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Escan Technologies Corporation

Exeba<sup>®</sup> - ACON<sup>™</sup>

User Guide

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ESCAN TECHNOLOGIES CORPORATION

# Exeba<sup>®</sup> - ACON<sup>™</sup> User Guide

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**Serial Number:**

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## Introduction

**E**xeba- ACON™ is a “real time” access control system designed for clubs, gyms and other organizations that deal with members. It is designed to run with specific hardware offered by E-Scan Technologies.

In this chapter you will learn,

- ▶ about the application’s main features
- ▶ how to install the software
- ▶ how to unlock the software

## Features

The main features of Exeba<sup>®</sup> - ACON<sup>™</sup> are as follows:

- Creates and keeps track of member data, member groups, group rules, schedules, messages...
- Allows for the use of an alternate member ID
- Import and export the member data
- Import function allows field mapping
- Allows customization of company's parameters: company name, workweek definition, schedule's rules...
- Limits user access to the software through a password
- Allows the user to select different ports and port settings, adjust delays and time-out according to the hardware requirements
- Interfaces directly with Exeba software
- If you are using the application Exeba<sup>®</sup> E-swipe or Exeba<sup>®</sup> -ATS, the user will be able to receive and send data between the two applications seamlessly.

## Installing Exeba<sup>®</sup>- ACON<sup>™</sup>

The installation program allows you to install Exeba<sup>®</sup>-ACON<sup>™</sup> from a CD. Before you begin, make sure you have the serial number that appears on the registration card or this manual. Then verify that your computer meets the requirements listed below.

### System Requirements

Exeba<sup>®</sup> - ACON<sup>™</sup> has the following system requirements:

- An IBM PC or compatible computer.
- Microsoft Windows Me, 2000, NT, or XP.
- A Pentium processor.
- Approximately 13 MB of available disk space.

## Installation

- Start Microsoft Windows
- Close other applications
- Insert the Exeba® - ACON™ CD-ROM into your CD-ROM drive.
- If the installation program did not start automatically, choose Run from the Start menu.
- When the Run dialog box appears, type x:\setup (substitute the letter of your CD-ROM for x) and press Enter.
- Follow the on-screen instructions.

## Unlocking Software

You need to unlock the software if the following conditions apply:

- After installing the software.
- When installing the software on a different computer.

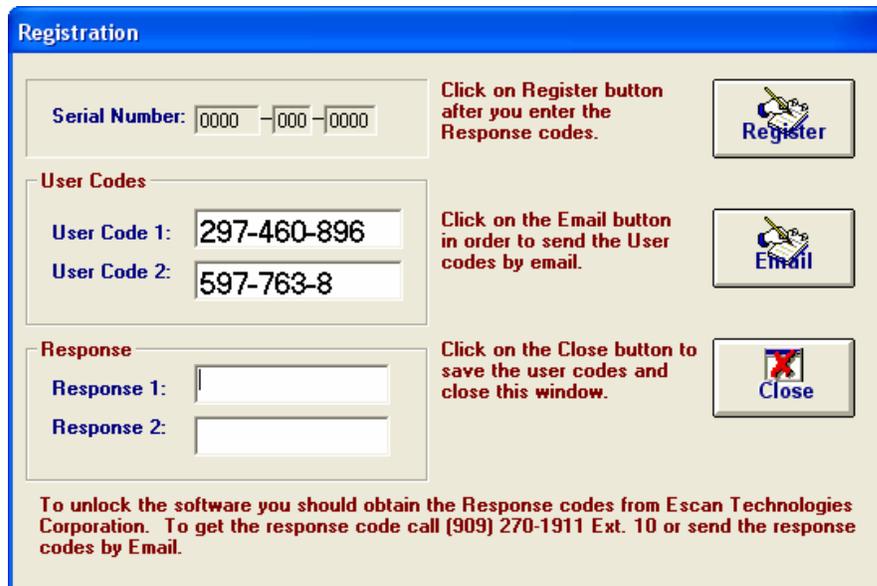
When you start *Exeba- ACON™*, the window below will appear:



This window enables you to access the software, access ACON™ clock, unlock the software, and link to the Exeba web site.

To unlock the software, follow the steps below:

Click on the **Unlock** button. The following window will appear:



The screenshot shows a 'Registration' window with a blue title bar. It contains three main sections: 'Serial Number' with a text box containing '0000-000-0000'; 'User Codes' with two text boxes containing '297-460-896' and '597-763-8'; and 'Response' with two empty text boxes. To the right of each section is a button: 'Register', 'Email', and 'Close'. Red text instructions are placed next to each button. At the bottom, a red text block provides contact information for Escan Technologies Corporation.

**Registration**

Serial Number: 0000-000-0000

Click on Register button after you enter the Response codes.

**Register**

**User Codes**

User Code 1: 297-460-896

User Code 2: 597-763-8

Click on the Email button in order to send the User codes by email.

**Email**

**Response**

Response 1:

Response 2:

Click on the Close button to save the user codes and close this window.

**Close**

To unlock the software you should obtain the Response codes from Escan Technologies Corporation. To get the response code call (909) 270-1911 Ext. 10 or send the response codes by Email.

Then unlock the software using one of two methods:

1) Register by ***E-mail***

If your computer is connected to the internet, click on the **Email** button it will open our unlocking web page where you must fill out as much information as you can. Remember to checkmark the hardware you purchased with this software. After you have entered all of your information, click Submit. The response codes will then be emailed to you at the email address you provided.

Note: Please copy and paste your User Code 1 and User Code 2 into the appropriate field. Then click on the **Close** button.

2) Register by ***Phone***:

Call the Escan support line at (909) 270-1911 **Ext 10**. Please provide the support representative with the following information: User Code 1, User Code2 and the hardware that was purchased. The representative will then give you two codes: Response1 and Response 2. Enter them in the designated boxes. After you have done so, click on the **Register** button.

Note: It is necessary for you to be in front of your computer, and have the software running when you call to register.

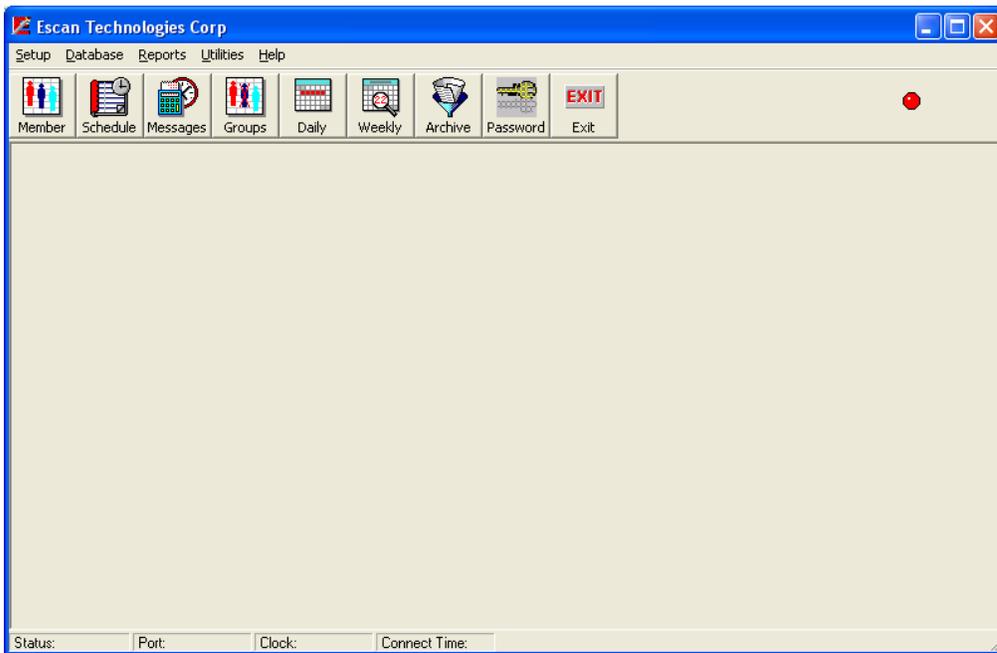


## Getting Started

You are now ready to use Exeba<sup>®</sup> - ACON<sup>™</sup>. In this chapter you will be introduced to the main window that will help you get started.

### Main Window

From this window, you can access all of the application's functions.



**1- Main Menu:** This menu has several selections. It is located on top of the main window. From these menus, you can access all the program's applications. The following section describes each menu in a separate chapter.

**2- Button Bar:** Located under the main menu which contains buttons that you can use to easily access some of the frequently used commands in *Exeba- ACON™*

**3- Status Bar:** Located at the bottom of the main window, displays messages regarding the communication status and the current settings in *Exeba- ACON™*

It is divided as follows:

*Status* – displays any error message returned from the port.

*Port Settings* – displays the current port settings of the selected clock.

*Clock* – displays the current settings for the selected clock.

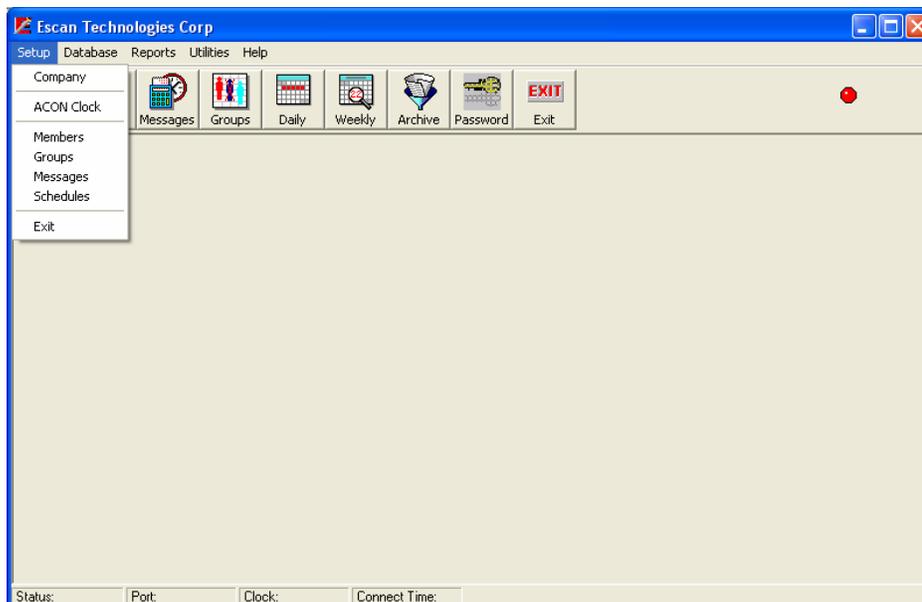
*Connection Time* – displays the duration of time the port has been opened.

## Setup Menu

The Setup menu allows you set the company data, the communication settings, add, remove and update members, groups, messages and schedules.

In this chapter you will learn how to:

- ▶ Define the company settings.
- ▶ Define the communication settings.
- ▶ Add, remove and update member.
- ▶ Add, remove and update group / group rule.
- ▶ Add, remove and update message for each member.
- ▶ Add, remove and update schedule.



## Company Setup

Once selected the following window will appear:

The screenshot shows a 'Company Setup' dialog box with the following fields and options:

- Company:** Company Name: Escan Technologies Corp
- Workweek Definition:** Workweek Start Day: Monday; Day Start Time: 01:00 AM
- Member Renewal Option:** Warning Days: 7; Automatic Renewal: No (selected)
- Schedule:** Grace Period: 15

*Company Name* - Enter the name you want to appear in the reports. A maximum of 60 characters will fit in this field

*Workweek Start Day* - Choose the first day for the company's workweek. The default is Monday.

*Day Start Time* - Enter the time the workday starts (hh:mm AM/PM). The workday is any consecutive 24-hour period beginning at the same time on each calendar day. Although Exeba- ACON™ allows you to change this field anytime, you should customize it before the members start clocking in and out, thereafter, leave it unchanged.

*Warning Days* - The number of days when a message pops up to warn the member that his membership is about to expire.

*Automatic Renewal* – Select “yes” if you want the membership for each member to be renewed automatically once it is expired. If you do not want automatic renewal, select “no”.

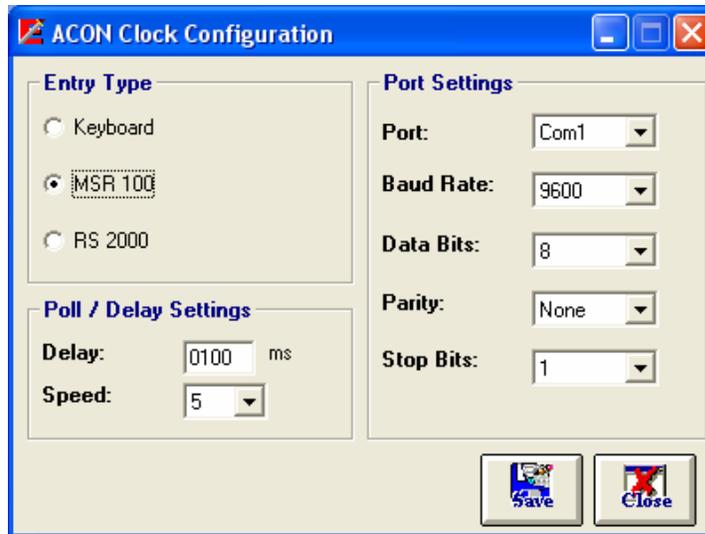
*Grace Period* - The number of minutes you allow a member to clock in or out before and after the scheduled shift.

**Save:** After updating information in this window, click on this button to save the changes permanently.

**Close:** To exit this window

## ACON™ Clock

This menu is used to select the entry type and to set the communication parameters.



*Entry Type* - Select either a keyboard or a serial communication reader (RS 2000 or MSR 100).

If one of the serial readers, MSR100 or RS 2000, is selected, the *Port Settings* and *Poll / Delay Settings* may need to be changed.

**Save:** After selecting the entry type and the communication settings, click on this button to save the settings permanently.

**Close:** To close the window

## Member Setup

This menu is used to add a new member, remove an old member and update member personal data. This information will be used to when viewing a report or searching for a member.

Once selected the following window will appear:

***Add New Member:***

**New:** used to clear the window

For each member, you can setup the following information.

*Member ID #* - The member's identification number for Exeba- ACON™. Enter up to 16 alphanumeric characters. The Member ID# should not contain any space characters.

*Lost Card ID #* - The member's identification number for Exeba- ACON™ Clock. By default it has the same value as Member ID #. The Lost Card ID# is used **ONLY** when a member loses his card and a new card needs to be issued. It is required to change this field to keep the member ID # intact, to prevent duplicate records and to prevent from losing previous member information.

Enter up to 16 alphanumeric characters. The Lost Card ID# should not contain any space characters.

(If the ATS clock is used for clocking members in and out, then the number you enter for this field has to be a fixed 6 digit or a fixed 12 digit depending on how you defined it in the clock parameters setup.)

*First Name* - Member's first name, up to 15 characters

*Middle Name* - Member's middle name, up to 15 characters

*Last Name* – Member's last name, up to 15 characters

*SSN* - Member's social security #, 10 characters

*Birthday* - Member's birthday

*Member Since* – Date of being member

*Active Date* – Today's date

*Active Member/Inactive Member* – Allows you to toggle between active and inactive members. Select *Active Member* for current members. *Inactive Member* for expired membership. For example, if you select the Active option, you will be able to view the active members only.

*Address* – Member's Address (Street, City, State, Zip and Phone #).

*Groups* - Member's Group(s). Each member can be a part of one or more groups. Select the group(s) from *Available Groups*. To deselect a group click on the specified group from the *Group(s)* list.

*Message* – If you want to display a message to the Members when they scan their card, type it in this field. You can view all the messages related to this specific member by scrolling down the list of messages.

*Notes* - You may enter useful employee notes, up to 255 characters.

***Save a member record:***

After entering all the member information, click on the **Save** button to add this member to the database.

***Update a Member's Record:***

The member information can be changed anytime, but to save the changes permanently click on the **Update** button.

***Alternate ID:***

When a member card is lost or stolen and you need to issue a new card, click on **Card ID** button and **Card ID#** box will appear. Enter the new ID # and then click on **Update** button to save the changes.

***Navigating:***

You can navigate through the database records using the following buttons:

*First:* To move to the first record.

*Previous:* To view to the previous record.

*Next:* To view the next record.

*Last:* To move to the last record.

***Search for a member:***

This button **Browse** is used to search for a member. A search can be done by member ID#, Lost Card ID# or the SSN. After clicking on this button, the following list will appear:



### ***Delete a member record:***

If you want to delete an existing member record, enter the member ID# in the member ID# text box, and click on the **Delete** button. When the delete confirmation message pops up, double check to make sure you intended to delete that member. Click on the "Yes" button to confirm deletion. NOTE: Selecting YES will delete all the member attendance information on that member.

### ***View Member Report***

You may view a detailed report for a specific member by clicking on the **View** button.

### **Print a Member Report**

To send the report directly to the printer, click on the **Print** button.

### **Exit the Member Setup Window**

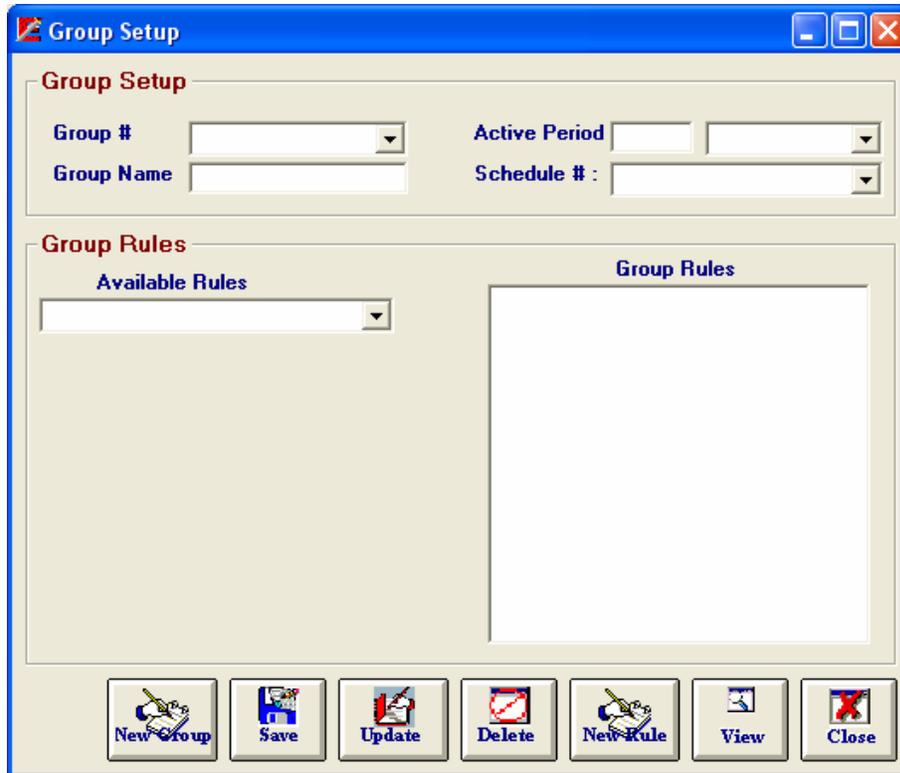
After entering all the member's information and /or any updating, click on the **Close** button to exit the window.

## **Group Setup**

A group is a certain number of members having one or more rules in common. Each member can belong to one or more group.

The Group setup window allows you to create, remove and update group(s). From this window you can access the "Rule" setup window.

Once this menu is selected the following window will appear:



### ***Add New Group:***

To add a new group, fill in the following information and Save by clicking on **Save** button.

*Group #* - Must be 3 digits.

*Group Name* – Name of the group, alphanumeric, up to 255 characters

*Active Period* – The period of time for this group to be active

*Schedule #* - Each group has a schedule. It is used to specify during which hours a member of this group can clock in and out. If the member is permitted to clock in and out anytime, you can assign the schedule # “000”.

*Group Rules* – Each group has specific rules. To select a rule you can use “Available rules “.

To remove a rule assigned to the group, double click on it in the group rules list.

### ***Update a group:***

Click on the **Update** button to save any changes made.

### ***Delete a group:***

To delete a specific group, enter its number and then click on the **Delete** button. NOTE: You cannot delete a group if it is assigned to a member. You need to delete the member record first or unassigned it and then delete the group.

### ***View Groups:***

Select the **View** button, to view a report of all the available groups you created.

## Rules Setup

Each Group has one or more rules. The rules are used to set restrictions for each group of members to follow. The Rule will be displayed to the member when he or she clocks in /out.

You can access the rules window from the group window using the button **New Rule**.



### Buttons Function:

*New* – To clear the window

*Update* - To update a current record

*Save* – To save a new record

*Delete* – To delete the current rule

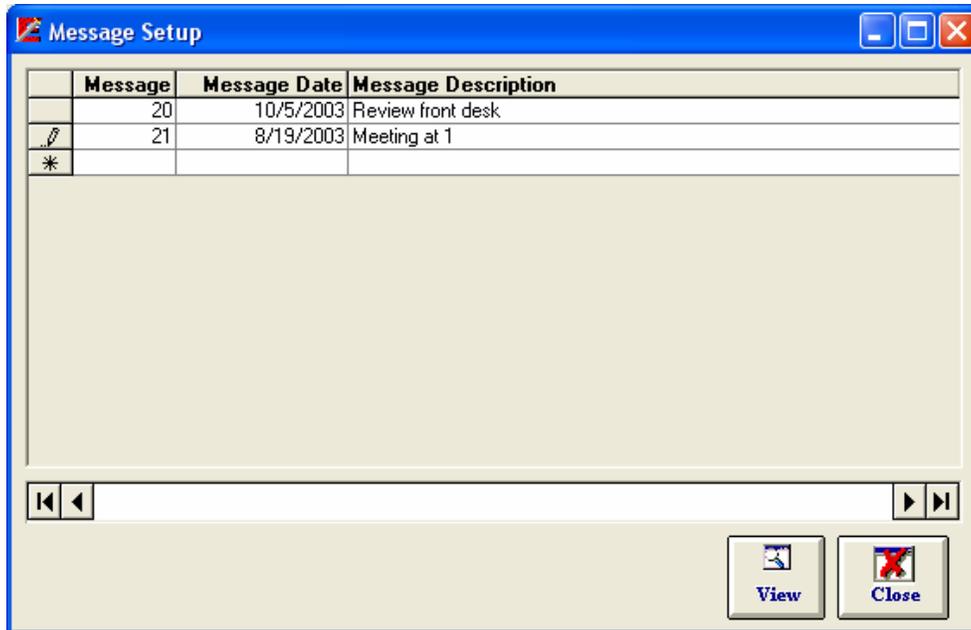
*View* – To view a list of all the available rules

*Close* - To exit the window

## Message Setup

The Message Setup window allows you to create a message and assigned it to a member. The message will be displayed to the member when he or she clocks in /out.

From the Setup menu, select Messages, and the following window will appear:



### ***Add a new Message:***

Fill in the following information and click on the **Enter** key to add a new message.

*Message #* - An auto number is generated by the software

*Message Description* - The message text

*Message Date* – The date of the message

### ***Update Message:***

From the Messages list, change the information you want and then click on **Enter** key to update the changes permanently.

### ***Delete Message:***

You can delete a message by selecting it from the message list and then click on the **Delete** button. NOTE: You cannot delete a message if it is assigned to a member. You need to delete the member record first or unassigned it and then delete the message.

### ***View List of Messages:***

Click on the **View** Button, to view a list of all available messages

### ***Exit the Window:***

Click on the **Close** button, to exit this window.

## **Schedule Setup**

The schedule is used to define the available hours for each member group. . If the members of a certain group are permitted to clock in and out anytime, assign the schedule# "000" in the Group Setup form.

Each group has a schedule and each member of the group has to follow the specific schedule for this group.

Once this menu is selected, the following window will appear:

Day		Start Time	End Time
Sunday	<input checked="" type="checkbox"/>	3:35:00 PM	5:35:00 PM
Monday	<input checked="" type="checkbox"/>	3:35:00 PM	5:35:00 PM
Tuesday	<input checked="" type="checkbox"/>	3:35:00 PM	5:35:00 PM
Wednesday	<input checked="" type="checkbox"/>	3:35:00 PM	5:35:00 PM
Thursday	<input checked="" type="checkbox"/>	3:35:00 PM	5:35:00 PM
Friday	<input type="checkbox"/>	9:45:56 AM	9:45:56 AM
Saturday	<input type="checkbox"/>	9:45:56 AM	9:45:56 AM

***Create Schedule:***

New: To clear the window

Enter a 3 digits number for the Schedule # and schedule description and click on the **Save** button.

***Update Schedule:***

To update an existing schedule, select its number from the drop-down menu, make the necessary changes and click on the **Update** button.

***View Schedule List:***

You may view a list of the schedules by clicking the **View** button.

**Exit the window:**

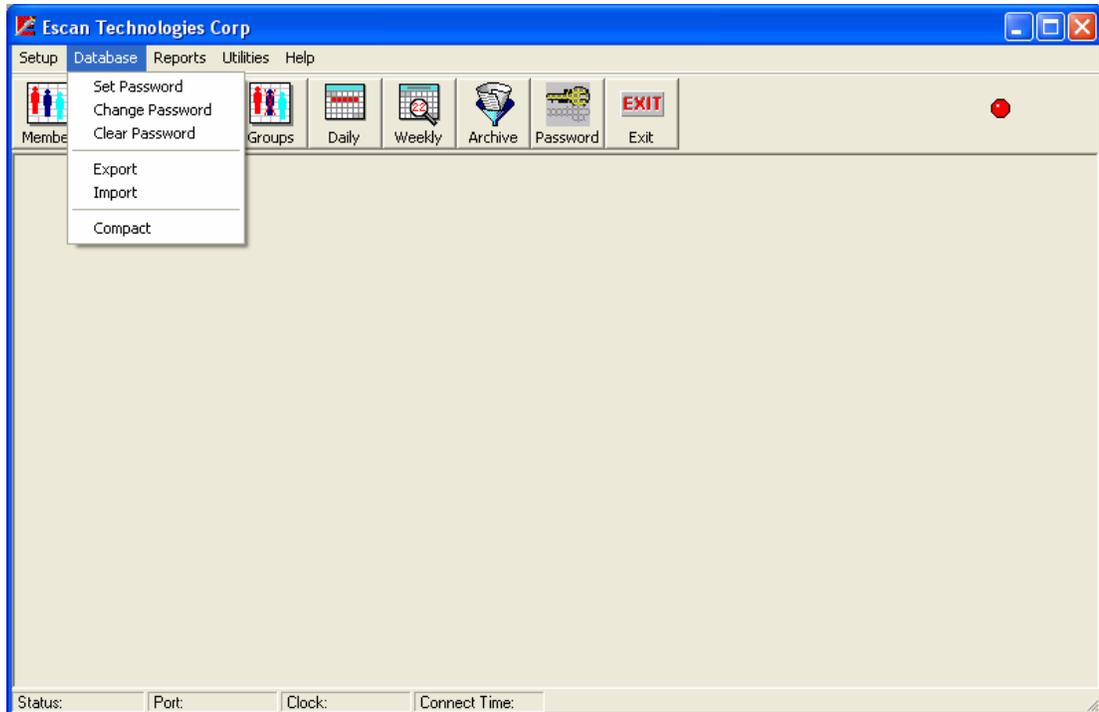
When you finish with the Schedule Setup Form, click on the **Close** button.

## **Database Menu**

**T**his chapter describes in detail the menu commands related to the database.

In this chapter you will learn how to:

- ▶ Set a password
- ▶ Change a password
- ▶ Clear password
- ▶ Export data
- ▶ Import data



## Set Password Menu:

This menu is used for security access. Once the password is set, the user will not be able to access the software unless the correct password is entered.



Select a password, confirm it and then click on the **Set** button to save it.

## Change Password Menu

Once you set a password, you can change it using this menu. NOTE: You must remember your old password in order to set a new one.



Enter your current password, select a new password, confirm it and then click on the **OK** button to save the changes.

## Clear Password Menu

You can also omit the security access to the software by clearing the password.



Enter the current password and then click on the **Clear** button to omit the password.

## Export Data Menu

This menu is used to export data from the database to a comma text delimited file. From the following window, select the data you want to export.



*Members Attendance Data* – Select this option to export the attendance data (clock in /out)

*Personal Data* – Select this option if you want to export the members’ personal data like (Name, Address, Group #,...)

When you select this option the following window will appear:



The fields will be exported in the order that they appear in the *Fields to export in order* list.

There are 3 export options: you can select to export all available members, current members with valid membership or members with expired membership.

After selecting the fields to export, click on **Export** button to start exporting a *Save as* standard window will appear. This window allows you to select the drive, folder and the name of the file to export the data to. After selecting the file, the fields in the list box *Fields to export in order* will be written to the specified text file.

*Schedule list* –Select this option to export a list of all available schedules.

## Import Data Menu

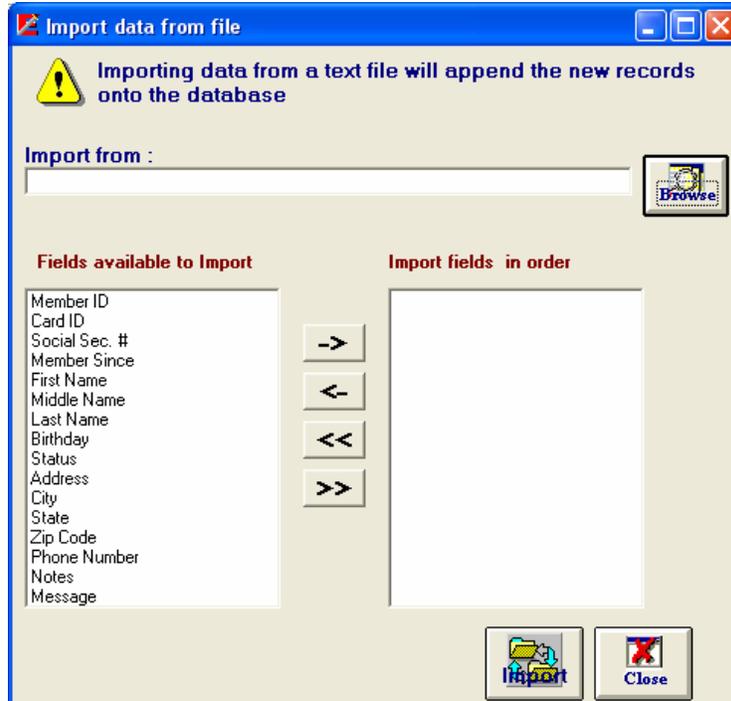
This command allows you to import records from a text delimited file to a database.

From the following window select the data you want to import.



Member Personal Data – To import personal data like (Name, SSN, Member ID #,...)

Select this option and click on the **Import** button to access the following window.



The number of fields selected for importing should be less than or equal to the number of fields in each record in the imported file. If the number of fields in

each record, in the imported file, is greater than 16 (the maximum number of fields in the database), the program will import only 16 fields from each record.

*Import from* - Enter the drive and folder where the file to be imported is located.

*Fields Available to Import* - This list displays all the fields that can be imported.

*Import Fields in order* - The list above displays the selected fields in import order.

*Browse* - Use this button to locate the file to be imported into the active database.

*Import* - Use this button to start importing records into the active database.

*Close* - Use this button to close the window and return to the main menu.

## **Compact Menu**

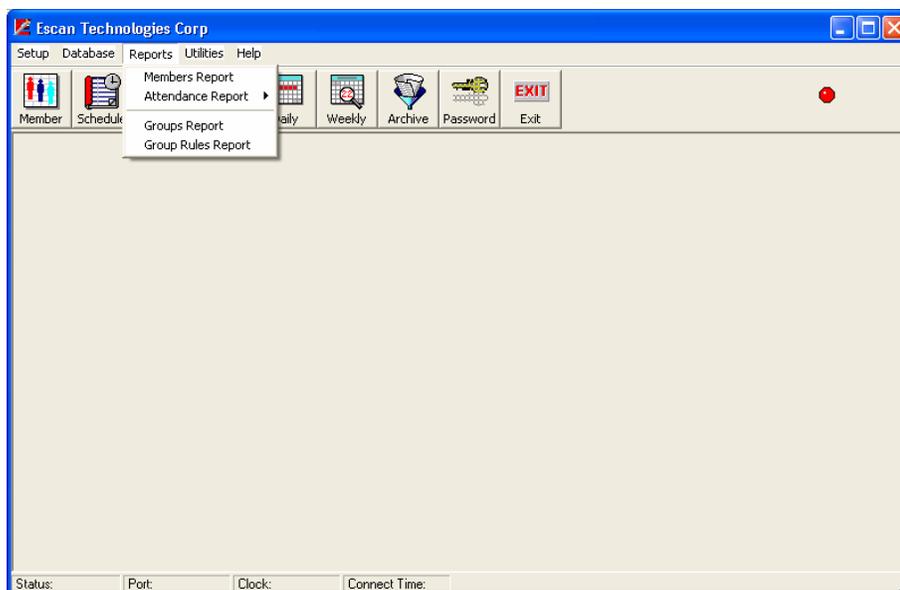
The database may grow substantially over time according to the amount of information you add or delete. The Compact Database utility will compact your database and make it more manageable. You may want to run this utility before you make copies.

## Reports Menu

This chapter describe the most common reports.

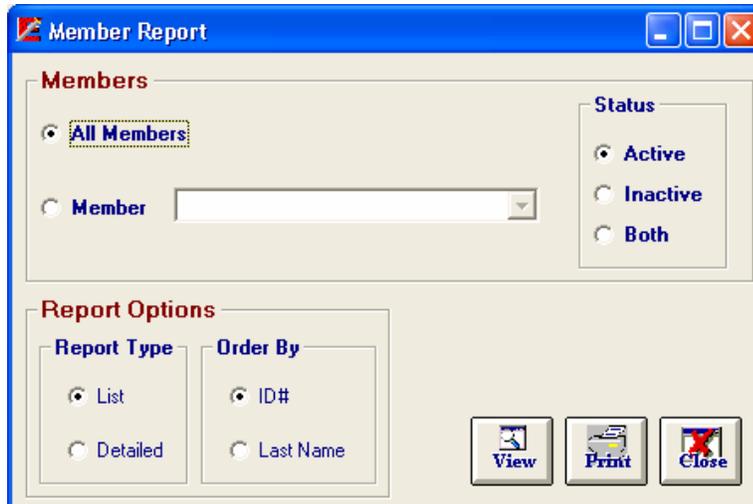
It describes:

- ▶ Members Report
- ▶ Attendance Report (Daily, Weekly and Summary)
- ▶ Group Report
- ▶ Group Rules Report



## Members Report Menu

This menu provides a detailed list of members.



The screenshot shows a window titled "Member Report" with a blue title bar. Inside, there are two main sections: "Members" and "Report Options".

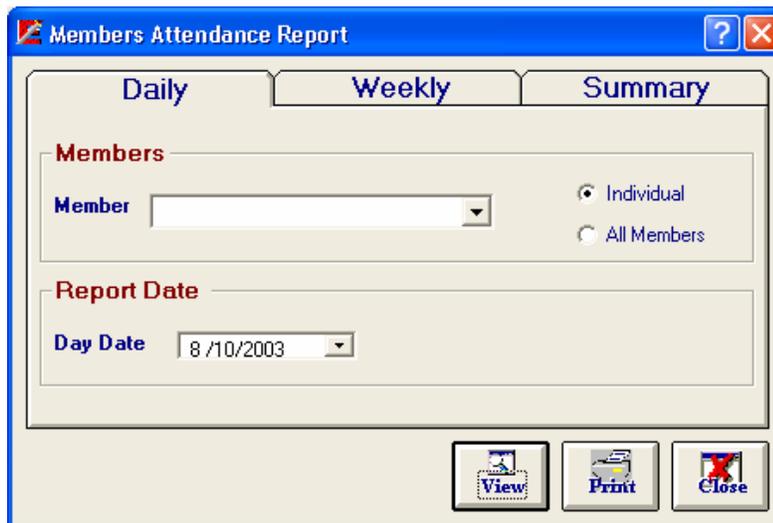
- Members:** Contains a radio button for "All Members" (which is selected), a "Member" label, and a drop-down menu. To the right is a "Status" section with radio buttons for "Active" (selected), "Inactive", and "Both".
- Report Options:** Contains two sub-sections: "Report Type" with radio buttons for "List" (selected) and "Detailed"; and "Order By" with radio buttons for "ID#" (selected) and "Last Name".

At the bottom right of the window are three buttons: "View", "Print", and "Close".

You can select All Members to view all the existing members or you can select a specific member from the drop-down menu.

## Attendance Report Menu

To view a report of member(s) attendance, select this menu. The following window will appear:



The screenshot shows a window titled "Members Attendance Report" with a blue title bar. At the top, there are three tabs: "Daily", "Weekly", and "Summary".

- Members:** Contains a "Member" label and a drop-down menu. To the right are radio buttons for "Individual" (selected) and "All Members".
- Report Date:** Contains a "Day Date" label and a drop-down menu showing "8/10/2003".

At the bottom right of the window are three buttons: "View", "Print", and "Close".

After selecting member(s) and the day, week or a period of time, click on view to view the report or to send it directly to the printer.

## **Group Report Menu**

This menu is used to view a report of all existing groups.

This report can be viewed from the setup “Group” window.

## **Group Rules Report Menu**

This menu provides a list of all the rules in the software.

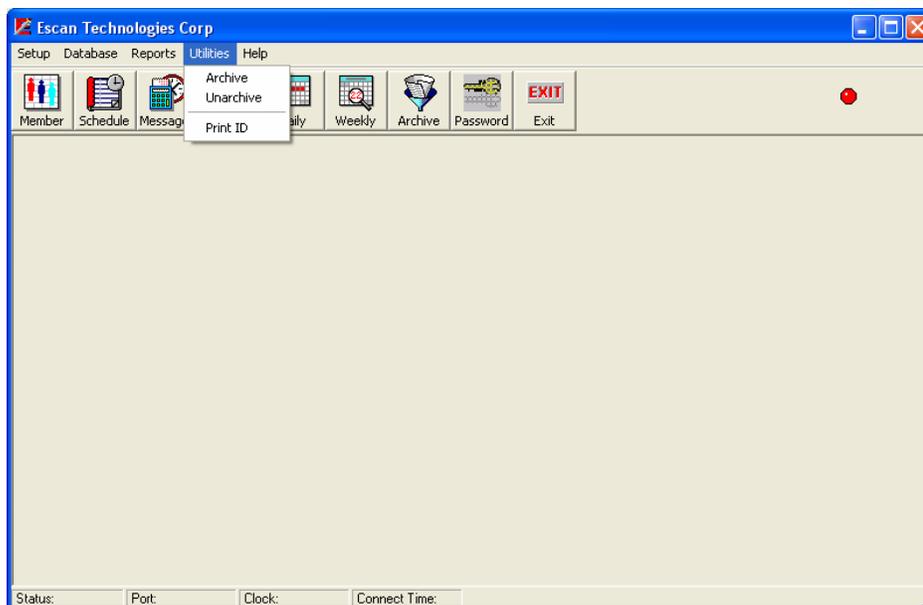
Also you can access this report from the window “Group Rules Setup”.

## Utility Menu

**T**his menu allows you to access some features provided by the software.

In this chapter you will learn how to:

- ▶ Archive
- ▶ Unarchive
- ▶ Print Member ID



## Archive Menu

This utility will extract the weekly attendance data from the database into the 'Archive' folder. The extracted data will be saved in a file called "DATE1 to DATE2.mdb" Where DATE1 is the beginning date of the archived data and DATE2 is the end date.

From the Utility Menu, select Archive to access this window.



From this window you can select the beginning date and the end date and then click on the **Archive** button.

It is recommended to run this utility regularly. When the data is archived it is removed from the database making it smaller in size. This will allow Exeba- ACON™ to run faster and will give you the option of backing up individual files from the archive directory instead of backing up the whole database.

## Unarchive Menu

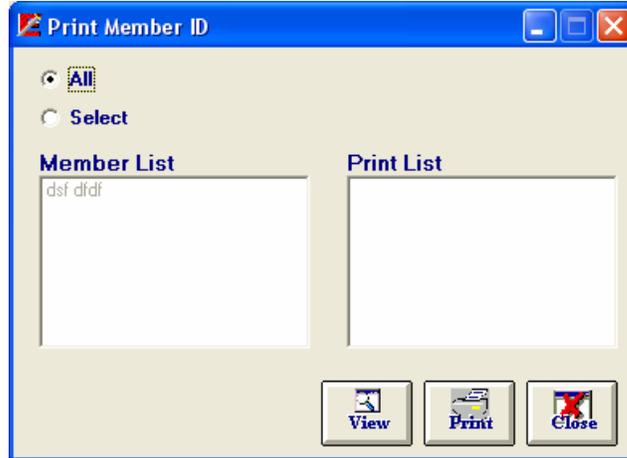
This utility will restore the data you archived using the Archive utility.



Click on **Browse** button to look for archived files under the Archive subdirectory. Select the file you want to De-Archive and click on **Open**. The path of the file will appear next to *File Name* then you can click on **Unarchive** button.

## Print ID Menu

Exeba- ACON™ provides you with a utility to print bar coded ID cards for employees.



Select "ALL," to print all the Members IDs. To select one or more ID, select the option "Select." Then click on the member list for every ID you want to select. Then click on the **View** or **Print** button.

The ID should be printed on a badge laser sheet or letter size page (8 1/2" x 11"). Every page contains up to 3 rows of ID. Each row contains 2 ID's for the same employee.

To exit this window, click on **Close** button.



## Product Support

A variety of resources are available to help you use Exeba<sup>®</sup> - ACON<sup>™</sup>. These resources are covered in this appendix and can be divided into three main sections:

- On-line documentation
- User Guides
- On-line support
- Escan Support

## On-line help

Exeba<sup>®</sup>-ACON<sup>™</sup> has a comprehensive on-line help system that allows you to locate information quickly and easily. On-line help can be accessed from the Start menu. You can also access it while working with Exeba<sup>®</sup> - ACON<sup>™</sup>, by selecting Help from the main menu.

## User documentation

This manual contains detailed information on how to use Exeba<sup>®</sup> - ACON<sup>™</sup>. For commands and questions related to the hardware, you should contact Escan Technologies Corp.

## Customer Support

Escan Technologies Corp. welcomes your questions, suggestions and comments regarding improvements to Exeba<sup>®</sup>-ACON<sup>™</sup> and this manual. Your comments can be mailed to Escan Technologies Corp. or sent electronically via e-mail or via our World Wide Web (WWW) site. If you have a bug report that requires immediate attention, please contact us as soon as possible.

If you would like to purchase any of the hardware described in this manual, you may contact us for the current price and availability.

In order to be eligible for technical support, you must register your version of Exeba<sup>®</sup>-ACON<sup>™</sup> with Escan Technologies Corp. In addition to technical support, you will receive updates as to what is new in the upcoming versions of Exeba<sup>®</sup> - ACON<sup>™</sup>.

When reporting a problem, please include the following information:

- Company
- Mailing Address
- Phone Number
- Your Name/Contact Person
- E-mail Address (if available)
- Exeba<sup>®</sup>- ACON<sup>™</sup> Serial Number
- Date of Purchase
- Operating system (Me, NT, 2000, or XP)

Where to send your registration/correspondence:

**Email Address**

[techsupport@e-scan.com](mailto:techsupport@e-scan.com)

**Telephone**

(909) 270-0043 (9:00 am - 4:00 pm PST)

**Fax**

(909) 270-0920 (24 hours - 7 days a week)

**Standard Mailing Address**

Escan Technologies Corp.

12140 Severn Way

Riverside, CA 92503

## **On-line Support**

As an alternative to mailing your registration, you may contact our WWW site. In addition to on-line registration, you will find an area to post comments or suggestions, read about upcoming versions of Exeba<sup>®</sup> - ACON<sup>™</sup> and related software, and download up-to-date files. Our WWW site is at the following addresses:

<http://www.e-scan.com>

<http://www.exeba.com>

Notes...