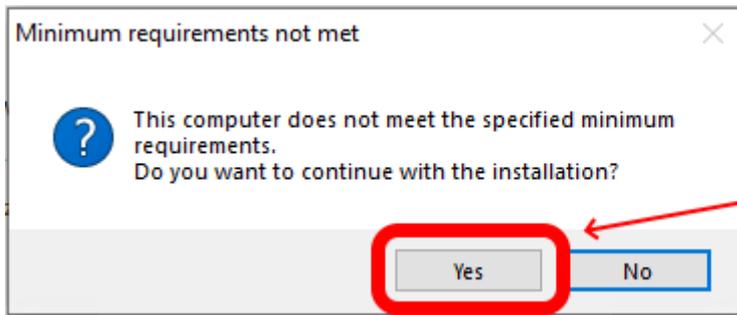
Press [Next] to continue

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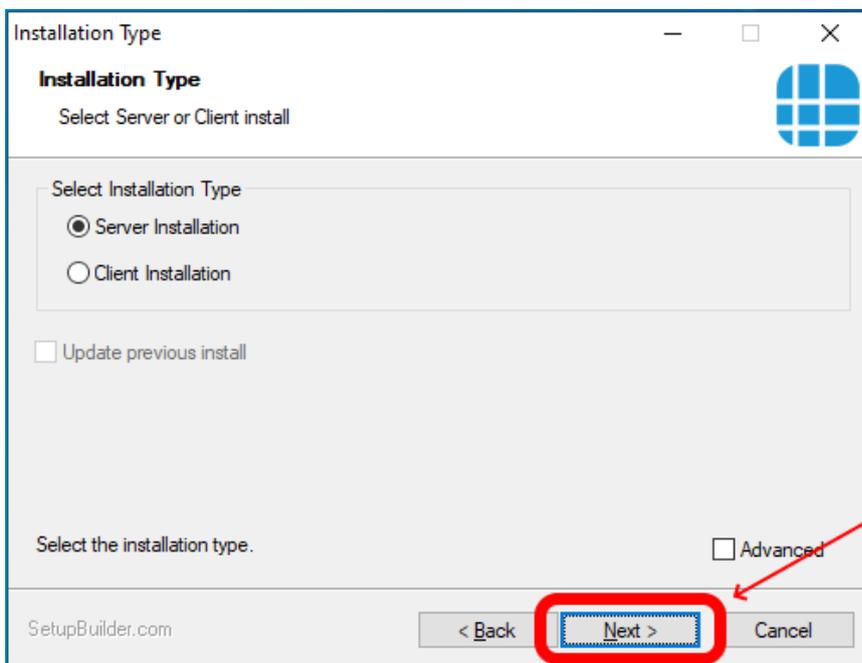
NOTE: If your system does not meet the minimum specification, the offending parameter will be displayed in red, not green. After pressing [Next], you will be warned again.

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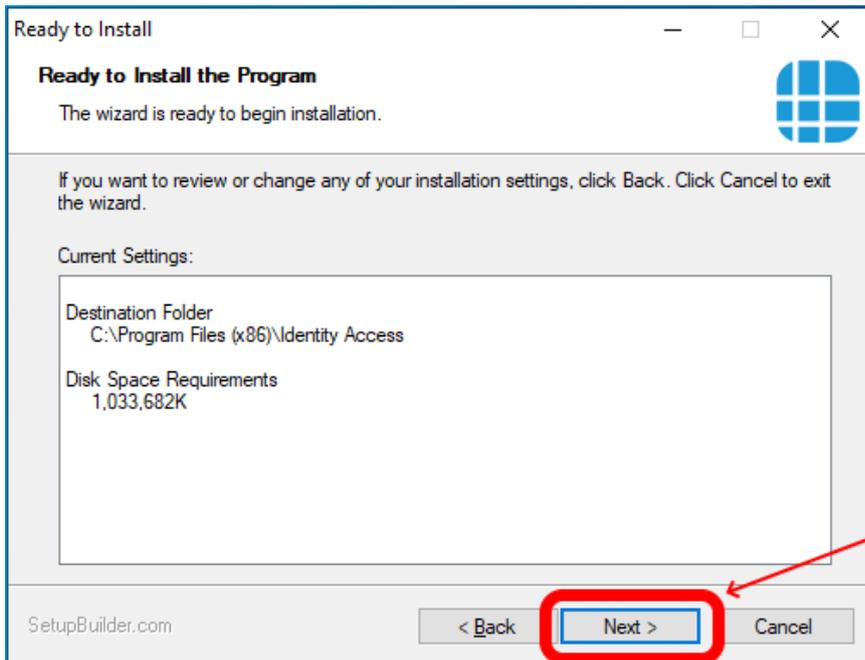
Press [Yes] to continue
(not recommended)

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

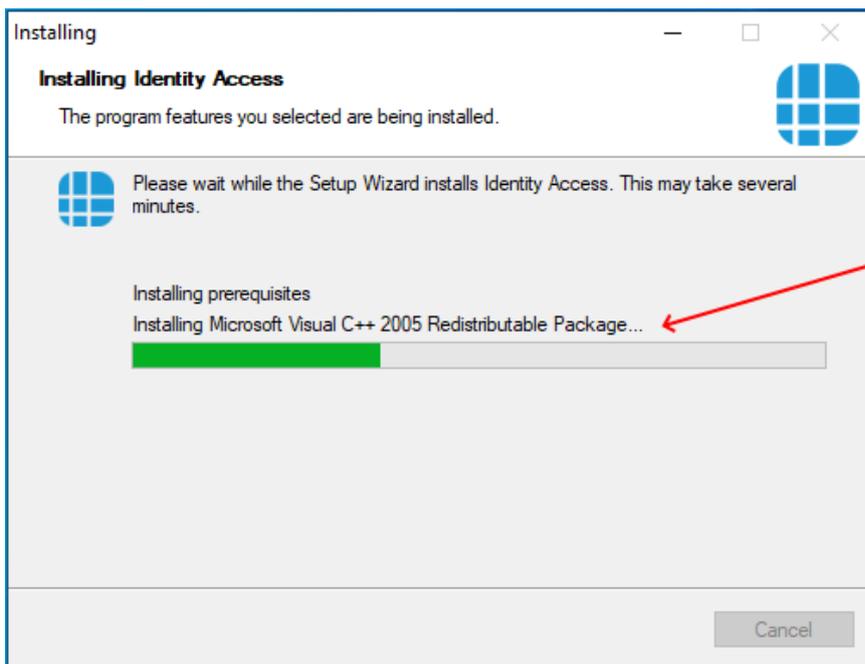


Press [Next] to install
the server software

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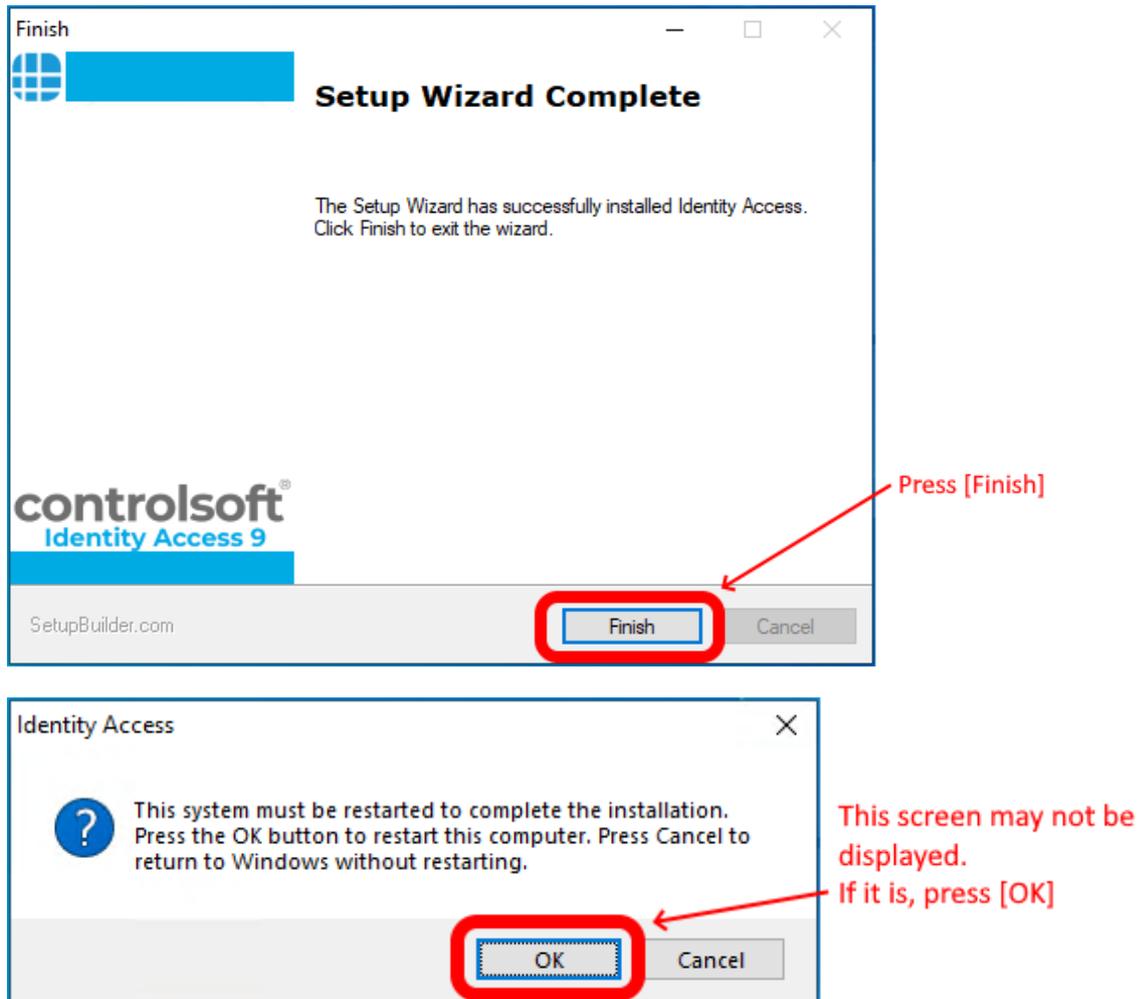


Press [Next]



Displays progress of install

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Following the installation of the software, you may notice a file called InstallUtil.InstallLog. If the installation was successful, this file can be deleted.

If you experienced a problem with the install, please do not delete this file as it may be required by Controlsoft Technical Support.

For further information on selecting Advanced installation options, please refer to the document **IA Software Manual Iss 9**

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

3. Preparing for IP Connection

For the PC and i-Net Controller to communicate over a TCP/IP network, the PC and each i-Net must be configured on the same IP range.

NOTE: A default i-Net Controller is configured for DHCP to enable the "Find IP Controller" wizard to detect the i-Net controller. By pressing the Reset button on the i-Net controller for 30 seconds, the IP Address will change to a fixed IP Address of 10.0.1.230

The procedure is to configure the PC to an IP Address on the same network segment as the i-Net (e.g. 10.0.1.200), then use Controlsoft's i-Net Configurator software to reconfigure each i-Net to an individual IP Address on the target network. If you are unsure which IP Address the i-Nets should use, please speak to someone from the site's IT department.

When all the i-Net Controllers have been configured, change the PC's IP Address back to its original settings.

NOTE: Controlsoft strongly recommend that, once configured, you use i-Net Configurator software to change the i-Net to a fixed IP Address to maximise the long term reliability of the connection.

3.1. Configure the PC

To communicate with the i-Net over a TCP/IP network, the PC and i-Nets must be configured on the same IP range.

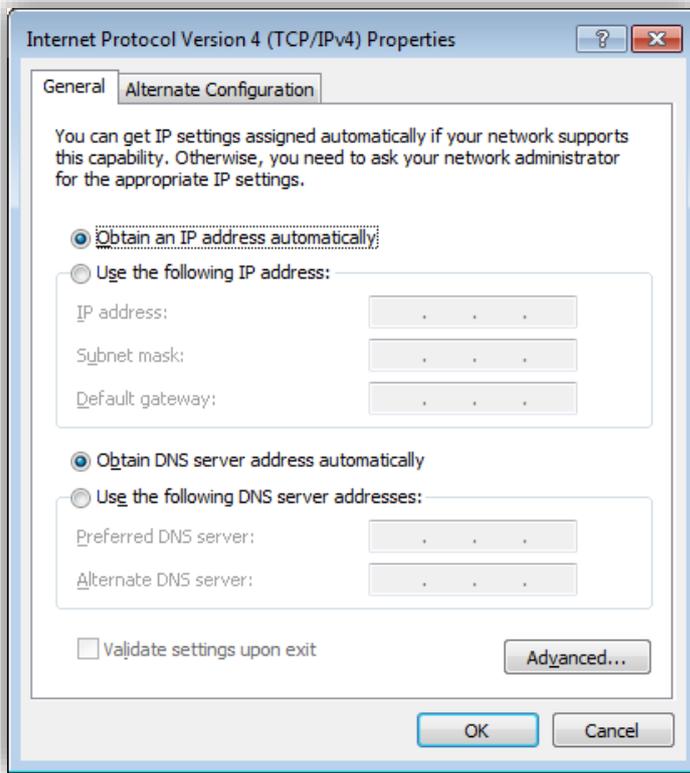
Click on the Start button and select **Control Panel**.

Select **Network and Sharing Center** then select **Change adapter settings** in the left column.

Double click on the relevant network connection, then click on **[Properties]**.

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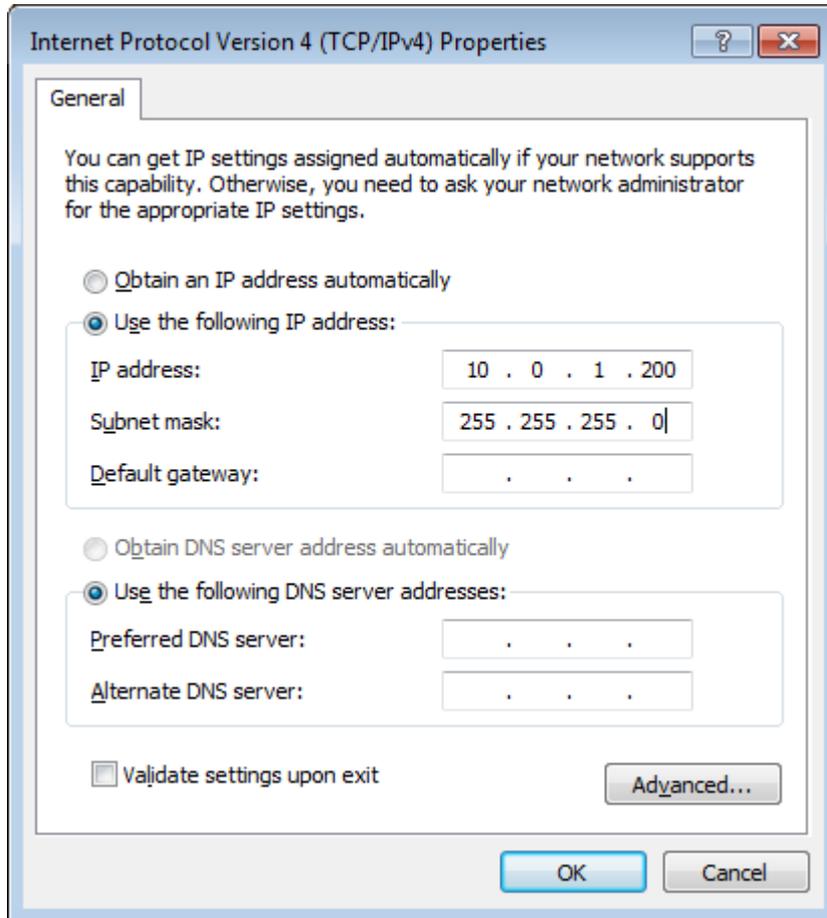
Double click on **Internet Protocol Version 4 (TCP/IPv4)**.



The IP Address needs to be set to an address in the same range as the default IP Address of the i-Net Controller (default = 10.0.1.230).

Click on **Use the following IP address** then enter the desired IP Address (e.g. 10.0.1.200).

Enter the Subnet Mask as 255.255.255.0



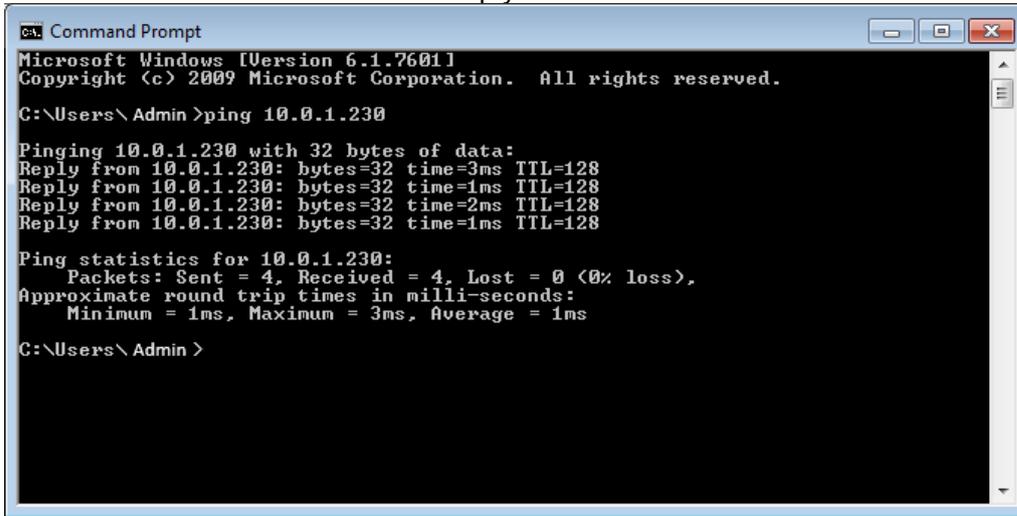
Click on **[OK]**, **[OK]**, **[Close]**, then close the Network Connections window.

3.2. Ping the i-Net Controller

To confirm that you are able to communicate with an i-Net Controller which is connected to the PC via IP, simply issue a 'ping' command:

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1. Run the **Command Prompt**, then enter the command `ping 10.0.1.230` and confirm that the i-Net Controller is able to reply:



```
ca. Command Prompt
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Users\Admin>ping 10.0.1.230

Pinging 10.0.1.230 with 32 bytes of data:
Reply from 10.0.1.230: bytes=32 time=3ms TTL=128
Reply from 10.0.1.230: bytes=32 time=1ms TTL=128
Reply from 10.0.1.230: bytes=32 time=2ms TTL=128
Reply from 10.0.1.230: bytes=32 time=1ms TTL=128

Ping statistics for 10.0.1.230:
    Packets: Sent = 4, Received = 4, Lost = 0 (0% loss),
    Approximate round trip times in milli-seconds:
        Minimum = 1ms, Maximum = 3ms, Average = 1ms

C:\Users\Admin >
```

2. If the i-Net controller does not respond, check the network wiring between the PC and the controller.
3. If the i-Net is not new, it is possible that the IP Address is not set to the default value (10.0.1.230). To default the IP Address, press the Reset switch on the board and hold it in for 30 seconds. Wait for the i-Net Controller to reboot, then try and ping it again.

If in any doubt about IP Addresses to be used, please contact the system administrator.

3.3. Assigning a Fixed IP Address using i-Net Configurator

Before assigning IP Addresses to the i-Net Controllers, first contact the IT department for the site and obtain IP addresses for each of the controllers installed.

NOTE: i-Net controllers MUST be configured with FIXED IP Addresses for maximum network reliability.

To run the i-Net Configurator software, select

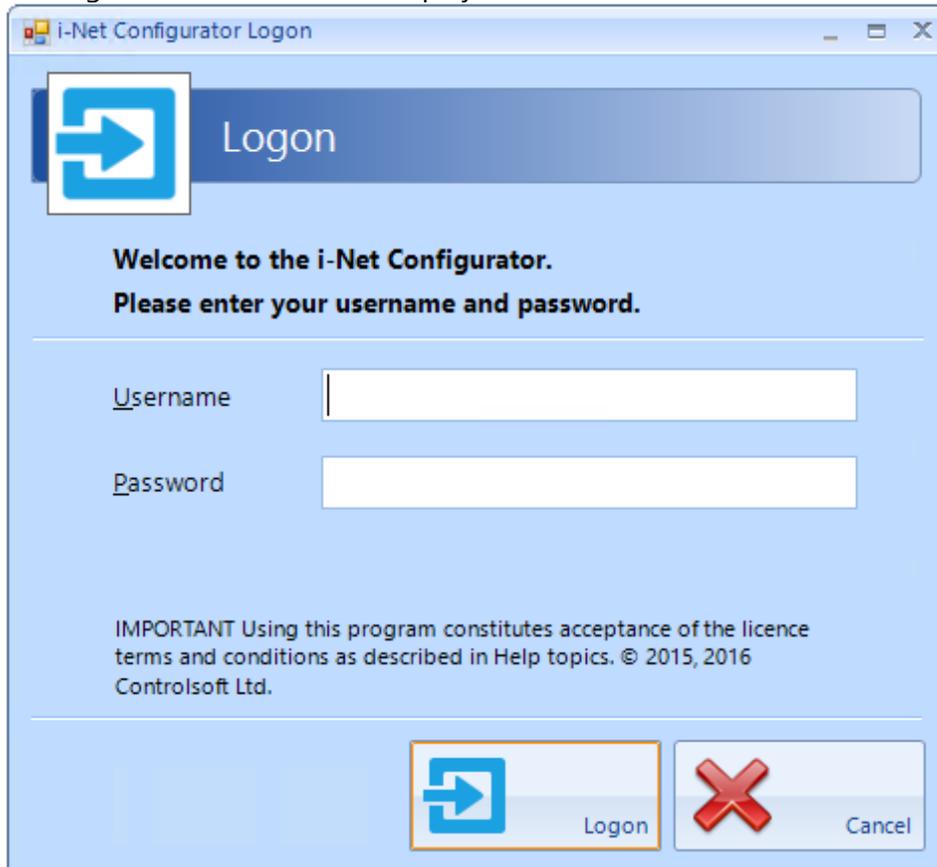
Start > Controlsoft > Identity Access > Tools > i-Net Configurator > i-Net Configurator

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i-Net Configurator can also be run from within IA by selecting a controller in the Controller Manager window and clicking the icon



The login screen will then be displayed:



NOTE: The default login credentials are Username = Admin, Password = Password. These login credentials are case sensitive. If i-Net Configurator is run from within Identity Access, login credentials are NOT required.

NOTE: i-Net Configurator can be run as a standalone application so does NOT use Identity Access login credentials

Connect one i-Net to the network and ping it to confirm that a connection is possible.

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Enter the IP address of the i-Net in the **Controller IP Address** field, leaving the **Select Mode** field as Basic Configuration. Click the **[Connect]** button.



The **Controller IP Address** defaults to the i-Net default of 10.0.1.230 unless i-Net Configurator has been run from within Identity Access as in this example where this field shows the IP Address of the selected controller.

Select mode should be left as **Basic Configuration** unless instructed by Controlsoft Technical Support

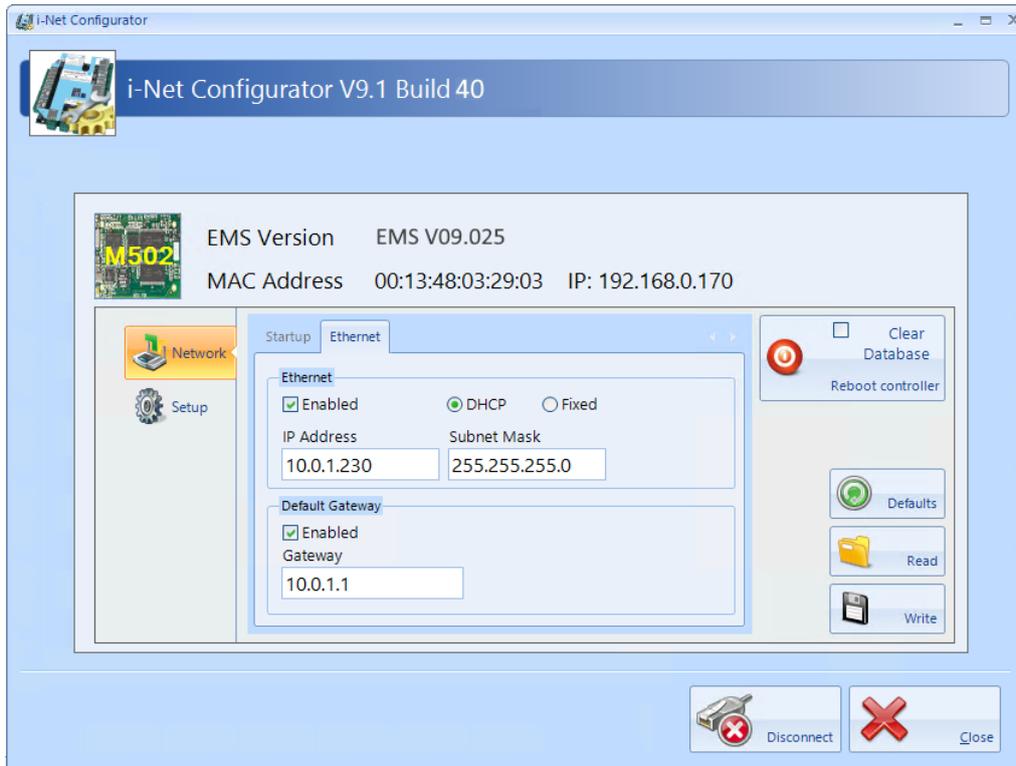
The **[Settings]** button is used to change the login credentials for i-Net Configurator.

Click the **[Connect]** button to connect to the controller. The blue 'wire' will turn red if the software cannot connect the controller, or green if it does connect.



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When connected, the following screen is displayed:



The top section of the screen shows the type of i-Net in use. This will either be M501 (i-Net fitted with an older green processor board) or M502 (i-Net fitted with a newer blue processor board).

This section also shows the **EMS Version** (the firmware in the i-Net) as well as the i-Net's **IP Address** and **MAC Address**.

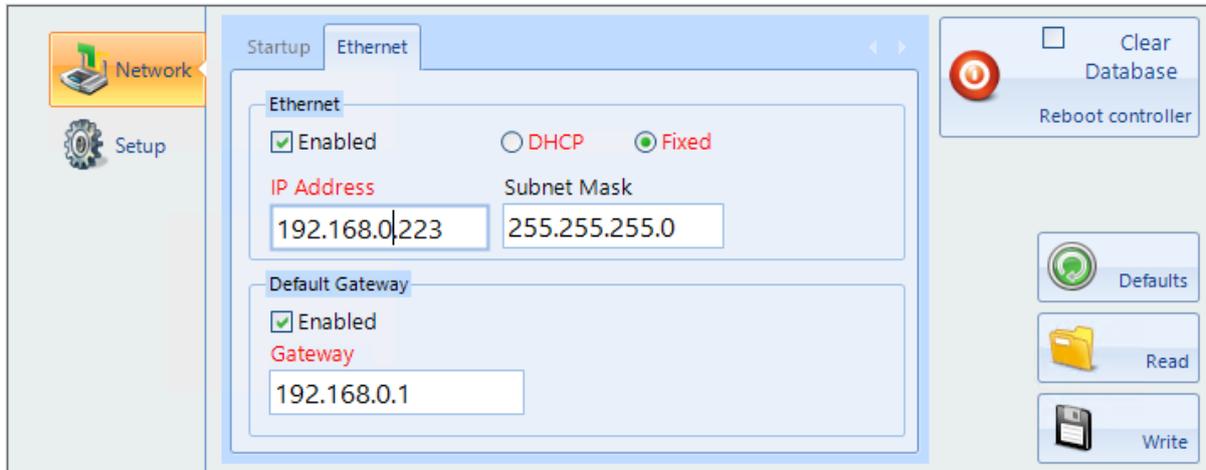
Network tab:

Ensure that under **Ethernet**, the option **Enabled** is ticked. From the factory, i-Nets are configured for **DHCP** which means that they are allocated an IP Address by the router when they power up. This makes it easy to find using Identity Access' "Find Controller" feature. Once found, the **Ethernet** setting MUST be changed to **Fixed** to avoid connection problems in the future.

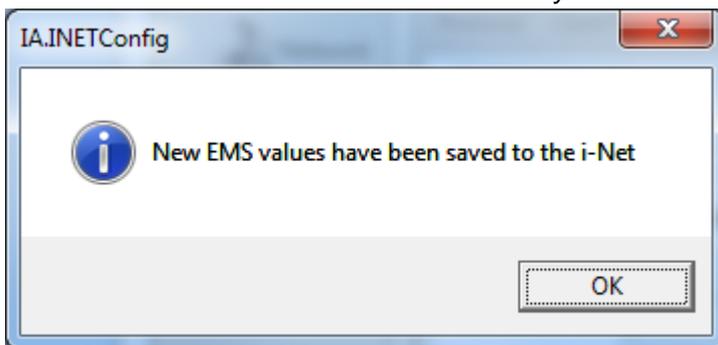
Enter the required **IP Address** and **Subnet Mask**. These are usually provided by the customer's IT Department. When a change is made, the title will change to red to indicate

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that the setting has been changed.



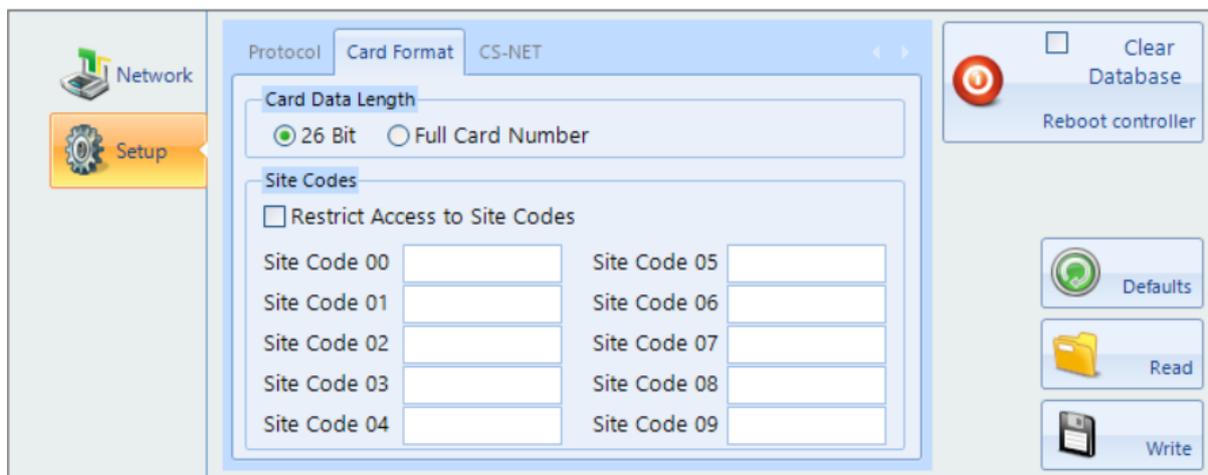
Finally, click on the **[Write]** button to write the new values to the i-Net. A dialogue box will indicate that the data has been successfully written



After changing the IP Address of the i-Net, the controller must be rebooted to implement the new IP Address. This can be achieved by clicking the **[Reboot controller]** button. If **Clear Database** is selected, the database in the i-Net will be wiped prior to the reboot.

Setup tab:

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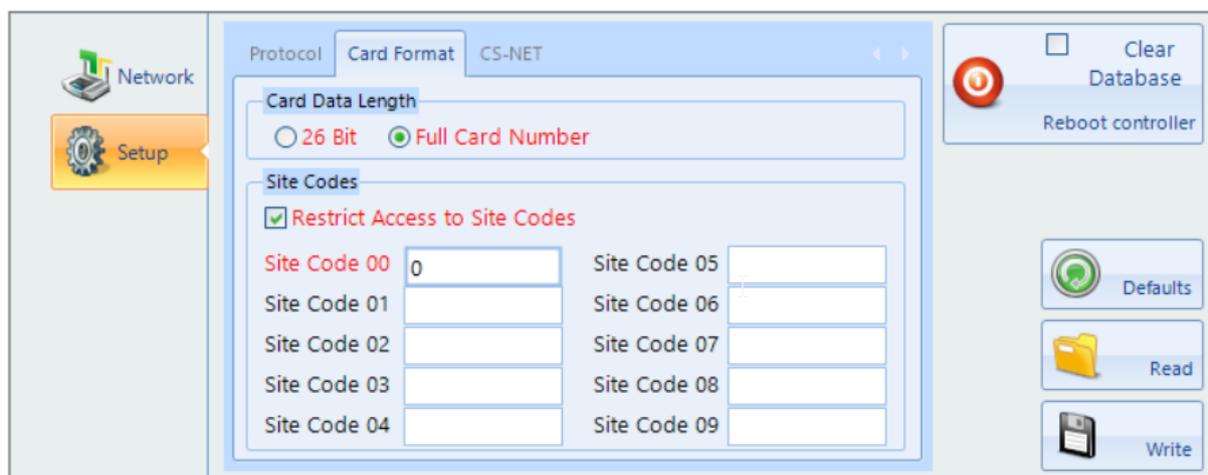


Card data length. When set to **26 bit**, the data from the card will be stripped down to 24 data bits, plus 2 parity bits. When set to **Full Card Number**, the whole card number (e.g. 34-bit, 47-bit, 56-bit) will be used.

SITE CODES:

This feature increases the security of the system when used with HID readers and certain card formats. The card data is split into 2 parts – the site code and the card number. If the i-Net controller is not configured with the same site code as used on the cards, the card number is ignored. Providing the site code in the card and in the i-Net match, the card number is used to grant or deny access.

- **Restrict access to site codes** – enable this option to use site codes
- **Site code 00** to **Site Code 09** – the i-Net controller can support up to 10 different site codes simultaneously. For example, to use cards with site code 0, the i-Net should be configured as follows:



NOTE: Most sites will only use one site code.

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After making any changes, click the **[Write]** button to download the changes to the i-Net.

Other buttons available in i-Net Configurator Network and Setup tabs are:

[Defaults] – click this button to set all parameters to default values.

[Read from i-Net] – click this button to read all values from the i-Net controller

[Write to i-Net] – click this button to write all values to the i-Net controller

NOTE: when changing the IP Address, the i-Net controller must be rebooted AFTER writing the settings to the i-Net. This can be done by clicking the **[Reboot controller] button.**

4. Starting the Identity Access Software

To launch the Identity Access software:

Start Identity Access as follows.

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

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The following splash screen will be displayed:



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When initialised, the Logon screen will be displayed:



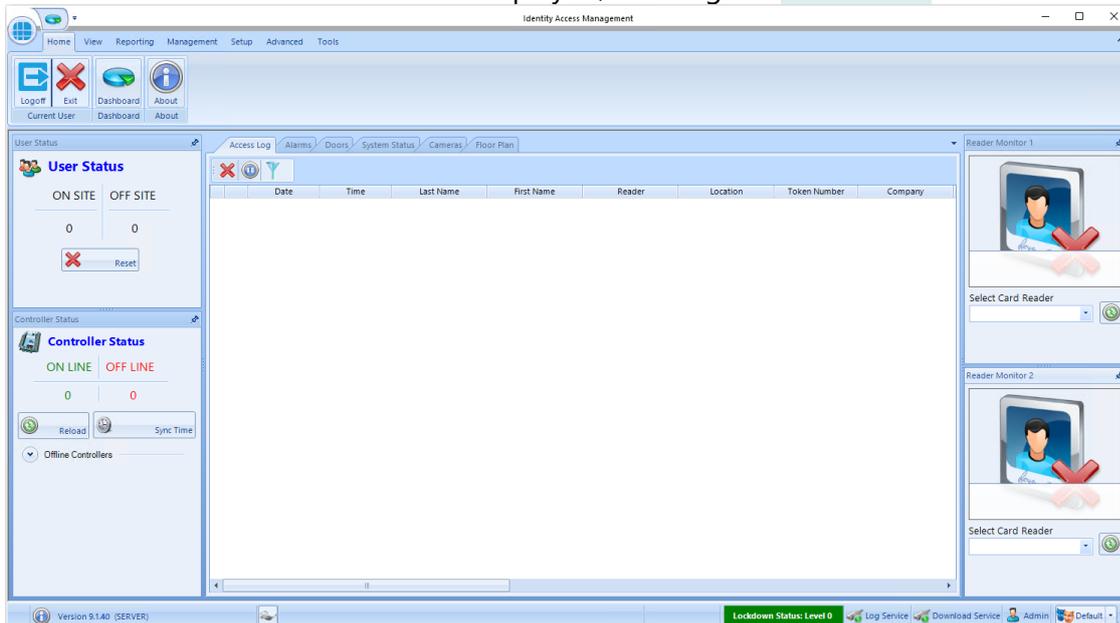
The screenshot shows a window titled "Identity Access Management" with a "Logon" header. Below the header, it says "Welcome to Identity Access. Please enter your username and password." There are three input fields: "Username", "Password", and "Language" (set to "English"). At the bottom, there are three buttons: "Secure Logon" (with a hand icon), "Logon" (with a blue arrow icon), and "Cancel" (with a red X icon). A disclaimer at the bottom reads: "IMPORTANT Using this program constitutes acceptance of the licence terms and conditions as described in Help topics. © 2018 Controlsoft Ltd."

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.

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



5. Configuring the Access Control Hardware

The procedure for configuring a basic Access Control system in the Identity & Access software is as follows:

1. Configure the Master Controllers (Installer function)
2. Configure the Doors and Readers and link them to the relevant Master Controllers (Installer function)
3. Configure Groups and link them to Readers (Installer or End User function)
4. Configure Employees, Visitors and/or Contractors and allocate them to the relevant Group/s (Installer or End User function).

6. Configuring Master Controllers

Within Identity Access, select the **Setup** tab, then click **Controllers** in the ribbon bar.

6.1. Find IP Controller Wizard

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Select the **Find IP Controller Wizard**.

Select the **Start IP Address** and **Stop IP Address** to define the range to be scanned:

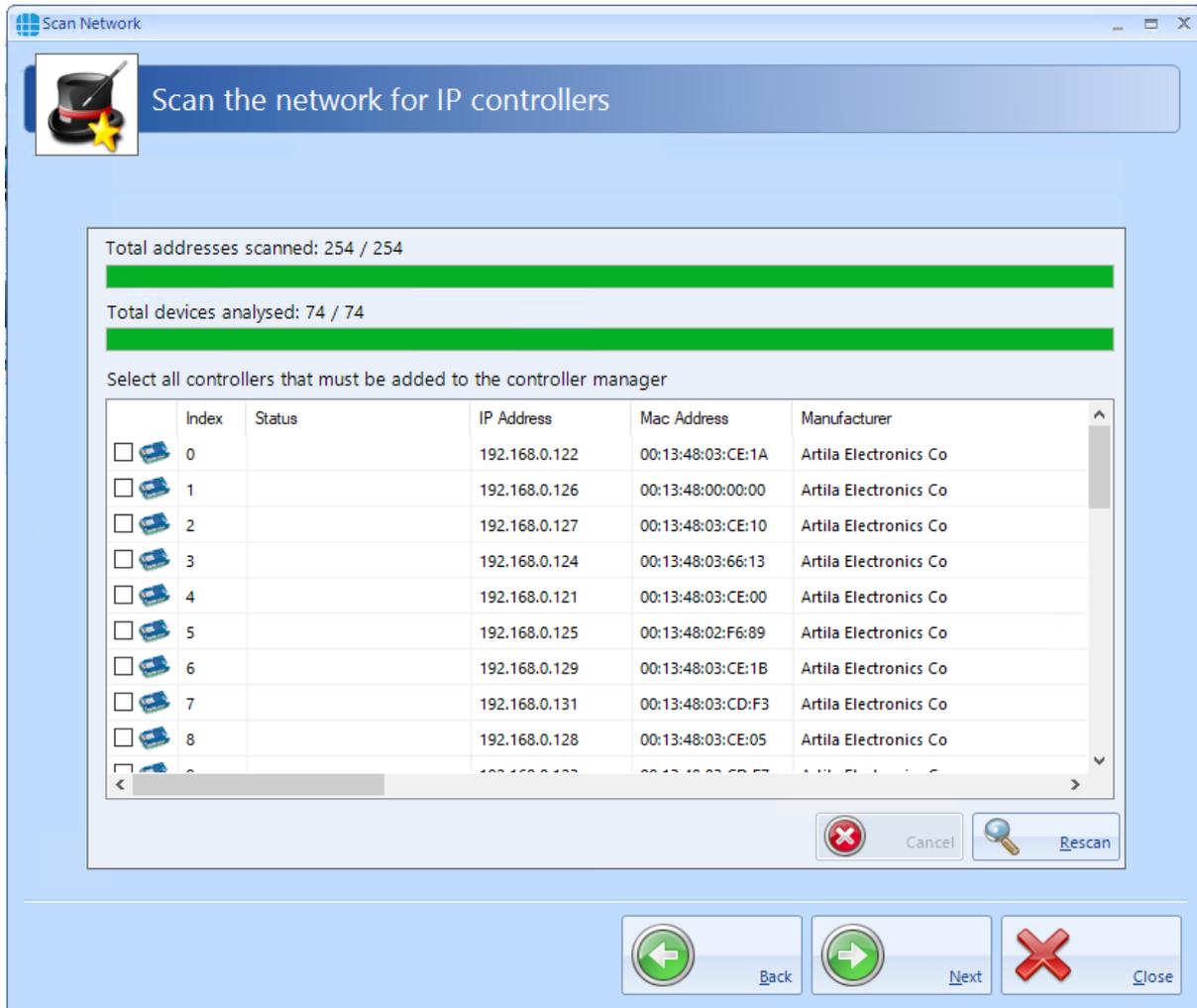
IP Address	Network Mask	Start Address	End Address	Number of addresses
192.168.0.172	255.255.255.0	192.168.0.1	192.168.0.254	254

Start IP Address
192.168.0.1

End IP Address
192.168.0.254

Back Next Close

The software will then find all i-Net Controllers within that range.

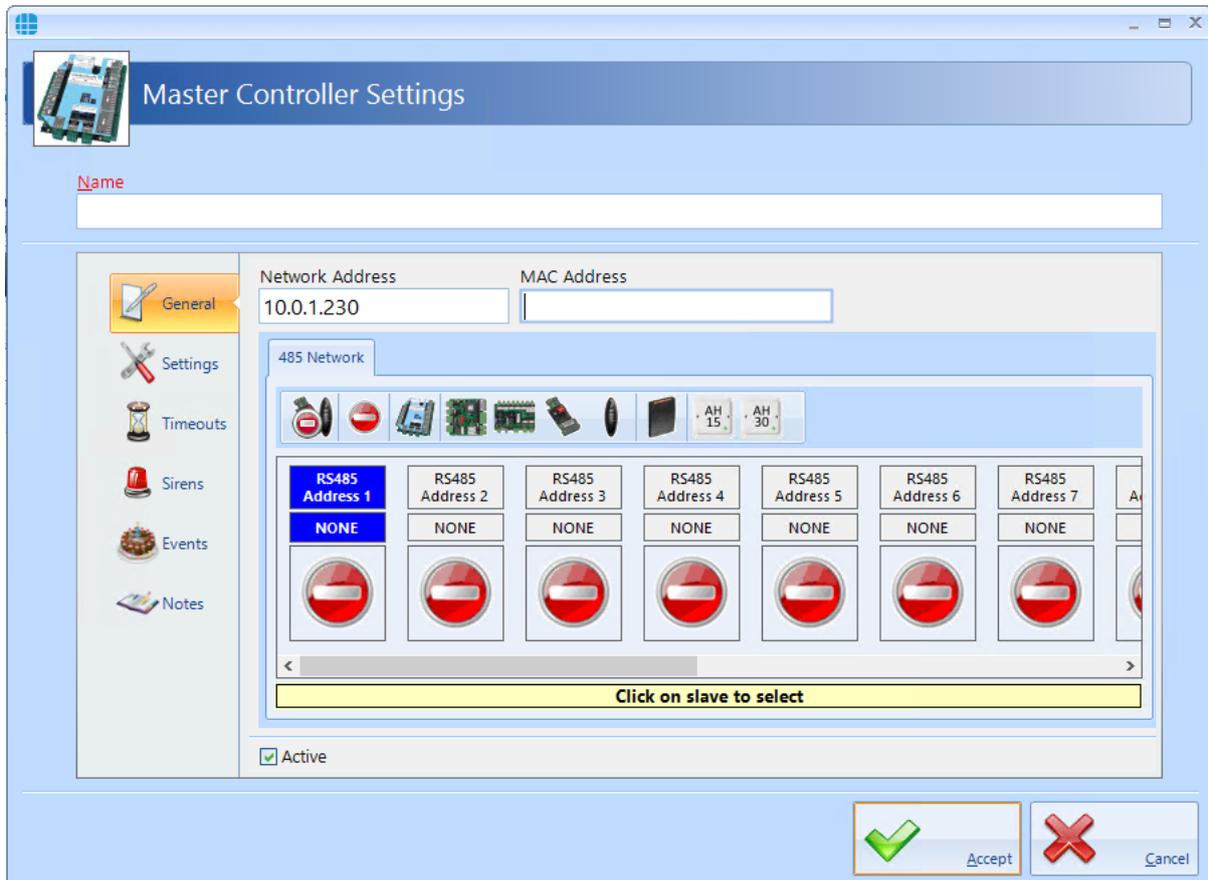


Select the controller/s to be added to the system, then select **[Next]**, followed by **[Finished]**. These controller/s will then be added to the list of available controllers.

6.2. Controller General

Double click a controller in the Controller list. The **General** tab in the **Controller Properties** window displays the basic properties of the Master Controller.

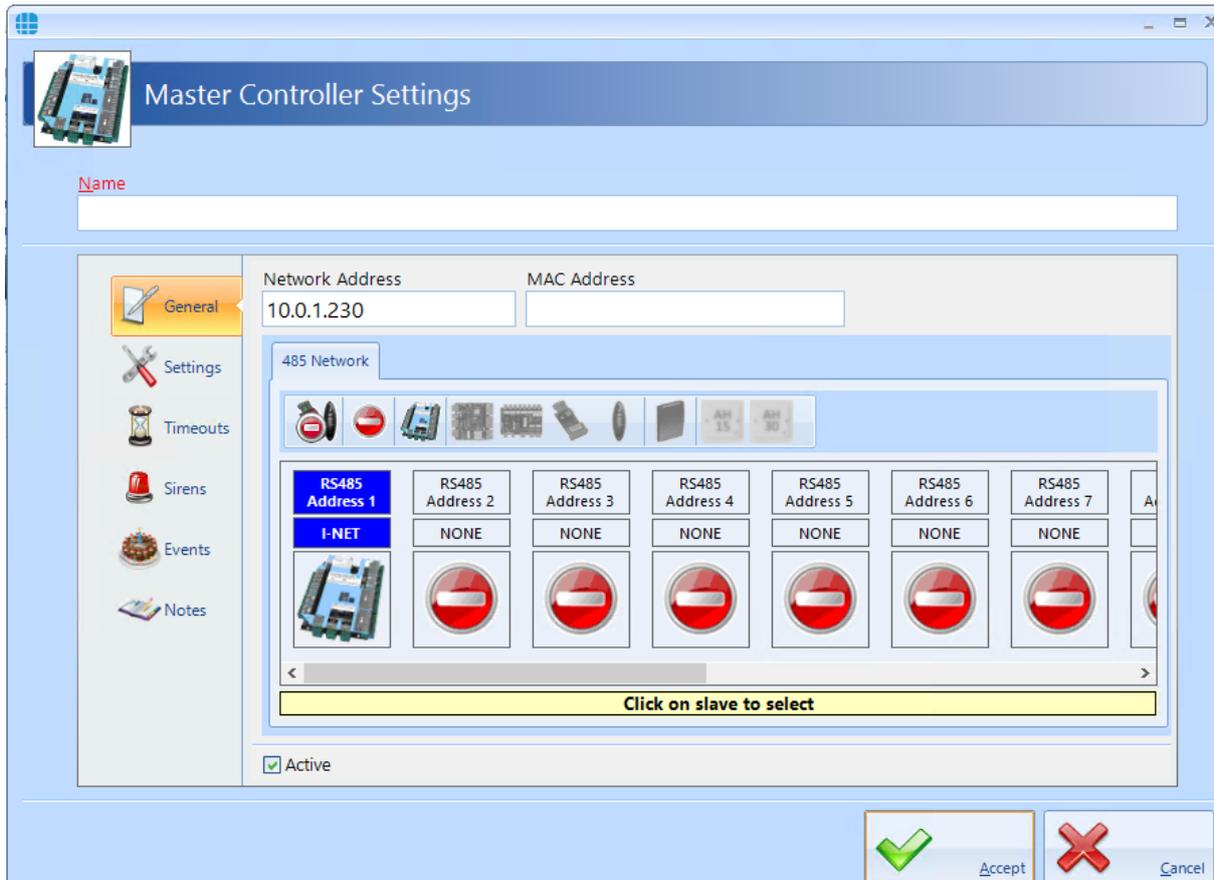
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Enter a **Name** to identify the controller (e.g. Ground Floor).

The **IP Address** and **MAC Address** fields will have been populated by the previous Wizard.

It is then possible to define the type of expansion used on that Master Controller. To add a slave controller on the RS485 bus, highlight the relevant RS-485 address then use the icons above to select the type on control unit.



This information will then be used during the programming to define which inputs, outputs etc. are available for use.

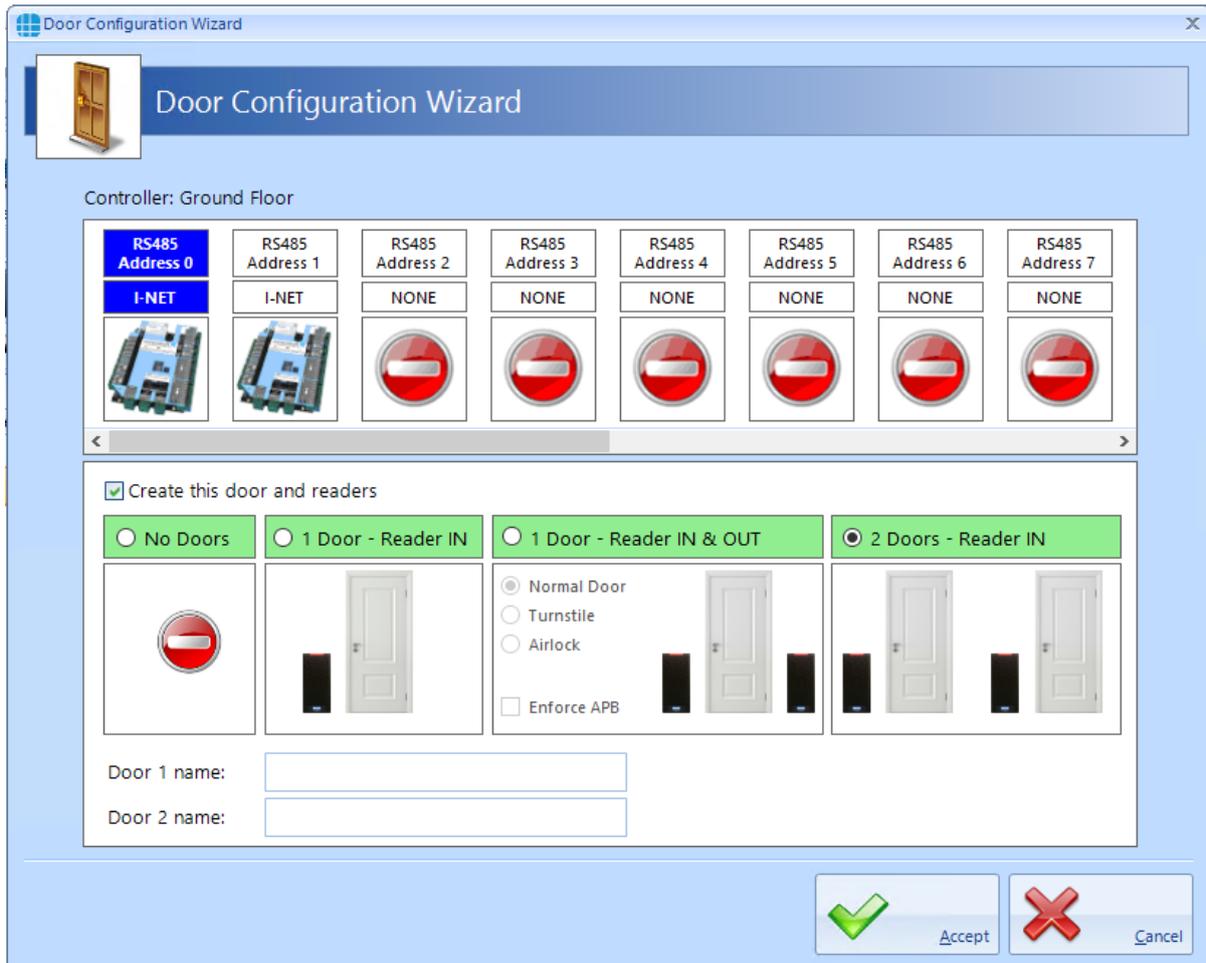
6.3. Door Configuration Wizard

The Door Configuration Wizard greatly simplifies the process of setting up the doors. The simplest way to use this wizard is to connect the hardware using default settings:

- Door 1 = Relay 0 (Lock); Input 0 (REX); Input 1 (Door Contact); Reader 1
- Door 2 = Relay 1 (Lock); Input 2 (REX); Input 3 (Door Contact); Reader 2

Having configured the Master Controller, activate the Door Configuration Wizard by

selecting the Door Configuration Wizard icon  .



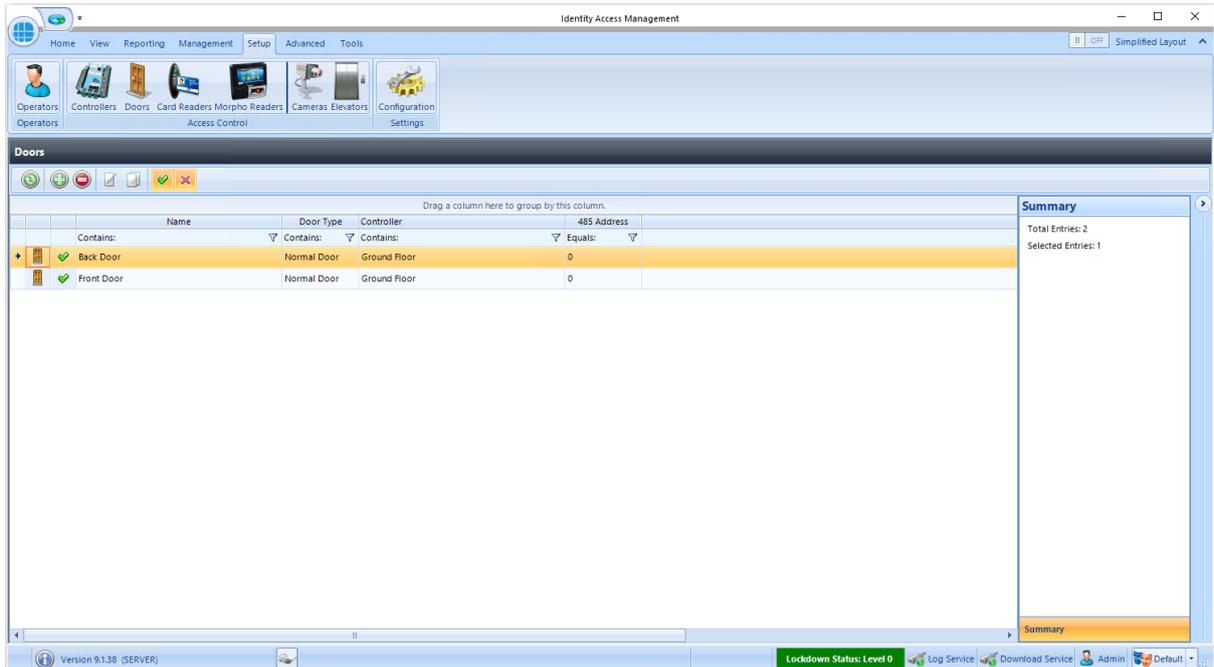
Select the Master controller then select appropriate option whether the controller is connected to 1 door with an IN reader, 1 door with IN and OUT readers, or 2 doors with IN readers (as in the above example). When the required option is selected, the tickbox **Create this door and readers** will be automatically selected.

NOTE: Turnstile, Airlock and Enforce APB are greyed out in this example as these options are only available when an Identity Access Professional License or Enterprise License has been applied.

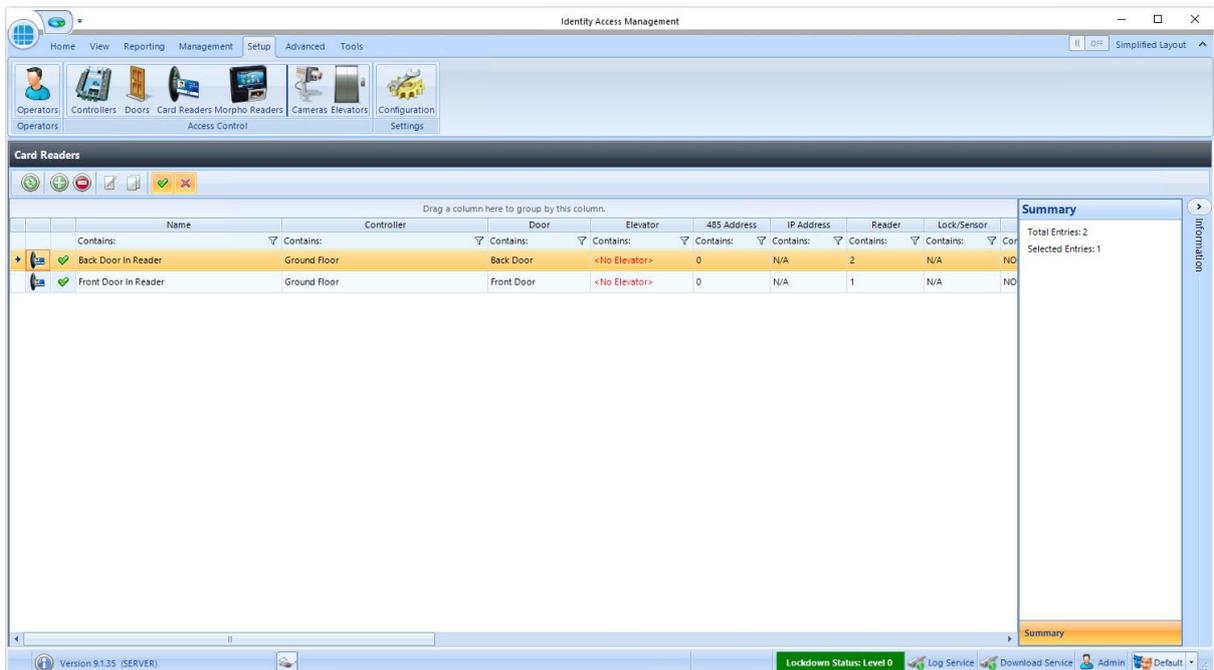
Enter name/s for the door/s to be created and click **[Accept]**.

Having created the 2 doors, selecting the **Doors** icon will then display the doors on that Master Controller.

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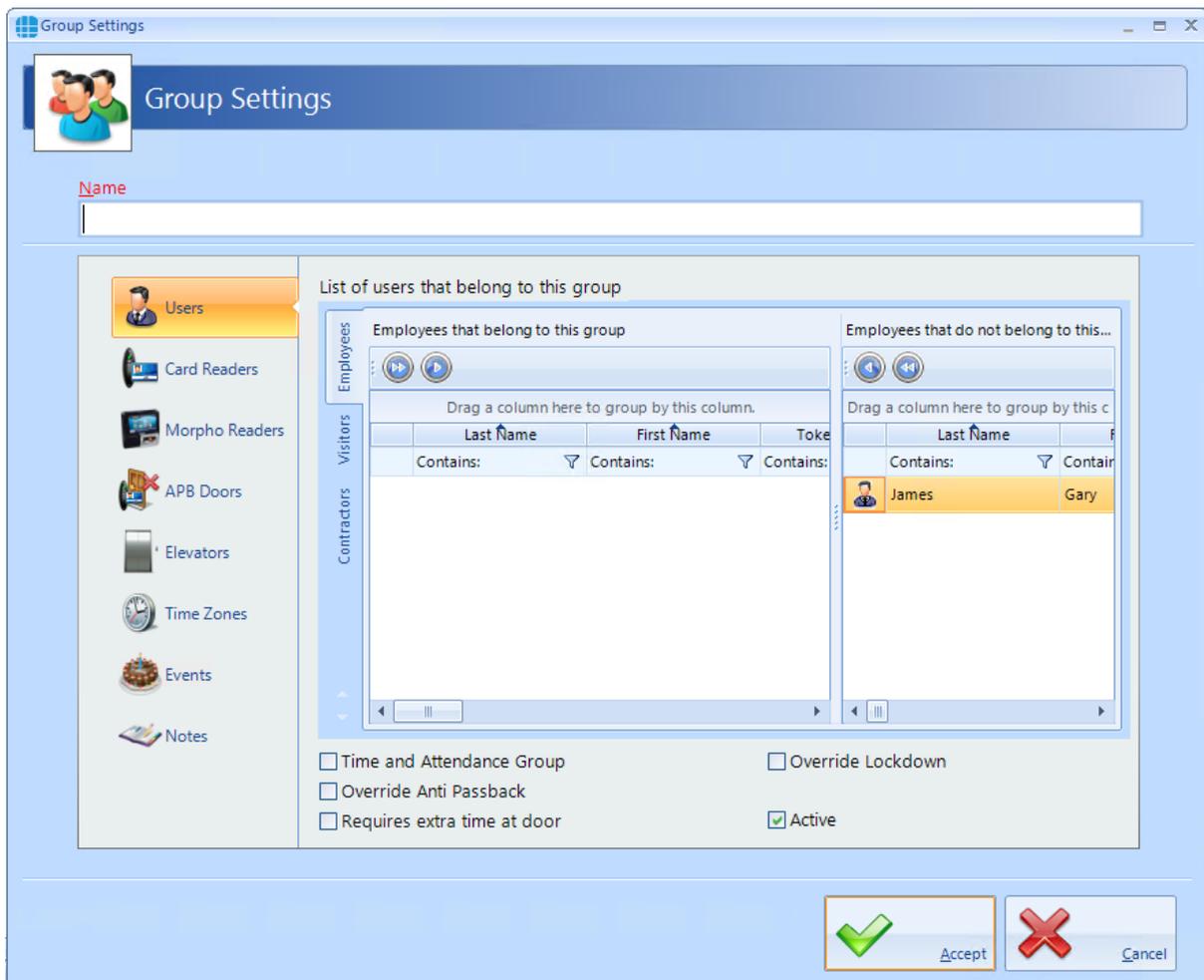
Checking the **Card Readers** window will also display the card readers created by the Door Configuration Wizard.



7. Configuring Groups

To create a new Group, select the **Management** Tab, then select **Groups** from the ribbon bar and press the "Add New" button .

To configure the Group, use the Group Properties Window:



Enter a **Name** for the Group.

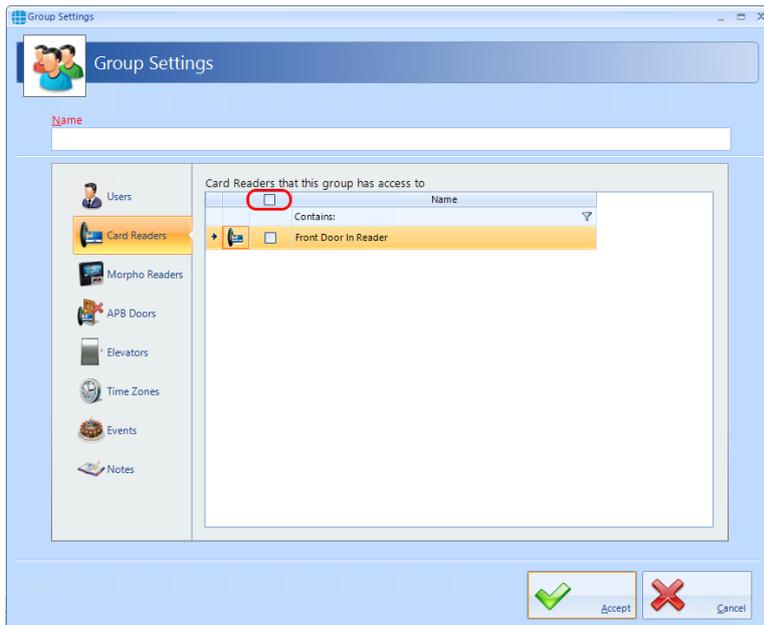
Employees that belong to this group displays all users who are currently allocated to the group.

Employees that do not belong to this group displays all users who are NOT currently allocated to the group

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To allocate or de-allocate users to the Group, simply select one or more users and click  or  to move them between the windows. Alternately, click  or  to move ALL users between the windows.

Select **Card Readers** in the side menu:

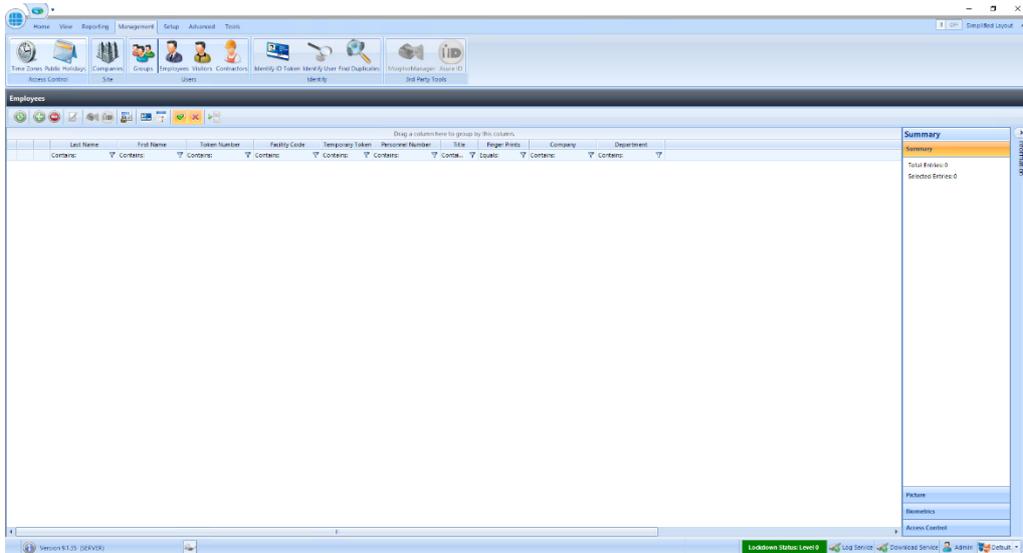


Select the readers that members of this Group will have access to. To select all readers, tick the **All** box (highlighted above).

8. Users

Select the **Management** tab, then select **Employees** from the ribbon bar:

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To create a new Employee, select the **Add New**  button:

Enter the **First Name** and **Last Name** of the user.

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Enter the **Token Number** of the card allocated to this user. This may be written on the card, read via an Enrolment reader, or may be a sequential number in systems using fingerprint only. Pressing the icon to the right of the Token Number field will automatically generate a token number. This is useful when using fingerprint readers.

Groups that this user belongs to lists all the available Groups within the system. To allocate the user to a group, simply tick the box for that group (this can also be achieved from within the Groups Properties).

Finally, click **[Accept]** to save the information and update the relevant controllers.