SOFT-ASSISTANT

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1. CHARACTERISTICS OF THE SOFT-ASSISTANT

Soft-ASSISTANT is installation management software.

1.1 ITS FUNCTIONS

The functions that can be carried out using the Soft-ASSISTANT are as follows:

- Installation management
- Configuration of equipment from the MOTION range

1.2 MINIMUM SYSTEM REQUIREMENTS

Supported OS:

- Windows XP-SP3, Vista 32-SP1 / 64-SP1, Windows7 32/64, Server 2003 R2, 2008 and 2008 R2

Hardware:

- Pentium 4
- 512 Mbytes of RAM
- 350 Mbytes of free hard drive
- Free USB port
- ASSISTANT

1.3 MATERIAL SUPPLIED WITH THE ASSISTANT

The ASSISTANT is made up of the following parts:

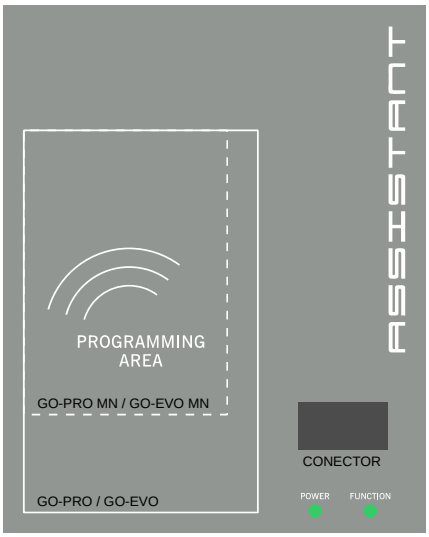
- USB memory stick containing the Soft-ASSISTANT management programme.
- USB cable to connect the ASSISTANT to the PC.
- Installation guide.
- ASSISTANT programming tool.

2. OPERATING

2.1 GENERAL

The Assistant programmer is a tabletop tool for installation management.

The equipment can be connected to the PC using the USB cable supplied. The POWER light indicates the correct power supply to the equipment. The FUNCTION light indicates that the programmer is running. The area marked as PROGRAMMING AREA is where the operating devices must be located. The memory cards are inserted in the connector at the front of the equipment. The cable configuration control boards is also inserted into the connector.



Connection status

The status button indicates the connection status. If it is red, this indicates that the programmer is not connected to the PC. If it is green, the connection is correct. By clicking on the status button the programme indicates whether the Assistant is correctly connected to the Soft-Assistant programme or not.

Connections

USB connector
Memory and event card connector

Programming of different devices (see Section 4.6 ASSISTANT)

Transmitters
Proximity elements
Memory and event cards
Receivers
Access control stations

2.2 INSTALLATION TYPES

Local
A single workstation with its database.

Server
A workstation with a common database on that all the network clients can operate.

Client
Several workstations connected to a server housing a common database.

Mobile
A mobile station can have its database available while remaining disconnected from the server. The user may synchronize their database with that of the server starting the session with the Server and synchronizing the data.

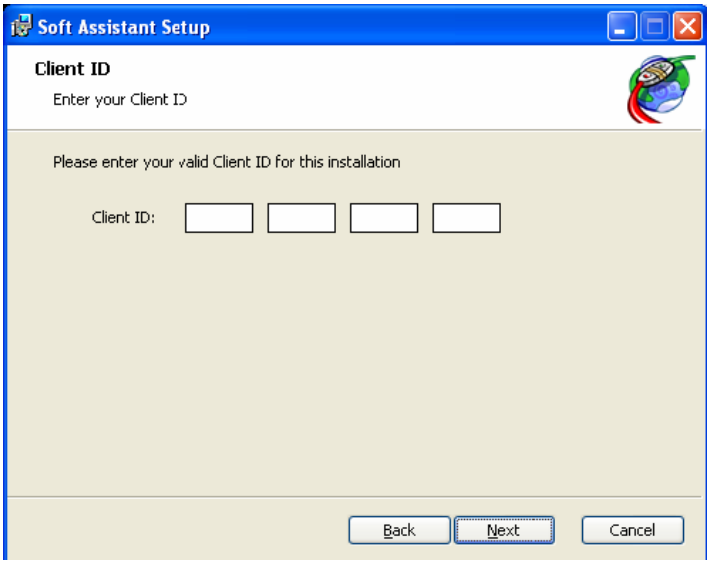
3. INSTALLATION INSTRUCTIONS

3.1 SOFTWARE INSTALLATION

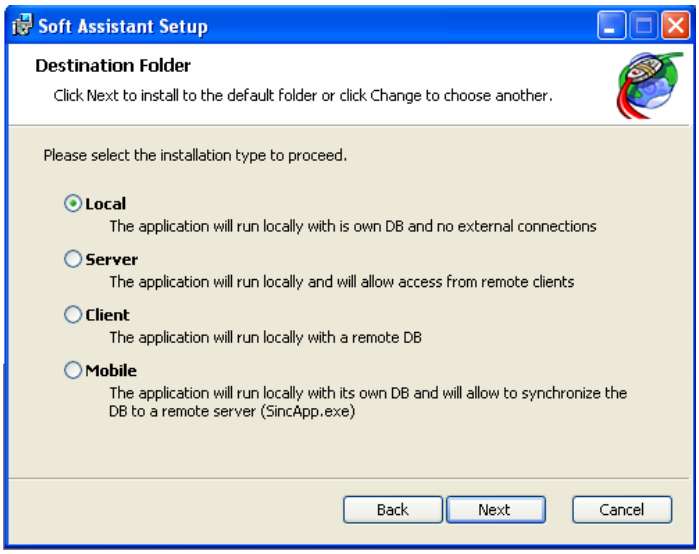
Before installing the new software, you should make a backup of your database.

Insert the USB memory stick inside a USB port. The Soft-ASSISTANT setup application will then start automatically.

Enter the register code which is on the label at bottom part of the USB stick.

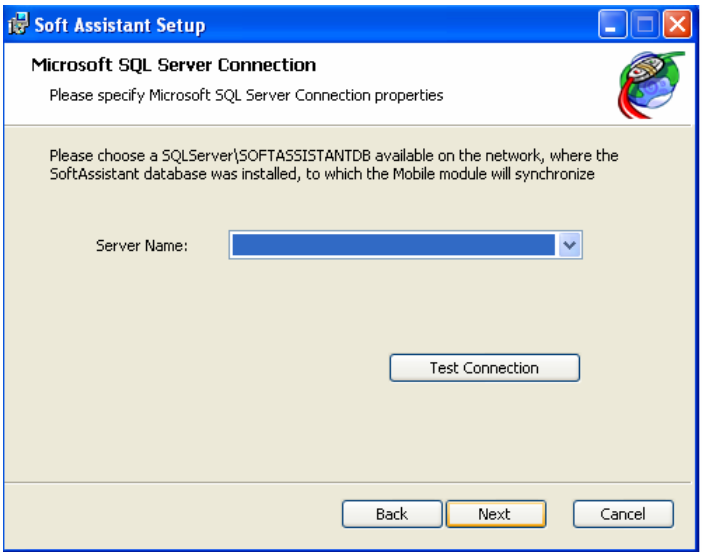


Select the type of installation.



In the case of **Server installation**, the programme must first be installed in the server and then in the remaining workstations, in which will operate as Client.

In the case of **Client or Mobile installation**, the Server database must be selected. Press Test Connection for checking the connection.



Warning: *Once finished the installation process, it will not be able to change the installation type.*

3.2 DRIVERS INSTALLATION

Insert the USB memory stick in a USB port of the PC. Connect the USB cable to the programmer and the PC. A window will open on the PC containing the message "New hardware found" and the Windows assistant for new hardware found will auto-run. Follow the instructions given on screen. During hardware installation, the assistant will ask you to select the USB driver path. Select the USB unit.

3.3 RUNNING

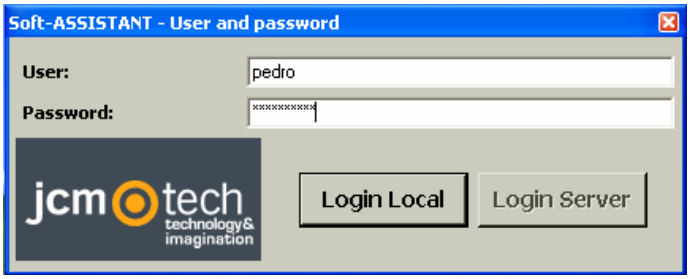
On running the application, the programme will request a login and password. The login is "softadmin" and the password is "assistant" by default.

User:	softadmin
Password:	assistant

4. USER MANUAL

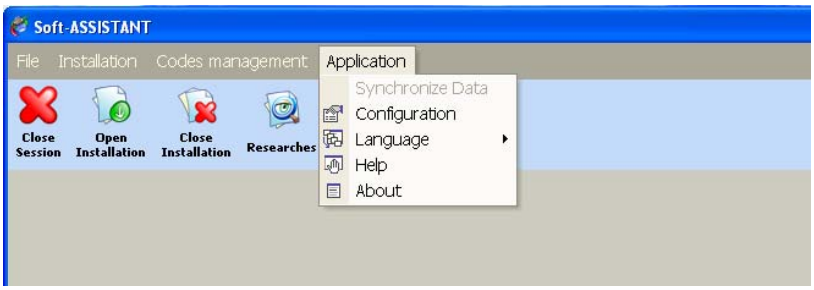
4.1 APPLICATION

On running the application, a form will appear to enter the login and password.



4.2 CONFIGURATION

From the main menu bar, click on Application, Configuration and the application configuration window will appear.



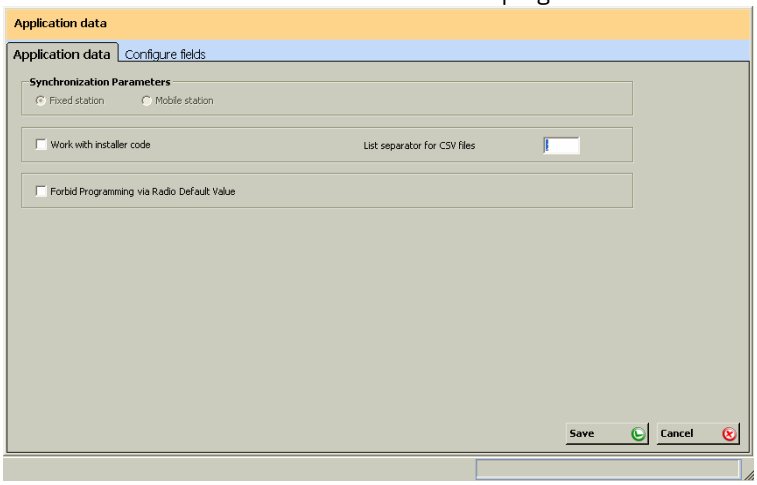
This window can be used to update all the data related to general application and application user information. Three tabs will appear that correspond to the following configurable data.

4.2.1 Application data

This allows for the workstation data to be recorded.

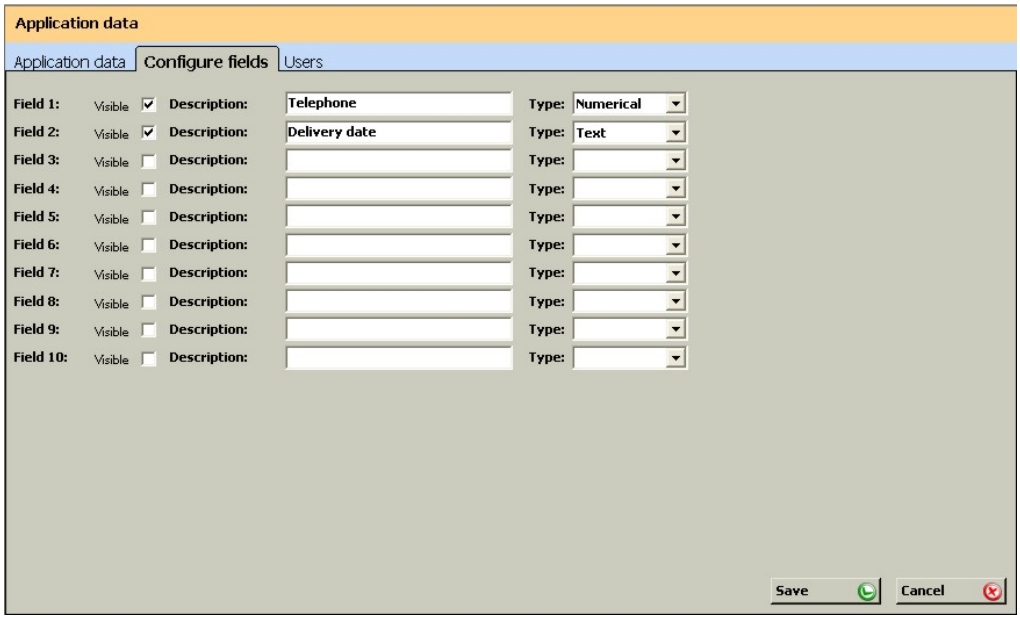
Note 1: If the user always works with an installer code, it may be marked in this window. All the new installations carried out from then onwards will have an installer code by default.

Note 2: If the user wants to forbid the programmation via radio, it may be marked in this window. All the new installations carried out from then onwards will have forbidden the programmation via radio



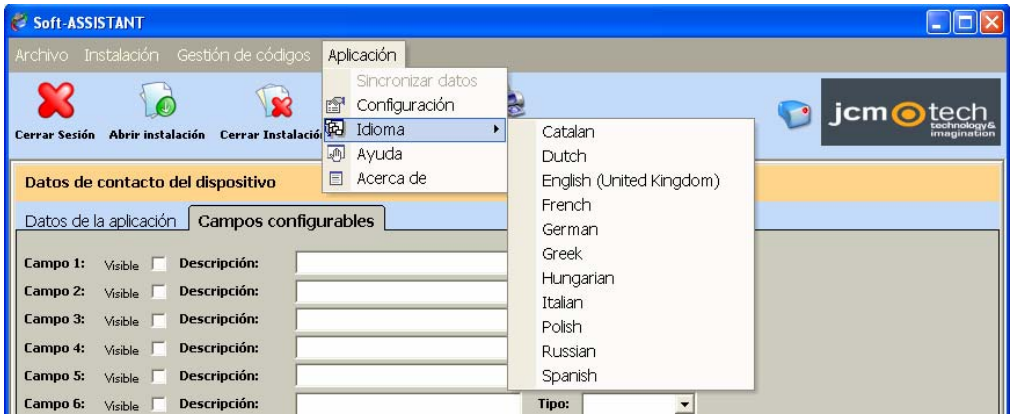
4.2.2 Configurable fields

This allows for a series of fields to be configured, their format chosen and whether they are to be visible fields (those appearing in the search lists). Example: field name (Telephone) and type (Numerical).



4.3 LANGUAGE

To change the application language, click on Application and Language on the menu bar and choose the required language. The initial window will appear where you must enter your login and password again. On entering, the language will have changed automatically.



4.4 SESSION

To begin a session, click on File, Close Session on the menu bar or Close Session on the tool bar. A form will appear to enter a new login and password.

In the event of you forgetting your login and/or password, contact the system administrator.
The start of a session conditions the possibilities of action for users according to the profile allocated.
A session must be started for the system to be initialised, although another session can be started at any time.

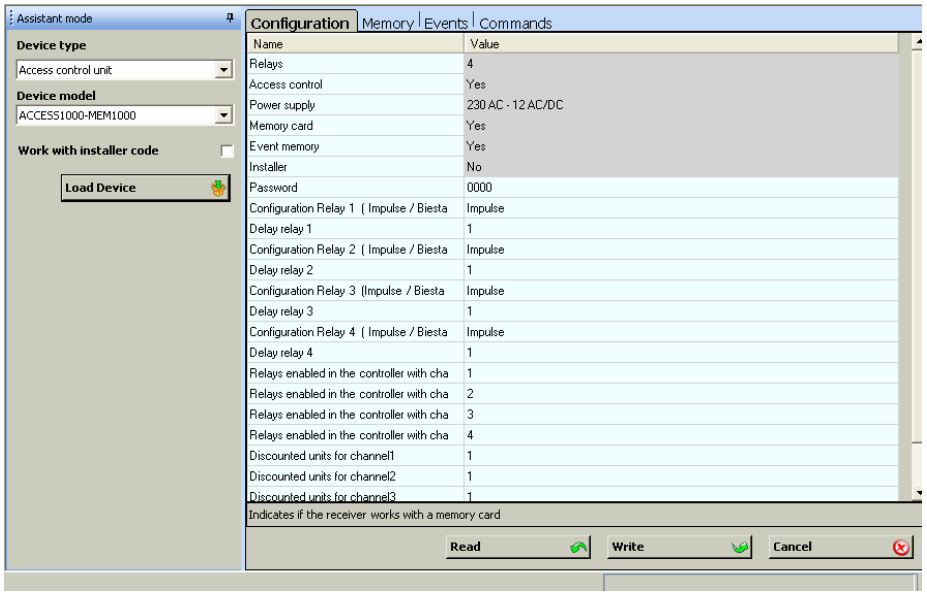
Exit: This menu option ends the application.

4.5 ASSISTANT

This allows for independent work with any device (e.g. add installer code). The Assistant programming tool must be connected for this.

To run this option, click on the Assistant button on the tool bar.

Select the device type and model, click on Load device and a window will appear on the right containing the options and functions available for the selected device.



4.5.1 Options and functions (driver)

- **Configuration:** this allows for the device configuration to be read, changed and saved to the device. The fields with a shaded value cannot be modified.
- **Memory:** This allows for the contents of a device's memory to be read, modified and saved to the device.
- **Events:** This allows for the contents of an events card in a device to be read and formatted.
- **Commands:** this shows a series of functions that can be carried out on the device (e.g. formatting a memory in the case of a receiver)

To modify any field, double click on the field to be modified with the left-hand button of the mouse. Any modification made will be indicated by a colour change on the line modified.

4.5.2 Devices

4.5.2.1 Emisores

a) GO-PRO (GO-PRO 2: GO-PRO MINI, GOPRO-PUSH, GOBUTTONPRO, GO-SW-PRO; GO-PRO 4: FREE-T, GO-KEYPRO)

Configuration	
Name	**Description**
Device information	Non-editable device characteristics data
PIN configuration	Configuration of the PIN, the expired PIN and the relays with PIN to be allocated to each channel
Replacement	

Commands	
Command	**Description**
FORMAT	This eliminates the installer code from the device
SET INSTALL	This inserts the installer code in the device
SELECT	Reserved function

Note: When you operate with GO-KEYPRO-E or GO-KEYPRO-S, you should take out the backwards box of these devices for approaching them to the programming area.

b) GO-EVO (GO-EVO 2: GO-EVO MINI; GO-EVO 4)

Configuration	
Name	**Description**
Device information	Data of non-editable characteristics of the device
PIN Configuration	Configuration of the PIN, of the expired PIN and of the relays with PIN that the user wishes to assign to each channel
Replacement	Configurable 6-digit code
Validity period	Validity start and end dates
Alarm function	Relay alarm configuration and number of readings

Commands	
Command	**Description**
FORMAT	Deletes the device installer code
SET INSTALL	Inserts the installer code in the device
SELECT	Reserved function

c) ECO-TAG

Configuration	
Name	**Description**
Device information	Data of non-editable characteristics of the device

Commands	
Command	**Description**
FORMAT	Deletes the device installer code
SET INSTALL	Inserts the installer code in the device
CHANGE_CODE	Modifies the device code
RESTORE_CODE	Restores the factory-installed device code
SELECT	Reserved function

d) MOTION-TAG / MOTION-CARD

Configuration	
Name	**Description**
Device information	Data of non-editable characteristics of the device
PIN Configuration	Configuration of the PIN, of the expired PIN and of the relays with PIN that the user wishes to assign to each channel
Replacement	Configurable 6-digit code
Validity period	Validity start and end dates
Alarm function	Relay alarm configuration and number of readings

Commands	
Command	**Description**
FORMAT	Deletes the device installer code
SET INSTALL	Inserts the installer code in the device
CHANGE_CODE	Modifies the device code
RESTORE_CODE	Restores the factory-installed device code
SELECT	Reserved function

e) EVO-TAG / EVO-CARD

Configuration	
Name	**Description**
Device information	Data of non-editable characteristics of the device
PIN Configuration	Configuration of the PIN, of the expired PIN and of the relays with PIN that the user wishes to assign to each channel
Replacement	Configurable 6-digit code
Validity period	Validity start and end dates
Alarm function	Relay alarm configuration and number of readings
Pre-payment function	Configuration of the PIN and pre-payment credit

Commands	
Command	**Description**
FORMAT	Deletes the device installer code
SET INSTALL	Inserts the installer code in the device
CHANGE_CODE	Modifies the device code
RESTORE_CODE	Restores the factory-installed device code
SELECT	Reserved function

4.5.2.2 Receptores

a) 15-CODE RECEIVERS

Configuration	
Name	**Description**
Device information	Data of non-editable characteristics of the device
PIN Configuration	Configuration of the PIN, of the expired PIN and of the relays with PIN that the user wishes to assign to each channel
Advanced configuration	Prohibits radio / manual programming and configures relay 1 as bistable

Commands	
Command	**Description**
PIN RADIO	Configures the PIN in the receiver via radio

b) 500-CODE RECEIVERS

Configuration	
Name	**Description**
Device information	Non-editable device characteristics data
PIN configuration	Configuration of the PIN, the expired PIN and the relays with PIN to be allocated to each channel
Advanced configuration	Forbids radio / manual programming
Minimum device	Sets the minimum device to operate on the equipment

Commands	
Command	**Description**
FORMAT	Resets the memory card
SET INSTALL	This inserts the installer code in the card
PIN RADIO	Configures the PIN on the receiver by radio
UPDATE	Updates the Assistant firmware

4.5.2.3 Access control panels 500 / 1000 / 2000 codes

Configuration	
Name	**Description**
Device information	Data of non-editable characteristics of the device
Password	Configurable 4-digit number (by programme default it is 0000)
Configuration / Timing of relays	Configuration of relays (impulse / bistable / anti-panic) and timing
Minimum device	Sets the minimum device to function in the unit

Commands	
Command	**Description**
FORMAT	Resets memory card and deletes installer code
SET INSTALL	Inserts installer code in the card
UPDATE	Creates firmware update card

4.5.2.4 Accessories

Configuration	
Name	**Description**
Device information	Data of non-editable characteristics of the device
Wiegand 26 Format	Selection of the format with or without Sitecode
Sitecode	Configurable code from 0 to 255

Commands	
Command	**Description**
W26 RADIO	Configures the unit via radio

4.5.2.5 Control panel

a) ROLLER-MOTION

Configuration	
Name	**Description**
Device information	Data of non-editable characteristics of the device
PIN Configuration	Configuration of the PIN, of the expired PIN and of the relays with PIN that the user wishes to assign to each channel
Advanced configuration	Prohibits radio/ manual programming and configures relay 1 as bistable

Commands	
Command	**Description**
PIN RADIO	Configures the PIN in the receiver via radio

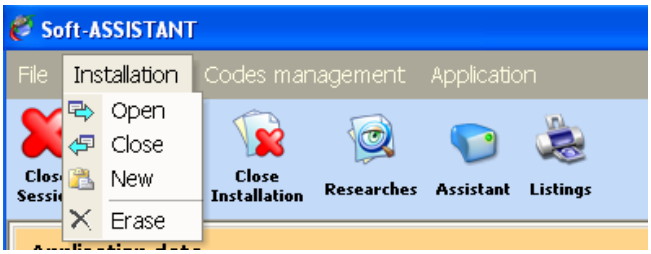
4.5.2.6 Programming tool

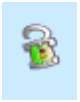
Configuration	
Name	**Description**
Boot version	This allows for the operative system version of the Assistant to be read
Firm version	This allows for the programme version of the Assistant to be read

Commands	
Command	**Description**
UPDATE	Updates the Assistant firmware

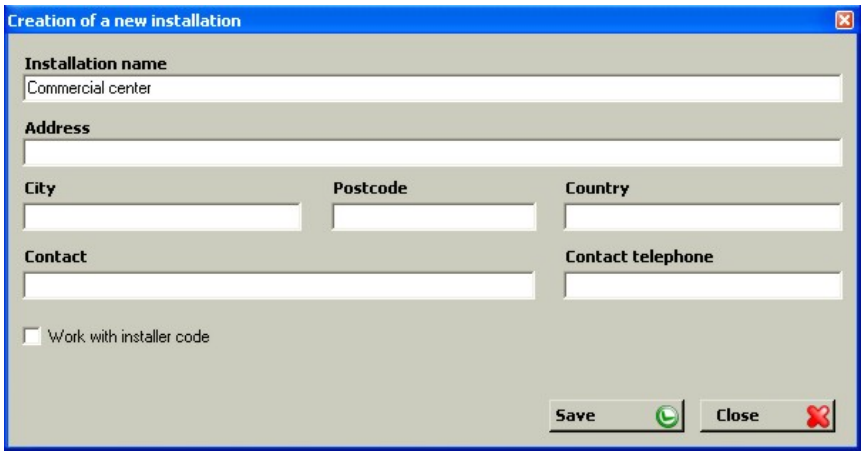
4.6 WORK WITH INSTALLATIONS

- ***Open***: this opens the existing installation. At the main menu, click on Installation and Open and a list of all existing installations will open. This allows for an installation to be sought by name, address or person to contact or those that are awaiting maintenance. This list can be exported to Excel.
- ***New*****:** this creates a new installation
- ***Close***: new installation
- ***Delete***: this deletes an installation



On opening an installation, this icon  will appear. If the installation has no installer code, the icon will be open and green. If the installation has an installer code, the icon will be closed and red.

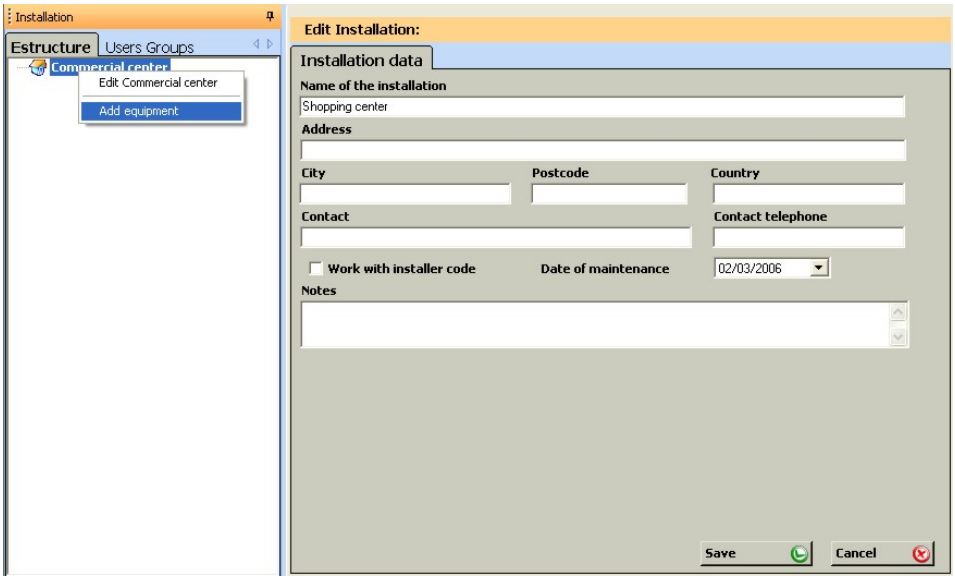
4.6.1 Creation of a new installation



Complete the fields on the new installation creation form and click on Save. A window will appear with two tabs on the left: Structure and User Group.
To access the different options of the Structure Tree and the User Group Tree, click with the right-hand button of the mouse on the line of the tree to be operated and a pop-up menu will appear containing these options.

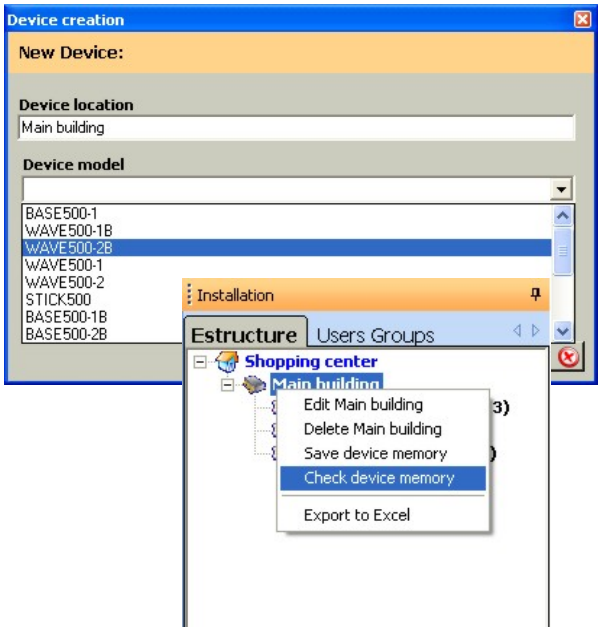
4.6.1.1 Structure

This shows an installation with all its associated devices.

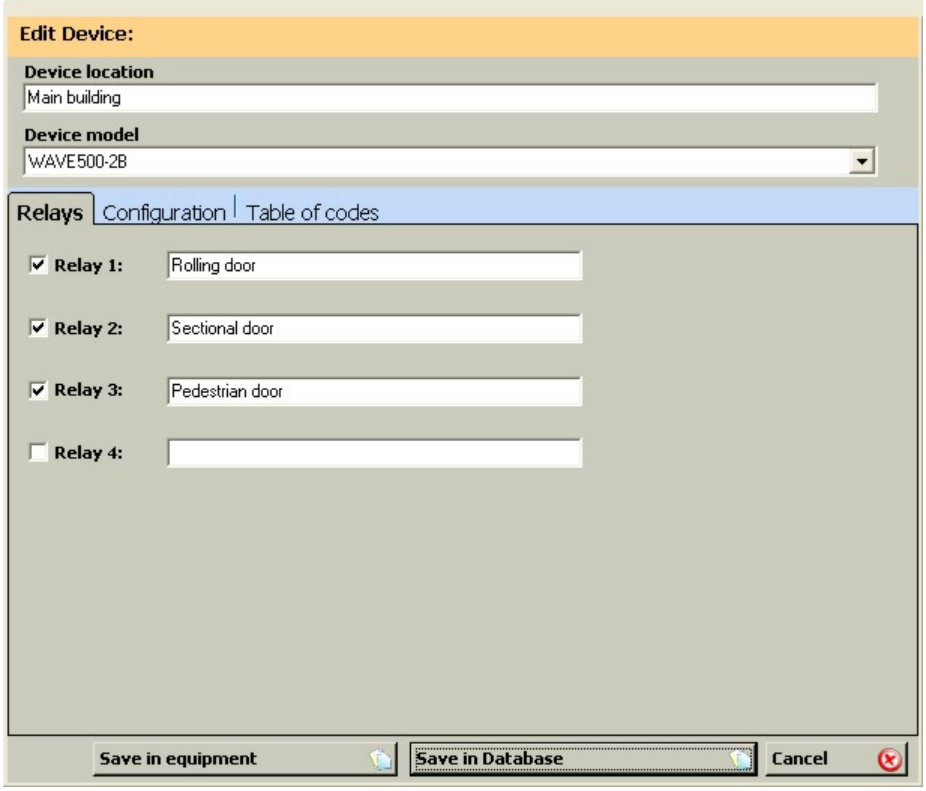


The Maintenance date serves to provide a warning when it is necessary to carry out maintenance on the installation. On running the programme on the aforementioned maintenance date, a screen opens reminding the user that they have installations awaiting maintenance and asks whether they wish to review them at that time. If the answer is affirmative, a further screen opens displaying the list of installations awaiting maintenance. This list can be exported to Excel.

a) ***Add equipment***: This allocates the equipment location and selects the model from the form.



b) ***Edit equipment:*** A form with three tabs will appear: Relays (where the active relays can be configured), Configuration (pin, relay timer, etc.) and Code table (memory position, code, relay/channel configuration and counter, etc.).



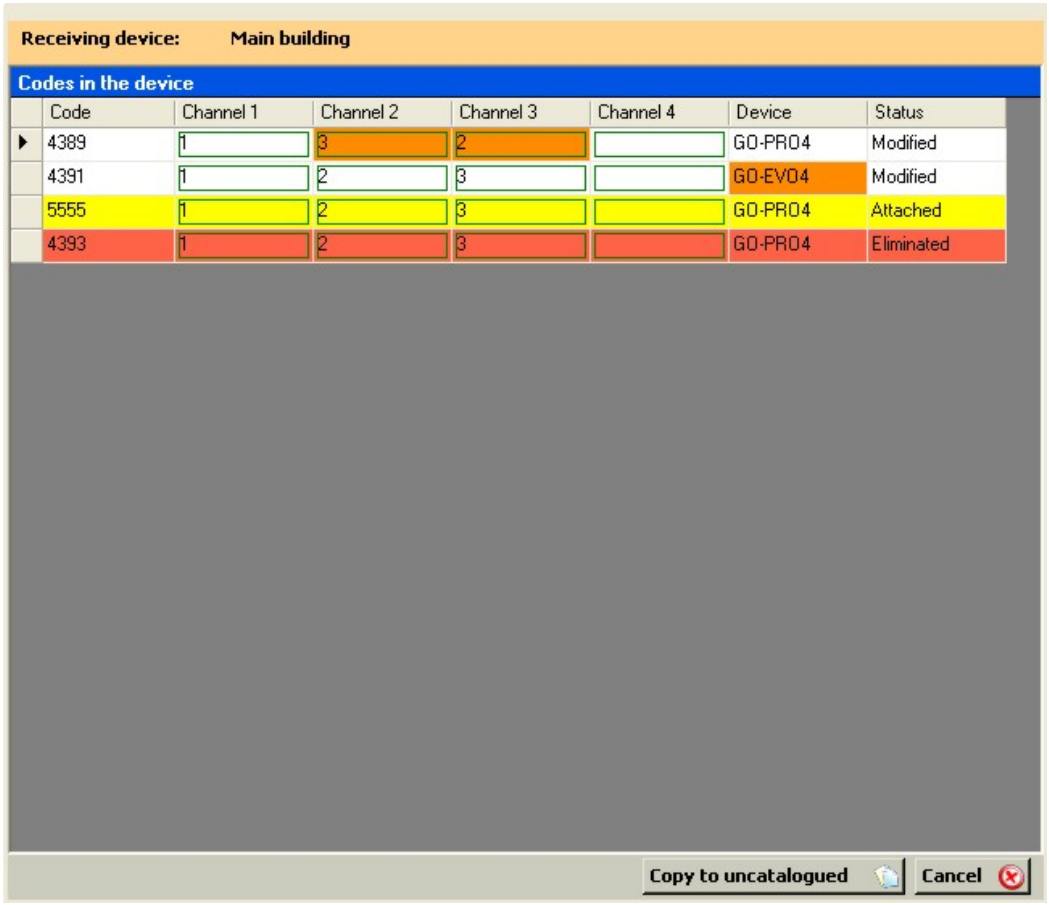
Note: It is possible to change the unit model. If this is done, some configuration data may be lost. They must be checked again.

Once the installation with its equipment has been created, it will appear in the structure tree.

c) ***Delete equipment***: This allows for the equipment selected to be deleted.

d) ***Save equipment memory***: This saves the codes generated and configuration of the device modified by the programme to the equipment memory (this memory must be inserted in the Assistant programmer).

e) ***Check unit memory:*** Reads the memory card of the selected unit and compares it with the information stored in the database.



If the content is not identical, the differences will be displayed on the screen, indicating whether added, deleted or modified codes have been found.

By clicking on the Copy to unlisted button, all the added codes will be inserted in the database in the Unlisted group (created automatically by the programme). From the list of this group it is possible to cut and paste the codes to the corresponding group.

The modified codes with differences in the channel columns are due to a configuration error in the group or to the fact that they are not in the proper group. The cut and paste or configure group options may be used in order to solve the problem.
The modified codes with differences in the Device column may be changed manually in the list of groups where the code is found.

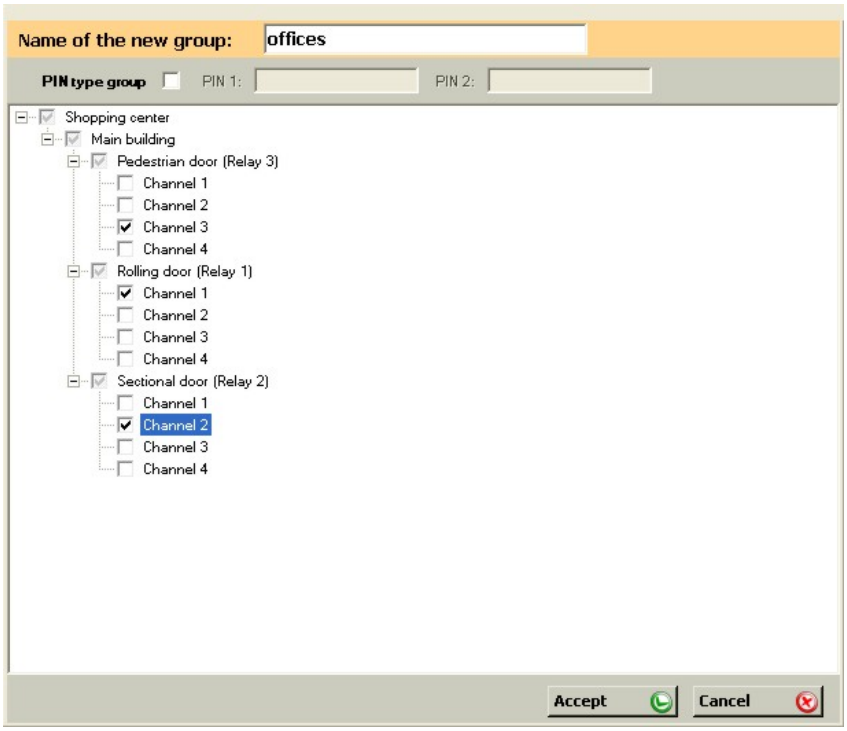
It will be possible to insert the deleted codes into the memory card by clicking on the Record memory option or delete them manually from the database in the list of groups.

f) ***Export to Excel***: This allows for the contents of the memory to be exported for work in Excel.

4.6.1.2 User groups

The creation of user groups enables you to effectively manage access to different areas of the installation.
Each user group can access the previously selected area, each of the devices and relays for said devices being considered an area. Thus, the channel to operate in each relay can be selected.

a) ***Add group***: On adding a group, a form will appear on the right of the screen where a name must be allocated to the group and the configuration required for devices, relays and channels chosen.



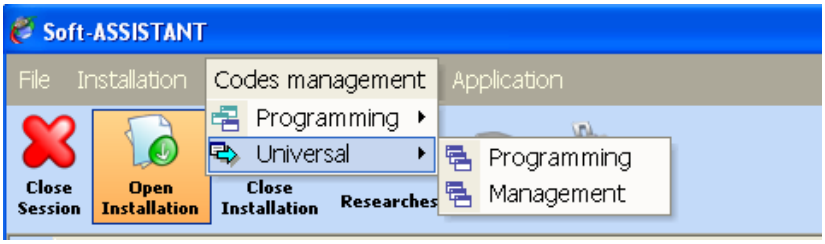
b) ***Delete group***: This allows for the group selected to be deleted.
c) ***Group list:*** A table will appear (code, type, group, name, contact, ID number, place, visible configurable fields)

To list all groups: choose the List ALL option from Group.
To list one group: choose the List group option from the selected group.

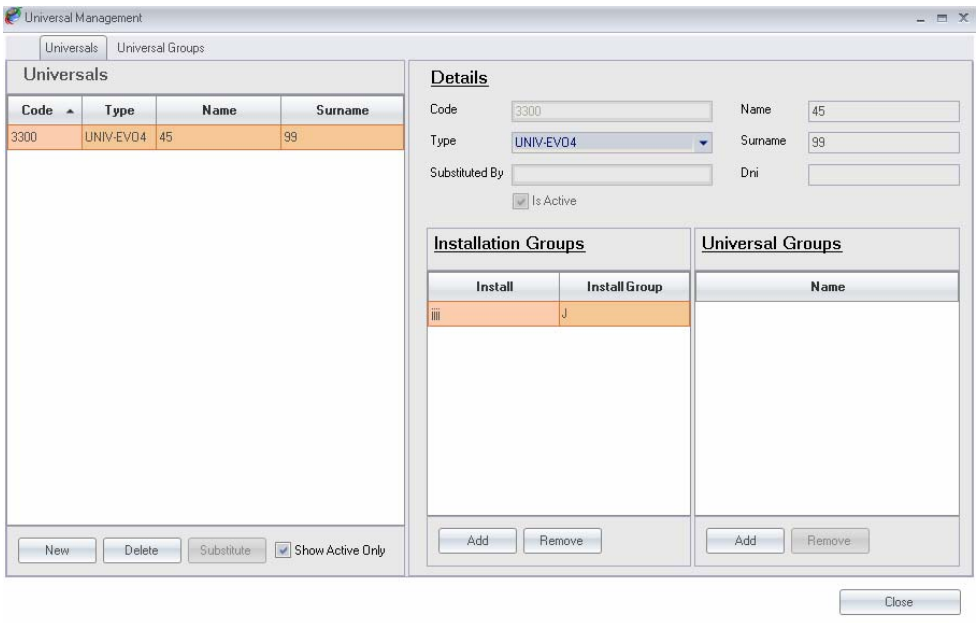
d) ***Configure group***: this allows for the selected group to be edited and its configuration changed.
e) ***Export to Excel***: This allows for the user list of a group to be exported to edit its data in Excel.
f) ***Import from Excel***: This allows for data on the users in a group be imported from an Excel file. "Attention! If you have entered user data manually, they will be overwritten by the data imported from Excel."

4.6.1.3 Universal code

Universal codes are used by installation installers or maintenance staff. Thus, a single device may be associated to all the required installations.
Before registering a universal code, the programme must be entered manually.
On the menu bar, go to Code Management, Universal and then Management.

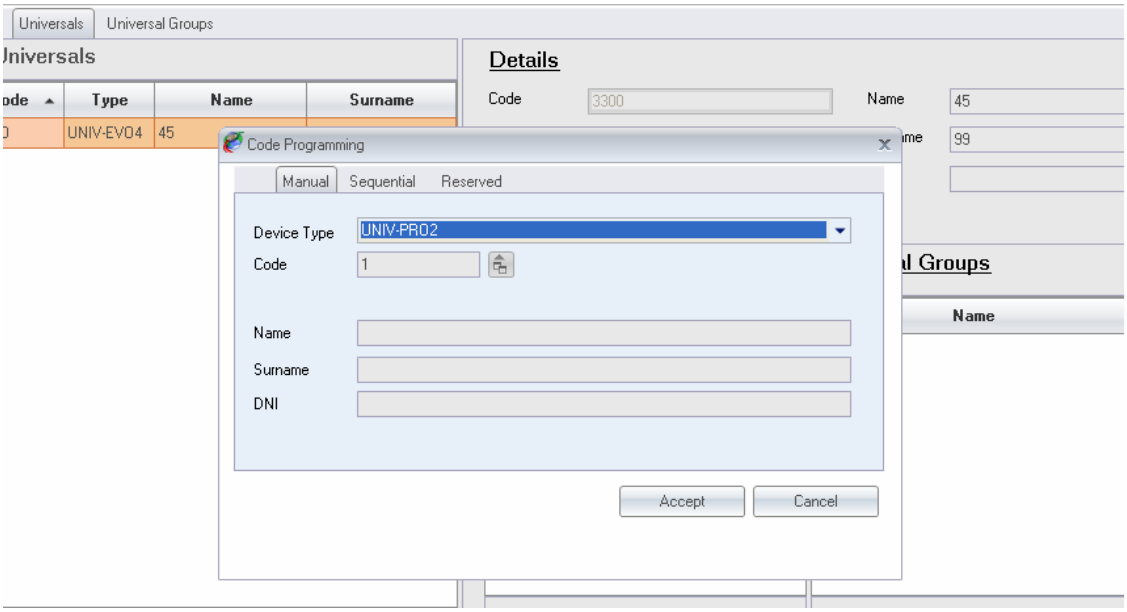


The universal management window will appear, containing on the left a list of universal codes entered, on the center a list of all installation groups assigned at each code and on the right a list of all universal groups which each code belongs to.



To enter a new universal code, click on New. Select the device model from the device type list and enter its code using the keypad or click on the field with the right-hand button of the mouse to enter the code by radio. Complete the information fields (optional although highly recommended).

On accepting, the programme lists the codes entered.



To assign an installation group to an universal code, click on add, on the Installation Groups section, select the installation group from the list and then click accept.
You can assign multiple universal codes to the same installation group at a time by selecting multiple universal users using control and/or shift.

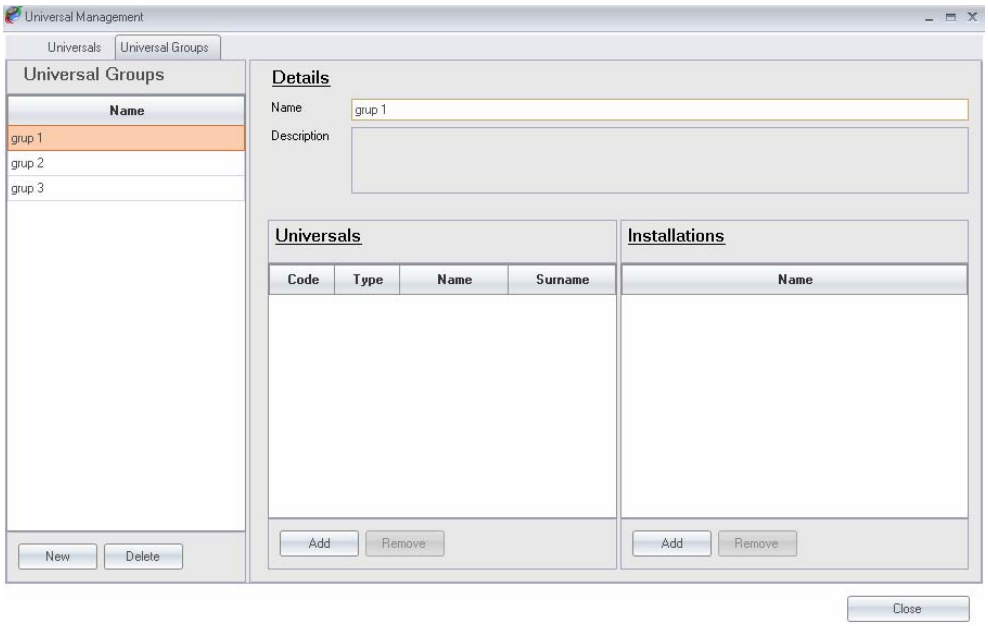
To assign an universal group to a universal code, click on add, on the Universal Group section, select the installation group from the list and then click accept.
You can assign multiple universal users to the same universal group at a time by selecting multiple universal users using control or/and shift.

4.6.1.4 Universal groups

To create a universal group click on universal groups on the top of the page. To enter a new universal group, click on new. Enter its name and complete the information fields (optional although highly recommended) and click accept.

To add universal codes to an universal groups, click add on the universal codes section and select all the universal codes do you want to assign to the universal group.

To add installation to an universal group, click add on the installations section and select all the installations do you want to assign to the universal group.



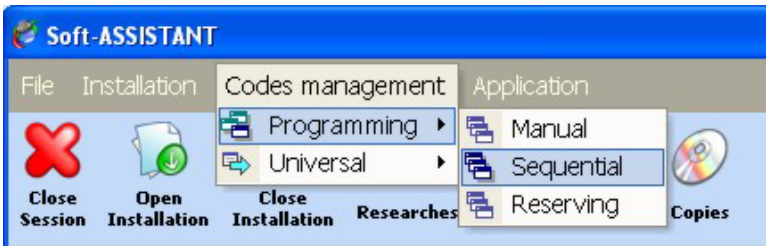
4.6.2 Code registration / cancellation

4.6.2.1 Registration

This allows for codes to be registered manually or sequentially on an installation or for reserve codes to be generated.
Registrations can be made from the Group tree or from the Code Management, Registrations option from the menu bar.

From the User group tree

From the menu bar

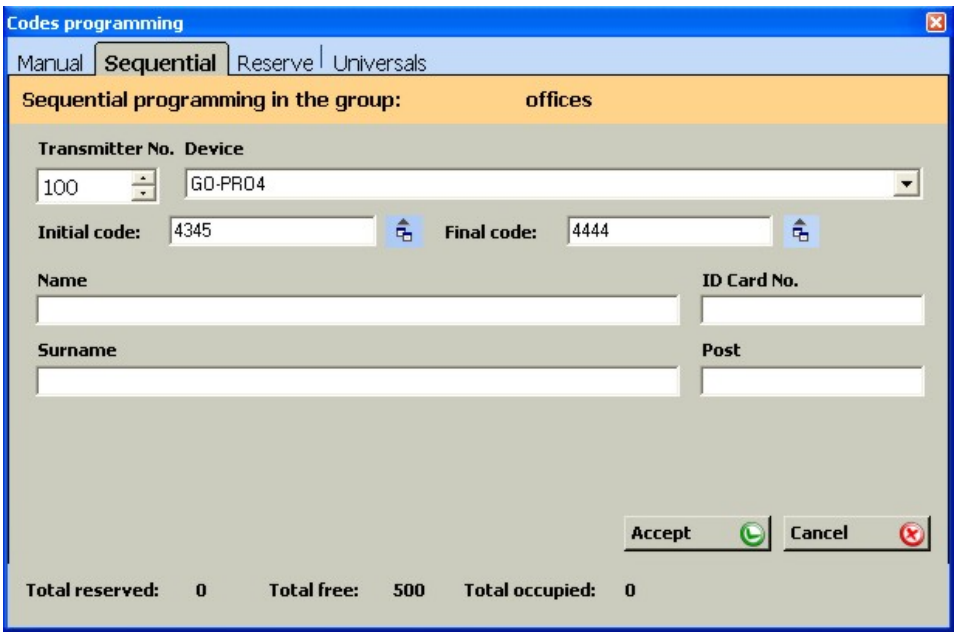


a) Manual Registration

Select the device model to be registered and enter its code using the keypad or click on the field with the right-hand button of the mouse to enter the code by radio. Complete the user information fields (optional).
On accepting, the programme lists the codes registered.

b) Sequential Registration

Select the device model to be registered, enter the initial code and the amount of devices required or the end code using the keypad. To enter the code by radio, click on the button on the right of the field. Complete the user information fields (optional).
On accepting, the programme lists the codes registered.



c) Reserves

Select the device model to be registered and enter the amount of devices required.
On accepting, the programme lists the codes registered.

d) Universal

A universal code can be registered from the Group tree or from the Code Management, Universal, Registrations option from the menu bar. If the registration is made from the menu bar, no installation has to be open, although the installation to which the codes and group are to be registered must be selected.

Select the code to register. On accepting, the programme lists the codes registered.

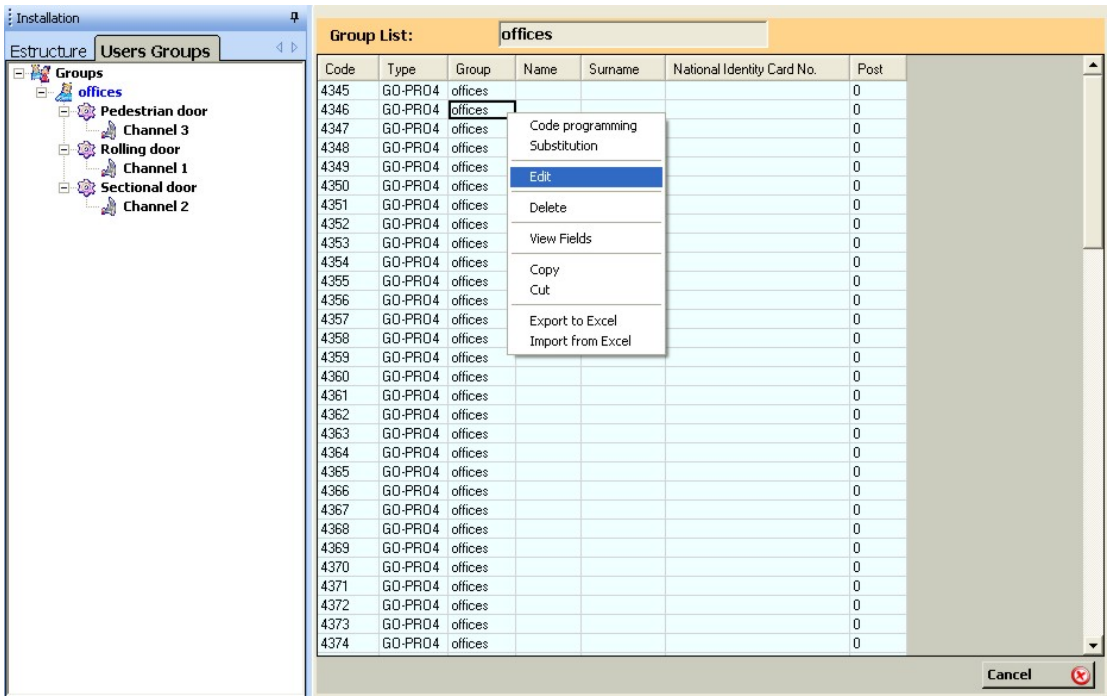
4.6.2.2 Cancellation

This allows for codes to be deleted individually or by group.

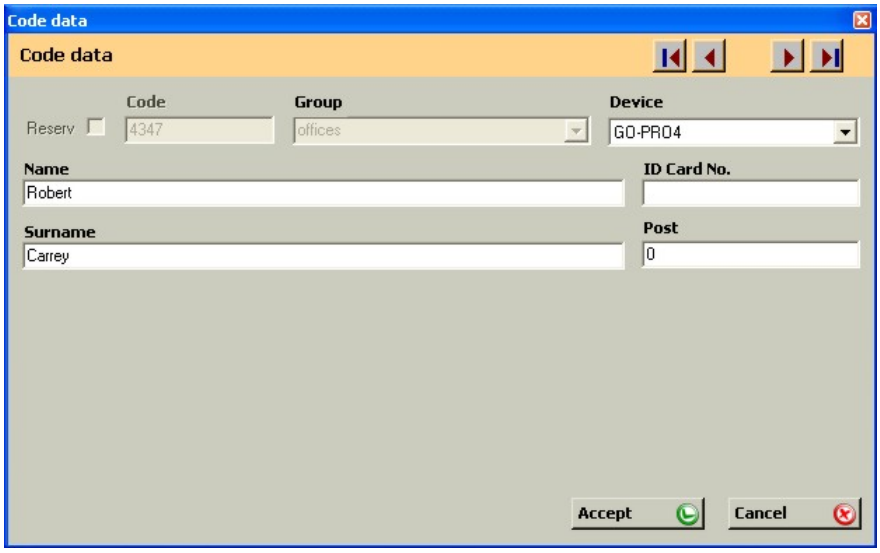
From the group list screen, click on the code or codes to be deleted using the right-hand button of the mouse and a pop-up menu will appear. Click on Delete.

4.6.3 Configuring / Editing user data

Click on any box in the row of the list to be edited with the right-hand button of the mouse. A pop-up menu will appear with several options available.

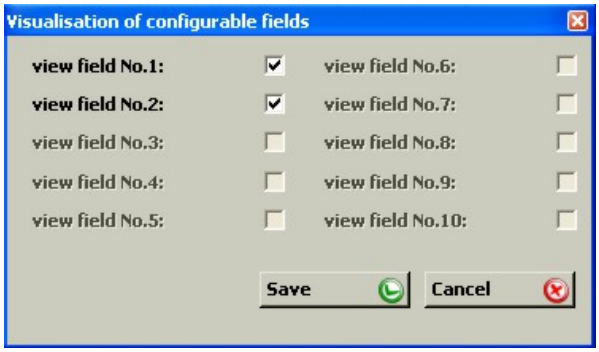


a) ***Edit:*** this allows for a first name, surname, ID number and place number of the device user and the visible configurable fields to be added or modified.



The arrows in the upper right section enable the user to move around the group users list.

b) ***Field display***: this allows for the fields to be displayed in the group list to be selected. Select the fields and click on Save. The fields selected will appear to the right of the group list.
Only the fields configured as visible will be displayed (see Section 4.2.2 Configurable Fields).



c) ***Copy*** / ***Cut***: this allows for one or several lines of the code list to be copied and pasted to another installation. It also allows for lines from the code list to be cut and pasted to another installation or another group.

d) ***Export to Excel*** / ***Import from Excel:*** This allows for the user list of a group to be exported to edit its data in Excel or import it.

4.6.4 Save / Record installations

a) ***Save to database***: this saves all the installation in the programme database.

b) ***Save to device***: this saves the memory of each device individually by selecting it.

4.7 REPLACEMENTS, RESERVES

4.7.1 Replacement

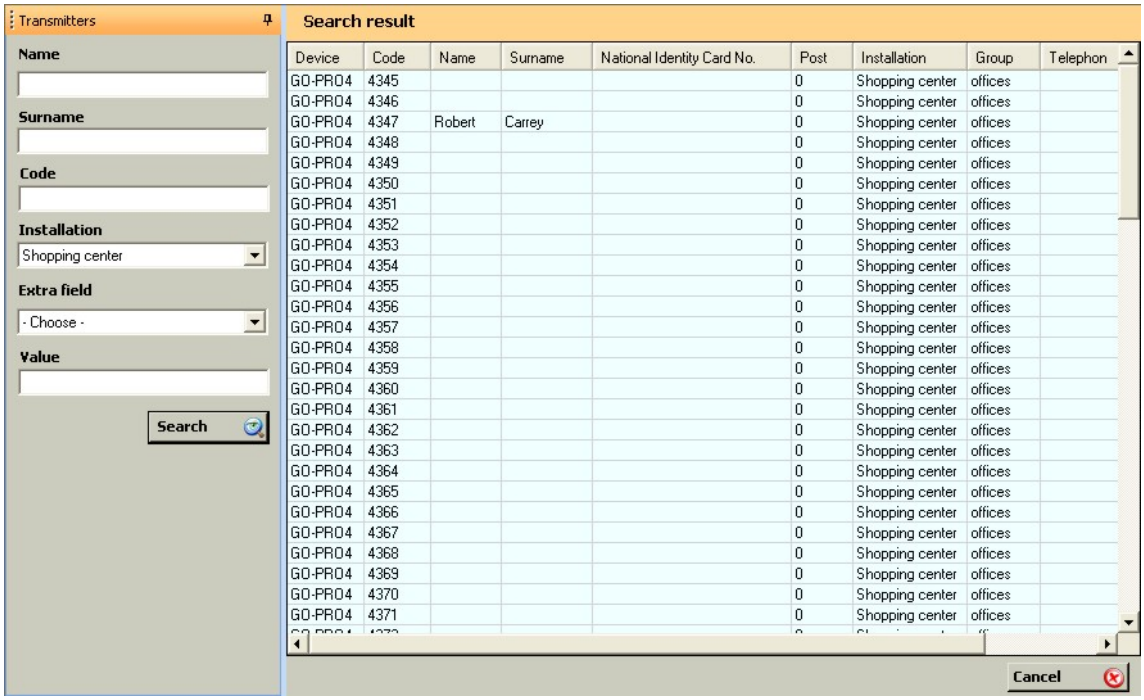
Should a device be lost or stolen, it can be deleted and replaced through the programme.
Select the code to be replaced from the group list using the right-hand button of the mouse and click on Replacement. The programme waits for radio reception of the new code to be inserted into the database, which will be saved to the receiver/station when the user reaches the installation.

4.7.2 Allocating reserved position

To submit devices with reserve codes, select the reserve code from the group list using the right-hand button of the mouse and click on Save code. The programme waits for radio reception of the new code to be inserted into the database, which will be saved to the receiver/station when the user reaches the installation.

4.8 SEARCHES

This allows for searches to be made by surname, code, installation or other fields (visible configurable fields)



By clicking the right-hand mouse button on a list user, a pop-up menu will appear. By selecting Edit, the installation, group and user file are opened. The user may edit data, carry out substitutions, etc. directly.

4.9 LISTS

4.9.1 Group details

A list of all the codes of a group or several groups. The installation must be open for it to be displayed.

4.9.2 Equipment memory

List of the configuration and codes for a receiver. Only the configuration, only the codes or everything at the same time can be displayed.

The lists will be displayed on the screen as a preliminary view before printing. They can be printed directly or exported to different formats (rtf, pdf, html, xls, tif, text).

4.9.3 Unit details

List of all the units in an installation displaying unit type, number and name of assigned relays. In order to view it the user must have an installation open.

4.10 ADMINISTRATOR SOFT ASSISTANT

On running the application, the programme will request a login and password. The login is “softadmin” and the password is “assistant” by default.

User:	softadmin
Password:	assistant

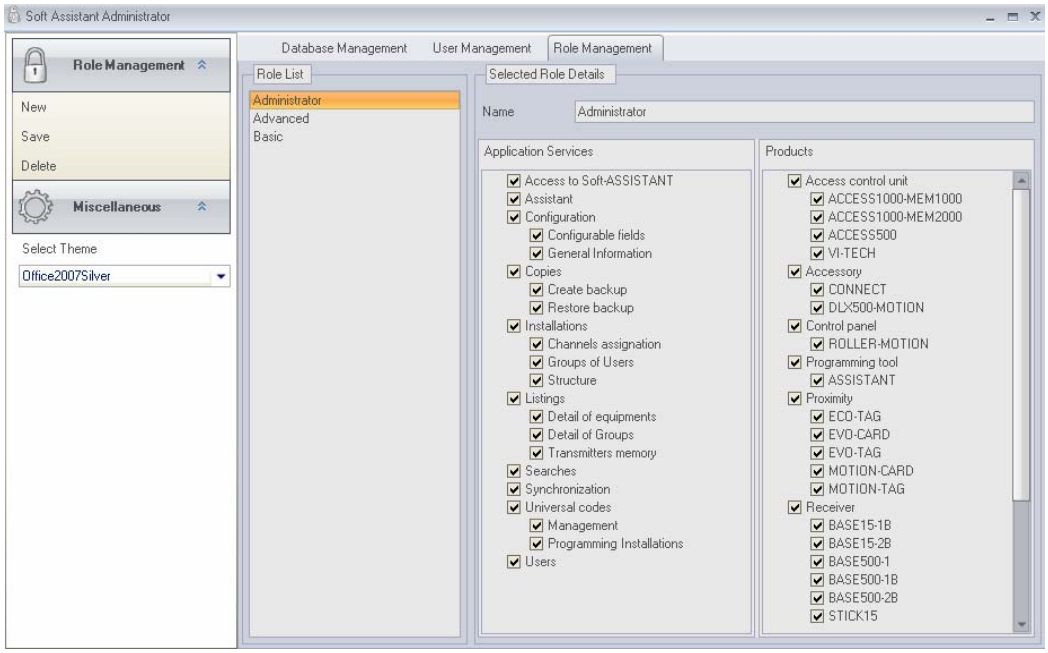
Note: Before executing Soft-Assistant Administrator, you must close the Sodt-Asssitant program.

4.10.1 Roles

The management of roles is in the tab Role Management. In role list you can view all established roles (Manager, Advanced and Basic roles are created by default). You can change the application services and products that access the different roles by marking or unmarking the different options.

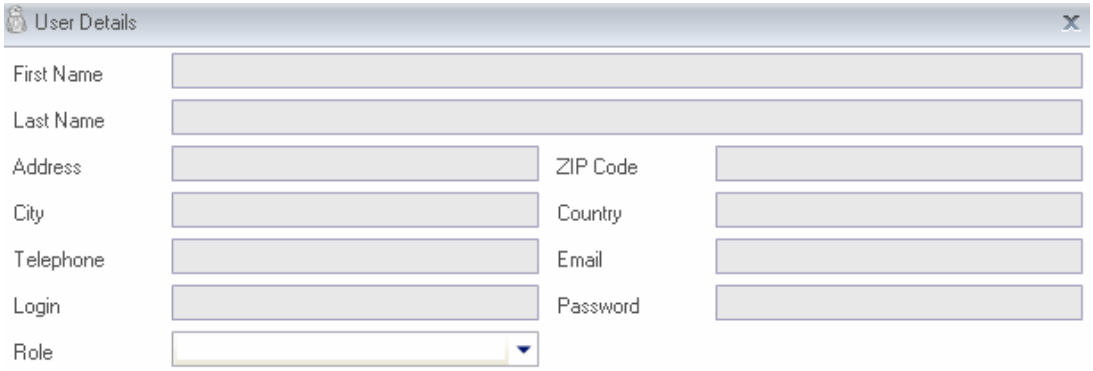
To create a new role, click the New button. Type a name for the new role and mark the application services and products that you want the role has access. To finish the creation of the new role, click the save button.

To delete a role, mark the role to remove and press the delete button.



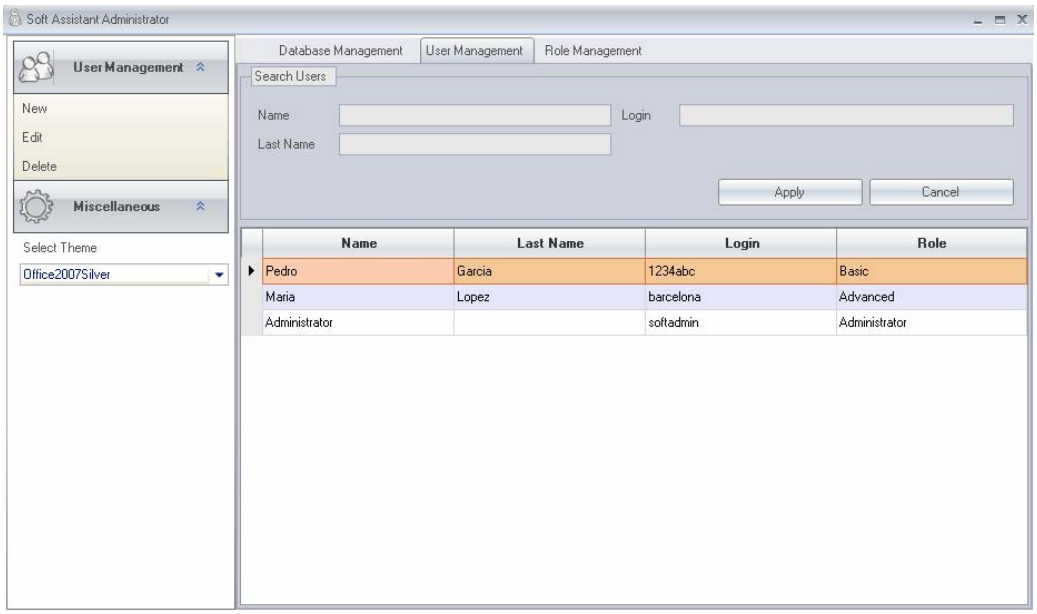
4.10.2 Users

It allows multiple users to access the application with configurable permissions for each user.



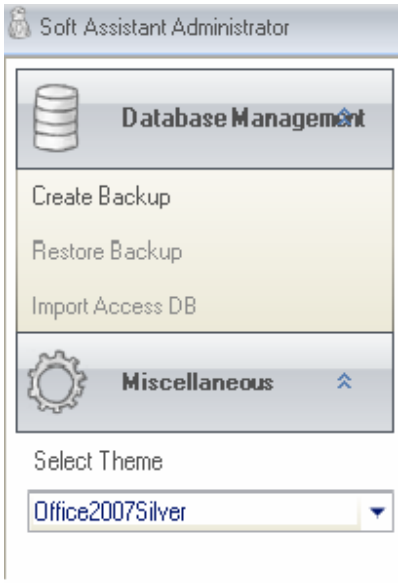
To enter a new user, click “New”, on the Rol Management window. The User Details screen will display all the fields to fill gaps. You must enter a user name, password and other personal data you want, and you must select a Role from the list.

If what you want is to find a user, you can search by name, last name or user group. A list below the search will show all users found by the search. If you leave search fields blank, click the Search button to display all users.

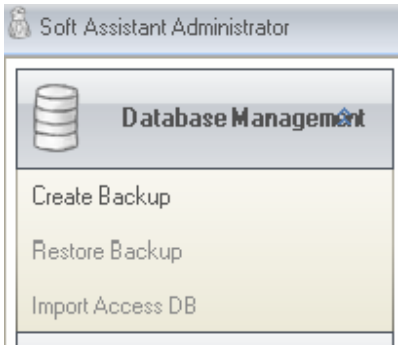


4.10.3 Import Access Data Base

Allows you to import Access databases generated with version 3.5.0 or higher of the Soft-Assistant.



4.10.4 Backups



4.10.4.1 Save

Copy of the database (to a file): Once an installation has been created, it is wise to make a back-up copy of the database.

4.10.4.2 Restore

Copy of the database (from a file): The restore procedure can be of great use in the event of accidental loss of the database. This procedure replaces the programme database. The modifications made after the last back-up copy will be lost.

4.10.4.3 Scheduling backups

It allows you to schedule backups to run every time you want.

The programming must be done through a system task manager running the following command:

SoftAssistant. Administrator –b

The backup is saved in the backup directory program.

If you want to specify a different filename to save a copy, the command to execute should be the following:

SoftAssistant. Administrator –b C:\FolderName\FileName.bak

Note: Import or restore databases cannot be performed on mobile stations.