Genetec ClearID™ User Guide

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Legal notices

Document information

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You can send your comments, corrections, and suggestions about this guide to documentation@genetec.com.

About this guide

This guide is intended for Genetec ClearID™ users. This guide describes how to set up and use the Genetec ClearID™ system.

Notes and notices

The following notes and notices might appear in this guide:

- **Tip:** Suggests how to apply the information in a topic or step.
- **Note:** Explains a special case or expands on an important point.
- **Important:** Points out critical information concerning a topic or step.
- **Caution:** Indicates that an action or step can cause loss of data, security problems, or performance issues.
- **Warning:** Indicates that an action or step can result in physical harm, or cause damage to hardware.

IMPORTANT: Content in this guide that references information found on third-party websites was accurate at the time of publication, however, this information is subject to change without prior notice from Genetec Inc.

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Chapter 5: Managing identities and users

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About ClearID

Learn about the ClearID self-service physical access management solution.

This section includes the following topics:

What is ClearID?

Genetec ClearID™ is a smarter way to manage physical access using a self-service solution for Synergis™. Using ClearID, you can take control of access and compliance by using a rule-based approach through a web-based interface.

- You can access the system from any standard browser. All data and files that are imported to the system are automatically encrypted.
- The ClearID system is also integrated with Active Directory. This integration means that organizations can use their existing Active Directory service to authenticate users and manage system access.

Example

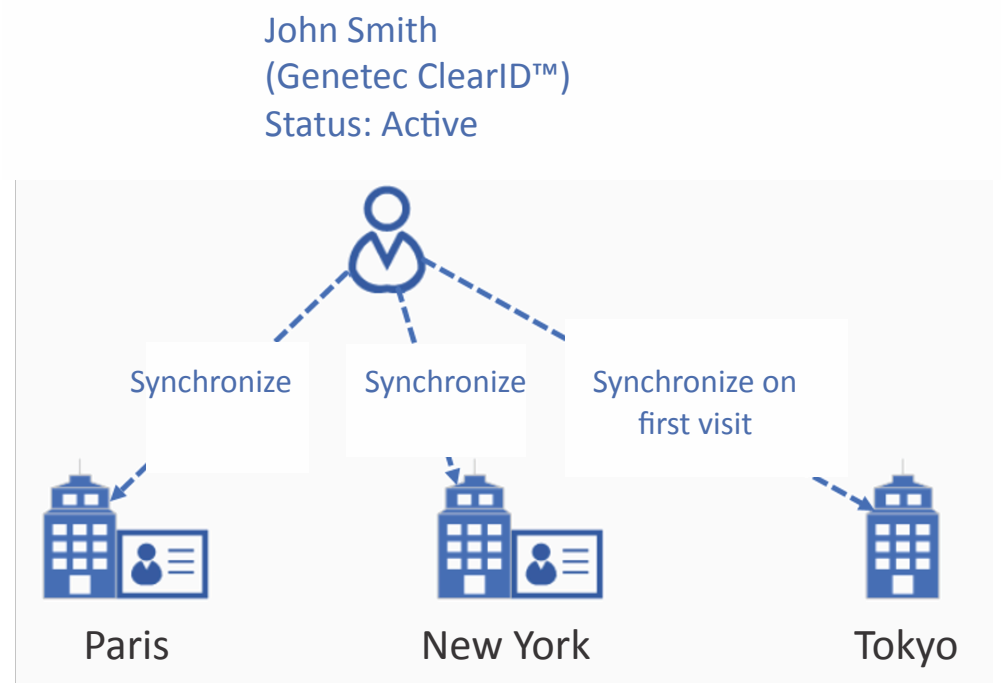
For a complete product description, visit the ClearID product page.

Advantages of the ClearID system

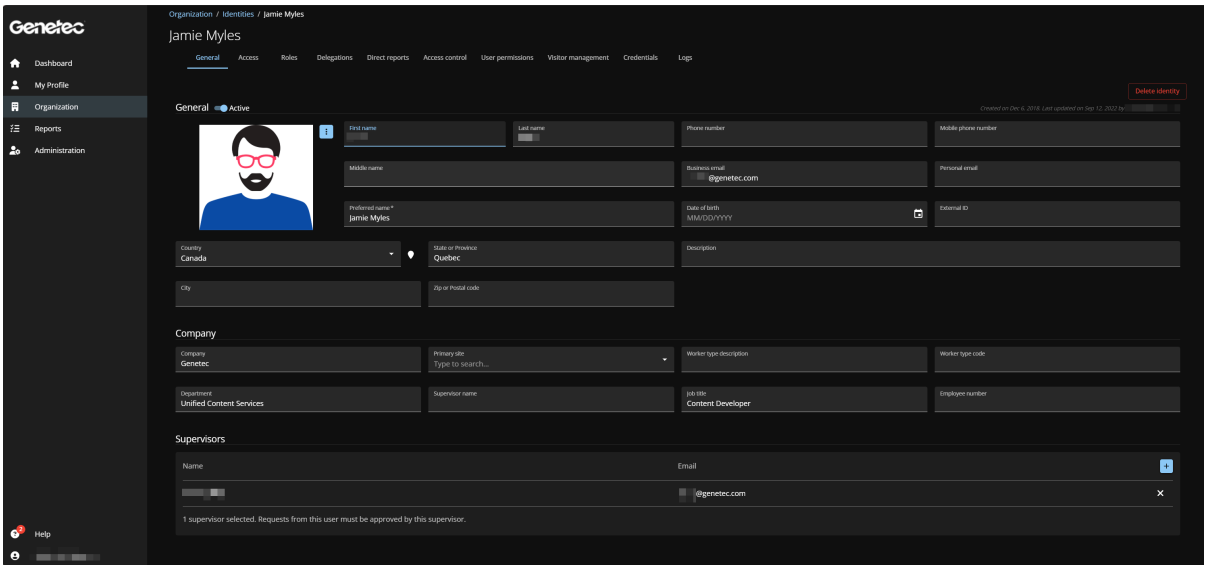
- Improve the flow of people by using the self-service solution to manage physical access.
- Reduce the risk of security breaches by simplifying access rights management.
- Standardize and automate security policies for onboarding, offboarding, access requests, and issuing credentials for multiple independent sites.
- Connect to and enhance your existing physical security system.
- Benefit from an off-the-shelf approach with faster deployment and fewer integrations to maintain.
- Maintain less infrastructure by using the distributed cloud-based approach.
- Increase efficiency and compliance with internal and external regulations, such as GDPR and export control screening.

One identity

ClearID uses one single identity to synchronize the access information for multiple independent sites managed using different instances of Synergis.



To minimize the personal information replicated in each local access control system, ClearID automatically creates the cardholder only when someone requests a site visit for the first time.



After access is granted to a new site, the system automatically synchronizes all the permanent credentials linked to the Identity. If the corporation shares the same card technology for different sites, the badge works without any manual interventions at the new site.

When an identity is deactivated in ClearID, the cardholder is deactivated. The identity is automatically synchronized to all cardholders linked to all the different areas in all sites. The credentials remain active in Security Center, but access is automatically denied because the cardholder is inactive.

Related Topics

ClearID videos on page 31
ClearID Technical Brochure (8 pages)
ClearID - Product page
ClearID - Portfolio page
Genetec Compliance Portal

About ClearID architecture

Genetec ClearID™ offers United States-only, European-only, Canadian-only, or Australian-only location options for data centers. Each option allows synchronization between local sites. The web application modules perform tasks or share data between the authoritative sources, ClearID, and the endpoints.

IMPORTANT: Transferring or copying a customer account from one instance to another isn't supported.

USA distributed architecture

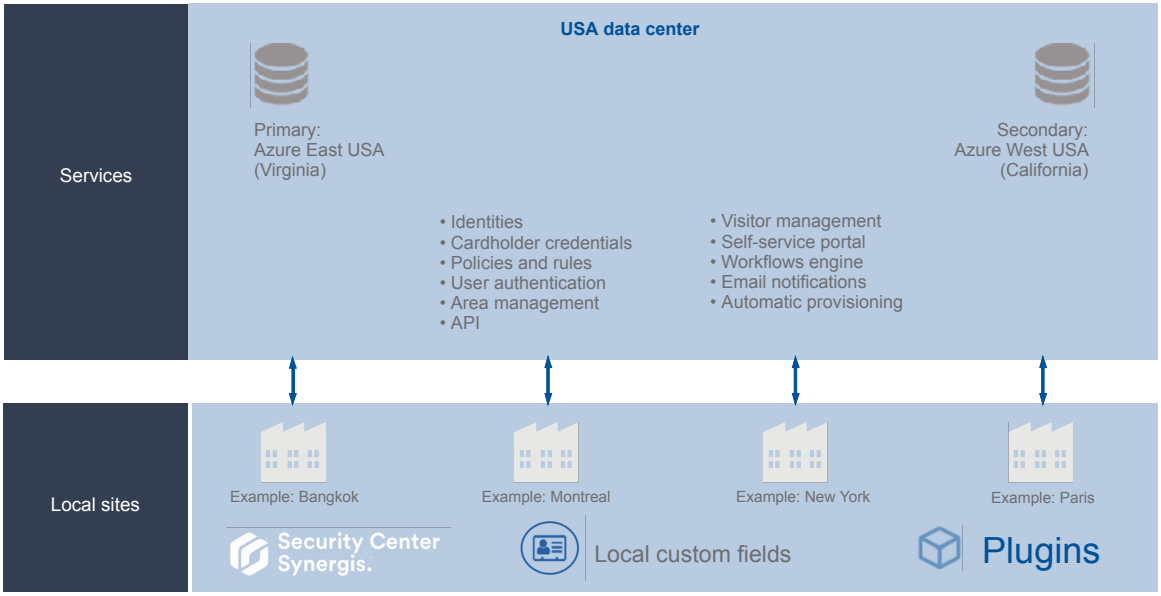
The following diagram illustrates the USA distributed solution. The diagram shows what data is stored, where data is stored, and how data flows between the local sites and the regional services.

NOTE: Regional services data is stored in the cloud.

ClearID takes advantage of the following:

- Multiple Azure data centers to minimize the risk of downtime.
- Encrypted employee data to minimize the risk of data theft.
- Geo-localized data to maintain less infrastructure and provide an optimized approach for data flow performance.

Genetec ClearID™ USA only architecture



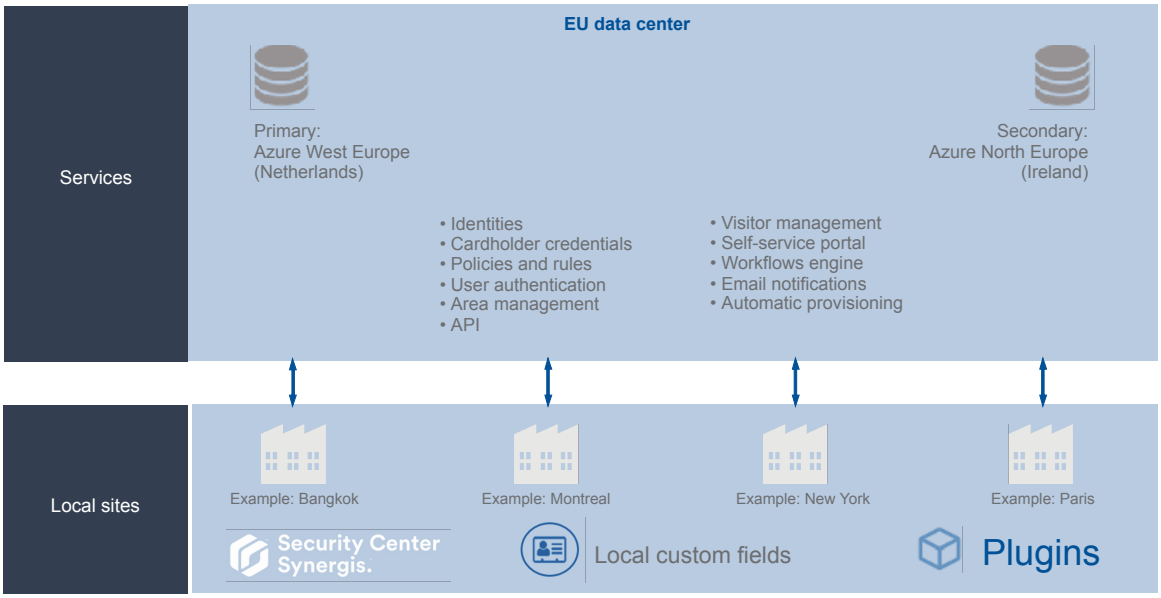
NOTE: [1]For more information about which data centers are used in the regional deployments, see the *Microsoft Corporation* entry in the ClearID section of the Genetec Subprocessors list.

For visitors, the relevant guest information is stored with the visit event information. This information is then transferred to the Security Center managing the site visited.

Europe only architecture

The following diagram illustrates the Europe-only solution where data is stored in European data centers. For example, when customers or company policies require data to be stored in European data centers.

Genetec ClearID™ Europe only architecture

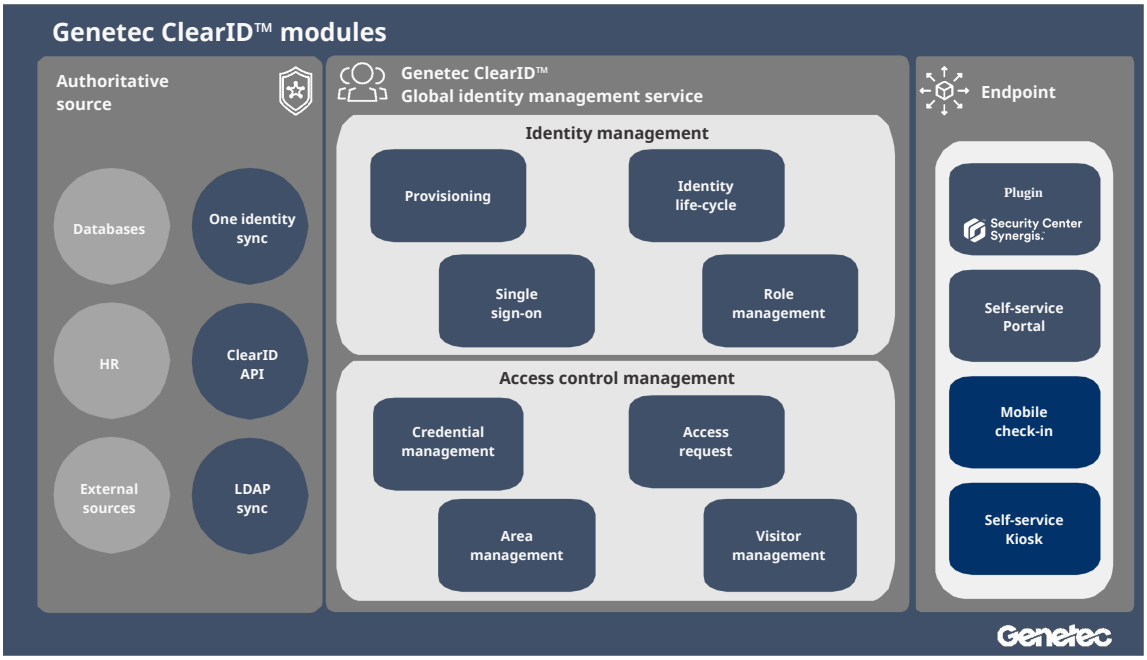


NOTE: You can also choose from Canada-only and Australia-only data storage solutions.

- **Canadian data centers:**
  - Primary data center: Azure Central Canada (Ontario)
  - Secondary data center: Azure East Canada (Quebec)
- **Australian data centers:**
  - Primary data center: Azure East Australia (New South Wales)
  - Secondary data center: Azure Central Australia (Canberra)

ClearID modules

The following diagram illustrates the ClearID web application modules that are available to customers:



- **Authoritative source:** Shows the identity provisioning options that are available to customers. You can create identities in ClearID from one of the data sources (Databases, HR, External sources) by using one of the tools (Genetec ClearID™ One Identity Synchronization Tool, Genetec ClearID™ API, or the Genetec ClearID™ LDAP Synchronization Agent).
- **Global identity management service:** Shows an overview of the features and services offered by the ClearID platform.
- **Endpoint:** Shows the modules that customers directly interact with. These modules are where the customer enters their data or configures their system.

Cloud architecture

ClearID is deployed on the Microsoft Azure cloud platform, to take advantage of its industry-recognized security. Microsoft Azure has been audited against SOC 1, SOC 2, and SOC 3 standards. Audits are conducted in accordance with ISO SSAE 16 and ISAE 3,402 standards. Certifications are regularly updated and can be provided upon request. Azure is also compliant with ISO 27001.

The service architecture is built for High availability (HA) and scalability. Data stored in ClearID is redundant, ensuring the redundancy of critical data and mitigating the impact of hardware failure. This architecture, coupled with the robustness of the underlying Microsoft Azure cloud, means that we can provide a 99.9% SLA.

Security controls

Microsoft Azure adheres to a rigorous set of security controls that govern operations and support. Microsoft deploys a combination of preventive, defensive, and reactive controls including the following mechanisms that help to protect against unauthorized developer or administrative activity:

- Strict access controls on sensitive data, including a requirement for two-factor smart card-based authentication to perform sensitive operations.
- Combinations of controls that enhance independent detection of malicious activity.
- Multiple levels of monitoring, logging, and reporting.
- Security reports can be used to monitor access patterns and to identify and reduce potential threats proactively.

- Microsoft administrative operations, including system access, are logged to provide an audit trail if unauthorized or accidental changes are made.

High availability

Azure facilities are designed to run 24x7x365 and use various measures to help protect operations from power failures, physical intrusions, and network outages. These data centers comply with industry standards for physical security and availability. Microsoft operations personnel manage, monitor, and administer these azure facilities.

Related Topics

Global Privacy Policy
Product Privacy Sheet - ClearID
Genetec Compliance Portal

ClearID subprocessors list

Genetec ClearID™ uses third-party vendors to assist Genetec™ in the provision of ClearID cloud services and which, as part of their responsibilities, might collect, access, store, or otherwise process customer data (including personal data).

For the latest information regarding third-party subprocessor vendors, see List of Subprocessors.

Related Topics

About ClearID information security on page 9

About ClearID information security

All data and files imported in Genetec ClearID™ are encrypted, and all communication with the platform is secure. These encryption and security measures ensure that sensitive data, files, and communications are only seen by users with the appropriate access.

Cryptography standards

- **Data encryption:** All personal information managed by ClearID is automatically encrypted using Advanced Encryption Standard 256 bits (AES-256) with symmetric keys that are dynamically generated. This automatic encryption ensures that each blob of data like an identity is given a unique AES key.

  For extra protection, the AES key is also encrypted with a public key unique to the account's private key. All the cryptographic keys used by ClearID are securely managed using the Azure Key Vault, which supports FIPS 140-2 Level 2 validated HSMs.
- **Data integrity:** A digital signature (SHA 512 with RSA) is generated to detect any attempts to modify data and ensure the integrity of the data and actions in the system. Analyzing and uniquely identifying all data using a complex algorithm prevents attackers from deleting, modifying, or adding content to data stored in ClearID.
- **Communication encryption:** Communication in the platform is secured using Hypertext Transfer Protocol Secure (HTTPS) protocol and Transport Layer Security (TLS) certificates to ensure that only trusted parties have access to data managed by ClearID. This communication encryption ensures the confidentiality of the information and reduces the possibility of malicious attempts to intercept or alter communication in transit.

Network and information security

As a trusted provider of security solutions for government agencies and high-profile public and private organizations worldwide, we take compliance with local laws seriously. This compliance includes the laws related to data security and protection of privacy in the territories where we sell our products and services.

To ensure that all customer data is stored and used appropriately and securely, ClearID is an ISO/IEC 27001 certified Information Security Management System.

- **Secure development and operations:** Our development and operations teams have been certified ISO 27001:2013. Our dedicated security team administrates and reviews architecture and design requirements, ensuring that we meet the highest industry standards and regulations, including General Data Protection Regulation (GDPR). Every change in ClearID undergoes a strict series of automated security tests and regular penetration tests performed by industry leaders in Information Security.
- **Zero-trust architecture:** Customer data is segmented over a series of microservices. Each microservice has one specific role in the system and the service has access only to the minimum data required to perform that task. There is no central repository of data that can be attacked. The information is distributed across siloed, independent repositories. The data center network is considered unsafe in our zero-trust architecture. All data transmitted and received between microservices is encrypted and digitally signed.
- **Service monitoring:** We subscribe to various security threat feeds and services, including Check Point, Microsoft, Mandiant, and Hyphen. Based on the nature of evolving threats, we adapt our controls as often as necessary.

Production environments are constantly monitored using the following monitoring services:

- Perform a series of synthetic transactions every 5 minutes to emulate users from different locations in the world.
- Constantly measure a series of metrics from the servers to detect any anomalies, such as a high number of web request failures.
- Automatically raise the alarm to our development and operations team, who take immediate action to correct the issue and mitigate any impact in the production environment.

The goal is to detect transient errors, data center issues, performance degradation, and ISP outages, before users notice any impact to their system.

User authentication

By default, ClearID uses Microsoft Entra ID B2C and Entra ID B2B for user authentication. Organizations can also federate their existing Active Directory (AD) user identities through Microsoft Entra ID, or any system that supports the OpenID Connect standard, to provide a single sign-on (SSO) experience and ensure that the system meets the corporate policies requirements for user authentication.

The authentication system is based on a passive authentication model with OAuth 2.0 and OpenID Connect, which allows the identity server (AD or others) to present the connection page immediately. Identity administrators can define how users are authenticated. For example, passwords, tokens, biometrics, or a combination of these techniques.

By using Active Directory, organizations can enforce a large variety of user and password validation rules and expiration requirements. A few examples of requirements include multi-factor authentication, deactivating a user credential after several failed sign in attempts, and many other configuration options.

Related Topics

Global Privacy Policy
Product Privacy Sheet - ClearID
Genetec Compliance Portal

How is ClearID different from traditional access control systems?

Use the following information to help you understand how Genetec ClearID™ is different from traditional access control systems.

In traditional access control systems, security personnel are constantly involved to grant or deny access to physical locations:

- Security personnel must verify with the room owners before granting access to someone.
- When the access is no longer required, the person never goes back to security to ask to be removed from the room.
- Most sites do not track or record why access was required.

In ClearID, the self-service Web portal reduces effort and increases flexibility by using *workflows* when employees, managers, and owners of the different secure areas request and grant access.

Requests are processed as follows:

1. Separate requests and approval workflows are created for each request.

   Each request includes the requester identity, time of request, reason for request, and other audit trail information.
2. Each request generates email notifications for the requester and for approvers.
3. After the request summary is confirmed, it is automatically assigned to the right individuals for approval.
4. The employee manager, area owners, and other approvers receive an email requiring them to approve, deny, or modify the submitted request.
5. After the approval process occurs, the requester receives an email notifying them whether their request was approved or rejected.

NOTE: Access, visit, or identity requests can be limited to a specific period, as opposed to the traditional method of an infinite period.

Using the self-service portal, employees can request access to specific areas in the same building or in a different site. Even when the site is managed by a different instance of Security Center.

If a person is traveling for the first time to an office managed by a different instance of Synergis™, the system automatically creates a cardholder and synchronizes all the credentials a few hours before the travelers arrive on site. On the last day of the trip, as specified in the access request, the system automatically revokes access to the secure area.

Related Topics

About workflows on page 12

About workflows

Genetec ClearID™ uses workflows to process, and then approve or reject, access requests, visit requests, or identity requests.

NOTE: Depending on how you configure your sites and areas, some of the workflow processes might not apply to your environment.

The following *workflows* are provided to support the different request types:

Access request workflow

An access request workflow is a series of activities performed by the system or authorized people during the life cycle of an access request. The activities can change the state and properties of access requests, affect other entities in the system, or wait for a condition to be met.

Visit request workflow

A visit request workflow is a series of activities performed by the system or authorized people during the life cycle of a visit request. The activities can change the state and properties of visit requests, affect other entities in the system, or wait for conditions to be met.

Visit request watchlist workflow

A watchlist workflow is a series of activities performed by the system or authorized people during the life cycle of a visit request if watchlists are enabled. The activities can change the state and properties of watchlists, affect other entities in the system, or wait for conditions to be met.

Identity request workflow

An identity request workflow is a series of activities performed by the system or authorized people during the life cycle of an identity request. The activities can create an individual identity, or multiple identities using a CSV import, and add each new identity to a role to inherit relevant access for a specified period.

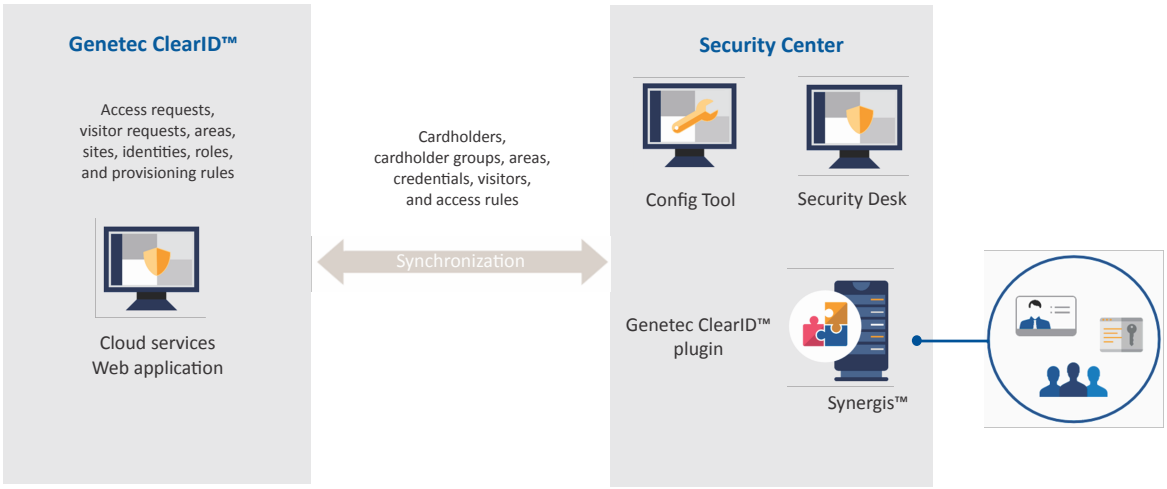
Related Topics

About access request workflow on page 150
About visit request workflow on page 357
About visit request watchlist workflow on page 358
About identity request workflow on page 201

How the integration works

The Genetec ClearID™ plugin is required to synchronize data between the Genetec ClearID™ web application and Security Center.

The components of the ClearID plugin integration



- **ClearID:** Genetec ClearID™ is a smarter way to manage physical access using a self-service solution for Synergis™.
- **ClearID plugin:** The ClearID plugin is installed on a Security Center server and runs as a plugin role. The Genetec ClearID™ Plugin integrates Genetec ClearID™ with Security Center and connects Synergis™ and ClearID cloud services. Any actions performed in ClearID are automatically synchronized with Synergis.
- **Security Center:** Security Center is a truly unified platform that blends IP video surveillance, access control, automatic license plate recognition, intrusion detection, and communications within one intuitive and modular solution. By taking advantage of a unified approach to security, your organization becomes more efficient, makes better decisions, and responds to situations and threats with greater confidence.

  The ClearID plugin is installed on a Security Center server. The plugin can be installed on the Directory or an expansion server.
- **Config Tool:** The ClearID plugin is also installed on a Config Tool workstation. The Security Center administrator uses Config Tool to create and configure the plugin role, configure database settings, and connection settings for ClearID. You can also configure a proxy connection if required. For example, when servers do not have internet access.
- **Security Desk:** Security Desk operators can create credentials, check in visitors, or assign and print badges.
- **Synergis:** Security Center Synergis™ is the IP access control system (ACS) that heightens your organization's physical security and increases your readiness to respond to threats. Synergis™ supports an ever-growing portfolio of third-party door control hardware and electronic locks. Using Synergis™, you can leverage your existing investment in network and security equipment.

The following information is extracted from Synergis for use by ClearID:

- Access rules
- Areas
- Cardholders
- Cardholder groups
- Credentials
- Schedules
- Visitors

NOTE: In Config Tool and Security Desk, entities managed by ClearID are highlighted with a blue dot in the bottom-right corner of the entity icon as follows:

- Access rules ()
- Areas ()
- Cardholders ()
- Cardholder groups ()
- Credentials ()
- ClearID partitions ()
- Visitors ()

Related Topics

Downloading and installing the plugin on page 87

Integration overview

You can integrate the Genetec ClearID™ web application with Security Center by installing and configuring the ClearID plugin and following a sequence of steps.

The following table lists the tasks required for the integration with Security Center, and how to verify that the integration is successful.

Step	Task	Where to find more information
	Understand the prerequisites and key issues before deploying	
1	Learn about what you can do using ClearID.	• What is ClearID? on page 2. • How is ClearID different from traditional access control systems? on page 11. • About workflows on page 12. • Supported features list for ClearID on page 25. • Supported languages on page 29.
2	Before installing the plugin, read the release notes to learn about the new features.	• What's new in ClearID on page 43.
3	Familiarize yourself with the common terms and their equivalents in Security Center.	• ClearID terminology on page 30.
4	Learn about the different components and how they connect.	• How the integration works on page 13. • About ClearID architecture on page 5. • ClearID subprocessors list on page 8. • About ClearID information security on page 9.
5	Learn about key features and understand the product.	• ClearID videos on page 31.
	Deployment Preparation	
1	Ensure that the plugin is installed on a server that meets the recommended system requirements and is running a compatible version of Security Center.	• Compatibility on page 73. • System requirements on page 74. • Firewall ports on page 75.
2	Learn about the devices that are supported for use with ClearID.	• Supported devices on page 77.

3	Familiarize yourself with deployment best practices.	• Best practices on page 80.
		  • Setting up ClearID for a new Synergis system on page 80.
		  • Setting up ClearID with an existing Synergis system on page 81.

	Prepare Security Center	

Step	Task	Where to find more information
1	Verify that the Security Center license has a valid certificate for the plugin. Go to the Config Tool homepage, click **About** > **Certificates**, and confirm that the ClearID plugin is in the list.	• Your license information is included in the license update email that we sent you. This email includes links to the download package and other license information. • To acquire a license, see License options.
2	To manage visitors in ClearID, verify that the Synergis™ visitor management module is enabled. Go to the Config Tool homepage, click **About** > **Synergis**™, and confirm that Visitors is in the list.	• Your license information is included in the license update email that we sent you. This email includes links to the download package and other license information. • To acquire a license, see License options.
	Deploy the plugin	
1	On a Security Center server, download and install the plugin.	• Downloading and installing the plugin on page 87.
2	Create the plugin role. **IMPORTANT:** Each plugin role can only connect to or communicate with one unique ClearID system name at a time. For environments with multiple systems, you must create a plugin role for each system.	• Creating the plugin role on page 88.

3	Connect Security Center to ClearID.
	NOTE: For environments with multiple systems, repeat these tasks for each system.
		• Connecting Security Center to ClearID on page 89.
		  • Reviewing cardholders and identities information on page 90.
		  • Adding a system on page 92.
		  • Downloading an activation file on page 95.
		  • Configuring connection settings on page 96.

4	Grant users the privileges they require to use the plugin. **NOTE:** Security Desk operators do not need special privileges to use this plugin.	• Granting user privileges on page 99. • Refer to the topic "Assigning privileges to users" in the *Security Center Administrator Guide*. • For a list of all available privileges, refer to the Security Center privileges spreadsheet for your version.
5	Learn about system states.	• About ClearID system states on page 100.
6	Learn about identity fields.	• Identity fields on page 113.

7	Learn about custom fields.	• About custom fields on page 101.
		  • Modifying custom fields on page 102.
		  • Custom fields relationships on page 105.

Step	Task	Where to find more information
	Manage identities and users	

1	Create, view, or modify your identities.	• Creating identities on page 111.
		• Viewing identities on page 122.
		• Modifying identities on page 125.
		  • Granting additional permissions for identities and roles on page 115.
		  • Granting additional permissions for supervisors on page 118.
		  • Viewing additional permissions on page 119.
		  • Modifying additional permissions on page 120.
		• Deleting identities on page 127

2	Grant users or administrators access to the web portal.	• Granting user access to the web portal on page 141. • Granting administrator access to the web portal on page 143.
3	View your profile.	• Viewing your profile on page 145.
4	View your site and area access.	• Viewing your site and area access on page 149.
5	Learn about and submit access requests.	• About access request workflow on page 150. • Requesting access on page 151.
6	Add your supervisors.	• Adding supervisors manually on page 158.
7	View and manage direct reports.	• Viewing direct reports on page 160. • Managing direct reports on page 163. • Transferring direct reports on page 169.
8	Learn how to reset user passwords.	• Resetting user passwords on page 177.
9	Learn about email notifications sent by ClearID.	• About email notifications on page 180. • Customizing the email banner for sites on page 182.
10	Learn about delegation.	• About delegation on page 186. • Delegating tasks to another user on page 188.
11	Understand the different user levels and what they can do.	• User levels on page 196.

Step	Task	Where to find more information

12	Learn about and submit identity requests.	• About identity request workflow on page 201.
		• Creating an identity template on page 202.
		• Requesting identities on page 209.
		  • Requesting an identity on page 210.
		  • Requesting multiple identities using a CSV import on page 214.
		• Canceling identity requests on page 223
		• Approving identity requests on page 226
		• About identity requests report on page 232
		• Checking the status of identity requests on page 233

	Credential replication	
1	Configure credentials replication.	• Configuring credential replication on page 236
2	Review the credentials logs	• Viewing credential synchronization logs on page 238
3	Force a credentials synchronization	• Forcing credential synchronization on page 240
	Manage your sites	
1	Learn about sites.	• About sites on page 242.
2	Create your sites in ClearID.	• Creating sites on page 243.
3	Enable visitor management for sites.	• Enabling visitor management for sites on page 247. • Viewing sites where a user can invite visitors on page 262.
4	Grant users permission to access ClearID.	• Granting access to the web portal on page 141.
5	Learn about access reviews.	• About access reviews on page 273.

6	Set up access reviews.	• Setting up area access reviews on page 277.
		  • Scheduling area access reviews on page 277.
		• Setting up identity access reviews on page 283.
		  • Scheduling identity access reviews on page 283.

Step	Task	Where to find more information
7	Learn about access reviews report.	• About access reviews report on page 288.
8	Check the status of access reviews.	• Checking the status of access reviews on page 289.
9	Complete an access review.	• Completing an area access review (site owner) on page 292. • Completing an area access review (area manager or role manager) on page 301. • Completing an identity access review (supervisor) on page 310.
10	Generate an access reviews report.	• Generating an access review summary on page 316.
11	Learn about access requests report.	• About access requests report on page 318.
12	Check the status of your access requests.	• Checking the status of access requests on page 319.
13	Learn about site activity report.	• About site activity report on page 322.

14	Learn about and manage webhook integrations.	• About webhooks on page 130.
		  • Creating webhooks on page 133.
		  • Modifying webhooks on page 137.
		  • Viewing webhook logs on page 138.

	Manage your areas	
1	Learn about areas.	• About areas on page 331.
2	Create your areas in ClearID.	• Creating areas on page 332.
3	Add doors to areas.	• Adding doors to areas on page 334.
4	Enable visitor management for your areas.	• Enabling visitor management for areas on page 335.
5	Learn about nested areas and access rules	• About nested areas on page 337 • Granting access to areas automatically on page 338
6	Add your area owners and managers.	• Adding area owners and managers on page 341.
7	Add your area schedules.	• Adding schedules to an area on page 342.

Step	Task	Where to find more information
8	Grant people access to an area.	• Granting access to an area on page 347.
9	Review who has access to your area.	• Reviewing area access on page 350.
10	Approve requests for access to your area.	• Approving area access requests on page 352.
11	Reject requests for access to your area.	• Rejecting area access requests on page 354.
	Manage your visitors	
1	Learn about visit request workflows.	• About visit request workflow on page 357. • About visit request watchlist workflow on page 358.

2	Invite visitors.	• Inviting visitors on page 359.
		  • Inviting visitors manually on page 360.
		  • Inviting visitors using a CSV import on page 365.

3	Review visit events.	• Reviewing visit events on page 374.
4	Copy a visit event.	• Copying a visit event on page 380.
5	Modify a visit event	• Modifying visit events on page 381.
6	Learn about visitors report.	• About visitors report on page 385.
7	View a visitors report.	• Viewing a visitors report on page 386.
8	Learn about QR codes as a credential for visitors.	• QR codes as a credential for visitors on page 388.
9	Import the custom card format (QR code credential).	• Importing a custom card format (QR code credential) in Synergis on page 388.
10	Enable QR code credentials for visitors.	• Enabling QR code credentials for visitors on page 391.

11	Configure Qscan barcode readers for ClearID.	• Configuring Qscan devices for ClearID on page 394.
		  • Connecting a Qscan barcode reader to a Mercury Controller on page 394.
		  • Configuring Qscan barcode reader to support 40-bit hexadecimal QR codes on page 397.

Step	Task	Where to find more information

12	Configure STid devices for ClearID.	• Configuring STid devices for ClearID on page 399.
		  • About STid QR code readers on page 400.
		  • Creating an STid QR code reader configuration on page 403.
		  • Transferring your reader configuration to your STid QR code reader on page 417.

13	Configure macro for automatic check-in and access to a parking entrance or gated facility.	• Automating visitor access and check-in using a macro on page 422.
	Managing visitor watchlists	
1	Learn about watchlists.	• About watchlists on page 426.
2	Add your watchlist managers.	• Adding watchlist managers on page 428.

3	Add your watchlists.	• Adding watchlists on page 430.
		  • Adding an individuals watchlist entry on page 434.
		  • Adding a companies watchlist entry on page 437.
		  • Importing watchlist entries from a file on page 438.
		  • Exporting watchlist entries to a file on page 440.
		  • Testing watchlist entries on page 441.

4	Screen your visitors manually	• Screening visitors manually on page 449.
5	Unblock visitors blocked by a watchlist.	• Unblocking visitors blocked by a watchlist on page 453.
	Managing role-based access control	
1	Learn about role-based access control.	• About role-based access control on page 458.
2	Add your roles.	• Adding roles on page 460.
3	Add your role managers.	• Configuring role managers on page 462.
4	Configure your role-based access control policies.	• Configuring role-based access control policies on page 464.
5	Add custom provisioning attributes to an identity.	• Adding custom provisioning attributes to an identity on page 470.

Step	Task	Where to find more information
6	Add your role members.	• Adding role members on page 472.
	Connecting other systems	
1	Learn how to authenticate non-user system connections.	• Authenticating your connection on page 479.

2	Synchronize identity attributes using LDAP.	• Synchronizing identities using LDAP on page 551.
		  • About ClearID LDAP Synchronization Agent on page 551.
		  • LDAP attributes to ClearID attribute mappings on page 552.
		  • Configuring the ClearID LDAP Synchronization Agent on page 553.

3	Synchronize identity attributes using an API.	• Synchronizing identities using an API on page 483. • About the ClearID API on page 483.

4	Synchronizing identity attributes using One Identity.	• Synchronizing identities using One Identity on page 502.
		  • About the One Identity Synchronization Tool on page 503.
		  • About One Identity Synchronization Tool attribute fields on page 506.
		  • Installing the One Identity Synchronization Tool on page 510.
		  • Configuring the One Identity Synchronization Tool on page 519.
		• Reviewing synchronization status on page 547.
		• About One Identity Synchronization Tool logs on page 548.
		• Viewing One Identity Synchronization Tool logs on page 549.
		• Updating existing identities from an external data source on page 550.

	Visitors self-service check-in	

1	Learn about Genetec ClearID™ Self-Service Kiosk.	• About ClearID Self-Service Kiosk on page 560.
		  • Self-Service Kiosk check-in on page 561.
		  • Self-Service Kiosk self registration on page 562.

Step	Task	Where to find more information

2	Learn about the different ClearID Self-Service Kiosk options that are available.	• Self-Service Kiosk options on page 615.
		  • Kiosk floor stand on page 617.
		  • Kiosk floor stand printer shelf on page 621.
		  • Kiosk tabletop stand on page 623.

3	Learn about the Identity Document (ID) types that the ClearID Self-Service Kiosk ID scanning function supports.	• Identity document types on page 626.

4	Configure your ClearID Self-Service Kiosk.	• Configuring the Self-Service Kiosk iPad on page 564.
		  • Customizing the Self-Service Kiosk configuration on page 567.
		  • Customizing the Self-Service Kiosk visitor badge logo on page 569.
		• Configuring the Self-Service Kiosk label printer (Brother QL-820NWBc, QL-820NWB, or QL-810W) on page 584.
		• Configuring the Self-Service Kiosk label printer (Brother TD-4550DNWB) on page 593.
		• Selecting a Self-Service Kiosk label printer on page 603.
		NOTE: The Brother TD-4550DNWB printer is **no longer available** for purchase through Genetec. We now support and sell the Brother QL820NWBc (CD-KIOSK-PRINTER-NA-KIT).

5	Test your visitor badge printing.	• Printing a test badge from the Self-Service Kiosk on page 609.
6	Reset the ClearID Self-Service Kiosk mobile app (If required).	• Resetting the Self-Service Kiosk mobile app on page 613.
	Troubleshooting	
1	Learn how to troubleshoot issues that might occur.	• Plugin installed, but missing from Security Desk and Config Tool on page 653. • Plugin role could not find file with certificate on page 654. • Custom fields not displayed in Security Desk on page 655. • No active account found for user on page 658. • Visit email notifications not received by visitors on page 659. • Visitor hosts fields in Security Desk are empty on page 660. • Connectivity issues (One Identity Synchronization Tool) on page 662.

Step	Task	Where to find more information
		• Data synchronization issues (One Identity Synchronization Tool) on page 663. • Self-Service Kiosk issues on page 665. • Self-Service Kiosk label printer issues on page 668. • Viewing webhook logs on page 138.

Related Topics

License options on page 70

Supported features list for ClearID

Discover the Genetec ClearID™ supported features.

The following table lists the features that are available in ClearID.

Feature
Identity management
Supervisor management of direct reports.
Transfer of direct reports
Configuration for supervisors to have elevated management permission for their direct reports. • Update profile information fields. • Update access control settings.
Identity request workflow and approval for onboarding: • One identity at a time. • Many identities at a time (CSV import).
Permissions for identities or roles to view and edit identities.
Area management
Delegate the management of controlled areas to one or more area owners.
Area owner or area manager can view, add, and remove people from **Areas**.
Area owner or area manager can view, add, and remove roles from **Areas**.
Area owner or area manager can grant temporary access to a role.
A permanent cardholder can request temporary access to an area (built-in workflow).
Actions in workflow are captured and available in the workflow history.
Area managers can approve or deny access requests.
Area managers can perform area access reviews.
Employee supervisor can be required to approve employee access request.
Email notifications when an access request is submitted.
Email notifications when an access request is approved or denied.
Role management
Delegate the management roles or cardholder group to one or more role owners.
Role managers can add or remove people from their groups.
Automatic provisioning and synchronization of cardholder groups for multiple sites

Feature
Role owners can request access to an area for their entire group.
Role managers can perform role access reviews.
Multi-site management
Global management of cardholders for multiple Synergis™ systems
Time zone support (built-in)
Automatic synchronization of permanent credentials when someone travels between sites.
Synchronization of cardholders only happens when cardholders are changed, if the cardholder has access on that Synergis system. This approach minimizes the number of cardholders synchronized to each Synergis system.
Synchronization of cardholder groups only happens when cardholder groups are changed, if the cardholder group has access on that Synergis system. This approach minimizes the amount of cardholder groups synchronized to each Synergis system.
Site owners can configure access review schedules or manually trigger access reviews.
Site owners can generate an access reviews report.
Visitor management
Preregister visitors using a web portal
The visitor approval workflow can be customized based on the area selected.
Automatic provisioning of visitors with the required areas automatically assigned
Visitor check-in using `Security Desk`

Paper badges and temporary credentials
• Paper badges are typically used for large volumes of visitors who require temporary access, for example:
  • Hosting a conference or trade show for business partners.
  • To identify people visiting an area, temporary visitor badges can also be stuck on visitors' clothing.
• Security or reception issue temporary credentials after visitors check-in. These temporary credentials are returned to security or reception when leaving the *site* or *area*.

Visitor escort with multiple visitor hosts
Email notifications when a visitor is approved.
Capture and report the visit reason. Security staff can use the visit reason information to help track who enters or exits a building and the reason for the visit.
Email invitation sent to visitor with a meeting invite, site details, and optional file attachments
Send SMS notifications to the host when a visitor checks in.

Feature
These SMS notifications can be sent to any valid phone number.
Send email notifications to the watchlist manager when visitor details match a person of interest or company of interest on an individuals or companies block or notify watchlist.
Visitor entry is blocked when visitor details match a person of interest or company of interest on an individuals or companies block watchlist.
Configurable Genetec ClearID™ Self-Service Kiosk options. For example, customizing the welcome screen QR code, ID, check-in, check-out, and self-registration option combinations that are displayed.
Configurable options to capture extra visitor information during the creation process for a visit event. For example, delivery ID, vehicle, passenger name, ID number, or license plate.
Configurable automatic visitor check-out (grace period).
Reports
Reports including CSV downloads (where applicable). Workflow request reports: • Access requests report • Access reviews report • Visitors report Audit trail reports: • Role activity report • Site activity report • Site and area owners report • User activity report
Platform
Corporate logo for Portal and email notifications
Cloud platform ClearID is a cloud service. A dedicated server is not required. However, a communications connection to the Synergis servers is required. This connection is provided by the ClearID plugin.
HTML5 web interface with mobile support Users can use their mobile devices to navigate the ClearID portal.
REST API available to automate any functions available in the Web portal. • Create or edit an identity in the system. • Disable access for a person. • Add a person to a role. • Remove a person from a role. • Create a visitor event. • Acknowledge an access request.
Synchronize identity using Microsoft SQL Server.

Feature
Synchronize identity from custom source using Identity REST API.
Security and authentication
Support multi-factor authentications for users using OpenID connect
Single sign-on using Microsoft Office 365
Single sign-on using Microsoft Entra ID
ISO 27001 certification For more information, see Cybersecurity resources.
AES-256 encryption with RSA Personal data managed by ClearID is always encrypted.

Related Topics

Genetec Compliance Portal

Supported languages

Genetec ClearID™ is available in the following languages.

ClearID web portal

- English
- French
- Spanish
- Dutch
- German
- Italian
- Portugese
- Japanese

NOTE: The language that is displayed in the web portal user interface is determined by your web browser language settings.

ClearID plugin

- English

Genetec ClearID™ One Identity Synchronization Tool

- English

Genetec ClearID™ LDAP Synchronization Agent

- English

Genetec ClearID™ Self-Service Kiosk mobile app

- English
- French
- Spanish
- Dutch
- German
- Italian
- Portuguese
- Japanese

Documentation

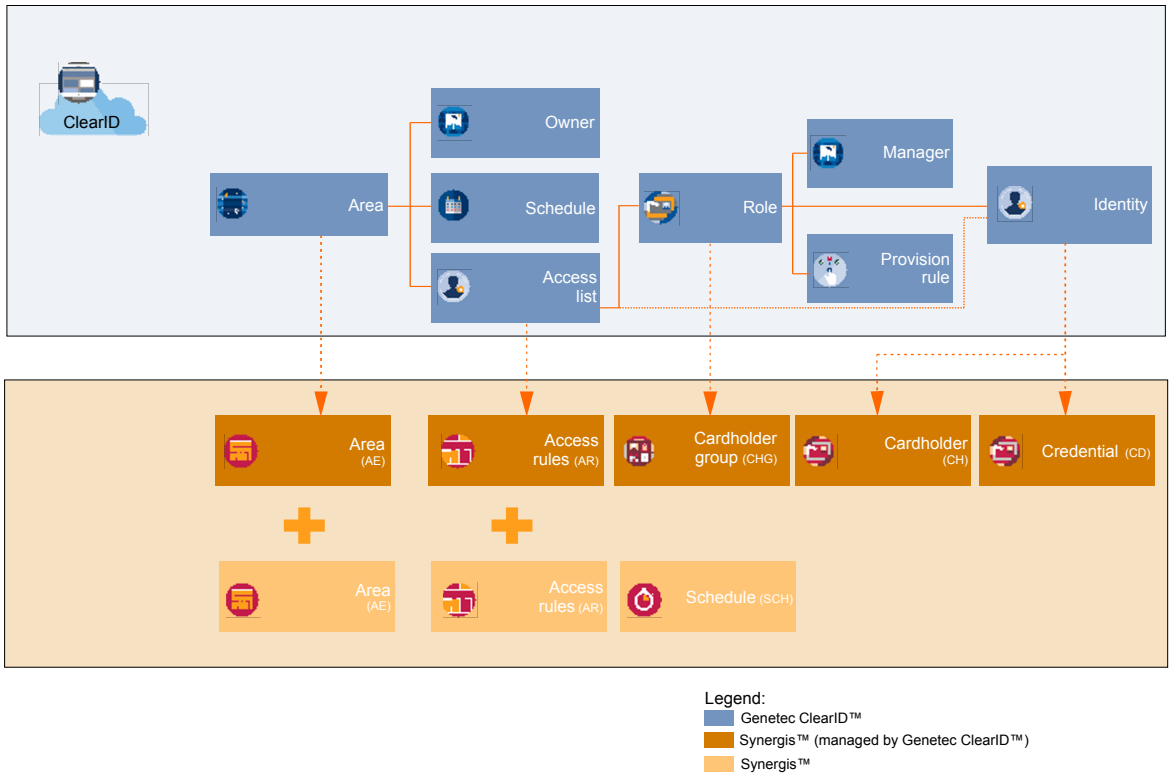
- *Genetec ClearID™ User Guide* (English)
- *Genetec ClearID™ User Guide* (French)
- *Genetec ClearID™ User Guide* (Spanish)

IMPORTANT: Translation of documentation is ongoing. Documentation in languages other than English might not be complete at the time of release. For the latest version of the documentation, see the Genetec TechDoc Hub.

ClearID terminology

Genetec ClearID™ uses specific terms. Here are the definitions of some common terms and their equivalents in Security Center.

The following diagram shows ClearID terms and their equivalents in Security Center:

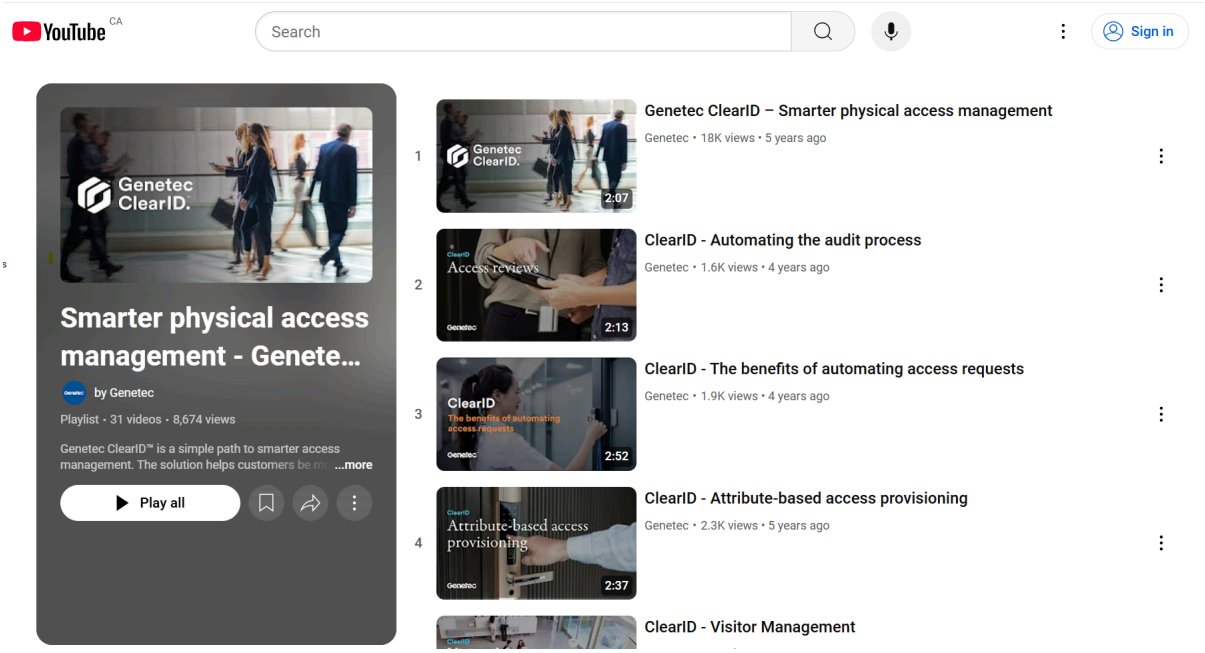


The following table lists ClearID terms and their equivalents in Security Center:

ClearID	Security Center
Identity	Cardholder
Area	Area
Role	Cardholder group
Schedule (defined in Security Center) and access list (defined in ClearID)	Access rules

ClearID videos

Use the Genetec ClearID™ videos to help you learn about key features and understand the product. You can access all the videos in one place, the ClearID videos playlist.



Click the image to access the ClearID videos playlist.

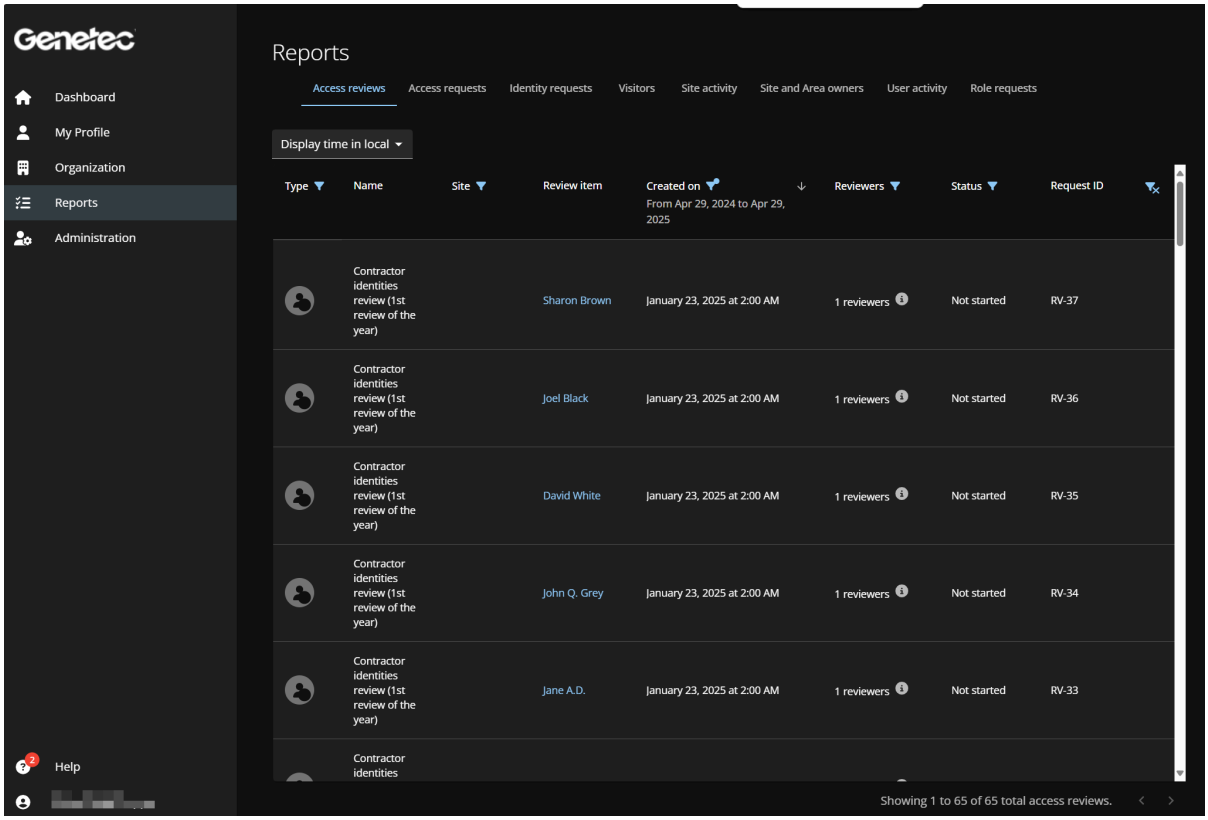
Videos can also be launched individually from relevant topics or the documentation homepage.

Related Topics

What is ClearID? on page 2

About reports

Genetec ClearID™ provides several reports to manage your site and various activities. The reports can help you understand the status of access requests, access reviews, and current or upcoming visit events. Reports can also be used to review audit trail information about roles, sites, site and area owners, and users.



You can use the following reports to check the status of the following:

- Access reviews report
- Access requests report
- Identity requests report
- Direct reports report
- Site and area owners report
- Visitors report

You can use the following reports to review audit trail information about the following:

- Role activity report
- Site activity report
- User activity report

Logging on to ClearID

Log on to your Genetec ClearID™ account to submit visitor or access requests.

Before you begin

- Enable cookies in the web browser that you are using
- If you are not using a corporate Active Directory system, activate your ClearID account by clicking the activation link in your email.

Procedure

1 In your web browser, enter or select the required host as detailed in your account activation email.

For example:

- United States: https://portal.clearid.io/
- Australia: https://portal.au.clearid.io/
- Canada: https://portal.ca.clearid.io/
- Europe: https://portal.eu.clearid.io/

NOTE: If a corporate log on (single sign-on using Microsoft Office 365 or similar) is used, the account is automatically activated and no activation email is received.

2 On the *logon* page, enter your *username* and click **Logon**.

You are redirected to your user account's logon page.

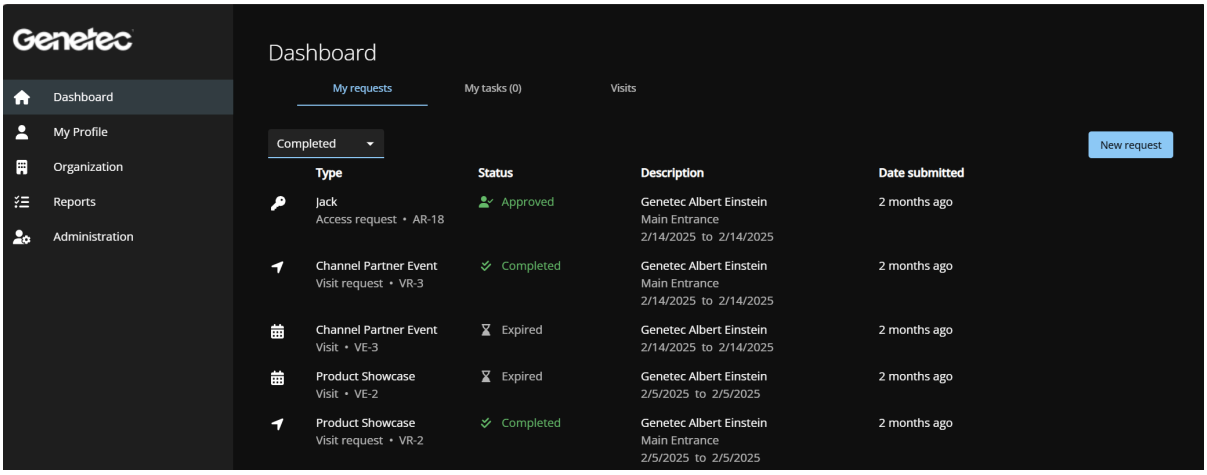
3 (Optional) Select an account.

- The account ID is shown in the URL of every page.

  For example, *https://hostname/accountid/currentpage*.
- The account ID can change depending on the user account that is logged on.

TIP: If you have more than one account, you can switch accounts at any time by clicking **Change account** from the account options under the user ID.

The *My requests* page is displayed and you are ready to use ClearID.



Related Topics

Creating identities on page 111
Authenticating your connection on page 479

Logging off from ClearID

To exit from Genetec ClearID™, you can log off from your user account.

What you should know

You are logged off from the system automatically after a specified period of inactivity. The inactivity period varies depending on your environment configuration. The default is 30 minutes.

Procedure

- At the top of the page, click your name, and then click **Log off**.
  TIP: After you log off from of your account, close all browser windows that were used for ClearID.

Enabling preview features

When available, users can enable one or more preview features in Genetec ClearID™ to get early access to evaluate new functions before they are released.

Before you begin

The **Preview features** function must be enabled for your organization.

What you should know

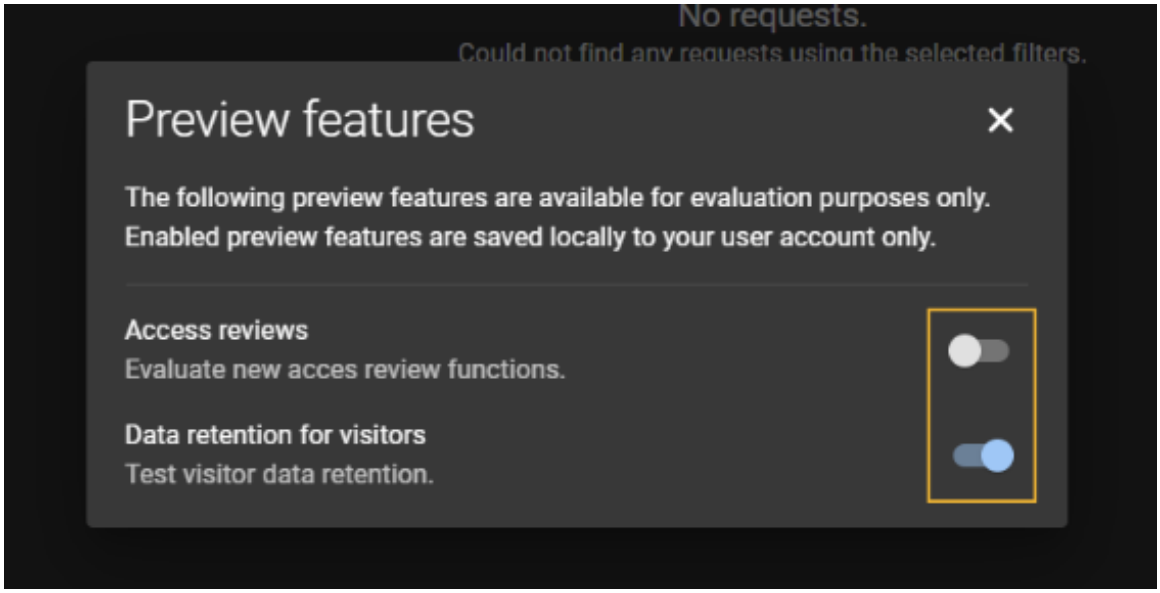
- Preview features are for evaluation purposes only.
- Enabled preview features are saved locally to your user account only.

Procedure

1 In the ClearID web portal, click your user name.

2 Click **Preview features**.

3 In the *Preview features* dialog, use the preview features slider controls to enable the features you want to evaluate.



4 Click ✕ to close the dialog.

Disabling preview features

Users can disable one or more preview features in Genetec ClearID™ if they no longer want to use or see the new preview features.

Before you begin

The **Preview features** function must be enabled for your organization.

What you should know

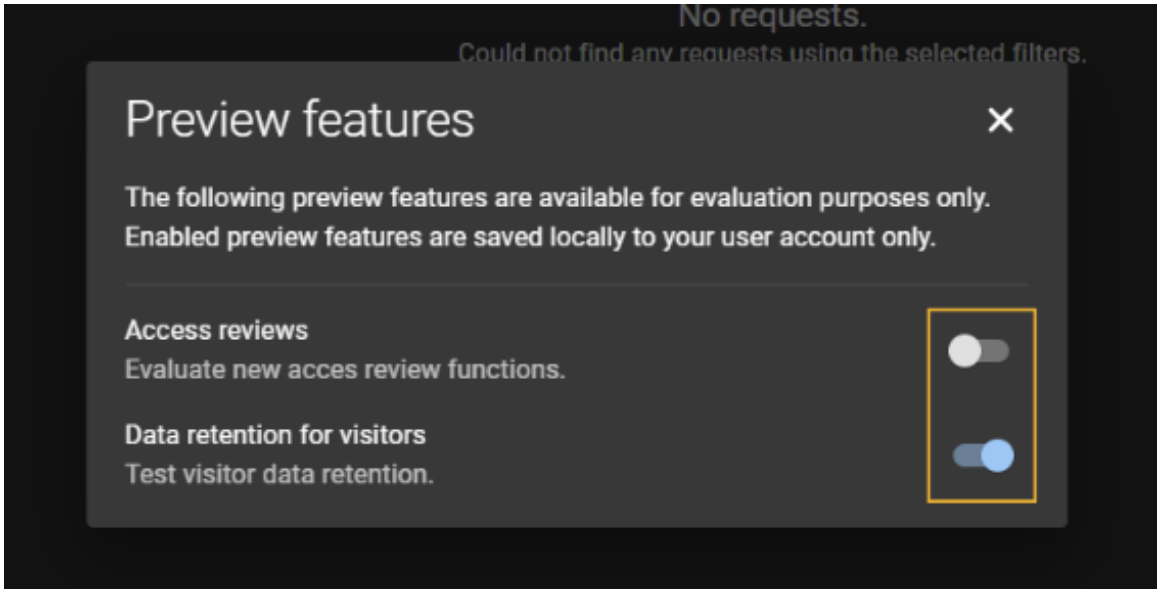
- Preview features are for evaluation purposes only.
- Enabled preview features are saved locally to your user account only.

Procedure

1 In the ClearID web portal, click your user name.

2 Click **Preview features**.

3 In the *Preview features* dialog, use the preview features slider controls to disable the features you no longer require.



4 Click ✕ to close the dialog.

Customizing portal branding

As an account administrator, you can customize the Genetec ClearID™ portal logo and accent color to align with your company's branding.

Before you begin

You must be an *Account administrator* to customize the ClearID portal branding.

What you should know

- You can set different branding options for light and dark themes in ClearID.

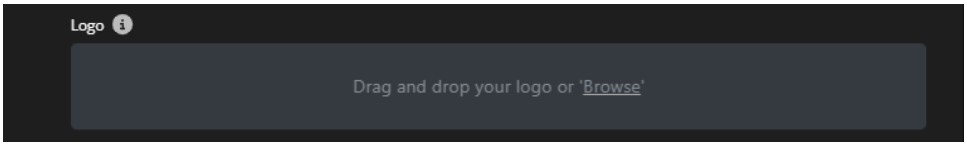
Procedure

1 In the ClearID web portal, click **Administration** > **Account configuration**.

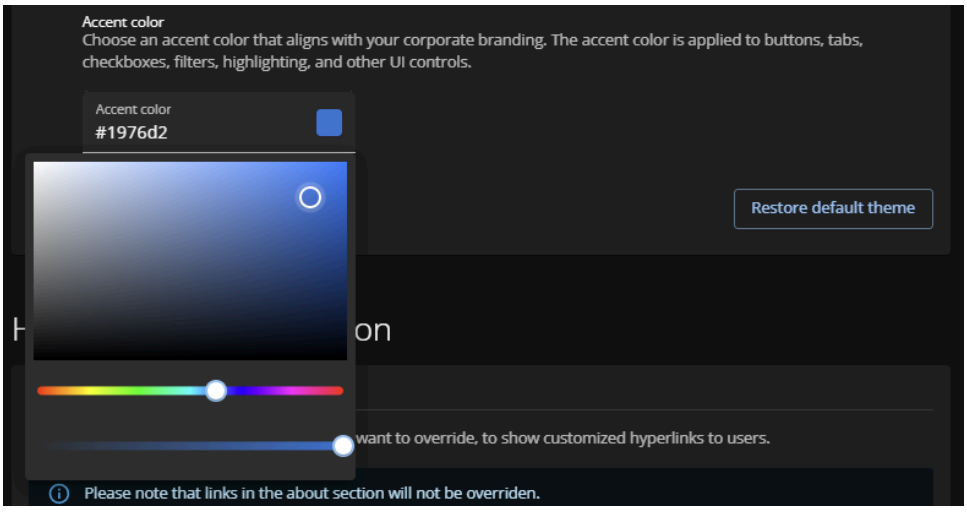
2 In the *Branding* section, choose either light theme or dark theme.

a) Select the logo and accent color.

- **Logo:** Click **Browse** or drag and drop an image from your file browser to upload your logo. The image must have a resolution within the range of 20x20 and 2000x500 pixels.



- **Accent color:** Use the color picker to select a color and adjust the opacity, or type the hexadecimal code of the color in the **Accent color** field.



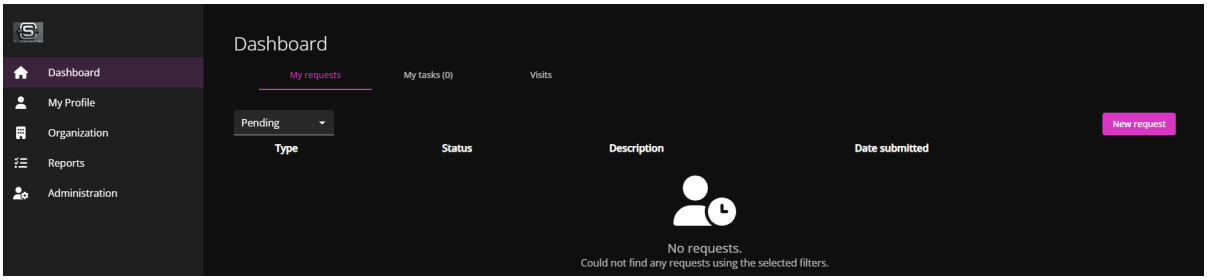
- **(Optional):** Click **Restore default theme** to restore the portal branding to default.

3 Click **Save**.

4 (Optional) Repeat steps 2 - 3 for other themes as required.

Example

Customized branding is applied to the portal logo, buttons, and highlight color.


Dashboard
My Profile
Organization
Reports
Administration
Dashboard
My requests
My tasks (0)
Visits
Pending
New request
Type
Status
Description
Date submitted
No requests.
Could not find any requests using the selected filters.

Customizing help menu links

As an *Account administrator*, you can customize the Genetec ClearID™ **Help** menu links, directing portal users to your company's support resources and pages.

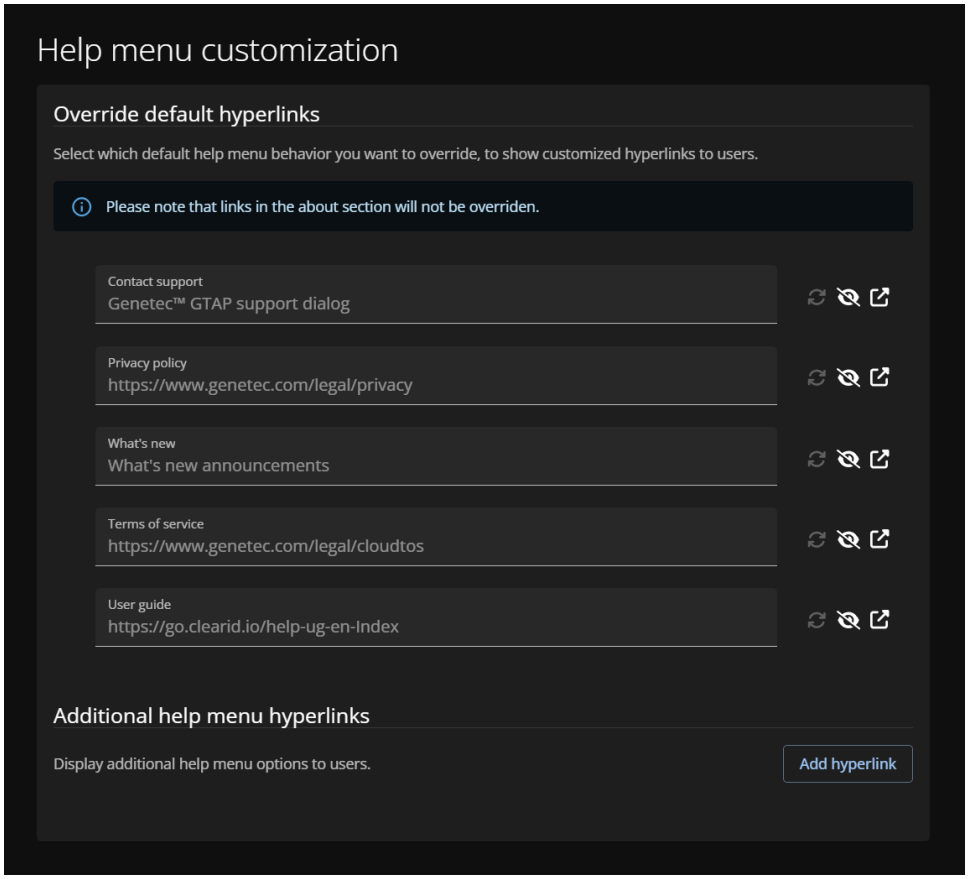
Before you begin

You must be an *Account administrator* to customize the links in the ClearID **Help** menu.

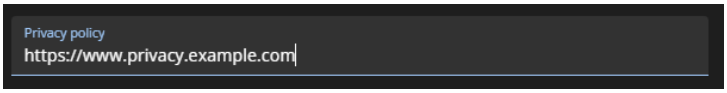
Procedure

1 In the ClearID web portal, click **Administration** > **Account configuration**.

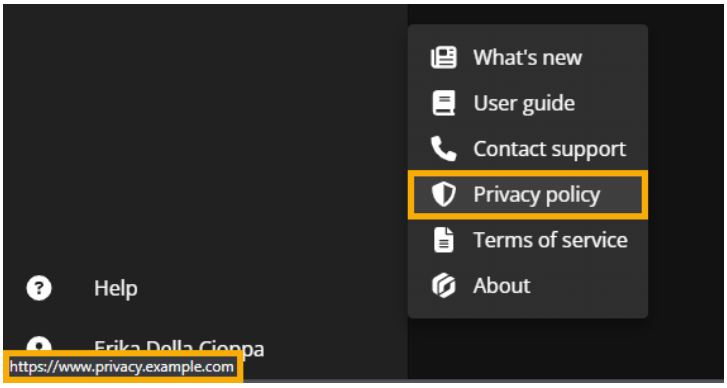
2 In the *Override default hyperlinks* section, modify the default **Help** menu links.
NOTE: You can't override the **About** link.



a) Select the **Help** menu item you want to modify.
b) Type the URL you want the user to be directed to under the selected header.



c) Click **Save**.

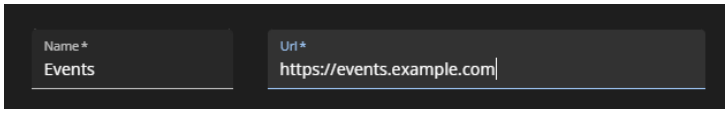


3 (Optional) In the *Additional help menu hyperlinks* subsection, add more links to the menu.

a) Click **Add hyperlink** to add a new menu item.

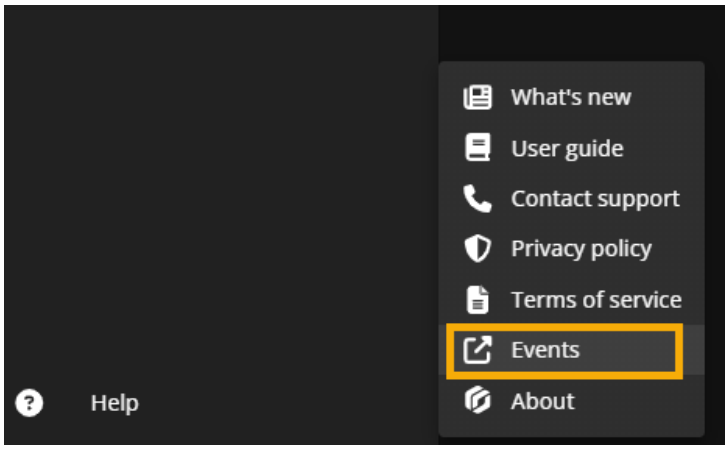
b) In the **Name** field, type a name for your new menu item.

c) In the **URL** field, type the URL for the new menu item.



d) Click **Save**.

The new link is added to the menu below the default portal links.



4 (Optional) Use the icons beside each link to reset, hide, or view menu items.

- Click **Revert to default** ( ) to revert the customized link to the portal default.
- Click **Hide** ( ) to hide the link from the menu.
- Click **Show**( ) to show a previously hidden link.
- Click **Go to URL** ( ) to go to the linked page.
- Click **Delete** ( ) to delete the custom link.

2

What's new

Check out what's new in the latest update to ClearID.

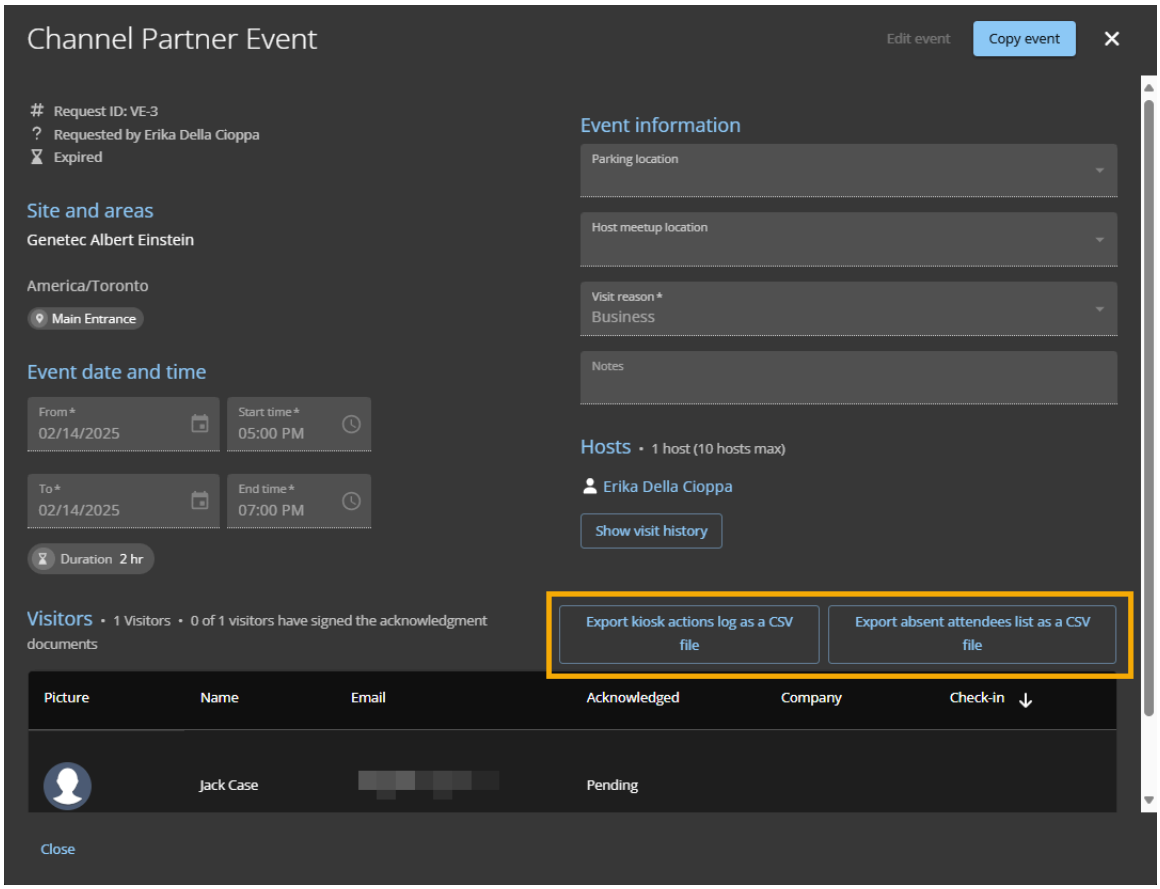
This section includes the following topics:

What's new in ClearID

Check out what's new in the latest update to Genetec ClearID™.

What's New: May 2025

- **Visit event logs:** *Account administrators*, *Site owners*, and hosts can track operator and visitor actions on check-in devices and export lists of invited visitors who didn't check in.



For more information, see About visit event logs on page 376 and Viewing visit event logs on page 378.

- **Account-level notification preferences:** *Account administrators* can manage the default email notification preferences for all ClearID portal users and decide which stakeholders receive notifications. You can also configure whether users can opt out of certain email notifications in their personal email notification preferences.

For more information, see Configuring email notification preferences (administrator) on page 183.

For a complete list of all prior announcements, see Previous features and enhancements.

Previous features and enhancements

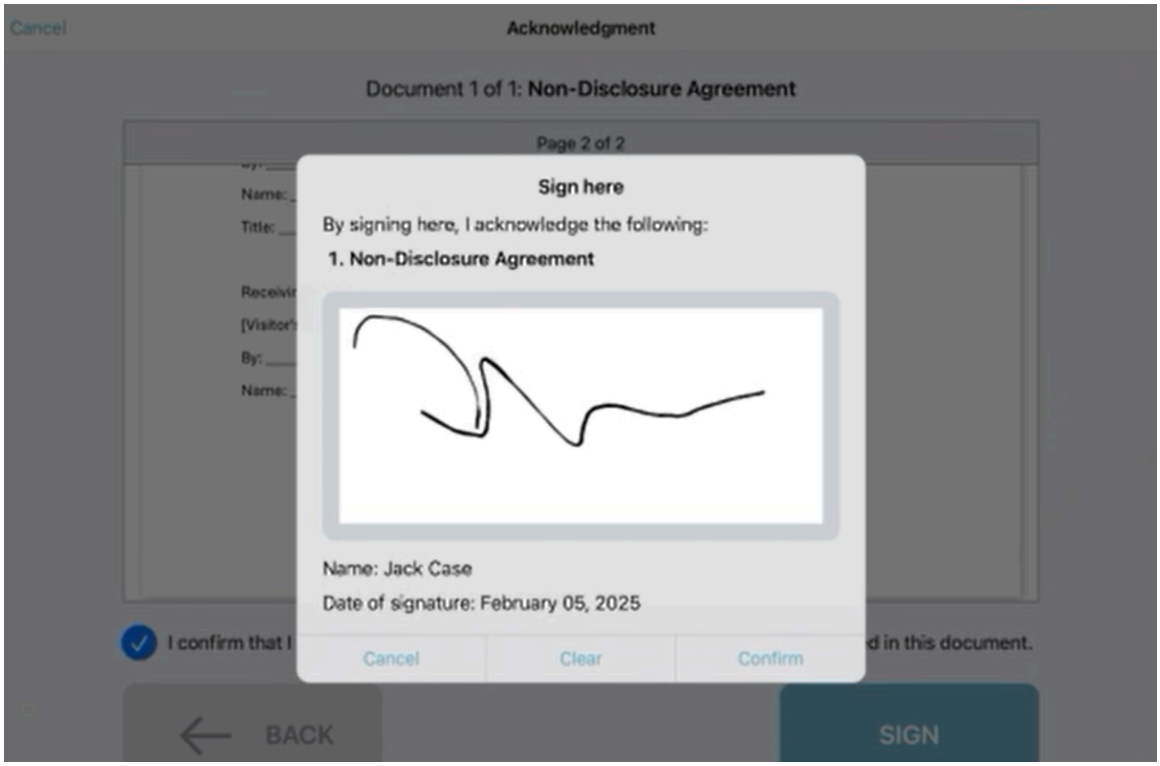
The Genetec ClearID™ solution includes the following features and enhancements.

What's New: January 2025

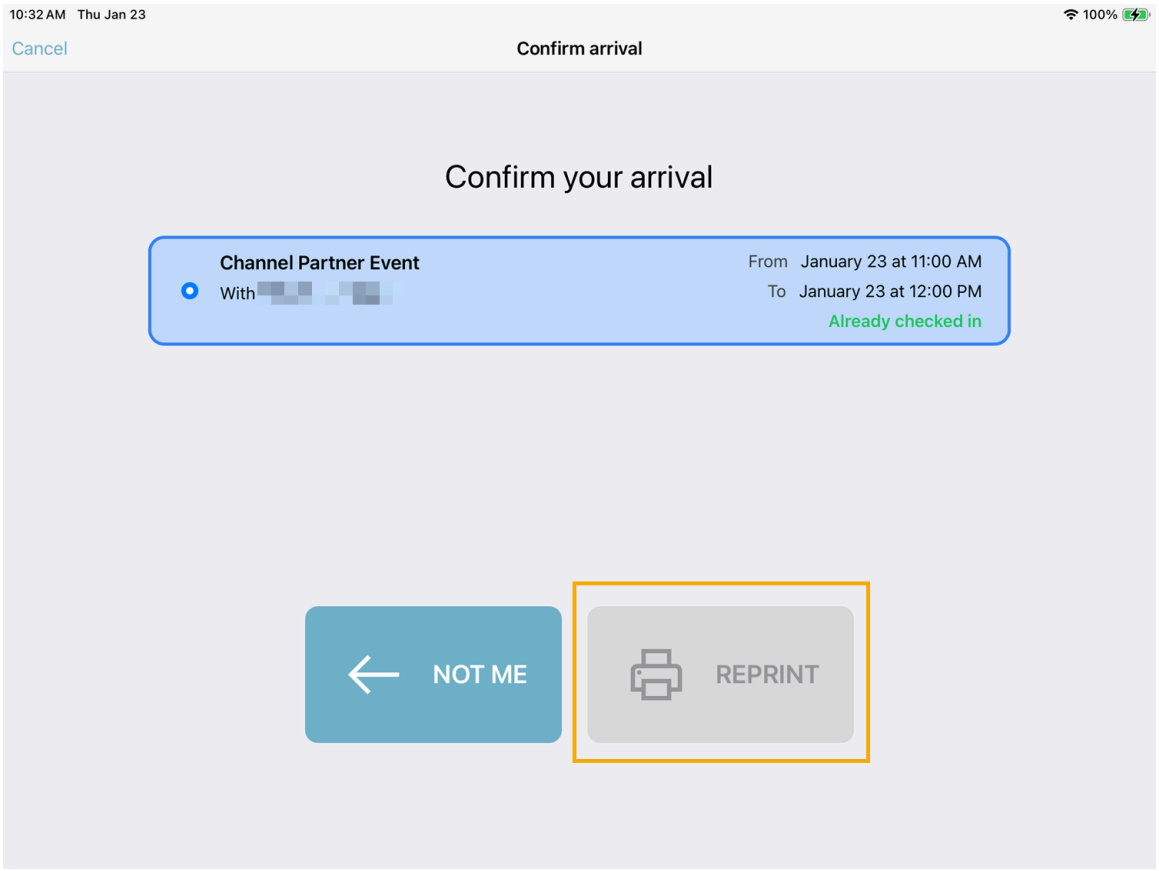
- **Check visitors in using ClearID mobile operator check-in:** Previously, visitors could only check in to events using the Self-Service Kiosk iPad. Now, receptionists, security guards, and attendants at hosted events can quickly check visitors in using the ClearID Self Service Kiosk app on an iPhone. Mobile operator check-in uses the iPhone to scan QR codes and look up visit information.

  For more information, see Mobile operator check-in on page 576 and Configuring mobile operator check-in on page 579.
- **Make informed decisions when granting employees access:** You can now specify that employees upload supporting documents when submitting access requests for secure areas where specialized certifications are required to gain access. *Site owners* and *Area approvers* can review submitted documents to ensure that employees requiring access comply with industry regulations and company policies before granting them access.

  For more information, see Configuring access request documents for sites on page 266 and Configuring access request documents for areas on page 344.
- **Ensure visitors comply with site requirements:** You can now specify that visitors read and sign required compliance documents during a Self-Service Kiosk check-in. *Account administrators* can add up to five documents to the Kiosk, including non-disclosure agreements, waivers, on-site instructions, and more.



  For more information, see Adding PDF acknowledgment documents to the Self-Service Kiosk.
- **Visitors can reprint badges:** Visitors can now reprint lost or damaged badges directly from the Self-Service Kiosk. As a *Site owner*, you can activate the **Re-print badge** option so that visitors can return to the Kiosk to reprint their temporary badge.



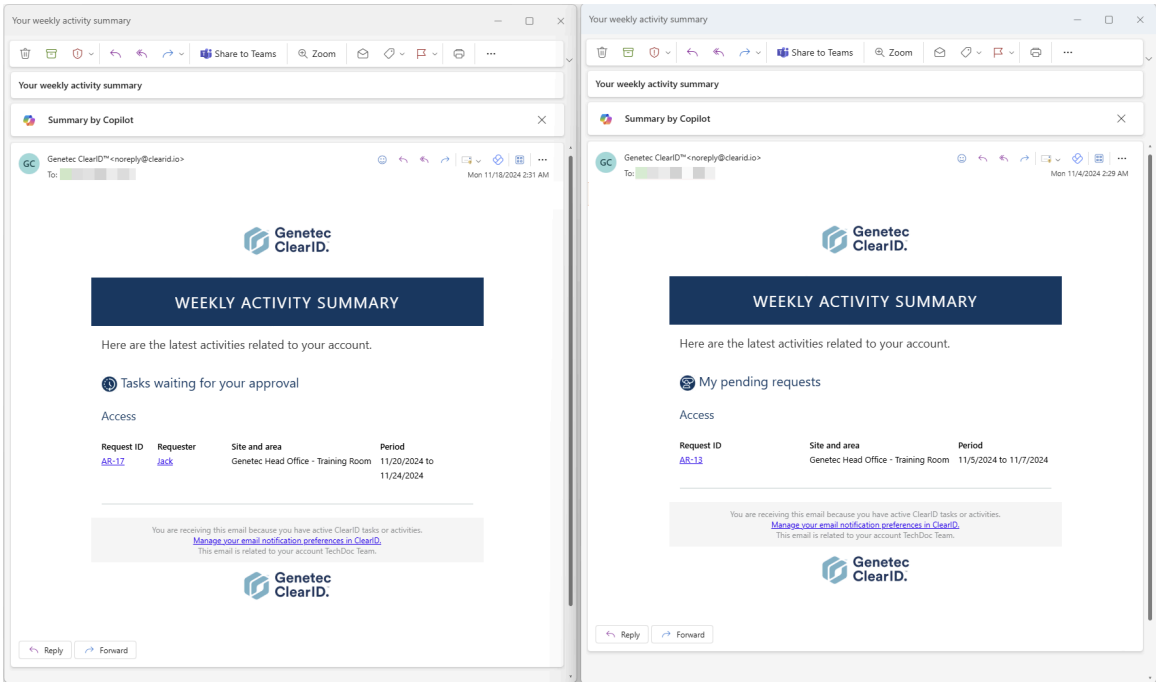
For more information, see Activating badge reprints.

- **Protect visitor privacy:** *Site owners* can now deactivate photo-taking during visitor check-in at the Self-Service Kiosk.

  For more information, see Disabling visitor photo during check-in.

What's New: December 2024

- **Keep track of your pending tasks:** You can now receive Weekly Activity Summary emails every Monday detailing pending tasks or requests that require approval. You won't receive these emails if you don't have any pending tasks or requests. To manage your email preferences, go to **My Profile** > **Preferences** > **Notifications**.



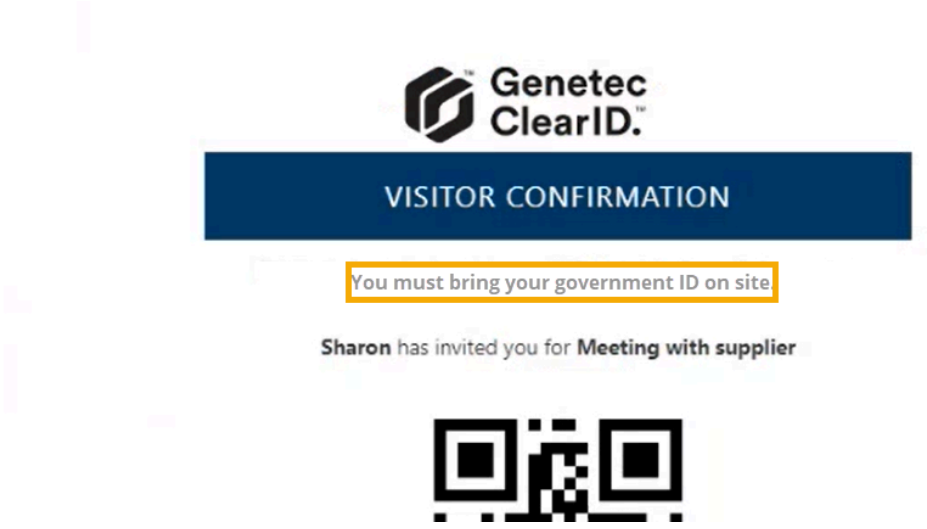
For more information, see About email notifications and Configuring your email notification preferences.

What's New: October 2024

- **Synchronize ClearID identity pictures with Security Center:** *Account administrators* can now set ClearID as the preferred data source for all cardholder pictures in Security Center. You can activate identity picture synchronization to automatically replace cardholder pictures in Security Center with ClearID identity pictures.

  NOTE: ClearID identity pictures have a maximum size of 5 megabytes.

  For more information, see Synchronizing identity pictures with Security Center.
- **Personalize notification email header and footer text:** *Account administrators* and *Site owners* can now customize the header and footer text of email notifications. Use the custom text fields to communicate information to visitors such as equipment or documentation requirements for their visit or steps to complete before arrival.



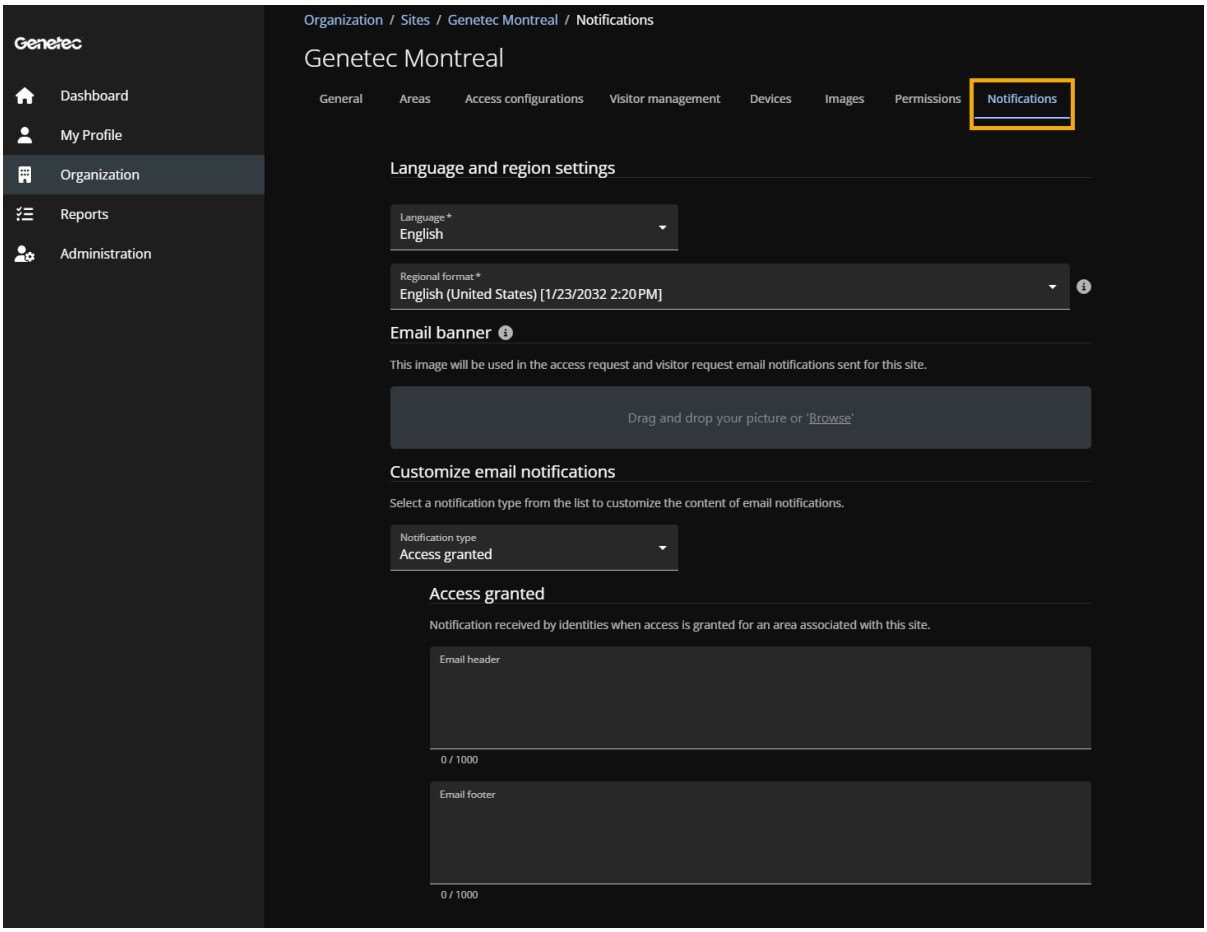
For more information, see Customizing email notifications for sites on page 269.

- **ClearID Self-Service Kiosk mobile app version 2.2 is now available:** The latest update includes bug fixes and improved diagnostics for visit events. Core functionality of the kiosk remains the same.

  To download the ClearID Self-Service Kiosk mobile app, visit the App Store.

IMPORTANT: User interface changes

- **Language and region settings and notification settings have moved:** Previously language and region settings and notification settings were configured by *Account administrators* or *Site owners* by clicking **Organization** > **Sites** > **General**. Now, these settings are configured in the **Notifications** tab by clicking **Organization** > **Sites** > **Notifications**.



  For more information, see Creating sites on page 243 and Modifying sites on page 263.

What's New: September 2024

- **Cardholder credential synchronization:** ClearID accounts connecting to multiple Security Center systems now have a new configuration setting. Administrators can now specify the Security Center system that is the source of credentials synchronized to other systems. This option makes credential synchronization automatic and predictable and can give employees access to multiple sites with a single access card.

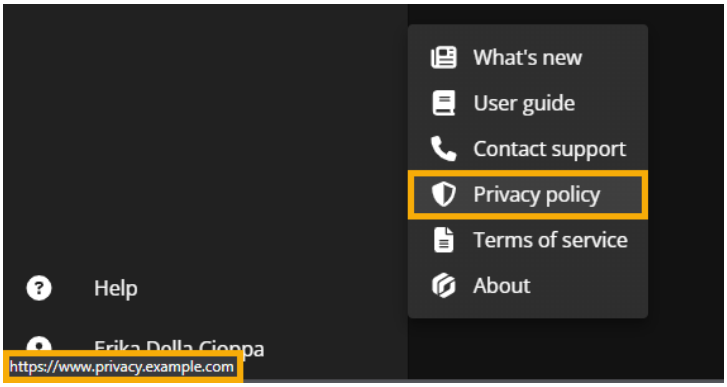
  For more information, see Configuring credential replication on page 236.

- **Simplified identity management:** You can now use the System for Cross-domain Identity Management (SCIM) integration to synchronize system attributes from an external data source into ClearID. These identity attributes can then be used in ClearID to assign people to roles and automate role-based access control.

  For more information, see Synchronizing identities using the SCIM integration.

- **ClearID Self-Service Kiosk mobile app version 2.1.2 is now available:** The latest update includes performance and scalability improvements, bug fixes, and some minor changes to the user interface. Core functionality of the kiosk remains the same.

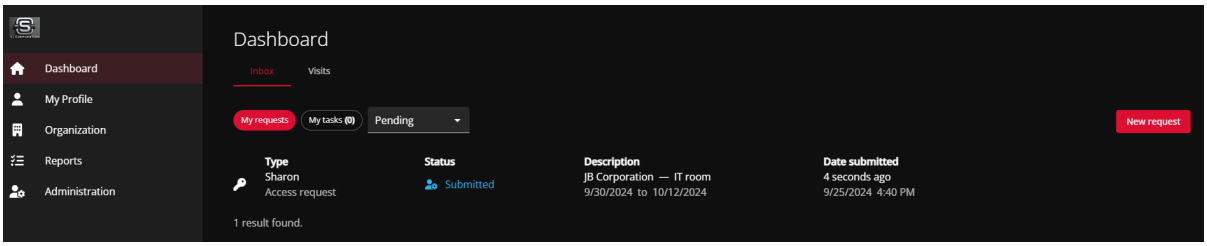
  To download the ClearID Self-Service Kiosk mobile app, visit the App Store.
- **Help menu link customization:** Account administrators can now customize the ClearID Help menu links, directing portal users to your company's support pages and resources.



  For more information, see Customizing help menu links.

What's New: June 2024

- **Portal branding customization:** Account administrators can now customize the ClearID portal logo and accent color to align with your company's branding. Portal users can choose to view the portal in a light or dark theme.



  For more information, see Customizing portal branding on page 37.
- **Geo-specific data centers:** You can now store your data in a region that applies to the geographical location of your system or where you want data stored. You can choose between more regional data center options to meet regulatory requirements or other geo-specific data storage needs.
  - **Canadian data centers:** All data is stored in data centers located within Canada.
    - Primary data center: Azure Central Canada (Ontario)
    - Secondary data center: Azure East Canada (Quebec)
  - **Australian data centers:** All data is stored in data centers located within Australia.
    - Primary data center: Azure East Australia (New South Wales)
    - Secondary data center: Azure Central Australia (Canberra)

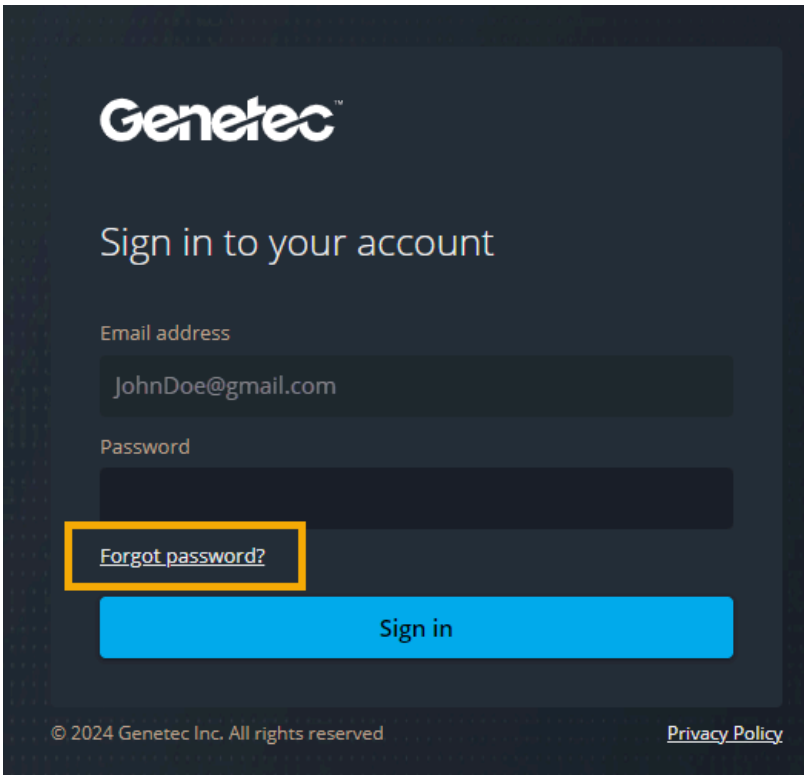
  For more information, see About ClearID architecture on page 5.
- **User activity report:** Account administrators can now review activity related to identities and supervisors in the *User activity* report. It's now possible to filter results in the **Activity type** column to display activities for these action types:
  - Supervisor added or removed
  - Identity created, updated, or deleted

  For more information, see About user activity report and Viewing a user activity report.

What's New: April 2024

- **Updates to the ClearID sign in system:** An update has been made to the ClearID sign in system that might affect your organization. Users who don't use a single sign-on (SSO) integration might need to reset their passwords the first time they sign in to ClearID. As part of the transition:
  - Multifactor authentication (MFA) is mandatory for all users that sign into Genetec™ applications.
  - A code is sent to the email address associated with the user's account to act as a second factor for authentication.

  NOTE: This change doesn't affect users in organizations that integrate their corporate identity system with ClearID. These users can continue to use the SSO functionality that their organization provides.



  For more information, see Resetting user passwords.

What's New: February 2024

- **Tracking entities managed by ClearID in Synergis™:** You can now track entities managed by ClearID in Config Tool and Security Desk. These entities are highlighted with a blue dot in the bottom-right corner of the entity icon. For example:

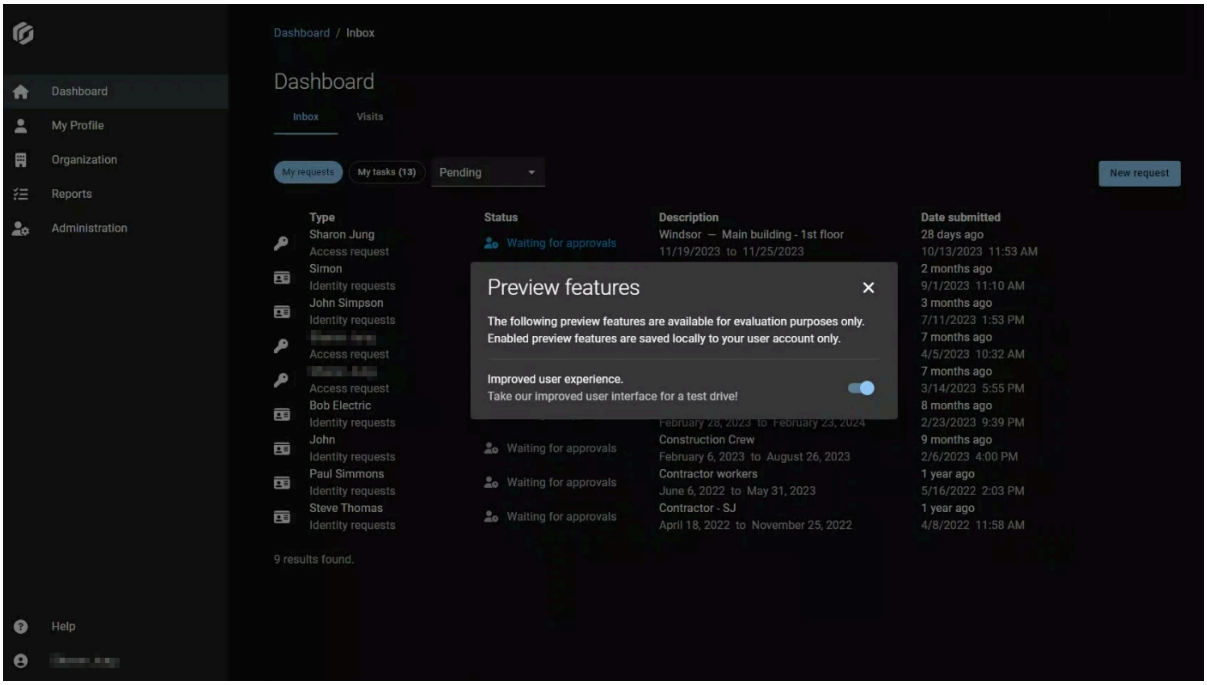
  Access rules ( )

  For more information, see How the integration works on page 13.
- **Zebra DS 9300 QR code scanner support:** ClearID now supports the Zebra DS 9300 QR code scanner.

For more information, see Supported devices on page 77, Enabling visitor management for sites on page 247, or refer to the manufacturer documentation.

What's New: December 2023

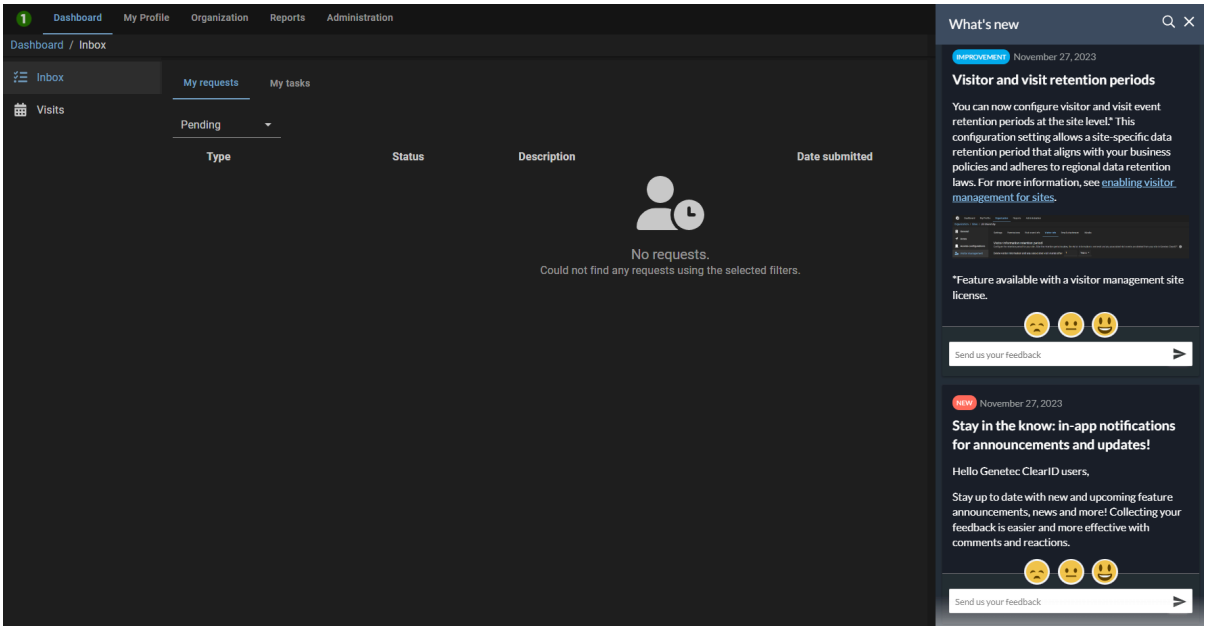
- **Preview features:** ClearID now includes a preview features option. Users can enable one or more preview features (when available) to get early access to new functions before they are released.



NOTE: Preview features are for evaluation purposes only. Enabled preview features are saved locally to your user account only.

For more information, see Enabling preview features on page 35 and Disabling preview features on page 36.

- **In-app notifications:** ClearID now includes in-app notifications for new feature announcements, improvements, surveys, and other product updates in the web portal.



Stay up to date with new and upcoming feature announcements, news, and more. Collecting your feedback is now even easier. You can submit emoji reactions or send feedback for each announcement or notification directly to the product team.

- **ClearID architecture update:** Identity data processing has changed.

  For more information about which data centers are used in the Global deployment, see the *Microsoft Corporation* entry in the ClearID section of the Genetec Subprocessors list.

- **Genetec ClearID™ Self-Service Kiosk 1.13.9:** ClearID Self-Service Kiosk mobile app version 1.13.9 is now available.

  This maintenance update includes the following:

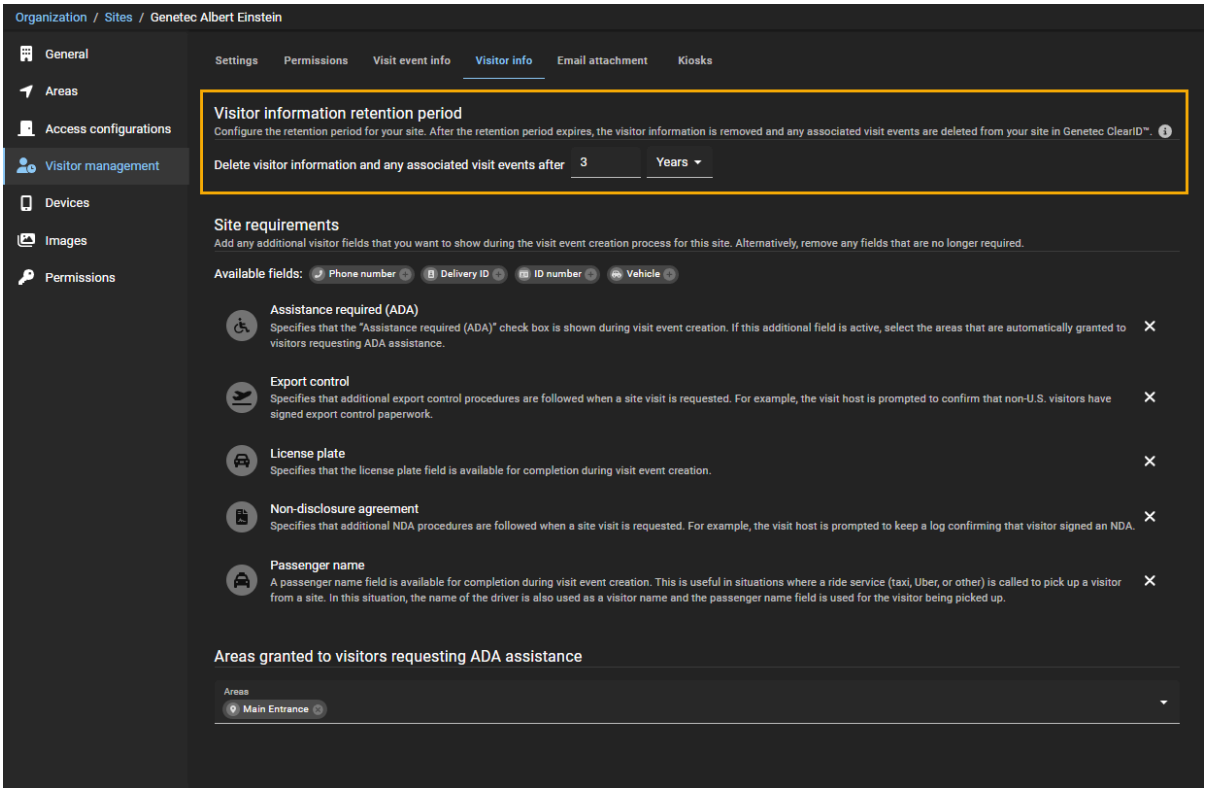
  - Performance improvements
  - iOS 17.1.1 compatibility update

  To download the ClearID Self-Service Kiosk mobile app, visit the App Store.

What's New: November 2023

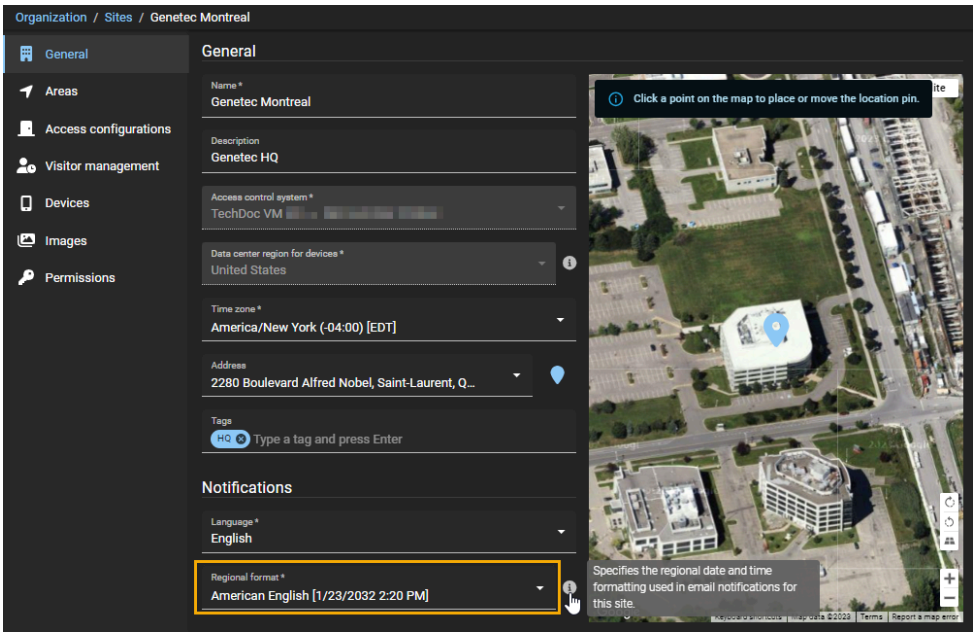
- **Data retention for visitors:** You can now configure a retention period for visitor information. After the retention period expires, the visitor information is removed and any associated visit events are deleted from your site in ClearID.

  NOTE: The retention period is configurable by site to comply with the different data laws that might apply in your region.



For more information, see Enabling visitor management for sites on page 247.

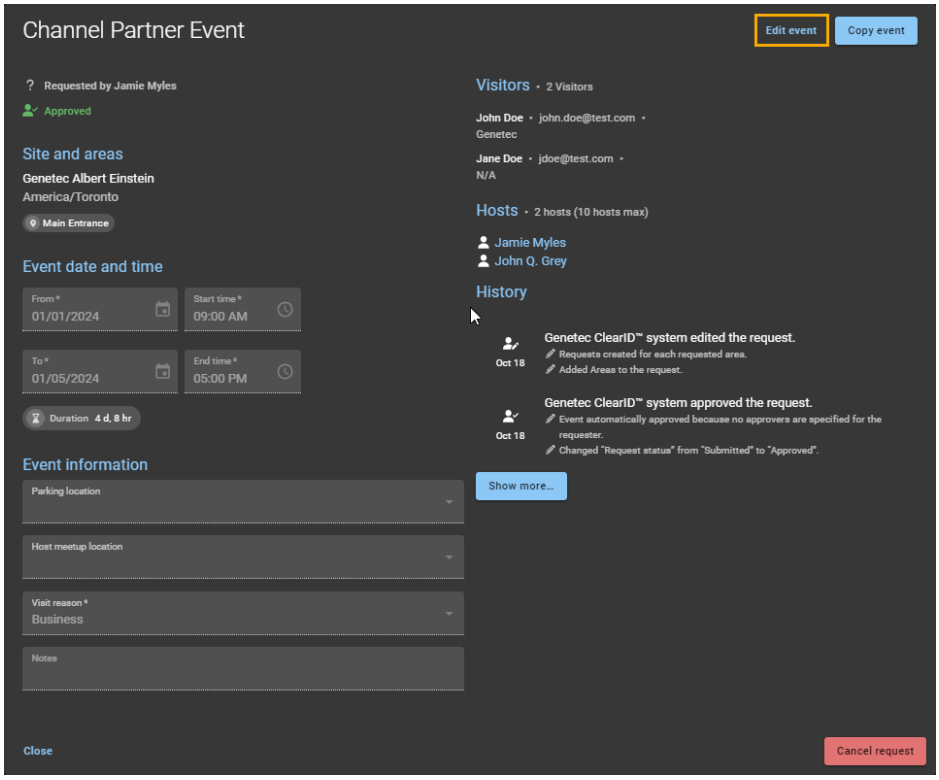
- **Email notifications:** You can now configure your email notifications to specify a **Regional format** that is relevant for your sites. The email notifications display the date and time using the selected regional format that is the local standard in the region where the site is located.



For more information, see Creating sites on page 243 and Modifying sites on page 263.

- **Updating scheduled visit events:** You can now modify visit events to change the event details, or to add or remove visitors or hosts. Updating the visit event details ensures that your visitors are always kept up to date following any changes to an upcoming event.

  NOTE: Events can only be modified before the start of the visit event.

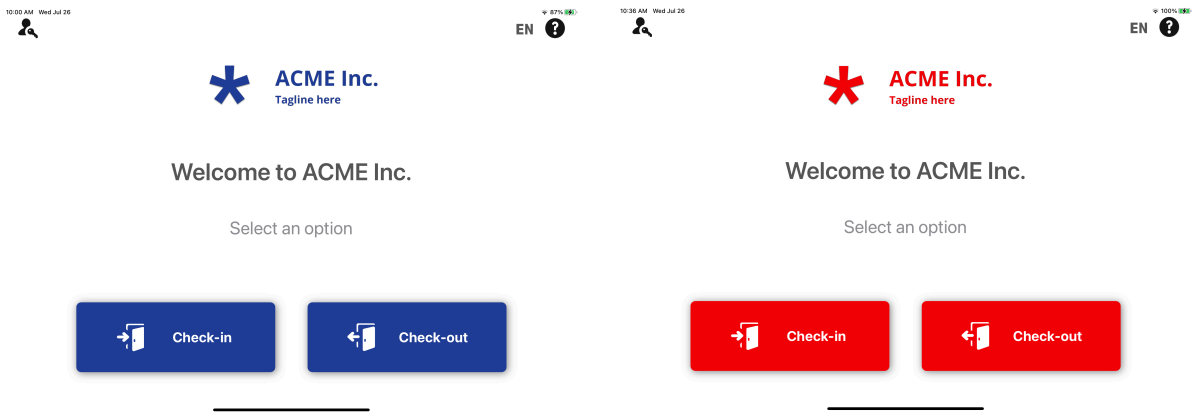


For more information, see Modifying visit events on page 381.

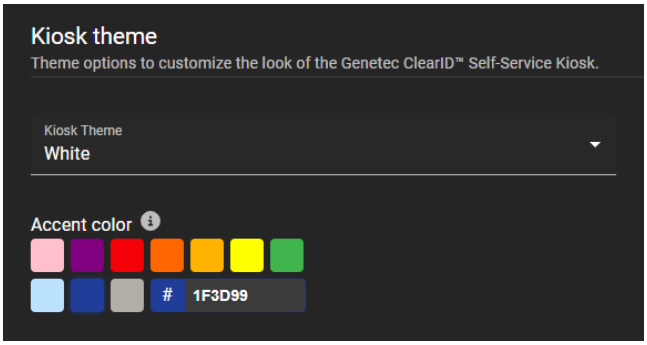
What's New: October 2023

- **Kiosk customization:** The Genetec ClearID™ Self-Service Kiosk has been enhanced to include kiosk theme customization.

  The following examples show the white kiosk theme with an accent color.



  You can choose a white kiosk theme. When you choose the white kiosk theme, you can also choose one of ten accent colors. Alternatively you can enter a specific HEX color code value to align with your corporate branding.



For more information, see Customizing the Self-Service Kiosk configuration on page 567 or Enabling visitor management for sites on page 247.

- **Genetec ClearID Self-Service Kiosk 1.13.8:** ClearID Self-Service Kiosk mobile app version 1.13.8 is now available.

  The Kiosk mobile app now supports the following:

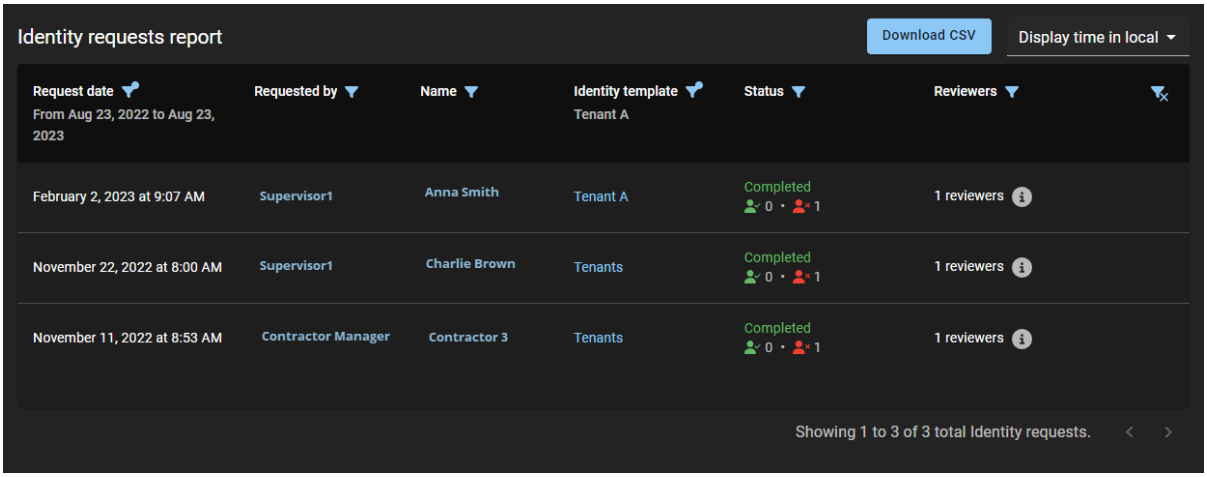
  - Kiosk Theme customization
  - Translation updates for check-in, check-out, and welcome screen or assistance messages.

  For more information, see Customizing the Self-Service Kiosk configuration on page 567 or Enabling visitor management for sites on page 247.

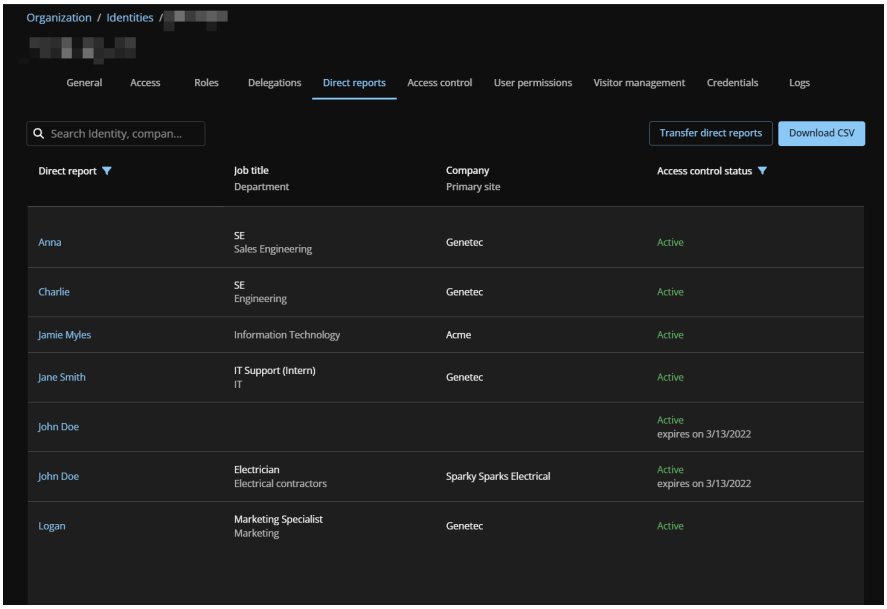
  To download the Genetec ClearID™ Self-Service Kiosk mobile app, visit the App Store.

What's New: August 2023

- **Reports:** ClearID now includes two more reports for audit trail and activity tracking purposes:
  - **Identity requests report:** Account administrators can now use the **Identity requests** report to review all activities related to identity requests.



  For more information, see About reports on page 32, About identity requests report on page 232, and Checking the status of identity requests on page 233.
  - **Direct reports report:** Supervisors or account administrators can now use the **Direct reports** report to check their direct reports access control status and general identity information.



For more information, see About reports on page 32, About direct reports report on page 176, and Viewing direct reports on page 160.

- **Kiosk kit update:** The ClearID Self-Service Kiosk kits now include and support the 10th generation 10.9 inch Apple iPad.

  For more information, see Self-Service Kiosk options on page 615 and Supported devices on page 77.

What's New: July 2023

- **One Identity Synchronization Tool:** The Genetec ClearID™ One Identity Synchronization Tool has been updated to simplify synchronization and also to resolve the End of Life (EOL) of the Microsoft Azure AD Graph.

  IMPORTANT: The Microsoft Graph library replaces the now End of Life (EOL) Azure Active Directory Graph library (EOL since **June 30, 2023** - Azure AD Graph API end of life). The new library supports all previous mappings.
  Who is affected? ClearID customers who are using **Azure AD** as the data source to synchronize their identities in ClearID with the One Identity Synchronization Tool.

  For more information, see the official documentation from Microsoft: Migrate your apps from Azure AD Graph to Microsoft Graph.

  Next steps? Get in touch with your ClearID team deployment contact to upgrade the One Identity

  Synchronization Tool.

  NOTE: If you are not using Azure AD as a data source, these events do not affect you and you do not require an upgrade.
  For more information about the synchronization tool, see Synchronizing identities using One Identity on page 502.

  For more information about Azure AD API permissions, see About the Azure web app on page 508.

What's New: June 2023

- **Genetec ClearID Self-Service Kiosk 1.13.7:** ClearID Self-Service Kiosk mobile app version 1.13.7 is now available.

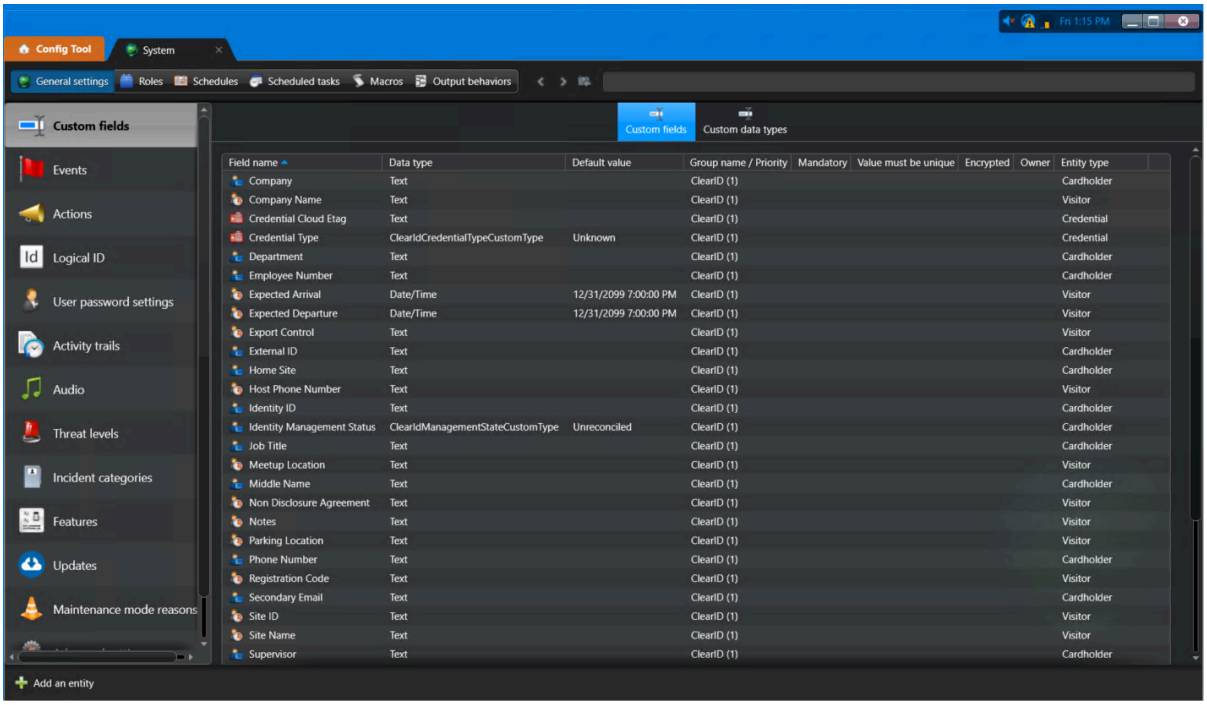
The Kiosk mobile app now supports the following:

- Brother QL-820NWBc label printer
- iOS 16
- 135 new or updated Identity Document (ID) types

For more information, see Supported devices on page 77, Self-Service Kiosk options on page 615, Configuring the Self-Service Kiosk label printer (Brother QL-820NWBc, QL-820NWB, or QL-810W) on page 584, and Identity document types on page 626.
To download the Genetec ClearID™ Self-Service Kiosk mobile app, visit the App Store.

What's New: May 2023

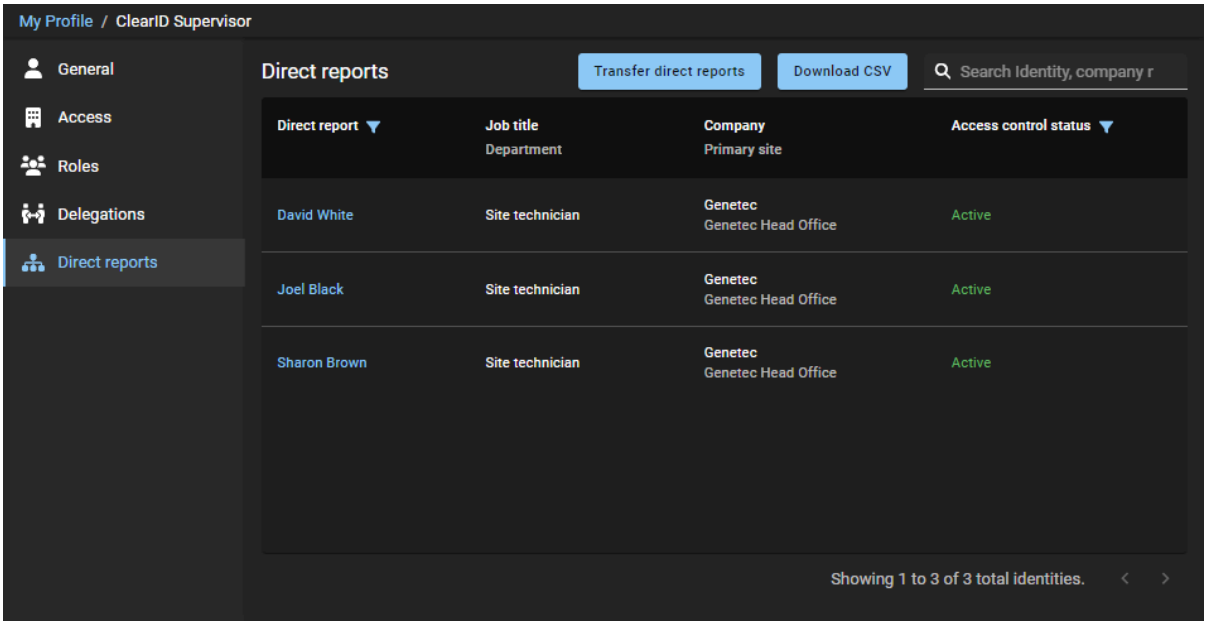
- **Custom fields updates:** ClearID custom fields information has been updated to help you understand the relationship between ClearID identity field names and Security Center entity type fields.



For more information, see About custom fields on page 101, Modifying custom fields on page 102, and Custom fields relationships on page 105.

What's New: March 2023

- **Transfer direct reports:** Supervisors, account administrators, or an identity with write permissions for identities can now transfer direct reports to another identity.



IMPORTANT: This function is intended for identities that are locally managed in ClearID. If identities are managed using an external data source, the transfer of direct reports will be overwritten.
For more information, see Transferring direct reports.

- **Synergis™ licensing changes:** Synergis licensing has changed. For Security Center 5.11 or later (Synergis Base Enterprise or Synergis Base Professional) the Synergis visitor management module is now included by default.

  NOTE: The Synergis visitor management module is required if the ClearID customer has the CD-SITE-VM-1Y ClearID license.
  For more information, see License options on page 70.

What's New: February 2023

- **Genetec ClearID Self-Service Kiosk 1.13.6:** Genetec ClearID Self-Service Kiosk mobile app version 1.13.6 is now available.

  The Genetec ClearID Self-Service Kiosk mobile app version 1.13.6 now supports the following:

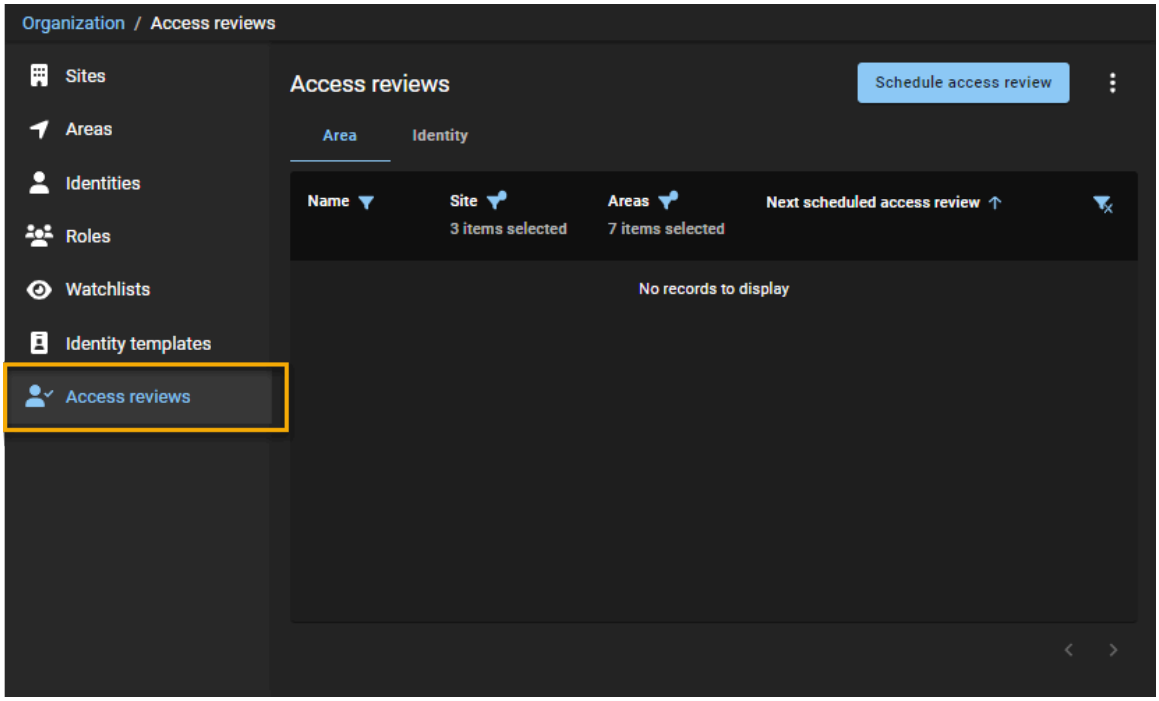
  - Brother TD-4550DNWB thermal printer (with pre-cut labels).

  For more information, see Supported devices on page 77, Self-Service Kiosk options on page 615,

  and Configuring the Self-Service Kiosk label printer (Brother TD-4550DNWB) on page 593.
  To download the Genetec ClearID™ Self-Service Kiosk mobile app, visit the App Store.

IMPORTANT: User interface changes

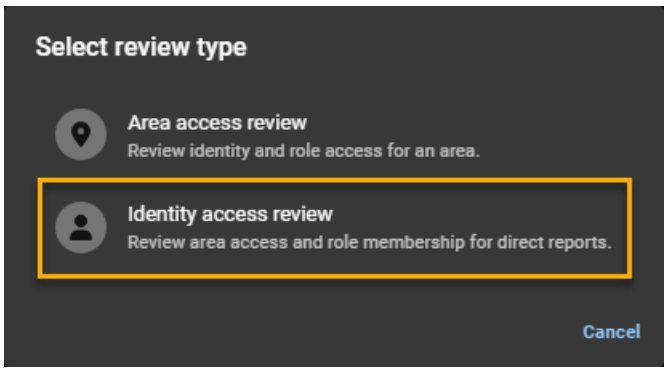
- **Access reviews have moved:** Previously access reviews were created and scheduled at a site level by clicking **Organization** > **Sites** > **Access reviews**. Access reviews settings are now configured at a global level by clicking **Organization** > **Access reviews**.



Access reviews enhancements

- **Access reviews:** Access reviews now include a new *Identity access review* option.

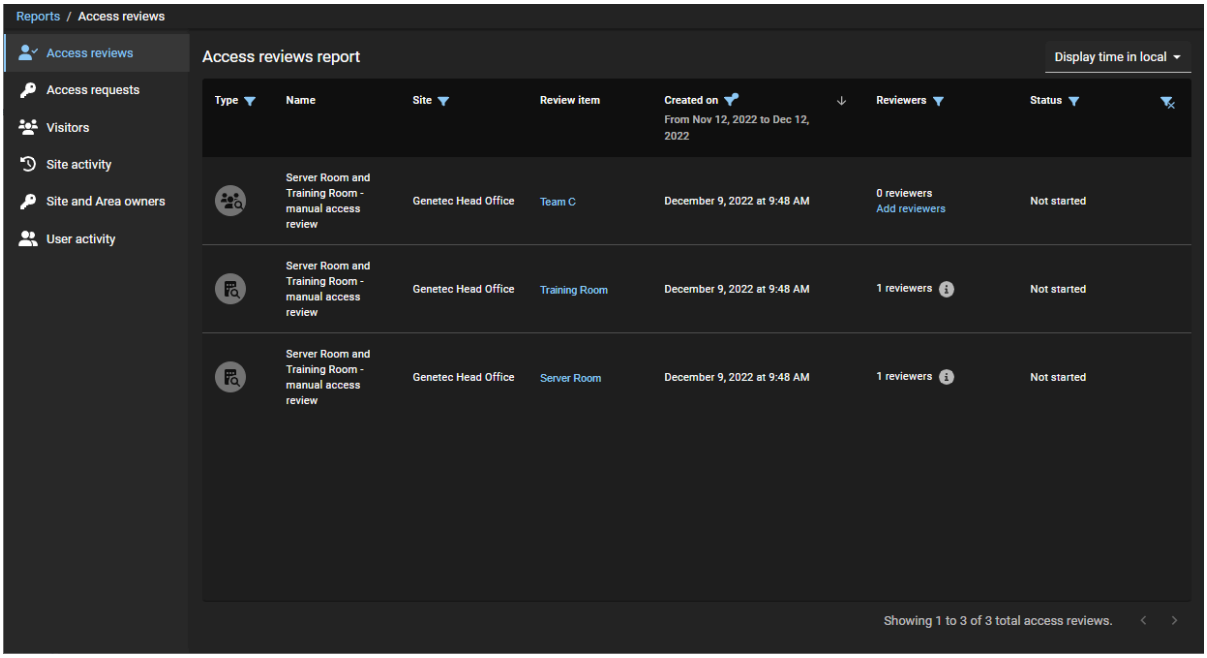
  An identity access review is the process where a supervisor reviews their direct reports access. This review includes confirming or updating area access, access control date range, or role membership for their direct reports to ensure security compliance and audit readiness.



  Access reviews also include updates to the **Site access review schedule** dialog.

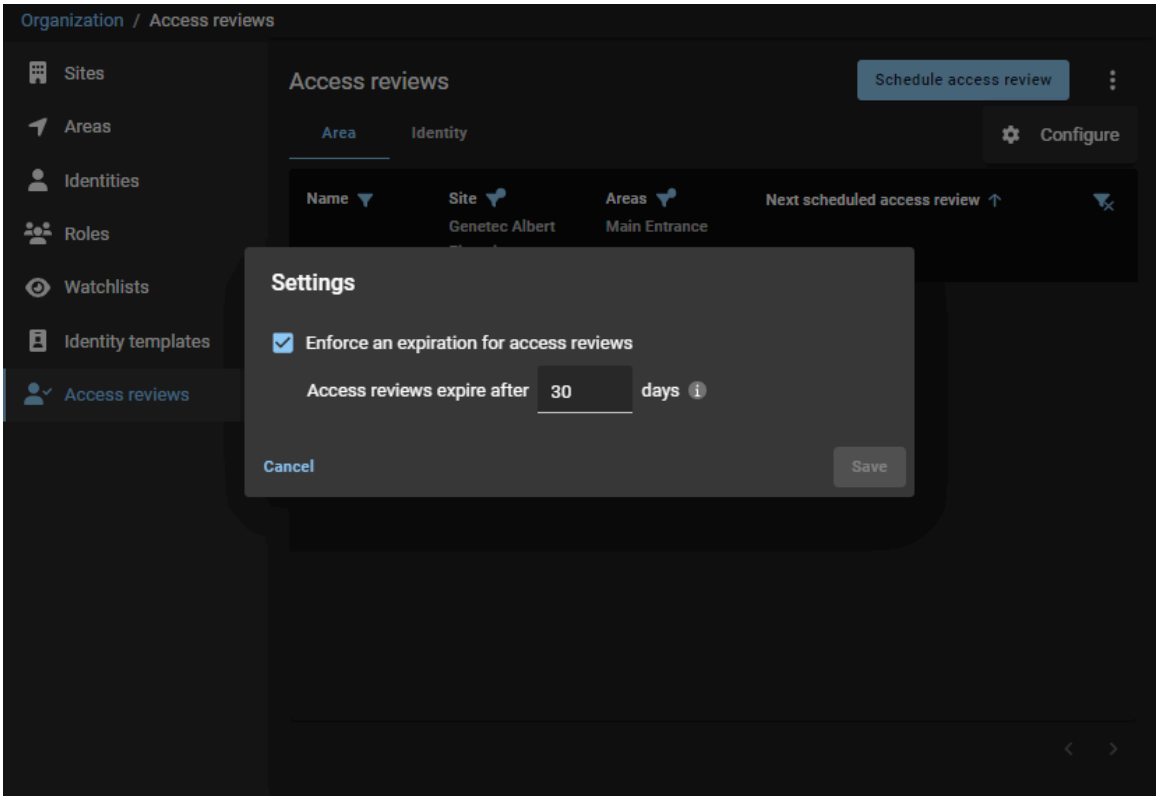
  For more information, see Setting up area access reviews on page 277 and Setting up identity access reviews on page 283.

- **Access reviews report updates:** Access reviews report now includes updates to report data and filtering.



For more information, see About access reviews report on page 288 and Checking the status of access reviews on page 289.

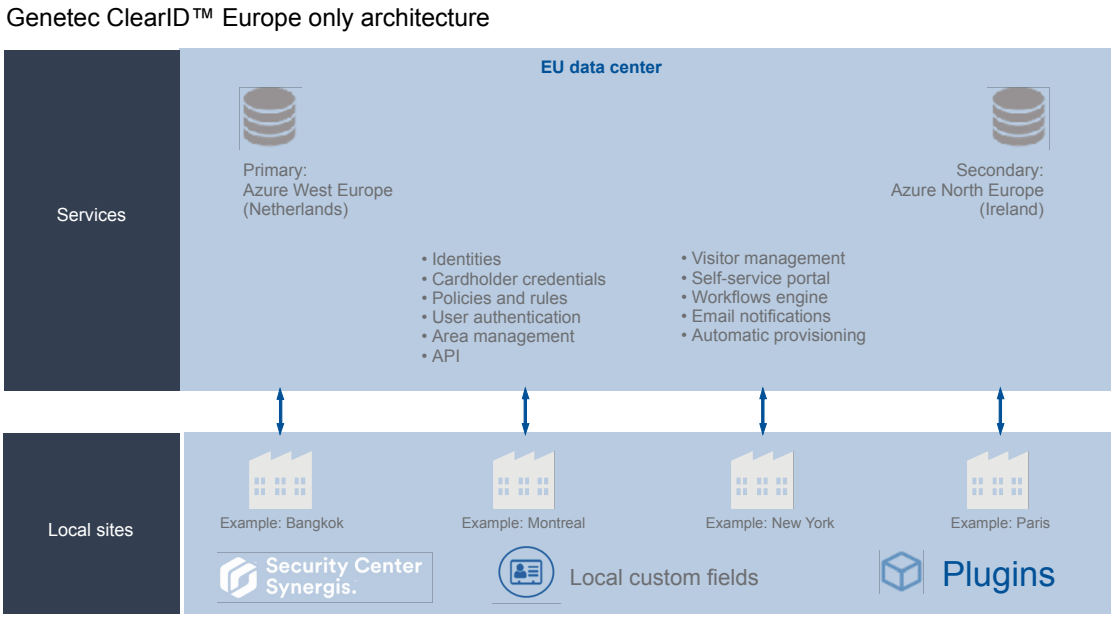
- **Automatic expiration for access reviews:** Account administrators can now set an automatic expiration period for all access reviews.



For more information, see Setting up automatic expiration for access reviews on page 275.

What's New: January 2023

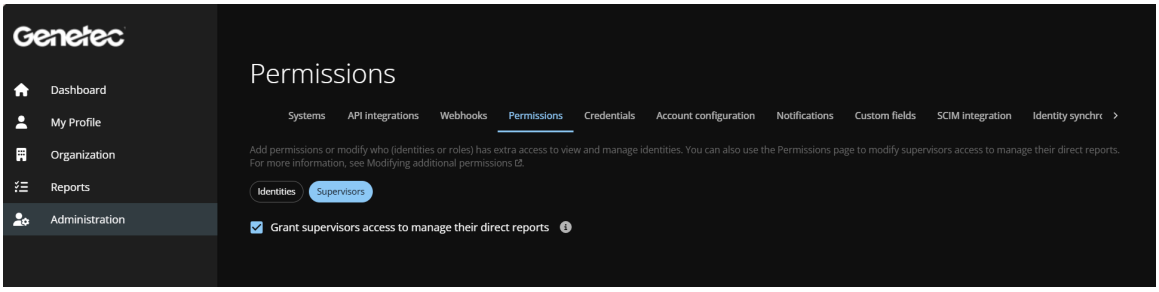
- **Europe only architecture (NOW AVAILABLE):** ClearID now includes a Europe only solution for customers who require all their data to be stored in Europe.



For more information, see About ClearID architecture on page 5.

What's New: November 2022

- **Supervisor permissions enhanced:** Administrators can now grant supervisors more control to manage their direct reports. Supervisors can now modify **General** identity information fields and **Access control** settings.



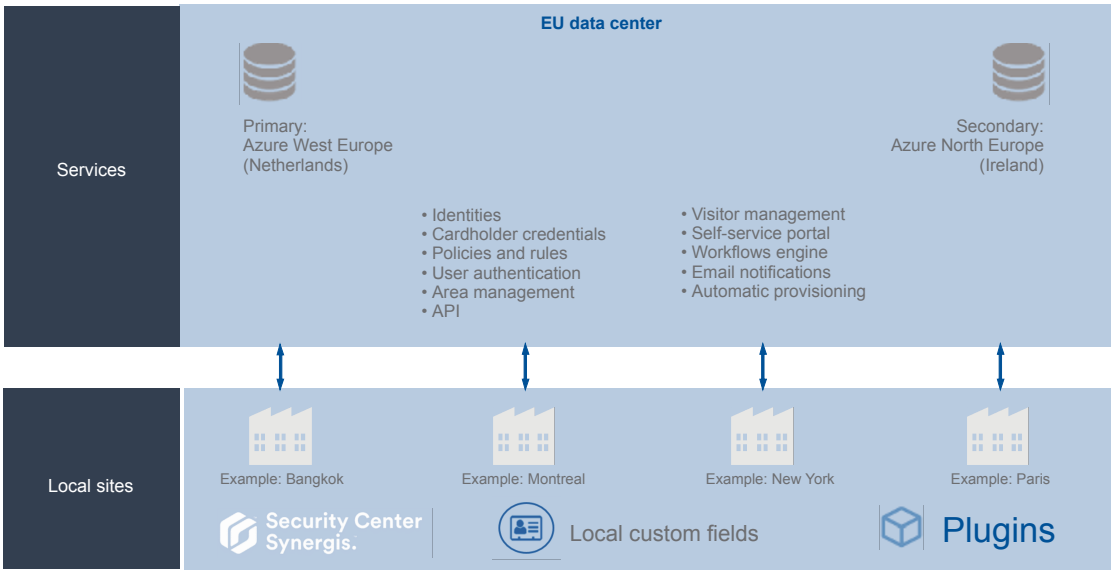
This option is useful for any organization that wants to decentralize some administration functions by allowing supervisors to manage their direct reports.

For more information, see Managing direct reports on page 163.

What's New: Coming soon

- **Europe only architecture (coming soon):** ClearID now includes a Europe only solution for customers who require all their data to be stored in Europe.

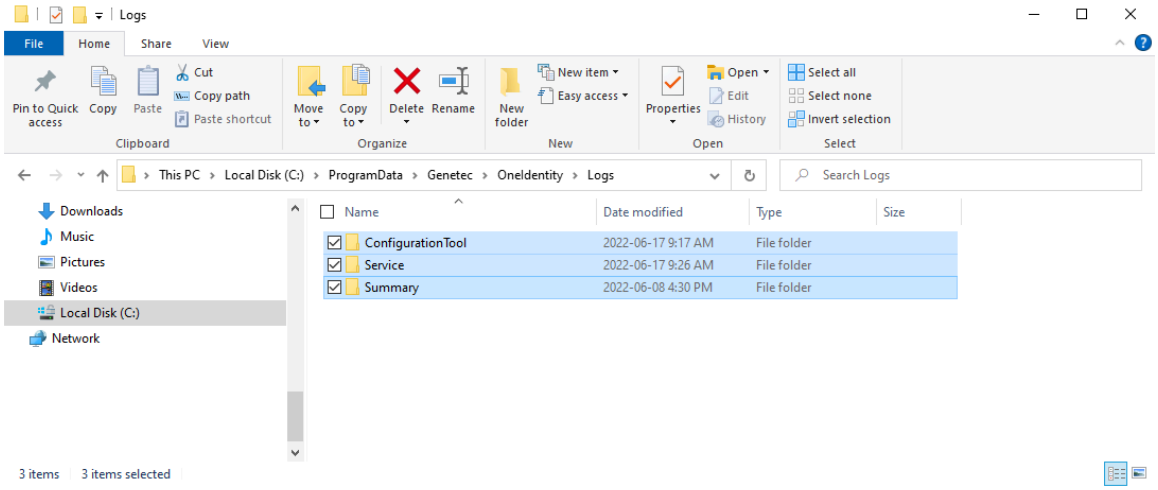
Genetec ClearID™ Europe only architecture



For more information, see About ClearID architecture on page 5.

What's New: September 2022

- **Genetec ClearID One Identity Synchronization Tool:** The Genetec ClearID One Identity Synchronization Tool has been updated and now supports the following:
  - **Improved logging:** Summary logs identify any issues that might occur during synchronization. Read the *Recap.txt* file in the *Summary* logs folder for a quick synchronization overview.

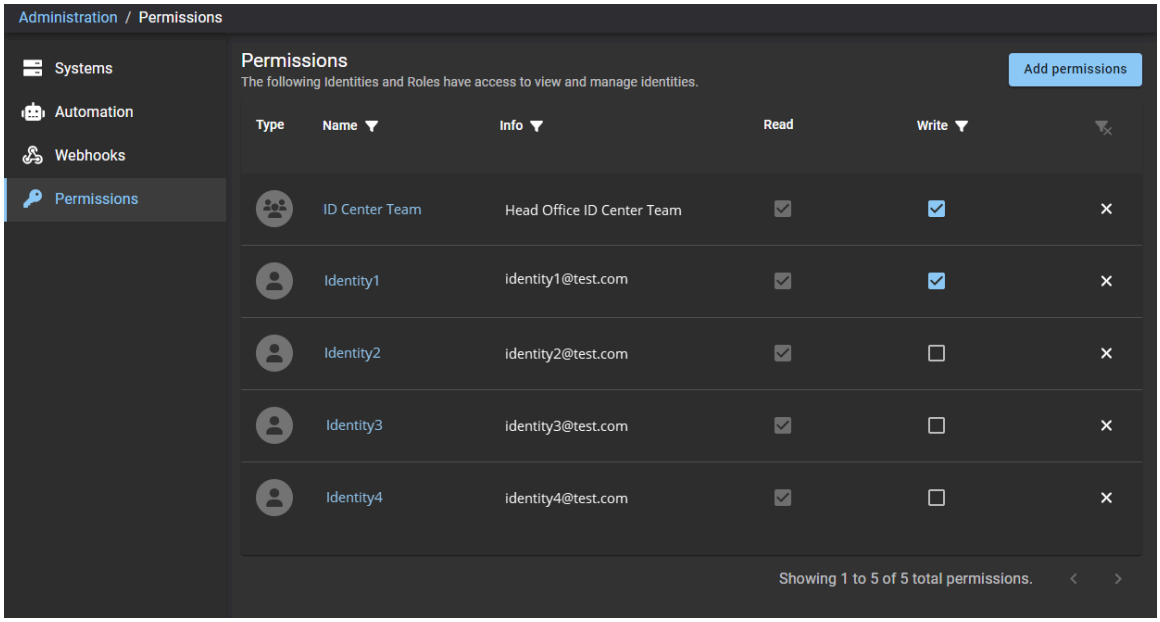


    For more information, see Viewing One Identity Synchronization Tool logs on page 549.
  - **Microsoft Graph library replaces Azure Active Directory Graph library:** The Microsoft Graph library replaces the now deprecated Azure Active Directory Graph library. The new library supports all previous mappings.
    For more information, see About the Azure web app on page 508.

For more information about the synchronization tool, see Synchronizing identities using One Identity on page 502.

What's New: August 2022

- **Identity permissions:** Account administrators can now add extra permissions to identities or roles so that the users can view or manage identities.



  For more information, see Granting additional permissions.

What's New: July 2022

- **Genetec ClearID Self-Service Kiosk 1.13.3:** Genetec ClearID Self-Service Kiosk mobile app version 1.13.3 is now available.

  The Genetec ClearID Self-Service Kiosk mobile app version 1.13.3 now supports the following Identity Document (ID) types:

  - UAE - Driving License
  - UAE - ID card
  - UAE - Resident ID

  For more information, see Identity document types on page 626.

  To download the Genetec ClearID™ Self-Service Kiosk mobile app, visit the App Store.

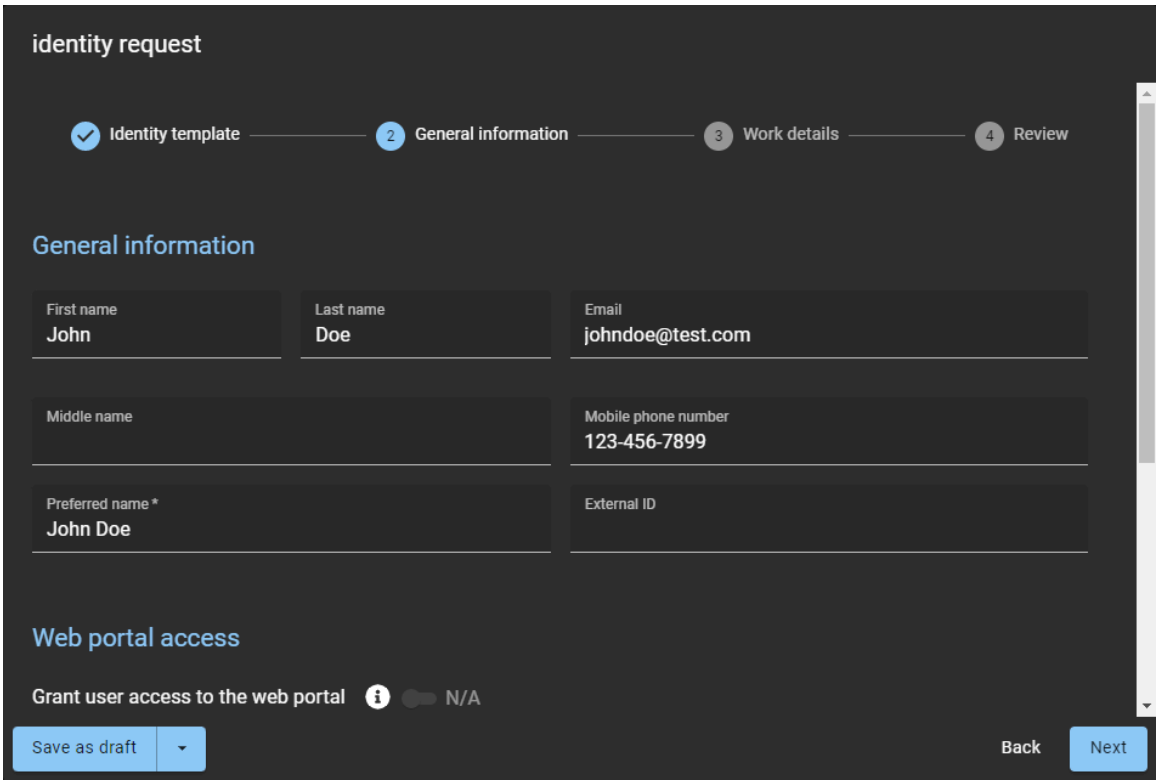
What's New: May 2022

- **ClearID best practices:** ClearID User Guide now includes best practices information for the following:
  - Setting up ClearID for a new Synergis system.
  - Setting up ClearID with an existing Synergis system.

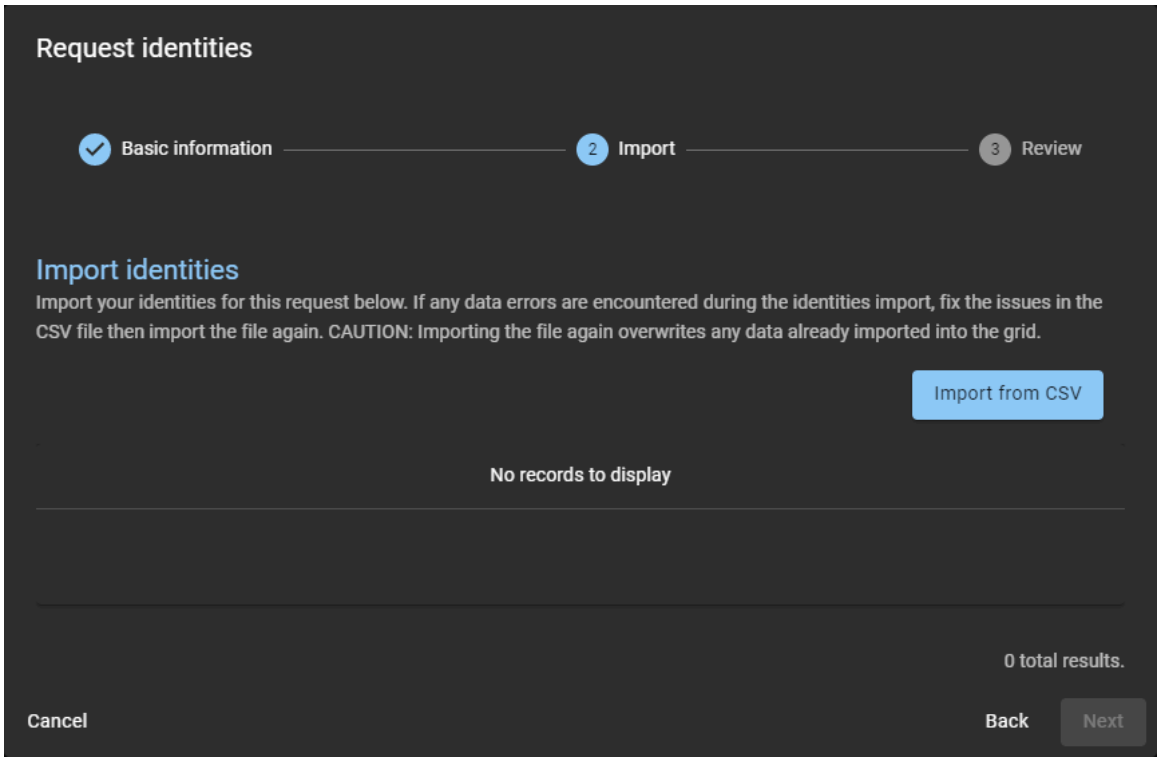
  You can use the best practices to help plan your ClearID system deployments.

  For more information, see Best practices on page 80.
- **Requesting identities:** An identity request wizard is now available to submit either an individual identity request or multiple identities request (CSV import) for different types of employees or contractors. Individual identity requests or multiple identities requests can be repeated using a template for specific employees who require the same access to a specific site, area, or building.

The following example shows an individual identity request:



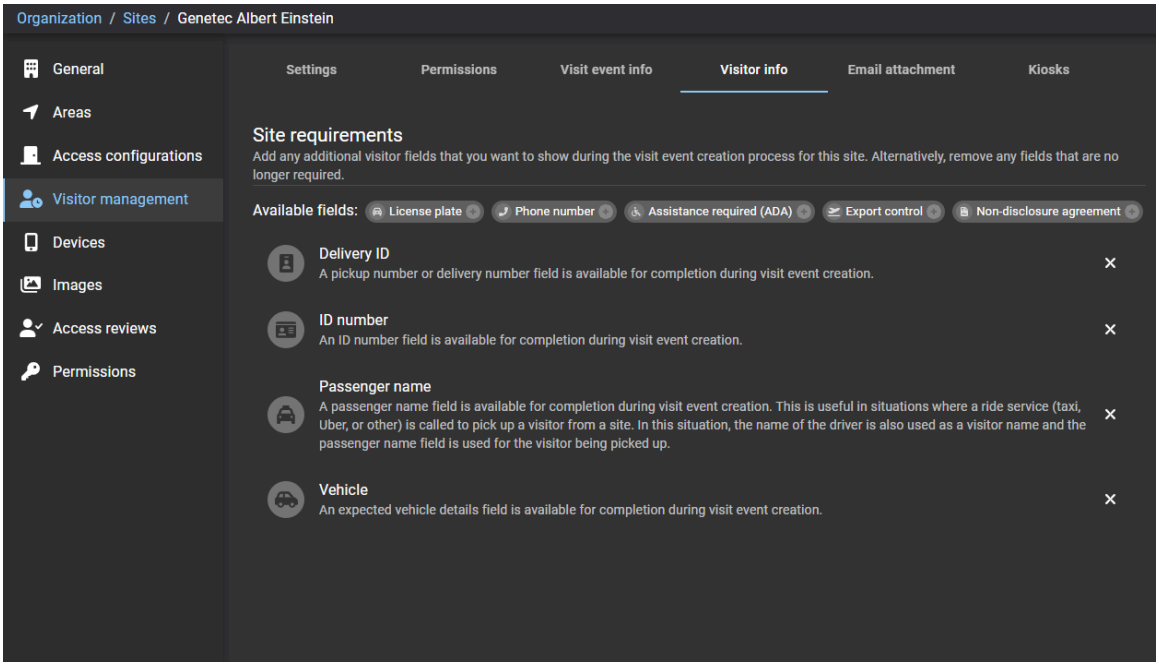
The following example shows an identities request (CSV import):



For more information, see About workflows on page 12, Creating an identity template on page 202,

Requesting an identity on page 210, and Requesting multiple identities using a CSV import on page 214.

- **Visitor management enhancements:** Visitor management for sites now includes more optional visitor information fields for the following:
  - Delivery ID
  - ID number
  - Passenger name
  - Vehicle



For more information, see the **Visitor info** tab in Enabling visitor management for sites on page 247.

What's New: March 2022

- **Genetec ClearID Self-Service Kiosk 1.13.1:** Genetec ClearID Self-Service Kiosk mobile app version 1.13.1 is now available.

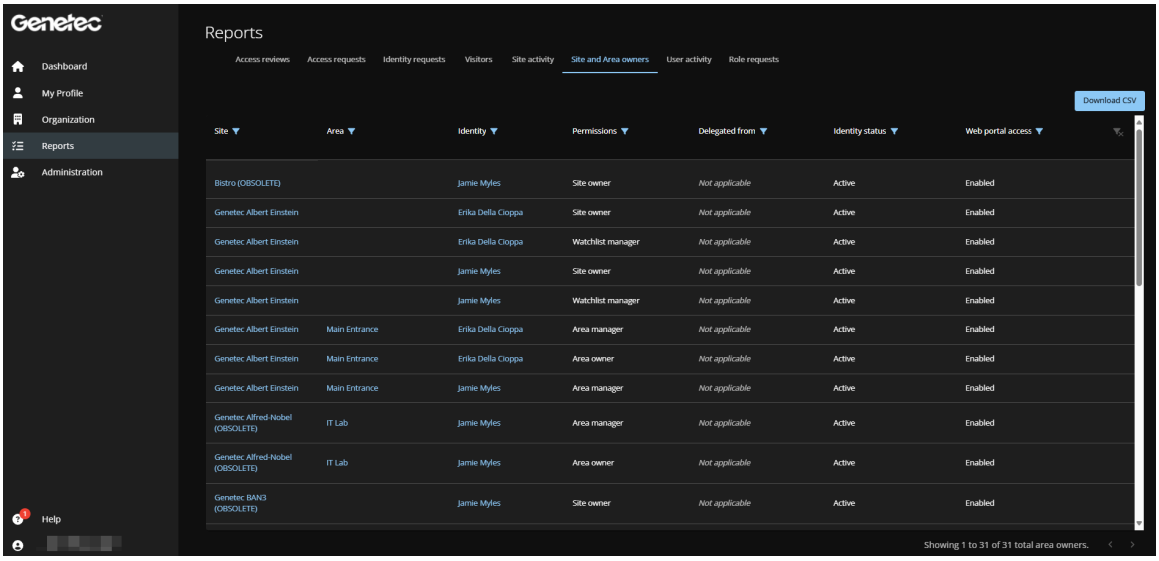
  The ClearID Self-Service Kiosk mobile app version 1.13.1 now supports 78 additional Identity Document (ID) types and includes some additional countries.

  For more information, see Identity document types on page 626.

  To download the Genetec ClearID™ Self-Service Kiosk mobile app, visit the App Store.

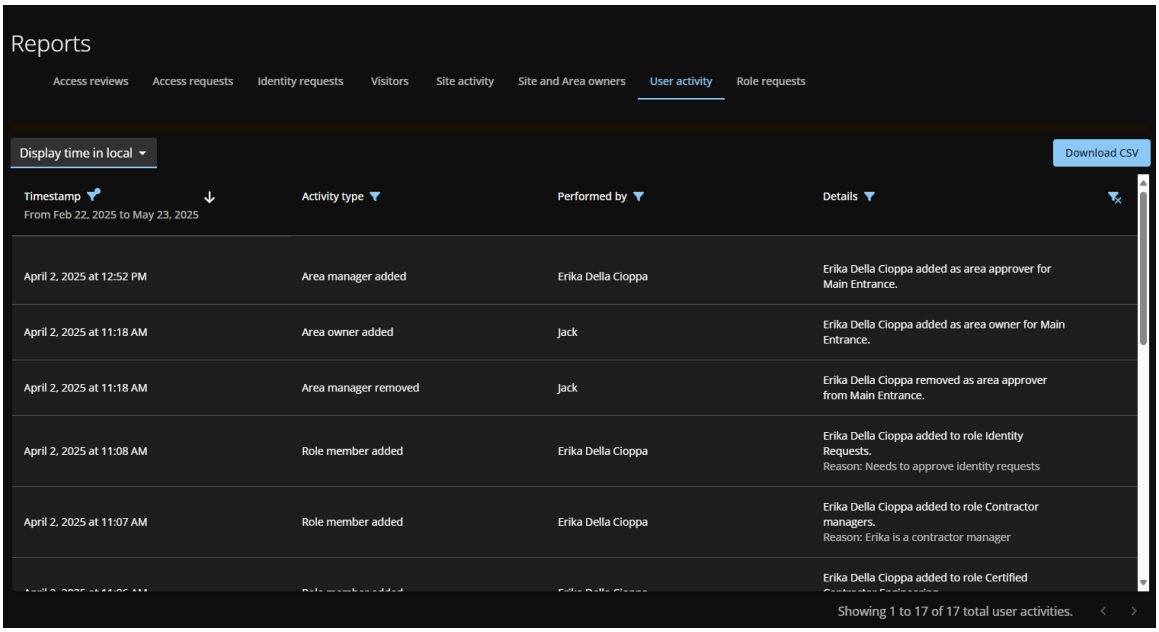
What's New: January 2022

- **Reports:** ClearID now provides three more reports for audit trail and activity tracking purposes:
  - **Site and area owners report:** Account Administrators can now use the **Site and area owners** report to get a global view of all identities and their permissions. When the report is used by a site owner, only information about their own sites is shown.



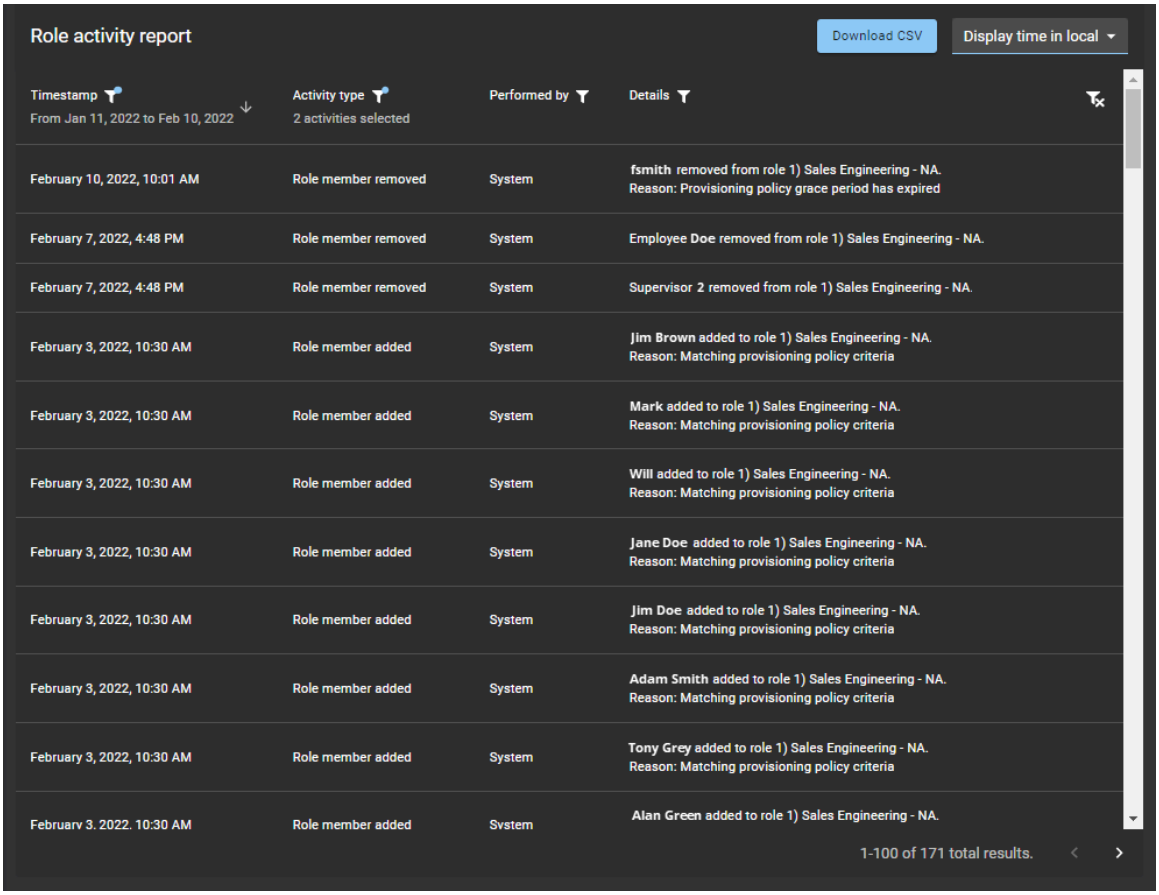
For more information, see About reports on page 32 and Viewing a site and area owners report on page 327.

- **User activity report:** Account administrators can now use the **User activity** report to review all activities related to users.



For more information, see About reports on page 32 and Viewing a user activity report on page 193.

- **Role activity report:** Account administrators can now use the **Role activity** report to review all activities related to roles. When the report is used by role managers or role owners, only the activity for their roles is shown.



For more information, see About reports on page 32 and Viewing a role activity report on page 475.

ClearID plugin

The ClearID plugin is a new integration for Security Center 5.7 SR6 or later.

3

Deployment preparation

Check your compatibility and deployment requirements.

This section includes the following topics:

License options

Use the following information to understand the licenses that are available for Genetec ClearID™ or the Genetec ClearID™ Self-Service Kiosk. To update your license, contact us and provide the part numbers listed in this topic.

ClearID license options

Part number	Description	Requirements
CD-STANDARD-1Y	One ClearID identity subscription for one site for one year - less than 1,000 identities.	This part is mandatory to use ClearID.
CD-SITE-1Y	One ClearID site subscription for one site for one year. This subscription includes auto provisioning, self-service portal, and area and group owner assignment.	It is mandatory to have at least one site subscription to use ClearID.
CD-SITE-VM-1Y	One ClearID site subscription for one site for one year. This subscription includes auto provisioning, self-service portal, area and group owner assignment, visitor management, and watchlists (internal visitor screening only). **NOTE:** This part number is only for use with the visitor management module options.	It is mandatory to have at least one site subscription to use ClearID.
CD-SITE-VM-XTRA-VISITS-1Y (Optional)	The extra visits license provides 50,000 additional visits to the CD-SITE-VM-1Y visitor management site license for one year.	
CD-IDSYNC-SERVICE-1Y (Optional)	Subscription service that synchronizes Identities from an external data source: Active Directory (AD), file (CSV), Database (Microsoft SQL Server, Oracle Database, or ODBC), Microsoft Entra ID, or custom API for one year.	**IMPORTANT:** Use CD-IDSYNC-SERVICE-1Y when you have an external data source to synchronize.
CD-KIOSK-LIC-1Y	Annual subscription license for one kiosk (Volume pricing available for ten kiosks or more)	This license is used in association with various Self-Service Kiosk hardware options.

NOTE: Term subscription part numbers also available for three and five years. Volume pricing is also available.

Synergis license options

To synchronize data between ClearID and Synergis™, one of the following part numbers is required:

NOTE: The following Synergis license options all include the CD-SC-PLUGIN by default. This package provides a license for one connection to ClearID cloud services. You need one license per Directory.

Part number	Description	Requirements
GSC-BASE-E **5.11 or later**	The Synergis Base Enterprise package. **NOTE:** The base package includes the Synergis visitor management module by default.	
GSC-BASE-P **5.11 or later**	The Synergis Base Professional package. **NOTE:** The base package includes the Synergis visitor management module by default.	
GSC-Sy-E **Versions earlier than 5.11**	The Synergis Enterprise package provides a license for the following: • Access Manager support • Remote Security Desk • Badge designer	For more information, see the following visitor management section.
GSC-Sy-P **Versions earlier than 5.11**	The Synergis Professional package provides a license for the following: • Two Access Managers • 256 readers maximum • Ten clients maximum • Remote Security Desk • Badge designer	For more information, see the following visitor management section.
SCS-Base	Security Center SaaS Edition (Classic) - Base Package **NOTE:** The base package includes the Synergis visitor management module by default.	

Visitor management license options

IMPORTANT: If either GSC-Sy-E or GSC-Sy-P is used, then one of the following Synergis part numbers for visitor management is required:

Part number	Description	Requirements
GSC-Sy-E-Vis **Versions earlier than 5.11**	This package provides one license for the *visitor management* module.	Synergis Enterprise is mandatory if you have the visitor management module enabled.
GSC-Sy-P-Vis **Versions earlier than 5.11**	This package provides one license for the visitor management module.	Synergis Professional is mandatory if you have the visitor management module enabled.

NOTE: For sites with visitor management, license can include kiosk hardware and kiosk license.
For the latest updated prices, see Genetec Parts Manager or contact Channel sales.

Does your Security Center license include all the options you need?

In addition to a certificate for your plugin, ensure that your Security Center license includes all the options you expect to use in Security Center. For example, if you integrated a system that has visitors, you need the Visitors option in Security Center. If an option is missing, an error message is displayed when the server tries to create or modify the entity related to that option.

For a list of available license options, see "License options" in the *Security Center Administrator Guide*.

Related Topics

Integration overview on page 15

Compatibility

The Genetec ClearID™ web portal and the ClearID plugin are compatible with Security Center 5.11 or later.

The web portal and plugin support Security Center versions for a maximum of 3 years after the first GA release date.

Supported Security Center versions

Use the following information to help you understand when each Security Center version will no longer be supported for use with ClearID:

Security Center version	Security Center first GA release date	Security Center end of support in ClearID
5.11	September 2022	September 2025
5.12	December 2023	December 2026
5.13	December 2024	December 2027

IMPORTANT: You must have Synergis™ Professional or Enterprise to use ClearID. For more information, see License options on page 70.

System requirements

For the Genetec ClearID™ system to run efficiently in your web browser, the computer or mobile device that you use must meet certain software and hardware requirements.

The requirements for ClearID web application are as follows:

Desktop requirements

- Cookies and JavaScript are enabled in your web browser.

The ClearID web application is compatible with the following web browsers:

- Google Chrome (latest version)
- Microsoft® Edge (latest version)

ClearID plugin requirements

The following system requirements must be met to run the ClearID plugin:

Synergis Professional or Omnicast Professional is required for plugins support in Security Center.

Hardware

The ClearID plugin must be installed on a server that meets the recommended specifications, as described in the Security Center system requirements.

Networking

The server that the plugin is installed on requires internet access to communicate between Synergis™ and ClearID cloud services. All communications use TCP port 443.

IMPORTANT: All data uploaded to the ClearID web application remains encrypted in transit and at rest.

Firewall ports

To ensure that Genetec ClearID™ works as designed, the following ports, URLs, and network requirements must be met.

ClearID web portal

The following network configuration is required for the web portal:

- TCP Port 443 outbound
- **.clearid.io* - Allow all outbound traffic for this domain
- **.core.windows.net* - Allow all outbound traffic for this domain
- **.launchdarkly.com* - Allow all outbound traffic for this domain

ClearID plugin

The following network configuration is required for the plugin:

- TCP Port 443 outbound
- **.clearid.io* - Allow all outbound traffic for this domain
- **.servicebus.windows.net* - Allow all outbound traffic for this domain
- **.core.windows.net* - Allow all outbound traffic for this domain

NOTE: The server that the plugin is installed on requires internet access to communicate between Synergis™ and ClearID cloud services.

Genetec ClearID™ One Identity Synchronization Tool

The following network configuration is required for the One Identity Synchronization Tool:

- TCP Port 443 outbound
- **.clearid.io* - Allow all outbound traffic for this domain

Genetec ClearID™ LDAP Synchronization Agent

The following network configuration is required for the LDAP Synchronization Agent:

- TCP Port 443 outbound
- **.clearid.io* - Allow all outbound traffic for this domain

Genetec ClearID™ Self-Service Kiosk

The following features or network configuration are required for the Self-Service Kiosk:

- TCP Port 443 outbound
- **.clearid.io* - Allow all outbound traffic for this domain
- Label Printer **(Wi-Fi mode only)** Bonjour - used for device search
- Label Printer **(Wi-Fi mode only)** SNMP - used for checking printer status information
- Label Printer **(Wi-Fi mode only)** UDP or TCP Port 9100 - used for sending print data

Other requirements

The following resources are used by ClearID to enhance the user experience, but they are not mandatory.

Google Maps:

- https://www.google.com/

- https://maps.googleapis.com
- https://fonts.googleapis.com/
- https://maps.gstatic.com/

Microsoft Application Insights:

- https://dc.services.visualstudio.com/
- https://dc.applicationinsights.azure.com/
- https://dc.applicationinsights.microsoft.com/

NOTE: These resources do not prevent you from using the ClearID portal, but some elements of the user interface might not format correctly unless these resources are available.

Supported devices

To help you understand the hardware devices that are supported for use with Genetec ClearID™ or the Genetec ClearID™ Self-Service Kiosk, use this supported devices list.

For each device, the corresponding firmware and certification level is listed.

- **Certified:** Genetec Inc. has tested and validated the device.
- **Supported by design:** The device has the same design characteristics as a certified device, but Genetec Inc. has not tested or validated the device.

Kiosk devices

The following iPad devices are supported for use with the ClearID Self-Service Kiosk.

Manufacturer	Model	Device type	Version
Apple	Not applicable	• iPad 10.9 inches[1] • iPad 10.2 inches[2]	**Certified:** iOS 16.1 or later

NOTE:

- [1] Other iPad devices might also be supported (without kiosk stand) if they are running the Minimum iOS version required for the Kiosk mobile app. For example, the iPad Pro could be used. However, due to the iPad Pro physical dimensions it is not compatible with the Kiosk stand. For information about iPad power adapter requirements, see Self-Service Kiosk options on page 615.
- [2] You can no longer purchase the 10.2 inch iPad or the associated kiosk stand enclosure from us.

Kiosk label printer

The following label printer devices are supported for use with the ClearID Self-Service Kiosk.

Manufacturer	Model	Device type	Version
Brother	QL-820NWBc (Network, Wi-Fi, Bluetooth) **NOTE:** Only DK-2205 or DK2251 (62mm Black or Red and Black) labels are supported for this printer.	Thermal Label Printer	**Supported by design**
Brother	QL-820NWB (Network, Wi-Fi, Bluetooth)	Thermal Label Printer	**Supported by design (DEPRECATED)** **NOTE:** The QL-820NWBc replaces the discontinued QL-820NWB printer.
Brother	QL-810W (Wi-Fi only)	Thermal Label Printer	**Supported by design**
Brother	TD-4550DNWB	Thermal Label Printer	**Supported by design**

Manufacturer	Model	Device type	Version
	(Network, Wi-Fi, Bluetooth) **NOTE:** Only RD001U1S (57mm Black) labels are supported for this printer.		

QR code (2d barcode reader) devices

The following devices are supported for use with ClearID when using QR codes as a credential for visitors.

Manufacturer	Series	Model	Device type	Version
IBC	Qscan	Qscan (for parking lots)	Barcode scanner	**Supported by design:** Firmware qswie26m.bin
IBC	Qscan	QscanT (for turnstiles)	Barcode scanner	**Supported by design**
IBC	Qscan	QscanI (indoor version)	Barcode scanner	**Supported by design**
Zebra	DS9300	DS9308	Barcode scanner	**Supported by design**

STid OSDP devices

The following STid OSDP devices are supported for use with ClearID when using QR codes as a credential for visitors.

Manufacturer	Series	Model	Part Number	Device type	Version
STid	Architect®	ARC-AQ	SY-ARC-W33-AQPH5-7OS1	QR code reader • Classic Reader • QR Code Module	**Supported by design** All STid readers Firmware version 10 or later[1]
STid	Architect®	ARC-BQ	SY-ARC-W33-BQPH5-7OS1	QR code reader • Keypad Reader • QR module	**Supported by design** All STid readers Firmware version 10 or later[1]
STid	Architect® Blue	ARCS-AQ/BT	SY-ARCS-W33-AQBT1-7OS1	QR code reader • Classic reader	**Supported by design** All STid readers Firmware

Manufacturer	Series	Model	Part Number	Device type	Version
				• Crypto processor • QR Code module • Bluetooth	version 10 or later[1]
STid	Architect® Blue	ARCS-BQ/BT	SY-ARCS-W33-BQBT1-7OS1	QR code reader • Keypad reader • Crypto processor • QR Code module • Bluetooth	**Supported by design** All STid readers Firmware version 10 or later[1]
STid	SECard[2] - High security programming kit (Configuration software for the QR code reader)	Not applicable	KIT-SECARD-BT-V3.X	• STid ARC-G USB encoder • USB key containing SECard software	**Supported by design** Software version 3.5 or later.

STid model codes explained:

- ARCS = Crypto Processor
- AQ = reader + QR code
- BQ = Keypad reader + QR code
- BT = Bluetooth

[1] If you are re-using existing readers, refer to *STid documentation* about how to upgrade your reader to firmware version 10 or later.

IMPORTANT: [2] Genetec Inc. does not provide support for the STid SECard solution. Customers require the stand-alone STid SECard software to configure the STid OSDP readers to work with the ClearID ACS panel solution.

Related Topics

Self-Service Kiosk options on page 615
System requirements on page 74

Best practices

Use the provided best practices to help you successfully plan, design, and configure your Genetec ClearID™ system deployments.

This information is intended for end users, integrators, or deployment contacts who are responsible for planning, designing, and configuring a ClearID system.

Review the following best practices before planning your deployments:

- Setting up ClearID for a new Synergis system on page 80
- Setting up ClearID with an existing Synergis system on page 81

Setting up ClearID for a new Synergis system

Consider the following best practices when building a new Synergis™ system to align with Genetec ClearID™ for an eventual ClearID implementation.

This information is intended for end users, integrators, or deployment contacts who are responsible for planning, designing, and configuring a ClearID system.

IMPORTANT: Because every system has different requirements, these best practices alone cannot be used to deploy your system. The deployment steps vary depending on your organizations architecture and current setup.

- Use this information as a starting point only for basic planning purposes.
- If you require help with your deployment, contact your deployment contact.

BEST PRACTICE: Ensure that you always test your new deployment implementation in a demo environment before applying to your production environment.

Pre-ClearID deployment tasks

1. Plan your **Sites** and **Areas** to suit your access requirements.
   TIP: Think about meaningful names that relate to the **sites** or **areas** that end users will request.
   a. Plan out the *Sites* and *Areas* that require access control.
      - Example sites: Main building, Satellite office 1, Satellite office 2 and so on.
      - Example areas: 1st floor, 2nd floor, server room, auditorium, and so on.

      NOTE: A site is typically one physical building or a cluster of buildings in close proximity. The site configuration applies to the entire site so it should be controlled by the same sets of policies (access configurations and visitor management configurations).
   b. Plan out the *Roles* that you require for your access and identity grouping.
      - Example roles: Sales, Marketing, Executives, Faculty, Students, Production crew, Contractors, All permanent employees, All part-time employees.
   c. (Optional) Consider attribute-based provisioning to automate role memberships.

   NOTE: Make a note of these sites, areas, and roles for use during the deployment tasks (steps 3 on page 81 and 4 on page 81) detailed later in this procedure.
2. (Optional) Test your setup and configuration in a ClearID demo environment.
   a. Connect your ClearID demo account to a Synergis demo system.
   b. Contact your Genetec Inc. representative to request a ClearID DEMO account and a Synergis demo system.
      IMPORTANT: The configuration performed in a demo environment cannot be migrated to a production system.

Deployment tasks

1. Connect your new production Synergis system with your ClearID production account.
   a. Install the ClearID plugin.
   b. Connect Security Center to ClearID.
2. Synchronize identities with your data source.

   Depending on your specific requirements, do one of the following:

   - Synchronize your identities using the Genetec ClearID™ One Identity Synchronization Tool.
   - Synchronize your identities using the API.
3. In the ClearID web portal, create the **sites** and **areas** that you planned earlier.
   a. Create your sites.
   b. Create your areas.
4. In the ClearID web portal, create the **roles** and **attribute provisioning policies** that you planned earlier.
   a. Create your roles.
   b. (Optional) Create attribute-based provisioning policies to automate role memberships.

Related Topics

About cardholder and identity relationships on page 85
About custom fields on page 101
About One Identity Synchronization Tool attribute fields on page 506

Setting up ClearID with an existing Synergis system

Consider the following best practices when setting up Genetec ClearID™ with an existing Synergis™ system.

This information is intended for end users, integrators, or deployment contacts who are responsible for planning, designing, and configuring a ClearID system.

IMPORTANT: Because every system has different requirements, these best practices alone cannot be used to deploy your system. The deployment steps vary depending on your organizations architecture and current setup.

- Use this information as a starting point only for basic planning purposes.
- If you require help with your deployment, contact your deployment contact.

BEST PRACTICE: Ensure that you always test your new deployment implementation in a demo environment before applying to your production environment.

Pre-ClearID deployment tasks

1. Prepare your cardholder information.
   a. In Security Center, make sure that the existing cardholders have the required information to link with ClearID identities.

      IMPORTANT: Cardholder **Email** field or **External ID** custom field must be populated.

      - This check ensures that existing identities and future identities are linked with pre-existing cardholders.
      - Future cardholders created by ClearID will already be linked correctly.

2. Plan your **Sites** and **Areas** to suit your access requirements.

   TIP: Refer to your existing Synergis system when planning out your requirements. Think about meaningful names that relate to the **sites** or **areas** that end users will request.

   a. Plan out the *Sites* and *Areas* that require access control.

      - Example sites: Main building, Satellite office 1, Satellite office 2 and so on.
      - Example areas: 1st floor, 2nd floor, server room, auditorium, and so on.

      NOTE: A site is typically one physical building or a cluster of buildings in close proximity. The site configuration applies to the entire site so it should be controlled by the same sets of policies (access configurations and visitor management configurations).

   b. Plan out the *Roles* that you require for your access and identity grouping.

   c. (Optional) Consider attribute-based provisioning to automate role memberships.

   NOTE: Make a note of these sites, areas, and roles for use during the deployment tasks (steps 3 on page 82 and 4 on page 82) detailed later in this procedure.

3. (Optional) Test your setup and configuration in a ClearID demo environment.

   a. Connect your ClearID demo account to a Synergis demo system.

   b. Contact your Genetec Inc. representative to request a ClearID DEMO account and a Synergis demo system.

      IMPORTANT: The configuration performed in a demo environment cannot be migrated to a production system.

Deployment tasks

1. Connect your existing production Synergis system with your ClearID production account.

   a. Install the ClearID plugin.

   b. Connect Security Center to ClearID.

2. Synchronize identities with your data source.

   Depending on your specific requirements, do one of the following:

   - Synchronize your identities using the API.
   - Synchronize your identities using the Genetec ClearID™ One Identity Synchronization Tool.

3. In the ClearID web portal, create the **sites** and **areas** that you planned earlier.

   a. Create your sites.

   b. Create your areas.

4. In the ClearID web portal, create the **roles** and **attribute provisioning policies** that you planned earlier.

   a. Create your roles.

   b. (Optional) Create attribute-based provisioning policies to automate role memberships.

Related Topics

About cardholder and identity relationships on page 85
About custom fields on page 101
About One Identity Synchronization Tool attribute fields on page 506

4

ClearID plugin

Learn how to download and install the plugin.

This section includes the following topics:

About ClearID plugin for Security Center

The Genetec ClearID™ Plugin integrates Genetec ClearID™ with Security Center and connects Synergis™ and ClearID cloud services. Any actions performed in ClearID are automatically synchronized with Synergis.

NOTE: Genetec ClearID™ was designed with a focus on the API. This API focus means that an Account administrator can create an API integration and use their own tools or services to communicate with our API.

You can download the ClearID plugin for Security Center here.

Related Topics

ClearID API

About cardholder and identity relationships

Depending on the type of systems you want to integrate in Genetec ClearID™, you can choose to manage your cardholders and credentials manually or use ClearID to manage them automatically.

For cardholders that aren't created by ClearID, ClearID doesn't initially know which *identity* the *cardholder* belongs to. In this situation, ClearID finds different cardholder fields, identifies relationships, and associates them with the correct corresponding identities in the ClearID system.

ClearID compares the following information before creating a relationship between a cardholder and an identity:

- **Global unique identifier (GUID):** When our system creates a cardholder, we use the same GUID as the identity to create it.

  TIP: You can find the GUID in the identity record URL for a ClearID user.

  ```
  https://demo.clearid.io/techdoc/organization/identities/139e92cd-44b9-427e-8727-
  ```

  ```
  bf7681ef0a8d
  ```

  Where **139e92cd-44b9-427e-8727-bf7681ef0a8d** is the GUID.
- **Email address:** If the business email is the same as the cardholder email.
- **External ID:** This field is an external identifier for creating identities in ClearID using the identity service API. The ClearID plugin creates this field in Security Center as a custom field for cardholders.

BEST PRACTICE: In Config Tool, check that all your cardholders have a valid business email address or external ID before adding your systems in ClearID. This check ensures that cardholders are correctly associated with the corresponding identities. For more information, see Setting up ClearID with an existing Synergis system on page 81.

Scenario 1: Automatically manage cardholders and credentials

Select the **Genetec ClearID: Cardholder and credential changes are synchronized back to Security Center** radio button when you have a Security Center system and you want ClearID to create and manage your cardholders and credentials.

For example, a customer has a new Security Center system that is deployed without any cardholders or credentials already defined. By installing the ClearID plugin and adding access to identities, the corresponding cardholders and credentials are populated in the Security Center system and are automatically synchronized.

TIP: Use the Credentials configuration in the ClearID portal to synchronize your credentials.

For more information about credentials synchronization, see Configuring credential replication on page 236.

Scenario 2: Manually manage cardholders and credentials

Select the **Security Center: Cardholders and credentials in ClearID are read-only** radio button when you want ClearID to use existing cardholders and credentials without managing their state. In this situation, ClearID has access to Security Center cardholders and credentials in read-only mode because you want ClearID to know about your cardholders and credentials, but you never want ClearID to modify them.

For example, a customer has Security Center set up with 1000 cardholders and they use the ClearID plugin to connect the system to ClearID:

- If the **Genetec ClearID: Cardholder and credential changes are synchronized back to Security Center** radio button isn't selected when they add their systems, none of the cardholders or credentials information is modified or synchronized. Cardholders and credentials must be created and synchronized

using other solutions. For example, Lightweight Directory Access Protocol (LDAP), Global Cardholder Synchronizer role, import plugins, and so on.

- If the Security Center system is already synchronized with an LDAP, they should synchronize ClearID with the same LDAP source.

TIP: Use LDAP or the *Global Cardholder Synchronizer* role in Security Center to create and synchronize cardholders and credentials.

For more information about global cardholder synchronization, see Global cardholder management.

Related Topics

Reviewing cardholders and identities information on page 90

Adding a system on page 92

Synchronizing identity pictures with Security Center on page 129

Downloading and installing the plugin

To integrate the Genetec ClearID™ web application into Security Center, you must install the ClearID plugin on a Security Center server.

Before you begin

Ensure the following:

- Your server meets the recommended system requirements.
- A compatible version of Security Center is installed.

What you should know

BEST PRACTICE: Although it's possible to host the ClearID role on any server, for best system performance host that role on a dedicated expansion server.

- To install or configure the plugin in Security Center, you must be a Site administrator. For example, local security, system integrator, or Security Center administrator.
- Synergis Professional or Omnicast Professional is required for plugins support in Security Center.
- Failover or Federation™ are not supported.

Procedure

1 Open the GTAP Product Download page.

2 From the **Download Finder** list, select your version of Security Center.

3 Search for your package by name and download it.

4 Download the plugin *.exe* file here.

5 Follow your browser prompts to download the *.exe* file.

6 Stop the Genetec Server, and close Security Desk and Config Tool.

7 Open the extracted folder, right-click the *setup.exe* file, and click **Run as administrator**.

8 Open the downloaded file folder location, right-click the *setup.exe* file, and click **Run as administrator**.

9 Follow the installation instructions.

The plugin is installed to *C:\Program Files (x86)\Genetec Inc\Genetec Security Center Plugins - ClearID* by default.

10 On the *Installation Wizard Completed* page, click **Finish**.

After you finish

Return to Config Tool, and connect the ClearID plugin to ClearID cloud services account.

BEST PRACTICE: Use the Genetec™ Update Service (GUS) to keep the ClearID plugin up to date. For more information, see About the Genetec Update Service.

Related Topics

How the integration works on page 13

Creating the plugin role

Before you can configure and use the Genetec ClearID™ plugin, you must create the plugin role in Config Tool.

Before you begin

Download and install the plugin.

What you should know

- To install or configure the plugin in Security Center, you must be a Site administrator. For example, local security, system integrator, or Security Center administrator.
- Each plugin role can only connect to or communicate with one unique ClearID system name at a time. For environments with multiple systems, you must create a plugin role for each system.

Procedure

1 From the Config Tool homepage, open the *Plugins* task.

2 In the *Plugins* task, click **Add an entity** (), and select **Plugin**.

The plugin creation wizard opens.

3 On the *Specific info* page, select the server on which the plugin role is hosted, the plugin type, and the database for the plugin role, and then click **Next**.

If you do not use expansion servers in your system, the **Server** option is not displayed.

IMPORTANT: The entry in the **Database server** field might default to the *(local)\SQLEXPRESS* setting. If this is not the correct server, choose the correct server from the **Database server** list.

4 On the *Basic information* page, specify the role information:

a) Enter the **Entity name**.

b) Enter the **Entity description**.

c) Select the **Partition** for the plugin role.

If you do not use partitions in your system, the **Partition** option is not displayed. Partitions are logical groupings used to control the visibility of entities. Only users who are members of that partition can view or modify the role.

d) Click **Next**.

5 On the *Creation summary* page, review the information, and then click **Create**, or **Back** to make changes.

After the plugin role is created, the following message is displayed: The operation was successful.

6 Click **Close**.

7 If you require multiple systems in your ClearID environment, repeat this procedure for each additional role that you require.

The plugin role appears in the entity browser.

After you finish

You can now connect Security Center to ClearID.

Connecting Security Center to ClearID

Before you can connect the Genetec ClearID™ plugin role to your ClearID account, you must add your ClearID system and download an activation file. This activation file is then used to connect your Security Center system to the ClearID web application.

Before you begin

Create the plugin role.

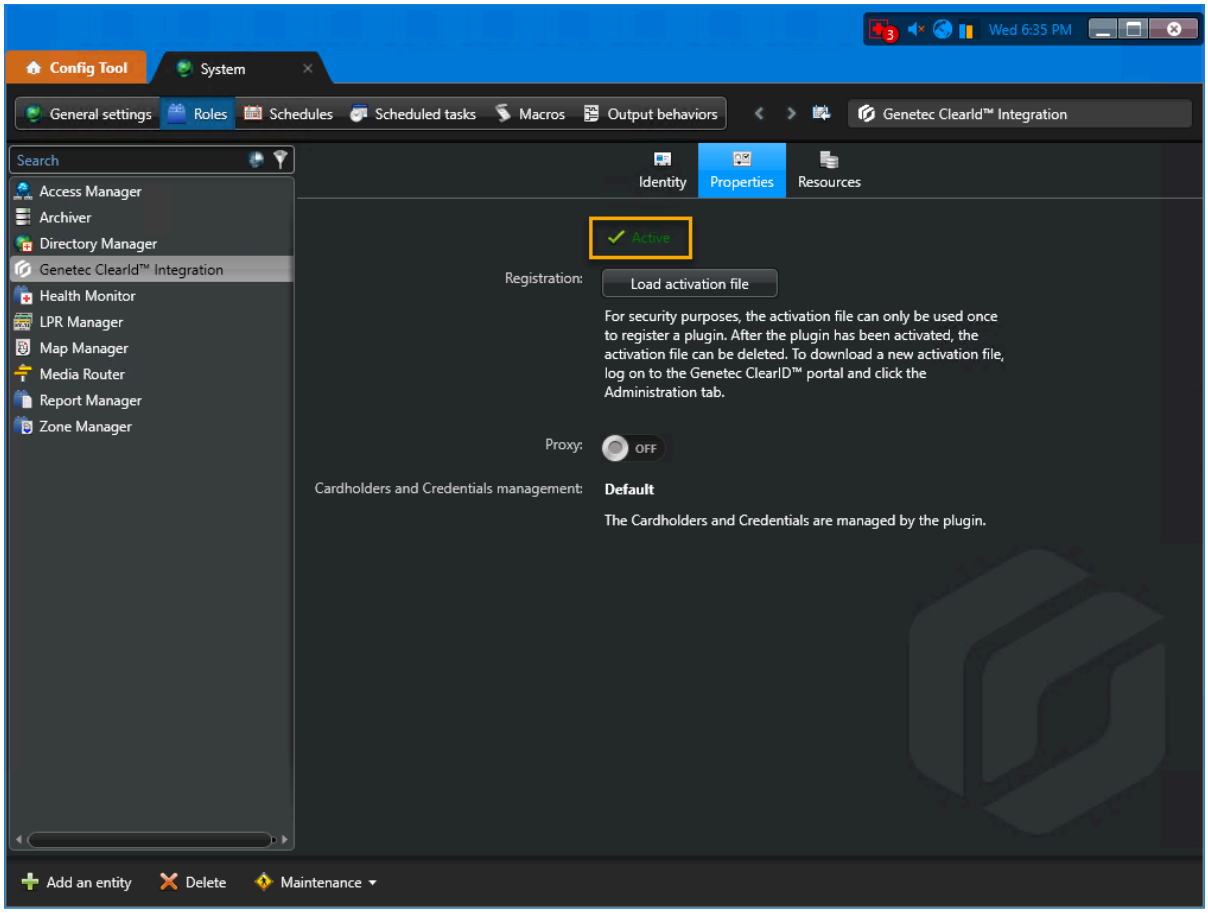
What you should know

- To create systems in ClearID, you must be a Global administrator.
- To install or configure the plugin in Security Center, you must be a Site administrator. For example, local security, system integrator, or Security Center administrator.
- An activation file is used to authenticate the communication between your Security Center system and the ClearID web application.

Procedure

1. (Optional) If you have pre-existing Synergis™ cardholders, review your cardholders and identities information.
2. Add a system to ClearID.
3. Download the activation file for the system you just created.
4. Configure the connection settings using the activation file you just downloaded.
5. If you require multiple systems in your ClearID environment, repeat these steps for each additional system name that you require.

The ClearID plugin is now connected to Security Center.



Related Topics

Synchronizing identity pictures with Security Center on page 129

Reviewing cardholders and identities information

To ensure that cardholders are correctly associated with their corresponding identities in Genetec ClearID™ when systems are added, check that all cardholders have a valid business email address.

Before you begin

Learn about cardholder and identity relationships.

What you should know

This procedure is only applicable when you are setting up ClearID with an existing Synergis™ system that contains cardholders.

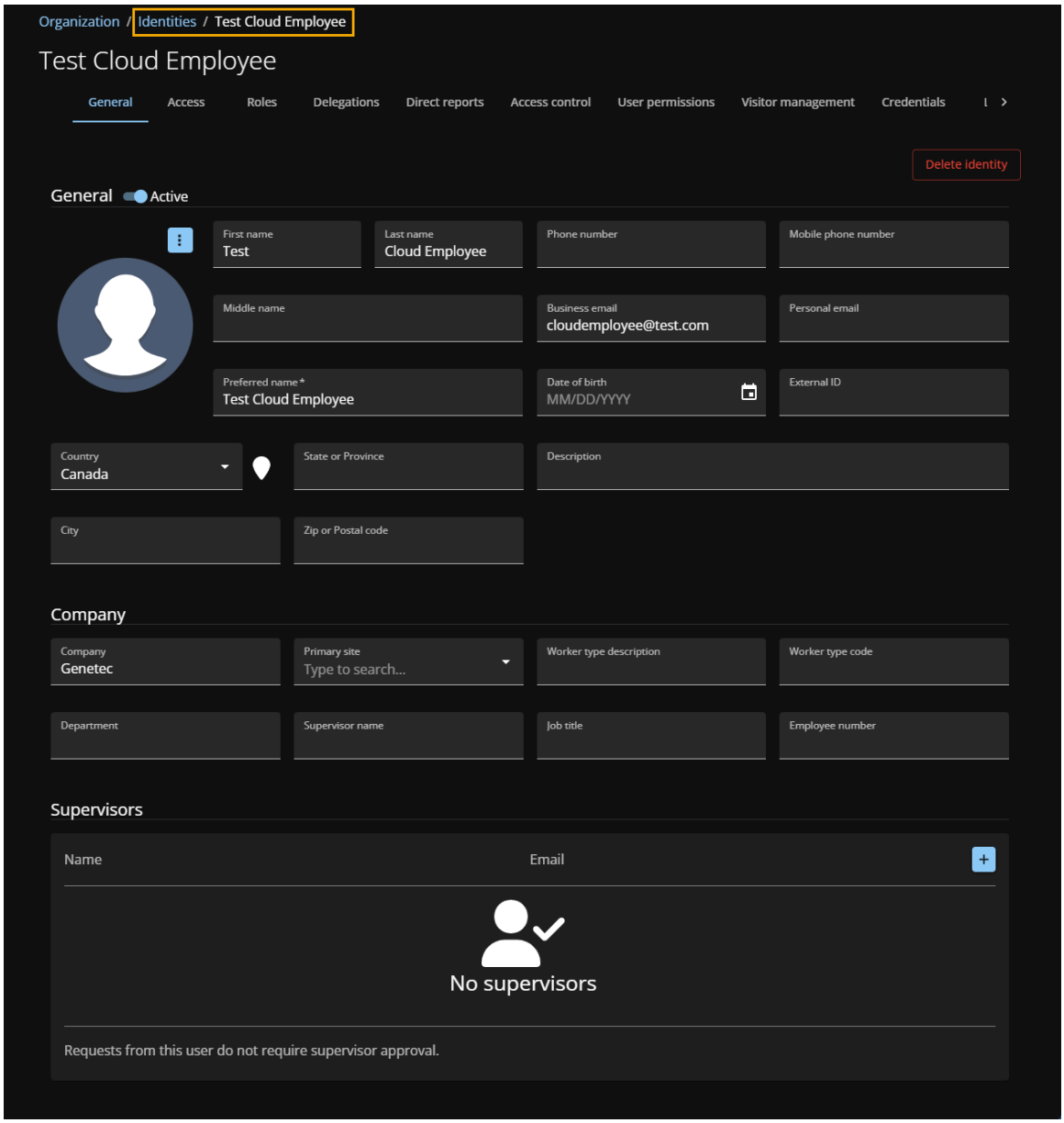
- All existing cardholders in Security Center require a valid business email address before they can be associated with their corresponding identities in ClearID.
- If all cardholders are created by ClearID, then the GUID is used to associate the cardholders with their corresponding identities automatically.

Procedure

To review identities in ClearID:

1 From the *Home* page, click **Organization** > **Identities**.

2 Click an identity in the list to see the identity details.
The following example shows a ClearID identity:



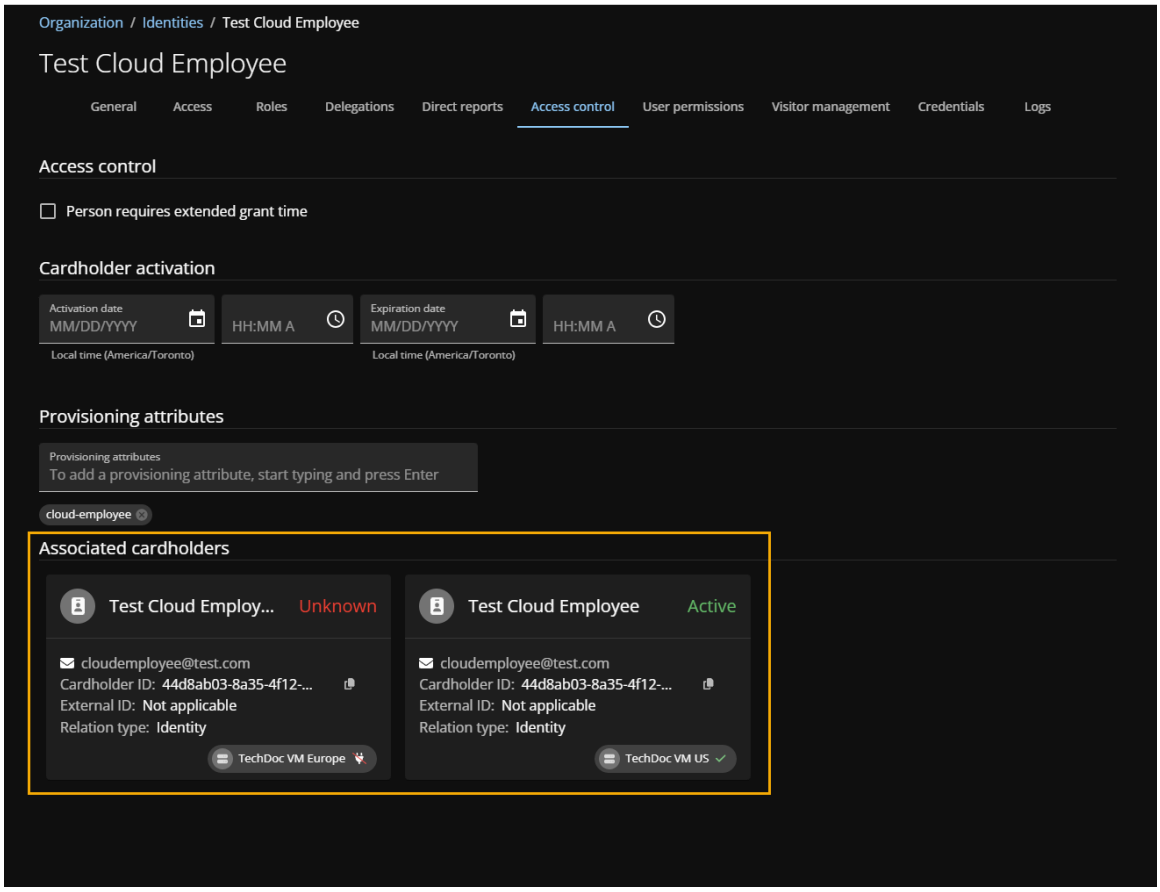
To review cardholders associated with a ClearID identity:

1 From the *Home* page, click **Organization** > **Identities**.

2 Click an identity in the list to see the identity details.

3 Click **Access control**.

A list of Security Center cardholders associated with a ClearID identity is displayed in the *Associated cardholders* section.



After you finish

Add your systems.

Related Topics

About cardholder and identity relationships on page 85
Synchronizing identity pictures with Security Center on page 129

Adding a system

Before you can connect the Genetec ClearID™ plugin role to your ClearID account, you must add your Security Center systems to ClearID.

Before you begin

- Create the plugin role.

- (Optional) If you have pre-existing Synergis™ cardholders, follow the best practices for Setting up Genetec ClearID™ with an existing Synergis™ system.
  - In Config Tool, check that all your cardholders have a valid business email address or external ID before adding your systems in ClearID. This check ensures that cardholders are correctly associated with the corresponding identities.
- Connect Security Center to ClearID.

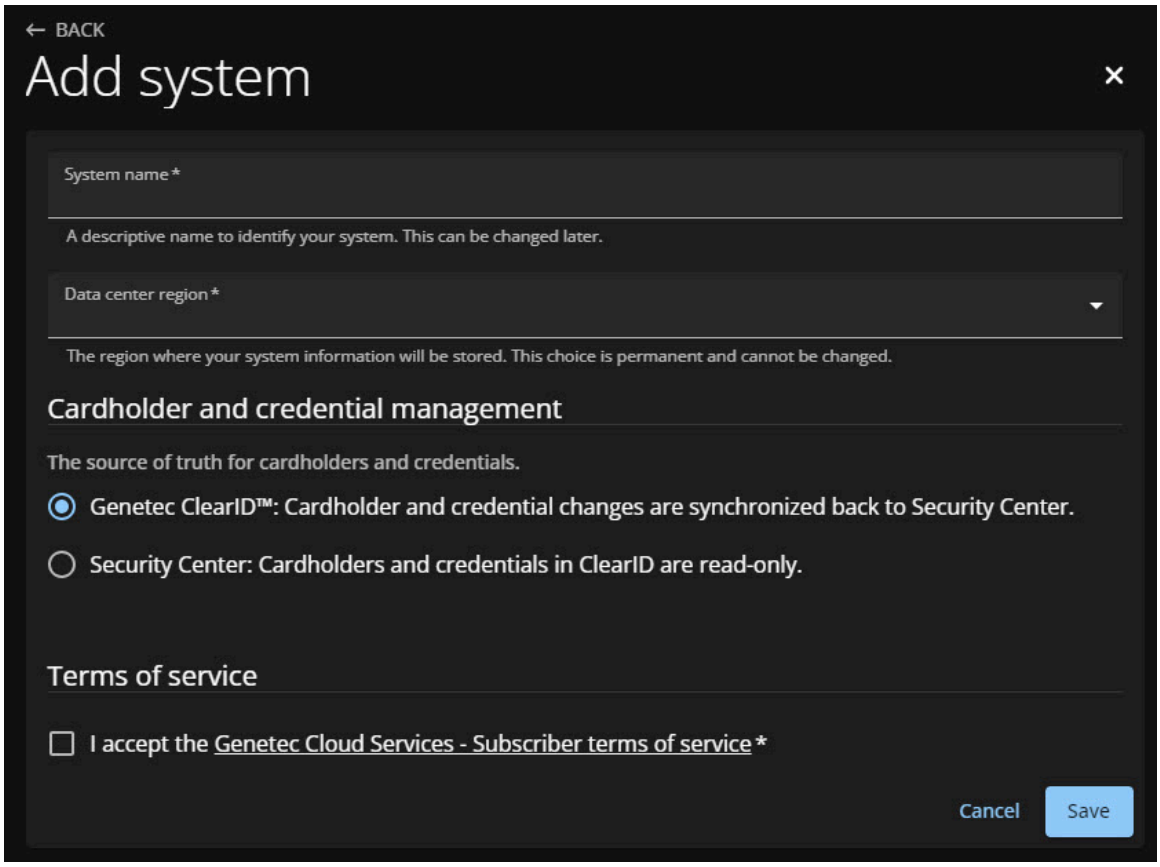
What you should know

- To create systems in ClearID, you must be a Global administrator.

Procedure

1 Log on to your ClearID account.

2 From the *Dashboard*, click **Administration** > **Add system**.



NOTE: The **Data center region** option is not available for accounts deployed in regional architectures, such as Europe-only, Canada-only, or Australia-only data centers.

3 In the *Add system* dialog box, complete all the fields:

a) Enter a system name.

TIP: Use a system name that represents the name of the account and the associated data center region. For example, `GenetecEuropeSC`.

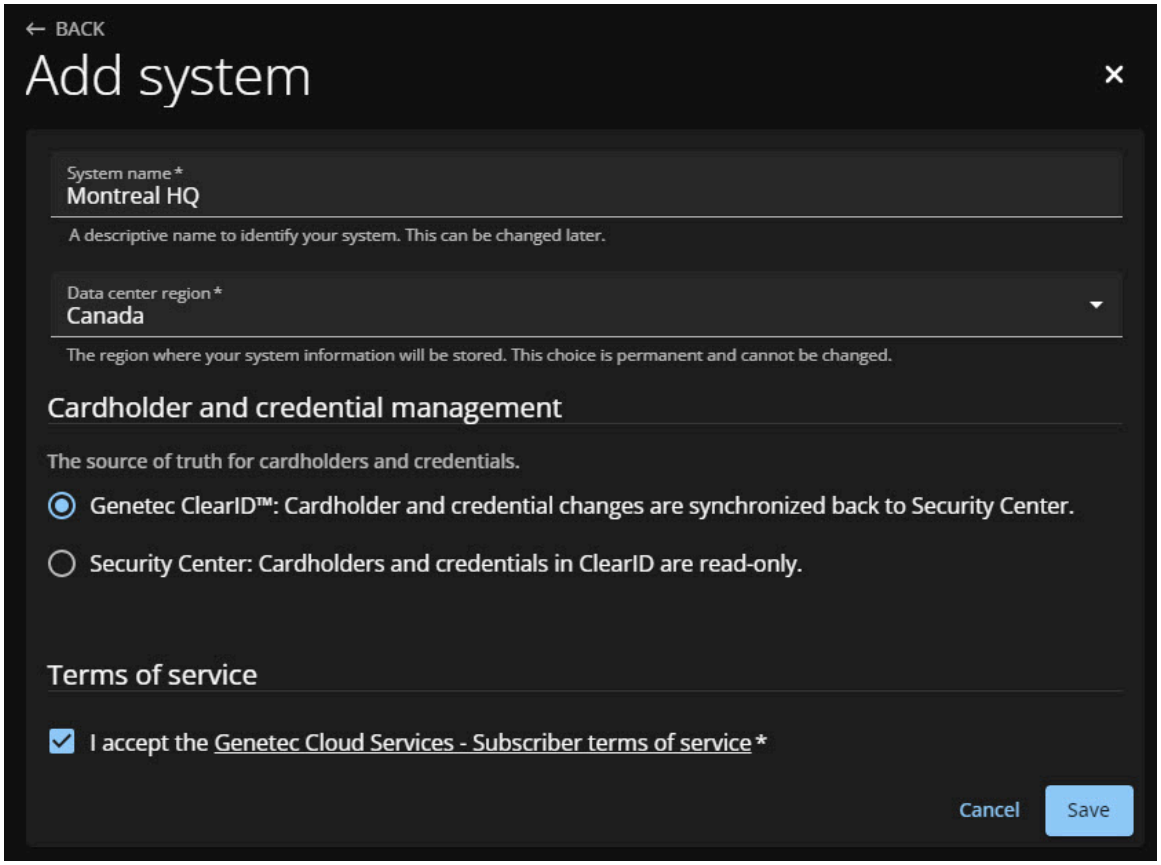
b) From the **Data center region** list, select a region that applies to the geographical location of your system or where you want data stored.

c) If you want ClearID to populate cardholder and credential fields automatically, select **Genetec ClearID™: Cardholder and credential changes are synchronized back to Security Center**.

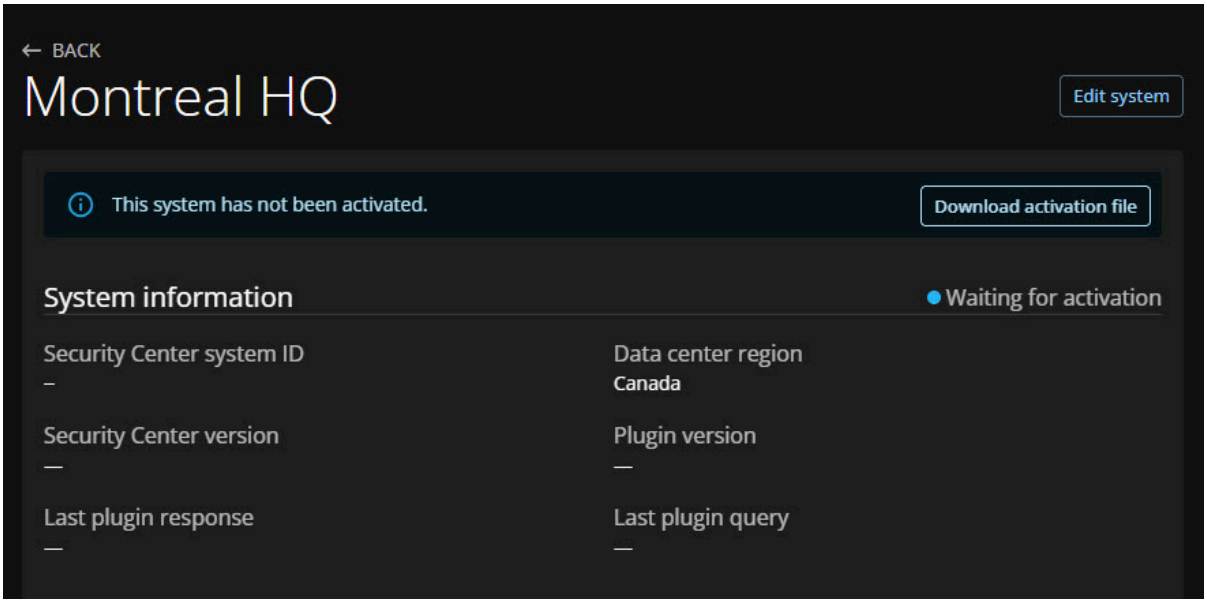
This is the default option.

d) If you want to manage cardholder and credential fields manually, select **Security Center: Cardholders and credentials in ClearID are read-only**.

e) Select the checkbox to accept the terms of service, and click **Save**.



Your new system is created. The system remains inactive until you download an activation file and register the ClearID plugin.



Example

Watch this video to learn more. Click the **Captions** icon (**CC**) to turn on video captions in one of the available languages.

After you finish

Download the activation file.

Related Topics

About ClearID system states on page 100
About cardholder and identity relationships on page 85

Downloading an activation file

Before you can connect the Genetec ClearID™ plugin role to your ClearID account, you must download an activation file. This activation file is then used to connect your Security Center system to the ClearID web application.

Before you begin

Add a system.

What you should know

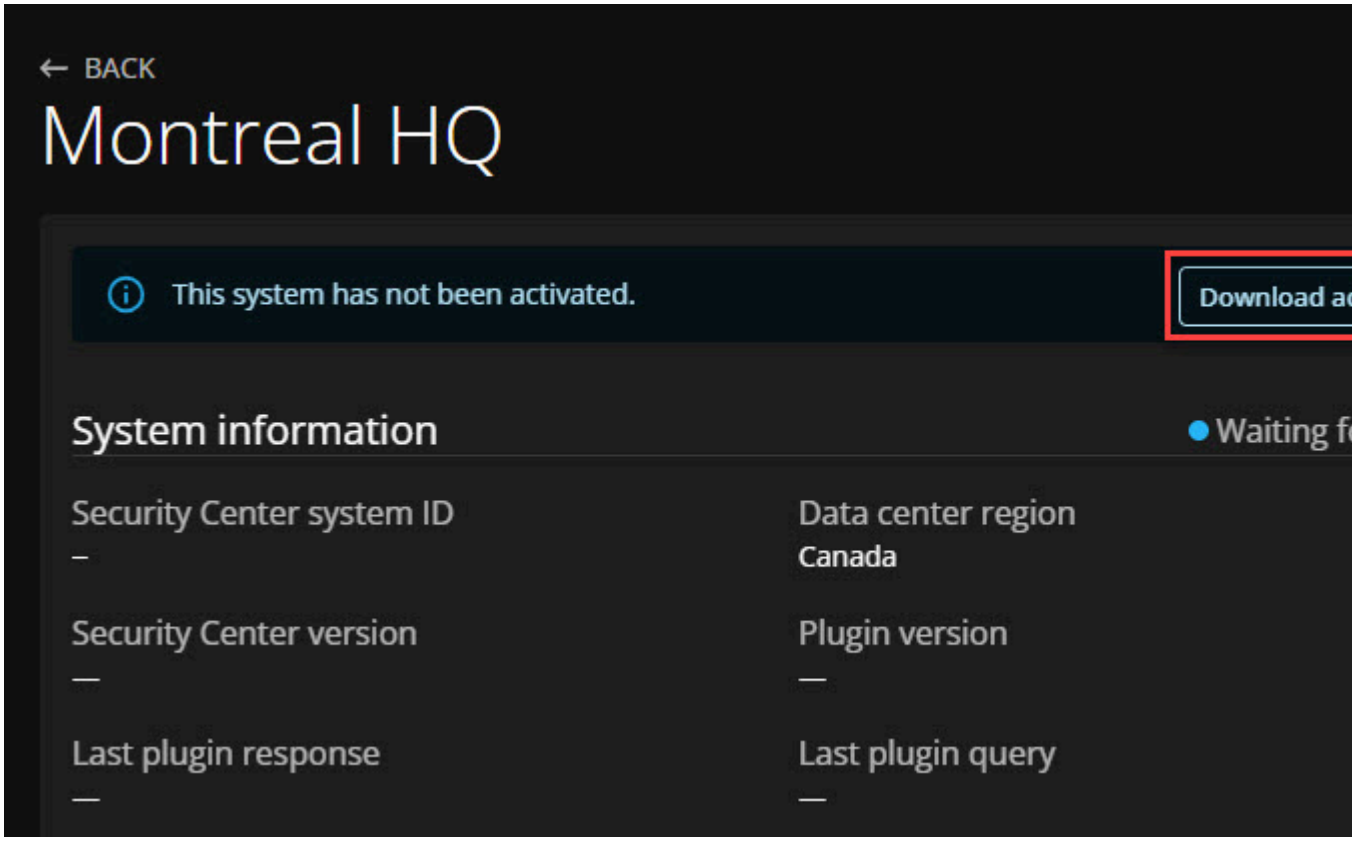
- To install or configure the plugin in Security Center, you must be a Site administrator. For example, local security, system integrator, or Security Center administrator.

Procedure

1 From the *Dashboard*, click the **Administration** tab.

2 On the **Systems** page, select a system.

3 Click **Download activation file** to save the file in *json* format.



TIP: Note the location of the activation file for later use. By default, the activation files are named *systemname-systemID-activation-file.json*.

Example

Watch this video to learn more. Click the **Captions** icon (**CC**) to turn on video captions in one of the available languages.

After you finish

Configure the connection settings.

Configuring connection settings

To configure connection settings, you must load a previously downloaded activation file. This activation file is then used to connect your Security Center system to the Genetec ClearID™ web application.

Before you begin

Download an activation file.

What you should know

- To install or configure the plugin in Security Center, you must be a Site administrator. For example, local security, system integrator, or Security Center administrator.
- An activation file is used to authenticate the communication between your Security Center system and the ClearID web application.
- For security purposes, the activation file can only be used once to register a plugin. After the plugin is activated, the activation file can be deleted.

Procedure

1 From the Config Tool homepage, open the *Plugins* task.

2 Select ClearID Integration from the entity browser, and click the **Properties** tab.

3 Click **Load activation file** and select the activation file that you previously downloaded.

4 (Optional) Configure the proxy server settings:

A proxy server is a server that verifies and forwards incoming client requests to other servers for further communication. For example, when a client is unable to meet the security authentication requirements of the server but should be permitted access to some services.

- **ON:** Specifies that a proxy server is required to access the Internet. This option is typically used by customers behind a firewall or where network access to the Internet is restricted.
- **OFF:** Specifies that a proxy server is not required. This is the default.
- **Proxy URL:** If Proxy is enabled, enter the proxy URL supplied by your organization. For example, *https://proxy:8080/outgoing*. This information is typically supplied by the network administration team.

5 (Optional) Configure the proxy authentication settings:

Proxy authentication is the process of validating user credentials for access to a proxy server. This authentication typically includes a username and can also include a password.

- **ON:** Specifies that proxy authentication is required.
- **OFF:** Specifies that proxy authentication is not required.
- **Proxy username:** If proxy authentication **ON** was enabled, enter the proxy username supplied by your organization.

6 If proxy authentication **ON** is specified, set a proxy authentication password:

a) Click **Set password**.

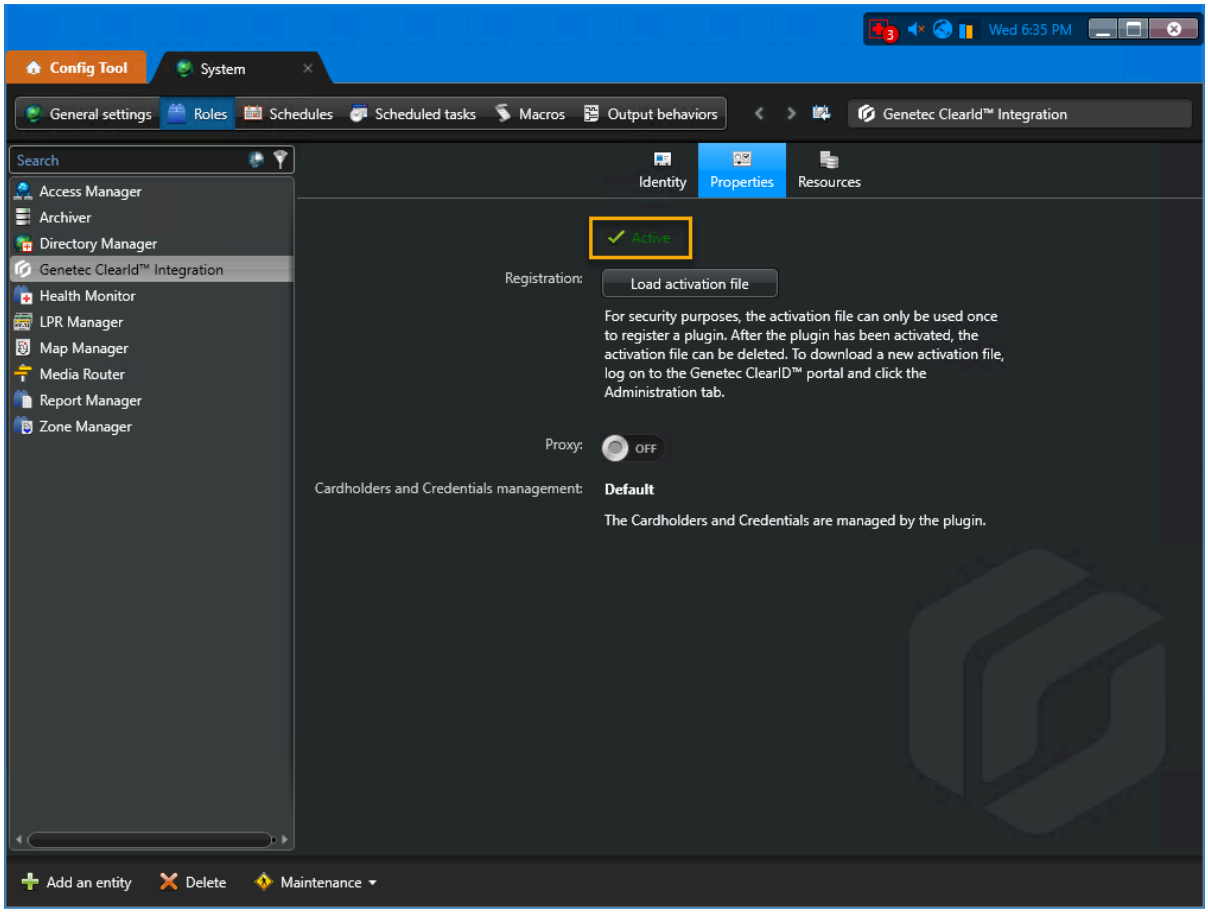
b) Enter a **New Password** and then confirm the password.

NOTE: Use industry best practices for creating strong passwords.

c) Click **Apply** to save your password.

7 Click **Apply** to save all changes.

The ClearID plugin is now connected to Security Center.


Wed 6:35 PM
Config Tool
System
General settings
Roles
Schedules
Scheduled tasks
Macros
Output behaviors
Genetec Clearid™ Integration
Search
Access Manager
Archiver
Directory Manager
Genetec Clearid™ Integration
Health Monitor
LPR Manager
Map Manager
Media Router
Report Manager
Zone Manager
Identity
Properties
Resources
Active
Registration:
Load activation file
For security purposes, the activation file can only be used once to register a plugin. After the plugin has been activated, the activation file can be deleted. To download a new activation file, log on to the Genetec ClearID™ portal and click the Administration tab.
Proxy:
OFF
Cardholders and Credentials management:
Default
The Cardholders and Credentials are managed by the plugin.
Add an entity
Delete
Maintenance

Granting user privileges

To allow users to access the Genetec ClearID™ plugin features and tasks, you must grant them the correct user privileges in Security Center.

What you should know

For administrators to install and configure the plugin in Config Tool, and for operators to use Security Desk functions, the correct user privileges must be granted to their user accounts.

This topic lists the minimum user privileges required.

NOTE: You might require more privileges, depending on the tasks you want to perform in Config Tool and Security Desk. For more information, see the Security Center privileges spreadsheet for your version.

Procedure

1 From the Config Tool homepage, open the *User management* task.

2 Select the relevant user, and click the **Privileges** tab.

3 Set the following privileges to **Allow**:

- **Application privileges** > **Security Desk**
- **Application privileges** > **Config Tool**
- **Administrative privileges** > **System management** > **View role properties**
- **Administrative privileges** > **System management** > **View server properties**
- **Task privileges** > **Administration** > **Plugins**

4 (Optional) Set the custom field privileges that you require to **Allow**.

- **Administrative privileges** > **Access control management** > **View cardholder group properties** > **Modify cardholder group properties** > **Modify custom fields**
- **Administrative privileges** > **Access control management** > **View cardholder properties** > **Modify cardholder properties** > **Modify custom fields**
- **Administrative privileges** > **Access control management** > **View credential properties** > **Modify credential properties** > **Modify custom fields**
- **Administrative privileges** > **Access control management** > **View visitor properties** > **Modify visitor properties** > **Modify custom fields**
- **Administrative privileges** > **System management** > **View general settings** > **Modify custom field definitions**

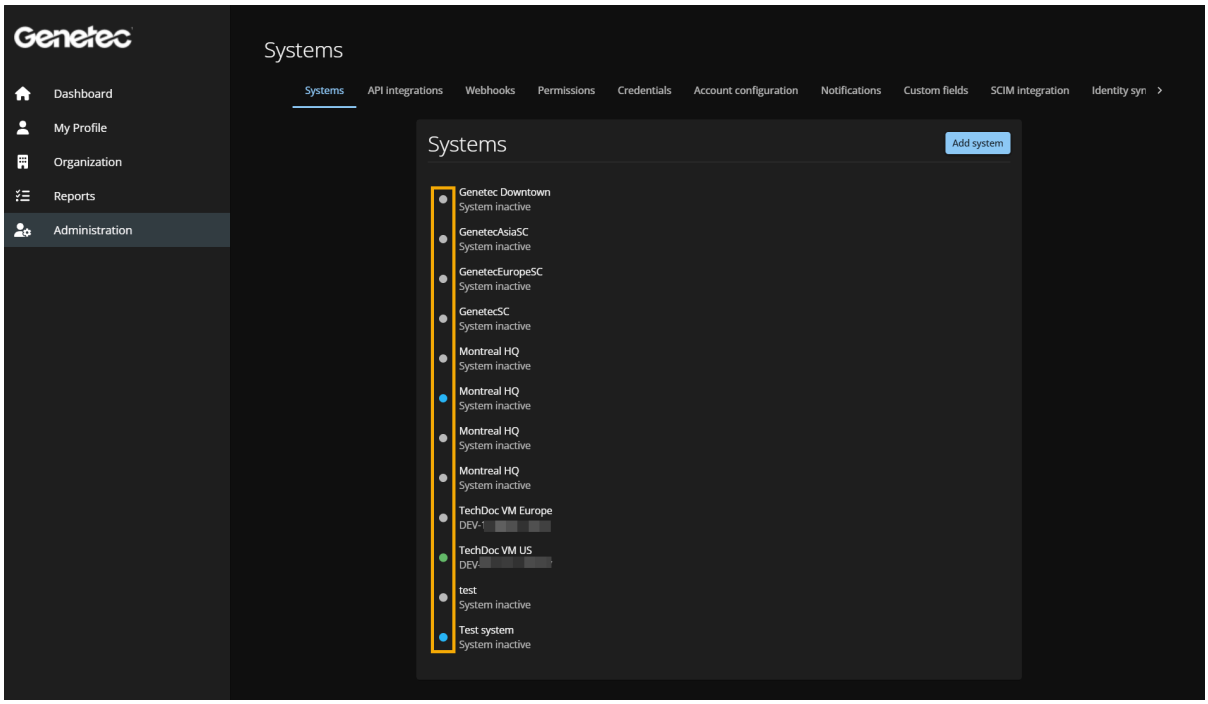
5 Click **Apply**.

Related Topics

About custom fields on page 101

About ClearID system states

When you create or configure a Genetec ClearID™ system, the system goes through different states before being online or active. You can see the real-time status of ClearID systems on the *Systems* page.



Hover over the dot beside each ClearID system name to view its status:

- **Creating:** Indicates that a new *system name* is being created.
- **New:** Indicates that the *system name* has been successfully created. The activation file can now be downloaded to register the system.
- **Not available:** Indicates that the API is not available, or is unable to respond.
- **Offline:** Indicates that the system is offline. This status is displayed when the plugin has not sent a *heartbeat* response within 10 - 15 minutes to ClearID.
- **Online:** Indicates that the system is registered, online, and connected to the ClearID plugin.
- **Unknown:** Indicates that the system status cannot be obtained.
- **Waiting for activation:** Indicates that the activation file was downloaded and the system is waiting for activation.
- **Warning:** Indicates that the ClearID cloud services or the ClearID plugin did not process a message request within 10 minutes.

TIP: Move your mouse over a system status in the **Status** column to display the status explanation in the user interface.

Related Topics

Adding a system on page 92

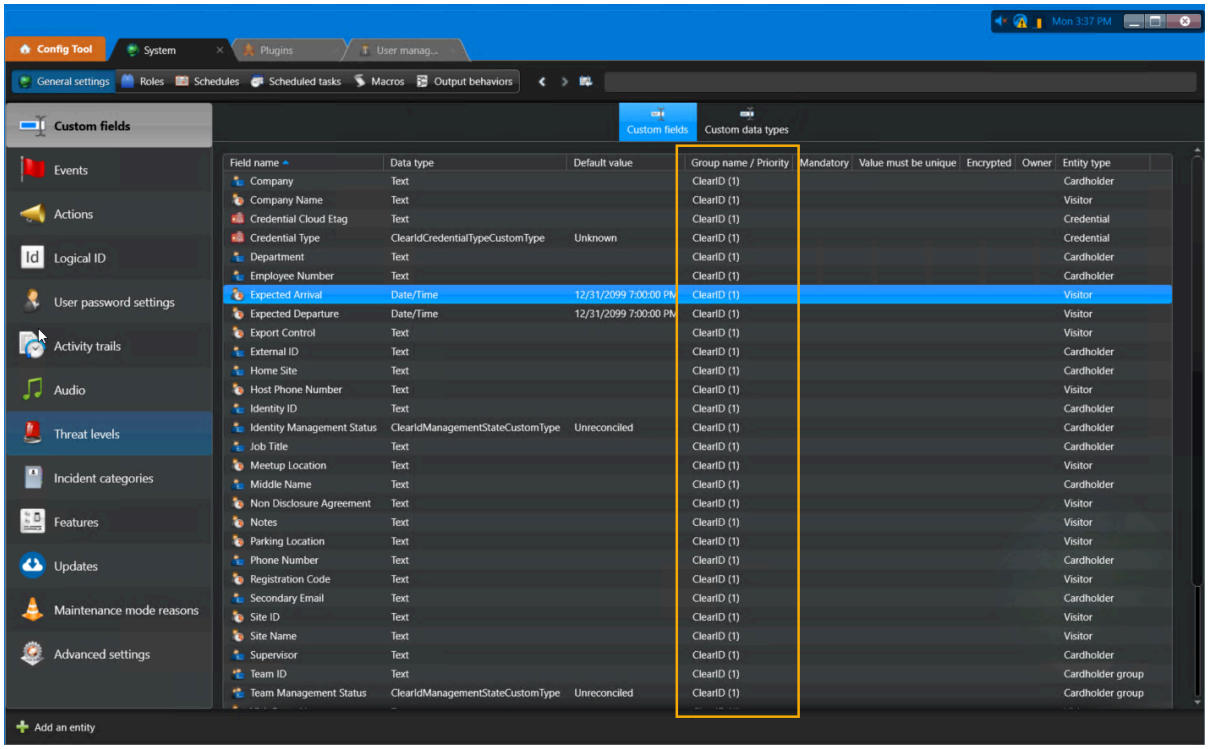
About custom fields

A custom field is a user-defined property associated with an entity type. Custom fields are useful for storing additional information.

In Security Center, Genetec ClearID™ uses custom fields for visitors, credentials, and cardholders functions. The group name **ClearID** is used to identify the custom fields associated with ClearID, and can be found in the **Group name/Priority** column.

IMPORTANT: ClearID custom fields should be used as read-only fields. These custom field values are populated and managed by ClearID. If you have existing custom fields, and the name and entity type matches the ClearID custom fields, ClearID will use the existing custom fields.

You can see the complete list for your organization in Config Tool. In the *System* task, click **General settings** > **Custom fields**.



NOTE: Only users with the privilege *Modify custom field definitions* can view custom fields.

Related Topics

Granting user privileges on page 99

Modifying custom fields

You can modify Genetec ClearID™ custom fields in Config Tool so that they are displayed to specific groups or users. For example, you might display visit reason, registration code, expected arrival, and expected departure to a group that contains your security team or building reception team.

Before you begin

Make sure that the **Genetec ClearID: Cardholder and credential changes are synchronized back to Security Center** radio button is selected for the ClearID system, otherwise no custom fields are displayed.

What you should know

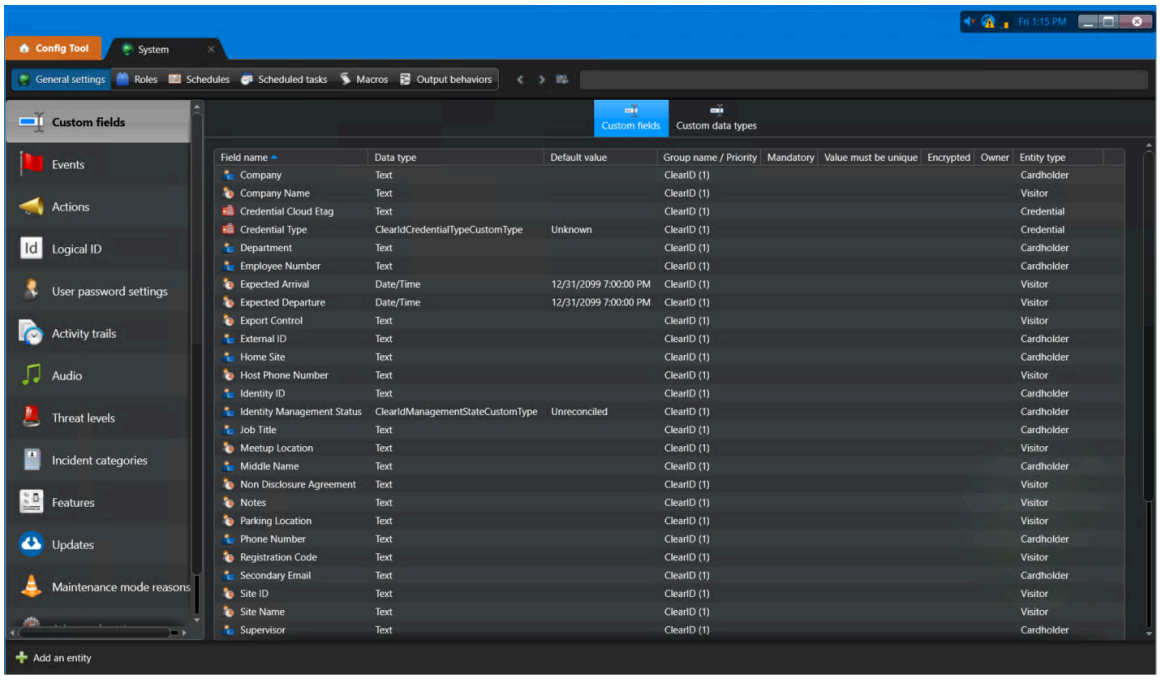
Only users with the privilege to *Modify custom field definitions* can view custom fields.

- At least one identity must have been synchronized before any custom fields are displayed.

Procedure

1 In Config Tool, Open the *System* task.

2 Click **Custom fields**.

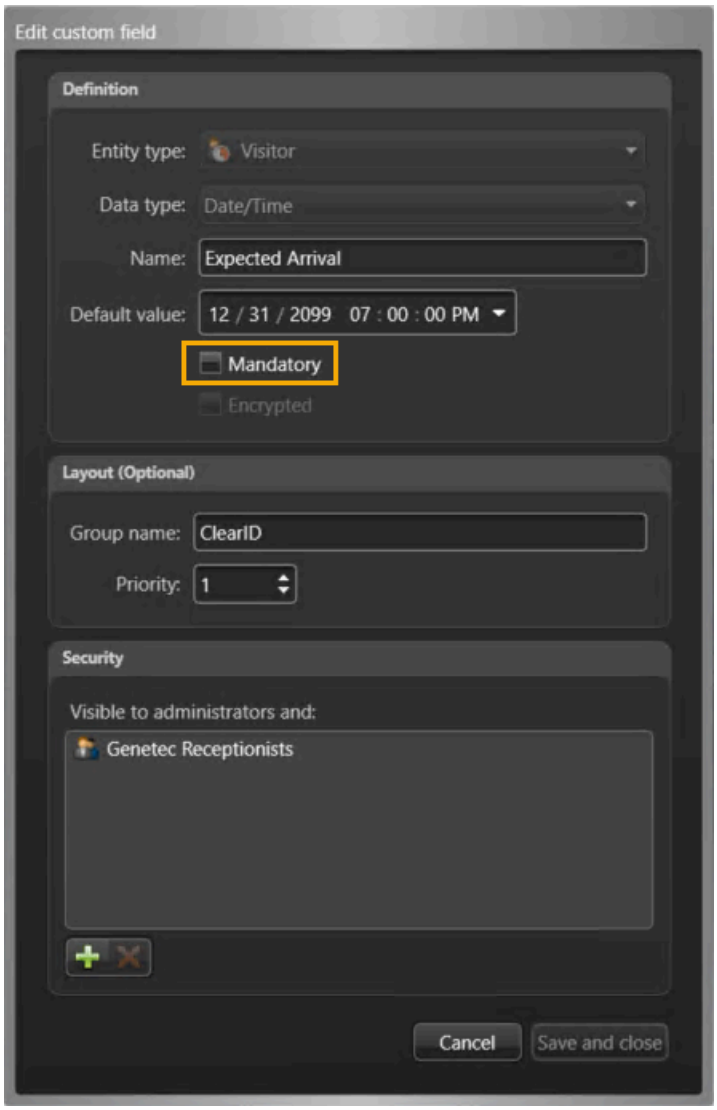


3 In the **Custom fields** tab, double-click a **Field name** to select the custom field that you want to modify.

4 In the *Edit custom field* dialog, make any changes that you require.

a) In the *Definition* section, make any changes that you require.

IMPORTANT: Do not select the **Mandatory** checkbox for custom fields. In ClearID, custom fields must not be mandatory or unique otherwise synchronization issues can occur.



b) In the *Layout* section, make any changes that you require.

For example, you could add a group name to categorize your custom fields, or you could remove a custom field from a group when a grouping is no longer applicable.

c) In the *Security* section, make any changes that you require.

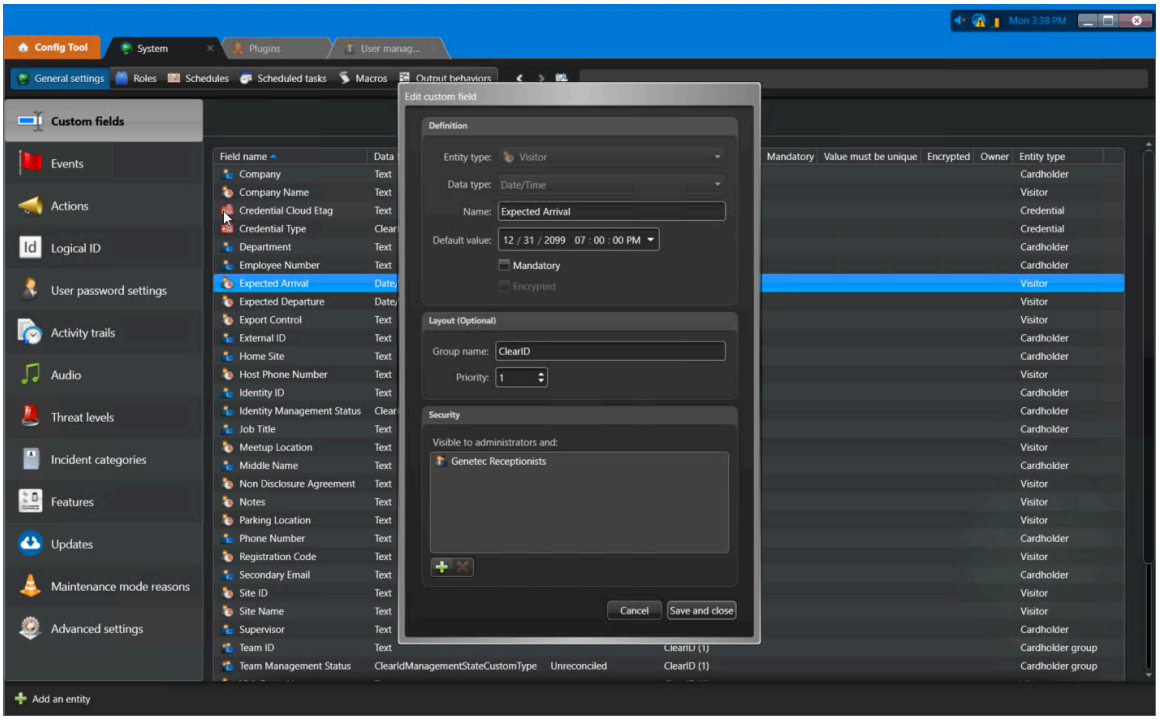
For example, you might add users or user groups in the *Security* section so that the custom field is displayed to them.

For more information about *user groups* or *custom fields*, see "Creating user groups" or "About custom fields" in the *Security Center Administrator Guide*.

d) Click **Save and close**.

Example

The following example shows the *Expected arrival* custom field. Using the *Security* section of the *Edit custom field* dialog, the **Genetec Receptionists** user group has been added so that the *Expected arrival* custom field can be displayed to members of the group.

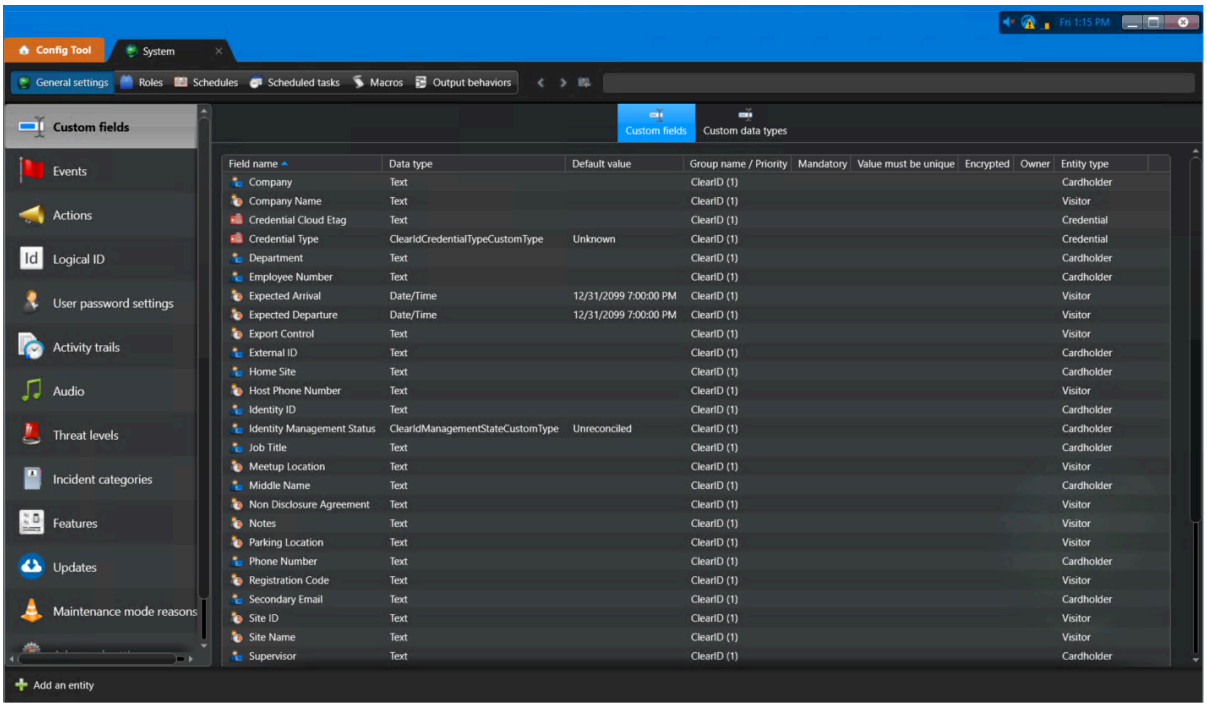


Related Topics

Custom fields not displayed in Security Desk on page 655
Granting user privileges on page 99

Custom fields relationships

Use the following custom fields information to understand the relationship between Genetec ClearID™ identity field names and Security Center entity type fields.



Cardholder fields

Cardholder fields are used to synchronize cardholder information with an identity in ClearID.

Field name	Data type	Default value	Group name (And Priority)
Company	Text		ClearID (1)
Department	Text		ClearID (1)
Employee Number	Text		ClearID (1)
External ID	Text		ClearID (1)
Home Site	Text		ClearID (1)
Identity ID	Text		ClearID (1)
Identity Management Status	ClearIdManagementStateCustomType	Unreconciled	ClearID (1)
Job Title	Text		ClearID (1)
Middle Name	Text		ClearID (1)
Phone Number	Text		ClearID (1)

Field name	Data type	Default value	Group name (And Priority)
Secondary Email	Text		ClearID (1)
Supervisor	Text		ClearID (1)
Worker Type Code	Text		ClearID (1)
Worker Type Description	Text		ClearID (1)

Cardholder group fields

Cardholder group fields are used to synchronize cardholder group information with a role in ClearID.

- The **Team ID** represents the role ID in ClearID.
- The **Team Management Status** indicates whether ClearID is managing cardholders and credentials or not (managed by ClearID, not managed by ClearID, deleted by ClearID, or unreconciled).

Field name	Data type	Default value	Group name (And Priority)
Team ID	Text		ClearID (1)
Team Management Status	ClearIdManagementStateCustomType	Unreconciled	ClearID (1)

Credential fields

Credential fields are used by ClearID to keep the credentials up to date.

Field name	Data type	Default value	Group name (And Priority)
Credential Cloud Etag	Text		ClearID (1)
Credential Type	ClearIdCredentialTypeCustomType	Unknown	ClearID (1)

Visitor fields

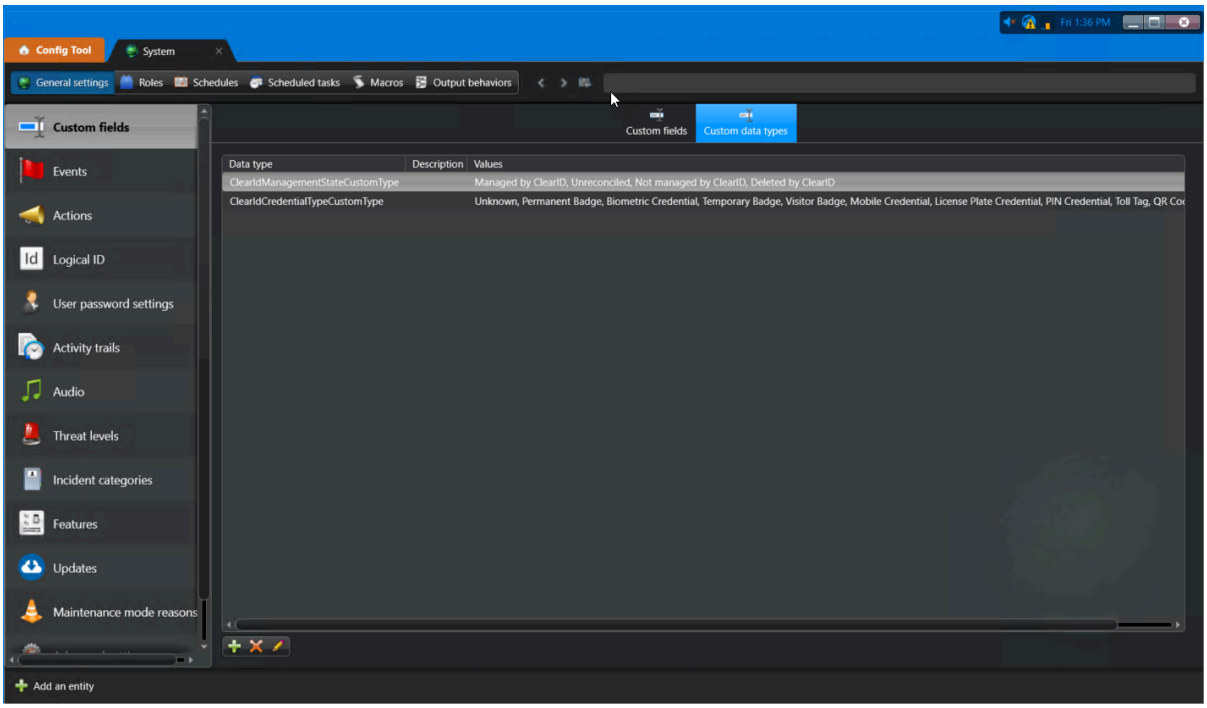
These visitor fields are used to synchronize visitor information.

Field name	Data type	Default value	Group name (And Priority)
Company Name	Text		ClearID (1)
Expected Arrival	Date and time	12/31/2099 7:00:00 PM	ClearID (1)
Expected Departure	Date and time	12/31/2099 7:00:00 PM	ClearID (1)
Export Control	Text		ClearID (1)
Host Phone Number	Text		

Field name	Data type	Default value	Group name (And Priority)
Meetup Location	Text		ClearID (1)
Non Disclosure Agreement	Text		ClearID (1)
Notes	Text		ClearID (1)
Parking Location	Text		ClearID (1)
Registration Code	Text		ClearID (1)
Site ID	Text		ClearID (1)
Site Name	Text		ClearID (1)
Visit Event Name	Text		ClearID (1)
Visit Reason	Text		ClearID (1)
Visitor ID	Text		ClearID (1)
Watchlist Status	Text		ClearID (1)

Custom data types

Custom data types are used for some custom fields to define the accepted values associated with the data types.



NOTE: All custom fields are labels used to define a property associated with a Security Center entity type that might be useful to an organization. The fields included in the description here are merely descriptive labels. All the custom data types might not be applicable to or used by ClearID.

Data type	Values
ClearIdManagementStateCustomType	Managed by ClearID, Unreconciled, Not managed by ClearID, Deleted by ClearID
ClearIdCredentialTypeCustomType	Unknown, Permanent Badge, Biometric Credential, Temporary Badge, Visitor Badge, Mobile Credential, License Plate Credential, Pin Credential, Toll Tag, QR Code

5

Managing identities and users

Learn how to manage identities and users.

This section includes the following topics:

- "Canceling identity requests" on page 223
- "Approving identity requests" on page 226
- "About identity requests report" on page 232
- "Checking the status of identity requests" on page 233

Creating identities

From time to time, you might need to create an identity manually in Genetec ClearID™. For example, for an identity that isn't part of the usual mass import process or synchronization of identities using LDAP, One Identity, or API solutions.

What you should know

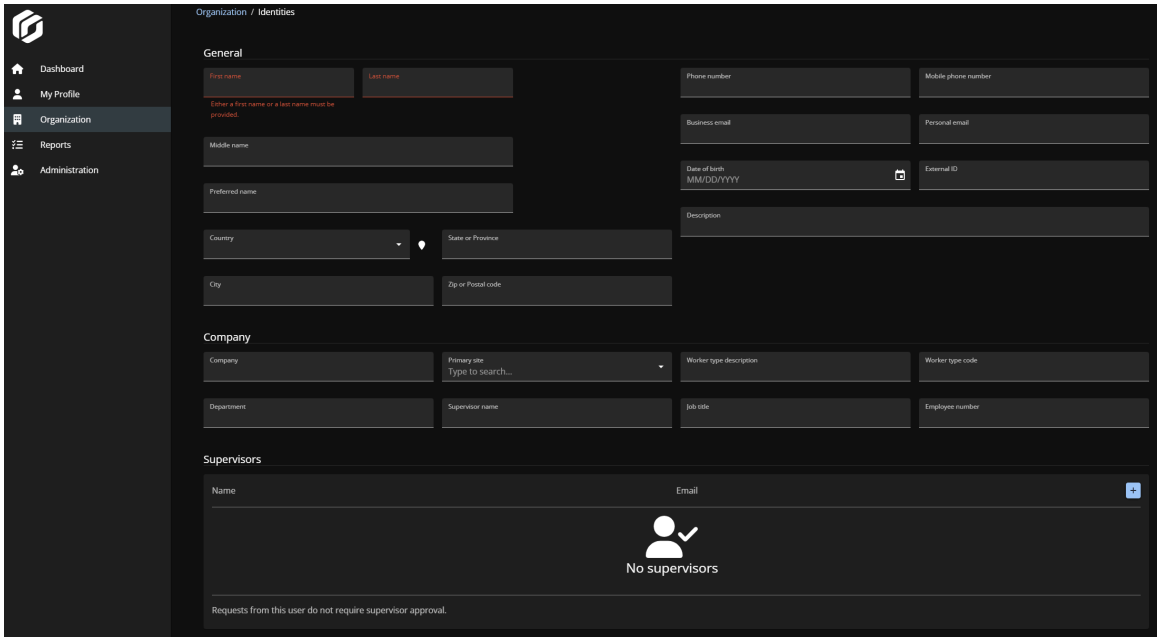
Only an account administrator can create identities.

Account administrators can create an identity manually in the web portal when the identity isn't part of a mass import or synchronization of identities using LDAP, One Identity, or API solutions. For example, a *contractor*, *system integrator*, or other identities might be added manually.

Procedure

1 Click **Organization** > **Identities**.

2 Click **Add an identity**.



3 Complete the mandatory fields:

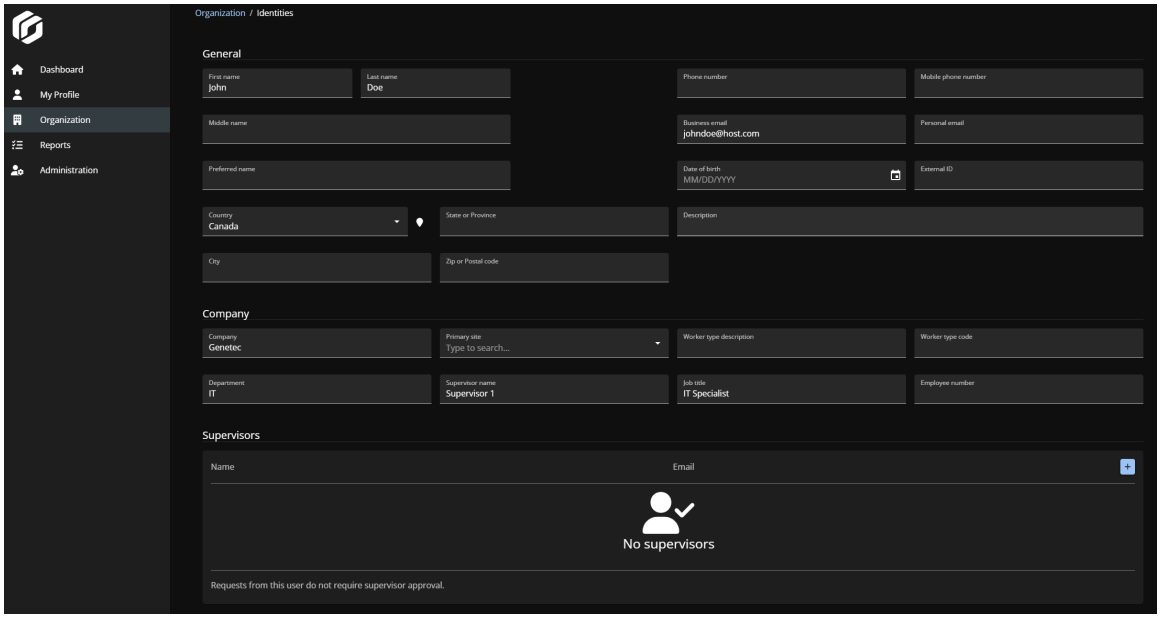
a) Enter a `First name`.

b) Enter a `Last name`.

c) Select a country from the list.

TIP: Enter the first letter of the country to jump to that part of the country list.

4 (Optional) Complete any additional fields that you require. For example:
   a) Enter a `Business email` address.
   b) Enter a `Company name`.
   c) Enter a `Department`.
   d) Enter a `Supervisor name`.
   e) Enter a `Job title`.
   f) Complete other fields as required.



5 Click **Save** to create the identity in Genetec ClearID™.

Example

After you finish

Grant the identity access to the web portal.

Related Topics

Logging on to ClearID on page 33
Viewing direct reports on page 160

Identity fields

Use the following information to help you understand the identity fields that are used in Genetec ClearID™. The following table explains which fields are mandatory, which fields are used by Security Center, and which fields are available for use by provisioning rules.

ClearID identity fields	Type or format	Mandatory in ClearID	Pushed to Security Center	Security Center field name	Available in provisioning rules
Activation date	Date		✓	Activation	
Business email	Email		✓	Email address	
City	Text				
Company	Text		✓	Company	✓
Country	ISO 3 Character	✓			✓
Date of birth	Date				
Department	Text		✓	Department	✓
Description	Text		✓	Description	✓
Display name	Text		✓	Entity name	
Employee number	Text		✓	Employee number	
Expiration date	Date		✓	Expiration	
Extended grant time required	True or False		✓	Use extended grant time	✓
External ID	Text		✓	External ID	✓
First name	Text	✓	✓	First name	
Home site	Unique ID		✓	Home site	✓
Identity ID	Unique ID		✓	Identity	
Job title	Text		✓	Job title	✓
Last name	Text		✓	Last name	
Middle name	Text		✓	Middle name	
Mobile phone number	Phone number				
Personal email	Email		✓	Secondary email	
Phone number	Phone number		✓	Phone number	

ClearID identity fields	Type or format	Mandatory in ClearID	Pushed to Security Center	Security Center field name	Available in provisioning rules
Provisioning attributes	List				✓
State/Province	Text				
Status	Active or Inactive	✓	✓	Status	✓
Supervisor name	Text		✓	Supervisor	✓
Supervisor(s)	List of identities				✓
Worker type code	Text			Worker type code	✓
Worker type description	Text		✓	Worker type description	✓
Zip code	Text		✓		

Related Topics

Configuring role-based access control policies on page 464

Granting additional permissions for identities and roles

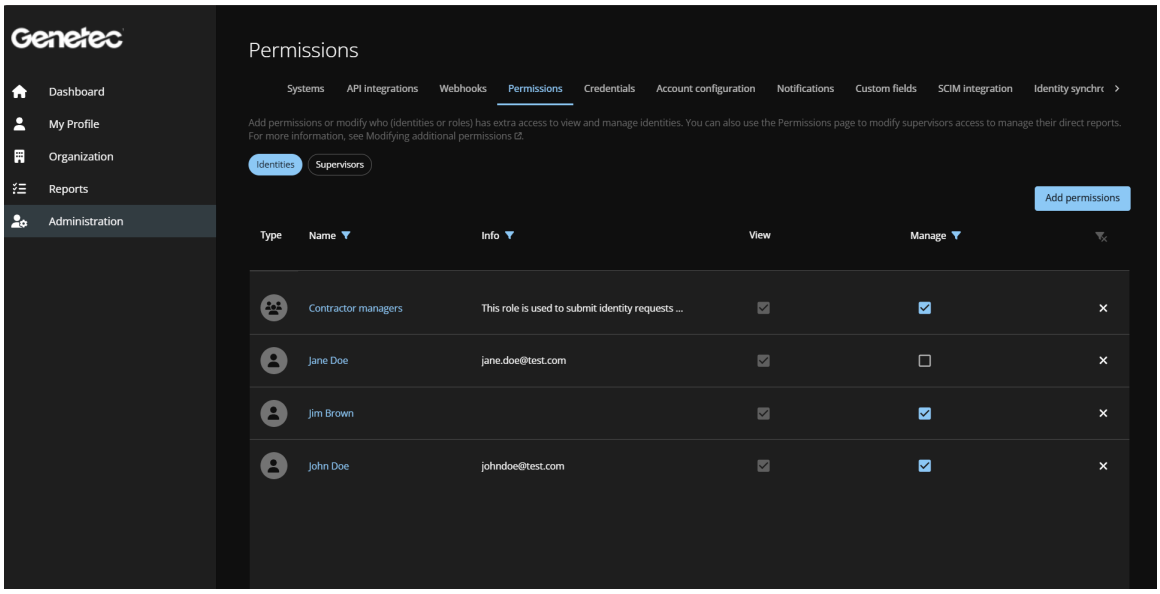
Some organizations require more access than the default permissions provided for a Genetec ClearID™ user. You can grant identities and roles additional permissions so that they can view or manage all identities in the system.

What you should know

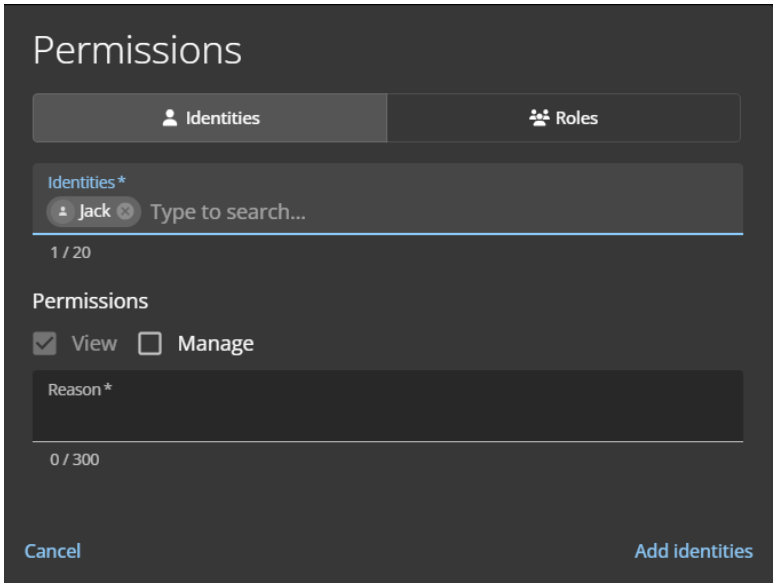
Only an account administrator can add identity and role permissions.

Procedure

1 From the *Home* page, click **Administration** > **Permissions**.



2 Click **Add permissions**.



3 In the *Permissions* dialog, select either **Identities** or **Roles** to add the permissions you require.

4 If you selected **Identities**, complete the following:

a) In the **Identities** field, enter one or more identities that you want to grant extra access.

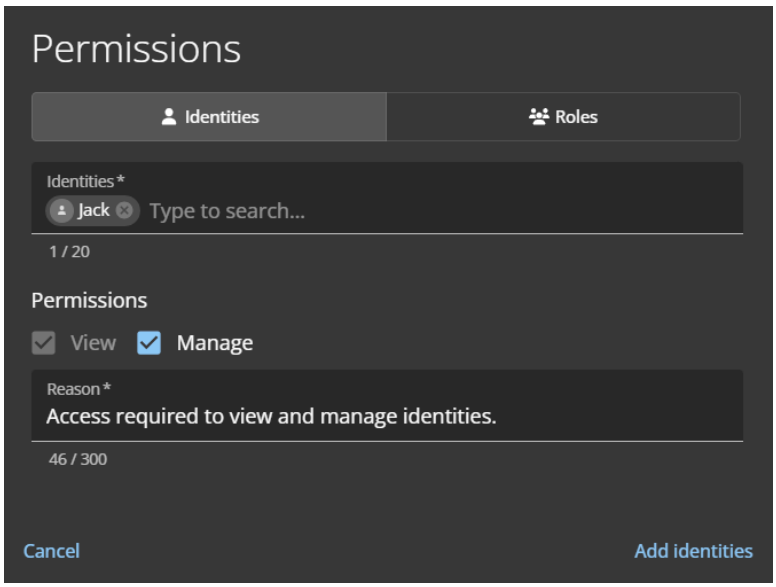
A maximum of 20 identities per request is supported.

b) In the *Permissions* section, select the permissions you want to add to the identities selected earlier.

- **View:** Access to view identities is granted by default.
- **Manage:** Select the **Manage** checkbox to add permissions to modify identities.

  NOTE: If you make updates to identities that are synchronized with an external data source, the synchronization can overwrite your manage permission changes. Manage permissions are useful for identities being manually entered into ClearID.

c) In the **Reason** field, enter a reason why the access was added.



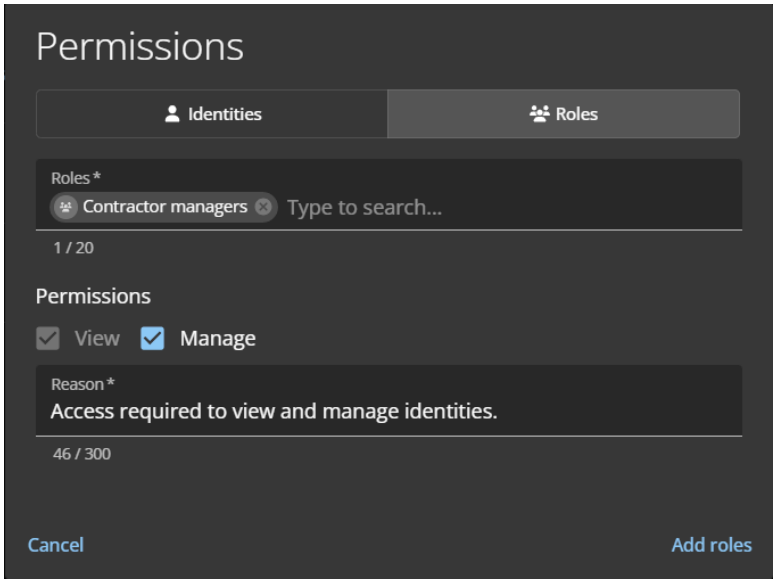
5 If you selected **Roles**, complete the following:

a) In the **Roles** field, enter one or more roles that you want to grant extra access.
A maximum of 20 roles is supported.

b) In the *Permissions* section, select the permissions you want to add to the roles selected earlier.

- **View:** Access to view identities is granted by default.
- **Manage:** Select the **Manage** checkbox to add permissions to modify identities.

c) In the **Reason** field, enter a reason why the access was added.



6 Click **Add identities** or **Add roles** to submit your changes.

The specified identities or roles now have the required permissions to view and manage identities.

After you finish

View identities or Modify identities.

Related Topics

Transferring direct reports on page 169

Granting additional permissions for supervisors

Some organizations require more access than the default permissions provided for a Genetec ClearID™ supervisor. You can grant supervisors additional permissions so that they can manage their direct reports.

What you should know

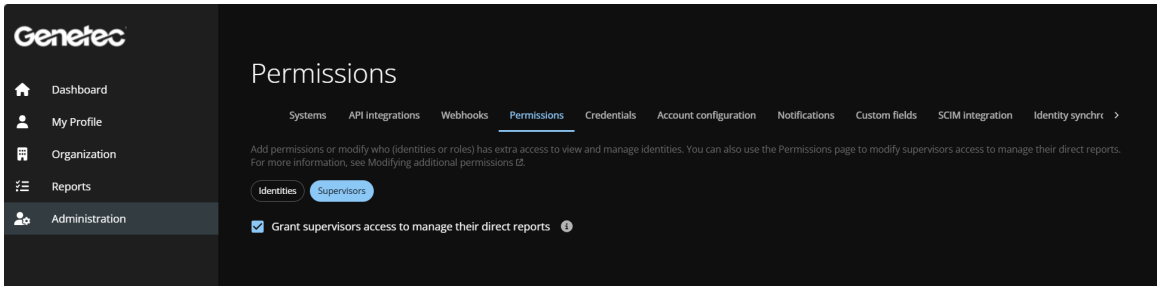
Only an account administrator can grant supervisors access to manage their direct reports.

Procedure

1 From the *Home* page, click **Administration** > **Permissions**.

2 Click the **Supervisors** tab.

3 Select the **Grant supervisors access to manage their direct reports** checkbox to grant supervisors the required permissions to update **General** identity profile information and **Access Control** settings.



4 Click **Save** to confirm the changes.

Supervisors now have more control to manage their direct reports. They can now modify **General** identity information fields and **Access control** settings.

After you finish

Modify your direct reports information.

Related Topics

Transferring direct reports on page 169

Viewing additional permissions

You can use the *Permissions* page to review who (identities or roles) has extra access to view and manage identities. You can also use the *Permissions* page to verify if supervisors have extra access to manage their direct reports.

Before you begin

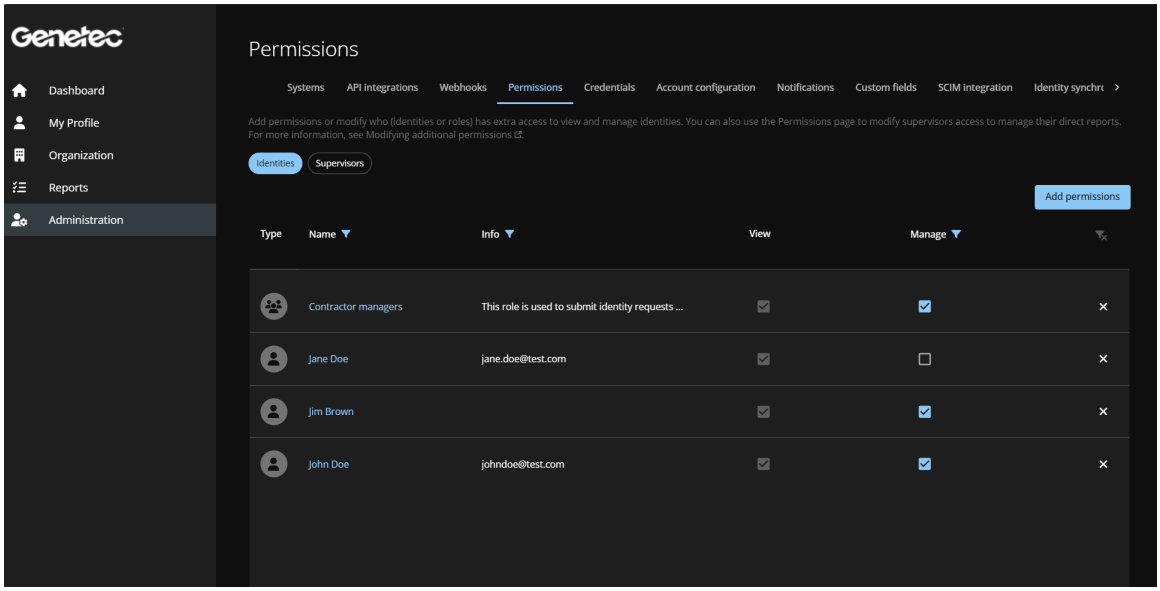
- Grant additional permissions for identities and roles.
- Grant additional permissions for supervisors.

What you should know

Only an account administrator can view identity and role permissions or supervisor permissions.

Procedure

1 From the *Home* page, click **Administration** > **Permissions**.



In the **Type** column, each row has a visual identifier to signify the entry as either a role or an identity.

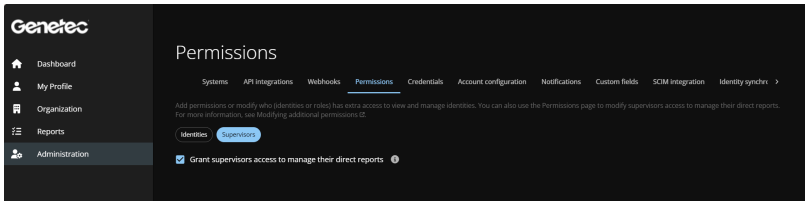
2 In the **Name** column, click to filter results by identity or role name.

3 In the **Info** column, click to filter results by an email address, or enter words to search for in the permission information.

4 In the **Manage** column, click to filter results by permission. For example, to see which identities have **View and Manage** permissions.

5 (Optional) Click **Clear filters** () to reset filters and restore the default page view.

6 (Optional) Click the **Supervisors** tab to verify if supervisors have access to manage their direct reports.



After you finish

Modify additional permissions.

Modifying additional permissions

You can use the *Permissions* page to modify who (identities or roles) has extra access to view and manage identities. You can also use the *Permissions* page to modify supervisors access to manage their direct reports.

Before you begin

View additional permissions.

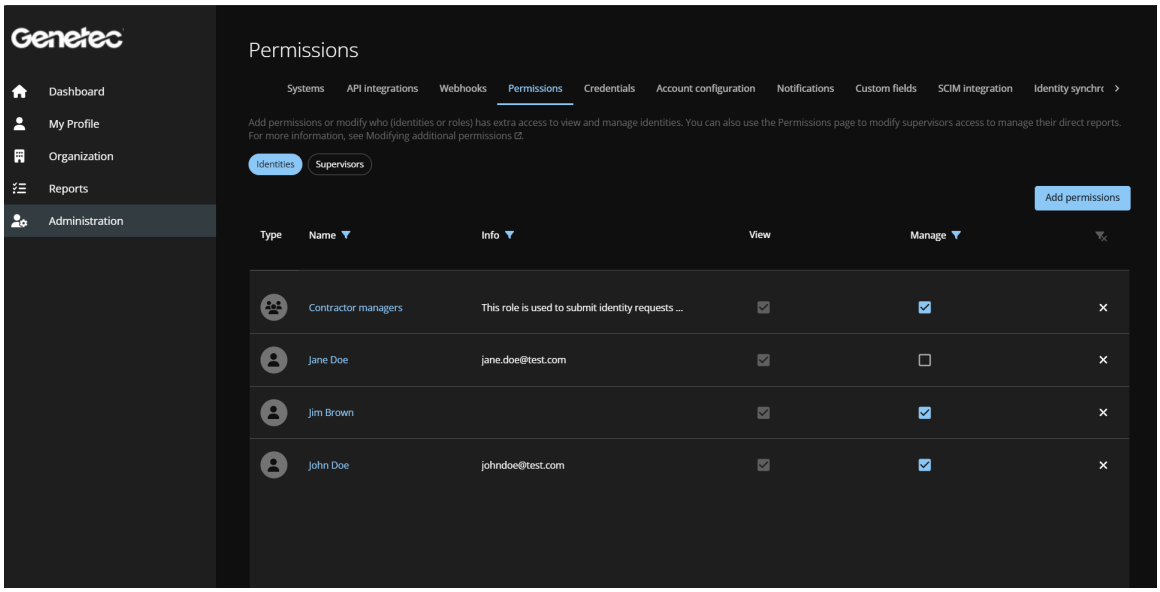
What you should know

Only an account administrator can modify identity and role permissions.

Procedure

To modify identity and role permissions:

1 From the *Home* page, click **Administration** > **Permissions**.



In the **Type** column, each row has a visual identifier to signify the entry as either a role or an identity.

2 In the **Name** column, click to filter results by identity or role name.

3 In the **Info** column, click to filter results by an email address, or enter words to search for in the permission information.

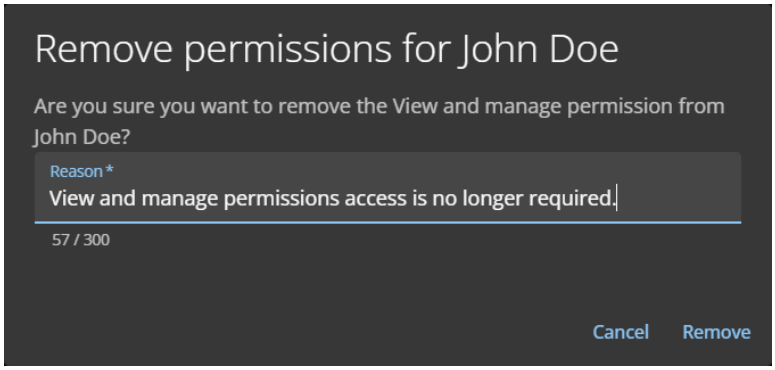
4 In the **Write** column, click to filter results by permission. For example, to see which identities have **Read and Write** permissions.

5 (Optional) Click **Clear filters** ( ) to reset filters and restore the default page view.

6 (Optional) In the **Write** column, select or clear the check box next to an identity or role to add or remove their **Write** access.

a) Click **Save** to submit your changes.

7 (Optional) Click the next to an identity or role to remove extra permissions (**Read** and **Write**) that are no longer required.

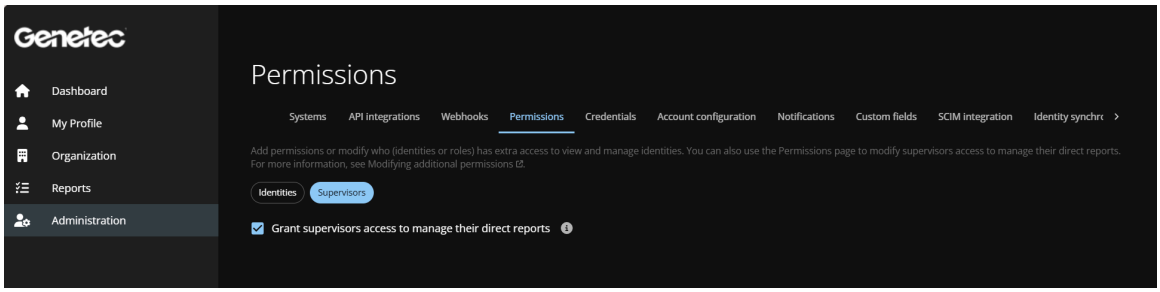


a) Enter a Reason.

b) Click **Remove**.

To modify supervisor permissions:

1 (Optional) Click the **Supervisors** tab to modify supervisor permissions.



a) Make the changes that you require and click **Save**.

Viewing identities

You can view identities in Genetec ClearID™ to check their access control status, general identity information, or verify if they have any supervisors specified.

Before you begin

Create your identities.

What you should know

Only account administrators or identities or roles with the required permissions can view identities.

Procedure

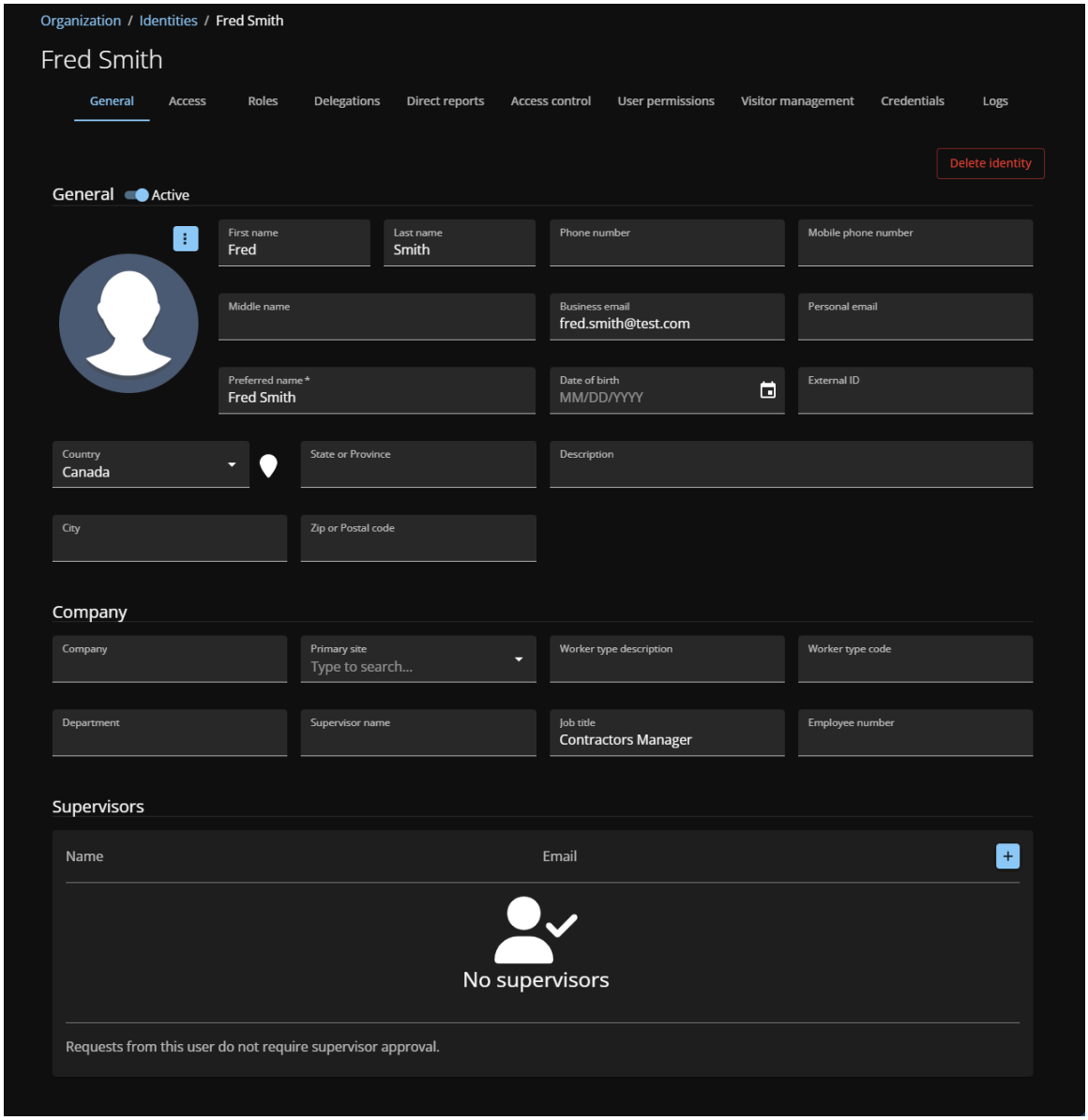
1 From the *Home* page, click **Organization** > **Identities**.

2 Select an option from the drop-down menu to display the identities that you require. Choose one of the following:

- **Active:** Displays active identities.
- **Inactive:** Displays inactive identities.
- **All:** Displays all active and inactive identities.

3 In the **Search** field, enter some search criteria and press enter.

4 Select an identity from the list to view the identity details.



5 In the **General** tab, review the identity details including any associated supervisors, and the identity status (active or inactive).

6 (Optional) Additional tabs are also provided to review other details and options associated with the selected identity as follows:

- **Custom fields:** Custom fields associated with the selected identity.
- **Access:** Access associated with the selected identity.
- **Roles:** Roles associated with the selected identity added by a provisioning policy or manually added.
- **Delegations:** Delegations associated with the selected identity.
- **Direct reports:** Reportees associated with the selected identity.
- **Access control:** Access control associated with the selected identity including extended grant time, cardholder activation, provisioning attributes, and associated cardholders.
- **User permissions:** Web portal user or administrator access permissions associated with the selected identity.
- **Visitor management:** List of sites where selected identity can invite visitors.
- **Credentials:** Synchronized credentials associated with the selected identity.

TIP: A credential synchronization can also be performed at the individual identity level. Select an identity then click the **Credentials** tab and click **Synchronize**.

- **Logs:** Identity event logs for activities associated with the selected identity.

After you finish

Modify your identities.

Modifying identities

After you have added identities, you might need to modify the identity details. You can deactivate or activate an identity, or modify identity details after a change in job title, department, company, supervisors, personal information, and so on.

Before you begin

Create your identities.

What you should know

- Only account administrators, supervisors, or identities or roles with the required permissions can modify identities.
- Only account administrators can delete identities.

IMPORTANT: If you make updates to identities that are synchronized with an external data source, your changes can be overwritten by the synchronization.

Procedure

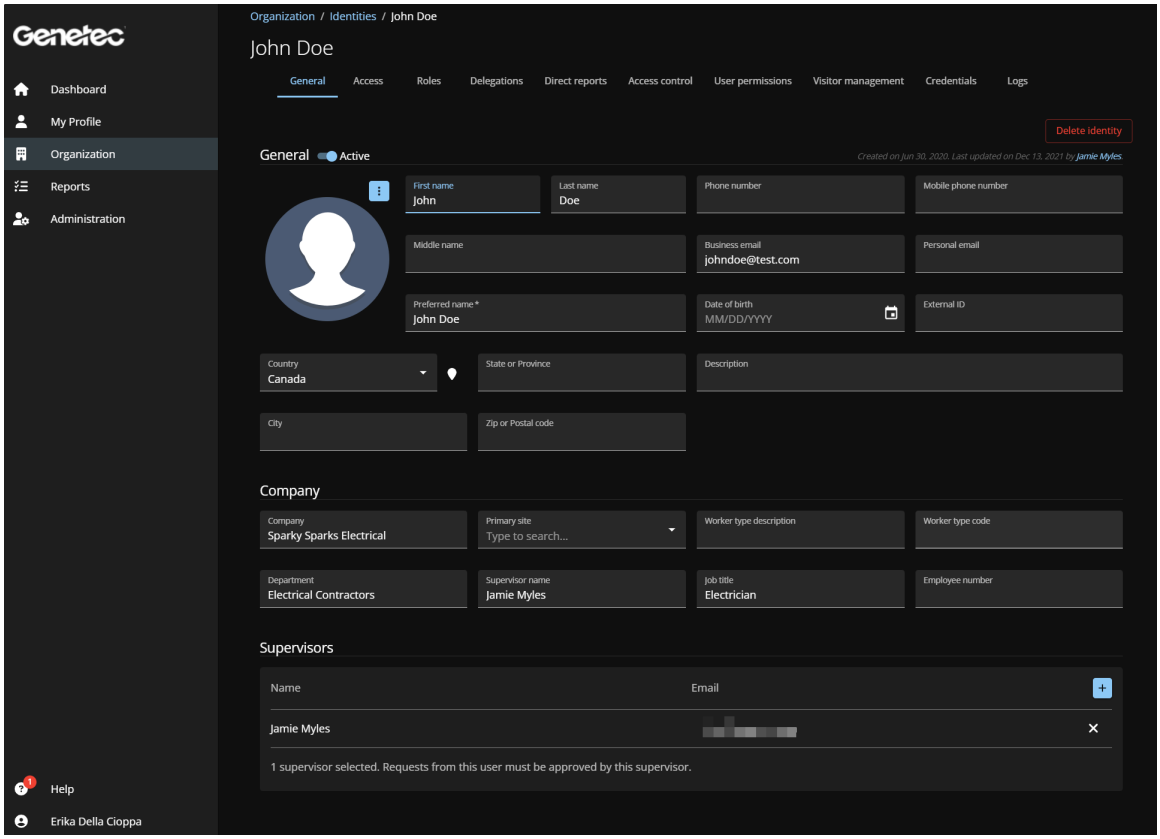
1 From the *Home* page, click **Organization** > **Identities**.

2 Select an option from the drop-down menu to display the identities that you require. Choose one of the following:

- **Active:** Displays active identities.
- **Inactive:** Displays inactive identities.
- **All:** Displays all active and inactive identities.

3 In the **Search** field, enter your search criteria and press enter.

4 Select an identity from the list to view the identity details.



5 Modify any settings, or deactivate or activate an identity as required.
For example, after a change in job title, department, company, supervisors, personal information, and so on.

6 Click **Save** to submit your changes.

After you finish

Delete Identities that are obsolete or no longer required.

Related Topics

Synchronizing identity pictures with Security Center on page 129

Deleting identities

An administrator can delete identities that have become obsolete or are no longer required. For example, when a person leaves the organization, or when an identity was created in error.

Before you begin

You must have identities that were previously created, that are now ready for deletion.

What you should know

Only account administrators can delete identities.

- Search functions and audit trail information are retained after an identity is deleted so that you can check when the person had their access removed and the reason.
- The identity is also removed from all associated approver, owner, or manager lists or identity requests if applicable.

Procedure

1 From the *Home* page, click **Organization** > **Identities**.

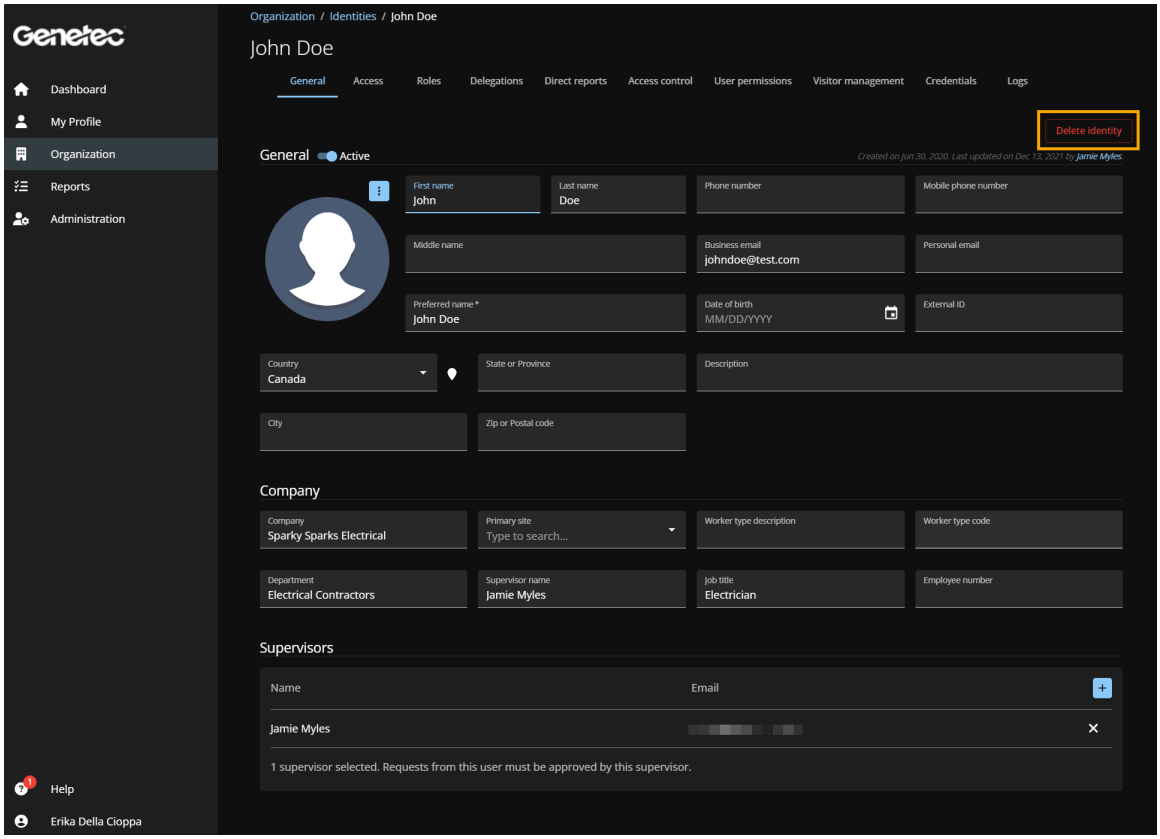
2 Select an option from the drop-down menu to display the identities that you require. Choose one of the following:

- **Active:** Displays active identities.
- **Inactive:** Displays inactive identities.
- **All:** Displays all active and inactive identities.

3 In the **Search** field, enter your search criteria and press enter.

4 Select an identity from the list to view the identity details.

5 Click **Delete identity**.



6 Click **Remove** to confirm the deletion.

Synchronizing identity pictures with Security Center

To manage identity and cardholder pictures in one place, *Account administrators* can set Genetec ClearID™ as the preferred data source for all cardholder pictures in Security Center.

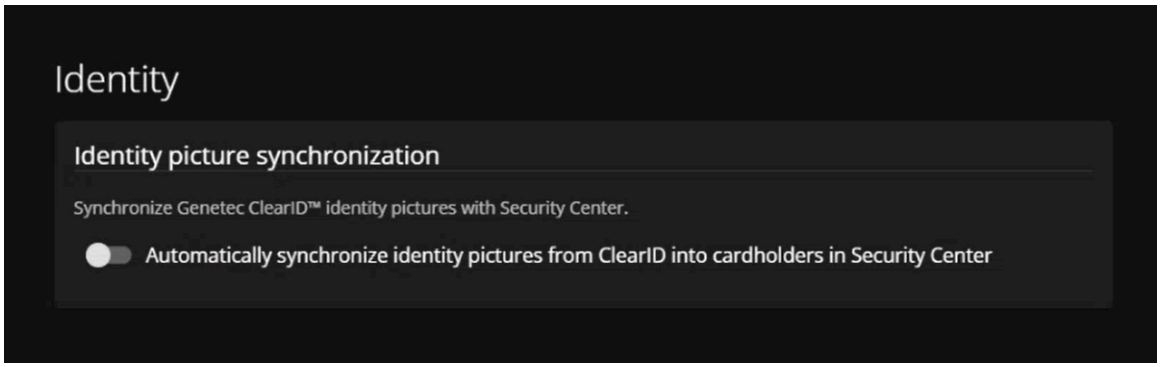
Before you begin

Ensure that Security Center is connected to ClearID.

Procedure

1 In the ClearID web portal, click **Administration** > **Account configuration**.

2 In the *Identity* section, turn on the **Identity picture synchronization** option.



3 ClearID identity pictures are automatically synchronized with Security Center, replacing existing cardholder pictures. If updates to cardholder pictures are made directly through Security Center after Identity picture synchronization is turned on, ClearID overrides these updates.

NOTE: If no identity pictures are found in ClearID when identity picture synchronization is first turned on, cardholder pictures in Security Center aren't replaced.

Related Topics

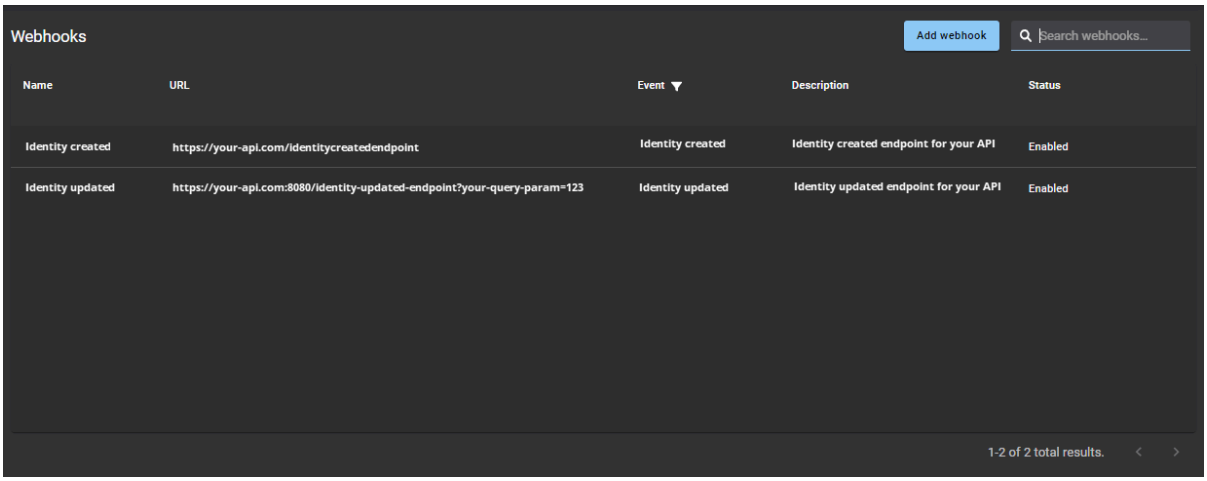
Connecting Security Center to ClearID on page 89
About cardholder and identity relationships on page 85
Reviewing cardholders and identities information on page 90
Modifying identities on page 125

About webhooks

A webhook is a user-defined HTTP callback. A webhook can be triggered by an event in a web application and can be used to send data or notifications to a third-party Application Programming Interface (API).

Webhooks in Genetec ClearID™

In ClearID, webhooks can be created and used to notify third-party APIs when specific events occur.



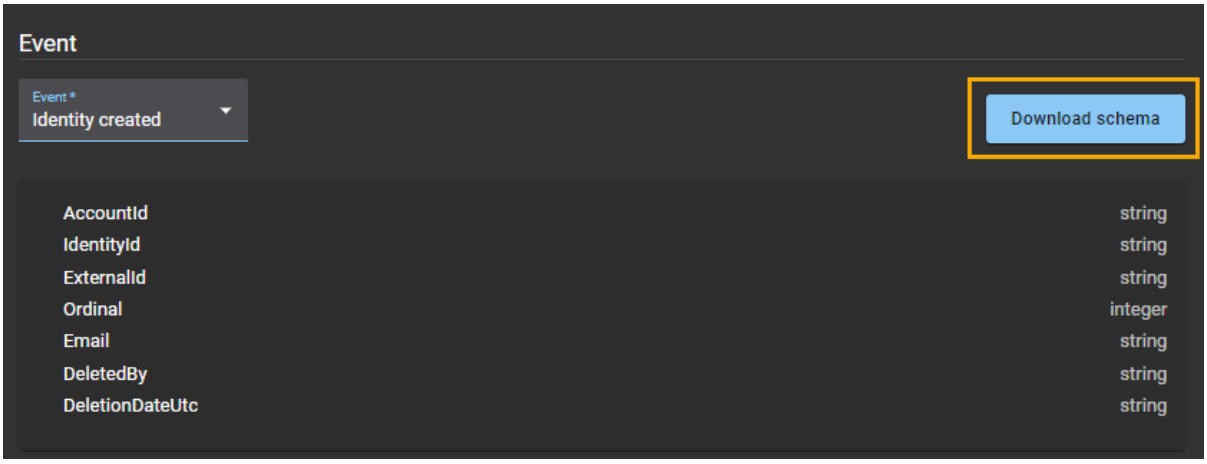
For example, an email notification with a link to detailed information about an identity could be sent when an **Identity updated** event occurs, or if you require other stakeholders to be notified after an **Identity requests created** or **Identity requests updated** event occurs.

Webhook processing

After the webhook is created, the webhook service listens for a subset of specified events coming from other ClearID services. When the specified event occurs the webhook service notifies the API specified in the *Webhook details* section **URL** field.

Webhook event schemas

The schema describes the object that is sent through the webhook and the contents of the schema vary depending on the event type specified. The webhook event schema can be downloaded from the *Event* section of the webhook to help understand the data structure of the events so that they can be retrieved and processed correctly on the user's side of the webhook integration.



For more information about downloading the schema, see Creating webhooks on page 133.

Webhook logs

Third-party API owners can use webhook logs to verify the status of every HTTP callback request sent to the third-party URL and to troubleshoot unreceived webhooks or other associated issues. For example, sender issues, receiver issues, and so on.

Webhook logs include the following:

- **Callback date:** When the callback was sent (includes date range filters).
- **URL:** The URL used to forward the webhook event notification to the relevant third-party API (program or application).
- **Response:** The response state indicates whether the HTTP callback was successfully received by third-party API or not. For example, accepted, bad request, internal server error, and so on.

NOTE: The webhook *Logs* section is only displayed at the end of the webhook details after the first callback has occurred.

Creating webhooks

You can create webhooks in Genetec ClearID™ to integrate with third-party solutions APIs so that you can notify interested parties when specific events occur.

Before you begin

Learn about webhooks.

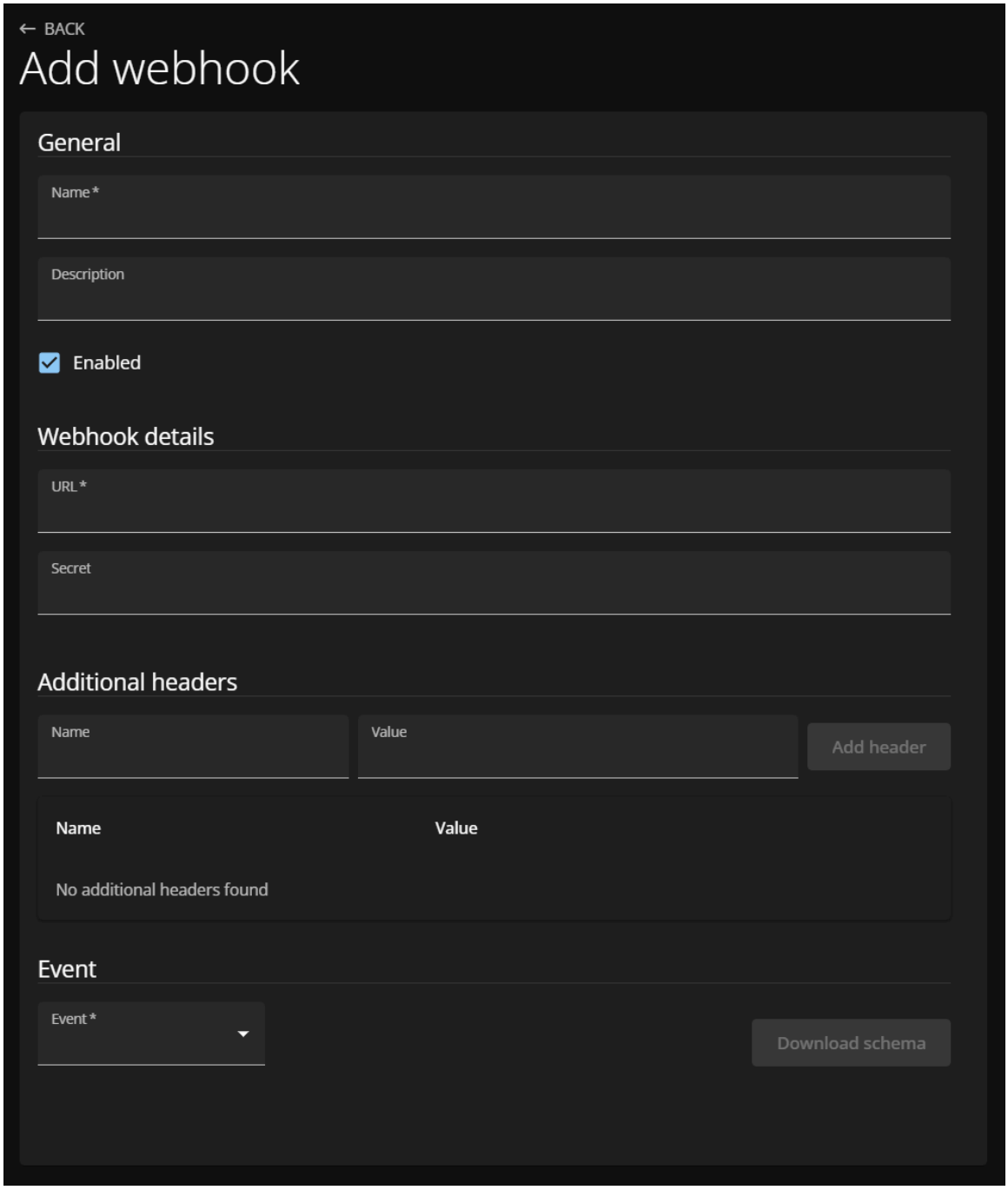
What you should know

- Only an account administrator can create webhooks in ClearID.
- External organizations are responsible for developing their own third-party solution APIs (programs or applications) that consume ClearID webhook HTTP callback notifications.

Procedure

1 From the *Home* page, click **Administration** > **Webhooks**.

2 Click **Add webhook**.



3 In the *General* section, complete the fields:

a) (Optional) Select the **Enabled** checkbox to enable the webhook.

NOTE: When the webhook is *disabled*, the HTTP callback doesn't happen.

b) In the **Name** field, enter a meaningful `Name` so that you can easily identify your webhook later on.

For example, **Identity updated** or **Identity requests created webhook** and so on.

c) In the **Description** field, enter a `Description` that describes the purpose of the webhook.

For example, what the webhook is for, and what API (program or application) it notifies when events occur.

4 In the *Webhook details* section, complete the fields:

a) Enter a valid *HTTPS://* URL for your API (program or application).

URLs can include ports and query parameters as follows:

- Example 1: *https://my-api.com/identityupdatedendpoint*
- Example 2: *https://my-api.com:8080/identity-updated-endpoint?my-query-param=123*

This URL is used to forward the webhook event notification to the relevant third-party API (program or application).

NOTE: Your organization is responsible for providing the URL that you want the webhook event notifications forwarded to.

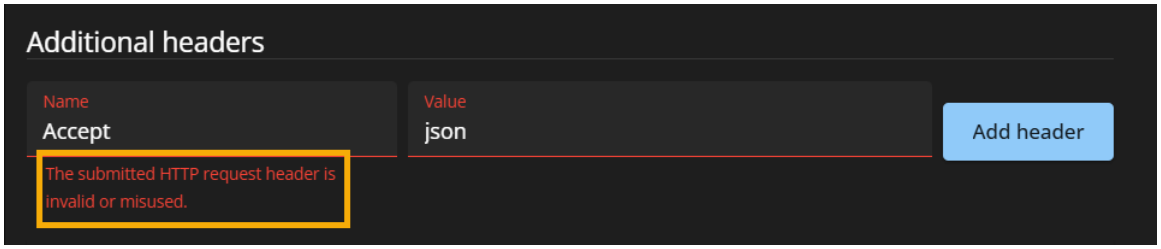
b) (Optional) Enter the `Secret` (App key) if required by the third-party API.

The secret (App key) is used to authenticate communications between the ClearID webhook and your organizations third-party API.

5 (Optional) In the *Additional headers* section, complete the fields:

Extra custom HTTP headers can be added in the HTTP callback request. These custom headers can be used by the third-party API on the user's side of the integration.

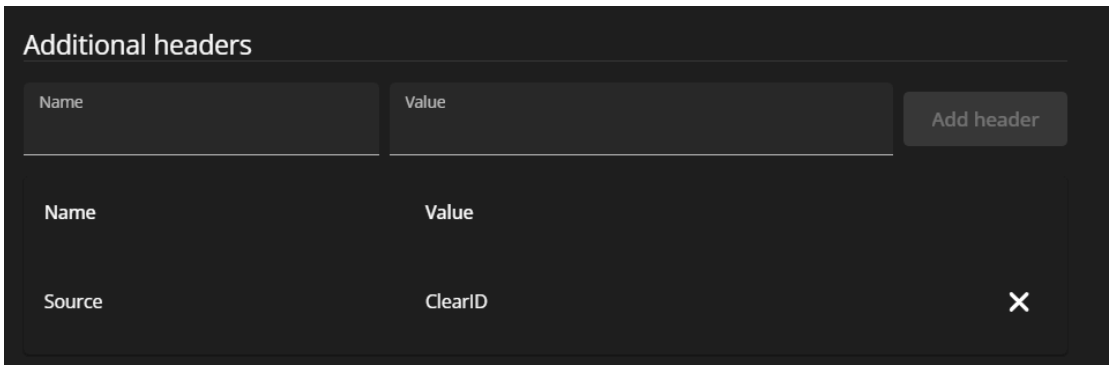
NOTE: If you enter an invalid or reserved header, the following message is displayed The submitted HTTP request header is invalid or misused.



a) Enter the header parameter `Name`.

For example, if you had one event coming from multiple sources, extra HTTP request headers could be used to specify where event is coming from (ClearID or external API).

Example:



b) Enter the header parameter `Value`.

c) (Optional) Click **Add header** to add extra HTTP request headers as required.

For example, if your API is expecting or requires a specific set of headers (Host, Origin, Language, and so on).

d) (Optional) Click ✕, to remove any headers that are no longer required.

6 In the **Event** section, configure the settings you require:

a) From the **Event** list, select an event that you want this webhook to listen for.

b) Click **Download schema** and follow your browser prompts.

BEST PRACTICE: Use the downloaded schema information to understand the data structure of the events so that they can be retrieved and processed correctly on the user's side of the integration.

The following example shows an extract from a *schema-identitycreated.json* file:

```
{
  "$schema": "http://json-schema.org/draft-04/schema#",
  "title": "IdentityDeletedCallbackModel",
  "type": "object",
  "additionalProperties": false,
  "required": [
    "AccountId",
    "IdentityId",
    "DeletedBy",
    "DeletionDateUtc"
  ],
  "properties": {
    "AccountId": {
      "type": "string",
      "description": "The account id for which this identity is member of.",
      "minLength": 1
    },
    "IdentityId": {
      "type": "string",
      "description": "A unique id to identify the identity.",
      "minLength": 1
    },
    "ExternalId": {
      "type": [
        "null",
        "string"
      ],
      "description": "External ID"
    },
    "Ordinal": {
      "type": [
        "integer",
        "null"
      ],
      "description": "Commit ordinal in the storage.",
      "format": "int64"
    },
    "Email": {
      "type": [
        "null",
        "string"
      ],
```

7 Click **Save**.

Your webhook is now configured to integrate with a third-party API (program or application) to notify interested parties when specific events occur.

After you finish

Using the downloaded schema, configure your third-party API to receive and process the webhook notifications.

Modifying webhooks

After you have created your webhooks, you might need to modify the webhook details. You can deactivate or activate a webhook, and modify the webhook details or event type if required.

Before you begin

Create your webhooks.

What you should know

Only an account administrator can modify webhooks in Genetec ClearID™.

Procedure

1 From the *Home* page, click **Administration** > **Webhooks**.

2 Select the webhook that you want to modify.

TIP: If the list is long, use the **Search** field to find the webhook that you require.

3 In the *General* section, modify the fields as required.

a) (Optional) Move the **Enabled** slider to enable or disable the webhook.

NOTE: When the webhook is *disabled*, the HTTP callback does not happen.

4 In the *Webhook details* section, modify the fields as required:

5 (Optional) In the *Additional headers* section, modify the fields as required:

6 In the *Event* section, modify the settings as required.

7 Click **Save**.

Viewing webhook logs

To troubleshoot unreceived webhooks or other associated issues, third-party Application Programming Interface (API) owners can use the webhook logs to verify the status of every HTTP callback request sent to the third-party URL.

Before you begin

Create your webhooks.

What you should know

- Only an account administrator or third-party API owner can view webhook logs in Genetec ClearID™.
- The webhook *Logs* section is only displayed at the end of the webhook details after the first callback has occurred.

Procedure

1 From the *Home* page, click **Administration** > **Webhooks**.

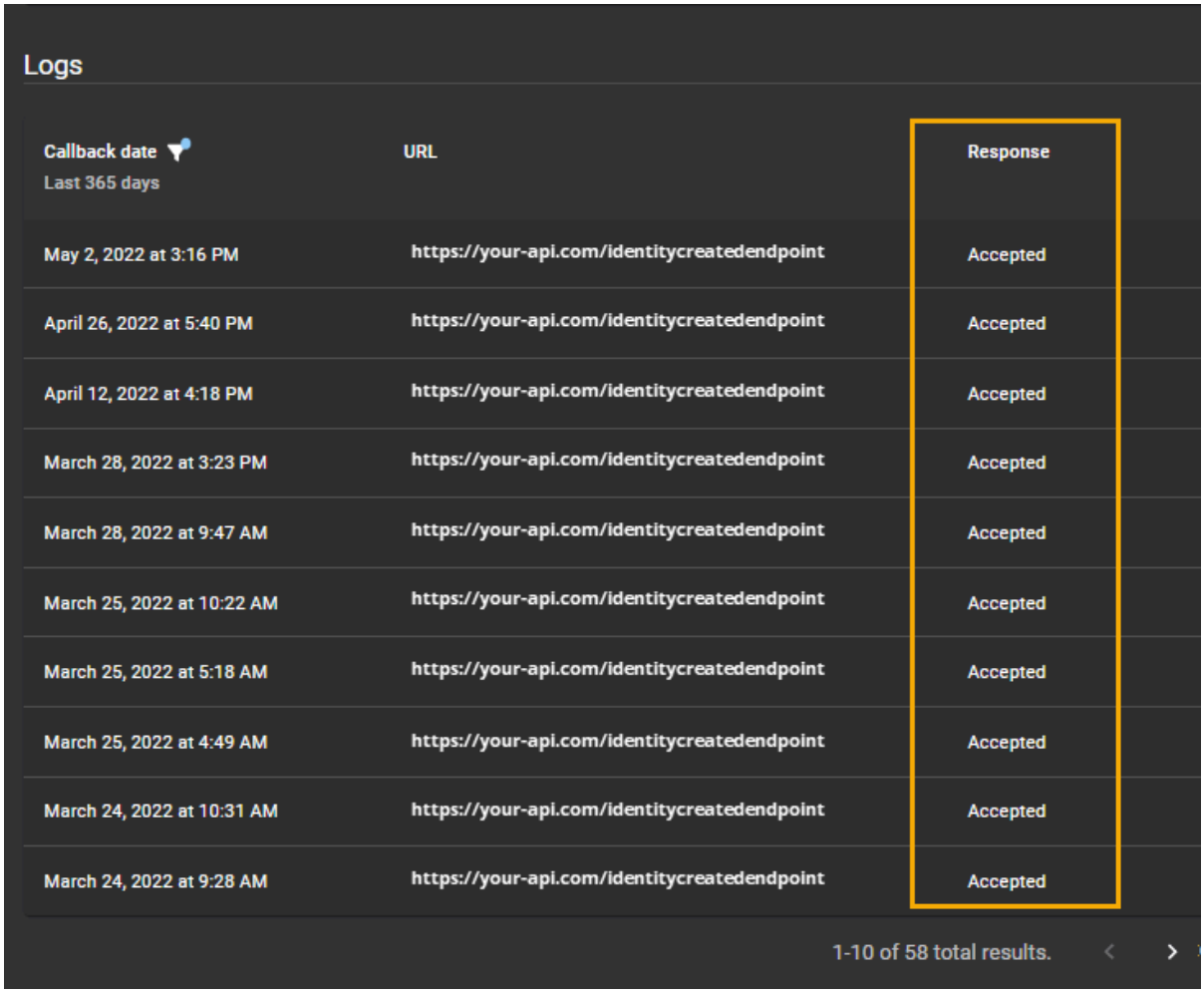
2 Select the webhook that you want to troubleshoot.

TIP: If the **Webhooks** list is long, you can use the **Search** field to find the webhook that you require.

3 In the *Logs* section **Callback date** column, click to select a specified range or use the **Date range** picker to specify your own range.

NOTE: The callback data range time period is limited to a maximum of 1 year and the callback information is displayed in reverse chronological order.

The following image shows callback logs containing *Accepted* responses.



The following image shows callback logs containing *BadRequest* responses.

4 Review the **Logs** information as follows:

a) In the **Callback date** column, check when the callback was sent (includes date range filters).

b) In the **URL** column, verify the URL used to forward the webhook event notification that a specified event occurred to the relevant third-party API (program or application).

c) In the **Response** column, review the states to verify whether the HTTP callback was received successfully by third-party API or not. For example, **Accepted**, **BadRequest**, **InternalServerError**, and so on.

d) (Optional) Navigate through the callback logs (forwards or backwards in time) by clicking the **Next page** or **Previous page** icons.

Granting access to the web portal

Before a user can access the Genetec ClearID™ web portal, you must grant them the required *User* or *Administrator* permissions for the website.

Before you begin

The identity that you want to grant access to must exist in the system.

What you should know

- To grant *User* or *Administrator* permissions for the website, you must be an account administrator.

Procedure

- Choose one of the following:
  - Grant user access to the web portal
  - Grant administrator access to the web portal

The selected identity now has access to the web portal with either **User** or **Administrator** privileges.

After you finish

Log on to the web portal.

Related Topics

Viewing sites where a user can invite visitors on page 262

Granting user access to the web portal

Before a user can access the Genetec ClearID™ web portal, you must grant them the required permissions for the website.

Before you begin

The identity that you want to grant access to must exist in the system.

What you should know

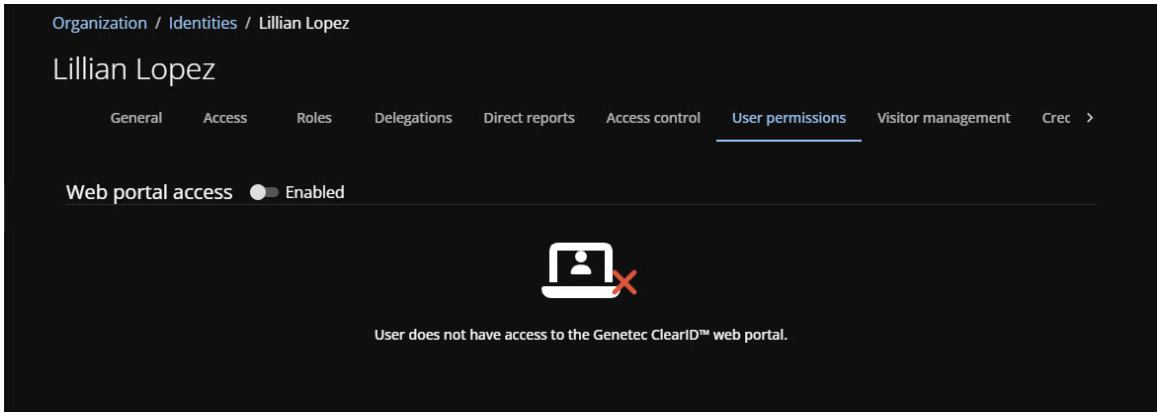
- To grant user permissions for the website, you must be an account administrator.

Procedure

1 Click **Organization** > **Identities**.

2 Search for a user or select one from the Identities list.

3 Click **User permissions**.



4 In the *User permissions* section, click or move the **Web portal access** slider to **Enabled** to grant access to the web portal.

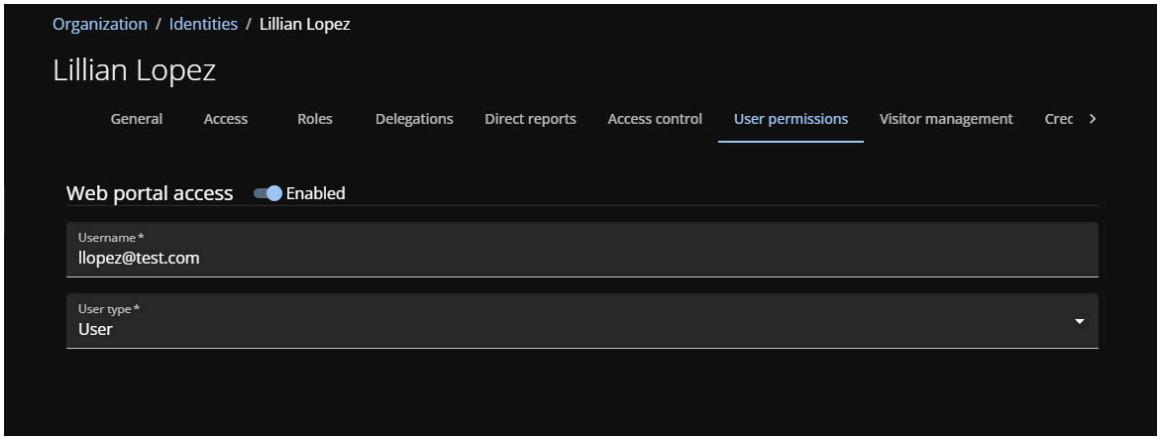
If the slider is disabled the identity cannot access the web portal.

NOTE: Some organizations do not enable web portal access for some or all of their identities because their organization does not require employee requests or web portal access.

5 In the **Username** field, enter a valid email address.

6 In the **User type** list, select **User** for default user access to the web portal.

7 Click **Save** to confirm your changes.



The selected identity now has access to the web portal with the default **User** privileges.

Example

Watch this video to learn more. Click the **Captions** icon (**CC**) to turn on video captions in one of the available languages.

After you finish

Log on to the web portal.

Granting administrator access to the web portal

Before an administrator can access the Genetec ClearID™ web portal, you must grant them the required permissions for the website.

Before you begin

The identity that you want to grant access to must exist in the system.

What you should know

- To grant administrator permissions for the website, you must be an account administrator.

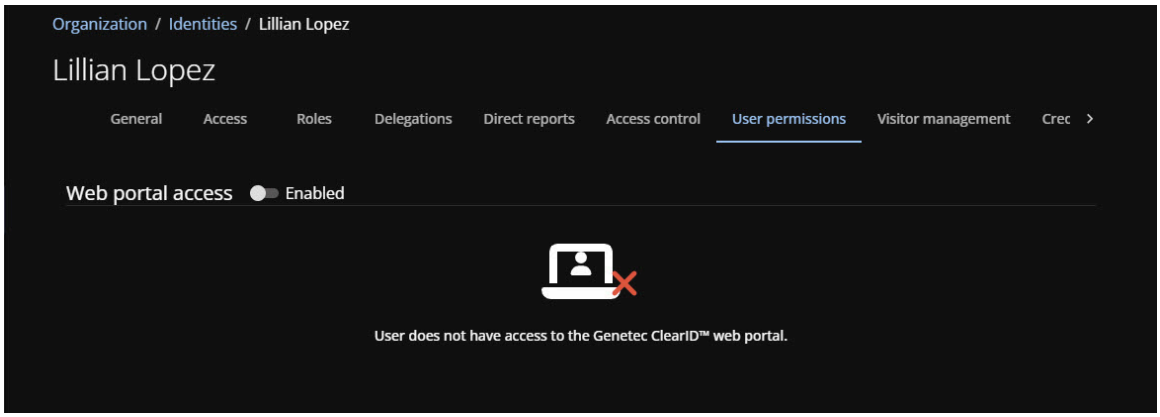
IMPORTANT: When a new account is created, an end user designated as the account administrator will receive a Welcome to Genetec ClearID™ and a New ClearID Account - ACCOUNTNAME email notification. By default, Administrator access is given to the end user that receives the email. If a system integrator or other identity also requires administrator access, their administrator access must be added by the end user (account administrator).

Procedure

1 Click **Organization** > **Identities**.

2 Search for a user or select one from the Identities list.

3 Click **User permissions**.



4 In the *User permissions* section, click or move the **Web portal access** slider to **Enabled** to grant access to the web portal.

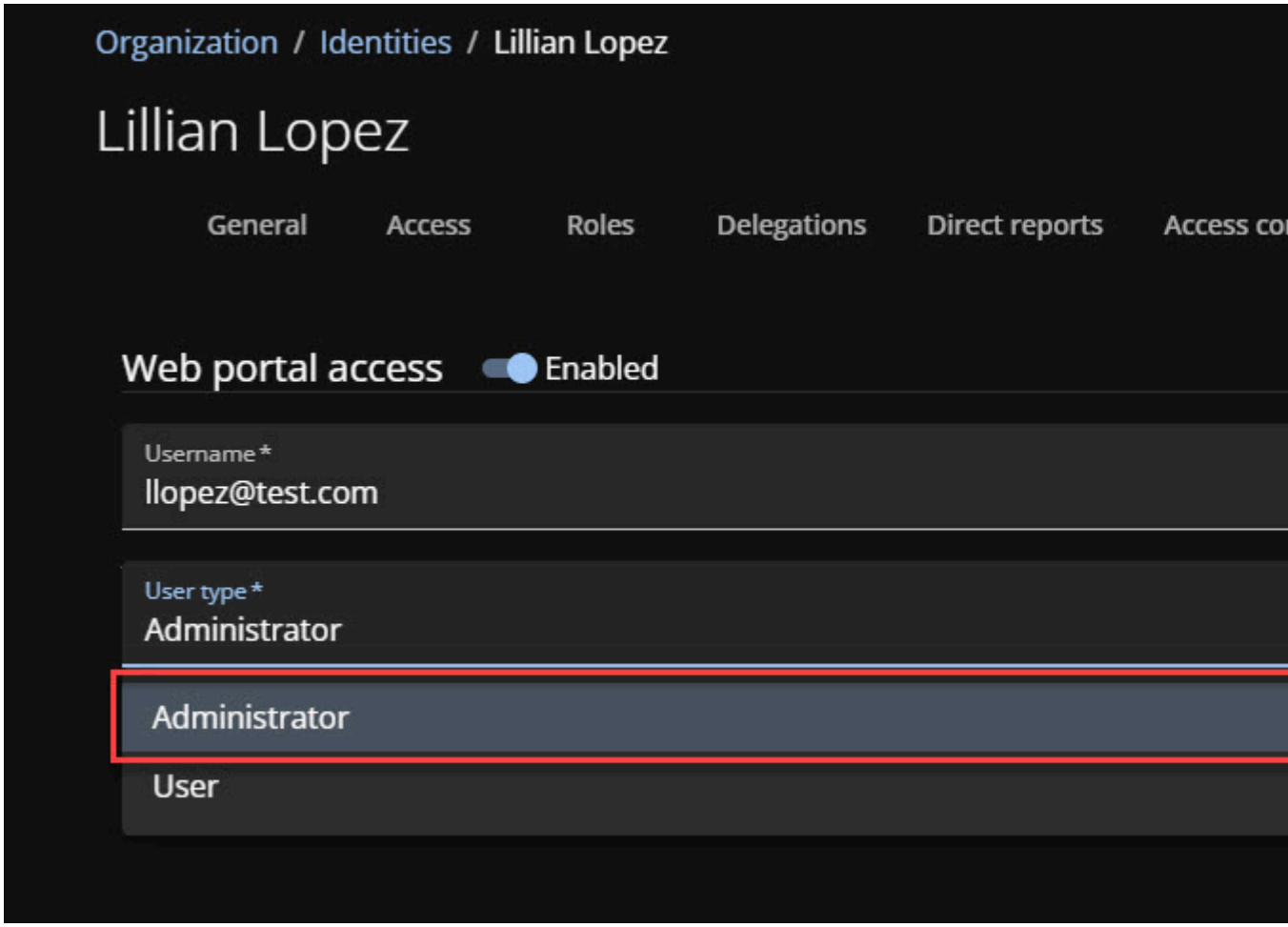
If the slider is disabled the identity cannot access the web portal.

NOTE: Some organizations do not enable web portal access for some or all of their identities because their organization does not require employee requests or web portal access.

5 In the **Username** field, enter a valid email address.

6 In the **User type** list, select **Administrator** for Administrator access to the web portal.

7 Click **Save** to confirm your changes.



The identity now has access to the web portal with **Administrator** privileges.

Example

Watch this video to learn more. Click the **Captions** icon (**CC**) to turn on video captions in one of the available languages.

After you finish

Log on to the web portal.

Viewing your profile

You can use the *Profile* page to view your profile and check your access or role membership in Genetec ClearID™.

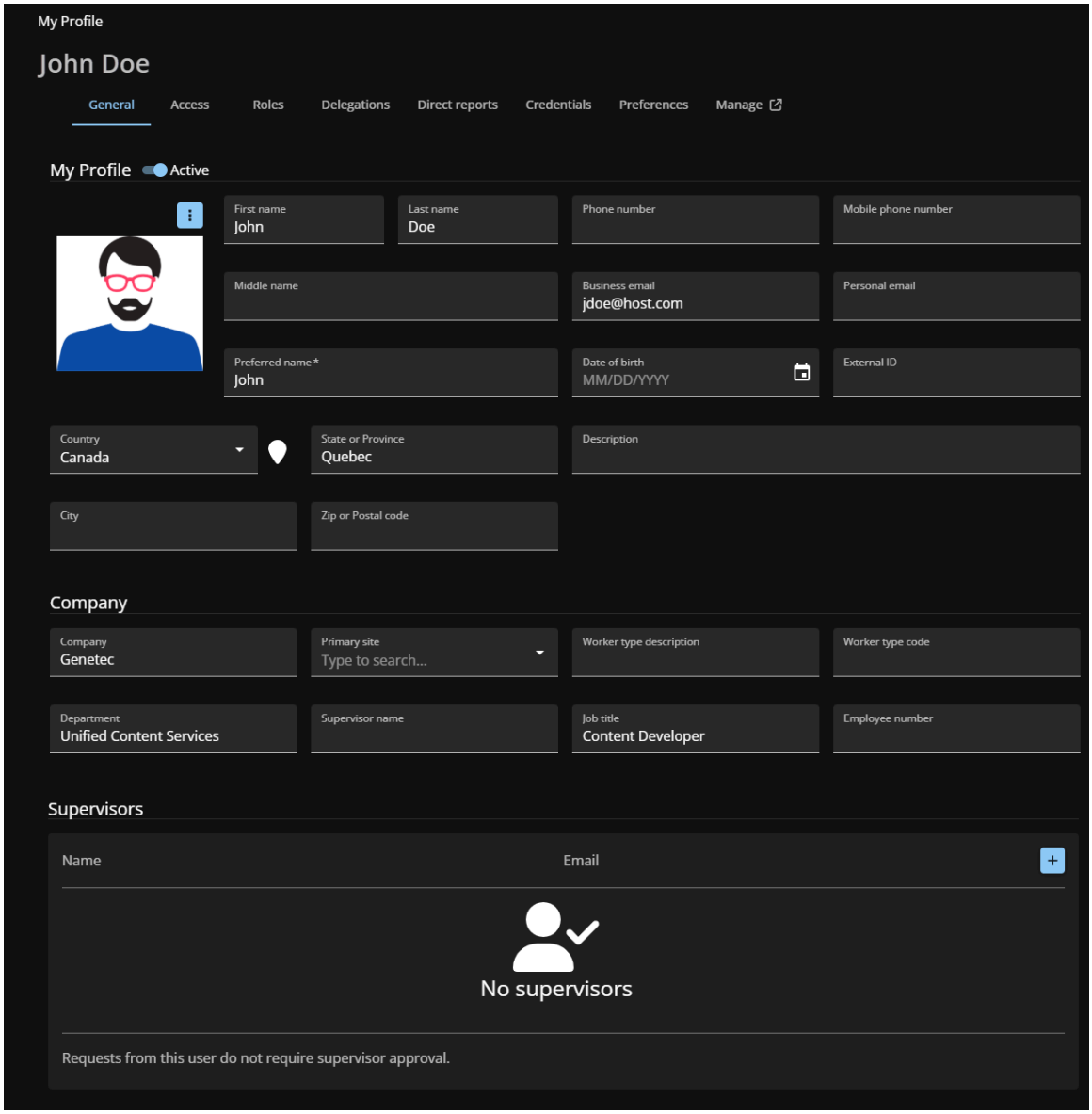
What you should know

- The profile in ClearID is displayed to the employee in a read-only view and can't be modified. The profile contains the site, worker type description, supervisor name, and other information.
- An *employee* can check their profile at any point in time to understand what information ClearID stores about them. They can also see if the information is outdated and request an update.

TIP: Check your department or job title after a job change to ensure that you have the correct access.

Procedure

1 From the homepage, click **My Profile**.



2 In the **General** tab, review your identity details including any associated supervisors, and the identity status (active or inactive).

3 (Optional) Additional tabs are also provided to review other details and options associated with your identity as follows:

- **Custom fields:** Custom fields associated with your identity.
- **Access:** Access associated with your identity.
- **Roles:** Roles associated with your identity added by a provisioning policy or manually added.
- **Delegations:** Delegations associated with your identity.
- **Direct reports:** Reportees associated with your identity.
- **Access control:** Access control associated with your identity including extended grant time, cardholder activation, provisioning attributes, and associated cardholders.
- **User permissions:** Web portal user or administrator access permissions associated with your identity.
- **Visitor management:** List of sites where your identity can invite visitors.
- **Credentials:** Synchronized credentials associated with your identity.
- **Logs:** Identity event logs for activities associated with your identity.

After you finish

View your site and area access.

Configuring your portal theme preferences

You can customize your Genetec ClearID™ portal theme to match your personal preferences by choosing between light or dark mode.

What you should know

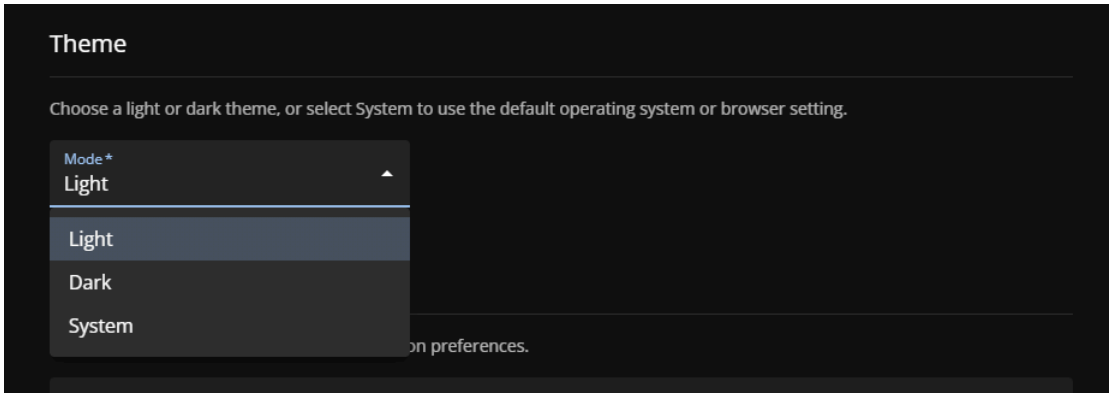
Your theme preferences only apply to your user profile. If you don't configure a personal theme, your theme matches the portal theme configured by the *Administrator*.

Procedure

1 In the ClearID web portal, click **My Profile** > **Preferences**.

2 In the *Theme* section, configure your theme preferences.

a) From the **Mode** list, choose between **Light**, **Dark**, and **System**.

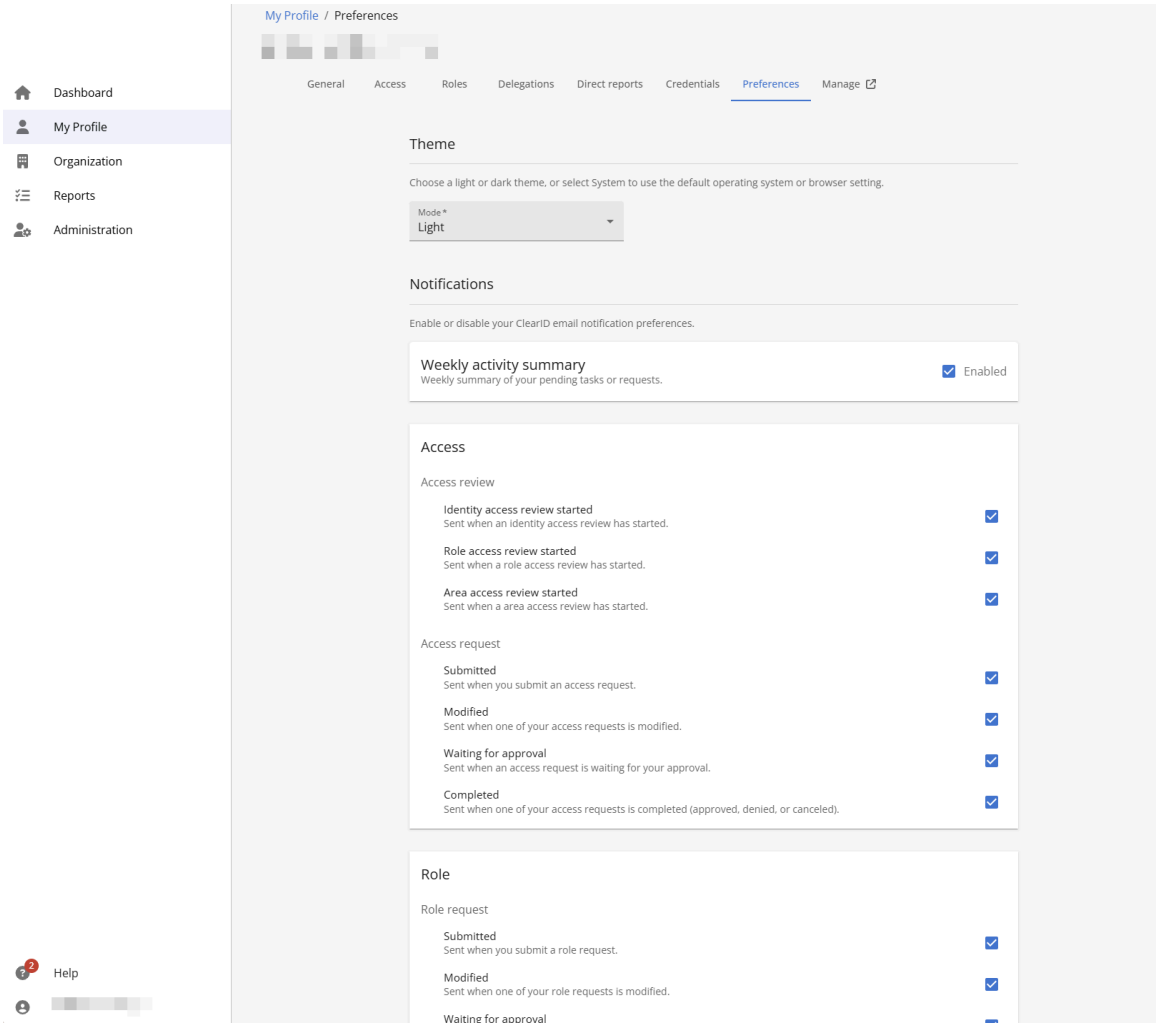


NOTE: Selecting **System** uses your default operating system or browser settings.

3 Click **Save**.

Example

The ClearID portal of a user with light mode selected:


My Profile / Preferences
Dashboard
My Profile
Organization
Reports
Administration
Help
General
Access
Roles
Delegations
Direct reports
Credentials
Preferences
Manage
Theme
Choose a light or dark theme, or select System to use the default operating system or browser setting.
Mode*
Light
Notifications
Enable or disable your ClearID email notification preferences.
Weekly activity summary
Weekly summary of your pending tasks or requests.
Enabled
Access
Access review
Identity access review started
Sent when an identity access review has started.
Role access review started
Sent when a role access review has started.
Area access review started
Sent when a area access review has started.
Access request
Submitted
Sent when you submit an access request.
Modified
Sent when one of your access requests is modified.
Waiting for approval
Sent when an access request is waiting for your approval.
Completed
Sent when one of your access requests is completed (approved, denied, or canceled).
Role
Role request
Submitted
Sent when you submit a role request.
Modified
Sent when one of your role requests is modified.
Waiting for approval

Viewing your site and area access

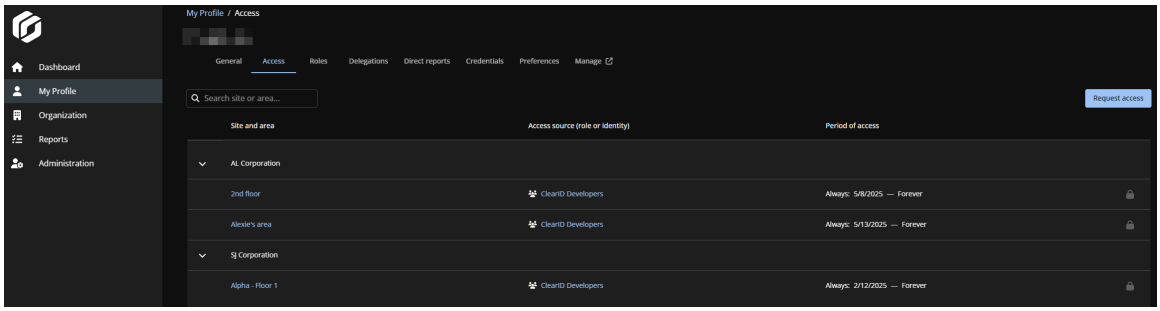
You can use the Profile *Access* page to review your site and area access. This information can be used to help you identify if you need to request more access in your main site or other sites.

What you should know

The *Access* page displays all sites and areas that the logged in user has access to and includes the access source and the period of access.

Procedure

1 From the *Home* page, click **My Profile** > **Access**.



The sites and areas you have access to are displayed in the **Site and area** column.

2 (Optional) Click the blue text in the **Site and area** column to jump to the *Access* page.

3 (Optional) Click the blue text in the **Access source** column to jump to the *Roles* page.

After you finish

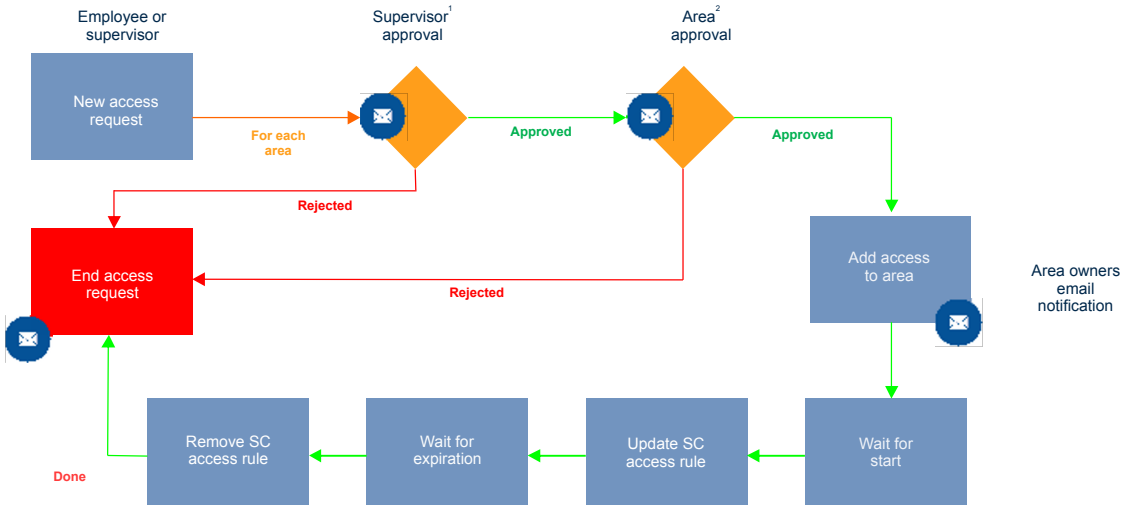
Submit access requests for other areas as required.

About access request workflow

An access request workflow is a series of activities performed by the system or authorized people during the life cycle of an access request. The activities can change the state and properties of access requests, affect other entities in the system, or wait for a condition to be met.

The workflow helps automate access request tasks, such as approving or rejecting access requests, so that people involved in the review and approval process can focus on other tasks.

The following diagram illustrates the *access request workflow* that occurs in Genetec ClearID™ and Synergis™.



[1] (Optional) Supervisor approval can be enabled for the area.

[2] (Optional) Area approval can be enabled for the area.

NOTE: By default, access requests are limited to the minimum access required. This limits what a user can do with an access card.

Related Topics

About workflows on page 12

Requesting access

To request access for yourself, another identity, or a team member, you can use the Genetec ClearID™ self-service portal. Using a self-service portal with area managers specified simplifies the approval process, and avoids interrupting a chain of people who might or might not be the correct approvers.

Before you begin

- Familiarize yourself with workflows.

What you should know

Employees, managers, and supervisors of different secure areas can request access for themselves or their employees using a self-service Web portal.

NOTE: In the past, most sites access control solutions would typically not track or record why access was required.

In ClearID, the access request includes: who requested access, site, area, when, and why the access is required.

- Separate access requests and approval workflows are created for each request for access to an area.
- After the request summary is confirmed, it's automatically assigned to the right individuals for approval.
- After the approval process occurs, the requester receives an email notifying them whether the access request was approved or rejected.

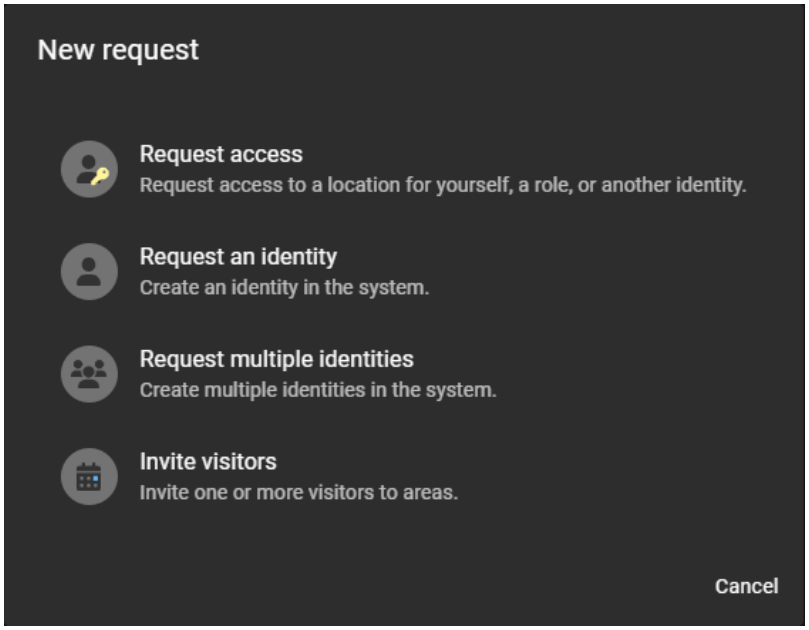
Procedure

1 Log on to the self-service portal.

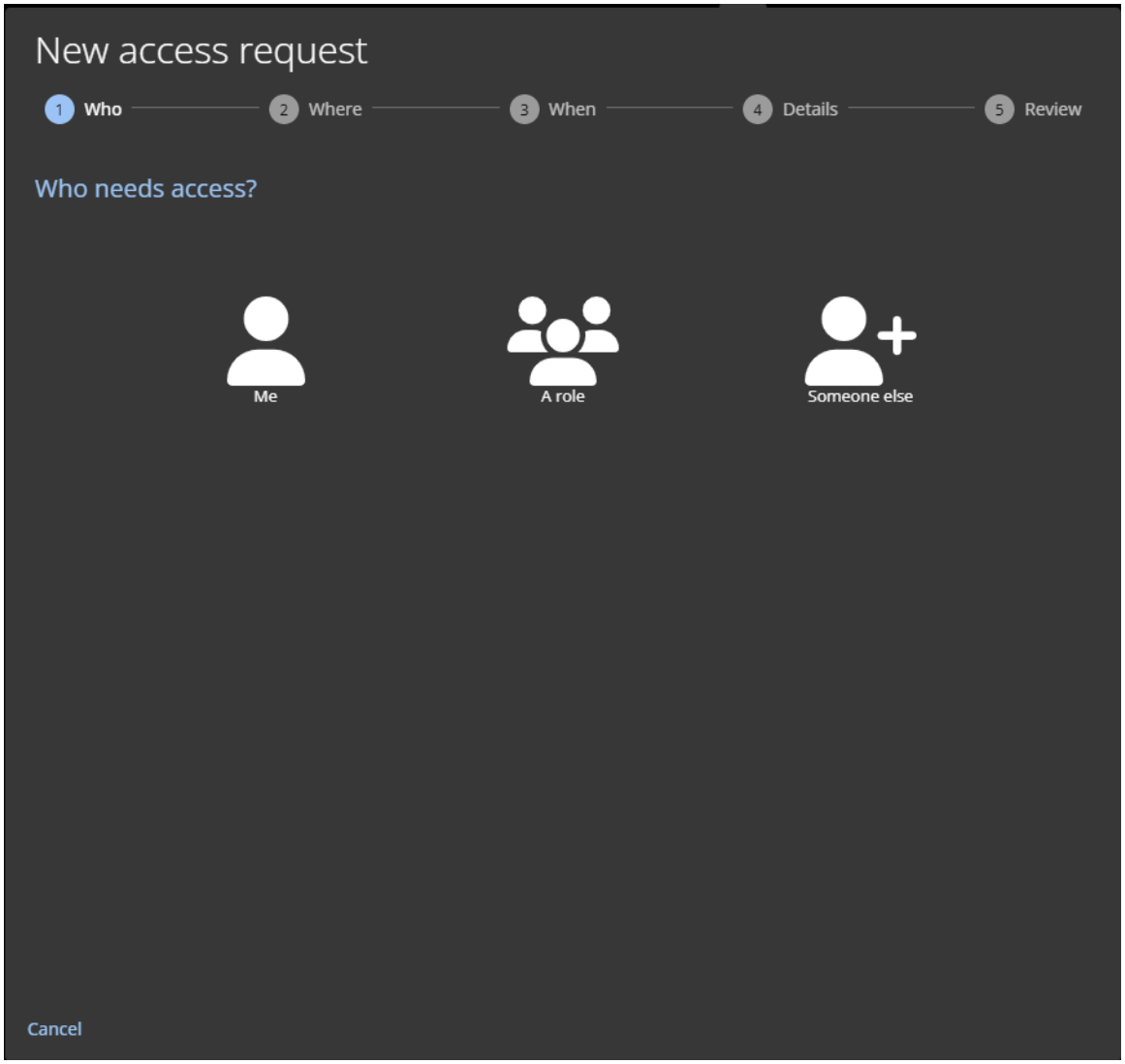
2 Click **Dashboard** > **My requests**.

3 Click **New request**.

4 In the **New request** dialog, click **Request access**.



5 In the *Who* section of the *New access request* dialog, click an option to choose who needs access:



a) (Optional) If you selected **Me**, the *New access request* wizard is automatically updated to include the information of the currently logged in user.

b) (Optional) If you selected **A role**, search for or select a role from the list.

The *New access request* wizard is updated to include the information of the selected role.

IMPORTANT: Only a *role owner* or *role manager* can view and request access for roles. They can only request access for the roles that they manage.

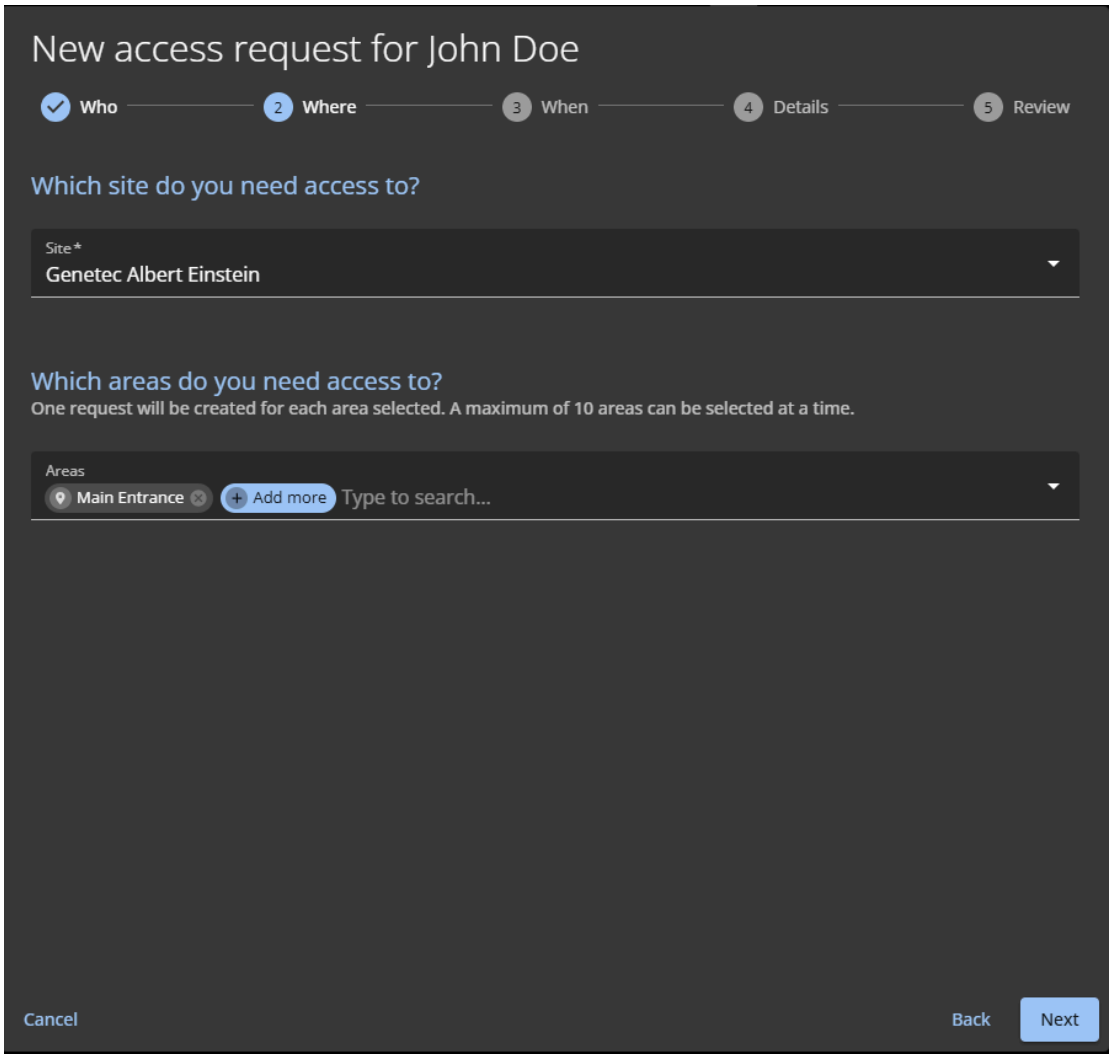
c) (Optional) If you selected **Someone else**, search for or select an individual from the list.

The *New access request* wizard is updated to include the information of the selected individual.

NOTE: A supervisor or team leader can request access for someone in their team, group, or department.

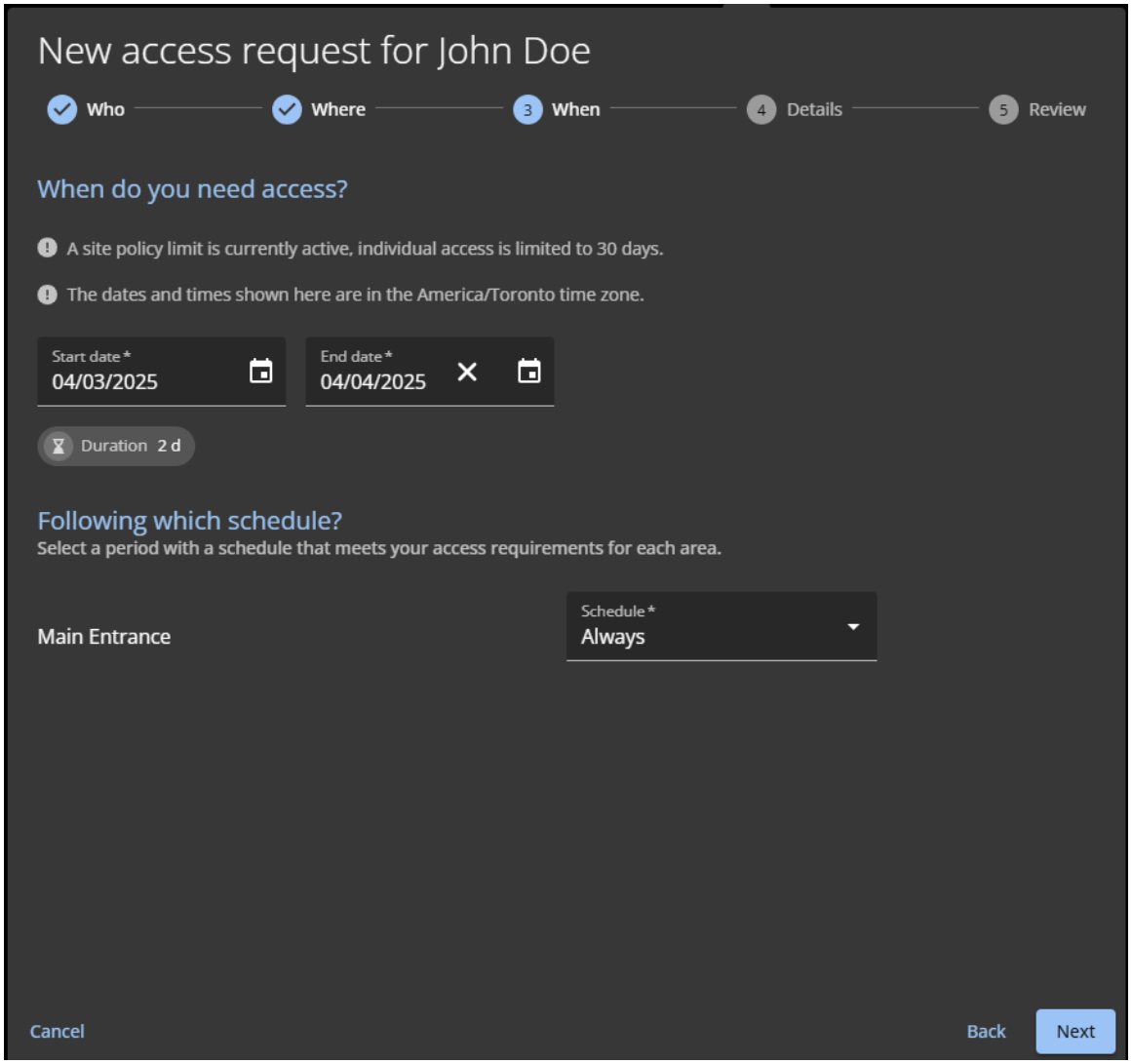
6 In the *Where* section of the *New access request* dialog, select a site from the site list.

a) Search for or select one or more areas and click **Next**.



NOTE: Only areas created with **Public** visibility are shown in this list.

7 In the *When* section of the *New access request* dialog, enter the dates that you require or select them using the calendar picker.



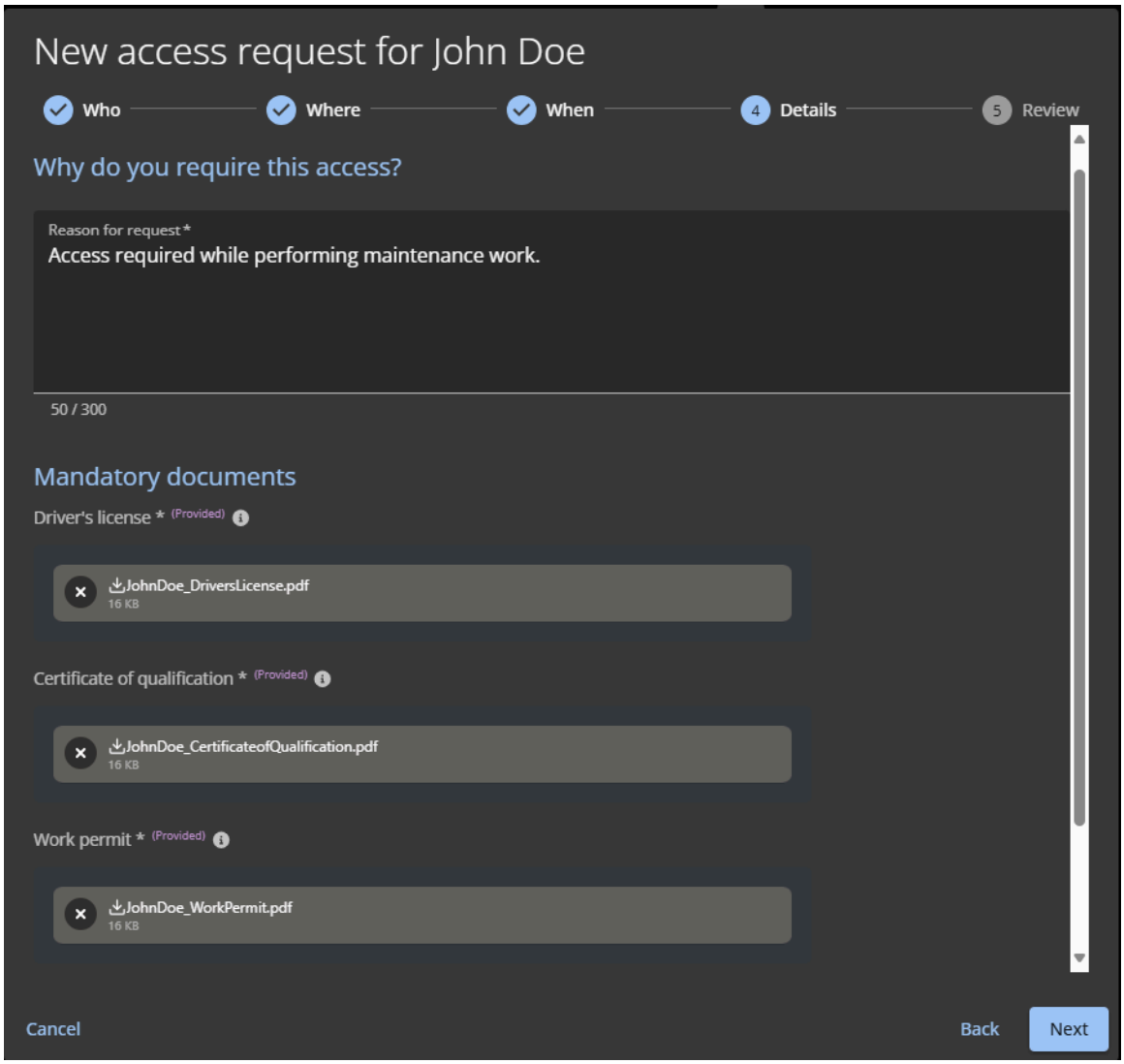
a) Select the schedule that you require for each area and click next.

IMPORTANT: If a site access duration has been enabled, you can't select a duration that exceeds the maximum limit specified in the site access configuration.

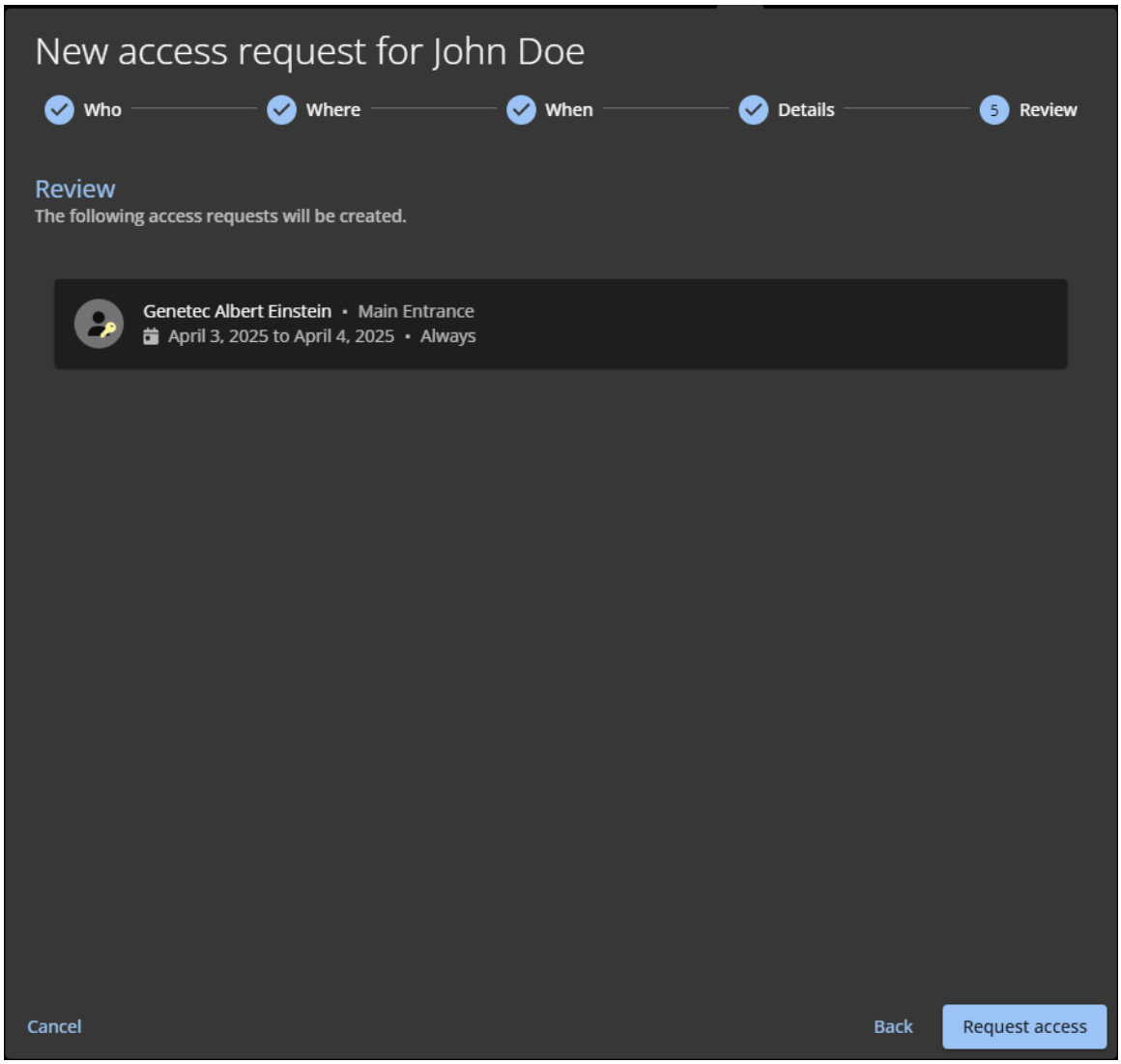
8 In the *Details* section of the *New access request* dialog, enter the reason for the access request.

NOTE: The **Reason for request** is a required field and the reason is stored for access review auditing purposes.

a) Upload any supporting documents to the access request and click **Next**.



9 Review the request summary.

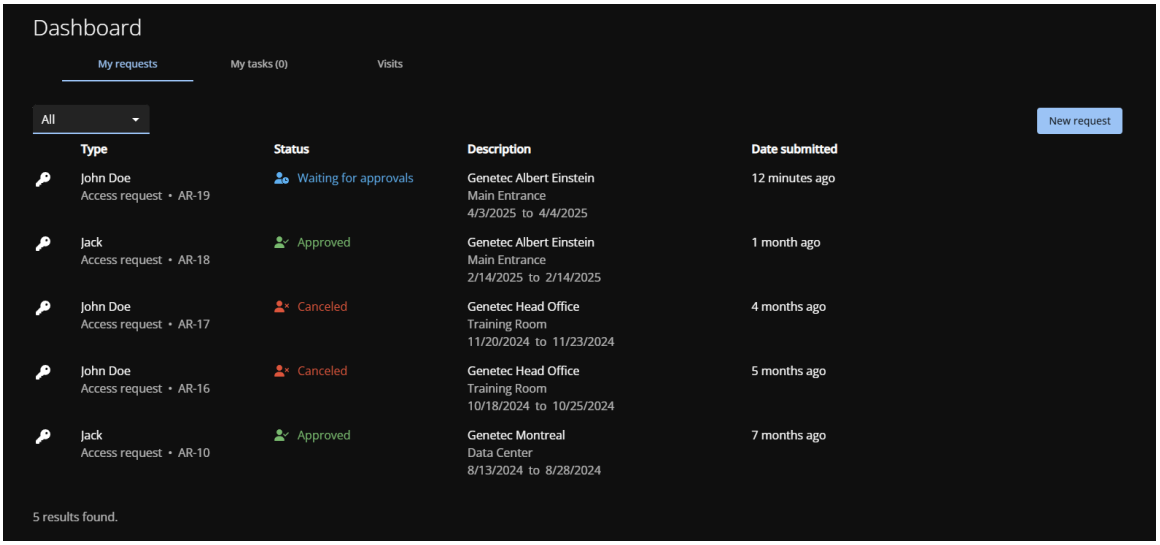


a) If changes are required, click **Back** and modify the settings.

b) If the information is correct, click **Request access** to submit the access request.

c) Click **Finish** to return to *My requests*.

Your access request has been submitted and is waiting for the required approvals. Depending on your setup, the request is either automatically approved or waiting for the required approvals. In some situations, the access request might also be manually or automatically canceled or rejected.



Example

After you finish

Confirm whether the request was approved or rejected:

- Check your email for an *Access approved* email.
- Check **My requests** in ClearID.

Related Topics

Setting a maximum duration for site access on page 265
About email notifications on page 180
Checking the status of access requests on page 319
Access Request Feature Note (2 pages)

Adding supervisors manually

To help manage requests from your direct reports, you can manually add supervisors to the relevant identity profiles so that the supervisor approval workflow can be used.

Before you begin

Create your identities.

What you should know

This procedure is for Supervisors who have direct reports.

- To manually add supervisors to identity profiles, you must be an account administrator.

Procedure

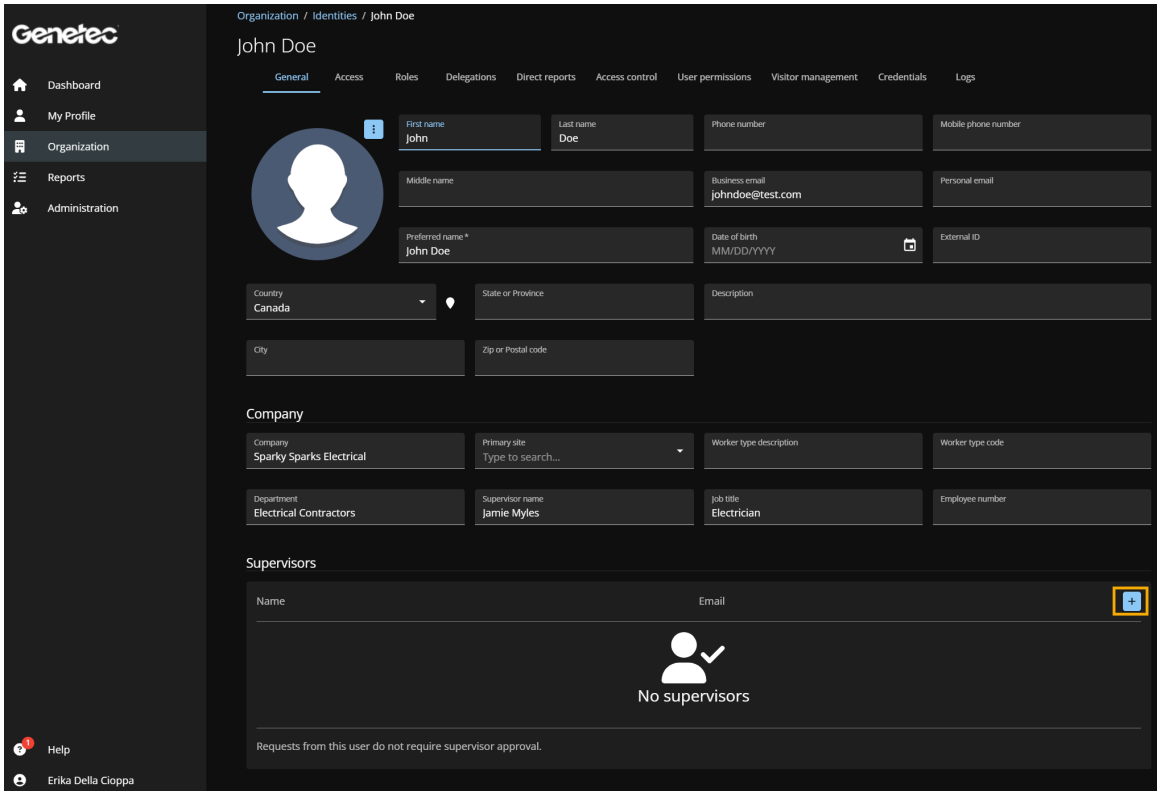
1 From the homepage, click **Organization** > **Identities**.

2 Search for or select an identity from the list.

a) (Optional) Use the **Active**, **Inactive**, or **All filters** to narrow your search.

3 Click the identity that you require.

4 In the **Supervisors** section, click +.



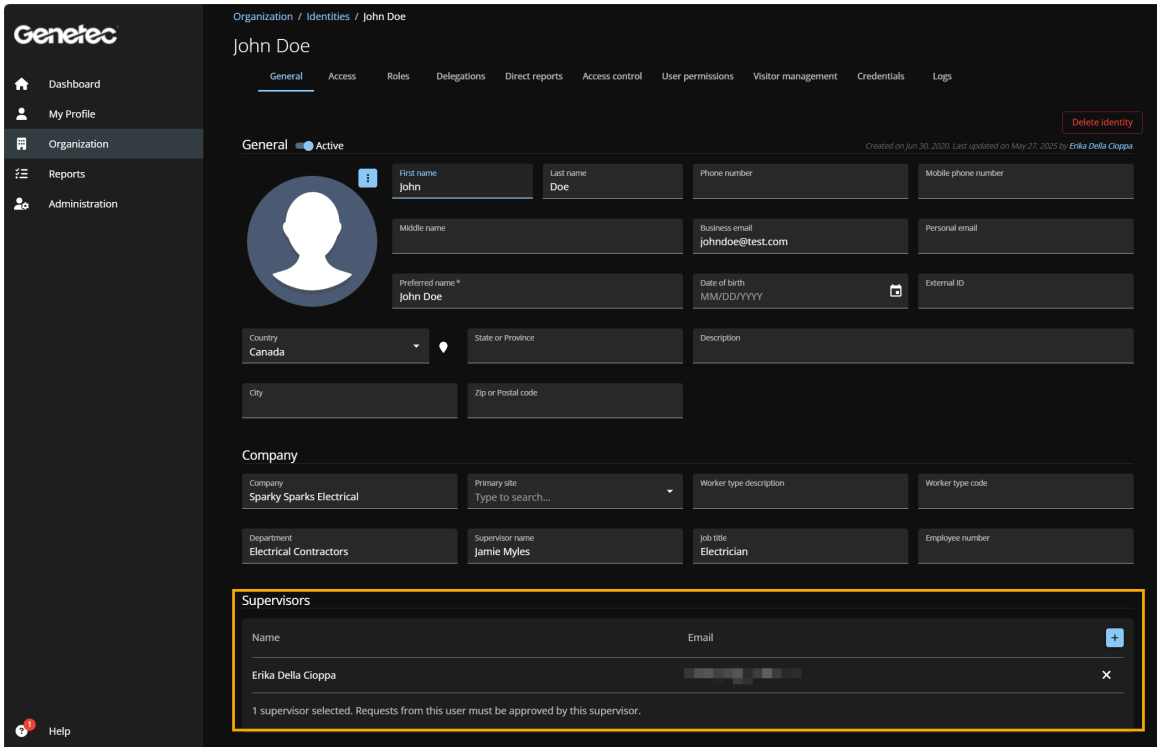
5 Search for or select one or more users from the list that you want to add as supervisors and click **Add** to confirm your selection.

NOTE: Adding multiple supervisors is useful when employees or supervisors work shifts or a rotating days system. In these situations, it's common to have multiple supervisors for different employees on different days.

6 (Optional) Click ✕ to remove any supervisors that are no longer required.

7 Click **Save** to confirm your changes.

The supervisors that you selected have now been added to the supervisors list for this identity.



After you finish

View your direct reports.

Viewing direct reports

As a *Supervisor*, you can check the access control status, general identity information of your direct reports. You can also use the direct report list for security reviews or auditing purposes.

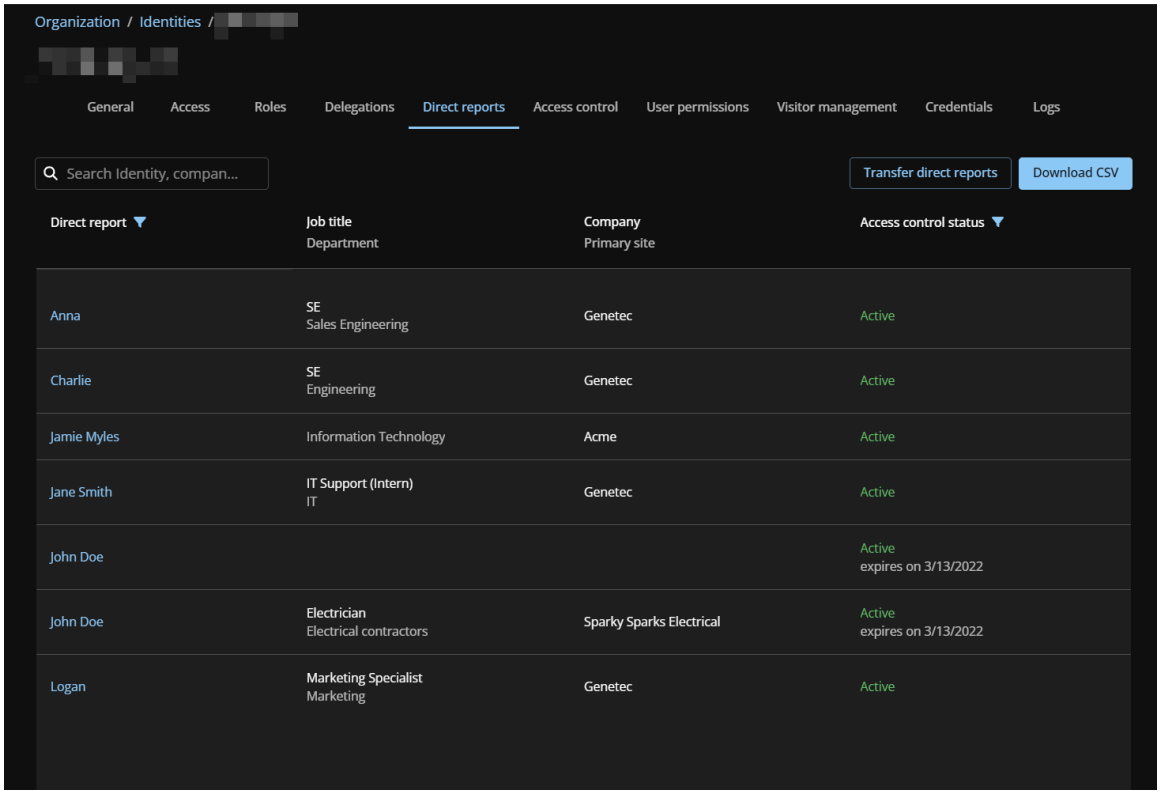
Before you begin

To view *direct reports*, you must be a *Supervisor* or *Account administrator*.

- A *Supervisor* can check general identity information for their direct reports at any point in time, to understand what information Genetec ClearID™ stores about them. They can also see if the information is outdated and request an update.
- An *Account administrator* can check the direct reports of an identity to validate the supervisor link and other information.

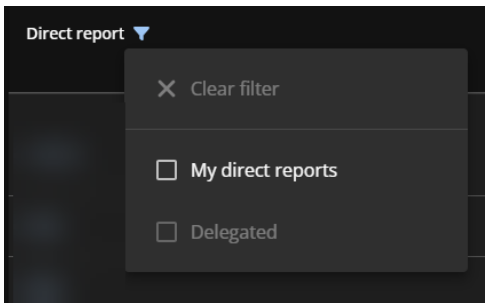
Procedure

1 From the *Home* page, click **My Profile** > **Direct reports**.



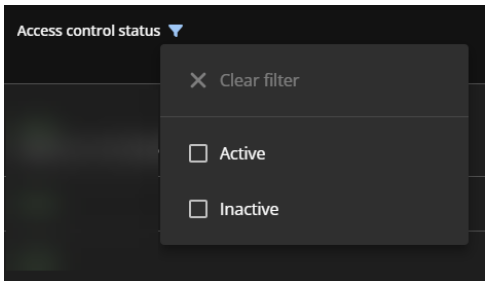
2 Filter the list based on your required criteria:

- **Direct reports:** Click the **Direct report** filter icon ( ) to filter the list. Choose either **My direct reports**, **Delegated**, or both.



- **My direct reports:** Displays employees that are your direct reports.
- **Delegated:** Displays delegated employees (because another user delegated their tasks to you).
  NOTE: Delegated employees are highlighted in the list using a DelegateFromAnotherUser icon
   .
- **Clear filter:** Click **Clear filter** () to remove selected filters.

- **Access control status:** Click the **Access control status** filter icon () to filter the list. Choose either **Active**, **Inactive**, or both.



- **Active:** Displays direct reports with an **Active** access control status.
- **Inactive:** Displays direct reports with an **Inactive** access control status.
- **Clear filter:** Click **Clear filter** () to remove selected filters.

- **Search:** Use the Search bar to search for an identity by first name, last name, or company.

3 Click **Download CSV**, to download a copy of the direct reports list in CSV format. The report can then be used for auditing purposes, to keep a physical copy, to attach to an audit request, to review offline, or to manipulate or consolidate data in a spreadsheet for other audiences.

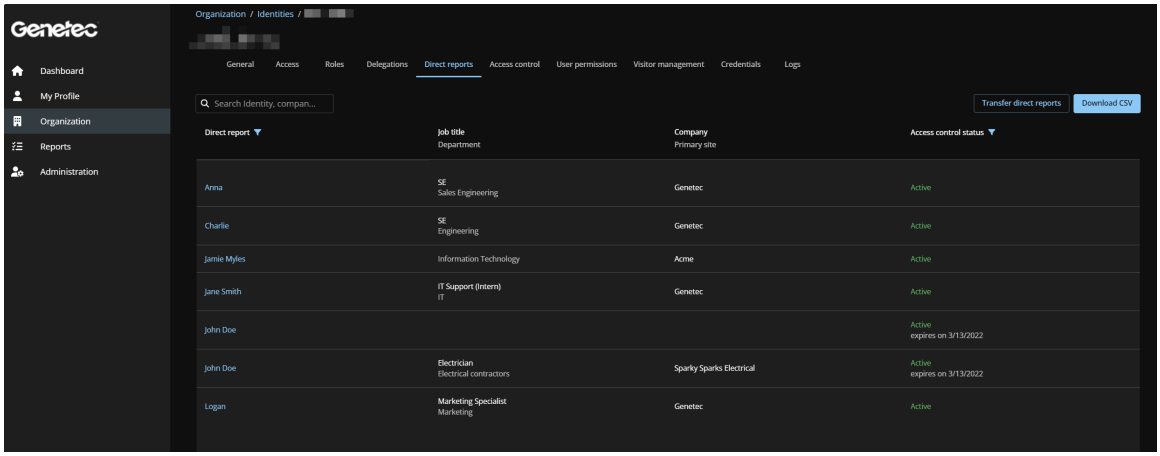
a) Follow your browser prompts to complete downloading the exported file.

The file is exported as a *.CSV* file to the default download location for your browser (*ClearID Direct reports.csv*).

NOTE: The columns and entries in the CSV file can vary depending on the filters you've selected when you download the report.

4 (Optional) Click the name of a direct report in the list to view their identity profile in more detail.
You can also view more details about the identity by browsing the following identity profile pages:

- General
- Access
- Roles
- Delegations
- Access control
- User permissions
- Visitor management
- Credentials
- Logs



After you finish

Manage your direct reports access and roles if required.

Related Topics

Adding supervisors manually on page 158
Creating identities on page 111
About direct reports report on page 176

Managing direct reports

Supervisors can manage their direct reports access. This can include general identity information, area access, modifying or removing roles, task delegation, and access control.

Before you begin

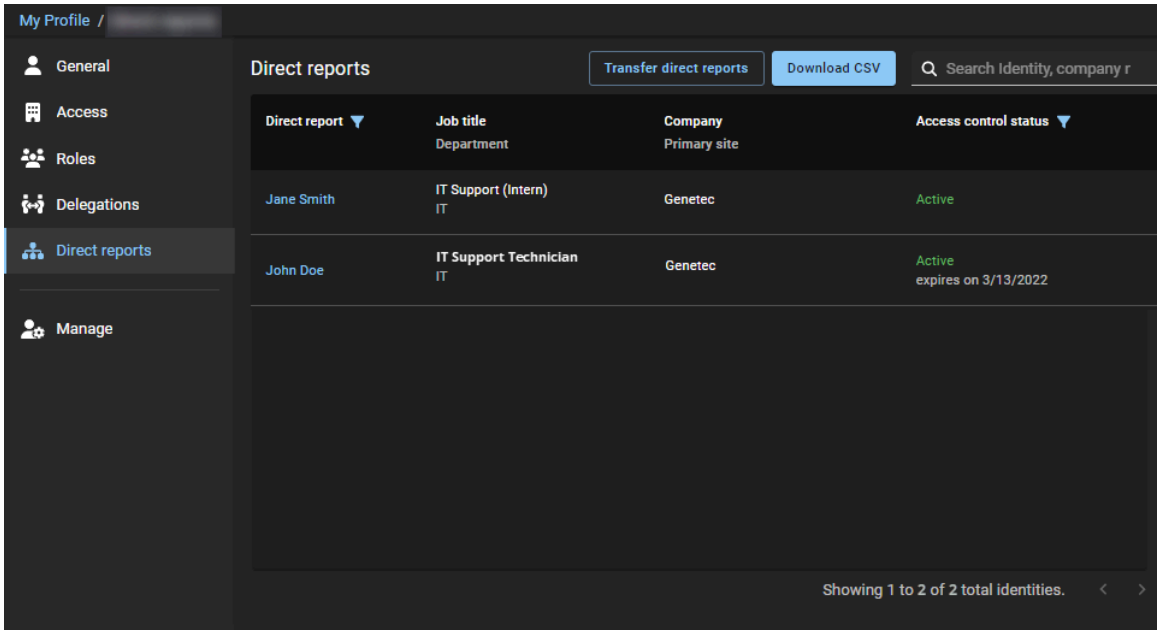
- Adding supervisors manually on page 158.
- (Optional) Add supervisor access to manage direct reports.

What you should know

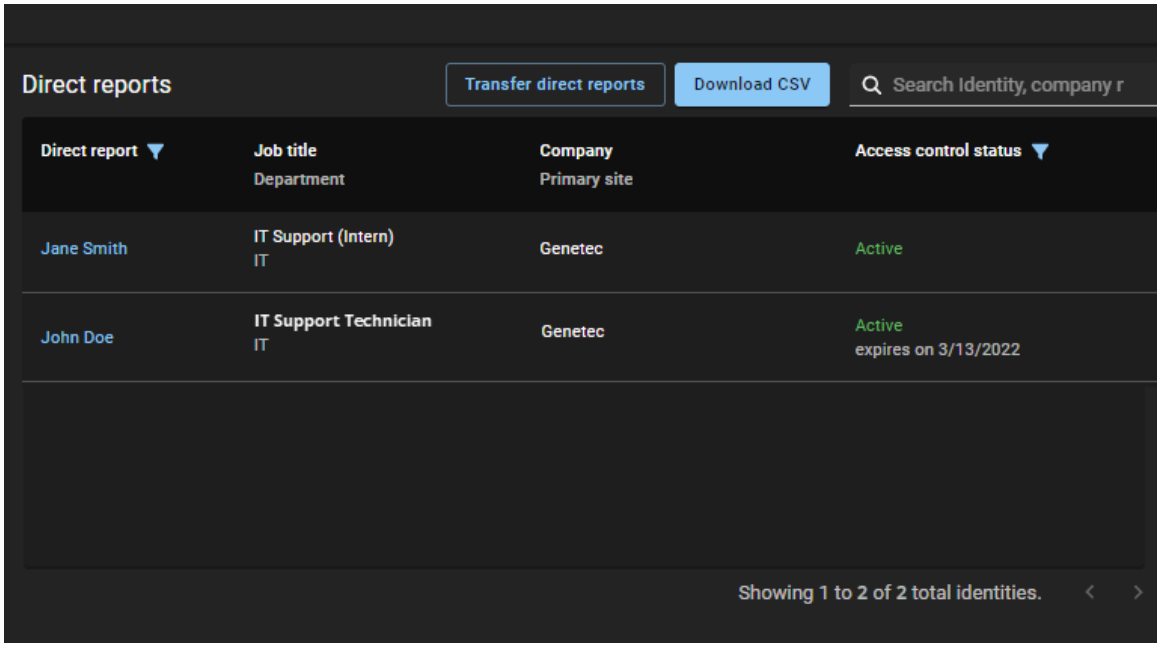
- To manage *direct reports*, you must be a supervisor.
- To modify **General** identity information or **Access control** settings for a direct report, you must be a supervisor with the manage direct reports permission.

Procedure

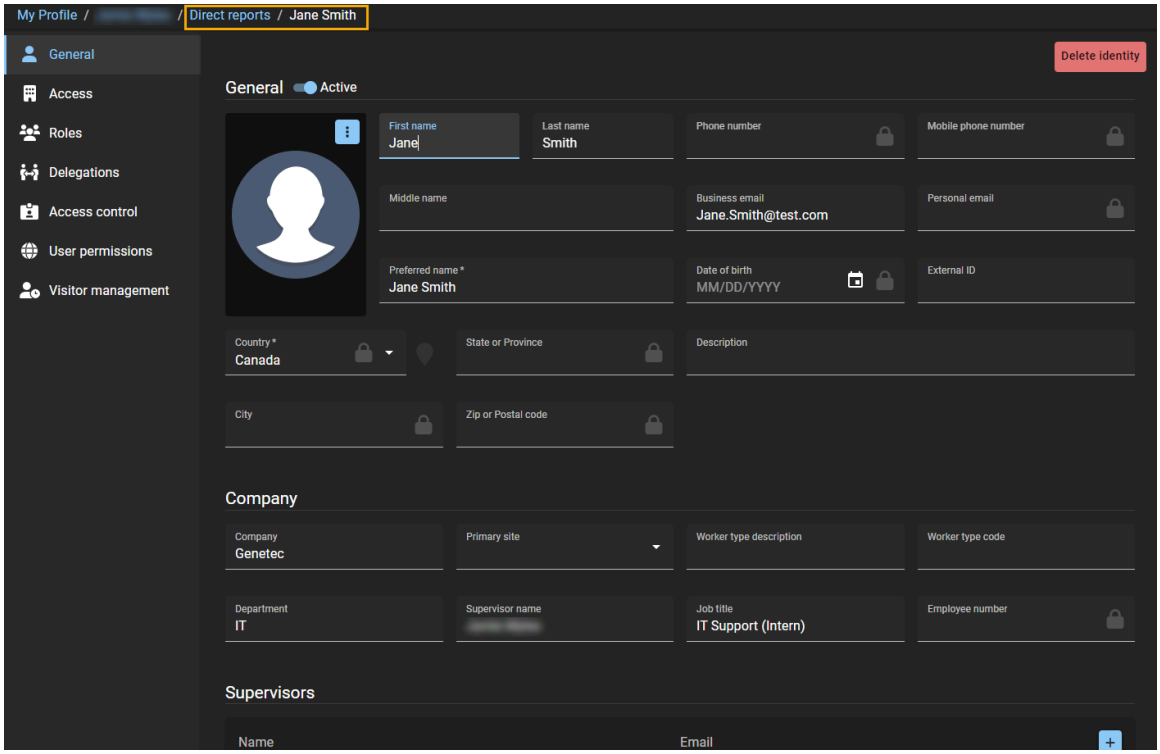
1 From the *Home* page, click **My Profile** > **Direct reports**.



2 In the **Direct reports** list, select the direct report that you want to modify.



TIP: Use the filters described in Viewing direct reports on page 160 to search for and select the direct report you require.

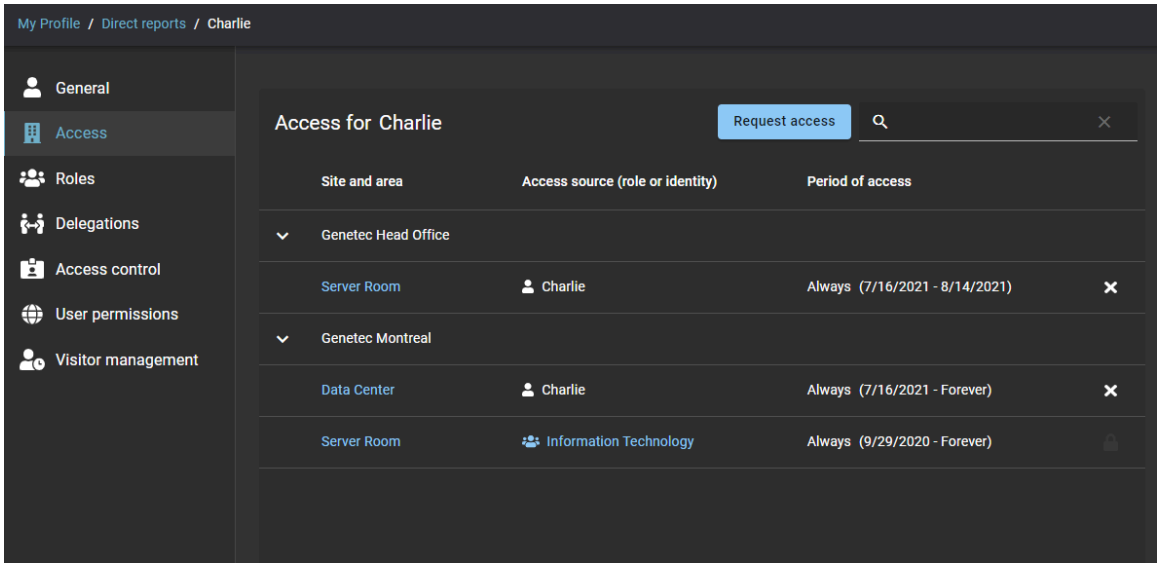


IMPORTANT: General identity information attributes are typically synchronized from an external data source to populate the general identity information. If you make updates to identities that are synchronized with an external data source, your changes can be overwritten by the synchronization.

- A supervisor with default permissions cannot modify any of the **General** identity information for their direct reports.

- A supervisor with manage direct reports permission can modify the **General** identity information if required. This enhanced permission is typically used to manage contractors or temporary workers who are not synchronized from an external data source.

3 Click the **Access** page to request or modify area access for your direct report.

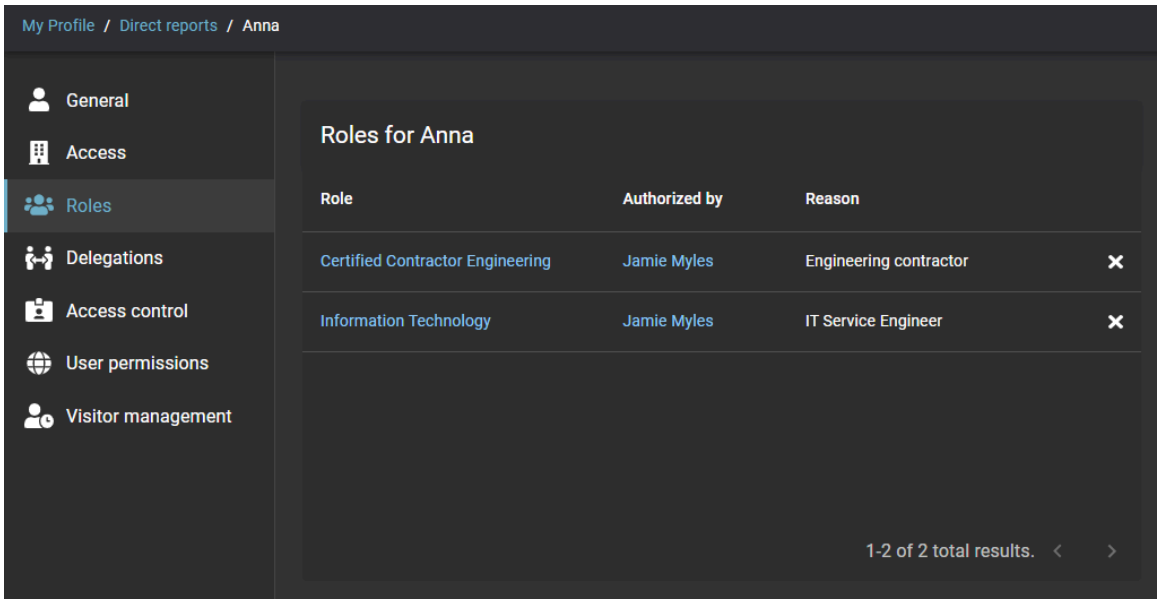


a) Click **Request access** to request access to one or more areas.

b) Click ✕ to remove any area access that is no longer required and click **Revoke** to confirm the removal.

NOTE: You can only remove area access that was manually added. Area access that was added using a provisioning policy is identified using the locked (🔒) icon and cannot be modified.

4 Click the **Roles** page to modify or delete role access for your direct report.

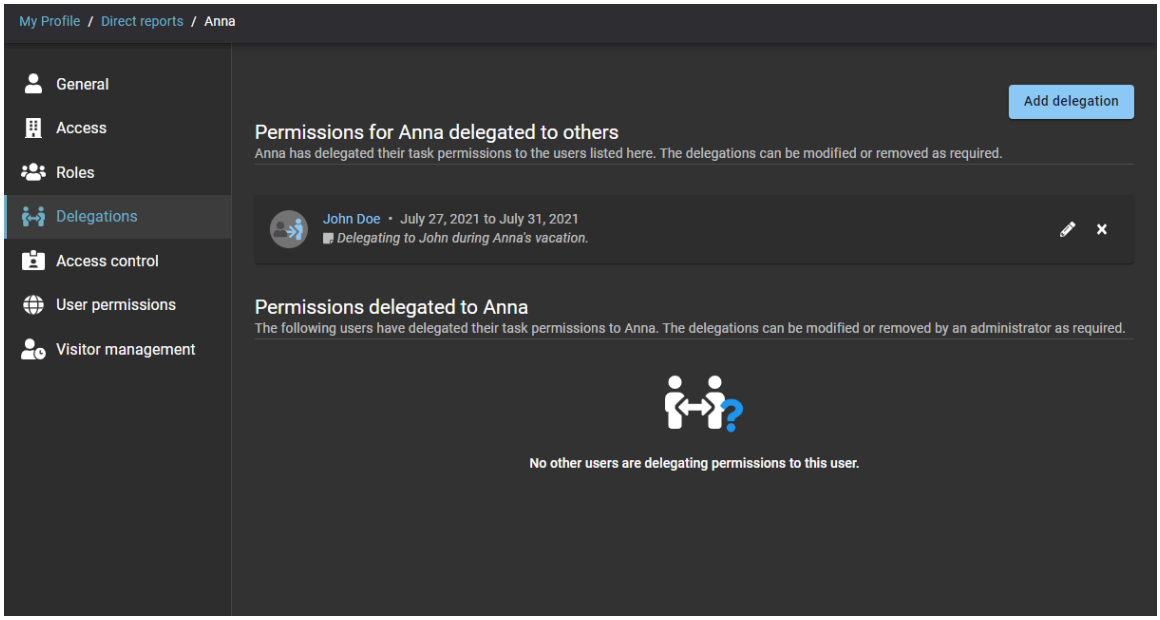


a) Click a role hyperlink to view the role details.

b) Click ✕ next to a role to remove the role access that is no longer required and click **Remove** again to confirm.

NOTE: You can only remove roles that were manually added. Roles that were added using a provisioning policy are identified using the locked (🔒) icon and cannot be modified.

5 Click the **Delegations** page to view or modify delegations for your direct report.

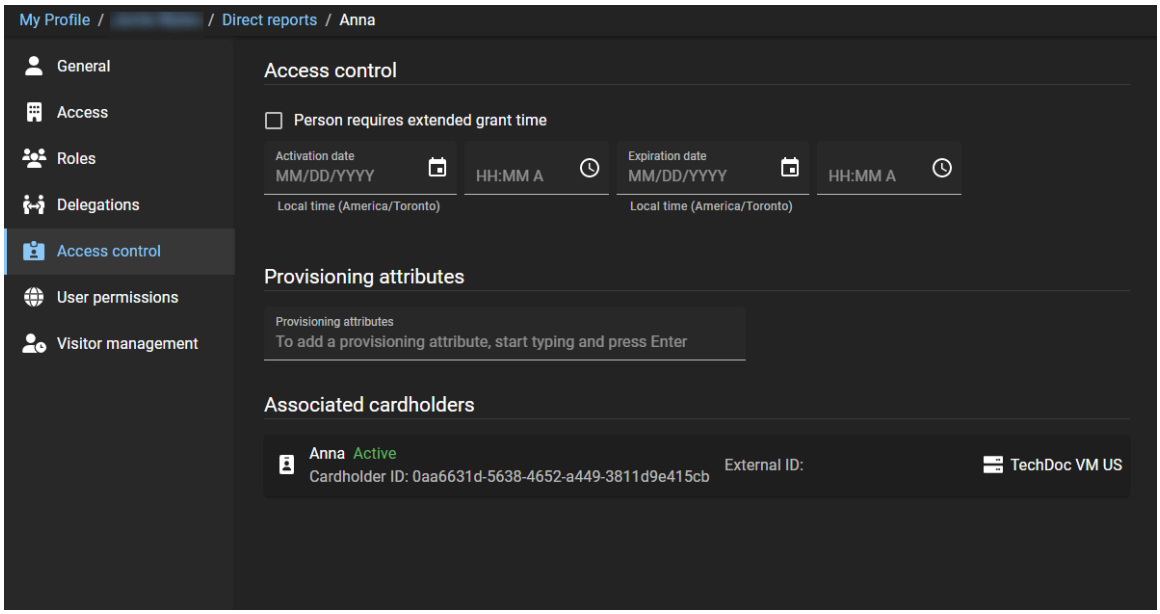


a) Click **Add delegation** to delegate tasks to another user.

b) Click next to a delegation to modify the settings.

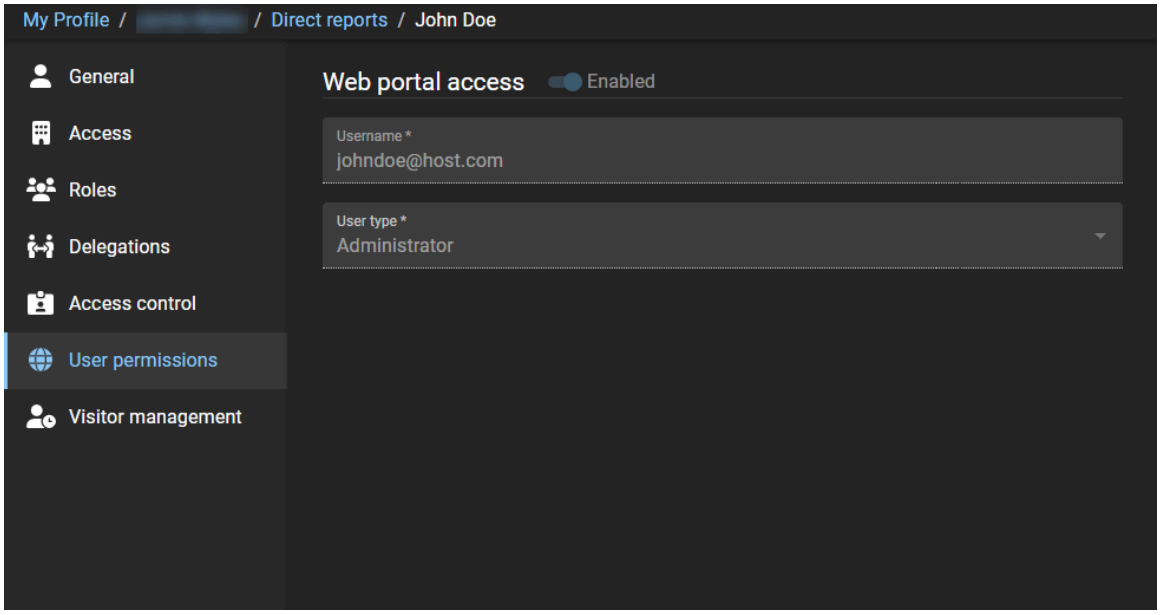
c) Click next to a delegation to remove a delegation that is no longer required.

6 Click the **Access control** page to view the access control settings for your direct report.

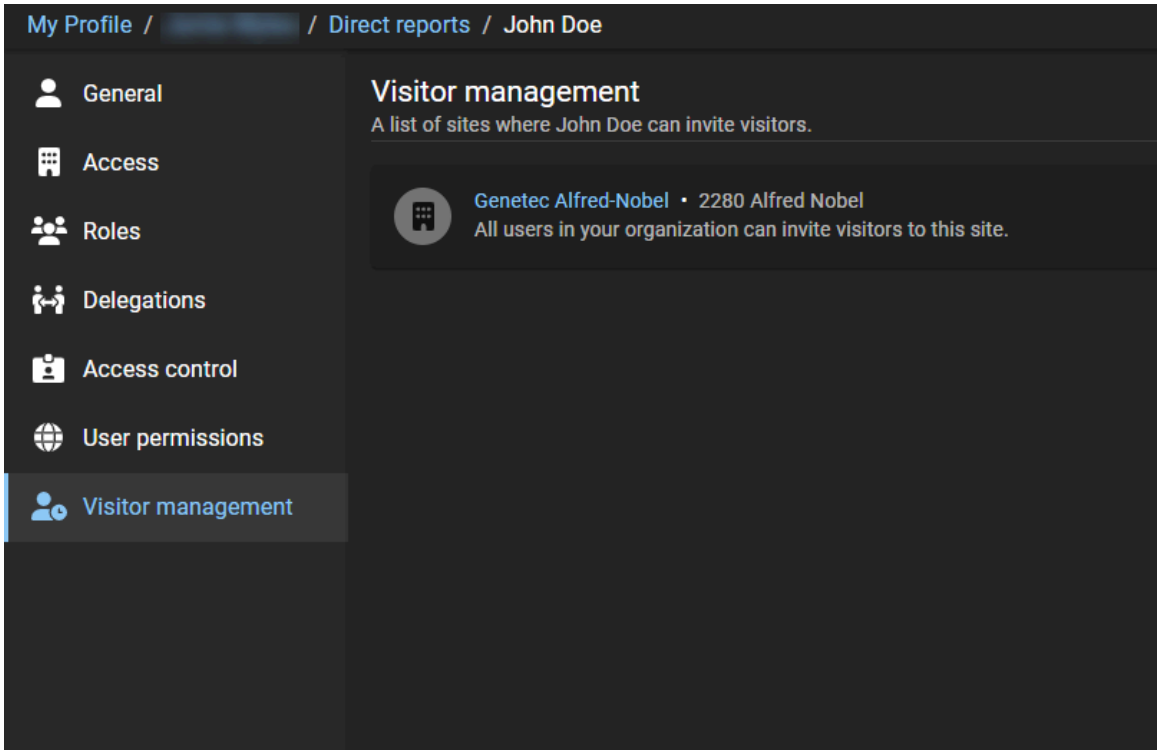


a) (Optional) A supervisor with manage direct reports permission can modify the **Access control** settings if required.

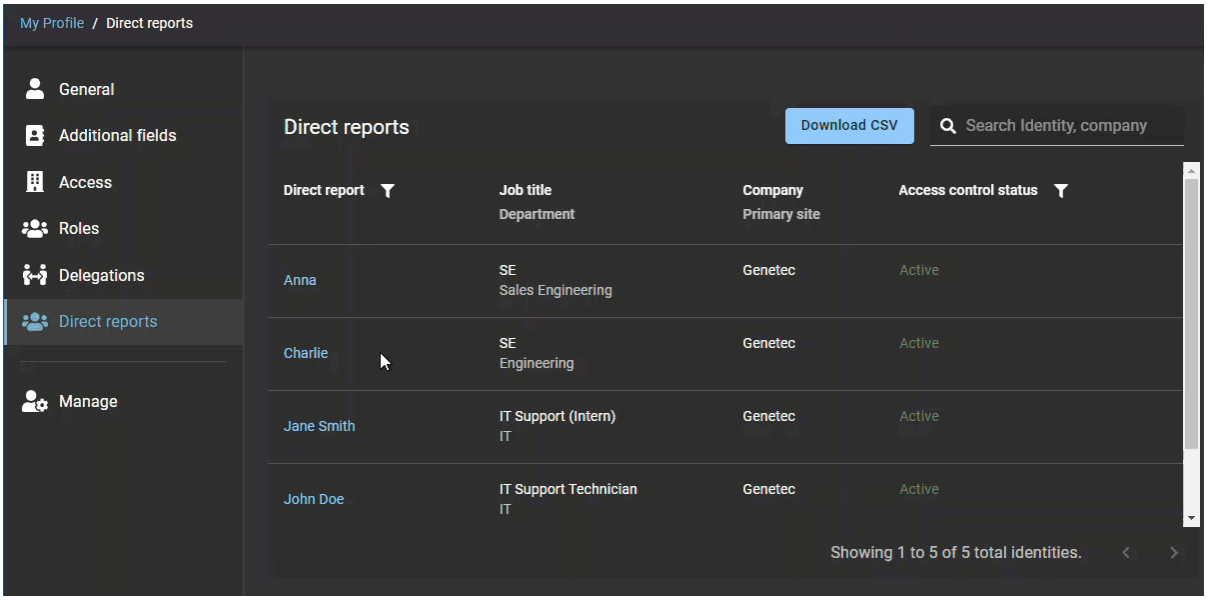
7 Click the **User permissions** page to view the web portal permissions for your direct report.



8 Click the **Visitor management** page to view the visitor management settings for your direct report.



Example



Related Topics

Granting additional permissions for supervisors on page 118

Transferring direct reports

From time to time a supervisor, account administrator, or an identity might need to transfer direct reports. For example, transferring direct reports to a new hire or for a change in supervisor.

Before you begin

You must have a supervisor or an identity with direct reports ready to transfer.

What you should know

To transfer *direct reports*, you must be a supervisor or an identity with elevated write permissions for identities, or an account administrator.

- You can transfer direct reports to another identity (regardless of their permissions).
- You can add a maximum of 20 supervisors when transferring direct reports.

IMPORTANT: This function is intended for identities that are locally managed in Genetec ClearID™. If identities are managed using an external data source, the transfer of direct reports will be overwritten.

Procedure

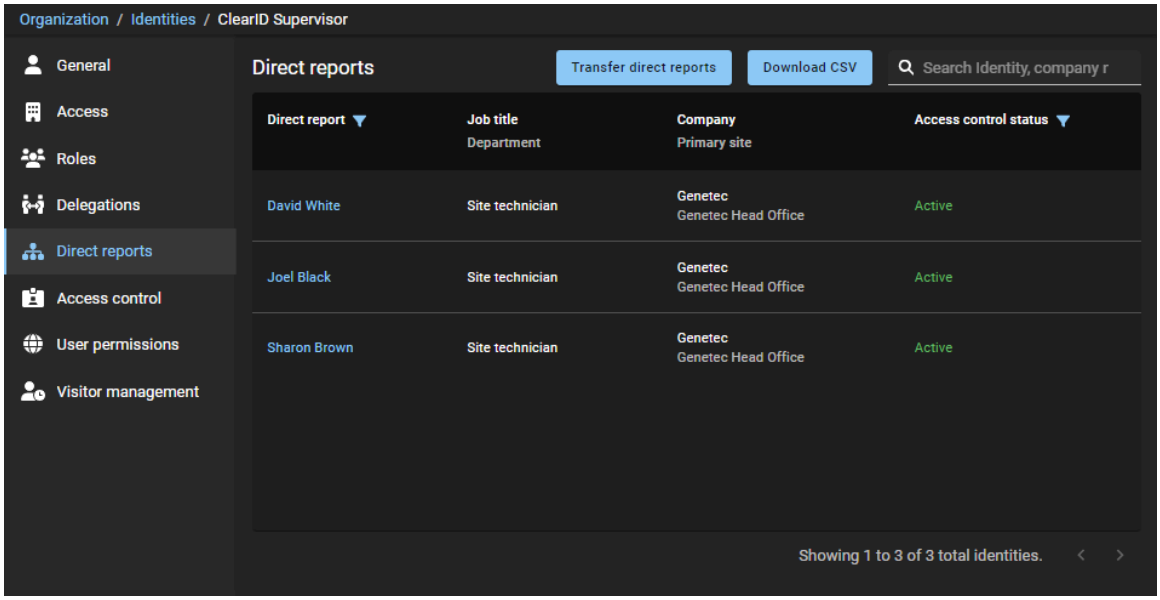
To transfer direct reports (Performed by an account administrator or an identity):

1 From the *Home* page, click **Organization** > **Identities**.

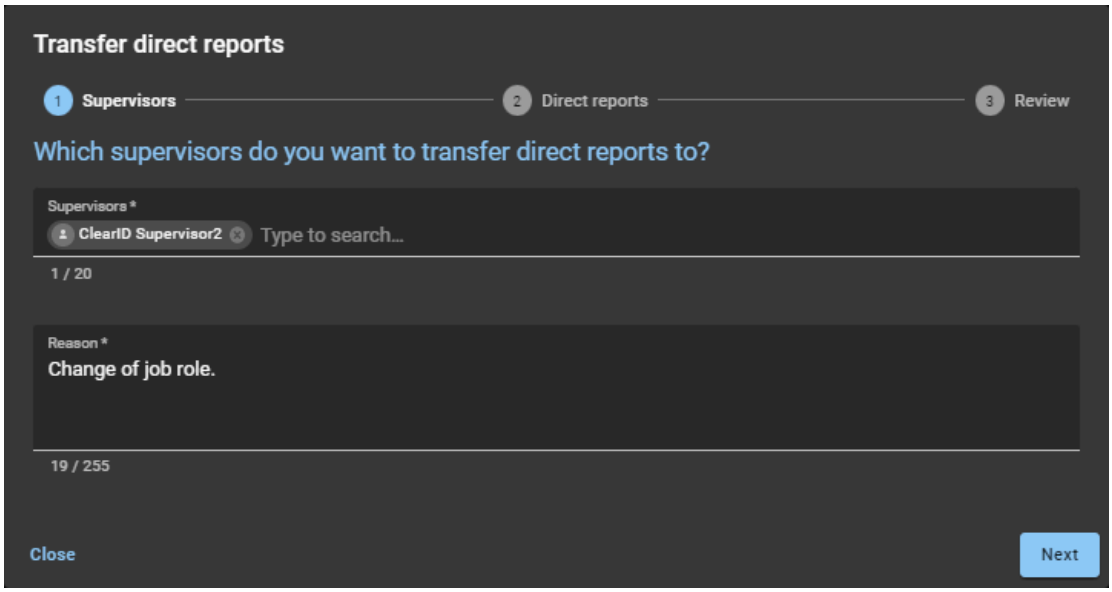
2 Select the identity whose direct reports you want to transfer.

3 Click **Direct reports**.

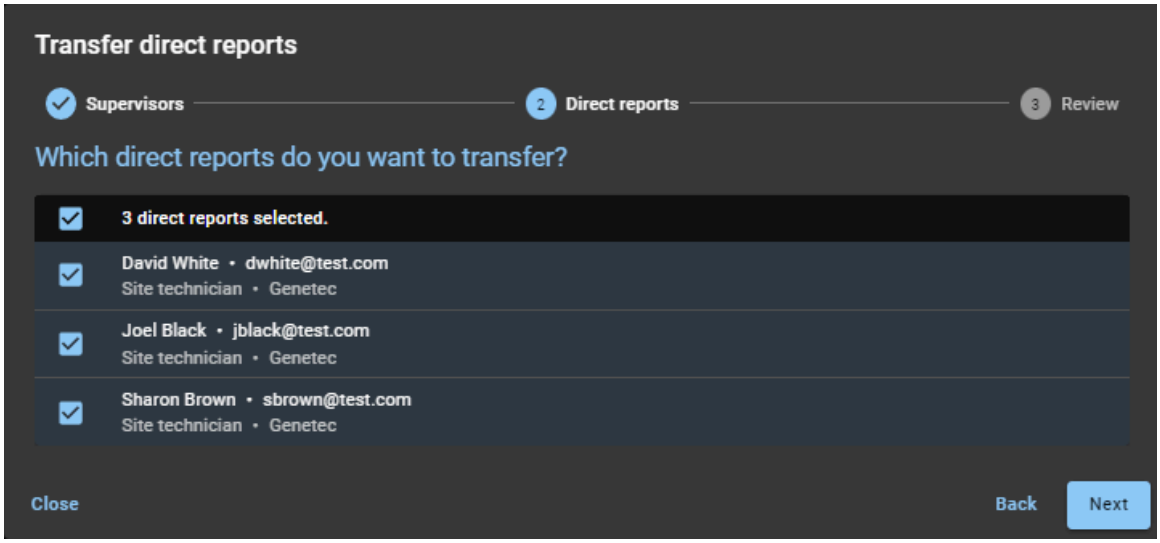
4 Click **Transfer direct reports**.



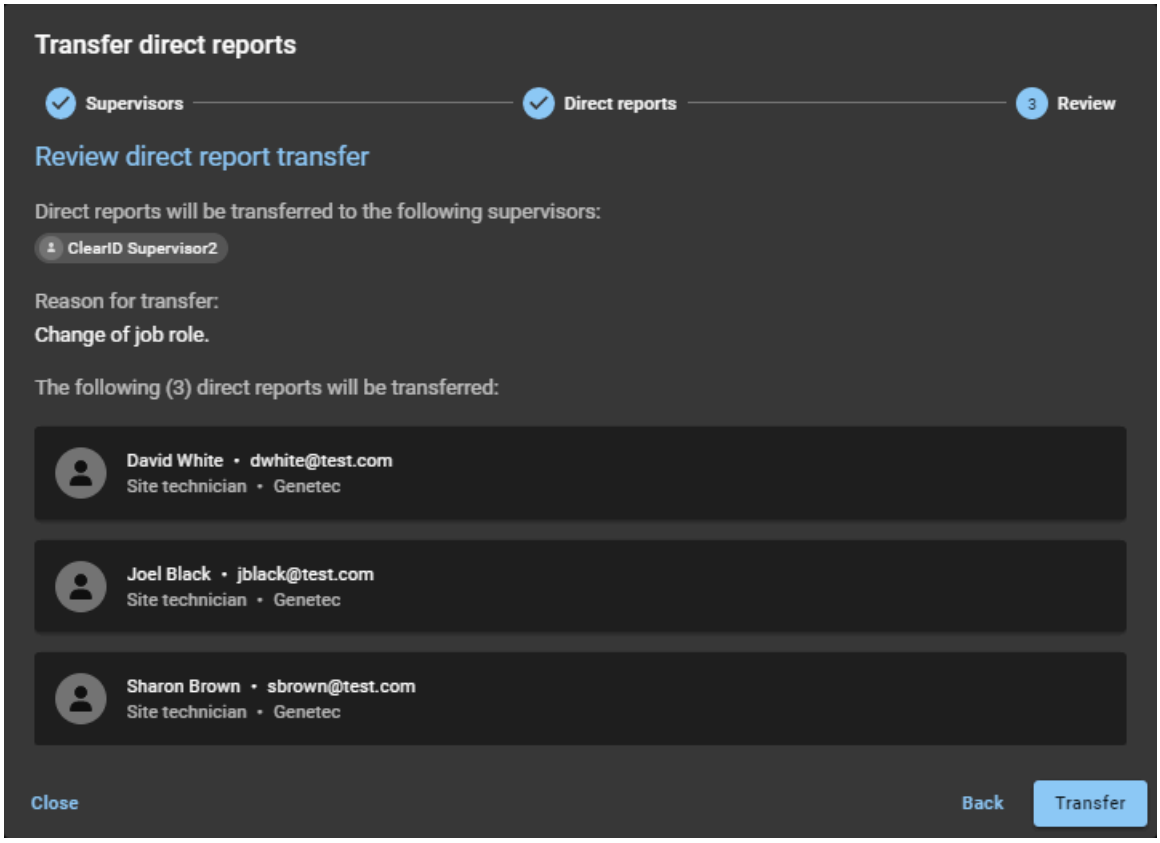
5 In the *Supervisors* section of the *Transfer direct reports* dialog, complete the fields.
   a) Search for and select one or more supervisors.
   b) Enter a reason for transferring the direct reports and click **Next**.



6 In the *Direct reports* section, select the direct reports you want to transfer and click **Next**.

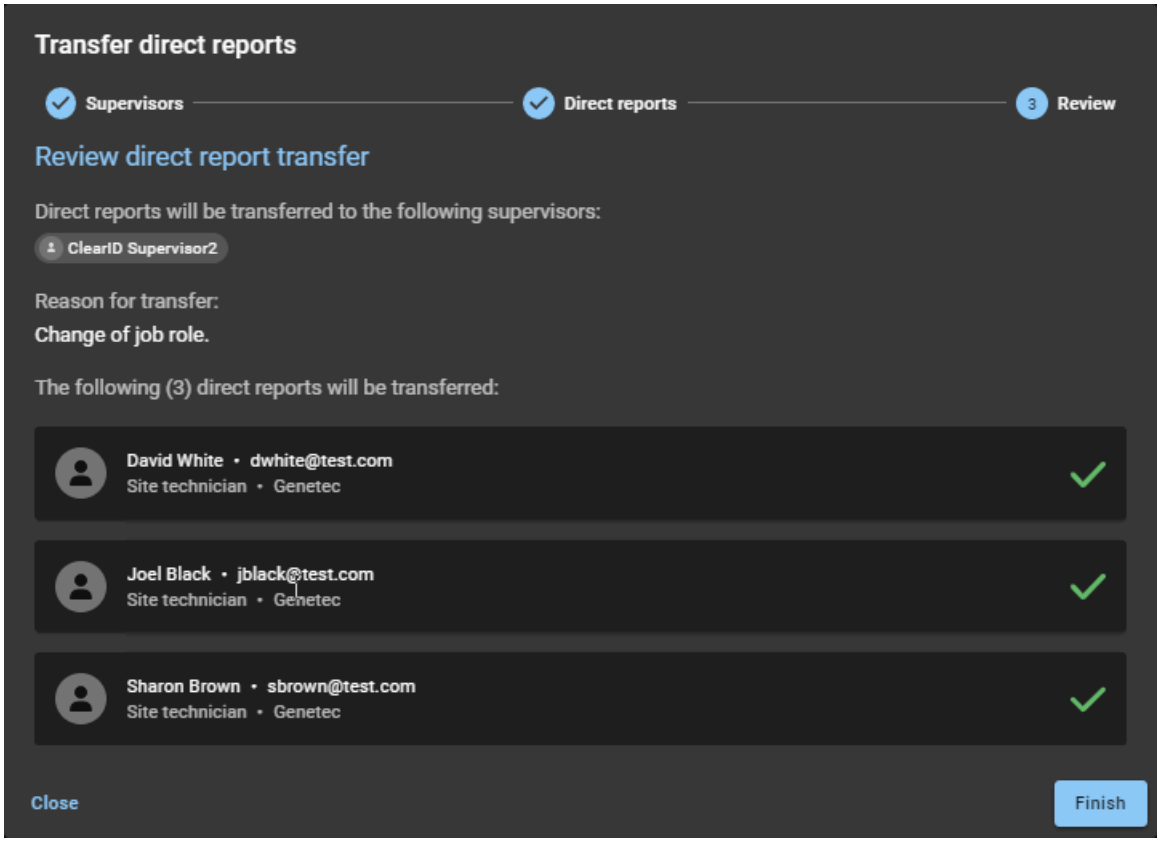


7 In the **Review** section, verify the details of the direct reports that you want to transfer.



a) (Optional) If you need to make some additions or changes, click **Back** to return to previous steps.
b) If no further changes are required, click **Transfer** to initiate the transfer.

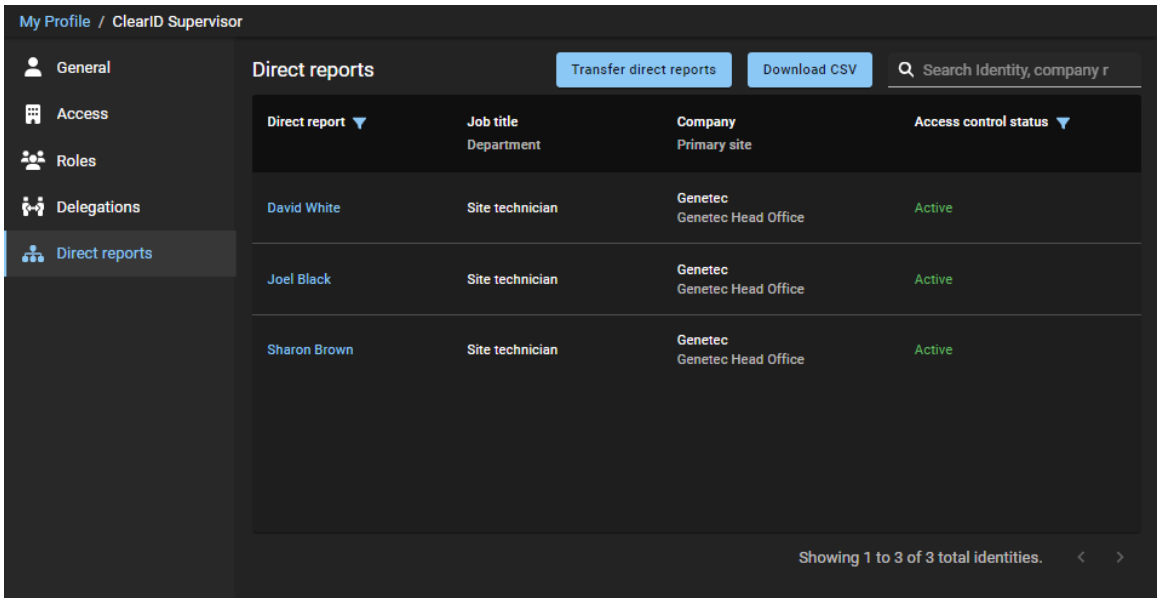
8 Click **Finish** to complete the transfer request.



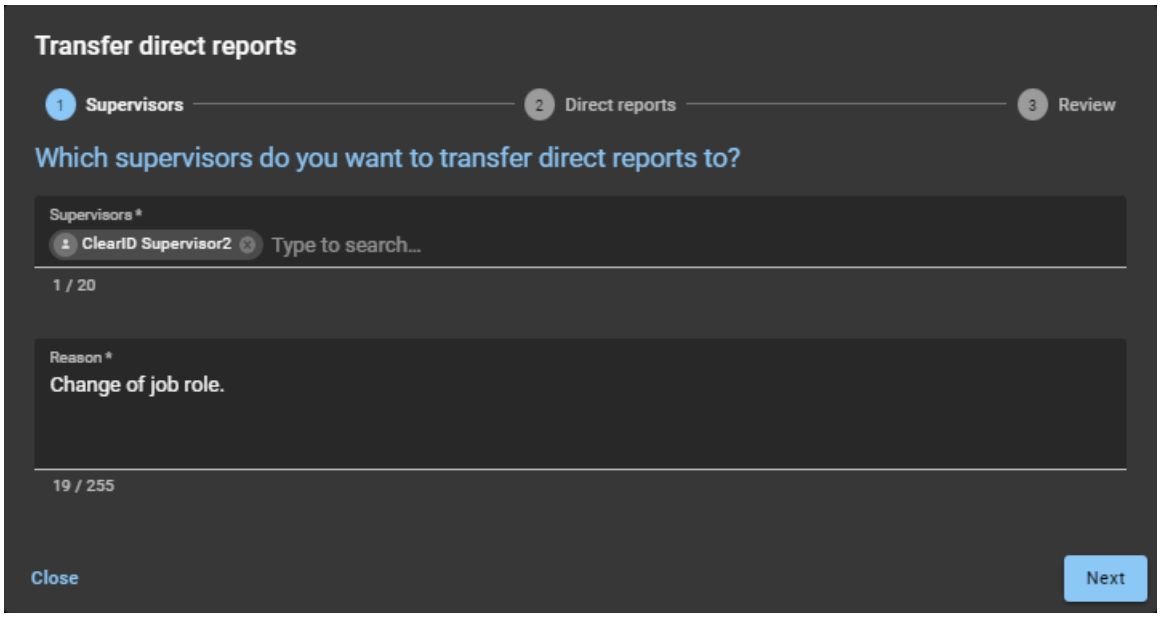
To transfer direct reports (Performed by a supervisor):

1 From the *Home* page, click **My Profile** > **Direct reports**.

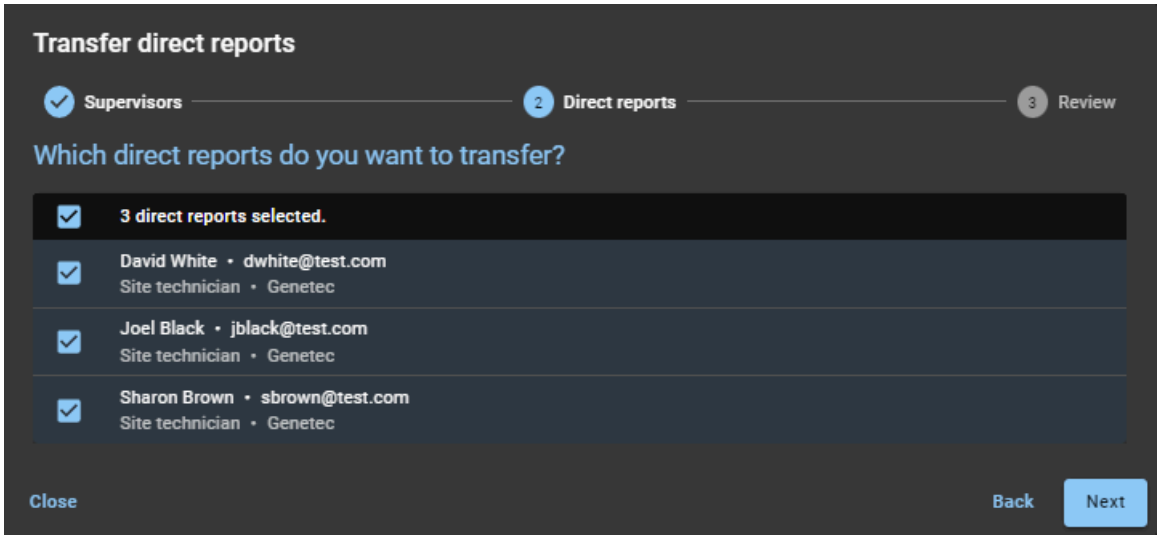
2 Click **Transfer direct reports**.



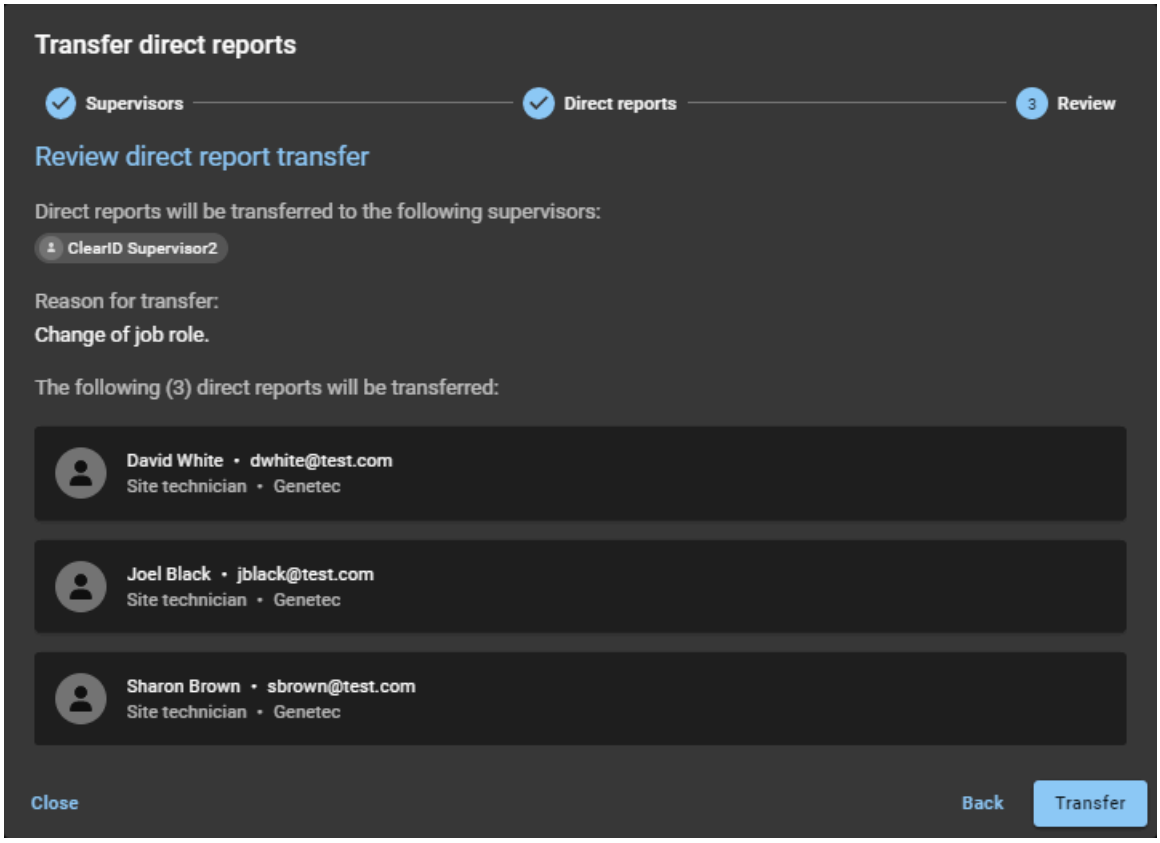
3 In the *Supervisors* section of the *Transfer direct reports* dialog, complete the fields.
   a) Search for and select one or more supervisors.
   b) Enter a reason for transferring the direct reports and click **Next**.



4 In the *Direct reports* section, select the direct reports you want to transfer and click **Next**.

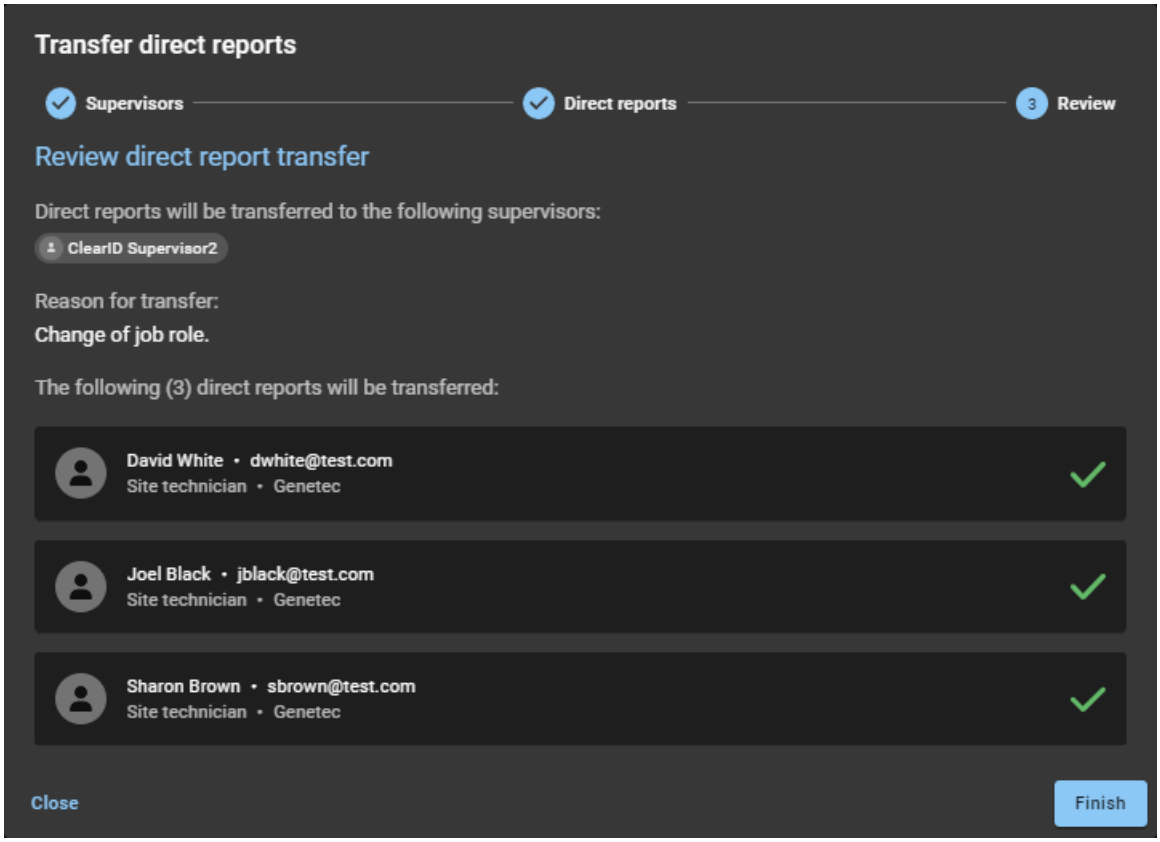


5 In the **Review** section, verify the details of the direct reports that you want to transfer.



a) (Optional) If you need to make some additions or changes, click **Back** to return to previous steps.
b) If no further changes are required, click **Transfer** to initiate the transfer.

6 Click **Finish** to complete the transfer request.



Example

After you finish

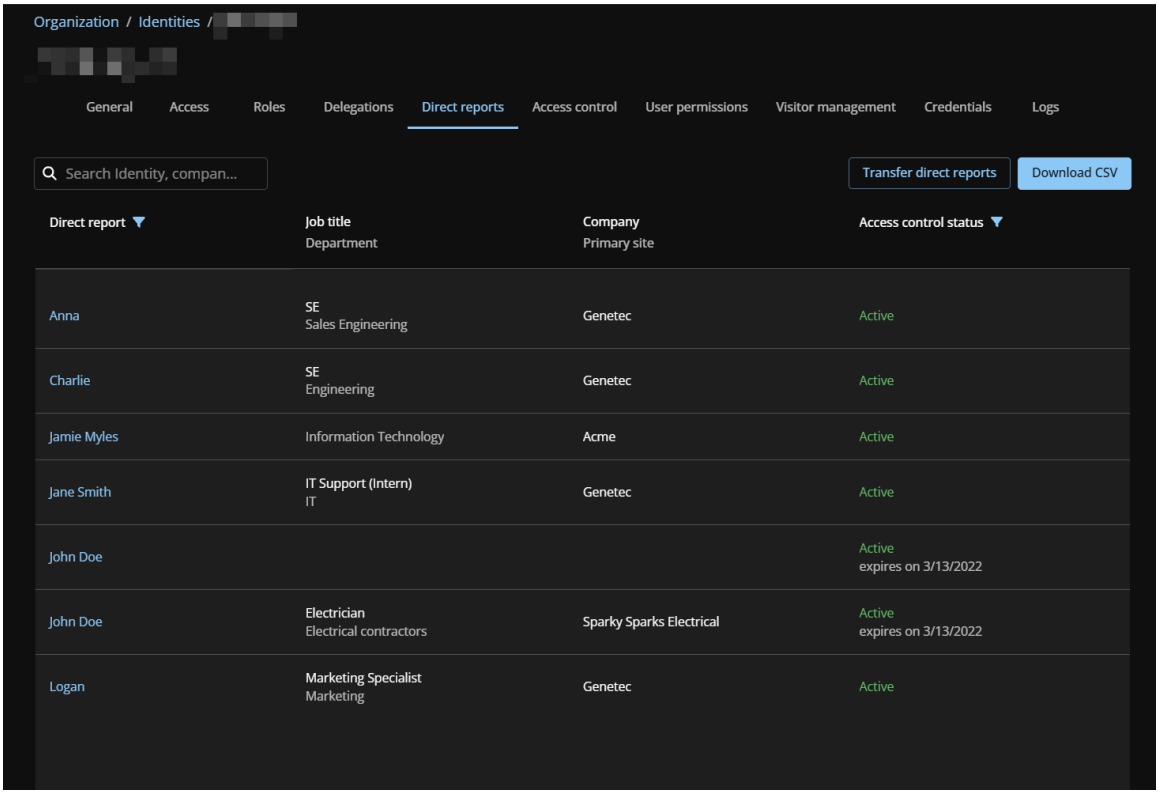
View the new supervisors identity to check that the direct reports were transferred successfully.

Related Topics

Granting additional permissions for identities and roles on page 115
Granting additional permissions for supervisors on page 118

About direct reports report

In Genetec ClearID™, a direct reports report is a list of identities of employees that report to a supervisor. The report includes information about direct reports, delegated direct reports, job titles, companies, and access control status.



The direct reports report is used by supervisors to view their direct reports to check their access control status and general identity information. The report can also be used to provide direct reports information to auditors.

Filters can be used to help refine the search results by direct reports (or delegated direct reports) and access control status (active or inactive).

Figure 1: Direct reports report

Related Topics

Viewing direct reports on page 160

Resetting user passwords

If you're unable to authenticate while signing in to an account managed by Genetec ClearID™, you can reset your password.

What you should know

Password reset is only available for users with accounts managed by ClearID. Use industry best practices for creating strong passwords.

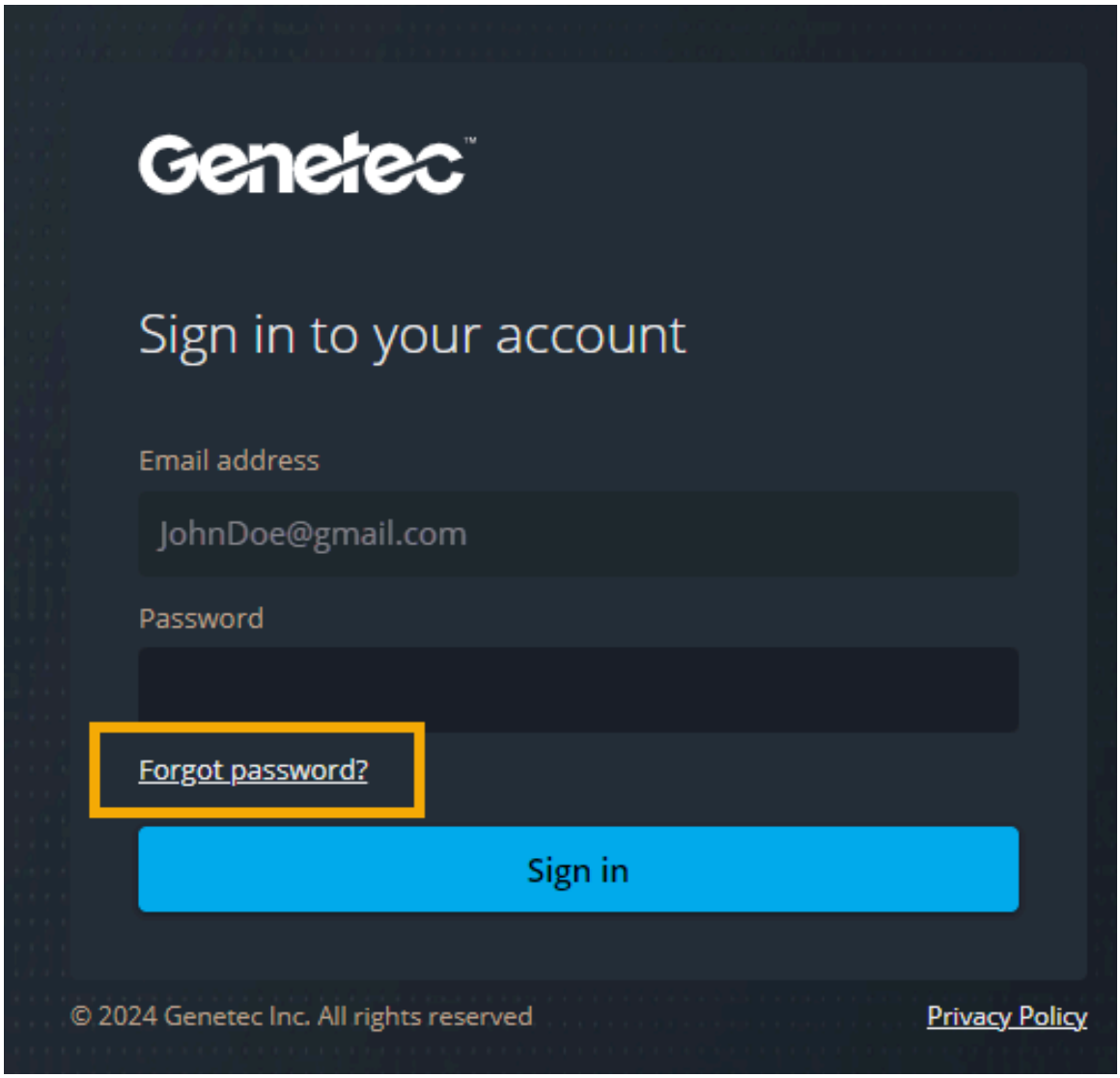
NOTE: This procedure isn't applicable to corporate single sign-on.

Procedure

1 In a web browser, do one of the following:

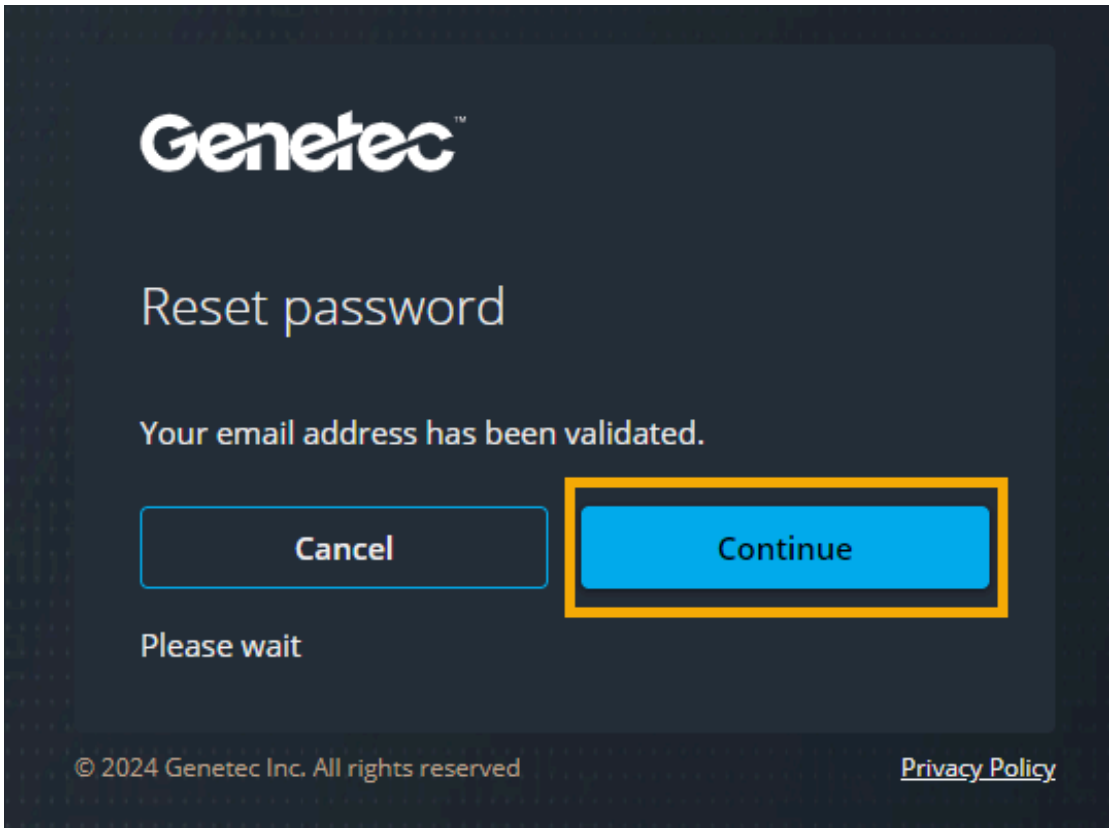
- If you have a production account, got to https://portal.clearid.io.
- If you have a demo or test account, go to Go to https://demo.clearid.io.

2 Enter your email address and click **Sign in**.
You're redirected to the new Genetec™ sign in page.



3 Click **Forgot password?**.
You're redirected to the *Reset password* page.

4 On the *Reset password* page, click **Send code** to receive an email with a verification code.
   a) Enter the verification code in the **Verification code** field on the *Reset password* page.
   b) Click **Verify code**.
   c) After your email is validated, click **Continue**.



5 Enter and confirm your new password, then click **Continue**.

You can now access ClearID using the password you created.

About email notifications

Genetec ClearID™ sends email notifications to inform users about specific system events related to access, identities, roles, and visits.

Email notifications are sent from *noreply@clearid.io*. If you don't receive email notifications in either your Inbox or Spam (Junk) folders, contact your *account administrator*.

To opt out of or resubscribe to email notifications, see Configuring your email notification preferences on page 184

The following events can trigger email notifications:

Trigger event for notification	Possible notification recipients
Activity Summary	
Weekly activity summary **NOTE:** • The weekly activity summary summarizes all pending tasks or requests related to visit events, identity requests, or area access requests that require approval. You don't receive these notifications if you have no tasks or requests. • Weekly activity summary emails are sent every Monday at 9:00 am based on the identity's primary site. If no primary site is set, the email is sent at 9:00 am GMT.	• Requesters • *Visit approvers* • *Supervisors* • *Identity approvers* • *Area owners* • *Area managers* • *Role managers*
Access for an identity	
Account is created for an identity **IMPORTANT:** If a corporate log on (single sign-on using Microsoft Office 365 or similar) is used, the account is automatically activated and no activation email is received.	• Identity • *Account administrators*
Area access request for an identity is submitted	• Identity requester
Area access request for an identity is canceled	• Identity requester • *Area managers* • *Area owners*
Area access request for an identity requires approval or denial **TIP:** • No email is sent if the request is auto-approved. • The email recipient depends on the system's workflow settings.	• *Supervisors* • *Area managers*
Area access request for an identity is approved or denied	• Identity • *Area owners*

Trigger event for notification	Possible notification recipients
NOTE: If the person who submits an access request and the identity the access request is for are different, both receive the email.	
Area access for an identity is granted	• Identity • *Identity supervisors*
Area access for an identity is revoked (or expired) **NOTE:** Access expired emails are sent at midnight based on the time zone specified for the site.	• Identity • *Identity supervisors*
Access for a role	
Access request submitted for a role **NOTE:** Both *role owners* and *role managers* can request access for roles. The user who made the request receives the email.	• *Role managers* • *Role owners*
Area access request for a role requires approval or denial	• *Supervisors* • *Area managers*
Area access request for a role is approved or denied **NOTE:** *Supervisors* or *area managers* must approve or deny the request.	Approved: • *Area managers* Denied: • All *Role managers*
Area access granted for role **NOTE:** *Area managers* can approve area access requests for roles, or the requests can be auto-approved. A role can also be manually granted access to an area.	• All *Role managers*
Area access revoked for a role	• All *Role managers*
Identity added to role membership	• Identity
Identity removed from role membership	• Identity
Identity requests	
Identity requested **NOTE:** If one of the requested identities is canceled, all configured approvers are added to the **Cc** list of the identity request approval and completion email. The subject of the email is: "Identity request for *identity* has been updated".	• Requester • *Supervisors* (if configured in the identity template) • *Identity approvers* (if configured in the identity template)
Visit events	

Trigger event for notification	Possible notification recipients
Visit created	• Requester • Hosts
Visit requires approval or denial **NOTE:** No email is sent if the request is auto-approved.	• *Supervisors*
Visit approved or denied	• Requester • Hosts
Visitor confirmation	• Visitor
Visit request requires approval or denial **NOTE:** No email is sent if the visit is auto-approved.	• *Area managers* (depending on workflow) • *Visit approvers* (depending on workflow)
Visitor checked-in	• Hosts
Visitor watchlist alert (notify or block)	• *Watchlist managers*
Access reviews	
Access review pending	• *Area managers* • *Role managers*

Related Topics

Configuring your email notification preferences on page 184
Configuring email notification preferences (administrator) on page 183

Customizing the email banner for sites

You can customize the email banner image that is used for access requests and visitor requests email notifications sent for the site.

Before you begin

Configuring the Self-Service Kiosk iPad on page 564

TIP: Ensure that your email banner image meets the requirements described in the tooltip on the **Images** page of the Genetec ClearID™ web portal.

What you should know

Only a site owner or account administrator can customize email banners.

- Customized email banner changes are synchronized with your site every 60 seconds.

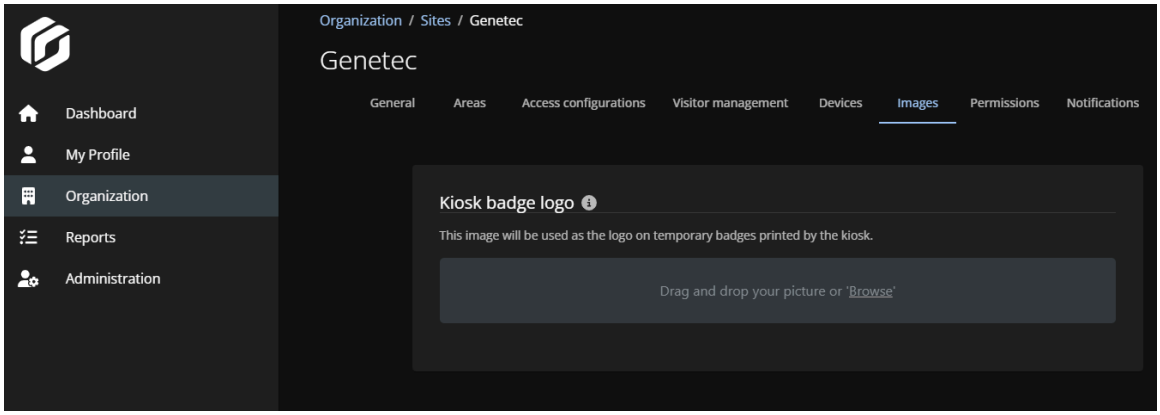
BEST PRACTICE: For optimum results, use transparent *.PNG* images when customizing your email banner.

Procedure

1 In the ClearID web portal, click **Organization** > **Sites**.

2 Search for and select a site.

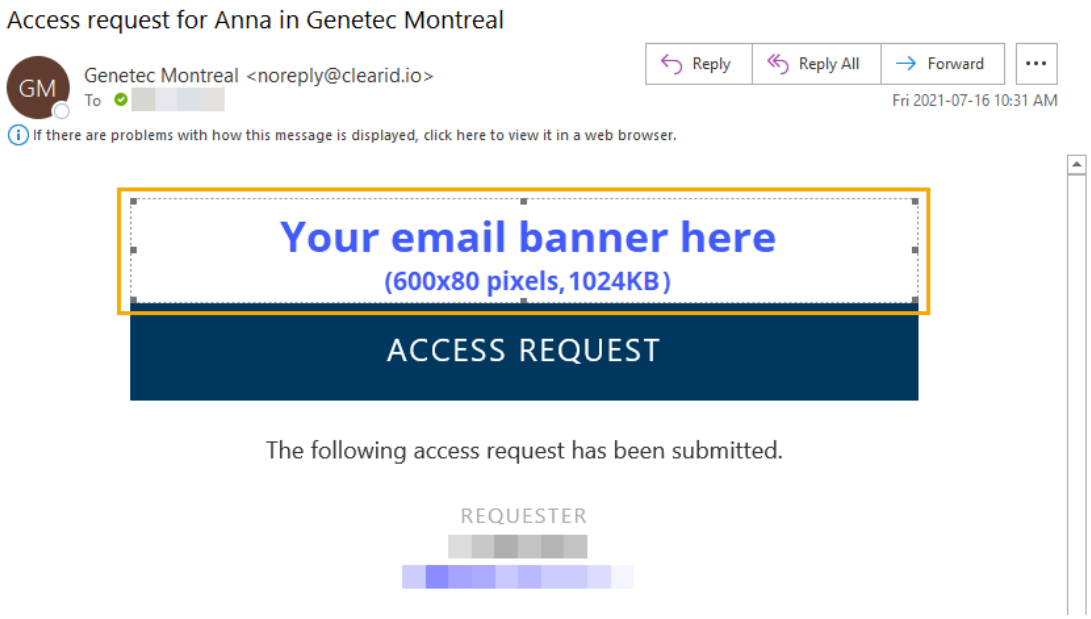
3 Click **Images**.



a) In the *Email banner* section, drag and drop your picture or browse to select the **Email banner** image.

b) Click **Save**.

The following example shows an email banner with a custom image.



Configuring email notification preferences (administrator)

Genetec ClearID™ portal users receive email notifications for visit requests, access requests, activity summaries, and more. *Account administrators* can decide which notifications users receive by default and whether users can opt out of email notifications.

What you should know

Only *Account administrators* can configure which email notifications are sent out and which stakeholders receive them, where applicable.

Procedure

1 In the ClearID portal, click **Administration** > **Notifications**.

2 In the *Emails and recipients* section, configure your preferences as needed:

- **Enabled:** Turn on the **Enabled** option to send an email notification to users by default.
- **Can opt out:** Turn on the **Can opt out** option to allow users to opt out of a notification in their personal email notification preferences.

NOTE: You can only allow users to opt out of a notification type if the **Enabled** option for that notification is turned on.

3 Where applicable, choose which stakeholders receive the notification email.

4 Click **Save**.

Related Topics

About email notifications on page 180

Configuring your email notification preferences

You receive email notifications for visit requests, access requests, various activity summaries, and more from Genetec ClearID™. You can decide which notifications you want to receive and configure your notification preferences accordingly.

What you should know

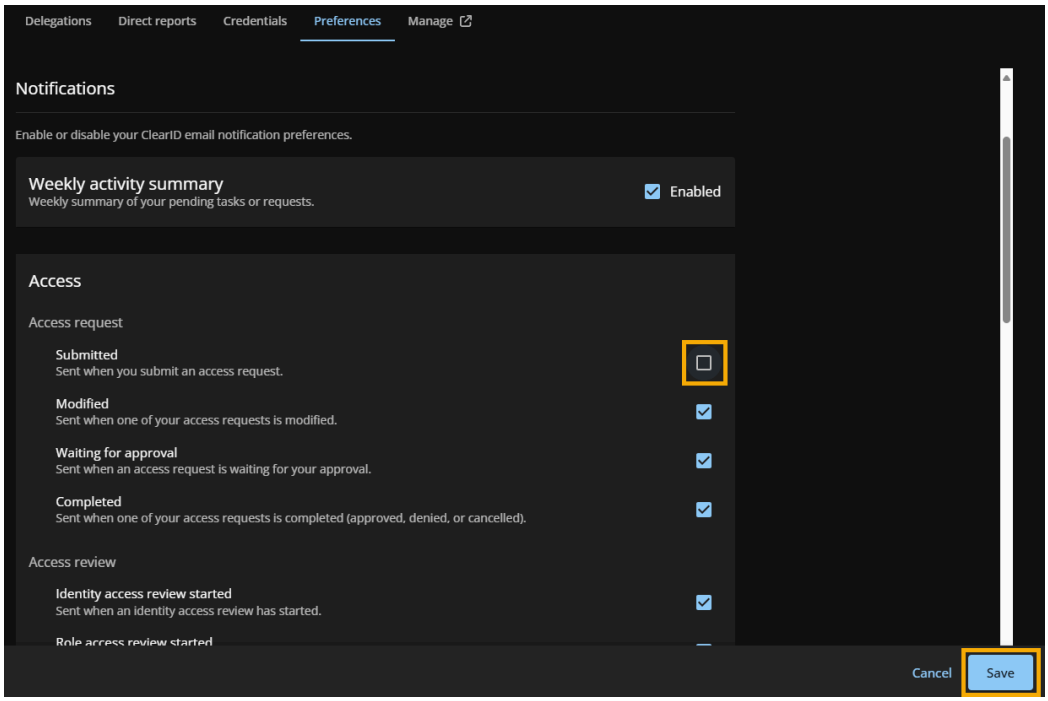
Your notification preferences only apply to your user profile. All email notifications are turned on by default.

TIP: Use the Weekly activity summary email to keep track of your pending tasks and requests.

Procedure

1 In the ClearID web portal, click **My Profile** > **Preferences**.

2 In the *Notifications* section, configure your notification preferences as needed.
   a) Clear the checkbox to the right of each notification that you don't want to receive.



3 Click **Save**.

Related Topics

About email notifications on page 180

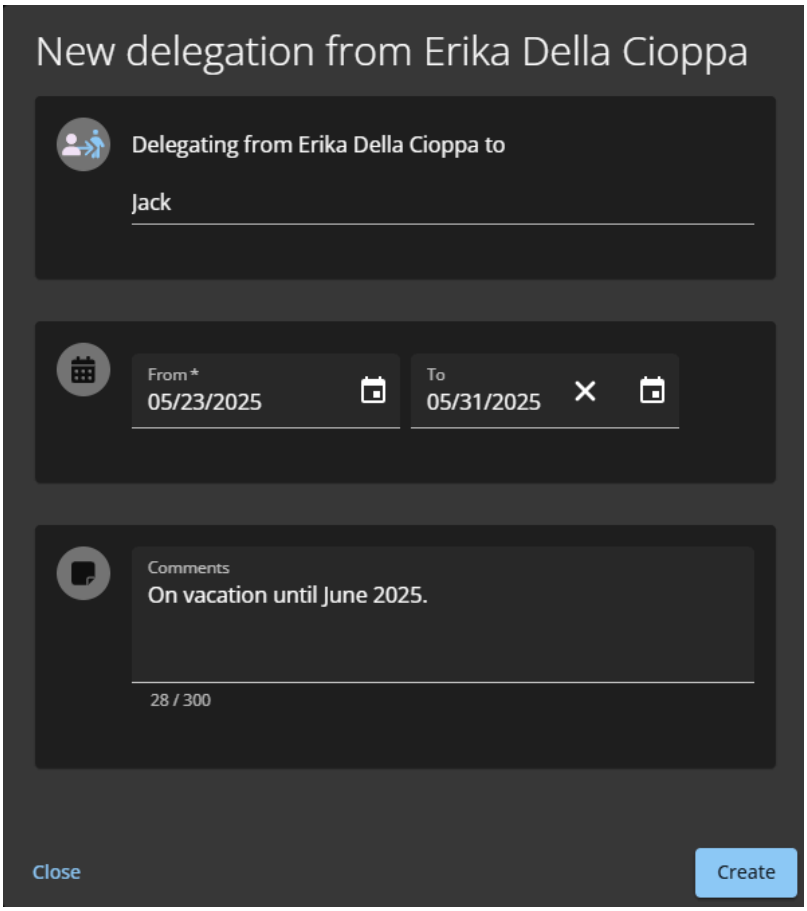
About delegation

In Genetec ClearID™, delegation is the process of transferring Genetec ClearID™ tasks within your organization, for example, due to a vacation or sabbatical. Tasks may be transferred among site owners, area owners, area managers, role owners, role managers, supervisors, and visit event approvers.

Planned delegation

In this situation, the delegation requirement is known about in advance and is planned for by the permission owner. For example, a planned vacation, sabbatical, or maternity leave.

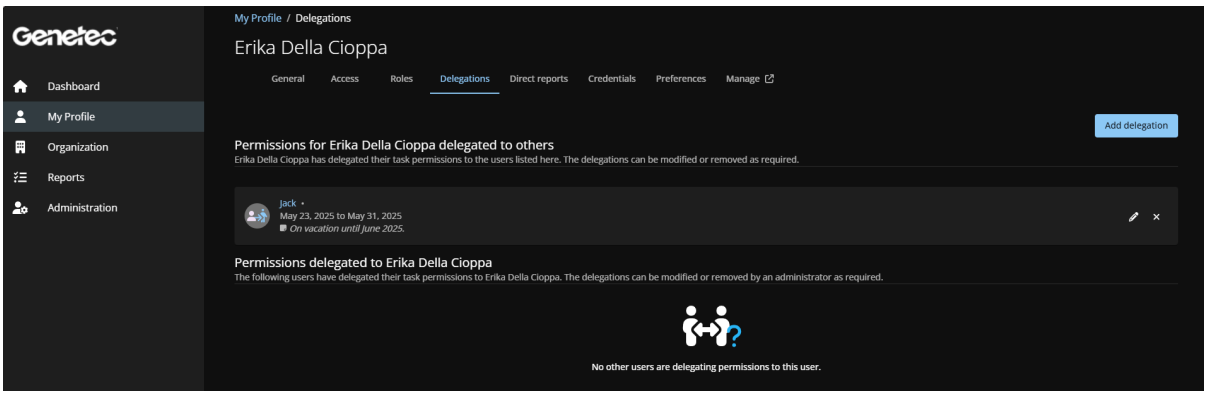
A delegate is then temporarily given the same permissions as the person delegating responsibility so that they can manage the delegated tasks.



For example, if an area manager delegates to you, you are temporarily given permissions to perform that area manager's tasks. The delegated tasks are then displayed in the **My tasks** section of your **Dashboard**.

Permissions for *user* delegated to others

- If required, you can delegate to more than one person. This can be useful when tasks are performed by multiple people. For example, different supervisors or shift workers.
- You cannot delegate tasks that have been delegated to you because this would potentially create a trust conflict. When you create a delegation you are only delegating your own tasks.
- The delegation period can be modified ( ) or turned off ( ) early if your delegation requirements change.



Permissions delegated to *user*

Permissions can also be delegated to you from another person.

NOTE: You cannot delegate permissions to a user that is already delegating to you. In this situation, the following error message is displayed: The specified user is already delegating permissions to you. That delegation must be removed before you can delegate to them.

Unplanned delegation

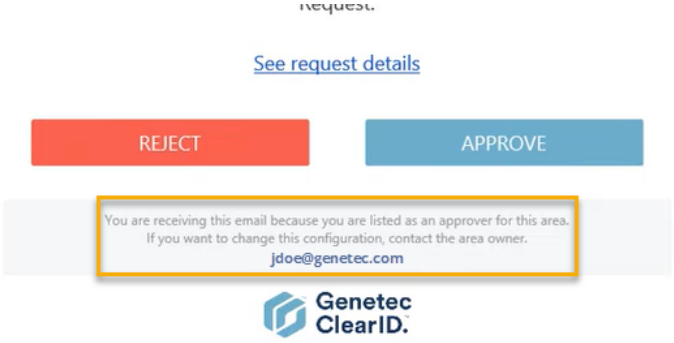
From time to time, an unplanned delegation might be required because the delegator is not available to set the delegation. For example, in the event of an unplanned absence or period of unavailability. In this situation, an account administrator can perform a delegation on behalf of an unavailable delegator. The account administrator can also modify or remove a delegation if required.

IMPORTANT: Administrator permissions cannot be delegated. You can only assign administrator permissions through the normal official channels.

Delegation email notifications

Any email notifications associated with delegated tasks are sent to both the original permission owner and the delegate. Using these email notifications or the **My tasks** page, the delegate can access and perform the delegated tasks.

Email notifications sent to delegates include contact details in the email notifications footer so that the delegate can contact the permission owner if they want to request changes to the delegation configuration.



Delegating tasks to another user

Site owners, area owners, area managers, role owners, role managers, supervisors, and visit event approvers can temporarily transfer their Genetec ClearID™ task responsibilities to someone else in their organization by delegating their tasks to another user. For example, during a planned vacation, sabbatical, and so on.

Before you begin

Learn about delegation.

BEST PRACTICE: Before delegating your tasks, consider contacting the potential delegate to make them aware of the delegation and confirm their availability.

What you should know

- Only the logged in user can delegate their ClearID tasks to one or more users.
- The delegation period can be modified ( ) or turned off ( ) early if your delegation requirements change.
- An account administrator can also perform an unplanned delegation on the behalf of an unavailable delegator. For example, in the event of an unplanned absence or period of unavailability.

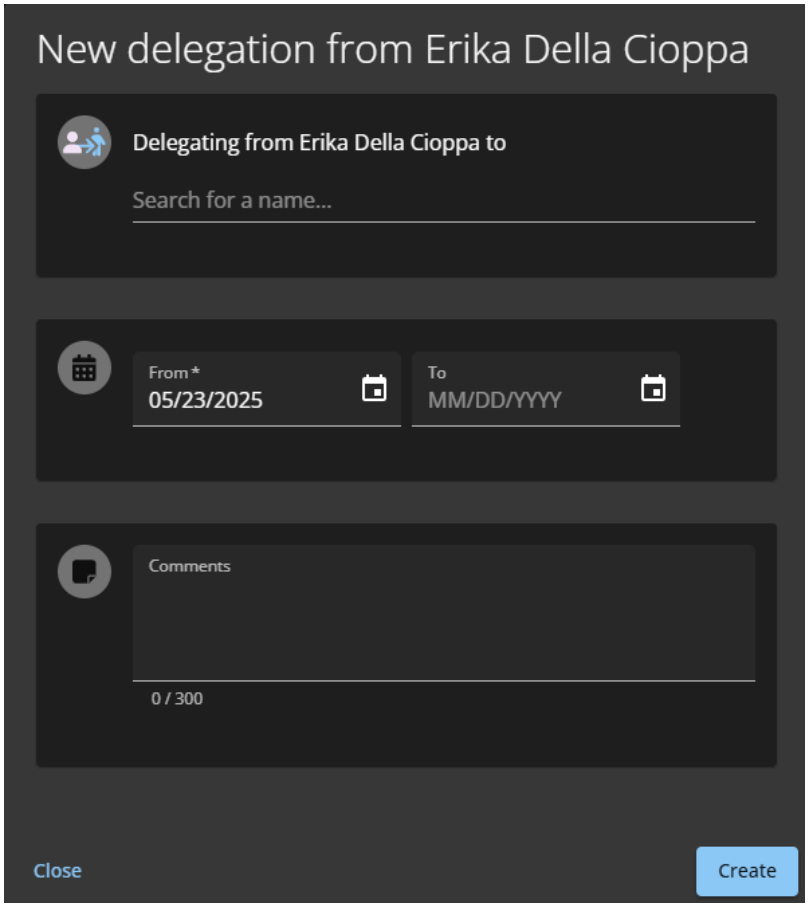
IMPORTANT: Administrator permissions cannot be delegated. You can only assign administrator permissions through the normal official channels.

Procedure

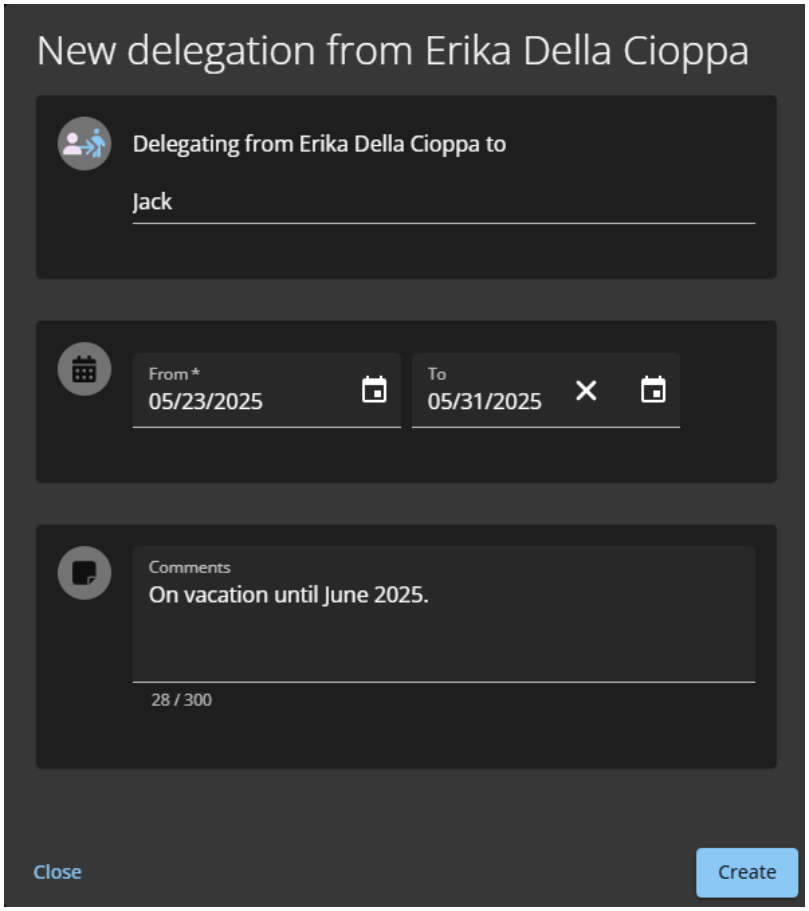
1 From the *Dashboard*, click **My Profile** > **Delegations**.

2 Click **Add delegation**.

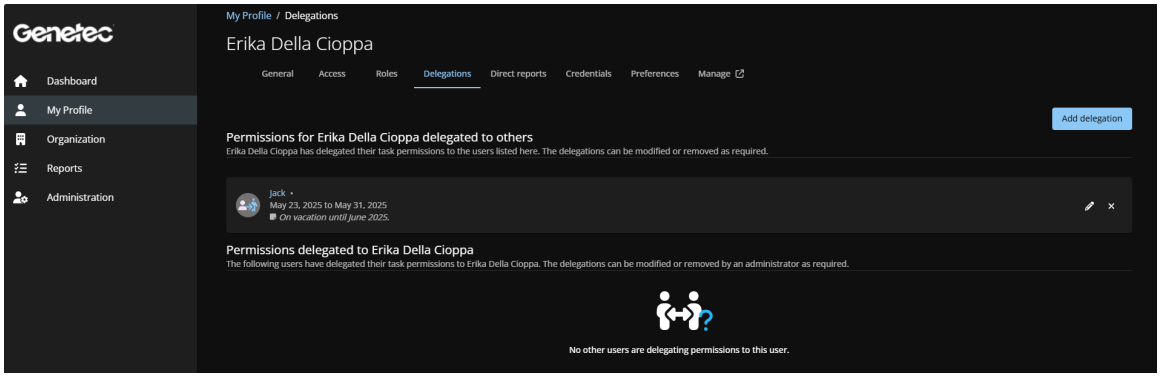
3 Complete the fields



a) Search for or enter the name of the user that you want to delegate your ClearID tasks to.
b) Enter the **From** and **To** dates for the period of time that you want the delegation in place.
c) In the **Comments** field, add an explanation about why your tasks are being delegated to other users.



4 Click **Create**.



5 (Optional) In the **Permissions for *user name* delegated to others** section, click to modify an active delegation.

a) Enter the **From** and **To** dates for the period of time that you want the delegation in place.

b) In the **Comments** field, add an explanation about why your tasks are being delegated to other users.

c) Click **Update** to save your changes.

Your delegation is now active and will automatically expire on the date specified.

6 (Optional) Click to remove a delegation.

a) In the **Remove delegation** dialog, click **Remove** to confirm the delegation is no longer required.

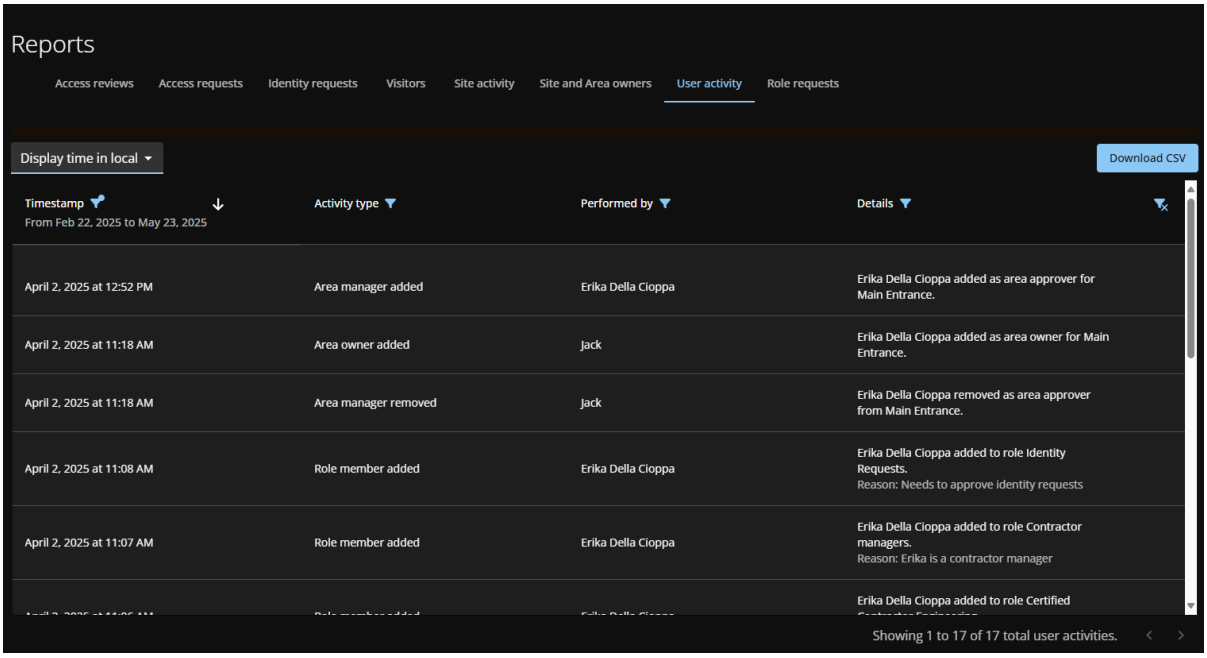
Example

Watch this video to learn more. Click the **Captions** icon (**CC**) to turn on video captions in one of the available languages.

About user activity report

In Genetec ClearID™, a user activity report is an audit trail of all activities related to users. The report includes timestamp information, activity type, who activity was performed by, and a details section including reason information.

User activity report



As an account administrator, you can use this report to view all data corresponding to the following activities:

- Area owner added or removed
- Area manager added or removed
- Identity access granted or removed
- Role access granted or removed
- Role owner added or removed
- Role manager added or removed
- Role member added or removed
- Supervisor added or removed
- Identity created, updated, or deleted
- Custom field created, updated, or deleted
- Custom field section created, updated, or deleted

You can use filters to help refine the report search results by timestamp, activity type, performed by, and details.

Related Topics

Viewing a user activity report on page 193

Viewing a user activity report

You can consult the *User activity* report to review all user-related activities. Use the report for auditing purposes, download a copy to attach to an audit request to review offline, or manipulate or consolidate data in a spreadsheet for other audiences.

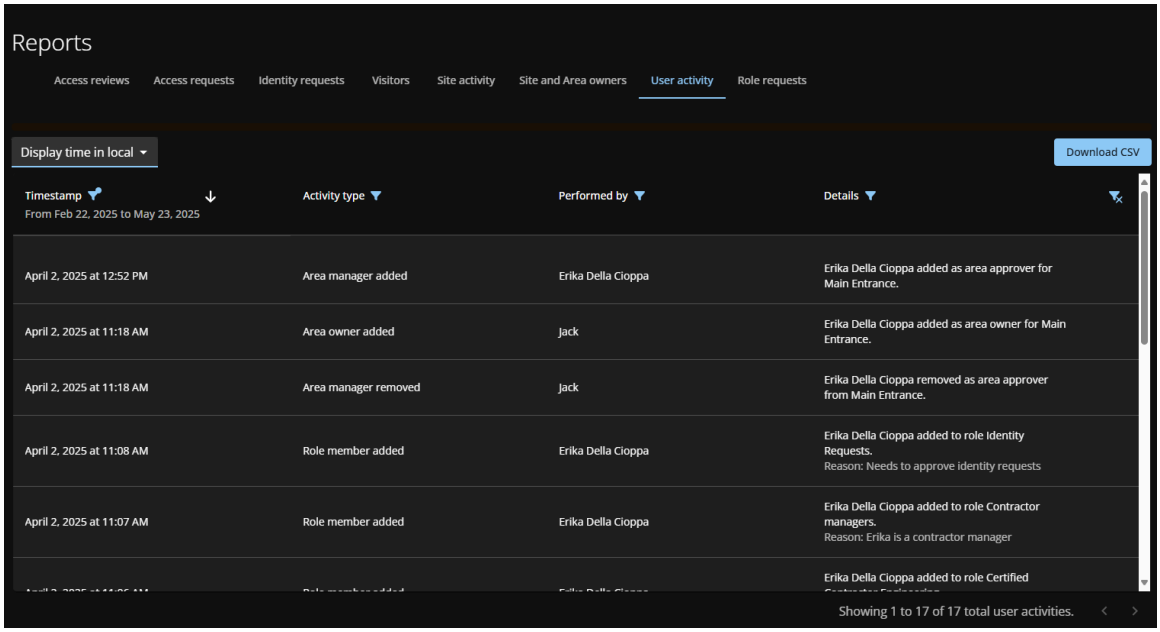
Before you begin

To view the *User activity* report and review audit trail information, ensure that you're an account administrator.

NOTE: The *User activity* report is empty if there is no activity logged by area owners or managers, role managers, or role members in your Genetec ClearID™ system.

Procedure

1 From the *Home* page, click **Reports** > **User activity**.

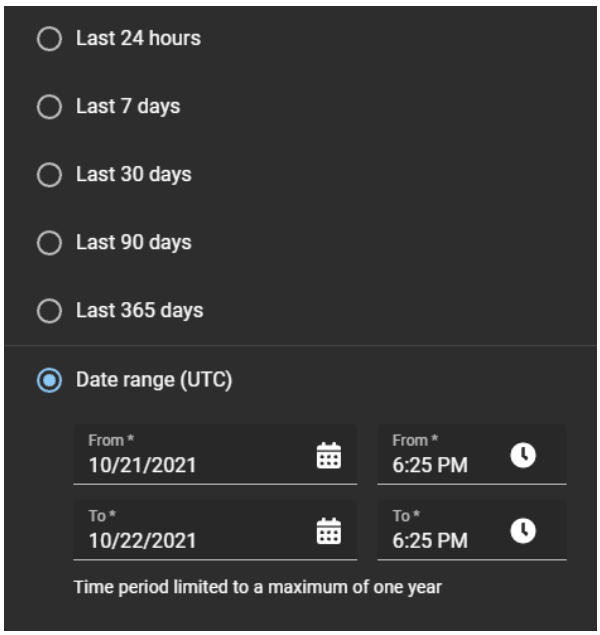


2 In the *User activity* report tab, select the display time setting that you require.

- **Display time in local:** Report times are displayed using the system time from the computer of the logged-in user.
- **Display time in UTC:** Report times are displayed using Coordinated Universal Time (UTC).

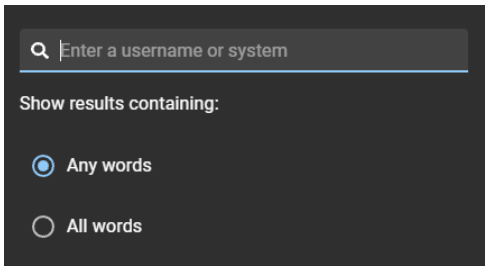
3 Filter the report based on your required criteria:

- **Timestamp:** In the **Timestamp** column, click to filter the results by date. Select a pre-defined date range from the choices available or enter a specific date range using the date range picker.

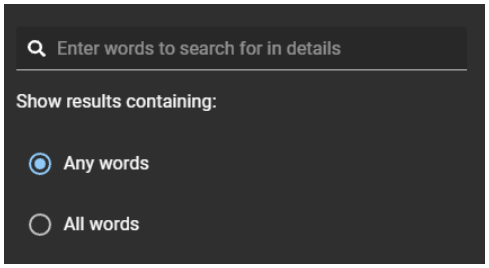


(Optional) Use the sort icons (and) to display the results in descending or ascending order.

- **Activity type:** In the **Activity type** column, click to filter the results by activity type:
  - Area owner added or removed
  - Area manager added or removed
  - Identity access granted or removed
  - Role access granted or removed
  - Role owner added or removed
  - Role manager added or removed
  - Role member added or removed
  - Supervisor added or removed
  - Identity created, updated, or deleted
  - Custom field created, updated, or deleted
  - Custom field section created, updated, or deleted
- **Performed by:** In the **Performed by** column, click to open a search dialog and filter the results by who performed an activity. For example, search for tasks performed by a particular user, or tasks performed automatically by the system.



- **Details:** In the **Details** column, click to open a search dialog to search the details or reason using a search criteria.



- **(Optional):** Click to reset filter selections.

4 Click **Download CSV** to download a copy of the *User activity* report.
Follow your browser prompts to complete downloading the exported file.

The file is exported as a *.CSV* file to the default download location for your browser. By default the exported file is created using the report name and download date. For example, *UserActivities_2022-02-14.csv*.

NOTE: The columns and entries in the CSV file can vary depending on the filters you selected when you downloaded the report.

Related Topics

About user activity report on page 192

User levels

The following information can be used to help you understand which actions the users or roles in Genetec ClearID™ can perform.

Identity management

Actions	Account owners (and API key)	Site owners	Area owners	Area managers	Identity supervisors	Authenticated users
Create identities	✓ [1]					
Update identities	✓ [1]					
View private information about identities	✓ [1]					
List identities when adding to an area or role	✓ [1]	✓	✓	✓	✓	✓
Create sites	✓ [1]					
Delete identities	✓ [1]					
View direct reports	✓ [1]				✓	
Manage direct reports	✓ [1]				✓	
Transfer direct reports	✓ [1]				✓	

[1] Users assigned as a delegate for another user do not inherit the permission.

Area management

Actions	Account owners (and API key)	Site owners	Area owners	Area managers	Identity supervisors	Authenticated users
Create and delete sites	✓ [1]					
Edit site details	✓ [1]	✓				

Actions	Account owners (and API key)	Site owners	Area owners	Area managers	Identity supervisors	Authenticated users
Assign site owners	✓ 1	✓ 1				
Create and delete areas	✓ 1	✓				
Edit area automatic provisioning attributes	✓ 1	✓				
Edit area name	✓ 1	✓				
View all private areas of a site	✓ 1	✓				
Assign area owners	✓ 1	✓				
Assign area managers	✓ 1	✓	✓ 1			
Edit area visibility (Public or Private)	✓ 1	✓	✓			
Edit approval workflow	✓ 1	✓	✓			
Edit area schedules	✓ 1		✓			
View area configuration and access list	✓ 1	✓	✓	✓		
Add people or roles to areas	✓ 1		✓	✓		
Remove people or roles from areas	✓ 1		✓	✓		
Approve access request for an area	✓ 1			✓	✓	
Edit period and schedule before	✓1			✓	✓	

Actions	Account owners (and API key)	Site owners	Area owners	Area managers	Identity supervisors	Authenticated users
approving access request						
Schedule area access reviews	✓	✓				
Receive and complete area access reviews	✓ [1]	✓	✓	✓		
View area access reviews report	✓	✓				

[1] Users assigned as a delegate for another user do not inherit the permission.

Role management

Actions	Account owners (and API key)	Site owners	Role owners	Role managers	Identity Supervisor	Any user on account
Create and delete roles	✓ [1]					
Assign role owners	✓ [1]					
Assign role managers	✓ [1]		✓ [1]			
Change automatic provisioning rules and configuration for a role	✓ [1]		✓			
Edit role name, description, notes	✓ [1]		✓			
List roles when adding to an area or access request	✓ [1]		✓	✓		
Manually add or remove a	✓ [1]		✓	✓		

Actions	Account owners (and API key)	Site owners	Role owners	Role managers	Identity Supervisor	Any user on account
person from a role						
Submit an access request on behalf of a role			✓	✓		
Receive and complete role access reviews			✓	✓		
Remove identities from a role	✓ [1]		✓	✓		

[1] Users assigned as a delegate for another user do not inherit the permission.

Visitor management

Actions	Account owners (and API key)	Visit requester	Requester supervisor	Site owners	Visit hosts	Area managers
Visit event						
Create a visit event		✓ [1]				
Add guests to an event or remove guests from an event		✓ [1]			✓ [1]	
Approve or reject a visit event			✓			
Approve or reject specific guest access to an area						✓
Create an event (copy event) from an existing event		✓ [1]	✓		✓ [1]	
Cancel event		✓ [1]			✓ [1]	

Actions	Account owners (and API key)	Visit requester	Requester supervisor	Site owners	Visit hosts	Area managers
View list of upcoming events		✓ [1]			✓ [1]	
View event details		✓ [1]	✓		✓ [1]	✓
Visitor management configuration						
Edit visitor management configuration (Area)	✓ [1]			✓		
Edit visitor management configuration (Site)	✓ [1]			✓		

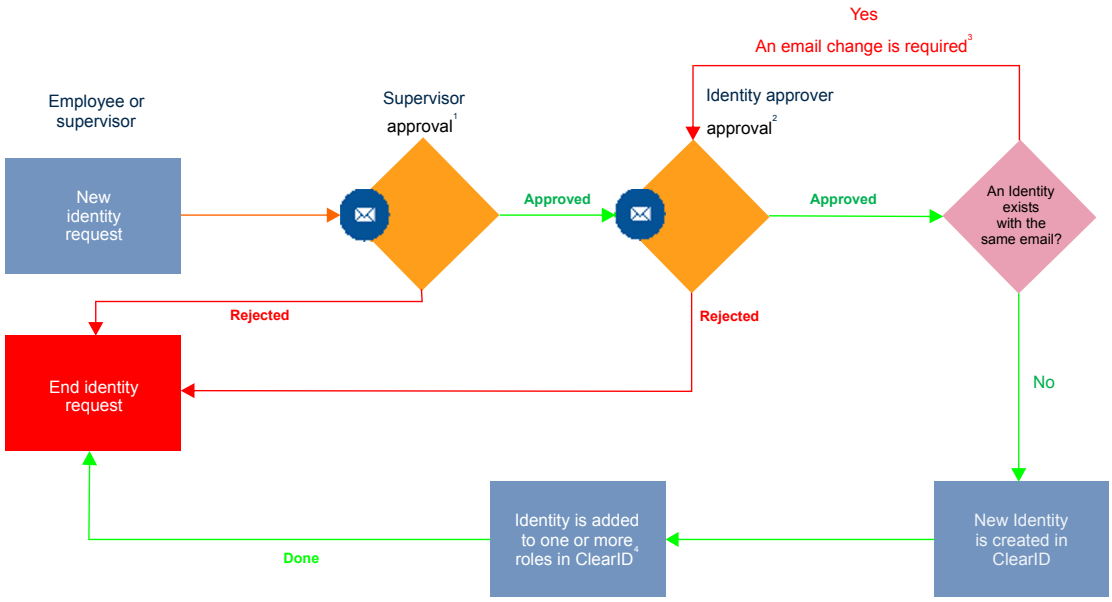
[1] Users assigned as a delegate for another user do not inherit the permission.

About identity request workflow

An identity request workflow is a series of activities performed by the system or authorized people during the life cycle of an identity request. The activities can create an individual identity, or multiple identities using a CSV import, and add each new identity to a role to inherit relevant access for a specified period.

The workflow helps automate identity request tasks, such as approving or rejecting identity requests, so that people involved in the review and approval process can focus on other tasks.

The following diagram illustrates the *identity request workflow* that occurs in Genetec ClearID™ and Synergis™.



[1] (Optional) Supervisor approval can be enabled and disabled for each identity template.

[2] (Optional) Identity approver approval can be enabled and disabled for each identity template.

[3] (Optional) Email address must be unique in the system.

[4] (Only if applicable) Cardholder is added to corresponding cardholder group in Security Center.

Related Topics

About workflows on page 12
Identity Request Feature Note (2 pages)

Creating an identity template

Before you can submit an identity request, you must create your identity templates.

Before you begin

- Familiarize yourself with workflows.
- Create the roles that will be allowed to request identities.
- (Optional) Create roles containing the role access your identity templates will use.
- (Optional) If you want to use Supervisor approvals, add a supervisor for each identity that can request an identity.

What you should know

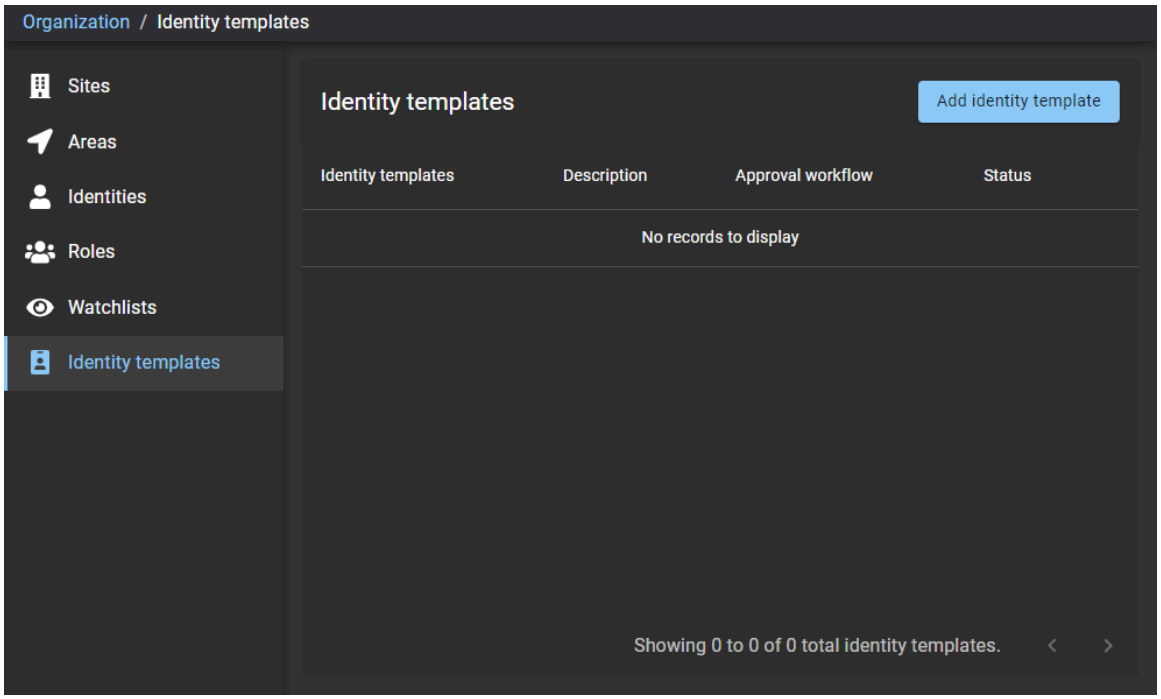
Only an account administrator can create an identity template.

Create identity templates to address the identity requests that your organization frequently encounters.

- You can create identity templates with predefined role access to suit different requirements. For example, identity requests for different types of contractors, or identity requests for large groups of specific employees who require access to a specific site or building.
- When an identity request is submitted using an identity template, the identity is added as a role member to the roles that apply to the template and inherits the associated role access.

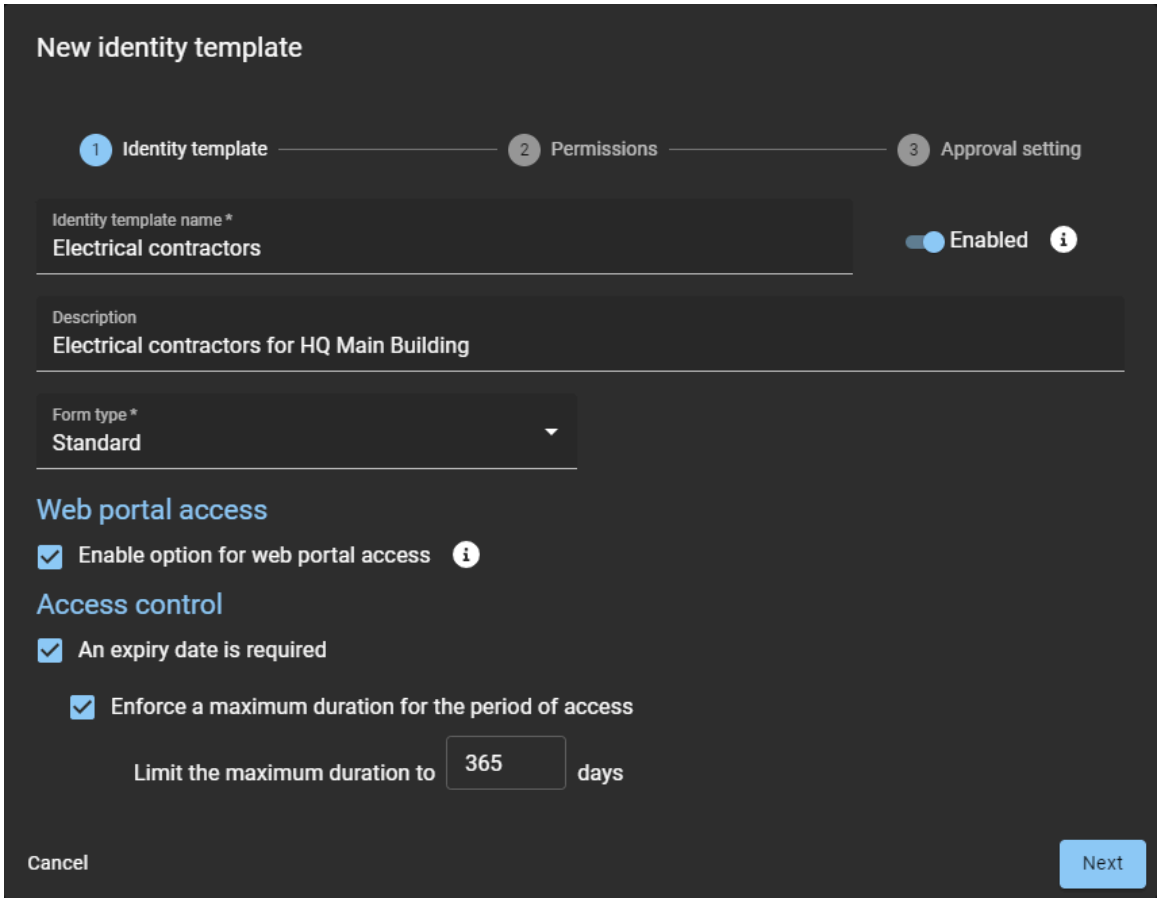
Procedure

1 Click **Organization** > **Identity templates**.



2 Click **Add identity template**.

3 In the *Identity template* section, complete the fields or configure the settings as required:



- **Identity template name:** Enter a name that summarizes the type of identity requests that the template is intended for. For example, Electrical contractors.
- **Description:** Enter a meaningful description that describes the purpose of your template. For example, Electrical contractors for HQ Main Building.
- **Form type:** Standard is the default.
- **Enabled:** Move the slider to the **Enabled** position for this template to be available for selection when requesting an identity. Enabled is the default.

a) In the *Web portal access* section, configure the option that you require.

- **Enable option for web portal access:** Select the check box if you want to display the web portal access option when requesting an identity.

  NOTE: When requesting multiple identities the availability of the web portal access option is dependent on your template configuration.

  - If your template does not include the web portal access option, the web portal access fields are ignored.
  - If your template does include the web portal access option, the web portal access fields are processed.

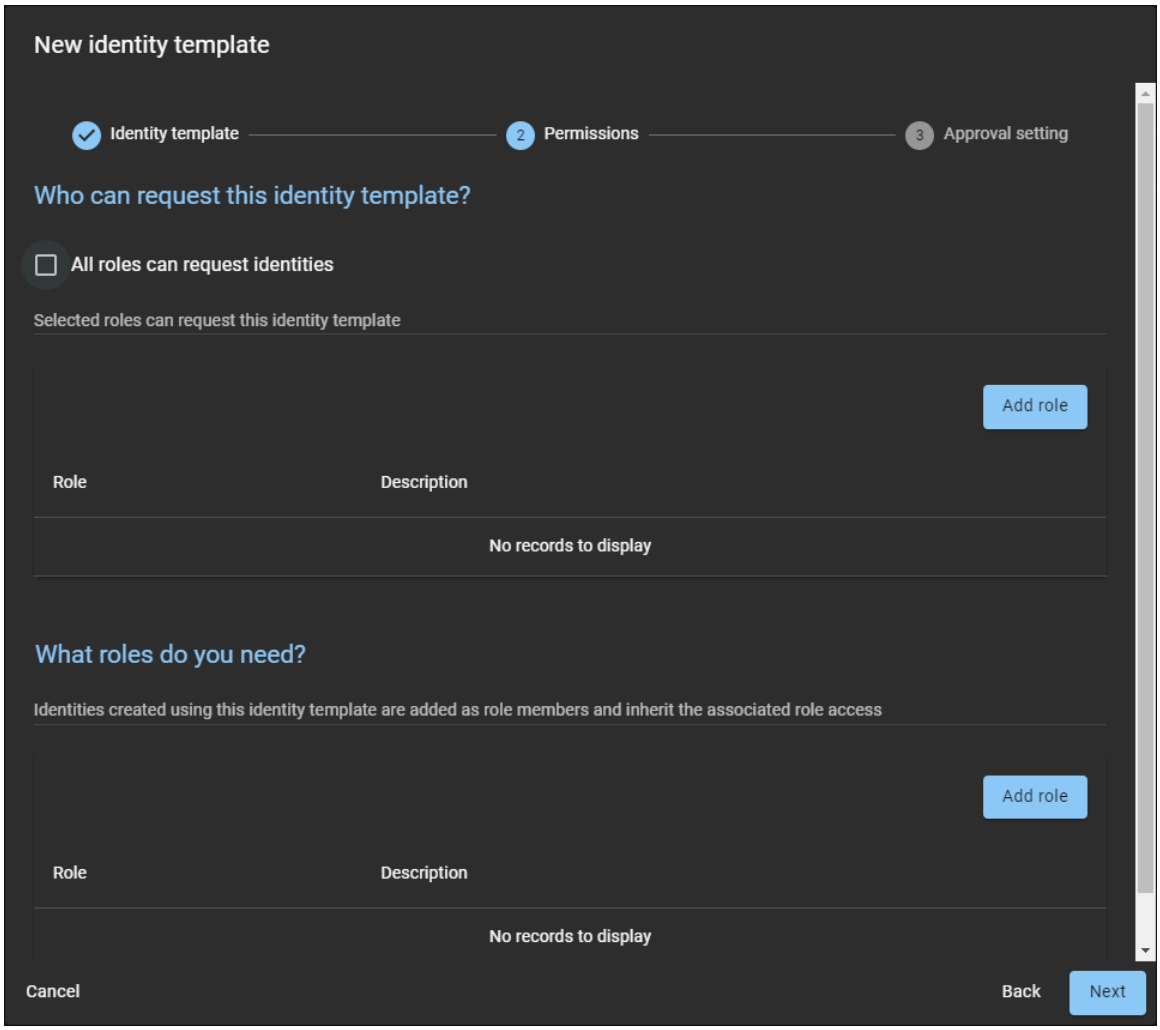
b) In the *Access control* section, configure the options that you require.

- **An expiry date is required:** Select the check box if you want to enforce an expiry date when creating identity requests.
  - **Enforce a maximum duration for the period of access:** Select the check box if you want to specify a maximum duration when creating identity requests.

- **Limit the duration to** *nnn* **days:** Specify a maximum duration. For example, 365 days.

c) Click **Next**.

4 In the **Permissions** section, configure the settings or add roles as required:



a) In the **Who can request this identity template?** section, do one of the following:

- If you want all users to be able to select this identity template, select the **All users can request identities** check box.
- If you want to select specific roles, click **Add role**.

NOTE: If you selected **All users can request identities** proceed to step 6.

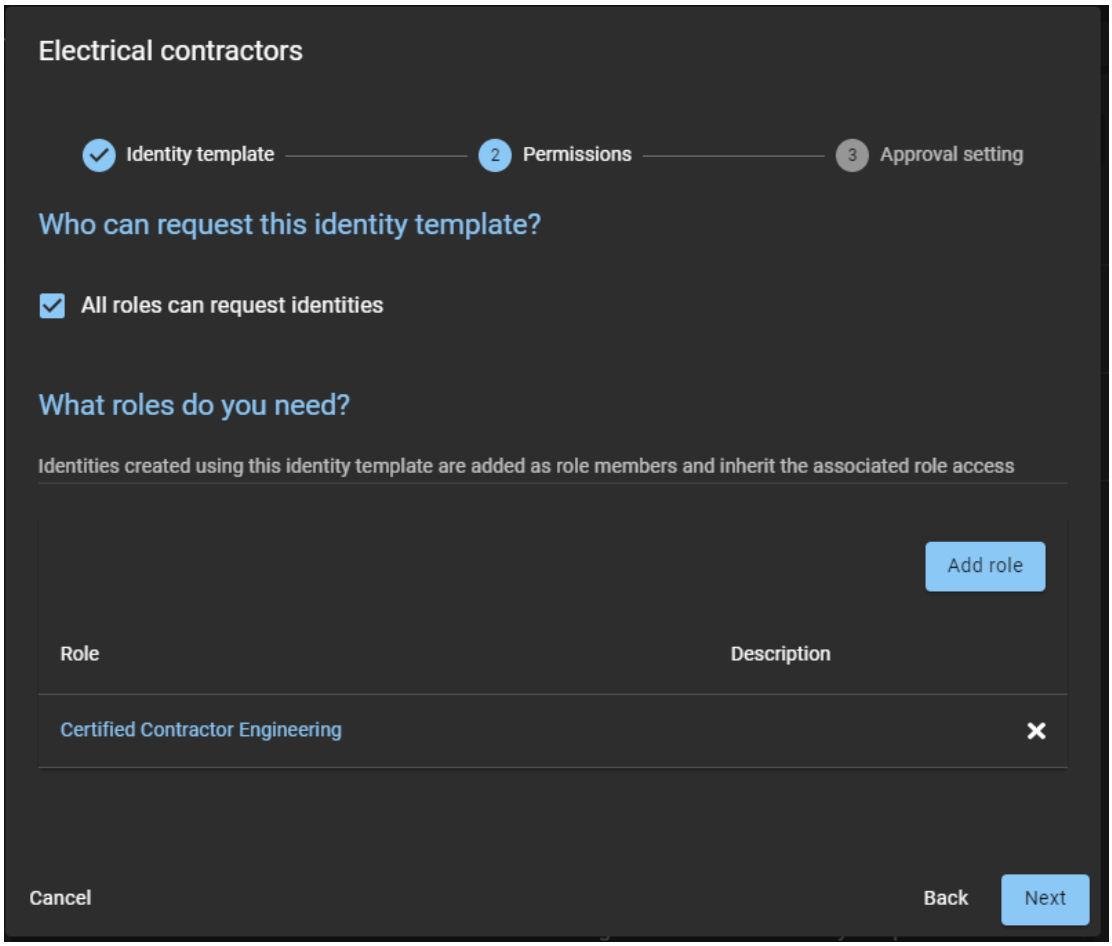
5 If you clicked **Add role**, search for or select one or more roles and click **Add**.

NOTE: The roles that you add in the **Who can request this identity template?** section determine who can request identities using this template. For example, you might add a role, so that only *Contractor managers* can request identities. Another example could include buildings with tenants spaces, for that situation you might want to create *Tenant managers*.

6 (Optional) In the **What roles do you need?** section, add the roles that you require.

a) Click **Add role**.

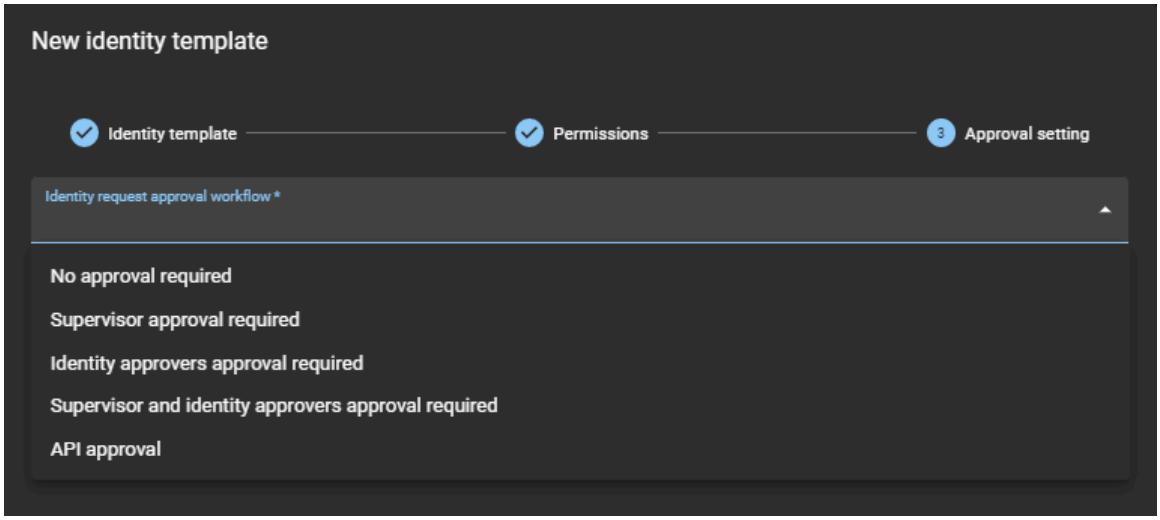
b) Search for or select one or more roles and click **Add**.



NOTE: The roles that you add in the **What roles do you need?** section determine the access that the identity inherits when an identity is requested using this template. For example, an electrical contractor role could be setup with access to rooms containing electrical infrastructure.

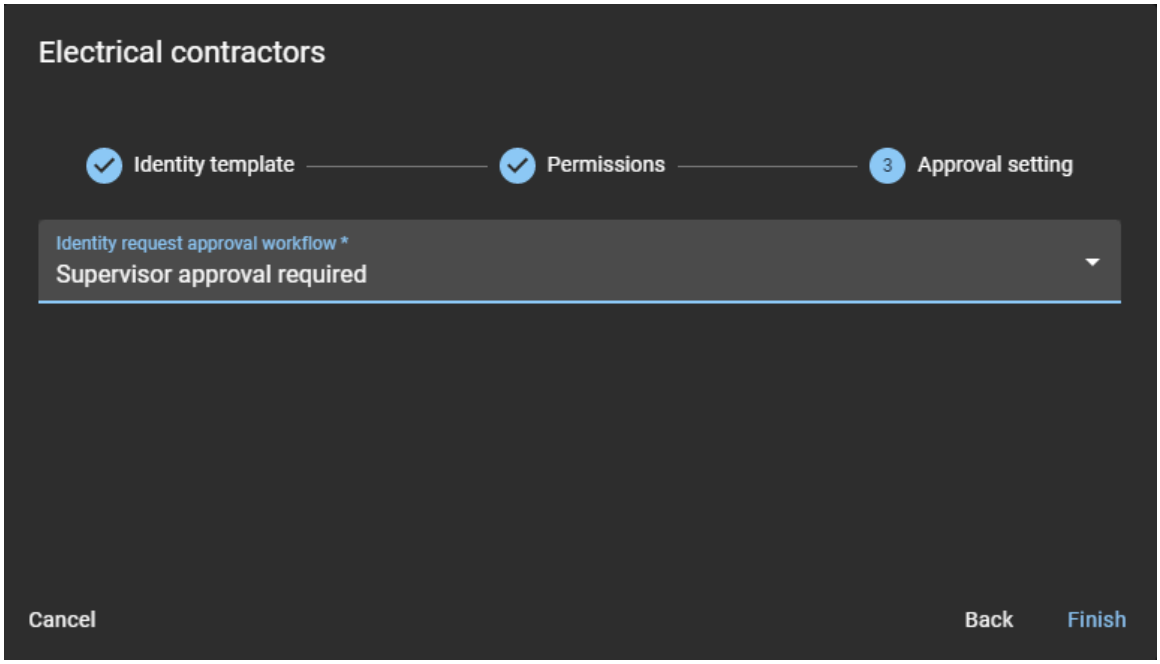
c) Click **Next**.

7 In the **Approval setting** section, select the **Identity request approval workflow** that you require.



- **No approval required:** Automatically approved.
- **Supervisor approval required:** Approved by the supervisor of the requester.
  NOTE: If the requester has no supervisor (or is a trusted requester) the supervisor approval step is bypassed.
- **Identity approvers approval required:** If selected, identity approvers must be added.
  a. Click **Add** and choose either **Add identities** or **Add roles**.
  b. Complete the steps as prompted.
- **Supervisor and identity approvers approval required:** If selected, supervisors are already associated with the identity, however the identity approvers must be added as described previously.
  NOTE: If the requester has no supervisor (or is a trusted requester) the supervisor approval step is bypassed.
- **API approval:** API approval is only used when the identity request approval workflow is customized to handle requests from an external service.
  For example, Genetec ClearID™ LDAP Synchronization Agent, Genetec ClearID™ One Identity Synchronization Tool, or an API workflow for a plugin integration. In this situation, the request approvals are not shown in the ClearID user interface.

NOTE: If a user creates an identity request using the ClearID web portal, that user will still see their requests in the **My requests** dashboard.



8 Click **Finish**.

Your template is now ready to be used.

Example

After you finish

Request an identity.

Related Topics

Identity Request Feature Note (2 pages)

Modifying an identity template

After you have created your identity templates, you can modify the template settings or delete the template if required.

Before you begin

Create your identity templates.

What you should know

Only an account administrator can modify an identity template.

Procedure

1 Click **Organization** > **Identity templates**.

2 (Optional) If a template is no longer required click **Delete** (✕) to delete the template.

3 Click a template in the list.

4 In the *Identity template* section, make any changes that you require and click **Next**.

5 In the *Permissions* section, make any changes that you require and click **Next**.

6 In the *Approvals* section, make any changes that you require and click **Finish**.

Requesting identities

You can use the Genetec ClearID™ self-service portal to request an individual identity, or to request multiple identities using a CSV import. Using the self-service portal with optional approver workflow simplifies the approval process by only notifying the specified approvers.

Before you begin

- Familiarize yourself with workflows.

What you should know

Anyone with the required permission can submit an identity request.

NOTE: In the past, most access control solutions would typically not track or record why an identity was required.

In ClearID the identity request includes: who requested the identity, when, and the reason for the identity request.

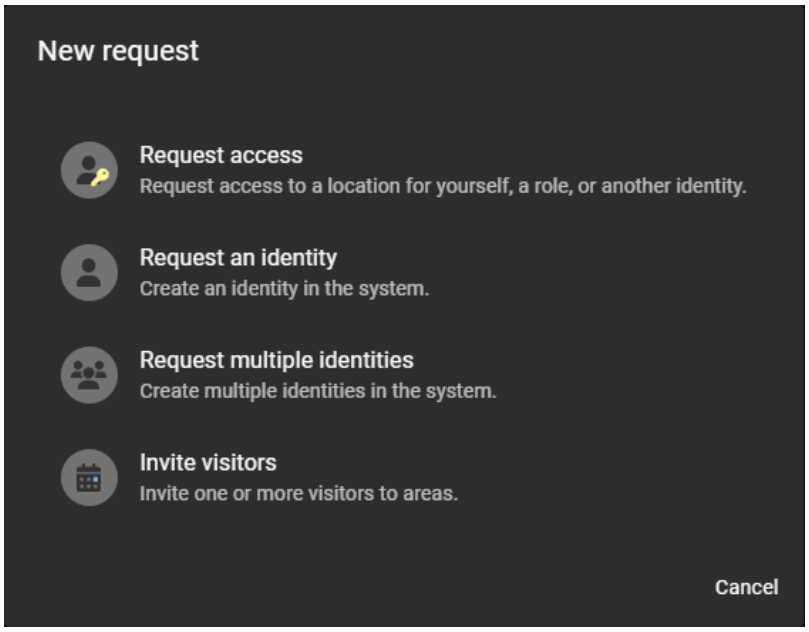
- Separate identity requests and approval workflows are created for each identity requested.
- After the request summary is confirmed, it is automatically assigned to the right individuals for approval.
- After the approval process occurs, the requester receives an email notifying them whether the identity request was approved or rejected.

Procedure

1 Log on to the self-service portal.

2 Click **Dashboard**.

3 Click **New request**.



4 In the *New request* dialog, do one of the following:
   - Requesting an identity on page 210
   - Requesting multiple identities using a CSV import on page 214
5 Click **Finish**.

After you finish

Depending on the identity template that you selected, your identity requests are either approved automatically or approvers review identity requests and approve (or reject) as required.

Related Topics

Identity Request Feature Note (2 pages)
Checking the status of identity requests on page 233

Requesting an identity

You can use the Genetec ClearID™ self-service portal to request an identity. This request adds someone (as an identity) that does not currently exist in the system. Using the self-service portal with an optional approver workflow simplifies the approval process by only notifying the specified approvers.

Before you begin

- Familiarize yourself with workflows.

What you should know

Anyone with the required permission can submit an identity request.

This task describes how to use the identity request wizard in the web portal to request an identity. The requester can use the wizard to add someone (as an identity) that does not already exist in the system.

NOTE: In the past, most access control solutions for sites typically did not track or record why an identity was required.

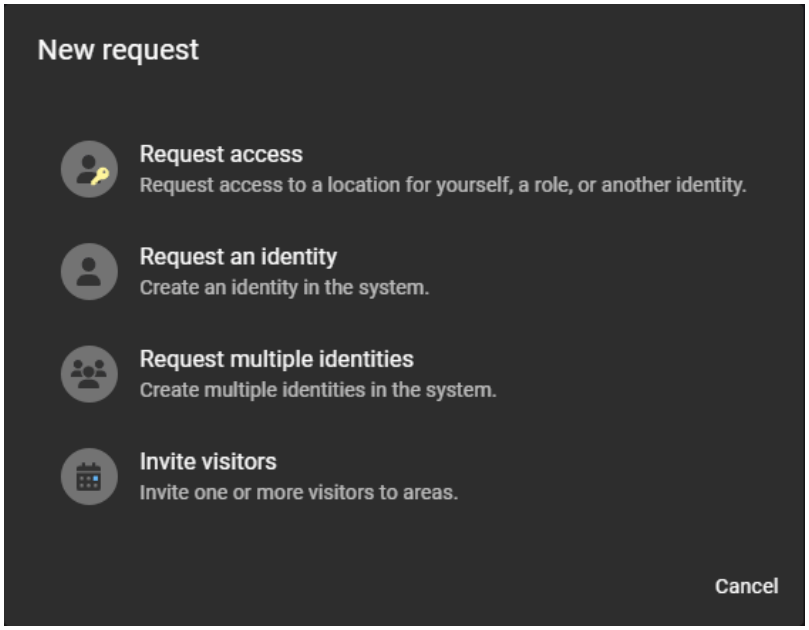
In ClearID, the identity request includes: who requested the identity, when, and the reason for the identity request.

- Separate identity requests and approval workflows are created for each identity requested.
- After the request summary is confirmed, it is automatically assigned to the right individuals for approval.
- After the approval process occurs, the requester receives an email notifying them whether the identity request was approved or rejected.

Procedure

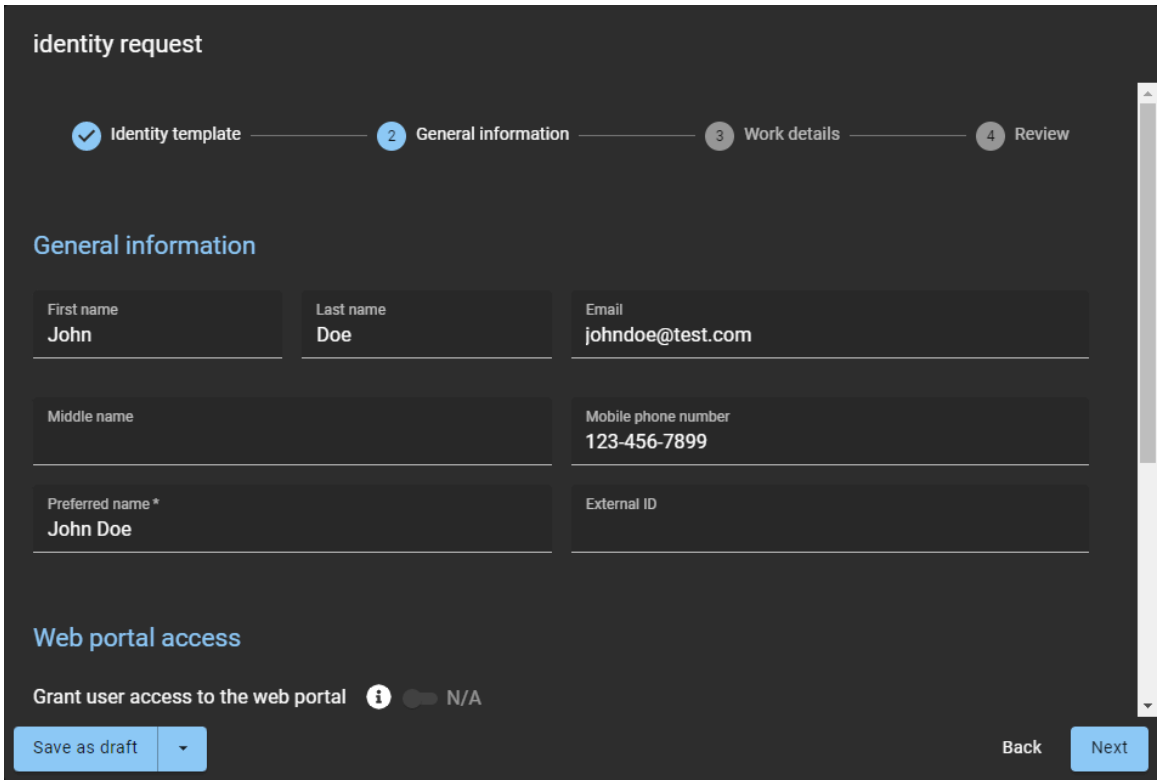
1 Log on to the self-service portal.
2 Click **Dashboard**.
3 Click **New request**.

4 In the **New request** dialog, click **Request an identity**.



5 In the *New identity request* wizard, select a template from the **Identity template** list and click **Next**.

6 In the *General information* section, complete the fields.



TIP: At any point during the creation of the request, you can click **Save as draft** to save an incomplete request (while waiting for missing information). Alternatively, you can click **Delete** if the request is no longer required. You can access your drafts from the **My requests** tab in the Dashboard.

7 (Optional) In the *Web portal access* section, move the **Grant user access to the web portal** slider to the **Enabled** position if you want to allow the identity being requested to be able to log on and use the ClearID web portal.

NOTE: The **Grant user access to the web portal** slider is disabled when the identity template you are using does not include the option for web portal access.

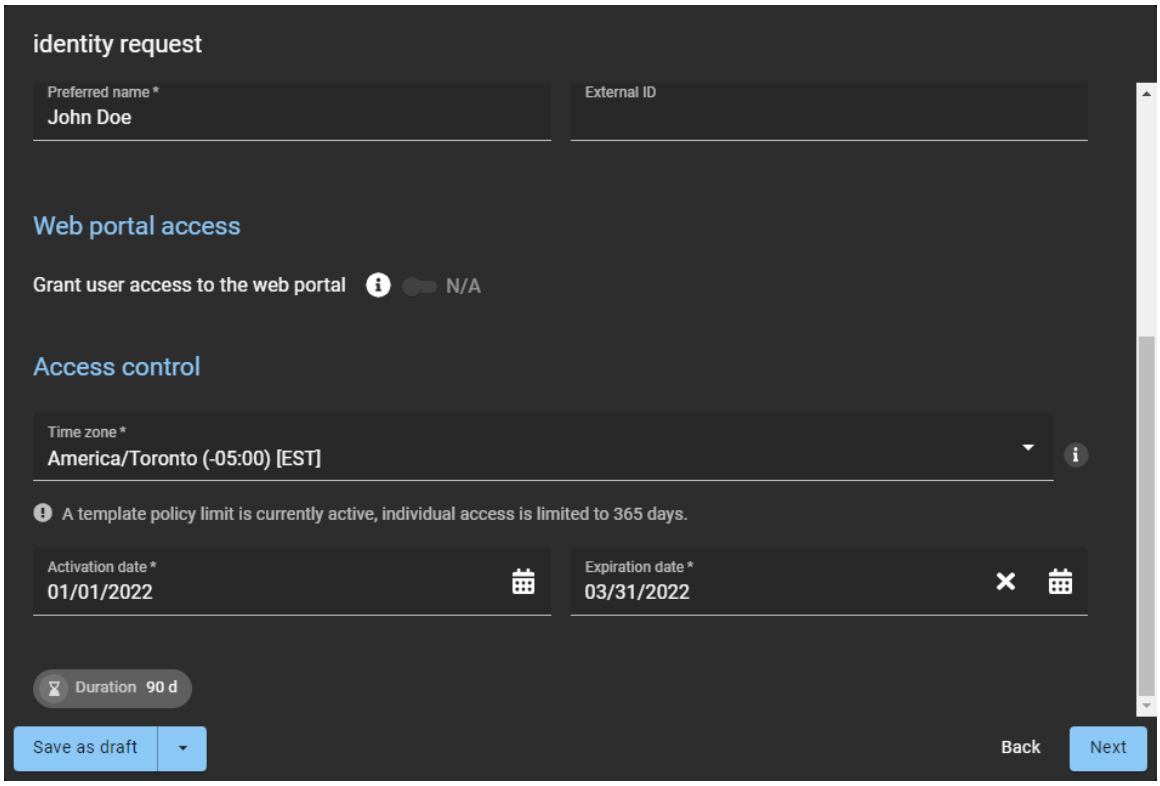
a) If you enabled web portal access enter a user name.

NOTE: The user name must be a valid email address.

8 In the *Access control* section, complete the fields. Mandatory fields are highlighted with an asterisk (*).

- **Time zone:** Select the time zone that you require.
- **Activation date:** Select the date when the requested identity should be activated.
- **Expiration date:** Select the date when the requested identity should be deactivated.

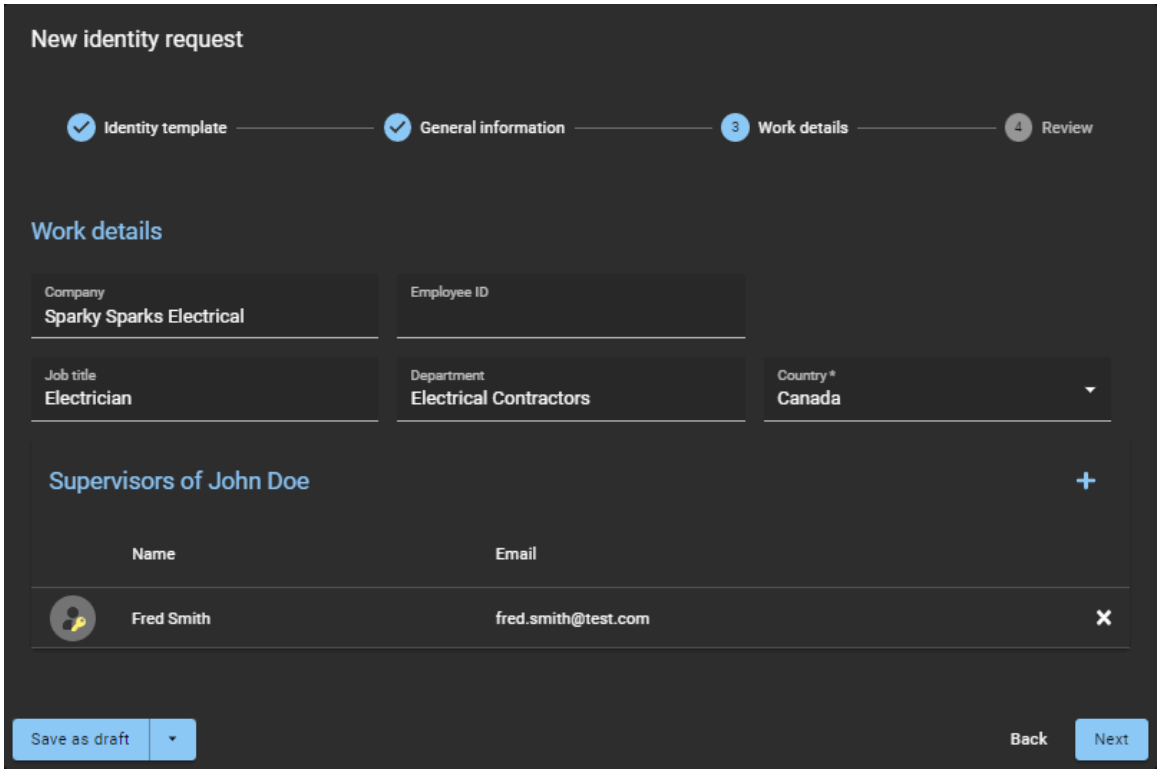
NOTE: Depending on the identity template selected, the expiration date might not be mandatory.



NOTE: The identity activation and expiration times are dependent on and triggered by the access period specified in the identity request and the time in the selected time zone. If a *maximum duration* was specified and enabled in the identity template, a message is displayed to indicate the maximum period of access that you can specify.

a) Click **Next**.

9 In the *Work details* section, complete the fields.



- **Company:** Enter the company name.
- **Employee ID:** Enter the Employee ID.
- **Job title:** Enter the job title.
- **Department:** Enter the department.
- **Country:** Select a country from the list. This country setting is only used by the *Standard* form.

  TIP: Enter the first letter of the country to jump to that part of the country list.

a) In the *Supervisors of* section, click + to add supervisors.

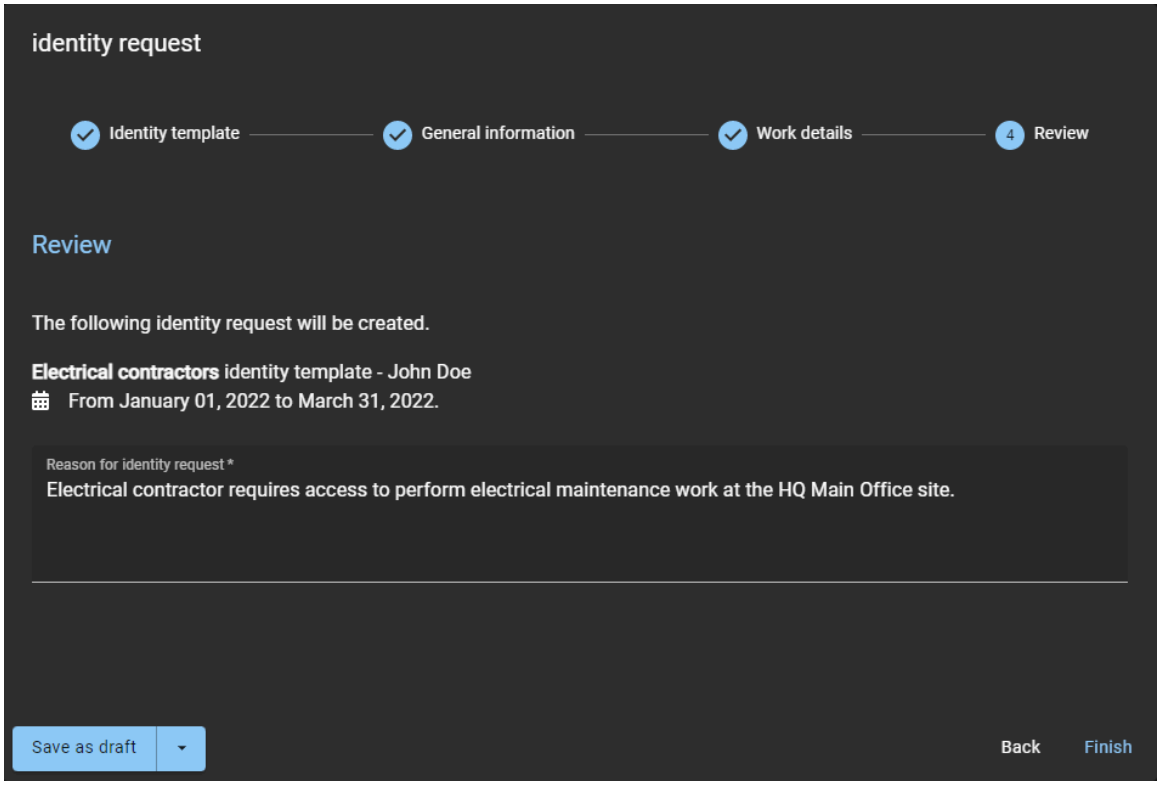
   NOTE: The supervisors specified here are the supervisors of the new identity being created. The requester is automatically added to the **Supervisors of** list by default.

b) (Optional) Add more supervisors as required.

c) (Optional) Click ✕ to remove any supervisors that are no longer required. For example, If you requested identities on behalf of someone else, you might remove yourself (if required) after the relevant supervisors are added.

d) Click **Next**.

10 In the *Review* section, verify that the identity request details are correct.



11 If the details are correct, add a reason for the request and click **Finish**.
An email notification is sent to approvers (if applicable).

Example

After you finish

Depending on the identity template that you selected, your identity requests are either approved automatically or approvers review identity requests and approve (or reject) as required.

Related Topics

Identity Request Feature Note (2 pages)

Requesting multiple identities using a CSV import

You can use the Genetec ClearID™ self-service portal to request multiple identities. This request adds multiple people (as identities) that do not currently exist in the system. Using the self-service portal with the optional approver workflow simplifies the approval process by only notifying the specified approvers.

Before you begin

- Familiarize yourself with workflows.

What you should know

Anyone with the required permission can submit an identity request.

This task describes how to use the identity request wizard in the web portal to request multiple identities using a CSV import. The requester can use the wizard to add people (as identities) that do not already exist in the system.

NOTE: In the past, most access control solutions would typically not track or record why an identity was required.

In ClearID, the identity request includes: who requested the identity, when, and the reason for the identity request.

- Separate identity requests and approval workflows are created for each identity requested.
- After the request summary is confirmed, it is automatically assigned to the right individuals for approval.
- After the approval process occurs, the requester receives an email notifying them whether the identity request was approved or rejected.

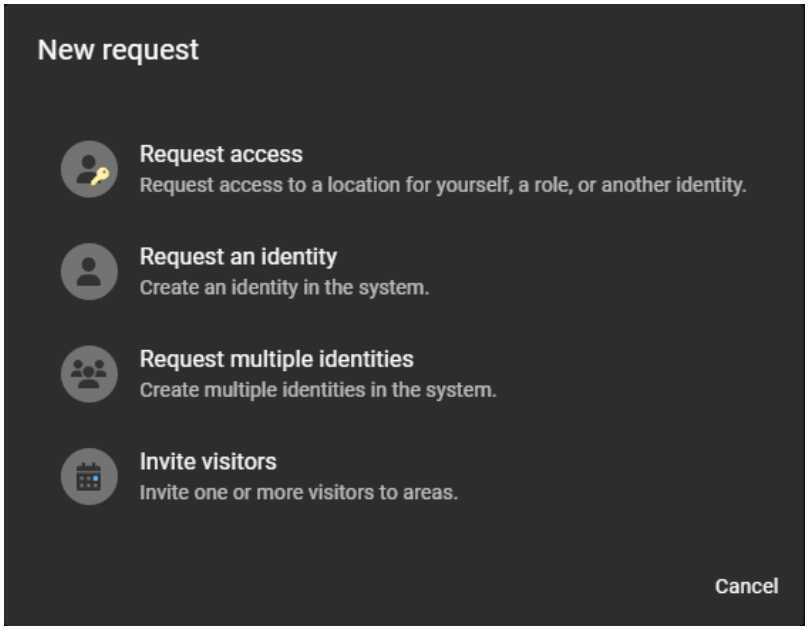
Procedure

1 Log on to the self-service portal.

2 Click **Dashboard**.

3 Click **New request**.

4 In the **New request** dialog, click **Request multiple identities**.



5 In the *Request multiple identities* wizard **Basic information** section, complete the fields.

a) In the *Request name* section **Name** field, enter a meaningful name for your request.

This meaningful name ensures that your request can be easily identified in the **My requests** or **My tasks** dashboards later.

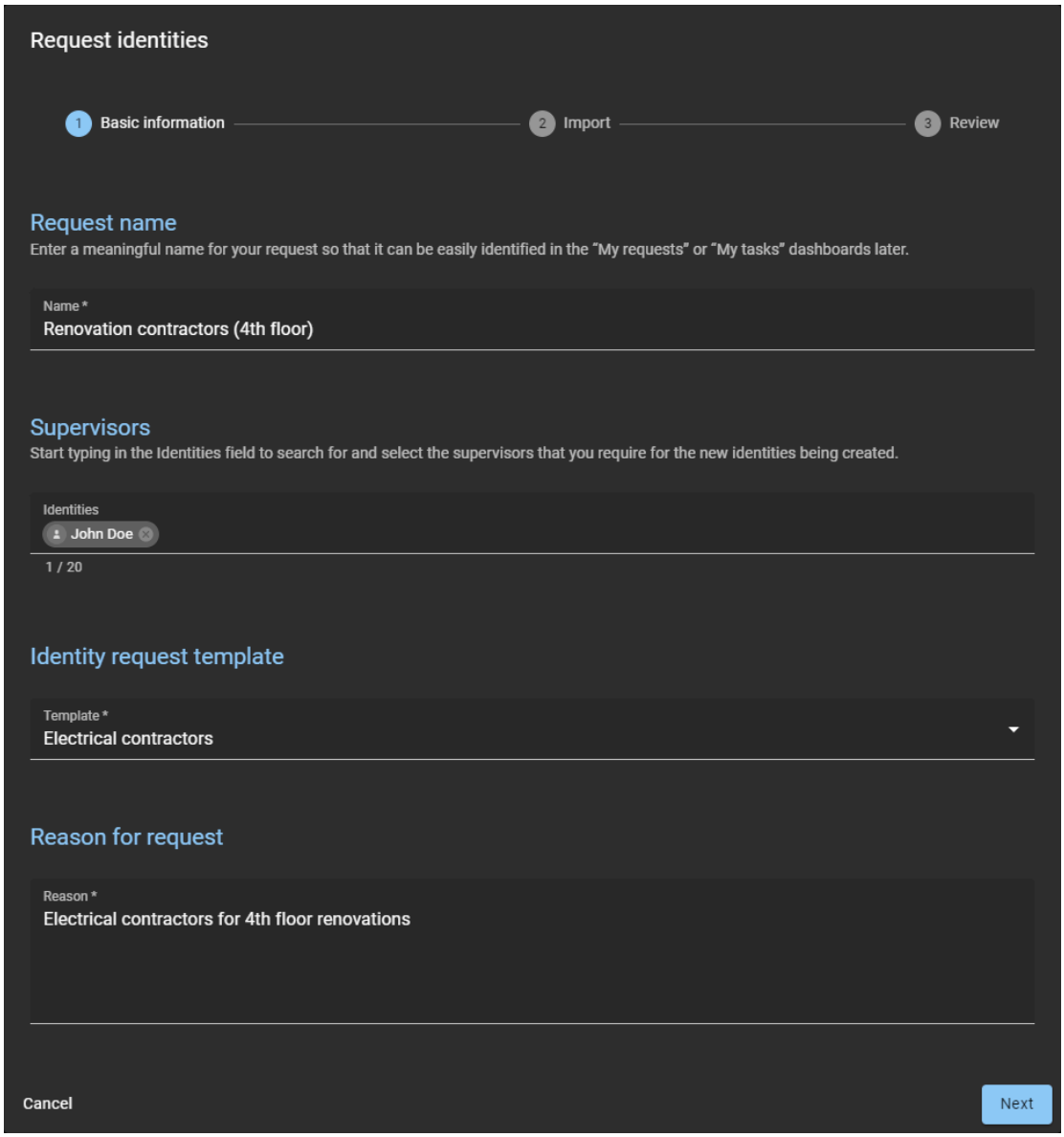
b) In the **Supervisors** section, search for and select one or more identities to assign as supervisors for the imported identities.

You can assign a maximum of 20 supervisors.

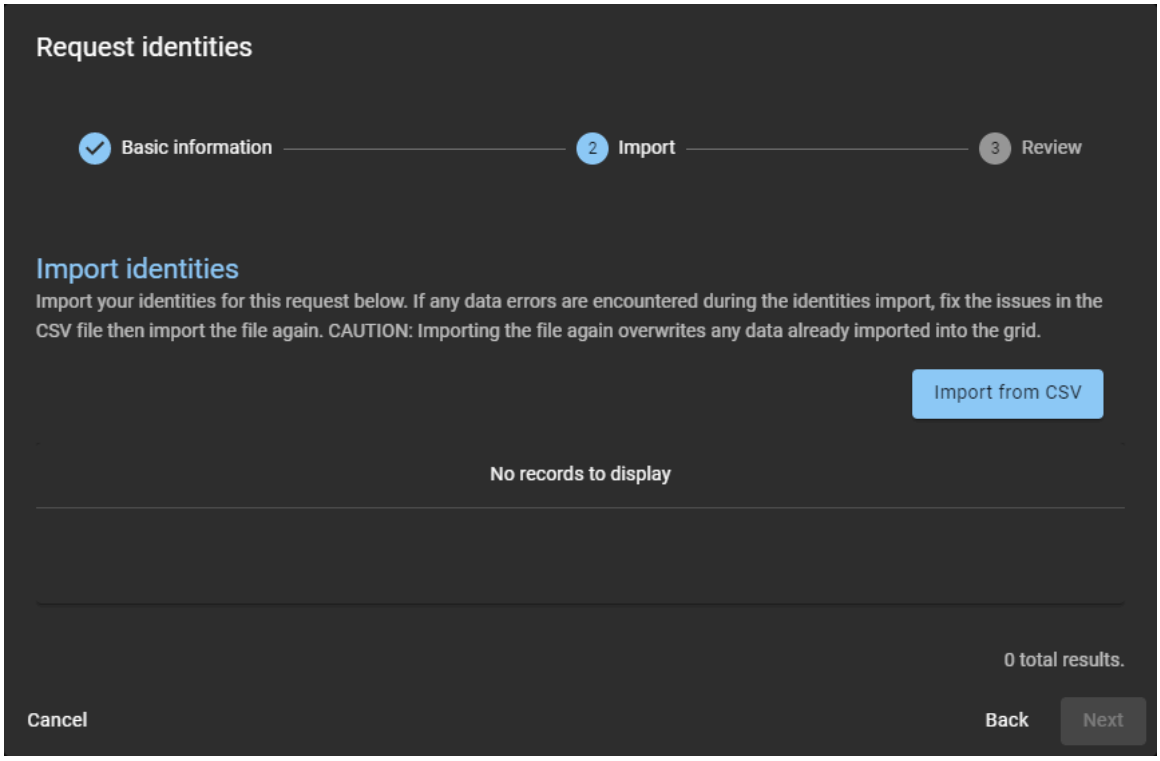
NOTE: The supervisors specified here are the supervisors of the new identities being created. The requester is automatically added to the **Supervisors** list by default.

c) In the *Identity request template* section, select a template from the list.

d) In the *Reason for request* section, add a reason for the request and click **Next**.



6 In the **Import** section, click **Import from CSV**.



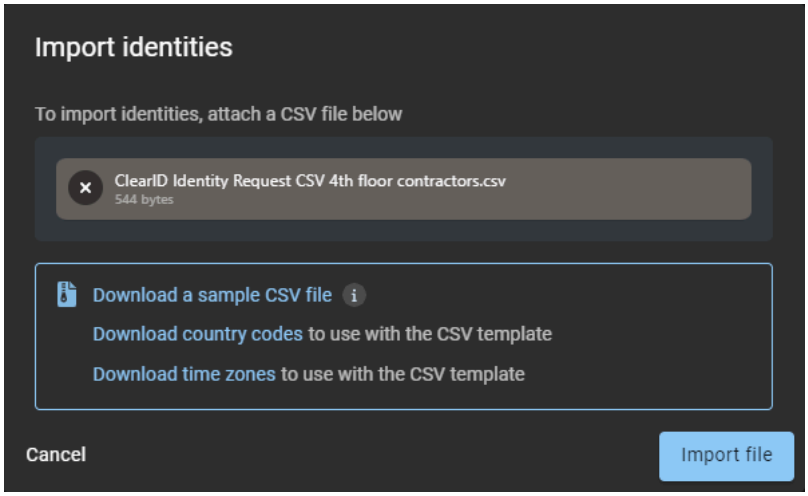
NOTE: You can import a maximum of 1000 identities per identity request.

7 Choose one of the following:

- Use an existing CSV file.
- Download a sample CSV file.

8 If you chose to use an existing CSV file, do the following:

a) Drag and drop an existing CSV file containing the identities you require or click **Browse** to select the file you require.



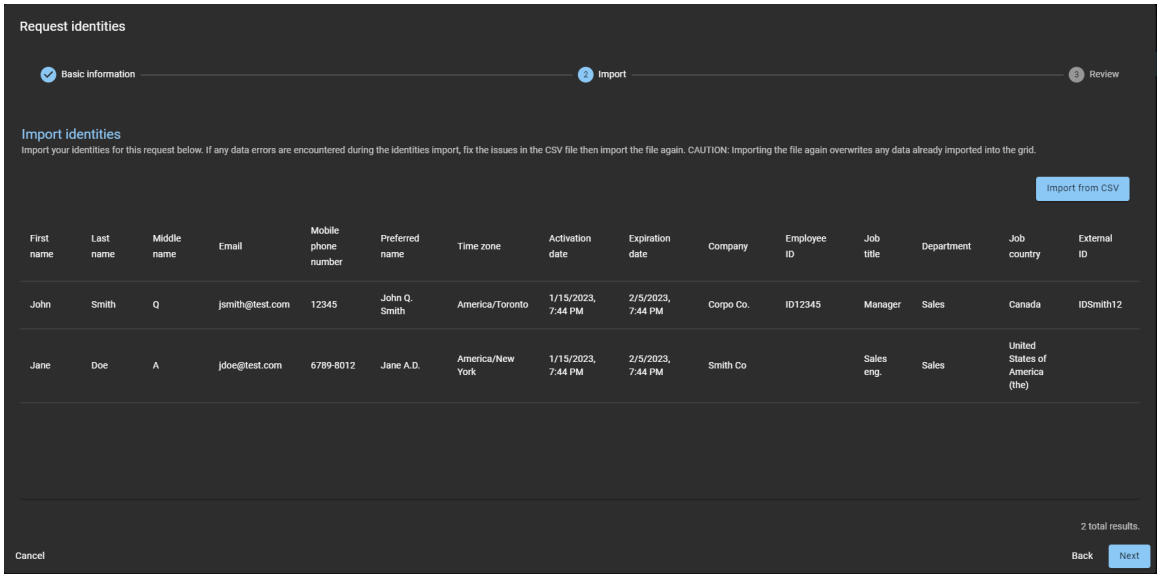
b) Click **Import file** to import the identities list.

9 Review the imported identities data and check for any errors.

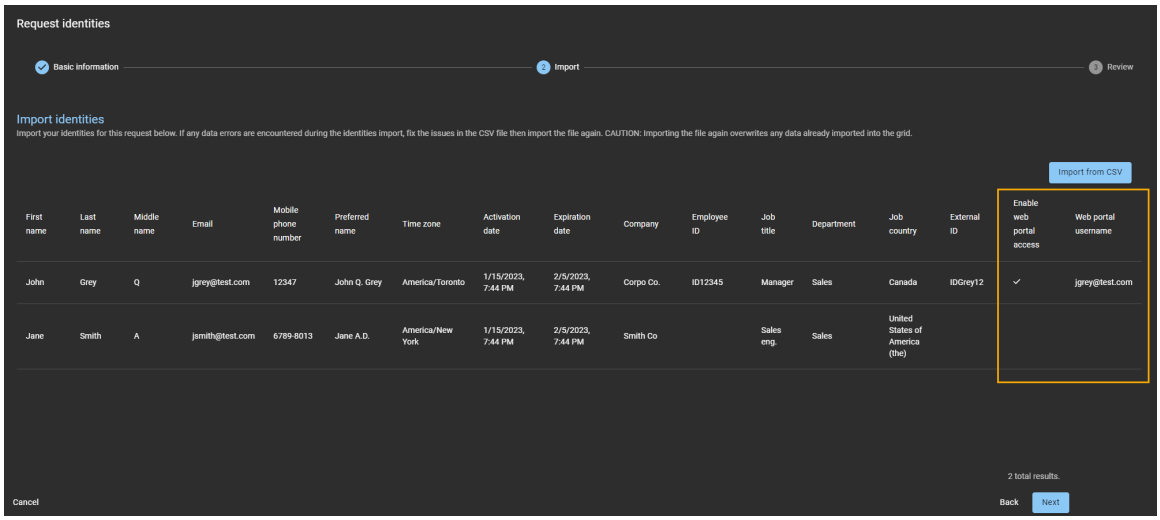
NOTE: When requesting multiple identities, the availability of the web portal access option depends on your template configuration.

- If your template does not include the web portal access option, the web portal access fields are ignored.
- If your template does include the web portal access option, the web portal access fields are processed.

The following example shows imported identities that do not include web portal access.



The following example shows imported identities that include web portal access.



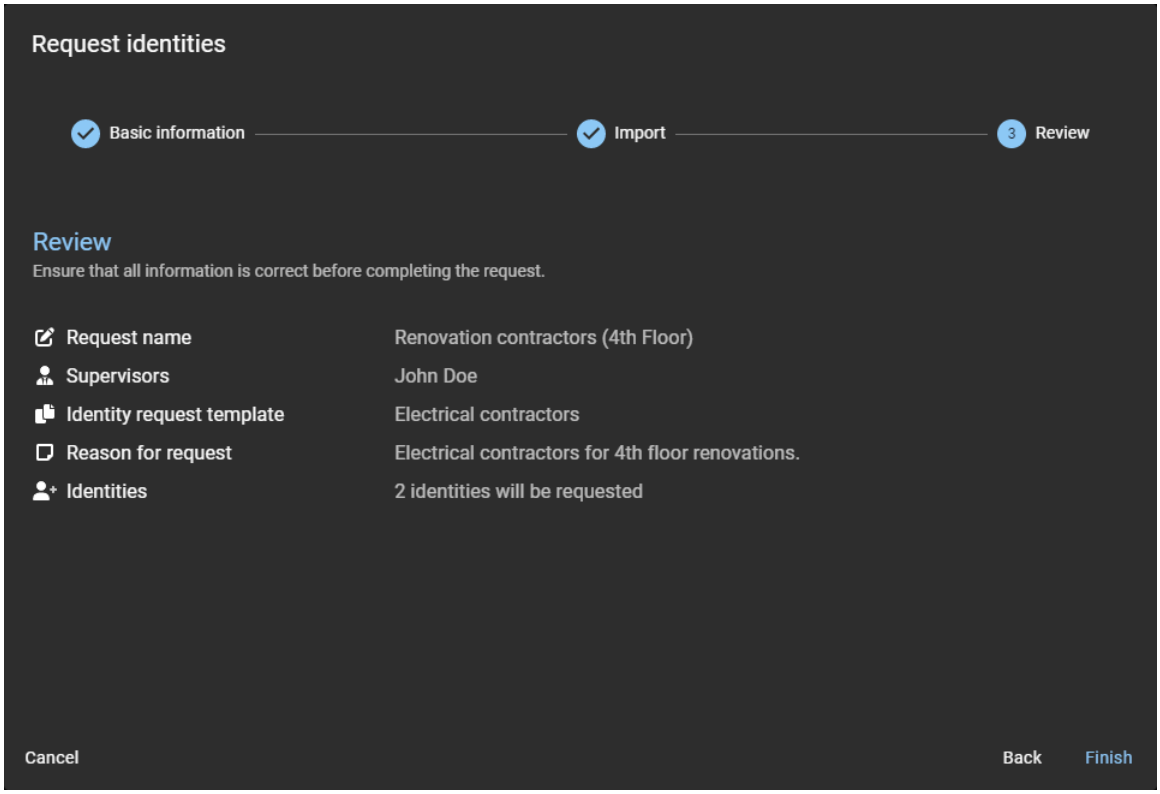
If any errors are encountered in the imported CSV file, they are highlighted in red. Any corrections must be applied in the CSV file and then imported again.

CAUTION: Correcting any errors will overwrite identities data already imported into the grid.

a) (Optional) If your identities list is long, consider using the **Show errors only** slider.

b) Click **Next**.

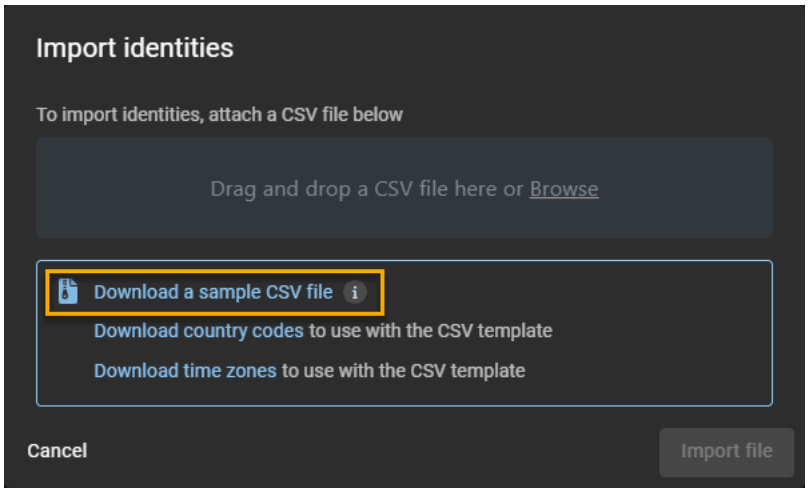
10 In the **Review** section, review the information to ensure that everything is correct.



a) If the details in the *Review* section are correct, click **Finish**.

11 If you chose **Download a sample CSV file**, do the following:

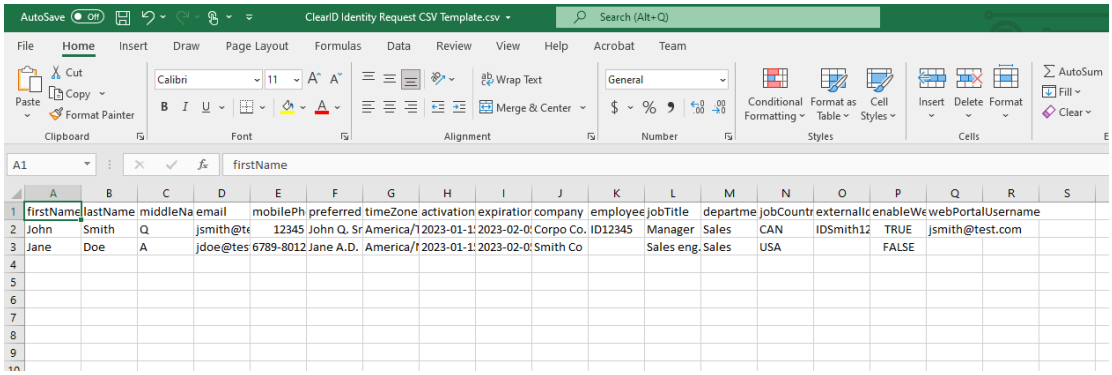
a) Click **Download a sample CSV file**.



b) Select and open the downloaded CSV file.

TIP: Download the *country codes* and *time zones* samples for reference if the *country codes* and *time zones* you require are not shown in the downloaded sample.

c) For each identity, complete a row of identity information in the CSV template file.

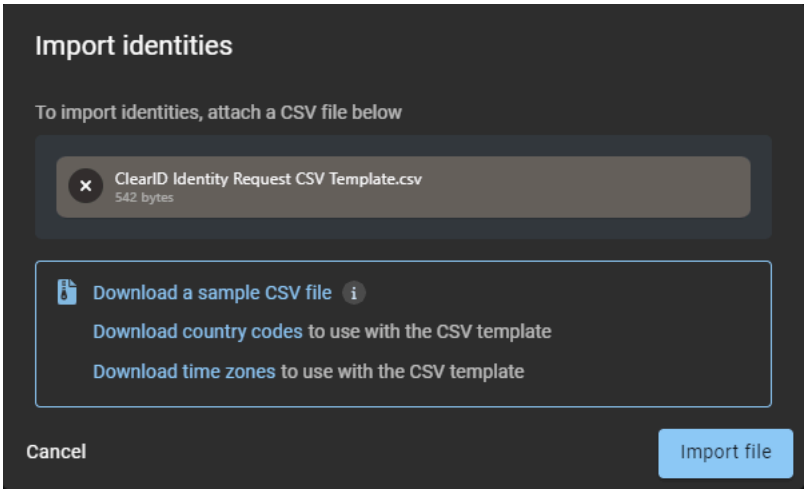


NOTE: The columns in the CSV template can vary depending on the settings in your site configuration.

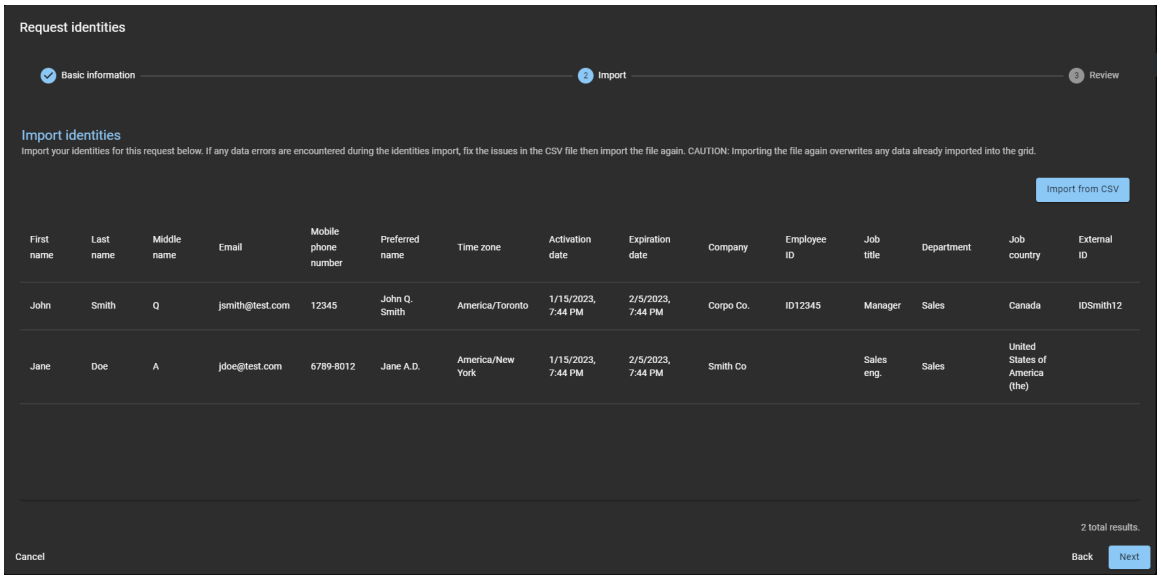
d) Save the identities list as a CSV file.

e) Return to the *Import identities* dialog, to drag and drop or click **Browse** to select the file you created.

f) Click **Import File** to import the identities list.



12 Review the imported identities data and check for any errors.



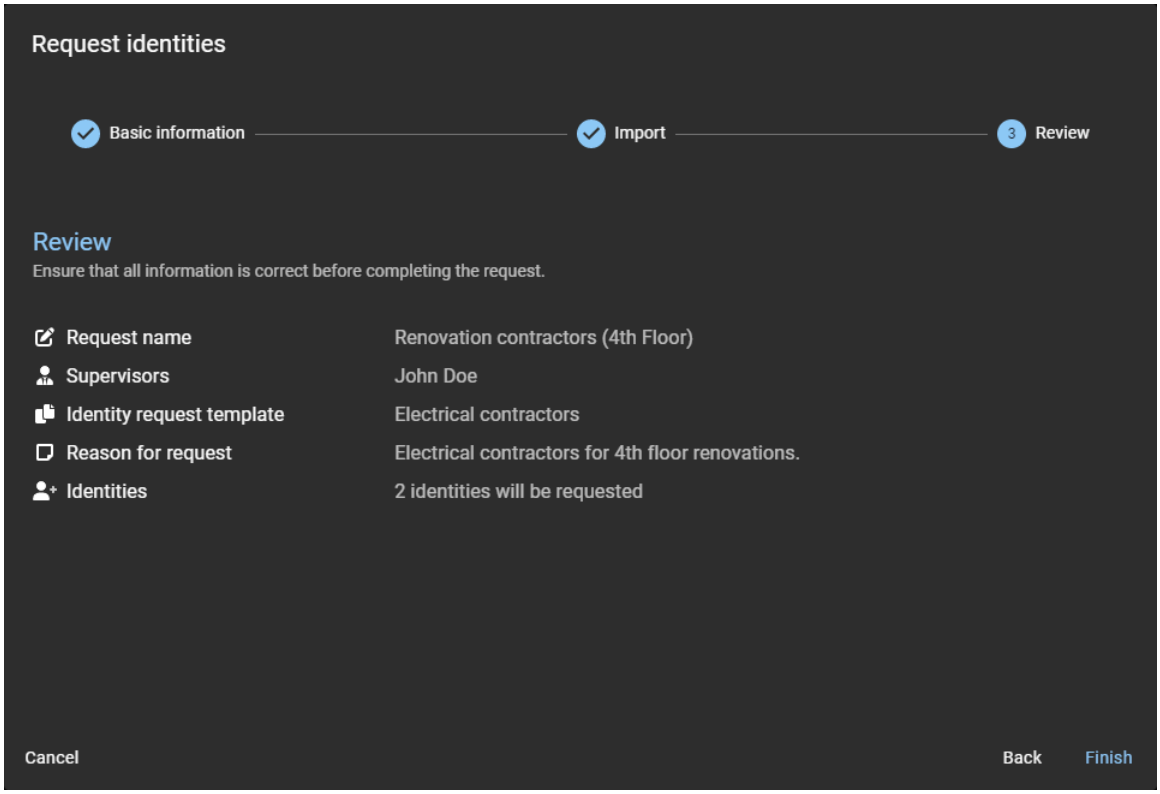
If any errors are encountered in the imported CSV file, they are highlighted in red. Any corrections must be applied in the CSV file and then imported again.

CAUTION: Correcting any errors will overwrite identities data already imported into the grid.

a) (Optional) If your identities list is long, consider using the **Show errors only** slider.

b) Click **Next**.

13 In the **Review** section, review the information to ensure that everything is correct.



a) If the details in the *Review* section are correct, click **Finish**.

Example

After you finish

Depending on the identity template that you selected, your identity requests are either approved automatically or approvers review identity requests and approve (or reject) as required.

Related Topics

Identity Request Feature Note (2 pages)

Canceling identity requests

To cancel identity requests, the identity requester must review the pending requests and then decide which requests to cancel.

Before you begin

Ensure that some identity requests have already been submitted.

What you should know

Only identity requesters can cancel identity requests.

- Only pending requests can be canceled.
- Completed requests cannot be canceled.

NOTE: If one of the requested identities is canceled, all the configured approvers are added to the **.cc** list in the email notification for identity request approval and completion titled: "Identity request for *identity* has been updated".

Procedure

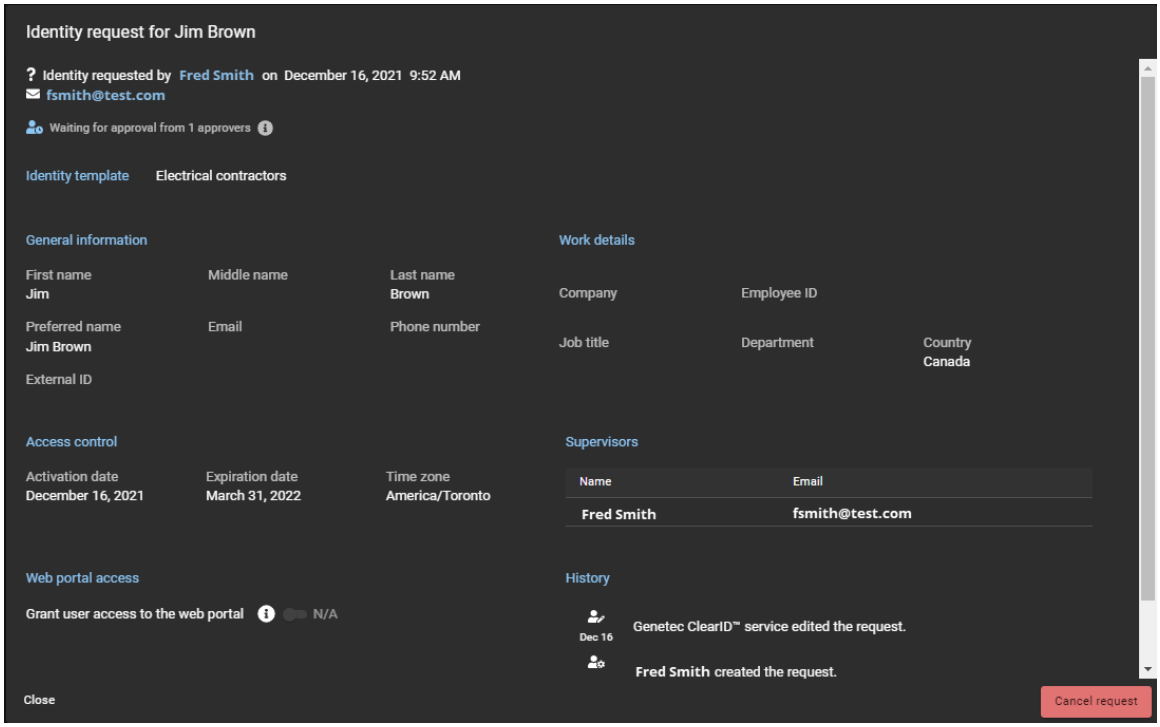
To cancel an identity request:

1 Click **Dashboard** > **My requests**.

2 From the **Status** list, filter the requests that are displayed:

- **Status:** Select a status from the following:
  - **All:** Displays all pending or completed tasks.
  - **Pending:** Displays tasks waiting for approval.
  - **Completed:** Displays completed tasks and their status. For example, approved, completed, denied, or canceled.

3 In the **My requests** list, click an identity request to display additional details about the request.



NOTE: The buttons that are available in the identity request details vary depending on whether you are the requester, supervisor, or an approver.

4 Review the identity request details for accuracy and completeness.

5 If the identity request is no longer required click **Cancel request**.

a) Enter the reason for cancellation and click **Confirm**.

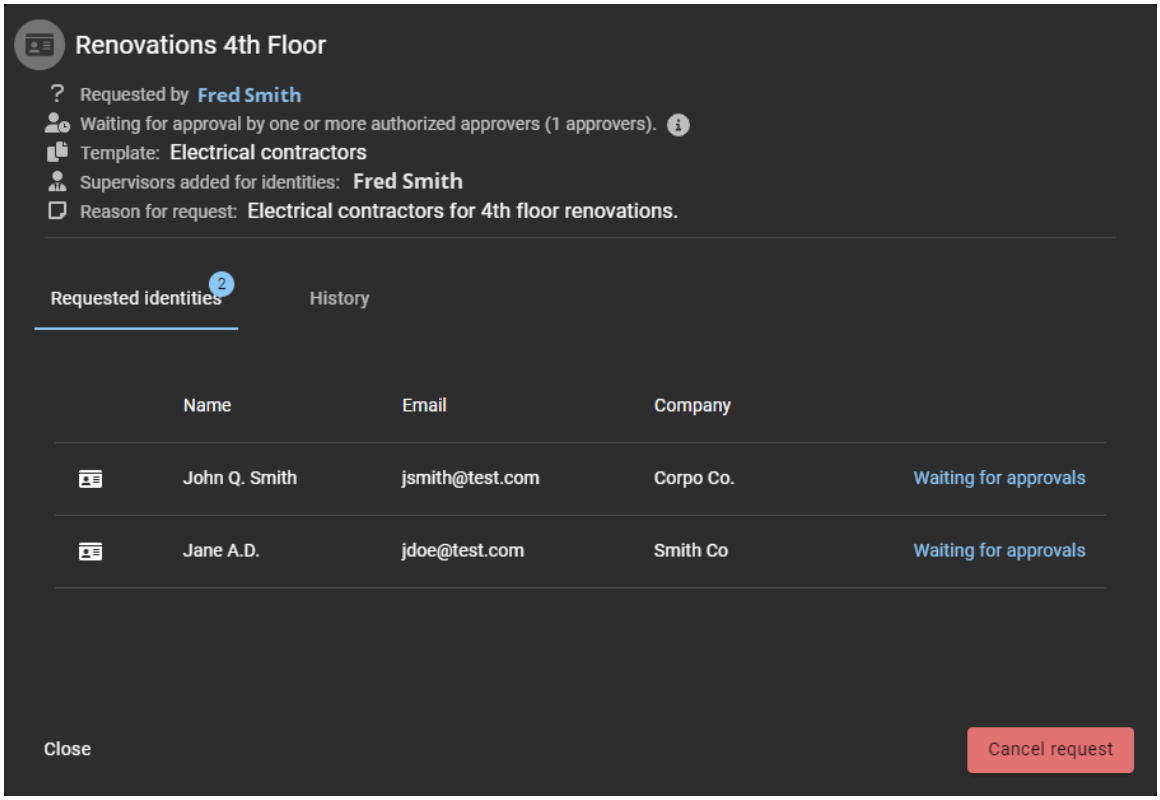
To cancel multiple identities requested using a CSV import:

1 Click **Dashboard** > **My requests**.

2 From the **Status** list, filter the requests that are displayed:

- **Status:** Select a status from the following:
  - **All:** Displays all pending or completed tasks.
  - **Pending:** Displays tasks waiting for approval.
  - **Completed:** Displays completed tasks and their status. For example, approved, completed, denied, or canceled.

3 In the **My requests** list, click an identities request awaiting approval to display additional details about the request.



NOTE: The buttons that are available in the identities request details vary depending on whether you are the requester, supervisor, or an approver.

4 Review the identity request details for accuracy and completeness.

5 If the identity request is no longer required click **Cancel request**.

a) Enter the reason for cancellation and click **Confirm**.

The identity request is now canceled.

Approving identity requests

To approve identity requests, a supervisor or identity approver must review the pending approvals and then decide which requests to approve.

Before you begin

Ensure that some identity requests have already been submitted.

What you should know

Only supervisors or identity approvers can approve identity requests.

Procedure

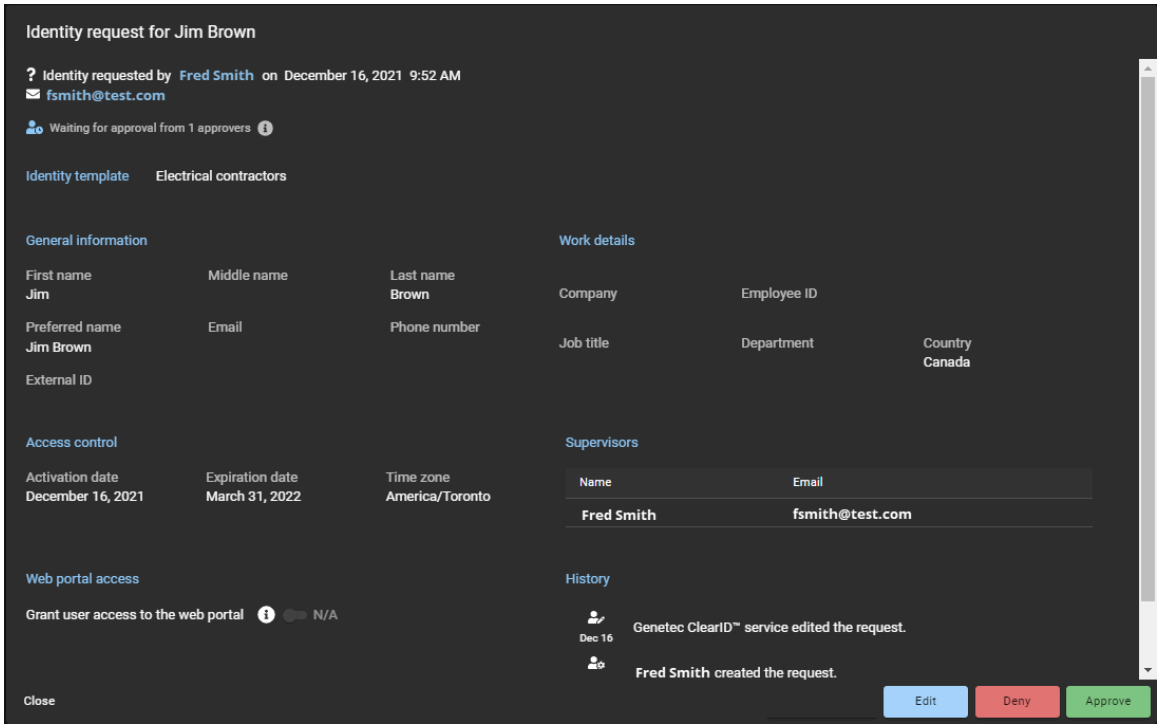
To approve an identity request:

1 Click **Dashboard** > **My tasks**.

2 From the **Status** list, filter the tasks that are displayed:

- **Status:** Select a status from the following:
  - **All:** Displays all pending or completed tasks.
  - **Pending:** Displays tasks waiting for approval.
  - **Completed:** Displays completed tasks and their status. For example, approved, completed, denied, or canceled.

3 In the **My tasks** list, click an identity request to display additional details about the request.



NOTE: The buttons that are available in the identity request details vary depending on whether you are the requester, supervisor, or an approver.

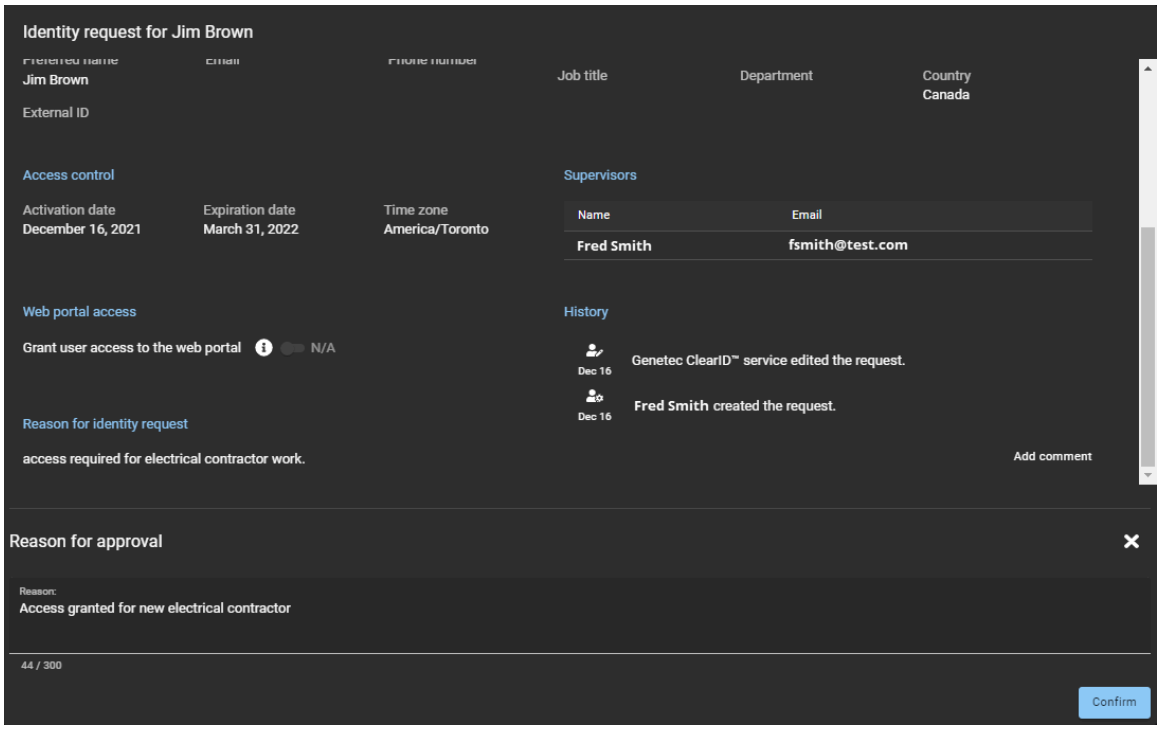
4 Review the identity request details for accuracy and completeness.

5 (Optional) If you need to modify the identity request, click **Edit** and make any changes that are required.
   a) Click **Save**.

6 If the request is not valid or contains incorrect information, click **Deny**.
   a) Enter the reason for denial and click **Confirm**.

7 If the request is valid and correct, click **Approve**.

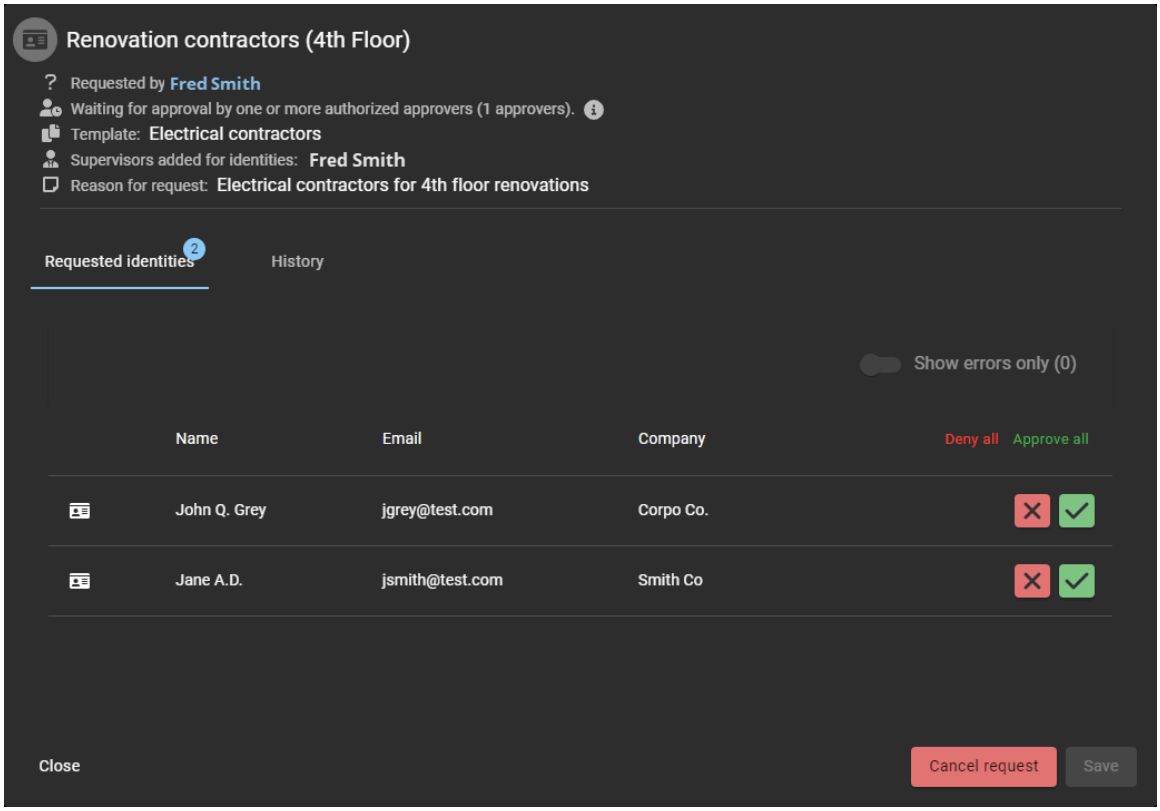
8 In the **Reason for approval** field, enter the reason for approval and click **Confirm**.



To approve identities imported using a CSV import:

1 Click **Dashboard** > **My tasks**.

2 In the **My tasks** list, click an identities request to display additional details about the request.



NOTE: The buttons that are available in the identity request details vary depending on whether you are the requester, supervisor, or an approver.

3 Review the identities request details for accuracy and completeness.
   a) If all the identities in the request are correct, click **Approve all** then click **Save**.
   b) If all the identities in the request are not correct, click **Deny all** then click **Save**.

4 (Optional) If you need to modify an identity, click **View identity request details** ( ) on the row for the identity to review the details of that request.
   a) Click **Edit** to make any changes that you require.
   b) Click **Save**.

5 If the request is not valid or contains incorrect information, click **Deny** ( ) on the row for the identity.
   a) Enter the reason for denial and click **Confirm**.

6 If the request is valid and correct, click **Approve** ( ) on the row for the identity.
   a) Click **Save**.
   b) In the **Reason for approval** field, enter the reason for approval and click **Confirm**.

The identity request is now approved. The identity is now created and if applicable inherit the role access to associated areas during the periods specified in their identity request.

NOTE: (Optional) Additional communications might also be provided by your organization regarding where and how to retrieve a badge access card (if required) for the new identity.

Example

After you finish

Related Topics

Identity Request Feature Note (2 pages)

Modifying an identity request

To modify identity requests, a supervisor or identity approver must review the pending approvals and then decide which requests to modify.

Before you begin

Ensure that some identity requests have already been submitted.

What you should know

Only supervisors or identity approvers can modify identity requests.

Procedure

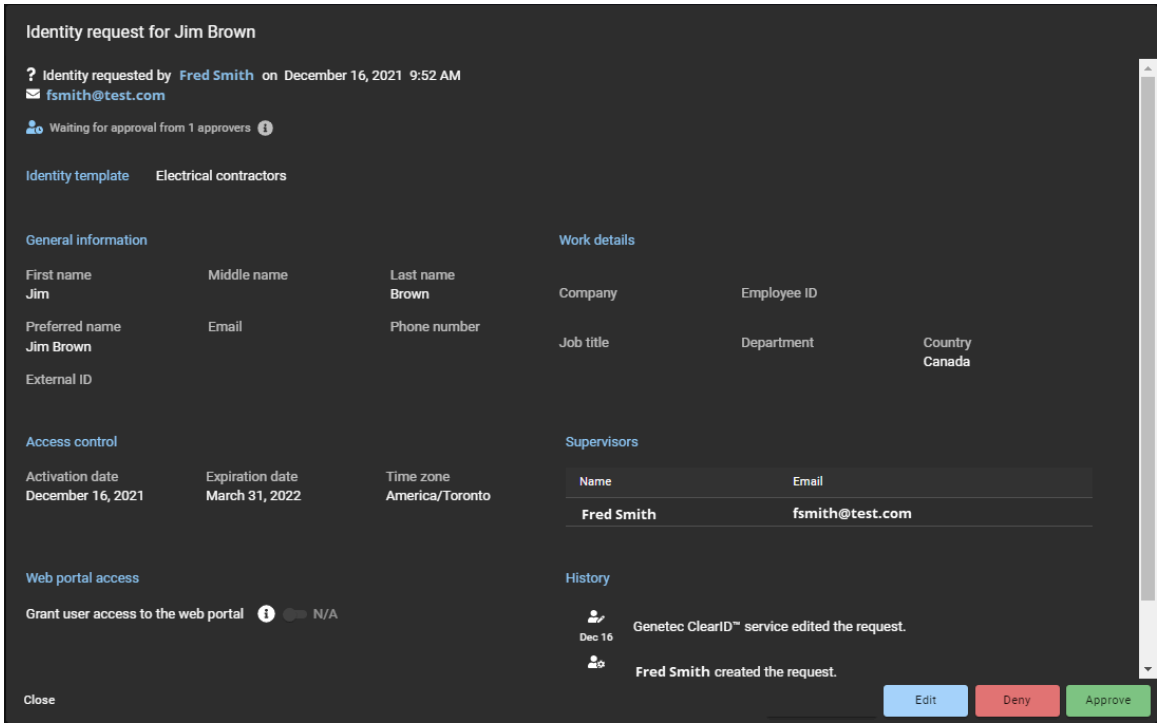
To modify an identity request:

1 Click **Dashboard** > **My tasks**.

2 From the **Status** list, filter the tasks that are displayed:

- **Status:** Select a status from the following:
  - **All:** Displays all pending or completed tasks.
  - **Pending:** Displays tasks waiting for approval.
  - **Completed:** Displays completed tasks and their status. For example, approved, completed, denied, or canceled.

3 In the **My tasks** list, click an identity request awaiting approval to display additional details about the request.



4 Review the identity request details for accuracy and completeness.

5 To modify the identity request, click **Edit** and make any changes that are required.

a) Click **Save**.

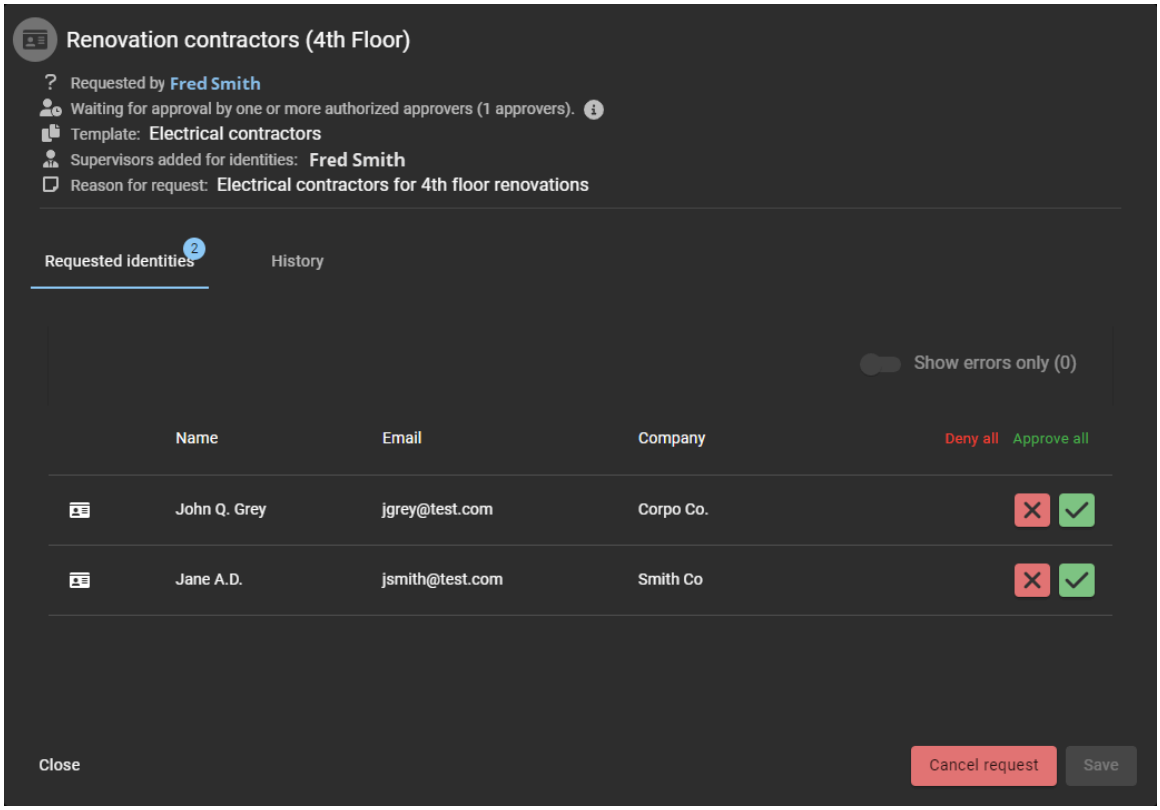
To modify multiple identities requested using a CSV import:

1 Click **Dashboard** > **My tasks**.

2 From the **Status** list, filter the tasks that are displayed:

- **Status:** Select a status from the following:
  - **All:** Displays all pending or completed tasks.
  - **Pending:** Displays tasks waiting for approval.
  - **Completed:** Displays completed tasks and their status. For example, approved, completed, denied, or canceled.

3 In the **My tasks** list, click an identities request awaiting approval to display additional details about the request.



4 (Optional) If you need to modify an identity, click **View identity request details** ( ) on the row for the identity to review the details of that request.

a) Review the identity request details for accuracy and completeness.

b) Click **Edit** to make any changes that you require.

c) Click **Save**.

After you finish

Approve your identity requests.

About identity requests report

In Genetec ClearID™, an identity requests report is a list of identity requests for your ClearID account. The report includes information about the identity request date, requester, name, identity template, status, and reviewers.

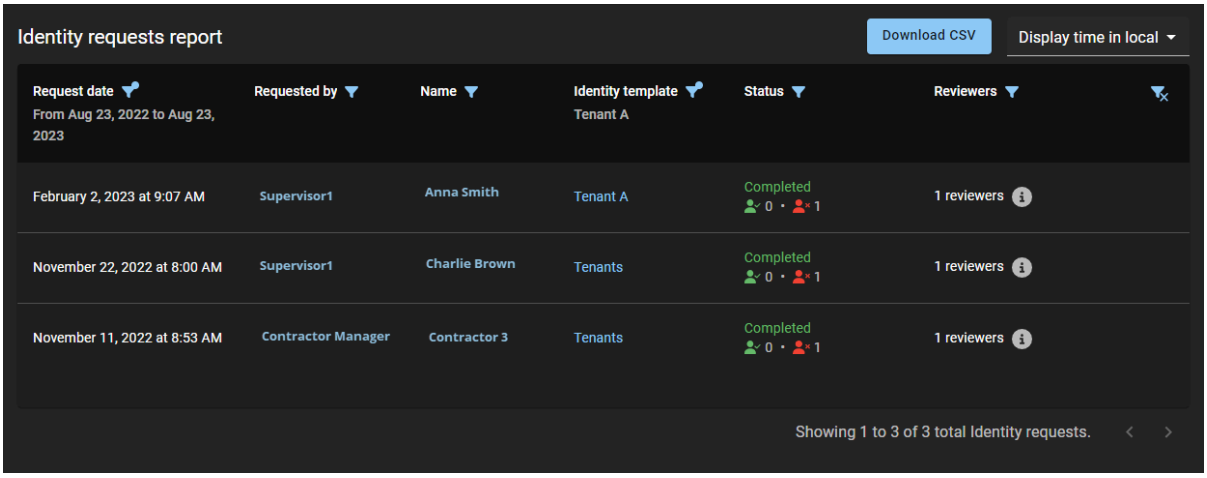


Figure 2: Identity requests report

The identity requests report is used by administrators to check the status of all identity requests at the account level. The report can also be used to provide identity requests information to auditors.

Filters can be used to help refine the search results by identity request date, requested by, name, identity template, status, and reviewers.

Related Topics

Checking the status of identity requests on page 233

Checking the status of identity requests

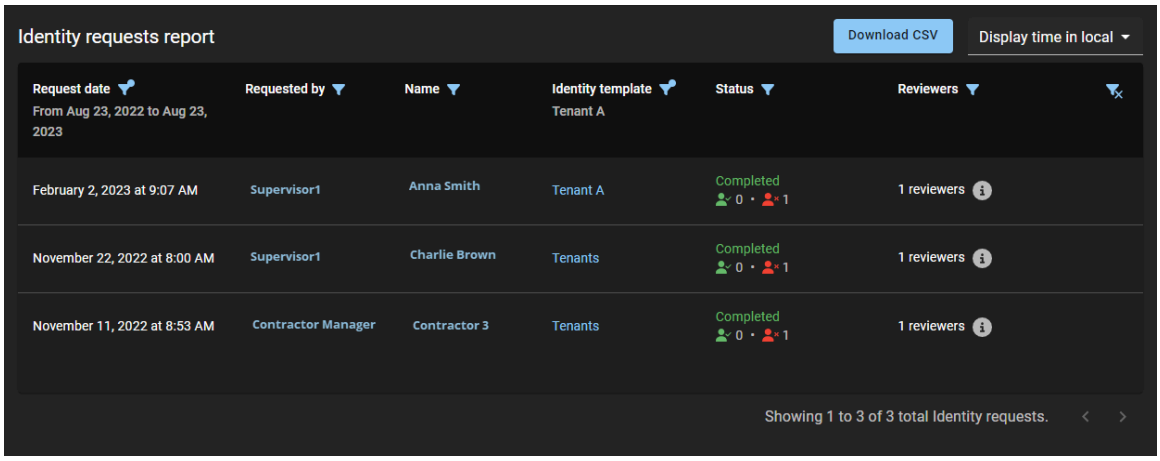
As an *Account administrator* you can check the status of identity requests to ensure that the organization is security-compliant, audit ready, and that the requests are processed in a timely fashion.

Before you begin

You must be an *Account administrator* to view the **Identity requests report** and check the status or progress of identity requests.

Procedure

1 From the homepage, click **Reports** > **Identity requests**.



2 In the *Identity requests report* page, select the required display time format.

- **Display time in local:** Report times are displayed using the system time from the computer of the logged-in user.
- **Display time in UTC:** Report times are displayed using Coordinated Universal Time (UTC).

3 Filter the report based on your required criteria:

- **Request date:** In the **Request date** column, click to filter the results by date.

  If you selected **Date range**, use the calendar picker to select the date range that you require.

  NOTE: The **Request date** time period is limited to a maximum of 1 year.
- **Requested by:** In the **Requested by** column, click to filter the results by identity requester.
  - Enter a user name or email address in the search field.
  - (Optional) Click the **Requested by** hyperlink to display summary details about the requester.
- **Name:** In the **Name** column, click to enter a search string and filter the results by **Any words** or **All words**.
  - **(Optional):** Click the **Name** hyperlink to display the identity request.

  NOTE: If you're an approver, you can **Approve** or **Deny** the pending identity request while viewing the request.
- **Identity template:** In the **Identity template** column, click to filter the results by identity template type.
- **Status:** In the **Status** column, click to filter the results by status.

- Select one or more **check boxes** to filter the results by the statuses that you require (Submitted, Waiting for approvals, Denied, Approved, Canceled, or Completed).

- **Reviewers:** In the **Reviewers** column, click to filter the results by identity, role, or both.
- **(Optional):** Click  to reset filter selections.

4 Click **Download CSV**, to download a copy of the identity requests report in CSV format. The report can then be used for auditing purposes, to keep a physical copy, to attach to an audit request, to review offline, or to manipulate or consolidate data in a spreadsheet for other audiences.

a) Follow your browser prompts to complete downloading the exported file.

The file is exported as a *.CSV* file to the default download location for your browser.
By default the exported file is created using the name of your site. For example, *IdentityRequestReport_fromdate*_to_*todate*_SiteActivityReport.csv (*IdentityRequestReport_2024-09-24.csv*).

NOTE: The columns and entries in the CSV file can vary depending on the filters you've selected when you download the report.

After you finish

Approve or reject identity requests as required:

- Approving identity requests on page 226

Related Topics

About identity requests report on page 232
Requesting identities on page 209

6

Credential synchronization

This section includes the following topics:

Configuring credential replication

To replicate supported credentials across multiple Synergis™ systems, you must configure your credentials replication settings in the Genetec ClearID™ portal.

Before you begin

- Learn about cardholder and identity relationships.
- Make sure that ClearID is managing your cardholder and credential changes.

What you should know

Only an account administrator can configure credentials replication.

Credentials replication is intended to replicate *credentials* across two or more Synergis systems. For the replication functions to work, you must be using all the identity management functions provided by ClearID. Any credential changes that are only performed on a secondary system aren't replicated to the other systems.

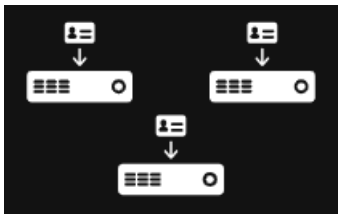
NOTE: Credentials won't be sent to systems where cardholder and credential management is in read-only mode. In this situation, the access control system is highlighted in the ACS list with the **Cardholder and credential management is disabled** ( ) icon.

Procedure

1 From the homepage, click **Administration** > **Credentials**.

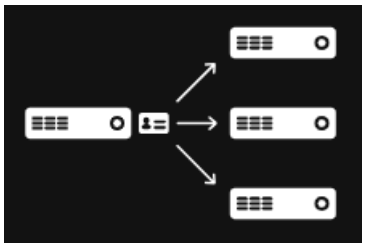
2 In the *Credential replication mode* section, from the **Mode** list select a replication mode.

a) Option 1: **No replication between access control systems**.



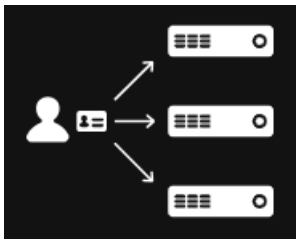
Each access control system operates independently, without synchronizing credentials with other systems. The credentials created in one system remain unique to that system, and aren't automatically synchronized or used in other systems.

b) Option 2: **Use a specific access control system as the source of credentials synchronization**.



Credential modifications performed in the selected access control system are synchronized to all other systems where the identity is associated with a cardholder.

c) Option 3: **Use the system associated with the primary site of the identity as the source of credentials synchronization**.



Credential modifications performed in the system associated with the primary site of the identity are replicated to all other systems where the identity is associated with a cardholder.

NOTE: If you selected **No replication between access control systems**, you can skip the following step.

3 In the *Credential types and formats* section, select the credential types that you want to synchronize.

NOTE: The credential options that are available for selection here varies depending on the credential information that is pulled in from your connected systems. Custom credentials are not supported.

a) (Optional) If your organization has multiple formats, there might be situations where you only want to synchronize specific formats.

4 Click **Save**.

After you finish

(Optional) Do one or more of the following:

- Review the credential synchronization logs.
- Force a credentials synchronization.

Viewing credential synchronization logs

To check credential synchronization status or to review detailed information about the audit trail activities for all events related to credentials, view the credential synchronization logs in Genetec ClearID™.

Before you begin

Configure your credentials synchronization settings.

What you should know

Only an account administrator can view the credential synchronization logs.

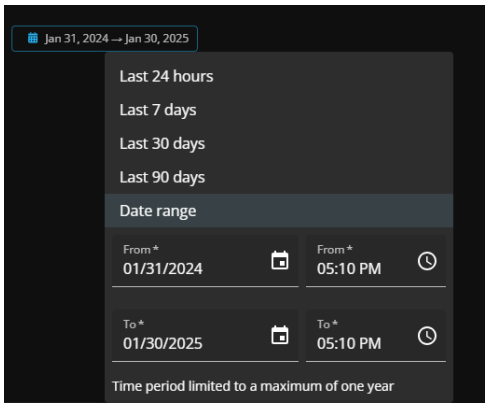
Procedure

1 From the homepage, click **Administration** > **Credentials**.

2 In the *Credential replication logs* section, click **View logs**.

3 (Optional) Use filters to help refine the log results based on one or more of the following criteria:

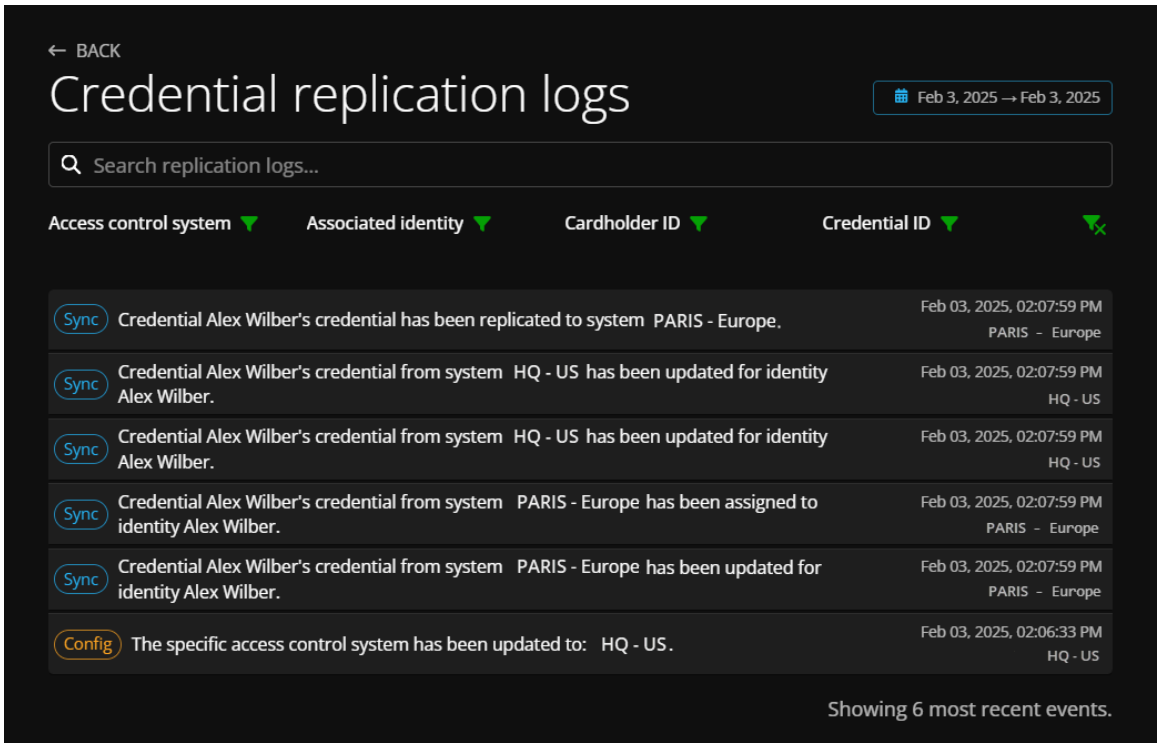
- **Date range:** Select a pre-defined date range from the choices available or enter a specific date range using the date range picker.



- **Search field:** In the search field, enter a search criteria.
- **Filter controls:**
  - **Access control system:** Search for an ACS system using its name or select one or more ACS systems from the list.
  - **Associated identity:** Search for an associated identity. For example, first name, last name, email, or a partial search string.
  - **Cardholder ID:** Only unique cardholder IDs in alpha-numeric HEX value format are accepted in this input field. For example, 29abdafb-f124-401a-b143-3c88556ec3c1.

NOTE: This filter is useful for users who primarily work with the information from Security Center.

- **Credential ID:** Only unique credential IDs in alpha-numeric HEX value format are accepted in this input field. For example, `fc6e4851-f429-40e5-bbe7-ba363c5cad1a`.



After you finish

(Optional) Force a credentials synchronization.

Forcing credential synchronization

To resolve credential issues, you can force a synchronization to replace all credentials in Genetec ClearID. This force synchronization uses the latest values from your selected credential source and triggers the synchronization immediately.

Before you begin

- Configure your credential synchronization settings.
- (Optional) View the credential synchronization logs.

What you should know

Only an account administrator can force a credentials synchronization.

After credential synchronization settings have been configured, the synchronization is automatic.

- A forced synchronization can be used during initial setup as a preemptive measure to ensure that all credentials are propagated correctly.
- A forced synchronization is also used when the synchronization mode is updated from a specific system to the primary site option. Forcing the synchronization after a mode change ensures that the correct credentials are synchronized immediately to align with the selected mode.

Synchronization throughput is estimated at approximately 10 credentials a second. However, this throughput can vary depending on the machine running the Genetec ClearID™ plugin and the number of credentials assigned to identities.

If credential issues are encountered at a site contact the account administrator to view the logs, perform troubleshooting, and potentially force a synchronization.

NOTE: If you selected **No replication between access control systems** during your credentials synchronization configuration, the force synchronization function isn't available.

Procedure

1 From the homepage, click **Administration** > **Credentials**.

2 In the *Force credential synchronization* section, click **Synchronize**.

3 In the *Synchronize* dialog, click **Synchronize**.

The request to synchronize credentials is initiated and a Request to synchronize other systems sent successfully message is displayed.

IMPORTANT: No further progress is reported in the **Credentials** tab.

After you finish

Review the **Credential replication logs** to confirm that credentials information has been updated with the latest information.

7

Managing sites

Learn how to manage sites.

This section includes the following topics:

About sites

In Genetec ClearID™, a site is a logical entity. Sites include one or more areas. Each site and area can have a different owner.

A site typically represents either a building or a campus:

- If you have multiple buildings managed by one security team or one set of policies for visitors, consider setting them up using one site.
- Each site can have its own set of policies and site owners.
- If you have different buildings spread throughout a city, consider implementing one site per building.
- Multiple sites can be associated with the same Security Center access control system.

IMPORTANT: Your implementation choices can affect the Genetec ClearID™ solution costs. These costs can vary depending on the implemented functions, the number of identities, and the number of sites.

Creating sites

Before you can configure your areas in Genetec ClearID™, you must create the sites that you want to associate your areas with.

Before you begin

- Add your systems.

What you should know

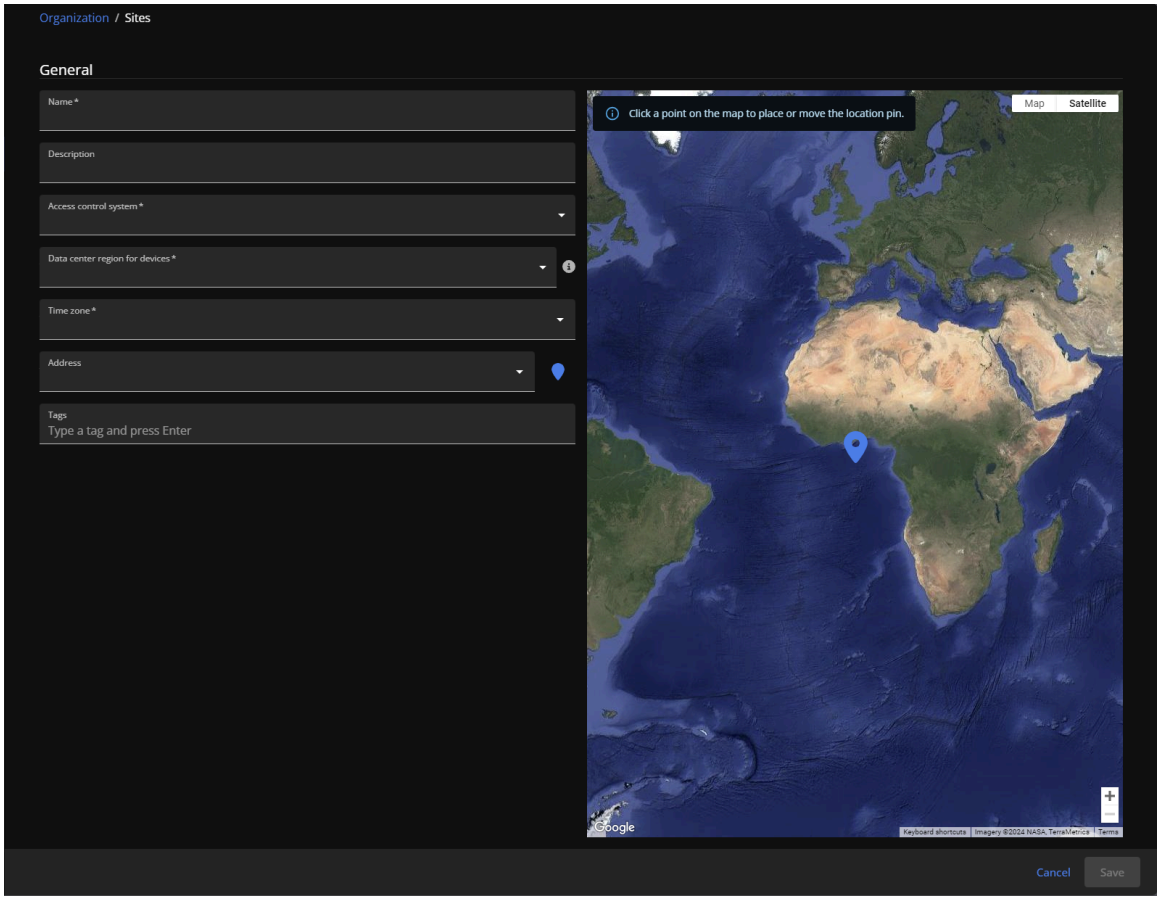
To create sites in ClearID, you must be an *Account administrator*.

- An *Account administrator* can choose the *Site owners* and configure visitor management for the site.
- A *site* is associated with a Security Center access control system.
- Multiple sites can be associated with the same Security Center access control system.

Procedure

1 Click **Organization** > **Sites**.

2 Click **Add site**.



3 On the *General* page, complete the fields.

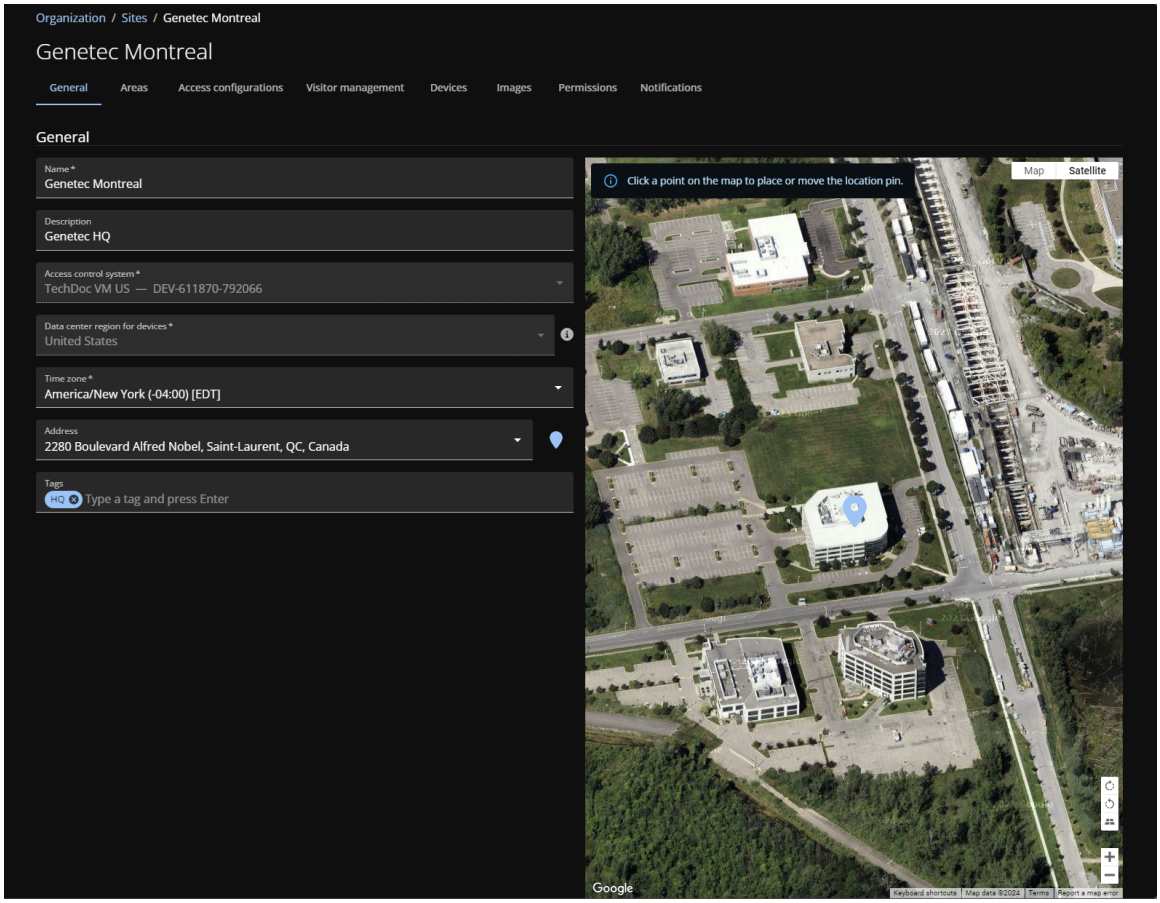
NOTE: Mandatory fields are highlighted in the user interface with an asterisk (*).

- **Name:** Enter a name for your site.
- **Description:** Enter a description that indicates the geographical location of the building or physical location of the site.
- **Access control system:** Select the system that you require from the **Access control system** list.

  NOTE: This access control system is used to synchronize changes in ClearID back to Security Center.
- **Data center region for devices:** Select a data center region from the drop-down. This option is typically set to the data center region closest to where the device will be used. The data center region is used for device communications.

  NOTE: This setting is permanent and can't be changed after the site is created. The data center option isn't available if your account is deployed in the Europe only architecture.
- **Time zone:** Select a time zone from the drop-down. The time zone options are represented using the Internet Assigned Numbers Authority (IANA) format.

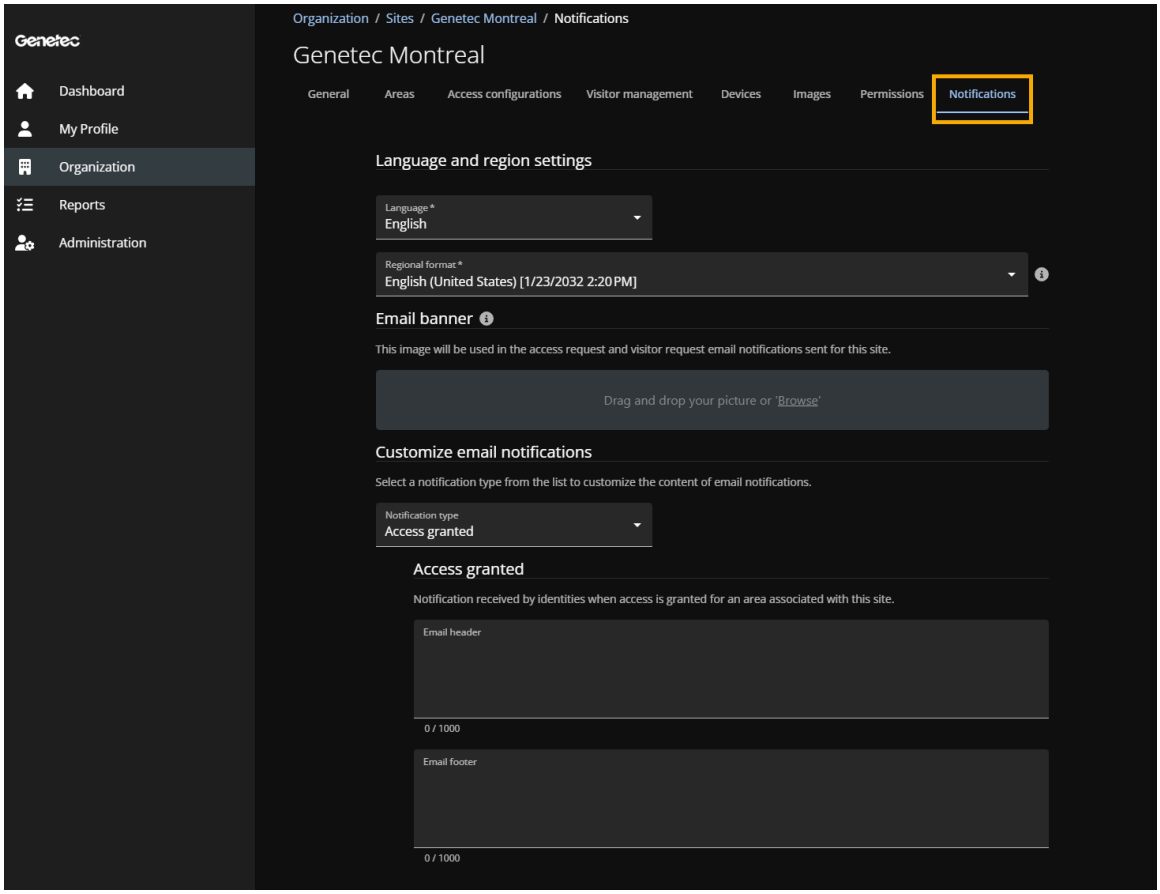
  NOTE: When an access request or visitor request is made from anywhere in the world, the time zone of the requested site access or visit is used to ensure that the correct date and times are applied to the request.
- **Address:** Enter an address for the site. As you type, Google Maps integration auto-complete processes the information and displays available addresses.
  - **Center map:** Click to find the address on the map, and center the map on that address.
- **Tags:** Enter alternative keywords or search term categorizations that might be used to find the site.



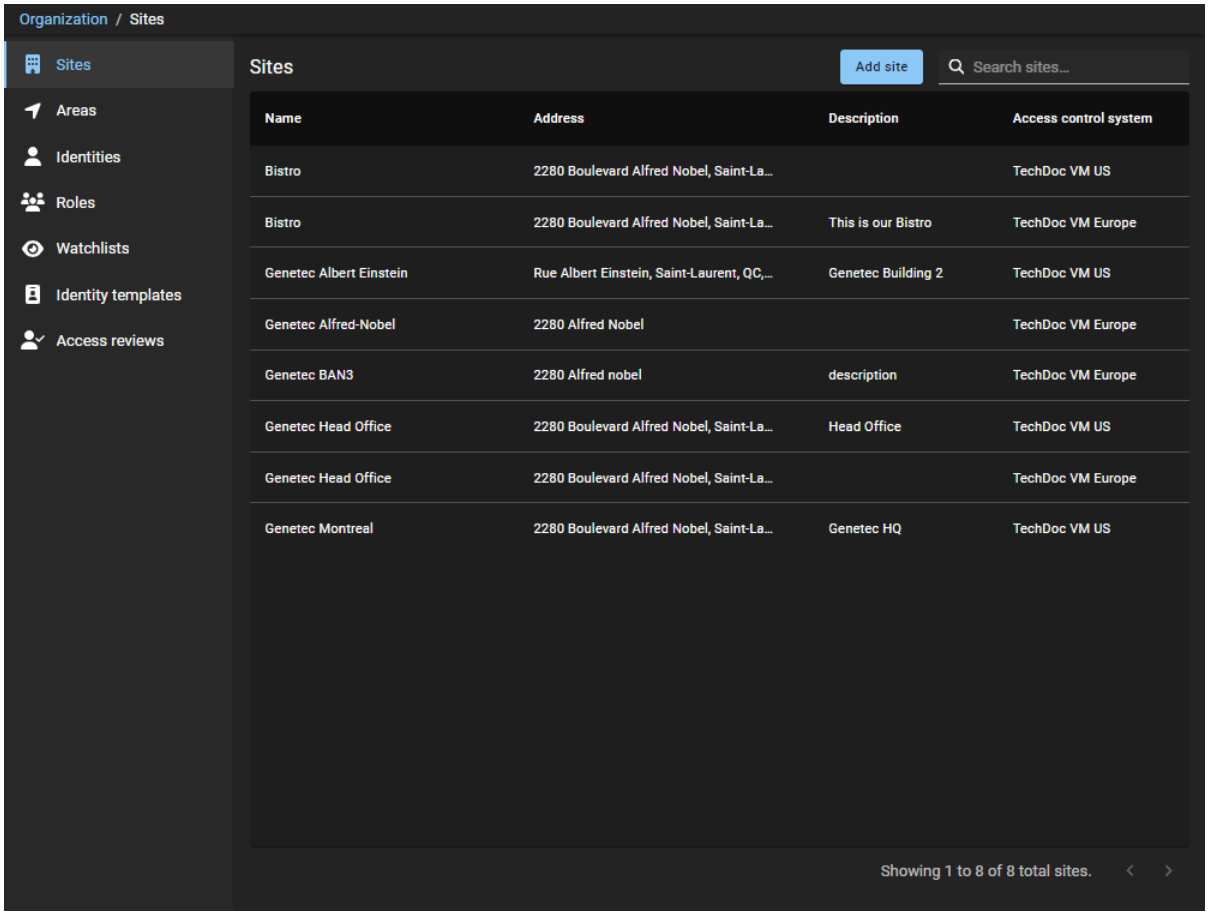
4 On the *Notifications* page, complete the fields.

- **Language:** Select a notification language from the drop-down. This setting is used for email notifications and SMS alerts. The notifications language selection is unique to a site and you can choose from English, French, Spanish, Portuguese, Italian, German, Dutch, and Japanese.
- **Regional format:** Select a regional date and time format to use in email notifications for this site. The default regional format is American English (en-us). For example, 1/23/2032 2:20 PM.

5 Click **Save**.



Your site has been created in ClearID.



After you finish

Add your site owners.

Related Topics

Modifying sites on page 263
IANA Time Zone Database

Adding site owners

In Genetec ClearID™, a site owner is an identity that has authority over areas associated with a specific site. Before you can assign or modify area owners, configure specific area settings that are exclusive to site owners, or manage site access reviews you must add your site owners.

Before you begin

Create your sites.

What you should know

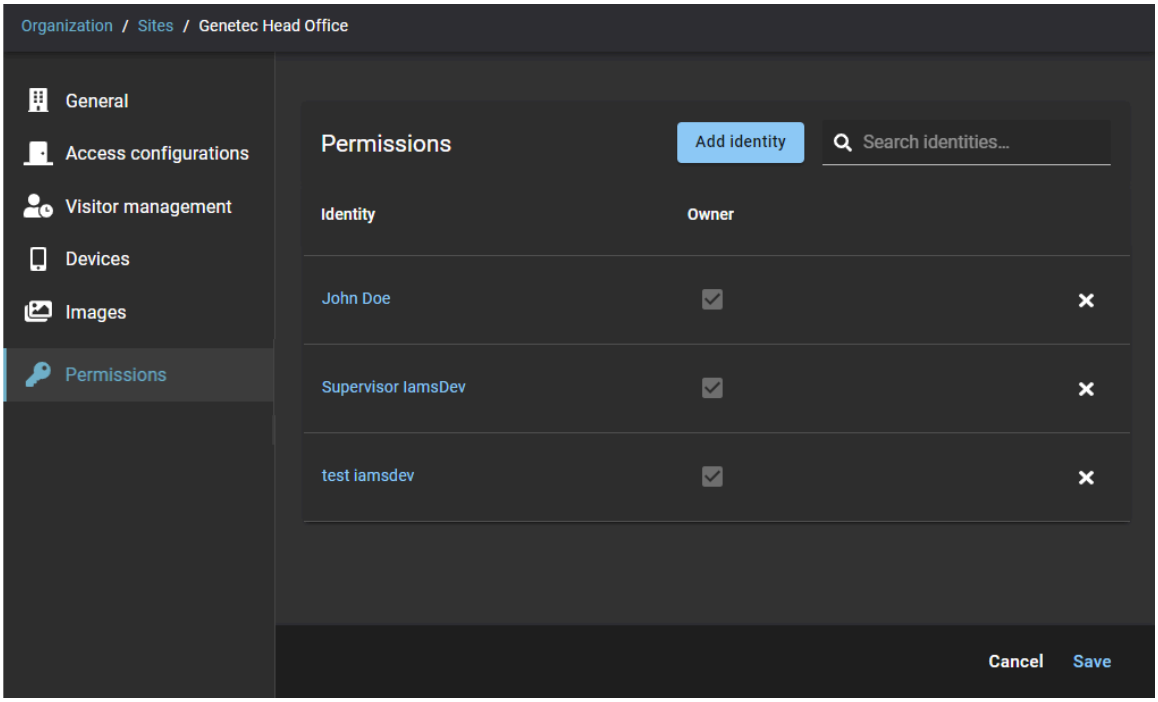
To add site owners in ClearID, you must be an account administrator.

Procedure

1 Click **Organization** > **Sites**.

2 Select your site and click **Permissions**.

3 Click **Add identity** to add site owners to the site **Permissions** list.



a) Search for or select the identities that you require and click **Add**.

TIP: Click the identity hyperlink in the **Identity** column to review identity details (company, department, home site, supervisor, and email) and to verify that you have the correct identities in the list.

b) (Optional) Click ✕ to remove any site owner permissions that are no longer required.

4 Click **Save**.

After you finish

Create your areas

Enabling visitor management for sites

Before users can invite visitors, you must configure the visitor management settings for your site.

Before you begin

Create your sites.

What you should know

- Visitor management is disabled by default.
- Only account administrators or *site owners* can enable or configure visitor management for sites in Genetec ClearID™.
- The options displayed when a visit request is created vary depending on the users requesting access and also the settings that you configure here.
- Only account administrators can grant user permissions to invite visitors using roles.

- Users are automatically granted *Invite visitors* permissions for their home site by default.

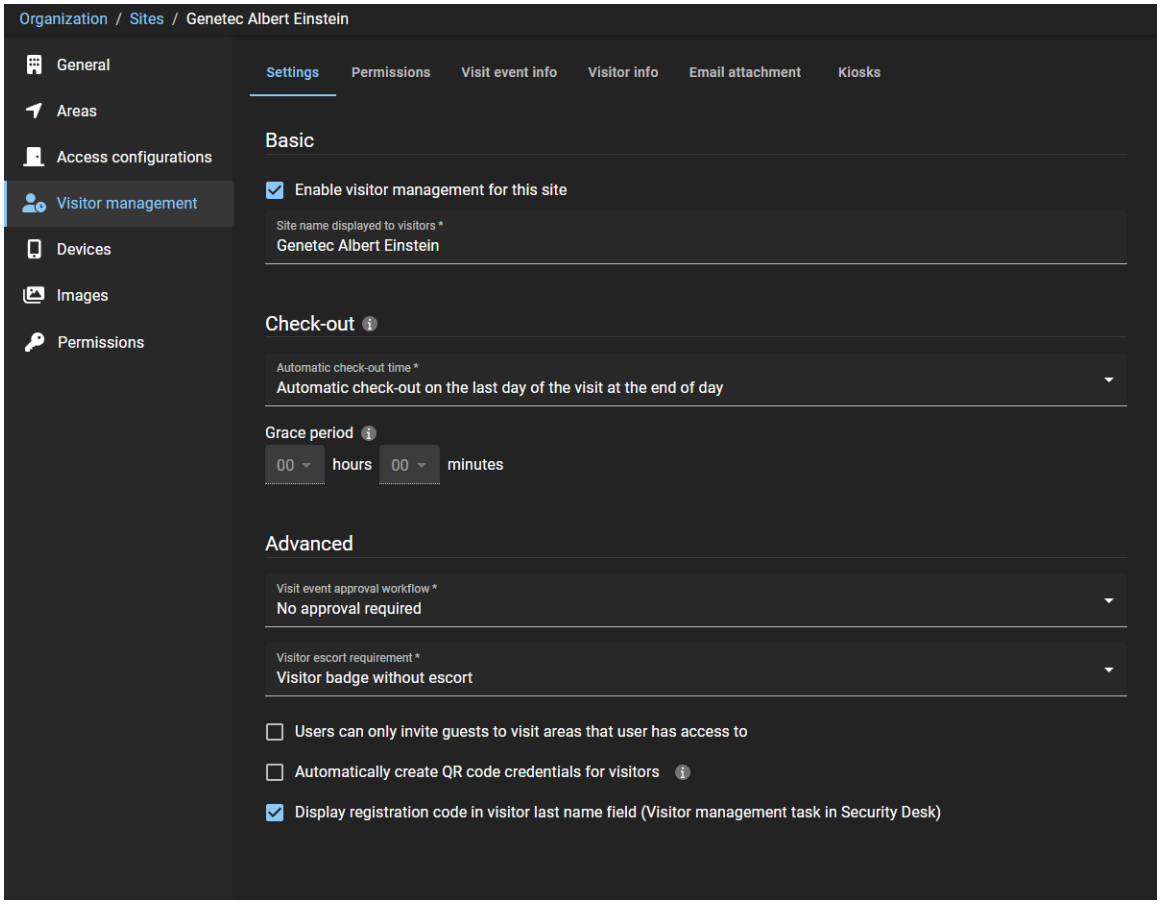
Procedure

1 Click **Organization** > **Sites**.

2 Search for and select a site.

3 Click **Visitor management** to configure the visitor management options for a site.

4 Click the **Settings** tab.



a) In the *Basic* section, configure the options you require:

- **Enable visitor management for this site:** Select this checkbox to enable visitor management for this site.
- **Site name displayed to visitors:** Enter the site name that you want displayed externally to visitors.

b) In the *Check-out* section, configure the options you require:

- **Automatic check-out time:**
  - **Automatic check-out on the last day of the visit at the end of the day:** The visitor is checked out automatically on the last day of the visit at midnight.
  - **Automatic check-out at the scheduled visit end time:** The visitor is checked out at the specified visit end time.

NOTE: Visitor's temporary access rights and QR code credential are deactivated during automatic check-out. If a grace period is activated, visitors are checked out after the additional grace period lapses after the visit end time.

- **Grace period:** Adds extra time to the scheduled end time of the visit event. After the grace period lapses, the visitor is checked out.

c) (Optional) In the *Advanced* section, configure the options you require:

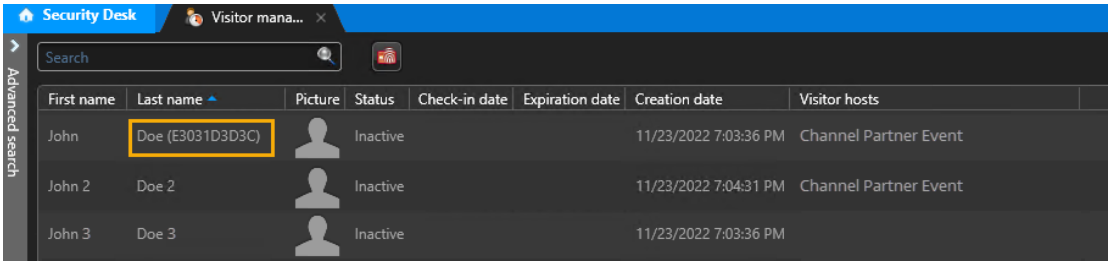
- **Visit event approval workflow:** Select the approval workflow that you require:
  - **No approval required:** No approval is required to complete visit event approval. For example, to simplify employees inviting visitors at any time.
  - **Supervisor approval required:** Supervisor approval is required to complete visit event approval.
  - **Visit event approver approval required:** Visit event approver approval is required to complete visit event approval.

    NOTE: If an area is selected during the visit event creation, it can trigger its own approval workflow.
- **Visit escort requirement:** Select the badge type that you require:
  - **Visitor badge without escort:** Typically used for visitors who do not require an escort and who do not need door access to secure or sensitive areas.
  - **Visitor badge with escort:** Typically used for visitors who do require an escort or who need door access to secure or sensitive areas.

    NOTE: The **visitor escort rule** must also be turned on for the areas in Synergis™ to enforce the visitor escort rule. For the escort function to work properly, the **Cardholder groups can escort visitors** option must also be enabled in the **General settings** of the *Access control* task in Config Tool.
- **Users can only invite guests to visit areas that they have access to:**
  - If the checkbox is selected, users can only invite guests to visit areas that the requesting user has access to. This setting is enforced when a guest visit request is created.
  - If the checkbox is cleared, users can invite guests to visit any area in ClearID that allows visitors.
- **Automatically create QR code credentials for visitors:** If the checkbox is selected, ClearID automatically creates a QR code credential for visitors when a visit request is created. Visitors can then use the QR code contained in the visitor confirmation email to access specific parking entrances, turnstiles, or gated facilities. The QR code can also be used during check-in with security, at a reception, or at a Genetec ClearID™ Self-Service Kiosk.
- **Display registration code in visitor last name field (Visitor management task in Security Desk):**

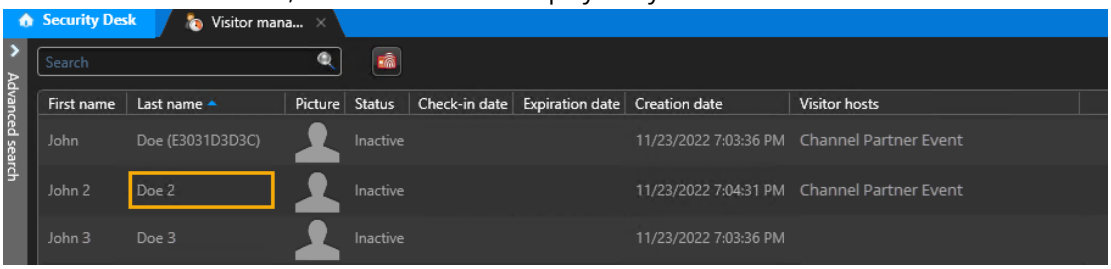
- If the checkbox is selected, the last name field displays the last name of the visitor and the QR code value. This checkbox is selected by default.

  The checkbox must be selected for a QR code scanner to successfully scan and locate a pre-registered visitor in Security Desk.



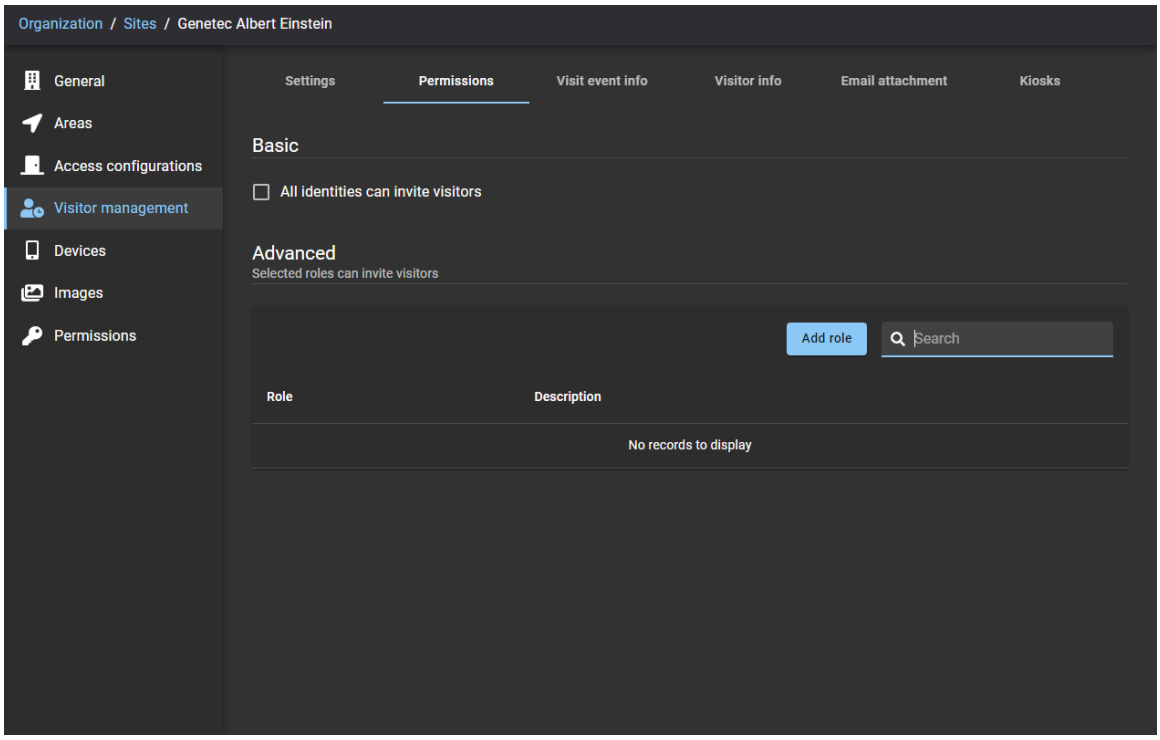
  TIP: You can use a Zebra QR code scanner to enter the QR code in the **Last name** field for you. In the *Visitor management* task in Security Desk, click in the **Search** field, scan the QR code and press **Enter**.

- If the checkbox is cleared, the last name field displays only the last name of the visitor.



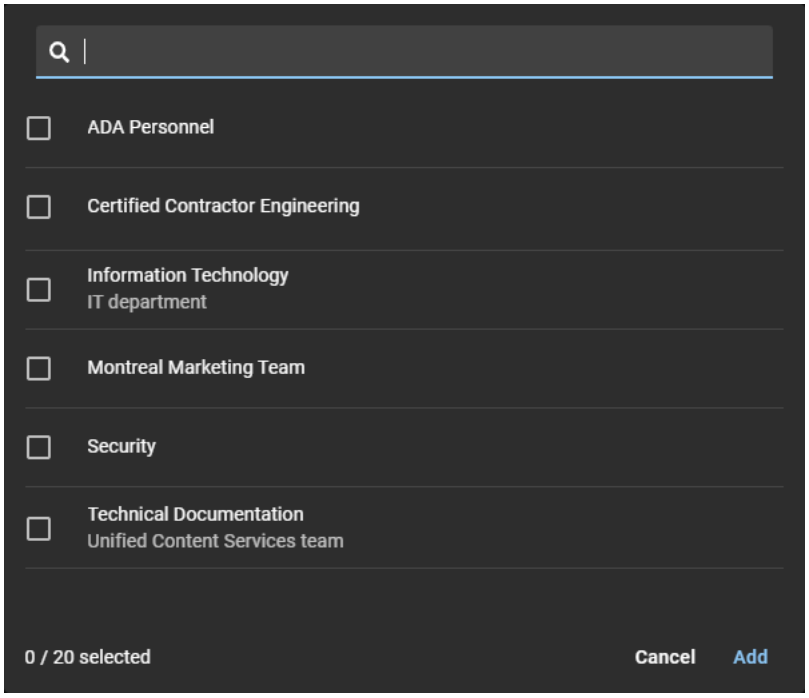
NOTE: When the registration code option is changed, only visitors created after the change are modified, previously created visitors remain unchanged.

5 (Optional) Click the **Permissions** tab.



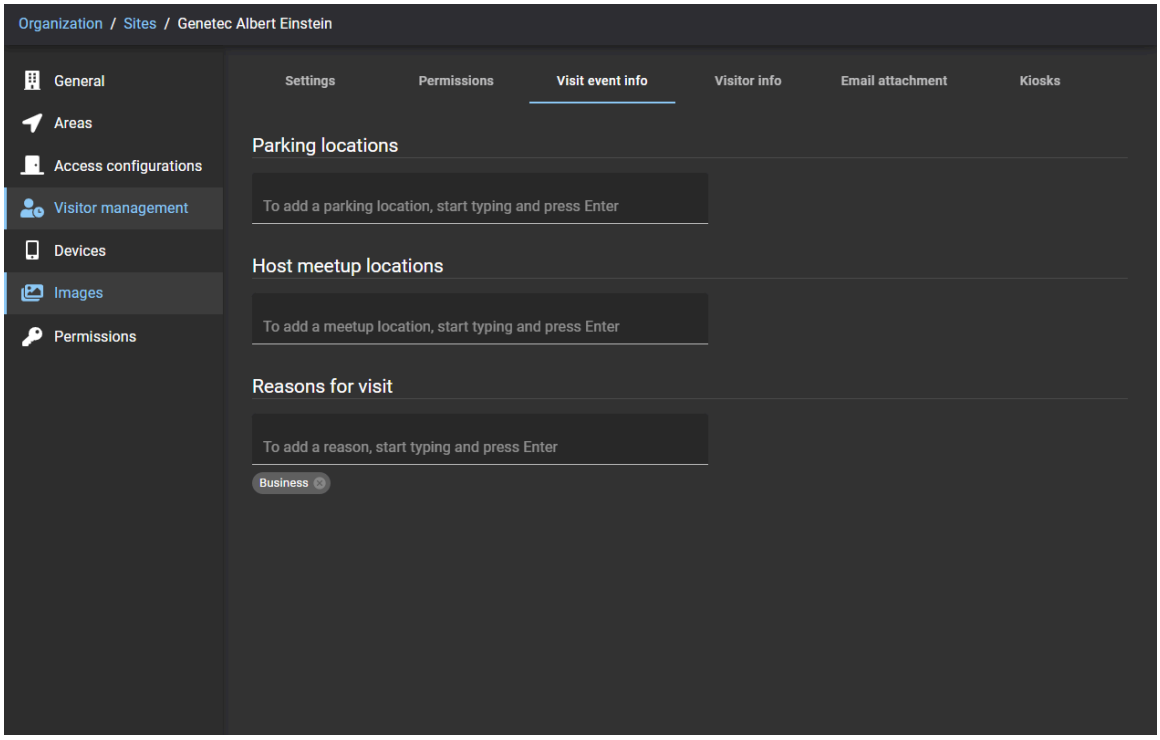
Do one of the following:

- In the *Basic* section, select the **All identities can invite visitors** checkbox if you want all identities to be able to invite visitors to this site.
- In the *Advanced* section, click **Add role** if you want to use roles to manage who can invite visitors to this site. You can then search for or select the roles that you require and click **Add**.



TIP: When adding new role permissions, advise role members to log off and log on, if they want to load the new visitor invite permissions immediately.

6 (Optional) Click the **Visit event info** tab and configure the options you require:



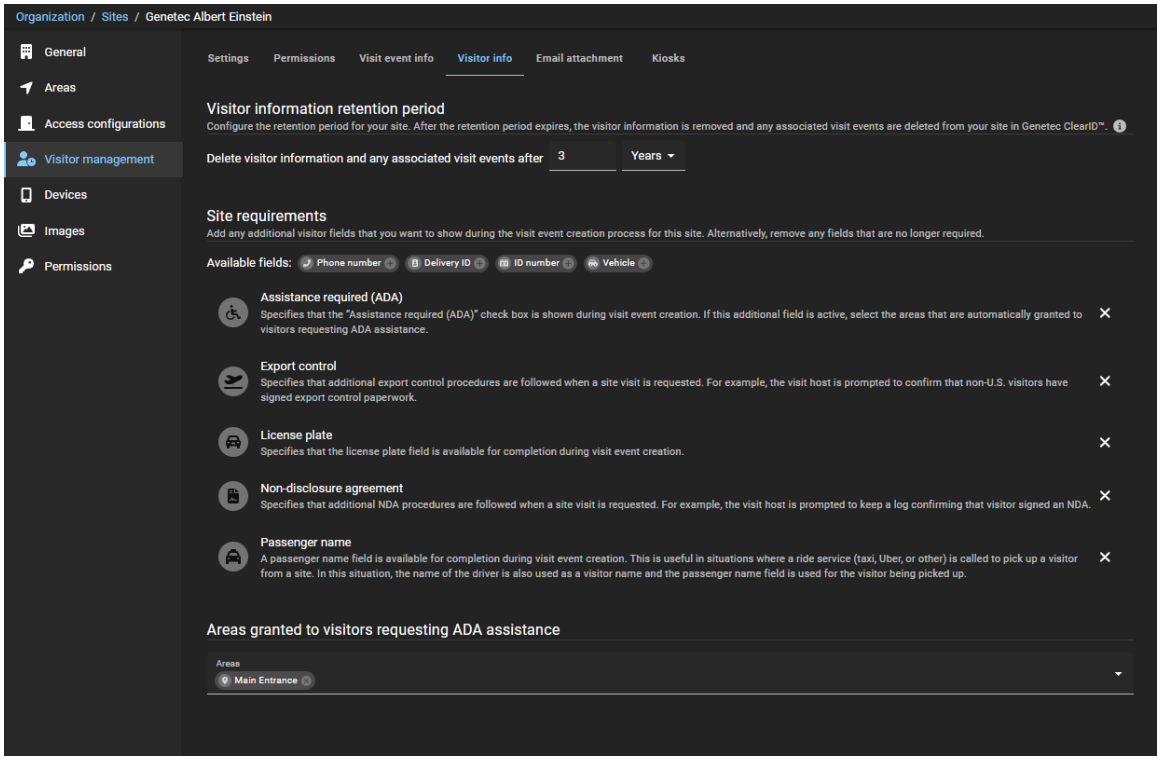
a) In the *Parking locations* section, add parking locations.

b) In the *Host meetup locations* section, add meetup locations.

c) In the *Reasons for visit* section, add the typical reasons for visits to your site.

For example, customer meeting, partner meeting, job interview, delivery, taxi pickup, Uber pickup, lift pickup, and so on.

7 (Optional) Click the **Visitor info** tab and configure the options you require:

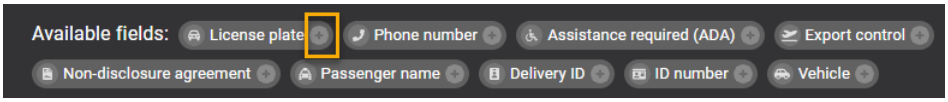


a) In the *Visitor information retention period* section, select a retention period in days, months, or years.

The default retention period is 1 year and the maximum is 3 years.

NOTE: The retention period is configurable by site to comply with the different data laws that might apply in your region.

b) In the *Site requirements Available fields* section, click ⊕ to add each additional field that you want to include during the visit event creation process for your site.



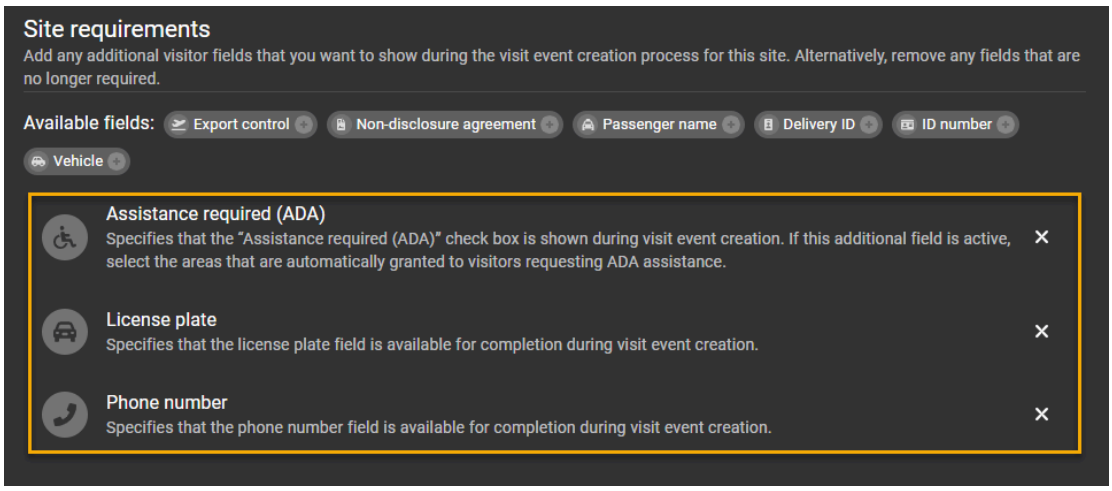
- **License plate:** If selected, a license plate field is provided when a site visit is requested.
- **Phone number:** If selected, a phone number field is provided when a site visit is requested.
- **Assistance required (ADA):** If selected, an *Areas granted to visitors requesting ADA assistance* section is displayed.

  NOTE: This assistance option is used to comply with the Americans with Disabilities Act (ADA).
- **Export control required:** If selected, additional export control procedures are followed when a site visit is requested. For example, the visit host is prompted to confirm that non-U.S. visitors have signed export control paperwork.
- **Non-disclosure agreement:** If selected, additional NDA procedures are followed when a site visit is requested. For example, the visit host is prompted to keep a log confirming that the visitor signed an NDA.
- **Passenger name:** If selected, a passenger name field is provided when a site visit is requested. This passenger name field is useful in situations where a ride service (taxi, Uber, or other) is called to

pick up a visitor from a site. In this situation, the name of the driver is also used as a visitor name and the passenger name field is used for the visitor being picked up.

- **Delivery ID:** If selected, a delivery ID field is provided when a site visit is requested.
- **ID number:** If selected, an ID number field is provided when a site visit is requested.
- **Vehicle:** If selected, an extra expected vehicle details field is provided when a site visit is requested.

NOTE: As fields are added, they are displayed in the *Available fields* later in the section.



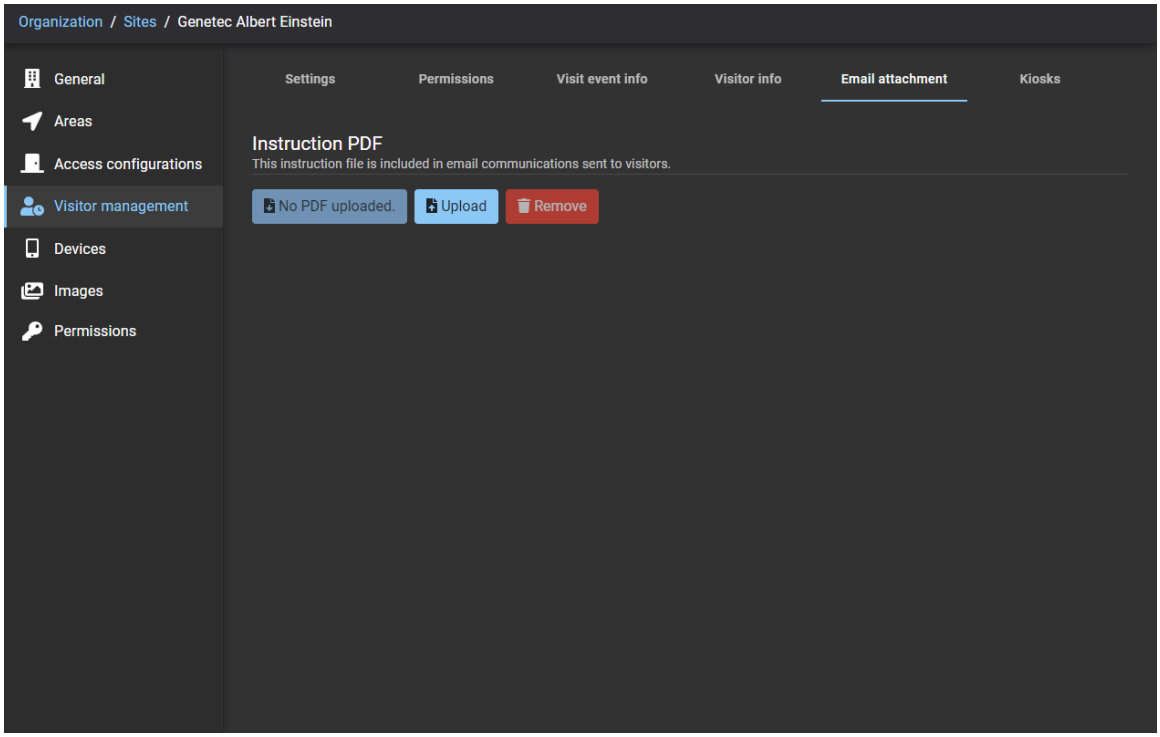
c) (Optional) If you added **Assistance required (ADA)** to your site requirements, in the *Areas granted to visitors requesting ADA assistance* section, add areas that should automatically be granted to visitors requesting ADA assistance.

NOTE: When an employee invites a visitor that requires accessibility assistance to the site, the visitor is automatically added to the list of ADA areas.

For example, If there is a special door for wheelchair access, the people responsible for the site or facilities add that door for wheelchair access in a specific area and add the area to the list of areas granted to visitors that request ADA assistance. If a visitor checks in with ADA enabled, ClearID grants the visitor access to this door, but not other visitors.

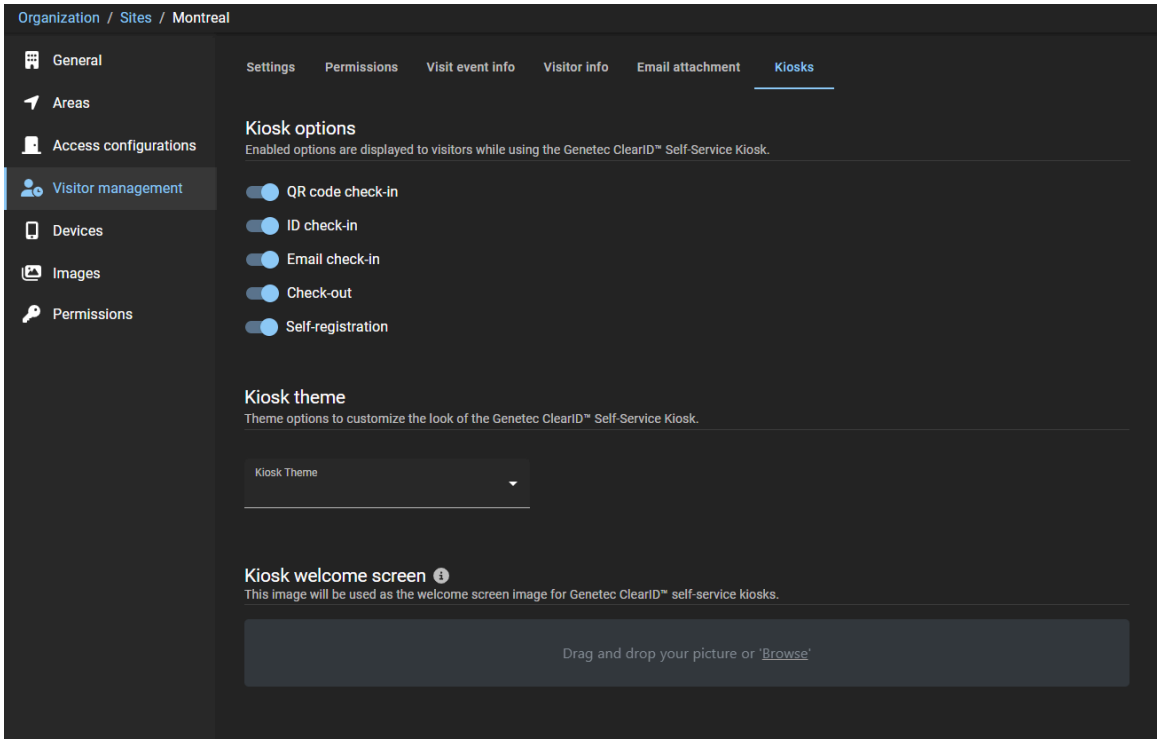
d) (Optional) Click ✕ to remove any visitor fields that are no longer required.

8 Click the **Email attachment** tab and select the options you require:



- **Instruction PDF:** This instruction file is used if you want to automatically include a Visit Instructions File PDF in email communications with visitors. For example, location details, site map, travel instructions, and so on. Regardless of the uploaded file name, the downloadable instruction file is saved as *VisitInstructionsFile.pdf*.
  - **No PDF uploaded:** Indicates that no Instruction PDF has been uploaded yet.
  - **VisitInstructionsFile.pdf:** Click to download a copy of the *VisitInstructionsFile.pdf*.
    NOTE: This button is only visible and active after an Instruction PDF has been uploaded.
  - **Upload:** Click to upload a PDF instruction file.
    BEST PRACTICE: If your instruction file is a word document, click **Save as Adobe PDF** before uploading to ensure that visitors cannot modify the procedure.
  - **Remove:** Click to remove a Visit Instructions File PDF from email communications with visitors.

9 Click the **Kiosks** tab to customize your kiosk configuration.

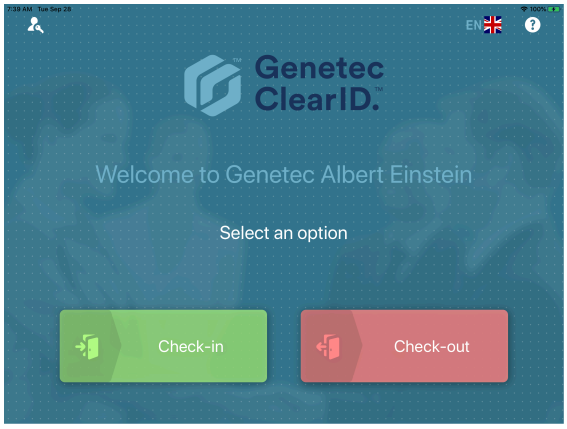


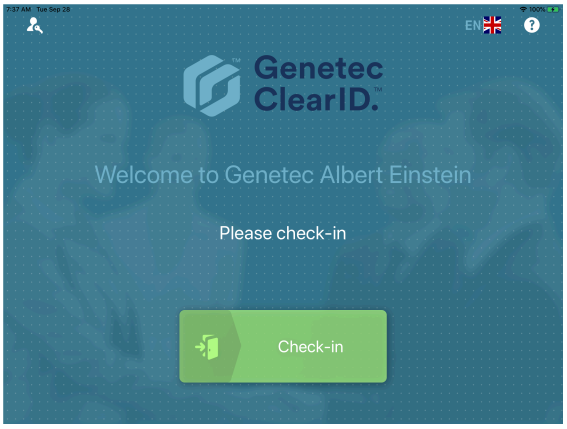
10 (Optional) Customize the **Kiosk options**.

These options customize the choices that are displayed to your visitors on your ClearID Self-Service Kiosk during the check-in or check-out process.

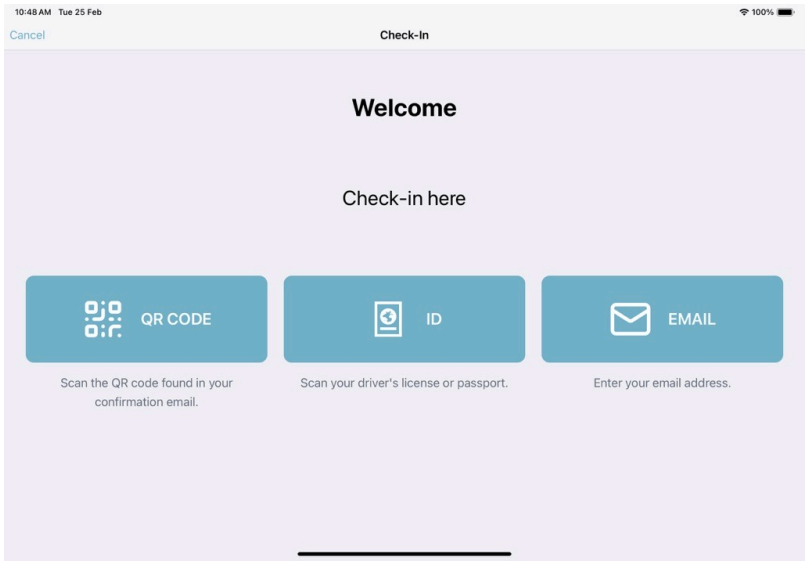
NOTE: The self-registration option is only displayed when all other check-in options are not applicable.

The following example shows the initial check-in or check-out screen customized for two different scenarios.

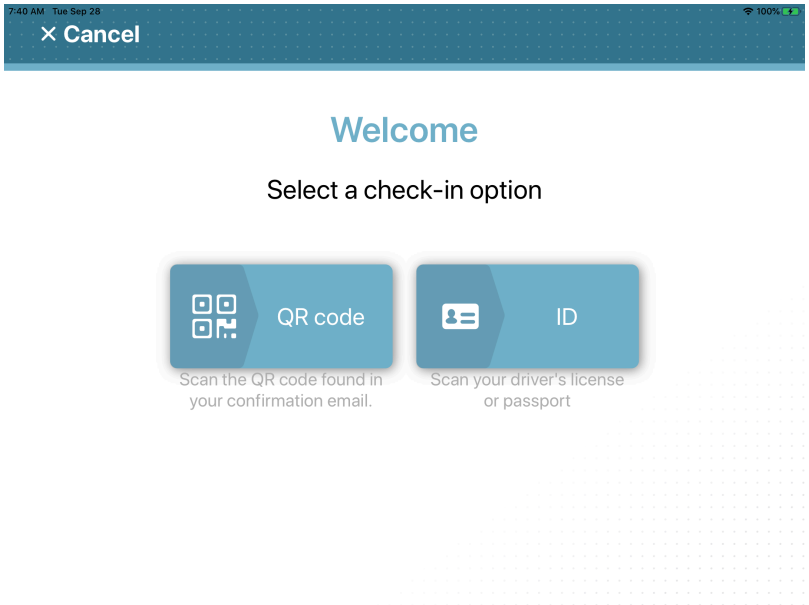




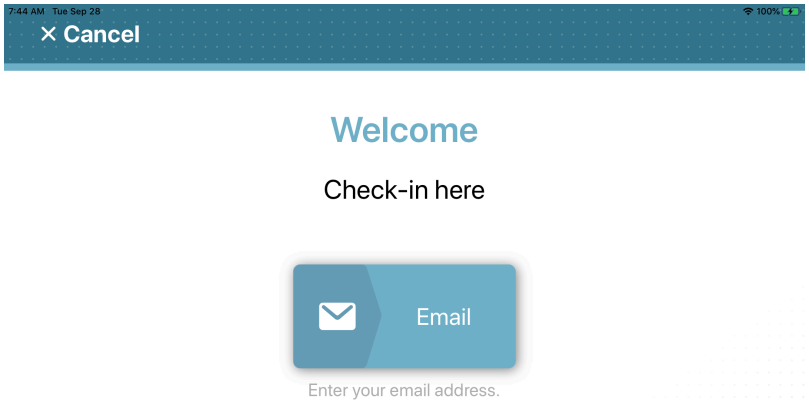
The following example shows the **Kiosk options** customized with **QR code**, **ID**, and **Email** check-in options enabled.



The following example shows the **Kiosk options** customized with **QR code** and **ID** check-in options enabled.



The following example shows the **Kiosk options** customized with only the **Email** check-in option enabled.

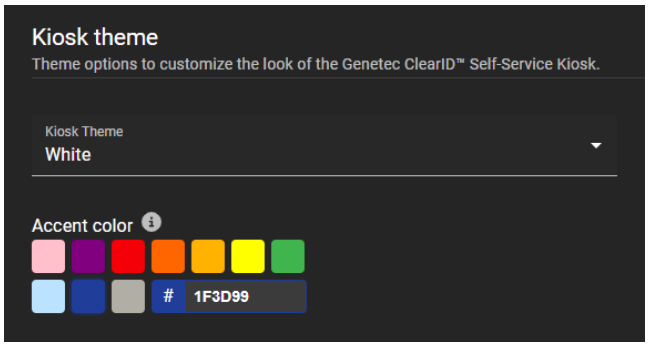


11 (Optional) Customize the **Kiosk theme**.

a) In the *Kiosk theme* section, choose a theme from the following:

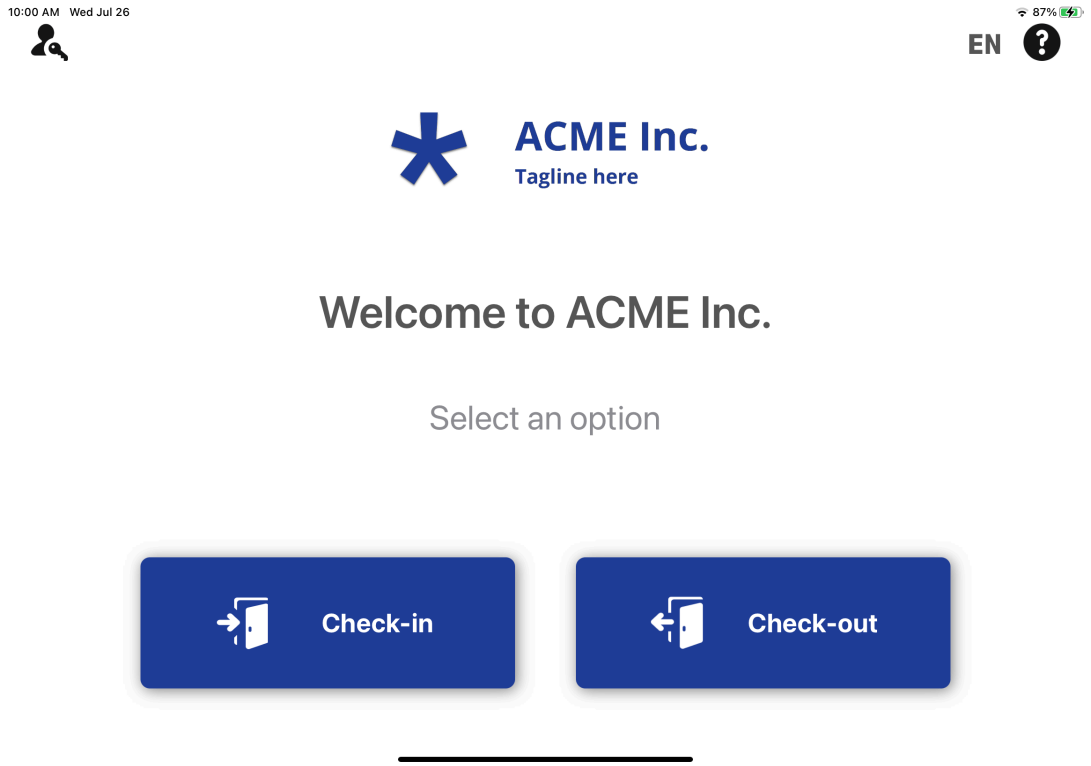
- **ClearID:** The ClearID theme (HEX color code 35768D) has no accent color.
- **White:** The white theme includes extra controls to pick an accent color. For example, to align with your corporate branding.

b) If you chose the **White** kiosk theme, select an accent color.

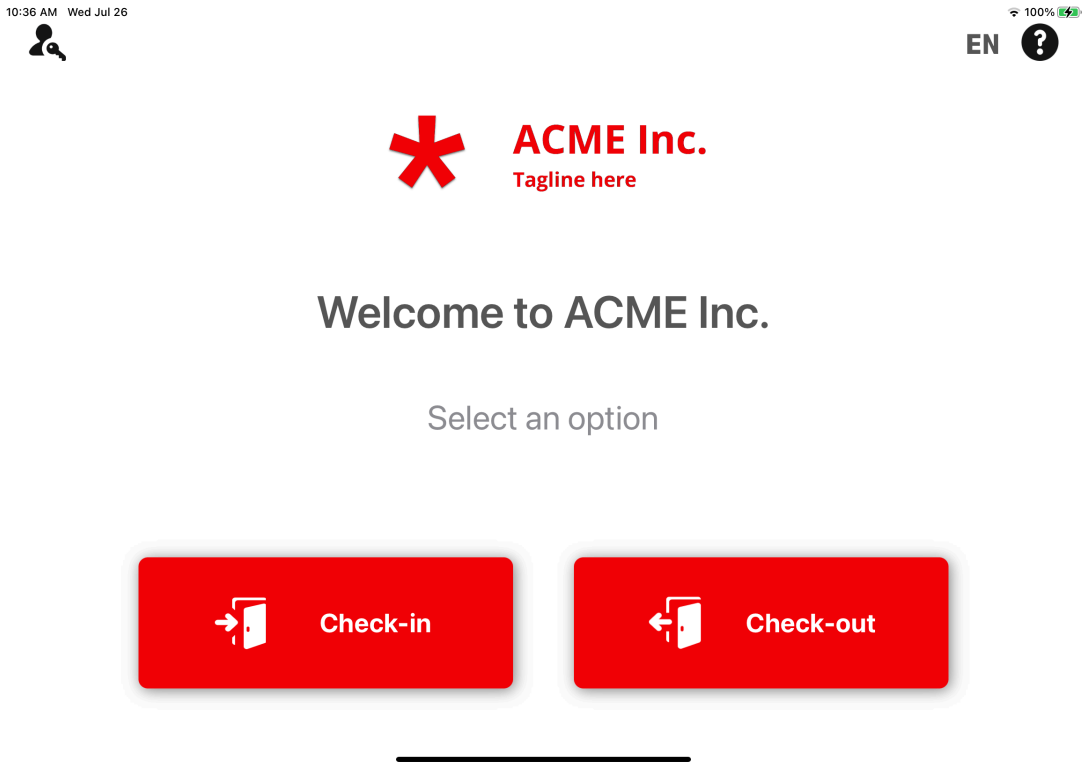


The accent color is applied to the buttons displayed on the ClearID Self-Service Kiosk.

The following example shows the white theme with blue accent color to match the blue corporate branding seen in the example.



The following example shows the white theme with red accent color to match the red corporate branding seen in the example.

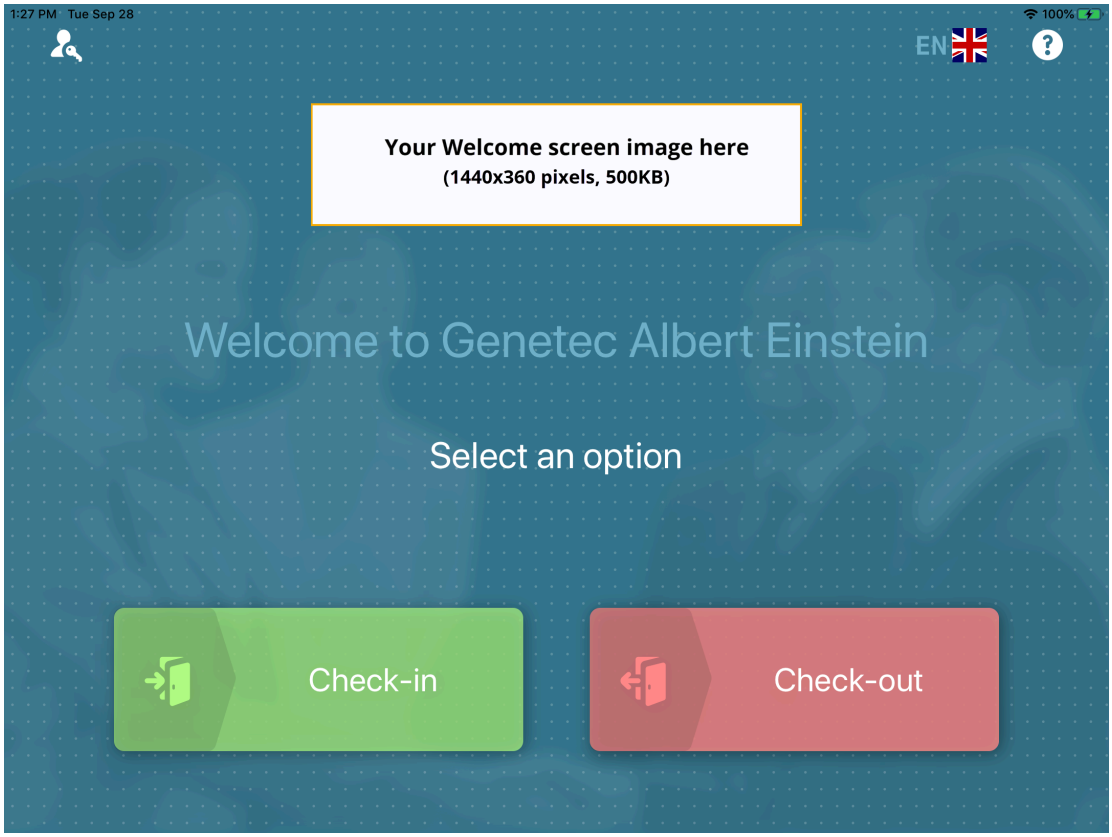

10:36 AM Wed Jul 26
100%
EN
ACME Inc.
Tagline here
Welcome to ACME Inc.
Select an option
Check-in
Check-out

12 (Optional) Customize the **Kiosk welcome screen**.

a) In the *Kiosk welcome screen* section, drag and drop your picture or browse to select a **Kiosk welcome screen** image.

This image is used as the welcome screen *company name* or *logo* for the kiosk.

The following example shows the welcome screen with a custom logo image.



13 Click **Save**.

NOTE: Kiosk options changes are synchronized with your kiosk every 60 seconds.

Visitor management is enabled for the site.

After you finish

Submit an access request or visit request for this site.

Related Topics

Introduction to the ADA

Visit Instructions file (Example PDF)

About workflows on page 12

Inviting visitors on page 359

Self-Service Kiosk check-in on page 561

Enabling QR code credentials for visitors on page 391

Viewing sites where a user can invite visitors

An account administrator might need to view the list of sites where a user can invite visitors so that they can verify or update access if required.

Before you begin

- Configure your visitor management settings.
- Add your role members.

What you should know

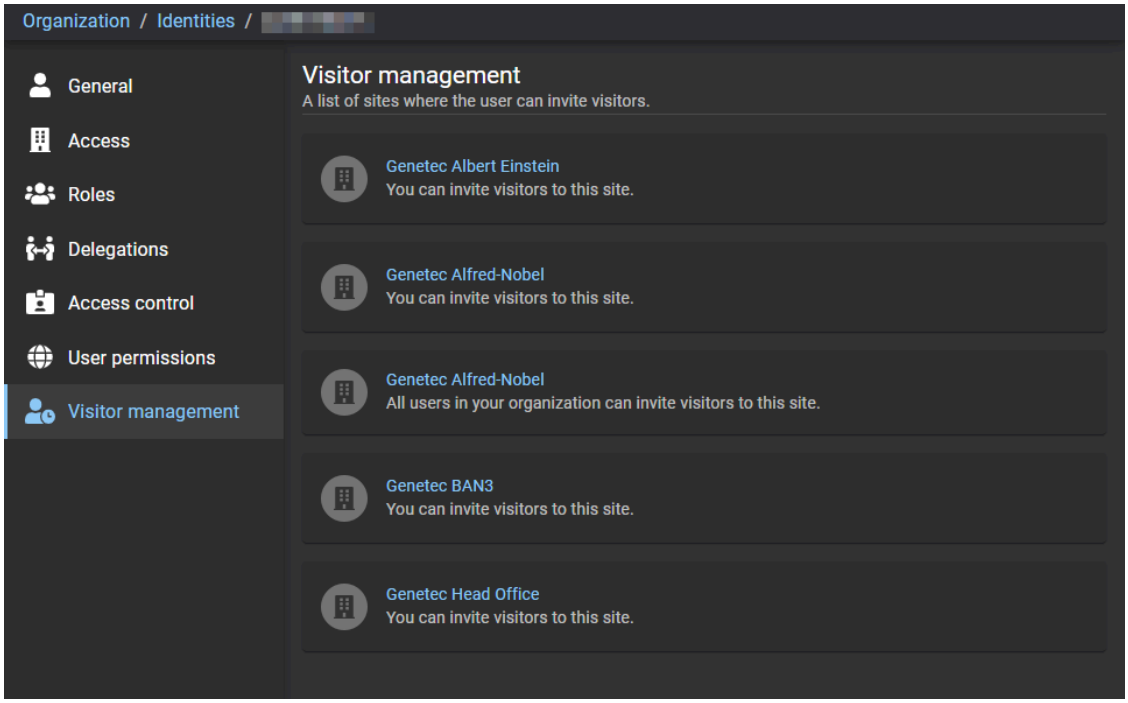
- Only account administrators can view the list of sites where a user can invite visitors or grant user permissions to invite visitors using roles.
- Users are automatically granted *Invite visitors* permissions for their home site by default.

Procedure

1 From the *Home* page, click **Organization** > **Identities**.

2 Search for or select a user.

3 Click **Visitor management** to display the list of sites where the user can invite visitors.



Related Topics

Granting access to the web portal on page 141

Modifying sites

After you add your sites, you can modify the settings of each site individually. An *Account administrator* or *Site owner* can modify the *Site owners*, site properties, and change visitor management options for the site.

Before you begin

Create your sites.

What you should know

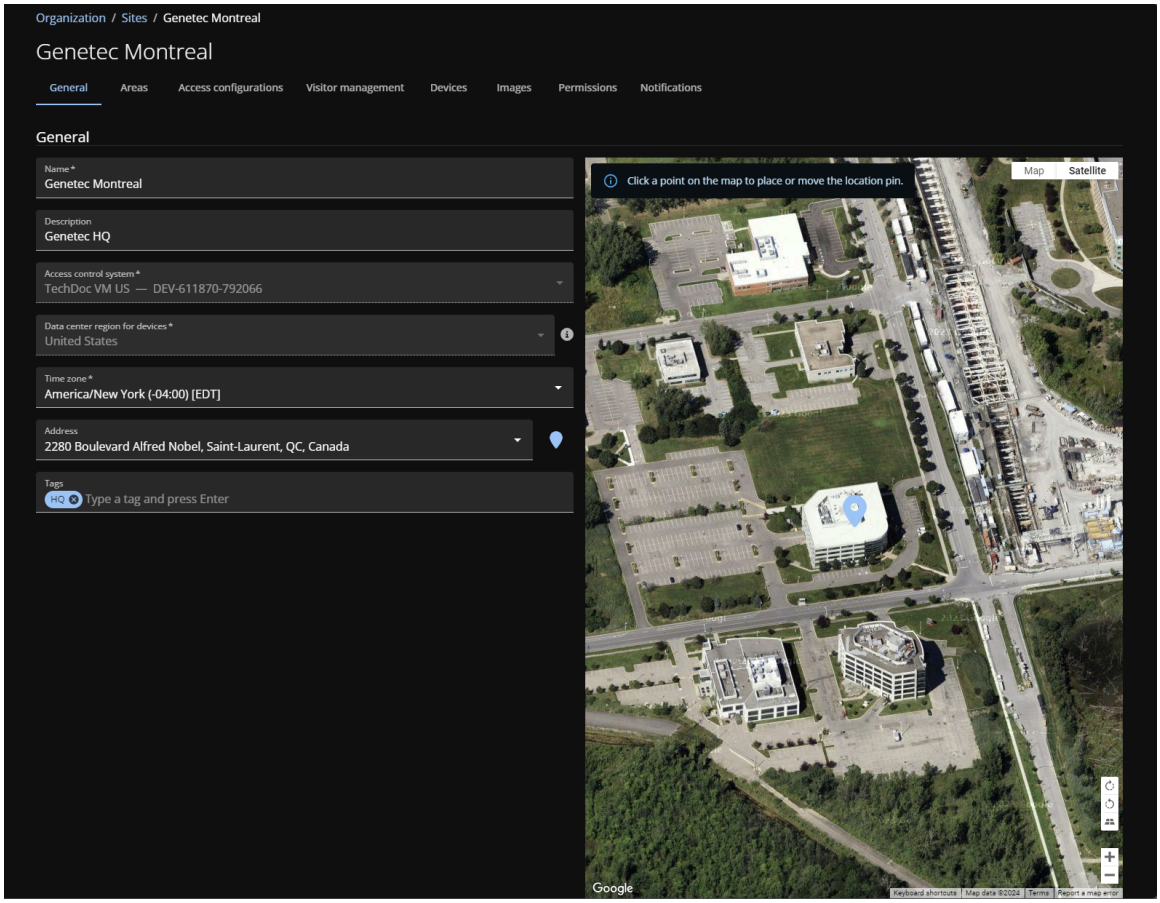
To modify sites in Genetec ClearID™, you must be an *Account administrator* or *Site owner*.

- A *site* is associated with a Security Center access control system.
- Multiple sites can be associated with the same Security Center access control system.

Procedure

1 Click **Organization** > **Sites**.

2 Search for a site using the search field or select a site from the **Site** list.



3 On the *General* page, modify the fields as required.

4 On the *Notifications* page, modify the fields as required.

5 Click **Save**.

Your site settings have been changed.

Related Topics

Creating sites on page 243

Setting a maximum duration for site access

To enforce a limit for identities with temporary access, you can set a site access duration. When the maximum duration limit is reached, their access expires.

What you should know

If the maximum duration for site access function has been activated for your account, the maximum duration limit for site access is enabled by default.

- To set a maximum duration period for site access in Genetec ClearID™, you must be a site owner.
- This access duration period only applies to individual identities or access that was manually granted.
- This access duration period does not apply to role access.

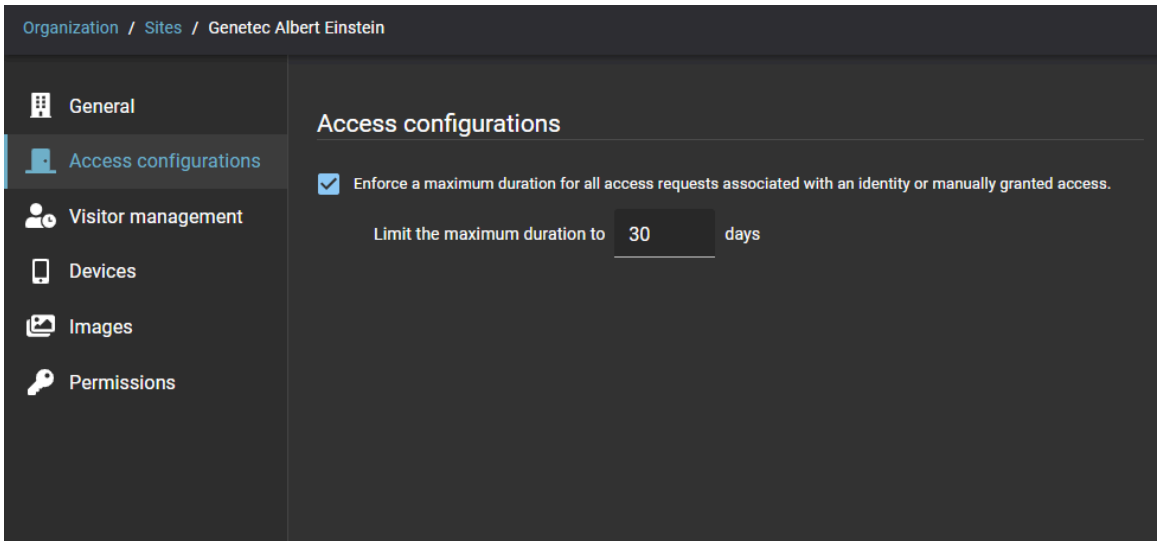
TIP: Use role groups when you have people who require permanent access to a site.

Procedure

1 Click **Organization** > **Sites**.

2 Search for and select a site.

3 Click **Access configurations**.



a) Select the **Enforce a maximum duration for all access requests associated with an identity or manually granted access** checkbox.

b) In the **Limit the maximum duration to** field, enter the maximum duration in days.

You can enter a value in days from 1 to 365. The default value is 30 days.

Related Topics

Adding roles on page 460
Adding role members on page 472
Requesting access on page 151

Configuring access request documents for sites

For sites with extra security measures or requirements, *Site owners* can make it mandatory for employees to upload supporting documents like copies of drivers licenses or certifications when requesting access to areas.

Before you begin

Familiarize yourself with access request workflows.

What you should know

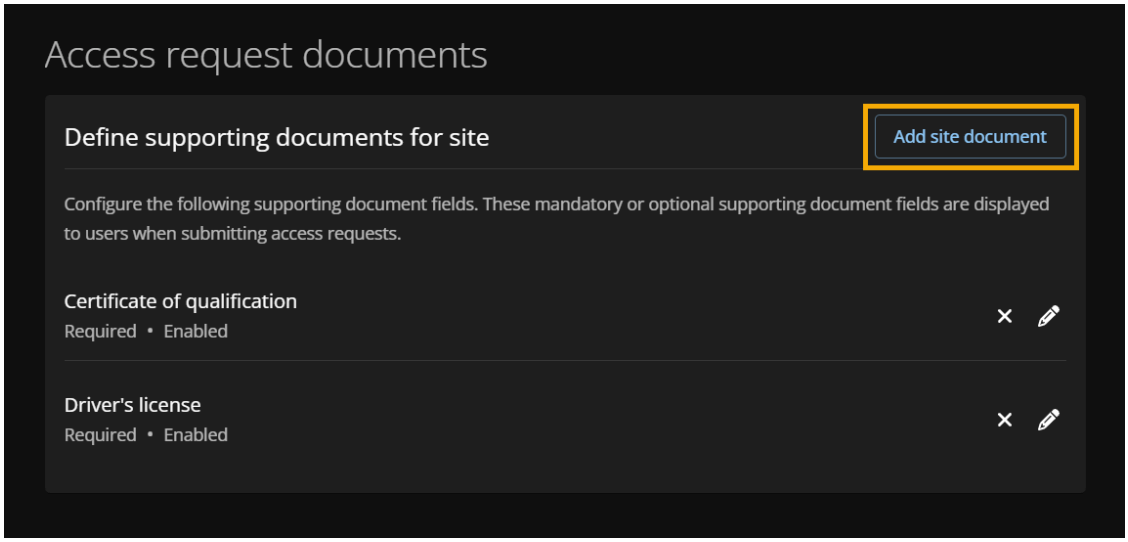
- You must be a *Site owner* to configure mandatory or optional supporting documents for access requests at the site level.
- You can configure up to 20 supporting document types per site.

IMPORTANT: All areas inherit supporting documents configured at the site level. If needed, site owners can remove site level supporting document configurations from an area by accessing area access request settings.

Procedure

1 In the Genetec ClearID™ web portal, click **Organization** > **Site** > **Access configurations**.

2 Under *Define supporting documents for site*, click **Add site document**.



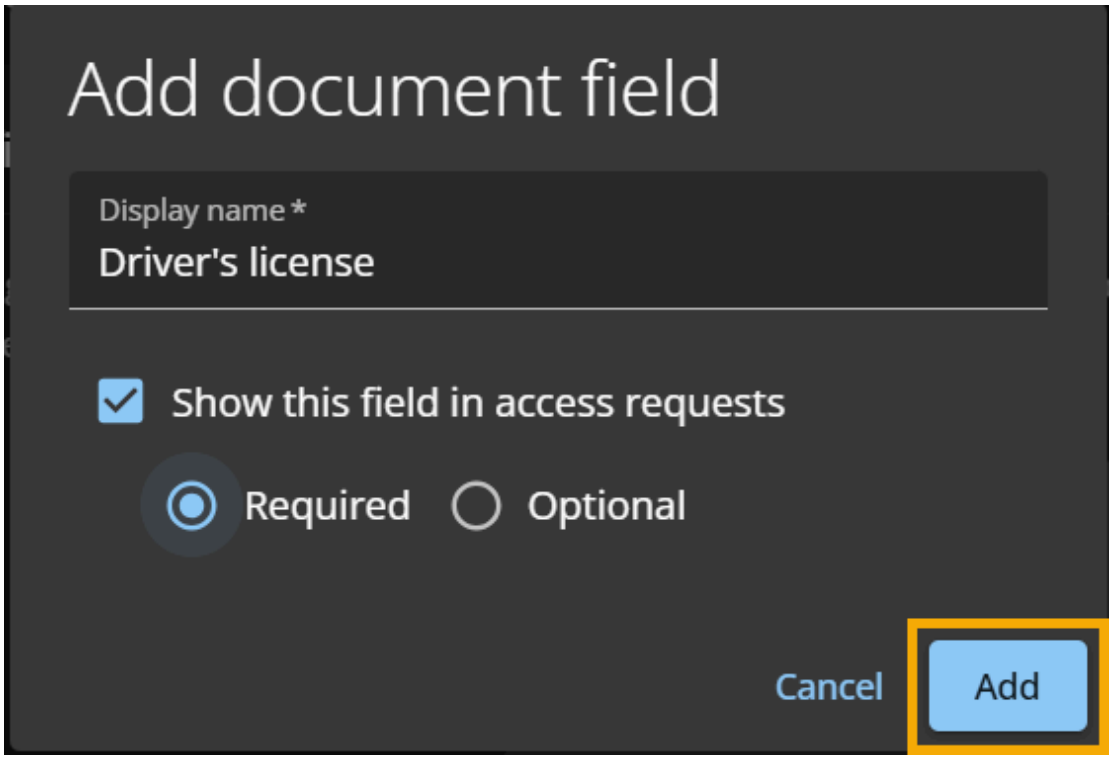
a) In the *Display name* field, enter a name for the document type.

b) Select **Show this field in access requests** to display the document field in access requests for the site.

TIP: When the checkbox is cleared, the document type remains available in draft mode.

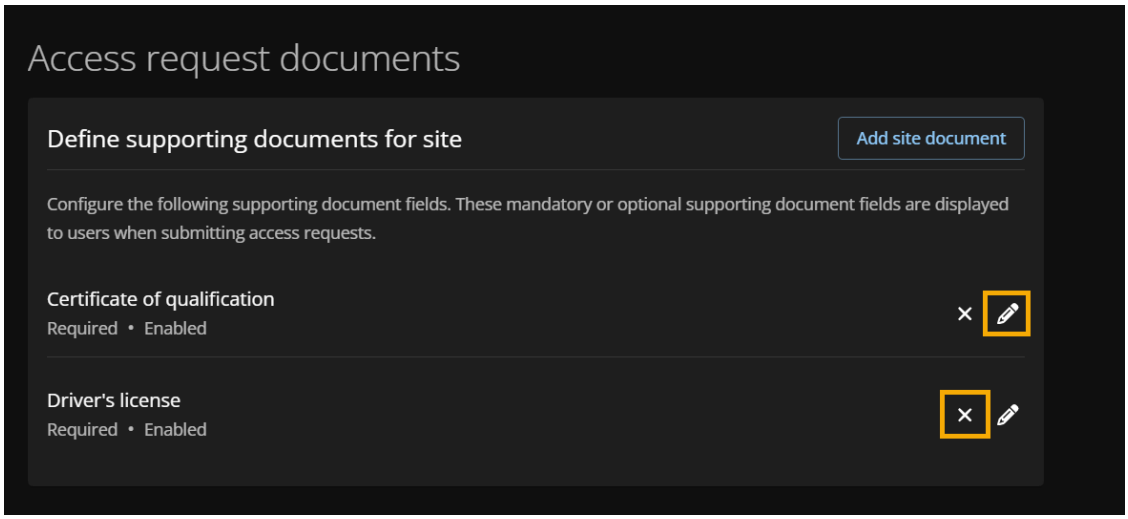
c) Choose whether or not uploading the document is mandatory when submitting an access request by clicking the **Required** or **Optional** radio button.

NOTE: You can configure a combination of mandatory and optional document types to appear in a single access request.



3 Click **Add**.

4 (Optional) You can modify or remove each document type:



a) Click ✎ to modify the configuration of a supporting document.

b) Click ✕ to remove a configured supporting document.

Customizing email notifications for sites

To communicate specific requirements with email recipients, *Account administrators* and *Site owners* can customize the header and footer text of email notifications sent out by Genetec ClearID™.

What you should know

You can customize the header and footer text for two types of email notifications:

- Access granted notifications
- Visitor confirmation notifications

Procedure

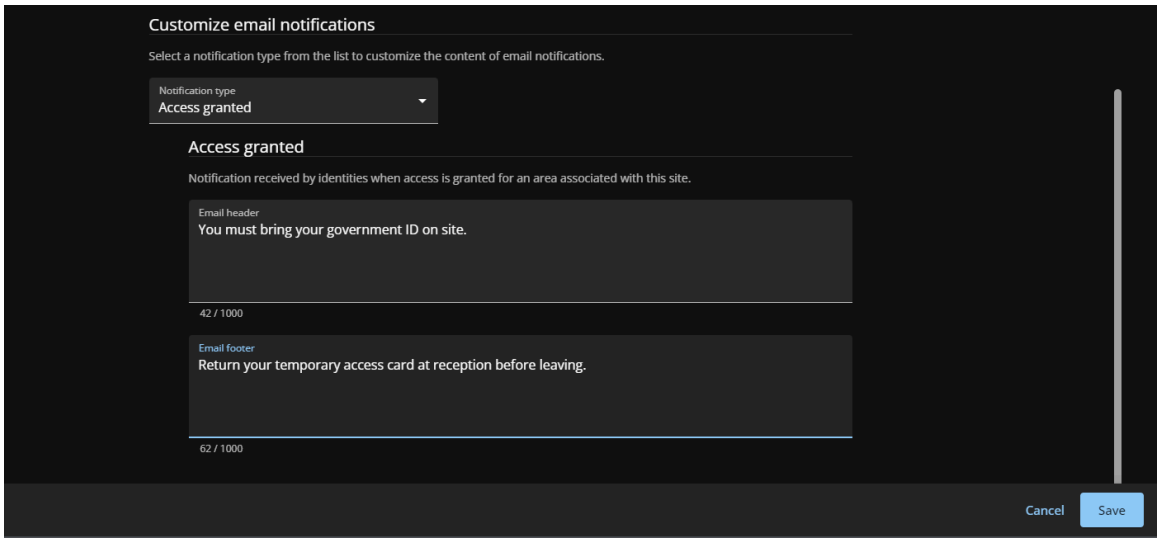
1 Click **Organization** > **Sites** > **Notifications**.

2 From the **Notification type** list in the *Customize email notifications* section, select the type of email you want to customize.

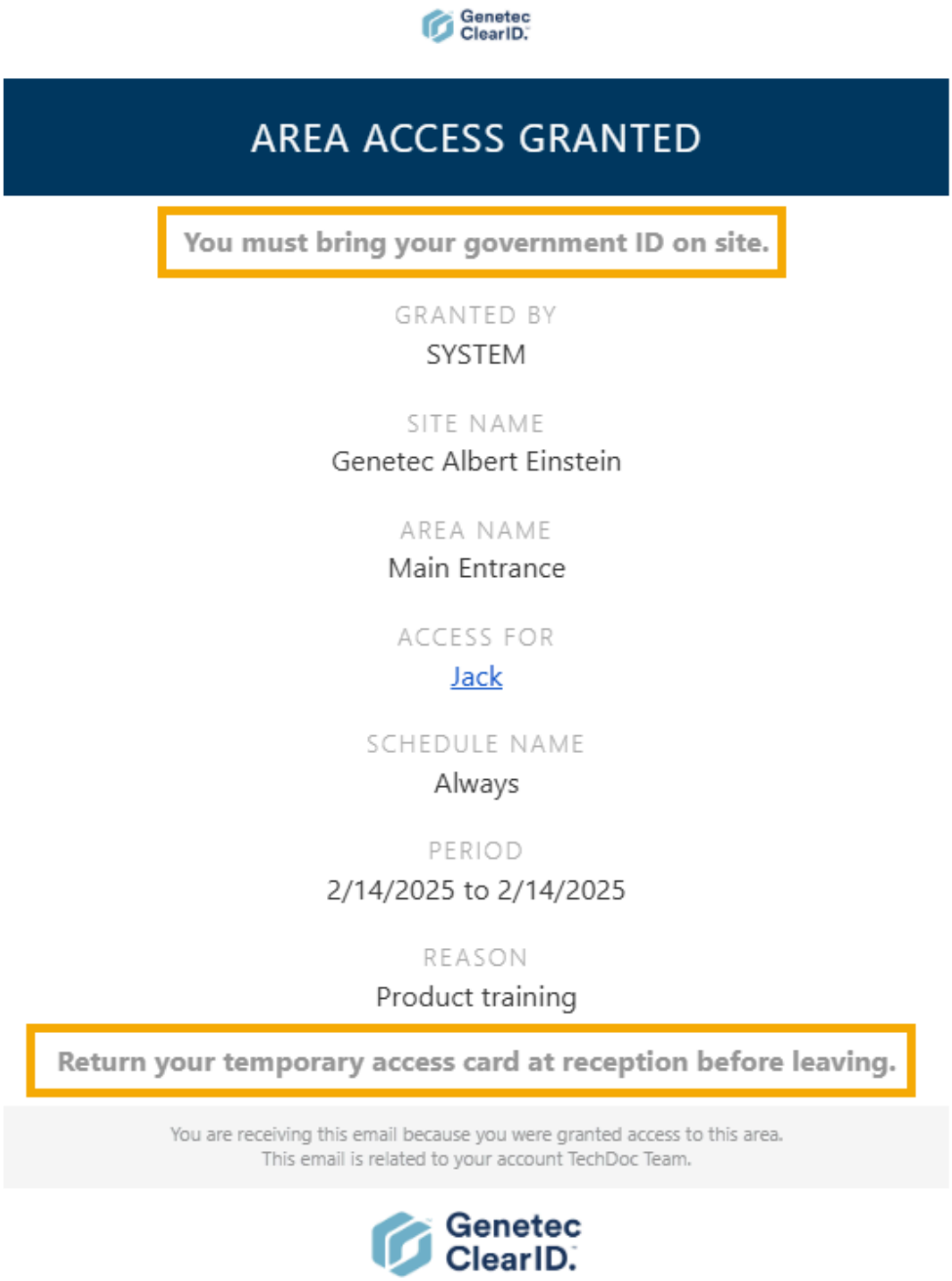
a) In the **Email header** field, type the header text. For example, use the custom text fields to communicate equipment or documentation requirements to visitors or steps to complete before accessing an area.

b) In the **Email footer** field, type the footer text.

NOTE: Custom text in the header and footer of notification emails is limited to 1,000 characters.



3 Click **Save**.
Email notifications sent out by ClearID use your customized text in the header and footer.



Customizing email notification branding

As an *Account administrator*, you can customize the color scheme of Genetec ClearID™ email notifications to align with your company's branding.

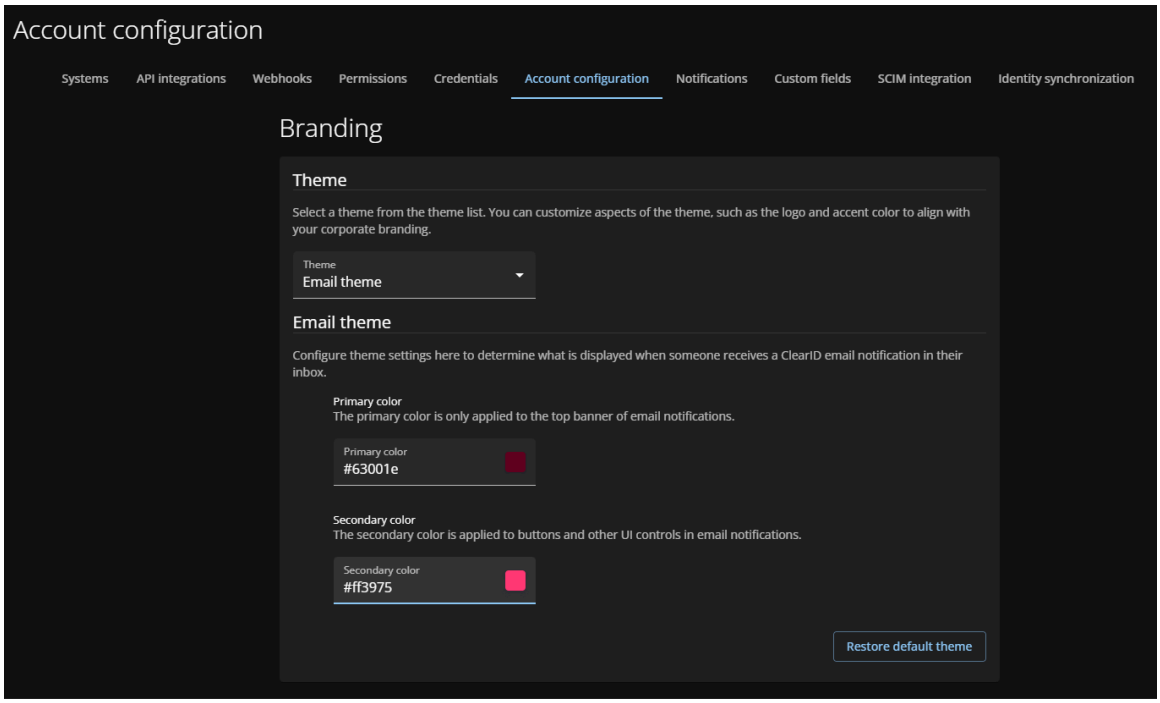
What you should know

You must be an *Account administrator* to customize email notification branding.

Procedure

1 In the ClearID web portal, click **Administration** > **Account configuration**.

2 In the *Branding* section, select **Email theme** from the **Theme** list.



3 In the *Email theme* section, configure the colors for email notifications:

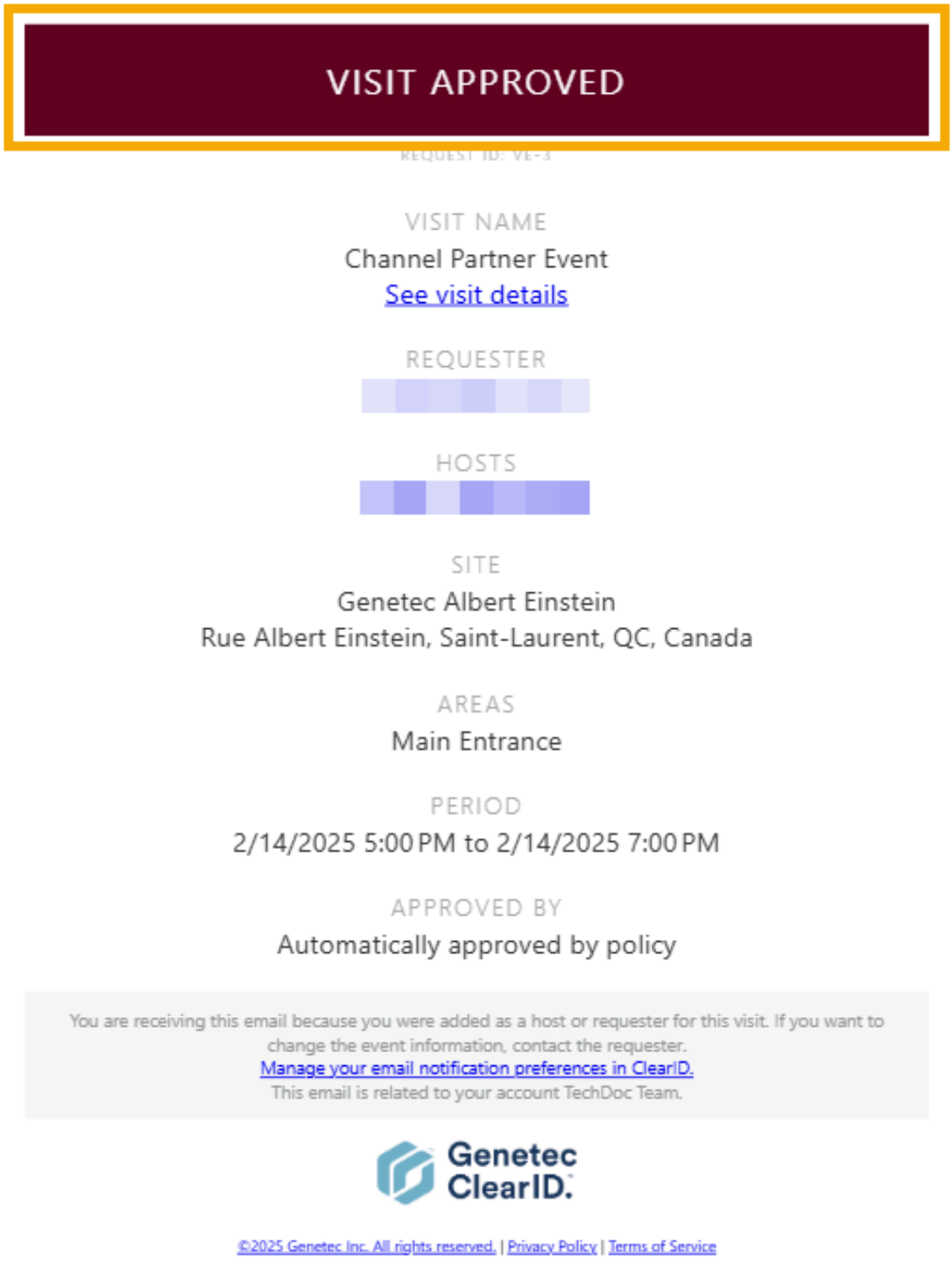
a) In the **Primary color** field, use the color picker to select a primary color to apply to the top banner of email notifications.

b) In the **Secondary color** field, use the color picker to select a secondary color to apply to buttons and other UI controls in email notifications.

TIP: You can reset the email theme colors to default by clicking the **Restore default theme** button.

4 Click **Save**.

Customized branding is applied to the top banner, buttons, and UI controls of email notifications sent by ClearID.


VISIT APPROVED
VISIT NAME
Channel Partner Event
See visit details
REQUESTER
HOSTS
SITE
Genetec Albert Einstein
Rue Albert Einstein, Saint-Laurent, QC, Canada
AREAS
Main Entrance
PERIOD
2/14/2025 5:00 PM to 2/14/2025 7:00 PM
APPROVED BY
Automatically approved by policy
You are receiving this email because you were added as a host or requester for this visit. If you want to change the event information, contact the requester.
Manage your email notification preferences in ClearID.
This email is related to your account TechDoc Team.
Genetec ClearID.
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About access reviews

An access review is the process of performing an access review for an area, role, or identity to confirm that the access is still required and valid. To ensure security compliance and audit readiness you can schedule your access reviews to occur automatically.

Traditionally, security personnel manually export list of access and send to area owners to review twice a year, or every quarter.

In Genetec ClearID™ these access reviews can be scheduled (automated) or initiated manually. A site manager or owner is responsible for configuring access review frequency or manually initiating access reviews to ensure that the review process occurs on time.

- **Site owners:** Access reviews are displayed in the **Access reviews report**.
- **Area managers or role managers:** Area access reviews are displayed in **My Tasks** and notification emails.
- **Supervisors:** Identity access reviews are displayed in **My Tasks** and notification emails.

NOTE: Only site owners can access the **Access review reports**. Area managers can only access reviews for areas that they manage. Supervisors can only access reviews for their direct reports.

You cannot schedule a review for a site that has no areas. If a role or group is associated with an area or room, the role or group becomes part of the area review automatically. All **Completed** reviews are retained for audit and tracking purposes.

Example

Scheduled access reviews

You can schedule site access reviews to occur yearly, monthly, weekly, or now to suit your needs.

- A site access review for a *Server Room* area could be scheduled to occur **Yearly**. For example, at quarterly intervals, on the first day of the month at 08:00.
- A site access review for a *Data Center* area could be scheduled to occur **Monthly**. For example, on the first day of every month at 08:00.

Manual access reviews

You can start an access review manually using the **Now** schedule when required, to ensure security compliance and audit readiness. Typically manual access reviews are used to test reviews in preparation for an annual review or scheduled reviews to check that all participants are properly set, or to force a review after an incident.

Access review email notifications

Access review email notifications are sent to relevant approvers to indicate that an area or role access review is pending. Site owners do not receive any email notifications.

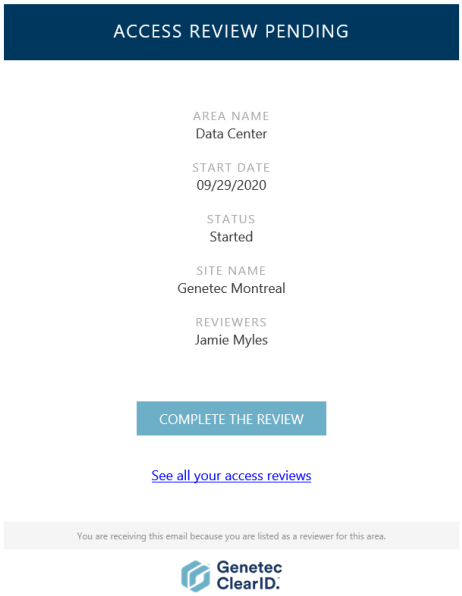


Figure 3: Access review pending email notification

- When the **COMPLETE THE REVIEW** hyperlink is clicked, the access review detailed in the email notification is displayed and ready for review.
- When an area manager or role manager clicks the **See all your access reviews** hyperlink, the **My access reviews** page is displayed. This view only displays access reviews relevant to the approver.

Access review email notification reminders are sent every 7 days. Access review email notifications are sent from *noreply@clearid.io*. Check your spam or junk folder if email notifications are not received.

The status of incomplete access reviews are automatically updated to the **Expired** state when the incomplete access review is replaced by a newer scheduled review with the same name or when the **Enforce an expiration for access reviews** option is active and the expiration period has been exceeded.

All **Completed** reviews are retained for audit and tracking purposes. No changes can be made to an access review after it has been completed.

Related Topics

Access Reviews Feature Note (2 pages)

Setting up automatic expiration for access reviews

To ensure that reviewers only review current access information, you can specify an expiration period for access reviews. Failure to set an expiration could result in reviewers reviewing outdated information.

Before you begin

Learn about access reviews.

What you should know

Only an account administrator can configure the expiration settings for access reviews.

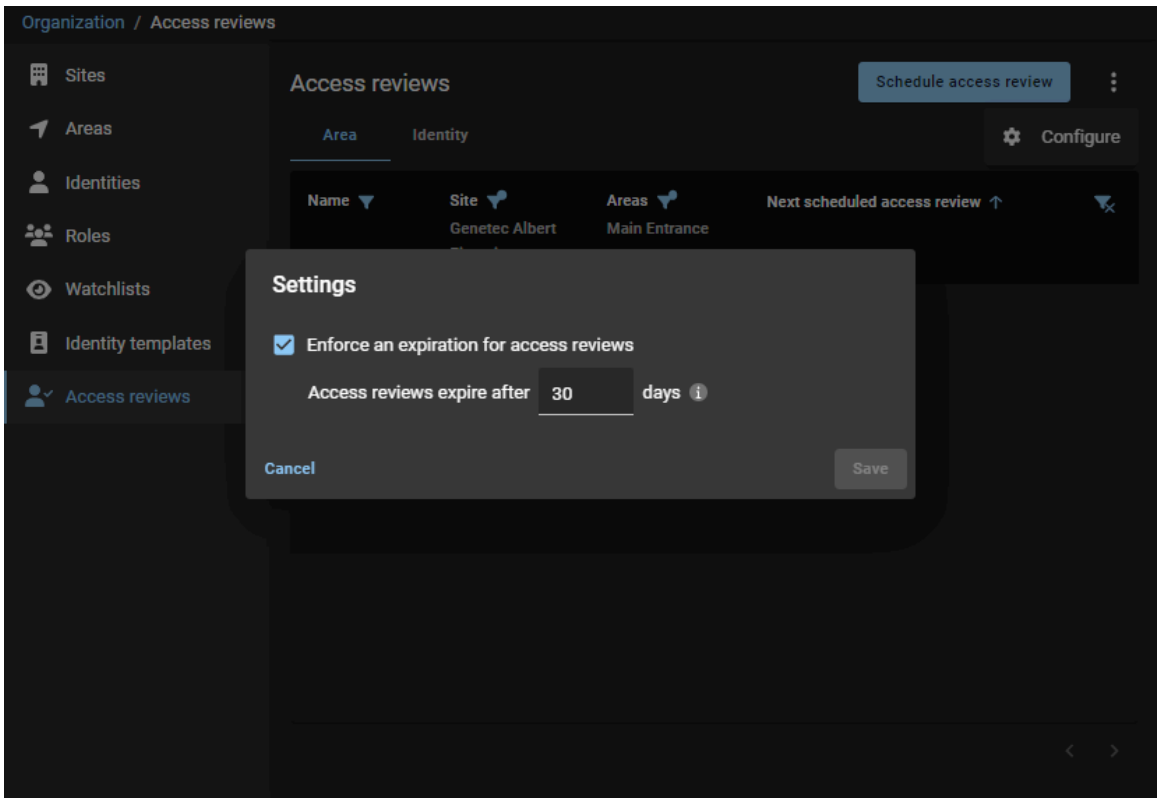
BEST PRACTICE: The access reviews expiration setting is enabled by default and the default expiration period is set at 30 days.

- The expiration duration set for access reviews applies to all access reviews in the system.
- The new expiration setting is only applied to access reviews created after the setting is enabled or modified.
- When the access reviews expire, their status is set to Expired.
  - Access reviews displayed in **My tasks** are then changed to Completed with the status Expired.

Procedure

1 From the homepage, click **Organization** > **Access reviews**.

2 Click . then click **Configure**.



3 In the *Settings* dialog, select or enter the expiration duration that you require for your organization.

TIP: Pick an expiration interval that matches the access reviews requirement for your organization. Also bear in mind any audit or legal requirements that might be applicable.

4 (Optional) If your organization does not want to enforce expiration for access reviews, clear the **Enforce an expiration for access reviews** checkbox.

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

After you finish

Set up your access reviews.

Setting up area access reviews

To ensure security compliance and audit readiness, you can set up area access reviews to occur at scheduled intervals. You can also start an area access review manually if required.

Before you begin

- Make sure that the site has areas defined.
- Make sure that the site is not already part of another review.

What you should know

- Only a site owner can set up area access reviews.

BEST PRACTICE: Schedule your site access reviews so that they are automatically triggered the day, week, or month before corporate audits or site safety checks to ensure your security compliance and audit readiness.

Procedure

- In the Genetec ClearID™ web portal, do the following:
  - Schedule your area access reviews

Your area access reviews have now been set up.

After you finish

Do one or more of the following to complete your area access reviews when required:

- Complete an area access review (site owner)
- Complete an area access review (area owner)

Related Topics

Reviewing area access on page 350
Access Reviews Feature Note (2 pages)

Scheduling area access reviews

To ensure security compliance and audit readiness, you can set up area access reviews to occur at scheduled intervals.

Before you begin

- Make sure that the site has areas defined.
- Make sure that the site is not already part of another review.

What you should know

- Only a site owner can schedule area access reviews.
- Site owners can define a review schedule for one or multiple areas under their site.

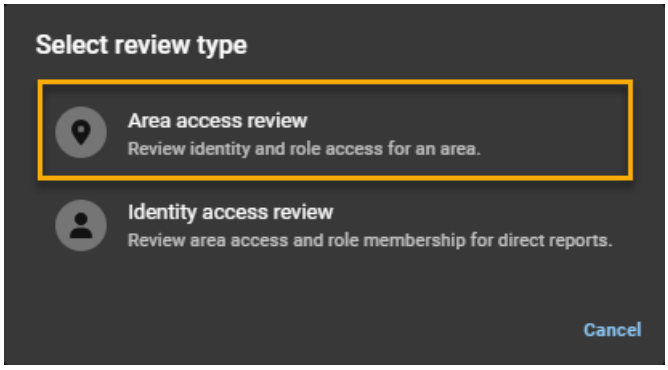
BEST PRACTICE: Schedule your site access reviews so that they are automatically triggered the day, week, or month before corporate audits or site safety checks to ensure your security compliance and audit readiness.

Procedure

1 From the homepage, click **Organization** > **Access reviews**.

2 Click **Schedule access review**.

3 In the **Select review type** dialog, select **Area access review**.



4 In the *Site access review schedule* dialog, select the options that you require.

a) Enter a `Name` for your area access review.

b) Select the **Trigger site reviews** frequency that you require and configure the options.

NOTE: The options that are displayed vary depending on the **Trigger site reviews** frequency that you select.

- **Yearly:** Specifies a site access review that occurs yearly.
- **Monthly:** Specifies a site access review that occurs monthly.
- **Weekly:** Specifies a site access review that occurs weekly.
- **Now:** Specifies a site access review that occurs immediately.

For example, an access review could be started manually using the *Now* schedule. Typically manual access reviews are used to test reviews before an annual review or scheduled reviews to check that all participants are properly set, or to force a review after an incident.

c) If you selected **Yearly**, select the day and month or months that you want the site access review scheduled.

d) If you selected **Monthly**, select the day that you want the site access review scheduled.

e) If you selected **Weekly**, select the day or days that you want the site access review scheduled.

f) Select the time that you want the site access review scheduled.

NOTE: The time shown in the *Site access review schedules* dialog options and all scheduled review times uses the time zone of the site.

g) Search for or select the site that you want to include in your site access review.

h) Search for or select the areas that you want to include in your site access review.

i) (Optional) In the **Notes** field, you can add more details as needed.

The **Notes** field is used to enter more detailed information about the site access review. This field is typically used when the site performs security reviews. For example, an ISO 27001 review or a SOC 1 or SOC 2 audit report.

Example: The following example shows a site access review for a *server room* area scheduled to occur **Yearly** at quarterly intervals, on the first day of the month at 08:00.

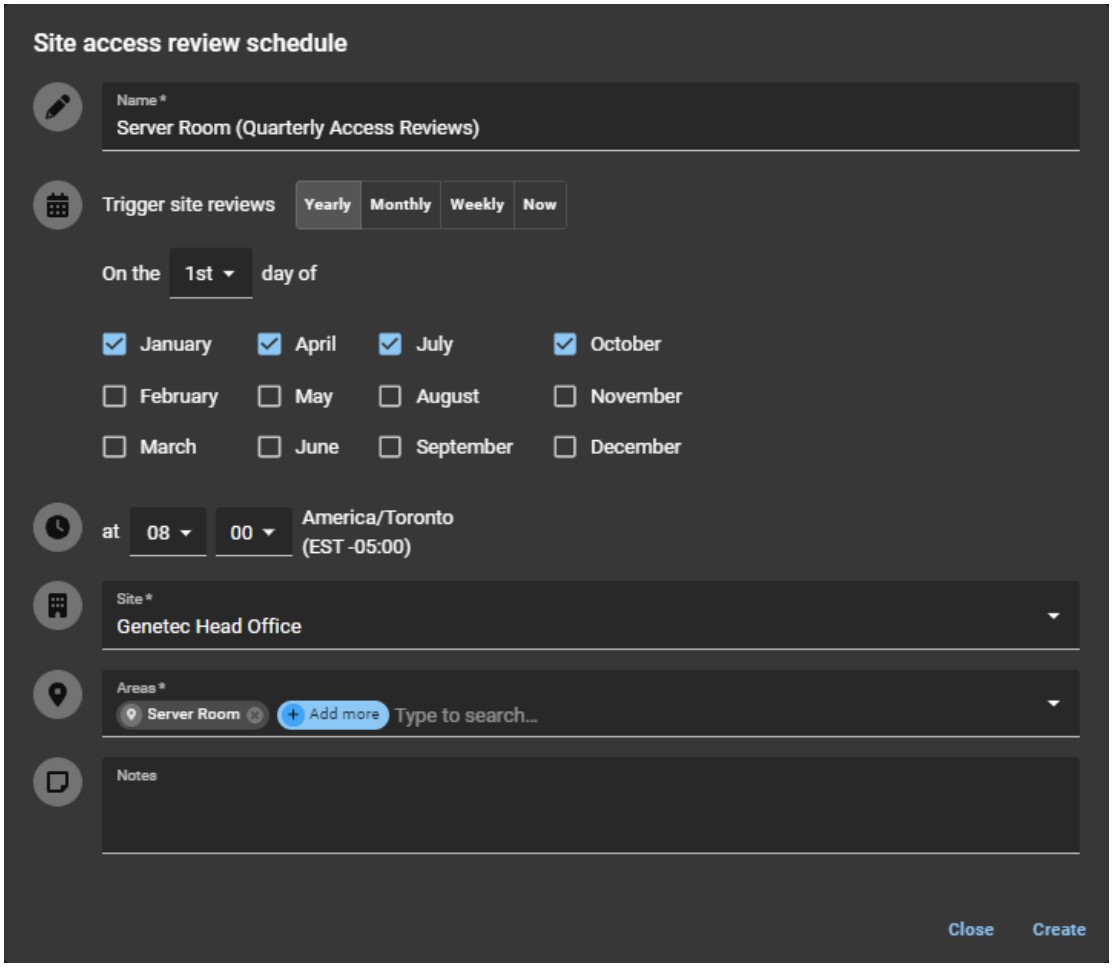


Figure 4: Server room (quarterly access reviews)

Example: The following example shows a site access review for a *data center* area scheduled to occur **Monthly**, on the first day of every month at 08:00.

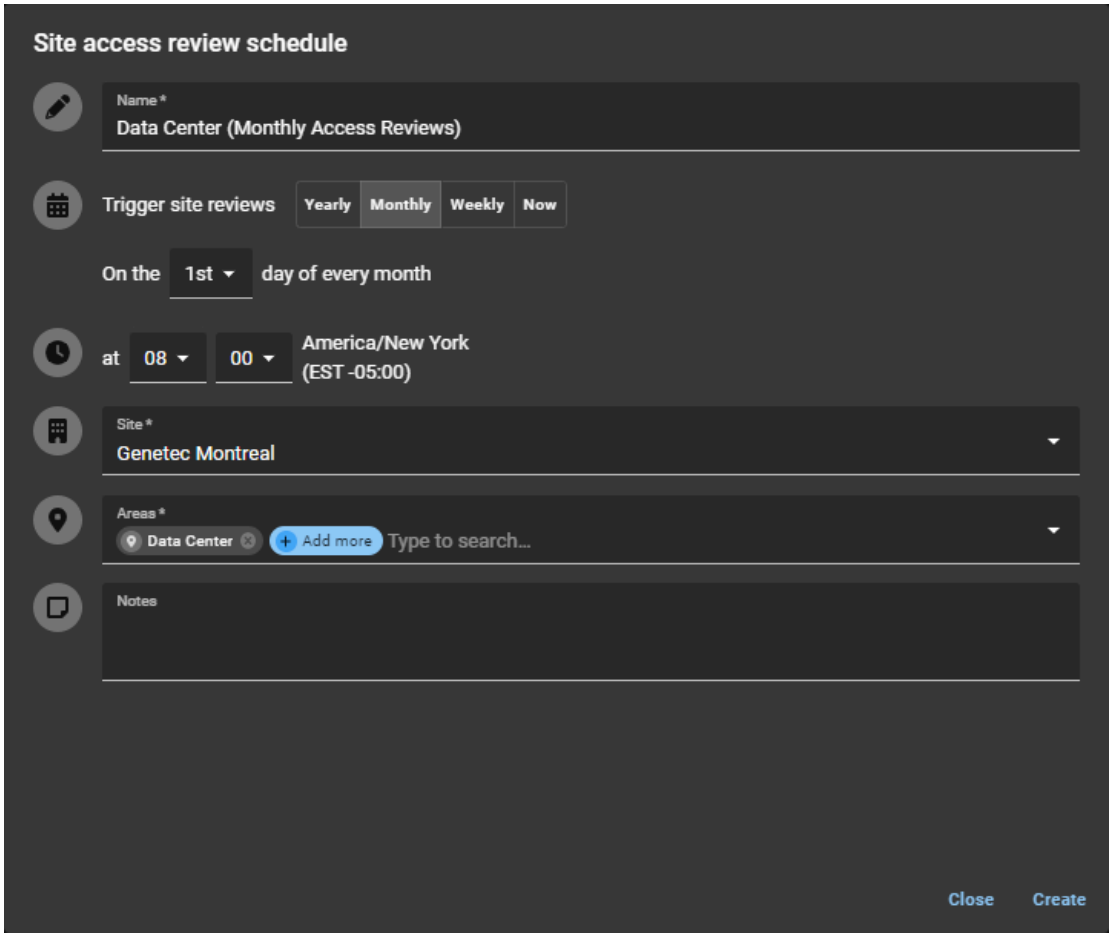


Figure 5: Data center (monthly access reviews)

Example: The following example shows a site access review for a *data center* and *server room* area scheduled to occur **Now**.

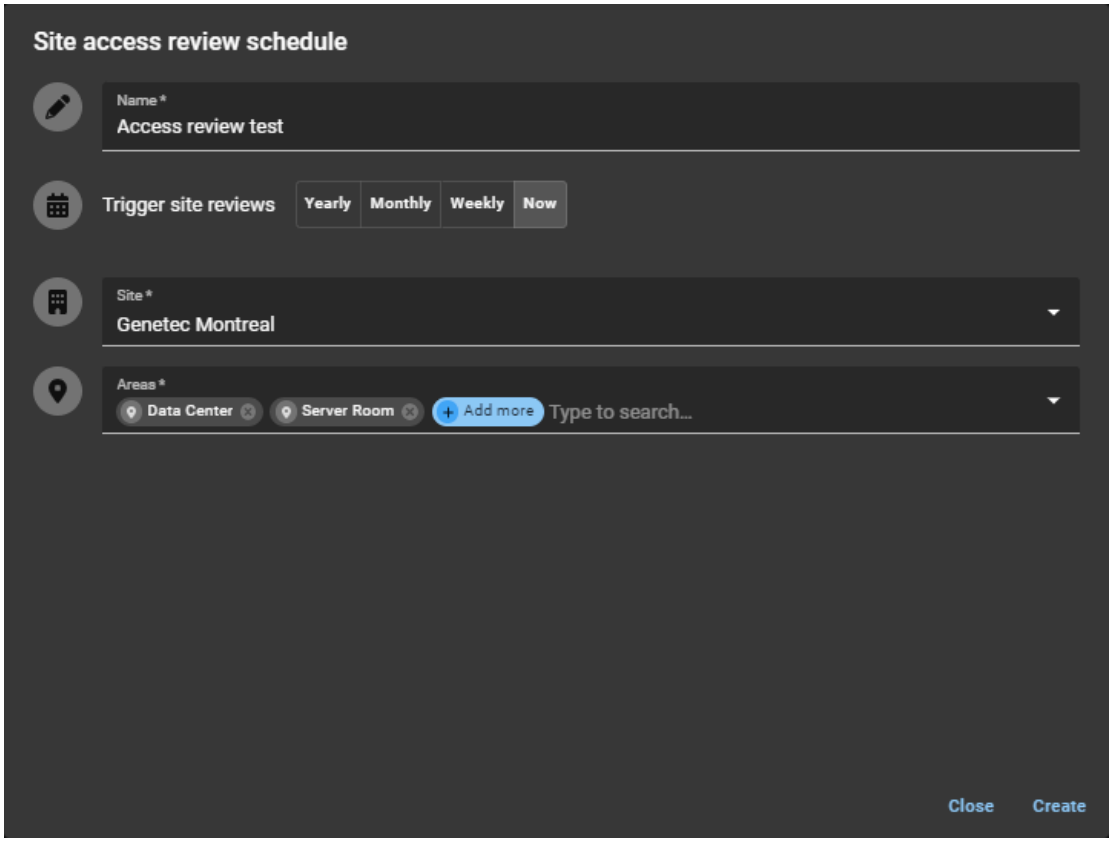
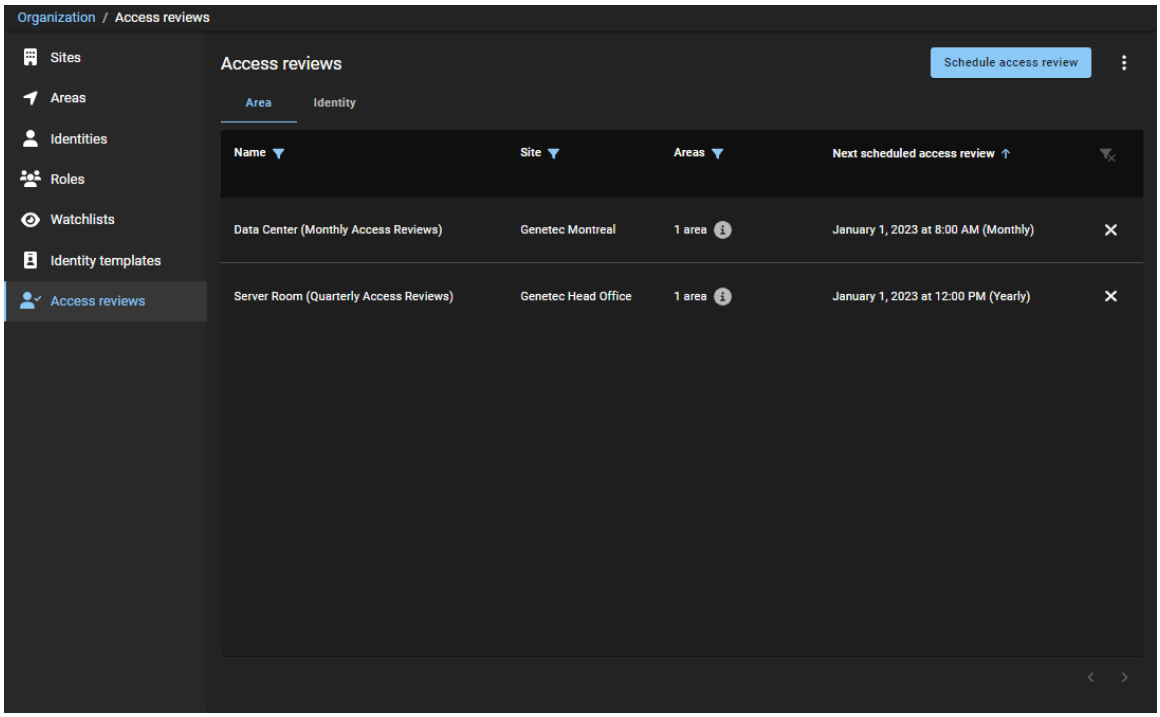


Figure 6: Data center and server room (manual access review scheduled now)

NOTE: Access reviews that are configured with a schedule of **Now** are not displayed on the scheduled *Access reviews* page. Instead, they are immediately displayed in the **My tasks** view of the relevant reviewers.

5 Click **Create**.
The scheduled access reviews are displayed in the *Access reviews* page.



6 (Optional) Click an area access review in the list to see the schedule details.
a) Click **Go to access reviews report** to display all access reviews.

Your site area access reviews have now been scheduled.

Example

After you finish

Do one or more of the following to complete your access reviews when required:

- Complete an area or role access review (site owner)
- Complete an area or role access review (area owner)

Setting up identity access reviews

To ensure security compliance and audit readiness, you can set up identity access reviews to occur at scheduled intervals.

Before you begin

- Make sure that the supervisor has direct report identities defined.

What you should know

- Only an account administrator can set up identity access reviews.

BEST PRACTICE: Schedule your identity access reviews so that they are automatically triggered before corporate audits or site safety checks to ensure your security compliance and audit readiness.

Procedure

- In the Genetec ClearID™ web portal, do the following:
  - Schedule your identity access reviews

Your access reviews have now been set up.

After you finish

Complete an identity access review (supervisor)

Scheduling identity access reviews

To ensure security compliance and audit readiness, you can set up identity access reviews to occur at scheduled intervals. These identity access reviews are performed based on a list of selected roles.

Before you begin

- Make sure that the roles to be reviewed have already been defined.
- Make sure that all the required identities have been associated with the correct roles.

What you should know

- Only an account administrator can schedule identity access reviews.
- For Identity access reviews, only **Yearly** schedules are supported.
- You can schedule up to five identity access reviews at a time, and each review can include a maximum of 20 roles.

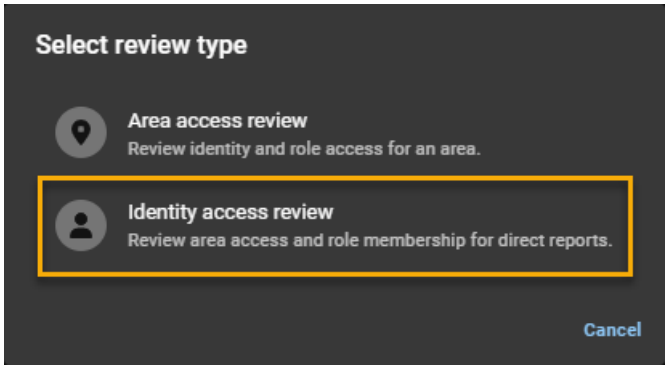
BEST PRACTICE: Schedule your identity access reviews so that they are automatically triggered before corporate audits or site safety checks to ensure your security compliance and audit readiness.

Procedure

1 From the homepage, click **Organization** > **Access reviews**.

2 Click **Schedule access review**.

3 In the **Select review type** dialog, select **Identity access review**.



4 In the *Identity access review schedule* dialog, select the options that you require.

a) Enter a Name for your identity access review.

For example, You might enter `Contractor access review` for electricians or `Data center identity access review` for your direct reports that need access to a data center.

b) Select the **Trigger identity reviews** options that you require.

- Select the day and month that you want the identity access review scheduled.
- Select the time that you want the identity access review scheduled.

NOTE: The time shown in the *Identity access review schedules* dialog options and all scheduled review times use the UTC time zone.

c) Select the **Roles** that you want to include in your Identity access review.

Identity access reviews will be generated for all identities in that role (active and inactive status). Inactive identities are clearly identified in the review.

d) (Optional) If you selected **Yearly**, in the **Notes** field, you can add more details as needed.

The **Notes** field is used to enter more detailed information about the identity access review. This field is typically used when a supervisor performs security reviews. For example, an ISO 27001 review or a SOC 1 or SOC 2 audit report.

Example: The following example shows an identity access review for *Electrical contractors* role scheduled to occur **Yearly**, on the first day of January at 12:00.

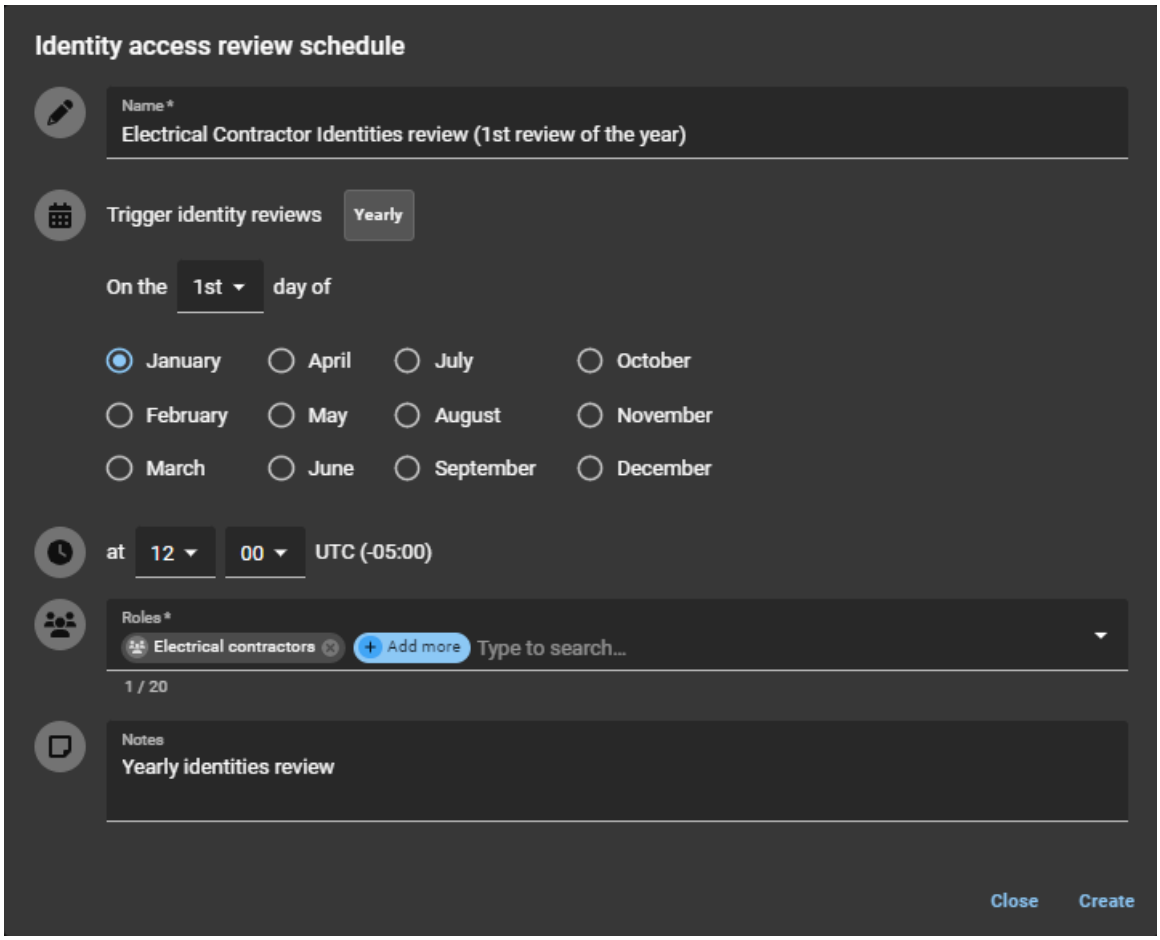


Figure 7: Identity access review (yearly access reviews)

5 Click **Create**.

6 (Optional) Click an identity access review in the list to see the schedule details.

a) Click **Go to access reviews report** to display all access reviews.

Your identity access reviews have now been scheduled.

Example

After you finish

Do the following to complete your access reviews when required:

- Complete an identity access review (supervisor)

Modifying access reviews

After you have set up and scheduled your area or identity access reviews, you can modify or delete them if required.

Before you begin

- Scheduling area access reviews on page 277
- Scheduling identity access reviews on page 283

What you should know

- Only a site owner can modify area access reviews.
- Only an account administrator can modify identity access reviews.

Procedure

1. If you need to make any changes or delete an identity access review schedule, click **Organization** > **Access reviews**.
2. To modify an area access review schedule, click the **Area** tab.
3. To modify an identity access review schedule, click the **Identity** tab.
4. Click a review in the list and make any changes that you require then click **Save**.
5. (Optional) To delete an access review, click  next to the review you want to delete then click **Remove** to confirm the deletion.

About access reviews report

In Genetec ClearID™, an access reviews report is a list of access reviews. The report includes information about area, role, or identity access reviews and the current review status (not started, started, in progress, completed, or expired).

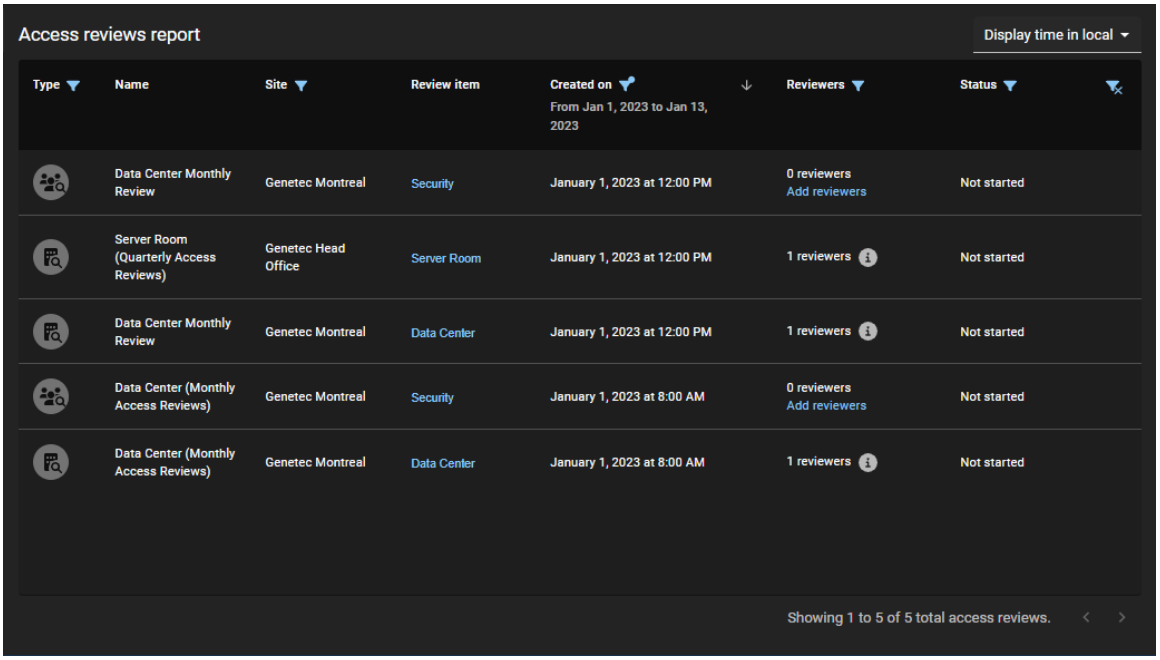


Figure 8: Access reviews report

The access reviews report is used for the following:

- Site owners: To check the status of site access reviews for areas or roles.
- Supervisors: To check the status of identity access reviews (for their direct reports).
- Audits: To provide information to auditors.

Column filters can be used to help refine the report search results by review type, site, created on, reviewers, and status.

For example, you could filter for completed reviews, then select a review and choose **Print** (hardcopy) or **Print** > **Destination** > **Save as PDF** (softcopy). The hardcopy or softcopy can then be shared with auditors or other members of your organization.

Who can see what?

- Area managers or role managers only see the filters that are relevant to area or role reviews.
- Supervisors only see their direct reports.
- Administrators see everything.

Related Topics

Checking the status of access reviews on page 289

Checking the status of access reviews

A site owner is responsible for checking the status of access reviews to ensure that the organization is security-compliant, audit ready, and that the review processes occurs on time. A supervisor can also check the status of identity access reviews for their direct reports.

Before you begin

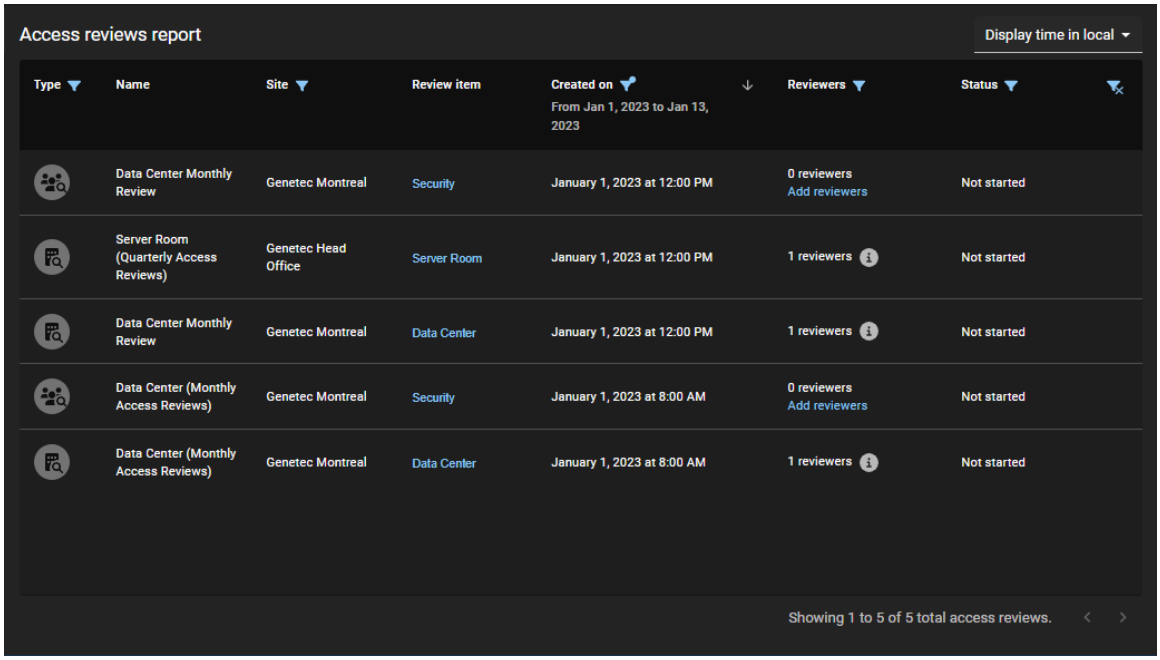
Set up your access reviews.

What you should know

- Only a site owner can view the complete **Access reviews report** to check the status or progress of an area or role access review for their site.
- An area manager or role manager only sees their reviews in a **My access reviews** version of the report.
- A site owner who is not an area owner or manager, or a role owner or manager does not see any access reviews in **Dashboard** > **My tasks**.
- Filters: When no types, sites, or reviewers are selected, all results are displayed in the report.

Procedure

1 From the *Dashboard*, click **Reports** > **Access reviews**.

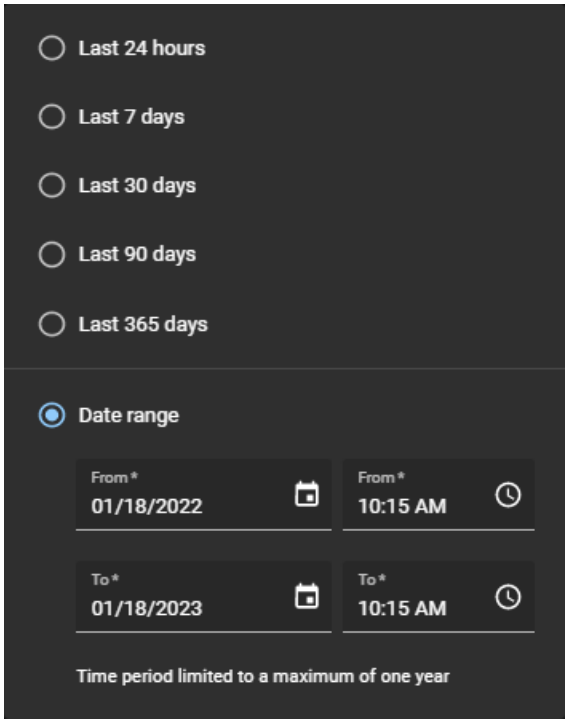


TIP: If any review shows `0 reviewers` in the **Reviewers** column, you can click the **Add reviewers** hyperlink to add them immediately. This situation typically occurs when there are no owners or managers defined.

2 In the *Access reviews report* page, select the display time that you require from the following options:

- **Display time in local:** Show report times using the local system time from the computer of the logged-in user.
- **Display time in UTC:** Show report times using Coordinated Universal Time (UTC).

3 In the **Created on** column, select one of the options, or click **Date range** and specify a date and time range to display a list of access reviews.



4 (Optional) If the list is long, configure additional report column filters to narrow report results as required.

a) In the **Type** column, select one or more review types as required:

- **Area access review:** Displays area access reviews.
- **Role access review:** Displays role access reviews.
- **Identity access review:** Displays identity access reviews.

b) In the **Site** column, enter a search string or select one or more sites from the list.

c) In the **Reviewers** column, enter an access reviewer's name or email to show reviews that they are associated with.

d) In the **Status** column, select the status options that you want to display when checking the access review.

NOTE: The status of incomplete access reviews are automatically updated to the **Expired** state when the incomplete access review is replaced by a newer scheduled review with the same name or when the **Enforce an expiration for access reviews** option is active and the expiration period has been exceeded.

e) (Optional) Click to reset filter selections.

5 In the **Review item** column, click a hyperlink to check the details of the access review or to complete the review.

6 (Optional) You can see the list of reviewers by clicking the info icon ( ) next to **reviewers**.

7 (Optional) If you selected an area access review, click hyperlinks in the **Review item** column to display additional information about the access review.

8 (Optional) If you selected an access review, click **Continue review** to complete the access review now.

Example

Watch this video to learn more. Click the **Captions** icon (**CC**) to turn on video captions in one of the available languages.

After you finish

Do one or more of the following to complete your access reviews when required:

- Complete an area access review (site owner)
- Complete an area access review (area owner)
- Complete an identity access review (supervisor)

Related Topics

About access reviews report on page 288

Completing an area access review (site owner)

To ensure security compliance or audit readiness you can perform access reviews to check who has access to an area or role. These periodic reviews are completed by a site owner.

Before you begin

Set up your site access reviews.

What you should know

- No changes can be made to an access review after it has been completed.
- All **Completed** reviews are retained for audit and tracking purposes.

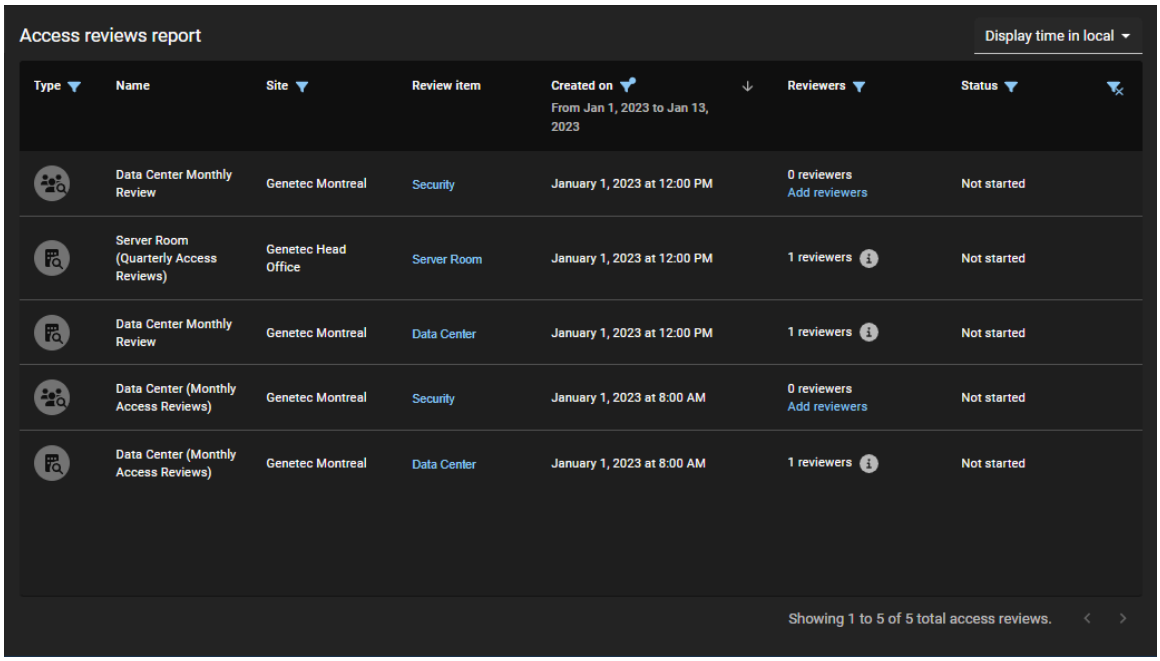
Procedure

To complete an area access review:

1 From the *Home* page, click **Reports** > **Access reviews**.

2 (Optional) Configure report column filters as required.

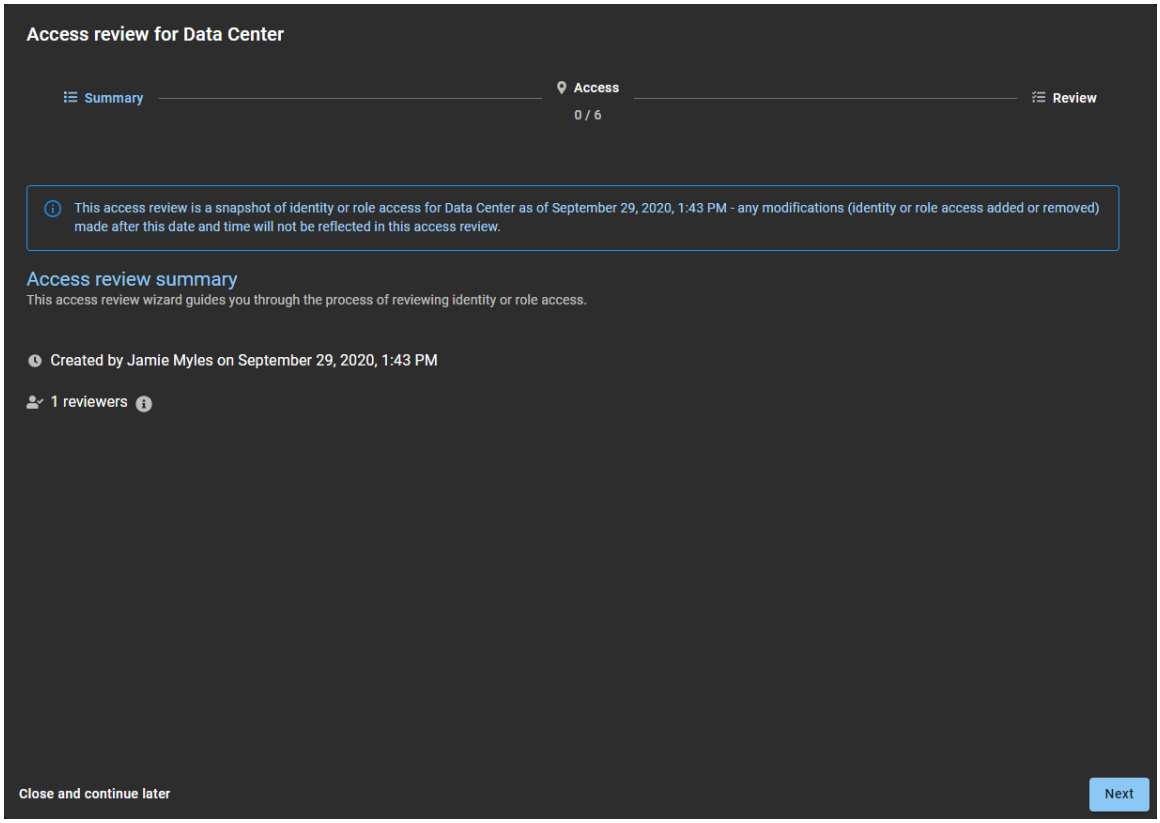
3 In the *Access reviews report* section, select the area access review that you require.



a) Click an area hyperlink in the **Review item** column to begin the access review.

b) Click **Continue review**.

4 In the **Details** section of the area access review, check the summary details.

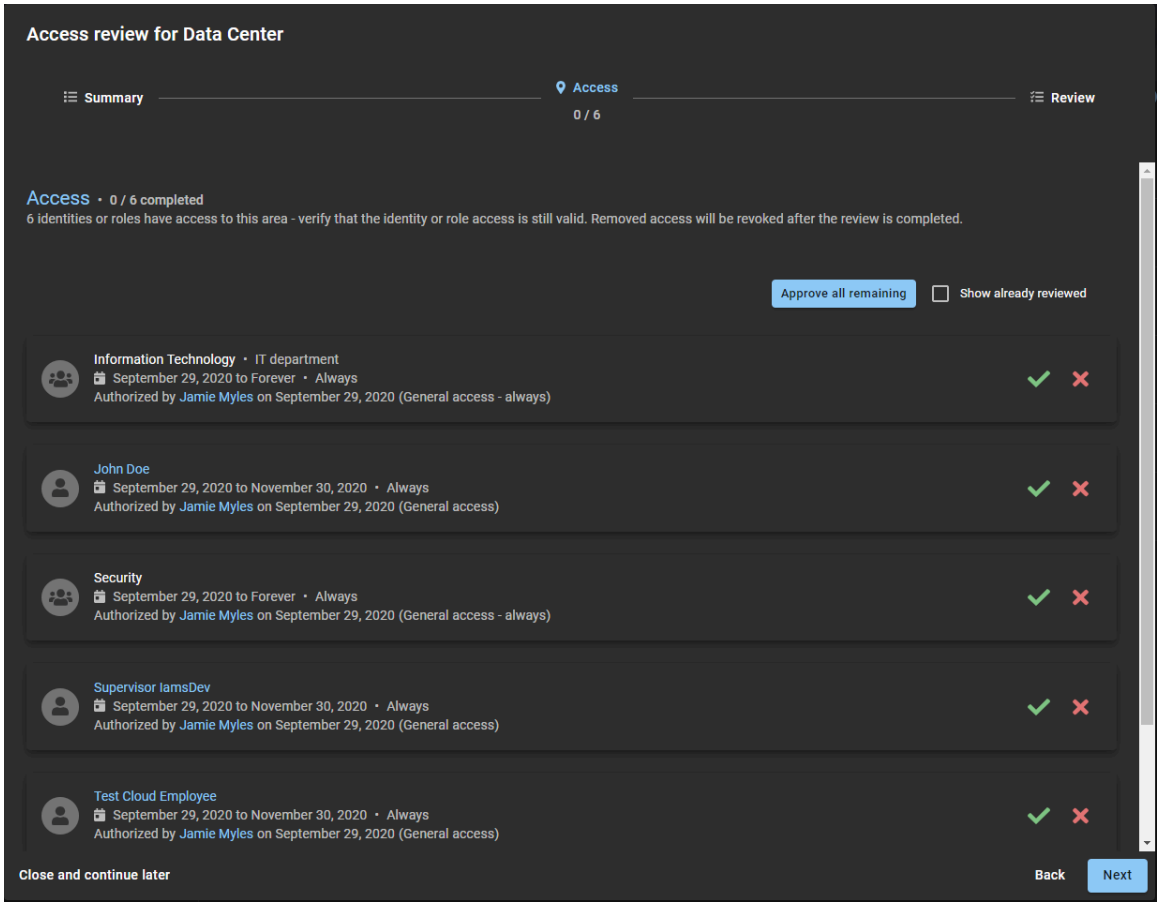


a) Click to see the reviewer details.

b) (Optional) Click **Close and continue later** to pause the review for a later time.

c) Click **Next** to continue to the next section of the access review wizard.

5 In the **Access** section of the access review, review the access.



a) Click **Keep access** ( ) to confirm that access is still valid.

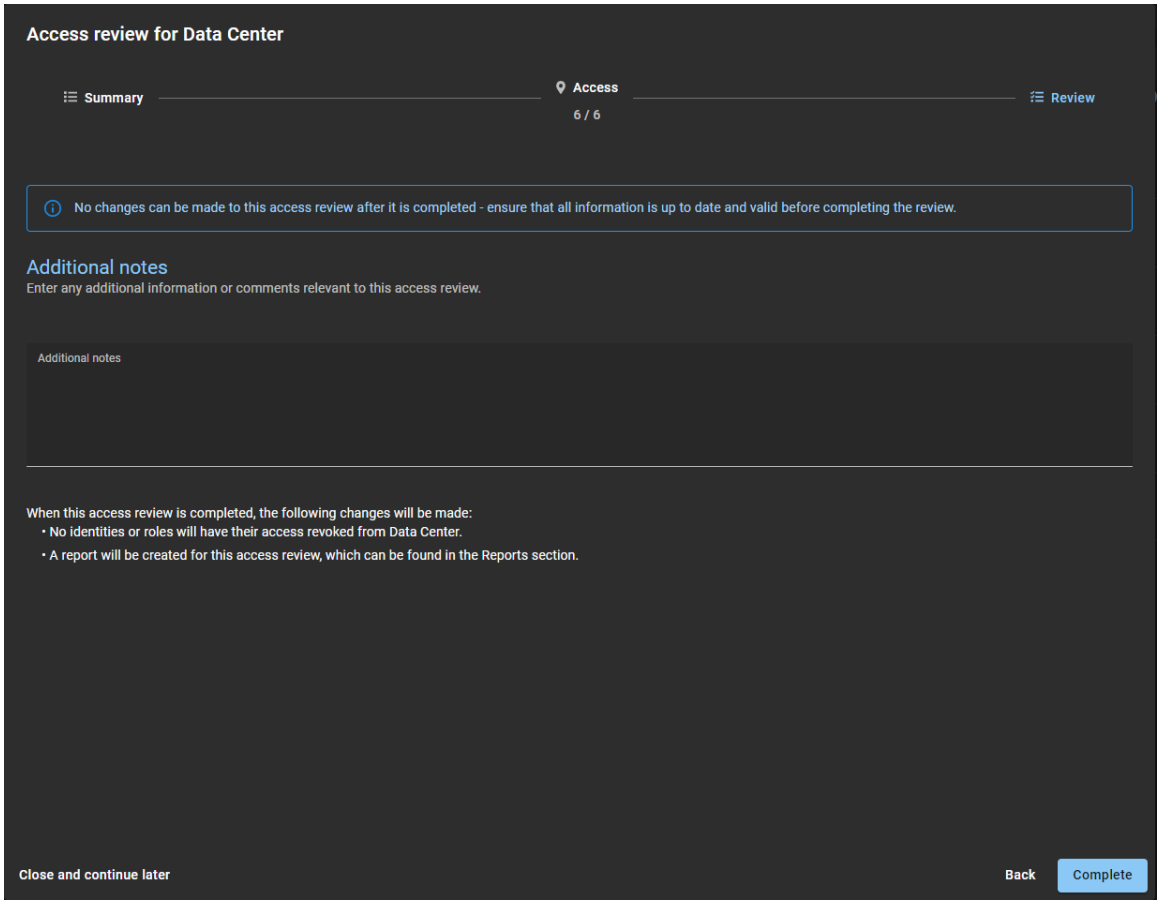
TIP: Use **Approve all remaining** to speed up approval process when the list is long, then remove any access that is no longer required.

b) Click **Remove access** ( ) to remove access that is no longer required.

c) (Optional) Select **Show already reviewed** to go back and make modifications.

d) Click **Next** to continue to the next section of the access review wizard.

6 In the *Review* section of the access review, verify that the review details are correct.



a) In the **Additional notes** section, add any notes that you require.

b) Before you click **Complete**, review the changes summary immediately after the **Additional notes** section.

The changes summary displays information about any identity or role changes that will occur when you click **Complete**.

c) (Optional) If any of the information looks incorrect, click **Back** to return to previous sections and modify your changes.

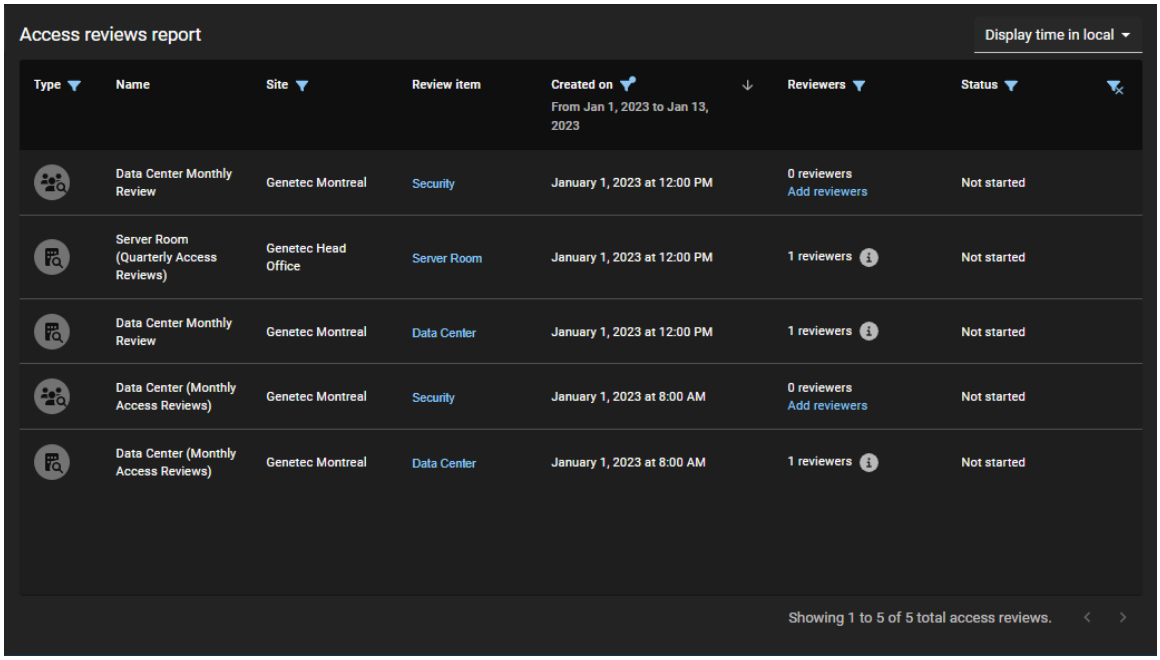
d) If the **Review** section details are correct, click **Complete**.

To complete a role access review:

1 From the *Home* page, click **Reports** > **Access reviews**.

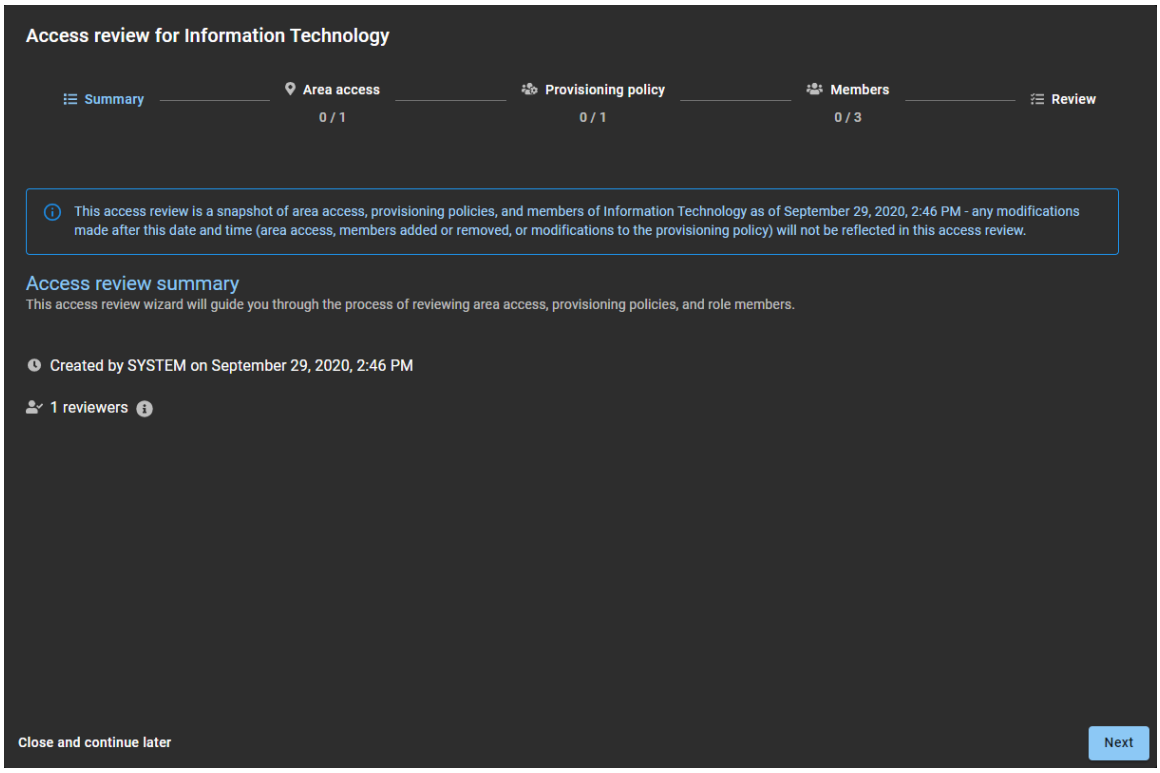
2 (Optional) Configure report column filters as required.

3 In the *Access reviews report* section, select the role access review that you require.



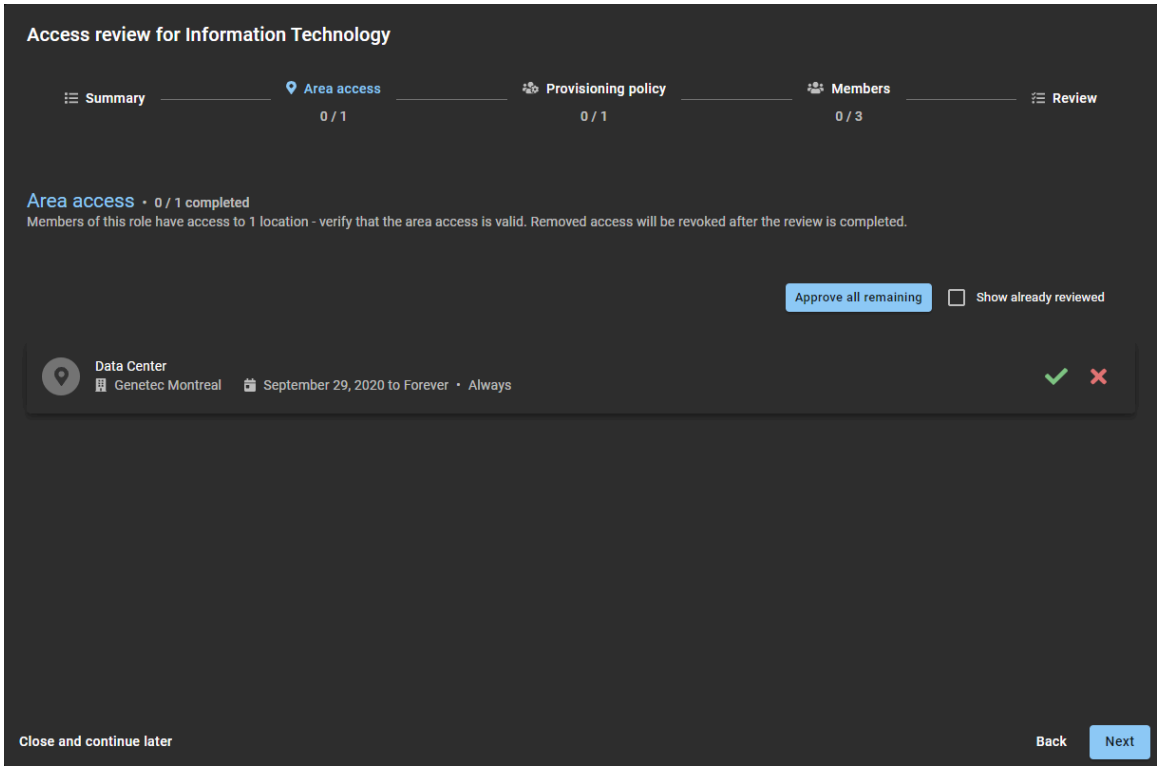
a) Click a role hyperlink in the **Review item** column to begin the access review.
b) Click **Continue review**.

4 In the **Details** section of the role access review, review the summary details.



a) Click to see the reviewer details.
b) (Optional) Click **Close and continue later** to pause the review for a later time.
c) Click **Next** to continue to the next section of the access review wizard.

5 In the **Area access** section of the role access review, review the access.



a) Click **Keep access** ( ) to confirm that access is still valid.

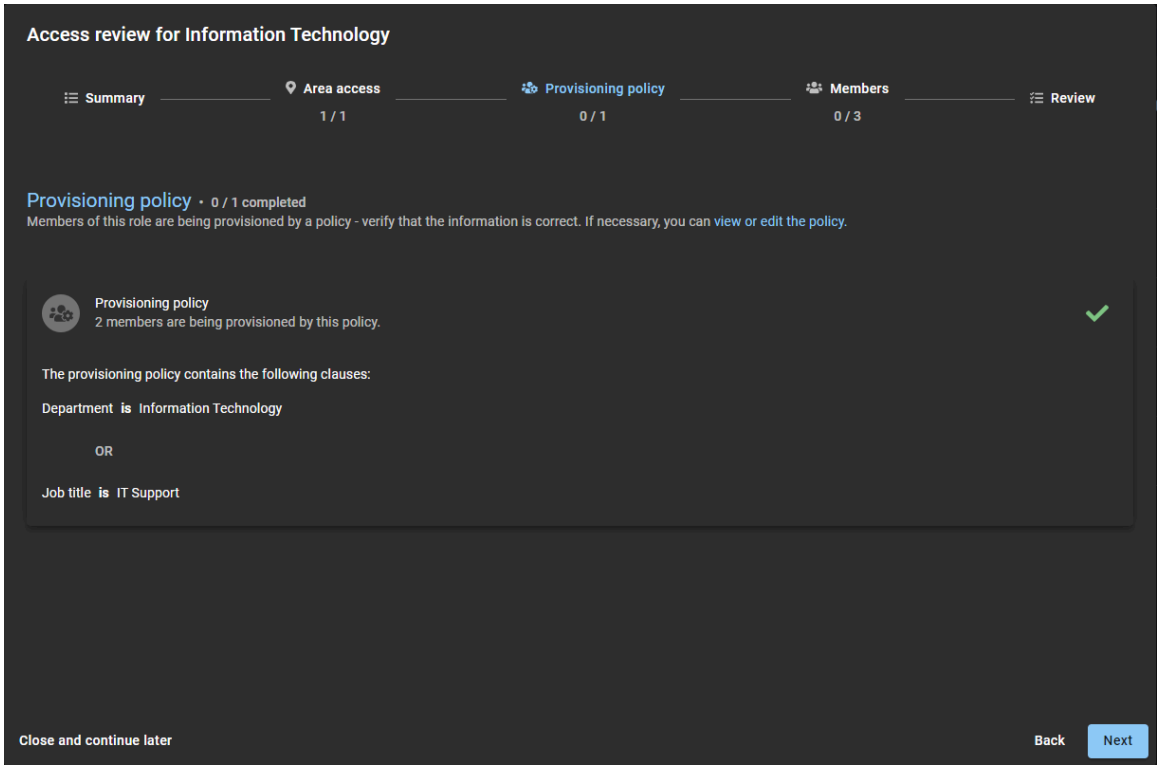
TIP: Use **Approve all remaining** to speed up approval process when the list is long, then remove any access that is no longer required.

b) Click **Remove access** ( ) to remove access that is no longer required.

c) (Optional) Select **Show already reviewed** to go back and make modifications.

d) Click **Next** to continue to the next section of the access review wizard.

6 In the **Provisioning policy** section of the role access review, confirm that the policies are still valid.

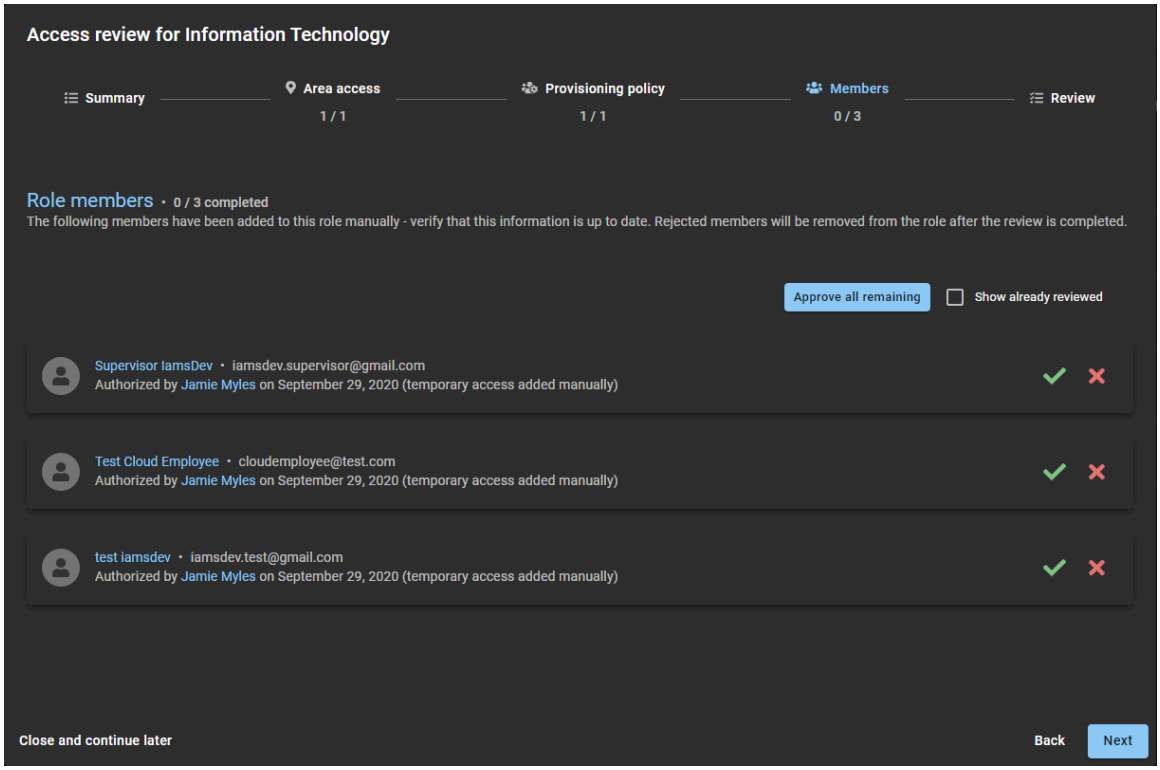


a) (Optional) Click **view or edit the policy** to open the *Provisioning policy* page to view or make changes to the policy.

b) Click **Approve policy** ( ) to confirm that policy is still valid.

c) Click **Next** to continue to the next section of the access review wizard.

7 In the **Members** section of the role access review, confirm that the members are still valid.



a) Click **Keep access** ( ) to confirm that access is still valid.

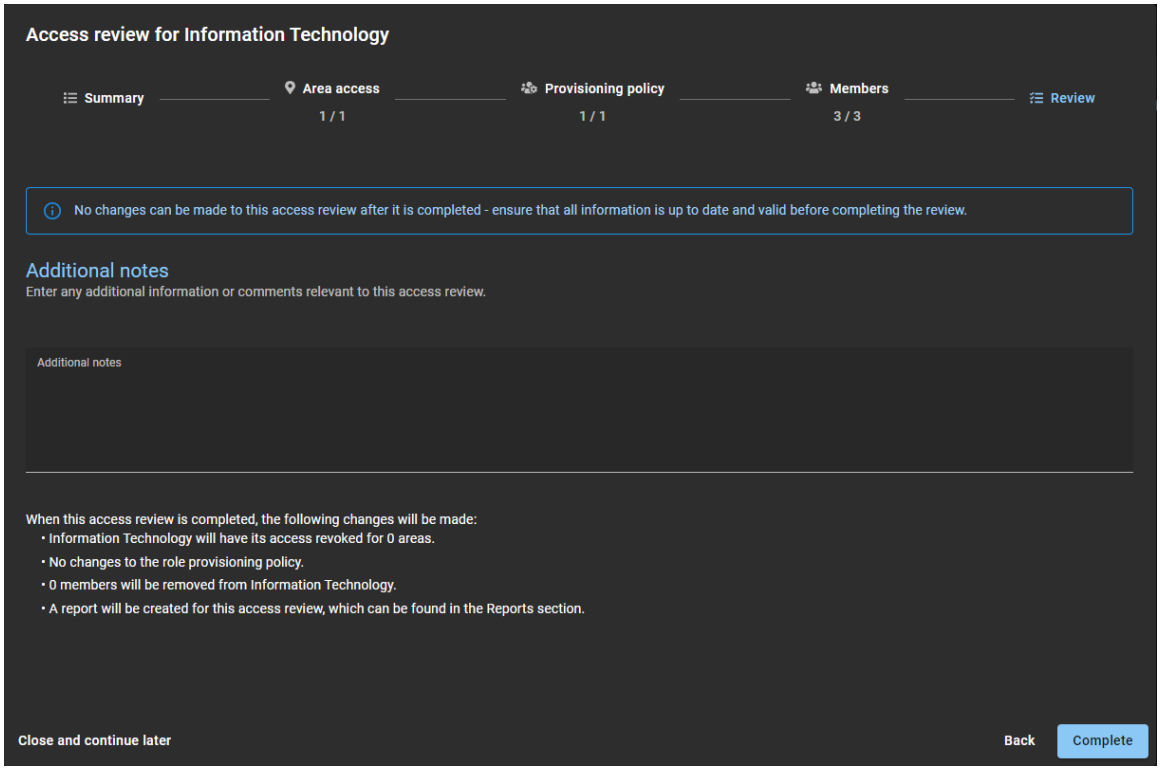
TIP: Use **Approve all remaining** to speed up approval process when the list is long, then remove any access that is no longer required.

b) Click **Remove access** ( ) to remove access that is no longer required.

c) (Optional) Select **Show already reviewed** to go back and make modifications.

d) Click **Next** to continue to the next section of the access review wizard.

8 In the **Review** section of the role access review, verify that the review details are correct.



a) In the **Additional notes** section, add any notes that you require.
b) Before you click **Complete**, review the changes summary immediately after the **Additional notes** section.
c) (Optional) If any of the information looks incorrect, click **Back** to return to previous sections and modify your changes.
d) If the **Review** section details are correct, click **Complete**.

Example

After you finish

Generate an access reviews report.

Related Topics

Reviewing area access on page 350
Access Reviews Feature Note (2 pages)

Completing an area access review (area manager or role manager)

To ensure security compliance or audit readiness, you can perform access reviews to check who has access to an area or role. These periodic reviews are completed by an area manager or role manager.

Before you begin

Check your mail for an *Access Review Pending* email notification or look on the *My tasks* page for a pending review.

What you should know

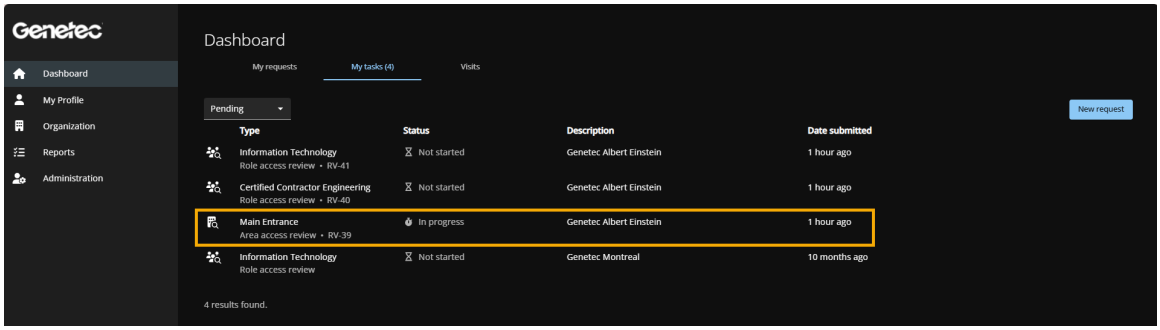
- Area managers or role managers can complete an access review from the **My tasks** page of the **Dashboard** or from an email notification.
- No changes can be made to an access review after it has been completed.
- All **Completed** reviews are retained for audit and tracking purposes.
-

Procedure

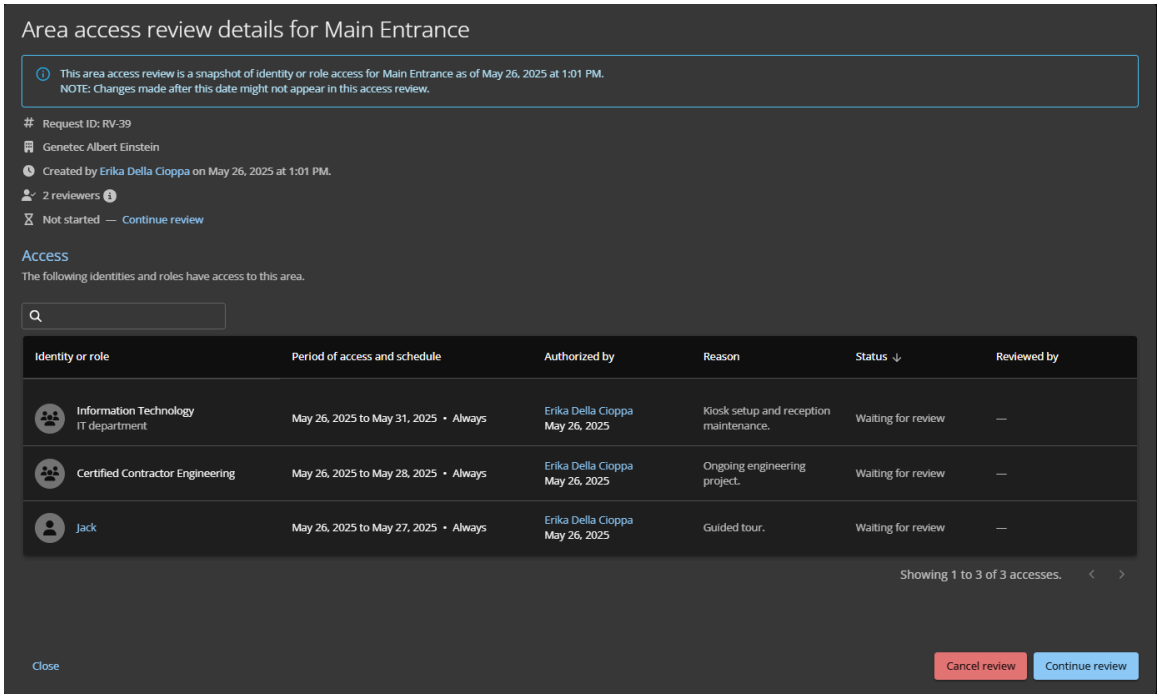
To complete an area access review from the Dashboard page:

1 Click **Dashboard** > **My tasks**.

2 In the **My tasks** list, click the area that you require.



3 In the **Details** section of the area access review, check the summary details.



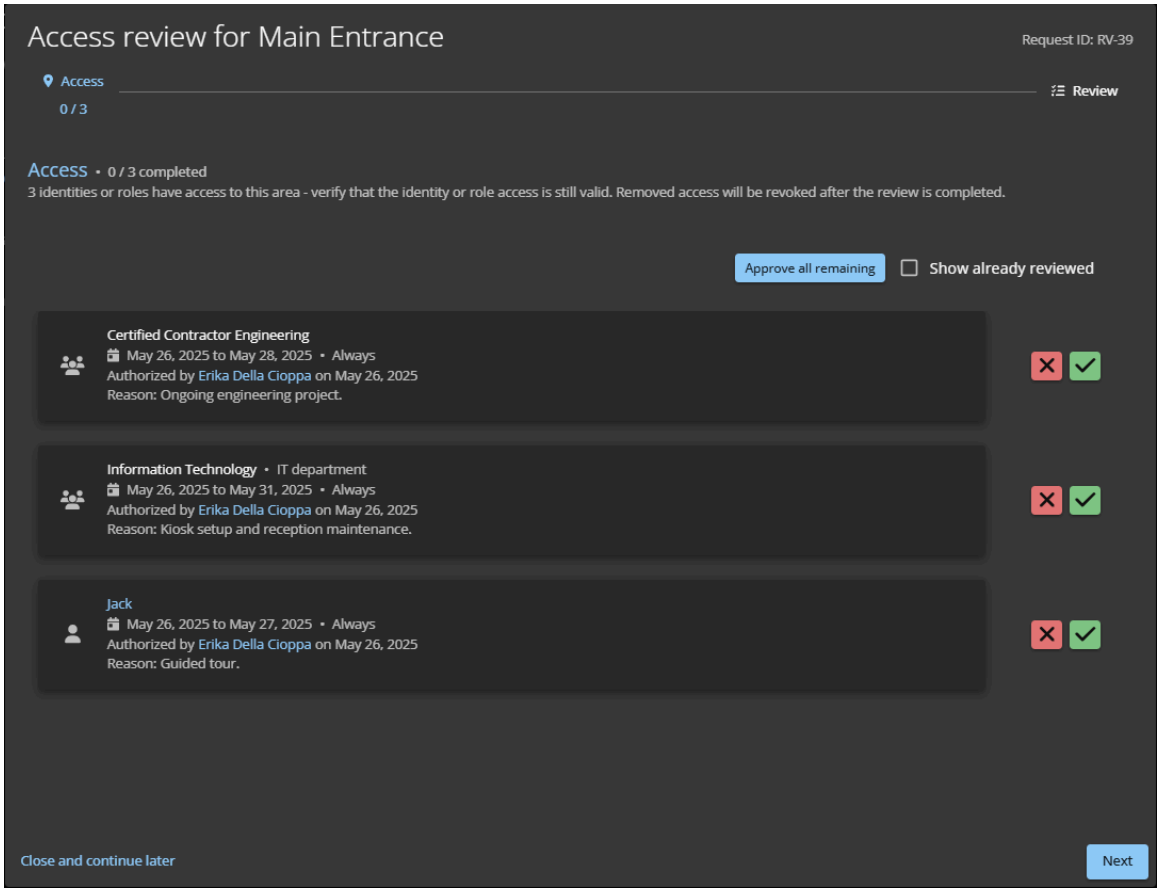
a) Click to see the reviewer details.

b) (Optional) Click **Close and continue later** to pause the review for a later time.

c) Click **Next** to continue to the next section of the access review wizard.

4 Click **Continue review**.

5 In the **Access** section of the access review, review the access.



a) Click **Keep access** ( ) to confirm that access is still valid.

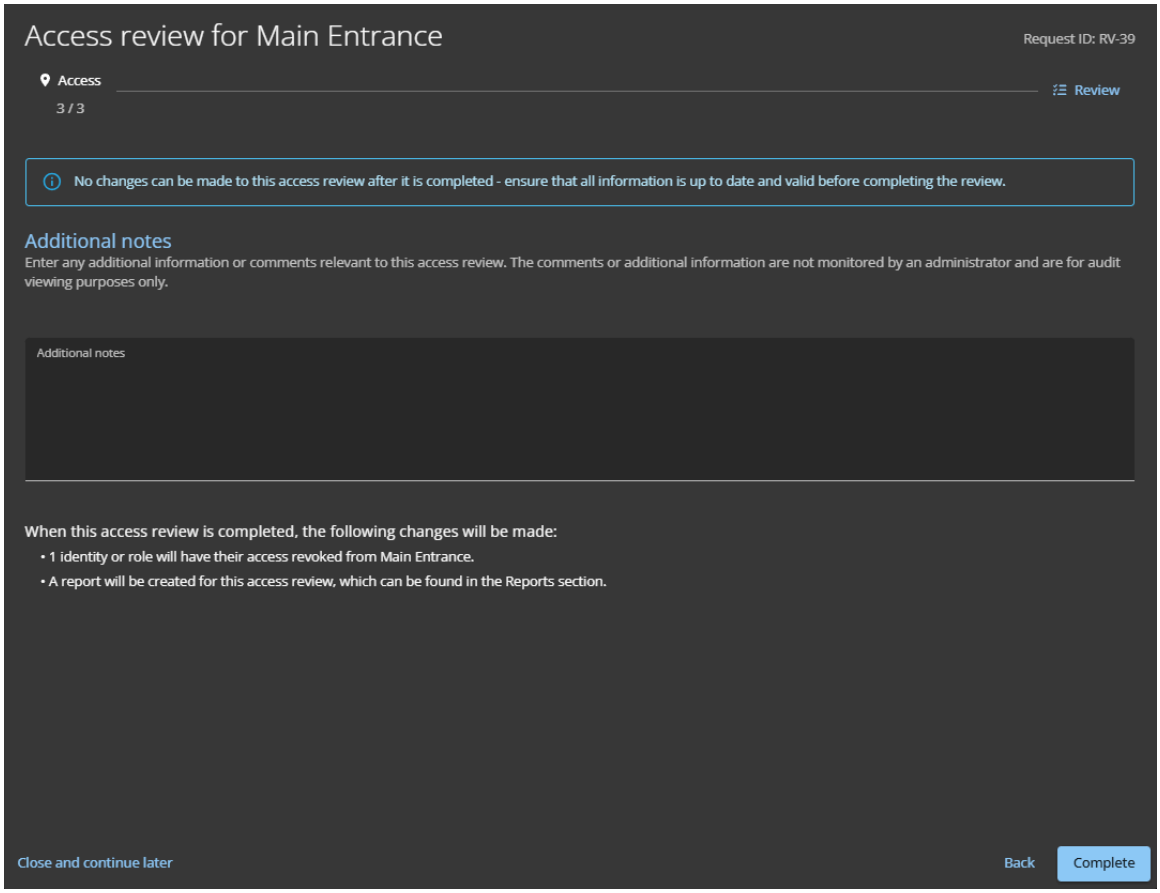
TIP: Use **Approve all remaining** to speed up approval process when the list is long, then remove any access that is no longer required.

b) Click **Remove access** ( ) to remove access that is no longer required.

c) (Optional) Select **Show already reviewed** to go back and make modifications.

d) Click **Next** to continue to the next section of the access review wizard.

6 In the *Review* section of the access review, verify that the review details are correct.



a) In the **Additional notes** section, add any notes that you require.

b) Before you click **Complete**, review the changes summary immediately after the **Additional notes** section.

The changes summary displays information about any identity or role changes that will occur when you click **Complete**.

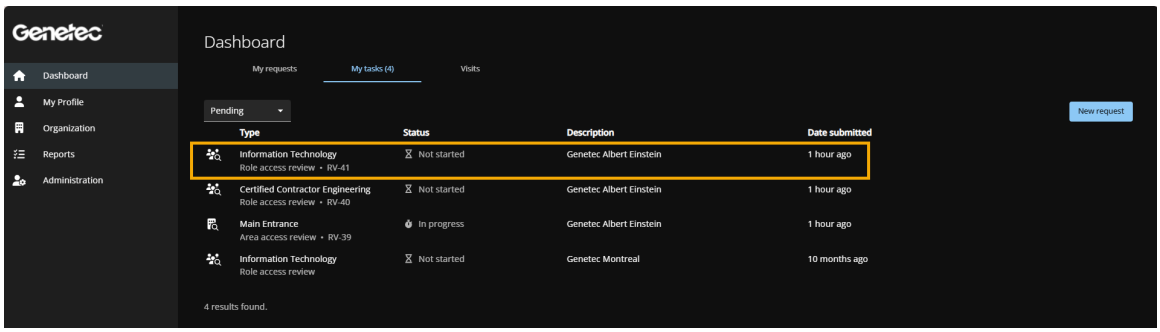
c) (Optional) If any of the information looks incorrect, click **Back** to return to previous sections and modify your changes.

d) If the **Review** section details are correct, click **Complete**.

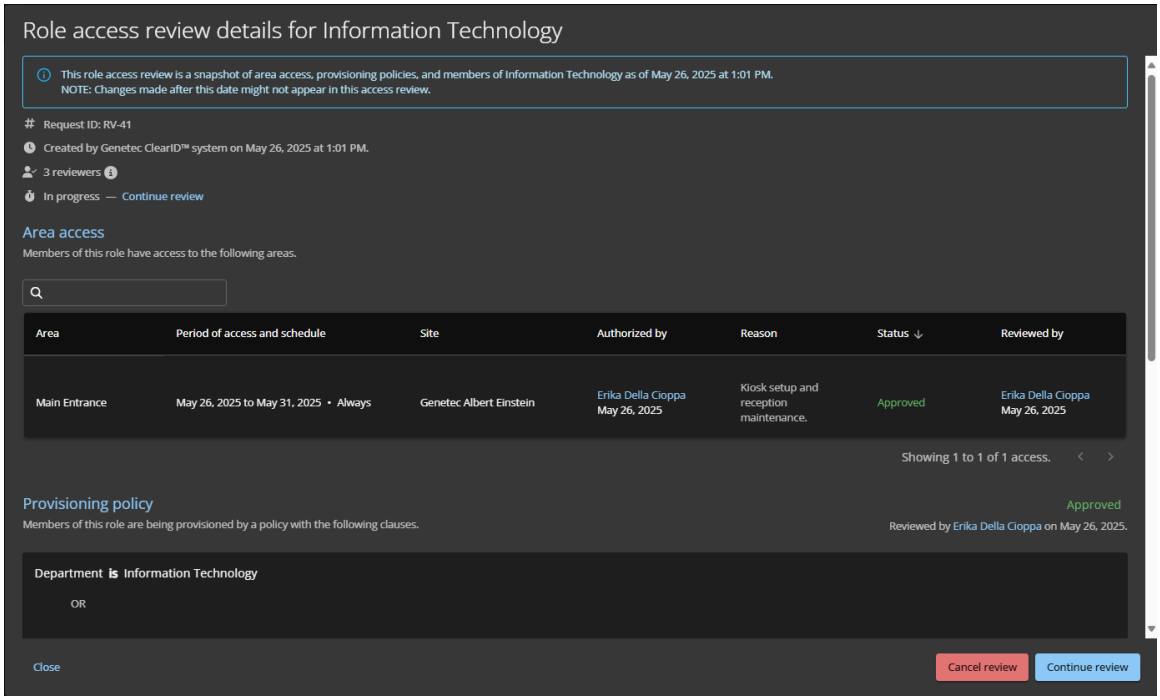
To complete a role access review from the Dashboard page:

1 Click **Dashboard** > **My tasks**.

2 In the **My tasks** list, click the role that you require.



3 In the **Details** section of the role access review, review the summary details.



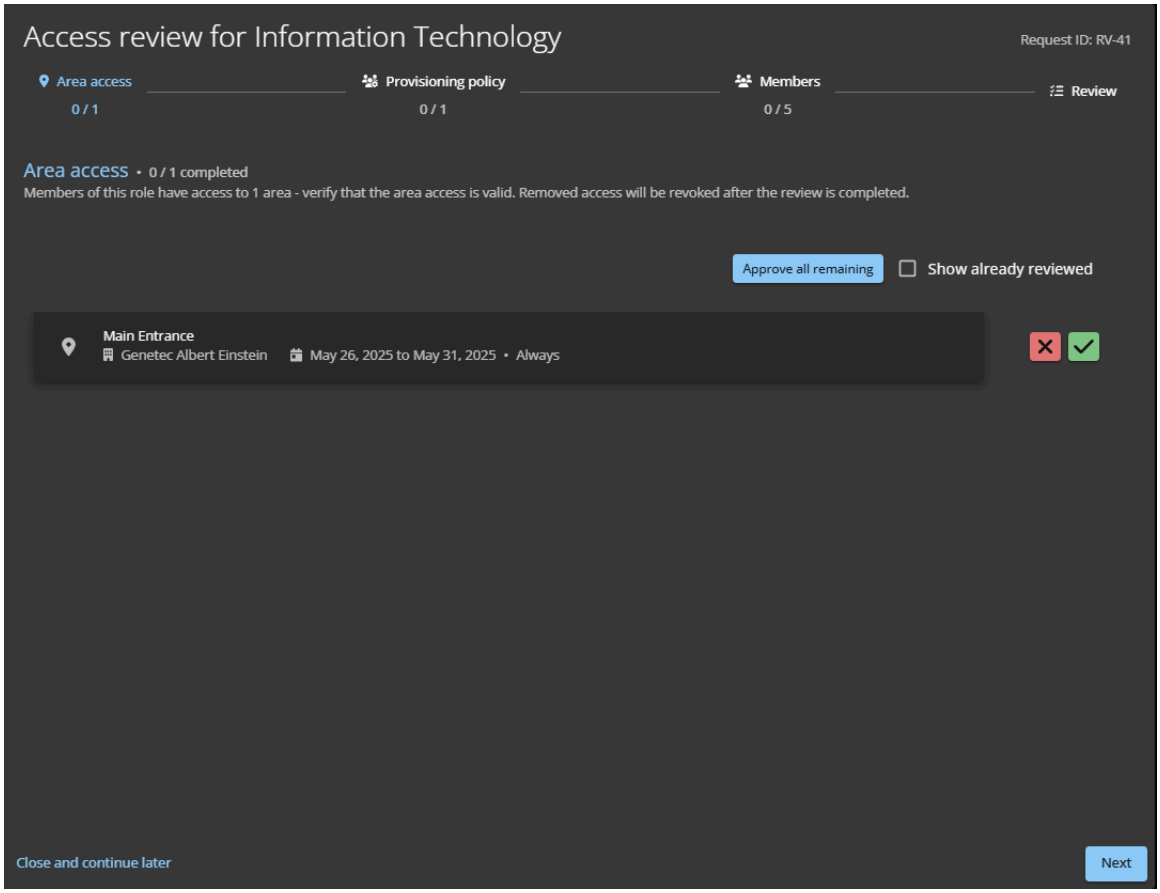
a) Click to see the reviewer details.

b) (Optional) Click **Close and continue later** to pause the review for a later time.

c) Click **Next** to continue to the next section of the access review wizard.

4 Click **Continue review**.

5 In the **Area access** section of the role access review, review the access.



a) Click **Keep access** ( ) to confirm that access is still valid.

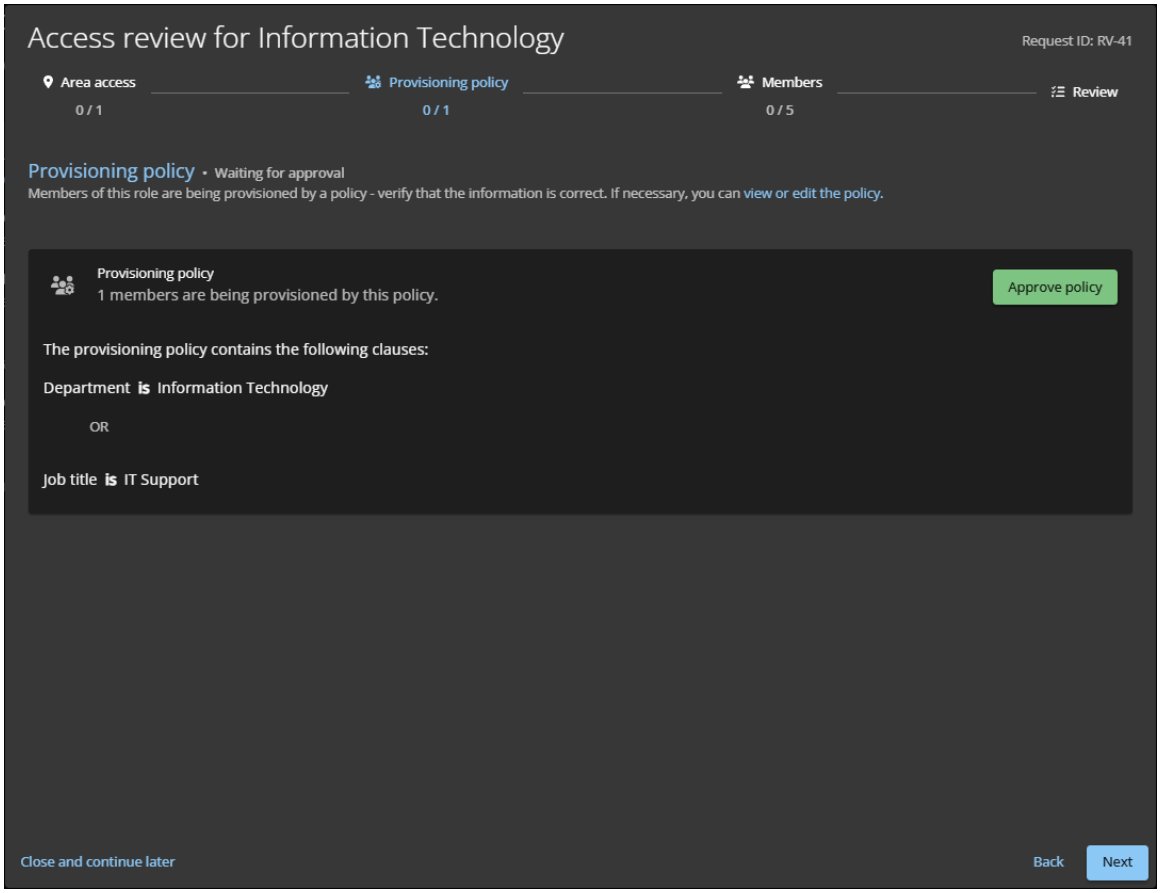
TIP: Use **Approve all remaining** to speed up approval process when the list is long, then remove any access that is no longer required.

b) Click **Remove access** ( ) to remove access that is no longer required.

c) (Optional) Select **Show already reviewed** to go back and make modifications.

d) Click **Next** to continue to the next section of the access review wizard.

6 In the **Provisioning policy** section of the role access review, confirm that the policies are still valid.

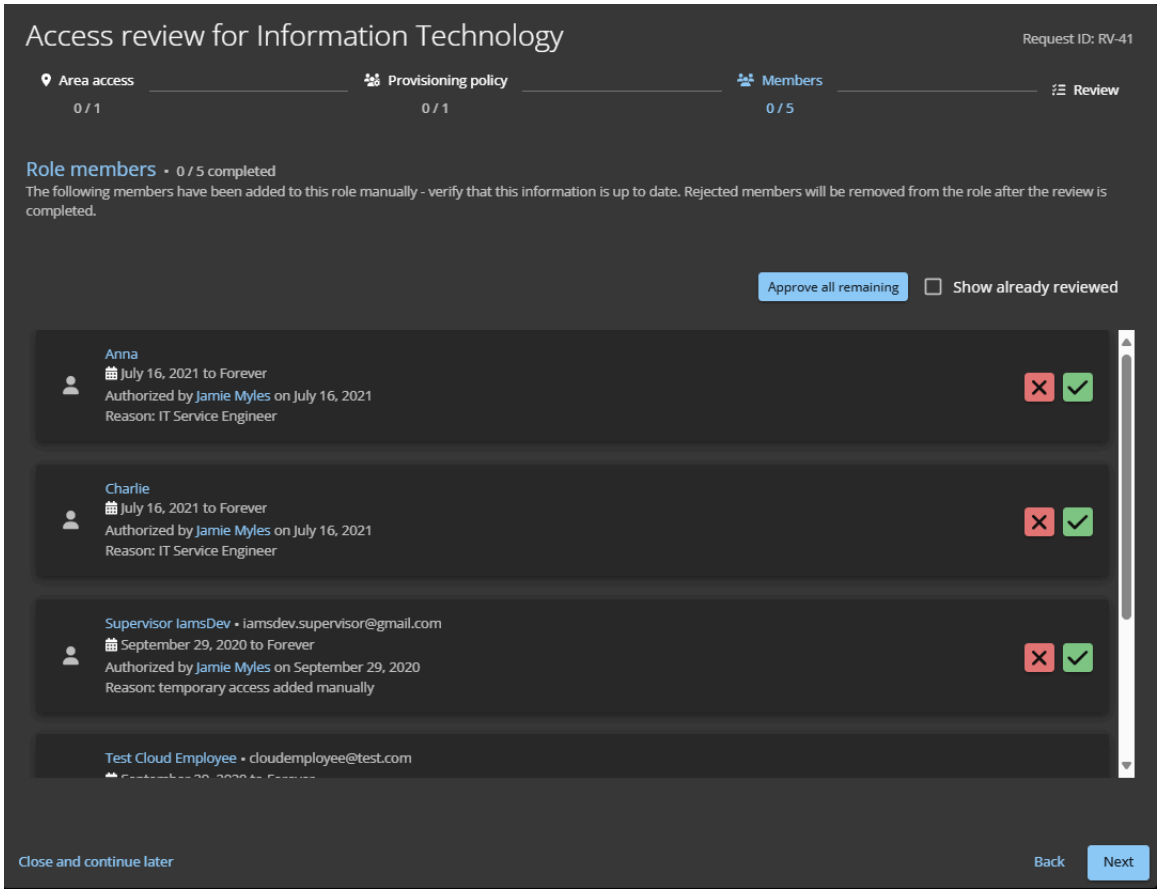


a) (Optional) Click **view or edit the policy** to open the *Provisioning policy* page to view or make changes to the policy.

b) Click **Approve policy** ( ) to confirm that policy is still valid.

c) Click **Next** to continue to the next section of the access review wizard.

7 In the **Members** section of the role access review, confirm that the members are still valid.



a) Click **Keep access** ( ) to confirm that access is still valid.

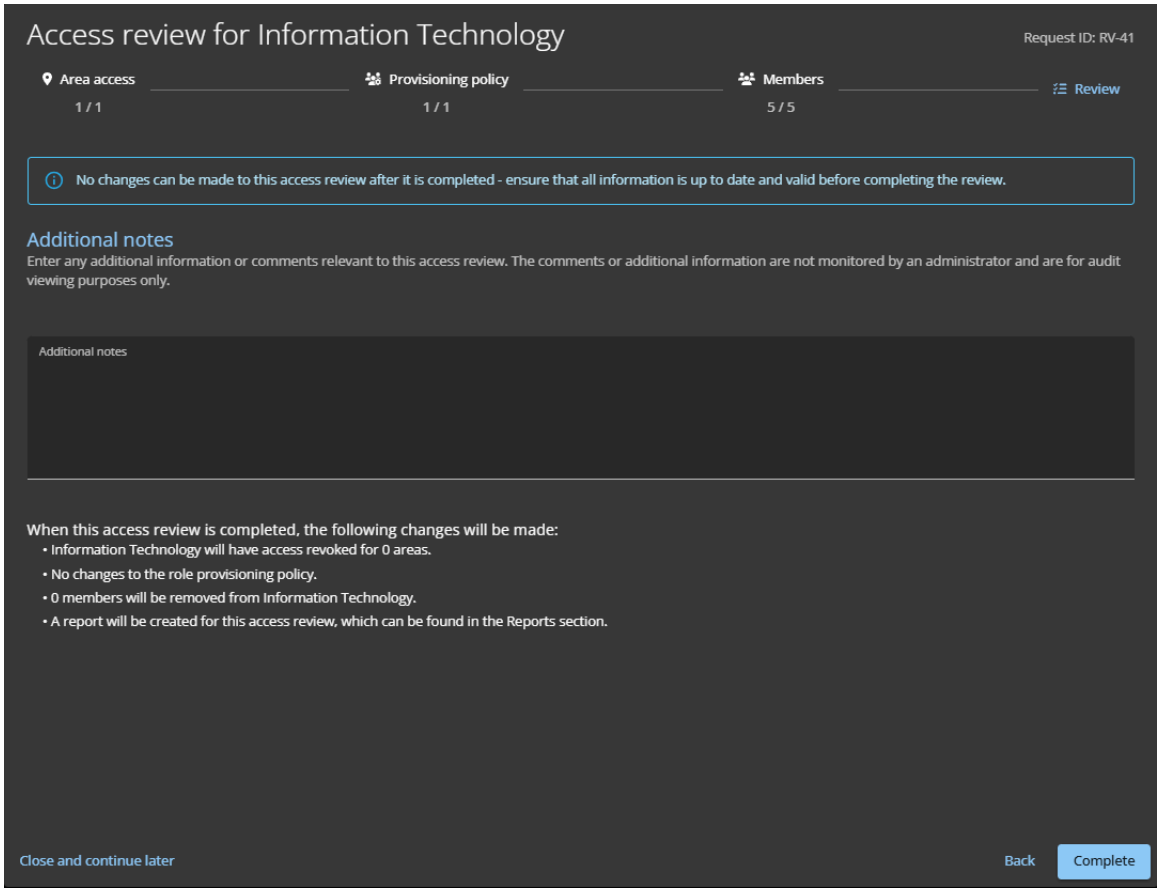
TIP: Use **Approve all remaining** to speed up approval process when the list is long, then remove any access that is no longer required.

b) Click **Remove access** ( ) to remove access that is no longer required.

c) (Optional) Select **Show already reviewed** to go back and make modifications.

d) Click **Next** to continue to the next section of the access review wizard.

8 In the **Review** section of the role access review, verify that the review details are correct.



a) In the **Additional notes** section, add any notes that you require.
b) Before you click **Complete**, review the changes summary immediately after the **Additional notes** section.
c) (Optional) If any of the information looks incorrect, click **Back** to return to previous sections and modify your changes.
d) If the **Review** section details are correct, click **Complete**.

After you finish

Generating an access review summary on page 316

Related Topics

Access Reviews Feature Note (2 pages)

Completing an identity access review (supervisor)

To ensure security compliance or audit readiness you can perform identity access reviews to check your direct reports areas and roles access. These periodic reviews are completed by a supervisor.

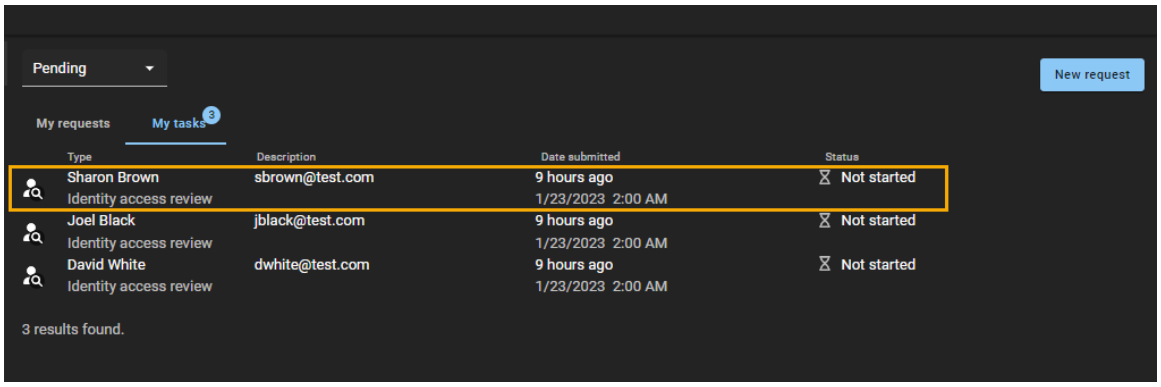
What you should know

- Supervisors can complete an identity access review from the **My tasks** page of the **Dashboard** or from an email notification.
- No changes can be made to an access review after it has been completed.
- All **Completed** reviews are retained for audit and tracking purposes.

Procedure

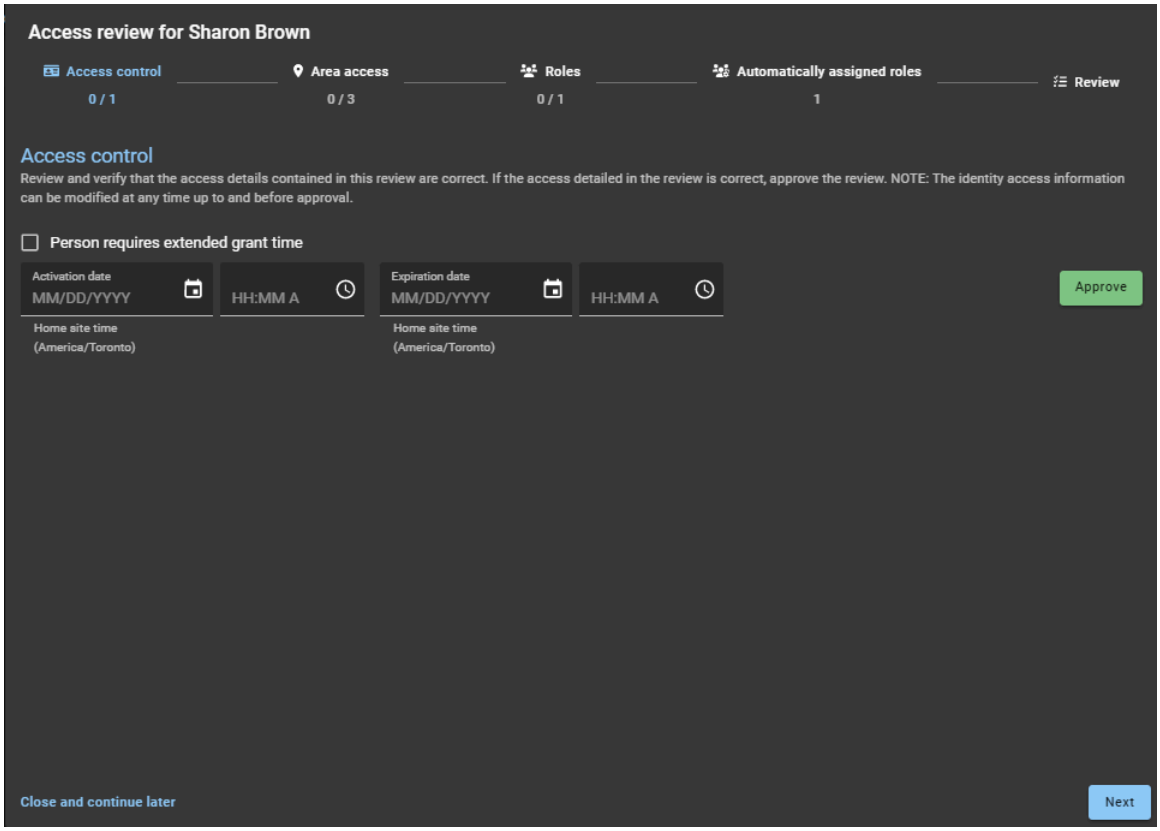
1 Click **Dashboard** > **My tasks**.

2 In the **My tasks** list, click the identity access review that you require.



3 Click **Continue review**.

4 In the *Access control* section, review the access control.



a) (Optional) If you want to extend the amount of time doors are unlocked (after access is granted) for cardholders with the property "extended grant time" turned on, select the **Person requires extended grant time** checkbox.

b) (Optional) Enter or select an **Activation date** `MM/DD/YYYY` and time `HH:MM.AM` for the cardholder.

If the activation fields are left blank the default current date and time are used.

c) (Optional) Enter or select an **Expiration date** `MM/DD/YYYY` and time `HH:MM.AM` for the cardholder.

When the expiration fields are blank, the cardholder never expires.

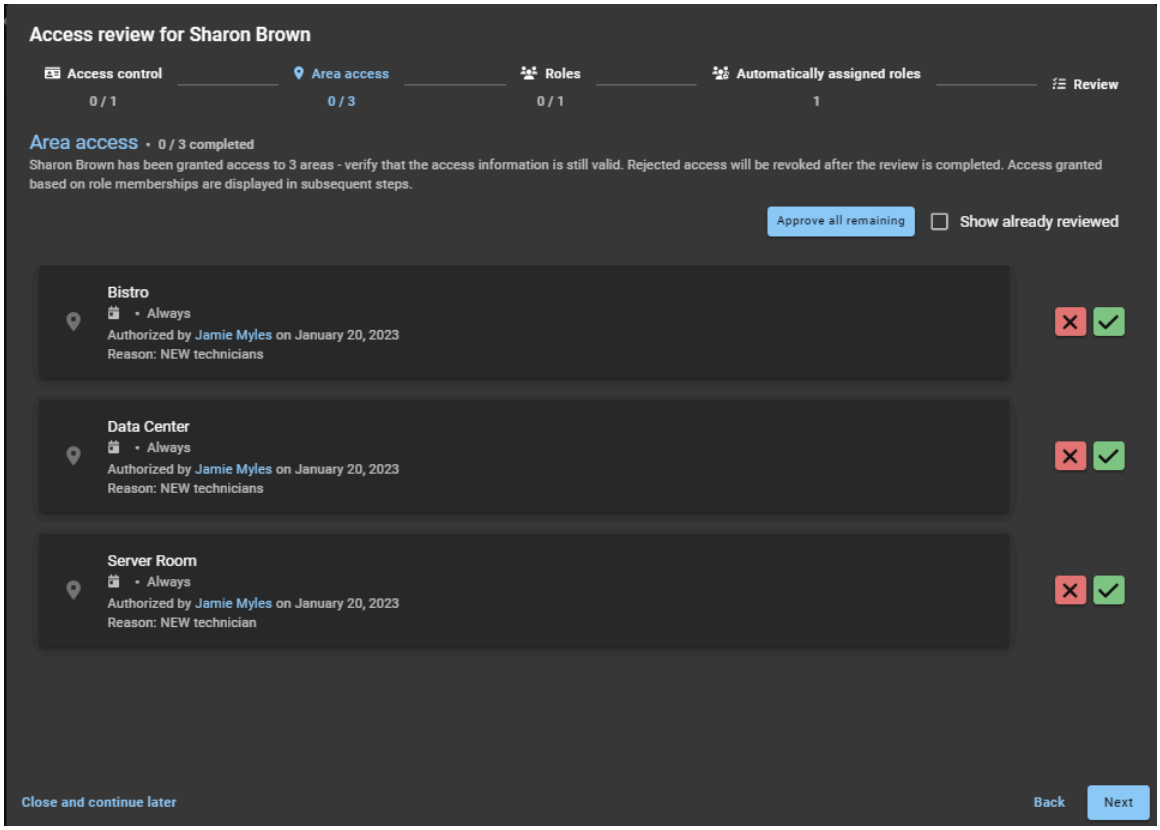
d) Click **Approve** to approve the access control settings.

NOTE: After an **Activation date** or **Expiration date** has been specified, you must include a time. Otherwise, the **Approve** button is disabled.

e) (Optional) If you change your mind about the settings, you can repeat the previous steps to make further modifications and then click **Approve** again.

f) Click **Next** to continue to the next section of the access review wizard.

5 In the *Area access* section, review the area access.



a) Click **Keep access** ( ) to confirm that access is still valid.

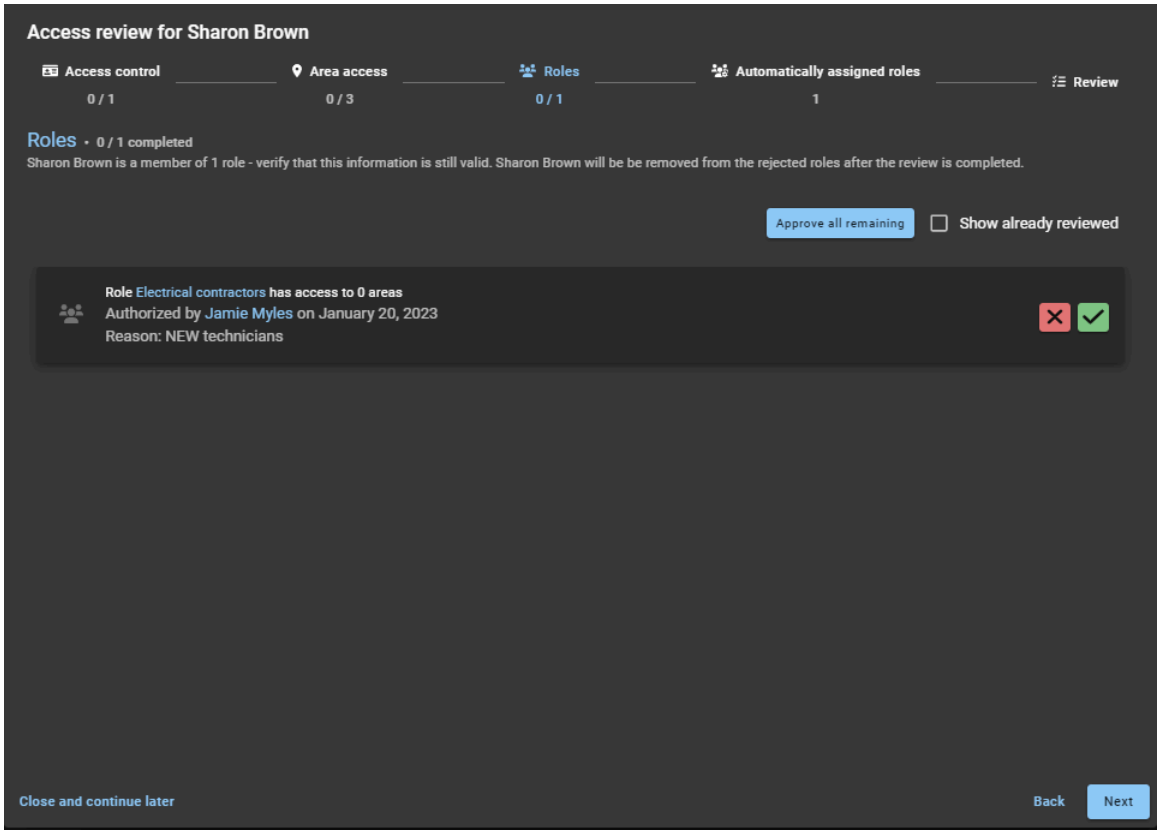
TIP: Use **Approve all remaining** to speed up approval process when the list is long, then remove any access that is no longer required.

b) Click **Remove access** ( ) to remove access that is no longer required.

c) (Optional) Select **Show already reviewed** to go back and make modifications.

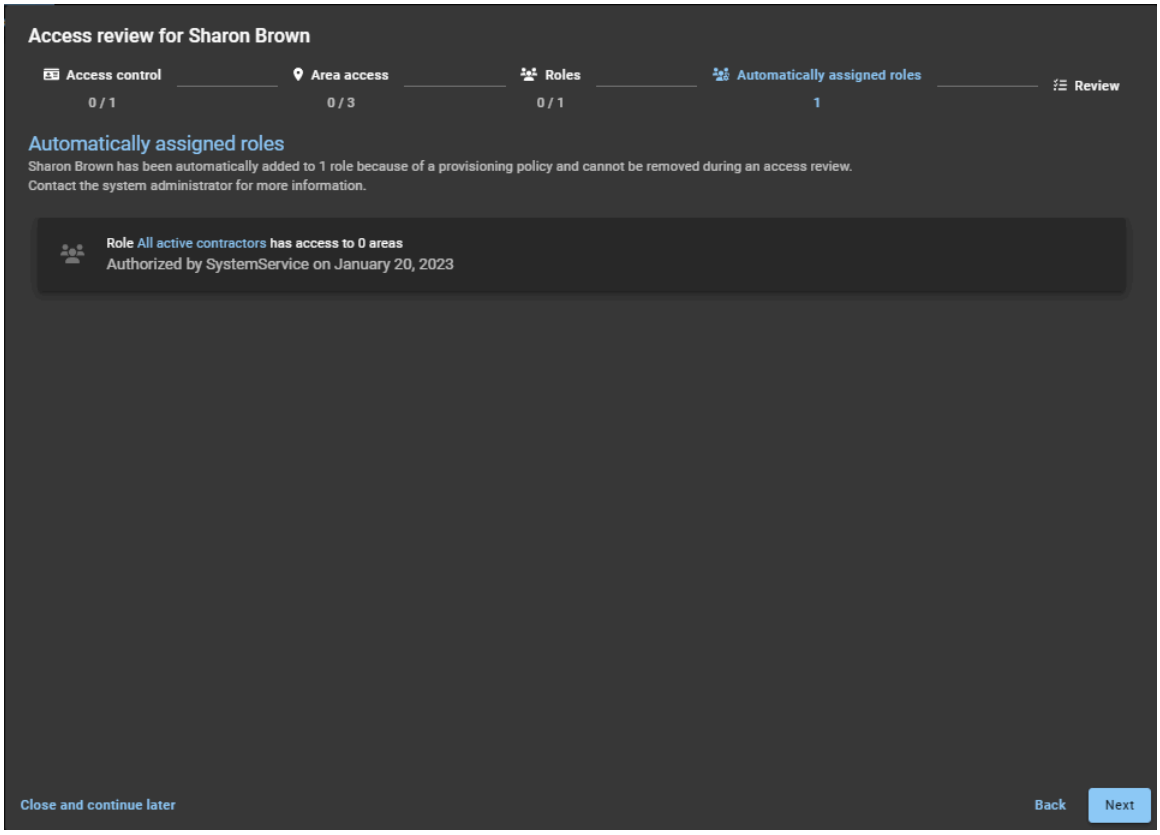
d) Click **Next** to continue to the next section of the access review wizard.

6 In the *Roles* section, review roles.



a) Verify the role information and either **Keep access** or **Remove access** as required.
b) Click **Next** to continue to the next section of the access review wizard.

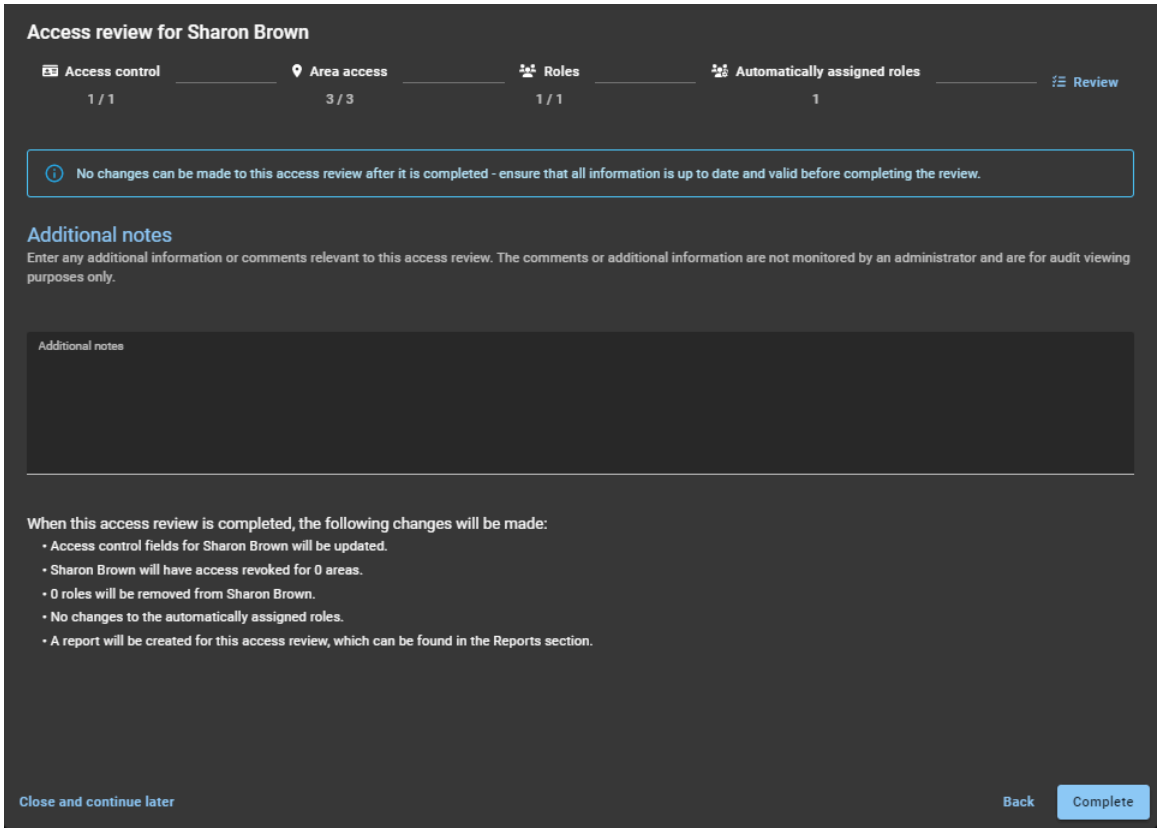
7 In the *Automatically assigned roles* section, review the automatically assigned roles.



The automatically assigned roles information here is useful context for a supervisor to review for accuracy and understand. It includes other access direct reports might have in addition to their manually assigned area access.

NOTE: Supervisors cannot modify any of this information because the roles were automatically assigned based on setup performed by an account administrator. If any automatically assigned roles information is no longer applicable, the account administrator should be contacted.

8 In the *Review* section, verify that the review details are correct.



a) In the **Additional notes** section, add any notes that you require.
b) Before you click **Complete**, review the changes summary immediately after the **Additional notes** section.
c) (Optional) If any of the information looks incorrect, click **Back** to return to previous sections and modify your changes.
d) If the **Review** section details are correct, click **Complete**.

9 Repeat this process as required for each identity listed in your **My tasks** dashboard inbox.

Example

After you finish

Generating an access review summary on page 316

Generating an access review summary

You can generate an access review summary for any completed access review to share with an auditor or other members of your organization.

Before you begin

Complete your access reviews.

What you should know

You can only generate an access review summary for a single completed access review.

Procedure

1 From the *Home* page, click **Reports** > **Access reviews**.

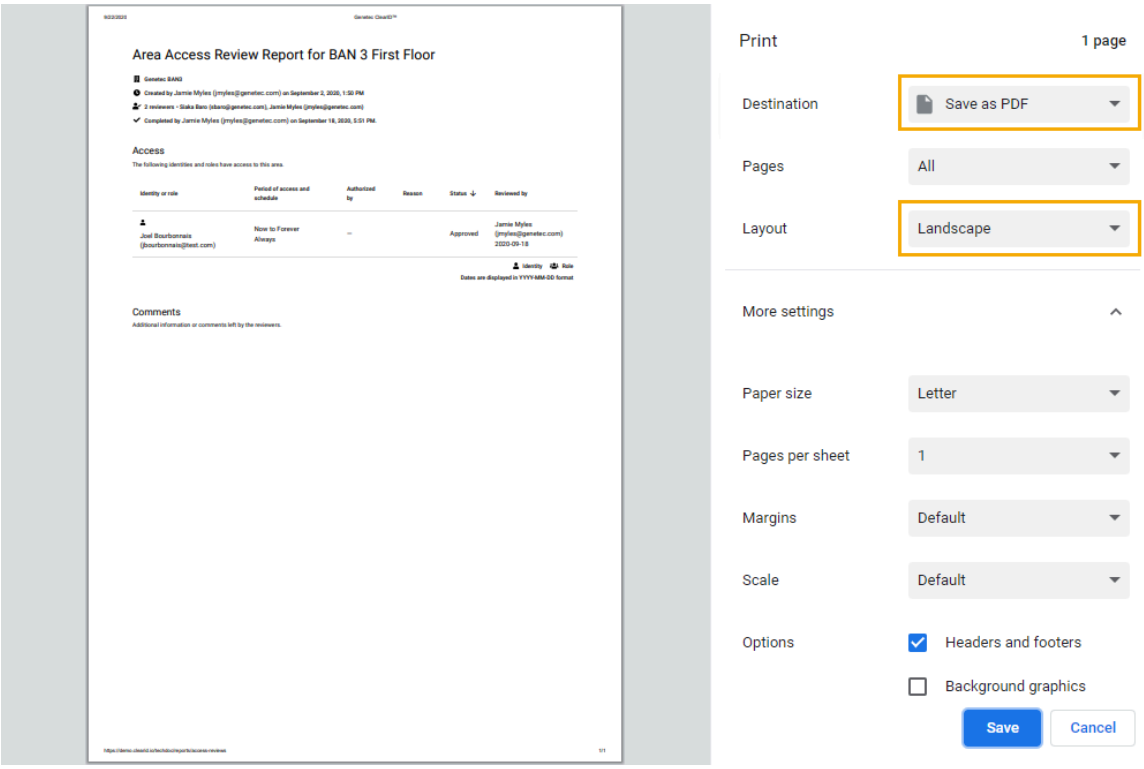
2 Configure report column filters to narrow report results as required.
   a) Click the **Status** filter and select **Completed**.
   b) In the **Review item** column, click the review item for the *completed* access review that you require.

3 Click **Print**.
   NOTE: The layout **Portrait** option and the **Background graphics** checkbox option are not supported.

4 In the *Print* section, select an option from the **Destination** list.

Typically the report is either sent to a printer for a hardcopy output, or saved as a PDF so that it can be sent to auditors or shared by email. Other destination options are also available.

BEST PRACTICE: In the **Layout** list, select **Landscape** for the best viewing experience.



IMPORTANT: The options displayed in the *Print* dialog vary depending on your browser, your local computer and attached peripherals, and your organizations setup.

5 (Optional) In the **More settings** section, select the **Headers and footers** option if you want to include the **Date** and the report **Filename** in the heading of the report.

6 If you selected a printer, click **Print** and follow the on-screen prompts.

7 If you selected **Save as PDF**, click **Save** and follow the on-screen prompts.

TIP: Use a file name that makes your access review reports easy to find during an audit or organization review. Include all useful information: area, role or group, and date. For example, *Data Center - Access Review July 2020*, *Server Room - Access Review August 2020*, or *IT Department - Access Review Sept 2020*. The default file name is *<Area or Role name> - Access Review YYYY-MM-DD.pdf*.

Your report has now been printed or saved as a PDF for reference later.

After you finish

You can now share the access review report with an auditor or other members of your organization.

About access requests report

In Genetec ClearID™, an access requests report is a list of access requests for a specific site. The report includes information about the access request date, area requested, status, requested by, requested for, and period of access.

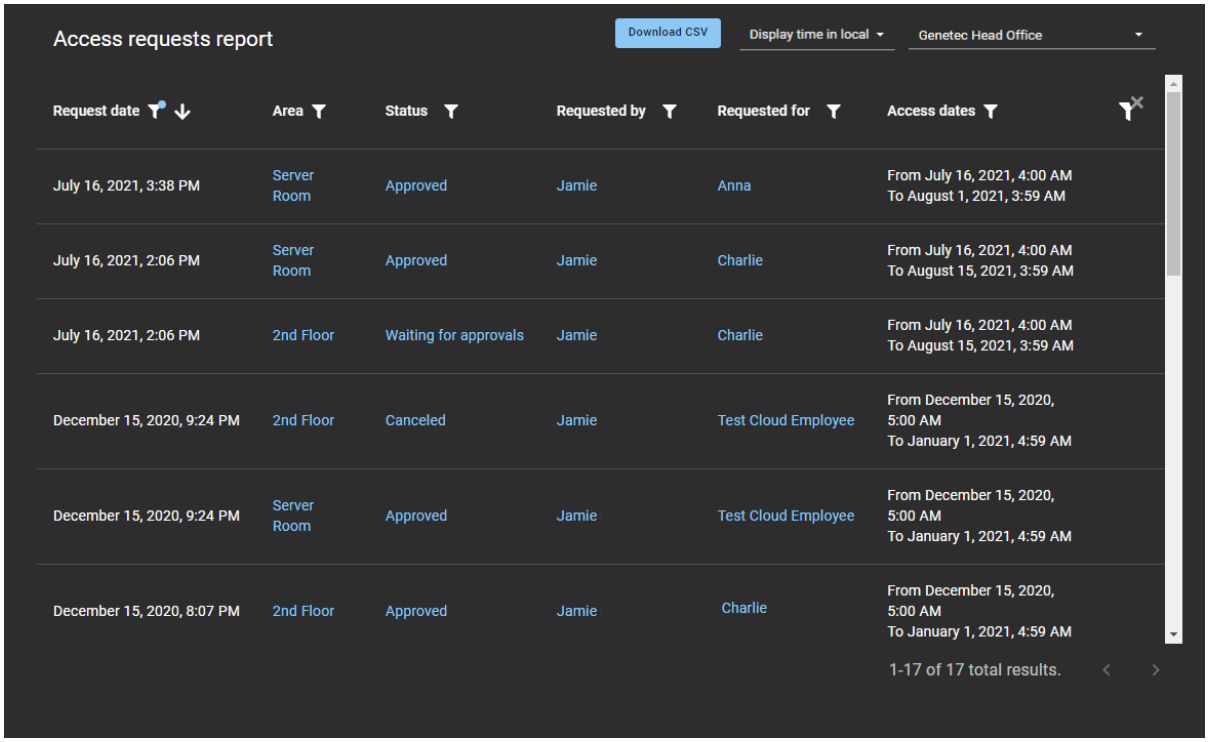


Figure 9: Access requests report

The access requests report is used by *area owners* and *site owners* to check the status of all access requests for a specific site and all the associated areas. The report can also be used to provide access request information to auditors.

Filters can be used to help refine the report search results by request date, area, status, requested by, requested for, and period of access.

Related Topics

Checking the status of access requests on page 319

Checking the status of access requests

As *Area owners* and *Site owners* you can check the status of access requests at the site level for areas associated with a specific site. Using the Access request report, you can ensure that the organization is security-compliant, audit ready, and that the requests are processed in a timely fashion.

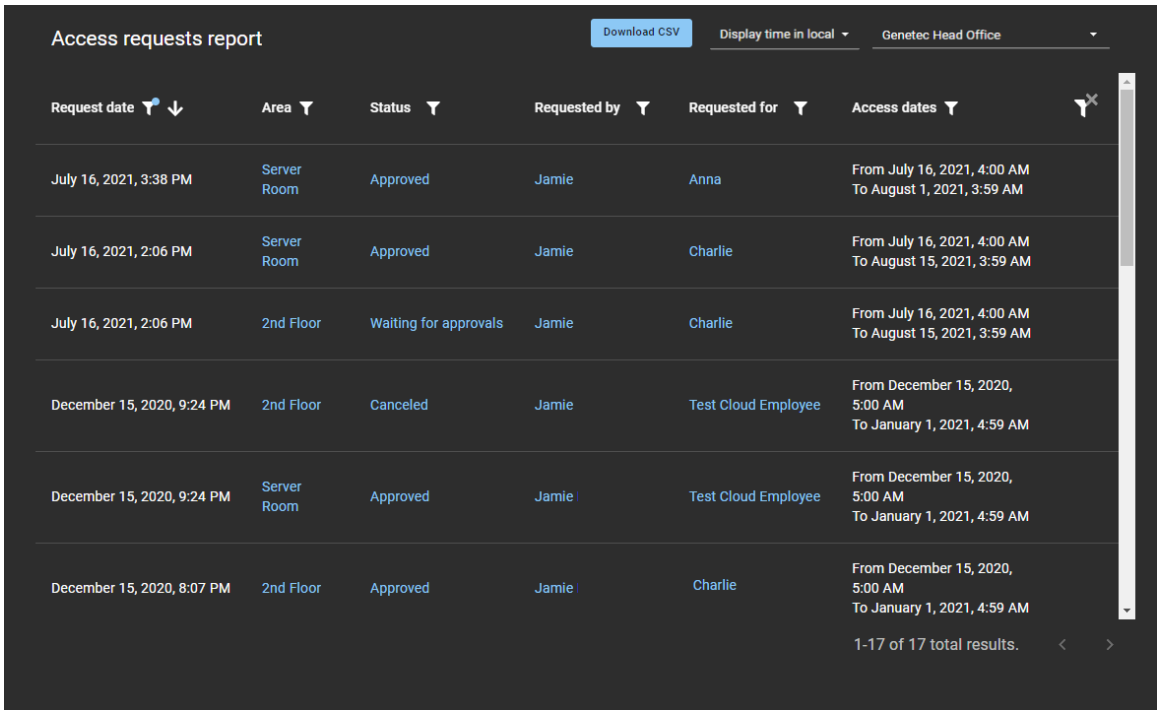
Before you begin

You must be an *Area owner* or *Site owner* to view the **Access requests report** and check the status or progress of access requests.

Procedure

1 From the *Dashboard*, click **Reports** > **Access requests**.

TIP: You can filter the results to suit different requirements. For example, to look for overdue requests, you can filter for **Waiting for approvals** in the **Status** column.



2 In the *Access requests report* page, select the required display time format. Choose one of the following:

- **Display time in local:** Show report times using the system time from the computer of the logged-in user.
- **Display time in UTC:** Show report times using Coordinated Universal Time (UTC).
- **Display time in site time zone:** Show report times using the time zone of the site.

3 From the **sites** list, select the site for which you want to review access requests.

4 In the **Request date** column, select one of the options, or click **Date range** and specify a date and time range to display a list of access reviews.

a) If you selected **Date range**, use the calendar picker to select the date range that you require.

NOTE: The time period for request date is limited to a maximum of 1 year.

b) (Optional) To sort the report results by **Request date** in ascending ( ) or descending ( ) order, click .

5 In the **Area** column, click to filter the results by area name.

a) Search for an area or select one or more **check boxes** to filter the results by the areas that you require.

b) Click the **Area name** hyperlink to display and verify the area details.

TIP: To revoke an access request, click the **Area name** hyperlink in the report, then click **Access** and click next to a user.

6 In the **Status** column, click to filter the results by status.

a) Select one or more **check boxes** to filter the results by the statuses that you require (Submitted, Waiting for approvals, Denied, Approved, Canceled, or Completed).

b) (Optional) Click the **Status** hyperlink to display the access request.

NOTE: If you're an approver, you can **Approve** or **Deny** the pending access request while viewing the request.

7 In the **Requested by** column, click to filter the results by access requester.

a) Enter a user name or email address in the search field.

b) (Optional) Click the **Requested by** hyperlink to display summary details about the requester.

8 In the **Requested for** column, click to filter the results by access recipient.

a) Select one of the following:

- **All:** Displays all identity and role access requests.
- **An identity:** Select **An identity**, then enter an identity in the search field when you want to filter access requests for a specific identity.
- **A role:** Select **A role**, then enter a role in the search field when you want to filter access requests for a specific role.

b) (Optional) Click the **Requested for** hyperlink to display summary details about the recipient.

9 In the **Period of access** column, click to filter the results using a date range.

10 Click **Download CSV**, to download a copy of the access requests report in CSV format. The report can then be used for auditing purposes, to keep a physical copy, to attach to an audit request, to review offline, or to manipulate or consolidate data in a spreadsheet for other audiences.

a) Follow your browser prompts to complete downloading the exported file.

The file is exported as a *.CSV* file to the default download location for your browser.
By default the exported file is created using the name of your site. For example, AccessRequest_*yoursitename*_*fromdate*_to_*todate*.csv (*AccessRequest_Genetec_Montreal_2024-09-14.csv*).

NOTE: The columns and entries in the CSV file can vary depending on the filters you've selected when you download the report.

11 (Optional) Click to reset filter selections.

You have now checked the status of all access requests at a site level for all areas associated with a specified site.

Example

Watch this video to learn more. Click the **Captions** icon (**CC**) to turn on video captions in one of the available languages.

After you finish

Approve or reject access requests as required:

- Approving area access requests on page 352
- Rejecting area access requests on page 354

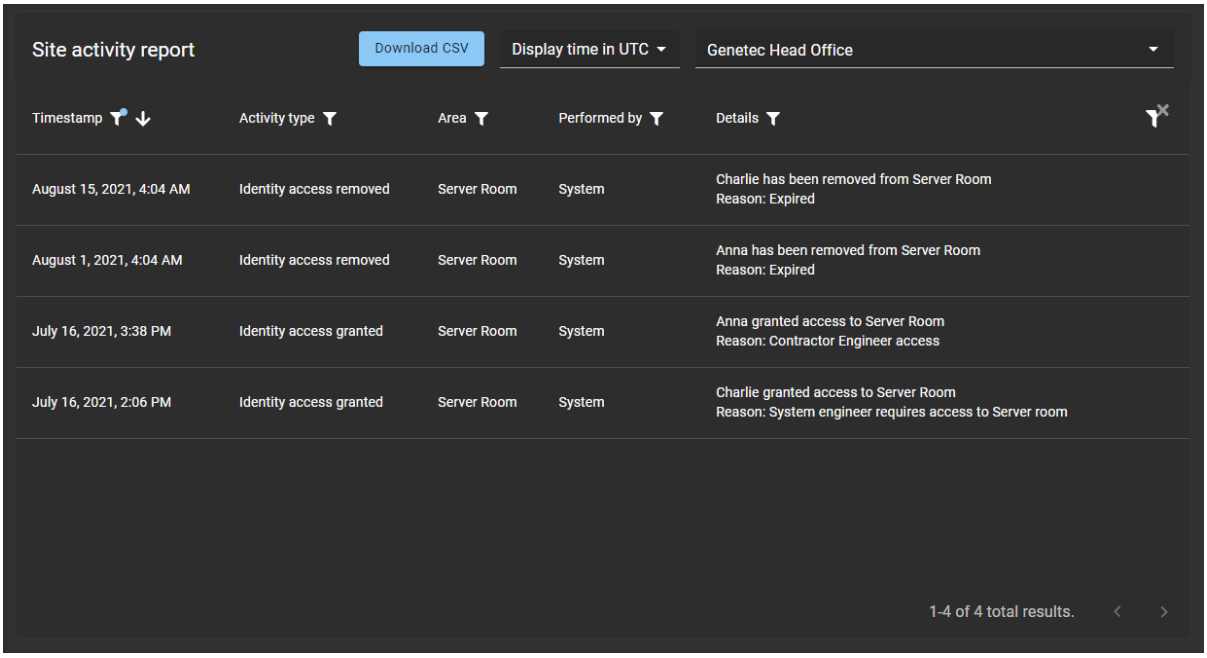
Related Topics

About access requests report on page 318
Requesting access on page 151

About site activity report

In Genetec ClearID™, a site activity report is an audit trail of activities or events for a specific site. The report includes timestamp information, activity type, area, who activity was performed by, and a details section including reason information.

Site activity report



The site activity report is used by *site owners* to check audit trail events at a site level. The report can also be used to provide site activity information to auditors.

Filters can be used to help refine the report search results by timestamp, activity type, area, performed by, and details.

Related Topics

Viewing a site activity report on page 323

Viewing a site activity report

You can view a site activity report to review an audit trail of activities or events for a specific site.

Before you begin

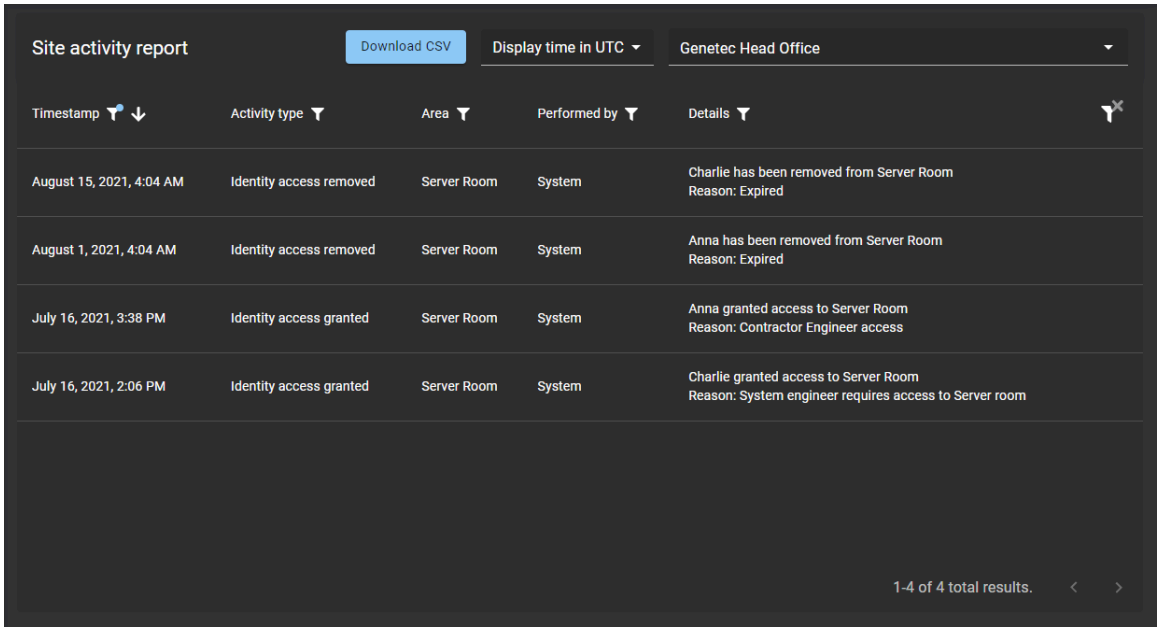
- Add area owners and managers
- Add role members
- Request access

What you should know

Only a site owner can view a **Site activity report** to review an audit trail of activities or events for a specific site.

Procedure

1 From the homepage, click **Reports** > **Site activity**.



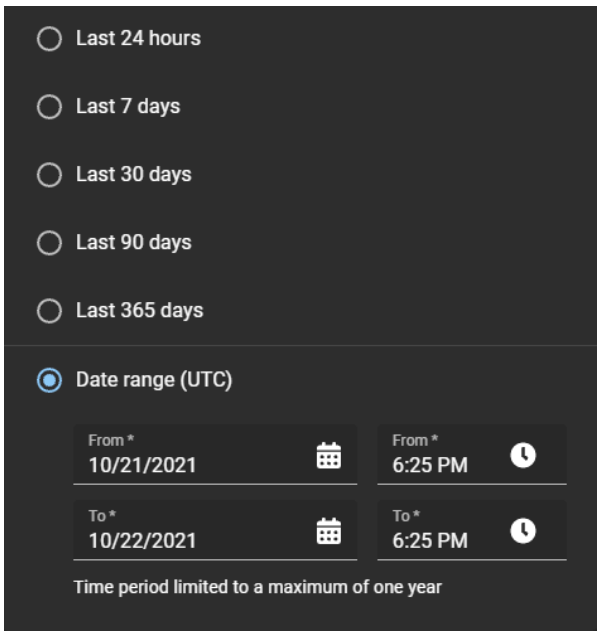
2 In the *Site activity report* page, select the display time that you require. Choose one of the following:

- **Display time in local:** Report times are displayed using the system time from the computer of the logged in user.
- **Display time in UTC:** Report times are displayed using Coordinated Universal Time (UTC).
- **Display time in site time zone:** Report times are displayed using the time zone of the site.

3 From the **sites** list, select the site that you require.

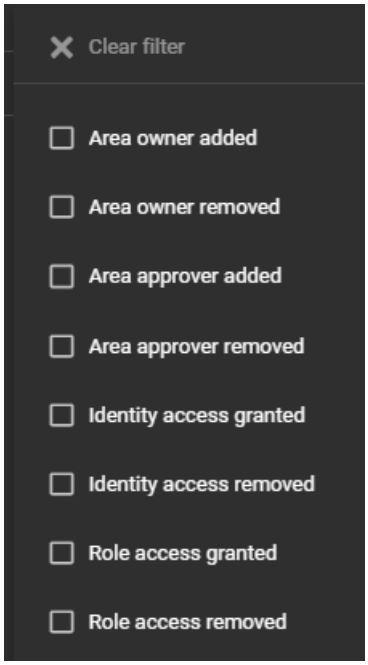
4 In the **Timestamp** column, click to filter the results by date.

a) Select a pre-defined date range from the choices available or enter a specific date range using the date range picker.

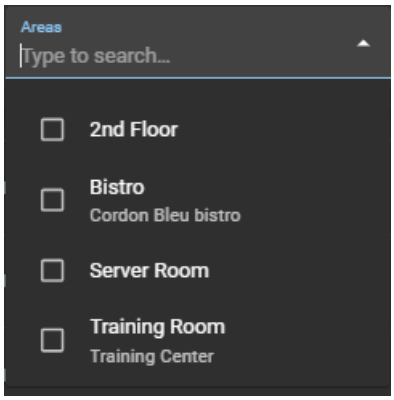


b) (Optional) Use the sort icons (and) to display the results in descending or ascending order.

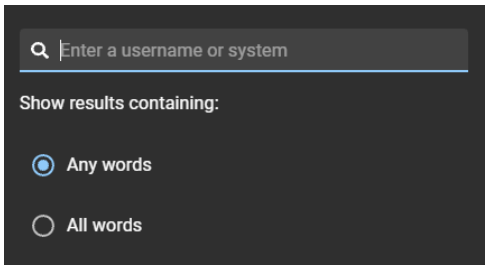
5 In the **Activity type** column, click to filter the results by activity type.



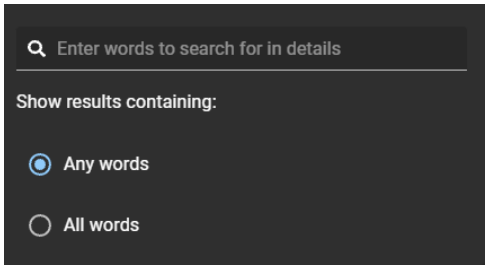
6 In the **Area** column, click to filter the results by area.



7 In the **Performed by** column, click to open a search dialog and filter the results by who performed an activity. For example, tasks performed by a particular user, or tasks performed automatically by the system.



8 In the **Details** column, click to open a search dialog to search the details or reason using a search criteria.



9 Click **Download CSV**, to download a copy of the site activity report in CSV format. The report can then be used for auditing purposes, to keep a physical copy, to attach to an audit request, to review offline, or to manipulate or consolidate data in a spreadsheet for other audiences.

a) Follow your browser prompts to complete downloading the exported file.

The file is exported as a *.CSV* file to the default download location for your browser. By default the exported file is created using the name of your site. For example, *yoursitename_fromdate*_to_*todate*_SiteActivityReport.csv (*Genetec Head Office_from_2020-10-22_to_2021-10-22_SiteActivityReport.csv*).

NOTE: The columns and entries in the CSV file can vary depending on the filters you have selected when you download the report.

10 (Optional) Click to reset filter selections.

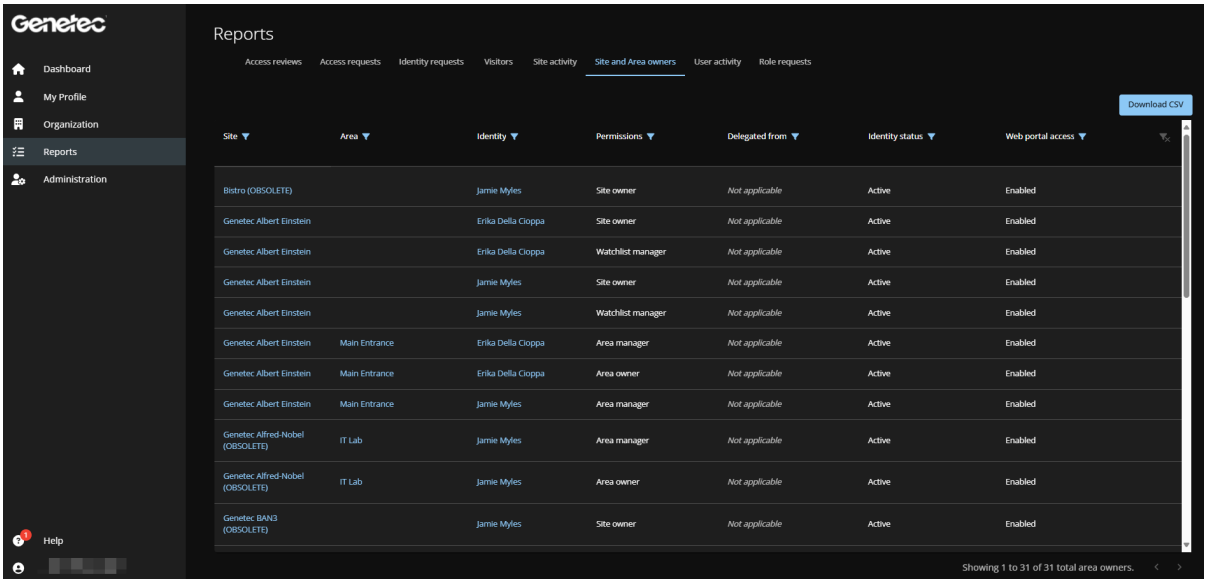
Related Topics

About site activity report on page 322

About site and area owners report

In Genetec ClearID™, a site and area owners report is a list that provides a global view of the following identities and their permissions: site owner, area manager, area owner, and watchlist manager. The report includes site, area, identity, identity permission, delegated from, identity status, and web portal access information.

Site and area owners report



The site and area owners report is used by account administrators to get a global view of all identities and their permissions. When the report is used by a site owner, only information about their own sites is shown.

Filters can be used to help refine the report search results by site, area, identity, permissions, delegated from, identity status, and web portal access.

Related Topics

Viewing a site and area owners report on page 327

Viewing a site and area owners report

You can view a site and area owners report to get a global view of all identities and their permissions.

Before you begin

Ensure that you have assigned identities for the following:

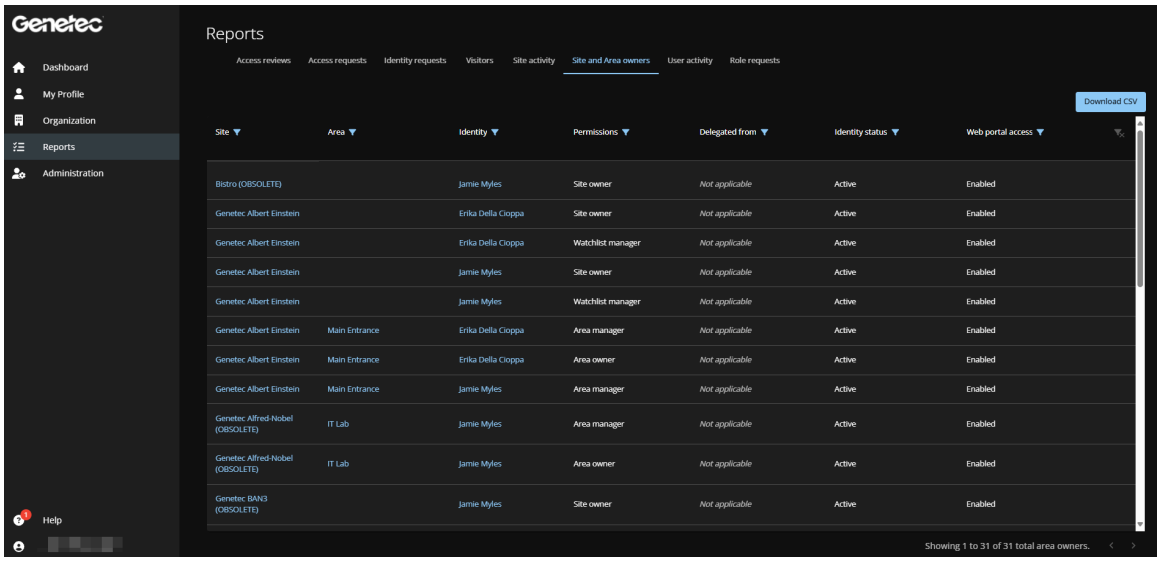
- Site owners
- Area owners and managers
- Watchlist managers

What you should know

Only an account administrator or site owner can view a **Site and area owners report** to review all identities and their permissions. When the report is used by a site owner, only information about their own sites is shown.

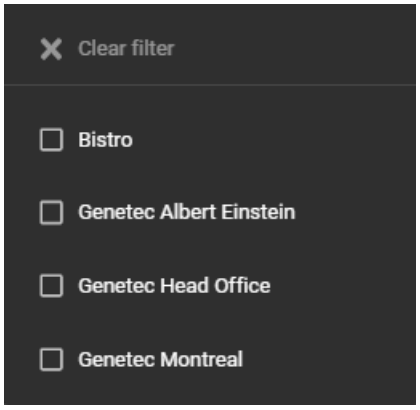
Procedure

1 From the homepage, click **Reports** > **Site and Area owners report**.

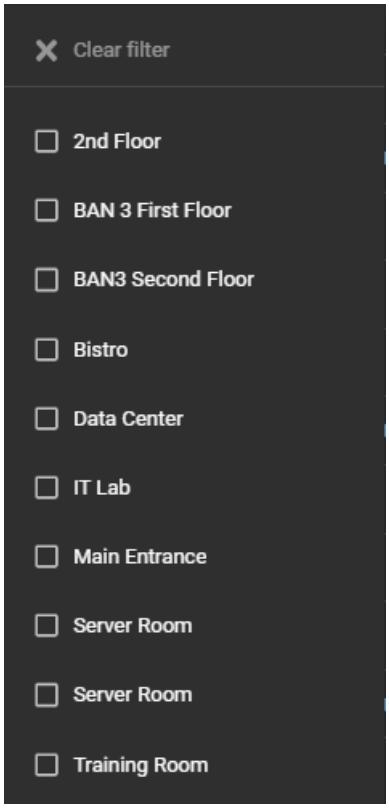


2 In the *Site and area owners report* page, select the filters that you require.

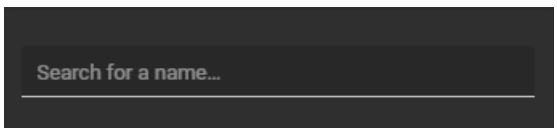
a) In the **Site** column, click to filter the results by site.



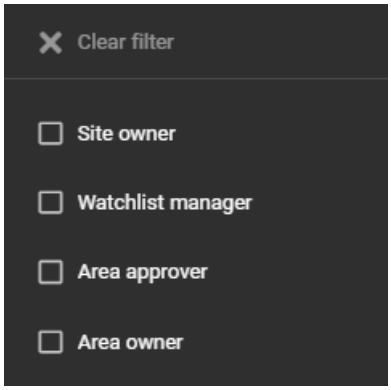
b) In the **Area** column, click to filter the results by area.



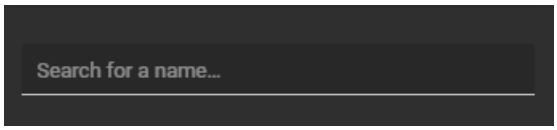
c) In the **Identity** column, click to open a search dialog and filter the results by an identity.



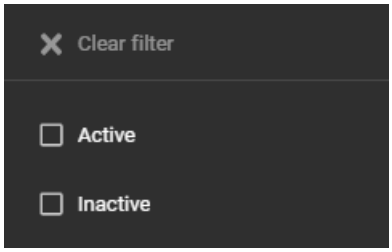
d) In the **Permissions** column, click to filter the results by permission type.



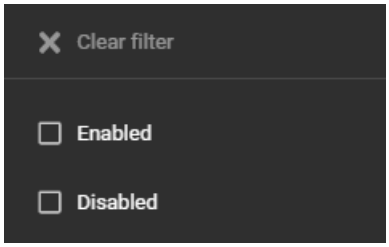
e) In the **Delegated from** column, click to open a search dialog and filter the results by a person delegating tasks.



f) In the **Identity status** column, click to filter the results by identity status.



g) In the **Web portal access** column, click to filter the results by web portal access.



3 Click **Download CSV**, to download a copy of the site and area owners report in CSV format. This report format can be used for auditing purposes, to keep a physical copy, to attach to an audit request, to review offline, or to manipulate or consolidate data in a spreadsheet for other audiences.

a) Follow your browser prompts to complete downloading the exported file.

The file is exported as a *.CSV* file to the default download location for your browser. By default the exported file is created using the report name and download date. For example, *SiteAreaOwners_2022-02-14.csv*.

NOTE: The columns and entries in the CSV file can vary depending on the filters you have selected when you download the report.

4 (Optional) Click to reset filter selections.

Related Topics

About site and area owners report on page 326

8

Managing areas

Learn how to manage areas.

This section includes the following topics:

About areas

In Genetec ClearID™, an area is a logical entity that defines the relationship between Synergis™ doors and area owners. Areas are managed by the area owner.

Doors are not managed in Genetec ClearID™, doors are managed in Security Center:

- Managing doors from ClearID is impractical due to the distance from the hardware.
- A door must be properly configured in Security Center and linked to the hardware physically managing the door.
- After areas are created in ClearID and synchronized in Security Center, doors can then be added to those areas in Security Center.

  NOTE: Doors moved under areas inherit the access rules of the area.
- Door setup is performed in Security Center separately from the areas. After both *doors* and *areas* are present in Security Center, doors must be added to areas.

Related Topics

Adding doors to areas on page 334

Creating areas

In Genetec ClearID™, an area is a logical entity that defines the relationship between Synergis™ doors and area owners. Areas are managed by the area owner.

Before you begin

- Create your sites.

What you should know

- Only account administrators or *site owners* can create areas in Genetec ClearID™.
- In Genetec ClearID™, an area owner is an identity with authority over an area. The owner can define the policy for an area, assign area managers, give or remove access, and approve or deny access requests for an area.
- An *area* is bound to or associated with a Security Center system.

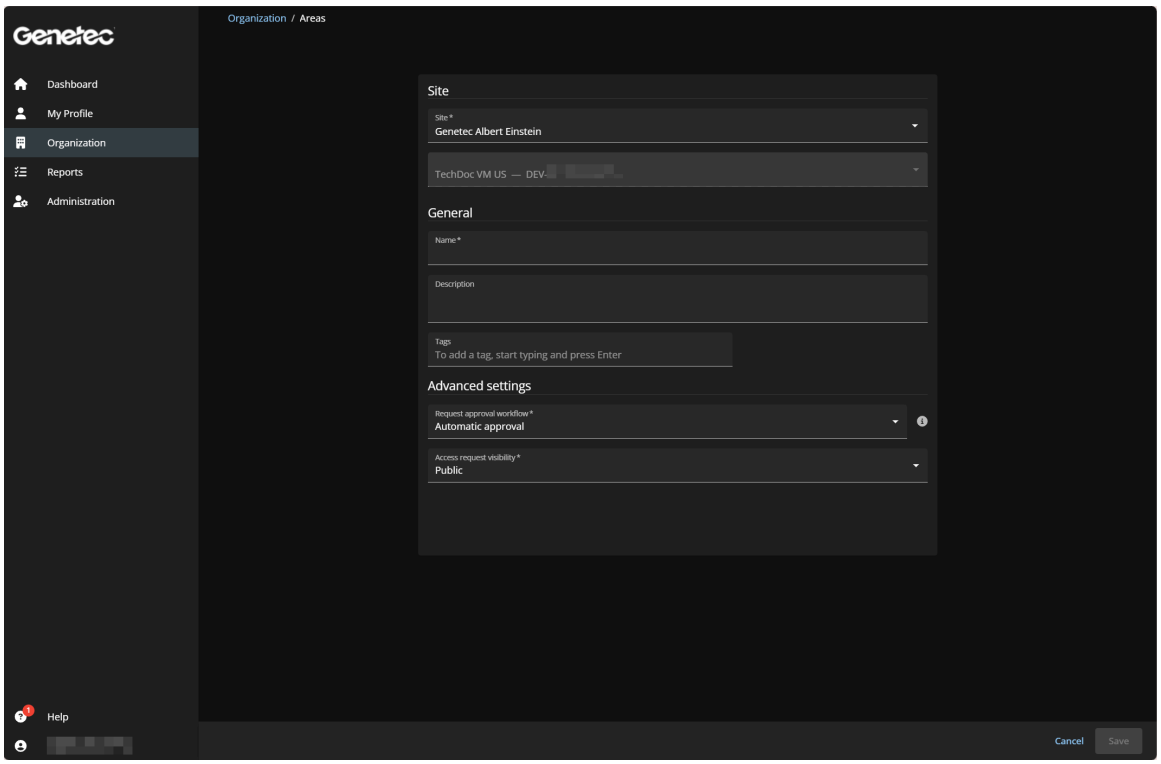
Procedure

1 Click **Organization** > **Areas**.

2 Click **Create area**.

NOTE: Mandatory fields are highlighted in the user interface with an asterisk (*).

3 In the *Site* section, complete the information fields:



- **Site:** From the **Site** list, select the site that you want to associate your area with.
- **Access control system:** This field is prefilled based on the previously selected site. This access control system is used to synchronize changes in ClearID back to Security Center.

NOTE: If a warning message is displayed instead of the associated ACS information, click the link to return to the site configuration and enter the associated ACS information.

a) In the *General settings* section, complete the information fields:

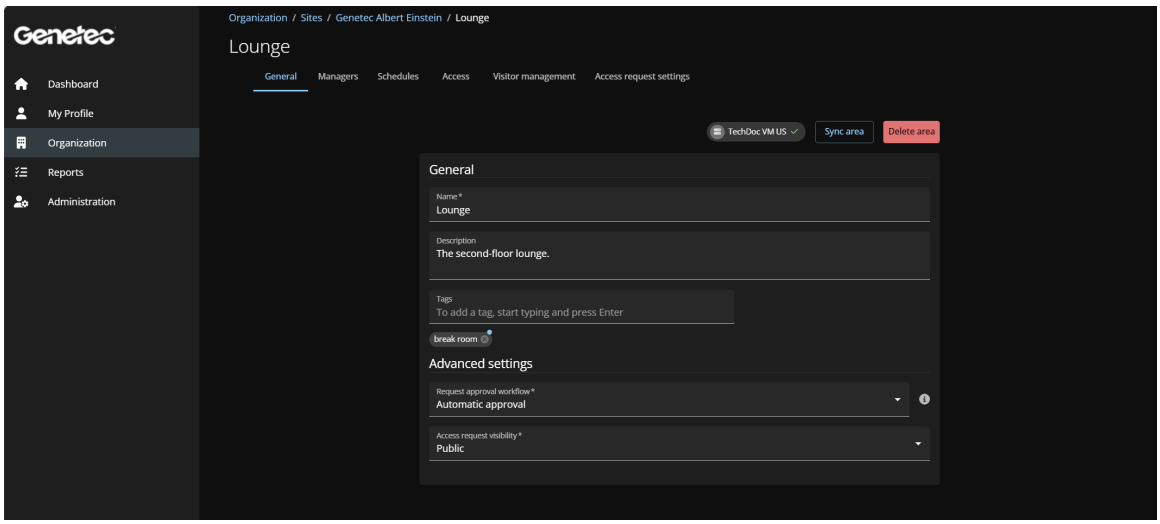
- **Name:** Enter an area name.
- **Description:** Enter a description that indicates the geographical location of the building or physical area.
- **Tags:** Enter alternative keywords or search term categorizations that might be used to find the area.

b) In the *Advanced settings* section, select the options that you require:

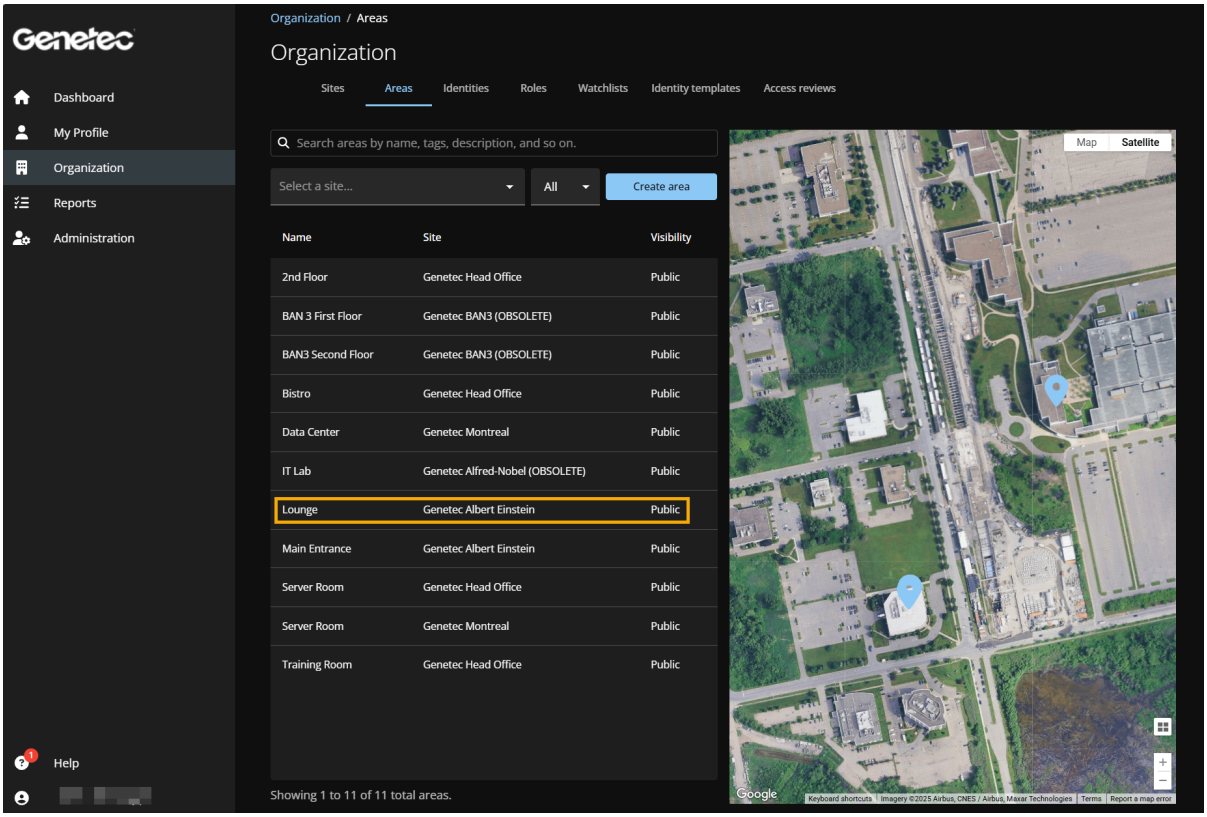
- **Request approval workflow:** Choose the approval workflow option that you require:
  - **Automatic approval:** Area requests are automatically approved using a role-based policy.
  - **Area managers:** Area requests are manually approved by authorized area managers.
  - **Supervisor and area managers:** Area requests are manually approved by supervisor and area managers.
  - **Supervisors:** Area requests are manually approved by supervisors.
- **Visibility:** Choose the visibility option that you require:
  - **Public:** The area is visible to everyone and access requests can be created for the area. This is the default setting.
  - **Private:** The area is private and should be hidden, and access requests are not supported for the area.

4 Click **Save**.

When the area is saved, commands are automatically sent to the plugin to create an area in Security Center.



Your area has now been created in ClearID.



Example

After you finish

Add area managers.

Adding doors to areas

Before you can submit access requests or invite visitors, you must add the doors in your areas to the associated areas that were automatically created in Security Center by Genetec ClearID™.

Before you begin

Create your areas.

What you should know

- Only Config Tool users with the *View door properties* privilege can add doors to areas in Security Center that are associated with areas in ClearID.
- When an area is created in ClearID, areas are automatically created in Security Center.
- Doors must then be added to the associated areas that are automatically created in Security Center.

Doors that are members of an area can be configured as *Captive* or *Perimeter* doors:

- Perimeter doors are used to enter and exit an area, and help to control access.
- Captive doors are used within an area.

Set the *door sides* correctly to ensure that *People counting* and *antipassback* are properly tracked. A door's *Entrance* and *Exit* sides are relative to the area being configured.

Procedure

1 From the Config Tool homepage, open the *Area view* task.

2 Select an area and then click the **Properties** tab.

3 In the *Doors* section, click **Add an item** (+) and select the doors that you want to link to your area.

4 For all doors in the *Doors* section, configure the door type:

- If the door is used to enter or exit the area, set the slider to **Perimeter**.
- If the door is located inside the area, set the slider to **Captive**.

  NOTE: If a smaller area is nested inside a larger area, you do not need to add the perimeter doors of the smaller area as captive doors of the larger area. The system automatically organizes nested areas when calculating people counts and applying antipassback rules.
- To swap the door sides, select the door and click **Swap door side**.

5 Click **Apply**.

Your doors are now added to the areas in Security Center that are associated with ClearID areas.

After you finish

In ClearID, you can now submit access requests or invite visitors.

Related Topics

About areas on page 331

Enabling visitor management for areas

Before visitors can request an area visit, you must configure the visitor management settings for your area.

Before you begin

Create your areas.

What you should know

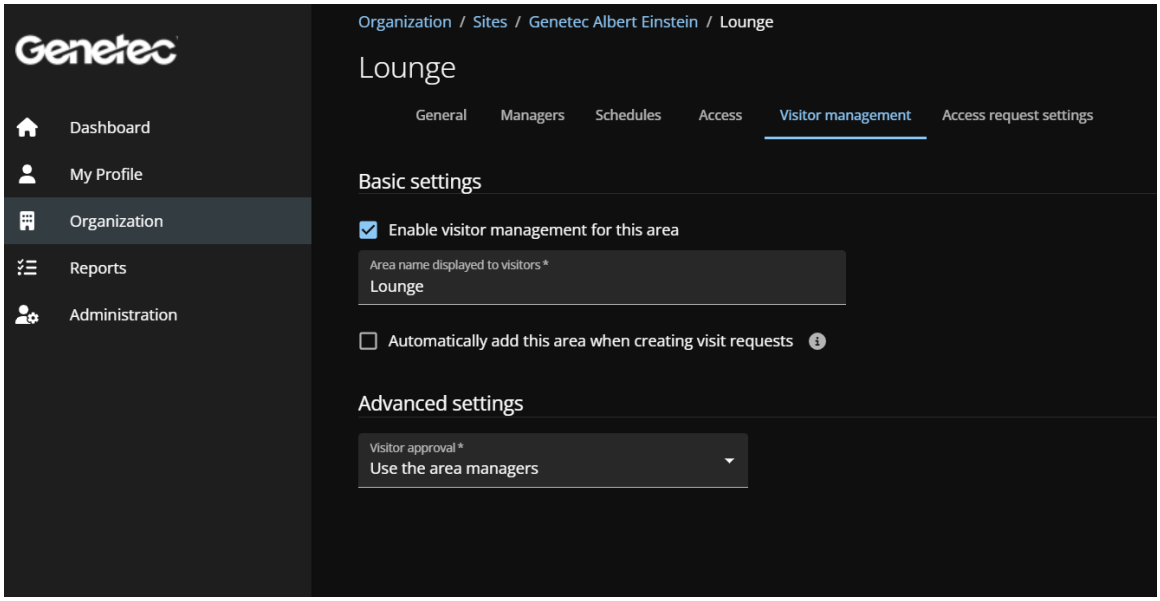
- Visitor management for areas is off by default.
- Only *area owners* or a *site owners* can enable visitor management for areas in Genetec ClearID™.
- The options displayed when a visit request is created vary depending on the users requesting access and also the settings that you configure here.

Procedure

1 Click **Organization** > **Areas**.

2 From the **Areas** list, select an area.

3 Under the **Visitor management** tab, configure the following options:



- **Basic settings:** Select the **Enable visitor management for this area** option to enable visitor management for this area.
- **Area name displayed to visitors:** Enter the area name that you want displayed in email notifications sent to visitors.
- **Automatically add this area when creating visit requests:** If you select this option, all guests in your visit request are automatically granted access to the requested area.
- **Advanced settings:** If you want to define guest access in your visit request, then specify the required approvers:
- **Visitor approval:** Choose the approvers for visitor access from the following options:
  - **Automatically approve visitors:** Automatically approve access requests for this area.
  - **Use the area managers:** Only area managers can approve or deny access requests for this area.
  - **Define visit approvers:** Only people in the **Visit approvers** list can approve or deny access requests for this area.

4 Click **Save**.

Visitor management is enabled for the area.

Example

Watch this video to learn more. Click the **Captions** icon (**CC**) to turn on video captions in one of the available languages.

After you finish

Access requests or visit requests can now be submitted for this area.

Related Topics

About workflows on page 12

About nested areas

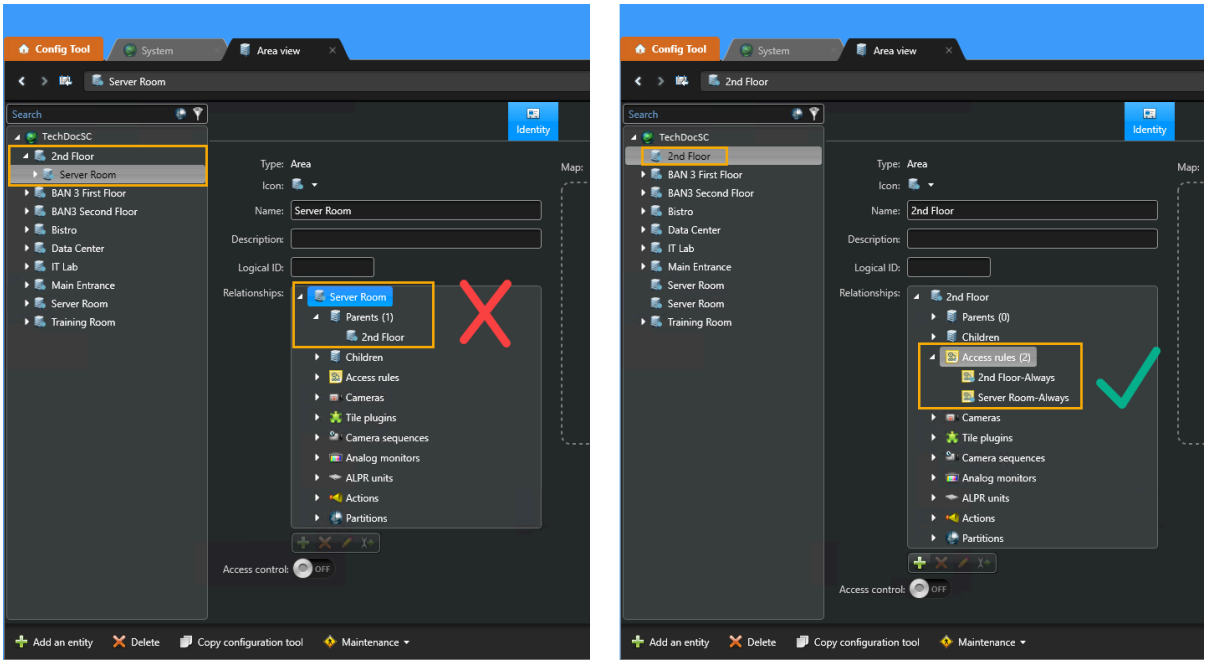
In Security Center, nested areas can be used to logically group areas so that access can be automatically granted to people for associated nested areas when access is requested in Genetec ClearID™ for one of the nested areas.

Nested areas are useful for organizations with lots of restricted areas, lots of logical grouping, or area dependencies. For example, when secure areas require access to other areas to get to the secure area:

- **Example 1:** Requesting access to a server room might automatically grant access to the floor that the server room is on.
- **Example 2:** Requesting access to a restricted area might automatically grant access to the floor the restricted area is on, and also grant access to the building that the floor and restricted area are in.

NOTE: In Config Tool, nesting areas using **Parents** or **Children** options in the *Relationships* section of the **Area** view does not inherit access.

BEST PRACTICE: Nest areas using **Access rules** options in the *Relationships* section of the **Area** view to inherit the required access. You can create nested areas to add access rules relationships for up to three logically associated areas. More than three areas nested together is not recommended.



Adding multiple access rules to an area creates the logical group association for nested areas. This relationship association ensures that the areas automatically grant access to the other associated areas when access is requested for one of the nested areas. By default ClearID automatically creates access rules for each schedule that is added to an area.

IMPORTANT: If the schedules for any of the nested areas change, the area relationships (access rules) must be configured again.

Related Topics

Granting access to areas automatically on page 338

Granting access to areas automatically

To automatically grant access for people to logically grouped areas, you can create nested areas for Genetec ClearID™ in Security Center.

Before you begin

- Create the areas that you require.
- Learn about nested areas.
- Plan the logical grouping of your areas before configuring your nested areas to automatically grant or inherit access.

What you should know

Only a Security Center administrator or system integrator can configure or map the nested areas.

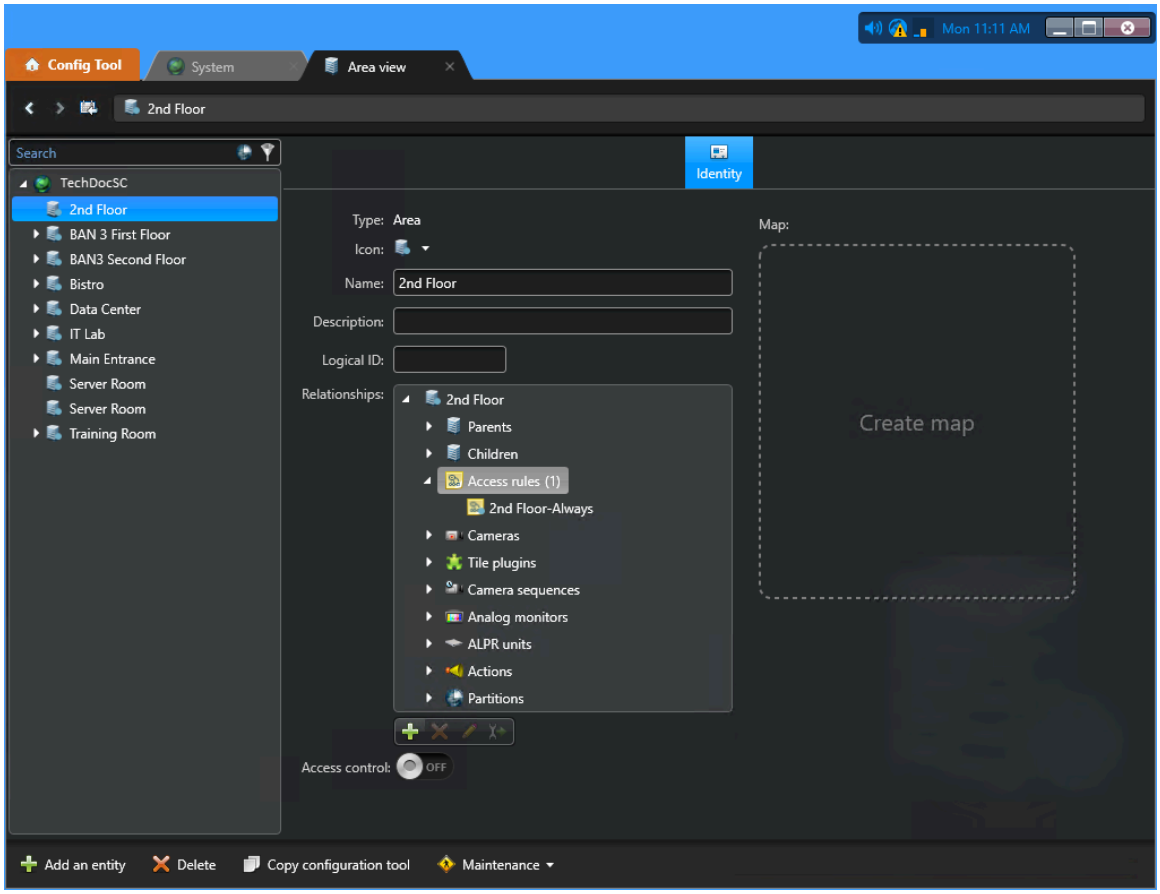
If the schedules for any of the nested areas change, the area relationships (access rules) must be configured again.

BEST PRACTICE: Nest areas using **Access rules** options in the *Relationships* section of the **Area** view to inherit the required access. You can create nested areas to add access rules relationships for up to three logically associated areas. More than three areas nested together is not recommended.

Procedure

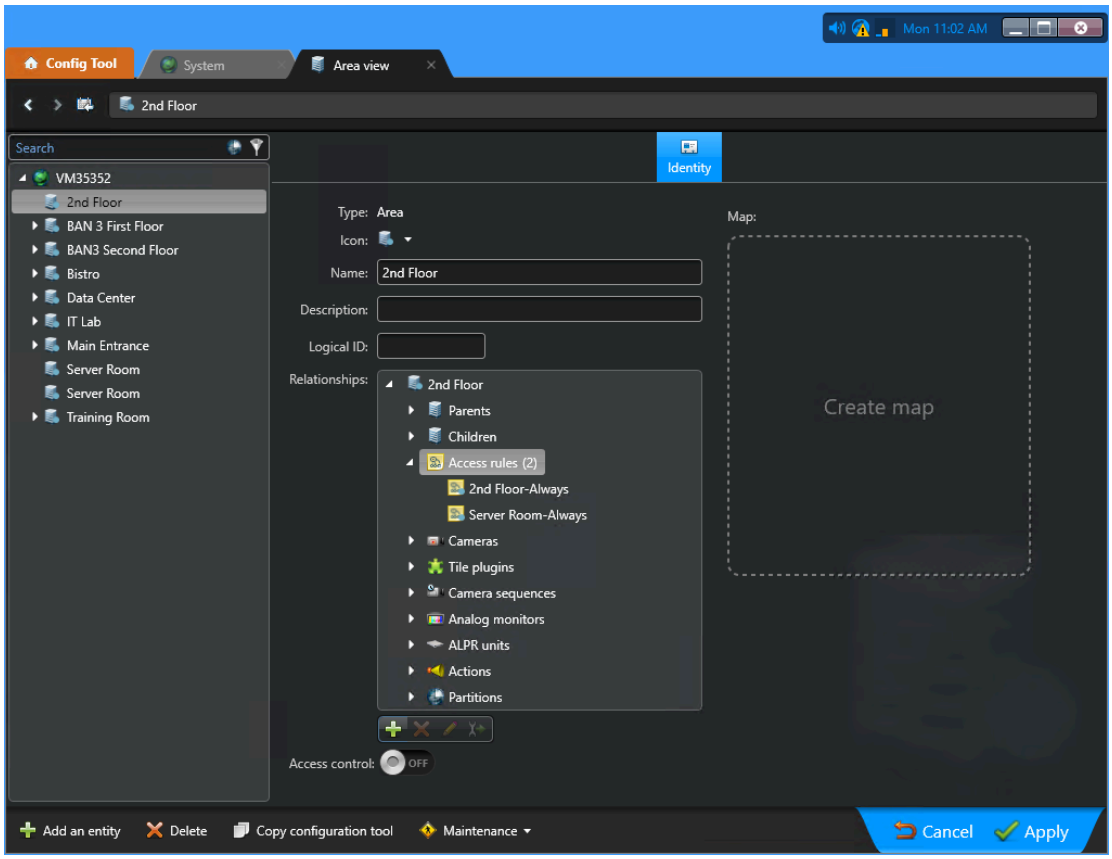
1 From the Config Tool homepage, open the *Area view* task.

2 In the **Area view**, click an area in the left navigation pane.



3 In the **Identity** tab **Relationships** section, double-click **Access rules**.

a) Click **Insert an item** ( ) then search for and select the *access rules* that contain the required schedules for the *areas* that you want to associate with the area selected earlier in step 2 on page 339.



TIP: You can also click **Entity type** and select the **Access rule** checkbox, then click **Search** to only display access rules in the entity list.

b) (Optional) Repeat for other areas.

4 Click **Apply**.

When an access request is received for an area that is part of a group of areas, access is automatically granted based on the relationships defined for the areas. In the previous example, anyone who has access to the Server Room is also automatically granted access to the 2nd floor.

Adding area owners and managers

Before you can define policies for an area, assign area managers, or approve or deny access requests for an area, you must add your area owners and managers.

Before you begin

Create your areas.

What you should know

- Only *area owners* or *site owners* can add area owners and managers in Genetec ClearID™.
- In Genetec ClearID™, an area owner is an identity with authority over an area. The owner can define the policy for an area, assign area managers, give or remove access, and approve or deny access requests for an area.
- In Genetec ClearID™, an area manager is an identity with approval authority over an area. The manager can give or remove access and approve or deny access requests for an area. They are also responsible for approving area access reviews.

Procedure

1 Click **Organization** > **Areas**.

2 From the **Areas** list, select an area.

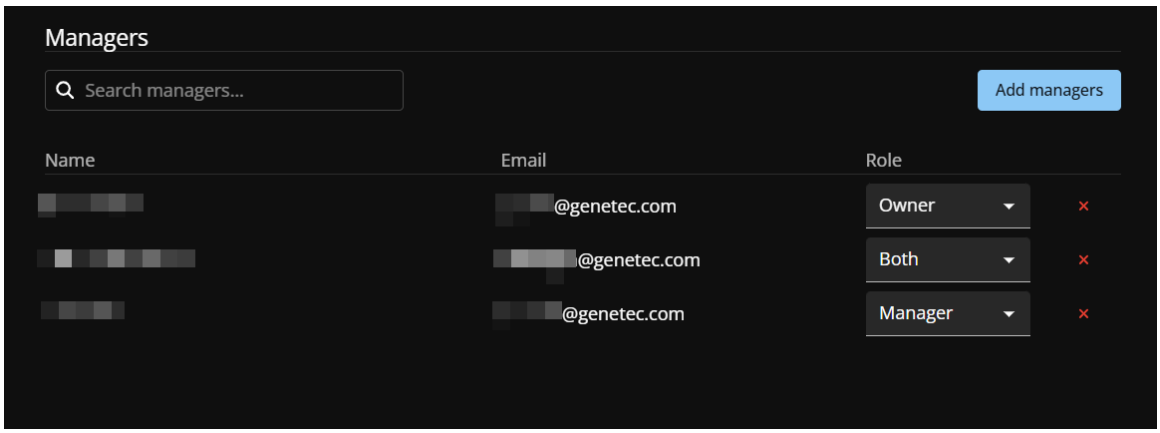
3 Click **Managers**.

4 Use the Search field or click **Add managers** to add an area owner or manager.

5 Select the required user or users and click **Confirm**.

6 Select the **Role** type for the user or users you added:

- Manager
- Owner
- Both



7 Click **Save**.

The selected people are added to the area as an owner, a manager, or both.

After you finish

Adding schedules to an area on page 342.

Adding schedules to an area

Before you can grant people access to an area, you must add schedules to your areas.

Before you begin

Define schedules in Security Center. For more information, see Creating schedules.

What you should know

- Only *area owners* can add schedules to an area in Genetec ClearID™.
- A schedule is an entity that defines a set of time constraints that can be applied to a multitude of situations in the system. Each time constraint is defined by a date coverage (daily, weekly, ordinal, or specific) and a time coverage (all day, fixed range, daytime, and nighttime).
- The schedules that are available for selection vary depending on the schedules defined in the Security Center access control system that is selected when you create your area.
- Some schedule examples include: Always, Weekdays, Weekend, 09:00-17:00, and so on.
- When a schedule is added to an area, an *access rule* is automatically created in Security Center. The *area-schedule* access rule defines the schedule that is associated with the area. ClearID automatically adds and removes access for a *cardholder* or *cardholder group* listed in the access rule based on the schedule specified in ClearID.

Procedure

1 Click **Organization** > **Areas**.

2 From the **Areas** list, select an area.

3 Click **Schedules**.

4 Click **Add schedule** to configure your area schedule.

a) Enter a search term and click **Search** ( ).

b) Select a schedule from the list and click **Confirm**.

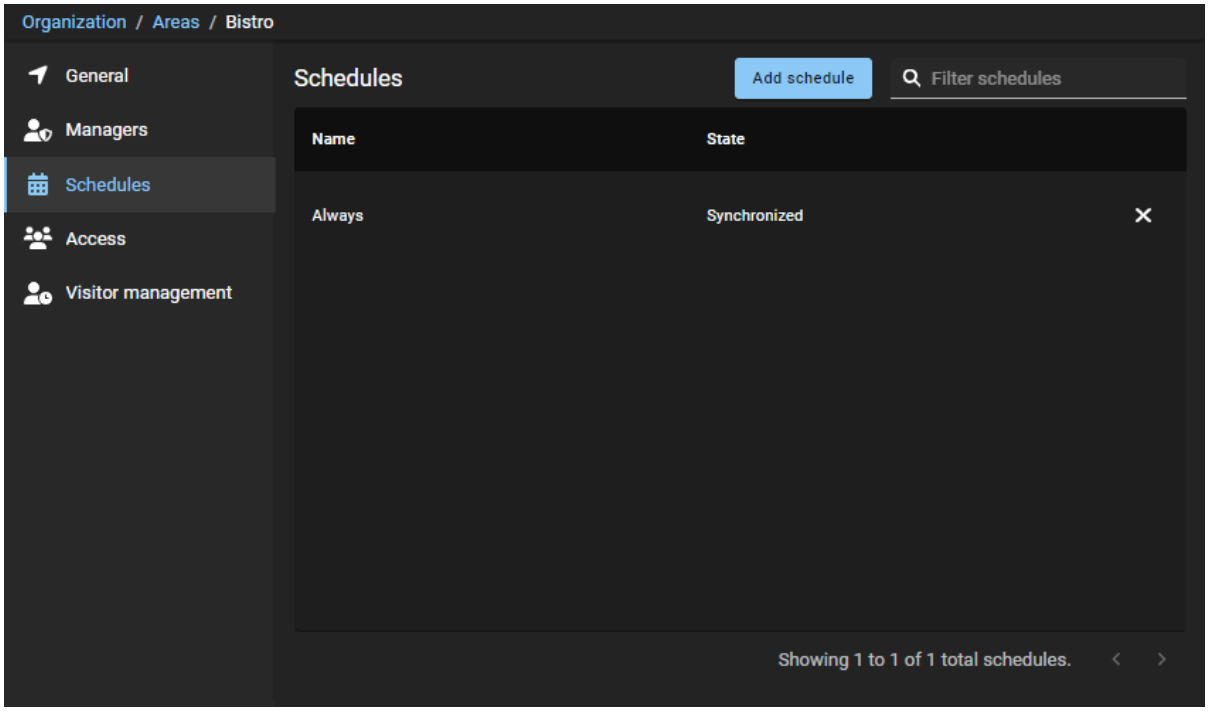
This list only shows schedules that are not already in your **Schedules** list.

c) (Optional) Repeat previous substeps to add additional schedules.

5 (Optional) Click **Remove** ( ) to remove any schedules that are no longer required.

6 Click **Save**.

Your schedules have been added to the area.



After you finish

Grant access to your area.

Configuring access request documents for areas

For areas with extra security measures or requirements, *Site owners* and *Area owners* can make it mandatory for employees to upload supporting documents like copies of drivers licenses or certifications when requesting access to areas.

Before you begin

Familiarize yourself with access request workflows.

What you should know

- As a *Site owner*, you can manage supporting document requirements for site-level access requests.
- Site or area owners can configure more supporting document requirements at the area level.
- You can configure up to 20 supporting document types per area.

Procedure

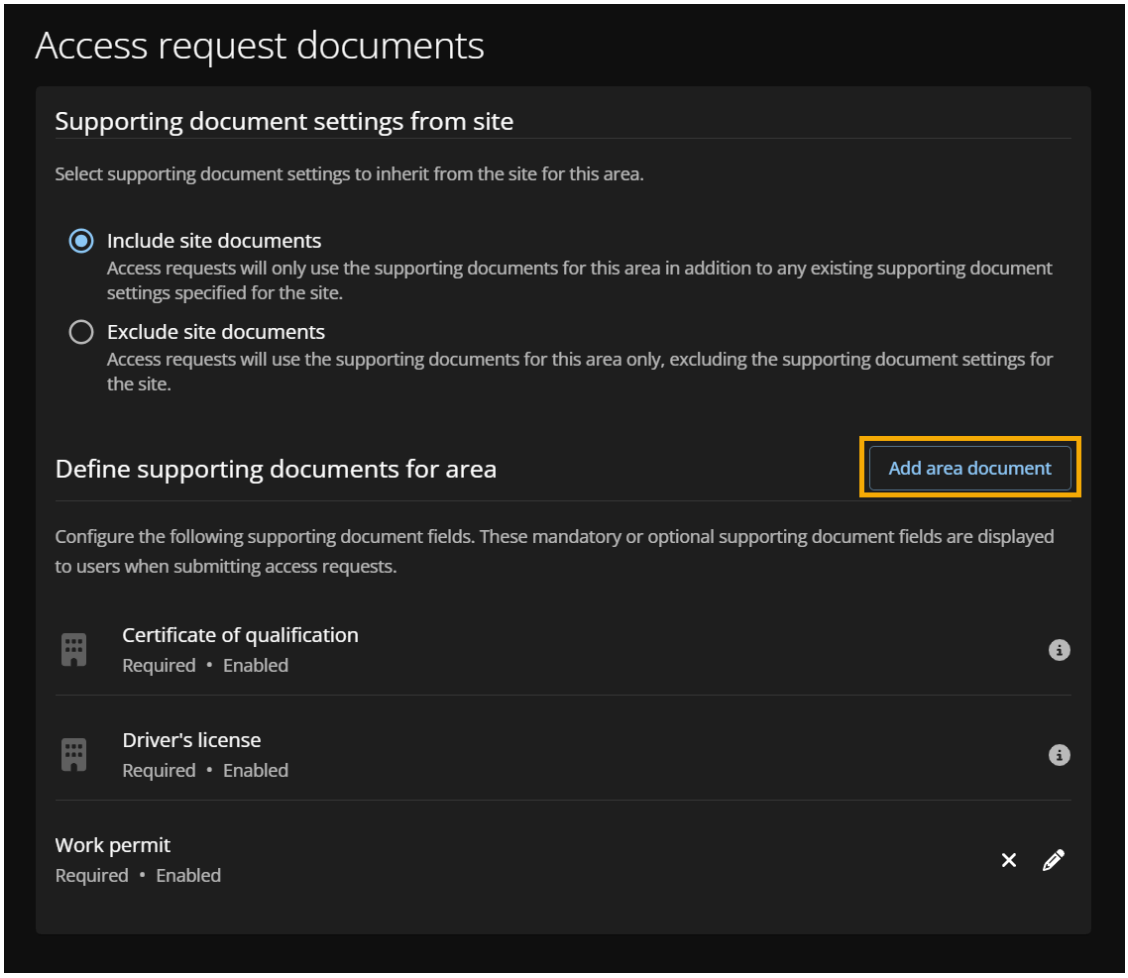
1 In the Genetec ClearID™ web portal, click **Organization** > **Site** > **Area** > **Access request settings**.

2 (*Site owner*) Under *Supporting document settings from site*, select the radio button to choose whether or not the specific area inherits supporting document requirements configured at the site level:

- **Include site documents :** Access requests use the supporting documents for the area in addition to any existing supporting document settings specified for the site.
- **Exclude site documents :** Access requests only use the supporting documents for the area, excluding the supporting document settings for the site.

NOTE: Include site documents is selected by default for areas. *Site owners* can change these settings.

3 Under *Define supporting documents for area*, click **Add area document**.



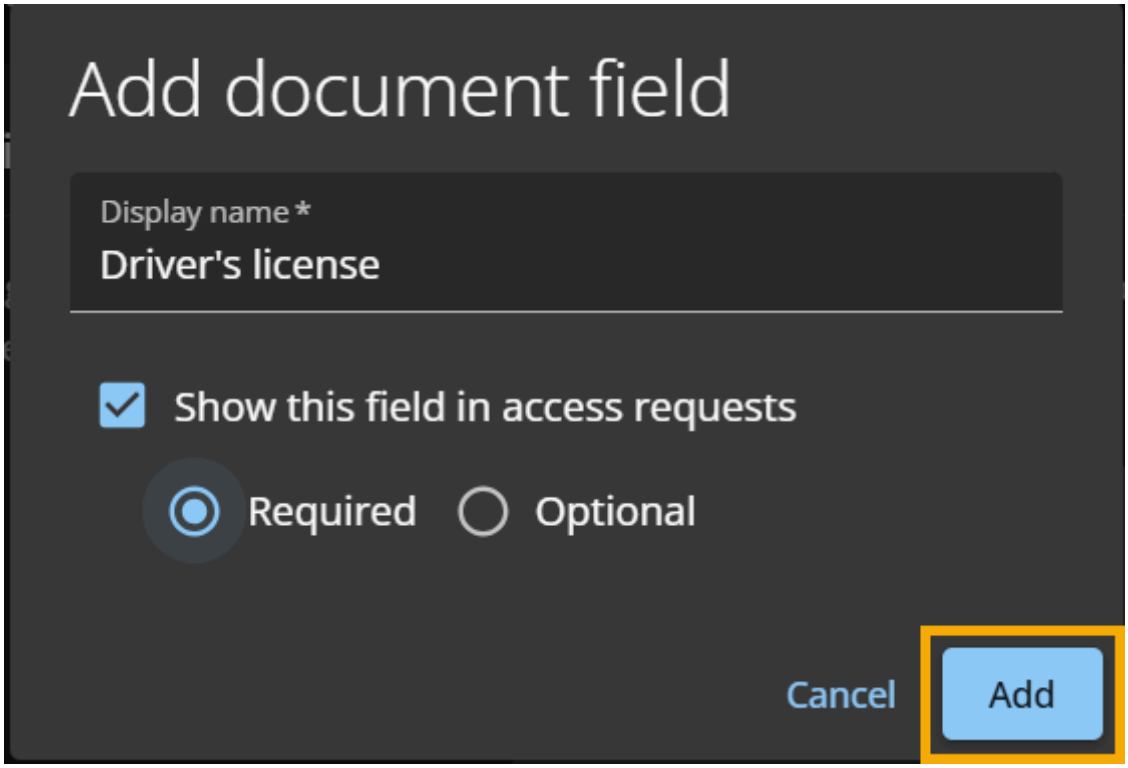
a) In the *Display name* field, enter a name for the document type.

b) Select **Show this field in access requests** to display the document field in access requests.

TIP: When the checkbox is cleared, the document type remains available in draft mode.

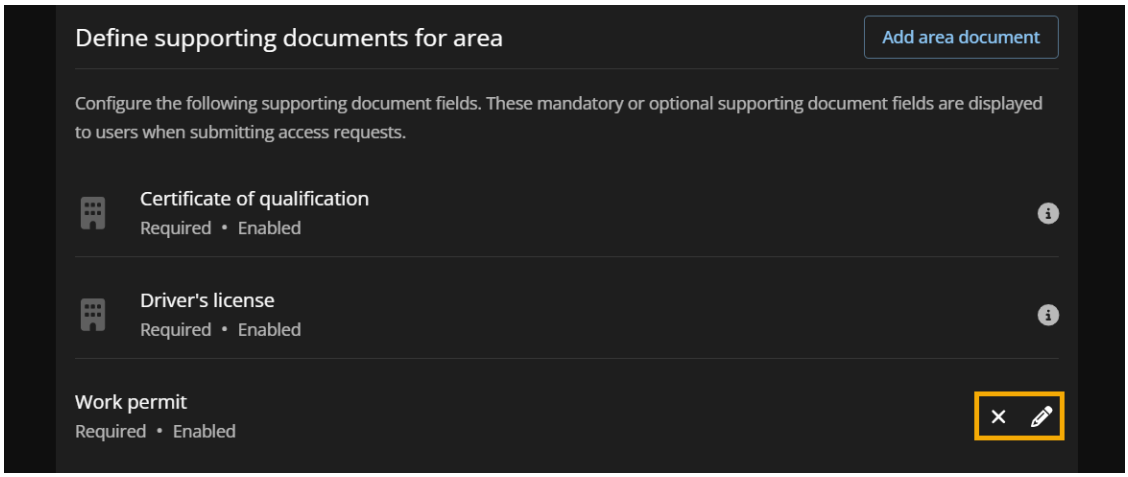
c) Choose whether or not uploading the document is mandatory when submitting an access request by clicking the **Required** or **Optional** radio button.

NOTE: You can configure a combination of mandatory and optional document types to appear in a single access request.



4 Click **Add**.

5 (Optional) You can use the icons to modify or remove each document type:



a) Click ✎ to modify the configuration of a supporting document.

b) Click ✕ to remove a configured supporting document.

Granting access to an area

To grant people access to an area, you must add identities or roles to an area and schedule access on a person-by-person or role-by-role basis.

Before you begin

Add schedules to your areas.

What you should know

- Only *area owners*, *area managers*, and supervisors can grant people or roles access to an area.
- The *Access* page shows all the identities, roles, and visitors that currently have access to the area.

Procedure

1 Click **Organization** > **Areas**.

2 From the **Areas** list, select an area.

3 Click **Access**.

4 Select a filter from the following:

- **All:**
  - If all the filter icons for access request type are available (), all access request types are displayed.
  - If all the filter icons for access request type are unavailable (), all access request types are hidden.
- **Identity access ():** Show or hide identity access.
- **Role access ():** Show or hide role access.
- **Visit request ():** Show or hide visit requests.

5 Click **Add access**.

a) In the *Grant area access* dialog, select either **Identities** or **Roles**.

6 If you selected **Identities**, complete the fields:

a) Enter an identity name and click **Search** ( ).

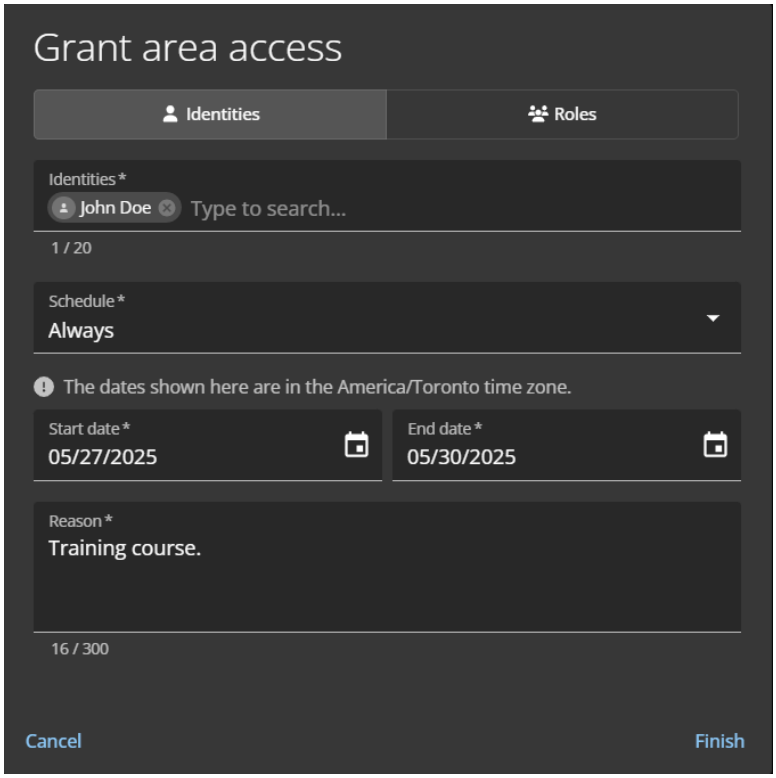
b) Select the identity name from the **Identities** list.

c) Search for or select the *schedule* that you require from the **Schedule** list.

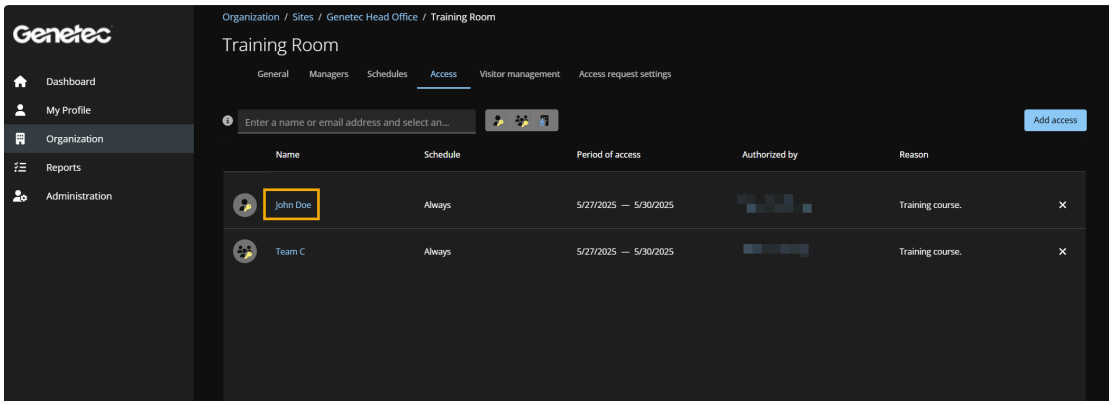
Some schedule examples include: Always, Weekdays, Weekend, 09:00-17:00, and so on.

d) Configure the period that you want the access for.

- **Start date:** Launch a calendar picker to choose the date that the access should start. The default is Now.
- **End date:** Launch a calendar picker to choose the date that the access should expire. The default is Forever.
- **Reason:** (Optional) Enter a reason for the period of access that you require. For example, access required for a business partner conference, employee access required for a multi-week project, and so on.



e) Click **Finish**.



7 If you selected **Roles**, complete the fields:

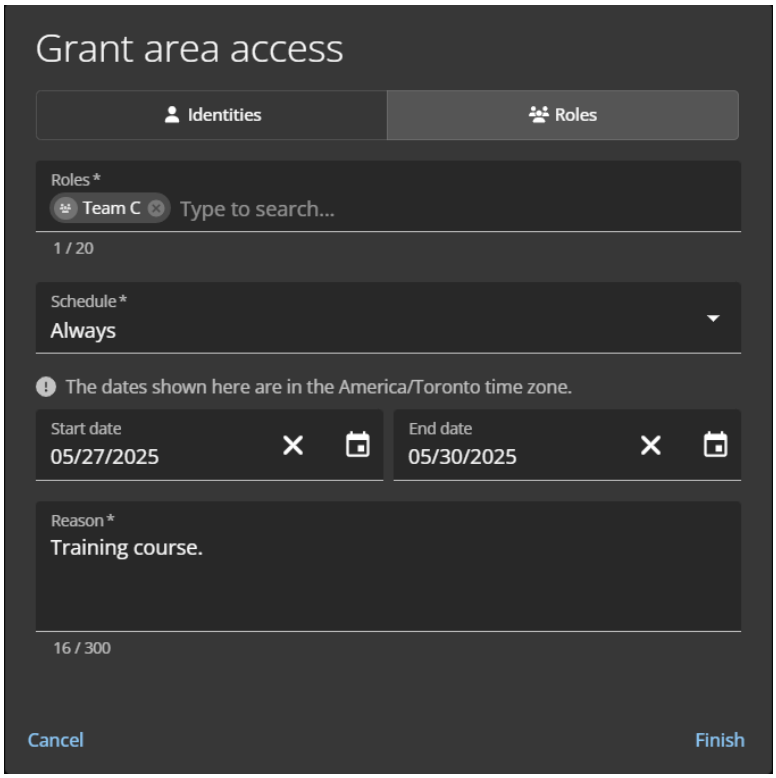
a) Enter a role name and click **Search** ( ).

b) Select the role name from the **Roles** list.

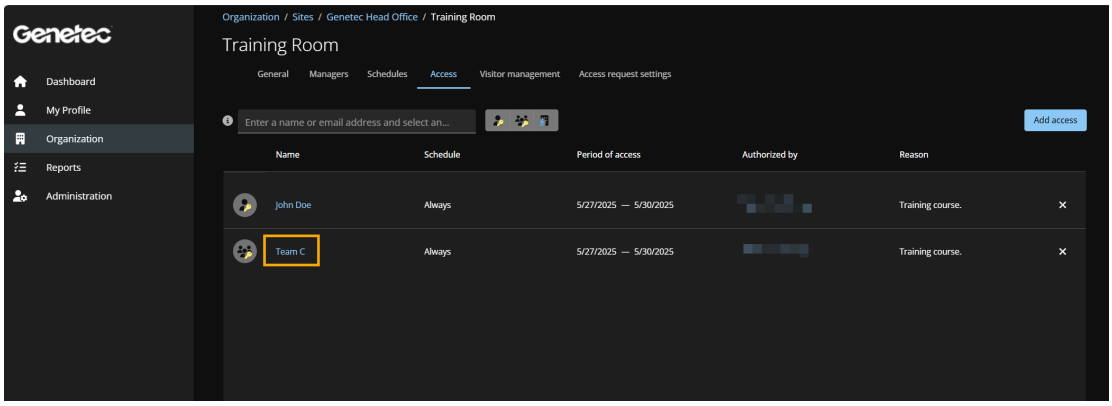
c) Search for or select the *schedule* that you require from the **Schedule** list.

d) Configure the period that you want the access for.

- **Start date:** Launch a calendar picker to choose the date that the access should start. The default is Now.
- **End date:** Launch a calendar picker to choose the date that the access should expire. The default is Forever.
- **Reason:** (Optional) Enter a reason for the period of access that you require. For example, access required for a business partner conference, employee access required for a multi-week project, and so on.



e) Click **Finish**.



8 (Optional) Click **Remove** ( ) to revoke any access that is no longer required.

Your access requests have been granted for this area.

Reviewing area access

To perform an audit or check who has access to an area, periodic reviews must be performed by an area owner, area manager, or site owner.

What you should know

Only *area owners*, *area managers*, and *site owners* can review area access.

This procedure describes how to verify who has access to a specified area, one area at a time.

Procedure

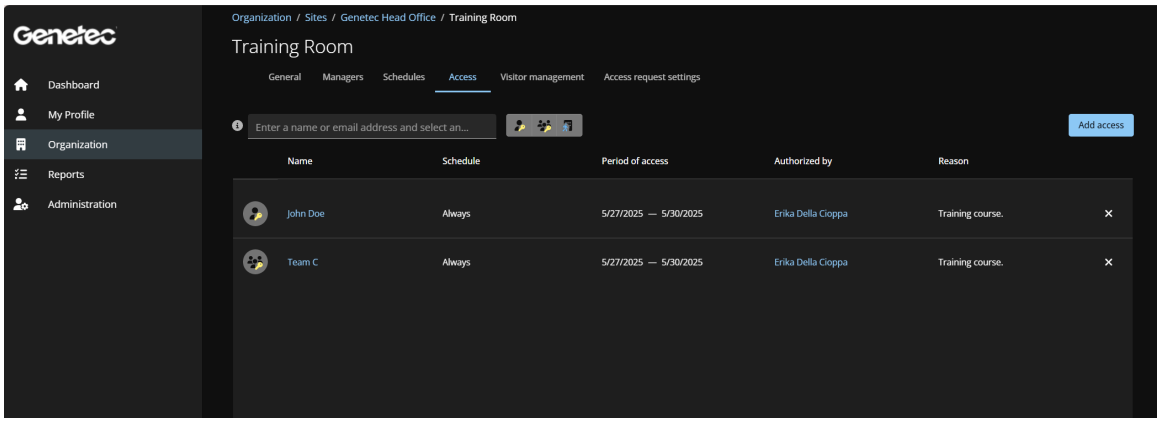
1 Click **Organization** > **Areas**.

2 From the **Areas** list, select an area.

3 Click **Access**.

4 Select an access request filter:

- **All:**
  - If all the filter icons for access request type are available (), all access request types are displayed.
  - If all the filter icons for access request type are unavailable (), all access request types are hidden.
- **Identity access ():** Show or hide identity access.
- **Role access ():** Show or hide role access.
- **Visit request ():** Show or hide visit requests.



5 Review the access list to identify any roles, identities, or visitors that can be removed or that require further investigation.

After you finish

Approve access requests or reject access requests.

Related Topics

Setting up area access reviews on page 277
Completing an area access review (site owner) on page 292

Approving area access requests

To approve area access requests, an *Area owner*, *Area manager*, or a *Supervisor* must review the pending approvals. They can then decide which requests to approve.

Before you begin

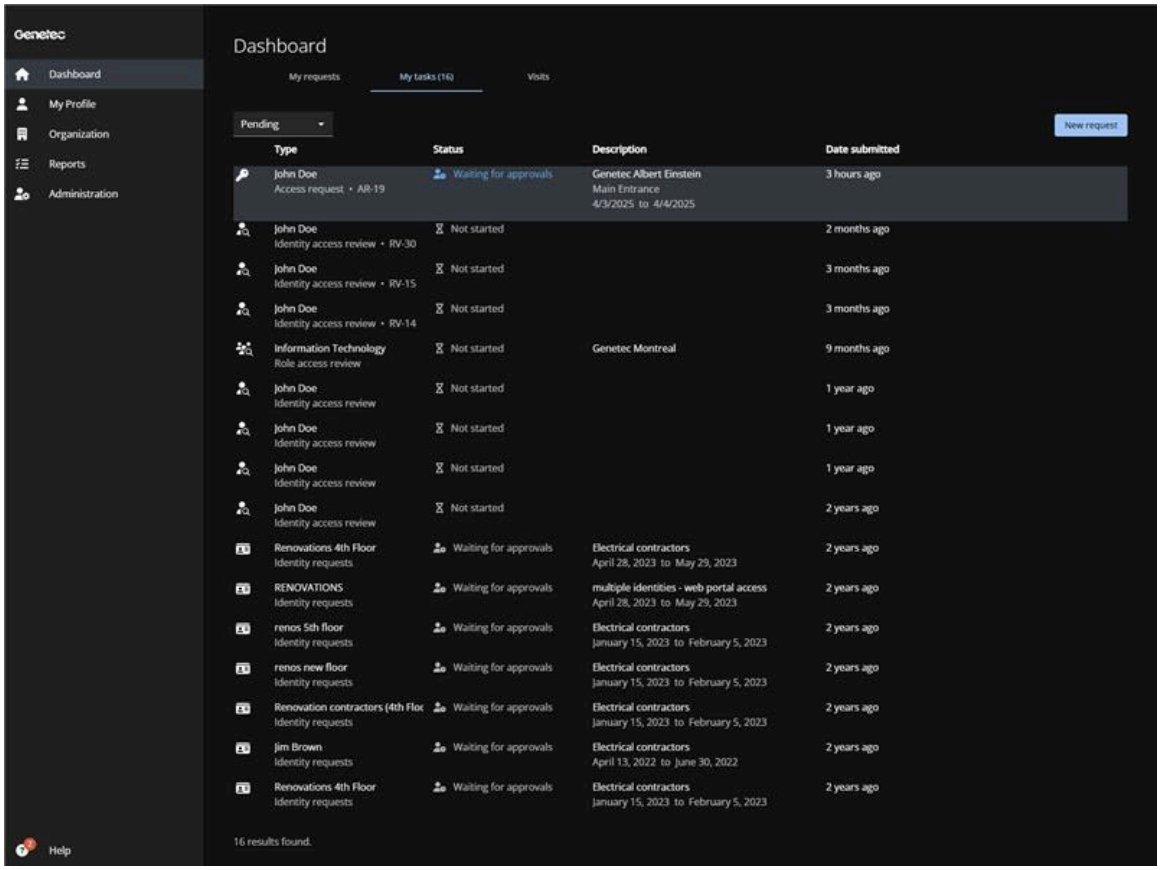
Ensure that some area access requests have already been submitted.

What you should know

Only *Area owners*, *Area managers*, or supervisors can approve area access requests.

Procedure

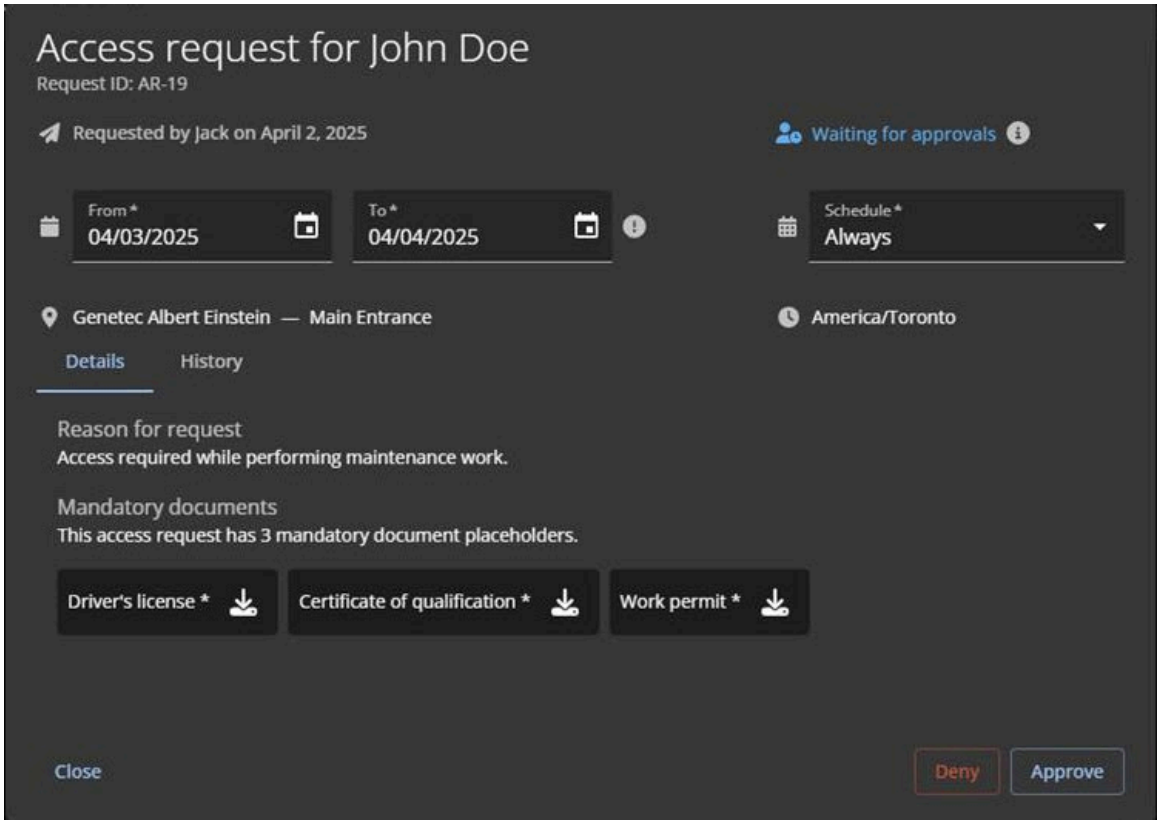
1 Click **Dashboard** > **My tasks**.



2 From the **Status** list, filter the tasks that are displayed:

- **Status:** Select a status from the following:
  - **All:** Displays all pending or completed tasks.
  - **Pending:** Displays tasks waiting for approval.
  - **Completed:** Displays completed tasks and their status. For example, approved, completed, denied, or canceled.

3 Click an access request to display additional details about the request.



4 Review the request details and make any changes that you require.

TIP: You can modify the request if the request has an error or something that needs to change. For example, you can amend the dates due to an office closure, or amend the schedule to a more appropriate access schedule.

5 (Optional) In the **History** field, enter a comment about any changes you make to the access request.

6 Click **Approve**.

7 (Optional) In the **Reason for approval** field, enter a reason for the access approval.

8 Click **Confirm**.

The area access requests are now approved. Employees or visitors are able to access the area during the periods specified in their access requests.

Rejecting area access requests

To reject area access requests, an *Area owner*, *Area manager*, or a *Supervisor* must review the pending approvals. They can then decide which requests to deny.

Before you begin

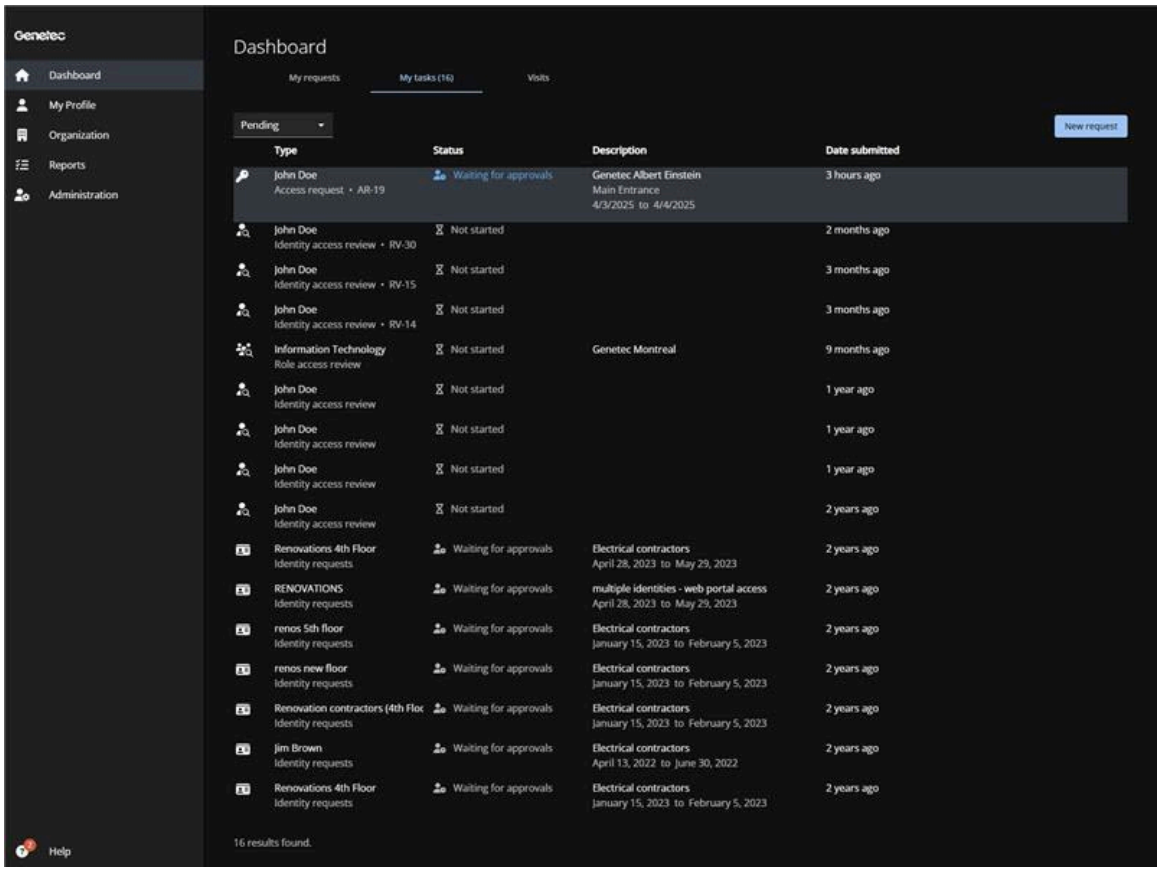
- Ensure that some area access requests have already been submitted.
- Review area access to identify access that is no longer required.

What you should know

Only *area owners*, *area managers*, or supervisors can reject area access requests.

Procedure

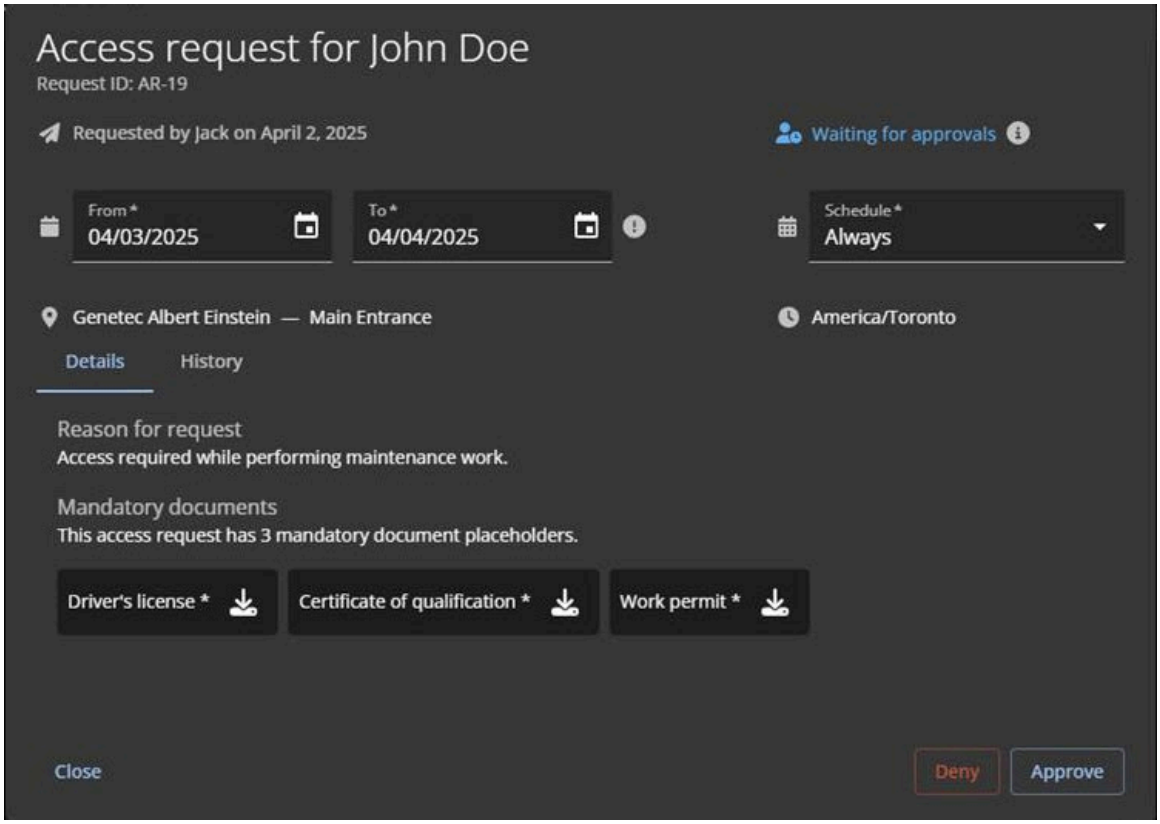
1 Click **Dashboard** > **My tasks**.



2 From the **Status** list, filter the tasks that are displayed:

- **Status:** Select a status from the following:
  - **All:** Displays all pending or completed tasks.
  - **Pending:** Displays tasks waiting for approval.
  - **Completed:** Displays completed tasks and their status. For example, approved, completed, denied, or canceled.

3 Click an access request to display additional details about the request.



4 Review the request details.

5 (Optional) In the **History** field, enter a comment about any changes you make to the access request.

6 Click **Deny**.

7 (Optional) In the **Reason for denial** field, enter the reason why the access request was denied.

NOTE: If the supporting access request documents are incorrect or not valid, you can notify the requester by including this information in the **Reason for denial** field. The requester will then have to resubmit an access request with valid supporting documents.

8 Click **Confirm**

The area access requests are now rejected. Employees or visitors are no longer able to access the area.

9

Managing visitors

Learn how to manage visit requests and access requests.

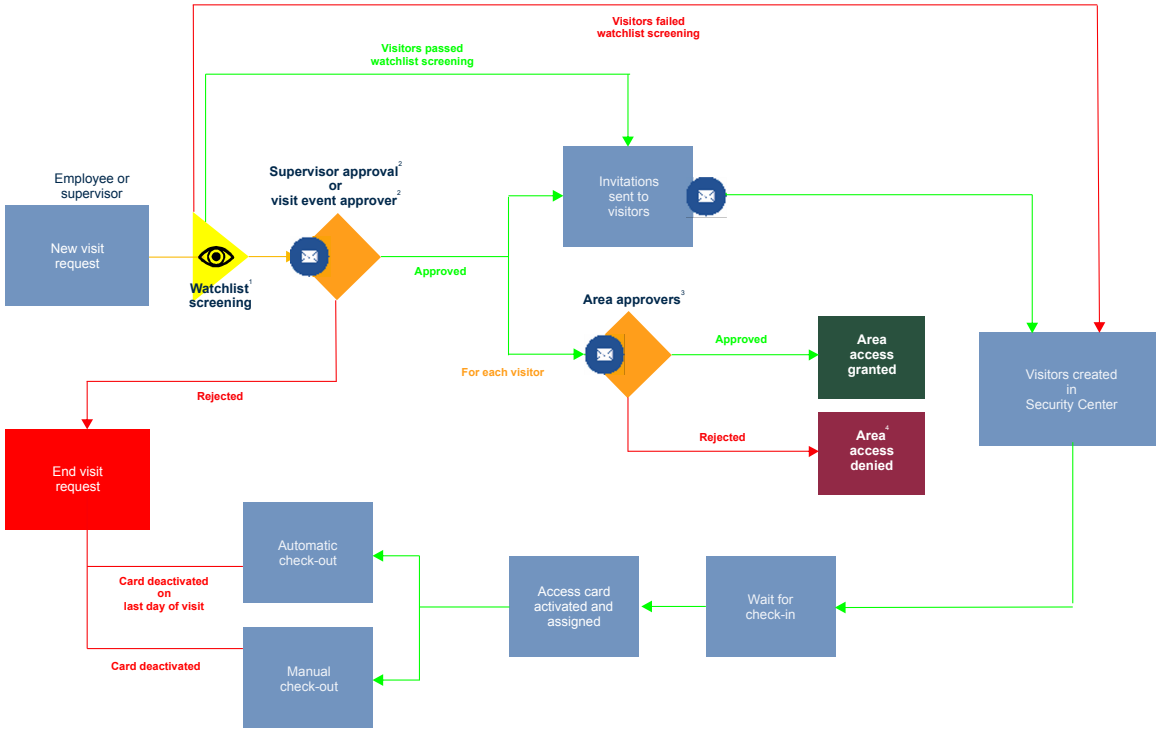
This section includes the following topics:

About visit request workflow

A visit request workflow is a series of activities performed by the system or authorized people during the life cycle of a visit request. The activities can change the state and properties of visit requests, affect other entities in the system, or wait for conditions to be met.

The workflow helps automate visit request tasks, such as approving or rejecting access requests, so that people involved in the review and approval process can focus on other tasks.

The following diagram illustrates the *visit request workflow* that occurs in Genetec ClearID™ and Synergis™.



[1] (Optional) For more information, see Visit request watchlist workflow.

[2] (Optional) Approval can be enabled or disabled for each site.

[3] (Optional) Approval can be enabled or disabled for each area.

[4] Visit event has been created and visitor has been created in Security Center but area access has been denied. Visitor might be able to access denied areas if escorted by a host, this access exception is at the discretion of the organization.

Related Topics

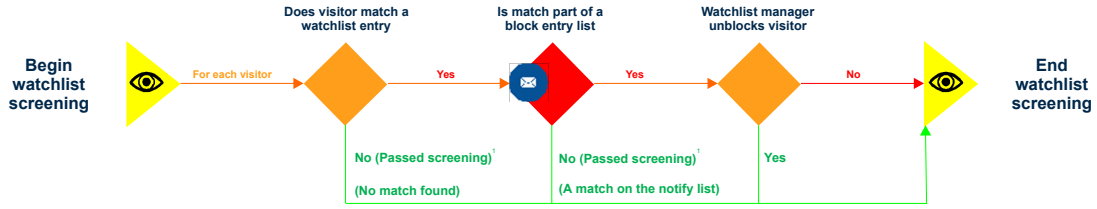
About workflows on page 12

About visit request watchlist workflow

A watchlist workflow is a series of activities performed by the system or authorized people during the life cycle of a visit request if watchlists are enabled. The activities can change the state and properties of watchlists, affect other entities in the system, or wait for conditions to be met.

The workflow helps automate screening visitors for persons or companies of interest during a self-service check-in or a self-registration, so that people involved in the review and approval process can focus on other tasks.

The following diagram illustrates the *watchlist workflow* that occurs (if the watchlist function is enabled for your account) in Genetec ClearID™ and Synergis™ in parallel with the visit request workflow.



[1] Visitor registration is only confirmed after screened visitors are not found in any block entry watchlists. Any visitors that are blocked do not receive a visit notification email.

Related Topics

About workflows on page 12

Inviting visitors

To invite one or more guests for a site visit or event, use the self-service portal. Using a self-service portal with area managers specified simplifies the approval process, and avoids interrupting a chain of people who might or might not be the correct approvers.

Before you begin

1. Familiarize yourself with workflows.
2. Enable visitor management for your site.
3. Ensure that you have the required permissions to invite visitors to the site.

What you should know

You can add visitors individually or import a large list of visitors using a CSV file.

- If you have fewer than five visitors to invite, add your visitors individually.
- If you have more than five visitors to invite, prepare a CSV file to import your visitor list.
- If your identity home site is configured, you are automatically granted access to invite visitors to that site only if the site visitor management options have been configured to allow people to invite visitors.
- The options displayed when creating a visitor invite can vary depending on the site settings and settings configured for visitor management.

NOTE: Mandatory fields are highlighted in the user interface with an asterisk (*).

Procedure

1 Log on to the self-service portal.

2 Do one of the following:

- Click **Dashboard** > **My requests** > **New request** > **Invite visitors**.
- Click **Dashboard** > **Visits** > **New visit event**.

3 In the *New visit event* wizard, follow the prompts to complete the wizard for one of the following situations:

- Invite visitors manually
- Invite visitors using a CSV import

4 Click **Finish**.

Your visit request has been submitted and is waiting for the required approvals.

Example

After you finish

Confirm whether the request was approved or rejected:

- Check your email for a *Visit approved* email.
- Check **My requests** in Genetec ClearID™.

Related Topics

Enabling visitor management for sites on page 247
Visitor Management Feature Note (2 pages)

Inviting visitors manually

If you have fewer than five visitors to invite to your event, you can add your visitors manually.

Before you begin

1. Familiarize yourself with workflows.
2. Enable visitor management for your site.
3. Ensure that you have the required permissions to invite visitors to the site.

What you should know

- If your identity home site is configured, you are automatically granted access to invite visitors to that site. Access is only automatically granted if the options for site visitor management have been configured to allow people to invite visitors.
- The options displayed when inviting visitors can vary depending on the site settings and settings configured for visitor management.

NOTE: Mandatory fields are highlighted in the user interface with an asterisk (*).

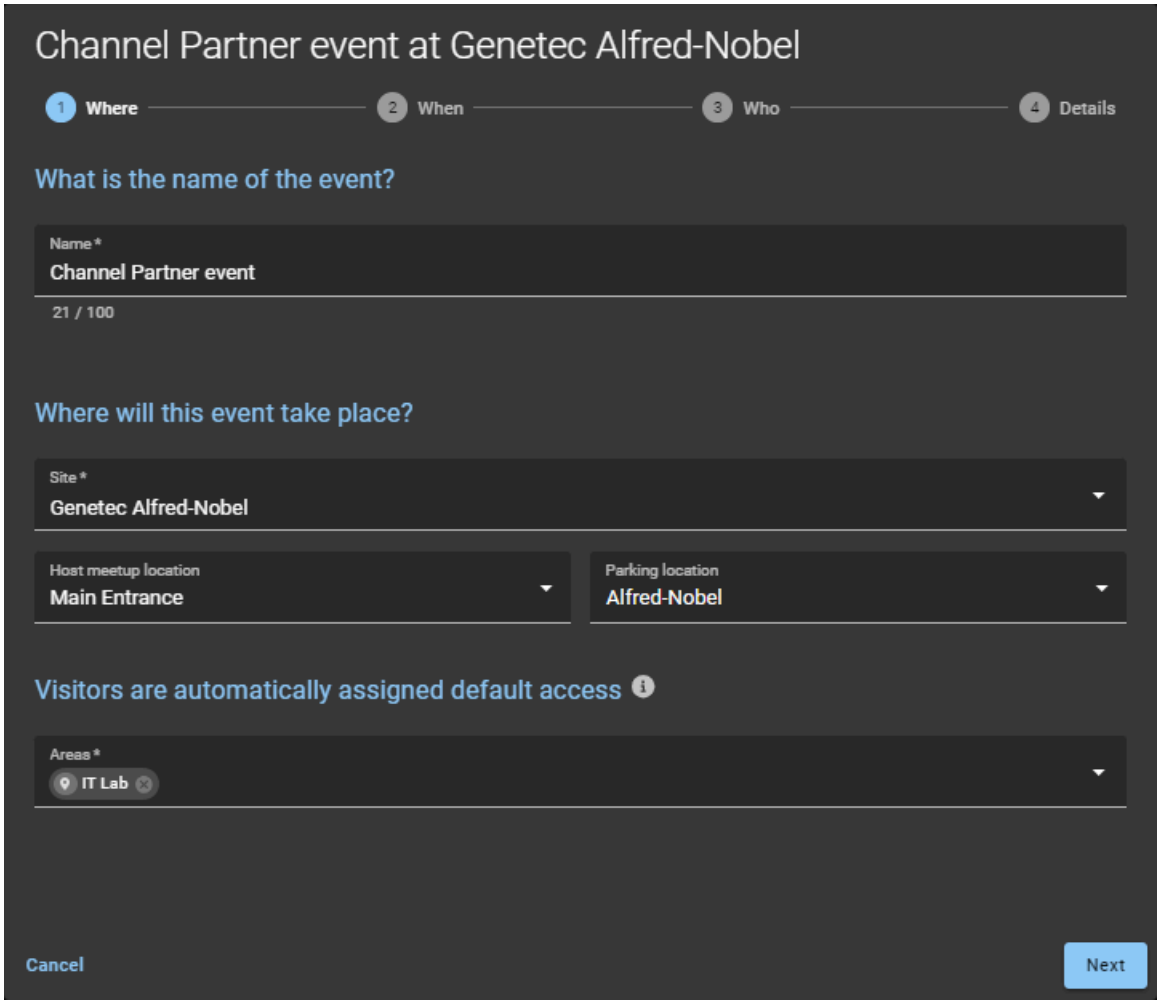
Procedure

1 Log on to the self-service portal.

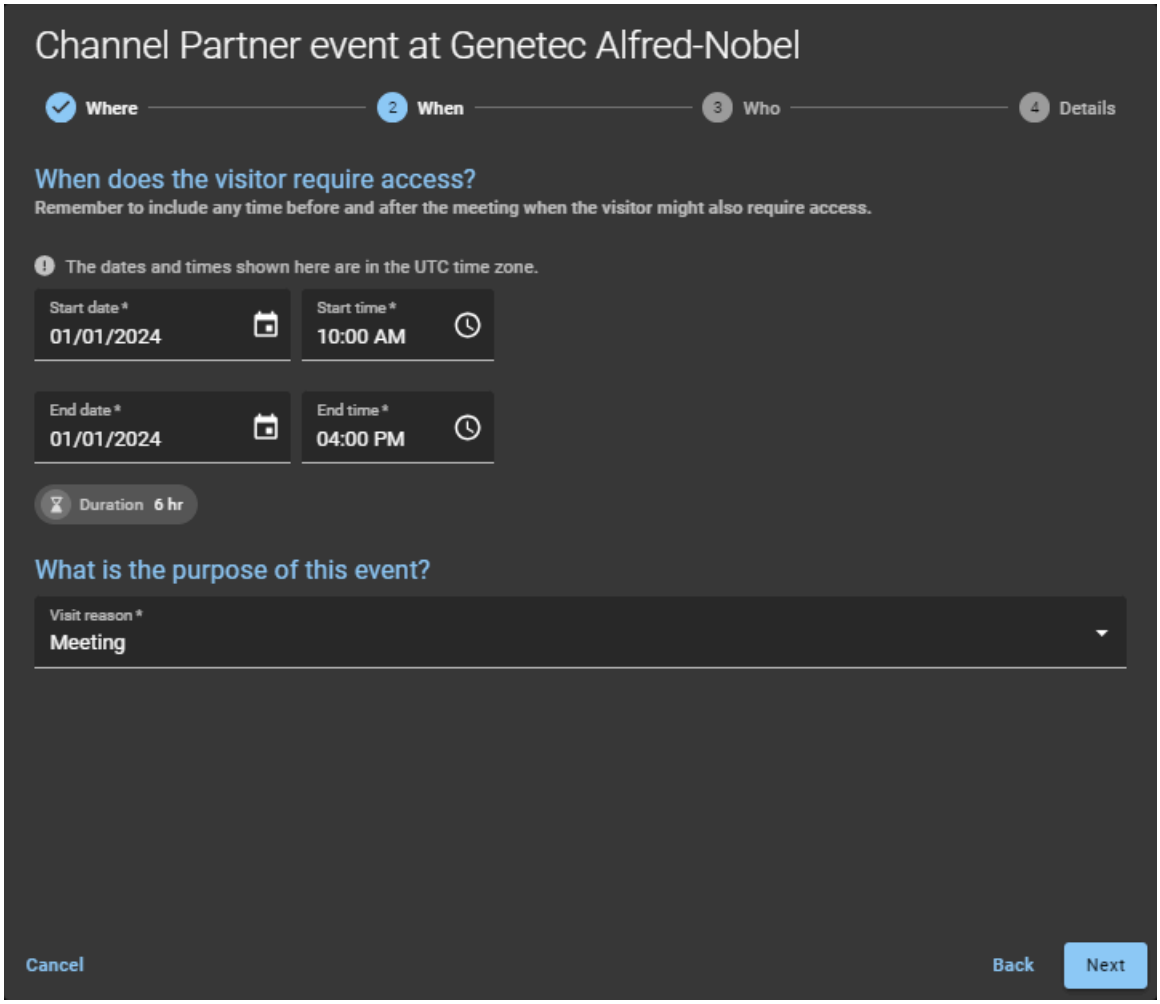
2 Do one of the following:

- Click **Dashboard** > **My requests** > **New request** > **Invite visitors**.
- Click **Dashboard** > **Visits** > **New visit event**.

3 In the *New visit event* wizard, enter or select details about *where* the event will take place.

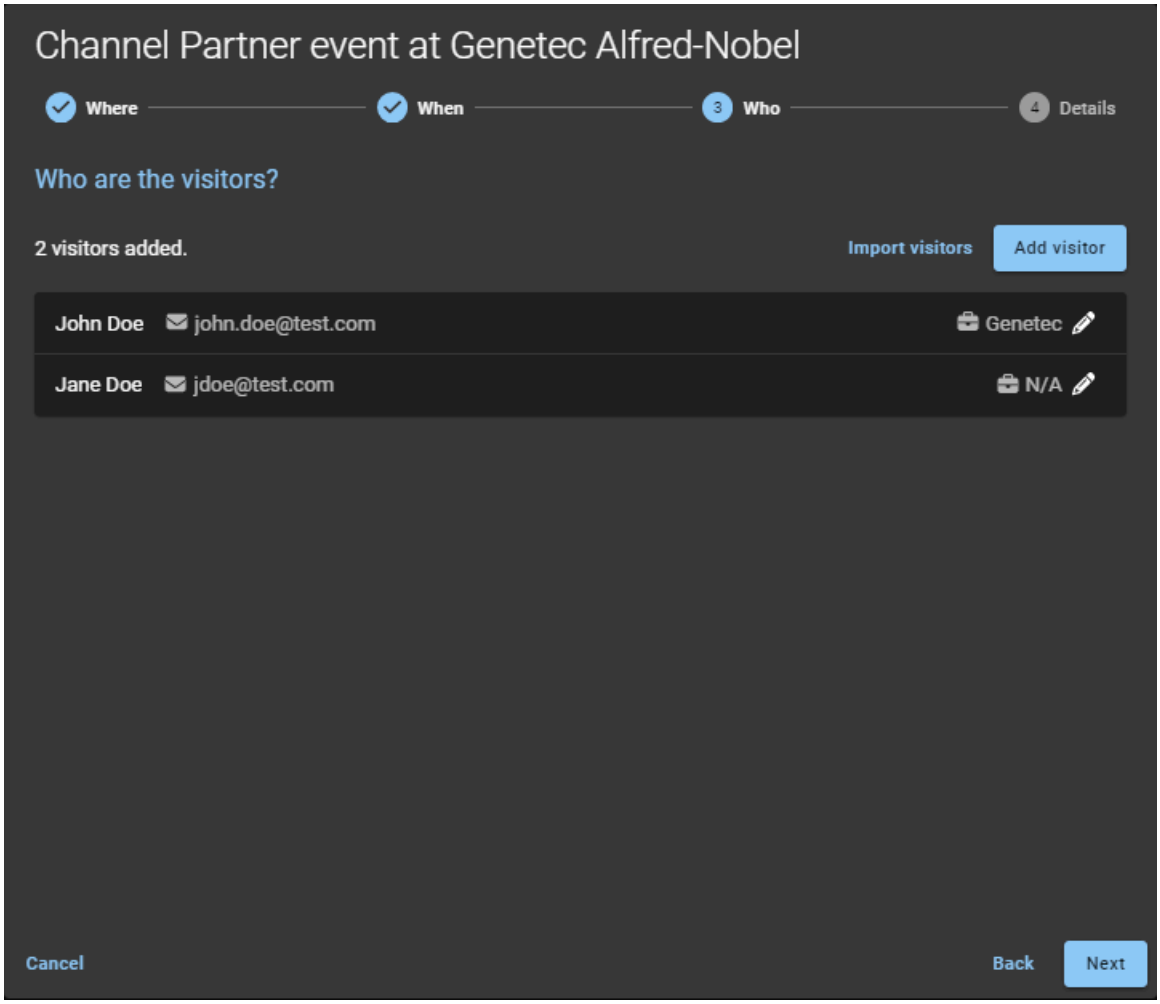


4 Enter or select details about *when* the event takes place and the purpose of the event.



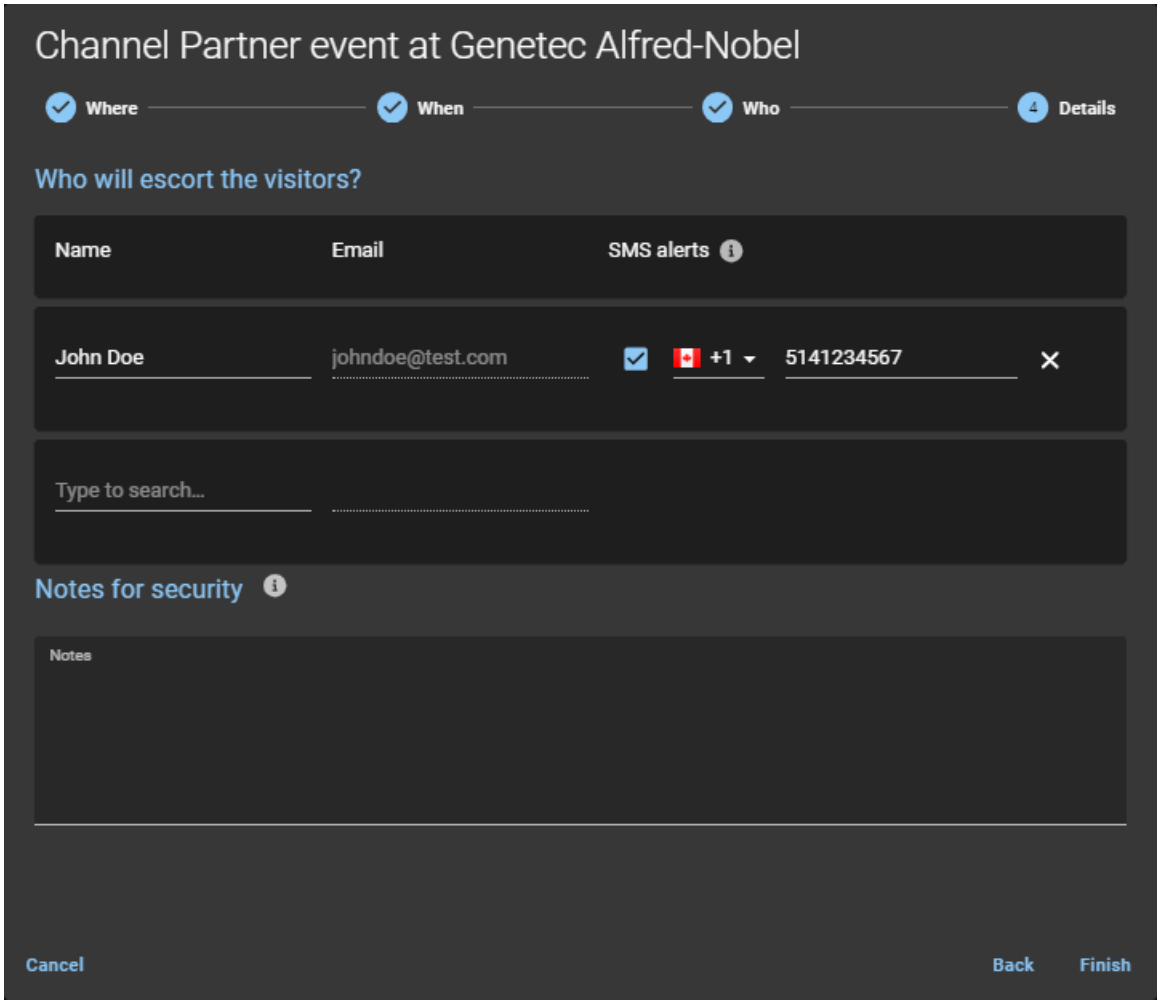
TIP: Remember to include time before and after the visitor event or meeting when the visitor might also require access.

5 Enter or select details about *who* to invite to the event.



a) Click **Add visitor** and complete the fields.
b) Click **Save**.
c) Repeat for each additional visitor.

6 Complete *details* about the event.



- **Name:** The name of the visitor event host.
- **Email:** The email address for the visitor event host.
- **SMS:** Enter a mobile phone number to send SMS alert notifications to visitor hosts when the visitor checks in.
  - **NOTE:** Use the search field to add more visitor hosts. You can add up to 10 visitor hosts.
- **(Optional) Notes for security:** Add notes about the visitor, the visit invite, or the visit event.

7 Click **Finish**.

Your visit request has been submitted and is waiting for the required approvals.

Example

After you finish

Confirm whether the request was approved or rejected:

- Check your email for a *Visit approved* email.
- Check **My requests** in ClearID.

Related Topics

SMS alerts on page 371
About email notifications on page 180
Visitor Management Feature Note (2 pages)

Inviting visitors using a CSV import

If you have more than five visitors to invite to your event, you can use a CSV file import to populate your visitor list.

Before you begin

1. Familiarize yourself with workflows.
2. Enable visitor management for your site.
3. Ensure that you have the required permissions to invite visitors to the site.

What you should know

- If your identity home site is configured, you are automatically granted access to invite visitors to that site. Access is only automatically granted if the options for site visitor management have been configured to allow people to invite visitors.
- The options displayed when inviting visitors can vary depending on the site settings and settings configured for visitor management.

TIP: When you **Import visitors**, a sample CSV file provided by the system can be used. The columns in the sample CSV file match the settings in the site configuration. You can then complete the visitor details values in the CSV file and import all visitors in one click. For example, importing 500 people to a site visit or customer event.

NOTE: Mandatory fields are highlighted in the user interface with an asterisk (*).

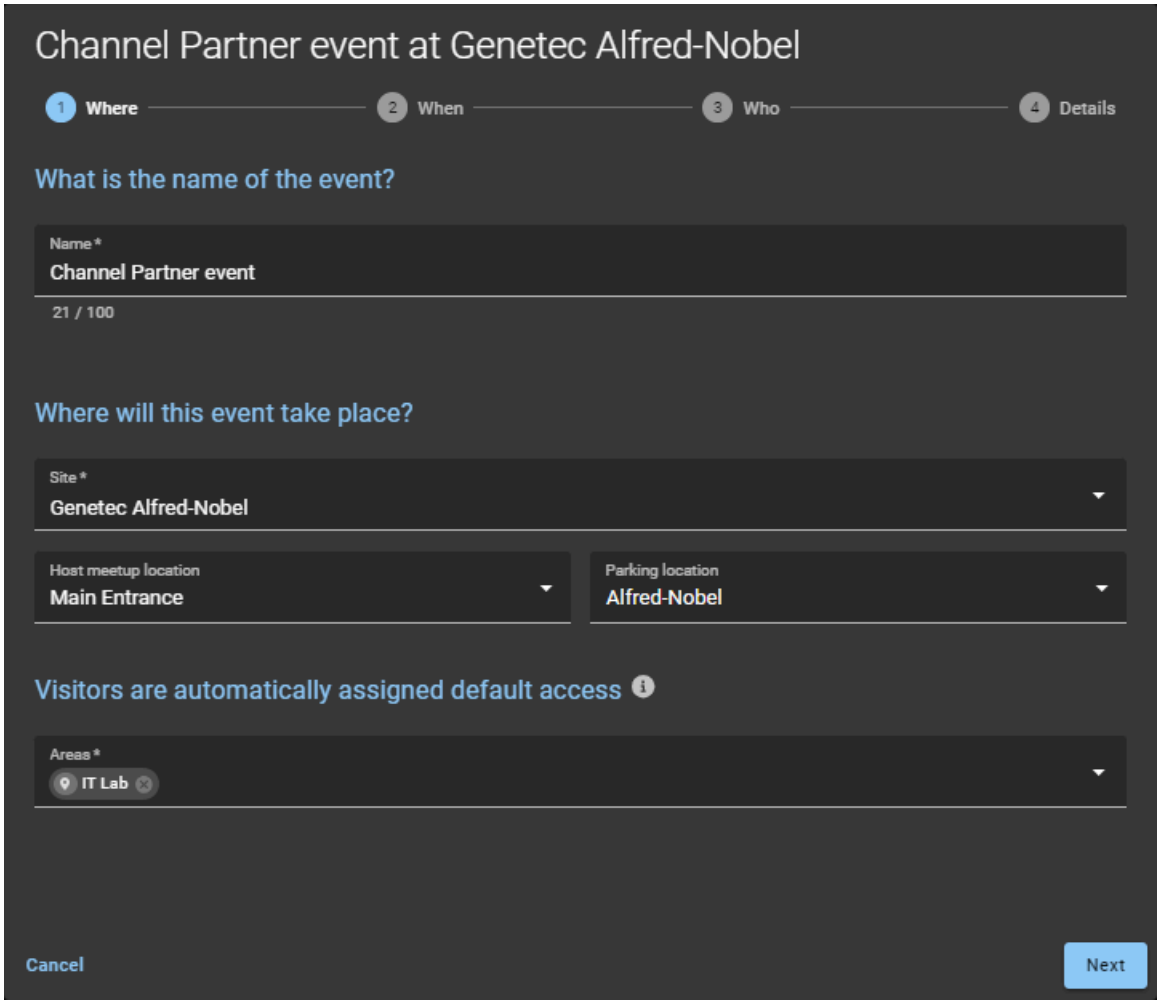
Procedure

1 Log on to the self-service portal.

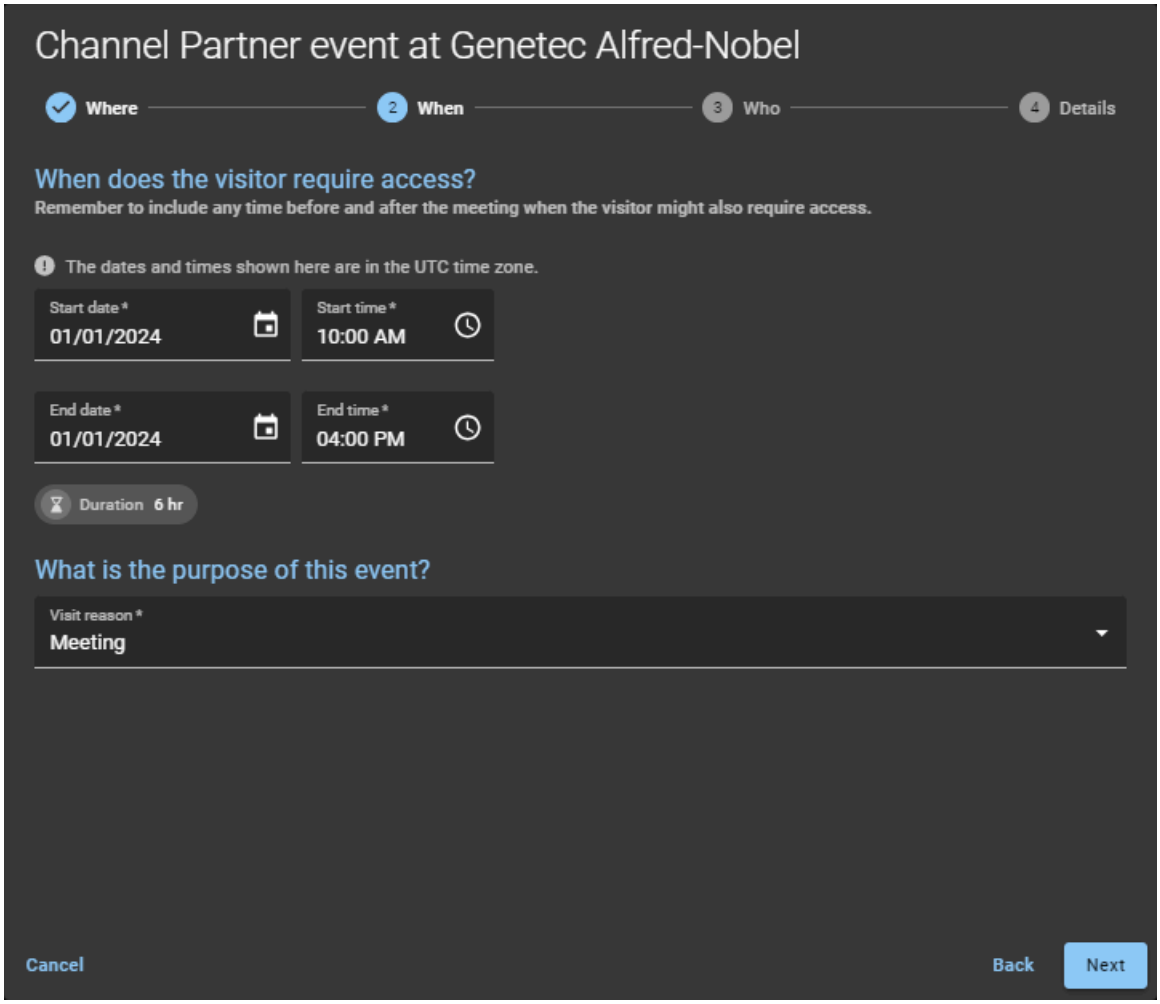
2 Do one of the following:

- Click **Dashboard** > **My requests** > **New request** > **Invite visitors**.
- Click **Dashboard** > **Visits** > **New visit event**.

3 In the *New visit event* wizard, enter or select details about *where* the event will take place.

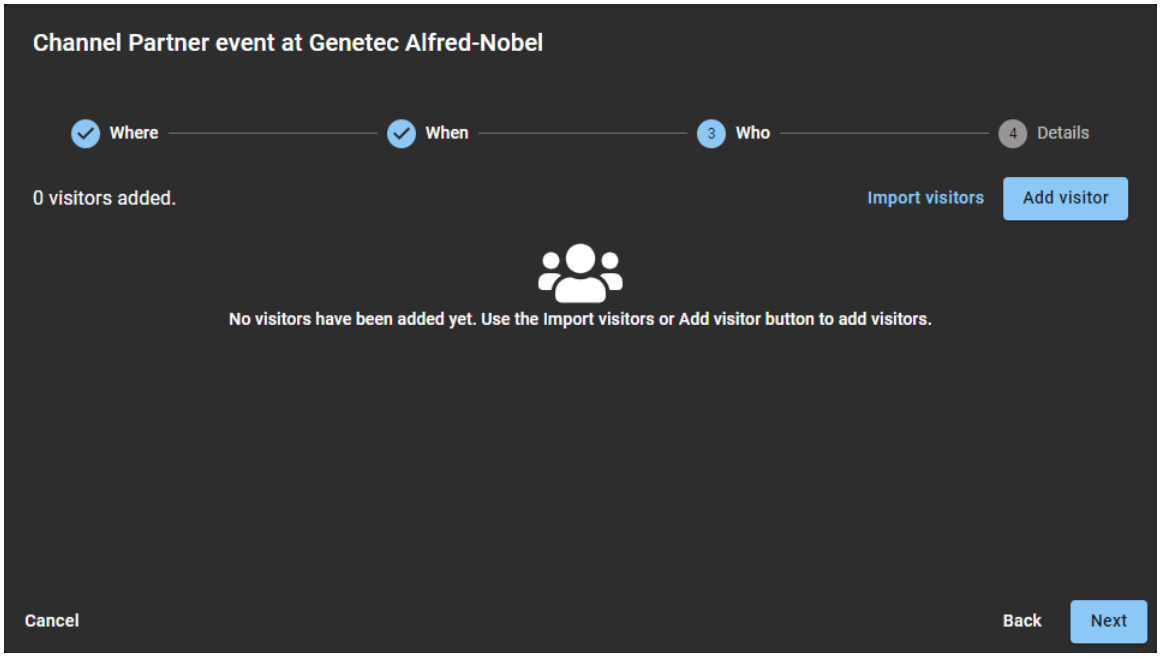


4 Enter or select details about *when* the event will take place and the purpose of the event.



TIP: Remember to include time before and after the visitor event or meeting when the visitor might also require access.

5 Prepare to import *who* you want to invite to the event.

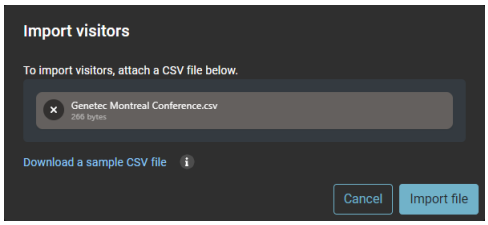


a) In the *Who will attend this event?* section, click **Import visitors** and then choose one of the following:

- Use an existing CSV file.
- Download a sample CSV file.

6 If you chose to use an existing CSV file, do the following:

a) Drag and drop an existing CSV file containing the customers you want to invite or click **Browse** to select the file you require.



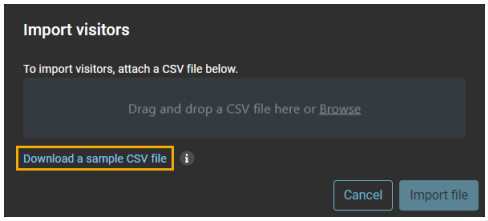
b) Click **Import file** to import the visitor list.

c) Click **Confirm** to complete the import.

d) (Optional) Click **Edit** ( ) to modify any visitor details and click **Save** to confirm the update.

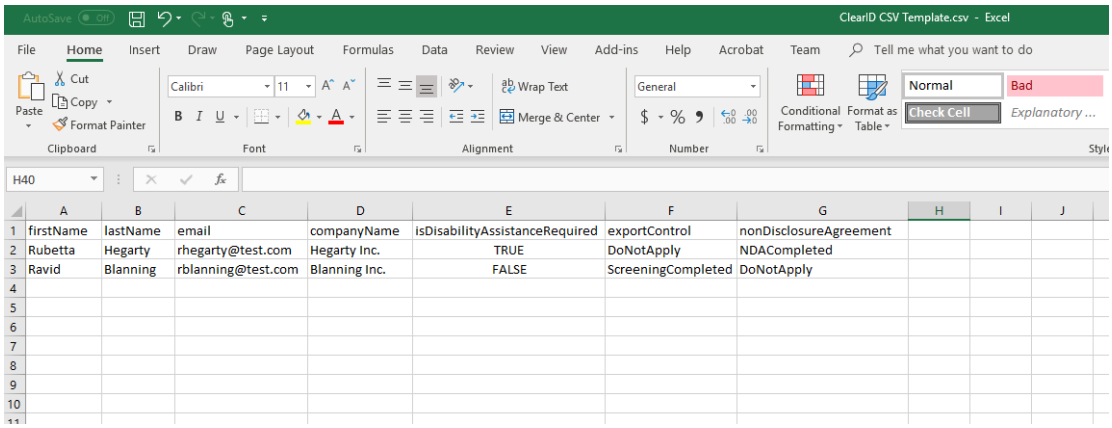
7 If you chose **Download a sample CSV file**, do the following:

a) Click **Download a sample CSV file**.



b) Select and open the downloaded CSV file.

c) For each visitor, complete a row of visitor information in the CSV template file.



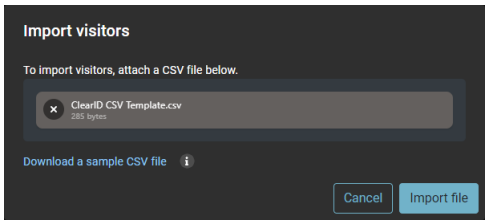
	A	B	C	D	E	F	G	H	I	J
1	firstName	lastName	email	companyName	isDisabilityAssistanceRequired	exportControl	nonDisclosureAgreement			
2	Rubetta	Hegarty	rhegarty@test.com	Hegarty Inc.	TRUE	DoNotApply	NDACompleted			
3	Ravid	Blanning	rblanning@test.com	Blanning Inc.	FALSE	ScreeningCompleted	DoNotApply			
4										
5										
6										
7										
8										
9										
10										

NOTE: The columns in the CSV template can vary depending on the settings in your site configuration.

d) Save the visitor list as a CSV file.

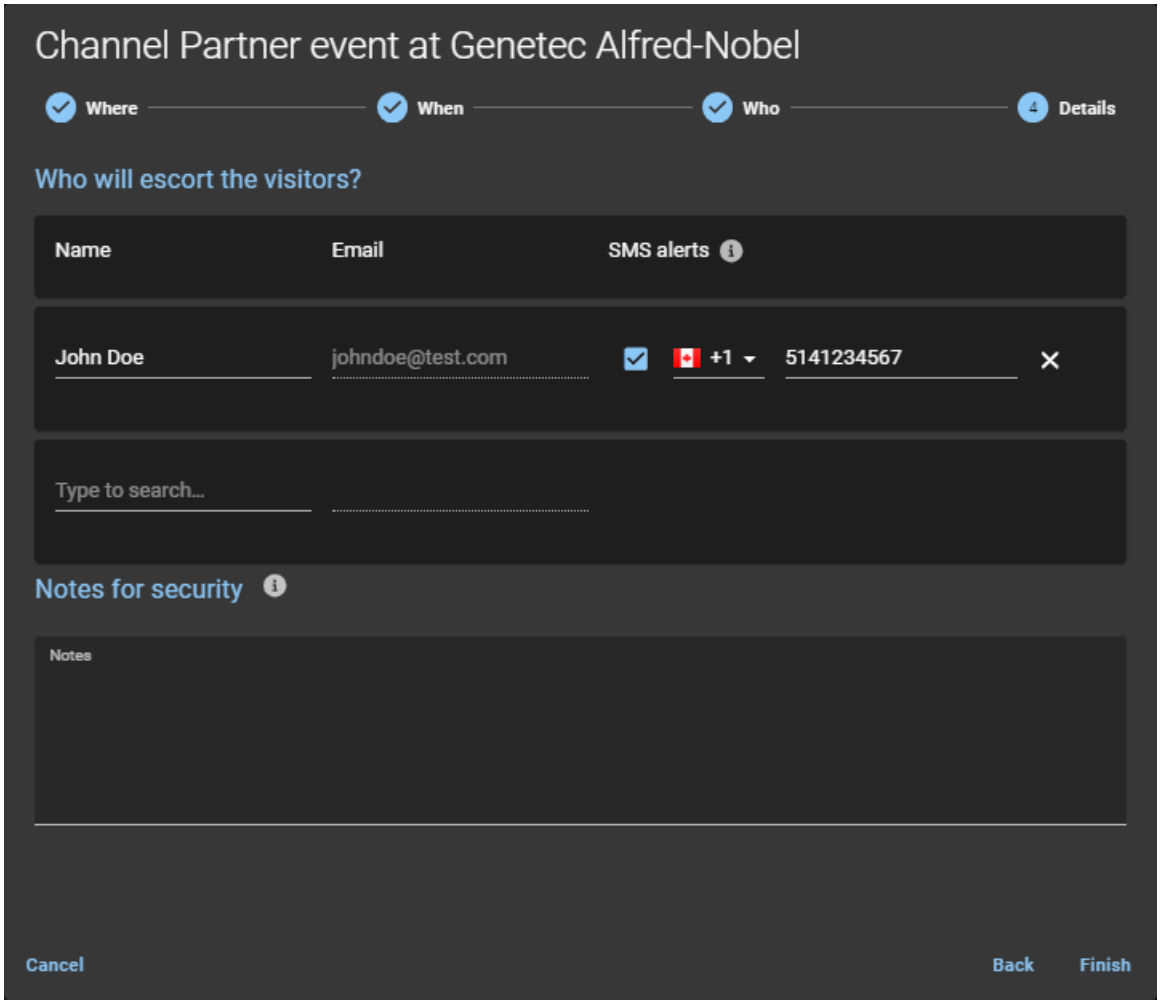
e) Return to the *Import visitors* dialog, to drag and drop or click **Browse** to select the file you created.

f) Click **Import File** to import the visitor list.



g) Click **Confirm** to complete the import.

8 Complete *details* about the event.



- **Name:** The name of the visitor event host.
- **Email:** The email address for the visitor event host.
- **SMS:** Enter a mobile phone number to send SMS alert notifications to visitor hosts when the visitor checks in.
  - **NOTE:** Use the search field to add more visitor hosts. You can add up to 10 visitor hosts.
- **(Optional) Notes for security:** Add notes about the visitor, the visit invite, or the visit event.

9 Click **Finish**.

Your visit request has been submitted and is waiting for the required approvals.

Example

After you finish

Confirm whether the request was approved or rejected:

- Check your email for a *Visit approved* email.
- Check **My requests** in ClearID.

Related Topics

SMS alerts on page 371
About email notifications on page 180
Visitor Management Feature Note (2 pages)

SMS alerts

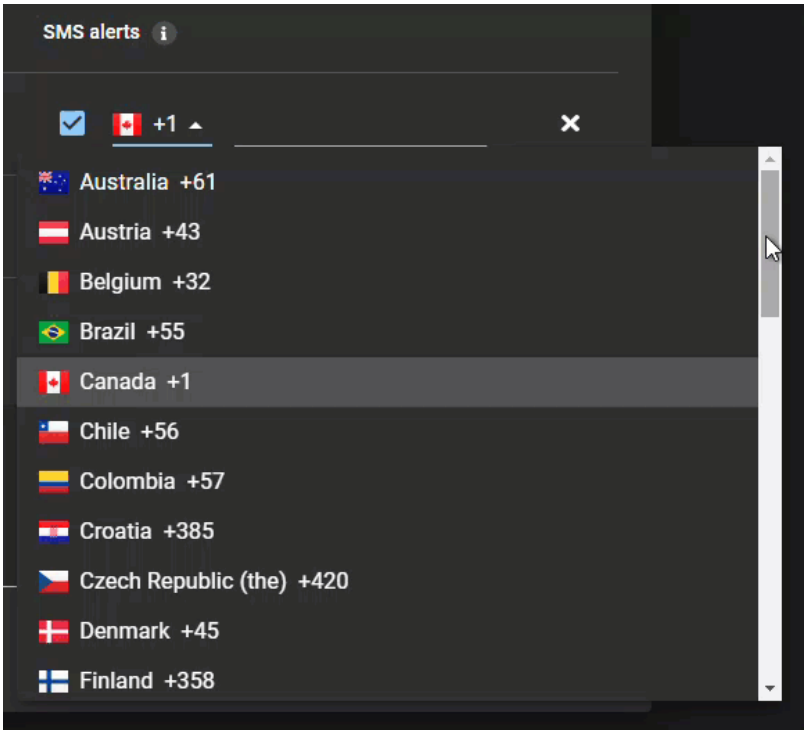
In Genetec ClearID™, SMS alerts are used in the visit event wizard to automatically send notifications to visitor hosts to inform them when visitors check-in.

SMS alerts for visitor check-in are supported for the following countries:

Country	Country code
Austria	+43
Australia	+61
Belgium	+32
Brazil	+55
Canada	+1
Chile	+56
Columbia	+57
Croatia	+385
Czech republic (the)	+420
Denmark	+45
Finland	+358
France	+33
Germany	+49
Greece	+30
Iceland	+354
India	+91
Ireland	+353
Italy	+39
Japan	+81
Luxembourg	+352

Country	Country code
Malaysia	+60
Mexico	+52
Monaco	+377
Netherlands	+31
Norway	+47
Peru	+51
Philippines (the)	+63
Portugal	+351
Romania	+40
Singapore	+65
Spain	+34
Sweden	+46
Switzerland	+41
Taiwan (Province of China)	+886
Thailand	+66
United Kingdom of Great Britain and Northern Ireland (the)	+44
United States of America (the)	+1
Vietnam	+84

Example



Related Topics

Inviting visitors manually on page 360
Inviting visitors using a CSV import on page 365

Reviewing visit events

Area owners, security, and reception can review current or upcoming visits or events for their areas. Visits can be requested for hosting other site employees, maintenance contractors, appointments, meetings, interviews, customer visits, business partner conferences, and so on.

What you should know

Only *area owners*, security, or reception can review visits.

Procedure

1 Click **Dashboard** > **Visits**.

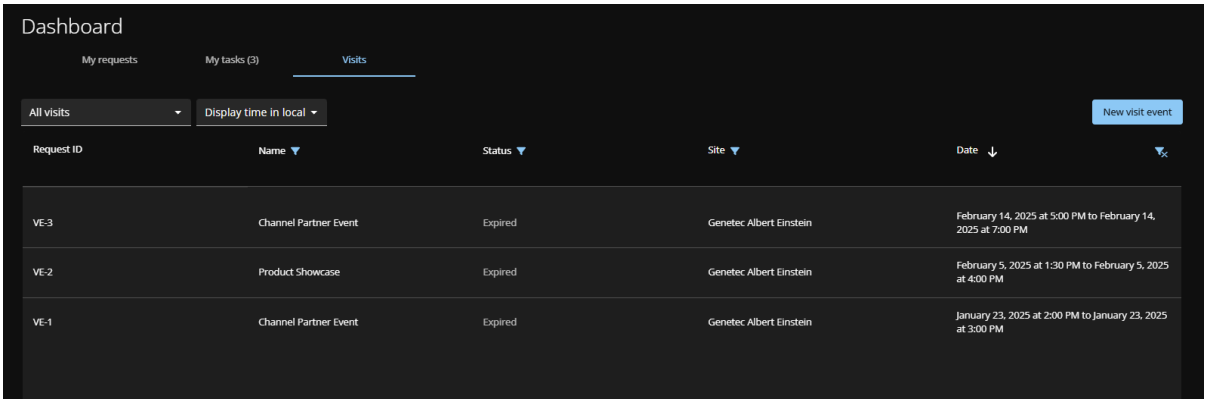
2 Select the options that you require.

- **Current and upcoming visits:** Displays current and upcoming visits. By default, 10 visits are displayed and you can click **Load more** to display the next 10 visits.
- **Past visits:** Displays past visits. By default, 10 past visits are displayed and you can click **Load more** to display the next 10 past visits. You can find past visits that occurred in the last year.
- **All visits:** Displays all visits. By default, 10 visits are displayed and you can click **Load more** to display the next 10 visits.

3 (Optional) Use the column filters to refine the list of visits.

- **Name:** In the **Name** field, enter your search criteria. Only search results for visits that contain the entered word in the visit name are displayed. For example, if you enter `training`, only visits with names that include the word *training* are displayed in the search results.
- **Status:** Select a filter from the **Status** list to filter results for the visit request state:
  - Submitted
  - Waiting for approvals
  - Approved
  - Canceled
  - Denied
  - Expired
- **Site:** Select a site from the **Site** list.
- **Date:** Sort the visits by date in ascending or descending order.

The visits matching your selections are displayed.



After you finish

Copy a visit event.

Related Topics

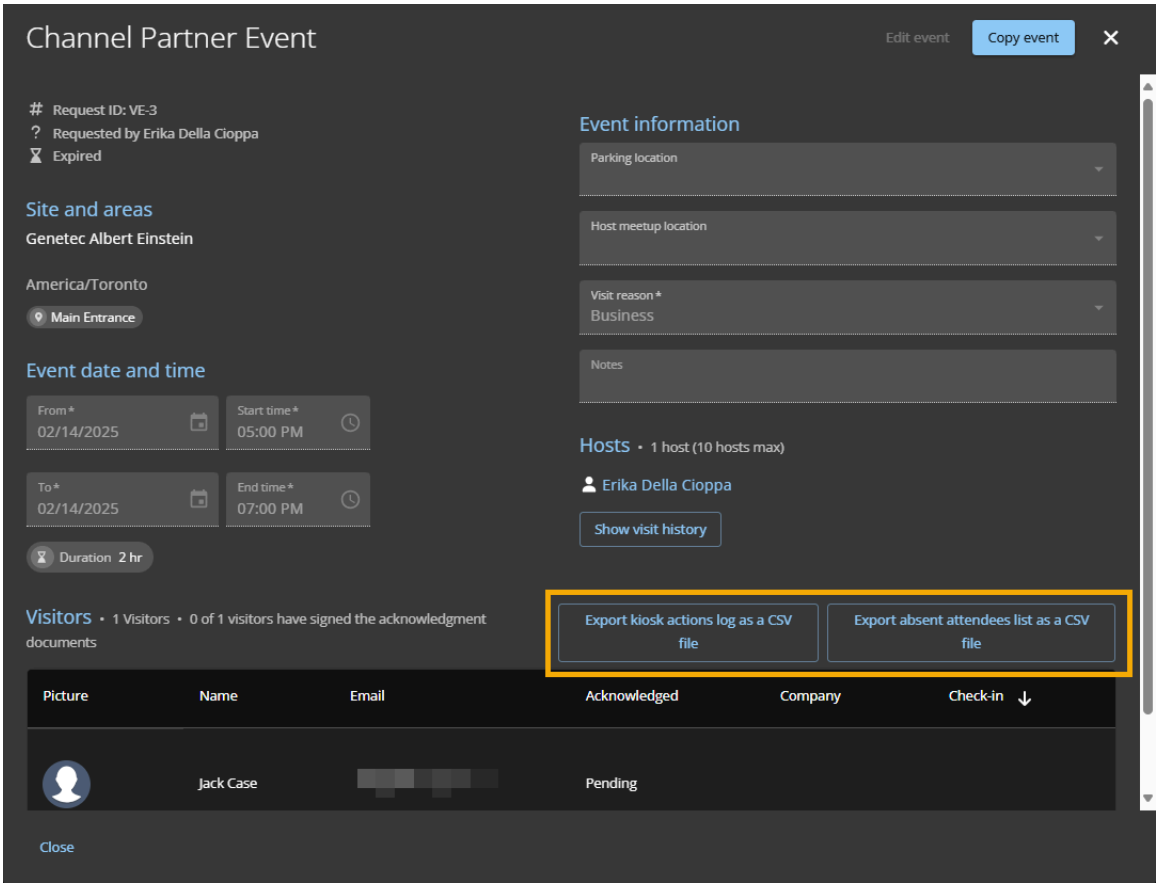
About visit event logs on page 376

About visit event logs

In Genetec ClearID™, *Account administrators*, *Site owners*, requesters, and hosts can use visit event logs to audit events and identify absentees. These logs show detailed records of operator and visitor actions on check-in devices, as well as invited guests who didn't check in.

ClearID organizes visit data into two logs:

- Kiosk actions log
- Absent attendees list



Kiosk actions log

The kiosk actions log contains information about actions performed at activated Self-Service Kiosk iPads and Mobile Operator Check-In iPhones during a visit event. Each time a device scans a visitor's QR code or a visitor checks into the visit event, an entry is entered in the log.

The exported *.CSV* file contains columns with identifying data for each kiosk action:

- **Timestamp:** The time and date when the kiosk action was performed.
- **Action type:** The type of kiosk action performed at a Self-Service Kiosk or with a Mobile Operator Check-In device. This column contains **Scan** when a device scans a QR code, and **CheckIn** when the visitor check-in process is complete.
- **Visit event ID:** The identification number assigned to the visit event in the ClearID portal.
- **Visitor ID:** The identification number assigned to the visitor associated with the visit event in the ClearID portal.
- **Visitor email:** The email of the visitor associated with the visit event.

- **Registration code:** The visitor QR code value associated with the visit event.
- **Device object ID:** The identification number assigned to the device that performed the scan or check-in during the visit event.

Absent attendees list

The absent attendees list contains information about visitors who were invited to the event but didn't check in. The list can be used to identify absent attendees, allowing hosts to follow up as needed.

The exported *.CSV* file contains columns with identifying data for each absent attendee:

- **Visitor email:** The email of the visitor flagged as an absent attendee.
- **Visit event name:** The name assigned to the visit event.
- **Visitor ID:** The identification number assigned to the visitor in the ClearID portal.
- **Visit event ID:** The identification number assigned to the visit event in the ClearID portal.

Related Topics

Viewing visit event logs on page 378
Reviewing visit events on page 374

Viewing visit event logs

To audit operator and visitor actions on check-in devices during visit events, and review lists of absent attendees, you can export the logs of each event from the Genetec ClearID™ portal.

Before you begin

Invite visitors and review your visit events.

What you should know

You must be an *Account administrator*, *Area owner*, requester, or host to view visit event logs.

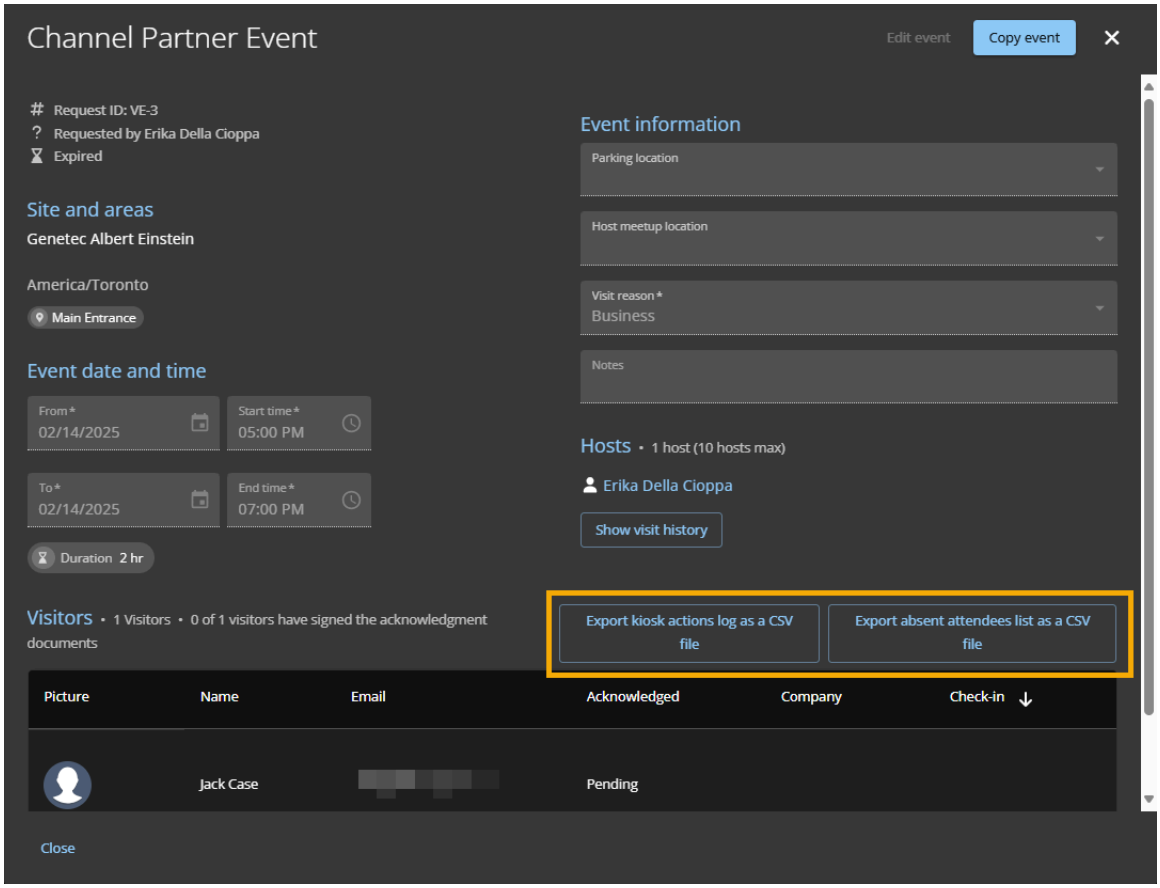
Procedure

1 From the dashboard, go to **Visits**.

2 From the visit type filter, select **All visits**.

NOTE: By default, 10 visits are displayed. You can click **Load more** to display the next 10 visits.

3 Select the event for which you want to audit visit logs.

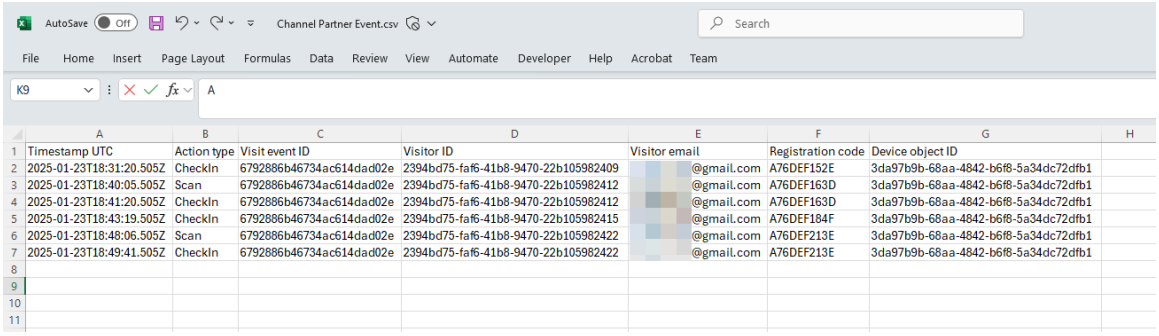


a) Click **Export kiosk actions log as CSV file** to download a log of actions performed on visitor management devices during the event.

b) Click **Export absent attendees list as CSV file** to download a list of visitors who didn't check in to the visit event.

Example

The visit event log is downloaded as a *.CSV* file. By default, the exported file is created using the visit event name. For example, *Channel Partner Event.csv* or *Channel Partner Event-absentees.csv*.



	A	B	C	D	E	F	G	H
1	Timestamp UTC	Action type	Visit event ID	Visitor ID	Visitor email	Registration code	Device object ID	
2	2025-01-23T18:31:20.505Z	CheckIn	6792886b46734ac614dad02e	2394bd75-faf6-41b8-9470-22b105982409	@gmail.com	A76DEF152E	3da97b9b-68aa-4842-b6f8-5a34dc72dfb1	
3	2025-01-23T18:40:05.505Z	Scan	6792886b46734ac614dad02e	2394bd75-faf6-41b8-9470-22b105982412	@gmail.com	A76DEF163D	3da97b9b-68aa-4842-b6f8-5a34dc72dfb1	
4	2025-01-23T18:41:20.505Z	CheckIn	6792886b46734ac614dad02e	2394bd75-faf6-41b8-9470-22b105982412	@gmail.com	A76DEF163D	3da97b9b-68aa-4842-b6f8-5a34dc72dfb1	
5	2025-01-23T18:43:19.505Z	CheckIn	6792886b46734ac614dad02e	2394bd75-faf6-41b8-9470-22b105982415	@gmail.com	A76DEF184F	3da97b9b-68aa-4842-b6f8-5a34dc72dfb1	
6	2025-01-23T18:48:06.505Z	Scan	6792886b46734ac614dad02e	2394bd75-faf6-41b8-9470-22b105982422	@gmail.com	A76DEF213E	3da97b9b-68aa-4842-b6f8-5a34dc72dfb1	
7	2025-01-23T18:49:41.505Z	CheckIn	6792886b46734ac614dad02e	2394bd75-faf6-41b8-9470-22b105982422	@gmail.com	A76DEF213E	3da97b9b-68aa-4842-b6f8-5a34dc72dfb1	
8								
9								
10								
11								

Related Topics

About visit event logs on page 376

Copying a visit event

You can copy a visit event to take advantage of reusable information in a recurring visit or visit events that include a large number of participants.

Before you begin

Review visit events.

What you should know

- Any user can copy their visits to create a similar visit.
- Use the **Copy event** function when you have recurring visits or a visit that includes a large number of participants. For example, one of the following situations:
  - Repeat visitors
  - A meeting that has the same or similar attendees as a previous meeting
  - Monthly customer visits
  - A yearly business partner conference

Procedure

1 Click **Dashboard** > **Visits**.

2 Click the visit event that you want to copy.

3 Click **Copy event**.

A copy of the visit event is created.

4 Modify the visit event as required and click **Save**.

For example: changing the event details, changing dates, adding or removing visitors, adding or removing hosts, or amending notifications.

The new visit event is created and a *Visit created* email notification is sent to all visitors and hosts.

Modifying visit events

From time to time, you might want to modify a visit event to change the event details, or to add or remove visitors or hosts. Updating the visit event details ensures that your visitors are always kept up to date following any changes to an upcoming event.

Before you begin

Create your visit events in Genetec ClearID™ by doing one or more of the following:

- Inviting visitors manually on page 360
- Inviting visitors using a CSV import on page 365

What you should know

- Visit events can only be modified before the start of the visit event.
- Any modifications to a visit event are highlighted in the updated email notifications sent to relevant recipients.
- If visit event approval is enabled, any modifications to a visit event that are not **Reason** field modifications generate approval notifications for the relevant approvers to re-approve any changes or additions.
- Changing an existing visitor or host email to a different email triggers a cancellation notification for the original email and a visit event notification for the newly updated email.
- If visit event approval is enabled, changing a visitor name or host name details does not trigger email notifications for visitors, but does trigger the approval workflow again.

Procedure

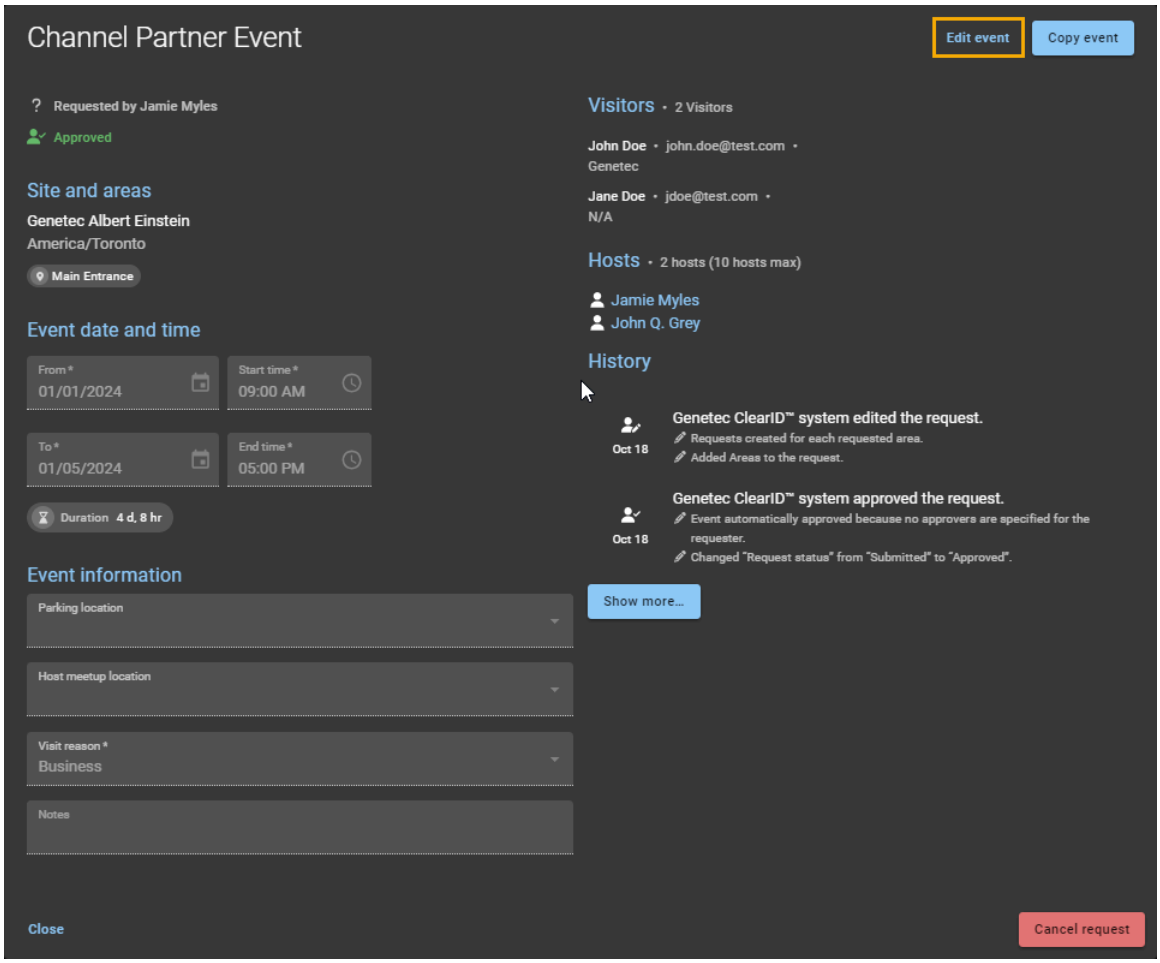
1 Click **Dashboard** > **Visits**.

2 (Optional) If the list is long, use the drop-down menus and column filters to refine the results.

- **Name:** Enter a search criteria to search for the visit event by name.
- **Status:** Select one or more status filters to search for the visit event using the event status.
- **Site:** Start typing to find a site or select a site from the **Site** list.
- **Date:** In the **Date** column, use the ascending ( ) or descending ( ) controls to adjust the order of the results.

3 Click a visit event and review the event details to verify it is the event that you want to modify.

4 Click **Edit event**.



5 Modify one or more of the following as required:

a) In the **Name** field, modify the name.[1]

b) In the *Event date and time* section, modify the start or end date and time.[1]

c) In the *Event information* section, modify the parking location, host meetup location, or notes.[1]

Visit event **Visit reason** modifications do not trigger any approval notifications because the reason has no impact on visitors attending the event.

d) In the *Visitors* section, add, modify, or remove visitors.

Any changes to visitors are assessed again to verify any watchlist screening criteria.

e) In the *Hosts* section, add, modify, or remove hosts.

NOTE: [1]Modifying the **Name**, **Event date and time**, or **Event information** does not trigger re-approval (if approvals are applicable).

6 Click **Save** to confirm your changes.

After you finish

Review your visit event details to verify that the changes are correct.

Approving visit event requests

To modify or approve visit requests, *Visit event approvers* must review the pending approvals and then decide which requests to approve.

Before you begin

Enable visitor management for sites.

What you should know

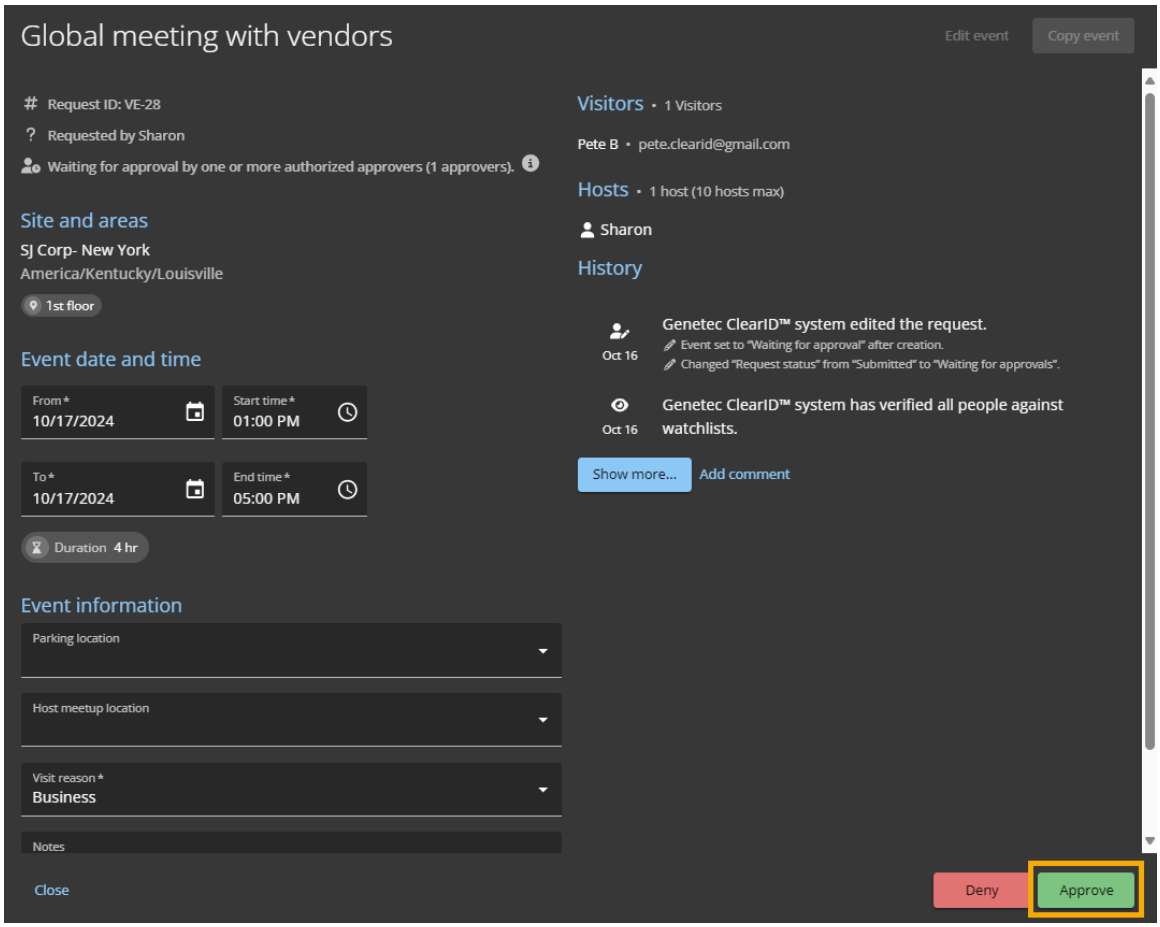
When a visit request is submitted, the specified *Visit event approvers* receive an email notification.

Procedure

1 To view the details of a request for approval or denial, click **Approve** in the visit request email
You're redirected to the Genetec ClearID™ portal where you're prompted to sign in.

2 Review the request details and make any required changes.

TIP: You can modify the request if the request has an error or something that needs to change. For example, you can amend the dates due to an office closure, or amend the parking location to a more appropriate location.



a) (Optional) Click **Show more...** to view the history of changes made to the visit request.

b) (Optional) Click **Add comment** to add notes to the history of the visit request. For example, you can add notes explaining why you changed the date and time of the visit.

3 Click **Approve**.

a) (Optional) In the **Reason for approval** field, enter a reason for the visit approval.

b) Click **Confirm**.

TIP: To view a list of all pending approvals, go to **Dashboard** > **My tasks** and select **Pending** from the list.

A confirmation email is sent to the visitor outlining the details of their visit.

About visitors report

In Genetec ClearID™, a visitors report is a list of current or upcoming visits, or visits that occurred in the past for a specific site. The report includes information about visitor name, event requester, event name, expected arrival, check-in, check-out, and watchlist status.

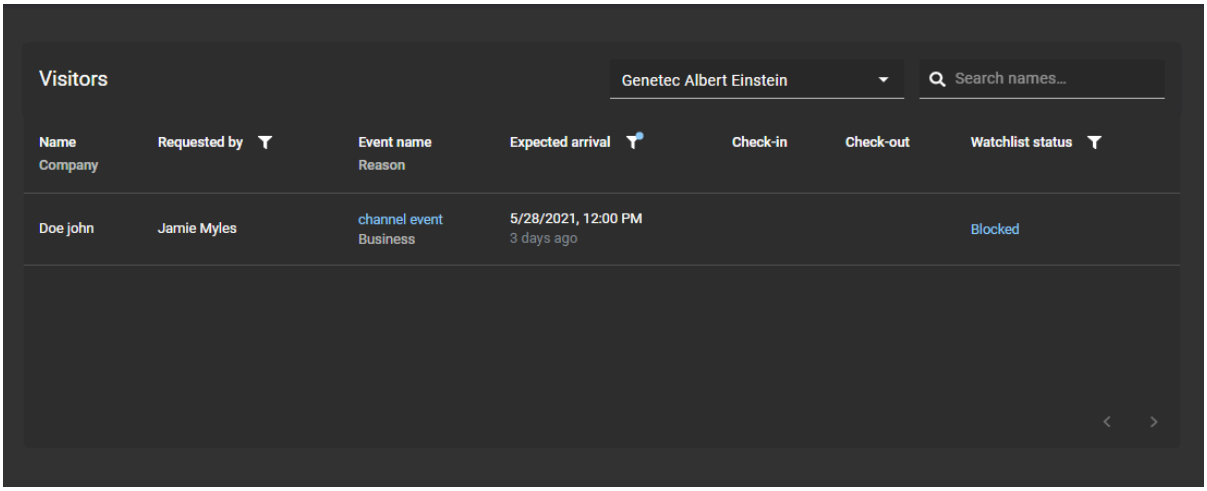


Figure 10: Visitors report

The visitors report is used by *site owners* and *watchlist managers* to check current or upcoming visits, or visits that occurred in the past and also to provide information to auditors.

Filters can be used to help refine the report search results by event requester, expected arrival, and watchlist status.

Related Topics

Viewing a visitors report on page 386

Viewing a visitors report

You can view a visitors report for any current or upcoming visits, or visits that occurred in the past. The report results are specific to a site, and can be filtered using event requester, expected arrival, and watchlist status.

Before you begin

Invite your visitors.

What you should know

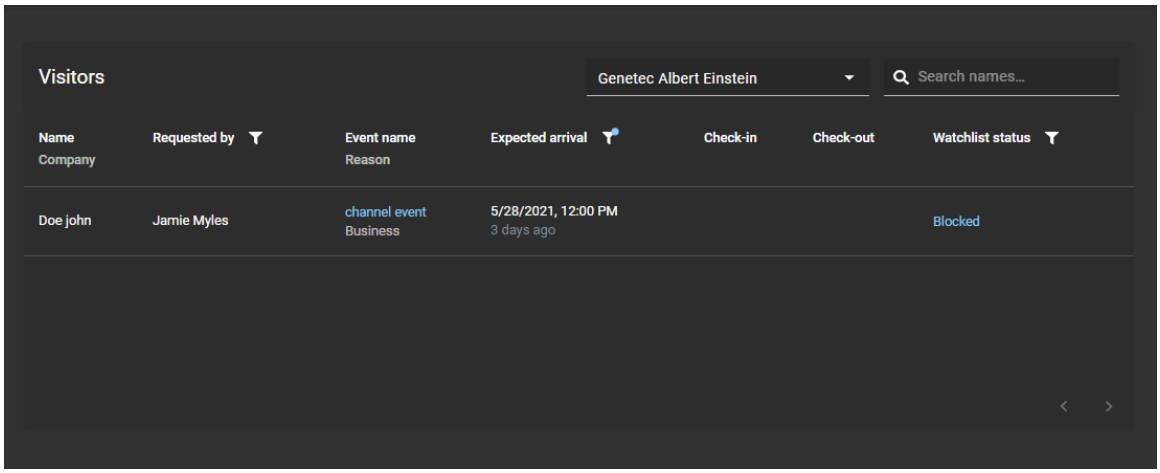
- *Site owners* and *watchlist managers* can view the visitors report.
- Only watchlist managers can unblock or allow blocked visitors.

NOTE: For customers who have not purchased a watchlist license, the **Watchlist status** column is present in the report but displays N/A because no watchlist data is available.

Procedure

1 From the homepage, click **Reports** > **Visitors**.

2 Select a site from the **Site** list.



3 (Optional) Enter a name in the search box.

4 (Optional) Click the **Requested by** filter icon and enter a visit requesters name.

5 (Optional) Click the **Expected arrival** filter icon and select an expected arrival option:

- Current and upcoming visits
- A day ago
- 7 days ago
- 30 days ago
- 90 days ago
- All past events

TIP: If no visitors are displayed, select a longer **Expected arrival** filter to increase the filtered results that are displayed.

6 (Optional) Click the **Watchlist status** filter icon and select one or more checkbox options:

- **Allowed:** The visitor did not match any block list entries during the watchlist screening process and was allowed access to visit the site.
- **Blocked:** The visitor matched one or more block list entries during the watchlist screening process and was blocked from visiting the site.
- **Unblocked:** The visitor matched one or more block list entries during the watchlist screening process but was allowed access to visit the site by the watchlist manager.
- **In progress:** Visitor watchlist screening is in progress.
- **Notified:** The visitor matched one or more notify list entries during the watchlist screening process. The watchlist manager was notified and the visitor was allowed access to the site.

a) (Optional) Click the **Blocked** hyperlink to open the **Visitor watchlist alert** dialog. From this dialog, a watchlist manager can allow entry if required.

b) (Optional) Click the information icon next to an unblocked watchlist status for more information about who unblocked the visitor.

7 (Optional) Click to reset filter selections and return to the visitors list.

Related Topics

Unblocking visitors blocked by a watchlist on page 453
About visitors report on page 385

QR codes as a credential for visitors

Genetec ClearID™ can use QR codes as a credential for visitors to simplify access to parking entrance barriers, turnstiles, or gated facilities.

The following third-party vendor QR code solutions are currently supported:

- Qscan barcode readers
- STid QR code readers

Visitors can use a QR code as a credential to open parking entrance barriers, turnstiles, or gated facilities:

- The QR code contained in a visitor confirmation email can be presented using a smartphone.
- The visitor confirmation email can also be printed and used for check-in.
- SMS messages notify hosts when their visitors arrive (if the check-in notification function is enabled).

Related Topics

Supported devices on page 77

Importing a custom card format (QR code credential) in Synergis

Before you can use QR codes as a credential in Genetec ClearID™, you must configure Synergis™ to support the ClearID QR code custom card format. A QR code can then be used as a credential to access parking entrances, turnstiles, or gated facilities.

Before you begin

- Install the ClearID plugin
- Make sure that the Visitor Management module is activated in your Security Center Synergis License.

What you should know

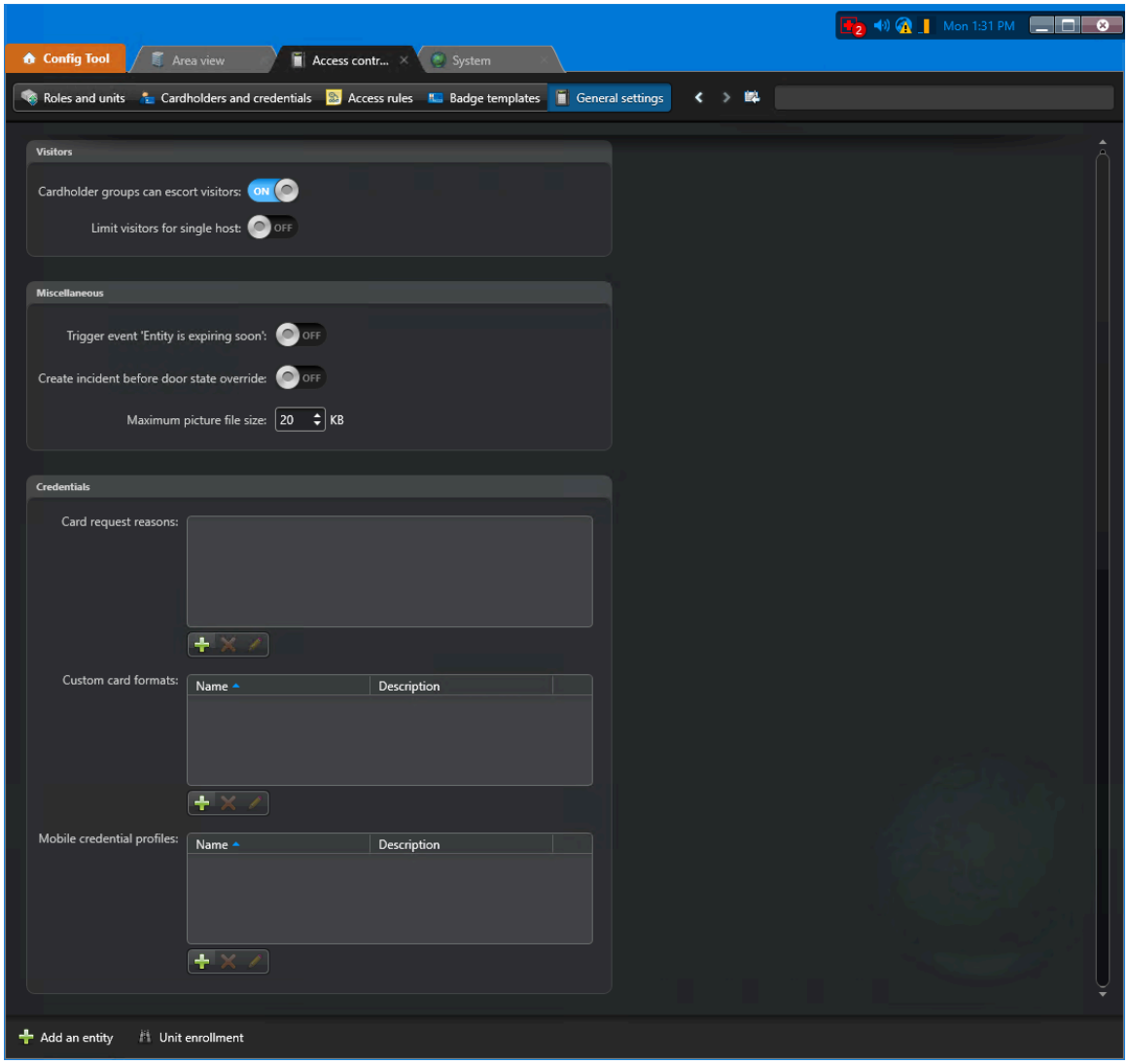
Only Security Center administrators or users with the *modify credential properties* privilege can import the custom card format.

The SDK and ClearID Plugin do not automatically create the custom card format for QR codes.

IMPORTANT: The custom card format is found on the Security Center machine where the ClearID plugin is installed.

Procedure

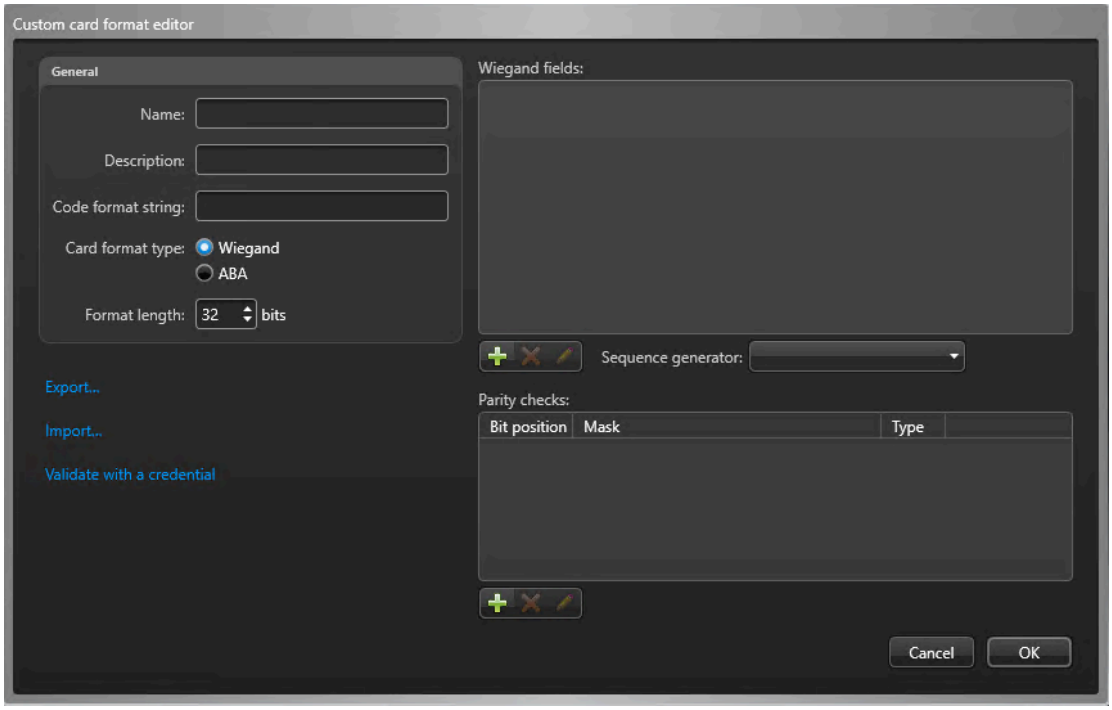
1 In Config Tool, open the *Access control* task and select the **General settings** view.



2 In the *Custom card formats* section of *Credentials*, click **Add an item** ( ).

a) Download this QRcode.xml file.

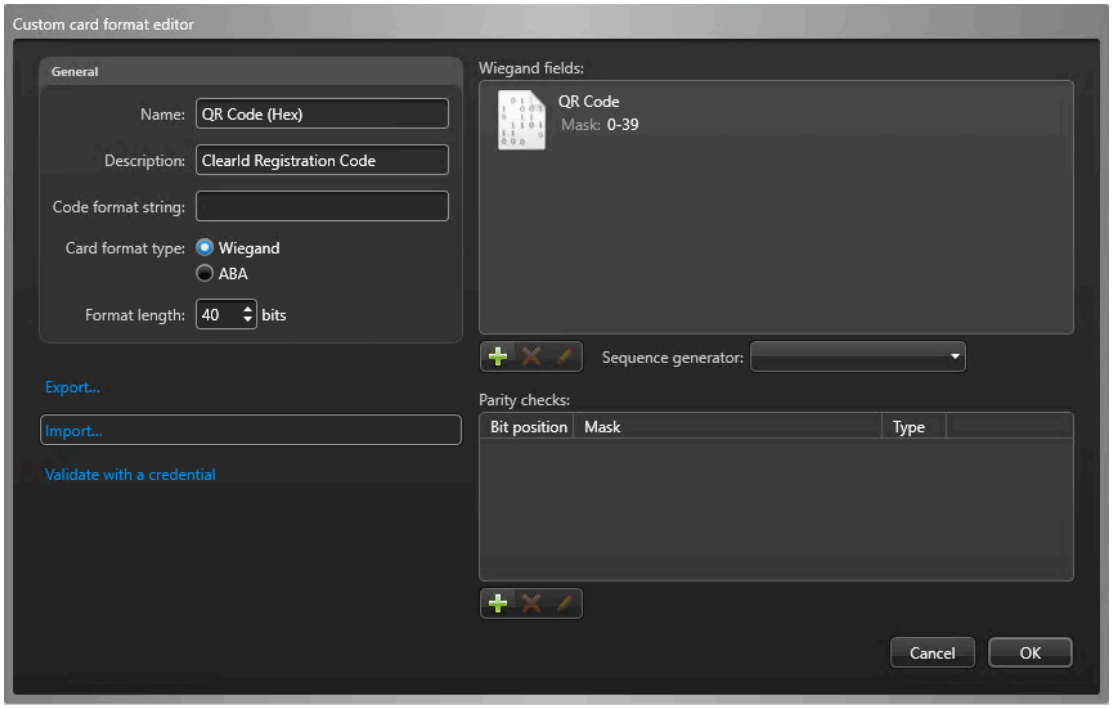
b) In the *Custom card format editor* dialog, click **Import**.



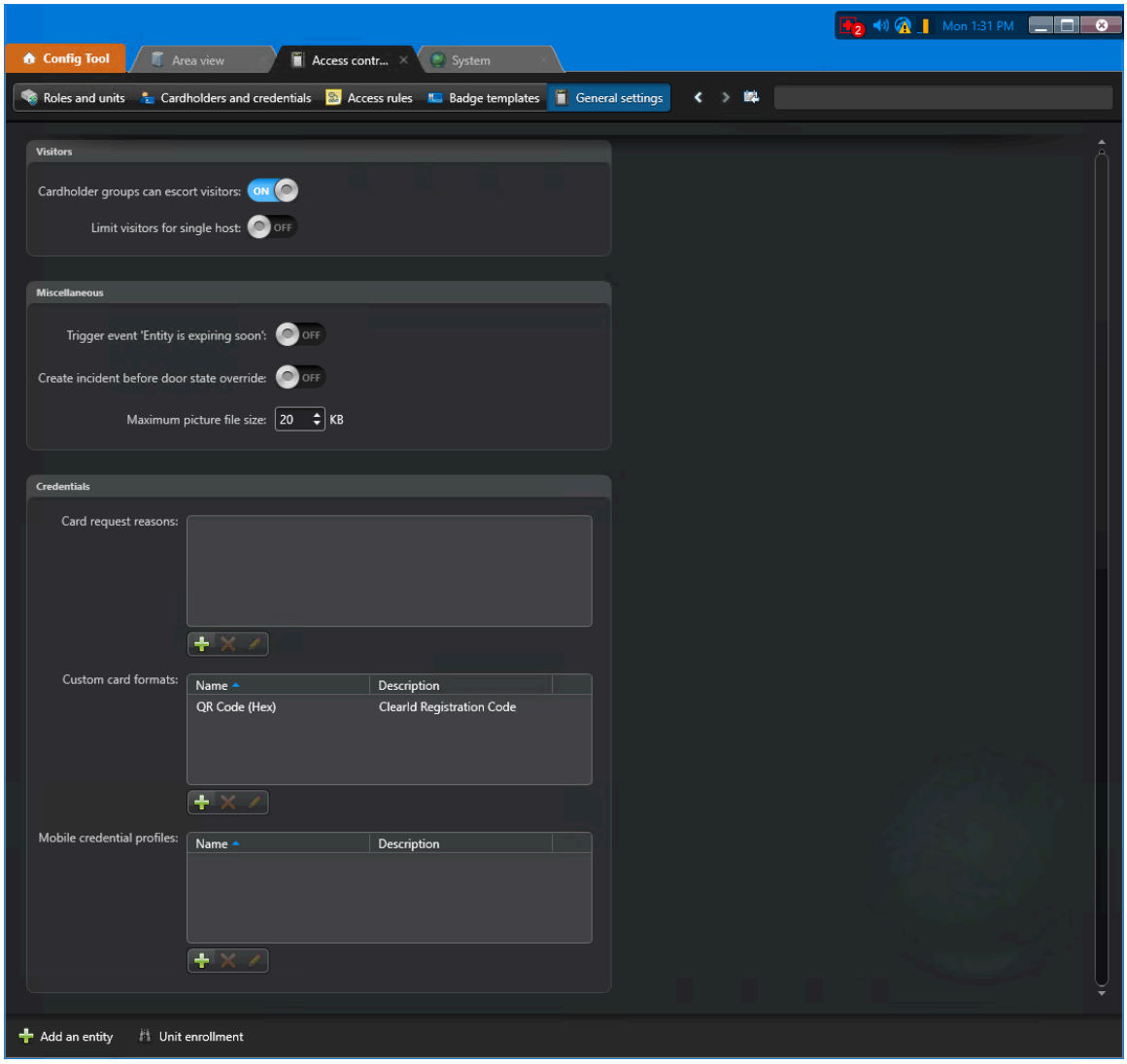
IMPORTANT: You must import the custom card format on the machine where the ClearID plugin is installed. The card format type that is used during import is **Wiegand** format.

c) Navigate to and select the *QRcode.xml* file you downloaded.

d) Click **Open** and click **OK**.



IMPORTANT: You must use this specific *QRCode.xml* file, because there is a GUID in the file that is required by the ClearID plugin.



In the *Access control* task **General settings** view, the QR code (Hex) custom card format is now selected and available.

After you finish

Enable QR code credentials for visitors.

Related Topics

License options on page 70

Enabling QR code credentials for visitors

To automatically create a QR code credential for visitors when a visit request is created, you must enable QR code credentials for visitors.

Before you begin

- Enable visitor management for sites in Genetec ClearID™

- Import a custom card format (QR code credential) in Synergis™

IMPORTANT: Make sure that the custom card format (QR code) is imported and available in the Security Center that your site is connected to.

What you should know

Only site owners or account administrators can enable the QR code credentials for visitors.

- When a QR code is automatically created for a visitor, the visitor is created in an inactive state, and the visitor credential contains an automatically generated QR code. The QR code in the credential matches exactly the QR code in the visitor confirmation email.
- The visitor credential is active at this point, but the QR code is not usable, because the visitor is not checked in yet. When the visitor check-in occurs, the QR code is valid until the visitor checks-out, or the end of the day for the scheduled visit.

For example, QR code credentials for visitors could be used to automatically grant access to a turnstile after check-in.

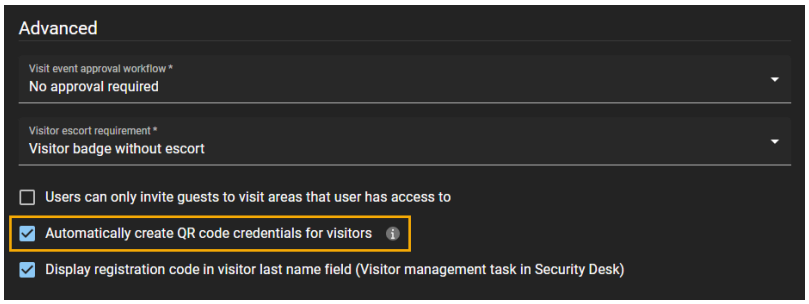
Procedure

1 Click **Organization** > **Sites**.

2 Search for and select a site.

3 Click **Visitor management** to configure the visitor management options for a site.

4 In the *Advanced* section, select **Automatically create QR code credentials for visitors**.



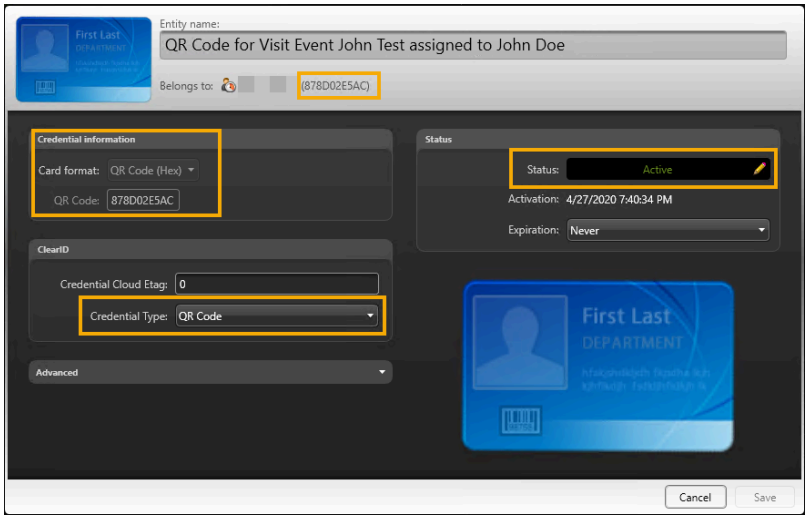
5 Click **Save**.

The next time a visitor is invited to the site, ClearID automatically creates a QR code credential for the visitor. The QR code is included in the visitor confirmation email.

After you finish

Perform a visitor invite and check-in test, to validate that QR code credentials are automatically created for visitors.

TIP: You can perform a visitor search in the *Visitor management* task in Security Desk, then edit the credential to check the visitors' **Credential information**, **Credential type**, and **Status**.



Related Topics

Enabling visitor management for sites on page 247

Configuring Qscan devices for ClearID

Before you can use QR codes as a credential in Genetec ClearID™, you must configure your Qscan devices to support the custom card format (QR code credential) used in ClearID. A QR code can then be used as a credential to access parking entrances, turnstiles, or gated facilities.

Before you begin

Familiarize yourself with the Qscan documentation:

- Qscan User Guide (PDF)
- Qscan (for parking lots) brochure (PDF)
- QscanT (for turnstiles) brochure (PDF)
- QscanI (indoor version) brochure (PDF)

WARNING: Qscan barcode readers contain a Class 2 laser. Do not look directly into the laser.

What you should know

This procedure is for system integrators or account administrators who install and configure barcode scanners.

The following Qscan devices can be used with ClearID to scan QR codes as a credential for visitors:

- Qscan (for parking lots)
- QscanT (for turnstiles)
- QscanI (indoor version)

Procedure

1 Connect a Qscan barcode reader to a Mercury Controller.

2 Configure Qscan barcode reader to support 40-bit hexadecimal QR codes.

Related Topics

Supported devices on page 77

Connecting a Qscan barcode reader to a Mercury Controller

In situations where you need to use a Qscan barcode reader to access parking entrances, turnstiles, or gated facilities, you must connect a Qscan barcode reader to a Mercury controller. This ensures that the barcode reader can communicate with Security Center Synergis™ to manage access.

Before you begin

WARNING: Qscan barcode readers contain a Class 2 laser. Do not look directly into the laser.

What you should know

This procedure is for system integrators or account administrators who install and configure barcode scanners.

In this scenario, we describe how to connect a Qscan barcode reader to a Mercury EP 1502 controller.

Procedure

- Connect your Qscan barcode reader device to the Reader 1 connection block in the Mercury EP 1502 controller.

Figure 11: Figure 1: Qscan barcode reader

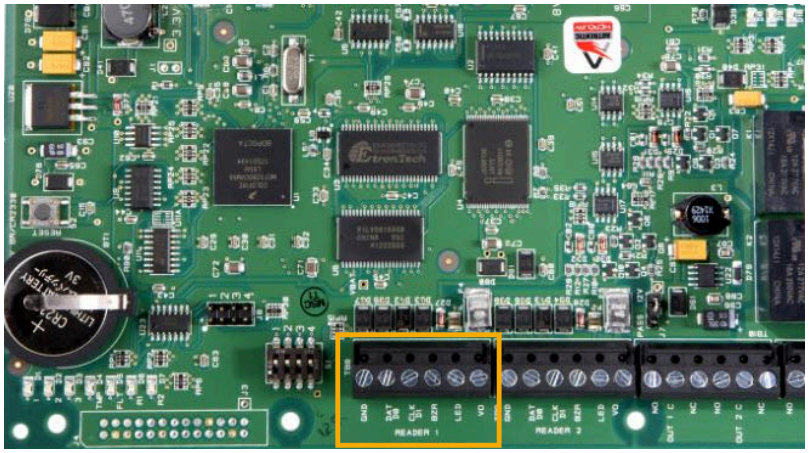
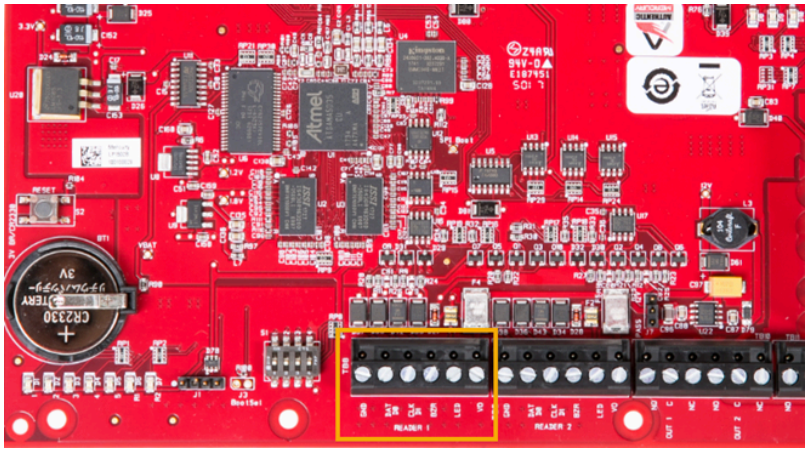


Figure 12: Figure 2: Mercury EP1502 controller boards



NOTE: The Mercury controller boards can vary in color depending on when they were manufactured and purchased.

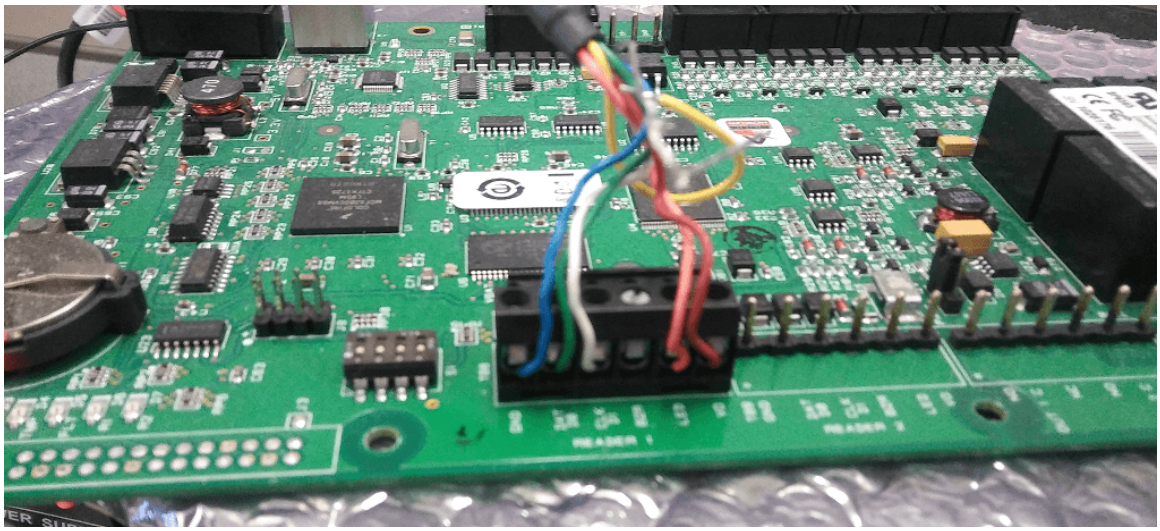


Figure 13: Figure 3: Mercury EP1502 controller board wiring loom connections

Use the following table to understand how to connect the Qscan barcode reader wires to the terminals on the Mercury controller *Reader 1* connector block.

Mercury controller and Qscan reader wiring connections

Mercury EP1502: Reader 1 connections	Qscan barcode reader: wire colors
GND (Ground)	BLUE
DAT D0 (Data/Data 0/TR-)	GREEN
CLK D1 (Clock/Data 1/TR+)	WHITE
BZR (Reader Buzzer)	Not applicable
LED (Reader LED)	ORANGE
V0 (Reader Power)	RED

After you finish

Configure Qscan barcode reader to support 40-bit hexadecimal QR codes

Configuring Qscan barcode reader to support 40-bit hexadecimal QR codes

Before the QR codes automatically generated by Genetec ClearID™ for visitor confirmation email notifications can be understood and processed by Synergis™ Cloud Link during check-in, you must configure your Qscan barcode reader to support 40-bit hexadecimal QR codes.

Before you begin

Connect Qscan barcode reader to Mercury controller

WARNING: Qscan barcode readers contain a Class 2 laser. Do not look directly into the laser.

What you should know

This procedure is for system integrators or account administrators who install and configure barcode scanners.

In this scenario, we describe how to program Qscan devices to support 40-bit hexadecimal QR codes used in ClearID and output to Synergis Cloud Link.

For example, a QR code when scanned by Qscan is typically read as alphanumerics ABC1234567.

Synergis Cloud Link requires the QR code in HEX format 0xAB 0xC1 0x23 0x45 0x67 to manage access requests.

CAUTION: The steps described in the following process remove alphanumeric QR code support from the Qscan barcode reader. The Qscan barcode reader cannot be used in alphanumeric mode while the 40-bit hexadecimal mode is active.

Procedure

1 To reset to factory default settings, scan the qscan resetbarcode1.pdf barcode.

NOTE: The Qscan reader beeps twice if the factory reset is successful.

2 To ignore alphanumeric characters, scan the qscan no alpha delete.pdf barcode.

3 To turn HEX conversion on, scan the qscan hex conversion.pdf barcode.

4 To output 40-bits, scan the qscan 40-bit.pdf barcodes.
NOTE: This file has three barcodes so scan one at a time.

Configuring STid devices for ClearID

Before you can use QR codes as a credential in Genetec ClearID™, you must configure your STid devices to support the QR code custom card format used in ClearID. A QR code can then be used as a credential to access parking entrances, turnstiles, or gated facilities.

Before you begin

Familiarize yourself with the STid documentation:

- Architect® Blue QR code readers.
  - ARCS-AQ/BT - 13.56 MHz + Bluetooth® + QR Code multi-technology reader
- SECard - High security programming kits
- SECard User Manual

What you should know

This procedure is for system integrators or account administrators who install and configure QR code readers.

In this scenario, we describe how to program STid devices to support 40-bit hexadecimal QR codes used in ClearID and output to Synergis™ Cloud Link.

Procedure

1 Learn about STid QR code readers.
2 Import custom card format.

3 Set up and connect your QR code reader to your access control panel.

NOTE: The steps you must perform will vary depending on your access control panel.

- To connect your OSDP reader to Synergis Cloud Link, see OSDP readers connected to the Synergis Cloud Link RS-485 ports.
- To connect your OSDP reader to Mercury, see Adding OSDP (Secure Channel) readers to a Mercury controller.

4 Creating an STid QR code reader configuration on page 403.

5 Transferring your reader configuration to your STid QR code reader on page 417.

After you finish

Add doors to areas.

About STid QR code readers

In Genetec ClearID™, STid QR code readers can be used to read QR code credentials.

NOTE: The image shown here illustrates STid readers that you might have in your organization. For a list of the Open Supervised Device Protocol (OSDP) readers that ClearID supports, see Supported devices.

Why choose the OSDP protocol over Wiegand protocol?

WIEGAND Protocol

In Wiegand the reader always sends a fixed-length wiegand format, regardless of the credential length. The *custom card format* called by Security Desk is always the same. The manufacturer has confirmed this Wiegand readers (SY-ARCS-R31-AQBT1-XX1) limitation.

Consequence: The credential does not match the length required by the protocol and an Unknown credential message is displayed in Security Desk even if this QR code credential is already enrolled in the Security Center Synergis™ database.

Workaround: To make sure that all types of credentials work simultaneously with Wiegand protocol readers and Synergis, all other credentials (RFiD or QR code from another source such as Axis) should match the ClearID QR code credential length (40 bits). This approach ensures that Synergis always receives the same *custom card format* (the card format from ClearID) and correctly interprets all types of payloads that the reader sends.

OSDP Protocol

In Open Supervised Device Protocol (OSDP) the reader dynamically adapts the format length regarding the credential length.

BEST PRACTICE: Use OSDP with STid QR code readers to ensure that the QR code credential is accepted and understood.

The following table shows example reads from the same reader.

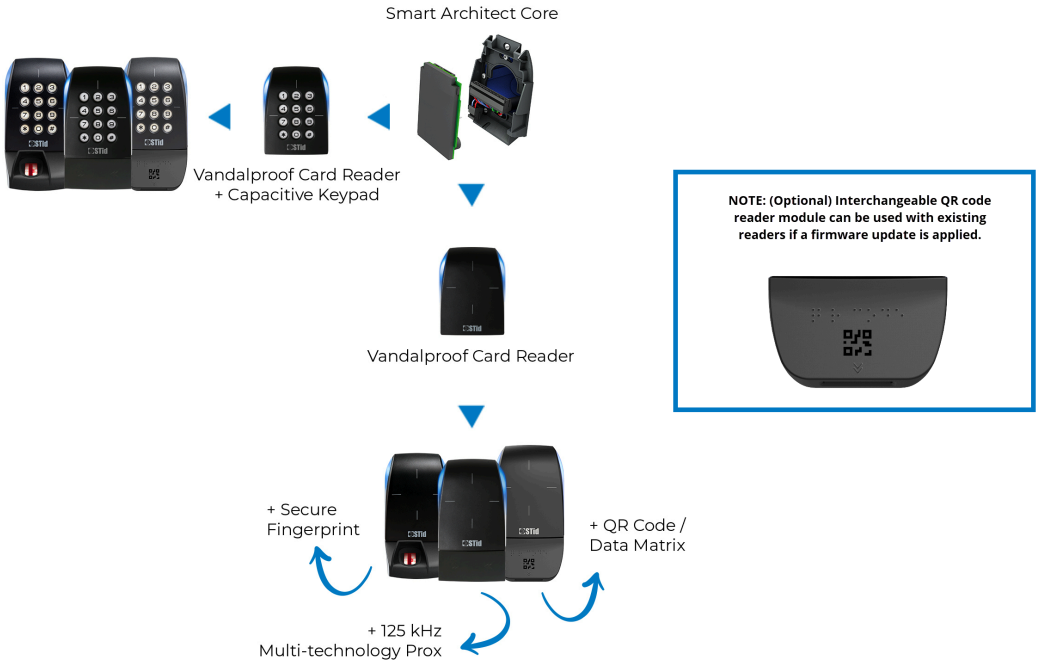
Credential code	Card format	
4AE6CD6464E	QR code (HEX)	ClearID QR code
E01EC72022429729	64 bits	DESFire 64 bits private ID credentials

The examples show that the *custom card format* called by Security Desk is different for each read.

Consequence: The OSDP reader is more flexible and correctly interprets the credential.

Planning your QR code reader deployment

Depending on your needs, you can use the latest STid Architect® Blue QR code readers. Alternatively, you can add interchangeable QR code modules if you want to reuse existing STid readers.



Consider the following when planning your STid QR code reader implementation:

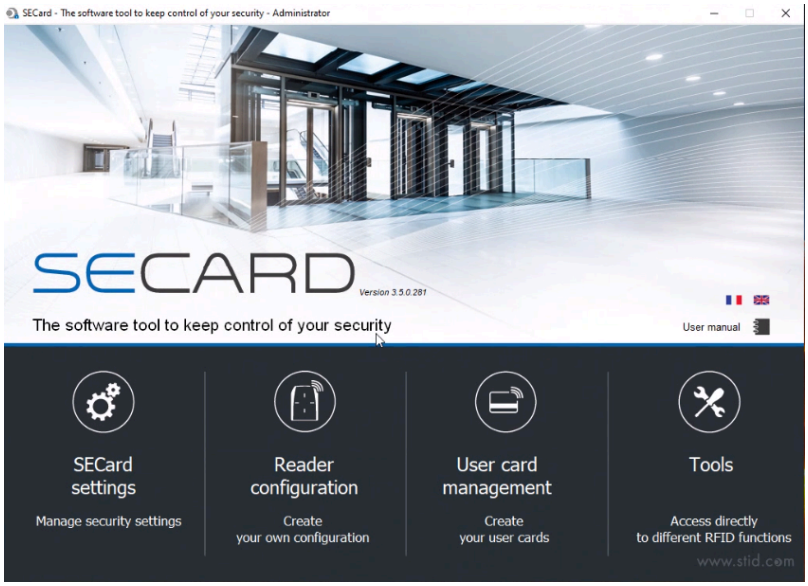
- **BEST PRACTICE:** If you are planning a new STid QR code reader implementation, consider using the latest QR code readers with the latest firmware. For example, model: ARCS-AQ/BT. Only use STid readers that support the OSDP protocol and have upgraded to **firmware version 10**.
- If you already have numerous STid readers deployed in your organization, consider adding the interchangeable QR code reader module and updating your firmware.

  TIP: Using the interchangeable module upgrades can result in significant savings on a large project.
- If you are re-using existing readers, refer to *STid documentation* about how to upgrade your reader to **firmware version 10** or later.

Programming your STid QR code readers

The STid QR code readers can be programmed using the *STid SECard - High security programming kit*.

BEST PRACTICE: Use STid **SECard software version 3.5** or later to configure your STid QR code readers.



The KIT-SECARD-BT-V3.X includes the following:

- STid Architect® ARC-G desktop reader, enroller, encoder

- USB key containing the STid SECard software

IMPORTANT: Genetec Inc. does not provide support for the STid SECard solution. Customers must use the stand-alone STid SECard software to configure the OSDP readers to work with the ClearID ACS panel solution.

Related Topics

Supported devices on page 77

Creating an STid QR code reader configuration

Before you can use QR codes as a credential in Genetec ClearID™, you must create your STid QR code reader configuration. A QR code can only be used as a credential for an STid QR code reader after the QR code reader configuration has been uploaded to an STiD OCB smart card and then transferred to the STid QR code reader.

Before you begin

Familiarize yourself with the STid documentation:

- SECard - High security programming kits
- SECard User Manual
- Install the STid SECard - High security programming kit software.

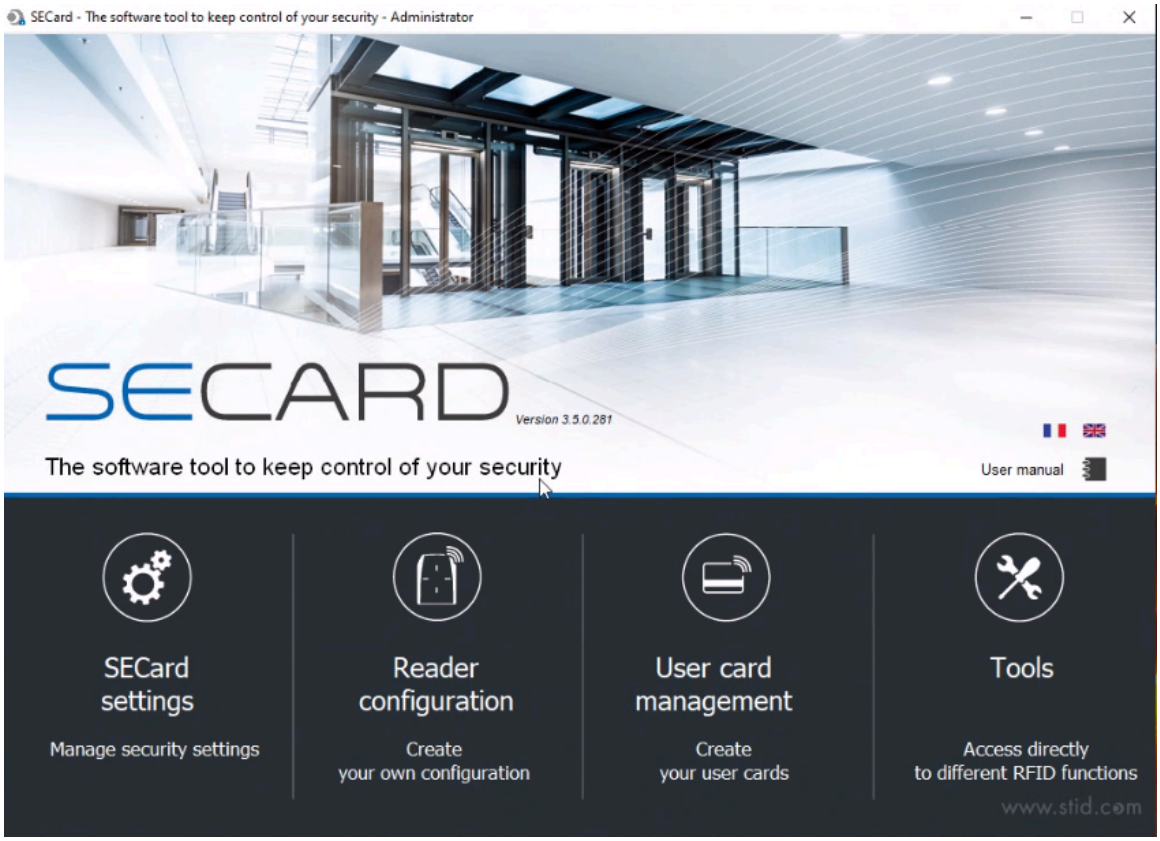
What you should know

This procedure is for system integrators or account administrators who install and configure QR code readers.

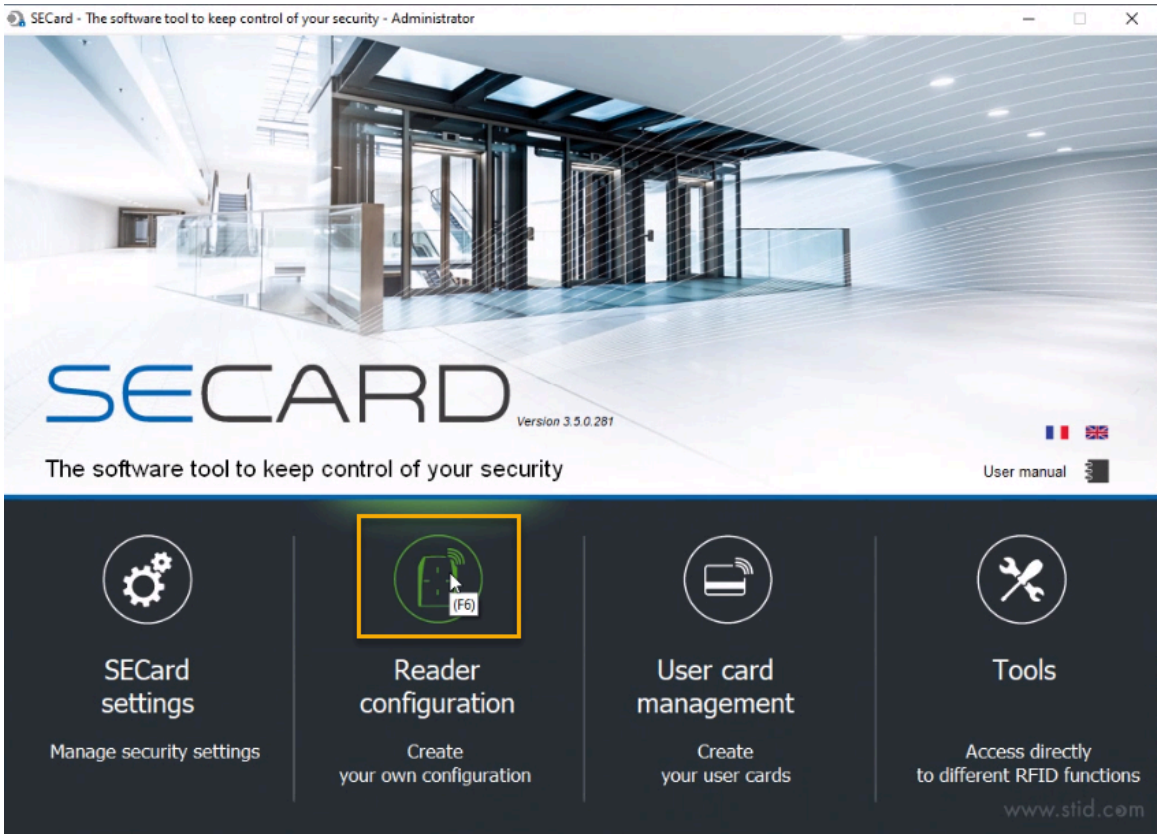
NOTE: The STid SECard software requires a license, the number is typically found on the USB reader that is used to encode a smart card.

Procedure

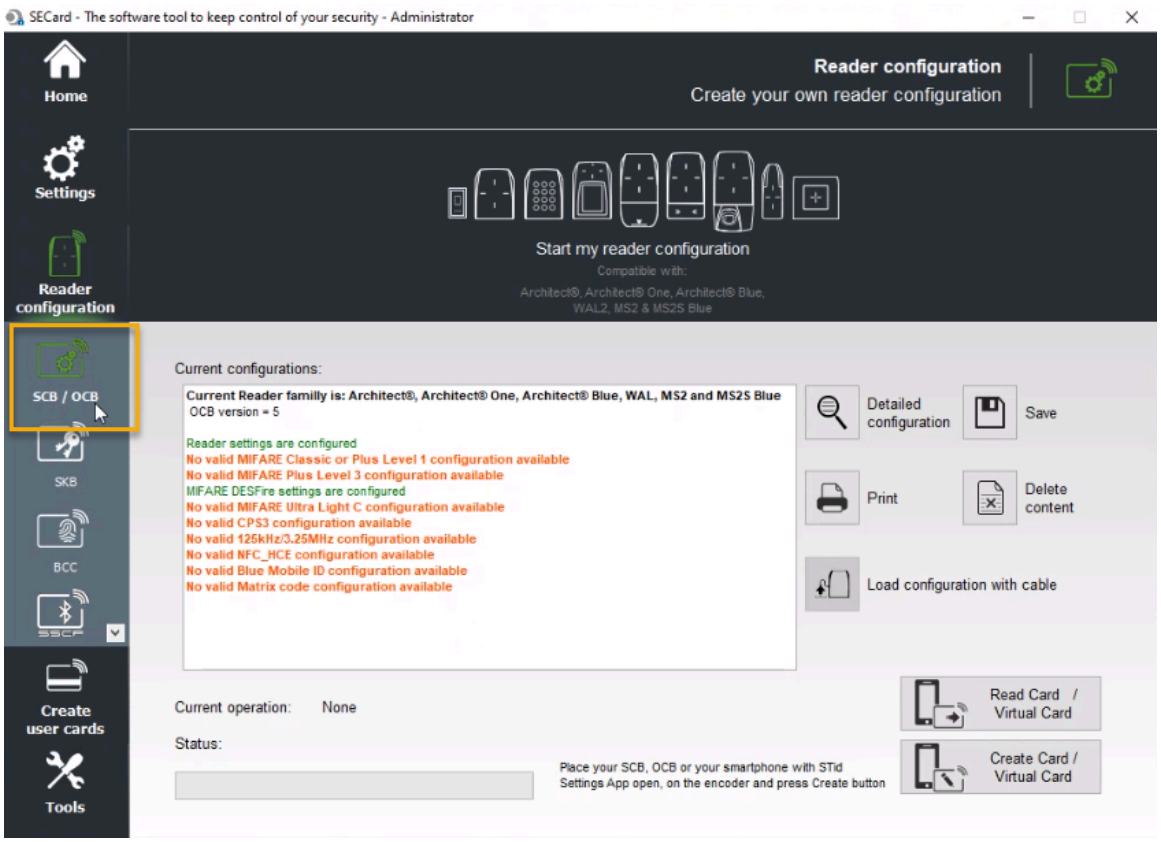
1 Launch the STid SECard - High security programming kit software to configure your STid QR code reader.



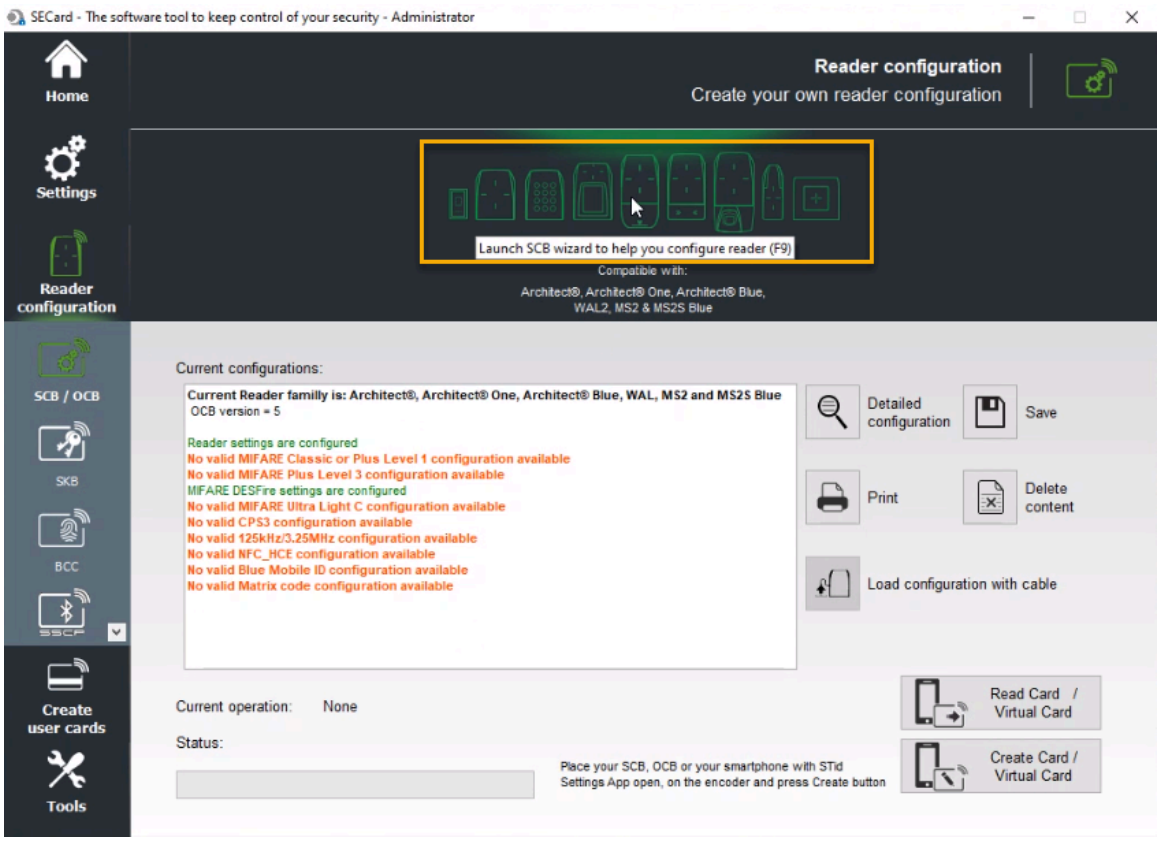
2 Click **Reader configuration**.



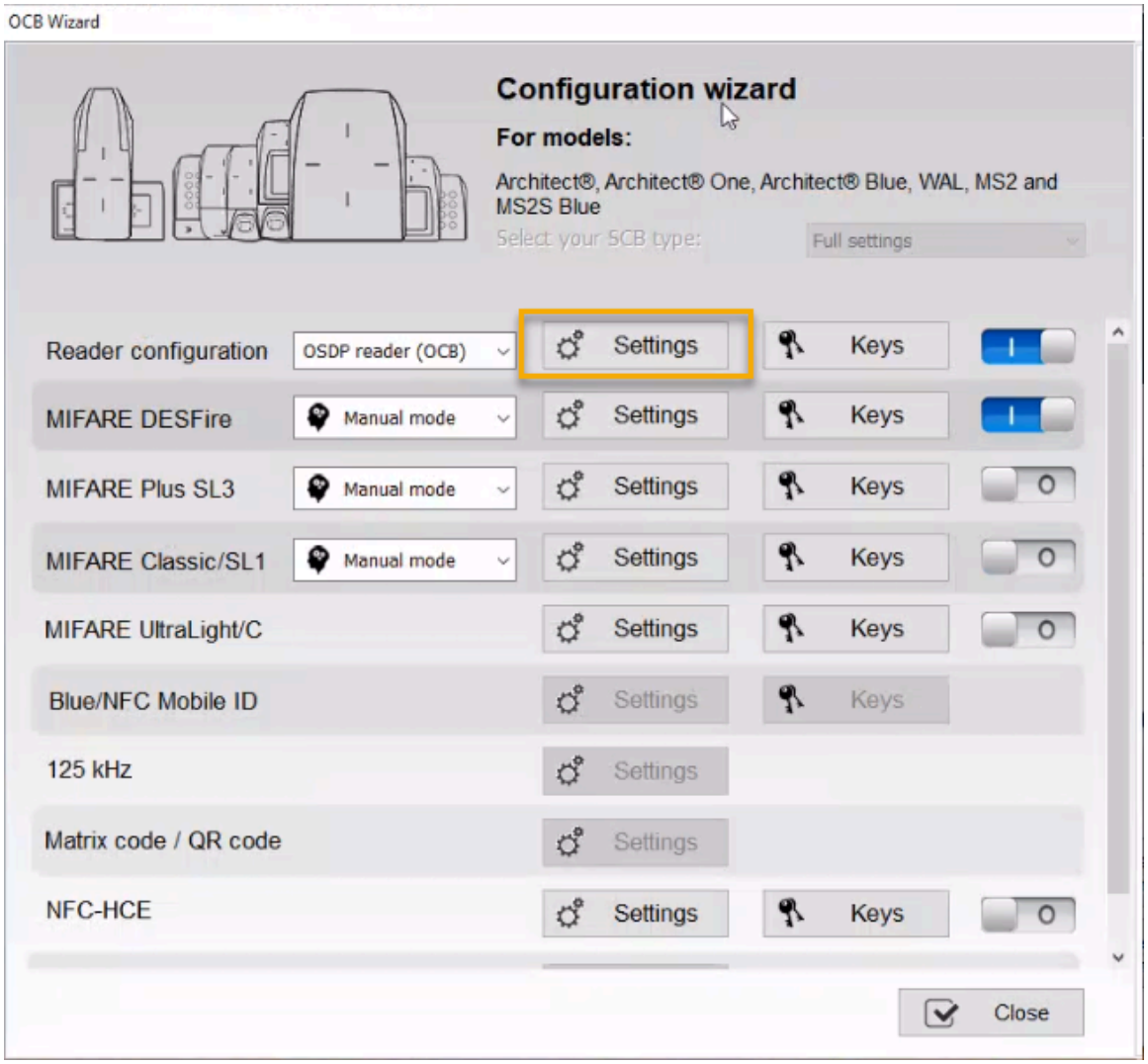
a) In the navigation sidebar, click **SCB / OCB**.



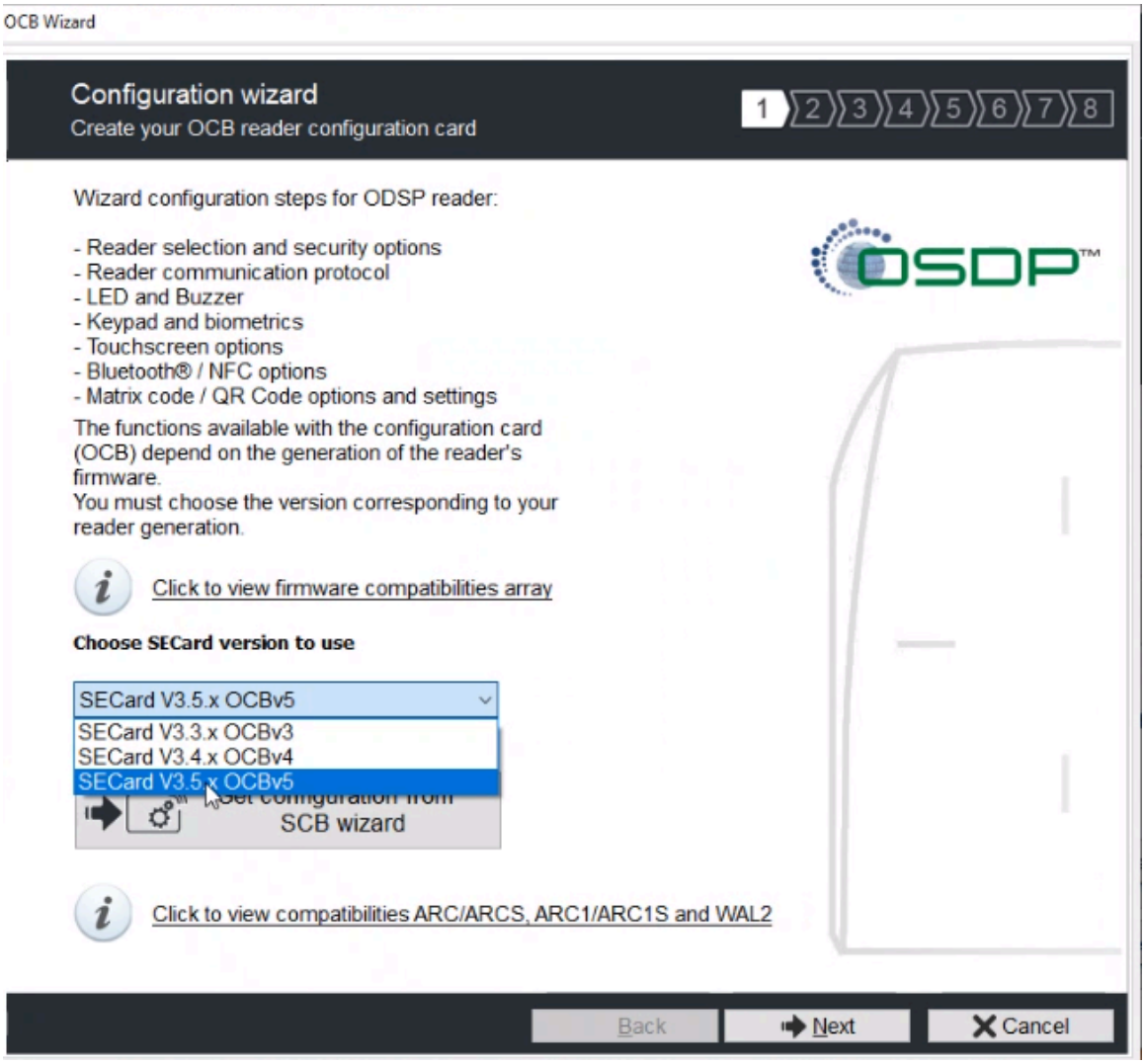
b) Click the readers image at the top of the screen to launch the SCB wizard.



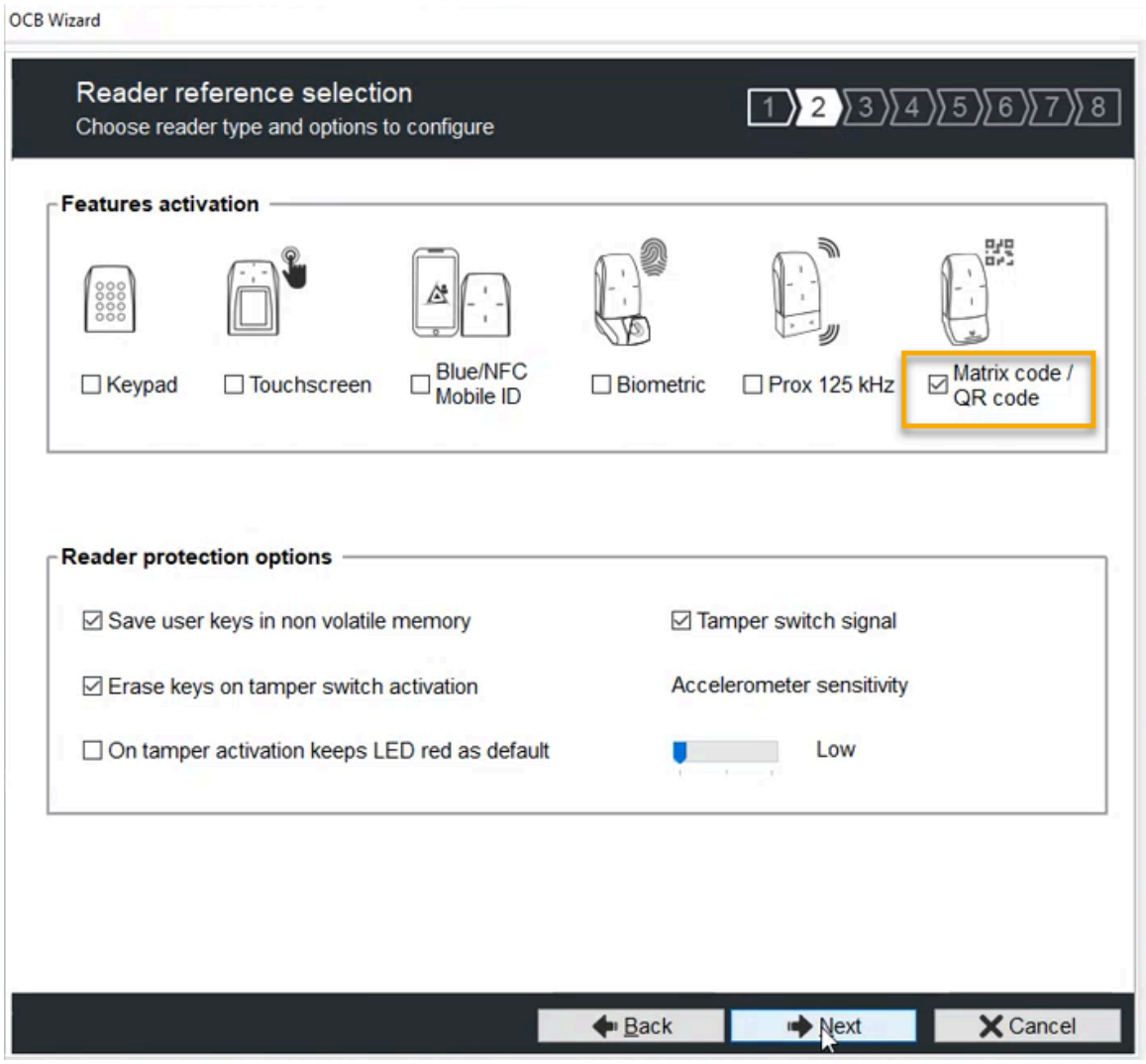
c) In the *Reader configuration* row, next to OSDP reader (OCB), click **Settings** to open the Configuration wizard.



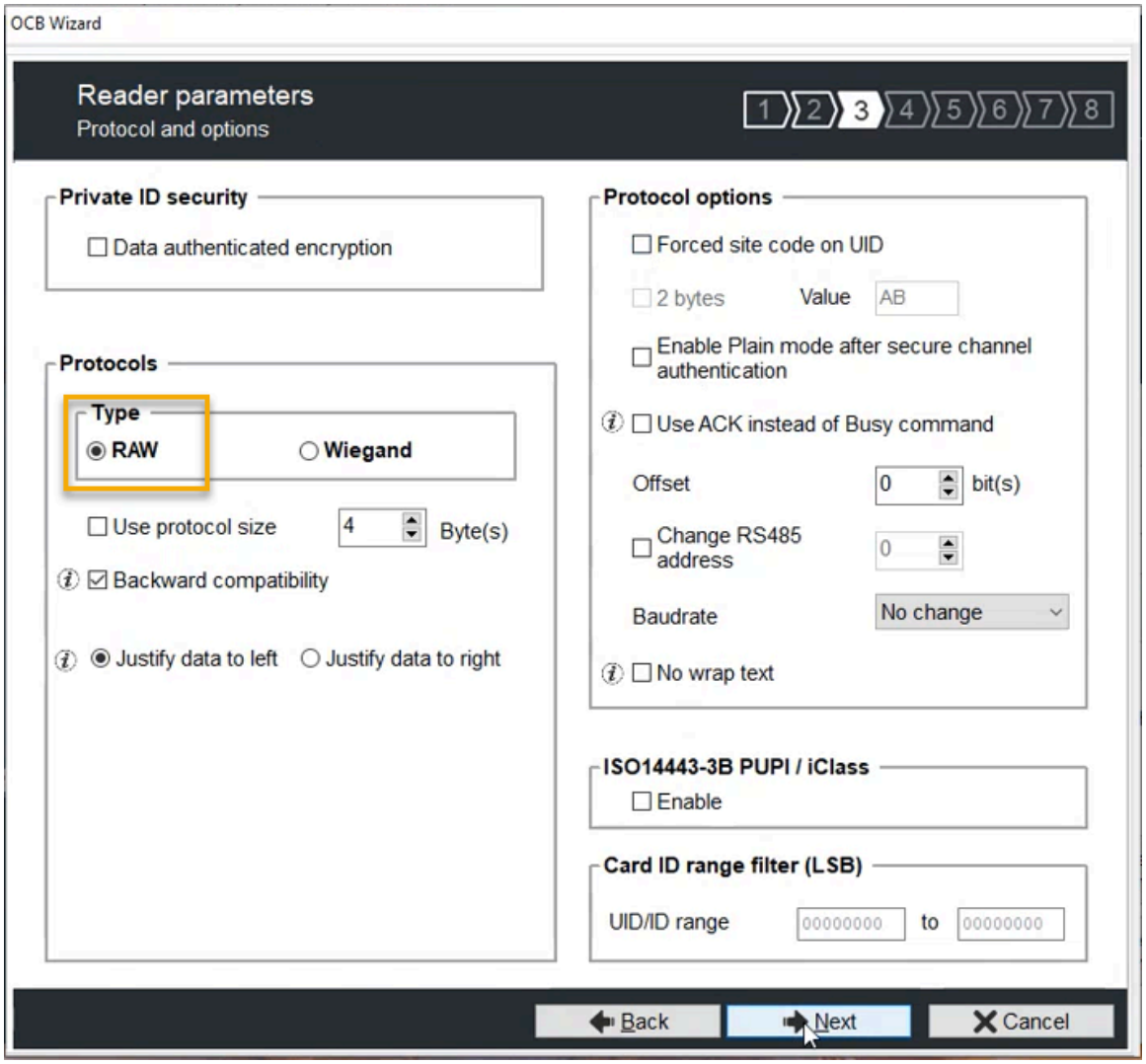
3 In the *Configuration wizard* dialog, select **SECard V3.5 x OCBv5** and click **Next**.



a) In the *Reader reference selection* dialog, select the **Matrix / QR Code** check box and click **Next**.



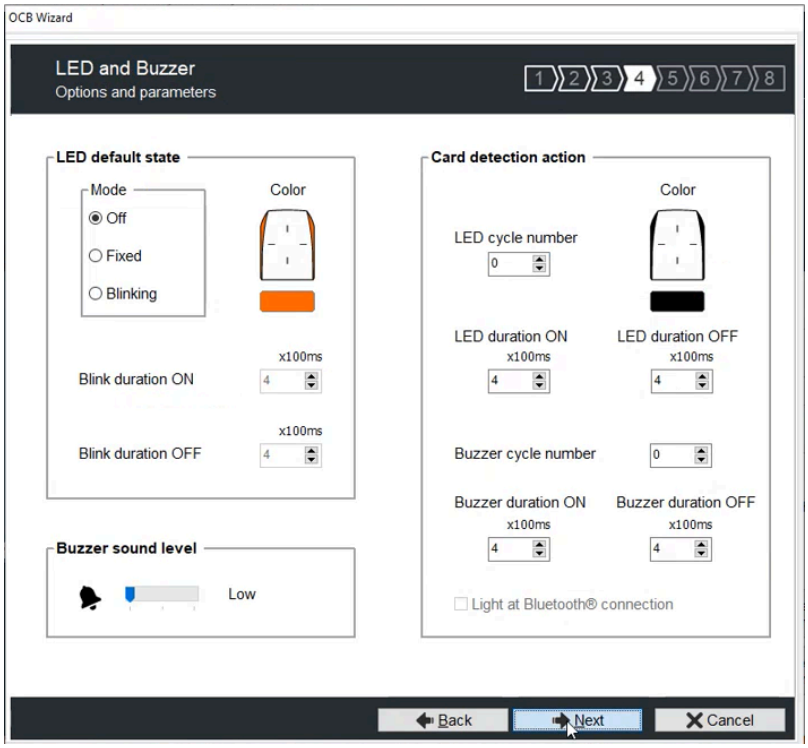
b) In the *Reader parameters* dialog *Protocols* section select the Type **RAW** and click **Next**.



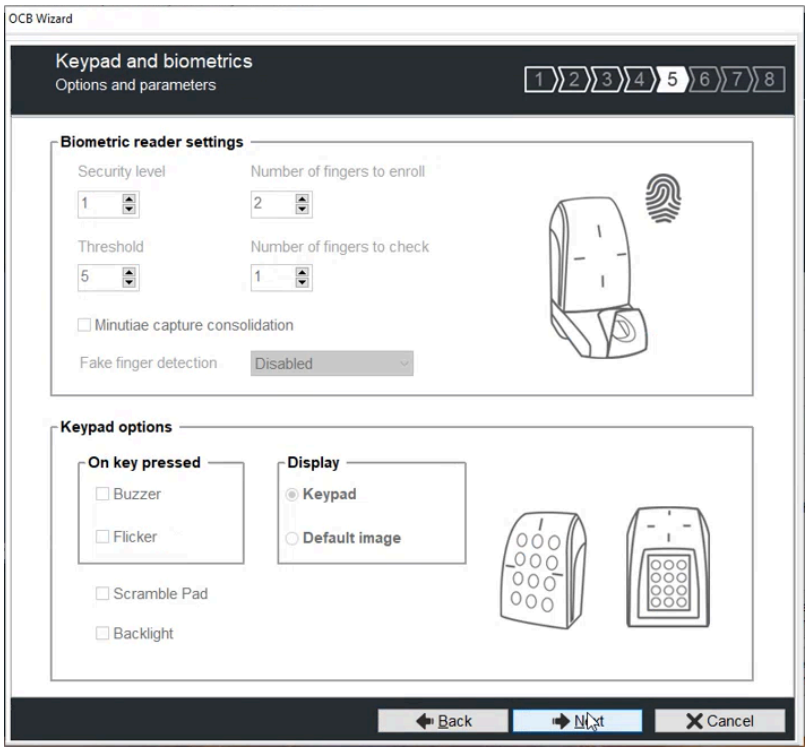
NOTE: The **Byte(s)** setting is not used when the **Use protocol size** check box is not selected. This ensures that the reader will adapt the length according to the length of the credential.

4 The following steps (4.a on page 411 - 4.d on page 412) are not essential for QR code use, but might still be relevant to your installation.

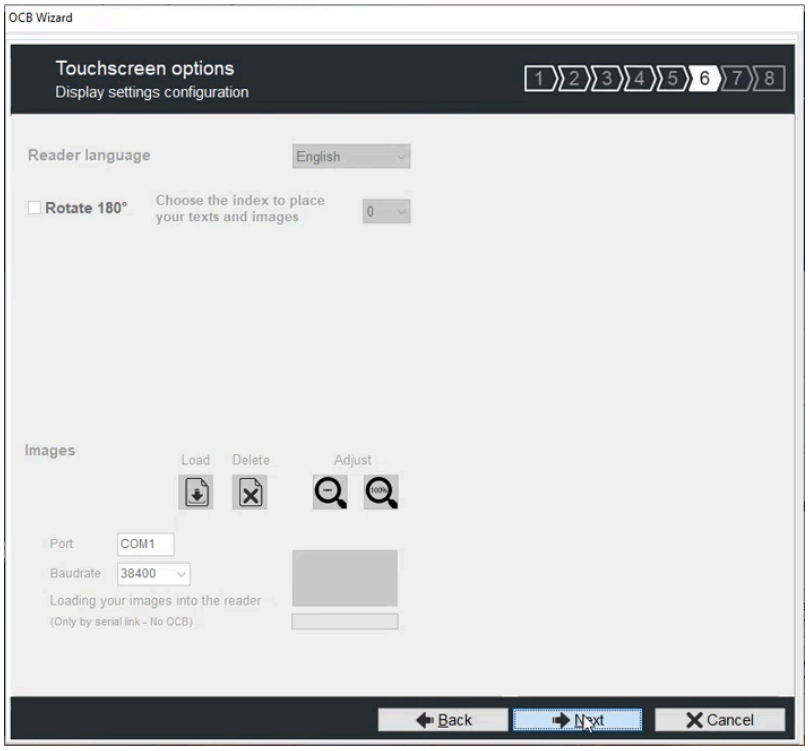
a) Click **Next** to skip the *LED and Buzzer* dialog.



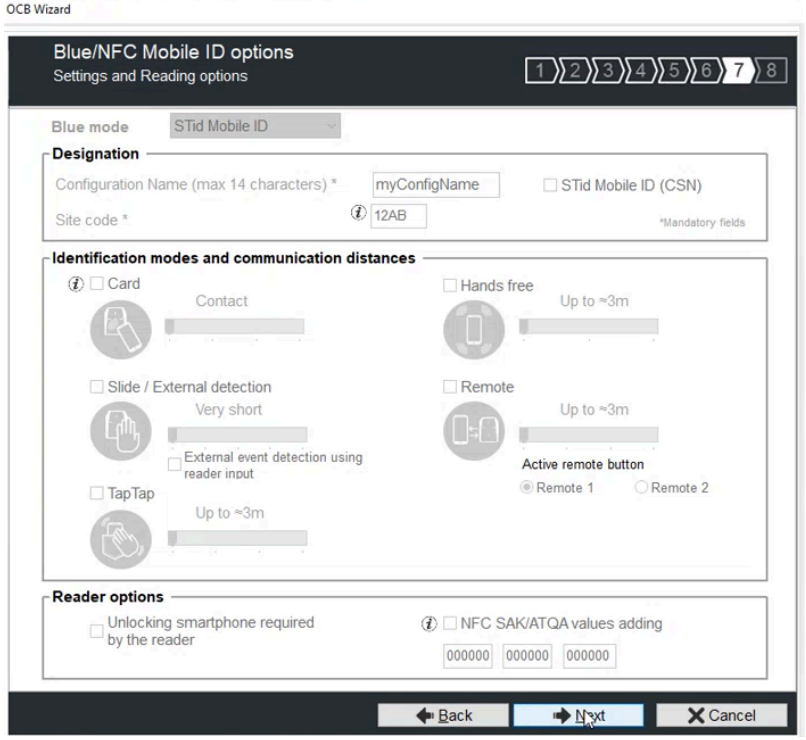
b) Click **Next** to skip the *Keypad and biometrics* dialog.



c) Click **Next** to skip the *Touchscreen options* dialog.

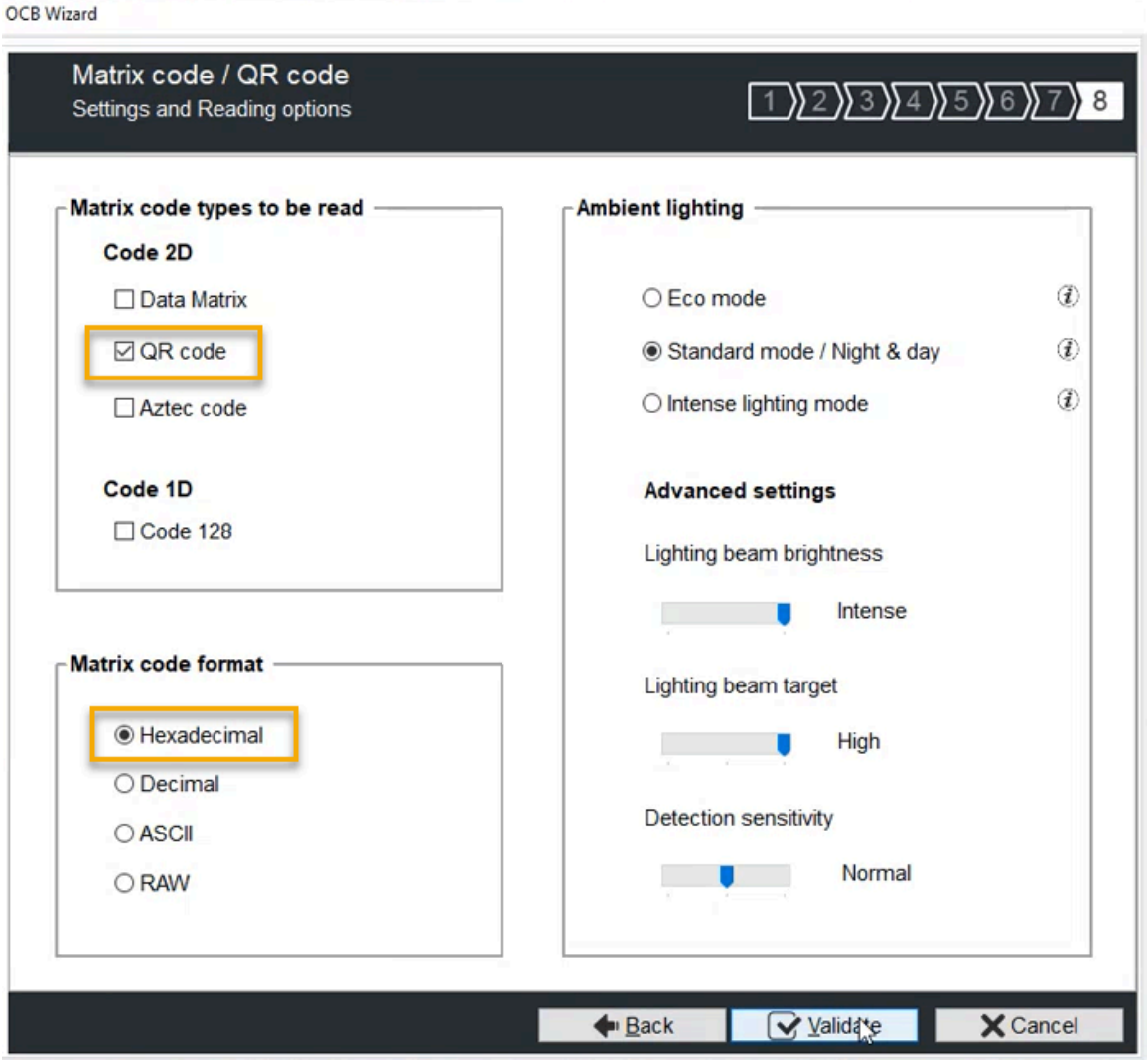


d) Click **Next** to skip the *Blue/NFC Mobile ID options* dialog.



5 In the *Matrix code types to be read* section of the *Matrix code / QR code* dialog, select the **QR code** check box only. Then in the *Matrix code format* section, select the **Hexadecimal** check box.

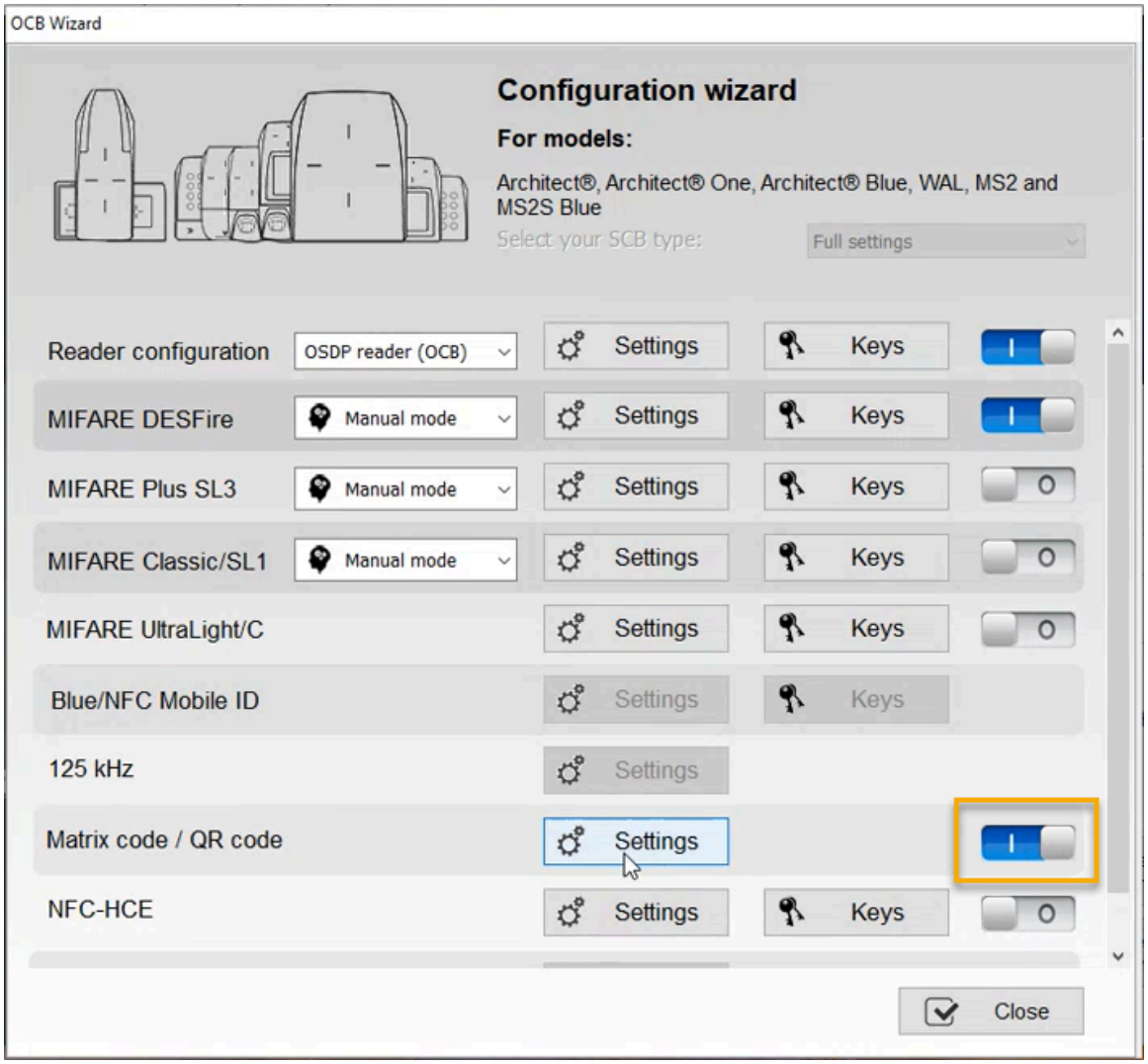
These settings specify that a 2D QR code can be read and sent in hexadecimal format.



a) (Optional) In the *Ambient lighting* section, modify the settings if required.

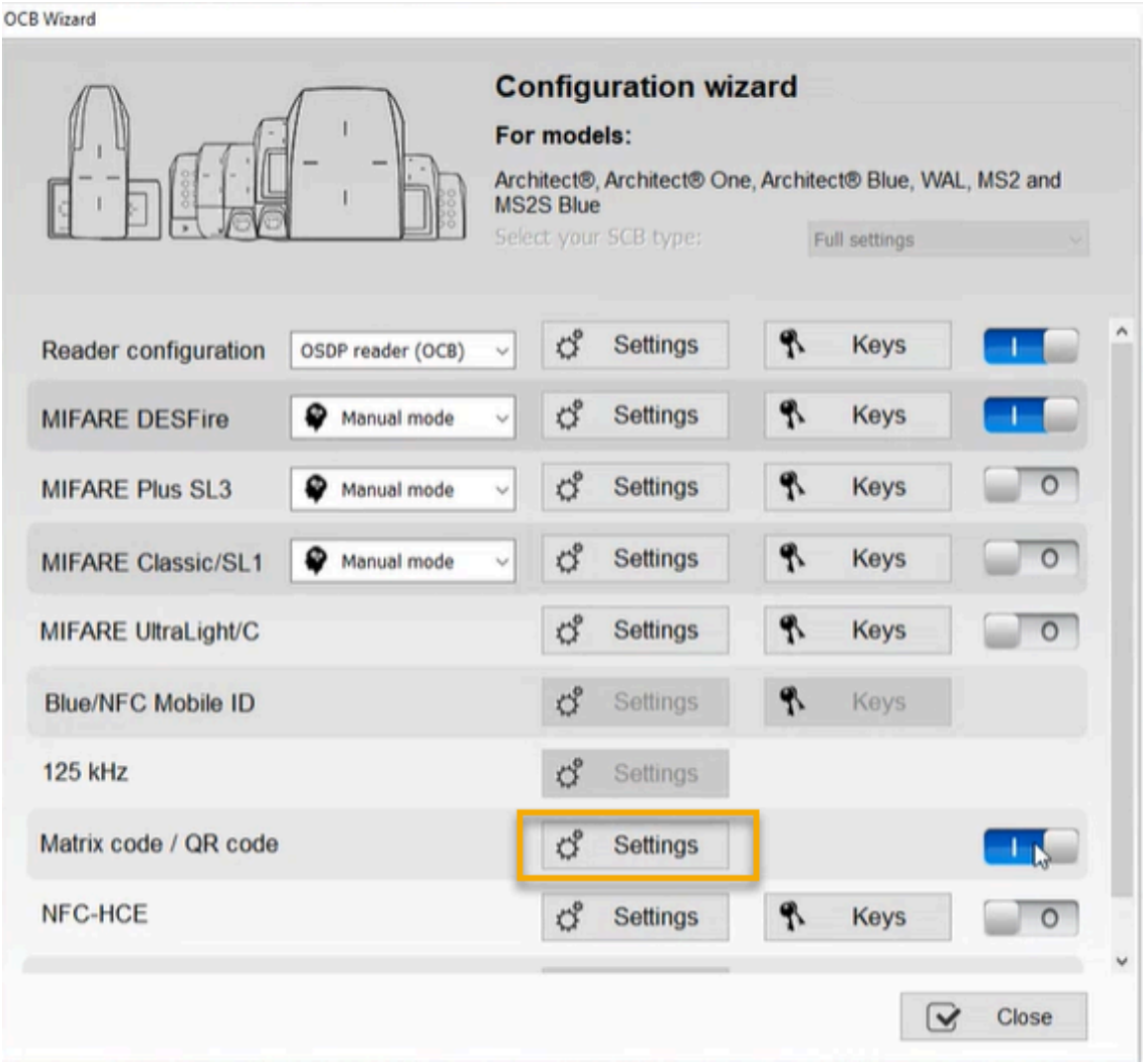
b) Click **Validate**.

6 In the *Matrix code / QR code* row, drag the slider to the enabled position.

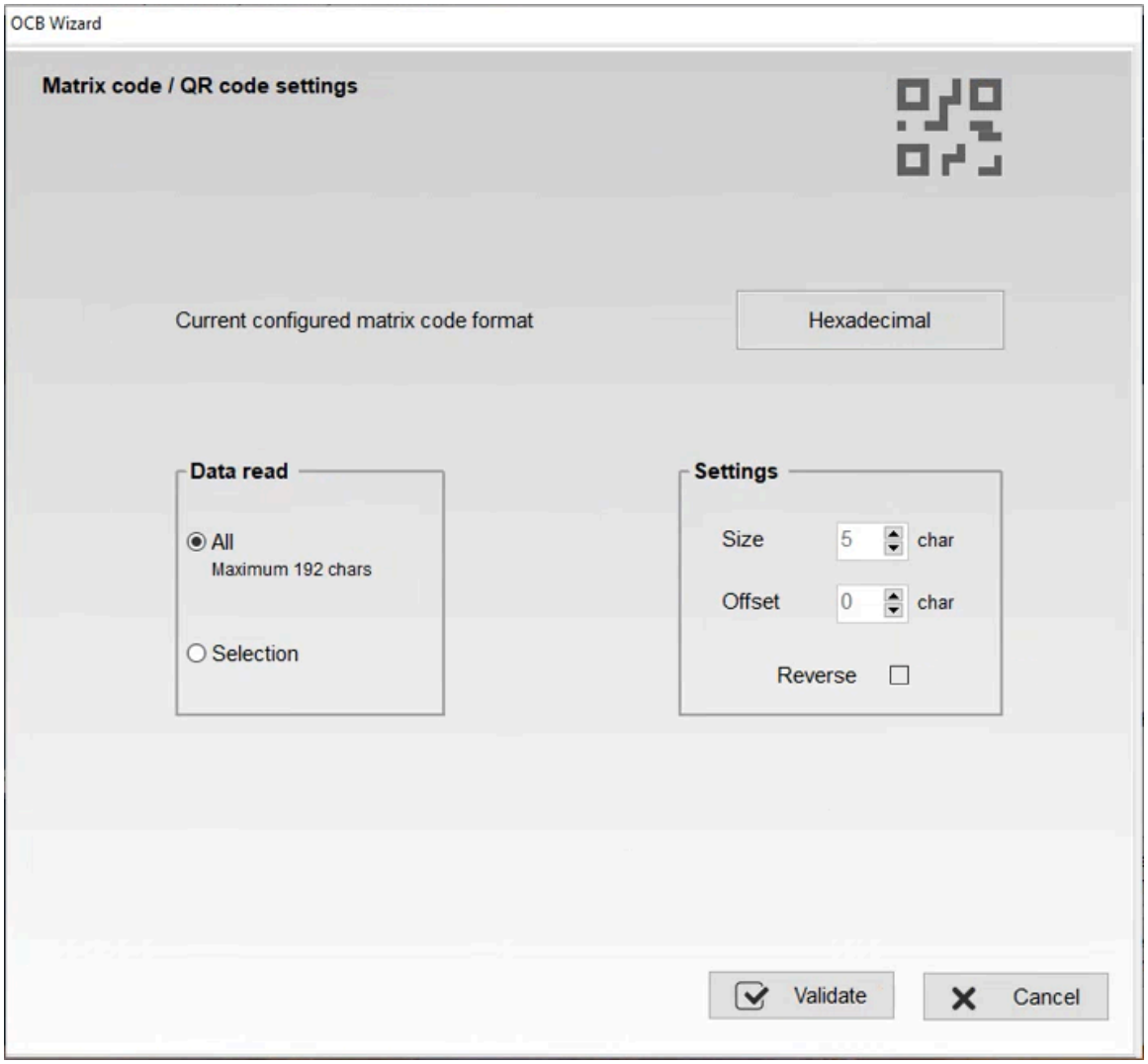


TIP: If the *Matrix code / QR code* section is not available for selection in the Configuration wizard, make sure that you have validated your Reader configuration as detailed earlier.

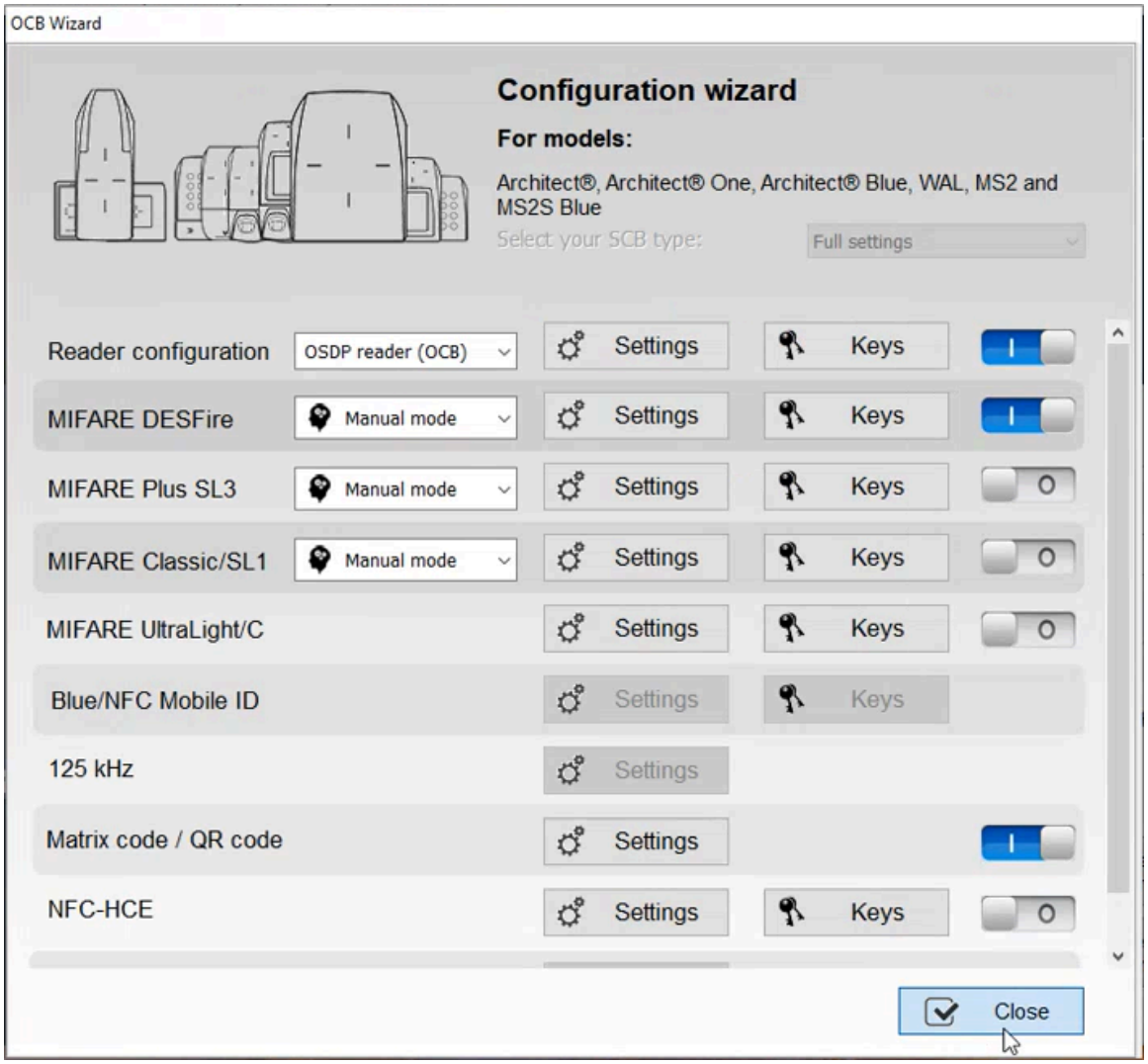
7 In the *Matrix code / QR code* row, click **Settings**.



a) In the *Matrix code / QR code settings* dialog, use the default settings and click **Validate**.



b) Click **Close**.



Your STid QR code reader configuration has now been created.

After you finish

Transfer your reader configuration to your STid QR code reader.

Transferring your reader configuration to your STid QR code reader

Before you can use QR codes as a credential in Genetec ClearID™, you must complete your STid QR code reader configuration by configuring an STiD OCB smart card so that you can transfer the reader configuration to the STid QR code reader.

Before you begin

Familiarize yourself with the STid SECard documentation:

- SECard - High security programming kits
- SECard User Manual
- Install the STid SECard - High security programming kit software
- Create your STid QR code reader configuration

What you should know

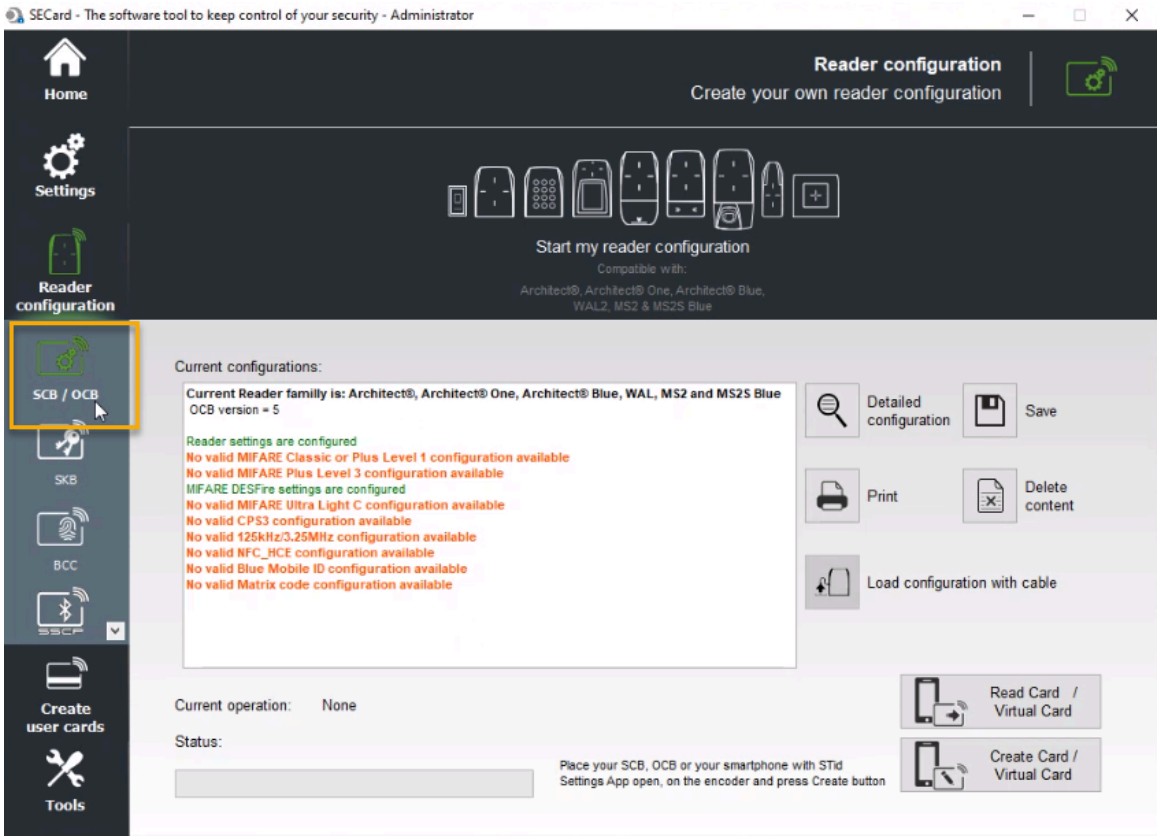
This procedure is for system integrators or account administrators who install and configure QR code readers.

NOTE: Ensure that you have a USB encoder installed and ready to configure your OCB card. For example, the STid Architect® ARC-G desktop reader, enroller, encoder.

Procedure

1 Launch the STid SECard software to configure your card.

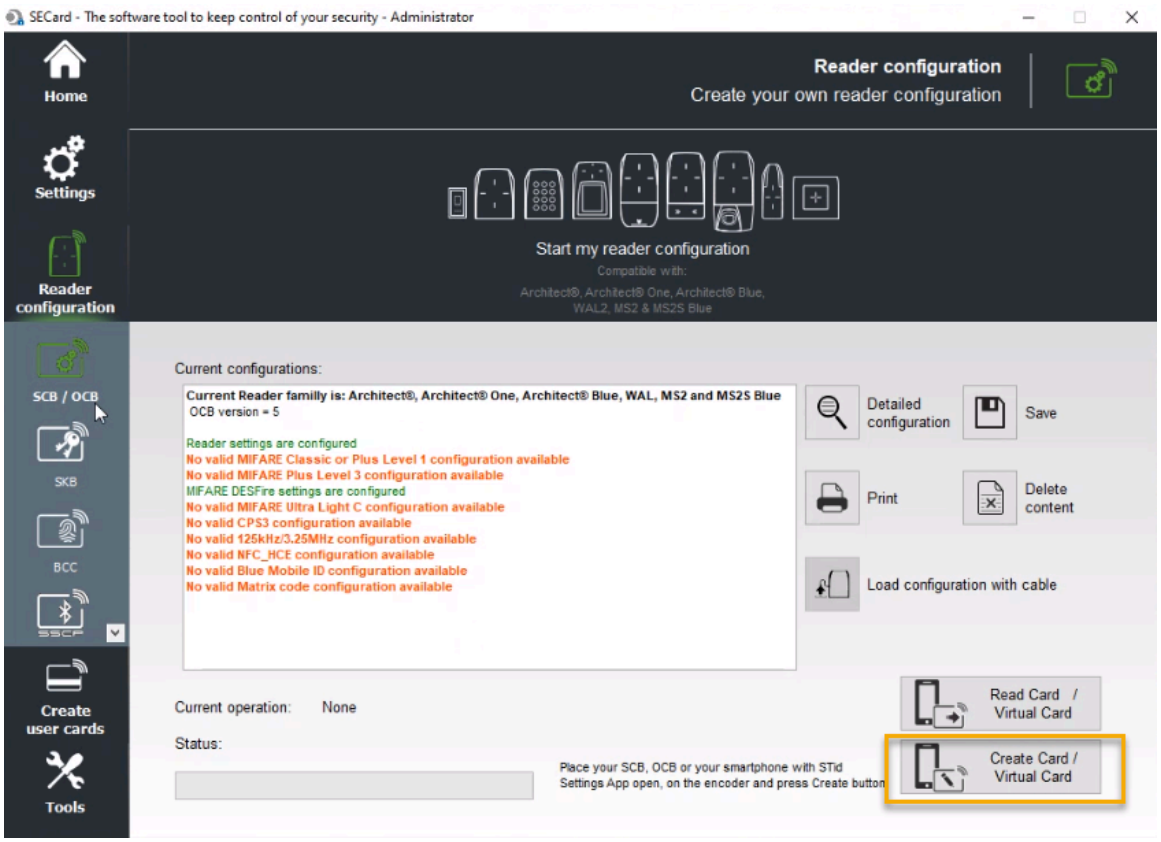
2 In the navigation sidebar, click **SCB / OCB**.



3 Create your STid OCB card.

a) Place the OCB card on your USB encoder (reader).

b) Click **Create Card / Virtual Card** to create your configuration card.



4 Take the OCB smart card containing your reader configuration to the location of your new QR code reader and pass the card in front of the reader.

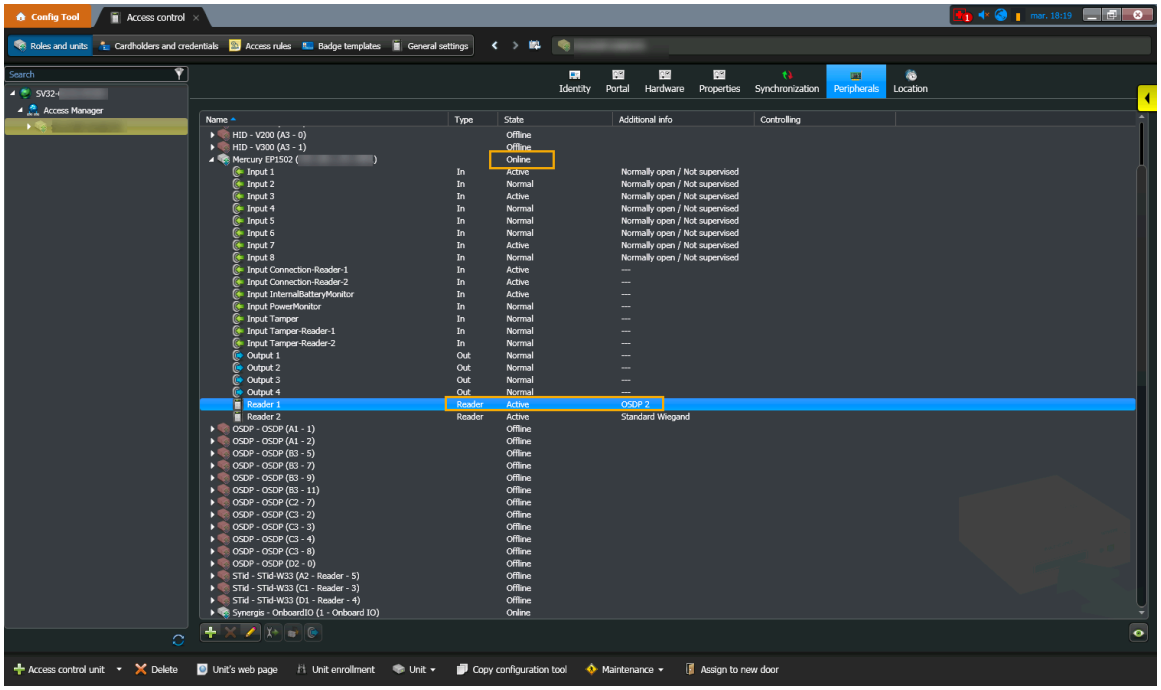
NOTE: Your new QR code reader must be online and available for the QR code reader to transfer the QR code reader configuration settings from the smart card to your QR code reader.

5 Verify your QR code reader is still active after the OCB has been swiped on the wall reader.

a) In Config Tool, open the *Access control* task.

b) In the **Roles and units** view, navigate to and select your access control unit.

c) In the **Peripherals** tab **Name** field, Select your OSDP reader.



d) In the **Peripheral** tab **Name** field, verify that the ODSP reader **State** is Online.

e) In the **Peripheral** tab **Name** field, verify that the Reader **State** is Active.

f) Double-click your reader (**Reader 1**) in the *Edit Reader* dialog, make sure your settings match the reader settings.

The following image shows the default Mercury settings:

After you finish

Add doors to areas.

Automating visitor access and check-in using a macro

You can configure a Security Center macro to automatically check in and grant access to visitors at specified parking entrances or gated facilities. The macro can be used for visitors who need access to a parking entrance or gated facility before they can check in or at locations without self-service kiosks.

Before you begin

- Import a custom card format (QR code credential) in Synergis™
- Enable QR code credentials for visitors

What you should know

This macro is only for use when sites want to use a QR code as a credential to automate visitor check-in. The macro can grant access for a specified parking entrance or gated facility automatically before visitor check-in.

IMPORTANT: This procedure is only compatible with Security Center 5.8 and later.

Procedure

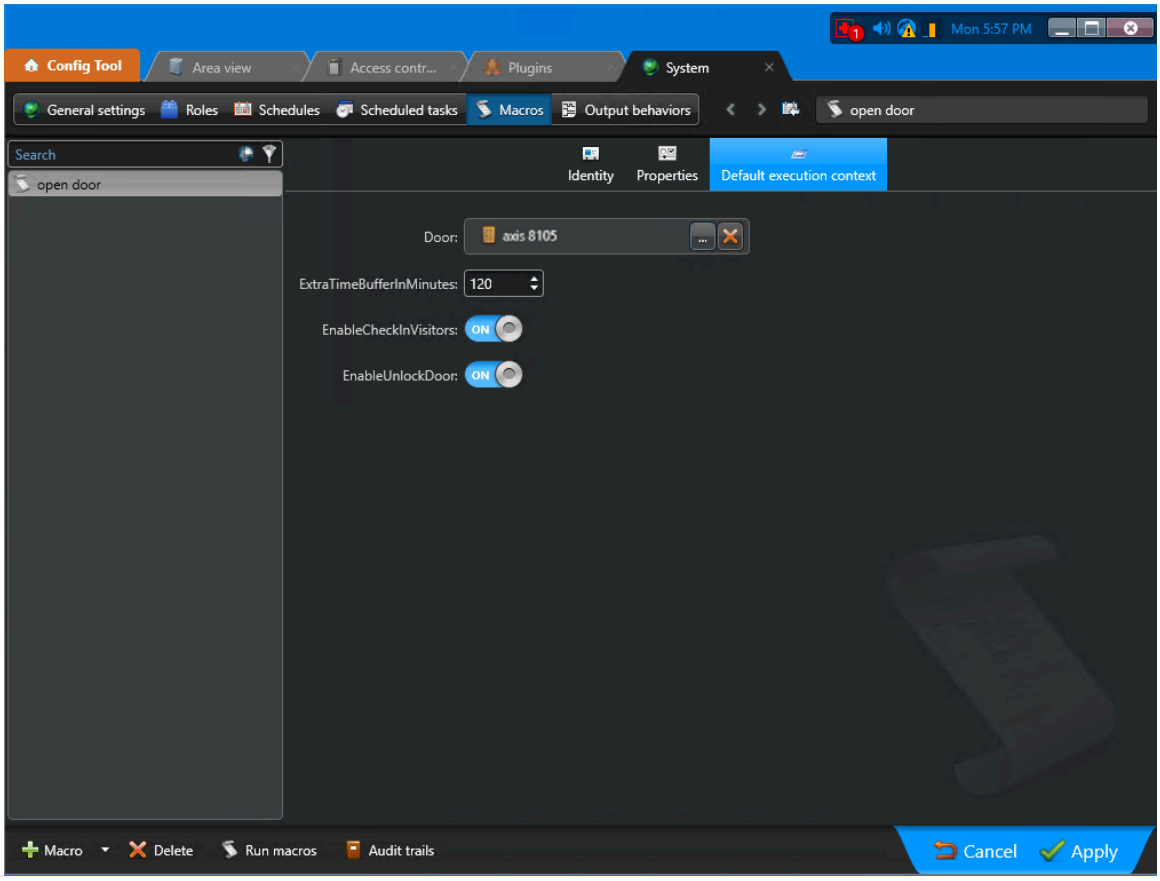
1 From the Config Tool homepage, open the *System* task and click the **Macros** view.

2 Click **Macro** ( ), and enter the macro name.

3 Click the **Properties** tab, and do one of the following:

- Cut and paste the Macro file code into the *Macro definition (C#)* section in the **Properties** tab.
  - Macro 1 (C# example): Compatible with Security Center 5.7 SR4 - 5.11.2.
  - Macro 2 (C# example): Compatible with Security Center 5.11.3 or later.
- Import the source code from a file by clicking **Import from file**, select the file containing the C# code, and then click **Open**.

4 Click the **Default execution context** tab, and configure the settings as follows:



NOTE: The door selected in the **Default execution context** relates to a specific parking entrance or gated facility entrance. When a visitor presents their QR code, the macro is triggered to automatically provide access for this door only.

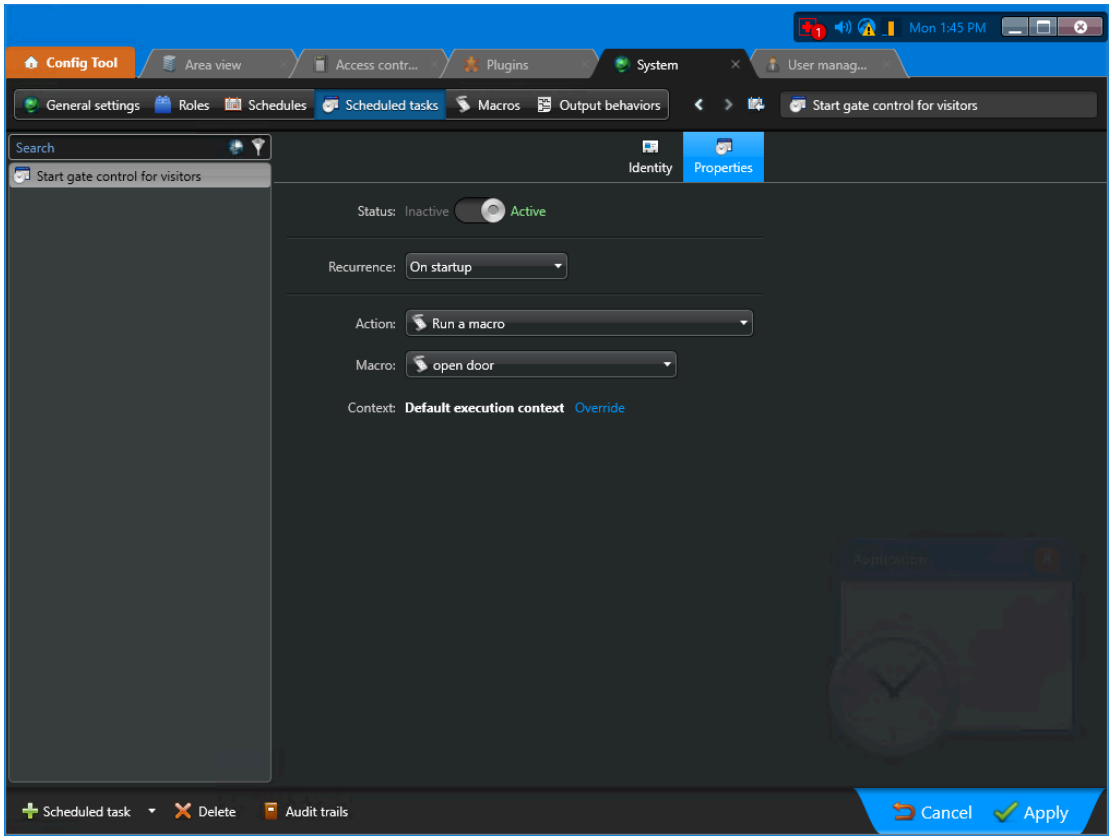
5 Click **Apply**.

6 Click **Run macros**.

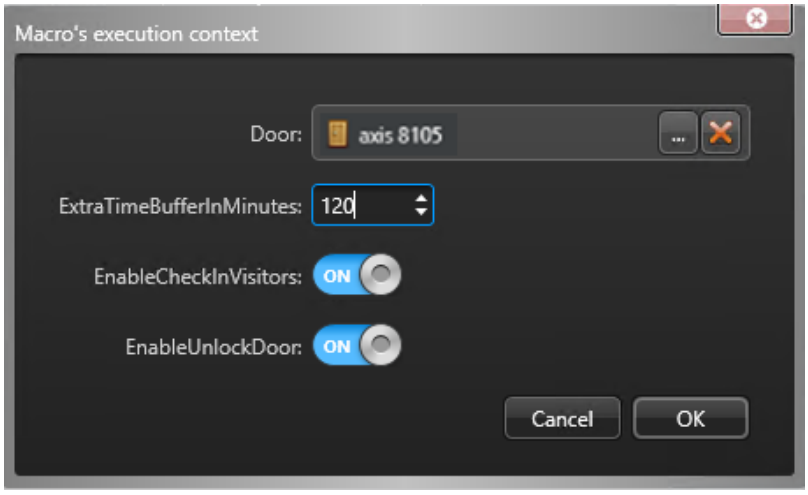
7 From the Config Tool homepage, open the *System* task and click the **Scheduled tasks** view.

a) Click **Scheduled task** (), and enter the scheduled task's name.

b) Configure the **Properties** tab as follows:



c) (Optional) In the *Context* section, click **Override** hyperlink to change the macro's execution context:



The Security Center macro is now configured. It can trigger automatic check-in and grant access to specific parking entrances or gated facilities when the relevant QR code is scanned at the entrance.

10

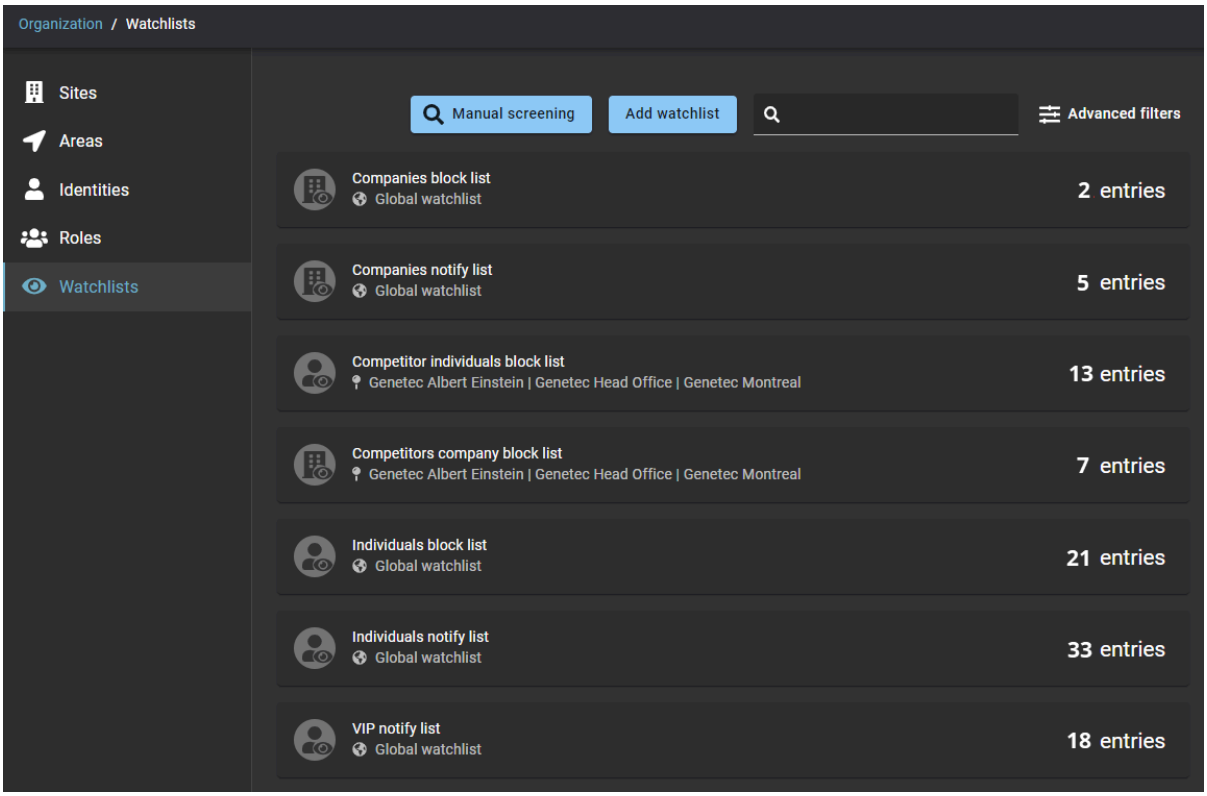
Managing visitor watchlists

Learn how to manage visitor access using watchlists.

This section includes the following topics:

About watchlists

In Genetec ClearID™, watchlists are used to screen visitors at an individual or company level. You can configure the watchlist to perform allow, block, or notify actions at a site or global level.



Screening matches only occur when the following applies:

- Individuals: There is a **First name** and **Last name** match, **First name** and **Last name** alias match, or **Email** address match.
- Companies: There is a **Company** name, company domain, or email address domain match.

There are two types of watchlist:

- Individuals watchlist
- Companies watchlist

An **Individuals** watchlist is used to monitor visitor check-ins for *persons of interest* listed in a watchlist and then take action as specified in the watchlist configuration. For example, you might create an individuals watchlist to automatically block visitors listed in a watchlist and notify watchlist managers. For other situations, you might only notify watchlist managers. You might also create an individuals watchlist to notify all watchlist managers when VIPs check-in at your site.

A **Companies** watchlist is used to monitor visitor check-ins for *companies of interest* listed in a watchlist and then take action as specified in the watchlist configuration. For example, you might create a companies watchlist to automatically block access for people with a **Company** name, company domain, or email address domain that matches specific companies of interest listed in this watchlist.

NOTE: The *Individuals* or *Companies* listed in the entries inside a watchlist can be entered individually or imported as a whole using a *.CSV* file.

Watchlist behavior

The behavior of the watchlists can be configured differently as follows:

- Notify watchlist managers.
- Automatically block visitors listed in a watchlist and notify watchlist managers.

Global watchlists

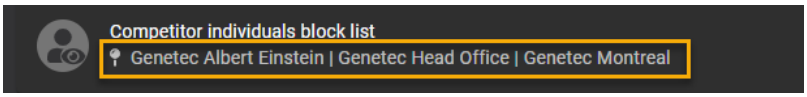
In Genetec ClearID™, a global watchlist is a watchlist that is enforced across all sites in your system.

Global watchlists are highlighted by a world globe identifier ( ) in the watchlist view as follows:

Site watchlists

If a watchlist is not configured as a *global watchlist*, it is considered a site-level watchlist and can be applied to one or more sites.

Site-level watchlists are highlighted by a site identifier ( ), followed by one or more sites, in the watchlist view as follows:



Reasons to block or notify

Reasons to block entry to visitors listed in a watchlist, or notify a watchlist manager might include one or more of the following:

- Serious criminal records by Government agency
- Violent activity or threats
- False Credentials
- Contraband items
- Theft
- Safety violation
- Other reasons

NOTE: Only a *watchlist manager* can view the reasons why visitors are in notify or block watchlists.

Adding watchlist managers

In Genetec ClearID™, a watchlist manager is an identity that is responsible for watchlists. A watchlist manager can create or modify watchlists and add individuals or companies to a watchlist. They are also responsible for configuring watchlists as a site-specific watchlist or a global watchlist. Before you can add or modify watchlists or configure watchlist settings, you must add your watchlist managers.

Before you begin

Create your sites.

What you should know

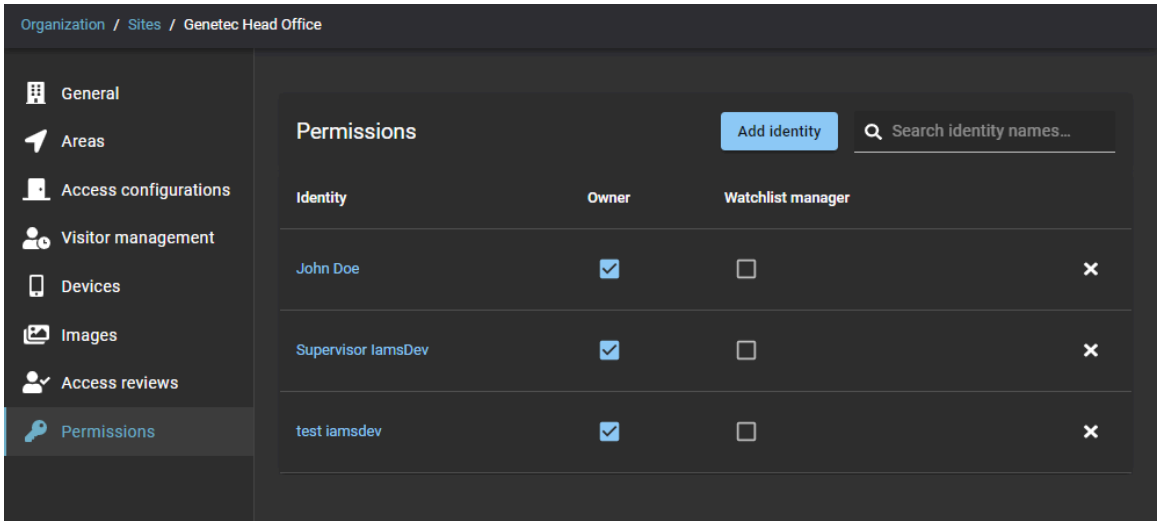
To add watchlist managers in Genetec ClearID™, you must be an account administrator.

Procedure

1 Click **Organization** > **Sites**.

2 Select your site and click **Permissions**.

3 (Optional) Click **Add identity** to add identities to the site **Permissions** list.



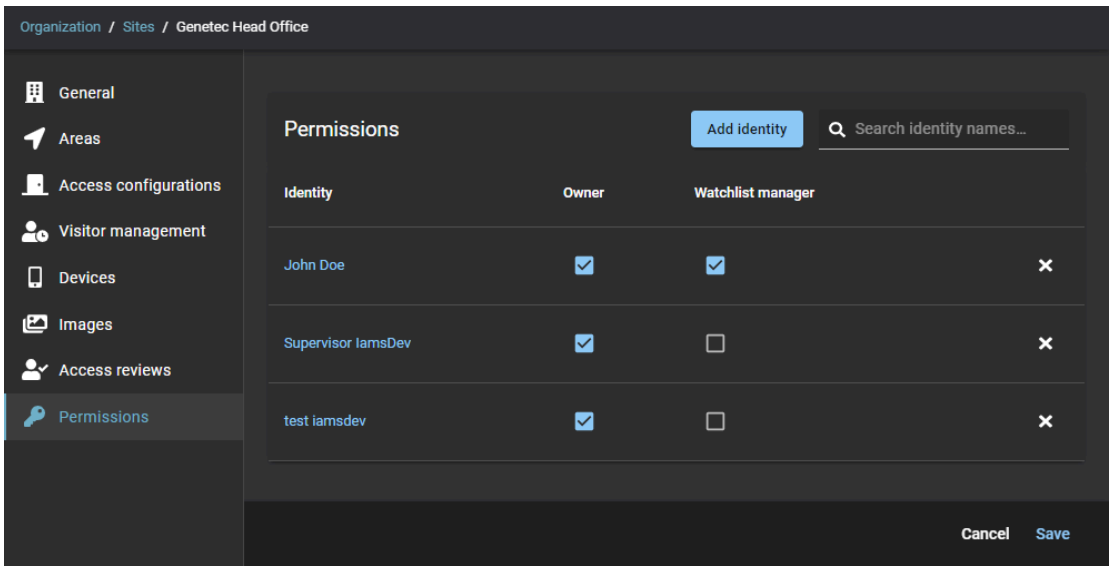
a) Search for or select the identities that you require and click **Add**.

TIP: You can click the identity hyperlink in the **Identity** column to review identity details (company, department, home site, supervisor, and email) and to verify that you have the correct identities in the list.

4 Select the **Watchlist manager** check box to assign watchlist manager permissions to an identity.

a) (Optional) Clear a check box to remove individual permissions that are no longer required from an identity.

b) (Optional) Click ✕ to remove all permissions that are no longer required from an identity.



5 Click **Save**.

After you finish

Add your watchlists.

Adding watchlists

Add individuals watchlists or companies watchlists so that you can screen visitors at an individual level or company level and automatically perform block or notify actions at a site or global level as specified in the watchlist configuration.

Before you begin

Learn about watchlists.

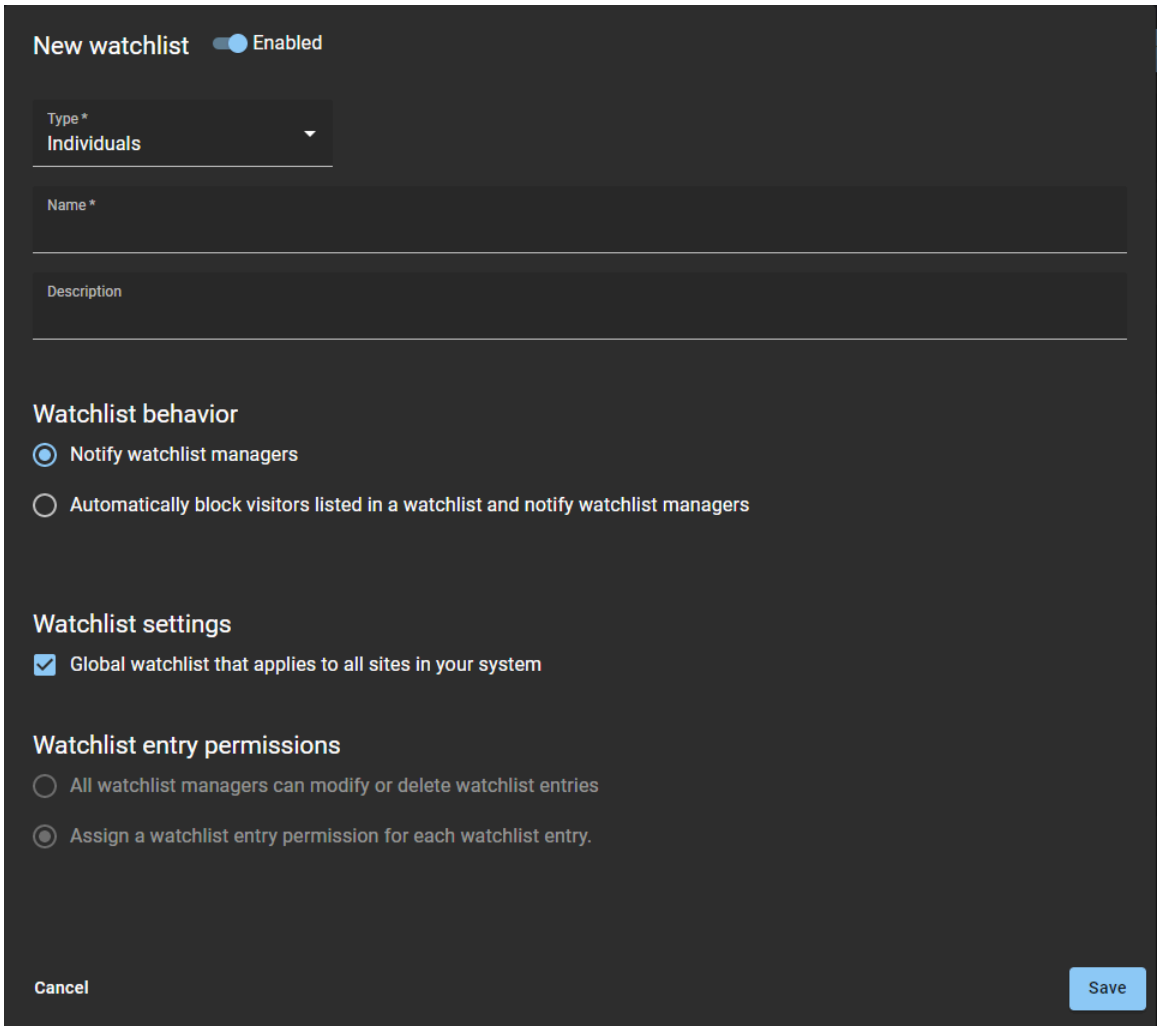
What you should know

- Any *watchlist manager* or account administrator can modify or delete any watchlist that is configured as a *global watchlist*.

Procedure

1 Click **Organization** > **Watchlists**.

2 Click **Add watchlist**.



3 At the top of the new watchlist, click the **Enabled** slider to enable or disable the watchlist.

4 In the **Type** field, select a watchlist type. From the list select either **Individuals** or **Companies**:

- **Individuals:**  An **Individuals** watchlist is used to monitor visitor check-ins for *persons of interest* listed in a watchlist and then take action as specified in the watchlist configuration. For example, you might create an individuals watchlist to automatically block visitors listed in a watchlist and notify watchlist managers. For other situations, you might only notify watchlist managers. You might also create an individuals watchlist to notify all watchlist managers when VIPs check-in at your site.
- **Companies:**  A **Companies** watchlist is used to monitor visitor check-ins for *companies of interest* listed in a watchlist and then take action as specified in the watchlist configuration. For example, you might create a companies watchlist to automatically block access for people with a **Company** name, company domain, or email address domain that matches specific companies of interest listed in this watchlist.

5 Enter a **Name** for the watchlist.

The name of a watchlist can be changed at any time to suit your needs.

TIP: Consider using a *discreet name* where applicable to avoid divulging sensitive information about why someone might be blocked or on a list when the notification is sent to people.

6 Enter a **Description** for the watchlist.

7 In the *Watchlist behavior* section, select one of the following:

- **Notify watchlist managers**
- **Automatically block visitors listed in a watchlist and notify watchlist managers**

8 In the *Watchlist settings* section, choose whether you want a global watchlist or a site-specific watchlist.

- To apply the watchlist to all sites in your system, select **Global watchlist that applies to all sites in your system**.
- To apply the watchlist to one or more specific sites, clear the **Global watchlist that applies to all sites in your system** check box.

a) If you chose to apply your watchlist at a site-level, add your sites and press enter.

b) Repeat at necessary.

NOTE: The *Watchlist entry permissions* section is disabled if the **Global watchlist that applies to all sites in your system** check box is selected.

9 If you have **Watchlist entry permissions** activated for your account, in the *Watchlist entry permissions* section, select one of the following:

- **All watchlist managers can modify or delete watchlist entries**.
- **Assign a watchlist entry permission for each watchlist entry**
- **All watchlist managers can modify or delete watchlist entries:** Specifies that watchlist entries can only be modified or deleted by all watchlist managers for the specified sites.
- **Assign a watchlist entry permission for each watchlist entry:** Specifies that watchlist entry permissions are assigned at a more granular site level in each watchlist entry. This means that only watchlist managers for the site can modify or delete entries.

Example:

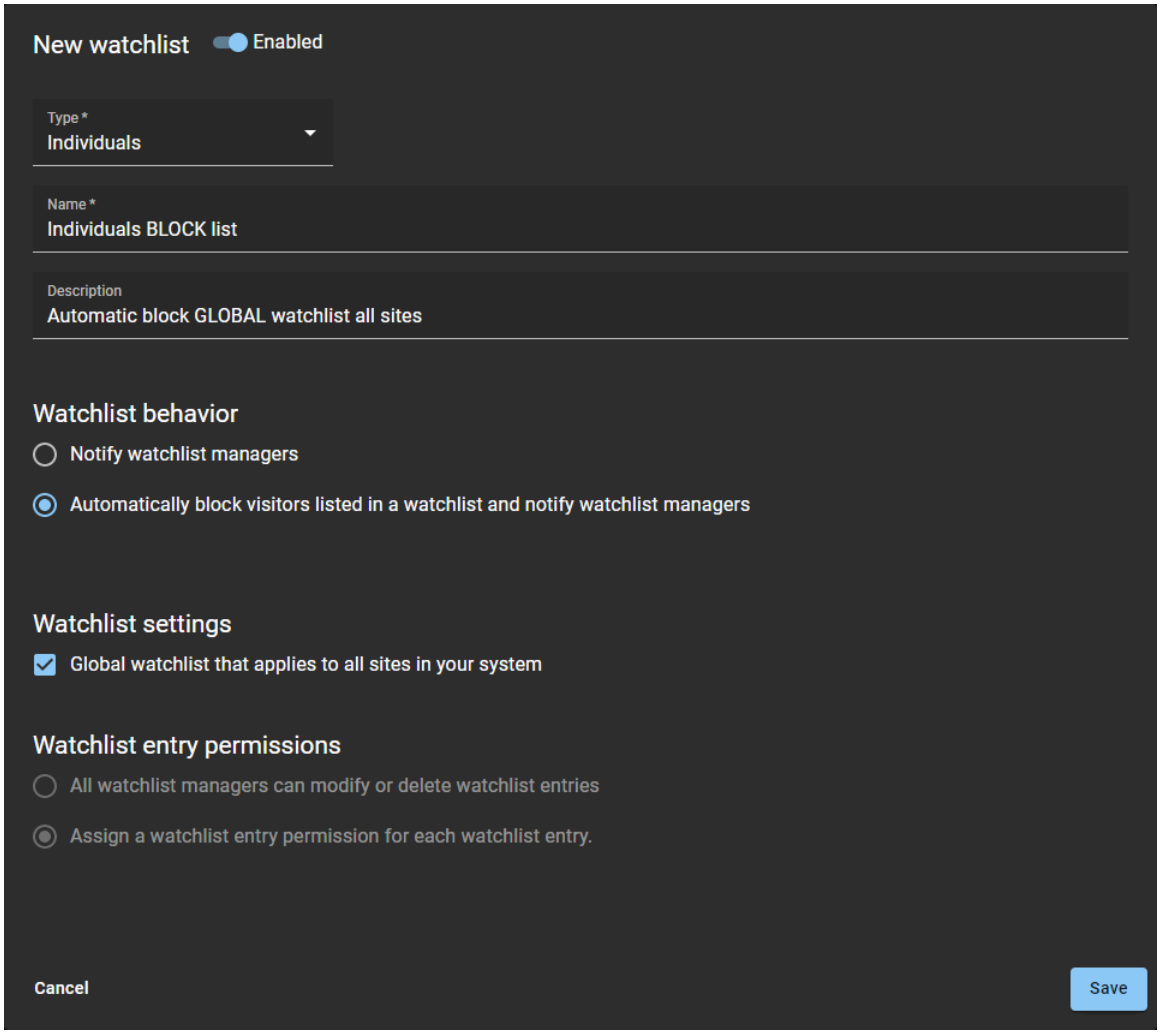


Figure 14: Example 1: Individuals block watchlist - configured as a global watchlist to automatically block visitors and notify watchlist managers.

Example:

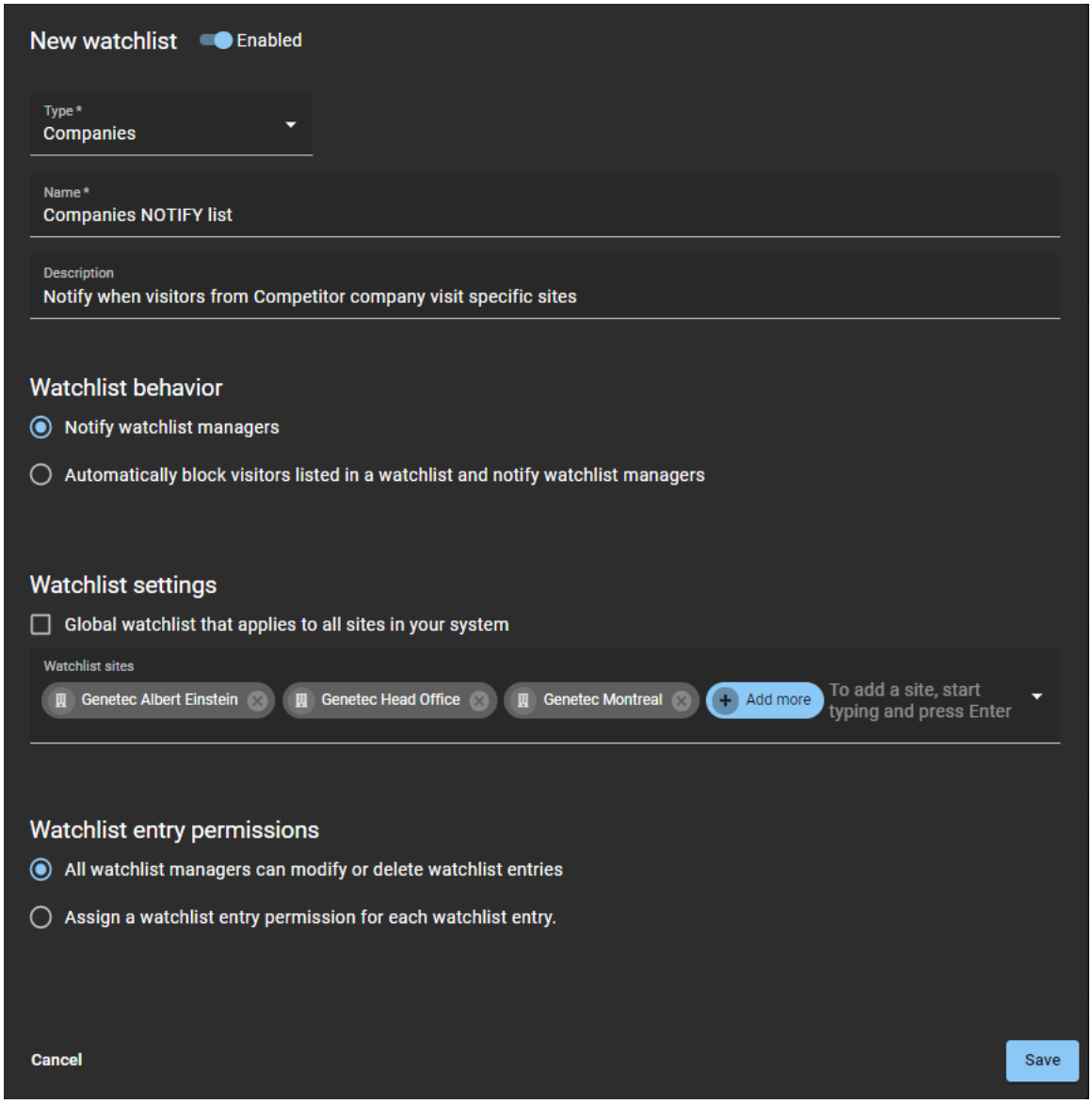


Figure 15: Example 2: Companies notify watchlist - configured as a site-specific watchlist to notify watchlist managers when visitors are from a competitors company.

10 Click **Save**.

Example

After you finish

Do one or more of the following:

- Add your individuals watchlist entries
- Add your companies watchlist entries

Adding an individuals watchlist entry

Add one or more individuals watchlist entries so that you can screen visitors at an individual level and automatically perform block or notify actions at a site or global level as specified in the watchlist configuration.

Before you begin

Add your watchlists.

What you should know

Only a *watchlist manager* can:

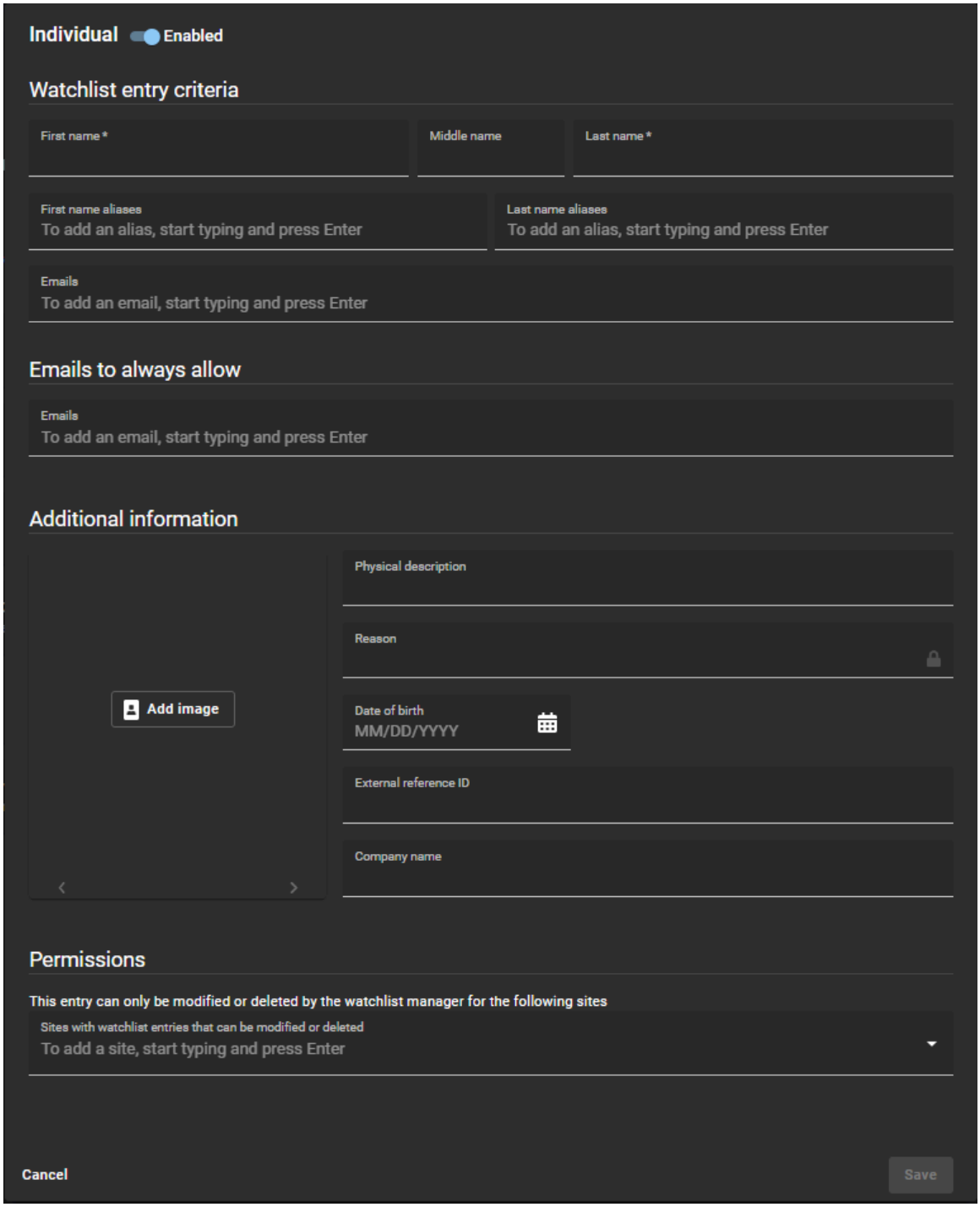
- Add individuals watchlist entries.
- View reasons why visitors are in notify or block watchlists.

Procedure

1 Click **Organization** > **Watchlists**.

2 Select a watchlist from the list.

3 Click **Add entry**.



4 At the top of the watchlist entry click the **Enabled** slider to enable or disable the watchlist entry.

5 In the *Watchlist entry criteria* section, complete the fields:

- **First name:** Enter a first name.
- **Middle name:** Enter a middle name.
- **Last name:** Enter a last name.
- **First name aliases:** Add any known first name aliases and press enter. Repeat as required.

NOTE: Aliases are shown in brackets in the watchlist entries list.

- **Last name aliases:** Add any known last name aliases and press enter. Repeat as required.
- **Emails:** Add any known emails and press enter. Repeat as required.

6 In the *Emails to always allow* section, add any emails that you want to exclude from the watchlist screening process.

This section is used to add any similar emails or false positive email matches that you might want to always allow. For example, a possible match that happens to have the same name details, but is a different person with a different email address that should be allowed.

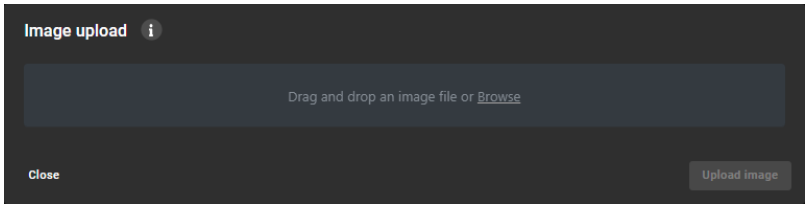
7 In the *Additional information* section, complete any additional fields that you require:

- **Physical description:** Enter a physical description.
- **Reason:** Enter a reason for the block or notify.

  NOTE: The **Reason** field can contain sensitive private information, and can only be viewed by the watchlist manager for the site.
- **Date of birth:** Use the calendar picker to enter a date of birth.

  The date of birth information is useful additional information when a visitor check-in matches multiple people with the same name. It can be used to validate an identity and also eliminate duplicates or false positive matches.
- **External reference ID:** Enter an external reference ID.
- **Company name:** Enter a company name.

8 In the *Additional information* section, Click **Add image** to add one or more images if required.



a) Drag and drop an image or click **Browse** to select the image file that you require and click **Upload image**.

b) Repeat for each additional image you want to upload.

c) (Optional) Click **Delete image** for any images you no longer require.

TIP: Click **Open in new tab** to view the image full size.

9 If you have **Watchlist entry permissions** activated for your account, in the *Permissions* section, add the sites that you require.

10 Click **Save**.

Example

After you finish

Test your watchlist entries.

Adding a companies watchlist entry

Add one or more companies watchlist entries so that you can screen visitors at a company level and automatically perform block or notify actions at a site or global level as specified in the watchlist configuration.

Before you begin

Add your watchlists.

What you should know

Only a *watchlist manager* can:

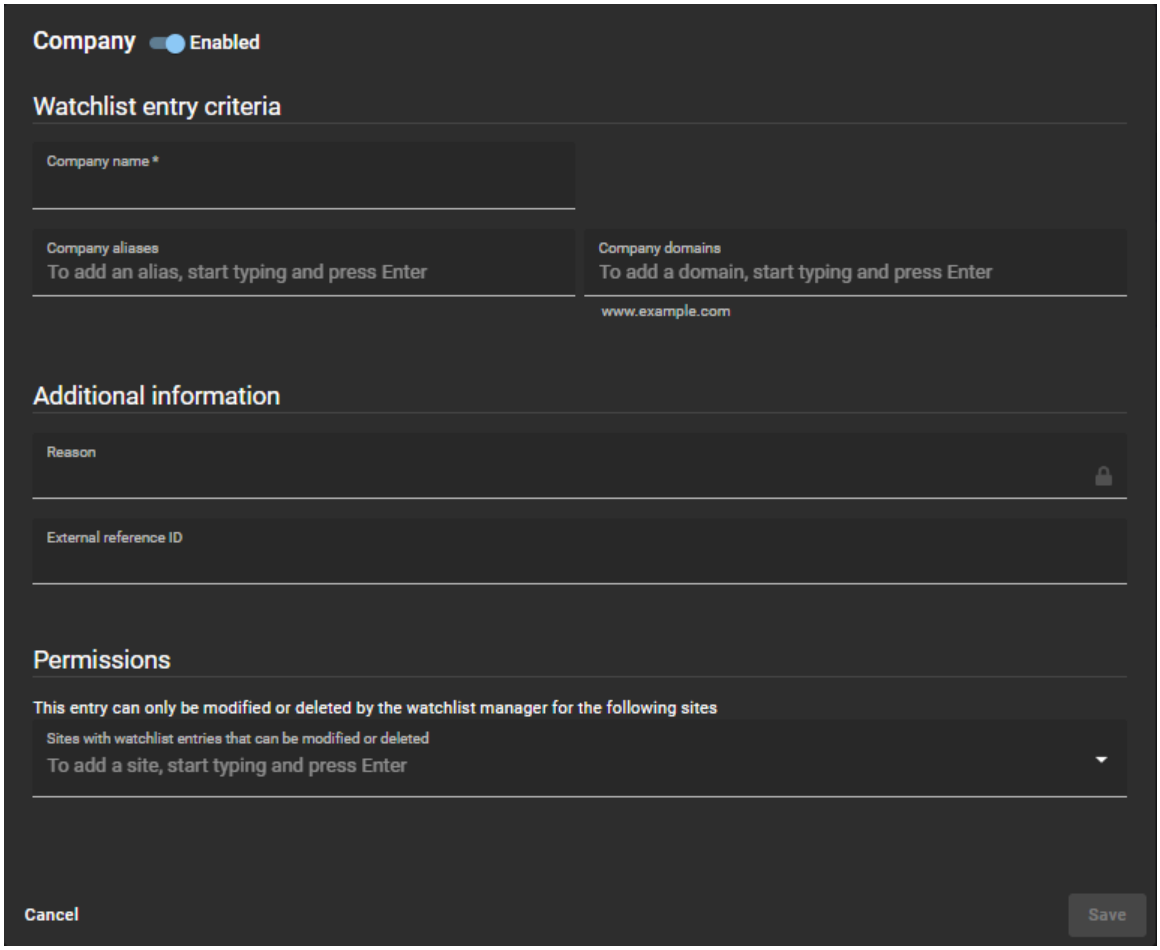
- Add companies watchlist entries.
- View reasons why visitors are in notify or block watchlists.

Procedure

1 Click **Organization** > **Watchlists**.

2 Select a watchlist from the list.

3 Click **Add entry**.



4 At the top of the watchlist entry click the **Enabled** slider to enable or disable the watchlist entry.

5 In the *Watchlist entry criteria* section, complete the fields:
   - **Company name:** Enter a company name.
   - **Company aliases:** Add any known company aliases and press enter. Repeat as required.
     NOTE: Aliases are shown in brackets in the watchlist entries list.
   - **Company domains:** Add any known company domains and press enter. Repeat as required.
6 In the *Additional information* section, complete any additional fields that you require:
   - **Reason:** Enter a reason for the block or notify.
     NOTE: The **Reason** field can contain sensitive private information, and can only be viewed by the watchlist manager for the site.
   - **External reference ID:** Enter an external reference ID.
7 If you have **Watchlist entry permissions** activated for your account, in the *Permissions* section, add the sites that you require.
8 Click **Save**.

Example

After you finish

Test your watchlist entries.

Importing watchlist entries from a file

To accelerate your watchlist configuration and setup, you can import your watchlist entries from a *.CSV* file. You can also download a sample *.CSV* file to help you prepare your watchlist entries file in the correct format.

Before you begin

Prepare your watchlist entries in a *.CSV* file, ready for import.

What you should know

Only a *watchlist manager* can import watchlist entries.

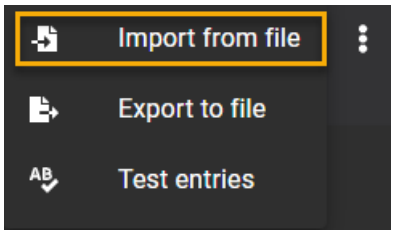
You can import pre-existing watchlist entry data using a *.CSV* file from one or more of the following sources:

- Sharepoint
- Excel
- Be on (the) look-out (BOLO) list - a watchlist term typically used in the field of policing.
- No entry list
- Deny entry list (DEL)

Procedure

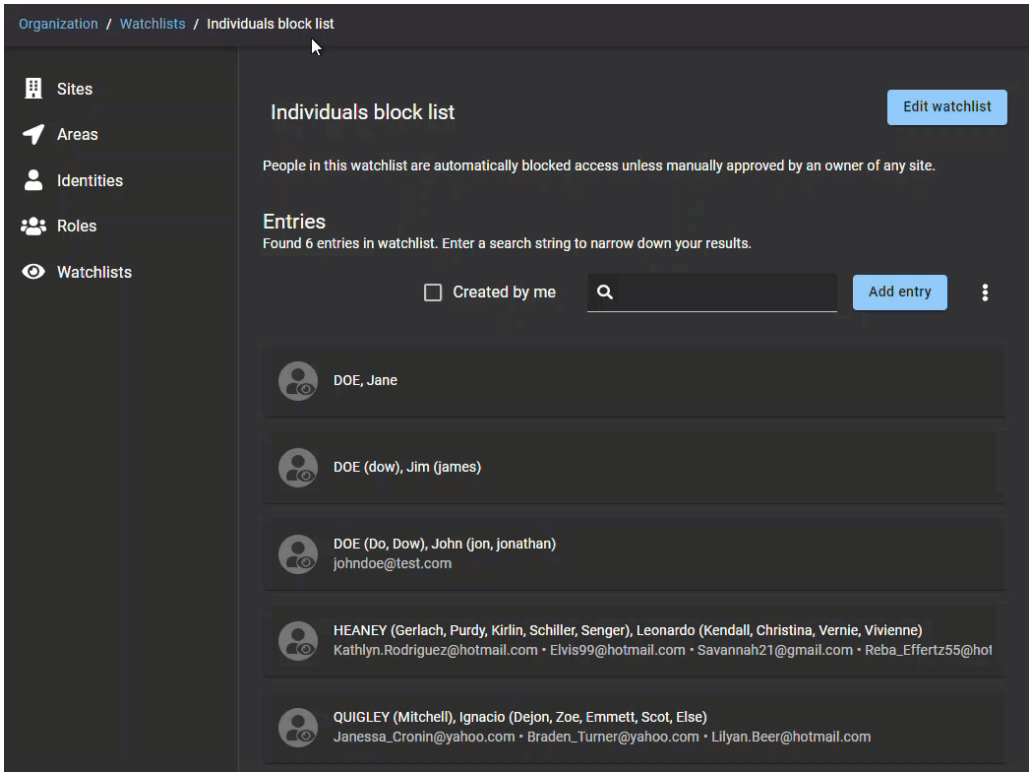
1 Click **Organization** > **Watchlists**.
2 Select a watchlist.

3 Click ⋮ and click **Import from file**.



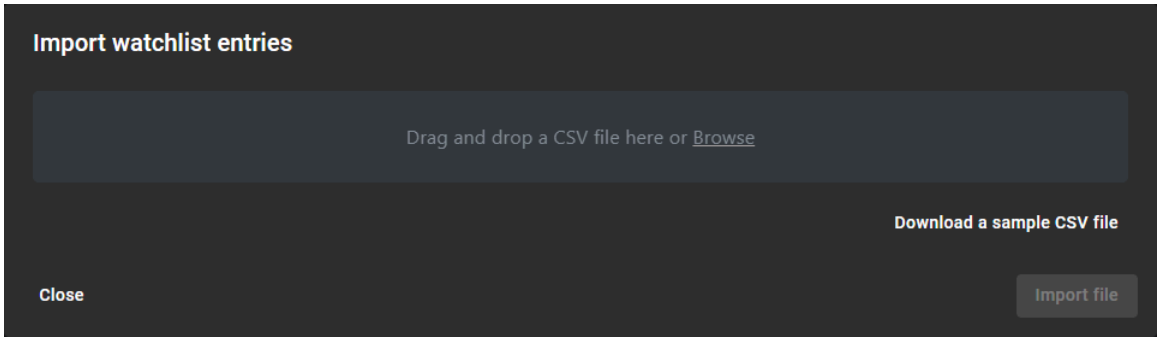
4 (Optional) Click **Download a sample CSV file** to help you prepare a watchlist entries file in the correct format.

NOTE: The columns and entries in the sample CSV file (*watchlist-sample.csv*) can vary depending on the watchlist type (**Individuals** or **Companies**) you have selected when you download the sample.

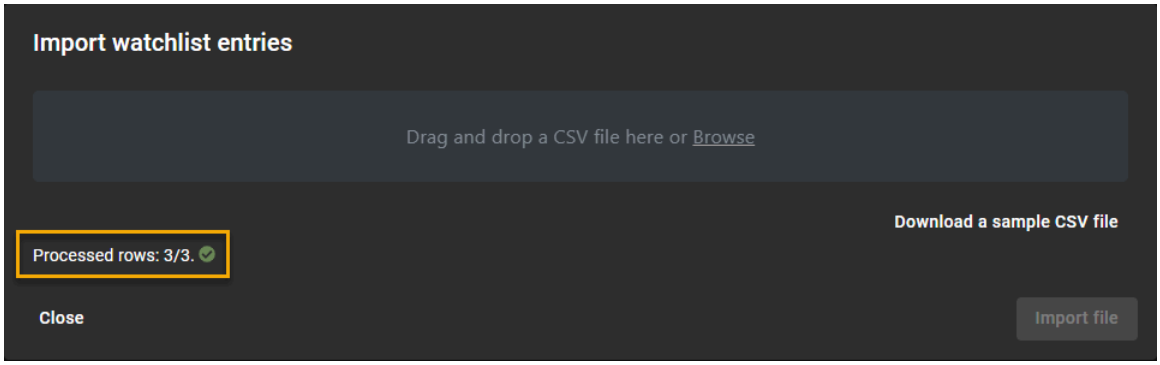


TIP: Click the animation to view full size.

5 In the *Import watchlist entries* dialog, drag and drop a CSV file or click **Browse** to select a file.



6 Click **Import file**.



NOTE: The **Processed rows** field in the *Import watchlist entries* dialog indicates how many watchlist entries have been processed.

After you finish

Test your watchlist entries.

Exporting watchlist entries to a file

You can export your watchlist entries to a *.CSV* file for mass editing or backup purposes. For example, you could export your watchlist entries to Microsoft Excel, edit the entries, remove any duplicates, and then merge watchlists or consolidate watchlist entries into a new watchlist.

Before you begin

Do one or more of the following:

- Add your individuals watchlist entries.
- Add your companies watchlist entries.
- Import your watchlist entries.

What you should know

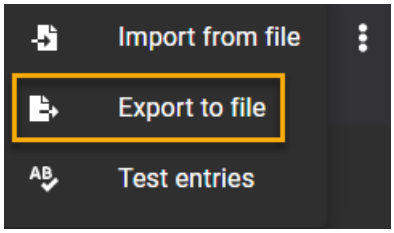
Only a *watchlist manager* can export watchlist entries.

Procedure

1 Click **Organization** > **Watchlists**.

2 Select a watchlist.

3 Click and click **Export to file**.



The file is exported as a *.CSV* file to your browsers default download location. By default the exported file is created using the name of your watchlist. For example, *Individuals block list.csv*.

4 Follow your browser prompts to complete downloading the exported file.

After you finish

(Optional) Manipulate the watchlist entry data as required.

Testing watchlist entries

To test new watchlist entries, you can enter the details of a person of interest or a company of interest to verify if there is a screening match.

Before you begin

Do one or more of the following:

- Add inidividuals watchlist entries
- Add companies watchlist entries

What you should know

Only a *watchlist manager* can test watchlist entries.

Screening matches only occur when the following applies:

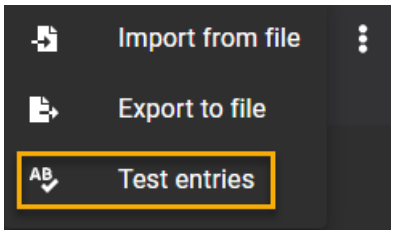
- Individuals: There is a **First name** and **Last name** match, **First name** and **Last name** alias match, or **Email** address match.
- Companies: There is a **Company** name, company domain, or email address domain match.

Procedure

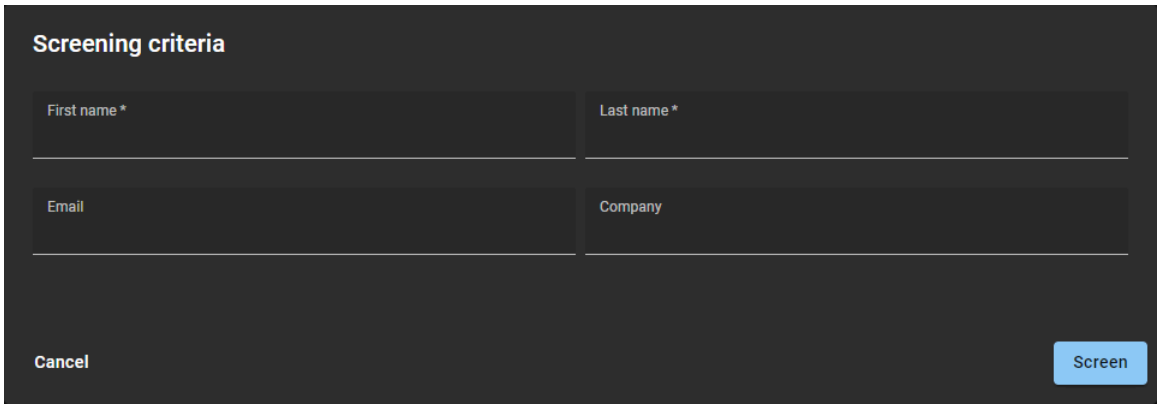
1 Click **Organization** > **Watchlists**.

2 Select a watchlist.

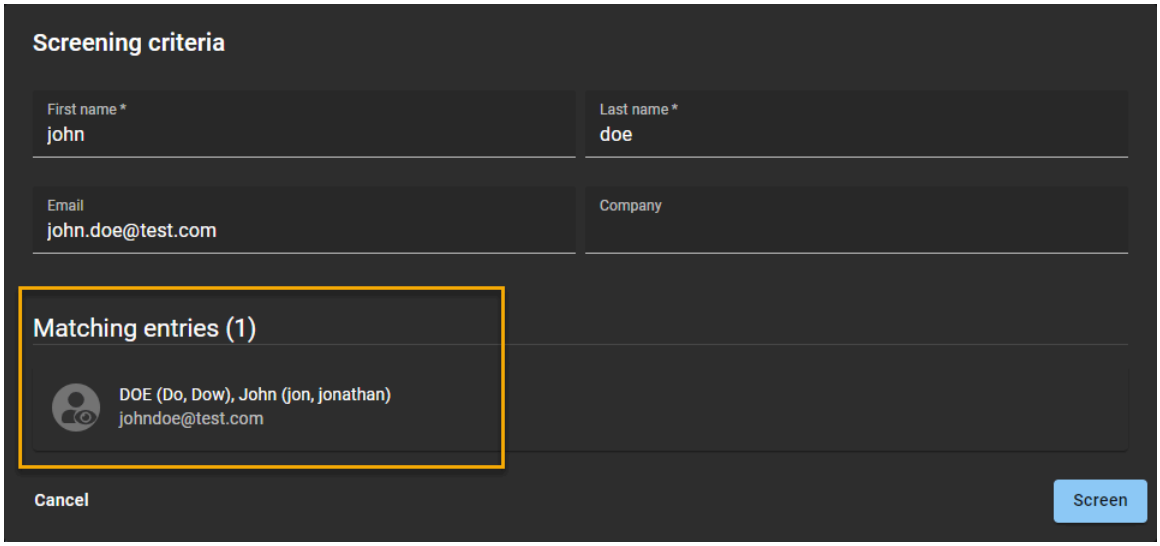
3 Click ⋮ and click **Test entries**.



4 In the *Screening criteria* dialog, enter the details of the entry that you want to test
NOTE: Mandatory fields are highlighted by an asterisk (*).



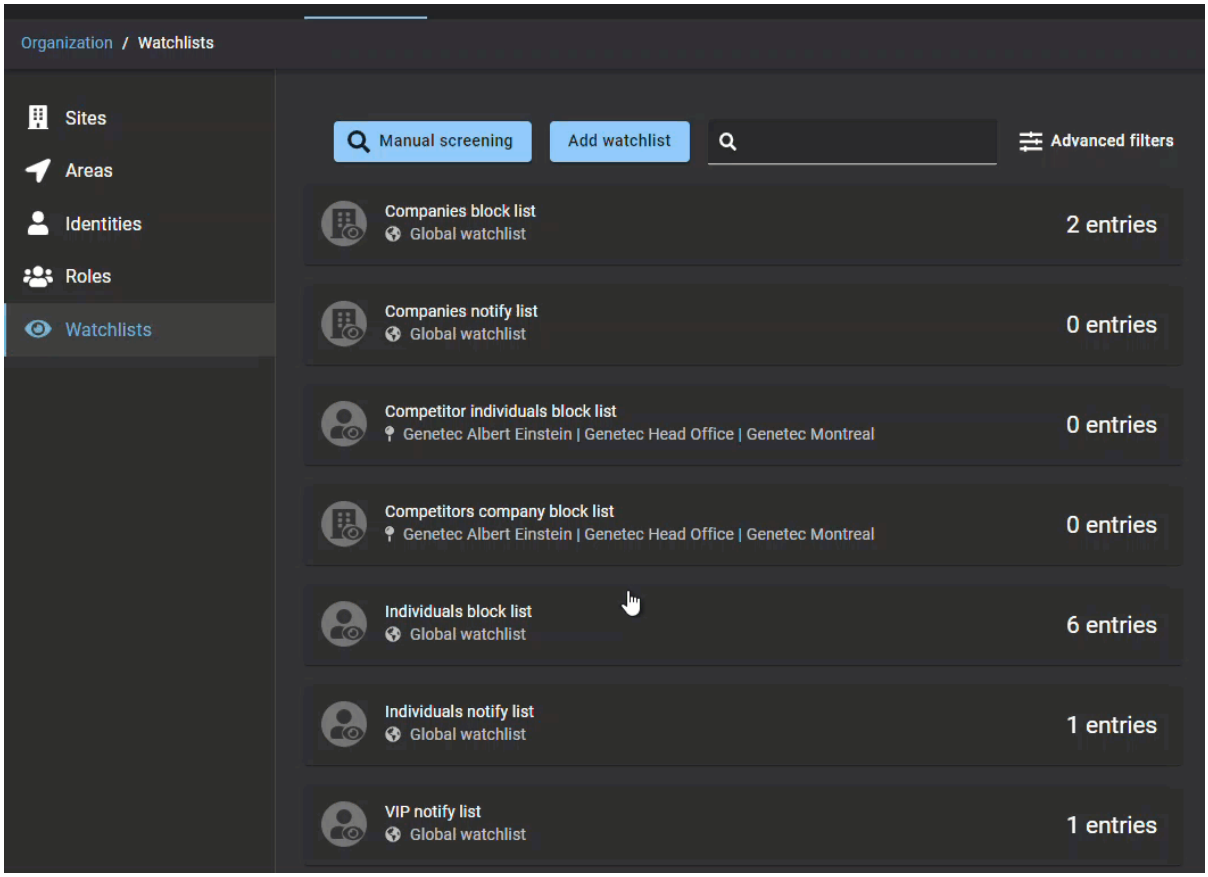
5 Click **Screen**.
Matching entries are shown in the *Matching entries* list in the *Screening Criteria dialog*.



6 (Optional) Click a matching entry in the list to view the complete details of the watchlist entry.

7 Click **Cancel** to exit the *Screening Criteria dialog*.

Example



Deleting watchlist entries

A watchlist manager can delete individuals watchlist entries or companies watchlist entries that have become obsolete or are no longer required.

Before you begin

Do one or more of the following:

- Add inidividuals watchlist entries
- Add companies watchlist entries

What you should know

A watchlist entry can only be deleted by the *watchlist manager* who created it.

Procedure

1 Click **Organization** > **Watchlists**.

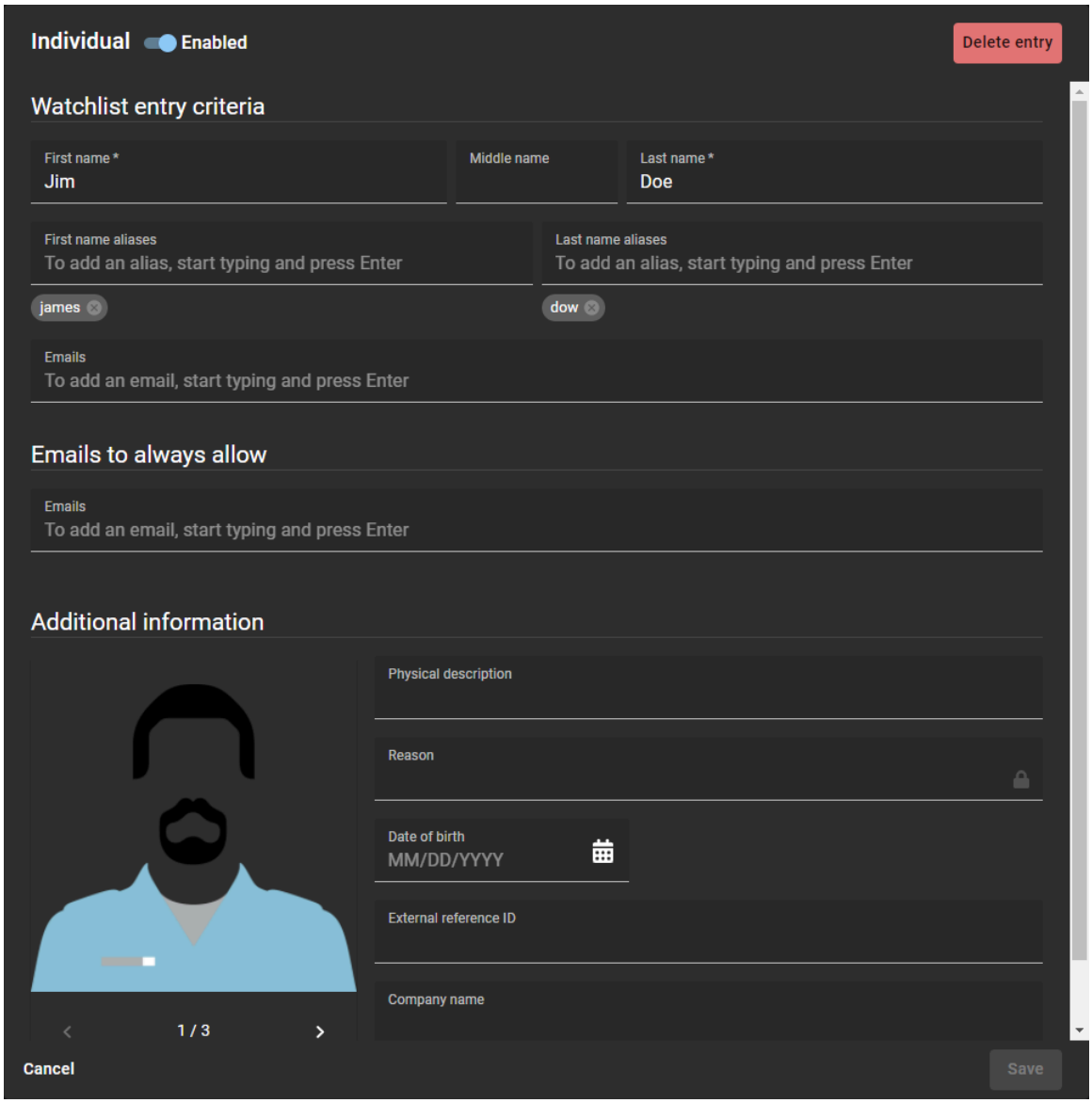
2 Select a watchlist from the list.

3 (Optional) If the watchlist entries list is long, select **Created by me** to reduce the displayed results.

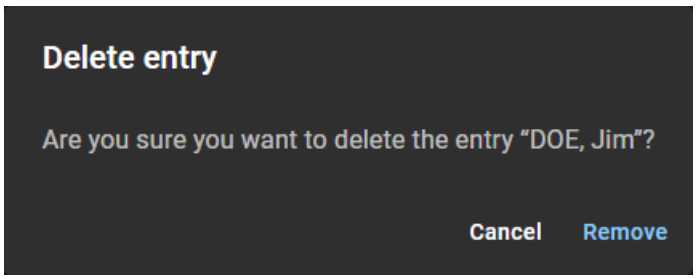
4 Do one of the following:

- Click to select a watchlist entry in the list
- Search for the entry that you want to delete.

5 Scroll to the bottom of the watchlist entry and click **Delete entry**.



6 In the *Delete entry* dialog, click **Remove** to confirm your deletion.



Modifying watchlists

After you add your watchlists, you can modify some of the watchlist settings. A watchlist manager can disable a watchlist, change the Name or Description, and change watchlist behavior.

Before you begin

Add your watchlists.

What you should know

When modifying a watchlist the following applies:

- You cannot change a *global watchlist* to become a *site watchlist*.
- You cannot change a *site watchlist* to become a *global watchlist*.
- You cannot modify **Watchlist entry permissions** after a watchlist is created.

Any *watchlist manager* or account administrator can modify any watchlist that is configured as a *global watchlist*.

Procedure

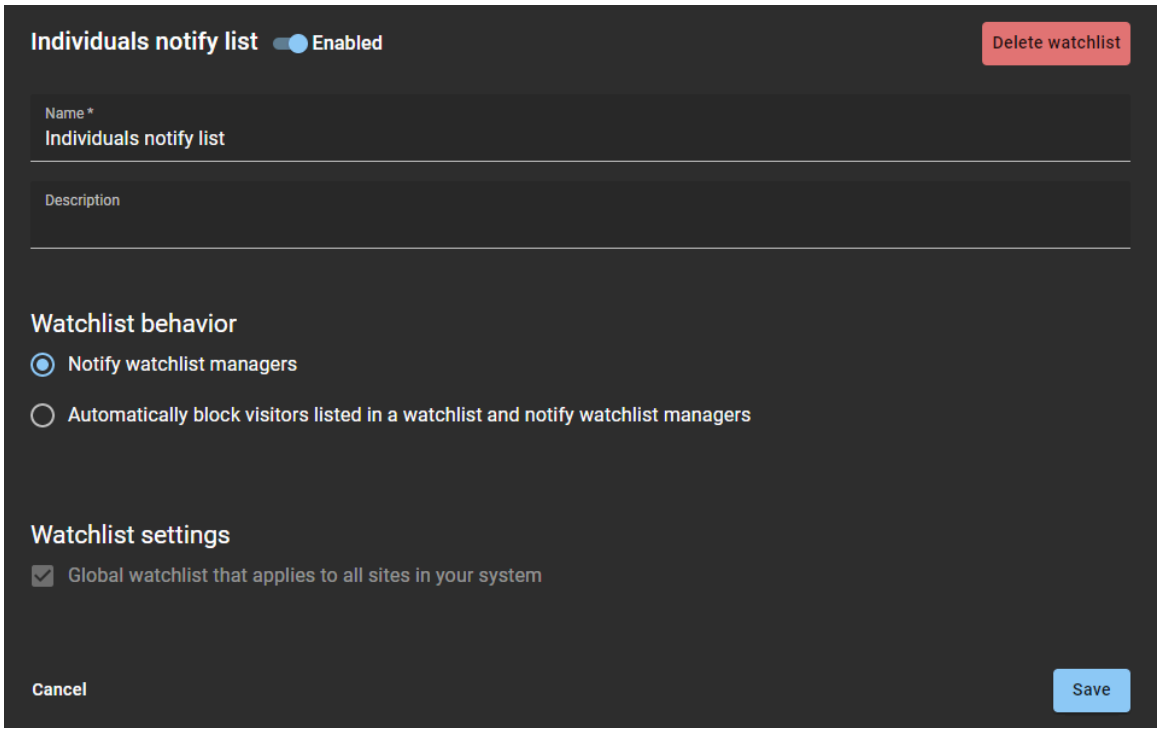
1 Click **Organization** > **Watchlists**.

2 (Optional) Use the search box to find a specific watchlist.

3 (Optional) Click **Advanced filters** to filter the list results by **Site** or **Watchlist type**.
Select the filter options that you require:
   a) From the **Site** list, select a site.
   b) From the **Watchlist types** list, select a watchlist type.
   c) Click **Close**.

4 Select a watchlist from the list.

5 Click **Edit watchlist**.



6 Modify the watchlist as required by doing one or more of the following:

a) At the top of the Watchlist dialog, click the **Enabled** slider to enable or disable the watchlist.

For example, you might want to disable a large watchlist and refer to it while restructuring entries into other watchlists.

b) In the **Name** field, change the watchlist **Name**.

c) In the **Description** field, change the watchlist **Description**.

d) In the *Watchlist behavior* section, modify the **Watchlist behavior**. Select either **Notify watchlist managers** or **Automatically block visitors listed in a watchlist and notify watchlist managers**.

7 Click **Save**.

Deleting watchlists

A watchlist manager can delete watchlists that have become obsolete or are no longer required. Or a watchlist might need to be deleted in situations where you need to change a *site watchlist* to a *global watchlist* or vice versa.

Before you begin

Add your watchlists.

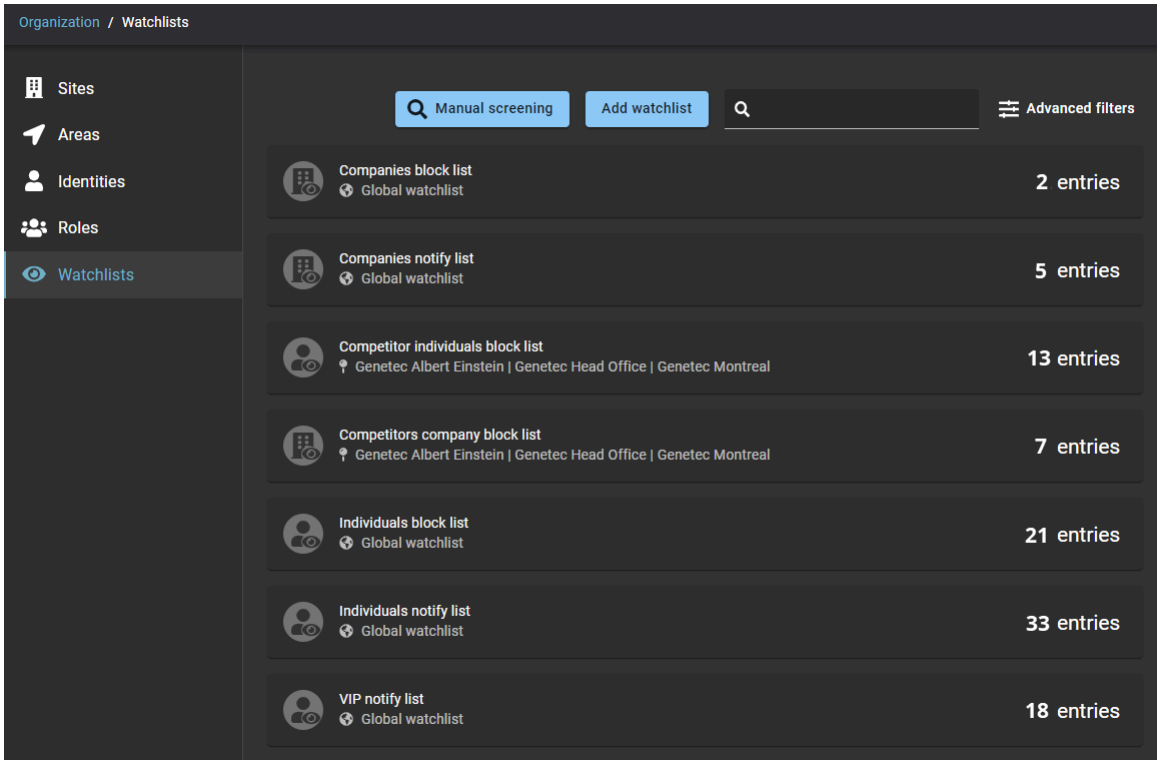
What you should know

A watchlist can only be deleted by the *watchlist manager* who created it.

NOTE: Any watchlist manager or account administrator can delete any watchlist that is configured as a global watchlist.

Procedure

1 Click **Organization** > **Watchlists**.



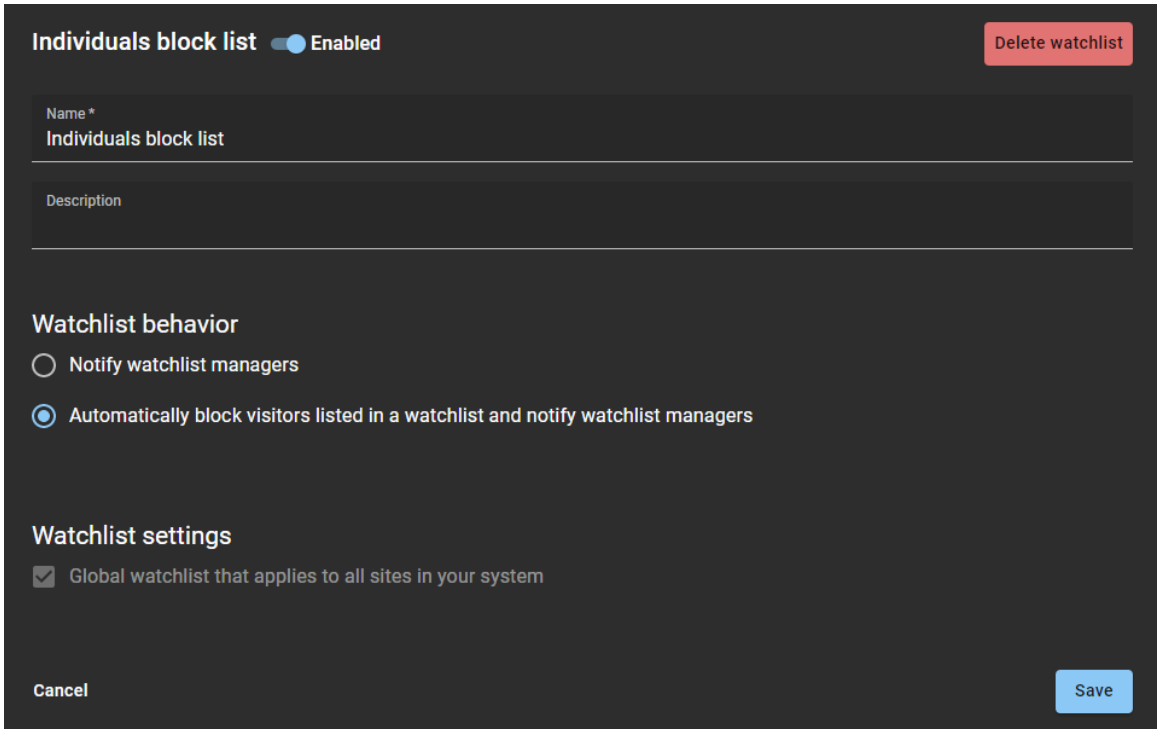
2 (Optional) Use the search box to find a specific watchlist.

3 (Optional) Click **Advanced filters** to filter the list results by **Site** or **Watchlist type**.
Select the filter options that you require:
   a) From the **Site** list, select a site.
   b) From the **Watchlist types** list, select a watchlist type.

4 Select a watchlist from the list.

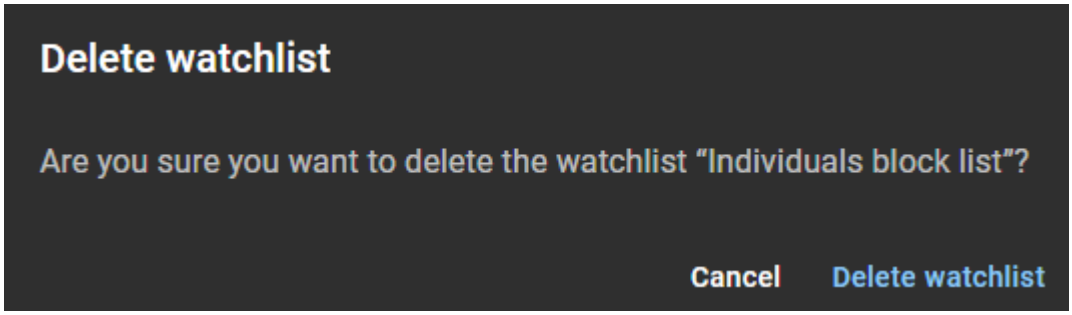
5 Click **Edit watchlist**.

6 Verify you have the required watchlist and click **Delete watchlist**.



Do one of the following:

a) In the *Delete watchlist* dialog, click **Delete watchlist** to confirm the deletion.



b) (Optional) Click **Cancel** to abandon the deletion.

Screening visitors manually

To manually screen a visitor, you can enter the visitor details to check if there is a screening match. For example, testing a new watchlist to find watchlists that contain a person or company of interest, or to validate a new hire against an internal watchlist.

Before you begin

Add your individual watchlist entries.

What you should know

Only *watchlist managers* or account administrators can manually screen visitors for the following:

- Finding watchlists that contain a person of interest.
- Validating a new hire against an internal **Individuals** watchlist or **Companies** watchlist.

  Screening matches only occur when the following applies:

  - Individuals: There is a **First name** and **Last name** match, **First name** and **Last name** alias match, or **Email** address match.
  - Companies: There is a **Company** name, company domain, or email address domain match.

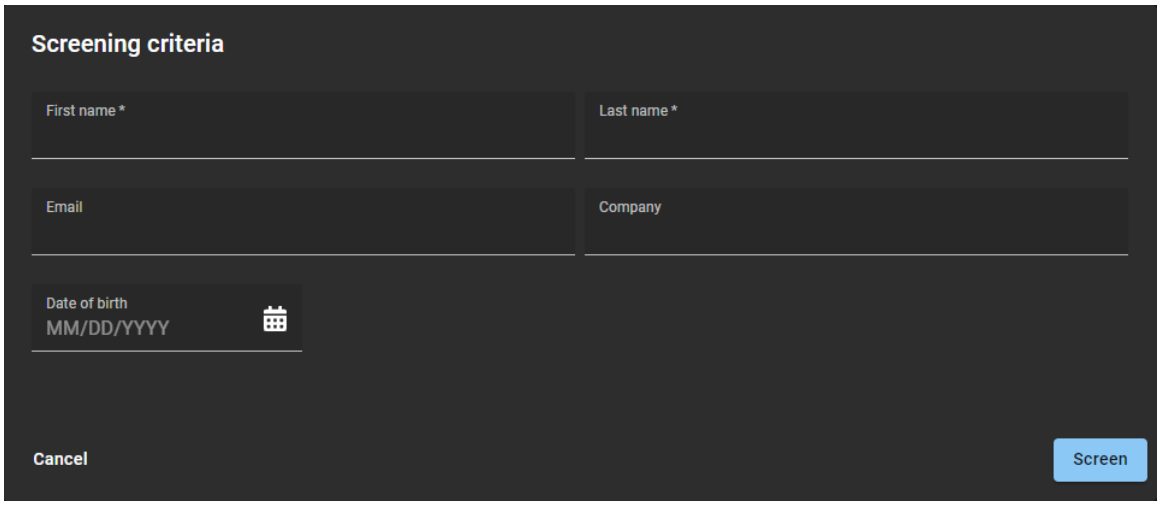
If *security* or *reception* need to manually screen visitors, the *Watchlist manager* permission must be added to their identity.

Procedure

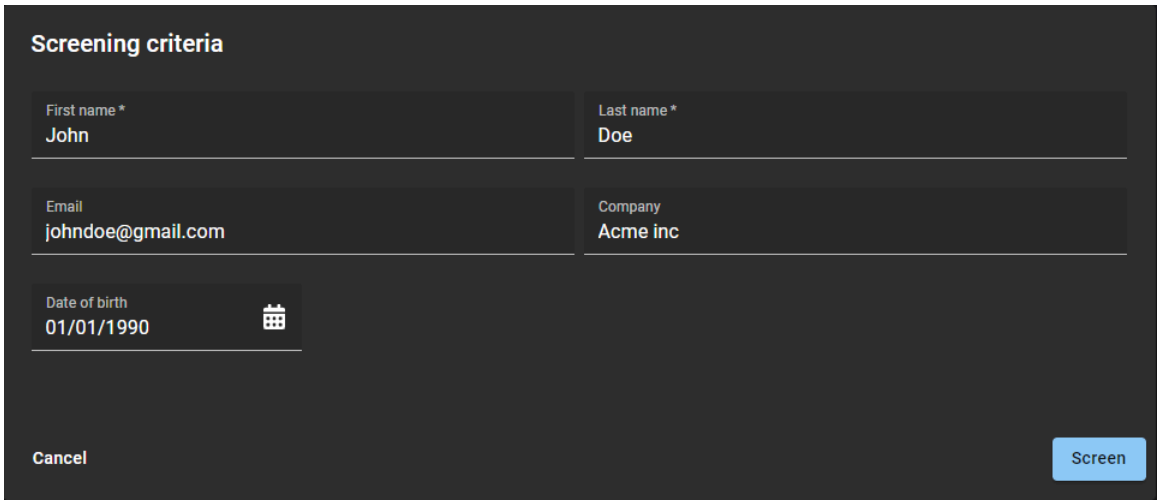
1 Click **Organization** > **Watchlists**.

2 Click **Manual screening**.

3 In the *Screening criteria* dialog, complete the details for the visitor that you want to manually screen.
NOTE: Mandatory fields are highlighted by an asterisk (*).

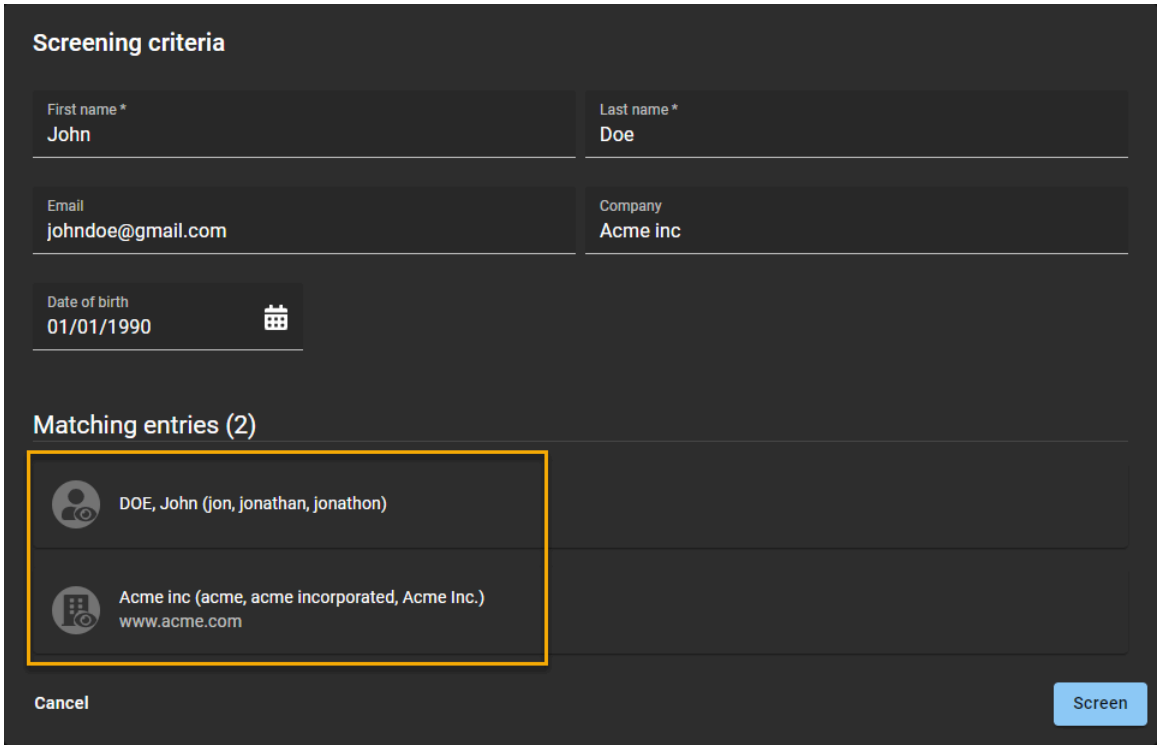


- **First name:** Enter a first name.
- **Last name:** Enter a last name.
- **Email:** Enter the visitor's email address.
- **Company:** Enter the visitor's company name.
- **Date of birth:** Use the calendar picker to select the visitor's date of birth. The date of birth information is useful additional information when a visitor check-in matches multiple people with the same name. It can be used to validate an identity and also eliminate duplicates or false positive matches.



4 Click **Screen**.

Matching entries for individuals or companies are shown in the *Matching entries* list in the *Screening Criteria dialog*.

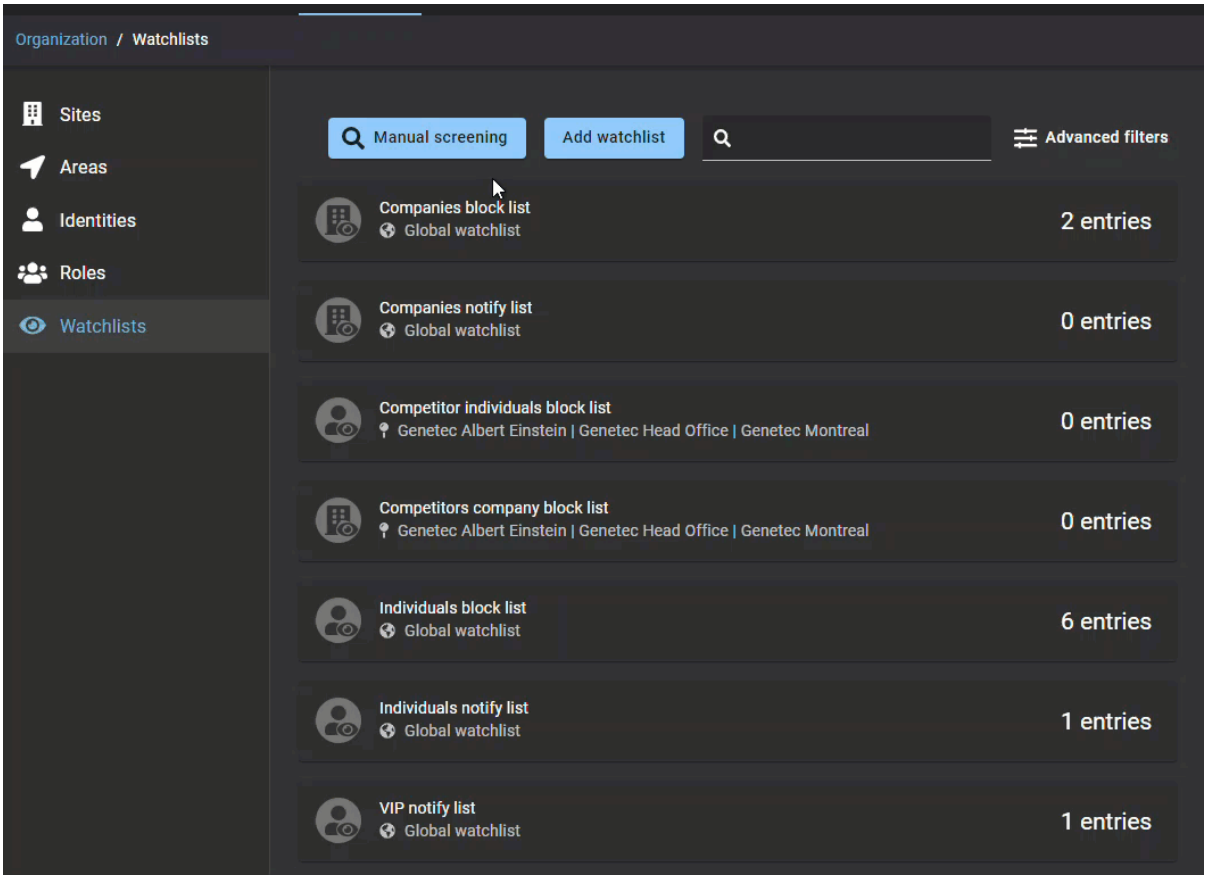


5 (Optional) Click an individual in the **Matching entries** list to view the complete details of the individuals watchlist entry.

6 (Optional) Click a company in the **Matching entries** list to view the complete details of the companies watchlist entry.

7 Click **Cancel** to exit the *Screening Criteria dialog*.

Example



TIP: Click the animation to view full size.

Related Topics

Adding watchlist managers on page 428

Unblocking visitors blocked by a watchlist

To unblock visitors incorrectly blocked by a watchlist, you can add the visitors email to an always allow list.

Before you begin

Add your individuals watchlist entries.

What you should know

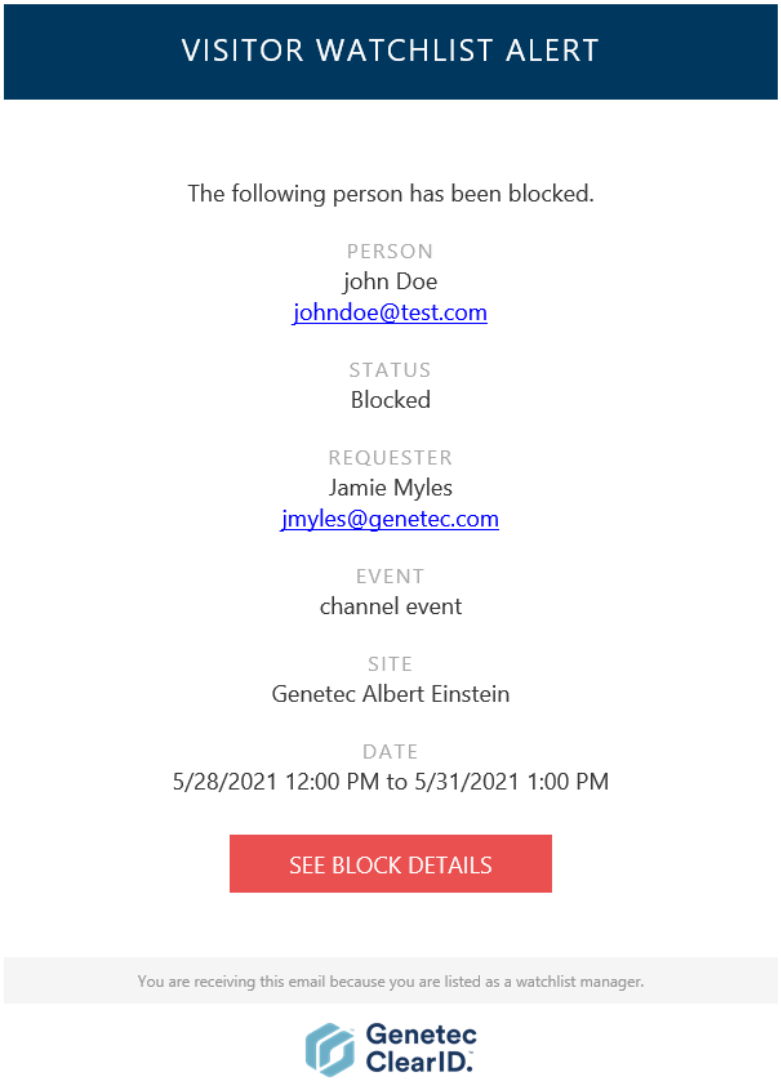
Only a *watchlist manager* or account administrator can unblock a blocked visitor.

- Individuals watchlist email match cannot be set to **Always allow**.
- Company watchlist entry matches cannot be set to **Always allow**.
- Notify watchlist entry matches cannot be set to **Always allow**.

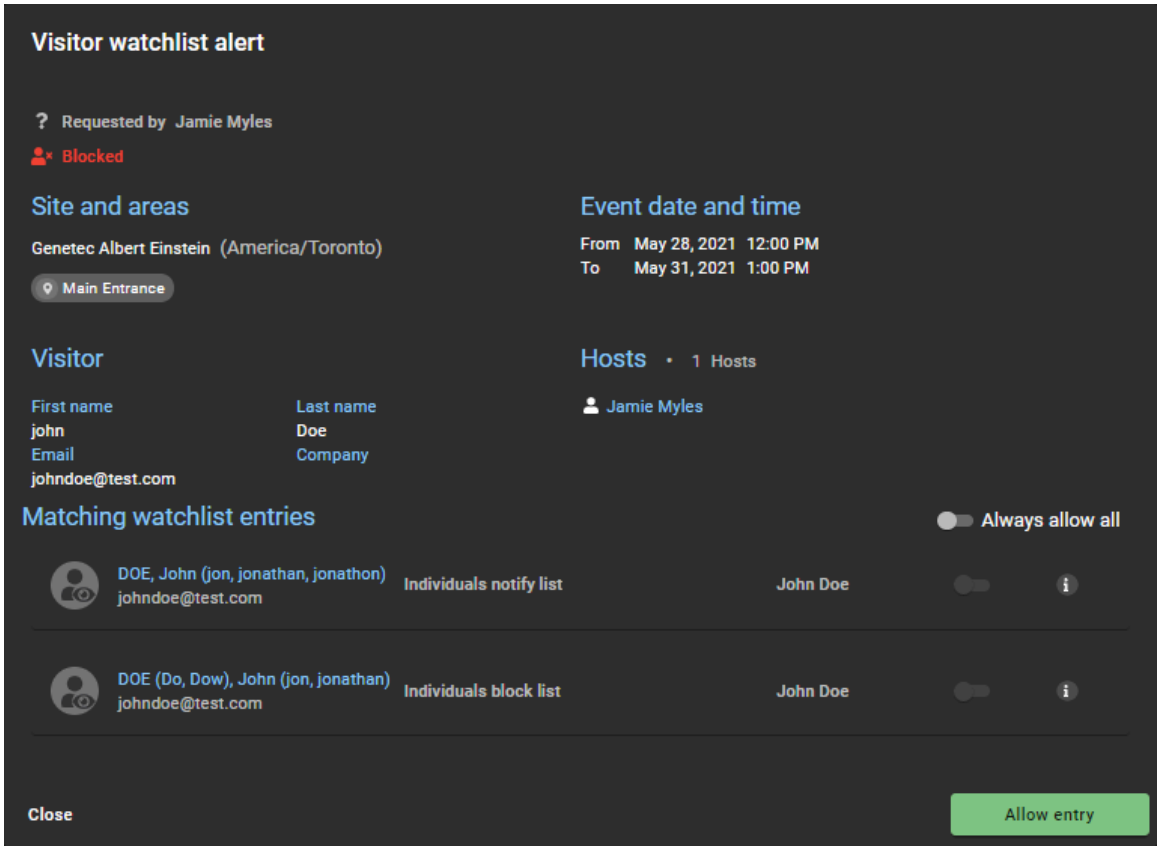
Use this procedure to add any similar emails or false positive email matches for visitors that you might want to allow once or always allow. For example, a possible match that happens to have the same name details, but is a different person with a different email address that should be allowed.

Procedure

1 In your *Visitor watchlist alert for <person or company of interest>* email, click **SEE BLOCK DETAILS**.



The visitor watchlist alert dialog opens in the Genetec ClearID™ web portal.



a) In the *Matching watchlist entries* section, hover over the info icon to see the watchlist entry details that matched this visitor.

b) (Optional) Click a matching watchlist entry in the list to open and view the watchlist entry details.

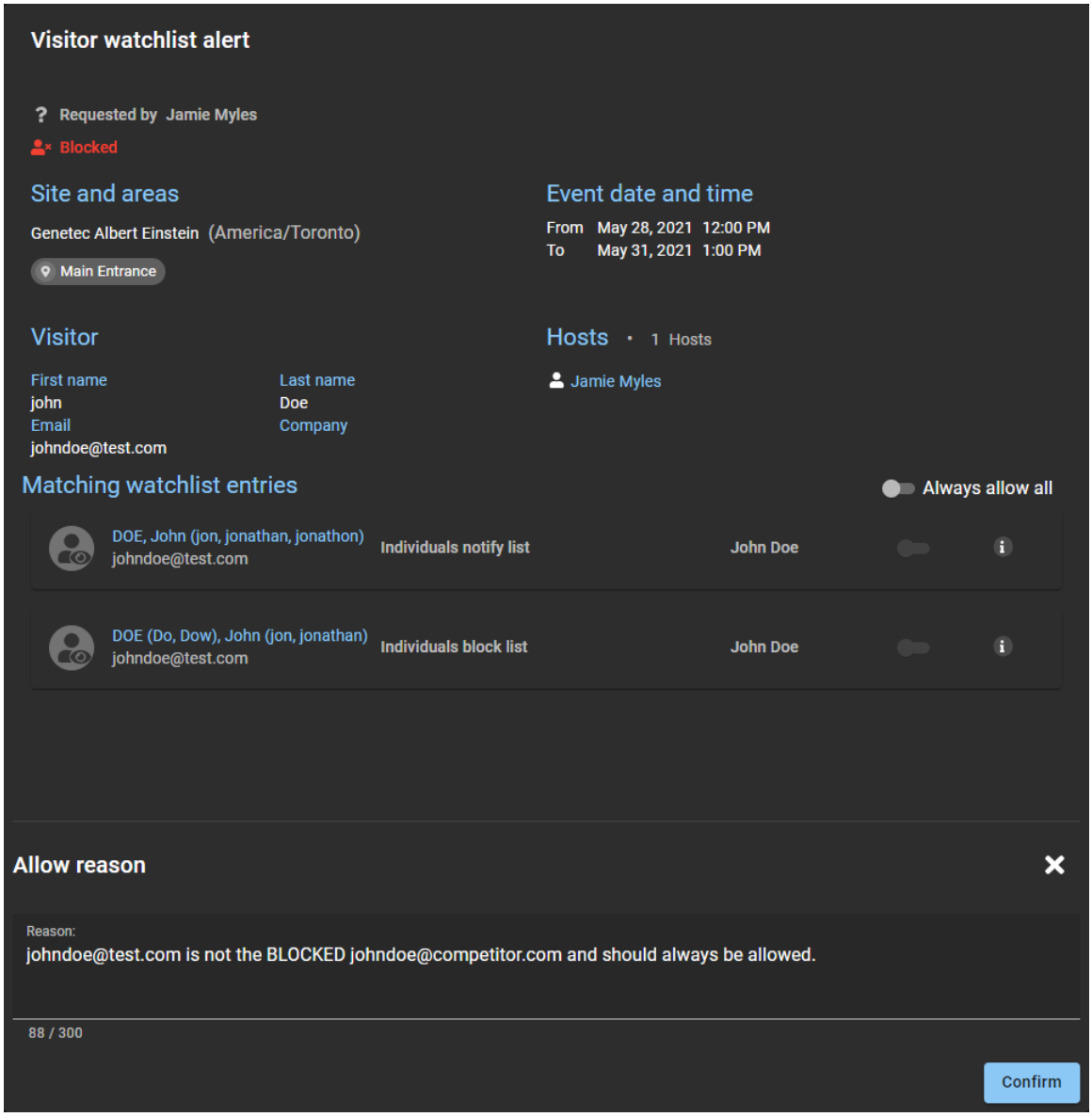
The watchlist entry opens in a new browser tab.

2 Choose whether you want to allow entry one time or always allow entry. Do one of the following:

- If you want to allow entry one time only for this visitor watchlist alert, click **Allow entry**.
- If you want to always allow specific future matching entries for this visitor, in the **Matching watchlist entries** list, move the **Always allow** slider to the enabled position for each entry you want to always allow, then click **Allow entry**.
- If you want to always allow all future matching watchlist entries for this visitor, in the **Matching watchlist entries** section, move the **Always allow all** slider to the enabled position, then click **Allow entry**.

  NOTE: Only the slider controls for the watchlist entries that can be set to **Always allow** will be moved to the enabled position.

3 In the **Reason** field, enter a reason why the blocked visitor was unblocked and allowed to visit.



4 (Optional) In the **Allow reason** section, click ✕ to cancel the unblock, then click **Close**.

5 Click **Confirm**.

Example

11

Role-based access control

Learn about role-based access control.

This section includes the following topics:

About role-based access control

Role-based access control uses identities with various attributes to automatically manage access control. Defining provisioning policies ensures that people in your organization always have up-to-date access permission levels. If an employee changes job title, department, or moves to a different site, the system automatically adjusts their access when their identity attributes are changed.

Example

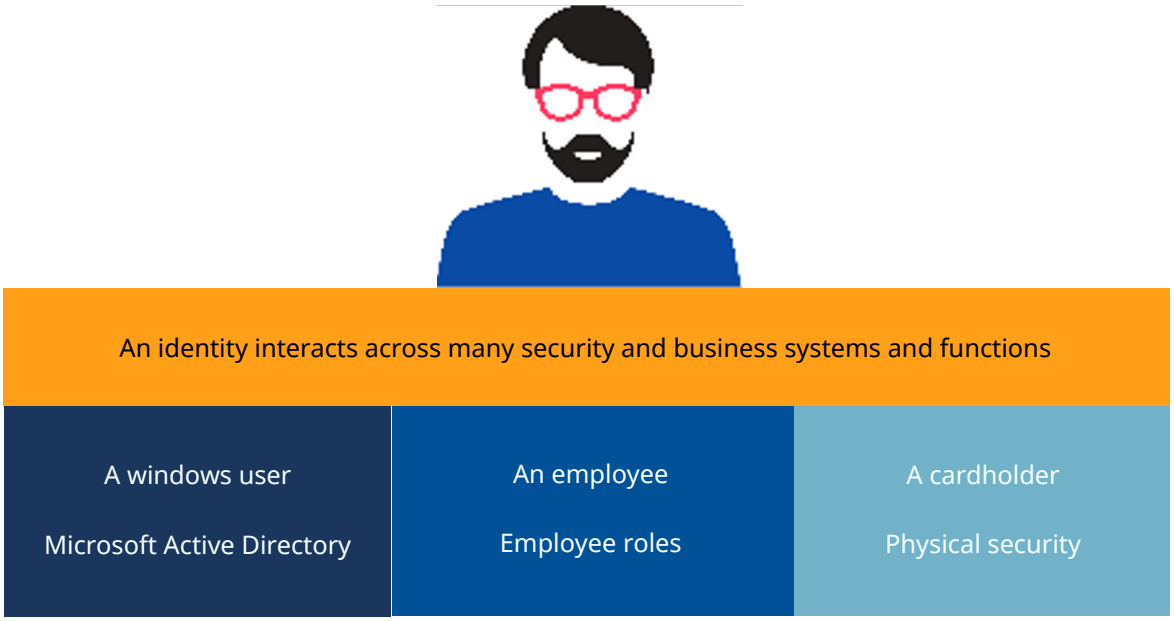
Role-based provisioning policies can be used to automatically assign or revoke access in different situations:

- Grant or revoke access based on employees locations.
- Grant or revoke access based on specific *roles* or job titles in the organization, or who they report to.
- Grant access to a zone only if people have specific training or certifications.
- Grant or revoke access based on a list of custom attributes synchronized from an external source.

NOTE: Many other scenarios might also be possible depending on your requirements and current setup. You can also manually add, modify, or remove access at any time.

What is an identity?

In Genetec ClearID™, an identity represents a person and defines what they can do across various platforms, security systems, business systems, and functions. Each identity has one or more access control badges (credentials) and is linked to a cardholder in Synergis™. For example, these credentials could be a Windows user (Active Directory), an employee (Human Resources and Payroll), a sales person (CRM and Quoting Tool), and a cardholder (Physical Security).



An identity is much more than the profile of a cardholder, it is a unique digital profile. The identity represents a person that either has an access control badge, uses the self-service portal, or both.

NOTE: In ClearID, a visitor or a temporary badge holder is not an identity.

- An identity is a person who has a permanent badge assigned to them.
- A visitor is a person who has a paper badge or a temporary badge credential assigned to them.
- A contractor can be either an identity or a visitor. When a contractor is defined as a visitor, they receive a one-day HID card entered as a visitor in ClearID.

Access is typically permanent for employees, semi-permanent for contractors, and temporary for guests.

Identity attributes

In Genetec ClearID™, attributes are the traits or characteristics that make up an identity. Examples of attributes include department, location, role, seniority, pay grade, training certifications, and security clearance.

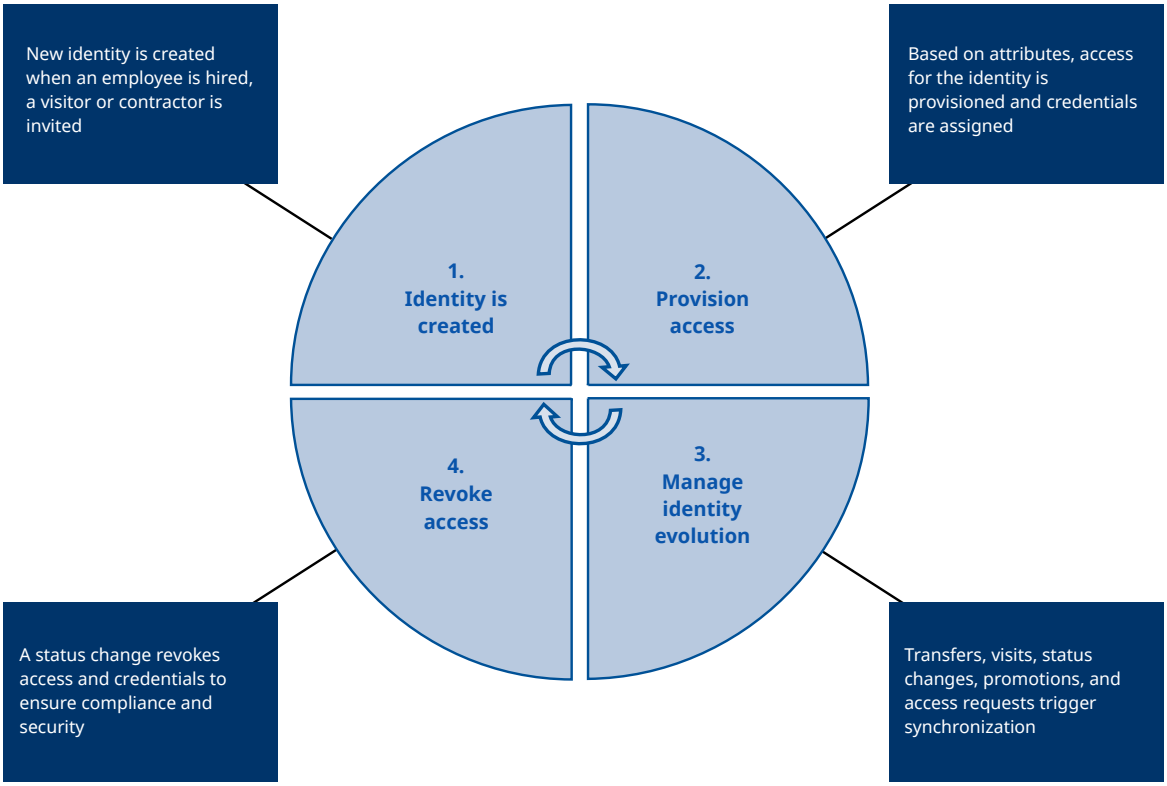
Role based access control relies on **policies** (*provisioning rules*) that automatically assign rights to **identities** (people) based on **attributes** (traits or characteristics).

In Genetec ClearID™, a role manager is an identity that has authority over who is assigned to a role. A role manager can add people to and remove people from a role. They are also responsible for role access review approvals.

The life cycle of an identity

In ClearID, the entire life cycle of an identity can be automatically managed.

The following diagram illustrates the life cycle of an identity when a provisioning policy is activated:



Adding roles

Before you can configure your role-based automatic access control policies, you must define your roles.

Before you begin

Familiarise yourself with role-based access control.

What you should know

In Genetec ClearID™, a role is a group of people who are assigned the same access. A person can be assigned multiple roles. Roles are linked to cardholder groups in Synergis™. A role manager controls who is granted access to the group.

- Only account administrators can add roles.
- Consider creating roles for each department, group, or job title in your organization. For example, you might create roles for HR, IT, marketing, developer teams, payroll, contractors, and so on.

Procedure

1 From the homepage, click **Organization** > **Roles**.

2 Click **Add role**.

3 In the *General* section, complete the fields.

a) Enter a name for the role.

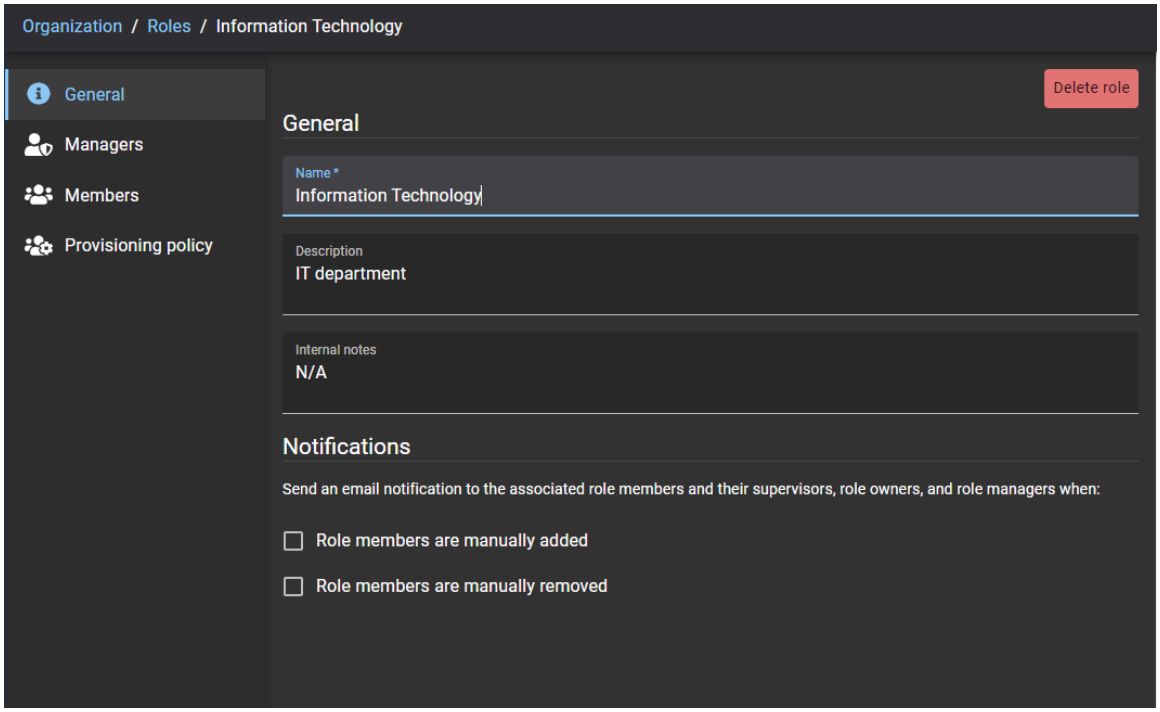
b) Enter a meaningful description.

c) Add any internal notes.

NOTE: The internal notes field is used to store special instructions or details only visible to the account administrator, role owner, and role manager. Other users of the system cannot view internal notes. For example, the internal notes field could contain the following:

Only permanent employees based in Montreal should be in this role. Discuss with security before adding employees to this role.

4 (Optional) In the *Notifications* section, Select the notifications options that you require.



5 Click **Save**.

Example

After you finish

Configure your role-based access control policies.

Related Topics

Viewing a role activity report on page 475

Configuring role managers

Role managers are composed of two distinct roles: role owners and role managers. Before you can define policies for a role or add or remove identities from a role, you must assign one or more employees as role managers.

Before you begin

Add your roles.

What you should know

- Only role owners can configure role managers.

Procedure

1 From the *Home* page, click **Organization** > **Roles** and select a Role.

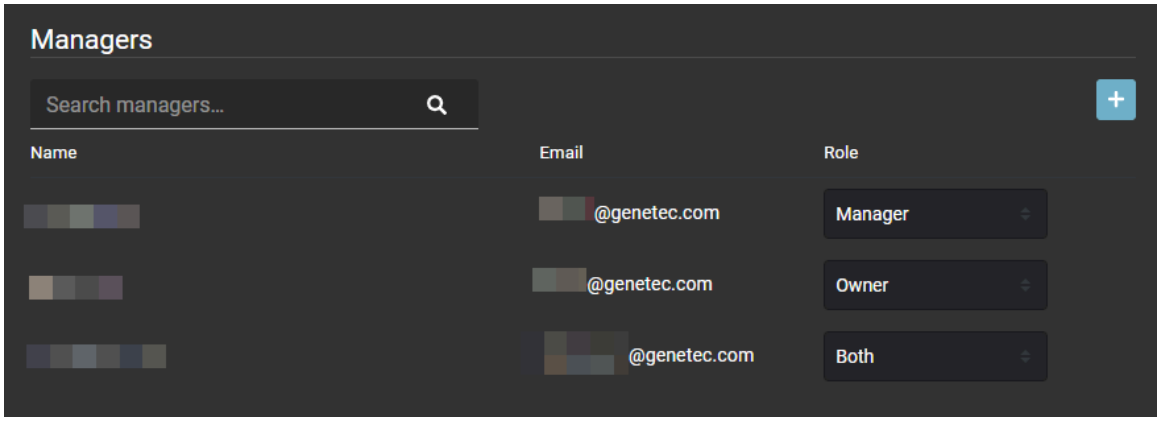
2 Click **Managers** to configure role manager settings.

a) Use the search field to find existing managers, or click **Add** ( ).

b) Select the required user or users and click **Confirm**.

3 Choose the **Role** type for the user or users you just added from the following:

- **Manager:** A role manager is an identity that has authority over who is assigned to a role. A role manager can add people to and remove people from a role.
- **Owner:** A role owner is responsible for assigning role managers and configuring role-based policies.
- **Both:** Use when one person is responsible for managing roles, assigning role managers, and configuring policies.



4 (Optional) To remove any managers that you no longer require, hover over a name and click .

5 Click **Save**.

The selected people are added to the list as either a manager, an owner, or both.

After you finish

Add role members.

Related Topics

Viewing a role activity report on page 475

Configuring role-based access control policies

To ensure that people in your organization always have up-to-date access permission levels, you can define provisioning policies that automatically assign people to specific roles based on their identity attributes. If an employee changes job title, department, or moves to a different site, the system automatically adjusts their access.

Before you begin

- Add your roles.

What you should know

- Only account administrators, or role owners can create or modify provisioning policies that automatically associate people with a specific role.
- A maximum of 25 policies with a maximum of 25 policy conditions can be defined for each role.

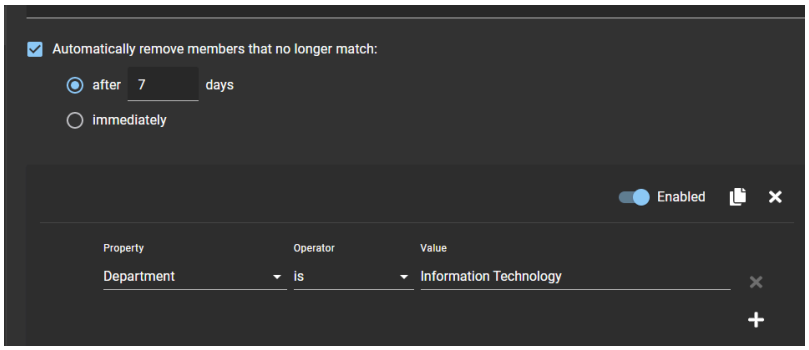
Procedure

1 From the *Home* page, click **Organization** > **Roles** and select a *Role*.

2 Click **Provisioning policy** and click or slide the toggle to **Active**.

3 In the *Description* field, enter a meaningful policy description.

4 (Optional) Configure your automatic removal settings for role members:



a) Select the **Automatically remove members that no longer match** checkbox option.

b) Specify when to automatically remove your role members. Choose one of the following:

- After a specified number of days. The default is 7 days.
- Immediately.

For example, an IT role with access to server rooms. When an IT role member moves to a Developer job, they might still require access to server rooms for 7 days for support or skill transfer purposes. Role members are removed when their identity settings no longer match the policy settings for role-based access control.

5 Add the policy rules for the role that you are configuring.

a) Select the **Property** type that you require.

The property types listed here are the default identity field attributes that can be found in the **General** details of any identity.

NOTE: Only roles that you are a role manager for can be selected.

- **Company:** Enter the company name.
- **Country:** Select a country from the list.
- **Department:** Enter a department name.
- **Description:** Enter a description.
- **Extended grant time:** Used to select True or False.
- **External ID:** Enter an external ID
- **Job title:** Enter a job title.
- **Primary site:** Enter or select the primary office location.
- **Provisioning attributes:** Type a custom provisioning attribute and press enter. Some examples might include: background check, drug and alcohol tests, NDA, Safety training, site induction training, and so on.
- **Status:** Choose either **Active** or **Inactive**.
- **Supervisor name:** Enter a name.
- **Supervisors:** Add multiple supervisors.
- **Worker type code:** Enter a worker type code
- **Worker type description:** Enter a meaningful description for the worker type.

b) Select an **Operator** from the following:

- Contains
- Does not contain
- Is
- Is not

NOTE: The **Operators** that are displayed vary depending on the **Property** type that you select.

a) Enter a value or select an option that relates to the **Property** type you selected.

NOTE: The **Value** options or fields that are displayed vary depending on the **Property** type that you select.

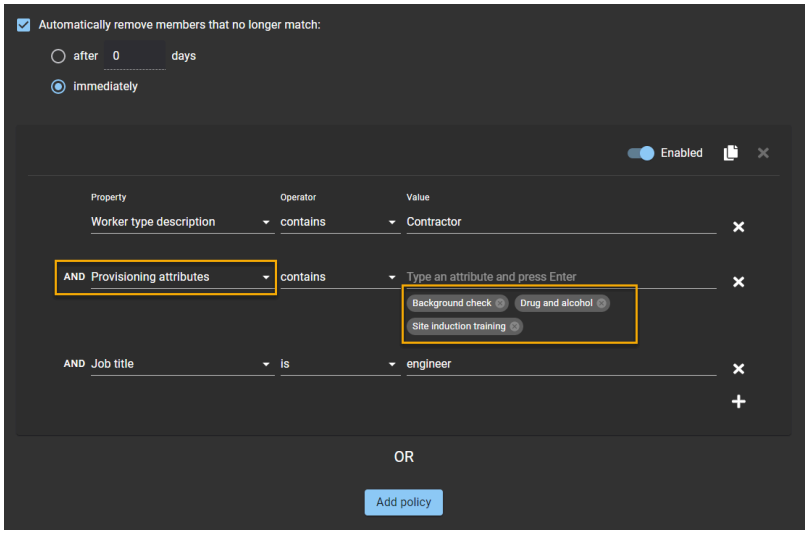
6 (Optional) Add custom provisioning attributes to your provisioning policy.

a) Select the **Provisioning attributes** property.

b) Select an **Operator** from the following:

- Contains
- Does not contain

c) Enter the custom attribute values that you require.



NOTE: For custom attributes, the provisioning policy is only triggered when an identity includes as a minimum all the provisioning attribute values specified in this policy.

7 (Optional) To temporarily disable a policy rule, set the **Enabled** slider to **Disabled**.

8 (Optional) Click **Copy policy** ( ) when you want to copy a rule or set of rules.

9 (Optional) Click to remove any policy rules that you no longer require.

10 Click **Save**.

Users can now be automatically assigned to or removed from specific roles based on their identity attributes.

Example

After you finish

Add role managers.

Related Topics

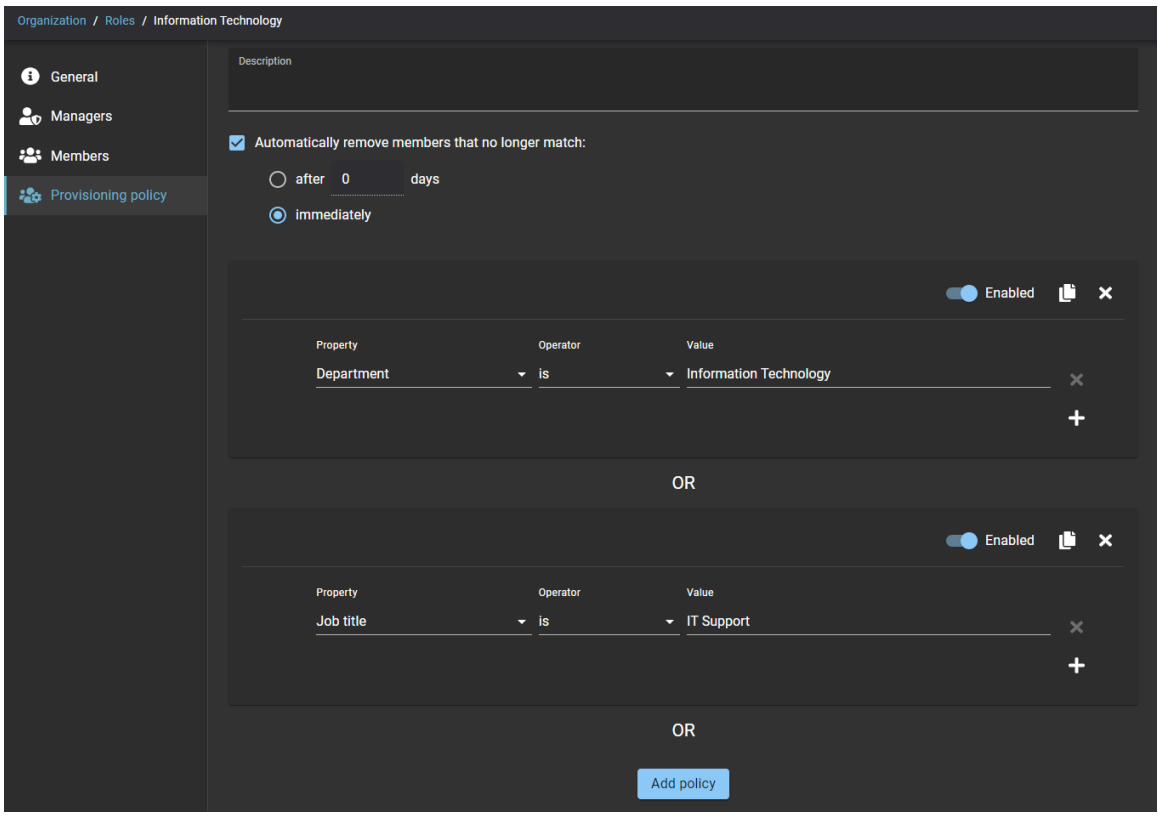
Adding roles on page 460
Identity fields on page 113

Scenario 1: Adding employees to an IT role

In this example, a policy is used to automatically assign employees to an IT role based on their identity attributes.

The following example shows a policy configured to automatically add employees to an Information Technology role if the following policy rule criteria are met:

- Department is Information Technology
- Job title is IT Support.

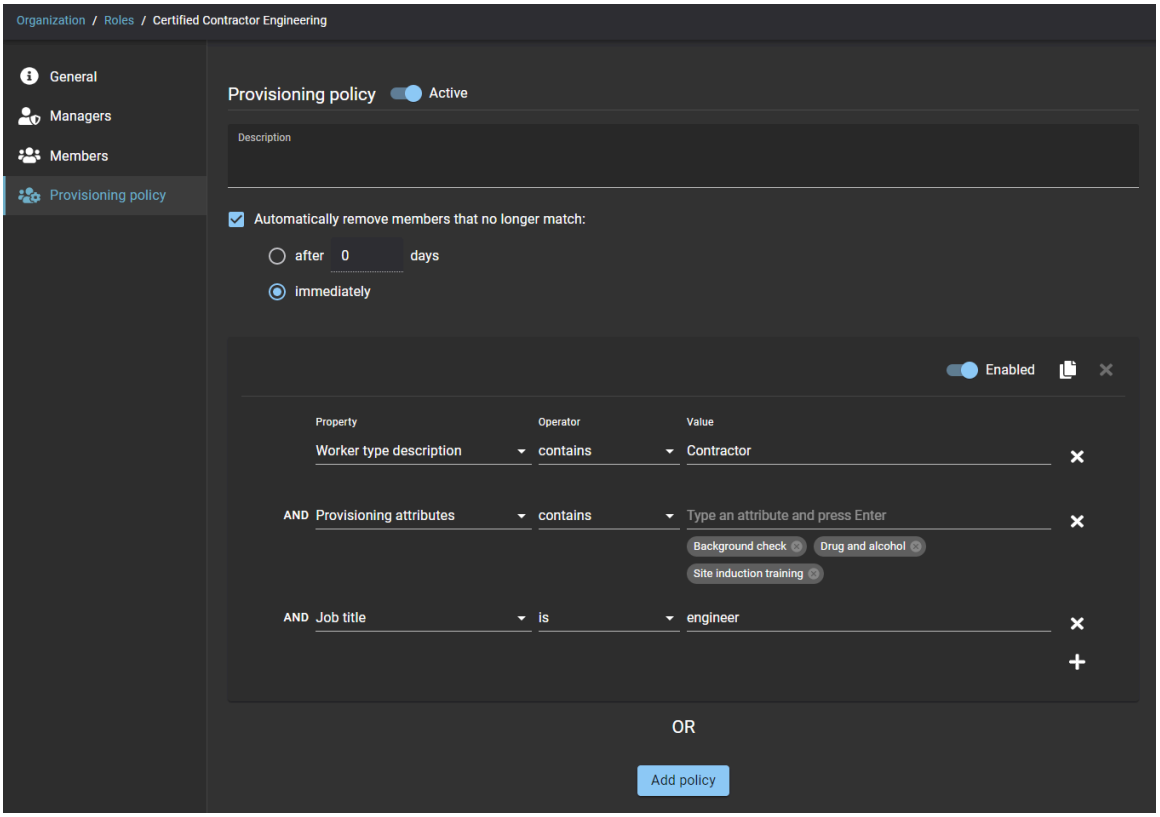


Scenario 2: Adding contractors to a certified contractor engineering role

In this example, a policy is used to automatically assign contractors to a certified contractor engineering role based on their identity attributes.

The following example shows a policy configured using custom attributes to automatically add contractors to a certified contractor engineering role if the following policy rule criteria are met:

- Identity contains worker type contractor
- Provisioning attributes are found
- Their job title is engineer.

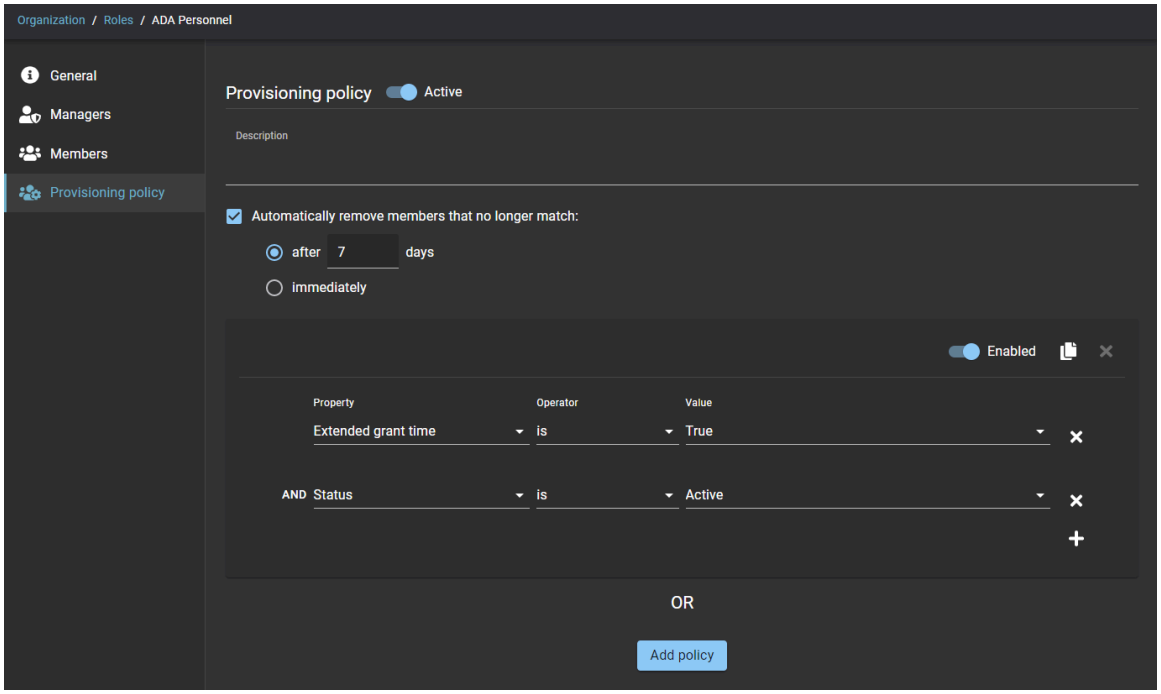


Scenario 3: Adding employees to an ADA personnel role

In this example, a policy is used to automatically assign employees that require accessibility assistance to an ADA personnel role based on their identity attributes.

The following example shows a policy configured to automatically add employees to an ADA personnel role if the following policy rule criteria are met:

- The extended grant time property is found.
- Their status is active.


Organization / Roles / ADA Personnel
General
Managers
Members
Provisioning policy
Provisioning policy
Active
Description
Automatically remove members that no longer match:
after 7 days
immediately
Enabled
Property
Operator
Value
Extended grant time
is
True
AND Status
is
Active
OR
Add policy

Adding custom provisioning attributes to an identity

When the default Genetec ClearID™ policy attributes do not meet your needs, you can manually assign custom provisioning attributes to an employees identity record. These attributes can then be used in a role-based access control policy.

Before you begin

- Add your roles.

What you should know

- Only account administrators can add custom attributes.
- Custom attributes are typically used when you import or synchronize your attributes from an external source.
- The current status of custom attributes can be managed using an integration, and any that become obsolete are removed automatically.
- Custom attributes can also be added or removed manually.

Some example custom provisioning attributes might include: background checks, drug and alcohol tests, NDA, safety training, site induction training, and so on.

Procedure

1 From the *Home* page, click **Organization** > **Identities** and select an identity.

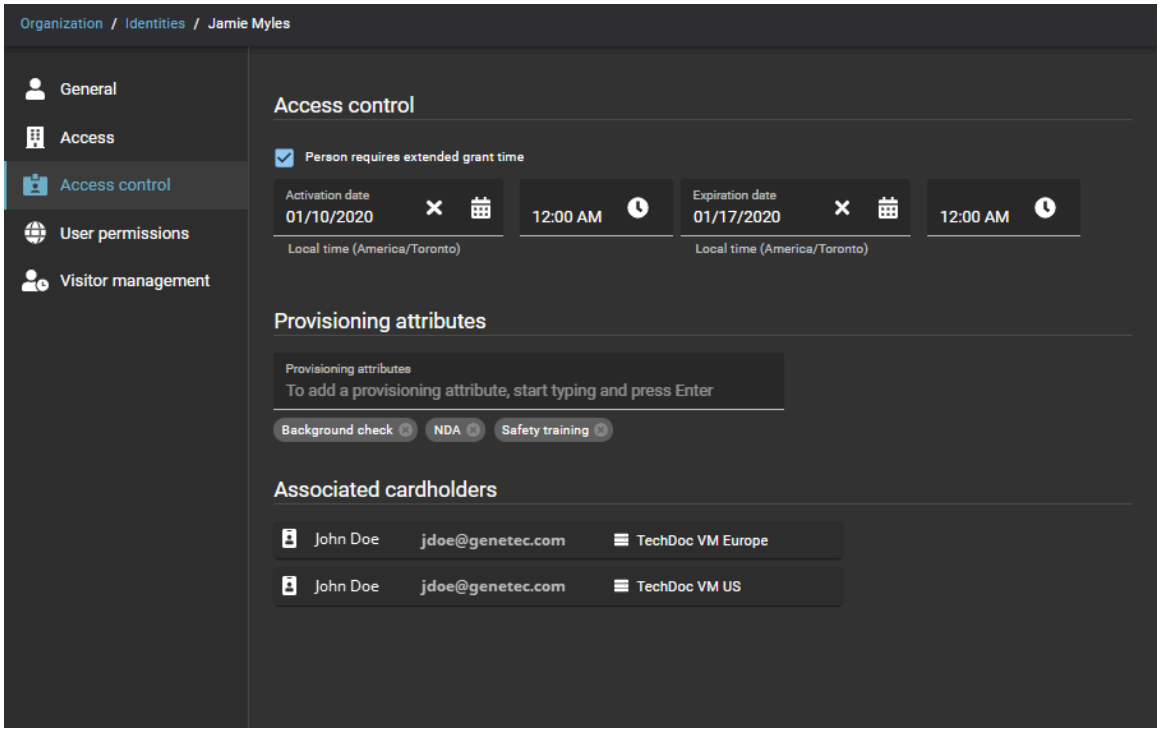
2 Click **Access control**.

3 In the *Provisioning attributes* section, start typing and press enter to add your custom attributes.

4 (Optional) Add additional custom attributes if required.

5 (Optional) Click  to remove any attributes that have expired or are no longer applicable.

6 Click **Save**.


Organization / Identities / Jamie Myles
General
Access
Access control
User permissions
Visitor management
Access control
Person requires extended grant time
Activation date
01/10/2020
12:00 AM
Local time (America/Toronto)
Expiration date
01/17/2020
12:00 AM
Local time (America/Toronto)
Provisioning attributes
Provisioning attributes
To add a provisioning attribute, start typing and press Enter
Background check
NDA
Safety training
Associated cardholders
John Doe
jdoe@genetec.com
TechDoc VM Europe
John Doe
jdoe@genetec.com
TechDoc VM US

Adding role members

To add role members who do not fit the default role-based provisioning policy criteria, you must add them manually.

Before you begin

Add role managers.

What you should know

- Only role managers can add role members.
- When a provisioning policy is enabled, role members are added automatically based on rules defined in the policy. Role members that are automatically added are shown in **Authorized by** column as Provisioning policy.
- Role members can also be added manually. Role members that are manually added are shown in the **Authorized by** column as Manual.
- Role members that match a provisioning policy are locked and cannot be removed.
- Role members that no longer match a provisioning policy are immediately unlocked. They are automatically removed after the period specified in a provisioning policy.

Procedure

1 From the *Home* page, click **Organization** > **Roles** and select a role.

2 Click **Members** to configure the list of role members.

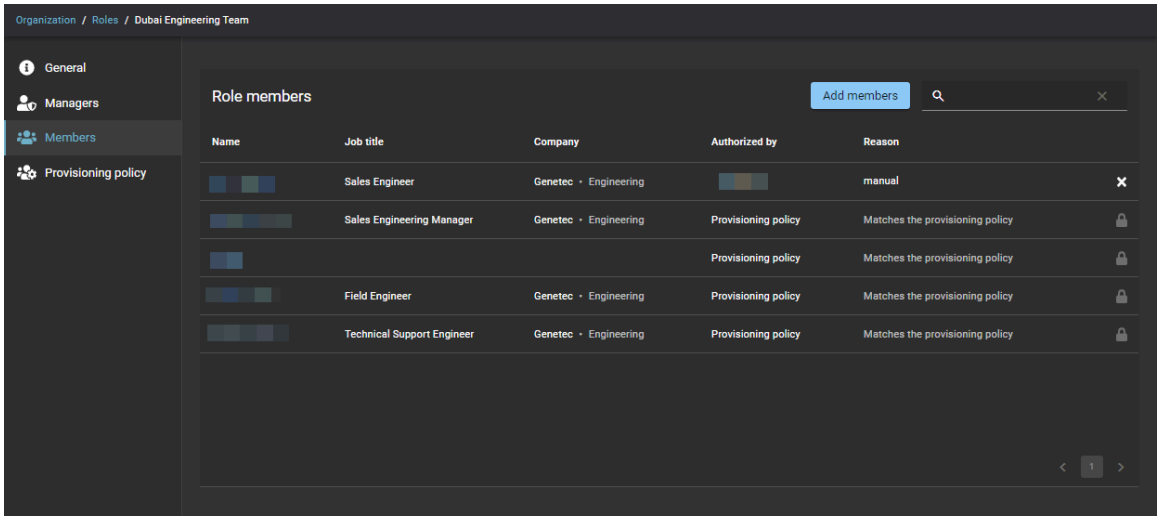
3 Click **Add members**.

4 Search for or select one or more members.

5 Enter a `reason` and click **Add**.

The following example shows the Dubai Engineering Team role members.

NOTE: The **Authorized by** column shows four members that were added automatically (Provisioning policy) and one that was added manually (Manual).



TIP: You can click the blue text in the **Name** column to view or modify the identity details.

6 (Optional) To immediately remove any role members who no longer meet the policy criteria, or role members that were added manually, click ✕ then click **Remove**.

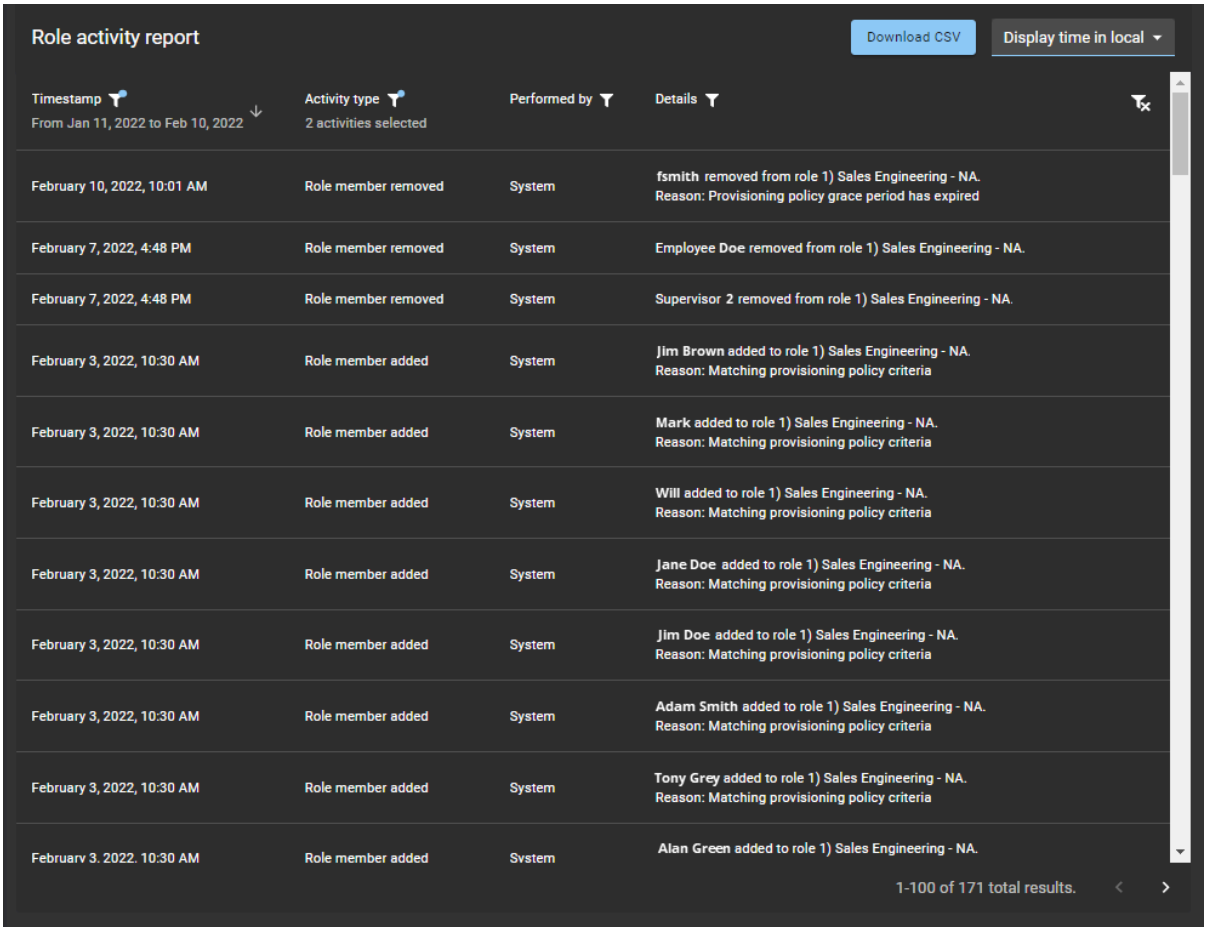
Related Topics

Viewing a role activity report on page 475

About role activity report

In Genetec ClearID™, a role activity report is an audit trail of all activities related to roles. The report includes timestamp information, activity type, who activity was performed by, and a details section including reason information.

Role activity report



The role activity report is used by account administrators to review all activities related to roles. When the report is used by role managers or role owners, only the activity for their roles is shown. For example, role access granted or removed, role manager added or removed, role owner added or removed, and role member added or removed.

Filters can be used to help refine the report search results by timestamp, activity type, performed by, and details.

Related Topics

Viewing a role activity report on page 475

Viewing a role activity report

As an *Account administrator*, *Role manager*, or *Role owner*, you can view an audit trail of role-related activities such as timestamp information, activity type, who performed the activity, and more.

Before you begin

You must be an *Account administrator*, *Role manager*, or *Role owner* to view a **Role activity report** and review audit trail information for role-related activities.

Procedure

1 From the *Home* page, click **Organization** > **Roles**.

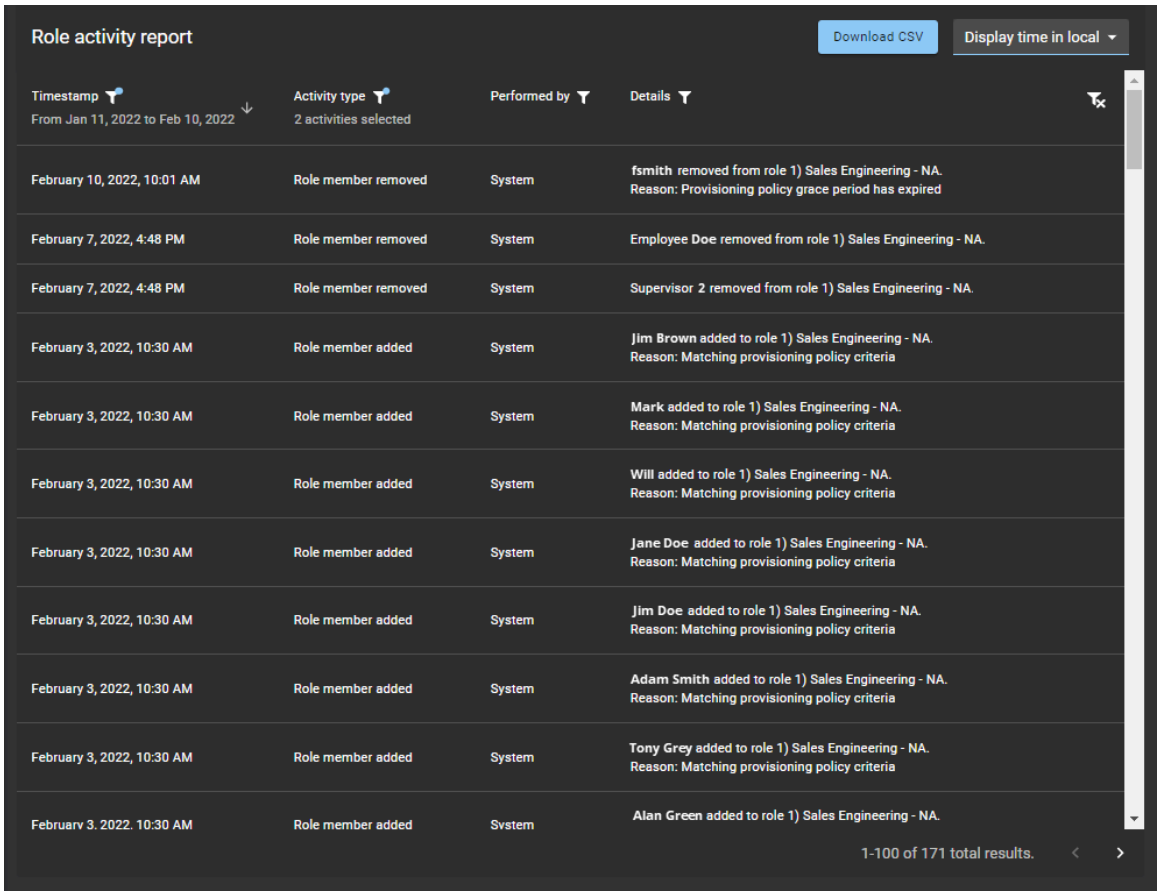
2 Search for or select the role that you require from the **Name** column.

3 Click **Role activity**.

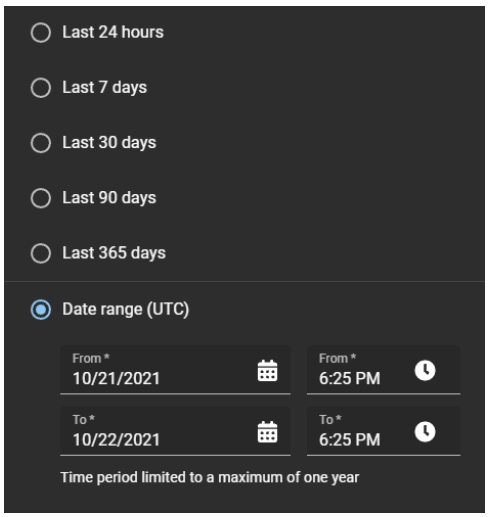
4 From the **Display time** menu, select the required display time format.

- **Display time in local:** Report times are displayed using the system time from the computer of the logged-in user.
- **Display time in UTC:** Report times are displayed using Coordinated Universal Time (UTC).

5 Filter the report based on your required criteria:

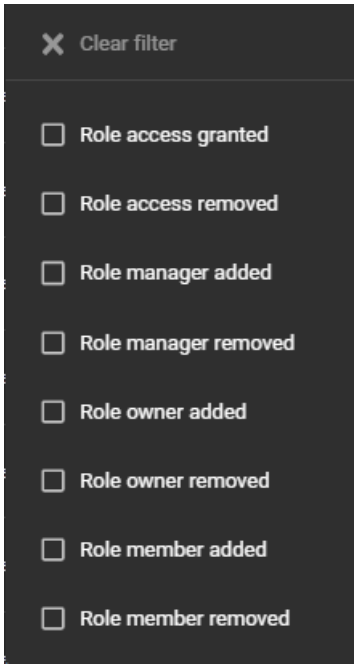


- **Timestamp:** In the **Timestamp** column, click to filter the results by date. Select a pre-defined date range from the choices available or enter a specific date range using the date range picker.

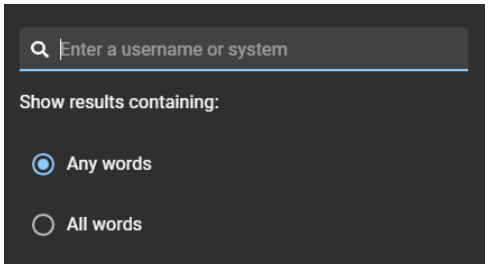


(Optional) Use the sort icons (and) to display the results in descending or ascending order.

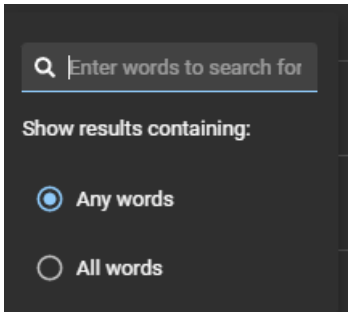
- **Activity type:** (Optional) Use the sort icons (and) to display the results in descending or ascending order.



- **Performed by:** In the **Performed by** column, click to open a search dialog and filter the results by who performed an activity. For example, tasks performed by a particular user, or tasks performed automatically by the system.



- **Details:** In the **Details** column, click to open a search dialog to search the details or reason using a search criteria.



- **(Optional):** Click to reset filter selections.

6 Click **Download CSV**, to download a copy of the role activity report in CSV format. The report can then be used for auditing purposes, to keep a physical copy, to attach to an audit request, to review offline, or to manipulate or consolidate data in a spreadsheet for other audiences.

a) Follow your browser prompts to complete downloading the exported file.

The file is exported as a *.CSV* file to the default download location for your browser. By default the exported file is created using the name of your site. For example, RoleActivity_*rolename*_*fromdate*_to_*todate*_SiteActivityReport.csv (*RoleActivity_All active contracotrs_2024-09-23.csv*).

NOTE: The columns and entries in the CSV file can vary depending on the filters you've selected when you download the report.

Related Topics

About role activity report on page 474
Adding role members on page 472
Configuring role managers on page 462
Adding roles on page 460

12

Connecting to other systems

Learn how to connect ClearID to other systems.

This section includes the following topics:

Authenticating your connection

Before you can connect with Genetec ClearID™ to synchronize data or issue API commands, you must first authenticate your applications (or API environment) so that your applications or API can communicate with ClearID.

What you should know

Use the API integration key to authenticate your applications when making requests to your ClearID account.

- The OAUTH 2.0 protocol is used to authenticate non-user system communications or connections with ClearID.
- Store your key securely and don't share it.

IMPORTANT: When you regenerate your key, you must update any applications that access this account to use the new key.

You can create an API integration to authenticate communications for the following:

- Genetec ClearID™ API
- System for Cross-domain Identity Management (SCIM) integration
- Genetec ClearID™ One Identity Synchronization Tool (Azure AD, Database, File)
- Genetec ClearID™ LDAP Synchronization Agent

Procedure

1 Add an API integration.
   a) In ClearID, click **Administration** > **API integrations**.
   b) Click **Add API integration**.
      - **Name:** Enter a name for the API integration. For example, Active Directory LDAP Synchronization, API user connection, or One Identity Synchronization.
      - **Description:** Enter a meaningful description for the API integration.
   c) Click **Save**.

2 Select a user from the API integration list.
   a) Click **Generate key** and then click **Confirm**, to generate the authentication key for your API integration.
      CAUTION: The current API integration key immediately becomes invalid and isn't recoverable.
   b) Click **Download authentication key**.
      TIP: Make a note of the downloaded file location for later use.
      By default, the authentication key for your API integration is named *key-systemID-APIintegrationname.json*.

You're now ready to configure your applications to synchronize data or issue API commands.

Example

After you finish

Depending on how attributes are set up in your organization, do one of the following:

- Synchronize identity attributes using REST API commands.
- Synchronize identity attributes using the SCIM integration.
- Synchronize identity attributes using One Identity (Azure AD, Database, File).
- Synchronize identity attributes using LDAP.

Related Topics

About ClearID information security on page 9
Logging on to ClearID on page 33

Setting up data synchronization

Setting up data synchronization in Genetec ClearID™ involves learning some concepts, configuring the synchronization solution for your identity data, and the webhook integration options that are relevant for your organization.

1. Review the firewall port requirements.
2. Sign in to ClearID.
3. Grant access to the web portal.
4. Authenticate your non-user system connections to synchronize data or issue API commands.
5. Choose a synchronization solution for your identity data:
   - Synchronize identity attributes using the ClearID API:
     - Synchronize identities using an API.
       - Learn about the ClearID API.
   - Synchronize identity attributes using the ClearID SCIM integration:
     - Synchronize identities using the SCIM Integration.
       - Learn about the SCIM standard.
       - Learn about Microsoft Entra ID attribute fields.
       - Configure the ClearID SCIM integration.
         - Generate a SCIM key.
         - Create a Microsoft Azure enterprise application.
         - Connect your ClearID SCIM integration to Microsoft Azure.
         - Disable your Microsoft Entra ID groups setting.
         - Configure your Microsoft Entra ID user settings.
         - Configure your ClearID SCIM integration synchronization settings.
       - (Optional) Reset your ClearID SCIM integration identity data.
       - Review the ClearID SCIM integration synchronization status.
   - Synchronize identity attributes using the ClearID One Identity Synchronization Tool:
     - Synchronize identities using the One Identity Synchronization Tool.
       - Learn about the One Identity Synchronization Tool.
       - Learn about the One Identity Synchronization Tool Attribute fields.
       - Learn about the Azure web app.
       - Install the One Identity Synchronization Tool.
       - Configure the One Identity Synchronization Tool.
     - Review your synchronization status.
     - Learn about One Identity Synchronization Tool logs.
     - View the One Identity Synchronization Tool logs.
     - Update existing identities from an external data source.
   - Synchronize identity attributes using the ClearID LDAP Synchronization Agent:
     - Learn about the ClearID LDAP Synchronization agent.
     - Learn about LDAP attributes to ClearID attribute mapping.
     - Configure the ClearID LDAP Synchronization Agent.

6. Configure and manage your webhook integrations:
   - Learn about webhooks.
     - Create your webhooks.
     - Modify your webhooks.
     - View the webhook logs.
7. (Optional) Troubleshooting information.
   a. One Identity Synchronization Tool: Connectivity issues
   b. One Identity Synchronization Tool: Data Synchronization issues

Synchronizing identities using an API

Use the Genetec ClearID™ API to code your own solutions to automate various functions in ClearID. The primary use for the REST API is synchronizing identities, however many other scenarios are also possible.

About the ClearID API

The Genetec ClearID™ API is an Application Programming Interface that developers can use to help customers and partners integrate additional software or perform custom functions.

Genetec ClearID™ is an API first service and the Web interface is built on top of that REST API. As a result most of the functionality from the Web interface is accessible by using Representational State Transfer (REST) endpoints.

The ClearID API is developed with two main objectives:

- **Platform independence:** Any client should be able to call the API, regardless of how the API is implemented internally. This platform independence requires using standard protocols, and having a mechanism where the client and the web service can agree on the format of the data to exchange.
- **Service evolution:** The web API should be able to evolve and add functionality independently from client applications. As the API evolves, existing client applications should continue to function without modification.

The ClearID API follows the best practices for Representational State Transfer (REST) and uses the standard HTTP actions: `GET`, `POST`, `PUT`, `PATCH`, and `DELETE`.

Examples

The primary use for the REST API is synchronizing identities, however many other scenarios are also possible.

Here are some examples of the reports or data that you can obtain from ClearID using the REST API:

- List of all upcoming and past visit events.
- List of all approved visitor hosts.
- List of all upcoming and past visit events for a specific requester, host, or site.
- List of all active or inactive hosts, permissions information for each host, contact details, title, department, and company.

For each visit you can also obtain the following:

- Event
- Event name
- Expected arrival and departure date and time
- Visit requester
- List of guests
- Visit type
- Parking location
- Meetup location
- Site visited
- Areas on that site
- Approval details

For more information about automating functions using the ClearID REST API, see the Genetec™ Developer documentation.

Synchronizing identities using the SCIM integration

To synchronize external system attributes from a supported identity provider into Genetec ClearID™ identity attributes, you can use the System for Cross-domain Identity Management (SCIM) integration. These identity attributes can then be used in ClearID to assign people to roles and automate role-based access control.

What you should know

Only Microsoft Entra ID is currently supported. If you want to integrate another supported identity provider, contact your deployment representative.

Procedure

1 Learn about the SCIM standard.

2 Learn about Microsoft Entra ID attribute fields.

3 Configure the SCIM integration.

4 (Optional) Reset the SCIM integration identity data.

5 Review SCIM integration synchronization status.

About the SCIM standard

The System for Cross-domain Identity Management (SCIM) standard is an open-standard protocol for exchanging identity information between entities. It's widely used to automate the process of managing user identities in IT systems. The SCIM integration ensures that any changes are automatically synchronized to other systems when identity attributes change.

- **System:** SCIM creates a common format for how identity data is exchanged.
- **Cross-domain:** SCIM securely communicates identity data across platforms.
- **Identity management:** SCIM automates the flow of information between an identity provider or identity and access management (IAM) system and cloud-based applications.

Benefits

- Using SCIM reduces the effort that it takes to create, modify, and synchronize identity data.
- Because the SCIM integration uses Microsoft Entra ID in the cloud, there's no machine or infrastructure to manage.
- There are no firewall ports to configure.

NOTE: The SCIM integration only synchronizes the identity attributes that have changed. This approach results in a significant reduction in throughput and processing overheads. Other solutions typically synchronize all identity attributes at a specified time to get all the latest identity data.

About Microsoft Entra ID attribute fields

When you synchronize an external system with Genetec ClearID™ using the System for Cross-domain Identity Management (SCIM) standard, your external system attributes are imported into ClearID identity attributes. The import uses the field mappings in Microsoft Entra ID.

Most of the ClearID identity fields are created as custom attributes.

You must prefix each field with: urn:ietf:params:scim:schemas:extension:clearid:2.0:User

Identity attributes

Attribute fields	Notes
Basic fields: active username displayname	• These basic fields are the only fields that we use from the SCIM base schema. • displayName is required in the mapping.
Base identity fields: urn:ietf:params:scim:schemas:extension:clearid:2.0:User:description urn:ietf:params:scim:schemas:extension:clearid:2.0:User:firstName urn:ietf:params:scim:schemas:extension:clearid:2.0:User:lastName urn:ietf:params:scim:schemas:extension:clearid:2.0:User:middleName urn:ietf:params:scim:schemas:extension:clearid:2.0:User:countryCode urn:ietf:params:scim:schemas:extension:clearid:2.0:User:email	• firstName or lastName must be supplied in the mapping (the same as in the portal identity form). • email must be a valid email format to be created in the identity properly. • countryCode must be a 3-letter code. It's best to use a constant value from Microsoft Entra ID for now.
CompanyData fields: urn:ietf:params:scim:schemas:extension:clearid:2.0:User:employeeNumber urn:ietf:params:scim:schemas:extension:clearid:2.0:User:secondaryEmail urn:ietf:params:scim:schemas:extension:clearid:2.0:User:cityOfResidence urn:ietf:params:scim:schemas:extension:clearid:2.0:User:stateOfResidence urn:ietf:params:scim:schemas:extension:clearid:2.0:User:zipCode urn:ietf:params:scim:schemas:extension:clearid:2.0:User:phoneNumberPrimary urn:ietf:params:scim:schemas:extension:clearid:2.0:User:phoneNumberSecondary	• secondaryEmail must be a valid email format to be created in the identity properly.
PrivateData fields: urn:ietf:params:scim:schemas:extension:clearid:2.0:User:supervisorName urn:ietf:params:scim:schemas:extension:clearid:2.0:User:departmentName urn:ietf:params:scim:schemas:extension:clearid:2.0:User:jobTitle urn:ietf:params:scim:schemas:extension:clearid:2.0:User:companyName urn:ietf:params:scim:schemas:extension:clearid:2.0:User:workerTypeDescription urn:ietf:params:scim:schemas:extension:clearid:2.0:User:workerTypeCode	
SystemData fields: urn:ietf:params:scim:schemas:extension:clearid:2.0:User:hasExtendedTime urn:ietf:params:scim:schemas:extension:clearid:2.0:User:externalId	• Boolean fields only work with the SCIM 2.0 feature flag. • externalId is required and needs to be unique. This value is used to manage the creation of identities (same way in OneIdentity). The easiest way to use this value is to map with an email or username.
Other custom fields: (that aren't directly part of the identity model) urn:ietf:params:scim:schemas:extension:clearid:2.0:User:hasWebPortalAccess	• Boolean fields only work with the SCIM 2.0 feature flag.

Attribute fields	Notes
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:isAdmin	

Attribute fields that are not supported

Date fields:

- birthday
- activationDateUtc
- expirationDateUtc
- externalSyncTimeUtc

Fields with ids (reference to identityIds):

- creationOnBehalf
- approvers
- siteId
- provisioningAttributes
- customFields

Configuring the SCIM integration

Before you can synchronize an external system with Genetec ClearID™, you must first configure the System for Cross-domain Identity Management (SCIM) integration in ClearID and Microsoft Azure.

Before you begin

- Learn about the SCIM standard.
- Learn about Microsoft Entra ID attribute fields.

What you should know

This procedure is for the ClearID deployment team, your IT department, or the people responsible for administering Microsoft Entra ID in your organization.

Only Microsoft Entra ID is currently supported. If you want to integrate another supported identity provider, contact your deployment representative.

IMPORTANT: Do not skip the disable groups step. ClearID does not support the synchronization of groups.

Procedure

1 Generate your SCIM key.

2 Create your Microsoft Azure enterprise application.

3 Connect your ClearID SCIM integration to Microsoft Azure.

4 Configure your attribute mappings.

a) Disable the Microsoft Entra ID groups setting.

b) Configure the Microsoft Entra ID user settings.

5 Configure the ClearID SCIM integration synchronization settings.

After you finish

Review the SCIM integration synchronization status.

Generating a SCIM key

For your Genetec ClearID™ SCIM integration to communicate with Microsoft Entra ID, you must generate a System for Cross-domain Identity Management (SCIM) key.

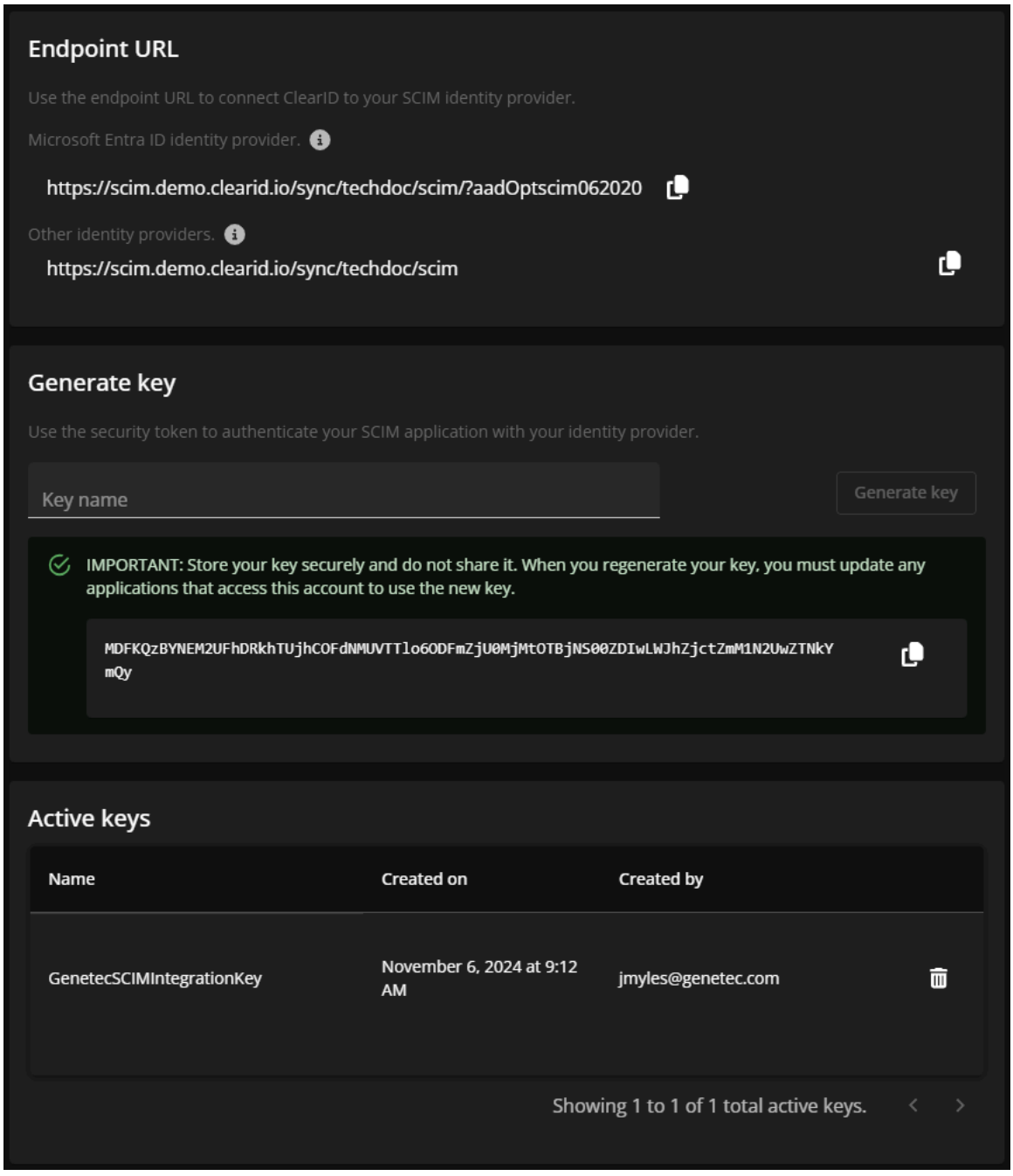
What you should know

Only a ClearID portal *administrator* can perform this task.

Procedure

1 In the ClearID portal, click **Administration** > **SCIM Integration**.

2 In the *Generate key* section, enter a key name and click **Generate Key**.
For example, the key name could be `GenetecSCIMIntegrationKey`.



After you finish

Create your Microsoft Azure enterprise application.

Creating a Microsoft Azure enterprise application

Your organization can automate identity attribute provisioning using the Genetec ClearID™ SCIM integration with Microsoft Entra ID as the identity provider. To use the integration, you must first create an enterprise application in Microsoft Azure.

What you should know

This procedure is for the ClearID deployment team, your IT department, or the people responsible for administering Microsoft Entra ID in your organization.

Procedure

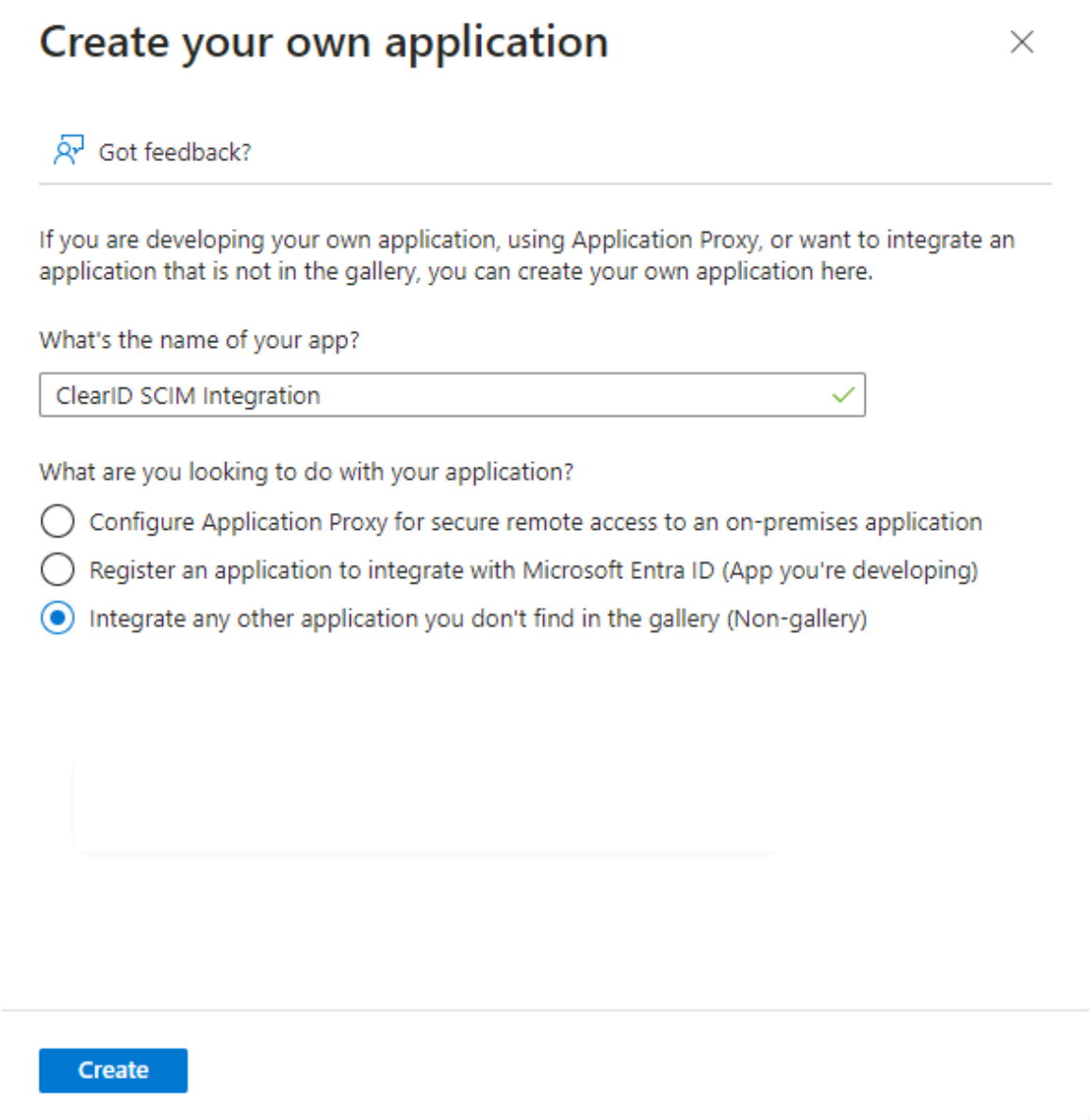
1 In the Microsoft Azure portal, search for and click **Enterprise applications**.

2 In the *Enterprise applications* section, click **New application**.

3 Click **Create your own application**.

4 Select **Integrate any other application you don't find in the gallery (Non-gallery)**.

5 Enter your application name and click **Create**.
For example, the application name could be `ClearID SCIM Integration`.



NOTE: Watch for a successfully added notification in the upper right of the screen.

After you finish

Connect your ClearID SCIM integration to Microsoft Azure.

Connecting your ClearID SCIM integration to Microsoft Entra ID

Before you can use the SCIM integration in Genetec ClearID™ to synchronize identity attributes, you must provide your credentials that connect the ClearID SCIM Integration API to Microsoft Entra ID.

Before you begin

Create your Microsoft Azure enterprise application.

What you should know

This procedure is for the ClearID deployment team, your IT department, or the people responsible for administering Microsoft Entra ID in your organization.

Procedure

1 In the Microsoft Entra ID portal, find and click **Enterprise applications**.

2 In the *Enterprise applications* section, search for and select your **ClearID SCIM integration** application.

3 In the *Manage* section, click **Provisioning** and then click **Provisioning** again.

4 From the **Provisioning Mode** list, select **Automatic**.

5 Expand the *Admin Credentials* section.

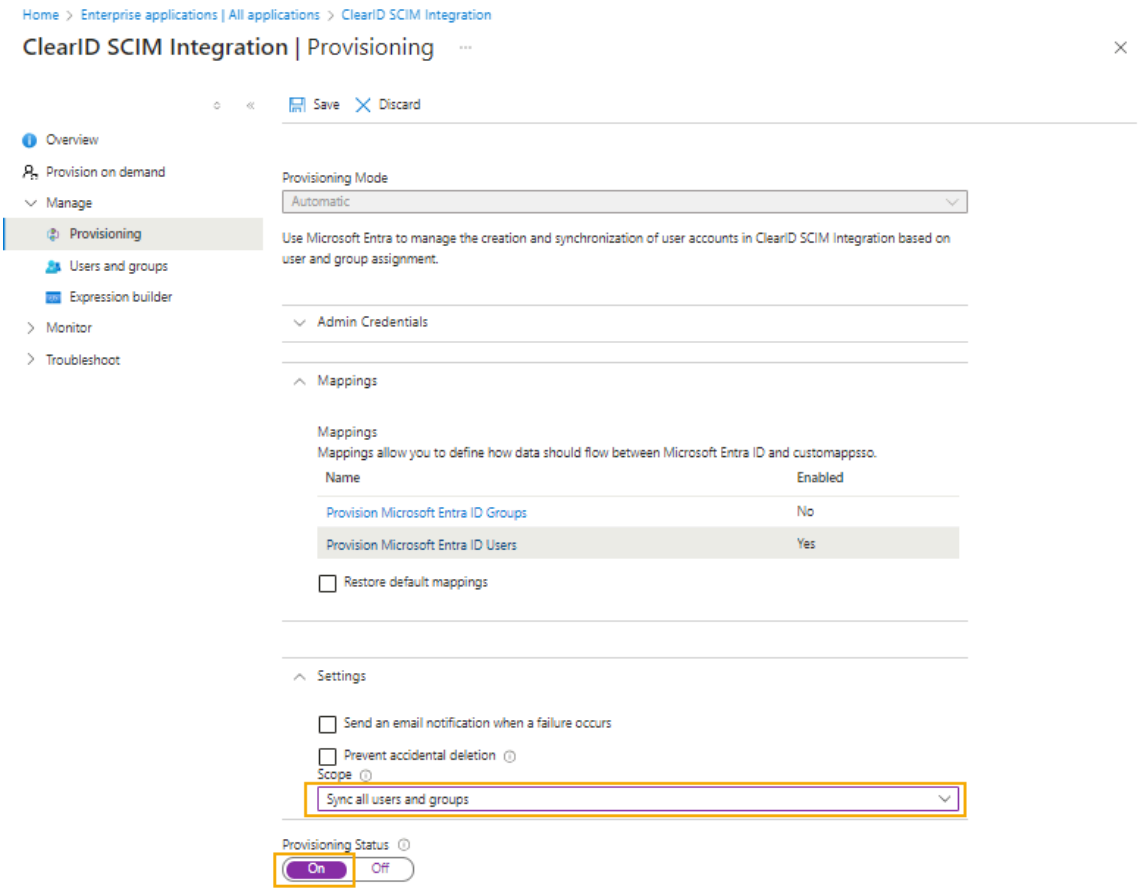
6 In the ClearID portal **SCIM integration** tab, locate the *Endpoint URL* section and click **Copy to clipboard** next to the Microsoft Entra ID identity provider.
The endpoint URL is copied to your clipboard.

7 Return to the Microsoft Entra ID *Provisioning* page and paste into the **Tenant URL**.
The endpoint URL is used to connect ClearID to SCIM authentication systems and Microsoft Entra ID.

8 In the ClearID portal **SCIM integration** tab, locate the *Generate key* section and click **Copy to clipboard**.

9 Return to the Microsoft Entra ID *Provisioning* page and paste into the **Secret Token** field.
The SCIM key is used to authenticate your application with Entra ID.

10 Click **Test Connection**.



11 Click **Save**.

TIP: Watch for a successful update notification in the upper right of the screen.

After you finish

Disable your Microsoft Entra ID group settings.

Disabling Microsoft Entra ID groups setting

Genetec ClearID™ doesn't support the synchronization of groups. To prevent group settings or attributes from being synchronized, disable the Microsoft Entra ID Groups setting in your Microsoft Azure enterprise application.

Before you begin

Connect your ClearID SCIM integration to Microsoft Azure.

What you should know

This procedure is for the ClearID deployment team, your IT department, or the people responsible for administering Microsoft Entra ID in your organization.

IMPORTANT: ClearID doesn't support group synchronization. This setting must be disabled.

Procedure

1 In the Microsoft Azure portal, search for and click **Enterprise applications**.

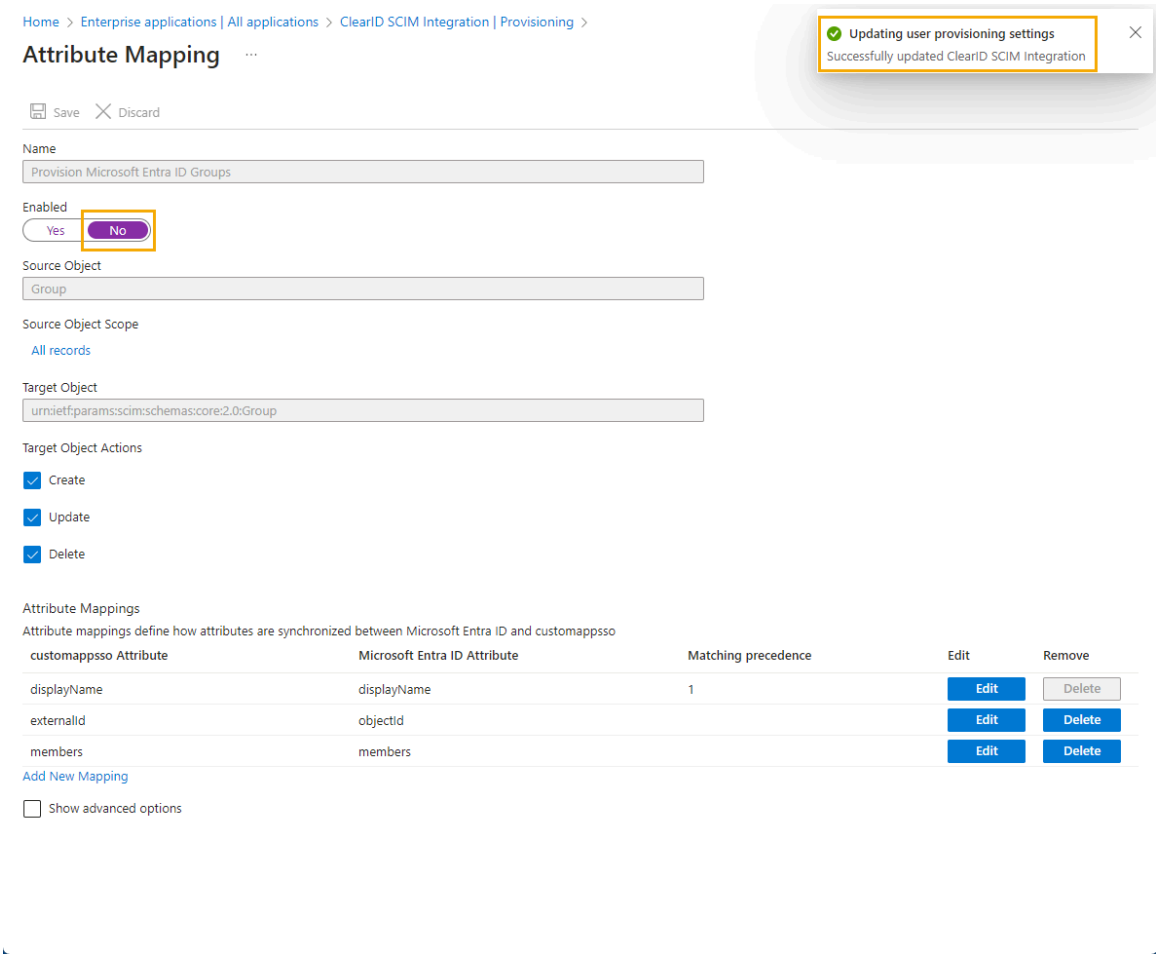
2 In the *Enterprise applications* section, search for and select your **ClearID SCIM integration** application.

3 In the *Manage* section, click **Provisioning** and then click **Provisioning** again.

4 Expand the *Mappings* section of the *Provisioning* page.

5 Click **Provision Microsoft Entra ID Groups**.

6 Move the **Enabled** slider to **No**.



7 Click **Save** and then click **Yes** to confirm your changes.

8 Close the window and return to the *Provisioning* page.
It might take a moment to refresh the page.

After you finish

Configure your Microsoft Entra ID user settings.

Configuring Microsoft Entra ID user settings

To define how identity data flows between Microsoft Entra ID and Genetec ClearID™, you must configure your user settings and map attributes for automatic synchronization.

Before you begin

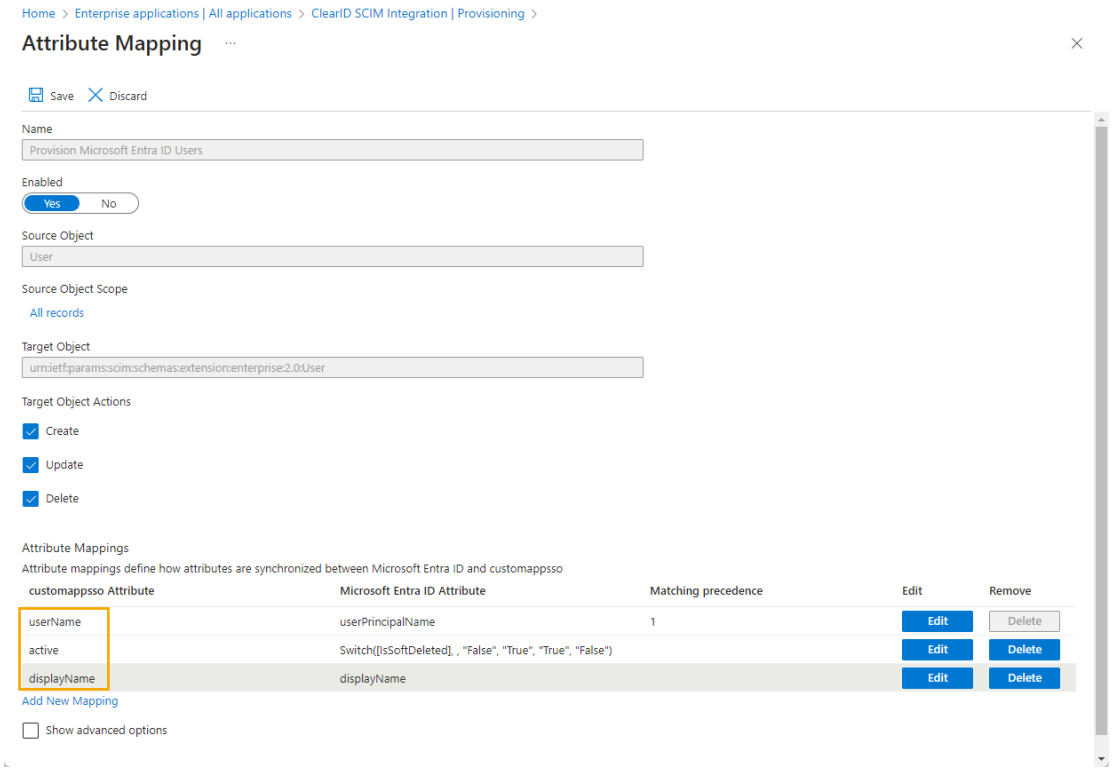
Disable your Microsoft Entra ID groups setting.

What you should know

This procedure is for the ClearID deployment team, your IT department, or the people responsible for administering Microsoft Entra ID in your organization.

Procedure

1 In the Microsoft Azure portal, search for and click **Enterprise applications**.
2 In the *Enterprise applications* section, search for and select your ClearID SCIM integration application.
3 In the *Manage* section, click **Provisioning** and then click **Provisioning** again.
4 Expand the *Mappings* section and click **Provision Microsoft Entra ID Users**.
5 Modify the default attribute mappings.
   a) On the *Attribute Mapping* page, click **Delete** to remove unused default attributes.
   Only keep the following:
   - userName
   - active
   - displayName



   b) Click **Save** and then click **Yes** to confirm your changes.

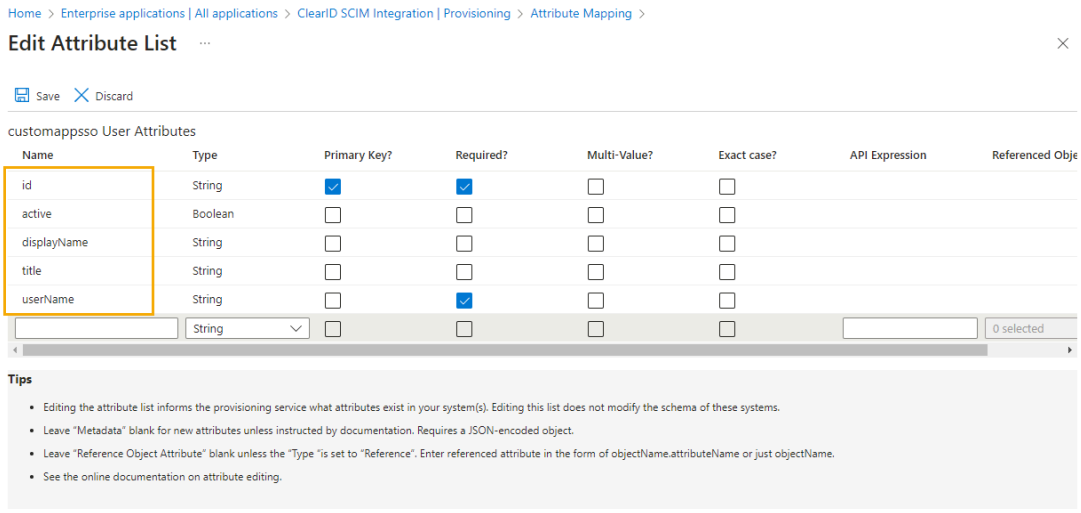
6 Modify the customappsso user attributes.

a) On the *Attribute Mapping* page, click **Show advanced options**.

b) Click **Edit attribute list for customappsso**, and then click **Delete** to remove all the unused default attributes.

Only keep the following:

- id
- active
- displayName
- title
- userName



c) Click **Save** and then click **Yes** to confirm your changes.

7 Add the ClearID schema attributes.

Only include the list of attributes available to ClearID:

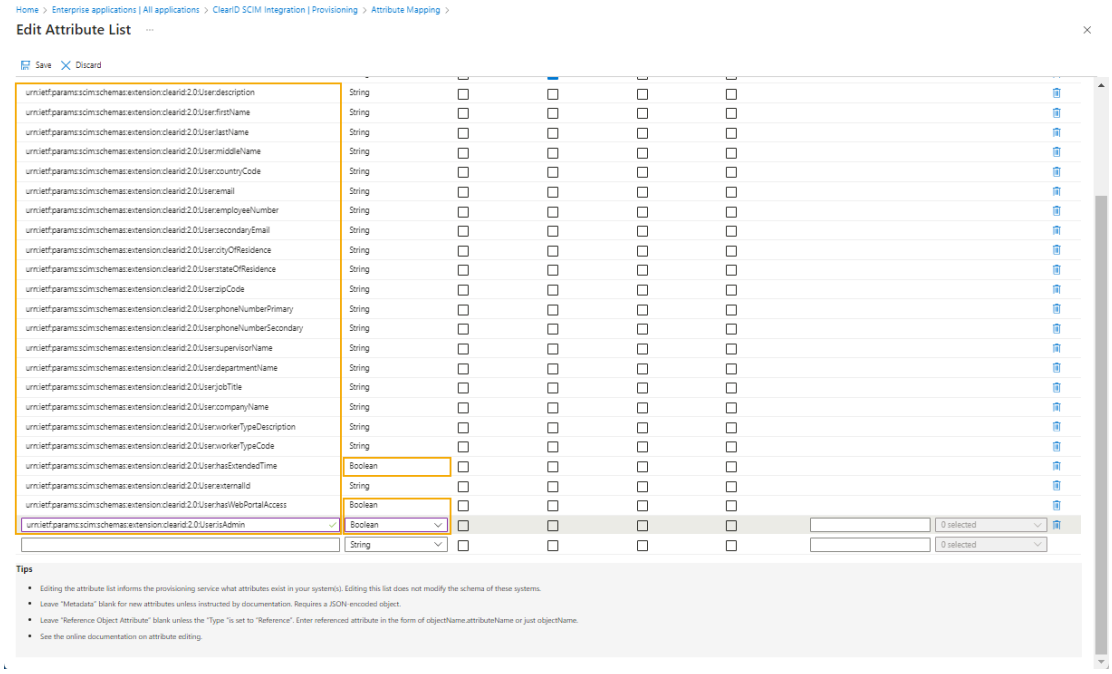
```
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:description
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:firstName
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:lastName
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:middleName
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:countryCode
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:email
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:employeeNumber
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:secondaryEmail
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:cityOfResidence
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:stateOfResidence
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:zipCode
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:phoneNumberPrimary
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:phoneNumberSecondary
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:supervisorName
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:departmentName
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:jobTitle
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:companyName
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:workerTypeDescription
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:workerTypeCode
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:hasExtendedTime
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:externalId
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:hasWebPortalAccess,
 Boolean
urn:ietf:params:scim:schemas:extension:clearid:2.0:User:isAdmin, Boolean
```

a) On the *Edit Attribute List* page, copy and paste an attribute name from the preceding ClearID schema attributes code example into the **Name** field and select the attribute **Type**.

Almost every attribute has the type **String**, except for three attributes that have the **Boolean** type: hasExtendedTime, hasWebPortalAccess, and UserisAdmin.

IMPORTANT: The ClearID externalId attribute is the unique identifier that ClearID uses for synchronization. It's mapped to the unique objectId attribute in Microsoft Entra ID.

b) Repeat for each attribute listed in the preceding ClearID schema attributes code example.



c) Click **Save** and then click **Yes** to confirm your changes.

8 Add the ClearID attribute mappings.

a) On the *Attribute Mapping* page, click **Add New Mapping**.

b) On the *Edit Attribute* page, add the attributes that you require from the attributes added earlier in step 7.

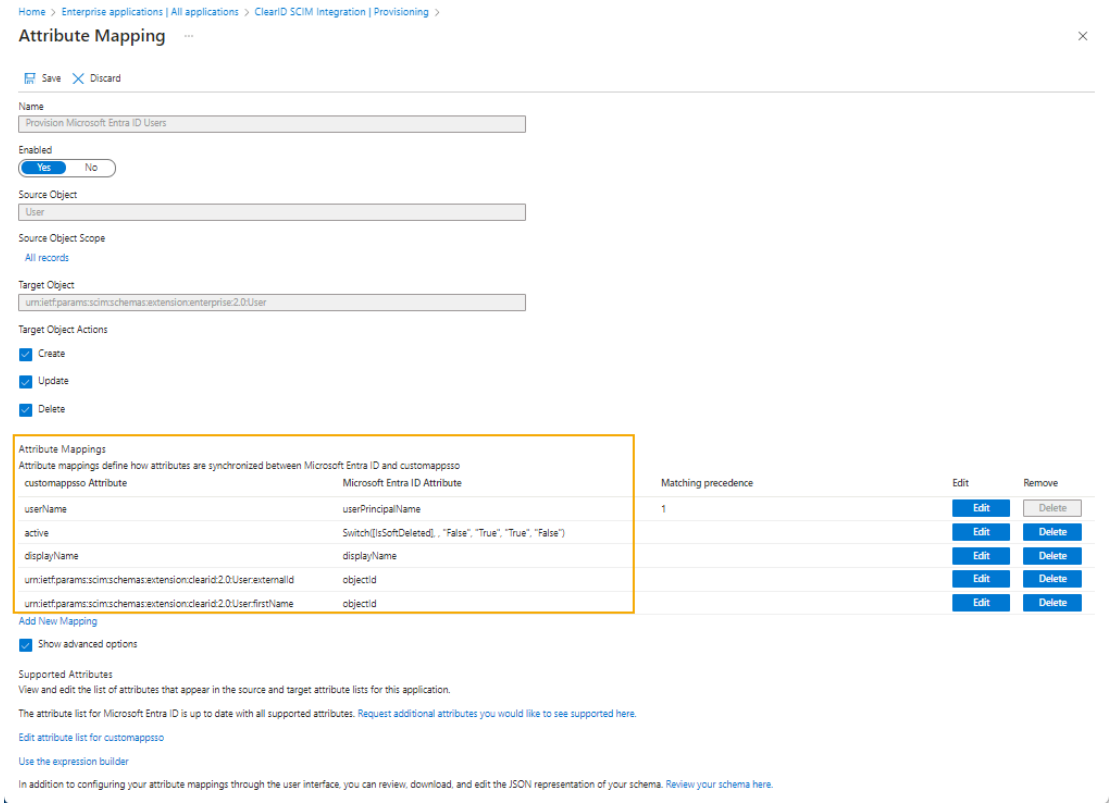
Include the following:

- Mapping type: **Direct**
- Source attribute: **objectid**
- Target attribute: *<your attribute value>*

c) Click **OK**.

d) Repeat for each attribute added earlier and replace the target attribute value with the next attribute you want to add.

For a successful first synchronization, you need the following attributes. You can add more attributes later.



NOTE: The objectid is the GUID in azure. There's no way to manipulate the objectid of a user in Azure. It's a hard-coded field that can't be modified.

e) Click **Save** and then click **Yes** to confirm your changes.

You can now close the window and return to the *Provisioning* page.

After you finish

Configure the ClearID SCIM integration synchronization settings.

Configuring the ClearID SCIM integration synchronization settings

To determine what identity data is synchronized to Genetec ClearID™, you must select the required synchronization settings and activate provisioning in Microsoft Azure.

Before you begin

Configure your Microsoft Entra ID user settings.

What you should know

This procedure is for the ClearID deployment team, your IT department, or the people responsible for administering Microsoft Entra ID in your organization.

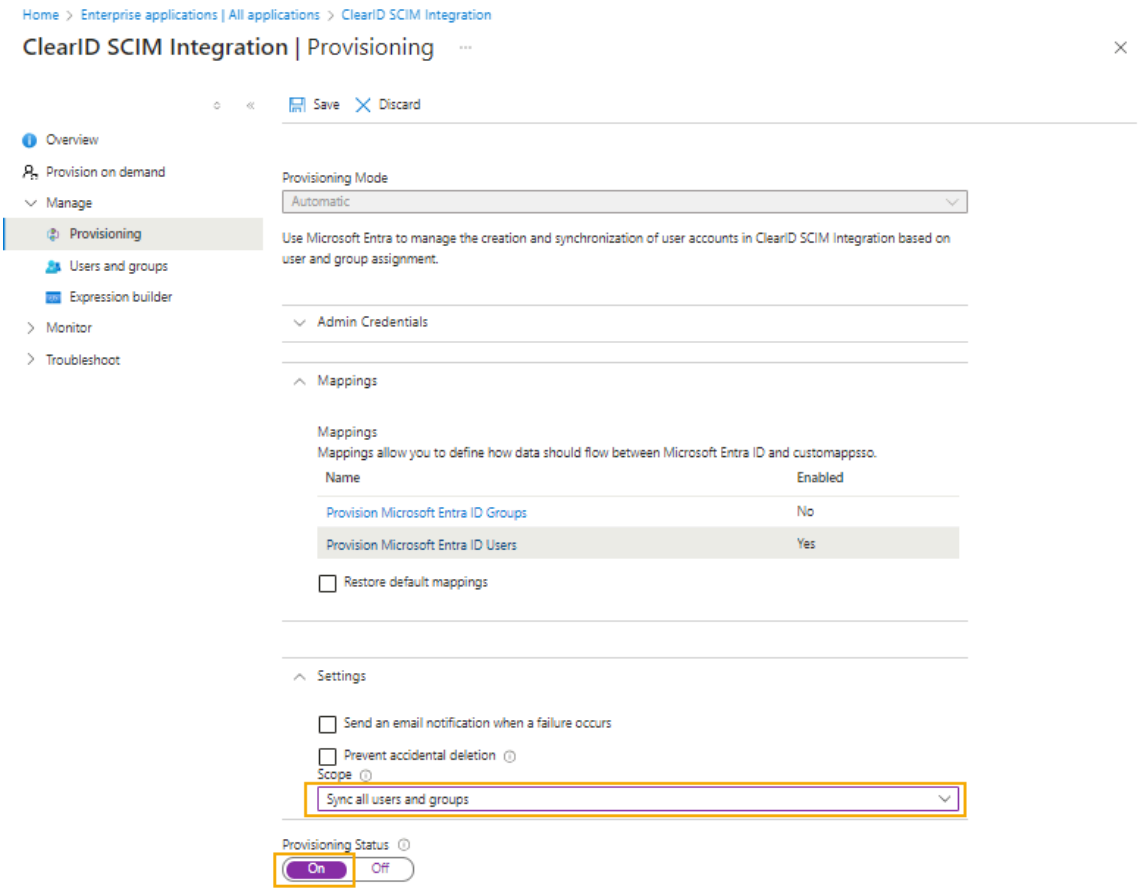
Procedure

1 On the *Provisioning* page, click **Settings** and choose which users to synchronize to ClearID:

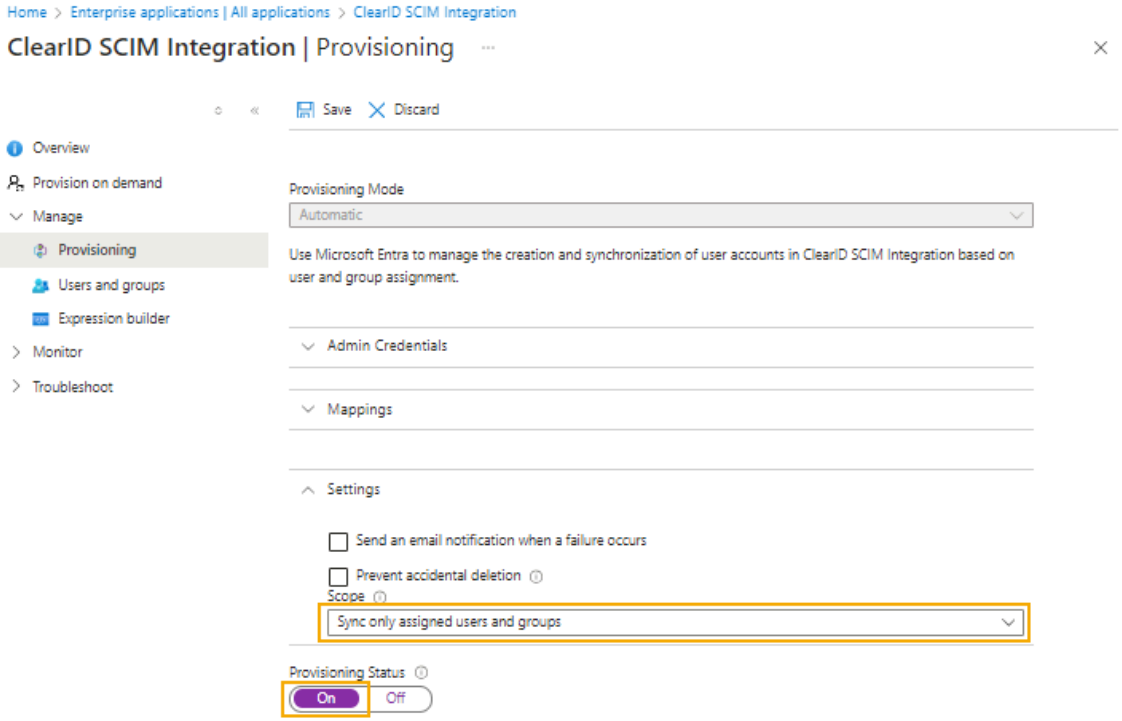
- **Sync all users and groups:** Synchronizes everything in Microsoft Entra ID.
- **Sync only assigned users and groups:** Only selected users and groups are synchronized.

IMPORTANT: ClearID doesn't support group synchronization. Depending on the provisioning settings that you select, either all users identity data or only selected users identity data is synchronized.

2 If you chose **Sync all users and groups**, in the *Provisioning status* section, move the slider to **On** and click **Save**.



3 If you chose **Sync only assigned users and groups**, complete the provisioning settings.
   a) Click **Users and groups** in the left navigation bar.
   b) Click **Add group**.
   c) Click **None selected**, search for and select the group you want to add, and click **Select**.
   d) Click **Assign** and repeat for each group that you want to add.
   e) Return to the *Provisioning* page and click **Settings**.
   f) In the *Provisioning status* section, move the slider to **On** and click **Save**.



After you finish

Review the ClearID SCIM integration synchronization status.

Resetting SCIM integration identity data

To resolve issues with identity data, you can reset and replace all System for Cross-domain Identity Management (SCIM) integration identity data in Genetec ClearID™. This reset process uses the latest values from Microsoft Entra ID.

What you should know

This procedure is for the ClearID deployment team, your IT department, or the people responsible for administering Microsoft Entra ID in your organization.

Only use this reset to resolve an identity data issue. For example, after your identity data has been manually manipulated, when there's a discrepancy, or when identity data has been deleted in ClearID.

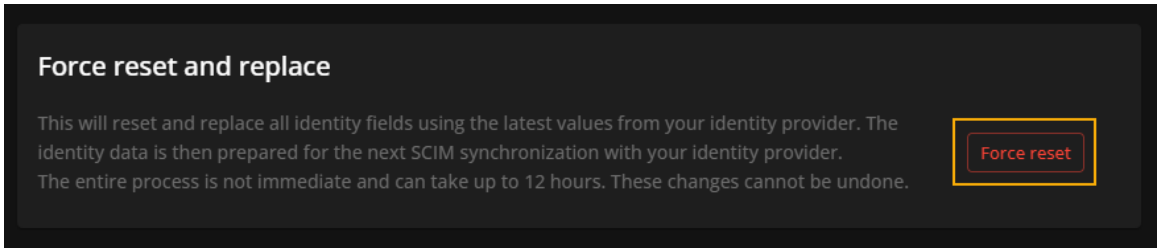
The reset will prepare identity data for the next SCIM synchronization between ClearID and Microsoft Entra ID. This process only pushes identity data changes in one direction, to Entra ID.

IMPORTANT: The entire process can take up to 12 hours. These changes can't be undone.

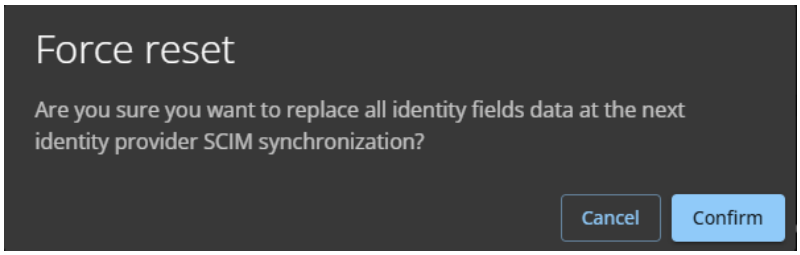
Procedure

1 In the ClearID portal, click **Administration** > **SCIM Integration**.

2 In the *Force reset and replace* section, click **Force reset**.



3 Click **Confirm** to reset and replace your identity data.



After you finish

Check the SCIM integration synchronization status to confirm that your identity data has been reset.

Reviewing the SCIM integration synchronization status

You can check the overall status of the System for Cross-domain Identity Management (SCIM) integration identity synchronization. You can also review the provisioning logs in Microsoft Azure to see more granular details about Genetec ClearID™ SCIM integration synchronization activities related to a specific person or identity.

What you should know

This procedure is for the ClearID deployment team, your IT department, or the people responsible for administering Microsoft Entra ID in your organization.

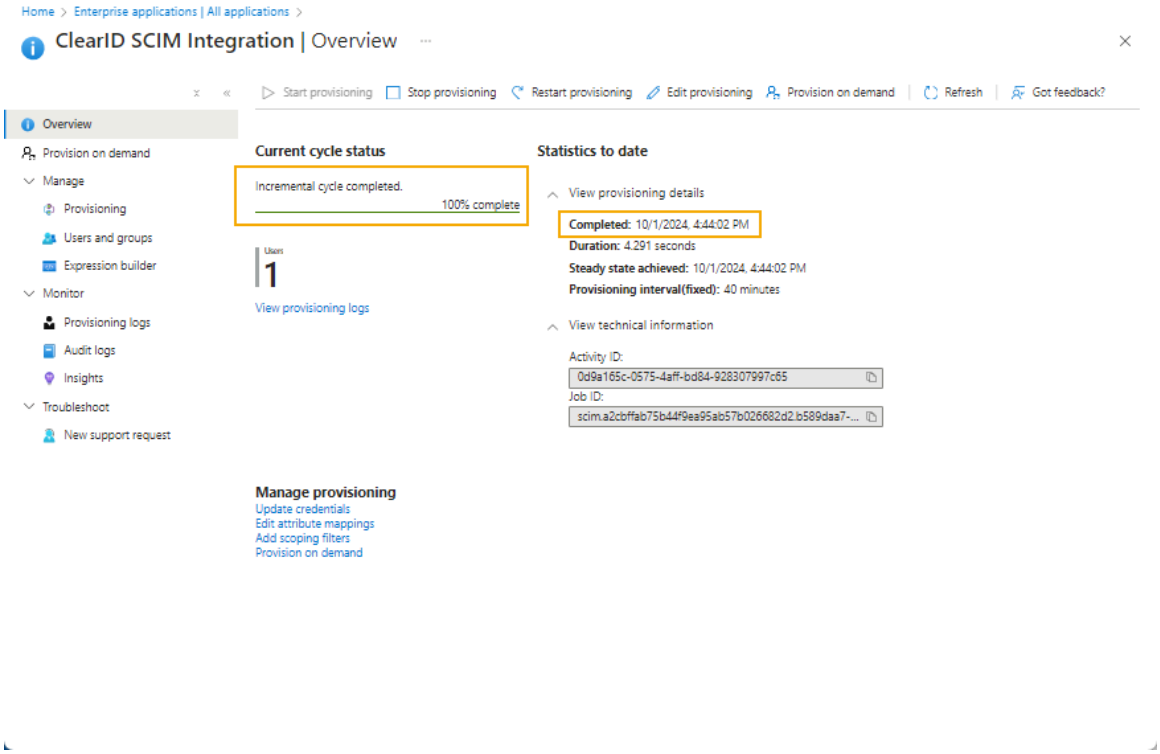
The provisioning logs can be used to verify whether the ClearID SCIM integration is correctly configured and operational. If there are any issues with the configuration, error messages are generated and recorded in the provisioning logs.

Procedure

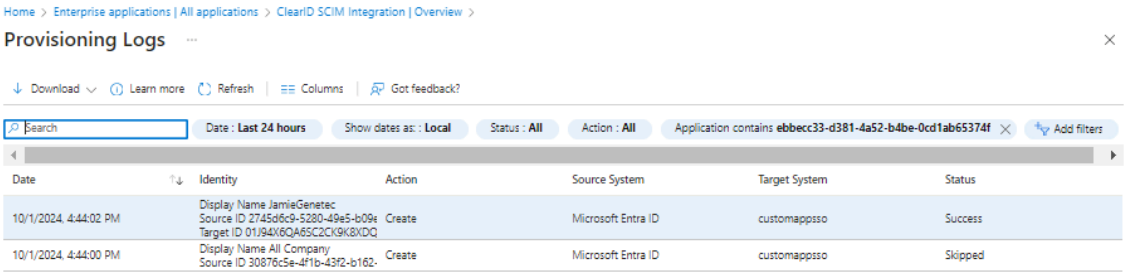
1 In the Microsoft Azure portal, find and click **Enterprise applications**.

2 In *Enterprise applications*, select your SCIM integration application.

3 On the *Overview* page, check whether the last synchronization completed successfully and when the last synchronization occurred.



4 (Optional) Click **View provisioning logs** to see more granular information about identity synchronization.



NOTE: If the log details are long, the *Provisioning Logs* page includes useful filters to manipulate the data for your needs.

Synchronizing identities using One Identity

Use the Genetec ClearID™ One Identity Synchronization Tool to synchronize external system attributes into Genetec ClearID™ identity attributes. These identity attributes in ClearID can then be used to assign people to roles and automate role-based access control.

What you should know

Using the One Identity Synchronization Tool you can synchronize external system attributes from the following data sources:

- Azure AD
- Database (Microsoft SQL Server, Oracle Database, ODBC)
- File (CSV)

Procedure

1 Learn about the One Identity Synchronization Tool.

2 Learn about One Identity attribute fields.

3 Learn about the Azure web app.

4 Install the One Identity Synchronization Tool.

5 Configure the One Identity Synchronization Tool.

6 Review synchronization status.

Related Topics

Connectivity issues (One Identity Synchronization Tool) on page 662
Data synchronization issues (One Identity Synchronization Tool) on page 663

About the One Identity Synchronization Tool

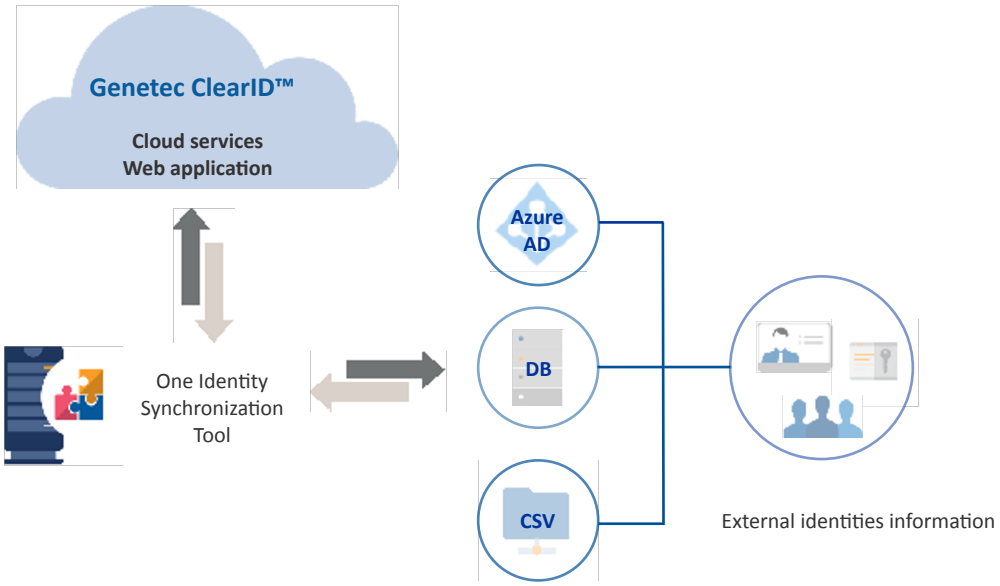
The Genetec ClearID™ One Identity Synchronization Tool is a Windows service that you can use to import identities information from an external system into Genetec ClearID™.

The ClearID One Identity Synchronization Tool includes the following components:

- **Genetec.ClearID.OneIdentity.SynchronizationTool** (*OneIdentityConfigurationTool.exe*) is the user interface component of the windows application that is used to configure the Synchronization Tool.
- **Genetec.ClearID.OneIdentity.SynchronizationService** (*OneIdentityService.exe*) is the Windows service component of the application that performs external system attributes to ClearID identity attributes synchronization automatically in the background at intervals specified in the Synchronization Tool.

Data sources

You can select one or more data sources to be synchronized from an external system. Using the *Data sources configuration* dialog you configure the **Data sources** and map the One Identity attributes to their associated external system attributes.



- **Azure Active Directory:** The Azure AD data source is an Azure Active Directory that you can import identities information from. For example, importing identities, credentials, and pictures into ClearID.
- **Database:** The database data source can be a Microsoft SQL Server database, an Oracle database, or an ODBC-compliant database that follows the one identity attribute mapping. The database must be accessible from the server where the ClearID One Identity Synchronization Tool is installed. One database can contain one table or view for identities information.
- **File:** The file data source is a delimited text file. For example, a CSV file that follows the one identity attribute mapping, and must be accessible from the server where the ClearID One Identity Synchronization Tool is installed. Each file contains identities information.

Synchronization

Identities in ClearID can come from a variety of data sources (Databases, HR, External Sources) and can be synchronized using various tools (Genetec ClearID™ LDAP Synchronization Agent, Genetec ClearID™ API, or Genetec ClearID™ One Identity Synchronization Tool).

- LDAP is typically used for Active Directory attributes synchronization into ClearID identities.
- API is typically used for real-time updates. For example, to remove people quickly. This API synchronization option is the most flexible but it is expensive.
- One Identity is typically used for HR systems. For example, to synchronize all employees every day or every 4hrs. The ClearID One Identity Synchronization Tool is configured to synchronize at the same frequency.

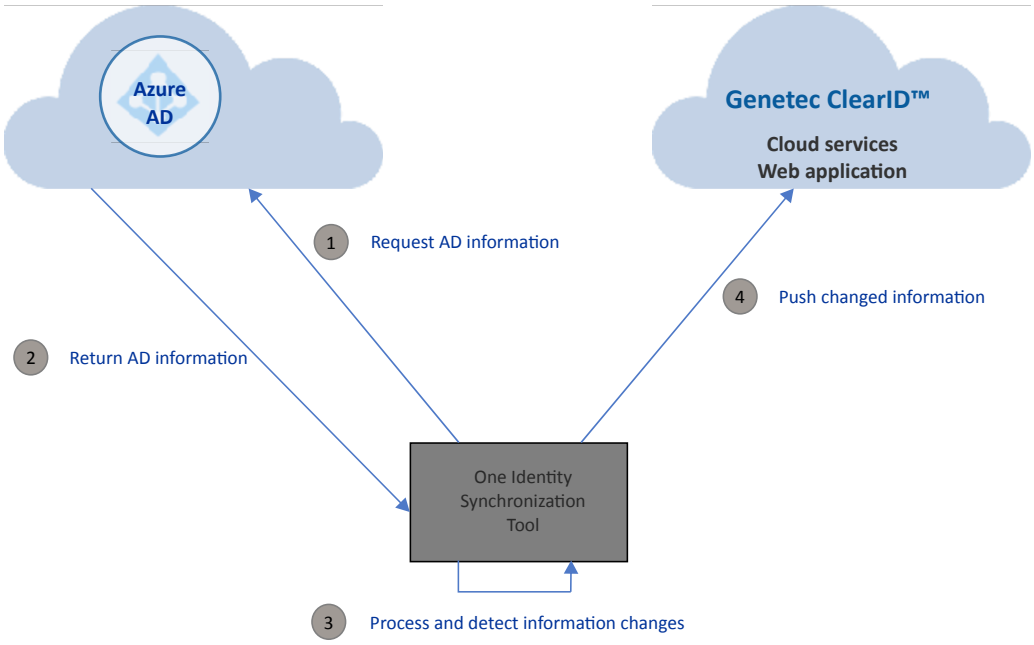
One Identity data synchronization

The following information describes One Identity synchronization:

- Synchronization of external system attributes into ClearID identity attributes is INBOUND only.

  CAUTION: Any changes only made to identities in ClearID can be overwritten by the next synchronization from the external system.
- Synchronization can be performed manually using the **Synchronize now** ( ) option, or automatically at the **Automatic synchronization** intervals specified in the One Identity Synchronization Tool.
  - For each **One Identity field** that is configured, a custom mapping to the **External field** in the external system is created. This mapping ensures that the external system attributes can be synchronized into the One Identity attribute fields.

The following diagram illustrates an Azure AD data synchronization:



The synchronization workflow is essentially the same for all data sources:

1. Data source information is requested.
2. Data source information is returned.
3. Any information changes are processed and detected.
4. Data source information is pushed to the ClearID web application.

Sample SQL files

For the **Database** data source option, sample SQL script files are provided with the tool and can be found here:

C:\Program Files (x86)\Genetec ClearID One Identity Synchronization Service

- *Identities_Oracle.sql*
- *Identities_SqlServer.sql*

The sample SQL script files can be used to test the **Database** data source solution, or to help you understand the SQL data format.

Sample CSV files

For the **File** data source option, a sample CSV file is provided with the tool and can be found here:

C:\Program Files (x86)\Genetec ClearID One Identity Synchronization Service

- *Identities.csv*

The sample CSV files can be used to test the **File** data source solution, or to help you understand the CSV data format.

About One Identity Synchronization Tool attribute fields

When you synchronize an external system with Genetec ClearID™ using the Genetec ClearID™ One Identity Synchronization Tool, your external system attributes are synchronized (imported) into ClearID identity attributes using the field mappings in the One Identity Synchronization Tool.

NOTE: The data source order is important because the first data source always overrides common fields.

Identity attributes

One Identity field	Data type	Description
Unique ID* * This field is mandatory.	Text field	A unique ID for the identity. The unique ID can be an alphanumeric code or an email address. For example, Employee number *xyz12345*. **IMPORTANT:** (Azure Active Directory only) If you ever change the mapping of the Unique ID it can cause duplicate data issues.
Activation date	DateTime	The date that the identity is activated. For example, 1/11/2022. **NOTE:** All invariant culture DateTime formats are supported.
City	Text field	The city where the identity is located. For example, Paris.
Company	Text field	The company name. For example, Genetec™.
Country code	Text field	The three letter country code (UPPERCASE). For example, the USA or CAN. **NOTE:** The three-letter country codes are based on the Alpha-3 codes in the ISO 3166-1 country codes standard.
Date of birth	DateTime	The identity's date of birth. For example, 7/21/2022. **NOTE:** All invariant culture DateTime formats are supported.
Department	Text field	The department name. For example, IT or Marketing.
Description	Text field	The identity description.
Email address	Text field	The primary email address (business email) for the identity. For example, johndoe@test.com
Employee number	Text field	The identity's employee number.

One Identity field	Data type	Description
Expiration date	DateTime	The date that the identity expires. **NOTE:** All invariant culture DateTime formats are supported.
First name	Text field	The first name of the identity.
Job title	Text field	The job title of the identity.
Last name	Text field	The last name of the identity.
Middle name	Text field	The middle name of the identity
Mobile phone number	Text field	The secondary phone number (Mobile phone number) For example, 555-555-5555.
Personal email	Text field	The secondary email address (personal email) for the identity. For example, johndoe2@test.com
Phone number	Text field	The primary phone number (Office phone number) For example, 555-555-5555.
Picture	Image	A picture in the format of a blob, a base64 string, or a path to an image. Supported values: • File path - uses a standard windows file path. The path must be accessible from the server. • base64 encoded string - uses a standard base 64 encoding. • Binary - binary data. Supported Image formats: png, jpeg, and bmp.
Preferred name	Text field	The preferred name of the identity.
Provisioning attributes	Text field	Provisioning attributes as defined and configured by the customer for their environment. The list items are separated by a pipe character "|". For example, A1| A2| A3.
State or province	Text field.	The state or province where the identity is located.
Status	Text field	The Identity activation status. For example, Active or Inactive.
Supervisor name	Text field	The name of the identity's supervisor.
Supervisors	Text field	The list of unique supervisor IDs for the identity. The list items are separated by a pipe character "|". For example, A1| A2| A3.
Use extended grant time	Boolean value	The value that enables or disables the **Use extended grant time** option. For example, TRUE or FALSE.
User type	Text field	The type of user. For example, **Admin** or **User**.

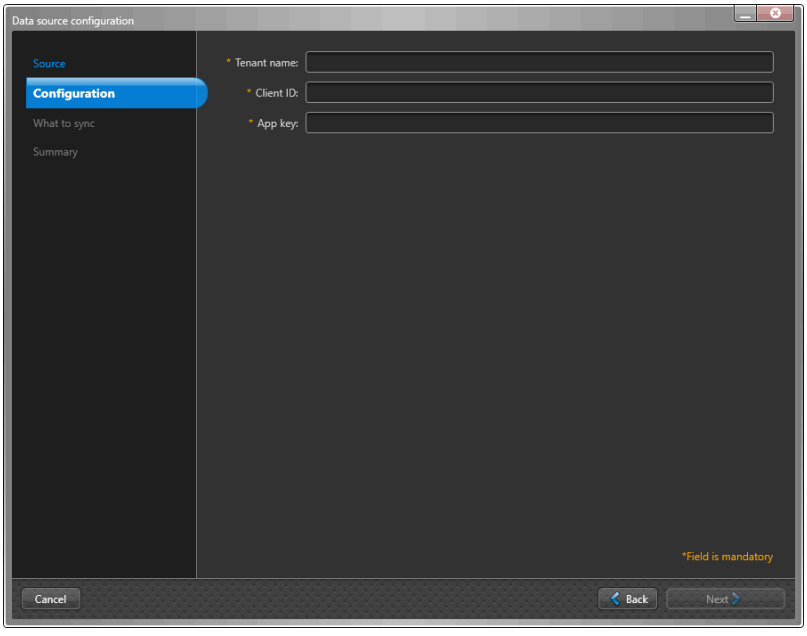
One Identity field	Data type	Description
Username	Text field	The email used by the identity to log on to ClearID.
Web portal access	Text field	The value that enables or disables **web portal access**. For example, 0 FALSE or 1 TRUE.
Worker type code	Text field	The worker type code.
Worker type description	Text field	The worker type description.
Zip or postal code	Text field.	The Zip or postal code of the identity's location.

About the Azure web app

The Azure web app is a web application that is used to connect Genetec ClearID™ One Identity Synchronization Tool to the Azure AD data so that the Active Directory user information can be accessed and synchronized.

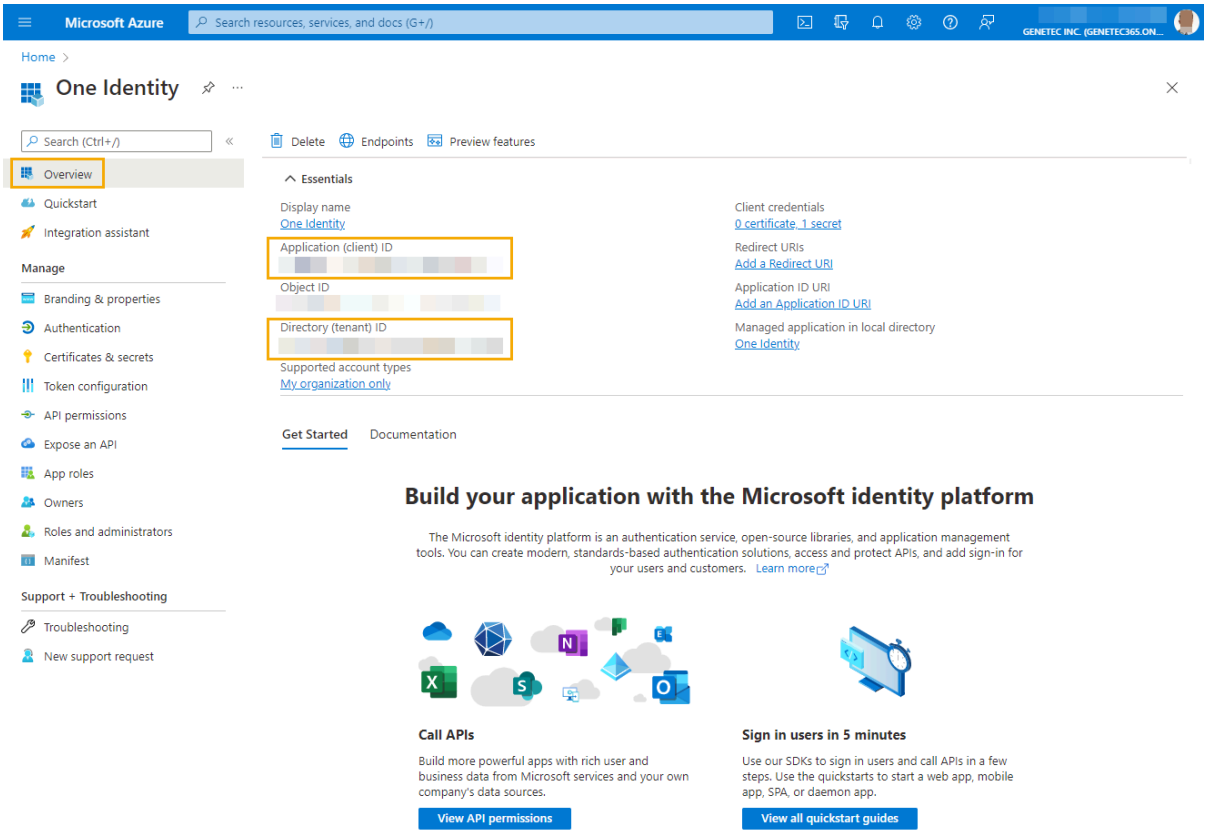
Connection information for Azure web app

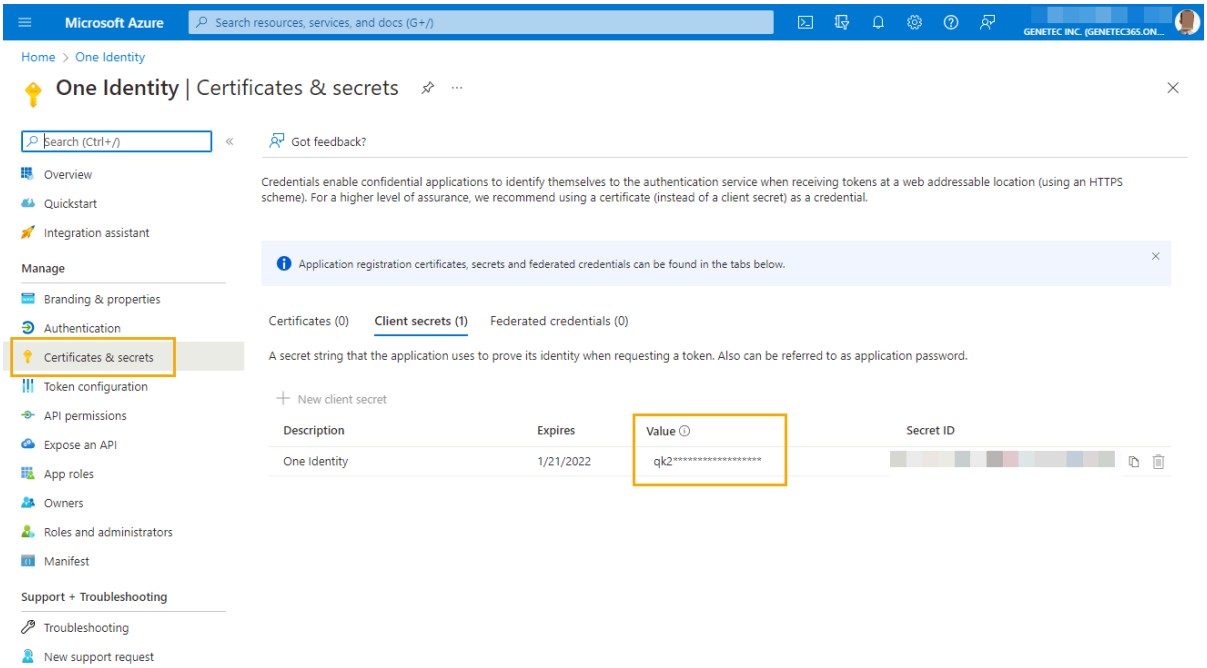
To connect the Azure web app to the ClearID One Identity Synchronization Tool, you need the following information:



- Tenant name (Directory ID for account)
- Client ID (Application ID)
- App key (Client secret value)

TIP: The Tenant name, Client ID, and App key can be obtained from your Azure Active Directory application registration.


Microsoft Azure
Search resources, services, and docs (G+/)
Home
One Identity
Search (Ctrl+/)
Overview
Quickstart
Integration assistant
Manage
Branding & properties
Authentication
Certificates & secrets
Token configuration
API permissions
Expose an API
App roles
Owners
Roles and administrators
Manifest
Support + Troubleshooting
Troubleshooting
New support request
Delete
Endpoints
Preview features
Essentials
Display name
One Identity
Application (client) ID
Object ID
Directory (tenant) ID
Supported account types
My organization only
Client credentials
0 certificate, 1 secret
Redirect URIs
Add a Redirect URI
Application ID URI
Add an Application ID URI
Managed application in local directory
One Identity
Get Started
Documentation
Build your application with the Microsoft identity platform
The Microsoft identity platform is an authentication service, open-source libraries, and application management tools. You can create modern, standards-based authentication solutions, access and protect APIs, and add sign-in for your users and customers. Learn more
Call APIs
Build more powerful apps with rich user and business data from Microsoft services and your own company's data sources.
View API permissions
Sign in users in 5 minutes
Use our SDKs to sign in users and call APIs in a few steps. Use the quickstarts to start a web app, mobile app, SPA, or daemon app.
View all quickstart guides


Microsoft Azure
Search resources, services, and docs (G+/)
Home
One Identity
One Identity | Certificates & secrets
Search (Ctrl+/)
Got feedback?
Overview
Quickstart
Integration assistant
Manage
Branding & properties
Authentication
Certificates & secrets
Token configuration
API permissions
Expose an API
App roles
Owners
Roles and administrators
Manifest
Support + Troubleshooting
Troubleshooting
New support request
Credentials enable confidential applications to identify themselves to the authentication service when receiving tokens at a web addressable location (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret) as a credential.
Application registration certificates, secrets and federated credentials can be found in the tabs below.
Certificates (0)
Client secrets (1)
Federated credentials (0)
A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.
New client secret
Description
Expires
Value
Secret ID
One Identity
1/21/2022
qk2**********

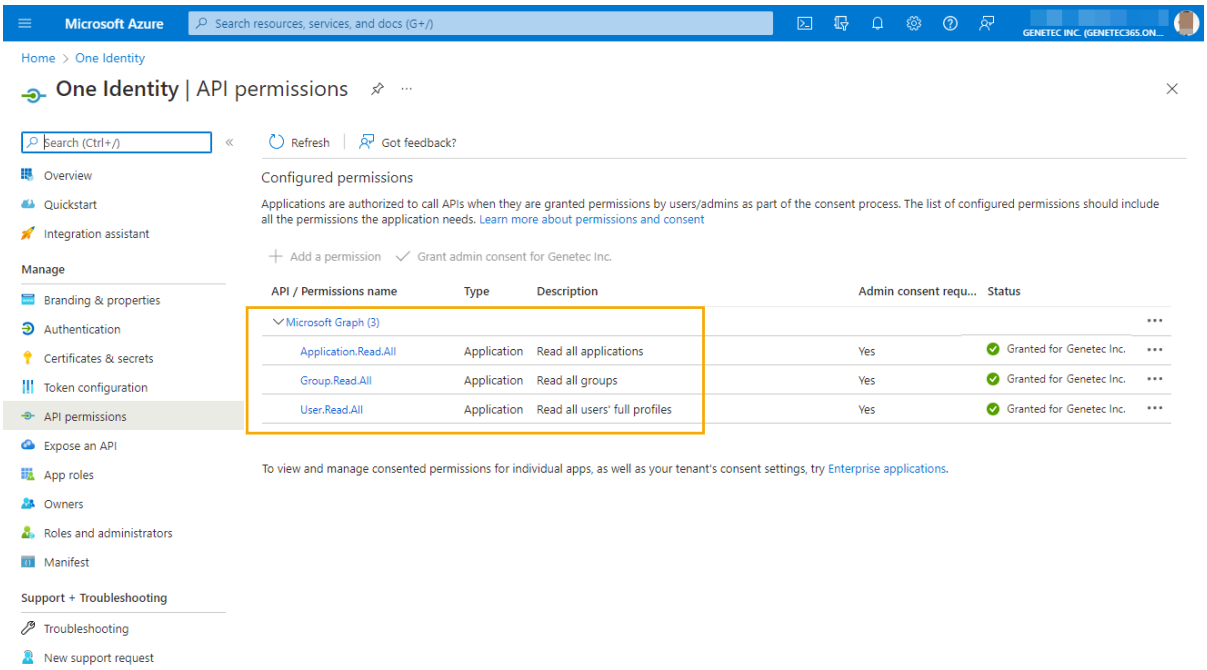
Azure AD API permissions

Before you can synchronize data with ClearID, an external system attributes administrator (IT or security personnel) must set up and configure the following API read permission privileges in Azure AD.

Microsoft Graph (minimum requirements):

- *Application.Read.All* - Used to get extensions attributes.
  - Allows the app to read applications and service principals without a signed-in user.

  For more information, see List extensionProperties (directory extensions)
- *User.Read.All* - Used to get user information.
  - Allows the app to read identity user risk information for all users in your organization without a signed-in user.
- *Group.Read.All* - Used to get group information.
  - Allows the app to read group properties and memberships, and read conversations for all groups, without a signed-in user.



For more information, see Microsoft Graph permissions reference.

Installing the One Identity Synchronization Tool

Before you can import identities information from an external system into Genetec ClearID™, you must first install the Genetec ClearID™ One Identity Synchronization Tool.

Before you begin

Obtain the latest installer package from your deployment contact.

What you should know

This procedure is for IT or security personnel responsible for external system attributes administration.

Install the One Identity Synchronization Tool on its own dedicated server. It does not require a Security Center server.

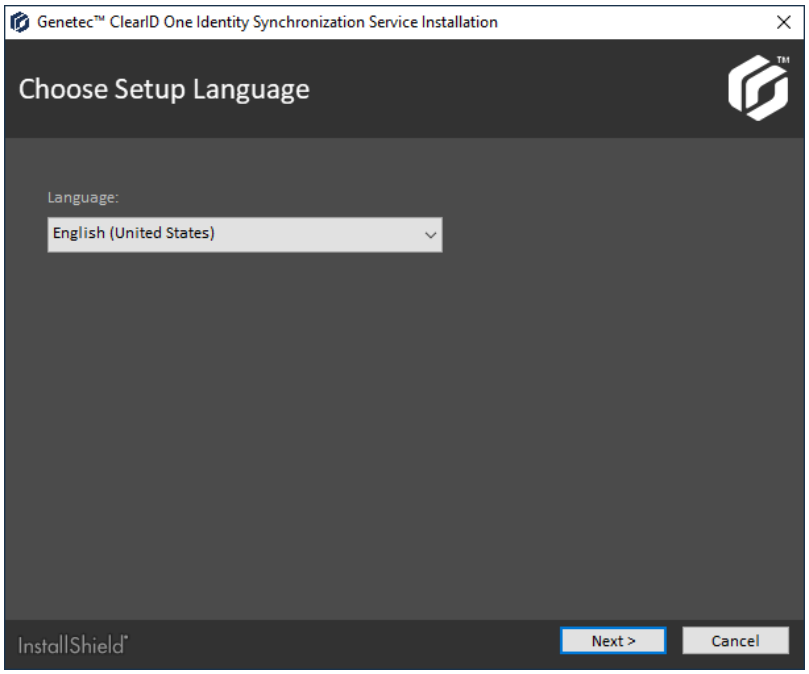
NOTE: The One Identity Synchronization Tool is not generally available as a public download. The synchronizer download is supplied by your Deployment contact when needed.

Procedure

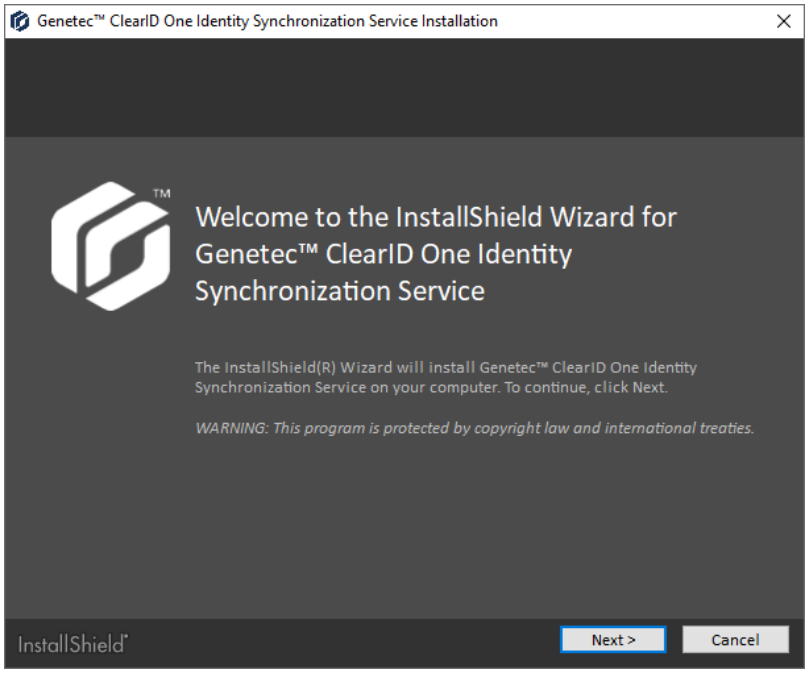
1 Navigate to the ClearID One Identity Synchronization Tool installer supplied by your deployment contact.

2 Right-click the *setup.exe* file. Then click **Run as administrator** and follow the installation instructions.

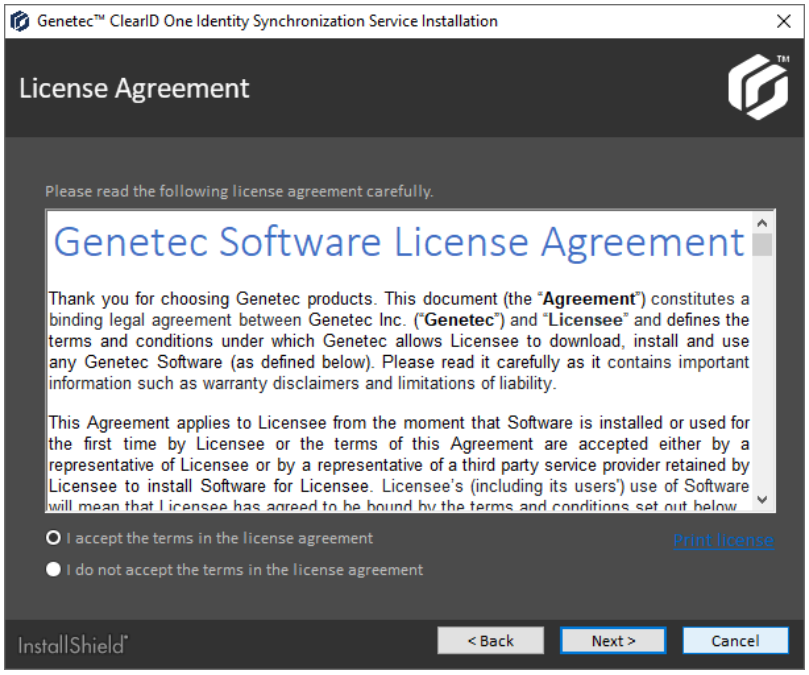
3 In the *Genetec ClearID™ One Identity Synchronization Service Installation* dialog, select a setup language and click **Next**.



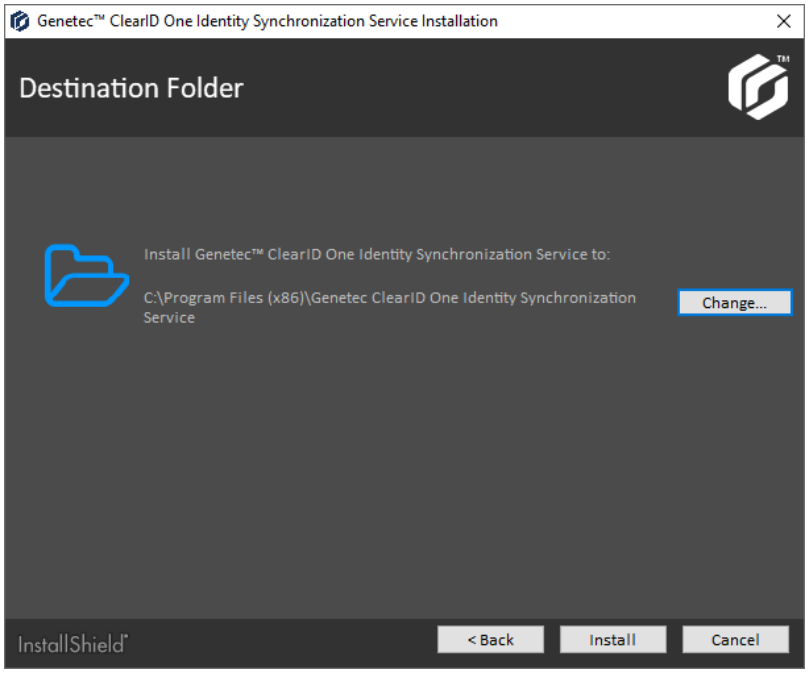
4 In the *Welcome to the InstallShield Wizard* section, click **Next**.



5 Review and accept the license agreement, then click **Next**.



6 Specify your destination folder.

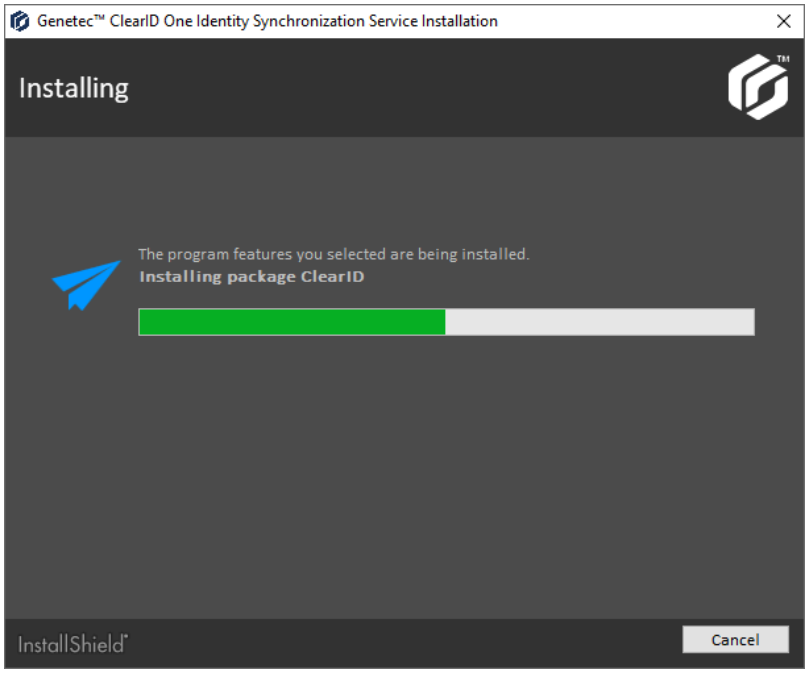


By default the service is installed at *C:\Program Files (x86)\Genetec ClearID One Identity Synchronization Service*.

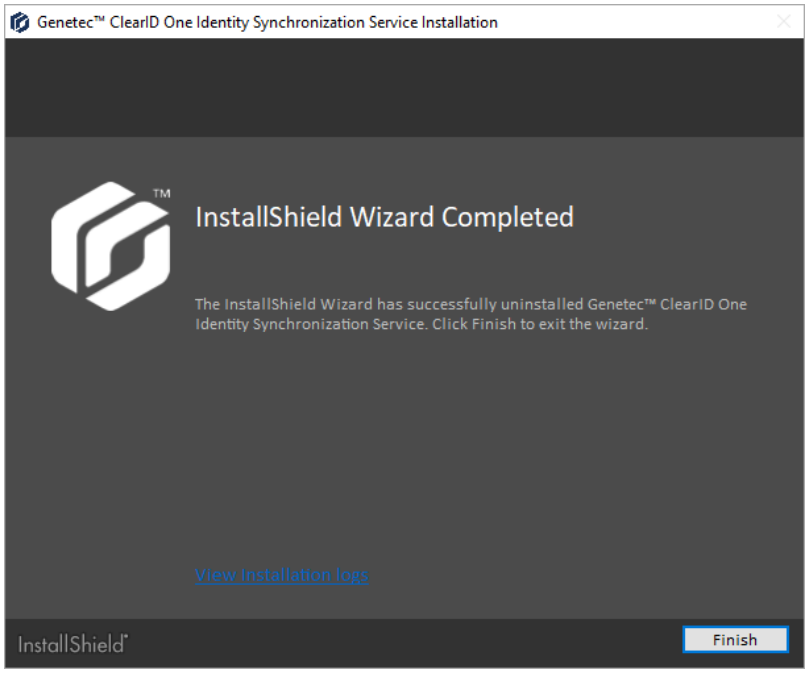
7 (Optional) Click **Change** to modify the destination folder.

a) In the **Browse For Folder** dialog, browse to and select the folder where you want the service installed and click **OK**.

8 Click **Install**.



9 Click **Finish** to complete the installation.



The ClearID One Identity Synchronization Tool is now installed.

After you finish

Configure the synchronization tool.

Uninstalling the One Identity Synchronization Tool

From time to time, you might want to uninstall the Genetec ClearID™ One Identity Synchronization Tool to fix a problem or install an updated version.

Before you begin

The Genetec ClearID One Identity Synchronization Tool must be installed.

What you should know

This procedure is for IT or security personnel responsible for external system attributes administration.

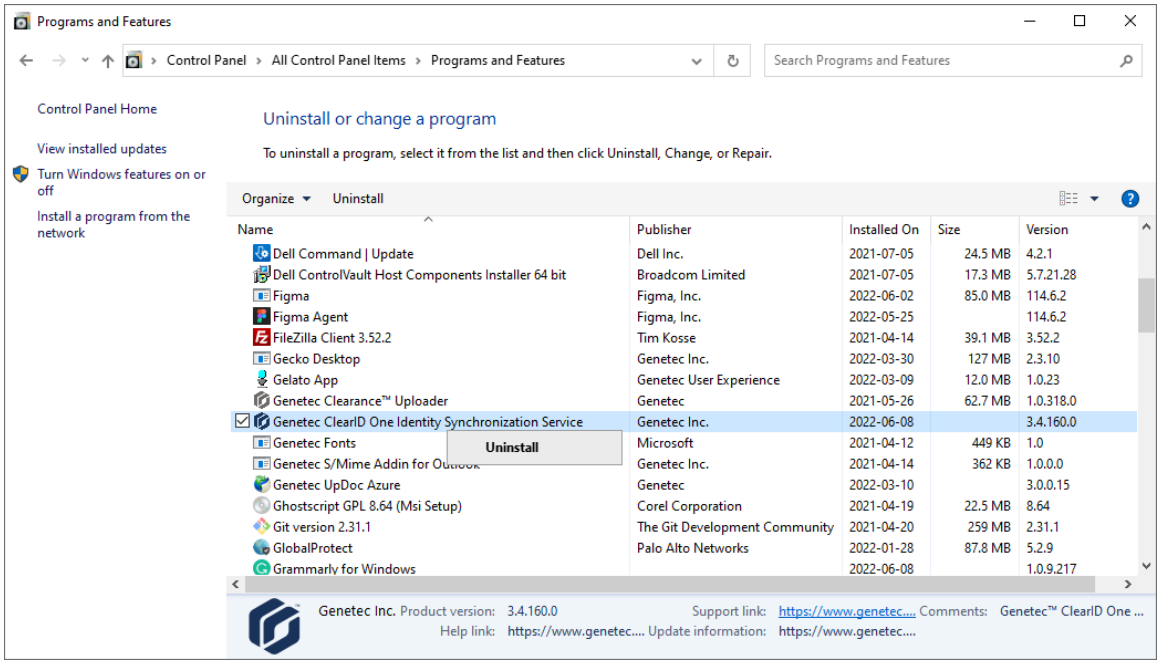
- The options that you encounter while uninstalling a program (service) might vary depending on the version of Windows that you are running.
- This procedure describes how to uninstall the synchronization tool (service) from a Windows 10 client.

CAUTION: The uninstall process deletes all configuration data. If you are upgrading, make sure that you back up your program data in the configuration folder *C:\ProgramData\Genetec\OneIdentity\Configuration*.

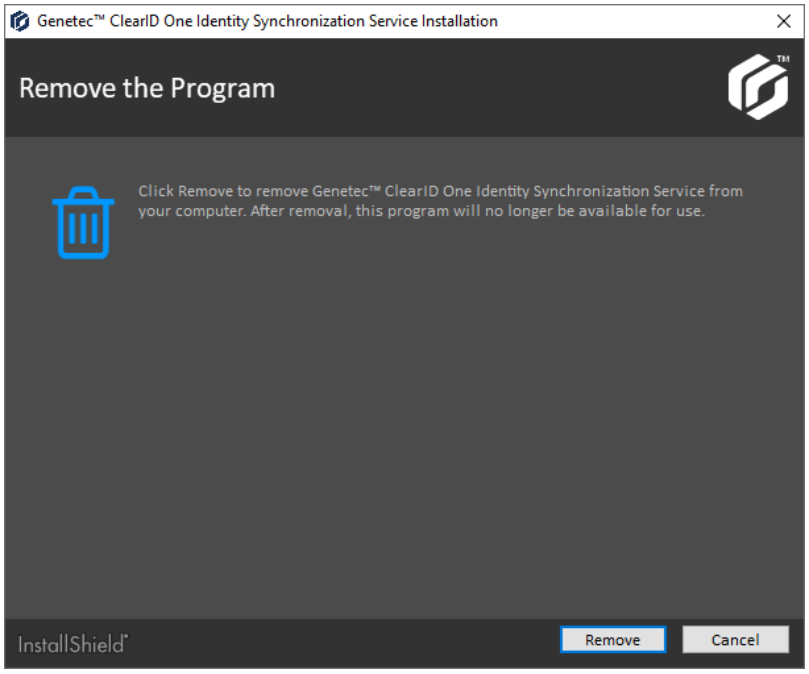
Procedure

1 Open the Windows **Control Panel**, and in the *Programs* section click **Uninstall a program** to access **Programs and Features**.

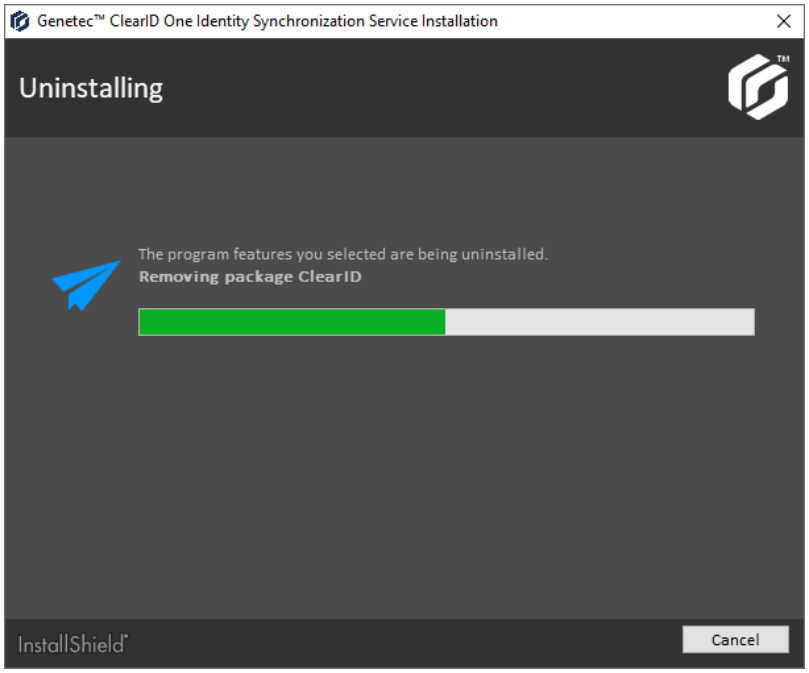
2 Find the ClearID One Identity Synchronization Tool service and right-click to display the **Uninstall** option, then click **Uninstall**.



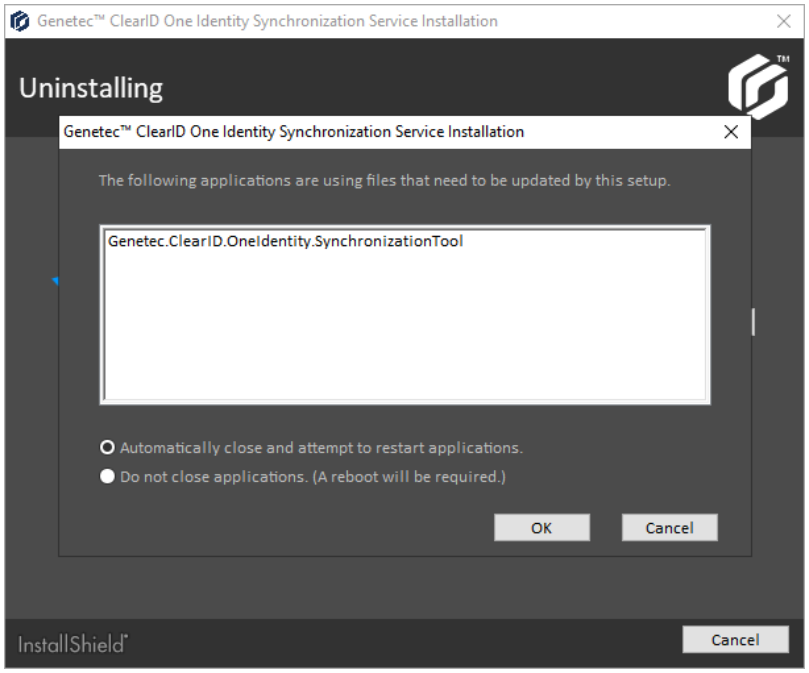
3 Click **Remove** to remove the program.



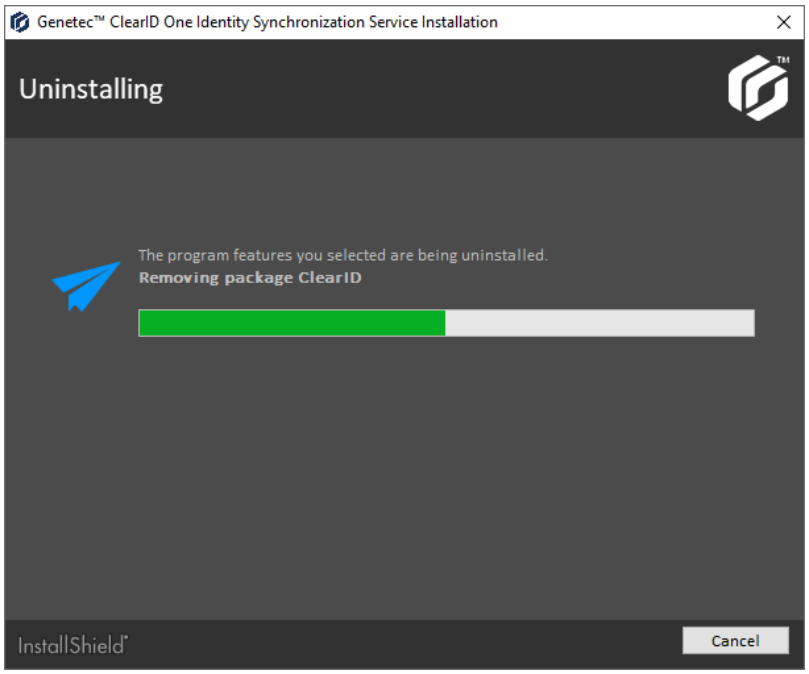
The program uninstall begins.



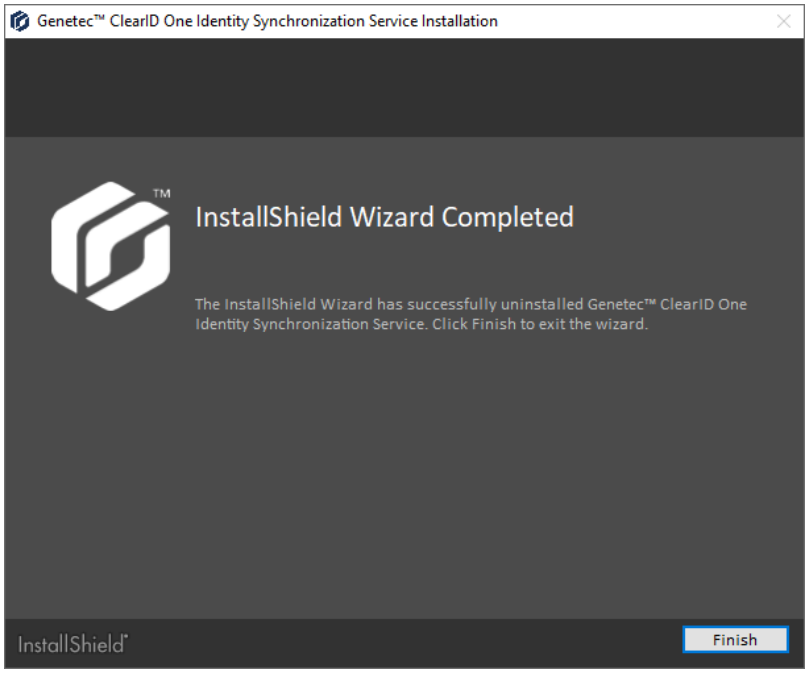
4 (Optional) If the following dialog is displayed, select **Automatically close and attempt to restart applications** then click **OK**.



The package continues to uninstall.



5 Click **Finish** to complete the uninstall.



The ClearID One Identity Synchronization Tool has now been uninstalled.

Upgrading the One Identity Synchronization Tool

Upgrade Genetec ClearID™ One Identity Synchronization Tool to the latest version when it becomes available so that you can use new features.

Before you begin

The Genetec ClearID One Identity Synchronization Tool must be installed.

What you should know

This procedure is for IT or security personnel responsible for external system attributes administration.

Procedure

1 Back up the configuration folder *C:\ProgramData\Genetec\OneIdentity\Configuration*.

The folder contains configuration settings. For example, *ApiConfiguration.dat*, *ClearIdEntityMappingFile.xml*, *Configuration.xml*, and *SingleCardEntityMapping.xml*.

NOTE: The *.dat* or *.xml* files that you encounter in the configuration folder vary depending on the settings that you configure in the ClearID One Identity Synchronization Tool.

2 Uninstall ClearID One Identity Synchronization Tool (previous version).

3 Install ClearID One Identity Synchronization Tool (latest version).

4 Validate the ClearID One Identity Synchronization Tool is working as expected.

NOTE: You should have the same data source configurations as before the upgrade.

The ClearID One Identity Synchronization Tool has now been upgraded.

Configuring the One Identity Synchronization Tool

Before you can synchronize an external system with Genetec ClearID™, you must first configure the Genetec ClearID™ One Identity Synchronization Tool.

Before you begin

- Familiarize yourself with the One Identity attribute fields.
- Verify the identities attributes values that you want to import and synchronize before synchronizing.
- Download a service authentication key.
- Install the One Identity Synchronization Tool.
- Check your license information: Part number CD-IDSYNC-SERVICE-1Y is required for One Identity Synchronization Tool import.

IMPORTANT: Make sure that the file is not being edited and is closed, because the synchronization tool locks the file during the synchronization process.

What you should know

This procedure is for IT or security personnel responsible for external system attributes administration.

Synchronization of external system attributes into ClearID identity attributes is INBOUND only.

CAUTION: Any changes only made to identities in ClearID can be overwritten during the next synchronization from the external system.

Procedure

1 Configure your connection settings.

2 Configure data source settings for one of the following sources:

- Azure AD
- Database (Microsoft SQL Server, Oracle Database, ODBC)
- File (CSV)

3 Configure your synchronization settings.

4 Click **Save**.

After you finish

Verify that the new attributes from the external system have been synchronized and contain the correct attributes.

Configuring connection settings

Before you can synchronize an external system with Genetec ClearID™, you must first configure the Genetec ClearID™ One Identity Synchronization Tool connection settings.

Before you begin

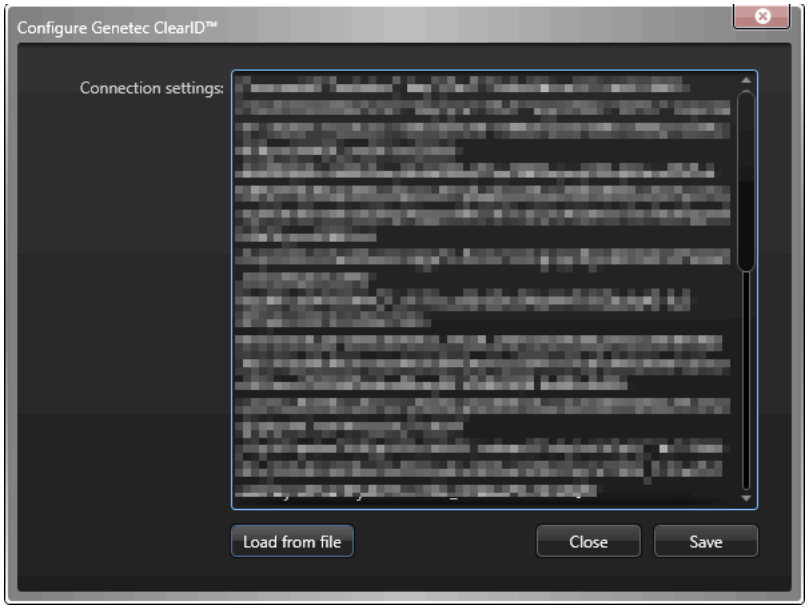
- Verify the identities attributes values that you want to import before synchronizing.
- Download a service authentication key.
- Check your license information: Part number CD-IDSYNC-SERVICE-1Y is required for One Identity Synchronization Tool import.

What you should know

Procedure

1 Open the One Identity Synchronization Tool (*OneIdentityConfigurationTool.exe*) and configure your settings.

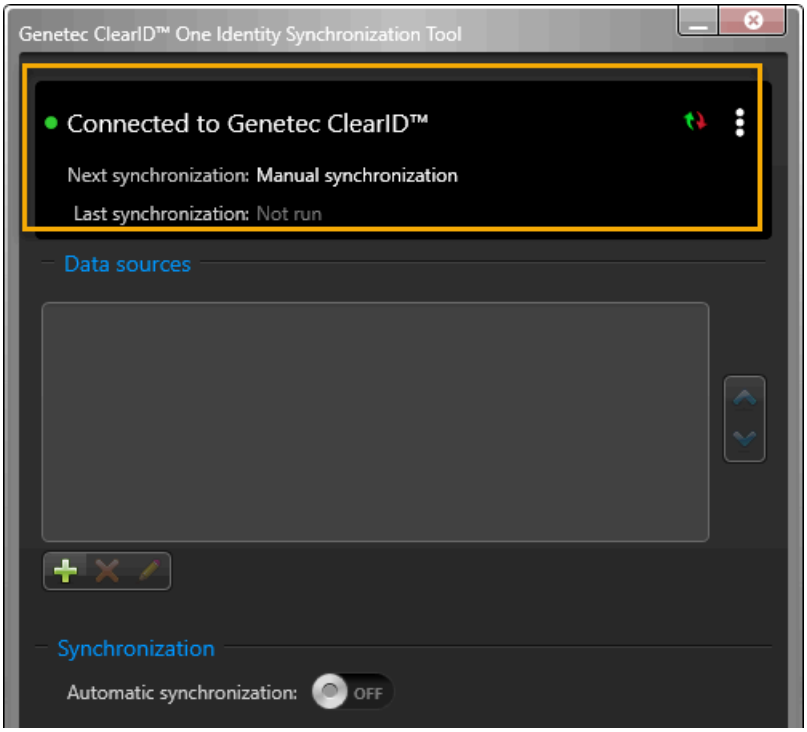
2 Configure your connection settings.
   a) In the One Identity Synchronization Tool, click **Configure**.
   b) In the *Configure Genetec ClearID™* dialog, click **Load from file**.
   c) Navigate to and select your authentication key.



3 Click **Save**.

   NOTE: The One Identity service is automatically restarted when the connection settings for the authentication key are changed.

Your One Identity Synchronization Tool is now connected to ClearID.



After you finish

Configure your data sources. Choose one of the following:

- Configuring the data source for Azure AD synchronization on page 522
- Configuring the data source for Database synchronization on page 530
- Configuring the data source for File synchronization on page 539

Configuring the data source for Azure AD synchronization

Before you can synchronize an external system with Genetec ClearID™, you must first configure the Genetec ClearID™ One Identity Synchronization Tool data sources for Azure Active Directory synchronization.

Before you begin

- Familiarize yourself with the One Identity attribute fields.
- Familiarize yourself with the Azure web app.
  - Make a note of the Azure web app connection settings for later use.
  - Make sure that the Azure AD API permissions are set up.
- Prepare an Azure Active Directory containing the identities attributes that you want to import and synchronize.
- Check your license information: Part number CD-IDSYNC-SERVICE-1Y is required for One Identity Synchronization Tool import.

What you should know

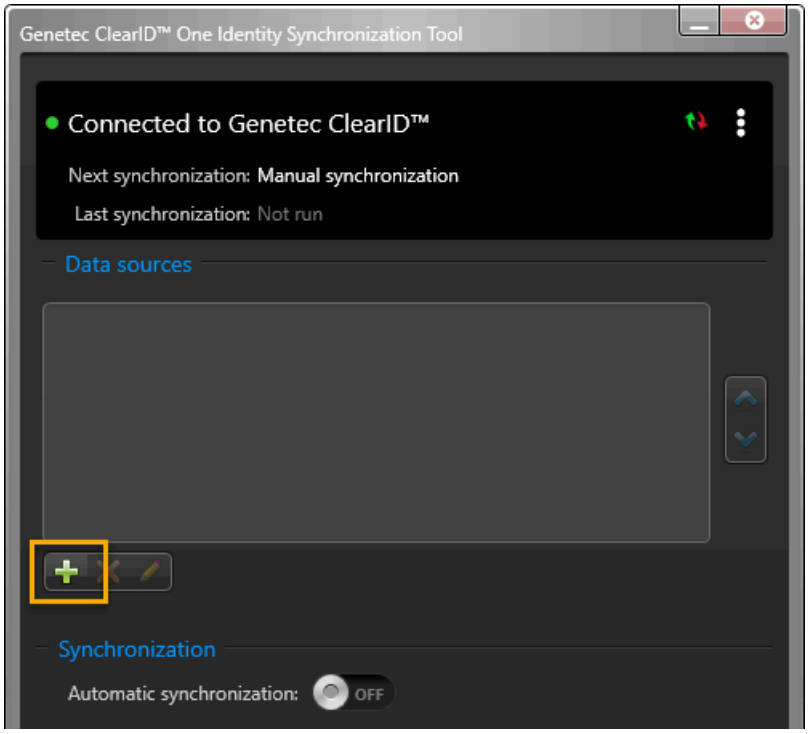
This procedure is for IT or security personnel responsible for external system attributes administration.

This procedure describes how to configure the data source for **Azure AD**.

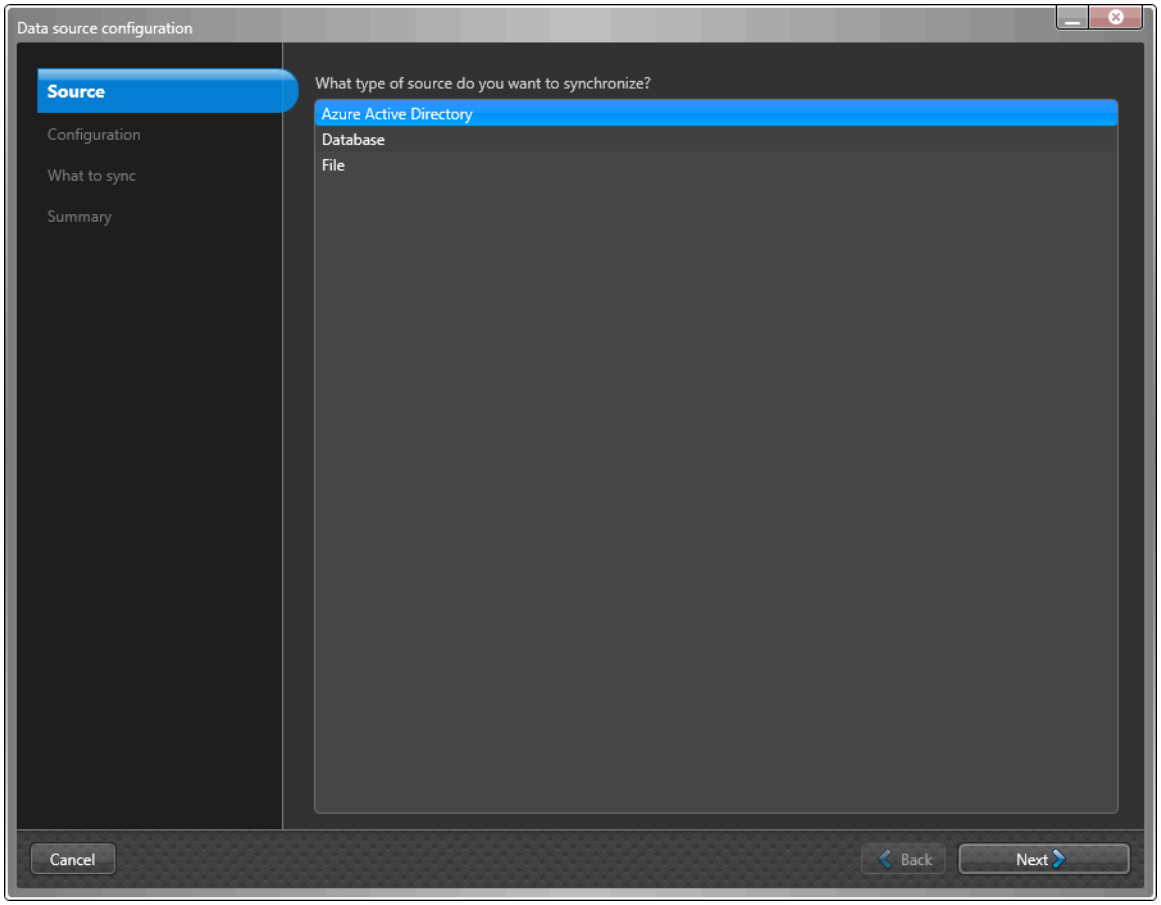
- The data source order is important because the first data source always overrides common fields.
- There is no limit to the number of data sources. However, the larger the data source, the memory requirements increase.
- When using an Azure data source to synchronize identities, the only possible field for **Unique ID** is the **UserId** field. When the Azure data source is selected, the **Unique ID** fields cannot be configured and use of the Azure **UserId** field is triggered by default.

Procedure

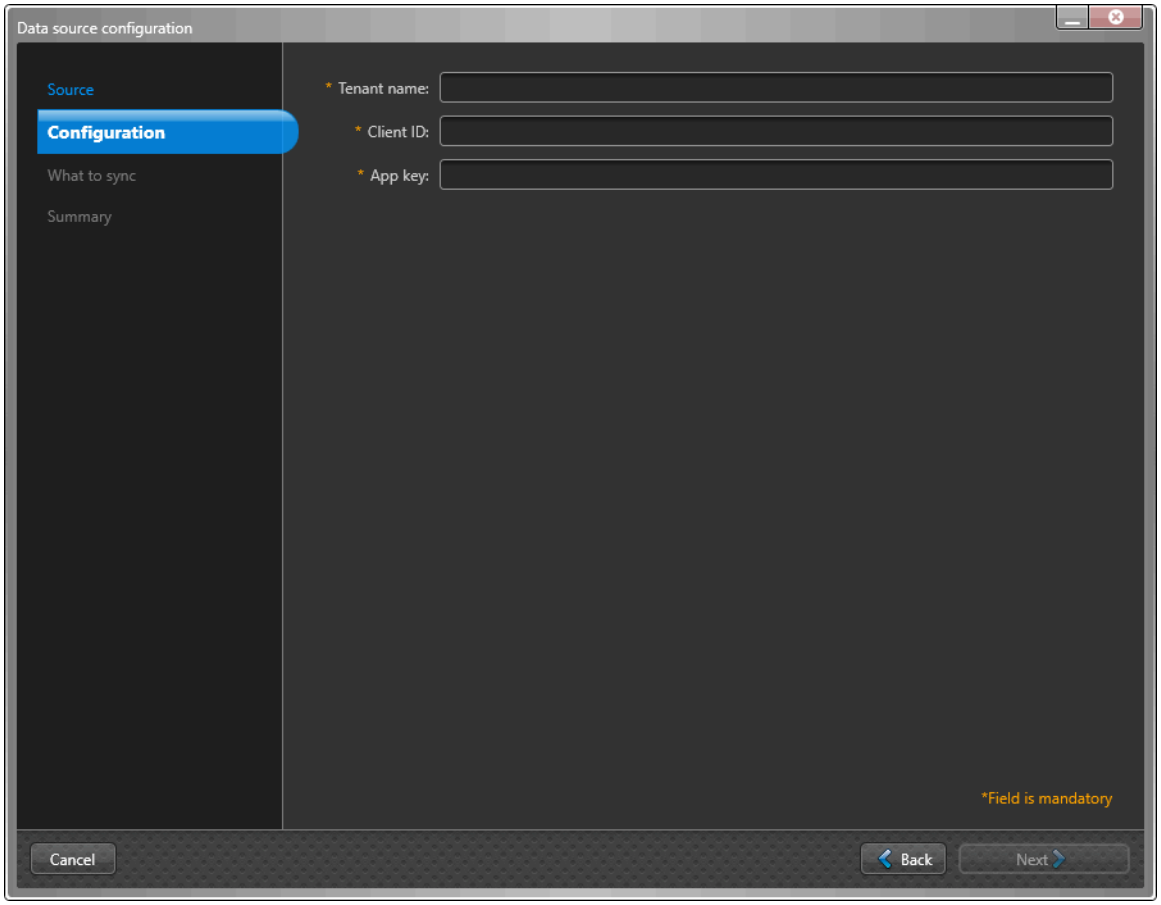
1 In the One Identity Synchronization Tool *Data sources* section, click **Add data source** ( ).



2 In the *Source* section of the *Data source configuration* dialog, select **Azure Active Directory** and click **Next**.



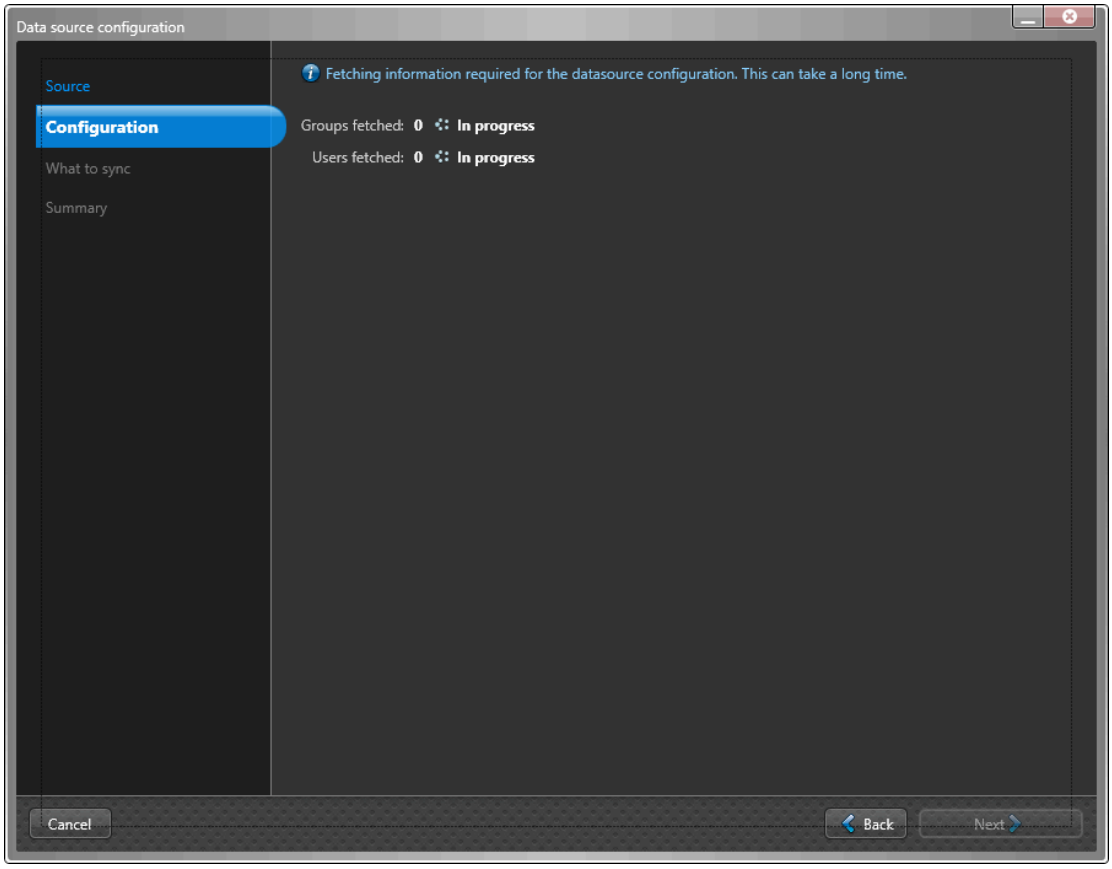
3 In the *Configuration* section of the *Data source configuration* dialog, complete the following mandatory fields:



- **Tenant name:** In the **Tenant name** field, enter your tenant name (account name). The tenant name is used to connect to the directory for the account. For example, a host address *account.onmicrosoft.com* or a GUID nxxnxnxx-nnnn-nxnn-nnnx-nxnnnxnnxnnn.
- **Client ID:** In the **Client ID** field, enter your client ID. The client ID is used to connect to the client application. The **Client ID** format is an alpha-numeric format as follows: nxnxnxxn-xxnn-nnnx-xxnn-nxxxnxnnnxnn.
- **App key:** In the **App key** field, enter your App key. The App key is used to authenticate communications with ClearID. The **App key** format is an alpha-numeric format as follows: nXnxxxxXxxXnxxxXXXxXXnxxXXXnnxxxXXnXXXXXxxx=.

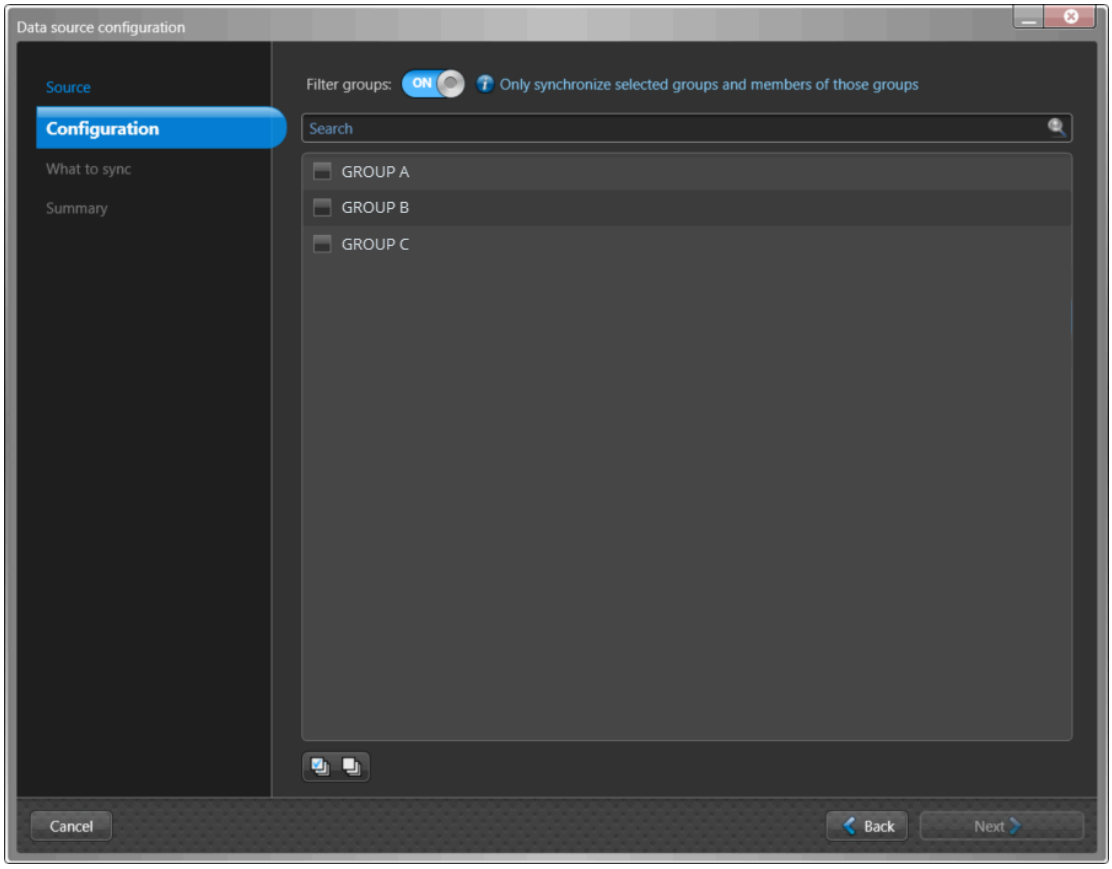
TIP: The Tenant name, Client ID, and App key can be obtained from your Azure Active Directory application registration.

a) Click **Next**.



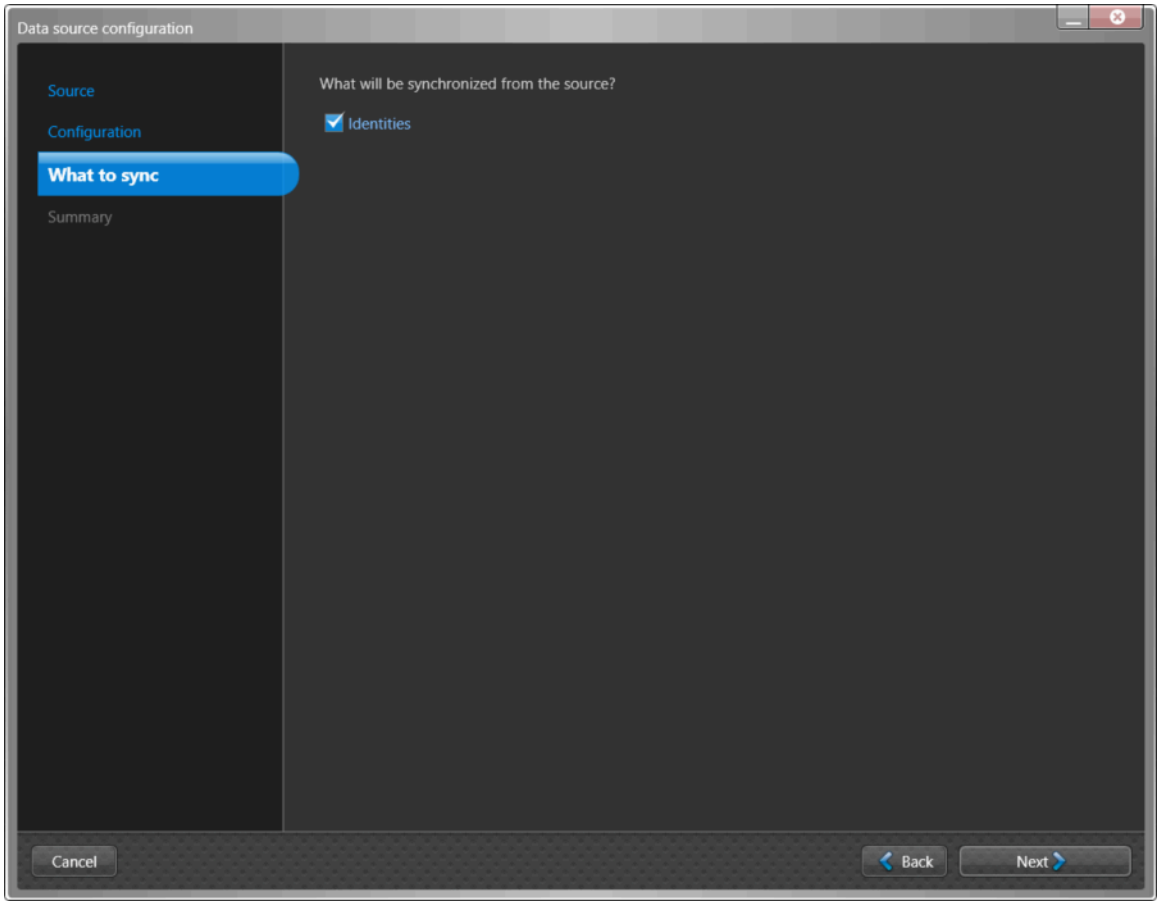
NOTE: Fetching information required for the data source configuration can take a long time and varies depending on the number of groups and users fetched.

b) (Optional) Use the **Filter groups** option to only synchronize a subset of selected Azure AD groups and group members. Search for or select the groups that you require and click **Next**.



NOTE: If your Azure AD list is long, you can also use the **Check all** or **Uncheck all** icon to help you during your selection process.

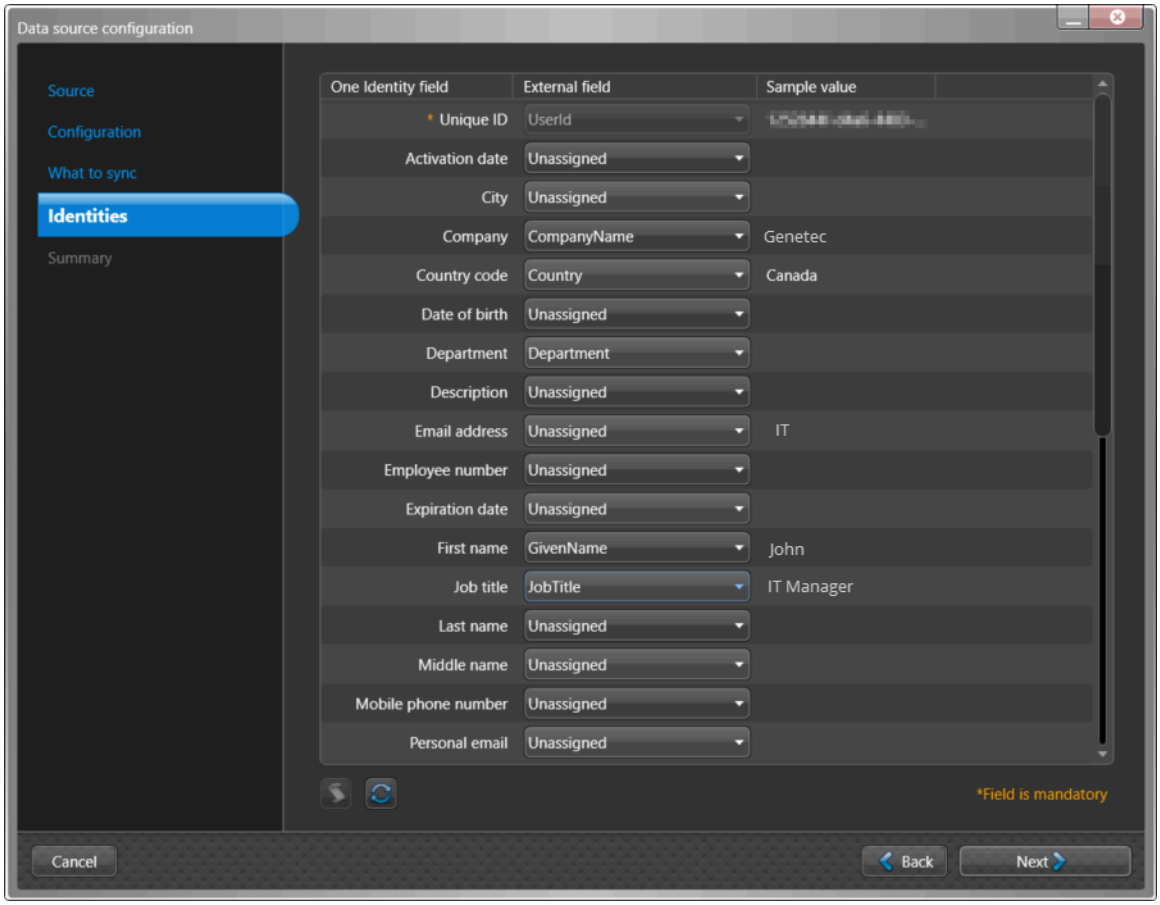
4 In the *What to sync* section of the *Data source configuration* dialog, select **Identities** to synchronize from the external system data source.



5 If you selected **Identities** as a data source, in the *What to sync* section, configure the identity attributes settings.

NOTE: The fields that are displayed in the *Identities* section vary depending on the data source you selected in the *Source* section.

The following image shows the options that are displayed after selecting an **Azure AD** data source.



a) Configure your **External field** attribute mappings.

- **One Identity field:** Displays the ClearID identity attributes. Mandatory fields are highlighted using an asterisk (*).
- **External Field:** Select system attributes in the **External field** columns that you want to map from the external system to the ClearID identity attributes shown in the **One Identity field** column.

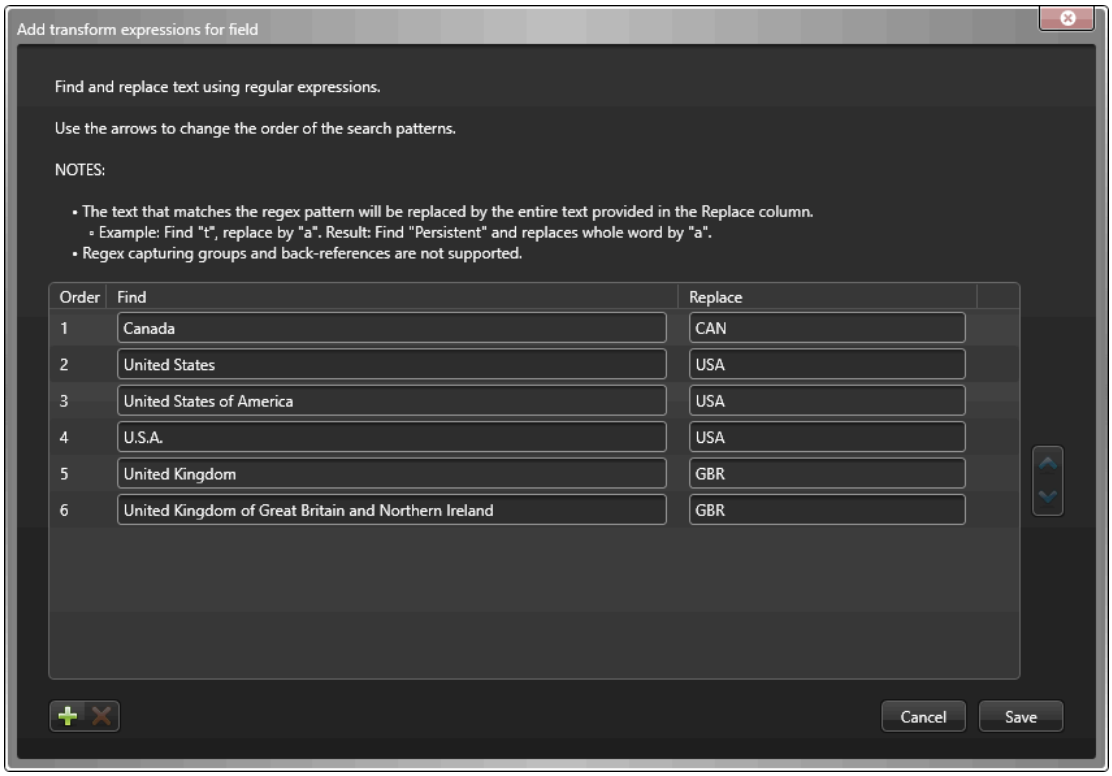
CAUTION: When using **Azure AD** as your data source, the One Identity **Unique ID** field must be mapped to the Azure AD **User ID** external field to ensure that the identity attributes are correctly mapped and synchronized.

- **Sample value:** If an **External field** is selected, an example of the selected external field data from your data source is displayed (if available) in the **Sample value** column next to the **External field** column.

TIP: Use the sample value column to check the format of the attributes data you are about to import from your external system fields into ClearID.

b) (Optional) Click **Script** ( ) to add a transform expression to find and replace external field text using regular expressions.

For example, you can look for variations of a country name to replace with the correct country code.



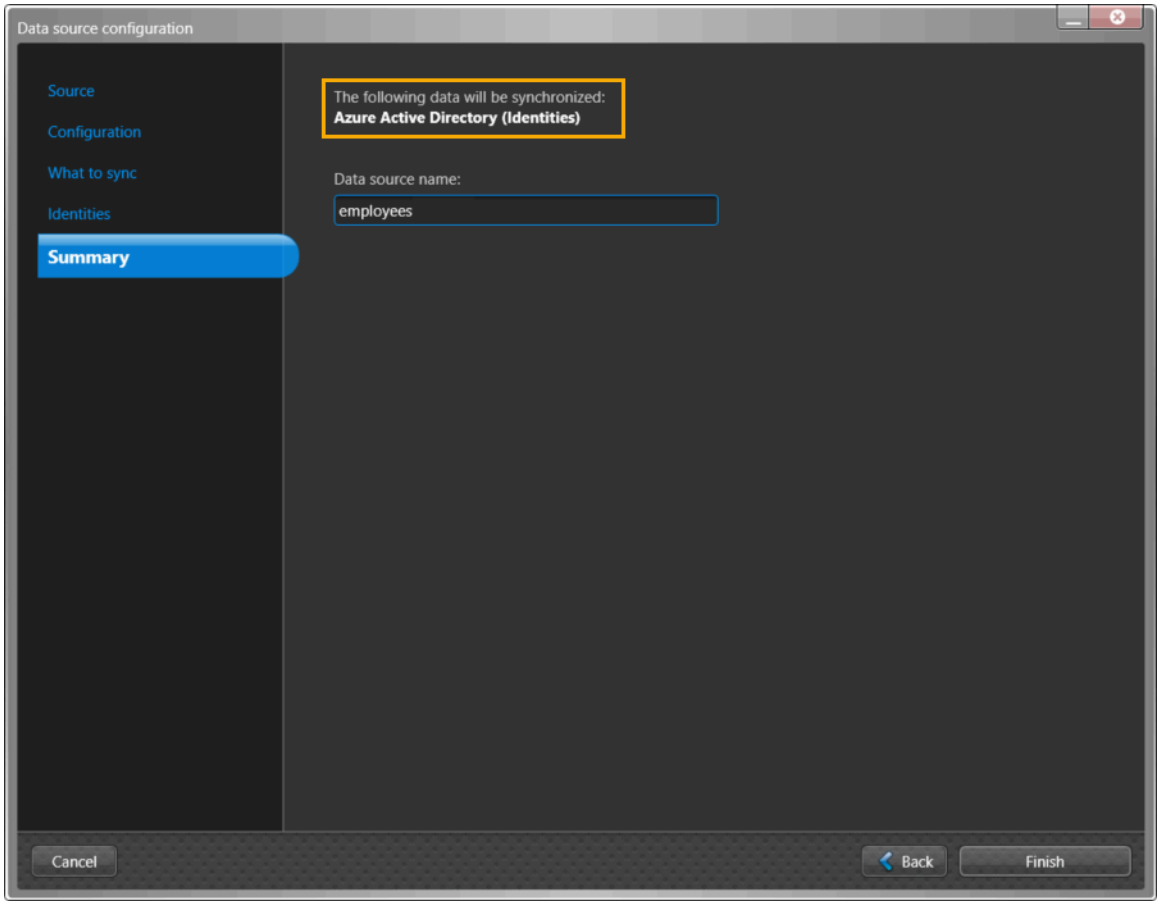
- A script icon ( ) is shown in the **Sample value** column when the field text is being replaced with a regular expression.
- The transform expressions are processed in the order specified in the *Add transform expressions for field* dialog.

TIP: If required, you can select the row of any expressions that you no longer require, and click **delete** .

c) (Optional) Click **Refresh** ( ) to update the external fields data from your data source. This refresh option is used in situations where the existing data has been modified, new data rows have been added, or new attribute columns have been added.

d) Click **Next**.

6 In the *Summary* section, review the data that will be synchronized.



NOTE: If multiple data sources are selected, only the first data source file is displayed in the *Summary* section **Data source name** field. If you want each of the data files listed in the **Data sources** section, you must add them individually.

a) If the data synchronization details look correct, click **Finish**.

After you finish

Configure your synchronization settings.

Related Topics

About One Identity Synchronization Tool attribute fields on page 506

Configuring the data source for Database synchronization

Before you can synchronize an external system with Genetec ClearID™, you must first configure the Genetec ClearID™ One Identity Synchronization Tool data sources for database synchronization.

Before you begin

- Familiarize yourself with the One Identity attribute fields.
- Prepare a Database containing identities attributes that you want to import and synchronize.
- Check your license information: Part number CD-IDSYNC-SERVICE-1Y is required for One Identity Synchronization Tool import.

What you should know

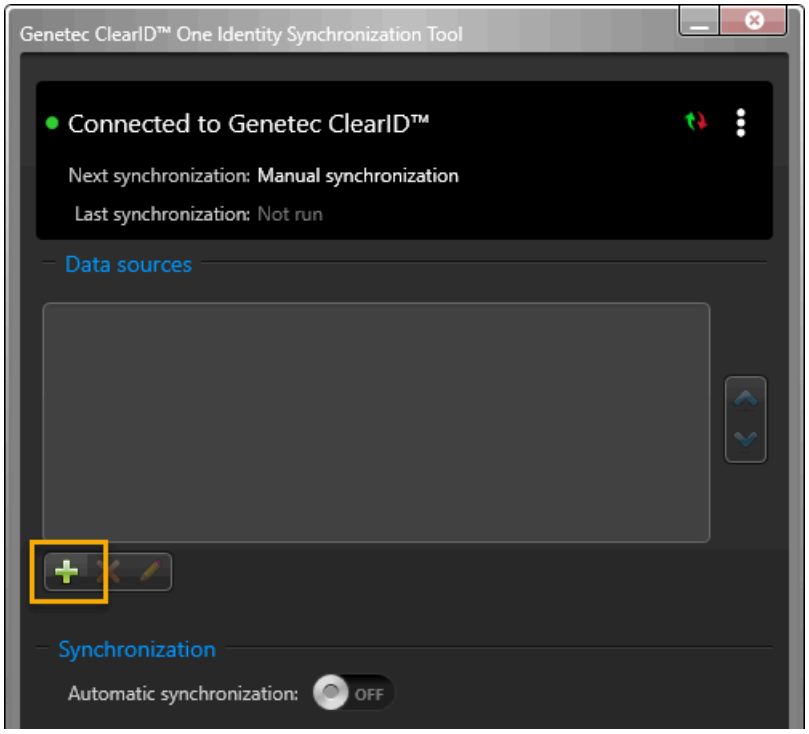
This procedure is for IT or security personnel responsible for external system attributes administration.

This procedure describes how to configure the data source for a **Database** (Microsoft SQL Server, Oracle Database, ODBC).

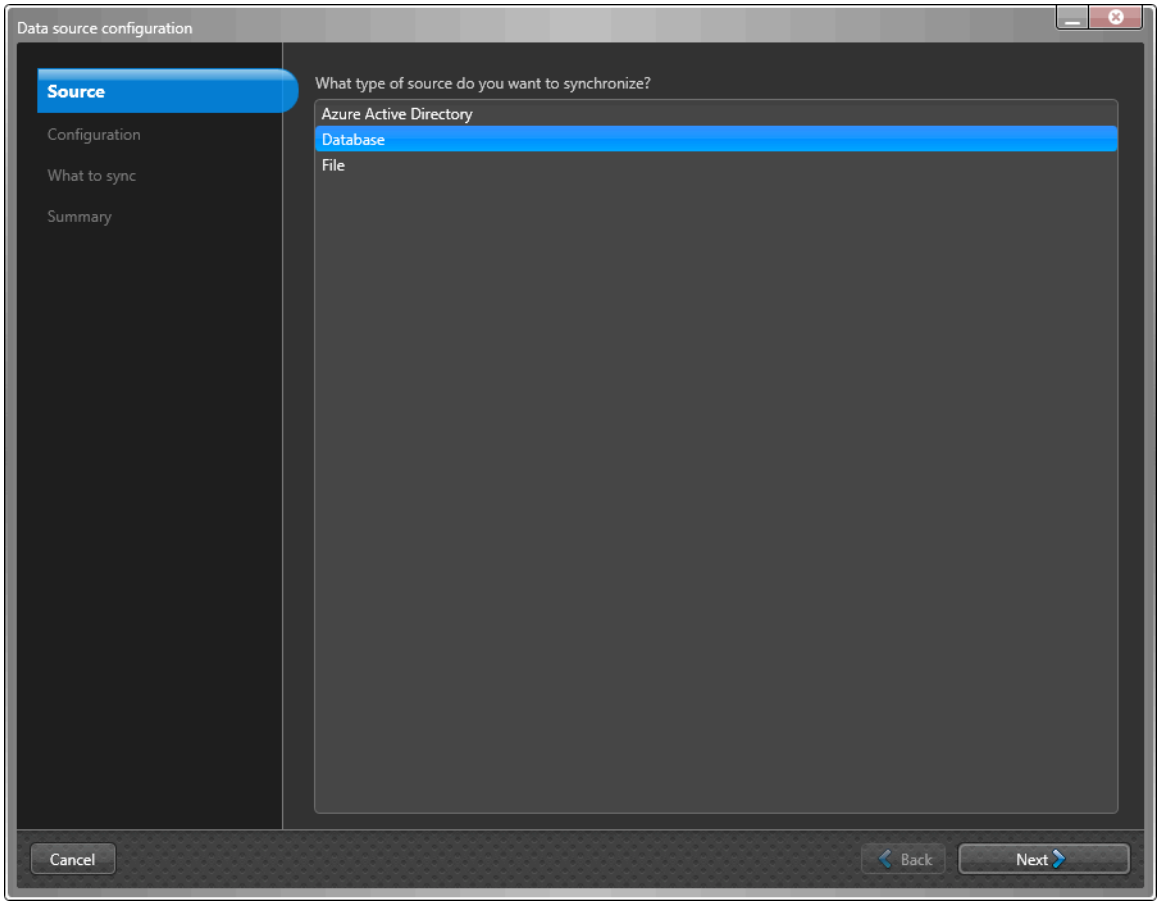
- The data source order is important because the first data source always overrides common fields.
- There is no limit to the number of data sources. However, the larger the data source, the memory requirements increase.

Procedure

1 In the One Identity Synchronization Tool *Data sources* section, click **Add data source** ( ).



2 In the *Source* section of the *Data source configuration* dialog, select **Database** and click **Next**.

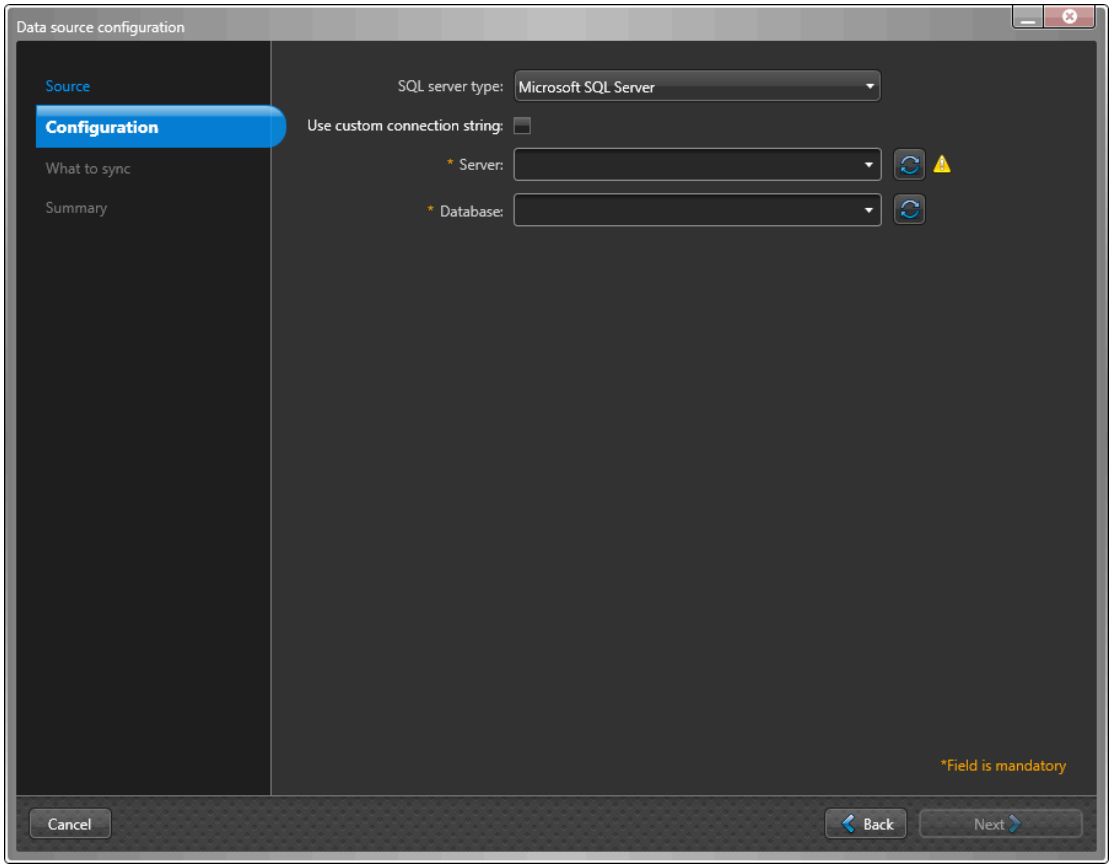


3 In the *Configuration* section of the *Data source configuration* dialog, configure the database settings.

a) Select an SQL server type:

- Microsoft SQL Server
- Oracle Database (only views are currently supported)
- ODBC

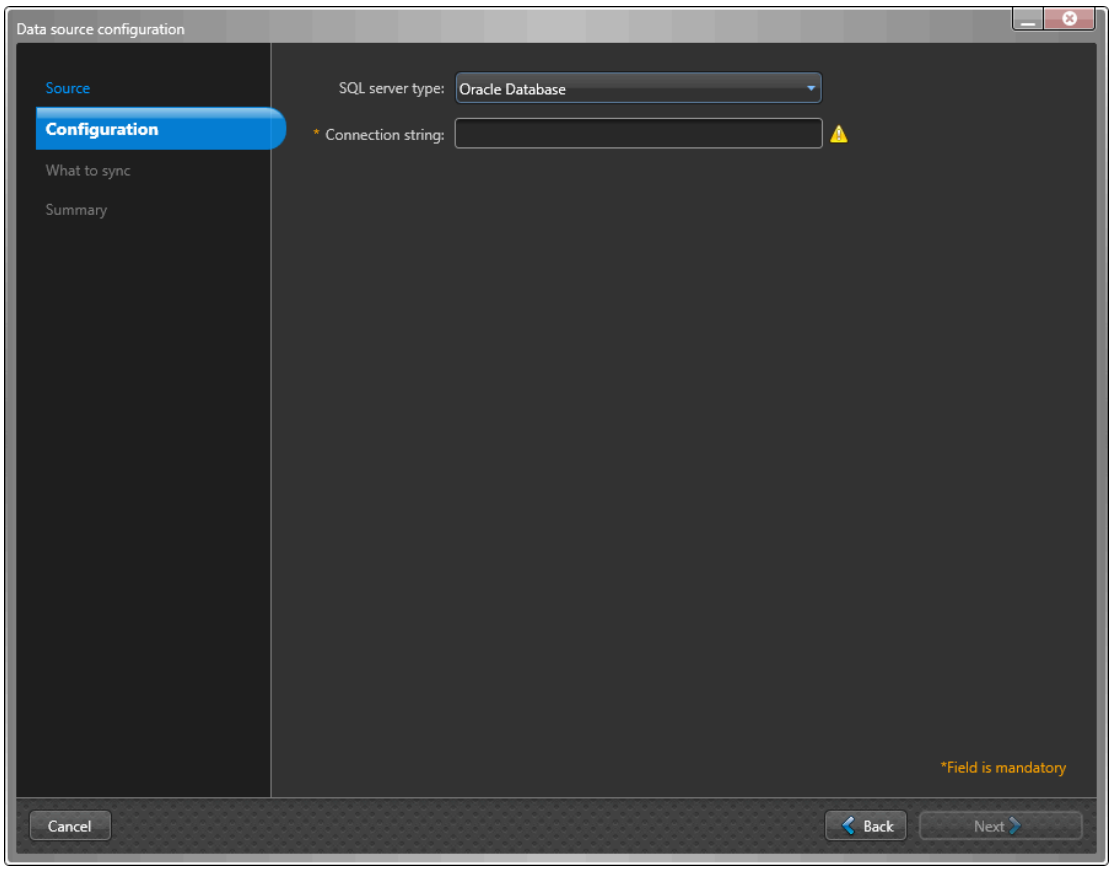
b) If you selected **Microsoft SQL Server**, configure the following:



- **Use custom connection string:** Select the checkbox if you want to use a custom connection string.
  NOTE: If you use the **Use custom connection string** option, the **Server** and **Database** fields are removed.

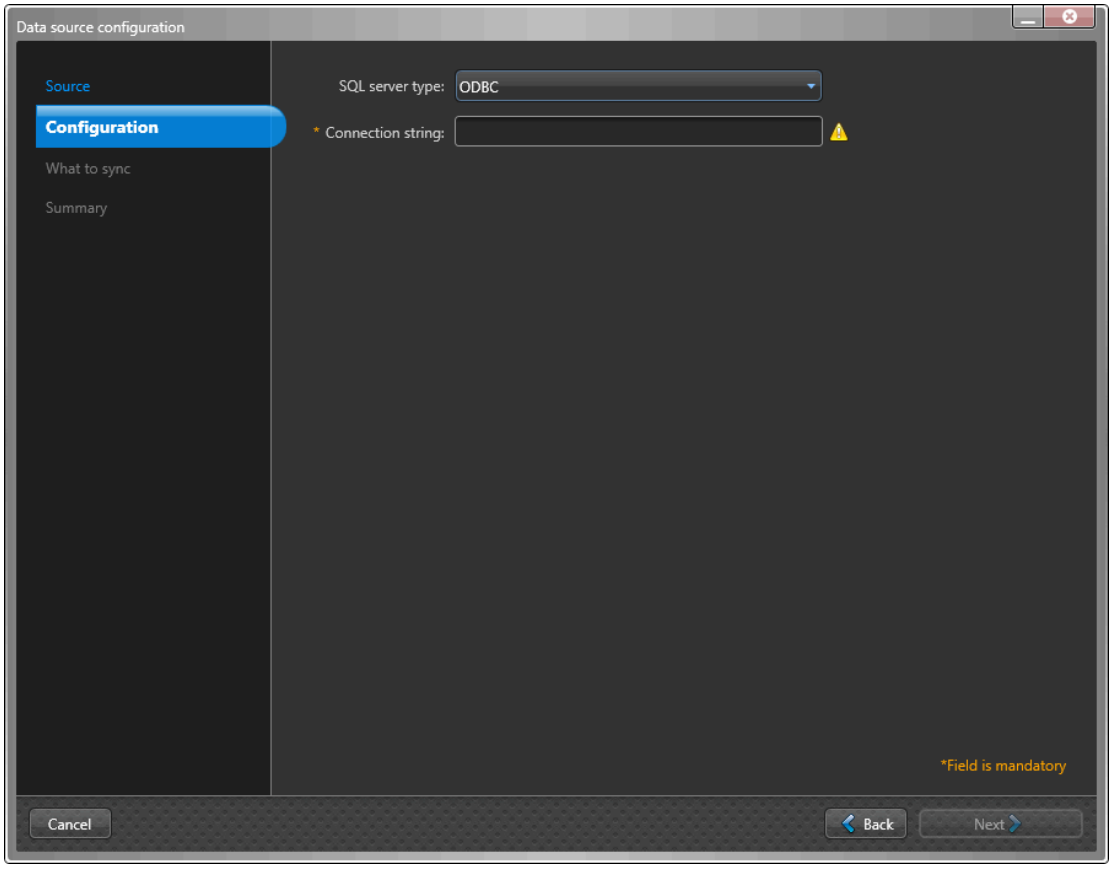
- **Connection string:** Enter the connection string.
- **Server:** Enter SQL server information or select a server from the list.
- **Database:** Enter Database information or select a database from the list.

c) If you selected **Oracle Database**, configure the following:



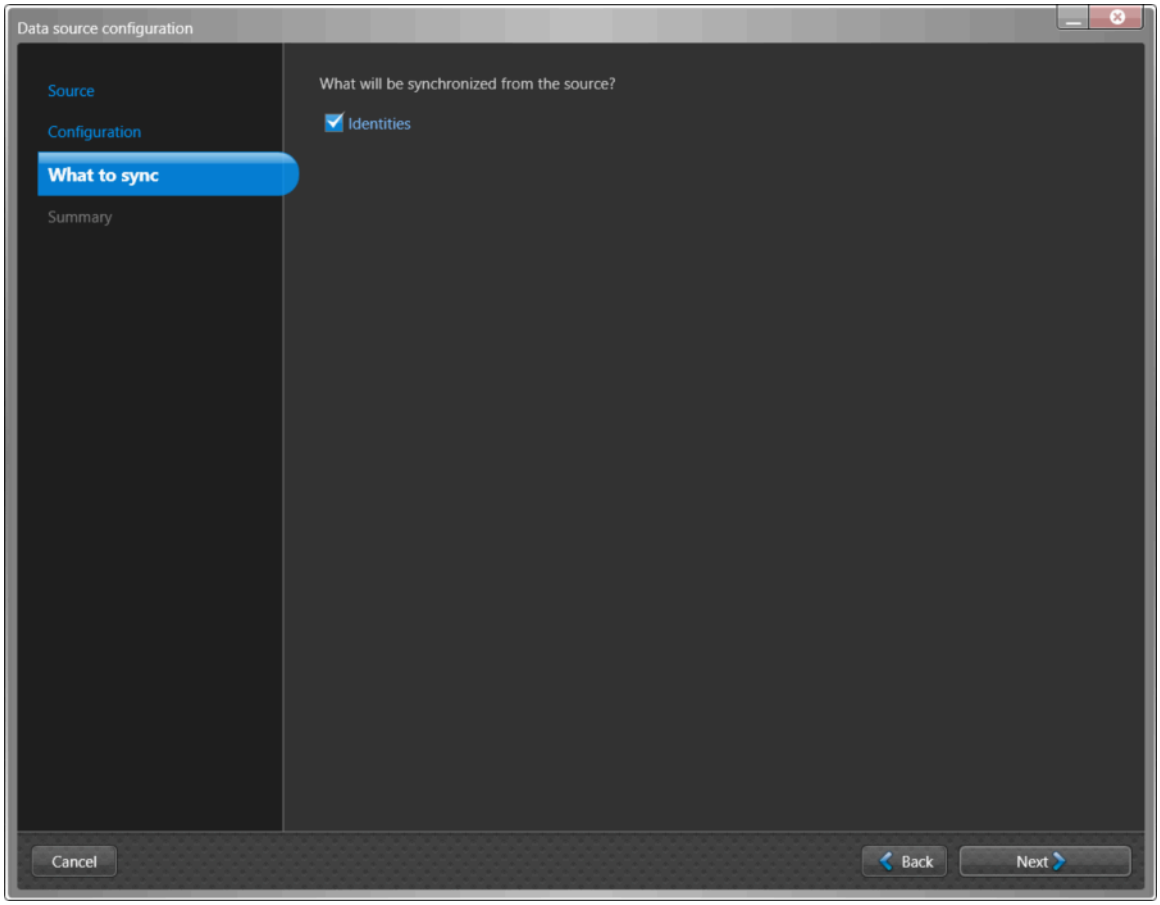
- **Connection string:** Enter the connection string.

d) If you selected **ODBC**, configure the following:



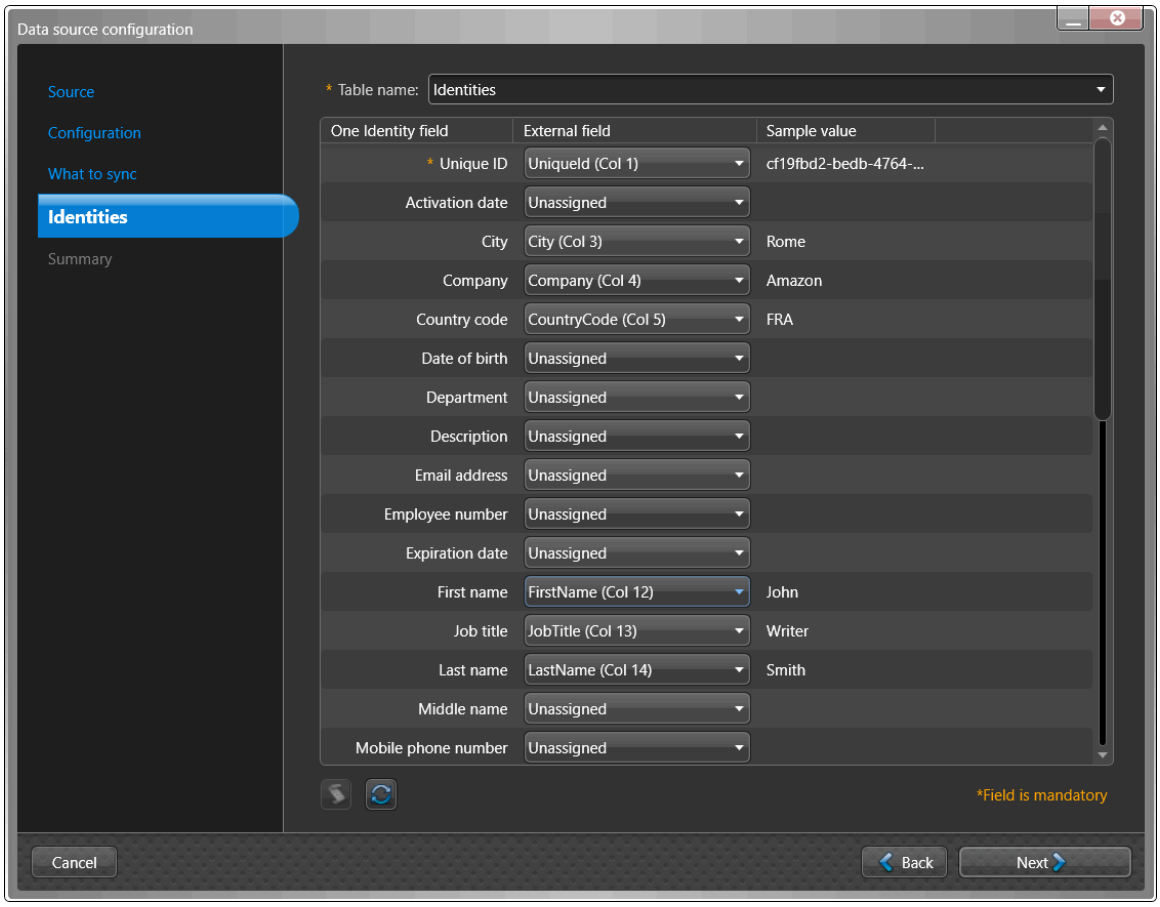
- **Connection string:** Enter the connection string.

4 In the *What to sync* section of the *Data source configuration* dialog, select **Identities** to synchronize from the external system data source.



5 If you selected **Identities** as a data source, in the *What to sync* section, configure the identity attributes settings.

NOTE: The fields that are displayed vary depending on the data source you selected in the *Source* section. The following image shows the options that are displayed after selecting a **Database** data source.



a) Configure your **External field** attribute mappings.

- **One Identity field:** Displays the ClearID identity attributes. Mandatory fields are highlighted using an asterisk (*).

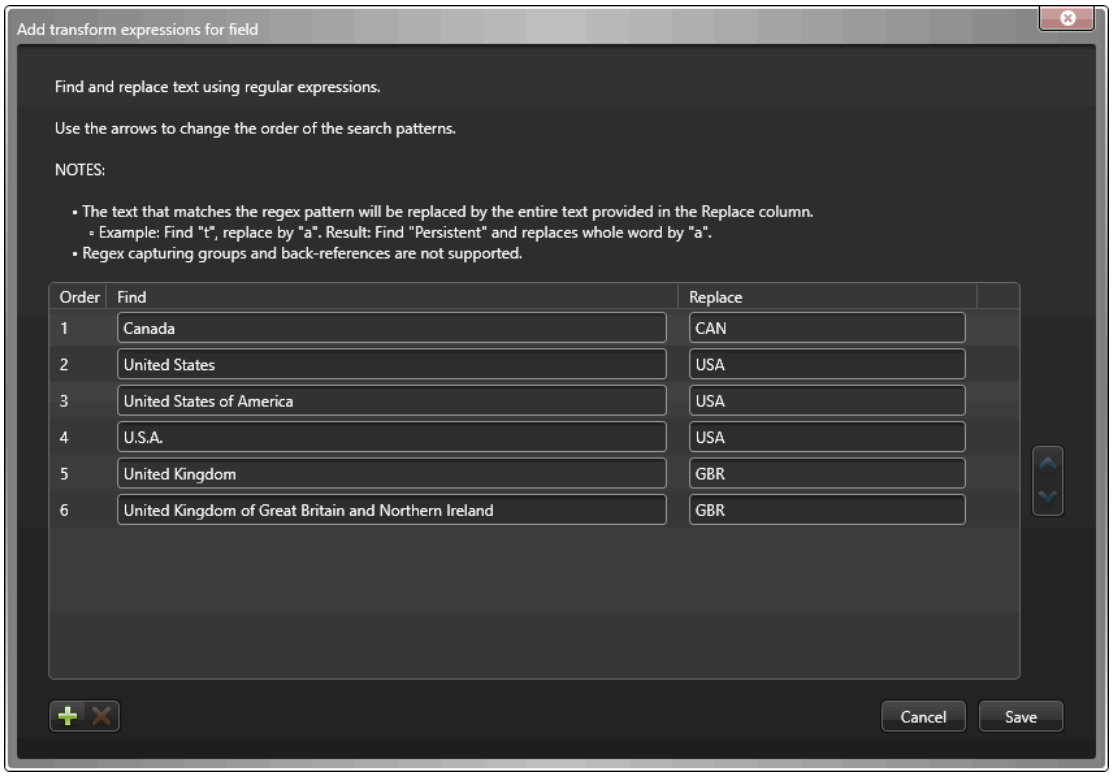
IMPORTANT: The Unique ID is used internally by One Identity as the primary key to identify what it is. For example, an employee number or email address could be used, as long as it is unique.

- **External Field:** Select system attributes in the **External field** columns that you want to map from the external system to the ClearID identity attributes shown in the **One Identity field** column.
- **Sample value:** If an **External field** is selected, an example of the selected external field data from your data source is displayed (if available) in the **Sample value** column next to the **External field** column.

TIP: Use the sample value column to check the format of the attributes data you are about to import from your external system fields into ClearID.

b) (Optional) Click **Script** ( ) to add a transform expression to find and replace external field text using regular expressions.

For example, you can look for variations of a country name to replace with the correct country code.



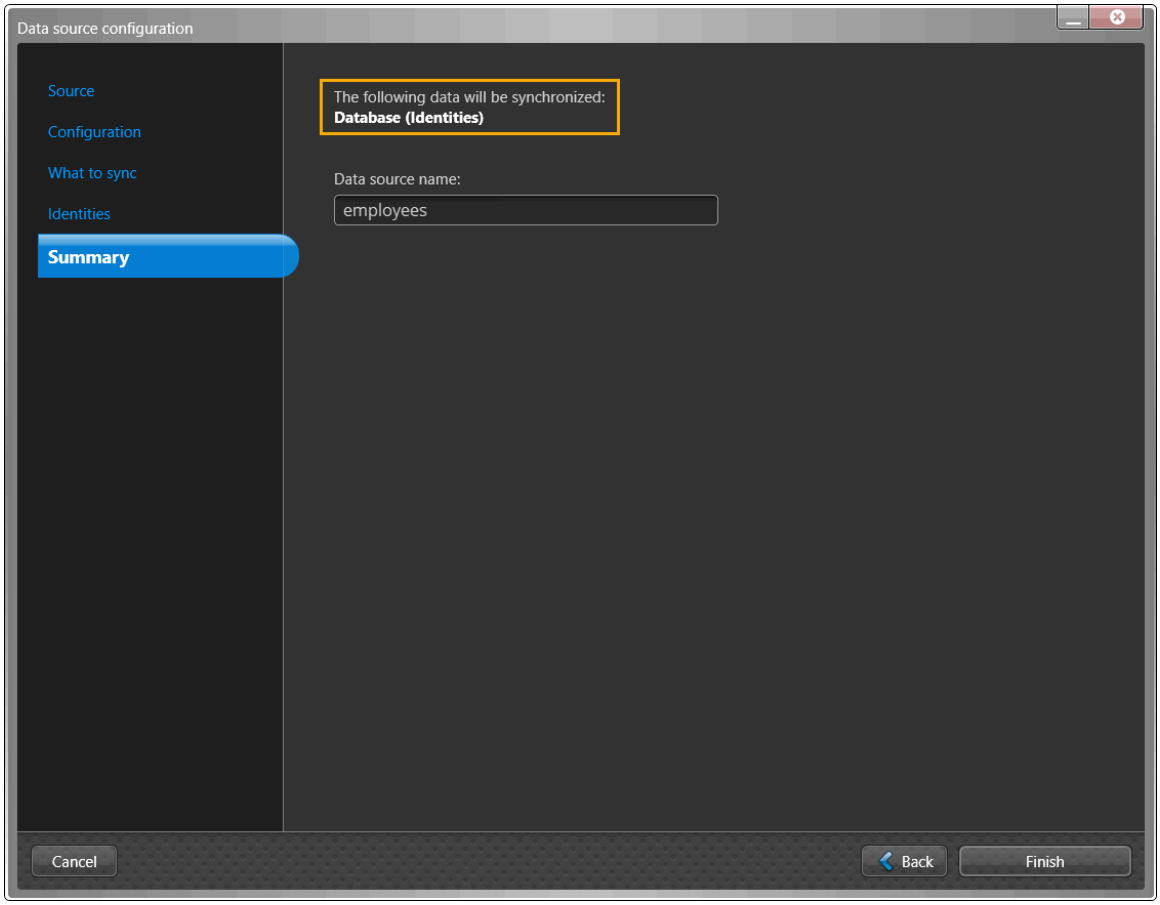
- A script icon ( ) is shown in the **Sample value** column when the field text is being replaced with a regular expression.
- The transform expressions are processed in the order specified in the *Add transform expressions for field* dialog.

TIP: If required, you can select the row of any expressions that you no longer require, and click **delete** .

c) (Optional) Click **Refresh** ( ) to update the external fields data from your data source. This refresh option is used in situations where the existing data has been modified, new data rows have been added, or new attribute columns have been added.

d) Click **Next**.

6 In the *Summary* section, review the data that will be synchronized.



NOTE: If multiple data sources are selected, only the first data source file is displayed in the *Summary* section **Data source name** field. If you want each of the data files listed in the **Data sources** section, you must add them individually.

a) If the data synchronization details look correct, click **Finish**.

After you finish

Configure your synchronization settings.

Related Topics

About One Identity Synchronization Tool attribute fields on page 506

Configuring the data source for File synchronization

Before you can synchronize an external system with Genetec ClearID™, you must first configure the Genetec ClearID™ One Identity Synchronization Tool data sources for file (CSV) Synchronization.

Before you begin

- Familiarize yourself with the One Identity attribute fields.
- Prepare a CSV file containing the identities attributes that you want to import and synchronize.
- Check your license information: Part number CD-IDSYNC-SERVICE-1Y is required for One Identity Synchronization Tool import.

IMPORTANT: Make sure that your CSV files are not being edited and are closed, because the synchronization tool locks the files during the synchronization process.

What you should know

This procedure is for IT or security personnel responsible for external system attributes administration.

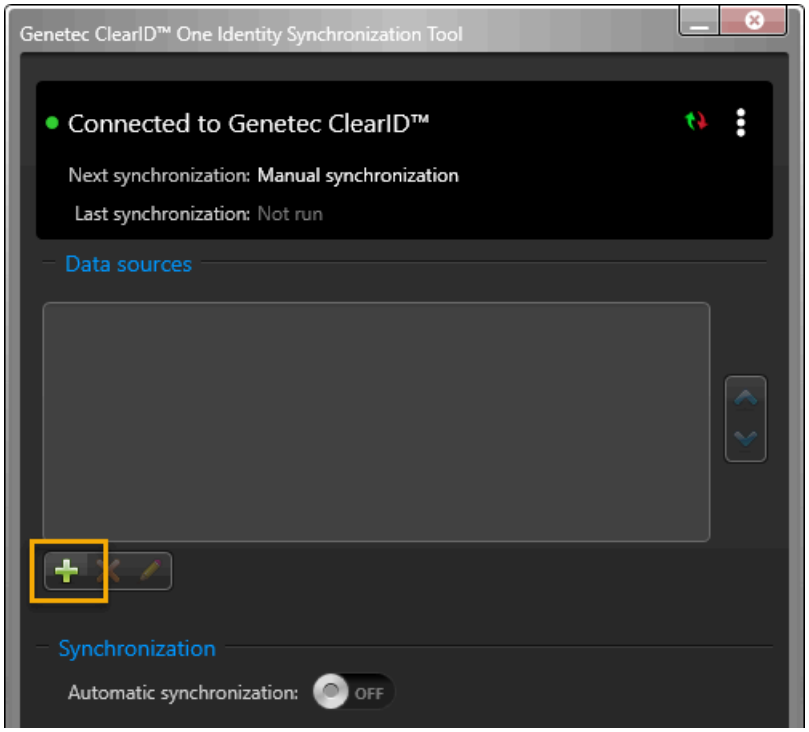
This procedure describes how to configure the data source for a **File** (CSV import).

- The data source order is important because the first data source always overrides common fields.
- One data source can include multiple CSV files containing identities.
- There is no limit to the number of data sources. However, the larger the data source (not only CSV files), the memory requirements increase.

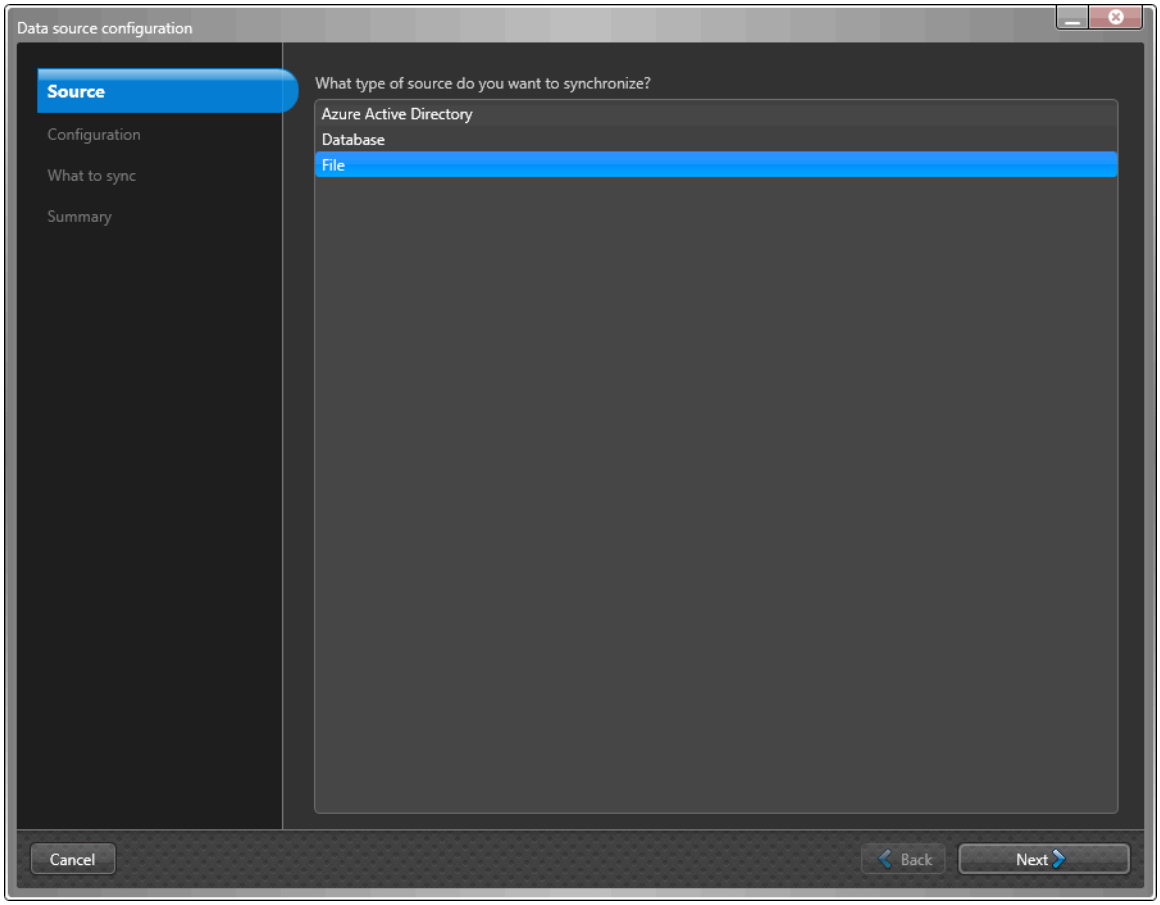
BEST PRACTICE: To avoid user permission issues when using CSV files with the ClearID One Identity Synchronization Tool, save them to a *C:* or *C:\temp* folder location. Do not save CSV files in a user-controlled file or folder locations (*C:\Users* folders or *desktop* folder location) or you might encounter File path is not valid user permissions issues.

Procedure

1 In the One Identity Synchronization Tool *Data sources* section, click **Add data source** ( ).

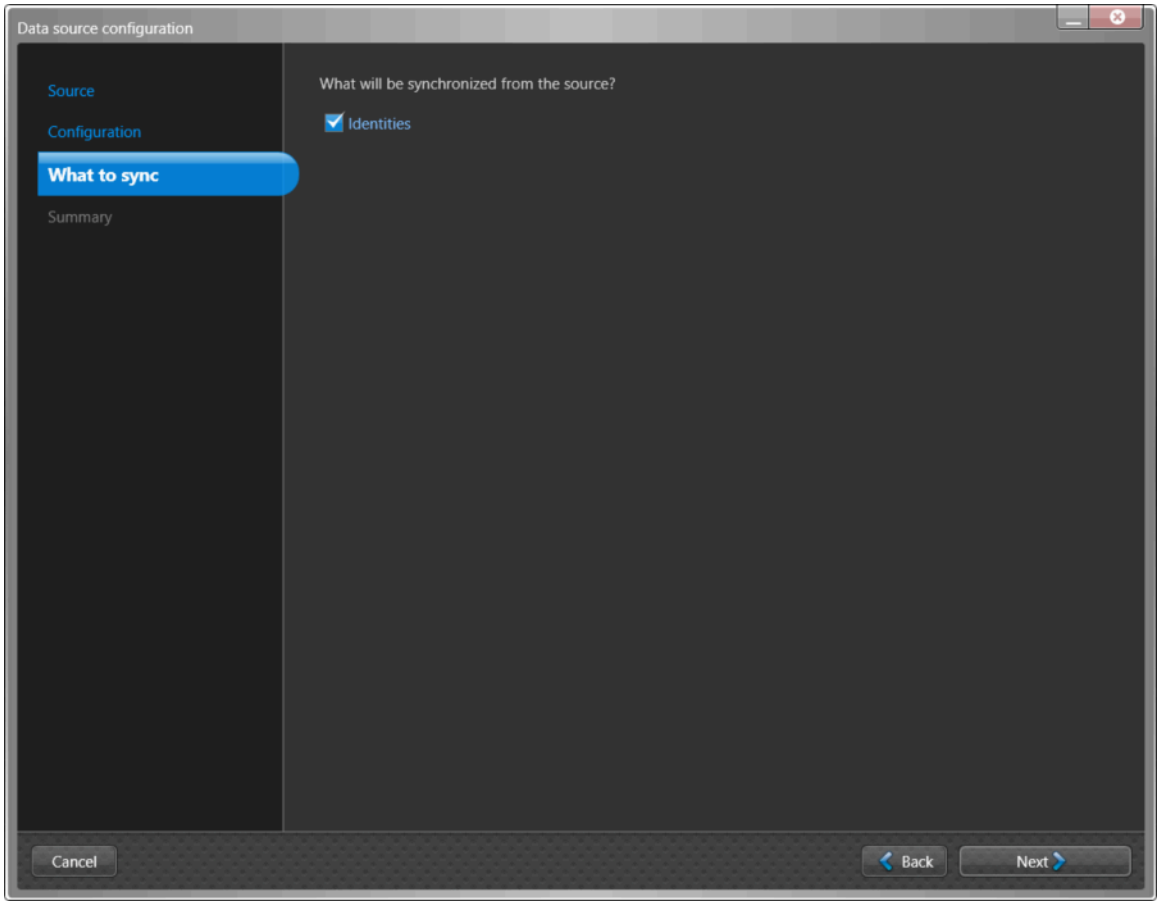


2 In the *Source* section of the *Data source configuration* dialog, select **File** and click **Next**.



NOTE: If you selected **File** in the *Source* section, the *Configuration* section of the *Data source configuration* dialog is skipped because it is not required.

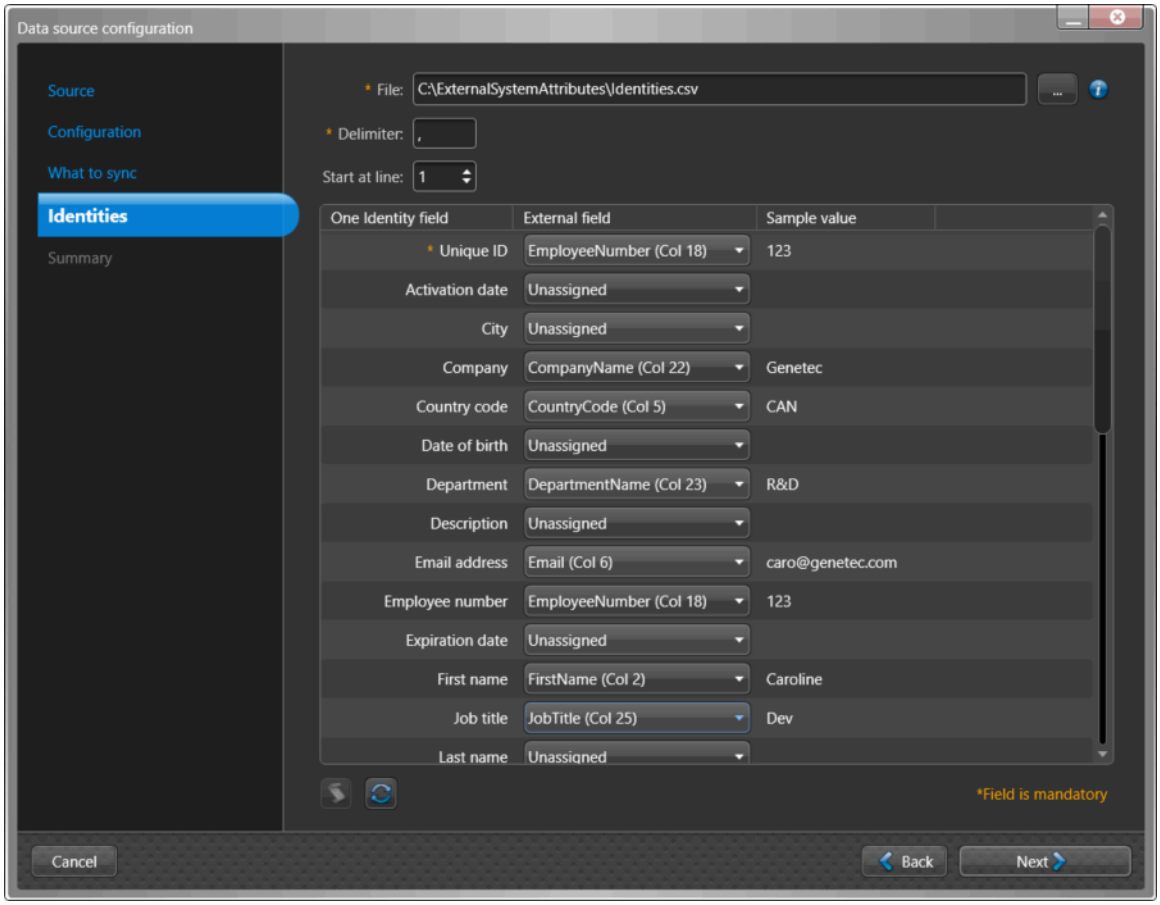
3 In the *What to sync* section of the *Data source configuration* dialog, select **Identities** to synchronize from the external system data source.



4 If you selected **Identities** as a data source, in the *What to sync* section, configure the identity attributes settings.

NOTE: The fields that are displayed vary depending on the data source selected in the *Source* section (step 2 on page 541) earlier.

The following image shows the options that are displayed after selecting a **File** (CSV) data source.



a) If you selected **File** as your data source, configure the file settings.

- **File:** Click **More** ( ) to select the CSV file containing your attributes.

  NOTE: The file path must exist on the server where the One Identity Configuration Tool is installed.
- **Delimiter:** Enter a **Delimiter value**.

  For example, for a CSV file it is a comma-separated value (CSV).
- **Start at line:** Select a **Start at line**.

For example, the data in a table with no headings might start at line 0, whereas the data in a table with headings might start at line 1.

b) Configure your **External field** attribute mappings.

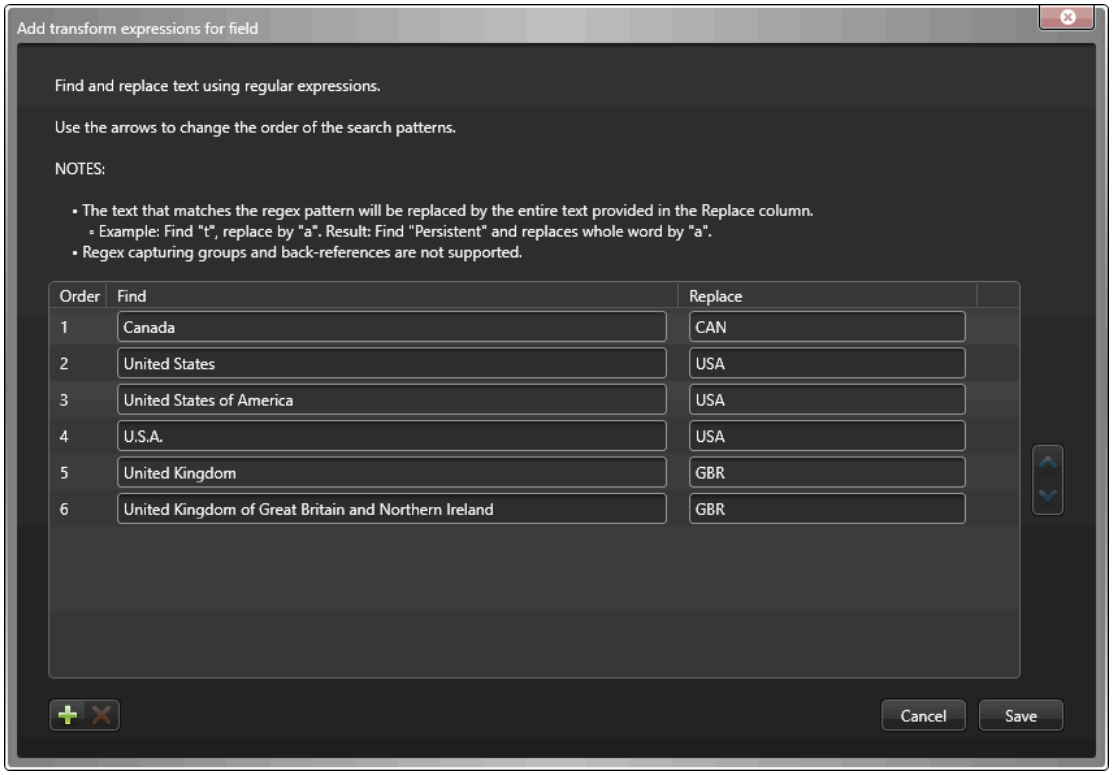
- **One Identity field:** Displays the ClearID identity attributes. Mandatory fields are highlighted using an asterisk (*).

IMPORTANT: The Unique ID is used internally by One Identity as the primary key to identify what it is. For example, an employee number or email address could be used, as long as it is unique.

- **External Field:** Select system attributes in the **External field** columns that you want to map from the external system to the ClearID identity attributes shown in the **One Identity field** column.
- • If your CSV file contains column titles, the names are displayed.
  - If your CSV file does not contain column titles, the column number is displayed.

c) (Optional) Click **Script** ( ) to add a transform expression to find and replace external field text using regular expressions.

For example, you can look for variations of a country name to replace with the correct country code.



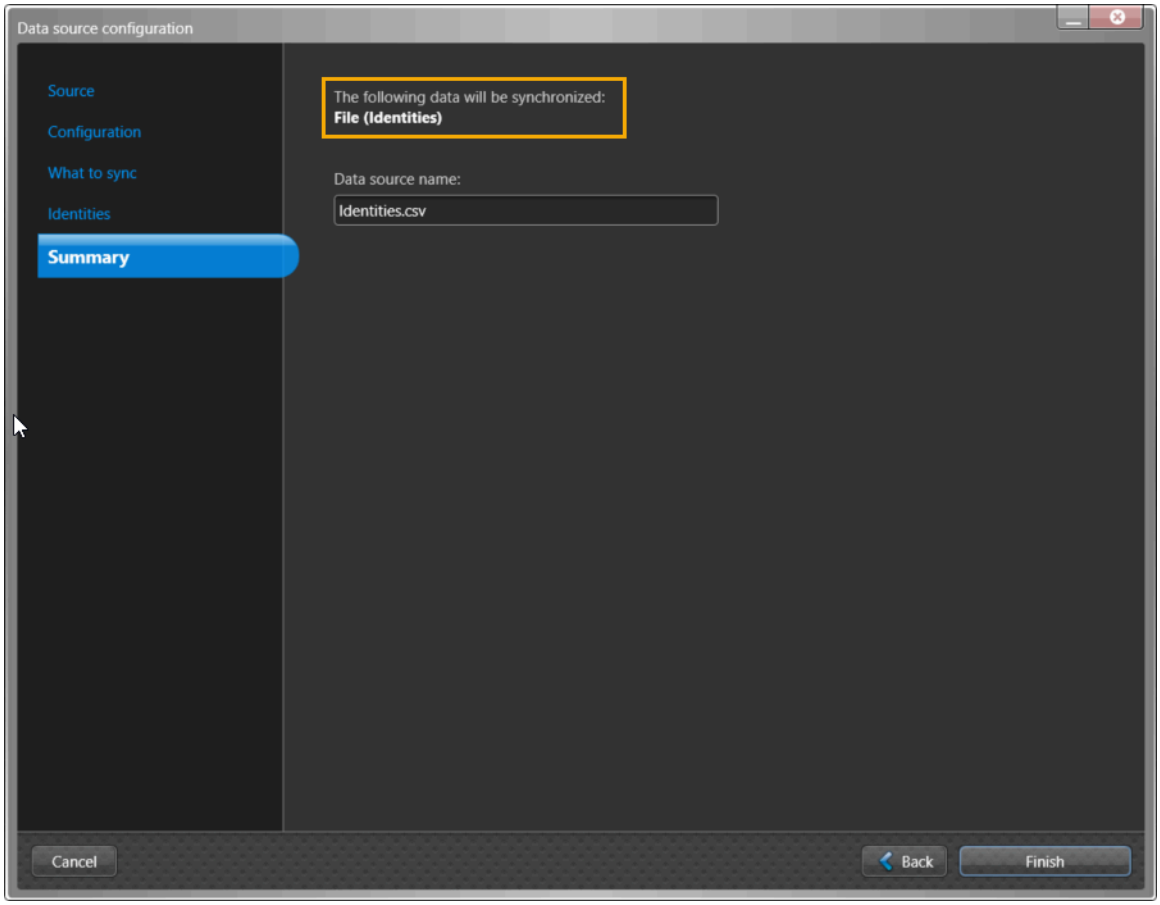
- A script icon ( ) is shown in the **Sample value** column when the field text is being replaced with a regular expression.
- The transform expressions are processed in the order specified in the *Add transform expressions for field* dialog.

TIP: If required, you can select the row of any expressions that you no longer require, and click **delete** .

d) (Optional) Click **Refresh** ( ) to update the external fields data from your data source. This refresh option is used in situations where the existing data has been modified, new data rows have been added, or new attribute columns have been added.

e) Click **Next**.

5 In the *Summary* section, review the data that will be synchronized.



NOTE: If multiple data sources are selected, only the first data source file is displayed in the *Summary* section **Data source name** field. If you want each of the data files listed in the **Data sources** section, you must add them individually.

a) If the data synchronization details look correct, click **Finish**.

After you finish

Configure your synchronization settings.

Related Topics

About One Identity Synchronization Tool attribute fields on page 506

Configuring synchronization settings

Before you can synchronize an external system with Genetec ClearID™, you must first configure the Genetec ClearID™ One Identity Synchronization Tool synchronization settings.

Before you begin

- Check your license information: Part number CD-IDSYNC-SERVICE-1Y is required for One Identity Synchronization Tool import.

IMPORTANT: Make sure that your files are not being edited and are closed, because the synchronization tool locks the file during the synchronization process.

What you should know

This procedure is for IT or security personnel responsible for external system attributes administration.

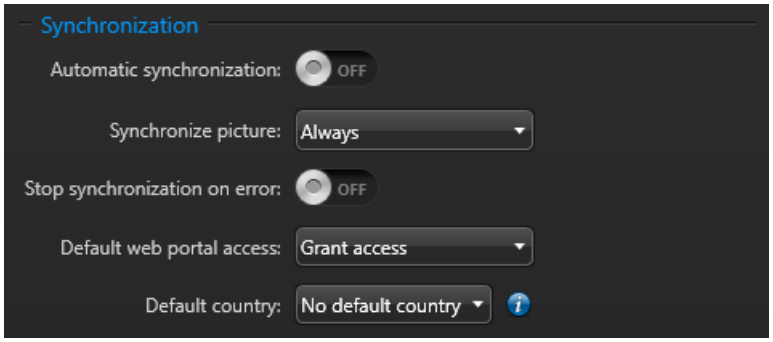
Synchronization can be performed manually using the **Synchronize now** ( ) option, or automatically at the **Automatic synchronization** intervals specified in the One Identity Synchronization Tool.

Synchronization of external system attributes into ClearID identity attributes is INBOUND only.

CAUTION: Any changes only made to identities in ClearID can be overwritten during the next synchronization from the external system.

Procedure

1 In the One Identity Synchronization Tool **Synchronization** section, configure your synchronization settings.



- **Automatic synchronization:** Enable automatic synchronization if you want attributes synchronized at a specified interval.
  - **Interval:** If automatic synchronization is enabled, choose a synchronization interval:
    - **Fixed:** Enter a Synchronization interval using the following format: `000d 01h 00m 00s`.
      For example, every 7 days would be `007d 00h 00m 00s`, or every 12hrs `000d 12h 00m 00s`.
    - **Cron Schedule:** Enter a synchronization interval using the Quartz Cron format. For example, `00***?*`.
      For more information, see quartz-scheduler.org/documentation.

  TIP: You can click **Synchronize now** ( ) regardless of any scheduled settings to initiate an immediate synchronization.
- **Synchronize picture:** Choose when to synchronize identity pictures from the external system.
  - **Always:** Identity pictures are synchronized every time a synchronization occurs.
  - **Only if missing:** Identity pictures are only synchronized when a synchronization occurs, if they are missing.

  NOTE: Including pictures increases the amount of time that it takes to import attributes.
- **Stop Synchronization on error:** Enable this option to stop synchronization if an error is encountered during the synchronization process.
- **Default web portal access:** Specifies web portal access for synchronized users.
  - **Grant access:** ClearID web portal access for synchronized users is enabled by default.

NOTE: The **username** field must be mapped to give web portal access to a ClearID identity.
- There are only two possible values for the **User type** mapping: **Admin** and **User**. Any other value entered defaults to **User**.
- If the mapping for web portal access is not set, or the value is empty, the **Default web portal access** global setting is used.

- **No access:** Web portal access for synchronized users is disabled by default.

- **Default country:** Choose one of the following:
  - **No default country:** If a synchronized identity does not include a country attribute, the country attribute is ignored.
  - **Default country:** Select a default country. If a synchronized identity does not include a country attribute, the synchronized identity uses the default country specified here.

2 Click **Save**.

The ClearID One Identity Synchronization Tool is now configured to synchronize attributes from the external system using the **Data sources** and **Synchronization** settings specified in the tool.

After you finish

After the synchronization has occurred,verify that the new attributes from the external system have been synchronized and contain the correct attributes.

Reviewing synchronization status

To check that your identity attributes were synchronized into Genetec ClearID™ correctly, you can review the synchronization status in the Genetec ClearID™ One Identity Synchronization Tool or the ClearID web portal.

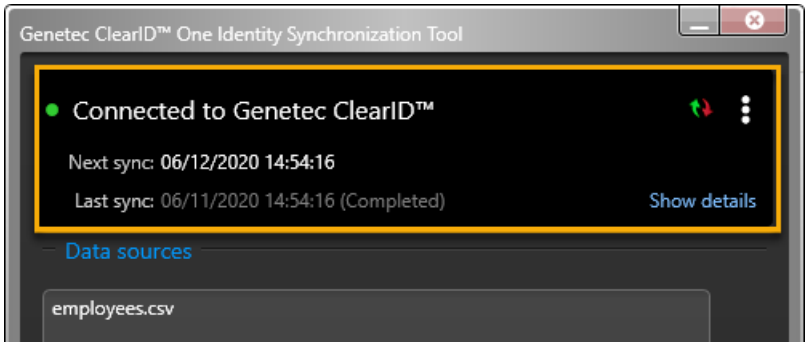
Before you begin

- Configure the One Identity Synchronization Tool.
- Perform a manual or automatic synchronization using the One Identity Synchronization Tool.

Procedure

To review your attribute synchronization status in the One Identity Configuration Tool:

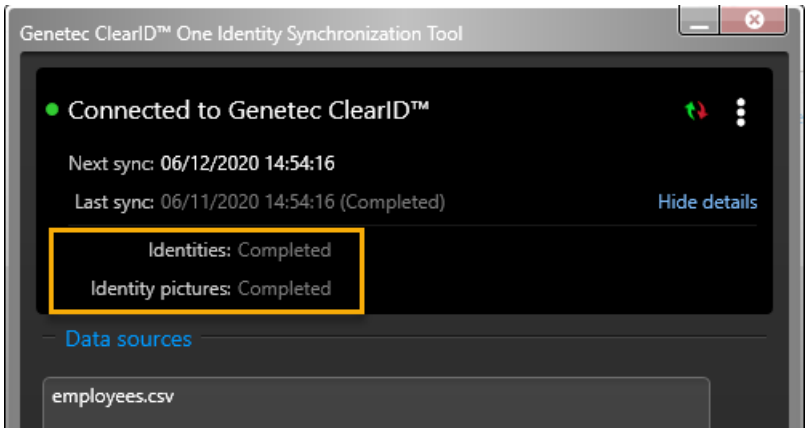
1 In the One Identity Synchronization Tool connection section, check your synchronization status.



- **Next sync:** Displays information about the next synchronization.

- If a date is displayed **06/16/2020 23:00:00**, this date indicates the **Fixed** or **Cron schedule** interval when the next synchronization is scheduled to occur.
- If **Manual synchronization** is displayed, the synchronization must be performed manually.

- **Last sync:** Displays information about the last synchronization.
- **Show details:** Click **Show details**, to check the status of synchronization for **Identities** and **Identity pictures**.



NOTE: If there is an issue with any of the synchronizations, a Failed message is displayed next to the failing synchronization.

2 (Optional) Review summary logs.
   a) Click ⋮ then click **Open logs folder**.
   b) Review CSV-formatted *Summary* logs to identity any issues that might occur during synchronization.
   c) Read the overview *Recap.txt* file for a quick synchronization overview.
   NOTE: The summary log files are saved in *C:\ProgramData\Genetec\OneIdentity\Logs\Summary*.

To review your attributes synchronization status in the ClearID web portal:

1 In the ClearID web portal, check to verify that the new attributes from the external system have been synchronized and contain the correct attributes.
   a) Click **Organization** > **Identities** and verify that your synchronized identity data is correct.

About One Identity Synchronization Tool logs

The Genetec ClearID™ One Identity Synchronization Tool includes logs that can be used for troubleshooting. The logs can be used to check the status of the configuration tool, the windows service, or review synchronization activities.

The ClearID One Identity Synchronization Tool uses the industry-standard Apache log4net™ framework for logging.

The logging configuration can be changed for both the synchronization service and the synchronization tool.

- To change the **Genetec.ClearID.OneIdentity.SynchronizationService** (*OneIdentityService.exe*) logging configuration, you can modify the *log4net.service.config* file.
- To change the **Genetec.ClearID.OneIdentity.SynchronizationTool** (*OneIdentityConfigurationTool.exe*) logging configuration, you can modify the *log4net.ct.config* file.

These log configuration files are found in the installation folder *C:\Program Files (x86)\Genetec ClearID One Identity Synchronization Service*.

The default settings are as follows:

- Log level is WARN.

- File size before rolling is 10Mb.
- Max rolling backups is 10.

For more information about the supported values and how to change them, see the Apache log4net documentation.

Viewing One Identity Synchronization Tool logs

You can use the Genetec ClearID™ One Identity Synchronization Tool logs to check the status of the configuration tool, the windows service, or review synchronization activities.

Before you begin

- Configuring the One Identity Synchronization Tool on page 519
- Configuring synchronization settings on page 545

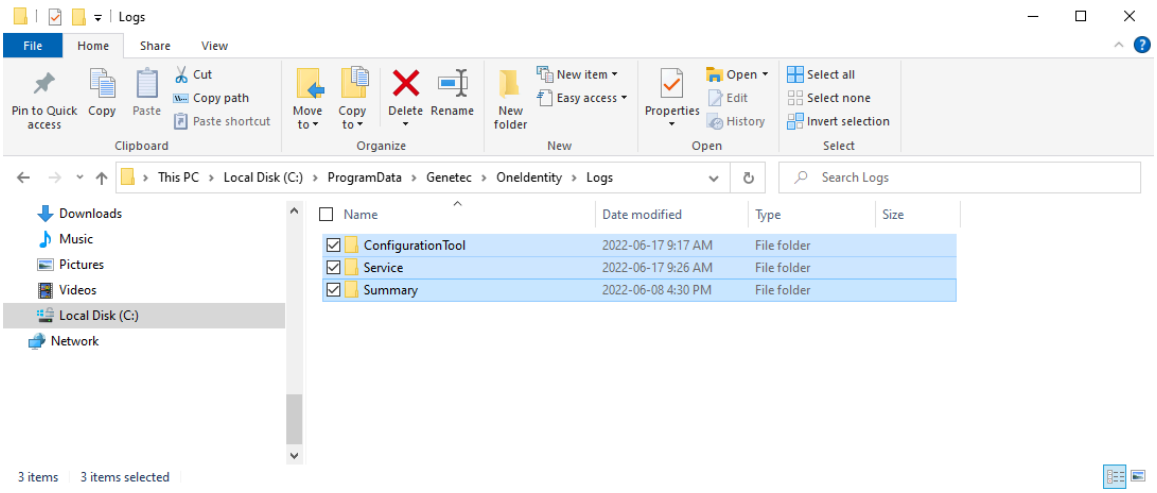
What you should know

Logs are subdivided into three separate folders as follows:

- **Configuration:** Logs related to the *Genetec ClearID™ One Identity Synchronization Tool (OneIdentityConfigurationTool.exe)*.
- **Service:** Logs related to the *Genetec.ClearID.OneIdentity.SynchronizationService (OneIdentityService.exe)*.
- **Summary:** Logs related to synchronization summaries.

Procedure

1 Click ⋮ then click **Open logs folder**.



2 Review the *ConfigurationTool* logs if you are having connectivity issues. For example, if the synchronization tool is unable to connect to ClearID or unable to connect to Azure AD.

3 Review the *Service* logs if you are having data synchronization issues. For example, missing data fields, missing name fields, or missing email addresses.

4 Review the *Summary* logs to see a summary of synchronization activities. For example, when a synchronization started or ended and what occurred during the synchronization.

a) Read the *Recap.txt* file for a quick synchronization overview.

NOTE: The summary log files are CSV-formatted files to facilitate sorting information in Microsoft® Excel if required. They are automatically generated at the end of the synchronization.

- If the synchronization completely fails, the summary log files are not generated.
- If there is nothing to import, the summary log files are not created.

Updating existing identities from an external data source

When users that have already been created have the same external ID as existing users, you can use Genetec ClearID™ One Identity Synchronization Tool to update the existing identities information from an external data source.

What you should know

This procedure is relevant for newly installed ClearID One Identity Synchronization Tool service when the Genetec ClearID™ environment already contains identities that are also present in the external system data source.

- When an external ID already exists in ClearID, that identity is updated with the values provided in the data sources.
- When an identity from the data source does not exist in One Identity (for example, on the first synchronization), the service tries to create the identity in ClearID.
- When the creation fails because the identity already exists, that identity is then fetched and updated.

Procedure

1 To reproduce a newly installed service, delete the file mappings under *%ProgramData%\Genetec \OneIdentity\Configuration*.

2 Configure a data source that already contains one or more identities that are present in ClearID.

The identities in the data source should have the same external ID and email as the identities in ClearID.

3 Start the synchronization and wait for completion.

The identities in ClearID are updated with the mappings from the data source.

Synchronizing identities using LDAP

Use the Genetec ClearID™ LDAP Synchronization Agent to synchronize Active Directory (AD) Lightweight Directory Access Protocol (LDAP) attributes into Genetec ClearID™ identity attributes. These identity attributes in ClearID can then be used to assign people to roles and automate role-based access control.

Procedure

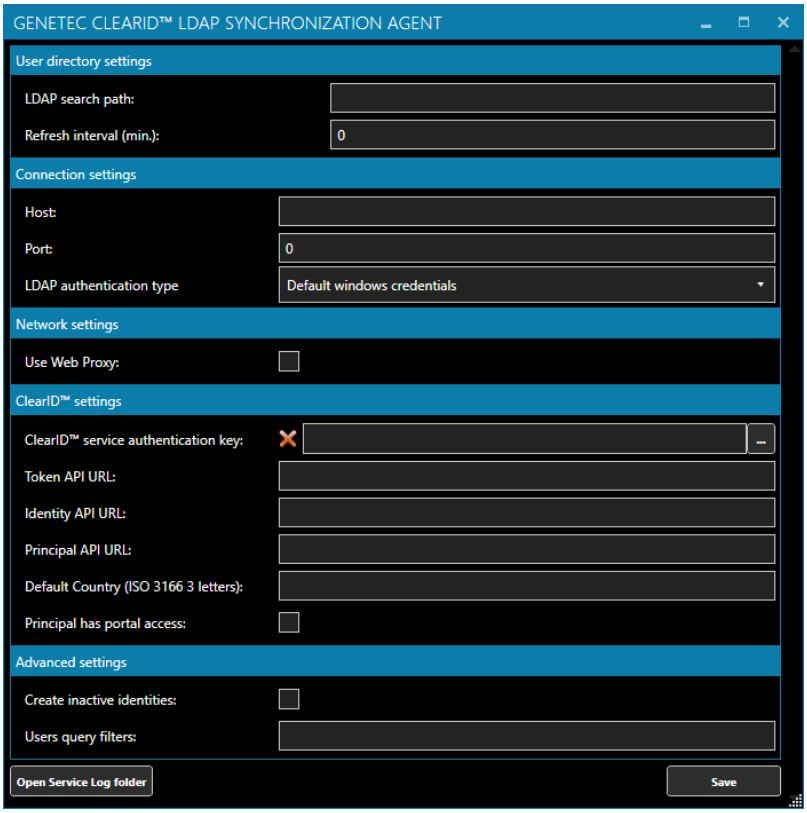
1 Learn about the Genetec ClearID™ LDAP Synchronization Agent.

2 Learn about LDAP attributes to ClearID attribute mappings.

3 Configure the Genetec ClearID™ LDAP Synchronization Agent.

About ClearID LDAP Synchronization Agent

The Genetec ClearID™ LDAP Synchronization Agent is a Windows application that is used to synchronize Active Directory (AD) Lightweight Directory Access Protocol (LDAP) attributes into Genetec ClearID™ identity attributes.



The ClearID LDAP Synchronization Agent application includes the following components:

- **Konfigurator** (*Genetec.ClearID.LdapSyncAgentConfiguration.exe*) is the user interface component of the windows application that is used to configure the synchronization agent.
- **Genetec ClearID LDAP Synchronizer** (*Genetec.ClearID.LdapSyncAgent.Service.exe*) is the Windows service component of the application that performs Active Directory LDAP attributes to Genetec ClearID™ identity attributes synchronization automatically in the background at intervals specified in the Synchronization Agent.

The ClearID LDAP Synchronization Agent application is intended for use by IT or security personnel responsible for Active Directory (AD) administration.

Synchronization

Identities in ClearID can come from a variety of data sources (Databases, HR, External Sources) and can be synchronized using various tools (Genetec ClearID™ LDAP Synchronization Agent, Genetec ClearID™ API, or Genetec ClearID™ One Identity Synchronization Tool).

The following information describes Active Directory LDAP synchronization:

- Synchronization of LDAP attributes into ClearID identity attributes is INBOUND only.

  CAUTION: Any changes only made to identities in ClearID can be overwritten by the next synchronization from the Active Directory.
- Synchronization occurs automatically at the intervals specified in the ClearID LDAP Synchronization Agent.
  - The *whenChanged* attribute indicates the last time that a synchronization occurred. This attribute is then used to query Active Directory users that have changed since the last synchronization so that only changed users are updated when the next synchronization occurs.
  - The first time a synchronization occurs, all Active Directory user attributes are synchronized.
  - The next time a synchronization occurs, only Active Directory user attributes that have changed since the last time the agent ran are synchronized.

LDAP attributes to ClearID attribute mappings

When you synchronize an Active Directory (AD) with Genetec ClearID™ using the ClearID LDAP Agent Configurator, Lightweight Directory Access Protocol (LDAP) attributes are mapped to ClearID identity attributes.

LDAP attributes to ClearID attribute mappings

LDAP attributes	ClearID identity attributes
whenChanged **IMPORTANT:** The *whenChanged* attribute indicates the last time a synchronization with the ClearID LDAP Synchronization Agent occurred. This attribute is then used to query Active Directory users that have changed since the last synchronization so that only changed users are updated when the next synchronization occurs.	Not applicable
userAccountControl	Status **NOTE:** The ClearID *Status* attribute is set to inactive if the Active Directory attribute *userAccountControl* is set to disabled.
givenName	FirstName
sn	LastName
displayName	DisplayName
jpegPhoto	**NOTE:** *jpegPhoto* Is used to upload a picture into the ClearID identity.

LDAP attributes	ClearID identity attributes
thumbnailPhoto (fallback if jpegPhoto is empty)	**NOTE:** *thumbnailPhoto* is used as a fallback (if jpegPhoto is empty) to upload a picture into the ClearID identity.
countryCode	CountryCode
employeeID	EmployeeNumber
employeeNumber (fallback if employeeID is empty)	EmployeeNumber
title	JobTitle
telephoneNumber	PhoneNumberPrimary
phone	PhoneNumberSecondary
Mobile (fallback if phone is empty)	PhoneNumberSecondary
department	DepartmentName
company	CompanyName
userPrincipalName **NOTE:** The userPrincipalName attribute is used as the link between the AD user and the ClearID identity.	Email, ExternalId
manager	SupervisorName
mail	Email

Configuring the ClearID LDAP Synchronization Agent

Before you can synchronize an Active Directory (AD) with Genetec ClearID™, you must first configure the Genetec ClearID™ LDAP Synchronization Agent.

Before you begin

- Download a service authentication key.
- Install the ClearID LDAP Synchronization Agent on its own dedicated server. It does not require a Security Center server.

  NOTE: The ClearID LDAP Synchronization Agent is not generally available as a public download. The synchronizer download is supplied by your Deployment contact when needed.
- Part number: CD-IDSYNC-SERVICE-1Y is required for LDAP import.

What you should know

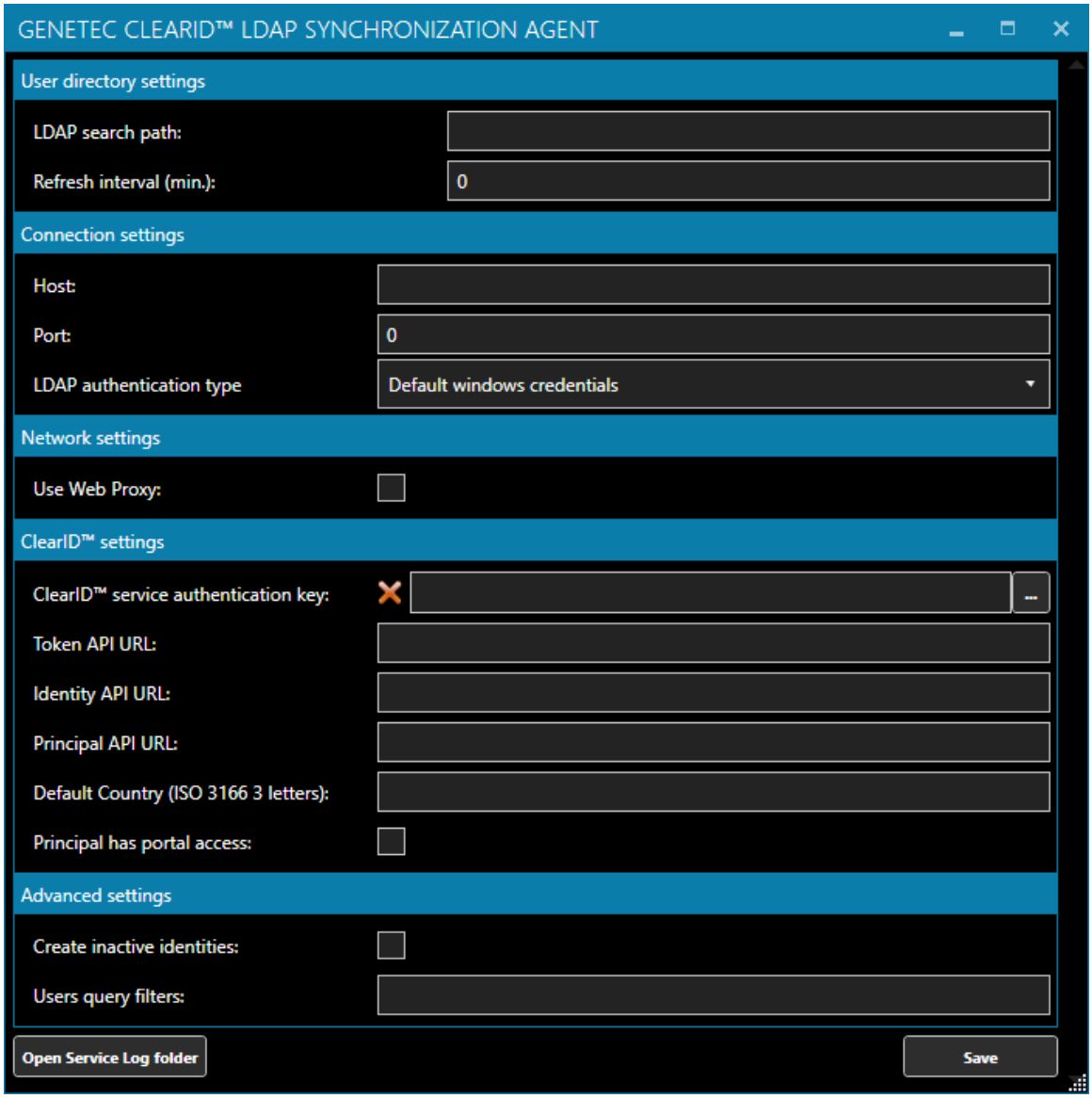
This procedure is for IT or security personnel responsible for Active Directory (AD) administration.

Synchronization of LDAP attributes into ClearID identity attributes is INBOUND only.

CAUTION: Any changes only made to identities in ClearID can be overwritten by the next synchronization from the Active Directory.

Procedure

1 Open the ClearID LDAP Synchronization Agent (*Genetec.ClearID.LdapSyncAgentConfiguration.exe*) and configure your settings.



2 In the *User directory settings* section, enter your user directory details:

The *User directory settings* section is used to connect to the LDAP directory containing user attributes.

- **LDAP search path:** Enter your organizational unit. For example, `OU=Genetec`. This search path specifies the location, root folder, or group containing Active Directory user attributes.

  NOTE: The **distinguishedName** of the AD group is required for the LDAP search path field.
- **Refresh interval (min.):** Enter a refresh interval in minutes. For example, 60 to synchronize attributes every hour.

  NOTE: Depending on the size of your organization and the number of attributes, *12hr.* or *24hr.* synchronizations (720 or 1440 mins) might be more appropriate.

3 In the *Connection settings* section, configure the host connection settings:

The *Connection settings* section is used to connect to the server where the User Directory settings are stored.

- **Host:** Enter the address of your Active Directory. For example, `Genetec.com`.
- **Port:** Enter the default port for your Active Directory. For example, 389.
- **LDAP authentication type:** Select an authentication type from the following:
  - **Default windows credentials:** For a client-side application, this option uses the Windows credentials (*username* and *password*) of the user running the application.
  - **Simple bind:** With the Simple bind option, the credentials (*username* and *password*) used to bind the LDAP client to the LDAP server are passed over the network unencrypted.
    CAUTION: Simple bind authentication type is not recommended in production LDAP servers.
  - **Simple bind over SSL:**

    BEST PRACTICE: With the Simple bind over SSL option, the credentials (*username* and *password*) used to bind the LDAP client to the LDAP server are passed over the network encrypted.
    - **Username:** If **Simple bind** or **Simple bind over SSL** was selected, enter the *username* supplied by your organization.
    - **Password:** If **Simple bind** or **Simple bind over SSL** was selected, click **Set password** and enter a `password`, then click **OK**.
      NOTE: Use industry best practices for creating strong passwords. All passwords stored in the configuration file are encrypted.

4 (Optional) In the *Network settings* section, configure the Web proxy settings:

The *Network settings* section is used to configure proxy settings.

- **Use Web Proxy:** Select the **Use Web Proxy** checkbox to specify that a proxy server is required to access the internet.

  This option is typically used by customers behind a firewall or where network access to the internet is restricted.

  A proxy server is a server that verifies and forwards incoming client requests to other servers for further communication. For example, when a client is unable to meet the security authentication requirements of the server but should be permitted access to some services.
- **Proxy URL:** If **Use Web Proxy** is enabled, enter the `proxy` URL supplied by your organization.

  For example, *https://proxy:8080/outgoing*. This information is typically supplied by the network administration team.
- **Proxy Authentication:** Proxy authentication is the process of validating user credentials for access to a proxy server. This authentication typically includes a *username* and can also include a *password*.

  Click to select either **Default Credentials** or **Specific Credentials**:
  - **Default Credentials:** Specifies that proxy authentication is not required.
  - **Specific Credentials:** Specifies that proxy authentication is required.
    - **Proxy Username:** If proxy authentication **Specific Credentials** was enabled, enter the proxy `username` supplied by your organization.
    - **Proxy Password:** Click **Set password** and enter a `password`, then click **OK**.
      NOTE: Use industry best practices for creating strong passwords.
    - **Proxy Domain:** Enter the `domain name` supplied by your organization.
- **Proxy connection status:** Status icons indicate a valid () or invalid () proxy connection. The status is only displayed after the **Verify** button has been clicked.
- **Verify:** Click **Verify** to test that the connection settings for your proxy server are valid.

5 In the *ClearID settings* section, configure the settings:

The *ClearID settings* section is used to connect to ClearID services and synchronize data.

- **ClearID service authentication key:** Click more () to navigate to and select the authentication key for your API integration. This key is used to authenticate the synchronization agent communications when making requests to your ClearID account.
  -  Indicates that the synchronization agent is not connected to ClearID and a private key is needed.
  -  Indicates that the synchronization agent is connected to ClearID and that the private key has been provided.

The following API URL settings are automatically completed after the **ClearID service authentication key** has been selected:

- **Token API URL (read-only):** The Token service provides the authentication token to contact the identity and principal service.
- **Identity API URL (read-only):** The Identity service is used to access all ClearID identity information.
- **Principal API URL (read-only):** The Principal service is used to give web portal access to users.
- **Default Country (ISO 3166 3 letters):** Enter your three-letter country code. For example, the USA or CAN.

  NOTE: The three-letter country codes are based on the Alpha-3 codes in the ISO 3166-1 country codes standard.
- **Principal has portal access:** Select the checkbox to enable ClearID web portal access for synchronized users.

6 (Optional) In the *Advanced settings* section, leave these fields blank.

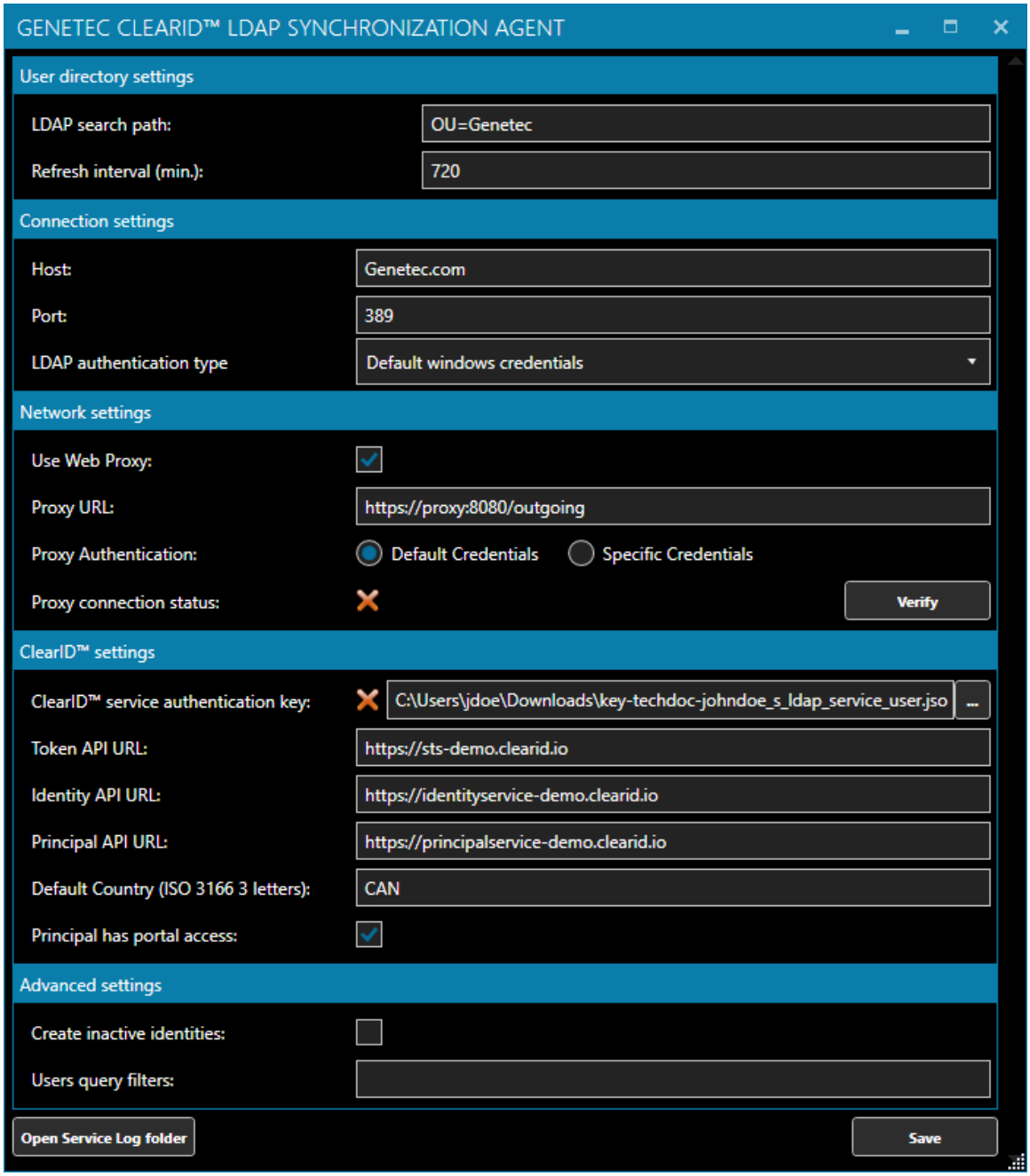
The *Advanced settings* section is used to customize the synchronization agent behavior.

- **Create inactive identities:** Select the checkbox to create inactive ClearID identities for any inactive users found in the Active Directory during synchronization.

  BEST PRACTICE: This checkbox is typically cleared to prevent the creation of inactive users.
- **Users query filters:** (Optional) Enter custom user query filters as specified by your deployment contact.

  IMPORTANT: Only use this option when you are advised to by your deployment contact.

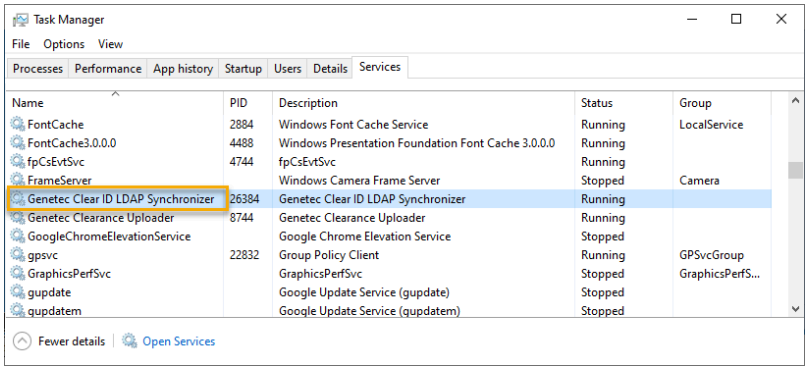
7 Click **Save**.



The Synchronization Agent config file is saved to *C:\ProgramData\Genetec ClearID LDAP Synchronizer \config.json*

TIP: You can delete this file if you want to remove all your settings and configure the synchronization agent again.

8 Open the Windows Task Manager, and right-click the **Genetec ClearID LDAP Synchronizer** (*Genetec.ClearID.LdapSyncAgent.Service.exe*) windows service.



a) If it is the first time you configure the agent, click **Start** to start your service so that your configuration settings are activated.

b) If the agent is already running, click **Restart** to restart your service so that your configuration changes are activated.

Your ClearID Synchronization Agent is now configured to automatically synchronize Active Directory LDAP attributes into ClearID identity attributes.

After you finish

1. Check the ClearID web portal to verify that the new identities for Active Directory users have been synchronized and contain the correct attributes.
2. (Optional) You can click **Open Service Log folder** to view the *ErrorLog.txt* or *Eventlog.txt* log files.

   NOTE: The information in the *Service Log* folder is typically used when you raise a support call or if advised by your deployment contact to send Service logs to Genetec Inc..

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Visitor management devices

Learn about the ClearID Self-Service Kiosk mobile app that simplifies visitor management and check-in.

This section includes the following topics:

About ClearID Self-Service Kiosk

Genetec ClearID™ Self-Service Kiosk is a mobile app that simplifies the management of visitors enrolled using the Genetec ClearID™ self-service portal. The self-service kiosk is intended for visitor centers or gated facilities where guests check-in by themselves.

Visitors can check in at the ClearID Self-Service Kiosk using several methods:

- Find a visitor associated with a visit by scanning their invitation QR code.
- Find a visitor associated with a visit by scanning their drivers license.
- Find a visitor associated with a visit by scanning their passport or citizen card (MRZ data).
- Find a visitor associated with a visit by scanning their Identity Document (various ID types from more than 200 countries).
- Find a visitor associated with a visit by their email.

NOTE: After visitors are checked-in from the ClearID Self-Service Kiosk, the host is notified by email and SMS message (if enabled).

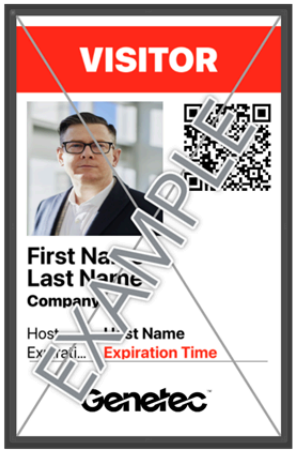
With the ClearID Self-Service Kiosk, you can also do the following:

- Screen visitors during a self-service check-in or a self-registration.
- Take a photo of the visitor[1].
- Print a visitor badge using a wireless label printer (Bluetooth or Wi-Fi). The badge includes a photo and identifies the visitor and the event they are attending.
- Visitor self-registration.
- Company logos on the ClearID Self-Service Kiosk and visitor badges.
- Customer-specific welcome and assistance messages on the ClearID Self-Service Kiosk.

NOTE: [1]This photo is only used on the printed badge. The photo is not saved or stored for later use to ensure that visitor information is protected.

Visitor badges

The following examples show visitor badges in *portrait* and *landscape* orientation.



Badge dimensions: **10 x 6.1 cm's** or **3.94 x 2.56 inches**.

To download the Genetec ClearID™ Self-Service Kiosk mobile app, visit the App Store.

Related Topics

Supported devices on page 77
Identity document types on page 626
ClearID Self-Service Kiosk Datasheet (2 pages)

Self-Service Kiosk check-in

Use this information to help you understand how visitors check in at a Genetec ClearID™ Self-Service Kiosk.

Example

NOTE: Visitors can check in up to 1 hour before a visit event.

Scenario 1: Self-Service Kiosk check-in (paper badge)

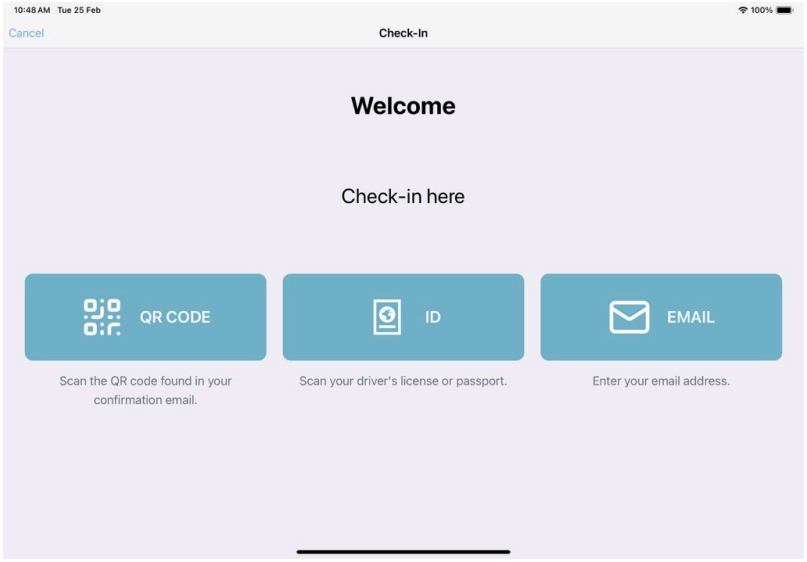
Visitors can easily check in at a ClearID Self-Service Kiosk. Using their emailed QR code, visitors scan the code, take a picture, and print a visitor badge that identifies the visitor and the event they are attending.

Scenario 2: Self-Service Kiosk check-in (cardholder credential)

Using Security Center, a receptionist can assign a credential to Genetec ClearID™ visitors, the visitor can then use their card to access specified areas in the building when accompanied by their host.

Self-service check-in

The self-service check-in is intended for visitors who have been invited or pre-registered.



You can use the ClearID Self-Service Kiosk to check in yourself using QR code, ID, or email up to 1 hour before a visit event:

- If duplicate names are found, you select your unique email from list.
- If you scan a QR code that is not found, the Self-Service Kiosk switches to looking for visitor by email.
- If an ID or email is not found the Self-Service Kiosk switches to the self-registration process.

NOTE: The check-in choices displayed on the ClearID Self-Service Kiosk **Welcome** page can be customized to hide any options that are not relevant to your site or your visitor experience.

For more information, see the **Kiosks** tab section in Enabling visitor management for sites on page 247.

Related Topics

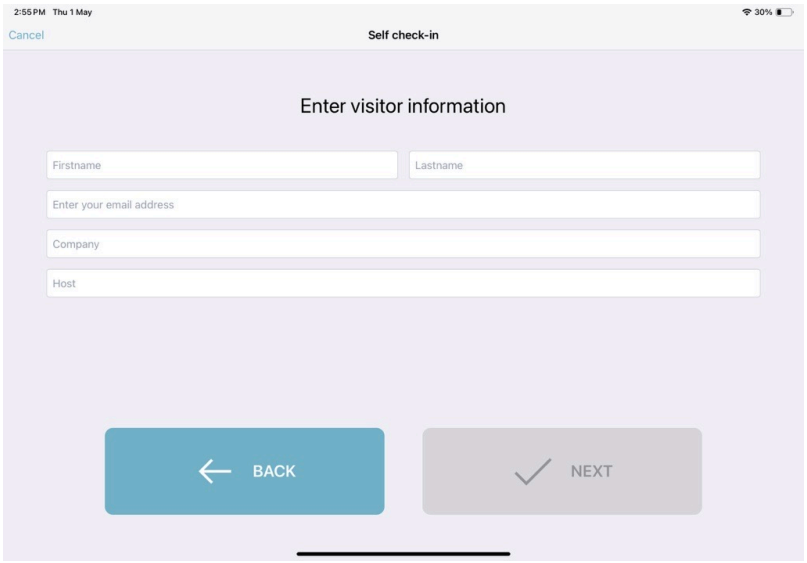
Enabling visitor management for sites on page 247

Self-Service Kiosk self registration

The Genetec ClearID™ Self-Service Kiosk self-registration process is designed to manage unplanned visits or visitors who have not been invited or pre-registered.

The self-registration workflow is triggered (if enabled for your account) when a visitor arrives on site with no invite and they are not found in the system during the self-service check-in process.

NOTE: Any pre-filled entries cannot be modified.



The self-registration process is linked to a site. Visitors are accepted automatically with default entry-level visitor access to the site. For example, Front door, reception, or check-in area to ensure a smooth check-in experience.

IMPORTANT: Any visitors on a block list will be denied access if the *watchlist* function is enabled for your account, and the *watchlist manager* is notified. In this situation, the visitor should talk to security or reception staff.

Configuring the Self-Service Kiosk iPad

Before visitors can use the self-service kiosk to check in or check out, you must add the Genetec ClearID™ Self-Service Kiosk iPad device to Genetec ClearID™. Then you can register and activate the device in the ClearID Self-Service Kiosk mobile app.

Before you begin

- Wi-Fi must be enabled on the self-service kiosk device before activating the device.
- Your device must be running iOS 16.6 or later.

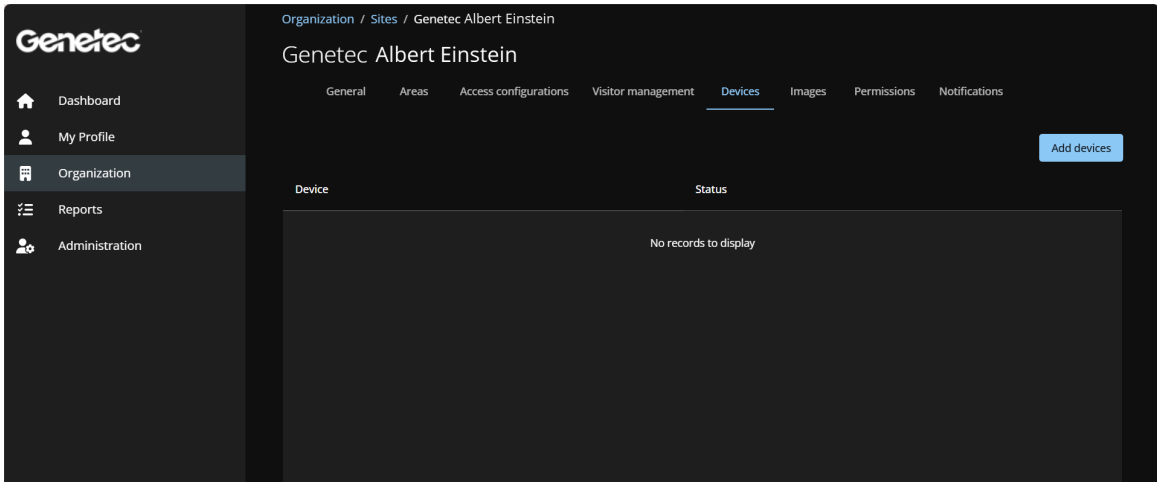
What you should know

- Only an *administrator* or a *Site owner* can generate a device activation code in ClearID.
- You can only activate and associate a ClearID Self-Service Kiosk with one site at a time.
- The ClearID Self-Service Kiosk iPad must be on the same Wi-Fi network as the label printer.

Procedure

1 In ClearID, click **Organization** and select your site.

2 On the *Site* page, click **Devices**.



a) Click **Add devices** to configure your ClearID Self-Service Kiosk in ClearID.

b) In the *Add devices* dialog, enter a name for the device.

TIP: Consider including the associated site or area in the name to help you easily identify your device in the future.

c) Enter the number of devices that you want to add, and click **Add**.

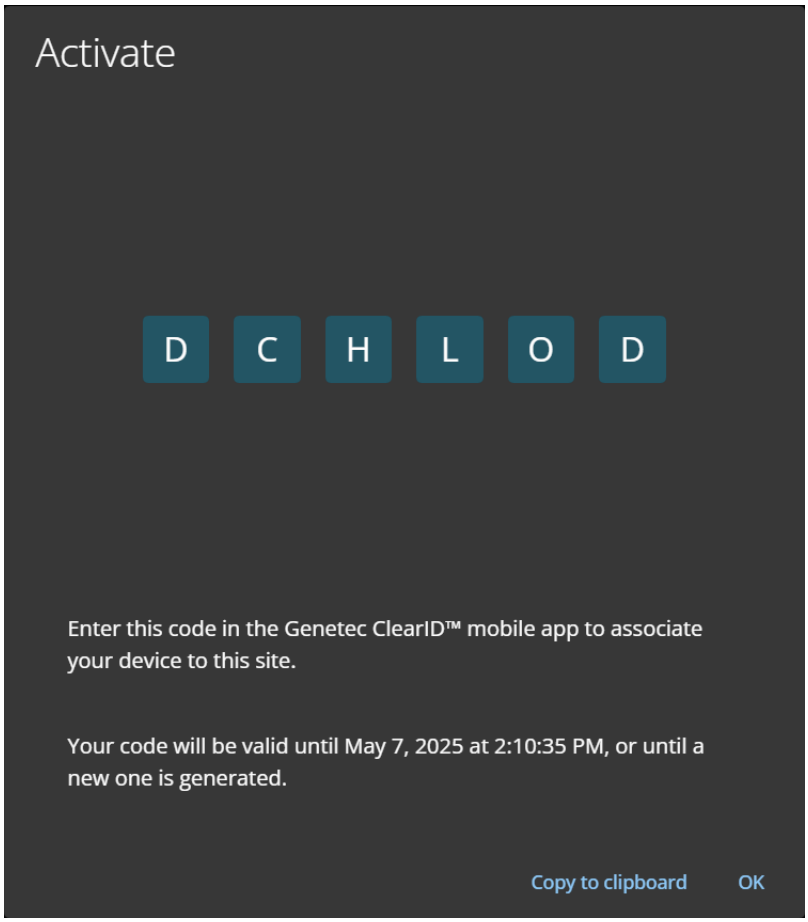
NOTE: You can configure up to 50 devices with a single activation code.

3 Download the ClearID Self Service Kiosk app on the iOS devices that you want to register,

4 Activate your kiosk in ClearID:

a) Select your iPhone from the devices list.

b) In the **Status** field, click **Generate activation code**.



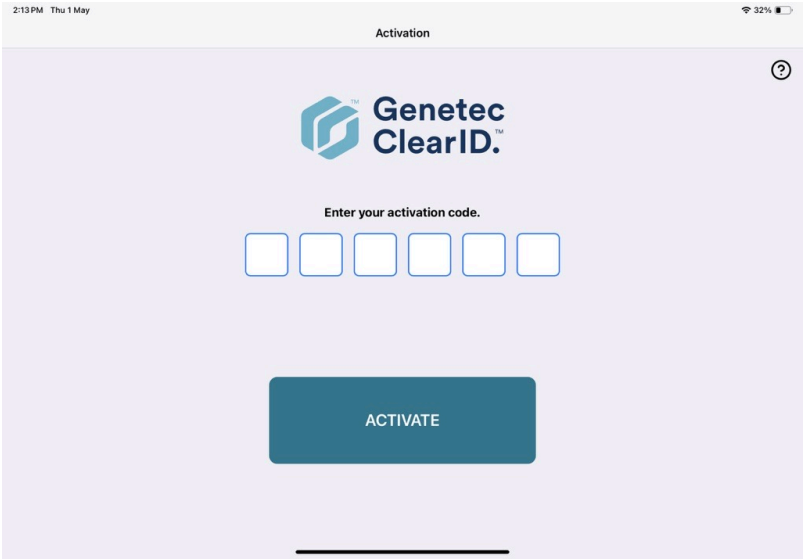
c) Make a note of the activation code for later use.

d) (Optional) Copy to clipboard.

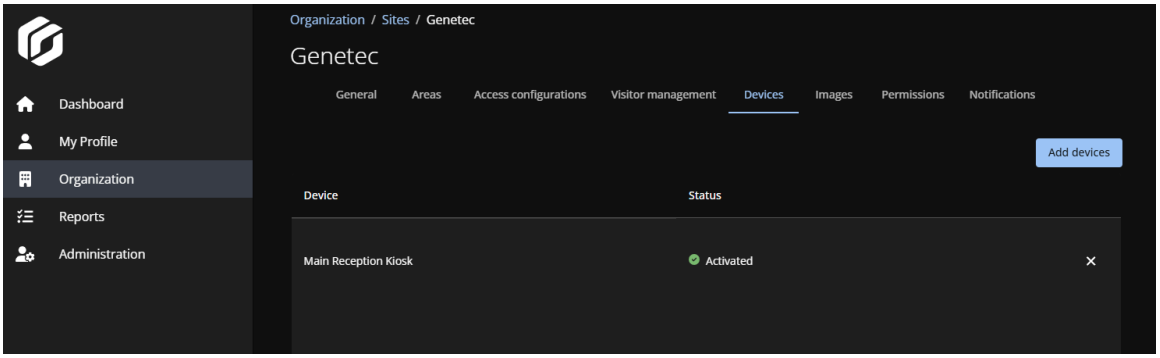
TIP: Use **Copy to clipboard** when the person who registers the ClearID mobile operator check-in device in the ClearID portal is different to the person who activates the device. Once the code is in the clipboard, it can be emailed to the person who activates the device.

e) Click **OK**.

5 In the ClearID Self-Service Kiosk mobile app, enter your device activation code and tap **Activate**.



Your self-service kiosk is now activated in ClearID and ready for use.



Example

Watch this video to learn more. Click the **Captions** icon (**CC**) to turn on video captions in one of the available languages.

After you finish

- Configure your kiosk label printer
- (Optional) Customize your banner image for email notifications
- (Optional) Customize your Self-Service Kiosk configuration
- (Optional) Customize your Self-Service Kiosk badge logo

Related Topics

Supported devices on page 77
Firewall ports on page 75

Customizing the Self-Service Kiosk configuration

Configure your site images and kiosk options to customize the choices that are displayed to visitors using your Genetec ClearID™ Self-Service Kiosk during the check-in or check-out process. Customization can include company logos, kiosk themes, and customer-specific welcome and assistance messages.

Before you begin

Configuring the Self-Service Kiosk iPad on page 564

TIP: Ensure that your welcome screen images meet the requirements described in the tooltip on the **Visitor management** > **Kiosks** page of the Genetec ClearID™ web portal.

What you should know

Only a site owner or account administrator can customize the kiosk configuration options.

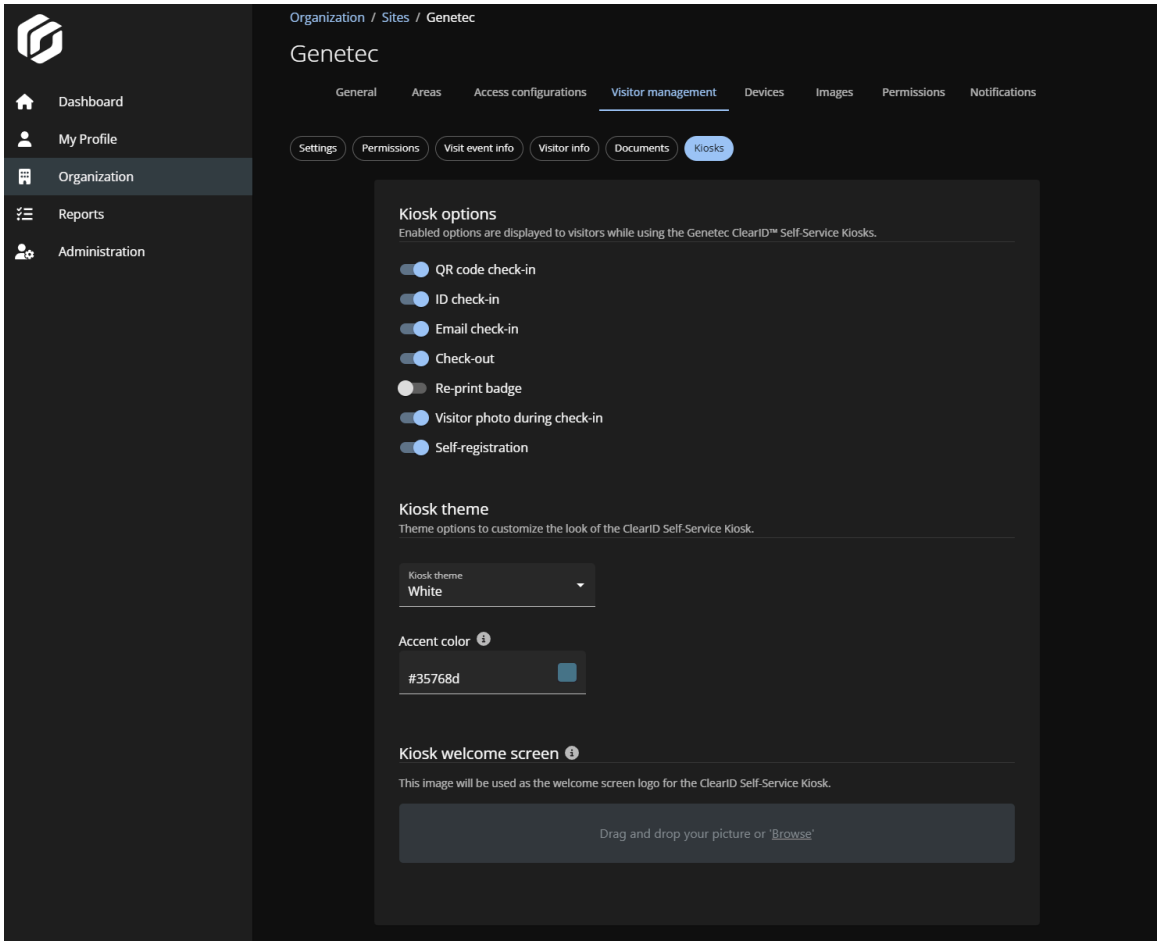
- Customized kiosk options changes are synchronized with your kiosk every 60 seconds.

BEST PRACTICE: For optimum results, use transparent *.PNG* images when customizing your welcome screen image.

Procedure

1 In the ClearID web portal,click **Organization** and select your site.

2 Click **Visitor management** > **Kiosks**.



3 In the *Kiosk* tab, customize your kiosk configuration options as required:

a) (Optional) In the *Kiosk theme* section, choose a theme to customize the look of the kiosk.

For example, select the **White** theme and choose an **Accent color** that aligns with your corporate branding.

b) (Optional) In the *Kiosk welcome screen* section, upload an image to use as the welcome screen logo.

For example, a *company name* or *logo* that aligns with your corporate branding.

For more detailed information and to see examples of these kiosk customizations, see Enabling visitor management for sites on page 247.

4 Click **Save**.

Example

Watch this video to learn more. Click the **Captions** icon (**CC**) to turn on video captions in one of the available languages.

Customizing the Self-Service Kiosk visitor badge logo

You can customize the visitor badge logo image that is used on temporary badges or visitor badges printed by the kiosk.

Before you begin

Configuring the Self-Service Kiosk iPad on page 564

TIP: Ensure that your badge logo images meet the requirements described in the tooltip on the **Images** page of the Genetec ClearID™ web portal.

What you should know

Only a site owner or account administrator can customize the visitor badge logo.

- Customized Kiosk options changes are synchronized with your kiosk every 60 seconds.

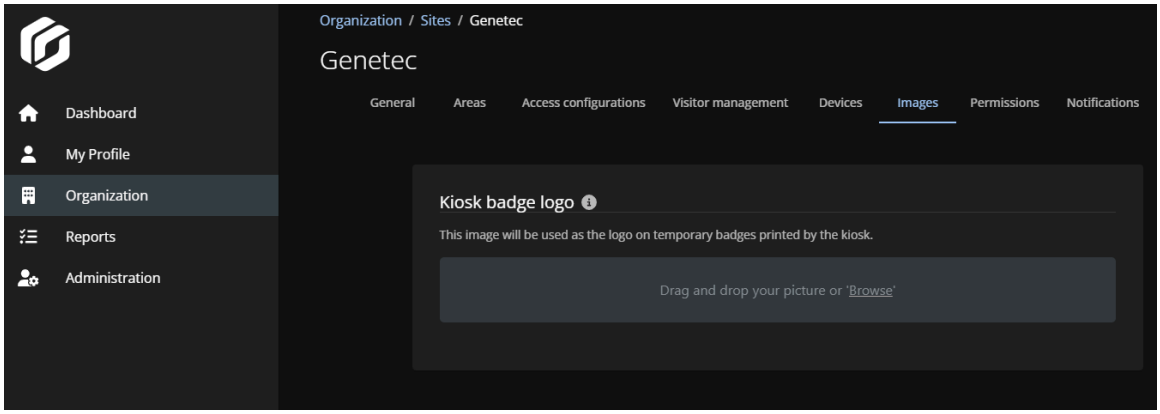
BEST PRACTICE: For optimum results, use transparent *.PNG* images when customizing your visitor badge logo.

Procedure

1 In the ClearID web portal, click **Organization** > **Sites**.

2 Search for and select a site.

3 Click **Images**.



a) In the *Kiosk badge logo* section, drag and drop your picture or browse to select a **Kiosk badge logo**.
This image is used as the logo on temporary badges printed by the kiosk.
b) Click **Save**.
The following example shows a custom badge logo for the kiosk.

Adding visitor compliance documents to the Self-Service Kiosk

For sites with special requirements, *Account administrators* and *Site owners* can upload documents like non-disclosure agreements, waivers, and more for visitors to sign when checking in using the Self-Service Kiosk.

Before you begin

Enable visitor management for sites.

What you should know

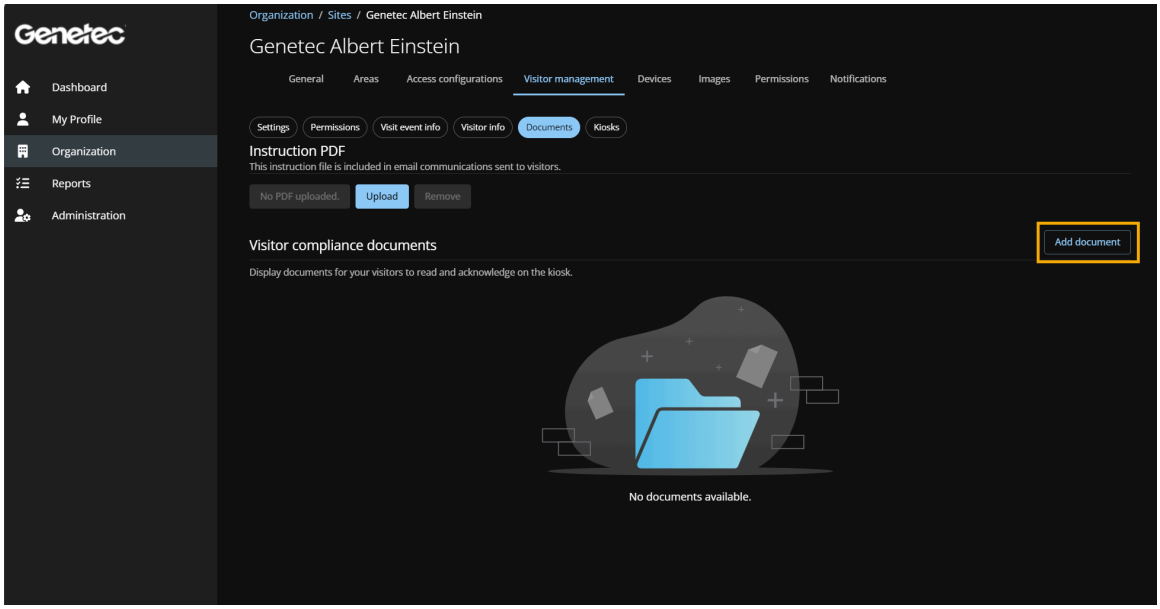
- You must be an *Account administrator* or *Site owner* to add documents for visitors to acknowledge to the Self-Service Kiosk.

- You can display up to five documents on the kiosk during check-in.

Procedure

1 In the Genetec ClearID™ web portal, click **Organization** > **Site** > **Visitor management** > **Documents**.

2 Click **Add document**.



IMPORTANT: These documents must be in PDF format.

a) In the **Display name** field, enter a name for the document.

b) Drag and drop a file into the field, or click **Browse** to search for a file.

3 Configure your sharing preferences for the document as needed:

a) Select the **Show document on the kiosk** checkbox to show the document on the Kiosk during visitor check-in.

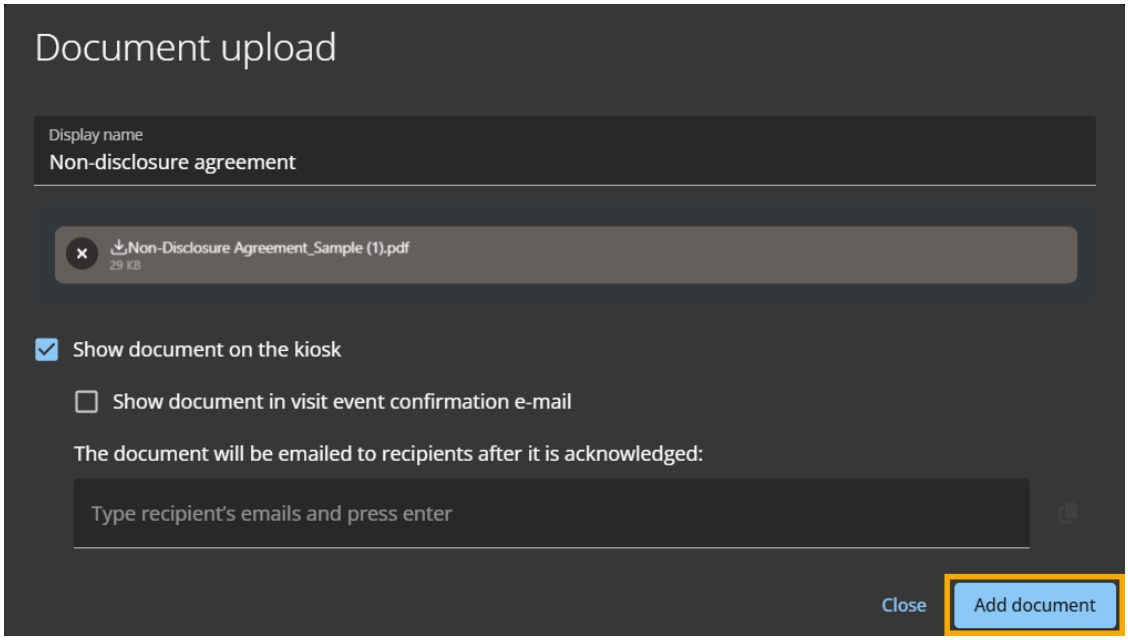
TIP: When the checkbox is not selected, the document remains available in draft mode.

b) Select the **Show document in visit event confirmation e-mail** checkbox to attach a copy of the document to visitor confirmation emails so that visitors can review the documents before they arrive.

c) Add a list of recipients who should receive a copy of the document once visitors acknowledge it.

NOTE: You can click to copy the complete list of recipients, for example, to add the same recipients to other compliance documents.

4 Click **Add document** to save your document.



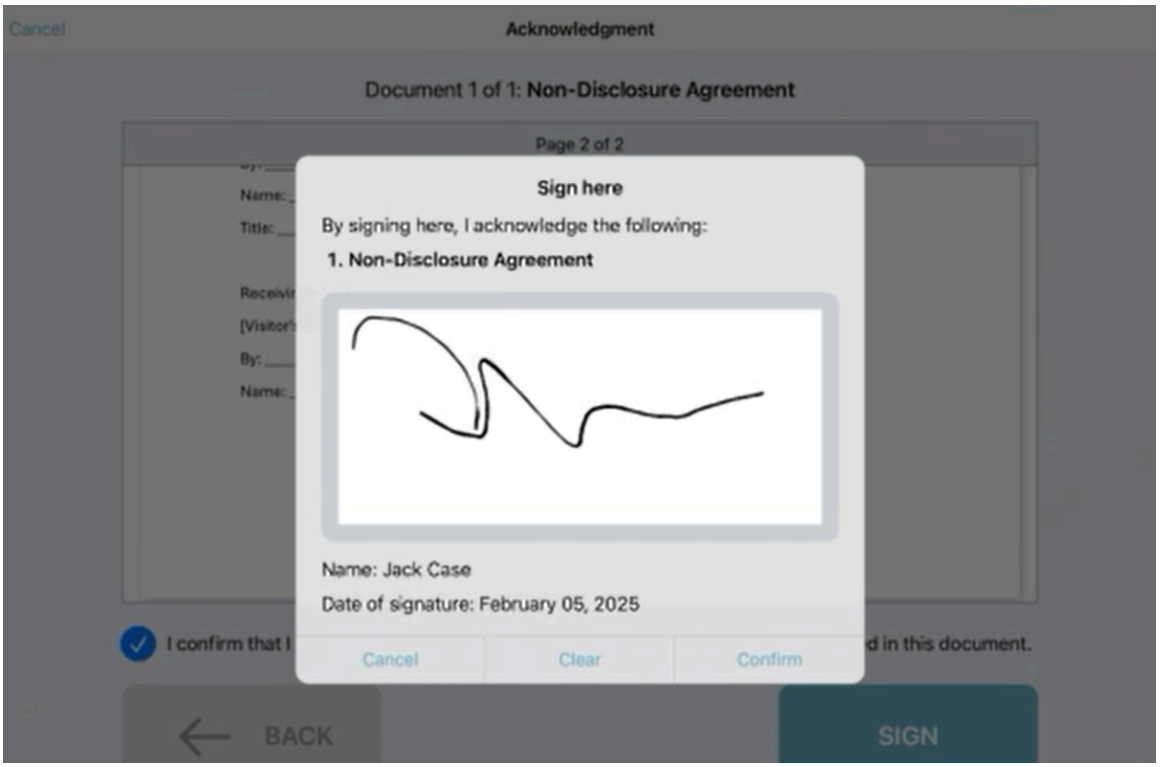
5 Use the icons to manage each uploaded document:

a) Click to modify an existing document.

b) Click to download a local copy of the document.

c) Click to remove a document.

Visitors have to confirm they have read any uploaded documents and sign them during check-in at the Self-Service Kiosk.



Activating badge reprinting

As a *Site owner*, you can activate badge reprinting so that visitors can reprint lost or damaged temporary badges from the ClearID Self-Service Kiosk.

Before you begin

Configure the Self-Service Kiosk iPad.

What you should know

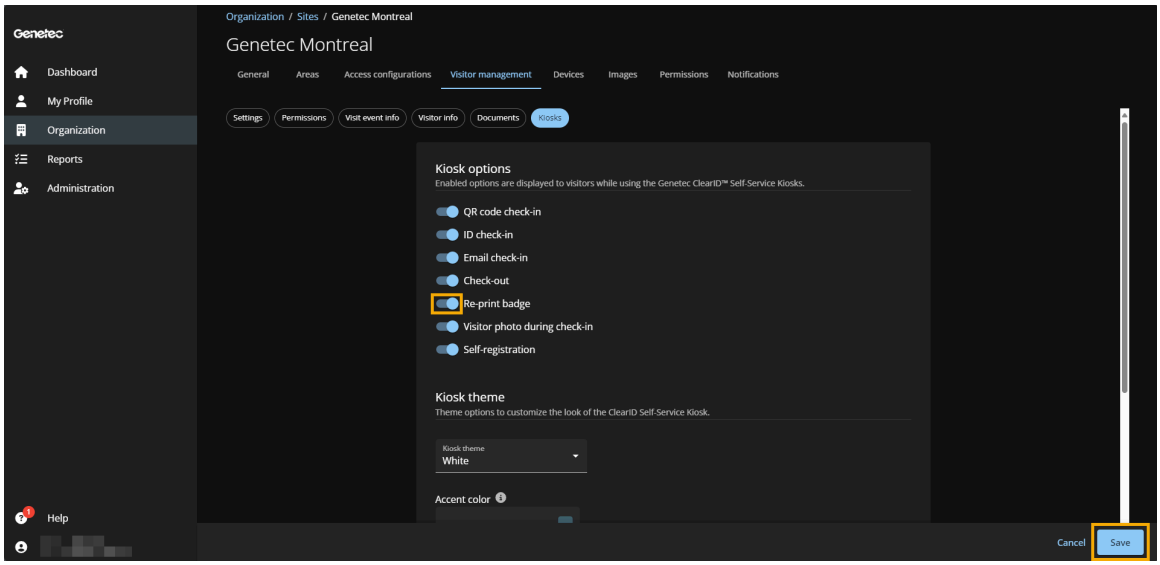
You must be a *Site owner* to activate badge reprinting with the ClearID Self-Service Kiosk.

BEST PRACTICE: Visitor QR codes configured as credentials should only give access to non-secure areas.

Procedure

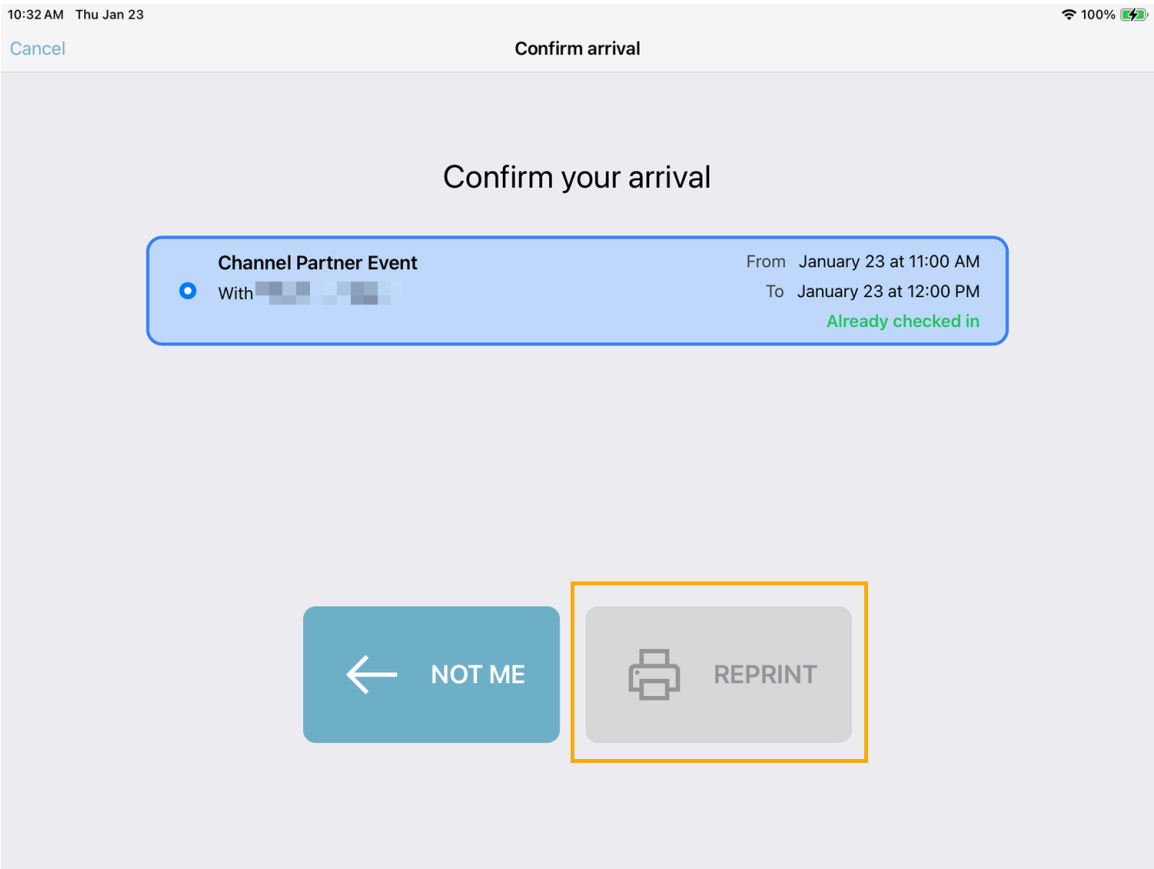
1 In the Genetec ClearID™ web portal, click **Organization** > **Site** > **Visitor management** > **Kiosks**.

2 In the *Kiosk options* section, turn on the **Re-print badge** option.



3 Click **Save**.

Visitors can now reprint their temporary badges by accessing their visit information on a Self-Service Kiosk.



Disabling visitor photo during check-in

For sites where visitor privacy is crucial, *Site owners* can disable photo-taking during visitors check-in at the ClearID Self-Service Kiosk.

Before you begin

Configure the Self-Service Kiosk iPad.

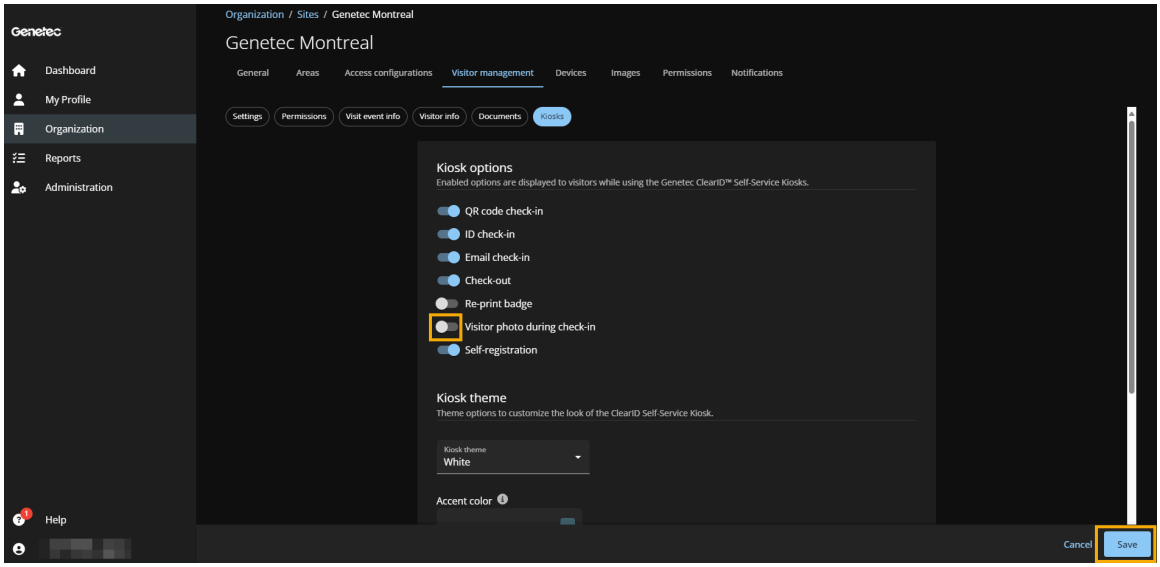
What you should know

You must be a *Site owner* to disable visitor photos during check-in with the ClearID Self-Service Kiosk.

Procedure

1 In the Genetec ClearID™ web portal, click **Organization** > **Site** > **Visitor management** > **Kiosks**.

2 In the *Kiosk options* section, turn off the **Visitor photo during check-in** option.



NOTE: Visitor photo during check-in is turned on by default.

3 Click **Save**.

Visitors can now check in at a Self-Service Kiosk without having to take a photo.

Mobile operator check-in

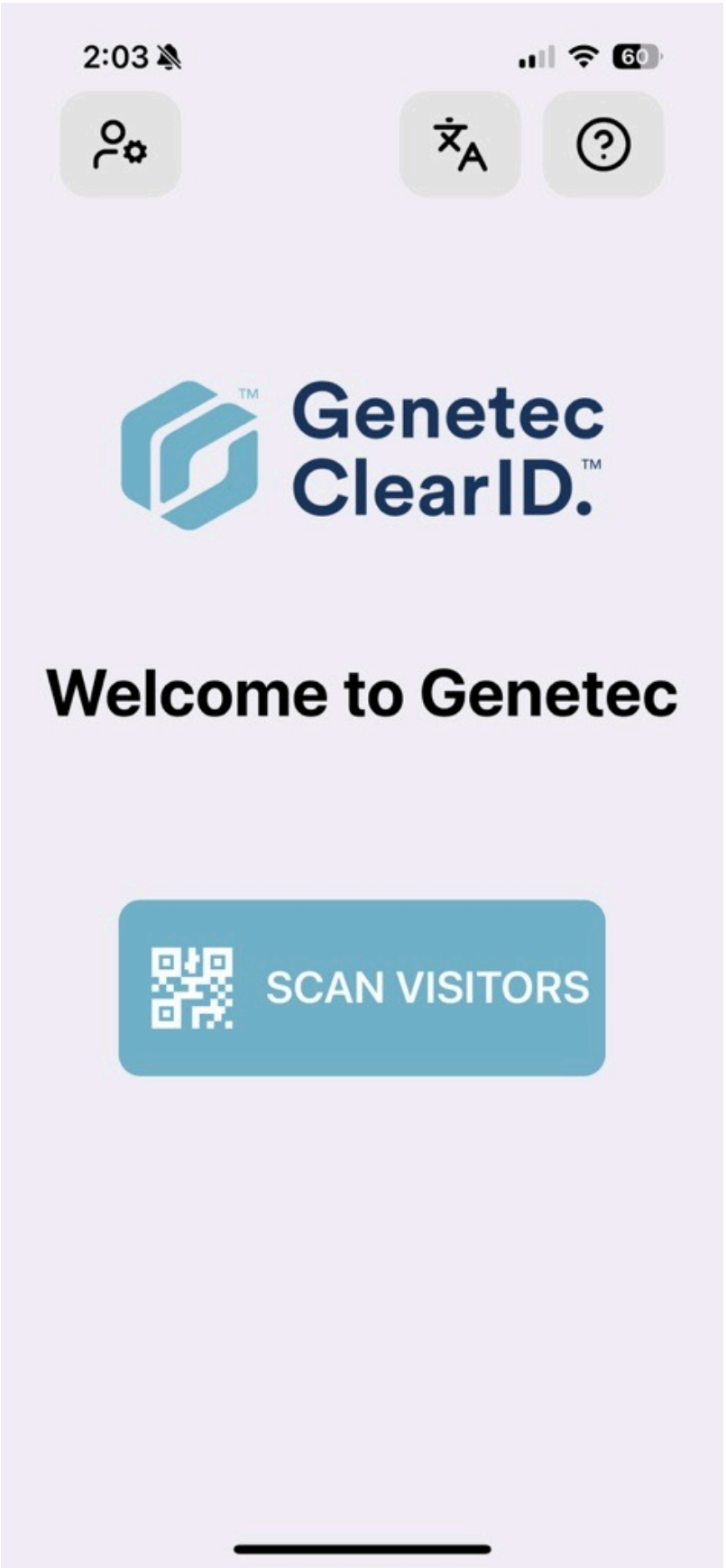
Use this information to help you understand how operators check visitors in and out of events using mobile operator check-in.

Example

NOTE: Visitors can check in up to 1 hour before a visit event.

Mobile operator check-in

Mobile operator check-in is intended for operators in charge of checking in visitors who have been invited or pre-registered. Mobile operator check-in can be active on many iPhones at the same time, making checking into large events quicker by avoiding lineups at self-service kiosks.


2:03
Genetec ClearID.™
Welcome to Genetec
SCAN VISITORS

Operators such as receptionists, security guards, and attendants can quickly check many visitors in at large events. Using the ClearID Self-Service Kiosk app on an iPhone, operators can scan QR codes or search for visitors by name or email.

- Visitors can’t self-register when checked in by an operator.
- Mobile operator check-in doesn't scan IDs, take pictures, or print badges.

Check-in count

Once an operator scans a visitor's QR code, all visit information is displayed, including check-in and check-out options. Using these options, Genetec ClearID™ tracks the number of times visitors enter and leave your event.

Configuring mobile operator check-in

Before you can use mobile operator check-in to check visitors into large events or look up visitor information, you must add an iPhone to Genetec ClearID™. Then you can register and activate the device in the ClearID Self-Service Kiosk mobile app.

Before you begin

- Wi-Fi or cellular data must be enabled on the mobile operator check-in device before activating the device.
- Your device must be running iOS 16.6 or later.

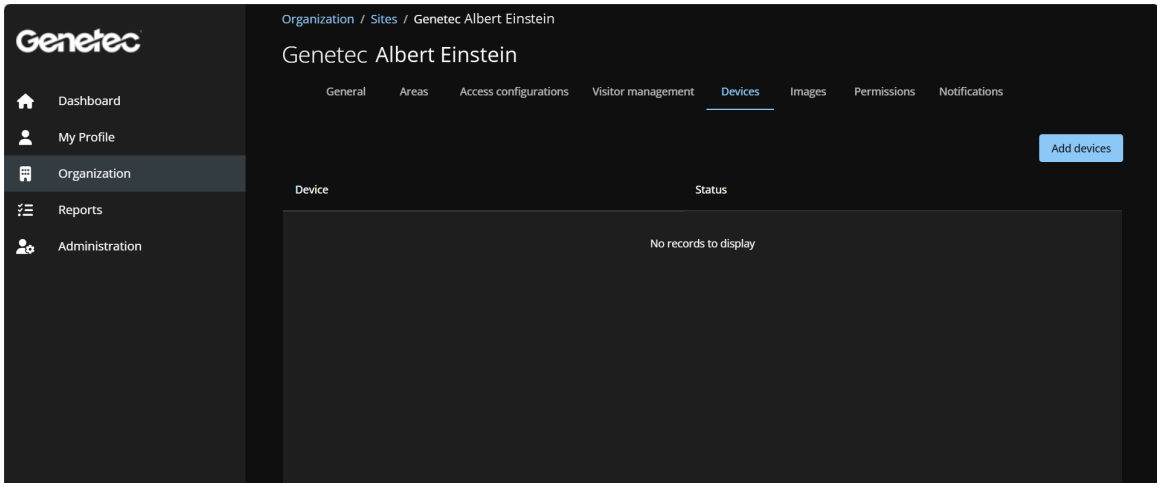
What you should know

- Only an *administrator* or a *Site owner* can generate a device activation code in ClearID.
- You can only activate and associate a mobile operator check-in device with one site at a time.
- iPhones inherit the theme and settings of the self-service kiosk iPads associated with the same site.
- Check-ins using an iPhone don't require visitors to take a photo, print a badge, or acknowledge documents.

Procedure

1 In Genetec ClearID, click **Organization** and select your site.

2 On the *Site* page, click **Devices**.



a) Click **Add devices** to configure your mobile operator check-in device in ClearID.

b) In the *Add devices* dialog, enter a name for the device.

TIP: Consider including the associated site or area in the name to help you easily identify your device in the future.

c) Enter the number of devices that you want to add, and click **Add**.

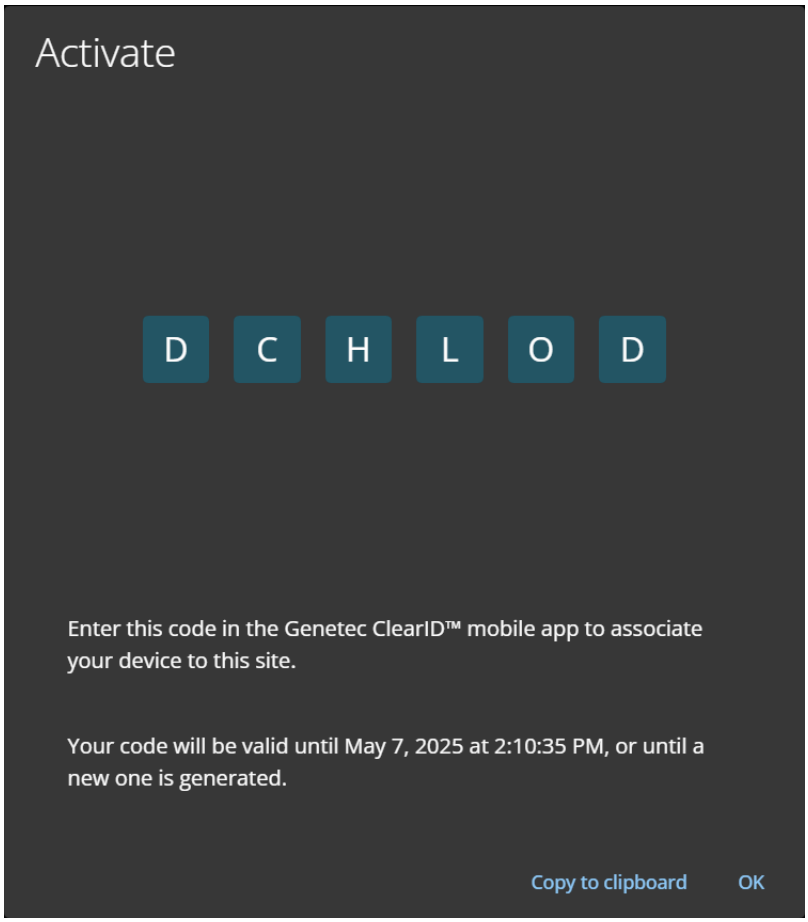
NOTE: You can configure up to 50 devices with a single activation code.

3 Download the ClearID Self Service Kiosk app on the iOS devices that you want to register.

4 Activate your iPhone in ClearID:

a) Select your iPhone from the devices list.

b) In the **Status** field, click **Generate activation code**.



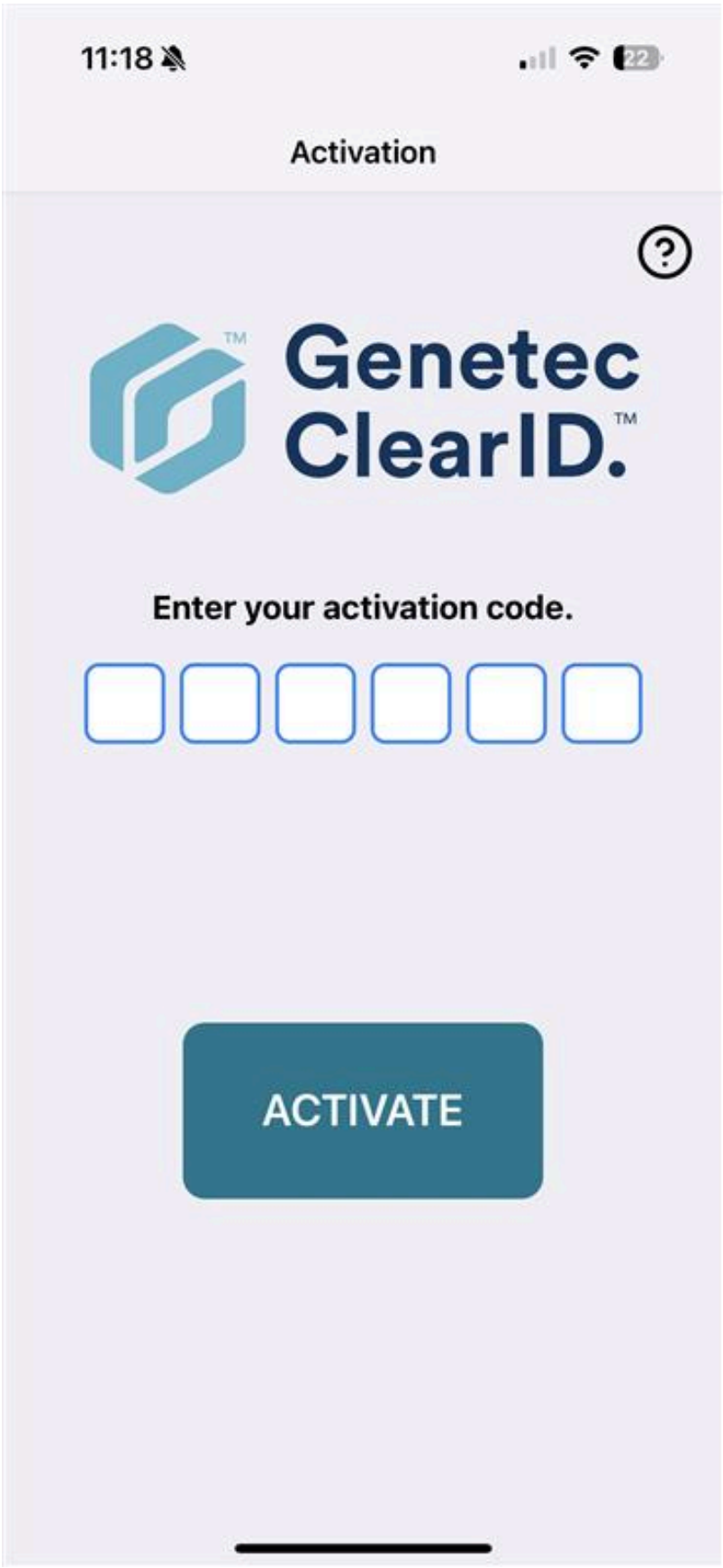
c) Make a note of the activation code for later use.

d) (Optional) Copy to clipboard.

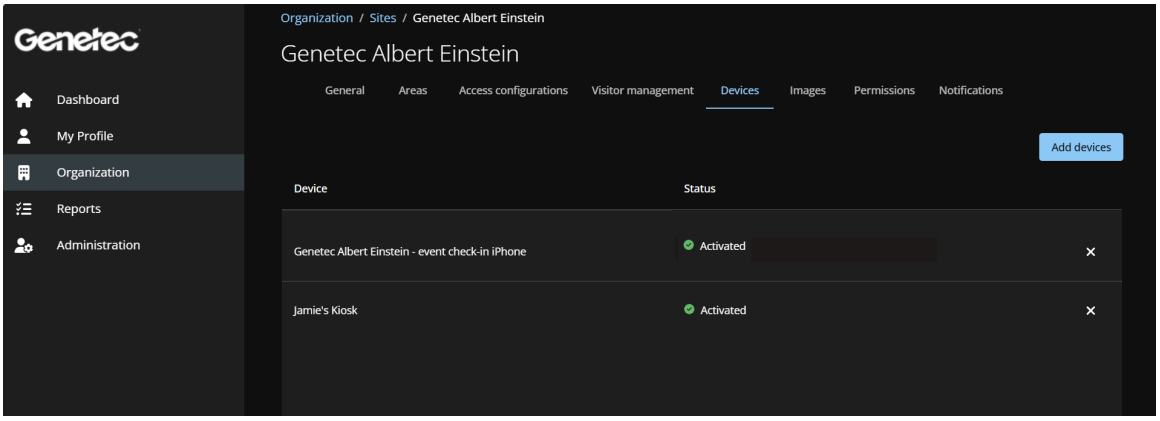
TIP: Use **Copy to clipboard** when the person who registers the ClearID mobile operator check-in device in the ClearID portal is different to the person who activates the device. Once the code is in the clipboard, it can be emailed to the person who activates the device.

e) Click **OK**.

5 In the ClearID Self-Service Kiosk iPhone app, enter your device activation code and tap **Activate**.


11:18
Activation
Genetec ClearID.™
Enter your activation code.
ACTIVATE

Your iPhone is now activated in ClearID and ready for use as a mobile operator check-in device.



Configuring the Self-Service Kiosk label printer (Brother QL-820NWBc, QL-820NWB, or QL-810W)

Before visitors can use the Genetec ClearID™ Self-Service Kiosk to check in, you must configure the label printer so that labels can be printed during the check-in process.

Before you begin

Familiarize yourself with the following:

- Brother QL-810W/820NWB Quick Setup Guide (English)
- Brother QL-810W/QL-820NWB User Guide (English)
- Brother QL-820NWB LED Status indicators

NOTE: The Brother QL-820NWBc replaced the Brother QL-820NWB printer (discontinued). For more information about the differences, see Brother QL-820NWBc Specifications changes.

What you should know

BEST PRACTICE: Use only one label printer per kiosk and pair the printer with the kiosk using Bluetooth.

If you require one label printer to be used with many kiosk devices, or you need the label printer far away from the kiosk devices use Wi-Fi or Ethernet. For example, two kiosks by the entrance and one label printer on the reception desk.

NOTE: A rechargeable Li-ion battery unit (power supply) can also be purchased and used in situations where mains power is unavailable.

Procedure

- Choose one of the following:
  - Configuring Bluetooth mode (Brother QL-820NWBc or QL-820NWB)
  - Configuring Wi-Fi mode (Brother QL-820NWBc, QL-820NWB, or QL-810W)
  - Configuring Ethernet mode (Brother QL-820NWBc or QL-820NWB)

After you finish

From time to time you might need to order supplies, replace the coin cell battery, recharge the optional battery unit (if used), or clean the label printer.

For more information, see *Brother QL-810W/QL-820NWB Quick Setup Guide* and *Brother QL810W/QL-820NWB User Guide*.

Related Topics

Brother QL-820NWB Label Printer FAQs

Brother QL-820NWB printer supplies

Supported devices on page 77
Self-Service Kiosk options on page 615

Configuring the Self-Service Kiosk label printer for Bluetooth mode (Brother QL-820NWBc or QL-820NWB)

Before visitors can use the Genetec ClearID™ Self-Service Kiosk to check in, you must configure the label printer so that labels can be printed during the check-in process.

Before you begin

Familiarize yourself with the following:

- Brother QL-810W/820NWB Quick Setup Guide (English)
- Brother QL-810W/QL-820NWB User Guide (English)
- Brother QL-820NWB LED Status indicators

NOTE: The Brother QL-820NWBc replaced the Brother QL-820NWB printer (discontinued). For more information about the differences, see Brother QL-820NWBc Specifications changes.

What you should know

When using the Brother QL-820NWBc or QL-820NWB label printer in Bluetooth printing mode, the following applies:

- One label printer can be paired with only one kiosk.
- The label printer must be within 30ft of the kiosk.

NOTE: A rechargeable Li-ion battery unit (power supply) can also be purchased and used in situations where mains power is unavailable.

Procedure

1 Plug printer AC adapter into a power outlet and connect the power lead to the label printer.

Figure 16: Brother QL-820NWBc label printer (rear)

Figure 17: Brother QL-820NWB label printer (rear)

2 Press the **Power** button to turn the label printer on.

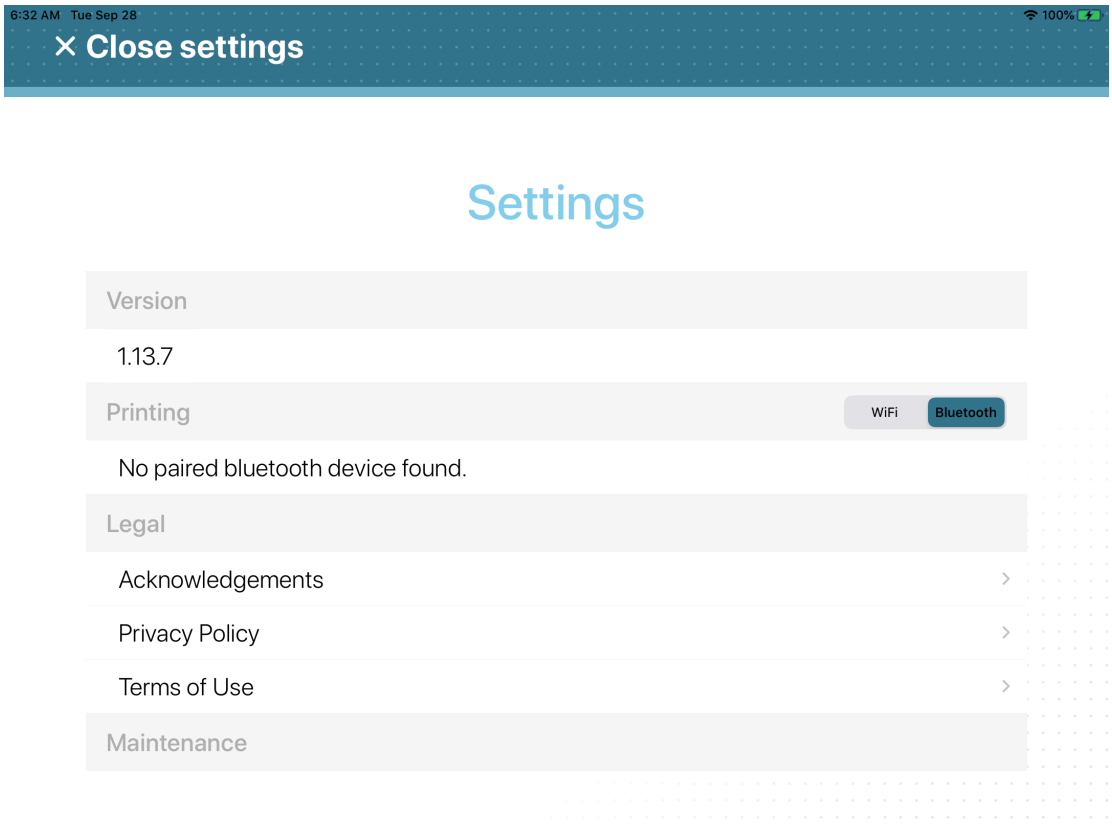
3 (Optional) If you see **Template Mode** menu and the incorrect label size displayed, disable it.

a) Press **Menu**, navigate to **Template Settings** and turn off the **Template Mode** setting.

4 Use the arrow buttons to navigate the label printer menu.

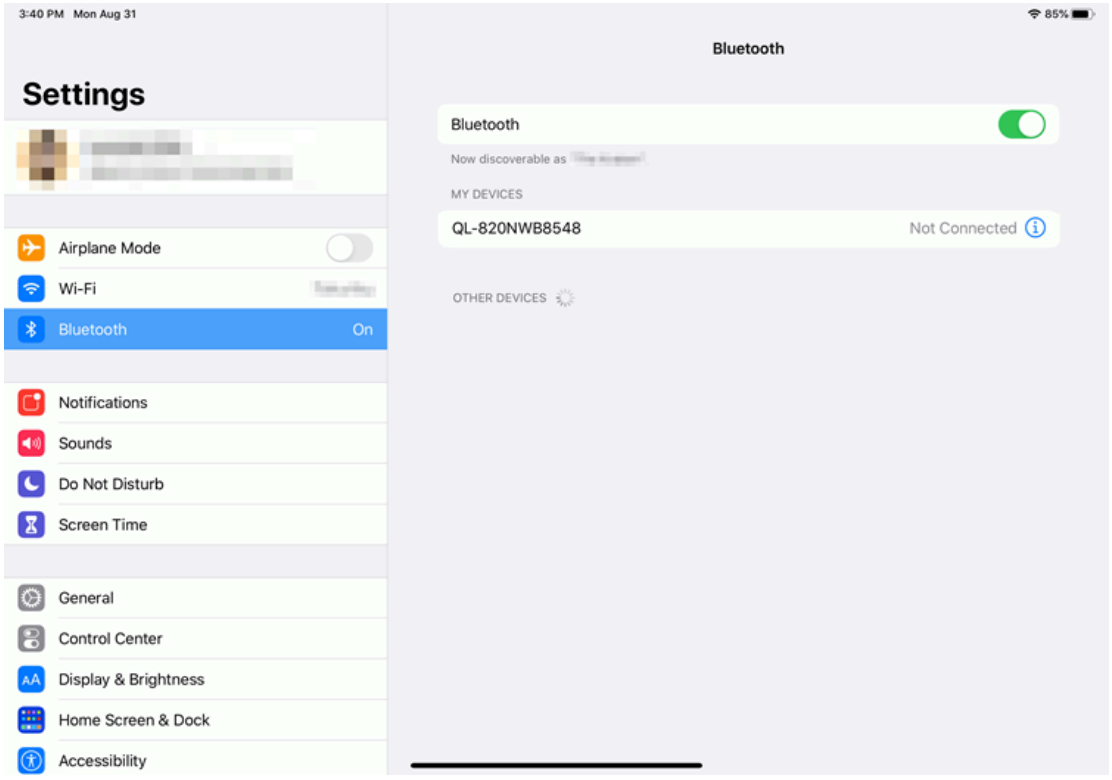
a) Select **Bluetooth** > **Bluetooth (On/Off)** > **On** in the settings menu and press **OK**.
b) Select **Bluetooth** > **Automatic Reconnection (On/Off)** > **On** in the settings menu and press **OK**.

5 Pair your Bluetooth label printer with your ClearID Self-Service Kiosk iPad.
a) In the Self-Service Kiosk mobile app, tap **Settings** ( ).
b) In the *Printing* section, tap the slider control to select **Bluetooth**.



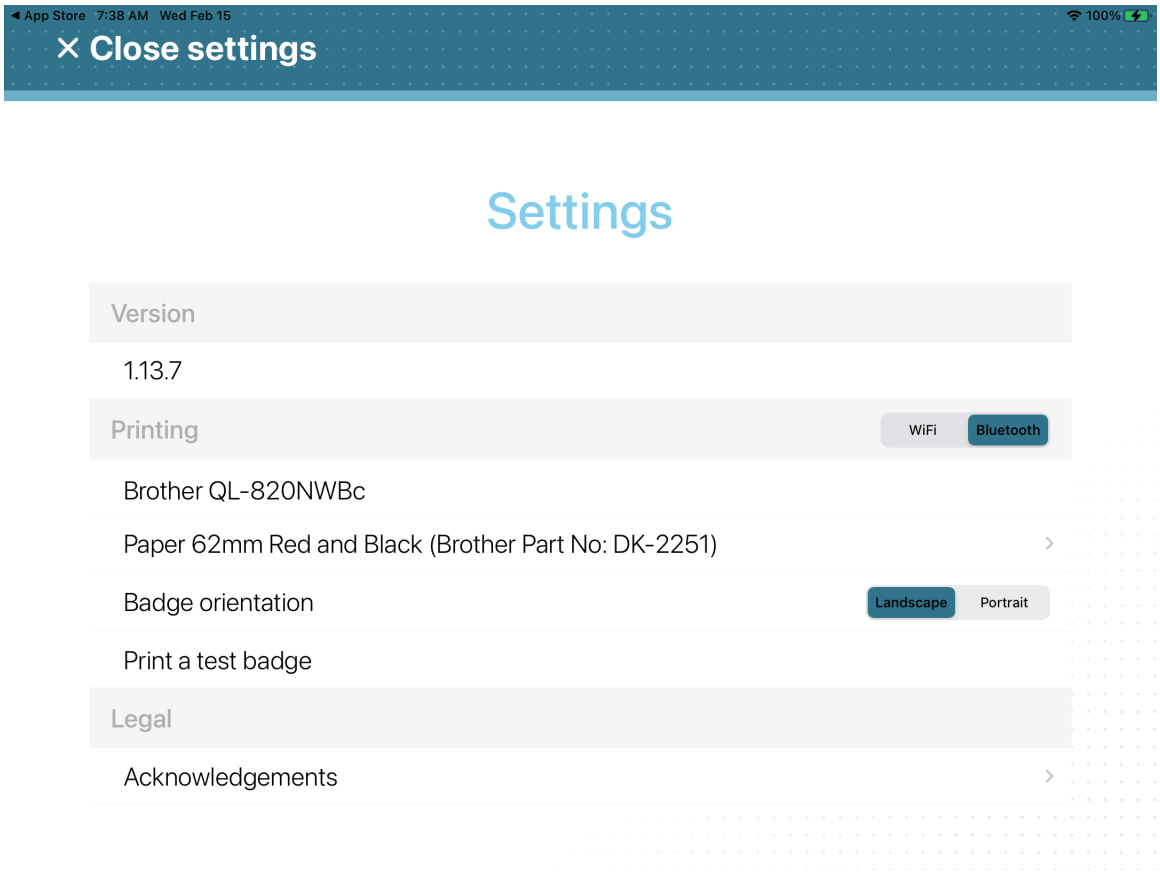
6 On your iPad, navigate to the Apple **Settings** icon, tap **Settings** > **Bluetooth**.

a) (Optional) If **Bluetooth** is disabled, tap the slider to enable Bluetooth.



b) Click the correct printer to pair the ClearID Self-Service Kiosk iPad with your printer.

7 In the Self-Service Kiosk mobile app, tap **Settings** ( ).



a) In the *Printing* section, check that your Brother QL-820NWBc or QL-820NWB printer is displayed.
TIP: If the printer is not displayed or bluetooth is not selected, tap **WiFi** then tap **Bluetooth** to trigger discovery again.

After you finish

(Optional) Print a test badge.

Related Topics

Firewall ports on page 75

Configuring the Self-Service Kiosk label printer for Wi-Fi mode (Brother QL-820NWBc, QL-820NWB, or QL-810W)

Before visitors can use the Genetec ClearID™ Self-Service Kiosk to check in, you must configure the label printer so that labels can be printed during the check-in process.

Before you begin

Familiarize yourself with the following:

- Brother QL-810W/820NWB Quick Setup Guide (English)
- Brother QL-810W/QL-820NWB User Guide (English)
- Brother QL-820NWB LED Status indicators

NOTE: The Brother QL-820NWBc replaced the Brother QL-820NWB printer (discontinued). For more information about the differences, see Brother QL-820NWBc Specifications changes.

What you should know

- One label printer can support up to five self-service kiosks
- The label printer must be on the same Wi-Fi network as the Genetec ClearID™ Self-Service Kiosk iPad.

  The Wi-Fi network must be enabled for use and support the following:

  - Bonjour - required for device search.
  - SNMP - required to check printer status information.
  - UDP or TCP Port 9100 - required to send print data.

NOTE: A rechargeable Li-ion battery unit (power supply) can also be purchased and used in situations where mains power is unavailable.

Procedure

1 Plug printer AC adapter into a power outlet and connect the power lead to the label printer.

Figure 18: Brother QL-820NWBc label printer (rear)

Figure 19: Brother QL-820NWB label printer (rear)

2 Press the **Power** button to turn the label printer on.

3 (Optional) If you see **Template Mode** menu and the incorrect label size displayed, disable it.

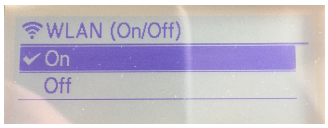
a) Press **Menu**, navigate to **Template Settings** and turn off the **Template Mode** setting.

4 Press the **Menu** button.

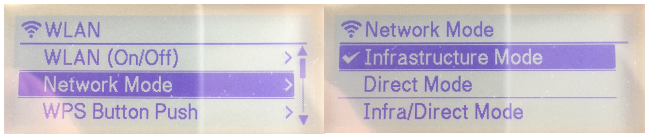
5 Use the arrow buttons to navigate the label printer menu.

6 Scroll down to the **WLAN (5/7)** settings and press **OK**.

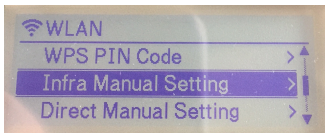
a) Select WLAN **On** and press **OK** .



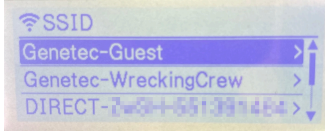
b) In the *Network Mode* menu items, select **Infrastructure Mode** and press **OK**.



7 Scroll down to **Infra Manual Setting** and press **OK**.



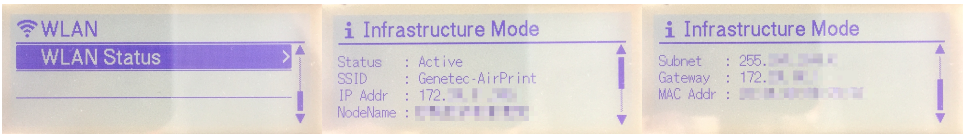
a) After the search completes, scroll down and select your Wi-Fi network from the Service Set Identifier (SSID) list and press **OK**.



NOTE: Typically this network is a Wi-Fi network with AirPrint enabled.

b) When prompted enter the Wi-Fi password.

8 Navigate to **WLAN Status** and press **OK** to verify your Wi-Fi network status and IP address.



TIP: Make a note of the **SSID** (Wi-Fi network) and **IP Addr** (Label Printer IP) for later use.

- The SSID is used to verify that you are on the same Wi-Fi network as the ClearID Self-Service Kiosk iPad.
- The IP address is used later when selecting a label printer to verify you have the correct printer.

9 Select your Wi-Fi label printer.

After you finish

(Optional) Print a test badge.

Related Topics

Firewall ports on page 75

Configuring the Self-Service Kiosk label printer for Ethernet mode (Brother QL-820NWBc or QL-820NWB)

Before visitors can use the Genetec ClearID™ Self-Service Kiosk to check in, you must configure the label printer so that labels can be printed during the check-in process.

Before you begin

Familiarize yourself with the following:

- Brother QL-810W/820NWB Quick Setup Guide (English)
- Brother QL-810W/QL-820NWB User Guide (English)
- Brother QL-820NWB LED Status indicators

NOTE: The Brother QL-820NWBc replaced the Brother QL-820NWB printer (discontinued). For more information about the differences, see Brother QL-820NWBc Specifications changes.

What you should know

- One label printer can support up to five self-service kiosks

NOTE: A rechargeable Li-ion battery unit (power supply) can also be purchased and used in situations where mains power is unavailable.

Procedure

1 Plug printer AC adapter into a power outlet and connect the power lead to the label printer.

Figure 20: Brother QL-820NWBc label printer (rear)

Figure 21: Brother QL-820NWB label printer (rear)

2 Make sure that the printer is turned **OFF** before connecting the LAN cable.

Figure 22: Brother QL-820NWBc label printer (rear)

Figure 23: Brother QL-820NWB label printer (rear)

a) Connect a LAN cable to the LAN port on the back of the printer.

TIP: Use a straight-through Category 5 (or greater) twisted-pair cable for 10BASE-T or 100BASE-TX Fast Ethernet Network.

3 Press the **Power** button to turn the label printer on.

4 (Optional) If you see **Template Mode** menu and the incorrect label size displayed, disable it.

a) Press **Menu**, navigate to **Template Settings** and turn off the **Template Mode** setting.

5 Select your label printer (Ethernet).

After you finish

(Optional) Print a test badge.

Related Topics

Firewall ports on page 75

Configuring the Self-Service Kiosk label printer (Brother TD-4550DNWB)

Before visitors can use the Genetec ClearID™ Self-Service Kiosk to check in, you must configure the Brother TD-4550DNWB label printer so that labels can be printed during the check-in process.

Before you begin

Familiarize yourself with the following:

- Brother TD-4550DNWB Quick Setup Guide
- Brother TD-4550DNWB User Guide
- Brother TD-4550DNWB online User Guide (HTML)
- Brother TD-4550DNWB LED status indicators

What you should know

BEST PRACTICE: Use only one label printer per kiosk and pair the printer with the kiosk using Bluetooth.
If you require one label printer to be used with many kiosk devices, or you need the label printer far away from the kiosk devices use Wi-Fi or Ethernet. For example, two kiosks by the entrance and one label printer on the reception desk.

Procedure

- Choose one of the following:
  - Configuring Bluetooth mode (Brother TD-4550DNWB)
  - Configuring Wi-Fi mode (Brother TD-4550DNWB)
  - Configuring Ethernet mode (Brother TD-4550DNWB)

After you finish

From time to time you might need to order supplies, replace the coin cell battery, or clean the label printer.

For more information, see *Brother TD-4550DNWB Quick Setup Guide* and *Brother TD-4550DNWB User Guide*.

Related Topics

Brother TD-4550DNWB Label Printer FAQs
Brother TD-4550DNWB printer supplies
Supported devices on page 77

Configuring the Self-Service Kiosk label printer for Bluetooth mode (Brother TD-4550DNWB)

Before visitors can use the Genetec ClearID™ Self-Service Kiosk to check in, you must configure the label printer so that labels can be printed during the check-in process.

Before you begin

Familiarize yourself with the following:

- Brother TD-4550DNWB Quick Setup Guide
- Brother TD-4550DNWB User Guide
- Brother TD-4550DNWB online User Guide (HTML)
- Brother TD-4550DNWB LED status indicators

What you should know

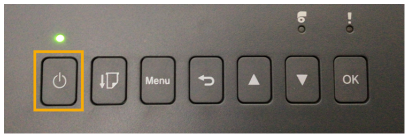
When using the Brother TD-4550DNWB label printer in Bluetooth printing mode, the following applies:

- One label printer can be paired with only one kiosk.
- The label printer must be within 30ft of the kiosk.

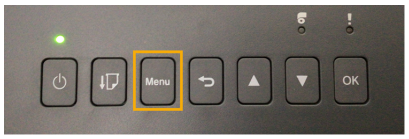
Procedure

1 Plug printer AC adapter into a power outlet and connect the power lead to the label printer.

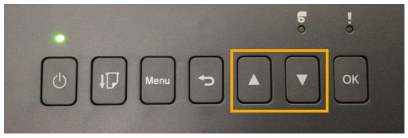
2 Press the **Power** button to turn the label printer on.



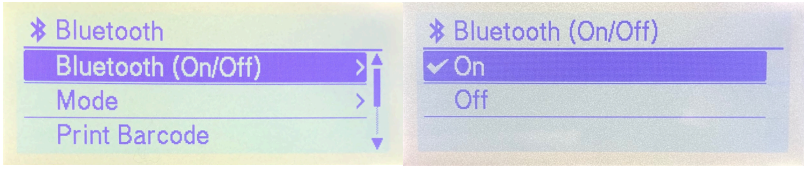
3 Press the **Menu** button.



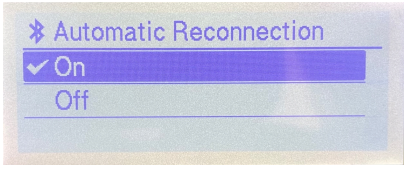
4 Use the arrow buttons to navigate the label printer menu.



a) Select **BLUETOOTH** > **BLUETOOTH (On/Off)** > **On** in the settings menu and press **OK**.



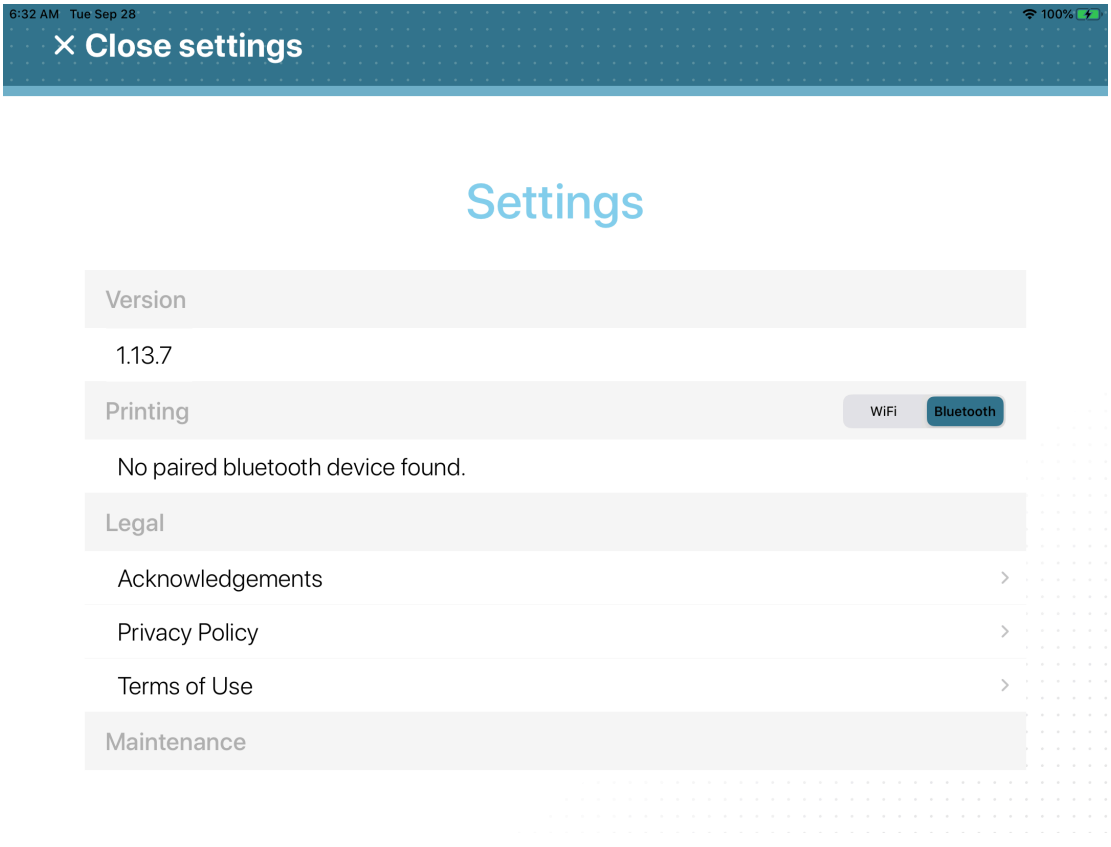
b) Select **BLUETOOTH** > **Automatic Reconnection (On/Off)** > **On** in the settings menu and press **OK**.



5 Pair your Bluetooth label printer with your ClearID Self-Service Kiosk iPad.

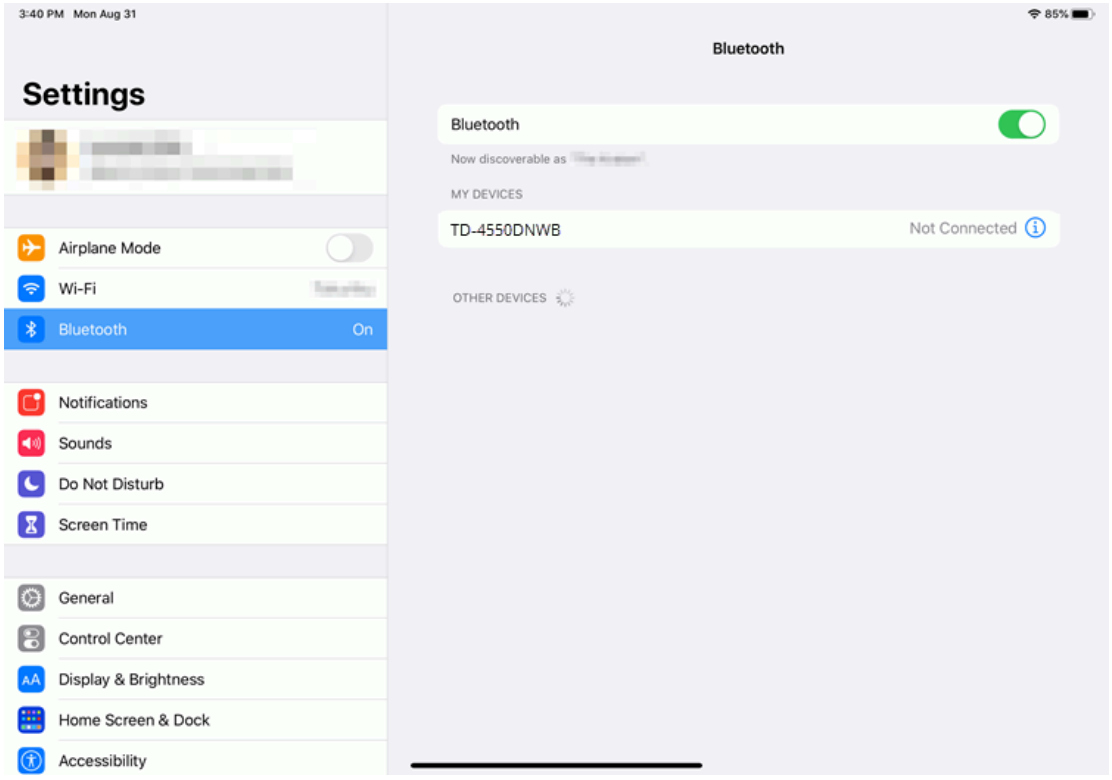
a) In the Self-Service Kiosk mobile app, tap **Settings** ( ).

b) In the *Printing* section, tap the slider control to select **Bluetooth**.



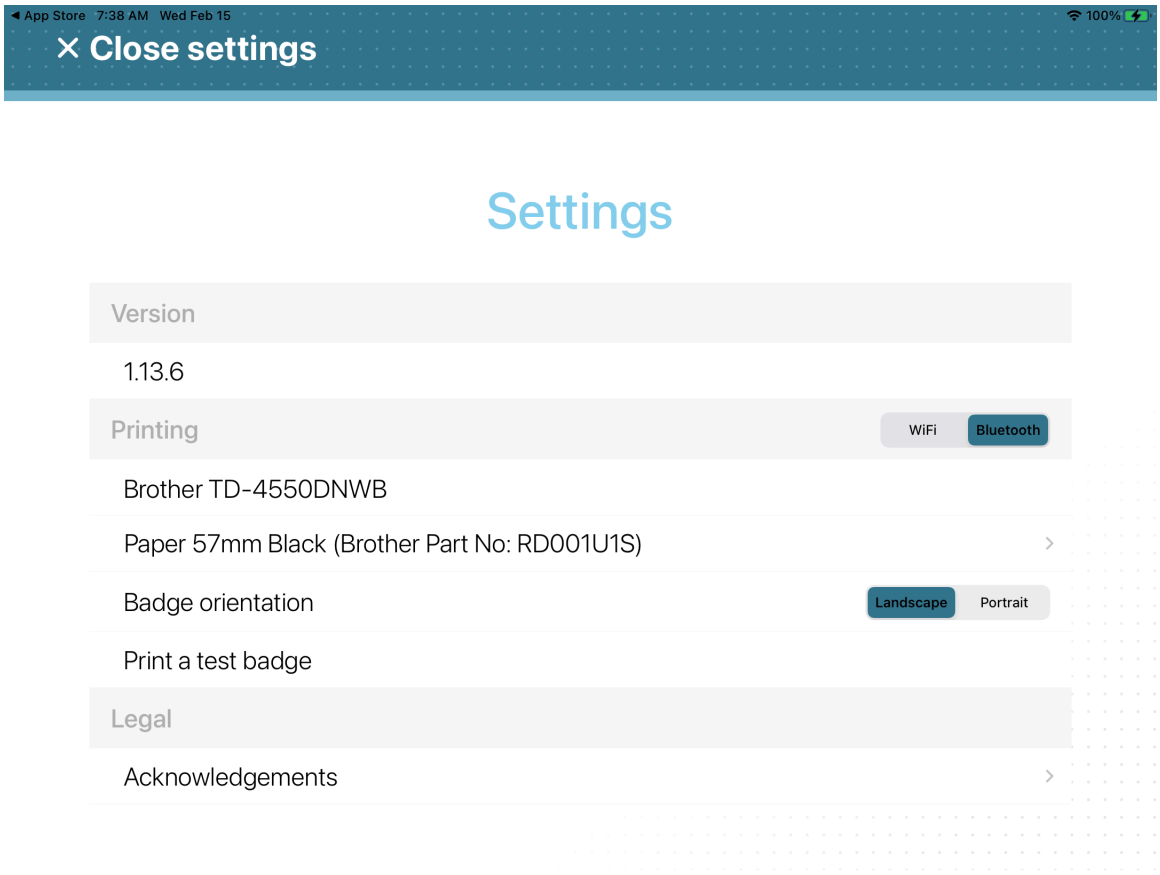
6 On your iPad, navigate to the Apple **Settings** icon, tap **Settings** > **Bluetooth**.

a) (Optional) If **Bluetooth** is disabled, tap the slider to enable Bluetooth.



b) Click the correct printer to pair the ClearID Self-Service Kiosk iPad with your printer.

7 In the Self-Service Kiosk mobile app, tap **Settings** ( ).



a) In the *Printing* section, check that your Brother TD-4550DNWB printer is displayed.
TIP: If the printer is not displayed or bluetooth is not selected, tap **WiFi** then tap **Bluetooth** to trigger discovery again.

After you finish

(Optional) Print a test badge.

Related Topics

Firewall ports on page 75

Configuring the Self-Service Kiosk label printer for Wi-Fi mode (Brother TD-4550DNWB)

Before visitors can use the Genetec ClearID™ Self-Service Kiosk to check in, you must configure the label printer so that labels can be printed during the check-in process.

Before you begin

Familiarize yourself with the following:

- Brother TD-4550DNWB Quick Setup Guide
- Brother TD-4550DNWB User Guide
- Brother TD-4550DNWB online User Guide (HTML)
- Brother TD-4550DNWB LED status indicators

What you should know

- One label printer can support up to five self-service kiosks
- The label printer must be on the same Wi-Fi network as the Genetec ClearID™ Self-Service Kiosk iPad.

  The Wi-Fi network must be enabled for use and support the following:

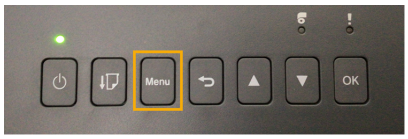
  - Bonjour - required for device search.
  - SNMP - required to check printer status information.
  - UDP or TCP Port 9100 - required to send print data.

Procedure

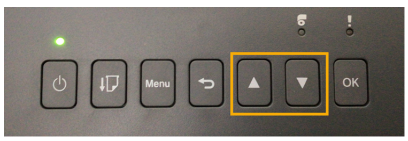
1 Plug printer AC adapter into a power outlet and connect the power lead to the label printer.

2 Press the **Power** button to turn the label printer on.

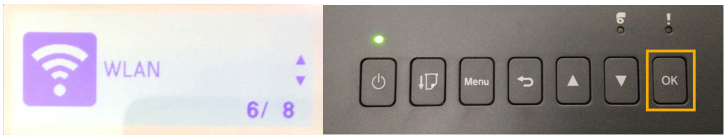
3 Press the **Menu** button.



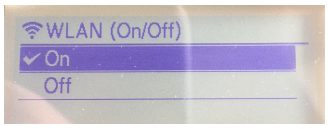
4 Use the arrow buttons to navigate the label printer menu.



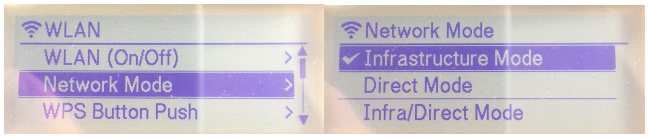
5 Scroll down to the **WLAN (6/8)** settings and press **OK**.



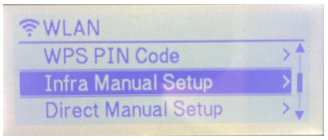
a) Select WLAN **WLAN (On/Off)** > **On** and press **OK** .



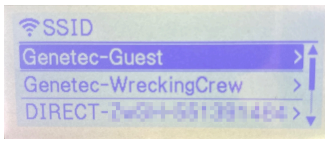
b) In the *Network Mode* menu items, select **Infrastructure Mode** and press **OK**.



6 Scroll down to **Infra Manual Setup** and press **OK**.



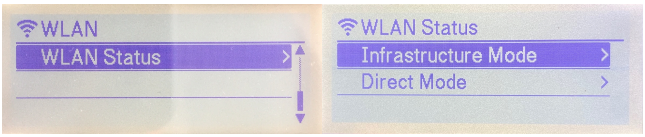
a) After the search completes, scroll down and select your Wi-Fi network from the Service Set Identifier (SSID) list and press **OK**.

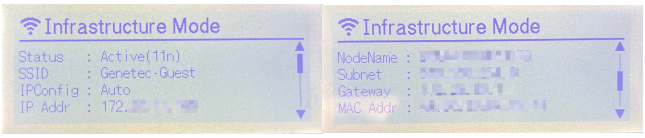


NOTE: Typically this network is a Wi-Fi network with AirPrint enabled.

b) When prompted enter the Wi-Fi password.

7 Navigate to **WLAN Status** > **Infrastructure Mode** and press **OK** to verify your Wi-Fi network status and IP address.





TIP: Make a note of the **SSID** (Wi-Fi network) and **IP Addr** (Label Printer IP) for later use.

- The SSID is used to verify that you are on the same Wi-Fi network as the ClearID Self-Service Kiosk iPad.
- The IP address is used later when selecting a label printer to verify you have the correct printer.

8 Select your label printer (Wi-Fi).

After you finish

(Optional) Print a test badge.

Related Topics

Firewall ports on page 75

Configuring the Self-Service Kiosk label printer for Ethernet mode (Brother TD-4550DNWB)

Before visitors can use the Genetec ClearID™ Self-Service Kiosk to check in, you must configure the label printer so that labels can be printed during the check-in process.

Before you begin

Familiarize yourself with the following:

- Brother TD-4550DNWB Quick Setup Guide
- Brother TD-4550DNWB User Guide
- Brother TD-4550DNWB online User Guide (HTML)
- Brother TD-4550DNWB LED status indicators

What you should know

- One label printer can support up to five self-service kiosks

IMPORTANT: Do not connect this product to any LAN connection that is subject to overvoltages.

Procedure

1 Plug printer AC adapter into a power outlet and connect the power lead to the label printer.

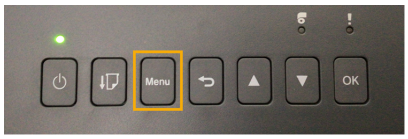
2 Make sure that the printer is turned **OFF** before connecting the LAN cable.

a) Connect a LAN cable to the LAN port on the back of the printer.

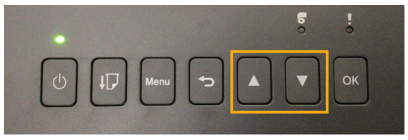
TIP: Use a straight-through Category 5 (or greater) twisted-pair cable for 10BASE-T or 100BASE-TX Fast Ethernet Network.

3 Press the **Power** button to turn the label printer on.

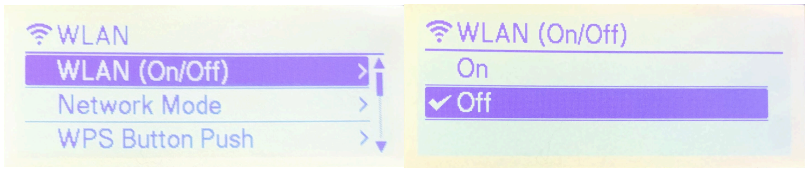
4 Press the **Menu** button.



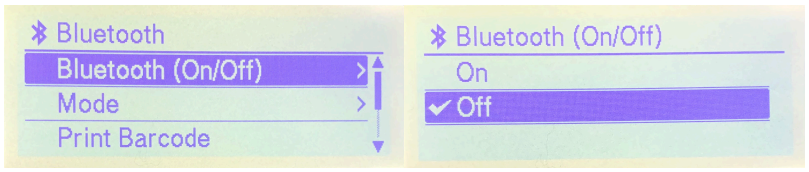
5 Use the arrow buttons to navigate the label printer menu.



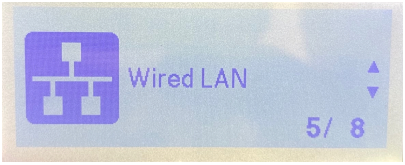
6 From the label printer **Settings** menu, turn OFF **WLAN** (Wi-Fi).



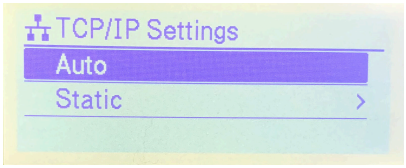
7 From the label printer **Settings** menu, turn OFF **Bluetooth**.



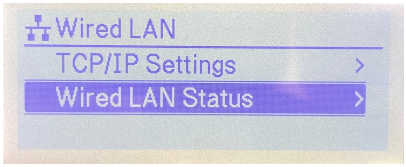
8 Scroll down to the **Wired LAN (5/8)** settings and press **OK**.



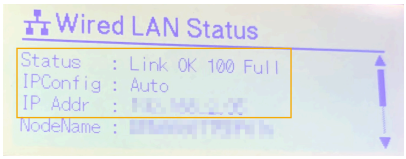
a) Click **TCP/IP Settings** and select **AUTO**.



b) Click **Wired LAN Status** to check your printer.



c) Check your connection **Status**, **IPConfig**, and **IP Addr**.



TIP: Make a note of your IP address and other settings for later use when selecting your printer.

9 Select your label printer (Ethernet).

After you finish

(Optional) Print a test badge.

Related Topics

Firewall ports on page 75

Selecting a Self-Service Kiosk label printer

Before you can print visitor badges from the Genetec ClearID™ Self-Service Kiosk, you must select a label printer.

Before you begin

Do one of the following:

- Configure the Brother QL-820NWBc or QL-820NWB Self-Service Kiosk Label Printer
- Configure the Brother TD-4550DNWB Self-Service Kiosk Label Printer

What you should know

Wi-Fi or Ethernet only: Make sure that you have the IP address of the label printer so that you can verify your selection.

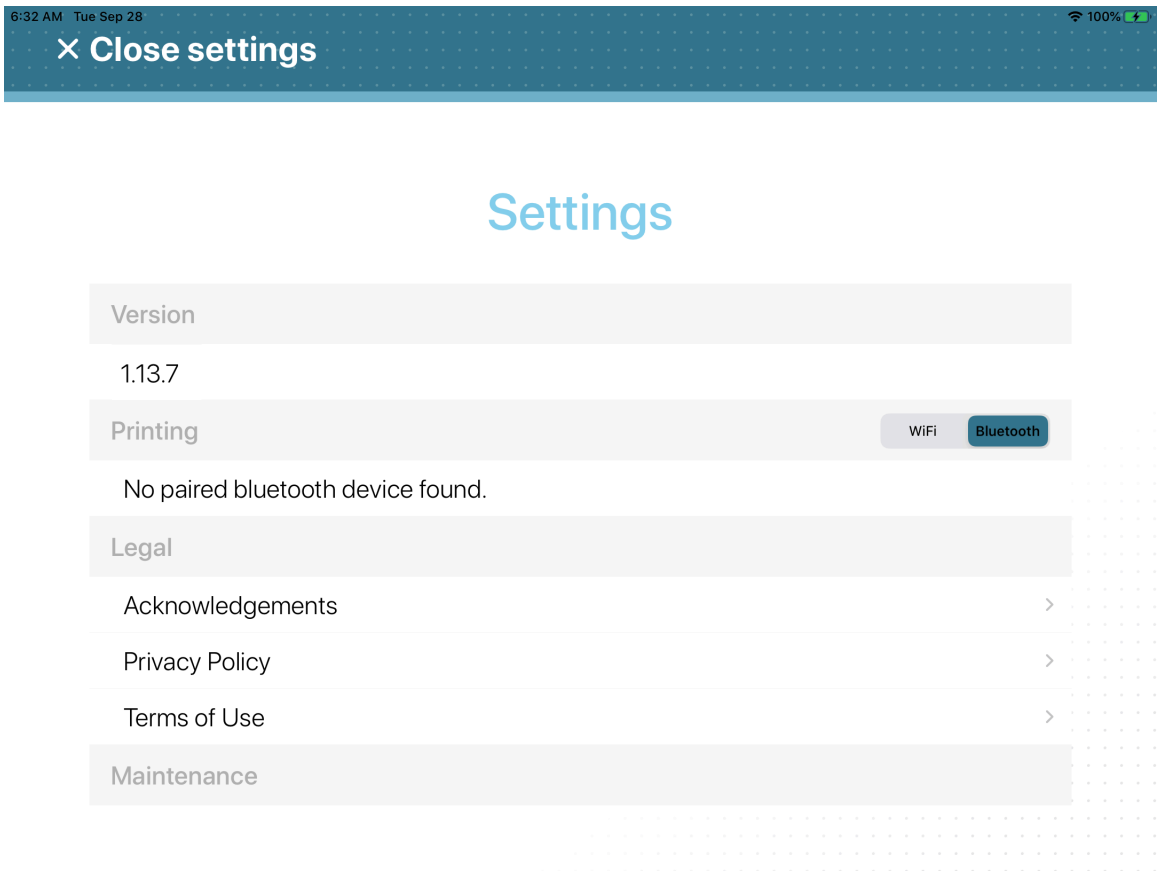
Procedure

To select a Bluetooth kiosk label printer:

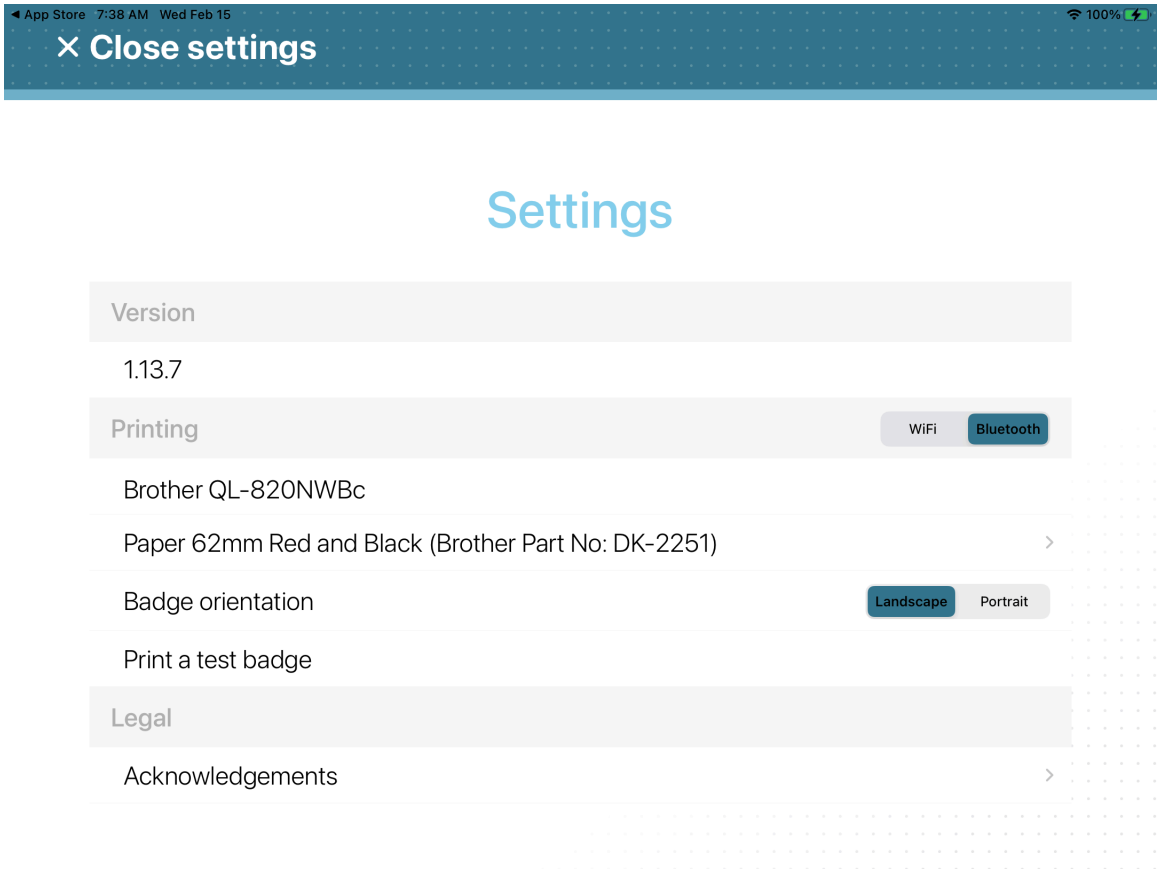
1 In the Self-Service Kiosk mobile app, tap **Settings** ( ).

2 On the **Settings** page, tap **Bluetooth** to select the printing mode you require.

a) If requested, enter your user authentication details.



3 If you selected **Bluetooth**, in the **Printing** section, your selected printer should be displayed.



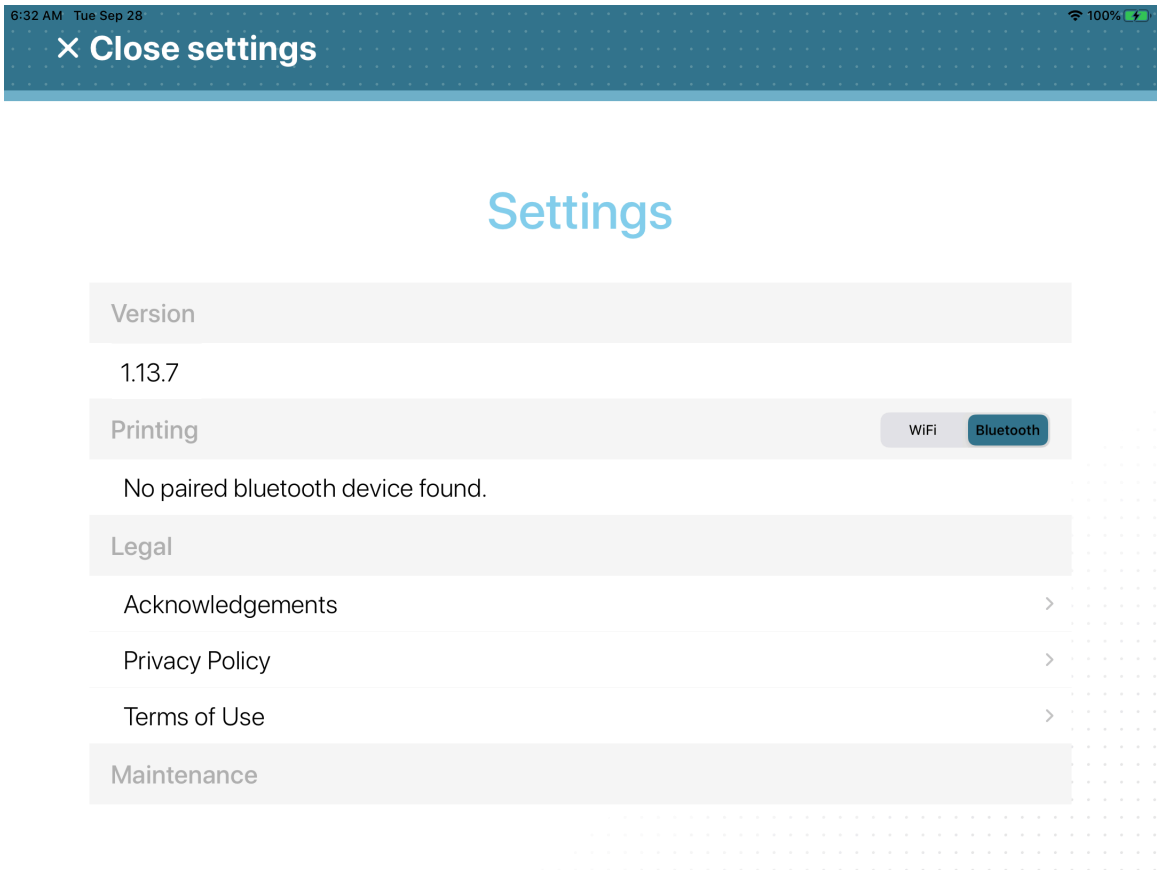
TIP: Bluetooth mode: If the printer is not displayed or bluetooth is not selected, tap **WiFi** then tap **Bluetooth** to trigger discovery again.

4 Tap **Close settings** to complete your printer selection setup.

To select a Wi-Fi kiosk label printer:

1 In the Self-Service Kiosk mobile app, tap **Settings** ( ).

2 On the **Settings** page, tap **WiFi** to select the printing mode you require.
a) If requested, enter your user authentication details.



3 Choose one of the following:

- **Discover WiFi printer**
- **Set printer manually (IP address)**

a) If you selected **Discover WiFi printer**, wait for the **Printers** list to be displayed then select your printer.

Verify that the IP address of the printer you are selecting matches the IP address seen during printer configuration.

TIP: Wi-Fi mode: If the printer is not displayed or Wi-Fi is not selected, tap **Bluetooth** then tap **WiFi** to trigger discovery again.

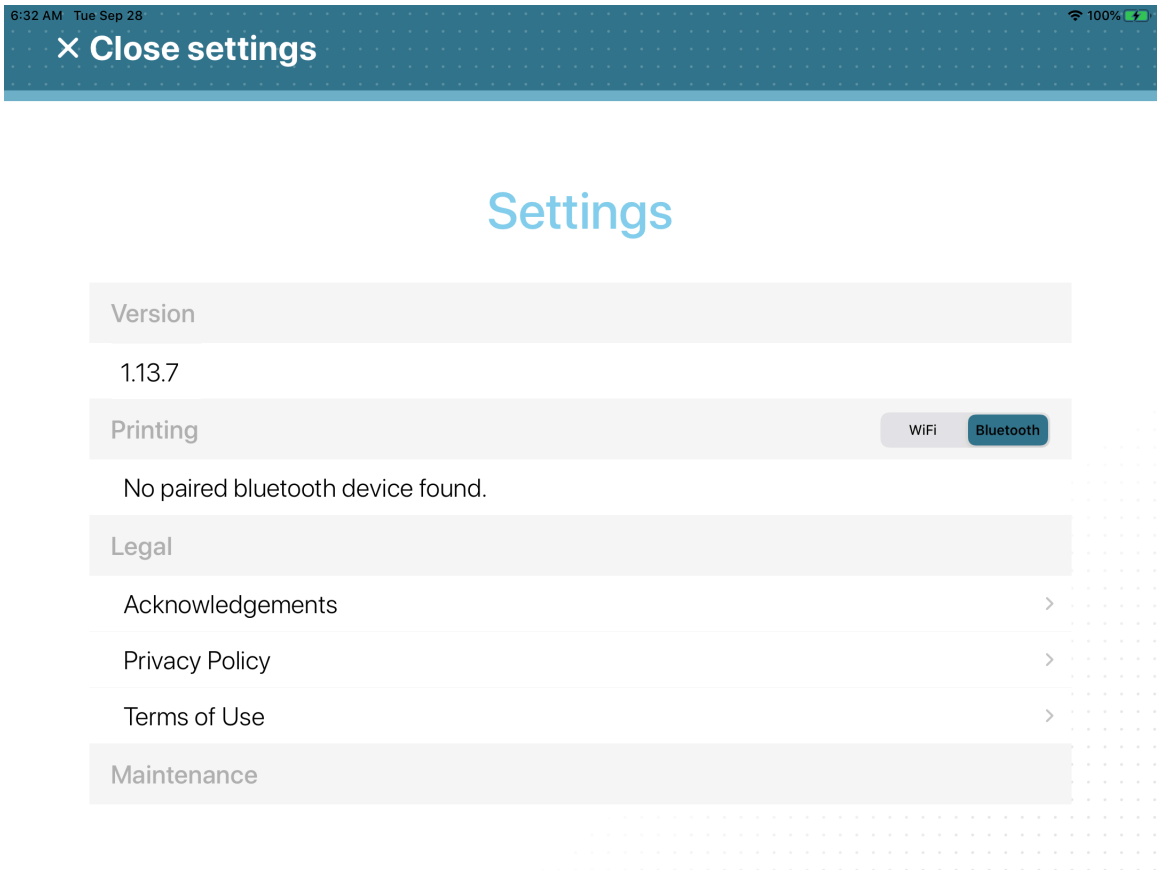
b) If you selected **Set printer manually (IP address)**, enter the IP address of the printer and tap **Save**.

4 Tap **Close settings** to complete your printer selection setup.

To select an Ethernet kiosk label printer:

1 In the Self-Service Kiosk mobile app, tap **Settings** ( ).

2 On the **Settings** page, tap **WiFi** to select the printing mode you require.
a) If requested, enter your user authentication details.



3 Choose one of the following:

- **Discover WiFi printer**
- **Set printer manually (IP address)**

a) If you selected **Discover WiFi printer**, wait for the **Printers** list to be displayed then select your printer.

Verify that the IP address of the printer you are selecting matches the IP address seen during printer configuration.

TIP: Wi-Fi mode: If the printer is not displayed or Wi-Fi is not selected, tap **Bluetooth** then tap **WiFi** to trigger discovery again.

b) If you selected **Set printer manually (IP address)**, enter the IP address of the printer and tap **Save**.

4 Tap **Close settings** to complete your printer selection setup.

After you finish

Print a test badge.

Printing a test badge from the Self-Service Kiosk

To help you understand if the printer is working as expected, you can print a test badge. This test print can be performed either after first initial setup or after replacing a label roll.

Before you begin

- Select a kiosk label printer.
- Make sure that labels are loaded in the printer.
- Make sure that labels are correctly aligned.

What you should know

The Brother QL-820NWBc, QL-820NWB, and QL-810W label printers can print either **Black** or **Red and Black** badges:

- 62mm Black (Brother Part No: DK-2205)
- 62mm Red and Black (Brother Part No: DK-2251)

The Brother TD-4550DNWB label printer can only print **Black** badges:

- 57mm Black (Brother Part No: RD001U1S)
  IMPORTANT: The labels for the Brother TD-4550DNWB printer MUST be orientated correctly otherwise badge printing issues can occur.

Badges can be printed in either *Portrait* or *Landscape* format.

Procedure

1 In the Genetec ClearID™ Self-Service Kiosk mobile app, tap settings ( ).

2 In the *Settings page*, tap **Print a test badge**.

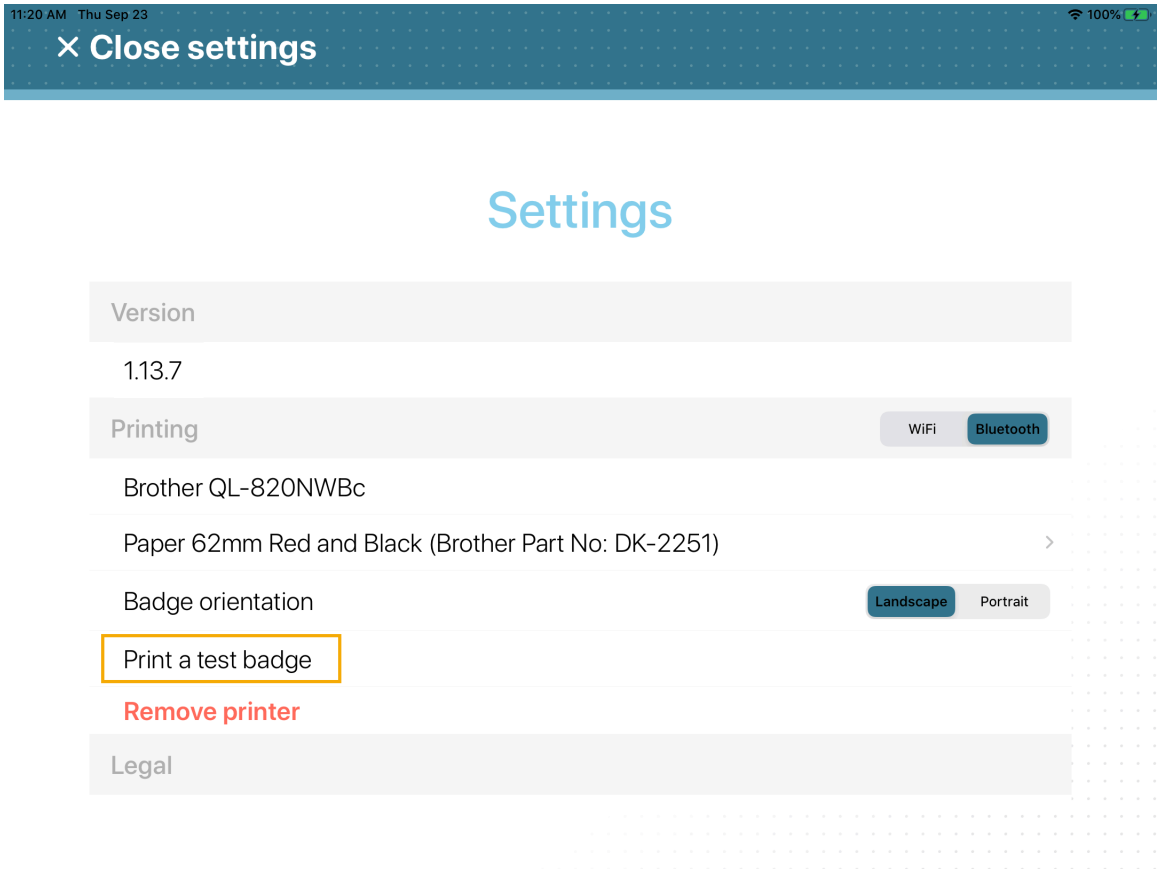


Figure 24: Settings page - Brother QL-820NWBc printer

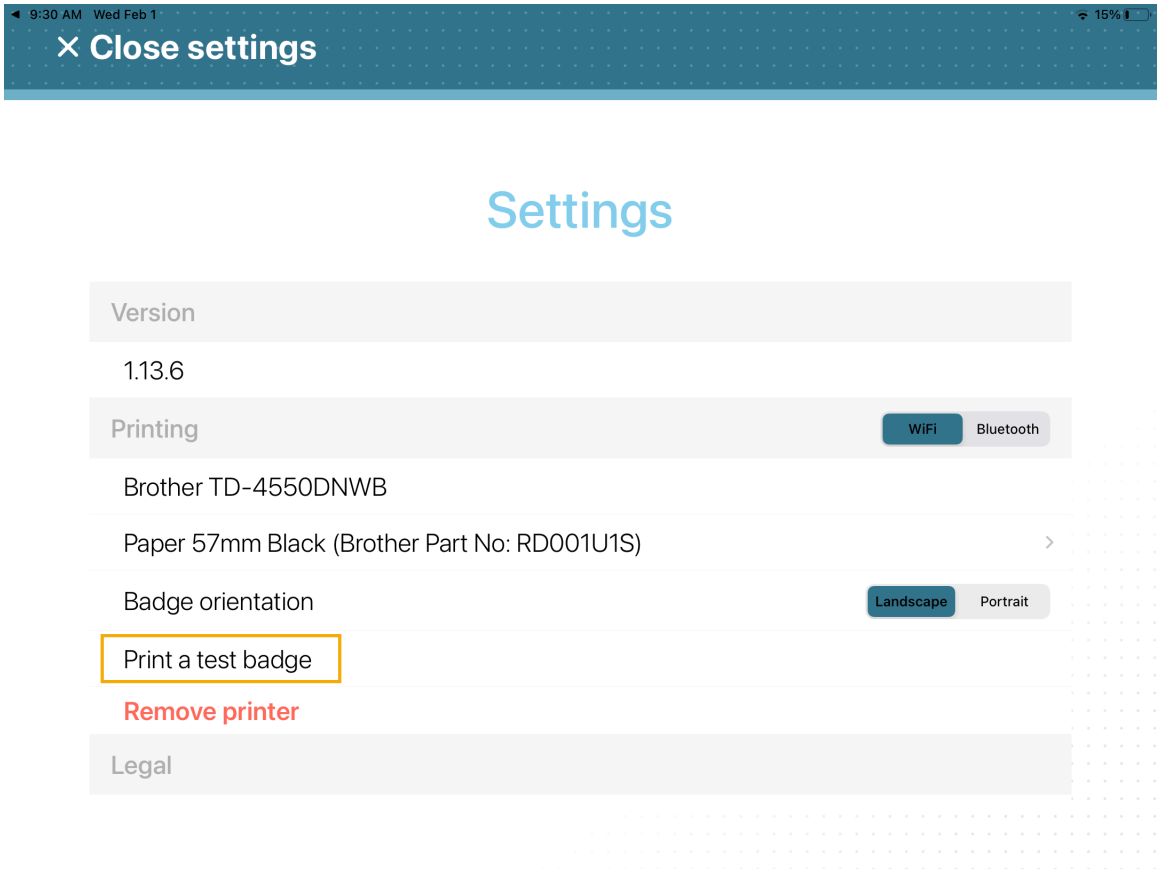
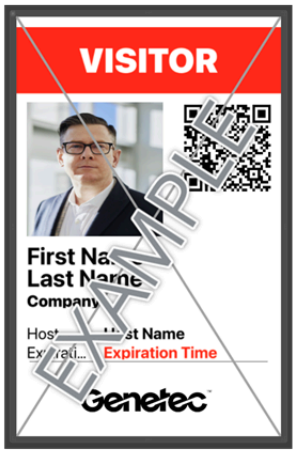


Figure 25: Settings page - Brother TD-4550DNWB printer

3 Collect and examine your test badge.



Badge dimensions: **10 x 6.1 cm's** or **3.94 x 2.56 inches**.

NOTE: When printing to a Brother TD-4550DNWB label printer, your badges are printed in black and white.

You are now ready for visitors to use the ClearID Self-Service Kiosk and print their own visitor badges during their check-in.

After you finish

From time to time you might need to order supplies, replace the coin cell battery, recharge the optional battery unit (Brother QL-820NWBc or QL-820NWB only), or clean the label printer.

For more information, see the third-party user guide documentation for your printer.

Related Topics

Self-Service Kiosk label printer issues on page 668

Resetting the Self-Service Kiosk mobile app

In some situations, you might need to perform a hard reset of the Genetec ClearID™ Self-Service Kiosk mobile app. For example, if you encounter issues with selecting the label printer, printing labels, listing people, or if you want to move the kiosk to another site.

Before you begin

- Make sure that you have your Apple ID information.
- Make sure that you have your Wi-Fi network information.

What you should know

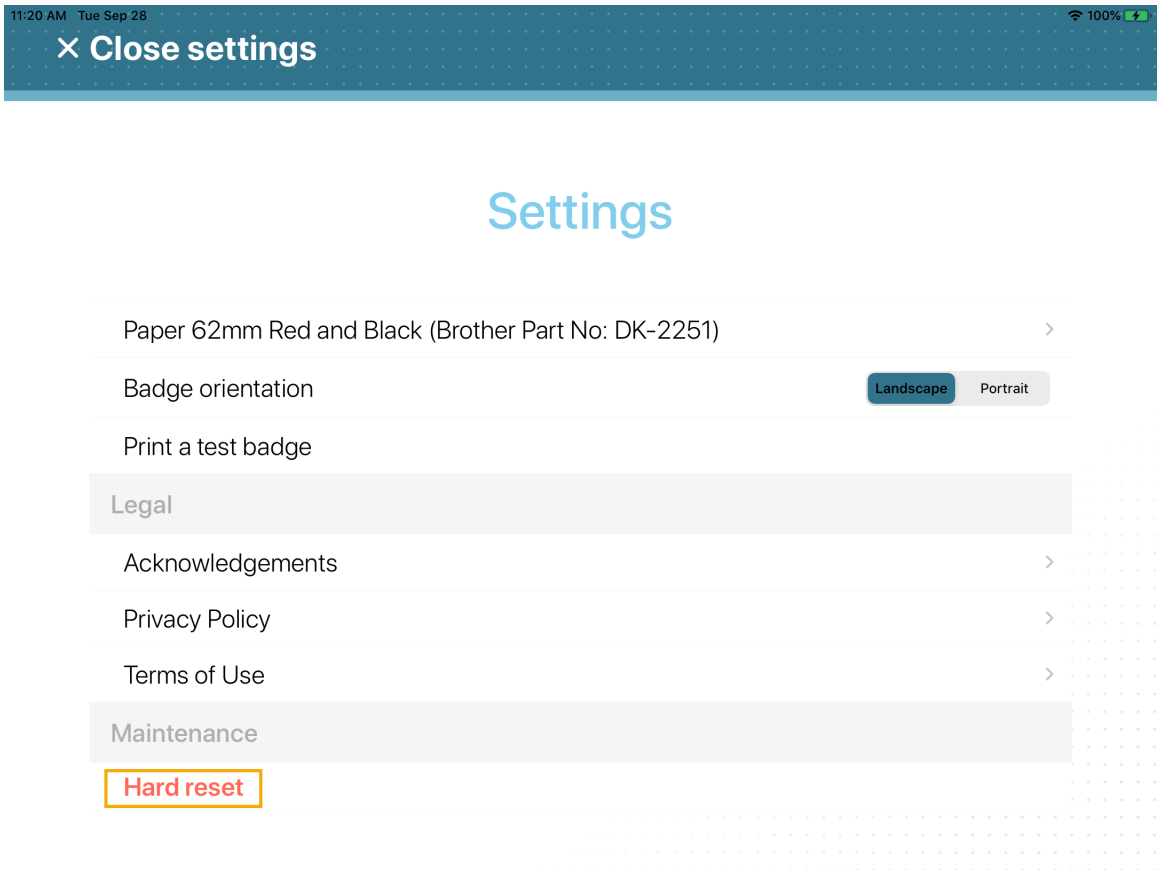
- Only an *administrator* or a *Site owner* can generate a device activation code in ClearID.

CAUTION: The hard reset action erases all application data, user data, and visit, check-in, check-out information from the Kiosk device and performs a hard reset of the mobile app. If you proceed, you must register the kiosk device again.

Procedure

1 In the Self-Service Kiosk mobile app, tap **Settings** ( ).

2 In the *Settings page*, scroll to the bottom of the page and in the *Maintenance* section tap **Hard reset**.



3 Configure your Self-Service Kiosk iPad.

4 Configure your Self-Service Kiosk label printer.

5 Select your Self-Service Kiosk label printer.

6 Print a test badge.

Your Self-Service Kiosk is now ready for use.

Related Topics

Self-Service Kiosk label printer issues on page 668

Self-Service Kiosk options

Use the following information to help you understand the Genetec ClearID™ Self-Service Kiosk options that are available.

Item description	Part	
Kiosk tabletop stand Apple iPad 10.9 inch (Wi-Fi) with Apple Care Table top kiosk kit (Printer not included) **NOTE:** Depending on your check-in requirements, the kiosk iPad housing can be configured on this floor stand for use in either *Portrait* or *Landscape* mode.	• CD-KIOSK-TABLETOP-KIT-V2[1]	
Kiosk floor stand Apple iPad 10.9 inch (Wi-Fi) with Apple Care Floor stand kit (Printer not included) **NOTE:** Depending on your check-in requirements, the kiosk iPad housing can be configured on this floor stand for use in either *Portrait* or *Landscape* mode.	• CD-KIOSK-FLOORSTAND-KIT-V2[1]	
Visitor label printer Brother QL-820NWBc thermal printer • Network (Ethernet), Wi-Fi, and Bluetooth • Prints black and red labels **NOTE:** Only the Brother DK Roll - 62mm Black (Brother Part No: DK-2205) or 62mm Red and Black (Brother Part No: DK-2251) labels are supported.	Brother QL-820NWBc Kit part numbers: • CD-KIOSK-PRINTER-AU-KIT • CD-KIOSK-PRINTER-BRA-KIT • CD-KIOSK-PRINTER-EU-KIT • CD-KIOSK-PRINTER-NA-KIT • CD-KIOSK-PRINTER-UK-KIT	
Visitor label printer Brother TD-4550DNWB thermal printer • Network (Ethernet), Wi-Fi, and Bluetooth • Prints black labels	**NOTE:** This printer is **no longer available** for purchase through Genetec™. We now support and sell the Brother QL-820NWBc (CD-KIOSK-PRINTER-NA-KIT).	

Item description	Part	Item
NOTE: Only the Brother RD Roll - 57mm Black (Brother Part No: RD001U1S) labels are supported.		
Annual subscription for one kiosk (Volume pricing available for 10 kiosks or more)	• CD-KIOSK-LIC-1Y	Kiosk subscription license

IMPORTANT: [1] For **EMEA**, **APAC**, and some **LATCAR** regions (when ordering either the CD-KIOSK-FLOORSTAND-KIT-V2 or the CD-KIOSK-TABLETOP-KIT-V2) you must include **CD-KIOSK-WORLD-ADAPTER-KIT**.

The CD-KIOSK-WORLD-ADAPTER-KIT part number includes a World Travel Adapter kit and power adapter plugs to fit different electrical outlets around the world. These include North America, Japan, China, United Kingdom, Continental Europe, Korea, Australia, Hong Kong, and Brazil. Without this kit, the plug is not compatible with the electrical outlets in your region.

For more information or to order kiosk parts, see Genetec Parts Manager.

Related Topics

ClearID Self-Service Kiosk Datasheet (2 pages)

Supported devices on page 77

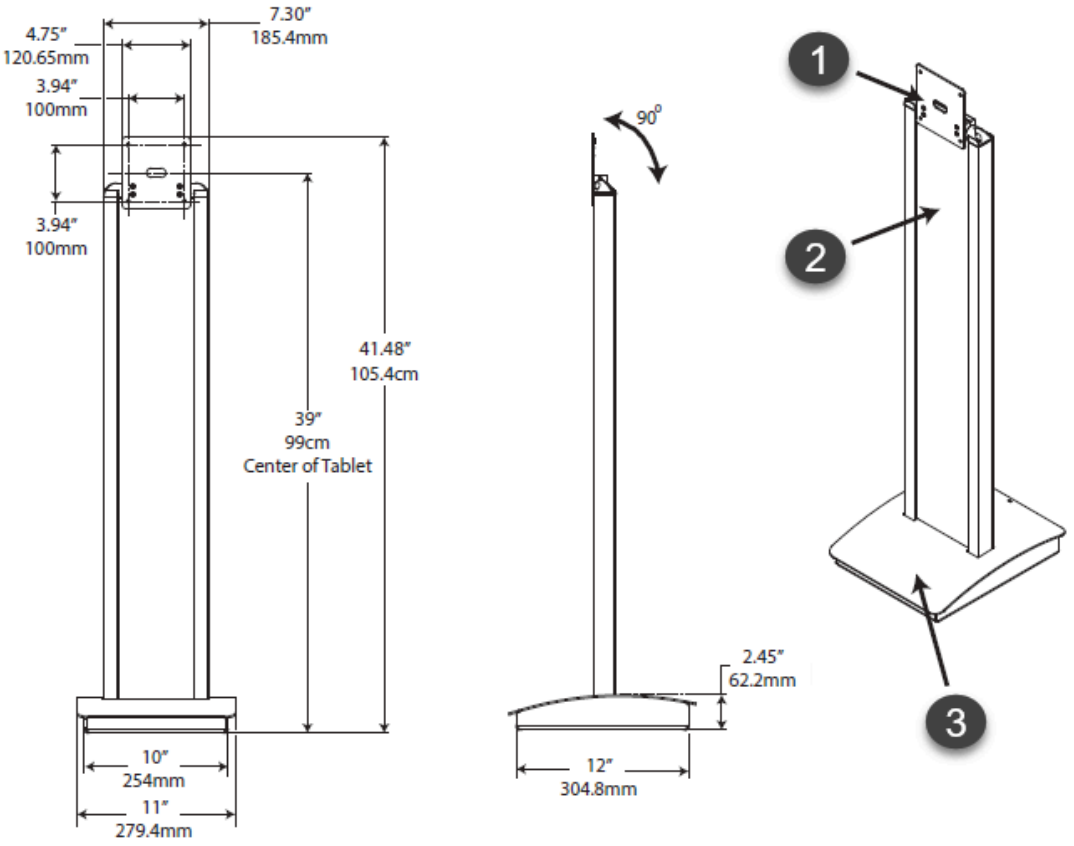
Kiosk floor stand

Use the following information to help you understand the Genetec ClearID™ Self-Service Kiosk floor stand dimensions, mounting, and features.

NOTE: Depending on your check-in requirements, the ClearID Self-Service Kiosk iPad housing can be configured on this floor stand for use in either *Portrait* or *Landscape* mode.

Floor stand dimensions

The following diagram illustrates the floor stand dimensions including the height and footprint of the stand.



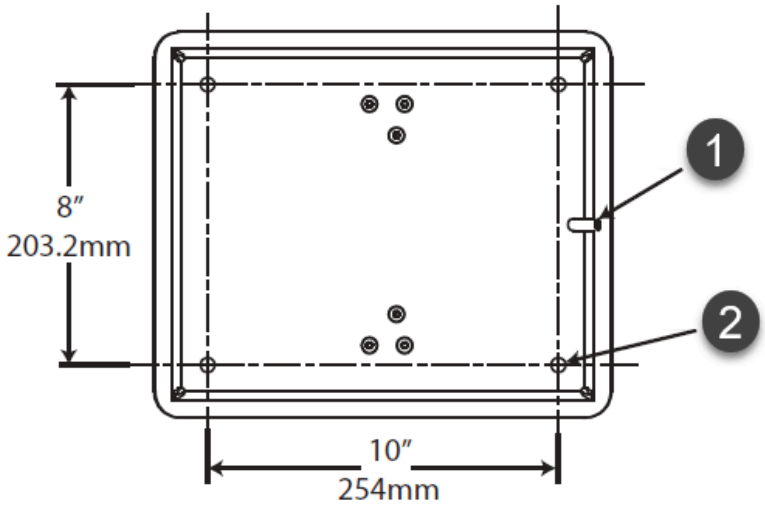
[1] Mount supports any tablet enclosure with a standard VESA mount (100mm x 100mm) or a 90° degree rotation adapter.

[2] Removable signage panel (included).

[3] Removable cover provides access to the storage area for the power supply.

Floor mount

The following diagram illustrates the floor mount dimensions and underside view of the kiosk floor stand.



[1] Opening for power supply cable.

[2] 4x floor mounting holes for 0.25inch or 6mm screw hardware (not included) used to secure the floor stand to the floor surface.

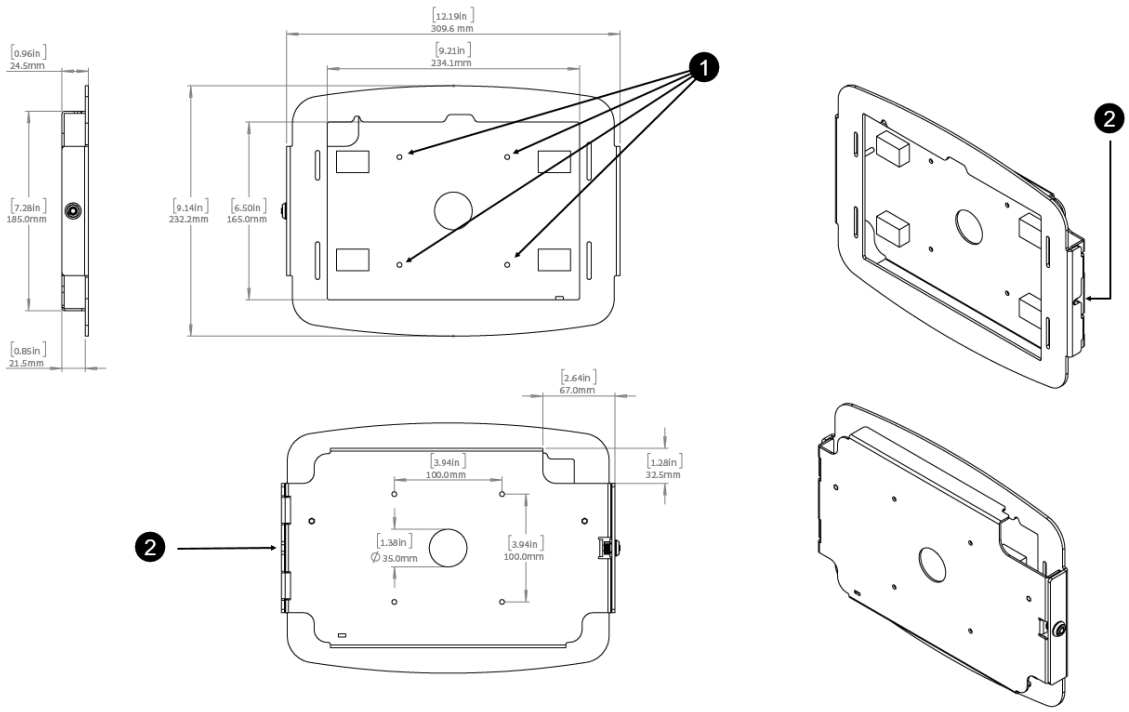
Floor stand features

The floor stand includes the following features:

- Free standing or floor mount option.
- The mount supports any tablet enclosure with a standard VESA mount (100mm x 100mm).
- Tablet power supply can be stored in the base.
- Tablet power cable can be concealed in the legs.
- The enclosure mounting surface can be rotated 90° degrees. This rotation function means that the iPad housing can be orientated on this floor stand for use in either *Portrait* or *Landscape* mode.

iPad enclosure

The following diagram illustrates the floor stand iPad enclosure dimensions.



[1] 4x holes for mounting iPad enclosure to floor stand.

[2] Opening for power supply cable.

Related Topics

Self-Service Kiosk options on page 615
About ClearID Self-Service Kiosk on page 560
ClearID Self-Service Kiosk Datasheet (2 pages)

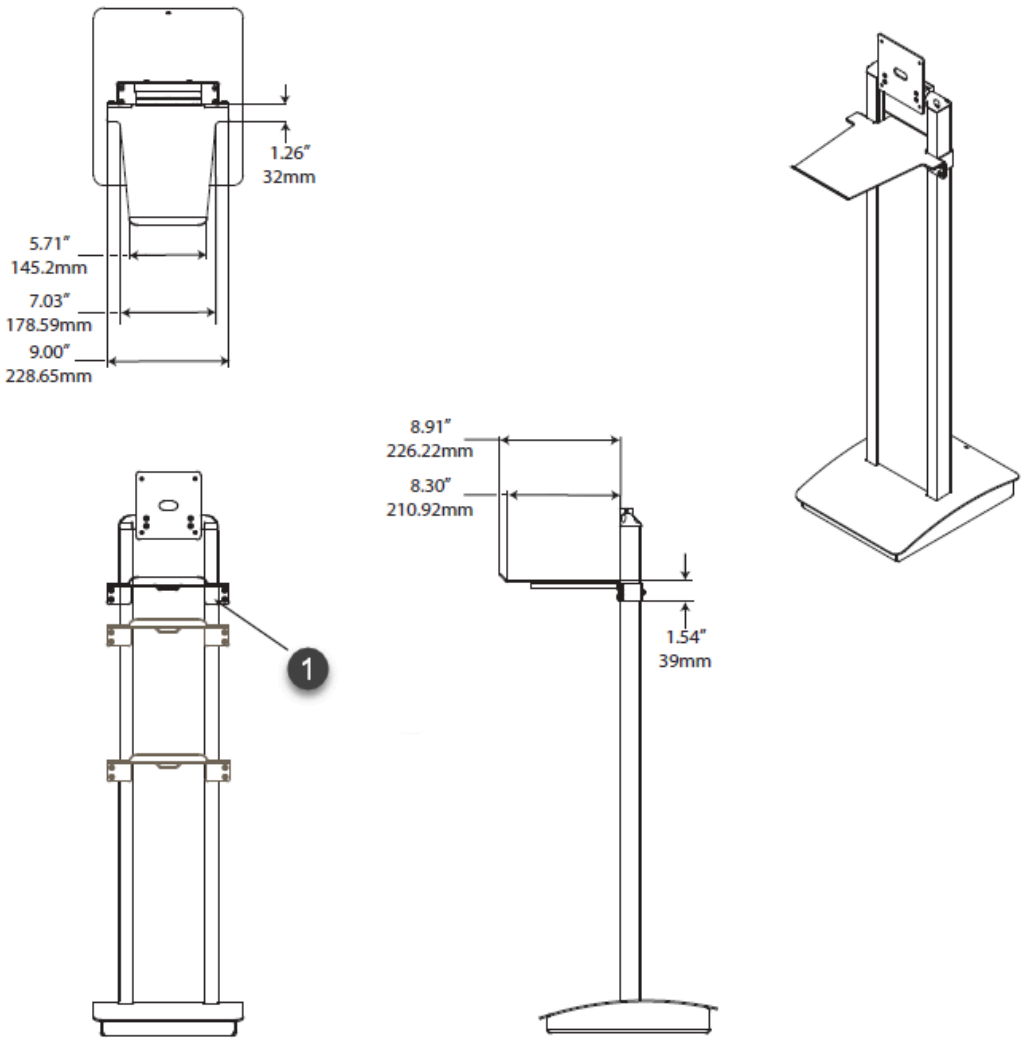
Kiosk floor stand printer shelf

Use the following information to help you understand the dimensions and features of the printer shelf for the Genetec ClearID™ Self-Service Kiosk floor stand.

NOTE: Depending on the size and model of printer that you choose. you might need to trim or modify the center panel (graphic panel) of the floor stand to allow for cable access.

Printer shelf dimensions

The following diagram illustrates the printer shelf dimensions.



[1] Height adjustable printer shelf.

Printer shelf features

The printer shelf includes the following features:

- Mounts to floor stand
- Height adjustable
- Fits various printers

Related Topics

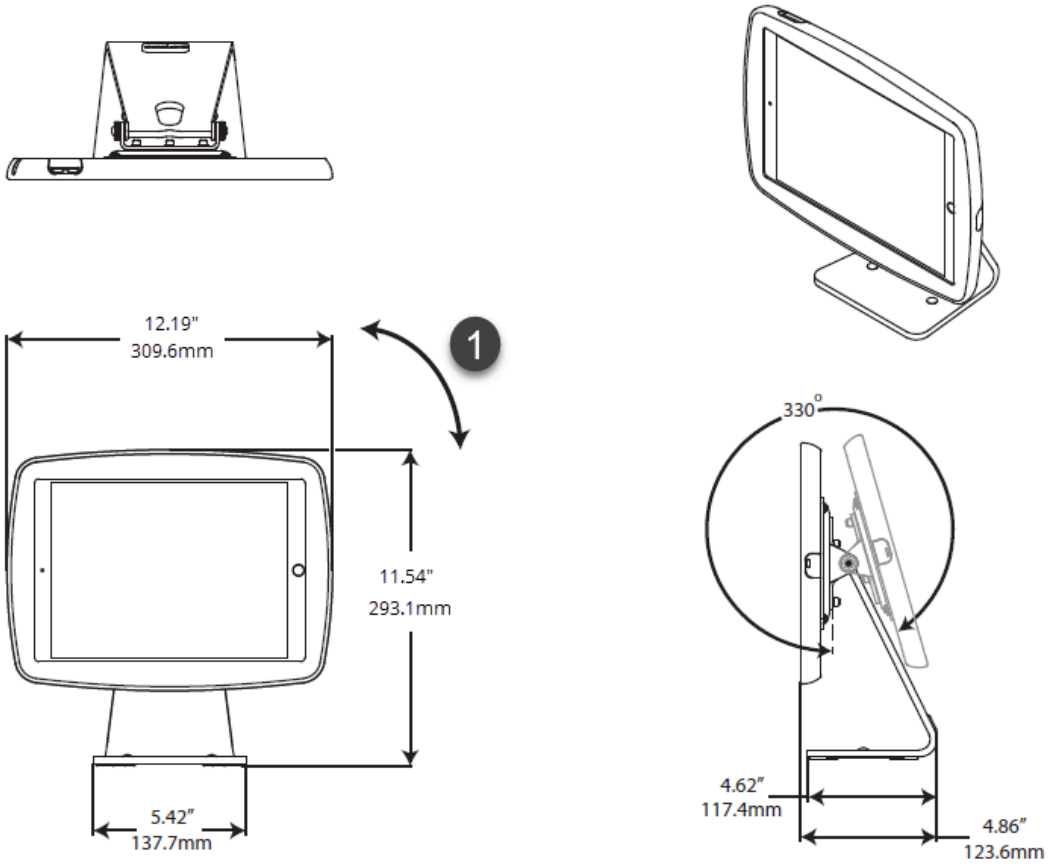
Self-Service Kiosk options on page 615
About ClearID Self-Service Kiosk on page 560
ClearID Self-Service Kiosk Datasheet (2 pages)

Kiosk tabletop stand

Use the following information to help you understand the Genetec ClearID™ Self-Service Kiosk tabletop stand dimensions, mounting, and features.

Tabletop stand dimensions

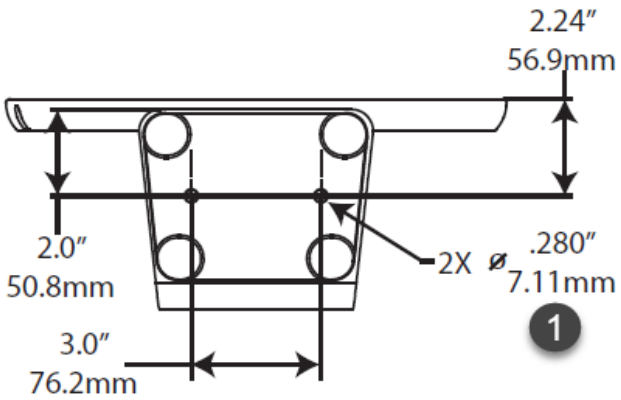
The following diagram illustrates the tabletop stand dimensions including the height and footprint of the stand.



[1] 90° rotation (portrait or landscape orientation).

Tabletop stand mounting

The following diagram illustrates the tabletop mount dimensions.



[1] 2x Tabletop mounting holes for 0.25inch or 6mm screw hardware (not included).

Tabletop stand features

The tabletop stand includes the following features:

- 90° degree rotation (portrait or landscape orientation).
- Flip tablet function.
- Counter mounting option.

Related Topics

Self-Service Kiosk options on page 615
About ClearID Self-Service Kiosk on page 560
ClearID Self-Service Kiosk Datasheet (2 pages)

Identity document types

Use the following information to help you understand all the different identity document types that are supported in Genetec ClearID™ Self-Service Kiosk.

An extensive list of ID types can be used when using the ClearID Self-Service Kiosk during check-in.

NOTE: All identity document processing is performed locally on the ClearID Self-Service Kiosk iPad. This local processing during check-in ensures that ID data or pictures are never sent to the cloud for maximum security and compliance.

Supported identity documents (Asia)

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Afghanistan	ID Card	کارت الکترونیکی	Front, back	Latin
Afghanistan	Paper Passport[BETA]	پاسپورټ	Bio-data page	Latin
Armenia	ID Card	նույնականացման քարտ	Front, back	Latin
Azerbaijan	ID Card	Şəxsiyyət vəsiqəsi	Front, back	Latin
Azerbaijan	Polycarbonate Passport[BETA]	Pasport	Bio-data page	Latin
Bangladesh	Driving License[BETA]	মটের ড্রাইভিং লাইসন্স	Front, back	Latin
Bangladesh	ID Card	জাতীয় পরচিয় পত্র	Front, back	Latin
Bangladesh	Paper Passport	পাসপোর্ট	Bio-data page	Latin
Brunei	ID Card	Kad Pengenalan (Kuning)	Front, back	Latin
Brunei	Military ID[BETA]	Kad Pengenalan Tentera (ABDB)	Front, back	Latin
Brunei	Residence Permit[BETA]	Kad Pengenalan (Ungu)	Front, back	Latin
Brunei	Temporary Residence Permit[BETA]	Kad Pengenalan (Hijau)	Front, back	Latin
Cambodia	Driving License[BETA]	##########	Front	Latin
Cambodia	ID Card	##########	Front	Latin
Cambodia	Polycarbonate Passport	##########	Bio-data page	Latin
China	ID Card	中华人民共和国居民身份证	Front, back	Latin
China	Paper Passport	中华人民共和国护照	Bio-data page	Latin
Hong Kong	ID Card	香港身份證	Front	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Hong Kong	Polycarbonate Passport[BETA]	護照	Bio-data page	Latin
India	ID Card[BETA]	Aadhaar card, आधार क्रार्ड	Front, back	Latin
India	PAN Card	स्थायी खाता स्ंखया क्रार्ड	Front	Latin
India	Paper Passport		Bio-data page	Latin
India	Voter ID	भारतीय मतदाता पहचान प्तर	Front, vertical	Latin
India, Gujarat	Driving License[BETA]	ड्राइवंगि लाइेंसस	Front	Latin
India, Karnataka	Driving License	ड्राइवंगि लाइेंसस	Front	Latin
India, Kerala	Driving License[BETA]	ड्राइवंगि लाइेंसस	Front, back	Latin
India, Madhya Pradesh	Driving License[BETA]	ड्राइवंगि लाइेंसस	Front	Latin
India, Maharashtra	Driving License	ड्राइवंगि लाइेंसस	Front	Latin
India, Punjab	Driving License[BETA]	ड्राइवंगि लाइेंसस	Front	Latin
India, Tamil Nadu	Driving License[BETA]	ड्राइवंगि लाइेंसस	Front, back	Latin
Indonesia	Driving License	Surat Izin Mengemudi (SIM)	Front	Latin
Indonesia	ID Card	Kartu Tanda Penduduk (KTP)	Front	Latin
Indonesia	Paper Passport	Paspor	Bio-data page	Latin
Japan	Driving License[BETA]	運転免許	Front	Latin
Japan	My Number Card	マイナンバーカード	Front	Latin
Japan	Paper Passport	旅券	Bio-data page	Latin
Japan	Residence Permit[BETA]	在留カード	Front	Latin
Kazakhstan	ID Card	Жеке қуәлік, Удостоверение личности	Front, back	Latin
Kyrgyzstan	ID Card	идентификациялык карта,идентификационная карта	Front, back	Latin
Malaysia	Driving License	Lesen Memandu	Front	Latin
Malaysia	MyKAS		Front, back	Latin
Malaysia	MyKad		Front, back	Latin
Malaysia	MyKid		Front, back	Latin
Malaysia	MyPR		Front, back	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Malaysia	MyPolis[BETA]		Front, back	Latin
Malaysia	MyTentera		Front, back	Latin
Malaysia	Refugee ID	UNHCR Card	Front	Latin
Malaysia	Polycarbonate Passport	Pasport	Bio-data page	Latin
Malaysia	i-Kad		Front	Latin
Maldives	ID Card	############## ###### #### ##########	Front, back	Latin
Myanmar	Driving License	##################	Front, back	Latin
Nepal	Paper Passport	राहदानी	Bio-data page	Latin
Pakistan	Consular ID	National Identity Card for Overseas Pakistanis (NICOP)	Front, back	Latin
Pakistan	ID Card	Computerized National Identity Card (CNIC), Smart National Identity Card (SNIC)	Front, back	Latin
Pakistan	Paper Passport		Bio-data page	Latin
Pakistan, Punjab	Driving License		Front	Latin
Philippines	Driving License		Front	Latin
Philippines	ID Card	PhilSys ID, PhilID	Front, back	Latin
Philippines	Multipurpose ID	Unified Multi-Purpose ID	Front	Latin
Philippines	Paper Passport		Bio-data page	Latin
Philippines	Professional ID	PRC License	Front	Latin
Philippines	Social Security Card	SSS ID	Front	Latin
Philippines	Tax ID[BETA]	TIN ID card	Front	Latin
Philippines	Voter ID[BETA]		Front	Latin
Singapore	Driving License		Front, back	Latin
Singapore	Employment Pass		Front	Latin
Singapore	Fin Card		Front	Latin
Singapore	ID Card	NRIC (Pink)	Front, back	Latin
Singapore	Resident ID	NRIC (Blue)	Front, back	Latin
Singapore	Polycarbonate Passport		Bio-data page	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Singapore	S Pass		Front, back	Latin
Singapore	Work Permit		Front, back	Latin
South Korea	Driving License	자동차운전면허증	Front	Latin
South Korea	ID Card[BETA]	주민등록증	Front	Latin
South Korea	Paper Passport[BETA]	여권	Bio-data page	Latin
Sri Lanka	Driving License	####### #######	Front	Latin
Sri Lanka	ID Card	##### ##########, தேசிய அடையாள அட்டை	Front, back, vertical	Latin
Sri Lanka	Paper Passport	#### #######, கடவுச்சீட்டு	Bio-data page	Latin
Taiwan	ID Card[BETA]	中華民國國民身分證	Front	Latin
Taiwan	Temporary Residence Permit[BETA]	中華民國居留證 (ARC)	Front	Latin
Latin	Latin	Latin	Latin	Latin
Thailand	Alien ID	บัตรประจำตัวคนซึ่งไม่มีสัญชาติไทย (บัตรสีชมพู)	Front	Latin
Thailand	Driving License[BETA]	ใบอนุญาตขับรถ	Front, back	Latin
Thailand	ID Card	บัตรประจำตัวประชาชน	Front, back	Latin
Thailand	Polycarbonate Passport	หนังสือเดินทาง	Bio-data page	Latin
Vietnam	Driving License[BETA]	Giấy phép lái xe	Front	Latin
Vietnam	ID Card[BETA]	Căn cước công dân, Giấy chứng minh nhân dân	Front, back	Latin

Supported identity documents (Europe)

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Albania	Driving License	Leje drejtimi	Front	Latin
Albania	Driver Card	Karta e drejtuesit të mjetit	Front	Latin
Albania	ID Card	Letërnjoftim	Front, back	Latin
Albania	Professional DL	Certifikatë aftësimi profesionale	Front	Latin
Albania	Polycarbonate Passport	Pasaportë	Bio-data page	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Austria	Driving License	Führerschein	Front	Latin
Austria	ID Card	Personalausweis	Front, back	Latin
Austria	Paper Passport	Reisepass	Bio-data page	Latin
Austria	Residence Permit[BETA]	Aufenthaltstitel	Front, back	Latin
Belarus	Driving License	ВАДЗІЦЕЛЬСКАЕ ПАСВЕДЧАННЕ, ВОДИТЕЛЬСКОЕ УДОСТОВЕРЕНИЕ	Front	Latin
Belarus	Paper Passport	Пашпарт, Паспорт	Bio-data page	Latin
Belgium	Driving License	Rijbewijs, Permis de conduire, Führerschein	Front	Latin
Belgium	ID Card	Identiteitskaart, Carte d'identité, Personalausweis	Front, back	Latin
Belgium	Minors ID	Kids-ID	Front, back	Latin
Belgium	Paper Passport	Paspoort, Passeport, Reisepass	Bio-data page	Latin
Belgium	Residence Permit	Verblijfstitel, Titre de Sejour	Front, back	Latin
Belgium	Resident ID	Document de Seojur, Verblijfsdocument, Aufenthaltsdokument, E Kaart, Carte E, E Karte; E+ Kaart, Carte E+, E+ Karte; F Kaart, Carte F, F Karte; F+ Kaart, Carte F+, F+ Karte	Front, back	Latin
Belgium	Polycarbonate Passport[BETA]	Paspoort, Passeport, Reisepass	Bio-data page	Latin
Bosnia and Herzegovina	Driving License	Vozačka dozvola	Front	Latin
Bosnia and Herzegovina	ID Card	Lična karta, Osobna iskaznica	Front, back	Cyrillic, Latin
Bosnia and Herzegovina	Polycarbonate Passport	Pasoš, Пасош, Putovnica	Bio-data page	Latin
Bulgaria	Driving License	Свидетелство за управление на МПС	Front	Cyrillic, Latin
Bulgaria	ID Card	Лична карта	Front, back	Cyrillic, Latin
Bulgaria	Paper Passport	Паспорт	Bio-data page	Latin
Croatia	Driving License	Vozačka dozvola	Front	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Croatia	ID Card	Osobna iskaznica	Front, back	Latin
Croatia	Residence Permit[BETA]	Boravišna iskaznica, Dozvola boravka	Front, back	Latin
Croatia	Polycarbonate Passport	Putovnica	Bio-data page	Latin
Cyprus	Driving License	Sürüş ruhsati, Αάδεια οδήγησης	Front	Latin
Cyprus	ID Card	Kimlik kartı, Δελτίο Ταυτότητας	Front, back	Latin
Cyprus	Paper Passport	Pasaport, Διαβατήριο	Bio-data page	Latin
Cyprus	Residence Permit	ΑΔΕΙΑ ΔΙΑΜΟΝΗΣ	Front, back	Latin
Czechia	Driving License	Řidičský průkaz	Front	Latin
Czechia	ID Card	Občanský průkaz	Front, back	Latin
Czechia	Residence Permit	Povolení k pobytu	Front, back	Latin
Czechia	Polycarbonate Passport	Cestovní pas	Bio-data page	Latin
Denmark	Driving License	Kørekort	Front	Latin
Denmark	Residence Permit beta	Opholdstilladelse, Opholdskort	Front, back	Latin
Denmark	Polycarbonate Passport	Pas	Bio-data page	Latin
Estonia	Driving License	Juhiluba	Front	Latin
Estonia	ID Card	Isikutunnistus	Front, back	Latin
Estonia	Paper Passport	Pass	Bio-data page	Latin
Estonia	Residence Permit[BETA]	Elamisluba	Front, back	Latin
Finland	Alien ID	Ulkomaalaisen henkilökortti, Identitetskort för utlänning	Front, back	Latin
Finland	Driving License	Ajokortti, Körkort	Front	Latin
Finland	ID Card	Henkilökortti, Identitetskort	Front, back	Latin
Finland	Residence Permit	Oleskelulupa, Uppehållstillstånd	Front, back	Latin
Finland	Polycarbonate Passport	Passi, Pass	Bio-data page	Latin
France	Driving License	Permis de conduire	Front	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
France	ID Card	Carte d'identité	Front, back	Latin
France	Paper Passport[BETA]	Passeport	Bio-data page	Latin
France	Residence Permit[BETA]	Titre de séjour	Front, back	Latin
Georgia	Driving License	მართვის მოწმობა	Front	Latin
Georgia	ID Card	მოქალაქის პირადობის მოწმობა	Front, back	Latin
Georgia	Paper Passport[BETA]	პასპორტი	Bio-data page	Latin
Germany	Driving License	Führerschein	Front	Latin
Germany	ID Card	Personalausweis	Front, back	Latin
Germany	Minors Passport	Kinderreisepass	Bio-data page	Latin
Germany	Paper Passport	Reisepass	Bio-data page	Latin
Germany	Residence Permit	Aufenthaltstitel	Front, back	Latin
Germany	Polycarbonate Passport	Reisepass	Bio-data page	Latin
Greece	Driving License	Αάδεια οδήγησης	Front	Latin
Greece	ID Card	ΔΕΛΤΙΟ ΤΑΥΤΟΤΗΤΑΣ	Front, back	Latin
Greece	Paper Passport	Διαβατήριο	Bio-data page	Latin
Greece	Residence Permit	ΑΔΕΙΑ ΔΙΑΜΟΝΗΣ	Front, back	Latin
Hungary	Address Card[BETA]	Lakcímkártya, Lakcímigazolvány	Front, back	Latin
Hungary	Driving License	Vezetői engedély	Front	Latin
Hungary	ID Card	Személyazonosító igazolvány	Front, back	Latin
Hungary	Paper Passport	Útlevél	Bio-data page	Latin
Hungary	Residence Permit[BETA]	Tartózkodási engedély	Front, back	Latin
Iceland	Driving License[BETA]	Ökuskírteini	Front	Latin
Iceland	Paper Passport[BETA]	Vegabréf	Bio-data page	Latin
Ireland	Driving License	Ceadúnas tiomána	Front	Latin
Ireland	Passport Card	Cárta Pas	Front, back	Latin
Ireland	Public Services Card	Cárta Seirbhísí Poiblí	Front, back	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Ireland	Residence Permit[BETA]		Front, back	Latin
Ireland	Polycarbonate Passport	Pas	Bio-data page	Latin
Italy	Driving License	Patente di guida	Front	Latin
Italy	ID Card	Carta d'identità	Front, back	Latin
Italy	Paper Passport[BETA]	Passaporto	Bio-data page	Latin
Italy	Residence Permit	Permesso di soggiorno	Front, back	Latin
Kosovo	Driving License	Patentë shoferi, возачка дозвола	Front	Latin
Kosovo	ID Card	Letërnjoftim, Лична карта	Front, back	Latin
Kosovo	Paper Passport	Pasaportë, Пасош	Bio-data page	Latin
Latvia	Alien ID	Nepilsoņa personas apliecība	Front, back	Latin
Latvia	Driving License	Vadītāja apliecība	Front	Latin
Latvia	ID Card	Personas apliecība	Front, back	Latin
Latvia	Residence Permit[BETA]	Uzturēšanās atļauja	Front, back	Latin
Latvia	Polycarbonate Alien Passport	Nepilsoņa pase	Bio-data page	Latin
Latvia	Polycarbonate Passport	Pase	Bio-data page	Latin
Liechtenstein	ID Card	Identitätskarte	Front, back	Latin
Lithuania	Driving License	Vairuotojo pažymėjimai	Front	Latin
Lithuania	ID Card	Asmens tapatybės kortelė	Front, back	Latin
Lithuania	Residence Permit[BETA]	Leidimas gyventi	Front, back	Latin
Lithuania	Polycarbonate Passport	Pasas	Bio-data page	Latin
Luxembourg	Driving License	Permis de conduire	Front	Latin
Luxembourg	ID Card	Carte d'Identité, Personalausweis	Front, back	Latin
Luxembourg	Residence Permit	Titre de sejour	Front, back	Latin
Luxembourg	Polycarbonate Passport	Pass, Passeport	Bio-data page	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Malta	Driving License	Liċenzja tas-Sewqan	Front	Latin
Malta	ID Card	Karta tal-Identità	Front, back	Latin
Malta	Residence Permit	Permess ta' residenza, Residence documentation	Front, back	Latin
Moldova	ID Card[BETA]	Buletin de identitate	Front, back	Latin
Moldova	Paper Passport[BETA]	Paşaport	Bio-data page	Latin
Montenegro	Driving License	Vozačka dozvola, Возачка дозвола	Front	Latin
Montenegro	ID Card	Lična karta, Лична карта	Front, back	Latin
Montenegro	Polycarbonate Passport	Pasoš, Пасош	Bio-data page	Latin
Netherlands	Driving License	Rijebewijs	Front, back	Latin
Netherlands	ID Card	Identiteitskaart (ID-kaart)	Front, back	Latin
Netherlands	Residence Permit	Verblijfstitel, Verblijfskaart	Front, back	Latin
Netherlands	Polycarbonate Passport	Paspoort	Bio-data page	Latin
North Macedonia	Driving License	возачка дозвола, Patentë shoferi	Front	Cyrillic, Latin
North Macedonia	ID Card	лична карта, Letërnjoftim	Front, back	Cyrillic, Latin
North Macedonia	Polycarbonate Passport	Пасош, Pasaportë	Bio-data page	Latin
Norway	Driving License	Førerkort, Førarkort	Front	Latin
Norway	ID Card		Front, back	Latin
Norway	Residence Permit	Oppholdstillatelse, Opphaldsløyve	Front, back	Latin
Norway	Polycarbonate Passport	Pass	Bio-data page	Latin
Poland	Driving License	Prawo jazdy	Front	Latin
Poland	ID Card	Dowód osobisty	Front, back	Latin
Poland	Paper Passport	Paszport	Bio-data page	Latin
Poland	Residence Permit[BETA]	Karta pobytu	Front, back	Latin
Poland	Polycarbonate Passport	Paszport	Bio-data page	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Portugal	Driving License	Carta de Condução	Front	Latin
Portugal	ID Card	Cartão de Cidadão (CC)	Front, back	Latin
Portugal	Paper Passport	Passaporte	Bio-data page	Latin
Portugal	Residence Permit[BETA]	Título de Residência, Cartão de Residência	Front, back	Latin
Romania	Driving License	Permis de conducere	Front	Latin
Romania	ID Card	Carte de identitate	Front	Latin
Romania	Polycarbonate Passport	Pasaport, Pașaport	Bio-data page	Latin
Russia	Driving License	Водительское удостоверение	Front	Latin
Russia	Polycarbonate Passport	(Заграничный) Паспорт	Bio-data page	Latin
Serbia	Driving License	Возачка дозвола, Vozačka dozvola	Front	Latin
Serbia	ID Card	Лична карта, Lična karta	Front, back	Cyrillic, Latin
Serbia	Polycarbonate Passport	Пасош, Pasoš	Bio-data page	Latin
Slovakia	Driving License	Vodičský preukaz	Front	Latin
Slovakia	ID Card	Občiansky preukaz	Front, back	Latin
Slovakia	Residence Permit	Povolenie na pobyt, Pobytový preukaz občana EÚ, Pobytový preukaz rodinného príslušníka občana EÚ	Front, back	Latin
Slovakia	Polycarbonate Passport	Cestovný pas	Bio-data page	Latin
Slovenia	Driving License	Vozniško dovoljenje	Front	Latin
Slovenia	ID Card	Osebna izkaznica	Front, back	Latin
Slovenia	Residence Permit	Dovoljenje za prebivanje	Front, back	Latin
Slovenia	Polycarbonate Passport	Potni list	Bio-data page	Latin
Spain	Alien ID	Tarjeta de Identidad de Extranjero (TIE)	Front, back	Latin
Spain	Driving License	Permiso de Conducción	Front	Latin
Spain	ID Card	Documento Nacional de Identidad (DNI)	Front, back	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Spain	Paper Passport	Pasaporte	Bio-data page	Latin
Spain	Residence Permit	Permiso de residencia	Front, back	Latin
Sweden	Driving License	Körkort	Front	Latin
Sweden	ID Card	Nationellt identitetskort	Front, back	Latin
Sweden	Residence Permit	Uppehållstillstånd, Uppehållskort	Front, back	Latin
Sweden	Polycarbonate Passport	Pass	Bio-data page	Latin
Sweden	Social Security Card	Identitetskort, Skatteverkets id-kort	Front	Latin
Switzerland	Driving License	Führerausweis, Permis de conduire, Licenza di condurre, Permiss da manischar	Front	Latin
Switzerland	ID Card	Identitätskarte, Carte d'identité, Carta d'identità, Carta d'identitad	Front, back	Latin
Switzerland	Paper Passport	Pass, Passeport, Passaporto,Passaport	Bio-data page	Latin
Switzerland	Residence Permit	Aufenthaltstitel, Titre de séjour, Permesso di soggiorno, Permissiun da dimora	Front, back	Latin
UK	Driving License	Trwydded yrru	Front	Latin
UK	Paper Passport		Bio-data page	Latin
UK	Proof Of Age Card	CitizenCard	Front	Latin
UK	Residence Permit		Front, back	Latin
UK	Polycarbonate Passport		Bio-data page	Latin
Ukraine	Driving License	Посвідчення водія,Водительское удостоверение	Front	Cyrillic, Latin
Ukraine	ID Card	Паспорт громадянина України	Front, back	Cyrillic, Latin
Ukraine	Residence Permit	Посвідка на постійне проживання (ППП)	Front, back	Cyrillic, Latin
Ukraine	Polycarbonate Passport	Паспорт	Bio-data page	Latin
Ukraine	Temporary Residence Permit	Посвідка на тимчасове проживання	Front, back	Cyrillic, Latin

Supported identity documents (Latin America and the Caribbean)

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Antigua and Barbuda	Driving License[BETA]		Front	Latin
Argentina	Alien ID	DNI para extranjeros	Front, back	Latin
Argentina	Driving License[BETA]	Licencia de Conducir	Front	Latin
Argentina	ID Card	Documento Nacional de Identidad (DNI)	Front, back	Latin
Argentina	Paper Passport	Pasaporte	Bio-data page	Latin
Bahamas	Driving License		Front	Latin
Bahamas	ID Card[BETA]	NIB Smart Card	Front	Latin
Barbados	ID Card[BETA]		Front, back	Latin
Bolivia	Driving License	Licencia para conducir	Front	Latin
Bolivia	ID Card	Cédula de identidad	Front, back	Latin
Bolivia	Minors ID	Cédula de identidad para menores	Front, back	Latin
Brazil	Consular Passport[BETA]	Passaporte	Bio-data page	Latin
Brazil	Driving License	Carteira Nacional de Habilitação (CNH)	Front, back	Latin
Brazil	ID Card[BETA]	Cédula de identidade	Front, back	Latin
Brazil	Paper Passport[BETA]	Passaporte	Bio-data page	Latin
Brazil, Rio De Janeiro	ID Card	Cédula de identidade	Front, back	Latin
Brazi, Rio Grande do Sul	ID Card[BETA]	Cédula de identidade	Front, back	Latin
Brazi, Sao Paulo	ID Card	Cédula de identidade	Front, back	Latin
Cayman Islands	Driving License[BETA]	Driver's license	Front	Latin
Chile	Alien ID	Cédula de identidad para extranjeros	Front, back	Latin
Chile	Driving License	Licencia de conducir	Front	Latin
Chile	ID Card	Cédula de Identidad	Front, back	Latin
Chile	Polycarbonate Passport	Pasaporte	Bio-data page	Latin
Columbia	Alien ID	Cédula de Extranjería (CE)	Front, back	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Columbia	Driving License	Licencia de Conducción	Front, back	Latin
Columbia	ID Card	Cédula Digital Colombiana, Cédula de Ciudadanía (CC)	Front, back	Latin
Columbia	Minors ID	Tarjeta de identidad Biométrica (Azul)	Front, back	Latin
Columbia	Polycarbonate Passport	Pasaporte	Bio-data page	Latin
Costa Rica	Driving License[BETA]	Licencia de conducir	Front	Latin
Costa Rica	ID Card	Cédula de identidad	Front, back	Latin
Cuba	ID Card[BETA]	Carné de Identidad	Front, back	Latin
Cuba	Paper Passport	Pasaporte	Bio-data page	Latin
Dominican Republic	Driving License[BETA]	Licencia de conducir	Front, back	Latin
Dominican Republic	ID Card	Cédula de Identidad y Electoral (CIE)	Front, back	Latin
Dominican Republic	Paper Passport	Pasaporte	Bio-data page	Latin
Ecuador	Driving License	Licencia de conducir	Front	Latin
Ecuador	ID Card	Cédula de Identidad, Cédula de Identidad Electrónica	Front, back	Latin
El Salvador	Driving License[BETA]	Licencia de conducir	Front, back	Latin
El Salvador	ID Card	Documento Único de Identidad (DUI)	Front, back	Latin
Guatemala	Consular ID	Tarjeta de Identificación Consular (TICG)	Front, back	Latin
Guatemala	Driving License	Licencia de conducir	Front, back	Latin
Guatemala	ID Card	Documento Personal de Identificación (DPI)	Front, back	Latin
Guatemala	Paper Passport	Pasaporte	Bio-data page	Latin
Haiti	Driving License	Permis de conduire	Front	Latin
Haiti	ID Card	Carte d'identification nationale (CIN), Kat Idantifikasyon Nasyonal	Front, back	Latin
Haiti	Paper Passport	Passeport, Paspò	Bio-data page	Latin
Honduras	Driving License[BETA]	Licencia de conducir	Front, back	Latin
Honduras	ID Card[BETA]	Tarjeta de identidad	Front, back	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Honduras	Paper Passport[BETA]	Pasaporte	Bio-data page	Latin
Jamaica	Driving License	Motor vehicle license, MV license	Front, back	Latin
Mexico	Consular ID[BETA]	Matrícula consular	Front, back	Latin
Mexico	Paper Passport[BETA]	Pasaporte	Bio-data page	Latin
Mexico	Professional DL[BETA]	Licencia Federal de Conductor	Front	Latin
Mexico	Professional ID[BETA]	Cédula Profesional	Front, back, vertical	Latin
Mexico	Residence Permit beta	Tarjeta de Residencia Temporal y Residencia Permanente	Front, back	Latin
Mexico	Polycarbonate Passport	Pasaporte	Bio-data page	Latin
Mexico	Voter ID	Credencial para votar	Front, back	Latin
Mexico, Aguascalientes	Driving License	Licencia de Conducir	Front, back, vertical	Latin
Mexico, Baja California	Driving License	Licencia de Conducir	Front, back, vertical	Latin
Mexico, Baja California Sur	Driving License[BETA]	Licencia de Conducir	Front, back	Latin
Mexico, Campeche	Driving License[BETA]	Licencia de Conducir	Front, back	Latin
Mexico, Chiapas	Driving License	Licencia de Conducir	Front, back	Latin
Mexico, Chihuahua	Driving License	Licencia de Conducir	Front, back	Latin
Mexico, Ciudad de Mexico	Driving License	Licencia de Conducir	Front, vertical	Latin
Mexico, Coahuila	Driving License	Licencia de Conducir	Front, back	Latin
Mexico, Colima	Driving License	Licencia de Conducir	Front, back	Latin
Mexico, Durango	Driving License	Licencia de Conducir	Front	Latin
Mexico, Guanajuato	Driving License	Licencia de Conducir	Front, back	Latin
Mexico, Guerrero Cocula	Driving License[BETA]	Licencia de Conducir	Front, back	
Mexico, Guerrero Juchitan	Driving License[BETA]	Licencia de Conducir	Front, back	Latin
Mexico, Hidalgo	Driving License	Licencia de Conducir	Front, back, vertical	Latin
Mexico, Jalisco	Driving License	Licencia de Conducir	Front	Latin
Mexico, Mexico	Driving License	Licencia de Conducir	Front, back	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Mexico, Michoacan	Driving License	Licencia de Conducir	Front, back	Latin
Mexico, Morelos	Driving License	Licencia de Conducir	Front	Latin
Mexico, Nayarit	Driving License[BETA]	Licencia de Conducir	Front, back	Latin
Mexico, Nuevo Leon	Driving License	Licencia de Conducir	Front, back	Latin
Mexico, Oaxaca	Driving License	Licencia de Conducir	Front, back	Latin
Mexico, Puebla	Driving License[BETA]	Licencia de Conducir	Front, back	Latin
Mexico, Quintana Roo Cozumel	Driving License[BETA]	Licencia de Conducir	Front, back	Latin
Mexico, Quintana Roo Solidaridad	Driving License	Licencia de Conducir	Front, back, vertical,	Latin
Mexico, San Luis Potosi	Driving License	Licencia de Conducir	Front	Latin
Mexico, Sinaloa	Driving License[BETA]	Licencia de Conducir	Front	Latin
Mexico, Sonora	Driving License[BETA]	Licencia de Conducir	Front, back	Latin
Mexico, Tabasco	Driving License[BETA]	Licencia de Conducir	Front, back	Latin
Mexico, Tamaulipas	Driving License	Licencia de Conducir	Front, back, vertical,	Latin
Mexico, Tlaxcala	Driving License	Licencia de Conducir	Front, back	Latin
Mexico, Veracruz	Driving License[BETA]	Licencia de Conducir	Front, back	Latin
Mexico, Yucatan	Driving License[BETA]	Licencia de Conducir	Front, back	Latin
Mexico, Zacatecas	Driving License	Licencia de Conducir	Front, back	Latin
Nicaragua	ID Card	Cédula de Identidad Ciudadana	Front, back	Latin
Panama	Driving License	Licencia de Conducir	Front	Latin
Panama	ID Card	Cédula de Identidad	Front	Latin
Panama	Residence Permit	Carné de Residente Permanente	Front	Latin
Panama	Temporary Residence Permit	Carné de Residencia Provisional	Front, back	Latin
Paraguay	Driving License	Licencia de Conducir	Front, back	Latin
Paraguay	ID Card	Cédula de Identidad Civil	Front, back	Latin
Peru	Driving License	Licencia de conducir	Front, back	Latin
Peru	ID Card	Documento Nacional de Identidad (DNI)	Front, back	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Peru	Minors ID[BETA]	Documento Nacional de Identidad (DNI) para menores	Front, back	Latin
Peru	Paper Passport	Pasaporte	Bio-data page	Latin
Puerto Rico	Driving License	Licencia de Conducir	Front	Latin
Puerto Rico	Voter ID[BETA]	Tarjeta de Identificación Electoral (TIE), Electoral Identification Card	Front	Latin
Saint Lucia	ID Card[BETA]		Front, back	Latin
Trinidad and Tobago	Driving License		Front	Latin
Trinidad and Tobago	ID Card		Front, back	Latin
Uruguay	ID Card	Cédula de Identidad	Front, back	Latin
Venezuela	Driving License	Licencia para conducir	Front	Latin
Venezuela	ID Card	Cédula de Identidad	Front	Latin
Venezuela	Polycarbonate Passport	Pasaporte	Bio-data page	Latin

Supported identity documents (Middle East and Africa)

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Algeria	Driving License	رخصة القيادة	Front, back	Latin
Algeria	ID Card	Carte nationale d'identité, بطاقة الهوية الوطني	Front, back	Latin
Algeria	Paper Passport	رفس الزواج, Passeport	Bio-data page	Latin
Bahrain	ID Card	بطاقة الهوية, CPR Card	Front, back	Latin
Botswana	ID Card	Omang	Front, back	Latin
Burkina Faso	ID Card	Carte Nationale d'Identité Burkinabè (CNIB)	Front, back	Latin
Cameroon	ID Card	Carte Nationale d'Identité (CNI)	Front, back	Latin
Democratic Republic of the Congo	Driving License[BETA]	Permis de conduire (CONADEP)	Front, back	Latin
Egypt	Driving License[BETA]	رخصة القيادة	Front, back	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Egypt	ID Card	بطاقة تحقيق الشخصية	Front, back	Arabic, Latin
Egypt	Paper Passport[BETA]	جواز سفر	Bio-data page	Latin
Eswatini	Paper Passport		Bio-data page	Latin
Ghana	Driving License		Front	Latin
Ghana	ID Card	Ghana Card	Front, back	Latin
Ghana	Paper Passport		Bio-data page	Latin
Iran	Paper Passport[BETA]	گذرنامه	Bio-data page	Latin
Iraq	ID Card	البطاقة الوطنية, كارتى نيشتمانى	Front, back	Latin
Iraq	Paper Passport[BETA]	جواز سفر, پاسپورت	Bio-data page	Latin
Israel	Driving License	רשיון נהיגה	Front	Latin
Israel	ID Card	Tehudat Zehut, بطاقة هوية, תעודת זהות	Front, back	Latin
Israel	Paper Passport[BETA]	דרכון	Bio-data page	Latin
Ivory Coast	Driving License	Permis de conduire	Front	Latin
Ivory Coast	ID Card	Carte Nationale d'Identité (CNI)	Front, back	Latin
Jordan	Driving License[BETA]	رخصة القيادة	Front	Latin
Jordan	ID Card	بطاقة شخصية	Front, back	Arabic, Latin
Jordan	Paper Passport[BETA]	جواز سفر	Bio-data page	Latin
Kenya	ID Card	Kitambulisho	Front, back	Latin
Kenya	Polycarbonate Passport	Passport, Pasi	Bio-data page	Latin
Kuwait	Driving License	رخصة القيادة	Front, back	Latin
Kuwait	ID Card	بطاقة المدنية	Front, back	Latin
Kuwait	Resident ID	بطاقة المدنية	Front, back	Latin
Lebanon	ID Card	بطاقة الهوية	Front, back	Latin
Libya	Polycarbonate Passport	جواز سفر	Bio-data page	Latin
Mauritius	ID Card		Front, back	Latin
Morocco	Driving License	Permis de conduire, رخصة القيادة	Front, back	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Morocco	ID Card	Carte nationale d'identité, بطاقة التعريف الوطنية	Front, back	Latin
Morocco	Paper Passport[BETA]	Passeport, جواز سفر	Bio-data page	Latin
Mozambique	Driving License[BETA]	Carta de Condução	Front	Latin
Mozambique	ID Card	Bilhete de Identidade (BI)	Front, back	Latin
Nigeria	Driving License		Front, back	Latin
Nigeria	ID Card	e-ID card	Front, back	Latin
Nigeria	Paper Passport		Bio-data page	Latin
Nigeria	Polycarbonate Passport[BETA]		Bio-data page	Latin
Nigeria	Voter ID	Permanent Voter Card (PVC)	Front, back	Latin
Oman	Driving License[BETA]	رخصة قيادة مركبة	Front, back	Latin
Oman	ID Card	بطاقة الهوية	Front, back	Latin
Oman	Resident ID	بطاقة مقيم	Front, back	Latin
Qatar	Driving License	رخصة القيادة	Front	Latin
Qatar	ID Card[BETA]	بطاقة إثبات شخصية	Front	Latin
Qatar	Paper Passport	جواز سفر	Bio-data page	Latin
Qatar	Residence Permit	تصريح الإقامة	Front, back	Latin
Rwanda	ID Card	Indangamuntu	Front	Latin
Saudi Arabia	Driving License	رخصة قيادة	Front	Latin
Saudi Arabia	ID Card	بطاقة الأحوال المدنية	Front, back	Latin
Saudi Arabia	Paper Passport	جواز سفر	Bio-data page	Latin
Saudi Arabia	Resident ID	Iqama, هوية المقيم	Front	Latin
Senegal	ID Card	Carte d'identité biométrique CEDEAO, Carte nationale d'identité	Front, back	Latin
South Africa	Driving License	Bestuurslisensie	Front	Latin
South Africa	ID Card	Smart ID card	Front, back	Latin
South Africa	ID Card[BETA]	Green barcoded ID book	Front, vertical	Latin
South Africa	Polycarbonate Passport	Passeport	Bio-data page	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Sudan	Polycarbonate Passport	جواز سفر	Bio-data page	Latin
Syria	Paper Passport	جواز سفر	Bio-data page	Latin
Tanzania	Driving License	Leseni ya udereva	Front	Latin
Tanzania	ID Card[BETA]	Kitambulisho cha Taifa, NIDA	Front, back	Latin
Tanzania	Voter ID[BETA]	Kadi ya mpiga kura, Voter Card	Front	Latin
Togo	ID Card	Permis de conduire	Front, back	Latin
Tunisia	Driving License	رخصة قيادة	Front	Latin
Tunisia	ID Card	بطاقة التعريف الوطنية	Front	Latin
Tunisia	Paper Passport	جواز سفر	Bio-data page	Latin
Turkey	Driving License	Sürücü belgesi	Front	Latin
Turkey	ID Card	Kimlik Kartı	Front, back	Latin
Turkey	Paper Passport	Pasaport	Bio-data page	Latin
Turkey	Residence Permit[BETA]	İkamet İzni	Front, back	Latin
Turkey	Polycarbonate Passport	Pasaport	Bio-data page	Latin
UAE	Driving License	رخصة القيادة	Front, back	Latin
UAE	ID Card	بطاقة الهوية	Front, back	Arabic, Latin
UAE	Paper Passport	جواز سفر	Bio-data page	Arabic, Latin
UAE	Resident ID	بطاقة الهوية الوطنية	Front, back	Arabic, Latin
Uganda	Driving License		Front	Latin
Uganda	ID Card		Front, back	Latin
Zimbabwe	ID Card	National registration card (NRC)	Front, back	Latin
Zimbabwe	Paper Passport		Bio-data page	Latin

Supported identity documents (North America)

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Bermuda	Driving License[BETA]		Front	Latin
Canada	Citizenship Certificate[BETA]	Canada citizenship card, Carte de citoyenneté canadienne	Front, back	Latin
Canada	Paper Passport	Passport, Passeport	Bio-data page	Latin
Canada	Residence Permit	Permanent residence (PR) card, Carte de résident permanent	Front, back	Latin
Canada	Social Security Card[BETA]	Social insurance card (SIN card), Carte d'assurance sociale (Carte de NAS)	Front	Latin
Canada	Tribal ID	Certificate of Indian Status,Certificat de statut Indien	Front, back	Latin
Canada	Weapon Permit	Possesion and Aquisition License (PAL), Permis de possession et d'acquisition	Front	Latin
Canada, Alberta	Driving License		Front, back	Latin
Canada, Alberta	ID Card		Front, back	Latin
Canada, British Columbia	Driving License		Front, back	Latin
Canada, British Columbia	Driver License, Public Services Card (Combined)		Front, back	Latin
Canada, British Columbia	ID Card		Front, back	Latin
Canada, British Columbia	Minors Public Services Card		Front, back	Latin
Canada, British Columbia	Public Services Card		Front, back	Latin
Canada Manitoba	Driving License		Front, back	Latin
Canada Manitoba	ID Card		Front, back	Latin
Canada, New Brunswick	Driving License	Permis de conduire	Front, back	Latin
Canada, Newfoundland and Labrador	Driving License		Front, back	Latin
Canada, Nova Scotia	Driving License		Front, back	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Canada, Nova Scotia	ID Card[BETA]		Front, back	Latin
Canada, Nova Scotia	Driving License		Front, back	Latin
Canada, Nova Scotia	ID Card[BETA]		Front, back	Latin
Canada, Ontario	Driving License		Front, back	Latin
Canada, Ontario	ID Card	Photo card	Front, back	Latin
Canada, Quebec	Driving License	Permis de conduire	Front, back	Latin
Canada, Saskatchewan	Driving License		Front, back	Latin
Canada, Saskatchewan	ID Card[BETA]		Front, back	Latin
Canada, Yukon	Driving License	Permis de conduire	Front, back	Latin
USA	Border Crossing Card	BCC	Front, back	Latin
USA	Global Entry Card		Front, back	Latin
USA	Green Card	Permanent resident card	Front, back	Latin
USA	Military ID	Common Access Card (CAC)	Front, back, vertical	Latin
USA	Nexus Card[BETA]		Front, back	Latin
USA	Paper Passport		Bio-data page	Latin
USA	Passport Card		Front, back	Latin
USA	Polycarbonate Passport		Bio-data page	Latin
USA	Social Security Card[BETA]		Front	Latin
USA	Veteran ID	VIC	Front	Latin
USA	Work Permit	Employment authorization document, EAD Card	Front, back	Latin
USA, Alabama	Driving License		Front, back, vertical	Latin
USA, Alabama	ID Card		Front, back, vertical	Latin
USA, Alaska	Driving License		Front, back	Latin
USA, Alaska	ID Card		Front, back	Latin
USA, Arizona	Driving License		Front, back, vertical	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
USA, Arizona	ID Card		Front, back, vertical	Latin
USA, Arkansas	Driving License		Front, back, vertical	Latin
USA, Arkansas	ID Card		Front, back, vertical	Latin
USA, California	Driving License		Front, back, vertical	Latin
USA, California	ID Card		Front, back, vertical	Latin
USA, Colorado	Driving License		Front, back, vertical	Latin
USA, Colorado	ID Card		Front, back	Latin
USA, Connecticut	Driving License		Front, back, vertical	Latin
USA, Connecticut	ID Card		Front, back	Latin
USA, Delaware	Driving License		Front, back, vertical	Latin
USA, District of Columbia	Driving License		Front, back, vertical	Latin
USA, District of Columbia	ID Card		Front, back, vertical	Latin
USA, Florida	Driving License		Front, back, vertical	Latin
USA, Florida	ID Card		Front, back, vertical	Latin
USA, Georgia	Driving License		Front, back, vertical	Latin
USA, Georgia	ID Card		Front, back, vertical	Latin
USA, Hawaii	Driving License		Front, back, vertical	Latin
USA, Hawaii	ID Card		Front, back	Latin
USA, Idaho	Driving License		Front, back, vertical	Latin
USA, Idaho	ID Card		Front, back	Latin
USA, Illinois	Driving License		Front, back, vertical	Latin
USA, Illinois	ID Card		Front, back, vertical	Latin
USA, Indiana	Driving License		Front, back	Latin
USA, Indiana	ID Card		Front, back	Latin
USA, Iowa	Driving License		Front, back, vertical	Latin
USA, Iowa	ID Card		Front, back, vertical	Latin
USA, Kansas	Driving License		Front, back, vertical	Latin
USA, Kansas	ID Card		Front, back, vertical	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
USA, Kentucky	Driving License		Front, back, vertical	Latin
USA, Kentucky	ID Card		Front, back, vertical	Latin
USA, Louisiana	Driving License		Front, back	Latin
USA, Maine	Driving License		Front, back, vertical	Latin
USA, Maine	ID Card		Front, back	Latin
USA, Maryland	Driving License		Front, back, vertical	Latin
USA, Maryland	ID Card		Front, back, vertical	Latin
USA, Massachusetts	Driving License		Front, back, vertical	Latin
USA, Massachusetts	ID Card		Front, back, vertical	Latin
USA, Michigan	Driving License		Front, back, vertical	Latin
USA, Michigan	ID Card		Front, back, vertical	Latin
USA, Minnesota	Driving License		Front, back, vertical	Latin
USA, Minnesota	ID Card		Front, back, vertical	Latin
USA, Missouri	Driving License		Front, back, vertical	Latin
USA, Missouri	ID Card		Front, back, vertical	Latin
USA, Montana	Driving License		Front, back	Latin
USA, Montana	ID Card		Front, back	Latin
USA, Nebraska	Driving License		Front, back, vertical	Latin
USA, Nebraska	ID Card		Front, back	Latin
USA, Nevada	Driving License		Front, back, vertical	Latin
USA, Nevada	ID Card		Front, back, vertical	Latin
USA, New Hampshire	Driving License		Front, back, vertical	Latin
USA, New Hampshire	ID Card[BETA]		Front, back	Latin
USA, New Jersey	Driving License		Front, back, vertical	Latin
USA, New Jersey	ID Card		Front, back, vertical	Latin
USA, New Mexico	Driving License		Front, back, vertical	Latin
USA, New Mexico	ID Card		Front, back	Latin
USA, New York	Driving License		Front, back, vertical	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
USA, New York	ID Card		Front, back, vertical	Latin
USA, New York City	ID Card		Front, back	Latin
USA, North Carolina	Driving License		Front, back, vertical	Latin
USA, North Carolina	ID Card		Front, back, vertical	Latin
USA, North Dakota	Driving License		Front, back, vertical	Latin
USA, North Dakota	ID Card[BETA]		Front, back	Latin
USA, Ohio	Driving License		Front, back, vertical	Latin
USA, Ohio	ID Card		Front, back, vertical	Latin
USA, Oklahoma	Driving License		Front, back, vertical	Latin
USA, Oklahoma	ID Card		Front, back, vertical	Latin
USA, Oregon	Driving License		Front, back, vertical	Latin
USA, Oregon	ID Card		Front, back	Latin
USA, Pennsylvania	Driving License		Front, back, vertical	Latin
USA, Pennsylvania	ID Card		Front, back, vertical	Latin
USA, Rhode Island	Driving License		Front, back, vertical	Latin
USA, Rhode Island	ID Card		Front, back	Latin
USA, South Carolina	Driving License		Front, back, vertical	Latin
USA, South Carolina	ID Card		Front, back, vertical	Latin
USA, South Dakota	Driving License		Front, back, vertical	Latin
USA, South Dakota	ID Card[BETA]		Front, back	Latin
USA Tennessee	Driving License		Front, back, vertical	Latin
USA Tennessee	ID Card		Front, back, vertical	Latin
USA, Texas	Driving License		Front, back, vertical	Latin
USA, Texas	ID Card		Front, back, vertical	Latin
USA, Texas	Weapon Permit	License to Carry a Handgun (LTC)	Front	Latin
USA, Utah	Driving License		Front, back, vertical	Latin
USA, Utah	ID Card		Front, back, vertical	Latin
USA, Vermont	Driving License		Front, back	Latin
USA, Virginia	Driving License		Front, back, vertical	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
USA, Virginia	ID Card		Front, back	Latin
USA, Washington	Driving License		Front, back, vertical	Latin
USA, Washington	ID Card		Front, back, vertical	Latin
USA, West Virginia	Driving License		Front, back	Latin
USA, Wisconsin	Driving License		Front, back, vertical	Latin
USA, Wisconsin	ID Card		Front, back	Latin
USA, Wyoming	Driving License		Front, back	Latin
USA, Wyoming	ID Card		Front, back	Latin

Supported identity documents (Oceania)

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
Australia	Paper Passport		Bio-data page	Latin
Australia, Australian Capital Territory	Driving License		Front	Latin
Australia, New South Wales	Driving License		Front	Latin
Australia, New South Wales	ID Card		Front	Latin
Australia, Northern Territory	Driving License[BETA]		Front, back	Latin
Australia, Northern Territory	Proof Of Age Card	NT Evidence of age card	Front, back	Latin
Australia, Queensland	Driving License		Front, back	Latin
Australia, South Australia	Driving License		Front, back	Latin
Australia, South Australia	Proof Of Age Card		Front	Latin
Australia, Tasmania	Driving License		Front, back	Latin
Australia, Victoria	Driving License		Front, back	Latin
Australia, Victoria	Proof Of Age Card		Front	Latin
Australia, Western Australia	Driving License		Front, back	Latin

Country or Region	Document Type	Localized Document Name	Supported side and orientation	Supported scripts
New Zealand	Driving License		Front	Latin
New Zealand	Polycarbonate Passport	Uruwhenua	Bio-data page	Latin

Related Topics

About ClearID Self-Service Kiosk on page 560

14

Troubleshooting

Troubleshoot common issues that can occur.

This section includes the following topics:

Plugin installed, but missing from Security Desk and Config Tool

If the **Properties** tab for the plugin is missing, then the plugin is not installed on your local machine. The plugin must be installed on a Genetec™ Server (main or expansion).

To help you troubleshoot this issue, refer to the possible causes and their respective solutions below.

Possible symptoms:

- In Config Tool, you see the plugin in the **Plugins** task, and you can add a new plugin role, but the new role is missing the **Properties** tab.
- In Security Desk, the plugin does not appear on the *Options* page.

Description of cause: The plugin is not installed on the local computer, the license (certificate) is invalid, or you are missing required user privileges.

Solution 1: Install the plugin on your local computer.

Solution 2: Make sure that a Genetec™ Server has the plugin installed, the role created, and is configured correctly.

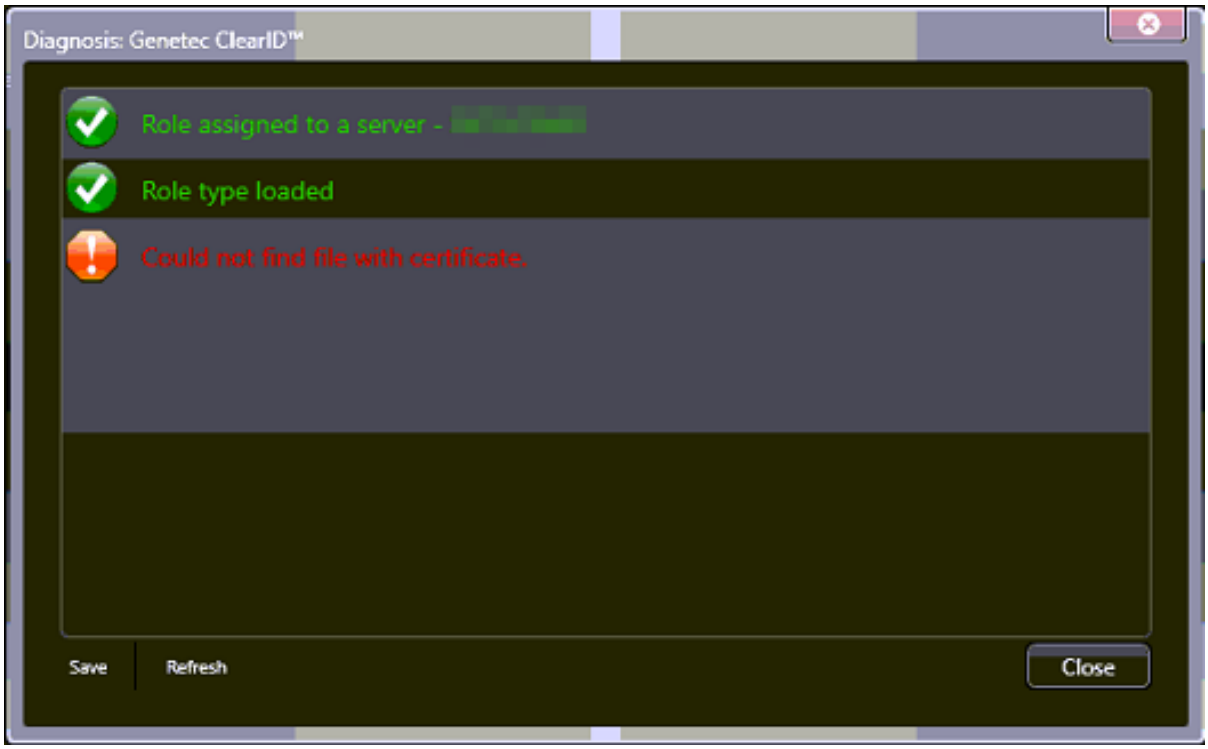
Solution 3: Confirm that the plugin is installed on your Security Center computer: from the homepage in Security Desk or Config Tool, click **About** > **Installed components** and look in the list for the entry *Genetec.Iams.SCPlugin.Client*.

Solution 4: Confirm that your system has a license (certificate) for the plugin: from the homepage in Security Desk or Config Tool, click **About** > **Certificates**, look in the list for the name of the plugin, and make sure that your access permissions are set to **Unlimited** or a number representing the number of licenses.

Plugin role could not find file with certificate

When adding the Genetec ClearID™ plugin role, the role is unable to start and a Could not find file with certificate error message is displayed.

In Config Tool, in the *Roles* section of the *System* task the following error message is displayed in the diagnosis dialog.



Cause

The CD-SC-PLUGIN license is missing for that system (GSC does not have the ClearID license part).

Solution

Make sure that the plugin role is correctly configured with the required license part.

1. In Config Tool, click **About** > **Certificates** and look for `ClearID`.
2. If the ClearID certificate is not found, add the CD-SC-PLUGIN part to the license, apply the license to the system, and restart the system.

Custom fields not displayed in Security Desk

If custom fields are not displayed in Security Desk, check the user privileges and ensure that the relevant user or user groups have been configured for the custom field.

To troubleshoot the issue, learn about the possible causes and their respective solutions.

Incorrect user privileges

Description of cause: A custom field is not displayed because the user lacks the required privileges.

Solution: Add the required privileges.

1. From the Config Tool homepage, open the *User management* task.
2. Select the relevant user, and click the **Privileges** tab.
3. Set the following privileges to **Allow**:
   - **Application privileges** > **Security Desk**
   - **Application privileges** > **Config Tool**
   - **Administrative privileges** > **System management** > **View role properties**
   - **Administrative privileges** > **System management** > **View server properties**
   - **Task privileges** > **Administration** > **Plugins**
4. (Optional) Set the custom field privileges that you require to **Allow**.
   - **Administrative privileges** > **Access control management** > **View cardholder group properties** > **Modify cardholder group properties** > **Modify custom fields**
   - **Administrative privileges** > **Access control management** > **View cardholder properties** > **Modify cardholder properties** > **Modify custom fields**
   - **Administrative privileges** > **Access control management** > **View credential properties** > **Modify credential properties** > **Modify custom fields**
   - **Administrative privileges** > **Access control management** > **View visitor properties** > **Modify visitor properties** > **Modify custom fields**
   - **Administrative privileges** > **System management** > **View general settings** > **Modify custom field definitions**
5. Click **Apply**.

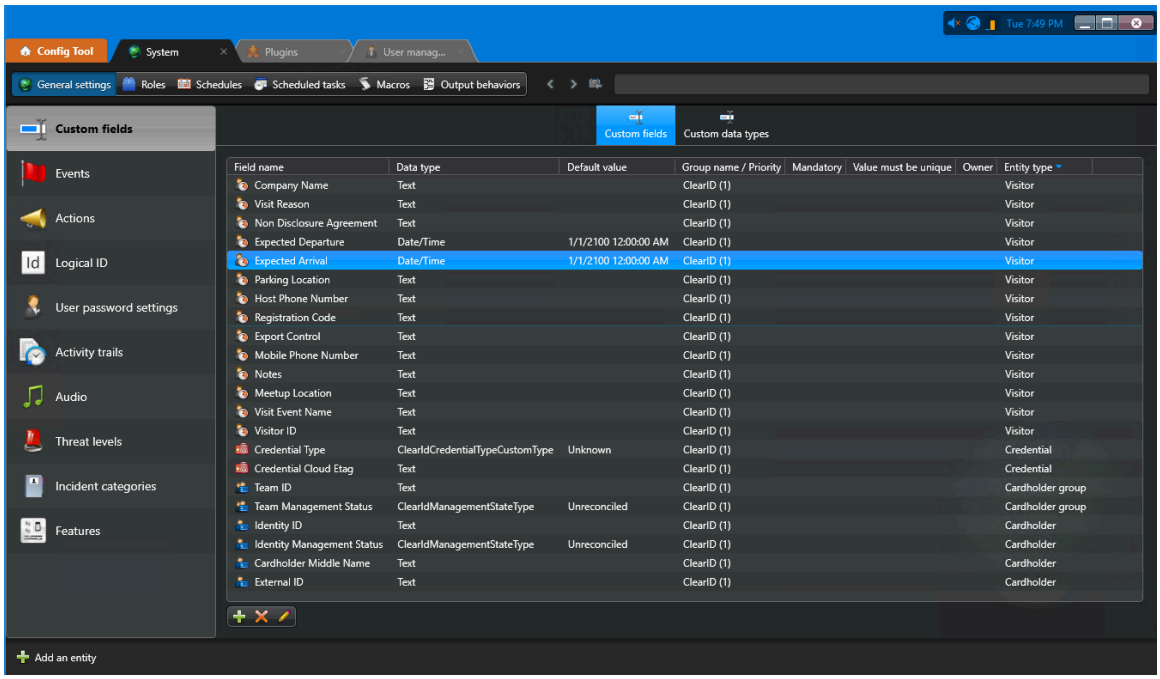
Custom field not configured for user or user group

Description of cause: The custom field has not been configured to display to the user or user group.

Solution: Configure the custom field to display to the user or user group.

1. From the Config Tool homepage, open the *System* task.
2. Click **General settings** > **Custom Fields**.

3. Select the custom field that is not displayed to the user. For example, **Expected Arrival**.



4. Click **Edit the item** ( ) to modify the custom field settings.
5. In the *Security* section of the *Edit custom field* dialog box, click **Add an item** ( ).

6. Navigate to and select a user or user group from the list and click **OK**.

   In the following example, we configured the *Expected Arrival* custom field so that it is visible to the *Genetec Receptionists* user group.

7. Click **Save and close** then click **Apply**.

Related Topics

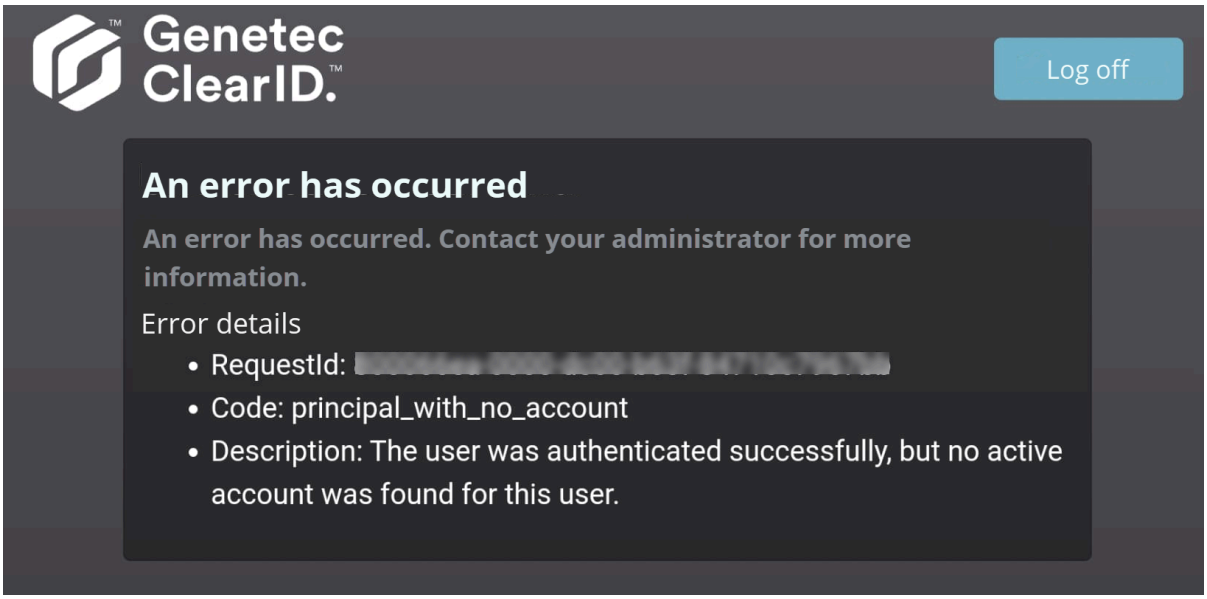
Granting user privileges on page 99
About custom fields on page 101

No active account found for user

If no active account was found for the user during single sign-on (SSO) logon, use another identity or grant access to the Genetec ClearID™ web portal.

Cause

The user was authenticated successfully, but no active account was found for the user.



The identity associated with the email that was used to log on does not have web portal access.

Solution

Grant user access to the web portal.

Visit email notifications not received by visitors

If visitors aren't receiving email notifications, check that the visit event or visit area request has been approved.

To troubleshoot the issue, learn about the possible causes and their respective solutions.

Cause

Visit email notifications aren’t received because the visit event or visit area request wasn’t approved.

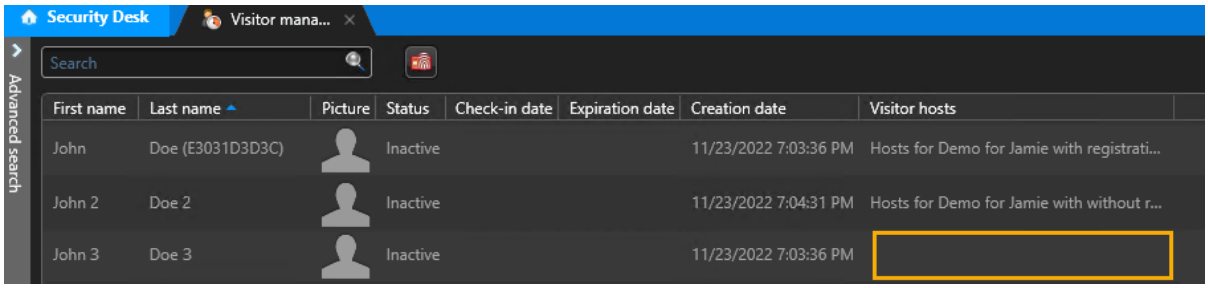
Solution

Review any visit event or visit area requests to identify the request waiting for approval:

1. Approve area access requests.
2. Approve visit events.

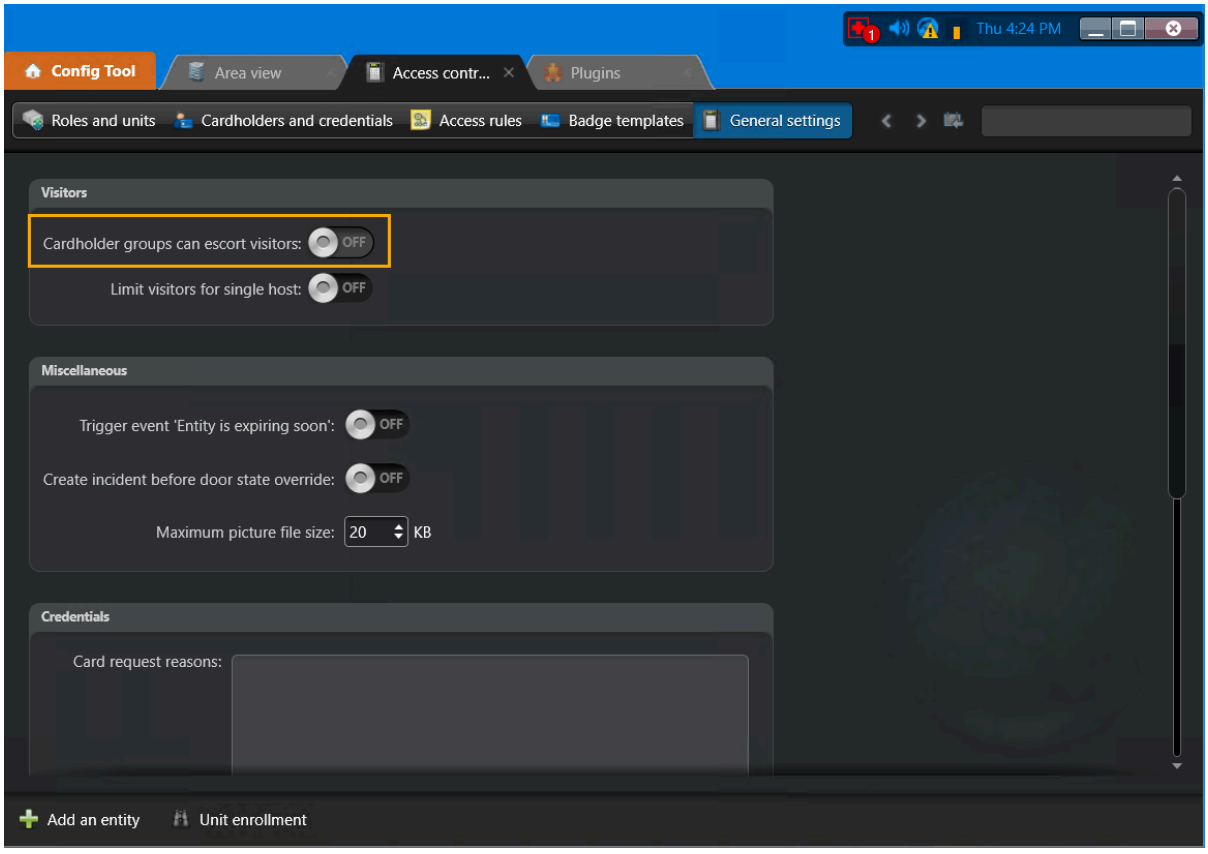
Visitor hosts fields in Security Desk are empty

If the **Visitor hosts** fields in Security Desk are empty, then the **Cardholder groups can escort visitors** setting might not be configured correctly for Genetec ClearID™.



Cause

In the *Visitors* section of the *Access control* task, the **Cardholder groups can escort visitors** setting in Config Tool could be disabled (OFF).

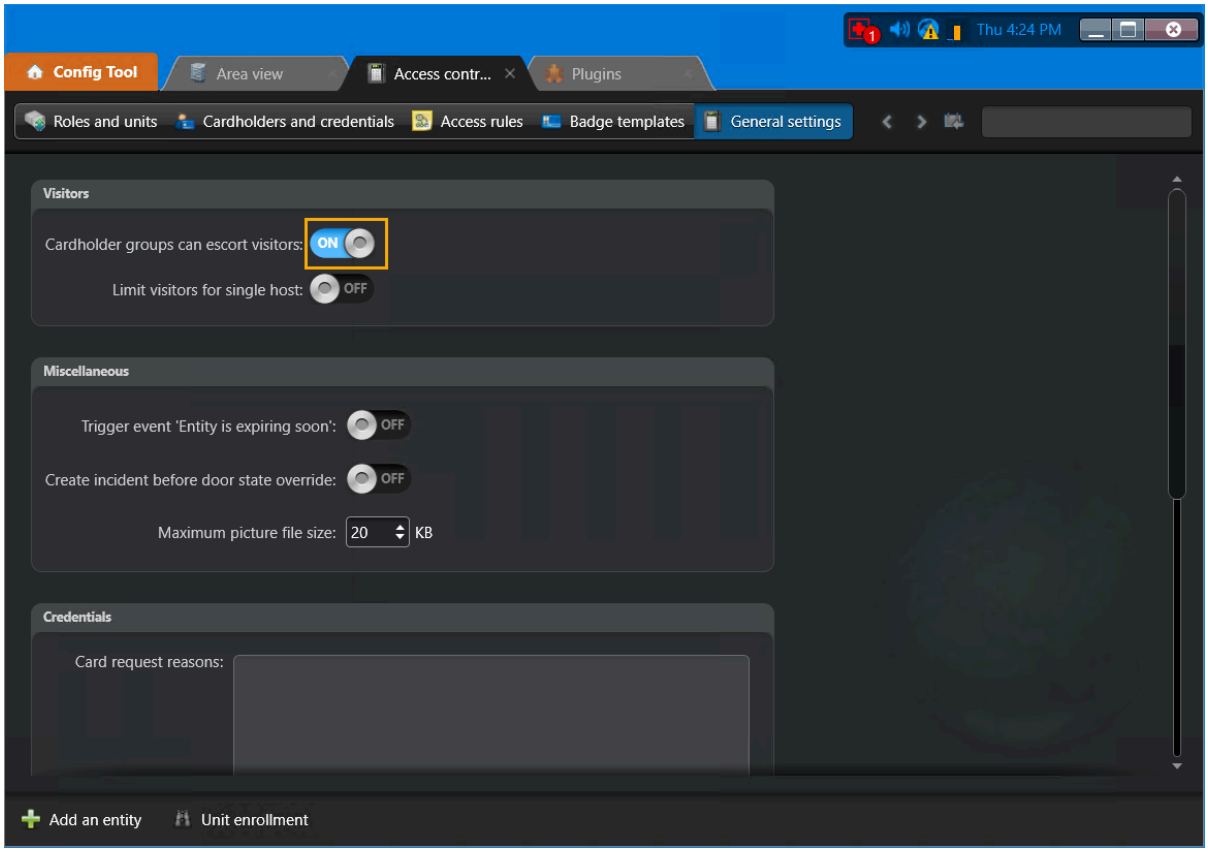


Solution

In the *Visitors* section of the *Access control* task, make sure that the **Cardholder groups can escort visitors** setting is enabled (ON).

1. From the Config Tool homepage, open the *Access control* task.
2. Click **General settings**.

3. Click or slide the **Cardholder groups can escort visitors** option to the **ON** position.



4. (Optional) In ClearID, create a new visit request to verify that the option is working as expected.
5. (Optional) In Security Desk, check that the **Visitor hosts** field contains host information.

Connectivity issues (One Identity Synchronization Tool)

If you encounter connectivity issues when using the Genetec ClearID™ One Identity Synchronization Tool, check your API integration or Azure AD application connection details.

To help you troubleshoot the issue, learn about the possible causes and their respective solutions.

Unable to connect to Genetec ClearID™

Description: The synchronization tool is unable to connect to ClearID.

Solution: Review the One Identity *ConfigurationTool* logs.

1. Click , then click **Open logs folder**.

   TIP: You can also open the *ConfigurationTool* logs manually here:

   %ProgramData%\Genetec\OneIdentity\Logs\ConfigurationTool

2. Review the One Identity *ConfigurationTool* logs for error messages related to ClearID connectivity issues.
3. Check your API integration connection.
   a. Click **Administration** > **Automation** and select your API integration.
   b. Check that your API integration key and Client ID details are correct.
4. Check your connection settings.

Unable to connect to Azure AD

Description: The synchronization tool is unable to connect to Azure Active Directory.

Solution: Review the One Identity *ConfigurationTool* logs.

1. Click , then click **Open logs folder**.

   TIP: You can also open the *ConfigurationTool* logs manually here:

   %ProgramData%\Genetec\OneIdentity\Logs\ConfigurationTool

2. Review the One Identity *ConfigurationTool* logs for error messages related to Azure AD connectivity issues.
3. Check your Azure AD application connection details.

Related Topics

Synchronizing identities using One Identity on page 502

Data synchronization issues (One Identity Synchronization Tool)

If you encounter connectivity issues when using the Genetec ClearID™ One Identity Synchronization Tool, check your service logs for errors. To help you troubleshoot the issue, learn about the possible causes and their respective solutions.

Missing data fields

Description: Data fields are missing.

Solution: Review the One Identity *Service* logs.

1. Click , then click **Open logs folder**.

   TIP: You can also open the *ConfigurationTool* logs manually here:

   ```
   %ProgramData%\Genetec\OneIdentity\Logs\Service
   ```

2. Review the One Identity *Service* logs for error messages related to missing data fields.

   For more information about attribute fields, see One Identity Synchronization Tool attribute fields.

3. Check your Azure AD API permissions.

Missing name fields (first name, last name)

Description: Name fields (first name or last name) are missing.

Solution: Review the One Identity *Service* logs.

1. Click , then click **Open logs folder**.

   TIP: You can also open the *ConfigurationTool* logs manually here:

   ```
   %ProgramData%\Genetec\OneIdentity\Logs\Service
   ```

2. Review the One Identity *Service* logs for error messages related to name fields.

   For more information about attribute fields, see One Identity Synchronization Tool attribute fields.

3. Check your Azure AD API permissions.

Missing email addresses

Description: Email address fields are missing.

Solution: Review the One Identity *Service* logs.

1. Click , then click **Open logs folder**.

   TIP: You can also open the *ConfigurationTool* logs manually here:

   ```
   %ProgramData%\Genetec\OneIdentity\Logs\Service
   ```

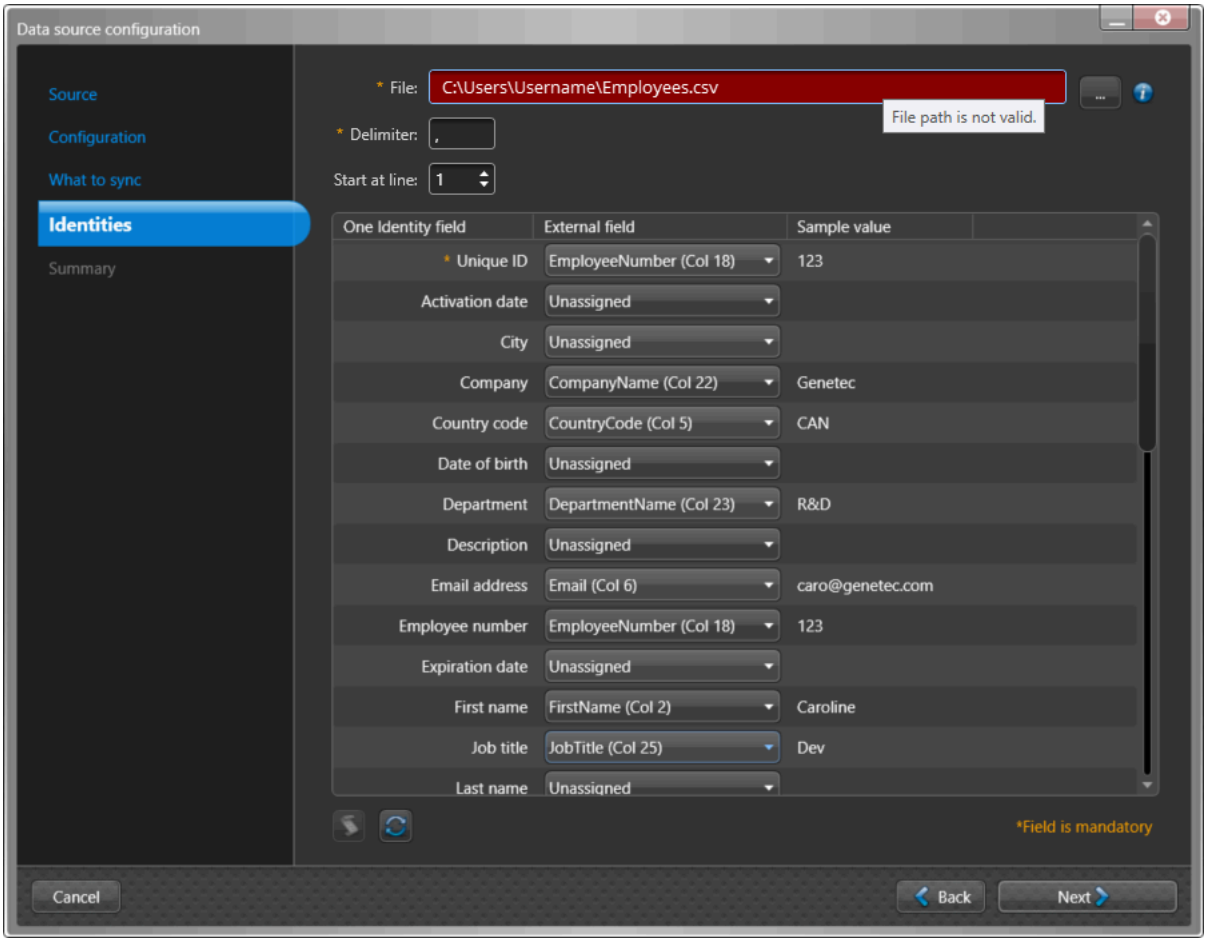
2. Review the One Identity *Service* logs for error messages related to email address fields.

   For more information about attribute fields, see One Identity Synchronization Tool attribute fields.

3. Check your Azure AD API permissions.

File path is not valid

Description: User permission issues encountered when using CSV files as the data source for **Identities** because the file path is not valid.



Solution:

BEST PRACTICE: To avoid user permission issues when using CSV files with the ClearID One Identity Synchronization Tool, save your files to a *C:* or *C:\temp* folder location. Do not save your CSV files in user-controlled file or folder locations (*c:\Users* folders or *desktop* folder location) or you might encounter File path is not valid user permissions issues.

Related Topics

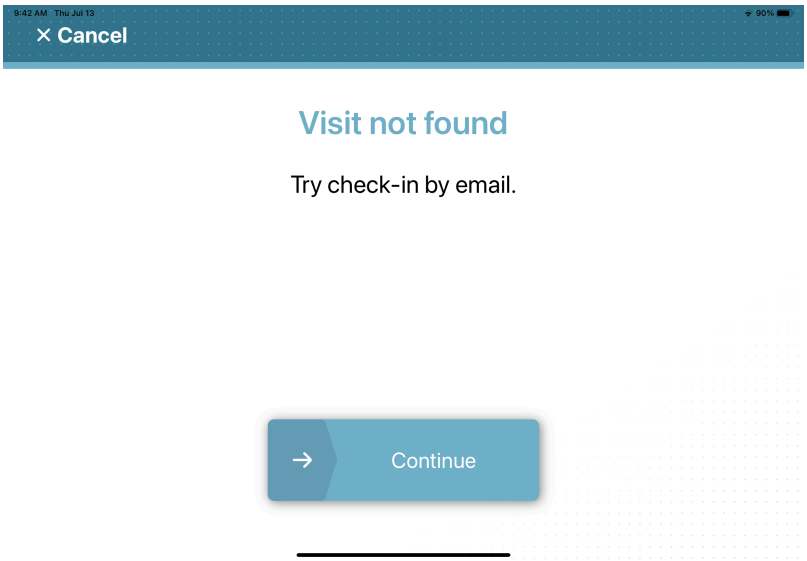
Synchronizing identities using One Identity on page 502

Self-Service Kiosk issues

If the Genetec ClearID™ Self-Service Kiosk check-in function or the kiosk does not work as expected, you can perform additional troubleshooting steps.

Visitor invite or visit event not found

Description: You do not see your visitor invite during check-in.



The *visit not found* issue can occur for various reasons:

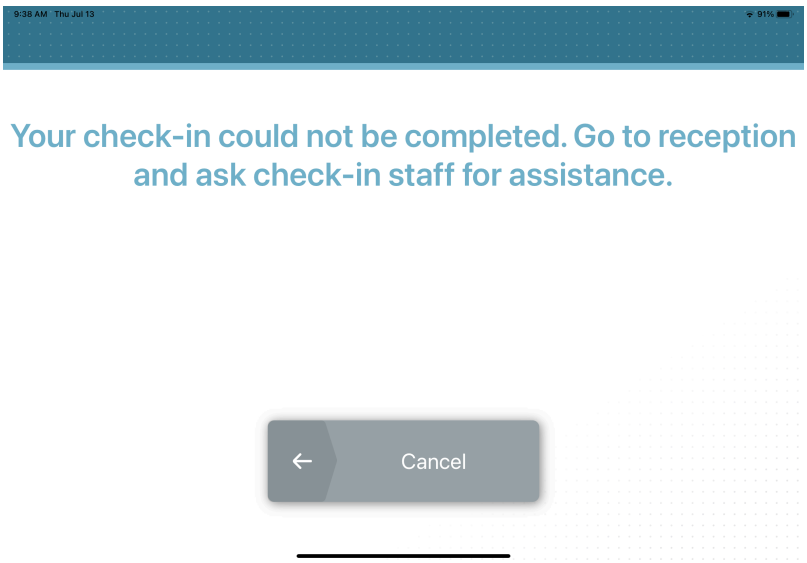
- Visitor check-in is too early (1hr+ before event start time).
- Visitor check-in is too late (1hr+ after event end time).
- Visitor is not listed in visit event invite.
- The visitor name in the visit event invite contains a mistake or typo.

Solution:

- Check the visit event start and end times. Visitors can check in up to 1 hour before or after a visit event.
- Check visitor names listed in the visit event. Look for any visitors not listed or any mistakes in the visitor details.

Check-in could not be completed

Description: You are unable to complete your check-in.



Solution: Check your site and area settings. Self check-in can fail due to one or more of the following:

1. Visitor management is not enabled for the site.
   a. In Genetec ClearID™, click **Organization** > **Sites**.
   b. Select your site and click **Visitor Management**.
   c. Select **Enable visitor management for this site**.
   d. Click **Save**.
2. Visitor management permissions for the site have not been configured.
   a. In ClearID, click **Organization** > **Sites**.
   b. Select your site and click **Visitor Management** > **Permissions**.
   c. Check identity permissions.
   d. Modify permissions as required and click **Save**.

      For example, Add role permissions or give all identities access to invite visitors.
3. Visitor management is enabled for the site but no areas are defined or there is no default area.
   a. In ClearID, check visitor management is enabled for the area. (**Areas** > **Select an area** > **Visitor Management**).
   b. Check the **Automatically add this area when creating visit requests** is enabled.
4. Visitor management is enabled for the site and there is at least one default area under that site. However, the host does not have the authority to invite visitors for that site.
   a. Refer to Step 2.
5. Site is set to approval required. Visit event approval workflow should be set to **No approval required**.
   a. In ClearID, click **Organization** > **Sites** and select your site.
   b. Click **Visitor Management**, then in *Advanced* section check **Visitor event approval workflow** is set to **No approval required**.

Camera errors

Description: The Self-Service Kiosk can occasionally encounter the following camera issues:

- Unable to initialize the front camera.
- An error was encountered while configuring the camera. Try again.

Solution: Check the following:

1. On the iPad, tap **Settings** and scroll down to the **Self-Service Kiosk** app then tap **Camera** to enable the camera.
2. On the iPad, tap **Settings** > **Privacy & Security** and check that the **Self-Service Kiosk** has access to the camera.

TIP: These settings might not be visible on your iPad if you have not used the Scan QR code function before. In this situation, you can try the following: Tap **Check-in** > **QR code**, then tap **Cancel** and try the previous solution steps again.

Self-Service Kiosk label printer issues

If the Genetec ClearID™ Self-Service Kiosk label printer is not performing as expected, you can check the configuration, check the hardware, or perform additional troubleshooting steps.

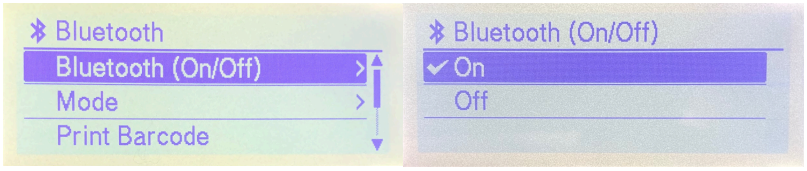
To help you troubleshoot Self-Service Kiosk label printer issues, refer to the possible causes and their respective solutions that follow.

No Bluetooth label printers detected

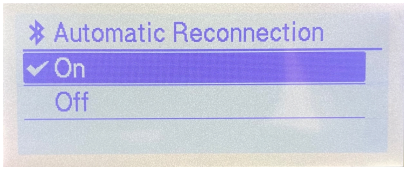
Description: No Bluetooth label printers were detected. This issue can be caused by a configuration or hardware issue.

Solution:

1. Check that the printer is powered on and ready for use.
2. Check that Bluetooth is enabled on the label printer.
   a. In the **Settings** menu, select **Bluetooth** > **Bluetooth (On/Off)** > **On** and press **OK**.



   b. In the **Settings** menu, select **Bluetooth** > **Automatic Reconnection (On/Off)** > **On** and press **OK**.



3. Check that Bluetooth is enabled in the ClearID Self-Service Kiosk mobile app.
4. Check that Bluetooth is enabled on the iPad.
5. Check that the printer is paired with the ClearID Self-Service Kiosk.
6. (Optional) Perform a hard reset of the Self-Service Kiosk iPad.
   a. Configure your Self-Service Kiosk iPad.
   b. Do one of the following:
      - Configuring the Self-Service Kiosk label printer for Bluetooth mode (Brother QL-820NWBc or QL-820NWB) on page 585.
      - Configuring the Self-Service Kiosk label printer for Bluetooth mode (Brother TD-4550DNWB) on page 594.
   c. Select a label printer.
   d. Print a test badge.

No Wi-Fi label printers detected

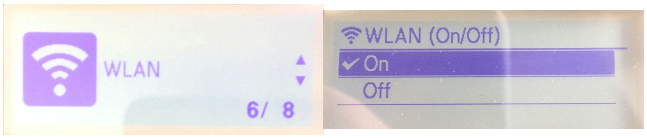
Description: No label printers were detected on the Wi-Fi network. This issue can be caused by a configuration or hardware issue.

Solution:

1. Check that the printer is powered on and ready for use.
2. Check that the Wi-Fi network is available.

   The Wi-Fi network must be enabled for use and support the following:

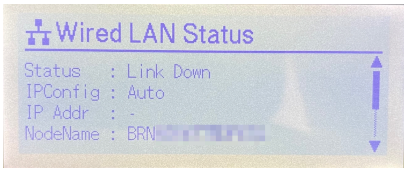
   - Bonjour - required for device search.
   - SNMP - required to check printer status information.
   - UDP or TCP Port 9100 - required to send print data.
3. Check that Wi-Fi is enabled on the label printer.
   a. In the **Settings** menu, select **WLAN** > **WLAN (On/Off)** > **On** and press **OK**.



4. Check that Wi-Fi is enabled on the iPad.
5. Check that the Self-Service Kiosk iPad and the label printer are on the same Wi-Fi network.
6. (Optional) Perform a hard reset of the Self-Service Kiosk iPad.
   a. Configure your Self-Service Kiosk iPad.
   b. Do one of the following:
      - Configuring the Self-Service Kiosk label printer for Wi-Fi mode (Brother QL-820NWBc, QL-820NWB, or QL-810W) on page 588.
      - Configuring the Self-Service Kiosk label printer for Wi-Fi mode (Brother TD-4550DNWB) on page 597.
   c. Select a label printer.
   d. Print a test badge.

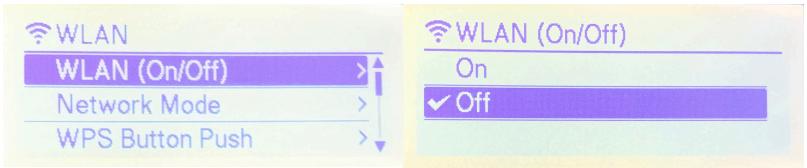
No Ethernet label printers detected

Description: The label printer is showing the **Wired LAN Status** Link Down.

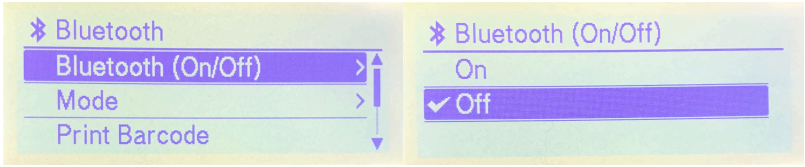


Solution:

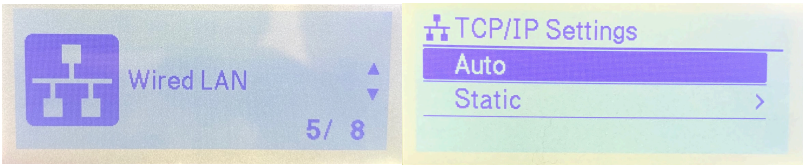
1. Check that the printer is powered on and ready for use.
2. Check that the Wi-Fi function on the label printer is turned off.
   a. From the label printer **Settings** menu, turn OFF **WLAN** (Wi-Fi).



3. Check that the Bluetooth function on the label printer is turned off.
   a. In the **Settings** menu, select **Bluetooth** > **Bluetooth (On/Off)** > **Off** and press **OK**.



4. Check that the Ethernet network is available.
5. Check that Ethernet is enabled on the label printer.
   a. In the **Settings** menu, select **Wired LAN** > **TCP/IP Settings** > **Auto** and press **OK**.



6. Check that the printer is connected to a LAN port and not to a WAN port (either on your router or your organizations network).
7. Verify that you are using the correct type of LAN cable.
   BEST PRACTICE: Use a straight-through Category 5 (or greater) twisted-pair cable for 10BASE-T or 100BASE-TX Fast Ethernet Network.
8. (Optional) Perform a hard reset of the Self-Service Kiosk iPad.
   a. Configure your Self-Service Kiosk iPad.
   b. Do one of the following:
      - Configuring the Self-Service Kiosk label printer for Ethernet mode (Brother QL-820NWBc or QL-820NWB) on page 591.
      - Configuring the Self-Service Kiosk label printer for Ethernet mode (Brother TD-4550DNWB) on page 600.
   c. Select a label printer.
   d. Print a test badge.

Printing: A printing error has occurred. There is no paper in the printer.

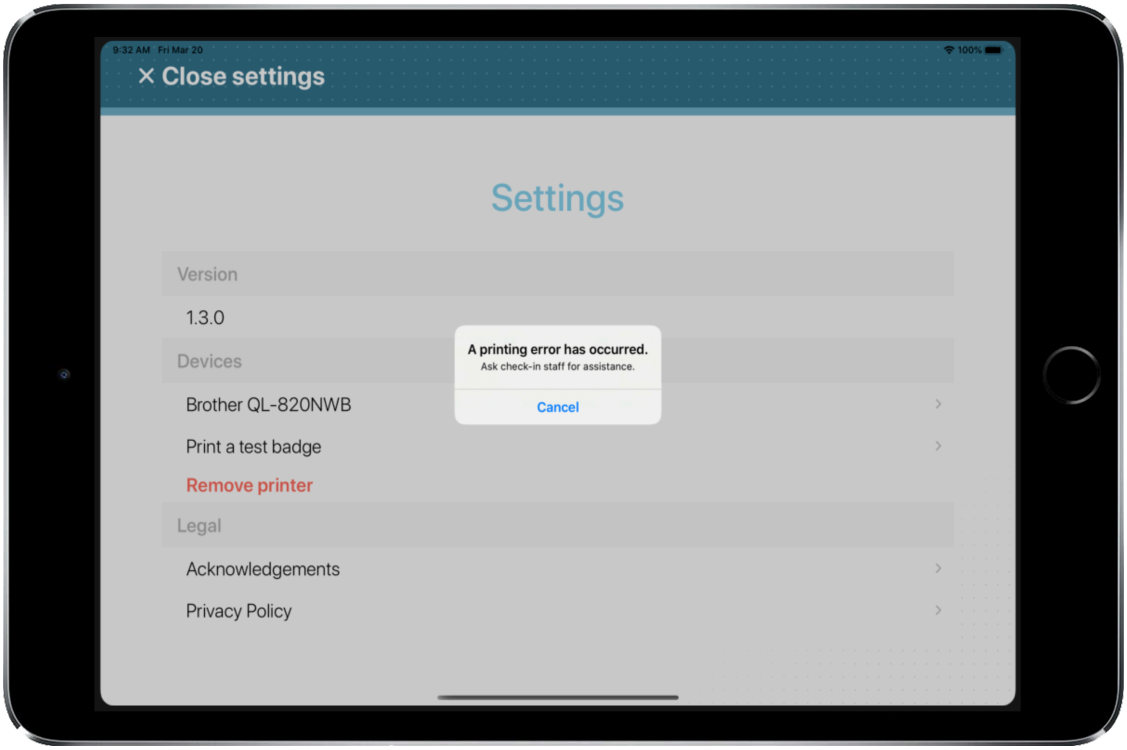
Description: The label printer has run out of labels or has jammed.

Solution:

1. Check for the end of the label roll and replace if necessary:
   - Brother QL-820NWBc or QL-820NWB: DK Roll - 62mm Black (Brother Part No: DK-2205) or 62mm Red and Black (Brother Part No: DK-2251)
   - Brother TD-4550DNWB: RD Roll - 57mm Black (Brother Part No: RD001U1S)
2. Check the printer for a label jam or feed error.

Brother QL-820NWBc or QL-820NWB: A printing error has occurred

Description: The Brother QL-820NWBc or QL-820NWB label printer has encountered an unknown printing error.



Solution:

1. Check the Label Printer Led Status indicators FAQ database for possible causes.
2. Check the Connecting to a Mobile Device section for possible causes.
3. Check the FAQs & Troubleshooting Printing section for possible causes.

Brother QL-820NWBc or QL-820NWB: Printer turns off unexpectedly

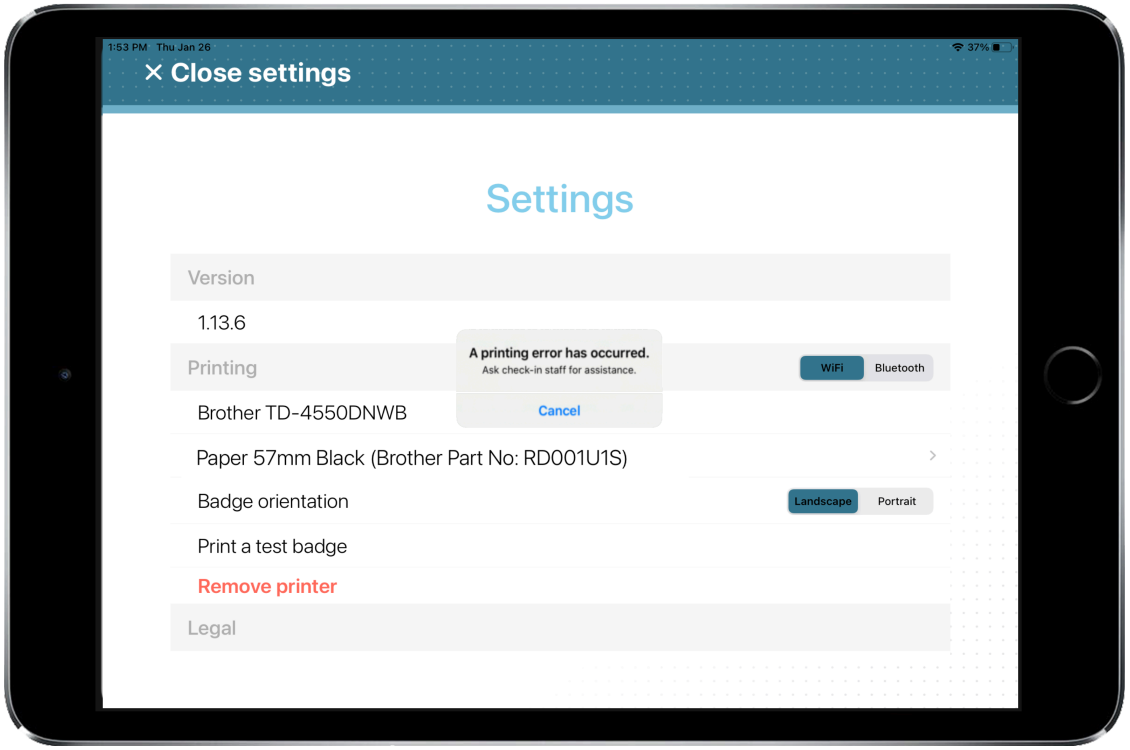
Description: The label printer turns off automatically at the same time every day.

Solution: Change the settings from the printer menu.

1. Press the **Menu** button.
2. Select **Settings** using the ▲ ▼ buttons, and then press the **OK** button.
3. Select **Auto Power Off** using the ▲ ▼ buttons, and then press the **OK** button.
4. Select **Adapter** using the ▲ ▼ buttons, and then press the **OK** button.
5. Select **Off** using the ▲ ▼ buttons, and then press the **OK** button.
6. (Optional) Also set the time to **Off** for [**Li-ion battery**], following the steps above.

Brother TD-4550DNWB: A printing error has occurred

Description: The Brother TD-4550DNWB label printer has encountered an unknown printing error.



Solution:

1. Check the Label Printer Led Status indicators FAQ database for possible causes.
2. Check the Connecting to a Mobile Device section for possible causes.
3. Check the FAQs & Troubleshooting Printing section for possible causes.

Brother TD-4550DNWB: Badge printout never arrives

Description: When printing a badge, the badges are sent to the printer but the printed badge never arrives.

Solution:

1. Check the printer LCD display to confirm you are not in a configuration or settings menu.

   NOTE: Leaving the printer in a configuration or settings menu can cause badge printing to be paused until you complete your changes.
2. If you left the printer in a configuration or settings menu, press the **Menu** button or use the printer controls to return to the homepage.

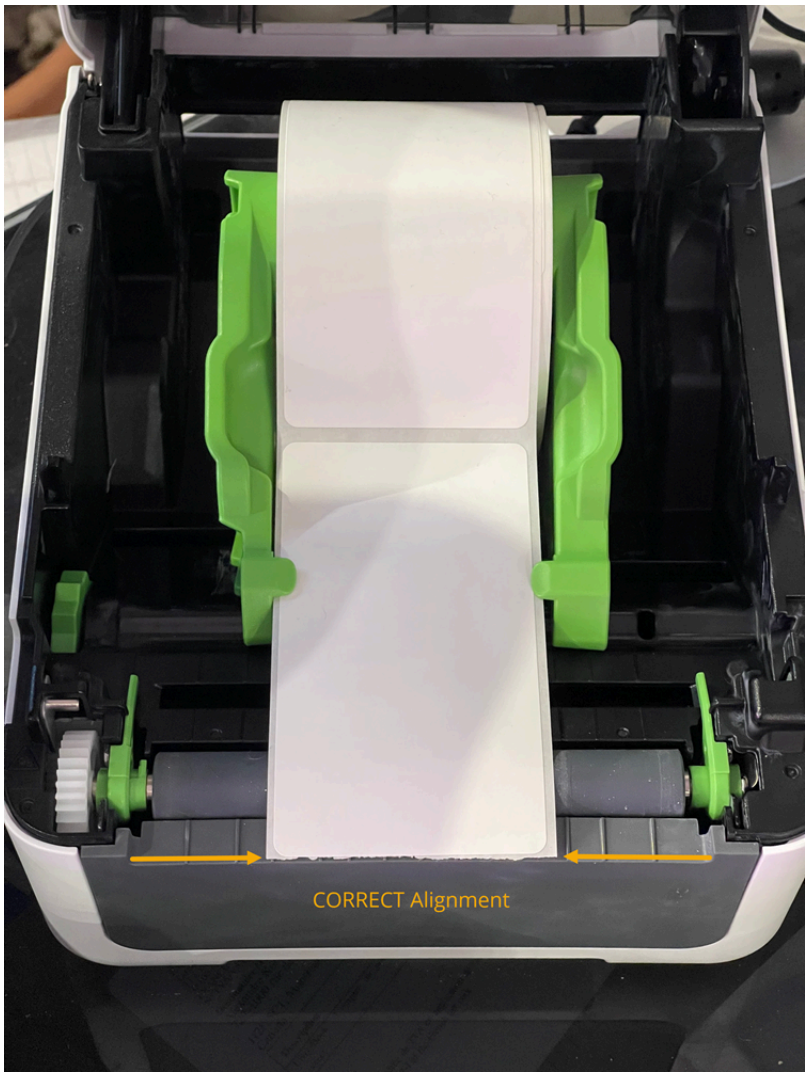
   After returning to the homepage, badge printing should resume as normal.

Brother TD-4550DNWB: Badges do not print as expected

Description: The label printer prints a partial label or label orientation appears to be messed up. For example, in some situations the printer can print half a badge or print across two labels.

Solution:

1. Before printing any badges, check your label alignment and orientation.



IMPORTANT: The first label must be aligned with the front edge of the printer to ensure correct printing. Make sure that none of the labels have advanced past the front edge of the printer before printing. The printer only detects the label edges automatically after printing the first label, if the first label is misaligned badge printing issues can occur.

For more information about how to load labels or sensor positioning for different label types, see Load the RD roll and Check the Sensor Position in the Brother online printer documentation.

Related Topics

Resetting the Self-Service Kiosk mobile app on page 613
Firewall ports on page 75

15

Additional resources

Need tech support or product information? Check out these resources.

This section includes the following topics:

Technical support

Genetec™ Technical Assistance Center (GTAC) is committed to providing its worldwide clientele with the best technical support services available. As a customer of Genetec Inc., you have access to TechDoc Hub, where you can find information and search for answers to your product questions.

- **Genetec TechDoc Hub:** Find articles, manuals, and videos that answer your questions or help you solve technical issues.

  Before contacting GTAC or opening a support case, it is recommended to search TechDoc Hub for potential fixes, workarounds, or known issues.

  To access the TechDoc Hub, log on to Genetec Portal and click TechDoc Hub. Can't find what you're looking for? Contact documentation@genetec.com.
- **Genetec Technical Assistance Center (GTAC):** Contacting GTAC is described in the Genetec Advantage Description.

Technical training

In a professional classroom environment or from the convenience of your own office, our qualified trainers can guide you through system design, installation, operation, and troubleshooting. Technical training services are offered for all products and for customers with a varied level of technical experience, and can be customized to meet your specific needs and objectives. For more information, go to http://www.genetec.com/support/training/training-calendar.

Licensing

- For license activations or resets, contact GTAC at https://portal.genetec.com/support.
- For issues with license content or part numbers, or concerns about an order, contact Genetec Customer Service at customerservice@genetec.com, or call 1-866-684-8006 (option #3).
- If you require a demo license or have questions regarding pricing, contact Genetec Sales at sales@genetec.com, or call 1-866-684-8006 (option #2).

Hardware product issues and defects

Contact GTAC at https://portal.genetec.com/support to address any issue regarding Genetec appliances or any hardware purchased through Genetec Inc.

Glossary

access control (physical access)

Access control (physical access) is the management of access to physical assets such as doors and group of doors.

access requests report

In Genetec ClearID™, an access requests report is a list of access requests for a specific site. The report includes information about the access request date, area requested, status, requested by, requested for, and period of access.

access request workflow

An access request workflow is a series of activities performed by the system or authorized people during the life cycle of an access request. The activities can change the state and properties of access requests, affect other entities in the system, or wait for a condition to be met.

access reviews report

In Genetec ClearID™, an access reviews report is a list of access reviews. The report includes information about area, role, or identity access reviews and the current review status (not started, started, in progress, completed, or expired).

access rule

An access rule entity defines a list of cardholders who are granted or denied access based on a schedule. Access rules apply to secured areas and doors for entry and exit, or to intrusion detection areas for arming and disarming.

antipassback

Antipassback is an access restriction placed on a secured area that prevents a cardholder from entering an area that they have not yet exited from, and vice versa.

area

In Security Center, an area entity represents a concept or a physical location (room, floor, building, site, and so on) used for grouping other entities in the system.

area

In Genetec ClearID™, an area is a logical entity that defines the relationship between Synergis™ doors and area owners. Areas are managed by the area owner.

area manager

In Genetec ClearID™, an area manager is an identity with approval authority over an area. The manager can give or remove access and approve or deny access requests for an area. They are also responsible for approving area access reviews.

area owner

In Genetec ClearID™, an area owner is an identity with authority over an area. The owner can define the policy for an area, assign area managers, give or remove access, and approve or deny access requests for an area.

attributes

In Genetec ClearID™, attributes are the traits or characteristics that make up an identity. Examples of attributes include department, location, role, seniority, pay grade, training certifications, and security clearance.

cardholder

A cardholder entity represents a person who can enter and exit secured areas by virtue of their credentials (typically access cards) and whose activities can be tracked.

Cardholder access rights

The *Cardholder access rights* task is a maintenance task that reports on which cardholders and cardholder groups are granted or denied access to selected areas, doors, and elevators.

cardholder group

A cardholder group is an entity that defines the common access rights of a group of cardholders.

credential

A credential entity represents a proximity card, a biometrics template, or a PIN required to gain access to a secured area. A credential can only be assigned to one cardholder at a time.

custom field

A custom field is a user-defined property associated with an entity type. Custom fields are useful for storing additional information.

delegation

In Genetec ClearID™, delegation is the process of transferring Genetec ClearID™ tasks within your organization, for example, due to a vacation or sabbatical. Tasks may be transferred among site owners, area owners, area managers, role owners, role managers, supervisors, and visit event approvers.

direct reports

In Genetec ClearID™, direct reports are employees (identities) that report to a supervisor.

direct reports report

In Genetec ClearID™, a direct reports report is a list of identities of employees that report to a supervisor. The report includes information about direct reports, delegated direct reports, job titles, companies, and access control status.

Genetec ClearID™

Genetec ClearID™ is a smarter way to manage physical access using a self-service solution for Synergis™.

Genetec ClearID™ API

The Genetec ClearID™ API is an Application Programming Interface that developers can use to help customers and partners integrate additional software or perform custom functions.

Genetec ClearID™ LDAP Synchronization Agent

The Genetec ClearID™ LDAP Synchronization Agent is a Windows application that is used to synchronize Active Directory (AD) Lightweight Directory Access Protocol (LDAP) attributes into Genetec ClearID™ identity attributes.

Genetec ClearID™ One Identity Synchronization Tool

The Genetec ClearID™ One Identity Synchronization Tool is a Windows service that you can use to import identities information from an external system into Genetec ClearID™.

Genetec ClearID™ Self-Service Kiosk

Genetec ClearID™ Self-Service Kiosk is a mobile app that simplifies the management of visitors enrolled using the Genetec ClearID™ self-service portal. The self-service kiosk is intended for visitor centers or gated facilities where guests check-in by themselves.

Global Cardholder Synchronizer

The Global Cardholder Synchronizer (GCS) role ensures the two-way synchronization of shared cardholders and their related entities between the local system (sharing guest) where it resides and the central system (sharing host).

global watchlist

In Genetec ClearID™, a global watchlist is a watchlist that is enforced across all sites in your system.

identity

In Genetec ClearID™, an identity represents a person and defines what they can do across various platforms, security systems, business systems, and functions. Each identity has one or more access control badges (credentials) and is linked to a cardholder in Synergis™. For example, these credentials could be a Windows user (Active Directory), an employee (Human Resources and Payroll), a sales person (CRM and Quoting Tool), and a cardholder (Physical Security).

identity certificate

An identity certificate is a *digital certificate* used to authenticate one party to another in a secure communication over a public network. Identity certificates are generally issued by an authority that is trusted by both parties, called a *certificate authority (CA)*.

identity requests report

In Genetec ClearID™, an identity requests report is a list of identity requests for your ClearID account. The report includes information about the identity request date, requester, name, identity template, status, and reviewers.

identity request workflow

An identity request workflow is a series of activities performed by the system or authorized people during the life cycle of an identity request. The activities can create an individual identity, or multiple identities using a CSV import, and add each new identity to a role to inherit relevant access for a specified period.

People counting

The *People counting* task is an operation task that keeps count in real-time of the number of cardholders in all secured areas of your system.

provisioning rule

In Genetec ClearID™, a provisioning rule is a logic-based criterion used to grant or revoke access by adding identities to or removing identities from a specific role or area.

proxy authentication

Proxy authentication is the process of validating user credentials for access to a proxy server. This authentication typically includes a username and can also include a password.

proxy server

A proxy server is a server that verifies and forwards incoming client requests to other servers for further communication. For example, when a client is unable to meet the security authentication requirements of the server but should be permitted access to some services.

role

In Genetec ClearID™, a role is a group of people who are assigned the same access. A person can be assigned multiple roles. Roles are linked to cardholder groups in Synergis™. A role manager controls who is granted access to the group.

role activity report

In Genetec ClearID™, a role activity report is an audit trail of all activities related to roles. The report includes timestamp information, activity type, who activity was performed by, and a details section including reason information.

role manager

In Genetec ClearID™, a role manager is an identity that has authority over who is assigned to a role. A role manager can add people to and remove people from a role. They are also responsible for role access review approvals.

role owner

In Genetec ClearID™, a role owner is responsible for assigning role managers and configuring role-based policies.

schedule

A schedule is an entity that defines a set of time constraints that can be applied to a multitude of situations in the system. Each time constraint is defined by a date coverage (daily, weekly, ordinal, or specific) and a time coverage (all day, fixed range, daytime, and nighttime).

Security Center

Security Center is a truly unified platform that blends IP video surveillance, access control, automatic license plate recognition, intrusion detection, and communications within one intuitive and modular solution. By taking advantage of a unified approach to security, your organization becomes more efficient, makes better decisions, and responds to situations and threats with greater confidence.

site

In Genetec ClearID™, a site is a logical entity. Sites include one or more areas. Each site and area can have a different owner.

site activity report

In Genetec ClearID™, a site activity report is an audit trail of activities or events for a specific site. The report includes timestamp information, activity type, area, who activity was performed by, and a details section including reason information.

site and area owners report

In Genetec ClearID™, a site and area owners report is a list that provides a global view of the following identities and their permissions: site owner, area manager, area owner, and watchlist manager. The report includes site, area, identity, identity permission, delegated from, identity status, and web portal access information.

site owner

In Genetec ClearID™, a site owner is an identity that has authority over areas associated with a specific site. The site owner can assign or modify area owners and can configure specific area settings that are exclusive to site owners. They are also responsible for site access reviews.

subscription

In Genetec ClearID™, a subscription is a renewable license that assigns a set of privileges to a Genetec ClearID™ account for a defined period. It includes logging on to the portal, configuring several Security Center workstations and users, and using a set of features, as defined by the subscription license.

Synergis™

Security Center Synergis™ is the IP access control system (ACS) that heightens your organization's physical security and increases your readiness to respond to threats. Synergis™ supports an ever-growing portfolio of third-party door control hardware and electronic locks. Using Synergis™, you can leverage your existing investment in network and security equipment.

Synergis™ Cloud Link

The Synergis™ Cloud Link is an intelligent, PoE-enabled access control appliance that supports various third-party interface modules over IP and RS-485.

user activity report

In Genetec ClearID™, a user activity report is an audit trail of all activities related to users. The report includes timestamp information, activity type, who activity was performed by, and a details section including reason information.

visitor escort rule

The visitor escort rule is the additional access restriction placed on a secured area that requires visitors to be escorted by a cardholder during their stay. Visitors who have a host are not granted access through access points until both they and their assigned host (cardholder) present their credentials within a certain delay.

Visitor management

The *Visitor management* task is the operation task that you can use to check in, check out, and modify visitors, as well as manage their credentials, including temporary replacement cards.

visitors report

In Genetec ClearID™, a visitors report is a list of current or upcoming visits, or visits that occurred in the past for a specific site. The report includes information about visitor name, event requester, event name, expected arrival, check-in, check-out, and watchlist status.

visit request workflow

A visit request workflow is a series of activities performed by the system or authorized people during the life cycle of a visit request. The activities can change the state and properties of visit requests, affect other entities in the system, or wait for conditions to be met.

watchlist

In Genetec ClearID™, watchlists are used to screen visitors at an individual or company level. You can configure the watchlist to perform allow, block, or notify actions at a site or global level.

watchlist manager

In Genetec ClearID™, a watchlist manager is an identity that is responsible for watchlists. A watchlist manager can create or modify watchlists and add individuals or companies to a watchlist. They are also responsible for configuring watchlists as a site-specific watchlist or a global watchlist.

watchlist workflow

A watchlist workflow is a series of activities performed by the system or authorized people during the life cycle of a visit request if watchlists are enabled. The activities can change the state and properties of watchlists, affect other entities in the system, or wait for conditions to be met.

workflow

In Genetec ClearID™, a workflow is a process used to initiate a request that requires multiple steps, including the authorization of different stakeholders. For example, access requests or site visit requests.