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Datawatch Systems, Inc.
4401 East West Highway, Suite 500
Bethesda, Maryland 20814
(301) 654-3282

Customer support
E-mail: helpdesk@Datawatchsystems.com
Phone: (301) 280-4357

Contents

About D3000.DirectAccess

D3000.DirectAccess is a Web-based application that enables you to:

- View card holder records, and activate, modify and deactivate cards.

- Assign access levels to a card holder, and authorize a card holder to enter multiple buildings.

- View and add tenant records.

- View access levels.

- Pre-register visitors and edit or delete their records.

- View event history.

> **Tip:** For many more administrative capabilities, consider using the PC-based DirectAccess Pro program.

About this manual

This manual is organized in the following chapters:

- "Getting started" shows how to log in, log out and perform several common operations.

- "Managing data" provides instructions for working with information accessible within DirectAccess.
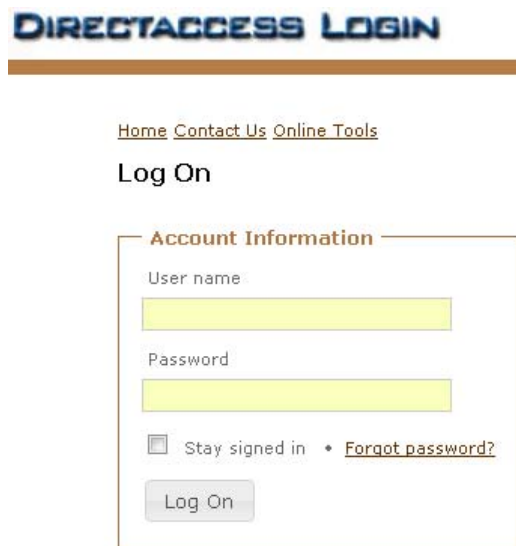
Getting started

Log in to DirectAccess

1. Launch your Web browser.

2. Navigate to www.datawatchsystems.com.

3. In the menu bar, click the **Client Tools** button.

4. In the **Client Tools** page, click **DirectAccess**.

5. In the **Log On** page:

   a. Enter your **User Name**.

   b. Enter your **Password**.

   > 🛈 **Note:** Datawatch Systems issues user names and passwords. If you haven't received a user name and password, please contact the Datawatch Help Desk at helpdesk@datawatchsystems.com.

   c. *To prevent having to log in again after 15 minutes of inactivity:* Activate the **Stay signed in** option.

   d. Click the **Log On** button.

💡 **Tip:** If you can't remember your password, click the **Forgot password?** link. In the **Recover Password** page, enter your **User Name**, then click the **Send** button. Your password will be sent to your e-mail address.

6. The main DirectAccess page is displayed:

Navigation panel   **Search** panel

ℹ️ **Note:** If you don't use DirectAccess for 15 minutes, it locks up to prevent unauthorized use. To continue using the program, click anything to display the **Log On** page, then log on again.

Common operations

Searching

Searching works very much the same in all search panels.

1. In the **Navigation** panel, click the kind of data you want to search. This displays the appropriate **Search** panel.

2. In the **Search** panel:

   a. Select the **Address** (required in all search panels).

   b. If the **Tenant** field is displayed, you can search across all tenants or select a specific tenant in the building.

   c. Select or fill in other information you are looking for.

   d. Use **Sort By** to control the initial sort order. Select **Asc** to set ascending sort order, or **Desc** to set descending sort order.

   e. Select the **Page Size** (i.e., number of records to display at one time).

   f. Click the **Search** button.

Search results are displayed in a table below the search panel.

Working with search results

A successful search results in data organized in a table below the search panel.

> ⓘ **Note:** Features available in a table depend on the data category you searched.

Delete selected records

Click a column heading to sort by that column; click again to sort in opposite direction

	Tenant	S/C	Embossed	First Name	Last Name	Valid Thru	
☐	Datawatch	99	12121	PATRICK	STARR	5/13/2061	Edit | Replace | Details
☐	Datawatch	99	56789	STEPHAN	TERAZON	3/18/2017	Edit | Replace | Details
☐	Datawatch	99	45678	MARYANN	CRABTREE	2/21/2063	Edit | Replace | Details
☐	Datawatch	99	84231	JERRY	JOHNSON	1/15/2069	Edit | Replace | Details
☐	Datawatch	99	11115	RICHARD	STARLING	3/13/2023	Edit | Replace | Details
☐	Datawatch	99	232323	GEORGE	REACHER	6/6/2079	Edit | Replace | Details

1 2 3 4 5

Export to Excel   Export to Word   Export to PDF

Edit record   View Details

Replace card

Select page   Save or view data in another application

Exporting data

1. Click the desired export format (Excel, Word or PDF) below the table.

2. In the export dialog:
   - Click **Open with** to view the data in the appropriate application.
   - Click **Save File** to save the data in the specified format.

Selecting dates

1. Click in a date field. This opens the calendar, which shows three months..

Previous month   Next month

2. If needed, click the previous month or next month arrows, or open the month list (above the left calendar), to select a different month.

3. Click the desired day of the month. The date will be entered in the date field.

Changing your password

1. In the upper right corner, click **Change Password**.

2. In the **Change Password** page:
   a. Enter your **Current password**.
   b. Enter the **New password**.
   c. Enter the new password again in the **Confirm new password** field.
   d. Click the **Change Password** button.

Logging off

When you are finished using DirectAccess, click **Log Off** in the upper right corner.

Managing data

Managing tenant data

Viewing tenant records

1. In the **Navigation** panel, click **Tenant**.

2. Perform a search of tenant data.

Adding a tenant record

1. Click **Create New** in the **Tenant Search** panel. This displays the **Create Tenant** form.
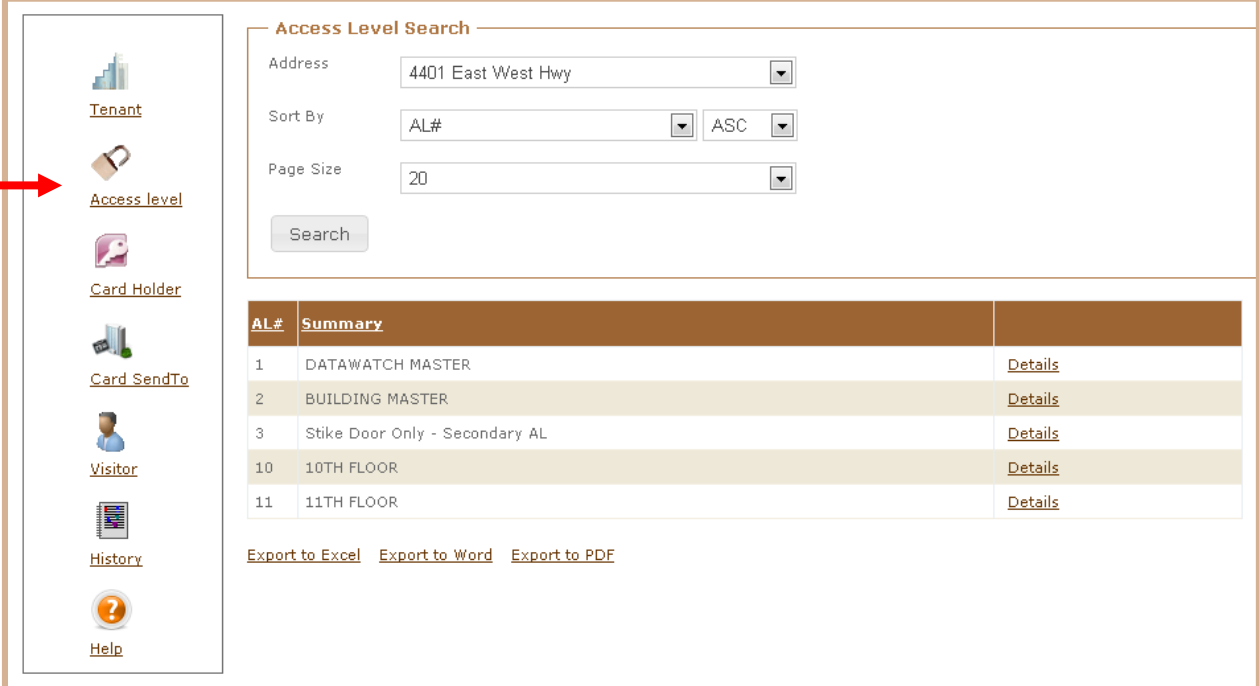
2. Fill in the form.

3. Click the **Save New Tenant** button.

- *To close the **Create Tenant** form without saving any entered data:* Click **Cancel**.

> ℹ **Note:** You cannot delete tenant records. If a tenant must be removed from the tenant list , please contact Datawatch Systems' Help Desk at (301) 280-4357.

Viewing access level data

1. In the **Navigation** panel, click **Access Level**.

2. Perform a search of access level data.

3. For slightly more information about an access level, click the **Details** link.

Managing card holder data

Viewing card holder records

1. In the **Navigation** panel, click **Card Holder**.

2. Perform a search of card holder data.

Viewing a card holder's data details

For the card holder, click **Details** at the right side of the search results table. This displays the **Card Holder Detail** panel.

- *To edit this card holder's data:* Click **Edit** (see "Changing a card holder record," later in this section).

- *To deactivate this card:* Click **Deactivate this Card**.

- *To return to the search results:* Click **Back to List**.

Adding a card holder record

1. Click **Create New** in the **Card Holder Search** panel. This displays the **Create Card Holder** form.

2. In the **Basic Card Info** tab, fill in the form:

> ⓘ **Note:** Fields are required unless otherwise noted.

   a. Select the **Address**, if different from the one displayed.

   b. Select the **Tenant**, if different from the one displayed.

   c. Enter the appropriate **Sitecode**.

   d. Enter the card's **Embossed** number.

   e. Enter the **Encoded** number.

   f. Optional: Enter the card holder's **First Name**.

   g. Enter the card holder's **Last Name**.

   h. Select **Valid From** and **Valid Thru** dates.

   i. Enter the **PIN**.

3. In the **Access Level** box:

a. Open the list and click the desired access level. The selected access level is added to the **Access Level Details** list, as shown in this example:

An access level specifies a building, a primary access level (AL1st) and a secondary access level (AL2nd).

b. *To override the default primary or secondary access level for this card holder:*

   i. Click the button under **AL1st** or **AL2nd**.

   ii. In the **Select Access Level** dialog, click the desired access level, then click **OK**.

c. *To add access to another building (not already included in original access level selected from drop-down list) for this card holder:*

   i. Click **Add Building**.

   ii. In the **Add Access Level Detail** dialog: Select the **Address**, select a primary access level (**AL1st**; click **Detail** for specifics), optionally select a secondary access level (**AL2nd**; click **Detail** for specifics), then click **OK**.

   iii. Repeat to enable this card holder to access other buildings.

d. *To remove access to a building:* Click the checkbox next to that building, then click **Delete**.

4. In the **Extra Card Info** tab (shown below), fill in the appropriate information.

> ℹ️ **Note:** Field labels will be different than shown here. These fields are customized by property managers to hold special data. Contact the Card Key Dept. at 301-280-4310 to customize fields.

Basic Card Info	Extra Card Info

CustInfo1 [ ]
CustInfo2 [ ]
CustInfo3 [ ]
CustInfo4 [ ]
CustInfo5 [ ]
CustInfo6 [ ]
CustInfo7 [ ]
CustInfo8 [ ]

[Save New Card] [Cancel]

5. Click the **Save New Card** button.

■ *To close the **Create Card Holder** form without saving any entered data:* Click **Cancel**.

Changing a card holder record

1. For the card holder, click **Edit** at the right side of the search results table.

2. In the **Card Holder** form, change data as needed.

3. Click the **Update Card** button.

■ *To close the **Edit Card Holder** form without saving any changed data:* Click **Back to List**.

Replacing a card

This procedure enables you to quickly replace a card holder's card without changing any other card holder data (such as name, access level, valid dates, etc.)

1. For the card holder, click **Replace** at the right side of the search results table. The displays the **Replace Card** form.

2. Fill in the form.

3. Click **Replace Card**.

Deleting a card holder record

1. For the card holder, click the checkbox to the left of the tenant's name in the search results table. You can click more than one checkbox to delete multiple card holder records at one time, as shown in this example:

2. Click the **Delete** button.

3. Confirm the deletion.

Managing send to data

Viewing send to records

1. In the **Navigation** panel, click **Card SendTo**.

2. Perform a search of send to data.

Viewing send to details

For the card holder, click **Details** at the right side of the search results table. This displays the **Card Holder Send To Details** panel.

■ *To return to the search results:* Click **Back to List**.

Managing visitor data

Viewing visitor records

1. In the **Navigation** panel, click **Visitor**.

2. Perform a search of visitor data.

Viewing a visitor's data details

For the visitor, click **Details** at the right side of the search results table. This displays the **Visitor Details** panel.

- *To edit this visitor's data:* Click **Edit** (see "Changing a visitor record," later in this section).

- *To return to the search results:* Click **Back to List**.

Adding a visitor record

1. Click **Create New** in the **Visitor Search** panel.

2. In the **Create Visitor** form, fill in each field.

3. Click the **Save** button.

- *To close the **Create Visitor** form without saving any entered data:* Click the **Close** button.

Changing a visitor record

1. For the visitor, click **Edit** at the right side of the search results table.

2. In the **Edit Visitor** form, change data as needed.

3. Click the **Save** button.

- *To close the **Edit Visitor** form without saving any changed data:* Click the **Cancel** button.

Deleting a visitor record

1. For the visitor, click the checkbox to the left of the tenant's name in the search results table. You can click more than one checkbox to delete multiple visitor records at one time.

2. Click the **Delete** button.

Reviewing event history

1. In the **Navigation** panel, click **History**.

2. Use form fields to limit the search's scope.

3. Use the tabs to search by tenant, card, name, etc.

4. Click the **Search By…** button.