GTConnect Partner User Guide

Version 1.2

This technical document provides information about GTConnect, from the perspective of a partner

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Chapter 1: Preface

About GTConnect

GTConnect is a subscription service built to streamline your Human Capital Management processes and alleviate technology and data challenges. It provides a powerful remote device management and diagnostic tool that connects your devices and software throughout your partnership, creating an integrated network that can be managed in real time.

Remote Device Management

Manage & configure your devices centrally. Keep them up-to-date and secure

proactively & conveniently with a single click.

Identity Management

Biometric and personal data can be managed, distributed, and backed up securely and automatically across networked terminals to ensure you comply with data protection laws.

Remote Device Diagnostics

Access to our cloud diagnostic platform. Your team can provide ultimate support and service to customers with advanced tools including remote access, eliminating the need for engineer visits and reducing downtime.

Technical Support

GTConnect is supported via our dedicated Technical Support team. Providing guaranteed response and resolution times, minimising downtime and maximising productivity.

System Management

Seamless backup and recovery services. These ensure yours and your customers data is always secure, always available and automatically backed up in the cloud, providing unrivalled protection against data loss.

Data Management

Integration from devices to your HCM software with our 'cloud-to-cloud' Middleware platform, minimising development costs.

Communications can then be transferred using a single connection, reducing your operational costs.

What's Included?

GTConnect provides a single integration point for you and your data, using your technical specification. This means the transition, implementation or expansion of your devices is easy.

The key benefits of using GTConnect include:

- Remote Device Management.
- Remote Diagnostics
- Identity Management
- Data Management

Remote Device Management

Manage and configure your Grosvenor Technology networked devices centrally. Keep them up- to-date and secure pro-actively and conveniently with a single click. This allows you to remotely:

- Update applications.
- Update firmware and configuration files.
- View the status of each connected device.
- Update groups of devices together.
- Generate tablet invites.

Remote Diagnostics

Access the Cloud diagnostic platform. Your team can provide ultimate support and service to users with advanced tools, eliminating engineer visits, which reduces downtime and operational costs. This allows you to remotely:

- View log files.
- View and control each connected device.
- Reset & Configure connected device.
- Troubleshoot devices through the interactive view.

Identity Management

Biometric and personal data such as PINs, card numbers or preferences can be managed, distributed, and backed up securely and automatically across networked Grosvenor Technology devices to assist in compliance with data protection and privacy laws. This feature also allows your HCM software to understand and use Personal Identifiable Information (PII), such as biometrics, optimising the performance of the terminals and your software. This allows you to:

- Create groups for real-time distribution of data to all devices.
- Apply and manage your own data 'consent' and 'retention' policies.
- Secure storage and backup enrolled data.

Data Management

Our cloud-to-cloud middleware platform allows simplified integrations from your terminals to your HCM software, which reduces your development costs. Communication is then transferred via a single connection, which reduces operational costs.

Data management allows you to:

- Make real-time forward transactions from terminals to software.
- Automate import and distribution of employee data to connected devices.
- Automate import and distribution of configuration data to support operation of connected devices.

System Management

Leading data backup and recovery services. This ensures your and your customers' data is always secure, always available and automatically backed up in the cloud, providing peace of mind and unrivalled protection against data loss. This allows you to:

- Create disaster recovery backups for all data.
- Have high availability and elimination of maintenance and downtime.
- Single sign-on integration with existing IT systems.
- Have region specific hosting to meet data sovereignty requirements.

Related Documents

If required you should also refer to the following documents, available from Grosvenor Technology:

- Solution Design Documents, relative to your specific application
- Device User Guides, relative to the devices that you take
- GT Tablet User Guides

Technical Support

Technical Support can be obtained from Grosvenor Technology from the following points of contact:

Europe, Middle East, APAC and Africa

Phone:	+44 (0)1202 621700
E-mail:	HCM-support@grosvenortechnology.com
Website:	www.grosvenortechnology.com

North America

Phone:	+1 800.989.5197
E-mail:	HCM-USsupport@grosvenortechnology.com
Website:	www.gtclocks.com

Chapter 2: Getting Started

Who this Guide is for

This Guide is for employees from the organisations which represent GTConnect:

- **Partners**. Organisations that go to market in partnership with Channel-Partners and Companies, who have system-wide control of access and device allocation.
- **Channel-Partners/Companies**. Organisations that distribute the Channel-Partner's products/services, who also manage their Customers as Companies represented in the platform.
- **System-Users**. Manage devices and personal data.

This Guide is written primarily for Partners and provides details on how to use GTConnect and on the key tasks you are likely to perform; most of the information will also apply to Channel-Partners & Company users.

Logging in to GTConnect

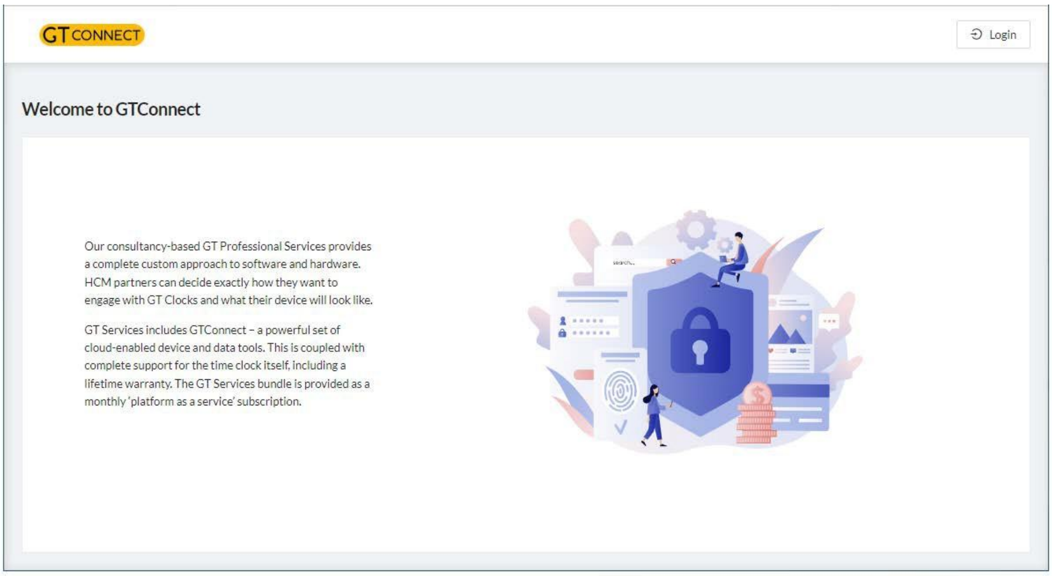
GTConnect is officially supported on the following browsers:

- Edge.
- Firefox.
- Chrome.
- Safari.

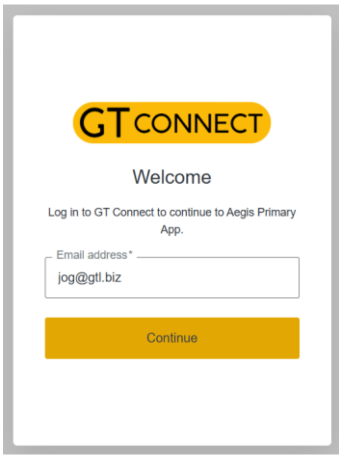
Note: the last two versions of each browser are supported.

To log in to GTConnect, do the following:

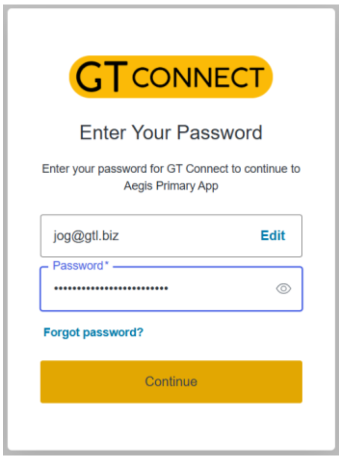
1. From your web browser, enter the issued GTConnect URL.



2. From the **Welcome** page, click **Login**.
3. In the **Email address** box, enter your email address.

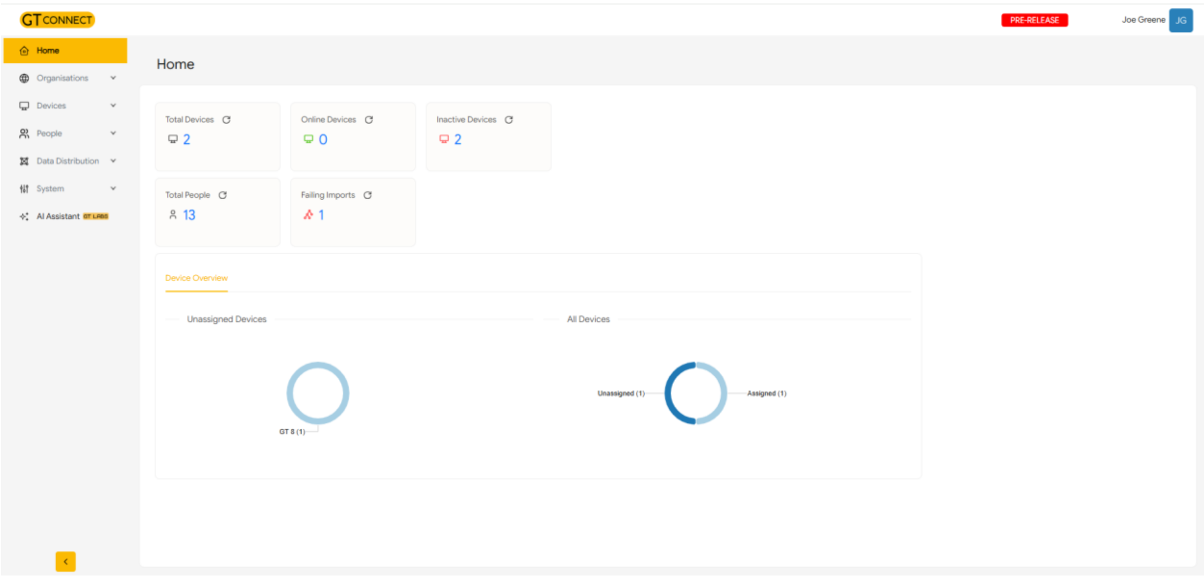


4. In the **Password** box, enter your password.



5. Click Continue.

The **Home** page will be displayed, where you can view dashboards around devices, people and imports.



Note: the GT Support team, if given access, can also view this information.

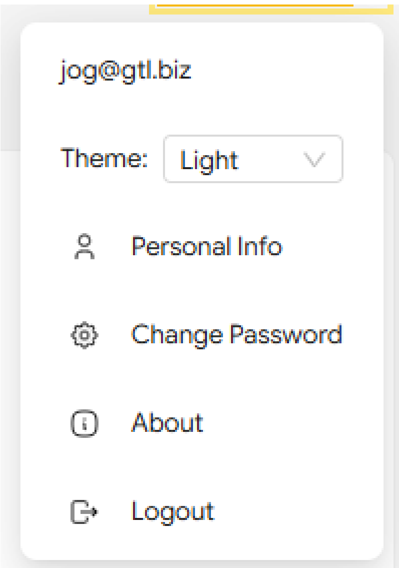
Signing on through SSO

Additionally, GTConnect now supports SSO integration. If you're interested in an SSO integration, please reach out to our professional services team for more information.

Quitting GTConnect

To quit GTConnect:

1. Click your name, in the top-right corner of any of the GTConnect windows.



2. Click **Logout**. You are then returned to the **Welcome** page.

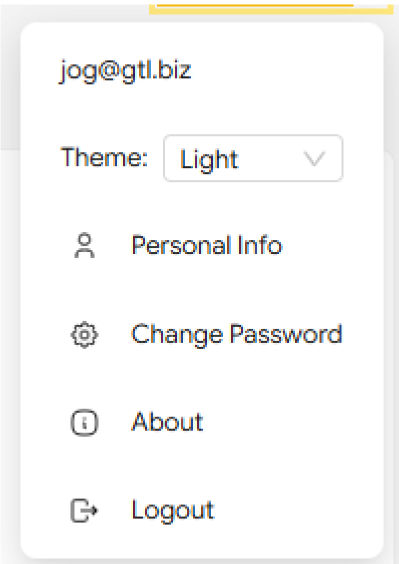
Managing your user profile

When you first login to GTConnect or if your personal details change, you might want to review the personal data which has been entered and modify, if required.

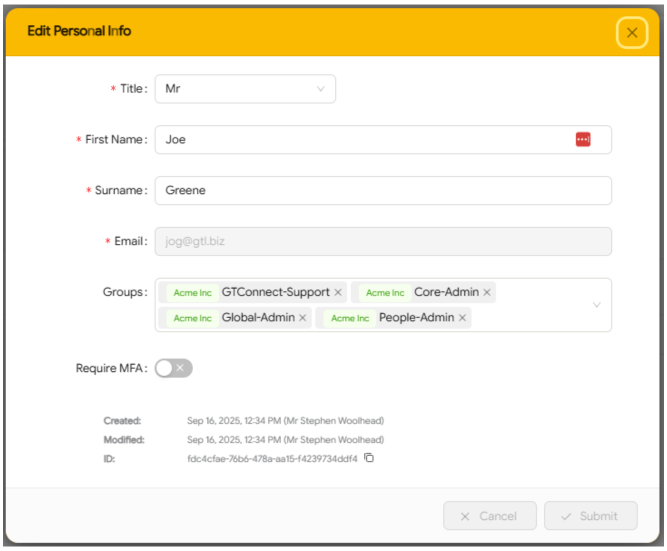
Viewing/Editing Your Personal Info

Use the **Edit Personal Info** dialog box to enter and/or update your personal details.

1. Click your name, in the top-right corner of any of the GTConnect windows.



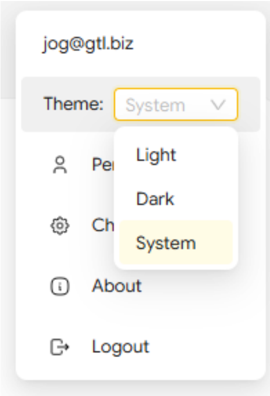
2. Click Personal info.



3. Enter the following information:
    - **Title:** Use the list box to select your title.
    - **First name:** Enter your first name.
    - **Surname:** Enter your family name.
    - **Email:** Enter your email address (you will not be able to edit your email without the help of GT support)
    - **Groups:** When you have been assigned to at least one group, it is displayed in the box. We recommend using groups to manage the system.
4. Click **Submit** to commit the modifications or click **Close** to abandon your modifications.

Dark Mode

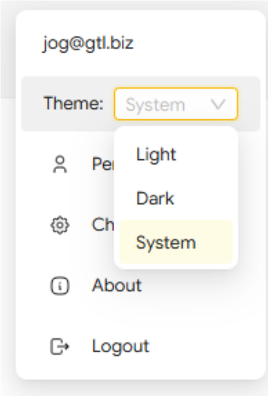
Additionally, you can select themes between light, dark & system (will match your system preferences) by clicking your name and then selecting from the 'Theme' dropdown.



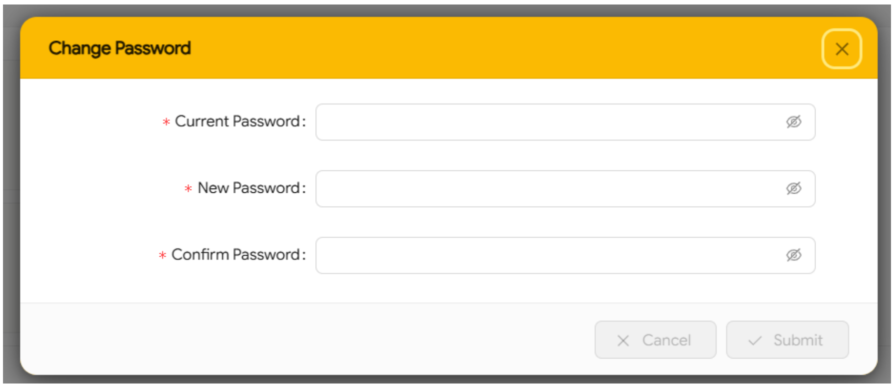
Changing Your Password

To change your password:

1. Click your name in the top-right corner of any of the GTConnect windows.



2. Click Change password.



We recommend the new password:

- Comprises a combination of upper and lower case characters.
- Contains special characters.
- Contains at least one number.

3. Enter the following information:
    - In the **Current password** box, enter the password you logged in with.
    - In the **New** password box, enter the password you want to use.
    - In the **Confirm** password box, re-enter the new password.

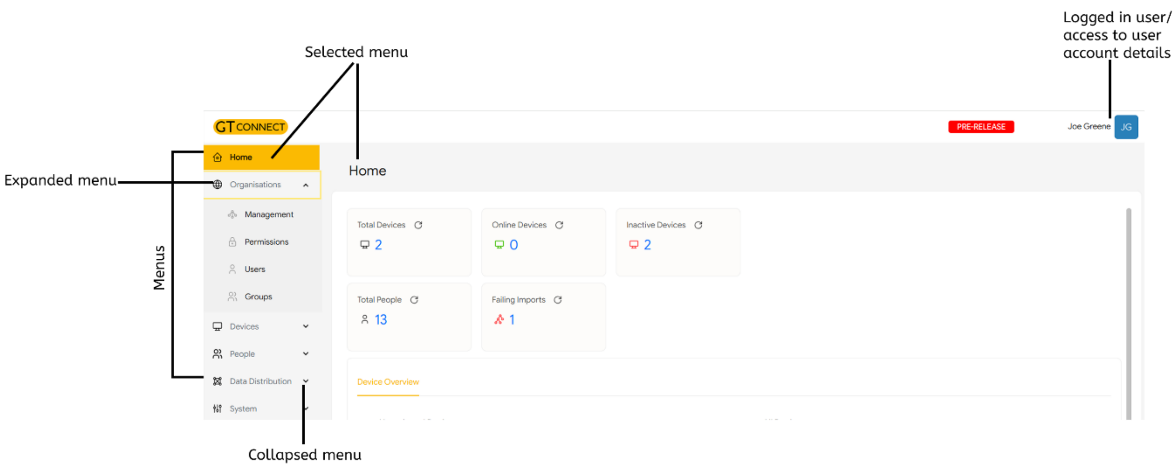
If the password is valid, a green tick is displayed: however, error messages are displayed if the password does not adhere to the rules or is deemed too weak.

4. Click **Submit** to commit the password modification. Alternatively, click **Cancel** to abandon the password modification.

Using windows in GTConnect

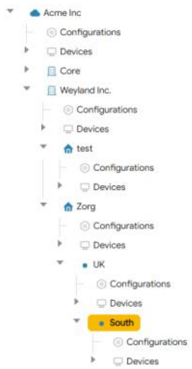
When you have successfully logged in to GTConnect, the **Home** page is displayed. The menus and information displayed is affected by your user privileges: for more information, see “Who this Guide is for” on page 10.

Note: the images used in this User Guide are displayed in UK English as the text is specific to the region configured within your settings.



- **Menus**. Provide access to GTConnect. To view/expand a menu, click the menu name: for example: **People**. All available options which relate to the menu selection are displayed.
- **Selected menu**. When a menu or menu option is selected it is displayed in yellow.
- **Expanded menu**. An upward facing arrow denotes that all the menu options are displayed
- **Collapsed menu**. A downward facing arrow denotes that menu options are hidden.
- **Selected page**. when a menu option is selected
- **Logged in user/access to user account details**. Displays the name of the user currently logged in to GTConnect. To manage personal information, change your password or log out of GTConnect, click your user name.

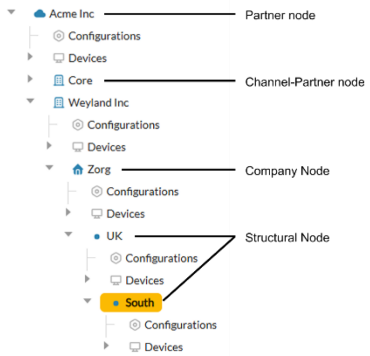
Organisation hierarchy



The Organisation hierarchy is displayed on multiple pages in GTConnect. The data and page view reflects where in the hierarchy you have selected. In the example below, a Structural node has been selected

Nodes

A node is an item which can be selected within the Organisation hierarchy, from a Partner to a Company. The top level in the hierarchy is the Partner node. When updates are made to a Partner they are automatically inherited by child nodes: that is, Channel-Partners and Companies.



Synthetic nodes

There are three types of synthetic node which can be added to a Partner, Channel-Partner or Company:

- **Device**. These are automatically created by GTConnect.
- **Configuration**. These are automatically created by GTConnect. For more information, see "Managing Configurations" on page 59
- **Forwarders**. These are usually created automatically, where transaction forwarding is in use. However, they can be created manually: for more information, see "Transaction " on page 87.

Chapter 3: GTConnect Key User Tasks

Introduction

This chapter describes the key areas of GTConnect, which need careful planning, setup and usage. The areas typically include:

- **Before you begin**. Careful consideration should be given to how the Organisation hierarchy is set up: for more information, see "Setting Up Organisation " on page 18.
- **Setting up the system**. This area largely focuses on device management and managing employees.
- **System diagnostics**. Includes how to resolve any issues which have arisen.

Setting Up Organisation Hierarchy

One of the many benefits of using GTConnect is its flexibility. At the core of GTConnect is the Organisation hierarchy, which provides a structural way to manage how your organisation is displayed and referenced.

Before you begin to use and setup GTConnect we recommend you allocate some time to define this structure as it will save you time in the long run.

Questions to Consider

The structure is for you to define, to suit your organisational needs: however, to get the correct structure you might want to consider questions such as the following: Should the structure be set up as operational divisions, geographic locations or based on types of employees that may be using these devices.

- The hierarchy comprises the following nodes: Partners, Channel-Partners and Companies, with Structural nodes organising the Channel-Partner and Company nodes. For more information on node types, see "Chapter 4: Managing Organisations" on page 21 and Managing Channel-Partners and Companies node on page 22.

The way to consider each of the individual organisational nodes is to think about what you want your staff to do, who will look after what or who should not be able to perform what tasks or see specific data.

- What access rights/permissions do you want to give and to which level?
- Do you want to use System-Groups to collate multiple System-Users? These can be created at Partner, Channel-Partner and Company levels.
- How will the Groups be referenced to maintain consistency?

For information on how your set up the organisational hierarchy, see:

- “Managing Organisations” on page 21
    - Managing Channel-Partners and Companies node on page 22.

“Managing Permissions” on page 27

- Assigning Roles to Groups and Users” on page 30.
- “Modifying Roles” on page 30.
- “Deleting User/Group roles” on page 30.

- “Managing Users” on page 31.
  - “Creating Users” on page 31.
  - “Modifying Users” on page 33.
  - “Deleting Users” on page 34.
- “Managing Groups” on page 34.
  - “Creating Groups” on page 34.
  - “Modifying Groups” on page 35.
  - “Deleting Groups” on page 35.

Provisioning Devices

When the Organisation hierarchy has been defined and implemented the next decisions concern your organisation’s devices, in terms of ‘who has what’, device branding, consent and so on:

Questions to Consider

- Device allocation
  - Who has what device? See “Distributing/Allocating” on page 50.
  - What software and firmware will be used on the devices? See “Managing Applications & Firmware” on page 55.
- How are the devices to be configured
  - Do you want to assign specific buttons? See “Uploading Assets” on page 58.
  - Do you want to assign specific backgrounds & branding options? See “Uploading Assets” on page 58.
  - What distribution groups does the device belong to? See “Chapter 7: Data Distribution” on page 87.
- Diagnosing issues:
  - Using Interactive view to connect to a device? See Interactive View on page 112?
  - Looking back through historic logs? See Historic Logs on page 108?

Chapter 4: Managing Organisations

Organisations

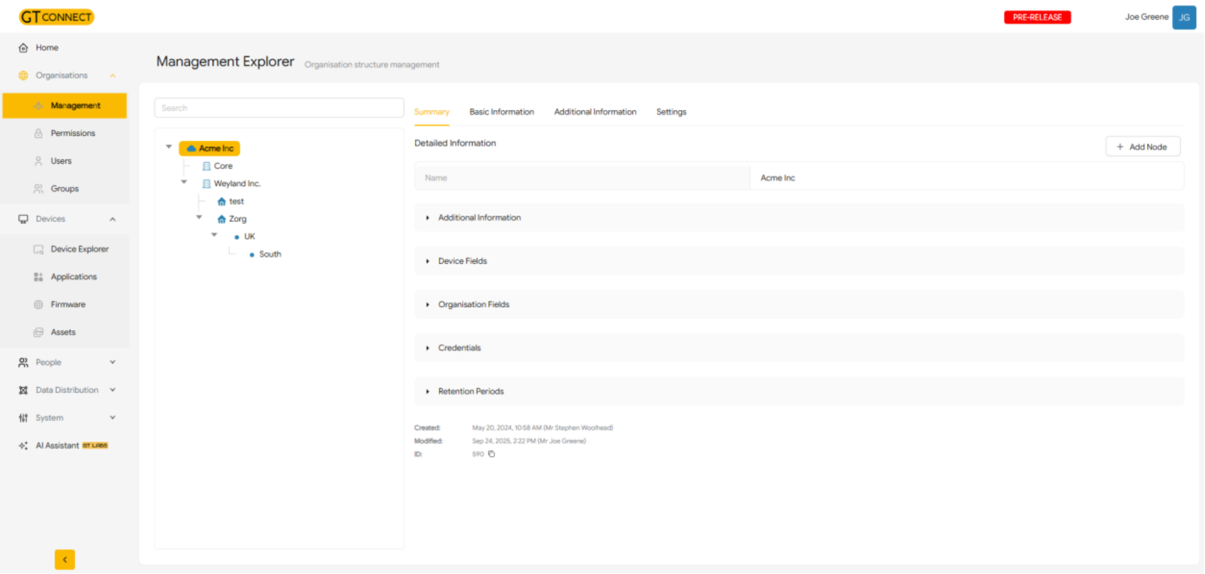
This Chapter describes how to manage all the functionality available from the **Organisations** menu. It includes:

- "Managing Organisations" on page 21.
- "Managing Permissions" on page 27.

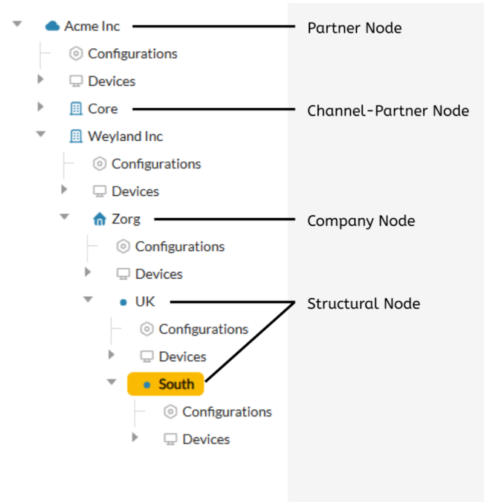
Managing Organisations

You will manage your Organisation hierarchy by building the structure to allow you to manage your devices, data and Customers. GTConnect provides a more adaptable and flexible approach to the organisation's structure, especially if you are familiar with Custom Exchanges capabilities.

When you click the **Management** menu, the **Management Explorer** page is displayed, which displays the **Partner**, Channel-Partner and Company hierarchy.



This page allows you to navigate and manage all aspects of the hierarchy. Each item in the hierarchy is referred to as a **node**.



GTConnect allows you to have a flexible hierarchy which comprises of a Partner, Channel-Partners, Companies and Structural Nodes. Where a Partner has a direct relationship with a Company, the Company can be created directly beneath the Partner.

Subsequently, Channel-Partners can be created and grouped with their associated Companies.

You can use Structural nodes to organise data in terms of geographical location or operational structures, for example.

Managing Channel-Partners and Companies node

Nodes are a generic term used to describe elements in the Organisation hierarchy. Nodes can be quickly identified by the icon displayed next to the node's name.

Node icon	Node type
	Partner
	Channel-Partner
	Company
	Structural

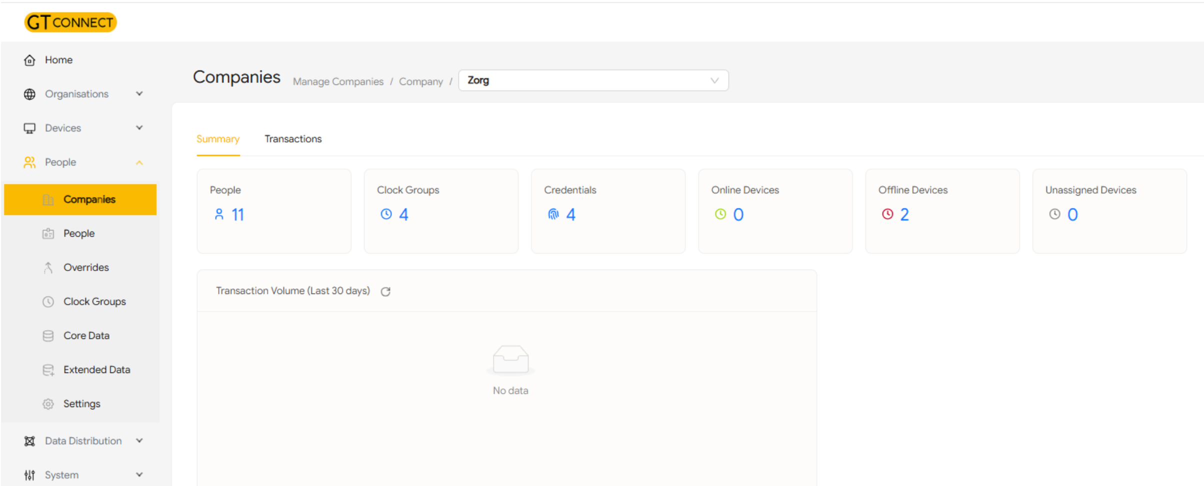
You can create or modify & delete nodes as and when required.

When devices which have been allocated are no longer required, they can be unassigned back to the company node or decommissioned back to the partner node. When unassigning or decommissioning a device, it will delete all data all organisational data that is stored, as it is no longer connected to the Company node and therefore does not have the required permission to use that data.

Viewing Company Dashboards

GTConnect provides company level dashboards as a summary of people, clock groups, credentials, devices as well as a tab showing all company credentials.

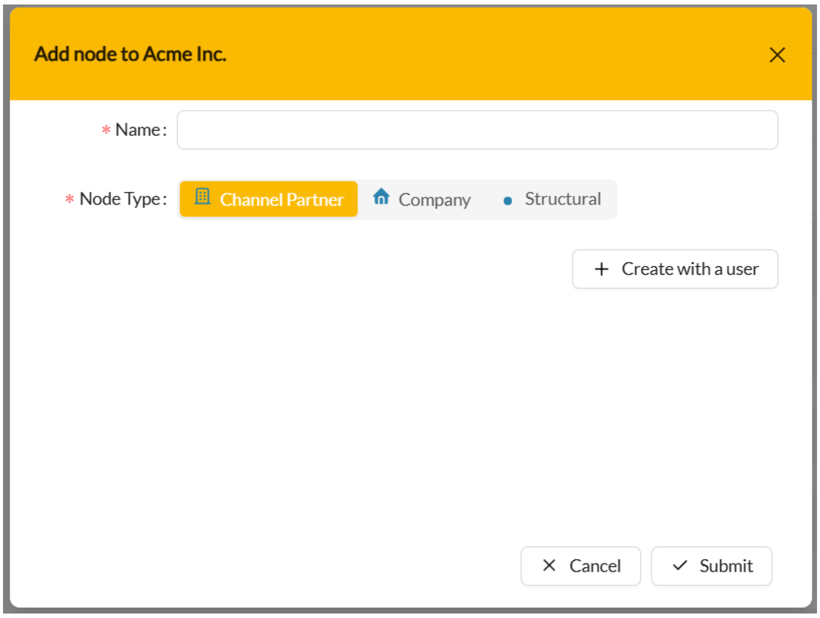
To view these dashboards select People and then companies on the sidebar. Once you are viewing a dashboard, you can select different companies by clicking the current company name and selecting the desired one from the list shown.



Creating Nodes

To create a Channel-Partner, Company and/or Structural node, do the following:

1. Ensure that you have the “organisation.admin” or “organisation.edit” permission
2. Select the **Organisations** menu and click **Management**.
3. On the **Management Explorer** page, use the hierarchy to select the parent of where the Channel-Partner/Company or Structural nodes needs to be inserted, that is, the new node will be inserted underneath the current selection.
4. On the **Summary** tab, click **Add Node**.



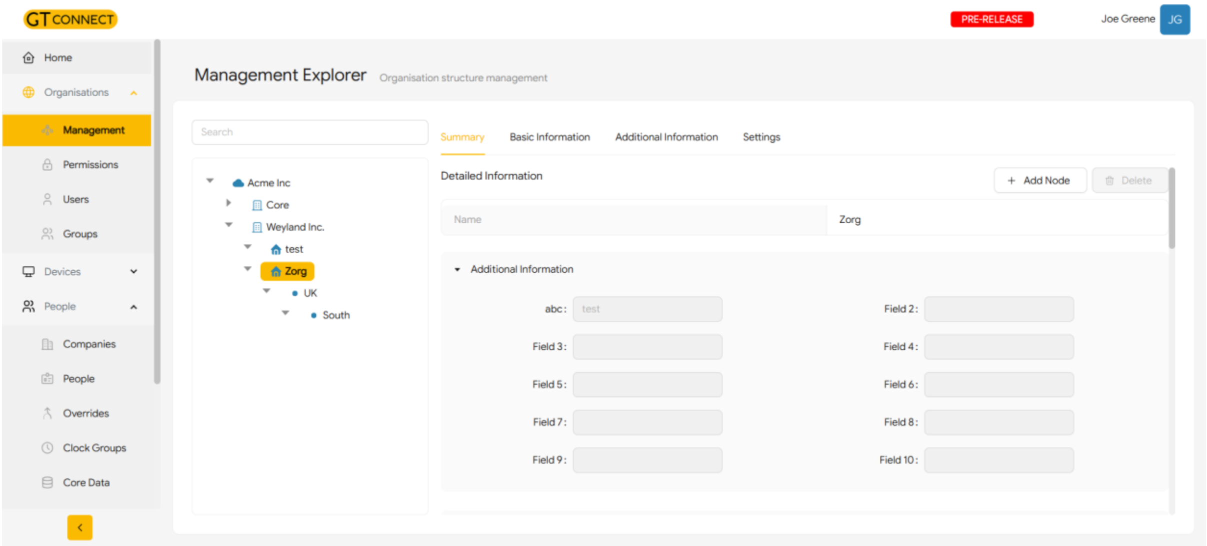
5. In the **Name** box, enter the name of the Channel-Partner, Company or Structural node.
6. In the **Node Type** list box, select the required type. **Note**: the options available depend on which node type you selected in the Organisations hierarchy:
    - **Partner** selected, available options are:
    - Channel-Partner.
    - Company.
    - Structural.
    - Channel-Partner selected, options are.
    - Company.
    - Structural.
    - **Company** selected, available option is:
    - Structural.
7. Click Submit to commit the node or click Cancel to abandon the process.

Modifying Nodes

When a node is created, you may want to modify it to suit your needs or change this data later.

To modify a node, do the following:

1. Ensure that you have the “organisation.admin” or “organisation.edit” permission
2. Select the **Organisations** menu and click **Management**
3. On the **Management Explorer** page, use the hierarchy to select the node you want to modify.
4. The following tabs are now shown to you: Summary, Basic Information, Additional Information, Settings. You can change the data for any of these tabs (other than summary), and click on **Submit** to save your changes or **Cancel** to revert to the last saved version. Note: You must submit changes from each tab individually



- Summary: This shows a read-only version of all of the data on the other tabs
- Basic Information: This tab allows you to edit the name of the node, as well as add/modify the Business Domain (if it is a Partner, Channel-Partner or Company node). Additionally, this is where you add a child node to an existing node; and you can delete the node you have selected from here.
- Additional Information: This tab allows you to provide additional field values.
- These fields allow you to set more meaningful labels for additional items when you view devices in the user interface. Note: any descriptions which are added are inherited by parent nodes, but can be modified in child nodes. At the Partner, Channel-Partner or Company level, these nodes can be set to be secure by clicking the padlock, meaning that the values are not visible to GTConnect Users. You can then click on the “x” button to reset the values. Once changes are made, you must click on “submit” to save your changes.
- Settings: This tab allows you to provide Device Fields, Organisational Fields & set the Transaction Retention & Person Tombstone Retention.

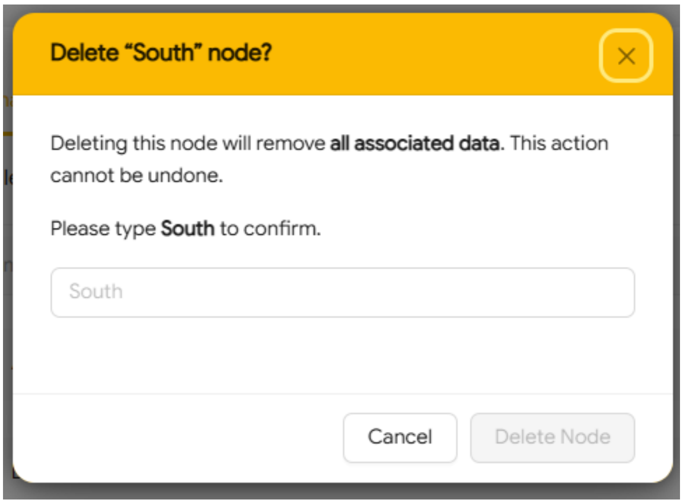
- The Device & Organisational fields let you set labels for the device & organisational fields for each device. Note: any descriptions which are added are inherited by parent nodes, but can be modified in child nodes.
- Additionally, the Transaction Retention Period & Tombstoning period can be set in days.
- The Transaction retention period is how long (in days) the transaction data is stored on the platform before it is deleted. Note: these settings do not affect what data is stored on the devices. Note: any descriptions which are added are inherited by parent nodes but can be modified in child nodes.
- The Tombstone retention period is how long (in days), how long biometric data, and external id will be held on a deleted record (name will be deleted permanently), so that the data can be restored.

5. Click **Submit** to update your data for the node or click **Cancel** to abandon the process.

Deleting Nodes

When a node requires deletion, you can do this through the following process:

1. Ensure that you have the "organisation.admin" permission.
2. On the **Management Explorer** page, use the hierarchy to select the node you want to delete.
3. Select "Delete" from the "Summary" tab.
4. Select "Yes" from the "Are you sure you want to delete this node?", you should now be presented with a pop-up.



5. Follow on-screen instructions and type the name of the node (case sensitive) to confirm.
6. Select "Delete Node". Note: Deleting the node removes all associated data permanently.

Managing Permissions

The Permissions functionality allows you to create a management structure and apply roles to individuals to control what system functionality they have access to. The node selection in the **Organisations** hierarchy determines how values are inherited: for example, from Partners down to Channel-Partner's Companies.

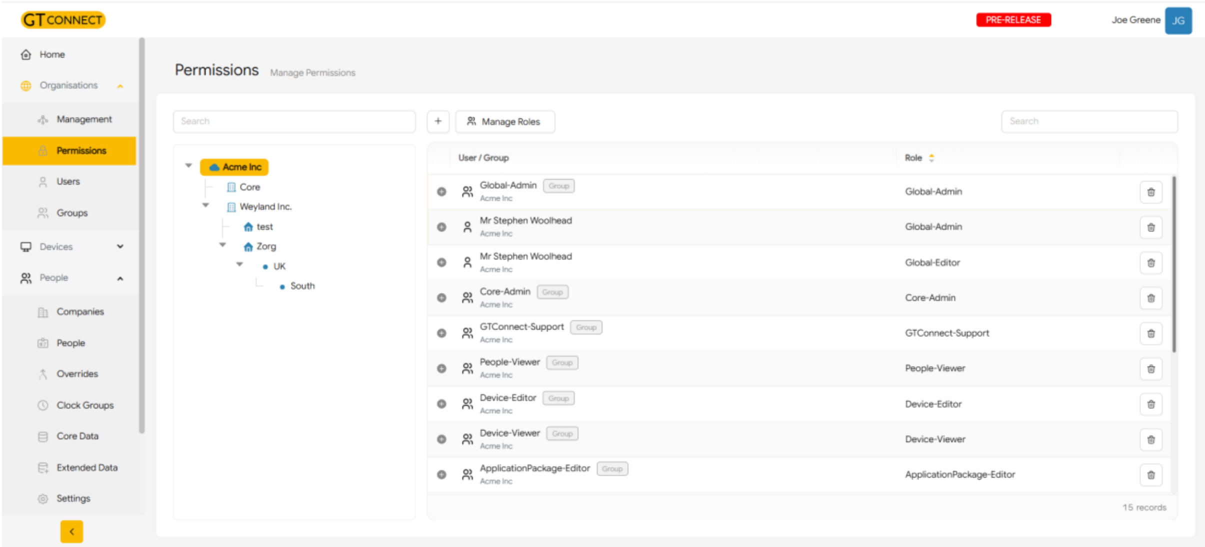
Roles

A set of pre-defined roles are automatically populated within GTConnect and essentially define what functionality users have access to.

	Role name and functionality capabilities							
	Global-Admin	Global-Editor	Global-Viewer	Core-Admin	People-Viewer	Device-Admin	Device-Editor	Device-Viewer
Functionality								
Application								
Create operations on Applications, Firmware and Assets	✓	✓						
View operations on Applications, Firmware and Assets	✓	✓	✓					
Update operations on Applications, Firmware and Assets	✓	✓						
Delete operations on Applications, Firmware and Assets	✓							
Devices								
Administration of Devices for allocation, configuration and assignment	✓							
Editor capability of Devices for allocation, configuration and assignment		✓					✓	
View devices allocation, configuration and assignment			✓			✓		✓
Forwarder								
Create Forwarders and Forwarder filters	✓	✓						
View Forwarders and Forwarder filters	✓	✓	✓					
Update operations on Forwarders and Forwarder filters	✓	✓						
Delete operations on Forwarders and Forwarder filters	✓							
Data Distribution								
Administration of Forwarders, Server-Actions and Direct Data Distribution	✓							
Editor capability for Forwarders, Server-Actions and Direct Data Distribution	✓	✓						
View Forwarders, Server- Actions and Direct Data Distribution			✓					
Metadata								
Allows use and control of metadata	✓			✓				
Edit metadata		✓						
View metadata			✓			✓		✓
Organisation								
Administration of Organisational control of elements such as Nodes, Users Groups & Permissions	✓			✓				
Editor capability of Organisational control of elements such as Nodes, Users Groups & Permissions		✓						
View Organisation elements such as Nodes, Users, Groups & Permissions			✓			✓		✓
People								
Administration for People	✓							
Management/distribution of their secure data	✓							
View People and the distribution of their secure data			✓					
Platform								
Administration of Partner management functions	✓			✓				
View Partner management functions			✓					
Permissions								
permissions.device.command.boostlog						✓	✓	✓
permissions.device.command.reboot							✓	
permissions.device.command.restart							✓	
permissions.device.support.historiclogs						✓	✓	✓
permissions.device.support.livelogs						✓	✓	✓
permissions.device.support.metrics						✓		✓
permissions.device.support.uploads						✓		✓

As a Partner you are able to manage roles for all Channel-Partners, Companies and Structural nodes. **Note**: system modifications are audited.

To display the **Permissions** page, select the **Organisations** menu and click **Permissions**.



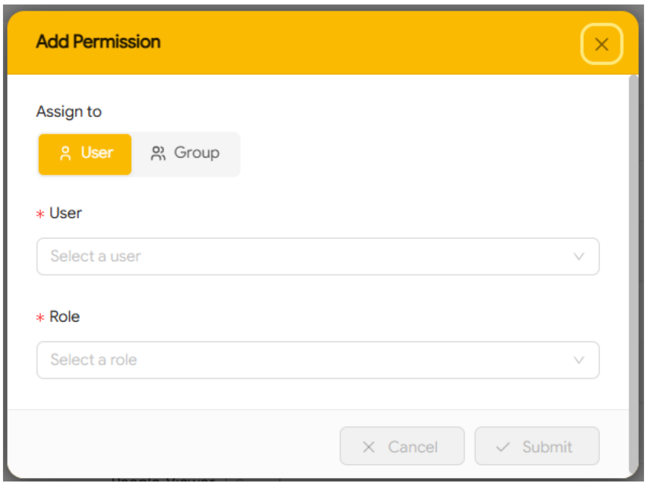
To view permissions assigned to a node, select the required node: for example, **Acme Inc** and the page refreshes to display all the roles, users, groups which have been assigned.

To display details about a role, click + to expand the view. All the role types assigned to the permission along with a description are displayed. When you have finished, click − to hide role details.

Assigning Roles to Groups and Users

Roles can be applied to users/groups. To apply permissions to individual users and groups, do the following:

1. Select the **Organisations** menu and click **Permissions**.
2. On the **Permissions** page, use the hierarchy to select the node you want to add permissions to.
3. Click **Add**.



4. By default, the Permission type is set to User: however, to assign permissions to a Group, click on **User** and select **Group** from the dropdown that will appear. If the user or group you require is not displayed, it is because they have not been set up. For more information, see:
    - "Creating Users" on page 31.
    - "Creating Groups" on page 34.
5. In the **Role** list box, select the required permission: for example, **Core-Admin**.
6. Click **Submit** to commit the Permission or click **Close** to abandon the process.

Modifying Roles

Roles can be modified through the following process:

1. Select the **Organisations** menu and click **Permissions**.
2. On the **Permissions** page, use the hierarchy to select the node you want to modify a role from.
3. Select the Manage Roles button ⚙ on the relevant user/group
4. Either Press the "Add" button, and submit a Role name, or select the relevant custom role
5. Select from the "Available Permissions" list any that you would like to add and then click on the '>' button
6. Select from the "Selected Permissions" list any that you would like to remove and then click on the '<' button

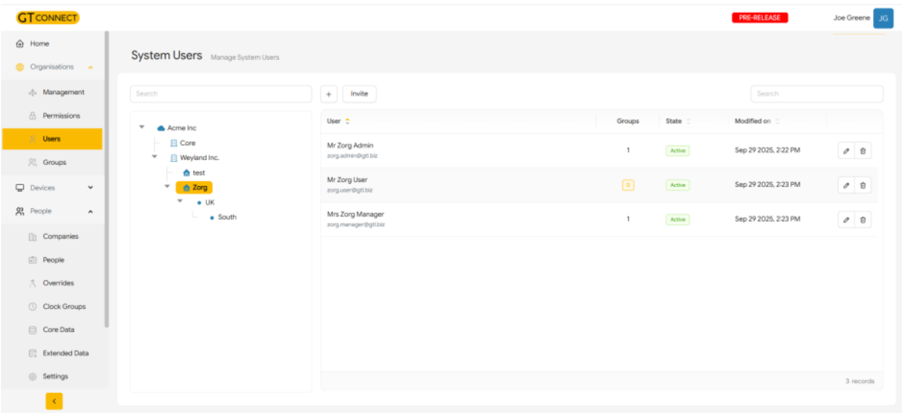
Deleting User/Group roles

To delete Permissions, do the following:

1. Select the Organisations menu and click Permissions.
2. On the Permissions page, use the Organisations hierarchy to select the node you want to remove the permissions from.
3. Locate the Permission you want to remove and click Delete.
4. On the confirmation dialog box, click Yes to continue the deletion or click No to abandon the deletion.

Managing Users

To keep GTConnect as usable and compliant as possible, you should Create Users for each person who is to have access to GTConnect. To view Users which have been created, select the **Organisations** menu and click **Users**. On the **System Users** page, use the **Organisations** hierarchy to select a node.



The **System Users** page displays the following information:

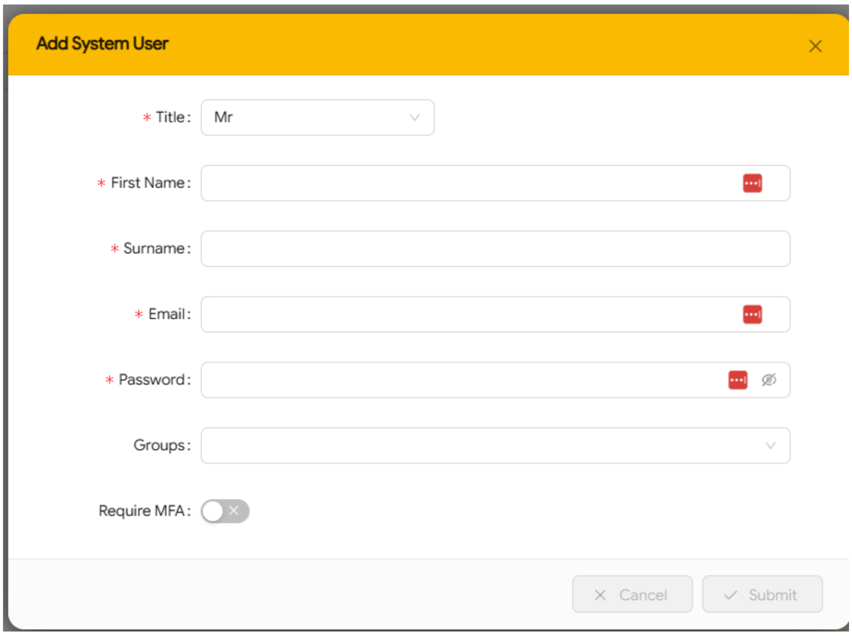
- **User**. Displays the User's name and email. By default, Usernames are displayed in alphabetical order
- **Groups**. Displays how many Groups the User belongs to. If the User hasn't been assigned to any Groups.
- **State**. The following states are displayed:
  - **Active**. The User logs in to GTConnect.
  - **Invited**. The User has been setup, but they have not yet logged in to GTConnect.
- **Last Modified on**. Displays when modifications were last made to the User's account.

Note: the columns can be used to sort by, clicking .

Creating Users

Use the **Organisations** hierarchy to select where the User is to be assigned. To create Users, do the following:

1. Select the **Organisations** menu and click **Users**.
2. On the **System Users** page, use the **Organisations** hierarchy to select the node you want to assign the User to.
3. Click **+**.
4. Select "Add New User" assuming the user has not been registered on another GTConnect Tenant (otherwise select Add Existing User)



5. Enter the following information:

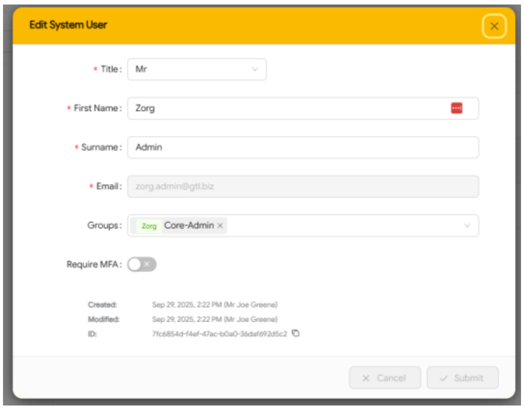
- **Title**. Use the list box to select the required title.
- **Firstname**. Enter the User's first name.
- **Surname**. Enter the User's family name.
- **Email**. Enter the User's email address.
- **Password**. Enter the password the User needs in order to be able to login to GTConnect.
- **Require MFA**. Tick this modal, if you wish to require MFA.
    - Supported Authenticator apps include: Authy, Google authenticator, Auth0 guardian, Microsoft Authenticator

6. Click **Submit** to commit the User or click **Cancel** to abandon the process.

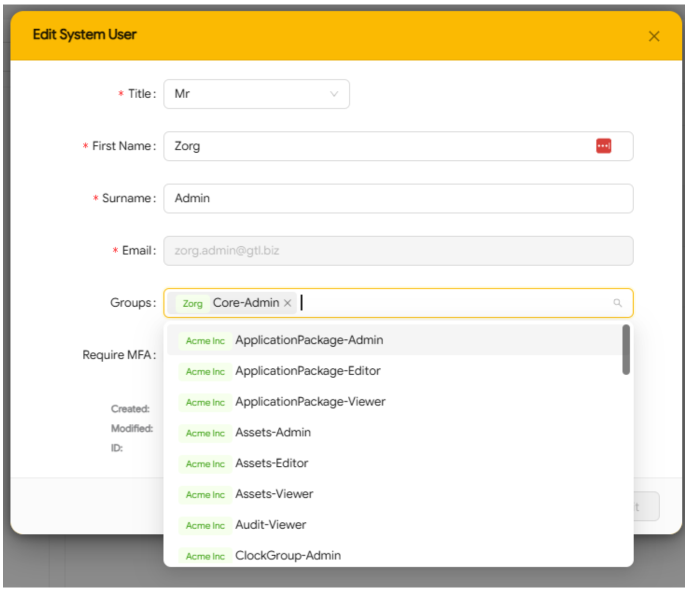
Modifying Users

If you need to modify a User's details and which Groups they belong to, do the following:

1. Select the **Organisations** menu and click **Users**.
2. On the **System Users** page, use the **Organisations** hierarchy to select the node to which the User belongs.
3. Locate the User you want to modify to display the **Edit System User** dialog box or click ✎ **Update**.



4. Modify the User's details as required, to modify which Groups the User belongs to, click the **Groups** box.



5. If the User needs to be included in additional Groups, click-to-select the required Group name. Alternatively, to remove a User from a Group, click the **X** next to the Group's name. It is then automatically removed.
6. Click **Submit** to commit the modifications or click **Close** to abandon the modifications.

Deleting Users

To delete Users, do the following:

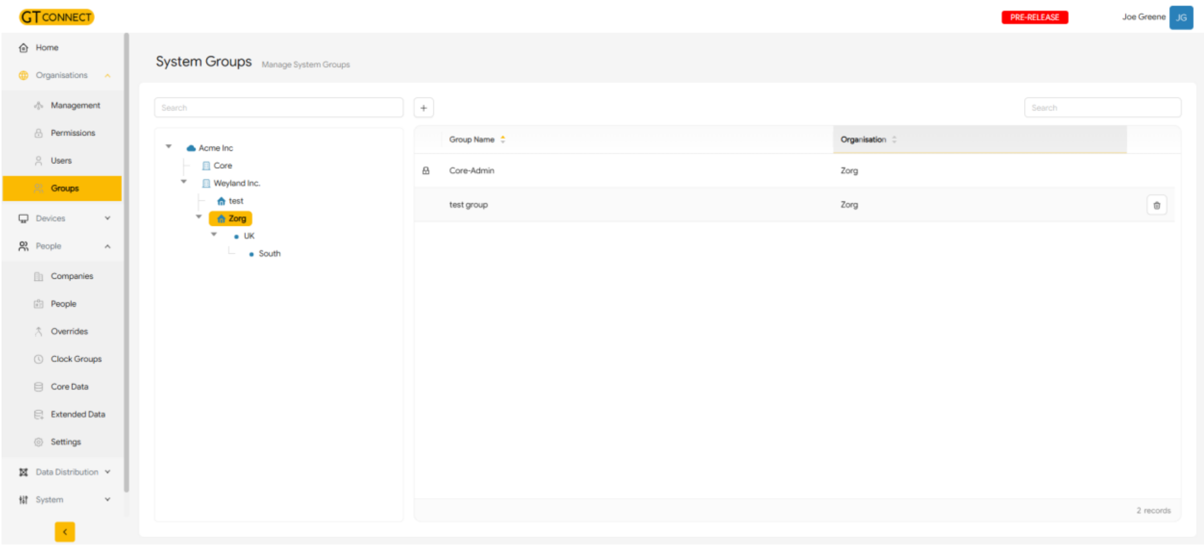
1. Select the **Organisations** menu and click **Users**.
2. On the **Users** page, use the **Organisations** hierarchy to select the node to which the User belongs.
3. Locate the User to be deleted and in the row for the User, click **Delete**.
4. On the confirmation dialog box, click **Yes** to continue with the deletion or click **No** to abandon the deletion.

Managing Groups

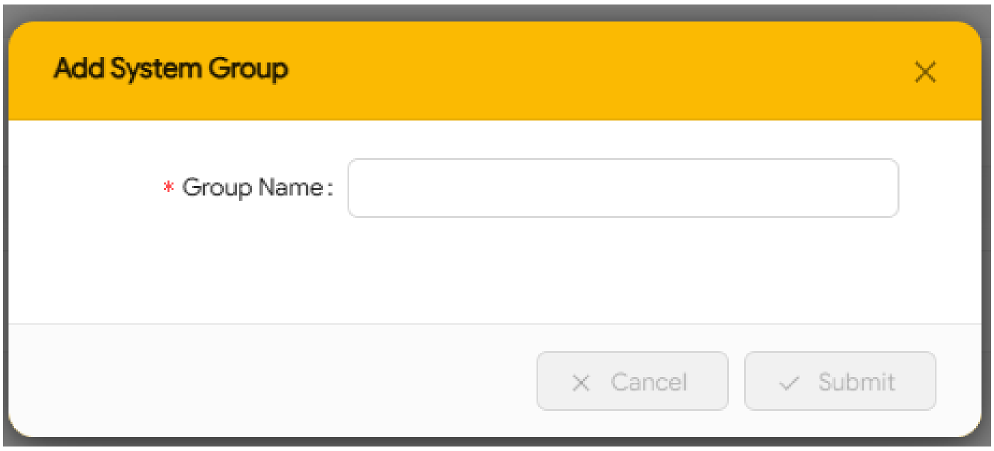
Groups are a collection of Users, which can be created at Partner, Channel-Partner or Company level.

Creating Groups

1. Select the **Organisations** menu and click **Groups**.
2. On the **System Groups** page, use the **Organisations** hierarchy to select the node to which the Group belongs.



3. Click **+**.



4. In the **Group Name** box, enter the name of the Group.
5. Click **Submit** to commit the Group or click **Close** to abandon the creation of the Group.

Modifying Groups

Note: you can only modify user-defined Group names, it is not possible to modify system defined Groups.

1. Select the **Organisations** menu and click **Groups**.
2. On the **System Groups** page, use the **Organisations** hierarchy to select the node to which the Group belongs.
3. In the User-defined Group row, click **Update**.
4. In the **Group Name** box, modify the Group description. The name of the Group is then automatically updated in all instances through-out GTConnect.
5. Click **Submit** to commit the Group or click **Close** to abandon the modification.

Deleting Groups

Note: you can only delete user-defined Group names, it is not possible to delete System defined groups.

1. Select the Organisations menu and click Groups.
2. On the System Groups page, use the Organisations hierarchy to select the node to which the Group belongs.
3. In the User-defined Group row, click Delete.
4. On the confirmation dialog box, click Yes to commit the deletion or click No to abandon the deletion.

Chapter 5: Managing Devices

Devices

This Chapter describes how to manage all the functionality available from the **Devices** menu. It includes:

- "Using the Device Explorer Page" on page 36.
- "Managing Applications & Firmware" on page 55.
- "Managing Assets" on page 57.
- "Setting up a device" on page 69.

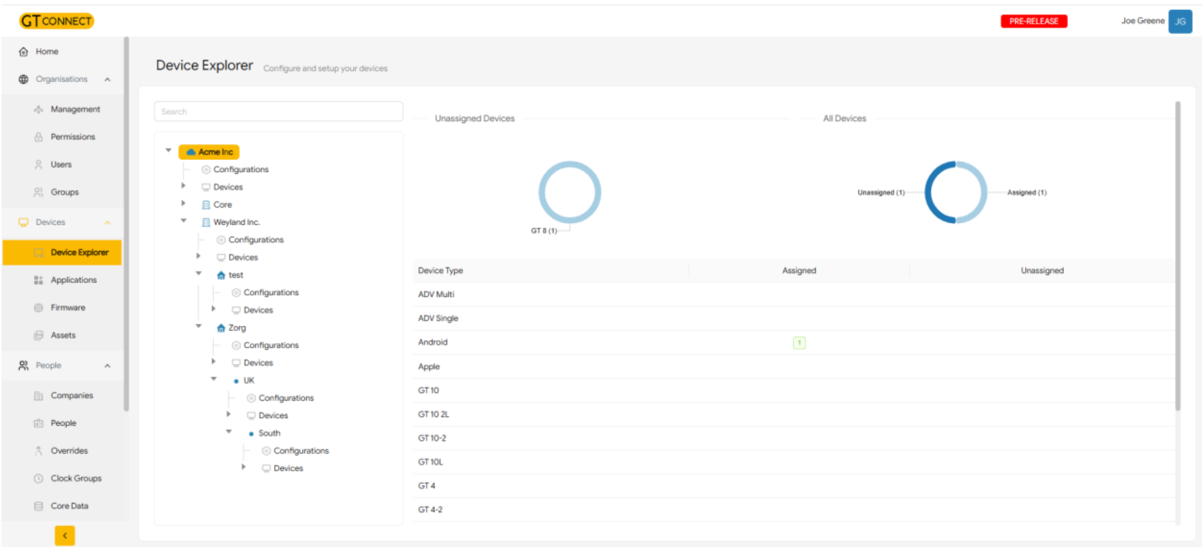
Using the Device Explorer Page

The **Device Explorer** page, when viewed at a Partner level provides a dashboard view, where you view a summary of your devices' details. This shows a pie/doughnut chart of the device type of all the node's unassigned devices, as well as pie/doughnut chart of the distribution of all devices between

- Assigned
- Unassigned
- Invite Sent *
- Invite Expired *

* tablet only

These same charts are also shown at the home screen



To locate a specific device, enter the device's name in the box, located in the right-hand corner of the page or find its position within the device tree. When you view a Device by clicking on it, GTConnect will show the devices' device explorer

Device Explorer comprises of the following tabs:

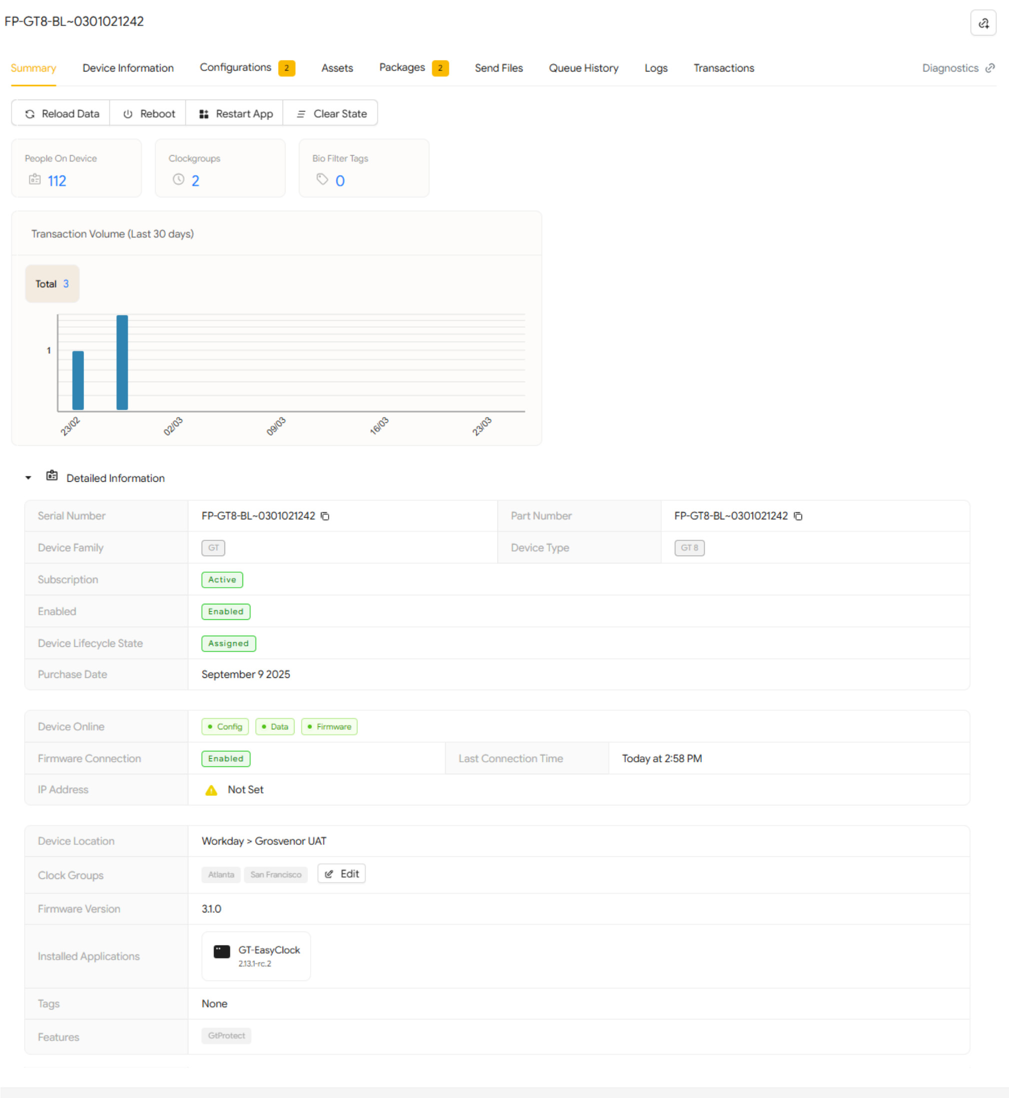
- **Summary** tab, see "Summary " on page 37.
- **Device Information** tab, see "Device Information tab" on page 39.
- **Configurations** tab, see "Configurations tab" on page 41.
- **Assets** tab, see "Assets " on page 45.
- **Packages** tab, see "Packages " on page 45.
- **Send Files** tab, see "Send Files " on page 46.
- **Queue History** tab, see "Queue History " on page 47.
- **Logs** tab, see "Logs " on page 48.
- **Transactions** tab, see "Transactions " on page 49.
- **Diagnostics**, for information on device diagnostics, see "Managing Device Diagnostics" on page 100.

Summary Tab

Use the **Select Device** list box, to select a specific device. The device's name is then displayed at the top of the page.

This tab displays an overview about the selected device. To ensure the device is able to receive updates, and so on, the device must be set to:

- **Enabled**. This sets a property on the terminal instance which allows you to control if you want that terminal to perform its normal functions or not. To set the terminal to **Enabled**, see "Device Explorer - Deploying Devices" on page 49.
- **Assigned**. The terminal needs to be assigned within the Organisation, see Distributing/Allocating" on page 50.
- **Online**. This is a state which displays if the terminal is communicating with the GTConnect platform.



This offers the following actions:

Reload Data: Forces GTConnect to resend all data from the beginning. The clock will refresh all of its database.

Reboot: Powers down the device and restarts immediately

Restart App: Closes the application that the device is running and restarts it

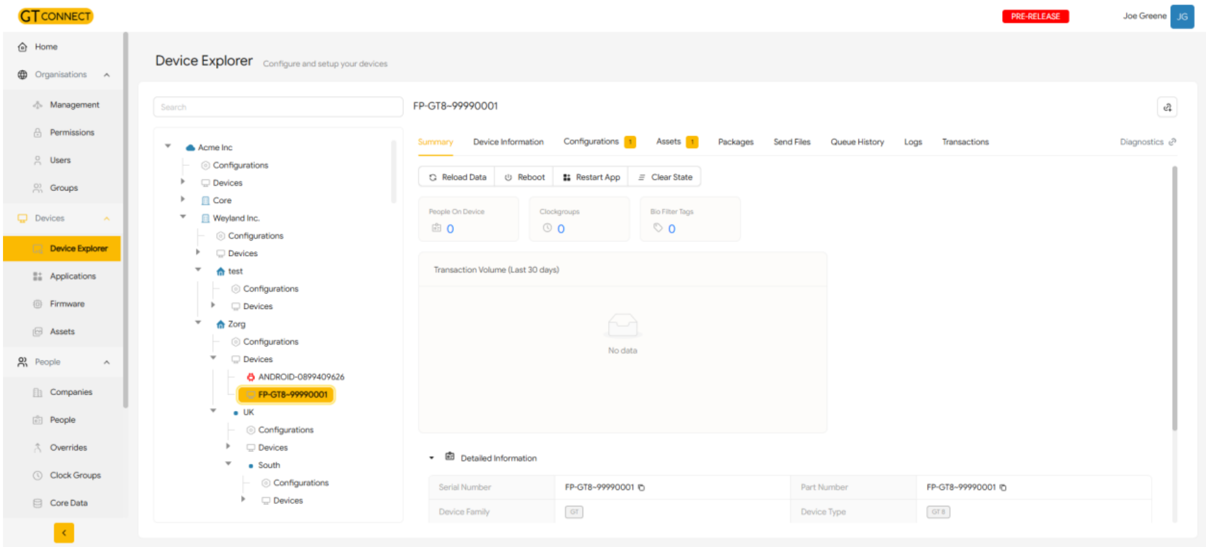
Clear State: Removes all configuration/application/firmware from the device

This screen shows the following data

- **People On Device:** The number of employee records that are on the device
- **Clock Groups:** The number of clock groups that the device is part of
- **Bio Filter Tags:** Bio Filter Tags are a feature that restricts the biometrics from being downloaded, while allowing the employee data to be downloaded.
- **Transaction Volume Graph:** This shows the number of transactions that the clock has sent per/day, including a total value for the last 30 days
- **Serial Number:** This shows the serial number for the device used in GTs ordering system
- **Part Number:** This shows the part number that is stored on GTConnect, often this is the same as the Serial Number
- **Device Family:** What family is the device in (it will show as GT if it is a GT Tablet, GT8 or GT10 & IT if it is a IT11 or GT4)
- **Device Type:** General Model of the device
- **Subscription:** This shows the state of the GTConnect license for the clock
- **Enabled:** Shows whether the device has been set to 'enabled' "Device Explorer - Deploying Devices" on page 49)
- **Device Lifecycle State:** The state of deployment/enablement the device is in
- **Purchase Date:** Shows date of purchase from GT
- **Device Online:** This will show 3 different values, either in green or red for if they are online
    - **Config:** The device is able to receive configuration data
    - **Data:** The device is able to transmit/receive data
    - **Firmware:** The device has a firmware link to GTConnect
- **Firmware Connection:** Shows whether the firmware link between the clock and GTConnect is enabled
- **Last Connection Time:** Shows the date and time of the last communication between GTConnect and the clock
- **IP Address:** IP Address of the Clock
- **Device Location:** Description of the location of the node in the organisational tree
- **Clock Group:** List of which clock groups the clock is part of (for more on clock groups see Managing Clock Groups 76). Additionally, from here, you can click 'Edit' to change which clock groups the device is part of.
- **Firmware Version:** Which Firmware Version is installed on the device
- **Installed Applications:** List of applications, and their versions which are installed on the device
- **Tags:** Tags can be entered on the Device Information tab
- **Features:** Can be used to distinguish devices from each other, by a particular feature, also used to identify if the clock is covered by GTProtect

Device Information tab

Use the **Select Device** list box, to select a specific device. The device's name is then displayed at the top of the page.



From this tab you are able to:

- Enable/De-activate the device.
- Enable/De-activate the device's firmware connection (deactivating firmware connection will tell GTConnect to use fallback protocols for cases where connectivity is a challenge)
- View whether the device is online/offline.
- Enter Customised Field names.
- Enter Credential Filtering values.
- Enter Billing References.
- Enter Security Keys.

To Enable Device or Firmware Connection

To set the status of a device, or the Device's firmware connection, do the following:

From the Device Summary page, click the Device Information tab.

Under the name of the device, slide the selector to toggle for 'Enabled' or 'Firmware Connection Enabled' to the correct value:

- 

Enabled.
- 

Disabled.

Click Submit to commit the modification.

Adding Tags, Fields, Billing References or Security Keys

To add values for any of these, you must expand the correct section by clicking on the "expand" button ▸. Once the section is expanded, you can enter values for any of these attributes as required

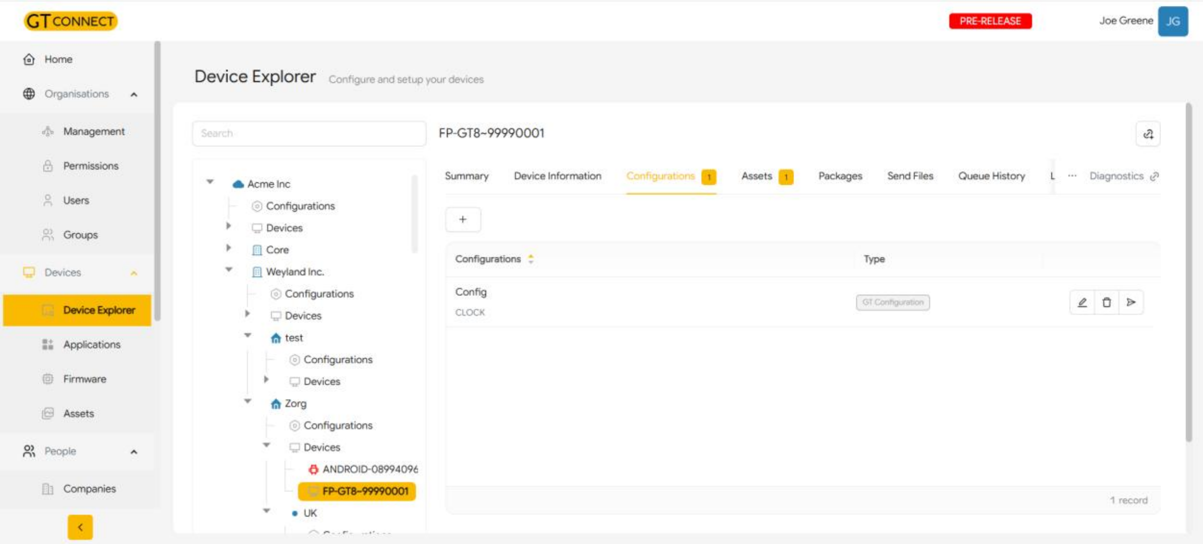
Device Status

A device has online statuses for config, data and firmware. An online status is indicated by the box and dot for each being green. The 3 mean

- **Config:** The device is able to receive configuration data
- **Data:** The device is able to transmit/receive data
- **Firmware:** The device has a firmware link to GTConnect

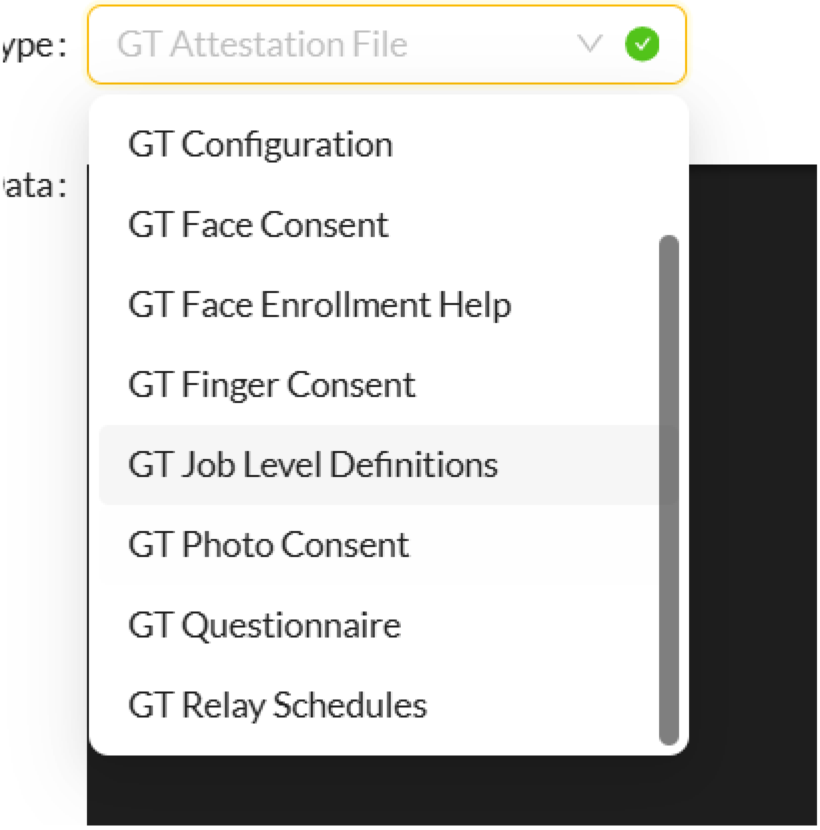
Configurations tab

Use the **Select Device** list box, to select a specific device. The device's description is then displayed at the top of the page.



When the specific device has been selected, you can then add Configurations. For more information on Configurations, see "Managing Configurations" on page 59.

Note: if a number is displayed next to the tab name, it denotes that there is/are X many Configuration files which can be sent to the selected device.



Configuration files/entries can be used to add the following (some may be device dependent)

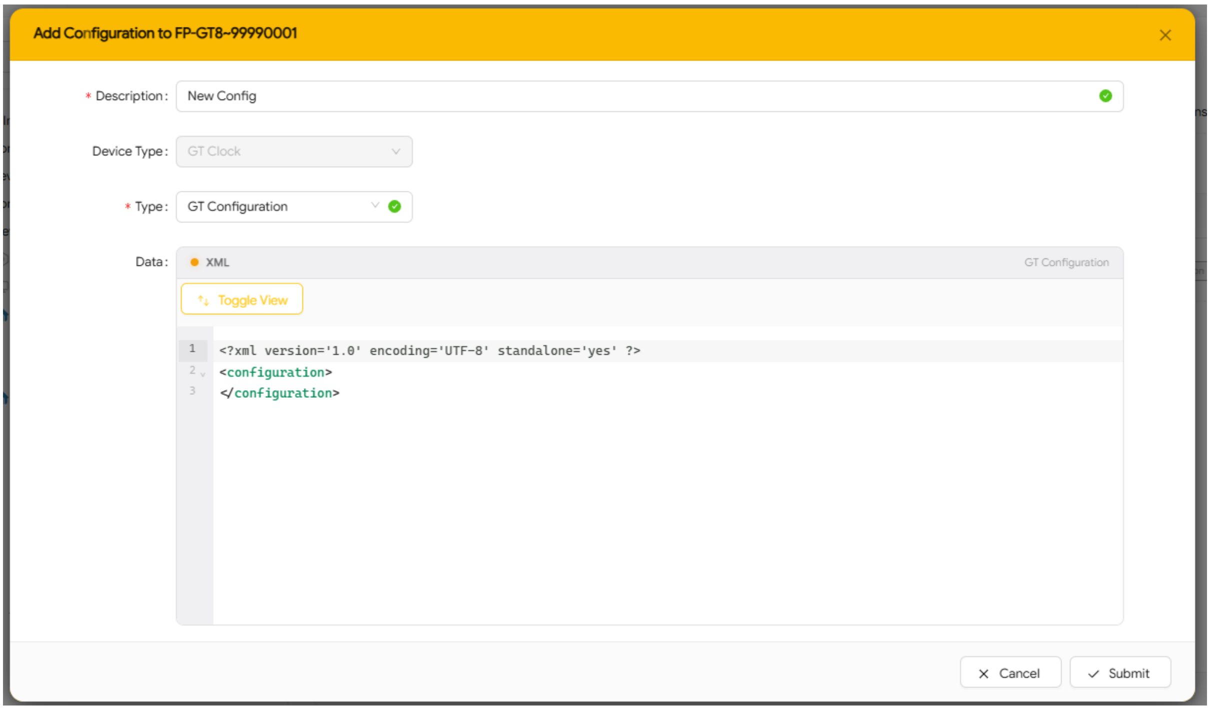
File/Entry Type	Advance Controllers	GT Series Clocks/ GT Tablets	IT Series Clocks
ADV Configuration	✓		
Application Config	✓		
Attestation Files		✓	✓
Boot Config	✓		
Button Definition (definition of UX flow)		✓	✓
Configuration		✓	✓
Face Consent		✓	
Face Enrolment Help		✓	

Finger Consent		✓	✓
Job Level Definitions		✓	✓
Mifare script			✓
Photo Consent		✓	
Questionnaire		✓	
Relay Schedules		✓	✓
Transfer Definitions			

All these types of files can be entered through an XML entry on the page, in addition the Configuration on a GT Series Clock/GT Tablet can also be entered through a table entry, where each value can be entered for Path, Property name and Value individually.

To Create Configurations

1. From the Device Summary page, click the Configurations tab.
2. Click "+ Add" bringing up a configuration window



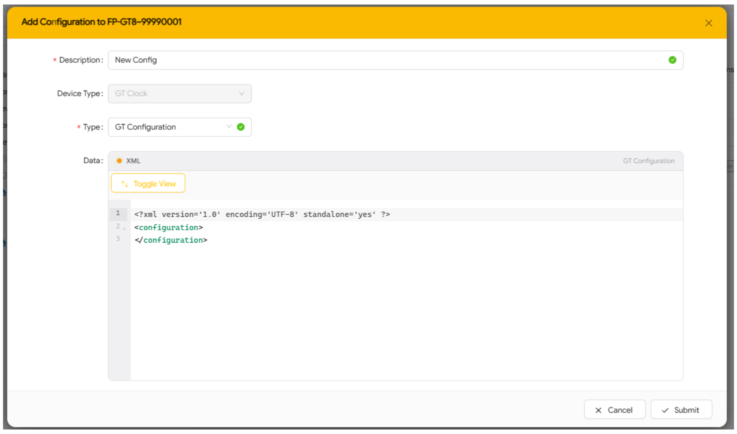
3. Name your Configuration/entry file and select the type of file/entry.
4. Enter XML (or enter values for Configuration table)
5. Click **Submit** to commit the modification or click **Close** to abandon the modification. For more information, see "Adding Configurations" on page 60.

To send Configurations to a Device

1. From the Device Summary page, click the Configurations tab.
2. To send the Configuration to the device, click **Send Now**. The Configuration is then automatically sent to the device.

To Modify/Update Configurations

1. From the Device Summary page, click the Configurations tab.
2. Either click the Configuration or click **Update**.



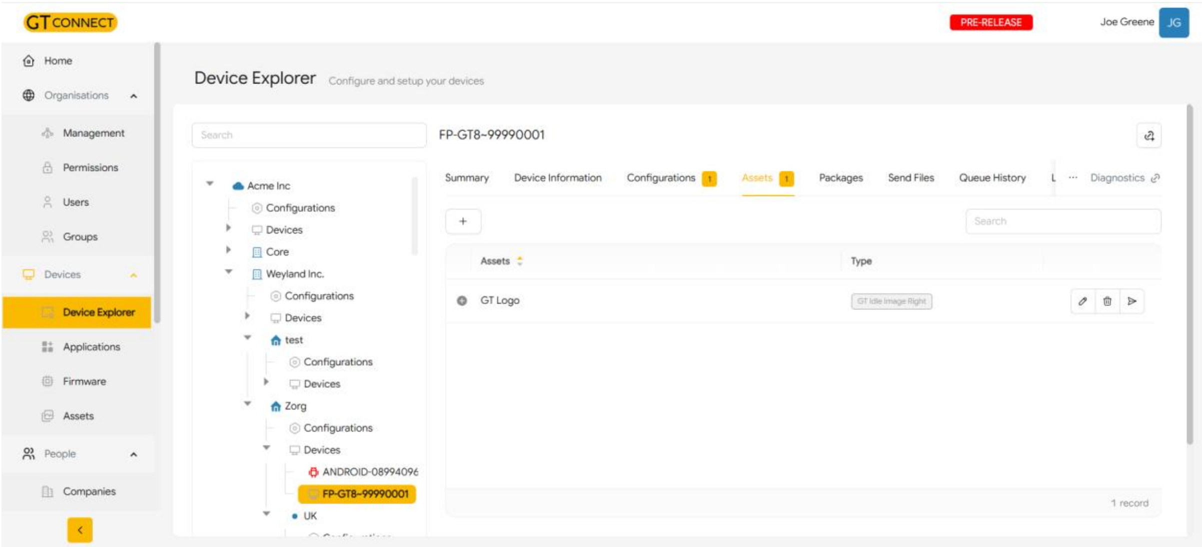
3. Make the required modifications to the Configuration and click **Submit** to commit the modification or click **Close** to abandon the modification. For more information, see “Adding Configurations” on page 60.

To Delete Configurations

1. From the Device Summary page, click the Configurations tab.
2. To delete the Configuration, to ensure it can not be sent to the selected device, click Delete**.**
3. On the confirmation dialog box, click **Yes** to continue with the deletion or click **No** to abandon the deletion.

Assets Tab

Use the **Select Device** list box, to select a specific device. The device's description is then displayed at the top of the page.



Note: if a number is displayed next to the tab name, it denotes that there is/are X many Assets which can be sent to the selected device.

Where an Asset is available to be sent to the device click + to expand the details and view additional information.

For more information on Assets, see "Managing Assets" on page 57.

To Send Assets To a Device

1. From the **Device Summary** page, click the **Assets** tab.
2. Click + to expand the view and display the Asset's details.
3. To send the Asset to the device, click **Send Now**. The Asset is then automatically sent to the device.

To Disconnect Assets From a Device

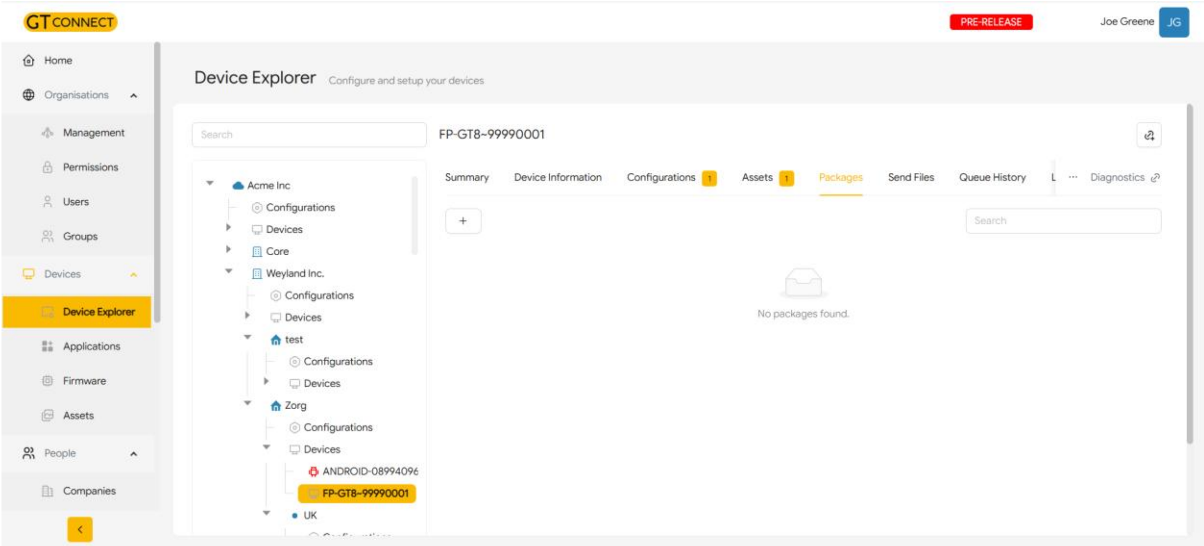
1. From the **Device Summary** page, click the **Assets** tab.
2. To delete the Asset, to ensure it can not be sent to the selected device, click **Delete**.
3. On the confirmation dialog box, click **Yes** to continue with the deletion or click **No** to abandon the deletion.

NOTE: this does not delete it from the device if it has already been sent

Packages Tab

Use the **Select Device** list box, to select a specific device. The device's description is then displayed at the top of the page.

The **Packages** tab displays any Applications and Firmware which are ready to be sent to the device. For more information on how to setup Applications and Firmware, see “Adding Packages” on page 63.



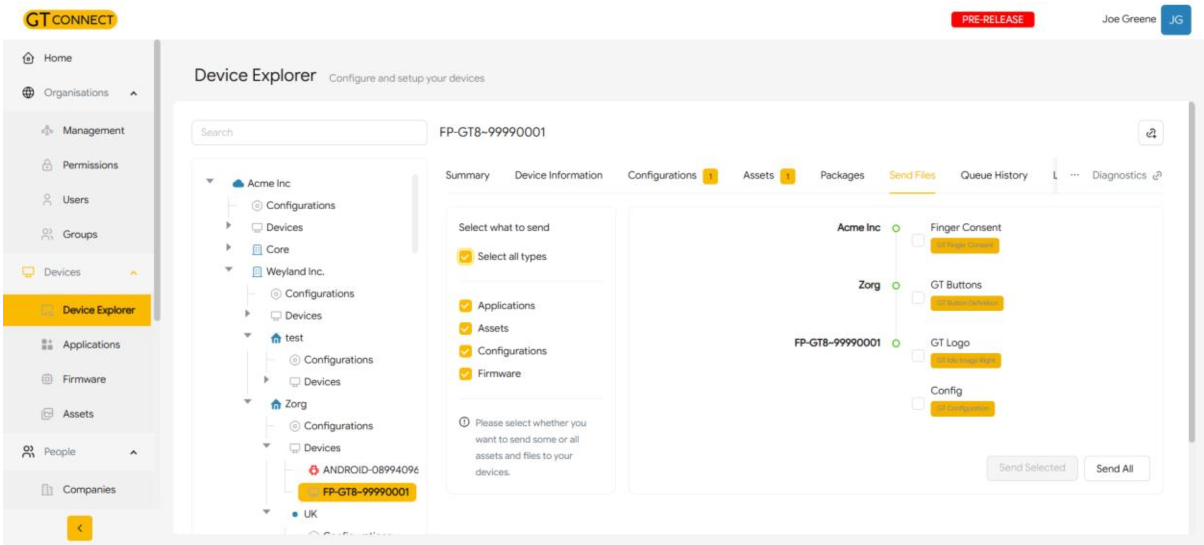
To add a package to a device:

1. On the **Packages** tab, click **Add**.
2. If no Applications/Firmware are available, on the **Add Package** dialog box, click **Go to Applications Explorer**. For more information, see “Managing Applications & Firmware” on page 55.

Send Files Tab

Use the **Select Device** list box, to select a specific device. The device’s description is then displayed at the top of the page.

This tab allows you to view the files that a device can have sent to it. The files can be sent directly to the device or inherited from a node higher in the hierarchy.



If files are available to send to the selected device, do the following:

- **Send All**. Select the check box to view all the available options to send the device.
- **Applications**. Select the check box to view all the available Applications which can be sent to the device.
- **Assets**. Select the check box to view all the available Assets which can be sent to the device.
- **Configurations**. Select the check box to view all the available Configurations which can be sent to the device.
- **Consents**. Select the check box to view all the available Consents which can be sent to the device.
- **Firmwares**. Select the check box to view all the available Firmware which can be sent to the device.

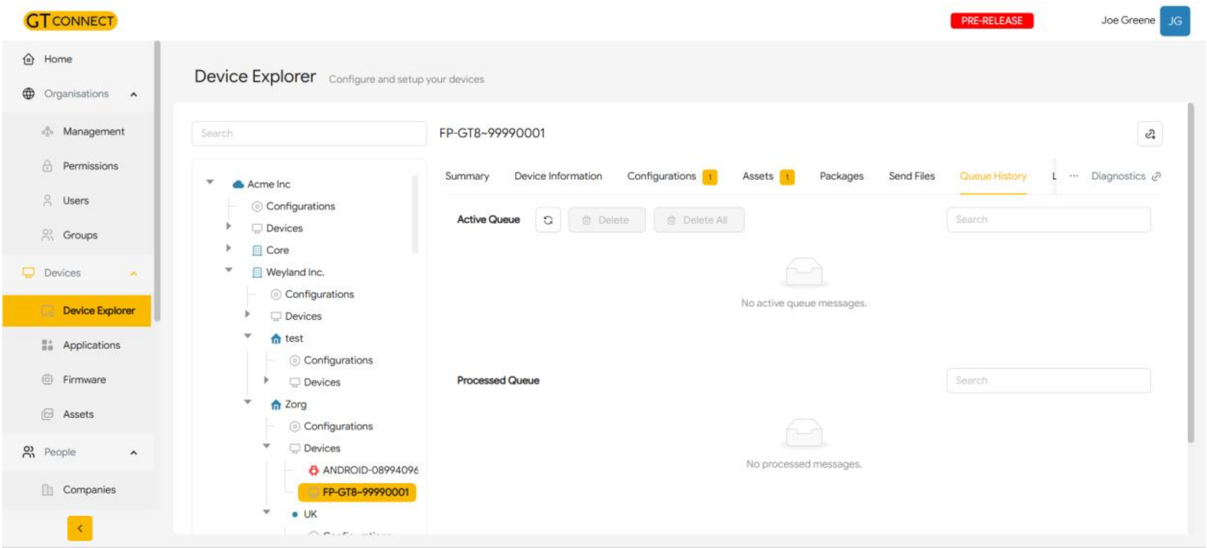
To specify which file(s) are sent to the device, select the required check box(es) and then click either **Send Selected** or **Send All**.

Queue History Tab

Use the **Select Device** list box, to select a specific device. The device's description is then displayed at the top of the page.

This tab displays what Configuration items are currently queued for the selected device and what items have been sent or failed to be sent.

When you add a Configuration item in the hierarchy and send it, the system determines how it is routed to the relevant device(s).

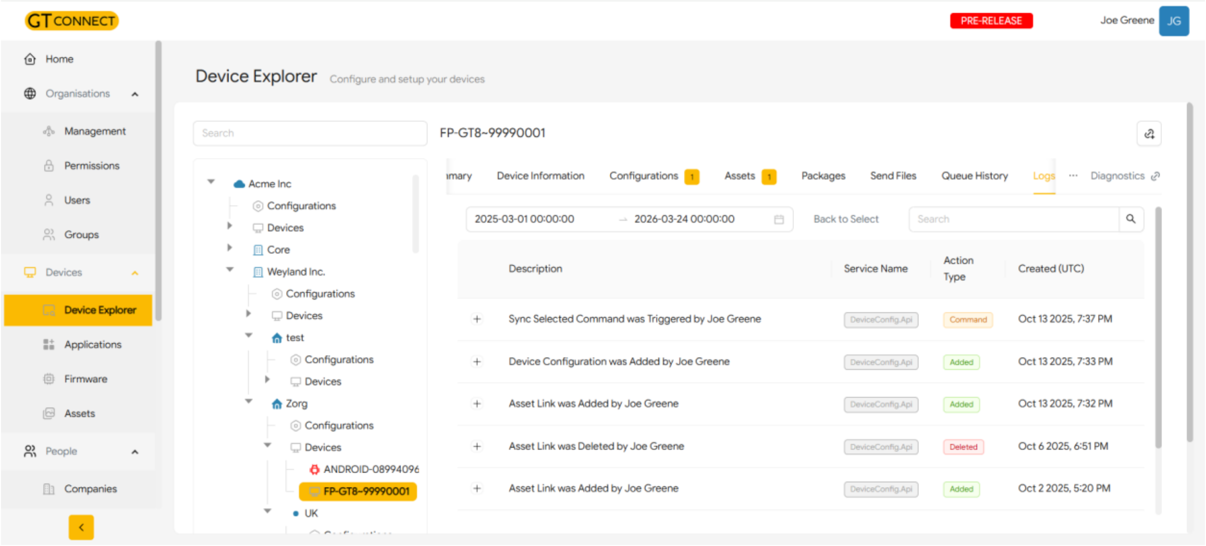


Click **Refresh** to update the data display.

Logs Tab

Use the **Select Device** list box, to select a specific device. The device's description is then displayed at the top of the page.

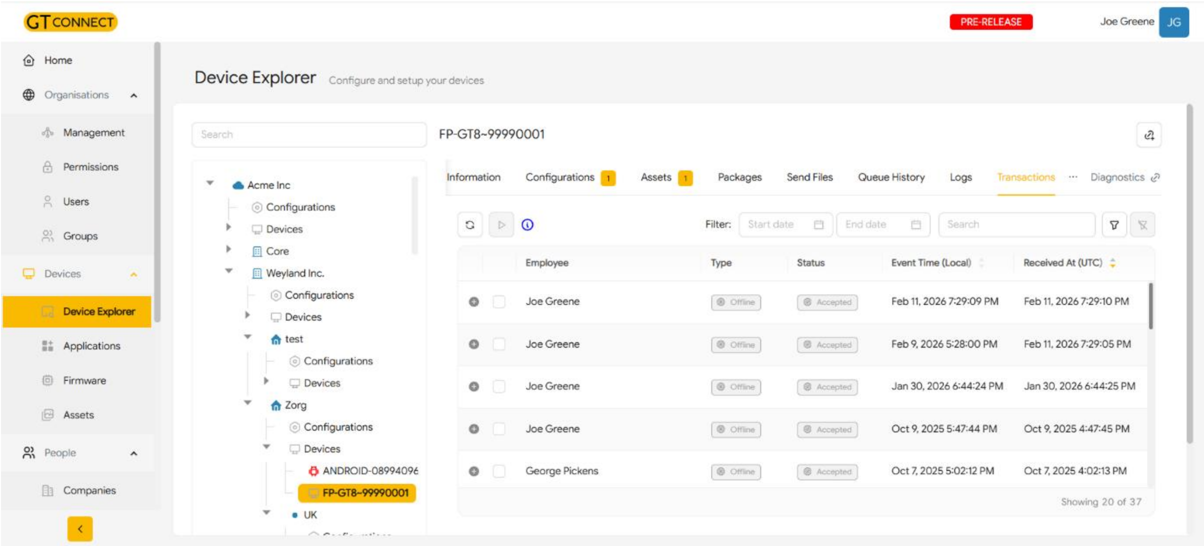
This tab provides an audit of all the activity, such as a modification for a device. It also records who made the modifications and timestamps the activity.



Transactions Tab

Use the **Select Device** list box, to select a specific device. The device's description is then displayed at the top of the page.

The **Transactions** tab displays all the transactions which have occurred on the device over the retention time (which can be set at a Partner, Channel-Partner or Company level, the changes are inherited down from the top node).



To view additional details for a specific Transaction, click +, the view expands to display a breakdown of the Transaction. When you have finished, click − to minimise the view.

Use the column headers to change the order in which Transactions are displayed.

Additionally Transactions can be filtered through the search, start date and end date filters.

Additionally by selecting transactions and then pressing the ▷ **Play** button you can resend transactions. The purpose of this is mostly for replaying transactions which were not received by partner systems

Device Explorer- Deploying Devices

Where a subscription has been purchased and devices have either been bought or rented, you then need to allocate and distribute these devices to their Channel-Partners and Companies.

The Organisation hierarchy displays a **Devices** synthetic node, which can be selected to see those devices.

Distributing/Allocating Devices

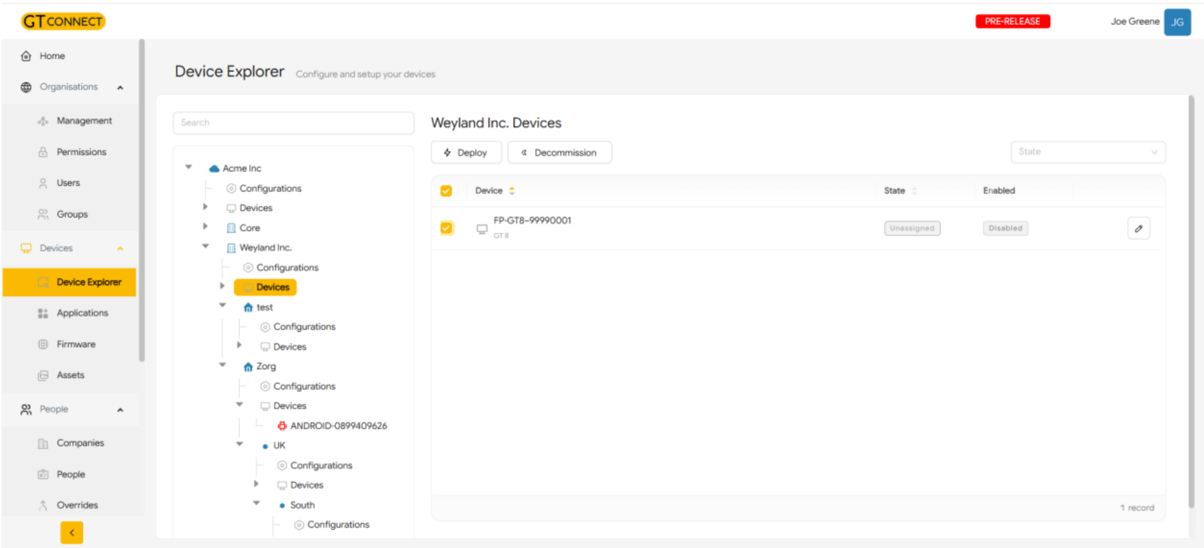
Devices can be allocated anywhere within the Organisation, using the **Device Allocation** page. For more information, see:

- “Device Explorer - Deploying Devices” on page 49.
- “Assigning/Moving Company ” on page 53.

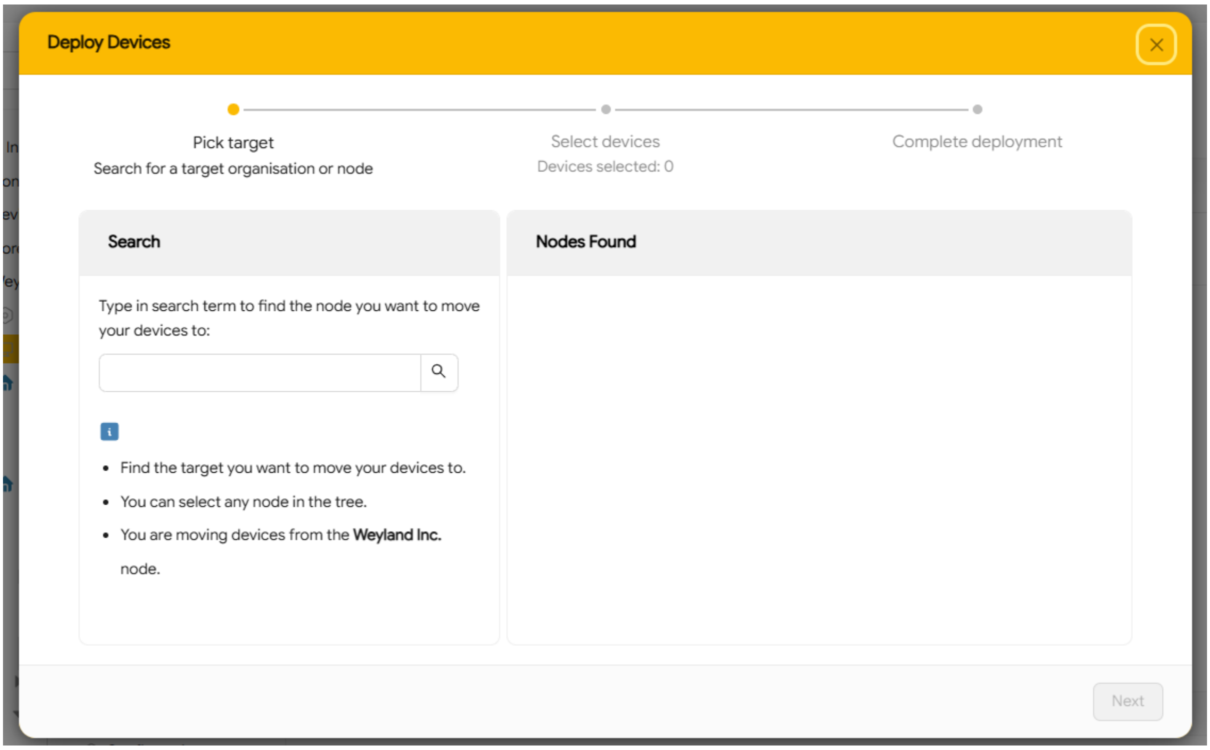
Deployment

The most efficient way to set up a device involves ‘Deploying’ the device. This combines the steps of allocating the device from the Partner/Channel-Partner node down the tree, and allows you to assign the device and enable it in one single step. The process to do so is as such:

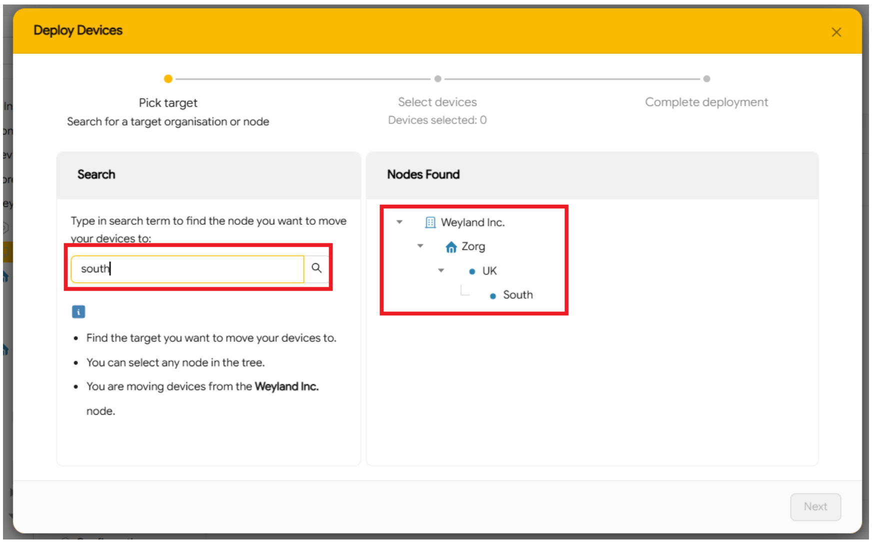
1. Select the Devices menu and click Device Explorer.
2. To allocate a Device, click Devices under the Partner or Channel-Partner Node
3. Tick the device(s) you want to Deploy



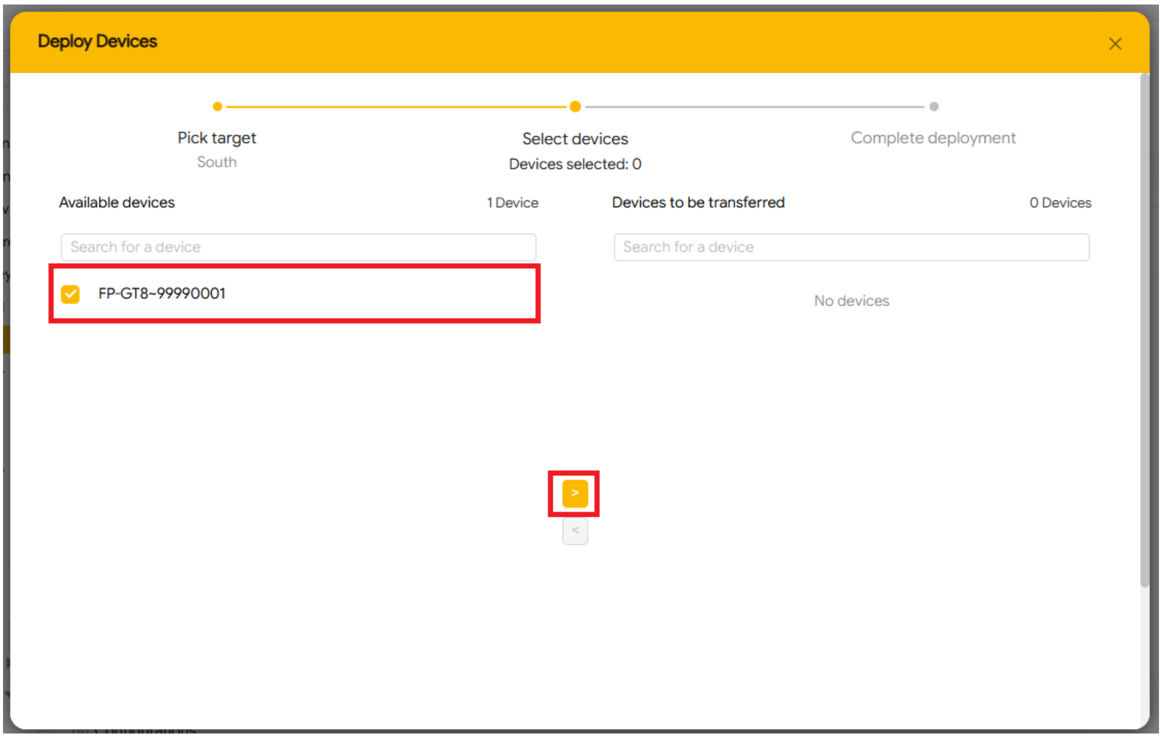
4. Click on **Deploy** This should bring up a new window



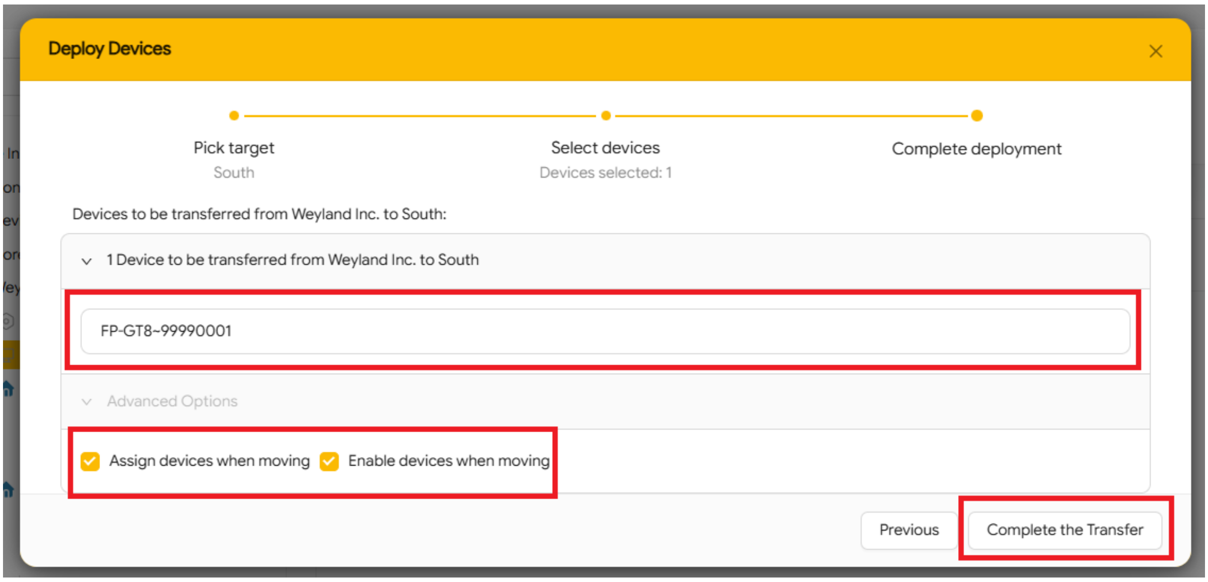
5. Type in the name of the node that you would like to deploy to & then click on the Node's name



6. Click **Next**
7. Select devices to be transferred, by setting your list on the right under "Devices to be transferred". Devices can be moved between the lists by ticking them and then clicking ">" to add them, or "<" to remove them.



8. Click **Next**
9. Confirm that the device list is correct
10. Tick "Assign devices when moving" & "Enable devices when moving" if you would like the device assigned/enabled



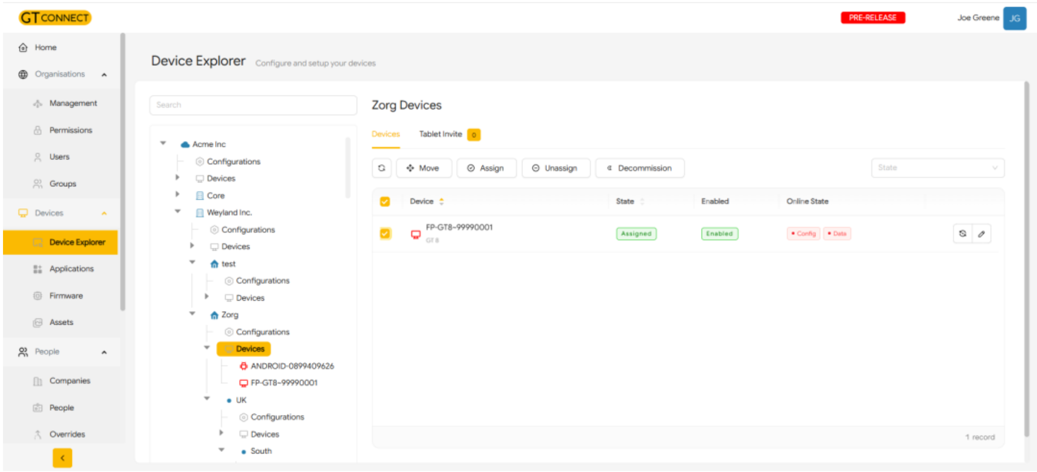
11. Click Complete the Transfer

Assigning/Moving Company Devices

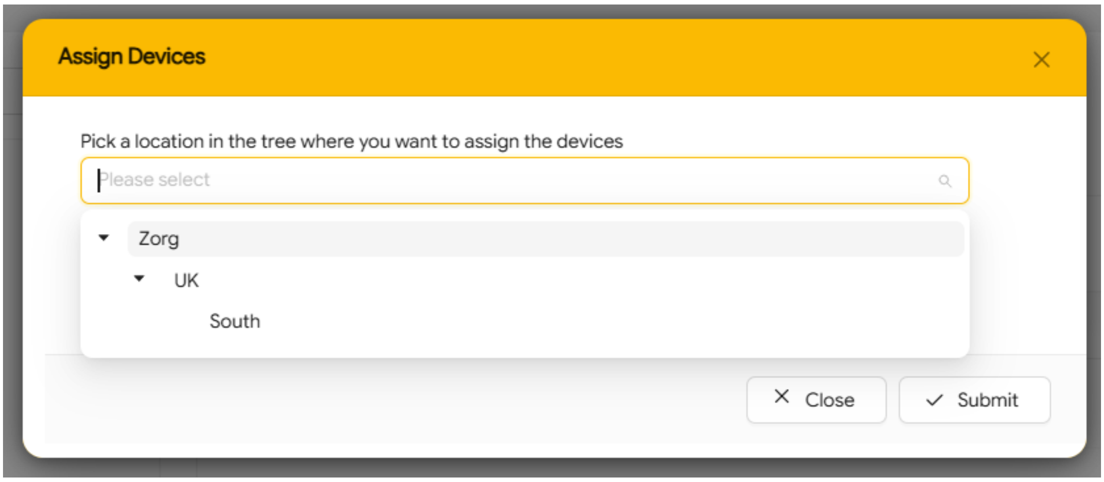
In GTConnect you can either move or assign devices, both fulfilling similar functions: Moving, which lets you relocate a device beneath a company but not out of a companys node structure. Assigning it can only be done down the tree, but additionally it sets the device state to Assigned

To move/assign a Company's devices to or between structural nodes, do the following:

1. Select the **Devices** menu and click **Device Explorer**.
2. Use the hierarchy and select **Devices** under the required Company or Structural node.
3. Select the check box(es) next to the device(s) you want to Assign/Move. You can use the State column filter to sort devices, so that only unallocated/unassigned devices are displayed.
4. For information, the name of the device(s) is displayed.



5. In the location list box, select the name of the Company or Structural node where the device is to be allocated. You can also select multiple devices at this screen



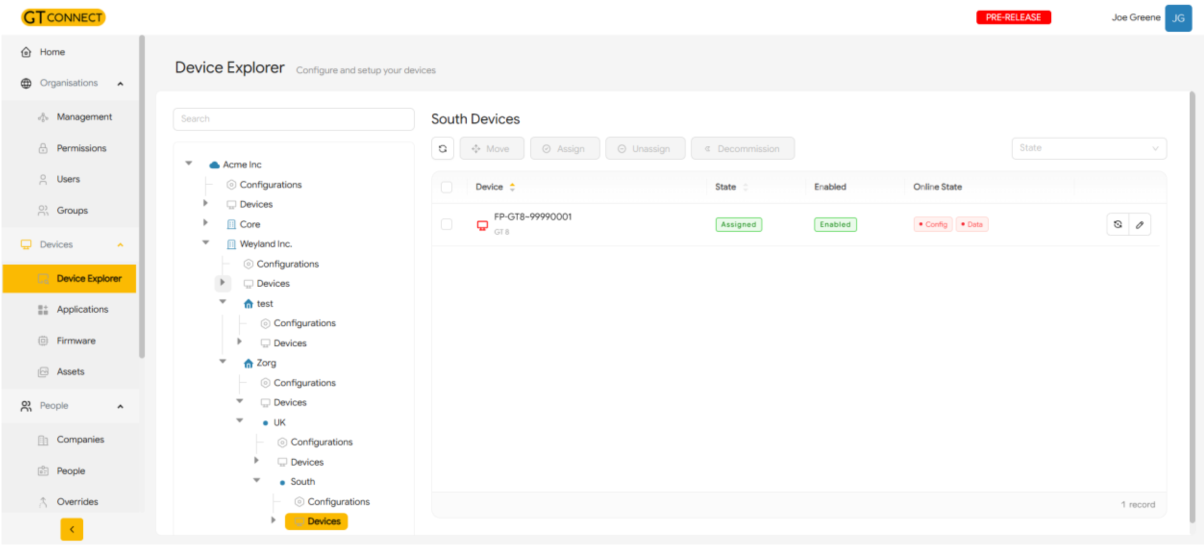
6. Click **Submit** to commit your selection or click **Close** to abandon the allocation.

Unassigning/Decommissioning Devices

Devices can either be Unassigned, which moves the device to the Company node, and sets the state to "Unassigned"; or they can be Decommissioned which sends the device back to the organisational unit above that assigned it to the company (If the user is defined on a company and the device was allocated via a Channel-Partner node, it should return to the channel partner node; if the user is defined on a Channel Partner node and the device was allocated via a Channel Partner node, it should return to the Channel Partner node; if the user is defined on the Partner node, then the device should return to the Partner node), and then sets the state to "Unassigned"

If any devices need to be unallocated/Decommissioned at Company or Structural node level, do the following:

1. Select the **Devices** menu and click **Device Explorer**.
2. Use the hierarchy and select **Devices** under the required Company or Structural node.
3. You can use the **State** column filter to sort devices, so that only unallocated/unassigned devices are displayed.



4. Select the check box(es) next to the device(s) you want to unassign/decommission and click **Unassign or Decommission.**
5. Click **Yes** on the confirmation to unassign or decommission the device or **No** to abandon the action.

Reallocating Devices Between Channel-Partners

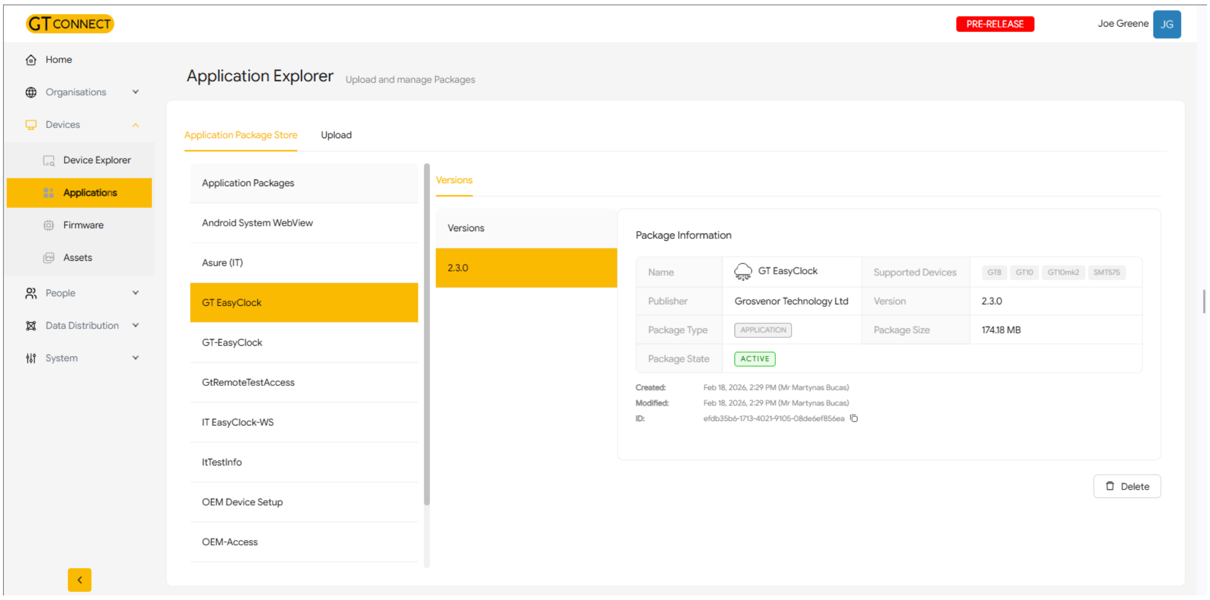
There may be occasions where a device needs to be moved to a different Company within the Organisation. In this case you must Decommission the device and then deploy the device to the new company.

If a device needs to move to an alternative location within the Organisation, you can move it as was explained in the “Assigning/Moving Company devices” section. Examples of the various possible movements are shown here.

Managing Applications & Firmware

> **Note**: if you are unable to see or use this functionality, it is because you don’t have the relevant permission.

The **Application & Firmware** pages allow you to upload Applications/Firmware. It is possible for you to upload multiple versions of an App: such as EasyClock.



To view details for either an Application Package or Firmware Package, click the relevant tab. To view details about a specific Package:

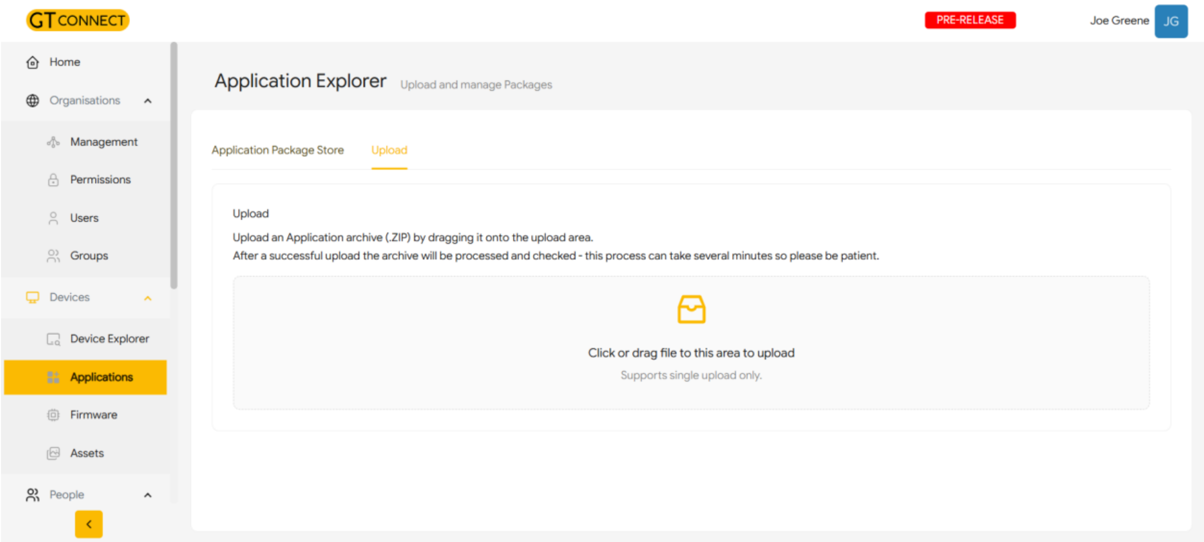
Under **Application Packages or Firmware Packages**, select the required item, next select the required version. The **Packages Information** section automatically updates to reflect your selection. **Note**: the details are automatically included within the download.

Uploading Applications or Firmware

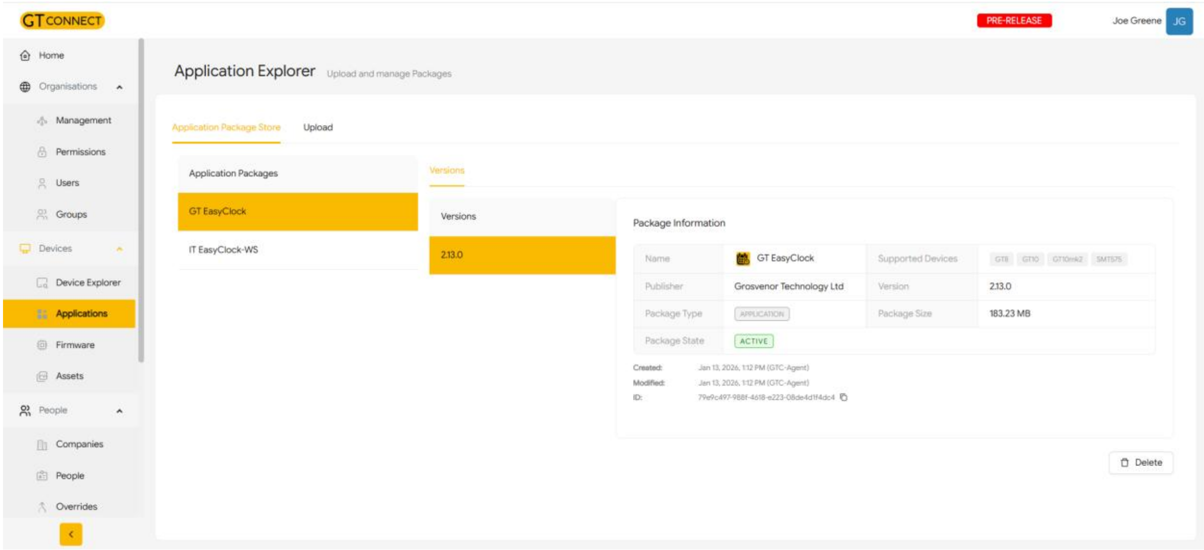
In order to upload an Application or Firmware, you need a Zip file. To upload the file either drag- and-drop it onto the designated area on the **Upload** tab of the correct page or click the designated area and navigate to the file's location.

To upload an Application or Firmware, do the following

1. Select the Devices menu and click Applications/Firmware.
2. On the Applications or Firmware page, Click the Upload tab.



3. Either click the dedicated upload area, so that you can navigate to the location of the Application or Firmware or drag-and-drop the Application or Firmware zip file to dedicated upload area.
4. When the zip file has been uploaded it is then processed and checked. When successful, the Application or Firmware is displayed on the relevant tab. For example:



Managing Assets

Note: if you are unable to see or use this functionality, it is because you don't have the relevant permission.

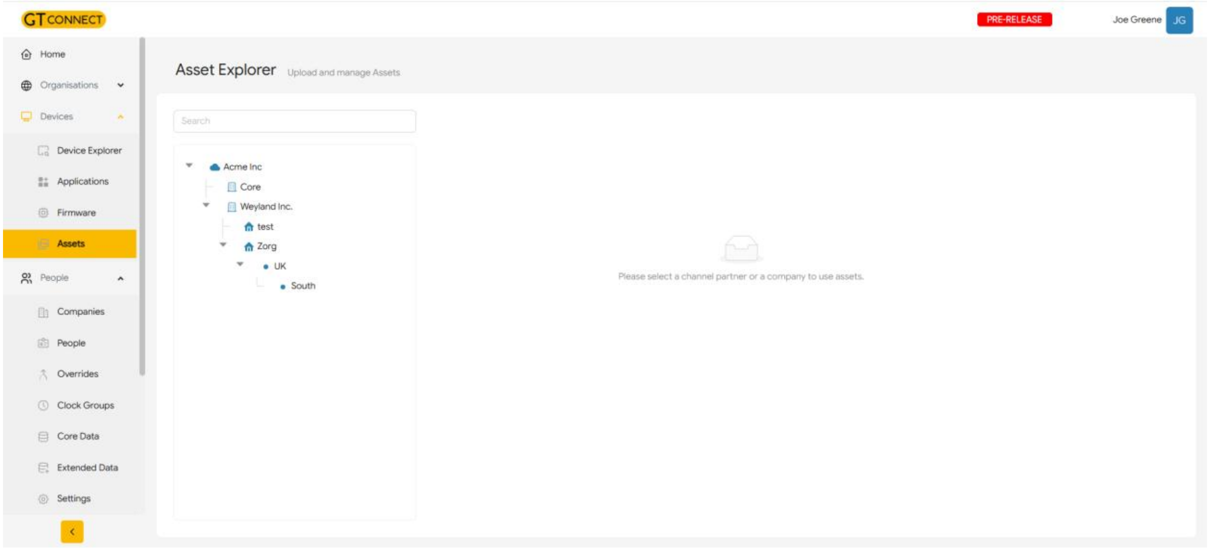
The **Asset Explorer** is a repository where you can upload files, such as graphics and policies. When an Asset has been uploaded, it is displayed on the **Device Explorer** page, where it can be selected and then pushed to every device for the specified Channel-Partner, Company or Structural node.

Using the Asset Explorer page

The **Asset Explorer** page is a repository for graphics and files. When you select an Asset, the **Assets** tab updates to display relevant information about the file: for example, which devices are supported and the Asset's status.

Assets can be stored at any level within the device tree. All child nodes of a node where an asset is uploaded will inherit access to that asset, including their own descendants.

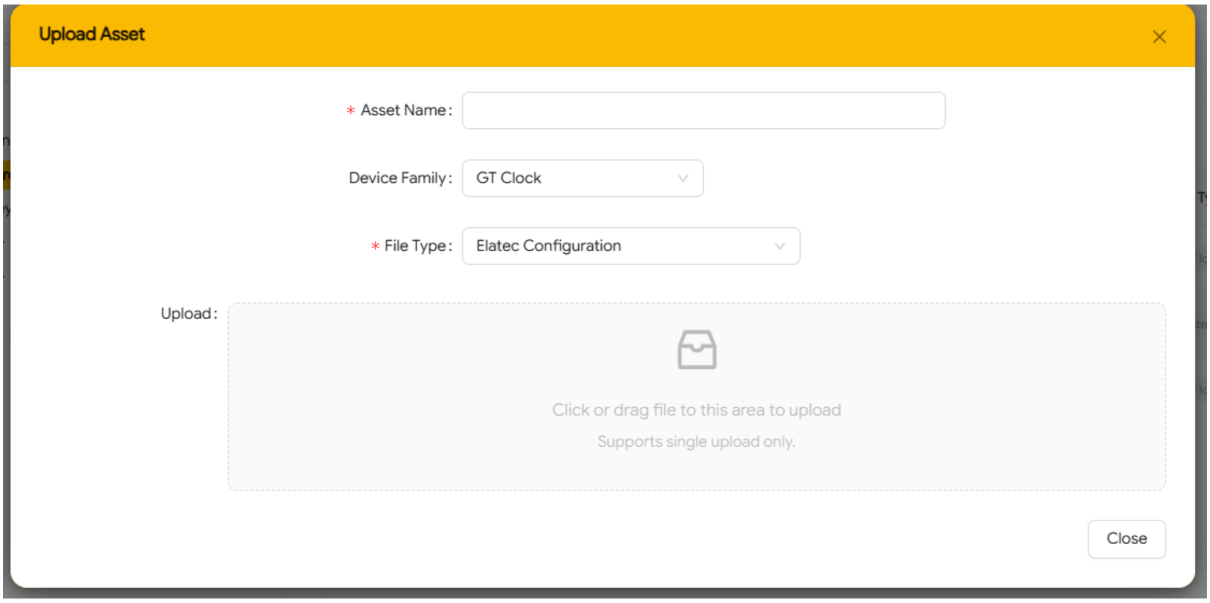
To display the **Asset Explorer** page, select the **Devices** menu and click **Assets**.



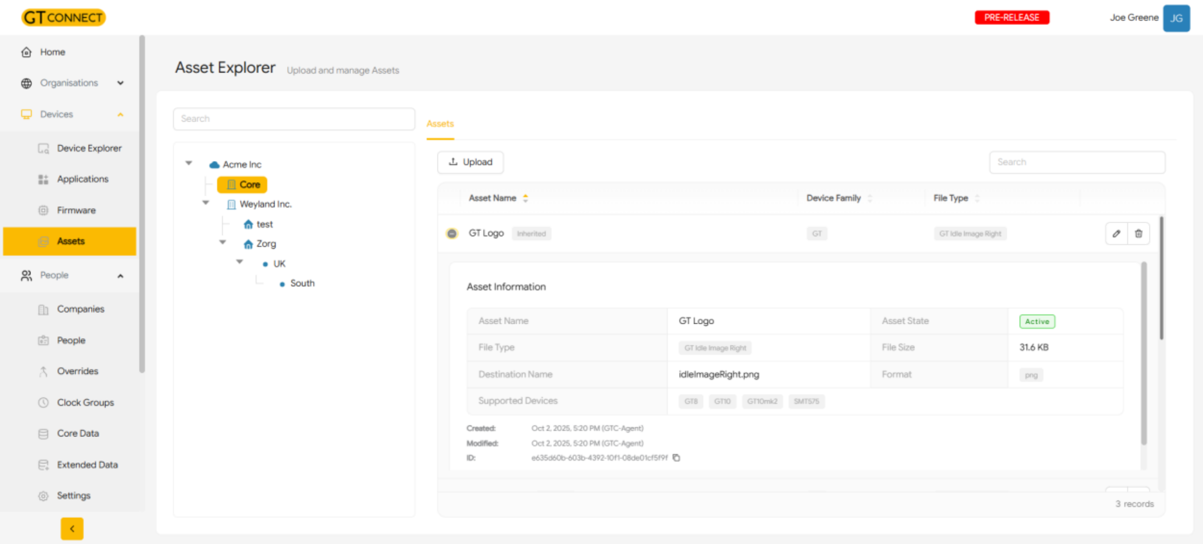
Uploading Assets

To upload an Asset, do the following:

1. Select the **Devices** menu and click **Assets**.
2. On the **Asset Explorer** page, click the **Upload** tab.



3. Enter the following information:
    - **Asset Name**. Enter the name of the Asset you want to upload.
    - **Device Family**. Use the list box to select the device series type: for example GT.
    - **File Type**. Use the list box to select how/where the Asset is to be used: for example, Idle Image Background.
    - **Upload**. Either click the upload area and navigate to the Asset's location or drag- and-drop the Asset file into the dedicated upload area.
4. When the Asset has been successfully uploaded, the asset tab will be shown again



To send an Asset to a device, use the **Assets** tab on the **Device Summary** page. For more information, see "To Send Assets To a " on page 45.

Managing Configurations

This section discusses how to create configurations at an organisational level, which can then be deployed to any device within the device tree under this node. On page x it was discussed how to create a configuration for an individual device.

In this case, configurations refer to any modifications you make to a device, which includes any graphics/logos and any policies, and so on which then get uploaded onto a device. You can create, modify and delete configuration items, as required. For more information, see:

- "Configurations" on page 60.
- "Adding Configurations" on page 60.
- "Modifying Configurations" on page 64.
- "Deleting Configurations" on page 66.

Configurations

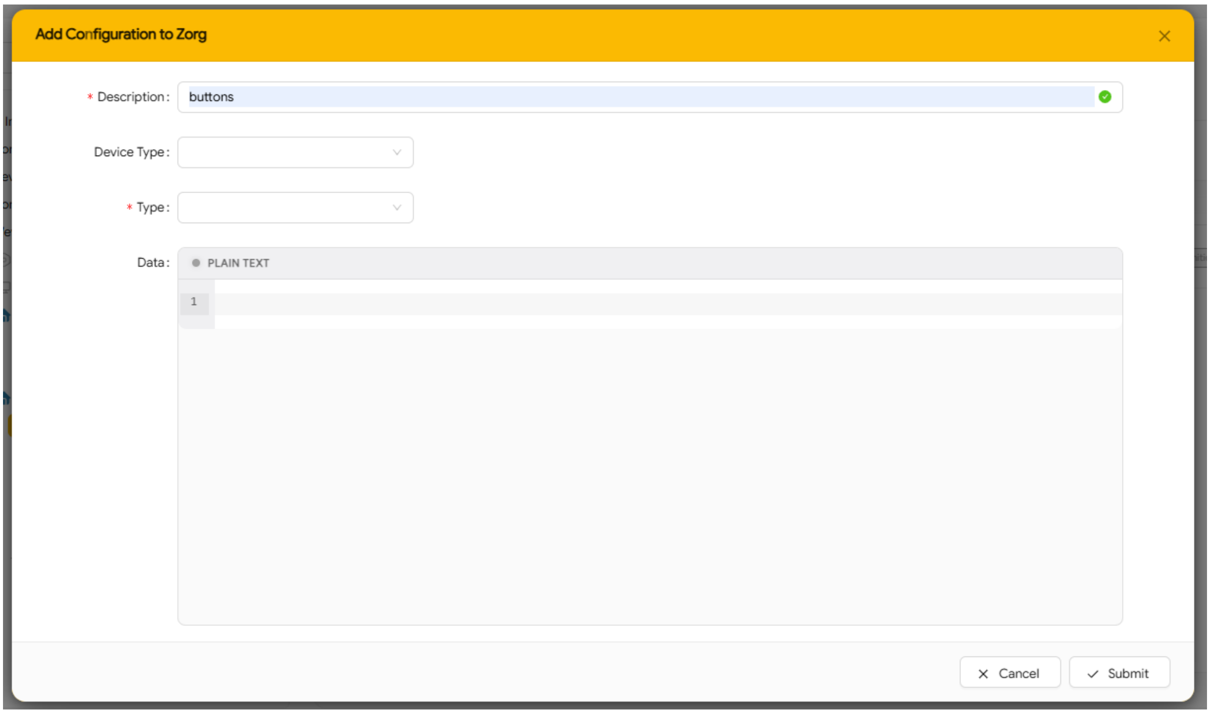
Configurations refers to a collection of multiple elements, which can include:

- **Configurations**. Specify standards and what needs to be configured: for example, updating Firmware, table data, and so on. For more information, see "Adding Configurations" on page.60
- **Assets**. This allows you to customise the device, using graphics and policy files. For more information, see "Adding Assets" on page 63.
- **Packages**. This refers to the Applications and Firmware which are used on devices. For more information, see "Adding Packages" on page 63.

Adding Configurations

To add Configurations, do the following:

1. Select the **Devices** menu and click **Device Explorer**.
2. Use the hierarchy and select **Configurations** under the required Channel-Partner/ Company or Structural node. If Configuration isn't displayed under the required node, select the node, using the Organisation hierarchy, and on the **Core Summary** section, click **Add Configuration**.
3. Click **Add**.



4. Enter the following information:
   - **Description**. Enter the name of the configuration type to make it easily identifiable: for example, Standard Buttons.

- **Device Type**. Use the list box to select which category of device the configuration is intended for: for example, GT Clock.
- **Type**. Use the list box to determine the configuration: for example, whether it is a button customisation, update request or table data.
- **Data**. In the box, enter the configuration detail.

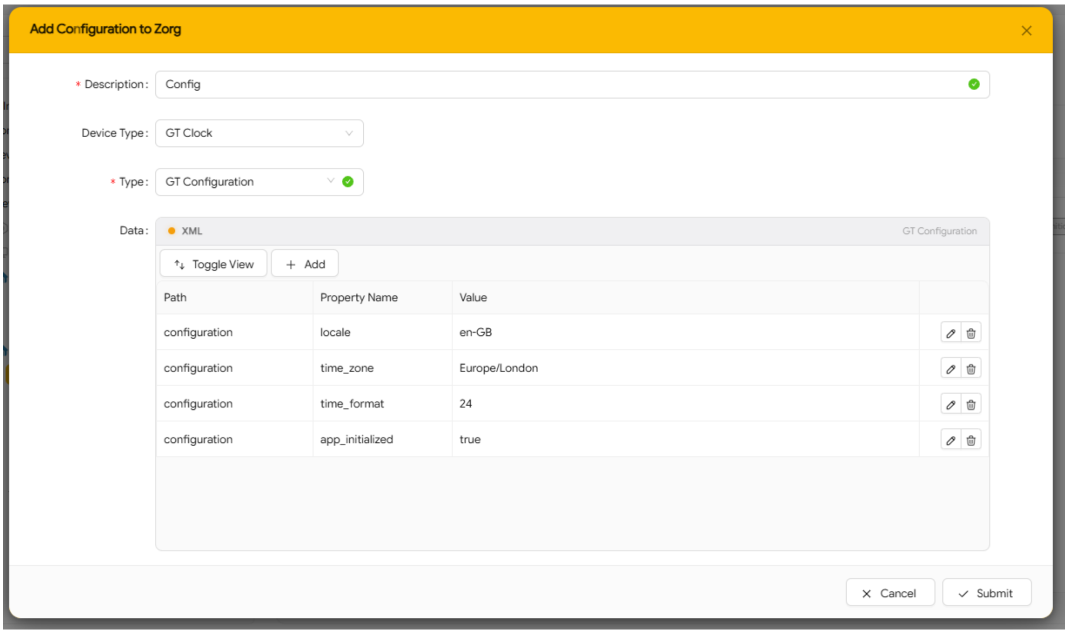
5. Click **Submit** to commit the configuration details. A sequential number is displayed by the tab name to denote there is X many items available. Alternatively, click **Close** to abandon the configuration update.

Adding Configurations – Toggle View

With some types of configuration (such as GT Configuration) you can set individual values if the configuration, which may be more user friendly. You can switch between this view and XML by clicking “toggle view”. These act as a wrapper to the XML, so you can toggle the view between will convert between this view and the standard XML.

To use this type of configuration:

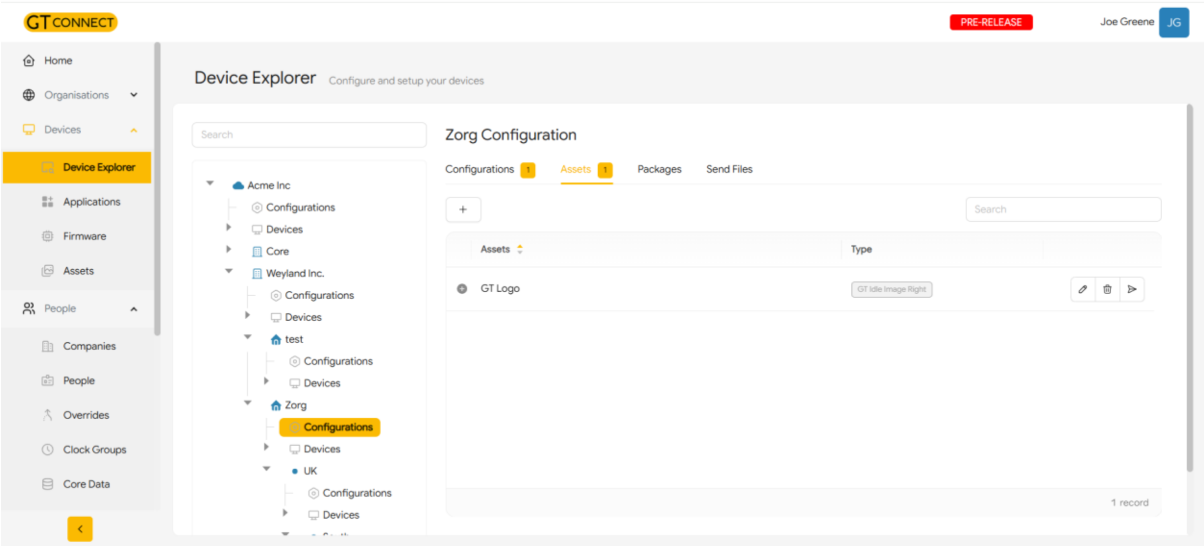
- To edit a line click on the edit button, then change the path, property name or value and then click either the tick or cross
- To delete a line press the delete button



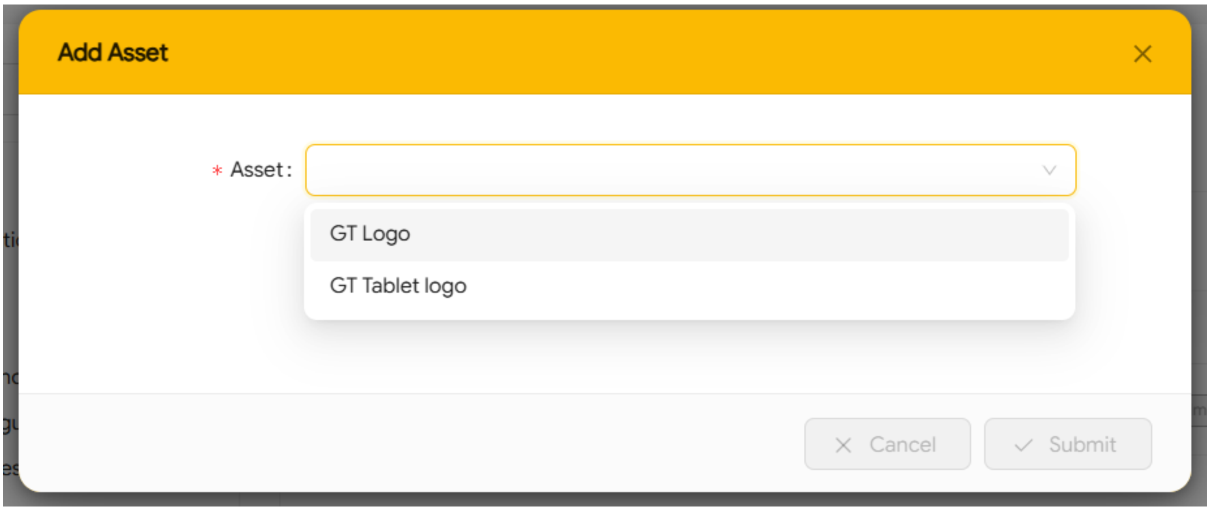
Adding Assets

Assets allow you to customise the appearance of devices using graphics and logos: for example.

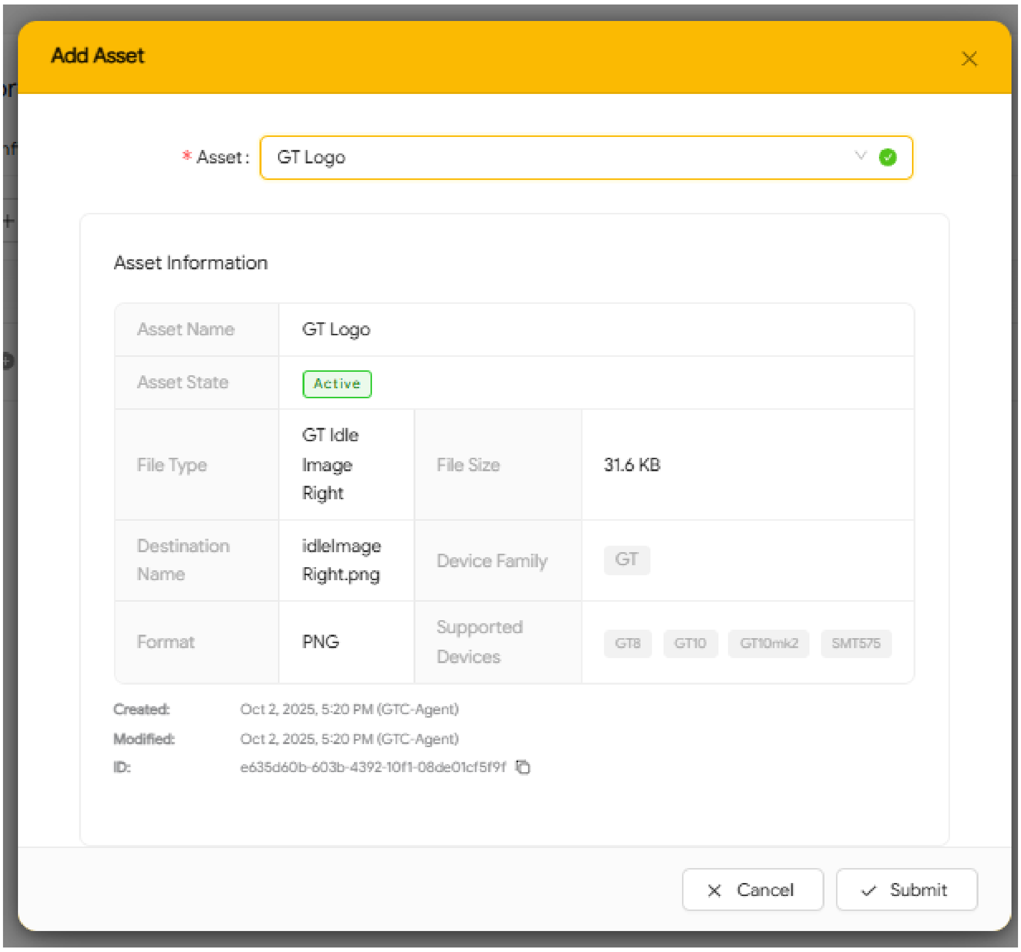
1. Select the **Devices** menu and click **Device Explorer**.
2. Use the hierarchy and select **Configurations** under the required Channel-Partner/ Company or Structural node.
3. On the **Device Explorer** page, click the **Assets** tab.



4. Click **+**.



5. Select the required Asset. **Note**: if the Asset you require is not available for selection, it is because it hasn't been uploaded. For more information, see "Managing Assets" on page 6-21.



Details for the selected Asset are displayed.

6. Click **Submit** to commit the Asset or click **Close** to abandon uploading the Asset to the device.

When new Configuration elements have been submitted, a sequential number is displayed by the tab name to denote there is X many items available.

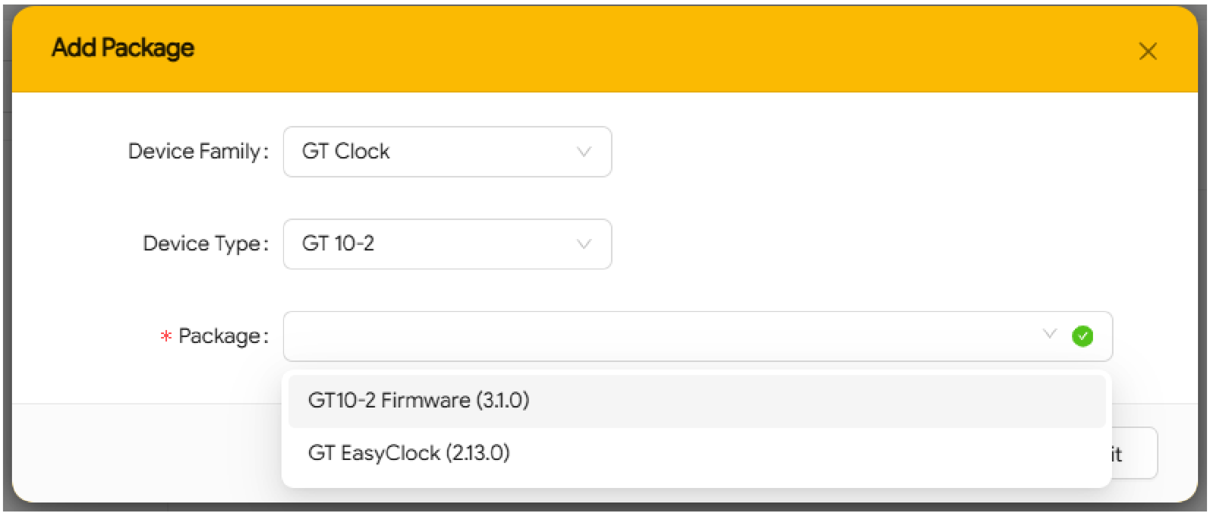
Adding Packages

Packages refers to the Firmware on a device. If the Package you require is not displayed it is because it hasn't been set up. For more information, see "Managing Applications" on page 6-18.

To add Packages, do the following:

1. Select the **Devices** menu and click **Device Explorer**.
2. Use the hierarchy and select **Configurations** under the required Partner, Channel-Partner, Company or Structural node.

3. On the **Device Explorer** page, click the **Packages** tab.
4. Click **Add**.



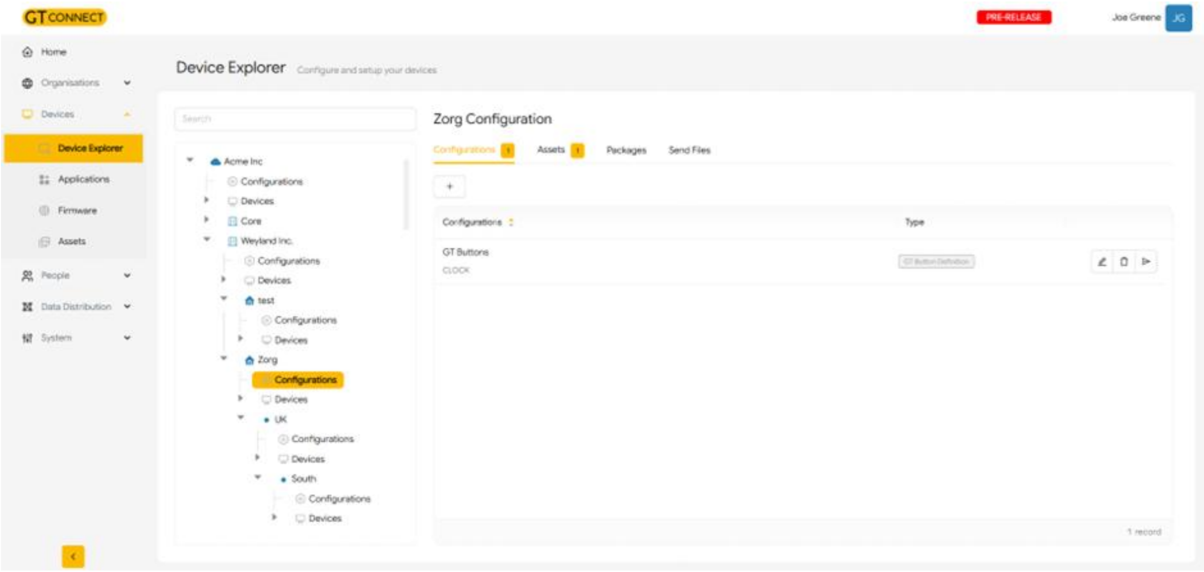
5. Enter the following information:
   - **Device Family**. In the list box, select the device range: for example, GT Clock.
   - **Device Type**. In the list box, select the device model.
   - **Package**. In the list box, select the required application or Firmware, and version. The **Add Package** dialog box updates to display a **Package Information** area.
6. Click **Submit** to commit the package or click **Close** to abandon the creation of the package.

A pop-up then displays confirmation that the package has been added and a sequential number is displayed by the tab name to denote there is X many items available.

Modifying Configurations

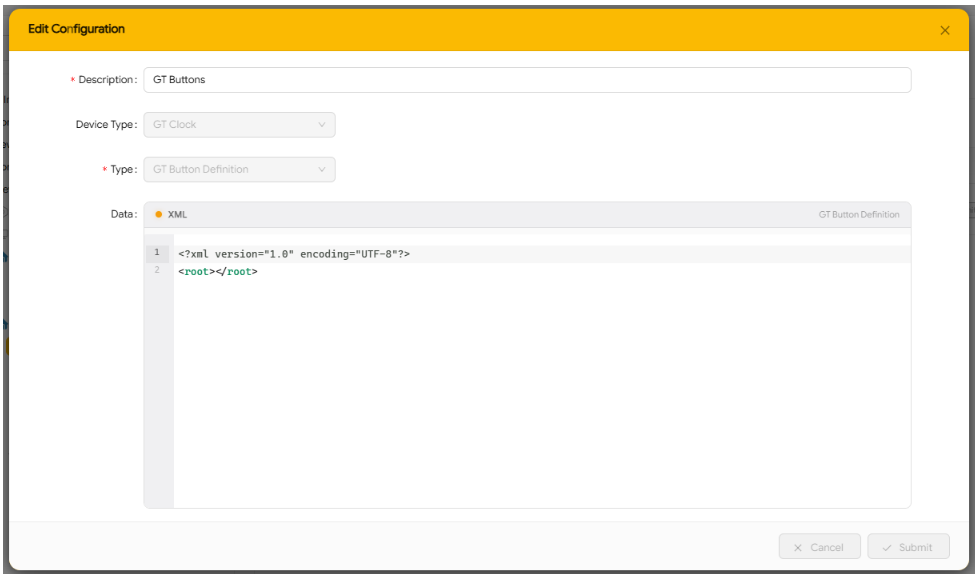
Note: it is only possible to modify Configurations. It is not possible to modify an Asset elements or Package elements. If modifications are required, they must be done using either the **Applications** menu or the **Assets** menu.

You can modify the Configuration elements which have been allocated to an Organisation, using the **Device Explorer** page.



To modify a Configuration, do the following:

1. Select the **Devices** menu and click **Device Explorer**.
2. Use the hierarchy and select **Configurations** under the required Channel-Partner/ Company or Structural node.
3. On the **Device Explorer** page, the **Configurations** tab is automatically displayed.
4. Under **Configurations**, either click the element you want to modify or in the row, click
5. Update.



6. Make the required modifications.
7. Click **Submit** to commit the modification(s) or click **Close** to abandon the modifications and close the **Edit Configuration** dialog box.

Deleting Configurations

To modify a Configuration, do the following:

1. Select the **Devices** menu and click **Device Explorer**.
2. Use the hierarchy and select **Configurations** under the required Channel-Partner/ Company or Structural node.
3. On the **Device Explorer** page, the **Configurations** tab is automatically displayed.
4. To remove a Configuration element, under **Configurations**, click **Delete**.
5. On the confirmation dialog box, click **Yes** to commit the deletion or click **No** to abandon the deletion.

Pushing Configuration Elements to Devices

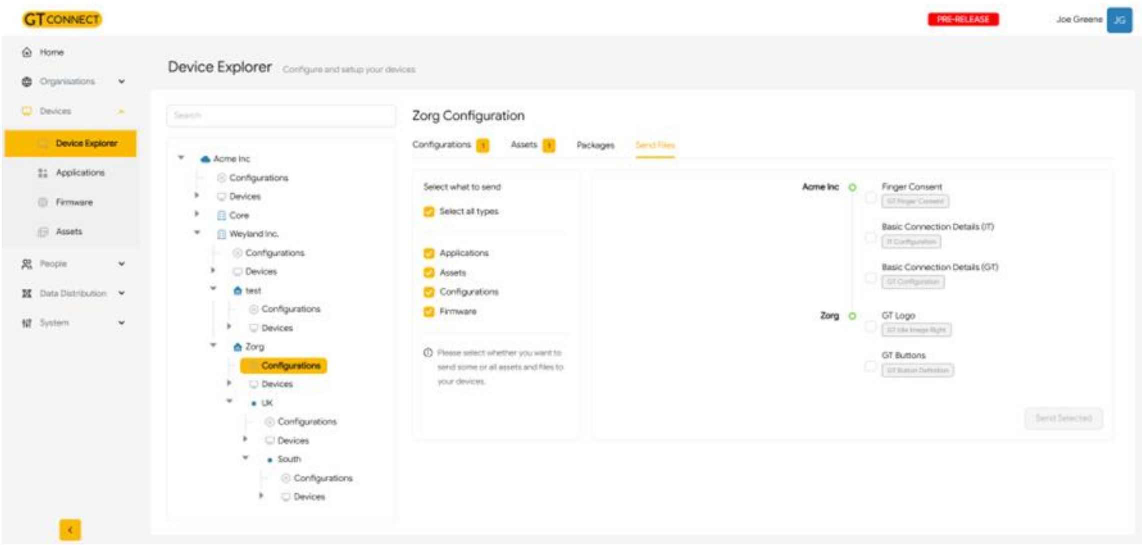
When Configuration elements have been set up it is then possible to push the data to the selected Organisation. To push all Configuration elements simultaneously, use the **Send Files** tab on the **Device Explorer** page. Alternatively, to push individual elements, use either the **Configurations** tab or **Assets** tab.

Note: in order for data to be pushed to a device, the device's state must be **Assigned**, set to **Enabled** and be **Online**. This is done on the **Device Summary** page: for more information, see "Using the Device Explorer Page" on page 36.

Pushing All Configuration Elements to Devices

To push all files to devices, do the following:

1. Select the **Devices** menu and click **Device Explorer**.
2. Use the hierarchy and select **Configurations** under the required Channel-Partner/ Company or Structural node.
3. On the **Device Explorer** page, click the **Send Files** tab.



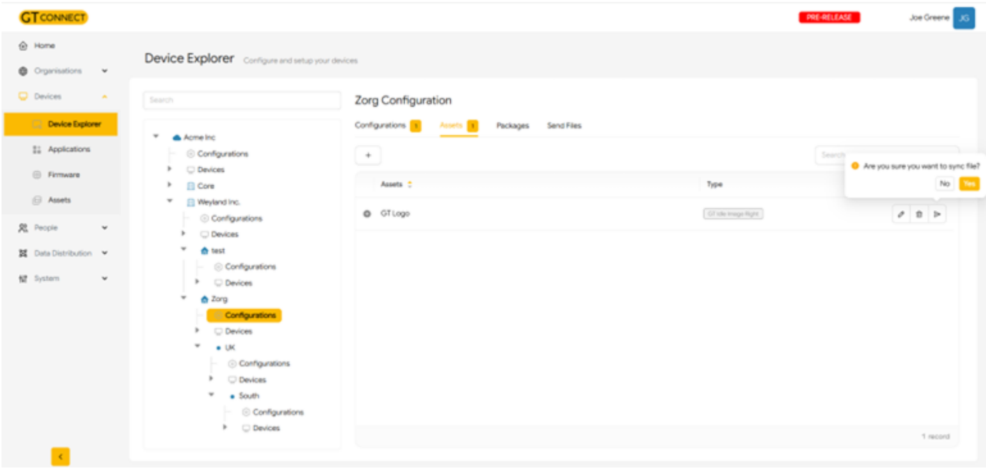
4. You can then specify what is pushed to the Organisation's devices:
   - To view all the Configuration elements to the selected Organisation, select the **Send All** check box. A summary of all the elements is displayed. Under the Organisation's name, select the check box(es) for each Configuration element you want to push to the devices.
   - To view a sub-set of the Configuration elements, select the check box for each element: for example, Assets and Firmware. All the Organisation's elements which have been set-up for the selection are displayed. Under the Organisation's name, select the check box(es) for each Configuration element you want to push to devices.
5. Click **Send All** to push all Configuration elements to the selected Organisation(s). Alternatively, select the check box(es) for each Organisation you want to push the Configuration elements to and then click **Send Selected** to only push the elements which have the check box(es) selected to the selected Organisation(s).

A pop-up is then displayed when the devices' Configuration elements have been synchronised.

Pushing Individual Configuration Elements or Assets to devices

If a Configuration element or Asset element needs to be pushed to devices, do the following:

1. Select the **Devices** menu and click **Device Explorer**.
2. Use the hierarchy and select **Configurations** under the required Channel-Partner/ Company or Structural node.
3. On the **Device Explorer** page, Click **Send Now**, either the **Configurations** tab or the **Assets** tab.

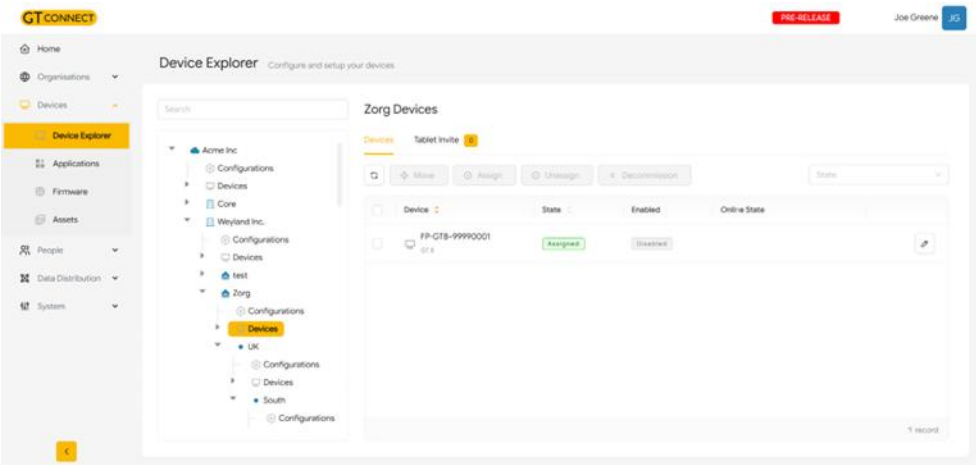


4. To synchronise the element on the devices, click **Yes** to send the element to the devices or click **No** to abandon the process.

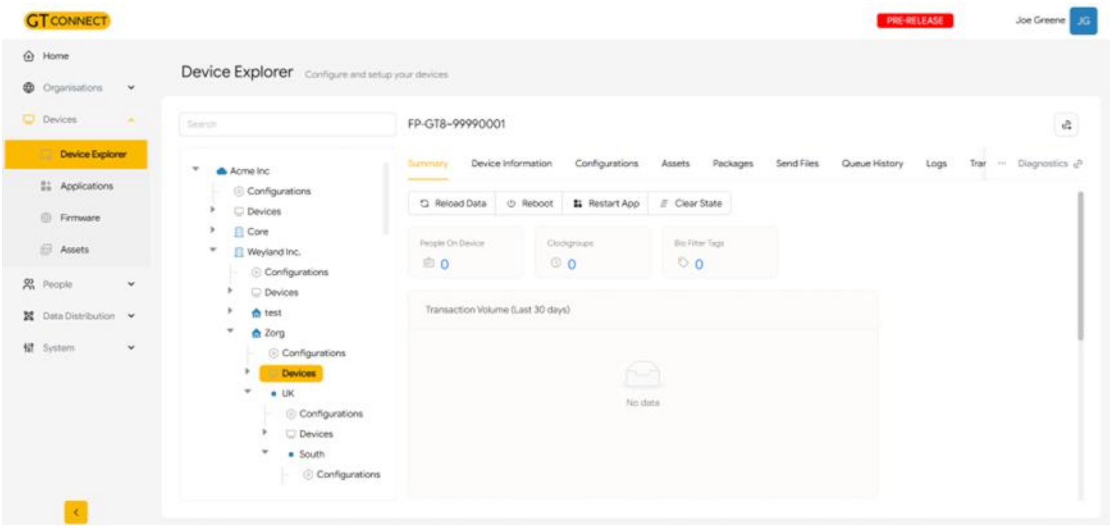
Setting up a device

When a device has been allocated to a node it can be modified: for example, you can change a logo, Applications, and so on. To do this:

1. Select the **Devices** menu and then click **Device Explorer**.
2. In the Organisation hierarchy, under the required node (Channel-Partner/Company), select **Devices**.

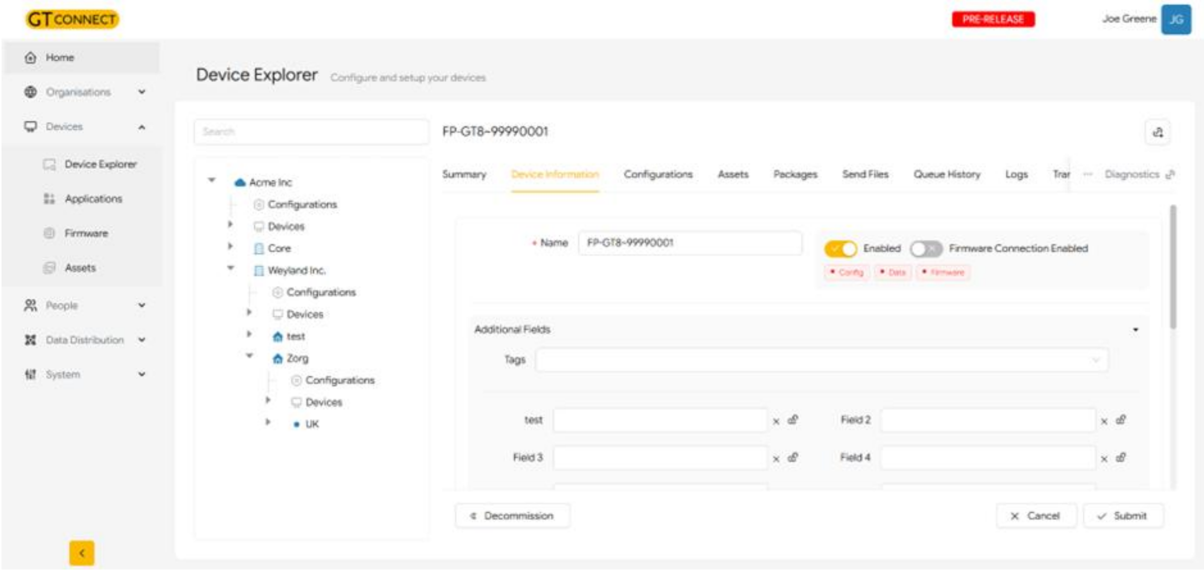


3. The **Overview** page displays all the devices which have been allocated.
4. Locate the required device, either by using the **Search** box, or using the navigation tools.
5. Either click **Update**, or double-click the required device. The **Device view page** is shown

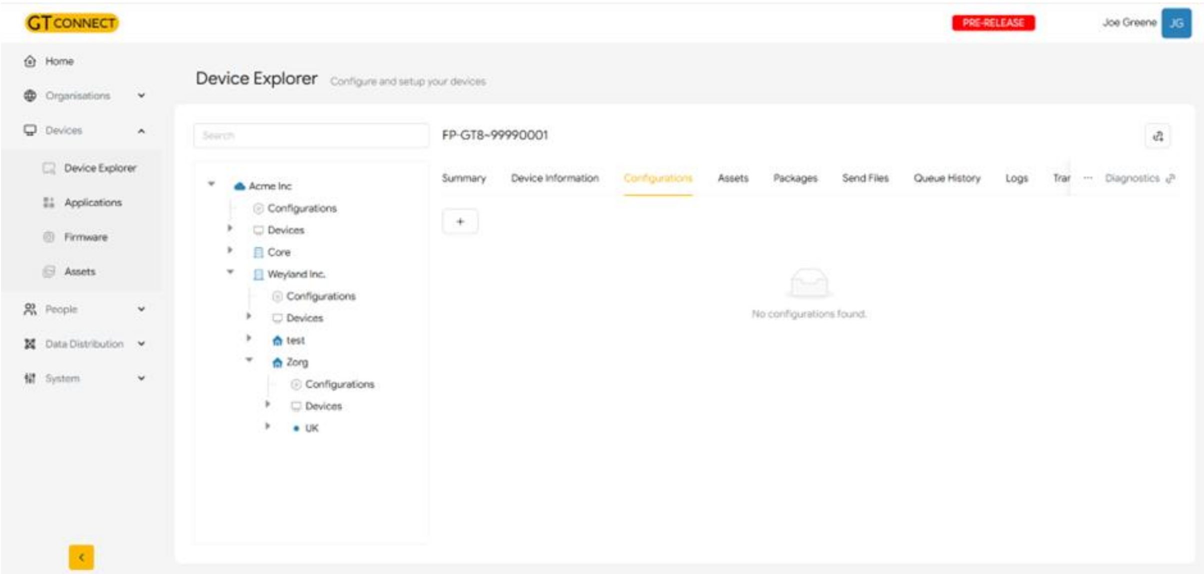


6. On the **Device Information** tab, set the status of the device to **Enabled**, to allow modifications to be made. If not set to Enabled, the device is unable to receive any updates.

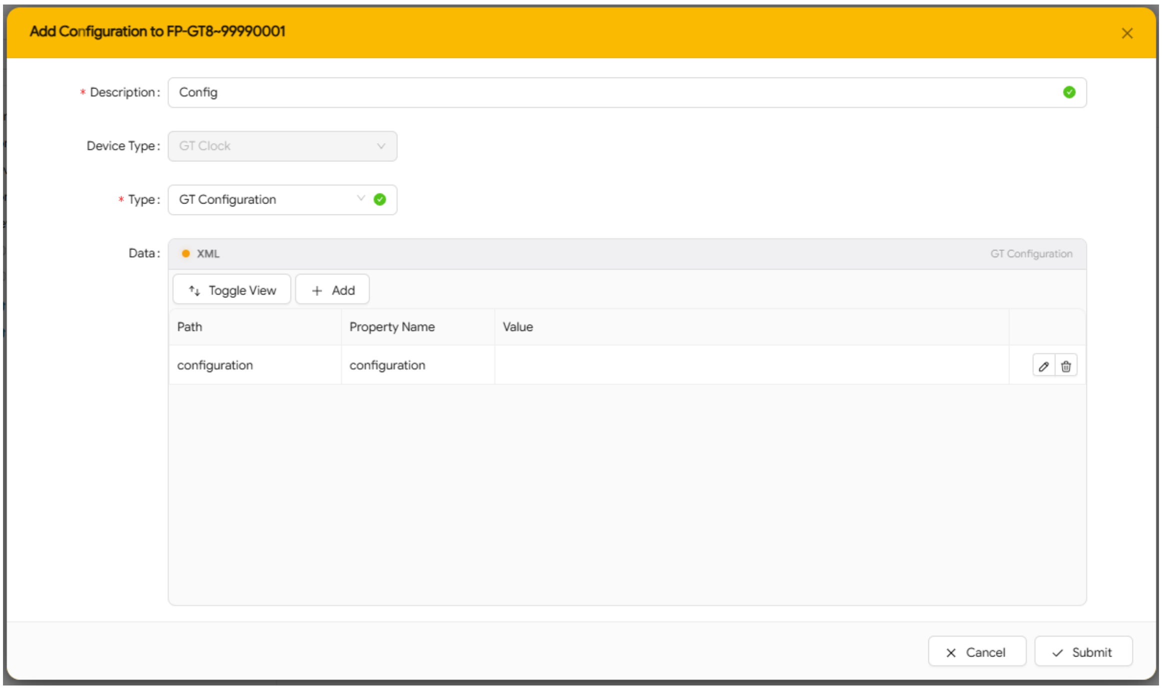
7. Enter any additional information, as required



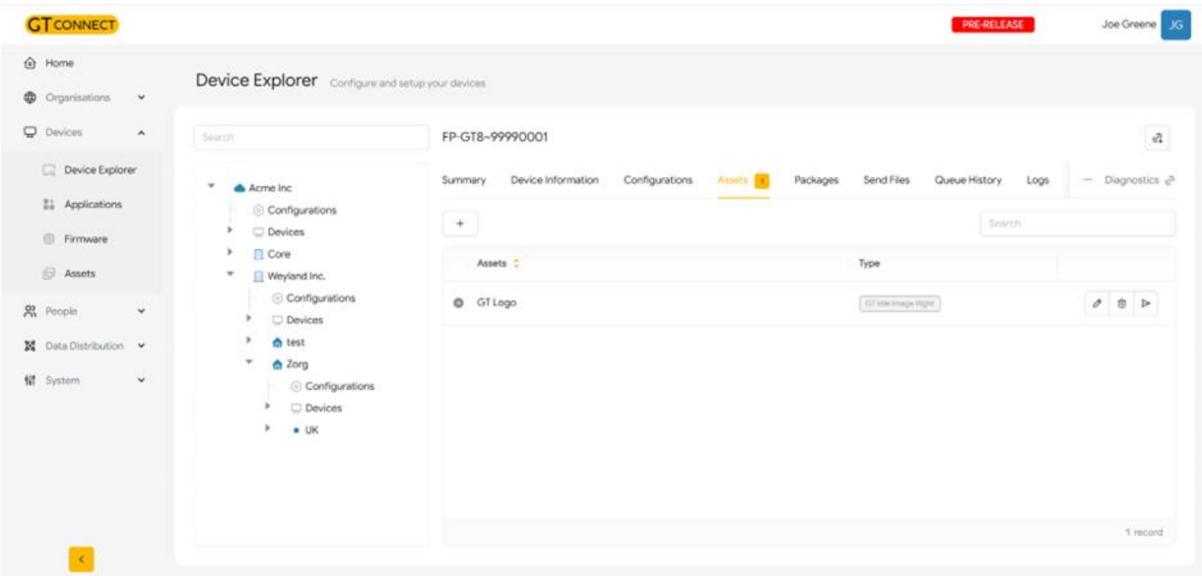
8. Click the Configurations tab.



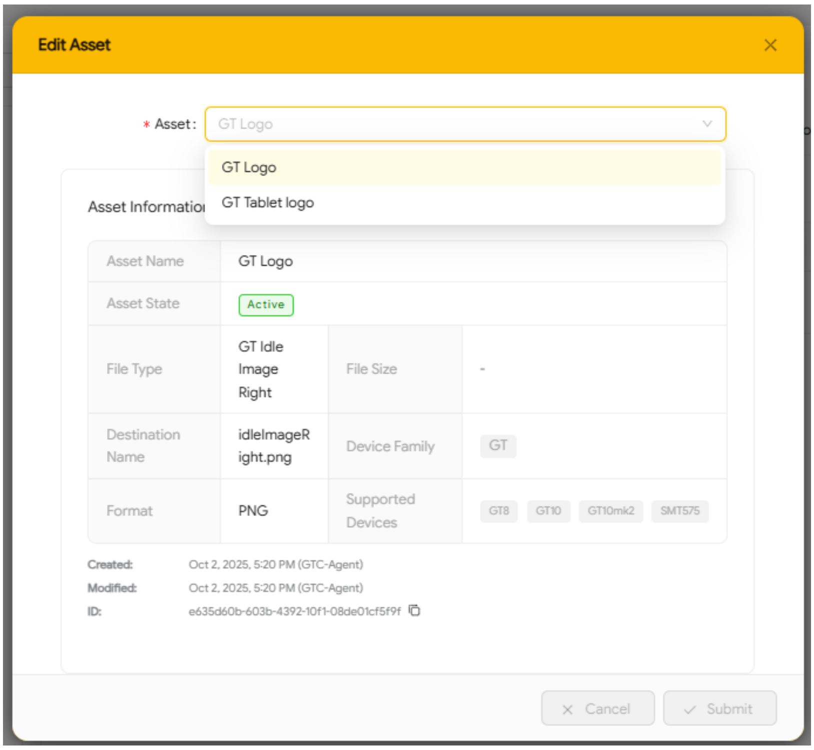
9. Click **+** to create Configurations for the device. For more information, see Adding Configurations on page 60.



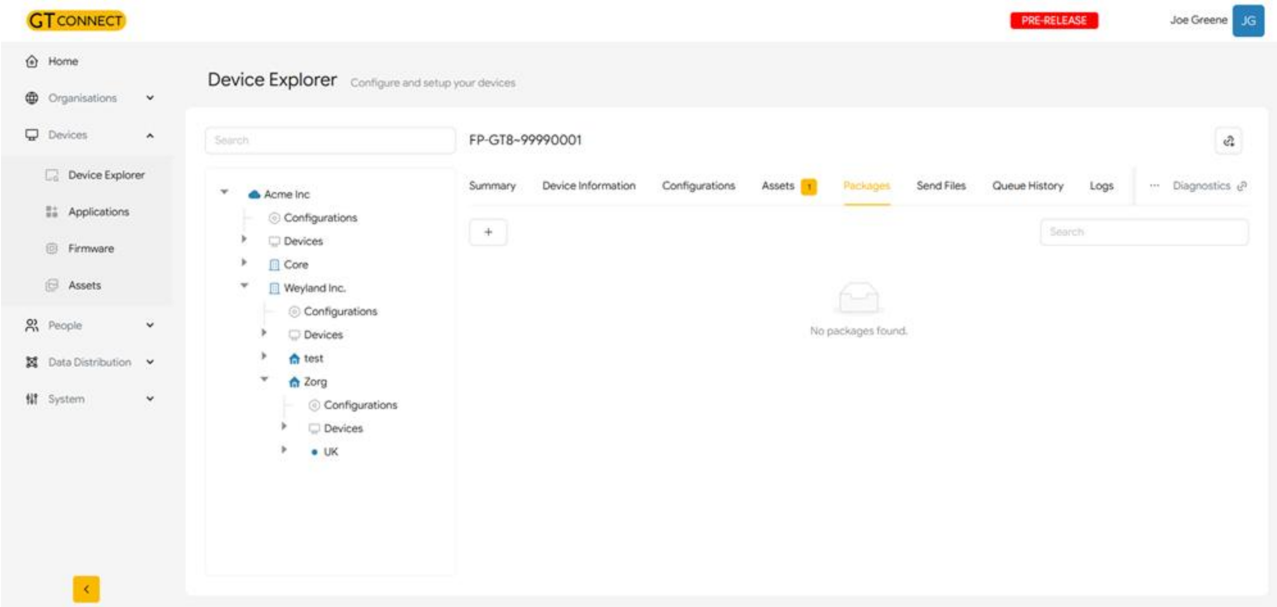
10. Click the **Assets** tab.



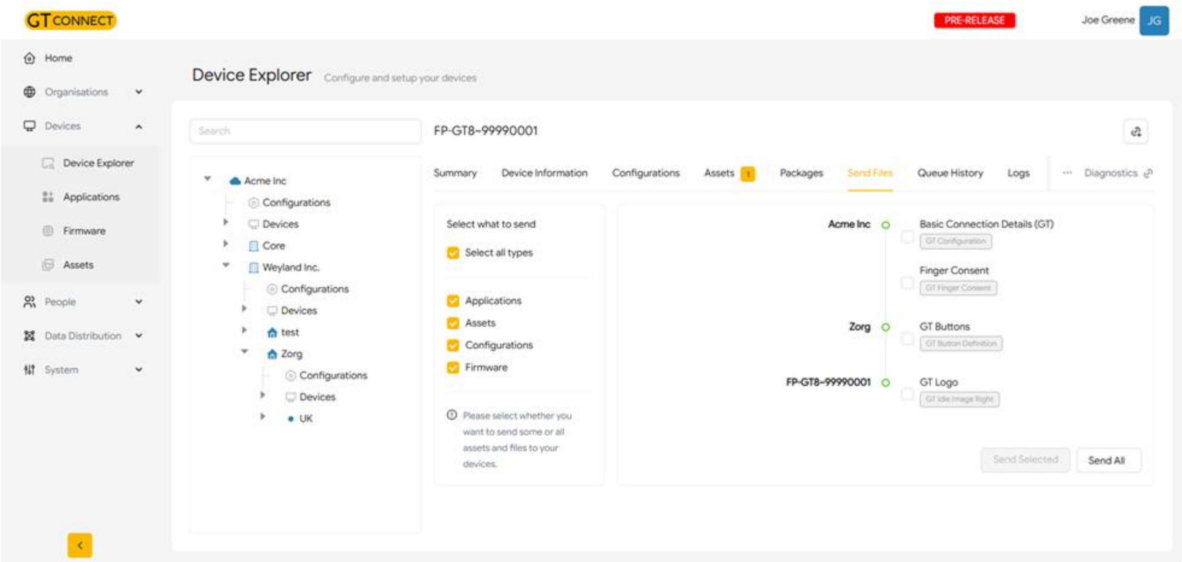
11. Click **Add**.



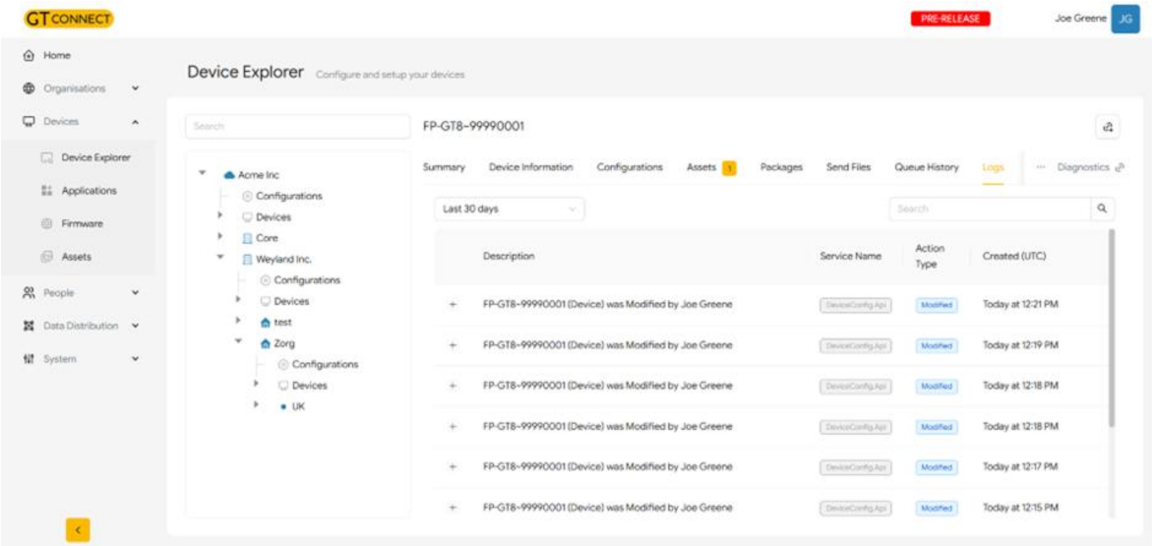
12. In the **Asset** list box, select the required Asset and then click **Submit** to commit the selection. For more information, see "Managing Assets" on page 57.
13. Click the **Packages** tab, to manage the Applications which are on the device.



14. To add a Package, click **Add**. For more information, see “Packages ” on page 45 and “Managing Applications” on page 6-18.
15. Click the **Send Files** tab to specify what Application, Assets, Configurations, Consents and/or Firmware is sent to the device.

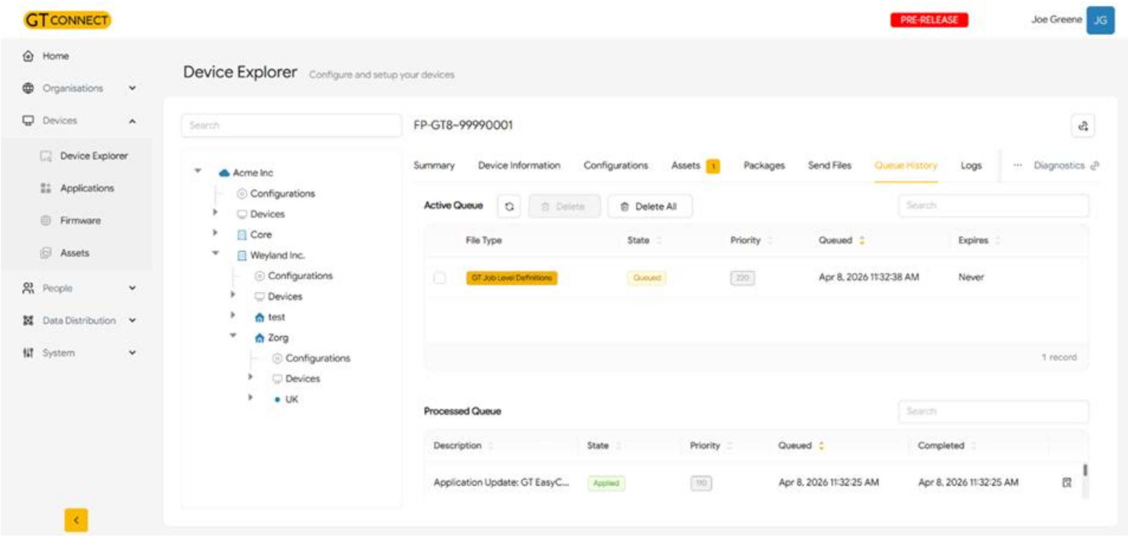


16. Click **Select All** to view all the available options to send to the device: alternatively, select the check box(es) for each item type. On the tab, either click **Send All** to send all the available options to the device or select the check box(es) for the required option(s) and then click **Send Selected**.
17. Click the **Logs** tab to view device modifications/updates.



For more information, see “Logs ” on page 48.

Click the **Queue History** tab to displays what Configuration items are currently queued for the selected device and what items have been sent or failed to be sent.



If the tab is empty, click **Refresh** to retrieve the latest queue data. For more information, see “Queue History ” on page 47.

Chapter 6: Managing People

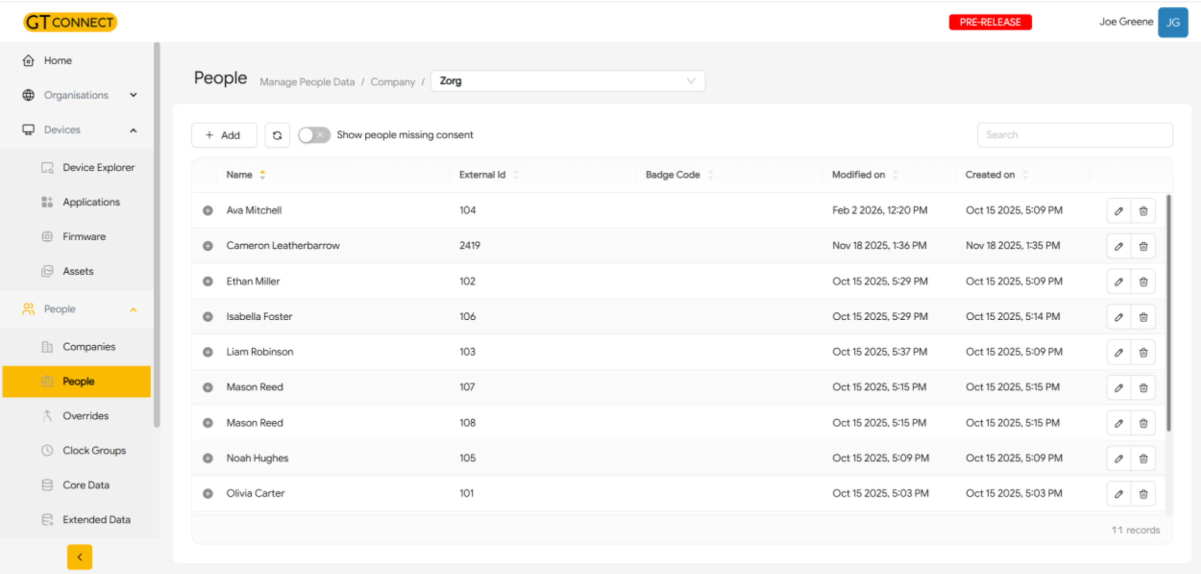
People

This Chapter describes the functionality available from the **People** menu. It includes:

- “Using the People ” on page 75.
- “Managing Clock Groups” on page 76.
- “Managing Employee Accounts” on page 81.

Using the People Page

When you select the **People** menu, the **People** page is displayed. Due to Data Protection laws your view of ‘People data’ is restricted. To view People for a specific Channel-Partner or Company, use the list box and select the required Organisation. The page then refreshes to display the relevant People.



To filter the results to display employees who do not have consent agreements, select **Show people missing consent**. The page then automatically refreshes to display the relevant employees.

By default, the following information for a person is displayed. To help locate a specific person:

- **Name**. The employee’s name.
- **External Id**. The employee’s number.
- **Badge Code**. The number the employee enters on the device to access a location.
- **Roles**. Displays any roles which have been assigned to the employee.
- **Clock Groups**. This is how people are distributed to a device, which is the same as the Advance Distribution functionality in CustomExchange. The number denotes how many devices the employee is enrolled on. For more information on how to assigned to a devices, see “Managing Clock Groups” on page 76.

- **Modified on**. Displays the date and time on which the last modifications to the employee's details were made.
- **Created on**. Displays the date and time the employee was created.

To review details for a person, click ⊕ to expand the view. When you have finished, click ⊖ to minimise the view.

For information on how to manage employees, see ""Managing Clock Groups" on page 76.

Managing Clock Groups

Clock Groups define which People are stored on a specific device. Usually, Clock Groups are created as part of the import system and manage their membership.

Clock Groups can either be:

- **Manually created**. Create, modify and delete your own Clock Groups and then assign the required employees.
- **Automatically created**. Clock Groups can be automatically created as part of the integration and maps employees into the required groups.

In the event you want all employees to be on all devices, you only need to create one Clock Group. Then assign all employees and all clocks to that group.

When all the required Clock Groups have been created you then need to assign devices to the Clock Group, using the **Devices in Clock Group** tab.

For more information, see:

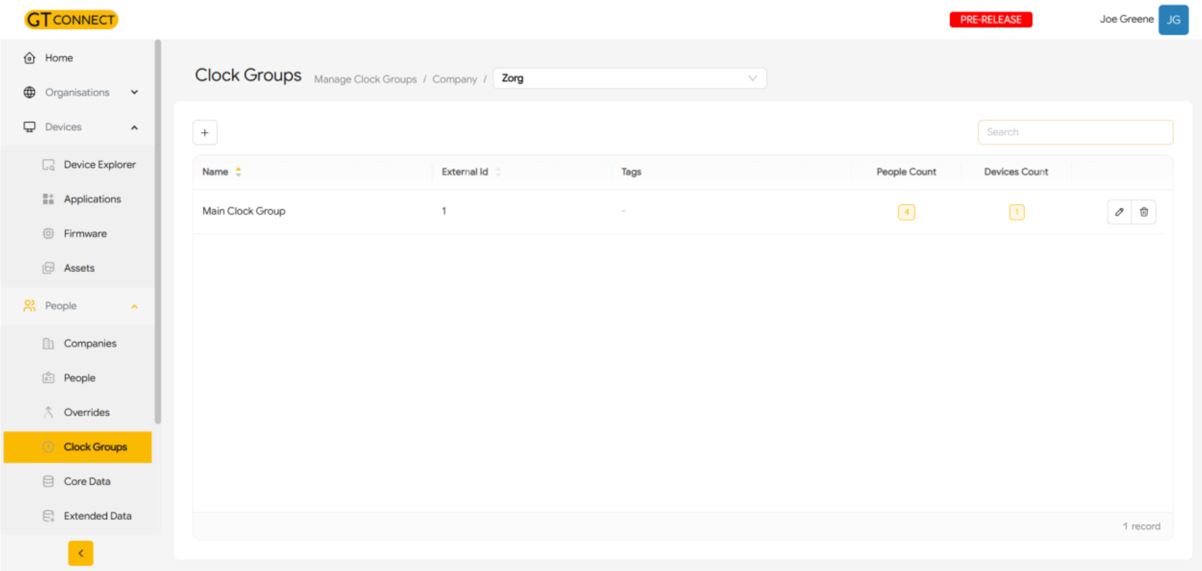
- Creating Clock Groups on page 77
- Modifying Clock Groups on page 78
- Deleting Clock Groups on page 81

Note: Clock groups are often synchronised from a Partner's platform and may overwrite changes made in GTConnect when a regular integration runs.

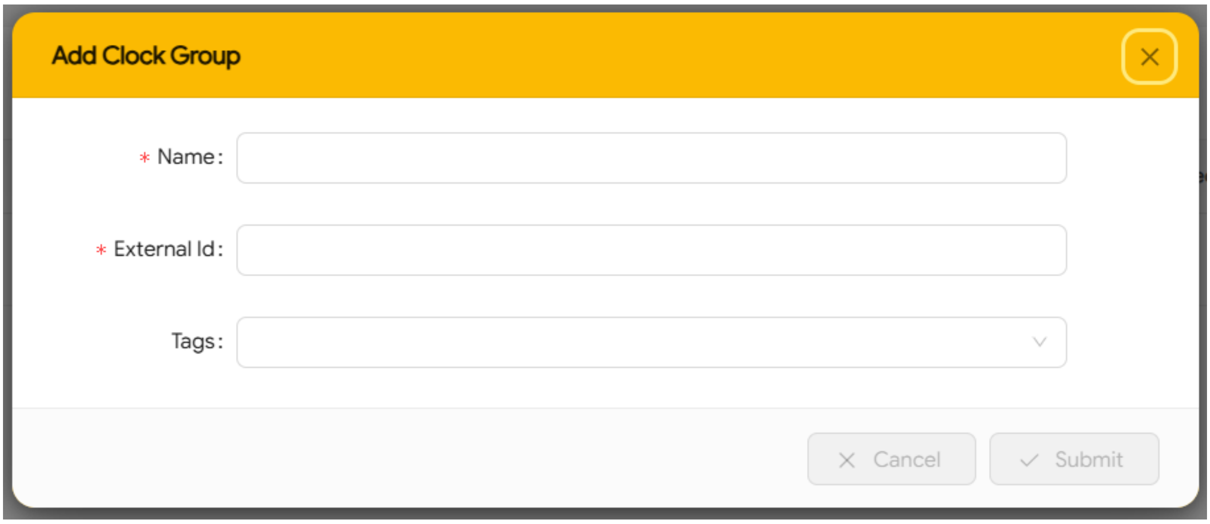
Creating Clock Groups

To create a Clock Group, do the following:

1. Select the **People** menu and click **Clock Groups**.
2. Use the **Clock Groups** list box to select the required Channel-Partner/Company.



3.
4. Click '**+**'.



5. In the **Name** box, enter a description for the Clock Group.
6. In the **External Id** box, enter a reference from the Partner's system.
7. Click **Submit** to commit the Clock Group. Alternatively, click **Close** to abandon the creation of the Clock Group.

Modifying Clock Groups

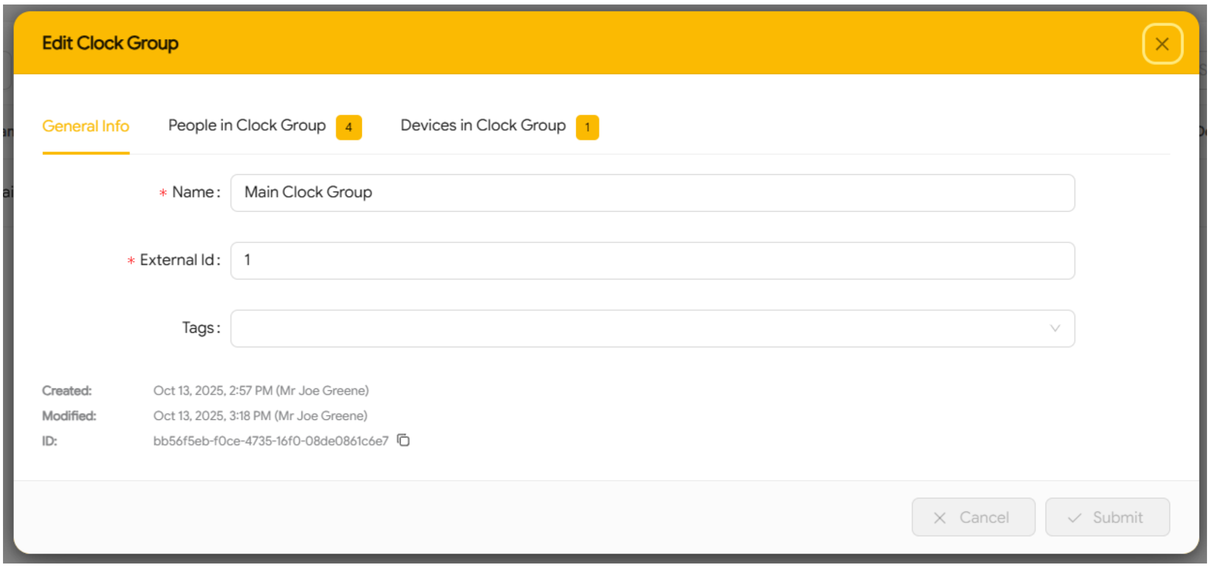
When a Clock Group has been created you can then modify it and assign People and Devices to it. For more information see:

- “Modifying a Clock Group’s Name, Tags and External Id” on page 78.
- “Assigning People to a Clock Group” on page 79.
- “Assigning Devices to a Clock Group” on page 80.

Modifying a Clock Group’s Name, Tags and External Id

To modify a Clock Group’s name and External Id, do the following:

1. Select the **People** menu and click **Clock Groups**.
2. Either double-click the **Clock Group** you want to modify or click **Update**.

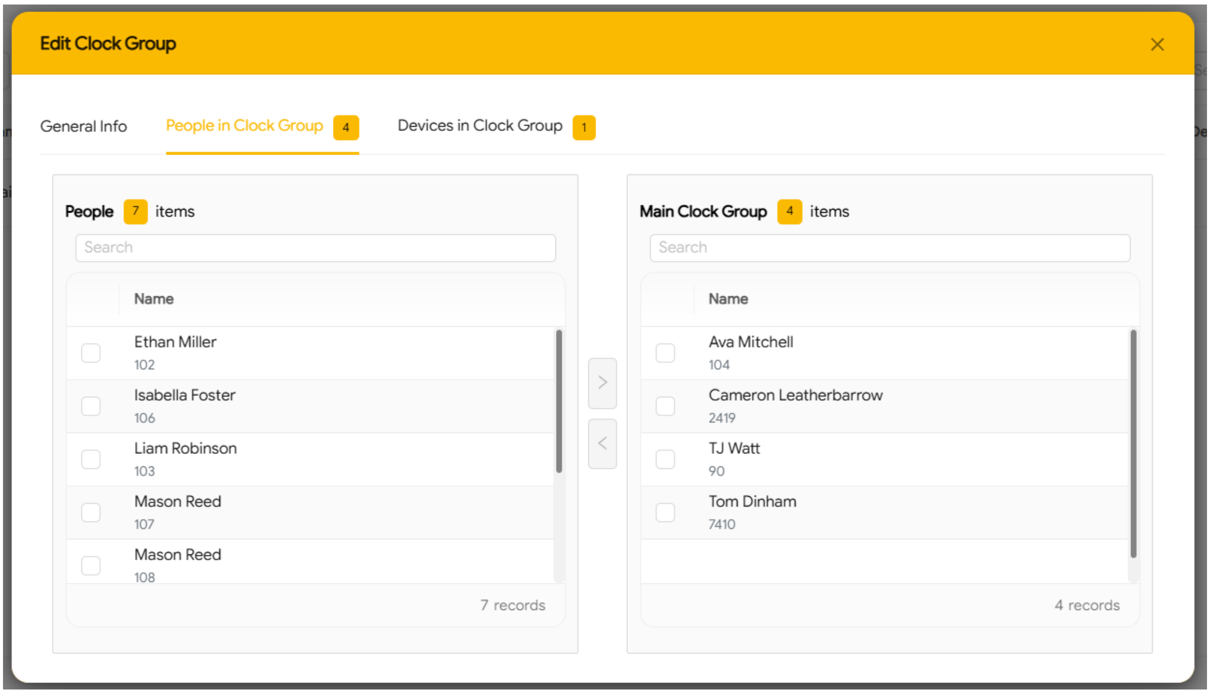


3. Make the required modification(s) to the Group Clock’s name and/or External Id.
4. Click **Submit** to commit the modifications or click **Close** to abandon the modifications.

Assigning People to a Clock Group

To assign employees to a Clock Group's, do the following:

1. Select the **People** menu and click **Clock Groups**.
2. Either double-click the **Clock Group** you want to modify or click **Update**.
3. Click the People in Clock Group tab.

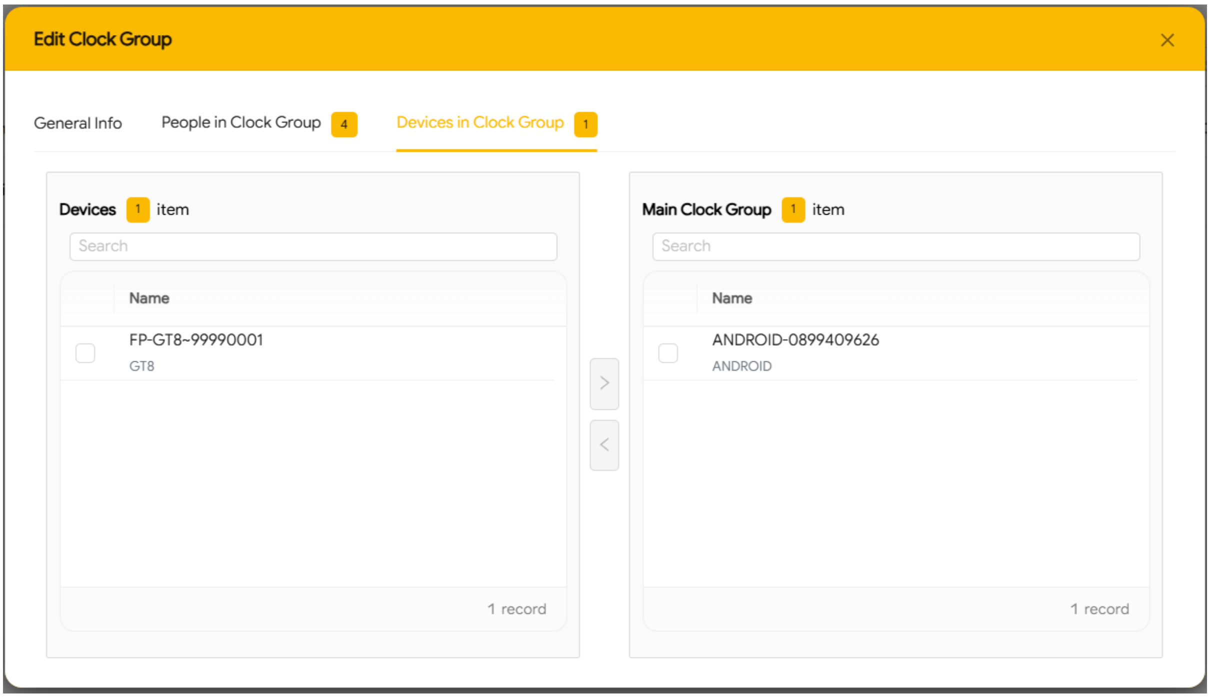


4. From this screen you can tick the employees which you would like to add to the clock group. If you know the name of the employee you want to add, start to enter their name in the Search box. The results will automatically filter to match your entry. Alternatively, to add an employee to the Clock Group, select the person's name in the People column and then click the > right arrow: the employee's name is then moved to the selected Clock Group column.
5. Alternatively, to add all employees to the Clock Group, in the People column, select the check box next to Name, to select all the names. Click > right arrow: the employees' names are then moved to the selected Clock Group column.
6. To remove employees from the clock group enter the employee's name in the Search box, or find the user in the list on the right and click < left arrow. The employee's name is moved back to the People column.
7. To remove all the employees from the Clock Group, in the selected Clock Group column, select the check box next to "name" on the list on the right and click < left arrow: the employees' names are then moved to the People column.
8. Once you are happy with the changes click the "x" on the top right to close the window.

Assigning Devices to a Clock Group

To assign devices to a Clock Group's, do the following:

1. Select the **People** menu and click **Clock Groups**.
2. Either double-click the **Clock Group** you want to modify or click **Update**.
3. Click the Devices in Clock Group tab.



4. From this screen you can tick the devices which you would like to add to the clock group. If you know the name of the device you want to add, start to enter its name in the **Search** box. The results will automatically filter to match your entry. Alternatively, to add an employee to the Clock Group, select the devices' name in the **Devices** column and then click the > right arrow: the device name is then moved to the selected Clock Group column.
5. Alternatively, to add all devices to the Clock Group, in the **Devices** column, select the check box next to **Name**, to select all the names. Click > right arrow: the Devices' names are then moved to the selected Clock Group column.
6. To remove devices from the clock group enter the employee's name in the Search box, or find the device in the list on the right and click < left arrow. The devices' name is moved back to the **Devices** column.
7. To remove all the devices from the Clock Group, in the selected Clock Group column, select the check box next to "name" on the list on the right and click < left arrow: the devices' names are then moved to the **Devices** column.
8. Once you are happy with the changes click the "x" on the top right to close the window

Deleting Clock Groups

When you delete a Clock Group, using the method described here, it doesn't remove the associated devices: that must be completed by a System-User: for more information on how to remove devices, see "Assigning Devices to a Clock Group" on page 80.

To delete a Clock Group, do the following:

1. Select the **People** menu and click **Clock Groups**.
2. Either double-click the **Clock Group** you want to delete or click **Delete**.
3. On the confirmation dialog box, click **Yes** to continue with the deletion or click **No** to abandon the deletion.

Managing Employee Accounts

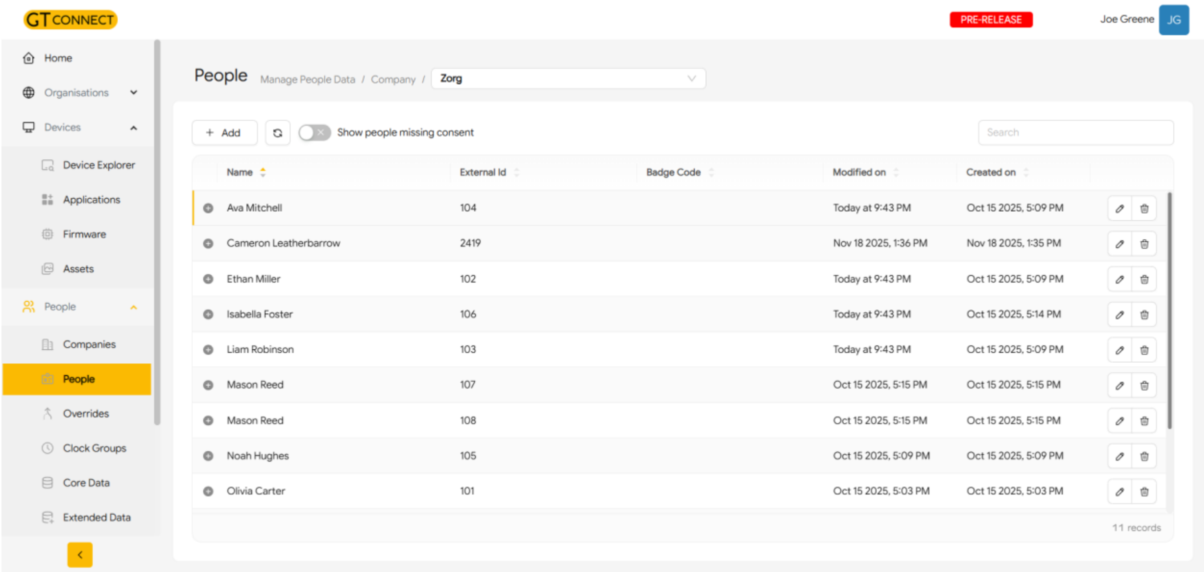
It is a two-part process to create an employee account: first you enter the employee's basic details and then you need to modify the employee account to assign Credentials, Consent Agreements and Clock Groups.

Note: employee's data is usually synchronised from a Partner's platform.

Creating Employee Accounts

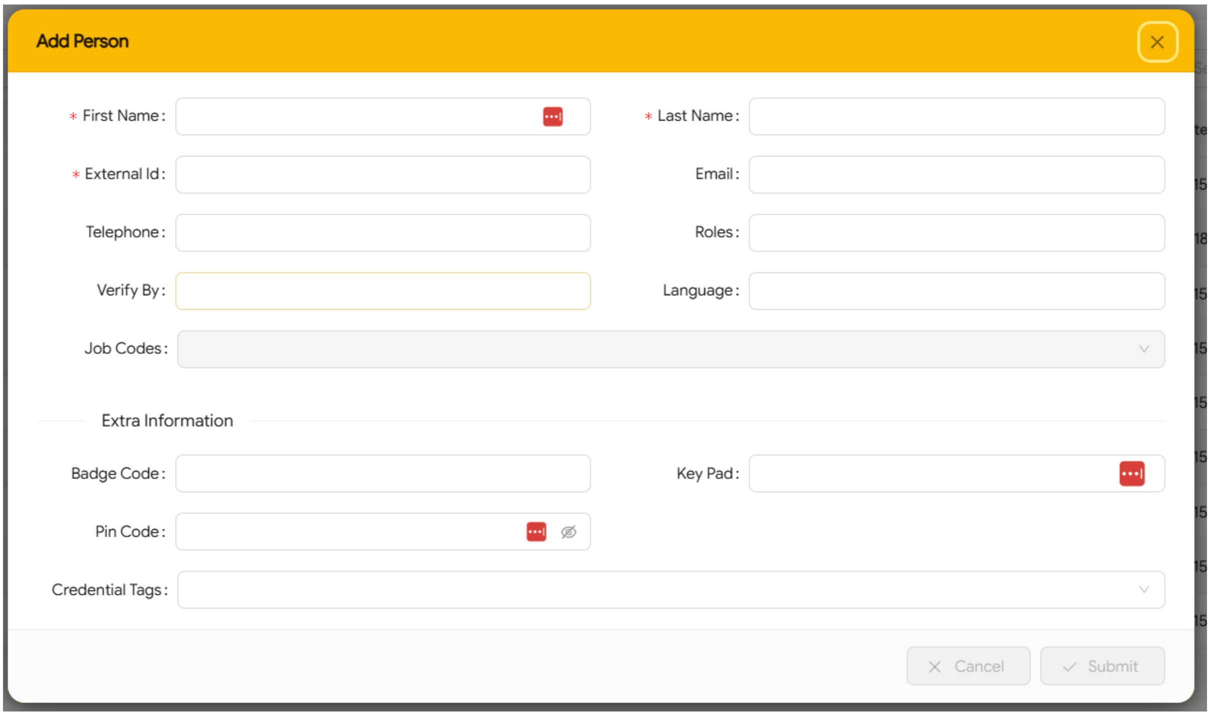
To create an employee account, do the following:

1. Select the **People** menu and click **People**.



2. In the **Company** list box, select the Channel-Partner or Company you want to assign to the employee.

3. Click **Add**.



4. Enter the following information:
    - **First Name**. Enter the employee's first name.
    - **Last Name**. Enter the employee's family name.
    - **External Id**. This ID is from the Partner's system, usually supplied via the import.
    - **Email**. Contact detail for employee
    - **Telephone**. Contact detail for employee
    - **Roles**. Enter the employees roles, which can include 'supervisor' or any other roles to be used by the application.
    - **Verify By**. This is used by the clocks for how a Person can verify their identity on the device.
    - **Language**. Enter the employee's language: that is, the language the device communication should be displayed in.
    - **Job Codes**. **Note**: Job Codes can only be entered when the employee record has been created and then modified: for more information, see Modifying ” on page 85.
    - **Badge Code**. Enter the employee's badge code details.
    - **Key Pad**. Enter the number the employee needs to enter on the device.
    - **Pin Code**. Enter the employee's Personal Identification Number.
    - **Credential Tags.**

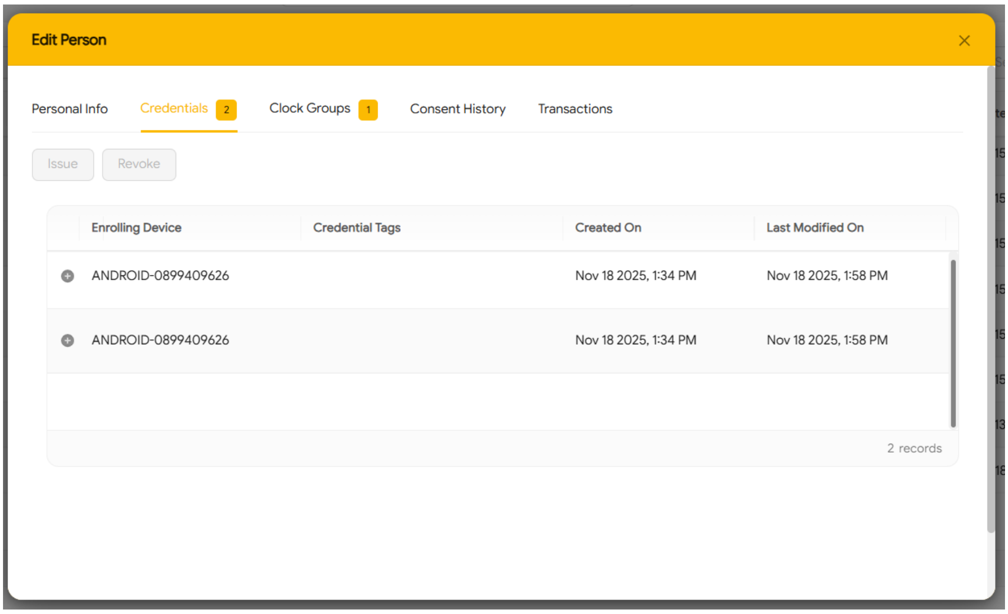
5. Click **Submit** to commit the employee record. When saved, you can then modify the employee record to add:

- Credentials, see “Viewing Credentials of an ” on page 83.
- Clock Groups, see “Assigning People to a Clock Group” on page 79. Alternatively, click **Cancel** to abandon the process.

Viewing Credentials of an Employee Account

To view Credentials of an employee accounts, do the following:

1. Select the **People** menu and click **People**.
2. In the **Company** list box, select the Channel-Partner or Company you want to assign to the employee.
3. Either double-click the employee you want to add Credentials to or click **Update**.
4. Click the **Credentials** tab.

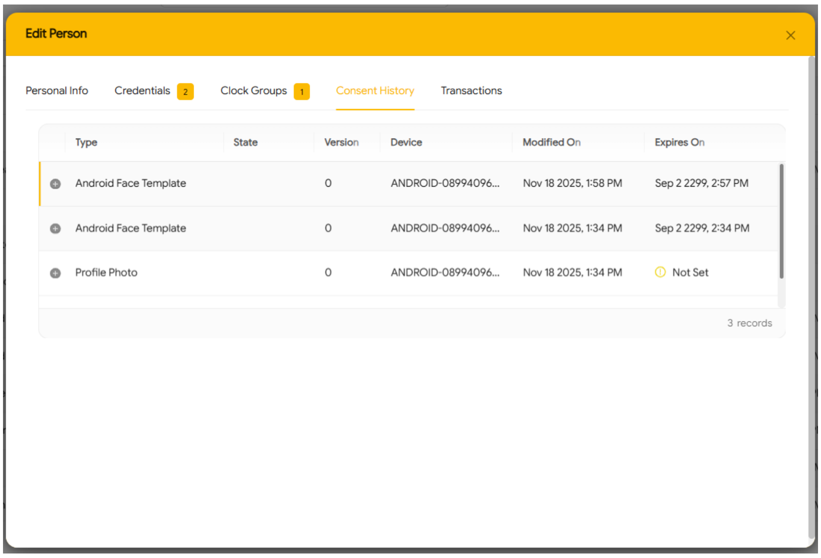


Viewing Consent History of an Employee Account

To view Consent History of an employee account, do the following:

1. Select the **People** menu and click **People**.
2. In the **Company** list box, select the Channel-Partner or Company you want to assign to the employee.
3. Either double-click the employee you want to add consent Agreements to or click Update.

4. Click the Consent History tab.

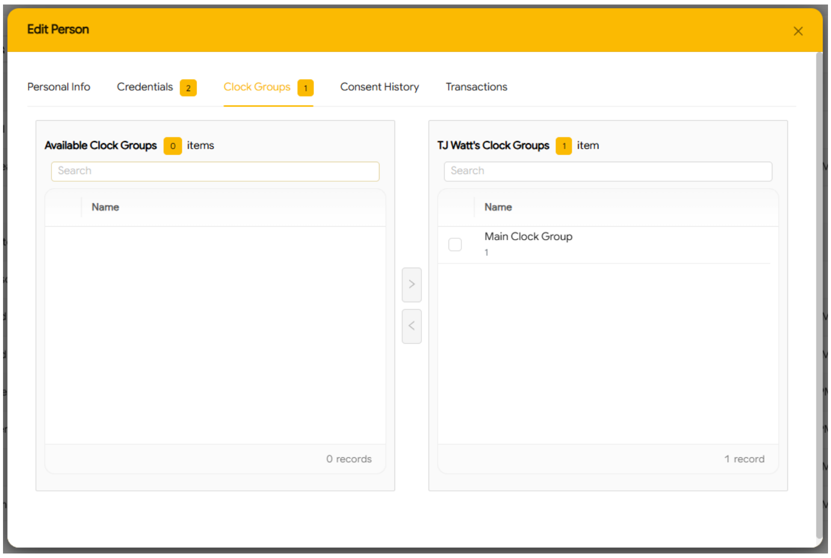


To view who previously created/modified the employee's Consents as well as what the consent text was, click : to hide the details, click .

Adding Clock Groups to Employee Records

To add Clock Groups to employee accounts, do the following:

1. Select the **People** menu and click **People**.
2. In the **Company** list box, select the Channel-Partner or Company you want to assign to the employee.
3. Either double-click the employee you want to add Clock Groups to or click **Update**.
4. Click the **Clock Groups** tab.



To view who previously created/modified the employee's Clock Groups, click : to hide the details, click .

5. To assign the employee to a Clock Group, use the list box to select the required device.
6. Click **Add**.

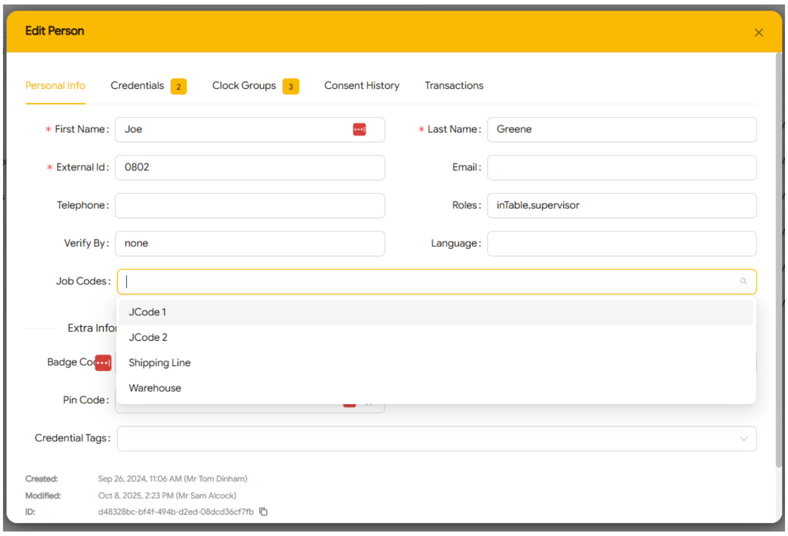
The employee is then automatically added to the Clock Group.

If an employee is added to a Clock Group in error, click **Delete**. On the confirmation dialog box, click **Yes** to continue with the deletion or click **No** to abandon the deletion.

Modifying Employee Accounts

To modify an employee account, do the following:

1. Select the **People** menu and click **People**.
2. In the **Company** list box, select the Channel-Partner or Company you want to assign to the employee.
3. Either double-click the employee to or click **Update**.
4. Either double-click the employee you want to add consent Agreements to or click Update.
5. To add a Job Code for the employee, on the **Personal Info** tab, in the **Job Codes** box, click to view all the available codes.



6. Select the required code. You can assign multiple Job Codes: to do this, repeat the selection process using the list box.
7. Make any other modifications, as required.
8. Click **Submit** to commit the modifications or click **Close** to abandon the modifications.

Deleting Employee Accounts

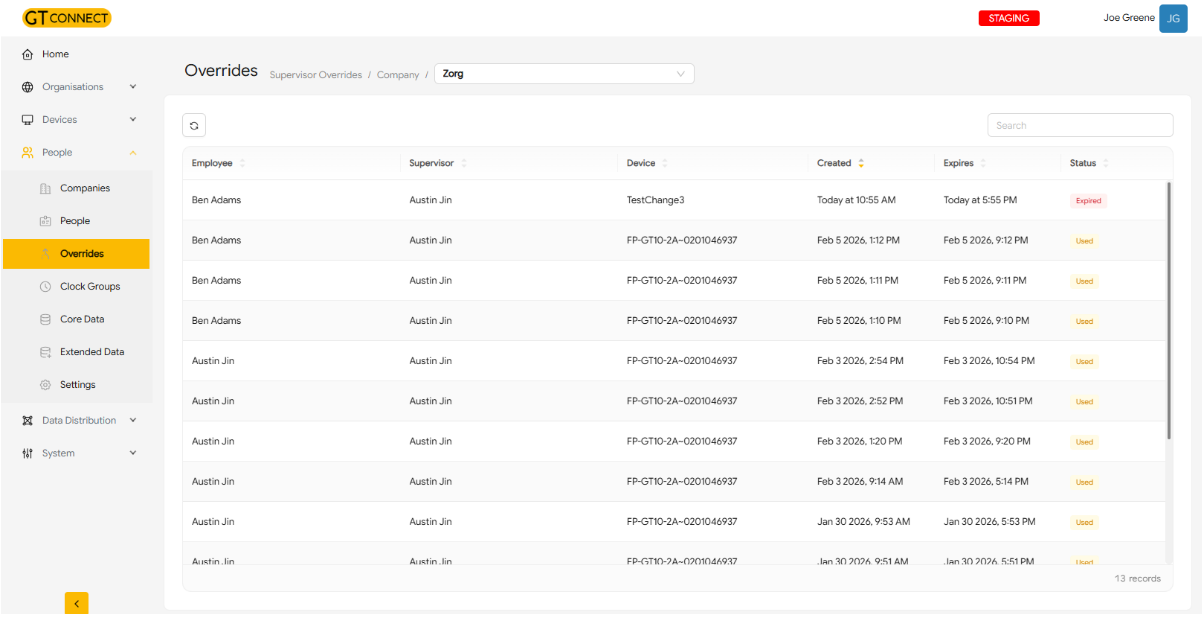
To delete an employee account, do the following:

1. Select the **People** menu and click **People**.

2. In the **Company** list box, select the Channel-Partner or Company you want to remove.
3. Click **Delete**.
4. On the confirmation dialog box, click **Yes** to continue with the deletion or click **No** to abandon the deletion.

Overrides

As Easy Clock can support punch restrictions, we now track supervisor overrides on the server, for audit and compliance purposes.



Each instance of a supervisor override will show it’s state (active/used/expired) and on which device the request originated, who requested it (the supervisor) and for who.

Notifications of supervisor override creation and use can be sent through the Data Distribution systems to a third party.

Chapter 7: Data Distribution

Data Distribution

This Chapter describes how to manage all the functionality available from the Data Distribution menu. It includes:

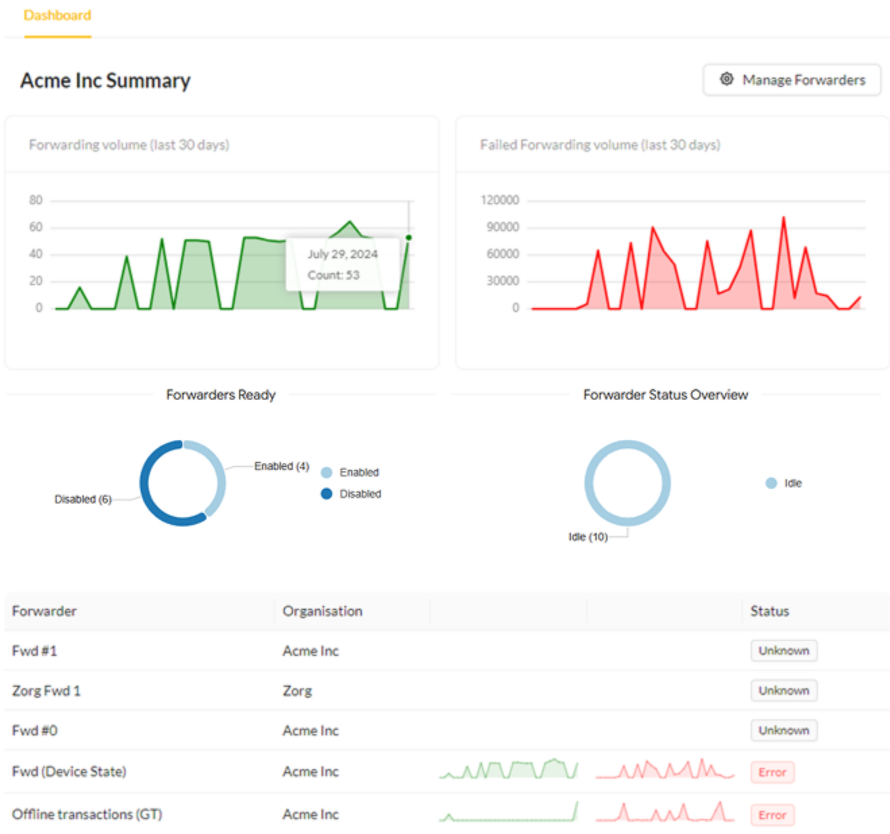
- “Transaction ” on page 87.
- “Server Actions” on page 93.
- “Managing Direct Data” on page 96.

Transaction Forwarding

Use the Forwarder to specify which transactions are sent either as a HTTP Forwarder or a Service Bus Forwarder. Transaction Forwarders are attached to a Partner, Channel-Partner or Company using a **Forwarders** synthetic node.

Viewing Forwarders Dashboard

When selecting “forwarder”, you will now see a new view has been added to provide visibility about which Forwarders are active and which are encountering problems.

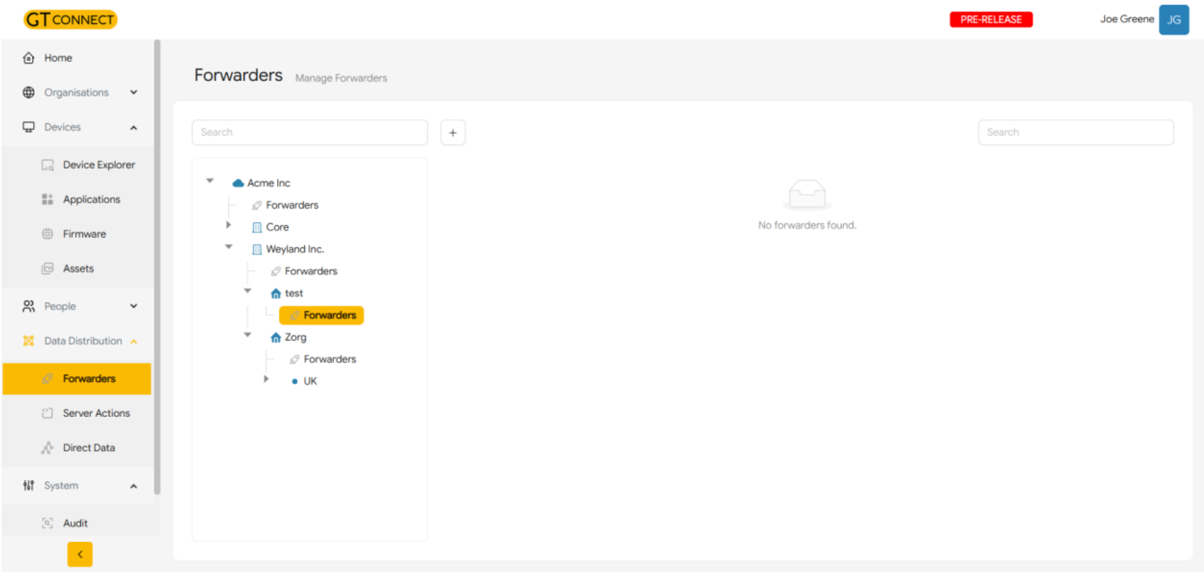


Creating Transaction Forwarding Synthetic Nodes

Forwarders are used to forward transactions to a third party system (such as a HR system) for processing. Once a transaction is received from a clock by GTConnect, it will locate its position in the tree & walk up the tree towards the root, checking every node along the way if there is a forwarder on the node. If there is, it will evaluate the conditions set on the forwarder, if they match a copy of the transaction is dispatched to that forwarder; the process then continues to the parent node until it reaches the root. A node may have multiple forwarders that match that transaction. In that case a copy is sent to each.

To create a Forwarder, do the following:

1. On the Data Distribution menu, select Forwarder.
2. On the Organisation hierarchy, select the required Partner, Channel-Partner or Company.

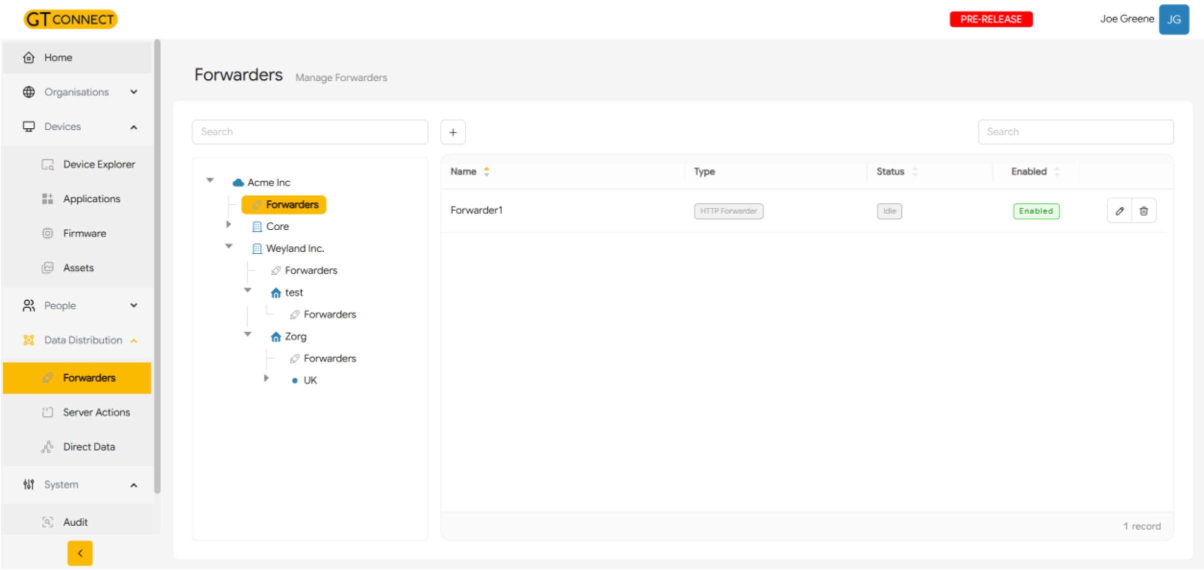


3. Click Add Forwarder.
4. Click **Add**. To display the **Add Forwarder** dialog box. For more information, see Creating Forwarders on page 89.

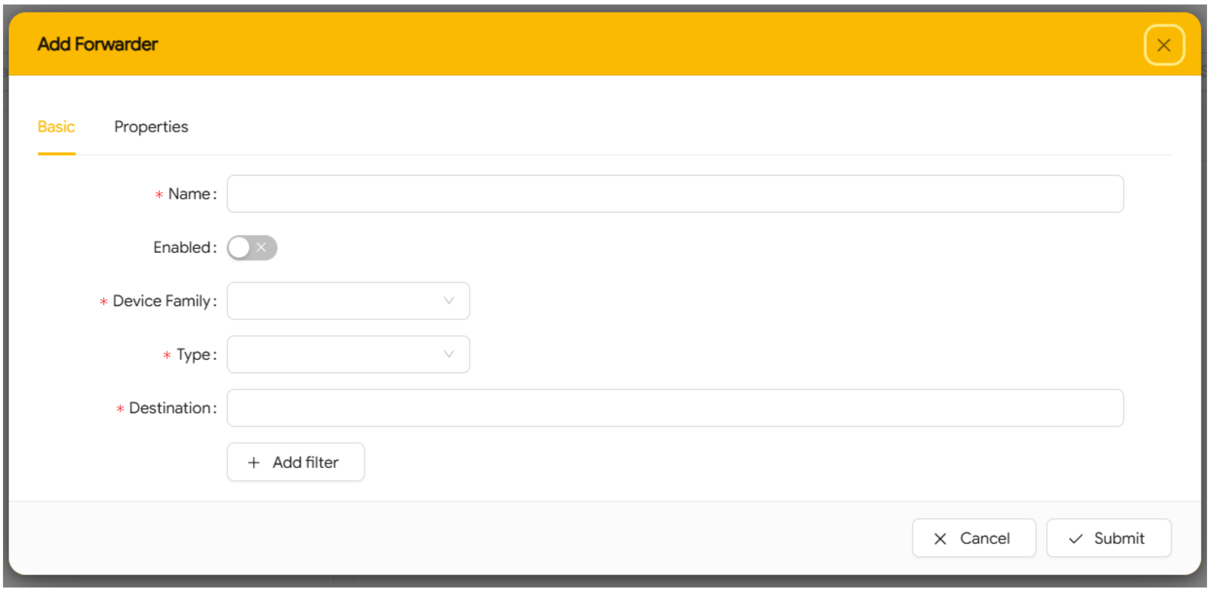
Creating Forwarders

To create a transaction Forwarder, do the following:

1. On the Data Distribution menu, select Forwarder.
2. On the Organisation hierarchy, under the required Partner, Channel-Partner or Company, click Forwarders.



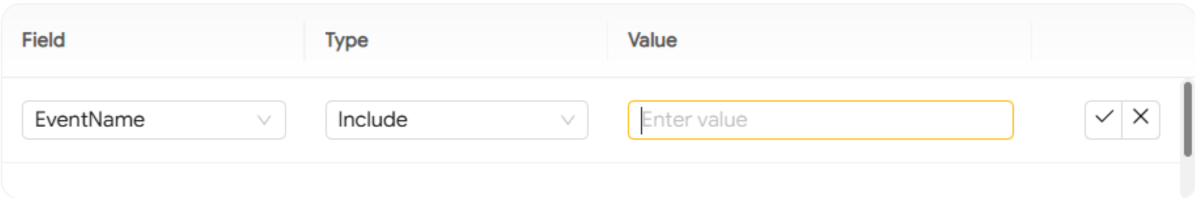
3. Click Add.



4. Enter the following information:

- **Name**. Enter a description for the Forwarder.
- **Enabled**. To activate the Forwarder, move the slider to the right , so that it is selected.
- **Device Family**. Use the list box to select the required device type: for example, GT Clock.
- **Type**. Use the list box to select the method by which transaction will be sent: for example, Service Bus Forwarder.
- **Destination**. Enter either:
    - **Http Forwarder type**. Enter a valid URL.
    - **Service Bus Forwarder type**. Enter a valid Service Bus Endpoint.

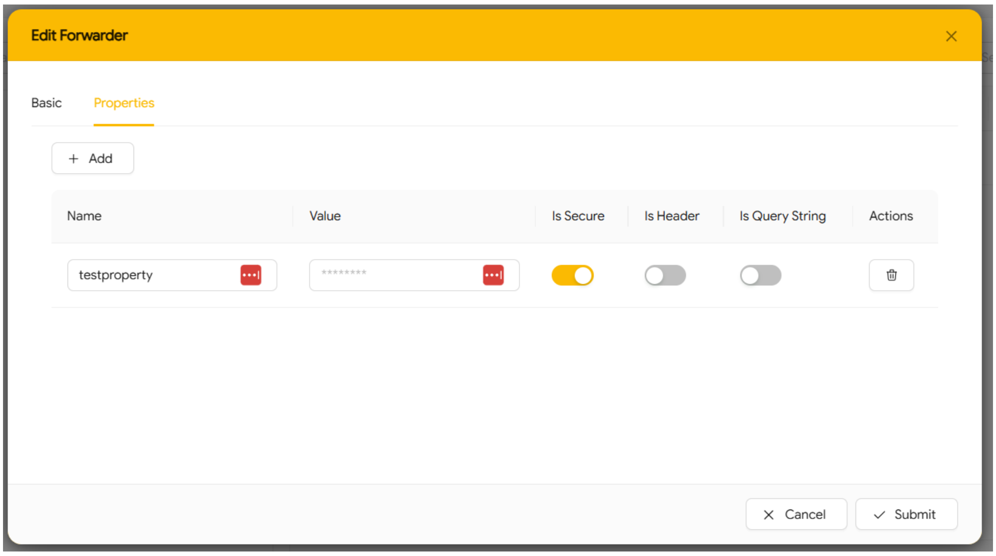
5. To specify the Event Name and/or Source Type, Type and Value, click **Add a filter** to display additional functionality:



6. Enter the following information:
    - **Field**. Use the list box to select either **EventName** or **SourceType**.
    - **Type**. Use the list box to select **Include** or **Exclude** to specify whether you want to send or omit specific transactions.
    - **Value**. This is a free text box, enter either a value from EventName or SourceType: for example, if you create an EventName filter, you can pick a value of Transaction to filter just on transaction events.

7. Click ✓ tick to commit the Filter or click ✕ cross to abandon the Filter.

8. Click on properties to add advance forwarder properties. Properties can be configured to be included in the HTTP header or query string and if the data should be treated as secure (such as an API key). All properties will be included in the message application properties for service bus forwarders.



9. To add a forwarder property click "Add"
10. Enter the advanced properties
    - **Name:** Name of the property that is being added
    - **Value:** Value that the property should have
    - **Is Secure:** When ticked, hides the value from the UI
    - **Is Header:** Sets the name and value as part of the HTTP Headers
    - **Is Query String:** Sets the name and value as part of the URL
11. Click on the delete button to delete any forwarder properties if required
12. Click **Submit** to commit the Forwarder or click **Cancel** to abandon the Forwarder.

Activating/Deactivating Transaction Forwarding

When transaction forwarding has been set up you can either activate a Forwarder or de-activate one, if it is temporarily not required.

Activating Transaction Forwarders

To activate a Forwarder, do the following:

1. On the Data Distribution menu, select Forwarder.
2. On the Organisation hierarchy, under the required Partner, Channel-Partner or Company, click **Forwarders**.
3. Either double-click the Forwarder you want to modify or click **Update**.
4. To activate the Forwarder, move the slider so that it is selected and a tick is displayed .
5. Click **Submit** to commit the activation or click **Cancel** to abandon activation.

De-activating Transaction Forwarders

To de-activate a Forwarder, do the following:

1. On the Data Distribution menu, select Forwarder.
2. On the Organisation hierarchy, under the required Partner, Channel-Partner or Company, click **Forwarders**.
3. Either double-click the Forwarder you want to modify or click **Update**.
4. Move the slider so that a cross is displayed .
5. Click **Submit** to commit the de-activation or click **Cancel** to abandon de-activation.

Modifying Forwarders

To modify a Forwarder, do the following:

1. On the Data Distribution menu, select Forwarder.
2. On the Organisation hierarchy, under the required Partner, Channel-Partner or Company, click **Forwarders**.
3. Either double-click the Forwarder you want to modify or click **Update**.
4. On the **Edit Forwarder** dialog box, make the required modifications.
5. If you need to modify a filter, click **Update**. Make the required modifications and
6. then click tick to commit the Filter modifications or click cross to abandon the Filter.
7. Click on "properties" and edit any properties that need to be modified
8. Click **Submit** to commit the Forwarder or click **Cancel** to abandon the Forwarder.

Deleting Forwarders

To delete a Filter assigned to a Forwarder, do the following:

1. On the Data Distribution menu, select Forwarder.
2. On the Organisation hierarchy, under the required Partner, Channel-Partner or Company, click **Forwarders**.
3. Either double-click the Forwarder you want to delete the Filter from or click
4. Update.
5. To delete the Filter, click **Delete**. On the confirmation dialog box, click **OK** to commit the deletion or click **Cancel** to abandon the deletion.
6. Click **Submit** to commit the Forwarder or click **Cancel** to abandon the Forwarder.

To delete a Forwarder, do the following:

1. On the Data Distribution menu, select Forwarder.
2. On the Organisation hierarchy, under the required Partner, Channel-Partner or Company, click **Forwarders**.
3. Click **Delete**.
4. On the confirmation dialog box, click **Yes** to continue with the deletion or click **No** to abandon the deletion.

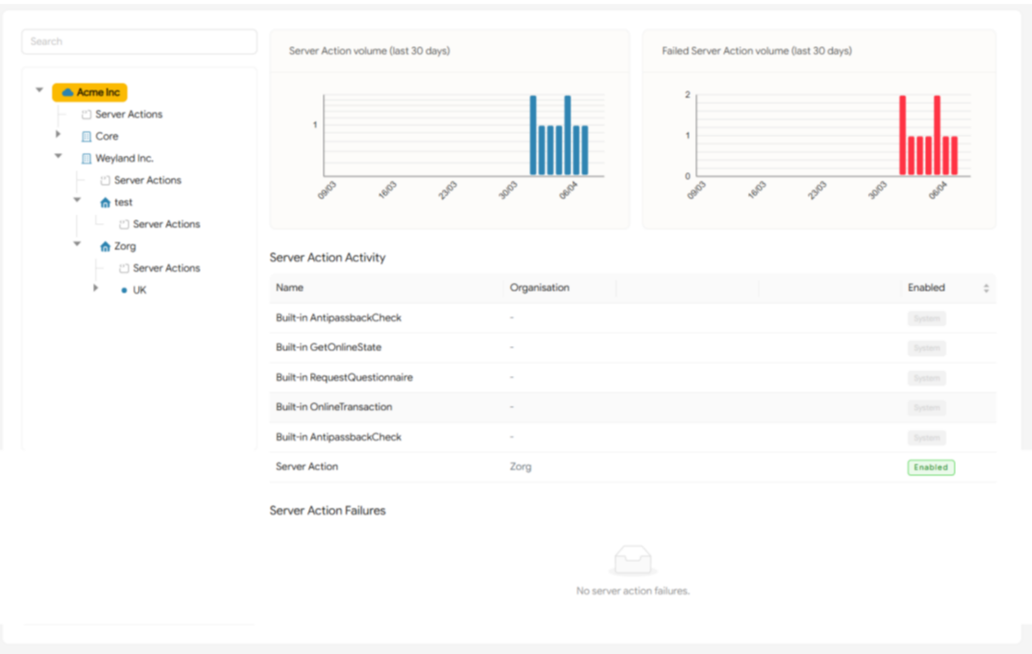
Server Actions

GTConnect can act as a proxy when a device needs information. For example, where schedules need to be fetched. A URL is received and a call request is then made to the platform which is then relayed back to the device. This avoids any unnecessary/unknown or untrusted endpoints.

When clicking on server-actions, you will be shown a view which provides visibility on which server actions are active and which are encountering problems. This view will also highlight the built-in Server-Actions that GTConnect provides.

A new view has been added to provide visibility on which server actions are active and which are encountering problems.

This view also highlights the built-in Server-Actions that GTConnect provides.

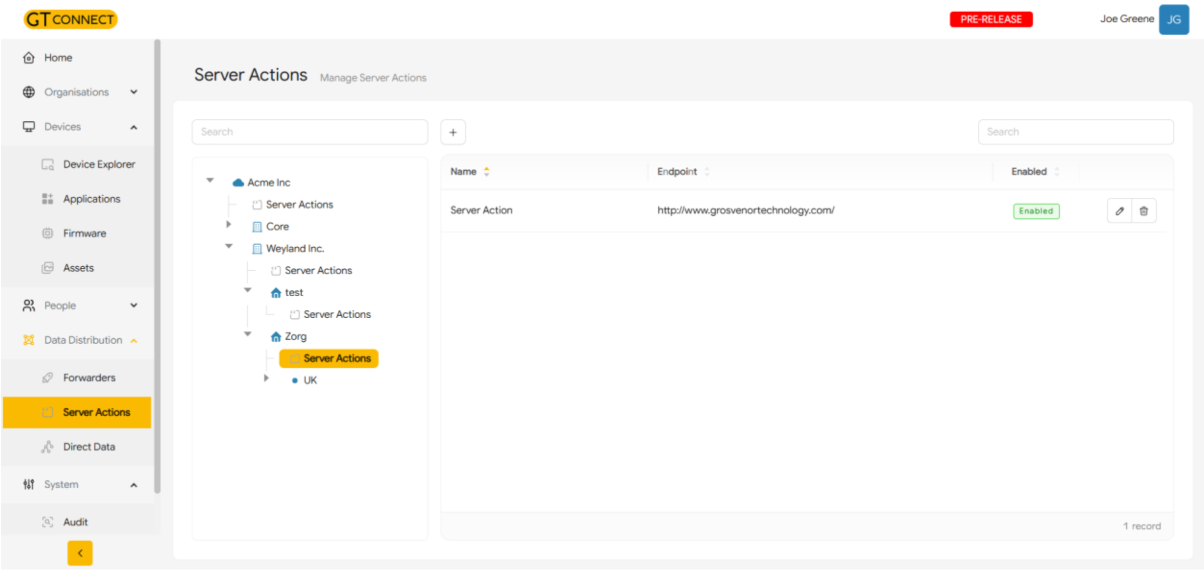


Creating Server Actions

Create Server Actions to determine trusted Actions which can allow data transfers to devices.

To create Server Actions, do the following:

1. On the Data Distribution menu, select Server Actions.

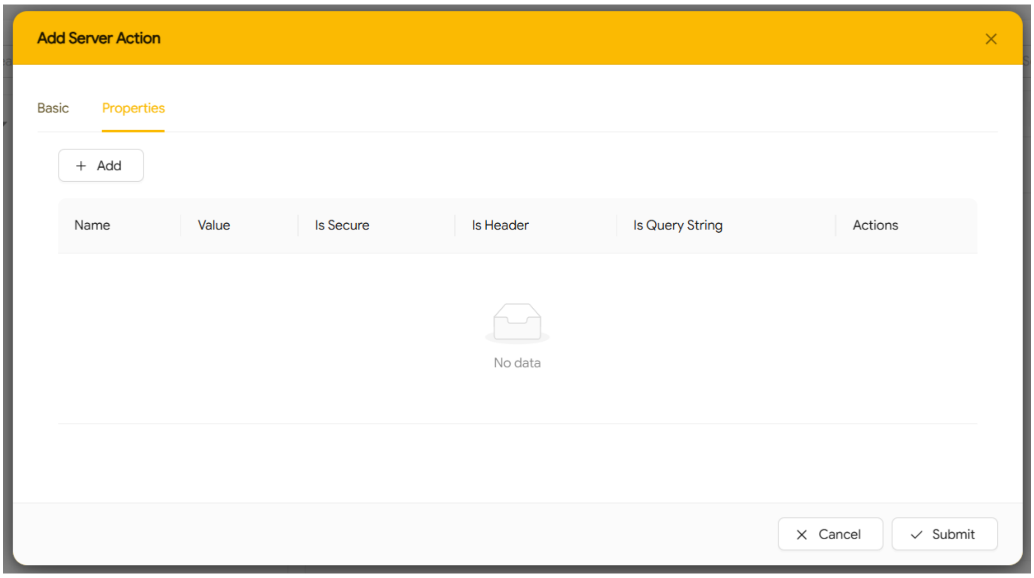


2. Click **Add**

3. Enter the following information:
   - **Name**. Enter a description for the Server Action.
   - To activate the Server Action, make sure the slider displays a tick .

- In the **Endpoint** box, enter the URL to which data can be received from the Server Action, acting as a conduit for the request, from the device.
- **Payload Type:** This allows you select whether the contents of the transaction will be XML or JSON (when XML is selected, the contents of the transaction will remain in a JSON string, but the outer wrapper is now JSON.

4. Click on properties to add advance server action properties. Properties can be configured to be included in the HTTP header or query string and if the data should be treated as secure (such as an API key).



5. To add a forwarder property click "Add"
6. Enter the advanced properties
    - **Name:** Name of the property that is being added
    - **Value:** Value that the property should have
    - **Is Secure:** When ticked, hides the value from the UI
    - **Is Header:** Sets the name and value as part of the HTTP Headers
    - **Is Query String:** Sets the name and value as part of the URL
7. Click on the delete button to delete any forwarder properties if required
8. Click **Submit** to commit the Server Action or click **Cancel** to abandon the creation of the Server Action.

Activating Server Actions

To activate a Server Action, do the following:

1. On the Data Distribution menu, select Server Action.
2. On the Organisation hierarchy, select the required Partner, Channel-Partner or Company.
3. Either double-click the Server Action you want to modify or click **Update**.
4. To activate a Server Action, move the slider so that it is selected and a tick is displayed .
5. Click **Submit** to commit the activation or click **Cancel** to abandon activation.

De-activating Server Action

To de-activate a Server Action, do the following:

1. On the Data Distribution menu, select Server Actions.
2. On the Organisation hierarchy, select the required Partner, Channel-Partner or Company.
3. Either double-click the Server Action you want to modify or click **Update**.
4. Move the slider so that a cross is displayed .
5. Click **Submit** to commit the de-activation or click **Cancel** to abandon de-activation.

Modifying Server Actions

To modify Server Actions, do the following:

1. On the Data Distribution menu, select Server Actions.
2. On the **Server Actions** page, click **Update**.
3. On the **Edit Server Actions** dialog box make the required modifications to the Server Action.
4. Click on "properties" and edit any properties that need to be modified
5. Click **Submit** to commit the Server Action or click **Cancel** to abandon the modifications.

Deleting Server Actions

To delete Server Actions, do the following:

1. On the Data Distribution menu, select Server Actions.
2. On the **Server Actions** page, click **Delete**.
3. On the confirmation dialog box, click **Yes** to continue with the deletion or click **No** to abandon the deletion.

Managing Direct Data

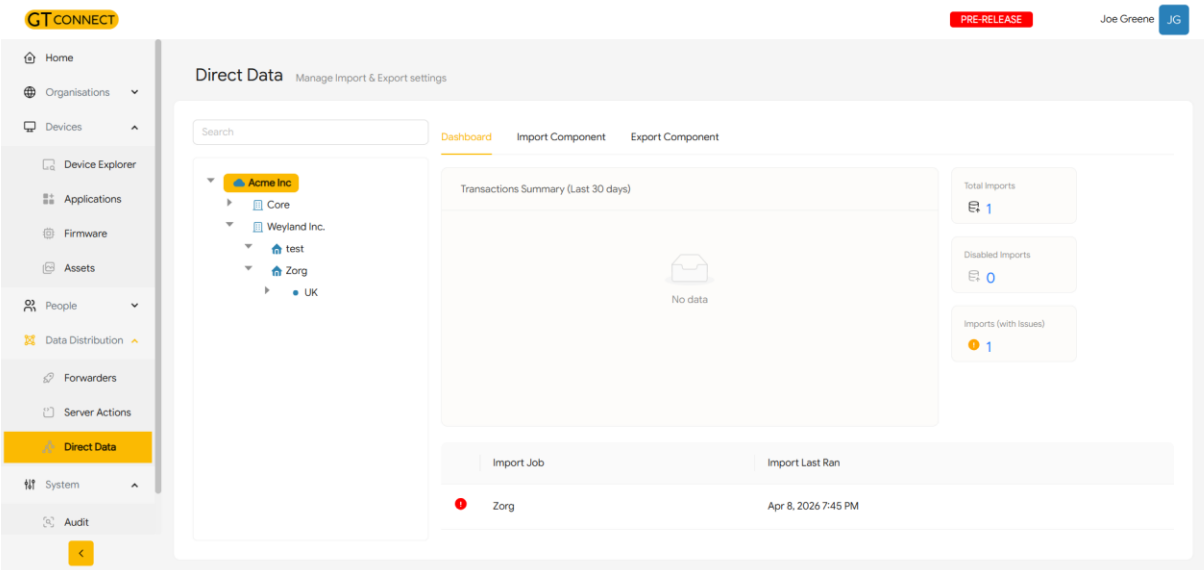
Direct Data allows you to view details about the integration with a Partner's platform and the flow of data back and forth. Should you encounter any issues, the information provided will assist your Support Team to identify and resolve the issue.

At Partner level, an Import Component needs to be specified. This Import Component is an application that is typically written by Grosvenor Technology's Professional Services Team and is connected to the Partner, as the owner of the platform integration.

For each Company you can then specify an Import Agent and an Export Agent:

- An Import Agent configuration is all the settings necessary to talk to the Partner platform for the selected Company. For more information, see "Setting up the Import Agent" on page x.
- An Export Agent configuration is the same as the Import Agent, except that the configuration connection to the application running the Export is specified at Company level and as a service bus. This is to allow configuration per company to be flexibly routed as required. For more information, see Setting up the Import Agent on page 98.

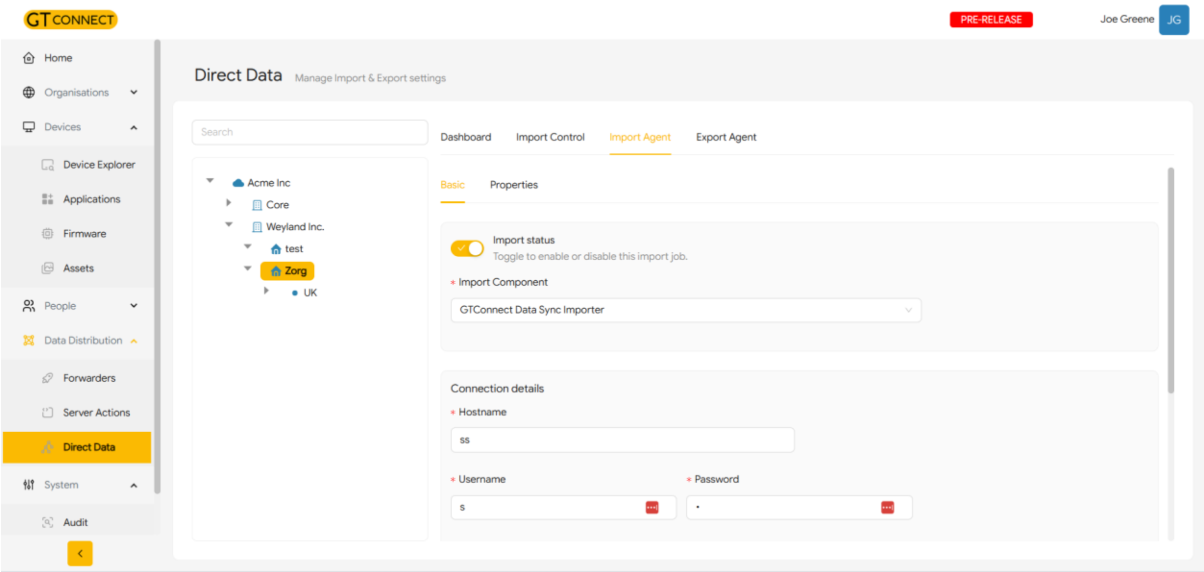
Each Channel-Partner and Company has its own dashboard view in Direct Data. To display a Company’s Direct Data dashboard, select the **Direct Data** menu and use the Organisation hierarchy to select the required Company.



This provides information about each execution of the Agent. To view details for any data entry, click the required item and a breakdown is automatically displayed, along with the item’s status, which includes successes, errors and warnings.

Setting up the Import Agent

Use the **Import Agent** tab to setup Import Agent parameters. To display the **Import Agent** tab, select the **Data Distribution** menu and click **Direct Data**. Use the Organisation hierarchy to select the required Channel-Partner or Company and then click the **Import Agent** tab:

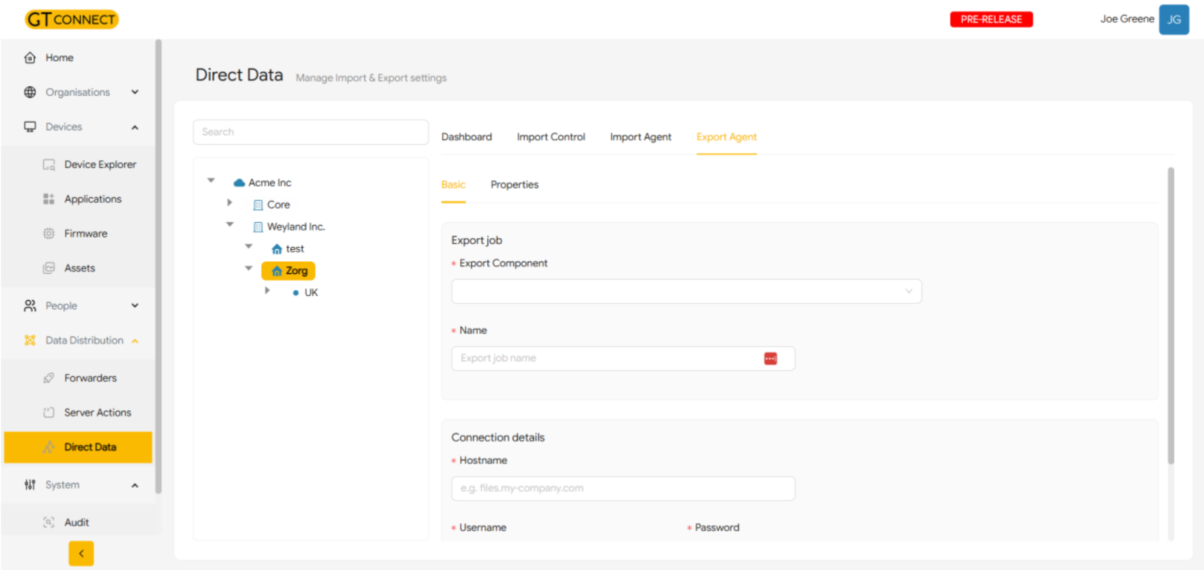


- **Import Status:** If set to false, this imports from being executed for the Channel-Partner or Company. Imports are scheduled based on the frequency interval, that is, run an import for data every four hours. If set to de-activate, this import won't occur.
- **Import Component:** This is where you select the valid Import Component for your use case
- **Hostname**: This is the unique value or location from the Partner that differentiates this Channel-Partner or Company when making requests to the Partners platform. Typically, this is a value that then gets used in the Import Agent to make requests to the Partner.
- **Username:** The Partner platform has security specific to this company - the username is from them to authenticate on the Partner platform.
- **Password:** The password is from them to authenticate on the Partner platform.
- **Frequency Interval**: Frequency of the import being ran in minutes. In addition, shown here will be the next planned run of the import agent on that schedule **Note**: we recommend that you do not make any modifications to this setting.
- **File Exclusions:** Comma separated list of core & extended data types to be filtered out of the data import
- Properties can be added in the creation of the Import Component by clicking **"properties"**. The property names are dictated by the import component, however you can set the value of them and whether they are secure

Click **Submit** to commit the Import Agent setup.

Setting up the Export Agent

Use the **Export Agent** tab to setup Export Agent parameters. To display the **Export Agent** tab, select the **Data Distribution** menu and click **Direct Data**. Use the Organisation hierarchy to select the required Channel-Partner or Company and then click the **Export Agent** tab:



- **Export Component:** This is where you select the correct Export Component for your use case
- **URI:** This URI is the endpoint that will be used to convey transactions/information to the remote PS component for the Partner. Typically, this is a service bus, but it could be something else as required from the Partner.
- **Name:** A unique name to differentiate this instance of the Export Agent attached to this node.
- **Hostname**. The unique remote ID from the Partner for a Company.
- **Username**. This is used to authenticate to deliver into the Partner platform.
- **Password**. The password is used to authenticate to deliver into the Partner platform.
- Properties can be added in the creation of the Export Component by clicking **"properties"**
- The property names are dictated by the export component, however you can set the value of them and whether they are secure

Click **Submit** to commit the Import Agent setup.

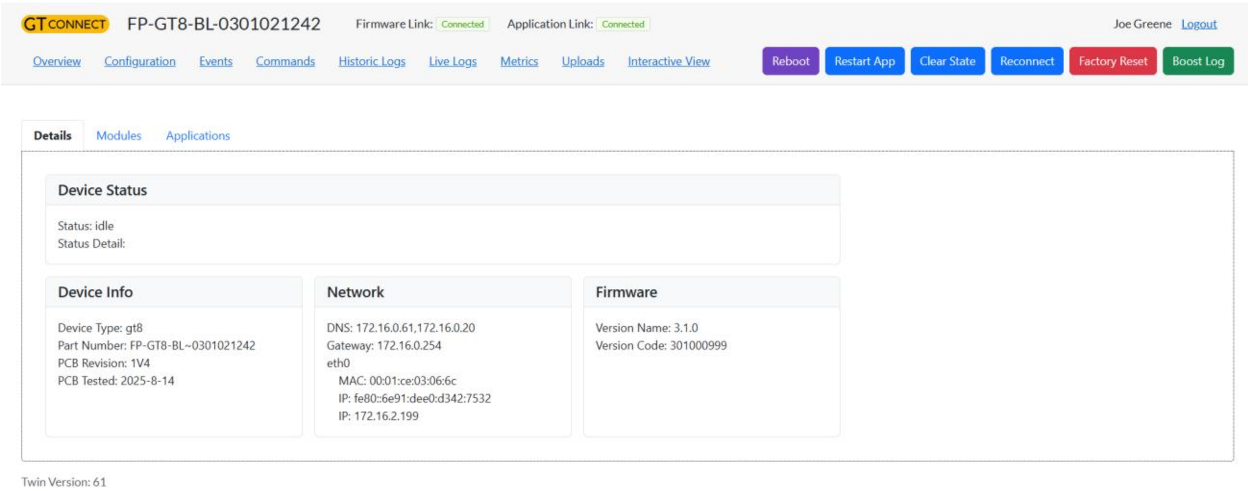
Chapter 8: Diagnostics

Managing Device Diagnostics

Note: only experienced Support staff should use the device diagnostic area.

From the **Device Summary** page you can view comprehensive information about a device, as long as it has the new GTConnect firmware activated, that it, **IoT Enabled** is displayed on the **Device Summary** page.

To view Diagnostic information for a specific device, select the **Devices** menu and then click **Device Summary**. Use the **Select Device** list box to identify the required device and click **Diagnostics**.



Note: if you go to this view with an older device a message is displayed informing you that you need to upgrade.

At the top of the page, the following buttons are available:

- **Reboot**. Click to reboot the device.
- **Restart App**. Click to restart an Application on the device.
- **Clear State.** Click to remove all configuration/application/firmware from the device.
- **Reconnect**. If a device is Offline, click **Reconnect** so that it becomes Online and visible within GTConnect.
- **Factory Reset**. Click if the device needs to be reset to the original default settings.
- **Boost Log**. Increases what is logged by a device, for an hour, so you can see in more detail what it is doing.

The following menus are available:

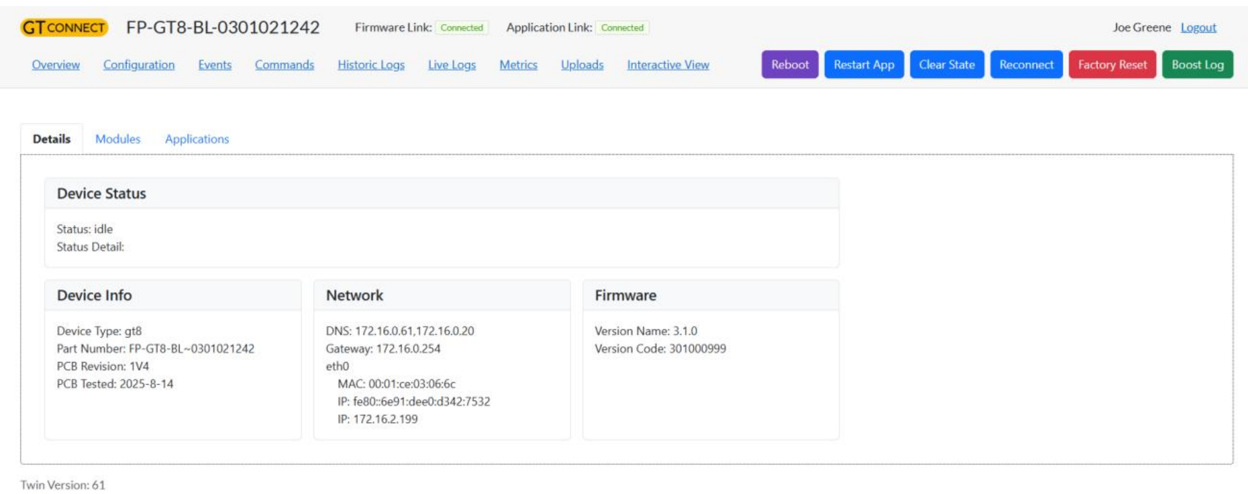
- **Overview**: for more information, see "Overview " on page 112.
- **Configuration**: for more information, see "Configuration " on page 104.
- **Events**: for more information, see "Events " on page 106.
- **Commands:** for more information, see "Commands Menu" on page 107.
- **Historic Logs**: for more information, see "Historic Logs " on page 108.
- **Live Logs**: for more information, see "Live Logs Menu" on page 109.
- **Uploads**: for more information, see "Uploads Menu" on page 111.
- **Interactive View**: for more information, see "Interactive View " on page 112

Overview Menu

- Click the **Overview** menu to view the:
- **Details** tab. This tab displays an overview about the device: for more information, see page 101.
- **Modules** tab. This tab displays information about the modules which have been installed on the device: for more information, see page 102.
- **Applications** tab. This tab displays which Applications are installed on the device: for more information, see page 104.

Details Tab

When you click **Diagnostics** from the **Device Summary** page, the **Details** tab is displayed by default.



Device Status

This section displays whether the device is active or in an idle state. If additional information is available, it is displayed in the **Status Detail** section.

Device Info

The following information is displayed about the device:

- **Device Type**: for example, GT8, GT10, and so on.
- **Part Number**. The device's unique identification number.
- **PCB Revision**. The PCB version number.
- **PCB Tested**. The date on which the PCB was tested, in the format: YYYY-M-D.

Network

The following information is displayed about the device's network settings:

- **DNS**: the Domain Name Server Address.
- **Gateway**: the Gateway IP Address.

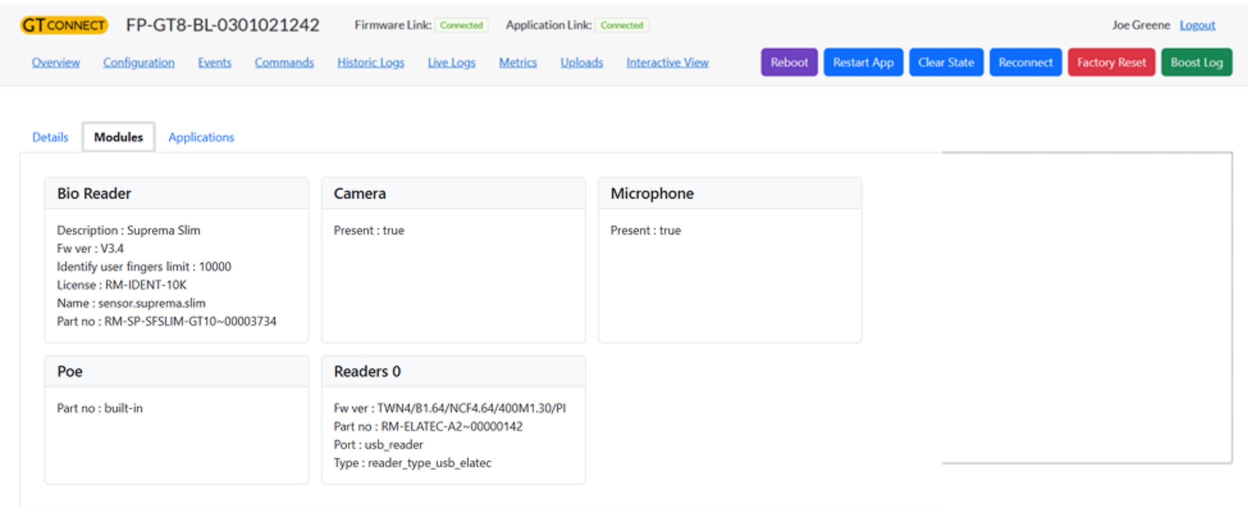
Firmware

The following information is displayed about the device's firmware:

- **Version Name**. The version number of the firmware.
- **Version Code**. The firmware's version identification number.

Modules tab

The **Modules** tab displays details about the modules installed on the device, such as biometrics.



Readers 0

The following information is displayed about the device's Reader:

- **Type**. The type of reader installed in the device.
- **Port**. This is the internal connection used for Reader0.
- **Fw ver**. The Forwarder version number, if available.
- **Part no**. The Reader's identification number.

Readers 1

The following information is displayed about the device's Reader:

- **Port**. This is the internal connection used for Reader1.
- **Fw ver**. The Forwarder version number, if available.
- **Type**. The type of reader installed in the device.
- **Part no**. The Reader's identification number.

Poe

The Power over Ethernet is either built in or an external Module which is installed.

- **Part no**. If the Module is not built in, the PoE part number is displayed.

Camera

This displays whether a camera has been installed on the device.

- **Present**. If **true** is displayed it denotes that a camera has been detected on the device.

Microphone

This displays whether a microphone has been installed on the device.

- **Present**. If **true** is displayed it denotes that a microphone has been detected on the device.

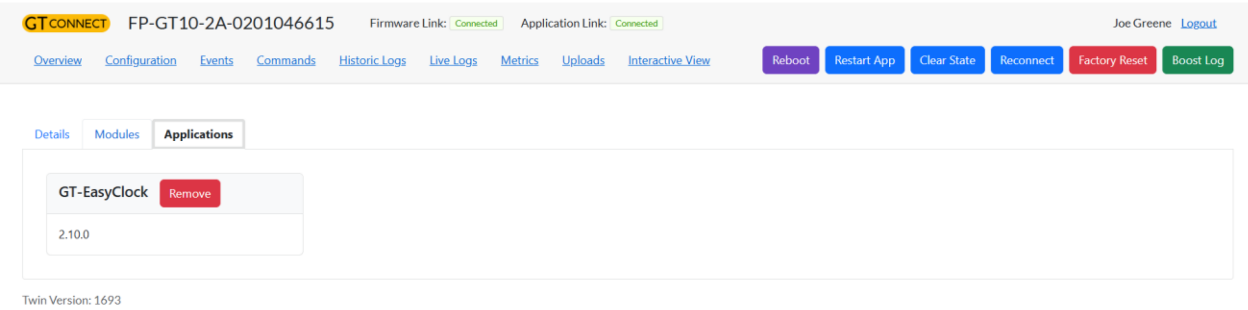
Io Modules 0

This displays details about the number of internal and external Modules.

- **Num external readers**. The number of external readers.
- **Num inputs**. The number of inputs.
- **Num outputs**. The number of outputs
- **Part no**. The part number of the Reader.

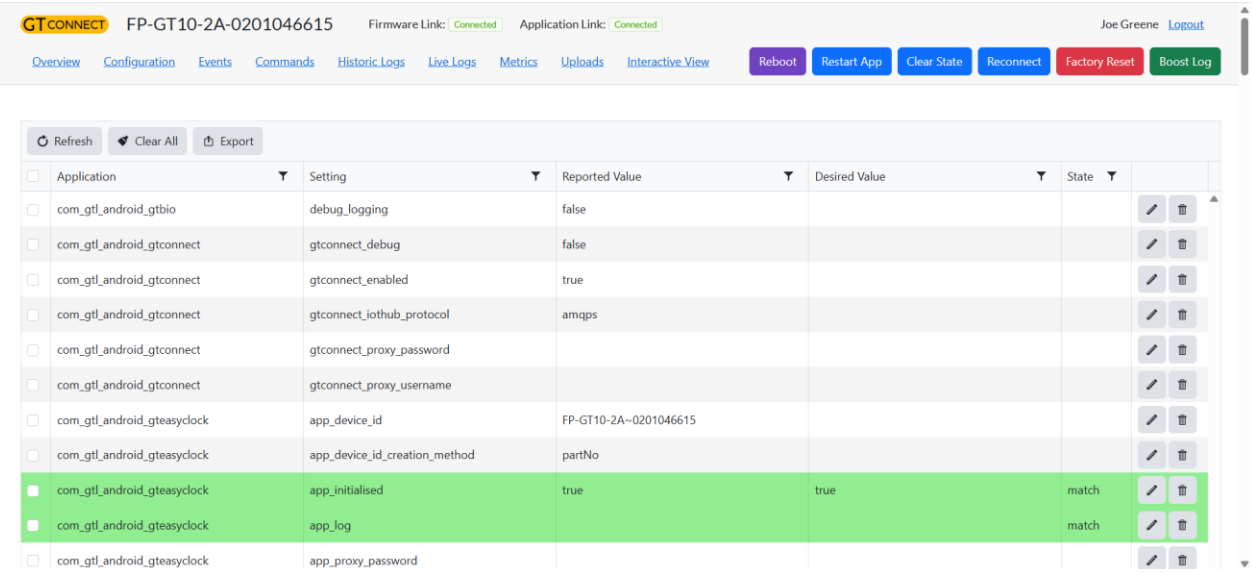
Applications Tab

The **Applications** tab displays the software running on the device.



Configuration Menu

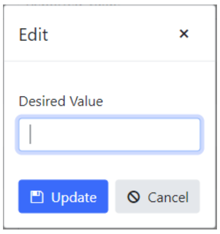
The **Configuration** menu displays all the Configurations on the selected device. To display the **Configuration** page, from the **Device Summary** page, click **Diagnostics**. Click the **Configuration** menu.



To ensure the page view displays the latest information for the device, click **Refresh**. The columns can then be filtered, as required.

At the top of the page, the device name is displayed and the device's status: for example, Connected

Modifying a Configuration value

1. To modify a specific Configuration value, in the relevant row, click **Edit**.
2. 

3. In the **Desired Value** box, enter the required modification. When a value is entered it makes a modification for the selected property that will be actioned on a device. This allows you to make quick modifications to a device: however, these properties are typically set using Configuration via GTConnect device Config.
4. Click **Update** to make the modification or click **Cancel** to abandon the modification.

When the associated row turns green and the state is set to “match”, that means the clock is reporting the same value back

Clearing a Configuration

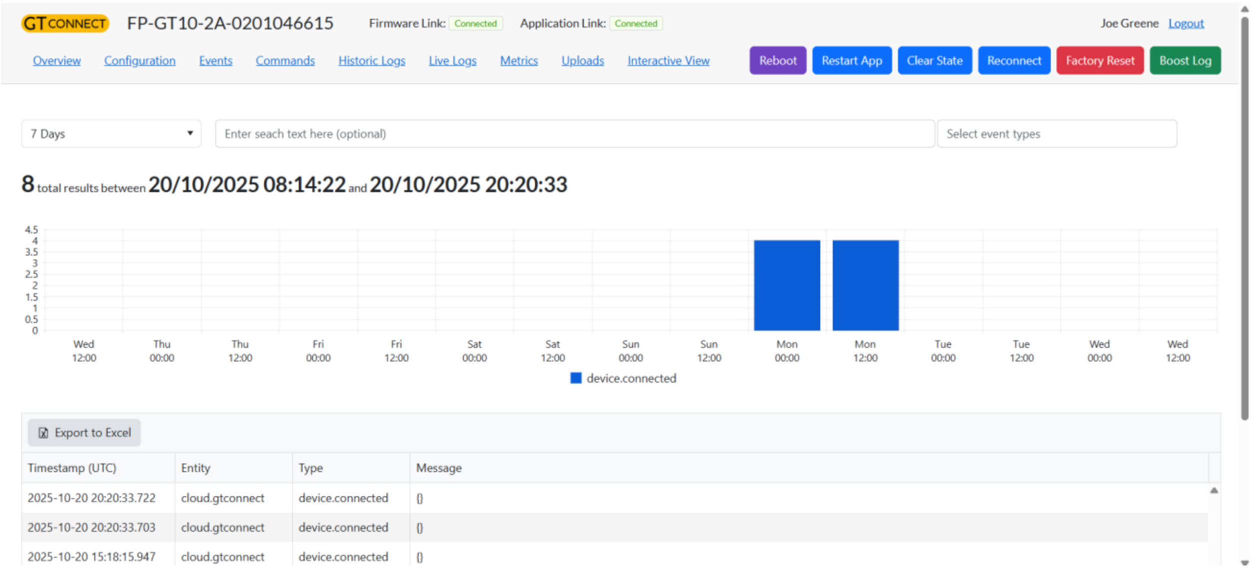
1. From the Device Summary page, click Diagnostics. Click the Configuration menu.
2. To delete a specific Configuration, in the relevant row, click **Delete**. The Configuration is then automatically cleared. (**Note:** This does not delete the actual setting, but just clears the desired value)

Clearing all Configurations

1. To clear *all* the configurations from the device, do the following: From the **Device Summary** page, click **Diagnostics**. Click the **Configuration** menu
2. To delete all the Configurations, click **Clear All**. All the Configurations are then automatically and permanently cleared. (**Note:** This does not delete the actual settings, but just clears the desired value)

Events Menu

The **Events** page displays the activity which has occurred on the device along with an activity log, which can be exported to an Excel spreadsheet. To display the **Events** page, from the **Device Summary** page, click **Diagnostics**. Click the **Events** menu.



The graph displays the date and time range as well as duration on which the Events occurred.

To locate a specific Event in the **Select event types** box, enter the name of the Event and press ENTER. The graph then automatically updates to reflect the Event filter.

The date range on which you view Events can be modified. Use the list box to select the required range, which spans from 30 Days to 1 Hour. When a value other than the default 7 Days is selected, the graph automatically populates to reflect the selection.

Exporting Events

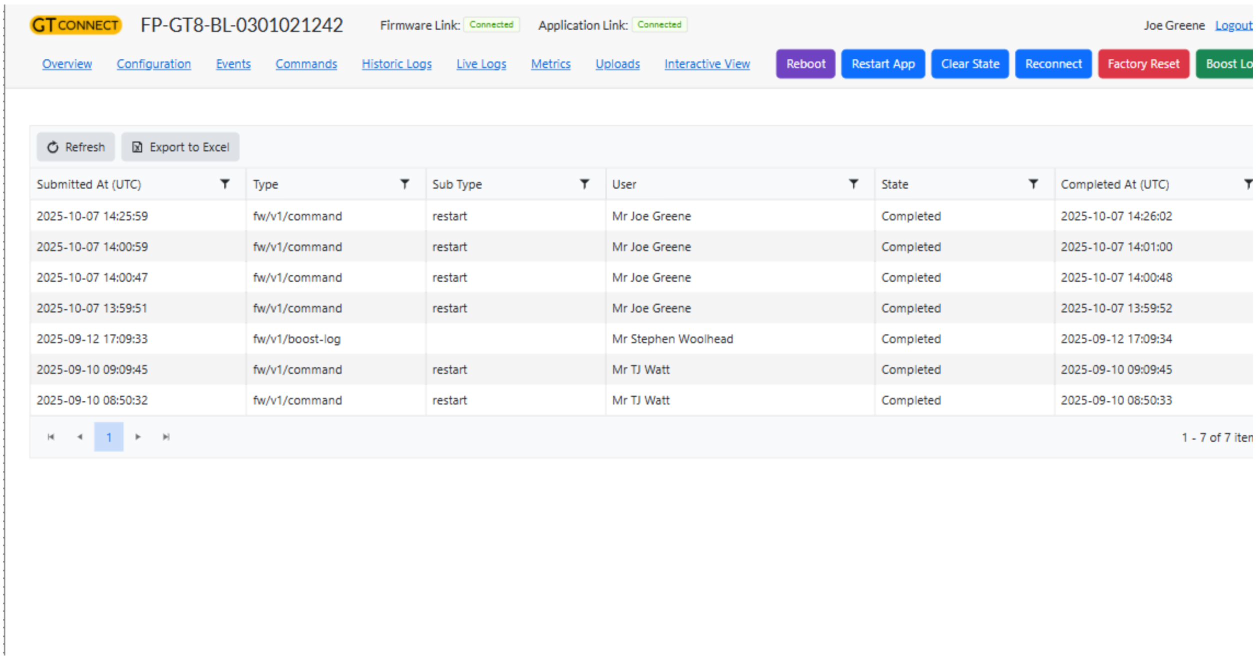
1. From the **Device Summary** page, click **Diagnostics**. Click the **Events** menu.
2. You can filter which Events are displayed using the **Events** box and/or by duration.

Note: when you have active filters set, they are applied/used in the export file.

3. Under the graph, click **Export to Excel**, to export the filtered event list.
4. The data is then exported to .xlsx and downloaded to your device.
5. The spreadsheet can then be renamed and saved to a location of your choice.

Commands Menu

The Commands tab shows you a list of commands that have been sent to the device through GTConnect.



Submitted At (UTC)	Type	Sub Type	User	State	Completed At (UTC)
2025-10-07 14:25:59	fw/v1/command	restart	Mr Joe Greene	Completed	2025-10-07 14:26:02
2025-10-07 14:00:59	fw/v1/command	restart	Mr Joe Greene	Completed	2025-10-07 14:01:00
2025-10-07 14:00:47	fw/v1/command	restart	Mr Joe Greene	Completed	2025-10-07 14:00:48
2025-10-07 13:59:51	fw/v1/command	restart	Mr Joe Greene	Completed	2025-10-07 13:59:52
2025-09-12 17:09:33	fw/v1/boost-log		Mr Stephen Woolhead	Completed	2025-09-12 17:09:34
2025-09-10 09:09:45	fw/v1/command	restart	Mr TJ Watt	Completed	2025-09-10 09:09:45
2025-09-10 08:50:32	fw/v1/command	restart	Mr TJ Watt	Completed	2025-09-10 08:50:33

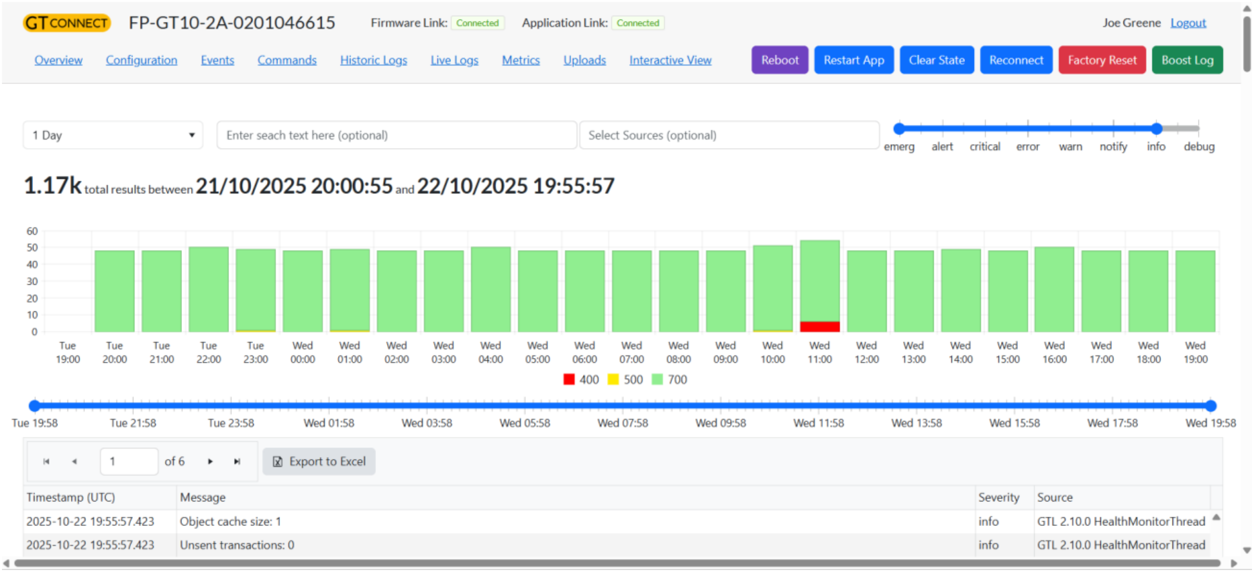
Exporting Commands

To export commands you can do as such:

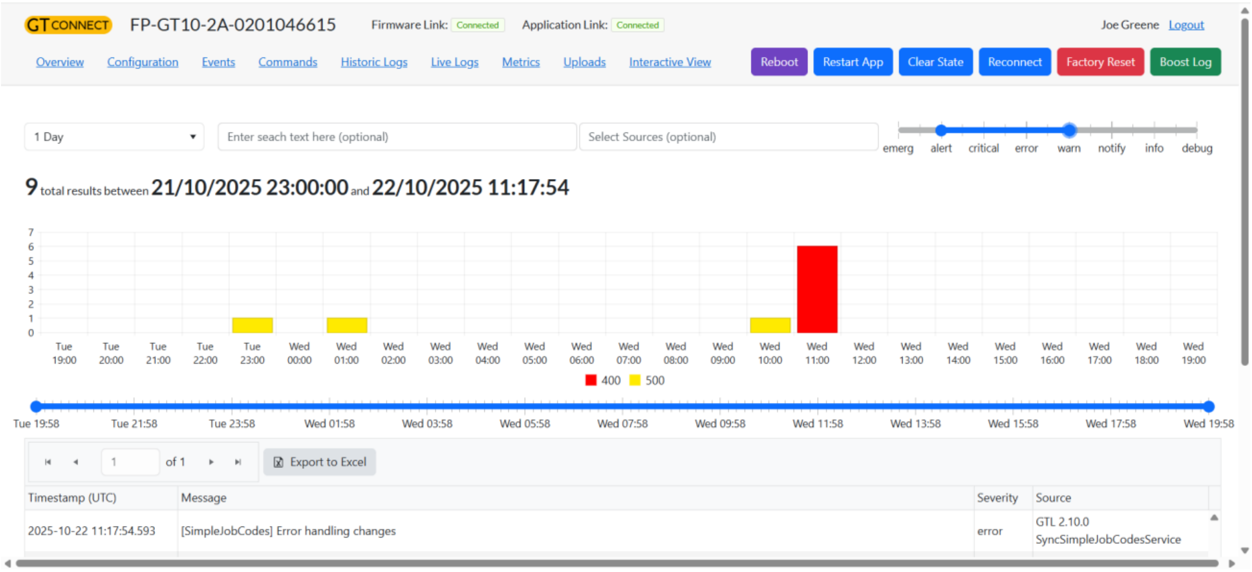
6. From the **Device Summary** page, click **Diagnostics**. Click the Commands menu.
7. You can filter which historic items are displayed using the **Sources** box and/or by duration and areas of concern: for example, **alert**, **critical**, **error** and so on.
8. Under the graph, click **Export to Excel**, to export the current selection to an Excel document.

Historic Logs Menu

The **Historic Logs** page displays the device activity. To reduce the number of items displayed, use the search and **Select Sources** list boxes. To display the **Historic Logs** page, from the **Device Summary** page, click **Diagnostics**. Click the **Historic Logs** menu.



Use the slider, at either or both ends, to further reduce the data displayed on the graph. As the selection is modified, the graph updates. Under the graph, you can use the date slider to scale up/ down the required date range.



Exporting Historic Logs

To export historic logs you can do as such

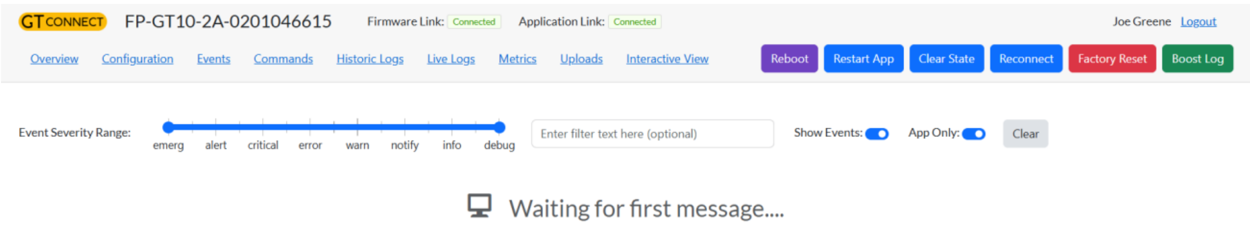
9. From the **Device Summary** page, click **Diagnostics**. Click the **Events** menu.
10. You can filter which historic items are displayed using the **Sources** box and/or by duration and areas of concern: for example, **alert**, **critical**, **error** and so on.
11. Under the graph, click **Export to Excel**, to export the current selection to an Excel document.

Live Logs Menu

The **Live Logs** page displays live information for the selected device. Items displayed on the page can either be any issues which are detected, as they occur, or for a specified severity range: for example, **critical**, **error** and **warn**.

To display the **Live Logs** page, from the **Device Summary** page, click **Diagnostics**. Click the

Live Logs menu.



Use the slider to determine which severity statuses are included. Additional filter text can be entered in the box.

As filters are applied, as long as the device has the status of **Connected**, any message which correspond to the filter selection(s) are displayed.

Menu

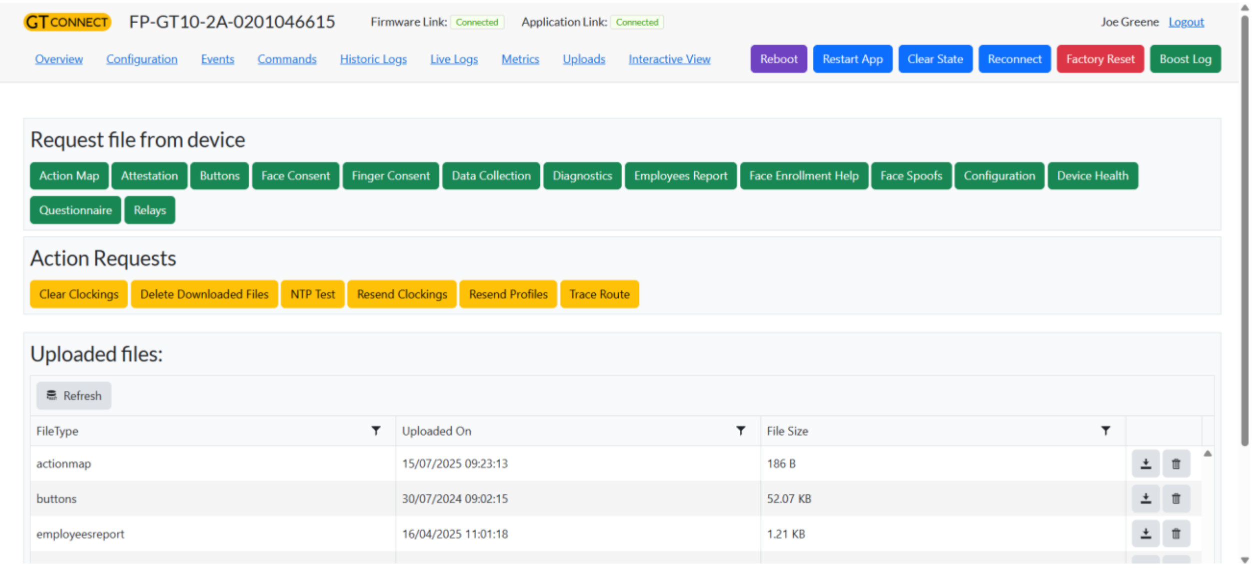
The **Metrics** page displays the selected device's face recognition quality and an unsent transaction count.

To display the **Metrics** page, from the **Device Summary** page, click **Diagnostics**. Click the **Metrics** menu.

Uploads Menu

The **Uploads** page shows a list of commands and file types available for upload from the applications manifest. Clicking on one of the file types will make the device upload its current version of the file to GTConnect, after some time for this upload to complete, you will be able to download the file.

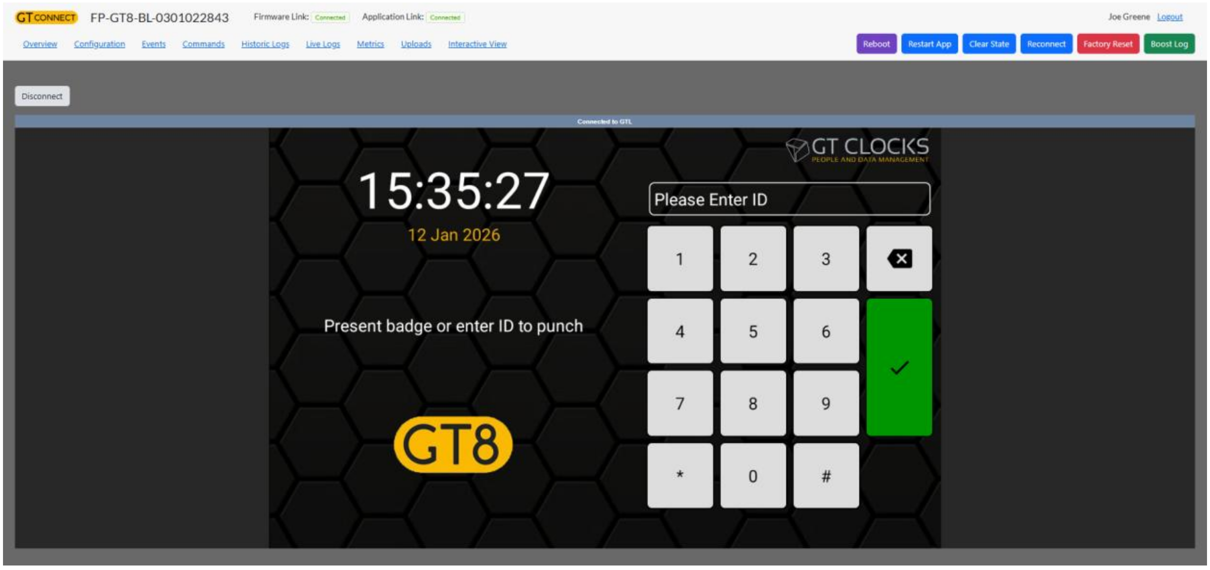
Click **Refresh** to ensure the latest uploads are displayed for the selected device.



Interactive View Menu

The **Interactive View** page allows you to start a remote session to the target device. This allows you to see the User Interface on the device and interact with it by clicking to imitate touches on a touchscreen device, or interact with a visual representation of the device's buttons.

To display the Interactive View page, from the Device Summary page, click Diagnostics. Click the Interactive View menu & then click 'Connect'



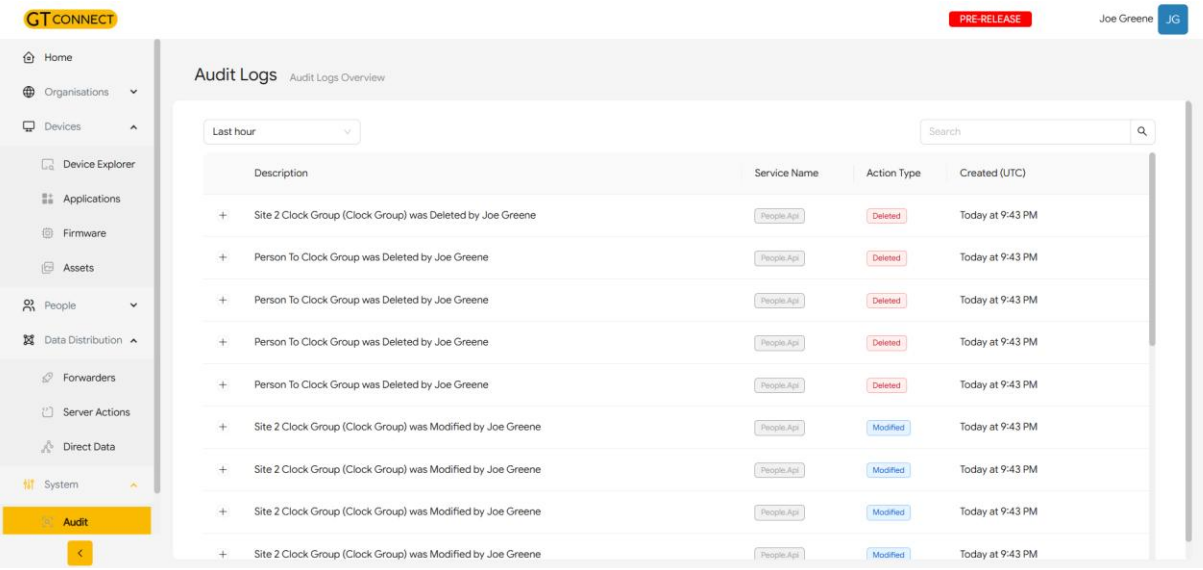
Chapter 9: System Audit

System Audit

This Chapter describes how to use the Audit pages on GTConnect.

Auditing GTConnect

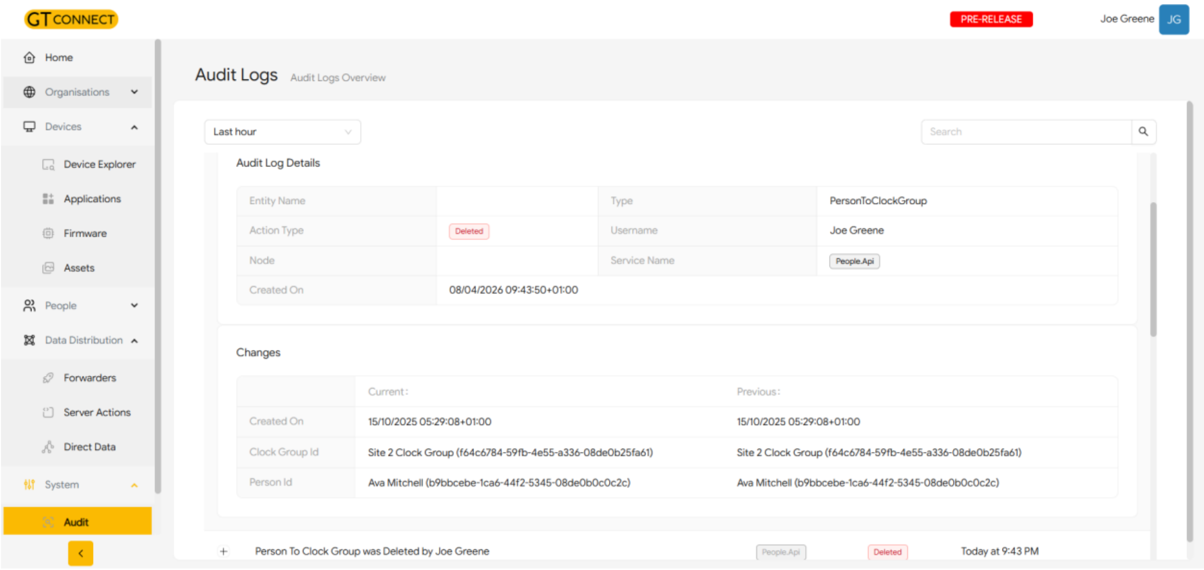
The Audit service continuously runs in the background and tracks modifications to all data and actions performed. To display the Audit log, select the **System** menu and click **Audit**.



Use the column headings to sort the entries into ascending or descending order. Alternatively, to locate a specific item, in the **Search** box, enter a key term to filter the log entries and press ENTER. The following columns are available:

- **Description**. Information on the modification which occurred and the name of the User who performed the modification. Modifications include creating and modifying objects such as devices, people, and so on.
- **Service Name**. Identifies where in the system the modification occurred: for example, whether it was a modification to a Device or People.
- **Action Type**. Displays whether data was either **Added**, **Modified** or **Deleted**.
- **Created**. Displays the date and time the modification was made.

To view details for a log entry, click + expand.


GT CONNECT
PRE-RELEASE
Joe Greene
JG
Home
Organisations
Devices
Device Explorer
Applications
Firmware
Assets
People
Data Distribution
Forwarders
Server Actions
Direct Data
System
Audit
Audit Logs
Audit Logs Overview
Last hour
Search
Audit Log Details
Entity Name
Type
PersonToClockGroup
Action Type
Deleted
Username
Joe Greene
Node
Service Name
People.Api
Created On
08/04/2026 09:43:50+01:00
Changes
Current :
Previous :
Created On
15/10/2025 05:29:08+01:00
15/10/2025 05:29:08+01:00
Clock Group Id
Site 2 Clock Group (f64c6784-59fb-4e55-a336-08de0b25fa61)
Site 2 Clock Group (f64c6784-59fb-4e55-a336-08de0b25fa61)
Person Id
Ava Mitchell (b9bbcebe-1ca6-44f2-5345-08de0b0c0c2c)
Ava Mitchell (b9bbcebe-1ca6-44f2-5345-08de0b0c0c2c)
Person To Clock Group was Deleted by Joe Greene
People.Api
Deleted
Today at 9:43 PM