

# ACCESS IT! NEXt STEP USERS MANUAL

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# WELCOME TO ACCESS IT! NEX T STEP

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Thank you for choosing Access It! NExT Step as your access control and photo id badging solution!

Access It! NExT Step is an access control network appliance that was developed with ease of use as a cornerstone. No necessary software installation, default configuration and hardware auto-detection, and a single screen user interface make it very easy to get up and running.

This help file was intended to be a step by step reference to be used while data is being entered into Access It! NExT Step. The first time the help file opens, the table of contents will shown.

For additional product information and support, please visit our website at [RS2 Tech](#)

# SYSTEM SPECIFICATIONS

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Access It! NExT Step has the following system specifications:

- One EP system control processor
- Up to 31 MR-50's or up to 15 MR-52's
- Up to 64 Readers with the first 8 being free of charge
- Up to 512 Inputs with the use of MR-16IN's
- Up to 512 Outputs with the use of MR-16OUT's
- Door Contact for each door
- Door Strike for each door
- Door Egress Button for each door
- Up to 5,000 Cards
- Up to 32 Access Levels
- Up to 32 Timezones
- Up to 32 Holidays
- Up to 64 Tasks
- Up to 6 Access Levels per Card
- Up to 20 User Text Fields per Card
- Adobe Flash support for picture and signature capture
- Available Badge Designer
- Available Import and export utility
- Available Batch record updating

**These specifications are subject to change without notice from the manufacturer.  
Some of the above features are optional and must be purchased separately.**

# ACCESS IT! NEX T STEP SYSTEM REQUIREMENTS

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Access It! NExT Step has the following Software and Hardware requirements:

## SUPPORTED WEB BROWSERS:

- Microsoft Internet Explorer 9 or Higher
- Google Chrome version 22 or Higher

## SUPPORTED REMOTE ACCESS METHODS:

- Windows Remote Desktop
- TeamViewer

# ACCESS IT! NEXT STEP CLIENT/SERVER CONFIGURATION

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## GENERAL NOTES

1. The network appliance can reside on any ethernet network and can be configured with either a static IP Address or setup to utilize DHCP.
2. Exceptions may need to be made for firewalls running on the network to allow for traffic to and from the network appliance on TCP port 80. Additionally, if Remote Desktop connectivity is required, port 3389 will also need to be opened.

# RUNNING ACCESS IT! NEX T STEP FOR THE FIRST TIME

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When running Access It! NEX T Step for the first time, the system must be set up before the application can be used. Proceed through the following steps to set up Access It! NEX T Step.



## STEP 1 - LOGIN

To login to Access It! NEX T Step for the first time, browse to the default IP address of 192.168.0.10. The default username is Admin and the default password is password.

## STEP 2 - NETWORK APPLIANCE CONFIGURATION

To configure the network appliance for DHCP or to utilize a static IP address, go to the Settings screen by clicking the Settings button within the System group. Contact your network administrator for network parameters. Additionally, timezone and date/time settings can be made in the settings screen.

## STEP 3 - HARDWARE CONFIGURATION

Access It! NEX T Step ships with a default hardware configuration. To view/edit the default configuration, click the  Configuration button within the System group on the toolbar. To edit the configuration from the default, either click on the  Edit button on the toolbar. For additional information on the Configuration parameters, go to the [Configuration](#) help topic file.

# CARDS



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Cards are used to maintain cards or card holders (people) within the database. Cards differ from the other data files in that there are no pre-defined cards in the database. Select any of the following topics for more detailed information.

[Add A Card](#)

[Find A Card](#)

[Edit A Card](#)

[Delete A Card](#)

[Preview A Card](#)

[Print A Card](#)

[Bulk Card Add](#)

# ADDING CARDS



## ADDING A CARD

To get to the Card data entry screen click on the  Cards button within the Data Files group. To add a card, either click on the  New option on the toolbar.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.

## CARD NUMBER

Enter the encoded card number. The encoded card number is the number that has been programmed into the card by the card manufacturer. The card number can range from 1 to 2147483647.

In certain card formats, the encoded card number and the printed card number may be different.

## LAST NAME

Enter the last name for the card holder. This name can be up to 50 characters in length.

## FIRST NAME

Enter the first name for the card holder. This name can be up to 50 characters in length.

## MIDDLE INITIAL

Enter the middle initial for the card holder. This name can be up to 1 character in length.

## PIN NUMBER

Enter the PIN number for the card. The PIN number will be required at any doors that have a keypad reader and the reader mode is set to PIN only, card or PIN or card and PIN. The PIN number can range from 4 to 9 digits in length depending upon the number of PIN digits setting used during configuration. A random, automatically generated PIN number can be assigned by clicking the Auto button. For more information on reader modes, see the [Doors](#) help file topic. For more information on configuration see the [Configuration](#) help file topic.

All PIN numbers must be unique in the database. The system DOES NOT check for PIN number uniqueness.



## EXTENDED ACCESS TIMES

Select (check) this option if this card is to have extended door access times. The door will remain unlocked and allowed to stay open longer than cards without this option selected. For more information on extended access, see the [Doors](#) help file topic.

## CARD STATUS

- *Inactive* - The card will be inactive and will not work at any of the doors in the system regardless of the access levels assigned to the card.
- *Active* - The card will be active and will work at any of the doors in the system that the access levels assigned to the card allow.
- *Date Based* - The card will become active at midnight on the date entered in the active date field and will become inactive at midnight on the date entered in the expire date field.

## ACCESS LEVELS

Select up to six access levels for the card. The access levels are used to determine when and where a card will be allowed access to a door or group of doors. For more information on access levels, see the [Access Levels](#) help file topic.

## BADGE TYPE

Select the badge type for the card. The badge type will determine the graphical appearance and layout of the card when it is printed or previewed to the screen. For more information on badge types, see the [Badge Types](#) help file topic.

**Only badge types that have been designed and saved using the badge type designer will be available for selection.**

## ISSUED BY

This field stores the user name of the logged in user whenever the card is printed. This field is only updated when the card is printed and not when the card is previewed to the screen. This field is not updateable by any other means than printing the card.

## DATE ISSUED

This field stores the current date and time whenever the card is printed. This field is only updated when the card is printed and not when the card is previewed to the screen. This field is not updateable by any other means than printing the card.

## NUMBER OF TIMES PRINTED

This field stores the number of times that the card has been printed. Each time the card is printed, this field will be automatically incremented by one. This field is only updated when the card is printed and not when the card is previewed to the screen. This field is not updateable by any other means than printing the card.

## USER INFO TABS

Enter up to 20 user defined fields. These user fields can be used for supplemental information, such as department, license plate number, etc. These fields can be up to 50 characters in length. The labels for these user fields can be changed by clicking on the Edit User Labels button and editing the label names as desired. Once a user field label name has been changed, it will print on all of the associated reports whether or not data is contained in these fields.

## CAPTURE

The Capture button is used to activate the capture window and capture an image or signature for the card holder. The Capture button will use the default capture device on your system. This device must be Microsoft DirectShow compatible. For information regarding the capture device, see the manufacturer's documentation for the capture device being used.

**The style and functionality of the capture window will vary depending upon the type of capture device being used. See the manufacturer's documentation for the capture device for further information about the capture window.**

## CAPTURE TOOLS

The capture tools button is used to bring up a tools menu for image or signature capturing. The following tools are available:

- *Cut* - The cut option is used to delete the current image or signature and copy it to the clipboard. This option is useful for either deleting an unwanted image or signature from a card holder, or for moving an image or signature to the clipboard.
- *Copy* - The copy option is used to copy the current image or signature to the clipboard. This option is useful for copying a card holder image or signature to the clipboard and pasting into an imaging application such as windows paintbrush.
- *Paste* - The paste option is used to paste the contents of the clipboard into the image or signature capture window. This option is useful for capturing images or signatures created with a windows paintbrush application, or from another imaging application that does not have TWAIN or VFW software drivers.
- *Import* - The import option is used to capture an image or signature from a physical disk file. This

option is useful for capturing images or signatures from capture devices that have the capability of storing images or signatures to a file. The supported image file formats are JPEG (.JPG) and Windows Bitmap (.BMP).

- *Export* - The export option is used to export a captured image or signature to a physical disk file. This option is useful for exporting images or signatures for use with imaging applications that can use disk based image or signature files. The supported image or signature file formats are JPEG (.JPG) and Windows Bitmap (.BMP).
- *WIA/Twain Acquire* - The Twain option is used to select the TWAIN device source and to acquire (capture) an image or signature from the selected TWAIN source. This option is useful if an image or signature is being captured using a TWAIN device that is not set as the default capture device. For example, if the Integral Technologies FlashBus capture card is the normally used capture device and remote images or signatures are captured with a digital camera, the TWAIN option could be used to gather the images or signatures from the camera without having to change the default image or signature capture device. *The TWAIN sources will vary according to the third party device drivers that are installed on the local workstation.*
- *Use WIA/Twain Acquire as default* - This option sets WIA/Twain acquire as the default method for capturing images.
- *Adjust* - The Zoom option can be used to correct an image captured from too great a distance. Use the up/down arrows to achieve the desired zoom level. The adjust Brightness/Contrast options are used to adjust the brightness or contrast of a captured image or signature. These options are useful for enhancing images or signatures that were captured under poor lighting conditions. To adjust the brightness and/or contrast, click on the up/down arrows to increase or decrease the brightness or contrast of the image or signature. Click on Save to accept the changes to the image or signature or click on Cancel to exit without saving the changes. To return to the original image properties without adjusting Zoom, Brightness, or Contrast, click the Restore All button.


## OK/CANCEL BUTTONS

Clicking the OK button will save the new card data. Clicking the Cancel button will exit the data entry screen without saving the new card.




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## FIND NOW

To find a specific card, go to the Cards data entry screen by clicking on the  Cards button within the Data Files group.

A specific card can be located by entering either the card number or the card holder's last name and clicking the Find Now button. Utilizing the drop down menu to the right of the Find: button, there is an option to display all cards in the system or to display all cards for Last Names that begin with 'A' through Last Names that begin with 'Z'. The resulting list of cards can be sorted by clicking on any of the titles in the display window. The list can then be manually searched to find the desired card.

## ADVANCED FIND

The Advanced Find  option is used to find cards by fields other than card number or last name. The Advanced Find option is also used to build more advanced queries that can contain more than one search parameter. These advanced queries can also be saved to disk and loaded later for re-use.

## FIELD

Select the field to be searched.

## CONDITION

Select the condition that the data must meet to be included in the search results. The following conditions are available:

- *Is Equal To* - The value stored in the data field must be exactly the same as the value being searched for to be included in the search results. This is the equivalent of "=" in most query languages.
- *Is Not Equal To* - The value stored in the data field must not be exactly the same as the value being searched for to be included in the search results. This is the equivalent of "<>" in most query languages.
- *Is One Of* - The value stored in the data field must be the same as one of the values being searched for to be included in the search results. This is the equivalent of "OR" in most query languages.
- *Is Not One Of* - The value stored in the data field must not be the same as any of the values being

searched for to be included in the search results. This is the equivalent of "<>" and "OR" in most query languages.

- *Is Less Than* - The value stored in the data field must be less than the value being searched for to be included in the search results. This is the equivalent of "<" or "LESS THAN" in most query languages.
- *Is Less Than Or Equal To* - The value stored in the data field must be less than or the exactly the same as the value being searched for to be included in the search results. This is the equivalent of "<=" or "LESS THAN OR EQUAL TO" in most query languages.
- *Is Greater Than* - The value stored in the data field must be greater than the value being searched for to be included in the search results. This is the equivalent of ">" or "GREATER THAN" in most query languages.
- *Is Greater Than Or Equal To* - The value stored in the data field must be greater than or exactly the same as the value being searched for to be included in the search results. This is the equivalent of ">=" or "GREATER THAN OR EQUAL TO" in most query languages.
- *Is Between* - The value stored in the data field must be greater than or the same as the first value being searched for and less than or the same as the second value being searched for to be included in the search results. This is the equivalent of ">= AND <=" in most query languages.
- *Is Not Between* - The value stored in the data field must not be greater than or the same as the first value being searched for and not less than or the same as the second value being searched for to be included in the search results. This is the equivalent of "< AND >" in most query languages.
- *Is Like* - The value stored in the data field must be similar to the value being searched for to be included in the search results. This is the equivalent of "\*abc\*" or "LIKE" in most query languages.
- *Is Not Like* - The value stored in the data field must not be similar to the value being searched for to be included in the search results. This is the equivalent of "\*abc\*" or "NOT LIKE" in most query languages.
- *Is Empty* - The value stored in the data field must empty or null to be included in the search results. This is the equivalent of "" or "NULL" in most query languages.
- *Is Not Empty* - The value stored in the data field must not be empty or null to be included in the search results. This is the equivalent of "" or "NOT NULL" in most query languages.

## VALUE

Select or enter the value to be searched for. This field will vary based upon the condition that is selected. For some conditions, one value may be required and for other conditions multiple values may be required.

## ADD

After specifying the search field, condition and value(s), click on the Add to List button to add the

search criteria item to the list of search parameters. Multiple search criteria items can be added to refine the search parameters. All search criteria items are added together during the search.

## REMOVE

Search criteria items can be removed by selecting (clicking) an item in the list of search parameters and clicking the Remove button.

## LOAD SEARCH

Search parameters can be loaded from previously saved queries by clicking on the Load Search button and selecting a saved query. All of the previously saved search criteria items will be loaded into the search parameter list. This option is useful for frequently run complex searches.



## SAVE SEARCH

Search parameters can be saved to disk by clicking on the Save Search button and assigning a name to the saved query. All of the search criteria items will be saved for later use. This option is useful for frequently run complex searches.

# EDITING CARDS



## EDITING CARDS

To edit a card, first go to the Cards data entry screen by clicking on the  Cards button within the Data Files group. The list of cards can be sorted by clicking on the card number or last name titles in the display window. Cards can also be searched for by using the Find: function. For more information on finding specific cards, see the [Finding Cards](#) help file topic. Select the card to be edited and click on the  Edit button on the toolbar or double click the card to be edited. The cards will either have green, red or yellow icons. A green card icon indicates an active card. A red card icon indicates an inactive card. A yellow icon indicates a card with date based activation.



*Active Card*



*Inactive Card*



*Date Based Card*

## CARD NUMBER

Enter the encoded card number. The encoded card number is the number that has been programmed into the card by the card manufacturer. The card number can range from 1 to 2147483647.

**In certain card formats, the encoded card number and the printed card number may be different.**

## LAST NAME

Enter the last name for the card holder. This name can be up to 50 characters in length.

## FIRST NAME

Enter the first name for the card holder. This name can be up to 50 characters in length.

## MIDDLE INITIAL

Enter the middle initial for the card holder. This name can be up to 1 character in length.

## PIN NUMBER

Enter the PIN number for the card. The PIN number will be required at any doors that have a keypad reader and the reader mode is set to PIN only, card or PIN or card and PIN. A random, automatically generated PIN number can be assigned by clicking the auto button. For more information on reader modes, see the [Doors](#) help file topic.

**All PIN numbers must be unique in the database. The system DOES NOT check for PIN number uniqueness.**

## EXTENDED ACCESS TIMES

Select (check) this option if this card is to have extended door access times. The door will remain unlocked and allowed to stay open longer than cards without this option selected. For more information on extended access, see the [Doors](#) help file topic.

## CARD STATUS

*Inactive* - The card will be inactive and will not work at any of the doors in the system regardless of the access levels assigned to the card. *Active* - The card will be active and will work at any of the doors in the system that the access levels assigned to the card allow. *Date Based* - The card will become active at midnight on the date entered in the active date field and will become inactive at midnight on the date entered in the expire date field.

## ACCESS LEVELS

Select up to six access levels for the card. The access levels are used to determine when and where a card will be allowed access to a door or group of doors. For more information on access levels, see the [Access Levels](#) help file topic.

## BADGE TYPE

Select the badge type for the card. The badge type will determine the graphical appearance and layout of the card when it is printed or previewed to the screen. For more information on badge types, see the [Badge Types](#) help file topic.

**Only badge types that have been designed and saved using the badge type designer will be available for selection.**

## ISSUED BY

This field stores the user name of the logged in user whenever the card is printed. This field is only updated when the card is printed and not when the card is previewed to the screen. This field is not updateable by any other means than printing the card.

## DATE ISSUED



This field stores the current date and time whenever the card is printed. This field is only updated when the card is printed and not when the card is previewed to the screen. This field is not updateable by any other means than printing the card.

## NUMBER OF TIMES PRINTED

This field stores the number of times that the card has been printed. Each time the card is printed, this field will be automatically incremented by one. This field is only updated when the card is printed and not when the card is previewed to the screen. This field is not updateable by any other means than printing the card.

## USER INFO TABS

Enter up to 20 user defined fields. These user fields can be used for supplemental information, such as department, license plate number, etc. These fields can be up to 50 characters in length. The labels for these user fields can be changed by clicking on the edit user labels button and editing the label names as desired. The user field labels can be reset to factory defaults by clicking on the reset all button while editing the user field labels. Once a user field label name has been changed, it will print on all of the associated reports whether or not data is contained in these fields, until the user label is reset to the factory default name.

## CAPTURE

The capture button is used to activate the capture window and capture an image or signature for the card holder. The Capture button will use the default capture device on your system. This device must be Microsoft DirectShow compatible. For information regarding the capture device, see the manufacturer's documentation for the capture device being used.

**The style and functionality of the capture window will vary depending upon the type of capture device being used. See the manufacturer's documentation for the capture device for further information about the capture window.**

## CAPTURE TOOLS

The capture tools button is used to bring up a tools menu for image or signature capturing. The following tools are available:

- *Cut* - The cut option is used to delete the current image or signature and copy it to the clipboard. This option is useful for either deleting an unwanted image or signature from a card holder, or for moving an image or signature to the clipboard.
- *Copy* - The copy option is used to copy the current image or signature to the clipboard. This option is useful for copying a card holder image or signature to the clipboard and pasting into an

imaging application such as windows paintbrush.

- *Paste* - The paste option is used to paste the contents of the clipboard into the image or signature capture window. This option is useful for capturing images or signatures created with a windows paintbrush application, or from another imaging application that does not have TWAIN or VFW software drivers.
- *Import* - The import option is used to capture an image or signature from a physical disk file. This option is useful for capturing images or signatures from capture devices that have the capability of storing images or signatures to a file. The supported image file formats are JPEG (.JPG) and Windows Bitmap (.BMP).
- *Export* - The export option is used to export a captured image or signature to a physical disk file. This option is useful for exporting images or signatures for use with imaging applications that can use disk based image or signature files. The supported image or signature file formats are JPEG (.JPG) and Windows Bitmap (.BMP).
- *WIA/Twain Acquire* - The Twain option is used to select the TWAIN device source and to acquire (capture) an image or signature from the selected TWAIN source. This option is useful if an image or signature is being captured using a TWAIN device that is not set as the default capture device. For example, if the Integral Technologies FlashBus capture card is the normally used capture device and remote images or signatures are captured with a digital camera, the TWAIN option could be used to gather the images or signatures from the camera without having to change the default image or signature capture device. **The TWAIN sources will vary according to the third party device drivers that are installed on the local workstation.**
- *Use WIA/Twain Acquire as default* - This option sets WIA/Twain acquire as the default method for capturing images.
- *Adjust* - The adjust brightness/contrast option is used to adjust the brightness or contrast (lightness or darkness) of a captured image or signature. This option is useful for enhancing images or signatures that were captured under low light conditions. To adjust the brightness and or contrast, click on the sliders to increase or decrease the brightness or contrast of the image or signature. Click on apply to save the changes to the image or signature or click on cancel to cancel the changes.

## OK/CANCEL BUTTONS


Clicking on the OK button will save the changes to the card data. Clicking on Cancel button will exit screen without saving the changes.


# DELETING CARDS

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## DELETING A CARD



To delete a card, go to the Cards data entry screen by clicking on the  Cards button within the Data Files group. To view all cards currently in the database, click the Find Now button with "All Cards" displayed in the drop down box. The list of cards can be sorted by clicking on the card number or last name titles in the display window. Cards can also be searched for by clicking the Find Now or Find: buttons. For more information on finding specific cards, see the [Finding Cards](#) help file topic.

Select the card to be deleted and either click on the  Delete button on the toolbar. You will be asked to confirm the deletion, click Yes to delete the card and No to cancel the deletion.

# PREVIEWING CARDS



## PREVIEWING A CARD

Cards can be previewed by going to the Cards data entry screen by clicking the  Cards button within the Data Files group. To display all of the cards in the database, click the Find Now button with "All Cards" displayed in the drop down box. The list of cards can be sorted by clicking on the card number or last name titles in the display window. Cards can also be searched for by using the Find:, Find Now or  Advanced Find options. For more information on finding specific cards, see the [Finding Cards](#) help file topic. Select the card to be previewed and click on the Preview Badge button on the toolbar.

The card preview window will then be displayed. The card preview window displays the card with the selected badge type and all assigned data fields, signatures and images. If the card being previewed is a dual sided card, both the front and back of the card will be displayed in the window. Clicking on the Print button will send the card to the printer defined for the badge type of the card being previewed. This printer is assigned when Badge Properties are selected. For more information on Badge Properties, see the [Badge Properties](#) help file topic.

If no printer is defined for the badge type of the card being previewed, the card will be sent to the default system printer when the print button is clicked.

This feature is optional and must be purchased separately

# PRINTING CARDS



Cards can be printed manually by going to the cards data entry screen by either clicking on the Cards button within the Data Files group on the toolbar. All of the cards in the database will then be displayed in the right window pane of the Access It! NExT Step desktop. The list of cards can be sorted by clicking on the card number or last name titles in the display window. Cards can also be searched for by using the Find Now button. For more information on finding specific cards, see the [Finding Cards](#) help file topic. Select the card to be printed and click on the Print Badge button on the toolbar. The card will be sent to the printer defined for the badge type of the card being printed. This printer is assigned during badge design. For more information on the badge design, see the [Add a Badge Type](#) help file topic.

**If no printer is defined for the badge type of the card being printed, the card will be sent to the default system printer when the print button is clicked.**

## PRINT CARD REPORTS

There are several card report formats available for printing. Single or multiple cards may be included in the report as determined by user-defined criteria. Once the selected card(s) are displayed in the right window pane of the Access It! NExT Step desktop, the cards can be printed by going to System Menu ⇒ Cards ⇒ Print and selecting one of the following report format options.


- *Dossier Report (1 card per page)* - The following fields are included on the report: picture, last name, first name and middle initial. The report is sorted by last name.
- *Summary Card Report - With Pictures* - The following fields are included on the report: picture, signature, last name, first name, middle initial and card number. The report is sorted by last name.
- *Summary Card Report - No Pictures* - The following fields are included on the report: last name, first name, middle initial, card number, and access levels. The report is sorted by last name.
- *Detail Card Report - With Pictures* - The following fields are included on the report: picture, signature, last name, first name, middle initial, card number, PIN number, extended access times, card status/active date range, badge type, date issued, issued by, number of times printed, access levels and any user defined fields that contain data. The report is sorted by last name.
- *Detail Card Report - No Pictures* - The following fields are included on the report: last name, first name, middle initial, card number, PIN number, extended access times, card status/active date range, badge type, date issued, issued by, number of times printed, access levels and any user defined fields that contain data. The report is sorted by last name.

The formatted report will pop up in a new window from which it can be previewed and printed.

This feature is optional and must be purchased separately

# BULK CARD ADD



Bulk Card Add is used to enter a single card or a range of cards into the database in a simple step by step format. To get to the Bulk Card Add screen, click on the Utilities Group on the toolbar and then select  Bulk Card Add. **Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.**

## NUMBER OF CARDS

Use the up/down arrows to select the number of cards to be added.

## CARD NUMBER

Enter the first card number to be added to the database. The first card number will be added and then subsequent cards (if multiple cards are being added) will be incremented by one for each card being inserted. **Ensure that the entire range of card numbers to be added are not currently in the database as attempting to add existing card numbers will cause an error.**

## LAST NAME

Enter the last name for the card holder. The last name can be up to 50 characters in length.  
**This field is required.**

## FIRST NAME

Enter the first name for the card holder. The first name can be up to 50 characters in length.  
**This field is required.**

## MIDDLE INITIAL

Enter the middle initial for the card holder. The middle initial can be up to 1 character in length.

## PIN NUMBER

Enter the PIN number for the card. The PIN number will be required at any doors that have a keypad reader and the reader mode is set to PIN only, card or PIN or card and PIN. The PIN number can range from 4 to 9 digits in length depending upon the number of PIN digits setting used during configuration. A random, automatically generated PIN number can be assigned by clicking the Auto button. For more information on reader modes, see the [Doors](#) help file topic. For more information on configuration see

the [Configuration](#) help file topic.

All PIN numbers must be unique in the database. The system DOES NOT check for PIN number uniqueness.

## EXTENDED ACCESS TIMES

Select (check) this option if this card or range of cards is to have extended door access times. The door will remain unlocked and allowed to stay open longer than cards without this option selected. For more information on extended access, see the [Doors](#) help file topic.

## CARD STATUS

- *Inactive* - The card or range of cards will be inactive and will not work at any of the doors in the system regardless of the access levels assigned to the card or range of cards.
- *Active* - The card or range of cards will be active and will work at any of the doors in the system that the access levels assigned to the card or range of cards allow.
- *Date Based*- The card or range of cards will become active at midnight on the date entered in the active date field and will become inactive at midnight on the date entered in the expire date field.

## ACCESS LEVELS

Select up to six access levels to be assigned to the card or range of cards being added to the database. The access levels are used to determine when and where a card will be allowed access to a door or group of doors. For more information on access levels, see the [Access Levels](#) help file topic.

## BADGE TYPE

Select the badge type to be used for the card or range of cards. Only the badge type(s) that exist in the badge types location folder will be available. For more information on badge types, see the [Badge Types](#) help file topic.

## CAPTURE

The capture button is used to activate the capture window and capture an image or signature for the card holder. The Capture button will use the default capture device on your system. This device must be Microsoft DirectShow compatible. For information regarding the capture device, see the manufacturer's documentation for the capture device being used.

The style and functionality of the capture window will vary depending upon the type of capture device being used. See the manufacturer's documentation for the capture device for further information about the capture window.



## CAPTURE TOOLS

The image capture tools button is used to bring up a tools menu for image or signature capturing. The following tools are available:

- *Cut* - The cut option is used to delete the current image and copy it to the clipboard. This option is useful for either deleting an unwanted image from a card holder, or for moving an image to the clipboard.
- *Copy* - The copy option is used to copy the current image to the clipboard. This option is useful for copying a card holder image to the clipboard and pasting into an imaging application such as windows paintbrush.
- *Paste* - The paste option is used to paste the contents of the clipboard into the image capture window. This option is useful for capturing images created with a windows paintbrush application, or from another imaging application that does not have TWAIN or VFW software drivers.
- *Import* - The import option is used to capture an image from a physical disk file. This option is useful for capturing images from capture devices that have the capability of storing images to a file. The supported image file formats are JPEG (.JPG) and Windows Bitmap (.BMP).
- *Export* - The export option is used to export a captured image to a physical disk file. This option is useful for exporting images for use with imaging applications that can use disk based image files. The supported image file formats are JPEG (.JPG) and Windows Bitmap (.BMP).
- *Twain* - The Twain option is used to select the TWAIN device source and to acquire (capture) an image from the selected TWAIN source. This option is useful if an image is being captured using a TWAIN device that is not set as the default capture device. For example, if the Integral Technologies FlashBus capture card is the normally used capture device and remote images are captured with a digital camera, the TWAIN option could be used to gather the images from the camera without having to run the configuration program to change the default image capture device. **The TWAIN sources will vary according to the third party device drivers that are installed on the local workstation.**
- *Adjust Zoom/Brightness/Contrast* - The zoom option is used to zoom in on an image captured from too great a distance. The adjust brightness/contrast option is used to adjust the brightness or contrast (lightness or darkness) of a captured image. This option is useful for enhancing images that were captured under low light conditions. To adjust the brightness and or contrast, use the up/down arrows to increase or decrease the brightness or contrast of the image. Click on Save to save the changes to the image or click on Cancel or Restore All to cancel the changes.

## ADDITIONAL USER INFORMATION

Enter the desired additional user information. All of these fields are optional and can be up to 50

characters in length. For more information on the User Information field labels, see the [Cards](#) help file topic.

Only user information fields that have had their label name changed in the Cards data entry screen will appear on this screen. This step will be skipped if all of the user information field labels are left with their default names.

## FINISHED

A summary will be displayed that shows all of the selected card options. If you wish to change any of your selections, simply click the Back button and make any changes desired. Clicking the Finish button will save the card information to the database and the card or range of cards will be sent to the panel. Click Cancel to exit without performing changes.

# ACCESS LEVELS

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Access levels are combinations of timezones and doors that are used to give a card holder access to a door or group of doors during a certain time. There are no pre-defined access levels in Access It! NExT Step.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.

Select any of the following topics for additional information.

[Adding Access Levels](#)

[Editing Access Levels](#)

[Deleting Access Levels](#)



# ADD ACCESS LEVELS



Access levels are combinations of timezones and doors that are used to give a card holder access to a door or group of doors during a certain time. There are no pre-defined access levels in Access It! NExT Step.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.

## ADDING AN ACCESS LEVEL

To add a new access level, first go to the Access Levels data entry screen by either clicking the  Access Levels button within the Data Files group. All of the Access Levels currently in the database will appear in the right window pane of the Access It! NExT Step. Next, click on the  New option on the toolbar to open the New Access Level entry screen.

## ACCESS LEVEL NAME

Enter the name to be used for the new access level. It is recommended that a friendly name be assigned to all of the access levels being created. An example of a friendly name would be "All Doors During Office Hours". The access level name can be up to 50 characters in length.

## DOORS/TIMEZONES

Select the timezone to be used for the selected doors being assigned to the access level. Only one timezone can be selected at a time, so when doors are being assigned for different timezones, they must be selected individually or in groups by the desired timezone. To change a timezone for an assigned door it must be moved back to the available window, then re-assigned with the new timezone. To "move" the doors that you wish to be assigned to the access level from the available window to the assigned window use the ">>", ">", "<", and "<<" buttons. The ">>" button will move all doors from the available window to the assigned window. The "<<" button will move all doors from the assigned window to the available window. Multiple doors can be selected by holding down the <Ctrl> key on the keyboard while selecting (clicking) the desired doors. The ">" button will move only the highlighted doors from the available window to the assigned window. The "<" button will move only the highlighted doors from the assigned window to the available window.

## OK/CANCEL BUTTONS

Clicking on the OK button will save the changes to the access level. Clicking on the Cancel button will exit this screen without saving changes.





# EDIT ACCESS LEVELS



Access levels are combinations of timezones and doors that are used to give a card holder access to a door or group of doors during a certain time. There are no pre-defined access levels in Access It! NExT Step.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.

## EDITING AN ACCESS LEVEL

To edit an access level, first go to the Access Levels screen by clicking the  Access Levels button within the Data Files group. All of the Access Levels currently in the database will appear in the right window pane of the Access It! NExT Step. To open the Edit Access Level screen either click on the access level to be edited and then click on the  Edit option on the toolbar, or simply double click on the access level to be edited. Select the timezone to be used for the selected doors being assigned to the access level. Only one timezone can be selected at a time, so when doors are being assigned for different timezones, they must be selected individually or in groups by the desired timezone. To change a timezone for an assigned door it must be moved back to the available window, then re-assigned with the new timezone. To "move" the doors that you wish to be assigned to the access level from the available window to the assigned window use the ">>", ">", "<", and "<<" buttons. The ">>" button will move all doors from the available window to the assigned window. The "<<" button will move all doors from the assigned window to the available window. Multiple doors can be selected by holding down the &lt;Ctrl> key on the keyboard while selecting (clicking) the desired doors. The ">" button will move only the highlighted doors from the available window to the assigned window. The "<" button will move only the highlighted doors from the assigned window to the available window.

## ACCESS LEVEL NAME

Enter the name to be used for the new access level. It is recommended that a friendly name be assigned to all of the access levels being created. An example of a friendly name would be "All Doors During Office Hours". The access level name can be up to 50 characters in length.

## DOORS/TIMEZONES

Select the timezone to be used for the selected doors being assigned to the access level. Only one timezone can be selected at a time, so when doors are being assigned for different timezones, they must be selected individually or in groups by the desired timezone. To change a timezone for an assigned door it must be moved back to the available window, then re-assigned with the new timezone. To "move" the doors that you wish to be assigned to the access level from the available window to the

assigned window use the ">>", ">", "<", and "<<" buttons. The ">>" button will move all doors from the available window to the assigned window. The "<<" button will move all doors from the assigned window to the available window. Multiple doors can be selected by holding down the &lt;Ctrl> key on the keyboard while selecting (clicking) the desired doors. The ">" button will move only the highlighted doors from the available window to the assigned window. The "<" button will move only the highlighted doors from the assigned window to the available window.

## OK/CANCEL BUTTONS

Clicking on the OK button will save the changes to the access level. Clicking on the Cancel button will exit this screen without saving changes.

# DELETE ACCESS LEVELS



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Access levels are combinations of timezones and doors that are used to give a card holder access to a door or group of doors during a certain time. There are no pre-defined access levels in Access It! NExT Step.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.

## DELETING AN ACCESS LEVEL

To delete an access level, go to the Access Levels screen by clicking the  Access Levels button within the Data Files group. All of the Access Levels currently in the database will appear in the right window pane of the Access It! NExT Step desktop. Select the access level to be deleted and click on the  Delete button on the toolbar. Confirmation of the deletion will be requested. Click Yes to continue with the deletion, click No to continue without deleting the access level.



# TIMEZONES



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Timezones are used to determine when a card holder has access to a door, or when a door is to be unlocked. All timezones have 4 intervals that can be set up to accommodate varying time schedules on different days of the week. Access It! NExT Step comes with 2 pre-defined timezones in the database. The Always timezone has the pre-defined interval 1, which assigns 24 hours a day to all days of the week excluding holidays. The Never timezone has no pre-defined intervals and will never allow access to, or unlock any doors during any days of the week. This timezone is used in the Access Levels data entry screen to not allow access to a door or group of doors.

The names of the Always and Never timezones can be changed but the data cannot be edited and these timezones cannot be deleted.

Click on any of the following topics for additional information:

[Add a Timezone](#)

[Edit a Timezone](#)

[Delete a Timezone](#)



# ADD A TIMEZONE



Timezones are used to determine when a card holder has access to a door, or when a door is to be unlocked. All timezones have 4 intervals that can be set up to accommodate varying time schedules on different days of the week. Access It! NExT Step comes with 2 pre-defined timezones in the database. The Always timezone has the pre-defined interval 1, which assigns 24 hours a day to all days of the week excluding holidays. The Never timezone has no pre-defined intervals and will never allow access to, or unlock any doors during any days of the week. This timezone is used in the Access Levels data entry screen to not allow access to a door or group of doors.

The names of the Always and Never timezones can be changed but the data cannot be edited and these timezones cannot be deleted.

## ADDING A TIMEZONE

To add a timezone, go to the Timezones screen by either clicking the  Timezones button within the Data Files group. Any timezones currently in the database will then be displayed in the right window pane of the Access It! NExT Step. Next, click the  New button on the toolbar.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.

## TIMEZONE NAME


Enter the name to be used for this timezone. It is recommended that a friendly name be assigned to all of the timezones being used. An example of a friendly name would be "Office Hours". The timezone name can be up to 50 characters in length.

## INTERVALS

Select the days of the week to be used for each of the 4 intervals. Only 1 interval needs to be set up to enable a timezone, but all 4 can be used if desired. Enter the appropriate start time and end time for any of the intervals being used. The start time is when the timezone will become active and the end time is when the timezone will become inactive. For example, if a door has an unlock during timezone set to a timezone that has a start time of 08:00 AM and an end time of 05:00 PM, then the door will be unlocked from 08:00 AM to 05:00 PM.

When the H or holiday day of the week is selected within an interval, an entry must be made within the holidays data entry screen to define any dates as holidays that are to be included within this interval.

## PRINT

To print/view a list of all Timezones including all intervals, click on the  Print button. A listing of all Timezones with all intervals will pop up in a new window and can be printed from this location.

## OK/CANCEL BUTTONS

Clicking the OK button will save the changes made to the timezone. Clicking the Cancel button will not save the changes made to the timezone.




# DELETE A TIMEZONE



Timezones are used to determine when a card holder has access to a door, or when a door is to be unlocked. All timezones have 4 intervals that can be set up to accommodate varying time schedules on different days of the week. Access It! NExT Step comes with 2 pre-defined timezones in the database. The Always timezone has the pre-defined interval 1, which assigns 24 hours a day to all days of the week excluding holidays. The Never timezone has no pre-defined intervals and will never allow access to, or unlock any doors during any days of the week. This timezone is used in the Access Levels data entry screen to not allow access to a door or group of doors.

The names of the Always and Never timezones can be changed but the data cannot be edited and these timezones cannot be deleted. Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic

## DELETING A TIMEZONE

First, go to the Timezones screen by clicking the  Timezones button within the Data Files group. Any timezones currently in the database will then be displayed in the right window pane of the Access It! NExT Step. Timezones other than the Always and Never timezones may be deleted. Timezones for which deletion is permitted will be indicated by the  Delete button being active or not grayed out when that timezone is selected. To delete a timezone, select that timezone and click the  Delete button on the toolbar. Confirmation of the deletion will be requested. Click Yes to continue with the deletion, click No to continue without deleting the timezone.



# EDIT A TIMEZONE



Timezones are used to determine when a card holder has access to a door, or when a door is to be unlocked. All timezones have 4 intervals that can be set up to accommodate varying time schedules on different days of the week. Access It! NExT Step comes with 2 pre-defined timezones in the database. The Always timezone has the pre-defined interval 1, which assigns 24 hours a day to all days of the week excluding holidays. The Never timezone has no pre-defined intervals and will never allow access to, or unlock any doors during any days of the week. This timezone is used in the Access Levels data entry screen to not allow access to a door or group of doors.

The names of the Always and Never timezones can be changed but the data cannot be edited and these timezones cannot be deleted.

## EDITING A TIMEZONE

To edit a timezone, go to the Timezones screen by clicking the  Timezones button within the Data Files group. All of the timezones in the database will then be displayed in the right window pane of the Access It! NExT Step desktop. Select the timezone to be edited and click on the  Edit button on the toolbar or double click the timezone to be edited.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.

## TIMEZONE NAME


Enter the name to be used for this timezone. It is recommended that a friendly name be assigned to all of the timezones being used. An example of a friendly name would be "Office Hours". The timezone name can be up to 50 characters in length.

## INTERVALS

Select the days of the week to be used for each of the 4 intervals. Only 1 interval needs to be set up to enable a timezone, but all 4 can be used if desired. Enter the appropriate start time and end time for any of the intervals being used. The start time is when the timezone will become active and the end time is when the timezone will become inactive. For example, if a door has an unlock during timezone set to a timezone that has a start time of 08:00 AM and an end time of 05:00 PM, then the door will be unlocked from 08:00 AM to 05:00 PM.

When the H or holiday day of the week is selected within an interval, an entry must be made within the holidays data entry screen to define any dates as holidays that are to be included within this interval.

## PRINT

To print/view a list of all Timezones including all intervals, click on the  Print button. A listing of all Timezones with all intervals will pop up in a new window and can be printed from this location.

## OK/CANCEL BUTTONS

Clicking the OK button will save the changes made to the timezone. Clicking the Cancel button will not save the changes made to the timezone.

# HOLIDAYS

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Holidays are used to define specified dates as holidays. Holidays can be used within timezone intervals to control whether a timezone will be active or inactive on that holiday. A day becomes a holiday instead of the day of the week in a timezone interval when the specified holiday date matches the current system date.

For more detailed information, select one of the following topics:

[Add A Holiday](#)

[Edit A Holiday](#)

[Delete A Holiday](#)

# ADD A HOLIDAY



Holidays are used to define specified dates as holidays. Holidays can be used within timezone intervals to control whether a timezone will be active or inactive on that holiday. A day becomes a holiday instead of the day of the week in a timezone interval when the specified holiday date matches the current system date.

## ADDING A HOLIDAY

To add a holiday, go to the Holidays data entry screen by either clicking the Holidays button within the Data Files group on the toolbar. Any holidays currently in the database will then be displayed in the right window pane of the Access It! NExT Step. Next, click on the New button on the toolbar.

**Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.**

## HOLIDAY NAME

Enter the name to be used for this holiday. It is recommended that a friendly name be assigned to all of the holidays being used. An example of a friendly name would be "Thanksgiving". The holiday name can be up to 50 characters in length.

## HOLIDAY DATE

When the New Holiday entry screen opens, the default Holiday Date is the current date. Manually enter the desired date or use the drop down box to select the desired Holiday Date.

**Any dates defined as holidays will automatically override as a holiday instead of the day of the week within any timezones that have holidays defined.**

## HOLIDAY REPORT

To print/preview a listing of holidays currently in the system, either click on the Print button on the toolbar. A fully formatted report will pop up in a new window with the following fields: Holiday Name and Holiday Date.

## OK/CANCEL BUTTONS

Clicking the OK button will save the changes made to the holiday. Clicking on the Cancel button will not save the changes made to the holiday.







# DELETE A HOLIDAY



Holidays are used to define specified dates as holidays. Holidays can be used within timezone intervals to control whether a timezone will be active or inactive on that holiday. A day becomes a holiday instead of the day of the week in a timezone interval when the specified holiday date matches the current system date.

## DELETING A HOLIDAY

First, go to the Holidays data entry screen by clicking the  Holidays button within the Data Files group on the toolbar. Any holidays currently in the database will then be displayed in the right window pane of the Access It! NExT Step.

To delete a holiday, select the holiday and then click on the  Delete button on the toolbar. Confirmation of the deletion will be requested. Click Yes to continue with the deletion, click No to exit without deleting.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.

# EDIT A HOLIDAY



Holidays are used to define specified dates as holidays. Holidays can be used within timezone intervals to control whether a timezone will be active or inactive on that holiday. A day becomes a holiday instead of the day of the week in a timezone interval when the specified holiday date matches the current system date.

## EDITING A HOLIDAY

To edit a holiday, go to the Holidays data entry screen by clicking the Holidays button within the Data Files group on the toolbar. All of the holidays in the database will then be displayed in the right window pane of the Access It! NExT Step . Next, select the holiday to be edited and then either click on the Edit button on the toolbar, or simply double click the holiday to be edited.

**Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.**

## HOLIDAY NAME

Enter the name to be used for this holiday. It is recommended that a friendly name be assigned to all of the holidays being used. An example of a friendly name would be "Thanksgiving". The holiday name can be up to 50 characters in length.

## HOLIDAY DATE

When the New Holiday entry screen opens, the default Holiday Date is the current date. Manually enter the desired date or use the drop down box to select the desired Holiday Date.

**Any dates defined as holidays will automatically override as a holiday instead of the day of the week within any timezones that have holidays defined.**

## HOLIDAY REPORT

To print/preview a listing of holidays currently in the system, either click on the Print button on the toolbar. A fully formatted report will pop up in a new window with the following fields: Holiday Name and Holiday Date.

## OK/CANCEL BUTTONS

Clicking the OK button will save the changes made to the holiday. Clicking on the Cancel button will not save the changes made to the holiday.



# USERS



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The Users data file is used to define system operators, passwords and security settings. Access permissions can be set up that will control the level of access the user will have to all of the data files, hardware and utilities within the system. Access It! NExT Step comes with 1 pre-defined user in the database. The "Admin" user has been granted access to all areas of the system and should only be used by experienced users. It is recommended that a user be set up for each operator that will be using the system. All editing, deleting and adding of data in the system is recorded in the events file along with the name of the user that performed the action. This is useful for tracking data updates within the system and who performed them.

**It is strongly recommended that a password be assigned to the "Admin" user as soon as the software is installed. The "Admin" user has access to all screens and areas in the system and should only be used by experienced users.**

Select any of the following topics for more detailed information.

[Add A User](#)

[Edit A User](#)

[Delete A User](#)

# ADD A USER



The Users data file is used to define system operators, passwords and security settings. Access permissions can be set up that will control the level of access the user will have to all of the data files, hardware and utilities within the system. Access It! NExT Step comes with 1 pre-defined user in the database. The "Admin" user has been granted access to all areas of the system and should only be used by experienced users. It is recommended that a user be set up for each operator that will be using the system. All editing, deleting and adding of data in the system is recorded in the events file along with the name of the user that performed the action. This is useful for tracking data updates within the system and who performed them.

**It is strongly recommended that a password be assigned to the "Admin" user as soon as the software is installed. The "Admin" user has access to all screens and areas in the system and should only be used by experienced users.**

## ADDING A USER

To add a user, go to the Users data entry screen by either clicking the Users button within the Data Files group. All of the users in the database will then be displayed in the right window pane of the Access It! NExT Step. Next go to System Menu | Users | New to open the New User data entry screen.

**Access to this screen is determined by the settings for the currently logged in user.**

## USER NAME

Enter the name to be used for this user. The user name can be up to 50 characters in length.

## DATA FILE PERMISSIONS

Select a permission for each of the data files listed. The following permissions are supported:

- *No Access* - The user will not be allowed access to the selected data file. No button will appear on the toolbar and no item will exist on the system menu for the data file.
- *View Only* - The user will be allowed to view information for the selected data file. Data cannot be added, changed or deleted in the selected data file.
- *Full Access* - The user will have full access to the selected data file. Data can be added, changed or deleted in the selected data file.

## HARDWARE PERMISSIONS

Select a permission for each of hardware types listed. The following permissions are supported:

- *No Access* - The user will not be allowed access to the selected hardware. No button will appear on the toolbar and no item will exist on the system menu for the selected hardware type.
- *View Only* - The user will be allowed to view information for the selected data file. Hardware profiles for the selected hardware cannot be added, changed or deleted in the selected hardware.
- *Full Access* - The user will have full access to the selected hardware type. Hardware profiles can be added, changed or deleted for the selected hardware type.

## UTILITIES PERMISSIONS

Select (check) this option to allow the user access to the selected utility. De-select (uncheck) this option to prevent the user from accessing the selected utility. No button will appear on the toolbar and no item will exist on the system menu for the utility if the user does not have access to it.

## OK/CANCEL BUTTONS

Clicking on the OK button will save the changes made to the user. Clicking on the Cancel button will not save the changes made to the user.

## SETTING A PASSWORD

To set a password for a user, select Options from the upper right menu and select Change Password. It will be required to supply the old password (defaults to none).

To change the password, select Options from the upper right menu and select Change Password. It will be required to enter the old password and enter the new password twice to confirm.



# DELETE A USER



The Users data file is used to define system operators, passwords and security settings. Access permissions can be set up that will control the level of access the user will have to all of the data files, hardware and utilities within the system. Access It! NExT Step comes with 1 pre-defined user in the database. The "Admin" user has been granted access to all areas of the system and should only be used by experienced users. It is recommended that a user be set up for each operator that will be using the system. All editing, deleting and adding of data in the system is recorded in the events file along with the name of the user that performed the action. This is useful for tracking data updates within the system and who performed them.

**It is strongly recommended that a password be assigned to the "Admin" user as soon as the software is installed. The "Admin" user has access to all screens and areas in the system and should only be used by experienced users.**

## DELETING A USER

To delete a user, go to the Users data entry screen by clicking the  Users button within the Data Files group. All of the users in the database will then be displayed in the right window pane of the Access It! NExT Step desktop. Select the user to be deleted and click on the  Delete button on the toolbar. Click Yes to confirm and continue with the deletion, click No to exit without deleting the user.

**Access to this screen is determined by the settings for the currently logged in user.**



# EDIT A USER



The Users data file is used to define system operators, passwords and security settings. Access permissions can be set up that will control the level of access the user will have to all of the data files, hardware and utilities within the system. Access It! NExT Step comes with 1 pre-defined user in the database. The "Admin" user has been granted access to all areas of the system and should only be used by experienced users. It is recommended that a user be set up for each operator that will be using the system. All editing, deleting and adding of data in the system is recorded in the events file along with the name of the user that performed the action. This is useful for tracking data updates within the system and who performed them.

**It is strongly recommended that a password be assigned to the "Admin" user as soon as the software is installed. The "Admin" user has access to all screens and areas in the system and should only be used by experienced users.**

## EDITING A USER AND SETTING A PASSWORD

To edit a user, go to the Users data entry screen by clicking the Users button within the Data Files group. All of the users in the database will then be displayed in the right window pane of the Access It! NExT Step desktop. Select the user to be edited and click on the Edit button on the toolbar or double click the user to be edited to open the Edit User data entry screen.

To set a password for a user, select Options from the upper right menu and select Change Password It will be required to supply the old password (defaults to none).

To change the password, select Options from the upper right menu and select Change Password. It will be required to enter the old password and enter the new password twice to confirm.

**Access to this screen is determined by the settings for the currently logged in user.**

## USER NAME

Enter the name to be used for this user. The user name can be up to 50 characters in length.

## DATA FILE PERMISSIONS

Select a permission for each of the data files listed. The following permissions are supported:

- *No Access* - The user will not be allowed access to the selected data file. No button will appear on the toolbar and no item will exist on the system menu for the data file.

- *View Only* - The user will be allowed to view information for the selected data file. Data cannot be added, changed or deleted in the selected data file.
- *Full Access* - The user will have full access to the selected data file. Data can be added, changed or deleted in the selected data file.

## HARDWARE PERMISSIONS

Select a permission for each of hardware types listed. The following permissions are supported:

- *No Access* - The user will not be allowed access to the selected hardware. No button will appear on the toolbar and no item will exist on the system menu for the selected hardware type.
- *View Only* - The user will be allowed to view information for the selected data file. Hardware profiles for the selected hardware cannot be added, changed or deleted in the selected hardware.
- *Full Access* - The user will have full access to the selected hardware type. Hardware profiles can be added, changed or deleted for the selected hardware type.

## UTILITIES PERMISSIONS

Select (check) this option to allow the user access to the selected utility. De-select (uncheck) this option to prevent the user from accessing the selected utility. No button will appear on the toolbar and no item will exist on the system menu for the utility if the user does not have access to it.

## OK/CANCEL BUTTONS


Clicking on the OK button will save the changes made to the user. Clicking on the Cancel button will not save the changes made to the user.

# ALARMS



Alarms are events (transactions) that are recorded in the event file and displayed in the Alarms window every time an event occurs for a card or hardware device that has event types defined as an alarm. Alarms are generally used to monitor inputs that have devices such as smoke detectors attached to them. Alarms are also used to monitor doors being forced open etc.

## VIEWING ALARMS

To view alarms, go to the Alarms screen by clicking on the  Alarms button within the Data Files group on the toolbar. All of the alarms in the database will then be displayed in a new browser window. **Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic. If the currently logged in user does not have access to the alarms screen, no alarms will be received at the workstation while that user is logged in.**

## PENDING ALARMS

Pending alarms are alarms that have not been acknowledged by any user. All events that occur that have their event types set to alarm will be displayed in this window. Pending alarms are sorted first by alarm priority, then by the date and time that they occurred. Event reporting occurs automatically for all cards in the database.

**Only event types that have their reporting mode set to alarm will be displayed in the Alarms window. Event Reporting can be set up for the following hardware types: Panels, Subpanels, Inputs, Outputs, and Door. For more information on setting reporting modes of any of these hardware types, click on any of their corresponding help topics. [Panel](#) [Subpanels](#) [Inputs](#) [Outputs](#) [Doors](#)**

## ACKNOWLEDGING ALARMS

To acknowledge an alarm, select the alarm to be acknowledged and click on the Acknowledge button on the toolbar or, with the cursor in the Alarms window, click the right mouse button and select Acknowledge. Multiple alarms can be acknowledged at the same time by holding down the <CTRL> key while selecting the alarms to be acknowledged then clicking the Acknowledge button on the toolbar. Once the alarm has been acknowledged, it will be removed from the Alarms window.

## SILENCE

If you do not wish to have an audible alarm, click the Silence button or, with the cursor in the Alarms window, click the right mouse button and select Silence.



# PANEL



Panel is used to define the model and operational parameters for the intelligent control panel in the system. Access It! NEXt Step permits the use of only a single panel.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.

## EDITING A PANEL

To edit the panel click on the Hardware tab and then select the  Panel toolbar button. To open the Edit Panel data entry screen, click on the Panel to be edited and click on the  Edit option on the toolbar, or simply double click on the Panel to edit it.

## PANEL NAME

Enter the name to be used for the panel. It is recommended that a friendly name be assigned to the panel. An example of a friendly name would be "Main Building Panel". The panel name can be up to 50 characters in length.

## SUBPANEL PORT SPEED

Select the subpanel comm port speed. This is the baud rate at which the panel will communicate with the subpanels.

## EVENT REPORTING CONDITIONS

Panel events may be recorded in the event file when there is a communication, tamper, or power change of state for the panel dependent upon how event reporting is configured. The following event types may be recorded.

- *Comm Loss* - This occurs when communication between the server computer and the panel has been lost or can be caused when the panel is reset.
- *Comm Restore* - This occurs when communication between the server computer and the panel has been restored.
- *Tamper Abnormal* - This occurs when the tamper device for the panel is reporting that it has been tampered with/
- *Tamper Normal* - This occurs when the tamper device for the panel is reporting that it has been restored to a normal state.

- *Power Fault* - This occurs when the panel is reporting that it has lost power.
- *Power Normal* - This occurs when the panel is reporting that power has been restored to a normal condition.

## EVENT REPORTING OPTIONS

- *Alarm* - Panel events for this event type will be recorded in the event file and displayed in the alarms window.
- *Event* - Panel events for this event type will be recorded in the event file and displayed in the events window.
- *Disregard* - Panel events for this event type will not be recorded in the event file and will not be displayed in either the events window or alarms window.

## SENDING COMMANDS TO THE PANEL

Commands can be sent to the panel by clicking on the panel and going to System Menu Panel and then selecting the command to be sent or by going to the Request Status drop down box on the menu and clicking on the desired command. The following commands can be sent to the panel:

- *Request Status* - The request status command is used to view current status information for the panel. This tool can be useful for troubleshooting system problems and is for general informational purposes. The following information is displayed:
  - *Panel Name* - Displays the name of the panel.
  - *Device ID* - Displays the device ID or panel number.
  - *Device Version* - Displays the hardware version of the panel.
  - *Software Version* - Displays the current firmware version of the panel.
  - *Serial #* - Displays the serial # of the panel.
  - *RAM Size* - Displays the total amount of on board memory for the panel.
  - *RAM Free* - Displays the amount of available on board memory for the panel.
  - *Panel Date/Time* - Displays the date/time for the panel.
  - *Max Cards* - Displays the maximum card capacity of the panel.
  - *Active Cards* - Displays the current number of cards stored in the panel.
  - *Dip Switch at Powerup* - Displays the DIP switch settings when power was applied to the panel.
  - *Dip Switch Current* - Displays the current DIP switch settings for the panel.
  - *Power State* - Displays the current state of the power failure input.
  - *Tamper State* - Displays the current state of the tamper input.
  - *OEM Code* - Displays the current OEM code number for the panel.
- *Download Firmware* - The download firmware command is used to download firmware to the

panel.

Downloading firmware can be very complex and is only recommended to be used by advanced users with the assistance of the Access It! NExT Step technical support staff. Sending an invalid firmware file can compromise the security and functionality of the system.

- *Reset Panel* - The reset panel command will cause the panel to reset and will re-initialize the panel's on-board database. All of the data files will then automatically be downloaded from the comm server computer to the panel.
- *Direct Command* - Direct commands are used to send direct numeric commands to the panel. Direct commands are used for diagnostic purposes only and should never be used for the daily operation of the system. There are many direct commands available and discussing them here is beyond the scope of this documentation. For additional information on Direct Commands, see the [Direct Commands](#) help file topic.

Direct commands can be very complex and are only recommended to be used by advanced users with the assistance of the Access It! NExT Step technical support staff. Sending an invalid direct command can compromise the security and functionality of the system.

## OK/CANCEL BUTTONS

Clicking on the OK button will save the changes made to the Panel. Clicking on the Cancel button will not save the changes made to the Panel.



# SUBPANELS

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Subpanels are used to define the model, type, and operational parameters for the SIO subpanels attached to the panel. Once attached to the panel, the subpanels will automatically be auto-detected by Access It! NExT Step.

## EDITING A SUBPANEL

To edit a subpanel click on the Hardware tab and then select the  Subpanels toolbar button. To open the Edit Subpanel data entry screen, either click on the subpanel to be edited and click on the  Edit option on the toolbar, or simply double click on the Subpanel to edit it.

## SUBPANEL NAME

Enter the name to be used for the subpanel. It is recommended that a friendly name be assigned to the subpanel. An example of a friendly name would be "Main Building Subpanel". The Subpanel name can be up to 50 characters in length.

## SUBPANEL TYPE

Select the model for this subpanel.

**It is very important that the subpanel model selected matches the model of the subpanel being installed. Choosing the wrong subpanel model could result in system malfunctions.**

## SUBPANEL ADDRESS

This is the physical hardware address of the subpanel. The address can be determined by the default name assigned to the subpanel.

**The address must match the DIP switch settings on the subpanel.**

## EVENT REPORTING CONDITIONS

Subpanel events may be recorded in the event file when there is a communication, tamper, or power change of state for the subpanel dependent upon how event reporting is configured. The following event types may be recorded.

- *Comm Loss* - This occurs when communication between the server computer and the subpanel has been lost or can be caused when the subpanel is reset.
- *Comm Restore* - This occurs when communication between the server computer and the subpanel

has been restored.

- *Tamper Abnormal* - This occurs when the tamper device for the subpanel is reporting that it has been tampered with/
- *Tamper Normal* - This occurs when the tamper device for the subpanel is reporting that it has been restored to a normal state.
- *Power Fault* - This occurs when the subpanel is reporting that it has lost power.
- *Power Normal* - This occurs when the subpanel is reporting that power has been restored to a normal condition.

## EVENT REPORTING OPTIONS

- *Alarm* - Subpanel events for this event type will be recorded in the event file and displayed in the alarms window.
- *Event* - Subpanel events for this event type will be recorded in the event file and displayed in the events window.
- *Disregard* - Subpanel events for this event type will not be recorded in the event file and will not be displayed in either the events window or alarms window.

## SENDING COMMANDS TO THE SUBPANEL

Commands can be sent to the a subpanel by clicking on the subpanel and going to System Menu Subpanels and then selecting the command to be sent or by going to the Request Status drop down box on the menu and clicking on the desired command. The following commands can be sent to subpanels:

- *Request Status* - The request status command is used to view current status information for a subpanel. This tool can be useful for troubleshooting system problems and is for general informational purposes. The following information is displayed:
  - *Subpanel Name* - Displays the name of the subpanel.
  - *Downstream Port #* - Displays the device ID or panel number.
  - *Comm Status* - Displays the communication status of the subpanel. This is the status of the communication between the subpanel and panel.
  - *Retry Count* - Displays the communication retry count. A high number here could indicate a wiring problem between the subpanel and the panel.
  - *Tamper Status* - Displays the status of the tamper device for the subpanel.
  - *Power Status* - Displays the status of the power monitoring device for the subpanel.
  - *Model* - Displays the model number of the subpanel.
  - *Revision* - Displays the firmware revision number of the subpanel.
  - *Serial Number* - Displays the serial number of the subpanel.
  - *OEM Code* - Displays the current OEM code number for the subpanel.



- *Download Firmware* - The download firmware command is used to download firmware to the selected subpanel.

Downloading firmware can be very complex and is only recommended to be used by advanced users with the assistance of the Access It! NExT Step technical support staff. Sending an invalid firmware file can compromise the security and functionality of the system.

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## OK/CANCEL BUTTONS

Clicking on the OK button will save the changes made to the Input. Clicking on the Cancel button will not save the changes made to the Input.

# DOORS

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Doors are used to define readers within the system. Each door being used must have a corresponding SIO panel attached, along with the correct reader type for the card format selected during configuration. Each door supports a door strike, a door contact and an egress (request to exit) button.

Doors cannot be deleted from, or added to the database; however, when a piece of hardware is added to the system that has readers associated with it, they will be auto-detected by the system. The only way to "delete" a door is to delete the subpanel that contains that door.

Select any of the following topics for additional information:

[Edit a Door](#)

[Send a Command to a Door](#)

[View a Door's Status](#)




# EDIT A DOOR



Doors are used to define readers within the system. Each door being used must have a corresponding SIO panel attached, along with the correct reader type for the card format selected during configuration. Each door supports a door strike, a door contact and an egress (request to exit) button.

Doors cannot be deleted from, or added to the database; however, when a piece of hardware is added to the system that has readers associated with it, they will be auto-detected by the system. The only way to "delete" a door is to delete the subpanel that contains that door.

## EDITING A DOOR

To edit a door, go to the Hardware group then click on the  Doors button. All of the doors in the database will then be displayed in the right window pane of the Access It! NExT Step desktop. To open the Edit Door data entry screen, either select the door to be edited and click on the  Edit button on the toolbar or double click the door to be edited or click the right mouse button and select  Edit. For more information about door status icons, see the [Door Status](#) help topic.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.

## DOOR NAME

Enter the name to be used for this door. All of the doors have pre-defined names that can be used if desired. It is recommended however, that a friendly name be assigned to all of the doors being used. An example of a friendly name would be "Front Door". The door name can be up to 50 characters in length.

## STANDARD DOOR TIMES

Use the up/down arrows to enter the unlock time and the allowed open time fields for this door. The unlock time is the amount of time that the door will remain unlocked after a valid card has been presented, or an access granted command has been issued. The allowed open time is the amount of time that the door can be open after a valid card has been presented, or an access granted command has been issued. The unlock time can range from 1-255 seconds and the allowed open time can range from 1-511 seconds.

## EXTENDED DOOR TIMES

Use the up/down arrows to enter the extended unlock time and the extended allowed open time fields for this door. The extended unlock time is the extended amount of time that the door will remain

unlocked after a valid card has been presented. The standard door time and extended door time are mutually exclusive. In other words, the extended door time is NOT added on to the standard unlock time for cards that have the extended access times option checked. The extended unlock time can range from 1-255 seconds and the extended allowed open time can range from 1-511 seconds.

## DEFAULT READER MODE

Select the reader mode for this door. The reader mode sets the manner in which a reader will respond to a card being presented. The following reader modes are supported:

- *Disabled* - The door will be locked and the reader will not grant access to any cards, even if they have a valid access level for this door. This mode is generally used when access to an area is not desired due to construction hazards, etc.
- *Unlocked* - The door will be unlocked.
- *Facility Code Only* - The door will be locked and any card with a valid facility code will be granted access to the door at any time. The card does not require a valid access level to be granted access in this mode.
- *Card Only* - The door will be locked and only cards with valid facility codes and access levels will be granted access in this mode.
- *PIN Only* - The door will be locked and any valid PIN number entered will be granted access in this mode. No card needs to be presented in order to gain access when the reader is in this mode. All PIN numbers must be unique in the database. The system DOES NOT check for PIN number uniqueness. This option is supported for readers with keypads only.
- *Card And PIN* - The door will be locked and only cards with valid facility codes and access levels will be granted access in this mode. A PIN number entry that matches the card number's PIN number field will also be required at the reader's keypad. This option is supported for readers with keypads only.
- *Card or PIN* - The door will be locked and only cards with valid facility codes and access levels or valid PIN numbers will be granted access in this mode. All PIN numbers must be unique in the database. The system DOES NOT check for PIN number uniqueness. This option is supported for readers with keypads only.

The reader mode will take effect whenever a change is made to any door's settings, or when the panel has been reset or lost power. Any door commands sent to a door will only result in a temporary reader mode change. For more information about door commands, see the [Door Commands](#) help topic.

## DOOR CONTACT CONFIGURATION

Select the door contact configuration for this door. This option will depend upon the type of hardware being installed for the door contact input. The following options are supported:

- *Normally Closed* - This option should be used when the door contact is wired in a normally closed configuration.
- *Normally Open* - This option should be used when the door contact is wired in a normally open configuration.

## REQUEST TO EXIT CONFIGURATION

Select the request to exit (egress) configuration for this door. This option will depend upon the type of hardware being installed for the request to exit input. The following options are supported:

- *Normally Closed* - This option should be used when the request to exit is wired in a normally closed configuration.
- *Normally Open* - This option should be used when the request to exit is wired in a normally open configuration.

## RELOCK MODE

Select the strike relock mode for this door. The following options are supported:

- *After Unlock Time* - The door strike will be re-locked after the unlock time passes. If the card presented has the extended access times option checked, the door strike will re-lock after both the unlock time and the extended unlock times have passed.
- *When Door Opens* - The door strike will be re-locked as soon as the door has opened or after the unlock time passes, whichever occurs first.
- *When Door Closes* - The door strike will be re-locked as soon as the door has closed or after the unlock time passes, whichever occurs first.

## STRIKE MODE

Select the strike configuration for this door. This option will depend upon the type of hardware being installed for the door strike output. The following options are supported:

- *Normally Open* - This option should be used when the door strike is wired in a normally open configuration.
- *Normally Closed* - This option should be used when the door strike is wired in a normally closed configuration.

## UNLOCK DURING TIMEZONE

Select the timezone that this door should be unlocked during. The door will be unlocked at the start time of the selected timezone and re-locked at the end time of the selected timezone, during any of the days specified in any of the intervals within the selected timezone.

## DON'T PULSE STRIKE ON REQUEST TO EXIT

Select the pulse strike setting for the request to exit. If this option is selected (checked), the door strike will not be activated when a request to exit device has been activated. If this option is not selected (unchecked), the door strike will be activated when a request to exit device has been activated.

## EVENT REPORTING

Reader events (transactions) are recorded in the event file every time there is a card presented at the reader. Reader events can also be displayed in the events window or produce a system alarm. For more information on events, see the [Events](#) help file topic. For more information on alarms, see the [Alarms](#) help file topic.

- *Access Granted* - A card has been presented at the reader and access has been granted to the door.
- *Access Denied Reader Disabled* - A card has been presented at the reader and access has been denied because the card reader is in the disabled mode.
- *Access Denied Invalid Facility Code* - A card has been presented at the reader and access has been denied because the facility code on the card presented is not one of the correct facility codes for the system.
- *Access Denied Unknown Card* - A card has been presented at the reader and access has been denied because the card presented is not in the cards data file.
- *Access Denied Card Inactive* - A card has been presented at the reader and access has been denied because the card presented is inactive in the cards data file.
- *Access Denied Card Not Yet Active* - A card has been presented at the reader and access has been denied because the card presented is using date based activation and has not reached the active date specified in the cards data file.
- *Access Denied Card Expired* - A card has been presented at the reader and access has been denied because the card presented is using date based activation and has passed the expiration date specified in the cards data file.
- *Access Denied Wrong PIN Number* - A card has been presented at the reader and access has been denied because the PIN number entered for the card presented does not match the PIN number assigned to the card in the cards data file.
- *Access Denied Wrong Time* - A card has been presented at the reader and access has been denied because the card presented is not allowed access to this door at this time. This is determined by the access levels assigned to the card in the cards data file.
- *Access Denied Never Allowed* - A card has been presented at the reader and access has been

denied because the card presented is not allowed access to this door at any time. This is determined by the access levels assigned to the card in the cards data file.


- *Door Forced Open* - The door has been forced open without either a valid card being presented or an access granted command being sent to the reader.
- *Door Held Open* - The door has been open longer than the allowed open time setting for this reader.
- *Door Closed* - The door has been closed.
- *Door Opened* - The door has been opened.
- *Reader Mode Change* - The mode of the Reader has changed.
- *Reader Offline* - The Reader is offline.

## ANNUNCIATION TYPE

This dictates how the above event types will be handled.

- *Alarm* - Reader events (transactions) for this event type will be recorded in the event file and displayed in the Alarms window.
- *Event* - Reader events (transactions) for this event type will be recorded in the event file and displayed in the Events window.
- *Disregard* - Reader events (transactions) for this event type will not be recorded in the Event file and not displayed in either the Events window or in the Alarms window.

## DOOR REPORT OPTIONS

To print the various reports available for doors either click on the  Print button on the toolbar. The following report formats are available to preview/print:

- *Door Listing* - This report will list data from the doors data file and does not require selecting a door. The following fields are included on the report: door name, reader mode, standard unlock time, standard open time, extended unlock time, extended open time and unlock during timezone, panel name, subpanel name, door number. The report is sorted by door name.
- *Access by Door* - This report will list data from the access levels, cards and doors data files and requires selecting a specific door. The following fields are included on the report: card holder name, card number, access level name, and timezone name. The report is sorted by card holder name. This report is useful for finding out who has access to a door.
- *Access Levels by Door* - This report will list data from the access levels, timezones and doors data files and requires selecting a specific door. The following fields are included on the report: access level name and timezone name. The report is sorted by access level name. This report is useful for finding out what access levels have been assigned to a door.

## OK/CANCEL BUTTONS


Clicking on the OK button will save the changes made to the door. Clicking on the Cancel button will not save the changes made to the door.



# DOOR COMMANDS

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Door commands are used to send commands to doors or readers. To send a command to a door, go to the Doors data entry screen by either clicking on the  Doors button within the Hardware group. All of the doors in the database will then be displayed in the right window pane of the Access It! NExT Step desktop. Select the door to send a command to and click on the Grant Access drop down button next to the Refresh button on the toolbar. Select the command to be issued from the list and click on the command button to send the door command.

Door commands can be sent to doors that are offline, however, the commands will not be executed. For more information about door status icons, see the [Door Status](#) help topic.

The following door commands are supported:

## GRANT ACCESS

The door will be unlocked for the amount of time specified in the unlock time field for this door.

## DISABLE

The door will be locked and the reader will not grant access to any cards, even if they have a valid access level for this door. This mode is generally used when access to an area is not desired due to construction hazards, etc.

## UNLOCK

The door will be unlocked.

## FACILITY CODE ONLY

The door will be locked and any card with a valid facility code will be granted access to the door at any time. The card does not require a valid access level to be granted access in this mode.

## CARD ONLY

The door will be locked and only cards with valid facility codes and access levels will be granted access in this mode.

## PIN ONLY

The door will be locked and any valid PIN number entered will be granted access in this mode.

## CARD AND PIN

The door will be locked and only cards with valid facility codes and access levels will be granted access in this mode. A PIN number entry that matches the card number's PIN number field will also be required at the reader's keypad. This option is supported for readers with keypads only.

## SET MODE TO CARD OR PIN


The door will be locked and only cards with valid facility codes and access levels or valid PIN numbers will be granted access in this mode.

Any door commands sent to a door will only result in a temporary reader mode change. To make a permanent change in the reader mode, see the [Doors](#) help file topic.

# DOOR STATUS

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Door status icons are used to visually show the status of any one of the doors in the system. To view the status of a door, go to the doors data entry screen by either clicking on the  Doors button within the Data Files group. All of the Doors in the database will then be displayed in the right window pane of the Access It! Lite.NET.

The Door icons display the following information:

## DOOR OFF-LINE



The Door is in off-line mode. This means that either there is no SIO sub controller panel and reader installed for this door, or that there is a communication or wiring problem. On systems with less than 32 doors installed, this does not indicate a system problem, it is simply showing that the door is off-line or not connected. The fact that the door is open or closed will not be displayed when a door is off-line.

## DOOR ONLINE/CLOSED



The Door is in online mode and is currently closed. This means that communications have been established with the SIO panel and reader installed for this door. The state of the Door icon will change automatically when the state of the door contact changes.

## DOOR ONLINE/OPENED





The Door is in online mode and is currently open. This means that communications have been established with the SIO panel and reader installed for this door. The state of the Door icon will change automatically when the state of the door contact changes.

# INPUTS



Inputs are used to define input points within the system. Each input being used must have a corresponding SIO panel attached, along with the correct number of input panels specified.

## EDITING AN INPUT

To edit an Input click on the Hardware tab and then select the  Inputs toolbar button. All of the inputs in the database will then be displayed in the right window pane of the Access It! NExT Step desktop. To open the Edit Inputs data entry screen, click on the Input to be edited and click on the  Edit option on the toolbar, or simply double click on the Input to be edited.

## SENDING COMMANDS TO AN INPUT

Commands can be sent to an Input by selecting the Input to send a command to by going to the Enable Input drop down option on the toolbar. Select the command to be issued from the list and click on the command text button on the toolbar to send the input command.

*Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.*

## INPUT NAME

Enter the name to be used for this Input. All of the Inputs have pre-defined names that can be used if desired. It is recommended however, that a friendly name be assigned to all of the Inputs being used. An example of a friendly name would be "Main Building - Lobby Smoke Detector". The Input name can be up to 50 characters in length.

## INPUT CONFIGURATION

Select the input configuration for this Input. This option will depend upon the type of hardware being installed for use with the Input. The following options are supported:

- *Normally Open* - This option should be used when the device attached to this Input operates in a normally open configuration.
- *Normally Closed* - This option should be used when the device attached to this Input operates in a normally closed configuration.

## RESPONSE TIME

Select the response time for this input. The response time is the amount of time in between the opening and closing of the device attached to this input. The following response times are supported:

- *Fast* - This option should be used when a device with a fast open/closed cycle is attached to this Input. This option will set the Input sensitivity to high.
- *Normal* - This option should be used when a device with a normal open/closed cycle is attached to this Input. This option will set the Input sensitivity to medium. This is the most commonly used setting.
- *Slow* - This option should be used when a device with a slow open/closed cycle is attached to this Input. This option will set the Input sensitivity to low.

## DISABLE DURING TIMEZONE

Select the timezone during which this Input should be disabled. The Input will be disabled at the start time of the selected timezone and re-enabled at the end time of the selected timezone, during any of the days specified in any of the intervals within the selected timezone. When the Input is disabled, no reporting of events (transactions) will occur from the device attached to the Input.

## REPORT UNSECURE/SECURE CONDITION AS

Select the reporting modes for this input. The reporting mode determines the way in which changes of state for this Input will be reported within the system. The following reporting modes are supported:

- *Alarm*: Input changes of state for this Input will be recorded in the event file and displayed in the alarms window.
- *Event*: Input changes of state for this Input will be recorded in the event file and displayed in the events window.
- *Disregard*: Input changes of state for this Input will not be recorded in the event file, displayed in the events window or in the alarms window.

## OK/CANCEL BUTTONS



Clicking on the OK button will save the changes made to the Input. Clicking on the Cancel button will not save the changes made to the Input.

# OUTPUTS



Outputs are used to define output relays within the system. Each output being used must have a corresponding SIO panel attached, along with the correct number of output panels specified.

## EDITING AN OUTPUT

To edit an Output click on the Hardware tab and then select the  Outputs toolbar button. All of the Outputs in the database will then be displayed in the right window pane of the Access It! NExT Step . To open the Edit Outputs data entry screen, click on the Output to be edited and click on the  Edit option on the toolbar, or simply double click on the Output to be edited.

## SENDING COMMANDS TO AN OUTPUT

Commands can be sent to an Output by selecting the Output to send a command to and going to the Activate Output drop down option on the toolbar. Select the command to be issued from the list and click on the command text button on the toolbar to send the Output command.

*Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.*

## OUTPUT NAME

Enter the name to be used for this Output. All of the Outputs have pre-defined names that can be used if desired. It is recommended however, that a friendly name be assigned to all of the outputs being used. An example of a friendly name would be "Main Building - Disaster Siren". The Output name can be up to 50 characters in length.

## OUTPUT DRIVE MODE

Select the Output drive mode for this output. This option will depend upon the type of hardware being installed for use with the Output. The following options are supported:

- *De-energized when Inactive* - This option should be used when the device attached to this Output operates in a normally open configuration.
- *Energized when Inactive* - This option should be used when the device attached to this Output operates in a normally closed configuration.

## PULSE TIME

Use the up/down arrows or enter the amount of time that this Output will remain activated when it has been pulsed. The pulse time can range from 1 to 99 seconds.

## ACTIVATE DURING TIMEZONE

Select the timezone during which this Output should be activated. The Output will be activated at the start time of the selected timezone and deactivated at the end time of the selected timezone, during any of the days specified in any of the intervals within the selected timezone.

## REPORT ACTIVE/DEACTIVE AS

Select the reporting modes for this Output. The reporting mode determines the way in which changes of state for this Output will be reported within the system. The following reporting modes are supported:

- *Alarm:* Output changes of state for this Output will be recorded in the event file and displayed in the alarms window.
- *Event:* Output changes of state for this Output will be recorded in the event file and displayed in the events window.
- *Disregard:* Output changes of state for this Output will not be recorded in the event file, displayed in the events window or in the alarms window.

## OK/CANCEL BUTTONS

Clicking on the OK button will save the changes made to the Output. Clicking on the Cancel button will not save the changes made to the Output.

# TASKS



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Tasks are used to perform automated actions within the system. Tasks can perform a wide variety of actions, such as, disabling a point during a timezone, changing a reader mode during a timezone and pulsing an output when an input is activated. Tasks can contain multiple steps and perform more than one action at a time. Task execution can either be automatically or manually executed.

Tasks are stored in the panel and will execute regardless whether or not the panel is communicating with the Access It! NExT Step service.

Select any of the following topics for additional information:

[Add A Task](#)

[Edit A Task](#)

[Delete A Task](#)





# ADD A TASK



Tasks are used to perform automated actions within the system. Tasks can perform a wide variety of actions, such as, disabling a point during a timezone, changing a reader mode during a timezone and pulsing an output when an input is activated. Tasks can contain multiple steps and perform more than one action at a time. Task execution can either be automatically or manually executed.

Tasks are stored in the panel and will execute regardless whether or not the panel is communicating with the Access It! NExT Step service.

## ADDING A TASK

To add a task, click on the Hardware tab and then click on  Tasks toolbar button. Any tasks currently in the database will then be displayed in the right window pane of the Access It! NExT Step. Next, click on the  New button on the toolbar .

## TASK NAME

Enter the name to be used for this task. It is recommended that a friendly name be assigned to all of the tasks being used. An example of a friendly name would be "Unlock All Doors". The task name can be up to 50 characters in length.

## EXECUTE CONDITIONS

Select the execute conditions for this task. The execute conditions are the conditions under which this task will be executed while in automatic execute mode. The following execute conditions are supported:

- *Manual Execute Only* - The task will only execute when manually executed.
- *An Input Changes State (secure or unsecure)* - The task will execute each time the selected input changes to the selected state, during the selected timezone.
- *A Door Opens or Closes* - The task will execute each time the selected reader changes to the selected state, during the selected timezone.
- *A Cardholder Presents a Valid Card* - The task will execute each time the selected card transaction is generated at the selected reader, during the selected timezone.
- *A Cardholder Presents an Invalid Card* - The task will execute each time the selected card transaction is generated at the selected reader, during the selected timezone.
- *A Request to Exit is Granted* - The task will execute each time the selected reader is granted a request to exit either by the request to exit device at the panel or by a reader command, during the

selected timezone.

- *A Timezone Starts or Ends* - The task will execute each time the selected timezone starts or ends, during the selected timezone.

## TASK STEPS

Enter the steps (actions) to be performed by this task. Tasks can perform as many steps as desired. Click on the Add Step button and choose from the Available Outputs. Move the desired Outputs to the Selected Outputs using the ">>", ">", "<", and "<<" buttons. The ">>" button will move all Outputs from the available window to the selected window. The "<<" button will move all Outputs from the selected window to the available window. Multiple Outputs can be selected by holding down the &lt;Ctrl> key on the keyboard while selecting (clicking) the desired Outputs. The ">" button will move only the highlighted Outputs from the available window to the selected window. The "<" button will move only the highlighted Outputs from the selected window to the available window. Once the desired Outputs are selected, use the drop down box to select the step to be performed. The following task steps are supported:


- *Enable Input* - The selected input will be enabled and reporting of events (transactions) will occur from the device attached to the input.
- *Disable Input* - The selected input will be disabled and no reporting of events (transactions) will occur from the device attached to the input.
- *Deactivate Output* - The selected output will be deactivated (de-energized).
- *Activate Output* - The selected output will be activated (energized).
- *Pulse Output* - The selected output will be pulsed (activated, then deactivated) for the amount of time specified in the pulse time setting for the task step.
- *Disable Reader* - The selected door will be locked and the reader will not grant access to any cards, even if they have a valid access level or facility code for the selected door.
- *Unlock Reader/Door* - The selected door will be unlocked.
- *Set Reader to Facility Code Only* - The selected door will be locked and any card with a valid facility code will be granted access to the selected door at any time. The card does not require a valid access level to be granted access in this mode.
- *Set Reader to Card Only* - The selected door will be locked and only cards with valid facility codes and access levels will be granted access in this mode.
- *Set Reader to PIN Only* - The door will be locked and any valid PIN number entered will be granted access in this mode. NOTE: All eight digits must be entered when using a PIN number at a reader.
- *Set Reader to Card and PIN* - The selected door will be locked and only cards with valid facility codes and access levels will be granted access in this mode. A PIN number entry that matches the card number's PIN number field will also be required at the selected reader's keypad. This option is supported for readers with keypads only.

- *Set Reader to Card Or PIN* - The door will be locked and only cards with valid facility codes and access levels or valid PIN numbers will be granted access in this mode.
- *Enable Door Forced Open* - The selected door's forced open event (transaction) WILL be reported while the door forced open is enabled.
- *Disable Door Forced Open* - The selected door's forced open event (transaction) WILL NOT be reported while the door forced open is disabled.
- *Enable Door Held Open* - The selected door's held open event (transaction) WILL be reported while the door held open is enabled.
- *Disable Door Held Open* - The selected door's held open event (transaction) WILL NOT be reported while the door held open is disabled.
- *Grant Access* - The selected door will be unlocked for the amount of time specified in the standard unlock time field for the selected reader.

## EXECUTE TASK

To manually execute a task, select the task to be executed and either click the Execute Task button on the toolbar or click the right mouse button and select Execute Task.

## PRINT

To print a task, select the task and either click the  Print button on the toolbar.

## EXAMPLES OF COMMON TASKS

### ***Setting up a door alarm bypass relay (output).***

This is a common task which is generally used when there is a crash bar or other door alarm device attached to a door and it is necessary to shunt or bypass this device during normal business hours, when a motion detector produces a request to exit for the door.

Task 1:

Task Name = Shunt Door Alarm

Execute this Task When = A Request to Exit is Granted

Reader Name = Select the desired reader name

Only During Timezone = Office Hours

Request to Exit Conditions = Normal Exit Cycle

Task Steps = Pulse Output, select the desired output name

### ***Setting up a "man trap" that will disable a secondary entrance reader until the primary entrance door has been closed.***

This is a common task used to ensure that an outside door has been closed before the card holder can gain access to an inner door such as a clean room. This task can be accomplished by setting up the

following task entries:

Task Name = Enable Inner Lab Entrance Reader

Execute this Task When = A Door Opens or Closes

Reader Name = Select the desired reader name

Only During Timezone = Always

Door Conditions = Door Opens Then Closes

Task Step 1 = Set Reader to Card Only, select the desired inner (clean room) reader name

Task Step 2 = Disable Reader, select the desired outer (outer lab entrance) reader name

The Outer Lab reader would need to be disabled by another task when either a request to exit is granted into the holding area from the clean room or when access is granted at the clean room reader. This will prevent both doors from being open at the same time.

## OK/CANCEL BUTTONS

Clicking on the OK button will save the changes made to the task. Clicking on the Cancel button will not save the changes made to the task.



# DELETE A TASK



Tasks are used to perform automated actions within the system. Tasks can perform a wide variety of actions, such as, disabling a point during a timezone, changing a reader mode during a timezone and pulsing an output when an input is activated. Tasks can contain multiple steps and perform more than one action at a time. Task execution can either be automatically or manually executed.

**Tasks are stored in the panel and will execute regardless whether or not the panel is communicating with the Access It! NExT Step service.**

## DELETING A TASK

To delete a task, click on the Hardware tab and then click on  Tasks toolbar button. Any tasks currently in the database will then be displayed in the right window pane of the Access It! NExT Step. Click on the task to be deleted. Next, click on the  Delete button on the toolbar. Confirmation of the deletion is required. Click Yes to continue with the deletion, click No to exit without deleting.





# EDIT A TASK



Tasks are used to perform automated actions within the system. Tasks can perform a wide variety of actions, such as, disabling a point during a timezone, changing a reader mode during a timezone and pulsing an output when an input is activated. Tasks can contain multiple steps and perform more than one action at a time. Task execution can either be automatically or manually executed. To get to the Task data entry screen, select the Hardware tab on the toolbar and then click on the Tasks button. Any tasks currently in the database will be displayed on the right hand panel of the Access It! NExT Step desktop.

Tasks are stored in the panel and will execute regardless whether or not the panel is communicating with the Access It! NExT Step service.

## EDITING A TASK

To edit a task, click on the Hardware tab and then click on  Tasks toolbar button. Any tasks currently in the database will then be displayed in the right window pane of the Access It! NExT Step desktop. Next, either click on the  Edit button on the toolbar or go to System Menu Tasks  Edit or click the right mouse button and select  Edit .

## TASK NAME

Enter the name to be used for this task. It is recommended that a friendly name be assigned to all of the tasks being used. An example of a friendly name would be "Unlock All Doors". The task name can be up to 50 characters in length.

## EXECUTE CONDITIONS

Select the execute conditions for this task. The execute conditions are the conditions under which this task will be executed while in automatic execute mode. The following execute conditions are supported:

- *Manual Execute Only* - The task will only execute when manually executed.
- *An Input Changes State* - The task will execute each time the selected input changes to the selected state, during the selected timezone.
- *A Door Opens or Closes* - The task will execute each time the selected reader changes to the selected state, during the selected timezone.
- *A Cardholder Presents a Valid Card* - The task will execute each time the selected card transaction is generated at the selected reader, during the selected timezone.

- *A Cardholder Presents an Invalid Card* - The task will execute each time the selected card transaction is generated at the selected reader, during the selected timezone.
- *A Request to Exit is Granted* - The task will execute each time the selected reader is granted a request to exit either by the request to exit device at the panel or by a reader command, during the selected timezone.
- *A Timezone Starts or Ends* - The task will execute each time the selected timezone starts or ends, during the selected timezone.

## TASK STEPS

Enter the steps (actions) to be performed by this task. Tasks can perform as many steps as desired. Click on the Add Step button and choose from the Available Outputs. Move the desired Outputs to the Selected Outputs using the ">>", ">", "<", and "<<" buttons. The ">>" button will move all Outputs from the available window to the selected window. The "<<" button will move all Outputs from the selected window to the available window. Multiple Outputs can be selected by holding down the &lt;Ctrl> key on the keyboard while selecting (clicking) the desired Outputs. The ">" button will move only the highlighted Outputs from the available window to the selected window. The "<" button will move only the highlighted Outputs from the selected window to the available window. Once the desired outputs are selected, use the drop down box to select the step to be performed. The following task steps are supported:

- *Enable Input* - The selected input will be enabled and reporting of events (transactions) will occur from the device attached to the input.
- *Disable Input* - The selected input will be disabled and no reporting of events (transactions) will occur from the device attached to the input.
- *Deactivate Output* - The selected output will be deactivated (de-energized).
- *Activate Output* - The selected output will be activated (energized).
- *Pulse Output* - The selected output will be pulsed (activated, then deactivated) for the amount of time specified in the pulse time setting for the task step.
- *Disable Reader* - The selected door will be locked and the reader will not grant access to any cards, even if they have a valid access level or facility code for the selected door.
- *Unlock Reader/Door* - The selected door will be unlocked.
- *Set Reader to Facility Code Only* - The selected door will be locked and any card with a valid facility code will be granted access to the selected door at any time. The card does not require a valid access level to be granted access in this mode.
- *Set Reader to Card Only* - The selected door will be locked and only cards with valid facility codes and access levels will be granted access in this mode.
- *Set Reader to PIN Only* - The door will be locked and any valid PIN number entered will be granted access in this mode.
- *Set Reader to Card and PIN* - The selected door will be locked and only cards with valid facility

codes and access levels will be granted access in this mode. A PIN number entry that matches the card number's PIN number field will also be required at the selected reader's keypad. This option is supported for readers with keypads only.

- *Set Reader to Card Or PIN* - The door will be locked and only cards with valid facility codes and access levels or valid PIN numbers will be granted access in this mode.
- *Enable Door Forced Open* - The selected door's forced open event (transaction) WILL be reported while the door forced open is enabled.
- *Disable Door Forced Open* - The selected door's forced open event (transaction) WILL NOT be reported while the door forced open is disabled.
- *Enable Door Held Open* - The selected door's held open event (transaction) WILL be reported while the door held open is enabled.
- *Disable Door Held Open* - The selected door's held open event (transaction) WILL NOT be reported while the door held open is disabled.
- *Grant Access* - The selected door will be unlocked for the amount of time specified in the standard unlock time field for the selected reader.

## EXECUTE TASK

To manually execute a task, select the task to be executed and either click the Execute Task button on the toolbar or click the right mouse button and select Execute Task.

## PRINT

To print a task, select the task and click the  Print button on the toolbar.

## EXAMPLES OF COMMON TASKS

### *Setting up a door alarm bypass relay (output).*

This is a common task which is generally used when there is a crash bar or other door alarm device attached to a door and it is necessary to shunt or bypass this device during normal business hours, when a motion detector produces a request to exit for the door.

Task 1:

Task Name = Shunt Door Alarm

Execute this Task When = A Request to Exit is Granted

Reader Name = Select the desired reader name

Only During Timezone = Office Hours

Request to Exit Conditions = Normal Exit Cycle

Task Steps = Pulse Output, select the desired output name

### *Setting up a "man trap" that will disable a secondary entrance reader until the primary entrance*



***door has been closed.***

This is a common task used to ensure that an outside door has been closed before the card holder can gain access to an inner door such as a clean room. This task can be accomplished by setting up the following task entries:

Task Name = Enable Inner Lab Entrance Reader

Execute this Task When = A Door Opens or Closes

Reader Name = Select the desired reader name

Only During Timezone = Always

Door Conditions = Door Opens Then Closes

Task Step 1 = Set Reader to Card Only, select the desired inner (clean room) reader name

Task Step 2 = Disable Reader, select the desired outer (outer lab entrance) reader name

**The Outer Lab reader would need to be disabled by another task when either a request to exit is granted into the holding area from the clean room or when access is granted at the clean room reader. This will prevent both doors from being open at the same time.**

## **OK/CANCEL BUTTONS**

Clicking on the OK button will save the changes made to the task. Clicking on the Cancel button will not save the changes made to the task.

# CHANGING PASSWORDS

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## CHANGING PASSWORDS

You must be logged into the Access It! NExT Step system as the User requiring password change. To change passwords, select the Options link from the upper right corner. You will be required to enter the old password and enter the new password twice to confirm.

# BADGE TYPES

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Badge types are used to determine the physical layout, appearance and contents of a card when it is printed or previewed. Badge types can range from simple visitor cards with static text, to complex card designs with corporate logos, pictures and signatures. Badge types are designed by setting badge properties and utilizing the badge designer. For more information on badge properties, see the [Badge Properties](#) help file topic. For more information on the the badge designer, see the [Badge Designer](#) help file topic.

Click on any of the following topics for additional information.

[Add a Badge Type](#)

[Edit a Badge Type](#)

[Delete a Badge Type](#)



**This feature is optional and must be purchased separately**

# ADDING BADGE TYPES



Badge types are used to determine the physical layout, appearance and contents of a card when it is printed or previewed. Badge types can range from simple visitor cards with static text, to complex card designs with corporate logos, pictures and signatures. Badge types are designed by setting badge properties and utilizing the badge designer. For more information on badge properties, see the [Badge Properties](#) help file topic. For more information on the the badge designer, see the [Badge Designer](#) help file topic.




## ADDING A BADGE TYPE


To add a badge type, go to the Badge Types screen by either clicking the  Badge Types button within the Data Files group. All of the badge types in the database will then be displayed in the right window pane of the Access It! NExT Step. Next, click on the  New option on the toolbar to open the New Badge Type entry screen.

The first step in creating a new badge type is to select the badge properties. For more information on setting the badge properties, see the [Badge Properties](#) help file topic.

The second step when designing a badge type is to add objects to the badge type designer and set their properties. For more information on the badge designer objects and their properties, see [Badge Data](#) help file topic

The third step when designing a badge type is aligning and organizing the badge designer objects in the desired format. For more information on formatting badge designer objects, see the [Badge Designer](#) help topic file.

The fourth step when designing a badge type is to preview the badge type design. To preview click  Print Preview on the toolbar. The card preview window will then be displayed. The card preview window displays the card with the selected badge type and all assigned data fields, signatures and images. Clicking on the Print button will send the card to the printer defined for the badge type of the card being previewed. This printer is assigned using the Badge Properties. For more information on the Badge Properties, see the [Badge Properties](#) help file topic. The card can also be viewed at different zoom levels by clicking the  Zoom In and  Zoom Out buttons on the menu bar.

The final step when designing a badge type is to save the changes by clicking  Save on the toolbar.


**This feature is optional and must be purchased separately**

# EDITING BADGE TYPES



Badge types are used to determine the physical layout, appearance and contents of a card when it is printed or previewed. Badge types can range from simple visitor cards with static text, to complex card designs with corporate logos, pictures and signatures. Badge types are designed by setting badge properties and utilizing the badge designer. For more information on badge properties, see the [Badge Properties](#) help file topic. For more information on the the badge designer, see the [Badge Designer](#) help file topic.

## EDITING A BADGE TYPE




To edit a badge type, go to the Badge Types screen by clicking the Badge Types toolbar button within the Data Files group. All of the badge types will then be displayed in the right window pane of the Access It! NExT Step. To Select the badge type to be edited either click on the  Edit button on the toolbar, or double click the badge type to be edited.


All of following steps to edit a badge type are optional, depending upon the changes you wish to make to the badge type.

The first step in editing a badge type is to modify the badge properties. For more information on setting the badge properties, see the [Badge Properties](#) help file topic.

The second step when editing a badge type is to add objects to the badge type designer and set their properties. For more information on the badge designer objects and their properties, see [Badge Data](#) help file topic

The third step when editing a badge type is aligning and organizing the badge designer objects in the desired format. For more information on formatting badge designer objects, see the [Badge Designer](#) help topic file.

The fourth step when editing a badge type is to preview the badge type design. To preview click  Print Preview on the toolbar. The card preview window will then be displayed. The card preview window displays the card with the selected badge type and all assigned data fields, signatures and images. Clicking on the Print button will send the card to the printer defined for the badge type of the card being previewed. This printer is assigned using the Badge Properties. For more information on the Badge Properties, see the [Badge Properties](#) help file topic. The card can also be viewed at different zoom levels by clicking the  Zoom In and  Zoom Out buttons on the menu bar.

The final step when editing a badge type is to save the changes by clicking  Save on the toolbar.

**This feature is optional and must be purchased separately**







# DELETING BADGE TYPES

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Badge types are used to determine the physical layout, appearance and contents of a card when it is printed or previewed. Badge types can range from simple visitor cards with static text, to complex card designs with corporate logos, pictures and signatures. Badge types are designed by setting badge properties and utilizing the badge designer. For more information on badge properties, see the [Badge Properties](#) help file topic. For more information on the the badge designer, see the [Badge Designer](#) help file topic.

## DELETING A BADGE TYPE

To delete a badge type, go to the Badge Types screen by clicking the  Badge Types button within the Data Files group. All of the badge types in the database will then be displayed in the right window pane of the Access It! NExT Step. Click on the badge type to be deleted and then click  Delete on the toolbar. You will then be asked to confirm the deletion. Click the Yes button to confirm the badge type deletion or click No to cancel the deletion.

**This feature is optional and must be purchased separately**

# BADGE DESIGNER



The badge designer is used to create new or modify existing badge type designs. Badge types can be designed with many different styles and functions. For more information on badge types, see the [Badge Types](#) help file topic.

The badge designer is similar in function to a paintbrush style application. Objects are added to the badge type design and properties are set to determine the functionality of these objects. Single or dual sided badge types are fully supported.

The first step when designing a badge type is to set the overall badge properties. These properties control the way the card is formatted and printed. For more information on badge properties, see the [Badge Properties](#) help file topic.

The second step when designing a badge type is to add objects to the badge type design and set their properties. For more information on badge designer objects see any of the badge designer object help file topic.

The third step when designing a badge type is to save the changes to the badge type and preview the card to see the results. For more information on previewing cards, see the [Previewing Cards](#) help file topic.

The following formatting functions are supported in the badge designer:

## ALIGN

The align function is used to align a single object or multiple objects with either each other or the badge designer grid. To access the align functions, click on one or more of the design objects (multiple objects are selected by holding down the <CTRL> key while clicking on the object to be selected), then go to System ~~M~~enu Format. The following align functions are supported:

- *To Grid* - This function will align a single or multiple objects to the closest grid snap location. To select multiple objects to align, hold down the <Ctrl> key while clicking on each of the objects to be selected.
- *Lefts* - This function will left align multiple objects to the same left badge location. To select multiple objects to align, hold down the <Ctrl> key while clicking on each of the objects to be selected. If only one object is selected, this function will not be available.
- *Centers* - This function will center align multiple objects to the same center badge location. To select multiple objects to align, hold down the <Ctrl> key while clicking on each of the objects to be selected. If only one object is selected, this function will not be available.



- *Rights* - This function will right align multiple objects to the same right badge location. To select multiple objects to align, hold down the <Ctrl> key while clicking on each of the objects to be selected. If only one object is selected, this function will not be available.
- *Tops* - This function will top align multiple objects to the same top badge location. To select multiple objects to align, hold down the <Ctrl> key while clicking on each of the objects to be selected. If only one object is selected, this function will not be available.
- *Middles* - This function will middle align multiple objects to the same middle badge location. To select multiple objects to align, hold down the <Ctrl> key while clicking on each of the objects to be selected. If only one object is selected, this function will not be available.
- *Bottoms* - This function will bottom align multiple objects to the same bottom badge location. To select multiple objects to align, hold down the <Ctrl > key while clicking on each of the objects to be selected. If only one object is selected, this function will not be available.

## SIZE TO GRID

This option will size the selected object(s) to the nearest adjoining grid hash marks.

## BRING TO FRONT

This option will put the selected object(s) in front of any other objects in the design area.



## SEND TO BACK

This option will put the selected object(s) behind any other objects in the design area.

**This feature is optional and must be purchased separately**

# BADGE PROPERTIES



The badge properties control the way a badge type design is formatted and printed. To access the badge properties, go to **System=Menu File  Badge Properties...** or click on the ** Badge Properties** toolbar button with no objects selected.

The following badge properties are supported:

## PRINTER SETTINGS

Select the printer for the badge type design. The printer selected will determine the physical size and possible orientations for the badge type design.

**Only the printers installed through the local operating system will be available for selection. For information on installing printers, see the operating system documentation.**

## PROMPT FOR ALTERNATE PRINTER WHEN PRINTING

Select (check) this option to have a window displayed each time the card is printed. This window will allow a different printer to be selected for printing than was originally assigned to the badge type design. This option is useful for systems that have more than one card printer in use.

**If the new printer selected does not have the capabilities of the original printer assigned to the badge type design, unpredictable results may occur.**

## CARD SIZE

Select the card size for the badge type design. On some printers, this option may be referred to as the paper size. The card size selected will determine the physical size and possible orientations for the badge type design.

**The card sizes available will vary depending on the type and model of printer selected.**

## CARD BIN

Select the card bin for the badge type design. On some printers, this option may be referred to as the paper tray. The card bin selected will determine the printer media source for the badge type design.

**The card bins available will vary depending on the type and model of printer selected.**

## ORIENTATION

Select the orientation for the badge type design. Select portrait for top to bottom orientation or

landscape for left to right orientation.

## DUPLEX PRINTING

Select the duplex options for the badge type design. The following duplex options are supported:

**Verify that the printer selected supports duplex printing before using this option.**

- *Simplex* - This option will set up the badge type design for single sided printing.
- *Vertical Card Flip* - This option will set up the badge type design for dual sided printing. The card will be flipped from top to bottom (vertically) when printed.
- *Horizontal Card Flip* - This option will set up the badge type design for dual sided printing. The card will be flipped from left to right (horizontally) when printed.

## LAYOUT

Select or create a page layout for the badge type design. Page layouts are used when more than one card per page needs to be printed. This option is generally used for printing visitor cards and temporary use cards on adhesive labels. For more information on page layouts, see the [Page Layouts](#) help file topic.

## GLOBAL SETTINGS

- *Object Snap Mode* - When the None option is selected, there will be no assistance with alignment of objects on the grid. When the Snap to Grid option is selected, objects will be automatically aligned to the nearest grid lines. When the SnapLines option is selected horizontal and vertical line segments appear dynamically on the grid to assist in the placement of objects on the grid.
- *Show Grid* - Select (check) this option to have grid lines to assist with placement of objects during badge design.
- *Grid Columns/Rows* - Use the up/down arrow to indicate the number of grid tick marks per unit for both the columns and rows.
- *Ruler Units* - Use the drop down box to select U.S. units (1 inch) or metric units (1 centimeter).

**This feature is optional and must be purchased separately**

# EXPRESSION BUILDER

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The expression builder is used to create advanced functions for use on badge type designs. To build an expression, click on the category, then double click on the field, function or operator to be added to the expression. The expression will be built in the expression builder window as the items are selected. Syntax help will be displayed in the syntax help window whenever a category and item have been selected.

Use of the expression builder can be very complex and is only recommended for advanced users. Further assistance regarding the use of expressions can be found in any documentation for the VBScript scripting language. Further discussion of the VBScript scripting language and expressions is beyond the scope of this help text.

The following categories are supported for the expression builder:

## DATA FIELDS

This category displays all of the card holder data fields that are available to build expressions. Select the card holder data field to be added to the expression by double clicking on the desired field.

## BUILT-IN FUNCTIONS

This category displays all of the built in functions that are available to build expressions. Select the built in function to be added to the expression by double clicking on the desired function.

## BADGE FUNCTIONS

This category displays all of the badge functions that are available to build expressions. Select the badge function to be added to the expression by double clicking on the desired function.

## OPERATORS

This category displays all of the operators that are available to build expressions. Select the operator to be added to the expression by double clicking on the desired operator.

## CONSTANTS

This category displays all of the constants that are available to build expressions. Select the constant to be added to the expression by double clicking on the desired constant.


## SHOW ALL FUNCTIONS

This option displays all of the available functions for all of the categories. Only the most commonly used functions are displayed by default. Select (check) this option to display all of the available functions for each category.

**This feature is optional and must be purchased separately**

# PHOTO

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The photo object is used to add a badge holder photo to the badge type design. To add a photo object to the badge type design, either double click the  Photo option in the Badge Data group or click on the Photo icon and drag it to the desired location on the badge type design. A photo object will then be placed on the badge type design at the default size. The photo object should then be moved to the desired location on the badge type design by clicking anywhere inside the photo object and dragging it to the desired location. The photo object should then be resized by clicking on any of the handles of the object and dragging it to the desired size. The photo object properties should then be set by either double clicking anywhere inside the photo object, or by clicking the object properties button on the badge designer toolbar. The photo object properties can also be accessed by selecting properties from the edit option on the badge designer menu.

The following properties are supported for the photo object:

## APPEARANCE

- Picture
  - Back Color - Use the drop down box to select the desired background color of the photo object.
  - Transparency - Sets the degree of transparency of the photo object expressed as a percentage from 0-100.
  - Alignment - Indicates where within the photo object the associated cardholder photo will be located.
  - Size Mode
    - *Clip* - This option clips any part of the photo that does not fit within the photo object frame. This option may result in only part of the photo being displayed.
    - *Stretch* - This option stretches the photo to fill the photo object frame. This may result in some aspect ratio distortion of the photo.
    - *Zoom* - This option adjusts the size of the photo to fill the entire size of the photo object frame. This option may result in some aspect ratio distortion of the photo.
  - Rotation
    - *0 Degrees* - This option will not rotate the picture.
    - *90 Degrees* - This option rotates the picture by 90 degrees or 1/4 turn.
    - *180 Degrees* - This option rotates the picture by 180 degrees or 1/2 turn.
    - *270 Degrees* - This option rotates the picture by 270 degrees or 3/4 turn.
- Outline
  - Style - Use the drop down box to select from the available options for the outline style

which are transparent, solid, dash, dot, dashdot, and dashdotdot.

- Color - Use the drop down box to select the desired color of the outline.
- Weight - Use the up/down arrows to select a value from 0-99 or enter the desired value. This determines the thickness of the outline.
- Border
  - Style - Use the drop down box to select from the available options for the border style which are none, solid, dash, dot, dashdot, dashdotdot, double, thicksolid, thickdash, thickdot, thickdashdot, thickdashdotdot, thickdouble, and extrathickdouble.
  - Color - Use the drop down box to select the desired color of your photo object border.

## BEHAVIOR

This option determines when the photo object will be included when this badge type is printed. The default is Always. Click the Edit... button to specify conditional printing criteria. An example of conditional criteria would be to print the photo object only when the Card Status = Active.

## LAYOUT

These parameters specify the location and size of the photo object. The location properties determine where, within the badge object the photo object will be placed. Use the up/down arrows to specify the distance from the top and left margins the photo will appear. The size properties determine the actual dimensions of the photo object. Use the up/down arrows to set the height and width of the photo object.

The signature object is used to add a badge holder signature to the badge type design. To add a signature object to the badge type design, either double click the Signature option in the Badge Data group or click on the Signature icon and drag it to the desired location on the badge type design. A signature object will then be placed on the badge type design at the default size. The signature object should then be moved to the desired location on the badge type design by clicking anywhere inside the object and dragging it to the desired location. The signature object should then be resized by clicking on any of the handles of the object and dragging it to the desired size. The signature object properties should then be set by either double clicking anywhere inside the object, or by clicking the object properties button on the badge designer toolbar. The signature object properties can also be accessed by selecting properties from the edit option on the badge designer menu.

The following properties are supported for the signature object:

## APPEARANCE

- Picture
  - Back Color - Use the drop down box to select the desired background color.
  - Transparency - This option determines how "transparent" the signature will be. Valid entries are from 0 (not transparent) to 100 (completely transparent). This option is generally used to obtain a "floating signature" making the badge more difficult to duplicate.
  - Alignment - Use the drop down box to select from the following alignment options: top left, top right, center, bottom left, and bottom right. This option determines where, within the signature object, the captured signature will be placed.
  - Size Mode
    - *Clip* - This option clips any part of the captured signature that does not fit within the signature object frame. This option may result in only part of the signature being displayed.
    - *Stretch* - This option stretches the captured signature to fill the signature object frame. This may result in some aspect ratio distortion of the signature.
    - *Zoom* - This option adjusts the size of the captured signature to fill the entire area of the signature object frame. This option may result in some aspect ratio distortion of the signature.
  - Rotation
    - *0 Degrees* - This option will not rotate the picture.
    - *90 Degrees* - This option rotates the picture by 90 degrees or 1/4 turn.



- *180 Degrees* - This option rotates the picture by 180 degrees or 1/2 turn.
- *270 Degrees* - This option rotates the picture by 270 degrees or 3/4 turn.
- Outline
  - Style - Use the drop down box to select the desired outline style from the following options: transparent, solid, dash, dot, dashdot, and dashdotdot.
  - Color - Use the drop down box to select the desired color of the outline.
  - Weight - Use the up/down arrows to select a value from 0-99 or enter the desired value. This determines the thickness of the outline.
- Border
  - Style - Use the drop down box to select the border style from the following options: none, solid, dash, dot, dashdot, dashdotdot, double, thicksolid, thickdash, thickdot, thickdashdot, thickdashdotdot, thickdouble, and extrathickdouble.
  - Color - Use the drop down box to select the desired color of your signature object border.

## BEHAVIOR


This option determines when the signature object will be included when this badge type is printed. The default is Always. Click the Edit... button to specify conditional printing criteria. An example of conditional criteria would be to print the signature object only when the Card Status = Active.

## LAYOUT

These parameters specify the location and size of the signature object. The location properties determine where, within the badge object the signature object will be placed. Use the up/down arrows to specify the distance from the top and left margins the signature will appear. The size properties determine the actual dimensions of the signature object. Use the up/down arrows to set the height and width of the signature object.

# PICTURE



The picture object is used to add an image (graphic) file to the badge type design. The JPEG (.JPG or .JPEG), Windows Bitmap (.BMP), graphical interchange format (.GIF), portable network graphics (.PNG), icon (.ICO), enhanced metafiles (.EMF), and Windows metafiles (.WMF) file formats are supported. To add a picture object to the badge type design, either double click the  Picture option in the Tools group or click on the Picture icon and drag it to the desired location on the badge type design. A picture object will then be placed on the badge type design at the default size. The object should then be moved to the desired location on the badge type design by clicking anywhere inside the object and dragging it to the desired location. The picture object should then be resized by clicking on any of the handles of the object and dragging it to the desired size. The object properties should then be set by either double clicking anywhere inside the picture object, or by clicking the object properties button on the badge designer toolbar.

## APPEARANCE

- Picture
  - Back Color - This option determines the color behind the picture object if the picture does not fill the entire badge or is not formatted to fill the entire badge via size mode option below.
  - Transparent Color - This option determines the fill color that will appear in areas where the picture object is transparent.
  - Alignment - This option determines the placement of the picture object on the badge object.
  - Size Mode
    - *Clip* - This option clips any part of the picture that does not fit within the picture object frame. This option may result in only part of the picture being displayed.
    - *Stretch* - This option stretches the picture to fill the picture object frame. This may result in some aspect ratio distortion of the picture.
    - *Zoom* - This option adjusts the size of the picture to fill the entire size of the picture object frame. This option may result in some aspect ratio distortion of the picture.
- Outline
  - Style - Use the drop down box to select from the available options for the outline style which are transparent, solid, dash, dot, dashdot, and dashdotdot.
  - Color - Use the drop down box to select the desired color of the outline.
  - Weight - Use the up/down arrows to select a value from 0-99 or enter the desired value. This determines the thickness of the outline.
- Border

- Style - Use the drop down box to select from the available options for the border style which are none, solid, dash, dot, dashdot, dashdotdot, double, thicksolid, thickdash, thickdot, thickdashdot, thickdashdotdot, thickdouble, and extrathickdouble.
- Color - Use the drop down box to select the desired color of your photo object border.

## BEHAVIOR

Select the desired track to encoded by checking the check box. Enter any desired optional code for the badge type design. Code can be used for things such as mag stripe encoding when a card is being printed. For more information on entering expressions in the code window, see the [Expression Builder](#) help file topic.

**Badge type code can be very complex and is only recommended for advanced users. Improper use of the code function can result in erratic card printing and application malfunction.**

## LAYOUT

These parameters specify the location and size of the picture object. The location properties determine where, within the badge object the picture object will be placed. Use the up/down arrows to specify the distance from the top and left margins the picture will appear. The size properties determine the actual dimensions of the picture object. Use the up/down arrows to set the height and width of the picture object.

# LINE OBJECT

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The line object is used to add a line to the badge type design. To add a line object, either double click the Line button in the Tools toolbar or single click on the Line button and drag and drop the line to the desired location in the badge design field. The line object should then be moved to the correct location on the badge type design by clicking anywhere on the line object and dragging it to the desired location. The line should then be resized by clicking on either of the handles and dragging it to the desired size. The line object properties can be set by either double clicking anywhere on the line object, or by clicking the object properties button on the right hand side of the badge designer screen.

The following properties are supported for the horizontal line object:

## APPEARANCE

- Line
  - Style - Use the drop down box to select from the following line styles.
    - *Transparent* - This option will set the horizontal line border style to produce an invisible line.
    - *Solid* - This option will set the horizontal line border style to produce a solid line.
    - *Dash* - This option will set the horizontal line border style to produce a dashed line.
    - *Dot* - This option will set the horizontal line border style to produce a dotted line.
    - *Dash Dot* - This option will set the horizontal line border style to produce a dashed and dotted line.
    - *Dash Dot Dot* - This option will set the horizontal line border style to produce a dashed and dotted line.
  - Color - Use the drop down box to select the desired line color.
  - Weight - Use the up/down arrows to select the desired thickness for the line object.

## BEHAVIOR

Print When the Following Expression is True - This option determines whether or not the line object will print or preview based on the result of an expression. If the expression entered returns a true result, then the line will be printed. If the expression entered returns a false result, then the line will not be printed. An expression can either be typed in manually or built using the expression builder by clicking on the "Edit..." button. For more information on the Expression Builder, see the [Expression Builder](#) help file topic.

## LAYOUT

The following design options for the line object can also be set by using the handles on the object and/or by clicking anywhere on the line and dragging it to the desired location.

- Endpoints

- X1 - Use the up/down arrows to select the desired left endpoint of the line from the left hand margin of the badge.
- X2 - Use the up/down arrows to select the desired right endpoint of the line from the left hand margin of the badge.
- Y1 - Use the up/down arrows to select the desired position of the left endpoint of the line from the top margin of the badge.
- Y2 - Use the up/down arrows to select the desired position of the right endpoint of the line from the top margin of the badge.

# RECTANGLE



The rectangle object is used to add a rectangle to the badge type design. To add a rectangle object to the badge type design, either double click the Shape button in the Tools toolbar or single click on the Shape button and drag and drop the shape to the desired location in the badge design field. The default shape is the rectangle; the ellipse and rounded rectangle shapes are also available. Use the shape style drop down box to select the desired shape. The rectangle object should then be moved to the correct location on the badge type design by clicking anywhere inside the object and dragging it to the desired location. The object can then be resized by clicking on any of the handles on the object and dragging it to the desired size. The rectangle object properties can be set by either double clicking anywhere inside the object, or by clicking the object properties button on the right hand side of the badge designer screen.

The following properties are supported for the rectangle object:

## APPEARANCE

- Shape
  - Style - This option sets the rectangle object shape to either a rectangle, ellipse or rounded rectangle.
  - Back Color - This determines what the background color of the shape will be, if any of the background is visible.
- Outline
  - Style
    - *Transparent* - This option sets the rectangle outline style to invisible.
    - *Solid* - This option sets the rectangle outline style to produce a solid outline.
    - *Dash* - This option sets the rectangle outline style to produce a dashed outline.
    - *Dot* - This option sets the rectangle outline style to produce a dotted outline.
    - *Dash Dot* - This option sets the rectangle outline style to produce a dashed and dotted outline.
    - *Dash Dot Dot* - This option sets the rectangle outline style to produce a dashed and dotted outline.
  - Color - Use the drop down box to select the desired color for the rectangle outline.
  - Weight - Use the up/down arrows to set the weight of the outline; this option sets the width or thickness of the rectangle outline.
- Border
  - Style

- *None* - This option sets the rectangle border style to invisible.
- *Solid* - This option sets the rectangle border style to a solid line.
- *Dash* - This option sets the rectangle border style to a dashed line.
- *Dot* - This option sets the rectangle border style to a dotted line.
- *Dashdot* - This option sets the rectangle border style to a dashed dotted line pattern.
- *Dashdotdot* - This option sets the rectangle border style to a dashed dotted dotted line pattern.
- *Double* - This option sets the rectangle border style to a double solid line.
- *Thicksolid* - This option sets the rectangle border style to a thick solid line.
- *Thickdash* - This option sets the rectangle border style to a thick dashed line.
- *Thickdot* - This option sets the rectangle border style to a thick dotted line.
- *Thickdashdot* - This option sets the rectangle border style to a thick dashed dotted line.
- *Thickdashdotdot* - This option sets the rectangle border style to a thick dashed dotted dotted line pattern.
- *Thickdouble* - This option sets the rectangle border style to a thick double solid line.
- *Extrathickdouble* - This option sets the rectangle border style to a double solid line.
- Color - Use the drop down box to select the desired border color.

## BEHAVIOR

Print When the Following Expression is True - This option determines whether or not the rectangle will print or preview based on the result of an expression. If the expression entered returns a true result, then the rectangle will be printed. If the expression entered returns a false result, then the rectangle will not be printed. An expression can either be typed in manually or built using the expression builder by clicking on the "Edit..." button. For more information on the Expression Builder, see the [Expression Builder](#) help file topic.

## LAYOUT

The following design options for the rectangle object can also be set by using the handles on the rectangle object and/or by clicking anywhere inside the rectangle object and dragging it to the desired location.

- Location
  - Top - Use the up/down arrows to determine the location of the rectangle object from the top of the badge design area.
  - Left - Use the up/down arrows to determine the location of the rectangle object from the left edge of the badge design area.
- Size
  - Height - Use the up/down arrows to determine the height of the rectangle object.

- o Width - Use the up/down arrows to determine the width of the rectangle object.



# ROUNDED RECTANGLE



The rounded rectangle object is used to add an rounded rectangle to the badge type design. To add a rounded rectangle to the badge type design, either double click the Shape button in the Tools toolbar or single click on the Shape button and drag and drop the shape to the desired location in the badge design field. The default shape is the rectangle, use the shape style drop down box to select the rounded rectangle. The rounded rectangle should then be moved to the correct location on the badge type design by clicking anywhere inside the object and dragging it to the desired location. The object should then be resized by clicking on any of the handles on the object and dragging it to the desired size. The object properties can be set by either double clicking anywhere inside the object, or by clicking the object properties button on the right hand side of the badge designer screen.

The following properties are supported for the rounded object:

## APPEARANCE

- Shape
  - Style - This option sets the ellipse object shape to either a rectangle, ellipse or rounded rectangle.
  - Back Color - This determines what the background color of the shape will be, if any of the background is visible.
  - Radius - Use the up/down arrows to change the radius on the object. This determines the extent of the rounding of the corners of the rectangle.
- Outline
  - Style
    - *Transparent* - This option sets the rounded rectangle outline style to invisible.
    - *Solid* - This option sets the rounded rectangle outline style to produce a solid outline.
    - *Dash* - This option sets the rounded rectangle outline style to produce a dashed outline.
    - *Dot* - This option sets the rounded rectangle outline style to produce a dotted outline.
    - *Dash Dot* - This option sets the rounded rectangle outline style to produce a dashed and dotted outline.
    - *Dash Dot Dot* - This option sets the rounded rectangle outline style to produce a dashed and dotted outline.
  - Color - Use the drop down box to select the desired color for the rounded rectangle outline.
  - Weight - Use the up/down arrows to set the weight of the outline; this option sets the width or thickness of the rounded rectangle outline.
- Border

- Style
  - *None* - This option sets the rounded rectangle border style to invisible.
  - *Solid* - This option sets the rounded rectangle border style to a solid line.
  - *Dash* - This option sets the rounded rectangle border style to a dashed line.
  - *Dot* - This option sets the rounded rectangle border style to a dotted line.
  - *Dashdot* - This option sets the rounded rectangle border style to a dashed dotted line pattern.
  - *Dashdotdot* - This option sets the rounded rectangle border style to a dashed dotted dotted line pattern.
  - *Double* - This option sets the rounded rectangle border style to a double solid line.
  - *Thicksolid* - This option sets the rounded rectangle border style to a thick solid line.
  - *Thickdash* - This option sets the rounded rectangle border style to a thick dashed line.
  - *Thickdot* - This option sets the rounded rectangle border style to a thick dotted line.
  - *Thickdashdot* - This option sets the rounded rectangle border style to a thick dashed dotted line.
  - *Thickdashdotdot* - This option sets the rounded rectangle border style to a thick dashed dotted dotted line pattern.
  - *Thickdouble* - This option sets the rounded rectangle border style to a thick double solid line.
  - *Extrathickdouble* - This option sets the rounded rectangle border style to a double solid line.
- Color - Use the drop down box to select the desired border color.

## BEHAVIOR

Print When the Following Expression is True - This option determines whether or not the rounded rectangle will print or preview based on the result of an expression. If the expression entered returns a true result, then the rounded rectangle will be printed. If the expression entered returns a false result, then the rounded rectangle will not be printed. An expression can either be typed in manually or built using the expression builder by clicking on the "Edit..." button. For more information on the Expression Builder, see the [Expression Builder](#) help file topic.

## LAYOUT

The following design options for the rounded rectangle object can also be set by using the handles on the rounded rectangle object and/or by clicking anywhere inside the rounded rectangle object and dragging it to the desired location.

- Location
  - Top - Use the up/down arrows to determine the location of the rounded rectangle object

from the top of the badge design area.

- Left - Use the up/down arrows to determine the location of the rounded rectangle object from the left edge of the badge design area.

- Size

- Height - Use the up/down arrows to determine the height of the rounded rectangle object.
- Width - Use the up/down arrows to determine the width of the rounded rectangle object.

# ELLIPSE



The ellipse object is used to add an ellipse to the badge type design. To add an ellipse object to the badge type design, either double click the Shape button in the Tools toolbar or single click on the Shape button and drag and drop the shape to the desired location in the badge design field. The default shape is the rectangle, use the shape style drop down box to select the ellipse. The ellipse object should then be moved to the correct location on the badge type design by clicking anywhere inside the ellipse object and dragging it to the desired location. The ellipse object should then be resized by clicking on any of the handles on the ellipse object and dragging it to the desired size. The ellipse object properties can be set by either double clicking anywhere inside the ellipse object, or by clicking the object properties button on the right hand side of the badge designer screen.

The following properties are supported for the ellipse object:

## APPEARANCE

- Shape
  - Style - This option sets the ellipse object shape to either a rectangle, ellipse or rounded rectangle.
  - Back Color - This determines what the background color of the shape will be, if any of the background is visible.
- Outline
  - Style
    - *Transparent* - This option sets the ellipse outline style to invisible.
    - *Solid* - This option sets the ellipse outline style to produce a solid outline.
    - *Dash* - This option sets the ellipse outline style to produce a dashed outline.
    - *Dot* - This option sets the ellipse outline style to produce a dotted outline.
    - *Dash Dot* - This option sets the ellipse outline style to produce a dashed and dotted outline.
    - *Dash Dot Dot* - This option sets the ellipse outline style to produce a dashed and dotted outline.
  - Color - Use the drop down box to select the desired color for the ellipse outline.
  - Weight - Use the up/down arrows to set the weight of the outline; this option sets the width or thickness of the ellipse outline.
- Border
  - Style
    - *None* - This option sets the ellipse border style to invisible.

- *Solid* - This option sets the ellipse border style to a solid line.
- *Dash* - This option sets the ellipse border style to a dashed line.
- *Dot* - This option sets the ellipse border style to a dotted line.
- *Dashdot* - This option sets the ellipse border style to a dashed dotted line pattern.
- *Dashdotdot* - This option sets the ellipse border style to a dashed dotted dotted line pattern.
- *Double* - This option sets the ellipse border style to a double solid line.
- *Thicksolid* - This option sets the ellipse border style to a thick solid line.
- *Thickdash* - This option sets the ellipse border style to a thick dashed line.
- *Thickdot* - This option sets the ellipse border style to a thick dotted line.
- *Thickdashdot* - This option sets the ellipse border style to a thick dashed dotted line.
- *Thickdashdotdot* - This option sets the ellipse border style to a thick dashed dotted dotted line pattern.
- *Thickdouble* - This option sets the ellipse border style to a thick double solid line.
- *Extrathickdouble* - This option sets the ellipse border style to a double solid line.
- Color - Use the drop down box to select the desired border color.

## BEHAVIOR

Print When the Following Expression is True - This option determines whether or not the ellipse will print or preview based on the result of an expression. If the expression entered returns a true result, then the ellipse will be printed. If the expression entered returns a false result, then the ellipse will not be printed. An expression can either be typed in manually or built using the expression builder by clicking on the "Edit..." button. For more information on the Expression Builder, see the [Expression Builder](#) help file topic.

## LAYOUT

The following design options for the ellipse object can also be set by using the handles on the ellipse object and/or by clicking anywhere inside the ellipse object and dragging it to the desired location.

- Location
  - Top - Use the up/down arrows to determine the location of the ellipse object from the top of the badge design area.
  - Left - Use the up/down arrows to determine the location of the ellipse object from the left edge of the badge design area.
- Size
  - Height - Use the up/down arrows to determine the height of the ellipse object.
  - Width - Use the up/down arrows to determine the width of the ellipse object.



The static text object is used to add static text, conditional text or labels to the badge type design. To add a static text object to the badge type design, either double click the **A** text icon or click and drag the **A** text icon to the desired location on the badge type design. A static text object will then be placed on the badge type design at the default size. The static text object should then be moved to the correct location on the badge type design by clicking anywhere inside the static text object and dragging it to the desired location. The static text object should then be resized by clicking on any of the handles on the static text object and dragging it to the desired size. The static text object properties can then be set by clicking anywhere inside the static text object and making the desired adjustments in the Object Properties window.

The following properties are supported for the static text object:

## DATA

- *Text* - Select the Text toggle button to enter plain text in the static text object.
- *Data Field* - Select the Data Field toggle button to use data contained in a database field in the static text object.
- *Expression* - Select the Expression toggle button to build an expression containing multiple database fields in the static text object. For more information on the Expression Builder, see the [Expression Builder](#) help file topic

## BEHAVIOR

- *Text Angle* - Use the up/down arrows to select the desired angle for the text in the text box. The following options indicate the results of selected values.
  - *0 Degrees* - This option will not rotate the text.
  - *90 Degrees* - This option rotates the text by 90 degrees or 1/4 turn.
  - *180 Degrees* - This option rotates the text by 180 degrees or 1/2 turn.
  - *270 Degrees* - This option rotates the text by 270 degrees or 3/4 turn.
- *Auto Scale Font* - If this option is selected, the font size is adjusted so that the text, data field, or expression will fit entirely into the text box.
- *Multi Line* - If this option is selected, text which requires more than one line because of its size will be displayed on multiple lines.
- *Word Wrap* - If this option is selected, text will automatically wrap to the beginning of the next line, when necessary.

- **Print When the Following Expression is True** - This option determines whether or not the text will print or preview based on the result of an expression. If the expression entered returns a true result, then the text will be printed. If the expression entered returns a false result, then the text will not be printed. The default is Always. Click the Edit... button to specify conditional printing criteria. An example of conditional criteria would be to print the photo object only when the Card Status = Active. For more information on the Expression Builder, see the [Expression Builder](#) help file topic.

## APPEARANCE

- **Alignment**
  - *Horizontal* - This option sets the horizontal text alignment within the static text object frame. Select either left for left justified text, center for centered text or right for right justified text.
  - *Vertical* - This option sets the vertical text alignment within the static text object frame. Select either top to align text at the top of the text box, center to center text in the text box, or bottom to align text at the bottom of the text box.
- **Color**
  - *Background* - Use the drop down box to select the background color for the text box.
  - *Text* - Use the drop down box to select the text color for the text in the text box.
- **Font** - Click the Edit... button to select the font properties.
- **Spacing**
  - *Character* - Use the up/down arrows to set the character spacing. The higher the number, the greater the amount of space between characters.
  - *Line* - Use the up/down arrows to set the line spacing. The higher the number, the greater the amount of space between lines.
- **Border**
  - *Style* - Use the drop down box to select from the available options for the border style which are none, solid, dash, dot, dashdot, dashdotdot, double, thicksolid, thickdash, thickdot, thickdashdot, thickdashdotdot, thickdouble, and extrathickdouble.
  - *Color* - Use the drop down box to select the border color

## LAYOUT

- **Location**
  - *Top* - Manually enter or use the up/down arrows to select the distance of the static text box from the top of the badge design area.
  - *Left* - Manually enter or use the up/down arrows to select the distance of the static text box from the left side of the badge design area.



- **Size**

- *Height* - Manually enter or use the up/down arrows to select the height of the static text box.
- *Width* - Manually enter or use the up/down arrows to select the width of the static text box.

- **Padding**

- *Left* - Manually enter or use the up/down arrows to select the padding to the left of the text in the static text box.
- *Right* - Manually enter or use the up/down arrows to select the padding to the right of the text in the static text box.
- *Top* - Manually enter or use the up/down arrows to select the padding above the text in the static text box.
- *Bottom* - Manually enter or use the up/down arrows to select the padding below the text in the static text box.

The badge data object is used to add badge holder data fields to the badge type design. To add a badge data object to the badge type design, expand the badge data within the toolbox by clicking on the plus sign, then click on the badge data field that is to be added and drag it to the desired location on the badge type design area. A badge data object will then be placed on the badge type design at the default size. The badge data object should then be moved to the correct location on the badge type design by clicking anywhere inside the badge data object and dragging it to the desired location. The badge data object should then be resized by clicking on any of the handles on the badge data object and dragging it to the desired size. The badge data object properties should then be set by either double clicking anywhere inside the badge data object, or by clicking the object properties button on the right hand side of the badge design screen.

**The badge data fields that are available will vary based upon the user fields that are being used. Only user fields which have had their user field label name changed from the default will be displayed.**

The following properties are supported for the badge data object:

## DATA OBJECTS

- Images
  - [Photo](#)
  - [Signature](#)
  - [Picture](#)
- Shapes
  - [Line Object](#)
  - [Rectangle](#)
  - [Rounded Rectangle](#)
  - [Oval](#)
- Text
  - [Static Text](#)
- Badge Data
  - [Badge Data Fields](#)

## DATA

- Text -
- Data Field -

- Expression -

## APPEARANCE

- Alignment - This option determines how, within the data object, text will be aligned.
  - Horizontal - Options for horizontal alignment include left, center, right, and justify. Justify will stretch or compress the text to fill the data object.
  - Vertical - Options for vertical alignment include top, middle, and bottom.
- Color
  - Background - Use the drop down box to select the color that will appear behind the text.
  - Text - Use the drop down box to select the color of the text that will appear in the data object.
- Font
  - Click on the Edit...button to open a dialogue box to select the desired font attributes.
- Spacing
  - Character - Use the up/down arrows to determine the character spacing within the data object. The higher the number the greater the amount of space between characters.
  - Line - Use the up/down arrows to determine the line spacing within the data object. If the text in the data object has multiple lines, this will determine the amount of space between the lines. The higher the number, the greater the amount of space between lines.
- Border
  - Style
    - *None* - This option sets the ellipse border style to invisible.
    - *Solid* - This option sets the ellipse border style to a solid line.
    - *Dash* - This option sets the ellipse border style to a dashed line.
    - *Dot* - This option sets the ellipse border style to a dotted line.
    - *Dashdot* - This option sets the ellipse border style to a dashed dotted line pattern.
    - *Dashdotdot* - This option sets the ellipse border style to a dashed dotted dotted line pattern.
    - *Double* - This option sets the ellipse border style to a double solid line.
    - *Thicksolid* - This option sets the ellipse border style to a thick solid line.
    - *Thickdash* - This option sets the ellipse border style to a thick dashed line.
    - *Thickdot* - This option sets the ellipse border style to a thick dotted line.
    - *Thickdashdot* - This option sets the ellipse border style to a thick dashed dotted line.
    - *Thickdashdotdot* - This option sets the ellipse border style to a thick dashed dotted dotted line pattern.
    - *Thickdouble* - This option sets the ellipse border style to a thick double solid line.
    - *Extrathickdouble* - This option sets the ellipse border style to a double solid line.
  - Color - Use the drop down box to select the desired border color.

## BEHAVIOR

- Angle
  - Use the up/down arrows to determine the degree to which text in the data object is angled. The following options are provided for reference:
    - *0 Degrees* - This option will not rotate the data.
    - *90 Degrees* - This option will rotate the data by 90 degrees or 1/4 turn.
    - *180 Degrees* - This option will rotate the data by 180 degrees or 1/2 turn.
    - *270 Degrees* - This option will rotate the data by 270 degrees or 3/4 turn.
- Auto Scale Font
  - If this option is checked, the font size will automatically be rescaled if/when the size of the data object is changed.
- Multi Line
  - If this option is checked, text in the data object will be wrapped to the next line, if necessary. If the Word Wrap property is not checked, text displayed in the multi line data object will be displayed on the same line.
- Word Wrap
  - If this option is checked, the portion of a long line that extends beyond the current width of the data object is displayed on the next line
- Print When The Following Expression Is True
  - This option determines whether or not the badge data object will print or preview based on the result of an expression. If the expression entered returns a true result, then the object will be printed. If the expression entered returns a false result, then the object will not be printed. An expression can either be typed in manually or built using the expression builder by clicking on the "Edit..." button. For more information on the Expression Builder, see the [Expression Builder](#) help file topic.

## LAYOUT

The following design options for the badge data object can also be set by using the handles on the object and/or by clicking anywhere inside the object and dragging it to the desired location.

- Location
  - Top - Use the up/down arrows to determine the location of the badge data object from the top of the badge design area.
  - Left - Use the up/down arrows to determine the location of the badge data object from the left edge of the badge design area.

- Size


- Height - Use the up/down arrows to determine the height of the badge data object.
- Width - Use the up/down arrows to determine the width of the badge data object.

- Padding

- Left - Use the up/down arrows to determine the amount of padding to the left of text appearing in the badge data object.
- Right - Use the up/down arrows to determine the amount of padding to the right of text appearing in the badge data object.
- Top - Use the up/down arrows to determine the amount of padding above text appearing in the badge data object.
- Bottom - Use the up/down arrows to determine the amount of padding below text appearing in the badge data object.

# BATCH UPDATE/DELETE



Batch Update/Delete is used for updating or deleting groups (batches) of cards from Access It! NExT Step. To perform the Batch Update/Delete, select the Utilities group tab and then click on the  Batch Update/Delete button.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.

## SELECT RECORDS TO UPDATE/DELETE

The first step in Batch Update/Delete is to choose whether to update all cards or only selected cards. If only selected cards are to be updated, click Selected Records and you will be prompted to enter the criteria for those records. Once the desired criteria have been entered, they can be saved for future use by clicking Save Search. Alternatively, if criteria have been created and saved in the past, click Load Search to pull up those criteria.

## BATCH UPDATE

Once Batch Update is selected, use the drop down box to choose the field to be updated and then either enter the new value or use the drop down box to select a value.

## BATCH DELETE

Select this option to perform a delete on a single card or a group of cards.

Extreme caution should be used when performing batch updates or batch deletes. Once performed, both of these actions cannot be reversed. Batch updating or deleting is only recommended for advanced users. A backup of the system database should be performed before performing Batch Update/Delete.


## FINISHED

A summary will be displayed that shows all of the selected batch options. If you wish to change any of your selections, simply click the Back button and make any changes desired. Clicking the Finish button will complete the updating or deleting of the selected cards.

This feature is optional and must be purchased separately

# EXPORT CARD DATA



Export card data is used to export cardholder and card data from the Access It! NExT Step database for use by an external source. Export card data can be used to export data, images and signatures. To export card data, go to the Utilities tab on the toolbar and click the  Export button.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.

## SELECT RECORDS TO EXPORT

Select All Records to export all of the cardholder and card data in the Access It! NExT Step database or choose Selected Records to export only specified data. For more information on finding specific records to export, see the [Finding Cards](#) help file topic.


## SELECT FIELDS TO EXPORT

Select the cardholder and card fields to export. To assign fields to export, select the fields, then "move" the fields that you wish to export from the Available window to the Selected window using the ">>", ">", "<", and "<<" buttons. The ">>" button will move all fields from the Available window to the Selected window. The "<<" button will move all fields from the Selected window to the Available window. Multiple fields can be selected by holding down the <Ctrl> key on the keyboard while selecting (clicking) the desired fields and then using the ">" button to move them. The "<" button will move only the highlighted fields from the Selected window to the Available window. Once fields have been selected, click the Next button. You will then either confirm the Destination Folder for the Export.txt file or click the Select... button to choose an alternate location. Click the Next button again to proceed. To continue with the Export, click the Finish button, to exit without performing the export, click the Cancel button.

This feature is optional and must be purchased separately

# IMPORT CARD DATA



Import card data is used to import cardholder and card data from external sources in to the Access It! NExT Step database. Import card data can import data, images and signatures from a wide variety of sources. To import card data, go to the Utilities tab on the toolbar and click the  Import button.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.

## DATA SOURCE TYPE

Select the data source type for the card data import. The data source type identifies the type of source data to be used for the import. The following data source types are supported:

- *Microsoft Access* - The data source is a Microsoft Access database.
  - File Name - Enter or select the Access database name to import the data from.
  - User Name - If the file is password protected, a user name and password will be required to access it.
  - Password - If the file is password protected, a user name and password will be required to access it.
  - Table/Query - If the Access database contains multiple tables/queries, use the drop down box to select the desired table.
- *Microsoft Excel* - The data source is a Microsoft Excel spreadsheet.
  - File Name - Enter or select the Excel spreadsheet name to import the data from.
  - Sheet Name - Enter or select the Excel worksheet name to import the data from.
  - First row contains column headers - Check this box to indicate that the first row contains headers so this data is not included in the import.
- *Microsoft SQL Server* - The data source is a Microsoft SQL Server database.
  - SQL Server - Enter or select the SQL Server database name to import the data from.
  - Authentication - Use the drop down box to select the desired authentication type.
  - User Name - If the file is password protected, a user name and password will be required to access it.
  - Password - If the file is password protected, a user name and password will be required to access it.
  - Database - Enter or select the database name to import the data from.
  - Table - Enter or select the table name to import the data from.
- *Text File* - The data source is a comma or tab delimited plain text file.
  - File Name - Enter or select the Text file name to import the data from.



- o First row contains column headers - Check this box to indicate that the first row contains headers so this data is not included in the import.

## SELECT/PREVIEW DATA TO BE IMPORTED

Select the data to be imported. Once selected, a sample preview of the data to be imported will be displayed. The parameters for the data being displayed will depend upon the data source type selected. Click the Next button to assign source fields to destination fields.

## ASSIGNING SOURCE FIELDS TO DESTINATION FIELDS

To assign source fields to destination fields, select the desired source field via the drop down box for that source field. To assign a static value to a destination field select (Static Value) in the desired source field drop down box and enter the actual static value in the associated Details box. Field maps can then be saved and loaded for reuse by clicking the Save Map button.

The list of destination fields is dependent upon the options set for the current site. For example if the number of access levels per card is set to six per card for the current site only six access level destination fields will be displayed.

## READY TO IMPORT

Click on the Finish button to begin the import. A progress bar will display the percentage of completion as the import progresses. After the import completes a text file will be created listing error messages if any errors have occurred.

This feature is optional and must be purchased separately




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## ARCHIVING



Archiving is used to transfer events from the current events data file to an archive data file. Each time an archive is performed, a new archive event file is created. The archive data files are created and named with a date/timestamp combination appended to "Events" and are written to the application data folder.

## ARCHIVING EVENTS

To get to the Archive screen, click on the  Archives button within the Utilities group on the toolbar. To perform an archive, click the Archive Now button. It is recommended that an archive be performed on a regular basis to prevent the events data file from becoming too large. How often to archive will depend upon the number of card holders in the system and how many events are being generated. The system will force the current events to be archived when the size of the current events data file reaches 100MB.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.

## PRINTING ARCHIVE EVENTS

To print the contents of an archive event file, first go to the Archive screen by clicking on the  Archives button within the Utilities group on the toolbar. The approximate date of the event(s) to be printed must be known. To access the archive event files available for printing, click the  Printer button. This will cause the Event Listing window to pop up. From the Event Listing window, you have the option to print the entire contents of the archive file selected. To do so, leave the Beginning Date/Time and Ending Date/Time as they appear and click the Finish button. The Event Listing Report will appear in a new window from which it can be previewed or sent to a printer.

In addition to printing the entire Events file selected, the contents of the Event Listing Report can be narrowed down by specifying any combination of the following criteria: date range, card numbers, cardholders, event types, locations, and users. To specify criteria, after an events file has been selected, click the Next button to page through the screen to select specific criteria. First, use the up/down arrows to modify the Beginning Date/Time and Ending Date/Time. Next, to select only specific card numbers, click the Selected Card Numbers toggle button and use the ">>", ">", "<", and "<<" buttons to select the desired card numbers.

# FIRMWARE UPDATES

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Firmware updates are used to download firmware to the panel. The firmware in the panel is "flashed" into the on board ROM on the panel automatically by the Access It! NExT Step software.

## UPDATING FIRMWARE

The panel firmware is automatically verified and updated each time the Access It! NExT Step software is run. The firmware revision in the panel is checked at startup and new firmware will be downloaded automatically if necessary. This is accomplished by searching the application directory upon startup for any files with a .CRC file extension. The firmware in the panel is then compared with the file on the local PC hard disk. If a firmware update is necessary, it will take place automatically. The panel firmware file is installed along with the Access It! NExT Step software application. It is only necessary to replace the default file when new approved firmware revisions become available.

**Firmware update files should only be placed in the application directory when directed to do so by the Access It! NExT Step technical support staff. Downloading the wrong firmware to the panel can adversely affect the functionality of the system.**


Events are recorded in the event file every time something happens within the system. Card transactions, data being edited, commands being issued to doors are all events that are displayed in the Access It! NExT Step events window and recorded in the system event file. The system event file will retain all of the current events until an archive is performed. For more information on archiving events, refer to the [Archive](#) help file topic.

## VIEWING EVENTS

Events can be viewed at any time in the lower window of Access It! NExT Step desktop. All of the events for sites that the currently logged in user has access to should be displayed here.

The events window can be paused to view previous events and prevent the viewer from jumping to the bottom of the list every time a new event is displayed. This is accomplished by clicking on the Pause button on the events window toolbar. The scroll bar can then be used to scroll backwards and forwards through all of the events in the current event file. Click on the Resume button on the events window toolbar to resume normal event viewing. Cardholder information can be viewed for card related events by clicking the Show Cardholders button.





## PRINTING EVENTS

To print events, the approximate date of the event(s) to be printed must be known. Events can be printed by clicking on the  Print button. This will cause the Event Listing window to pop up. From the Event Listing window, you have the option to print the entire contents of the archive file selected. To do so, leave the Beginning Date/Time and Ending Date/Time as they appear and click the Finish button. The Event Listing Report will appear in a new window from which it can be previewed or sent to a printer.

In addition to printing the entire Events file selected, the contents of the Event Listing Report can be narrowed down by specifying any combination of the following criteria: date range, card numbers, cardholders, event types, locations, and users. To specify criteria, after an events file has been selected, click the Next button to page through the screen to select specific criteria. First, use the up/down arrows to modify the Beginning Date/Time and Ending Date/Time. Next, to select only specific card numbers, click the Selected Card Numbers toggle button and use the ">>", ">", "<", and "<<" buttons to select the desired card numbers.

# CARD FORMATS



Card formats are used to specify the type of readers and cards being used in a system. The card format contains the number coded instructions that inform the panel of the card format being used. To get to the Card Formats screen, click on the System Tab and then select  Card Formats. To add a new card format, click  New on the toolbar To edit an existing card format either click  Edit on the toolbar . An explanation of the card format fields follows. To delete a card format either click  Delete on the toolbar. Confirmation of the deletion will be requested. Click Yes to continue with the deletion, click No to exit without deleting.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic.

## CARD FORMAT NAME

Enter the format name of the card format being specified. The name is used to identify the card format when it is being selected during configuration. For more information on configuration, see the [Configuration](#) help file topic. It is recommended that a friendly name be assigned to all of the card formats being used. An example of a friendly name would be "Custom 37 Bit Wiegand". The format name can be up to 50 characters in length.

## CARD TYPE

Select the type of card being used.

## CARD LAYOUT-WIEGAND

Enter the card layout parameters for the card format being specified. This information will generally be provided by the reader or card manufacturer. The following parameters are supported in the format string:

- *Number of Bits* - This parameter is the total number of bits on the card.
- *Number of Bits to Sum for Even Parity* - This parameter is the number of bits to sum for even parity.
- *Address to Start From* - This parameter is the bit address to start summing for even parity.
- *Number of Bits to Sum for Odd Parity* - This parameter is number of bits to sum for odd parity.
- *Address to Start From* - This parameter is the bit address to start summing for odd parity.
- *Number of Facility Code Bits* - This parameter is the number of facility code bits.
- *Address to Start From* - This parameter is the bit address to start the facility code.

- *Number of Cardholder ID Bits* - This parameter is the number of card number bits.
- *Address to Start From* - This parameter is the bit address to start the card number.

## OPTIONS-WIEGAND

- Step parity calculation by 2 bits.
- Suppress facility code checking.
- Corporate card mode.
- 37-bit parity test with 4 parity bits.
- 37-bit parity test with 2 parity bits.
- Keypad Mode
  - No keypad
  - HID
  - Motorola/Indala
- LED Drive Mode
  - 1-Wire
  - Separate Red/Green
  - Dorado-780

## CARD LAYOUT-MAG STRIPE

- *Minimum Number of Digits on Card* - This parameter is the total minimum number of digits on the card.
- *Maximum Number of Digits on Card* - This parameter is the total maximum number of digits on the card.
- *Number of Facility Code Digits* - This parameter is the number of facility code digits.
- *Address to Start From* - This parameter is for indexing to the most significant digit.
- *Number of Cardholder ID Digits* - This parameter is the number of card number digits.
- *Address to Start From* - This parameter is for indexing to the most significant digit.

## OPTIONS-MAG STRIPE

- Suppress facility code checking
- Corporate card mode
- Keypad Mode
  - No keypad
  - MR-20 with tamper
  - MR-20 no tamper

- LED Drive Mode
  - 1-Wire
  - Separate Red-Green
  - Dorado-780

Entering an invalid card format can compromise the security and functionality of the system.


# DEBUGGING



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Debugging is used to control the writing of diagnostic information to a text file on the PC. This text file is used by Access It! NExT Step support personnel to help diagnose system problems. Debugging is used for diagnostic purposes only and should never be used for the daily operation of the system.

## DEBUGGING

To turn on debugging, click on the System group tab on the left hand side of the Access It! NExT Step desktop window and then click the  Diagnostics Button. Next, from the Diagnostic window, click the Debug On button. This will create a text file on the local PC's hard disk, in the application directory, called debug.txt. This file may be requested by Access It! NExT Step support personnel for troubleshooting purposes.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic. Debugging is only recommended for use with the assistance of the Access It! NExT Step technical support staff. Leaving debugging enabled can decrease the overall performance of the system and the debug file on the local hard disk will get very large and consume hard disk space.




# DIRECT COMMANDS

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Direct commands are used to send direct numeric commands to the panel. Direct commands are used for diagnostic purposes only and should never be used for the daily operation of the system. There are many direct commands available and discussing them here is beyond the scope of this help file. Direct command usage may be requested by Access It! NExT Step support personnel.

## DIRECT COMMAND

To send direct commands, click on the Hardware Group tab and select  Panel. Next, click the Request Status drop down button on the toolbar and select Direct Command. Enter the direct command to be sent to the panel. Click the OK button to send the command to the panel immediately, or click Cancel to abort sending the command.

Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic. Direct commands can be very complex and are only recommended to be used by advanced users with the assistance of the Access It! NExT Step technical support staff. Sending an invalid direct command can compromise the security and functionality of the system.


# PANEL DIAGNOSTICS

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Panel diagnostics are used to view the Access It! NExT Step software's communications with the panel. Panel diagnostics are used for troubleshooting purposes only and should never be used for the daily operation of the system. All communications between the panel and the Access It! NExT Step software will be displayed in the diagnostics window.

## RUNNING PANEL DIAGNOSTICS

To run the Panel Diagnostics, click the System group tab and then select  Diagnostics. The Diagnostics window will appear on the desktop. All low level communication with the panel will now be displayed in the diagnostics window. It is beyond the scope of this help file to document the communications information being displayed. This information is used by Access It! NExT Step support personnel for troubleshooting purposes only. The display can be paused, resumed, or cleared by clicking the appropriate buttons on the toolbar. In addition, the debugging function can be turned on or off from this screen by clicking the appropriate button. For additional information on debugging, see the [Debugging](#) help file topic.

**Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic. Running the panel diagnostics can decrease the overall performance of the system.**


# RESETTING THE PANEL

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Resetting the panel is used to perform a reset, or "cold start" of the panel. Resetting the panel will cause the panel's memory to be cleared and all system data files to be sent down to the panel. Resetting the panel can be useful for troubleshooting system problems.

## RESETTING THE PANEL

To reset the panel, click on the Hardware group tab and select  Panel. Next, click the Request Status drop down button on the toolbar and select Reset Panel.

*Access to this screen is determined by the settings for the currently logged in user. For more information on users, see the [Users](#) help file topic. Resetting the panel will cause the system to be non-functional for a short period of time while the is running an internal memory test.*