Honeywell

Pro-Watch Access Management Portal

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User Guide

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PW Access Management Portal

In this chapter...

General Introduction

Features & Benefits

Chapter Overview

Prerequisite: Enabling the Access Management Tab in

Advanced Badging

Adding, Editing, or Approving a Clearance Code

Raising a Clearance Code (CC) Request

Approving a Clearance Code (CC) Request

Manage Requests

Manage Approvals

Manage Access Area

Activating Backups

1 General Introduction

The automated access management helps you leverage more of your Pro-Watch systems' capabilities and improve your productivity.

By adding the Access Management Portal Module to your Pro-Watch system, you can streamline your card-holder access request process with an automated approach. With intuitive web-based interfaces for requesters and administrators, the Pro-Watch Access Management Portal eliminates the hassle of processing access rights manually, saves time and reduces errors.

You can easily check access rights, recent activity, and pending tasks with one system. Better yet, approvers get an email notification when a status changes, so you don't have to waste time searching for status updates. It's identify management made quick and easy.

2 Features & Benefits

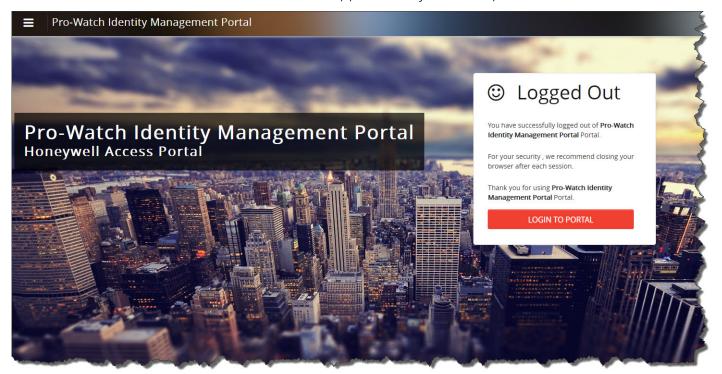
Access Management Portal:

- Provides a cost-effective way to manage access requests.
- Improves productivity and reduces workload on approvers with web-based workflows.
- Makes your process more efficient and secure and saves time by speeding up approvals.
- Enables automated processing of access request eliminates entry errors to help ensure compliance.
- Maintains auditing data on approvals and access changes to meet compliance requirements.
- Enables customizable approval workflow to meet the needs of your unique business.
- Generates email alerts to notify approvers of new requests to keep workflow process moving.
- Dashboard provides efficient way for approvers to view new, pending and processed requests to effectively manage who has access to their areas.
- Improves employee satisfaction with self-service approach to requesting and reviewing status of access rights.
- Offers a convenient web-based portal that allows badge holders to request access changes, view their status and recent activities at any time.
- Provides badge holders with an easy-to-search list of available clearance codes from which to choose.
- Offers a clearance code list which can be customized to address business needs, such as limiting areas of high security or special access requirements.
- Provides flexibility by supporting requests for temporary or permanent access
- Offers an optional notes field which accommodates additional details that you can add to the request
- Offers a software solution which is simple to install and configure with no additional hardware to purchase.

3 Chapter Overview

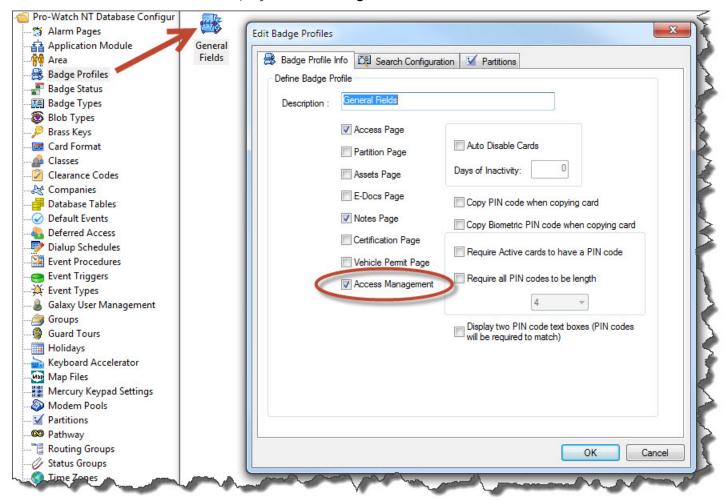
This chapter explains:

- 1. How an employee or badge-holder can raise a clearance code request in Access Management Portal (IMP), and
- 2. How a clearance code owner can approve or reject the request.



4 Prerequisite: Enabling the Access Management Tab in Advanced Badging

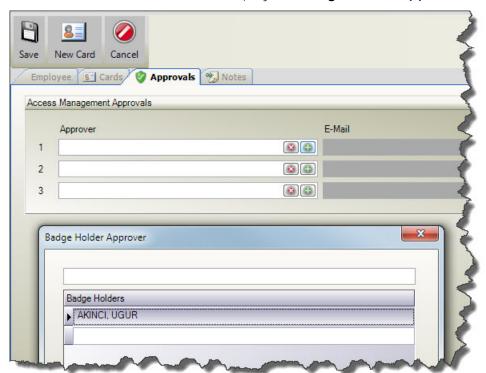
- 1. Before you can use the Access Management Portal (IMP) you must enable and display **Access Management tab** in the badge profile.
- 2. In Pro-WatchDatabase module, click Badge Profiles to display the **Badge Profile**. Double click to display the **Edit Badge Profile** screen:



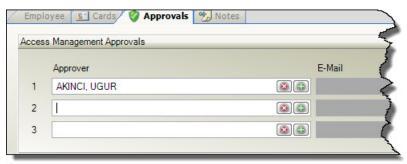
3. Select the **Access Management** check-box to make sure the **Approvals tab** will appear on all **badge-holder records** in **Advanced Badging**, as shown below:



- a. To add or edit an Approver from inside the badge record, click the **Edit** button to enable the editing mode.
- b. Click the **Add** ("+") button to display the **Badge Holder Approver** dialog box:



c. Select an **Approver** from the list and click **OK** to display the name in the **Approver** field:

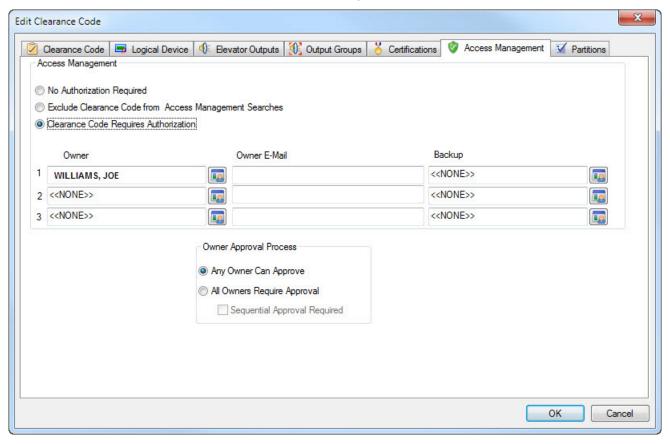


Note: If the Badge Approver name is set as shown above, then the Badge Approver has to approve the request first before it goes to Clearance code owners. If there is no Badge Approver name set, all requests would be directly gone to Clearance Code/Access Area owners.

d. To delete an Approver, click the **Red** delete button after the approver's name.

5 Adding, Editing, or Approving a Clearance Code

1. In **Database Module > Clearance Codes**, right-click a clearance code to display the pop-up menu. Select **Properties** to display the **Edit Clearance Codes** screen:



- 2. Select the Access Management tab.
- 3. Select one of the following options:
 - **No authorization required.** Clearance Code is granted to the user without any approvals.
 - Exclude Clearance Code from Access Management Searches. The clearance Code will not be found by any searches. This option can be useful for clearance codes needed to access highly sensitive and critical areas.
 - Clearance Code requires Authorization. If you select this option, the user must secure the approval of one or more clearance code owners, depending on the choices explained below.

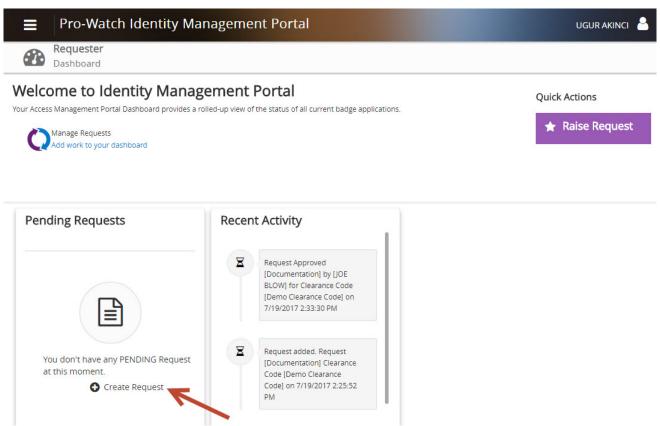
Enter the **Owner Name**, and **Backup** person's name. **Owner Email** will be populated automatically from the database.

4. Select one of the following options:

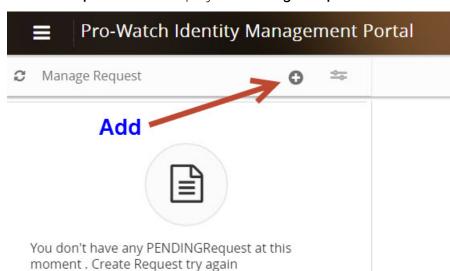
- Any Owner Can Approve. Any one or two of the owners as well as all three of them can approve the clearance code request.
- All Owners Require Approval. The owners can approve in any order.
- Sequential Approval Required is enabled when you select "All Owners Require Approval". When you select this option, the first owner needs to approve first, the second owner the second, and the third owner needs to approve as the third person.

6 Raising a Clearance Code (CC) Request

1. Log in to the **Access Management Portal (IMP)** to display the **Requester Dashboard** page:

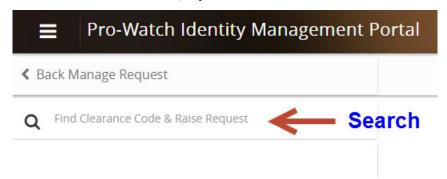


IMP uses your Windows credentials to fill in the user info automatically.

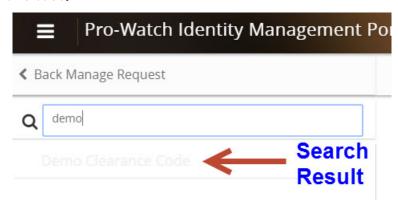


2. Click **Create Request** link to display the **Manage Request** screen:

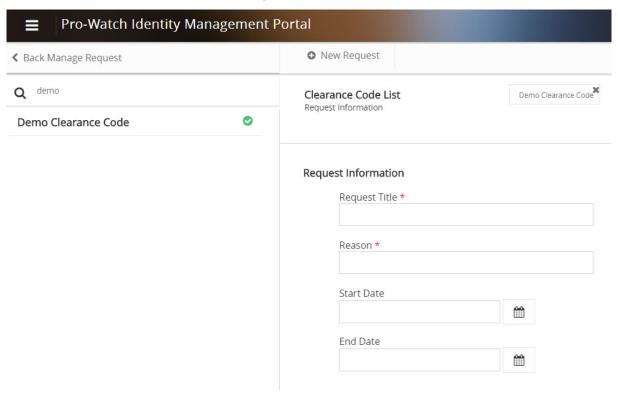
3. Click the **Add** ("+") button to display the **Search** screen:



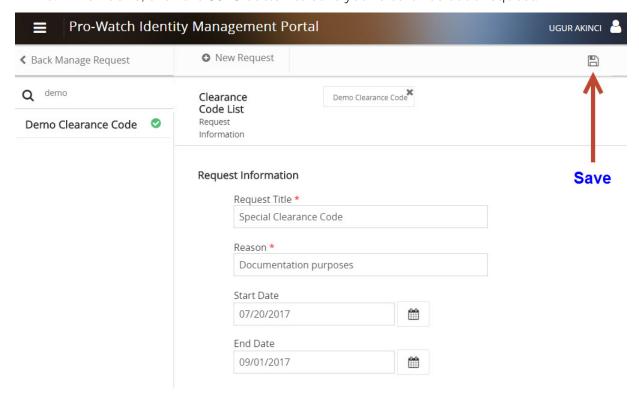
4. Type the **search key word(s)** ("demo" in this case). If a clearance code starting with that key word(s) exists, the portal will display the **search result** ("Demo Clearance Code" in this case):



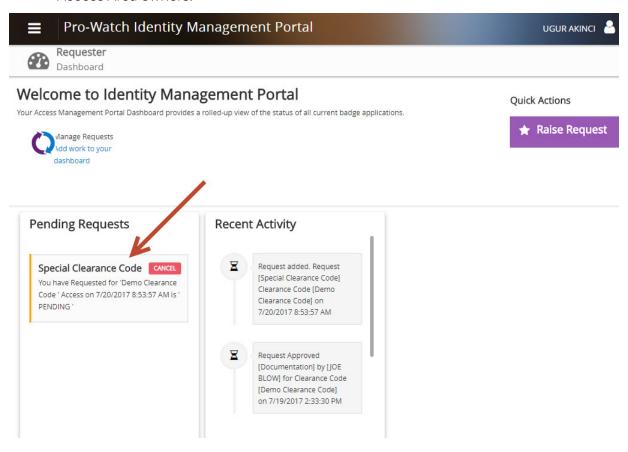
5. Click the search result to display the details pane on the right. Fill in the details:



6. When done, click the **Save** button to save your clearance code request:



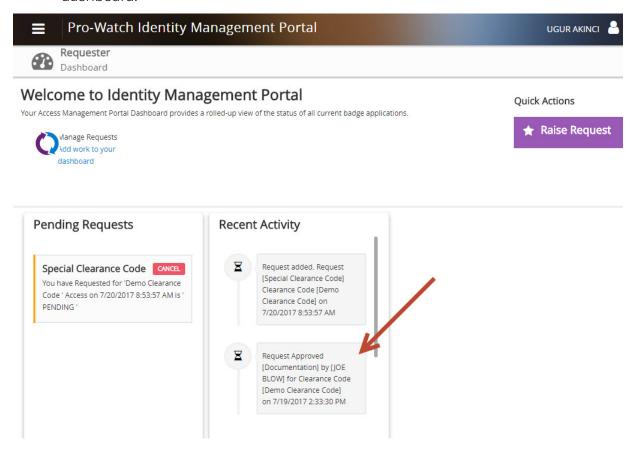
7. Back in the **Requester Dashboard**, note that your request is now in a **pending** mode and it **needs to be approved** by the Badge Approver and/or Clearance Code/Access Area owners:



Pro-Watch 5.0 offers the feature of informing Clearance code owners when employees raise a clearance code request. The owner can use the link in the email to Approve/Reject the request. Also, employees get an email update after their request is approved/rejected/canceled.

Note: The comments provided by the CC owner during approval/rejection of request, can be viewed at the "Request details tab."

8. When the CC owner approves the request, it'll be listed on the requester's dashboard:



9. Log out from the portal by clicking on the user icon on upper-right corner and selecting **Log Out** from the drop-down menu.

6.1 Email Intimation to Area Owners for New Requests

Pro-Watch 5.0 offers the feature of intimating Clearance code owners when employees raise a clearance code request. Owner can use the link on email to Approve/Reject the request.

Here is a sample request email provided here for illustration purposes. In this email, the access team is acknowledging the request **JOHN SMITH** has made for permission to access the **VEHICLE GATES**:

----- Forwarded message -----

From: "Access Team" < Access Team@access.com>

Date: Sat, Jun 9, 2018 at 10:04 PM -0400

Subject: New Access Request [Perimeter Gates] raised by JOHN SMITH

To: "John Brown" < John Brown@brown.com>

Pro-Watch Access Request

Hi JOHN BROWN,

A new access request from JOHN SMITH has been raised and is waiting your approval.

Request Details

| Requester Name | JOHN SMITH |
|------------------|-------------------------------|
| Reason | Drive on and off the facility |
| Access Area | Vehicle Gates |
| Access Start/End | 6/10/2018 - 6/16/2018 |
| Status | Pending |

To approve or reject this request, please click the following:

APPROVE / REJECT

Regards, Access Team

(Note: This mail is auto generated, please do not reply)

6.2 Email Intimation to Employees After Canceling Request

Here is a sample cancel-request email provided here for illustration purposes. In this email, the access team is acknowledging the cancellation of the request **JOHN SMITH** has made for permission to access the **VEHICLE GATES**:

---- Forwarded Message -----

From: "Access Team" < Access Team@access.com>

To: "John Smith" < John Smith@smith.com>

Cc:

Sent: Sat, Jun 9, 2018 at 10:35 PM

Subject: Request Cancelled [Perimeter Gates]

Pro-Watch Access Request

Hi JOHN SMITH,

Your access request Perimeter Gates has been cancelled.

Request Details

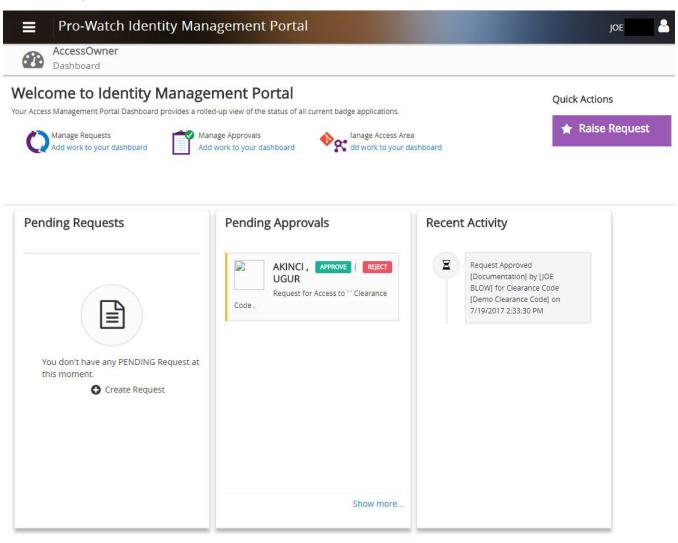
| Access Reason | Drive on and off the facility |
|------------------|-------------------------------|
| Access Area | Vehicle Gates |
| Access Start/End | 6/10/2018 - 6/15/2018 |
| Status | Cancelled |

Regards, Access Team

(Note: This mail is auto generated, please do not reply)

7 Approving a Clearance Code (CC) Request

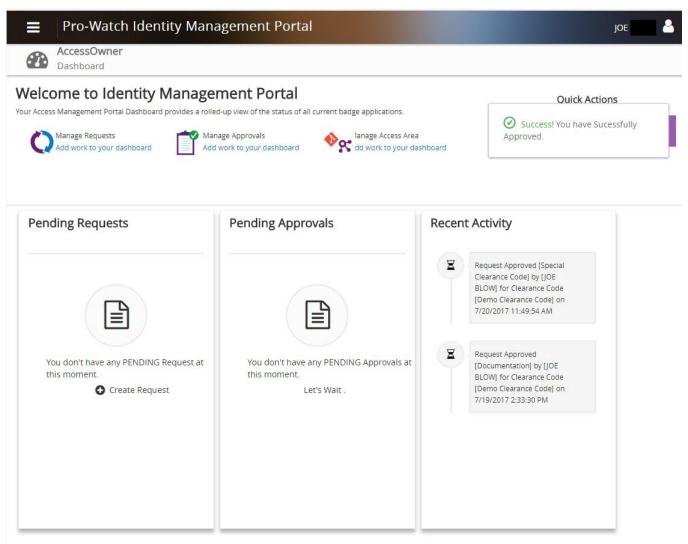
1. Log in to **Access Owner Dashboard** of the Access Management Portal by using your Clearance Code Owner user account User ID and Password:



- 2. Click **APPROVE** in the **Pending Approvals** box to approve the CC request. (Click **REJECT** in the **Pending Approvals** box to reject the CC request.)
- 3. When the system displays a warning message, click YES:



4. **Access Owner Dashboard** will by dynamically updated, this time not showing any pending approvals:



5. Log out from the portal by clicking on the user icon on upper-right corner and selecting **Log Out** from the drop-down menu.

7.1 Request Approval Intimation by Email

When the request raised is approved, the user receives an approval email from the access team.

Here is a sample approval email provided here for illustration purposes. In this email, the access team is approving the request **JOHN SMITH** has made for permission to access the **VEHICLE GATES**:

---- Forwarded Message -----

From: "Access Team" < AccessTeam@access.com>

To: "John Smith" < John Smith@smith.com>

Cc:

Sent: Sat, Jun 9, 2018 at 10:28 PM

Subject: Request Approved [Perimeter Gates]

Pro-Watch Access Request

Hi JOHN SMITH,

Your access request Perimeter Gates has been approved.

Request Details

| Access Reason | Drive on and off the facility |
|------------------|-------------------------------|
| Access Area | Vehicle Gates |
| Access Start/End | 6/10/2018 - 6/16/2018 |
| Status | Approved |
| Approved By | (JOHN BROWN, I'll allow it) |

Regards, Access Team

(Note: This mail is auto generated, please do not reply)

7.2 Request Denial Intimation by Email

When the request raised is denied, the user receives a denial email from the access team.

Here is a sample denial email provided here for illustration purposes. In this email, the access team is denying the request **JOHN SMITH** has made for permission to access the **VEHICLE GATES**:

---- Forwarded Message -----

From: "Access Team" <AccessTeam@access.com>

To: "John Smith" < John Smith@smith.com>

Cc:

Sent: Sun, Jun 10, 2018 at 9:21 PM

Subject: Request Denied [Perimeter Gates]

Pro-Watch Access Request

Hi JOHN SMITH,

Your access request Perimeter Gates has been denied.

Request Details

| Access Reason | Drive on and off the facility |
|------------------|--------------------------------------|
| Access Area | Vehicle Gates |
| Access Start/End | 6/11/2018 - 6/15/2018 |
| Status | Denied |
| Rejected By | JOHN BROWN |
| Comment | Need to attend driver training first |

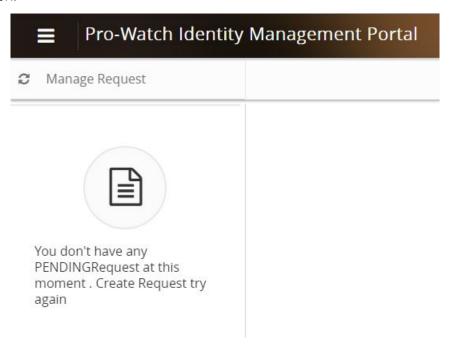
Regards, Access Team

(Note: This mail is auto generated, please do not reply)

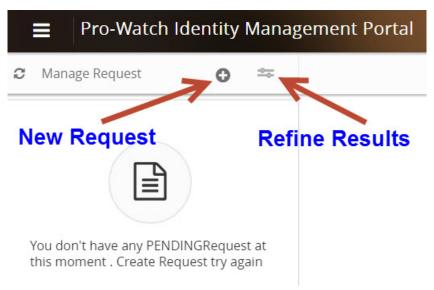
8 Manage Requests

You can manage clearance code (CC) requests both as a user/requester and CC owner. The interface and functionality is almost the same for both types of users.

1. As a CC owner, click the **Manage Requests** link to display the **Manage Request** screen:

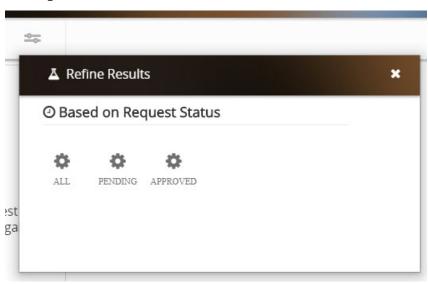


2. As a user (request raiser), click the **Manage Requests** link to display the **Manage Request** screen:

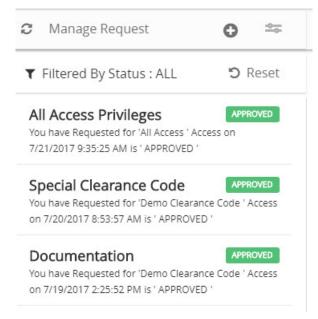


3. To add a new CC request, click the **NEW REQUEST** ("+") button.

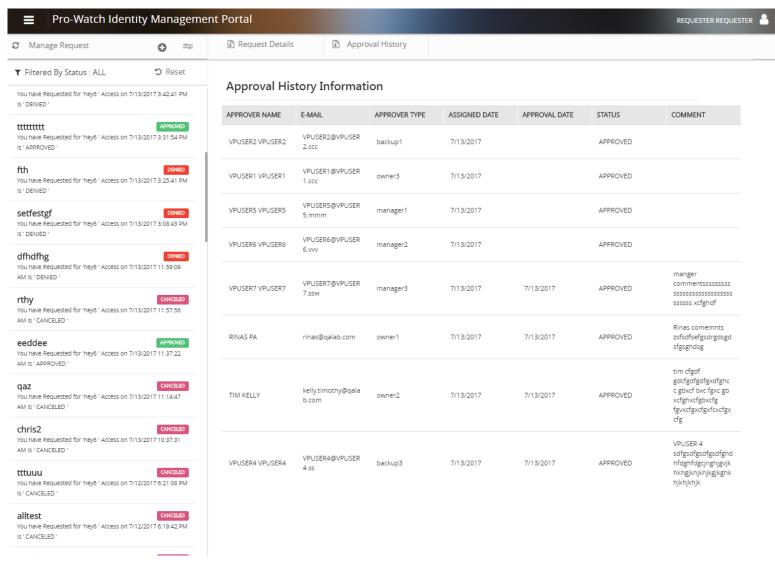
4. To perform a refined search, click the **Refine Results** button to display the Refine Results dialog:



5. To view only the pending requests, click the **PENDING** link. To view only the approved requests, click the **APPROVED** link:

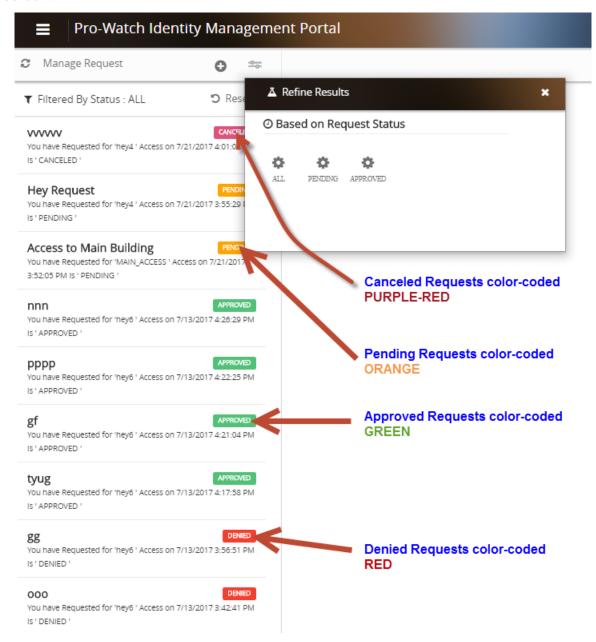


6. . Click the **ALL** link to view all requests regardless of status:



9 Manage Approvals

As a clearance code (CC) owner or Badge approver, you can manage your approvals easily by clicking the **Manage Approvals** link and displaying the **Manage Approvals** screen:

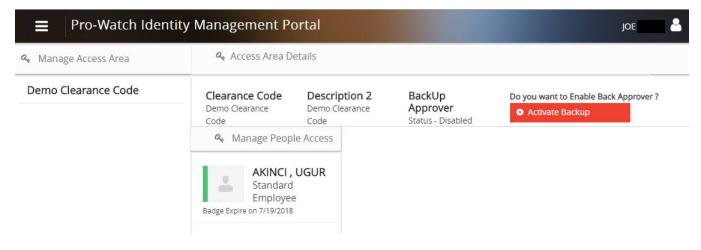


10 Manage Access Area

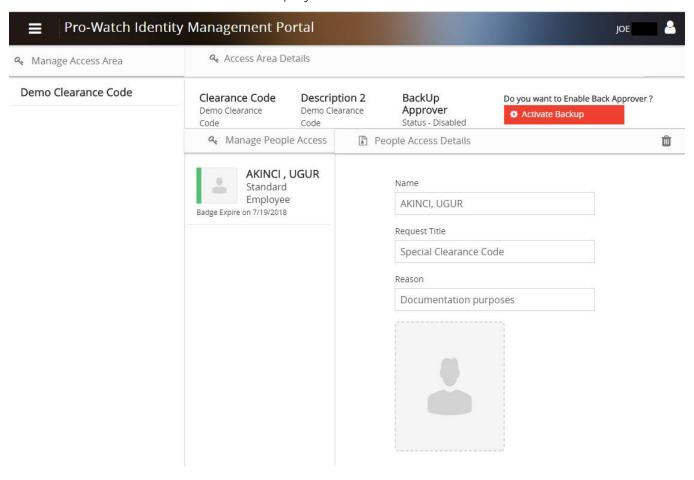
As a clearance code (CC) owner, you can manage the access requests by clicking the **Manage Access Area** link and displaying the **Manage Access Area** screen:



1. Click the CC you'd like to manage to display its details:



2. Click the raiser's name to display all the details of the CC:



3. To delete the CC request, click the **Remove Access** button:



11 Activating Backups

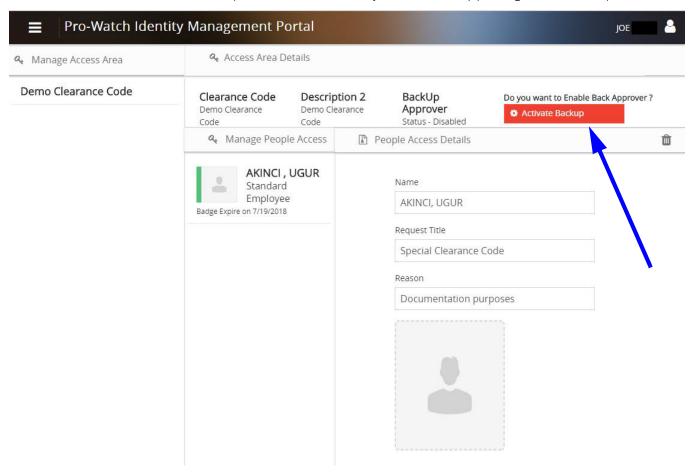
You have to be in the Clearance Code (CC) Owner account to activate the backups.

In certain situations (when the owner will not be available for approvals) the clearance code (CC) owner may need or want to activate the backup approver(s) configured earlier in the CC Access Management tab.

You can activate the backups either individually for each CC raised and globally for all the CCs.

11.1 To Activate or Deactivate the Backup of a Single Clearance Code Individually

1. To activate the backup, click **Active Backup** link on the upper-right of the CC panel.



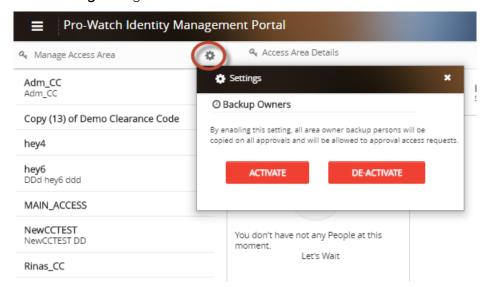
2. A warning message will ask you whether you'd really like to activate the backup:



- 3. Click **Yes**. The Activate link will now be dynamically switched to a **Deactivate** link.
- 4. To deactivate the backup, click the **Deactive** Backup link.
- 5. A warning message will ask you whether you'd really like to deactivate the backup.
- 6. Click Yes.

11.2 To Activate or Deactivate the Backups of All Clearance Codes Globally

1. Click the **Settings** button in the Manage Access Area to display the **Backup Owners Setting** dialog:



2. Click **Activate** to display a warning message:



- 3. Click Yes.
- 4. To deactivate all backups globally, click **Deactivate** in Step 2. When the warning message is displayed, click **Yes** to continue and deactivate all backups.

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