HandPunch Template Management

User Manual

by Advanced Tracker

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Contents

HandPunch Template Management

Overview

HandPunch Template Management is a utility program from Advanced Tracker, for managing employee hand templates on the HandPunch series of data collection devices from Recognition Systems Inc (RSI).

Version

This documentation covers version 1.0.0.1 of HandPunch Template Management, released 9/6/2007.

Note: Some of the screen shots in this document are from a previous beta version of the program, and may not exactly match the current version.

Installation

The program requires Microsoft .NET Framework version 2.0.

It can be installed on any computer, regardless of whether that computer has any other Advanced Tracker components or applications installed.

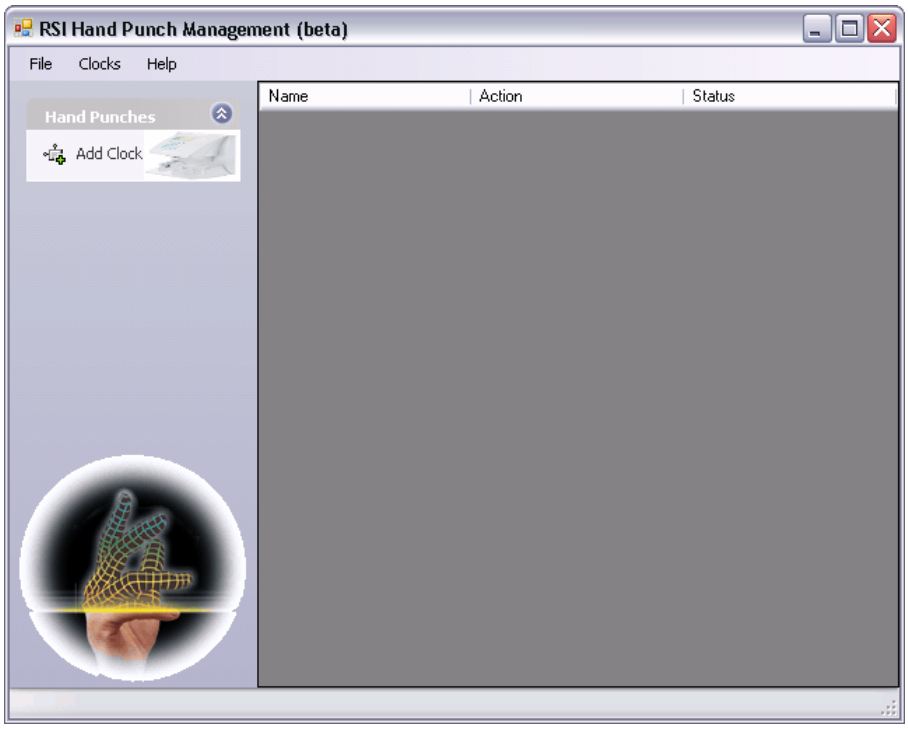
The installation file for this version is RSITemplatingSetup.msi.

HandPunch Template Management is stand-alone, and does not interact with the Advanced Tracker databases. All its information is stored in a file called Database.xml in the program's folder.

Operation

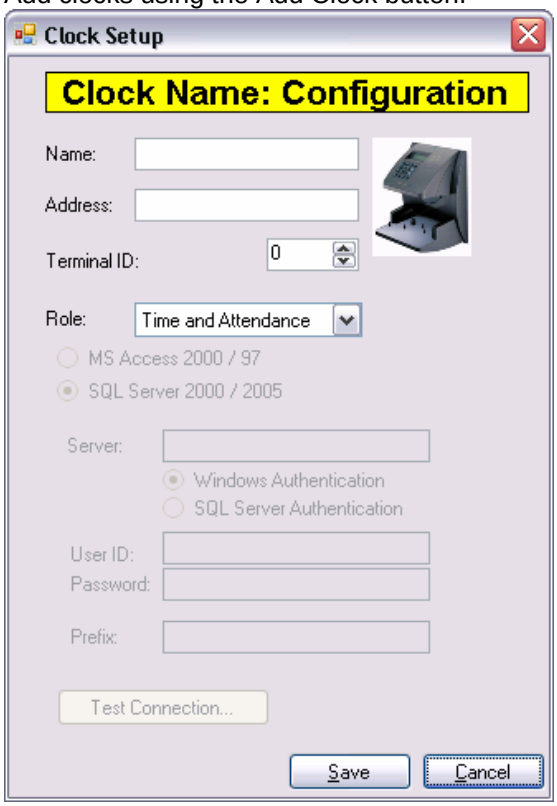
Run HandPunch Template Management using the shortcut in the Start menu. Go to Start> Programs> ATTI HandPunch Template Management> Template Management.

The main screen appears.



Adding a Clock

Add clocks using the Add Clock button.



Name: You can give any name to the clock, as long as that name is not already in use. The name does not need to be the same as in ATG or ETP, though for consistency you may choose to use the same name.

Address: for Ethernet clocks this is the IP address of the device with an optional port number (e.g., 10.10.4.11:10001) (the default port is 3001); for serially-connected clocks this is the serial port number (e.g., 2), for modem-connected clocks this is the phone number to dial (e.g., 1-604-555-1212).

Terminal ID: set the ID to match the ID that is configured into the device.

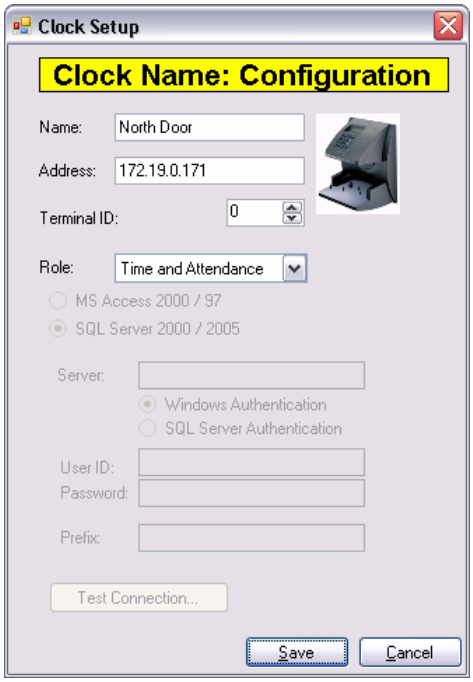
Role: You can define a hand punch to follow one of two roles, either a Time And Attendance terminal, in which case setup is now complete, or as a Door Access terminal, which enables more fields which need to be filled in to have the accepted door access records post into Access Tracker correctly. When defined in the Time and Attendance role you will use a separate application to poll and post the scans. When a clock is defined in the Door Access role, the name given to the clock must exactly match the code used when defining the clock within Access Tracker to ensure the scans are put in the correct location.

Options Specific For Door Access:

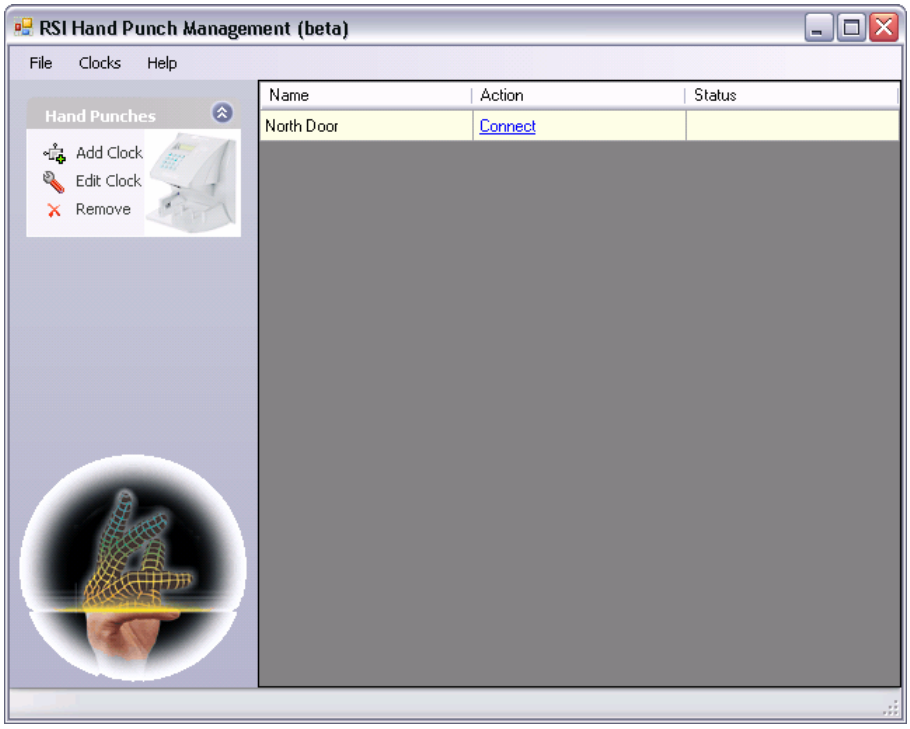
Skew: The Skew is an important feature to ensure maximum usage. Although an employee may have an access schedule defined which starts at 7:00 am and ends at 3:30 pm (essentially allowing the employee in or out the doors between those times) it's not really feasible to expect all the people to be ready and lined up at those times to scan in or out the door within 1 minute. The Skew setting allows a grace period before the permitted start and after the permitted stop times. As with all time zones in the RSI HandPunch, once any skews are added or subtracted from the start or stop times, the result is rounded to the nearest 6-minute interval.

MS Access 2000 / 97: When using MS Access as the backend database, a path for both Employee Tracker and Access Tracker must be set via UNC or mapped network drive.

SQL Server 2000 / 2005: When using SQL Server as the backend database, several fields are needed to establish a connection to the data. The Server can be the computer name, SQL Server instance name or IP address for the required SQL Server. When using Windows Authentication no extra username or password is needed, as the credentials of the currently logged in user are used. When using SQL Server Authentication you are required to enter a username and password valid for the SQL Server entered. The Prefix is a named set of data tables within the [Advanced Tracker] database in the SQL Server.



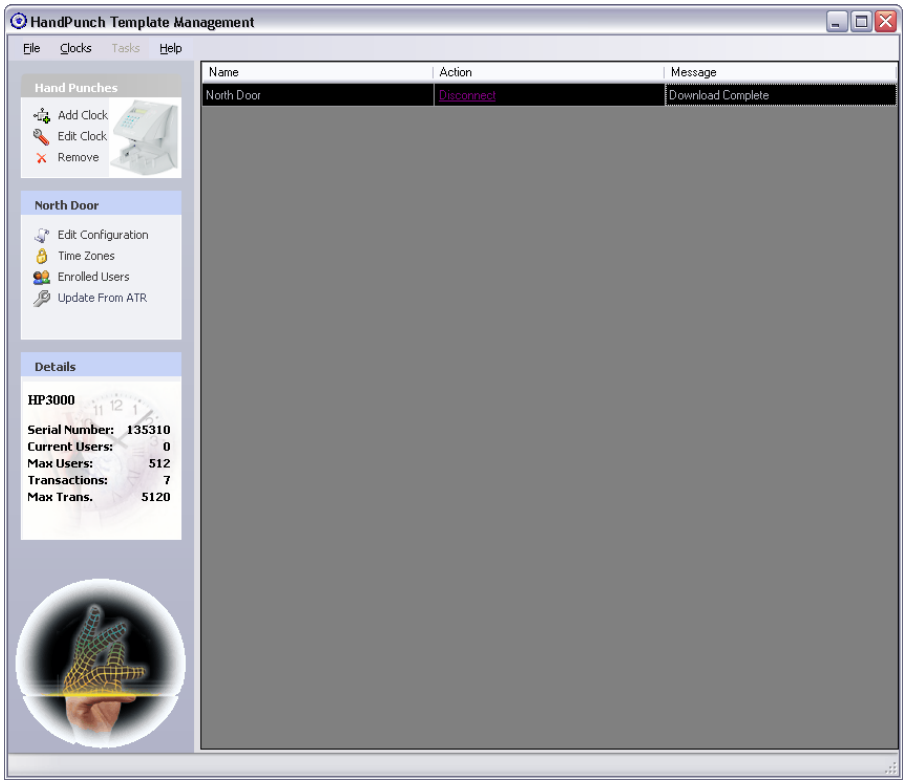
Once the clock has been added it will appear on the main screen.



To test the connection, press the Connect link in the Action column.

If the connection test is unsuccessful, the Action column may remain stuck on Stop Connecting. If so, press Stop Connecting to end the connection attempt, or close the program if Stop Connecting does not respond.

If the connection is successful, the screen will show the status as Connection Established, and will show the details of the device in the bottom left pane of the main window.



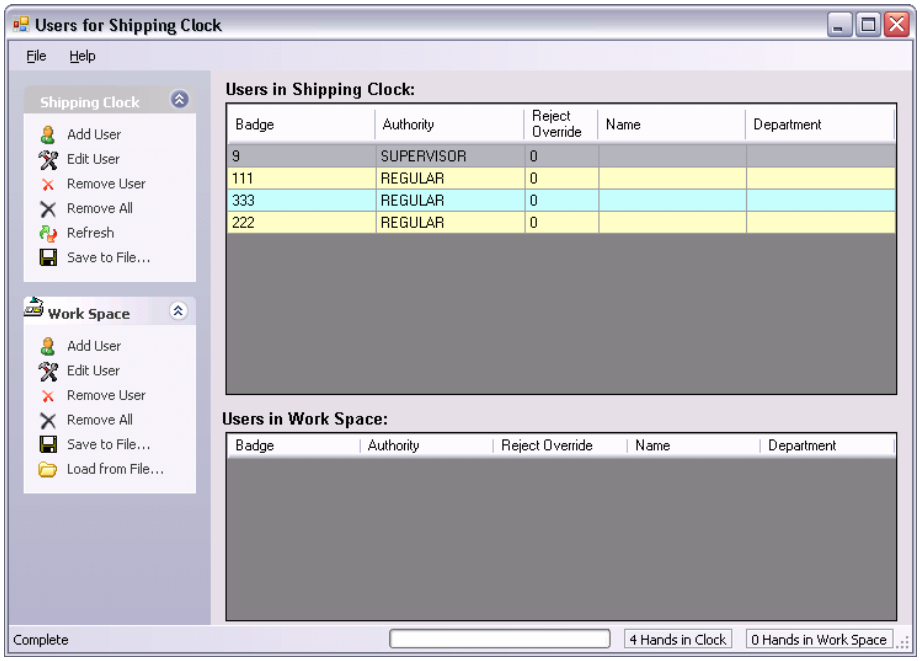
Add as many clocks as needed.

Viewing and Editing User Templates

Connect to a clock. After connecting, in the right pane, click on the line for the clock. The line will turn a slightly different colour from the rest of the clocks. You will see the details of the selected clock in the bottom-left Details pane.

In the middle-left pane, click on Enrolled Users.

The Status will briefly show Downloading Bank while the program collects the user information from the device. Once all the users have been read, the Users screen will be shown:



The top-right pane shows the users who are currently configured in the clock.

Each user has the following attributes:

- Badge – the number that the user types to the HandPunch
- Authority – Regular indicates that the user can only scan in and out, Supervisor indicates that the user can add and delete users from the HandPunch
- Reject Override – if set to zero, means that the user's scan will be rejected if the score exceeds the HandPunch's default rejection threshold, if set to non-zero means that this user has his own rejection threshold
- Name and Department – in this version these are not used

You can change any user's attributes by clicking on the user (the line turns grey to indicate it is selected) and then clicking the Edit User function.

Copying User Templates

You can copy a single user, or you can copy multiple users. In either case the basic principle is the same: copy from the source clock into the Work Space, then copy from the Work Space into the destination clock. If you have multiple destination clocks, you will need to do the second step multiple times.

About the Work Space

The Work Space is used as a holding area for copying users from one clock to another. It's similar to the Windows clipboard that you use when doing Copy and Paste in other programs.

The Work Space is managed by you. You add users to the Work Space by copying them from a clock. You delete users from the Work Space using the Remove function. Users remain in the workspace until you delete them. Users will stay in the workspace between runs of the HandPunch Template Management program.

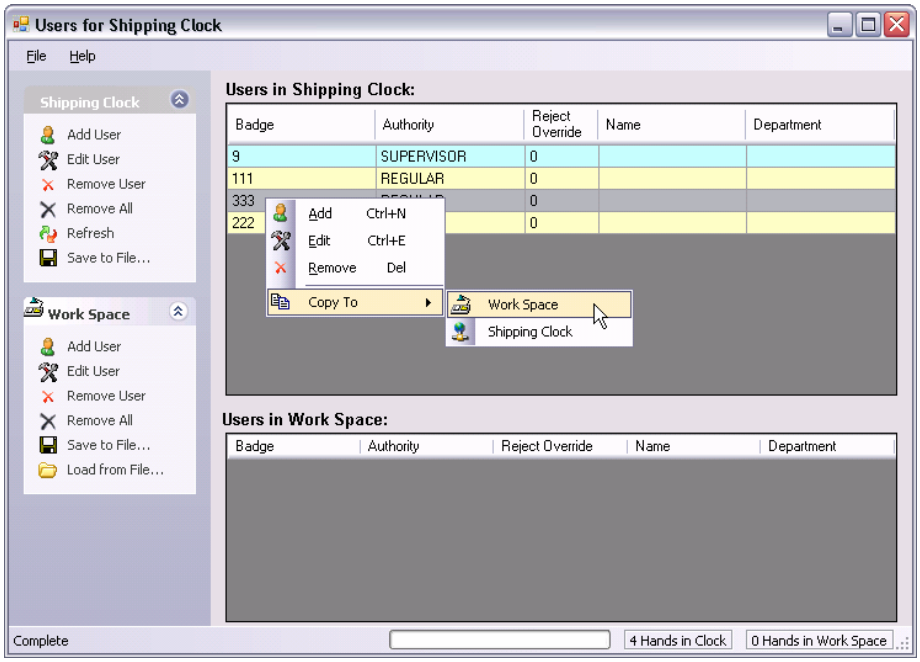
How to Copy One User

When a new user has been added to one clock, and you want to copy that user to other clocks, you need to follow a two-step operation: 1) copy the user to the Work Space, and 2) copy the user from the Work Space to each of the other clocks.

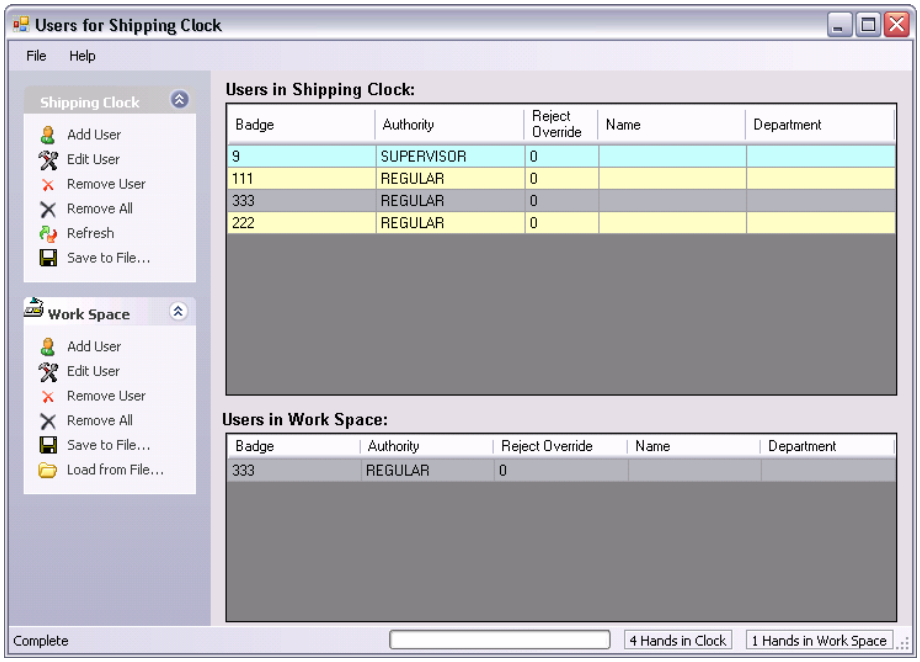
1) Copy from source clock to Work Space

Connect to the source clock, and then click on Enrolled Users to retrieve the list of users in the source clock.

In the top-right pane, click on the new user to make it the active user. *Hint: new users are typically near the end of the user list.* The active user will turn grey to indicate that it is selected. Then right-click and select Copy To> Work Space:



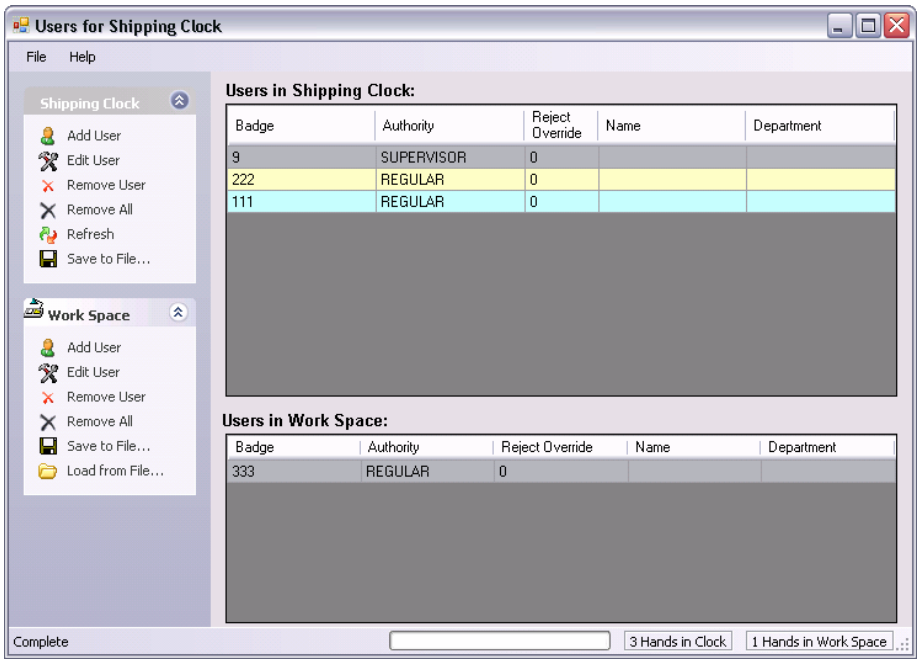
The new user will now be in the Work Space, added to whatever users may have already been in the Work Space.



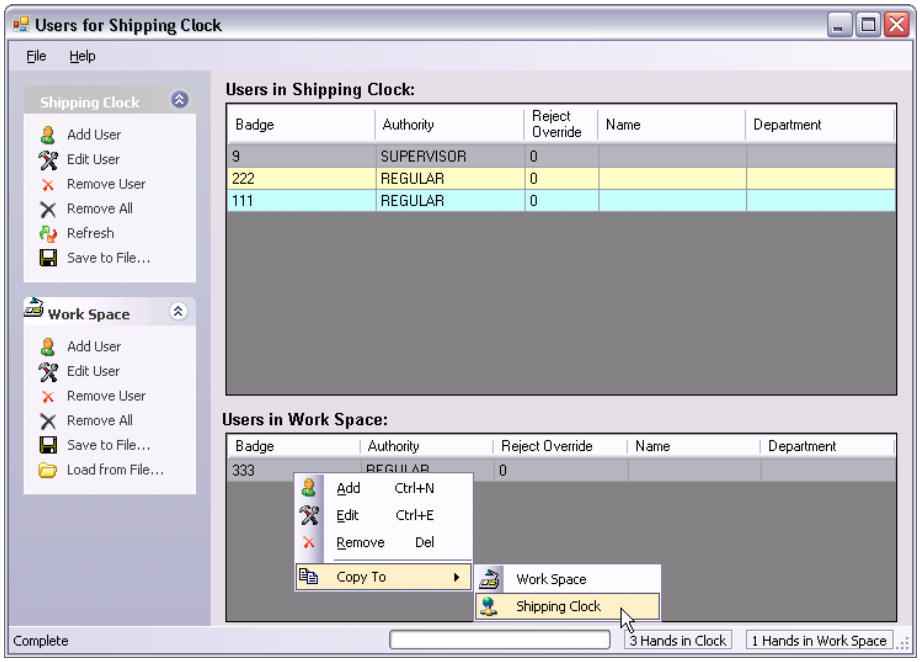
Close the Users for Shipping Clock window.

2) Copy from Work Space to another clock

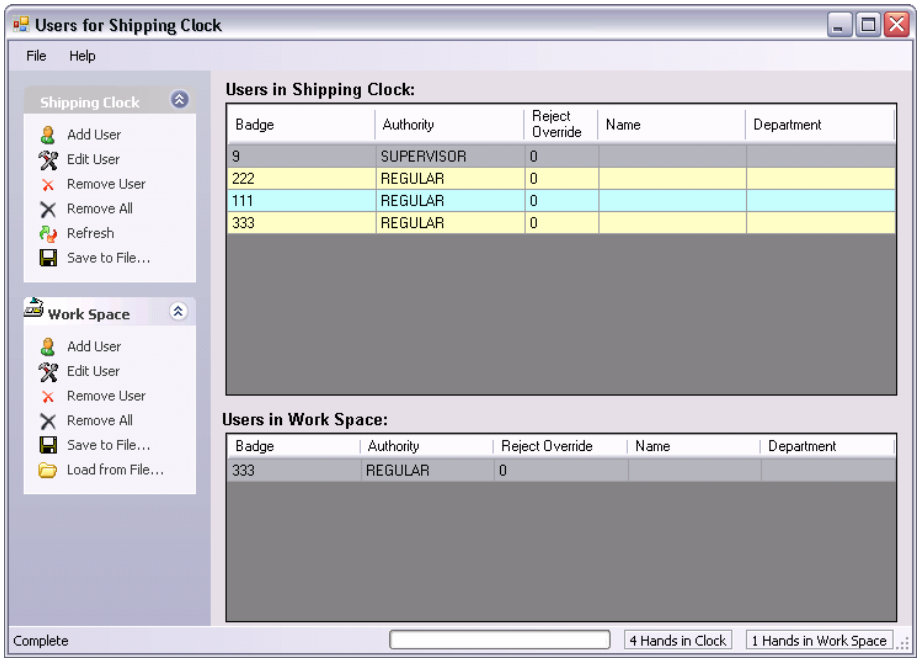
Click on the line for the destination clock, and then click on Enrolled Users. The top-right pane will show the list of users currently enrolled in the destination clock.



Click on the new user in the Work Space (it will turn grey), then right-click and select Copy To> Shipping Clock:



This will copy the new user to the destination clock in the top-right pane.



Repeat step 2 for any other clocks the new user needs to be copied to.

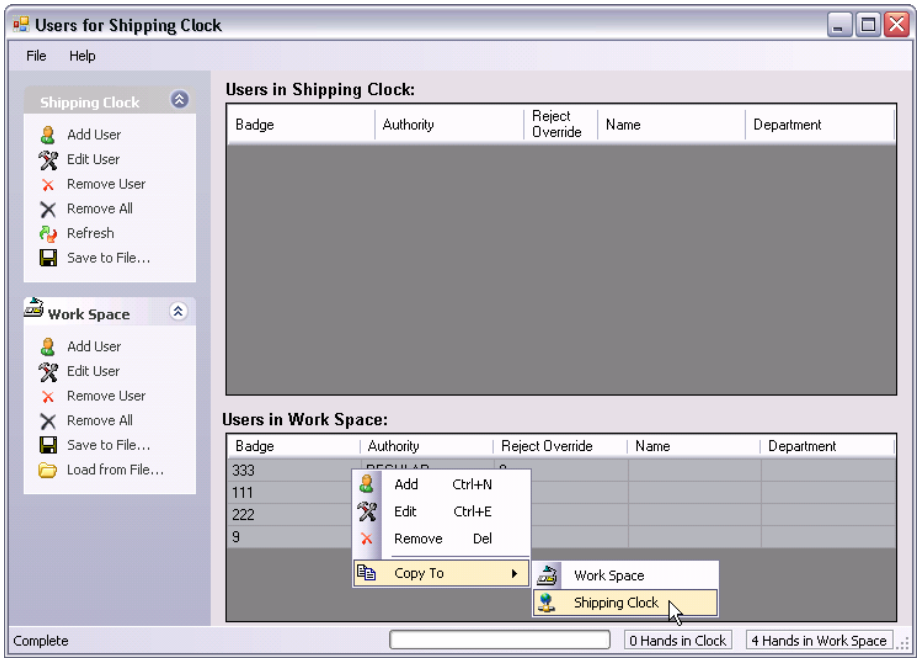
How to Copy Multiple Users

Copying more than one user is achieved by putting multiple users into the Work Space, and copying multiple users from the Work Space.

Hint: the selected items are the ones with a grey background.

You can select and copy them to the Work Space one at a time. Or if the multiple items are next to each other in the top-right pane, you can select a group of items by clicking on the first item and dragging the mouse onto the last item. Once the group is selected, right-click and select Copy To> Work Space.

Similarly you can copy multiple items from the Work Space to the current clock by clicking and dragging to select multiple items in the Work Space, then right-click and choose Copy To> Shipping Clock.

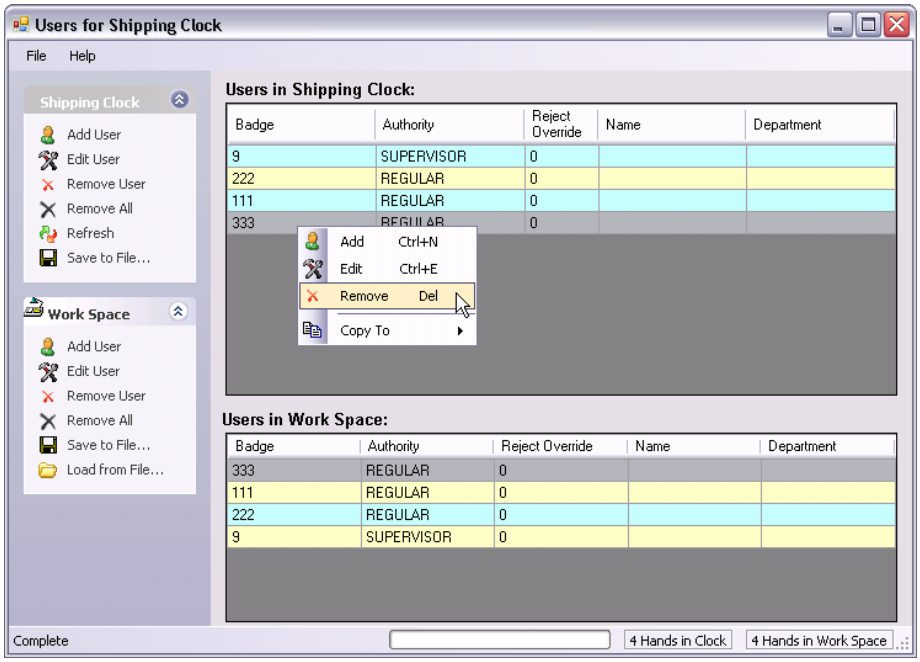


Removing User Templates

You can delete user templates from the clocks using the program. Typically this is done when the user is no longer with the company.

You may also do this when the user's badge number has been changed. You should delete the user's old badge so that she no longer uses it.

1. Connect to the clock.
2. Click on Enrolled Users.
3. **This step is important.** Click on the user in question in the top-right pane. Make sure the line is grey.
4. Right-click and select Remove, or click on Remove User in the top-left pane.



If the user is enrolled in multiple clocks, repeat this operation for each clock.

Renumbering User Templates

The program does not support renumbering a user. To renumber, first you must register the user's hand in one of the clocks using the new number, then copy the new user template to any other clocks where the user will need to scan. Don't forget to delete the user's old ID from the clocks.

Working with Clock Groups

The program does not support clock groups. All user maintenance must be done on a per-user per-clock basis.

Time Zones

All models of RSI HandPunch have 62 Time Zones available, 60 of which can be user-defined. Zone 0 is an 'Always Allow' zone and Zone 61 is 'Never Allow'.

Whether using the HandPunch in a 'Time and Attendance' or 'Door Access' role, you can view and manually adjust these zones by connecting to the clock and clicking the 'Time Zones' link on the left-side of the main application window. This will present an opportunity to view or adjust the 60 user-definable time zones.

***Note**: Making manual adjustments to these time zones for a clock defined in a 'Door Access' role is subject to overwriting when the application generates and assigns the time zones based on the access schedules defined within Access Tracker.*

When entering values for the Start and Stop time, the values you enter may be rounded as the RSI HandPunch only accepts times of day rounded to a 6-minute interval.

Once you have manually adjusted the time zones, click the [Update] button to send the new time zone information to the RSI HandPunch.

Update From ATR

Once the clock connection has been setup and confirmed, you can now instruct the RSI Template Management Software to construct and assign the Time Zones based on the information contained within Access Tracker.

The dialog window for this operation shows the multiple steps being performed, and any problems that arise will be detailed in the lower section.

Manual User Enrollment

With Time Zones define in the Handpunch there is a slight change to the manual employee enrollment. Now when an employee is added you must specify the initial time zone to be used. All units have the two pre-defined time zones of Always Allow (zone 0) or Always Reject (zone 61).

The employee should initially be set to one of these two zones until their Access Tracker defined schedule information is uploaded to the device.

Handpunch Scanning

When scanning at the RSI HandPunch with time zones enabled during a time when an employee is not permitted to enter, the scanner will immediately reject the employee ID and never prompt for the persons hand to be inserted. A message will appear on the unit saying "**Time Restriction**".

Automation

The RSI Template Management software supports several command line switches which can be used through scheduling software to automate the management of templates and time zones. Several different calls can be made via Windows Batch files, and the calls will always be made in the order specified.

UpdateATR
Syntax: /updateatr *clockname*

The UpdateATR switch will attempt to connect to the specified clock, generate and upload Time Zone information based on schedules defined within Access Tracker and also post the date and time at which employees entered the building. Because clocks defined for door access cannot contain

spaces in the name, there is no need to enclose the clockname parameter in quotation marks.

SaveTemplates
Syntax: /savetemplates "*clockname*" "*path**filename*"

This command will connect to the specified clock and save the current user enrollment information to the file specified. This command will overwrite the previous contents of the file.

AppendTemplates
Syntax: /appendtemplates "*clockname*" "*path**filename*"

This command will connect to the specified clock and append the current user enrollment information to the file specified. If a badge already exists within the file it will be updated with the new enrollment information. If the badge does not currently exist in the file it will be added.

LoadTemplates
Syntax: /loadtemplates "*clockname*" "*path**filename*"

This command will connect to the specified clock and upload the templates defined in the file specified. Any badges which currently exist in the clock are updated with the information within the file, and any new badges are added. Badges which exist in the clock but are not found in the specified file are not affected.

ClearTemplates
Syntax: /cleartemplates “clockname”

This command will clear the current user templates within the clock specified.

Glossary of Terms

badge

The user's badge number is the ID that the user types at the HandPunch before presenting the hand for verification.

pane

A pane is an area of a window. A window may be separated into top and bottom panes, or left and right panes, or a combination of both.

template

The template is the numeric representation of the employee's hand. It is not an image of the hand, but a numeric value that is derived by measuring 90 different points of the hand's geometry. The template value is stored in the clock, and is used for comparison when the employee enters her badge number and scans her hand.

user

In HandPunch jargon, a user is anyone who uses the HandPunch, either for scanning in and out, or for supervisory functions such as registering more users in the HandPunch.

Work Space

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