# WIN-PAK 2.0

## Operator
## Quick Reference
## Guide

NORTHERN
COMPUTERS, INC.

ADEMCO
GROUP
INTEGRATED SYSTEMS

# Contents

# Introduction

This Operator Quick Reference Guide is intended to help with day to day use of the WIN-PAK system, after it has been installed and programmed. It briefly describes the toolbar buttons and lists the toolbar menus and their commands.

In addition, it contains procedures for frequently performed tasks including adding a card holder, adding an access level and a time zone. It contains a brief section the Floor Plan view and the Alarms view, and tells how to generate and print reports.

For more detailed information on any of these topics, please consult the WIN-PAK 2.0 User Guide.

# Main Window

The WIN-PAK 2.0 user interface allows you to setup, monitor and maintain all aspects of your access control system.

## Title Bar and Menu Bar

Once a user is logged on, the title bar at the top of the screen displays the name of the operator, and if the software has not been registered, the number of days remaining on the initial license is also displayed.
The main menu bar and toolbar are available.
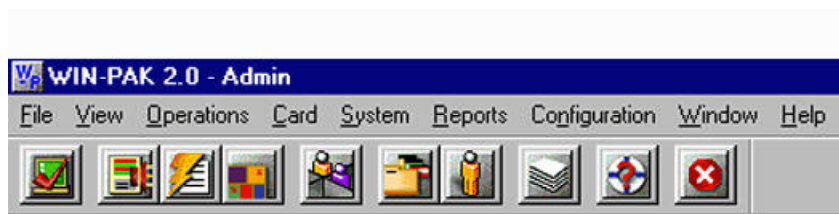


## Toolbar Buttons

**Log In** - Opens the Log In window, allowing operators to log in to the User Interface and connect to the Database Server.

**Dynamic Alarm View and Acknowledge** - Opens the Alarms view. Incoming alarms can be viewed, acknowledged, and cleared. Right-click menus provide access to control functions.

**Event View** - Opens the Events view, displaying current system activity in real-time.

**Floor Plan View** - Opens the Floor Plan database main window, allowing the operator to open selected floor plans.

**Locate** - Opens the Locate dialog box, allowing the operator to search, by card holder name or card number, for the last time and place a card was used.

**Card Database** - Opens the Card Database main window, allowing the operator to search and sort the card list,

and add, edit or delete cards. Badge layouts can be added to cards and badges can be printed.

**Card Holder Database** - Opens the **Card Holder Database** main window, allowing the operator to search and sort the cardholder list, and add, edit or delete card holders. Card Holder photos and signatures can be imported, captured and viewed from this the Card Biometrics tab in the Card Holder database.

**Reports** - Opens the Reports database main window, allowing the operator to generate, view and print reports.

**Help** - opens the Help menu, providing access to on-line help files, and connections to Northern's website and e-mail.

**Log Off** - Logs the operator out of the User Interface.

## Menus



## File Menu
Log In
Log Out
Configure Badge Printer
Reports
Workstation Defaults
System Defaults
Database Maintenance
Exit  _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _

## View Menu
Select Language
Toolbar
Status Bar  _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _

## Operations Menu
Locate
System Events
Events
Alarms
AutoCard Lookup
Live Monitor
Floor Plan
Control Map
Guard Tour
Tracking and Mustering

## Card Menu
Card
Card Holder
Access Level
Bulk Card Add
Bulk Card Delete

## System Menu
Operator
Operator Level
Workstation Defaults
System Defaults

## Reports Menu
Reports

## Configuration Menu

| Define | Access Areas |
| --- | --- |
| | Tracking Areas |
| | Control Areas |
| | |
| Device | Device Map |
| | Abstract Device (ADV) |
| | Action Group |
| | |
| Time Management | Time Zone |
| | Schedule |
| | Holiday Group |

Card Holder              Configure AutoCard Lookup
                         Note Field Template
                         Card Holder Tab Layout

Badge                    Configure Badge Printer
                         Badge Layout Utility
                         Badge DLL's

Select Language

Translate                Available Languages
                         Dialogs
                         Menus
                         Other Text

Command File
Guard Tour
Floor Plan Definition

## Window Menu
Arrange Icons

## Help Menu
Help Topics
Northern Computers, Inc.      On the Web
                              E-mail Technical Support

License
About WIN-PAK 2.0

## General Database Access

Each of the WIN-PAK 2.0 databases are accessed through a main database window. It displays a list of records in the database, which can be searched and sorted. Records can be removed from the database by deleting them from the list in the main database window. A detail view opens from the main database window, displaying record details, and also allowing database records to be edited and (in most databases) added.

To close the main database window, click the close button ❌ in the window's upper right corner.
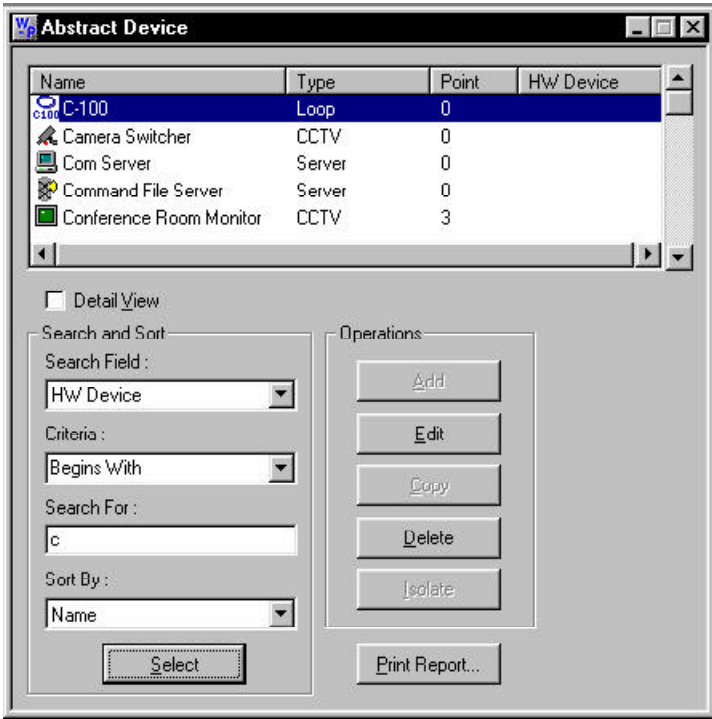


### Search and Sort Fields

Use these fields to choose the search characteristics to be applied to the records list.

- **Search Field:** Select the name of the field you want to search.
- **Criteria:** Choose one of the operators from this

list. The available options vary depending on the database, but include *greater than, equal to*, or *less than.*

- **Search For:** Type in a letter, word, phrase or numeric expression that you want to search for.
- **Sort By**: This selection designates the order in which the search results will be displayed, (e.g. cards can be displayed by card number or last name.)
- **Select:** This button initiates a search based on the information entered in the **Search and Sort** fields

Operations

- **Edit:** Opens the **Edit View** window to the selected record, allowing the record to be changed
- **Add:** Opens a blank **Record View** window for entry of a new record
- **Delete:** Removes the selected record from the database. (In the Card database, a confirmation dialog box appears if the Confirm Card Deletes option is selected in Workstation Defaults. Click **OK** to confirm.)

Copy

Some databases (for example Badge Layouts and Action Groups) have a Copy function. Select a record and click the Copy button to make a duplicate which can be re-named and edited.

Isolate

Some databases (for example Time Zones) have an Isolate function, which is very helpful when you want to delete an item. WIN-PAK 2.0 will not delete an item that is in use. Isolate allows you to view the usage and reassign elements without having to search through all the possible areas where the element might be in use. For example, in order to delete a time zone you must first remove it from any panels, access levels, cards, operators, ADVs or action groups where it is used. Click Isolate, the Modify Usage

(Isolate) window appears. Tabs indicate where the time zone is used and allow it to be removed from each instance. When this process is completed, click **OK** to return to the main database window. Now the time zone can be deleted by selecting it and clicking Delete.

### Print Report

Click the Print Report button to view and print a report on the current database. Generally, a filter dialog box opens first, allowing you to select settings for the report. Select Print Preview to review the report and Print to print it.

## Right-Click Menus

Right-click items in the WIN-PAK 2.0 User Interface to display item specific menus. For example, right-click on a panel on the Device Map to open a menu which allows you to change the panel configure, to isolate it or delete it from the Device Map.

## Database Tree

Several WIN-PAK 2.0 databases use *trees* to display information. The trees allow information to be organized into logical or geographical groups.

The tree can be collapsed so that only the top level information is displayed. By clicking on the plus signs (+), the tree structure can be expanded, a level at a time, to show all branches.

# Programming

The panel configuration contains a great deal of information about the setup of your access control system. This information can be edited by locating the panel on the Device Map, right-clicking the panel and selecting the desired tab. When you have finished editing the information click **Finish** to save your entries, or **Cancel** to exit without saving.

## To Edit a Panel

Panel definitions are added to the **Device Map**.

1    In the **Configuration** menu point to **Device**, and then click **Device Map**.  The Device window appears.

2    Click the plus signs (+) to open branches, until the panel of your choice is displayed.

3    Right-click the panel that you are editing, and then select **Configure**. The Panel Configuration window opens.

4    Select the tab of your choice and then make the desired changes.

5    Click **OK** to save your changes and close the Panel Configuration window. Or click **Cancel** to exit without saving your changes.

---

Note that even when you click cancel some changes are retained. Any ADVs you edited keep their changes and any ADVs you deleted are not restored.

---

## To Add a Time Zone

1    On the **Configuration** manu, point to **Time Management**, and then click **Time Zone**. From the **Time Zone** database window select a time zone and click  **Edit** or click **Add**. The detail

window  becomes active, allowing you to edit an existing time zone or define a time zone.

2    For a new time zone, enter a name and a brief description , then use your mouse to drag the time line to the desired hours.

3    The **Snap Time** option allows you to set the time to snap to increments of 60, 30, 15, or 0 minutes. Selecting 0 minutes allows the time to be set to the minute.

4    Once you have entered a range of time for Monday, you can copy it to the other weekdays by clicking **Copy Monday to Weekdays**. Or you can create the timeline for each day separately.

5    Create a time range for Saturday, Sunday and Holiday (if desired). Whenever a holiday time range is defined, a holiday group must be referenced. This specifies which holidays use this start and end time.

6    Finally, choose the panel type. The N-1000 is the default.

7    Click **OK** to save your time zone. Clicking **Cancel** returns to the main database window without saving your entries.

## To Delete a Time Zone

1    Use the **Isolate** dialog  to change Operators, Panels, Access Levels, Cards, Action Groups and ADVs that use the time zone you are going to delete.

2    In the **Time Zone** database window, highlight the time zone you want to delete, then click **Delete**. If you are sure you want to delete the time zone, click **OK** when the confirmation dialog box prompts you.

**Programming**

## To Add a Time Zone to a Panel

To have the desired effect, a time zone may need to be added to the panels, access levels, ADVs and Action Groups.

1    On the **Configuration** menu, point to **Device**, and then click **Device Map**.  The Device window appears.

3    Click the plus sign (+) to display the panel of your choice.  Right-click the panel that you are editing, click **Configure** and then click the **Time Zone** tab.

3    In the Available Time Zones list (upper pane), double click the time zone to be added. The added time zone(s) appear in the Selected Time Zones list. **Click Apply** before going to the next tab.

4    If the new time zone is to be applied to inputs, outputs, or groups, click on those tabs and select the new time zone from the list of available time zones.

5    When you have completed all changes, click **OK** to save them.

## To Add a Card Holder

1.   On the **Card** menu, click **Card Holder**.  The **Card Holder** window appears.

2.   Click **Add**.  The Card Holder Record window opens to the Name Information tab.

3    Enter the card holders first and last names in the respective fields. ( This is the minimum information required. Add any optional information on the appropriate tabs.)

4    To assign a card to the card holder,  click the **Card Data** tab, and then click **Attach**. The **Select** dialog box appears.

5      Click **Find** to display a list of available cards. If there are no cards available, click **Add** and follow the procedure **To Add A Card**.

6      From the list, select the card that you want to attach to the card holder, and then click **OK**. The selected card is now assigned to the card holder, along with the access level for that card.

7      To Add a Card Holder Photo or Signature**,** click the **Card Biometrics** tab and click the Import or Capture buttons for either photos or signatures..

## To Delete a Card Holder

1      In the Card menu, click **Card Holder**.  The Card Holder window appears.

2      Select the desired card holder.

3      Click **Delete**.

4      You will be prompted to confirm the card delete If the Card Holder is assigned cards, photos and/ or signatures you will also be informed of a **Card Holder Dependency Conflict**. From the dialog box you can choose to either delete the cards and images or detach them from the card holder.

5      When asked to confirm the deletion, click **OK** to delete the card holder or click **Cancel** to retain the card holder.

## To Add a Card

1      On the **Card** menu, click **Card**.  The **Card** window appears.

2      Click **Add**.  The **Card Record** window appears displaying the **Card Properties** tab.

3      In the **Card Number** box, enter the Card Number.

4      Click on the pull-down arrow in the **Access Level** box, and select an access level for the card. Cus-

tom Access Levels can be created. See *Custom Access Levels* in your User Guide for further information.

5       If your system requires a PIN (personal identification number) enter it in the **PIN #1** field. (A PIN can be added to the card later.)

6       Set the card status and select any other options you want.

7       To associated a badge layout with the card, click the **Badge** tab. Click the pull-down arrow in the **Badge Front** and **Badge Back** boxes and select a front and back layout for the Badge.

8       When you have finished defining the card, click **OK** to save it. Or, click **Cancel** to return to the **Card** window without saving the new card.

## To Delete a Card

1       On the Card menu, click **Card**.  The Card window appears.

2       Select the card you want to delete from the card database list.

3       Click **Delete**.

4       If asked to confirm the delete, click **Yes** to delete the card or click **No** to cancel the delete.

---

By default, you will be asked to confirm card deletes. However, this setting can be changed in work station defaults so that cards can be deleted without confirmation. To change this setting, go to the **System** menu, click **Workstation Defaults**, and then select the **Defaults** tab. Select the **Confirm Card Deletes** check box to turn this feature on; deselect it to turn it off.

---

## To Print a Badge

1    In the **Card** menu, click **Card**. The **Card** window appears.

2    From the list of cards, select a card or range of cards, and then click **Print Report**. The **Select Printed Output** window appears.

3    Click **Print Cards**.

---

The Print Badge Preview allows you to view the badges before printing. If you are printing a batch of cards, use the **Next** and **Previous** buttons to scroll through the preview.

---

4    Click **Print**.

## To Add an Access Level

1    In the **Card** menu, click **Access Levels**. The **Access Level** window appears.

2    Click **Add**. The **Define Access Level** window appears.

3    In the **Name** box, enter a name for the Access Level (required). Use up to 30 characters.

4    In the **Description** box, enter a description of the Access Level (optional). Use up to 30 characters.

5    Click **OK**. The new access level is added to the list, but it has no access rights to any entrances. You must now configure the access level.

6    Right-click on an **Access Area** branch, then click **Configure**. The **Configure Area Access** window appears.

7    To allow access to all doors in the area, select **Set Access for all entrance in this area.**

8    Click on the pull-down arrow in the **Time Zone** box, and select a time zone from the list.

**Programming**

9       Click **OK.**

10      In the **Access Level** window, right-click indi-
        vidual entrances on the branch to customize the
        settings as necessary. Continue this procedure
        until the access level has the required configura-
        tion.

---

**Tip** It is easy to tell at a glance what areas are included in a
given access level. Select a level from the list in the left pane.
The branches of the Access Areas are color-coded for the
selected level: red means no access to any doors in the area.
Yellow means access to some entrances in this area. Green
means access to all entrances in this area during the assigned
time zone. Click on a branch to view the entrances which are
also color coded and have a time zone notation.

---

# Operations 

## To Open an Alarm View

1    Click **Alarms** from the **Operations** menu to open the **Alarms** view.

2    You can open multiple alarm views by repeating this procedure.

Colors of incoming messages indicate the type of event. Red indicates an *alarm*, green indicates *normal* and yellow is a *trouble* condition.

Selecting the **Details** check box opens the Alarm Details screen showing details of the state changes indicated by the counter and allowing a note to be written for that alarm.

### Command Buttons

**Ack**: To acknowledge an alarm, select it from the list of incoming alarms and click the **Ack** button.

**Clear**: To clear one or more transactions, select them from the list of acknowledged transactions and click the **Clear** button.

---

If an alarm cannot be cleared, it may be due to a setting in Workstation Defaults that requires an alarm to return to normal before clearing.

---

**Freeze**: To temporarily stop the display of incoming massages, click the **Freeze** button (it changes to **Release**). This stops the screen from scrolling as new information appears. To release the screen, click the **Release** button.

**Close**: To exit the **Alarms** view, click the **Close** button.

**Operation**

### Alarms View Right-Click Menus

Right-click a message in the **Alarms** view and a control menu appears. The list of available commands depends on the type of alarm selected.

### To Add a Note

1      Select an alarm, and then click the **Add Note** button to open the **Add/Edit Operators Note** dialog.

2      Type the message and then click **OK**. These notes are included in history and can be printed with the History report.

## To Open a Floor Plan 

1      Click **Floor Plan** from the **Operations** menu to open the **Open Floor Plan** dialog.

2      Select a floor plan and click the **OK** button. The selected floor plan opens in a separate window, identified by a title bar.

3      To control a devices from the floor plan, right-click an ADV to open the control menu, and then click the command. The commands available depend on the type of object you select.

### To Enlarge or Reduce the Floor Plan View

1.     Right-click in an area of the floor plan (not an ADV), and then click **Zoom**. Select a preset percentage of enlargement or reduction or **Fit in window.**

2.     If you prefer, select custom, and then enter a percentage value. The floor plan is automatically enlarged or reduced within the viewing window.

3.     Once the floor plan has been changed enlarged above 100%, you can right-click the floor plan,

and then click Show View. A smaller window opens inside the floor plan viewing window, showing the location of the enlarged detail on the total floor plan.

## To Open the Control Map

1.     From the **Operations** menu, click **Control Map**. The **Control Map** window opens. Expand the tree by clicking the plus signs to display the devices that you want to control.

2.     Right-click on any device to open its control menu, and then click on the desired command.

**Operation**

# Reports ▨

## To Generate, View and Print a Report

1    On the **Reports** menu,  click **Reports**.

2    From the database record list, select the report
     you want to generate, and then click Report
     Options. A detail window appears. Some reports
     have a variety of filters and sort options. Select the
     options you want.

3    Click **Estim. Pages** to find out the about how
     long the printied report is.

4    After selecting any options, click **Print Preview** to
     view the report.

5    Use the **Zoom** tool to enlarge the page view. Use
     the **Next Page** and **Previous Page** buttons to
     scroll through a multiple page report.

6    To print the report, click **Print**. The Print window
     appears. This is a standard Windows print dialog
     box. Select the printer of your choice, the page
     range, and number of copies. You can make any
     other desired changes to your printer setup.

7    Click **OK** to print the report.