DSX Access Systems, Inc.

WinDSX

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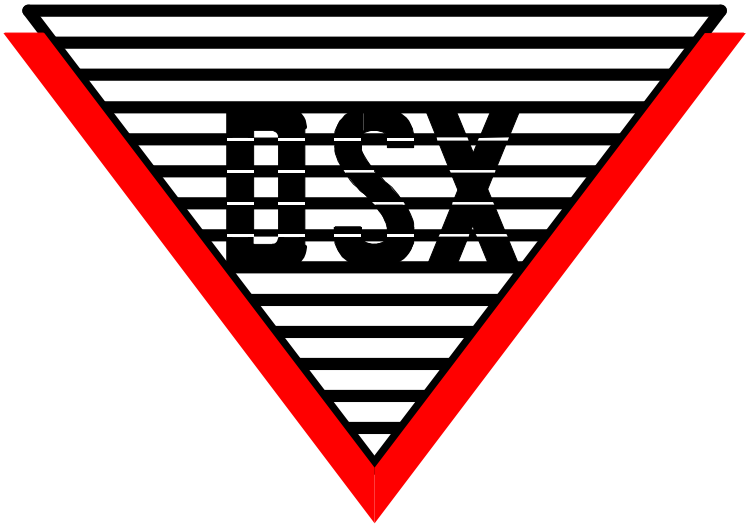

WinDSX User's Guide

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DSX, Our Commitment to Service

Our Commitment to service is continually demonstrated through our Training Programs and Technical Support Department. DSX stands behind its products and customers and constantly strives for excellence.

Our technical staff consists of engineers with field installation and service experience that are always ready to answer any question. By providing a staff with years of security experience, DSX is able to offer valuable insight into the complex issues that face the security contractor installing DSX equipment. DSX commitment to service is unmatched in the security industry.

Information contained in this document was known to be true at the time of printing. This information is subject to change at any time without notice. This document is a Team effort by the Technical Support Group at DSX.

Intent of this User Guide is to assist the actual user of the system in their daily operations. This Guide is a supplement to the extensive Help system integrated into the software. Help is available by pressing **F1**.

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The use of or reference to the term's Eltron, Fargo, Nisca, Pentium, Penware, Windows and Windows NT may or may not be the registered trademarks of the respective companies.

Compliance

You must consult your local fire codes before installing any locking device on doors, gates, or barriers. A construction and fire approval permit may be required before installing any equipment. Call your local Fire Marshall for building code requirements in your area.

For UL installations, you must install the DSX System according to the UL Installation Manual and in accordance with the National Electric Code, ANSI / NFPA 70 regulations and recommendations for US Installations. Canadian installations must be in accordance with the Canadian Electric Code C22.1.

The DSX-1022, DSX-1040CDM, DSX-1040PDM, DSX-1042, DSX-1043, DSX-1044, DSX-CKI-C, DSX-CKI-K, DSX-DP485 and DSX-FRB8 have been tested and found to conform to the requirements of UL 294.

The DSX-1022, DSX-1040CDM, DSX-1040PDM, DSX-1042, DSX-1043, DSX-1044, DSX-1040-PE-B, DSX-MCI, DSX-LAN, DSX-SPS and DSX-2PC have been tested and found to conform to the requirements of UL 1076.

Camera and DVR integration was not tested by UL.

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Startup

→ **DataBase** → **Page 2**

The Database program is the very core of the system. It is where the system is defined and configured. Database manages all of the system data and provides the user with an easy but dynamic graphical user interface. The database program not only houses the data entry mechanism but also contains all system management utilities including Photo ID Badging.

→ **Workstation** → **Page 85**

The Workstation program is the actual user interface for all communications and controller interaction in the system. There are four interactive windows within the workstation program. These four windows are all sizeable with scroll bars to allow customizing of the desktop for ease of use. The four Windows are Alarm, Event, Selection, and Control.

→ **Comm Server** → Comm Server is started and closed by the Workstation program

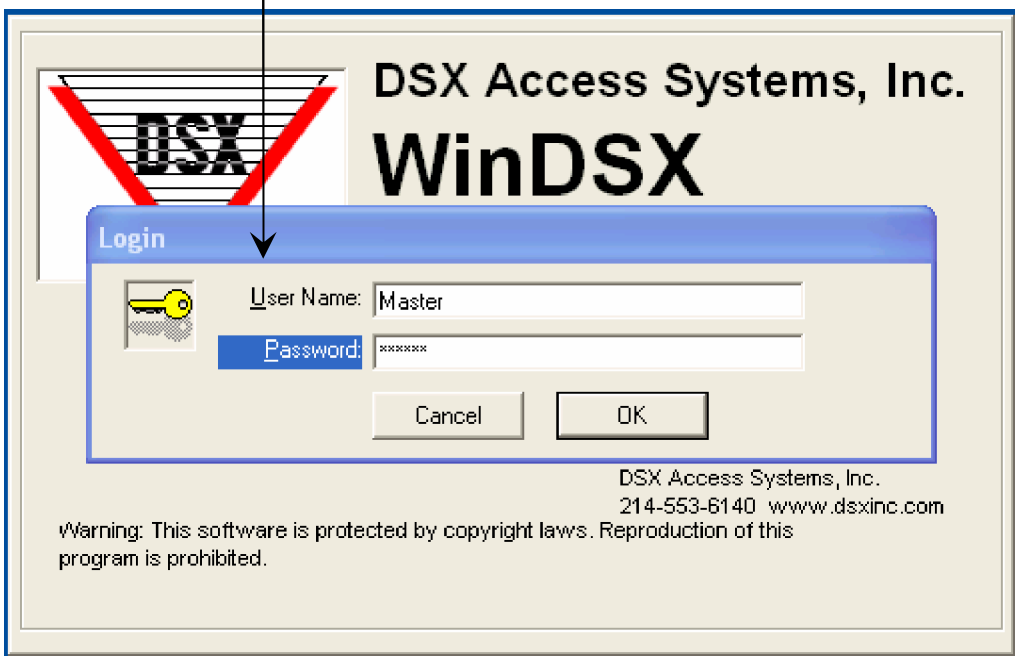
The Comm Server program is a 32 Bit, multi-tasking, communication application that runs as a Process and is located on the PC that has the physical and/or virtual connection to the DSX Controllers. The Comm Server has no user interface, it simply communicates with the DSX Controllers, downloading new data, uploading panel history, and logging all transactions to the hard disk. The Workstation program interrogates the Comm Server program through the network using the Comm Servers TCP/IP address. The Comm Server Program responds to the Workstation requests and routes all alarm, input/output control and system events to the Workstation Program.

Press F1 for Help Help can be received by pressing the F1 key from any Menu and Data-Entry Screen in the DataBase program and from any location in the Workstation Program.

Login

Double Click on the **DataBase** ICON to start the program.

The Login Screen below is displayed when the program is started. Enter your User Name and Password. The Default User Name is **master**, the default Password is **master** both entered in all lower case.



ToolBar & Menus

File – Select File to access the following:
Change Operator Password – The operator always has access to change their Password.
Enable Multiple Selections – For multiple card holder selections to be used with the Activate/De-activate and Print Card Buttons.
Exit – Select Exit to leave the program.

Operator Log Off – Click here to Log Off and Return to the Login Screen.

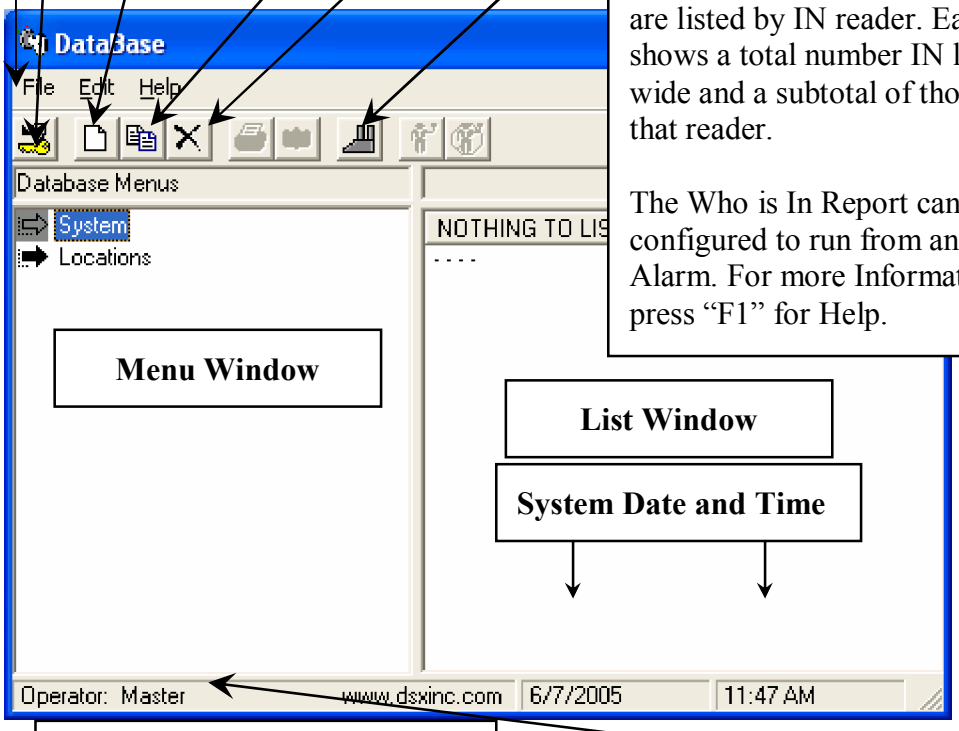
Copy – Click here after selecting a data record that you wish to copy.

Delete – Click here after selecting a data record you wish to delete.

Add – Click here to add new record.

Who Is In Report – Click here to receive a detailed report as to who is in the facility and where they last used their card. Card Holders are listed by IN reader. Each list shows a total number IN location wide and a subtotal of those IN at that reader.

The Who is In Report can be configured to run from an Input Alarm. For more Information press "F1" for Help.



Menu Window

List Window

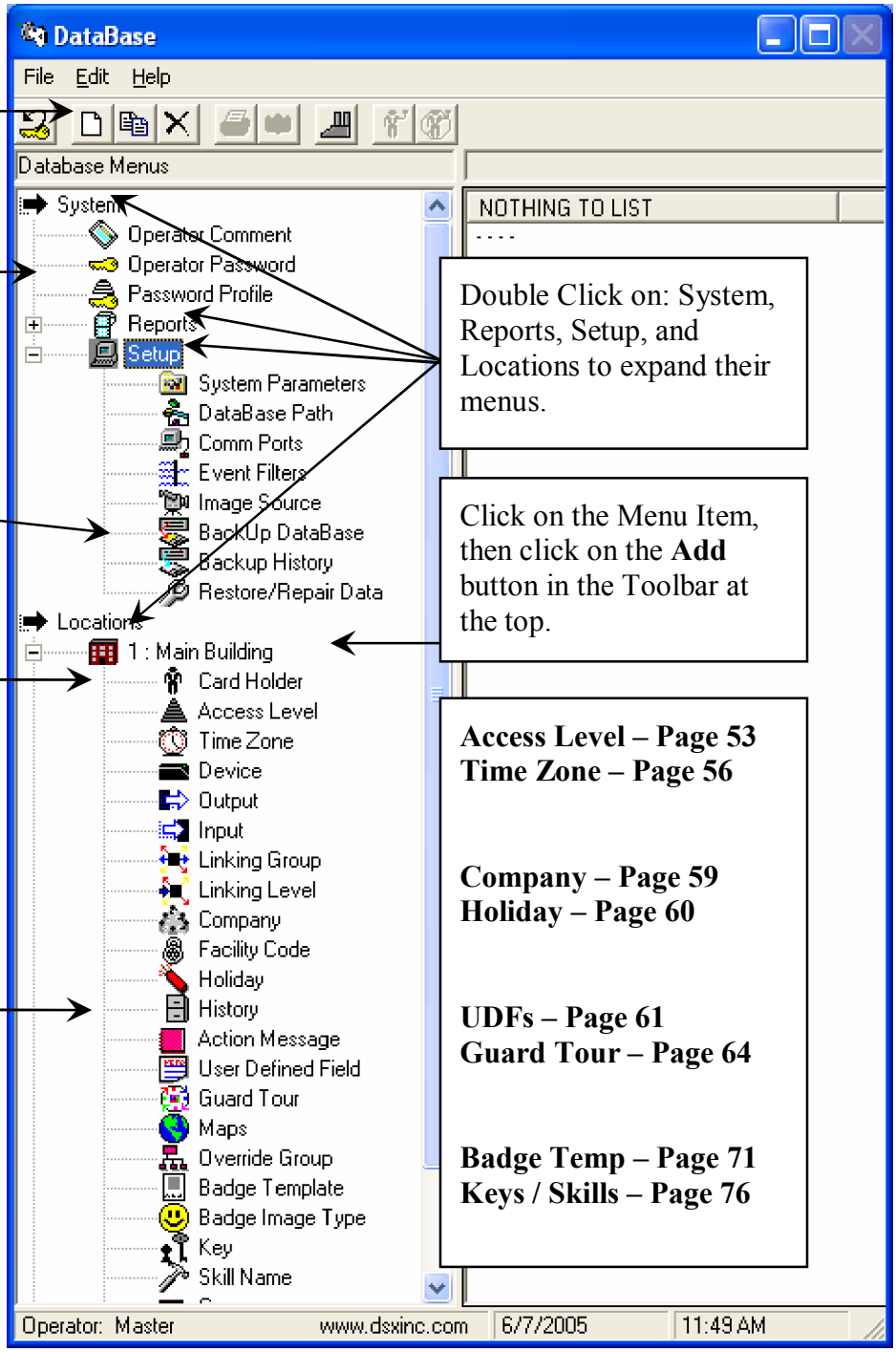
System Date and Time

Double Click on Locations to expand the menu to display all locations defined in the system.

The **User Name** of the Operator Logged onto the System is displayed here.

Double Click on System to expand the menu to display Passwords, Reports, and Setup.

Menus Map



Add button

Operator Passwords and Configuration, Page 6

DataBase and History Backup Utilities, Page 23

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Double Click on: System, Reports, Setup, and Locations to expand their menus.

Click on the Menu Item, then click on the **Add** button in the Toolbar at the top.

Access Level – Page 53
Time Zone – Page 56

Company – Page 59
Holiday – Page 60

UDFs – Page 61
Guard Tour – Page 64

Badge Temp – Page 71
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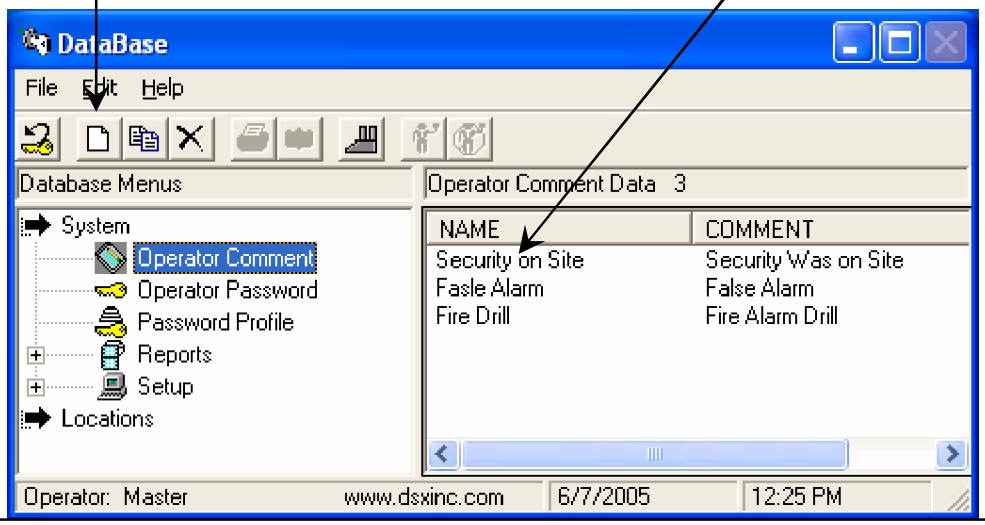
Operator Comments

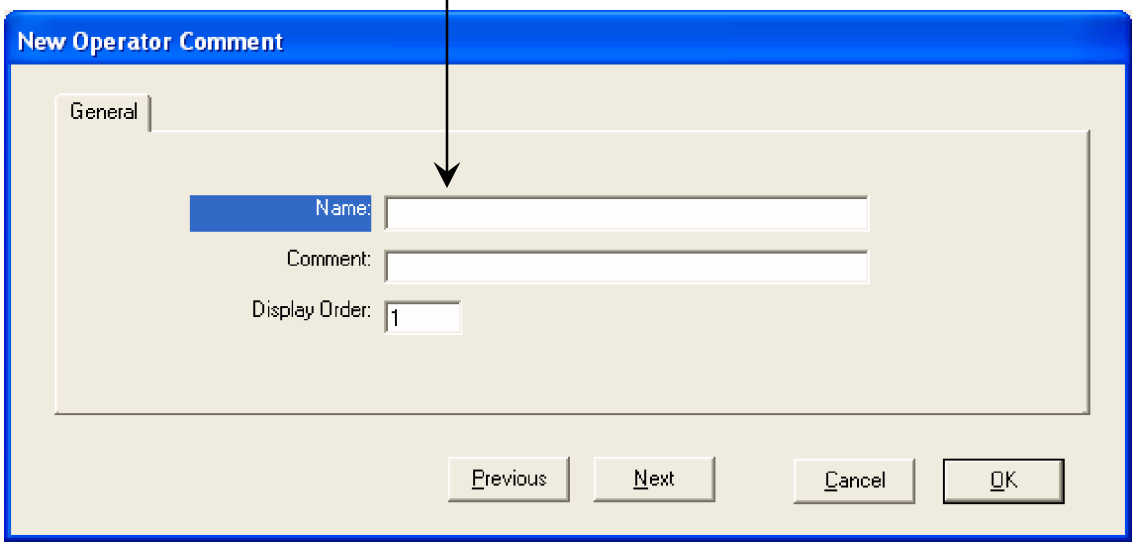
Operator Comments are notes or text that can be recorded by the operator at any time. These comments can be made and stored in history for future retrieval. The comments can be in response to an alarm or restoral or any other incident. Predefined statements or comments can be described here and later used by the operator. Free format comments can also be used instead of or in conjunction with the predefined comments. Predefined Operator Comments can be used for consistent recording of a common or recurring situation.

Click on **Operator Comment** in the Menu then on **Add**.

Double Click here to **Edit** an existing Operator Comment.



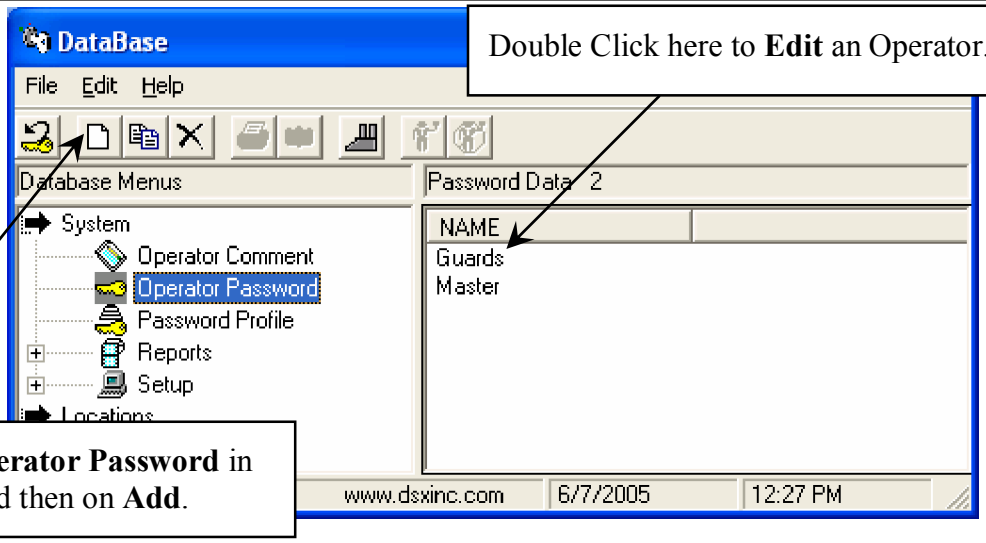
1. Enter the **Name** of the Comment as it will be referred to and selected by.
2. Enter the **Comment** to be displayed and recorded.
3. Enter the **Display Order**, which determines its order in the comment pick list.



Operator Password

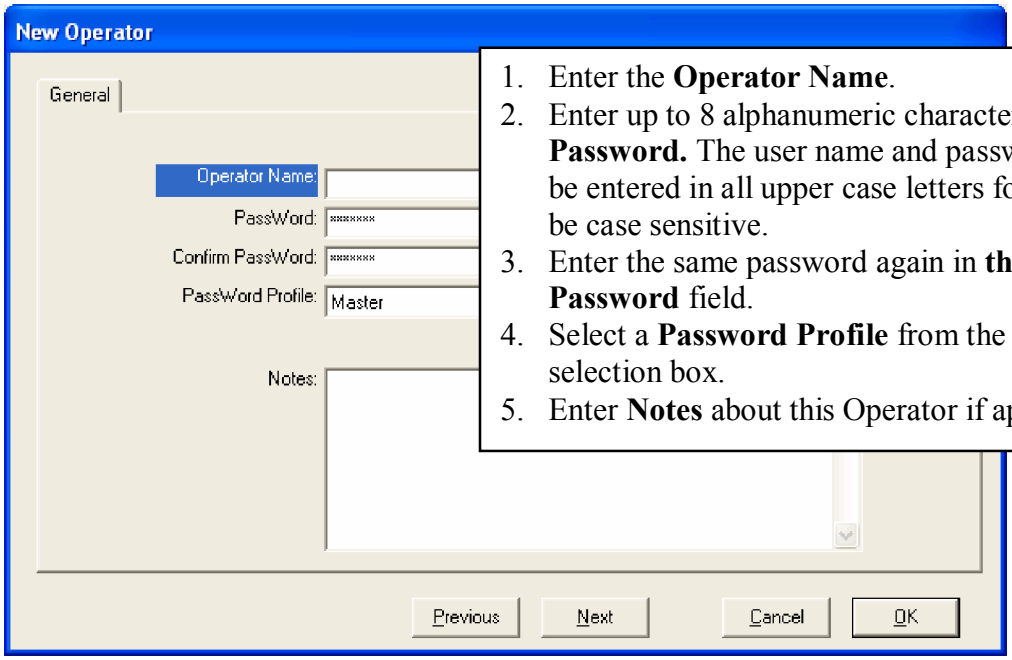
Operator Passwords is the mechanism that secures the system from unauthorized use. The Operator Passwords are unique to each operator providing the operators the same use of the system regardless of which workstation they are at. Each operator has a Password Profile that determines what privileges the operator has in the software. Each operator can have their own Password Profile or multiple operators can share a profile. The Operator must enter their Password when starting the system and must log off when leaving the workstation.

This method of password protection allows the manager to add the operator into the system and assign them the appropriate password profile, and an initial password. The operator is given their login name and password profile at which time they can change their password to one they only know. Once this is done the manager can go back and modify the login name and profile without viewing or changing the password.



Double Click here to **Edit** an Operator.

Click on **Operator Password** in the Menu and then on **Add**.



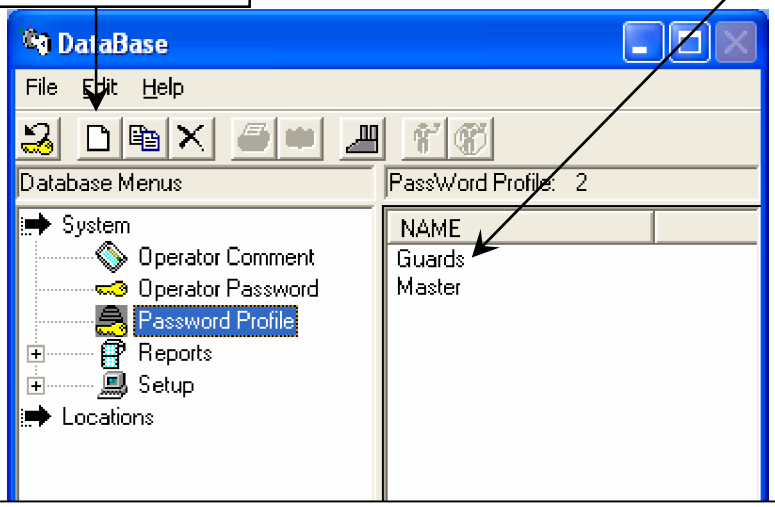
1. Enter the **Operator Name**.
2. Enter up to 8 alphanumeric characters for a **Password.** The user name and password must be entered in all upper case letters for them to be case sensitive.
3. Enter the same password again in **the Confirm Password** field.
4. Select a **Password Profile** from the drop down selection box.
5. Enter **Notes** about this Operator if applicable.

Password Profiles

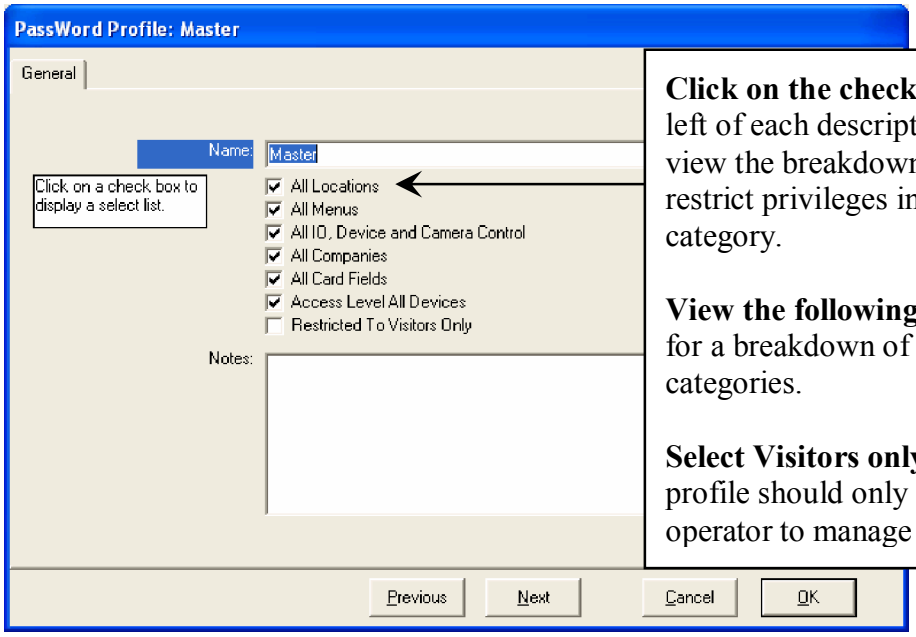
Password Profiles are the describing elements of where a password is valid and what it is valid for. Custom profiles can be created for each Operator or can be shared by more then one Operator.

Click on **Password Profile** in the Menu and then on **Add.**

Edit a Profile - Double Click on the selected **Profile**



New **Password Profiles** have rights to nothing by default, indicated by no checkmarks in the column of selection boxes below. By clicking in the box you place a checkmark and provide full rights to that selection. By clicking on the checkmark you take it away which takes you to the selection menus and break down for that listing.



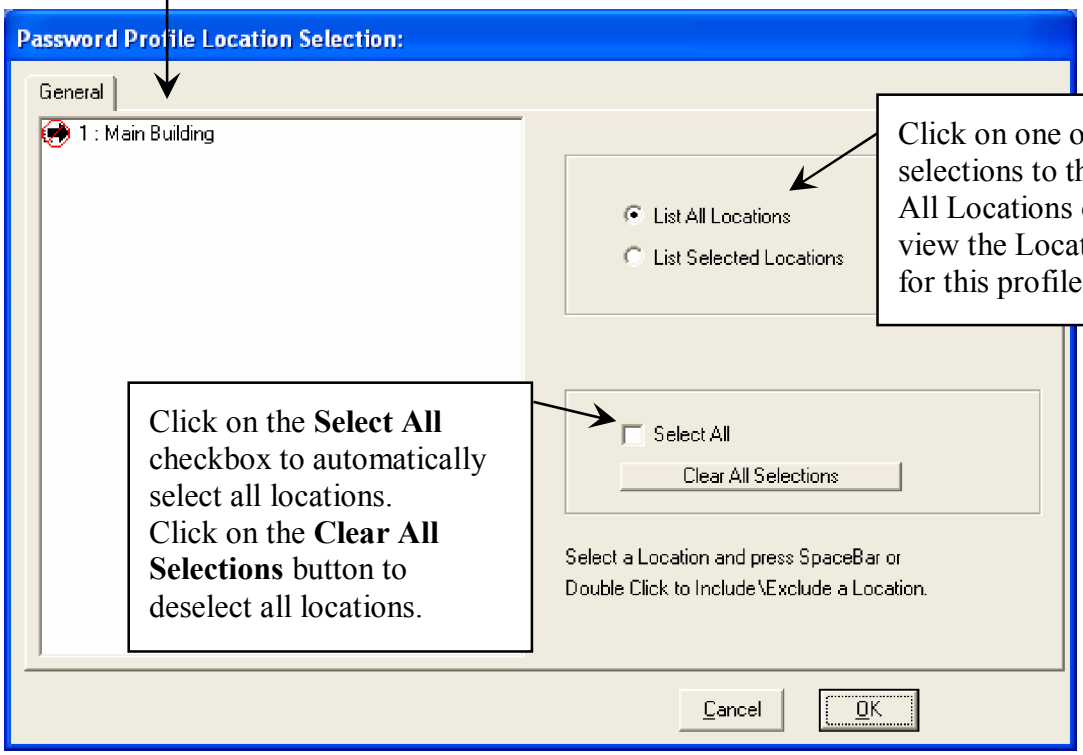
Click on the checkbox to the left of each description to view the breakdown of, and restrict privileges in, each category.

View the following pages for a breakdown of all 6 categories.

Select Visitors only if this profile should only allow the operator to manage visitors.

Profiles – All Locations

Use the **Location List** below to determine which locations this password profile will be valid for. Select the Locations this Password should work at. **Select a Location and press the Space Bar or Double Right Click to include or exclude a location.**

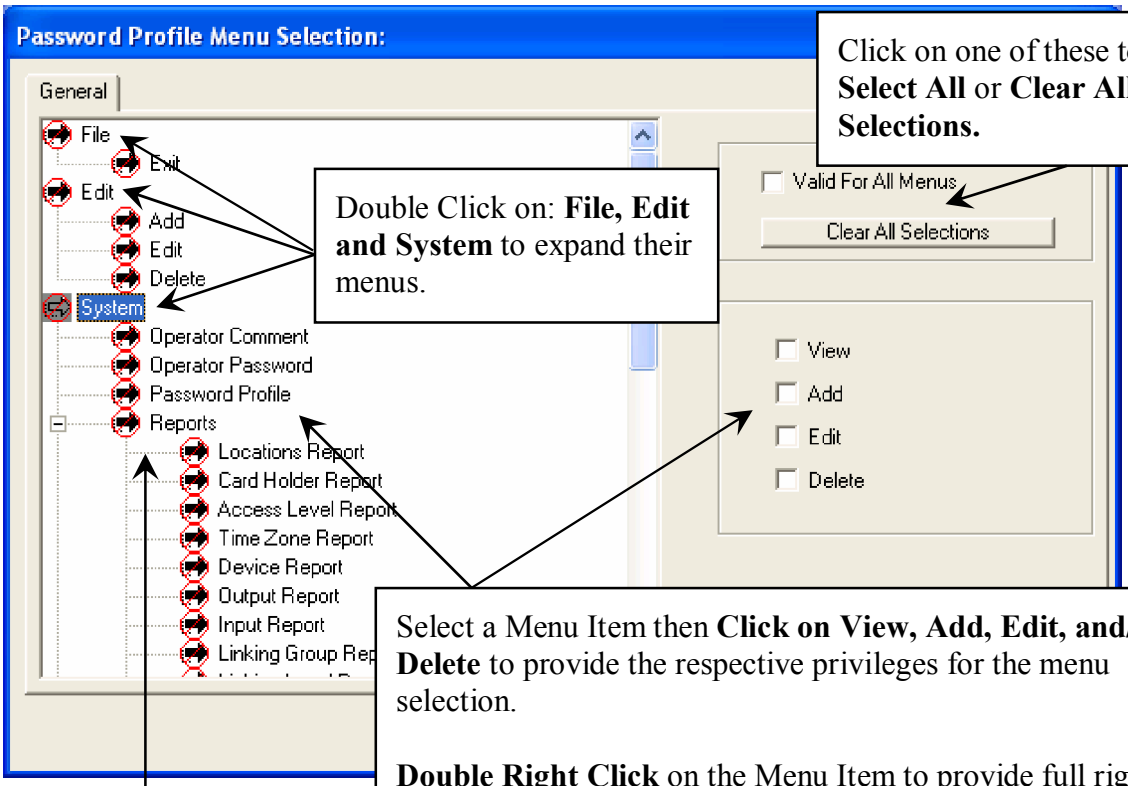


Click on one of the selections to the left to view All Locations or to only view the Locations selected for this profile.

Click on the **Select All** checkbox to automatically select all locations.
Click on the **Clear All Selections** button to deselect all locations.

Profiles – All Menus

All Menus is where menu items and functions, for which this Password Profile will be valid, are selected. Items selected here are accessible to a password with this profile. This answers the question of what functions this Password is allowed to perform. Select the items from the list corresponding to what this profile should be valid for and have access to.



Click on one of these to **Select All** or **Clear All Selections.**

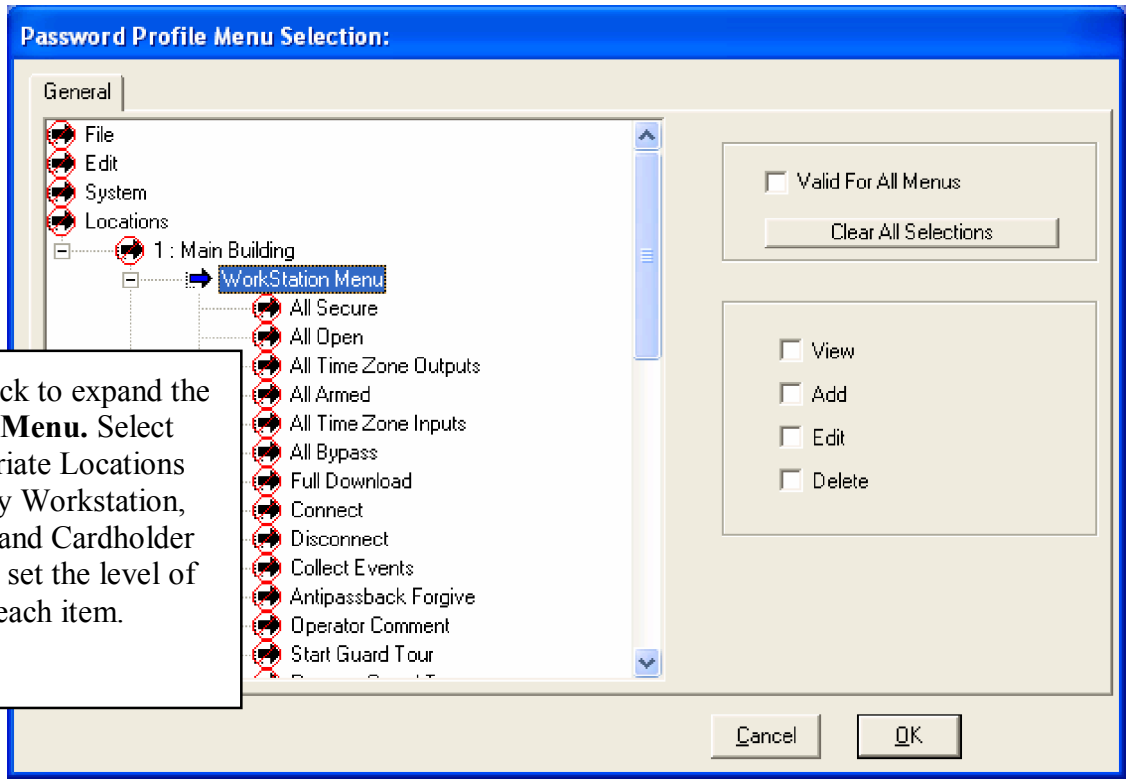
Double Click on: **File, Edit and System** to expand their menus.

Select a Menu Item then **Click on View, Add, Edit, and/or Delete** to provide the respective privileges for the menu selection.

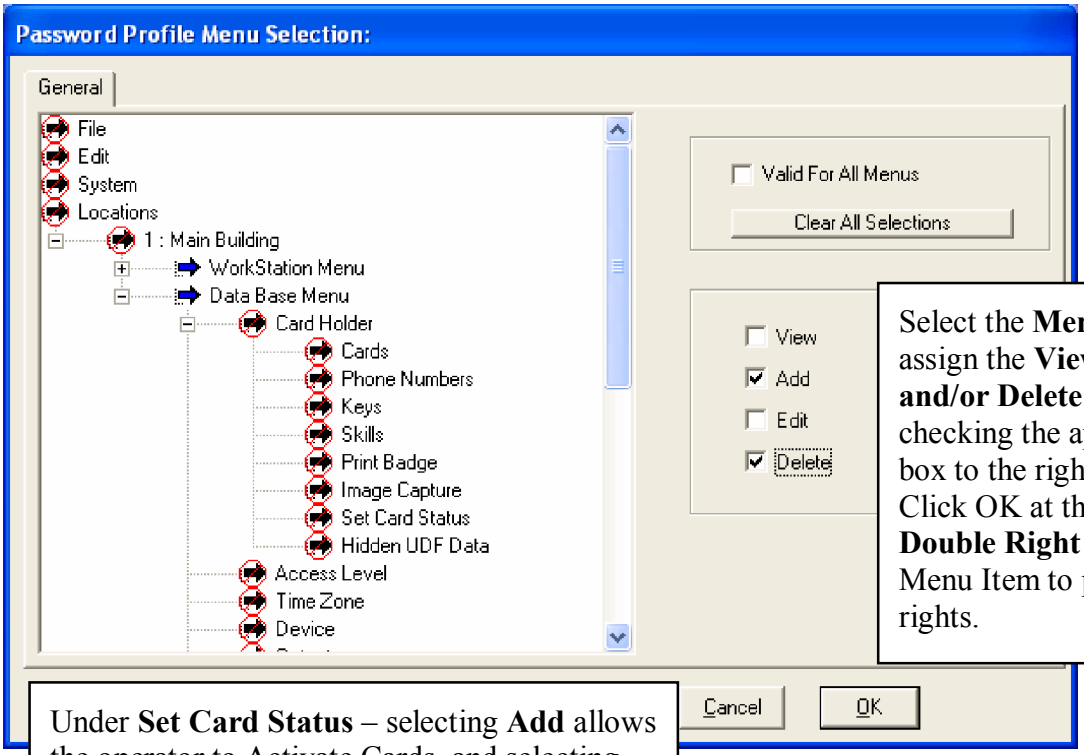
Double Right Click on the Menu Item to provide full rights.

Double Click on **Reports** to expand the menu to display all of the system reports available. Select all reports this profile should have access to.

Profiles – All Menus



Double Click to expand the **Locations Menu.** Select the appropriate Locations followed by Workstation, DataBase, and Cardholder Menus and set the level of access for each item.



Select the **Menu Items** and assign the **View, Add, Edit, and/or Delete** privileges by checking the appropriate box to the right and then Click OK at the bottom. **Double Right Click** on the Menu Item to provide full rights.

Under **Set Card Status** – selecting **Add** allows the operator to Activate Cards, and selecting **Delete** allows the operator to Deactivate Cards. These two functions can now be separately controlled.

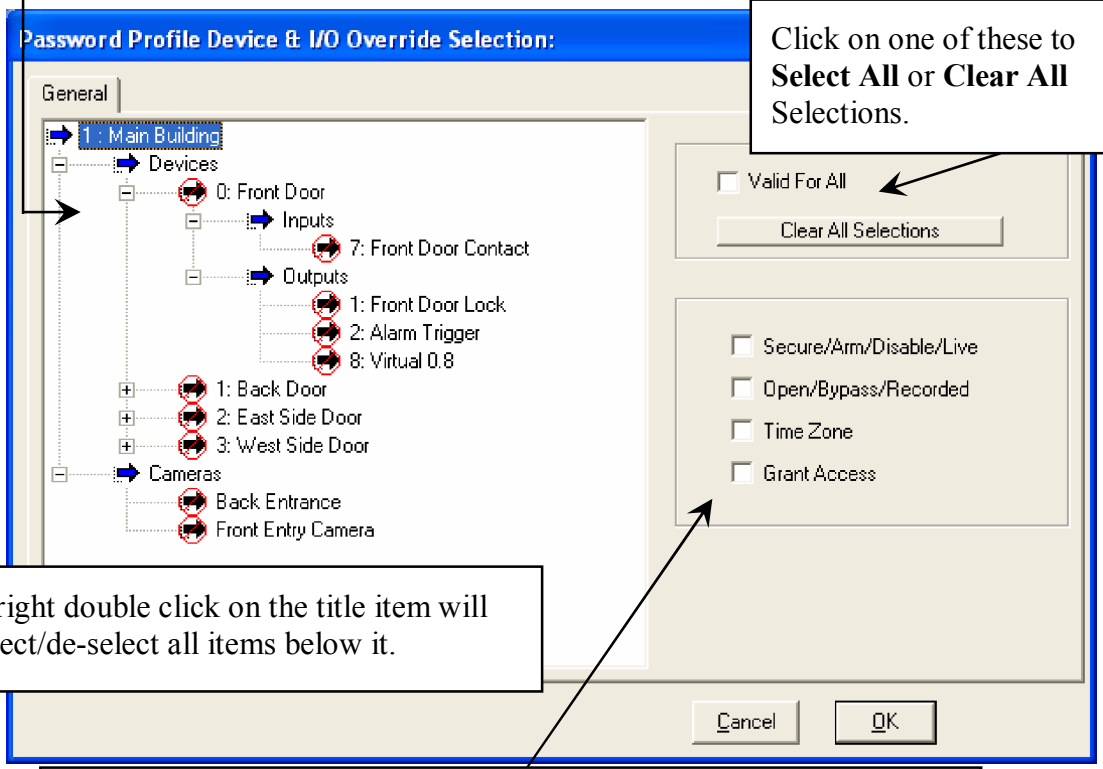
I/O, Device, & Camera Control

Input, Output, and Device (card readers and/or keypads) **Overrides and Camera Control** are assigned to a profile here. Select the devices, inputs, outputs, and cameras an operator with this profile will be allowed to manipulate and have manual control over. Select the point then select one or all of the override commands in the lower right corner. These overrides also apply to Scheduled Overrides.

Double Click on the Location to expand the menu and display all devices.

Double Click on each Device to expand the menu to display all of the inputs and outputs associated with that device.

Double Click on Cameras to expand the menu to display all of the cameras.



Click on one of these to **Select All** or **Clear All** Selections.

A right double click on the title item will select/de-select all items below it.

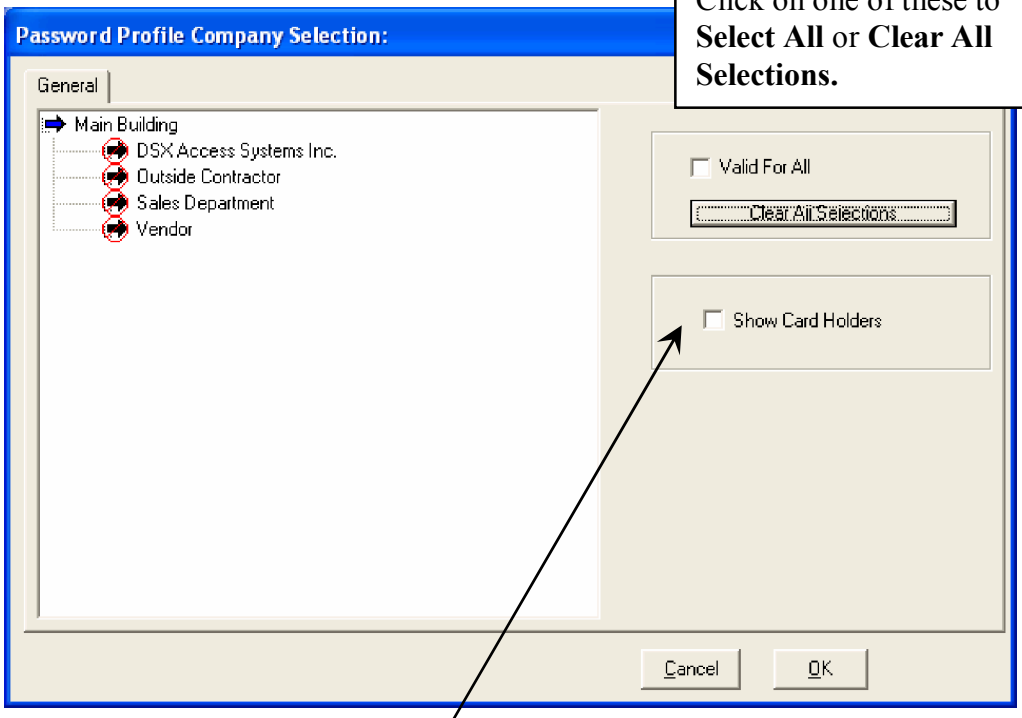
Select the **Device, Input, Output and/or Camera** above and then click on the **Override(s)** appropriate for the point and the profile.

Devices – Disable / Time Zone
Inputs – Arm / Bypass / Time Zone
Outputs – Secure / Open / Time Zone / Grant Access
Cameras – Live / Recorded

All Companies

Companies are the different organizations, businesses, departments, or other groups of card holders. By Selecting a Company here, the operator with this profile will only have access to the card holder data for that company as well as the history that pertains to that company.

Double click on the Location or Location Group below to expand the menu to display all of the Companies defined for the location or locations.



Click on one of these to **Select All** or **Clear All Selections.**

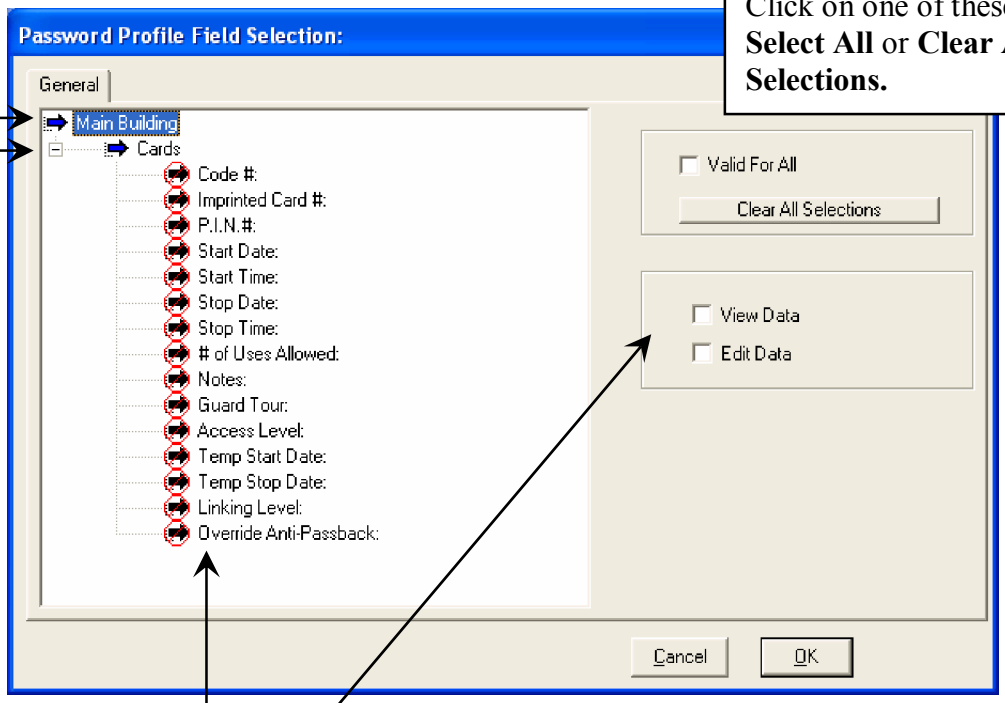
Select the company you wish to give this operator access to and then click here on Show Card Holders. This gives the operator access to all company data such as the card holders assigned to the company and their associated history.

All Card Fields

Select the **Card Data Fields** you wish an operator with this password profile to be able to view and/or edit in the DataBase program under Card Holder / Cards.

Double click on the Location or Location Group and then click on Cards to expand the menu to display the list of card data fields.

Click on one of these to **Select All** or **Clear All Selections.**



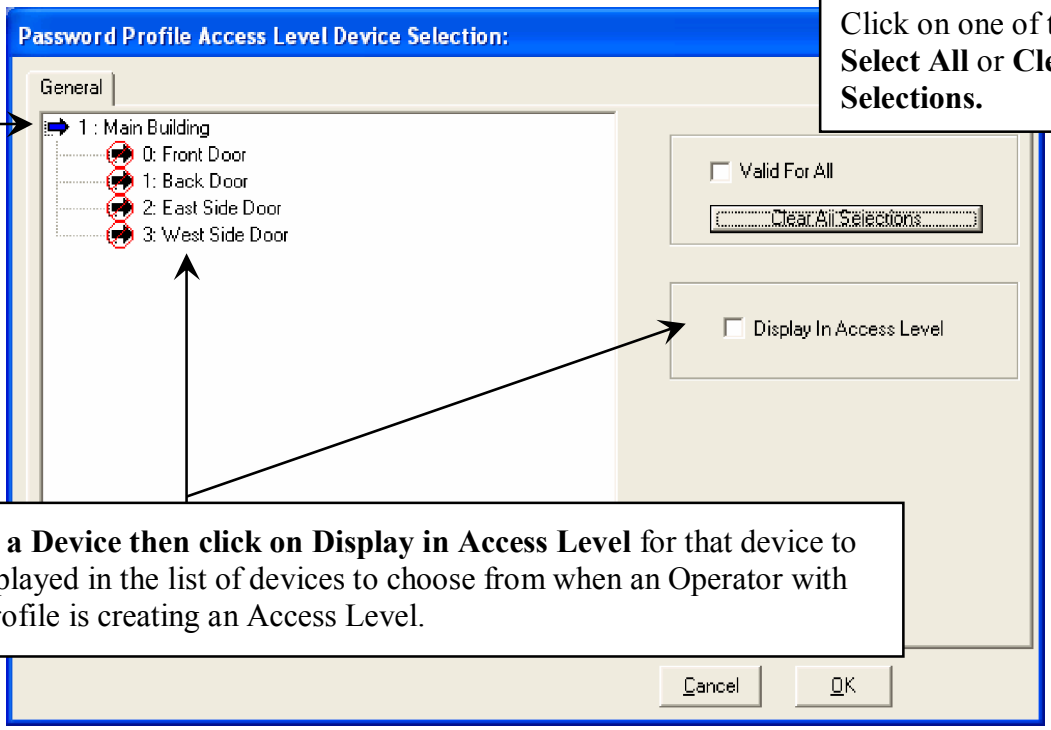
Select the Card Fields from the list above then click on View Data and/or Edit Data to determine which of these fields a user with this password profile will be allowed to view and edit.

Access Level All Devices

Select the **Devices** (Card Reader/Keypad Locations) the operator with this profile will be able to view and assign when creating and issuing access levels to Card Holders.

Double click on the Location or Location Group to expand the menu and view the list of all Card Readers/Keypads in the system.

Click on one of these to **Select All** or **Clear All Selections.**

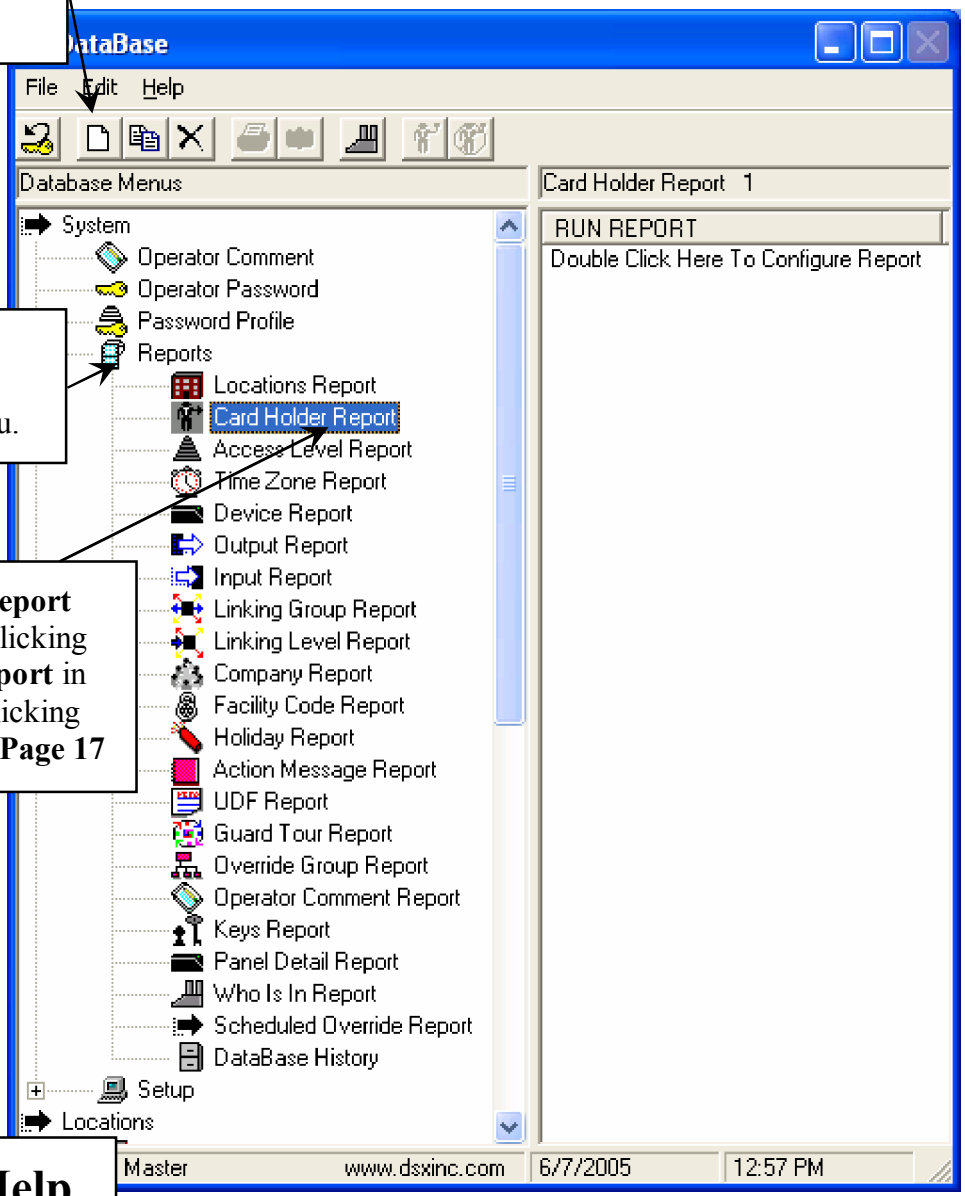


Select a Device then click on Display in Access Level for that device to be displayed in the list of devices to choose from when an Operator with this Profile is creating an Access Level.

Reports

Reports is the location that all system programming can be selected, viewed and printed. Card Holders can be searched, sorted, viewed and printed. **All reports except Keys, Who is In, History, and Time & Attendance are exclusively run from this menu.**

2. Select the Report desired then click on the **Add Button.**



1. Double Clicking on reports expands the Reports selection menu.

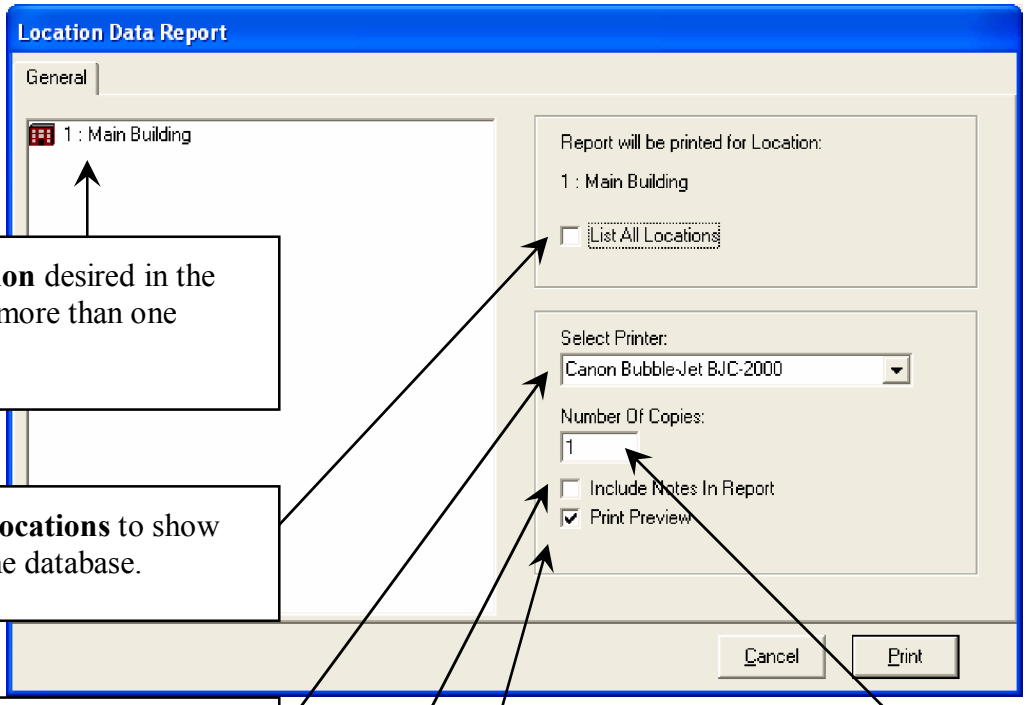
The **Card Holder Report** can be accessed by clicking on **Card Holder Report** in the menu and then clicking on the **Add Button. Page 17**

Press F1 for Help
anywhere in the DataBase and Workstation programs.

Reports / Example

Location Reports include all location information such as which features are enabled, address information and phone numbers.

Use this example for all reports except Card Holder.



Select the **Location** desired in the report if there is more than one Location.

Select **List All Locations** to show all locations in the database.

Select **Printer** if different than the Windows Default Printer.

Set the **Number of Copies** required for the printing of this Report.

Click here to incorporate custom **Notes** in the report if desired.

Click here to **Print Preview** the report on screen prior to printing. The Report can be exported to file from the Pre-View Screen as well as printed to the selected printer.

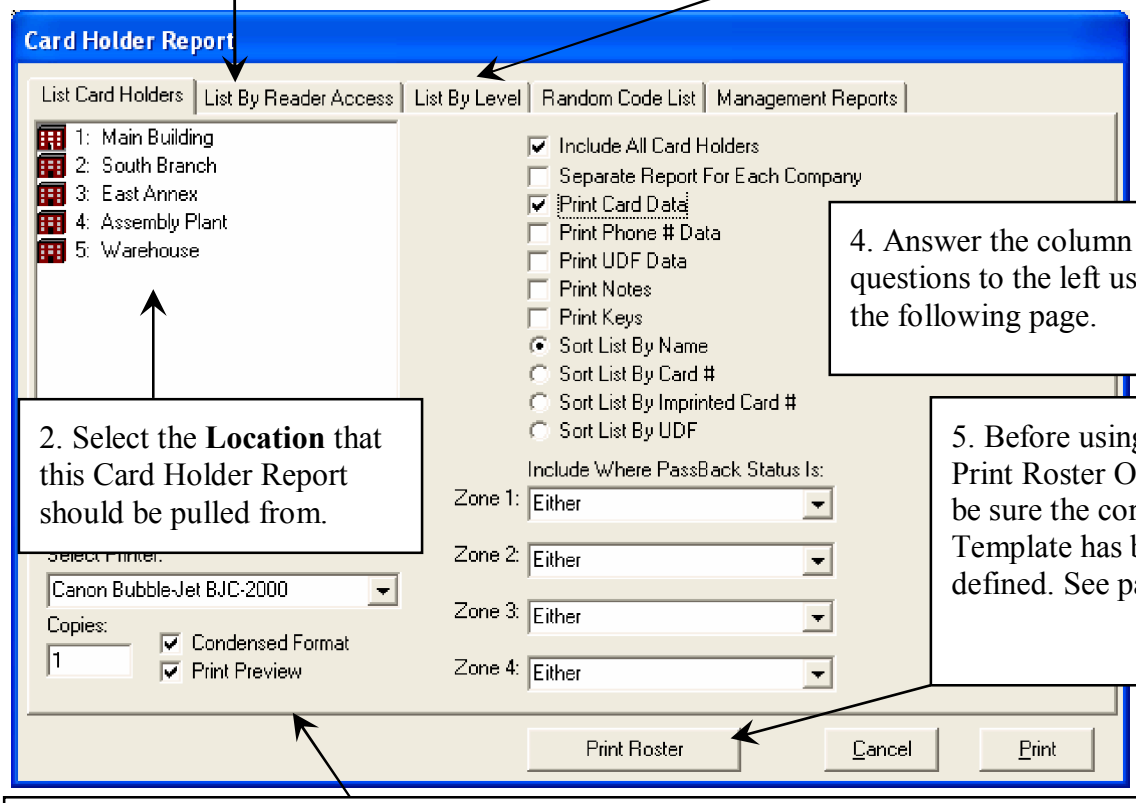
Reports / Card Holder

The **Card Holder Report** can include all card holder information as well as all code / card data. Use this screen to select the Card Data to be included in the Report and whether or not it should be in the condensed or full format. Each Tab represents different reports available such as List by Reader Access or List by Access Level. These Tabs represent separate reports and do not interact.

3. After selecting a Location, Click here for a report which contains Card Holders that **have access to a specific Reader/Keypad** that are listed here.

or

3. After selecting a Location, Click here for a report which contains Card Holders that have a **particular Access Level or Linking Level** listed here.



4. Answer the column of questions to the left using the following page.

2. Select the **Location** that this Card Holder Report should be pulled from.

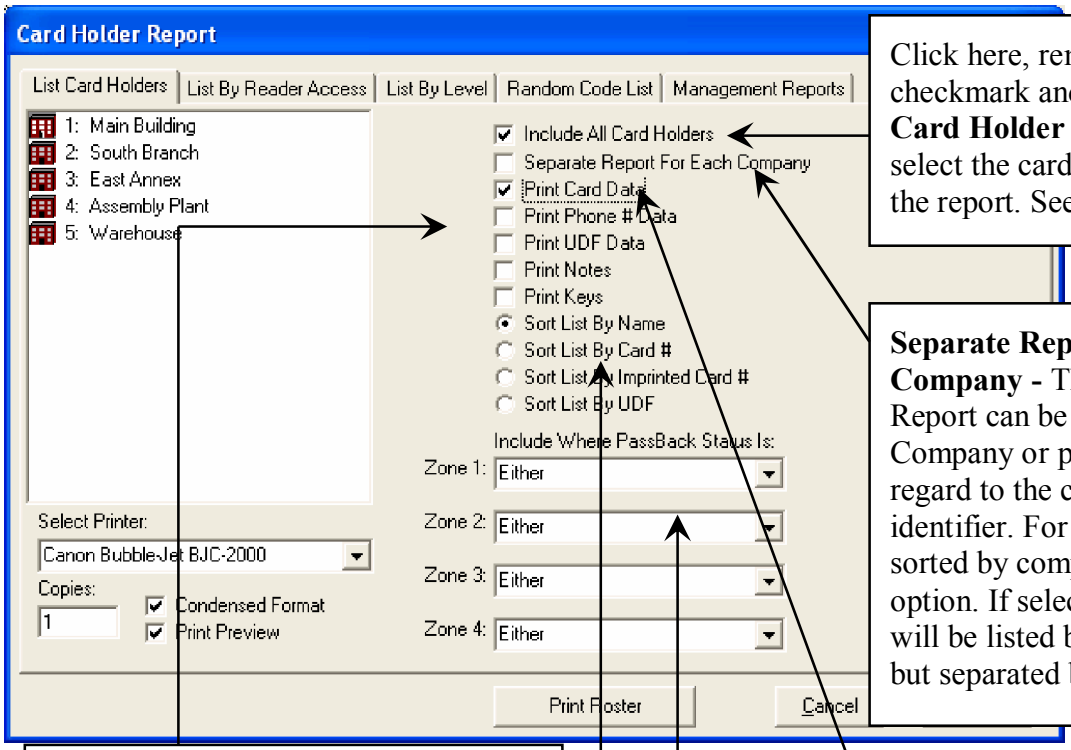
5. Before using the Print Roster Option, be sure the correct Template has been defined. See page 74.

1. The Full Format contains all Card Holder data and prints approximately 5 Card Holders per page. The Condensed Format prints the most common data and can print approximately 53 Card Holders per page. The condensed format consists of Code, Imprinted Card Number, Access Level, Output Linking Level, and Company.

For additional report information access the Help Screen by pressing F1.

Reports / Card Holder

5. **Include All Card Holders** and the subsequent configuration questions and optionally including the state in any or all of the 4 Anti-Passback Zones, then click on Print.



Click here, remove the checkmark and jump to the **Card Holder Search Engine** to select the card holders to be in the report. See next page.

Separate Report for each Company - The Card Holder Report can be sorted by Company or printed without regard to the company identifier. For a report that is sorted by company select this option. If selected, Card Holders will be listed by name or code but separated by company**.**

Select any or all of the additional data to be included in the report.

- Ø **Print Phone Number**
- Ø **Print User Defined Data**
- Ø **Print Notes**
- Ø **Print Keys**

Print Card Data - When selected this option includes Card data such as name, code, access levels, number of uses, activate and de-activate dates, visitor and trace options. Click on this field one time to select or deselect this option. A check mark indicates the report will include the data. Data included also depends on the condensed format selection.

Sort the Card Holder Report in one of the three ways listed by clicking on one of the three radial buttons.

- Ø **List by Name**
- Ø **List by Card Number**
- Ø **List by Imprinted Card Number**
- Ø **List by UDF**

Include Where Passback Status is: Select one or all of the four anti-passback zones and set the status selection to In / Out or Either.

This will further set the search criteria to only find those card holders who currently hold "In", "Out", or "Either" status in one or all of the four zones.

6. Click on OK and proceed to page 22.

Select Names List Criteria

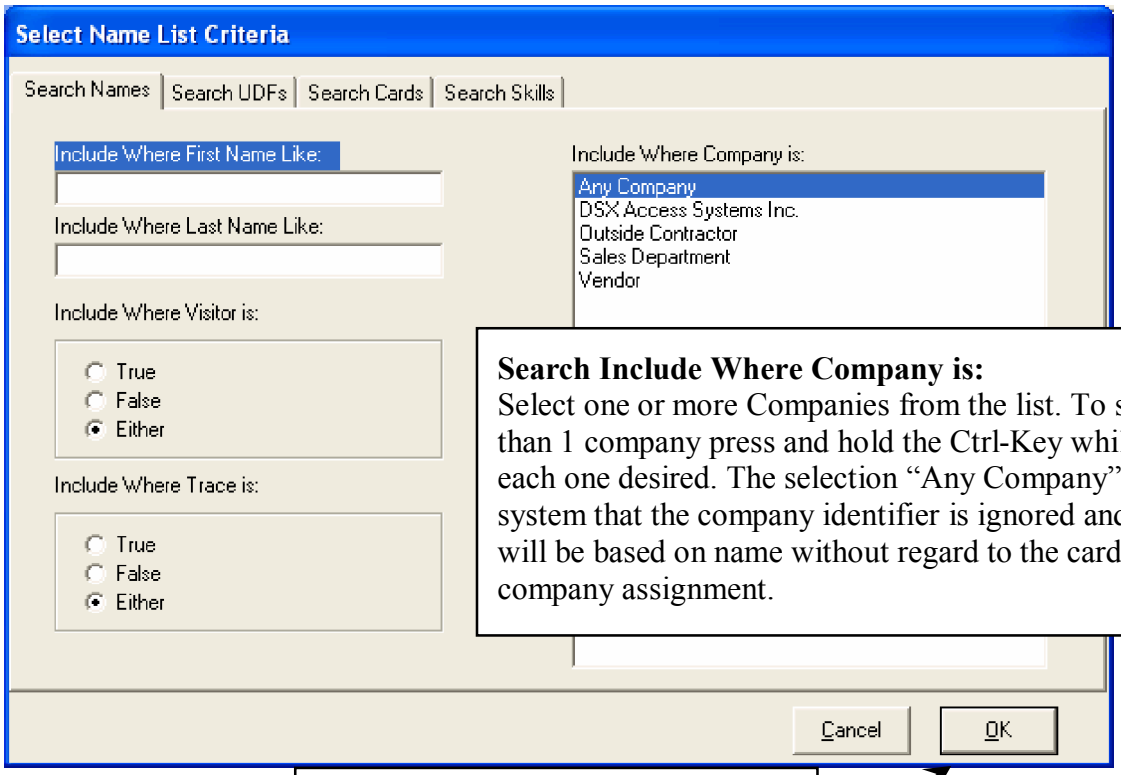
The **Search Names Tab** shown below allows for card holders to be searched and reported based on their First and/or Last Name, Company, Visitor and Trace status.

The **Search UDF Tab** allows for Card Holders to be searched by the custom User Defined Field information.

The **Search Cards Tab** allows for the Card Holders to be Searched by any of the Card data such as the encoded card number, the imprinted card number, the number of days since the card had been used or pending start and stop dates.

The **Search Skills Tab** allows for the Card Holders to be Searched by any of the Skills or Trades assigned to the Card Holders.

How to Use Card Holder Search
Any or all of the data fields on any of the Search Tabs can be used to search for Card Holders. Enter complete or partial search criteria in any or all of the data fields on each Search Tab and click on OK. The selections form an AND statement and can be used to form very precise Card Holder Lists. The Card Holder must meet all of the criteria entered in all search fields on all 3 Tabs in order to be shown in the Card Holder List shown.

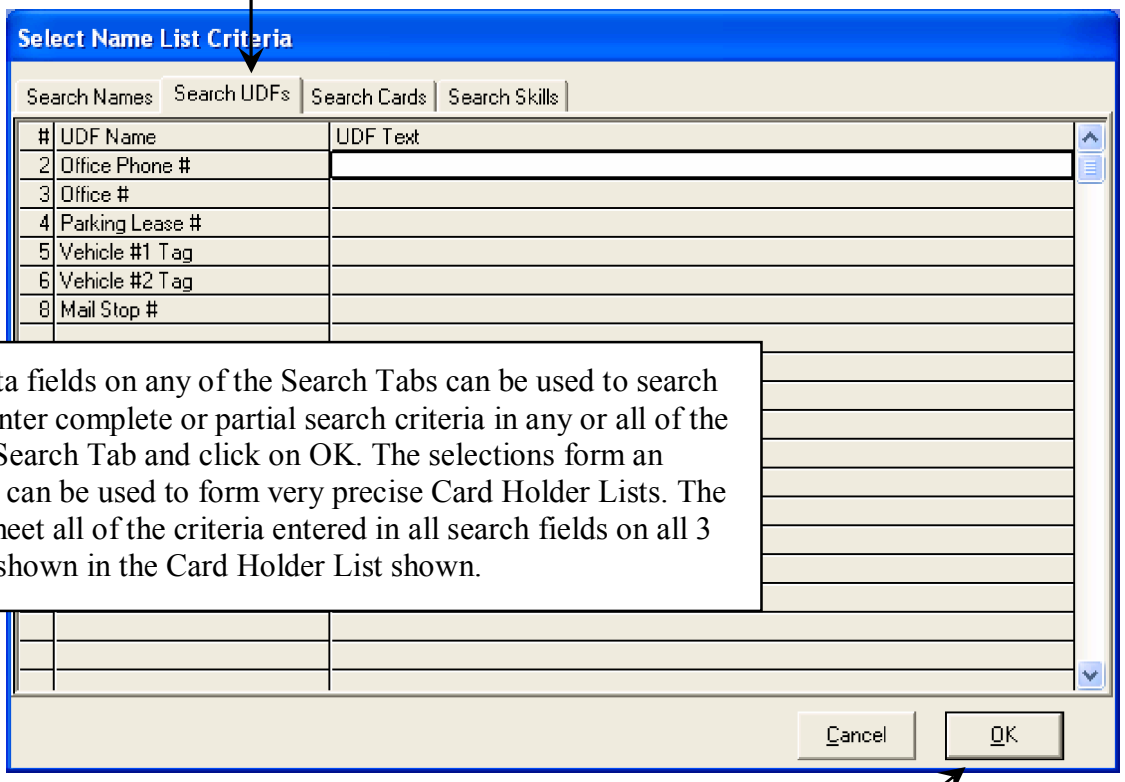


Search Include Where Company is:
Select one or more Companies from the list. To select more than 1 company press and hold the Ctrl-Key while clicking on each one desired. The selection "Any Company" instructs the system that the company identifier is ignored and the search will be based on name without regard to the card holder's company assignment.

Enter the specifying criteria for the search on any or all-4 Search Tabs and click on OK.

Select UDFs List Criteria

The **Search UDF Tab** allows for Card Holders to be searched by the custom User Defined Field information.



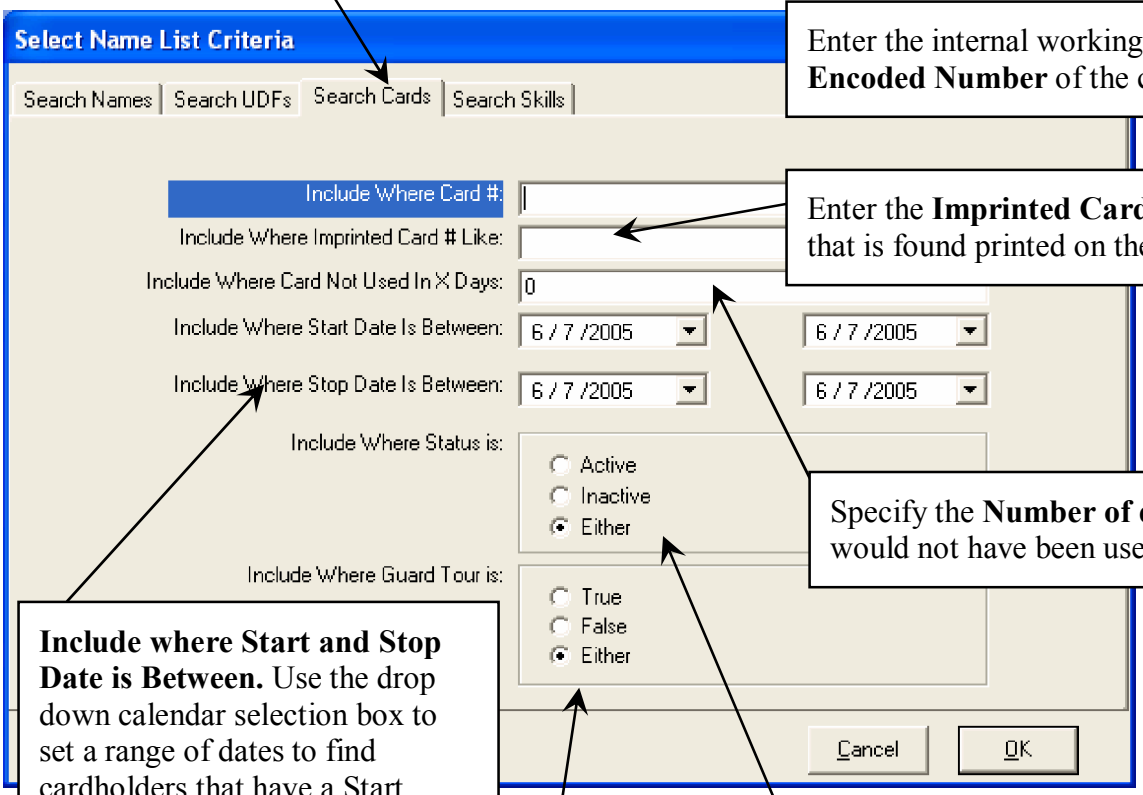
Any or all of the data fields on any of the Search Tabs can be used to search for Card Holders. Enter complete or partial search criteria in any or all of the data fields on each Search Tab and click on OK. The selections form an AND statement and can be used to form very precise Card Holder Lists. The Card Holder must meet all of the criteria entered in all search fields on all 3 Tabs in order to be shown in the Card Holder List shown.

Enter the specifying criteria for the search on any or all-4 Search Tabs and click on OK.

If you are entering an Email Address for Alarm Email Notification be sure and enter only 1 address. Use the full and proper email address, do not use any aliases.

Select Card # List Criteria

The **Search Cards Tab** allows for the Card Holders to be Searched by any of the Card data such as the encoded card number, the imprinted card number, the number of days since the card had been used, or a pending start and stop date.



Enter the internal working or **Encoded Number** of the card.

Enter the **Imprinted Card Number** that is found printed on the card.

Specify the **Number of days** the card would not have been used since.

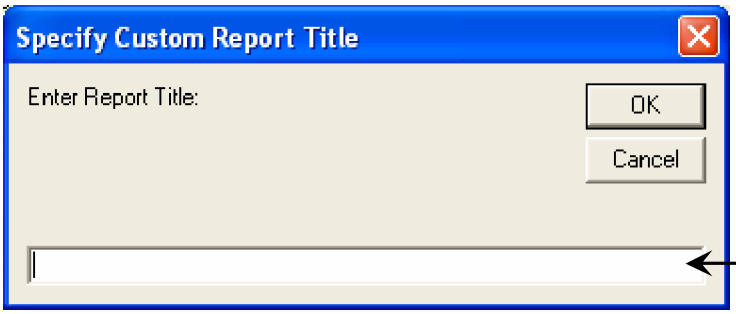
Include where Start and Stop Date is Between. Use the drop down calendar selection box to set a range of dates to find cardholders that have a Start and/or Stop date within that range. This search can be useful to find Card Holders whose cards have been set to turn on or off on a certain date.

Specify if the code(s) to be searched for must have the Guard **Tour** feature enabled - **True, False, or Either.**

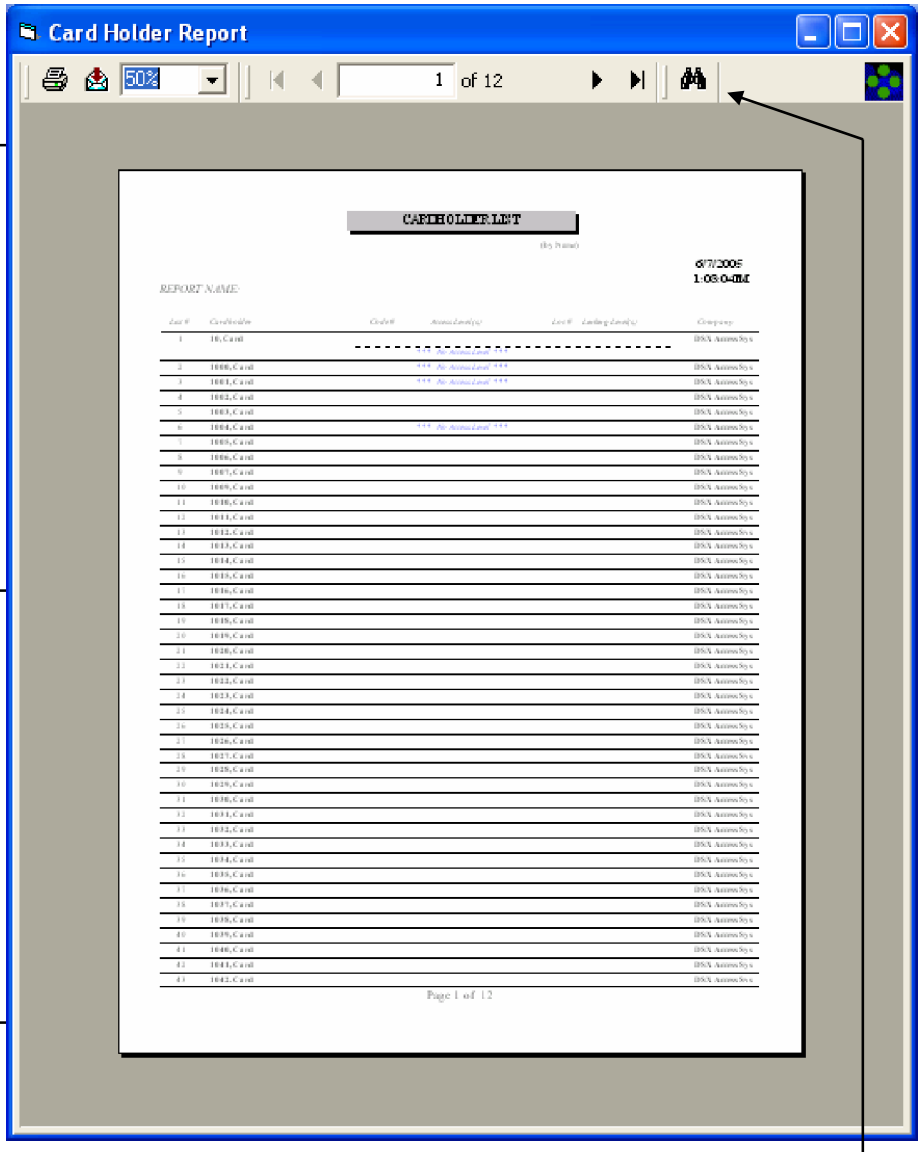
Include where status is:
Set the status of the Card Holder you wish to include in the Search. Click on Active, Inactive, or Either to set the search status appropriately. Active are those cards that are operational in the system. Inactive is those cards that have been turned off and no longer functional. Select Either if the active status should have no bearing on the search.

Once the **Card Holder search is complete** click on OK and you are returned to the location in the software that you requested the Card Holder Search from. This could be Card Holder Reports, History, DataBase/Card Holder.

Reports / Card Holder Print PreView & Export



7. Enter a **Title for the Card Holder Report** and click on OK.



The **Print Pre-View** screen appears and provides the ability to change the print size for larger and smaller viewing.

8. The **Report can be exported to a File by clicking on the Envelope ICON** and selecting the file format of choice. Use the RTF format to best maintain the page formatting.

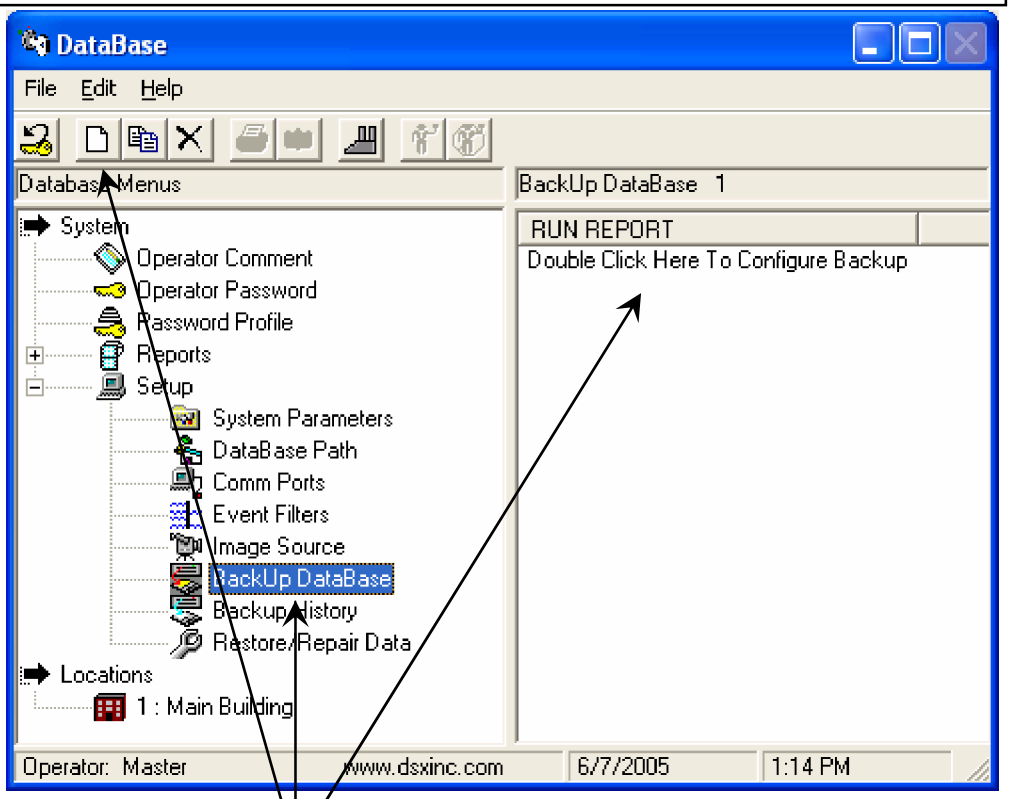
or

8. The **Report is printed by clicking on the Printer ICON** that in turn sends the report to the default or selected Windows Printer.

To search for an item within the report click on the search binoculars at the top of the report.

System / Setup
Backup DataBase

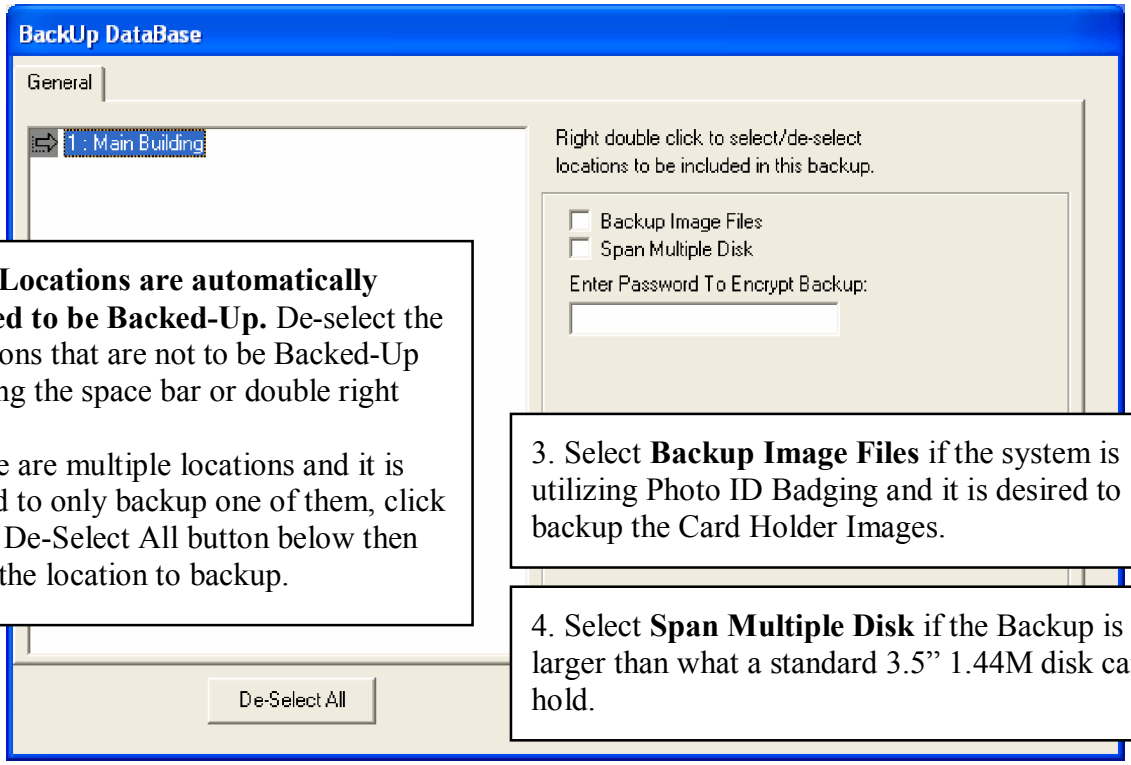
This is where the **DataBase Backup Utility** is located. The database can be backed up to any drive and or directory in a compressed or non-compressed format. Automatic Backups are configured under System Parameters at the Comm Server only. Location selectable, this backup allows one or multiple location's database to be backed up. If only one Location is selected then only that location's data will be backed up. This backup could then be used to separate a single location from a larger system. Backups include Scheduled Overrides for Inputs, Outputs, and Override Groups.



1. Select **Backup DataBase** and click on either the Add button or on the "Double Click Here to Configure Backup" message.

Restoring and Repairing a DataBase should only be performed by the System Administrator. Use caution in performing these tasks.

System / Setup
Backup DataBase



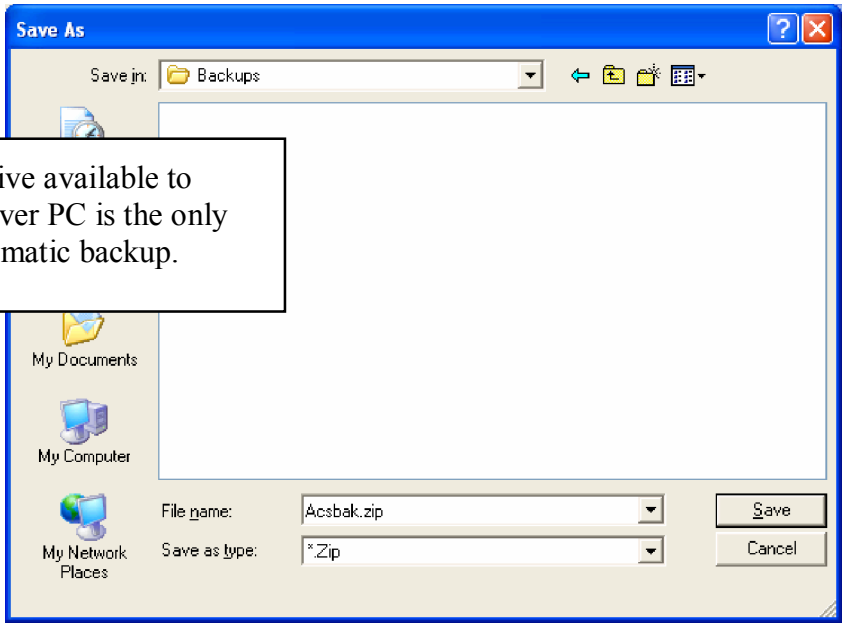
2. **All Locations are automatically selected to be Backed-Up.** De-select the Locations that are not to be Backed-Up by using the space bar or double right click.
If there are multiple locations and it is desired to only backup one of them, click on the De-Select All button below then select the location to backup.

3. Select **Backup Image Files** if the system is utilizing Photo ID Badging and it is desired to backup the Card Holder Images.

4. Select **Span Multiple Disk** if the Backup is larger than what a standard 3.5" 1.44M disk can hold.

5. Enter a **Password to Encrypt** the Backup if desired. Use up to 9 alphanumeric characters.

6. **Click OK** to proceed.

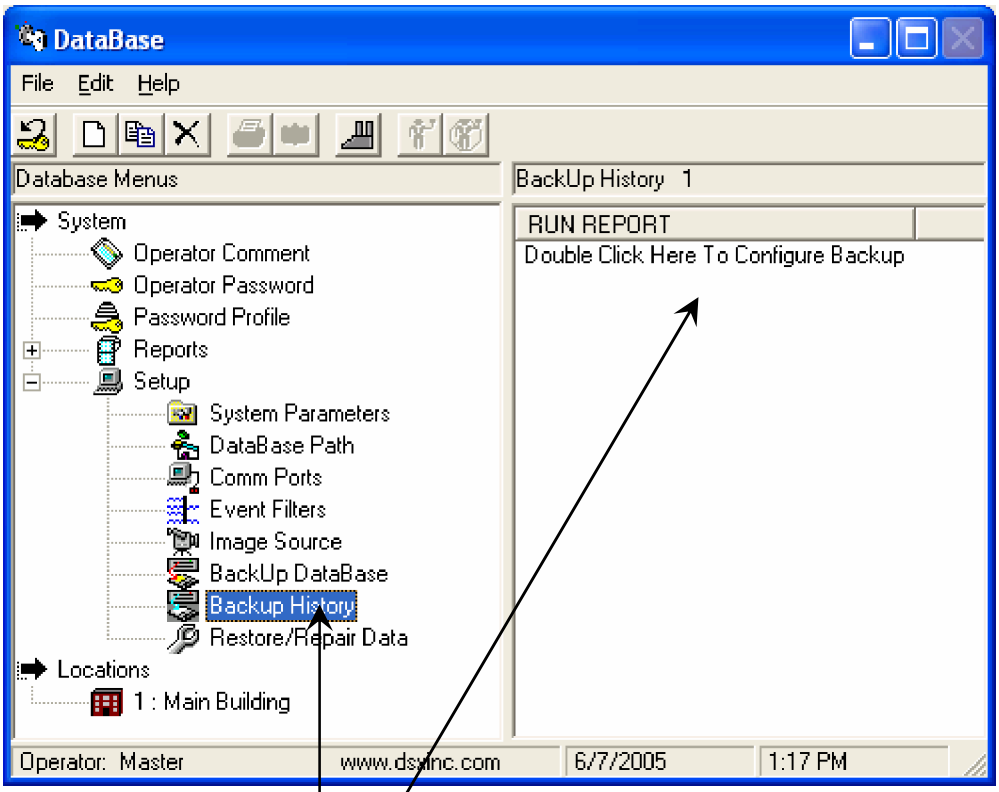


7. Save the backup to any drive available to Windows™. The Comm Server PC is the only one that can perform an automatic backup.

System / Setup
Backup History

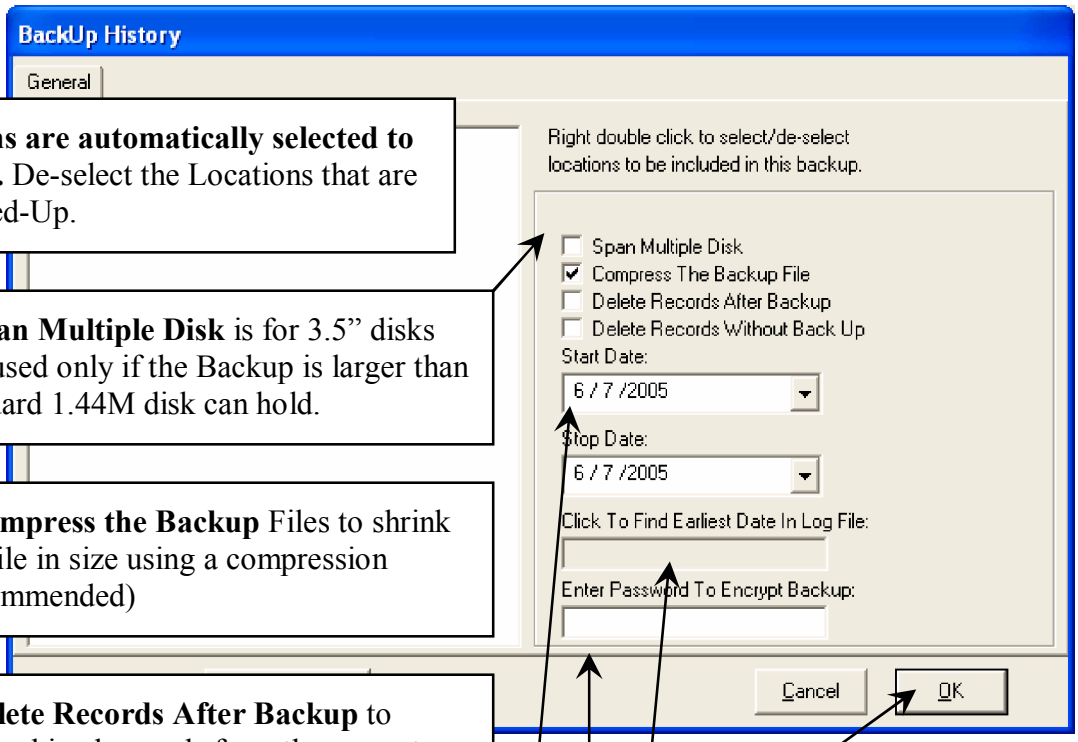
This is the location of the **History Backup Utility.** The History database can be backed up to any drive and or directory in a compressed or non-compressed format. Automatic Backups are configured under "Setup" "System Parameters" and can be executed by the Comm Server only. History can be archived and saved in a different location or resource on regular intervals and the archived or backed up history can be deleted from the current History database. When running a History Report the name and location of the history database can be specified as one of the archived history files.

*****See important note on page 27.*****



1. Select **Backup History** and click on either the Add button or on the "Double Click Here to Configure Backup" message.

System / Setup
Backup History



2. **All Locations are automatically selected to be Backed-Up.** De-select the Locations that are not to be Backed-Up.

3. Select **Span Multiple Disk** is for 3.5" disks only and is used only if the Backup is larger than what a standard 1.44M disk can hold.

4. Select **Compress the Backup** Files to shrink the history file in size using a compression utility. (recommended)

5. Select **Delete Records After Backup** to remove the archived records from the current history file. ****See important note next page**.****

6. Select **Delete Records without Back UP** allows history to be selected and purged without being archived first.

7. Set the **Start Date** for the beginning of the History purge or archive.

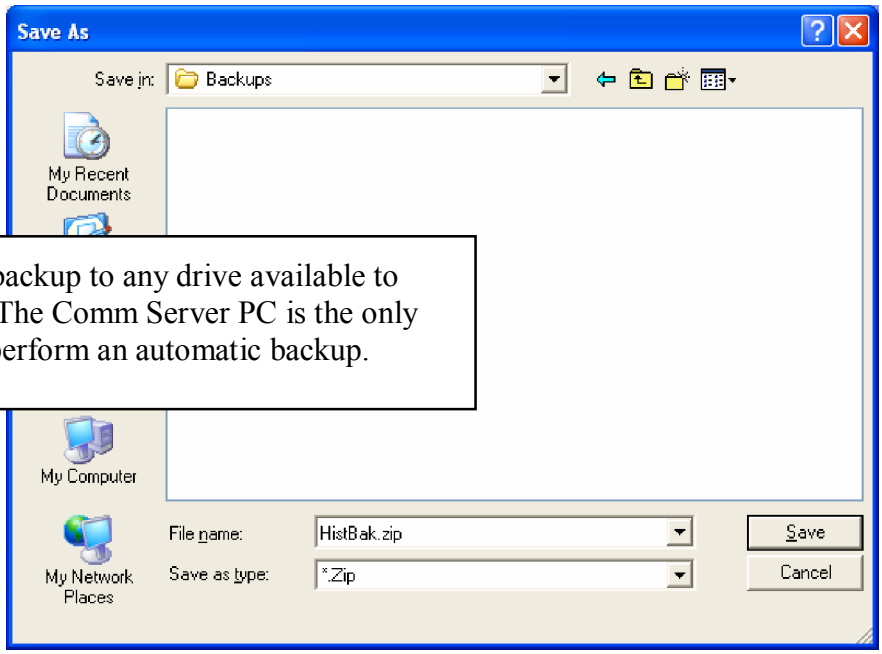
Set the **Stop Date** for the end of the History purge or archive.

9. Once the entire Archive and Purge configuration has been set, click on **OK**.

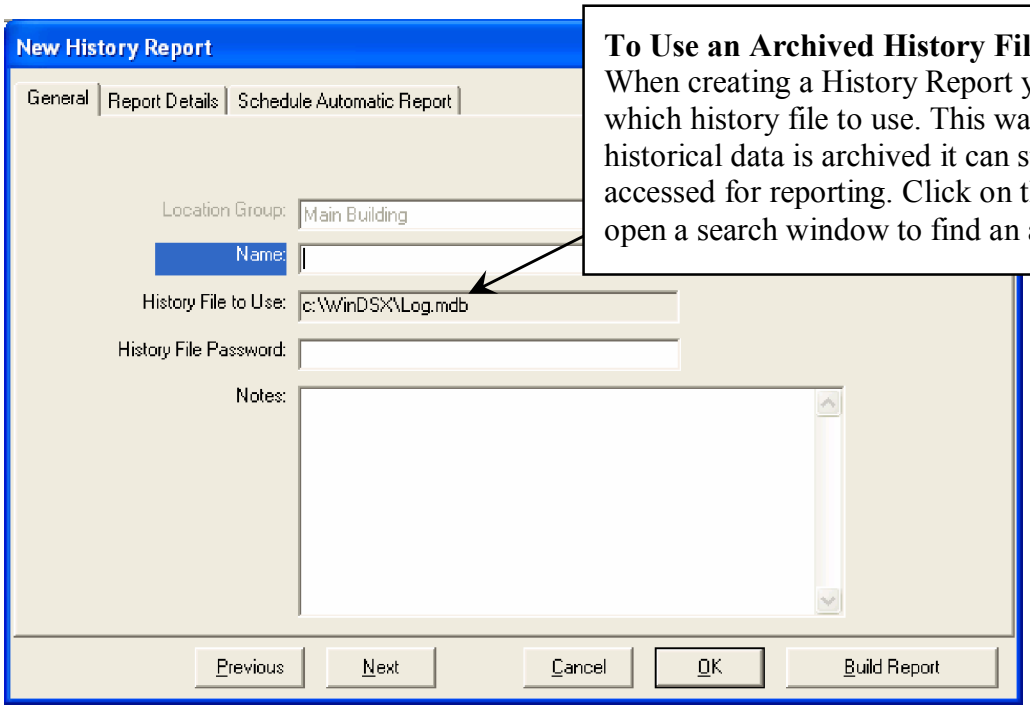
7A. Click here to have the system return the **Earliest Date in the History File** that you can optionally enter in the Start Date field.

8. Enter **a Password to Encrypt** the Backup if desired. Use up to 9 alphanumeric characters.

System / Setup
Backup History



10. Save the backup to any drive available to Windows™. The Comm Server PC is the only one that can perform an automatic backup.

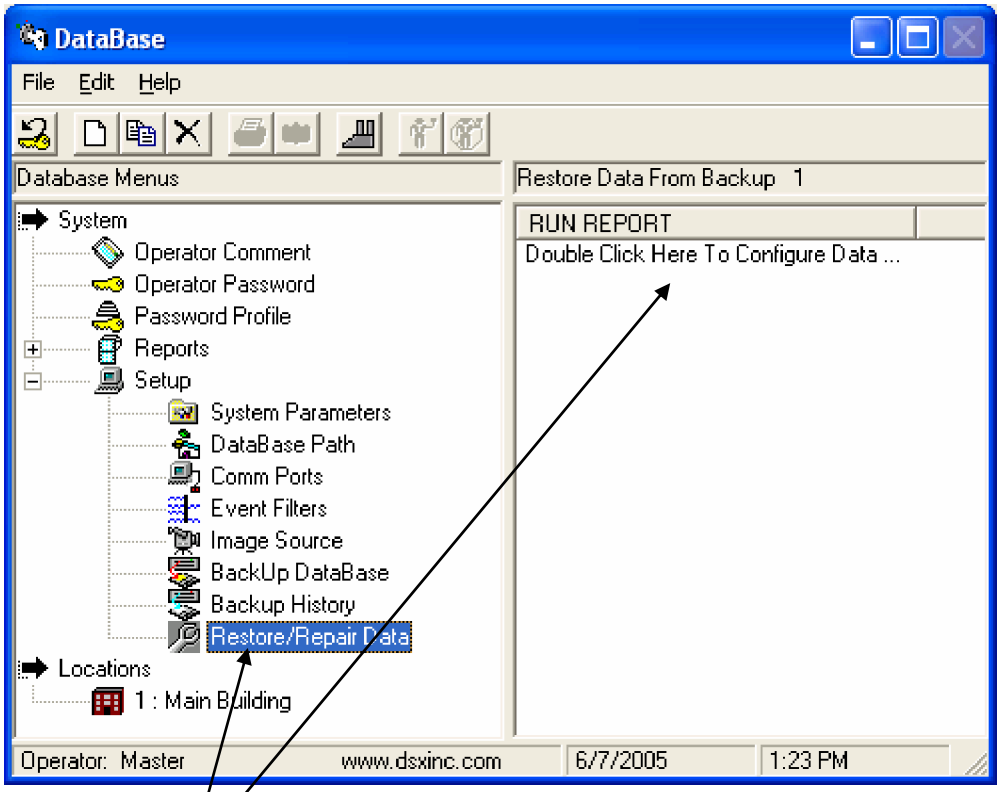


To Use an Archived History File
When creating a History Report you may specify which history file to use. This way when historical data is archived it can still be easily accessed for reporting. Click on this name to open a search window to find an alternate file.

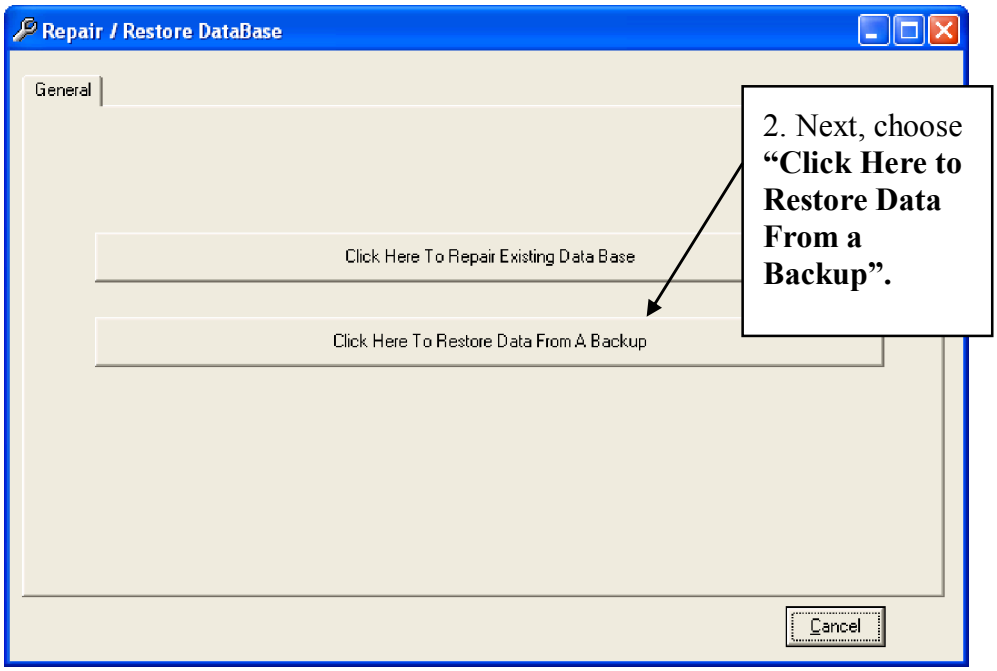
***** IMPORTANT ! *****

The log.mdb file contains ALL history generated on the system except for Database Changes. This includes Access Grants, Denieds, Alarms, Restorals, etc. Therefore, the log.mdb file can become quite large and possibly too large to be managed. It is highly recommended that the backup and delete routine be done on at least a monthly basis.

System / Setup
Restore/Repair Data

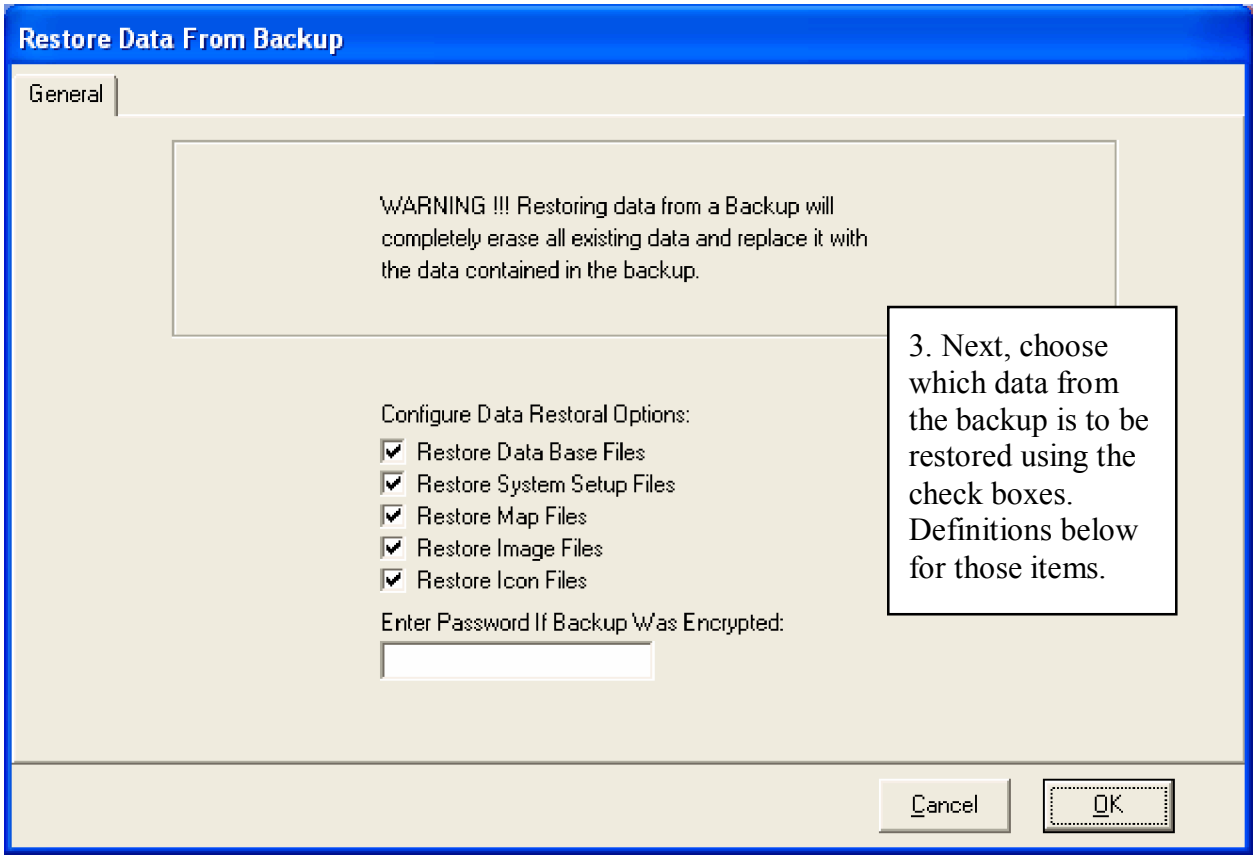


1. Select **Restore/Repair Data** then choose "Double Click Here to Configure Data Restore/Repair".



2. Next, choose **"Click Here to Restore Data From a Backup".**

System / Setup
Restore/Repair Data



3. Next, choose which data from the backup is to be restored using the check boxes. Definitions below for those items.

Restore Database Files – Select this to restore the Database Files. De-select this to exclude it from the Restoration. This includes all location and card holder information.

Restore System Setup Files – Select this to restore the Setup Files. This includes system parameters, and comm ports. De-select this to exclude this information from the Data Restoration.

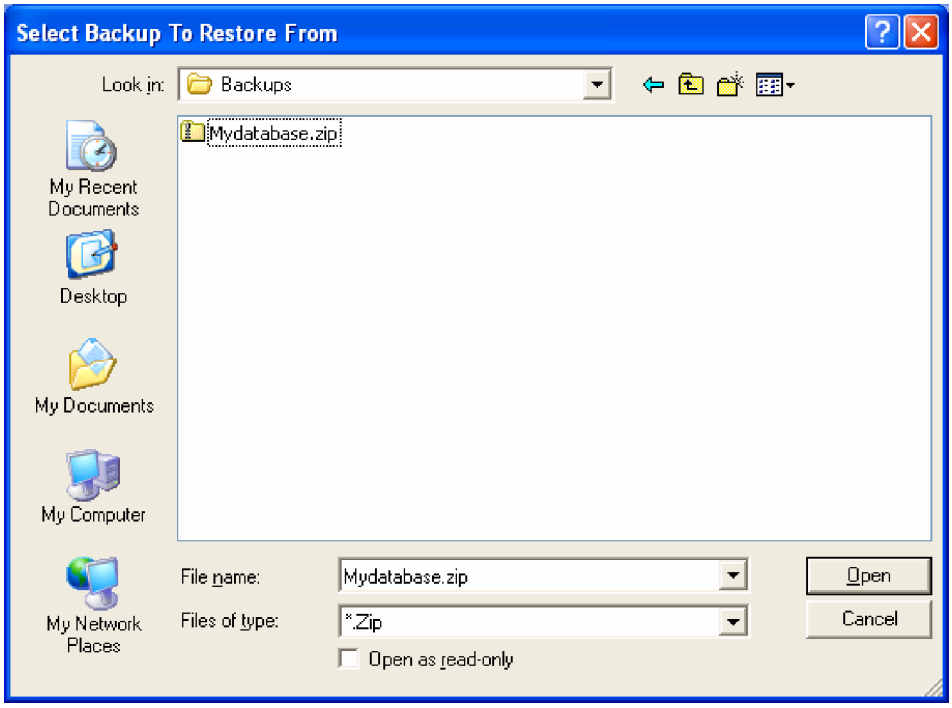
Restore Map Files – Select this to restore the Graphic Alarm Maps. De-select this to exclude the Graphic Alarm Maps from the Data Restoration.

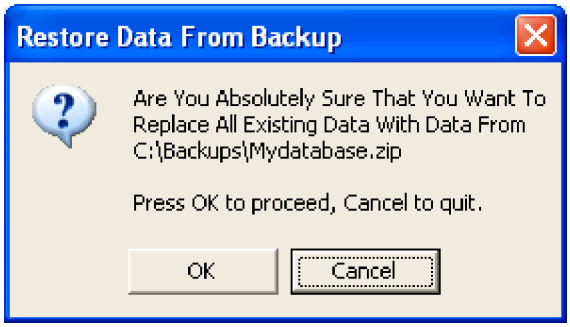
Restore Image Files – Select this to restore the Card Holder Image Files. De-select this to exclude Image Files from the Data Restoration.

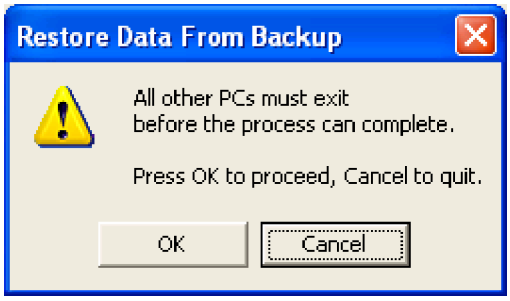
Restore Icon Files – Select this to restore the System Icons. De-select this to exclude Icon Files from the Data Restoration.

System / Setup
Restore/Repair Data

4. Next choose the location of the backup file.







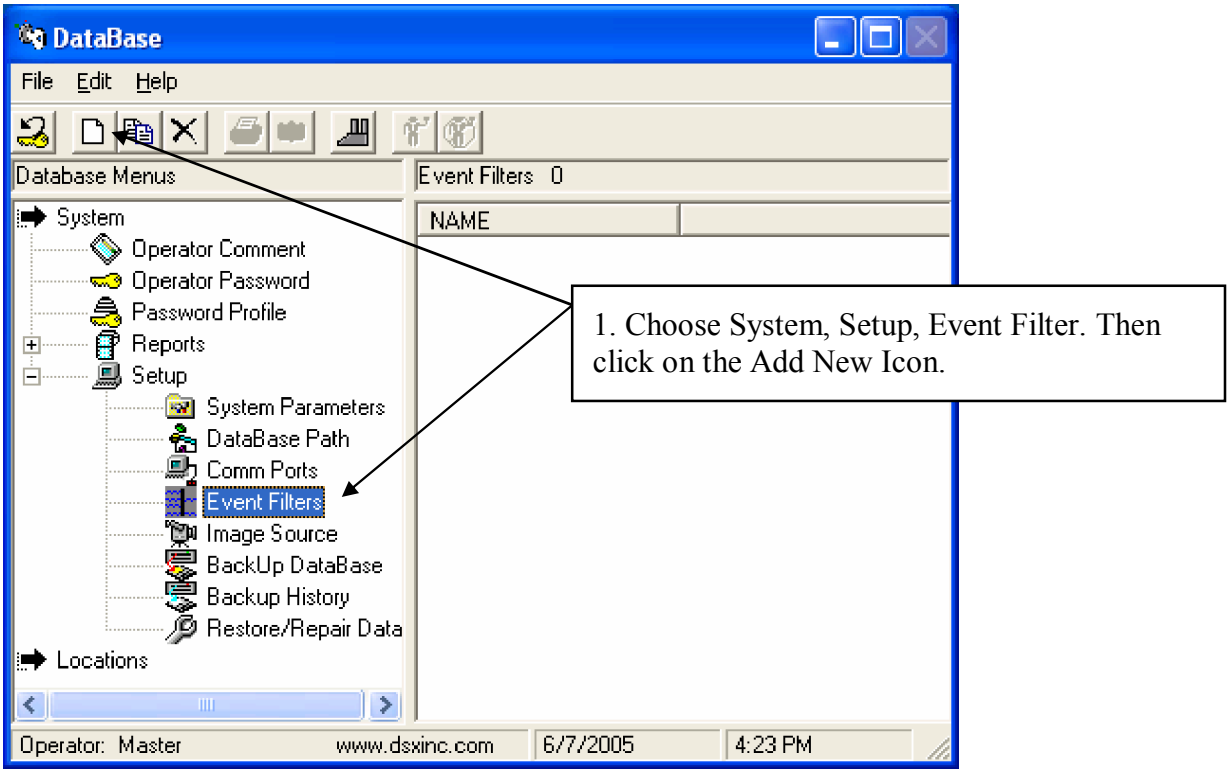
5. Click OK at the ARE YOU SURE prompt, and be sure no other Workstations are running the program. This must include the Comm Server program on the PC being restored to.

Event Filter

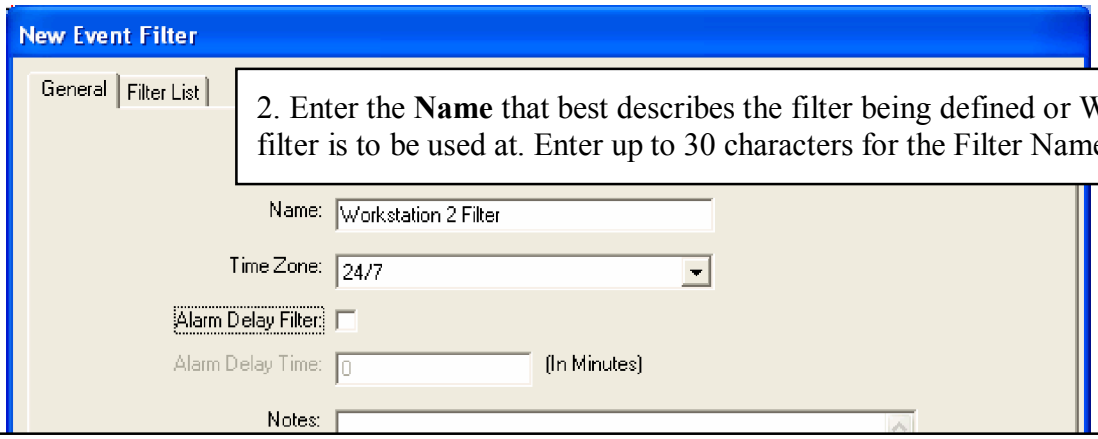
Event Filters can be defined to prevent unwanted activity from being displayed at this workstation. Each Filter can determine which Locations, readers, inputs, and outputs will generate events that are visible at this workstation. Event Filters are defined locally for each workstation that is to employ them. When no filters are defined, all events from all locations are displayed at that Workstation.

Multiple Event Filters can be defined for each Workstation with each one controlled by a time zone. This allows a Workstation on the LAN to view card read events and/or alarm activity, from one area during one part of the day, from an additional area during another specified time of day, and possibly from all areas during yet another period of time.

When using multiple Event Filters at a Workstation it is important to consider that each filter is in parallel with the next. If it is desired to block a particular event then each filter must block that event or it will be visible in the Workstation program.



Event Filter



2. Enter the **Name** that best describes the filter being defined or Workstation the filter is to be used at. Enter up to 30 characters for the Filter Name.

3. Select the **Time Zone** that defines when the Event Filter is to start passing non-filtered events. Filtered events (those that have the red circle and slash) are never displayed. Non-filtered events (those that do not have the red circle and slash) are displayed according to the time zone assigned. With a 24 hour time zone non-filtered events will be displayed all of the time. The Start Time of the Time Zone is when the non-filtered events begin to display and the Stop Time is when they are no longer displayed. When the time zone is inactive all non-filtered events quit being displayed.

For example if there were three Locations within the system and Location 1 events are to be displayed all of the time at this workstation, Location 2 events are to be displayed from 12:00 PM to 8:00 AM, and Location 3 events are to be displayed from 6:00 PM to 8:00 AM three filters would be defined.

The first Event Filter would be defined so that Location 2 and 3 would be filtered (red circle/slash) and Location 1 would be non-filtered (no red circle/slash) with a 24 hour time zone assigned.

The second Event Filter would be defined so that Location 1 and 3 would be filtered (red circle/slash) and Location 2 would be non-filtered (no red circle/slash) with a 12:00 PM Start to 8:00 AM Stop time zone assigned.

The third Event Filter would be defined so that Location 1 and 2 would be filtered (red circle/slash) and Location 3 would be non-filtered (no red circle/slash) with a 6:00 PM Start to 8:00 AM Stop time zone assigned.

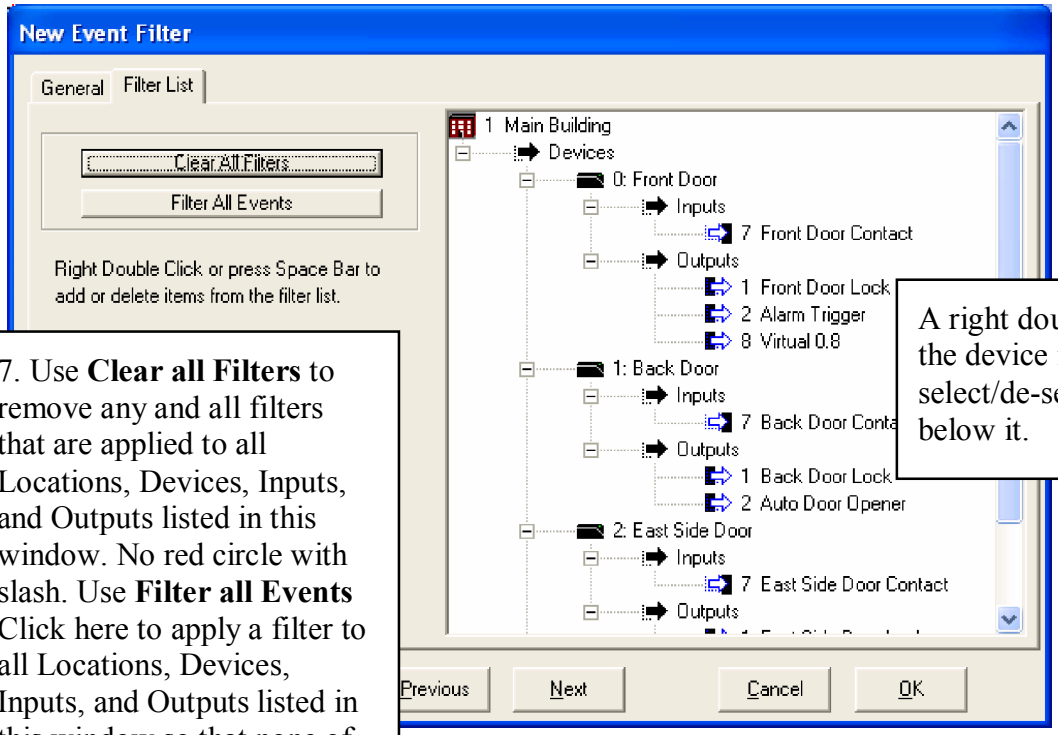
4. **Alarm Delay Filter** determines if this filter will be used to delay alarm events from displaying at this workstation unless the alarms are not acknowledged at a different workstation within the Alarm Delay Time which is defined next. The alarm delay filter option applies to alarms that are not filtered (no red circle/slash). Filtered alarms (red circle/slash) are never displayed.

5. **Alarm Delay Time** defines in minutes the amount of time that non-filtered input alarms should go unacknowledged at a different workstation before displaying on this workstation.

Event Filter

6. By default all events from all locations are restricted when defining a new Event Filter. Double left click on Location to expand the menu displaying all Devices in that location. Double left click on a Device to display Inputs and Outputs for that Device. Double left click again on Inputs and Outputs to display the list of Inputs and/or Outputs defined for that device.

Select (click on) the item and then double right click or press the space bar to enable the filter – red circle with a slash, or disable the filter – no red circle with a slash.



A right double click on the device item will select/de-select all items below it.

7. Use **Clear all Filters** to remove any and all filters that are applied to all Locations, Devices, Inputs, and Outputs listed in this window. No red circle with slash. Use **Filter all Events** Click here to apply a filter to all Locations, Devices, Inputs, and Outputs listed in this window so that none of their events will be displayed at this workstation. Red circle with slash.

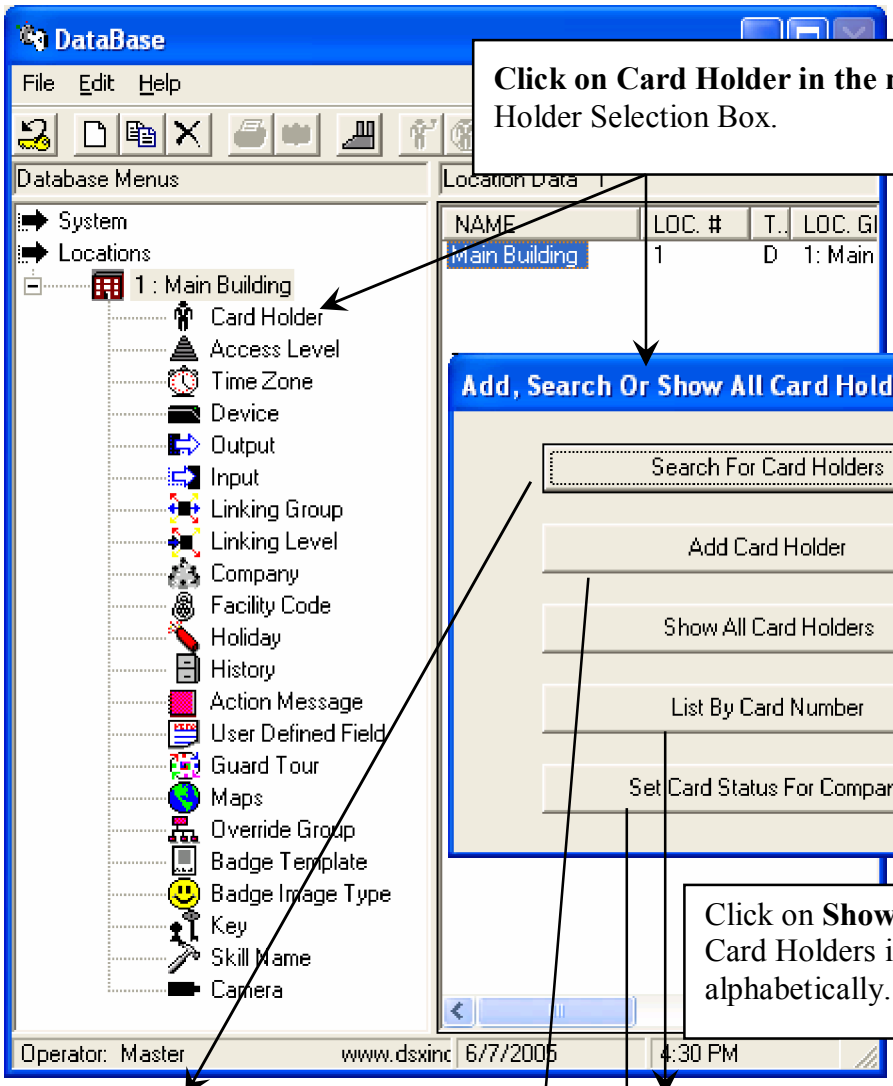
8. Double left click on Location to expand the menu displaying all Devices in that location. Double left click on a Device to display Inputs and Outputs and then again on Inputs and Outputs to display the list of Inputs and/or Outputs defined for that device.

Select the item and then double right click or press the space bar to enable the filter – red circle with slash, or disable the filter – no red circle and slash.

Filter Location to stop all Location events such as Location Communication Loss.
Filter Devices to stop all card read events from that particular device or reader.
Filter Inputs and Outputs to stop all messages including alarms from those points.

Card Holder

DataBase Location Menu
With the location menu expanded select Card Holder. The Search, Add, and Show Card Holders selection box appears.



Click on Card Holder in the menu to access the Card Holder Selection Box.

Click on **Show All Cardholders** to list all Card Holders in that Location sorted alphabetically. Jump to **page 38.**

Click on **Search for Card Holders** to evoke the Card Holder Search Engine. Jump to **page 35.**

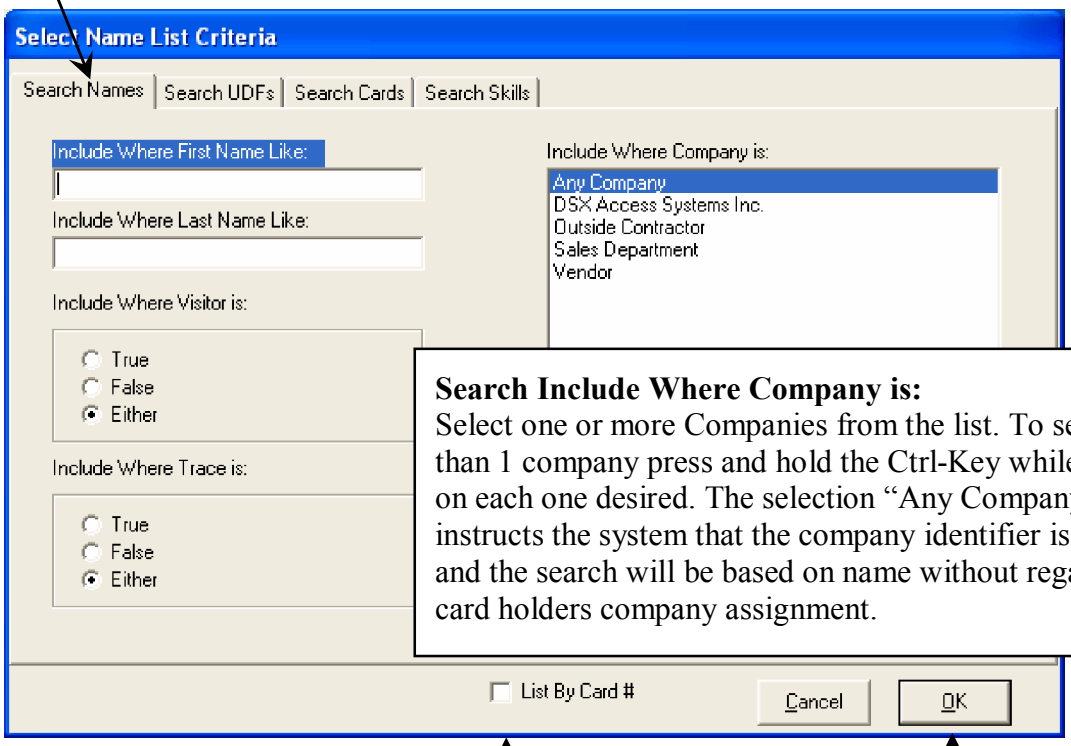
Click on **List by Card Number** to list all Card Holders by the Card Number.

Click on **Add Card Holders** to jump directly to the Card Holder data entry screen. Jump to **page 39.**

Click on **Set Card Status for Company** allows all Card Holders assigned to a company to be activated, de-activated and a new De-activate date set. Jump to **page 52.**

Card Holder - Search Names

The **Search Names Tab** shown below allows for card holders to be searched and reported based on their First and/or Last Name, Company, Visitor and Trace status.



Search Include Where Company is:
Select one or more Companies from the list. To select more than 1 company press and hold the Ctrl-Key while clicking on each one desired. The selection "Any Company" instructs the system that the company identifier is ignored and the search will be based on name without regard to the card holders company assignment.

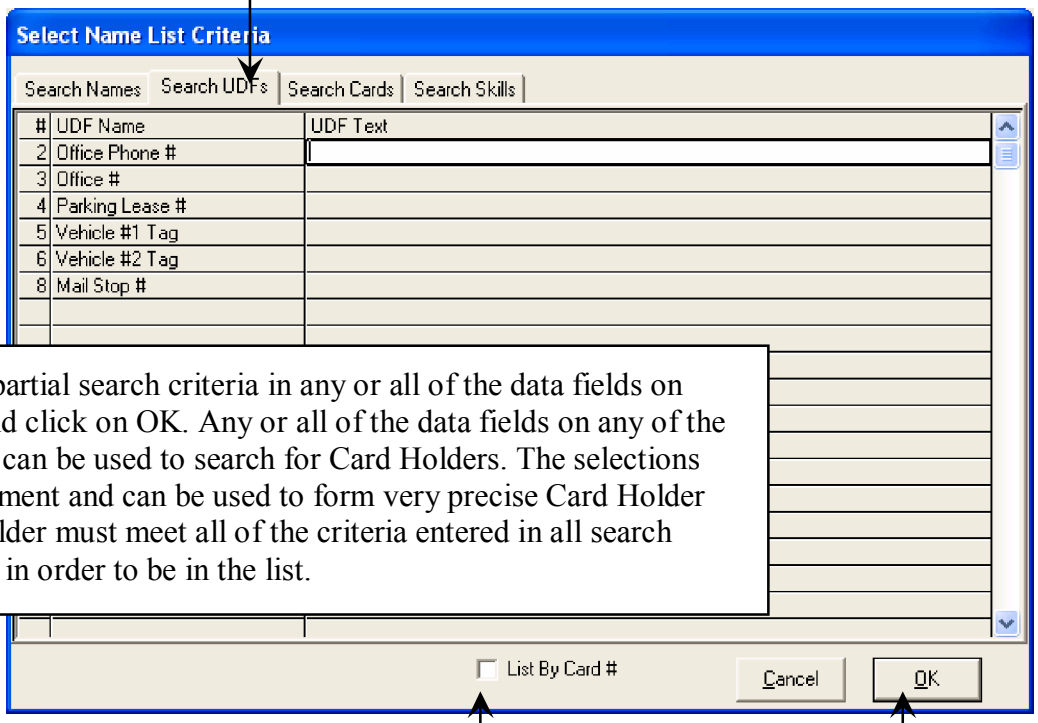
Click here to sort the results of the Card Holder search **by Card number** instead of by Name.

Enter the specifying criteria for the search on any or all-4 Search Tabs and click on OK.

How to Use the Card Holder Search
Any or all of the data fields on any of the Search Tabs can be used to search for Card Holders. Enter complete or partial search criteria in any or all of the data fields on each Search Tab and click on OK. The selections form an AND statement and can be used to form very precise Card Holder Lists. The Card Holder must meet all of the criteria entered in all search fields on all 4 Tabs in order to be shown in the Card Holder List shown.

Card Holder - Search UDFs

The **Search UDF Tab** allows for Card Holders to be searched by the custom User Defined Field information.



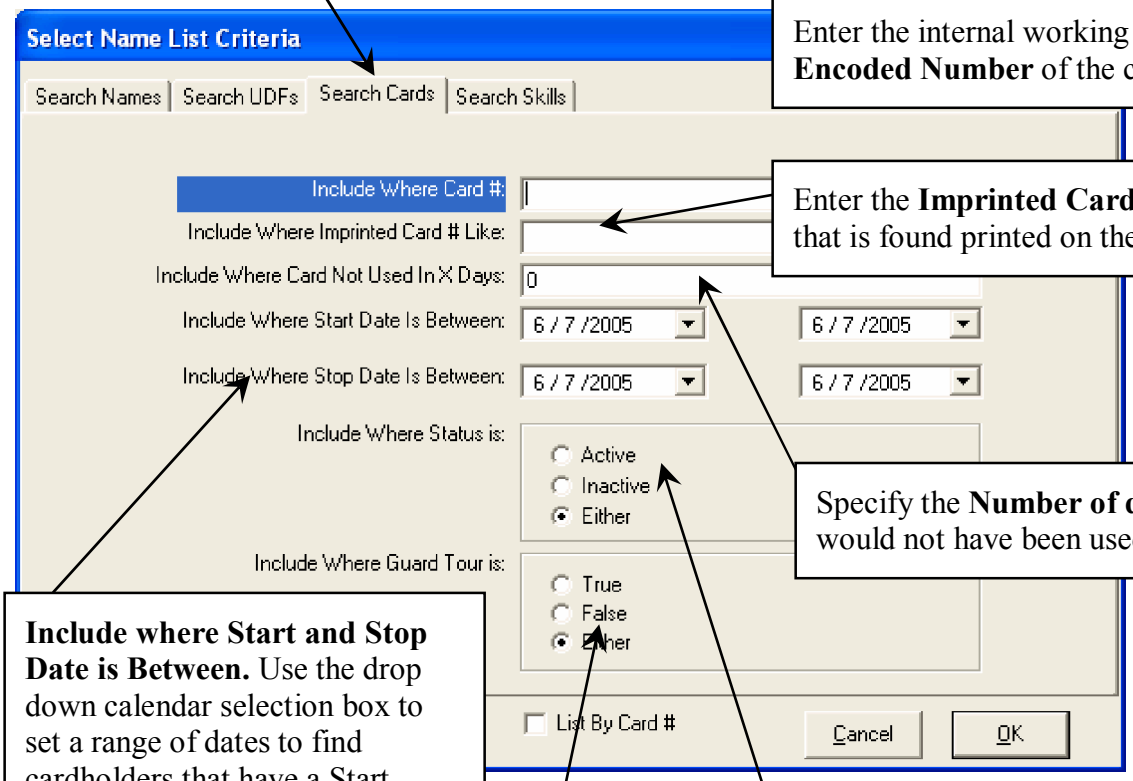
Enter complete or partial search criteria in any or all of the data fields on each Search Tab and click on OK. Any or all of the data fields on any of the Search Tabs below can be used to search for Card Holders. The selections form an AND statement and can be used to form very precise Card Holder Lists. The Card Holder must meet all of the criteria entered in all search fields on all 4 Tabs in order to be in the list.

Click here to sort the results of the Card Holder search **by Card number** instead of by Name.

Enter the specifying criteria for the search on any or all-4 Search Tabs and click on OK.

Card Holder - Search Cards

The **Search Cards Tab** allows for the Card Holders to be Searched by any of the Card data such as the encoded card number, the imprinted card number, the number of days since the card had been used, or a pending start and stop date.



Enter the internal working or **Encoded Number** of the card.

Enter the **Imprinted Card Number** that is found printed on the card.

Specify the **Number of days** the card would not have been used since.

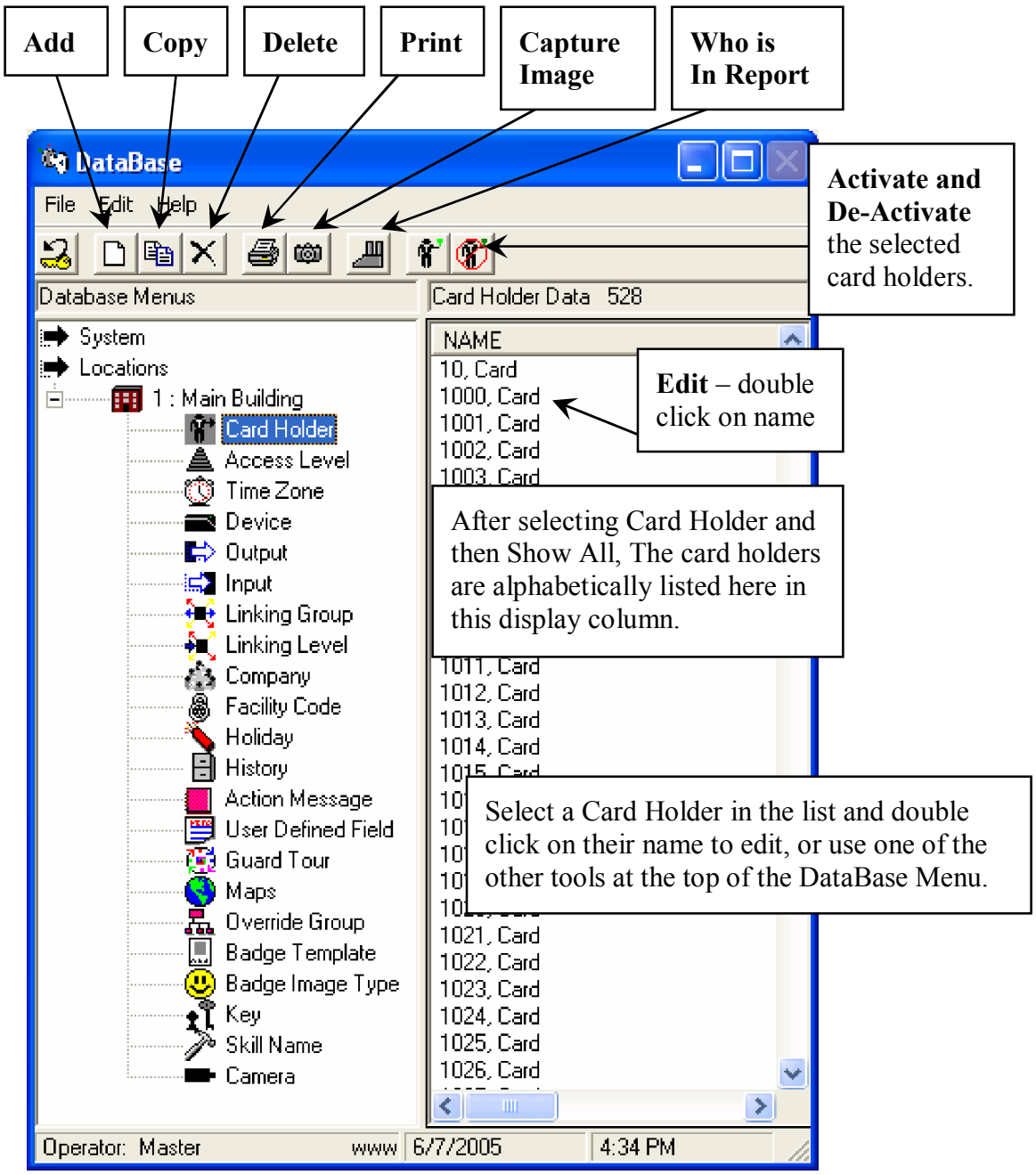
Include where Start and Stop Date is Between. Use the drop down calendar selection box to set a range of dates to find cardholders that have a Start and/or Stop date within that range. This search can be useful to find Card Holders whose cards have been set to turn on or off on a certain date.

Specify if the code(s) to be searched for must have the Guard **Tour** feature enabled - **True, False, or Either.**

Include where status is:
Set the status of the Card Holder you wish to include in the Search. Click on Active, Inactive, or Either to set the search status appropriately. Active are those cards that are operational in the system. Inactive is those cards that have been turned off and no longer functional. Select Either if the active status should have no bearing on the search.

Once the **Card Holder search is complete** click on OK and you are returned to the location in the software that you requested the Card Holder Search from. This could be Card Holder Reports, History, DataBase/Card Holder.

Card Holder – View List

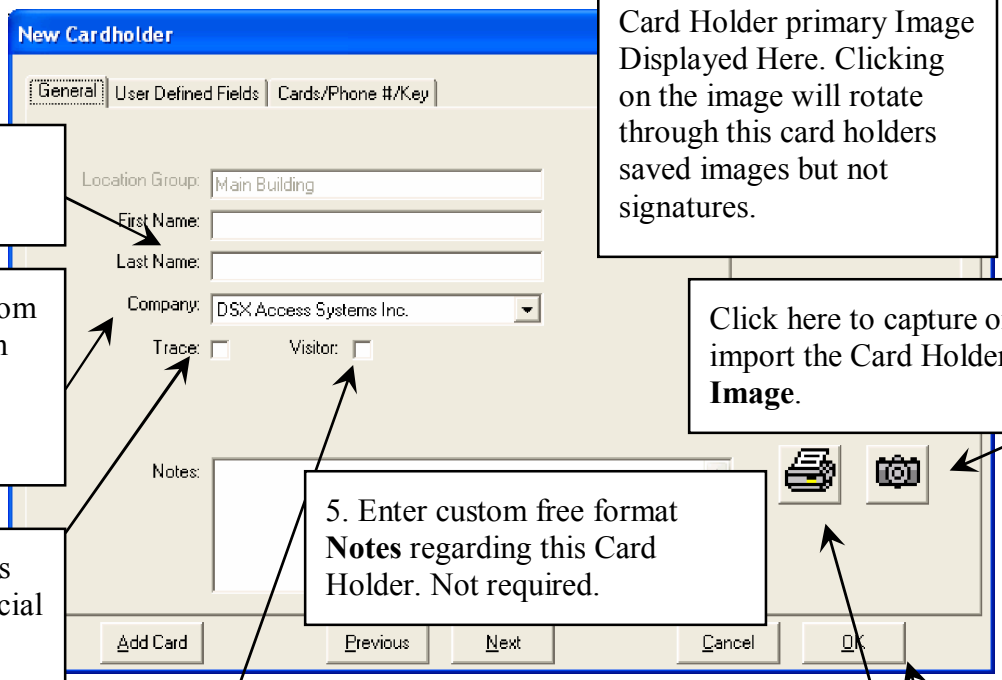


Card Holder - General Tab

This is the **Card Holder** Data Entry Screen. The General Tab is where the Card Holder name is entered with the options of Trace, Visitor Status, and Custom Notes. The General Tab information is the only data that is required to enter a person into the database. The Card Holders Image can also be taken and an Identification Badge printed using the ICONS in the lower right corner of the screen.

The User Defined Fields are located on the center tab. UDFs are only required when a UDF field is defined as required Data.

The Cards Tab is only required to issue the person an access code, enter the card holders phone numbers, and assign any Keys and/or Skills.



1. Enter First and Last names.

2. Select a Company from the drop down selection list.
Jump to page 59.

3. Select **Trace** if it is desired to have a special annunciation and the persons image displayed each time the card is used at readers defined for Trace.

Card Holder primary Image Displayed Here. Clicking on the image will rotate through this card holders saved images but not signatures.

Click here to capture or import the Card Holder **Image**.

5. Enter custom free format **Notes** regarding this Card Holder. Not required.

4. Click here if this person is a **Visitor**.

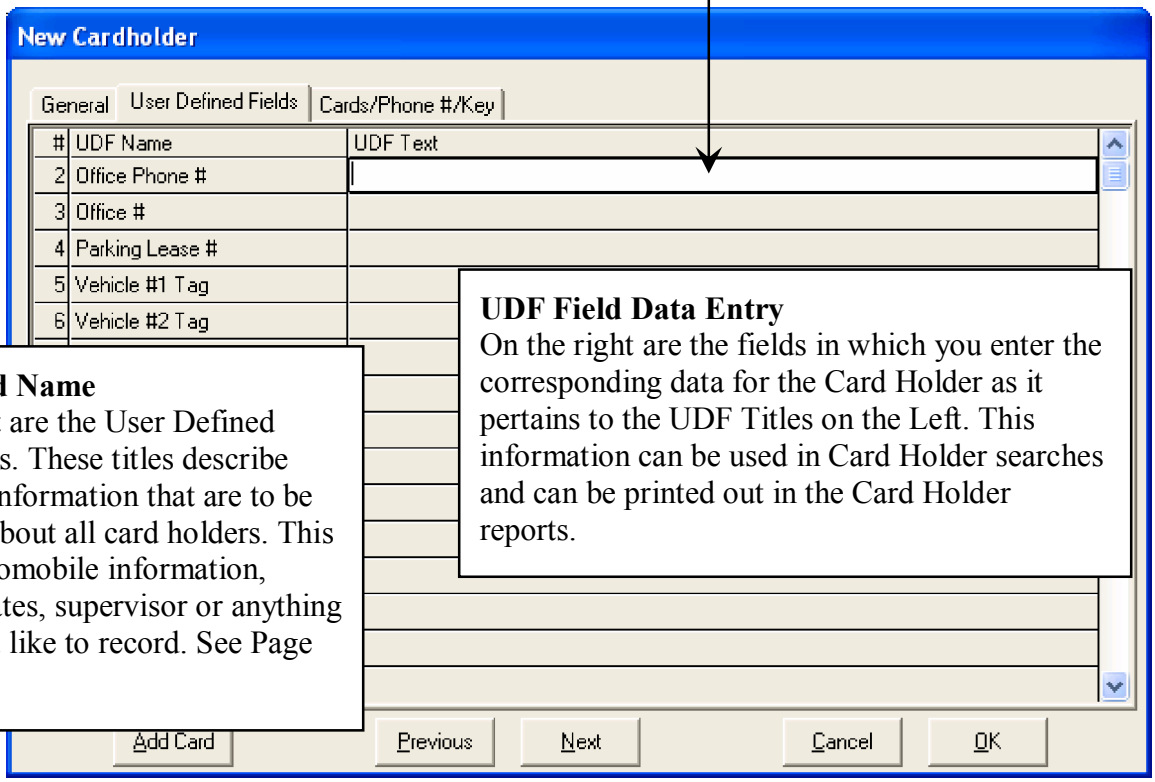
Click here to **print** the card holders Badge.

Add Card Quick-Load Button is used to enter a card number and access level first, allowing the system to start downloading to the field controllers, and then return here to input the Name, Company, and UDFs.

Click here when you are ready to **Save** all data under all 3 tabs.

Card Holder - UDF Tab

6. Enter the personal data for this Card Holder as it applies to each **User Defined Field** listed below left.



UDF Field Name
On the left are the User Defined Field Titles. These titles describe pieces of information that are to be recorded about all card holders. This can be automobile information, training dates, supervisor or anything you would like to record. See Page 61.

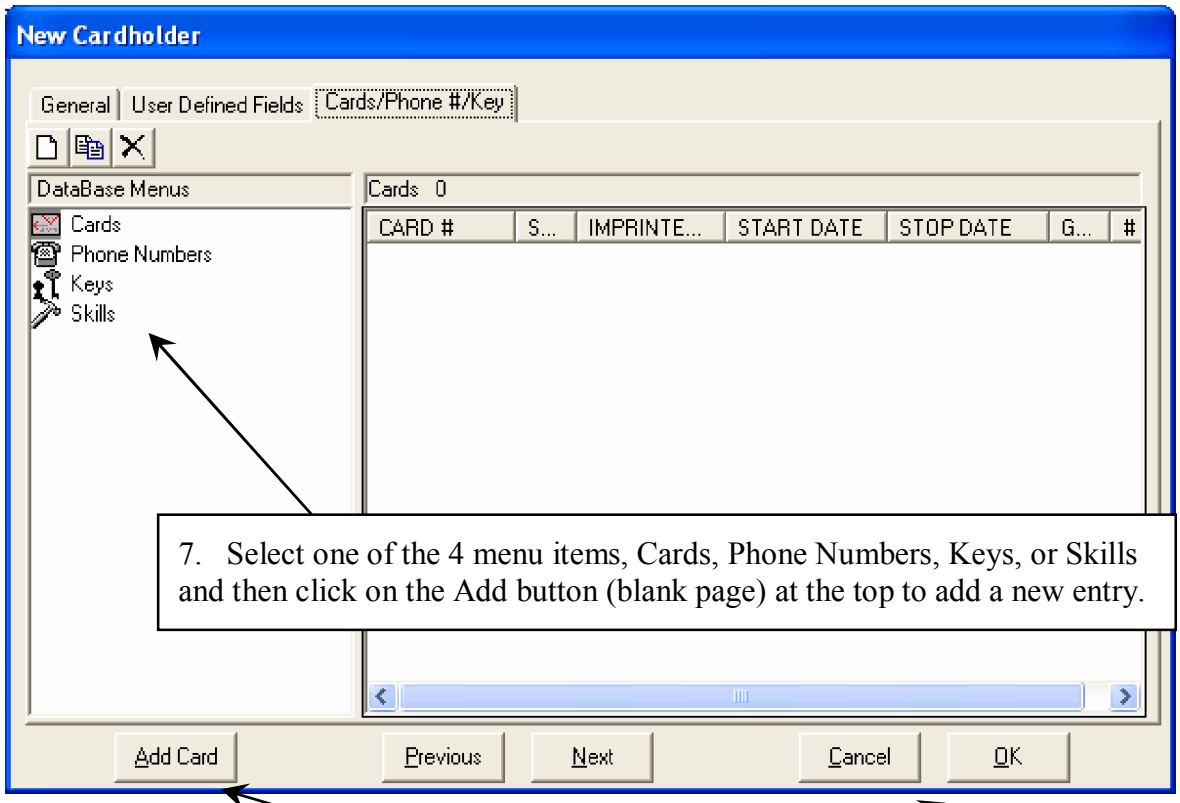
UDF Field Data Entry
On the right are the fields in which you enter the corresponding data for the Card Holder as it pertains to the UDF Titles on the Left. This information can be used in Card Holder searches and can be printed out in the Card Holder reports.

Click here when you are ready to **Save** all data under all 3 tabs.

Card Holder – Cards Tab

This is where Access **Cards**/Keypad Codes, **Phone Numbers**, **Keys**, and **Skills** are assigned to the Card Holder. Card Holders can be assigned any or all of these items but it is not required.

Card Holders can have more than one card or code. Each Card can a different Access Level and Output Linking Level. When locations are grouped, each card can have an access level that works for any or all of the Locations in the Location Group.



7. Select one of the 4 menu items, Cards, Phone Numbers, Keys, or Skills and then click on the Add button (blank page) at the top to add a new entry.

If you started adding this code by selecting the **Add Card Quick Load** button from the General Tab, you need to Click on the General Tab after the code has been added and before you click on OK, to enter the name.

If you have already completed the General and UDF tab screens click on OK

For information on **Phone Numbers and Keys see pages 45-46.**

Card Holder – New Card

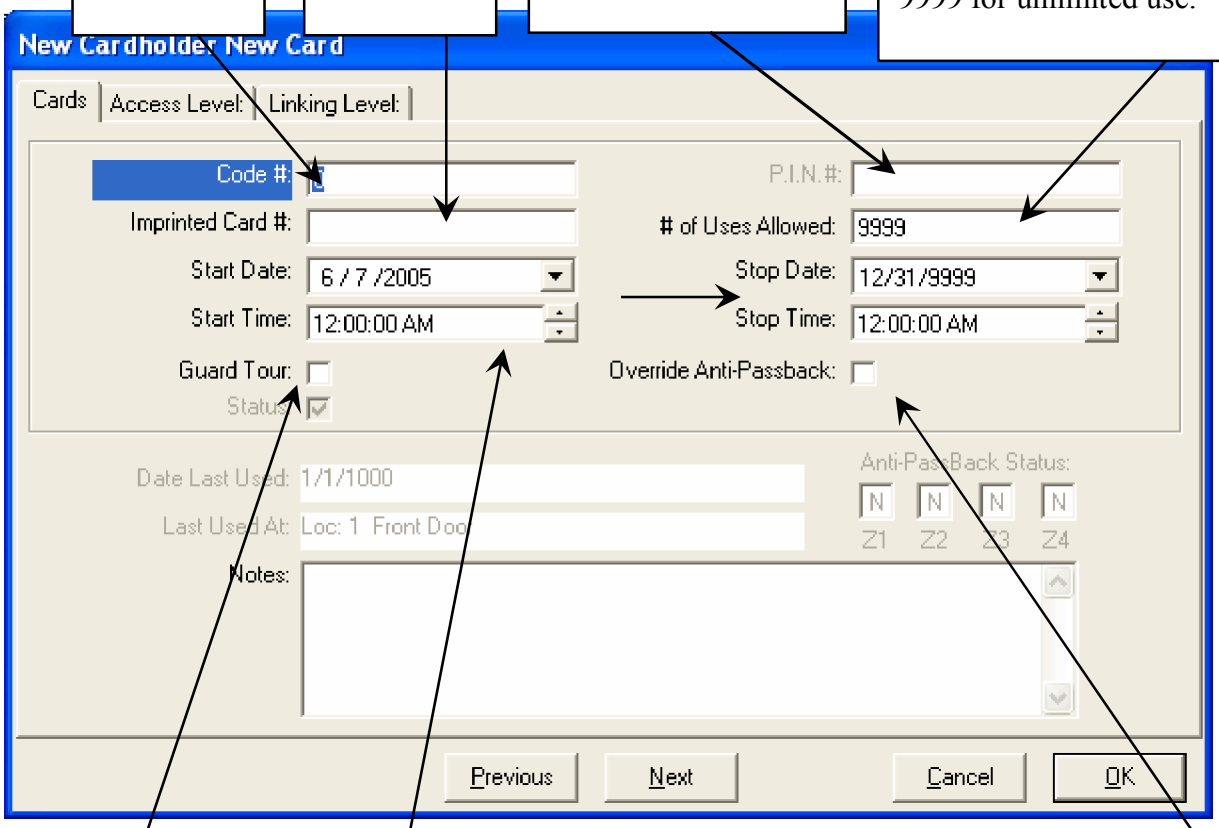
Enter the **Code** number and complete all other necessary information about this New Cardholder on the Cards tab screen. Then click on the Access Level Tab to assign an access level and optionally on the Output Linking Level Tab to assign a Linking Level (elevator control) if necessary.

8. Enter the internal or **working number** of the card under code.

9. Enter the **number printed on the card**.

10. **P.I.N.** is an optional keypad code that is entered when the system uses both card readers and keypads.

11. Enter the **# of Uses** this card will be allowed. Once the card has been used this number of times it will be automatically de-activated. The default is 9999 for unlimited use.



12. Place a checkmark here if this code is to be used for **Guard Tour**.

13. Set the **Start and Stop Dates** and **Start and Stop Times** for this code. The Start Date defaults to the current system date. The Stop Date is set to a future date with a default of 12/31/9999 which provides unlimited use. The Start and Stop Times can be set in increments of 15 minutes.
The down arrow button to the right of each date field pulls down a calendar to assist in setting these to future dates.

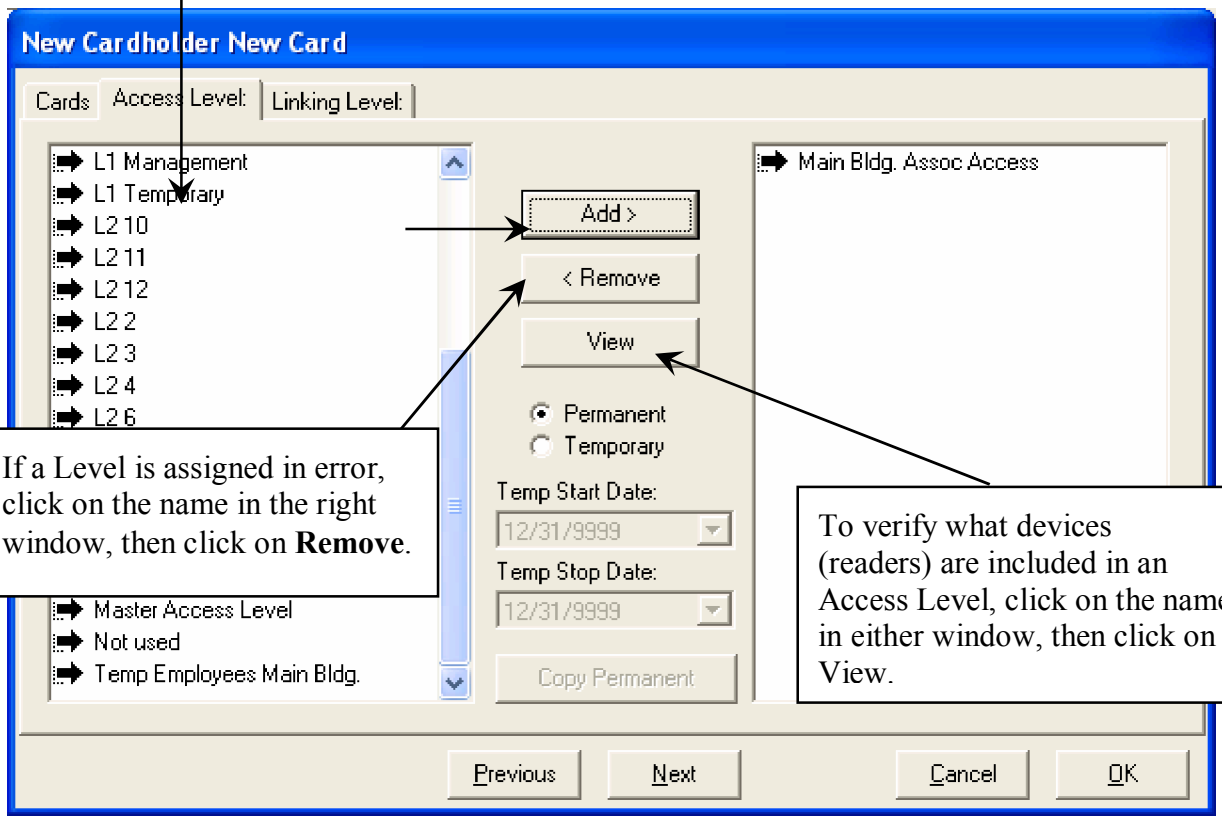
14. Place a checkmark here if this code is to be exempt from Anti-Passback.

Card Holder – New Card

Access Levels can be assigned to a Cardholder as either **Permanent or Temporary**.
To assign a Permanent Level, simply click on the name in the left window, then click Add.
To assign a Temporary Level, click on the name in the left window, click on Temporary, set the start and stop dates for the level to function, then click Add.

To see what Access Level a Cardholder has, you must return to this screen and click on both the Permanent and Temporary buttons to view what Access Level is still valid vs. an Access Level that may have expired.

15. Click on an Access Level name then click on **Add** to assign a Permanent Level. More than one Access Level can be assigned by repeating the process. When finished Click on OK to save.

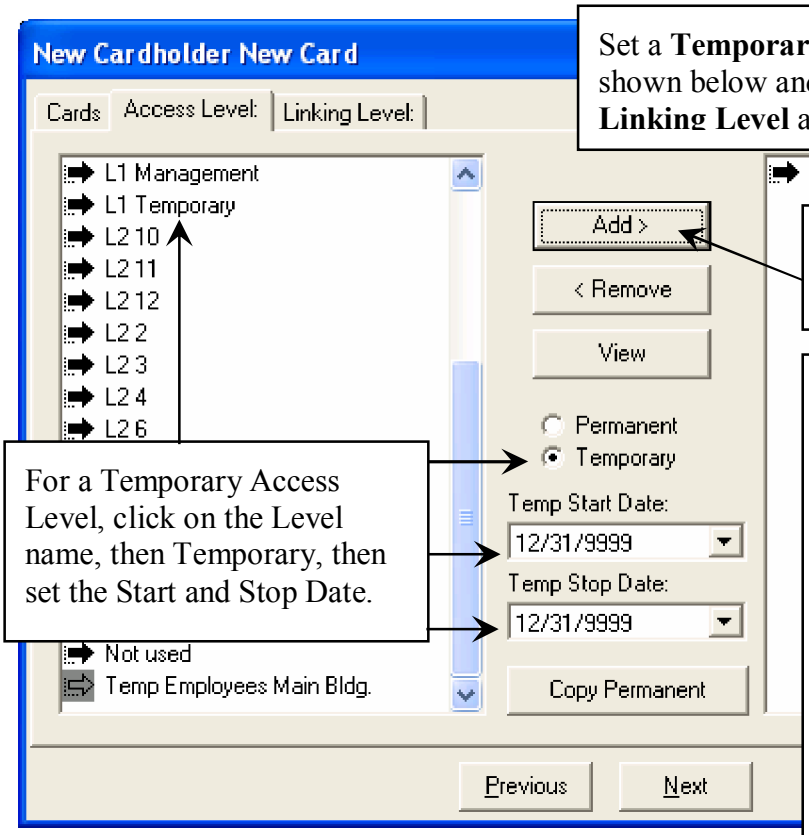


If a Level is assigned in error, click on the name in the right window, then click on **Remove**.

To verify what devices (readers) are included in an Access Level, click on the name in either window, then click on View.

Permanent Access Levels are those that stay with the card until the access level is removed from the card or the card is deleted. **Temporary Access Levels** are those that are assigned with a Start Date and a Stop Date. At the beginning of the day on the Start Date the Permanent Access Level is suspended and the Temporary one is activated and downloaded. The Temporary level is in effect until the Stop Date. At the end of the Stop Date the Original (permanent level) is re-instated and the Temporary Level is suspended.

Card Holder – New Card



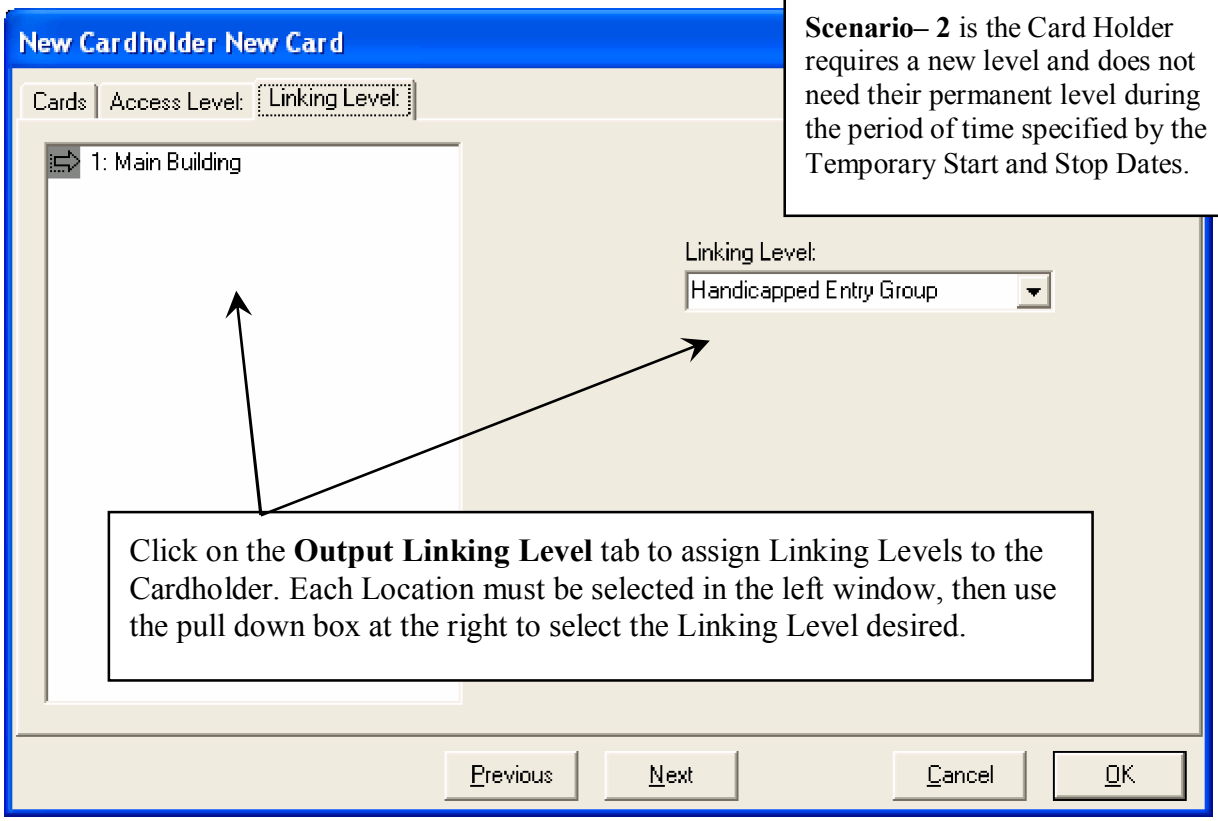
Set a **Temporary Access Level** if required as shown below and also set an optional **Output Linking Level** and Click on OK.

Click on Add to include this Temporary Level.

For a Temporary Access Level, click on the Level name, then Temporary, then set the Start and Stop Date.

There are basically two scenarios when issuing a Temporary Access Level.
Scenario– 1 is the Card Holder should have their Permanent Access Level as well as an additional Access Level during the period specified by the Temporary Start and Stop Date. In this case use the **Copy Permanent** Button to assign their Permanent Levels and then also select the additional levels necessary.

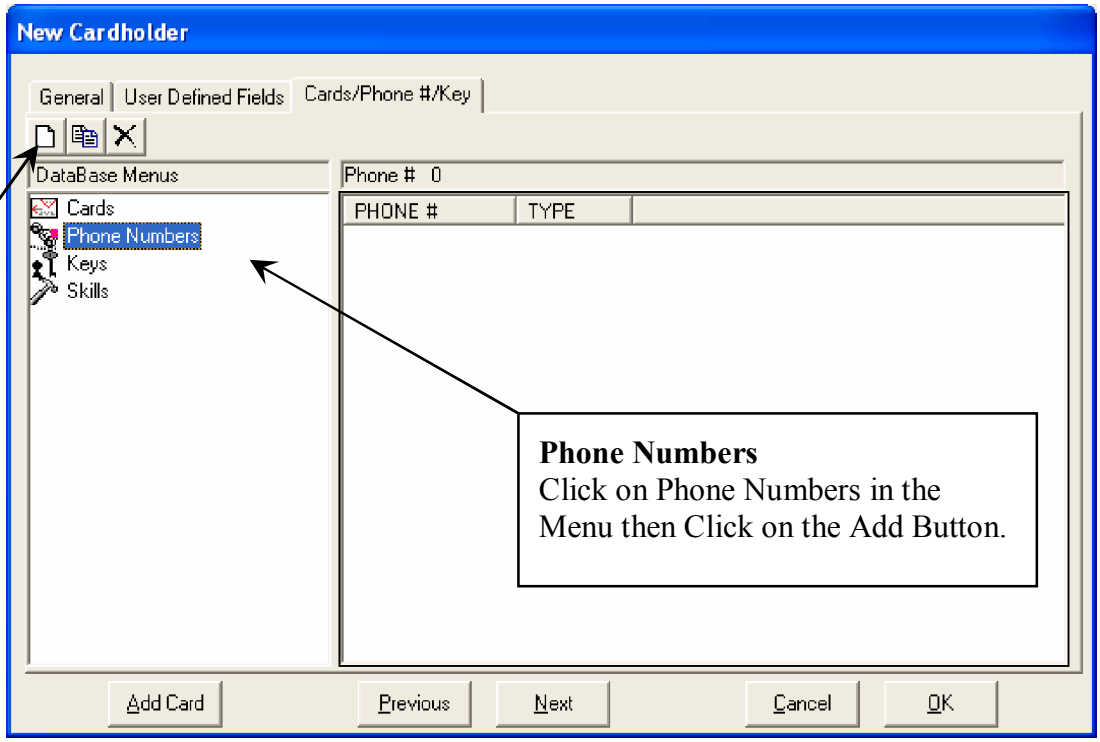
Scenario– 2 is the Card Holder requires a new level and does not need their permanent level during the period of time specified by the Temporary Start and Stop Dates.



Click on the **Output Linking Level** tab to assign Linking Levels to the Cardholder. Each Location must be selected in the left window, then use the pull down box at the right to select the Linking Level desired.

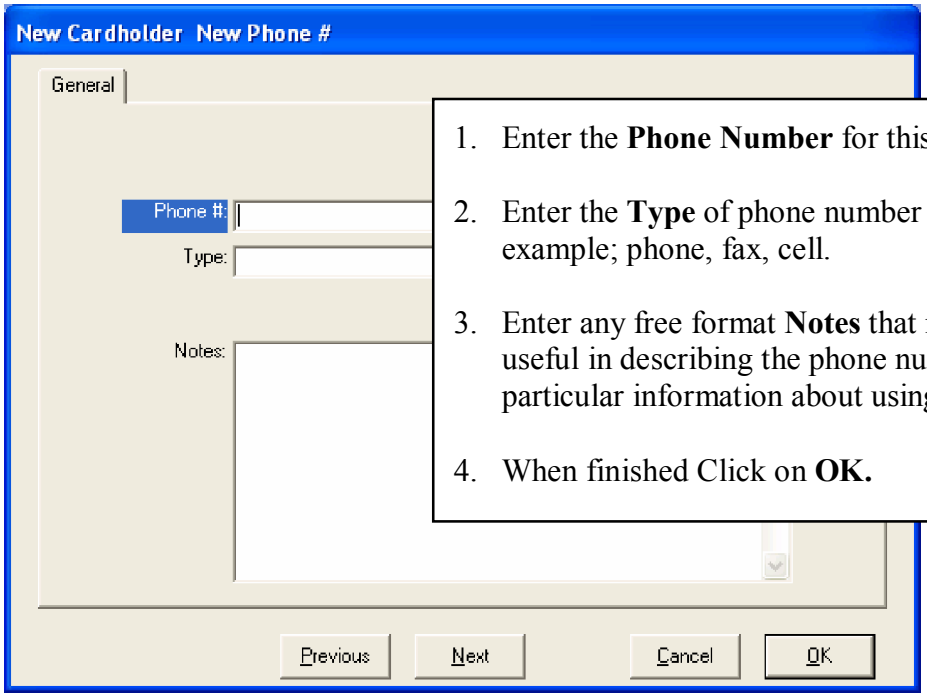
Card Holder – Phone

Enter the **Phone** number(s) and type for each Card Holder. Each Card Holder can have multiple phone numbers. Phone numbers are not required fields.



Add Button

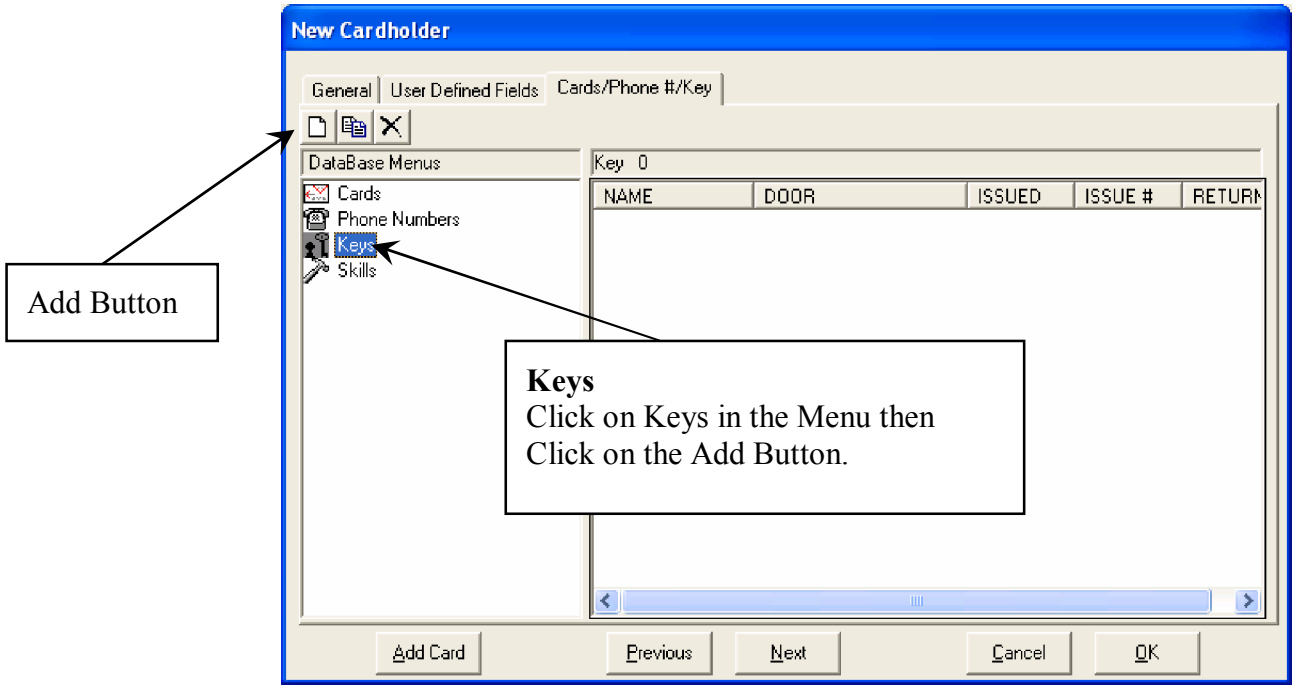
Phone Numbers
Click on Phone Numbers in the Menu then Click on the Add Button.

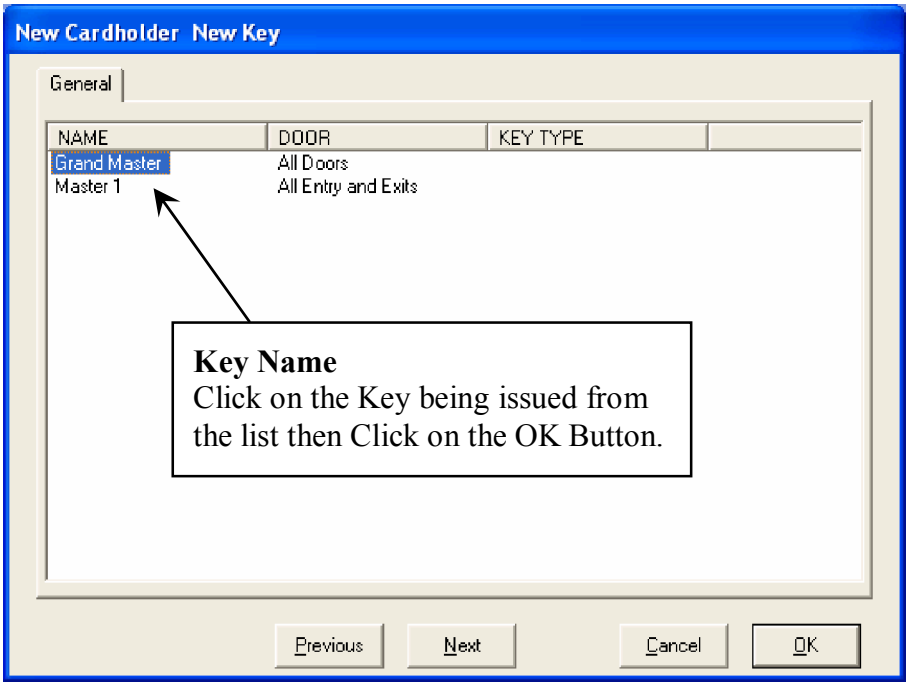


1. Enter the **Phone Number** for this Card Holder.
2. Enter the **Type** of phone number this is. For example; phone, fax, cell.
3. Enter any free format **Notes** that might be useful in describing the phone number or particular information about using it.
4. When finished Click on **OK.**

Card Holder – Keys

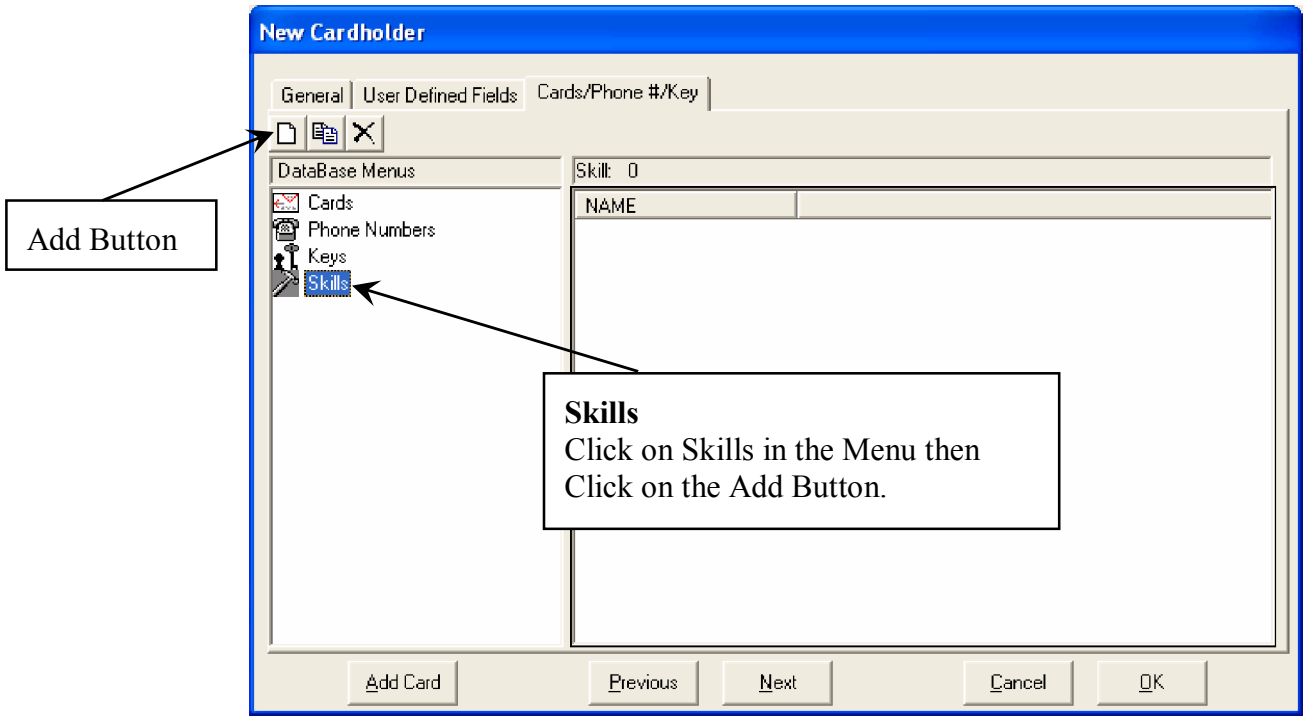
This is where **Keys** are issued to this Card Holder and viewed. This is a mechanical door lock key to equipment rooms, storage closets, emergency exits, or other locks that require hardware keys. Keys are first defined under the Location Menu / Keys.

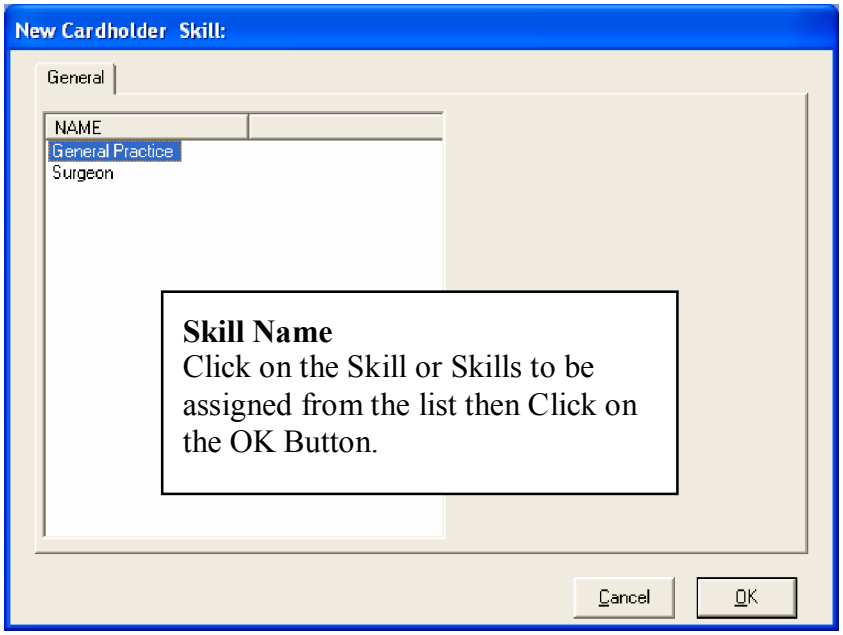




Card Holder – Skills

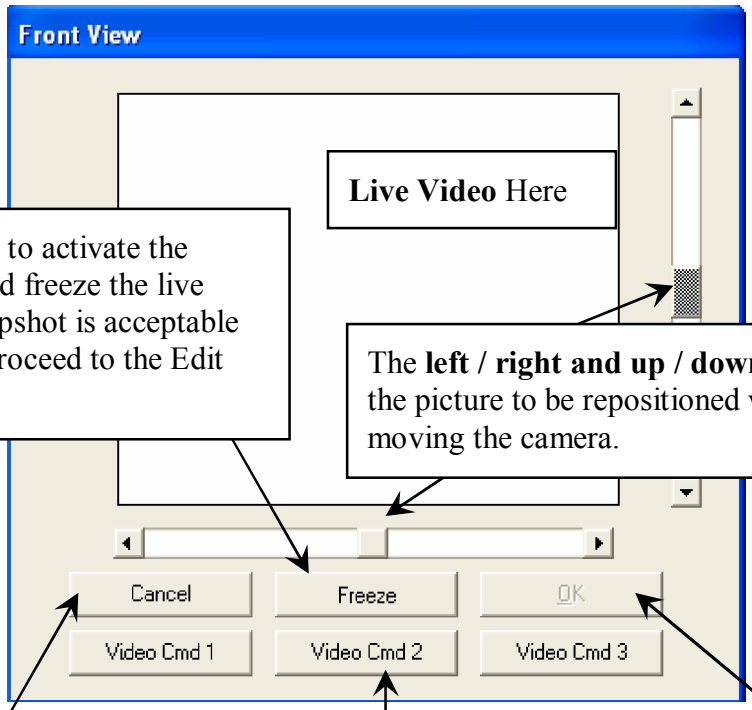
This is where **Skills** are assigned to this Card Holder and viewed. Skills can be any kind of trade, duty, or expertise. Card Holders can be searched for by Skill. This allows the operator to find Card Holders that possess a skill that is needed. Skills are first defined under the Location Menu / Skill Name.





Capture Card Holder Image

This is the **Live Video Image Capture Screen**. This is available when using the DSX Camera Kit. If Signatures have been implemented the signature screen will appear next. If live video is the primary source but file import is to be used as a secondary source, the live video will be defined under image source and type instead of file import. The live video screen will be displayed first and pressing Cancel will advance you to the image edit screen where File Import can be selected. If file import is the primary image source, there should be an image source and image type defined for it. The file import screen will appear when the camera icon is selected. This allows both live and imported images to be the primary images displayed with the card holder.



1. Select **Freeze** to activate the strobe (flash) and freeze the live video. If the snapshot is acceptable select OK and proceed to the Edit Image Screen.

The **left / right and up / down slide bars** allow the picture to be repositioned without physically moving the camera.

Select **Cancel** to return to live video if the frozen snapshot is not acceptable. If File Import is to be used instead of live video select cancel and advance to the Edit Image Screen. If Signatures have been implemented the signature screen will appear next.

2. Select **OK** to advance to the Edit Image Screen or if signatures are being used selecting OK will advance to the signature capture screen.

The **Video Cmd 1,2,3** buttons do not have any functions assigned by default. The buttons can be assigned preset contrast and brightness adjustments assigned or can be used to switch the source to the DSX capture card from RGB (DSX Camera) to composite (digital camera) and back. This information is detailed under Image Source on the Commands Screen.

Import Card Holder Image

This is the **Import Video Image Screen**. This is available in All WinDSX Software. If file import is the primary image source, there should be an image source and image type defined for it. The file import screen will appear when the camera icon is selected. If Signatures have been implemented the signature screen will appear next. If live video is the primary source but file import is to be used as a secondary source the live video will be defined under image source and type instead of file import. The live video screen will be displayed first and pressing Cancel will advance you to the image edit screen where File Import can be selected. This allows both live and imported images to be the primary images displayed with the card holder.

1. **Image Import** is initiated by clicking in the file name field indicated. Select the File that you wish to use for this Card Holders Image. The File Import Navigation Screen will default to the WinDSX\Images subdirectory. If the file of choice is in another directory navigate to the file and select it. Once selected the file is saved in the file format defined under Image Source in Setup. The copy is saved in the Images subdirectory and is typically saved in a *.JPG format.

Selected Image is where the Image chosen for import is previewed before being saved.

Click on **Cancel** to bypass the file import and go directly to the edit image screen.

2. Click on **OK** to continue when the desired image is in view and proceed to either, the signature capture or edit image screen.

Edit Card Holder Image

From the **Edit Image** Screen the Image selected can be edited manually with the controls located in the lower left section of the screen. Use any of the property controls as well as the Crop Image tool to make changes to the Card Holders stored image.

The Image just captured or imported will be displayed in the Card Holder Image Window to the right. If there are other Image Types defined select an **Image Type** and the associated Image will be displayed.

Click on the **Control Slide Bars** to make changes to the Image. The slide bar can be moved precisely to make the exact change necessary. The **Restore Image** can be used until it is saved.

Use the **Cropping Frame** to better center the subject or to remove unwanted background.

Click on **OK** when finished.

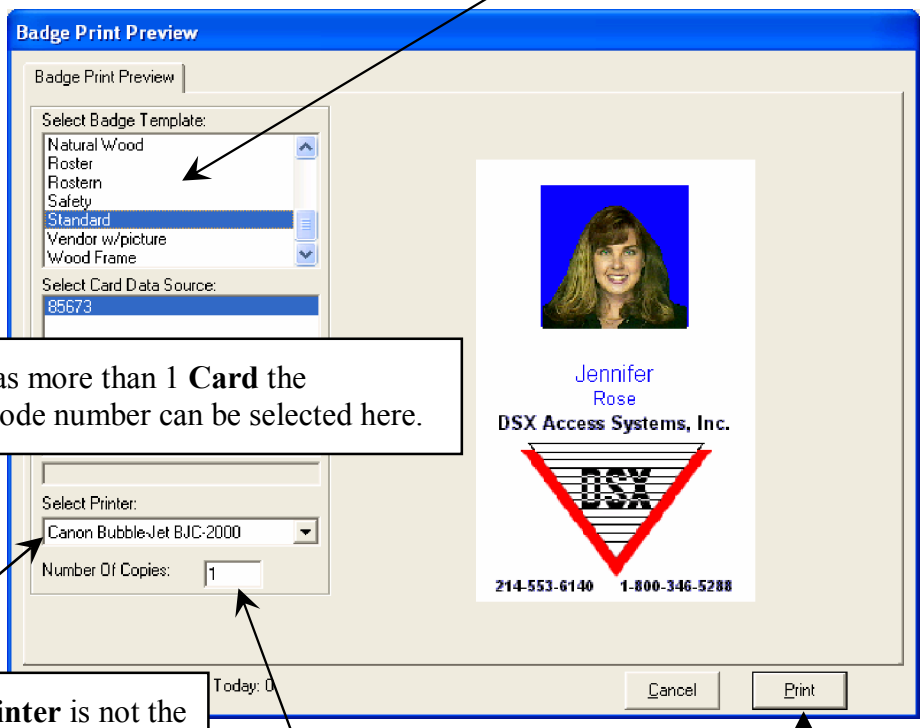
Click on **Re-Capture Image** to retake the image of the Image Type selected. Clicking here will take you to the File Import or Image Capture Screens depending on What Image Type has been selected on the left.

Click on this **Import File** Button to import the card holders picture. This button is typically used where image files from an off-site facility could be used as the primary image instead of the live video capture that is typically performed for the card holders on-site.

The **Auto Edit Image** screen automatically applies 12 different adjustments to the image and displays each one in a different frame. The Image is automatically adjusted 12 different ways and displayed in separate frames. Click on the Image that best suits your taste and then return to the Edit Image Tab where the image can be edited further and saved by clicking on OK.

Print Card Holder Badge

When a Card Holder is selected and the Printer ICON is clicked on, the **Badge Print Preview** screen is displayed. From here the Badge Template that is assigned to this Card Holder's Company is shown with the Card Holder Image. If a different template is required, it can be selected at this time. To change templates, double click on the desired template.



If the Card Holder has more than 1 **Card** the appropriate card or code number can be selected here.

If the **Card Printer** is not the Default Windows Printer click on the printer drop down selection box and choose the direct card printer.

If it is desired to print more than one copy of the badge enter the **Number of Copies** here.

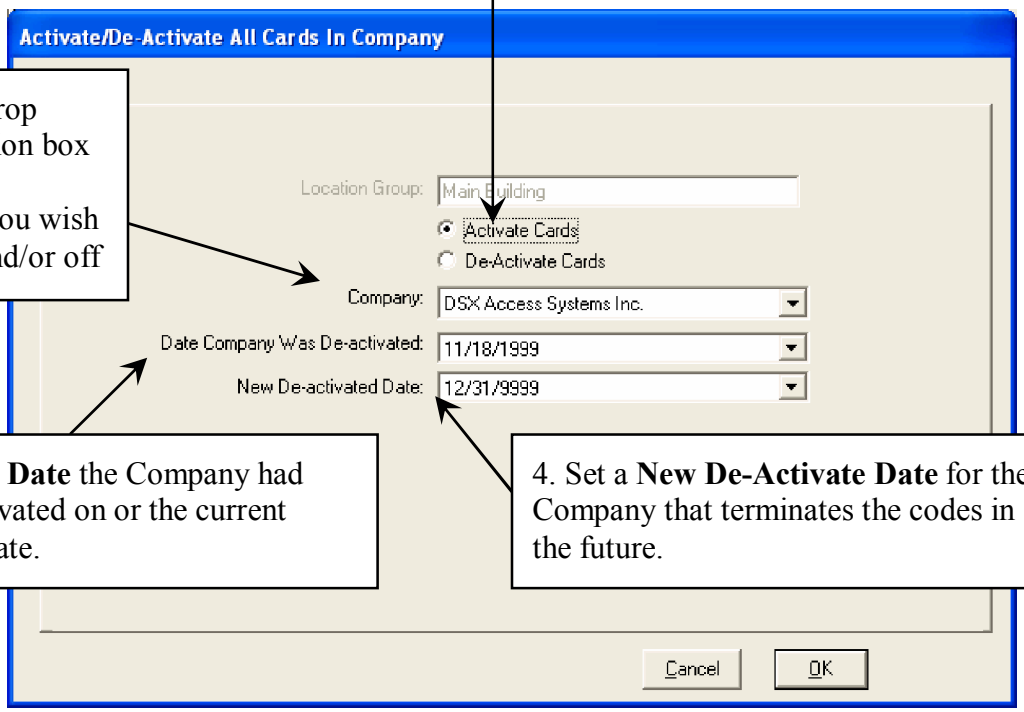
Click on the **Print** Button to print this card holder with this card number on the badge template.

Activate/De-activate Company

Set Card Status For **Company** - Activate Cards that are assigned to the Company selected. You can further describe the codes you wish to activate by the date in which they were de-activated. Codes in the same company that have a different de-activate date would not be re-activated. Codes can also be re-activated individually under Card Holders/Cards.

1. Select **Activate** Cards to **enable**.

Select **De-Activate** Cards to **disable**



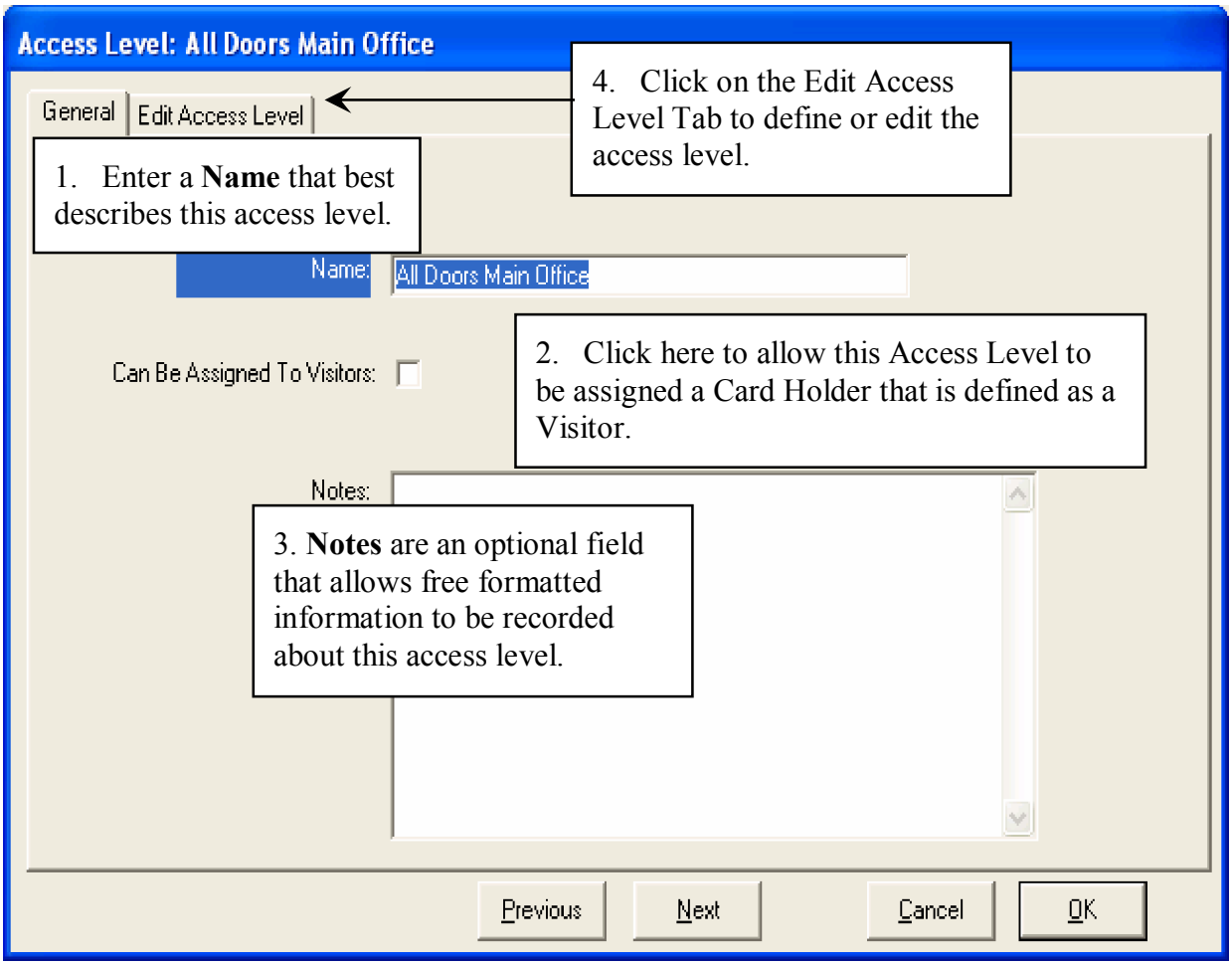
2. Use the drop down selection box to select the **Company** you wish to turn on and/or off

3. Select the **Date** the Company had been de-activated on or the current deactivate date.

4. Set a **New De-Activate Date** for the Company that terminates the codes in the future.

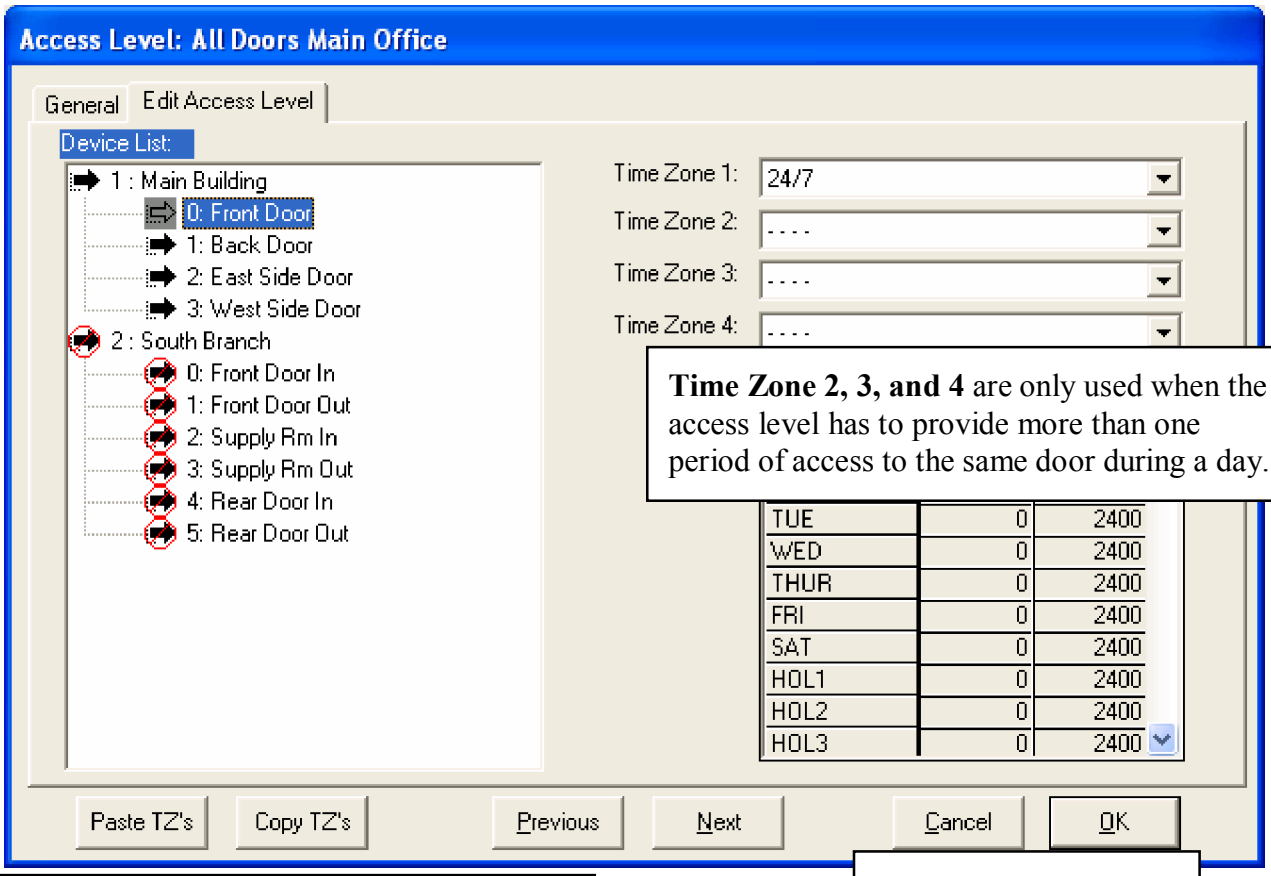
Access Level

These are the **Access Level** Data Entry Screens. Access Levels are the describing elements that determine what readers or keypads the card or code will work at. It also describes which days and at what times on those days the card or code will allow entry. The Edit Access Level Tab is where the Devices and Time Zones are mated to form the Access Level.



Access Level

Access Levels can be created to include readers from different locations, but only from within the same Location Group. In this example, the Level shown includes all devices in Location 1, and the first two devices in Location 2. If a Location does not have the same Group Name, it will not appear in the list and not be available for inclusion in the Level being defined.



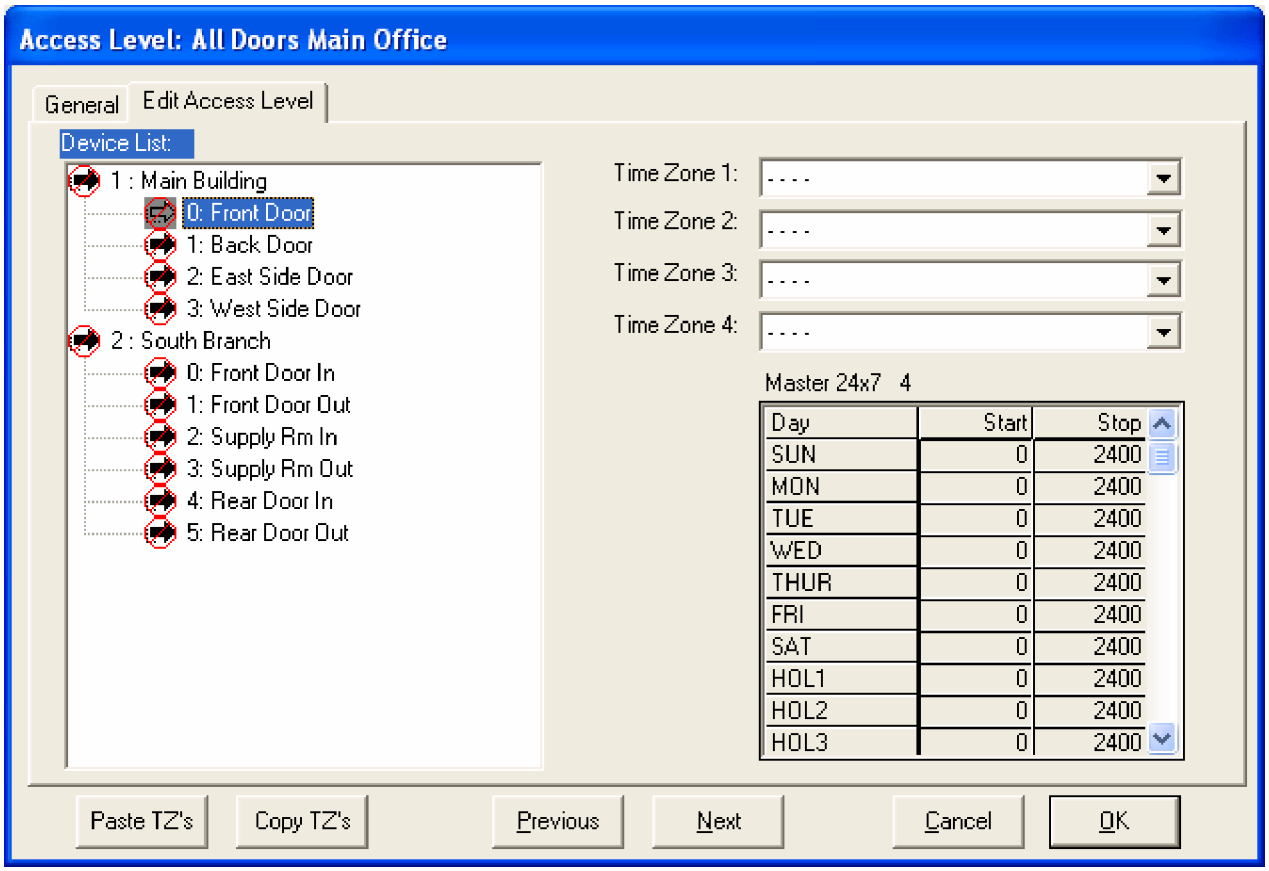
Time Zone 2, 3, and 4 are only used when the access level has to provide more than one period of access to the same door during a day.

5. Select a **Device** (door or reader location) above by clicking on it once. Then select a time zone from the **Time Zone 1** drop down selection box. This will remove the not/symbol from the device and the time zone definition is displayed in the graph to the right. After setting the Time Zone on one device click on the CopyTZ's button below, then click on another desired device and click the Paste TZ's button.

6. After assigning the appropriate doors the appropriate time zones click on **OK.**

Access Level

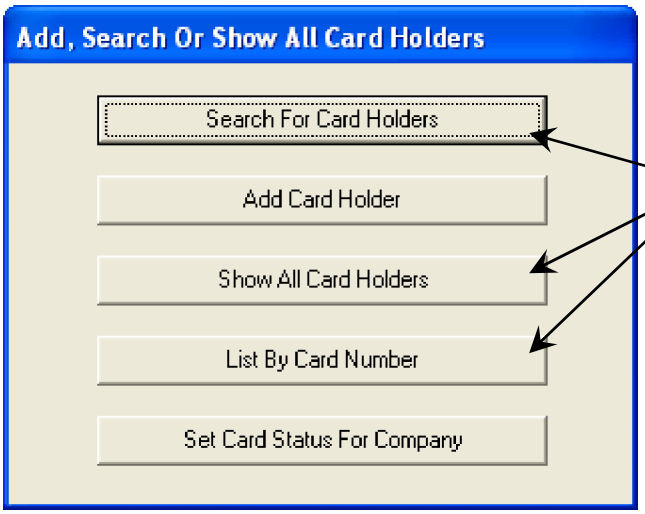
To **remove a door** (reader) from an Access Level, click on the name in the left window, then remove any Time Zone references to the right by choosing the four dashes from the dropdown time zone list.



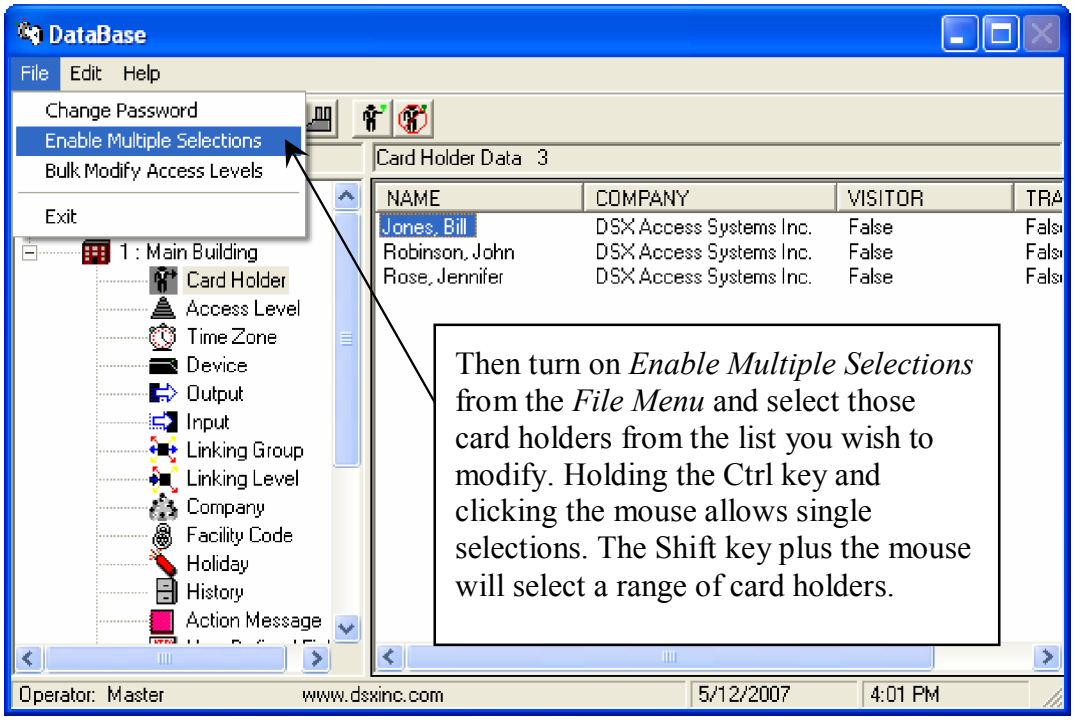
The Paste and Copy TZ buttons can be useful when multiple doors/readers are to allow access during the same time period. To use, click on a door/reader name that has the Time Zone you wish to apply to other devices, then click on Copy TZ's. Select other doors/readers one at a time WITHIN THE SAME LOCATION and then click on Paste TZ's. This can also be used to remove multiple doors from an Access Level by first selecting a device with the NOT symbol, click Copy TZ's, then selecting Paste TZ's after selecting the readers to be removed.

Bulk Modify Access Levels

This feature allows for multiple card holders to have their access level modified at once.

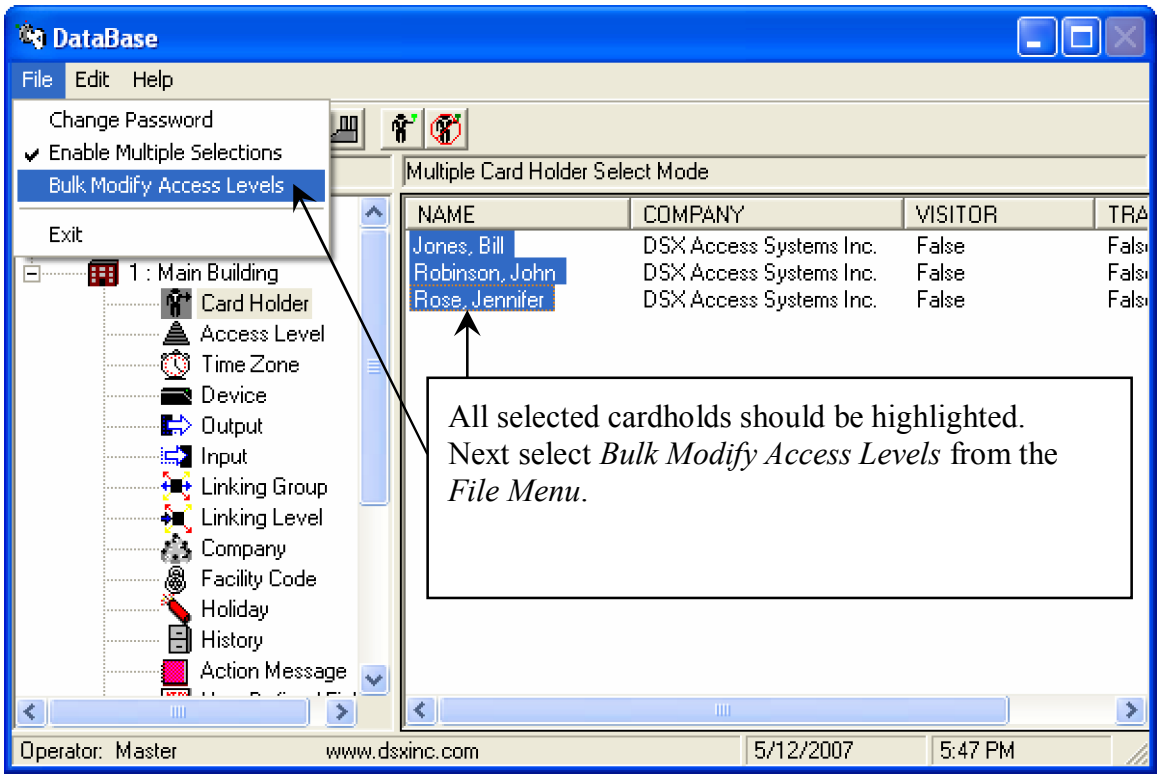


To use this feature first list the card holders that you want to modify by doing a Search, Show All, or List by Card Number.



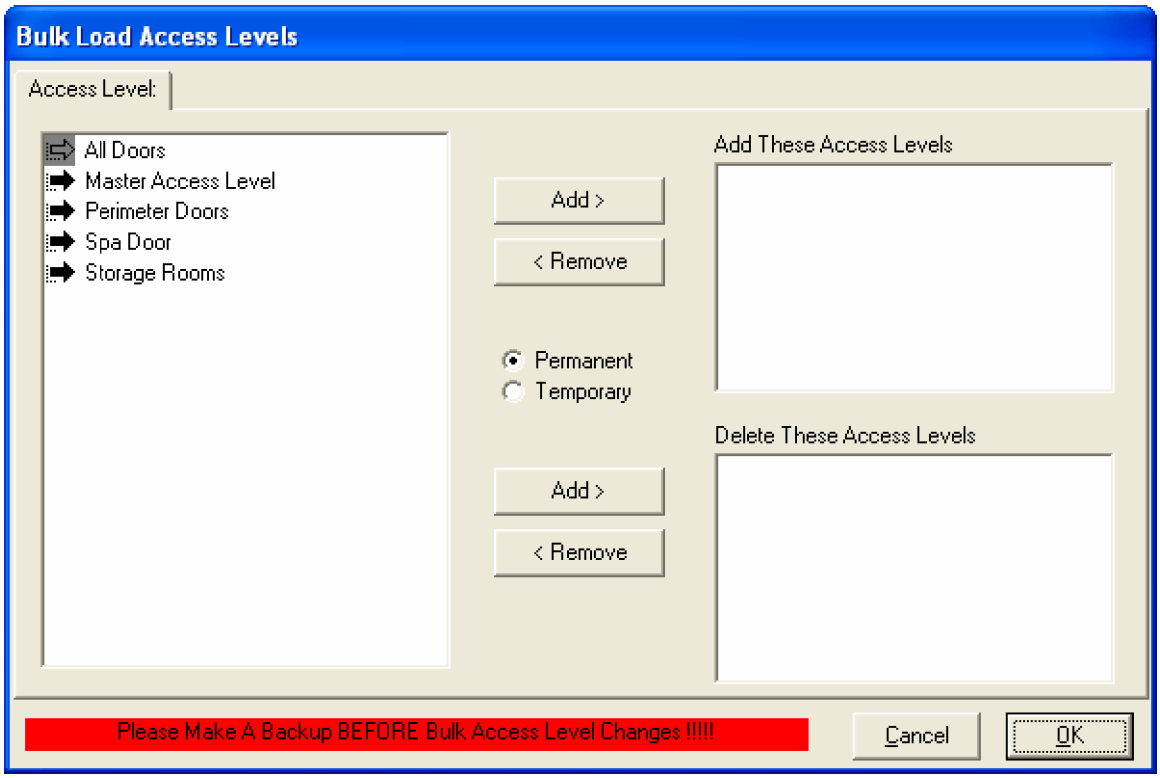
Then turn on *Enable Multiple Selections* from the *File Menu* and select those card holders from the list you wish to modify. Holding the Ctrl key and clicking the mouse allows single selections. The Shift key plus the mouse will select a range of card holders.

Bulk Modify Access Levels



The screen below will appear. Press F1 at anytime for a Help Screen. Note the warning in RED to make a backup before making Bulk Changes ! ! !

See Page 23.

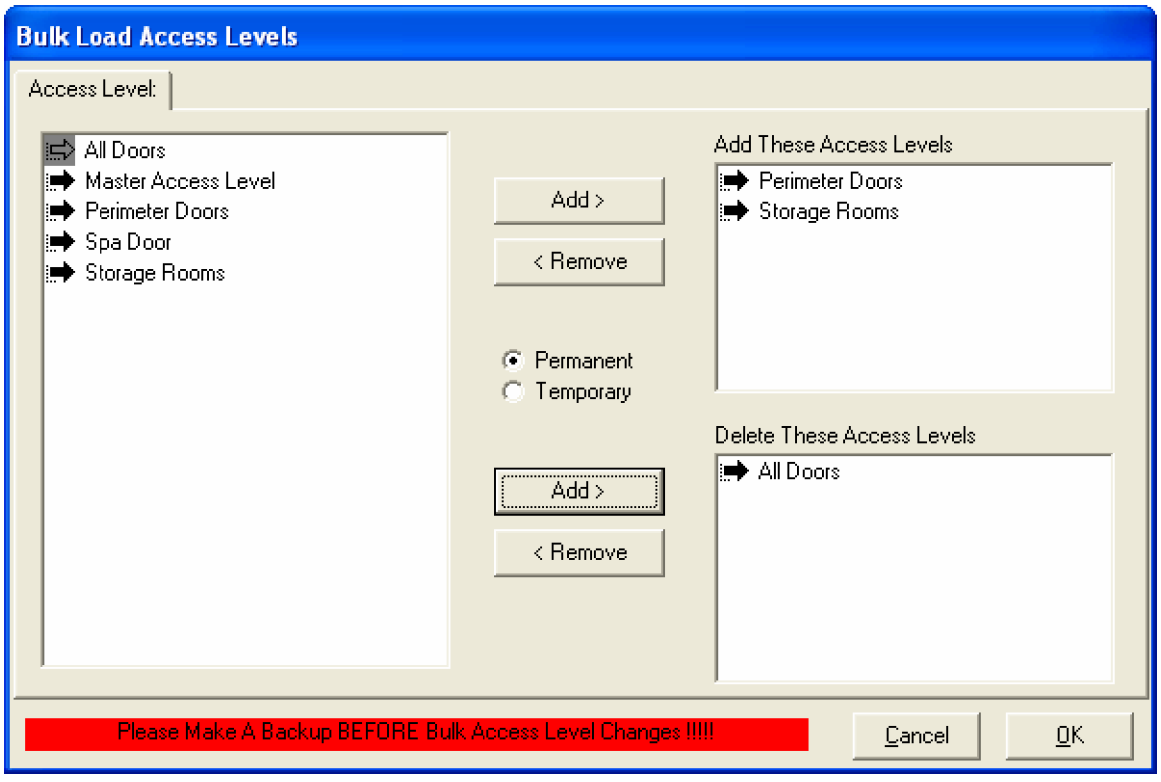


Bulk Modify Access Levels

To Add Level(s), Select the Access Level you wish to add from the Access Level List below left. Click on the Level and then on the upper Add Button. Multiple Levels can be added at the same time. The Levels shown in the "Add These Access Levels" window on the right are the ones added to the selected cards.

To Remove Level(s), Select the Access Level you wish to remove from the Access Level List below left. Click on the Level and then on the lower Add Button. Multiple Levels can be removed at the same time. The Levels shown in the "Delete These Access Levels" window are the ones removed from the selected cards.

In the example below, all Cardholders selected on the previous page will have their previous Access Level of "All Doors" removed. At the same time, they will all be given "Perimeter Doors" and "Storage Rooms" access.



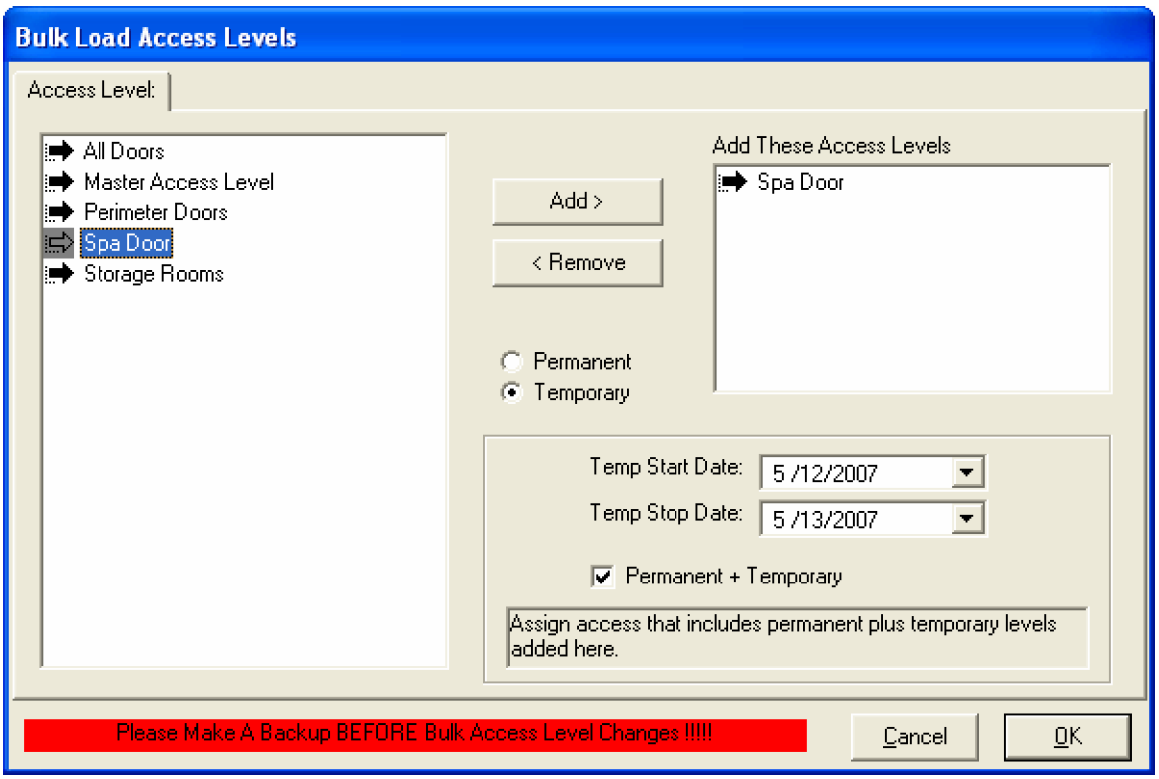
Bulk Modify Access Levels

To Add Temporary Level(s), Select the Access Level you wish to add from the Access Level List below left. Click on the Level and then on the Add Button. Multiple Levels can be added at the same time. The Levels shown in the "Add These Access Levels" window are the ones added to the selected cards.

Set the Start Date for the Temporary Access Levels to take control and the Stop Date for the card to revert back to its permanent access level.

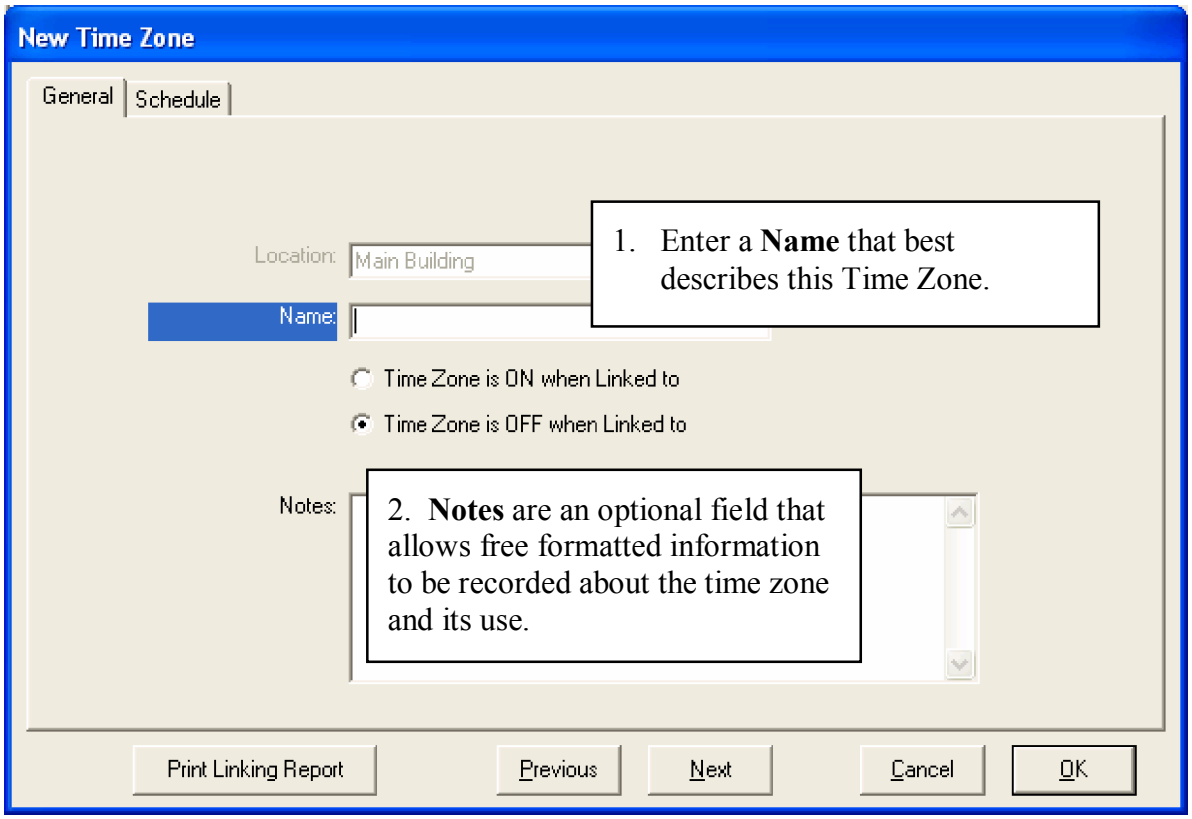
Select **Permanent + Temporary** if during this temporary period you wish for the card to have the Temporary Level in addition to its Permanent Level. By not selecting this option you are deciding that the Temporary Access Level assigned will be instead of the Permanent Level for the temporary period.

In the example below, all **selected Cardholders** will be given Temporary access to the "Spa Door" for the date(s) specified, while retaining their original Permanent Access Level assignments.
Press F1 at anytime for a Help Screen. Note the warning in RED to make a backup before making Bulk Changes ! ! ! See Page 23.



Time Zones

Most functions in an access system are controlled by "Time". "Time" may be the time of day, day of the week or day of the month. Time Zones are defined by the time of day and day of week.



Time Zones are the automatic time of day/day of week schedules where start and stop time parameters are defined to perform automatic functions such as lock/unlock doors, arm/disarm alarm monitor points, enable/disable readers, granting/denying card holder access, enable/disable image recall, and enable/disable alarm echo.

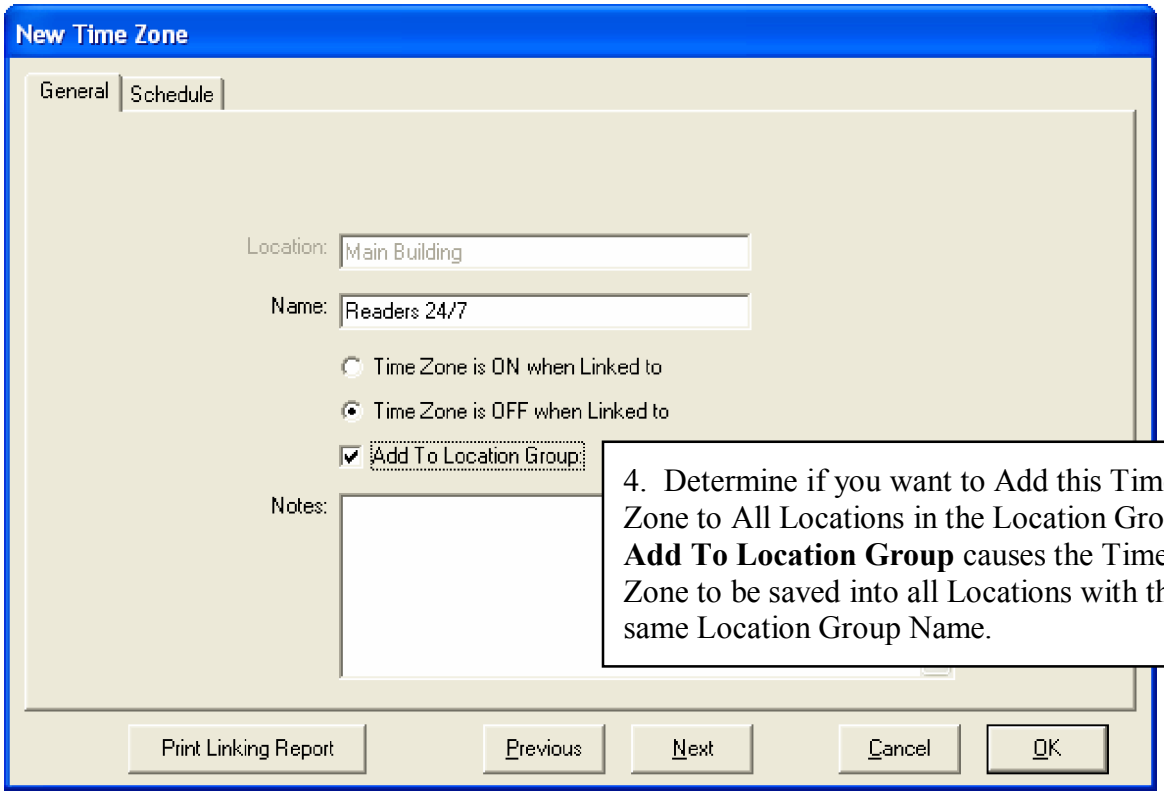
Time Zones

3. Set the state of this Time Zone using the **Time Zone Is On/Off when Linked to** selection**.**

Linking to a Time Zone can force it to a pre-selected state of on or off as selected in the time zone definition. Anything this Time Zone is assigned to is subsequently affected. This could be used to control Access Levels, Alarm Echo, Devices (readers/keypads), Event Filters, Image Recall, Inputs, Outputs, and Linking Groups.

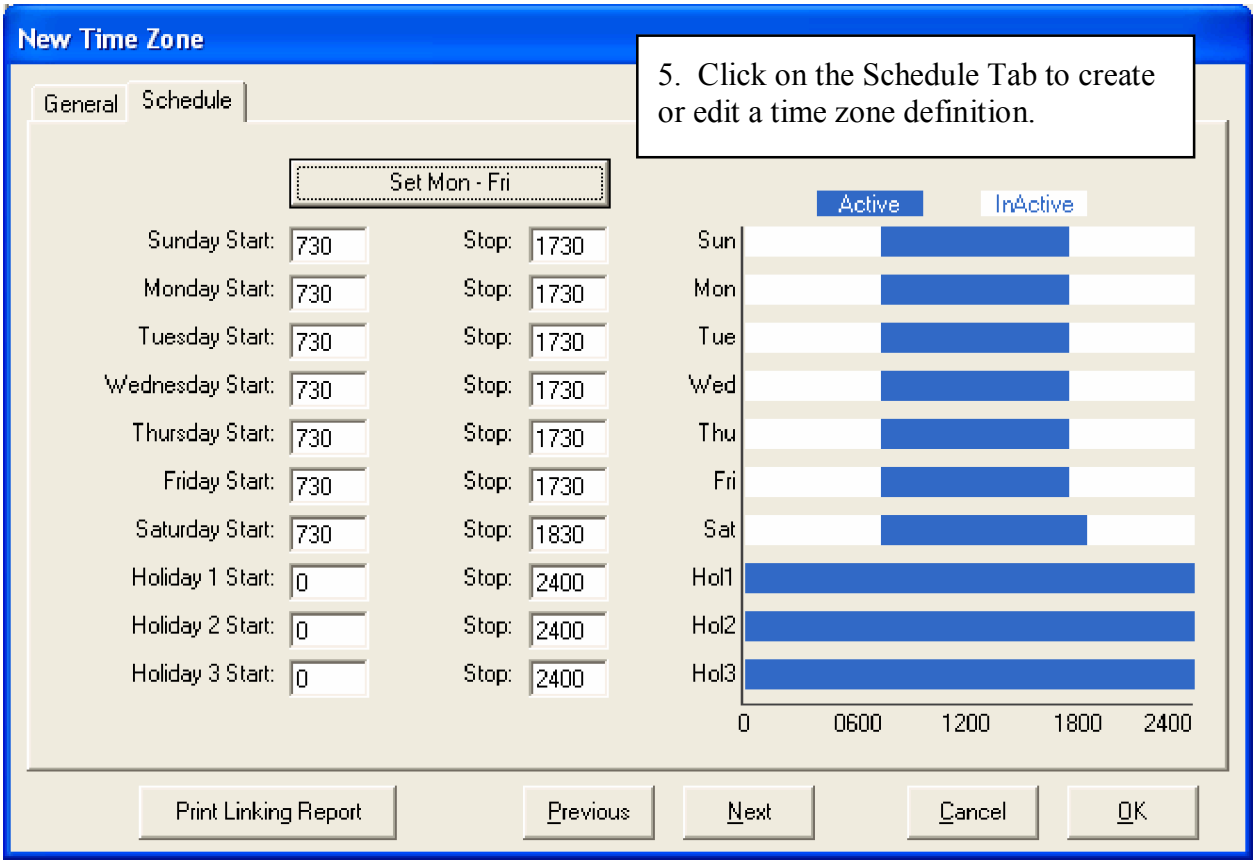
Note/// When linking to a Time Zone especially with a Latch or Toggle response make sure you have another link to it with a time zone response otherwise it may be impossible to get that Time Zone to follow its schedule instead of its forced state. Including a Time Zone in a Linking Group requires WinDSX© Version 3.7 and higher with controller firmware of 3114 and higher.

Do Not program a link to a Time Zone unless all field controllers have firmware version 3114 or higher! If you do you will have to delete the Linking Group from the database.



4. Determine if you want to Add this Time Zone to All Locations in the Location Group. **Add To Location Group** causes the Time Zone to be saved into all Locations with the same Location Group Name.

Time Zones



5. Click on the Schedule Tab to create or edit a time zone definition.

6. Set the **Start Time and Stop Time** for each day of the week and for Holidays 1,2,and 3.

Enter a Start and Stop time for Monday and Click on the **Set Mon-Fri** button to copy those times through Friday.

When Time Zones are used in Access Levels, the Start Time is when the card begins working.

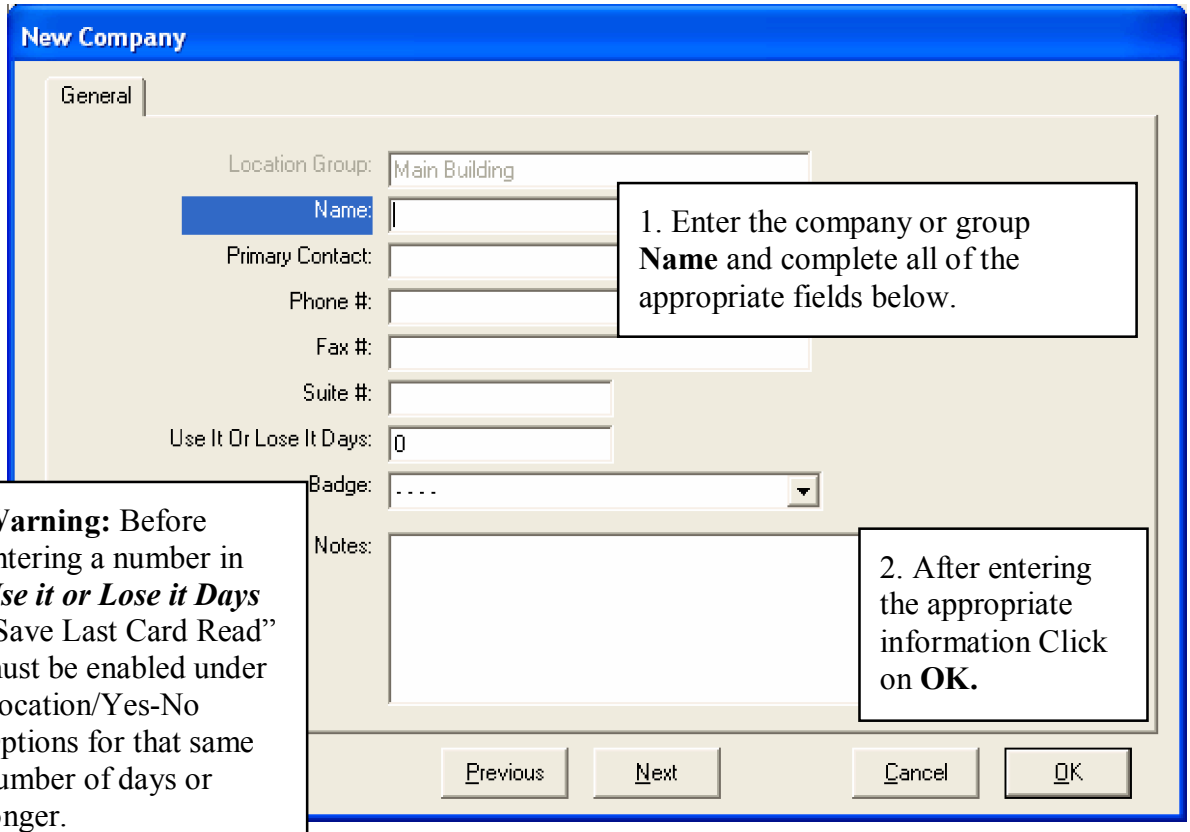
Enter the Start Time and Stop Time For each day. Create different Time Zones for each particular use such as Inputs, Outputs, Access Levels, and Devices. The Start Time is when the inputs arm, the outputs secure, the Readers or Keypads become operational and are required for entry. The Start Time is also when the Cards/Codes are operational and Image Recall is active.

The shaded part of the **graph** is the active part of the time zone.

7. After assigning the appropriate start and stop times click on **OK.**

Company

Companies are groups of Card Holders with something in common. The **Company** can signify a group or department or tenant. Companies are defined within a Location so that access codes may be grouped together for reports and searches. Company is not required data but a good organizational tool.



1. Enter the company or group **Name** and complete all of the appropriate fields below.

2. After entering the appropriate information Click on **OK.**

Warning: Before entering a number in ***Use it or Lose it Days*** "Save Last Card Read" must be enabled under Location/Yes-No Options for that same number of days or longer.

There are two management tools specific to Company but both are completely optional. The first is **Use it Or Lose it Days**. By setting a number here, all card holders assigned to this company must use their card within that number of days or their card is de-activated. This can be used to automatically manage lost cards and card holder attendance. See Warning Above before using!

The next tool is **Badge** for those that are using the integral Photo ID Badging features of WinDSX. This is where a Badge Template can be assigned to this Company so that all Card Holders in this Company automatically select this Badge Template when their card is printed. At the time of printing a different badge template can be chosen if required.

Holiday

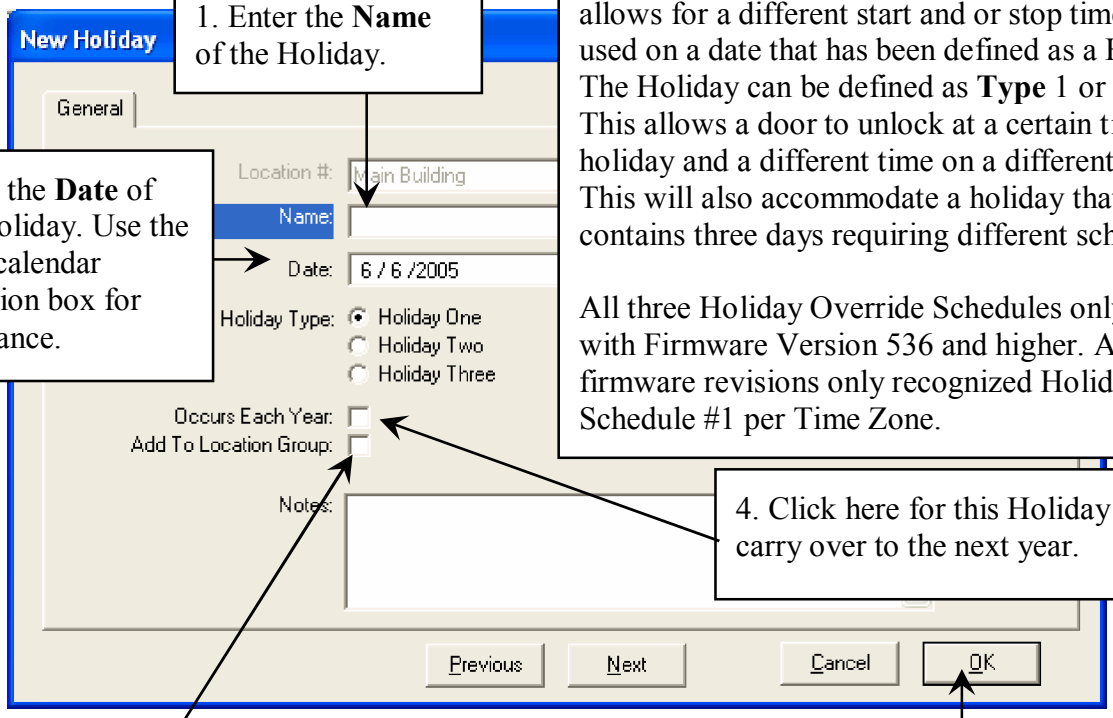
Certain Dates can be defined as a **Holiday** so that all time zones will follow a different time schedule on that day. This feature is used to override normal time zone parameters on a specific date. When a date is defined as a holiday, all time zones will follow the time schedule assigned for their holiday. All Time Zones have a day of week schedule with three holiday overrides. Three Holiday types are available with Firmware Version 536 and higher in the controllers.

1. Enter the **Name** of the Holiday.

2. Set the **Date** of the Holiday. Use the drop calendar selection box for assistance.

3. There are three possible holiday override schedules per Time Zone. The Holiday Schedule allows for a different start and or stop time to be used on a date that has been defined as a Holiday. The Holiday can be defined as **Type** 1 or 2 or 3. This allows a door to unlock at a certain time one holiday and a different time on a different holiday. This will also accommodate a holiday that contains three days requiring different schedules.

All three Holiday Override Schedules only work with Firmware Version 536 and higher. All Lower firmware revisions only recognized Holiday Schedule #1 per Time Zone.



4. Click here for this Holiday to carry over to the next year.

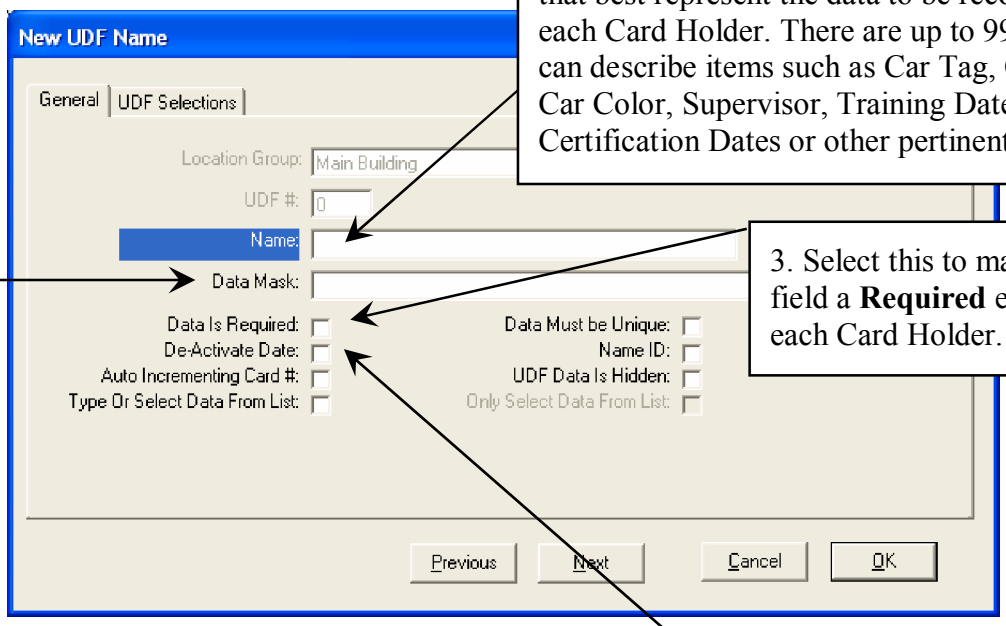
5. Click here if this Holiday is to be added to every location within the location group.

6. When the Holiday Name, Date, and Type are entered click on **OK.**

User Defined Fields

UDFs are titles assigned to 99 possible fields of which personal information for each Card Holder can be stored. These fields are not required unless defined to be so and are primarily for informational use only and have no effect on the performance of the system. Typical use of these fields is to store car tag numbers, phone numbers, employee numbers, etc using up to 50 characters each. The field can be defined as an Auto-Incrementing Card # for Badge purposes.

1. For UDF **Name** enter up to 20 characters that best represent the data to be recorded for each Card Holder. There are up to 99 fields that can describe items such as Car Tag, Car Make, Car Color, Supervisor, Training Dates, Certification Dates or other pertinent data.



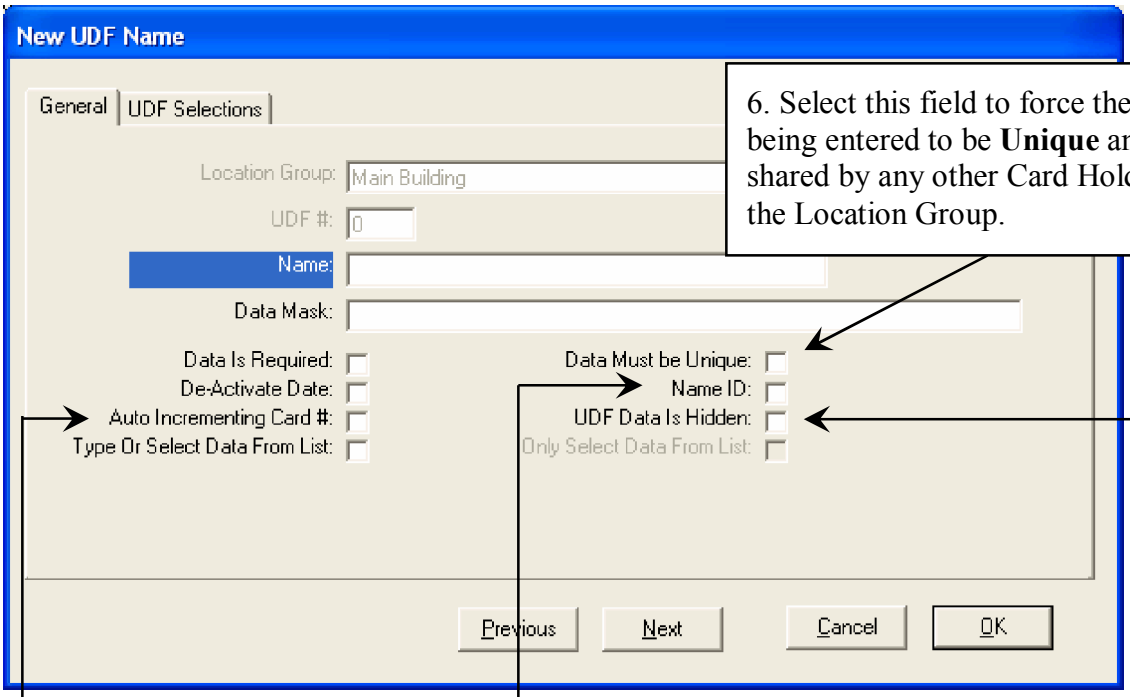
3. Select this to make the field a **Required** entry for each Card Holder.

2. A **Data Mask** entered here can be used to format the field for different purposes such as Date, Time, Phone Number or other useful structures. A Date Mask would be entered as ##/##/## which causes the spaces where the # is to be replaced with numeric entries and automatically advances the cursor to each segment when entering the date. Other symbols can be used for field separators such as: -, ( ), /. The data entry spaces are formatted with the use of special format commands such as" #"for numeric entries only,"" for alpha-characters only, and "&" for alphanumeric characters.

This type of Data Mask can force a particular type and number of characters in the correct form. This greatly improves consistency of the data being entered and assists in quick and precise searches for Card Holders.

4. Select this field to designate this UDF as a **de-activate date** for the card holder. The field should also be Masked as a date field.

User Defined Fields



6. Select this field to force the data being entered to be **Unique** and not shared by any other Card Holder in the Location Group.

5. Place a checkmark here to use this UDF field as an auto-incrementing card number. This field will become a card serial number typically used for badging applications. This UDF (data) field can be placed on a badge template so that each card printed can have a unique number printed on it that is automatically assigned and incremented. Each time a card is printed with a badge template that this field is on the system will prompt the operator to print the card as is or to increment the card number. The first time the card is printed the operator should opt not to increment the number. Each time the card is re-printed the operator could choose to increment the number based on whether the original card was retrieved or not.

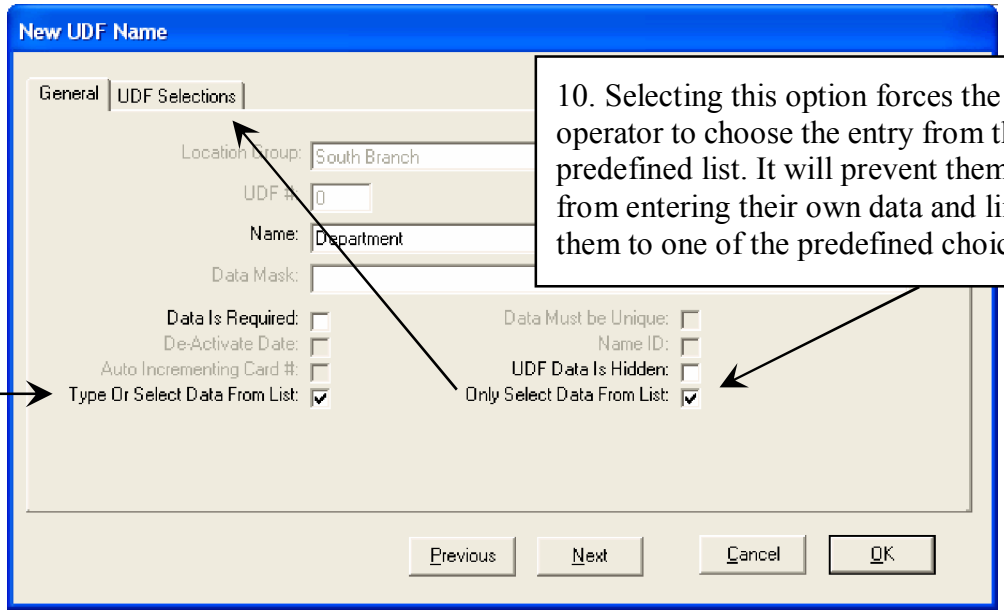
7. Click here is this UDF should be the **unique identifier** used for the card holder ASCII import utility.

8. Select this to Hide the UDF information in this field from any operator that does not have privileges to it in their password profile. This allows sensitive data to be entered without allowing every operator to see it. This works for card holder searches in both DataBase and Workstation.

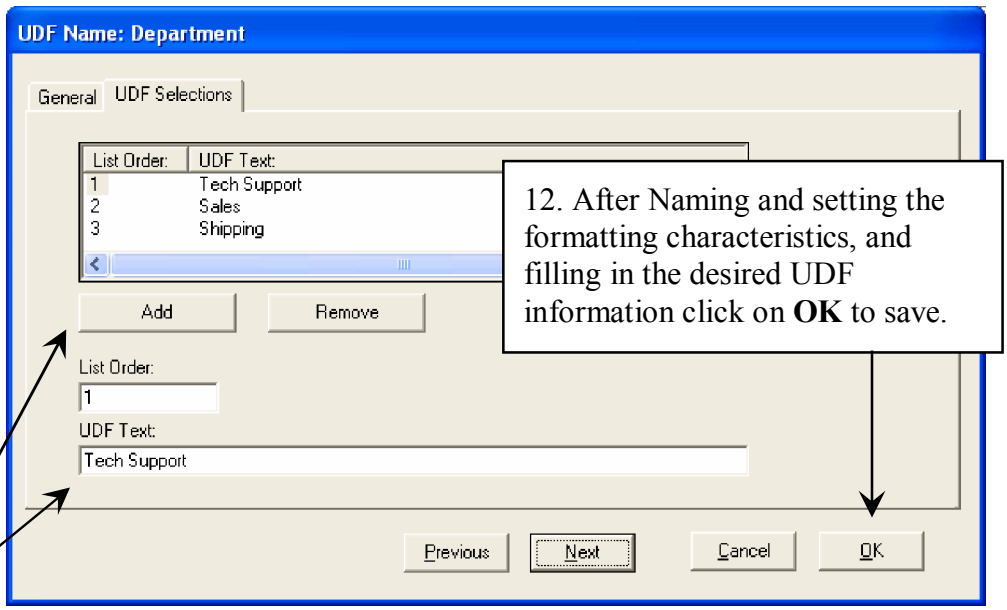
To include or exclude this from a Password Profile, edit the Password Profile in question and navigate to > All Menus > Locations > DataBase > Card Holder > Hidden UDF Data.

User Defined Fields

9. Choose this option if you would like to predefine selections for the operator to choose from. This allows data to be predefined and lets the user pick one of the selections from a drop down list. The choices and the order in which they are viewed can be predefined. Unless the "Only select data from list" option is chosen the operator will be able to enter their own information instead of picking from the predefined list. Having predefined information to choose from makes the data entry uniform and aids in the searching, sorting and reporting of cardholders based on User Defined Fields.



10. Selecting this option forces the operator to choose the entry from the predefined list. It will prevent them from entering their own data and limit them to one of the predefined choices.

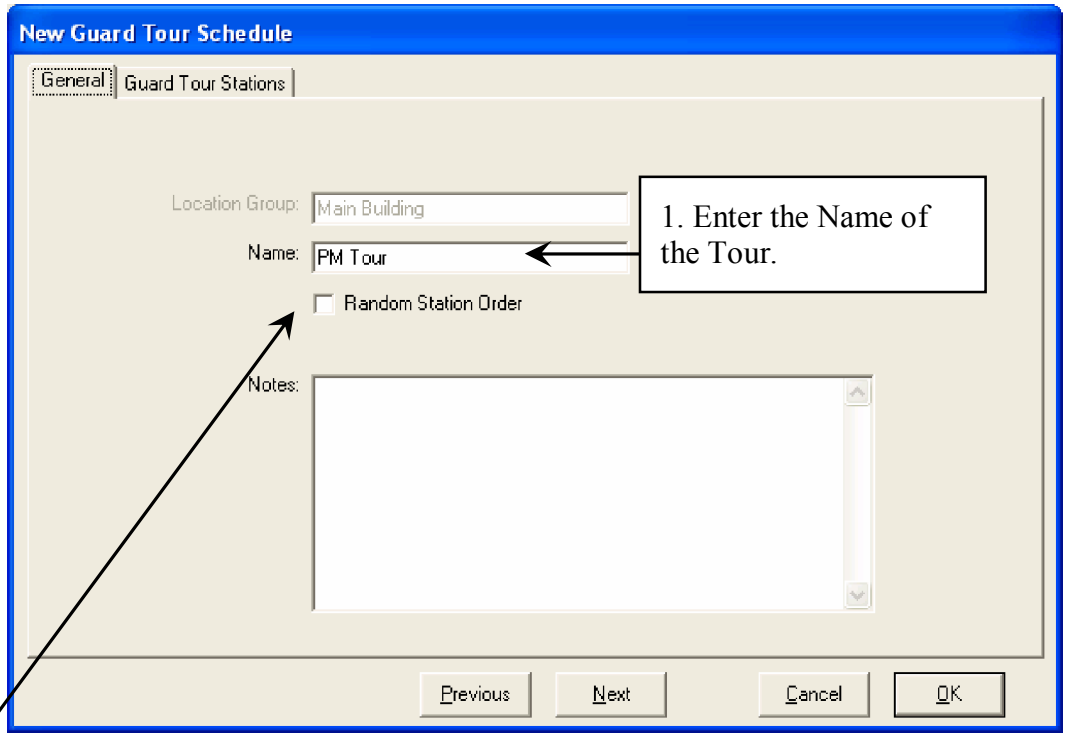


12. After Naming and setting the formatting characteristics, and filling in the desired UDF information click on **OK** to save.

11. Click on Add and then immediately Enter the text in the UDF Text field and the click OK to save or Add to enter the next selection -or- Click Add to insert as many choices as you are going to need for this UDF field. Then Click on each one in the list and Set the: List Order (top to bottom order of the selections) and Enter the Text for each one using up to 50 characters. To remove one of the UDF choices, select the entry and click on Remove.

Guard Tour

This section of the program is used to create **Guard Tours**. A guard tour is a predefined schedule of events that must take place in sequence or at random and within a specified time period. Typically a guard tour is manually initiated at the PC and a guard begins the tour by going to the 1st tour station and performing the predefined action at that station. Each checkpoint of a tour is referred to as a station. A guard tour is a series of stations with a minimum and maximum amount of time the guard has to execute a predefined function at each station. The failure to complete the entire tour in the time frame specified will cause an alarm to be generated at the PC.



1. Enter the Name of the Tour.

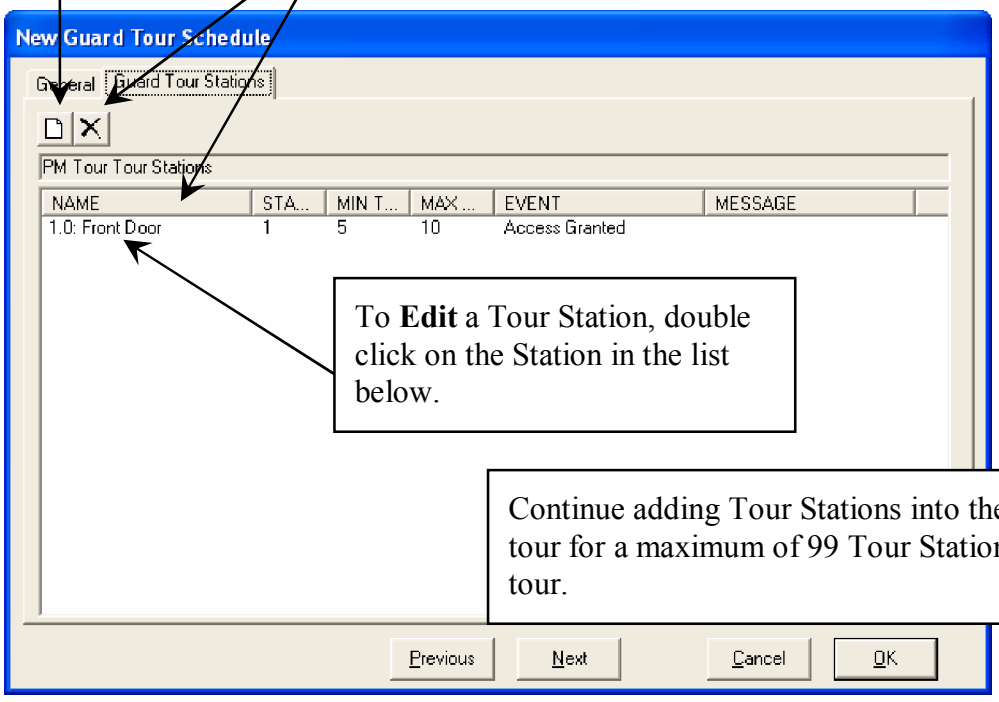
2. Select **Random Station Order** to allow the Tour to be executed in any order. When this is selected there is no regard to the Station Number that typically sets the order in which the Tour Stations must be reached. When selecting Random Station Order it is important to set the minimum and maximum Time from Start on each Station to be the same. These times would be the minimum and maximum time to complete the entire tour.

Guard Tour

This screen shows a list of all stations (checkpoints) within this tour. The Station number, minimum and maximum times, the event or action to be taken, and the message to be displayed if this station is not reached within the allotted time. Stations can be added, deleted, or modified from this screen.

4. Click on the **Add** button below to add a Station into the tour.

To **Delete** a Tour Station, Click on the Station in the list below then click on the **Delete** button.



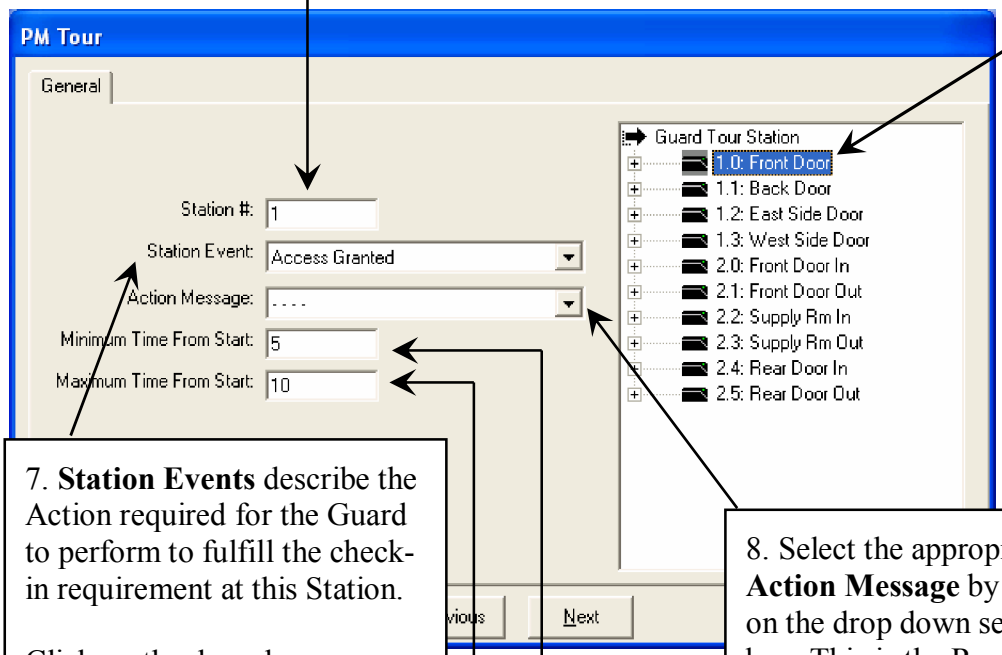
To **Edit** a Tour Station, double click on the Station in the list below.

Continue adding Tour Stations into the same tour for a maximum of 99 Tour Stations per tour.

To allow an overall minimum and maximum time for the entire tour, do not set individual times for each tour station. Instead of individual times set the Minimum and Maximum Times for each Tour Station the same and use an overall start and stop time for the completion of the entire tour. Unless Random Station Order is selected the stations must always be executed according to station number.

Guard Tour

5. The **Station Number** is a number assigned by the system according to the order in which the tour stations are defined. However the Station Number can be changed. This number signifies the order in which the tour stations must be fulfilled unless the Random Station Order (set on the General Tab) option is selected. Station 1 must be satisfied first followed by Station 2 and so on.



6. Click on the **Device** (reader) below that is to be used in this Tour Station. Double click on the Device to expand and display a list of all associated inputs to choose from if the Tour Station is to use and input (alarm) point.

7. **Station Events** describe the Action required for the Guard to perform to fulfill the check-in requirement at this Station.

Click on the drop down selection box to choose the action desired.

Each of the 99 possible Stations in a Tour can have any one of the Event Types.

8. Select the appropriate **Action Message** by clicking on the drop down selection box. This is the Response Plan displayed on the Workstation, when there has been a failure by a Guard to reach a Tour Station within the Maximum amount of time.

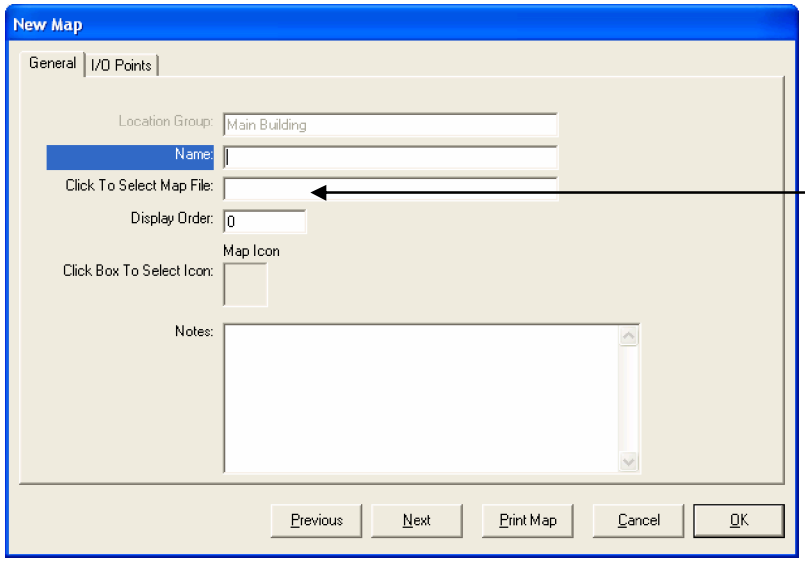
10. Enter the **Maximum** amount of time in minutes from the beginning of the Tour that the Guard will have to reach this station and perform the action required. This would be the maximum amount of time from the Start of the Tour until the Guard reaches the station being defined. If the Guard arrives late an alarm is generated indicating how late to which station and can optionally display an Action Message.

9. Enter the **Minimum** amount of time in minutes from the beginning of the Tour that the Guard will have to reach this station and perform the action required. This would be the minimum amount of time from the Start of the Tour until the Guard reaches the station being defined. If the Guard arrives early it is logged indicating how early.

Maps

Graphic Alarm Maps can be imported into the system for alarm annunciation, Input, Output, and Camera Control. Up to 21 different graphic file formats can be imported into the system. The original map being imported should be approximately 640 x 480 in size.

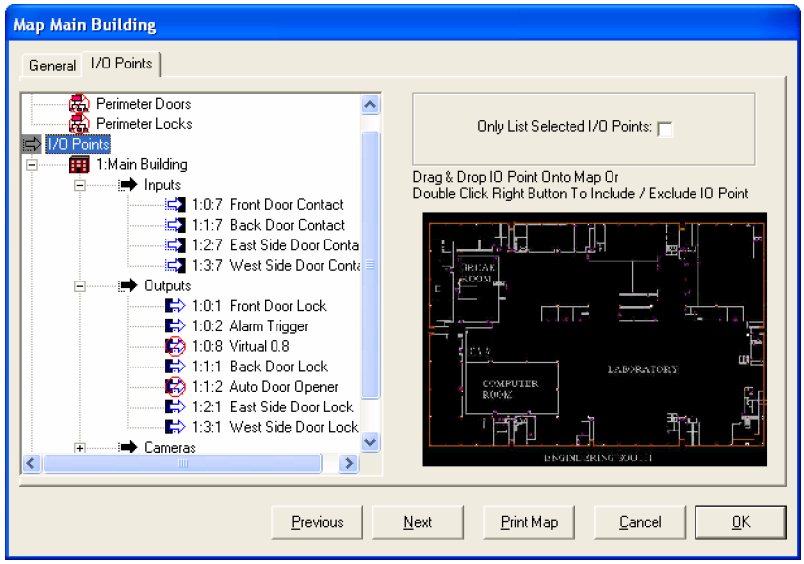
The General Tab is where the graphic alarm maps are imported into the system. The I/O Points Tab is where the desired inputs, outputs, and Cameras are placed on the Map.



While in Database with Maps selected, Click on the Add Button.

Click here to access the Windows™ File navigation dialogue box to find the graphic map you are looking for. The system automatically opens the selector to the Maps subdirectory under WinDSX.

Once the file is selected the system saves a copy as a *.JPG for the Alarm Map use.



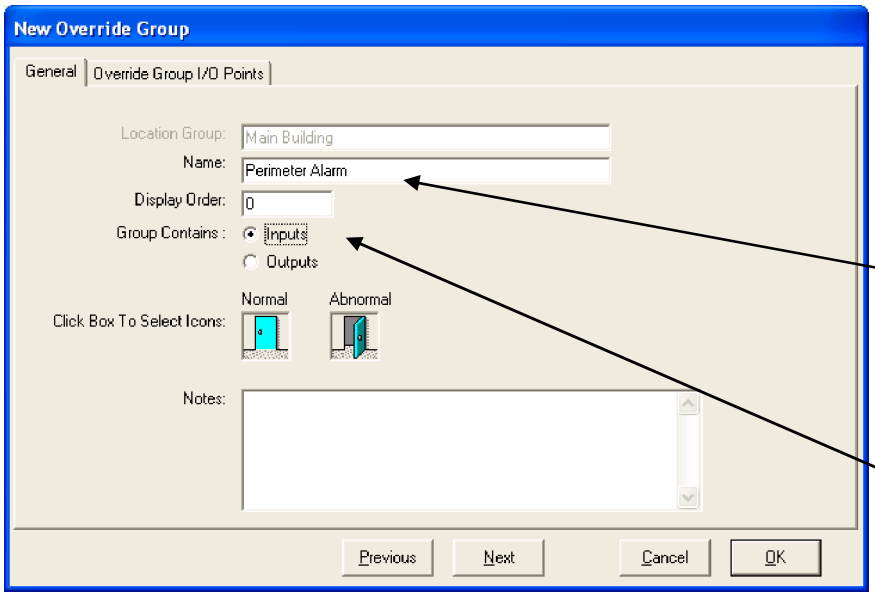
Double Click on Override Groups and I/O Points. Double Click the Location Name, then continue to Double Click to show all available inputs, outputs, and cameras that may be selected for inclusion on the map. **Placement** on the map is achieved by dragging and dropping the selected item from the list on the left onto the Map in the Window on the right. The Map then turns to full screen to allow exact positioning of the Icon. Once the Icon is placed exactly where you desire click on the Map somewhere other than the location of the Icon to return to the I/O Points Tab. The Icons that are selected for the Inputs, Outputs, and Override Groups are the same Icons that are placed on the Map.

To remove a point from a Map, select the point from the list to the left and press the space bar. This places the not symbol around the point and removes it from the map.

Override Group

Override Groups are comprised of either Inputs or Outputs. These inputs or outputs, once included in a group, are represented by a single set of Icons for the normal and abnormal state of all the points in the group and allow for single action control. The groups can be expanded for individual control and status.

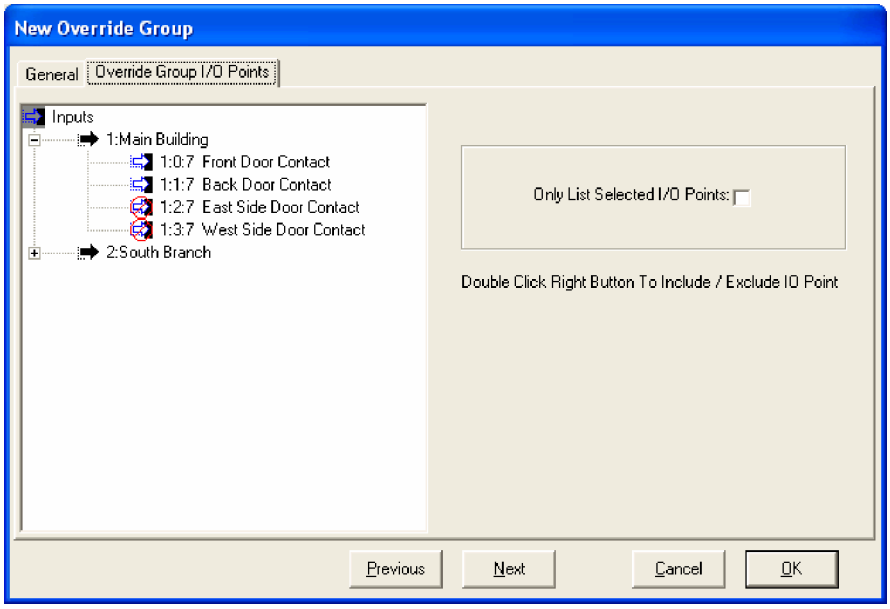
Besides the summary status the Icons provide with multiple Inputs or Outputs, there is also the ability to control the inputs armed state and the outputs on/off state through a single action. The Override Groups are a menu item in the Selection Window located in the Workstation program. Override Groups can also be defined on Graphic Alarm Maps for status and control.



While in Database with Override Group selected, click on the Add Button.

Enter up to 30 characters that best describes the Override Group and its function or purpose.

Select whether the group contains Inputs or Outputs.



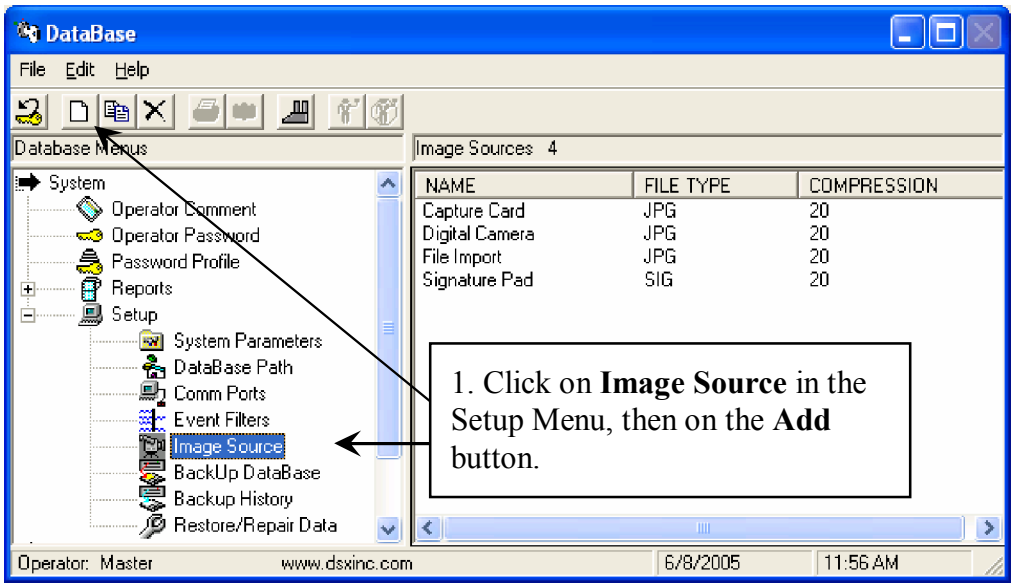
Click on the Override Group I/O Points Tab.

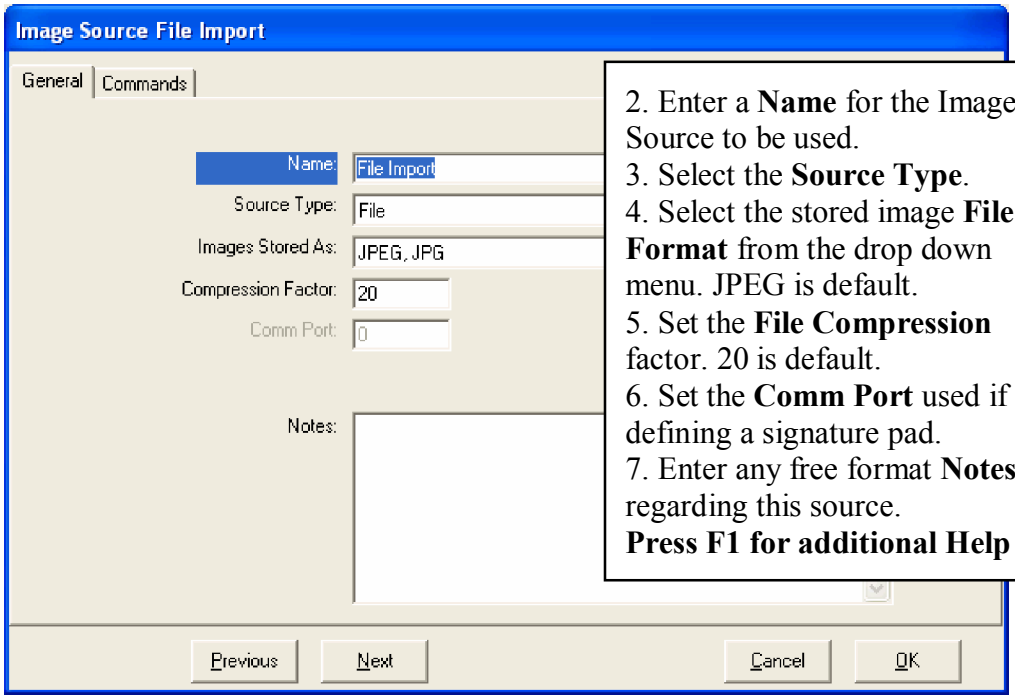
Then Double click and expand the Location and Inputs or Outputs to display all of the points defined.

Select the points to be included in this group. Double click the right mouse button or press the space bar to Include or Exclude Point.

Image Source

The **Image Source** is the location where the camera or other video device is defined for use with the Photo ID Badging portion of this program. The available Image Sources are File Import, Video, Twain, and Signature. Also set here is the File Format that the image will be stored in. JPG is the suggested format.

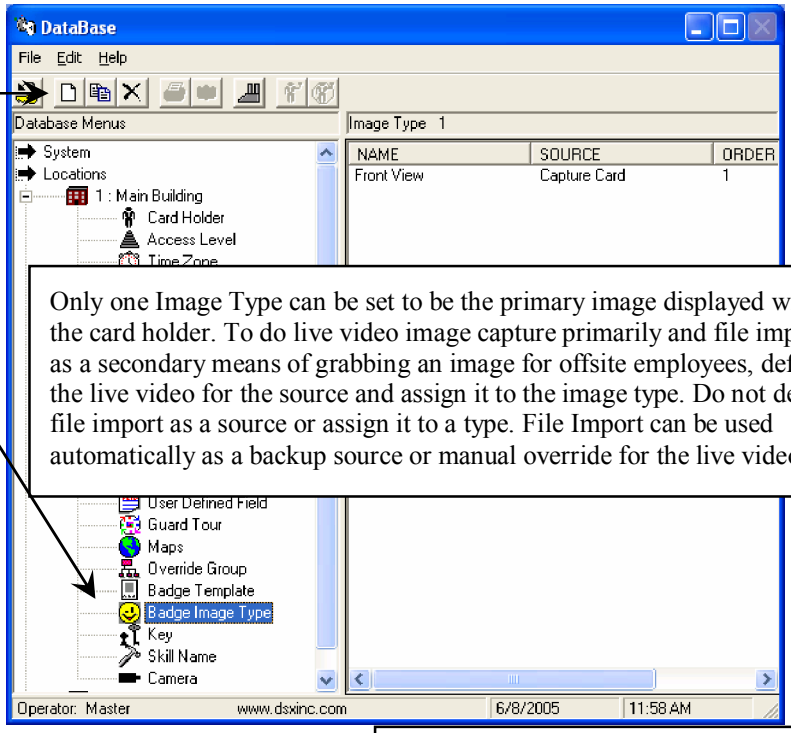




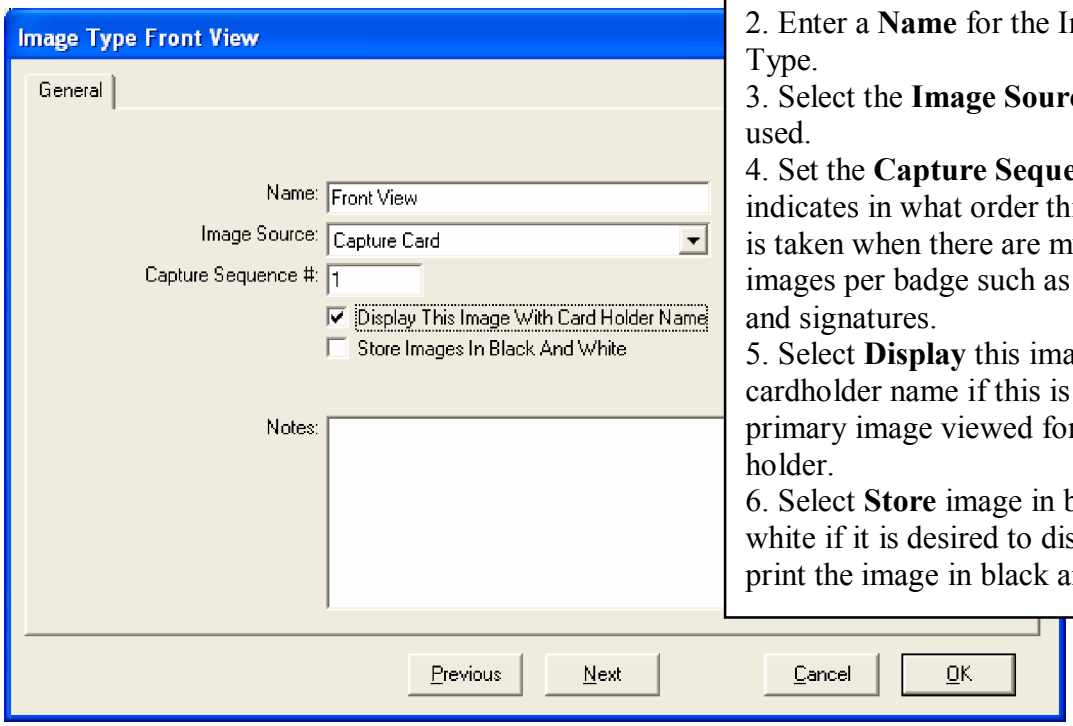
Badge Image Type

Badge Image Types are the connecting factor between the Image Source and the Badge Template. The Image Type identifies an Image Source and determines the order in which the Image is to be taken in the event there are multiple images on the badge template. The Image Type also determines which image is the primary image to be displayed with the Card Holder for searches and Image retrieval.

1. Click on **Badge Image Type,** then on the **Add** button.



Only one Image Type can be set to be the primary image displayed with the card holder. To do live video image capture primarily and file import as a secondary means of grabbing an image for offsite employees, define the live video for the source and assign it to the image type. Do not define file import as a source or assign it to a type. File Import can be used automatically as a backup source or manual override for the live video.

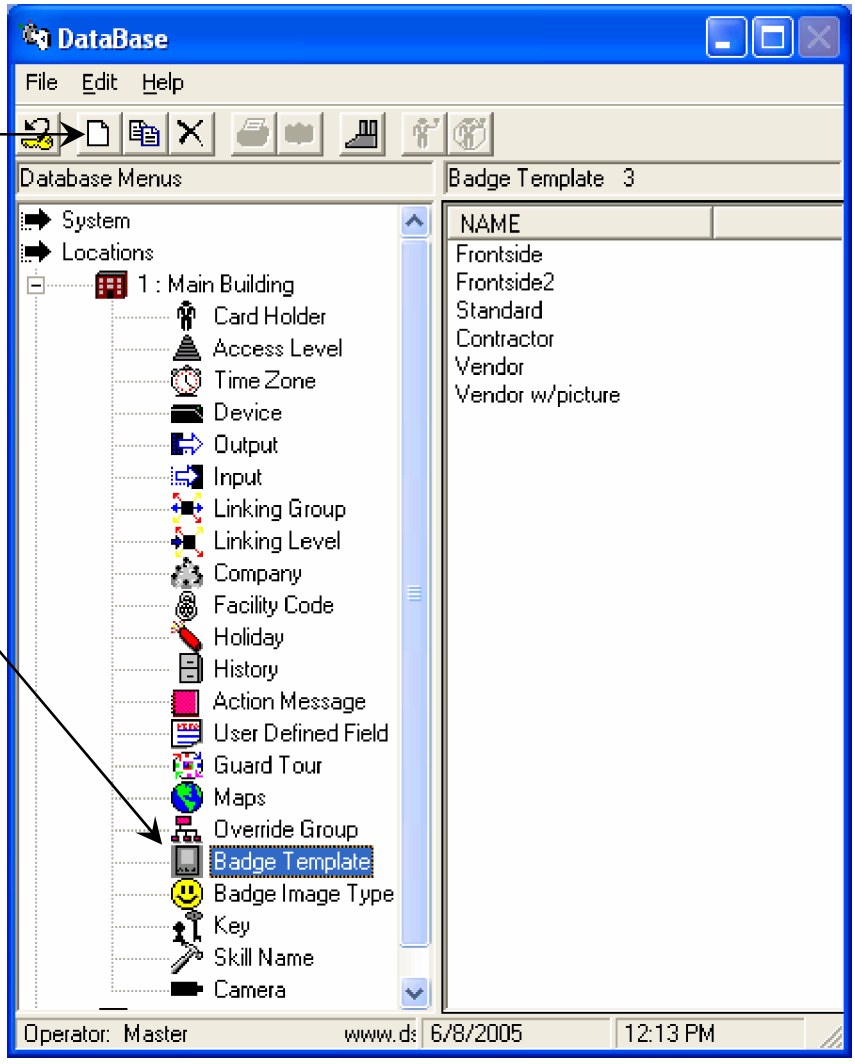


2. Enter a **Name** for the Image Type.
3. Select the **Image Source** to be used.
4. Set the **Capture Sequence** that indicates in what order this image is taken when there are multiple images per badge such as photos and signatures.
5. Select **Display** this image with cardholder name if this is to be the primary image viewed for this card holder.
6. Select **Store** image in black and white if it is desired to display and print the image in black and white.

Badge Templates

Badge Templates are the predefined badge layouts. The templates contain information regarding size, bar code, magnetic stripe encoding, and 2 sided options. The Badge Templates can be assigned to a company for automatic selection of the appropriate badge background for the Card Holder being added into the system.

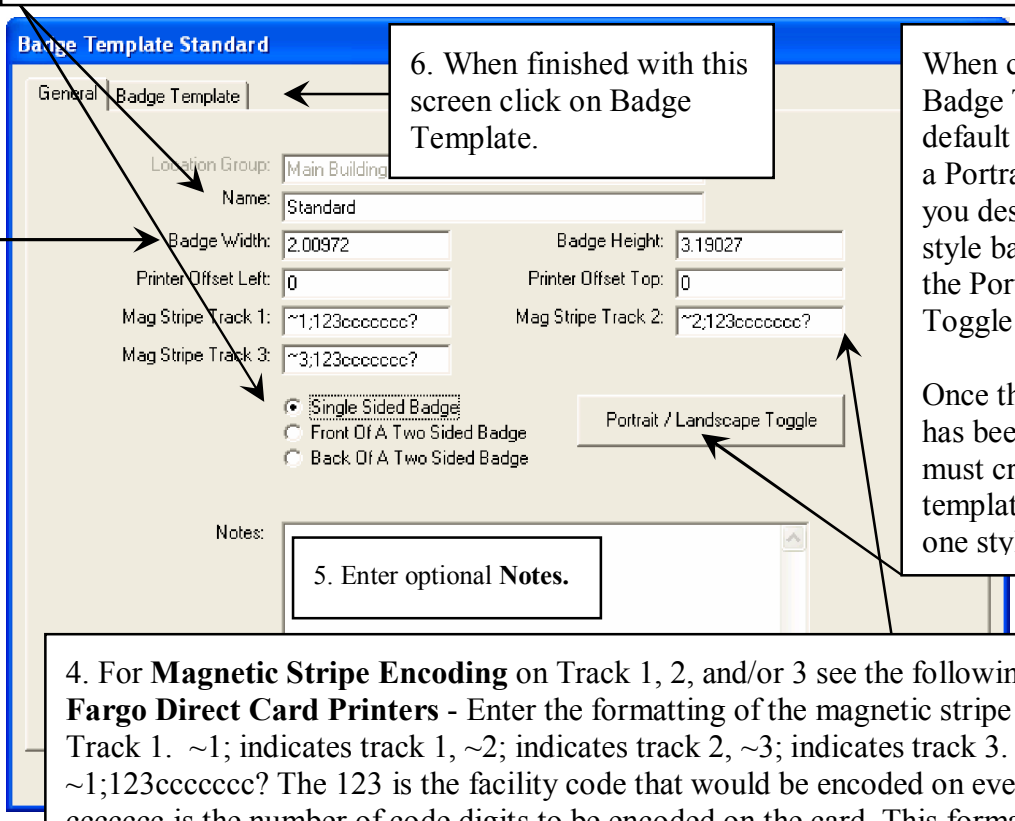
1. Click on **Badge Template,** then on the **Add** button.



Badge Templates

Enter the general information here such as size and then click on the **Badge Template** Tab to place the fields and images on the card template.

2. Enter a **Name** for the Badge Template. Templates that are the backside of a two-sided badge must have the same name with the number 2 appended to the end. For example: if the front side were named ACS the backside would be named ACS2. The single sided, front side or back side of a two sided badge option must be set appropriately on the General Tab.



6. When finished with this screen click on Badge Template.

When creating a new Badge Template the default dimensions are for a Portrait Style Badge. If you desire a Landscape style badge click here on the Portrait/Landscape Toggle Button.

Once the Badge Template has been fully created you must create a new badge template to switch from one style to the other.

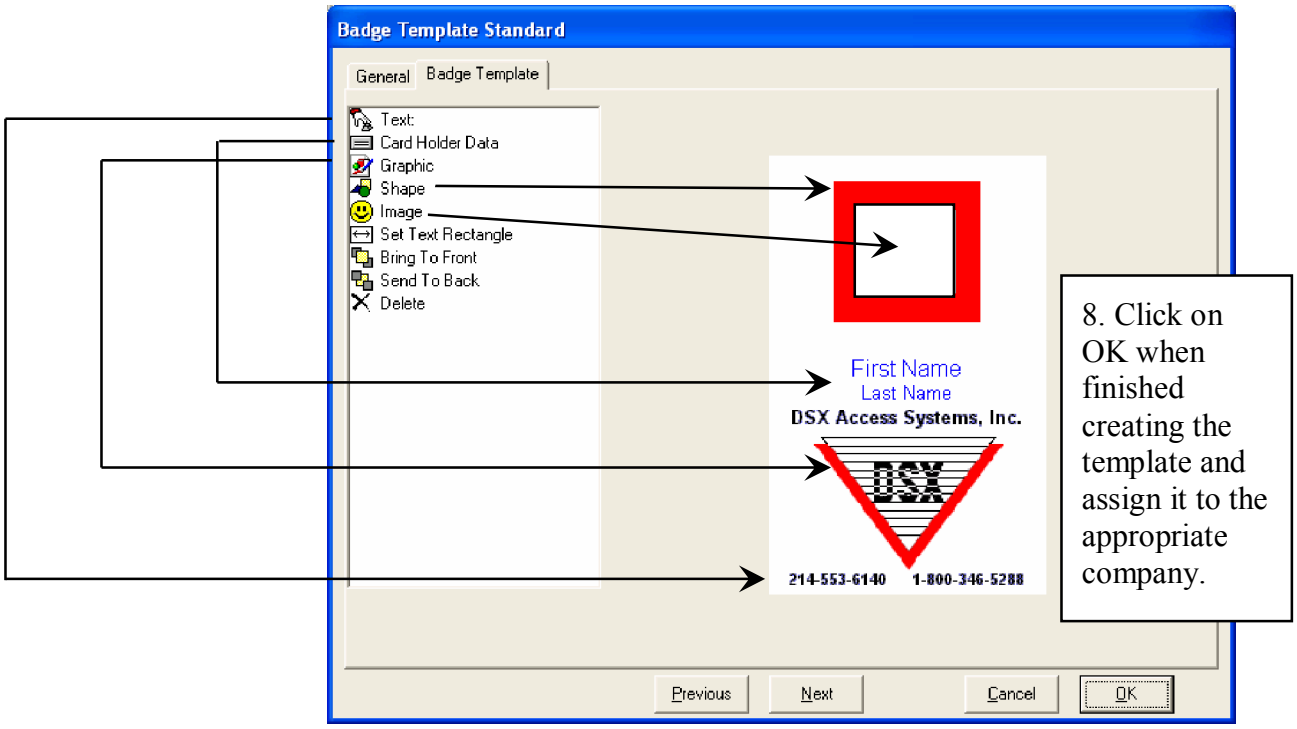
5. Enter optional **Notes.**

4. For **Magnetic Stripe Encoding** on Track 1, 2, and/or 3 see the following.
Fargo Direct Card Printers - Enter the formatting of the magnetic stripe encoding for Track 1. ~1; indicates track 1, ~2; indicates track 2, ~3; indicates track 3. For Example: ~1;123ccccccc? The 123 is the facility code that would be encoded on every card. The ccccccc is the number of code digits to be encoded on the card. This format would use Device Type A5 which is set for a 3 digit facility code and a seven digit card number in a clock and data format on track 1.
Eltron Direct Card Printers - Enter the formatting of the magnetic stripe encoding for Track 1. _ represents a space. ~C0&B_1_ indicates track 1, ~C0&B_2_ indicates track 2, ~C0&B_3_ indicates track 3. For Example: ~C0&B_1_123ccccccc would be used for 3 digit facility code of 123 and a seven digit card number.

3. Enter a **Badge Width and Height** to set the size and orientation of the badge. The sizes shown are the proper sizes for all DSX direct print cards with the exception of the adhesive backed PVC cards that are adhered to standard proximity cards. Reverse these values in the width and height fields to change from a portrait oriented badge to a landscape badge. The proper size for adhesive backed laminates used to adhere to standard proximity cards is Width – 2.075 and Height – 3.327. Badges can be up to 4".

Badge Templates

By default the badge is set for portrait style and can be altered to landscape by simply switching the values in the badge width and height fields located on the General Tab.



8. Click on OK when finished creating the template and assign it to the appropriate company.

7. To **Add,** select an item from the list on the left and drag it onto the assembly area on the right. Do this by selecting an item with the mouse, click and hold the left mouse button and drag it onto the badge canvass on the right to the desired position and release the left mouse button. When released a formatting screen will appear that allows specific characteristics to be set such as X/Y position, color, font, size, and barcode.

To **Edit** a text field, data field, graphic, image, or shape that has been placed on the badge simply click on it once with the right mouse button and the format screen will appear.

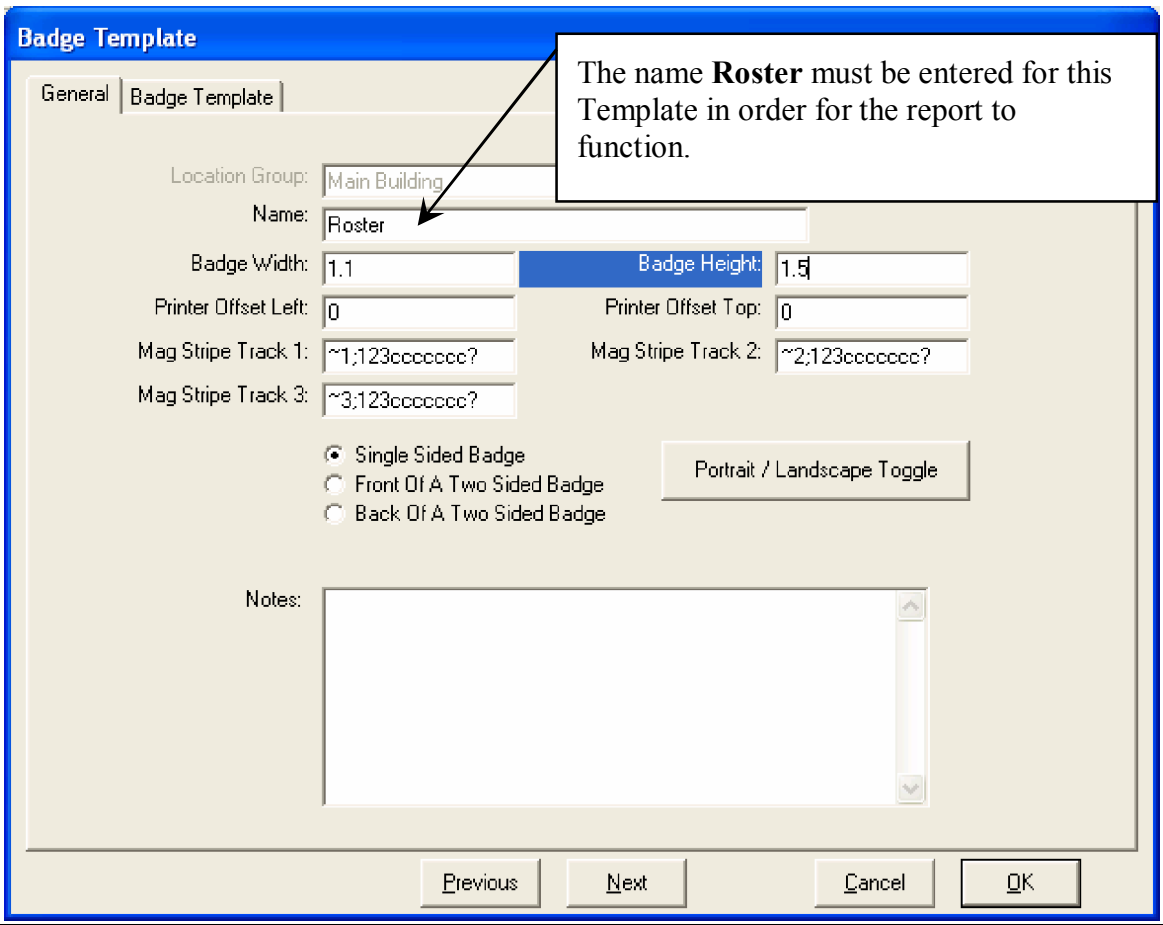
Send to Back and Bring to Front allows items to be layered on the badge. If there are several graphics and/or images on the layout, Send to Back allows you to select which one will be on top. There may be an instance where you will want a Card Holder Image sitting on top of a Graphic like a colored box or logo. Place both images on the layout and click on one of the two and select Send to Back or Bring to Front to set the images in their proper place.

Badge Templates – Roster

In order to correctly use the Print Roster option located under System / Reports / Card Holder Report, a **Badge Template named Roster** must first be defined. The size of this Template will determine how many Images and how much information about each Card Holder will fit onto a given page. Since printer drivers differ among different manufacturers, experimentation may be necessary to achieve the output desired. The following screens are only meant as examples of a Roster Template that include the Card Holder's picture and First / Last Name.

*****Note*****

Once the Roster Template's Width and Height have been entered and items have been placed on the Template layout, the Width and Height cannot be changed. If a different size is desired, the Roster Template must be deleted, and a new one created.

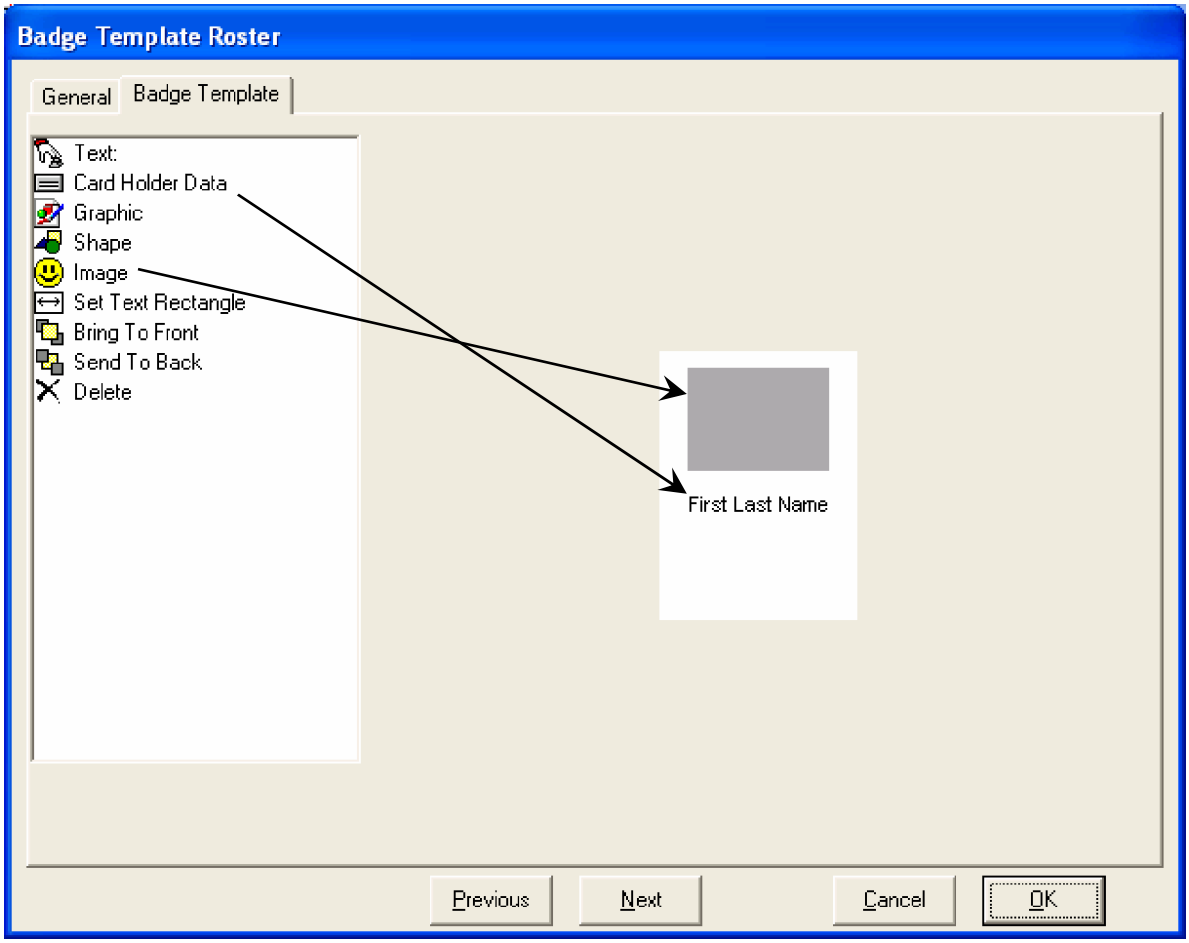


Badge Width and Height will need to adjusted to determine how many Card Holders, along with their added information, will be printed to a single page. A large Template layout may only print one Card Holder per page, while a smaller layout may print 48 or more per page.

To adjust size, either delete the entire Template and start again, or delete items on the Badge Template screen, then adjust Width and Height as needed on the General screen.

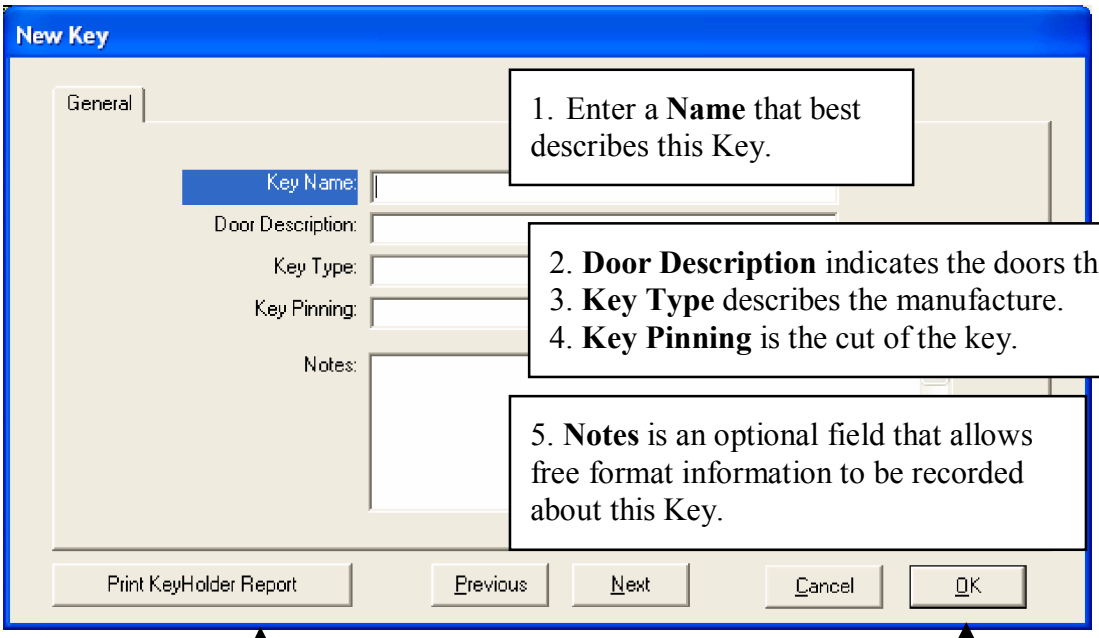
Badge Templates - Roster

In this example, the Card Holder's Image and First / Last Name have been added to the 1.1 x 1.5 Template. The more information added to a given template, the more space it will occupy on a printed page.



Keys / Skill Name

Keys provide the ability to create a database that catalogs each key in the location. This is referring to conventional metal keys used to unlock doors. Each Key has a name, doors description, key type, pinning, and notes field. These Keys once defined here are assigned to the card holders to record who has keys to which doors.



1. Enter a **Name** that best describes this Key.

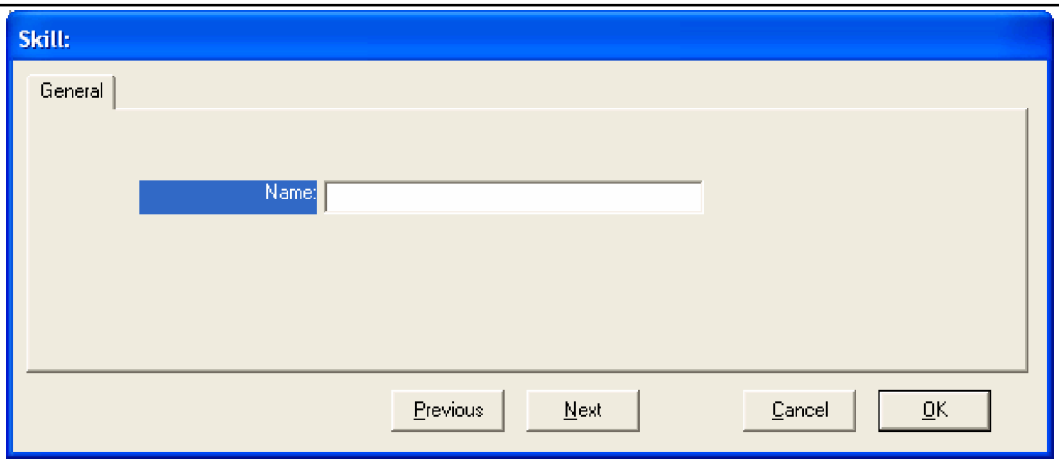
2. **Door Description** indicates the doors this key is to.
3. **Key Type** describes the manufacture.
4. **Key Pinning** is the cut of the key.

5. **Notes** is an optional field that allows free format information to be recorded about this Key.

Click here for a **KeyHolder Report.** This will print a list of everyone that has possession of the specified key.

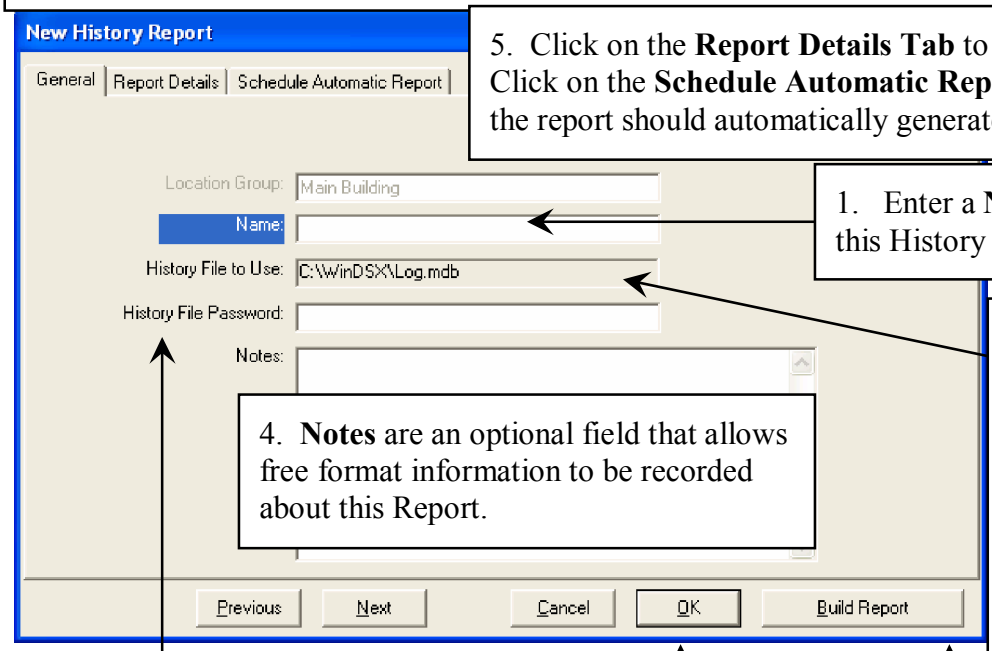
6. After Naming, and entering the data for this key click on **OK.**

Skills are used to identify particular trades or professions of the Card Holders at this location and provide another criteria to search on. Once Skills have been defined, close and restart the Database program and advance to the Card Holder Search engine and you will notice there are now 4 tabs instead of 3 with the far right hand tab being the search Skills tab.



History / General

History allows the user to view and print the event logs currently stored on the shared resource or hard disk or in any History.mdb database. The history report may include all events for a location or be very specific about what is included in the report. This is accomplished by answering a series of questions on what is to be included in the report.
Begin the report by clicking on the word History in the list of items underneath your location name, then click on Add in the toolbar at the top of the Database screen.



5. Click on the **Report Details Tab** to set the report definition. Click on the **Schedule Automatic Report Tab** to set the times the report should automatically generate.

1. Enter a **Name** that best describes this History Report. Up to 20 Char.

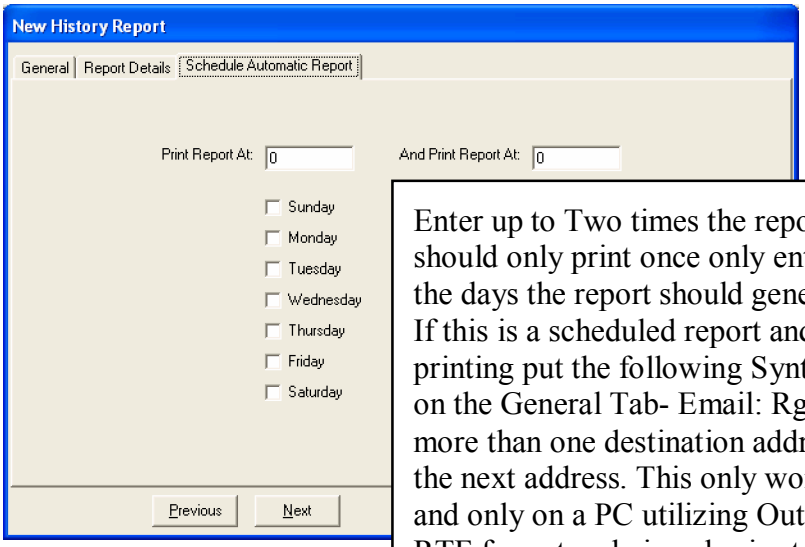
2. This is the path to the shared history files. The **path** shown is the typical default. Other file names and paths can be specified to allow reports to come from an archived history file, or from history that is being recorded on a Network File Server.

4. **Notes** are an optional field that allows free format information to be recorded about this Report.

3. If this is archived history that was encrypted with a password enter the password here.

Click on **OK** to save the report configuration.

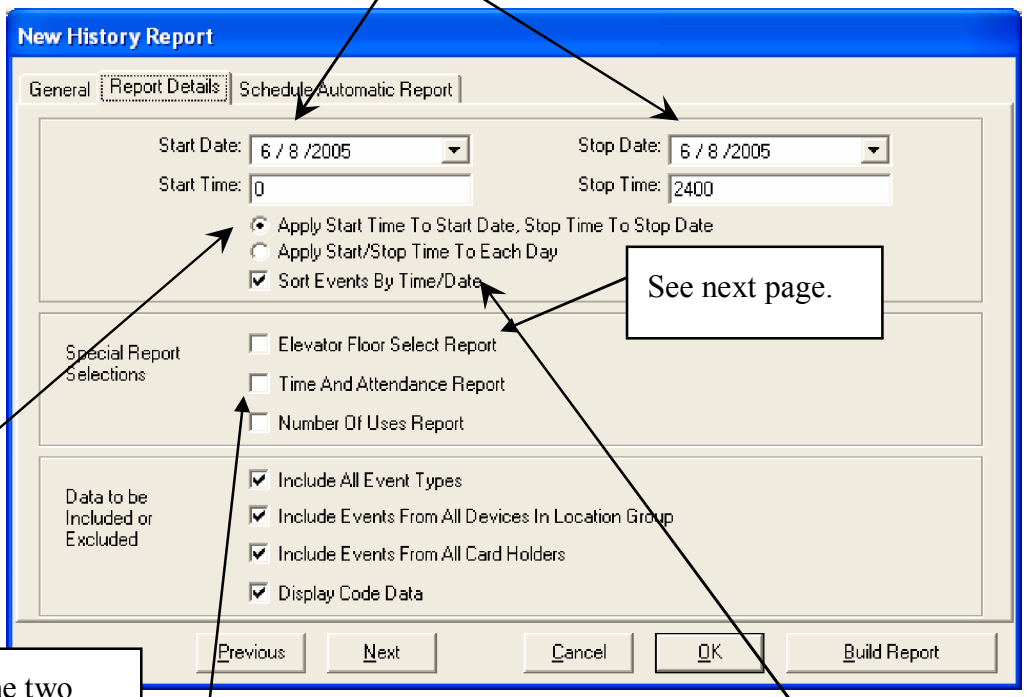
Click on **Build Report** when the configuration is complete and the report is ready to run.



Enter up to Two times the report should print in the same day. If it should only print once only enter a time in the top left field. Click on the days the report should generate at the times designated above.
If this is a scheduled report and you desire it to be Emailed instead of printing put the following Syntax in the beginning of the Notes field on the General Tab- Email: Rgibson@DSXINC.COM - if there were more than one destination address place a semi-colon then a space and the next address. This only works with scheduled (automatic) reports and only on a PC utilizing Outlook Express™. The report is saved in RTF format and zipped prior to being emailed.

History / Report Details

6. Enter the **Start Date** and **Start Time** that the History Report is to begin. Enter the **Stop Date** and **Stop Time** the History Report is to end. Use the small up/down arrows to increment and decrement the segments within the date fields. Use the large down arrow to access the calendar menu.



See next page.

7. Click on one of the two ways to apply the start and stop times and dates. Use either:

Apply **Start Time to Start Date and Stop Time to Stop Date.** The report will encompass all time between the start and stop dates and times.

Apply the **Start and Stop Time to Each Day** of the period from the Start Date to the Stop Date. For Example with this selected the report is run from the start time to stop time on each of the days between the start date and the stop date.

8. Select this to have the system **Sort the History by Time and Date** for the report. If this is not selected the events are reported in the manner in which they were received at the PC designated as the Comm Server.

9. Select this field to instruct the system to configure for a **Time and Attendance Report**. Select this for Time and Attendance only, it does not have to be selected for any other report.

Complete the series of 4 questions that are remaining before clicking on **Build Report. See page 80**.

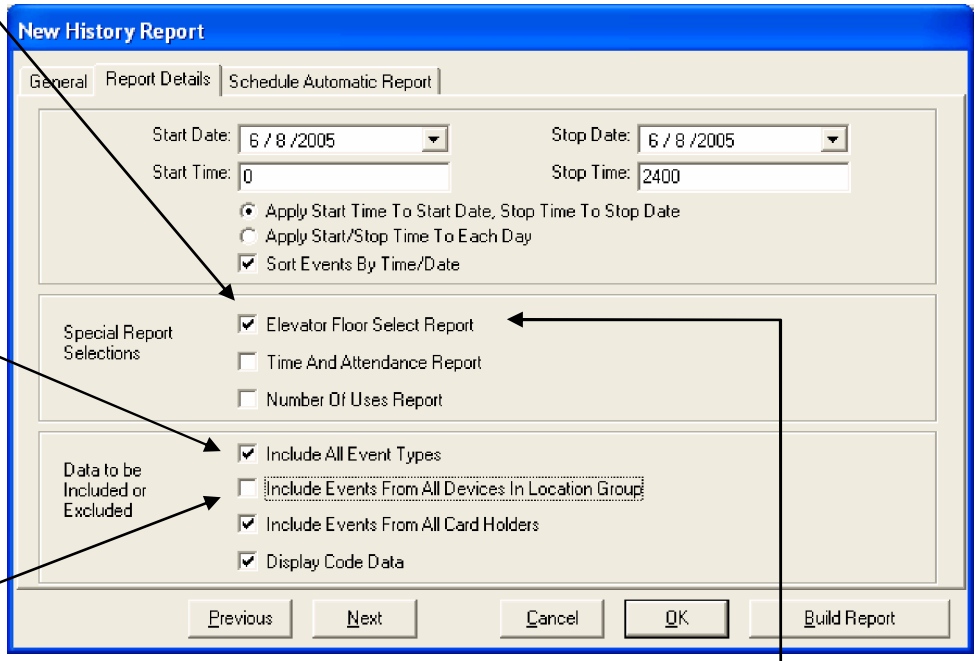
Faster History Searches can be achieved by selecting specific card holders and specific events. Leaving either *All Card Holders* or *All Events* checked will not use the fast search.

History / Elevator Floor Select

Select this box for **Elevator Floor Selection History**.

Leave this and all other boxes at their default. Not needed for the Elevator Report.

Uncheck this box to define what floors are to be tracked. See text below and page 82.



By selecting this report you are asking for a list of floor select activity and the associated access granted. Include all event types can be unchecked and other events selected if desired.

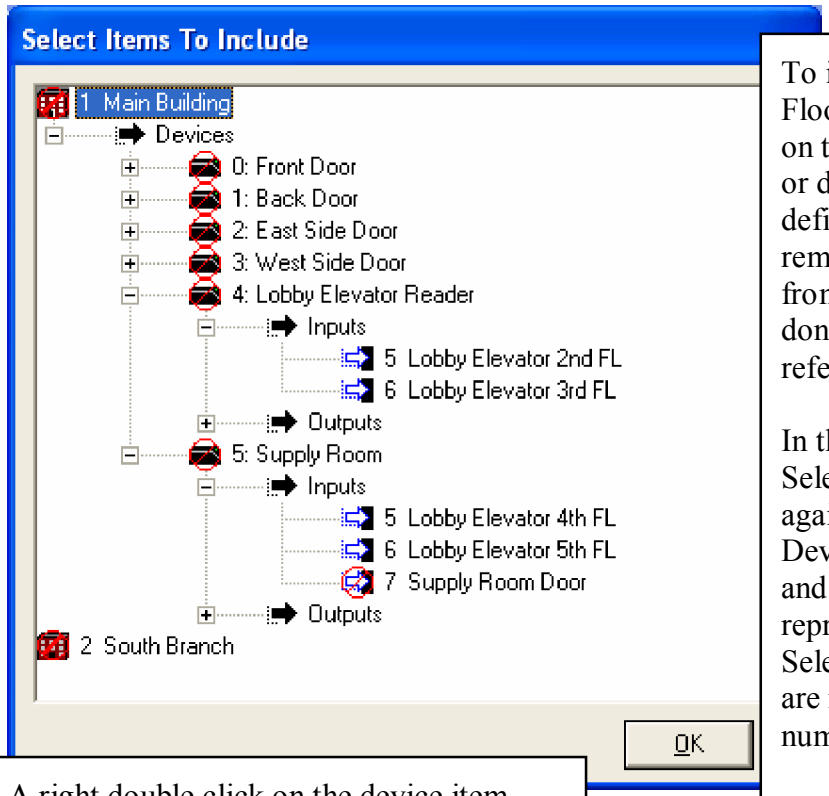
If you want a report to include all access to the third floor you would select each of the devices (readers in cabs) and the third floor inputs associated with each one.

If you want a report to include all access in a particular cab then you would select the device (reader in a cab) and all of the floor select inputs associated with that device.

To configure the system for this report the floor select inputs have to be associated with the Device (reader) that is in the same elevator cab. This allows for Elevator Floor Select Reports to be run from History that show the card holders access and the floor they selected.

Also required for Floor Select Elevator reporting is the following: Under the Input Options Tab- "Show status change message at PC" must be enabled (checked). On the Input General Tab-the Name needs to reflect the Cab and the Floor select button this input is connected. For example Cab 1 Floor 3.

History / Elevator Floor Select

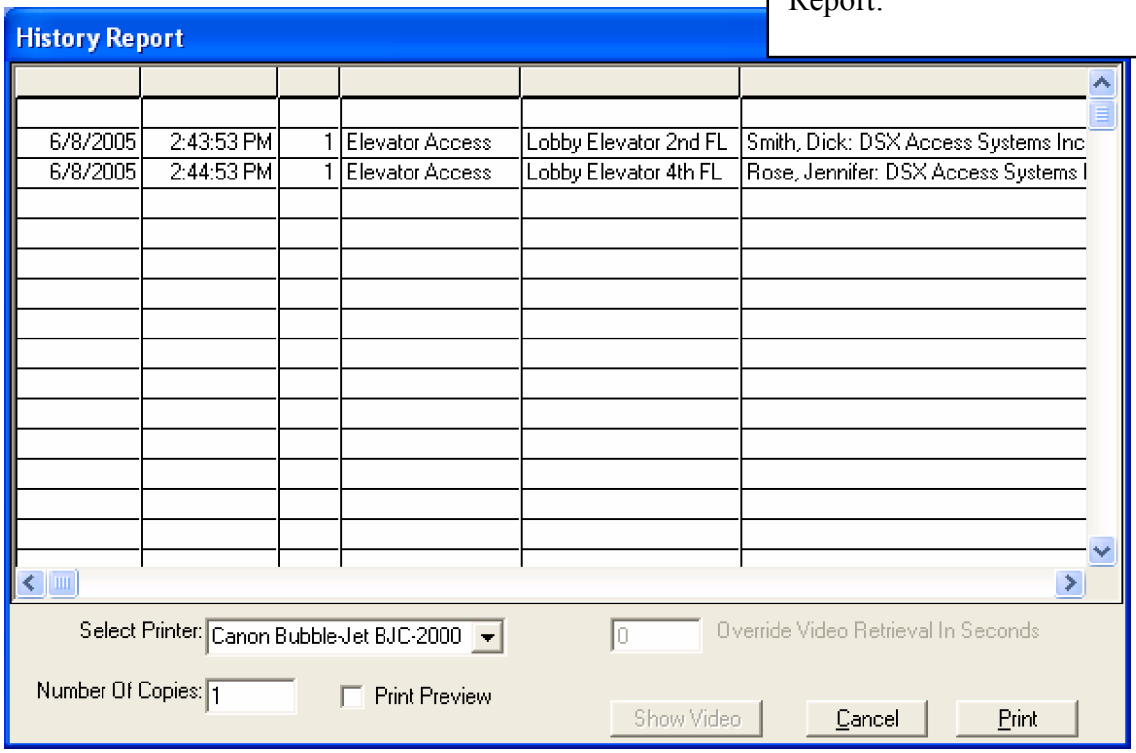


A right double click on the device item will select/de-select all items below it.

To include inputs in the Elevator Floor Select Report, either click on the input and hit the space bar, or double right click on the input definition. Either action should remove the red "Not" symbol from the item. This must also be done for the Device and Location references.

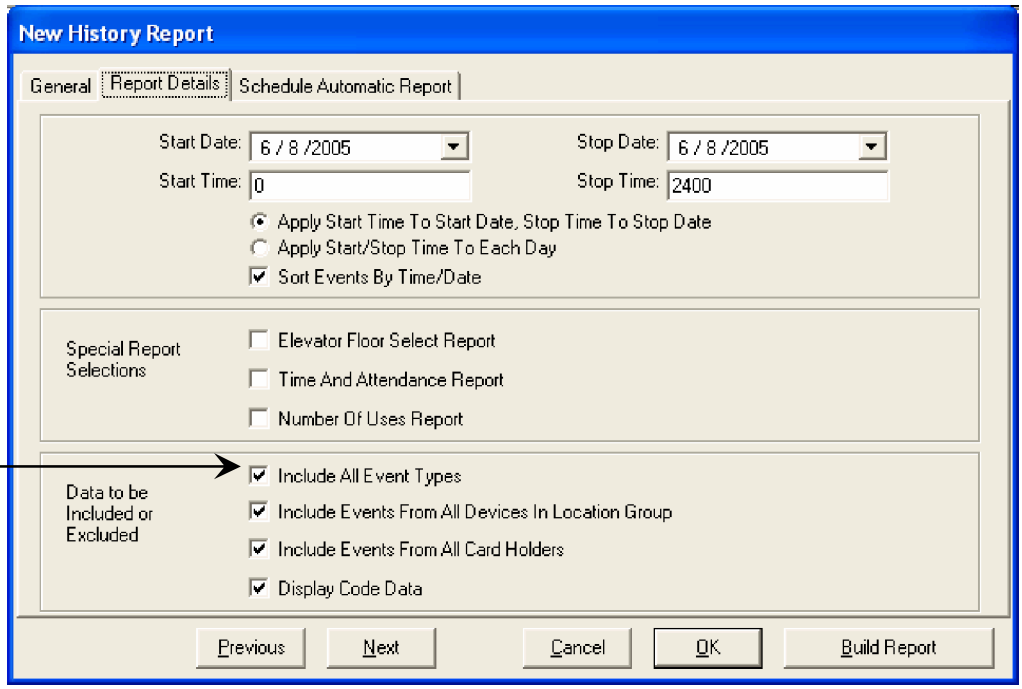
In this example, Elevator Floor Selection History will be run against the Main Office Location, Device number 7, Lobby Elevator, and Inputs 5 and 6, which represent the 2nd and 3rd Floor Selections. The 4th and 5th floors are monitored by inputs on device number 5.

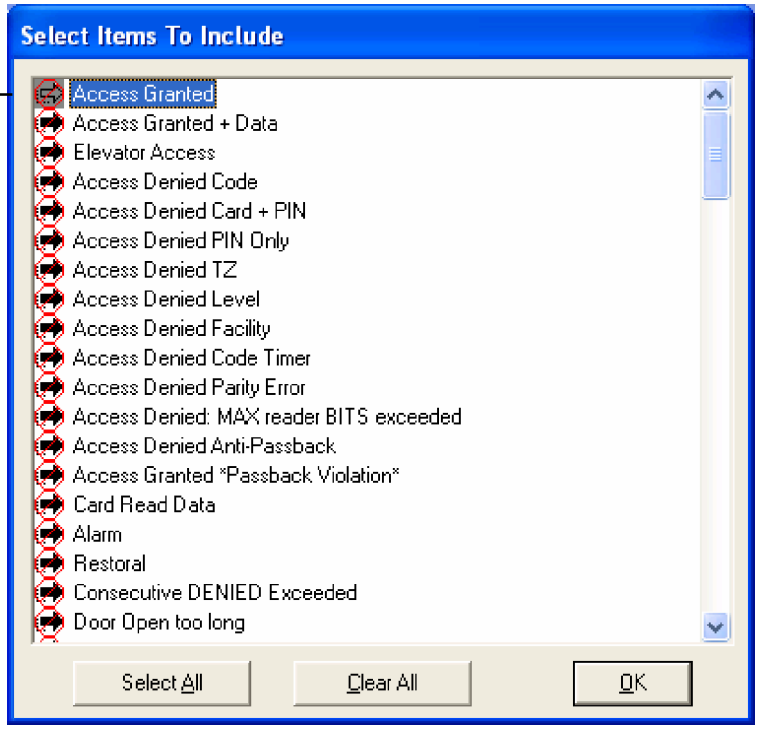
When selections are completed, click OK. Then click on Build Report.



History / All Events

The default report includes **All Events** at **All Readers**, from **All Card Holders** and displays their **Code Data.** To be more selective with the report, remove the checkmark from one or all of the selections to receive a breakdown of that selection.



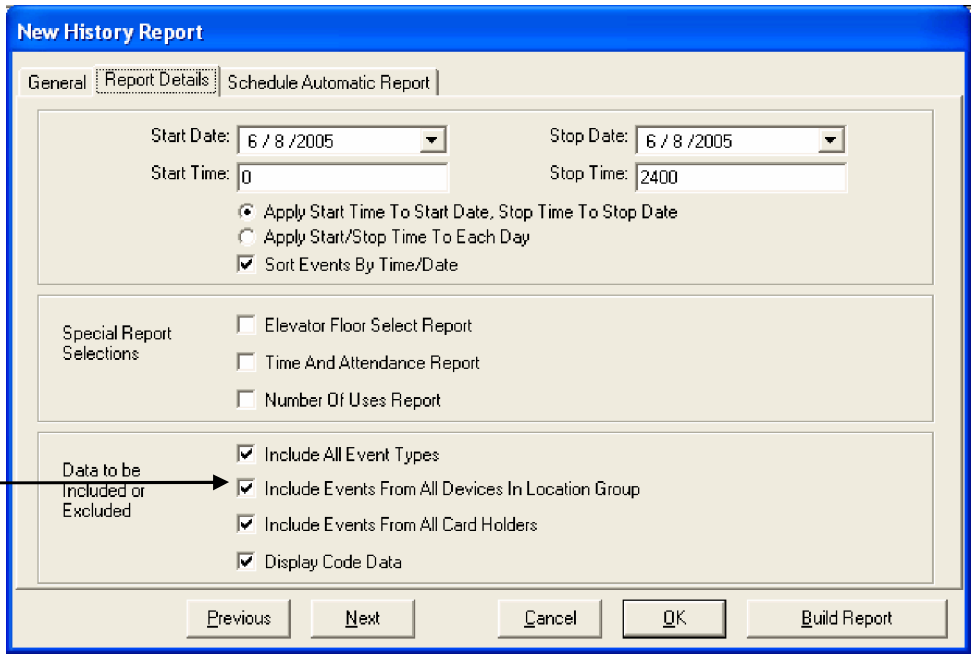


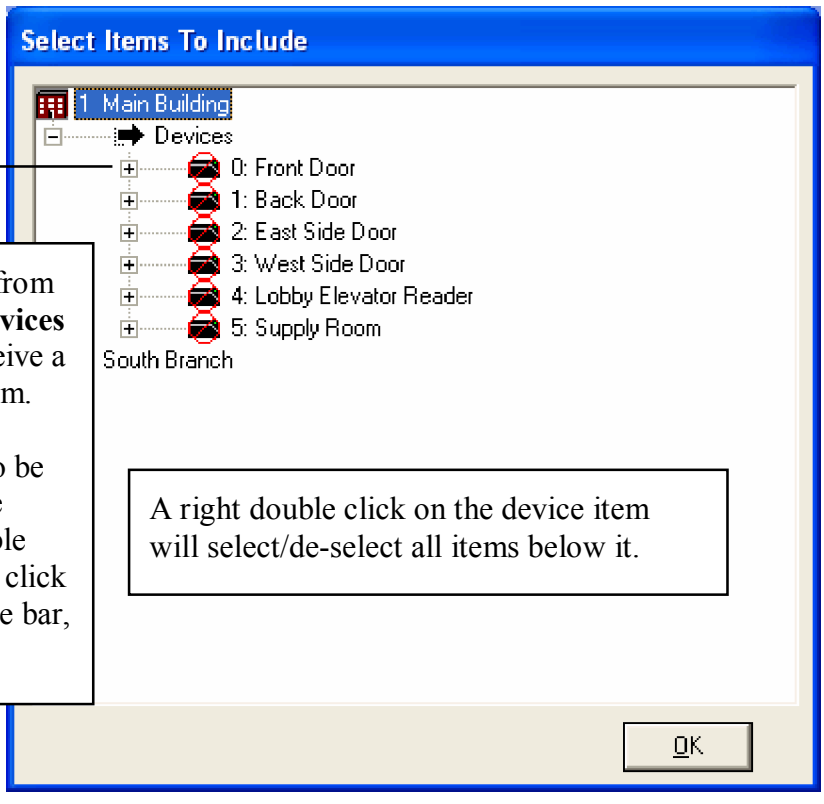
10. Remove the checkmark from **Include All Events** by clicking on it once to receive a list of all event types in the system.

To select an event to be included either Double right click on it or click on it once and press the space bar, then click on **OK.**

History / All Devices (readers)

The default report includes **All Events** at **All Readers**, from **All Card Holders** and displays their **Code Data.** To be more selective with the report, remove the checkmark from one or all of the selections to receive a breakdown of that selection.





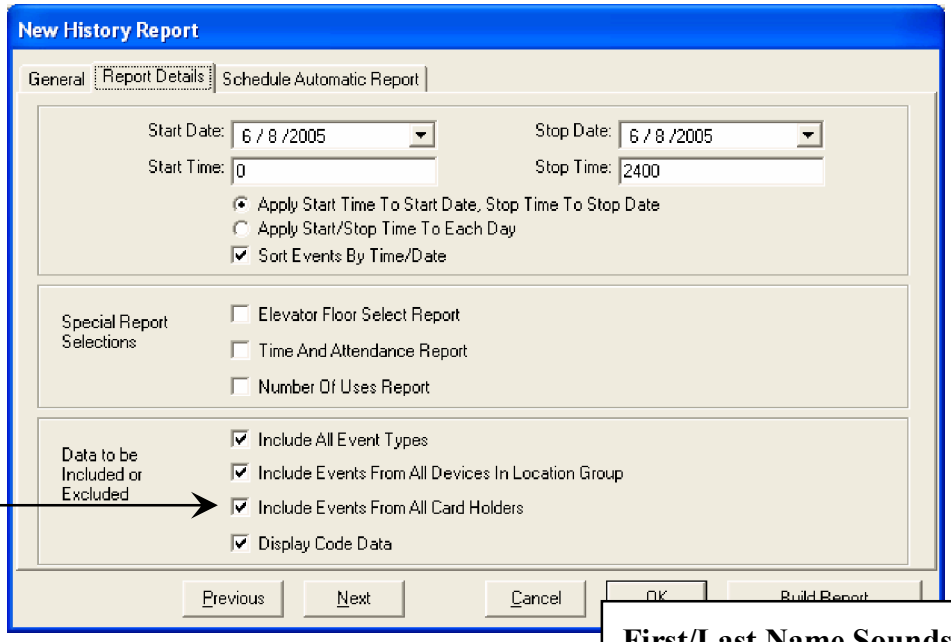
11. Remove the checkmark from **Include Events from all Devices** by clicking on it once to receive a list of all readers in the system.

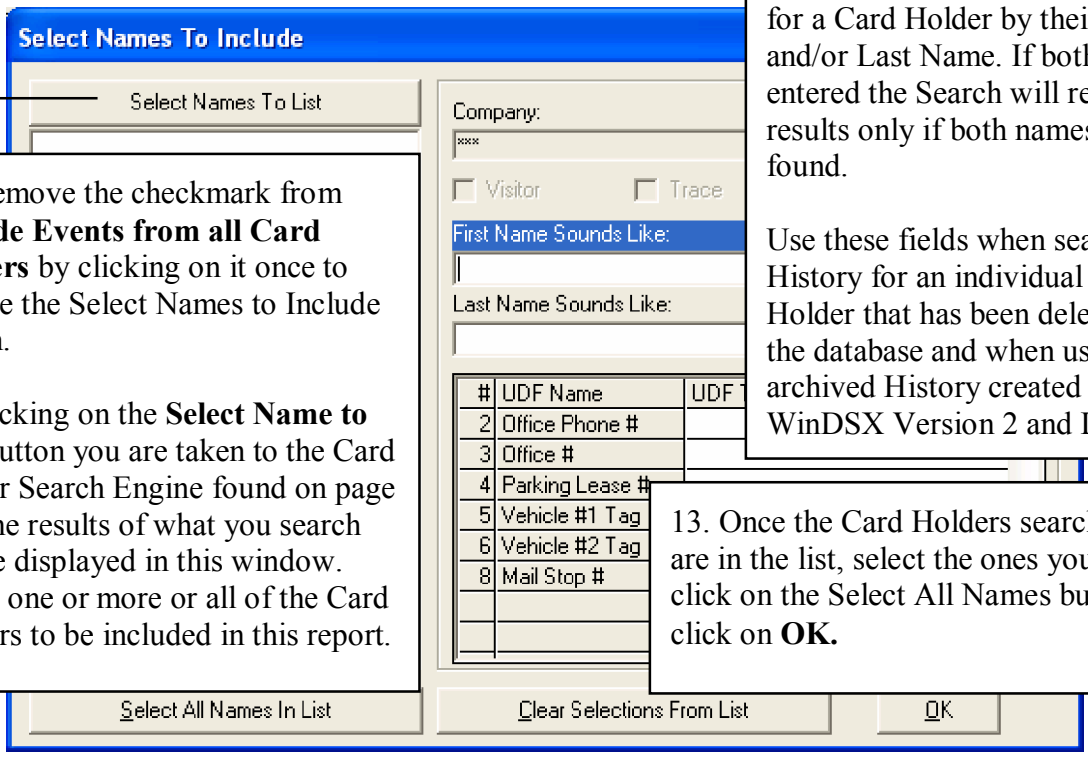
To select a device (reader) to be included Double click on the location name and then double right click on each device or click on it once and press the space bar, then click on **OK.**

A right double click on the device item will select/de-select all items below it.

History / All Card Holders

The default report includes **All Events** at **All Readers**, from **All Card Holders** and displays their **Code Data.** To be more selective with the report, remove the checkmark from one or all of the selections to receive a breakdown of that selection.





First/Last Name Sounds Like: Enter a name here to search history for a Card Holder by their First and/or Last Name. If both are entered the Search will return results only if both names are found.

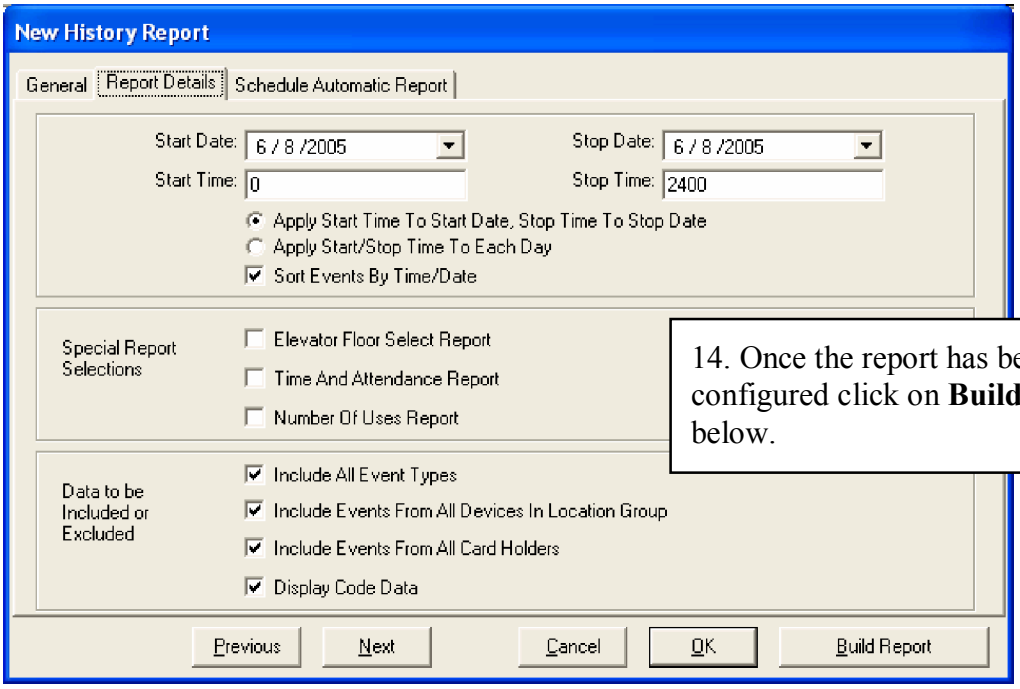
Use these fields when searching History for an individual Card Holder that has been deleted from the database and when using archived History created with WinDSX Version 2 and Lower.

12. Remove the checkmark from **Include Events from all Card Holders** by clicking on it once to receive the Select Names to Include screen.

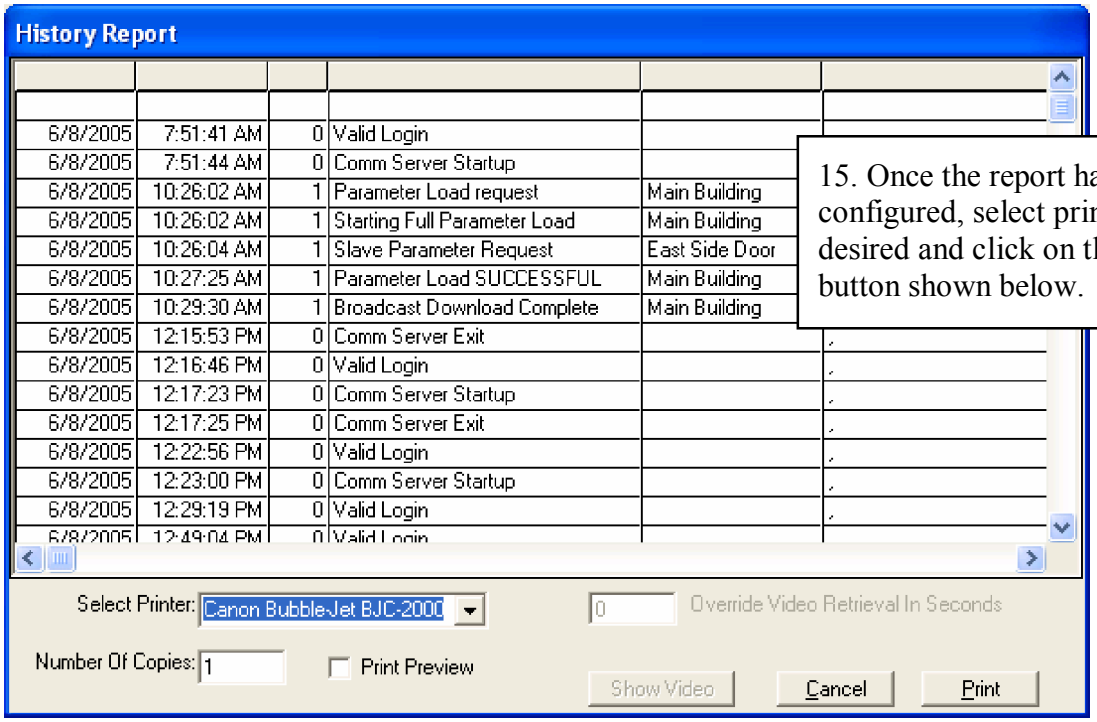
By clicking on the **Select Name to List** button you are taken to the Card Holder Search Engine found on page 35. The results of what you search for are displayed in this window. Select one or more or all of the Card Holders to be included in this report.

13. Once the Card Holders searched for are in the list, select the ones you want or click on the Select All Names button and click on **OK.**

History / Print PreView



14. Once the report has been configured click on **Build Report** below.



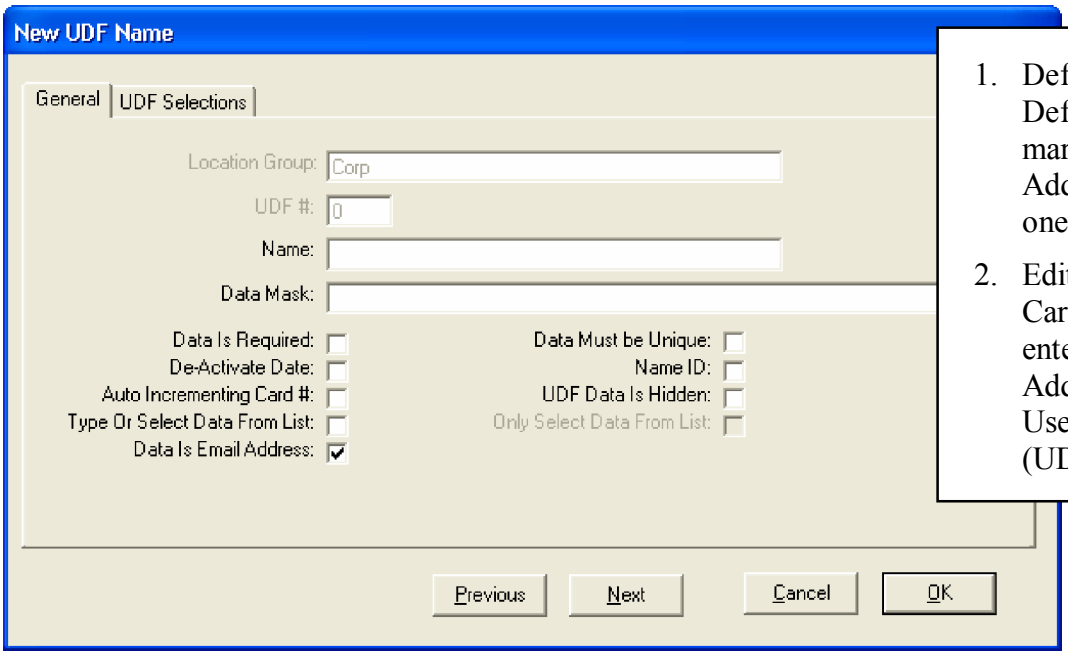
15. Once the report has been configured, select print preview if desired and click on the **Print** button shown below.

Digital Video Recorder – Video Retrieval - Alternately, from this screen you may click on an alarm event. Then you can modify the pre and post alarm video playback time in the Override Video Retrieval In Seconds box. The default amount of stored video that should be retrieved is preset under the Camera/DVR setup for each camera. (One half of the time entered is for pre-Alarm and one half is post-Alarm.) Then click on Show Video to display associated video for this alarm.

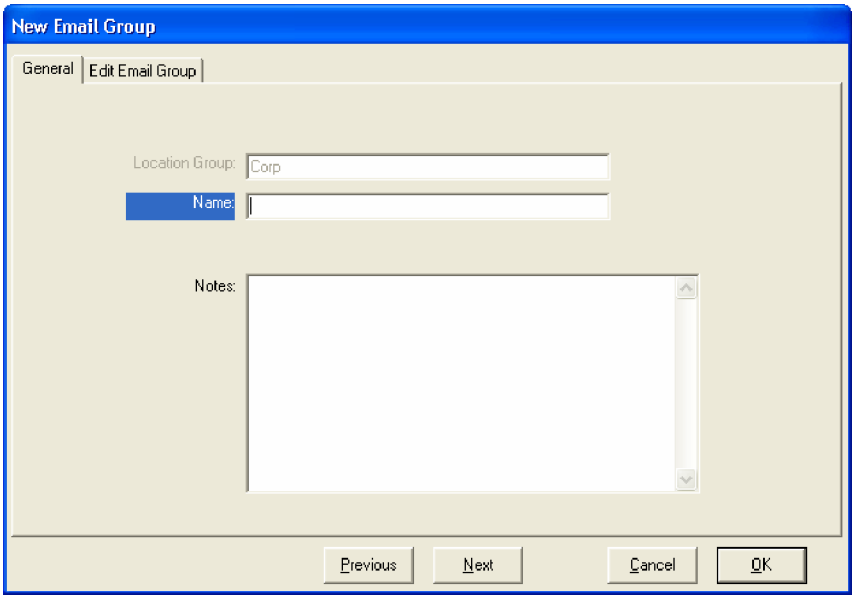
Email Notification / Setup

Email Groups are groups of people that will be sent an email due to a Location, Device, or Input Alarm. Email Groups consist of a single or multiple Card Holders that each have a time zone assigned. The Time Zone selected for each Card Holder determines when that person will receive the email notification for the alarm to which the email group is assigned.

Card Holders that are to receive an Email Notification must have an Email Address in a UDF field that is configured as an Email Address. Email Groups can be assigned to a location, to each device and to each input desired. Those that have an Email Group assigned will send an Email upon Alarm. For More information about Alarm Email Notification press F1 within the software.



1. Define a User Defined Field and mark it as an Email Address such as the one to the left.
2. Edit at least one Card Holder and enter an Email Address under their User Defined Fields (UDFs).

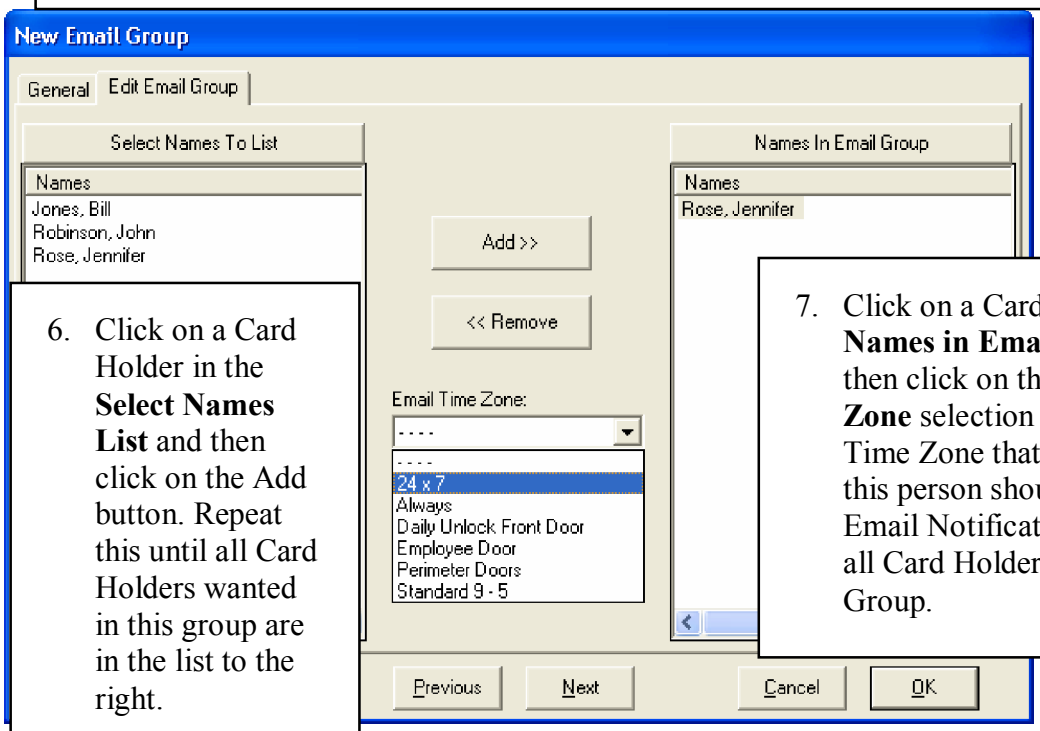


3. Add an Email Group and give it a name. The name represents who will receive the Emails or possibly what is generating them.
4. Click on the Edit Email Group tab to configure the group.

Continued on the next page...

Email Groups / Assignment

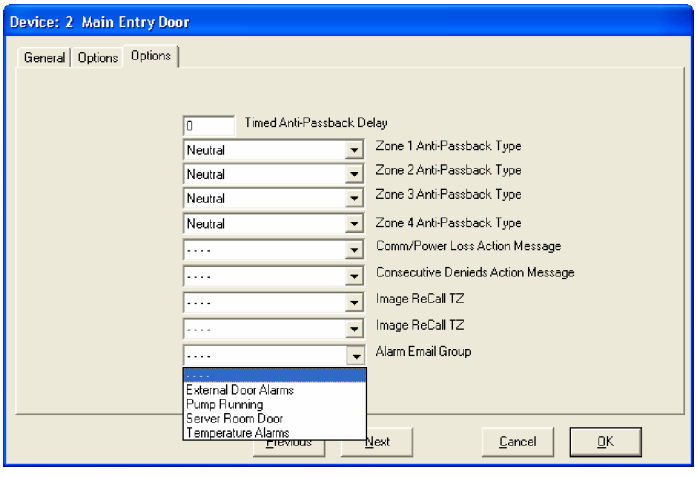
5. Click on the **Select Names to List** button below to bring up the Card Holder Search Engine. Enter the criteria or make the selections to return the desired list of card holders.

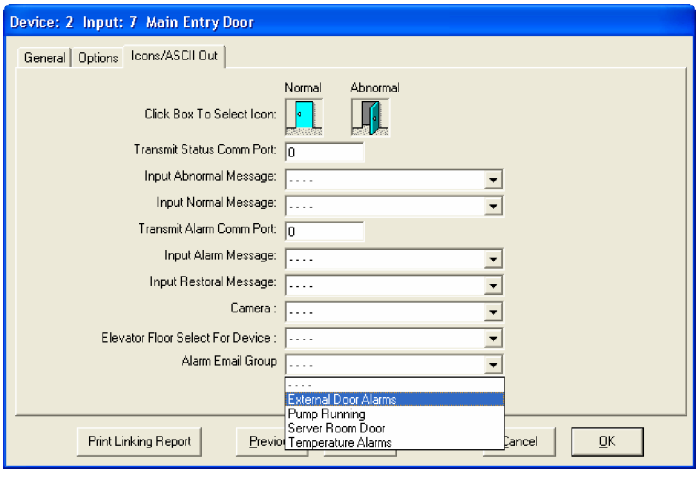


6. Click on a Card Holder in the **Select Names List** and then click on the Add button. Repeat this until all Card Holders wanted in this group are in the list to the right.

7. Click on a Card Holder in the **Names in Email Group** list and then click on the **Email Time Zone** selection box and select the Time Zone that represents when this person should receive the Email Notification. Repeat this for all Card Holders in this Email Group.

8. Edit the Location (not shown) and select the Numeric Options Tab and at the bottom select the Email Group to receive Location alarms from this location. (Location communication Loss and Restoral)
9. Edit each Device and select the second Options Tab and at the bottom select the Email Group to receive Device alarms from this Device. (All controller power supervision signals, Device communication Loss and Restoral, and Consecutive Denied Exceeded)
10. Edit each Input to utilize Email Notification and select the Icons/Ascii Out Tab and at the bottom select the Email Group to receive Input Alarms from this Input. (Input Alarms and Restorals including Door Open too Long and Troubles)

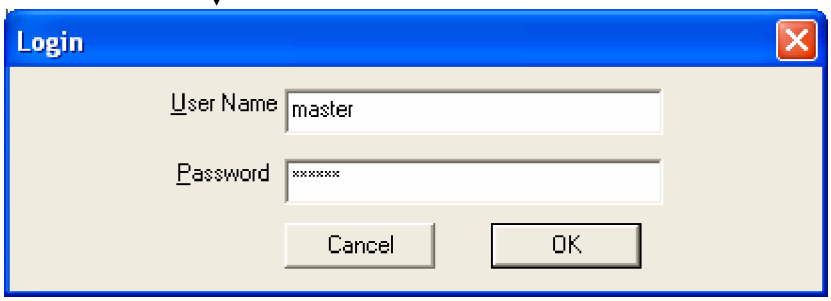




Login

Double Click on the **Workstation ICON** to start the program.

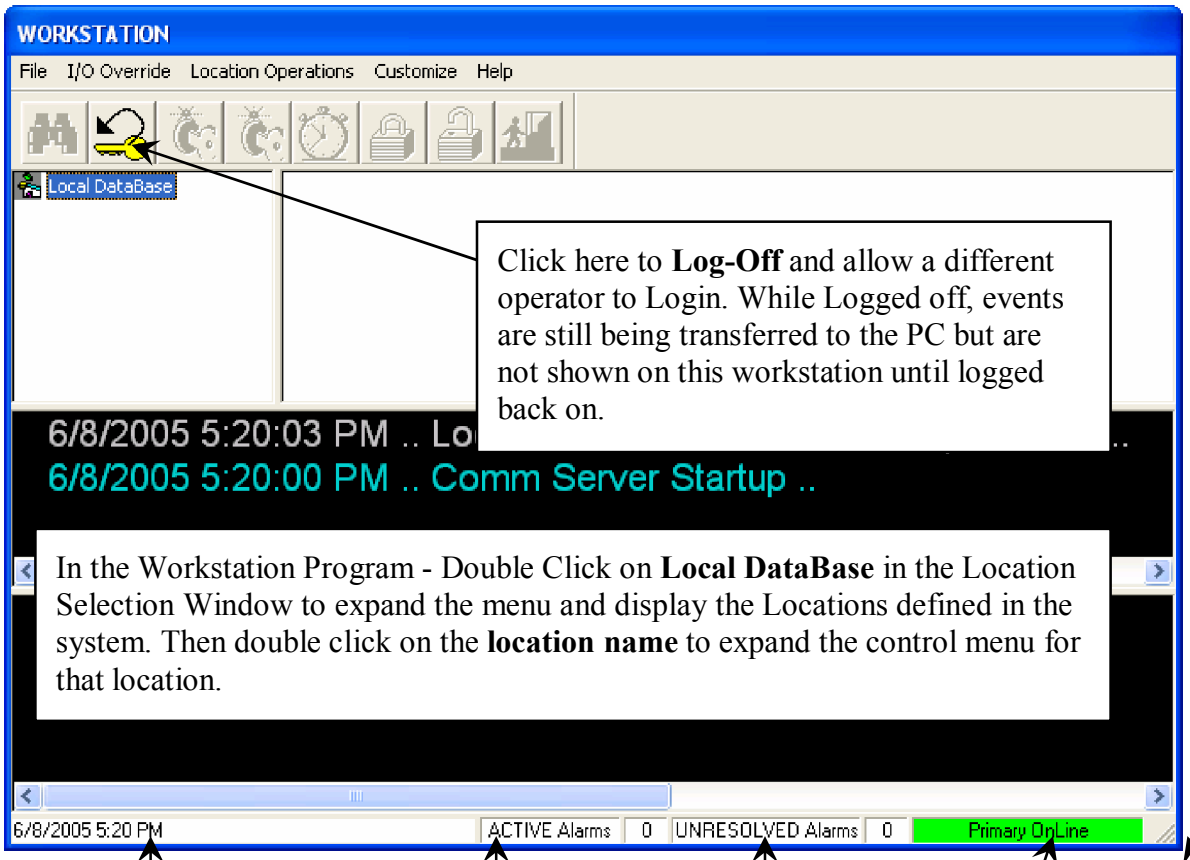
The Login Screen below is displayed when the program is started. Enter your User Name and Password. The Default User Name is **master**, the default Password is **master** both entered in all lower case.



Workstation

The **Workstation Program** provides the user visibility and control of the system. Workstation is where all activity is reported including alarms. Inputs, Outputs, Override Groups, and Maps are viewed and controlled from here.

What item is selected determines which Icons in the Toolbar are active. On the following pages, as different items are selected in the Selection Window you will notice different Icons will become active and inactive.



Click here to **Log-Off** and allow a different operator to Login. While Logged off, events are still being transferred to the PC but are not shown on this workstation until logged back on.

In the Workstation Program - Double Click on **Local DataBase** in the Location Selection Window to expand the menu and display the Locations defined in the system. Then double click on the **location name** to expand the control menu for that location.

System Date and Time

Active Alarm is a counter that displays the number of alarms that are currently active in the system. See Page 87, 97.

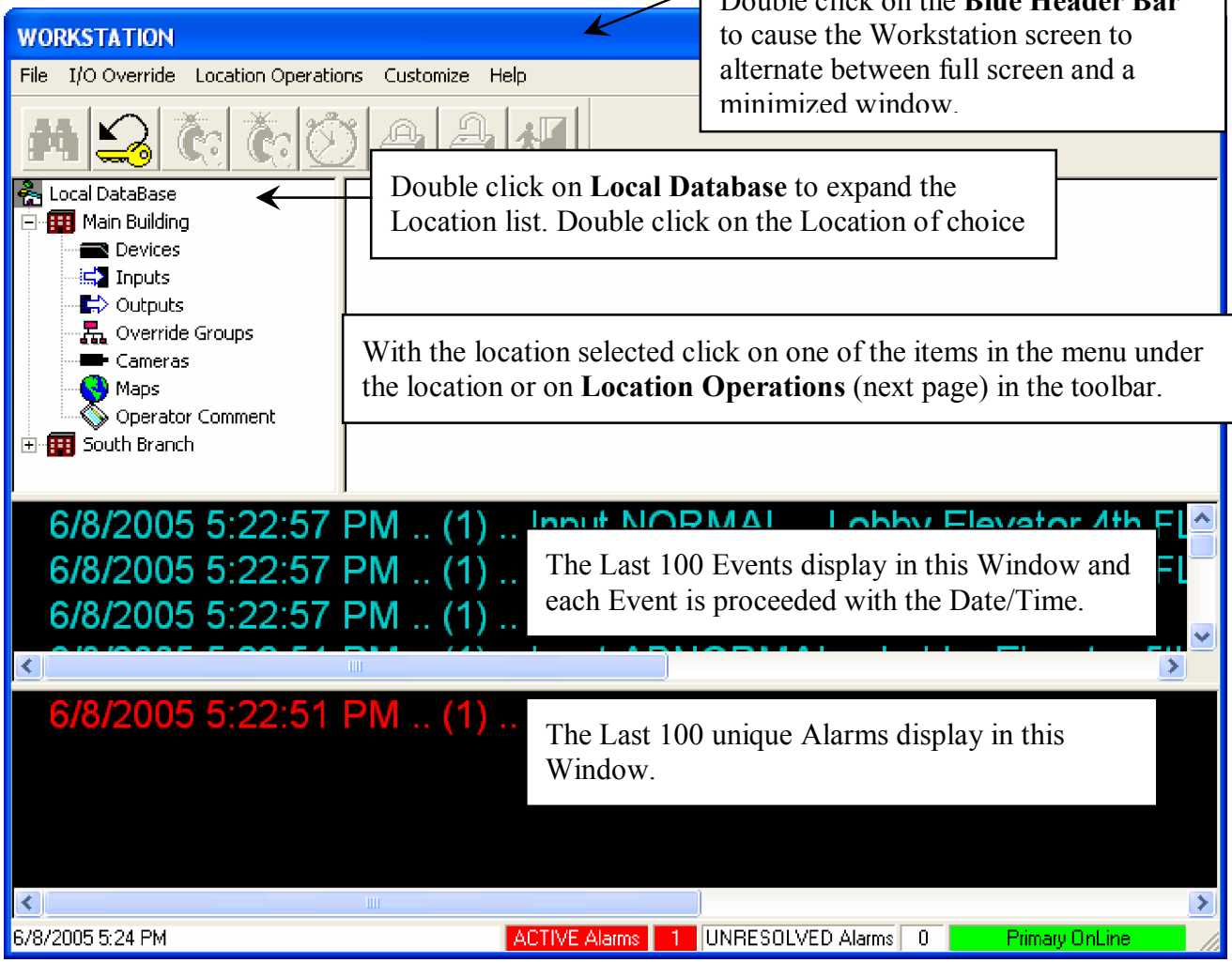
Unresolved Alarm is a counter that displays the number of alarms that have been acknowledged by the operator but have not been resolved.

Primary Online indicates the TCP/IP protocol is operational between the Comm Server program and the Workstation program.

Sizing Handle is used to resize and shape the Workstation program. Click on the diagonal lines and push and/or pull to make it larger, smaller, taller, and/or wider.

Location Operations

What item is selected determines which Icons in the Toolbar are active. On the following pages, as different items are selected in the Selection Window you will notice different Icons will become active and inactive.



Double click on the **Blue Header Bar** to cause the Workstation screen to alternate between full screen and a minimized window.

Double click on **Local Database** to expand the Location list. Double click on the Location of choice

With the location selected click on one of the items in the menu under the location or on **Location Operations** (next page) in the toolbar.

The Last 100 Events display in this Window and each Event is proceeded with the Date/Time.

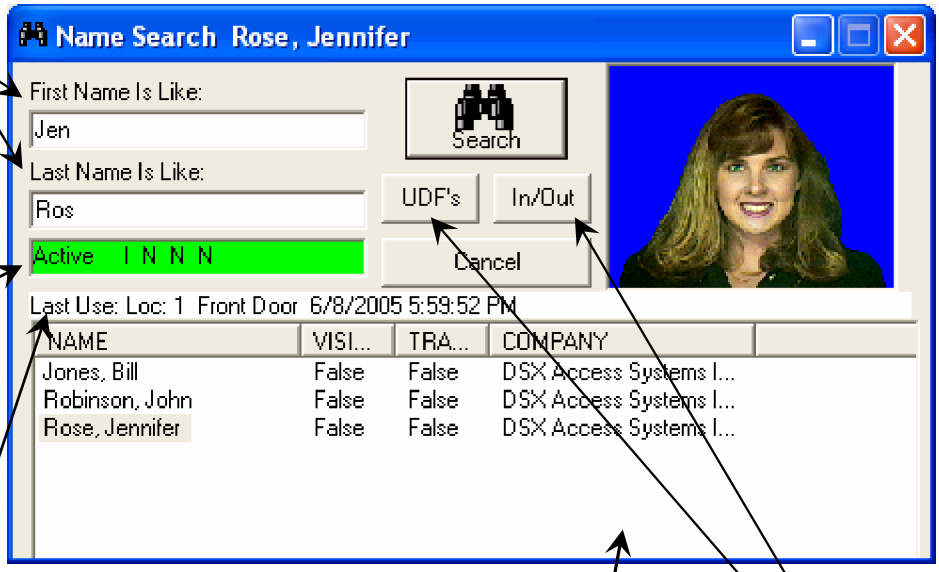
The Last 100 unique Alarms display in this Window.

Card Holder Search

Enter full, partial or no names in one or both of the fields below and click on Search to find all of the matches. **Search** alone will list all card holders alphabetically. The card holder image displayed is of the person selected otherwise the first person in the list. Use the arrow keys or mouse and scroll bar to move through the list.

Clicking on the picture that is displayed with the name will rotate through the available images so that the operator can view all saved images. This will not display signature images.

Click on the field titles *First/Last Name is Like* to access the Full Card Holder Search that is outlined on Page 35.



Active Card Holder Status is displayed in Green. Red designates De-Activated Card Holders.

The **AntiPassback** Status of In, Out or Neutral is displayed for the 4 possible Anti-Passback zones.

The **Last Card Use** is Displayed Here. The name of the door, the date, and the time is displayed in this field for the last use.

Name – Last Name first – of the Card Holders returned in the search list.
Visitor – True / False – notates the Card Holder is a visitor or not.
Trace – True / False – indicates whether or not the Card Holder is set for unique annunciation when they use their card.
Company – Displays which Card Holder Group the card holder is assigned.

UDF's Button when selected will alternate the list Window with a display of the selected card holder's User Defined Field Data.

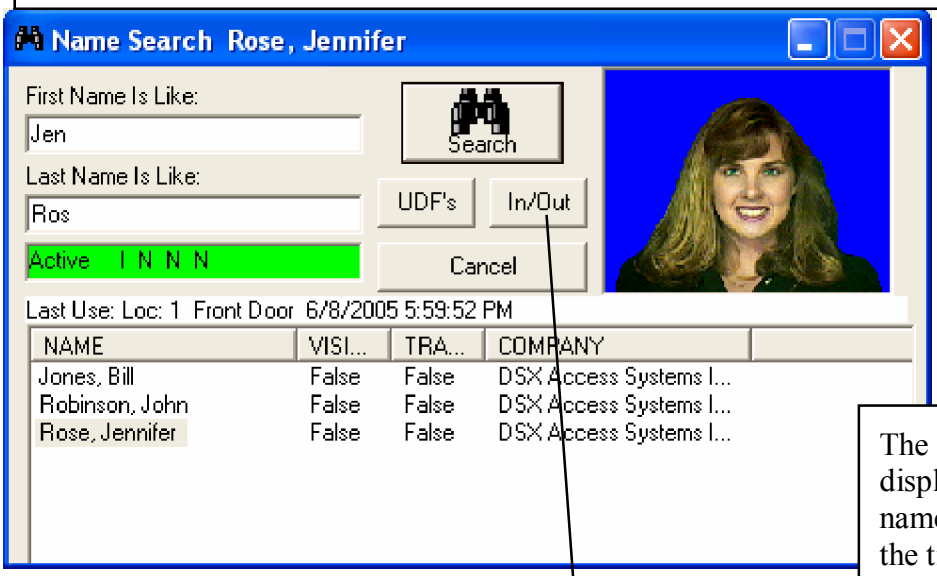
In/Out Button when selected will spawn a new screen displaying the Card Holders from the list in a color coded In/Out annunciator Window.
In – Green
Out – Red

Enter a name or partial name in the First and/or Last Name fields and then Click on *Search* to find the matches.

Guard Tour Note:
When Selecting a Card Holder or Guard to run a tour just click on the *Search* button and it will automatically return a list of only those card holders that have been designated as a Guard Tour Code.

In / Out Status

Double Clicking on the picture in an Image Recall window will cause that person's data to be displayed in the Card Holder Search screen shown below along with their picture.



Once you have performed the Card Holder Search as described on the previous page to find the group of card holders that you want to monitor the In/Out status of and Click on the In/Out button.

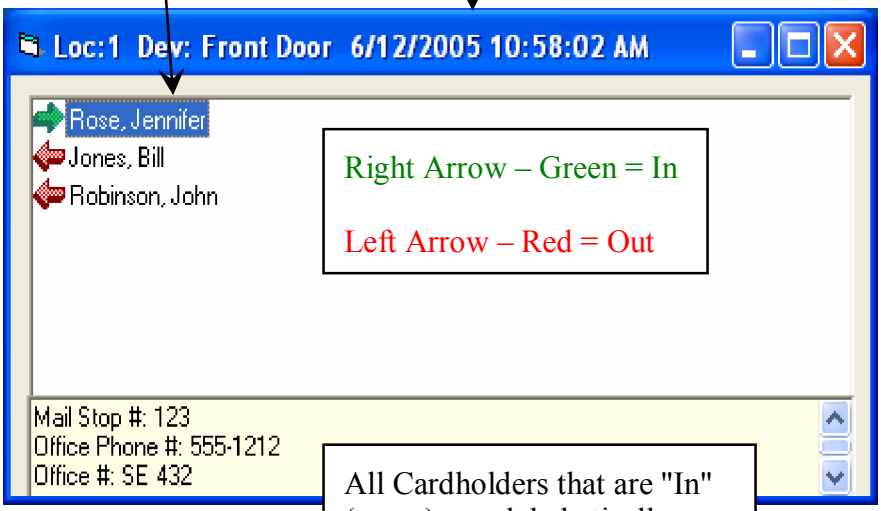
The **Status Bar** at the top displays the Last Card Use. The name of the door, the date, and the time for the last use is displayed in this field.

The Card Holders from the name search list are now displayed in a Status Window that updates once a minute automatically.

Left click one time on any cardholder to refresh that persons information.

Double left click on any cardholder to refresh the entire list.

Right click on a cardholders name to view that persons UDF data.

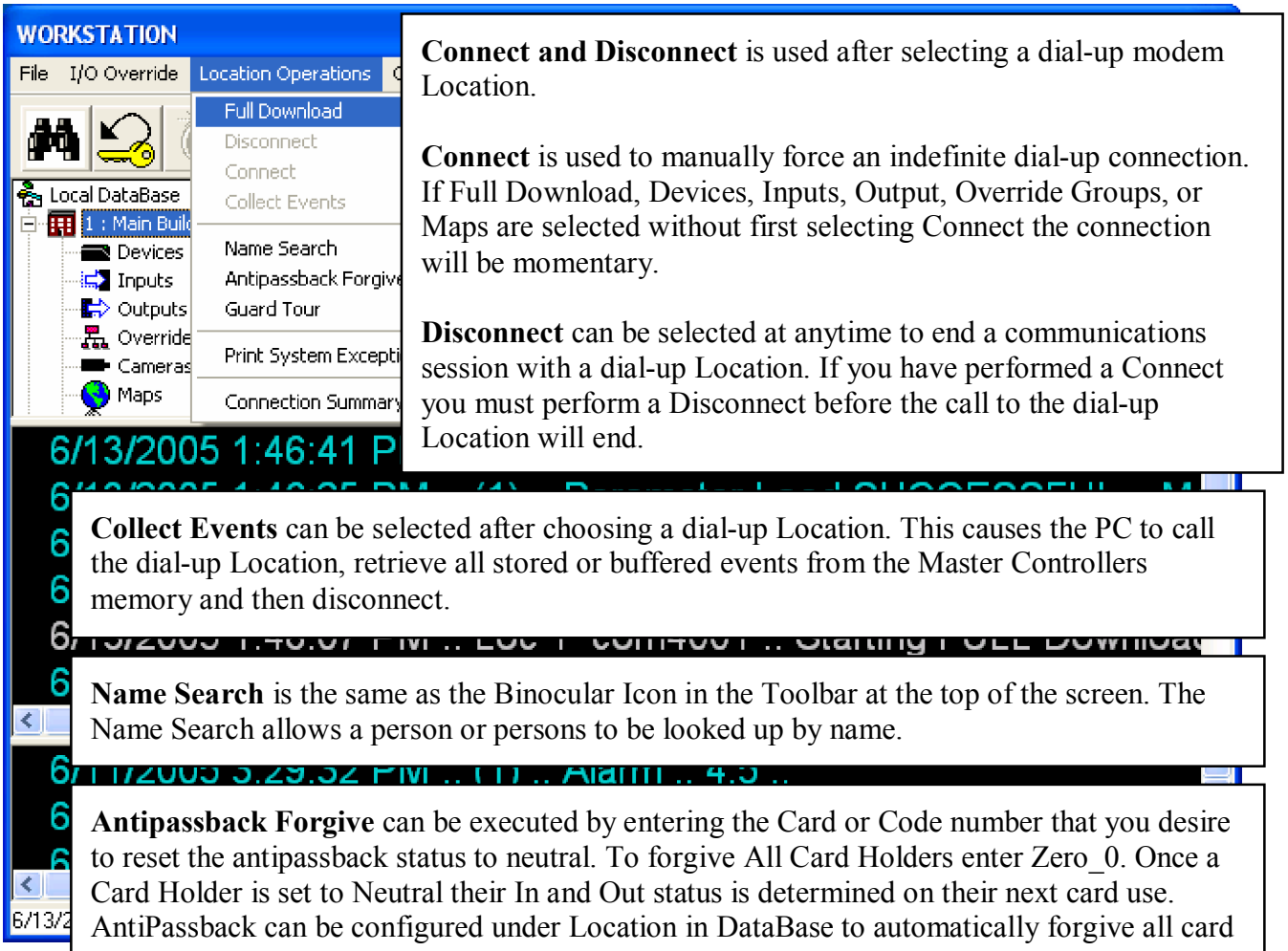


All Cardholders that are "In" (green) are alphabetically sorted to the top.

All Cardholders that are "Out" are alphabetically sorted to the bottom.

Location Operations

Full Download can be selected once the Location is selected. Selecting Full Download will cause a complete download of all data to the system field controllers.



Connect and Disconnect is used after selecting a dial-up modem Location.

Connect is used to manually force an indefinite dial-up connection. If Full Download, Devices, Inputs, Output, Override Groups, or Maps are selected without first selecting Connect the connection will be momentary.

Disconnect can be selected at anytime to end a communications session with a dial-up Location. If you have performed a Connect you must perform a Disconnect before the call to the dial-up Location will end.

Collect Events can be selected after choosing a dial-up Location. This causes the PC to call the dial-up Location, retrieve all stored or buffered events from the Master Controllers memory and then disconnect.

Name Search is the same as the Binocular Icon in the Toolbar at the top of the screen. The Name Search allows a person or persons to be looked up by name.

Antipassback Forgive can be executed by entering the Card or Code number that you desire to reset the antipassback status to neutral. To forgive All Card Holders enter Zero_0. Once a Card Holder is set to Neutral their In and Out status is determined on their next card use. AntiPassback can be configured under Location in DataBase to automatically forgive all card holders and set their status to neutral each day at midnight.

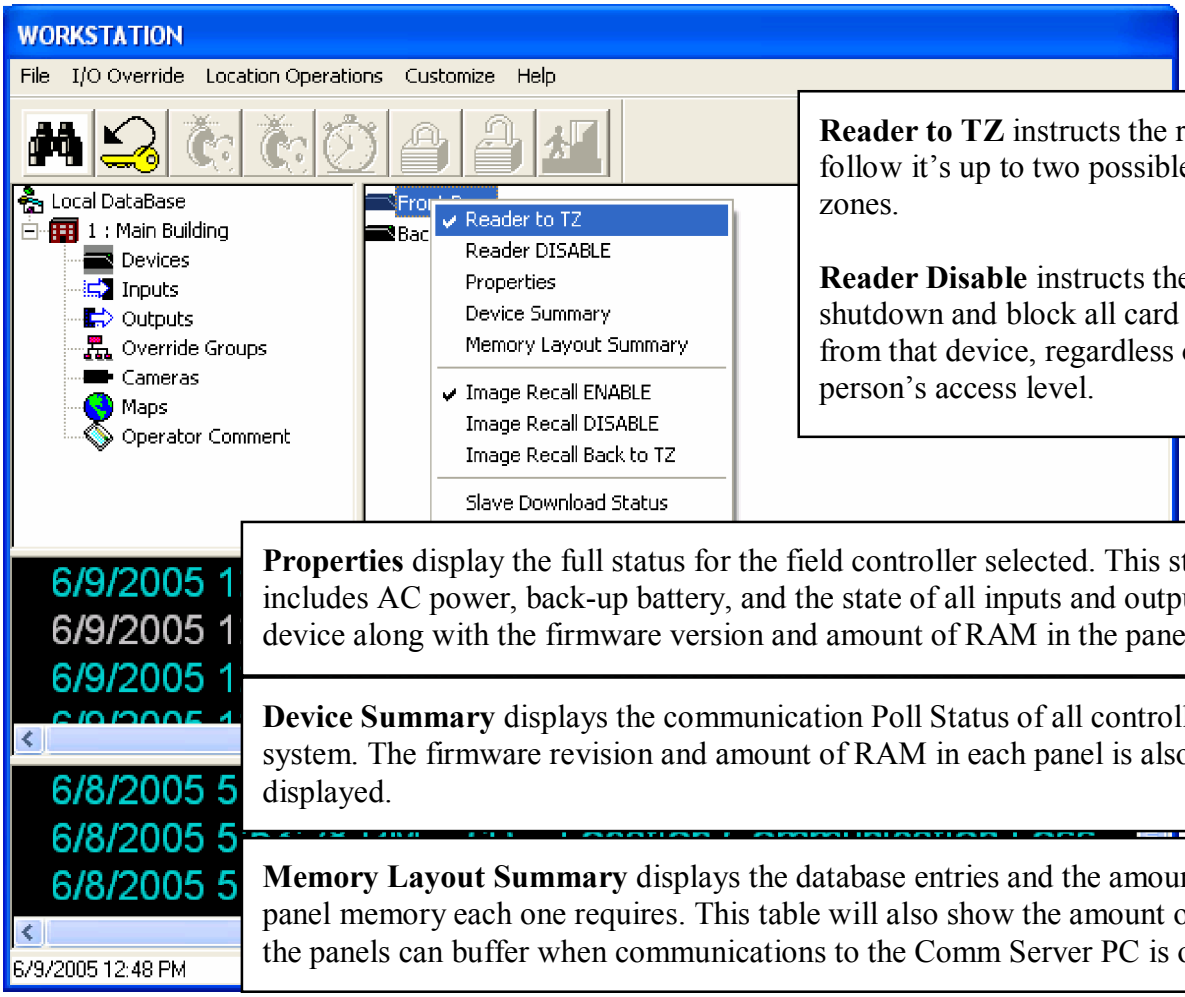
Guard Tour is where tours are selected, started, paused, resumed, canceled, and the Guards are selected to run the tour.

The **Print System Exceptions** is typically performed at shift change for a quick accountability of the overall system status. The report will print a list of any input that is in alarm or has been bypassed. It also shows any output that has been manually overridden, any reader that has been disabled, and all controllers that are offline and not communicating.

Connection Summary shows all locations and the communications port they are connected to. This window also displays the download progress between the comm server PC and the master field controller.

Devices

Devices display all card readers in the system. Readers listed with the red circle and slashes are not online. Click on one of the readers and/or keypad in the window below and click the right mouse button for the Device Command Menu.



Reader to TZ instructs the reader to follow it's up to two possible time zones.

Reader Disable instructs the reader to shutdown and block all card reads from that device, regardless of the person's access level.

Properties display the full status for the field controller selected. This status includes AC power, back-up battery, and the state of all inputs and outputs on that device along with the firmware version and amount of RAM in the panel

Device Summary displays the communication Poll Status of all controllers in the system. The firmware revision and amount of RAM in each panel is also displayed.

Memory Layout Summary displays the database entries and the amount of panel memory each one requires. This table will also show the amount of events the panels can buffer when communications to the Comm Server PC is offline.

Image Recall is where the card holders image is displayed in a positional window when their card is used at a reader set for image recall. Each reader can be programmed to perform Image Recall based on a time zone. The Recall can be manually controlled with the use of the Image Recall: **Enable, Disable, and Back to TZ** (schedule) commands.

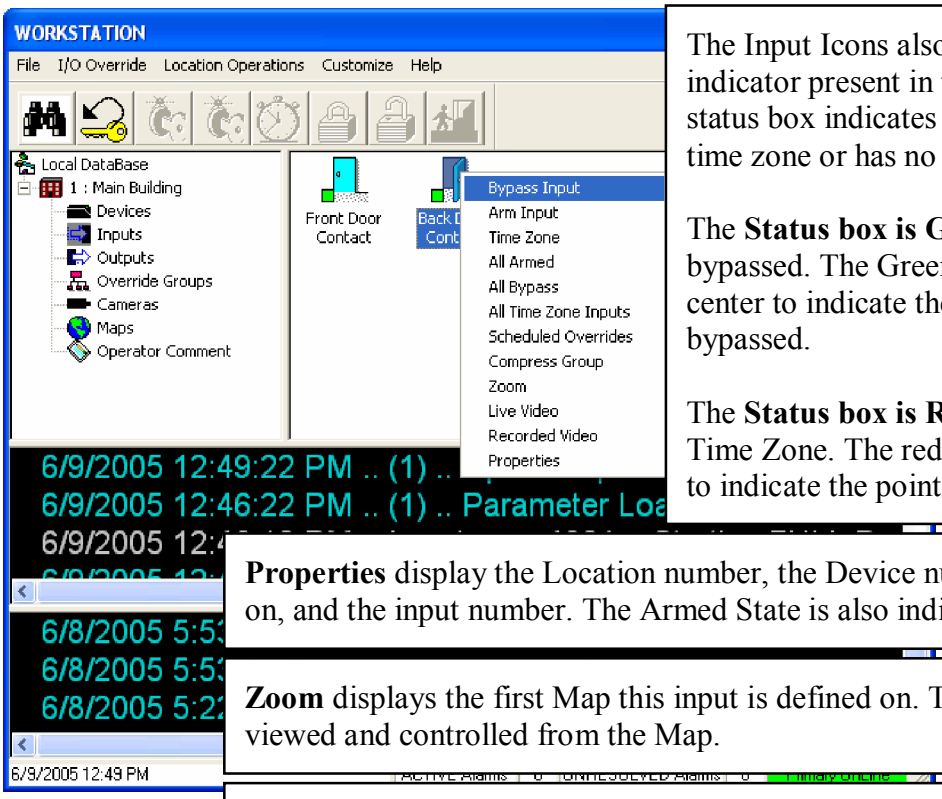
Manual Image Recall is invoked by clicking on one of the card read events in the upper event window.

To Remove the image display window select the Customize Menu at the top of the screen and click on Image Recall Window or right click the image itself.

Slave Download Status to show if any slave controllers are in a download state.

Inputs

Inputs have two Icons that represent their status. One Icon is displayed for the normal state and the other for the abnormal state. This could be the door open and door closed icons. The Icons will alternate and update automatically to reflect changes in status.



The Input Icons also have an armed status indicator present in the lower left corner. No status box indicates the input is disarmed by time zone or has no time zone assigned.

The **Status box is Green** if the point is auto bypassed. The Green box has a Dot in the center to indicate the point is manually bypassed.

The **Status box is Red** if the point is armed via Time Zone. The red box has a Dot in the center to indicate the point is manually armed.

Properties display the Location number, the Device number this inputs resides on, and the input number. The Armed State is also indicated here.

Zoom displays the first Map this input is defined on. The input status can be viewed and controlled from the Map.

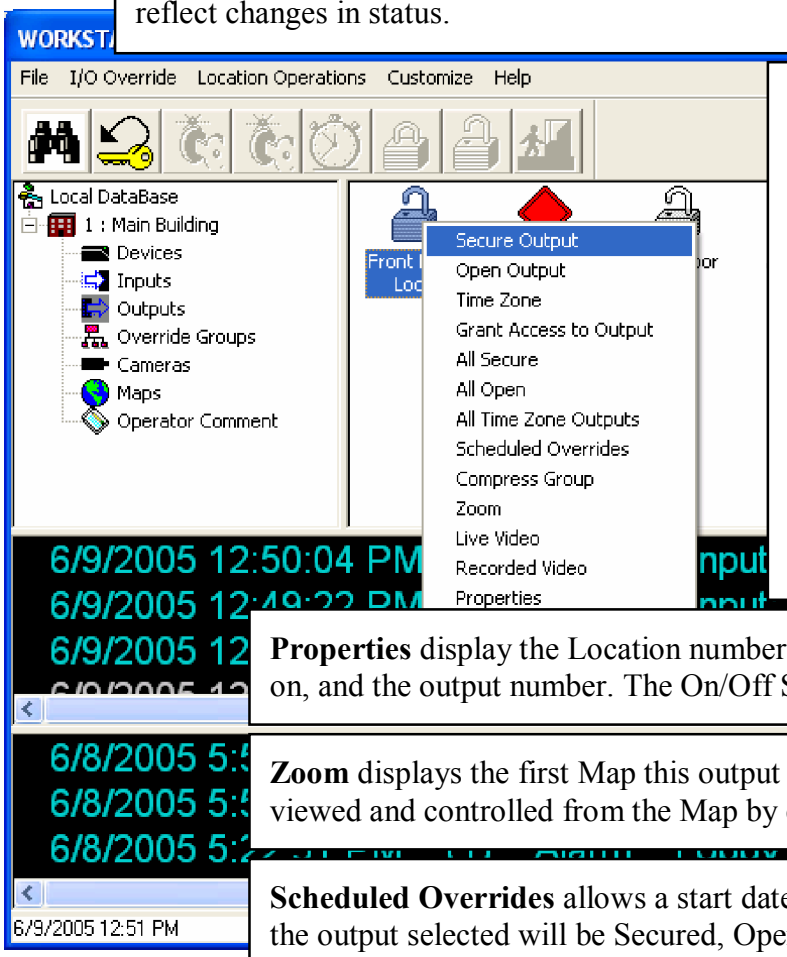
Scheduled Overrides allows a start date and start time to be defined as to when the input selected will be armed, bypassed, or set to time zone. A stop date and stop time is also defined with the possibilities of Arm, Bypass, Time Zone as an action.

Cameras displays the Camera Control Screen associated with this input. Control includes Pan, Tilt, Zoom, Scan, and two programmable Functions.
Live Video to display live video from the camera associated with the alarm point.
Recorded Video to display recorded video from the camera associated with the alarm point.

Bypass sets the input to manually disarmed state. The input will not follow its normal time zone until commanded to do so.
Arm sets the input to a manually active state allowing it to report a faulted condition as a priority alert.
Time zone sets the input to follow its preprogrammed time of day and day of week schedule.
All Commands apply the command listed to all inputs displayed in this window.

Outputs

Outputs have two Icons to represent their status. One Icon is displayed for the Open state and the other for the Secure state. The Icons will alternate and update automatically to reflect changes in status.



The Output Icons also have a status indicator in the lower left corner. No status box indicates the output is open by time zone or has no time zone assigned.

The **Status box is Green** and has a Dot in the center to indicate the point is manually or linked Opened.

The **Status box is Red** if the point is Secure (On) via Time Zone. The box has a Dot in the center to indicate the point is manually or linked Secured.

Properties display the Location number, the Device number this output resides on, and the output number. The On/Off State is also indicated here.

Zoom displays the first Map this output is defined on. The output status can be viewed and controlled from the Map by clicking the right mouse button.

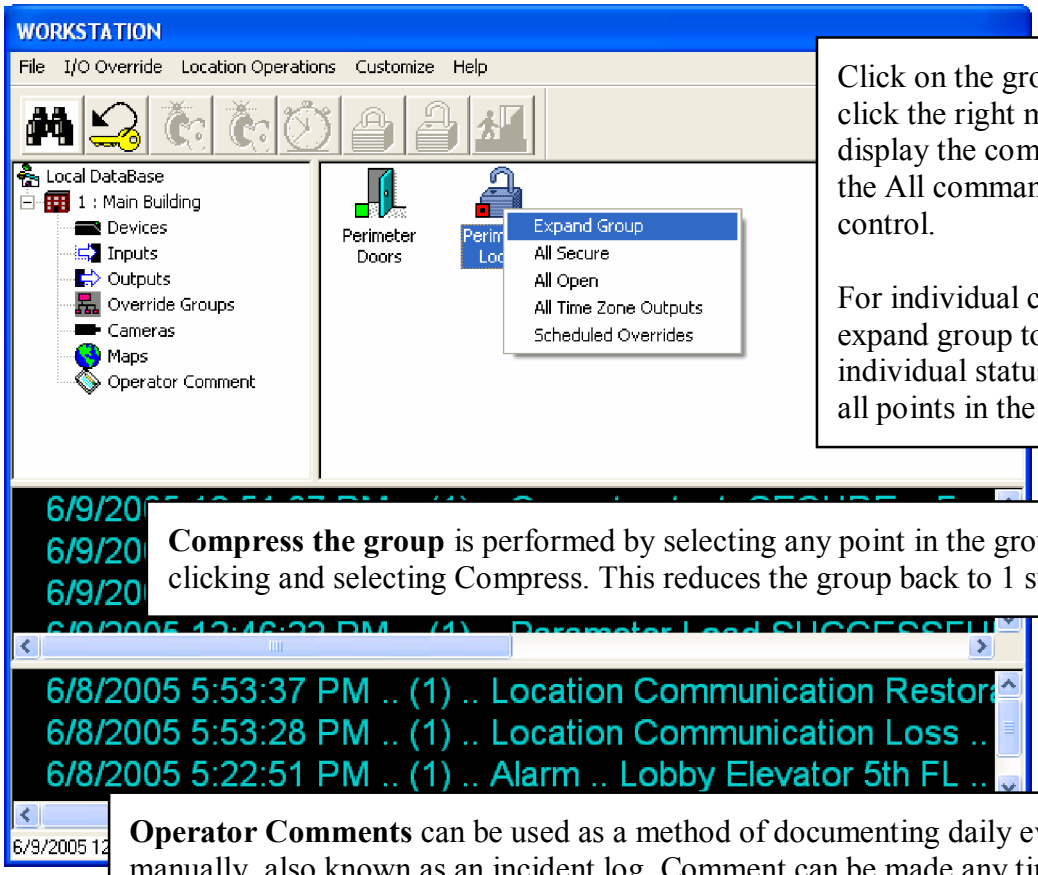
Scheduled Overrides allows a start date and start time to be defined as to when the output selected will be Secured, Opened, or set to time zone. A stop date and stop time is also defined with the possibilities of Secure, Open, and Time Zone.

Cameras displays the Camera Control Screen associated with this Output. Control includes Pan, Tilt, Zoom, Scan, and two programmable Functions.
Live Video to display live video from the camera associated with the output.
Recorded Video to display recorded video from the camera associated with the output.

Secure sets the output to a manually energized state. The output will not follow its normal time zone until commanded to do so.
Open sets the output to a manually de-energized state thereby unlocking or unsecuring the device being controlled. The output will not follow its normal time zone until commanded to do so.
Time zone sets the output to follow it preprogrammed time of day and day of week schedule.
All Commands apply the command listed to all outputs displayed in this window.

Override Groups / Comments

Override Groups allow inputs or outputs to be grouped together utilizing a single set of Icons to show the summary status of all points in the group. This also allows for unitized control for all points in the group. Inputs and Outputs cannot be in the same group.

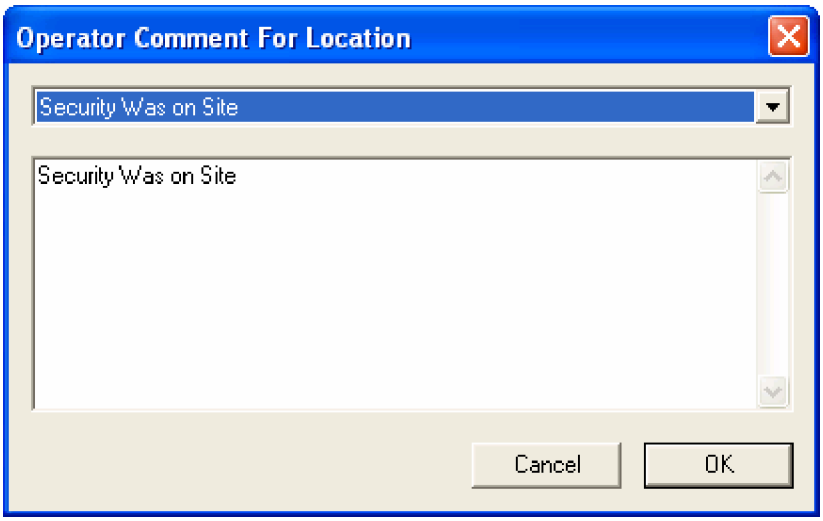


Click on the group of choice and click the right mouse button to display the command menu. Use the All commands for group control.

For individual control select expand group to view and have individual status and control over all points in the group.

Compress the group is performed by selecting any point in the group, right clicking and selecting Compress. This reduces the group back to 1 summary Icon.

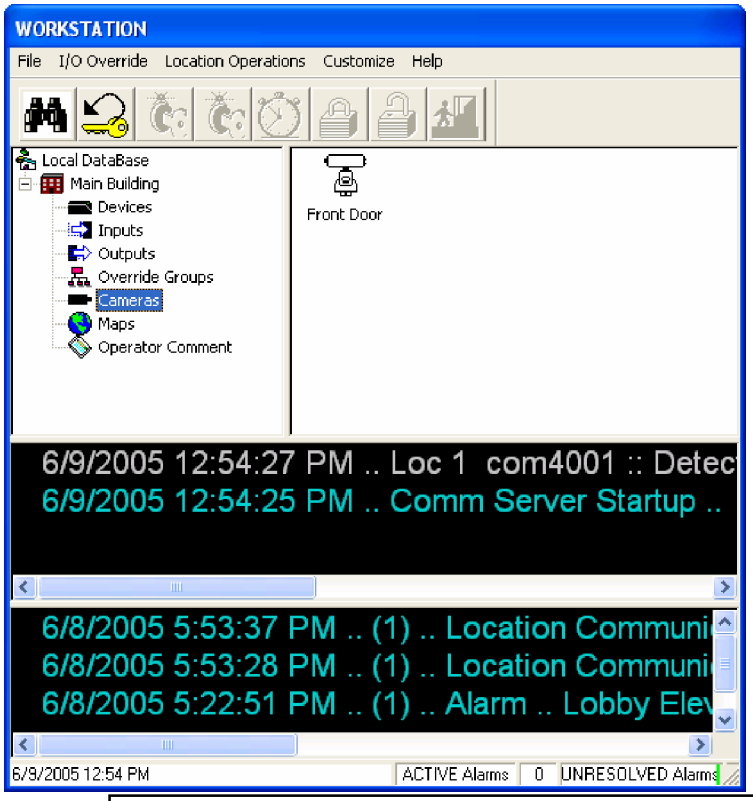
Operator Comments can be used as a method of documenting daily events manually, also known as an incident log. Comment can be made any time by selecting Operator Comments from the menu.
Predefined comments can be selected from the drop down menu.
Free format comments can be used instead of or in addition to the selection box.

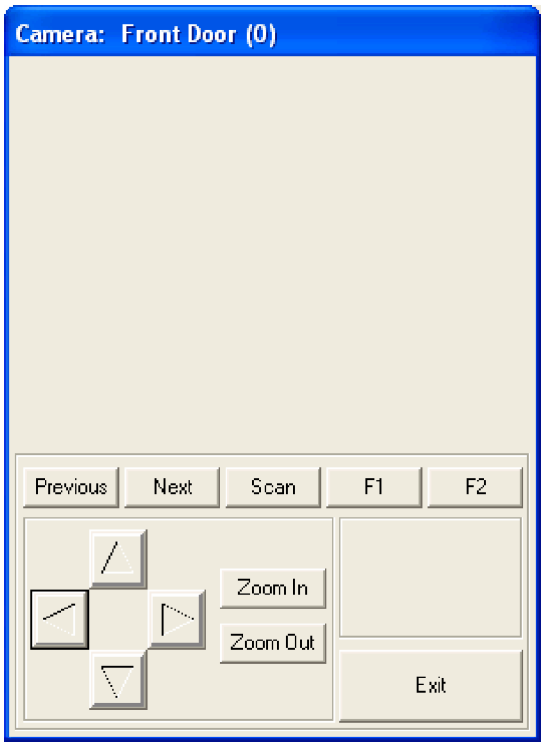


Cameras

Camera control allows the operator to select a camera from a list or from a map and view/control that camera directly from the WinDSX software. Control includes Pan, Tilt, Zoom, Scan, and two programmable Functions. The system can be interfaced to any CCTV switcher that accepts RS-232 ASCII commands or from any supported Digital Video Recorder.

Camera Control can be used in conjunction with Image Recall. The card holder presents their card, which does not unlock the door but instead invokes Image Recall and their stored image is displayed on screen. The Operator then looks at the live video from that doors camera and determines if the stored image and the live video are of the same person. If so the operator can then unlock the door.





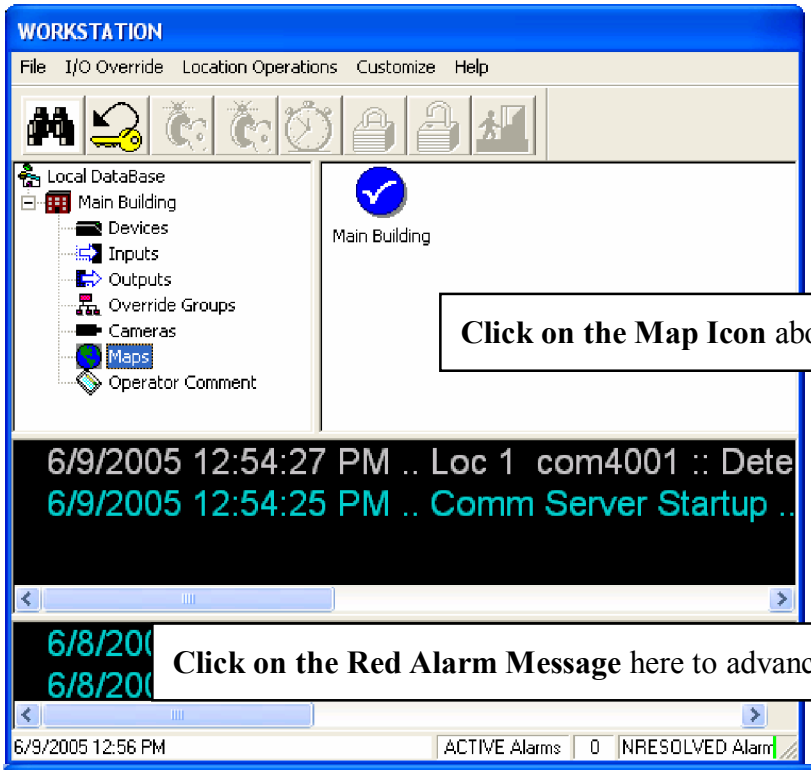
Previous and Next select other cameras defined in the system.

Arrow Up, Down, Left, and Right buttons are the Pan and Tilt controls.

The **Output** that is assigned to the Camera is displayed here. Right click on the Output listed for the standard Output Control Menu.

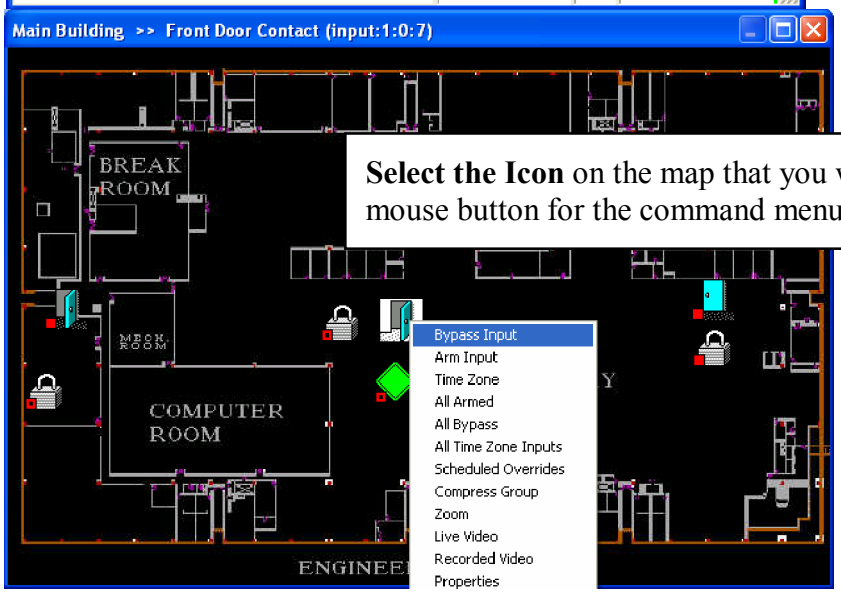
Maps

Maps allow graphic files to be displayed that can vary from blue-print type floor layout drawings to photos taken with a digital camera. Inputs, Outputs, and Override Groups are placed on the Maps, viewed, and controlled with their Icon. Input and Output Status is Live on the Maps. Maps can be configured to automatically display upon designated input alarms.



Click on the Map Icon above to display that map.

Click on the Red Alarm Message here to advance to the Alarm handling screen.

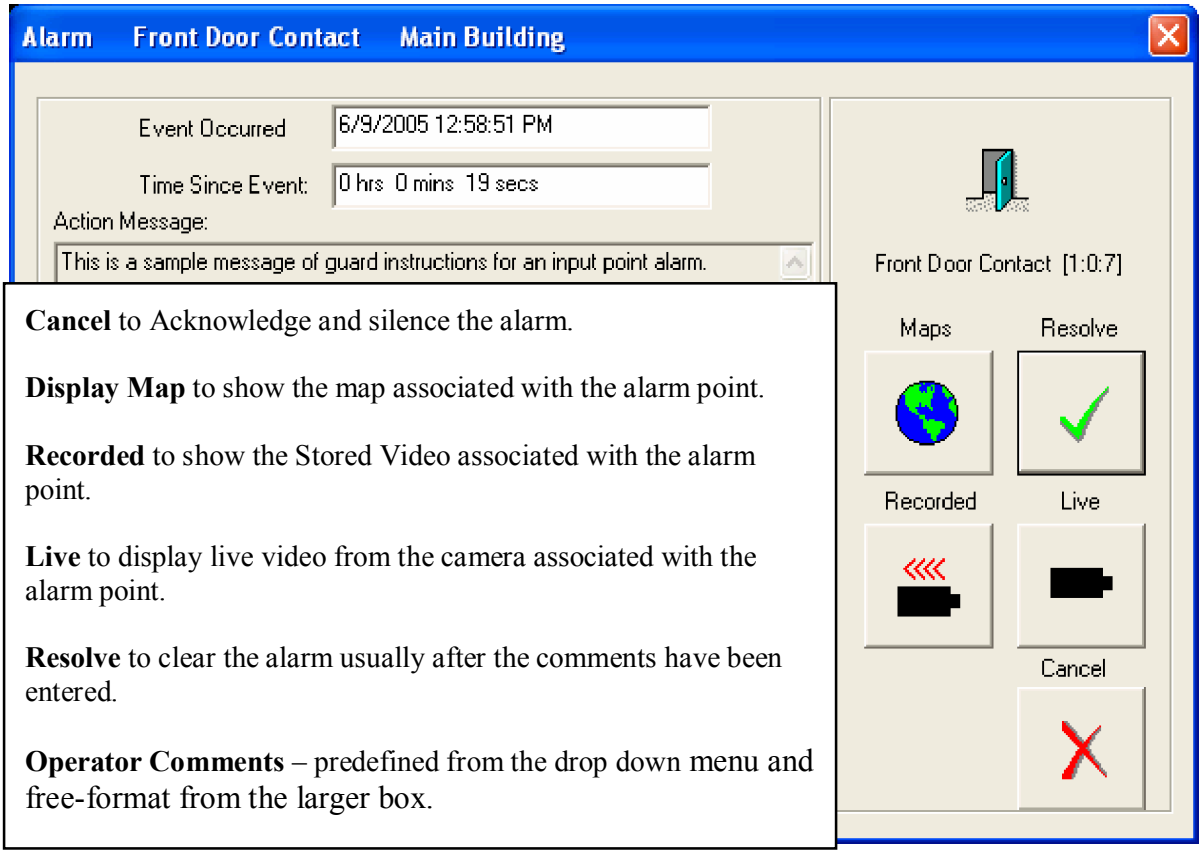


Select the Icon on the map that you wish to control and click the right mouse button for the command menu.

To Close right click anywhere on the Map there is not an Icon and the Map will close.

Alarms

Alarms are selected by clicking on them from the Workstations scrolling Alarm Window. The alarm is then shown here along with optional Action Message (response plan) to instruct you on what steps to take as a result of the alarm.



Cancel to Acknowledge and silence the alarm.

Display Map to show the map associated with the alarm point.

Recorded to show the Stored Video associated with the alarm point.

Live to display live video from the camera associated with the alarm point.

Resolve to clear the alarm usually after the comments have been entered.

Operator Comments – predefined from the drop down menu and free-format from the larger box.

Event Text Size allows the user to change the size of the event text in both the Alarm and Event scrolling windows.

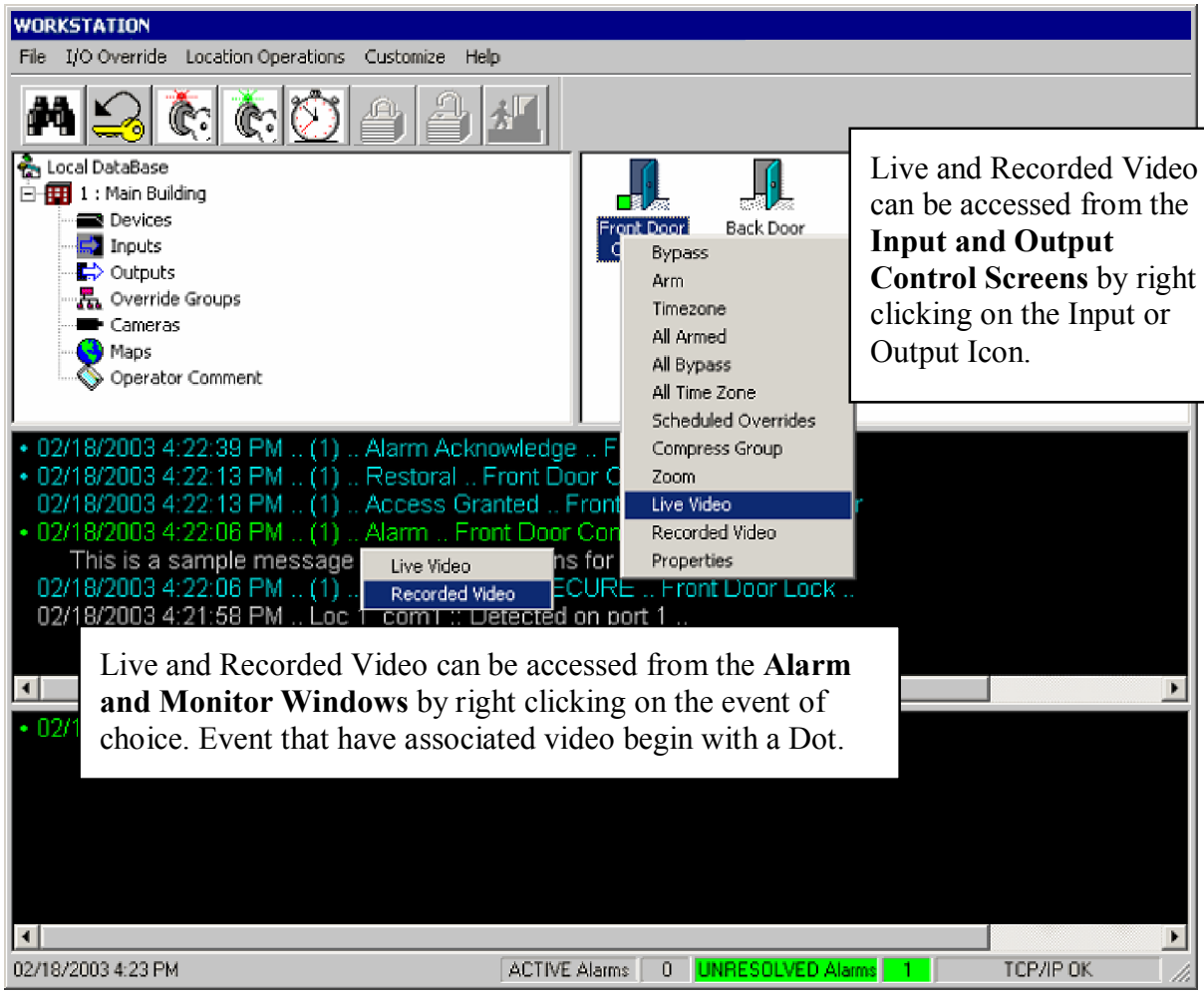
Alarm PopUp Window allows alarms to activate a popup window that announces the alarm regardless of what program you are in and gives you the option to go to workstation and acknowledge the alarm or to ignore it.

Image Recall Window globally enables or disables the displaying of the card holders stored image. The Image Recall selection is also toggled (selected) to clear the image display window.

Toggle I/O List Mode Selecting this changes the Icon view of Inputs and Outputs to a list view that allows for more points to be viewed in the same amount of space.

DVR Operations

WinDSX has the ability to integrate with different **Digital Video Recorders**. This integration allows stored and live video from the DVR to be accessed within the DSX software. All video is transmitted across a Local Area Network connection.



Live and Recorded Video can be accessed from the **Input and Output Control Screens** by right clicking on the Input or Output Icon.

Live and Recorded Video can be accessed from the **Alarm and Monitor Windows** by right clicking on the event of choice. Event that have associated video begin with a Dot.

Recorded Video can also be viewed while running a **History** report. Simply highlight the event you would like to see the video for and click the "Show Video" button. The system will find the video that matches the event time and date and display it on screen.

Live and Recorded Video can be accessed from **Alarm Maps** by right clicking on an Input/Output or Camera Icon.

DVR Operations

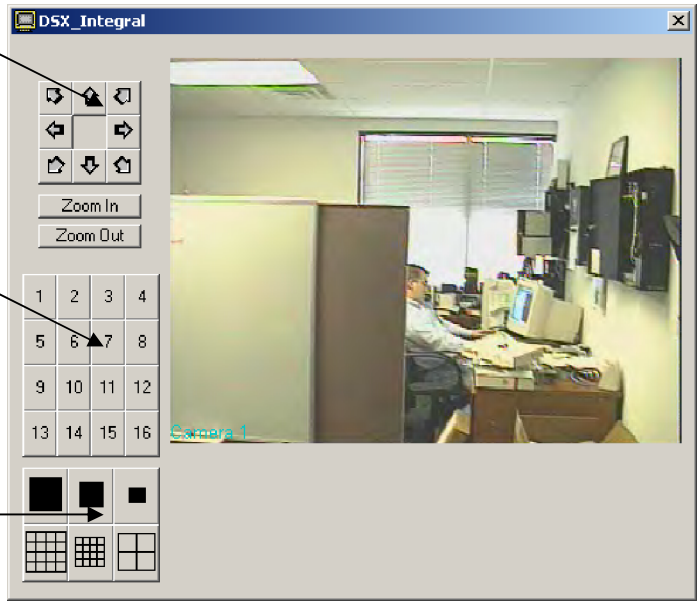
WinDSX Live Video Interface

(All features may not be available on some DVRs)

Pan, Tilt, Zoom functions are available for Cameras that support those features. Click on any of the Arrow Keys to Move the Camera in that Direction. Click on the Zoom In and Zoom Out Buttons for a larger or smaller view.

Camera Positions can be changed once the DVR Live Video Screen is displayed. The different camera positions can be selected from the number pad. Right clicking on the number pad toggles the pad from positions 1-16 to 17–32.

Frame Views can be changed by selecting the different frame buttons to the right. Small, medium and large as well as multi-camera views can be selected. If a camera is defined in WinDSX as more than 1 DVR camera the multiple frame windows are automatically displayed.

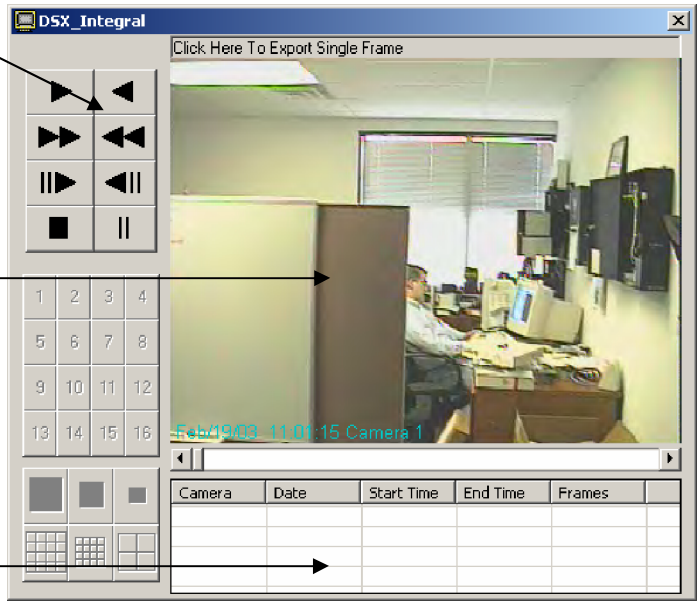


WinDSX Stored Video Interface

Stored Video Position Commands are used similarly to those of a VCR. There are from left to right/top to bottom – Forward, Rewind, Fast Forward, Fast Rewind, Jump to End, Jump to Beginning, Stop, and Pause.

Stored Video Zoom In and Out is possible by moving the mouse pointer over the part of the stored video you desire to zoom in on and click the left mouse button. Each time the left mouse button is clicked the focus of the screen is changed to the position of the mouse pointer and the frame is zoomed. Right clicking the mouse will cause the frame to zoom out. Not available on all DVR's.

The Video Log is an option with some Digital Video Recorders. It will display the Camera Position, Date, Start and End Times and the number of Frames.



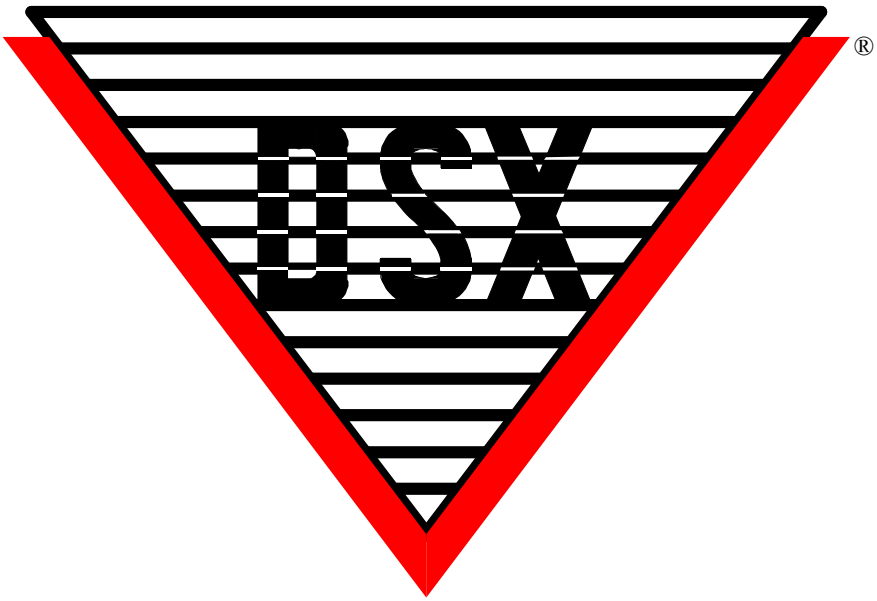
Message Definitions

Following is an alphabetized list of System Messages that will appear in the Alarm and Event windows of the Workstation program.

Workstation Messages	Message Description
AC power is HI	The AC Power at the field controllers is too high and should be corrected.
AC power is OK	The AC Power at the field controllers has returned to normal.
AC power loss	The AC Power at the field controllers has been lost or is running too low.
AC power restored	The AC Power has returned to normal.
Denied..Passback Violation	A card has been used at an In or Out reader more than once in a row.
Denied..Card + PIN Error	A card was used followed by an incorrect PIN number at the Keypad.
Denied..Unknown Code	A card that is not valid at any reader. Check code, status, and access level.
Denied..Code ReUse Timer	A card was used at a reader more than what is allowed. Timed Anti-Pass Back.
Denied..Unknown Facility Code	A card was used with a facility code that is not known or allowed at a reader.
Denied..Wrong Access Level	A card was used at a reader that it is not allowed.
Denied..Parity Error	An error was received by use of an invalid card or card was swiped backwards.
Denied..Invalid PIN	An invalid or unknown PIN was used at a Reader/Keypad in Keypad only mode.
Denied..TimeZone Inactive	A card was used at a reader outside the time-day/day-week schedule allowed.
Denied: MAX reader BITS Exceed	An invalid or non-programmed card format was used at a reader.
Access Granted	A valid card/code was used at a Reader/Keypad controlled entry point (door).
Access Granted *Passback Violat	Access was granted but there was a Soft Anti-passback violation.
Action Message	An Action Message is a predefined response plan for the operator to follow.
Alarm	Alarm is followed by where or what caused the alarm to occur.
Alarm Acknowledge	An alarm has been acknowledged and silenced by an operator.
Alarm Resolution	An alarm has been resolved and cleared with the cause documented.
Anti-passback Forgive	Indicates that one or all card holders have had their status set to neutral.
Attempting Connection	The Comm Server is initiating a dial-up communication link.
Available Disk Space is low	Free hard disk space on the resource where history is written is critically low.
Bad card read	A card read was received with a different number of data bits than expected.
Bad DATE in Log	A field controller has sent an illegal or out of range date.
Battery is Low	A field controller has detected and reported a low battery. Call for Service.
Battery is OK	A field controller had a low battery that has now restored to normal.
Broadcast Download Complete	The download of data to all field controllers is complete.
Call In From undefined Location	A Master Controller has been addressed as a Location that is not defined.
Code ACTIVATE	The system has turned on a card or PIN by the activation date set in database.
Code DEACTIVATE	The system has turned off a card or PIN by the de-activation date set.
Comm Server Exit	The Comm Server program has been exited which halts all communication.
Comm Server Startup	The Comm Server program (cs.exe) has been started.
Consecutive DENIED Exceeded	The number of consecutive access denieds has caused a reader to lock out.
Device Comm. Loss	Communications has been lost to a slave field controller. Call for Service.
Device Comm. Restoral	Communication has been regained to a slave field controller.
Device NOT reporting	A field controller is not reporting to the system.
Door Open too long	The reader/keypad controlled door has been held open to the point it is in alarm.
Download Checksum Discrepancy	The field controller's download does not match what it should have.
Exit Request	A request for exit was made at a reader controlled door.
Generic Messages	No information listed.
Guard Tour Canceled	A Guard Tour in progress was canceled by an operator in Workstation (ws.exe).
Guard Tour Exception	A Guard was late to check in to one of the Tour Stations.
Guard Tour Initiated	A Guard Tour was started by an operator in the Workstation program (ws.exe).
Guard Tour Paused	A Guard Tour in progress was paused by an operator in Workstation (ws.exe)

Message Definitions

Guard Tour Restarted	The Guard Tour was restarted by an operator in Workstation.
Input ABNORMAL	An input has become faulted. (door open)
Input NORMAL	An input has returned to normal. (door shut)
Insufficient memory at remote	The field controller does not have enough memory to hold the data being sent.
Location Communication Loss	The system has lost communication the master field controller. Call for Service
Location Communication Restoral	The master field controller has regained communication.
Location Password Failed	A dial-up modem location has a password different than the system software.
Log Report Request from Location	The controllers memory is full and is requesting the PC to take a stored event.
Memory Stack OverFlow !!!	The panels processor stack has overflowed. Call for Service.
Message RETRY	There has been a disruption in communication and the system is trying again.
Modem Hang Up ERROR	The modem disconnected abnormally.
Open (tz)	The door unlocked via its preprogrammed door schedule.
Operator Comment	The operator has selected/entered message as to the occurrence of an alarm.
Operator Comment Text	The comment selected or entered by the operator follows this header.
Opr set Device: Disabled	A reader and/or keypad was manually disabled by the operator.
Opr set Device: TZ	A reader and/or keypad was manually set to follow it time zone (schedule).
Opr set input: ALL ARM	The operator manually armed all alarm points in the system.
Opr set input: ALL BYPASS	The operator manually bypassed or disarmed all alarm points in the system.
Opr set input: ALL TZ	The operator set all alarm point to follow their time zones (schedules).
Opr set input: ARM	The operator manually armed the alarm point selected.
Opr set input: BYPASS	The operator manually disarmed the alarm point selected.
Opr set input: TZ	The operator set the alarm point to follow its time zone (schedule).
Opr set output: ACCESS	The operator manually unlocked the door for the normal unlock time.
Opr set output: ALL OPEN	The operator manually unlocked all doors and opened all outputs in the system.
Opr set output: ALL SECURE	The operator manually locked all doors and secured all outputs.
Opr set output: ALL Time Zone	The operator manually set all doors to follow their time zone (schedule).
Opr set output: OPEN	The operator manually unlocked the door or set the selected output open.
Opr set output: SECURE	The operator manually locked the door or set the selected output secure.
Opr set output: TZ	The operator set the door back to its time zone (schedule).
Parameter Load request	The Master Controller has been reset and is requesting a download from the PC
Parameter Load SUCCESSFUL	The Master Controller has successfully received a download.
Phone connection failure	There has been a phone connection lost to a dial-up modem site.
Remote Event Log OVERFLOW	The panel has stored events offline to the point the oldest are being overwritten.
Restoral	This is the inverse of alarm. The condition has returned to normal.
Secure (tz)	The output has secured by time zone (schedule).
Serial Port FAILURE	The serial communications port of the PC has failed. Call for Service.
Slave Checksum Discrepancy	A slave controller's download is not complete or correct.
Slave Download Complete	A slave controller has received a full download and the download is finished.
Slave Parameter Request	A slave controller has been reset and is requesting a download.
Starting Full Parameter Load	A full download is being initiated from the PC to the master field controller.
Starting Incremental Update	A download of the changes made to the database starting from PC to master.
System operations	Midnight routine that activates and de-activates cards and performs backups.
Trouble Restoral	An input point with a circuit fault has returned to normal.
Trouble: Circuit Open	An input point has detected an open circuit. Call for Service.
Trouble: Circuit Shorted	An input point has detected a short circuit. Call for Service.
TZ change .. overridden	An input or output was set manually when a time zone (schedule) tried to start.
Unknown Event Type	No definition.



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