

**SARGENT**  
**SofLink Plus™ 5**  
**Access Control Software**  
**User Manual**

**SARGENT®**



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# 1 Using Online Help

## 1.1 Using Help



### Hardcopy Version

Some references in this manual are designed for use with the electronic version. The electronic PDF version can be found in the following folder:  
 C:\Program Files\SARGENT\SofLinkPlus5\Program\SofLinkPlus5\Manual.pdf

### 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 select 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

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



## 2 Foreword

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### About This Manual

This manual is designed for users of **SARGENT SofLink Plus 5** software in conjunction with Profile Series v.G1™, Profile Series v.G1.5™ and 4293 Wall Prox controllers. All installation, setup, operational information and procedures, accompanying 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

Neither this manual nor any part of it may be reproduced, photocopied, or electronically transmitted in any way without the written permission of SARGENT.

### Technical Support

Should you experience any difficulty installing or operating the SofLink Plus software, please contact your installation/service company or SARGENT at 800-810-WIRE (9473).

### 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.

#### 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 or by using the TAB key to bring focus to a component and then acting upon that component by pressing the <ENTER> key or the SPACEBAR.

**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, Cancel, and Done Commands**

Most screens and/or dialog contain two command buttons that are used to close the dialog box: Save and Cancel.

When you select the **Save** button, the program saves the current data or settings and returns to the previous screen.

When you select the **Cancel** button, the program discards any and all edits and then returns you to the previous screen.

A **Done** button will be displayed when no data is being edited, such as when you are viewing one of the directories: Sites, Time Zones, Doors, Access Levels, Users, Holidays or Operators. When you select the Done button, the program will simply close the current screen (window) and return you to the main screen of SofLink Plus.

**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. Selecting 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 5** software. It also supplies procedures for installing or using various SofLink Plus 5 software components. SofLink Plus is an access control management program for Microsoft Windows operating systems (2000/XP) used in conjunction with SARGENT's access control equipment.

#### Operating Systems

SofLink Plus is qualified to work on Microsoft Windows 2000, XP Home, and XP Professional.

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, select **Start | Run**, browse to the CD-ROM drive, select the **Autorun.exe** file, then select **Open** and **OK**.



2. Select **Install SofLink Plus 5**, the top choice in the screen. The Install program displays a Welcome

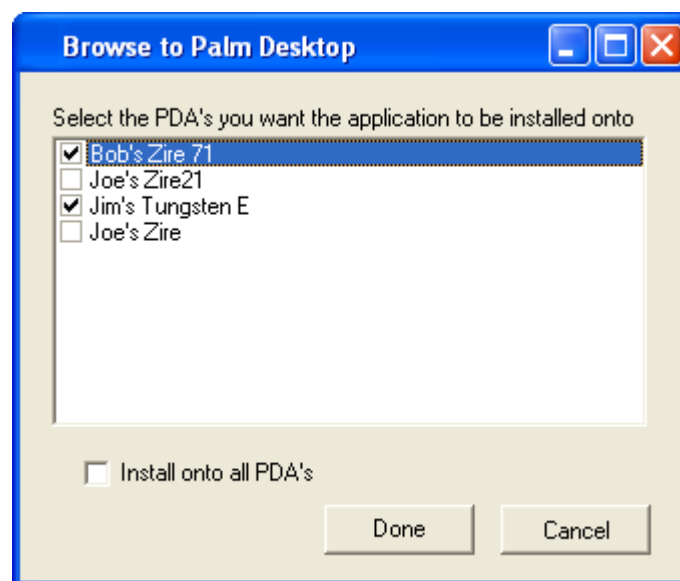
- screen.
3. Select **Next**. The Software License Agreement screen displays.
  4. Use the scroll buttons to scroll through and read the agreement. Signal your acceptance of its terms by selecting **Yes**.
  5. Use the scroll buttons to scroll through and read the information, then select **Next**. The Start Copying Files screen displays.
  6. If the listed current settings are acceptable, select **Next**. If not, select **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. Select the corresponding check box and **Finish**.
  9. The SofLink Plus 5 installation is complete.

### SofLink PDP Software Installation on a Palm OS PDA

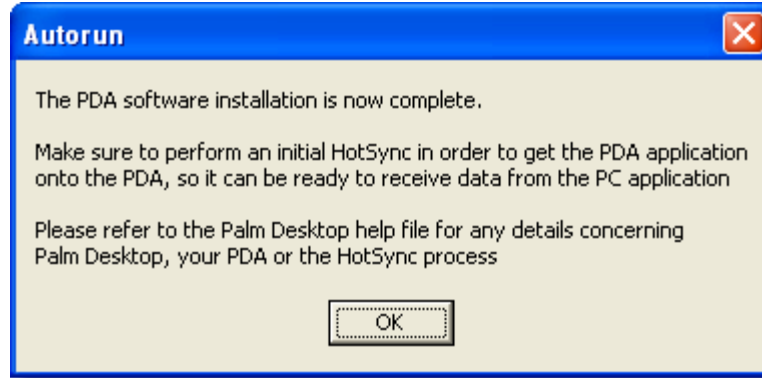
**NOTE:** Refer to the topic named [PDA Software](#) in the Overview section for additional details regarding the PDA software.

**IMPORTANT NOTE FOR CURRENT SofLink PDP PDA SOFTWARE USERS:** If you are currently using a version of the SofLink PDP that was distributed with SofLink Plus 4 or earlier, then you must install the latest SofLink PDP version that ships with SofLink Plus 5. Use of the previous version will result in incorrect operation of the SofLink PDP PDA software. The version of SofLink PDP PDA software you must have to operate with SofLink Plus 5 must be version 4 or greater. To check your version of PDA software, go to the main screen of the SofLink PDP PDA software, and tap the titlebar where it says SofLink PDP. A **Help** menu should appear. Now select **About** to display the application version number. If this number is less than 4, then you must perform the installation from the SofLink Plus 5 CD.

1. Select **Install SofLink PDP** (on the SofLink Plus install CD)
2. The install program displays a Confirmation Screen. This message is displayed to remind the user that Palm Desktop and HotSync 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.
3. Select **OK**.
4. Select the individual PDA's you want the SofLink PDP program installed onto, or you can select the 'All' checkbox to place the application onto all of the current PDA's. Select **Done** to continue.



5. Following the steps in this screen will result in the SofLink PDP software being loaded onto the PDA the next time you perform a HotSync with the PDA.



6. Now perform a HotSync with each of the PDA's that you decided to install the PDA software to. You will then see the SofLink PDP program icon in the applications screen of those PDA (see figure below).



## 4 Overview

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### 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 5 | ReadMe**

#### Operating Systems

SofLink Plus is qualified to work on Windows 2000, XP Home, and XP Professional.

All software must be installed using a 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 5** 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 select **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 Login Name and 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 5

#### 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 your 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 access credentials of [users](#) in the system. An available [wizard](#) lets you import names from a CSV (comma separated value) file when creating users. A CSV file is a simple text file that separates the fields with commas.

#### Transaction Logs

The SofLink Plus software can be used to retrieve the transaction logs from controllers, save the transactions into the database, and view and print the reports based on the data. [Transaction logs](#) can be exported in a comma-delimited format, which is 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

An unlimited number of [Time Zones](#) can be created; each controller 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 can be assigned to most controller types, each one can be designated as an Auto Unlock, which works as an auto unlock for that door controller only, as long as that particular door controller has the Auto Unlock system option available and that option is enabled.

### Sites

Up to 1,000 [Sites](#) can be created using SofLink Plus. Each site can consist of any device type and connection type. These sites share [users](#) from the same list of 20,000 users. There is a limit of how many doors can be included in each site type, but that number is based on the controller type. If you have more doors than is allowed in a site, then you must create another site and add the overflow to that second site.

	Maximum Doors Allowed Per Site
Profile Series v.G1™, Profile Series v.G1.5™	300
4293 Wall Prox	32

### 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 select on any of the Time Zones to see the detail of that Time Zone.

### Door Controller Type Selection

Enables features supported for that door controller type.

### 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, toggle, log dump, or relocate). Access level also specifies the "Time Zones" applied to a user. The time zones can be different for each door.

### Users

20,000 users total. A subset of [users](#) from the list of 20,000 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 the name, access level, and access credentials are set up on the user screen. Users are not directly assigned to door controllers, 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 credentials 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.



## 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 the system, which support block holidays. Profile Series v.G1™, Profile Series v.G1.5™ and 4293 Wall Prox controllers support Block Holidays.

## 'Connect To' Sites

Each individual site must be 'connected to' before exporting, unless you use the 'Export To All Doors in All Sites' option. Connecting to a site is the software's process of deciding which method is used when communicating with a particular controller type, and then performing all communications initializations for that communication method. Once 'connected to' a site, you can choose to export to all doors in that site or any combination of the doors in that site.

## 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.

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 is not 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 is 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 the transaction logs from each door in each site. It will attempt to connect to each of the other sites automatically, dependant upon the connection type of that site. All transaction log data that is imported is appended to the existing database.

On PDA connected controllers, this feature attempts to import transaction log that has been placed onto the PC during the PDA HotSync process. This is helpful if you allow people to HotSync the logs to the PC, and then have the scheduled log import feature import them into the database, such as if guards are responsible for visiting doors, pulling logs and then docking the PDA and running HotSync, but the guard can not perform any actions in SofLink Plus.

**NOTE:** You must [log out](#), but not exit, for 'Scheduled Log Import' to work properly. If an operator is logged

in to SofLink Plus, the log import process 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. This feature will only query the site that you are currently connected to, and it attempts to query all the possible doors that could be at that site, one door 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. 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 type. It does bring the selected 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 5. This utility (if it exists, named "Conversion.exe," may be located in C:\Program Files\SARGENT\SofLinkPlus5\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, or any combination of events.

### Misc. Log Reports

Three types of canned reports are available. The first report type lets you see the very first and very last events on a particular day for each door controller. The second report type allows you to see a list of the different days that a particular user had used the access control system. And the last report type shows all the users that used the access control system on a particular day.

### Assignment Reports

A collection of reports that allow you to see which items are assigned to other items. Such as: "Show me all the Doors that are assigned to the selected Access Level"

### Database Report

This report shows all programmed items within a certain database.

### Help File

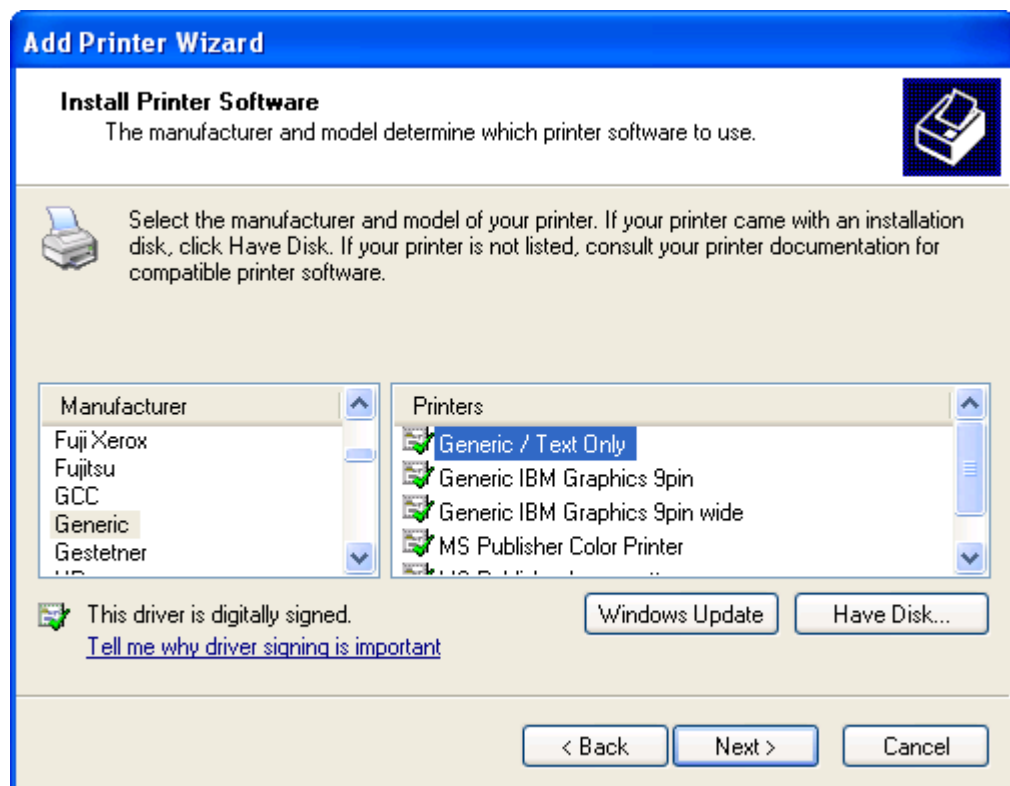
Help file is included, you are now reading it, either electronically or in hardcopy format.

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

### Printing to Monitor (screen), Printer, or File

Every place that printing is available, a standard screen prompts the user where to print the data: monitor , 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. 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, you can typically use the Generic / Text Only printer driver installed on most PC's.



**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 Initial Set Up

### Organizing for SofLink Plus Access Control

Getting ready for programming your 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 access credentials such as a card, RF Fob, Personal Identification Number (PIN), or other form of credential, and then assigning that 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 for 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:

**Sites**

Setup and identify the sites in this form

**Time Zones**

Input logical facility work group schedules by days and times

**Holidays**

Dates when access can be denied to some and granted to others, based upon the setup of the Time Zones

**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 credential combined with an Access Level that can control employee or visitor access by door, time, day of week and even holiday automatically

**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.

**Preparing Work Schedule**

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

**Preparing Sites**

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.

**Preparing 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

### Preparing 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 (propped door) events.

### Preparing 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.

### Preparing Users

Using the SofLink Plus [User](#) screen, fill in the names, access credentials 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 (propped door), 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.

## 4.3 Menu System

### Describing the Menu System

The menu system of the software includes the following commands:

#### SYSTEM

[System Manager](#)  
[Login](#)  
[Logout](#)  
[Change Password](#)  
[Exit](#)

#### DATABASE

[Operators](#)

[Sites](#)  
[Time Zones](#)  
[Doors](#)  
[Access Levels](#)  
[Users](#)  
[Holidays](#)

## COMMUNICATIONS

[Import Log](#)  
[Import Log From All Doors in All Sites](#)  
[Import Door Settings](#)  
[Export To Doors](#)  
[Export Data to All Doors in All Sites](#)  
[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](#)  
[Misc Log Reports](#)  
[Assignment Reports](#)  
[Database](#)  
[Audit](#)  
[Archive Viewer](#)  
[Generate Data for External Report Writer](#)  
[Scheduled Log Import Errors](#)

## HELP

Help (you're reading it now)  
[About](#)

## System Main Menu Commands

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

### System

Provides a means of:

- launching the System Manager feature which allows you to create, delete, and switch between other SofLink Plus databases you have created
- "logging into" the program
- "logging out of" the program
- modifying current login password for the currently logged in operator
- 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 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 program. Select **System** from the main menu. The System drop-down menu displays.

## 4.4 Running the software

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

1. Double-click the SofLink Plus 5 shortcut icon that the install program placed on your computer desktop or on the shortcut on the Start Menu.
2. Select Start | Programs and double-click on the SofLink Plus 5 shortcut. The Main window displays, with the Login form.

**NOTE:** The first time you start the program, you are prompted to enter support contact information in a small dialog box. Enter the contact information and select **Save** to save it. This information can be changed by going to **Help | About** while the administrator operator is logged in.

**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, dependant upon the door controller type and communication type you are using.

1. Install the door controller hardware successfully and program the controller address into each door controller (if required by that particular controller 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](#) section and read this material to learn the basic concepts behind setting up [Sites](#), [Time Zones](#), [Holidays](#), [Doors](#), [Access Levels](#), and [Users](#).
4. Run the SofLink Plus program.
5. Create all of your [Sites](#) using **Database | Sites Add** button.
6. Create the [Time Zones](#) needed for your system requirements.
7. Create [Holidays](#) as applicable.
8. Create [Doors](#) and assign the Time-Zones needed in each door controller, and modify any of the default controller options as needed.
9. 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.
10. Go to [Access Levels](#) and create the Access Group privileges for that **Access Level** based on the



diagnosis.

11. Go to [Users](#) and create the names and define that users access credential fields.
12. Choose **Communications | Export to All Doors In All Sites** to export data to each door controller in the system. If you have directly connected controllers in your system, the Time and Date will also be updated during this process, assuming you have left the '**Update Time\Date in controller**' checkbox enabled.
13. 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 with the PDA running the SofLink PDP software. Refer to the [PDA Software](#) section for the details on sending/receiving data via SofLink PDP. You should then return to the PC with the PDA and perform a final HotSync which will let the PC host program know that the data made it to the PDA managed controllers successfully.

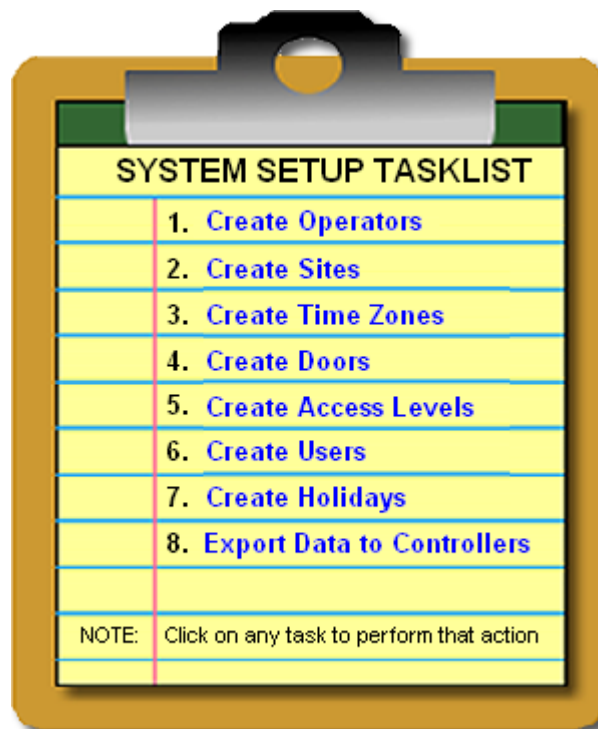
## 4.5 System Setup Tasklist

### Overview

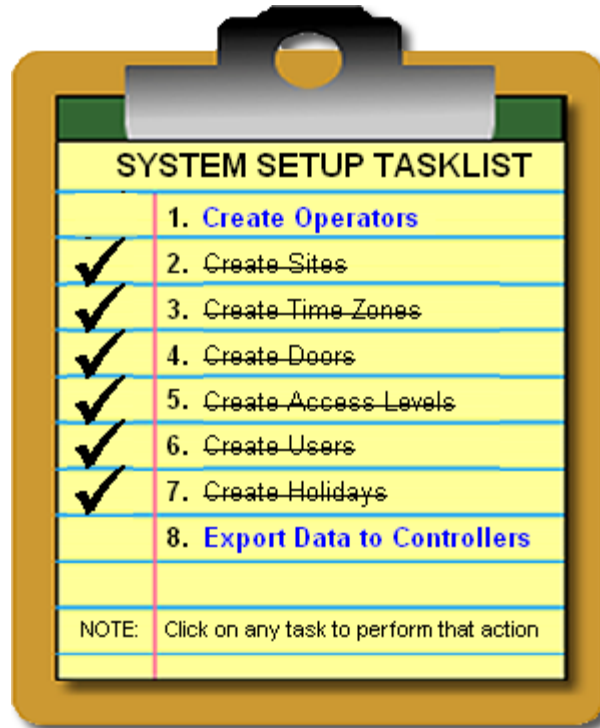
The System Setup Tasklist is displayed to help guide you through the steps needed to completely and thoroughly set up a new system.

If you are managing multiple Systems using System Manager, then each new System you create will have a fresh Tasklist, since all of these Tasks are related to each individual System.

Clicking on any of the blue links will bring you to the specific screen that performs that action. For example: if you click on the **Create Sites** link, then the Sites directory will be opened, where you can then select the Add button to create a new Site.



Once a task is completed, that task will be crossed off the list, the link to that task will no longer be active, and a checkmark will appear next to it showing you that the Task is completed.



Inactive links will become active again, if the action that removed that link is no longer true. For example: if you delete a Site and there are no longer any Sites left in the System then the **Create Sites** link will once again become active.

There are some Tasks that do not require that you actually *Add* an item, but it is required that you at least visit that screen in order to have that Task seen as completed. The Tasks that you are required to at least visit are: Create Time Zones, Create Holidays, and Create Operators. The other Task that is not actually monitored for success is Export Data to Controllers. Just the act of opening the Export screen is enough to complete this particular Task.

It is recommended that the Tasks be performed starting with the first Task and ending with the last Task. Several Tasks require that other Tasks be completed first. In these cases, you will be brought to the Task that is required. For example: if the very first Task you select is **Create Doors**, you will receive a message saying 'you must create a Site before you can add a door', and you will then be brought to the Sites directory where you should then add a Site.

Once all of the items in the System Setup Tasklist are complete, the list will be removed from sight. Once the Tasklist is removed, certain action you perform may bring make the Tasklist visible again. These actions include:

- performing a Database Restore from a dataset that does not have all of the *required* Tasks completed (Tools | Database Restore)
- performing a Tools | Database Initialization
- enabling the option that says to display the Tasklist even if all tasks are completed

## 4.6 Converting Data

**WARNING:** Performing this data migration function will overwrite any existing data you may have stored in SofLink Plus 5. If you have any data in SofLink Plus 5 that you need to save, perform the "Backup" function under the Tools menu, and select a folder that is outside the SofLink Plus 5 folder structure.

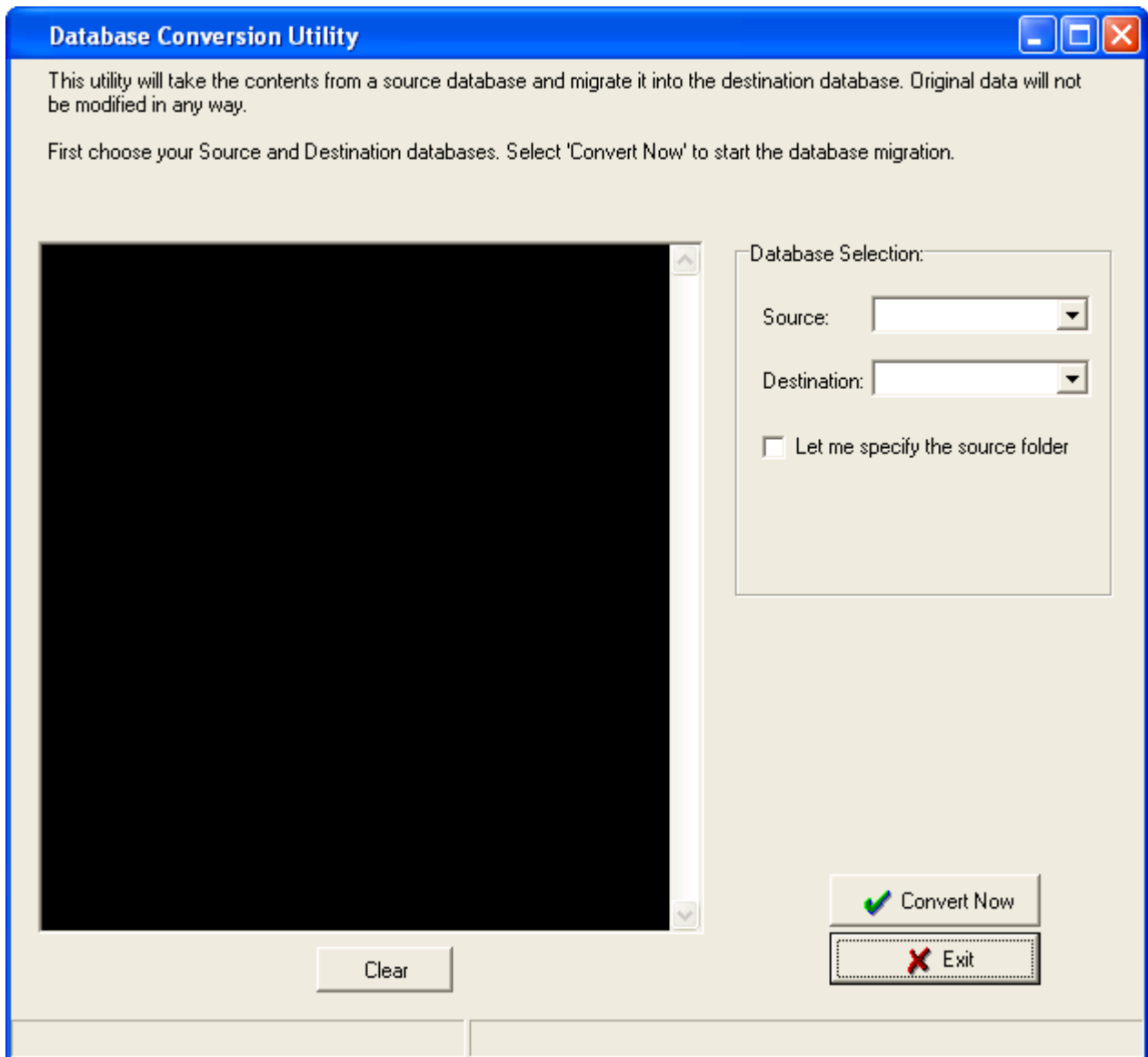
A utility is provided to allow you to migrate an existing SofLink Plus database into SofLink Plus 5. This utility is located in the following folder:

C:\Program Files\SARGENT\SofLinkPlus5\Program\Conversion.exe

You may launch the utility by inserting the CD ROM (or running the file downloaded from the web) and choosing the Conversion option. The SofLink Plus 5 software must be installed on that PC before running the conversion option from the CD.

You may launch the utility by using the shortcut located at:  
**Start | Programs | SofLink Plus 5 | Conversion Utility**

1. Run the Conversion.exe utility any location noted above.
2. If you are running from the desktop (Main PC) then double click the following in this order:
  - 'My Computer' icon on the desktop
  - Local Disk C:
  - 'Program Files' folder
  - 'SARGENT' folder
  - 'SofLinkPlus5' folder
  - 'Program' folder
  - Conversion.exe file
3. A screen will appear (see image below) that allows you to select which source data you would like to migrate from, and also which product that the data will be migrated into. The options in the "Source" drop down list let you specify which databases can be used as a source database, and the options in the "Destination" drop down list specify what SofLink Plus database will receive the converted data.



4. SofLink Plus "source" data is not modified in any way; it is merely copied and re-formatted appropriately into the destination database.
5. At the end of the data migration, run the destination SofLink Plus 5 program and run the "Export to All Doors" option with the "Export Changes Only" checkbox deselected in order to properly synchronize the software and hardware.
6. Do not perform a transaction log import until you have successfully performed the "Export to all doors" option.

#### Converting a Database From a Custom Folder

There is an option to let you browse to a custom Source folder and convert/migrate that SofLink Plus database into the destination folder. This is useful if you are installing a newer version of SofLink Plus on a new PC and you want to migrate data from an older version of SofLink Plus that you copied from an older PC to a folder on this new PC.

1. You first specify which version of SofLink Plus database source you are converting by selecting the database type from the 'Source' drop down list.
2. You then select the check box labeled 'Let me specify the source folder'.
3. You then browse to the folder where those database files are located.
4. You then select the Destination SofLink Plus database you are converting to.
5. Finally select the 'Convert Now' button to start the conversion process.

#### Converting a locally stored system in SofLink Plus 4 to a network stored system in SofLink Plus 5

The following steps should be followed if you are upgrading from SofLink Plus 4 to 5 and you wish to now store your data on a network folder for the purpose of giving multiple operators the ability to manage the data, or for the purpose of having the data on a network folder that is automatically backed up by a network administrator.

It is highly recommended that you read the section regarding [System Manager](#) before performing the steps below.

Follow these steps *before* running the data conversion.

1. Run SofLink Plus 5 and Login
2. Enable System Manager by going to Tools > Options > System Manager and place a checkmark next to the 'Enable System Manager' option and choose OK. You will now see the System Manager icon (green triangle) in your system tray. For information on the other options on the screen see the topic regarding [System Manager](#).
3. In SofLink Plus 5 select System > System Manager
4. We will now create a new empty system on a network folder.
5. Select 'Create New System' in System Manager. You may be asked to rename the default locally stored system to make it easier to identify.
6. Specify the name of this system, and select the 'Create' option that says 'a new folder that I will specify'.
7. Next to the folder path is a browse button that has 3 dots on it. Select this button and browse to the network folder you wish to store your system data on. If you want to create a subfolder in that folder select the button named 'Make new folder' in the bottom left. When you are finished select OK.
8. Select 'Create System Now'. You should now see the new system name you just created on the network folder in the 'List of Known Systems' along with the network path where that new system resides.
9. If you know that you are not going to use the locally stored default system, then you may want to perform some housekeeping and delete that local system, by selecting it in the list of known systems, select 'Close Currently Open System'. Then select the 'More' button under 'Advanced Options' and select 'Delete Selected System'.
10. Now select that new system in the list and then select 'Open Selected System'.
11. After the new system has been successfully opened you can then run the Conversion utility and choose to convert from SofLink Plus 4 to 5.

Conversion complete.

## 4.7 PDA Software

### SofLink PDP PDA SW

SofLink PDP is SARGENT's PDA software designed for communication between SofLink Plus and Profile Series v.G1™, Profile Series v.G1.5™ and 4293 Wall Prox controllers. SARGENT's Profile Series v.G1™, Profile Series v.G1.5™ and 4293 Wall Prox controllers are standalone fully integrated electronic access control door locks that communicate via infrared to a Palm OS PDA. These controllers have two way infrared communications capability. By employing a PDA and the SofLink PDP PDA software, SARGENT's controllers can be part of an overall access control system all managed by SofLink Plus.

**NOTE:** Please refer to the topic named [Installation](#) for more details on how to install the SofLink PDP PDA software.

### SofLink PDP System Requirements

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

- SARGENT's SofLink Plus 5 software
- PDA with Palm OS 3.5, 4.x, or 5.x
- HotSync software (provided by PDA vendor)
- 250KB of available memory on the PDA for each controller you are managing.
- See the ReadMe file for the most recent list of known compatible PDA models. the ReadMe is located in [Start | Programs | SofLink Plus 5 | ReadMe](#)

### PDA Data Transfers

The PDA acts as the "connection" between SofLink Plus and the door controllers. 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 HotSync Manager session is executed. Refer to the [Export to Doors](#) section for details on exporting data.

1. Select a site in the Site directory.
2. Choose the **Connect** button.
3. Choose **Communications | Export to Doors** then select the **Start** button.
4. Set the PDA in its cradle and initiate **HotSync** with 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 and initiate a **HotSync** with the PDA. Log data is now on the hard drive awaiting import into SofLink Plus.
7. Choose **Communications | Import Log From All Doors in All Sites**
8. All data between SofLink Plus and the controller is fully synchronized.

SofLink PDP automatically handles all existing door data during the HotSync Manager process. All door export data from the SofLink Plus stored on the PDA prior to the start of the HotSync 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 HotSync 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 information symbol (in the upper right) is functional in all SofLink PDP screens. Selecting the information 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

- Displays the door management screen and provides access to advanced functionality.



- Any door controller with a checkmark in the C column denotes that configuration 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 controller 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 v.G1™, Profile Series v.G1.5™ and/or 4293 Wall Prox 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 several 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

Because there are differences in the way the different models of the Palm PDA hardware access and use the infrared outputs of the PDA, there is a drop-down list allowing selection of what 'IR Channel' (infrared) SofLink PDP is going to use.

Here is a list of known compatible PDA's and the 'IR Channel' (infrared) setting that should be set in the SofLink PDP PDA application.

<u>Make</u>	<u>Model</u>	<u>'IR Channel' Setting (infrared)</u>
Aceeca	Meazura	2
Handspring	Visor	2
Kyocera	7135 Smart Phone	2
Palm	IIIc	1
Palm	IIIx	1
Palm	IIIxe	1
Palm	m105	2
Palm	m125	2
Palm	m130	2
Palm	m500	2
Palm	m505	2
Palm	m515	2
Palm	V	1
Palm	Vx	1
Palm	VIIx	1
Palm	Tungsten T	3
Palm	TX	5
Palm	Tungsten W	2
Palm	Tungsten C	4
Palm	Tungsten E	3
Palm	Tungsten E2	5
Palm	Zire	2
Palm	Zire 21	3
Palm	Zire 71	3
Palm	Zire 72	5
Palm	Zire 31	5
Sony	Clie SJ20	2

Models with known problems:  
Palm Tungsten T3

An updated list of known compatible PDA's may also be available at [www.sargentlock.com](http://www.sargentlock.com) or in the ReadMe file located at:

**Start | Programs | SofLink Plus 5 | ReadMe**

If your PDA is not in the known compatible PDA list then there is still a chance that it may work, but there is



no guarantee. You may also use the following PDA descriptions to help you choose the best IR Channel setting:

- IR Channel 1 (infrared) - Older PDA's, such as the Palm IIIxe require this setting
- IR Channel 2 (infrared) - This setting is used for PDA's running Palm OS 4.x or 5.x and the PDA does not have an OMAP logo on the back of the PDA
- IR Channel 3 (infrared) - Select this setting for PDA's that display an 'OMAP' logo on the back of the PDA, see the OMAP logo below.
- IR Channel 4 (infrared) - See the list above for PDA models that use this setting.
- IR Channel 5 (infrared) - See the list above for PDA models that use this setting.
- Emulator - This setting should never be selected



### Comm Speed

Drop-down list allowing selection of the baud rate to communicate to the device. **The default setting is 19200 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.



- The Door Management Screen displays a list of each of the door controllers within the selected 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 in column **C** when SofLink

PDP has new configuration data available to upload to the device. A checkmark gets placed in column **L** when SofLink PDP has received new event log data from the controller that has not yet been returned to the PC via a HotSync.

**NOTE:** Some doors on the PDA may not have new configuration data.

#### Action

The Action list 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. Some actions such as the 'Remove' option should not be performed unless you are asked to do so by a Technical Support representative.

### Communicating with a Door

1. Select the **Imp/Exp** button of the SofLink PDA main screen and point the infrared port of the PDA at the infrared port of the controller as shown in the following diagrams. See the installation manual for further details on the infrared ports of the controllers.



**NOTE:** The optimal distance between the PDA and the controller is approximately 3" to 10". Some PDA's perform better at the shorter range and some perform better at the longer range due to the variations in the infrared lens of the PDA hardware. Longer export and import times will result from putting the PDA either too close or too far away from the infrared receiver of the controller. This extra time is due to retries that may result from communication errors.

2. The PDA application will now prompt you to "Please enter your communications code at the door". The process of unlocking communications is required in order to communicate with the controller.

3. Enter a valid "**Communications Unlock**" user credential 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-\*).
4. If this is the first visit to this door, SofLink PDP prompts you to select the door from the list. 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 as noted in the next step.



5. If you have communicated with this controller hardware before, or you just selected the door from the list in the step above, then SofLink PDP will ask you to verify the door controller you are communicating with.



- SofLink PDP will then query the controller 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, and displays how many events were retrieved from this controller.



- SofLink PDP then 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.

**NOTE:** An export of 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 only a few seconds if only a few changes were made.

- When finished, SofLink PDP displays a **Complete** message (shown above)

## 4.8 Uninstall

### Uninstalling SofLink Plus

**WARNING:** Uninstalling SofLink Plus will result in a loss of all database data that you have created.

To uninstall SofLink Plus you can simply use the "Add or Remove Programs" feature of Windows, and choose the application named **SofLink Plus 5**.

**NOTE:** Any files that you created while using SofLink Plus, such as reports, backups, or other files that were created by the program itself, will not be removed from the hard drive. Those files will need to be removed manually. Only files that were placed onto the hard drive by the installation program will be removed, including the entire database.

### Uninstalling SofLink PDP

The SofLink PDP software is uninstalled using the installation CD that came with the product. When the Autorun.exe program is run, you will see an option labeled "Uninstall SofLink PDP". Simply select that option to remove the PDA associated files from Palm Desktop.

**NOTE:** You will have to manually remove the SofLink PDP PDA application from the PDA itself. Please

refer to the PDA's documentation for instructions on removing applications from the PDA.



## 5 System

### 5.1 System Menu

Standard program functions can be accessed via the System menu.

[System Manager](#)

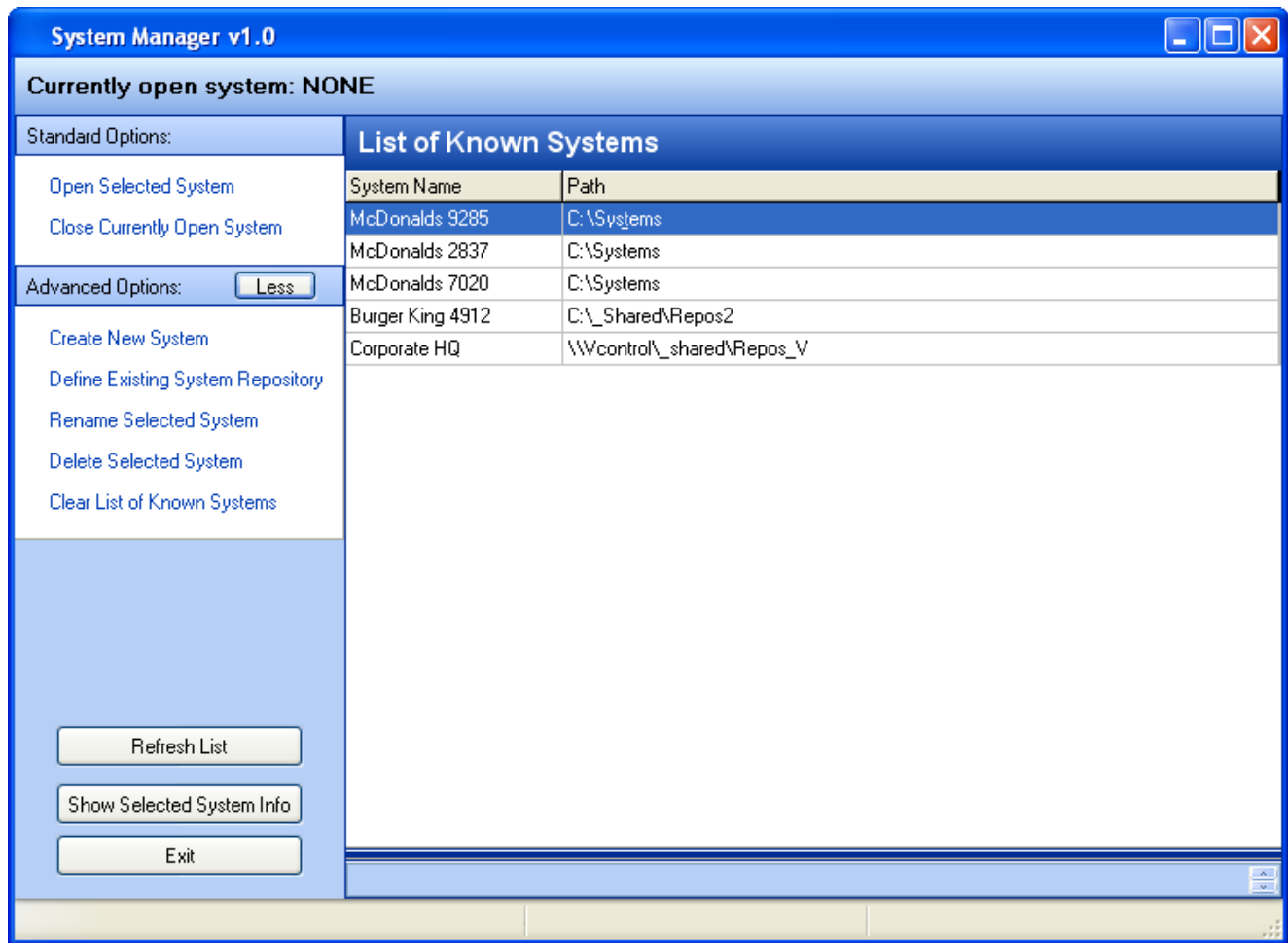
[Login](#)

[Logout](#)

[Change Login Password](#)

[Exit](#)

### 5.2 System Manager



System Manager allows SofLink Plus to manage any number of individual discrete system databases.

System Manager can also allow access to those Systems by additional PC's on your network. The operators of those PC's must have sufficient network access rights to the folders that store the System data.

A "system" consists of a database and files directly associated with that particular database. Each System is data independent of the other "Systems" you have created.

When a system is created it is stored in a folder that you specify. That folder is called a "System Repository". System Repository folders can be created in any network location which the creating PC has access to. Any number of System Repositories can be created, and a System Repository can store any

number of Systems.

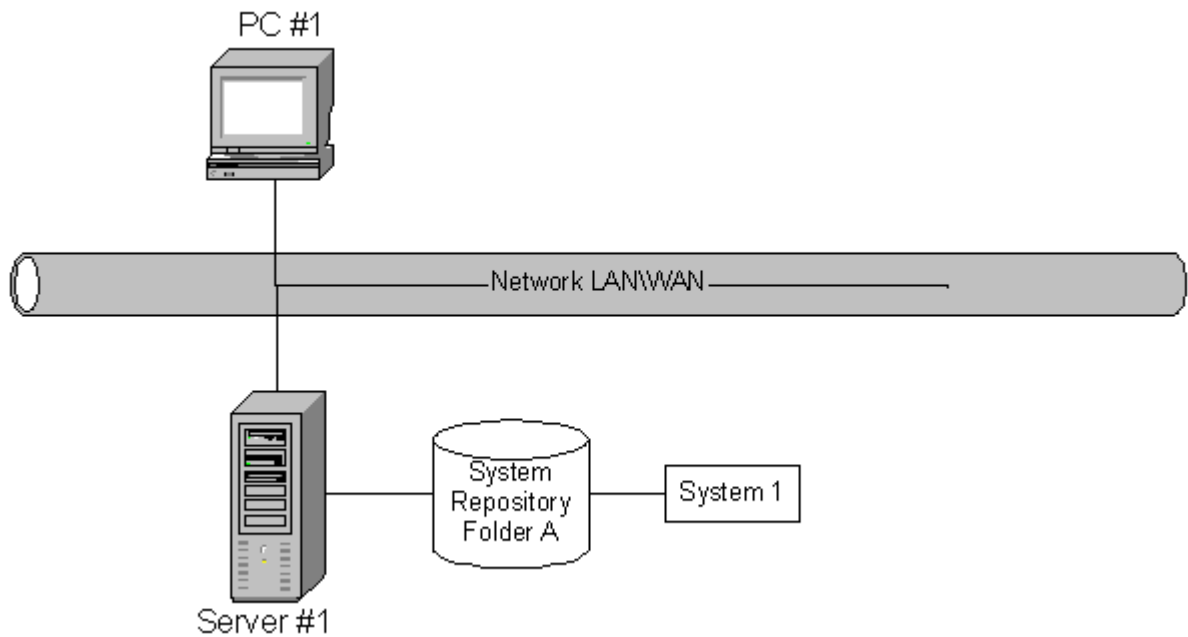
## Applications

### One operator manages one system

System Manager allows a single operator to manage a single System database. This is nothing new and was always the case in prior versions of SofLink Plus. But now the added advantage is that the system dataset can be stored remotely on a server in a folder that is included in automatic backups. That folder is the "System Repository" folder.

**NOTE:** The act of backing up in this scenario is not performed by System Manager or SofLink Plus, but would be performed by the backup program running on your server.

**Application Example:** A single person within a company is responsible for managing the access control system in that company. SofLink Plus and System Manager is installed on that persons PC. The System may be stored on that PC or somewhere else on the network.

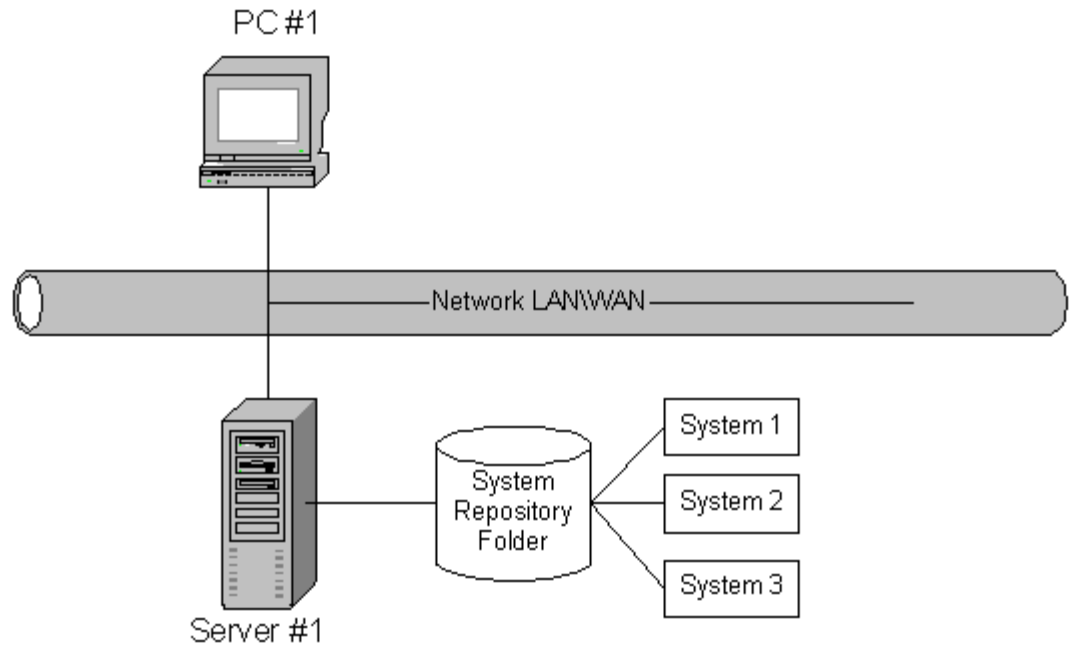


**One Operator Manages One System**

### One operator manages many systems

System Manager allows a single operator to manage multiple discrete system databases, such as those of multiple independent customers. In this scenario, it is likely that all data is stored on the operators PC (or in a folder on a server that only that operator has access to) and this operator can communicate to the access control hardware via modem, network, or other communication type that applies to the hardware. The operator can also visit the hardware and connect to it physically.

**Application Example:** A dealer acts as a central station and manages the databases for several customers. He can either connect to the hardware via modems, PDA's, or network connection, dependent upon which communication types the access control hardware supports.



**One Operator Manages Many Systems**

#### **Many operators manage one system**

System Manager can be used to allow multiple operators on different computers to manage a single database that is stored on the network and is accessible by all of the operators that wish to manage the data. This is helpful if a company has several people responsible for adding, deleting, and editing users within their own department.

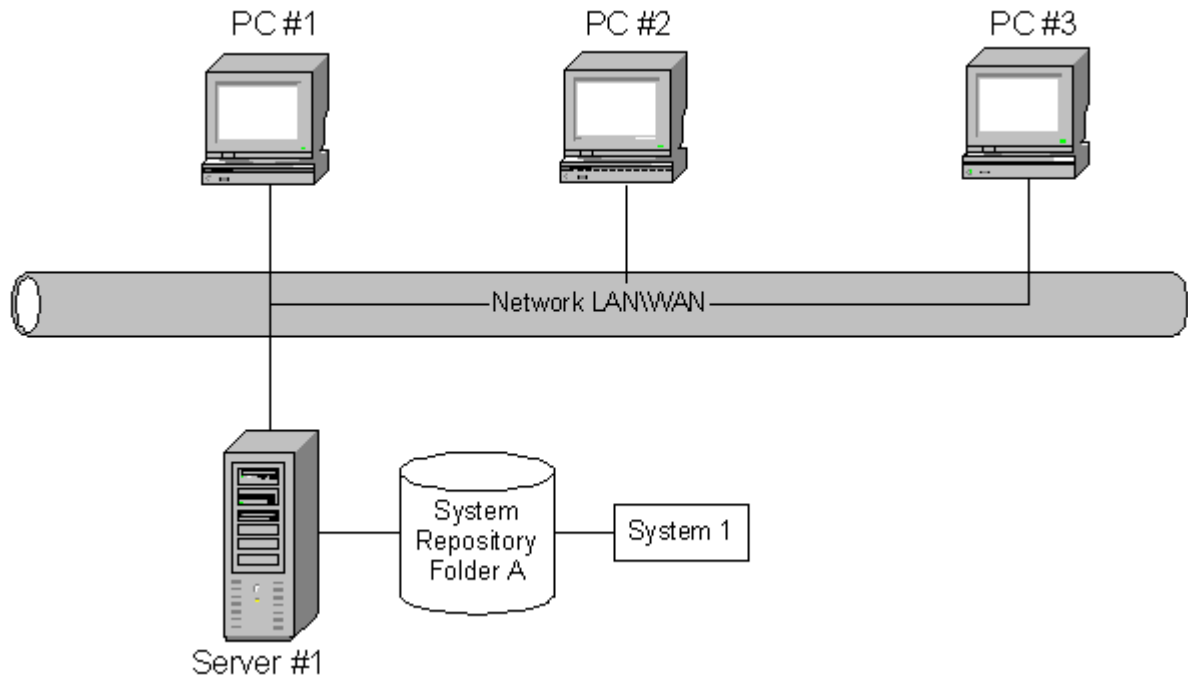
**Application Example:** A company with several departments manages its own system. Each department head is responsible for managing the users in their own department. SofLink Plus and System Manager is installed on each department head's PC. The Network Administrator creates a new folder on a server somewhere on the network and grants each department head access to that new System Repository folder.

System Manager is then run on any of the PC's. The operator then selects "Create New System", at which point the operator will select to create the new system in the new System Repository folder that the network administrator had created.

Each department head can then run System Manager and attempt to open that System dataset stored in the System Repository. After all changes are made and exported to the controllers, the department head will then close the System, at which point the system dataset is sent back to the System Repository folder on the network and is ready for access by another department head.

**NOTE:** If a department head in attempting to open a system that is already in use by another department head, access will be denied. A "Close System Request" can be issued at that point. Please see the section in this topic labeled "Open Selected System (while that system is already opened on another PC)" for more details.





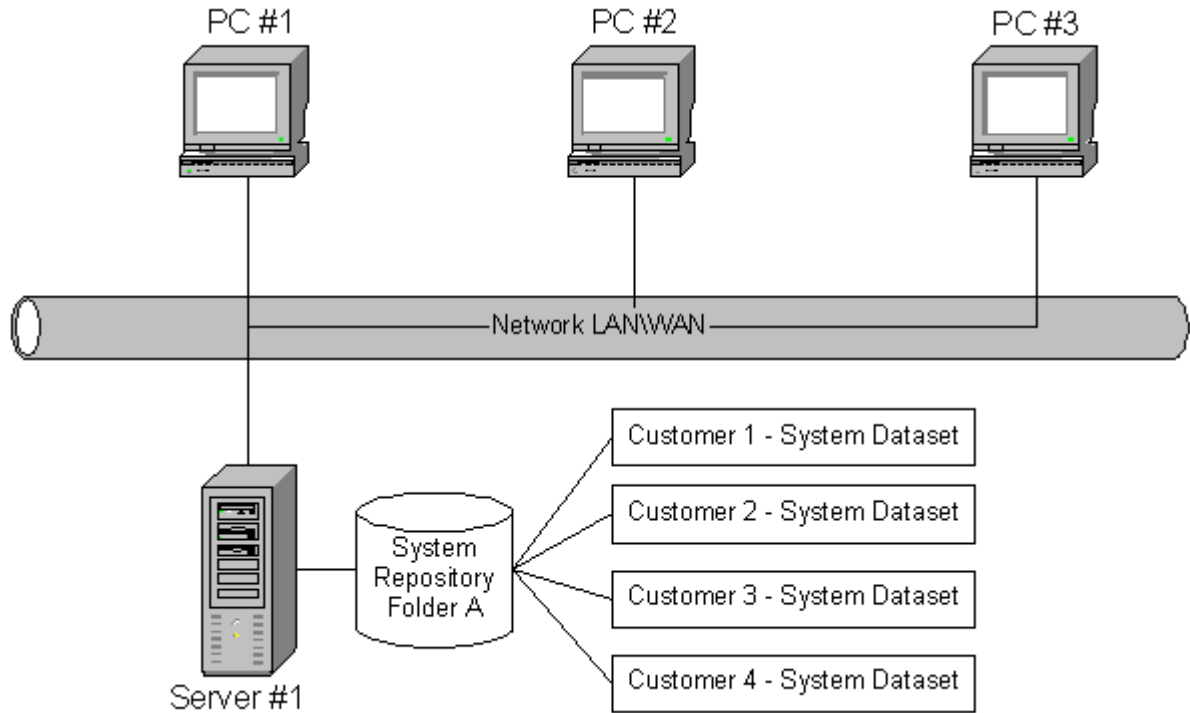
### Many Operators Manage One System

#### Many operators manage many systems

System Manager was designed to be used to maintain multiple individual databases across a network, by multiple operators.

**Application Example #1 - Central Station:** You're a dealer who manages the access control systems for several of your "end user" customers, and you have multiple employees at your central station who are allowed to modify the data of those customers.

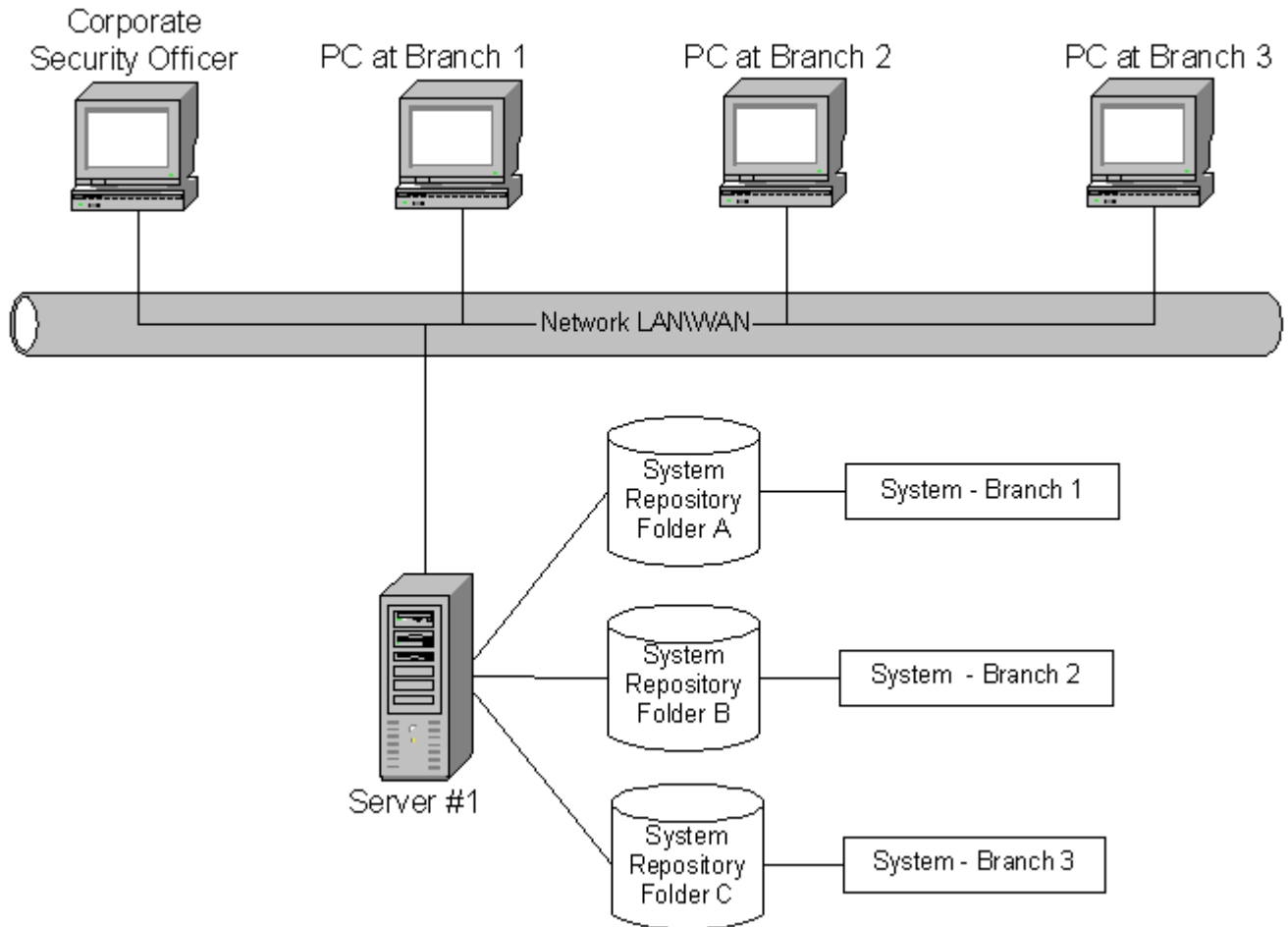
SofLink Plus and System Manager is installed on each employee PC that may be managing a customer system. System Manager is run on any of those PC's, and is used to create a new System for each customer. Those systems can be stored in a folder anywhere on the network, as long as that folder is accessible to the other employees that may also be managing that customer's system. All systems can be stored in one System Repository folder or each system can be stored in it's own System Repository folder, thereby allowing it to be completely separate. This could be helpful if you do not want to give certain employees access to a particular system. You could simply have the network administrator create a folder on the network that is inaccessible to a particular employee, and then store that customers system in that folder.



**Many Operators Manage Many Systems - Central Station Example**

**Application Example #2 - Multiple Bank Branches:** A Corporate Security Officer wants to be able to manage the access control for all branches of a bank, and also allow each Branch Manager to manage the data of their own branch. All bank branches are on the corporate network.

The Corporate Security Officer would instruct the Network Administrator to create a separate System Repository folder on a server for each of the bank branches (as shown in Server #1 in the following diagram). The Network Administrator will also set the network access privileges of each folder to only allow the Corporate Security Officer and the Branch Manager of that particular branch. System Manager is then used to create a system in each of those System Repository folders.



**Many Operators Manage Many Systems - Multiple Bank Branches Example**

## Terms

### System Manager

System Manager is a program that is responsible for accessing the System Repository and loading System datasets onto the local PC. System Manager also sends that same dataset back to the System Repository.

### System Repository (aka Repository, or Repository folder)

A 'System Repository' is a folder that can store any number of System Datasets. Any number of System Repository folders can be created based upon your security needs. All systems stored in that repository can be accessed by any installation of System Manager that has network privileges to see that particular System Repository folder.

### System Dataset (aka Dataset or System)

A 'System Dataset' is a compressed zip file that stores all the data that is related to that particular System, currently including (but not limited to) the complete contents of the following folders: Archive, Backup, Database, Gateway, Maps, PDAFiles, Print, and ReportDB.

### Operator

Person who is using the SofLink Plus and System Manager software.

## Overview of System Manager

### Security

System Manager does not restrict access to any of the System Repository folders in any way. Access to the repository folders is based on the network privileges you were given by the network administrator.

A System Repository may be located either on the local PC or in any folder on the network. The security of the stored data is only as good as the security of folder that stores the data. System Manager uses the security infrastructure of the PC as set up by the Network Administrator.

The software will use whatever means of network connectivity are provided by the client PC. (This may be a shared folder, network folder, mapped folder, VPN, etc..).

### Launching and Closing System Manager

System Manager can be seen running in the System Tray (typically in the lower right corner of your screen, see below)



System Manager is automatically launched when SofLink Plus is launched, but System Manager is not automatically closed when SofLink Plus is closed. This allows System Manager to be able to process messages from other installations of System Manager running on other PC's. One type of request could be that the other PC needs to access to the dataset that is open on your PC, and that other PC will perform a 'Request to Close'.

### Basics of Operation

When a System is opened, System Manager program will actually make a local copy of the data for use during program operation and will store the data back to the System Repository folder upon selecting to close the system. This copy is also created even if the data repository folder is on the local PC.

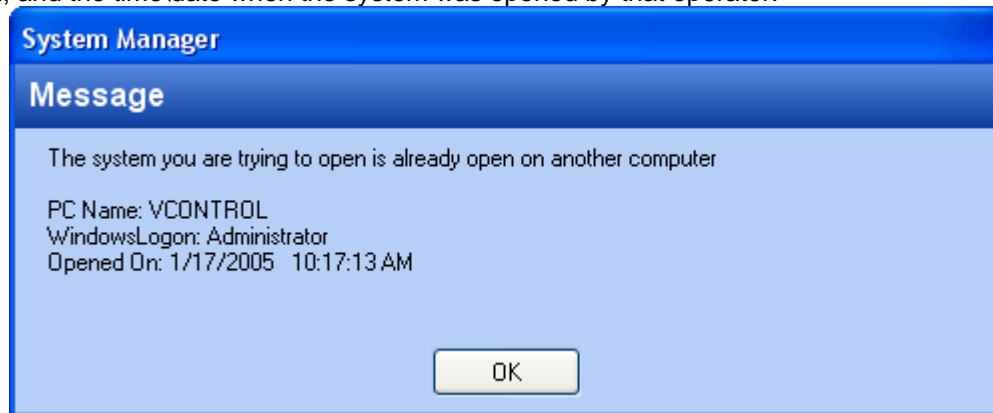
## Standard Options

### Open Selected System (while the system is not opened on another PC)

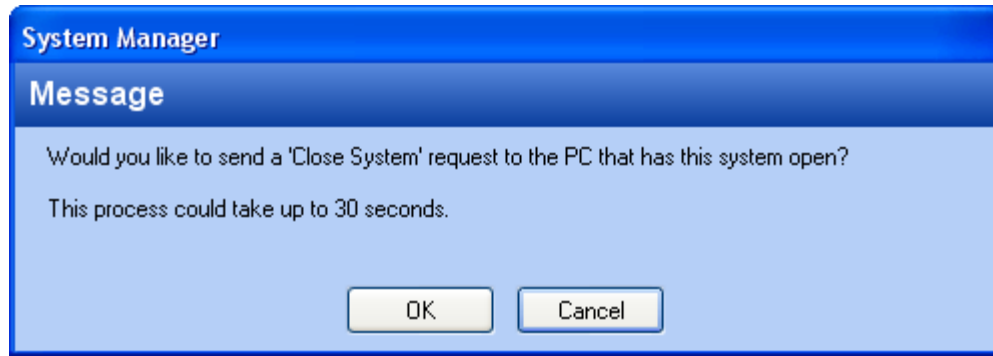
This option is used to open the system that is selected in the list. If this option is selected and a different system is already open, then the open system will be closed first, and then the selected system will be opened.

### Open Selected System (while that system is already opened on another PC)

- If a system is already open when you select this option, then that system will be closed prior to opening the new system.
- After selecting the "Open" option, System Manager must check to see that the selected system is not currently open on another PC running System Manager. If the system you selected to open is already open on another PC, a message will be displayed showing information relative to the PC that has the system open: the name of the computer, the name of the person logged in when the system was opened, and the time/date when the system was opened by that operator.



Upon selecting OK, you will then be asked if you want to send a "Close System" request to the PC that has that system open. Selecting OK, will start the "Close System" process.

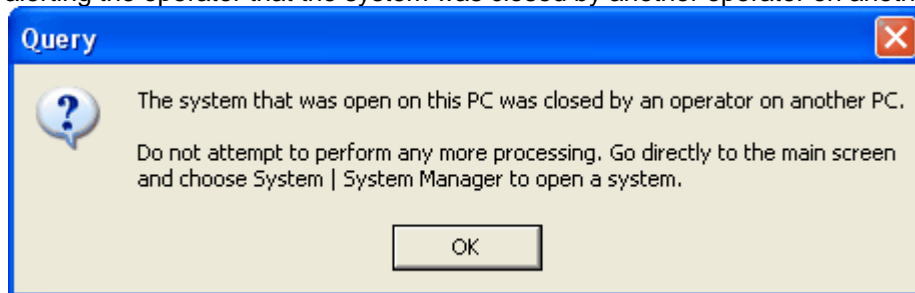


At this time the PC requesting the close will send a "Close Request" and will continuously wait for a "Close Successful" response from the PC that is closing the system dataset.

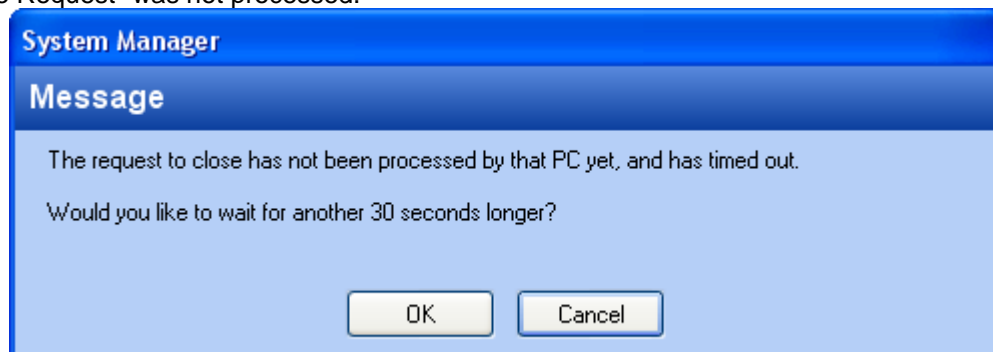
**NOTE:** In order for the close request to be processed by the PC that has the system open, ALL of the following MUST be true:

- the other PC is powered up
- the other PC is logged into Windows properly
- the other PC has System Manager actively running. SofLink Plus does not need to be running, just System Manager. If System Manager is not running, then run SofLink Plus (if it is not already running) and select System | System Manager from the main menu of SofLink Plus.
- the System Manager application running on the other PC must be in the typical idle state, and not be in use by the operator, and must not have any messages displayed that require a response from an operator.

Assuming all of the requirements are met, then the other PC will typically see the close request. The "Close Request" will typically be processed by the other PC without any operator intervention required. During the automatic closing of the system on the other PC, any operator logged into SofLink Plus will be logged out and the system dataset will be closed normally. If SofLink Plus was running at the time, then a message will be displayed alerting the operator that the system was closed by another operator on another PC.

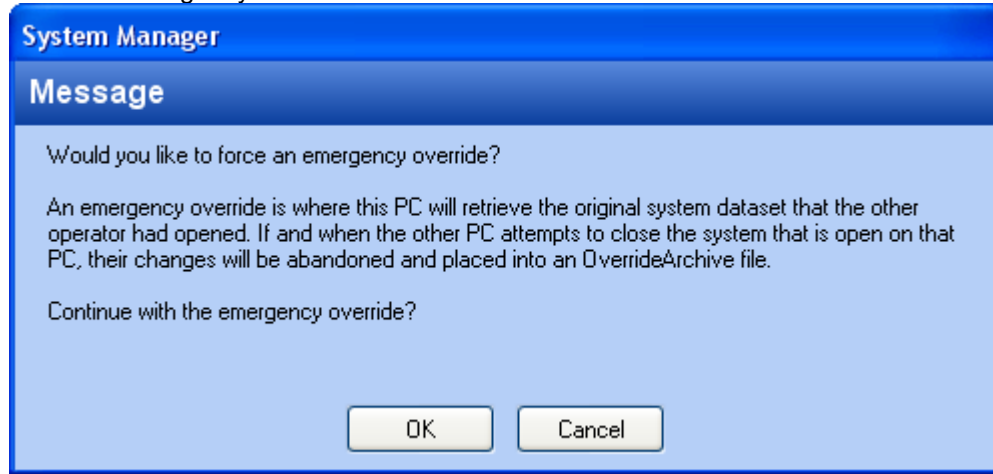


If any of the requirements are not met and the other PC does not respond with a close successful within the predetermined amount of time (default is 30 seconds), then a message will be displayed alerting you that the "Close Request" was not processed.



At this point you have 2 options:

- Select OK and wait another 30 seconds for the close successful response from the other PC. You may want to do this if you knew you were having network connection problems, or you contacted the owner of the other PC and had that operator put the PC into the required state as noted above.
- Select Cancel, which will cancel any further waiting, but will then display another message asking if you want to force an "emergency override".



An "emergency override" is NOT recommended and should only be used in rare cases. The reason an emergency override is not recommended is because any changes made to the dataset while that dataset was open on the other PC will be discarded when the other PC gets around to closing the dataset.

If an "emergency override" is executed, then the PC requesting the close simply opens the copy of the system dataset that is stored in the System Repository. That copy of the dataset will not contain any of the modifications made by the other operator who had it open. After the dataset is opened on your PC, a message will be displayed to the other operator that will inform the other operator that their data was overridden and that the dataset they currently have open will be abandoned when that system is eventually closed.

**NOTE:** In all cases, any changes made to a System dataset while it was open on the other PC will need to be reentered if that System was overridden.

An "emergency override" is known to be helpful in the following situations:

- The other PC, that had the system dataset you need, has crashed and the data on the hard drive can't be recovered. The override will simply cause System Manager to abandon the dataset that was open by that operator, and allow you to open the last saved dataset.
- You need to make a critical change to the system such as deleting a disgruntled employee and you need to delete that user and get the data exported to the controllers immediately.

### Close Currently Open System

This option takes all of the data associated with the currently open system, compresses it into a single file and sends that "dataset" back to the System Repository from which that dataset was opened from.

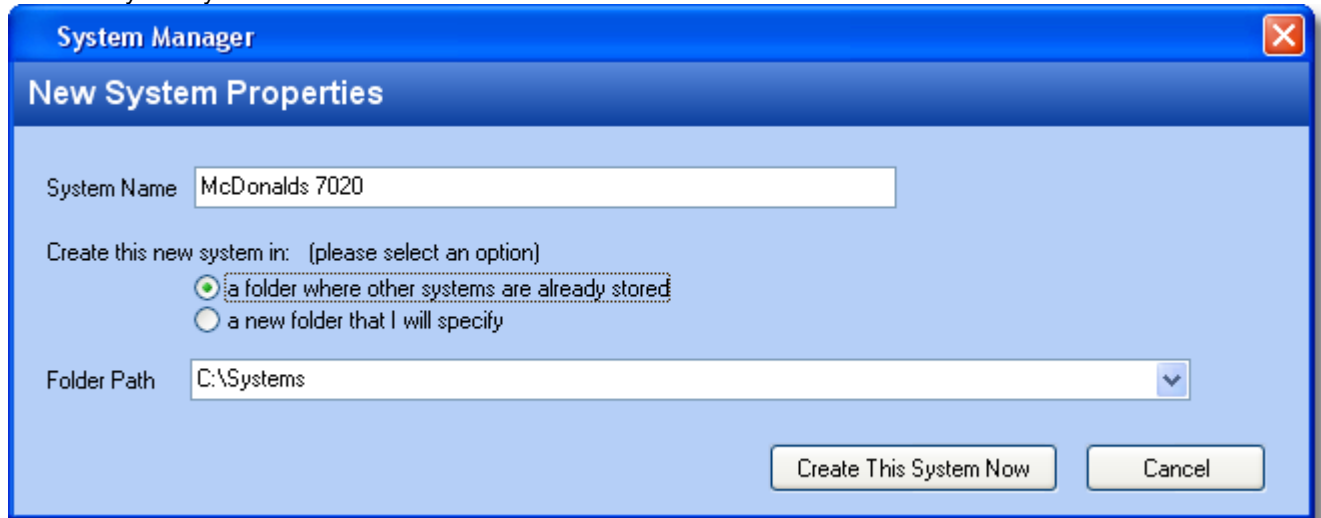
## Advanced Options

### Create New System

Creating a system is the process of creating a new discrete dataset in a folder that you specify. The system name is typically the name of a company, or a subset of a company. The folder that you specify may be either an existing System Repository folder or the operator may choose to specify a new folder that will be considered an additional System Repository folder.

**NOTE:** If a new system is created, and an existing System Repository folder is selected, then that new system will become available to other installations of System Manager that already have access to the System Repository folder you created the new system in. Choosing to use the same System Repository folder to store all systems may be helpful if every installation of System Manager on your network is to have

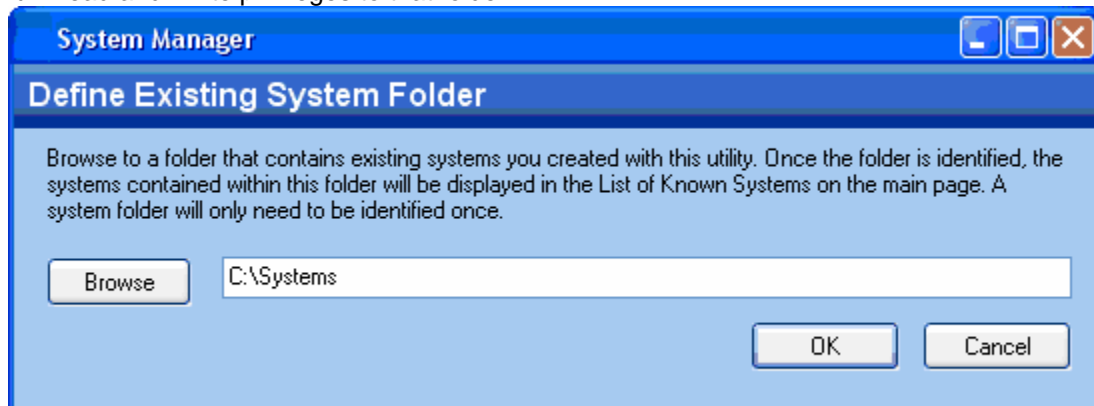
access to all systems that are created. If all installations of System Manager are not going to have access to all the systems you create, then it is recommended that you create a separate System Repository folder for each system you create.



### Locate / Import Repository

This is the process of using a particular installation of System Manager to navigate to a "System Repository" folder that is currently not "known" by this particular PC. Once you have browsed to that folder, select OK. Now all Systems stored in that System Repository folder will be displayed in your list of known systems.

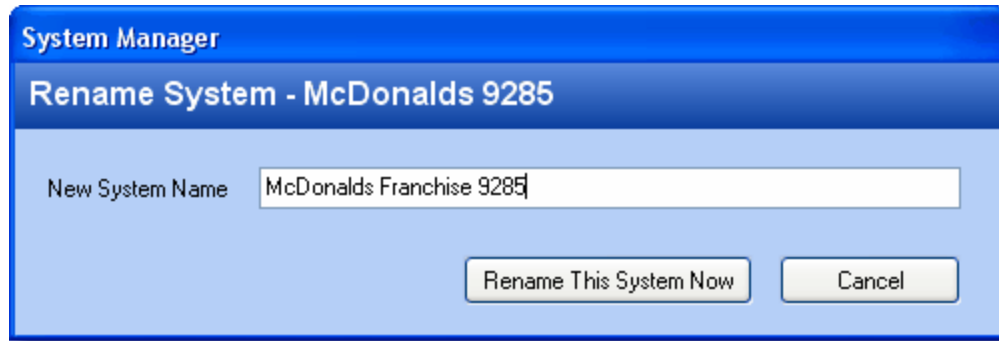
**NOTE:** In order to properly access a System Repository folder your Network Administrator must have given you full Read and Write privileges to that folder.



### Rename Selected System

This option changes the name of the selected system. Once a system is renamed, the next time an operator runs System Manager the new system name will be displayed in the list of known systems.

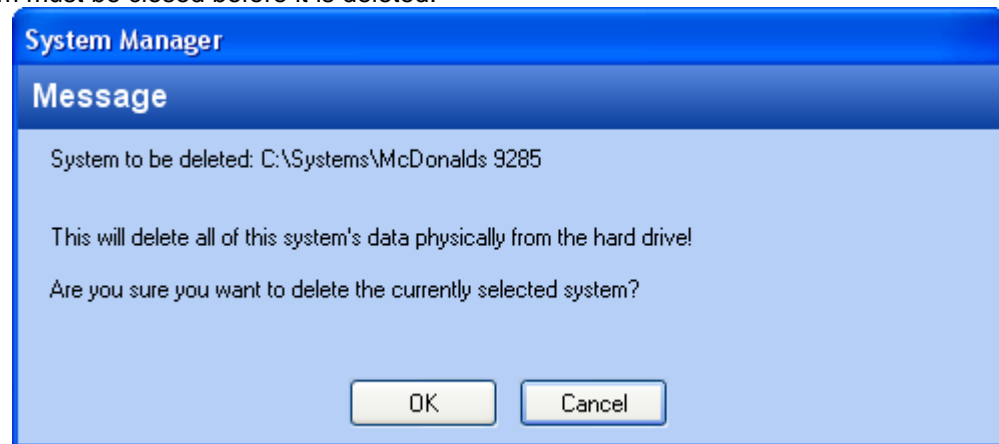
A system should be closed before it is renamed.



#### Delete Selected System

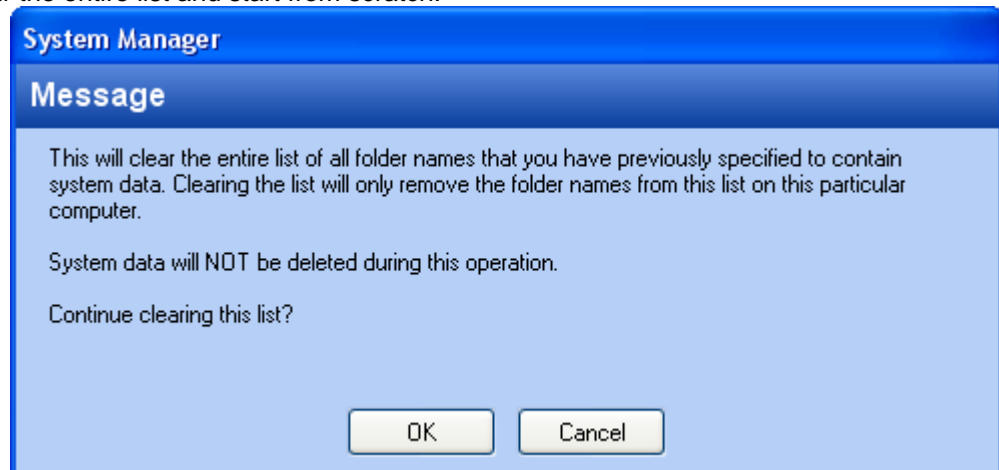
**WARNING: This option will result in the permanent loss of the selected system data.** This option will completely remove all data associated with the selected system.

A system must be closed before it is deleted.



#### Clear List of Known Systems

This option clears the list of known System Repository folders which are stored locally on this particular PC. This will in turn remove all system names from the list of known systems. This is helpful if you have previously browsed to a System Repository that you no longer want to see the contents of, then this option will clear the entire list and start from scratch.



#### Refresh List

Forces an update of the "Known Systems List". This option is rarely required.

#### Show Selected System Info



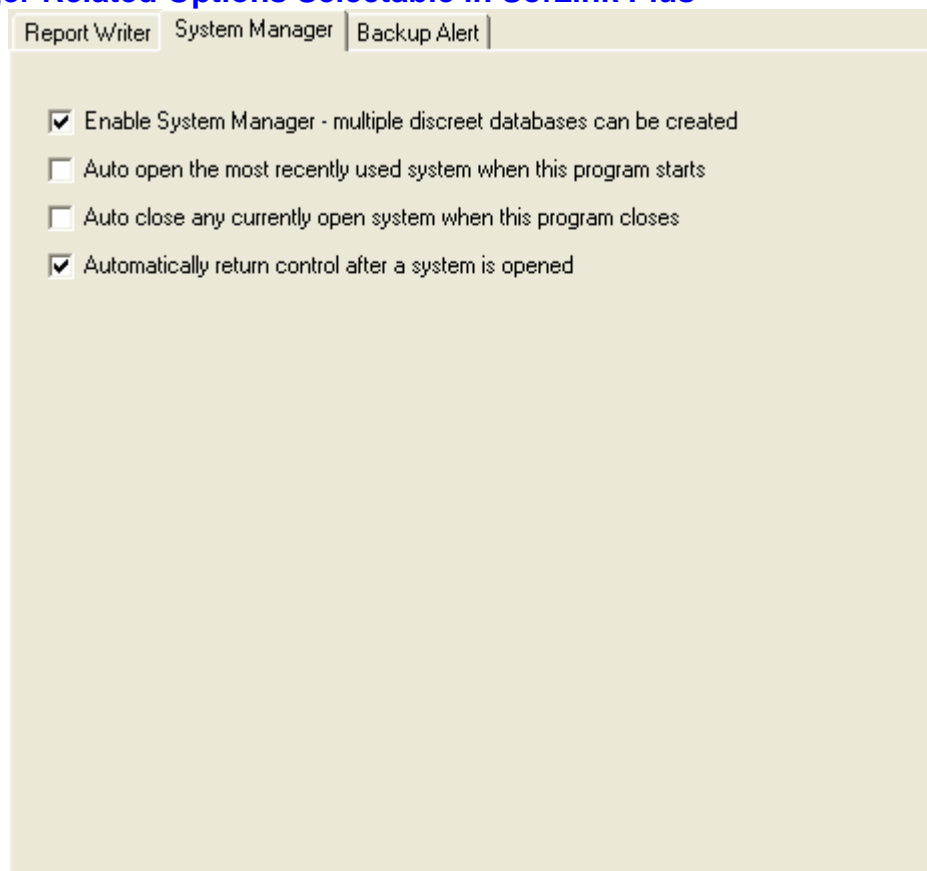
This option will collect some information on the selected System and display that information in the status messages below the system list. Status message are not displayed by default, but you can simply resize the status message section of System Manager by dragging the resize splitter at the bottom of the Known System list.

### Exit

Selecting Exit will not close the System Manager program, but will simply minimize the program to the Windows System tray (typically in the lower right corner of the screen). If you want to completely close System Manager then you must right click on the System Manager program icon in the system tray (see below) and select 'Exit System Manager'.



## System Manager Related Options Selectable in SofLink Plus



### Enable System Manager - multiple discrete databases can be created

When enabled, this option will enable the System Manager feature. If you are not using any of the features of System Manager as described in this section, you can disable this option. Disabling this option will remove System Manager from the System menu of SofLink Plus and any opening and closing of system datasets from a system repository folder will cease.

Disabling System Manager will cause SofLink Plus to handle a database as it has in previous versions of SofLink Plus, whereas only one system exists and the system is always open.

**NOTE:** Disabling System Manager is recommended only if the following are true:

- you have only one system
- the dataset to reside on the local PC

- the only operator that is going access the data is an operator of that particular PC

#### Auto open the most recently used system when the program starts

**NOTE:** This option requires that the 'Enable System Manager' option above is enabled.

Enabling this option will cause System Manager to automatically open the System that was most recently used, without the need to intentionally run System Manager. The opening of that system will automatically occur when SofLink Plus is launched. Enabling this option is helpful if you are typically using SofLink Plus to edit the same System over and over again.

Enabling this option is helpful if you have installed SofLink Plus on and operators PC and you feel that operator would had no need to know about or reason to deal with System Manager. If this is your reason for enabling this option then you will also want to enable the 'Auto Close' option below.

#### Auto close any currently open system when this program closes

**NOTE:** This option requires that the Enable System Manager option is enabled.

Enabling this option will cause System Manager to automatically close the currently open system when the SofLink Plus program is closed. This is useful if you have multiple operators that access a particular database, because it increases the chances that when an operator is done exporting changes and closes SofLink Plus that the System Dataset will be sent back to the System Repository and made available to other operators on other PC's running System Manager.

#### Automatically return control after a system is open

**NOTE:** This option requires that the Enable System Manager option is enabled.

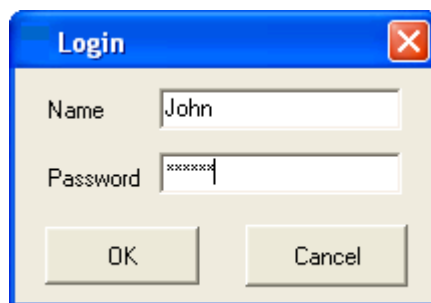
Enabling this option will cause System Manager to give control back to SofLink Plus directly after a system is loaded, without giving a 'System opened successfully' message or requiring that you close System Manager. Once you have an understanding of how System Manager works, enabling this option can help speed up the System Open process a little.

## 5.3 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.

**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 select **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.

## 5.4 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 transaction logs can occur.

In a PDA connected system, when a HotSync is performed, transaction logs are retrieved from the PDA and placed onto the PC, but are not sent to the SofLink Plus database. By using the scheduled Log Import feature, you can have those transaction log events imported into the database on a schedule. This is helpful if you want to have someone responsible for using the PDA to retrieve transaction logs from the door controllers, but not give them access to the SofLink Plus program itself. Now that person can simply visit each door controller and then HotSync the PDA afterwards, the log import to the database will then be performed automatically.

## 5.5 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](#).

## 5.6 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 have occurred but these changes have not been exported to those door controllers yet.

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 log out of but not exit SofLink Plus.

## 6 Database

### 6.1 Database Menu

All data types can be accessed via the Database menu system.

[Operators](#)

[Sites](#)

[Time Zones](#)

[Doors](#)

[Access Levels](#)

[Users](#)

[Holidays](#)

### 6.2 Operators

#### 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. Select the **Add** button on the Operators screen.

Access	Feature Description
	Login - Enables you to use this program
	Logout - This program remains active, but nobody can use the program until the next login
Enabled	Change Password - Enables you to change the password of currently logged operator
	Exit - Closes this program immediately
Full	Timezones - Manages timezones table
Full	Sites - Manages Sites table
Full	Doors - Manages Doors table
Full	Access Levels - Manages user rights to access doors
Full	Users - Manages Users table
Full	Holidays - Manages Holidays table
Full	Operators - Manages rights to use this program
Enabled	Import Log - Gets transaction logs from doors
Enabled	Import Log From All Sites - Gets transaction logs from all doors at all sites

2. Enter the information in the operator detail fields as required.
3. Select **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.

**Cancel**

Discards all changes to this operator and returns you to the previous screen.

## 6.3 Sites

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

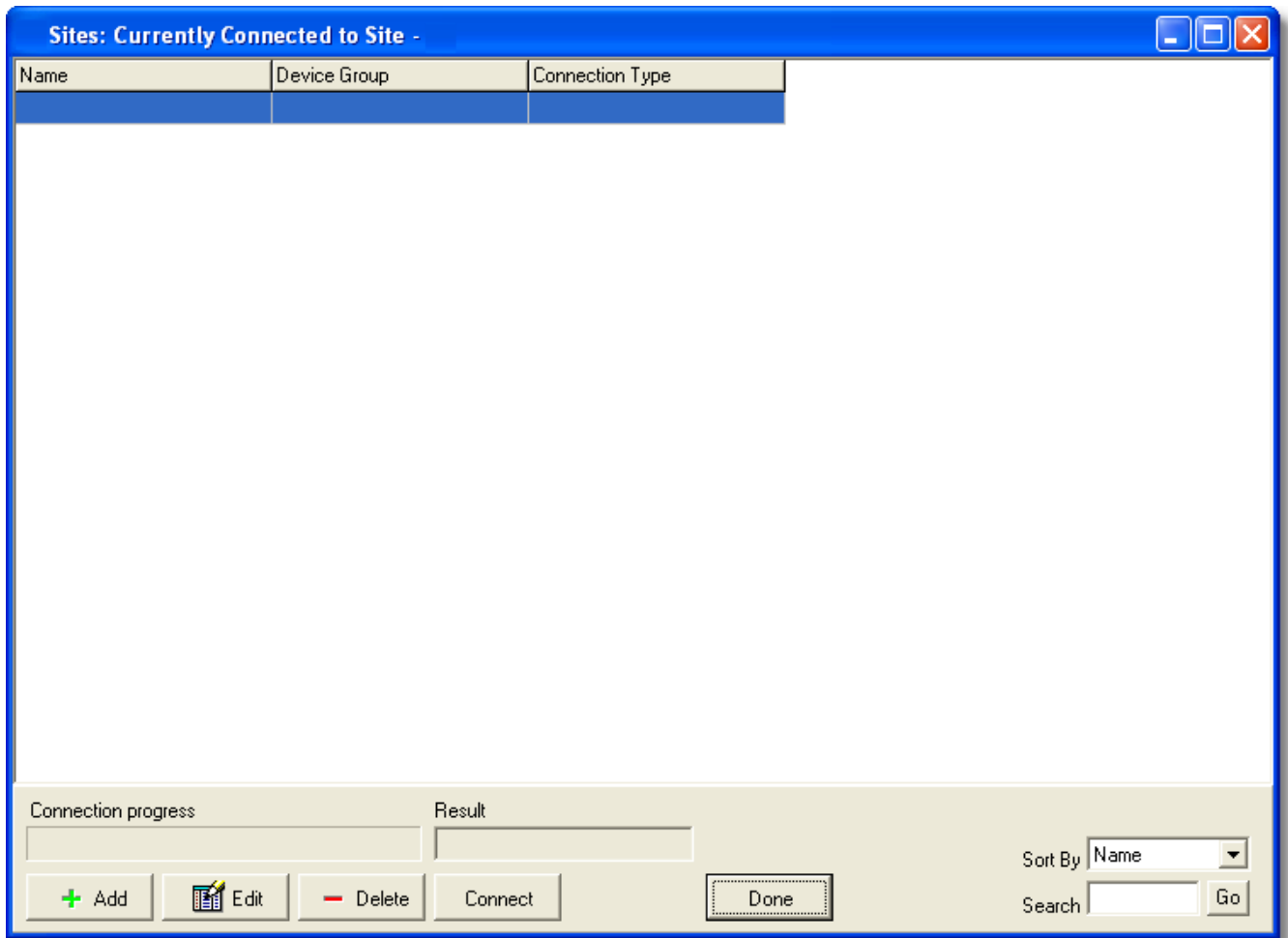
The following table shows which connection types are supported by which controllers.

	<a href="#">PDA</a>
Profile Series v.G1™	X
Profile Series v.G1.5™	X
4293 Wall Prox	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. Select **Database | Sites** and the Site directory displays.



2. Select the **Add** button on the Sites screen. The Site edit screen displays.

The screenshot shows a software dialog box titled "Site" with a blue header and a close button (X) in the top right corner. The dialog is divided into two tabs: "Common Parameters" and "Assigned Doors". The "Assigned Doors" tab is active. It contains three input fields: "Name" (a text box), "Device Group" (a dropdown menu), and "Connection type" (a dropdown menu). Below these fields is a section labeled "Device group members" with an empty list box. At the bottom right of the dialog are two buttons: "Save" (with a green checkmark icon) and "Cancel" (with a red X icon).

3. Enter the **Name**.
4. Select the **Device Group** that contains the controller type to be used in this site. Only one "Device Group" may be chosen.
5. Select the **Connection Type** that is going to be used to connect to the controllers of this site.
6. Select **Save** to save the information to the database.

### Field/Button Description (Site Directory)

#### 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, coexisting group, connection type).

#### Connection progress

Shows the connection progress while attempting to connect to this site.

#### 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 'communications path' of the highlighted site. The label of this button changes to 'Disconnect' after a successful connection.

Connecting to a site is the software's process of deciding which method is used when communicating with

a particular controller type, and then performing all communications initializations for that communication method.

Each individual site must be 'connected to' before communicating with the door controllers of that site, unless you use the 'Export To All Doors in All Sites' option or the 'Import Logs From All Doors in All Sites' option, both of which will auto-connect to each site, one after another, and then perform the requested action.

**Done**

Closes the Site directory and goes back to the main screen.

**Field/Button Description (Site Add/Edit)****Name**

Shows the name of the site.

**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.

**Assigned Doors**

Displays the doors that are currently assigned to this site.

**Save**

Save all edits to this particular site being added/edited.

**Cancel**

Discards all edits of this particular site being added/edited and displays the site directory.

### 6.3.1 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 v.G1™, Profile Series v.G1.5™ or 4293 Wall Prox controllers. There are no additional settings to define for this connection type.

See [PDA Software](#) for more details on using the PDA software.

## 6.4 TimeZones

*Time Zones* are used for two purposes:



- (1) to specify the days and times when a user's access credentials are valid
- (2) to specify the auto-unlock schedules of the door controllers. The auto-unlock settings are established in the [door settings](#) for each door controller.

*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 sort criterion for this option. Time Zones can be sorted by Name, Type, Start and Stop.



Timezones												
Name	Type	Start	Stop	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Hol	
24 Hour	Single Day	12:00 AM	11:59 PM	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Hol	
Janitorial Services	Single Day	3:00 PM	7:00 PM		Mon		Wed		Fri			
Shift 1 - Weekdays	Single Day	9:00 AM	7:00 PM		Mon	Tue	Wed	Thu	Fri			
Shift 1 - Weekends	Single Day	9:00 AM	7:00 PM	Sun					Fri	Sat		
Shift 2 - Weekdays	Single Day	3:00 PM	11:00 PM		Mon	Tue	Wed	Thu	Fri			
Shift 2 - Weekends	Single Day	3:00 PM	11:00 PM	Sun					Fri	Sat		
Shift 3 - Weekdays	Midnight-Crossing	11:00 PM	7:00 AM		Mon	Tue	Wed	Thu	Fri			
Shift 3 - Weekends	Midnight-Crossing	11:00 PM	7:00 AM	Sun					Fri	Sat		

Search    
 Sort  

## 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:** 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. 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 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 "Holiday" 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.

### Single-Day Time Zone

The screenshot shows a 'Time zone' dialog box with the following fields and options:

- Name:** Shift 1 - Weekdays
- Start:** 9:00 AM
- Stop:** 7:00 PM
- Type:** Single Day
- Days of Week:**
  - Sunday
  - Monday
  - Tuesday
  - Wednesday
  - Thursday
  - Friday
  - Saturday
  - Holiday
- Buttons:** Save (with a green checkmark icon) and Cancel (with a red X icon).

#### Midnight-Crossing Time Zone

The screenshot shows a 'Time zone' dialog box with the following fields and options:

- Name:** Shift 3 - Weekdays
- Start:** 11:00 PM
- Stop:** 7:00 AM
- Type:** Midnight-Crossing
- Days of Week:**
  - Sunday
  - Monday
  - Tuesday
  - Wednesday
  - Thursday
  - Friday
  - Saturday
  - Holiday
- Buttons:** Save (with a green checkmark icon) and Cancel (with a red X icon).

### Adding a Time Zone

1. Select 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 select **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 select 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 select 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. Select **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 select the **Binocular** button or press the **<Enter>** key.

## 6.5 Doors

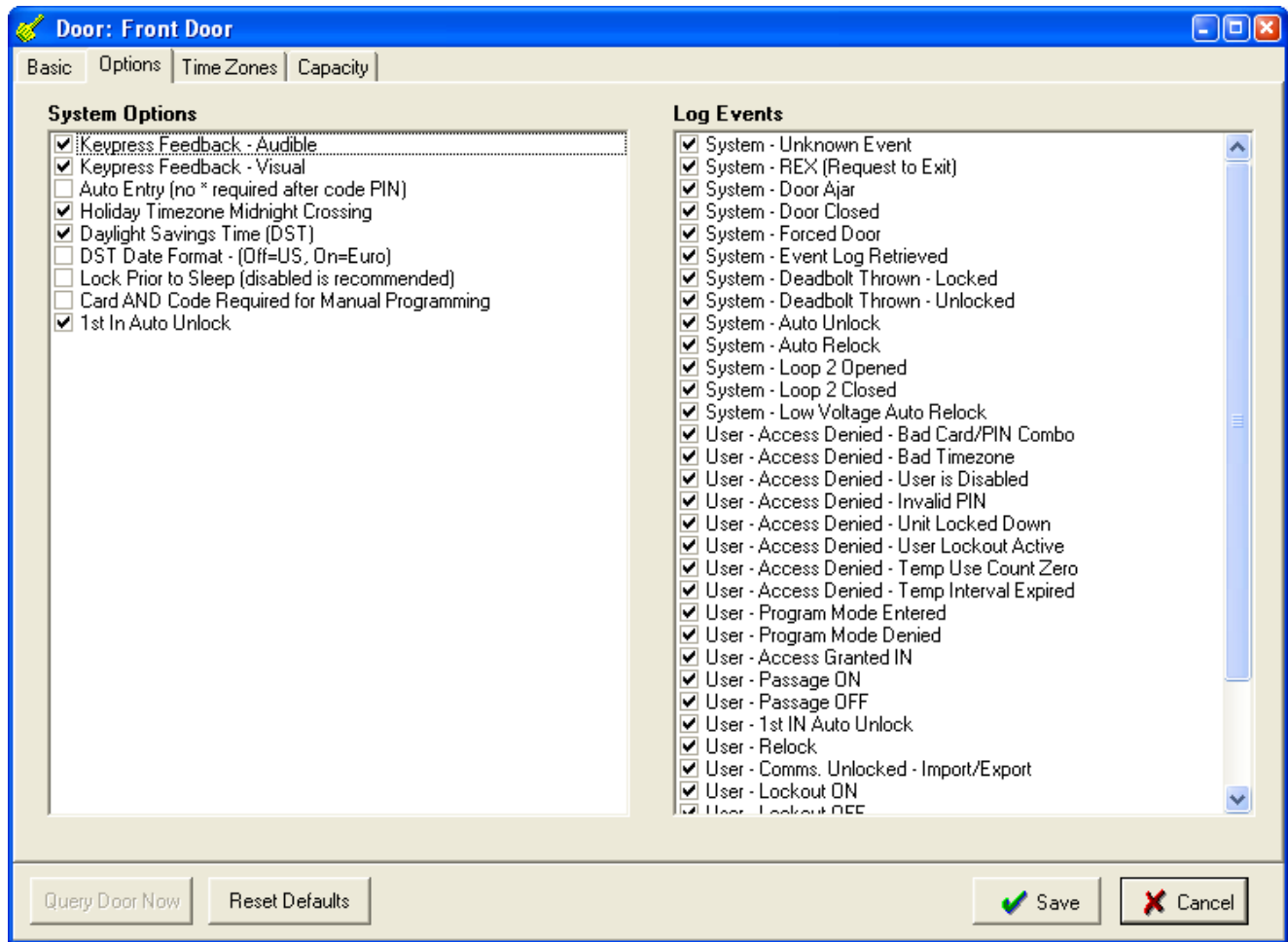
A *door* is defined as any entry point (doors with electrical or magnetic lock, turnstile, rising barrier, or motorized gate) controlled by a supported Controller. The Doors database stores detailed information about door controller setup parameters. The SofLink Plus program can export/import to all 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. Select the **Add** button on the Door screen. The Door screen displays.

Parameter	Value
Lock Timer - Standard Users (1-255 sec)	5
Forced Door Timer (0-990 sec)	10
Door Ajar Timer (1-990 sec)	30
Error Lockout Count (1-50 errors)	3
Error Lockout Duration (1-255 sec)	10
Audio Alerts - press F1 for options	0
Lock Timer - Extended Users (1-255 sec)	10
Auto Entry Count (1-6 digits)	4

2. Enter the name for the door controller you are adding.
3. Select the Site this door is being added to.
4. Select the Controller Type.
5. Specify the Controller Address (if required by the selected controller type). NOTE: PDA connected controllers don't ask you to specify a Controller Address.
6. Modify any of the System Parameters. Parameters are typically timer values.
7. Select the Options tab and modify any of the Options as required. Options are typically features that can be either enabled or disabled.



8. Disable any of the Log Events from being recorded. Clearing a checkbox next to a particular event means that event will not be recorded in the controller when that event occurs. This can be helpful if you find that a particular event is occurring too often and is filling up the transaction log buffer, is therefore and causing other important events to be discarded, since the buffer is first-in, first-out. Common events that are typically disabled for this purpose are: Access Denied and Request to Exit.
9. Select the Time Zones tab to view the time zones assigned to the door you are adding. Available Time Zones are listed on the left. Selecting one of these displays the details at the bottom of the screen. Selecting the right arrow or double-clicking the Time Zone on the left, causes this Time Zone to move to the right side which means this Time Zone is assigned to this controller. Up to eight (8) Time Zones can be selected for any one door controller. Placing a check mark into the checkbox of a selected Time Zone makes that Time Zone an auto-unlock Time Zone.

The screenshot shows the 'Door' configuration window with the 'Time Zones' tab selected. The window is divided into several sections:

- Available Time Zones:** A list box containing 'Shift 3'. Below it are 'Select' and 'Deselect' buttons with arrows.
- Selected Time Zones:** A list box with the instruction 'Check a Time Zone to make it Auto-Unlock'. It contains three unchecked items: '24 Hour', 'Shift 1', and 'Shift 2'.
- Time Zone Info:** A section showing details for the selected time zone:
  - Name: Shift 2
  - Type: Single Day
  - Start: 3:00:00 PM
  - Stop: 11:00:00 PM
- Days of the Week:** A grid of checkboxes for each day:
  - Sunday:
  - Monday:
  - Tuesday:
  - Wednesday:
  - Thursday:
  - Friday:
  - Saturday:
  - Holiday:
- Buttons:** 'Query Door Now', 'Reset Defaults', 'Save' (with a green checkmark icon), and 'Cancel' (with a red X icon).

10. Select **Save** to save the information to the doors database, or select **Cancel** to discard all changes and return to the Doors directory.

## 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 common connection type and a common communications protocol.

### Controller Type

Specifies the type of controller you have controlling this door.

### Controller Address

Two-digit number that corresponds to the actual address programmed in this particular door controller.

**NOTE:** The Controller Address field is not visible when a PDA connected controller type is selected, such as the Profile Series v.G1™, Profile Series v.G1.5™ or the 4293 Wall Prox.

## 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.

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

Feature	Profile Series v.G1™	Profile Series v.G1.5™	4293 Wall Prox
Lock Timer	1-255 sec	1-255 sec	1-255 sec
Forced Door Timer	0-990 sec	0-990 sec	0-990 sec
Door Ajar Timer (Propped Door)	1-990 sec	1-990 sec	1-990 sec
Log Event Mask	X	X	X
Error Lockout Count	1-50 incorrect attempts	1-50 incorrect attempts	1-50 incorrect attempts
Error Lockout Duration	1-255 sec	1-255 sec	1-255 sec
Audio Alerts	X	X	
Keypress Feedback -Audible	X	X	X
Keypress Feedback - Visual	X	X	X
First In Auto Unlock	X	X	X
Auto-Entry Count	X	X	X
Daylight Savings Time Auto Adjust	X	X	X
Daylight Savings Time Date Format	X	X	X
Lock Prior To Sleep	X	X	
Card AND Code Programming	X	X	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 credential. Value in seconds.

### Door Ajar Timer (Propped Door)

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\sounder 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 lock 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. Enter one of the following values to set the desired functionality.

0 = Propped Door and Forced Door audio alerts are both disabled

- 1 = Forced Door audio alert is enabled, Propped Door audio alert is disabled
- 2 = Propped Door audio alert is enabled, Forced Door audio alert is disabled
- 3 = Propped Door and Forced Door audio alerts are both 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.

**First 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 \* (asterisk) 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. If a value of 4 is entered, then after 4 digits on the keypad are pressed, the controller will look to see if that 4 digit code is valid. When this option is enabled it is required that all PIN numbers be the same number of digits in length.

**Holiday Timezone Midnight Crossing**

In regards to User functionality, if this option is enabled, then users assigned to a Time Zone that has 11PM to 4AM Monday thru Friday access, will be allowed to access even if a Saturday is specified as a Holiday. If this feature is disabled, then the user assigned to that Time Zone, would not be granted access after 12:00 AM on the Saturday Holiday.

In regards to Auto Unlock Time Zone functionality, with this option enabled, then if an Time Zone that has 11PM to 4AM Monday thru Friday access becomes an active Auto Unlock, then if Saturday is specified as a Holiday, the Auto Unlock will remain active. If the option is disabled, then at 12:00 AM on that Saturday Holiday, the door will automatically relock.

**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.

**Lock Prior to Sleep**

Warning: Enabling this feature will result in a shorter battery life. Enabling this feature will cause the controller to send an 'extra' lock pulse to the lock (if the controller is in a locked state) just before the controller goes to sleep (battery reserve mode). This feature should only be enabled at the request of a Technical Support representative.

**Card AND Code Required for Programming at the Controller**

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

**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 v.G1™	2000
Profile Series v.G1.5™	2000
4293 Wall Prox	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, select 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 you want the door to unlock automatically at this time.

**NOTE:** If you have enabled 'First In Auto-Unlock' for this door, then every Time Zone that is setup as Auto-Unlock will function as a First In Auto Unlock Time Zone. This means that a valid user must enter during that Time Zone before the controller will allow the door to remain unlocked for that specified time zone period. First In Auto Unlock is enabled by default, in order 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 'First In Auto Unlock' in the doors options screen.

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

### 6.5.1 4293 Wall Prox

The 4293 Wall Prox controllers work in conjunction with the SofLink PDP. You can add both Profile Series v.G1™, Profile Series v.G1.5™ and 4293 Wall Prox controllers in the same access control system and on the same Site.

Basic Characteristics: (subject to change, for a full up-to-date list of all 4293 Wall Prox 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
- Hard-wired power
- 1 Lock Relay (Form C), which can be used to control an external locking device such as a mag lock or electric strike
- 1 Auxiliary Relay (Form C), which can be assigned to one of the following functions: Alarm Shunt, Forced Door, or Door Ajar (Propped Door). The changing of this AUX relay output must be done through manual programming at the controllers keypad. See the controllers programming manual for the programming commands.
- Invalid Code Lockout Count
- Invalid Code Lockout Duration
- Daylight Savings Time (DST) Auto Adjust
- Option to require "Card AND Code" to Enter Programming Mode
- First In Auto Unlock
- Prox Antenna can be remoted from the controller, up to 10' away.
- User Types including: Emergency, Extended Unlock (for slower moving people), Lockout, Single-Use, Passage and others.
- Option to use the Local Sounder for Forced Door or Door Ajar (propped door)

### Communicating with a 4293 Wall Prox Controller

Communications with 4293 Wall Prox controllers is the same process as communicating with Profile Series v.G1™ and Profile Series v.G1.5™ controllers.

1. You will select the Site from the Site directory, then select **Connect**,
2. Choose **Communication | Export To Doors**, and choose the doors you want to send data to. If you see that some doors are already check marked, this means that data (either user settings or door settings) was added or modified in the program, that affected that door. If you want to export to all door controllers in all sites then select the 'Export to All Doors in All Sites' option from the Communications menu or select the 'Export Data to Controllers' buttons on the main screen toolbar.
3. After exporting, it is necessary to launch HotSync Manager and perform a HotSync with the PDA.
4. You then visit each controller with the PDA running SofLink PDP and communicate with the controller.
5. Enter a 'Communications Unlock' credential on the controller.
6. In the SofLink PDP program on the PDA, select the button labeled "Imp/Exp". During this time you will send the new data to the controller and also retrieve any new transaction events that were stored in the controller.
7. Once all doors are visited, you will then connect the PDA to PC and perform a final HotSync, at which time all Transaction event data will be transferred to the PC.
8. You will now launch SofLink Plus and choose **Communications | Import Log from Doors**

### 6.5.2 Profile Series v.G1™

The Profile Series v.G1™ controllers work in conjunction with the SofLink PDP. You can add Profile Series v.G1™, Profile Series v.G1.5™ and 4293 Wall Prox controllers to the same Site.

Basic Characteristics: (for a full up-to-date list of all Profile Series v.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
- Auto Unlock as well as First In Auto Unlock
- User Types including: Emergency, Extended Unlock (for slower moving people), Lockout, Single-Use, Panic, Passage and others.

### 6.5.3 Profile Series v.G1.5™

The Profile Series v.G1.5™ controllers work in conjunction with the SofLink PDP. You can add Profile Series v.G1™, Profile Series v.G1.5™ and 4293 Wall Prox controllers to the same Site.

Basic Characteristics: (for a full up-to-date list of all Profile Series v.G1.5™ 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
- Auto Unlock as well as First In Auto Unlock
- User Types including: Emergency, Extended Unlock (for slower moving people), Lockout, Single-Use, Panic, Passage and others.

## 6.6 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 access credentials 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 presents a valid credential to that controller. Access levels defines *where* and *when* a users' users credential 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 Level Detail**

Name:

**1.** First choose a site

Site Name
Building 1
Building 2

**2.** Then select a door and setup User Type and Access By

Door Name	Type	Access Condition
Electrical 1	Standard Access	Code OR Card
Electrical 2	Standard Access	Code OR Card
Equipment Closet	Standard Access	Code OR Card
Foyer	Standard Access	Code OR Card
Front Door	Standard Access	Code OR Card
Lobby	Standard Access	Code AND Card

**3.** Finally, make Time Zone selections for that door

Selected	Timezone Name	Start	Stop	Days
<input checked="" type="checkbox"/>	24 Hour	12:00:00 AM	11:59:00 PM	Sun Mon Tue Wed Thu Fri Sat Hol

Notify me when I attempt to add users to this particular Access Level

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:** This section 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.

### Adding an Access Level

1. Select the **Add** button on the Access Levels screen. The Access Level Detail screen displays.
2. Enter the **Name** for the new access level.
3. Select one of the available **sites** to display the available doors at the selected site.
4. Select one of the available **doors** at the selected site to which you wish to provide access.
5. Expand the **User Type** drop down list to display the user type options, and then select the user type that you want to assign to a user of this particular access level that is granted access to this particular door. User Types are explained in more detail below.
6. Expand the **Access Condition** drop down list to display the access condition options, and then select which combination of keypad code and access card credential is necessary to perform the action of the user type, such as grant access to this door. Specifying **Card AND Code** requires that both credentials be entered to perform the action of this user type, whereas **Card OR Code** just requires that one or the other be entered.
7. Place a checkmark in the checkbox next to a Time Zone to indicate the times at which users assigned this access level will be granted access to the selected door. Any combination of the Time Zones can be selected for that particular door.
8. Repeat steps 3-7 for each door to which you wish to provide access.
9. Select **Save** to save the data to database. To discard all edits and cancel the addition of an access level, select the **Cancel** button.

## Field/Button Description

### Name

Text box that you use to specify the name of the access level.

### Site Name, Door Name, User Type, Access Condition

Specifies the site name, door name, user type, and the access condition required to access the selected door.

### 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.

### Deny access to the selected door

Selecting this button removes the selected door from this access level's privileges.

### Notify me when I attempt to add users to this particular Access Level

Enabling this option will cause a notification message to appear any time the Operator attempts to add a user and tries to assign that new user to this Access Level. This can be useful if you want to be warned anytime you grant assign a user to an Access Level you have given full access privileges to.

### Save

Saves current door data to Access Levels database.

### Cancel

Discards all edits and returns to previous screen without saving data.

## User Types

### Comm Unlock - Import \ Export

Presentation of a valid credential 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

This user type cannot be locked out or disabled. Presentation of a valid credential by this user type will override any locked condition and will unlock the door, including User Lockout and Panic (lockdown) states. Presentation of this user type also allows entry on a Profile Series v.G1™ or Profile Series v.G1.5™ mortise controller if the deadbolt is thrown. This user type will unlock the door for the time specified in the Door Settings screen under "Lock Timer - Extended Users".

### Extended Time

Presentation of a valid credential 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 credential 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 credential by a Lockout user type will cause all users in that controller to not be able to gain access until another valid lockout code is entered again.

The state of the lock does not change when a Lockout code is entered. Lockout users cannot be used to gain access.

Enabling Lockout is useful if there has been a danger identified in a particular room or area and you do not want anyone to enter until the danger is cleared. To clear the Lockout condition you must enter a Lockout code again. During the lockout condition the following users types are still allowed to gain access: Master, Supervisor, and Emergency.

### Master

**NOTE:** Before you can start adding new users, SofLink Plus requires that you edit the PIN of "Master User". This is done to reduce the chances that you unknowingly send the default Master Code of "1234" to the controllers.

The User List contains, as its first user on the list, the Master Code. This user has a special function. Its access credential 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 user will go to.

Any time a new door controller is added to the system, it will automatically receive the "Master Code" when data is exported to this controller.

This user can be used as a "communications unlock" code, which is required for PDA communications with the Profile Series v.G1™, Profile Series v.G1.5™ and 4293 Wall Prox controllers.

**NOTE:** The Master User should normally not be used to gain access to battery powered controllers. Using this User Type on a regular basis to gain access will unnecessarily reduce battery life, since this User Type unlocks communications and keeps the controller powered up for up to 60 seconds.

This user can be used to clear a panic (lockdown) condition on Profile Series v.G1™, Profile Series v.G1.5™ and 4293 Wall Prox controllers.

### **Panic**

Presentation of a valid credential by this user type will lock the controller no matter what unlock state it is in (much like the Relock user type) and it will also will lockout all other users from using 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 one else will be allowed to unlock the door using a standard unlock code. Only the Master Code, Supervisor Code, or Emergency codes can be entered to gain access and clear the Panic (lock down) condition.

### **Passage**

Presentation of a valid credential 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 due to a previous Passage code, 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.

### **Standard Access**

Presentation of a valid credential by this user type unlocks the door for the pre-determined Lock Timer specified in the Door Settings.

### **Supervisor**

Presentation of a valid credential by this user type unlocks the door for the pre-determined Lock Timer value (1-255 seconds) as set in the Door Settings screen. Presentation of a valid credential by this user type also unlocks communications, so that the controller can be programmed with a PDA running SofLink PDP.

The Supervisor User can be used to gain access if a controller is in a Lockout condition caused by a Lockout User type. The Supervisor User type can also be used to enter programming mode manually at the controller hardware. For a list of the specific features that the Supervisor User can perform while in programming mode on the controller, please refer to the controllers programming manual.

The Supervisor User has gone through some changes and is handled differently in the different controllers. All controller types have one fixed Supervisor User that receive the access credentials for the User named 'Supervisor User' in the user directory. Other controller types such as the Profile Series v.G1.5™ allow you to define any number of additional Supervisor Users via an Access Level User Type.

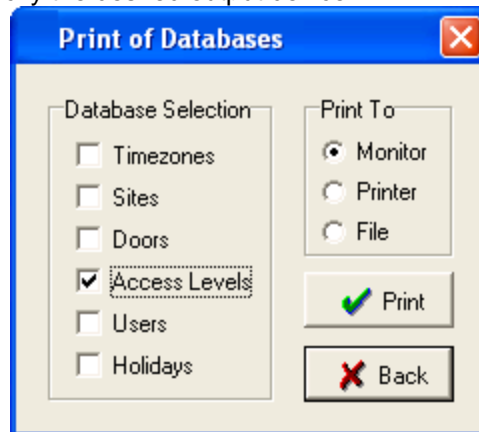
**NOTE:** Supervisor Users should normally not be used to gain access to battery powered controllers. Using this User Type on a regular basis to gain access will unnecessarily reduce battery life, since this User Type unlocks communications and keeps the controller powered up for up to 60 seconds.

Here's a chart to show the user types supported by each controller type, and how many of each type are allowed (up to the user capacity of that specific controller type).

	Profile Series v.G1™	Profile Series v.G1.5™	4293 Wall Prox
Comm Unlock - Import \ Export	No Limit	No Limit	No Limit
Emergency	No Limit	No Limit	No Limit
Extended Time	No Limit	No Limit	No Limit
Lockout	No Limit	No Limit	No Limit
Master	1 (required)	1 (required)	1 (required)
Panic	No Limit	No Limit	
Passage	No Limit	No Limit	No Limit
Relock	No Limit	No Limit	No Limit
Standard	No Limit	No Limit	No Limit
Supervisor	1 (fixed)	No Limit	1 (fixed)

### Printing Access Levels

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




## 6.7 Users

The Users option lets you add new users to the system and specify the access credentials 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 creation of a batch of users at one time. Available sort criteria is listed in the "Sort" drop-down list [First Name, Last Name, Card, PIN, RF Fob, Raw Data, Visual ID, or 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.

Users							
First Name	Last Name	Card	PIN	RF Fob	Raw Data	Visual ID	Access Level
Alan	McKenna	20953	20079		*****4A3B3	Hotstamp A-395-G	ALL ACCESS 24\7
Anthony	Froio	20954	10756		*****4A3B5	Hotstamp B-492-F	ALL ACCESS 24\7
Anthony	Phillips	20948	68968		*****4A3A8	Hotstamp B-493-F	ALL ACCESS 24\7
Brenda	Gage	20949	37144		*****4A3AB	Hotstamp B-494-F	ALL ACCESS 24\7
Christopher	Sullivan	20955	42538		*****4A3B6		ALL ACCESS 24\7
Dave	White	20950	46183		*****4A3AD		ALL ACCESS 24\7
Flack	Hans	20956	18508		*****4A3B9		ALL ACCESS 24\7
Jane	Cleveland	20951	40177		*****4A3AE		ALL ACCESS 24\7
Jim	Smith	28385	77555		*****4DDC2		ALL ACCESS 24\7
Lisa	Furnald	20957	27897		*****4A3BA		ALL ACCESS 24\7
Master	User		1234				
Rich	Williams	20952	46242		*****4A3B0		ALL ACCESS 24\7
Steve	Brand	20958	90337		*****4A3BC		ALL ACCESS 24\7
Supervisor	User						
Wendy	Zeller	20959	60201		*****4A3BF		ALL ACCESS 24\7



Sort By

Search

**User**

User Info :

This User is Enabled

First Name

Last Name

Access Level

Show the Access Level Selection Tool >>

This User can trigger First In Auto Unlock Time Zones

Card Data :

Card \ RF Fob data will be assigned

Card Format

Visual ID

Card Number

Site Code

PIN Data :

PIN data will be assigned

PIN

Random PIN Length  (4-6 digits)

Temporary \ Expiration Info

This User will expire

Expiration Type

Start Date  Stop Date

### Adding a User

1. Select the **Add** button on the Users screen. The User edit screen displays.
2. Enter the information as required.
3. Select **Save** to save the settings. To cancel the adding/editing this particular user, select the **Cancel** button.

**NOTE:** Before you can start adding new users, SofLink Plus requires that you edit the PIN of "Master User". This is done to reduce the chances that you unknowingly send the default Master Code of "1234" to



the controllers.

## Field/Button Description

### **This User is Enabled** (checkbox)

This checkbox is used to either Enable or Disable this particular User. Disabling a User means that this User will still be exported to the controller, but will not be able to gain access. An attempt to gain access by a disabled user will result in a Transaction Log event of "User - Access Denied - User Disabled" in Profile Series v.G1™, Profile Series v.G1.5™ and 4293 Wall Prox.

### **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](#) this user will be assigned to.

### **Show the Access Level Selection Tool** (button)

Selecting this button will cause the User Edit window to expand and show a tool that can be used to help you select the best Access Level for the User you are adding. Simply select the doors in the area labeled **Door Selection** that you wish to allow a user to have access to. Each time you select or deselect a door on the left, Access Levels that contain just the selected doors will be displayed on the right in the area labeled **Matching Access Levels**. When you see the Access Level you want to assigned this User to, just select that Access Level in the section labeled **User Info**.

In the following example, the Operator has selected all the doors that are in a particular building, because you know that his user will be granted access to all the doors in that particular building. In the 'Matching Access Levels' section you can see that the Access Level named 'Manager - Building A' has been displayed. This means that the displayed Access Level is has access to only the selected doors and no others. So in this example, if you assign this user to the 'Manager - Building A' Access Level, then that user won't be able to access and of the doors in Building B.

**This User can Trigger First In Auto Unlock Time Zones** (checkbox)

Enabling this option means that this User will cause a door to Auto Unlock (if that particular Door has a Time Zone specified as Auto Unlock and the **First In Auto Unlock** option is enabled in the Doors settings) If this option is disabled, then this User will simply gain access but the door will not go into a **First In Auto Unlock** state. This option is currently available only in Profile Series v.G1.5™ controllers, and will have no effect on Profile Series v.G1™ or 4293 Wall Prox controllers.

**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 related to this type of credential.

**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.

**Temporary \ Expiration Info** (checkbox)

Enabling this option will display options related to making this User expire after a predetermined amount of

time. Options related to Temporary \ Expiring Users are discussed in detail later in this section.

#### Save

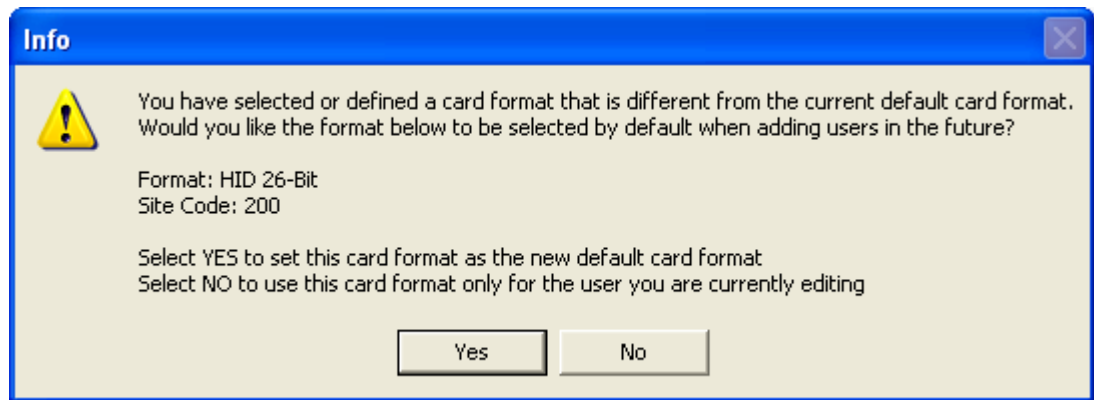
Saves the current user data to the user database

#### Cancel

Discards all edits, and returns you to the user directory

### Card Format

**NOTE:** When adding a new user, you may notice the card format and supporting data fields may be pre-filled with default data. This occurs because an Operator was previously asked if they wanted to set a specific card format to be used as the default format for all future user additions, as seen in the following screen shot that appears when saving the first user added to the system. Directly after installation, no format is set to be the default format yet, so the first user you add, you will need to select a Card format. After that point, if you chose to set that format as the default format, it will no longer be necessary to select a card format when adding new users, since it will already be selected for you. This is simply a time saver for you since you will no longer need to select a format, nor will you need to remember which format to select. Since most systems use the same format card for every user added, you will typically need to enter only the card number.



When an HID format is selected, the operator will need to enter the site code before this user can be saved. If the operator decides to save this card format and site code as the new default, then the operator will not need to enter the site code again. Again this is just a time saver.

### 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 the 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. Some card formats explained in this manual may not be available in all controllers supported by this software. It will be dependant upon the capabilities of the particular controller hardware.

Prox Card Format Name	Site Code	Site Code Editable
SARGENT 26-Bit	20	YES
Enrollment Station (HID)	N/A	N/A
HID 26-Bit	NONE	YES
HID 34-Bit	NONE	YES
RF_FOB	N/A	N/A

If you have an HID proximity card format that is not shown in the list of card formats in the software, or you have a custom HID format card, 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, and then be able to enter the card PIN into the program without the need for an Enrollment Station. This does require that you know the exact bit designations of that particular card format, including all parity bits, pin location and site code location within the format.

**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 credential. It can be used as a way to identify the owner of a lost card, if found.

**HID Proximity Card****Card Number**

This field stores HID proximity card number, typically this is the number printed on the card, but sometimes the hot stamp is just a reference number and is not the card number. The length and range of a card PIN will vary based on the particular format selected

**Site Code** (if applicable to the selected proximity format)

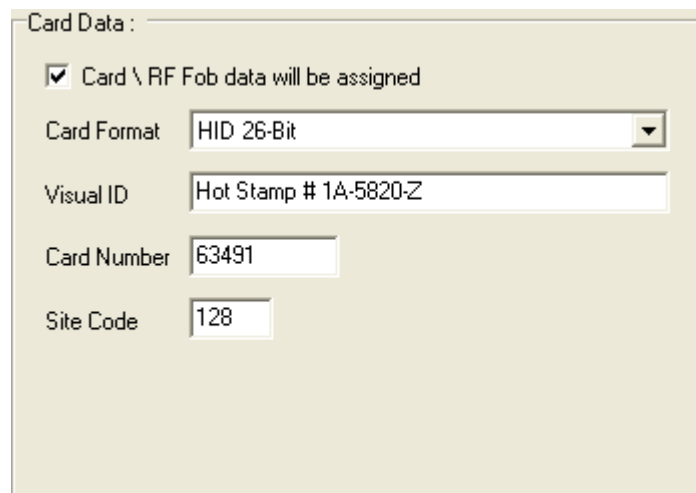
This field will be visible if the card format selected requires the operator to define the Site Code of the proximity card.

**Group Code** (if applicable to the selected proximity format)

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

**Corp. Code** (if applicable to the selected proximity format)

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



The screenshot shows a dialog box titled "Card Data :". It contains the following fields and values:

- Card \ RF Fob data will be assigned
- Card Format: HID 26-Bit (dropdown menu)
- Visual ID: Hot Stamp # 1A-5820-Z
- Card Number: 63491
- Site Code: 128

**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. If a controller or multiple controllers are within range to hear the RF Fob data, then that controller will check to see if that RF Fob data is a valid user. If a match is found, then the controller will react based upon the user type that is assigned to this user via [Access Levels](#), just like any other valid credential such as a keypad code or proximity card. Any user type can be assigned to a User that has RF Fob credentials assigned to that user.

**NOTE:** Not all controllers have the ability to work with RF Fobs. Please check your hardware vendor for availability of controllers that do support the RF Fobs.

**NOTE:** Only single button RF Fobs are supported by SofLink Plus 5.

Card Data :

Card \ RF Fob data will be assigned

Card Format: RF-FOB

Visual ID: [Empty field]

Fob Number: 372

### Fob Number

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

**NOTE:** If no number is printed on the RF Fob and you need to know the RF Fob number that should be entered into the Fob number field, please call SARGENT Technical Support for help.

### Enrollment Station

The enrollment station is a piece of hardware that connects to a serial port of the PC and allows you to read the raw data from an HID proximity card (up to 40 Bit) and then store this raw data in the database and can then be exported to the door controller. This is helpful if you do not know the exact format of the HID proximity cards you are assigning to Users, because with this Enrollment Station option, you don't have to. The raw data received by the Enrollment Station is the same data the controller receives and looks up in memory when the controller reads that same HID proximity card.

Check with your vendor for information on the availability of the Enrollment Station equipment.

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 Data From Enrollment Station' button.
4. Present the card to the enrollment stations HID proximity reader antenna.
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.

Card Data :

Card \ RF Fob data will be assigned

Card Format: Enrollment Station

Visual ID: [Empty field]

Raw Data: \*\*\*\*\*81F11

Com Port: 1

<<< Get Card Data From Enrollment Station >>>

**Enrollment Successful**

## 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 HID 40 bit (or less) card. 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. Selecting the Random button generates the code.

### Random PIN Length

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

## Temporary \ Expiring Users

The Temporary data will only affect a Users operation in controllers that support Temporary Users, and will have no affect on controllers that do not support Temporary Users.

Temporary Users are supported on the Profile Series v.G1.5™ controller and are not supported on the Profile Series v.G1™ or 4293 Wall Prox controllers.

**NOTE:** All Time Zone and Holiday restrictions that are part of the Access Level definition assigned to this User still apply.

**NOTE:** For controllers that support the Single Use user type, such as the Profile Series v.G1™ and 4293 Wall Prox , if you want to grant just one access to a User, you simply add that User and select the Expiration Type of '**Total Number of Allowed Uses**' and enter 1 for the number of allowed uses. When exported, this User will only operate the one time in each of the Profile Series v.G1™ and 4293 Wall Prox controllers that particular user may have access to, via the assigned Access Level. To give that user one more use, simply edit that user and enable the checkbox labeled 'Resend the Temp User data values on next export of this user' (as seen in the following screen shot) and then export data to the controllers. Any value entered into the Number Of Allowed Uses other than a 1, will result in the user not working on Profile Series v.G1™ and 4293 Wall Prox controllers.

Temporary \ Expiration Info :

This User will expire

Expiration Type

Number of Allowed Uses (1 - 500)

Resend the Temp User data values on next export of this user

## Temporary Users exported to controllers that do not support Temporary Users

If one or more of the controllers in your system does not support Temporary Users it is your choice to either allow Temporary Users to function or not in those specific controllers. This option is located in **Tools | Options | General Options**.

Enabling this checkbox: You are choosing to send the Temporary User data to those non-Temporary controllers, in which case the Temporary users will function indefinitely, as if Temporary data was not specified at all.

Disabling this checkbox: You are choosing to have Temporary Users not function at all, in controllers that do not support Temporary Users. Any attempt to gain access with a Temporary User credential will result in a log event of 'User - Access Denied - Bad Time Zone' being generated.

### Expiration Types

Several Expiration Types are available: **Start and Stop Date**, **Total Number of Allowed Uses**, and **Total Days after First Use**. A description and sample application of each type is given. Choose the one that best suits your needs.

#### Start and Stop Date

This type is typically easier to setup and manage than the other options, and will probably be used most often in most applications. This type allows you to specify a date range when a user will be granted access. If a user with this Start/Stop Expiration Type tries to gain access any day before the Start Date or any day after the Stop Date, they will be denied access. If the user tries to gain access any day on or in between the Start and Stop Dates, then they will be granted access, assuming there are no other Time Zone or Holiday restrictions placed on this particular user, based upon that Users Access Level definition.

Temporary \ Expiration Info

This User will expire

Expiration Type: Start and Stop Date

Start Date: 05/01/2005 Stop Date: 05/31/2005

Specifying the same date as the Start AND Stop dates is allowed and will result in that user only getting access only on that date.

If you wish to only grant access to a User for a particular time frame (Time Zone) for a particular date range, then you must do the following:

1. Assign this user to an Access Level that allows access during a particular Time Zone
2. Enable the **This User will expire** option
3. Select Expiration Type named **Start and Stop Date**
4. Specify the Start and Stop date range during which this User is to be granted access
5. Select **Save**
6. **Export** to the door controllers that this user has access to

**NOTE:** If this user is exported to multiple controllers, each controller will contain the same Start and Stop Dates, so when the Stop Date has gone by, every controller in the system will deny this user access.

There is a limit on how many unique **Start and Stop** date and unique **Days after First Use** combinations can be assigned to all users globally. The limit of unique intervals is 500. This means that you can create no more than 500 Users that have unique **Start and Stop** date combinations or unique **Days after First Use** intervals from those of other Users in the system that have either of those Temporary types specified. If you are planning to assign Start and Stop Dates to more than 500 Users, then it is recommended that you try to assign the same Start and Stop Date combinations to as many Users as possible.

For example: If you are issuing memberships, where your customers typically renew their membership each month, then you should try to specify a Start Date that begins on the first day of the month and specify a Stop Date that ends on the last day of the month, and are only 1 month long. In this case you would only have used up 12 of the 500 unique Start/Stop combinations (within a given 12 month period), as you can see in the following chart.

Month	Start Date	Stop Date
January	1/1	1/31
February	2/1	2/28
March	3/1	3/31
April	4/1	4/30
May	5/1	5/31
June	6/1	6/30
July	7/1	7/31
August	8/1	8/31
September	9/1	9/30
October	10/1	10/31
November	11/1	11/30
December	12/1	12/31

If you also renew memberships quarterly (3 months at a time), then you should follow the same principal, where the Start Date is the first of the month and the Stop date is the last day of the month. In this case you would have only used up 4 of the unique combinations, as you can see in the following chart.

Quarter	Start Date	Stop Date
Quarter 1	1/1	3/31
Quarter 2	4/1	6/30
Quarter 3	7/1	9/30
Quarter 4	10/1	12/31

Even if you allow any number of months to be renewed, as long as you always Start on the first day of any given month and Stop on the last day of any given month, you will only use up 78 of the total 500 possible unique Start/Stop combinations (within a 12 month period), as you can see in the following chart.

		<b>Stop Date</b>												
		1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30	10/31	11/30	12/31	
<b>Start Date</b>	1/1	1	1	1	1	1	1	1	1	1	1	1	1	12
	2/1		1	1	1	1	1	1	1	1	1	1	1	11
	3/1			1	1	1	1	1	1	1	1	1	1	10
	4/1				1	1	1	1	1	1	1	1	1	9
	5/1					1	1	1	1	1	1	1	1	8
	6/1						1	1	1	1	1	1	1	7
	7/1							1	1	1	1	1	1	6
	8/1								1	1	1	1	1	5
	9/1									1	1	1	1	4
	10/1										1	1	1	3
	11/1											1	1	2
	12/1												1	1
<b>Total Combinations</b>													<b>78</b>	

Using up 78 of the total 500 is true within the time span of 12 sequential months. Whereas in a period of 24 sequential months the total number of unique combinations rises to 222, assuming the Start Date is the first of the month and the Stop Date is the last day of the month.

If you know you are going to assign Temporary Start/Stop Dates to **NO** more than 500 Users, then you can feel free to use any Start Date and any Stop Date combination you like, since you will never go over the



limit of 500 unique Start/Stop combinations.

*Sample Application # 1:* The **Start and Stop Date** expiration type may be used in the event where you have customers that purchase access to a particular area or room (such as a fitness room, self storage facility, etc...) and the User has unlimited access to this secured area in between the Start and Stop Dates.

### Total Number of Allowed Uses

This type allows you to specify how many times this user will be granted access before access will be denied. The maximum number of uses that can be entered is 500.

There is no limit of users that can be setup with this Temporary User type. It is possible that every user in the system could be assigned a **Total Number of Allowed Uses**.

**NOTE:** If this user is exported to multiple controllers, then each controller will maintain a separate tally of how many valid uses remain. That is to say that when you assign a User to have only 100 uses then that 100 uses gets exported to all doors that this user has access to (via that users Access Level definition), when that User gains access to "Door A", the "Number of Remaining Uses" counter for that user in that particular door controller gets decremented by 1 and there are now only 99 uses left.

*Sample Application # 1:* The Total Number of Allowed Uses expiration type may be used in the event where you have customers that purchase access to a particular area (such as a fitness room, self storage facility, etc..) but the number of uses is predetermined.

### Total Days after First Use

This type allows you to specify how many days that you want this users access credentials to continue to function after the first time this user is used. For example: If 'Days allowed after first use' is set to 1, and this user uses a credential for the first time at 2pm on Tuesday, then the user s credentials will be valid until the following day – Wednesday until 2pm. In other words, 'Total Days After First Use' is 24 hr specific not day specific.

The maximum number of days that can be entered is 36500 (100 years).

There is a limit of 500 Users that can be assigned to unique intervals of this Temporary User type, but multiple users can be assigned to the same duration interval using the button labeled 'Copy Temp settings from another user'.

**NOTE:** If this user is exported to multiple controllers, then each controller will maintain a separate Stop Date, based upon when this user first used their credential at that individual door controller.

*Sample Application # 1:* The **Total Days after First Use** expiration type may be useful in the event where you are hiring a contractor to perform some work that has been quoted to take no longer than 90 days, but the contractor can't be sure of the exact date that they are able to start. In this case you can simply add this user to the system any time you like, and set the **Total Days After First Use** to 90. Now the contractor can start the job whenever they are ready and you can rest assured that the contractor will no longer be able to gain access 90 days from the day the contractor first gained access. To have all the people working on the contractors crew receive the same Stop Date, simply use the "**Copy Temp settings from another user**" and pick the Crew Foreman from the list. Now all the crew members will be denied access on the same date.

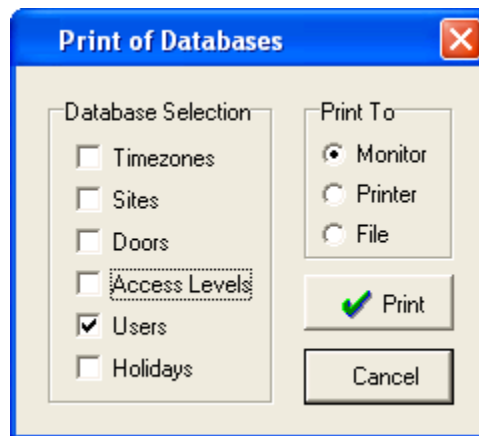
*Sample Application # 2:* The **Total Days after First Use** expiration type may be used in the event where you have customers that purchase monthly access to a particular area (fitness room, self storage facility, etc...) but the user can start their month whenever they want. In this case you would set the **Total Days After First Use** to 30.

### Copy Temp settings from another user

This option allows you copy the Temporary settings of another user. Upon selecting this option, a list of all Temporary Users will appear showing the Temporary Type and the details of that type. Simply double-click the User that you want the user being edited to follow.

### Printing User Records

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



### Master Code

**NOTE:** Before you can start adding new users, SofLink Plus requires that you edit the PIN of "Master User". This is done to reduce the chances that you unknowingly send the default Master Code of "1234" to the controllers.

- 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.
- This user can be used as a "communications unlock" code, which is required for PDA communications with the Profile Series v.G1™, Profile Series v.G1.5™ and 4293 Wall Prox controllers.
- This user can be used to clear a panic (lockdown) condition on Profile Series v.G1™, Profile Series v.G1.5™ and 4293 Wall Prox controllers.

**NOTE:** The Master Code should normally not be used to gain access to any battery powered controllers.

Using this code type to gain access will reduce battery life, since it unlocks communications and keeps the controller powered up for up to 60 seconds.

## 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.
- The Profile Series v.G1.5™ does not support the 'fixed' Supervisor User type, but instead allows you to assign the Supervisor User type in the Access Level definition. This means you can have any number of Supervisor Users in an Profile Series v.G1.5™ controller, simply by assigning multiple users to the Access Level that is setup with the Supervisor User type (see following image).

Door Name	User Type	Access Condition
Back Door	Supervisor	Code OR Card
Front Door	Supervisor	Code OR Card
Side Door	Supervisor	Code OR Card

## Disabling a User

You may find that you have a user going on an extended vacation or leave of absence and you want to disable this user so that their criteria can't be used to gain access. Simply edit that user and deselect the checkbox labeled **This User is Enabled**, and select **Save**. Now export to all the doors that this user has access to. When it's time to grant this user access again in the future, simply select the **This User is Enabled** checkbox and export to the controllers again.

User Info :

This User is Enabled

First Name

Last Name

Access Level

[Show the Access Level Selection Tool >>](#)

This User can trigger First In Auto Unlock Time Zones

The screenshot shows a 'User Info' dialog box with a red banner at the top that reads 'USER DISABLED'. Below the banner, there is a checkbox labeled 'This User is Enabled' which is unchecked. The 'First Name' field contains 'Jim' and the 'Last Name' field contains 'Smith'. The 'Access Level' is set to 'ALL ACCESS 24-7-365' in a dropdown menu. Below this is a button labeled 'Show the Access Level Selection Tool >>'. At the bottom, there is a checked checkbox labeled 'This User can trigger First In Auto Unlock Time Zones'.

Another way to disable a user is to create an Access Level called "NO ACCESS" that has access to no doors in the system. Now you can simply move users you want to disable to this particular Access Level, perform all data exports, which will cause this user to not be granted access. And when the user starts work again, you can simply change the Access Level for that user to the original Access Level he was assigned to and then export again.

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'.

### 6.7.1 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 20,000 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 1,998 in this manner (1,998 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. Select the **Open CSV File** button and browse to where you have stored the CSV file containing the user names. If the list is Imported successfully you will receive a message 'File Read OK'.
2. Select **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 deselect it by removing the check in 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 Selecting One from the List

To select a block of names using the list, first select the name at the top of the block to be selected, then hold down Shift and select 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 select 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 1,000 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 assign 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 select 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 2,000 users and 1,800 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 door. 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 some changes.

Refer to the [Doors](#) section for details.

**6.7.2 Add User Group**

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

1. Select 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. Select **Add** to save the user data to the user database. To cancel the addition of a card group, select the **Cancel** button.

**NOTE:** Before you can start adding new users, SofLink Plus requires that you edit the PIN of "Master User". This is done to reduce the chances that you unknowingly send the default Master Code of "1234" to the controllers.

### Field/Button Description

#### Number of Users to Add

Specifies the number of users being added during this process

#### Access Level

Specifies the access level for these users.

#### Generate Sequential Card (checkbox)

Checkbox that specifies that a card credential will be assigned to the users being added

#### Card Format

Specifies the format of the cards you are adding

#### First Sequential Card Number

Specifies the card number for the first sequential card being added for this group

#### Site Code, Group Code, Corp Code

This is where you define the Site, Group, or Corporate code HID prox cards you are adding sequentially, dependant upon which card format you have selected. You are required to know the exact site code of these cards you are adding in your access control system. If you do not know the site code, you may have to use the 'Enrollment Station' option and add these users one at a time using the standard Add User feature.

#### Generate Random PIN (checkbox)

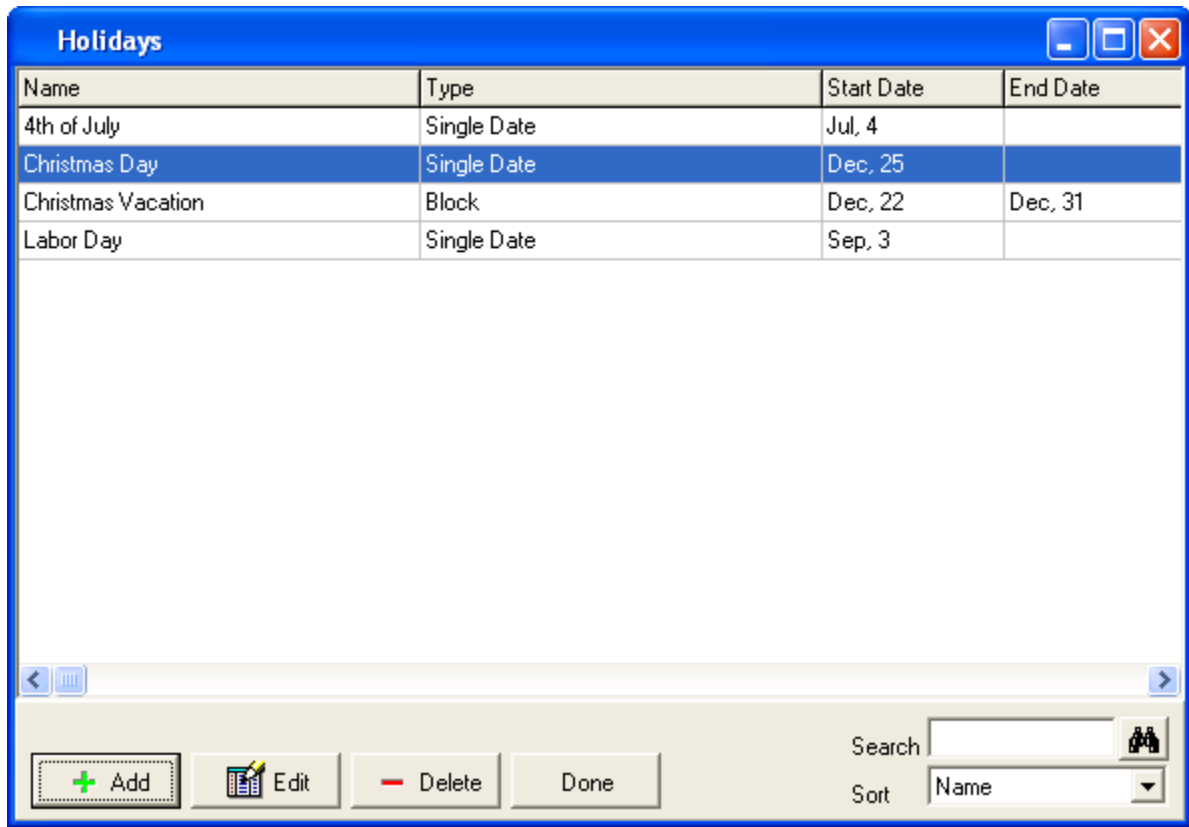
Checkbox that specifies that a random PIN will be assigned to the users being added

#### PIN Length

Specifies the length of the random PIN number

**NOTE:** For more details on the fields above refer to the section that discusses [Users](#).

## 6.8 Holidays



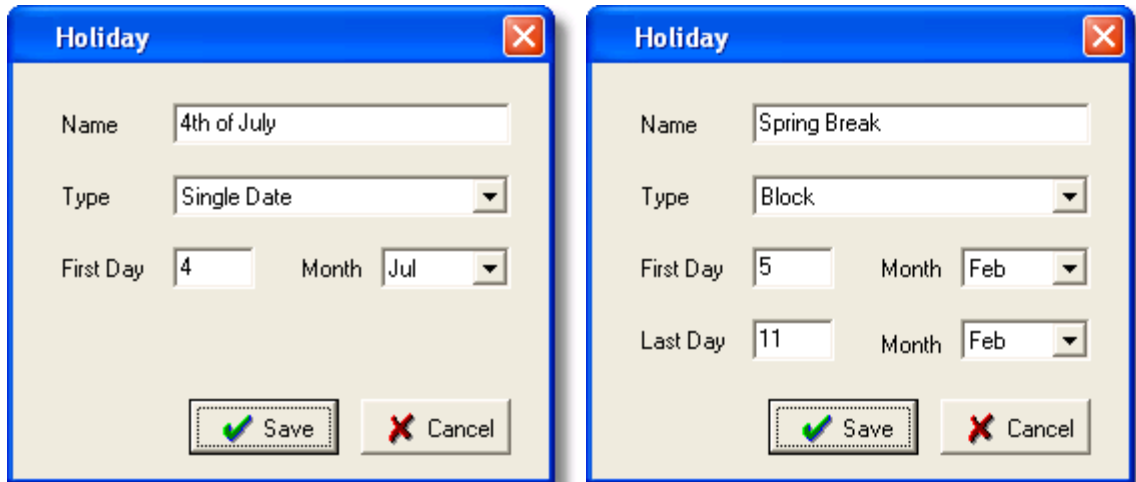
### Holidays Option

- 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 controller in the system.
- The Holidays database can be sorted by Name, Date or Type. To select the Holidays option, select **Database | Holidays**. The Holidays directory screen displays.

### Adding a Holiday

1. Select the **Add** button on the Holidays screen. The Holiday Definition screen displays. The two fields on this screen are self-explanatory.

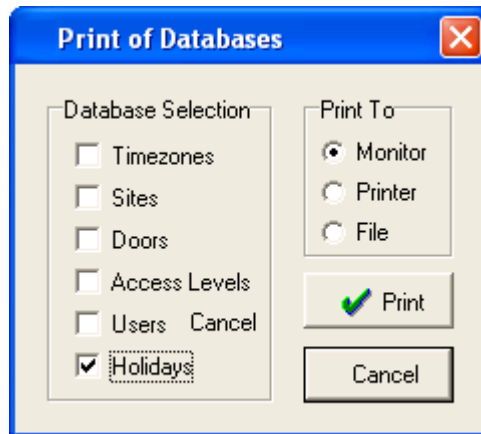




2. To define a holiday, select an undefined holiday and type in the name for it, in the "Name" field.
3. Select the desired "Type." For Single day start, enter the first day and month fields; for Block, enter both the first day and month and the last day and month. Because year information is not specified, the start date has to precede the end date in the single calendar year.
4. Select **Save** to save the holiday definition.

### Printing Holidays

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



## 7 Communications

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### 7.1 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 Doors in All Sites](#)

[Import Door Settings](#)

[Export to Doors](#)

[Export to All Doors in All Sites](#)

[Export Date/Time](#)

[Network Query](#)

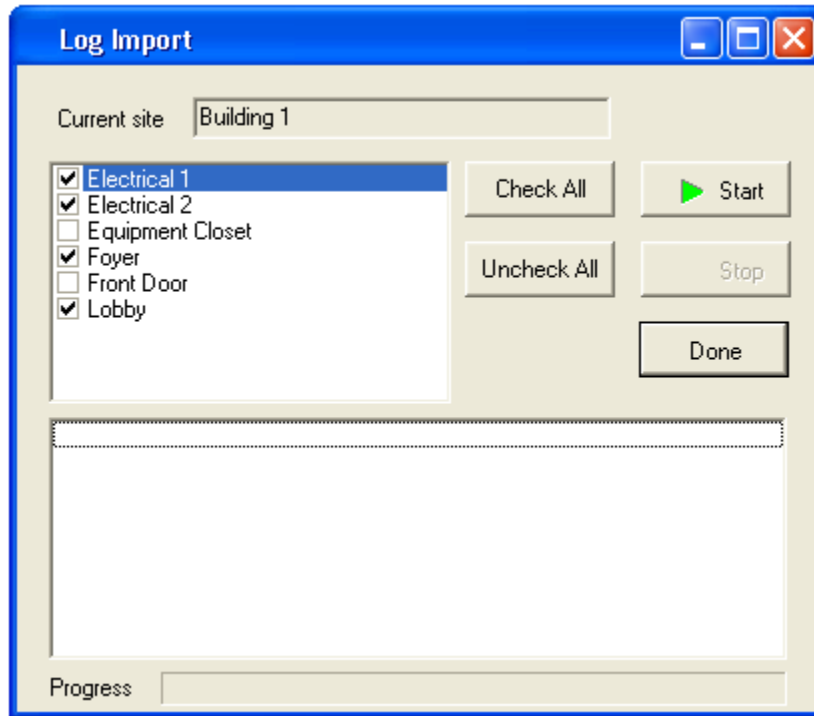
### 7.2 Import Log

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.

**NOTE:** If you are communicating with controllers using a PDA, make sure that you HotSync with the PDA before attempting to use the Import Log feature. The HotSync will move any log files that came back from the controllers off the PDA and onto the PC. Those logs will then be ready to import into the SofLink Plus software database using the Import Log or the [Import Log from All Doors in All Sites](#) feature.

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, select 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.

##### Check All/Uncheck All

Selects or 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.

##### Done

Closes the Log Import screen and returns you to the main screen.

## 7.3 Import Log from All Doors in All Sites

The Import Log From All Door in All Sites option on the Communications menu lets you retrieve all transaction logs from all [doors](#) in all sites. This option automatically connects to the sites 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. Selecting on the **Cancel** button, during this process, disconnects from the currently connected site, and stops the Log Import process.

**NOTE:** If you are communicating with controllers using a PDA, make sure that you HotSync with the PDA before attempting to use the Import Log feature. The HotSync will move any log files that came back from the controllers off the PDA and onto the PC. Those logs will then be ready to import into the SofLink Plus software database using the [Import Log](#) or the Import from All Doors in All Sites feature.

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

### 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/Stop**

Starts/Stops the import log process

**Done**

Closes the Log import screen, and returns you to the main screen

## 7.4 Import Door Settings

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

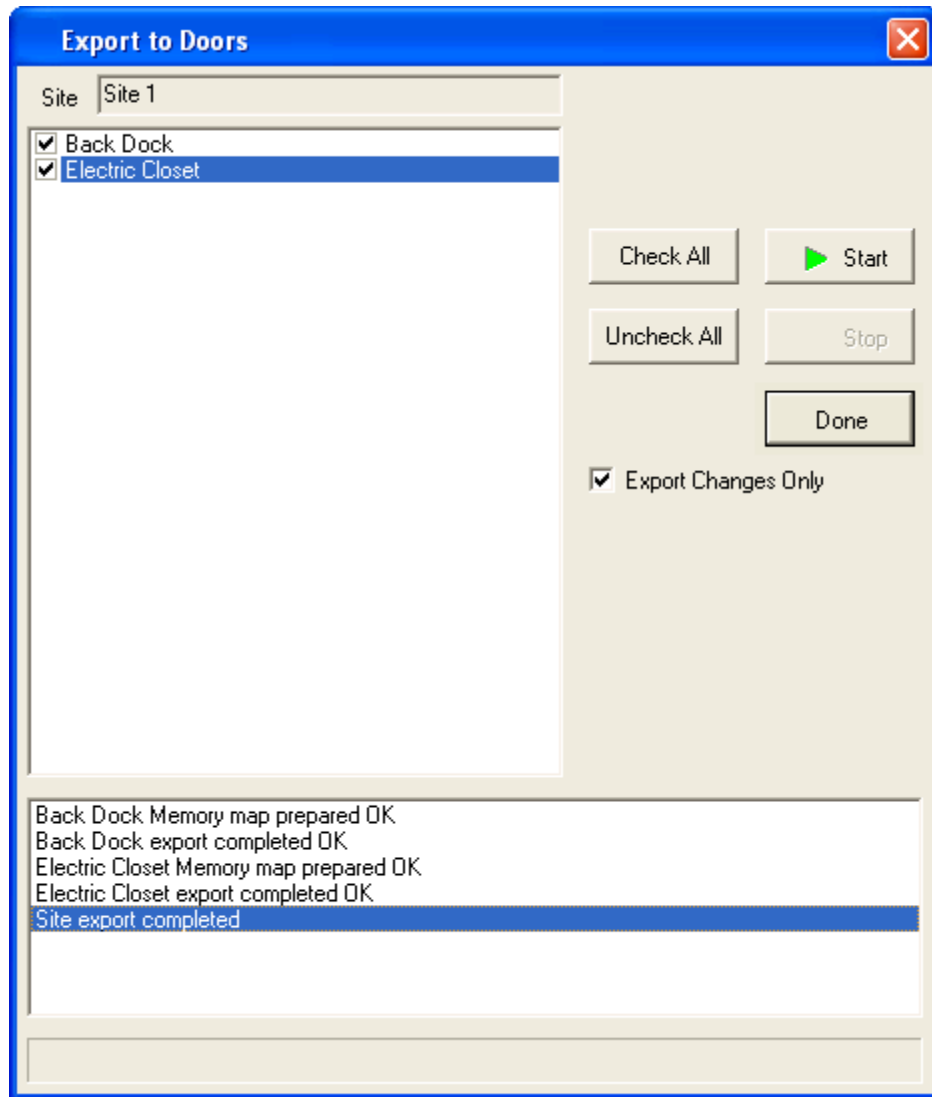
The Import Door Settings option imports and displays the complete user data and [door](#) settings of any physically connected (com port, modem, or TCP/IP) door controller to the SofLink Plus computer. This is useful if the contents were modified from the local keypad, or in case of unknown diagnostic 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. Select the door controller you wish to import the settings from. To begin the import, select **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, select **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.

## 7.5 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 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, select **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 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 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 v.G1™, Profile Series v.G1.5™ and 4293 Wall Prox), you will now need to run HotSync to get the data to the PDA, and then you can walk around and export to the controllers.

## 7.6 Export to All Doors in All Sites

The **Export Data to All Doors in All Sites** option on the Communications menu lets you send data to multiple [doors](#) in multiple [sites](#) without the need for you to manually "connect" to each site prior to exporting. During the export process, each site will automatically be connected to and the exports to the selected doors for that site will be attempted.

Selecting the **Stop** button after the export process has been started will stop the export to that particular door and will cause a disconnect from the currently connected site.

1. Select **Communications | Export to All Doors in All Sites** from the main menu.
2. Any doors that known to contain changes will automatically be selected and will already have a checkmark next to the door name. If no doors are selected when this screen is opened, then this means that SofLink Plus believes that all changes were previously sent to the controllers.
3. Make any additional door selections (if required).
4. Select the **Start** button to begin the export process.

**NOTE:** For PDA connected sites, make sure that after the export is complete you run HotSync. This will move the data files from the PC to the PDA.

### Field/Button Description

#### Exporting Progress Bar

Shows detailed export progress for the current door

#### Door Progress Bar

Shows the progress of the individual door currently being exported

#### Total Progress Bar

Shows the progress of the total door export process, for all doors in all sites

#### Export Changes Only (checkbox)

If this option is enabled, then just changes since the last successful export will be sent. Enabling this option results in a faster export time. Disabling this option results in the longest export time possible, but will guarantee that all data in the controller will be overwritten and will match the data in the software exactly.

**NOTE:** If you have replaced the controller hardware for a particular door(s), it is required that you disable this option, and only select the doors that had a controller replaced, then perform an export. This will result in all data in the controller being completely synchronized with the database on the PC.

**WARNING:** If you have Temporary Users ('Number of Uses' or 'Numbers of Days after First Use') in the doors you have selected, and you de-select the 'Export Changes Only' checkbox and do not select the 'Reset ALL Temp User data during the full export' option, then all those Temporary Users will be exported and will not be set as Temporary Users, and will be able to gain access as if they were not set to Temporary at all.

#### Reset ALL Temp User data during the full export

Enabling this option will reset all Temporary User data to the original values stored in the PC. This option is only available when you de-select the 'Export Changes Only' option. This option is only relevant to the 'Total Number of Uses' and 'Total Days After first Use' Temporary User type, and does not impact 'Start and Stop Date' Temporary User types. If you have no Temporary Users in the selected doors, then this checkbox has no impact at all.

**WARNING:** If you have Temporary Users ('Number of Uses' or 'Numbers of Days after First Use') in the doors you have selected, and you de-select the 'Export Changes Only' checkbox and do not select the 'Reset ALL Temp User data during the full export' option, then all those Temporary Users will be exported and will not be set as Temporary Users, and will be able to gain access as if they were not set to

Temporary at all.

**Update Time/Date in controller (checkbox)**

Updates the clock in the door controller with the time of the PC. If you have a PDA connected controller, then this option will have no effect, since that controller type will get it's clock update from the PDA itself.

**Door Selection List**

Placing a checkmark next to a door name will include that door in the export process

**Select All Doors (button)**

Selects all doors in the door selection list

**Select No Doors (button)**

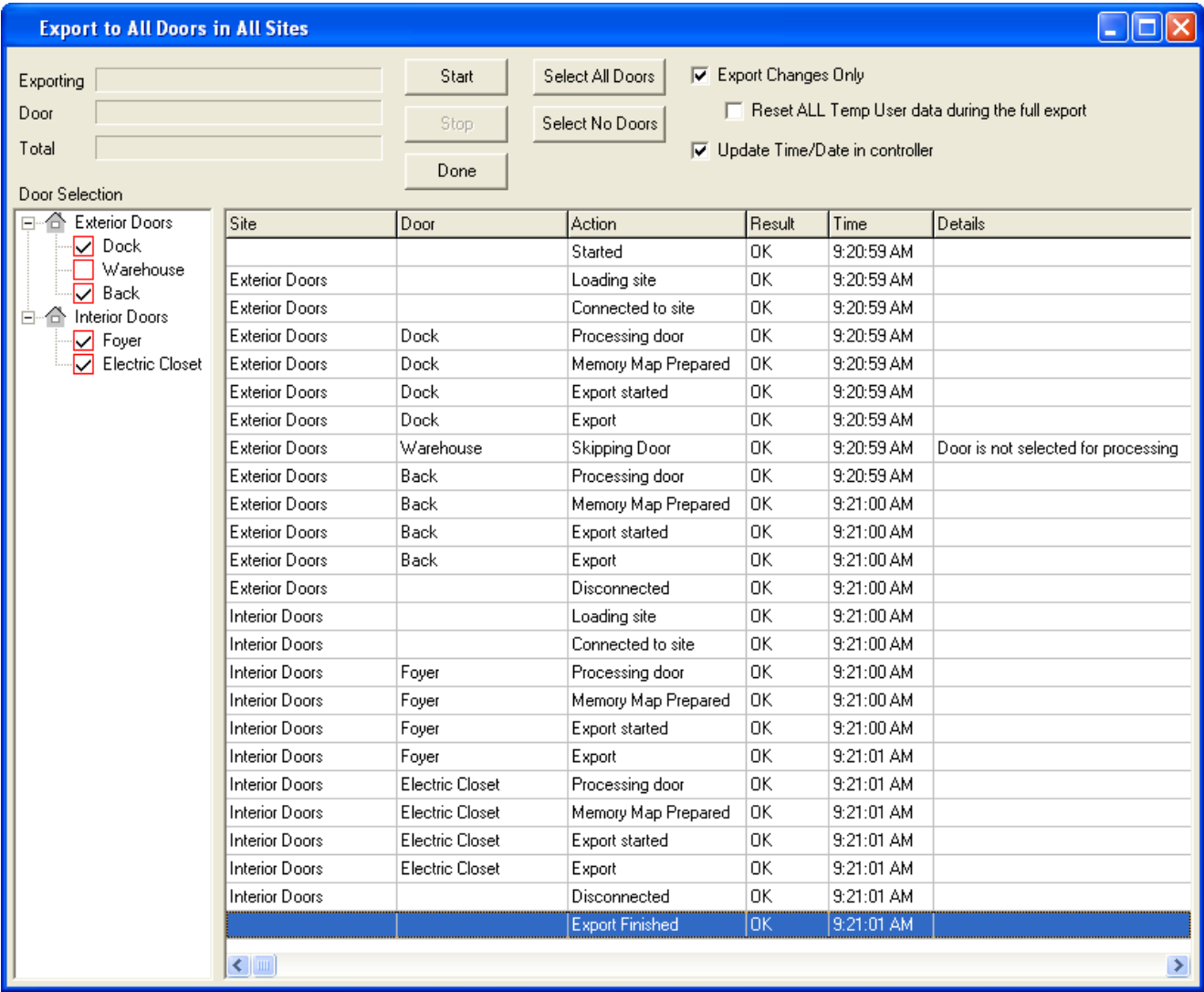
Deselects all doors in the door selection list

**Start\Stop**

Starts\Stops the export process

**Done**

Closes the **Export to All Doors in All Sites** screen and returns you to the main screen



## 7.7 Export Date/Time

**NOTE:** The PC does NOT set the Time\Date on PDA connected controllers. Controllers connected via PDA 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 v.G1™, Profile Series v.G1.5™ and 4293 Wall Prox controllers, 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 screen for those particular doors.

**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 (hard wired) Communication Line

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.

It is also possible to use the [Export to All Doors in All Sites](#) feature to update the time and date at the same time you are exporting data to the controllers.

### 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 controller any time you communicate using the PDA. The clock of the PDA is used in this case.

## 7.8 Network Query

**NOTE:** If the site you are trying to Network Query are PDA connected controllers, then the Network Query will simply display the time and date of the most recent Transaction Event. This is helpful if you want to know the last time the PDA connected controllers were communicated with.

The Network Query option scans the controller 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 "Controller 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 that 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 select the **Connect** button.
4. After the connection is made, select the **Cancel** 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**

Selecting 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.

**Done**

Closes the Network Query screen, and returns to the main screen.

**Found, Name, Expected**

Displays the network status of the controllers.

### Description of Network Query Icons

**Black Checkmark**

Controller event data was found

**Red "X"**

No door controller event data was found

**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.

## 8 Tools

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### 8.1 Tools Menu

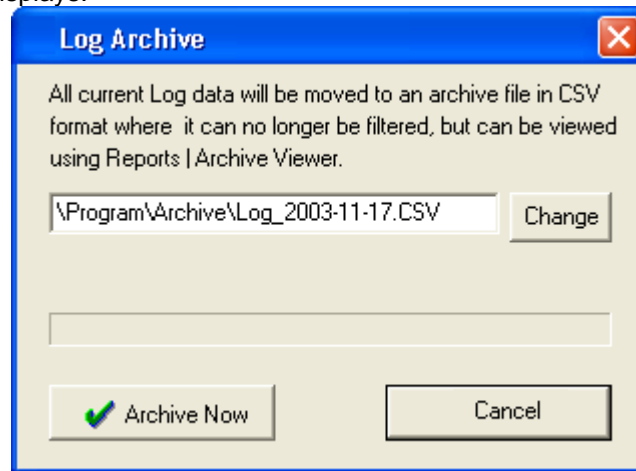
Select **Tools** from the SofLink Plus main menu. The Tools drop-down menu displays.

- [Log Archiving](#)
- [Audit Archiving](#)
- [Database Backup/Restore](#)
- [Run Com Port Test](#)
- [External Tools](#)
- [Scheduled Log Import](#)
- [Table Initialization](#)
- [Indexing](#)
- [Application Initialization](#)
- [Options](#)

### 8.2 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, select 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 select the **Open** button. You return to the Log Archive screen.

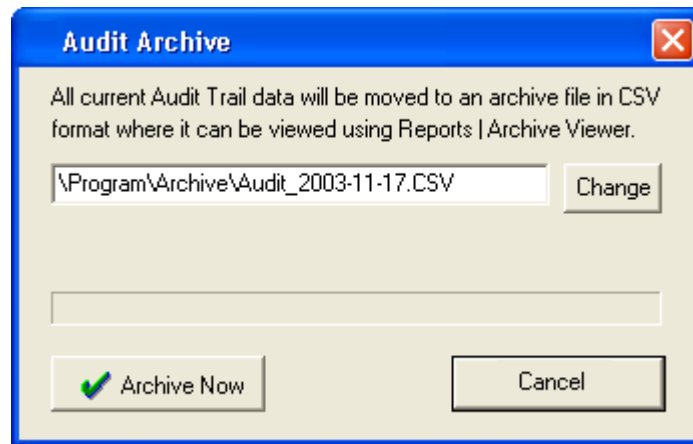
4. Select the **Archive Now** button. A message displays informing you of the status of the archive.

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.

## 8.3 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, select 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 select the **Open** button. You return to the Audit Log Archive screen.
4. Select the **Archive Now** button. A message displays informing you of the status of the archive. Audit archives can be opened for viewing using the **Reports | [Archive Viewer](#)** option.

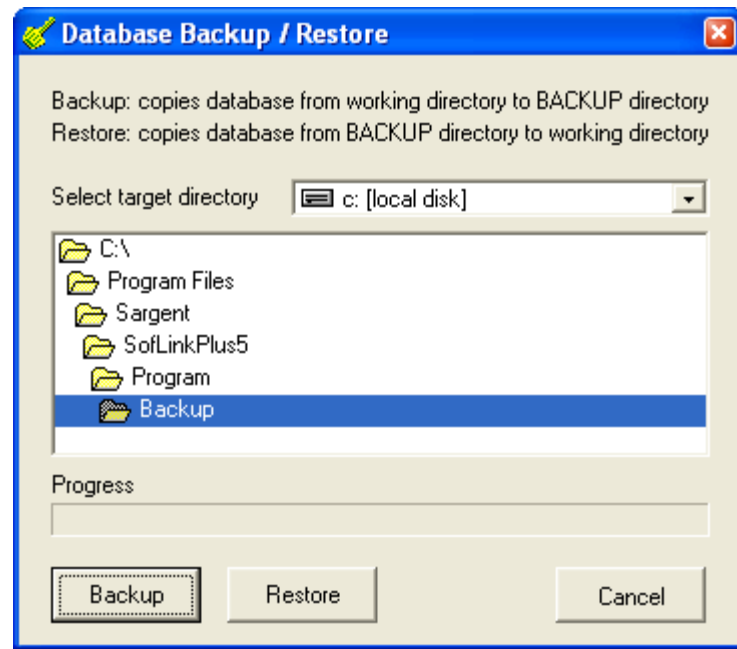


## 8.4 Database Backup/Restore

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.

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. Select the **Backup** button to begin the backup. Alternatively, select 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 5, 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 you are using PDA connected controllers, it will not be necessary to perform the Com Port Test.

### About the Com Port Test Program

The Run Com Port Test option, once selected, runs a standard Com Port test. This program tests the availability of your computer's Com ports 1 - 4, and also determines if these ports can be used for communications via the supplied connectors.

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. This program tests the availability of your computer's Com ports (serial communications ports), and also determines if these ports can be used for communications via the supplied connectors. SARGENT recommends that you run this program; it can also be selected and run separately. There are two parts to this procedure (testing without the loopback connector and testing with it), and both parts must be performed.
2. Start the COM Test program in one of two ways: (a) by selecting 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.
3. To start the first part of the Com test, disconnect all devices from the Com port on your computer designated for SofLink Plus controller communications, then select **Start Test**.
4. This message then displays: Please make sure the loopback connector is NOT installed and select **OK** to continue or **CANCEL** to stop testing.
5. Ensure that the supplied Loopback connector is Not connected to any of the Com ports on your computer. Then select **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.
7. Select **OK** to continue or cancel to stop testing.
8. Connect the Loopback connector to the computer Com port designated for SofLink Plus controller communications. One side of the Loopback connector has a female DB9-pin connector, the other side a DB25-pin connector; connect using the appropriate side, then select **OK**, to begin the second part of

the Com test. If part two of the Com test is successful, this or a similar message displays overlaid on the Test Results screen.

9. The test connector has been found at COM Port: x. Please record this information and select the same COM port for use with the SofLink Plus program.
10. If the test is not successful, there can be several problems: no Com ports are available, available Com ports are being shared with other devices, or available Com ports are not working correctly. Contact your computer dealer as you may need to add another Com port.
11. Record the Com port information safely as instructed and then select **OK**.
12. Review the information on the Com Port Test Results screen as necessary and then select **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 select the **Save** button.

To navigate to a different path, select 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 5 folder in the \program folder at the following path: C:\Program Files\SARGENT \SofLinkPlus5\Program\COM TEST.exe

These settings do not normally need to be changed.

See also: [Run Com Port Test](#)

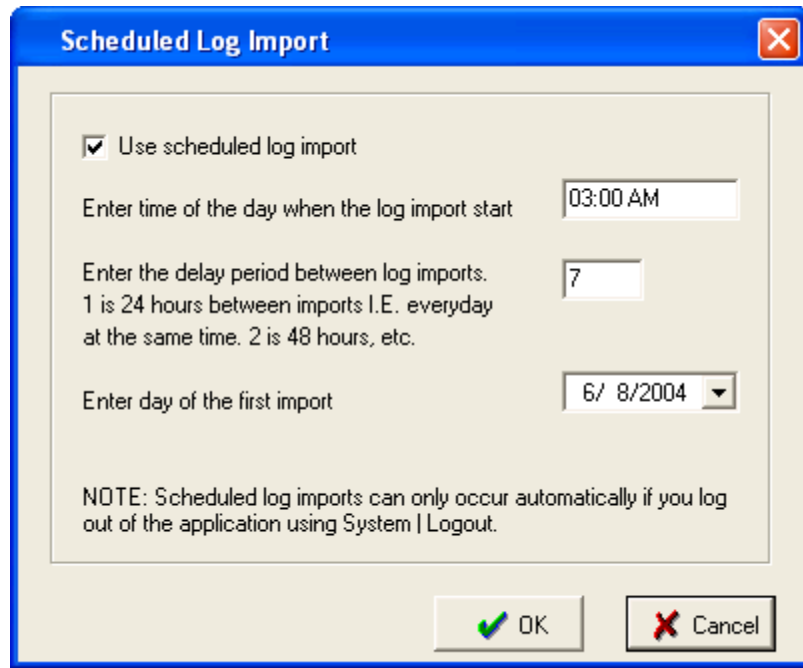
## 8.7 Scheduled Log Import

then The Scheduled Log Import option lets you specify the time, delay 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.

**NOTE:** The **delay period** is how many days you want to lapse before another scheduled log import will occur.

**NOTE:** With PDA connected controllers such as the Profile Series v.G1™, Profile Series v.G1.5™, and 4293 Wall Prox, the Scheduled Log Import feature will simply attempt to import any new Transaction Log data that may have already been placed onto the PC during a HotSync with a PDA running SofLink PDP. This can be helpful if you have a person, such as a tour guard, that is responsible for regularly visiting the door controllers with the PDA and collecting the Transaction Logs, and only HotSync's the PDA with the managers PC and then leaves. With Scheduled Log Import enabled, SofLink Plus will automatically import those new transaction events into the database, without the need for the manager to remember to perform that action before generating a Transaction Log report. This helps keep newly generated reports, that the manager creates, as up to date as possible.

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. Enable the 'Use scheduled log import' checkbox to enable this feature.
3. Enter the desired parameters and select the **OK** button.



See also : [Logout](#), [Scheduled Log Import Errors](#), [Scheduled Log Import Reminder](#)

## 8.8 Scheduled Log Import Reminder

See also [Scheduled Log Import](#)

If you are logged into SofLink Plus when the Scheduled Log Import is set to run automatically, a message box 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!!!**

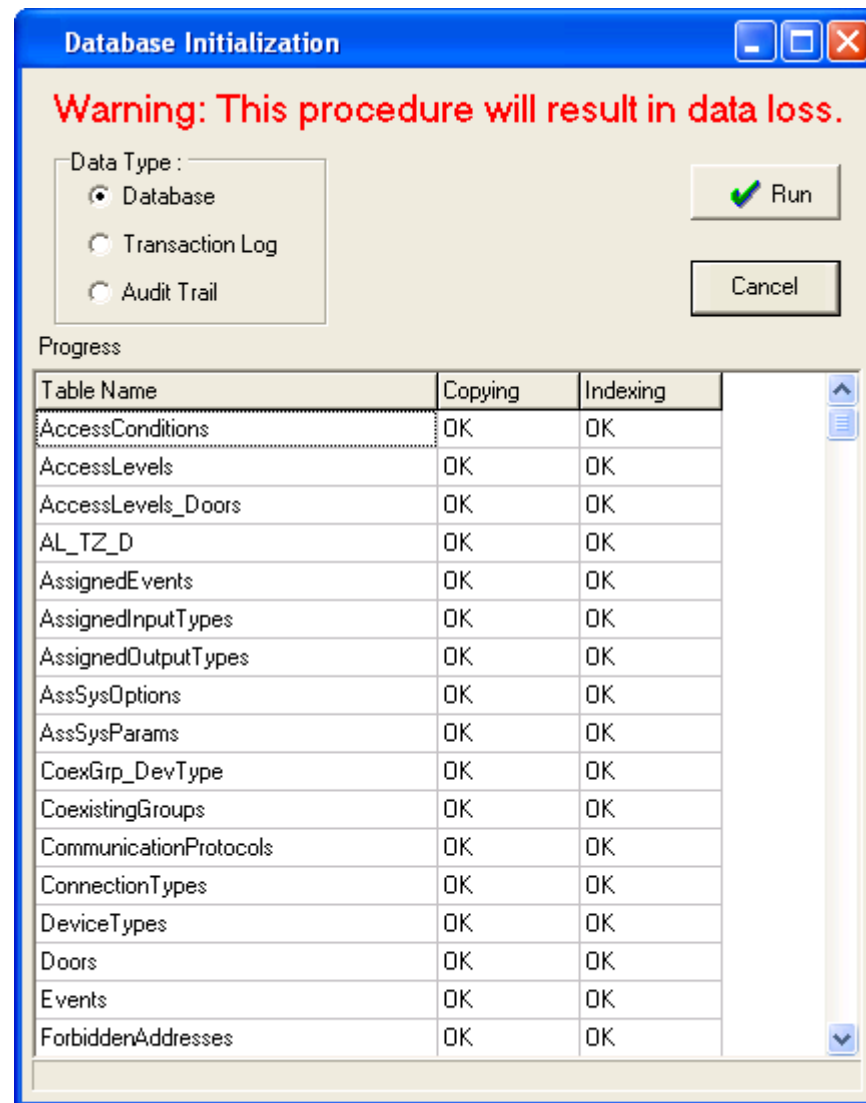
The Table Initialization option initializes (resets to zero) the SofLink Plus program's databases. You can select from several types of initialization:

**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,
  - Database - Erases all data in all tables, excluding the Transaction Log and Audit Trail
  - Transaction Log - Erases just the Transaction Log table
  - Audit Trail - Erases just the Audit Trail
3. Select the **Run** button. A confirmation prompt displays.
4. Select **Yes** or **No** to reply as appropriate. If you select Yes, the program performs the specified database initialization, displaying the results under the Copying and Indexing columns as shown in the previous example.

## 8.10 Application Initialization

The Application Initialization option defaults the program's parameters back to an "Out of Box" state. 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 software.

The parameters and settings that are reset include, but are not limited to:

- disables the "Scheduled Log Import" feature and settings
- disables System Manager and associated settings
- defaults the Report Writer path, password, and options
- disables Auto Login and resets settings
- removes custom Support contact info

- removes the default card format setting
  - removes all memory of custom screen size and position of the screens opened in SofLink Plus
1. Select **Tools | Application Initialization** from the SofLink Plus main menu to access the Application Initialization program. A confirmation prompt displays.
  2. Select **OK** or **Cancel** to reply as appropriate. If you select **OK**, the program resets all application settings to the default values and then displays a prompt at the end (not shown).
  3. Select **OK**.

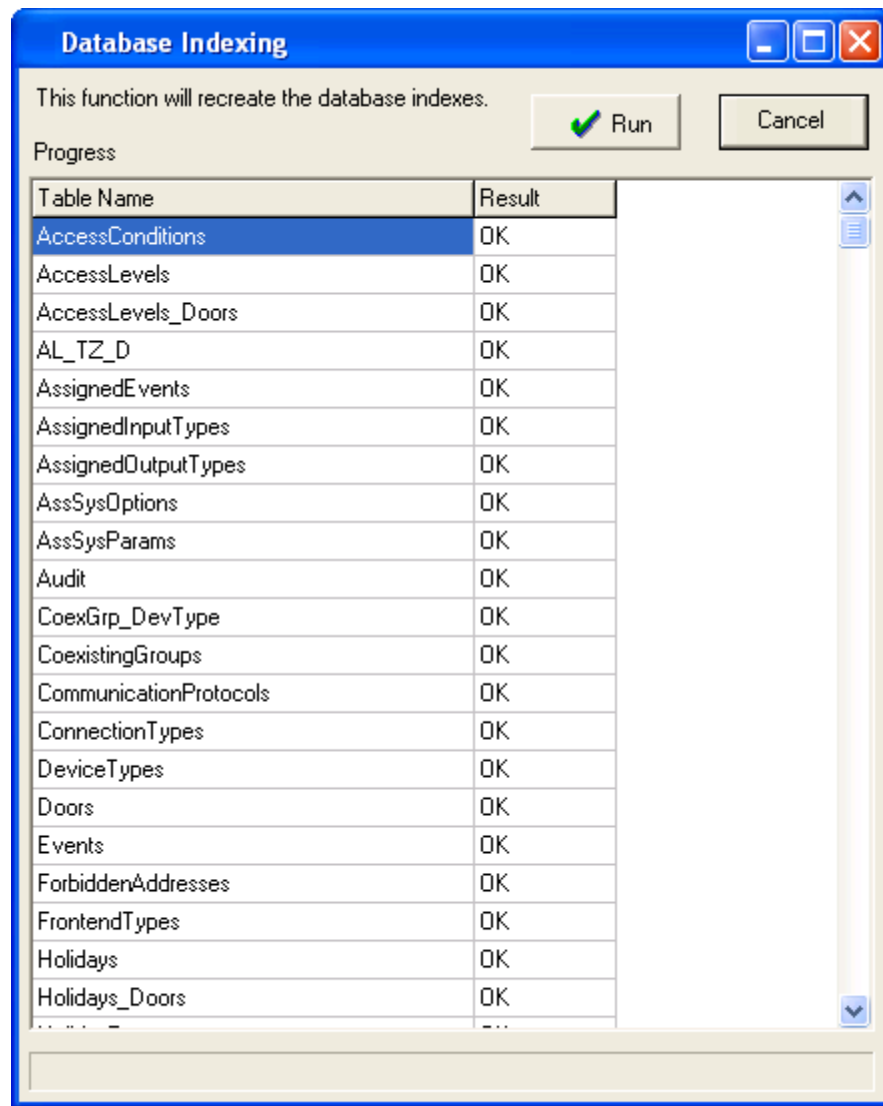
## 8.11 Indexing

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. Select the **Run** button to continue indexing or the **Cancel** button to return to the main menu. A confirmation prompt displays. If you select **Run**, the program performs the indexing, displaying the results under the right hand "Results" column.
3. Select the **Cancel** 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' feature creates an exact copy of the current database that SofLink Plus is working from. The copy is made in order to allow a 3rd party report writing program such as Crystal Reports to access the data 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

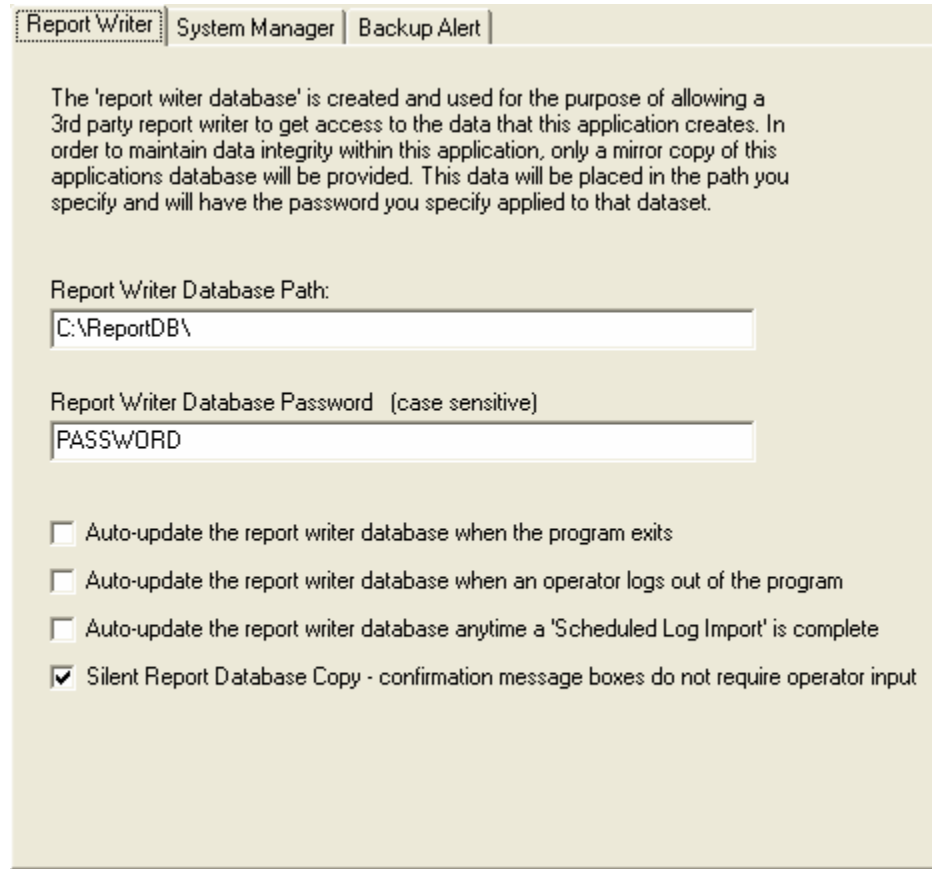
This is the password that will be required to open the database copy within the 3rd party report writer.

#### Auto-Update Options

Specifies when the database copy will be updated. Selecting all 3 will keep the database copy up to date.

#### Silent Report Database Copy

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



The screenshot shows a dialog box titled "Report Writer" with three tabs: "Report Writer", "System Manager", and "Backup Alert". The "Report Writer" tab is selected. The dialog contains the following text and controls:

The 'report witer database' is created and used for the purpose of allowing a 3rd party report writer to get access to the data that this application creates. In order to maintain data integrity within this application, only a mirror copy of this applications database will be provided. This data will be placed in the path you specify and will have the password you specify applied to that dataset.

Report Writer Database Path:

Report Writer Database Password (case sensitive)

Auto-update the report writer database when the program exits

Auto-update the report writer database when an operator logs out of the program

Auto-update the report writer database anytime a 'Scheduled Log Import' is complete

Silent Report Database Copy - confirmation message boxes do not require operator input

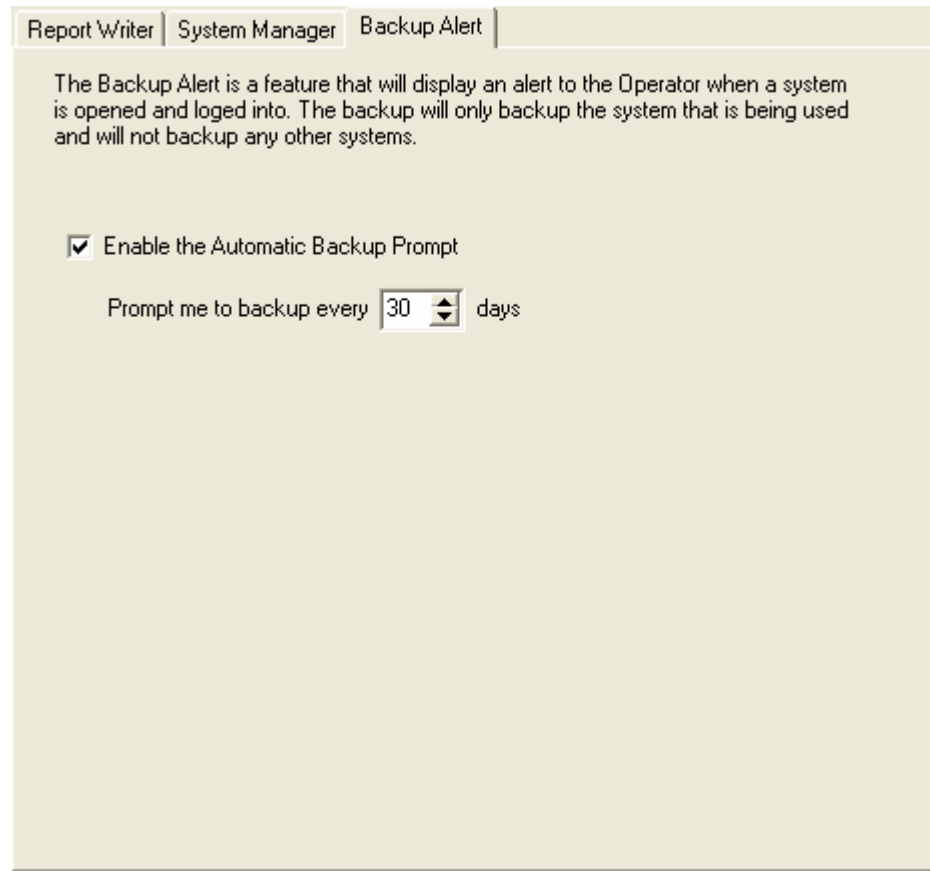
## System Manager

See section [System Manager](#) for a detailed description of the System Manager options

## Backup Alert

The Backup Alert is a feature that will prompt you to perform a backup of the data if you have not performed a backup in the time period that you specify. The backup alert will occur at the time you log into a system. If on a given day, you choose to decline backing up, you will not receive any more prompts that day, but you will receive the backup alert prompt each time you log into that particular system on each subsequent day until a backup is performed.

The delay period can be set from 1 - 365 days.



## General Options

### Auto Login

Enabling this option will cause the program to automatically attempt to log you in using a name and password you specify, whenever the login is displayed.

**NOTE:** This option should only be used if you are not worried that an unauthorized person will sit at your computer and attempt to access the SofLink Plus database and access codes. If you think there is a chance of this, then this option should be disabled immediately.

### Show Splash screen at program startup

Disabling this option not show the splash screen when the program is launched, thereby creating a slightly faster startup.

### Continue displaying the System Startup Tasklist even when all items are completed

Enabling this option will cause the cause the Tasklist to always remain visible, even when completed.

### Temporary Users will not automatically expire on controllers that do not support Temporary Users

Enabling this option will cause Users that are set up to expire, to gain access in controllers that don't support the Temporary User feature. Disabling this option will cause any Temporary Users to be exported to, but not gain access in those controllers that don't support Temporary Users.

The image shows a screenshot of a software configuration window with four tabs: 'Report Writer', 'System Manager', 'General Options', and 'Backup Alert'. The 'General Options' tab is selected. Inside this tab, there is a section titled 'Auto Login' which contains a checkbox labeled 'Enable Auto Login' (which is unchecked), followed by two text input fields labeled 'Login Name' and 'Login Password'. Below the 'Auto Login' section, there are three checkboxes with their respective labels: 'Show Splash screen at program startup' (checked), 'Continue displaying the System Setup Tasklist even when all items are completed' (unchecked), and 'Temporary Users will not automatically expire on controllers that do not support Temporary Users' (checked).

Report Writer | System Manager | **General Options** | Backup Alert

Auto Login

Enable Auto Login

Login Name

Login Password

Show Splash screen at program startup

Continue displaying the System Setup Tasklist even when all items are completed

Temporary Users will not automatically expire on controllers that do not support Temporary Users

## 9 Reports

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### 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 selecting the **Print** button.

see also:

[Log Filter](#)

[Misc. Log Reports](#)

[Assignment Reports](#)

[Database Printing](#)

[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 the following screen shot).

**Filtered Log**

**User Selection**

Single User

Access Level

All Users

**Date Range**

From: 7/22/2004 First Record

To: 7/22/2004 Last Record

No date filtering

**Door Selection**

- Bldg - 2a
  - Front
  - Dock
  - Garage
- Bldg - Main
  - Foyer
  - Elec Closet
  - Hangar
- Bldg - Warehouse
  - Side Entrance

**Event Selection**

- System - Auto Relock
- System - Auto Unlock
- System - Deadbolt Thrown - Locked
- System - Deadbolt Thrown - Unlocked
- System - Door Ajar
- System - Door Closed
- System - Event Log Retrieved
- System - Forced Door
- System - REX (Request to Exit)
- System - Unknown Event
- User - 1st IN Auto Unlock
- User - Access Denied - Bad Card/PIN Combo
- User - Access Denied - Bad Timezone
- User - Access Denied - Deadbolt Thrown
- User - Access Denied - Invalid PIN
- User - Access Denied - Unit Locked Down
- User - Access Denied - User Lockout Active
- User - Access Denied - User is Disabled
- User - Access Granted IN
- User - Comms. Unlocked - Import/Export
- User - Comms. Unlocked - Log Import
- User - Lockout OFF
- User - Lockout ON
- User - Log Erased
- User - Passage OFF
- User - Passage ON
- User - Program Mode Denied
- User - Program Mode Entered
- User - Relock
- User - Unit Locked Down
- Virtual - PDA to Cont. - Com Established
- Virtual - PDA to Cont. - Export Complete

Select All Doors    Print To:  Monitor     Print     No filtering at all, display the entire log    Select All Events

Select No Doors     Printer     File    Cancel    Select No Events

2. Specify the information to appear on the report on the Filtered Log screen. Enter the Users to be included in the report, specify the "From" and "To" date range, click the desired door to be included in the report; and check the desired events on the right-hand side (or use the "All" buttons). Only the records that match all the criteria will be displayed.
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. Select the **Print** button to print the report.

Date	Time	User	Site	Door	Event	Device SN
7/22/2004	4:05:00 PM	User Master	Bldg - 2a	Garage	User - Access Granted IN	1
7/22/2004	4:06:00 PM		Bldg - 2a	Garage	Virtual - PDA to Cont. - Com Established	1
7/22/2004	4:06:00 PM		Bldg - 2a	Garage	Virtual - PDA to Cont. - Export Complete	1
7/22/2004	4:06:00 PM	User Master	Bldg - 2a	Garage	System - Event Log Retrieved	1
7/22/2004	4:06:00 PM	User Master	Bldg - Warehouse	Side Entrance	User - Access Granted IN	1924222307
7/22/2004	4:07:00 PM	Clark Jeff	Bldg - 2a	Garage	User - Access Granted IN	1
7/22/2004	4:07:00 PM		Bldg - 2a	Garage	User - Access Denied - Invalid PIN	1
7/22/2004	4:07:00 PM		Bldg - Warehouse	Side Entrance	Virtual - PDA to Cont. - Com Established	1924222307
7/22/2004	4:07:00 PM		Bldg - Warehouse	Side Entrance	Virtual - PDA to Cont. - Export Complete	1924222307
7/22/2004	4:07:00 PM	User Master	Bldg - Warehouse	Side Entrance	System - Event Log Retrieved	1924222307
7/22/2004	4:07:00 PM	Clark Jeff	Bldg - Warehouse	Side Entrance	User - Access Granted IN	1924222307
7/22/2004	4:07:00 PM		Bldg - Warehouse	Side Entrance	User - Access Denied - Invalid PIN	1924222307
7/22/2004	4:08:00 PM		Bldg - 2a	Garage	User - Access Denied - Invalid PIN	1
7/22/2004	4:08:00 PM		Bldg - 2a	Garage	User - Access Denied - Invalid PIN	1
7/22/2004	4:08:00 PM	Rivet Rich	Bldg - 2a	Garage	User - Access Granted IN	1
7/22/2004	4:08:00 PM		Bldg - Warehouse	Side Entrance	User - Access Denied - Invalid PIN	1924222307
7/22/2004	4:08:00 PM		Bldg - Warehouse	Side Entrance	User - Access Denied - Invalid PIN	1924222307
7/22/2004	4:11:00 PM	User Master	Bldg - 2a	Garage	User - Access Granted IN	1
7/22/2004	4:12:00 PM		Bldg - 2a	Garage	Virtual - PDA to Cont. - Com Established	1
7/22/2004	4:12:00 PM		Bldg - 2a	Garage	Virtual - PDA to Cont. - Export Complete	1
7/22/2004	4:12:00 PM	User Master	Bldg - 2a	Garage	System - Event Log Retrieved	1
7/22/2004	4:15:00 PM	User Master	Bldg - Warehouse	Side Entrance	User - Access Granted IN	1924222307
7/22/2004	4:16:00 PM	Clark Jeff	Bldg - 2a	Garage	User - Access Granted IN	1
7/22/2004	4:16:00 PM		Bldg - 2a	Garage	User - Access Denied - Invalid PIN	1
7/22/2004	4:16:00 PM		Bldg - 2a	Garage	User - Access Denied - Invalid PIN	1
7/22/2004	4:16:00 PM		Bldg - Warehouse	Side Entrance	Virtual - PDA to Cont. - Com Established	1924222307
7/22/2004	4:16:00 PM		Bldg - Warehouse	Side Entrance	Virtual - PDA to Cont. - Export Complete	1924222307
7/22/2004	4:16:00 PM	User Master	Bldg - Warehouse	Side Entrance	System - Event Log Retrieved	1924222307
7/22/2004	4:16:00 PM	Clark Jeff	Bldg - Warehouse	Side Entrance	User - Access Granted IN	1924222307
7/22/2004	4:16:00 PM	1 Lockout	Bldg - Warehouse	Side Entrance	User - Lockout ON	1924222307
7/22/2004	4:17:00 PM		Bldg - 2a	Garage	Virtual - PDA to Cont. - Com Established	1
7/22/2004	4:17:00 PM	User Master	Bldg - 2a	Garage	User - Access Granted IN	1
7/22/2004	4:17:00 PM	User Master	Bldg - 2a	Garage	System - Event Log Retrieved	1

**NOTE:** The Log Filter report is best printed in 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 causing those events to not be displayed in the report. The report will be sorted by date and time.

#### No filtering at all, display the entire log

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, if someone attempted to use this user code to gain access, after the log was imported, an event would be displayed 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, 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# 0000# 0000# **` to delete system data and also `76# 0000# 0000# **` to delete transaction log data. Always refer to the programming manual that came with the controller for the commands.

## 9.3 Misc. Log Reports

The Misc. Log Reports can show:

- the first and last event that occurred each day
- what days a particular User was granted access
- who was granted access on a particular day

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.
3. Select the **Print** button to print the report.



## 9.4 Assignment Reports

The Assignment Reports screen allows you to select from 4 different report types. Each report type allows you to select the individual items that you want to include in the report. Report types include:

- Show the Access Levels that contain select doors
- Show the Users assigned to each door
- Show the Doors each User can access
- Show the Users assigned to each Access Level

To use this reporting tool, perform the following:

1. Select **Reports | Assignment Reports** from the SofLink Plus main menu to show the Assignment Report selection screen.
2. In the section of the screen labeled "Report Types", select which report type you want to generate.
3. Select the items you want to include in the report. Options that are specific to that report type are discussed in the following sections that describe the individual report types.
4. Specify the "Print To" output device for this report: Monitor (screen), Printer, or File.
5. Select the **Print** button to print the report to the selected output. If you selected File, you will be prompted to enter a name for the file in the "File name" field.

### "Show the Access Levels that contain select doors"

This report type can be helpful when you are adding users, and you have a large number of Access Levels. Simply select the doors on the left that you wish to add a user to. Each time you select or deselect a door on the left, Access Levels that contain all the selected doors will be displayed on the right.

#### Door Selection

Select the doors you want to filter Access Levels by

#### Matching Access Levels

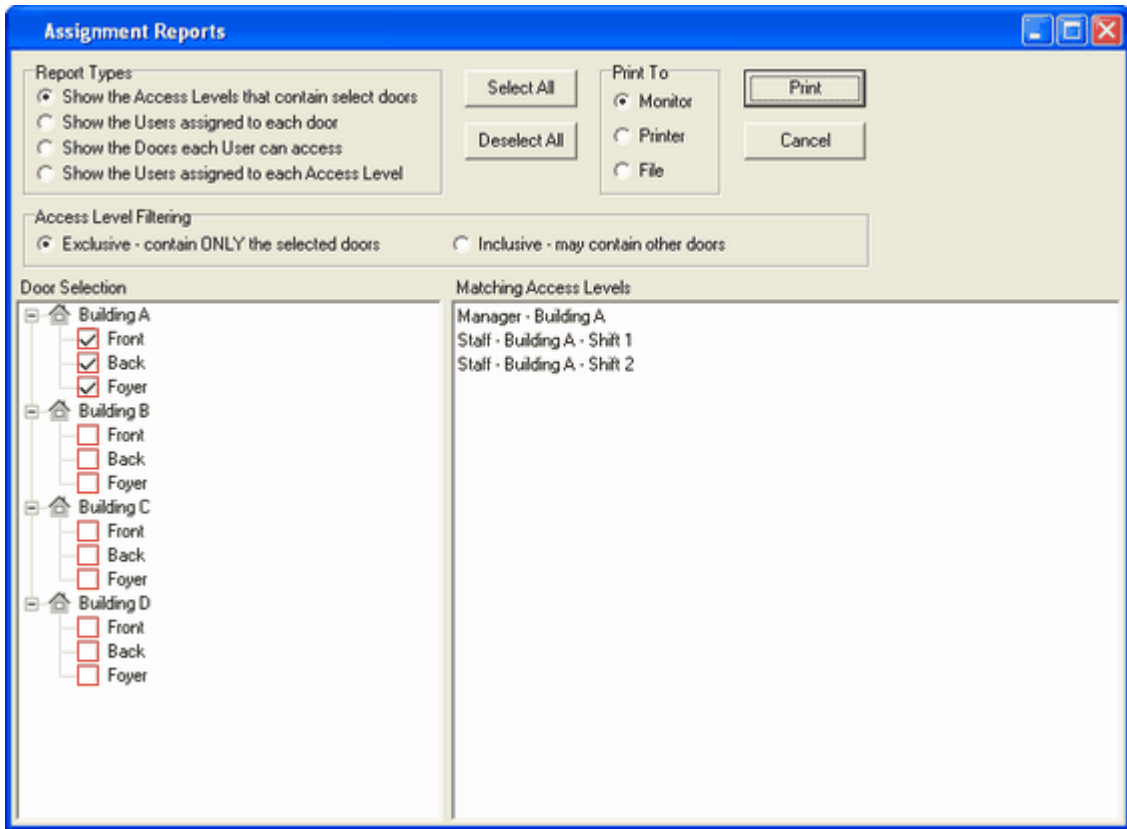
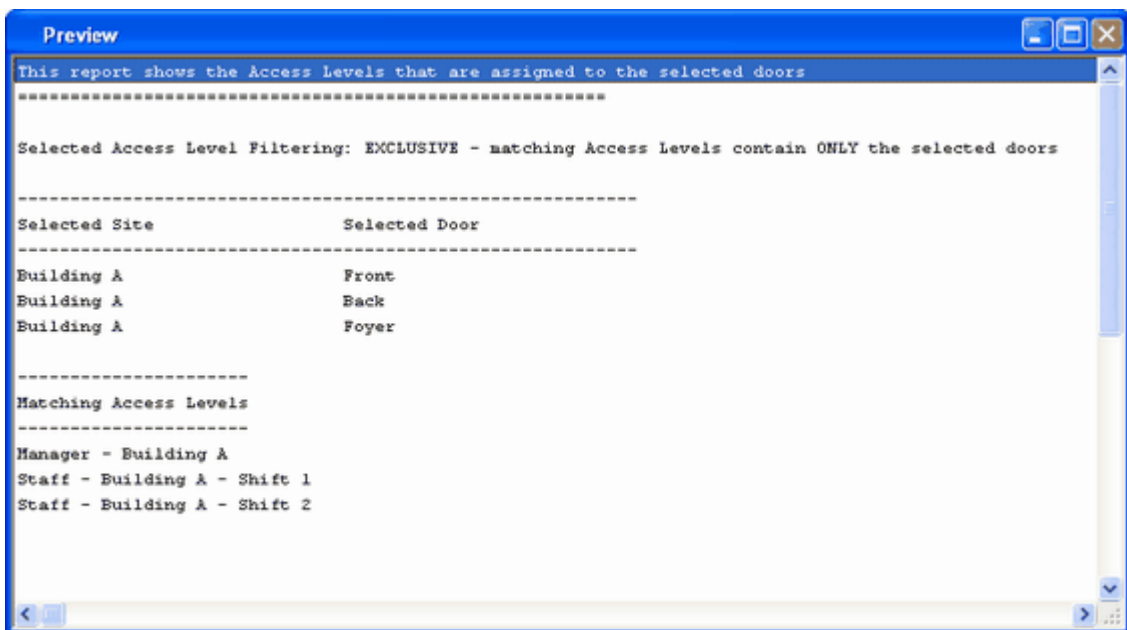
Displays the Access Levels that contain all the selected doors and also comply with the "Access Level Filtering" selection

**Access Level Filtering****Exclusive**

Displays matching Access Levels that grant access to **ONLY** the selected doors and no other doors

**Inclusive**

Displays matching Access Levels that grant access to all the selected doors, but may also grant access to other doors.

**Door Selection Screen****Print Report to Monitor**

## "Show the Users assigned to each door"

This report will display the users that are assigned to each of the selected doors. You have the option to not display particular data in the report, which can help you to distribute this report but still maintain security.

### Door Selection

Select the doors you want to include in the report

### Show these items in the user report

#### PIN Data

Disabling this option, will cause the PIN field to be replaced with an "X" (if that field contains data). In the previous sample report PIN data was disabled, so you will notice that all the data in the PIN fields are replaced by an X.

#### Card Data

Disabling this option, will cause the Card data fields to be replaced with an "X" (if any of those fields contain data).

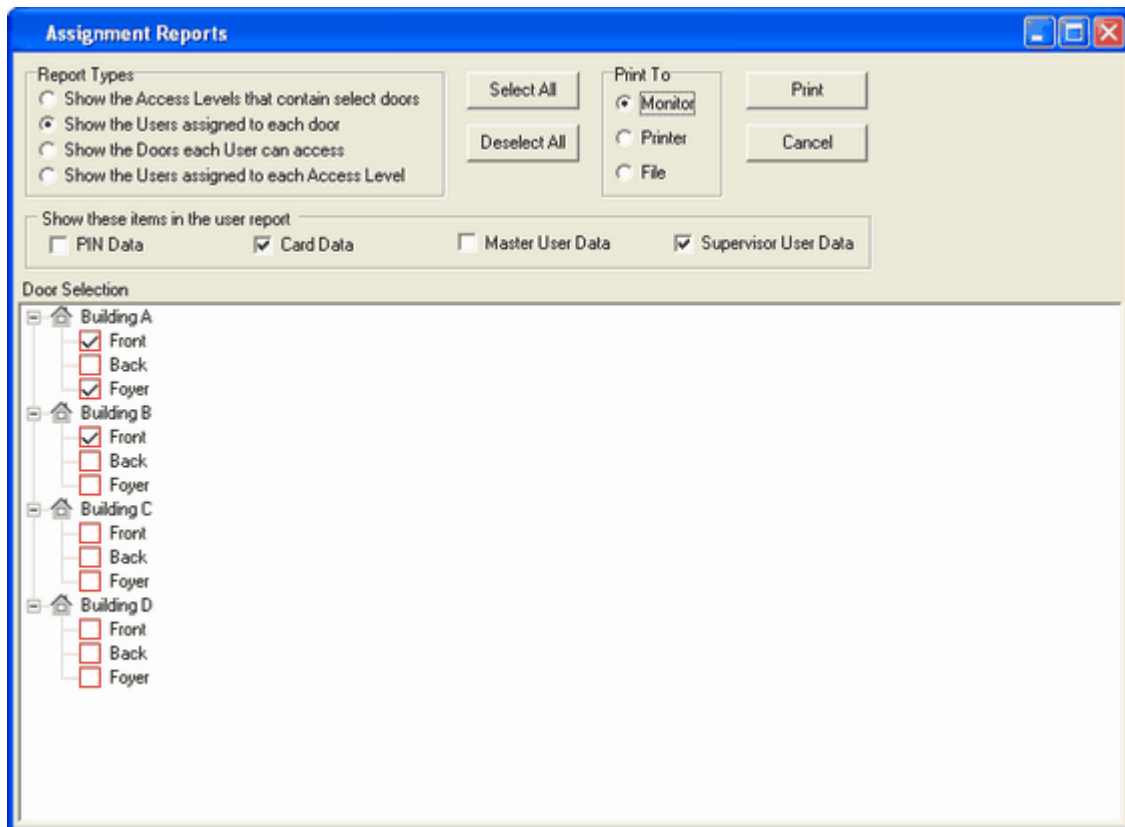
**NOTE:** If you include either PIN data or Card Data in this report, and the report is printed to a hard copy or saved to a file, be sure to keep the report in a secure location, since data in that report could potentially be used to gain access.

### Master User

Disabling this option will cause the PIN and Card data fields of the Master User to be replaced by an "X" (if any of those fields contain data). This can be helpful if you want to distribute this report to someone but you do not want that person to be able to enter programming mode manually.

### Supervisor User

Disabling this option will cause the PIN and Card data fields of the Supervisor User to be replaced by an "X" (if any of those fields contain data). This can be helpful if you want to distribute this report to someone but you do not want that person to be able to enter programming mode manually.



Door Selection Screen

This report shows the users assigned to the selected doors

```

=====
ID                               : 5
Name                             : Back
Address                           : 2
Type                              :
Site                              : Building A
=====
Assigned users
=====
#   User ID  First Name      Last Name      PIN   Card   Site Card-Num
-----
1   5001     Master          User           X
2   5002     Supervisor      User           X   898   11   0006160705
3   5003     Ann             Kosch          X
4   5004     Bob             Owens          X
5   5005     Dave            Bollman        X   64674 11   000617F944
6   5006     Eric            Sweet          X
7   5007     Jan             Presley        X
8   5008     Jay             Alloway        X   989   11   00061607BB
9   5009     Anthony         Phillips       X
10  5010     Chad            Bennett        X
11  5011     Ken             Conrow         X
12  5012     Marin           Doulin         X   676   11   0006160549
13  5013     Sandgren        Nicias         X
14  5014     Sandström      Anna           X
15  5019     Bergholm       Fredrik        X   556   11   0006160459
16  5020     Bethany         Krueger        X
17  5021     Blomberg        Anna           X
18  5022     Mattsson        Ken            X
19  5023     Michael         Hellwich       X
20  5024     Betsy           Edwards        X   0096  11   00061600C1
21  5025     John            McDonald       X
22  5026     Roberta         Walburn        X
=====
User Capacity Filled: 22 of 2000 users
=====

```

### Print Report to Monitor

### "Show the Doors each User can access"

This report will display the Doors and Time Zones that each of the selected users can access. This report can help you decide if the Access Level you have assigned to this user is the best choice, based upon the doors that user has access to.

### User Selection

Select the Users you want to include in this report

**Assignment Reports**

Report Types

- Show the Access Levels that contain select doors
- Show the Users assigned to each door
- Show the Doors each User can access
- Show the Users assigned to each Access Level

Select All      Deselect All

Print To

- Monitor
- Printer
- File

Print      Cancel

User Selection

Selected	Last Name	First Name	Unique User ID
<input checked="" type="checkbox"/>	Alloway	Jay	8
<input type="checkbox"/>	Anders	Andersson	32
<input checked="" type="checkbox"/>	Anna	Sandström	14
<input type="checkbox"/>	Anna	Blomberg	21
<input type="checkbox"/>	Anna-Karin	Tomberg	36
<input checked="" type="checkbox"/>	Arnold	Pears	27
<input type="checkbox"/>	Bennett	Chad	10
<input type="checkbox"/>	Bollman	Dave	5
<input type="checkbox"/>	Christian	Tschudin	37
<input type="checkbox"/>	Conrow	Ken	11
<input type="checkbox"/>	Dowlin	Marin	12
<input type="checkbox"/>	Edwards	Betsy	24
<input type="checkbox"/>	Evans	Janet	33
<input type="checkbox"/>	Fredrik	Bergholm	19
<input type="checkbox"/>	Hellwich	Michael	23
<input type="checkbox"/>	Jonas	Persson	28
<input type="checkbox"/>	Ken	Mattsson	22
<input type="checkbox"/>	Konstantinos	Sagonas	18
<input type="checkbox"/>	Kosch	Ann	3

User Selection Screen

**Preview**

This report shows the doors that each user has access to

```

-----
Site Name                Door Name                Time Zone
-----
Alloway, Jay
  Building A              Back                     24 Hour
  Building A              Foyer                   24 Hour
  Building A              Front                   24 Hour
  Building B              Back                     24 Hour
  Building B              Foyer                   24 Hour
  Building B              Front                   24 Hour
  Building C              Back                     24 Hour
  Building C              Foyer                   24 Hour
  Building C              Front                   24 Hour
  Building D              Back                     24 Hour
  Building D              Foyer                   24 Hour
  Building D              Front                   24 Hour
-----
Anna, Sandström
  Building A              Back                     24 Hour
  Building A              Foyer                   24 Hour
  Building A              Front                   24 Hour
-----
Arnold, Pears
  Building B              Back                     Shift 1 M-F
  Building B              Foyer                   Shift 1 M-F
  Building B              Front                   Shift 1 M-F
  
```

Print Report to Monitor

## "Show the Users assigned to each Access Level"

This report will display all the Users that are assigned to each of the selected Access Levels.

### Access Level Selection

Select the Access Levels you want included in the report

**Assignment Reports**

Report Types

- Show the Access Levels that contain select doors
- Show the Users assigned to each door
- Show the Doors each User can access
- Show the Users assigned to each Access Level

Select All      Deselect All

Print To

- Monitor
- Printer
- File

Print      Cancel

Access Level Selection

Selected	Access Level Name	Unique ID
<input type="checkbox"/>	ALL ACCESS 24/7	1
<input checked="" type="checkbox"/>	Manager - Building A	3
<input checked="" type="checkbox"/>	Manager - Building B	4
<input type="checkbox"/>	Staff - Building A - Shift 1	5
<input checked="" type="checkbox"/>	Staff - Building A - Shift 2	6
<input type="checkbox"/>	Staff - Building B - Shift 1	7
<input type="checkbox"/>	Staff - Building B - Shift 2	8

Access Level Selection Screen

**Preview**

This report shows the Users that are assigned to each Access Level

```

=====
Access Level Name      Last Name      First Name
-----
Manager - Building A
                    Anna          Sandström
                    Bennett       Chad
                    Conrow        Ken
                    Dowlin       Marin
                    Niclas       Sandgren
                    Phillips     Anthony
-----
Manager - Building B
                    Konstantinos  Sagonas
                    Luten        Melanie
                    Paul         Pettersson
                    Woods        Matthew
-----
Staff - Building A - Shift 2
                    Edwards      Betsy
                    McDonald   John
                    Walburn     Roberta

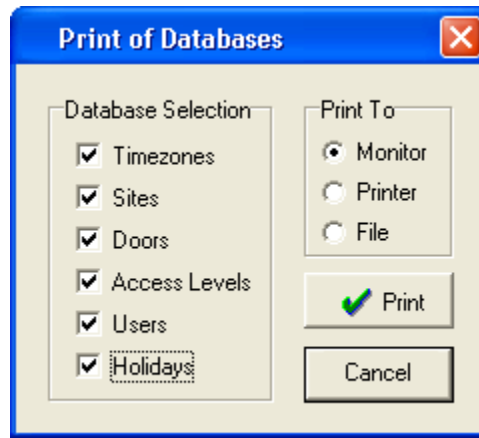
```

## Print Report to Monitor

### 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.

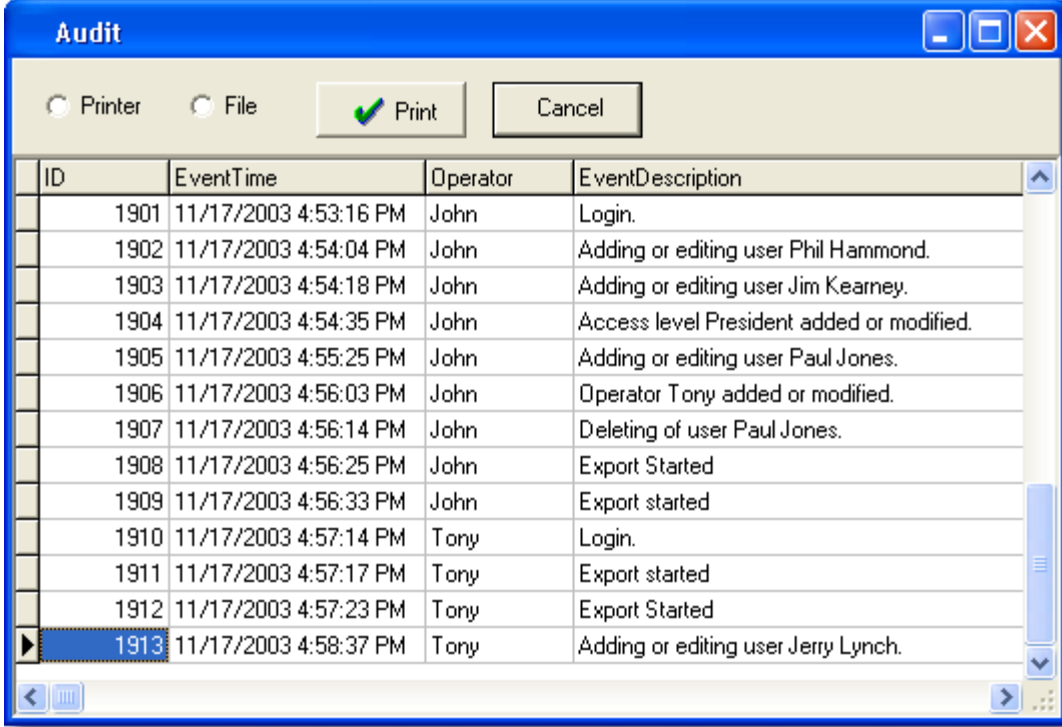
1. Select **Reports | Database** from the SofLink Plus main menu. The Database screen displays.
2. Specify the information to appear on the report on the Database screen. You can select the contents of these databases: Time Zones, sites, doors, access levels, users, and holidays.
3. Specify the desired 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. Select 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. Select the **Print** button to print the report.

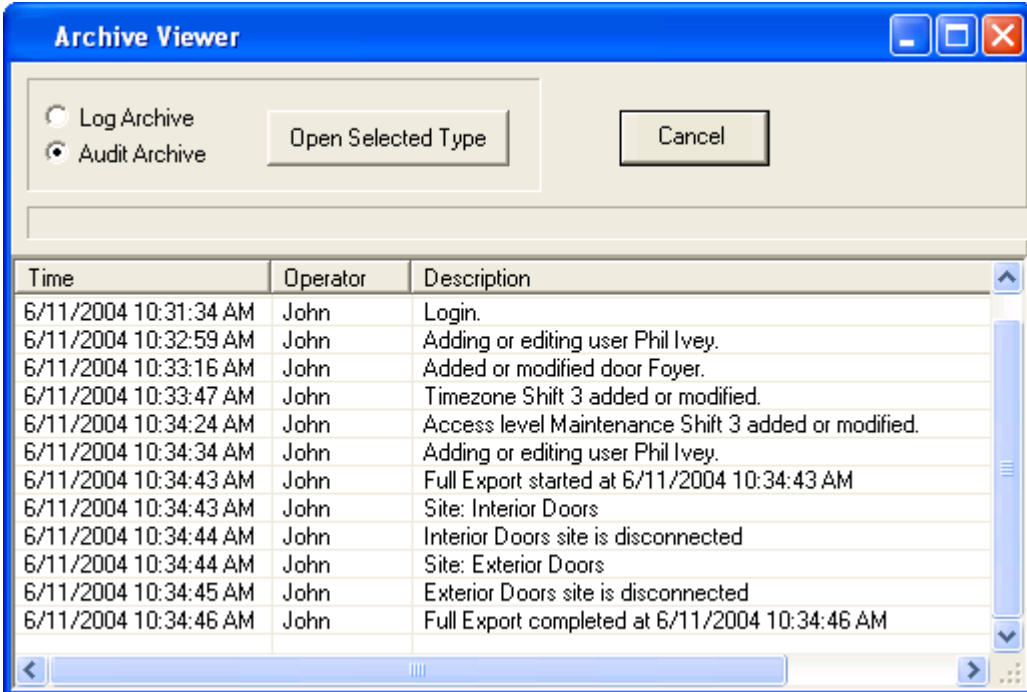


ID	EventTime	Operator	EventDescription
1901	11/17/2003 4:53:16 PM	John	Login.
1902	11/17/2003 4:54:04 PM	John	Adding or editing user Phil Hammond.
1903	11/17/2003 4:54:18 PM	John	Adding or editing user Jim Kearney.
1904	11/17/2003 4:54:35 PM	John	Access level President added or modified.
1905	11/17/2003 4:55:25 PM	John	Adding or editing user Paul Jones.
1906	11/17/2003 4:56:03 PM	John	Operator Tony added or modified.
1907	11/17/2003 4:56:14 PM	John	Deleting of user Paul Jones.
1908	11/17/2003 4:56:25 PM	John	Export Started
1909	11/17/2003 4:56:33 PM	John	Export started
1910	11/17/2003 4:57:14 PM	Tony	Login.
1911	11/17/2003 4:57:17 PM	Tony	Export started
1912	11/17/2003 4:57:23 PM	Tony	Export Started
1913	11/17/2003 4:58:37 PM	Tony	Adding or editing user Jerry Lynch.

## 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.



Time	Operator	Description
6/11/2004 10:31:34 AM	John	Login.
6/11/2004 10:32:59 AM	John	Adding or editing user Phil Ivey.
6/11/2004 10:33:16 AM	John	Added or modified door Foyer.
6/11/2004 10:33:47 AM	John	Timezone Shift 3 added or modified.
6/11/2004 10:34:24 AM	John	Access level Maintenance Shift 3 added or modified.
6/11/2004 10:34:34 AM	John	Adding or editing user Phil Ivey.
6/11/2004 10:34:43 AM	John	Full Export started at 6/11/2004 10:34:43 AM
6/11/2004 10:34:43 AM	John	Site: Interior Doors
6/11/2004 10:34:44 AM	John	Interior Doors site is disconnected
6/11/2004 10:34:44 AM	John	Site: Exterior Doors
6/11/2004 10:34:45 AM	John	Exterior Doors site is disconnected
6/11/2004 10:34:46 AM	John	Full Export completed at 6/11/2004 10:34:46 AM

2. Specify the desired type of Archive report, "Log" or "Audit" and select 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 Data for External Report Writer

This option will start the Report Writer Database Copy.

See Tools | [Options](#) for details on the 'Generate Report Database' option.

## 9.9 Scheduled Log Import Errors

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. After viewing the errors, the errors 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 or other access credential stored in the card field that is used to perform an action on a door controller. The card number is read electronically by a card reader. (This definition also applies to Magnetic (ABA Track II) cards, Proximity cards, RF Fobs and Dallas 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 of 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 "Master User".

**Operator** Person who is using the SofLink Plus and System Manager software.

**PIN** Acronym for Personal Identification Number. See Code Number.

**System Administrator** Operator responsible for managing the access control system.

**System Dataset (aka Dataset or System)** A 'System Dataset' is a compressed zip file that stores all the data that is related to that particular System, currently including (but not limited to) the complete contents of the following folders: Archive, Backup, Database, Gateway, Maps, PDAFiles, Print, and ReportDB.

**System Manager** System Manager is a program that is responsible for accessing the System Repository and loading System datasets onto the local PC. System Manager also sends that same dataset back to the System Repository.

**System Repository (aka Repository, or Repository folder)** A 'System Repository' is a folder that can store any number of System Datasets. Any number of System Repository folders can be created based upon your security needs. All systems stored in that repository can be accessed by any installation of System Manager that has network privileges to see that particular System Repository folder.

## 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).

Access	Feature Description
	Login - Enables you to use this program
	Logout - This program remains active, but nobody can use the program until the next login
Enabled	Change Password - Enables you to change the password of currently logged operator
	Exit - Closes this program immediately
Full	Timezones - Manages timezones table
Full	Sites - Manages Sites table
Full	Doors - Manages Doors table
Full	Access Levels - Manages user rights to access doors
Full	Users - Manages Users table
Full	Holidays - Manages Holidays table
Full	Operators - Manages rights to use this program
Enabled	Import Log - Gets transaction logs from doors
Enabled	Import Log From All Sites - Gets transaction logs from all doors at all sites

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 or contact SARGENT at 800-810-WIRE (9473).

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

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### 12.1 Copyright Information

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