WIN-PAK™ 2005
WIN-PAK™ PRO 2005

Quick Reference Guide

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Revision 00

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Ordering Information

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Feedback

Honeywell Access Systems appreciates your comments about this manual. Please visit us on the web at www.honeywellaccess.com to post your comments.

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Honeywell

Preface

In this preface...

Purpose of this Document

This guide is intended to help with basic installation and day-to-day use of the WIN-PAK 2005 and WIN-PAK PRO 2005 systems. It briefly describes the toolbar buttons and lists the toolbar menus and their commands. References in this guide to “WIN-PAK” refer both to WIN-PAK 2005 and WIN-PAK PRO 2005. When information applies only to one or the other product, this guide uses the specific product name (that is, either WIN-PAK 2005 or WIN-PAK PRO 2005).

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

For additional information on these and other topics, please consult the *WIN-PAK 2005/WIN-PAK PRO 2005 User Guide* (found on the CD) or visit the Honeywell Access System web site at www.honeywellaccess.com.

Audience

This guide is written for two audiences: Chapter 1 is written for the installer of WIN-PAK, and Chapter 2 is written for the individuals using the software to configure a WIN-PAK access control system.

Document Organization

The following table lists and describes this document’s chapters:

Chapter	**Description**
Chapter 1, *Installing WIN-PAK 2005/WIN-PAK PRO 2005*	Lists WIN-PAK hardware and software requirements, installation instructions, and licensing and registration procedure.
Chapter 2, *Using WIN-PAK 2005/WIN-PAK PRO 2005*	Describes the WIN-PAK user interface, Quick Start Wizard, and procedures for programming, operations, and database maintenance.

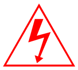
WIN-PAK 2005/WIN-PAK PRO 2005 Documentation

The following documents support WIN-PAK 2005 and WIN-PAK PRO 2005:

- *WIN-PAK 2005/WIN-PAK PRO 2005 User's Guide*, 7-001009, Revision 00.
- *WIN-PAK 2005/WIN-PAK PRO 2005 Quick Reference Guide*, TD0074, Revision 00.

Use of Symbols

The following symbols appear in this guide:



Warning: Shock warnings provide information that you must follow to avoid physical injury by electrical shock.

Caution: Cautions provide information that you must follow to avoid damage to the hardware or software components of the system.

Note: Notes provide important information about a procedure or topic.

Installing the Software 1

In this chapter...

Operating System

WIN-PAK 2005 and WIN-PAK PRO 2005 are 32-bit applications designed to run in a Windows 2000/Windows XP environment.

It is recommended that WIN-PAK 2005 and WIN-PAK PRO 2005 run on a Windows 2000 platform because of the security and stability provided by that operating system. However, WIN-PAK 2005 and WIN-PAK PRO 2005 can run in a mixed environment, where some networked computers are running Windows 2000 and some are running Windows XP. The supported operating systems are: Windows 2003 Server SP1, Windows 2000 Server SP4, Windows 2000 Professional SP4, and Windows XP Professional SP2.

Hardware Requirements

Minimum Requirement Configuration

This setup is sufficient for small systems with one to ten readers, up to 250 cards, and two communication ports. While this is a good configuration for a small standalone system or workstation, it is not sufficient for use as a server:

- Pentium III-1Ghz CPU.
- 256 megabytes of RAM.
- 2.1 gigabyte minimum free hard disk space.
- One serial communication port.
- Tape or CD burner for backups.
- One printer port for reports (two, if badging).
- Two-button mouse 15” SVGA color monitor (1024 x 768, 256 color).
- Microsoft Windows 2000 Professional SP4 or Windows XP Professional SP2.

Recommended Requirement Configuration

This is the recommended hardware configuration for basic access control, including badging, for systems with one to 100 readers, up to 5,000 cards, and up to eight communication ports or IP “Loops.” It can be used for a stand-alone system, a workstation or a server. Additional RAM will improve performance.

- Pentium IV-2.8Ghz CPU.
- 512 megabytes of RAM.
- 40 gigabyte SATA hard disk or 36 gigabyte 10krpm SCSI.
- 2 serial communication ports.
- Tape or DVD burner for backups.
- 1 printer port (2 if badging).
- 17" 1024 x 768 true color monitor.
- 2-button mouse with scroll (PS/2 mouse preferred).
- Microsoft Windows 2000 Professional SP4 or Windows XP Professional SP2 Performance Configuration.

Performance Configuration

This configuration is recommended for systems using more than 16 communication ports or IP “Loops.” It is suitable for systems using up to the system capacity for readers, up to 50,000 cards, and 255 communication ports. It is suitable for a stand-alone system or a server.

- 4 - Xeon, 3.0GHz CPUs.
- 8 gigabytes of RAM.
- 5 - 36 gigabyte 15krpm SCSI hard disk in a RAID 5 configuration.
- Serial communication ports and network card(s) as needed.
- DLT or DAT tape backup.
- 19" 1280 x 1024 true color monitor.
- 2-button mouse with scroll.
- SQL Server 2000.
- Microsoft Windows 2003 Server SP1 or Windows 2000 Server SP4.

System Setup

Standalone Systems

BEFORE installing WIN-PAK 2005 and WIN-PAK PRO 2005 for the first time, ensure that the following conditions are met:

- Install Windows 2003 Server SP1, Windows XP Professional SP2, Windows Server 2000 SP4 or Windows 2000 Professional SP4.
- Disable all energy management from both the BIOS and Operating System, as this can adversely affect the installation and operation of WIN-PAK 2005 and WIN-PAK PRO 2005.
- Install a video capture card or digital camera on the PC that will serve as the badging workstation.
- Install printer drivers.
- Internet Explorer (IE) 5.5 is required for WIN-PAK 2005 and WIN-PAK PRO 2005 to work properly. If an older version than IE 5.50.4522.1800IC is already installed, WIN-PAK 2005 and WIN-PAK PRO 2005 will install IE 5.5.

Note: Some software applications may not function properly on different versions of Internet Explorer.

- Before beginning installation, make a note of the CD Key inside the cover of this manual. You will need this number during installation and when registering the software.
- Read the text files on the software CD and any release notes that are shipped with the software. Additional installation information may be contained therein.
- TCP/IP protocol must be installed for MSDE to work properly. A network card doesn't have to be installed. Use Microsoft Loopback adaptor, depending on the Operating System.

Networked Systems

BEFORE installing WIN-PAK 2005 or WIN-PAK PRO 2005, ensure that conditions listed under Standalone Systems and the following listed conditions are met.

- Install network cards on PCs that are used in a networked system. (Any standard Windows-compatible network card can be used.)
- Ensure that machine names use only alphanumeric

- characters without spaces, and that the first character is always alpha (i.e., standard UNC connections).
- Ensure that networked computers are communicating with one another. The workstations need to be electronically visible to each other. If the computers can communicate, you can ping both ways: client-to- server and vice-versa. Any firewalls, proxies, routers, etc. between workstations could cause problems, unless a clear, unrestricted, permanent path can be established.

Upgrades

WIN-PAK 2005 supports upgrading from NStar or WIN-PAK 2.0 Release 3 or Release 4. WIN-PAK PRO 2005 supports upgrading from NStar, WIN-PAK 2.0 or WIN-PAK PRO Release 3 or Release 4. Before upgrading, make a backup copy of your database files. When prompted by the installation program, DO NOT overwrite your existing database. Also make backup copies of your Floor Plan backgrounds, card holder photos and signatures. If you are upgrading from any WIN-PAK version older than release 3, the database must be sent to Honeywell Access Systems for conversion. If you send in a database for conversion, refer to part number SRVDBUPNC. This will reduce the existing database size, which increases the amount of free space and shortens the upgrade time.

Verify that the amount of free space on the drive where the database exists is either 5 gigbytes or 2.5 times the current size of the WIN-PAK database. When prompted by the installation program, choose "update automatic."

All workstations must also be upgraded. All UIs/Servers must be running the same release build number.

Depending on your OS and network setup, connections between the UI's (workstation(s)) and Server may need to be "re-attached" or the workstation user must be registered on the Server before a UI can connect properly. Peer to Peer (workgroup) Windows XP Professional, as a WIN-PAK server, networking is not supported directly without a domain controller. Peer to Peer (workgroup) networking in a mixed environment (Windows 2000 used as a server and Windows XP as a workstation) is allowed, according to the OS used. Consult the *WIN-PAK 2005/ WIN-PAK PRO 2005 User's Guide* for more information.

WIN-PAK 2005 and WIN-PAK PRO 2005 Installation

Complete Installation

Select Complete installation when setting up a stand-alone system [an access control system installed on one computer], or if you are installing the Database Server for a networked system.

Database Server Only

Select Database Server Only installation when installing on a networked system.

User Interface Only

Select User Interface Only installation when you are installing a workstation on a networked system.

User Interface and Comm Server

Select User Interface and Comm Server installation when you are installing the communication server on a networked system and the PC may also be used as a workstation.

Communication Server Only

Select the Comm Server Only installation when you are installing the communication server on a networked system.

Note: To optimize resources in high use systems, use the System Manager to disable unused system modules (for example, the Guard Tour Server or the Muster Server).

Installation Procedure

WIN-PAK 2005 and WIN-PAK PRO 2005 software is distributed on an autorun CD, along with the CD release notes, and other technical documents. This procedure describes the Complete Installation option. For networked systems, refer to the WIN-PAK 2005/WIN-PAK PRO 2005 User Guide on the software CD or visit the Honeywell Access Systems website at www.honeywellaccess.com.

Note: During installation, you may be asked if you want to overwrite existing files. Keep your existing .dll files. Whenever asked "Do you want to keep this file?", click **Yes** to keep your .dll files.

Depending on the type of computer and operating system, one or more screens displayed in this procedure may or may not appear.

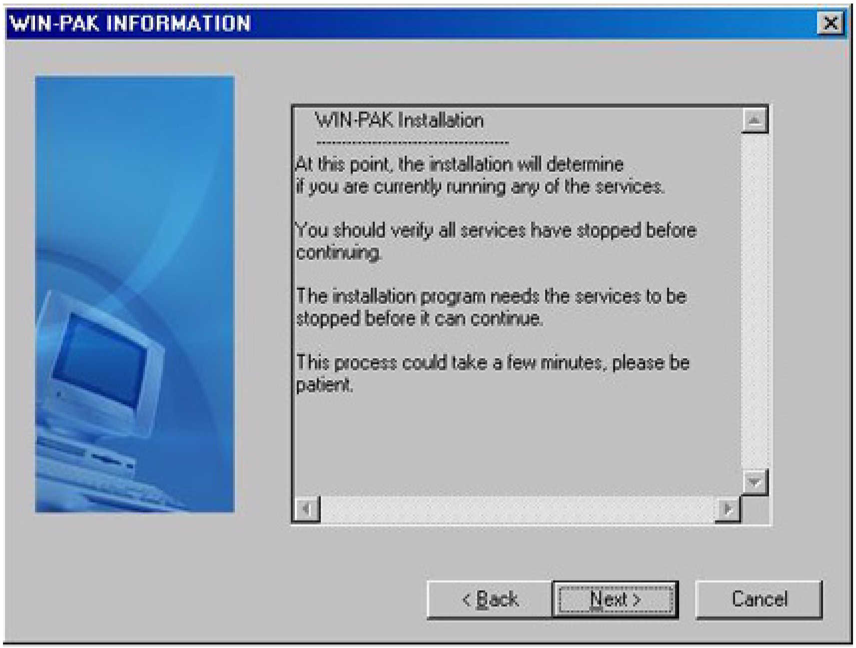
Allow approximately 10-20 minutes for a first-time installation.

1. Exit any Windows programs that may be running. Insert the software CD into the CD drive. An installation browser opens. If the browser does not open, run the **Launch.exe** file from the CD. The first installation screen appears. Navigate through the initial installation screens and select **Install Software**.

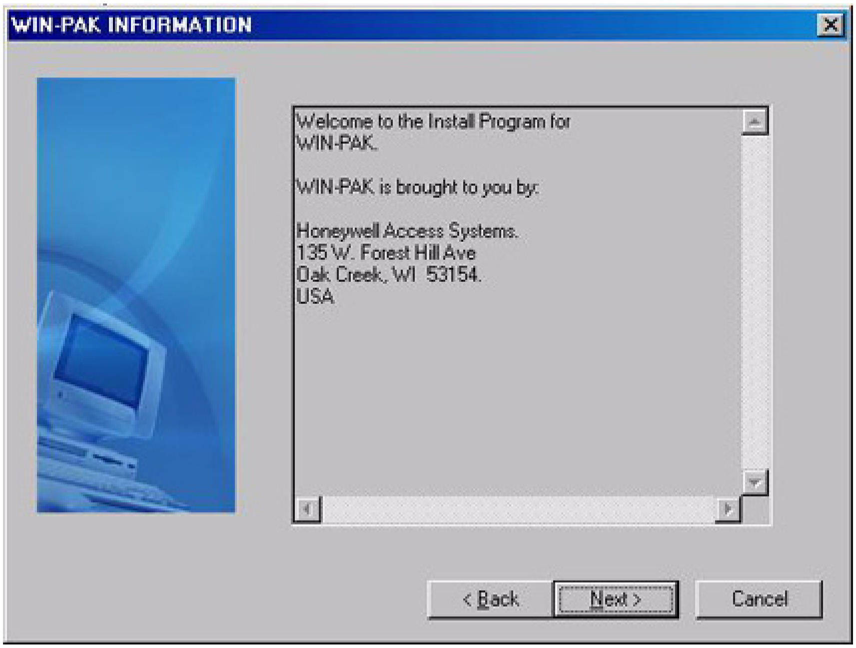
   If an older version than Internet Explorer 5.50.4522.1800IC is installed, the program will prompt the operator to upgrade. Click **Yes**, to upgrade. If the correct version of IE is detected, the first Welcome screen will appear.

   Note: If Internet Explorer 5.5 is installed, the computer will be rebooted after its installation and the WIN-PAK installation procedure will resume.

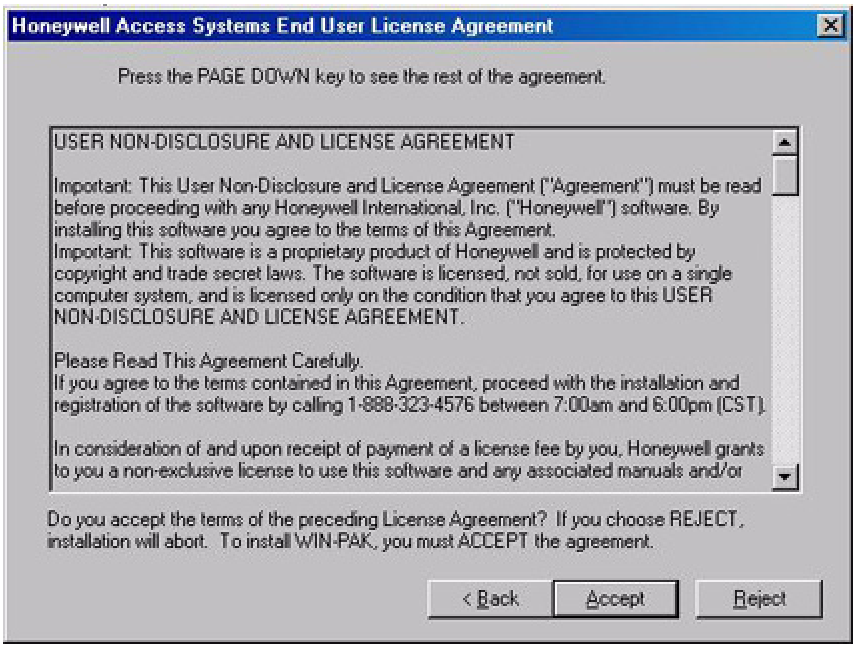
2. Click **Next** to advance to the next screen in the setup process. The Information screen is displayed while the program verifies that all the services are stopped.



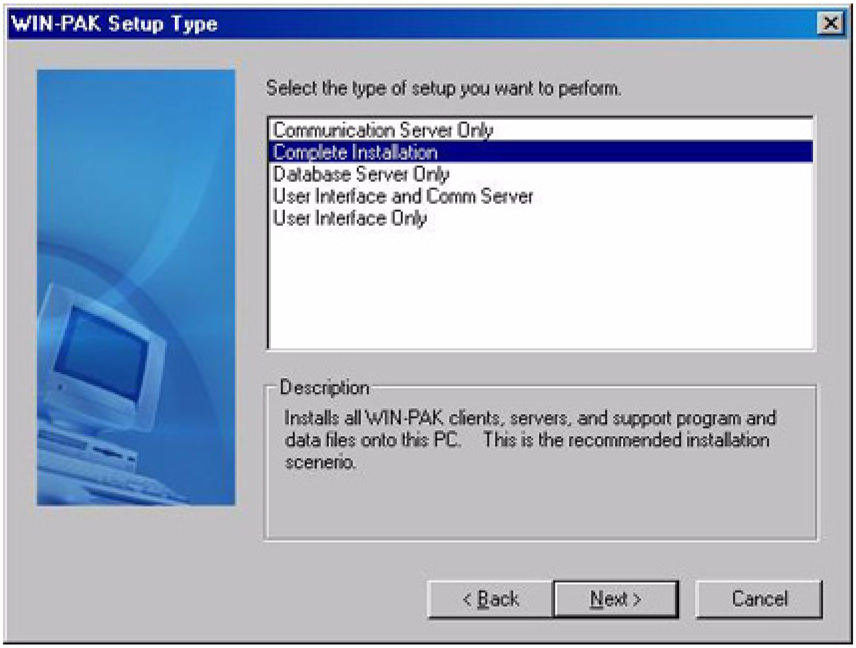
3. Click **Next** to continue installation. The second Welcome screen will be displayed:



4. Click **Next** and the User License Agreement window is displayed (next illustration).

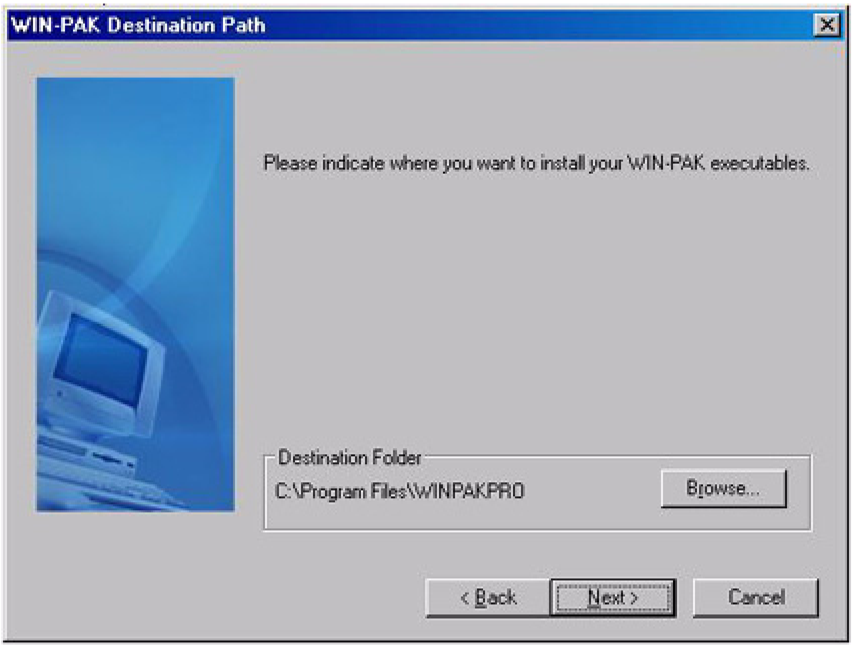


5. Click **Accept** to acknowledge that you understand and agree to the terms. The Setup Type screen will appear (next illustration), from which the operator can select the type of setup (or installation) desired.

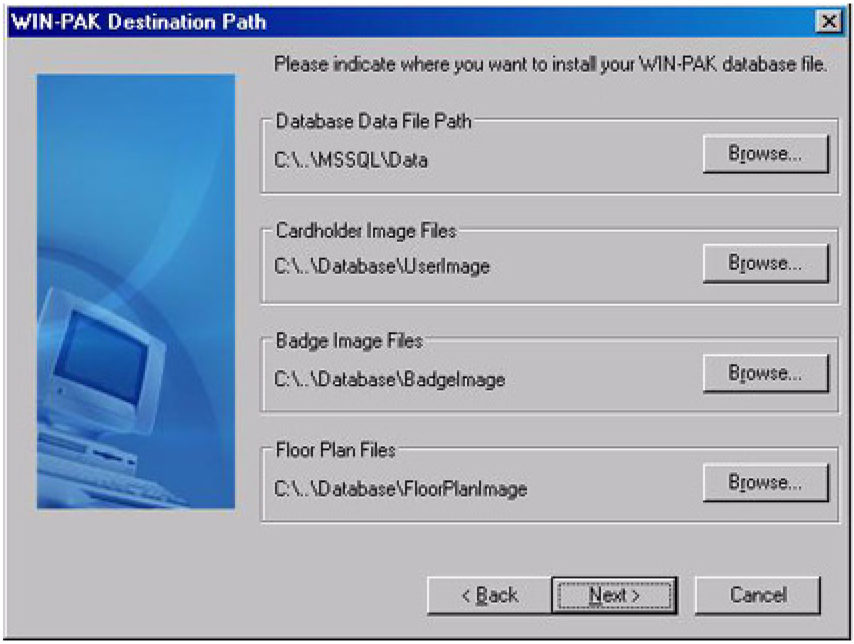


6. Select the type of installation desired, then click **Next** to continue. For the purpose of illustrating a complete installation, this procedure assumes the Complete Installation option is selected. The Destination Location screen will appear (next illustration).

   Note: For installations other than the Complete Installation, refer to the *WIN-PAK 2005/WIN-PAK PRO 2005 User Guide* located on the CD or visit the Honeywell Access System web site at www.honeywellaccess.com to download an electronic copy.



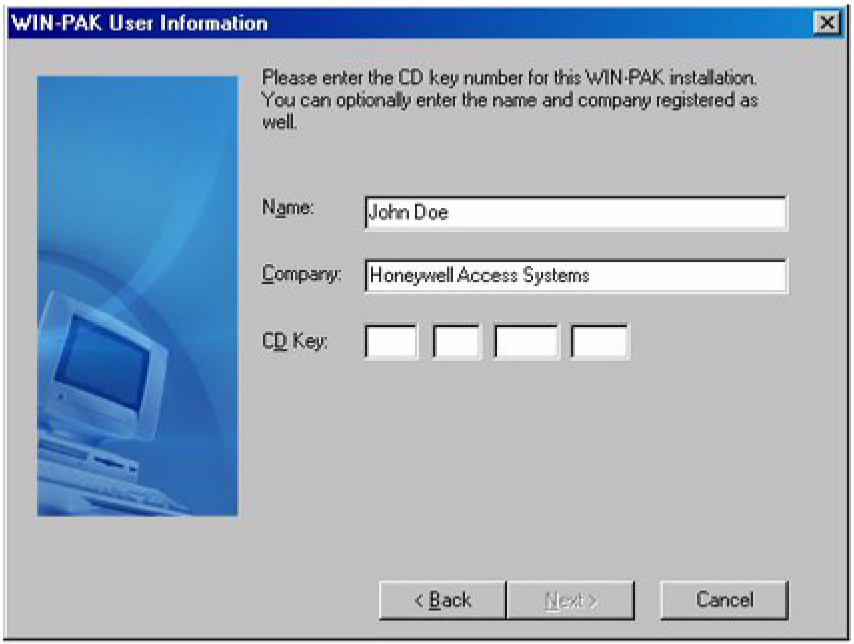
7. Click **Next** to accept the default location or click **Browse** and specify a different location.



8. Click **Next** to accept the default locations for the database, cardholder image, badge image and floorplan image, or click **Browse** and specify a different location.

Notes:

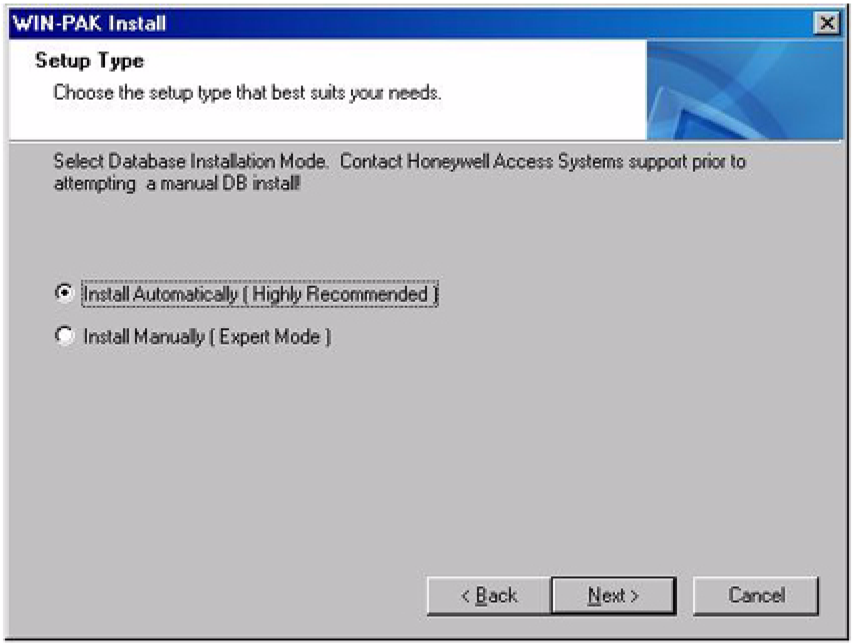
- In certain applications it may be preferable to place the database files on a different drive partition to protect them from operating system failure. Refer to the "Limits and Capacities" section of the *WIN-PAK 2005/WIN-PAK PRO 2005 User Guide*.
- It is recommended to install the database file on the same computer as the database server in order to benefit from the WIN-PAK backup and restore utility.



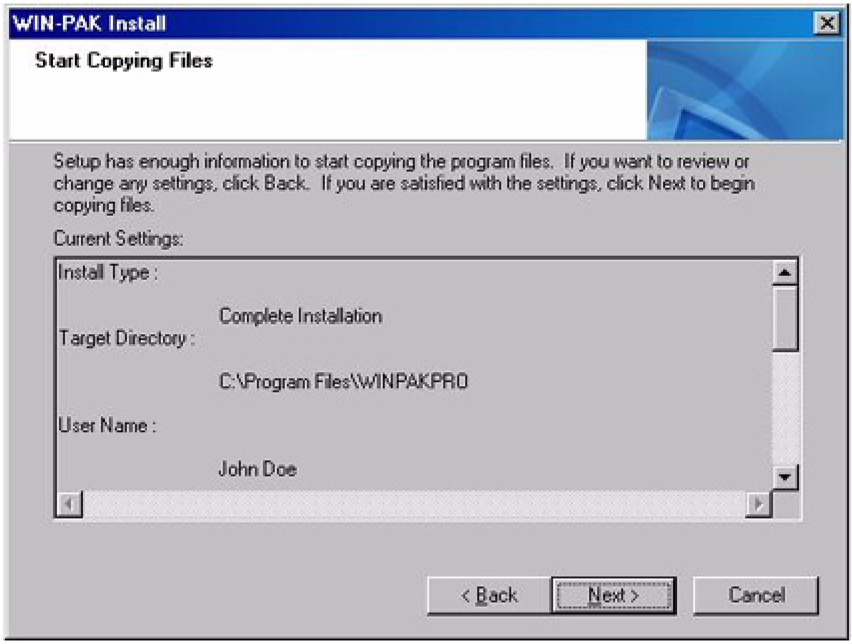
9. Fill in the User Information, then click **Next** to continue. The Name and CD Key fields must be filled in. The Company field is optional. The CD Key number is located on the inside front cover of this manual.

10. A popup indicating the CD key number validation will appear. If the number was entered correctly, select **OK** to continue or re-enter the number if required.

Note: Unless you are a software expert, it is highly recommended to choose the automatic installation option.



11. Select the database installation mode. Then click **Next** to continue.
12. Click **Yes** to continue the installation.
13. Enough information has been gathered to begin the installation process. You may wish to review the information before proceeding by scrolling through the information. Click **OK** to continue.



14. After the installation is complete, the Setup Complete window appears. Click **Finish** to complete the installation process.

First Login

Click the WIN-PAK User Interface icon. The user interface opens and the Connect to Server window appears:

Enter **Admin** as the default operator Name.

Notes:

- When logging in on a server for the first time under administrative privileges, the Quick-Start Wizard will be initiated. Refer to the "Quick-Start Wizard" section.
- No password is required for the initial log in, but you should add a password in order to insure the security of your system.

Licensing and Registration

WIN-PAK has a demo mode of operation with no expiration time.

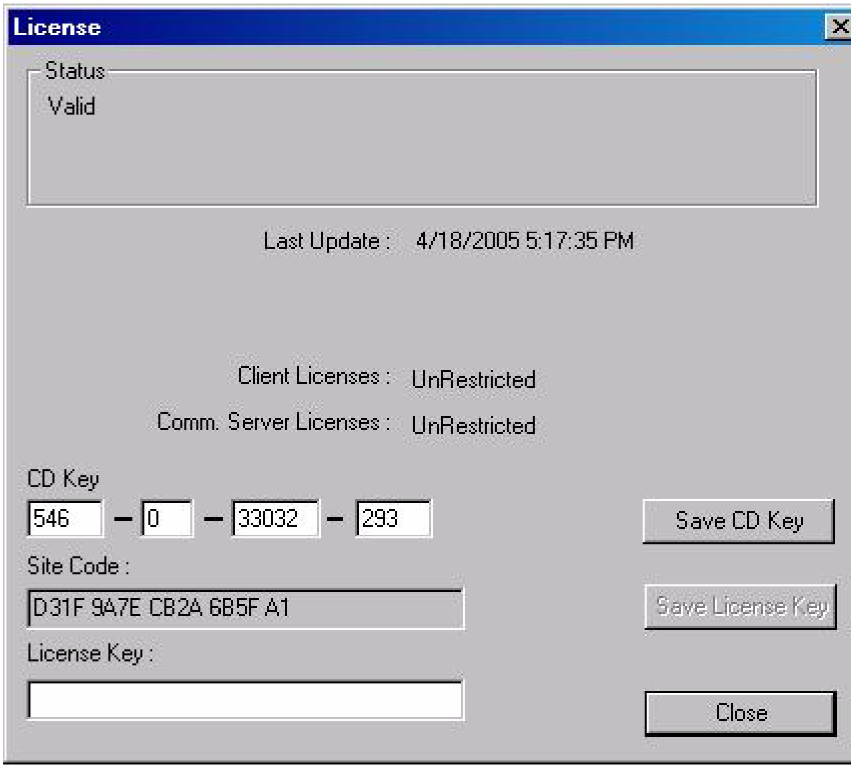
For evaluation purposes, the software can be installed and used with the following restrictions: 10 card number database; no bulk card add functions; no badge printing (preview allowed). A Demo mode "notice" will be displayed imediately after you login, in the Quick Start Wizard, and if you enter in more than 10 cards or print an ID badge. To remove the demo mode of operation the software must be registered.

WIN-PAK software has a CD Key found inside the cover of the user guide. Make a note of this number.

Registering Software

Before beginning software registration, select the License option from the WIN-PAK Help menu.

When the License window is displayed, note the CD Key and Site Code numbers. These are unique numbers that identify your computer and how many clients will be authorized when registered.



Registering Software Online

You can register your WIN-PAK software 24 hours a day 7 days a week by visiting the Honeywell Access Systems web site at www.honeywellaccess.com

Or, select Registration from the Honeywell Access Systems option on the WIN-PAK Help menu. Internet Explorer will open at the registration site.

License Files

The encryption software writes files to your hard drive as part of the licensing. You must take care not to move or damage these files, or your license will be invalidated and you will not be able to access your system.

Notes:

- The license files cannot be moved. There is no License Transfer utility.
- It is recommended that you obtain a WIN-PAK hardware key (consult your Honeywell Access System representative for the appropriate part number based on your system requirements) for multi-drive RAID configuration computers to avoid licensing problems if one of the drives needs to be replaced.

Norton Speed Disk Utility

Caution: Using Norton Speed Disk can invalidate your license. Do Not use Norton Speed Disk before making changes to the utility indicated below.

Speed Disk is the defragmentation utility included in Symantec's Norton Utilities. To prevent loosing license files:

1. Open Speed Disk and select Options/Customize, and then Unmovable Files from the File menu.
2. Specify that the *.ent, *.key, and *.rst files cannot be moved.
3. Save the new profile by selecting Files/Options/ Optimization/ Save. Speed Disk can now be run without affecting license files.

Using the Software

2

In this chapter...

User Interface

The WIN-PAK 2005/WIN-PAK PRO 2005 user interface allows you to set up, monitor, and maintain all aspects of your access control system.

Title Bar and Menu Bar

Once a user is logged in, the title bar at the top of the screen displays the name of the Account and operator name. Account 1 is the default account and is the only Account allowed for WIN-PAK 2005.

Toolbar Buttons

Log In: Logs the user out of WIN-PAK 2005 or WIN-PAK PRO 2005 and reopens the log-in window, allowing the user to log in again and reconnect to the database server.

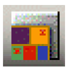
Select Account: Calls the Account Select window and allows you to select the account for WIN-PAK PRO 2005. WIN-PAK 2005 allows only one account. Selecting All Accounts will allow you to edit the account and add email addresses for report generation.

Dynamic Alarm View and Acknowledge: Opens the Alarm View window, from which incoming alarms can be viewed, acknowledged and cleared.

View Events: Opens the Event View window, which displays current system activity in real time.

Control Map: Opens the Control Map window for operator control of devices. Also provides an alternate means of acknowledging and clearing alarms.

Run Command File: Calls up the Run Command File dialog box, allowing the user to run text files containing device instructions stored in the Command Files database.



Open Floor Plan: Opens the Floor Plan database dialog box, allowing the user to select and open floor plans.

Locate Last Card Holder / Card Holder Transaction: Opens the Locate Card Holder 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: Opens the main Card database window, allowing the user to search and sort the card list and to add, edit or delete cards.

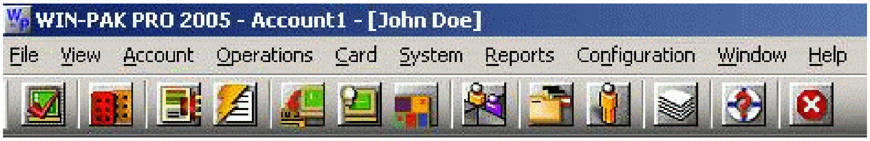
Card Holder: Opens the Card Holder Database window, allowing the user to search and sort the cardholder list and to add, edit or delete card holders.

Run Reports: Opens the Reports database window, allowing the user to generate, view and print reports.

Help Topics: Opens the Help menu, providing access to the on-line help files.

Log Out: Logs the user out of the user interface and logs the client out of all servers.

Menus



File Menu

- Log In
- Log Out
- Configure Badge Printer
- Reports
- Workstation Defaults
- System Defaults
- Database Maintenance
- Database Limits/Capacities
- Exit

View Menu

- Select Language
- Toolbar
- Status Bar

Account Menu

- Select
- Edit
- Configure
    - Badge Layout Utility
    - Card Holder Tab Layout
    - Note Field Template

Operations Menu

Locate
System Events
Events
Alarms
AutoCard Lookup
Live Monitor
Floor Plan
Control Map
Command File
Guard Tour
Tracking and Mustering
Digital Video

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
Report Templates

Configuration Menu

- Define
  - Access Areas
  - Tracking Areas
  - Control Areas
- Device
  - Device Map
  - Abstract Device (ADV)
  - Action Group
- Time Management
  - Time Zone
  - Schedule
  - Holiday
  - Daylight Saving Group
- Quick-Start Wizard

- 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
- Reports
- Control Map

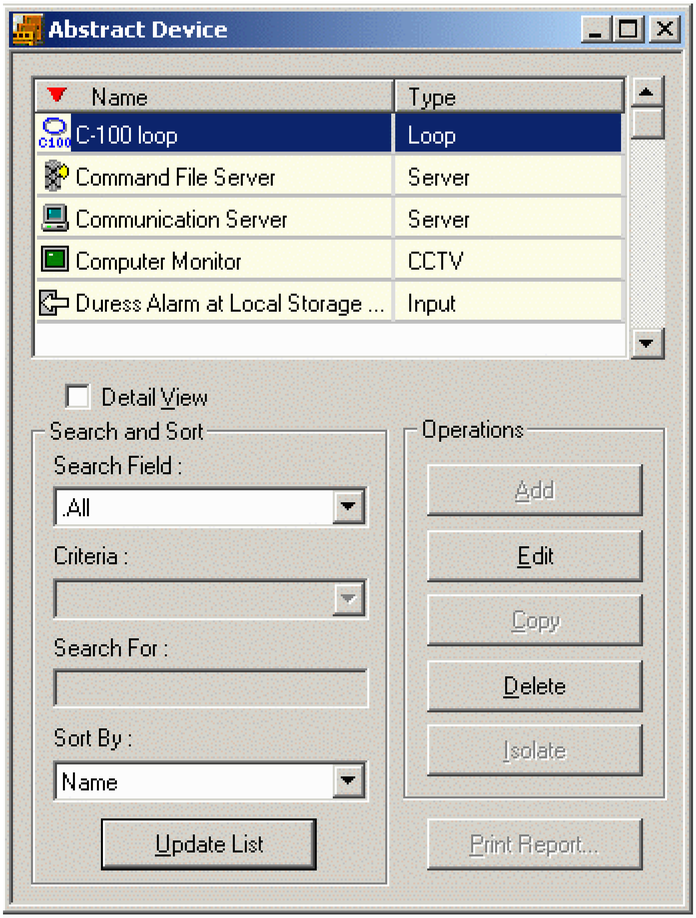
Help Menu

- Help Topics
- Honeywell Access Systems
- On the Web
- Contacts
- Registration
- License
- About WIN-PAK

General Database Access

Each of the WIN-PAK 2005/WIN-PAK PRO 2005 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. For example, cards can be displayed by card number or last name.

Update List – 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 (e.g., Badge Layouts and Action Groups) have a Copy function. Select a record and click the **Copy** button to make a duplicate which can be renamed and edited.

Isolate – Some databases (e.g., Time Zones) have an Isolate function, which expedites item deletion. WIN-PAK 2005 and WIN-PAK PRO 2005 do not permit an item (e.g., a time zone) to be deleted, unless it is first removed from all areas (panels, access levels, cards, etc.) where it is implemented. The Isolate function allows the operator to view and edit all areas where an item is implemented without having to manually access each area where the item may be implemented. Selecting an item and clicking **Isolate** brings up the Isolate window, which provides access, via tabs, to all areas where the selected item is implemented. After the item is removed from each area, clicking **OK** at the bottom of the window returns the operator to the main database window, from which the item can now be removed.

Print Report

Click the **Print Report** button to view and print or export 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 the report or **Export** to create a delimited text file of the report.

Right-Click Menus

Right-clicking on items in the User Interface to display item specific menus. For example, right-clicking on a panel icon in the Device Map window opens a menu which allows the operator to change the panel configuration or to isolate or delete it from the Device Map.

Database Tree

Several WIN-PAK 2005/WIN-PAK PRO 2005 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, one level at a time, to show all branches.

Quick-Start Wizard

Overview

After logging in to WIN-PAK for the first time on the communication server, the Quick Start Wizard window will appear. The communication server is on a standalone computer where a complete installation has been performed or in a networked system, it is generally located on the WIN-PAK database server.

Since the wizard requires access to the WIN-PAK database, it is only available to operators with administrator permissions. The wizard can be set to not appear at each log in. The administrator can also launch the wizard from the configuration menu.

The function of the Quick Start Wizard is to provide a simple method using general system defaults along with user-defined fields to create a basic functional system.

Information is provided at each step to guide the administrator through the process. Account(s), time zones, site(s), communication "loops" (direct, TCP/IP or dial-up), cards, panels and readers can be added using the wizard. The cards are given a default permission to be valid at all times and for all readers in the system. Changes to the cards can be made at the operator's convenience.

When you are done using the wizard, click **Finish** and initialize the panels. To initialize the panel(s) click on Operations, Control Map and click on the + by Quick Start Control Area to open up the branch. Right click the panel that was added and select **Initialize**. Select **All** and click **OK**. A panel initialization status window will display the initialization progress. Repeat the procedure for as many panels as were added to the system. Multiple panels can be initialized at the same time on an RS-485, RS-232 or TCP/IP line. If C-100 is being used, initialize one panel at a time.

If this is the first time the wizard was run and there were no previously defined communication ports, then the communication server needs to be restarted. Restart the communication server from the WIN-PAK Service Manager (located on the desktop or Start=>All Programs=>Honeywell Access Systems=>WIN-PAK Service Manger). An error indicating that the communication server is not responding will appear [if the WIN-PAK User Interface is open]. Click **OK**. When the communication server is started, another message will appear several seconds later indicating that it is now working. All other additions made by the wizard will become available immediately after the wizard is finished.

It is normal to receive alarm activities from the panel during the beginning of the initialization process. These alarms will be displayed on the Alarm View window. To acknowledge the alarms, click the first event and then hold the shift key down and select the last event. [You may use the scroll bars to reach the end of the list.] Then click **Ack**, which will acknowledge the alarms. Use the same process to select the acknowledged alarms, then click **Clear** to clear the alarms.

Your system is now operational. Refer to the rest of this manual to learn how to further customize your system.

Procedure

Quick Start Wizard (QSW) steps the user through setting up a basic configuration of WIN-PAK. To use the Wizard, simply follow the prompts indicated on the screens.

The initial screen is brought up automatically after logging in with administrative privileges. Several areas will be grayed, depending upon the mode of operation (Demo / WIN-PAK 2005 vs. WIN-PAK PRO 2005) or whether the next step has enough information to allow you to go to the next screen. For example, you are not allowed to Add New Readers to existing P-Series Panel if the panel has not been created yet.

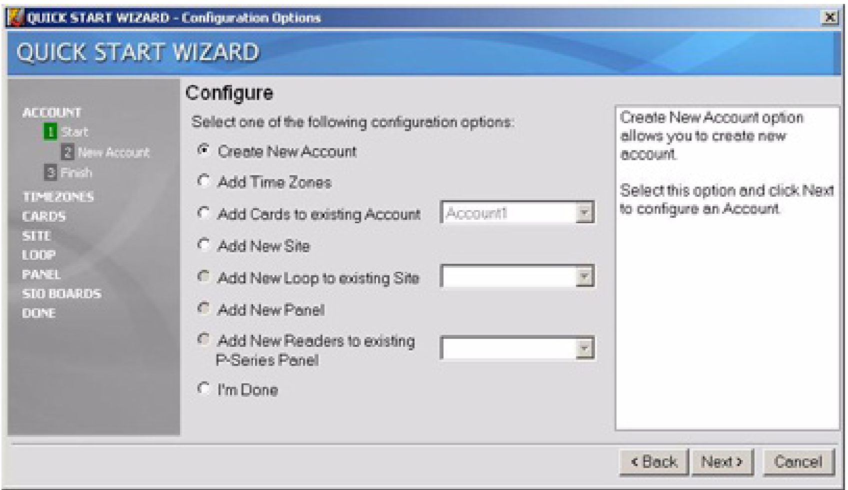
The following screen shots will not show the "Demo" settings as the software has been registered to show all available functions.

1. When you press **Next**, QSW prompts you to select the option for configuration. Note that QSW lets you perform only the most basic operations. For the more complex tasks, such as setting up a Guard Tour or Tracking/Muster areas, configuring card access level, etc., use WIN-PAK directly.

   Any settings configured by QSW can be changed using the core program after the wizard is finished. Press the F1 function key for Help or refer to the manual for details.

   QSW provides a list of options that helps you to configure data to create a new account, add time zone to accounts, add cards to accounts, add new site, add new loop to existing sites, add new panel to existing loop, and add new readers to existing P-Series panel.

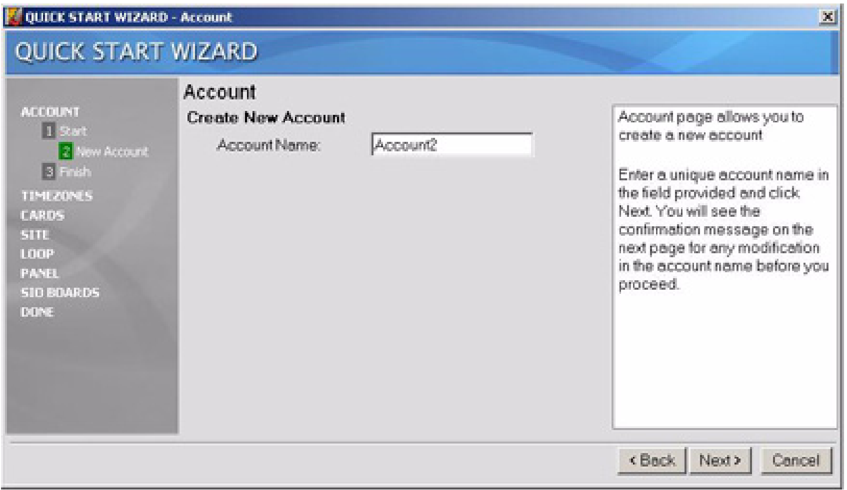
   Note: Follow through the steps in QSW to configure options in a sequential order, as listed in the Configure dialog box. However, you can select any option at any time and configure accordingly.



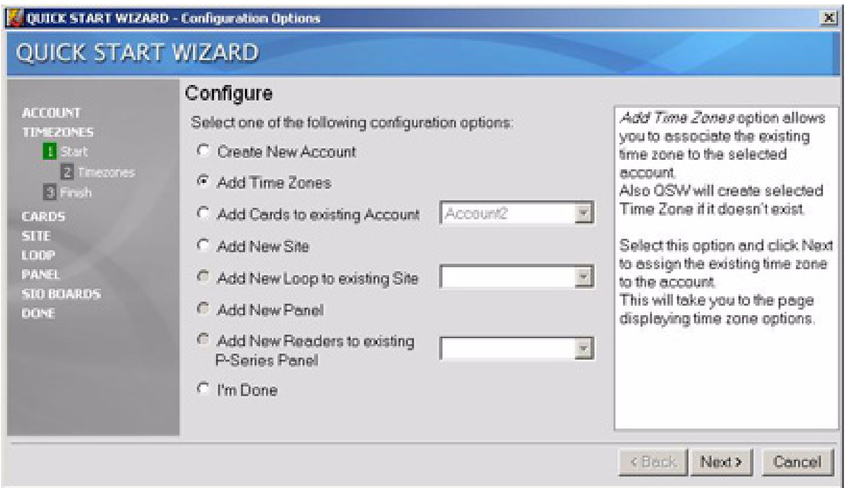
2. Create a new account. By default, the “Create New Account” option is selected on the Configure page at the beginning. Select this option to create a new account and click **Next**. This will take you to the Account dialog box to specify the account name.

   The account page allows you to create a new account for the user group to which you can add cards and card holders. Enter a unique account name in the field provided and click **Next**. You will see the confirmation message on the next window for any modification in the account name before you proceed.

Note: The account name must be unique as the application does not allow any duplicate account names.

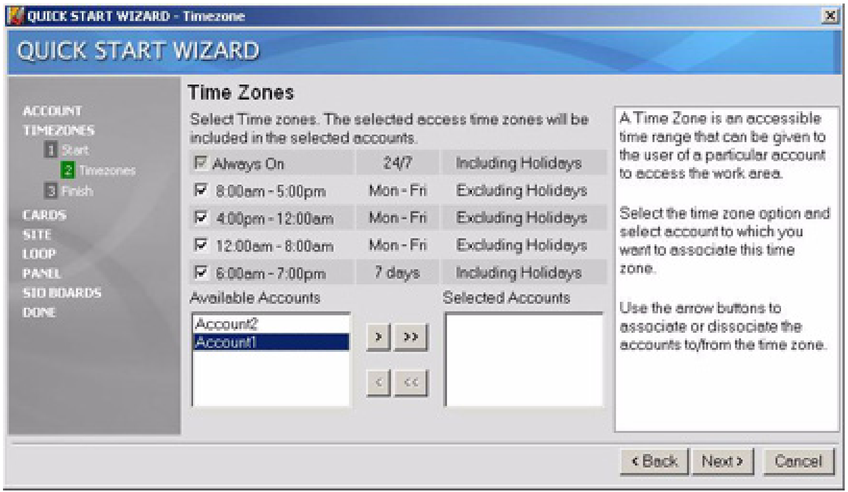


3. Click **Next** to continue further. This will take you to the Configure dialog box with the “Add Time Zones” option selected for time zone configuration.



The Add Time Zones option allows you to create the time zones and associate them to the selected account. A time zone is a defined period of time that can be applied to a door to have a door un-locked or applied to a card indicating when a person can use the card to gain access.

4. Select the Add Time Zones option and click **Next** to create and assign the time zone to the account.



The Time Zones dialog box displays the time zones that may currently exist in the database. It is an accessible time range that can be given to the user of a particular account to access the work area/location/site.

Select the time zone option and account to which you want to associate this time zone. The selected time zones that do not already exist in the database are added.

The Available Accounts list shows all the existing accounts in the database. The Selected Accounts list shows the accounts that you have chosen to associate the time zone.

Use the arrow buttons to associate or dissociate the accounts to or from the time zone.

Note: To add a new time zone, use **Configuration > Time Management > Time Zone** option in WIN-PAK.

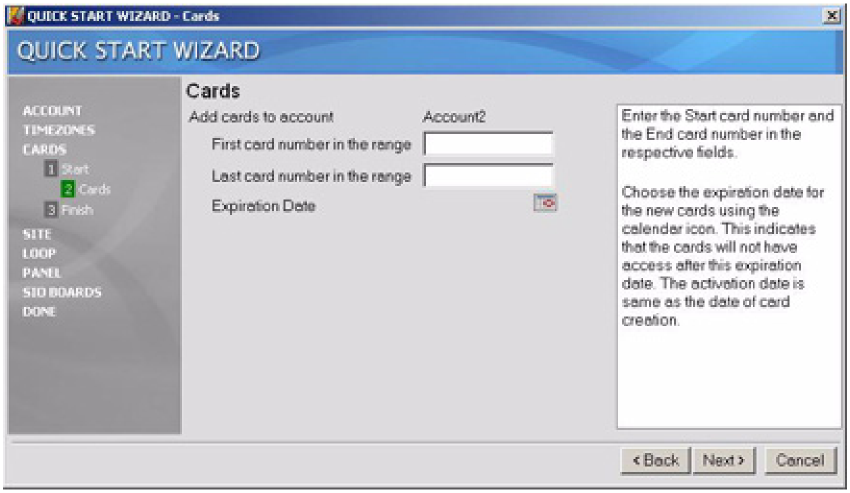
5. Click **Next**. You will see the confirmation message on the next dialog box for any modification in the time zone before you proceed.

6. Click **Next** to continue. This takes you to the Configure dialog box with the "Add Cards to Exiting Account" option selected for adding cards.

Adding Cards to an Existing Account

The Add Cards to Existing Account option allows you to add cards to the selected account.

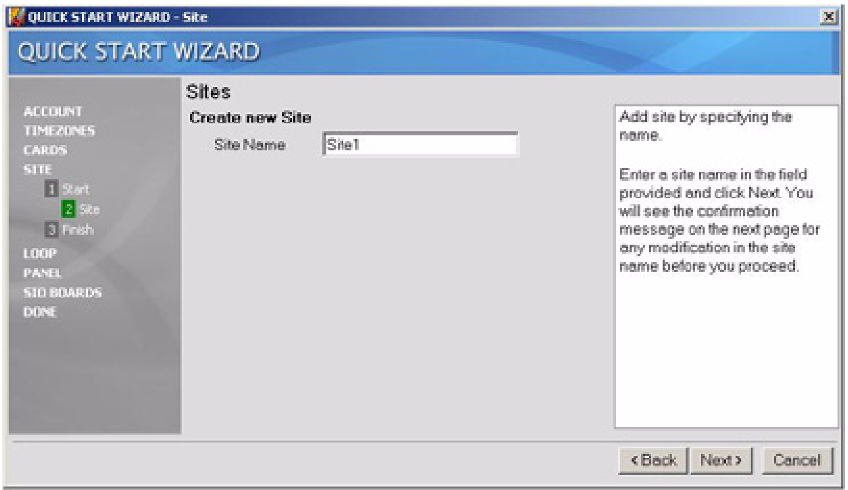
1. Select this option and select the account from the existing list.
2. Click **Next**. This takes you to the Cards dialog box to configure cards.



3. Add cards by specifying the card number and the expiration date. Enter the first card number and the last card number in numerical order (1 to 10) in their respective fields. To add a single card, specify the same card number in both fields (1 to 1).
4. Choose the Expiration Date for the new cards using the calendar icon. The selected date is displayed against the Expiration Date. This indicates that the card will not have access after the expiration date.

   Note: The activation date is the date the card was created.
5. Click **Next**. You will see the confirmation message on the next page for any modification in the card configuration before you proceed.
6. Click **Next** to continue. This will take you to the Configure dialog box with the "Add New Site" option selected for adding sites.

Adding a New Site



A site is a logical categorization for associating the panel and for providing access. The site appears as a folder in the control map.

The Add New Site option allows you to add a new site to which you can associate loops.

1. Select this option and click **Next** to configure a site that will have multiple access areas.
2. Add a site by specifying the name. Enter a unique site name in the field provided and click **Next**. You will see the confirmation message on the next dialog box for any modification in the site name before you proceed.
3. Click **Next** to continue. This takes you to the Configure dialog box with the “Add New Loop to Existing Site” option selected for adding loops to the site.

Adding a New Loop to an Existing Site

“Loop” refers to the communication method that is used to communicate between the workstation and the panel.

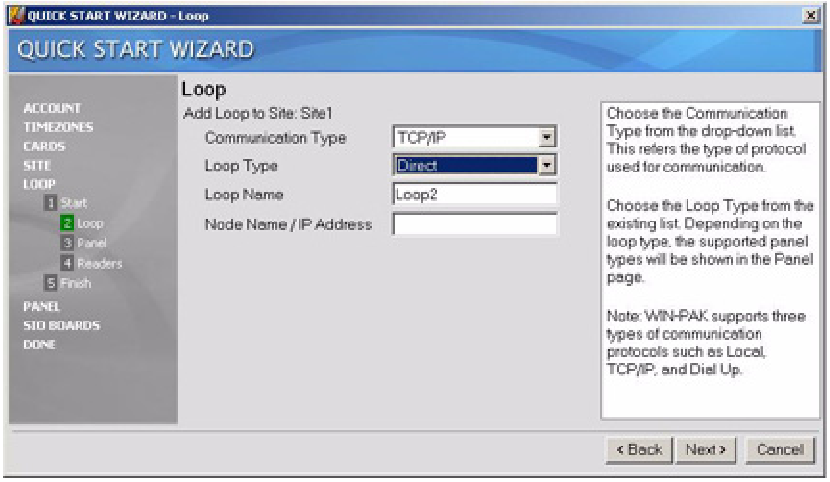
The Add New Loop to Existing Site option allows you to add loops to an existing site.

1. Select this option and select the site from the drop-down list.
2. Click **Next** to configure the Loop details.
3. Select the Communication Type from the drop-down list of communication protocols.
4. Select the Loop Type from the list. Depending upon the loop type, the supported panel types will be shown in the Panel dialog box.

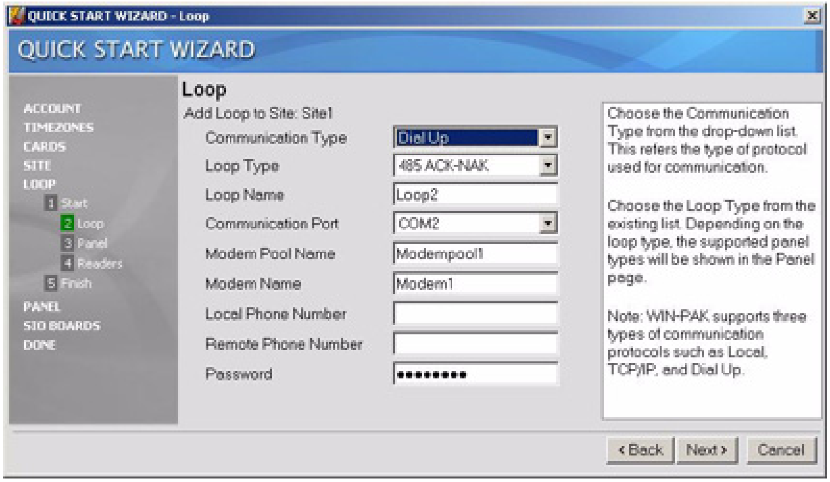
5. Enter the Loop Name in the name field.
6. Select the Communication Port.

   WIN-PAK supports three types of communication protocols: Local, TCP/IP, and Dial-Up. The loop configuration differs according to the protocol type you select. Each protocol requires the following in addition to the configuration above:

   - Local – Select the COM port.
   - TCP/IP – Enter the IP address of the communication loop.

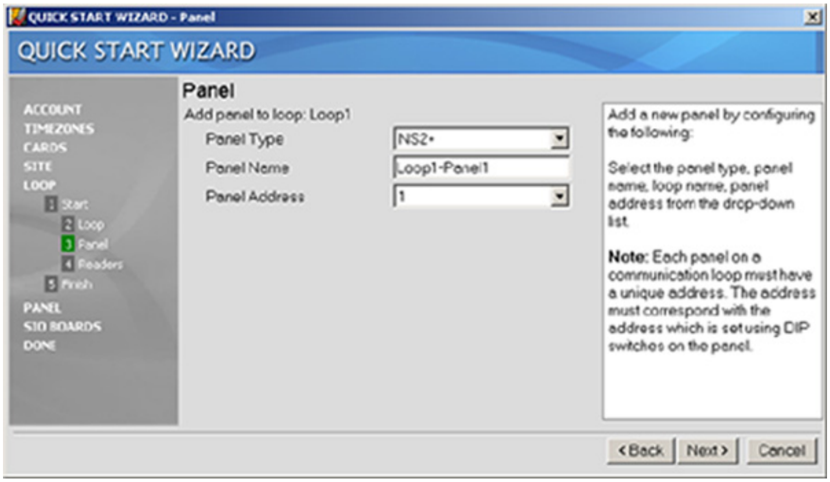


   - Dial-Up – Specify the following in addition to the above configuration:
     - COM for the communications port.
     - Modem Pool name.
     - Modem name.
     - Local Phone number.
     - Remote Phone number.



Specify the password. The password can contain up to 20 alphanumeric characters and it is used between the remote location and WIN-PAK computer to maintain security.

7. Click **Next** to display the Panel dialog box. The Add Panel option allows you to add a new panel to the database.



8. Choose the panel type from the drop-down list. WIN-PAK supports four types of panels such as the N-1000/PW-2000 series, P-Series, and NS2+ panels that can communicate with the application.

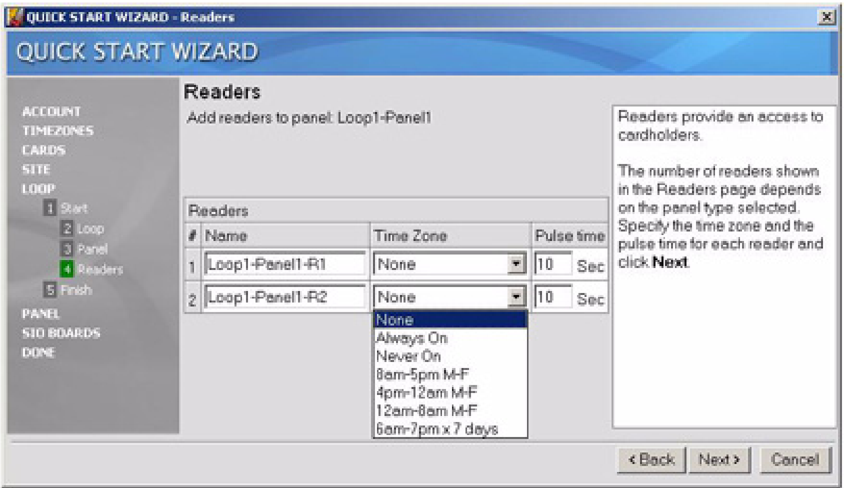
9. Enter the panel name in the appropriate field.

10. Select the panel address from the drop-down list.

    Note: A single panel can contain one or more readers, depending on the panel type.

11. Click **Next** to configure the readers to the panel selected.

    Readers that are fixed or placed on the doors provide access to card holders. The number of readers shown in the Readers dialog box depends on the panel type selected.



12. Specify the time zone that the door will be unlocked. If the door should remain locked at all times, select **None** as the Time Zone.

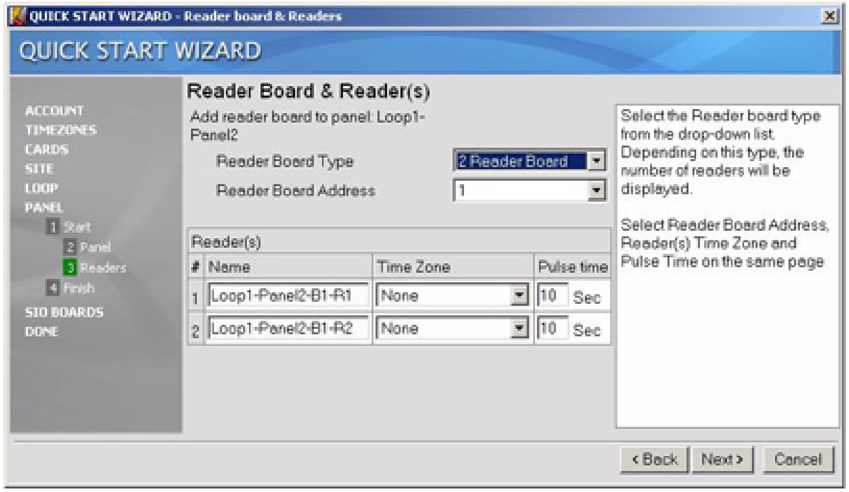
13. Specify the pulse time for each reader. The pulse time is the time in seconds that the door momentarily unlocks after a valid card is read or when a request to exit has been granted. Click **Next**.

14. Click **Next** to continue. This takes you to the Configure dialog box.

Adding New Readers to an Existing P-Series Panel

The Add New Readers to Existing P-Series Panel option allows you to add a new reader to the P-Series panel. This option is enabled only if any P-Series panel has been added in the database.

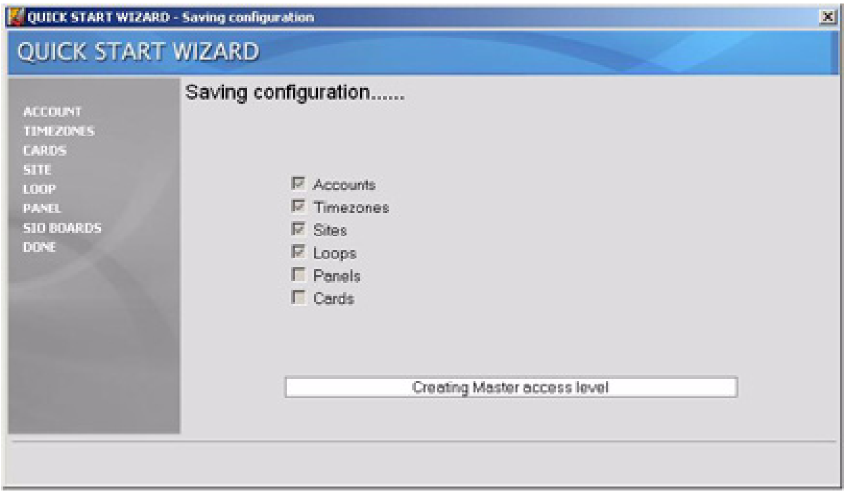
1. Select this option and select the panel from the drop-down list.
2. Click **Next** to configure readers to the existing P-Series panel.



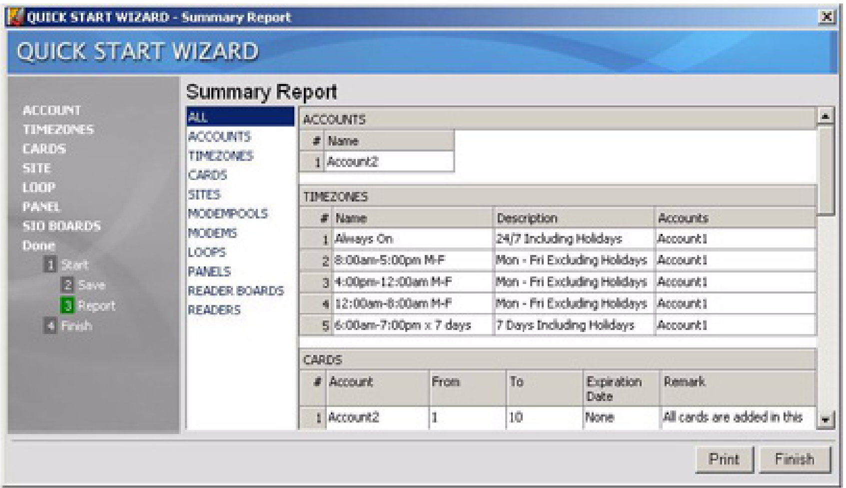
3. Select the Reader board type from the drop-down list. Depending on the reader type, the number of readers appears.
4. Select the Reader Board Address.
5. Specify the time zone that the door will be unlocked. If the door should remain locked at all times, select **None** as the Time Zone.
6. Specify the pulse time for each reader. The pulse time is the time in seconds that the door momentarily unlocks after a valid card is read or when a request to exit has been granted.
7. Click **Next** to continue. This takes you to the Configure dialog box.

I'm Done

1. Select "I'm Done" after you complete the required configuration in the Quick Start Wizard. The Saving Configuration dialog box appears:



This action saves all the current configuration and displays the Summary Report:



2. From the Summary Report, click **Print** to print the configuration details, or click **Finish** to close the Quick Start Wizard dialog box.

Programming

To Edit a Panel

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, clicking **Configure**, and selecting the desired tab. When you have finished editing the information click **Finish** to save your entries, or **Cancel** to exit without saving.

Follow this procedure to edit a panel record that is configured on the Device Map:

1. In the Configuration menu, click **Device > 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 click **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: 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 menu, click **Time Management > 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 time range for Monday, you can copy it to the other weekdays by clicking **Copy Monday to Weekdays**. Or you can create the time range for each day separately.
5. Create a time range for Saturday, Sunday and Holidays (if desired).

   Note: The H2 (Holiday type 2) is for the NS2+ panel only.
6. WIN-PAK PRO 2005 requires that a newly created time zone definition be applied to at least one Account. Click on the Account tab and Add the appropriate Account(s) to Selected Accounts. This step is not needed for WIN-PAK 2005.
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 remove 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.

To Add a Time Zone to a Panel

1. On the Configuration menu, click **Device > Device Map**. The Device window appears.
2. 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, double-click the time zone to be added. The added time zone(s) appear in the Selected Time Zones list.
4. If the new time zone is to be applied to inputs, outputs, or groups, click those tabs and select the new time zone from the list of selected time zones.
5. When you have completed all changes, click **OK** to save them. If new time zones have been added, you must fully initialize the panel for the time zone programing to take effect.

To Add a Card Holder

1. Select Account from the Menu for the name of the account to which you want to add a Card Holder (not required for WIN-PAK 2005). Click **Card** > **Card Holder**. The Card Holder dialog box 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 **Card Biometrics** > **New** (bottom of window). Enter the card number and press **Enter**. Select the Access Level from the drop down list and click **OK**.
5. To Add a Card Holder Photo, click **Capture** if you are using a "live" camera or import for digital file transfer. After capturing the image, crop the image and click **OK**. For Signatures, select **Signature** from the Frame Selected drop box and **Capture**. Click **Print Badge** to print the selected Badge or click **OK** to save and continue.

To Delete a Card Holder

1. Select **Account** from the menu for the name of the account to which you want to add a Card Holder (not required for WIN-PAK 2005).
2. Click **Card** > **Card Holder**. The Card Holder window appears.
3. Select the desired card holder.
4. Click **Delete**.

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

To Add a Card

1. Select **Account** from the menu for the name of the account to which you want to add a Card Holder (not required for WIN-PAK 2005).
2. Click **Card > Card**. The Card window appears.
3. Click **Add**. The Card Record window appears displaying the Card Properties tab.
4. In the Card Number box, enter the card number.
5. Configure the access level:
    - For systems configured for Precision Access Levels (standard), click the pull-down arrow in the Access Level box, and select an access level for the card. Custom Access Levels can be created. See “Custom Access Levels” in your User Guide for further information.
    - For systems configured for Multiple Access Levels, click **Edit**. Select from the Available side one to six access levels to assign the card.
6. If your system requires a PIN (personal identification number), enter it in the PIN field. A PIN can be added to the card later.
7. Set the card status and select any other options you want.
8. To associate 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.
9. 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. Select **Account** from the Menu for the name of the account to which you want to add a Card Holder (not required for WIN-PAK 2005).
2. Click **Card > Card**. The Card window appears.
3. Select the card you want to delete from the card database list.
4. Click **Delete**.
5. If asked to confirm the delete, click **Yes** to delete the card or click **No** to cancel the delete.

Note: 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, click **System > 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. Click **Card > Card**. The Card window appears.
2. From the list of cards, select a card or range of cards, and then click **Print Badge**.

   Note: 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.

3. Click **Print**.

To Add an Access Level

1. Click **Card > 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 60 characters.
5. Perform this step only for WIN-PAK PRO 2005: select from Available Accounts the accounts that can select this access level (not required for WIN-PAK 2005).

6. 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.
7. Right-click an Access Area folder, then click **Configure**. The Configure Area Access window appears.
8. To allow access to all doors in the area, select **Set Access** for all entrances in this area.
9. Click the pull-down arrow in the Time Zone box, and select a time zone from the list.
10. Click **OK**. The Access Level dialog box appears.
11. In the Access Level window, right-click individual entrances on the branch to customize the settings as necessary. Continue this procedure until the access level has the required configuration.

Note: It is easy to tell at a glance what areas are included in a given access level. Select an access 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.

Operations

 To Open an Alarm View

Click the **Alarm View** toolbar button or select **Alarms** from the Operations menu to open the Alarm View dialog box.

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 added 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.

> **Note:** 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 messages, click the **Freeze** button. [The button 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.

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. Right-click an alarm, and then click the **Add Note** button to open the Add Operators Note dialog box.
2. Type the message and then click **OK**. These notes are included in history and can be printed with the History report.

To Operate Digital Video

1. Click **Operations > Digital Video** from the Operations menu to open the Digital Video window.
2. In the Digital Video window, select a camera.
3. Select whether to view live video or recorded video [Clip From] in the View Video section of the window, then click **Show** to operate the desired camera or display recorded video from the camera.

   The recorded video displayed will be for the time selected in the View Video section of Digital Video window. For live video, use the camera controls in the lower left portion of the digital display window to adjust the camera as necessary.
4. Repeat the above steps to display additional camera views.

   Note: Multiple cameras can be selected by using the **Shift** or **Control** keys while selecting cameras.

Filter Control

1. Click the **Filter** button to open the Event Filter window.
2. Click the **Event Filter** tabs to define which events to display in the Digital Video window. Defined events will subsequently be displayed in the Digital Video window.

Events associated with a digital camera will be displayed with a camera icon [either fixed or PTZ (pan tilt zoom), represented with a zoom lens]. Selecting one of these events will automatically select its associated camera and recorded video clip for display. Clicking **Show** will display the associated recorded video clip, unless live video is selected, in which case the associated camera will display the live video.

To Open a Floor Plan

1. Click the **Open Floor Plan** toolbar button or click **Operations > Floor Plan** to open the Open Floor Plan dialog box.
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 devices from the floor plan, right-click an ADV to open the control menu, then click the command. The commands available depend on the type of object you have selected.

To Enlarge or Reduce the Floor Plan View

1. Right-click in an area of the floor plan (not on an ADV), then click **Zoom**. Select a preset percentage of enlargement, reduction, or Fit 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 enlarged to the degree that scroll bars appear, 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. Click the **Control Map** toolbar button or click **Operations > 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 any device to open its control menu, and then click the desired command.

Status Symbols

One of four status symbols may appear before an ADV icon on the Control Map screen:

-  = alarm.
-  = normal.
- = trouble.
-  = unknown.

The status symbols will darken after their respective conditions have been acknowledged and cleared.

A forbidden symbol  overlaid over a status symbol indicates that the corresponding point is shunted or the panel is buffered.

Placing the mouse over the status symbols will bring up a textual description of the status for each ADV.

To Generate, View, Print or Export a Report

Some reports are account sensitive. Card and card holder reports are generated by account. To generate these reports, simply select the account of your choice and then proceed to select and filter the report, as outlined below.

1. Click the **Run Reports** toolbar button or click **Reports > Reports** from the Reports menu.
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 display the report's estimated number of pages.
4. After selecting the options you want, 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 the 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, page range, and number of copies. You can make any other desired changes to your printer setup.
7. To export the report, click **Export File**. The Export File window appears. In the window set the Delimiter option and give the report a file name.

Database Backup and Restore Utility

In the event of software or hardware problems, it is always a good idea to have a recent copy of your database files.

The WIN-PAK Backup and Restore utility is a stand-alone application that allows the user [typically a database administrator] to create and modify a backup and restore plan.

Database copies made with the Backup and Restore utility can be used to restore or recreate your database after a failure has occurred.

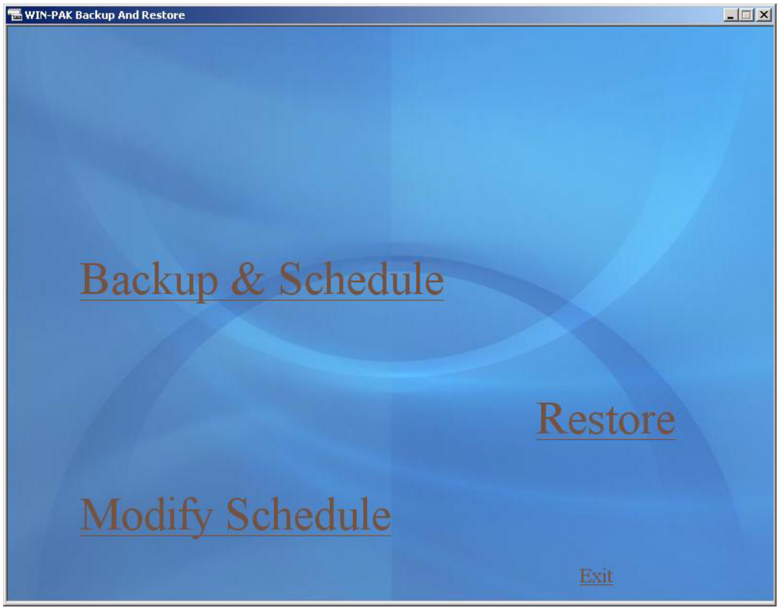
The WIN-PAK Backup and Restore utility allows for the creation of multiple scheduled backups, and for the restoration of the WIN-PAK database, the archive database, and a temporary database which allows you to examine the restoration without affecting the current WIN-PAK databases.

The WIN-PAK Backup and Restore Utility is automatically installed when the WIN-PAK System is installed. The utility is accessed from the WIN-PAK Program group on the Start menu. The WIN-PAK Backup and Restore Utility is made up of three components: Backup, Schedule, and Restore.

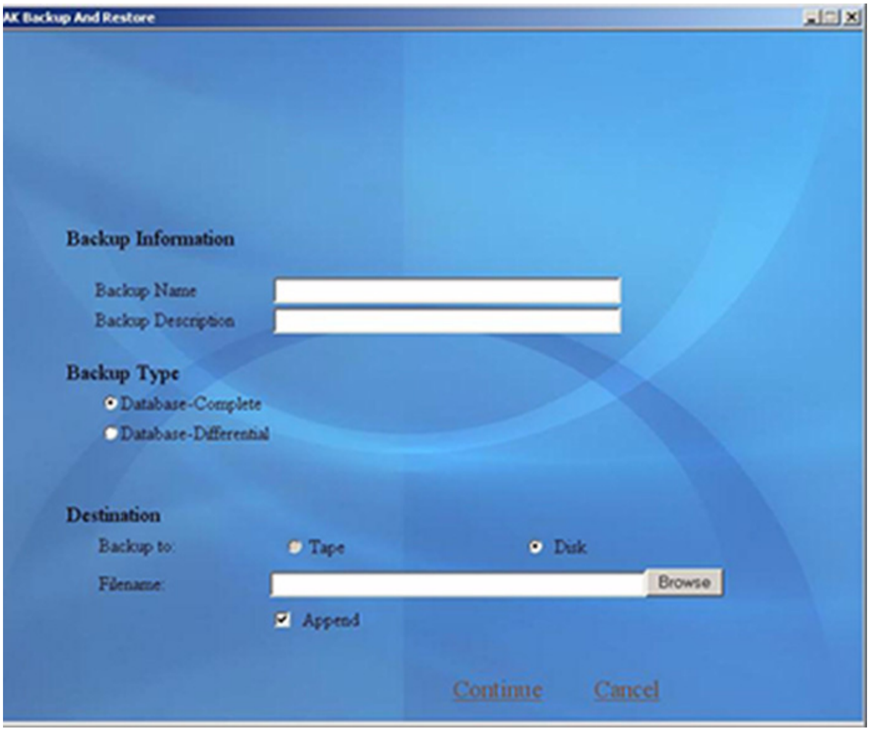
The Backup and Restore utility will only backup the WIN-PAK hardware and history database information. Other data, such as badge images, signatures, user images, and floor plan graphics are not backed up by this utility. This data is normally found in the `C:\Program Files\WINPAKPRO\DATABASE` folder with `BadgeImage`, `FloorPlanImage`, and `UserImage` subfolders. During the WIN-PAK installation, the program prompts the installer to place these subfolders at other locations in the system. Therefore you may not find these subfolders in the WINPAKPRO folder. Backup of these data folders can be accomplished using standard Windows backup or copying utilities. Both should be done at the same time to keep all information current.

Backup

1. Click **Backup & Schedule** from the main Backup and Restore dialog box to create a new backup.



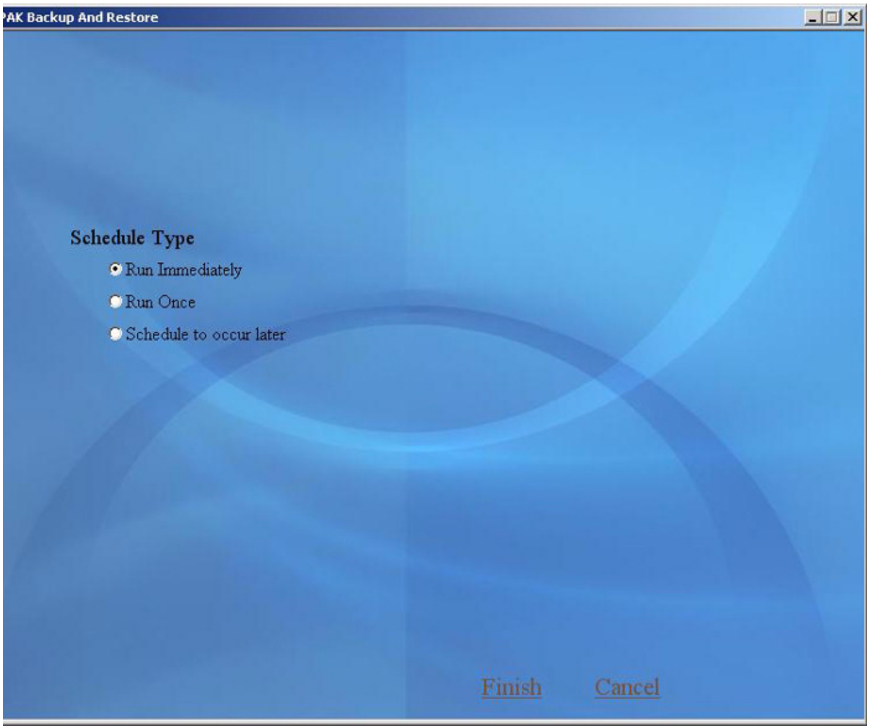
2. When the Backup Information window is displayed, enter a unique Backup Name, as well as an (optional) Description.
3. Select a database Backup Type. **Complete** will make a complete backup and **Differential** will back up only the differences from the last complete, appended or differential backup.



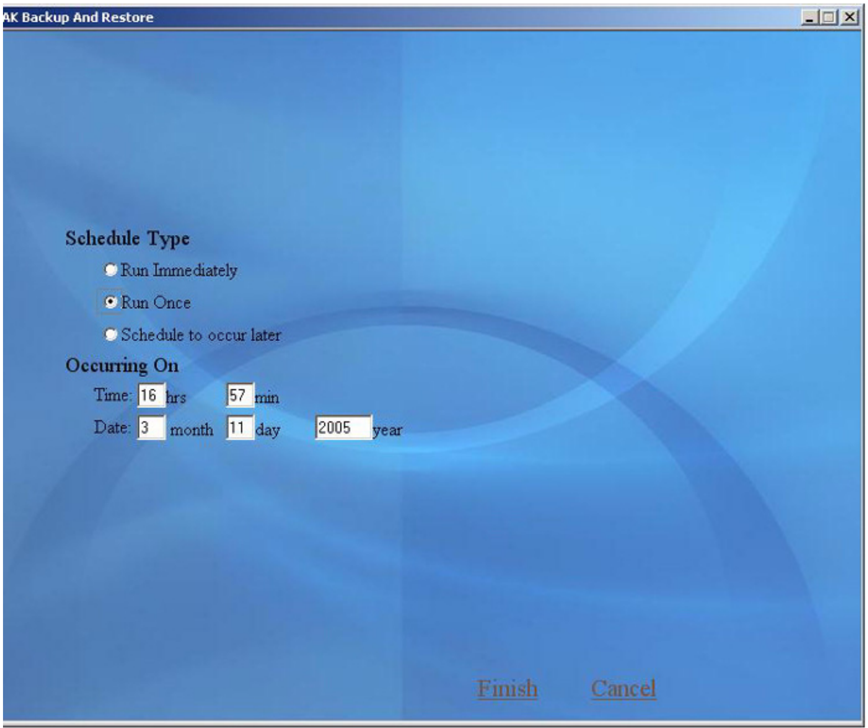
4. Select a Destination and file name for the backup. If a tape drive is not installed on the computer you can not select Tape. If a tape drive is on the computer, then the option to format the tape is also given.

Note: Some tape drives may not be supported by the current backup restore utility. In those cases, the tape drive software can still be used to back up files that were created by the WIN-PAK Backup and Restore program.

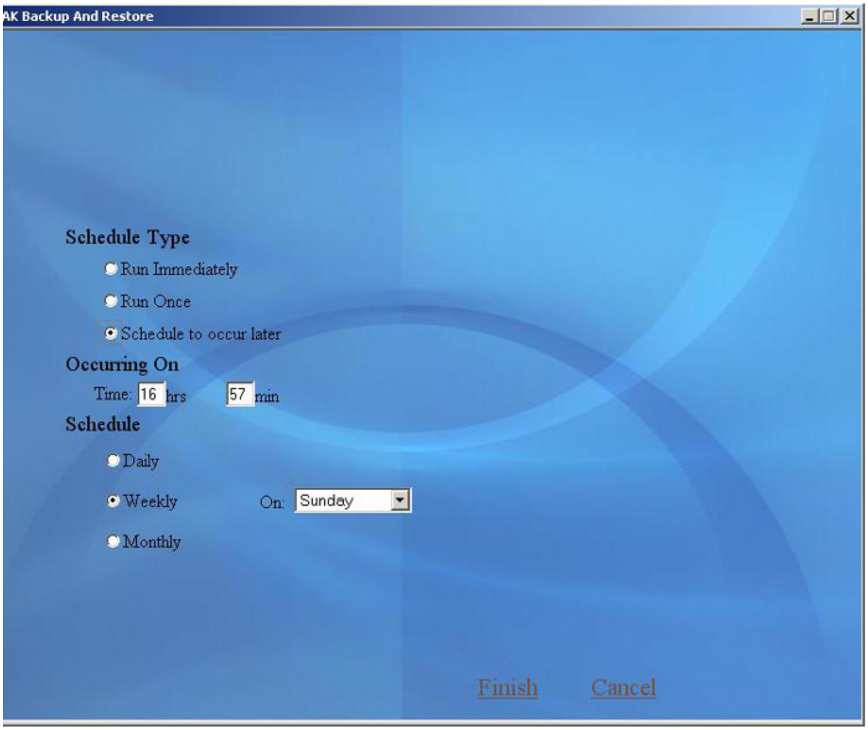
5. Click **Continue** to bring up the Scheduling window (next illustration).



6. Select the **Schedule Type**. **Run Once** will prompt for the time and date.



Schedule to occur later will bring up Daily, Weekly, and Monthly options (next illustration).



Daily allows the back up to be run every so many days as defined from 1-999 day(s) at the specified time.

Weekly allows the back up to be run on a specified day of the week at a specified time.

Monthly allows the backup to be run on the selected day of the month (1-31) or at regular monthly intervals.

Schedule

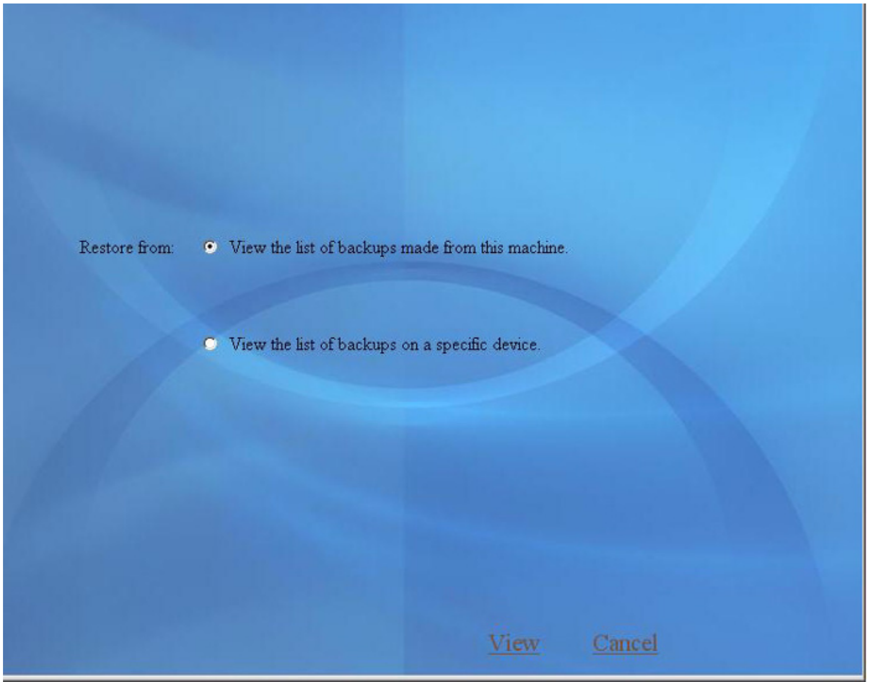
Schedules can be modified by clicking **Modify Schedule** from the main Backup and Restore dialog box. To open a list of currently-scheduled backups, highlight a backup in the main schedule list and click on modify. This will bring up the Schedule screens shown above. Modify the schedule and click **Finish**.

To remove a schedule, select the backup schedule and click **Delete**.

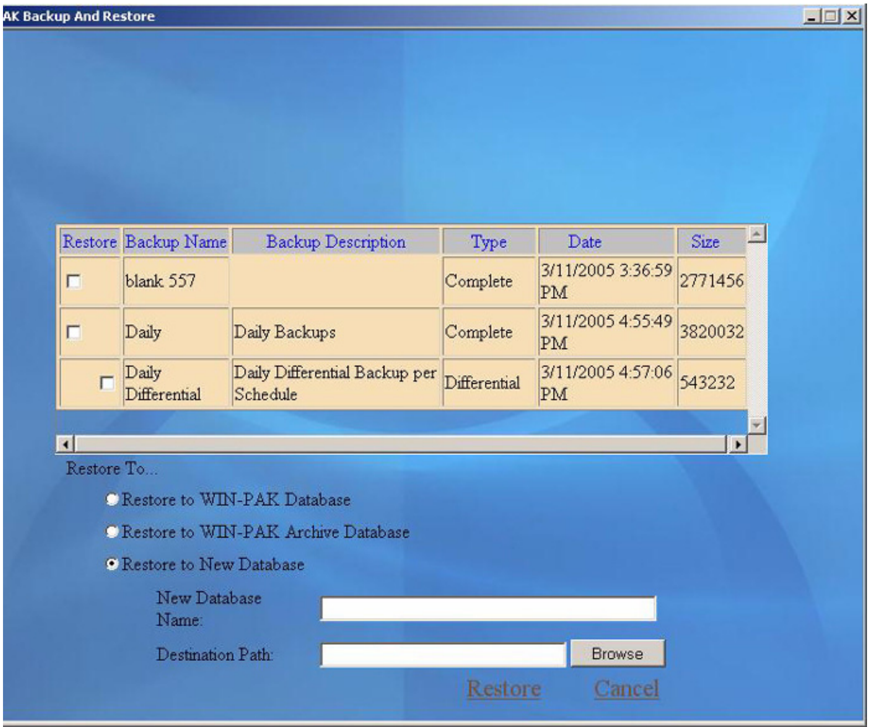
Click **Cancel** to return to the main Backup and Restore window.

Restore

1. Select **Restore** from the main Backup and Restore window to restore a backup. WIN-PAK's database knows the locations that the backups were made on this machine. If the backup is to be recovered from a different location, then select the **View** list of backups on a specific device option and navigate to the desired location.



2. Once the appropriate backup file is selected, a viewer (next illustration) shows the contents of that backup. Select the backup file desired. If selecting a differential backup, the last complete backup is automatically selected, as that is required to complete the restore process.



3. Use the Restore list to set the parameters for the backup. Restoring the WIN-PAK Database requires that the WIN-PAK database services be turned off. The restoration process will not proceed if the services are running. Restoring to WIN-PAK Archive Database replaces the existing archive database and allows reports to be generated from the archive.

   Restoring to New Database allows advanced users to view the database without adversely affecting the current or backup database.

4. Click **Restore** to continue. When finished, click **Cancel** or **Exit**.

   Note: Scheduled backups run automatically as long as the MSSQLServerAgent components are running. By default these components are set to run when the operating system starts.

5. To check if MSSQLServerAgent components are running, double click the icon (shown below) in the tray on the bottom of the Window.

6. From the Services box, select **MSSQLServer**.

   The message on the bottom of the SQL Server Service Manager windows will give you the computer name followed by "MSSQLServer-Running." Select the SQLServerAgent. The message on the bottom of the SQL Server Service Manager windows will give you the computer name followed by "SQLServerAgent-Running."

7. If MSSQLServerAgent components are not running, click the **Start/Continue** button.

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