



Access Control Planning Worksheet

A practical planning workbook for commercial facilities, schools, municipalities, manufacturing sites, houses of worship, healthcare environments, property managers, and multi-site organizations.

Before choosing readers, locks, credentials, or software, organize the decisions that shape a successful project.

- Project goals and stakeholders
- Doors, openings, credentials, and access groups
- IT requirements, integrations, and life-safety considerations
- Proposal readiness, testing, and long-term administration



Prepared by Umbrella Security Systems

Commercial security planning, installation, integration, and long-term support across Chicago and Northern Illinois.

How to Use This Worksheet

Access control planning is not just a hardware decision. A successful system should be designed around your facility, users, operating schedule, IT requirements, door conditions, and the people who will manage the system after installation.

Use this worksheet before:

- ☐ Requesting an access control proposal
- ☐ Comparing proposals from different providers
- ☐ Adding controlled doors
- ☐ Replacing keys
- ☐ Upgrading an outdated access control platform
- ☐ Planning a school, municipal, manufacturing, healthcare, worship, nonprofit, or commercial facility project
- ☐ Meeting with Umbrella Security for a planning consultation or walkthrough

Recommended team input

- | | |
|---|---|
| ☐ Facility or maintenance leadership | ☐ Security leadership |
| ☐ IT | ☐ HR or administration |
| ☐ Operations | ☐ Finance or procurement |
| ☐ Executive sponsor | |

What to bring to a planning meeting

- | | |
|---|--|
| ☐ Floor plans | ☐ Door list |
| ☐ Existing key schedule | ☐ Current security concerns |
| ☐ Known problem doors | ☐ Vendor or visitor access requirements |
| ☐ IT/network requirements | ☐ Photos of doors being considered |
| ☐ Any proposal you are reviewing | |

UMBRELLA FIELD NOTE

A door list is not the same thing as a door survey. A door list tells us what you want controlled. A door survey helps determine what it will actually take to control those openings safely, cleanly, and reliably.

Project Goals and Risk Priorities

Before selecting a platform or hardware, define what the access control system needs to accomplish.

Project type

- ☐ New access control system
- ☐ Replace mechanical keys
- ☐ Replace outdated hardware
- ☐ Improve visitor or vendor access
- ☐ Integrate with video surveillance
- ☐ Integrate with intrusion alarms
- ☐ Support multiple buildings or sites
- ☐ Upgrade existing system
- ☐ Add controlled doors
- ☐ Improve employee access management
- ☐ Improve emergency workflows
- ☐ Integrate with intercoms
- ☐ Improve audit trails or reporting
- ☐ Other

Primary goals

Security concerns

- ☐ Lost or copied keys
- ☐ Too many people with unrestricted access
- ☐ After-hours access concerns
- ☐ Sensitive area protection
- ☐ School or employee safety
- ☐ Emergency lockdown / unlock
- ☐ No easy way to connect access events with video
- ☐ Former employees with access
- ☐ Unclear vendor or contractor access
- ☐ Public entrance control
- ☐ Inventory protection
- ☐ Visitor management
- ☐ Poor audit trail
- ☐ Existing system is hard to manage or unreliable

Priority areas

Area	Why it matters	Current concern

Stakeholder Planning Map

Access control affects more than the person who manages the doors. Identify who should provide input, approve decisions, and manage the system after installation.

Role	Input needed	Approval?
Facility / Maintenance	Door conditions, hardware, power, cabling, known issues	[]
Security	Risks, incidents, restricted areas, emergency workflows	[]
IT	Network, cloud, authentication, cybersecurity, integrations	[]
HR / Administration	Onboarding, offboarding, access approvals, records	[]
Operations	Schedules, vendors, deliveries, workflow exceptions	[]
Finance / Procurement	Budget, subscriptions, warranty, service agreements	[]
Executive Sponsor	Risk tolerance, policy, budget authority, final decisions	[]

System ownership

Primary administrator: _____

Facility contact: _____

Backup administrator: _____

Security contact: _____

IT contact: _____

HR/admin contact: _____

Access change approval

Who approves new access or access changes? _____

Who removes access when someone leaves? _____

How quickly should access be removed after termination or role change?

☐ Immediately ☐ Same day ☐ Within 24 hours ☐ Within 48 hours ☐ Other

UMBRELLA FIELD NOTE

The missed stakeholder usually shows up later as friction. IT may reject a platform. HR may not have an offboarding process. Operations may need after-hours exceptions. Facilities may know a door cannot be wired the way the proposal assumes.

Facility and Door Scope Overview

Define the overall project scope before completing the detailed door inventory.

Facility information

Organization: _____

Facility name: _____

Address / city: _____

Facility type:

- | | |
|--|---|
| ☐ Commercial office | ☐ School / education |
| ☐ Municipal / government | ☐ Manufacturing / warehouse |
| ☐ Food manufacturing / processing | ☐ Healthcare / senior living |
| ☐ Multifamily / mixed-use | ☐ Worship / nonprofit |
| ☐ Hospitality / entertainment | ☐ Public safety / judicial |
| ☐ Other | |

Project scope

Estimated number of controlled doors: _____

Number of buildings involved: _____

Number of sites involved: _____

Is this a phased project?

- ☐ Yes
- ☐ No
- ☐ Not sure

Current access method

- | | | |
|---|---|---|
| ☐ Mechanical keys | ☐ Existing card/fob system | ☐ Mobile credentials |
| ☐ PIN/keypad | ☐ Biometric readers | ☐ Receptionist/front desk only |
| ☐ Uncontrolled doors | ☐ Mixed system | ☐ Other |

UMBRELLA REVIEW POINT

A project can look like a three-door job at first, but the real scope may include door hardware, power, cable paths, IT approval, fire alarm coordination, credentials, user groups, training, and support.

Facility Scope - Problem Doors

Use this page to identify doors that already cause operational, maintenance, security, or access problems.

Known problem doors

Door / Location	Problem	Urgency
		☐ Low ☐ Medium ☐ High
		☐ Low ☐ Medium ☐ High
		☐ Low ☐ Medium ☐ High
		☐ Low ☐ Medium ☐ High
		☐ Low ☐ Medium ☐ High
		☐ Low ☐ Medium ☐ High

Existing systems

- | | |
|--|--|
| ☐ Video surveillance | ☐ Intrusion alarm |
| ☐ Fire alarm | ☐ Intercom |
| ☐ Visitor management | ☐ Elevator control |
| ☐ Emergency notification / mass notification | ☐ HR / identity management system |
| ☐ Network closet / server room access control | ☐ None / not sure |

Phase notes or existing system concerns

Door Inventory Worksheet - Quick View

Create a quick list of doors being considered for access control. A detailed version is on the next page.

#	Door / opening location	Interior or exterior?	Why control this door?	Priority
1		☐ Interior ☐ Exterior		☐ Low ☐ Med ☐ High
2		☐ Interior ☐ Exterior		☐ Low ☐ Med ☐ High
3		☐ Interior ☐ Exterior		☐ Low ☐ Med ☐ High
4		☐ Interior ☐ Exterior		☐ Low ☐ Med ☐ High
5		☐ Interior ☐ Exterior		☐ Low ☐ Med ☐ High
6		☐ Interior ☐ Exterior		☐ Low ☐ Med ☐ High
7		☐ Interior ☐ Exterior		☐ Low ☐ Med ☐ High
8		☐ Interior ☐ Exterior		☐ Low ☐ Med ☐ High

Common door purposes

- ☐ Main entrance
 ☐ Employee entrance
 ☐ Public entrance
 ☐ Back door
- ☐ Delivery door
 ☐ Loading dock
 ☐ Office area
 ☐ IT / server room
- ☐ Mechanical room
 ☐ Storage area
 ☐ Inventory area
 ☐ Classroom / school area
- ☐ Medication / records area
 ☐ Elevator / stairwell
 ☐ Gate
 ☐ Other

Unknowns to verify

UMBRELLA FIELD NOTE

Exterior doors usually need extra attention. Weather, freezing conditions, door condition, power, cable path, vandalism risk, and daily usage can all affect the access control design.

Detailed Door Review

Use one row per door or make copies of this page for larger projects.

Door location	Existing hardware	Reader?	Door contact?	REX?	Fire alarm?	Notes
		☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No ☐ Not sure	
		☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No ☐ Not sure	
		☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No ☐ Not sure	
		☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No ☐ Not sure	

Door conditions to review

- ☐ Aluminum storefront door
☐ Wood door
☐ Door with panic hardware
☐ Fire-rated door
☐ Door frequently propped open
☐ Existing maglock
☐ Weather exposure
☐ May need ADA/accessibility review
☐ Door condition unknown
- ☐ Hollow metal door
☐ Glass door
☐ Exterior door
☐ Door does not close reliably
☐ Existing electric strike
☐ Existing crash bar
☐ High traffic
☐ May need fire alarm coordination

Questions for site walkthrough

UMBRELLA REVIEW POINT

If a proposal simply says reader and lock without clarifying lock hardware, request-to-exit, door position monitoring, power, fire alarm interface, or egress approach, the scope is not clear enough.

Access Groups and User Permissions

Build access around roles, departments, schedules, locations, and risk. The goal is the right people, the right access, at the right time - and no more than they need.

Common access groups

- | | | |
|---|--|---|
| ☐ All employees | ☐ Managers | ☐ Executive leadership |
| ☐ Facility / maintenance | ☐ IT | ☐ Security |
| ☐ HR / administration | ☐ Teachers / school staff | ☐ Municipal staff |
| ☐ Public works | ☐ Shipping and receiving | ☐ Warehouse team |
| ☐ Production team | ☐ Healthcare staff | ☐ Cleaning crew |
| ☐ Vendors | ☐ Contractors | ☐ Visitors |
| ☐ Volunteers | ☐ Temporary employees | ☐ Other |

Access group planning table

Access group	Doors / areas needed	Days / hours	Restricted areas	Approval owner

UMBRELLA FIELD NOTE

Access control fails when permissions drift. That drift usually starts with exceptions: one person gets access to everything because it was faster, a vendor credential never expires, or a terminated employee is removed from payroll but not from access control.

Temporary and Administrative Access

Define who receives temporary access, how it expires, and who should have administrator privileges.

Temporary access

- | | | |
|--|---|---|
| ☐ Contractors | ☐ Vendors | ☐ Cleaning crew |
| ☐ Event staff | ☐ Substitute staff | ☐ Volunteers |
| ☐ Temporary employees | ☐ Visitors | ☐ Delivery personnel |
| ☐ Other | | |

How should temporary access expire?

- | | | |
|--|---|---|
| ☐ Same day | ☐ End of week | ☐ End of project |
| ☐ Specific date | ☐ Manual removal | ☐ Not sure |

Administrative access

Full admin 1: _____

Full admin 2: _____

Limited admin 1: _____

Limited admin 2: _____

Admin notes

UMBRELLA REVIEW POINT

Not every user needs full administrator rights. Administrator access should be limited to the people responsible for system changes, access approval, reporting, and support coordination.

Credential Strategy

Credentials are how users prove they are allowed to enter. The right strategy depends on risk, budget, user behavior, administrative capacity, technology preferences, and support expectations.

Credential types to consider

- ☐ Cards
- ☐ Mobile credentials
- ☐ Biometrics
- ☐ Mobile + PIN
- ☐ Contractor credentials
- ☐ Fobs
- ☐ PINs / keypads
- ☐ Card + PIN
- ☐ Temporary visitor credentials
- ☐ Not sure

Credential planning table

Credential type	Who would use it?	Strengths	Concerns / watch-outs
Cards / fobs			
Mobile credentials			
PINs / keypads			
Biometrics			
Temporary credentials			

Credential lifecycle

Who issues credentials? _____

Who approves credential assignment? _____

Who disables lost credentials? _____

How quickly should lost credentials be disabled?

- ☐ Immediately
- ☐ Same day
- ☐ Within 24 hours
- ☐ Other

Estimated users needing credentials: _____

Estimated spare / temporary credentials: _____

IT and Cybersecurity Readiness

Modern access control is physical security and network-connected technology. IT should be involved before a platform is selected, not after installation begins.

IT contact

Primary IT contact: _____

Email / phone: _____

Internal IT or outside provider?

☐ Internal IT

☐ Outside provider

☐ Both

☐ Not sure

Architecture preference

☐ Cloud-managed

☐ On-premise

☐ Hybrid

☐ Not sure

IT readiness checklist

Requirement	Status	Notes
Network requirements reviewed	☐ Yes ☐ No ☐ Not sure	
Cloud platform approval needed	☐ Yes ☐ No ☐ Not sure	
Firewall rules reviewed	☐ Yes ☐ No ☐ Not sure	
VLAN / network segmentation needed	☐ Yes ☐ No ☐ Not sure	
Admin MFA reviewed	☐ Yes ☐ No ☐ Not sure	
SSO needed	☐ Yes ☐ No ☐ Not sure	
Remote access policy reviewed	☐ Yes ☐ No ☐ Not sure	
Vendor remote access allowed	☐ Yes ☐ No ☐ Not sure	
Backup / recovery plan needed	☐ Yes ☐ No ☐ Not sure	
Software update responsibility assigned	☐ Yes ☐ No ☐ Not sure	
Logs / reports reviewed	☐ Yes ☐ No ☐ Not sure	
Internet outage behavior understood	☐ Yes ☐ No ☐ Not sure	

IT Questions to Resolve

Use this page to capture IT requirements, open questions, and platform concerns before equipment is selected.

IT questions to resolve

UMBRELLA FIELD NOTE

IT surprises are expensive late in the project. If a platform cannot meet cloud approval, network segmentation, remote access, authentication, or update requirements, the issue should be discovered before purchase - not after equipment is ordered.

Integrations and Emergency Workflows

Access control becomes more useful when it supports real workflows. The question is whether the integration improves security, operations, response, or administration.

Integration needs

- ☐ Video surveillance
 ☐ Intrusion alarms
 ☐ Elevator control
 ☐ Emergency notification
 ☐ Emergency unlock workflow
 ☐ Mobile alerts
 ☐ Other
- ☐ Intercoms
 ☐ Visitor management
 ☐ HR / identity system
 ☐ Lockdown workflow
 ☐ Fire alarm interface
 ☐ Reporting / audit exports

Integration planning table

Integration	Desired workflow	Priority	Notes
Video surveillance		[] Low [] Med [] High	
Intercom		[] Low [] Med [] High	
Intrusion alarm		[] Low [] Med [] High	
Visitor management		[] Low [] Med [] High	
Emergency workflow		[] Low [] Med [] High	
Other		[] Low [] Med [] High	

Emergency planning

- ☐ Lockdown
 ☐ First responder access
 ☐ Emergency notification
 ☐ After-hours incident review
- ☐ Emergency unlock
 ☐ Fire alarm coordination
 ☐ Muster / occupant awareness
 ☐ Not sure

Emergency Workflow Notes

Capture ownership, training, and open questions for emergency access workflows.

Responsible for emergency security decisions: _____

Who should be trained on emergency workflows? _____

Emergency workflow notes

UMBRELLA REVIEW POINT

Integrations should not be added because they sound impressive in a demo. They should solve a real workflow: verifying an access event, managing visitors, reducing false alarms, supporting lockdown, simplifying offboarding, or helping administrators respond faster.

Proposal Readiness Checklist

Use this page before approving an access control proposal. A good proposal should make the scope visible.

Proposal review

Provider: _____

Proposal date: _____

Proposal amount: _____

Controlled doors included: _____

Scope clarity checklist - project scope

Proposal item	Clear?	Notes
Included doors	☐ Yes ☐ No ☐ Not sure	
Excluded doors	☐ Yes ☐ No ☐ Not sure	
Hardware assumptions	☐ Yes ☐ No ☐ Not sure	
Reader types	☐ Yes ☐ No ☐ Not sure	
Credential quantities	☐ Yes ☐ No ☐ Not sure	
Software subscriptions	☐ Yes ☐ No ☐ Not sure	
Licensing terms	☐ Yes ☐ No ☐ Not sure	
Cloud or server requirements	☐ Yes ☐ No ☐ Not sure	
Controller locations	☐ Yes ☐ No ☐ Not sure	
Power requirements	☐ Yes ☐ No ☐ Not sure	

Proposal Scope Details

Continue reviewing whether the proposal explains the field, life-safety, training, warranty, and customer-responsibility details clearly.

Scope clarity checklist - implementation details

Proposal item	Clear?	Notes
Fire alarm interface	☐ Yes ☐ No ☐ Not sure	
Request-to-exit requirements	☐ Yes ☐ No ☐ Not sure	
Door position monitoring	☐ Yes ☐ No ☐ Not sure	
Warranty coverage	☐ Yes ☐ No ☐ Not sure	
Service agreement options	☐ Yes ☐ No ☐ Not sure	
Training scope	☐ Yes ☐ No ☐ Not sure	
Documentation scope	☐ Yes ☐ No ☐ Not sure	
Customer responsibilities	☐ Yes ☐ No ☐ Not sure	
Future expansion considerations	☐ Yes ☐ No ☐ Not sure	

WATCH-OUT BEFORE YOU APPROVE

Be cautious with proposals that only list equipment and labor without explaining how the design supports your doors, access groups, schedules, IT requirements, egress needs, integrations, testing, and long-term ownership.

Questions for proposal review

Commissioning - Door and Credential Testing

A system should not be considered complete simply because the hardware is installed. Before final acceptance, test the system in the ways it will actually be used.

Door operation testing

Test	Complete?	Notes
Door locks properly	☐ Yes ☐ No	
Door unlocks properly	☐ Yes ☐ No	
Door closes and latches	☐ Yes ☐ No	
Reader responds correctly	☐ Yes ☐ No	
Door position status works	☐ Yes ☐ No	
Request-to-exit works	☐ Yes ☐ No	
Forced-door event works	☐ Yes ☐ No	
Held-open event works	☐ Yes ☐ No	
Scheduled lock/unlock works	☐ Yes ☐ No	
Manual command works	☐ Yes ☐ No	

Credential testing

Test	Complete?	Notes
Valid credential granted access	☐ Yes ☐ No	
Invalid credential denied	☐ Yes ☐ No	
Disabled credential denied	☐ Yes ☐ No	
Temporary credential expires	☐ Yes ☐ No	
Correct access group permissions	☐ Yes ☐ No	
Schedule restrictions work	☐ Yes ☐ No	

Commissioning - Integration Testing

Use this page to confirm integrated workflows and document issues before accepting the project.

Integration testing

Test	Complete?	Notes
Access event links to video	☐ Yes ☐ No ☐ N/A	
Intercom unlock works	☐ Yes ☐ No ☐ N/A	
Alarm interaction works	☐ Yes ☐ No ☐ N/A	
Emergency workflow tested	☐ Yes ☐ No ☐ N/A	
Reports/export tested	☐ Yes ☐ No ☐ N/A	

Open issues before acceptance

UMBRELLA FIELD NOTE

Commissioning protects the customer from discovering critical problems after the installer leaves. It is easier to fix a schedule, credential issue, alert, integration setting, or door behavior during acceptance than after the system becomes part of daily operations.

Long-Term Administration Plan

Access control is not a set-it-and-forget-it system. Plan ownership before the system goes live.

Administrator roles

Role	Name	Responsibilities
Primary administrator		
Backup administrator		
IT contact		
Facility contact		
HR/admin contact		
Security contact		

Training checklist

- | | |
|---|---|
| ☐ Add users | ☐ Remove users |
| ☐ Assign access groups | ☐ Change schedules |
| ☐ Replace lost credentials | ☐ Disable credentials |
| ☐ Review events | ☐ Run reports |
| ☐ Respond to alerts | ☐ Manage mobile credentials |
| ☐ Review video-linked events | ☐ Remote lock/unlock where allowed |
| ☐ Update visitor/vendor access | ☐ Escalate service issues |

UMBRELLA FIELD NOTE

The system should work for the person managing it on a busy Tuesday, not just during the sales demo. If adding users, removing access, reviewing events, and changing schedules are confusing, the system will create workarounds.

Offboarding and Access Review

Long-term administration depends on clean offboarding, regular access review, and clear ownership after installation.

Offboarding procedure

Who notifies the access control administrator when someone leaves? _____

How quickly should access be removed?

☐ Immediately ☐ Same day ☐ Within 24 hours ☐ Other

How are physical credentials recovered? _____

How are mobile credentials revoked? _____

How are vendor or temporary credentials reviewed? _____

Periodic access review

- | | |
|---|---|
| ☐ Monthly | ☐ Quarterly |
| ☐ Semiannually | ☐ Annually |
| ☐ Former employees | ☐ Vendors |
| ☐ Temporary users | ☐ Duplicate users |
| ☐ Old credentials | ☐ Users with too much access |
| ☐ Administrator rights | ☐ Access groups |
| ☐ Schedules | ☐ Reports / audit logs |

Review notes

UMBRELLA REVIEW POINT

Periodic reviews help catch former employees, old vendor access, duplicate users, outdated credentials, excessive permissions, and administrator rights that no longer make sense.

Ready for an Access Control Planning Review?

If you are planning a new system, upgrading an outdated platform, replacing keys, adding controlled doors, or comparing proposals, Umbrella Security can help you think through the project before installation begins.

Umbrella can help evaluate:

- ☐ Which doors should be controlled
- ☐ Which access groups make sense
- ☐ Which credential strategy fits your users
- ☐ Whether cloud, on-premise, or hybrid architecture is appropriate
- ☐ What IT needs to review
- ☐ What door hardware and egress issues need attention
- ☐ Whether access events should connect with video, intercoms, alarms, or emergency workflows
- ☐ What should be tested before final acceptance
- ☐ How your team will manage the system after installation

Before your review, gather what you can

- | | |
|---|--|
| ☐ Completed worksheet | ☐ Door list |
| ☐ Floor plan | ☐ Existing proposal, if any |
| ☐ Photos of doors being considered | ☐ Existing access control information |
| ☐ Known problem doors | ☐ IT/network requirements |
| ☐ Timeline | ☐ Budget range, if known |
| ☐ Key stakeholders | |

Planning notes for Umbrella

Security should not be designed around assumptions.

Schedule a planning consultation

Commercial security planning, installation, integration, and long-term support across Chicago and Northern Illinois.

[Request an Access Control Planning Consultation](#)