Sargent
SofLink Plus 3™
Access Control Software
User Manual

SARGENT®

Sargent SofLink Plus 3
Software User Manual \ Help File
A7720 Rev A

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1 Using Online Help

1.1 Using Help

SARGENT®

Hardcopy Version

Some references in this manual are designed for use with the electronic version. The electronic version can be found in the following folder :
C:\Program Files\Sargent\SofLinkPlus3\Program\SofLinkPlus3 .chm

Electronic Version

An electronic help system such as this one for SofLink Plus quickly displays advice and instructions about the SofLink Plus software when you click on the Help item in your menu bar or by pressing **F1** when any form is open. You can obtain this online help without interrupting the work you are doing and without looking through a paper manual.

This help system is context sensitive, meaning that if you press **F1** while the User Edit form of the program is open, then the help file will open to the topic that describes editing users.

After the SofLink Plus Online Help window opens, you'll see a choice of tabs: Contents, Index, Search and Favorites

- Click the **Contents** tab to browse through topics by category, much like the Table of Contents to a book.
- Click the **Index** tab to see a list of index entries: either type the word you're looking for or scroll through the list.
- Click the **Find** tab to search for words or phrases that may be contained in a Help topic.
- Click the **Favorites** tab to save a bookmark to certain Help topics for quick reference at a later time.

2   Foreword

About This Manual

This manual is designed for users of International Electronics SofLink Plus 3 software. All installation, setup, and operational information and procedures, plus accompanying and screen captures and other relevant material is contained in this manual.

Safety Warnings and Cautions

When handling a printed circuit board, to guard against possible static discharges, touch a grounded object BEFORE touching the board. Static shock can render the product unusable.

Design Change Disclaimer

Due to design changes and product improvements, information in this manual is subject to change without notice. Sargent assumes no responsibility for any errors that may appear in this manual.

Reproduction Disclaimer

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Technical Support

Should you experience any difficulty installing or operating the SofLink Plus software, please contact your installation/service company.

Using this Manual

This manual, your reference to the SofLink Plus software, accompanies the SofLink Plus software installed with your access control system. This manual contains the following topic sections, along with others:

Overview

provides a description of this softwares functionality

System

explains the menu choices available on the System menu

Database

describes the various program databases

Communications

details how to use the Database, Time and Date, and Log Retrieval functions

Tools

details the Tools menu options. Specific options: log archiving, audit archiving, database backup/restore, run com port test, external tools, scheduled log import, table initialization, indexing, and application Initialization

Reports

supplies procedure for selecting the various types of available reports and shows examples of each

SofLink PDP PDA Software

describes Sargent's SofLink PDP PDA software and explains how to install it

Obtaining Technical Support

describes how to obtain technical support for this software, and how to prepare to make a technical support request

Glossary

contains commonly used terms and definitions.

Manual Conventions: Keys, Selections, and Commands

The type style, terminology, and references to important information used in this manual are intended to make the manual easy to use. The following sections describe these conventions.

The following terms are used to indicate commands, which you must execute, or selections you must make, using the mouse or keyboard:

Bold Face Type

All keyboard keys you must press or menu items you must select are highlighted in bold face type.

<F7>

Keyboard keys you must press are contained within carets.

<Alt> <F>

Represents a Windows accelerator key or combination key you must press. Hold down the <Alt> key, then press the indicated key. Click The "Click" command means you must click the LEFT mouse button once, unless the right mouse button is indicated (as in "Right-Click"). [For command buttons, you can also use the Windows accelerator key (<Alt> plus the underlined character) associated with the item to activate the item. For example, the accelerator key for the Start menu's Run... command is <Alt>+R.]

Double-Click

Indicates two rapid clicks of the left mouse button. [You can also select the specified item by highlighting it (using the arrow keys or <Tab> key), pressing the space bar to select it, then pressing the <Enter> key.]

Select or Highlight

Select or highlight an item by clicking on it.

Press

Press the specified key or keys on the keyboard.

Drag

The "Drag" command follows standard Windows usage: select the desired item, click and hold down the left mouse button, move the mouse pointer to the desired location, then release the mouse button.

Menu Selections

When a series of two or more menu choices is presented, the menu commands are separated by a vertical bar like this: System | Login. A menu choice is always specified by its complete choice path. That is, the Main menu selection is given first, along with any subsequent menu selections needed to get to the final menu choice. For example, Database | Doors means first choose Database from the Main menu, then choose Doors.

Save and Back Commands

Most dialog boxes contain two command buttons that are used to close the dialog box: Save and Back. When you click the Save button, the program saves the current data to the database, and returns to the previous screen. When you click the Back button, the program returns you to the previous screen, without saving the edits.

Window Types

This software uses Microsoft Windows conventions and terminology regarding how information is presented on screen. In general, information is displayed in bordered windows called "dialog boxes," or "windows," or "screens" , or "forms". For further information, refer to the Microsoft Windows documentation. The table on the next page lists the four dialog or window types used in this manual.

Window or Dialog Type Description

Application dialog Used for operator data entry, or to present information for operator selection; usually referenced by the title of the application dialog, such as "Password dialog."

Confirmation dialog

Presents the "OK" or "Cancel" command button choices to accept or reject an action.

Main window

Displays initially whenever the software starts up; contains a menu and command buttons that provide access to program functions.

Message box

Presents information that the operator must acknowledge.

Dialog Tabs

Some dialog windows or boxes use a tabbed display to categorize information. See the example below. Clicking on a tab displays the information or data entry items associated with that tab. The location of such information is referred to by the name of the tab, such as the Door Settings tab or the Time Zones tab.

3   Installation

3.1   Installation

This section provides a general description of the Sargent SofLink Plus 3. It also supplies procedures for installing or using various SofLink Plus 3 software components. SofLink Plus is an access control management program for Microsoft Windows operating systems (98/2000/XP) used in conjunction with Sargent's access control equipment.

Operating Systems

SofLink Plus is qualified to work on Win 98/2000/XP.

All software must be installed using an Windows Administrator password, but the program can be used by a standard Windows logon. Failure to install the applications may result in error messages and an incomplete installation.

Installing the SofLink Plus software onto the PC

1. Insert the installation CD. NOTE: On most computers, the Autorun program launches automatically. If it does not, click **Start | Run**, browse to the CD-ROM drive, select the **Autorun.exe** file, then click **Open** and **OK**.
2. Click **Install SofLink Plus 3**, the top choice in the screen. The Install program displays a Welcome screen.
3. Click **Next**. The Software License Agreement screen displays.
4. Use the scroll buttons to scroll through and read the agreement. Signal your acceptance of its terms by clicking **Yes**.
5. Use the scroll buttons to scroll through and read the information, then click **Next**. The Start Copying Files screen displays.
6. If the listed current settings are acceptable, click **Next**. If not, click **Back** and change the desired settings. Various "Copying files" messages display while the installation continues. When the installation finishes, the Setup Completed screen displays.
7. It is highly recommended that you view the **ReadMe** file because it contains late breaking information, which may not be in this documentation at time of print.
8. Click the corresponding check box and **Finish**.
9. The SofLink Plus 3 installation is complete.

Installing the SofLink PDP software onto the PC

See the PDA Software section for a description of the SofLink PDP PDA software.

4   Overview

4.1   General Overview

Additional information not contained in this manual may be found in the ReadMe.txt file located at:
Start | Programs | SofLink Plus 3 | ReadMe

Operating Systems

SofLink Plus is qualified to work on Win 98/2000/XP.

All software must be installed using an Windows Administrator password, but the program can be used by a standard Windows logon.

Starting SofLink Plus

Once the SofLink Plus program is installed successfully, you can start it in two ways.

1. Double-click the **SofLink Plus** shortcut icon that the install program placed on your computer desktop.
2. Select **Start | Programs** and double-click on the **SofLink Plus 3** shortcut. The SofLink Plus Main window displays. (The first time you start the program, you are prompted to enter Contact information in a small dialog box. Enter this information and click **Save** to save it.

Entering Your Login

The default login name is "SARGENT" and the default password is "SARGENT" (upper case for both).

Changing Initial Password

Sargent strongly recommends that you change the factory-default initial Password of "SARGENT" (and write it down and store in a safe location) as soon as possible after installing your SofLink Plus software successfully.

Go directly to **Database | Operators** and edit the operator in the system. This default operator can not be removed, and none of the associated options can be disabled. The "name" and "password," however, can be changed. You also use this special operator to change the Contact information in the Help|About box. If you forget the login name and password, please contact your installer. If you ever choose initialize to the "operator" database, the default of "SARGENT" and "SARGENT" will once again work.

Major Features in SofLink Plus 3

Password Security

This feature requires password entry before allowing an operator access to SofLink Plus software functions. A 2-part login is used. This password should be changed after initial installation, periodically thereafter, and whenever the list of personnel who use the software changes. The factory default login is name: SARGENT password : SARGENT. (Names and Passwords are case sensitive)

Main Screen

This dialog box provides organized access to the setup information used to configure the Secured Series Access Control System. "Power" software users can employ the toolbar buttons for fast access to all functions, without having to use menu commands for navigation. New and occasional software users can access the same functions via the SofLink Plus menu system, eliminating the need to rely on the user's memory for the location of each function in the

software.

User List

The SofLink Plus User List provides a convenient means of specifying the card & code number of individual users for any or all of the doors in the Secured Series Access Control System. An available wizard lets you import names from a CSV file when creating users.

Transaction Logs

The Secured Series Access Control System can maintain a log of access control transactions. The SofLink Plus software can be used to retrieve the transaction logs, save them to disk, and view and print them. Transaction logs are saved (exported) in a comma-delimited format, the default format for data import used by Microsoft Excel.

Operator Logon

Unlimited operators can be created; each operator can be assigned permissions to any combination of screens; each operator can be assigned "Read" or "Write" access to certain areas. Name and password are case sensitive. Operators can be established without a password by not enabling the password for that operator.

Time Zones

Unlimited Time Zones can be created; each door can choose up to 8 time zones from that list. Each Time Zone must be named uniquely. **Auto Unlock Time Zones:** Of the 8 time zones that are assigned to a door, each one can be designated as an Auto Unlock, which works as an auto unlock for that door only, as long as that particular door has

Auto Unlock Time Zones

Of the 8 time zones that can be assigned to most device types, each one can be designated as an Auto Unlock, which works as an auto unlock for that door only, as long as that particular door has Auto Unlock enabled.

Sites

A single "Customer" is controlled with SofLink Plus 3. Any number of ' Sites' can be added. These sites share users from the same list of 10,000 users. The current connection type for all sites is a PDA connection.

Creating New Site with Another Site's Attributes

When a new site is created, it can share any combination of users by modifying the Access Levels to include the new doors created in that site.

Doors

Each site can control up to 300 doors.

Door Time Zones

Only time zone names are shown on the screen when a certain door is selected in the Access Levels screen. You can click on any of the time zones to see the detail.

Door Type Selection

Enables features supported for that door type.

Door Time Zones

Only time zone names are shown on the screen when a certain door is selected in the Access Levels screen. You can click on any of the time zones to see the detail.

Access Levels

Virtually unlimited access levels can be created. Each must be named uniquely (example, "Manager") and can be assigned access to any combination of doors with in that "Customer's" system. Access Levels also maintain some settings that a user has when trying to access those doors selected in that access level, such as "User Type" (standard, passage, log dump, or relock). Access level also specifies the "Time Zones" applied to a user. The time zones can be different for each door.

Users

10,000 users total. A subset of users from the list of 10,000 users can be stored in each of the controllers in the system based upon the user capacity of the door controller type. Users are not added to doors directly, but are assigned to an Access Level that has doors assigned to it.

An available wizard lets you import names from a CSV file when creating users.

Users Not Assigned to Doors Directly

only name, code, card and access level settings can be set up on the user screen. Users are not assigned to doors but instead are assigned to an access level. The access level has doors, user types, card/code types, and time zones assigned to it. Making changes to the access settings for all users that are part of the same access level, is quick and easy. Plus, adding a user to be part of a pre-existing access level only requires the new user's name and code to be defined.

Add User Group

you can add a group of users with common settings such as access level, sequential card numbers, random generation of code, and assignment to time management group.

Holidays

16 single date holidays per system. single date Holidays are sent to all doors (controllers) in all sites.

16 block holidays per system. Block holidays are sent to all controllers in all sites which support block holidays; currently Profile Series G1.

Exporting to Doors

An operator can export all settings or just the changes made to a site to a single door or any combination of doors. The software tracks the doors to which changes are made. Exporting just the changes to a door is less time consuming if only minimal changes were made, such as adding a new user. The initial export to a door takes the most time because all of the data is new. Each individual site **must** be 'connected to' before exporting. Once connected to a site, you can choose to export to all doors in that site.

When exporting with SofLink Plus software for the first time, Sargent recommends that you uncheck the "export changes only" option. This recommendation applies to existing devices as well as new devices. This ensures that all the data in this controller is over written with data that has been created by SofLink Plus.

Importing of Door Data

Allows you to print the imported hardware settings and re-enter the data manually into the program. This feature may not be available with controllers that are managed via PDA software. Access Level relationships are not stored in the controllers. In the case of a hard drive crash, all access levels are lost and cannot be imported from the hardware, making a rebuild of the system extremely difficult if not impossible for complex system setups. Restoring from the database backup that was stored on removable media is the best way to recover from a system crash, because all data including the Access Levels are also restored.

Export Time/Date

Allows you to set the time/date in the controllers. You cannot export the time or date directly to a PDA connected controller from the PC software. For PDA connected controllers the PDA software has the ability to send the time to the controller using the time and date of the PDA itself.

For directly connected controllers (if available), the PC's clock is used. Each site must be connected to before Time/Date can be sent to any doors in that directly connected site. Before performing this function, verify that the Time and Date on the PC are correct.

Importing Transaction Logs

You can choose any combination of the doors within a site to import the transaction log from and then press Start to start the import process; the software performs this import sequentially, automatically. All new transaction log data is appended to the existing transaction log data. You can also choose to import all doors in all sites by choosing Import Log From All Sites .

Scheduled-Import of Transaction Logs

You can specify the time that Auto-Import is to occur. You can also set the delay (in days) between Auto-Imports. Auto-Import attempts to import from each door in each site. It will attempt to connects to each of the other sites automatically, dependant upon connection type. It attempts an import in this fashion for each site in that customer's system. All new transaction log data is appended to the existing data. You must log out, but not exit, for auto log retrieve to work properly. If an operator is logged in, the log retrieve will not start automatically.

Opening Saved Transaction Logs or Reports for Viewing

The Operator can open the current transaction log file (containing the log information for all doors that were imported from) for viewing as well as opening archived transaction logs. If a log is saved to an archive file, it can be opened in a program such as Microsoft Excel. Most reports are stored in comma-delimited format, but some are stored in space delimited format.

Archiving Transaction Logs

The current Transaction Log, which can consist of data from any combination of doors, can be **moved** into an Archive file if you no longer wish to use it in the new reports of SofLink Plus. If you perform Archiving, the Transaction Log data is now available in this Archive file. The Archive file is in CSV format, which means that you can easily open it in a CSV viewer such as Microsoft Excel.

Open an Archived Transaction Log

This option lets you load an archived transaction log file into the current transaction log file for viewing.

Network Query

Network Query reports Online\Offline, and Controller Type. Pictograms are used to display this information. It only queries the site you are currently connected to, and it attempts to query the 300 doors that can be at that site, one at a time.

If you are performing a network Query on an PDA connected site, then the Network Query cannot speak directly to the controller. In this case the Time and Date of the last imported Log Event will be displayed, which is useful if you would like to know the last time this device was communicated with using the PDA software.

Operator Audit Trail

The software maintains a time/date-stamped trail of which operator logged in, a brief description of the screens that operator accessed, and a brief description of what was done in each screen.

Exact details telling exactly what was changed are not given. (Example: operator John Smith logged in; Door 1 was added or modified). No filtering of the audit trail is possible to produce a customized report within SofLink Plus, but it can be printed to a file and opened in another program such as Microsoft Excel or Crystal Reports.

Operator Audit Trail Archiving

Provides the ability to move the operator audit trail to an archive database.

Database Initialization

WARNING: Performing this operation will result in a loss of data. Please perform a backup first. All existing data will be lost.

The operator can select to initialize the database, just the Transaction Log, or just the Operator Audit trail or. Initializing removes all data that was entered or stored in a particular database. This is a quick way to clear all data from a certain database. It does bring all databases back to a default state.

Database Backup

Allows you to create a backup of the existing databases. These backup files can then be copied to a removable media. If the computer's hard drive crashes, you could reinstall SofLink Plus and then copy the backup files back to the Backup folder and then Restore these files.

Database Restore

Allows you to restore SofLink Plus data from the backup files stored in the backup folder. This would allow you to recover from a hard drive crash or to go back to the settings stored in the backup folder. If a backup was placed onto removable media, you must first copy the files back into the backup folder and then perform the database restore routine.

Database Conversion\Migration (if available)

A utility may be available that allows you to migrate your data from a previous version of SofLink Plus or another access control program into SofLink Plus 3. This utility (if it exists, named "Conversion.exe," may be located in C:\Program Files\SofLinkPlus3\Program

Transaction Log Report Filter

Allows you to customize the transaction log report to show only those items that meet the filter criteria, such as a date range, a specific user, a specific access level, any combination of doors, any combination of events, or just the time management group.

Time Management Report

this report tallies the total time in the building for each user per day as well as subtracting break time from the total time and gives that number also. This report requires controllers that can produce both "User IN" and "User OUT" events. If the controllers in the system do not have both User IN and User OUT events, this report can not calculate the amount of time a user was "IN" the building.

Misc. Report

this report shows briefly what days a user was granted access on a certain day.

Presence Report

this report is based on a date range. It displays which days of the range the users were granted access

Database Report

this report shows all programmed items within a certain database.

Help File

Help file is included, you are now reading it, either electronically or in hardcopy format.

Electronic Version: pressing F1 on any form will bring up a help topic relevant to the form you are currently viewing.

Printing to Display, Printer,or File
Every place that printing is available, a standard screen prompts the user where to print the data: display, printer, or to a space delimited file. This is a default format for importing text files into Microsoft Excel.

NOTE: To use this feature, a printer driver must be installed on the personal computer. If you are not using a printer for your personal computer and have no printer drivers installed, add an ASCII printer driver from your Windows CD-ROM.

Default Time Zones
One time zone 12:00 AM-11:59 PM, including all days of the week and holidays. This can be used for 24-hour users, that you want to give 24 / 7 / 365 access to.

Default Users
Master Code with a code of 1234, and a Supervisor User with no code defined. For a complete listing of all user types and the devices that support the different user types, see the Access Levels topic.

Default Holidays
No default holidays are defined.

Default Operator
One default operator is set up (which is case sensitive, all upper case for both) with the name "SARGENT" and password "SARGENT" This operator can not be deleted nor can any option be disabled. This default operators name and password, however, can and should be changed soon after installing this software, for security reasons.

4.2 Menu System

Describing the Menu System

The menu system of the SofLink Plus software includes the following commands:

SYSTEM
> Login
> Logout
> Change Password
> Exit

DATABASE
> Time Zones
> Sites
> Doors
> Access Levels
> Users
> Holidays
> Operators

COMMUNICATIONS
> Import Log
> Import All Sites
> Import Door Settings
> Export To Doors
> Export Date/Time
> Network Query

TOOLS
> Log Archiving
> Audit Archiving
> Database Backup/Restore
> Run Com Port Test
> External Tools
> Scheduled Log Import
> Table Initialization
> Indexing
> Application Initialization
> Options

REPORTS
> Log Filter
> Attendance
> Misc Reports
> Database
> Audit
> Archive Viewer
> Generate Database for External Report Writer
> Scheduled Log Import Errors

HELP
> About
> Help (you're reading it now)

System Main Menu Commands

The System main menu commands provide access to SofLink Plus functions that are used for system configuration or maintenance.

System

Provides a means of:
- "logging into" the program
- "logging out" of the program
- modifying current login password for the currently logged in operator
- creating, deleting switching between other SofLink Plus databases
- exiting the program

Database

Contains options necessary for setting required system parameters to operate the door controllers, according to rules established for secure access to protected areas.

Communications

Allows you to import the transaction log, which documents user activity from individual door controllers to the personal computer database.

Tools

Permit you to maintain the program's databases, back up the databases, ensure proper communications with door controllers, as well as gain access to other utilities.

Reports

Supplies tools for processing and extracting of data from the program's databases, such as summary forms, user lists, user activity lists, forms, etc.

Help

Supplies access to SofLink Plus online help information.

Selecting the System Menu Item

The System option contains menu choices that allow you to log into the system, log out of the system, change your password, and exit from the SofLink Plus program. Select **System** from the SofLink Plus main menu. The System drop-down menu displays.

4.3   Running the software

Once the SofLink Plus program is installed successfully, you can start it in two ways.

1. Double-click the **SofLink Plus 3** shortcut icon that the install program placed on your computer desktop.

2. Select **Start | Programs** and double-click on the **SofLink Plus 3** shortcut. The SofLink Plus Main window displays, with the Login form.

NOTE: The first time you start the program, you are prompted to enter contact information in a small dialog box. Enter this information and click **Save** to save it.

Entering Your Login

The default login name is "SARGENT" and the default password is "SARGENT". Both are case sensitive.

Navigating through the Program

The following steps depict the path of a "typical" user through the software. Your situation may differ somewhat.

1. Install the hardware successfully and program the door address into each door controller (if required by that device type); next, make all the necessary "controller-to-PC" wiring connections (see the hardware manual for programming/installation details).
2. Change the default Login (Name and Password) as soon as possible after installing the SofLink Plus software.
3. Go to the Overview chapter and read this material to learn the basic concepts behind setting up Doors, Access Level management, and Users.
4. Run the SofLink Plus program.
5. Create all of your Sites using **Database | Sites Add** button.
6. Run Network Query with the "Add New Found Doors" checkbox checked so that the program identifies all new found doors on your local site to the SofLink Plus database. Add the descriptive door name to each new door for identification purposes.
7. Connect to the sites by going to **Database | Sites,** then selecting the site you want to export to, and then select the **connect** button.
8. Diagnose the customer's system by identifying the common groups of users that have identical access privileges (Access Levels). Identify the different possible groups such as managers having 24 hour access to all doors in all sites, a cleaning crew that only has access on the front doors at certain times of the day and week, 1st, 2nd, and 3rd shift workers that only have access during their respective shift periods, normal Monday through Friday 9-5 AM employees, etc.
9. Create the Time Zones needed for your system requirements.
10. Create Holidays as applicable.
11. Go to the individual Doors and assign the Time-Zones needed in each door.
12. Go to Access Levels and start creating the Access Group privileges for that Access Level based on the diagnosis. Each door is set up independently.
13. Go to Users and create the names and define the PIN and/or Card data fields.
14. Choose **Communications | Export to Door** to export, and then connect to each of the other sites using **Database | Sites** and click the **Connect** button and then choose **Communications | Export to Door** to send to the doors in that site. Repeat for each site.
15. If you are managing PDA connected controllers, when you are finished exporting to all doors in all sites, you will need to cradle your PDA and run HotSync in order to send the data from the PC to the PDA. Once this step is complete, you will then visit each door controller at which time you will synchronize the data. You should then return to the PC and perform a final HotSync which will let the PC host program know that the data made it to the PDA managed controllers successfully.
16. If you are connecting to a directly connected controller: choose **Communications | Export Date/Time** to export to the currently connected site, and then connect to each of the other sites using **Database | Sites** and click the **Connect** button and then choose **Communications | Export Date/Time** to send to the doors in that site. Repeat for each site.

4.4   PDA Software

Profile Series G1 SofLink PDP PDA SW

SofLink PDP is Sargent's PDA software designed for communication between SofLink Plus and Profile Series G1 controllers. Sargent's Profile Series G1 controllers are standalone battery operated fully integrated electronic access control door locks. These controllers have two way IR communications capability. By employing a PDA and the SofLink PDP SW, Profile Series G1 controllers can be part of an overall access control system all managed by SofLink Plus.

SofLink PDP System Requirements

The following are a list of required equipment in order to use SofLink PDP PDA software

- Sargent's SofLink Plus 3 software
- PDA with Palm OS 3.5 or 4.1 (Palm OS v5 is not currently supported)
- HotSync software (provided by PDA vendor)
- 250KB of available memory on the PDA for each Profile Series G1 you are managing.

SofLink PDP Software Installation

Refer to the Installation section for additional details.
1. Click **Install SofLink PDP** (on the SofLink Plus install CD)
2. The installation program will attempt to find the folder where Palm Desktop was installed. It the application cannot be found in the standard default location, you must browse to the folder where Palm.exe is located. This is useful if Palm desktop was not installed into the default location and the SofLink PDP installation program cannot find it. The SofLink PDP Installation (installed from CD) has been modified to allow the installer to browse to the folder where the Palm Desktop program was installed.
3. The install program displays a Confirmation Screen. This message is displayed to remind the user that Palm Desktop and Hot Sync Manager software must be installed prior to installing SofLink PDP software. If either of these applications are running, then the installation will ask if you want it to turn them off for you. The install will not continue until both applications are closed.
4. Click **OK**.
5. Following the steps in this screen will result in the SofLink PDP software being loaded onto the PDA the next time the Hot Sync Manager is run.
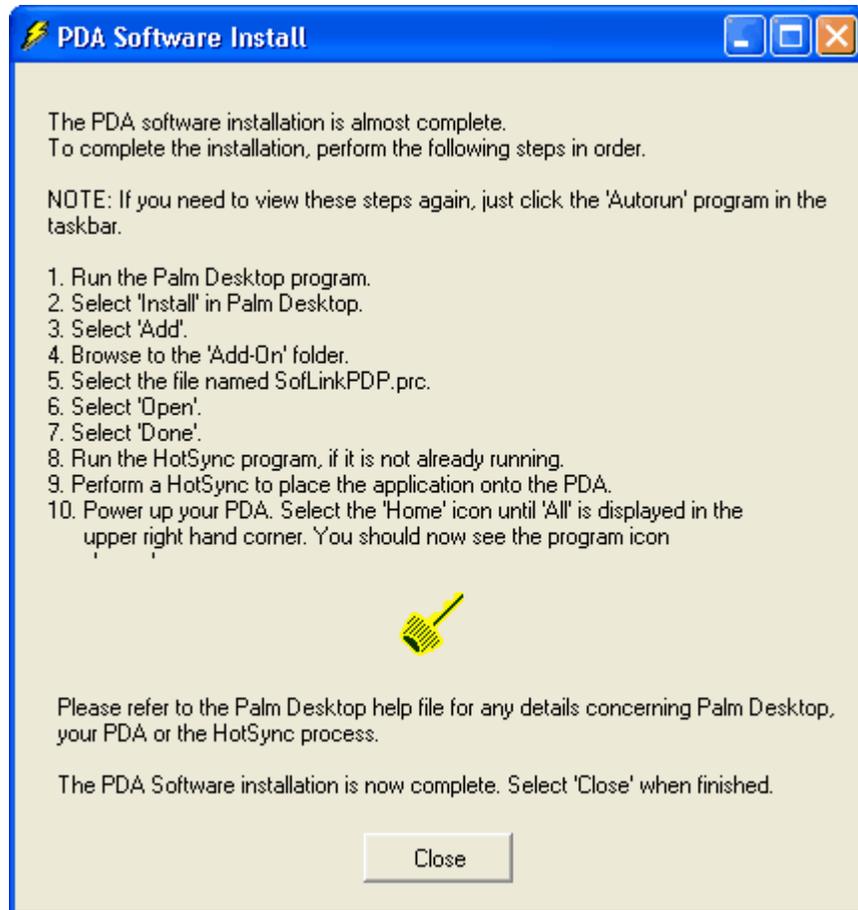
5. After completing the Hot Sync setup instruction, the SofLink PDP program icon will appear in the applications screen of your PDA (see figure below).

PDA Data Transfers

The PDA acts as the "connection" between Profile Series G1 controllers and SofLink Plus. Data transfers in either direction must occur in a series of operations, involving the intermediate HotSync step.

Exporting From SofLink Plus to the PDA

When exporting to a PDA connected site, SofLink Plus creates data files that will be transferred to the PDA the next time a Hot Sync Manager session is executed. Refer to the Export to Doors section for details on exporting data.

1. Connect to the Profile Series G1 site.
2. Export data to the devices.
3. Set the PDA in its cradle.
4. Initiate HotSync on the PDA.
5. Take the PDA to the controllers and export to each door using the **Imp/Exp** button in SofLink PDP, and follow the prompts
6. Go back to the PC and set the PDA in its cradle.
7. Initiate HotSync on the PDA. Log data is now on the hard drive awaiting import into SofLink Plus.
8. Connect to the Profile Series G1 site, if not already done.
9. Choose **Communications | Import Log**
10. All data between SofLink Plus and the controller is fully synchronized.

SofLink PDP automatically handles all existing door data during the Hot Sync Manager process. All door export data from the SofLink Plus stored on the PDA prior to the start of the Hot Sync Manager session is deleted from the PDA memory. All log event data from the doors stored on the PDA prior to the start of the HotSync Manager session is transferred to the PC for import by SofLink Plus. Once the Hot Sync Manager has completed run SofLink PDP from the PDA Application Screen. SofLink PDP's main screen has three buttons and a Site drop down list. The title bar info symbol is functional in all SofLink PDP screens. Selecting the info symbol will provide you with definitions and descriptions of the features/functions and data presented in the current screen.

Imp/Exp Button

Initiates communication services. Communication services are: door identification, download of event data from a controller, and upload of new configuration data to a controller.

Files Button

- Display the door management screen and provides access to advanced functionality.
- Any door with a checkmark in the C column denotes that data is stored on the PDA that has not been sent to the relative controller. This is useful to know what doors you still need to visit.
- Any door with a checkmark in the L column denotes that transaction log data is on the PDA that has not been transferred to the PC via a HotSync operation.

Settings Button

Displays settings for the SofLink PDP program itself.

Site Drop Down List

Contains an alphabetical list of the Sites that door data exists for in the PDA's memory. The Site shown in the Main Screen is the currently active site. All operations within SofLink PDP are performed on the currently active site. When SofLink PDP is launched, the Site Drop Down List will now contain a single entry for each site for which doors were exported. The list is arranged alphabetically and initially, the active site is the first on the list.

Setting Up Your PDA to Communicate with Profile Series G1 Door Controllers

We can now select a site from the Site List in the Main Screen. If you only have a single site, it will be automatically selected when SofLink PDP is launched. After you have selected a Site, select the Settings button. The Configuration Screen will appear. SofLink PDP offers a number of program preferences that can be selected in this screen. These items are global – meaning they influence the way SofLink PDP functions as a program independent of the currently active site.

The Configuration Screen has four settings: Auto Export Time/Date, Auto Import Log, Comm Method and Comm Speed.

Auto Export Time/Date

When selected, SofLink PDP will automatically update a device's stored time and date whenever communication is established with a device. This option is turned on by default. It can be turned off if you know the Time of the PDA should not be sent to the controller, in the case where you are crossing over a Time Zone boundary.

Auto Import Log

When selected, SofLink PDP will automatically retrieve the event log from the device without prompting the user. When this option is not selected, SofLink PDP will display a message box letting the user know how many events the device contains and prompt them to choose to retrieve the log if they desire. This option is turned off by default.

Comm Method

Drop-down list allowing selection of how SofLink PDP is going to communicate. IR Channel 1, 2, and 3 are used to select what IR package the PDA hardware has. The default is IR Channel 2.

Channel 1 - Select this option if you are using an older Palm OS PDA such as the Palm IIIxe.

Channel 2 - Select this option if you are using a Palm OS PDA such as the Palm m130. Typically these devices will have Palm OS v3.1 to v4.2. Do not make this channel selection if you see an OMAP logo on the back of the device.

Channel 3 - Select this option if you see an 'OMAP' logo on the back of the Palm OS PDA. This setting is common for Palm OS PDA's that have Palm OS v5, but is not true for all PDA's that have Palm OS v5.

Comm Speed

Drop-down list allowing selection of the baud rate to communicate to the device. The default setting is 19200 for Profile Series G1 controllers and should not be changed.

Exporting and Importing Data Between the PDA and the Door

- To find out which doors have new Configuration data to be delivered, select the **Files** button on the Main Screen. The Door Management Screen will appear.
- Using the **Files** button on the main screen accesses SofLink PDP's Door Management screen. The Door Management Screen displays a tabular list of each of the doors within the active site. The table is made up of 3 columns: 'Door Name', 'C L', and Action.

Door Name

The text ID given by the user to the PC software to identify the particular device.

'C L'

Indicates what operations are pending for the door. A checkmark gets placed beneath the 'C' when SofLink PDP has new configuration data available to upload to the device. A checkmark gets placed beneath the 'L' when SofLink PDP has received new event log data from the device that is pending return to the PC via a Hot Sync. Note some doors contained on the PDA may not

have new configuration data.

Action

Is a drop-down list of advanced functions that can be invoked to act on the door. these actions include checking the current Time/date on the controller, or looking at the current configuration details.

Communicating with a Door

1. Select the **Imp/Exp** button of the SofLink PDP main screen and point the IR port of the PDA at the IR port of the Profile Series G1. SofLink PDP will now prompt you to unlock communications at the door device. Note that the optimal distance between the PDA and the Profile Series G1 for IR communications is approximately six inches. Longer export and import times will result from putting the PDA either too close or too far away from the Profile Series G1, because of lost communications resulting in retries.

2. Enter a valid Communications User code at the controller. See The Access Levels section for more details on using Comm Unlock codes. The Master Code can always be used to unlock communications (the Factory default Master Code is 1-2-3-4-*). The IR communications port of the Profile Series G1 is located to the right hand side of its keypad. Refer to your Sargent controller installation and Programming Guide for further instructions. Once the door controller's communications have been unlocked, point the IR port of the PDA at the port on the door. If this is the first visit to this door, SofLink PDP prompts you to select the door from the list.

3. SofLink PDP will provide a list of all of the doors for your active site for you to make your selection. In our example, to make the selection, highlight 'Front Door' on the list and select the 'Choose' button. SofLink PDP will prompt you to confirm your selection. When you visit this door again, SofLink PDP will automatically recognize that you have communicated with

this door before and will only prompt you to confirm the door name.

4.   SofLink PDP determines whether the configuration data stored on the PDA is 'newer' than that in the device. If the data is newer, you will be prompted with a choice to send the data to the device or not. Upon selecting 'Yes', SofLink PDP displays a status bar and transmits all new data to the device. A full export of all 2000 users may take about 1.5 minutes. For security reasons, a full export will occur if you have entered programming mode on the controller, or if you have changed the door or site name in SofLink Plus. Normally, only changes are sent, taking a few seconds.

5.   When finished, SofLink PDP displays a 'complete' message. After completion of the Configuration Data export, SofLink PDP will continue to establish communication with your door. SofLink PDP will query the door to find out how many events it has stored and prompt you with a choice to retrieve them or not. For demonstration, select 'Yes'. SofLink PDP now displays a status bar and retrieves the events from the door.

5   System

5.1   Initial Set Up

Organizing for SofLink Plus Access Control

Getting ready for programming your SofLink Plus access control system is a simple matter, as the software employs the concept of "*facility work groups-schedules*" for access control. This section describes the concepts involved and provides relevant procedures.

Facility Work Groups

To create and control electronic access for each door in your facility, the SofLink Plus software uses facility work groups; examples include office workers, supervisors, or work shifts combined with their corresponding normal work times, days, and the doors they can access normally. This latter idea is known as "Access Levels." It minimizes required software programming to a simple action of transferring a mirror image of the existing facility's employee work groups and schedules into the corresponding SofLink Plus software screens. Access is granted by issuing each person a card, Personal Identification Number (PIN) number, or both, assigning each person to an identified facility work group called Access Level (an access level is a combination of each person's work group, doors, times, and days), and then downloading this access level data to the controllers.

Creating Access Levels

1. Create Access Levels by first identifying and grouping employees according to the following parameters:
   - logical work groups such as office, factory, supervisors, and marketing the employees assigned to each work group
   - the normal group work schedule for each work group
   - the doors that each work group can access
   - the times that each work group can access the specified doors
2. Once you finish identifying and grouping employees, transfer this access level information into the corresponding software screens ("forms") used to program facility access control parameters into the SofLink Plus software.
3. When you finish transferring access level information into the software screens, download each completed software screen ("form") into the system's controllers, to control specified door access with Readers and Keypads.

Database Programming Screens ("forms")

The major SofLink Plus database programming screens (a.k.a. forms) include:

Time Zones
Input logical facility work group schedules by days and times
Sites
If more than one location is involved, input and identify the additional sites in this form
Doors
Identify each controlled door by name and specify a few basic monitoring parameters here
Access Levels
Combines the doors and times into an assignable access control structure that can be assigned to each user
Users
Assign each employee or visitor an access card, PIN, and or both combined with an access level that can control employee or visitor access by door, time, day and even holiday automatically

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Preparing for Access Control Programming

Use normal employee work times to create logical automated access control by group and doors as follows:

1. For each site in your facility, identify and list all doors to be controlled by name and location.
2. Example: Lobby, Computer Room, Accounting, Manufacturing, etc.
3. List the groups of people who work at or regularly visit the facility, their normal work schedules, and the doors they can access.

   Examples:

   General Office Workers
   8 AM through 6 PM. M-F
   Lobby, Employee Entrance, Computer Room
   Names: (List them here)
   (first and last names)
   General Supervisors
   24 hours a day, 7 days and holidays
   All doors
   Names:(List them here)
   (first and last names)
   Marketing
   7 AM through 7 PM M-F
   All but Accounting
   Names: (List them here)
   (first and last names)
   Tech Support
   7 AM through 7 PM, M-F
   Lobby
   Names: (List them here)
   (first and last names).

4. Transfer the information into the SofLink Plus software as described in the Transferring Work Schedule section.
5. Download the access control information to the controllers as described in the export to doors section.

Transferring Work Schedule

To transfer your current facility's work schedule into the SofLink Plus software, follow subsections below.

Transferring Time Zones

In the SofLink Plus Time Zone programming screen, transfer the times that reflect the various schedules identified in the previous section.
Example: For Time Zone, fill in each line to reflect each separate possibility of times, days, and holidays applicable to your employee work schedules.

General Office Workers: 8 AM through 6 PM. M-F
General Supervisors: 24 hours a day, 7 days and holidays
Marketing: 7 AM through 7 PM M-F
Tech Support: 7 AM through 7 PM, M-F

Transferring Sites

If your system controls more than one site, either by (serial) hard wire or PDA, use the Sites screen in the SofLink Plus software to identify each site, identify its controllers, and establish the

necessary information for communications. Programming, reporting, and communication routes with each site are then linked automatically into the SofLink Plus software.

Transferring Doors

In the SofLink Plus Door programming screen, transfer each door's identification into the system, by entering the door name and Time zones that are active for the door. In this screen, enter the activities to be monitored and reported, such as electric lock timer for ADA, auto unlock-relock, forced door, and door ajar events.

Transferring Access Levels

As noted earlier, the *Access Level* concept allows a single-phase entry method for assigning employees and visitors to the appropriate door and time access control.

1. Using the SofLink Plus Access Levels programming screen, transfer the identified work groups from your list.
2. Assign logical titles for each group's access level by their type of employee work group.
3. Select appropriate time zones and doors.
   Example:
   Marketing: 7 AM through 7 PM M-F
   All doors but Accounting
4. Create an Access Level titled "Marketing," and then select the appropriate time zone number(s) and doors that reflect the Marketing" group.

Transferring Users

Using the SofLink Plus User screen, fill in the names, card, and or PIN number for the person and select the Access Level (for example, marketing, supervisor). This single step directs the software to create each employee's access privileges automatically.

Managing and Programming System Alarms

Door Contacts can be monitored, and door ajar, forced door events annunciated for response.

1. Define how long each door can remain open before the door open event is annunciated.
2. Transfer the identified times for each door's information to the Doors screen in the SofLink Plus software.
3. To annunciate a held open or a forced door event, first define the action to be taken. Examples include "report the event" or "close a relay"; then add this desired action to the door information.

Providing for a Secure System

This procedure involves defining operators and the respective privileges for each.

1. Define which operators are allowed to program the SofLink Plus system and exactly which programming actions each is permitted.
2. Using the Operator screen, specify all tasks/parameters that each operator is allowed to control, change, report on, or save. Each operator has his/her own password for logon and then can access only their assigned tasks.
3. Specify Holiday parameters. Similar to Time Zones, holidays can be listed by date and then participate in any time or access controlled system function.

5.2   Login

To obtain access to the SofLink Plus program's features, you **must** enter the pre-designated login, which consists of two entries, *Name* and *Password,*into the Login dialog box. [The factory-default *Name is "SARGENT"* (all upper case letters); the default *Password* is also *"SARGENT"* (all upper case letters). Sargent recommends that you change the default operator name and password immediately after initial installation.

IMPORTANT NOTE: The login feature is case sensitive. If the *Name* portion is "SARGENT" followed by a *Password* portion of "SARGENT" for example, both must be typed exactly as shown: in all upper case.

1.   Select **System | Login** from the main menu. The Login dialog box displays.
2.   Enter your Name on the first line of the Login dialog box (for example, the factory-default of "system"), press **<Tab>** to move to the second line, enter your Password on the second line (for example, the factory-default of "startup"), and click **OK** (or press **<Enter>** on the keyboard). If you enter a valid 2-part login, the SofLink Plus program activates, giving you access to program options (they are no longer grayed out). If the login is not valid, an "Incorrect login entered" message appears.
3.   If the "Incorrect login entered" message appears, check your login and then re-enter it. After you log on to the system successfully, you can access the specific data and functions assigned to your specific user name by the system administrator.

5.3   Logout

The Logout option permits an individual system user to "Logout" or quit the SofLink Plus program without actually exiting the program. Whenever this option is chosen, to access the program's features once more, a new operator must log into the system again. Select **System | Logout** from the main menu. For example, a reason to Logout and not exit the program is if you enable "Schedule Log Import" under the Tools menu; you must log out but not exit the program completely before the automatic importing of the transaction log can occur.

5.4   Change Login Password

This option lets you change the *Password* portion of your system login. Sargent strongly recommends that you edit the default operator using **Database | Operators** as soon as possible after installing your SofLink Plus software successfully. Make sure to write down the name and password and store them in a safe location.

1.   Select **System | Change Password** from the main menu. The Change Password dialog box displays.
2.   Enter the current password on the first line, the new password on the second line, re-enter the new password on the "Verification" line for confirmation, and then press **Save.**

3. If you have changed the initial *Password* and do not remember your current *Password*, contact Sargent technical support.

5.5 Exit

The Exit option exits you from the SofLink Plus program. Once selected, the SofLink Plus main window closes, and you **must** restart the program to access its features. Select **System | Exit** from the main menu. Upon exiting, the program may prompt you that changes to some number of doors has occurred but these changes have not been sent to the door controller. In addition, a prompt may display stating that Scheduled Importing of transaction logs is enabled. Scheduled Importing can not occur if you exit. For the automatic import to work properly, you must Logout but not exit SofLink Plus.

6   Communications

6.1   Communications Menu

The Communications menu contains most of the options that allow you to send data to a controller or import data from a controller.

Select **Communications** from the main menu. The Communications drop-down menu displays.
Import Log
Import Log From All sites
Import Door Settings
Export Date/Time
Export to Doors
Network Query

6.2   Export Date/Time

NOTE: This PC does not set the Time\Date on PDA connected controllers. Profile Series G1 controllers get their clock update from the PDA's internal clock via SofLink PDP.See the section regarding PDA Connection for details.

NOTE: With the Profile Series G1 controller, there is no need to update the new time and date when Daylight savings takes place. The time in the controller will automatically change, as long as the 'Daylight Savings Time' option is enabled in the Door options.

NOTE: The Export Time & Date option sends the current time and date of the PC or PDA to the controller. If the time and date are not set correctly in the computer or PDA, then the wrong time and date will be sent to the controller.

NOTE: Some PDA's have been found to not automatically adjust for daylight savings time, and require a manual time change by the operator of the PDA. If the operator of the PDA does not update the time properly, then the wrong time will be sent to the controller. To disable the PDA software from automatically updating the time\date in the controller, run the PDA software and choose the 'Settings' button and deselect the 'Auto Update Time\Date' option.

Setting the Controller Time and Date via a Direct Connection (Serial Com Port, USB Port, Ethernet\LAN, or Modem)

The Export Time and Date option lets you synchronize the system's time and date specified in the personal computer with all directly connected controllers.

A vital action that MUST be performed when a system is first set up is to set the time and date on the controllers. If the time and date are not set correctly, the controller will not perform scheduled functions at the correct times, and access will not be denied or granted at the correct times. Select **Communications | Export Time and Date** from the SofLink Plus main menu to access the Time and Date option.

Each site must be connected separately, and the time & date must be sent to each site after a successful connection is established.

Setting the Controllers Time and Date via a PDA Connection

The Export Time and Date option will display a message if the SofLink Plus software is currently connected to a non direct connect method. If this is the case you must use the PDA software to

update the Time and Date.

The default setting of the PDA software is to update the Time and Date in the Profile Series G1 controller any time you communicate using the PDA. The clock of the PDA is used in this case.

6.3   Export to Doors

The Export to Doors option lets you export (transfer) data from the SofLink Plus database stored on the PC to any of the currently connected controllers.

If you are exporting to a PDA connected device, then when you choose to export, the data will be placed in a location where it can be retrieved by the PDA the next time a HotSync is performed. The data is not placed onto the PDA until you run HotSync.
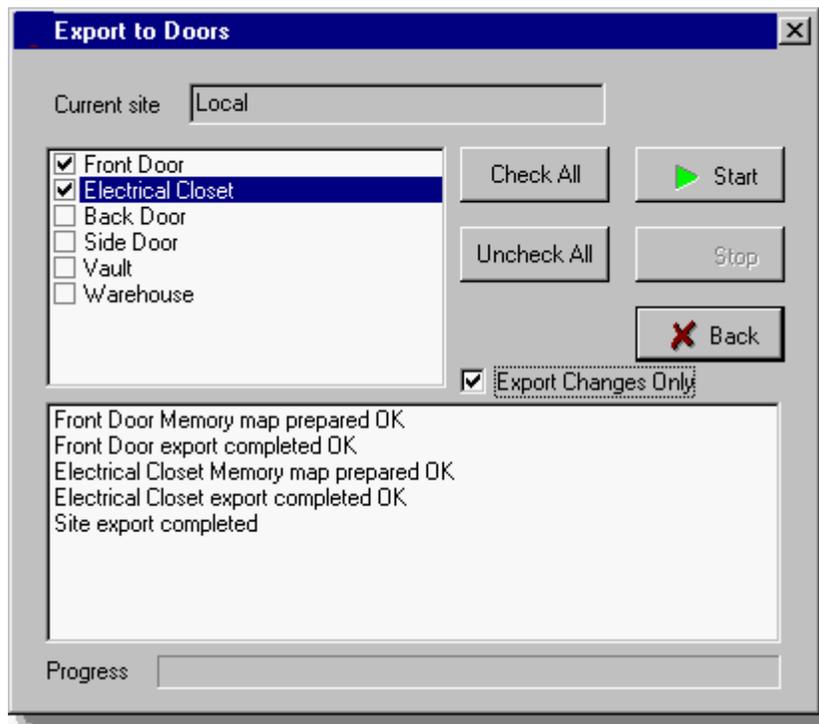
1. Select **Communications | Export to Doors** from the SofLink Plus main menu to access the Upload option. An Export to Doors screen displays (the sample shown above is after the export is complete).

    NOTE: SofLink Plus keeps track of which doors had data modified by the operator. When you enter the Export to Doors form, you may notice that there are already check marks next to some of the door names. If a door has a checkmark next to it, it means that some user data, door data, or time zone data has been modified and/or saved and needs to be exported to this door. If there is no check mark then there is no need to export to this door.

2. Select the doors you wish to export by placing a checkmark next to the name of the desired doors. To begin the Export, click **Start.** The program displays the progress of the export at the bottom of the screen. Any doors that were modified since the last export are selected automatically (noted with a checkmark). During exports and connections to remote sites, the SofLink Plus program also tests for the presence of the security chip (hardware key) in the network of door controllers.

Exporting Door Settings

- Door setting information in the SofLink Plus software is NOT automatically sent to the controllers. After you make changes to the door settings, you MUST transmit them to the controllers using the **Communications | Export to Doors** function.
- The Export function allows you to transmit to the currently connected site: one door at a time, all doors, or select the doors that you wish to transmit.
- If the connection to the controller is not intact, an error message displays. If the connection is intact, a status bar displays, indicating which door is currently being exported. SofLink Plus displays an Export Complete dialog box when the export is complete.

NOTE: For devices that use the PDA to transport data (such as the Profile Series G1), you will now need to run HotSync to get the data to the PDA, and then you can walk around and export to the Profile Series G1 controllers.

6.4   Import Door Settings

NOTE: The Import Door Settings can not be performed on PDA connected controllers.

The Import Door Settings option imports and displays the complete user data and door settings of any physically connected (com port, modem, or TCP/IP) door controller to the SofLink Plus computer. This is useful if the contents were modified from the local keypad, or in case of unknown diagnostic problems with a controller. You can then view, print, or save this information to a .CSV file. This imported information is stored separately from the central SofLink Plus databases in a text file, and cannot overwrite any data in the database.

1. Ensure that the desired site is connected and then select **Communications | Import Door Settings** from the SofLink Plus main menu to access the Import Door Settings option.
2. Enter the door whose configuration you wish to import in the "Door" text box. To begin the import, click Import. The program displays the progress of the import at the bottom left of the screen.
3. To print, view, or save the door configuration import information, click Print and then select your choice of output device. If you select File, you must enter a name for the file in the "Filename" box.

6.5   Import Log

The Import Log option lets you retrieve and store all new transactions from the selected doors of the currently connected site. You must be connected to the desired sites before choosing this option.

1. Select **Communications | Import Log** from the SofLink Plus main menu to access the Import Log option.
2. Select the doors you want to import a transaction log from. To begin the transfer process, click the **Start** button. An Import Log screen displays.

NOTE: If you are importing from a PDA connected site, then you may notice that there is already a checkmark next to some doors. This means that SofLink Plus already notices that you have run HotSync with the PDA running SofLink PDP, and that transaction log data is available for this particular door.
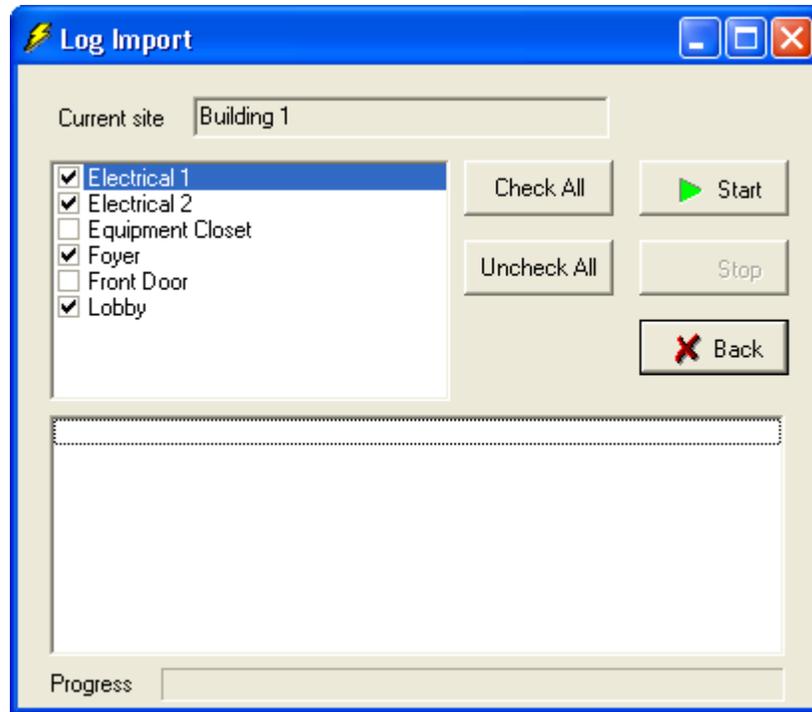
Field/Button Description

Current Site
Identifies the currently connected site.

Available Doors
Lists all doors from which it is possible to read transaction logs. To select a door, double-click it.

Selected Doors
Lists all doors selected for reading transaction log.

Select All/Unselect All
Selects/deselects ALL available doors.

Progress
Displays information about the reading transaction log process.

Process
Displays information about the data transfer status from individual door controllers.

Start/Stop
Starts/stops the data transfer process.

Back
Returns you to the previous screen.

6.6 Import Log from All Sites

Import Log From All Sites Option

The Import Log From All Sites option on the Communications menu lets you retrieve all transaction logs from all doors in all sites. This option auto connects those sites, dependant upon connection type, and then imports the transaction log from all doors in the site. You can also set this function to occur at a certain time of day using the **Tools | Scheduled Log Import** option. Clicking on the "Back" button, during this process, disconnects from the currently connected site.

1. Select **Communications | Import Log From All Sites** from the main menu to access the Import Log from All Sites option. An Import All Sites screen displays.
2. To begin the transfer process, click the **Start** button.

NOTE: For PDA connected sites, make sure that you have cradled the PDA running SofLink PDP and have run HotSync. This will make sure that any log files that came back from the controllers have been placed on the PC and are now ready to import in the SofLink Plus software database.

Field/Button Description

Door

Shows the progress of the door currently being imported.

Total

Shows the progress of the total door import data process, including all doors in all sites.

Start

Starts the import log process.

Back

Returns you to the previous screen.

6.7 Network Query

NOTE: If the site you are trying to Network Query are PDA connected controllers, then the program will simply look for the most recent event in the transaction log and will display that time and date. This is helpful if you want to know the last time the PDA connected controller was communicated with.

The Network Query option scans the door addresses of the currently connected site and displays the online\offline status of the controllers. After the option is activated, the program searches the network of controllers for each "Door Address" starting at door 1 and incrementing each time.

If you want to query a single door, go Database | Doors and open that door for editing and select the 'Query Now' button.

1. Select **Communications | Network Query** from the SofLink Plus main menu to access the Network Query option. The initial Network Query screen displays.
2. Place a checkmark in the "Add new found doors" box to specify that if the program finds any new controllers that are not currently in the system, the program will add these new controllers to the system. Each time the program finds a new door controller, it prompts you with a door settings screen to confirm the name and door settings being assigned before adding it to the Doors database.
3. Press **Start** to begin the network scan.
4. The program polls each of the networked door controllers on the site. Each controller's network status starts with a Blue Question Mark in each door location, which indicates an UNTESTED location. As the operation continues and each door controller location is polled, the Door Status is reflected by an icon the represents one of the device types.

Network Query Process

1. Start the SofLink Plus program.
2. Select **Database | Sites**. The Sites window displays.
3. Select the site to which you wish to connect and then click the **Connect** button.
4. After the connection is made, click the **Back** button.
5. Select **Communications | Network Query** from the SofLink Plus main menu to access the Network Query option. The initial Network Query window displays.
6. Press **Start** to begin the network scan.

Field/Button Description

Current Site

Identifies the current site being tested.

Add new found doors box

Clicking this box directs that, if the program finds any new, unexpected controllers, SofLink Plus is to add these new controllers to the system.

Start

Starts the network query of the currently connected site.

Stop

Stops the current network query.

Back

Returns to the previous screen.

Found, Name, Expected

Displays the network status of the controllers.

Description of Network Query Icons

Black Checkmark

Controller with Profile Series G1 detected

Red "X"

No door controller detected

Blue Question Mark

UNTESTED door location

The software only queries the site to which you are currently connected; it attempts to query the maximum doors permitted at any site, one at a time.

7 Database

7.1 Database Menu

All data types can be accessed via the Database menu system.
Time Zones
Sites
Doors
Access Levels
Users
Holidays
Operators

7.2 Access Levels

The Access Levels option completes the access control definition of where and when a user can go within the system by associating the users card or keypad codes with one or more doors (*where*), one or more time zones (*when*), and a user type (*how*), which defines what action is to be performed when a user enters a valid code or card. Access levels defines *where* and *when* a users' users ID (card or PIN) is valid within the entire access control system.

Users can be assigned to an Access Level that has no doors assigned to it. A warning message will appear, asking if you are sure you want to do this, but the operator can choose to override the warning. This allows the operator to create an Access Level called "NONE" (for example) that has no doors assigned to it, and then simply re-assign users to that Access Level. That user is now, in effect, disabled, because he has access to no doors. Make sure you export after reassigning a user like this, this will ensure that the user has been removed from the controllers.

Access levels provide SofLink Plus system administrators a powerful tool to quickly and efficiently maintain the system users; this is especially important for large systems, with large number of users and various security requirements (zoned security approach). When a system administrator creates a new user, the system administrator allocates only an access level to the new user. This simplifies system administration as the access level automatically contains all information about which doors this user is allowed to enter and during which times. **It is not necessary to program individual users for access to each door in the system.**

NOTE: The sections in this chapter on Access Levels and the System Administrator merit special attention. Please ensure that you understand these sections before you add or edit Access Level information. To select the Access Levels option, select **Database | Access Levels**. The Access Levels screen displays. The only available "Sort" criterion for this option is name.

Adding an Access Level

1. Click the ADD button on the Access Levels screen. The Access Level Detail screen displays.
2. Enter the name for the new access level in the "Name" text box.
3. Click one of the available sites to display the available doors at the selected site.
4. Click one of the available doors at the selected site to which you wish to provide access.
5. Select an Access Condition button to specify what combination of keypad code and access card is necessary to grant access to this door.
6. Select the Type button to specify user type. User Types are explained in more detail below.
7. Click the selected checkbox of a Time Zone to indicate the Time Zones during which users assigned this access level are granted access to doors.
8. Repeat steps 3-7 for each door to which you wish to provide access.
9. Click Save to save the data to the access level database. To cancel the addition of an access level, click the Cancel button.

Field/Button Description

Name
Text box that you use to specify the name of the access level.
Site Name, Door Name, Type, Access Condition
Specifies the site name, door name, user type, and the access level required to access this site.
Selected, Time Zone Name, Start, Stop, Days
Specifies whether or not the time zone is "selected" to operate on this door for this particular Access Level.
Save
Saves current door data to Access Levels database.
Cancel
Returns to previous screen without saving data.
Deselect Door
Removes the selected door from this access level's privilege.

User Types

Standard Access
Presentation of a valid code or card by this User Type unlocks the door for the pre-determined Lock Relay Time specified in the Door Settings.

Passage
Presentation of a valid code or card by this User Type causes the following to occur: If the door is locked, it is unlocked and latched in the unlock state. If the door is unlocked, it is relocked.

NOTE: Passage users are inoperative during an active auto-unlock time zone.

Relock

This user type locks the door if the door is in an unlocked state. This function is useful when a door is unlocked by an Auto-Unlock Time Zone and you wish to relock the door before the scheduled lock time. Relock users lock a door unlocked for any reason. Relock users can't unlock a door.

Comm Unlock - Import \ Export

Presentation of a valid code or card by this User Type unlocks communications on devices that support this user type, and allows both Log imports and Data exports. This user type does not unlock the door.

Emergency

Presentation of a valid code or card by this User Type will override any lock condition and will unlock the door.

Extended Time

Presentation of a valid code or card by this User Type unlocks the door for a longer period than a standard user would unlock the door for. A good use is for physically impaired users that require more time to get to the door after their code/card has used to unlock the door. The 'Extended Unlock' timer is specified in the door settings of that individual door.

Lockout

Presentation of a valid code or card by this User Type will lockout all other users in the controller. This is useful if there has been a danger identified in a particular room and you do not want anyone to enter until the danger is cleared. The state of the lock does not change when a Lockout code is entered.

Single Use

Presentation of a valid code or card by this User Type will unlock the door as a Standard User will, but the code is accepted by that particular controller only once. A Single Use code is only exported to a device one time, to make sure that the code does not get sent again after it is used.

NOTE: If the only change you made in the software was to enable a Single Use user, and then you choose to export, you may receive a message of 'No changes since the last export', but don't be alarmed, you can be assured that the Single Use codes were actually exported as enabled. This message is just a side effect caused by the way SofLink Plus processes Single Use codes separate from the rest of the other data.

Panic

Presentation of a valid code or card by this User Type lock the controller not matter what unlock state it is in (much like the Relock user type) and it will also will lockout all other users in the controller (much like the Lockout user type). This is useful if there has been a crisis scenario identified outside of a secured area and you do not want the crisis to move into the secured area. By entering this type of user code, you will lock the door and no-on else will be allowed to unlock the door using a standard unlock code. Only the Master, Supervisor, or Emergency codes can be entered to clear the Panic locked down condition.

NOTE: The Master Code and Supervisor Code are special user types and are described in the Users section. These 2 types do not appear in the Access Level creation form and are not selectable, and are always sent to all doors that support these types. The Master Code is sent to user location 1 and the Supervisor is sent to user location 2.

Here's a chart to show the User Types supported by the device.

	Profile Series G1
Master	x
Supervisor	x
Standard	x
Passage	x
Relock	x
Com Unlock - Import \ Export	x
Emergency	x
Extended Time	x
Lockout	x
Single Use	x

Printing Access Levels

Select **Reports | Database** from the main menu and then click the **Access Level** checkbox on the subsequent screen, and specify the desired output device.
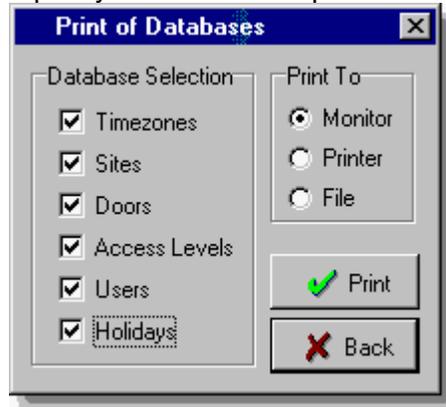
7.3   Doors

A *door* is defined as any entry point (doors with electrical or magnetic lock, turnstile, rising barrier, or motorized gate) controlled by a supported Controller. The Doors database stores detailed information about door controller setup parameters. The SofLink Plus program can export/import to all controllers in a site. To select the Doors option, select **Database | Doors**. The Doors directory screen displays. The Door directory shows all doors in all sites. You can double click any door to edit that doors options.

Adding a Door

1. Click the ADD button on the Door screen. The Door screen displays.
2. Enter the information for the door you wish to add in the Door Detail screen. Make sure you enter the door address exactly as it was programmed into the door controller for that particular door. Clicking the Time Zones tab lets you view the time zones assigned to the door you are adding. Available Time Zones are listed on the left. Clicking one of these displays the details at the bottom of the screen. Clicking or double-clicking the right arrow selects this Time Zone for this door. Up to eight (8) Time Zones can be selected for any one door. Clicking the checkbox of a selected Time Zone makes it an auto-unlock Time Zone.

3. After viewing the time zones assigned information, click SAVE or BACK as required and return to the Door Directory screen.
4. Click SAVE to save the information to the sites database.

Common Door Settings

Name

Name of the door.

Site

Identifies the site to which door is being added. A site is more or less a group of devices that share a connection type.

Address

Two-digit number that corresponds to the number programmed in the door controller. This number does not need to be filled in for or programmed into PDA connected devices such as the Profile Series G1

Door Type

Specifies the type of controller you have controlling this door.

System Options

"Options" usually have an ON/OFF value. Placing a checkmark in the box next to the options typically enables this feature. But there are some options that toggle between 2 choices.

System Parameters

"Parameters" usually have an integer value denoting a count or a timer value. But some values may reference a single value of several options.

NOTE: SofLink Plus 3 does not manage options or parameters for Stand-Alone devices. It only manages users for that device type.

Here is a chart showing what features and options are supported by each device type. The ranges are listed in seconds.

Feature	Profile Series G1
Lock Timer	1-255
Forced Door Timer	0-990
Door Ajar Timer	1-990
Log Event Mask	X
Error Lockout Count	1-50
Error Lockout Duration	1-255
Audio Alerts	X
Keypress Feedback -Audible	X
Keypress Feedback - Visual	X
Auto Unlock	X
1st In Auto Unlock	X
Auto-Entry Count	X
Daylight Savings Time Auto Adjust	X
Daylight Savings Time Date Format	X
Card AND Code Programming	X
User Lockout	X

Feature and Parameter Descriptions

Lock Timer
Amount of time in seconds that the Lock output is activated after a valid trigger occurs. Value in seconds.

Forced Door Timer
This parameter specifies the amount that the Forced Door output is activated after a forced door condition is seen. If set to 0, the output activates and remains that way until it is reset using a valid code or card. Value in seconds.

Door Ajar Timer
This parameter specifies the amount of time that the door contacts can remain open after the door has been unlocked for a valid reason before the Door Ajar output is triggered. This timer starts after the door contacts are opened. Value in seconds.

Log Event Mask
Displays a list of events that can be recorded in the transaction log buffer of the controller hardware when that type of event occurs. Deselect events you do not wish to record.

Error Lockout Count
This parameter specifies how many incorrect keypad PIN attempts are allowed before the keypad will locking up and deny access to anyone for a specified amount of time.

Error Lockout Duration
This parameter specifies how long a controller will stay in Error Lockout before coming back to normal. Value in seconds.

Audio Alerts
Parameter that let's you specify which local audio alerts are enabled.

Keypress Feedback Audible
Short audible tone generated each time a controller key is pressed.

Keypress Feedback Visual

Short LED flash generated each time a controller key is pressed.

Auto Unlock

Sets the controller to use auto-unlock time zones to automatically lock and unlock the door.

1st In Auto Unlock

Sets the controller to hold the door locked until the first person is granted access during an auto-unlock time zone.

Auto Entry Count

Auto entry means that no * is required after the keypad PIN is entered. This count specifies the number of digits that will be buffered before a PIN lookup is performed.

Daylight Savings Time Auto Adjust

This option lets the hardware auto adjust to Daylight Savings Time (dates are based on DST Date Format Option)

Daylight Savings Time Format

Selects the Date Format that DST will follow. US format will "Spring Forward" on 2:00 AM the 1st Sunday in April and "Fall Back" the last Sunday in October. Euro format will "Spring Forward" the last Sunday in March and "Fall Back" the last Sunday in October.

Card AND Code Required for Programming at the Controller

This option specifies whether both Card AND code are required to enter programming mode manually via the controller.

User Lockout

This option specifies whether the controller will allow a 'Lockout User Type' to disallow all other users access to this door. Disabled by default.

Query Door Now

This feature cannot be performed on PDA connected controllers.

A quick way to check the online status of this individual door controller. Works ' online' with hardwired sites or currently connected Modem Sites. With 'off-line' sites such as PDA connected sites, the individual 'Query Door Now feature will display the time and date of the most recent log event that you have imported, which can be useful to find out the last time this door was communicated with.

Reset Defaults

Resets the default information for all fields of this door.

Door Capacity

The tab of the door settings named "Capacity" is a feature that allows you to see the current capacity of this selected door, as well as the Access Levels that this door is currently assigned to. This can be helpful if you have reached the full capacity of a door and need to know which Access Level groups have access to this door.

For example: if you intended to add some users to the "All Access" Access Level but determined the user capacity was reached on "Front Door," you could go to the "Capacity" tab for "Front Door" and see that the Access Level named "Shift 3 Crew" has 245 users assigned to this door and you know that workers in the "Shift 3 Crew" group never use the "Front Door." You could then modify the "Shift 3 Crew" Access Level and disable access to "Front Door." This action would make 245 user slots available in "Front Door," which, in turn, would allow you to add more users to the "All Access" Access Level.

	User Capacity of Controller
Profile Series G1	2000

Time Zones

The Time Zones tab allows you to select Time Zones that are going to be assigned to this particular door. On most controllers you can select up to 8 Time Zones.

These selected Time Zones can be used for 2 reasons:
- when a user is allowed access
- when a door will be set to Auto Unlock

NOTE: When the save button is selected on the Door edit form, if no Time Zone is selected, a warning will be displayed to the operator asking if they are sure they want to save a door with no Time Zone assigned.

Auto Unlock Time Zones
1. To specify that a Time Zone is to be used for the doors auto-unlock schedule, you first add Time Zones to the Time Zone directory,
2. you then edit the door, click on the **Time Zones** tab, and select the Time Zones on the left that you want to be assigned to that door.
3. Now place a checkmark next to the Time Zone on the right to specify that want the door to unlock automatically at this time.

NOTE: If you have enabled '1st In Auto-Unlock' for this door, then every Time Zone that is setup as Auto-Unlock will function as a 1st IN Auto Unlock Time Zone. meaning that a valid user must enter during that Time Zone before the controller will allow the door to remain unlocked. 1st IN Auto Unlock is enabled by default, to create a more secure environment. If you want the doors to Auto Unlock without the need for a user to come in first, then you can simply disable the 1st IN Auto Unlock options from that doors settings

Any number of selected Time Zones can be set to Auto Unlock by placing a checkmark next to it.

7.3.1   Profile Series G1

The Profile Series G1 controllers work in conjunction with Sargent SofLink PDP Palm OS PDA software. the PDa acts as a transfer device between the PC and the controller.

Basic Characteristics: (subject to change, for a full up-to-date list of all Profile Series G1 features and specifications, contact your Access Control / Alarm Dealer)
- 2000 Users
- 16 Single Date Holidays
- 16 Block Holidays
- 8 Time Zones

- Up to 8 Auto Unlock Time Zones
- 2000 Event Transaction Log Buffer
- Invalid Code Lockout Count
- Invalid Code Lockout Duration
- Daylight Savings Time (DST) Auto Adjust
- Option to require "Card AND Code" to Enter Programming Mode
- Timed Anti-Passback
- Auto Unlock Time Zones (up to 8 per controller)
- 1st In Auto Unlock Time Zones (up to 8 per controller)
- User Types including: Passage, Emergency, Extended Unlock (for slower moving people), Lockout, Single-Use, Panic, and others
- Only new events are imported from the controller to the PDA, which reduces the log import time.
- Up to 32 controllers may be grouped together on a single site, additional Profile Series G1 networks (Sites) may be added to the software as needed

Communicating with a Profile Series G1 Door

To send user data or door settings see section Export to Doors.

To retrieve log event data see section Import Log.

7.4   Holiday

Holidays				
Name	Type	Start Date	End Date	
4th of July	Single Date	Jul, 4		
Christmas Day	Single Date	Dec, 25		
Christmas Eve	Single Date	Dec, 24		
Christmas Vacation	Block	Dec, 22	Dec, 31	
February Vacation	Block	Feb, 5	Feb, 11	
Labor Day	Single Date	Sep, 3		
New Years Day	Single Date	Jan, 1		
New Years Eve	Single Date	Dec, 31		
Summer Vacation	Block	Jun, 14	Sep, 3	
Thanksgiving Day	Single Date	Nov, 28		
Veterans Day	Single Date	Nov, 11		

Search [   ] 🔍

+ Add   📝 Edit   − Delete   ✖ Back

Sort [Name   ▼]

Holidays Option

- Holidays are used in Time Zone definitions, by specifying whether or not a Time Zone definition should apply on a holiday. A holiday is defined by specifying the month and day of the holiday, but not the year. This makes the holiday definitions year-independent, always applying to the current year. Floating holidays must be edited on a yearly basis, such as Thanksgiving, which falls on a different date (Thursday) each year. Up to (16) Single Date

holidays and (16) Block Holidays can be defined.
- All Single Date holidays that are defined are sent to controllers in the system. All Single Date and all Block Holidays that are defined are sent to every Profile Series G1 in the system.
- The Holidays database can be sorted by Name only. To select the Holidays option, select **Database | Holidays.** The Holidays screen displays.

Adding a Holiday

1. Click the ADD button on the Holidays screen. The Holiday Definition screen displays. The two fields on this screen are self-explanatory.

Holiday	Holiday
Name: 4th of July	Name: February Vacation
Type: Single Date	Type: Block
First Day: 4_ Month: Jul	First Day: 5_ Month: Feb
	Last Day: 11 Month: Feb
✔ Save ✗ Cancel	✔ Save ✗ Cancel
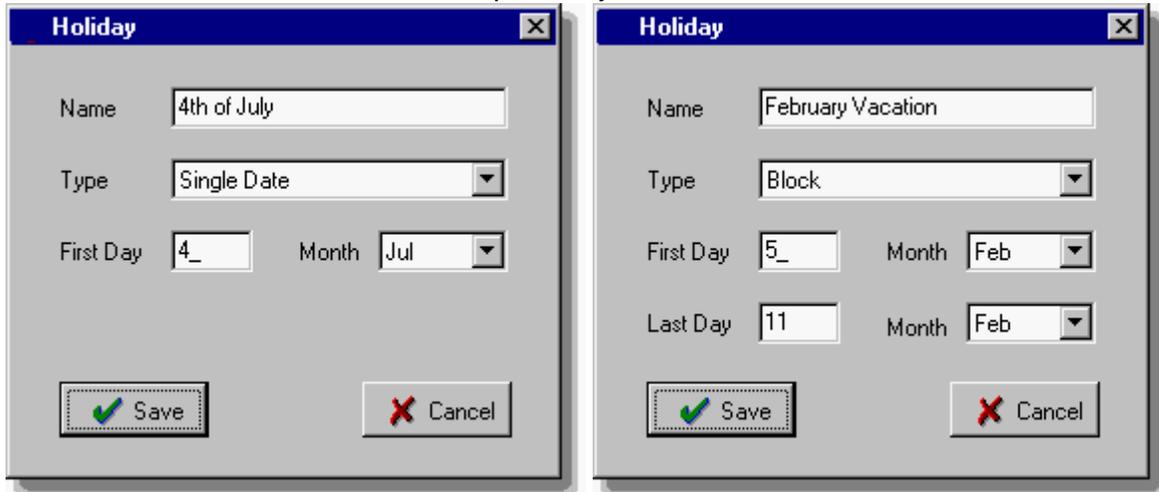
2. To define a holiday, select an undefined holiday and type in the name for it, in the "Name" field.
3. Select the desired "Type." For Single day start, enter the first day and month fields; for Block, enter both the first day and month and the last day and month. Because year information is not specified, the start date has to precede the end date in the single calendar year.
4. Click Save to save the holiday definition.

Printing Holidays

Select **Reports | Database** from the main menu and then click the **Holidays** checkbox and specify the desired output device.

Print of Databases

Database Selection
- ☐ Timezones
- ☐ Sites
- ☐ Doors
- ☐ Access Levels
- ☐ Users
- ☑ Holidays

Print To
- ⦿ Monitor
- ○ Printer
- ○ File

✔ Print

✗ Back
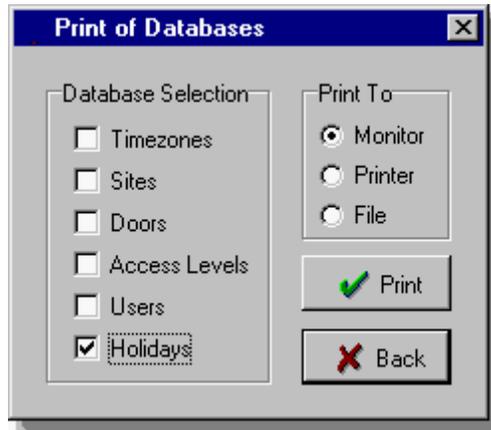
7.5   Operator

Operators Option

The Operators option lets you assign to unlimited operators the ability to create, view, and

manipulate data in the SofLink Plus databases. Detailed screens allow you to specify which activities a particular operator can perform. All operators having any type of access to SofLink Plus databases are listed. To select the Operators option, select **Database | Operators** . The Operators screen displays. The information on this screen is almost the same as described in Table 4-1. (Instead of remote site information being listed, operators information is shown.) An operator is a combination of **NAME** and **PASSWORD** that is used to login to SofLink Plus .

Adding an Operator

1. Click the **ADD** button on the Operators screen.

Access	Feature Description
	Login - Enables to use HUBMANager
	Logout - Hubmanager remains active, but nobody can use menu until next login
Enabled	Change Password - Enables to change password of logged operator
	Exit - Closes HUBMANager immediately
Full	Timezones - manages timezones table
Full	Sites - manages Sites table
Full	Doors - manages Doors table
Full	Access Levels - manages users' rights to access doors

*Operator dialog: Name HUBMAN, Password ******, Validation ******. Buttons: Save, Cancel, Toggle, Enable all, Disable all.*

2. Enter the information in the operator detail fields as required.
3. Click **Save** to save the operator data to the operator database.

Field/Button Description

Name

Specifies the name of the operator.

Password

Specifies the password for this operator.

Validation

Text box used to re-enter the password for this operator.

Access

Lists the authorization required, if any, for all parts and databases of the SofLink Plus program.
Full: operators with this authorization can view records, add new records, and modify or delete existing records.
None: operator with this authorization cannot modify records, or view data or records.
Read only: operators with this authorization can view records, but cannot add new records, or modify or delete existing records.

Toggle

Cycles through the available options for a particular feature. Or you can double-click the feature to cycle.

Enable All

Enables all authorizations. Toggles between Full and None.

Disable All

Disables all authorizations. Toggles between Full and None.

Save

Saves the current operator data to the operator database.

Back

Returns you to the previous screen.

7.6 Sites

Sites

A *site* is a part of the access control system (group of controllers) connected via the same "Connection Type".

The following table shows which connection types are supported by which controllers.

	PDA
Profile Series G1	x

All sites are created within the SofLink Plus program. Sites must be defined with unique names. You may create as many Sites of a certain connection type as you like.

Adding a Site

1. Click the **ADD** button on the Sites screen. The Sites screen displays.
2. Enter the name.
3. Select the Device Group that contains the controller type to be used in this site. Only one "Device Group" may be chosen.
4. Select the "Connection Type" that is going to be used to connect to this Site.
5. Click **Save** to save the information to the database.

Field/Button Description

Search Text box

Into which you enter name of specific site record you wish to find in the site database.

Binoculars

Button that initiates the record search, based on the "Search" text.

Sort

Lets you specify the sort criterion to use for this database; available options are in the drop-down list (name, group, type, phone number, port).

Connection progress

Shows the connection progress for this site; system generated during modem dial up.

Name

Shows the name of the site.

Phone

Shows the phone number of the site (if applicable to the connection type)

Port

Shows the communication port used by the site (if applicable to the connection type)

Add

Button that initiates the ADD a site function.

Edit

Button that initiates the EDIT a site function.

Delete

Button that initiates the DELETE a site function.

Connect/Disconnect

Button that initiates the dialing of the highlighted remote site. This changes to Disconnect after a successful connection.

Device Group

Allows selection of the controller type that will be used on this Site

Connection Type

Allows selection of the method of communication to this site.

Back

Displays the previous screen.

7.6.1 PDA Connection

A PDA connected site is defined if you are using your PDA as a transport device between SofLink Plus and your Profile Series G1 controllers. The are no settings to define for this Site type.

7.7 TimeZones

Time Zones are used for two purposes:
(1) to specify the days and times when card and keypad codes grant access, and
(2) to specify door auto-unlock schedules. The auto-unlock settings are established in the door settings.

Time Zone is defined by its beginning and end times and days of the week when this Time Zone is valid. SofLink Plus also lets you specify whether holidays defined in the Holiday Database should be included in the particular Time-zone. Enabling Holidays means that this Time Zone is provided access on defined holidays. To select the Time Zones option, select **Database|Time Zones**. The Time Zones screen displays.

The "Sort" field lists the only sort criterion for this option. In this case, the only way time zones can be sorted is by name.

Defining Time Zones

You can define unlimited Time Zones. Each door can select up to eight (8) Time Zones from that defined list. A Time Zone consists of a start time, a stop time, the Time Zone Type, and the days of the week during which the Time Zone is in effect. Here is an example Time Zone definition:

Start Time	Stop Time	Type	Days of the Week
07:00 AM	06:00 PM	Single Day	Mon, Tue, Wed, Thu, Fri

Note that AM/PM is used in defining a Time Zone. The example Time Zone above starts at 7:00 AM and ends at 6:00 PM. It is in effect Monday through Friday, not including holidays. When defining Time Zones, ensure that Door 1 is selected in the Door Settings tab. Also, only eight time-zones are operable on a single piece of hardware. The example Time Zone above starts at 7:00 AM and ends at 6:00 PM. It is in effect Monday through Friday, not including holidays.

Single Day Time Zones can not cross the midnight time line (12:00 AM); they define only start and stop times within one day. Example: 7:00 PM - 8:00 AM, two Time Zones are needed—(TZ1) 7:00 PM - 11:59 PM, and (TZ2) 12:00 AM - 8:00 AM.

Midnight Crossing Time Zones (available on Profile Series G1 controllers only) can cross the midnight time line (12:00 AM); they define only start and stop times within a 24 hour period. Example: 7:00 PM - 8:00 AM (crossing midnight).

Defining Holiday Time Zones

When you define a Time Zone, you can specify whether or not it is to be in effect on holidays by using the "Hol" checkbox. The Door Setup Holidays List is used to specify the dates that are to be considered holidays by the system. Placing a checkmark next to "Holidays" directs the program to grant access on defined holidays.

Printing Time Zone Definitions

To print the Time Zone definitions, select **Reports| Database** from the main menu and then check the **Time Zones** box in the Printing of Databases screen. Chapter 7 describes Reports in details.

Single-Day Time Zone
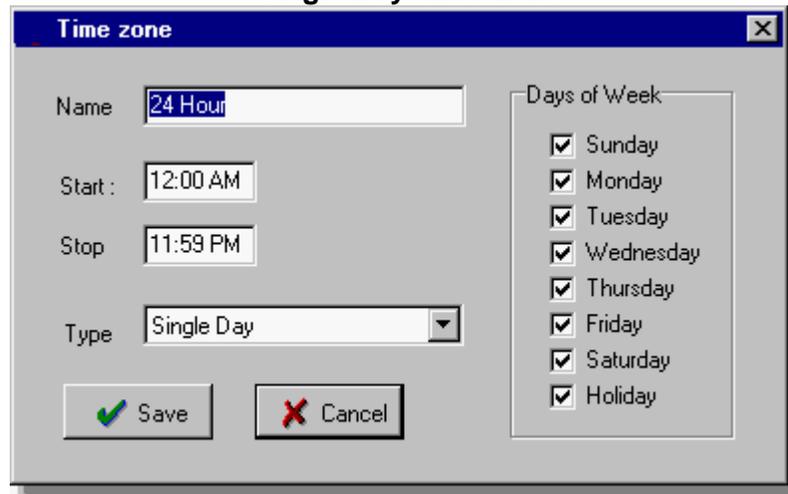
Midnight-Crossing Time Zone
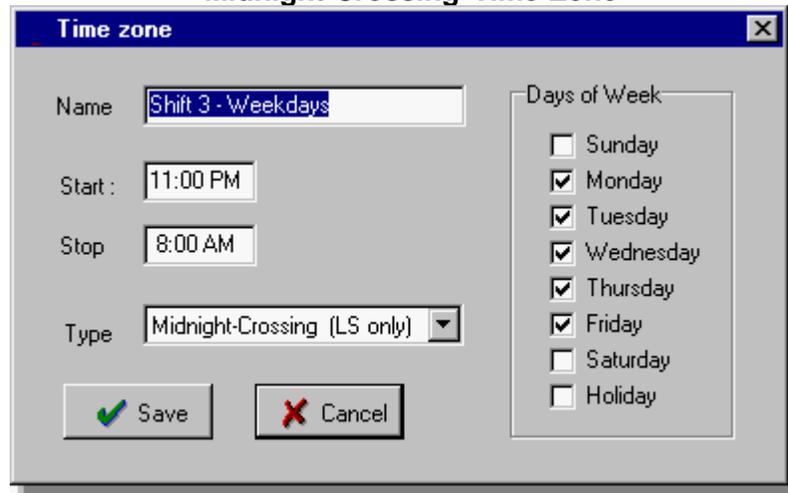
Adding a Time Zone

1. Click the **ADD** button on the Time Zone screen. The Add a Time Zone screen displays.
2. Enter the name of this new time zone in the Name field (maximum 18 characters), the

beginning and ending times in the corresponding fields (use AM/PM time format), select the Time Zone Type, check the days of the week to which this time zone should apply (on the right side), and click **SAVE** to save the information to the time zone database.

Editing a Time Zone

Editing an existing time zone is very similar to adding a new one.

1. Highlight the time zone you wish to edit, and click the **EDIT** button on the Time Zone screen. The specified Time Zone screen displays.
2. Modify the information as required.

Deleting a Time Zone

Deleting an existing time zone is easy.

1. Highlight the time zone you wish to delete, and click the **DELETE** button on the Time Zone screen. The software displays a delete confirmation prompt. Only Time Zones not assigned to an Access Level can be deleted.
2. Click **OK** or **CANCEL** as desired.

Searching for a Time Zone

You can search the time zone database for a particular time zone record. Enter the time zone's name in the "Search" text box on the Time Zone screen and click the **Binocular** button or press the **<Enter>** key.

7.8 Users

The Users option lets you add new users to the system and specify various card and code parameters for each user. You can also edit existing user records, delete them, search for particular user records, and print all user records in the user database. To select the Users option, select **Database | Users**. The Users screen displays. User information is shown and an "Add Group" button is added to facilitate the entry of groups of users. Available sort criteria are listed in the "Sort" drop-down list [User (the default) Name, Last Name, Access Level].

The User List Import Wizard option lets you create users and import the user names from an external list in a simple step-by-step procedure.

First Name	Last Name	Card	PIN	RF Fob	Raw Data	Visual ID	Access Level
Jim	Smith	4321	39773		*****621C3	ENG-3406	ALL ACCESS
Lockdown	Panic			357-1	*****00DF3	LOCK1	ALL ACCESS
Master	User		1234				
Supervisor	User	5276	144651		*****22938		

Sort [First Name ▼]   Search [   ] [🔍]

[➕ Add] [➕➕ Add Group] [📖 Edit] [➖ Delete] [✖ Back] [🪄 User List Import Wizard]

Adding a User
1. Click the **ADD** button on the Users screen. The User edit screen displays.
2. Enter the information as required.
3. Click **Save** to save the card data to the card database. To cancel the addition of a card holder, click the Back button

Field/Button Description
First Name
Specifies the first name of the user. (30 character max)

Last Name
Specifies the last name of the user. (30 character max)

Access Level
Specifies the access level for this user.

Member of Time Management Group
Enabling this option will cause this user to be included in the Time Management report.

Card \ RF Fob data will be assigned (checkbox)
Enabling this option will display the options related to Card data entry. Disabling this option will clear all data and hide all the options.

PIN data will be assigned (checkbox)
Enabling this option will display the options related to PIN data. Disabling this option will clear all data and hide all the options.

Save
Saves the current user data to the user database.

Back
Returns you to the previous screen.

Card Format

NOTE: When adding new users, you may notice the card format and supporting data fields may be pre-filled with default data. This default data may come from either that formats definition or from the operator defining this data to be used as the default data for new users. Whenever a user is created and saved, the program will compare the currently selected card format to the currently saved default card format. If the 2 formats and supporting data (for example: site code) are not exactly the same, then the program will ask the operator if they would like to set this format and supporting fields as the default format for new users. This can be a time saver in the future, because once the desired card format is set as the default, it will automatically be selected, so you will not need to needlessly make the card format selection in the future when adding new users, or editing existing users.

Card Format
Here you must specify what type of 'card' criteria you will be assigning to this user. The term 'card' is used to represent any type of data entered into this field for this user. It can be data of a known HID proximity card format, or the data for an RF Fob (radio frequency fob) supplied by Sargent. Not all card formats explained in this manual are available in all systems. It will be dependant based upon the capabilities of the controller hardware. Not all formats are available on all controllers.

If you do not know the format, card number or site codes of your HID cards, you can purchase a separate piece of equipment called an 'Enrollment Station'. The Enrollment Station connects to the serial port of your PC, and allows you to import HID proximity cards directly into the software by simply presenting the card to the Enrollment Station.

If you have an HID proximity card format that is not shown in the list of your software, it is possible to have a custom card format add-on file created by Profile Series G1 and sent to you. After you install this add-on file on the PC running SofLink Plus, you will then have the option of selecting this new format from the 'card format' list.

At the time of printing, these are the currently supported card formats:
Sargent 26 Bit
Sargent 1000
Custom Sargent 1000
Standard 26 Bit
Standard 34 Bit
Corporate 1000
RF-Fob (requires the RF Fob option on the controller)
Enrollment Station

Visual ID (not required)

A text field (50 characters max.) that will allow you to enter the visual identifier of the 'card' you are assigning to this user. This is helpful if the card has printing on it that is not necessarily information related to the data encoded on the card. It can be used as a way to identify the owner of a lost card, if found.

HID Proximity Card

Card Number

This field will be visible if a card format is selected that requires a cards 'PIN' to be defined, such as all HID proximity card formats. The length and range of a card PIN will vary based on the particular format selected

Site Code

This field will be visible if the card format selected requires the operator to define the Site Code of the proximity card.

Group Code

This field will be visible if the card format selected requires the operator to define the Group Code of the proximity card.

Corp. Code

This field will be visible if the card format selected requires the operator to define the Corporate Code of the proximity card.

NOTE: If you know that the Site, Group or Corporate Codes are part of the data format you have selected and these fields are not visible, then this format may also specify that any or all of these fields are predefined, unchangeable and should not be displayed (potentially for security reasons).

RF Fob (Radio Frequency Fob)

An RF Fob is a device much like the alarm control you have on your keychain for your car alarm. When a button on the fob is depressed, radio frequency data is generated by the fob. The data is comprised of both the RF Fob Number and the RF Fob button number itself. If the RF Fob data that is heard matches a valid user in the controller, then the controller will react based upon the user type that is assigned to this user via <u>Access Levels</u>. Any user type can be assigned to an RF Fob.

Some RF Fobs can have up to 8 buttons. Each button will be 'heard' differently by the controller than any other button on the fob, although the Fob Number itself remains the same. Each button of the RF Fob could have a different function, but each button would be need to be assigned to a different user.

For example: If you wanted fob button 1 to unlock the door and fob button 2 to set the door in passage mode, you would create a user in the system
First Name   Jim
Last Name   Smith - Button 1 Unlock
Access Level   (any access level that supports unlocking the desired door)
Fob Number   100
Fob Button   1

and another user,
First Name   Jim
Last Name   Smith - Button 2 Passage
Access Level   (any access level that supports setting the desired door in Passage mode)

Fob Number   100
Fob Button   2

Not all controllers support RF Fobs. Please check your hardware vendor for availability.

Fob Number
This field will be visible and required if the selected format is 'RF Fob'. The number you enter into this field corresponds to the number assigned to the RF Fob itself.

Fob Button
This field will be visible and required if the selected format is 'RF Fob'. This field corresponds to the actual button on the RF Fob that will be depressed.

The RF Fob number displayed in the user directory is comprised of both the RF Fob number and the fob button number separated by a '-'.

Enrollment Station
The enrollment station is a piece of hardware that connects to a serial port (or USB port via a USB to Serial adapter) of the PC and allows you to read the raw 40 bit data stream from an HID proximity card and store this raw data. This is helpful if you do not know the exact format of the HID proximity cards you are enrolling, because with this Enrollment option, you don't have to. The raw data received by the Enrollment Station in the same data the controller receives and looks up in memory when the controller reads the same HID proximity card.

The steps are simple:
1. Select Enrollment Station as the Card Format.
2. Specify the Com Port the Enrollment Station is connected to (if it was not previously defined)
3. Select the 'Get Card From Enrollment Station' button.
4.   Present the card to the enrollment station
5.   The card will be read, and raw data will be imported and displayed. You will notice that the first few digits of the raw data is masked with asterisks (*). This is done as a security precaution.

Enrollment successful. This user can now be saved.

Raw Data
Raw data is the actual data that is stored in the controller. This raw data has no particular format. It can be comprised of HID proximity card data, RF Fob Data, enrollment station data or some other

type of input device, but none of the parameters of those formats are specified in the raw data. It is up to the controller to capture the data that it received and see if a match can be found. Since the controller does not know the origin of the card data, it is able to store card data for any 40 bit (or less) HID card format. Because the controller does not 'know' the format of the data it has no way to perform Site Code, Group Code, Corporate Code verification.

You will notice that the first few digits of the raw data is masked with asterisks (*). This is done as a security precaution.

PIN Data (a.k.a. Keypad Code data)

PIN
Specifies the keypad PIN code for this user. Clicking the Random button generates the code.

Random PIN Length
Specifies the length of the random PIN number, when you click the Random button. This can be between 4 and 6 digits.

Member of Time Management Group
Lets you assign Time Management status to this user, meaning that this user will be included in the Time Management Report. Time Management is an entry level Time + Attendance report. For more information see Time Management.

NOTE: The Time Management Report requires that both 'User IN' and 'User OUT' events must be generated for the report to calculate how long the user was 'IN' the building. Not all controllers generate 'User OUT' events, especially self contained locks.

Printing User Records
Select **Reports | Database** from the main menu and then click the **Users** checkbox and specify the desired output device.

Master Code
- The User List contains, as its first user on the list, the Master Code. This user has a special function. Its access code is equivalent to the Master Code in a controller. The factory-default access code for this user is "1234." This code is sent to every controller in the system and is placed into user location 1.
- This user is not assigned to an Access Level, because it is not possible to edit which doors this code will go to.
- Any time a new controller (door) is added to the system, it will automatically receive the "Master Code" when data is exported to this controller.

Supervisor Code

- The User List contains, as its second user on the list, the Supervisor Code. This user has a special function. Its access code is equivalent to the Supervisor Code in a controller. The default access code for this user is empty. If you define this code in SofLink Plus, then this code will be sent to every controller in the system that supports this user type, and this code is placed into user location 2 of the controller.
- This user is not assigned to an Access Level, because it is not possible to edit which doors this code will go to.
- Any time a new controller (door) is added to the system and it supports this user type, it will automatically receive the "Supervisor Code" when data is exported to this controller.
- Other user types are described in the Access Level section.

Disabling a User

You may find that you have a user going on an extended vacation or leave of absence and you want to temporarily disable this user so that their criteria can't be used to gain access. The easiest way to do this is to create an Access Level called "NO ACCESS" that has access to no doors in the system. Now you can simply users you want to disable to this particular Access Level. And when the user starts work again, you can simply change the Access Level for that user to the original Access Level.

If you find that you also want to see events that record that this particular user was trying to gain access when they should have been on vacation, you can simply create an access level that mirrors that access level this user was originally assigned to, but you will not assign any Time Zones to the doors. Now when this user attempts to access the building, an event will be generated and stored in the controller that says 'Access Denied - Bad Time Zone'.

7.8.1   Add User Group

This feature allows you to add a batch of users with common traits and/or sequential card numbers.

1. Click the **ADD GROUP** button on the Users screen. The Add Users Group screen displays.
2. Enter the information in the add group fields as required.
3. Click **Add** to save the user data to the user database. To cancel the addition of a card group, click the **Cancel** button.

Field/Button Description

First Name

Specifies the first name of the user. (30 character max)

Last Name

Specifies the last name of the user. (30 character max)

Access Level

Specifies the access level for this user.

Generate Sequential Card (checkbox)

Enabling this option will display the options related to generating sequential Card data. Disabling this option will clear all data and hide all the options.

Generate Random PIN (checkbox)

Enabling this option will display the options related to generating random PIN data. Disabling this option will clear all data and hide all the options.

Add

Generates the data and saves the users to the user database.

Cancel

No users are added. Returns you to the user directory.

Card Format

Here you must specify what type of 'card' criteria you will be assigning to this user. The term 'card' is used to represent any type of data entered into this field for this user. It can be data of a known HID proximity card format, or the data for an RF Fob (radio frequency fob) supplied by Sargent. Not all card formats explained in this manual are available in all systems. It will be dependant based upon the capabilities of the controller hardware. Not all formats are available on all controllers.

Standard 26 Bit
Corporate 1000
RF-Fob
Enrollment Station

If you have an HID proximity card format that is not shown in the list of your software, it is possible to have a custom card format add-on file created by the software vendor and sent to you. After you install this add-on file on the PC running SofLink Plus, you will then have the option of selecting this new format from the 'card format' list.

HID Proximity Card

Card Number

This field will be visible if a card format is selected that requires a cards 'PIN' to be defined, such as all HID proximity card formats. The length and range of a card PIN will vary based on the particular format selected

Site Code

This field will be visible if the card format selected requires the operator to define the Site Code of the proximity card.

Group Code

This field will be visible if the card format selected requires the operator to define the Group Code of the proximity card.

Corp. Code

This field will be visible if the card format selected requires the operator to define the Corporate Code of the proximity card.

NOTE: If you know that the Site, Group or Corporate Codes are part of the data format you have selected and these fields are not visible, then this format may also specify that any or all of these fields are predefined, unchangeable and should not be displayed (potentially for security reasons).

RF Fob (Radio Frequency Fob)

An RF Fob is a device much like the alarm control you have on your keychain for your car alarm. When a button on the fob is depressed, radio frequency data is generated by the fob. The data is comprised of both the RF Fob Number and the RF Fob button number itself. If the RF Fob data that is heard matches a valid user in the controller, then the controller will react based upon the user type that is assigned to this user via Access Levels. Any user type can be assigned to an RF Fob.

Some RF Fobs can have up to 8 buttons. Each button will be 'heard' differently by the controller than any other button on the fob, although the Fob Number itself remains the same. Each button of the RF Fob could have a different function, but each button would be need to be assigned to a different user.

For example: If you wanted fob button 1 to unlock the door and fob button 2 to set the door in passage mode, you would create a user in the system
First Name　　　Jim
Last Name　　　Smith - Button 1 Unlock
Access Level　　(any access level that supports unlocking the desired door)
Fob Number　　　100
Fob Button　　　1

and another user,
First Name　　　Jim
Last Name　　　Smith - Button 2 Passage
Access Level　　(any access level that supports setting the desired door in Passage mode)
Fob Number　　　100
Fob Button　　　2

Not all controllers support RF Fobs. Please check your hardware vendor for availability.

Fob Number
This field will be visible and required if the selected format is 'RF Fob'. The number you enter into this field corresponds to the number assigned to the RF Fob itself.

Fob Button
This field will be visible and required if the selected format is 'RF Fob'. This field corresponds to the actual button on the RF Fob that will be depressed.

The RF Fob number displayed in the user directory is comprised of both the RF Fob number and the fob button number separated by a '-'.

Enrollment Station
The enrollment station option is not available for adding user groups. That option can only be used for adding or editing a single user.

PIN Data (a.k.a. Keypad Code data)
Random PIN Length
Specifies the length of the random PIN number, when auto generated. This can be between 4 and 6 digits.

Member of Time Management Group
Lets you assign Time Management status to this user, meaning that this user will be included in the Time Management Report. Time Management is an entry level Time + Attendance report. For more information see Time Management.

NOTE: The Time Management Report requires that both 'User IN' and 'User OUT' events must be generated for the report to calculate how long the user was 'IN' the building. Not all controllers generate 'User OUT' events, especially self contained locks.

Field/Button Description
Number of Users to Add
Specifies the number of users being added
First Sequential Card Number
Specifies the card number for the first sequential card being added for this group

Site Code

This field lets you define the Site code of the 26 bit HID prox cards you are using. You are required to know the exact site code of these cards you are adding if you are using Profile Series G1 in your access control system, because the site code of the prox card is used to gain access on these device types.

PIN Length

Specifies the length of the random PIN number

Generate Code

Directs the program to generate the random code

Generate Card

Directs the program to generate the card numbers sequentially, starting with the number in the "First Card Number" field.

Member of Time Management Group

Lets you assign Time & Management status to this user.

Access Level

Specifies the access level for these users.

7.9   User List Import Wizard

The User List Import Wizard is a lot like the Add User Group function but with the added capability to import names from a CSV file. This is useful if you have an existing list of names located in another system such as a Human Resources personnel file, and you wish to save time when adding a large group of users without having to type the names of each user that is added to the SofLink Plus database.

If the names you have are in some other database system, review the documentation or help file of that program for information referring to 'Exporting Data to a CSV file'.

The wizard will allow you to import up to 9,999 names from a CSV file.

Required CSV File Format

- The CSV name file that you are importing must be in the following format:
  - Field 1: First Name
  - Field 2: Last Name
- The CSV file shouldn't have a header row.
- The CSV file shouldn't have any carriage returns.
- The CSV file shouldn't have any blank fields.
- Each field shouldn't be more than 30 characters long. If any field is more than 30 characters, that field will be truncated to the first 30 characters.
- No field should contain apostrophes. Any apostrophes will be removed.
- Here is a sample of the required CSV file format:
  - John, Smith
  - Jim, Jones

Recommended Preparation of the SofLink Plus database before CSV File Import

Although it is possible to import a name list of up to 9,999 and create these users without assigning them to an Access Level, it is highly recommended that you assign an Access Level to each of the users you are adding. This will save you time later.

If you are importing 1000's of names and do not assign an access level, you will have to edit each of these users individually afterwards, requiring 1000's of keystrokes. But this may be the option you want if you prefer to bring in the entire list and then assign the Access Level to the users as you see fit.

The wizard will warn you to not create users without an Access Level assigned.

If you do not know for sure where each and every user will be granted access, you can always create an empty Access Level that has access to no doors assigned initially. You can then add the group of people that will most likely have the exact same access privileges, and modify the Access Levels privileges afterwards.

Try not to add groups of users larger than 1998 in this manner (1998 users + 1 Master Code + 1 Supervisor Code).

Step 1 - Open CSV File

Step 1 of the wizard prompts you to specify the CSV file where the names are located.

1. Click the **Open CSV File** button and browse to where you had stored the CSV file containing the user names. If the list is Imported successfully you will receive a message 'File Read OK'.
2. Click **Next** to continue.

The import function will check for and announce to you any duplicate first and last name combinations within the CSV file as they are being imported.

Step 2 - Add Users

Step 2 is where the users are actually added to the database

You may select: a block of names, individual names one at a time, or all names in the list. You may use any combination of these selection tools, but once a name is selected, you can only deselect it by clicking the checkbox next to the name, or by clicking the 'Uncheck All' button and starting again.

Editing User Names

You can double-click a user name to edit the First name or Last name text.

Selecting a Block of Names by Clicking in the List

To select a block of names using the list, first click the name at the top of the block to be selected, then hold down Shift and click the bottom name of the block. This will select all names in between the top and bottom names you selected.

Selecting a Block of Names by Specifying the Number of Names to Select

To select a specified number of names, first select the starting user in the list.

Then enter the number of names you want to select in the edit box labeled 'Select X Users' (where x is the number you want to select).

Now click the button labeled 'Select X Users'.

The Wizard will now select the specified number of users starting at the top of the list.

This is useful if you have imported 1000 names and you only want to select the first 300 names,

or some subset of names in the middle of the list.

Selecting a Block of Names by Selecting the Individual Names
If you only have a small number of names to select, you can simply select the individual names from the list.

Assigning Card Data
During the add sequence you may either: auto generate and assign sequential card numbers or not assign card data at all.

Assigning Code PIN Data
During the add sequence you may either: auto generate and assign random 4, 5, or 6 digit PIN numbers or not assign PIN data at all.

Card Formats
See Users for an explanation of the different card formats and card format options available.

Assigning Access Levels
Choose the Access Level you want to add the users to. You can also choose to not assigned the users to an Access Level at this time.

NOTE: If you choose to not assign users to an Access Level, you will need to edit each user individually afterwards.

Adding Users
After you have specified the Card Format, Card data, PIN data, and the Access Level to be assigned to the selected users, you can now click the **Add** button to start adding these users to the system.

Before attempting to add any users, the wizard will analyze the selected Access Level to make sure you are not trying to exceed the capacity of any door assigned to that Access Level. For example: if you have an Access Level named "All Doors" that has access to a controller with a capacity of 2000 users and 1800 users are already assigned to this controller and you attempt to add 700 more users, you will get a warning that the capacity of this door has been exceeded by a certain number of users, in this case 500.

Cancel the addition, and go back and edit the list to remove those 500 people that do not need access to this particular. You will have to decide which of these 700 users have the greatest priority on getting access to this door. If you require that ALL of the 700 people have access, you may be able to upgrade to a door controller that has a higher user capacity if one is available or you may have to exit the Wizard and go back into the main program and go to that door and select the 'Capacity' tab and see the breakdown of how users are assigned to this door, and make so changes.

Refer to the Doors section for details.

8   Tools

8.1   Tools Menu

Select **Tools** from the SofLink Plus main menu. The Tools drop-down menu displays.
Log Archiving
Audit Archiving
Database Backup/Restore
Run Com Port Test
External Tools
Scheduled Log Import
Table Initialization
Indexing
Application Initialization

8.2   Audit Archiving

The Audit Archiving option permits you to archive (move) the SofLink Plus Audit file from the default directory to a directory and filename you specify; the archive file is stored in .CSV format. An Audit file records which actions the operator performed using the SofLink Plus software.

1.   Select **Tools | Audit Archiving** from the SofLink Plus main menu to access the Audit Archiving option. The Audit Archive screen displays.
2.   Decide if you wish to change the default folder or file name for the audit archive. The default folder is "Archive" and the default file name is "Audit" followed by today's date. If so, click the **Change** button. An Open Folder Navigation screen displays, initially showing the default directory to which the audit archive is to be archived.
3.   Highlight the desired audit archive file you wish to archive; next, if the default directory or file name is not correct, navigate to the desired directory using standard Windows techniques, and/or change the file name, and then click the **Open** button. You return to the Audit Log Archive screen.
4.   Click the **Archive Now** button. A message displays informing you of the status of the archive. Audit archives can be opened for viewing using the **Tools | Archive Viewer** option.
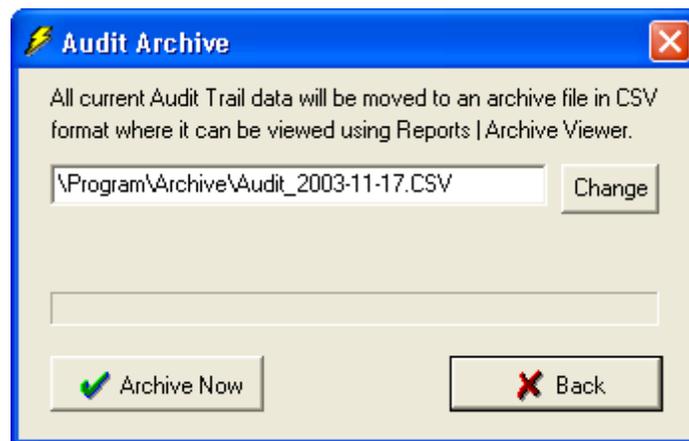
8.3   Log Archiving

The Log Archiving option moves the transaction log from the working directory to the default archive directory. You should run this when you no longer need to filter the data stored in the current log database, or if you wish to move it to a .CSV file.

1. Select **Tools | Log Archiving** from the SofLink Plus main menu to access the Log Archiving option. The Log Archive screen displays.

2. Decide if you wish to change the default folder or file name for the log archive. The default folder is "Archive and the default file name is "Log" followed by today's date. If so, click the **Change** button. An Open Folder Navigation screen displays, initially showing the default directory to which the log archive is to be backed up.

3. Highlight the desired log archive file you wish to archive; next, if the default directory or file name is not correct, navigate to the desired directory using standard Windows techniques, and/or change the file name, and then click the **Open** button. You return to the Log Archive screen.

4. Click the **Archive Now** button.
A message displays informing you of the status of the archive.

Log Archives can be opened later using the **Reports | Archive Viewer** option, but once a Log is archived it can no longer be filtered in SofLink Plus.
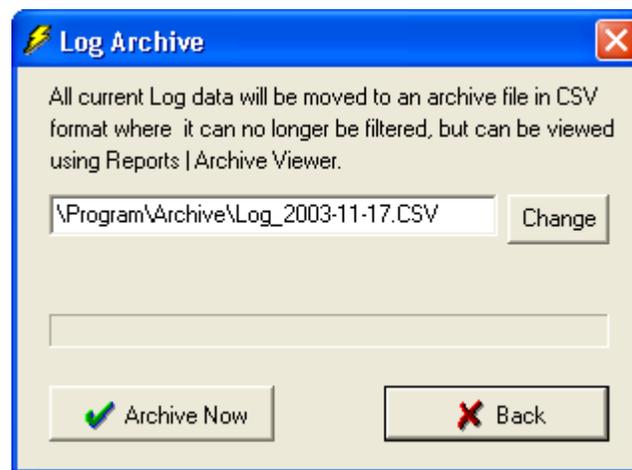
8.4   Database Backup/Restore

The Database Backup/Restore option permits you to backup (copy) the SofLink Plus databases from the default database directory to the \backup directory. The Restore button in this option, in contrast, lets you restore the backed up SofLink Plus databases from the \backup directory to the default database directory, which overwrites (and deletes) the current SofLink Plus databases.

NOTE: Backups cannot be created directly on a floppy disk, but can be copied to a floppy disk after the backup is created on the hard drive.

1. Select **Tools | Database Backup/Restore** from the SofLink Plus main menu to access the Database Backup/Restore option. The Database/Restore screen displays.

2. Click the **Backup** button to begin the backup. Alternatively, click the **Restore** button to begin the restore. The program displays messages to keep you informed of the status of the backup or restore.

NOTE: If you attempt to restore a database backup created from a database prior to SofLink Plus 3, or from any other incompatible source, the program will instruct you to perform the data conversion (check with your software vendor for data conversion utility availability).
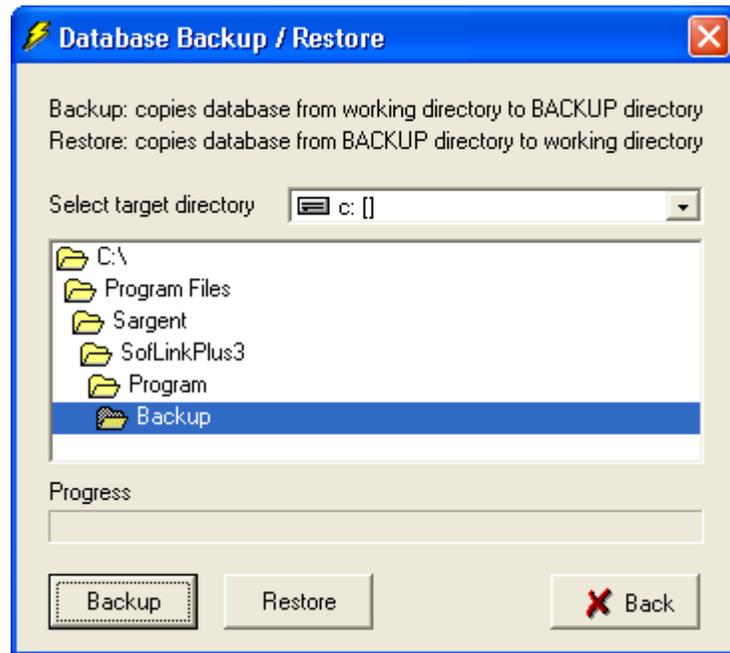
8.5 Run Com Port Test

NOTE: If your controller does not support a serial connection, then running the Com Port Test will not be necessary, and the software kit you received may not contain the 'Loopback' connector that is required to perform the Com Port Test.

About the Com Port Test Program

The Run Com Port Test option, once selected, runs a Com Port test utility program. This program tests the availability of your computer's Serial Com ports 1 - 4, and also determines if these ports are currently in use by any other programs. There are two parts to this procedure (testing without the loopback connector and testing with it), and both parts must be performed.

You can run it as necessary from the Tools menu, and can specify a different directory in which to store the Com test program using the Tools | External Tools option.

The name and path of the program that is run when the Run Com Port Test item is selected from the Tools menu can be modified using the **Tools | External Tools** form. See External Tools

Running the Com Port Test

1. Start the COM Test program in one of two ways: (a) by clicking Finish on the Setup Complete screen at the end of the Install program, or (b) from the SofLink Plus Main Menu,

Tools | Run Com Port Test. The "Launching Com Port Test" message displays followed by the Initial COM Port Test screen.

2. To start the first part of the Com test, disconnect any devices from the Com Port on your computer that you want to test communications on

3. Select Start Test.

4. This message then displays: Please make sure the loopback connector is NOT installed and click OK to continue testing.

5. Ensure that the supplied Loopback connector is not connected to any of the Com ports on your computer. Then click OK. The program conducts the first part of the Com test by looking for all available Com ports. A message then displays, indicating part one is over.

6. Please connect the loopback connector to your computer's COM port that you are testing. One side of the Loopback connector has a female DB9-pin connector, the other side a DB25-pin connector; connect using the appropriate side.

7. Click OK to begin the second part of the Com Port test. If part two of the Com test is successful, this or a similar message displays overlayed on the Test Results screen. "The test connector has been found at COM Port: x. Please record this information".

3. If the test is not successful, there can be several problems: no Com ports are available, available Com ports are currently in use by other devices or programs, or available Com ports are not working correctly. Contact your computer administrator as you may need to add another Com port.

4. Record the Com port information safely as instructed and then press OK.

5. Review the information on the Com Port Test Results screen as necessary and then click Close.

8.6   External Tools

The External Tools option permits you to specify the directory and file to use for the Com Port Test program, in the case where you want to use a different Com Port Test Program. The path to the com port test supplied with SofLink Plus is already defined.
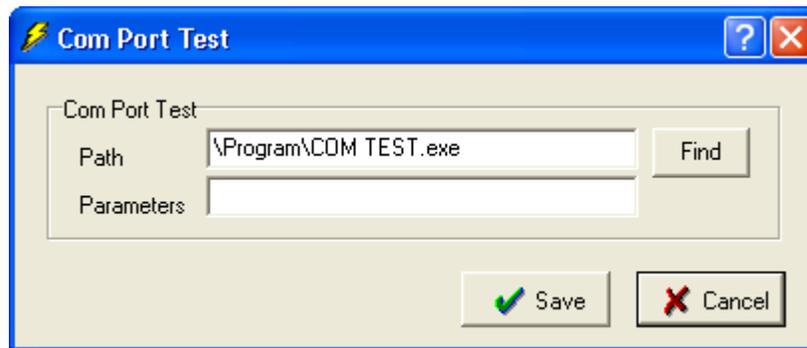
1. Select **Tools | External Tools** from the SofLink Plus main menu to access the External Tools program settings. The External Tools screen displays, showing the default path and parameters.

2. Enter the desired path and parameters, if the defaults are not correct and click the **Save** button.

To navigate to a different path, click the **Find** button and then use standard Windows navigation techniques to specify the desired path on the Open screen (not shown). The Com Port Test program is located in the SofLink Plus 3 folder in the \program folder at the following path: C:\Program Files\Sargent \SofLinkPlus3\Program\COM TEST.exe

These settings do not normally need to be changed.

See also: Run Com Port Test

8.7 Scheduled Log Import

The Scheduled Log Import option lets you specify the time, period, and start time parameters for automatic downloading of the log file, from all doors in all sites. The program saves this information so that the downloading always takes place when and how you specify until you change the parameters. You must log out from but not exit the SofLink Plus program for the automatic importing of transaction logs to occur. If an operator is still logged in when the scheduled import begins, a prompt displays asking if the import should begin now.

1. Select **Tools | Scheduled Log Import** from the SofLink Plus main menu to access the Scheduled Log Import program. The Scheduled Log Import screen displays.
2. Enter the desired parameters and click the **OK** button.
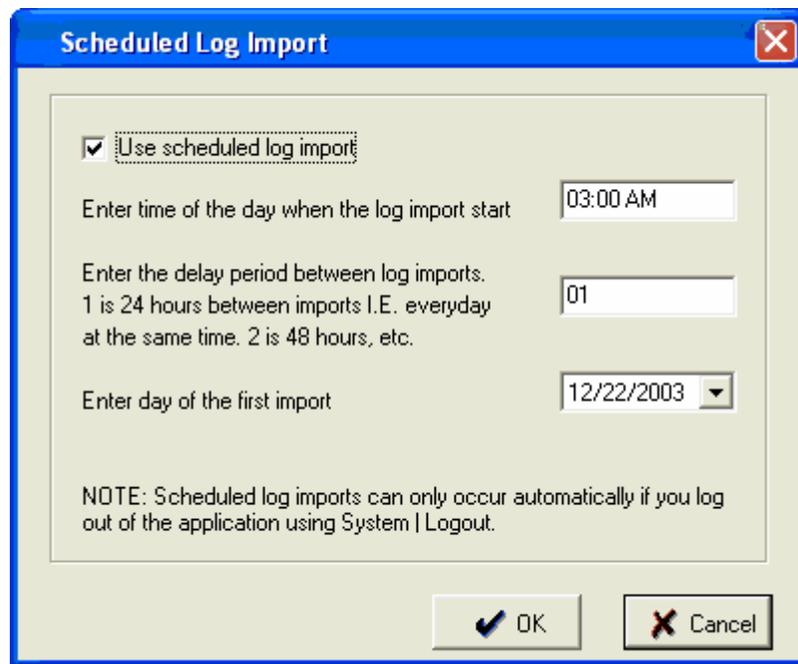
8.8 Scheduled Log Import Reminder

See also Scheduled Log Import

If you are logged into the SofLink Plus when the Scheduled Log Import is set to run, this warning will appear asking you if you want to run the import now.
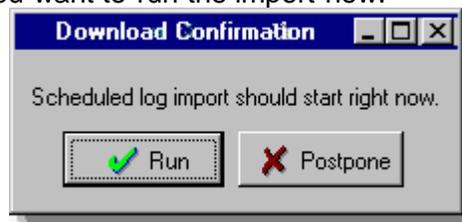
If you had intended for the scheduled log import to run automatically without any user intervention, you must log out of SofLink Plus using the **System | Logout** menu command.

Forcing you to logout is done as a safety precaution so that the software can be left running and set to import logs automatically, but not be left in a vulnerable "logged in" state where someone may be able to see sensitive information such as access codes.

8.9 Table Initialization

WARNING: THIS PROCEDURE RESULTS IN UNRECOVERABLE DATA LOSS!!!
The Table Initialization option initializes (resets to zero) the SofLink Plus program's databases. You can select from several types of initialization:
Database - all operator entered data, including all users and door settings
Transaction Log - just the transaction log data
Audit Trail - just the operator audit trail

1. Select **Tools | Table Initialization** from the SofLink Plus main menu to access the Table Initialization program. The Initialization of Databases screen displays.
2. Select the type of initialization desired, "Partial" or "Total." Total loads the default information when done.
3. Check the databases (tables) you wish to initialize, under "Databases." Next, select the type of optional "Log" desired, "Log" or "Audit." Then click the **Run** button. A confirmation prompt displays.
4. Click **Yes** or **No** to reply as appropriate. If you click Yes, the program performs the specified database initialization, displaying the results under the right-hand "Results" column as shown in the example.

8.10 Application Initialization

The Application Initialization option defaults the program's parameters back to an "Out of Box" state. These parameters include the "Scheduled Log Import" program and some of the folder paths back to the default. Using this option in conjunction with the "Total Database Initialization mode returns all databases and programs settings to the default "Out Of Box" settings. It would be the equivalent of deleting all databases and reinstalling the SofLink Plus software.

1. Select **Tools | Application Initialization** from the SofLink Plus main menu to access the Application Initialization program. A confirmation prompt displays.
2. Click **OK** or Cancel to reply as appropriate. If you click OK, the program resets all application settings to the default values and then displays a prompt at the end (not shown).
3. Click **OK**.

8.11 Indexing

The Indexing option indexes the SofLink Plus program's databases. Indexing reorganizes all the records in each database so that user access is faster and more efficient. Running this option is not usually necessary. No data is modified during this process.

1. Select **Tools | Indexing** from the SofLink Plus main menu to access the Indexing program. The Indexing screen displays.
2. Click the **Run** button to continue indexing or the **Back** button to return to the main menu. A confirmation prompt displays. If you click Run, the program performs the indexing, displaying the results under the right hand "Results" column.
3. Click the **Back** button to return to the main menu.

NOTE: If you ever receive an Indexing error within SofLink Plus, perform the Indexing option to resolve.
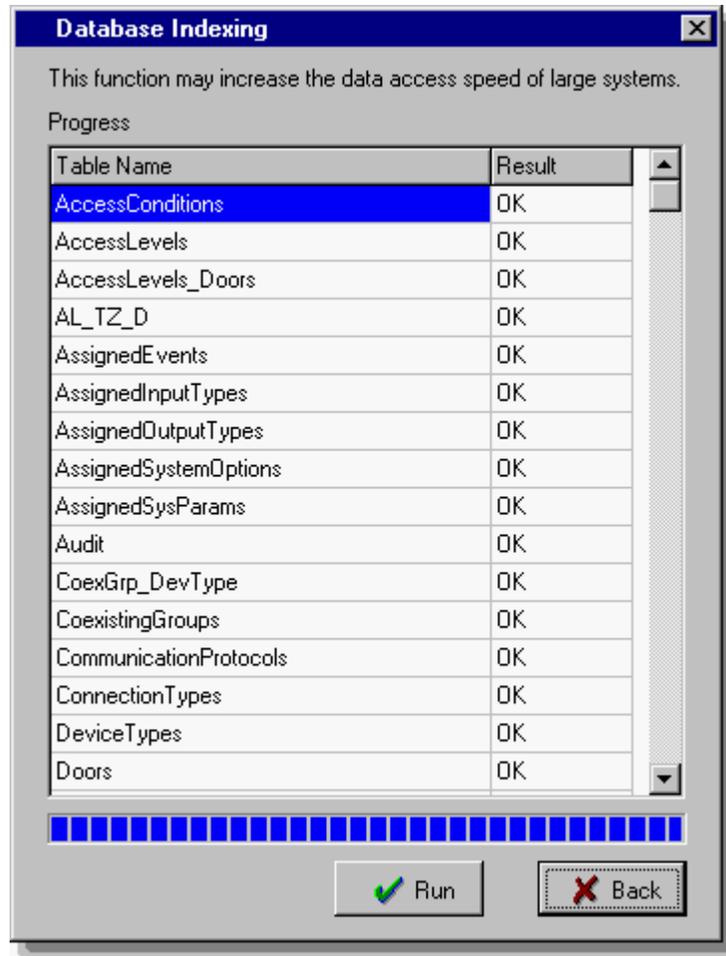
8.12 Options

Report Writer

These options regard the creation of the Report Writer database.

The 'Report Writer Database Copy' is a feature the creates an exact copy of the current database the program is working from. The copy is made to allow a 3rd party report writing program such as Crystal Reports to access the data and for the purpose of creating custom reports. This allows the SofLink Plus database to maintain data integrity, by not allowing access to the actual data, and at the same time, give the data to an outside source.

Report Writer Database Path
This is where the database copy will be stored.

Report Writer Database Password
This is the password that will be required to open the database copy within the 3rd party report writer.

Auto-Update Options
Specifies when the database copy will be updated. Selecting all 3 will keep the database copy most up to date.

Silent Report Database Copy

Enabling this option stops any nag messages from prompting the operator to select OK or Cancel to the copying procedure.
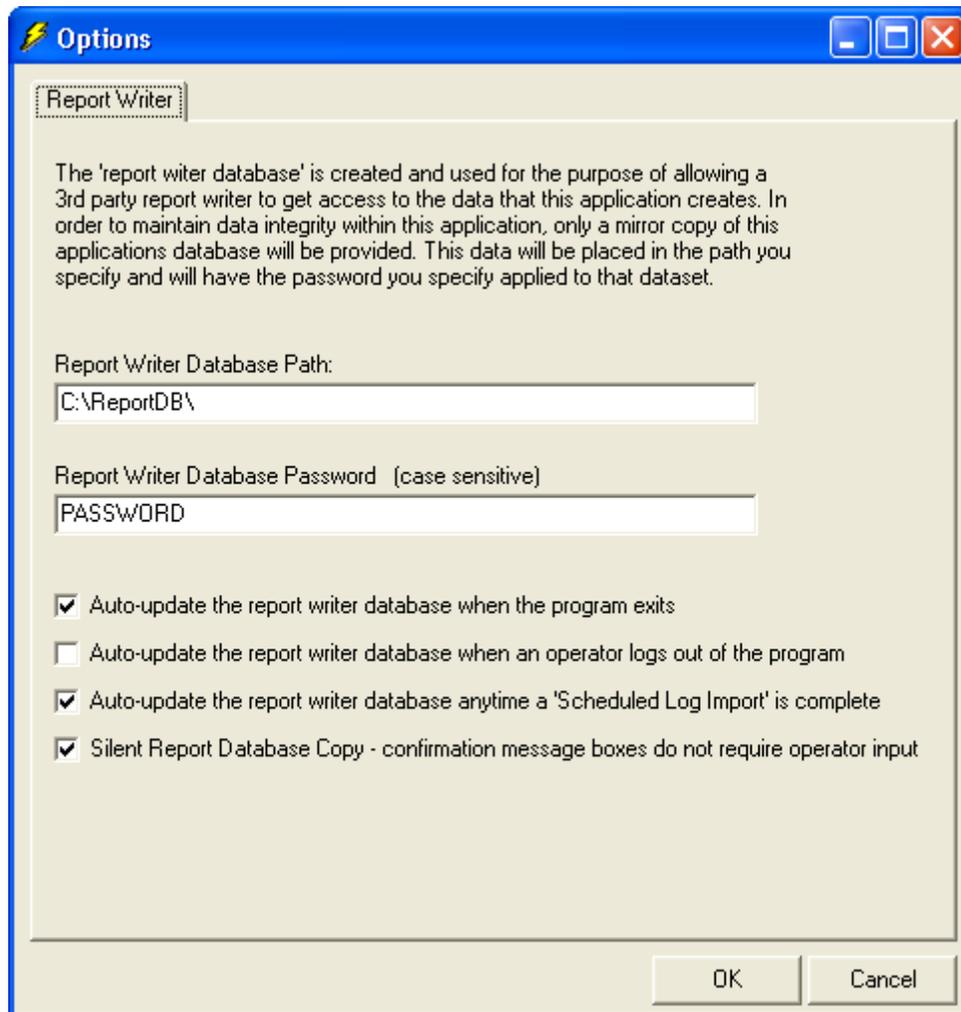
9   Reports

9.1   Reports Menu

Select **Reports** from the SofLink Plus menu. The Reports drop-down menu displays.

Once you select the specific type of report, the software displays prompts to engage you in the print reports dialog. The first prompt requests that you specify the information you wish to see in the report, the second lets you specify the output device. You can print reports to the Monitor (screen), the Printer, or a File; if you select File, you must enter a name for the file in the "Filename" field. You direct the software to print the report by clicking the **Print** button.

see also:
Database Printing
Log Filter
Time Management
Misc. Reports
Audit Report
Archive Viewer
Generate Report Writer Database
Scheduled Log Import Errors

9.2   Log Filter

The Log Filter reports contains details of the transaction logs from the controllers connected to the system. You can modify the contents by selecting different parameters.

Only those events that are supported by the selected door types will be displayed on the right.

1. Select **Reports | Log Filter** from the SofLink Plus main menu. The Filtered Log screen displays (see screen shot below).
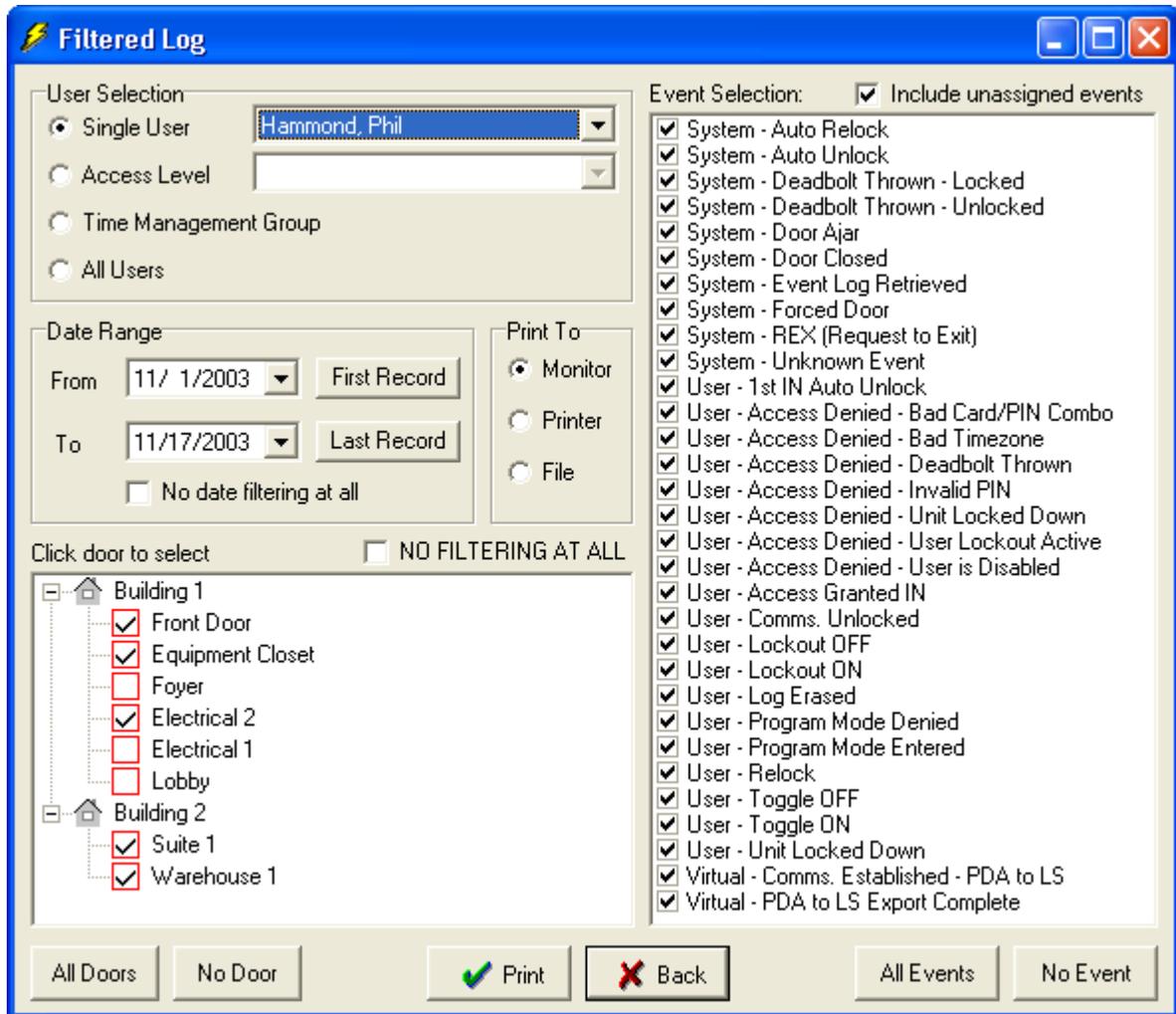
2. Specify the information to appear on the report on the Filtered Log screen. Enter the desired "User" and "Access Level"; check "Time Management Group" and/or "All," if required; specify the "From" and "To" dates; double-click the desired door; and check the desired events on the right-hand side (or use the "All" buttons).
3. Specify the desired output device for the report (on the bottom left of the screen): Monitor (screen), Printer, or File; if you select File, you must enter a name for the file in the "Filename" field. "Monitor" is the default choice. Click the **Print** button to print the report.

NOTE: The Log Filter report is best printed is landscape format so that all the data in all columns will fit.

No date filtering at all

Enabling this option will cause the report to disregard any date filter you may have entered. This will allow you to see the entire contents of the transaction log, and can be helpful if events were imported with wrong time\date data that may have accidentally been outside the range of the date range criteria,and therefore caused those events to not be displayed in the report. The report will be sorted by date and time.

NO FILTERING AT ALL

The Reports | Log Filter report now has a checkbox label 'NO FILTERING AT ALL'. Enabling this option will cause the report to disregard any filter you may have entered, including users, access

levels, doors, events, or date range. This will allow you to see the entire contents of the transaction log, and can be helpful if events were imported with data that may have accidentally been outside the range of the filter criteria. The report will be sorted by date and time.

First Record \ Last Record

These buttons will search the Log Table for the oldest or newest events and set the From and To filters to those respective dates.

If the operator selects the 'First Record' or 'Last Record' buttons and there are no records in the Log table at all then a message will be displayed 'There are no records in the log table to sort. You must import a log first.'.

"Unknown User ID"

There is an event that may appear in your Log Filter Report that says 'Unknown User ID: X' (where X is a user location reference). There are a few reasons that this event will be generated by SofLink Plus.

1. Regardless of the controller type, this event will be generated if someone were to go into programming mode manually at the controller and try to add a user code for the purpose of 'hiding' it because they are trying to breach the security system. The reference number that is assigned to this event in this case will be the user location that the code was assigned to during manual programming. For example if someone tried to hide a code in user location 2000 of the controller, then when this code were used to gain access, after the log was imported in the program the event would be generated as 'Unknown User ID: 2000   Access Granted - IN'. If you see this 'Unknown User' event and your system has been up and running for some time, and you know you have imported logs from this door previously, then the chances are good that someone has manually programmed a user into the controller. To remove this user, you should perform a full export to this controller, by removing the checkmark from the 'Export Changes Only' checkbox on the Export To Doors form.
2. Regardless of the controller type, any user generated events that occurred before SofLink Plus had exported user data to this controller will cause 'Unknown User ID' events to occur. This is because all user created events of these device types are tagged with an ID of the user that was used to trigger that event. When SofLink Plus exports user data to the controllers, it assigns a unique 'User ID' that it knows and is not present on new or defaulted controllers. If you see one of these 'Unknown User ID' events during your initial Log Import from either of these device types, you can dismiss it. Because these events occurred before the program and controller were synchronized. If you have already exported to this controller, then any subsequent Log Imports will not generate this 'Unknown User ID' event, except for the other reasons that this event may be generated as noted in this section.
3. This 'Unknown User ID' can also occur if you were to install a controller that had previous transaction log event data in the controllers event buffer memory. To stop this event from occurring on newly installed controllers, whether it be new or used, that you erase all system data as well as defaulting the log data. The programming commands for most of your controllers would be to enter programming mode and enter 46# 00000# 00000# * * to delete system data and also 76# 00000# 00000# * * to delete transaction log data. Always refer to the programming manual that came with the controller for the commands.

9.3   Misc. Reports

The Misc. Reports show briefly what days a user was logged in or who was logged in on a certain day. You can modify the contents of the report by selecting different parameters.

1. Select **Reports | Misc. Reports** from the SofLink Plus main menu. If data is present, the Misc. Reports screen displays.
2. Specify the information to appear on the report on the Misc. Reports screen. Enter your "User Selection" choice, the appropriate "Date Range," "Report Type," and the "Print To" output device for the report: Monitor (screen), Printer, or File. If you select File, you must enter a name for the file in the "Filename" field. "Monitor" is the default choice. Click the **Print** button to print the report.

9.4 Time Management

NOTE: The Time Management Report requires controllers that can record both 'User IN' and 'User OUT' events. All controllers can generate 'User IN' events but not all controllers can generate an 'OUT' event. The devices that are currently supported in SofLink Plus can not create an OUT event. This report and other references to "Time Management" should for the mean time, be disregarded.

The Time Management report prints details of the transaction logs from the controllers managed by the system. You can modify the contents by selecting different parameters.

This report calculates how long a user was "IN" on a particular day. It gives both the "gross time" and the "clear time." Clear time is the gross time minus the time that the user clocked out for breaks. A requirement for running this report is that users must come "IN" on a controller set to Log as "IN" and users must go egress using a controller set to "OUT." If the program does not see an opposing "IN" or "OUT" event for that user, an appropriate error will be printed on the report for that day, such as the term "Missing" in the 'OUT' event column.

1. Select **Reports | Time Management** from the main menu. The Time Management screen displays.

2. Specify the desired "User Selection" choice, the desired "Date Range," highlight the desired doors, and "Print To" output device for the report: Monitor (screen), Printer, or File. If you select File, you must enter a name for the file in the "Filename" field. "Monitor" is the default choice. Click the **Print** button to print the report.

9.5   Database Printing

The Database report shows all programmed items within a certain database. Simply select the type of Database report you would like to generate.

1. Select **Reports | Database** from the SofLink Plus main menu. The Database screen displays.
2. Specify the information to appear on the report on the Database screen. You can select the contents of these databases: Time Zones, sites, doors, access levels, users, and holidays.
3. Specify the desired output device for the report: Monitor (screen), Printer, or File; if you select File, you must enter a name for the file in the "Filename" field. "Monitor" is the default choice. Click the **Print** button to print the report.
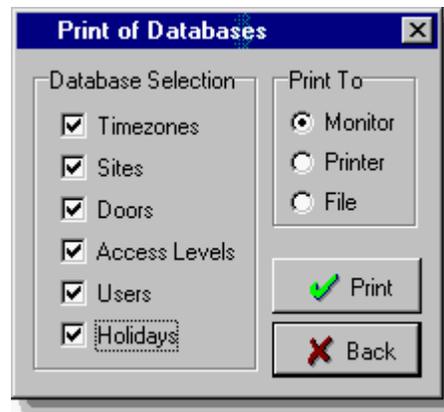
9.6 Audit Report

The Audit report contains a listing of operator activity, database modifications, and times of the activity.

1. Select **Reports | Audit** from the SofLink Plus main menu. The Audit screen displays. All Audit Trail data displays.
2. Specify the desired output device for the report: Monitor (screen), Printer, or File; if you select File, you must enter a name for the file in the "Filename" field. "Monitor" is the default choice. Click the **Print** button to print the report.

9.7 Archive Viewer

The Archive Viewer report permits you to open either Log or Audit archives for viewing. For more information on archiving, see Log Archiving and Audit Archiving.

1. Select **Reports | Archive Viewer** from the SofLink Plus main menu. The Archive Viewer screen displays.
2. Specify the desired type of Archive report, "Log" or "Audit" and click the **Open** button. A Select Archive screen displays, with which you select the Log or Audit file you wish to view. You can navigate to the desired directory using standard Windows techniques.
3. To print these files, open them in another program that can read .CSV files such as Microsoft Excel.

9.8 Generate Report Database

This option will start the Report Writer Database Copy.

See Tools | Options for details on the 'Generate Report Database' option.

9.9 Scheduled Log Imort Errors Report

The Schedule Log Import Errors report presents a list of recorded error events with a description for each. These are errors that occur either during the scheduled importing of transaction logs or any errors that occurred during the "Import Log from All Sites" option. The program operates in this fashion because both of these options import the logs even if an operator is not present, and some method is required to determine if any errors occurred during the automated process. Select **Reports | Schedule Log Import Errors** from the main menu. The system processes your request for this report and then displays the results as shown in the example below. After viewing the errors, they are moved into the Audit Trail log.

10 Help

10.1 Error Messages

Here are some error messages and potential resolutions:

When I run SofLink Plus I receive an error of:
Network Initialization Failed.
Permission Denied.
File C:\PDOXUSRS.NET
Directory C:

> This error is commonly seen on Win 2000 or Win XP and is normally caused by restrictive permissions of the Windows login user name that is currently logged in. The database engine may require a system drive to store temporary files. System drive access may require Administrator rights.

> RESOLUTION: Have the administrator change the permissions of this Windows login to have access to the C:\ drive, or give this user full administrator privileges.

When I install SofLink Plus I receive an error of "Insufficient Disk space".

> This error is commonly seen on Win 2000 or Win XP and is normally caused by restrictive permissions of the Windows login user name that is currently logged in.

> RESOLUTION: Have the administrator change the permissions of this Windows login to give this user full administrator privileges.

When I try to save a record I receive an error of "Saving error".

> This error is commonly seen on Win 2000 or Win XP and is normally caused by restrictive permissions of the Windows login user name that is currently logged in.

> RESOLUTION: Have the administrator change the permissions of this Windows login to give this user full administrator privileges.

10.2 Glossary

> **Auto Unlock** When this feature is enabled the Time Zones specified as Auto-Unlock Time Zones will be used to automatically unlock at the Time Zone start time and re-lock at the Time Zone stop time.

> **Card Number** The card number is the electronic code contained in an access card used to gain access to a door. The code is read electronically by a card reader. (This definition also applies to Mag or Prox cards and Touch Chips.)

> **Code Number** The access number that the user enters on a keypad to gain access to a door. It can be 1 to 6 digits in length. The longer the code, the greater the security. It only takes 9 attempts to find a 1-digit code.

> **Code PIN** See Code Number.

> **Com Port** This is the serial communication port on a personal computer through which the SofLink Plus software communicates with the hardwired controller network.

> **DB9** This is a 9-pin connector that is shaped like an elongated "D"; it can be found on the back of a computer. A typical IBM compatible PC has a DB9 connector for the COM1 and COM3 com ports.

DB25 This is a 25-pin connector that is shaped like an elongated "D"; it can be found on the back of a computer. A typical IBM compatible PC has a DB25 connector for the COM2 and COM4 com ports.

Door In this manual, the term door is used synonymously with the term controller, Door Controller, or Door Control Module. When referring to "Door Status"what is really being said is "Controller Status."

Export The action of sending Door Settings information from the SofLink Plus software to the controllers.

Forced Door Alarm This is the programmable feature in a controller whereby the Forced Door relay located in the controller is activated for a specified time when the controller detects that a locked door has been forced open. Note: This requires that a door position detection device has been properly installed.

Import The action of retrieving information from the controller network into the SofLink Plus software.

Keypress Feedback This is a feature the controller whereby a yellow LED light is flashed or a sonalert device is beeped (depending on installed equipment) with each keypress on a keypad.

Log Short for Transaction Log. The log is a list of recorded events for a particular door.

Master Code This code is used to enter programming mode on a controller. It is located in User #1. The name of User #1 is defaulted to System Administrator.

PIN Acronym for Personal Identification Number. See Code Number.

System Administrator This term refers to User #1 which contains the Master Code.

10.3 Help

The electronic Help file is context sensitive. This means, for example, that if you press F1 while the Access Levels Edit screen is open in SofLink Plus, the Help file opens to the topic that describes Access Levels.

10.4 About

This screen contains information about the SofLink Plus program. This is also the screen where you can edit the support contact information that appears in the lower right of the main screen. In order to edit these fields, you must log in to the program using the Administrator login name and password. This login was initially named SARGENT, but may have been changed. If you have more than one login operator in the system and you are not sure which one is the Administrator, it is easy to recognize. Assuming your login has full access rights to the operator database, if you open each operator in the list for editing, the Administrator operator will have the Toggle, Enable All and the Disable All buttons disabled (the text will appear gray, see below).
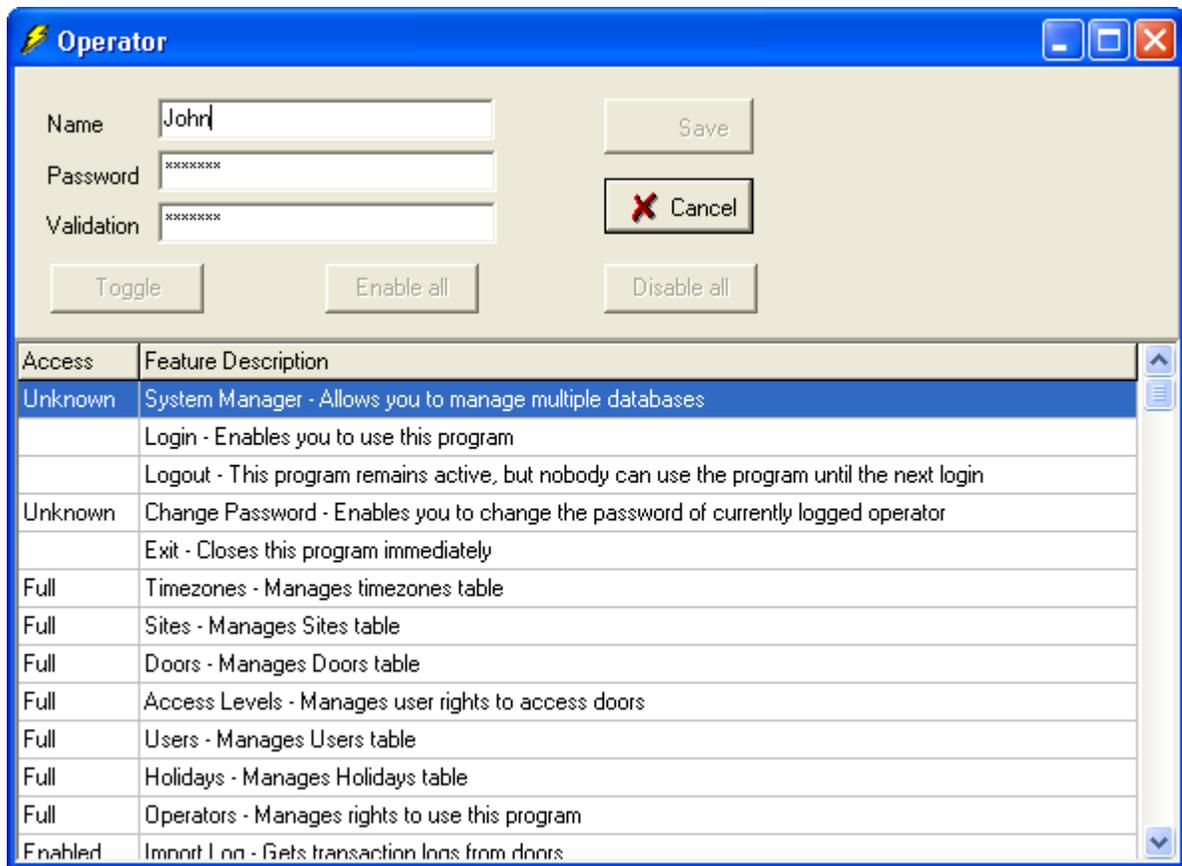
If you now log in with this operator and go to **Help | About**, you can now edit the Support Contact Information.

The Administrator Operator always has FULL access to all areas of the program. The options can not be edited, and this operator can never be deleted.

see also:
Obtaining Technical Support

11   Obtaining Technical Support

11.1   Obtaining Technical Support

Should you experience any difficulty installing or operating the SofLink Plus software, please contact your installer.

The installer information can be found in the bottom right corner of the SofLink Plus main screen, or go to **Help | About.**

12   Copyright Information

12.1 Copyright Information

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