CS Gold® AdminWeb™
Software User Guide

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CS Gold® WebManager Software
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1 Introduction

CS Gold® AdminWeb™ software is a web solution for most common CS Gold administrative functionality. Functionality for each administrator is based on the functionality provided via the desktop client interface and includes patron management, access management, reader status, remote door, and reports.

- **Patron management** includes the ability to view pertinent patron information and manage patron group assignments, meal plans, stored value/credit plans, and transactions.
- **Access management** allows those with the privileges the ability to add/modify/remove patron groups, schedules, and calendars. This includes patron group memberships as well as location assignments.
- **Reader status** allows administrators to see the status of assigned locations.
- **Remote door** (door viewer) allows administrators to check current status of doors, view recent activity, and lock/unlock doors.
- **Reports** provides all reports that are available with the desktop interface.

There are a few features that are not yet available via the web interface, including:

- SQL Interface
- Conferences
- Alarms
- Offline Door Management

You may use both interfaces to perform your duties. Be aware that the desktop client continues to require a separate password, not synchronized with O-Key.

The web interface utilizes your O-Key shortname and O-Key password for authentication. It is accessible from the OSU domain, so you may perform functions remotely, after logging into the OSU domain via [https://osuvpn.okstate.edu](https://osuvpn.okstate.edu).

2 Log In

Use the following procedure to log into the CS Gold WebManager software:

1. From a Web browser, enter **stwcsgoldweb.ad.okstate.edu** and press Enter. The Login page is displayed.
2. **Mobile Device** login limits functionality. Choose **Full Site** at the bottom of the window (circled below) to enable all functions.

![Login Page](image)

3. Enter your O-Key shortname and O-Key password, and then click **Submit**. The **Welcome to CS Gold Menu Web** page is displayed.

![Welcome to CS Gold Menu Web](image)

Click the **Toggle menu** icon to the right of the menu items (circled in orange) to hide or show the menu.

If you belong to more than one IUG, a **User Group** field will be displayed in the upper-right corner of Admin Web pages and the IUGs you belong to will be displayed in the drop-down list. The IUG you have selected before you log out will be the IUG that is displayed in the **User Group** field the next time you log in.

**Note:** The Menu options depend on the **User Group** being used.
3 Patron Lookup

The Web version of the Patron Lookup GUI allows you to maintain the following information:
- General patron
- Meal plan
- SV&C plan
- Flag settings
- Access assignments

1. From the Admin Web menu, click Patron Lookup. The Patron Lookup General Info tab is displayed.

   **Note:** Use CWID wherever PIK is referenced.

2. Search for a patron.
   - **PIK:** Enter all or part of the patron institution key (PIK) and click OK. The patrons who match the PIK are displayed (PIK=CWID).
   - **Last:** Enter all or part of the last name. The system will automatically search for and display the patron names that match the last name.
   - **First:** This read-only field is populated after a patron is selected.

   **Note:** If only one match is found, the patron information automatically populates the fields.

3. You can also use the Advanced Search feature to search for a patron.
Click "+" to add another search line. Click "−" to remove a search line.

- **Match**: Select **All** or **Any** to specify whether you want your search to match all or any of your selections.
- **Clear**: Click **Clear** to remove selected options.
- **Search**: Click **Search** to initiate the patron search.
- **Patron Media**: Select the appropriate media from the drop-down list, enter a partial media value, and then select a search method from the drop-down list.

A search on encrypted media types requires an exact match. The last four digits of the media value display in the **Media Types** section of the **General Info** tab.

**EXAMPLE**: ****1234

- **Last name**: Enter all or part of the last name and select a search method from the drop-down list.
- **First name**: Enter all or part of the first name and select a search method from the drop-down list.
- **Patron Info**: Select the appropriate patron information from the drop-down list, enter the appropriate information in the field provided, and select a search method from the drop-down list.
- **Credential Info**: Select an option from the drop-down list to perform a patron search on a credential property, such as KEYVALUE or LCC.
- **Flags**: Select the appropriate flag from the drop-down list, enter the appropriate information in the field provided, and select a search method from the drop-down list.
- **Meal Plan**: Select the appropriate meal plan from the drop-down list.
- **SV&C Plan**: Select the appropriate SV&C plan from the drop-down list, and then select an option from the drop-down list to the right of the **SV&C Plan** field:
  - **Patron Has Plan**: Search for patrons who have the SV&C plan you selected in the **SV&C Plan** field.
  - **Balance Greater Than**: Search for patrons whose balance for the selected SV&C plan is greater than the amount you specified in the field provided.
  - **Balance Less Than**: Search for patrons whose balance for the selected SV&C plan is less than the amount you specified in the field provided.
  - **Patron Group**: Select **In** or **Not In** from the drop-down list and select the appropriate patron group from the drop-down list.

4. Click **Search** and select a patron from the resulting list of patrons.

**Note**: Depending on individual permissions, you may not be able to see or edit some of the fields/tabs in the Patron Lookup window.
### 3.1 Add/Edit/Remove Patron Groups

Use the following procedure to add, edit, or remove patron groups:

1. In the **Patron Lookup** option, select the **General Info** tab, and click the **Edit** button in the **Patron Groups** section of the tab. Editable fields are displayed.

   ![Patron Groups Table]

   **Table: Patron Groups**
   - **Group**
     - CIS Staff-All CIS Doors
     - CLE 402 - IT Access
     - CSGold Admin Group
     - IT HelpDesk 24-Hr Access
     - IT Server Administration
     - Staff Group
   - **Member Type**
     - TRIGGER
   - **Effective**
   - **Expires**

2. To add a patron group, select a group from the drop-down list to the right of the **New** button, enter the appropriate data in the fields provided in the bottom row, and click **New**.

   *The selected group has already been assigned.*

3. To edit a patron group, change the information in the appropriate fields.

4. To remove a group, click the X next to a group name. A line will be displayed through the group name to indicate that it will be removed.

   **Note:** Click **Cancel** to exit Edit mode without saving your changes.

5. Click **Save** to save your changes.

### 3.2 Meal Plan

Click the **Meal Plan** tab to maintain meal plan information for the selected patron.

**Note:** If there are multiple meal plans listed, select a specific plan to display the information for that plan.

![Meal Plan Interface]

From the **Meal Plan** tab you can add, drop, or edit a meal plan, add and remove meals from a plan, and view the PatronLog.
When you click View PatronLog on the Meal Plan tab, PatronTrans.rpt is selected in Ad Hoc Reports. The default report is configurable with the same user configuration parameter used to configure the Patron Lookup GUI (PatronGUI_PatronLog_Meal).

3.2.1 Add a Meal Plan

Use the following procedure to add a meal plan:

1. On the Meal Plan tab, click the Add button. Editable fields are displayed.

   ![Add Meal Plan Interface]

2. Complete the following fields:
   - **New Meal Plan**: Select the appropriate meal plan from the drop-down list. If the system is unable to retrieve the plan amount, *ERROR* will be displayed in the Plan Cost field.
   - **Start Date**: Enter the start date of the meal plan.
   - **End Date**: Enter the end date of the meal plan.
   - **Plan Cost**: If there is a plan cost associated with the meal plan, the amount will be displayed in this read-only field.

3. Click Next Term to automatically set the start and end dates for the next term based on the current start and end dates.

4. Click Refresh Cost to calculate the value in the Plan Cost field, which is based on the date range specified. The meal plan cost is often based on the number of days or weeks the plan will be used.

   **Note**: Click Cancel to exit the Add Meal Plan page without adding a meal plan.

5. Click Add Plan. The plan is added to the list of meal plans for the patron.
3.2.2 Edit a Meal Plan

Use the following procedure to edit a meal plan:

1. On the **Meal Plan** tab, select the plan you want to edit, and click the **Edit** button. Editable fields are displayed.

2. Edit the meal plan information as necessary.

**Note:** Click **Cancel** to exit edit mode without saving your changes. Click **Revert** to revert your current changes to the last saved values.

3. Click **Save** to save your changes.
3.2.3 Drop a Meal Plan
Use the following procedure to drop (remove) a meal plan:

**Note:** If the system is unable to retrieve the plan amount, *ERROR* will be displayed in the **Plan Refund** field.

1. On the **Meal Plan** tab, select the plan you want to drop, and click the **Drop** button. The **Drop Meal Plan** fields are displayed.

![Drop Meal Plan Image](image)

The plan refund amount will be displayed in the **Plan Refund** field, if applicable.

**Note:** Click **Cancel** to exit delete mode without deleting the meal plan.

2. Click **Drop Plan**. The meal plan is removed from the **Meal Plan** tab.

3.3 Stored Value/Credit
Click the **Stored Value/Credit** tab to maintain SV&C information for the selected patron. You can add, edit, and drop (delete) SV&C plans. You can also manually enter SV&C transactions by clicking the **Transaction** button in the **Balance** section of the tab.

![Stored Value/Credit Image](image)

When you click **View PatronLog** on the **Stored Value/Credit** tab, **SVCTransByPatron.rpt** is selected in Ad Hoc Reports. The default report is configurable with the same user configuration parameter used to configure Patron Lookup (**PatronGUIPatronLog_SVC**).
If there are multiple SV&C plans listed, select a specific plan to display the information for that plan.

You can use the Advanced Search feature to check SV&C balances.

Select a plan from the Advanced Search SV&C Plan drop-down list and then select one of the following options:

- **Patron Has Plan**: Search for patrons who have the plan currently selected in the SV&C Plan field.
- **Balance Greater Than**: Search for patrons whose balance for the currently selected plan is greater than the amount you specified in the field provided.
- **Balance Less Than**: Search for patrons whose balance for the currently selected plan is less than the amount you specified in the field provided.

### 3.3.1 Add an SV&C Plan

Use the following procedure to add an SV&C plan:

1. On the Stored Value/Credit tab, click the **Add** button. Editable fields are displayed.

2. Complete the following fields:
   - **SV&C Plan**: Select the appropriate SV&C plan from the drop-down list.
   - **Start Date**: Enter the start date of the SV&C plan.
   - **End Date**: Enter the end date of the SV&C plan.
   - **Initial Balance**: Enter the initial balance of the SV&C plan.

3. Click **Add Plan**. The plan is added to the list of SV&C plans for the patron.
3.3.2 Edit an SV&C Plan

Use the following procedure to edit an SV&C plan:

1. On the Stored Value/Credit tab, select the plan you want to edit, and click the Edit button. Editable fields are displayed.

2. Edit the SV&C plan information as necessary.
   
   **Note:** Click Cancel to exit edit mode without saving your changes. Click Revert to revert your current changes to the last saved values.

3. Click Save to save your changes.

3.3.3 Drop an SV&C Plan

Use the following procedure to drop (remove) a meal plan:

1. On the Stored Value/Credit tab, select the plan you want to remove, and click the Drop button. The Drop SV&C Plan fields are displayed.

2. The plan refund amount will be displayed in the Plan Refund field, if applicable.
   
   **Note:** Click Cancel to exit delete mode without deleting the SV&C plan.

   2. Click Drop Plan. The SV&C plan is removed from the Stored Value/Credit Plan tab.
3.3.4 Enter SV&C Transactions

Use the following procedure to manually enter SV&C transactions:

1. On the Stored Value/Credit tab, click the Transaction button in the Balance section. SV&C Transaction fields are displayed.

2. Complete the following fields:
   - **SV&C Plan**: Select the plan for which you want to enter a transaction.
   - **Location**: This field defaults to the location associated with the SV&C plan. You can enter all or part of a location in the drop-down field and click Search to select a different location.
   - **Tran Type**: Select the appropriate transaction type for this transaction.
   - **Amount**: Enter the transaction amount.
   - **Force**: Select this check box to force the transaction to succeed, even if there are insufficient funds or something else that would cause the transaction to be denied.
   - **Transaction Date**: This field defaults to the current date with the Today check box selected. To specify a different date, clear the Today check box and enter a date.
   - **Division Designator**: This field applies to MICROS® transactions. CS Gold will log the division designator specified.
   - **Code**: Codes are available based on the location you selected. The code will modify the transaction behavior as configured in Code Mapping.
   - **Comment**: Enter a comment regarding the transaction.

3. Click Submit. The transaction will be submitted and processed.
3.4 Access

Click the Access tab to display access assignments for the selected patron.

<table>
<thead>
<tr>
<th>Modify Access Assignments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
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<tr>
<td>-----------------</td>
</tr>
<tr>
<td>ATRC EXECUTIVE GROUP</td>
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<td>ATRC EXECUTIVE GROUP</td>
</tr>
</tbody>
</table>

To modify access assignments, click the Modify Access Assignments link. The access assignments page is displayed. Refer to section 6.4 (Access Assignments) for details.

When you click View PatronLog on the Access tab, PatronTrans.rpt is selected in Ad Hoc Reports. The default report is configurable with the same user configuration parameters used to configure the Patron Lookup GUI (PatronGUIPatronLog_Access).

A patron group membership effective/expire date range will be displayed when you select a patron with group membership that has an effective and/or expiration date. Access assignments from patron group memberships that are not yet effective or have expired appear as inactive access assignments with a strikethrough.
4 Access Assignments
You can configure access assignments for a patron or patron group and set up door lock/unlock schedules. CBORD recommends that you configure a renew period on special access cards to reduce the risk of someone accessing a secure location if the card is lost or stolen.

4.1 Configure Access Assignments
Use the following procedure to configure access assignments:
1. From the Admin Web menu, click Access Assignments. The access assignments page is displayed.

![Access Assignments Page](image)

2. Select an option:
   1. If you are assigning access to an individual patron, click the Patron tab and perform a patron search. Refer to section 6.2 for patron lookup details.
   2. If you are assigning access to a patron group, click the Patron Group tab and select a patron group from the drop-down list.
   3. If you are assigning a door lock/unlock schedule, click the Door Schedules tab.

![Patron Tab](image)

![Patron Group Tab](image)

![Door Schedules Tab](image)

3. Enter all or part of the location or location group for which you want to assign access or door schedules

![Location Search](image)

If you enter part of a location or location group and there are several matches, the first occurrence of the match is highlighted in the list of locations. For example, if you enter Tower in the Location field and click Find, and a Tower 1 and Tower 2 exist, the first occurrence of Tower will be highlighted.
Note: Click the Hide Unassigned Locations check box to show only assigned locations in the list.

4. Click **Find**. The location is highlighted in the list.

Note: Assignments are sorted by effective date to allow for quick administration of groups/patrons with many assignments.

5. Click the location (or location group) for which you want to assign access. The location details are displayed.
When entering access assignment information:

- Use the **Copy** and **Paste** buttons to duplicate access assignments. Refer to section 6.4.2 for more information.
- Click **Save** to save an assignment.
- Click **Delete** to delete the current assignment.
- Click **Revert** to restore the previous assignment settings.
- Click **Cancel** to exit the location details page without saving changes.

6. Complete the fields in the **Schedule/Calendar** section.

<table>
<thead>
<tr>
<th>Schedule/Calendar</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image-url" alt="Image of Schedule/Calendar section" /></td>
</tr>
</tbody>
</table>

- **Normal Schedule**: Select the schedule from the drop-down list that reflects the days and times that the patron can commonly access the location.
- **Holiday Schedule**: Select the schedule from the drop-down list that reflects the days and times that the patron can access the location during a designated calendar holiday.
- **Calendar**: Select the calendar from the drop-down list that reflects the periods designated as holidays throughout the schedule.
  - Click **Show** next to the **Normal Schedule**, **Holiday Schedule**, or **Calendar** field to display the selected schedule or calendar.
  
  ![Image of Normal Schedule](image-url)
  
  - Click **Edit** next to the **Normal Schedule**, **Holiday Schedule**, or **Calendar** field to edit the selected schedule or calendar.

![Image of Schedule Name](image-url)
Click **Add** next to the **Normal Schedule**, **Holiday Schedule**, or **Calendar** field to add a schedule or calendar.

7. Complete the fields in the **Assignment Options** section.

   - **Active**: Select this check box to activate the assignment.
   - **Override**: Select this check box to enforce a single schedule for this patron/location pair, overriding all others.
   - **Unlock Priv**: Select this check box to enable the double-swap feature to unlock the entry point.
   - **Strike Time**: Enter the interval in seconds that an entry point will remain unlocked after being unlocked by a patron.
   - **Effective**: Click the **Calendar** icon, and select the date and time access will become effective.
   - **Expire**: Click the **Calendar** icon, and select the date and time access will expire.

8. Complete the fields in the **Special Options** section.
**Note:** Not all devices support all of the features in the **Special Options** section. Refer to the appropriate device documentation to verify whether a feature is supported.

- **Emergency Use:** Select this check box if the patron has 24/7 access to the location, regardless of the door schedule, access assignment schedule, and Lockout status. During an emergency lock down, only people with Emergency Use access can open the door. It is useful to have a card that emergency personnel can use during an emergency.

- **PIN:** This value is considered only if the location has been configured with **2 - Inherit from Access Assignment** as the value for the **RDR_REQUIRE_PIN** parameter in the Location Configuration GUI.
  - **No PIN Required:** The patron is not required to enter a PIN at this location.
  - **PIN Required:** The patron is required to enter a PIN at this location. If the patron does not have a PIN, the patron will not be able to enter this location.
  - **PIN Conditional:** The patron is required to enter a PIN at this location if the patron has a PIN. If the patron does not have a PIN, a PIN is not required. This option is the default.

- **Alarm Point Group:** Select an alarm point group from the drop-down list to enable the <A + Swipe> and <Hold + Swipe> features to arm and disarm points from the reader governing this location. Patrons will press the A button and swipe their card to arm points from the reader, and press the Hold button and swipe their card to disarm points from the reader. For more information, refer to the *CS Access™ Control Guide* (TP-820305-001).

- **Two Man Rule:** A **Two Man Rule** card will open a door if a second, distinct **Two Man Rule** card is also swipe within five seconds. A **Two Man Rule** card by itself or in concert with a regular (not a **Two Man Rule** card) will not open the door.

- **One Use:** Select this check box if the patron can only access the location one time.

- **Lockout:** Lockout cards also carry Lockout Disable privileges. Selecting this check box grants both access privileges. Swipe a lockout card once to cause the door to enter a locked state. The door will stay locked, regardless of its internal schedule. Only Emergency Use privilege cards can enter during lockout. Other cards cannot enter, even if the patron has access under ordinary situations. When the situation is resolved, swipe the Lockout card a second time to return the doors to their normal status.

- **Privacy Override:** This option is used for locksets that support deadbolts or privacy override.

- **Lockout Disable:** This option is reserved for future use.

- **Disallow Hand Entry:** Select this check box if the patron will not be allowed to use a hand entry number to access the location. If this check box is selected, the patron can access the location only by swiping a card, even if the **HANDENTRY** media type is defined. If the **Disallow Hand Entry** check box is not selected, the location can be accessed by entering the hand entry number or by swiping a card; either method will work if the patron has both media types defined.

  **Note:** You cannot select both **Disallow Hand Entry** and **Disallow Card**.

- **Disallow Card:** Select this check box if the patron will not be allowed to swipe a card to access the location. If this check box is selected, the patron can access the location only by entering a hand entry number, even if the **CARD** media type is defined. If the **Disallow Card** check box is not selected, the location can be accessed by entering the hand entry number or by swiping a card; either method will work if the patron has both media types defined.

- **Deny and Alarm:** This option is reserved for future use.
• **Security Level:** By default, the security level is based on the location. If you need to set a specific security level for the access assignment, select a security level from the drop-down list.

• **Renew Period:** Select the number of days the card will carry out the action of the access assignment from the drop-down list. If the card is not re-encoded during the renew period, it can be re-encoded later without changing the access assignment. For example, if an electrician was assigned access to Building A for two days and he tries to enter Building A on day three, access will be denied. The administrator can re-encode the card if additional access has been approved.

• **Required Elevation Level:** Select the elevation level that determines which elevated level must be activated for the assignment to become effective. Currently, **Elevated** is the indicator that restricts the option to use when the patron’s masterkey is activated. This option supports the masterkey access privilege elevation feature.

9. Click **Save.** The patron access assignment is saved. Refer to the following three screen samples for examples of access assignments.

**Sample Patron Group Access Assignment**

![Sample Patron Group Access Assignment](image)

**Sample Door Schedule Access Assignment**

![Sample Door Schedule Access Assignment](image)

A patron group membership effective/expire date range will be displayed when you select a patron with group membership that has an effective and/or expiration date. Access
assignments from patron group memberships that are not yet effective or have expired appear as inactive access assignments with a strikethrough.

4.2 Duplicate an Access Assignment

Use the **Copy** and **Paste** buttons that appear on the access assignment details page to duplicate an access assignment. (The **Copy/Paste** feature does not use the OS Clipboard.)

Use the following procedure to duplicate an access assignment:

1. In Access Assignments, locate the location/group assignment you want to copy from and display the assignment details page.

2. Click **Copy** (circled in blue) to store the assignment properties into memory.

3. Locate an existing location/group access assignment (or create a new one) to paste into and display the assignment details.

4. Click **Paste** and make any additional changes, as necessary.

5. Click **Save**.
5 **Patron Access Exception**

The **Patron Access Exception** option allows users to provide patrons with quick access to a location.

1. From the Admin Web menu, select **Patron Access Exception**. The **Patron Access Exception** screen is displayed.

2. Complete the following fields, as appropriate:

   - **Locations**: Select a location from the drop-down list. The location you select will be displayed in the **Selected Locations** area on the page.
   - **Location Groups**: Select a location group from the drop-down list. The location group you select will be displayed in the **Selected Locations** area on the page.
   - **PIK**: Enter a PIK to locate a patron by PIK.
   - **Last**: Enter a last name to locate a patron by last name.
   - **Advanced**: Click **Advanced** to perform an advanced search for a patron.
   - **Select from Patron Groups**: When you click this button, the **PIK**, **Last**, and **First** fields, and the **Advanced** and **OK** buttons are replaced with a **Patron Group** drop-down field and a **Select from Patrons** button. Select a patron group from the drop-down list. Click **Select from Patrons** to redisplay the **PIK**, **Last**, and **First** fields.
   - **Access**: Select **Allow** or **Deny** from the drop-down list.
   - **Begin**: Specify the time and date the access should begin.
   - **End**: Specify the time and date the access should end.

3. Click **Submit** to submit the patron access exception. A message similar to the following will be displayed:

   ```
   Patron Group (123456) schedule update was Successful for Location Group 502 Successful for Location 8608
   ```
6 Open/Close Exception

The Open/Close Exception option simplifies the process of opening and closing early.

1. From the Admin Web menu, select Open/Close Exception. The Open/Close Exception page is displayed.

2. Complete the following fields, as appropriate:
   - Select a location from the Locations drop-down list. The location you select will be displayed in the Selected Locations area on the page.
   - Select a location group from the Location Groups drop-down list. The location group you select will be displayed in the Selected Locations area on the page.

   **Note:** Click the X next to a location or location group to deselect the item. Click Clear All to clear all selections.

   - Select the appropriate option from the drop-down list in the lower portion of the page:
     - Open Early At
     - Open Late At
     - Open At
     - Close Early At
     - Close Late At
     - Close At

     - Specify the time to open or close the location.
     - Specify the date to open or close the location early or late in the On field.

3. Click Submit to submit the open/close exception.

7 Remove Exceptions

Access exceptions at a selected location or location group can be displayed on the Remove Exceptions page. Use the Remove Exceptions option to remove exceptions set up in Patron Access Exceptions and Open/Close Exceptions. The displayed exceptions include those exceptions applied to parent location groups. Click the Remove icon (X) next to an exception to remove the exception from the system. Click Refresh to refresh the information on the page.
8 Patron Group Management

8.1 Creating a New Patron Group
In Patron groups click on Create a New Group and enter the group name for the group and click save group. (All areas/buttons circled below in Blue.)

8.2 Manage Patron Group Members
1. To add a user to a patron group, select the patron group from the list in the top portion of the window.
2. Search for the patron with PIK (BannerID)/Last/First name as search criteria. If you expect more than one patron to be returned by the search, be sure the box labeled **Add search results to group if they are not already members** is NOT checked. If more than one patron is returned by the search, be sure only the individuals that are to be added have the check box marked. Be sure to select **Save Group** to save the changes.

3. To delete a patron from the group, select the group and search for the patron using any criteria like above, or just scroll through the list in the bottom portion of the window and uncheck the check box next to the patron.

4. Click **Remove Selected from Group** and **Save Group**.

### 8.3 Managing Group Access Assignments

1. Determine needed location access for the existing patron groups.
2. In Patron groups, after selecting the group to be edited select blue color link **Group access assignment**, circled in the above image (Section 8.2).
3. This link directs to different page where you may review and modify patron group access.

   **Notes:**
   a. Blue key symbol indicates the group has assignments to specific locations within that location group. Expand the group to see those specific assignments.
   b. Yellow key symbol shows the assigned schedule to that specific location or location group. If a yellow key is displayed at the location group level (as below), the assignment automatically is used for ALL locations within that location group.
   c. Assignments at the location level always override assignments at the group level.
   d. No key symbol means the patron group does NOT have access to the location – unless they were granted access at the group level.

4. To **Add** an access assignment, click on the location or location group. Complete the resulting form and select **Save**.
5. To **Modify** an access assignment, click on the assignment. Update the form as needed and select **Save**.
6. To **Delete** an access assignment, click on the assignment. Select the **Delete** button, then responding in the affirmative to and verification windows.
8.4 Managing Access Schedules

1. To select from an existing schedule, select the drop down for the Normal Schedule in the Schedule Center section of the location group access window. Scroll through the list until you find the desired schedule, select it.

2. To add a new schedule, click the Add button next to the Normal Schedule dropdown.

3. Provide the desired Schedule Name (note the schedule # will automatically be assigned on save).
   i. To allow access, click on the day/s of the week for which access is to be granted.
      1. Specify the start time (24hr) access is to be allowed, for the day, in the Begin box.
      2. Specify the end time (24hr) access is to be ended, for the day, in the End box.
   ii. On a new line (click the “+” symbol at the end of the line) to add difference times for a day schedule.
   iii. To block access for a day of the week (for instance Saturday/Sunday), on a new line (see ii.)
       1. Click on the day/s to have no access.
       2. Specify the End time to be either 23:59:59 or 00:00:01 (11:59PM or 12:00AM). This is the time the lock will be refreshed.
       3. Do not specify a Begin time.

4. Information Technology System Administrators are the only individual who may delete a specific schedule. If you have a schedule that needs to be deleted do the following:
   i. Verify you have removed all assignments using the schedule
ii. Email helpdesk@Okstate.edu and identify the schedule name and number and request the CSGold schedule be deleted.

9 Web Reporting

Use the following procedure to use the Web Reporting module:

**Note:** Files that have been downloaded are no longer displayed, unless **Show All** has been selected.

1. From the Admin Web menu, click **Stored Reports.** The **My Reports** page is displayed.

2. You can do the following from the **My Reports** page:
   - **Show Group:** Select this check box to display the IUG that owns each report.
   - **Show Parameter Set:** Select this check box to display the parameter set used to create each report.
   - **Arrange by:** Select to arrange reports by **Report, Date,** or **Parameter Set.**
   - **Apply:** Click **Apply** to apply your changes.
   - **Show All:** Select this check box at the bottom of the page to reveal all available report files, regardless of whether or not you have already downloaded (or hidden) the files.
   - **Hide Selected Files:** Select the viewed reports that you want to hide and then click **Hide Selected Files** at the bottom of the page.
   - **Refresh:** Click **Refresh** to refresh the information on the page after you have made changes.

3. Click the **Folder** icon in the **Files** column for the report you want to display. The report PDF file and date are displayed.

4. Click the **PDF** icon to display and, optionally, print the report.

10 Ad Hoc Reports

The Ad Hoc Reports module emulates CS Gold Report Manager without installing the CS Gold GUI. To use this module, you must first configure the folder structure in CS Gold. Refer to the **CS Gold® Administration Guide Book 7 - Reports** (TP-830242-001) for details.

**Note:** For Ad Hoc reports to work with version 4.2.0 or later, **rptNightly.exe** and **ReportHandler.exe** version 6.0.13 or later is required on the TPS. These executables are provided in the Bin folder of the version 4.2.0 AdminWeb files.

The folder structure is the same structure used in CS Gold Report Manager.
EXAMPLE:

- Cabinet
- Folder
  - File

You can do the following:

- Select a report.
- Determine how long a report is kept.
- Select the format of the report.

Use the following procedure to use Ad Hoc reports:

1. From the Admin Web menu, click **Ad Hoc Reports**. The list of available reports is displayed for the user group or IUG.

**Note:** Click the arrow to expand or hide the reports.

2. Select a report. A pencil appears on the report file icon and a set of controls is displayed in the right pane.

```plaintext
Select Location Group Hierarchy: (-1) Default Hierarchy

Select A Report

Access Reports
Activity Reports
Alarm Reports
Config Reports
Meal Plan Reports
Notification Reports
Patron Info
SV&C Reports
Time & Attendance
Transaction Reports
X & Z Reports
```
3. Complete the following fields:
   - **Select Location Group Hierarchy**: Select the appropriate group from the drop-down list. Changing the hierarchy option will reload the report prompts using the newly selected hierarchy.
   - **Days to Keep**: Enter the number of days that you want the record to be available before it is deleted.
   - **Share**: If you need to make this report available to others, click Share. The Share tab is displayed. The Share tab is only available in the Ad Hoc Reports option.
   - **Format**: Select the output for your reports from the drop-down list (Excel, HTML, Microsoft Word, PDF, Plain Text, or CSV).
   - **Notify via E-Mail**: Select this check box if you want to receive the report through e-mail. Enter an e-mail address in the field provided.
     - **Send the link**: Select this option if you want to be sent a link to the report in an e-mail.
     - **Send the attachment**: Select this option if you want the report sent in an e-mail as an attachment.
   - **Tabs**: The tabs that are displayed depend on the report you selected. Use the available tabs to set restrictions on data covered by the current report using ranges, sorts, and other controls that are displayed on the tabs. The tabs correspond to the tabs in the CS Gold Report Manager GUI.

4. Click **Submit** to submit your request. The following message is displayed:
   Your Report Has Been Submitted.
   Would you like to wait for the results?

   **Note**: Click **Cancel** to cancel a request. Click **Reset** to revert the settings to the most recently saved (submitted) selections.

5. To view the report now, click **Yes** and then click **Save File**. To view the report later, click **No**. The report is sent to your e-mail address.
11 Reader Status

Use the Reader Status option to view status information about the devices assigned through CS Gold TPS Configuration.

![Reader Status Table](image)

**Note:** Click the Refresh icon to the right of the date and time to refresh the reader status information on the page.

The following options and information are provided on the Reader Status page:

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Totals</td>
<td>The Totals section at the top of the page shows the total for each status type (Online, Trouble, Offline, and Other) along with a total of all statuses. Click the down arrow in this section to hide the Totals information. Click the right arrow to display the Totals information.</td>
</tr>
<tr>
<td>Restrict Locations by Interactive User Group</td>
<td>If this check box is selected (checked), locations will be filtered and only those locations allowed by Location Admin will be visible (Location Admin is configured per IUG on the Access Location/Group Admin tab in the CS Gold Location Group Mapping GUI). If the check box is cleared (unchecked), all locations will be visible. If the current user group has RESTRICTLOCVIEW enabled in User Manager, the visible locations will be restricted and the Restrict Locations by Interactive User Group check box will be disabled.</td>
</tr>
<tr>
<td>Filter</td>
<td>Use the Filter option to filter the reader information that is displayed on the page (refer to Set a Filter for more information).</td>
</tr>
<tr>
<td>Status</td>
<td>Indicates the current status of the reader.</td>
</tr>
<tr>
<td>Location</td>
<td>Indicates the unique location number that identifies each reader.</td>
</tr>
<tr>
<td>Name</td>
<td>Indicates the name of each reader.</td>
</tr>
<tr>
<td>Time</td>
<td>Provides the time and date of the most recent change in the reader status.</td>
</tr>
</tbody>
</table>
Click the icon in a **Time** column cell to display the reader status history of a location, if available.

<table>
<thead>
<tr>
<th>Address</th>
<th>Indicates the reader IP address.</th>
</tr>
</thead>
<tbody>
<tr>
<td>MGR</td>
<td>Indicates the associated MGR for the reader.</td>
</tr>
</tbody>
</table>

**Version**

Specifies the reader firmware version. Click the icon in a **Version** column cell to display the firmware version history of a location. As of version 4.3.0, Squadron Access Control version numbers are shown on DHCP controllers.

Set a Filter

Use the following procedure to filter the information that is displayed on the **Reader Status** page:

1. The following conditions can be set using the options available in the drop-down lists in the **Filter** section of the page:

   **Table 10-2: Filter Conditions**

<table>
<thead>
<tr>
<th>With this option...</th>
<th>...you can use these settings:</th>
</tr>
</thead>
</table>
| Location Number     | • Is Between  
                      | • =  
                      | • >=  
                      | • <=  
                      | Select the **Not** check box to indicate *not any of the above* (for example, not equal to). |
| Location Name       | • =  
                      | • Contains  
                      | • Starts With  
                      | • Ends With  
                      | Select the **Not** check box to indicate, for example, *does not contain*. |
| Location Group      | Specify whether one or more of the location groups selected is in the list. Select the **Not** check box to indicate that it is not any of the location groups selected. If you attempt to create more than one location group filter, the following message will be displayed in the **Active Filters** area: (Last Filter input was invalid: Cannot have two different group filters) |
| Term Type           | Specify whether one or more of the terminal types selected is in the list. Select the **Not** check box to indicate that it is not any of the terminal types selected. If you attempt to create more than one term type filter, the following message will be displayed in the **Active Filters** area: (Last Filter input was invalid: Cannot have two different Term Type filters) |
| MGR                 | Specify whether one or more of the MGRs selected is in the list. Select the **Not** check box to indicate that it is not any of the MGRs selected. If you attempt to create more than one MGR filter, the following message will be displayed in the **Active Filters** area: (Last Filter input was invalid: Cannot have two different MGR filters) |

2. After you have selected the filter criteria, click **Filter**. The results matching your criteria are displayed.

**Note:** To remove a filter, click the **X** icon next to the filter in the **Active Filters** area of the page. To clear all filters, click **Clear All**. Reader statuses for all readers will be displayed.
Door Viewer consists of a location browser that shows doors and child groups within a selected location group. This feature requires CS Gold version 6 or later.

Using the onscreen controls, the user can navigate to any visible location group, based on the IUG and location group hierarchy for the current user.

A persistent display of the current number of unlocked doors within the scope of the locations visible to the user appears in the top-right corner of the Door Viewer page. (This feature requires CS Gold version 6.0.17 or later.)

Door state information is displayed using icons representing Online, Offline, Locked, Unlocked, Open, Closed, and Emergency Mode. The number of online/total door locations within child groups is also provided, for example, Brooks Building (25).

Note: Emergency Mode commands are available only to those users with the Allow_EmergencyMode permission enabled in CS Gold User Manager.

Sending Locked, Unlocked, and Emergency Mode commands to location groups is supported. A warning message will appear when a user is about to send a command to a location group; for example, Are you sure you want to set emergency mode on 456 doors? This will give the user a chance to avoid accidentally sending the wrong command to groups of doors.
Sending multiple door commands is also supported. A progress display in the top left corner of the page shows the number of door commands remaining to be sent (for example, **14 in progress**).

### 12.1 Door Viewer Features

The following features are available in **Door Viewer**:  

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Back/Forward" /></td>
<td><strong>Back/Forward</strong>: Navigates to previously selected location groups in the navigation history.</td>
</tr>
<tr>
<td><img src="image" alt="Parent Group" /></td>
<td><strong>Parent Group</strong>: Navigates to the parent location group that contains the currently selected group.</td>
</tr>
<tr>
<td><img src="image" alt="Home" /></td>
<td><strong>Home</strong>: Navigates to the top level locations and groups.</td>
</tr>
<tr>
<td><img src="image" alt="Favorites" /></td>
<td><strong>Favorites</strong>: Shows the current set of locations and groups the user has chosen as favorites.</td>
</tr>
<tr>
<td><img src="image" alt="Refresh" /></td>
<td><strong>Refresh</strong>: Forces an update of the currently selected location group (in the event that information has become out of date).</td>
</tr>
<tr>
<td><img src="image" alt="Find" /></td>
<td><strong>Find</strong>: Performs a search for locations or groups. Type all or part of the location or group name in the field at the top of the page and click the Find icon. Matching items will be displayed in the drop-down list. Click the appropriate location or group. The location or group will be located and highlighted on the page.</td>
</tr>
</tbody>
</table>

The following options may be available when you click on a location:

- **Open**: Click this option to open the door. The message *Open command sent* is displayed.
- **Lock**: Click this option to lock the door. The message *Lock command sent* is displayed.
- **Unlock**: Click this option to unlock the door. The message *Unlock command sent* is displayed.
- **Set Emergency**: Click this option to set the door to Emergency Mode. The message *Emergency Mode Set* is displayed.
- **Clear Emergency**: Click this option to clear the door from Emergency Mode. The message *Emergency Mode Cleared* is displayed.
- **Recent Activity**: Click this option to display recent transactions at a given location. Refer to section 6.13.2 for more information about this feature.
- **Close**: Click the close icon (x) to close the option window.
- **Add Favorite**: Click the **Add Favorite** icon (star) to add the location as a favorite. When you click the **Favorites** icon at the top of the page, the location will be included in the display with any other favorite locations.
- **Expand**: Click this option to display the door locations within a group.
Door commands are disabled for read-only locations based on the Location Admin privilege settings for the current user.

12.2 Recent Activity

Click on a location on the Door Viewer page and click Recent Activity in the pop-up menu to display recent transactions at the location. This feature will display up to 40 transactions occurring in the past 60 days. The transactions are sorted by date with the most recent transaction at the top.

<table>
<thead>
<tr>
<th>Date</th>
<th>Name</th>
<th>Time</th>
<th>Location</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/10/2014</td>
<td>CHARLES METZGER</td>
<td>09:52:23</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Approved</td>
</tr>
<tr>
<td>04/09/2014</td>
<td>MICHAEL KERNKE</td>
<td>08:49:18</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Approved</td>
</tr>
<tr>
<td>04/08/2014</td>
<td>TINA MEIER</td>
<td>14:38:56</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Approved</td>
</tr>
<tr>
<td>04/08/2014</td>
<td>MICHAEL KERNKE</td>
<td>13:16:33</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Approved</td>
</tr>
<tr>
<td>04/08/2014</td>
<td>SHANNON HOWELL</td>
<td>09:46:59</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Approved</td>
</tr>
<tr>
<td>04/07/2014</td>
<td>RICHARD LINDHORST</td>
<td>13:13:12</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Approved</td>
</tr>
<tr>
<td>04/07/2014</td>
<td>RICHARD LINDHORST</td>
<td>08:32:50</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Approved</td>
</tr>
<tr>
<td>04/07/2014</td>
<td>RICHARD LINDHORST</td>
<td>08:17:03</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Approved</td>
</tr>
<tr>
<td>04/04/2014</td>
<td>SHANNON HOWELL</td>
<td>13:40:44</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Approved</td>
</tr>
<tr>
<td>04/04/2014</td>
<td>SHANNON HOWELL</td>
<td>12:21:46</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Approved</td>
</tr>
<tr>
<td>03/25/2014</td>
<td>STEPHEN JOHNSON</td>
<td>20:11:16</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Denied- No PatronDoor Records Found</td>
</tr>
<tr>
<td>03/14/2014</td>
<td>LORRAINE LEMASTER</td>
<td>09:53:42</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Approved</td>
</tr>
<tr>
<td>03/11/2014</td>
<td>SCOTT TAYLOR</td>
<td>12:33:37</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Approved</td>
</tr>
<tr>
<td>03/10/2014</td>
<td>RICHARD LINDHORST</td>
<td>13:04:08</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Approved</td>
</tr>
<tr>
<td>03/04/2014</td>
<td>SHANNON HOWELL</td>
<td>10:44:32</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Approved</td>
</tr>
<tr>
<td>02/27/2014</td>
<td>SCOTT TAYLOR</td>
<td>08:30:29</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Approved</td>
</tr>
<tr>
<td>02/24/2014</td>
<td>RICHARD LINDHORST</td>
<td>15:50:25</td>
<td>IT-CLB-402ConfRm-A</td>
<td>Approved</td>
</tr>
</tbody>
</table>

12.3 Manual Update Mode

In Manual Update mode, the Door Viewer page will not get door event updates in real time—the user will have to click the Refresh icon to view updated door states. The page will automatically switch to Manual Update mode when a part of the system (for example, the browser, network, or server database) becomes unresponsive. After 30 seconds of waiting for the locations to load or 60 seconds of no status updates, the system will notify the user once and attempt to reestablish the automatic status updates.

If the connection remains unresponsive, the Door Viewer page will switch to Manual Update mode and a Manual Update Mode message will be displayed at the top of the page. Manual navigation or update will cause an attempt to return automatic updates. After attempting to return to Automatic Update mode three times, the page will stay in Manual Update mode until the entire page is reloaded.

13 Log Out

Use the following procedure to log out of Admin Web:
1. On the Admin Web menu, click Logout.
2. At the Are you sure you want to log out? prompt, click Yes. You are logged out of Admin Web.