# Introduction

This guide will review creating Weekly Rules and the items needed for the Weekly Rules. Weekly Rules provide access to a User with a credential, unlock door(s) on a schedule or provide an Unlock with Badge schedule. These items are critical to providing access in and out of the building.

There are three items that are critical to creating these Rules. **WHO** will have access, **WHERE** will they have access and **WHEN** will they have access. These three items are combined when creating Weekly Rules.

1. WHO - Users and User Groups
2. WHERE - Access Points and Access Point Groups
3. WHEN - Weekly Schedules

A User is a person in the system that we assign credentials and rules to. For example, John Doe is a User, his credential is Badge 3535 and he is a member the Managers User Group. An Access Point is a reader controller or port on an IPBridge. Access Points can be added to Access point Groups for easy administration. Finally, the weekly schedule is time and days when Users will have access or the Access Point will be unlocked.

When creating Rules it is best practice to use Groups whenever possible. It is far easier to manage a group of one hundred Users then it is to individually manage one hundred Users. The same is true for Access Points. When the Rules are created for Groups it is extremely simple to add or remove items as necessary than to search through dozens or hundreds of items.

## Types of Rules in Pure Access™

The most common Rule is the Grant Access rule. This is providing access to a group of Users **(WHO)** to a group of Access Points **(WHERE)** during a Schedule **(WHEN)**. There are a couple different ways to do this. The most common, and simplest, is to simply link a group of Users to a group of Access Points with a Schedule. In the example below, any Users in the IT group have 24/7 access to any Access Points in the IT Access Point Group.



*Figure 1 - Simple Grant Access Rule*

A second way to create these Rules is to create User Groups based on Roles in the company and Access Point Groups by who will need access to those areas. In the example on the next page we have a similar situation as the previous example. Users in the IT User Group have 24/7 access to any Access Points in the IT Closet, Common Doors and Electrical Closets Groups. Common Doors may be Access Points that anyone has access to, the other two groups are specific to different roles in the company.
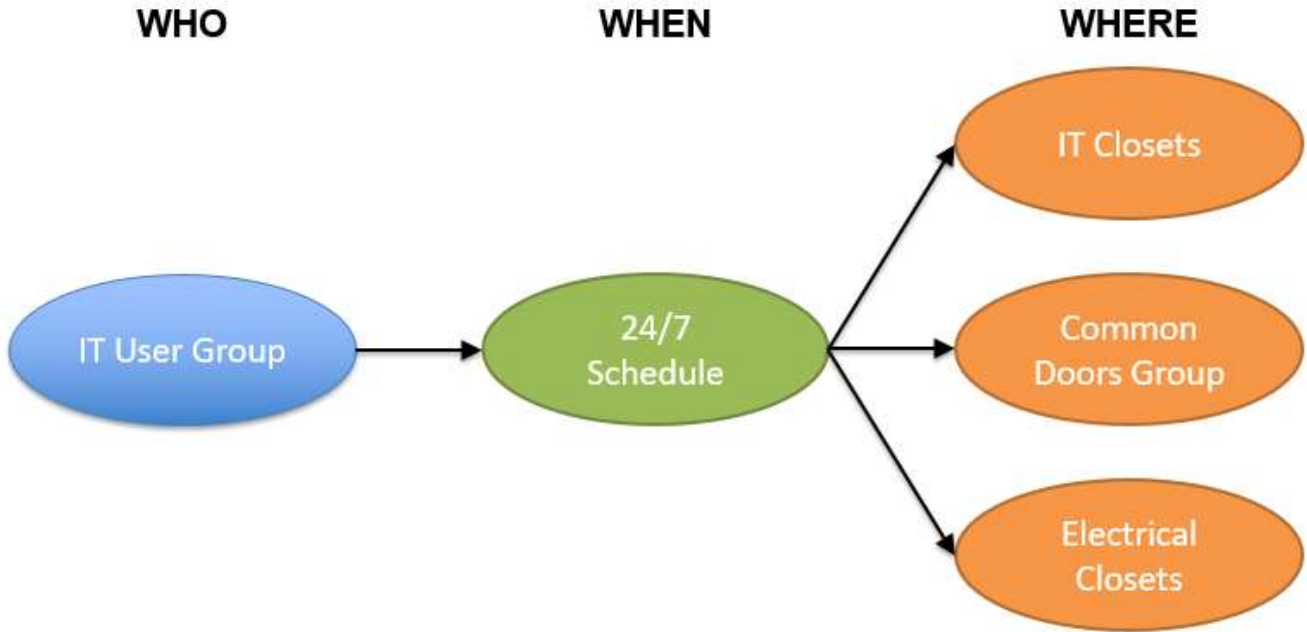
**WHO**　　　　　**WHEN**　　　　　**WHERE**



*Figure 2 - Using Multiple AP Groups*

The final method of creating Rules is the most complex and is typically used when utilizing our Microsoft Active Directory integration. In this method Rules are created by directly correlating roles in the company to Access Points they need access to. In the example below IT Users need access to the Common Doors into the Building, IT restricted areas and Electrical restricted areas. This is achieved by putting the User into multiple User Groups.
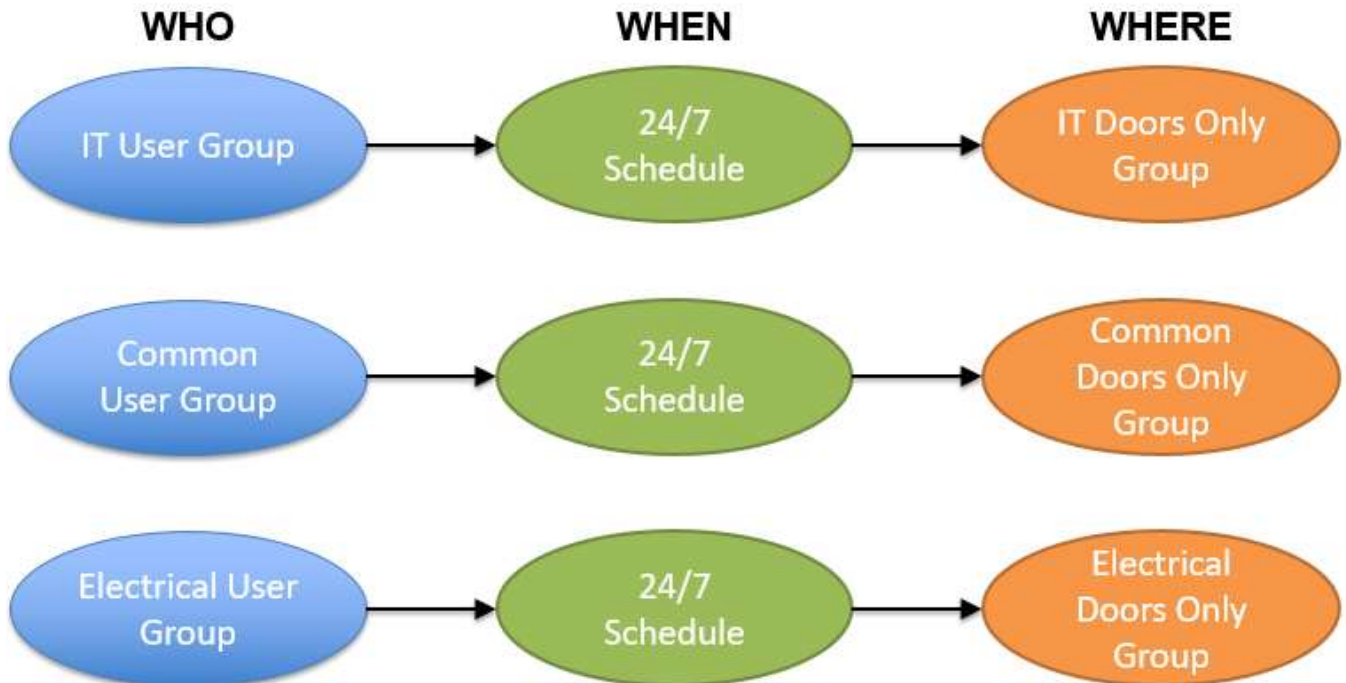


*Figure 3 - Multiple User and AP Groups*

# Creating Rules in Pure Access

The first step is to creating Rules is to determine **WHO** will need access **WHERE** and **WHEN**?  Take a piece of paper, open a spreadsheet, etc and make three columns.  One column will be who, the second where and the final column is when.  This could be as simple as providing 24/7 access to everyone to all doors.  It can also be very complex restricting Users to certain doors during certain times.  Review the different scenarios and look for any overlap or room to simplify your rules.  In general, keep Rules as simple as possible.  Remember you will now have a digital audit log of who went where and when!  Once everything is written out and documented it is time to start creating our Groups!

In the following steps, we will review a tenant in Pure Access creating a rule for their cleaning crew that cleans in the evenings and Saturday.  For this example, it has been identified anyone who is part of the cleaning crew will need access at certain doors Monday to Friday 5:30pm to 11:30pm and Saturday 8am-5pm.

## Step 1 – Creating User Groups (WHO)

Creating User Groups is extremely easy.  Login to your Pure Access tenant and click on **Users → User Groups** and click the add button ⊞.  The only thing mandatory here is to give the group a name and click **Save.**
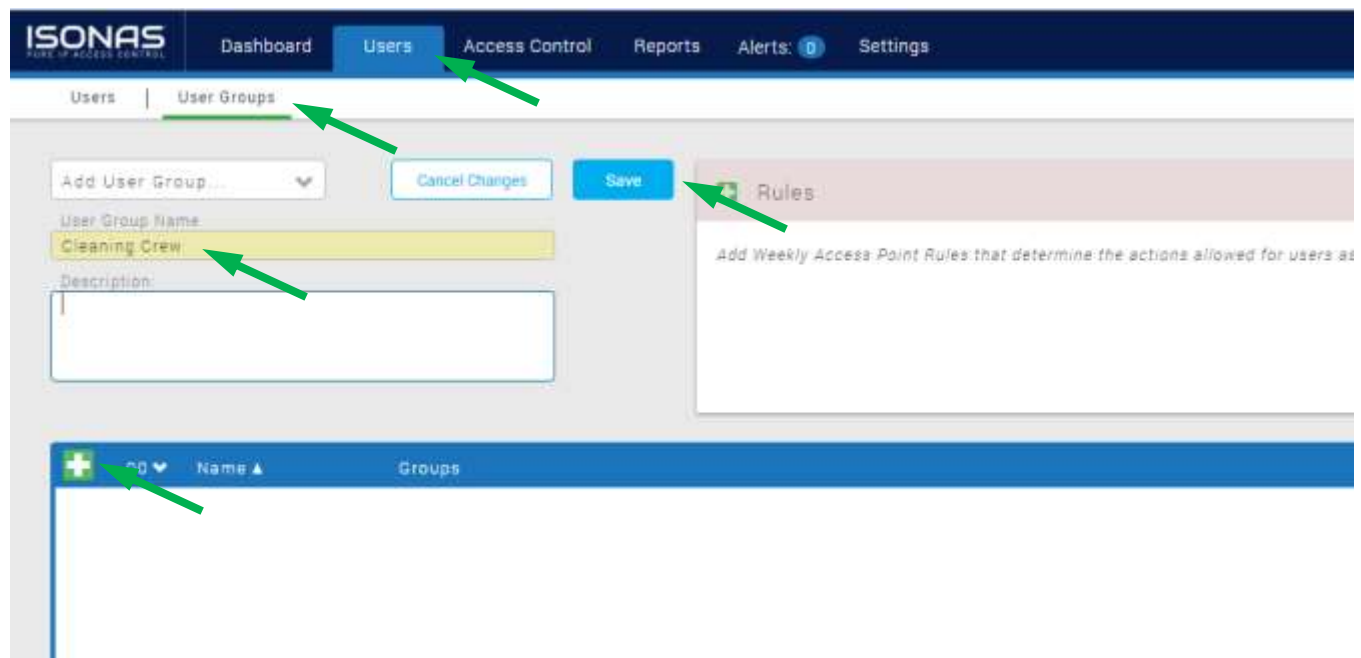


*Figure 4 - Adding a User Group*

If there are already Users in Pure Access, they can also be added here be clicking the add button ⊞ in the lower half of the screen (see above figure).  Select the User(s) to be added to that group and click the **Add** button in the popup window (see figure on next page).  In this case Jan Kowalski and Anders Anderson are part of the cleaning crew so we will add those people to the Group.
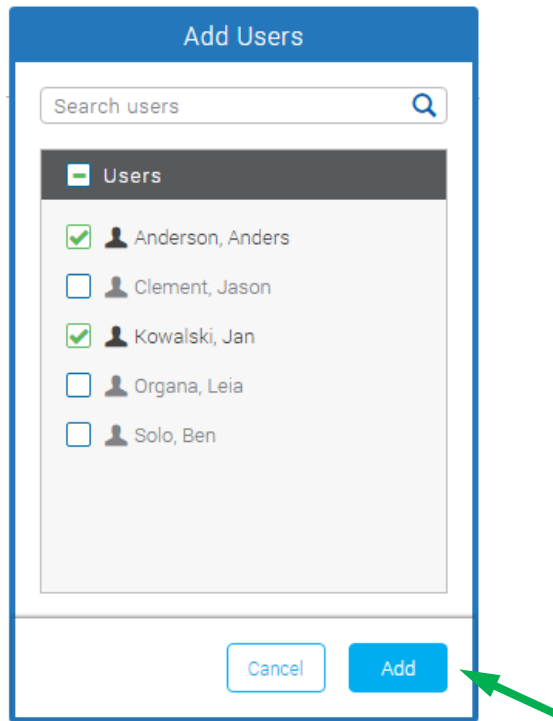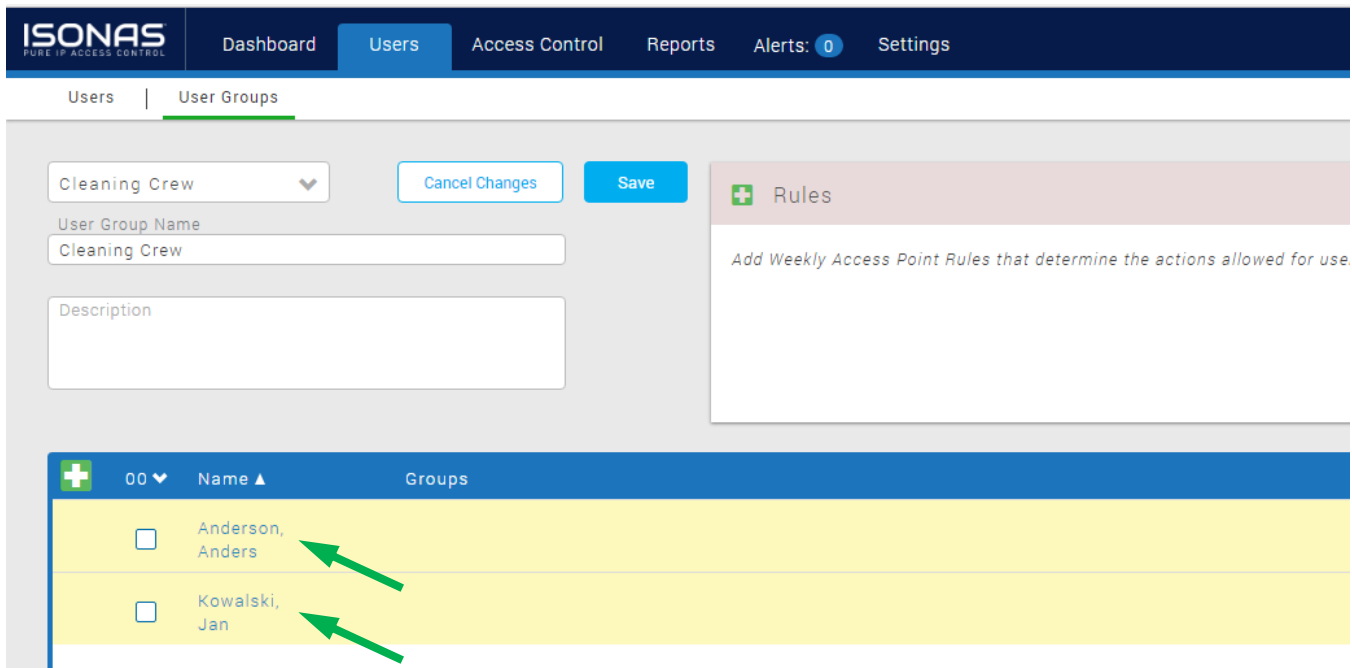
*Figure 5 - Adding Users to a Group*



*Figure 6 - Users in the User Group*

## Step 2 – Create Access Point Groups (WHERE)

Creating Access Point Groups is extremely easy. Login to your Pure Access tenant and click on **Access Control → Access Point Groups** and click the add button ➕. The only thing mandatory here is to give the group a name and click **Save**.



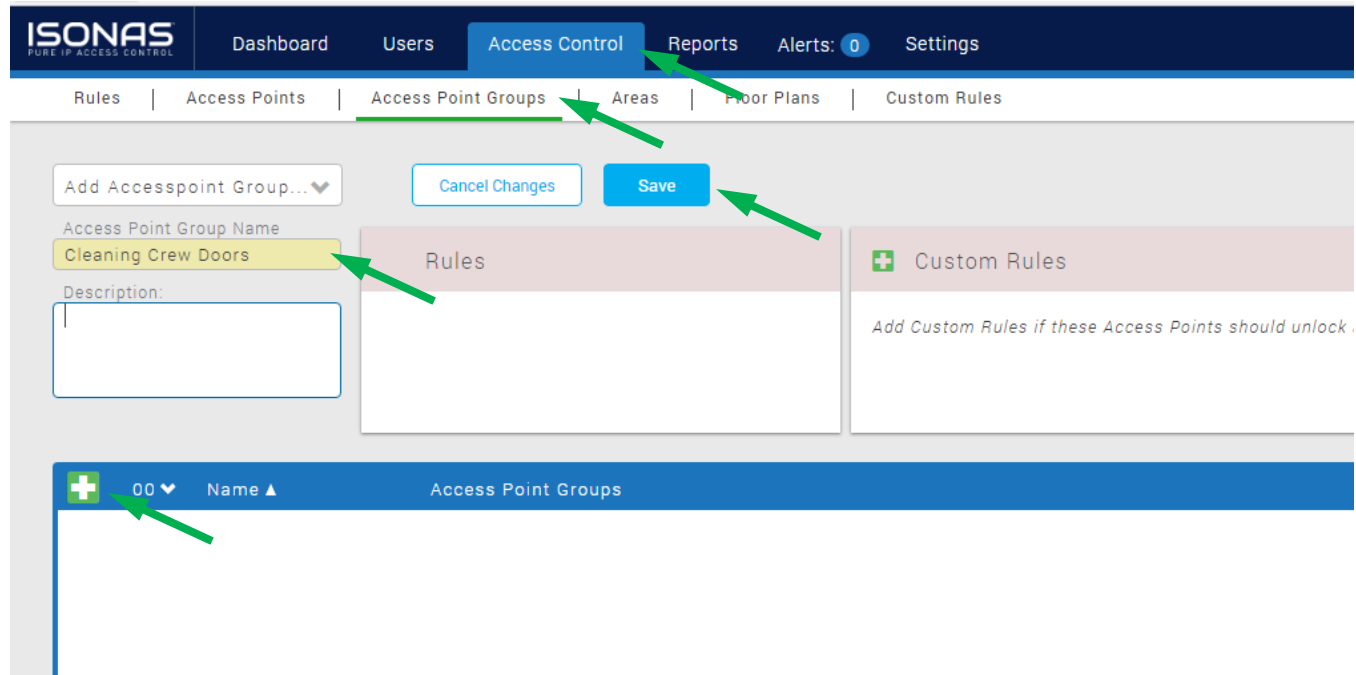*Figure 7 - Adding an Access Point Group*

If there are already Access Points in Pure Access, they can also be added here by clicking the add button ➕ in the lower half of the screen. Select the Access point(s) to be added to that group and click the **Add** button in the popup window. For this example, the cleaning crew will have access to Teachers Entry where they will enter the building, Maintenance Room and Front Office.
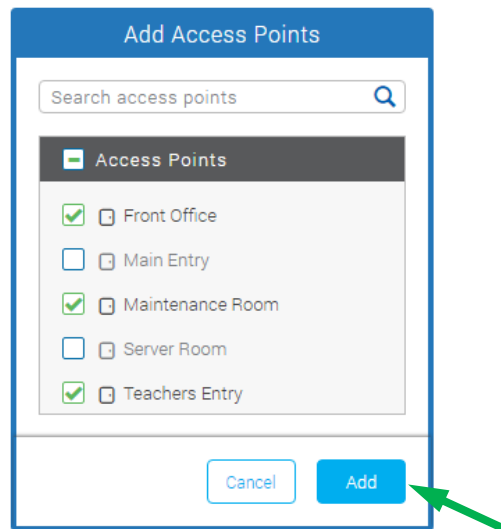


*Figure 8 - Adding Access Points to a Group*

*Figure 9 - Access Points in the Group*

## Step 3 – Create Weekly Schedules (WHEN)

Creating Weekly Schedules is very easy. Click on **Access Control** and then the **Schedules** tab below the main menu. Add a new schedule by clicking the add button ➕ .



*Figure 10 - Weekly Schedules Page*

Provide a name and choose a Schedule type:

- Non-Holiday – This schedule will apply unless a Holiday is set to override it
- Holidays – This schedule will apply precedence if it is a Holiday that day
- Always – This schedule will work regardless a Holiday is scheduled or not

Set your days using one of the predefined sets or choosing specific days.  Finally choose the hours the schedule is active and click the **Add** button.  The cleaning crew needs access Monday to Friday 5:30pm to 11:30pm and Saturday 8am to 5pm.  They will also need access during Holidays as they still come in on those days.

| Tech Tip! |
| --- |
| When creating schedules clearly label the schedule and do not use schedule for more than one purpose! For example, do not use a schedule used for Grant Access for an Unlock schedule.  If a schedule is assigned to more than one Rule changing the schedule will change all the Rules using it! |



*Figure 11 - Creating a Weekly Schedule*

## Step 4 – Create Weekly Rules

Now that the Groups and Schedules have been created, you can put all of them together and create the Rules. Click on **Access Control** and add a new Rule by clicking the add button ➕ .
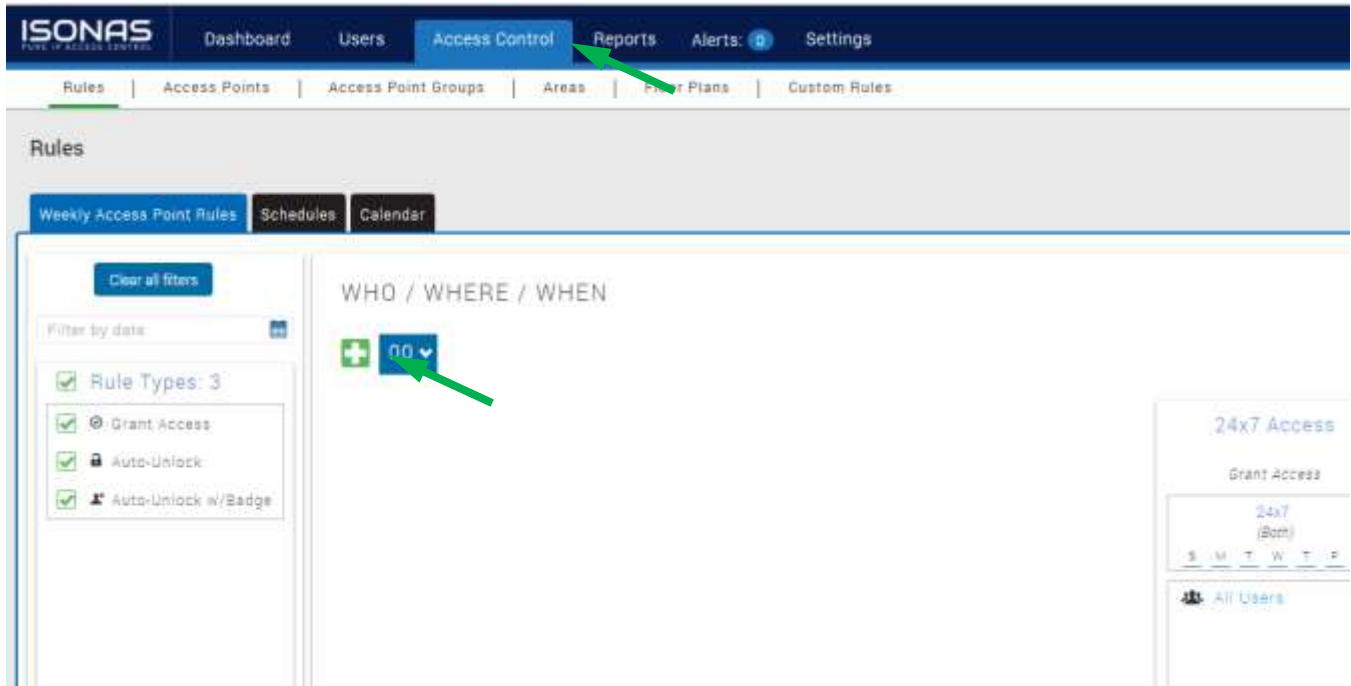


*Figure 12 - Weekly Access Point Rules Page*

In the new pop up window the Rule can be configured. There are three types of Rules:

- <u>Grant Access</u> – Anyone added to the User Group will have access to the group of Access Points during the schedule assigned.
- <u>Auto Unlock</u> – Any Access Points or group of Access points will unlock and relock using the schedule provided. Users are not associated with this rule type because no badge is required to change the door state.
- <u>Auto Unlock w/Badge</u> - Any Access Points or group of Access points will unlock and relock using the schedule provided *if* someone in the User Group assigned is presents their badge during the schedule assigned.

Once the rule type has been chosen simply drag and drop the WHO / WHERE / WHEN items from the left side to the right side of the screen. The left side being the available items configured and the right side being the items in the rule itself. Alternatively, the radio button can be clicked and the green greater than symbol can be used to move items over. Only one portion of the available items (WHO, WHERE, WHEN) will be shown at any one time. Click on the line to show the other items.

| Tech Tip! |
| --- |
| While it is possible to create rules from individual Users and Access points it is strongly discouraged. Groups are far easier to configure and administrate as the system grows. |

The three items created in the previous steps will be combined into the Weekly Rule that will provide access to our cleaning crew. This will be a Grant Access rule and we simply move our groups and schedule from left to right and click **Add**.
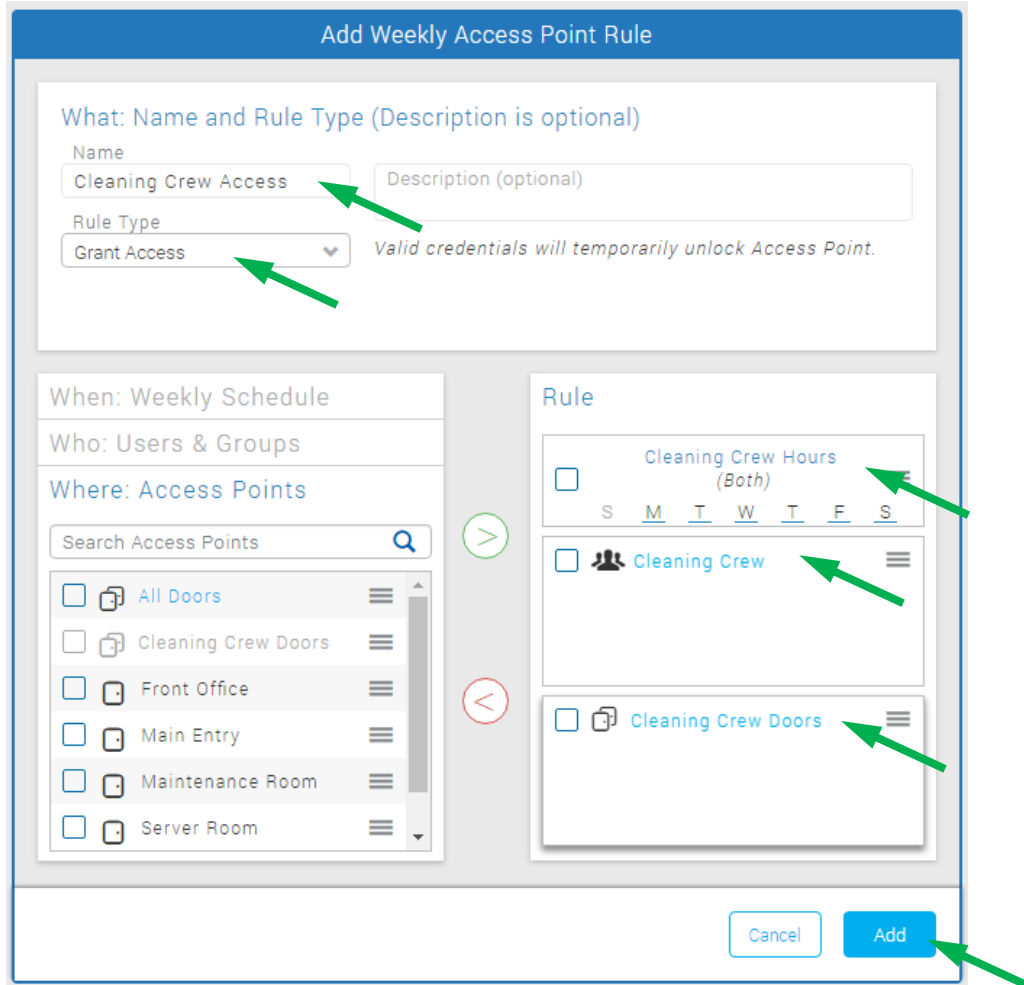


*Figure 13 - Creating the Weekly Access Point Rule*

## Step 5 – Create Holidays (If Necessary)

Creating Holidays is very easy. Click on **Access Control** and then the **Calendar** tab below the main menu. Add a new Holiday by clicking the add button ➕ next to Holiday. Simply fill in the name and date(s) and click the **Save** button. After saving the dates will show up on the calendar providing a visual representation (see figures on following pages).
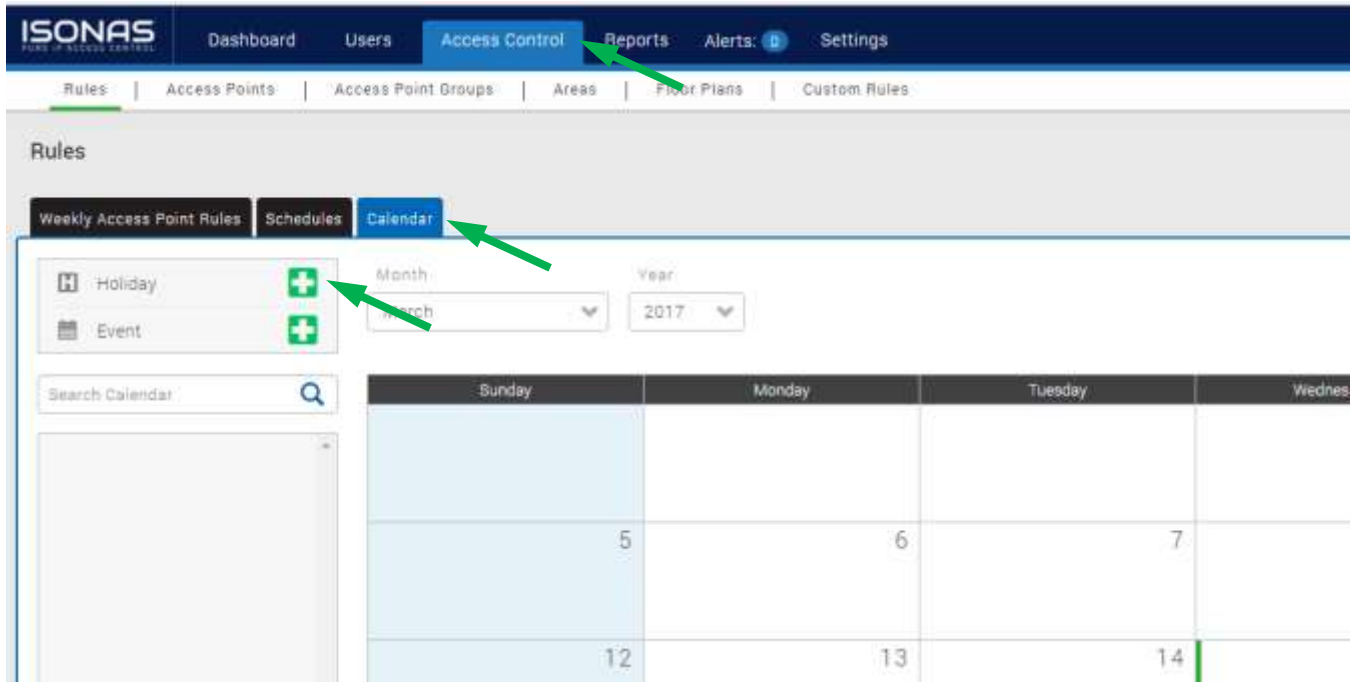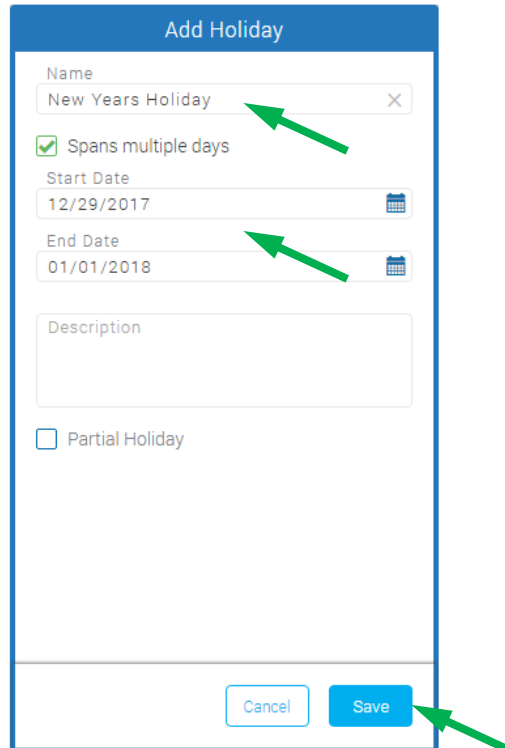
*Figure 14 - Calendar Page*



*Figure 15 - Configuring the Holiday*

*Figure 16 - Holidays Displayed in Calendar*

# Frequently Asked Questions

- My schedule needs to span across midnight, what do I do?

  You will need to create two schedules. One ending at 23:59 and the second one starting at 00:00

- I created a Rule but it doesn't seem to work!

  Remember to Run an Update in Pure Access, this button is in the upper right corner of the web client.