ProxessIQ™ Software

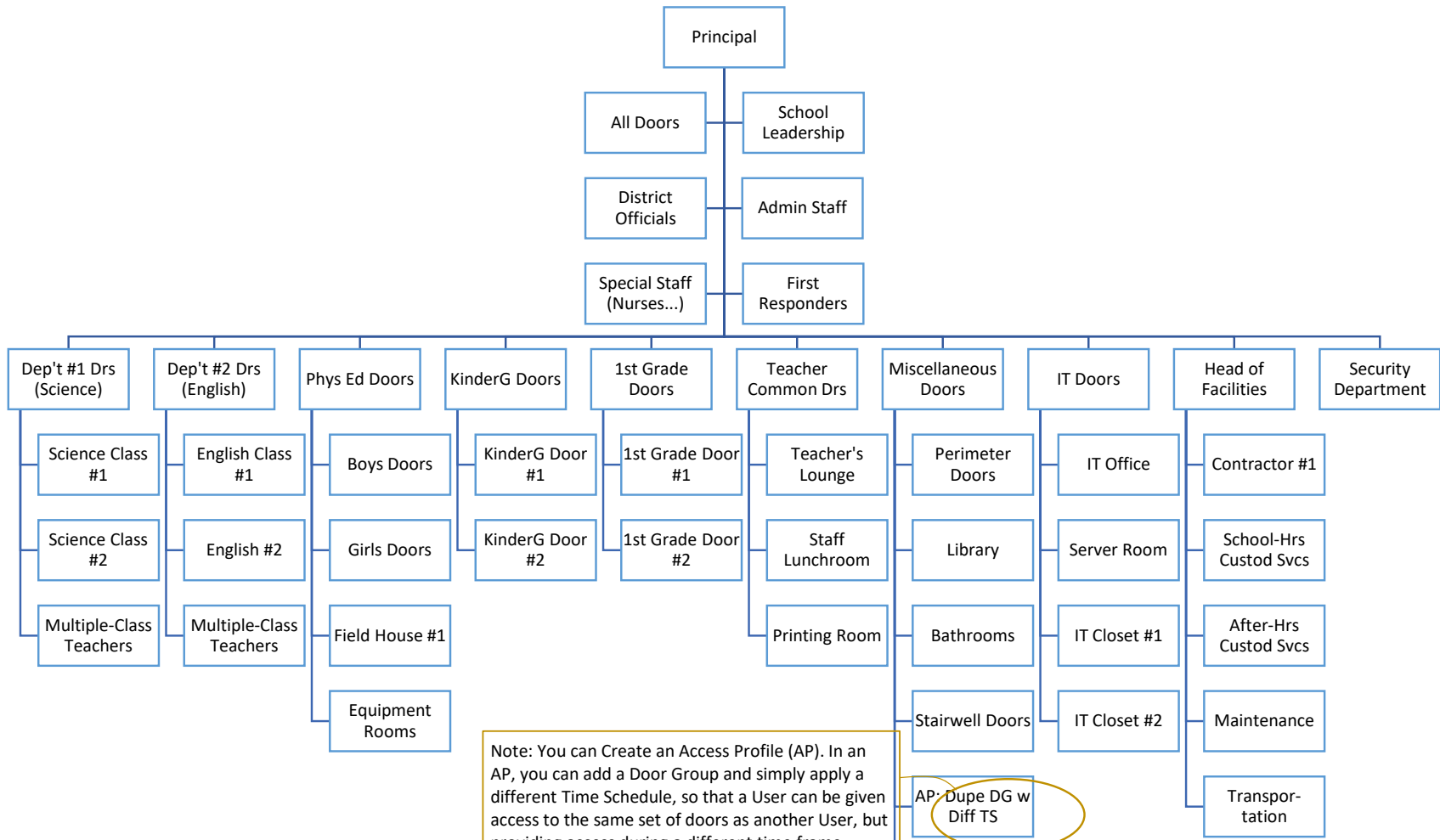# Door Group and Data Entry Tutorial

Guidance for Creating Credential and Access Rights

In preparation for defining and assigning credential access rights in your new access control system, it is important to begin by creating a plan. Without a plan, you will be relegated to adding each door, individually, to every cardholder - a lengthy and frustrating process. This Guide will provide you with a logical plan for organizing and simplifying card-rights assignment resulting in minimal clicks for each card. This will also ensure greater security to your system by assigning credential holders access only to doors in which they need access. Below are some tips.

1. **Tools to help you get started:** The most relevant tool to assist you in defining card-rights is to begin with your company organizational chart or the keying system schematic for your doors. This will help you begin to visualize common groups of people and doors in which to grant access. This is only a two-dimensional chart and as we will discuss, electronic access control systems provide much more flexibility.

2. **Think of Privileges (or Door Groups) as similar to an electronic key chain:** Basically, a Privilege is a right to allow access into a single or a group of doors. A maximum of 24 Privileges can be assigned to any credential. So, if you simply assign rights to each individual door, your "key chain" will fill up after assigning 24 doors to an individual. Rather than assigning access rights for each door to a cardholder, you can group doors and assign a Door Group to a cardholder. This will count as only one privilege, regardless of how many doors it includes. Thus, you can assign 24 Door Groups and individual doors to any single credential. This gives incredible flexibility to your access system when compared to a brass key system.

3. **Create a rough organizational chart:** Per the examples on the following pages, start by identifying the most powerful groups of individuals, departments, etc. and work your way down to individuals with the fewest areas\doors to access. Note that the most powerful door groups are not always the highest people on an organizational chart. For instance, it is not unusual to restrict access rights of senior management positions. Security, Plant and Maintenance directors are often given the highest level of access rights. The following charts are meant to provide examples of departments, staff titles, geographic areas and door types in each of the facility types we have highlighted (K-12, College\University, Hospital, Senior Living, Manufacturing).

4. **Set and organize your groups.** Determine how to separate groups to best reflect access rights of your organization. Is your organization grouped more by buildings/floors or departments? An advantage of access control systems over keying systems is that access systems can utilize a combination of both departments and buildings, times of access and functions of the card...somewhat four dimensional. However, for the system to be managed most effectively, it is recommended to try to keep these disparate groups organized and as logical as possible so that more than one System Administrator can understand and manage the system effectively and over a long period of time.

5. **Identify specialty service credentials:** It is common to have certain specialty credentials "cross" door groups or areas. For instance, there are often janitorial credentials which are quite powerful, allowing access to many hall doors but possibly restricted from high security or private doors. Consider assigning janitorial, housekeeping, IT closets, pharmacy rooms or electrical & mechanical rooms as specialty groups.

6. **Individual doors:** You might want to assign some credential rights to doors outside the access group plan. These might include the president's office, a security office, an HR or accounting records door, etc. You also might want to separate individual doors within a group. For instance, you might want to give equipment managers the same access group rights of a coach but separate the coach's office door as an individual door.

7. **Third & Fourth Dimensions:** As we discussed, brass key systems provide access control in two dimensions; to individual and a group of doors. With electronic access control systems, in addition to just granting access to individual (1st dimension) and groups of doors (2nd dimension), time based permissions (3rd dimension) may be stipulated for each door and door group assigned to a credential. These are called Time Schedules. Further, cards can be assigned additional functionality, to perform functions such as Door Toggling, Passing Through doors in Lockdown and rights to perform and undo Lockdowns (4th dimension). Similar to the above Door Groups discussion, list the most common time schedule increments you plan to assign (including Always and Never which are already default selections in our software) and then you can add the unique custom time requirements as they come up in the assignment process, such as for early deliveries, evening pick-ups, 2nd shifts and custodial services.

Contact a Proxess Representative or Field Engineer if you require further help in this system layout process.

K-12 Sample Door Group Diagram

Principal

- All Doors
- School Leadership
- District Officials
- Admin Staff
- Special Staff (Nurses...)
- First Responders

Dep't #1 Drs (Science)
- Science Class #1
- Science Class #2
- Multiple-Class Teachers

Dep't #2 Drs (English)
- English Class #1
- English #2
- Multiple-Class Teachers

Phys Ed Doors
- Boys Doors
- Girls Doors
- Field House #1
- Equipment Rooms

KinderG Doors
- KinderG Door #1
- KinderG Door #2

1st Grade Doors
- 1st Grade Door #1
- 1st Grade Door #2

Teacher Common Drs
- Teacher's Lounge
- Staff Lunchroom
- Printing Room

Miscellaneous Doors
- Perimeter Doors
- Library
- Bathrooms
- Stairwell Doors

IT Doors
- IT Office
- Server Room
- IT Closet #1
- IT Closet #2

Head of Facilities
- Contractor #1
- School-Hrs Custod Svcs
- After-Hrs Custod Svcs
- Maintenance
- Transportation

Security Department

AP: Dupe DG w Diff TS

AP: Dupe DG w PT, LKDn...

Note: You can Create an Access Profile (AP). In an AP, you can add a Door Group and simply apply a different Time Schedule, so that a User can be given access to the same set of doors as another User, but providing access during a different time frame.
Also in an AP, you can add a Door Group and simply apply a different function for a User, such as for Toggling doors, being a First-In card, initiating and cancelling Lockdowns and Passing Through doors in Lockdown.

Sample K-12 Door Group Chart

K-12 Sample School
Door Groups ➡
Doors ⬇

Doors	Perimeter Doors #1	Perimeter Doors #2	Superin-tendent	Principal	Admin Doors	Teacher Common Doors, Men	Teacher Common Doors, Women	All Doors	IT Admin	IT Closets	Mainten-ance	Custodian Day	Custodian Evening	Cafeteria	Electrical Subs	Mechanical Subs	Boys Phys Ed	Girls Phys Ed	Substitute Teachers	Kinder Department	1st Grade Department	2nd Grade Department	Shop Department	Football Department	Library	Theatre
Main Admin Entry	✔	✔		✔	✔	✔	✔	✔			✔	✔	✔													
Rear Teacher Parking Lot Entry	✔	✔	✔	✔	✔	✔	✔	✔			✔	✔	✔						✔							
Playground Entry	✔	✔		✔				✔			✔															
End of Hall Entry #1	✔	✔		✔				✔			✔															
End of Hall Entry #2	✔	✔		✔				✔			✔															
Bus Loop Entry	✔			✔				✔			✔															
Athletic Fields Entry	✔			✔				✔			✔						✔	✔						✔		
Cafeteria Delivery Entry	✔			✔				✔			✔															
Pricipal's Office			✔	✔				✔	✔				✔													
VP Office			✔	✔				✔	✔		✔		✔													
Admin Office #1			✔	✔	✔			✔	✔		✔		✔													
Admin Office #2			✔	✔				✔	✔		✔		✔													
Counselor Office #1			✔	✔				✔	✔		✔		✔													
Diversity Officer			✔	✔				✔	✔		✔		✔													
Records			✔	✔				✔	✔		✔		✔													
Admin Printer Room				✔	✔			✔	✔	✔	✔		✔													
Supplies Closet				✔	✔			✔			✔		✔													
Security Office			✔	✔				✔	✔																	
Stairwell #1			✔	✔		✔	✔	✔			✔		✔						✔							
Stairwell #2			✔	✔		✔	✔	✔			✔		✔						✔							
Stairwell #3			✔	✔		✔	✔	✔			✔		✔						✔							
Stairwell #4			✔	✔		✔	✔	✔			✔		✔						✔							
Auditorium Entry #1								✔			✔		✔													✔
Auditorium Entry #2								✔			✔		✔													✔
Auditorium Equipment Room								✔	✔		✔	✔														✔
Cafeteria Entry						✔	✔	✔			✔		✔	✔												✔
Cafeteria Food Prep								✔			✔	✔		✔												
Cafeteria Refridgerator								✔			✔	✔		✔												
Cafeteria Storage #1								✔			✔	✔		✔												
Cafeteria Storage #2								✔			✔			✔												
IT Office								✔	✔	✔	✔		✔													
AV Room								✔	✔		✔															
Server Room								✔	✔		✔															
IT Closet #1								✔	✔	✔	✔															
IT Closet #2								✔	✔	✔	✔															
Mechanical Room #1								✔			✔															
Electrical Room #1								✔			✔				✔	✔										
Custodial Supplies Room								✔			✔															
Maintenance Office								✔			✔															
Maintenance Supplies Closet								✔			✔															
Nurse's Office (main)				✔				✔	✔		✔		✔													
Internal Nurse Office Door								✔			✔															
Medical Supplies Closet								✔			✔		✔													
Transportation Manager Ofc.				✔				✔	✔	✔	✔		✔													
Teacher's Lounge				✔	✔	✔	✔	✔			✔		✔						✔							
Staff Lunchroom				✔	✔	✔	✔	✔			✔		✔						✔							
Teacher's Printing Room					✔	✔	✔	✔			✔		✔						✔							
Staff Bathroom - Men						✔		✔			✔		✔													
Staff Bathroom - Women							✔	✔			✔		✔													
Athletics Department				✔				✔			✔		✔												✔	
Coach Office #1								✔			✔		✔												✔	
Coach Office #2								✔			✔														✔	
Athletic Supply Closet #1								✔			✔	✔					✔	✔							✔	
Athletic Supply Closet #2								✔			✔						✔	✔							✔	
Boys Locker Room								✔			✔		✔				✔								✔	
Girls Locker Room								✔			✔		✔					✔								
Football Fieldhouse								✔			✔	✔													✔	
Fieldhouse #2								✔			✔	✔														
Gymnasium #1								✔			✔		✔				✔	✔							✔	
Gymnasium #2								✔			✔		✔				✔	✔								
Library Door #1								✔	✔	✔	✔		✔												✔	
Library Door #2								✔			✔		✔												✔	
Library Supplies Closet								✔			✔														✔	
English Department Head Office				✔				✔	✔	✔	✔															
English Classroom #1								✔			✔		✔													
English Classroom #2								✔			✔		✔													
English Supplies Closet																										
Science Department Head Office				✔				✔	✔	✔	✔		✔													
Science Classroom #1								✔			✔		✔													
Science Classroom #2								✔			✔		✔													
Science Lab #1						✔		✔			✔	✔	✔													

Room	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26
Math Department Head Office				✓				✓	✓	✓	✓	✓														
Math Classroom #1								✓			✓		✓													
Math Classroom #2								✓			✓		✓													
Home Economincs Lab #1								✓			✓		✓													
Shop Class #1								✓			✓	✓											✓			
Kindergarten Class #1								✓			✓		✓							✓						
Kindergarten Class #2								✓			✓		✓							✓						
Kindergarten Class #3								✓			✓		✓							✓						
Kindergarten Class #4								✓			✓		✓							✓						
Kindergarten Supplies Closet								✓			✓	✓								✓						
1st Grade Class #1								✓			✓		✓					✓								
1st Grade Class #2								✓			✓		✓					✓								
1st Grade Class #3								✓			✓		✓					✓								
1st Grade Class #4								✓			✓		✓					✓								
1st Grade Supplies Closet								✓			✓	✓						✓								
2nd Grade Class #1								✓			✓		✓									✓				
2nd Grade Class #2								✓			✓		✓									✓				
2nd Grade Class #3								✓			✓		✓									✓				
2nd Grade Class #4								✓			✓		✓									✓				
2nd Grade Supplies Closet								✓			✓	✓										✓				
3rd Grade Class #1								✓			✓		✓													
3rd Grade Class #2								✓			✓		✓													
3rd Grade Class #3								✓			✓		✓													
3rd Grade Class #4								✓			✓		✓													
3rd Grade Supplies Closet								✓			✓	✓														
4th Grade Class #1								✓			✓		✓													
4th Grade Class #2								✓			✓		✓													
4th Grade Class #3								✓			✓		✓													
4th Grade Class #4								✓			✓		✓													
4th Grade Supplies Closet								✓			✓	✓														
5th Grade Class #1								✓			✓		✓													
5th Grade Class #2								✓			✓		✓													
5th Grade Class #3								✓			✓		✓													
5th Grade Class #4								✓			✓		✓													
5th Grade Supplies Closet								✓			✓	✓														
# od Doors per Door Group	8	5	13	30	8	11	11	106	21	16	97	44	55	5	1	1	6	6	8	5	5	5	1	8	3	4

University\College Sample Door Group Diagram

```
Campus Administration
├── All Campus Doors
├── School Leadership
├── Campus Officials
├── Administrative Staff
├── Special Campus Staff
└── First Responders
```

Engineering Building
- Eelectrical Eng Dep't Doors
- Mechanical Eng Dep't Doors
- Engineering Classroom #1
- Engineering Classroom #2
- Eng Labs
- Eng Lab #1
- All Engineering Building Doors

Social Sciences Building
- Humanities Dep't Doors
- Sociology Dep't Doors
- Sociology Class #1
- Sociology Class #2
- 3rd Floor Access
- Miscellaneous Doors
- All Social Sci Building Doors

Athletic Admin Building
- Athletic Director
- Women's Coach Sport #1
- Men's Coach Sport #2
- Field House #1
- Equipment Rooms

IT Department
- IT Office
- Data Center
- IT Closets Building #1
- IT Closets Building #2
- All IT CLosets in Every Bldg

Dormitory #1
- Residence Admin
- Perimeter Doors
- Stairwell Doors
- Student Amenities
- Hall\Floor Entry
- Dormitory Door #1
- Dormitory Door #2

Athletic Building #1
- Women's Sports Doors
- Men's Sports Doors
- Weight Room
- Laundry Room
- Equipment Room #1

Student Activiy Center
- Book Store Doors
- Dining Services
- Student Run Organizations
- Gerneral Offices
- Deliveries

Miscellaneous Facilities
- Fine Arts
- Library
- Student Health Sevices
- AP: Dupe DG w Diff Time Sched
- AP: Dupe DG w PT, LKDn, Toggle

Head of Facilities
- Contractor #1
- School-Hours Custodial Svcs
- After-Hours Custodial Svcs
- Maintenance
- Transportation
- Sanitation

Public Safety Building
- Interview Rooms
- Admin Offices
- Officer-Campus Door Access

Hospital Sample Door Group Diagram

Hospital Administration

- All Hospital Doors
- Hospital Leadership
- Hospital Officials
- Administrative Staff
- Special Hospital Staff
- External First Responders

Special Services
- Radiology Services
- MRI
- CT
- Blood Storage
- Labs
- Medical Records
- Pharmacy

Adult Critical Care
- Assessment
- Short Term Care
- Physical Therapy
- Long Term Care
- EOL Support
- Nurse Stations

Patient Support
- Behavioral Health
- Social Workers
- Pain Management
- Psychology Support
- Discharge Planning

Cadiology
- Diagnostics Center
- Supplies
- Nurse Stations

OB/GYN
- Delivery Rooms
- Recovery Rooms
- NICU

Emergency Department
- Emergency Triage Rooms
- Doctor & Nurse Offices
- Anesthesia Department
- Supplies

Maternity Department
- Surgical Equipment Storage
- Medicine & Supplies
- NICU
- Delivery Rooms
- Recovery
- Doctor Offices
- Nurse Stations

Main Floor Services
- Gift Store Doors
- Flower Store Doors
- Dining Services
- Independent Support Organizations
- General Offices
- Financial Services
- Electrical & Mechanical Rms

Head of Facilities
- Stairwell Doors
- Contractor #1
- Daytime Custodial Svcs
- Overnight Custodial Svcs
- Maintenance
- IT Department & Closets
- Medical Waste

Public Safety Department
- Interview Room
- Evidence Room
- Officers: Hospital-Wide Door Access
- AP: Dupe DG w Diff Time Sched
- AP: Dupe DG w PT, LKDn, Toggle

Senior Care Sample Door Group Diagram

Hospital Administration

- All Doors
- Administrative Staff
- Multi-Facility Staff
- External First Responders

Special Services	Adult Critical Care	Patient Support	Memory Care	Emergency Department	Main Floor Services	Head of Facilities	IT Department
Radiology Services	Assessment	Behavioral Health	Perimeter Doors	Emergency Triage Rooms	Dining Services	Stairwell Doors	Server Room
MRI	Short Term Care	Social Workers	Memory Care Director	Doctor & Nurse Offices	Library	Contractor #1	IT Offices
CT	Physical Therapy	Pain Management	Supplies	Supplies	Theatre	Daytime Custodial Svcs	IT CLosets
Blood Storage	Long Term Care	Psychology Support	Nurse Stations		Activity Director	Overnight Custodial Svcs	AP: Dupe DG w Diff Time Sched
Labs	EOL Support	Discharge Planning	Dining Services		General Staff Offices	Maintenance	AP: Dupe DG w PT, LKDn, Toggle
Medical Records	Nurse Stations		Laundry		Laundry	Mech & Electrical Closets	
Pharmacy					Beauty Salon	Medical Waste	
					Fitness		

Manufacturing Facility Sample Door Group Diagram

```
                                    Senior Company
                                       Officers
                                          |
                         +----------------+----------------+
                     All Doors                      First Responders
                         |
  +--------+--------+--------+--------+--------+--------+--------+--------+
Accounting  Admin-  Engineering Labs  Proto-  Production Shipping  Head of   IT
           istration                  typing &          &        Facilities Department
                                      Test              Receiving
```

Accounting	Administration	Engineering	Labs	Prototyping & Test	Production	Shipping & Receiving	Head of Facilities	IT Department
CFO	Human Resource Manager	Head of Engineering	Laboratory #1	Head of Testing	Director of Operations	Supplies	Stairwell Doors	Server Room
Accounting Office #1	Executive Office #1	Electrical	Laboratory #2	Supplies	High-Dollar Inventory	Deliveries	Contractor #1	IT Offices
	Executive Office #2	Mechanical	Restricted Materials	Machine Shop	High-Dollar Tools	Pick-ups	Daytime Custodial Services	IT Closets
	Marketing	Drafting	Supplies	Testing Rooms	Activity Director		Overnight Custodial Svcs	AP: Dupe DG w Diff Time Sched
	Sales		Waste		Lunchroom		Maintenance	AP: Dupe DG w PT, LKDn, Toggle
	General Staff				1st Shift Doors		Mech & Electrical Closets	
	Perimeter Doors				2nd Shift Doors		Medical Waste	

Create your Door Group list to be entered into the ProxessIQ™ software:

NOTE: Download the ProxessIQ ™ Data Entry Excel ™ Workbook from our Support webpage

List your Door names in Column A, beginning with cell A8.
List your Door Group names in Row 7, beginning in cell B7.
For each Door Group, place a "y" in in the cell for the Doors that are a part of that group.

	Door Grp 1	Door Grp 2	Door Grp 3	------	Door Grp *n*
Door 1	y	y	y		y
Door 2	y		y		
Door 3	y		y		y
Door 4	y	y			
…					
Door *n*	y				

Create your Time Schedule list to be entered into the ProxessIQ™ software:

NOTE: Download the ProxessIQ ™ Data Entry Excel™ Workbook from our Support webpage

List your Time Schedule names in Column A, beginning with cell A9.
List the Start & Stop times for each Time Schedule in columns B & C.
Type a "y" in the cells corresponding to the days that TS will apply.

Time Schedules

Time Schedule Name	Time Interval Start Time	Time Interval End Time	M	T	W	T	F	S	S	Holiday
Always			y	y	y	y	y	y	y	y
Never										
Administration	6:30	5:00	y	y	y	y	y			
School Day (Time Interval 1)	6:30	7:00	y	y	y	y	y			
Time Interval 2	7:00	11:00	y		y		y			
Time Interval 3	12:00	2:30		y		y				
Time Interval 4	2:30	3:00			y		y			
Summer School Hours	7:00	2:30	y	y	y	y	y			
After School Outdoors	2:30	6:00	y	y	y	y				
After School Indoors	2:30	5:00	y	y	y	y				
After Hours (Custodian…)	2:00	9:00	y	y	y	y				

Create your Access Profile list to be entered into the ProxessIQ™ software:

NOTE: Download the ProxessIQ ™ Data Entry Excel™ Workbook from our Support webpage

List your Access Profile names in Column A, beginning with cell A9.
Type in the exact name of the Door Groups, Doors & Time Schedules that will be assigned to each AP.
Up to 24 total Doors and Door Groups can be added to an AP, but for import convenience, we only show 4 here.
Type a "y" in the cells corresponding to the additional four rights that will apply.

Access Profile Name	Door Group Name #1	Time Schedule	Door Group Name #2	Time Schedule	Door Group Name #3	Time Schedule	Door Name #1	Time Schedule	1st Person Checkbox	Toggle Checkbox	Pass Through Checkbox	Lockdown Checkbox
AP #1	Door Group Name	TS Name	Door Group Name	TS Name	Door Group Name	TS Name	Door Name	TS Name				
AP #2	Door Group Name	TS Name	Door Group Name	TS Name	Door Group Name	TS Name	Door Name	TS Name	y			
AP #3	Door Group Name	TS Name	Door Group Name	TS Name	Door Group Name	TS Name	Door Name	TS Name			y	
AP #4	Door Group Name	TS Name	Door Group Name	TS Name	Door Group Name	TS Name	Door Name	TS Name		y		y

Default AP

Create your User\Cardholder list to be entered into the ProxessIQ™ software:

NOTE: Download the ProxessIQ ™ Data Entry Excel ™ Workbook from our Support webpage

List your User\Cardholder names in Column A, beginning with cell A9.
This spreadsheet does not accommodate the labeling of the Individual Door Attributes, but note them for input into the ProxessIQ software.
For the purposes of this spreadsheet, make a second row for any User/cardholder that will have a 2nd Credential

Users			Access Profile Rights					Individual Door Attributes					
First Name	Last Name	Credential	Access Profile #1	Door Group #1	Door Group #2	Door #1	Door #2	Time Schedule	1st Person Checkbox	Toggle Checkbox	Pass Through Checkbox	Lockdown Checkbox	Extend Opening Checkbox
John	Smith	Daily Card											
Emily	Purdue	Vehicle Card											