User's Guide-English

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Edge Solo User's Guide

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Getting Started

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Edge Solo is a cost-effective, single-door access control solution. This solution permits remote management and report generation using a web browser.

Edge Solo lets you set up and control access to your door. You set up the people who need regular access to the door and assign them a card and schedule.You can also let someone in, unlock the door, relock the door, and monitor all door activity.

The following sections describe how to get started with your Edge Solo:

About This Guide

This guide describes how to use the Edge Solo to manage people, cards, and schedules.

Conventions

This guide uses the following typographical conventions to help explain how to use the Edge Solo.

Convention	Definition
Bold	Words in **bold** show items to select or click, such as menu items, tabs, or buttons.
Note	Notes contain important information that may affect how you set up Edge Solo.

Installing the Edge Solo Jumpstart Shortcut

Before you can access the Edge Solo management console to set up schedules, people, and cards, Windows users need to install the Edge Solo Jumpstart shortcut. This shortcut lets you access the Edge Solo management console using your local area network.

Note: To install the Jumpstart shortcut, you need the Media Access Control (MAC) address of your Edge Solo. Your installer put the MAC address on the *Edge Solo Quick Start* card, or it is on the Edge Solo box. The MAC address is a unique number that identifies your Edge Solo.

If you are using Linux or a Mac, you need to use a static IP address.

To download and install the Jumpstart shortcut:

1. Open your web browser.
2. In the field at the top of the browser window, enter the following:
   www.hidcorp.com/SoloJumpstart.exe
3. Press **Enter**.
4. Use the run or open option to start the installation.
   - If run or open is not an option, save the file to a folder. Using My Computer on your Windows Desktop, navigate to where you downloaded the file and double-click the **SoloJumpstart.exe** file.
   - The Welcome window displays.
5. Click **Next**.
6. Enter the 12-character MAC address of your Edge Solo.
   - Enter just the letters and numbers without any colons or other characters.
7. Click **Next**.
8. Select the shortcuts that will let you access Jumpstart.
   - Be sure you know where you put the shortcuts.

9 Click **Next**.

- Jumpstart installs and displays the successful installation window when it is finished.

10 Click **Finish**.

- Now you can use the Jumpstart shortcut to access the Edge Solo management console.

Accessing the Edge Solo Management Console

The Edge Solo management console is where you set up and monitor your Edge Solo. You access the management console using your web browser. Edge Solo supports the following browsers:

- Microsoft Internet Explorer, version 6.0 or later
- Mozilla Firefox, version 2.0 or later

Note: You must enable JavaScript in your browser. If it is not enabled, you will not be able to display the Edge Solo management console. For information about how to enable JavaScript, see "Enabling JavaScript in Your Browser" on page 4.

You must log in with the user name and password to access the management console. The Edge Solo has a single user name and password for anyone who needs to manage your system. The user name is: user. Be sure to enter it with the lower-case letter u.

The person who installed your Edge Solo set your password. If you do not have the password, contact your installer.

More than one person can be logged in at a time.

To access the management console:

1 Using the shortcut you created when you installed Edge Solo Jumpstart, start Jumpstart.

- The shortcut may be in one or more of the following locations:
  - Start menu
  - Windows Desktop
  - Quick Launch bar

    - Internet Explorer Favorites

  - Jumpstart opens your default browser and accesses your Edge Solo, then the Login page displays.

2. In the User Name field, enter your user name.
    - The user name is **user** and is case sensitive.
3. In the Password field, enter your password.
    - Enter the password exactly the way the installer gave it to you. Passwords are case sensitive and contain only letters and numbers. Refer to the *Edge Solo Quick Start for Customers* card that your installer gave you.
4. Click **OK**.
    - The Edge Solo management console page displays. The Home tab automatically displays whenever you log in.
    - For information about the management console page, see "Understanding the Management Console Page" on page 5.

Enabling JavaScript in Your Browser

If the management console page does not display properly, check that you have JavaScript enabled in your browser. The exact location of this option may vary based on the browser version you are using, but the steps below should help you find and enable the option.

To enable JavaScript in Internet Explorer:

1. Select **Tools > Internet Options**.
2. Click the **Security** tab.
3. Click **Custom Level**.
4. Scroll down to the Scripting options.
5. Enable Active Scripting.
6. Click **OK**.
7. Click **OK**.

To enable JavaScript in Firefox:

1. Select **Tools > Options**.
2. Click the **Content** icon.
3. Select the Enable JavaScript option.
4. Click **OK**.

Understanding the Management Console Page

The management console page gives you access to the things you can do to set up your Edge Solo.

Click to unlock the door; door stays unlocked until you relock it.

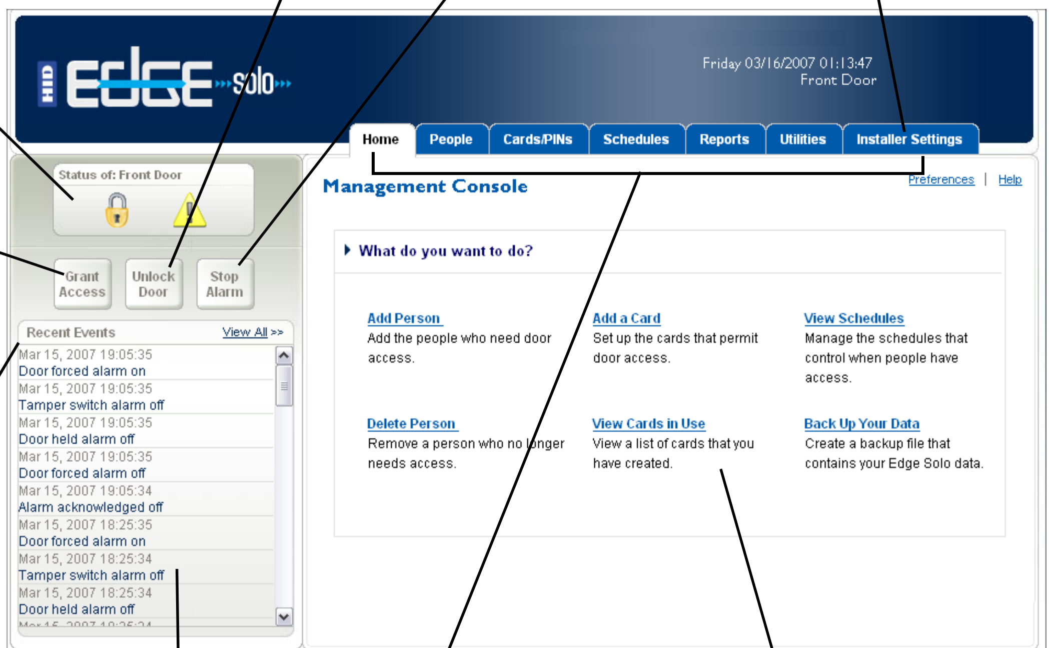
Click to stop an alarm that is currently sounding or flashing.

Tab contains advanced settings for installers. If you have access, be sure you understand the settings before changing them.

Status area where you can see the current door status.

Click to let someone in the door now.

Dashboard that displays on the left side of every page.



Log of all recent events related to door access, alarms, and access attempts.

Tabs where you can view lists of information and add, edit, or delete information.

Shortcuts to common tasks in the management console.

Logging Off

When you are finished working with the Edge Solo, you should close your browser. This logs you off.

You may want to stay logged in all day if you need to let people in the door or want to monitor events. We recommend that you close your browser at the end of the day.

To log off:

- Close your browser.

Technical Support

Technical support for your Edge Solo is available by telephone:

- North Americas—California, USA
  - Telephone—(949) 598-1600
  - Toll Free Number—(800) 237-7769
  - Fax—(949) 598-1690
- South America—Mexico
  - Telephone—+52 477 779 1492
  - Fax—+52 477 779 1493
- Europe, Middle East, and Africa—Haverhill, England
  - Telephone—+44 1440 714 850
  - Fax—+44 1440 714 840
- Asia Pacific—Hong Kong
  - Telephone—(852) 3160 9800
  - Fax—(852) 3160 4809

Setting Up Preferences

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You can set up the following:

- Password to access the management console
- Custom fields for setting up people
- Display formats for names, dates, and times
- Date and Time settings

Changing Your Password

You use a single password to manage your Edge Solo. More than one person can be logged in at a time with the password.

To change your password:

1. Click the **Preferences** text link.
   - The Preferences page displays.
2. Click the **Password** text link.
   - The Password page displays.
3. Enter the new password in both fields.
   - The new password must be at least 6 characters long, but not more than 10 characters. Use only letters and numbers. We recommend making the password difficult to guess by mixing numbers, lower case letters, and upper case letters and not spelling an actual word.
4. Click **Save**.

Defining How Information is Displayed

You can define the way names, dates, and times are displayed within the Edge Solo Management Console. You can also define two custom fields for storing information about people. By default, these fields are called Custom 1 and Custom 2.

Use one or both of these fields for a department name or number, supervisor's name, or other information that you want to maintain for people who use this door.

If you do not want to use these fields, enter a few blank spaces in them.

To define the displays:

1. Click the **Preferences** text link.
   - The Preferences page displays.
2. Click the **Displays** text link.
   - The Displays page displays.
3. Use the list boxes to select the desired formats for names, date, and times.
4. In the first custom field, select the "Custom Heading 1" text and enter what you want to call the field.
   - You can enter up to 25 characters.
   - If you do not want to use the field, enter a few blank spaces in the field.
5. If you want to define the second custom field, select the “Custom Heading 2” text and enter what you want to call the field.
   - You can enter up to 25 characters.
   - If you do not want to use the field, enter a few blank spaces in the field.
6. Click **Save**.
   - Names, dates, times, and headings for the custom fields will now display when you view, enter or edit information.

Changing the Date and Time

You can change the following related to the time that the Edge Solo uses for events, reports, and at the top of each management console page:

- Current date
- Current time

To change the date and time:

1. Click the **Preferences** text link.
   - The Preferences page displays.
2. Click the **Date and Time** text link.
   - The Date and Time page displays.
3. Set the current date and time, if needed.
4. Click **Save**.
   - All time displays change to use the new settings. All events that occur after the change will use the new settings. If you changed the time zone, only new event times will reflect the new time zone.

3 Setting Up Schedules

Before anyone can use a card to access the door, you must set up at least one schedule and assign a schedule to each person.

The Edge Solo comes with the following schedules already set up for your use:

- 24x7—Sunday through Saturday, 00:00 to 24:00.
- 8:00–17:00—Monday through Friday 08:00 to 17:00.
- 7:00–19:00—Monday through Friday 07:00 to 19:00, Saturday 08:00 to 12:00.
- 15:00–24:00—Monday through Friday 15:00 to 24:00, Saturday 15:00 to 19:00.
- 23:00–8:00—Sunday through Thursday 23:00 to 24:00, Monday through Friday 00:00 to 08:00, Friday 23:00 to 24:00, Saturday 00:00 to 03:00.

You can use these schedules as they are or edit them to meet your needs. You can also create your own schedules.

If needed, you can also set a door unlock schedule. This is a special type of schedule that automatically unlocks the door at a specific time and relocks the door at a specific time.

The following sections describe how to set up schedules:

- "Adding a Schedule" on page 10
- "Changing a Schedule" on page 14
- "Assigning a Schedule to a Person" on page 14
- "Viewing a List of All Schedules" on page 15
- "Deleting a Schedule" on page 15
- "Downloading Schedules for Use in a Spreadsheet" on page 16
- "Setting Up and Editing the Door Unlock Schedule" on page 16

Adding a Schedule

Before anyone can use a card to open the door, you must set up at least one schedule and assign a schedule to each person.

A schedule controls the time of day people can access the door. You can have up to eight schedules to accommodate different work hours.

When setting the times, take into account people who arrive before their normal workday starts. For example, if people work from 8 a.m. to 5 p.m., people may begin arriving at 7:45 a.m., or possibly earlier.

You can add holidays and other special days to any schedule. The holidays and special days let you determine whether people using a schedule have access on those special days.

To add a schedule:

1. Click the **Schedules** tab.
   - The Schedules tab displays, with a list of the existing schedules.
2. Click **Add Schedule**.
   - The Add Schedule page displays.
3. In the Schedule Name field, enter a name for this schedule.
   - You can enter up to 25 characters, including spaces.
   - Give the schedule a name that you will easily recognize when you need to assign a schedule.
4. If you need to set up each weekday with different times, click the **Change to show each weekday separately** text link to add a row for each weekday, then set the time for each day.
5. In the Monday - Friday row or in the row for each day, set the time that people assigned to this schedule will have access, in the Time 1 column.
   - If one of the autofill options meets your needs, select that option. The times on the right will automatically populate.
   - If you need to set up a split schedule, enter the split times in the Time 1 and Time 2 columns. You might need a split schedule if people need access to the door from 8 a.m. to noon, no access from 12:01 p.m. to 1:00 p.m., then need access again from 1:01 p.m. until 5:00 p.m. For more information, see "Example Schedule 1: Shift That Has Split Times" on page 11.
   - If you require more than two time blocks for Monday - Friday, click **Add Time 3** to add a new column.

6 Set the access times for the Saturday and Sunday rows.

7 If you want holidays or other special days to have different access times or no access, click **Add Row for Special Day**.

- For more information, see "Adding Dates That Are Exceptions (Holidays or Special Days)" on page 12.

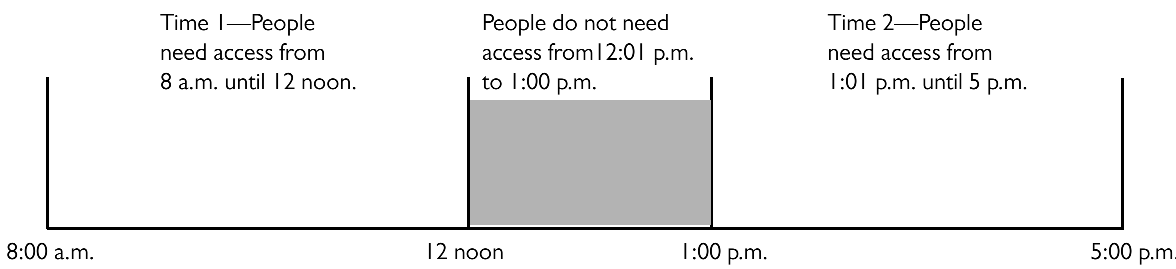
8 Click **Save**.

- You can now assign this schedule to a person.

Example Schedule 1: Shift That Has Split Times

A schedule with split times would accommodate a situation where people need access to the door during certain times, but not other times in any given day. For example, if people need access from 8 a.m. to noon, do not need access from 12:01 p.m. to 1:00 p.m., then need access again from 1:01 p.m.until 5:00 p.m.

The timeline below shows a split shift example.



To create a schedule for the split shift above, you would set the times in the schedule as follows:

Days	Time 1	Time 2
Monday through Friday	8:00 to 12:00	13:01 to 17:00

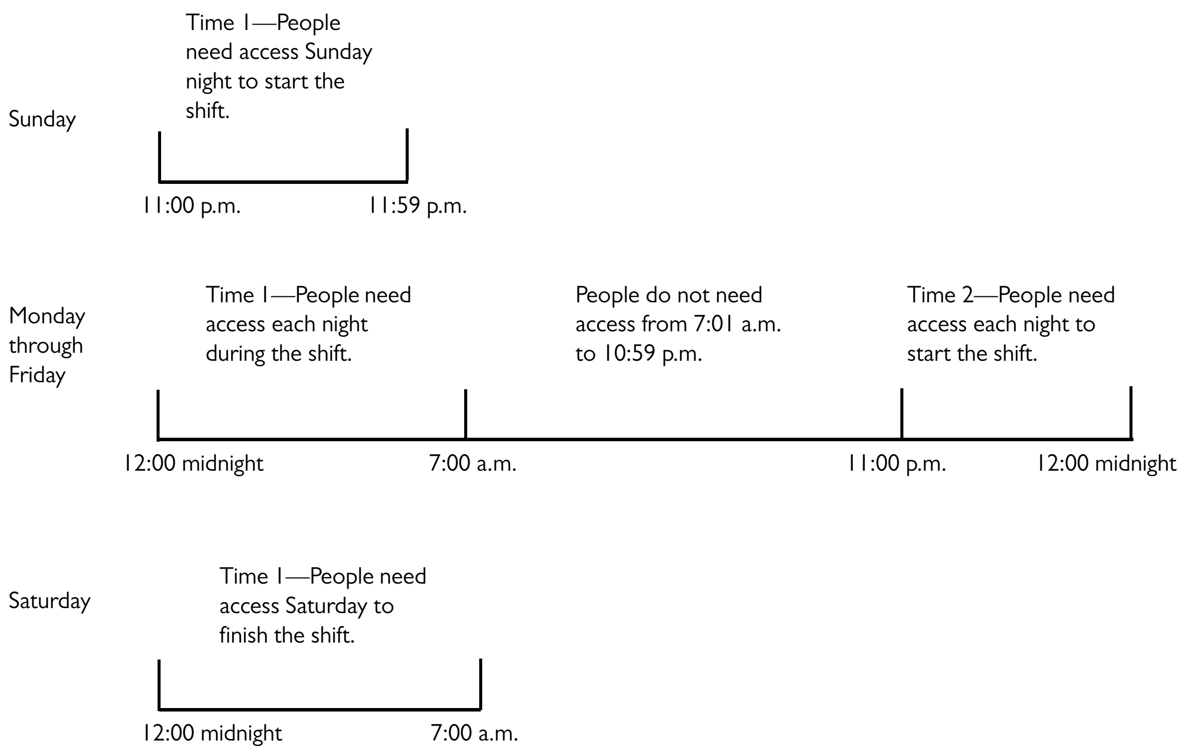
Note: People using the schedule above will not be able to enter the door between 12:01 p.m. and 1:00 p.m. Be sure that this is what you intend.

If you need another time block, you can click **Add Time 3** to add a third column to the schedule.

Example Schedule 2: Shift That Spans Midnight

A schedule that spans midnight would accommodate shifts that start one day and end the next, for example, a third shift that starts at 11 p.m. and ends at 7 a.m.

The timelines below show an example of a schedule that spans midnight.



To create a schedule for the shift above, you would set the times in the schedule as follows:

Days	Time 1	Time 2
Sunday	23:00 to 23:59	
Monday through Friday	00:00 to 7:00	23:00 to 23:59
Saturday	00:00 to 7:00	

Adding Dates That Are Exceptions (Holidays or Special Days)

When you set up a schedule, you should consider whether you need to have different access settings for holidays or other special days throughout the year. For example, if your company observes U.S. holidays, consider whether to permit access on those days.

If you want to permit access on holidays and special days, the same as you permit access any other time, you do not need to do anything. However, if you want to limit access on holidays and special days, you need to add a row to your schedule for each special day.

To add dates that are exceptions:

1. From the schedule you are adding or editing, click **Add Row for Special Day.**
    - A new row displays at the bottom of the schedule.

2 In the new row, click the **Change Date** text link.

- The Add Special Day window displays.

3 Select the date you want one of the following ways:

- If you have already added a special day, select the day you want from the Select a Special Day drop-down list.
- In the text box, click to use the pop-up calendar to select the date you want.

4 Select whether you want this special day to repeat in future years.

- Add this date every year—Use if this special day occurs on the same date every year, and you want it in this schedule every year.
- Add this date just this calendar year—Use if this is a one-time event or a special day that does not occur on the same date each year.

5 In the Name field, enter a name for this special day.

- You can enter up to 20 characters, including spaces.
- Give the special day a name that clearly identifies it. If you do not enter a name, the date will display in the schedule.

6 Click **Save**.

- The schedule you started from displays.

7 In the Time 1 column, set the time that people assigned to this schedule will have access on this special day.

- If you do not want people to have access on this special day, use the “No access” option in the autofill area.
- If you need to set up a split schedule, enter the split times in the Time 1 and Time 2 columns. You might need a split schedule if people need access to the door from 8 a.m. to noon, no access from 12:01 p.m. to 1:00 p.m., then need access again from 1:01 p.m. until 5:00 p.m. For more information, see “Example Schedule 1: Shift That Has Split Times” on page 11.
- If you require more than two time blocks for the special day, click **Add Time 3** to add a new column.

8 If you need additional holidays or special days, repeat steps 1 through 7 for each special day.

9 Click **Save**.

- Changes to the schedule take effect immediately.

Changing a Schedule

You can change a schedule any time you need to adjust the access times, add or remove a holiday, or make any other adjustments. You should review your schedules at least once a year to check that they are correct and reflect holidays for the next twelve months.

Note: Changing a schedule affects all people the schedule is assigned to.

To change a schedule:

1. Click the Schedules tab.
   - The Schedules tab displays, with a list of the existing schedules.
2. Click the schedule you want to change.
   - A pop-up menu displays.
3. Select **Edit**.
   - The Edit Schedule page displays, with the schedule you selected.
4. Make the changes you need.
   - For more information, see "Adding Dates That Are Exceptions (Holidays or Special Days)" on page 12, "Example Schedule 1: Shift That Has Split Times" on page 11, and "Example Schedule 2: Shift That Spans Midnight" on page 11.
5. Click **Save**.
   - Changes to the schedule take effect immediately.

Assigning a Schedule to a Person

After you set up a schedule, you can assign it to a person and assign a card to the person. You can start by either setting up the card or the person. For more information see "Assigning or Changing a Person's Schedule" on page 23.

Viewing a List of All Schedules

You can view a list of all schedules by clicking the **Schedules** tab. The following sections describe what you can do from the schedule list:

- "Adding a Schedule" on page 10
- "Changing a Schedule" on page 14
- "Deleting a Schedule" on page 15
- "Setting Up and Editing the Door Unlock Schedule" on page 16

Deleting a Schedule

You can delete a schedule if you no longer need it.

Note: You cannot delete a schedule that is assigned to one or more people. You must first assign each person to a different schedule, then delete the schedule.

To delete a schedule:

1. Click the **Schedules** tab.
   - The Schedules tab displays, with a list of the existing schedules.
2. Click the schedule you want to delete.
   - A pop-up menu displays.
3. Select **Delete**.
   - The Confirm window displays.
4. Click **Delete**.
   - People assigned to this schedule will no longer have access until you assign a new schedule to them.

Downloading Schedules for Use in a Spreadsheet

You can download schedule information and import that information into a spreadsheet. For more information, see “Downloading Reports” on page 37.

Setting Up and Editing the Door Unlock Schedule

If needed, you can set up a separate schedule to automatically unlock the door. When the door is unlocked using this method, anyone can come in during the unlocked times.

If you do not want your door to unlock automatically, you do not need to set up the door unlock schedule.

Note: Be careful when using the door unlock schedule. The door will unlock according to this schedule, even if your workplace is closed due to weather or other unforeseen circumstances.

To set up the door unlock schedule:

1 Click the **Schedules** tab.

- The Schedules tab displays, with a list of existing schedules.

2 Click the **Door Unlock Schedule** text link.

- The Door Unlock Schedule page displays.

3 In the Schedule Name field, enter a name for this schedule.

- You can enter up to 25 characters, including spaces.
- Give the schedule a name that clearly shows it is the door unlock schedule.

4 In the row for each day, set the time that the door will automatically unlock, in the Time 1 column.

- If one of the autofill options meets your needs, select that option. The times on the right will automatically populate.
- If you need to set up Monday through Friday with the same times, click the **Collapse Monday - Friday** text link to add a single row for Monday through Friday.

- If you need to set up a split schedule, enter the split times in the Time 1 and Time 2 columns. You might need a split schedule to unlock the door from 8 a.m. to noon, lock it from 12:01 p.m. to 1:00 p.m., then unlock again from 1:01 p.m. until 5:00 p.m. For more information, see "Example Schedule 1: Shift That Has Split Times" on page 11.
- If you require more than two time blocks for Monday - Friday, click **Add Time 3** to add a new column.

5 Set the unlock times for the Saturday and Sunday rows.

6 If you want holidays or other special days to use different unlock times, click **Add Row for Special Day**.

- For more information, see "Adding Dates That Are Exceptions (Holidays or Special Days)" on page 12.

7 Click **Save**.

- The door will now unlock and relock automatically based on this schedule.

Setting Up People Who Access the Door

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You can set up people who need to access the door any time, even if you are not ready to assign them a card or schedule yet. However, for people to actually access the door, they do need a card and schedule assigned to them.

The following sections describe how to set up people:

- "Adding People" on page 19
- "Changing a Person's Information" on page 21
- "Assigning or Changing a Person's Card" on page 22
- "Assigning or Changing a Person's Schedule" on page 23
- "Viewing a List of All People" on page 24
- "Removing People" on page 25
- "Downloading People Information for Use in a Spreadsheet" on page 25

Adding People

You must add each person who needs to access the door and assign the person a card and schedule. Each person can have one or more cards and one or more schedules.

You can assign the schedule and card when you add a person, as described below. For more information about schedules, see "Adding a Schedule" on page 10.

To add a person:

1. Click the **People** tab.
   - The People tab displays, with the fields to add a person.
2. In the First Name, Middle Initial, and Last Name fields, enter the person's name.
   - You can enter up to 20 characters in each field. These fields are required.

3. Enter information into the additional fields, if needed.
   - You can enter up to the following number of characters in each field:
     - Middle Initial—1
     - Email Address—30 (in the format name@company.com)
     - Phone Number—20 (use any format you want)
     - Custom fields—25
   - The additional fields are informational and are not required. The two fields below the Last Name field are custom fields that you can set up to record information you want, such as department or supervisor. For information about setting up these custom fields, see "Defining How Information is Displayed" on page 7.
4. Select the Needs Extra Time option for this person:
   - Yes—This person needs more time to open the door, perhaps because the person uses a wheelchair or crutches. Your installer set the extra time that controls how long the door will stay unlocked.
   - No—This person does not need more time to open the door. Your installer set the standard time that controls how long the door will stay unlocked.
5. From the "Do you want to assign a card now?" drop-down list, select the option you want:
   - Yes, assign card—Select if you have a card for this person and you are ready to assign the card to this person now. Additional fields display below to assign the card. Continue with the steps below.
   - Not at this time—Select if you do not want to assign the card now. The system saves the information, and you can continue with step 8. For information about assigning a card later, see "Assigning or Changing a Person's Card" on page 22.
6. From the Existing Card drop-down list, select the option you want:
   - Choose Existing Card—Select if you have already added cards, and you have one or more cards that are not yet assigned to a person.
   - New Card—Select if you need to add a card now.
     - You must have the correct card format already set up.
     - If you do not have a card format that corresponds to the card you want to assign, you need to set up the card format. For more information, see "Setting Up Card Formats" on page 27.

7 Assign the card by following the steps below based on your selection.

If you selected Choose Existing Card	If you selected New Card
• A list of unassigned cards displays. 1 Click the card you want to assign to this person. 2 Select the expiration option for this card: • No—This card will not expire. • Yes, expires on—This card will expire and no longer work after midnight on the date selected. Select the expiration date you want. 3 Click **Save**. 4 Continue with the steps below.	• Additional fields display to add a new card. 1 From the Assign a Format drop-down list, select the card format that corresponds to the card you want to assign. 2 In the Card Number field, enter the number of the card you want to assign. 3 Select the expiration option for this card: • No—This card will not expire. • Yes, expires on—This card will expire and no longer work after midnight on the date selected. Select the expiration date you want. 4 Click **Save**. 5 Continue with the steps below.

8 From the “Do you want to add a schedule now?” drop-down list, select the option you want:

- Choose Existing Schedule—Select if you have already set up a schedule, and you want to assign it now, then click the schedule you want to assign to this person. The system saves the information, and you are done.
- Not at this time—Select if you do not want to assign a schedule to this card now. The system saves the information, and you are done. For information about assigning a schedule, see “Assigning or Changing a Person’s Schedule” on page 23.

Changing a Person’s Information

After you add a person, you can change the person’s information, as needed.

To change a person’s information:

1 Click the **People** tab.

- The People tab displays, with the fields to add a person.

2 Click the **View List** text link.
   - A list of the people you have set up displays.
3 Click the person whose information you want to change.
   - A pop-up menu displays.
4 Select **View**.
   - The Edit Person page displays, with the person's information.
5 Click **Edit**.
6 Edit the person's information as needed.
7 Click **Save**.
   - If you need to delete, edit, or assign an additional card, click the appropriate button.
   - If you need to change, remove, or assign an additional schedule, click the appropriate button.

Assigning or Changing a Person's Card

For a person already in the system, you can do the following related to cards:

- Assign a card for the first time
- Assign a different card
- Assign an additional card

To assign or change a person's card:

1 Click the **People** tab.
   - The People tab displays, with the fields to add a person.
2 Click the **View List** text link.
   - A list of the people you have set up displays.

3 Click the person whose information you want to change.

- A pop-up menu displays.

4 Select **View**.

5 Edit the card information, as needed.

- Once a card is created, only the expiration date can be changed.

Assigning or Changing a Person's Schedule

For a person already in the system, you can do the following related to schedules:

- Assign a schedule for the first time (see the steps below)
- Assign a different schedule (see the steps below)
- Assign an additional schedule (see "Assigning Multiple Schedules to a Person" on page 24)

To assign or change a person's schedule:

1 Click the **People** tab.

- The People tab displays, with the fields to add a person.

2 Click the **View List** text link.

- A list of the people you have set up displays.

3 Click the person whose information you want to change.

- A pop-up menu displays.

4 Select **View**.

- The Edit Person page displays.

5 In the Schedule Name area, do one of the following, depending on what you need to do.

- To remove the currently assigned schedule, click **Remove Assignment**. This will remove the schedule from the person.
- To assign the person another schedule, click **Assign Additional Schedule**.

Assigning Multiple Schedules to a Person

After you set up the person and assign a schedule, you can assign additional schedules to the person.

To assign multiple schedules to a person:

1. Click the **People** tab.
   - The People tab displays.
2. Click the **View List** text link.
   - A list of the people you have set up displays.
3. Click the person whose schedule you want to assign.
   - A pop-up menu displays.
4. Select **View**.
   - The Edit Person page displays.
5. In the Schedule Name area, click **Assign Additional Schedule**.
   - The Choose Schedule window displays with a list of existing schedules.
6. Select the additional schedule that you want to assign.
   - The person will have access based on the settings in any of the assigned schedules. For example, if one assigned schedule permits access on Saturday and another assigned schedule does not, the person *will* have access on Saturday.

Viewing a List of All People

You can view a list of all people you have added to the system.

To view a list of people:

1. Access the management console.
   - For more information, see "Accessing the Edge Solo Management Console" on page 3.
2. Click the **People** tab.
   - The People tab displays, with the fields to add a person.

3 Click the **View List** text link.

- A list of the people you have set up displays. You can view or change any of the information in the list by clicking text in the list and selecting an option from the pop-up menu.

Removing People

If a person leaves the company, moves to a different department, or no longer needs access to the door, you can remove the person from the system.

To remove a person:

1 Click the **People** tab.

- The People tab displays, with the fields to add a person.

2 Click the **View List** text link.

- A list of the people you have set up displays.

3 Click the name of the person you want to remove.

- A pop-up menu displays.

4 Select **Delete**.

- The Confirm window displays.

5 Select the options you want.

6 Click **Confirm**.

Downloading People Information for Use in a Spreadsheet

You can download the people information and import it into a spreadsheet. For more information, see "Downloading Reports" on page 37. The report may take up to an hour to create.

Setting Up Cards

5

You can set up cards for use, even if you are not ready to assign them to a person yet. However, for anyone to actually access the door with a card, you need to assign a card and schedule to a person.

Note: Before you add a card, you must set up the format for your type of cards. For more information, see "Setting Up Card Formats" on page 27.

The following sections describe how to set up cards:

Setting Up Card Formats

Before you add a card, you must set up the format for your type of card. When you set up the format, you assign the format a name, select the correct format template, and enter the code your installer gave you for each type of card.

Each type of card may use a different format to store information on the card. The format your cards use is listed on the box of cards. The Edge Solo accepts the following formats:

- Corporate 1000
- H10301 Standard 26-bit
- H10304 HID Managed 37-bit
- H10302 Open 37-bit

Each type of card has a company ID code or facility code listed on the box. Be sure you have this code.

Most likely, you have only one type of card, but it is possible to have more than one type for use with your Edge Solo.

Note: We recommend writing the name you assign to a box of cards on the box. This way, you will know which cards use the format that you set up.

To set up a card format:

1. Click the **Cards/PINs** tab.
   - The Cards/PINs tab displays.
2. Click the **Card Formats** text link.
   - The Card Formats page displays.
3. Click **Add Format**.
4. From the "Which template do you want to use?" drop-down list, select the format template that corresponds to the box of cards you are setting up.
   - The format the cards use is listed on the box.
5. In the Name Your Custom Format box, enter a name for the format.
   - You can enter up 20 characters, including spaces.
   - Be sure you will be able to associate this name with the box of cards you are setting up. We recommend writing the name on the box of cards and making the name something that relates to the cards like the color or brand.
6. If needed, enter the company ID or facility code for the card type.
   - The appropriate field displays, if needed.
   - This code is listed on the box. Some card types have a company ID, and other types have a facility code.
7. Click **Save**
   - You can now add cards to the system that use this format.

Adding Cards

When you add a card, you can assign the card to a person, or you can assign it later.

You can add cards to the system the following ways:

- Add cards individually—Use to add one or more cards that are not numbered sequentially. See “Adding Cards Individually” on page 29.
- Add by swiping—Use to add one or more cards after swiping them. See “Adding a Card by Swiping It” on page 30.

Adding Cards Individually

You must add each card that people will use to access the door. You can assign a card to only one person, but each person can have one or more cards.

Before you add a card, you must set up the format for your cards. For more information, see “Setting Up Card Formats” on page 27.

Note: Before a person can use a card to access the door, you must set up at least one schedule and assign the schedule to the person. For more information, see “Adding a Schedule” on page 10 and “Assigning or Changing a Person’s Schedule” on page 23.

If you do not know the card format, you can add the card by swiping. For more information, see “Adding a Card by Swiping It” on page 30.

To add a card:

1. Click the **Cards/PINs** tab.
   - The Cards/PINs tab displays.
2. Click the **Add** text link.
   - The Add Card page displays.
3. From the Assign a Format drop-down list, select the card format that corresponds to the type of card you want to assign.
   - You cannot change the card format after you save this card. If you select the wrong format, you must delete the card and add the card again.
   - For more information, see “Setting Up Card Formats” on page 27.

4 In the Card Number field, enter the number of the card you want to add.
   - The card number is on the back of the card. You can use the cross reference list that came in the box of cards to help determine which number is the unique card number.
   - You cannot edit the card number after you save this card. If you find an error in the card number, you must delete the card and add the card again.

5 Select the expiration option for this card:
   - No—This card will not expire.
   - Yes, expires on—This card will expire and no longer work after midnight on the date selected. Select the expiration date you want.

6 Click **Save**.

Adding a Card by Swiping It

You can add one or more cards by swiping them. Using this method, the system automatically captures the card number.

To add a card by swiping it:

1 At the card reader, swipe the card.

2 Access the management console.
   - For more information, see "Accessing the Edge Solo Management Console" on page 3.

3 In the Recent Events list on the left side of the page, click the **Add** text link next to the first message that says: Denied Access-Card Not Found.
   - The event displays a few seconds after you swipe the card.
   - The Add Card page displays, with the card number filled in. The card format should be automatically set to Raw Hexadecimal.

4 If Raw Hexadecimal is not set as the card format, select that option.

5 Select the expiration option for this card:
   - No—This card will not expire.
   - Yes, expires on—This card will expire and no longer work after midnight on the date selected. Select the expiration date you want.

6 Click **Save**.

Reassigning a Card to a Different Person

You can also reassign a card to another person, if the original person no longer needs the card.

To reassign a card to a person:

1. Click the **Cards/PINs** tab.
   - The Cards/PINs tab displays, with a list of the cards you have set up.
2. Click the card you want to reassign.
   - A pop-up menu displays.
3. Select **Edit**.
   - The Edit Card page displays.
4. Click the **Edit** text link next to the person the card is assigned to.
   - Edit Person page displays.
5. In the card area, click **Remove Assignment**.
   - The confirmation window displays asking if you want to remove assignment of this card.
6. Click **Confirm**.
   - The card is no longer assigned and is available for reassignment. The Edit Person page displays.
7. Click the **View List** text link.
   - A list of the people you have set up displays.
8. Click the person you want to assign the card to.
   - A pop-up menu displays.
9. Select **View**.
   - Edit Person page displays.
10. In the card area, click the **Assign an Additional Card** text link.
    - The Choose Card window displays with a list of available cards.
11. Select the card you want to assign.

Viewing a List of All Cards

You can view a list of all the cards you have added to the system.

To view a list of cards:

1. Click the **Cards/PINs** tab.
   - The Cards/PINs list displays.

Deleting Cards

If a card is no longer needed, you can delete the card from the system. You can add the card again if you need to.

If you want to assign the card to another person, see “Reassigning a Card to a Different Person” on page 31.

To delete a card:

1. Click the **Cards/PINs** tab.
   - The Cards/PINs list displays.
2. Click the card you want to delete.
   - A pop-up menu displays.
3. Select **Delete**.
   - The Delete Card confirmation window displays with options.
4. Select the options you want if applicable.
5. Click **Confirm**.

Downloading Card Information for Use in a Spreadsheet

You can download card information and import it into a spreadsheet. For more information, see “Downloading Reports” on page 37. The report may take up to an hour to create.

Opening the Door and Monitoring Status

6

The following sections describe how you can unlock and monitor the door from the Edge Solo management console:

Letting Someone In the Door

If the door is locked and someone needs access, you can "buzz" the person in from the management console. This unlocks the door for a few seconds, based on how your installer set up your Advanced Settings.

To let someone in the door:

1. In the dashboard, click **Grant Access**.

Unlocking and Relocking the Door

If the door is locked and someone needs extra time to enter or needs to make several trips, you can unlock the door from the management console.

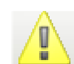
Note: This unlocks the door *until you relock the door*.

To unlock and relock the door:

1. In the dashboard, click **Unlock Door**.
   - The door unlocks and stays unlocked until you relock it. The button changes from **Unlock Door** to **Lock Door**.
2. When you are ready to relock the door, click **Lock Door**.

Stopping a Door Alarm

If you have an alarm device, such as a light, bell, or horn, connected to your system, the alarm device will activate when certain events occur. Your installer set up the events that trigger the alarm device, but they may include someone holding the door open too long or someone forcing the door.

When an event triggers the alarm, the Alarm Status displays the Alarm icon , and the **Stop Alarm** button in the dashboard becomes active, so you can turn off the alarm device.

To stop the door alarm:

1. In the dashboard, click **Stop Alarm**.
   - The alarm device turns off and the Stop Alarm button is no longer available (turns gray). If the alarm was caused by the door being open, the alarm is re-enabled after the door closes.

Monitoring the Door Status

You can monitor the door status in the following ways:

- Status icons in the dashboard
- Recent events in the dashboard
- All events on the Reports tab

Understanding the Status Icons

The status icons in the dashboard on the left side of the management console page, have the following states:

- Door status
    - Locked 
    - Unlocked 
    - Updating status 
- Alarm status
    - No alarm 
    - Alarm 
    - Updating status 

Viewing Recent Events

Events track activities related to the Edge Solo, including when the system denies access, grants access, and detects an attempt to force the door.

The dashboard on the left side of the management console lists the 100 most recent Edge Solo events, with the most recent event first.

To view recent events:

1. In the dashboard, view the recent events.
    - Scroll through the list, as needed.
    - To view all events, click the **View All** text link. For more information, see "Viewing All Events" on page 35.

Viewing All Events

Events track activities related to the Edge Solo, including when the system denies access, grants access, and detects an attempt to force the door.

You can view the last 5,000 events.

To view all events:

1. In the dashboard, click the **View All** text link.
    - The Reports tab displays, with the last 5,000 events available.
2. Click the numbered page links to view additional pages.

Exporting Events for Use in a Spreadsheet

You can download all of the events related to your Edge Solo and import them into a spreadsheet. The system stores the last 5,000 events. For more information, see "Downloading Reports" on page 37. The report may take up to an hour to create.

7 Downloading Reports

You can download the following types of information stored in your Edge Solo:

- People
- Cards
- Events
- List of schedules
- Special days
- All user data (in XML format)

The file you download is formatted as a comma-separated values (CSV) file that you can import into a spreadsheet program like Microsoft Excel. You can then use the spreadsheet to sort the information or print reports.

Note: Reports containing people, cards, events, or user data may take up to an hour to create.

To download reports:

1. Click the **Reports** tab.
   - The Reports tab displays.
2. Click the text link for the report you want.
   - The report is generated.
   - When complete, your browser uses its standard download process.
   - You can now import the file into a spreadsheet program.

Backing Up and Restoring Your Edge Solo Data

8

You should periodically back up your Edge Solo data. You may need to restore data from your backup if you need replace your Edge Solo and when you upgrade to another product.

The following sections describe how to back up and restore your data:

- "Backing Up Your Edge Solo Data" on page 39
- "Restoring Your Edge Solo Data from a Backup" on page 40

Backing Up Your Edge Solo Data

You should periodically back up your Edge Solo data. You may need to restore data from your backup if you need to replace your Edge Solo.

Note: The backup process may take up to an hour to complete.

The backup process stores a file with your data on your computer's or a network hard drive.

To back up your data:

1. Click the **Utilities** tab.
2. Click **Backup Now**.
   - The backup file is generated
   - When complete, your browser uses its standard download process.
3. Save the file as you would other downloaded files.

Restoring Your Edge Solo Data from a Backup

You may need to restore data from your backup if you need to replace your Edge Solo.

Note: The restore process may take up to an hour to complete.

The restore process uses a backup file that you previously created with your Edge Solo data.

Note: You must back up your Edge Solo data before you can restore it. For more information, see "Backing Up Your Edge Solo Data" on page 39.

To restore your data:

1. Click the **Utilities** tab.
2. Click **Browse** to navigate to the backup file on your hard drive or a network drive.
3. Select the backup file and click **Open**.
4. Click **Restore Now**.
    - The management console page will notify you when the process is complete.
    - You must log in again to continue working with the Edge Solo management console.

9 Updating Firmware

Periodically, updates to your Edge Solo firmware may be available. Firmware is the “software” inside the Edge Solo that makes it work.

The email message will include a link to download the file from a web site.

To update your firmware:

1. Click the **Utilities** tab.
2. In the Firmware Update area, click **Browse** to navigate to the update file.
3. Select the update file and click **Open**.
4. Click **Update Now**.
    - The update can take up to seven minutes to complete.
    - The management console page will close.
5. Use the Edge Solo Jumpstart to access the Edge Solo management console and log in again.
    - For more information, see “Accessing the Edge Solo Management Console” on page 3.

Managing Multiple Doors

Edge Solo can be converted to become part of a larger, host-based security system, available through HID development partners. This range of solutions offers both options available for purchase or fully managed solutions available on a monthly fee basis. Benefits of this upgrade include comprehensive management of schedules, people, and cardholders across multiple doors and facilities, as well as comprehensive alarm monitoring, video surveillance, and reporting.

For more information: http://www.hidcorp.com/EdgePartners

Troubleshooting

10

The table below includes common troubleshooting information that may help you resolve a problem before calling your installer.

Symptom	Solution
You cannot contact the Edge Solo device with your browser.	Attempt to reconnect to the device using the Jumpstart shortcut. Check your network connections on your PC and on the Edge Solo device.
The status icons in the Dashboard display question marks, and the event list says “No recent event.”	The card reader is not communicating with the management console software. One of the following is causing the problem: • Someone is updating the card reader’s firmware or restoring data. Wait until the process is complete, then log back in. • Your local area network is not working properly. Contact your network administrator. • Someone else is logged in and is actively working with people, card, or schedule information. Wait until that person finishes.
Someone is attempting to access the door outside the scheduled times.	Determine if that person has a legitimate need to access the door at different times. If yes, assign a different schedule or edit the existing schedule. For more information, see “Assigning or Changing a Person’s Schedule” on page 23. If no, let the person know the hours that are appropriate to access the door.
You do not know the format of a card you want to add.	Swipe the card to add it. For more information, see “Adding a Card by Swiping It” on page 30.
You see an error that says after adding a card: Activity saveCredential: This card/PIN already exists. Please check the data and try again. NOTE: You cannot add the same card by both swiping and entering the card number. Cards added using a format could be a duplicate of a card added as “Raw Hexadecimal.” Error: 19 SO_CONSTRAINT; Source: Data Storage	The card already exists in the system. You cannot add the same card more than once. If you were entering the card number, try again to make sure you entered the number correctly. If you receive the same error, the card already exists in the system. If the card was added previously by swiping, you will not see the same card number as you see printed on the card itself. When you add a card by swiping, the card number is in raw hexadecimal format, which means the numeric value looks different.

A

Event Reference

The list below defines all possible Edge Solo events. The events in red display in red in the management console.

Event	Descriptions
Granted Access	Door unlocked for the person listed.
Granted Access-Manual	Door unlocked when someone clicked **Grant Access** in the management console.
Granted Access-Extended Time	Door unlocked for the person listed, using the extra time setting.
Denied Access-Card Not Found	Door did not unlock. This card is not set up.
Denied Access-Schedule	Door did not unlock for the person listed. The person tried to access the door outside the assigned schedule times.
Denied Access-Card Expired	Door did not unlock. The card has expired.
Denied Access-Unassigned Card	Door did not unlock. The card has been set up, but it is not assigned to anyone.
Time Set	Someone changed the time setting in the management console.
Door Unlocked	Someone clicked **Unlock Door** in the management console.
Door Locked	Someone clicked **Lock Door** in the management console.
Door Unlocked-Scheduled	Door unlocked by the door unlock schedule
Door Locked-Scheduled	Door locked by the door unlock schedule
Alarm Acknowledged	Someone acknowledged alerts from the management console.
Door Forced Alarm	Someone forced the door open.
Door Held Alarm	Someone held the door open beyond the set time.
Tamper Switch Alarm	Someone tampered with the card reader or its enclosure.

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