



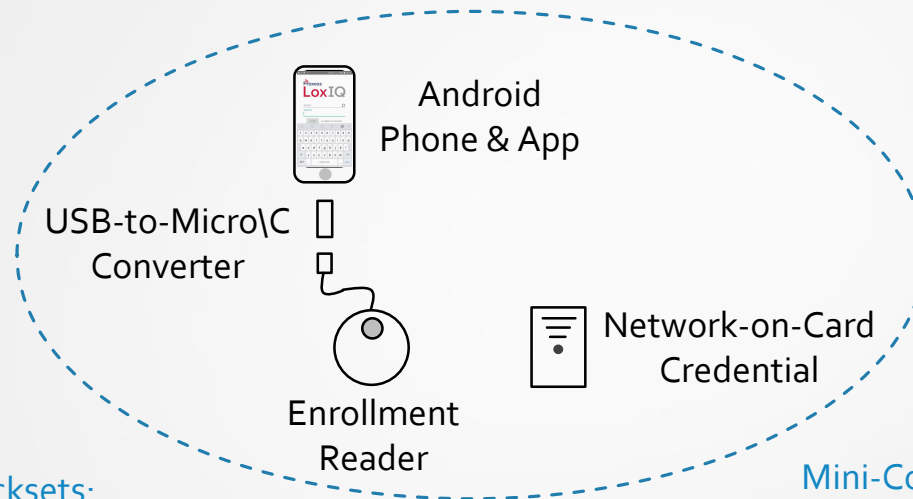
LoxIQ™

OPERATIONS MANUAL

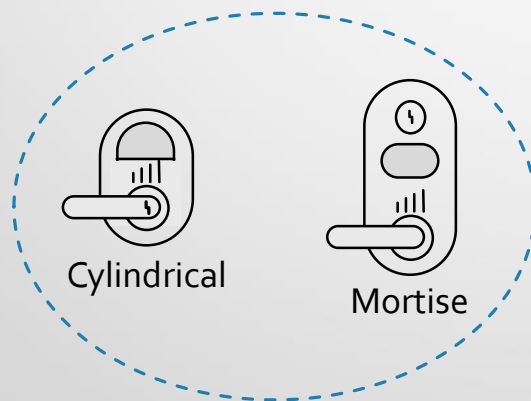


System Components

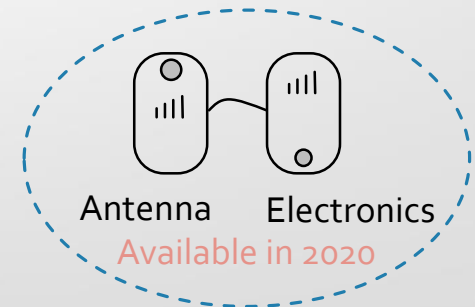
Communications



Locksets: Wire-Free & On-Demand



Mini-Controller (Reader-Controller): For Panic Hardware & Storefront Doors





Equipment & Operation: Start-up Guide

The process of setting up a Proxess LoxIQ™ security system may be broken down into a few elements and operations.

Here are the minimum required components:

- Android Smart Phone or Tablet (for each LoxIQ™ “server” and “client”) - OTG (On-the-Go) compatibility
- LoxIQ™ Download link from the Google Play Store
- Proxess Credential Enrollment Reader (USB connector)
- OTG Converter (Converts USB-C or USB-Micro from your phone to USB for the Enrollment Reader)
- Network or Internet connection for additional “Client” phones (only for initial setup and for changes)
- Common WiFi connection to Internet for primary LoxIQ™ phone, or mobile phone plan with connection between the primary LoxIQ™ phone and the additional “Client” LoxIQ™ phones (only required for changes)
- One (1) or more Proxess Cylindrical or Mortise locksets or Mini-Controller (reader-controllers)
- Screwdriver to install locksets in Cylindrical door prep and a drill to prepare the 3/4” hole for a Mortise lockset
- Proxess smart credentials (cards, stickers, fobs)

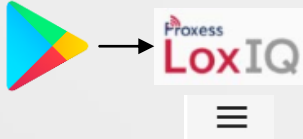
Here is the basic operational sequence:

- Create a Gmail account and download & install the LoxIQ™ application
- In LoxIQ™, Register an Organization, add & configure a Door, Door Group (optional), Time Schedule and Users
- Invite other Administrators to manage the system with you (full or limited rights)
- In the Doors menu, click the “Sync” icon (hold the phone near each lockset & give it several seconds)
- Or, in the Main menu, click “Auto Sync” (hold the phone near each lockset & give it several seconds)
- Connect the USB Enrollment Reader to the phone, using the USB converter appropriate for your phone
- Go to the desired cardholder in the Users menu
- Keep the cards at least six (6) inches away from the enrollment reader
- Click on “Info” and select “Create” and then place a new credential on the Enrollment Reader
- Swipe card on a lockset or reader-controller to gain access



Quick Start Guide

(Click to return here from any page)



- **Software (App) Installation:** Install the LoxIQ™ app from the Google Play Store
- **Home Screen:** Opens the Main Menu screen below

Click for Section Links	Vesper john.smith@proxess Account settings Organizations Logout Version: 1.0.2	<ul style="list-style-type: none">• Organization: The displayed menu is for this Organization\Customer\Site\Account.• Current Operator: Shows the current operator's email (entered during Registration).• Account Settings: Manages all the mobile phones which are associated with and can view or manage this Account.• Organizations: Register new and login to existing organizations\accounts\customers\sites. Send invitations to other phones to manage this Account\customer\organization\site.• Logout: Logout of the LoxIQ™ app and all Accounts and activity.• Version: Current version of the LoxIQ™ app. Updates can be found on the Google Play store
	Doors	<ul style="list-style-type: none">• Doors: Add and manage Doors (wireless locksets and -controllers) and Door Groups for this organization\customer\site. Sync with individual Mini-Controller doors.
	Users	<ul style="list-style-type: none">• Users: Add\Modify\Delete credential holders and their credentials.
	Audit logs	<ul style="list-style-type: none">• Audit Logs: View and share door and credential activity for the current organization\account\customer\site.
	Auto Sync	<ul style="list-style-type: none">• Auto Sync: Automatically synchronizes the database with doors in close proximity, as you walk through a facility.
	Firmware	<ul style="list-style-type: none">• Firmware: Update locksets and Mini-Controllers with the latest capabilities.
	Settings	<ul style="list-style-type: none">• Settings: Define the organization's global system and operational defaults.

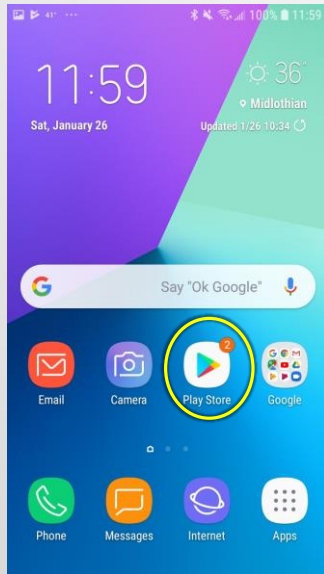


SOFTWARE DOWNLOAD & INSTALLATION

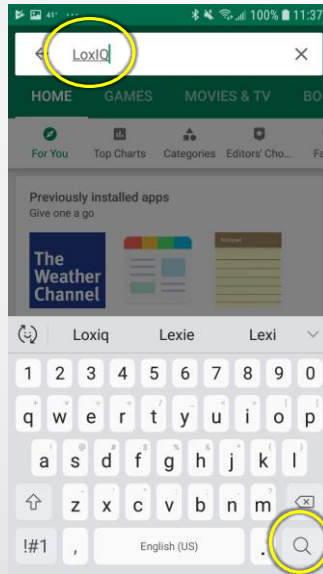


Where do I download the LoxIQ™ app?

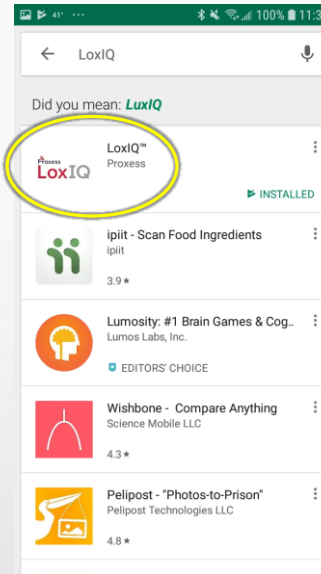
Locate the Google Play Store icon on your phone or tablet



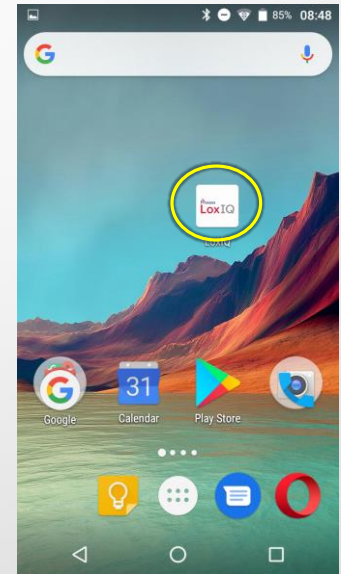
Type LoxIQ™ in the bar and then click the Search button



Click the LoxIQ™ result to have the application install



Once its installed, the LoxIQ™ icon will appear on the desktop



Alternatively, from the Google Chrome browser on your Android phone, go to:
<https://play.google.com/store/apps/details?id=com.proxess.loxiq>

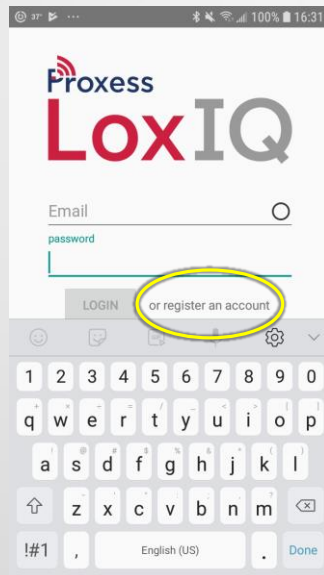


Program LoxIQ™



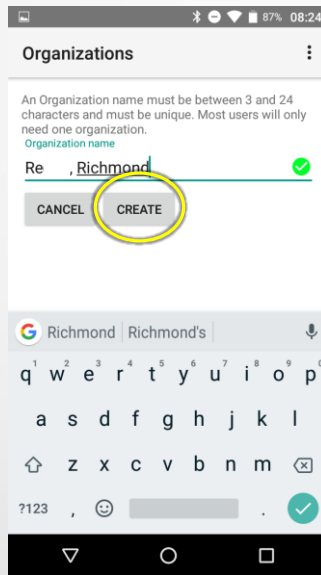
Logging In & Creating Organizations

Register a new "Account" or login to an existing one



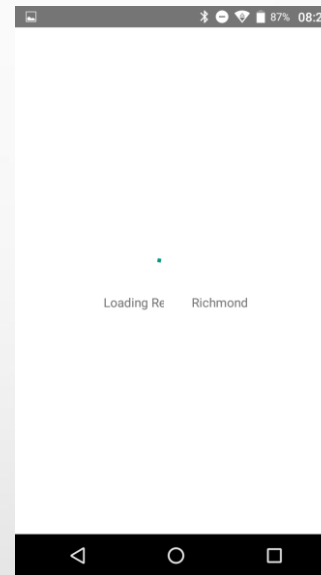
An "Account" is typically the installation company, or the end-user, if they are self-managing.

Enter a name for your first, or Create a new "Organization"

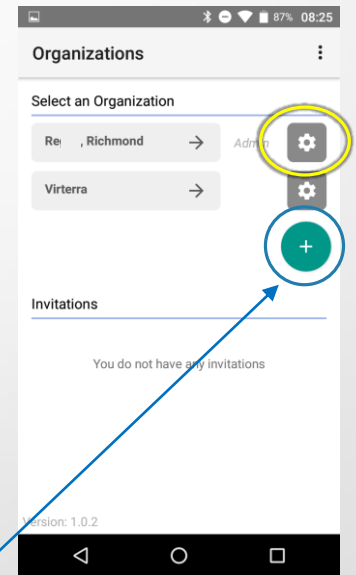


An "Organization" is typically a Customer name, or the name of one of their locations. A new Organization can be created any time from the Organizations page, clicking on the "+" sign.

The new Organization is created on the secure cloud server



Your new Organization appears, along with others you can view or manage. Click the "Settings" icon

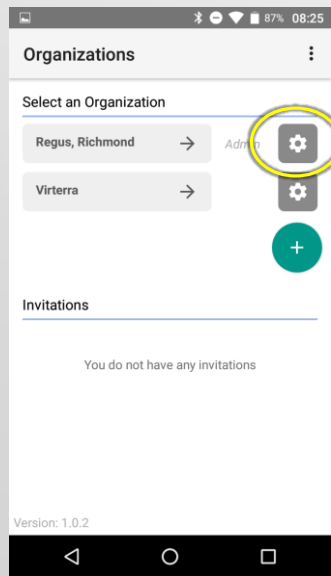


"Admin" rights are granted to the creator of an account, or may be given to an operator by another administrator, through an "Invitation". Only an Admin can send an Invite.

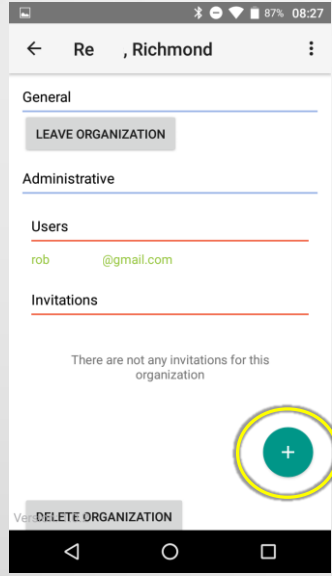


An Organization's "Settings" Menu

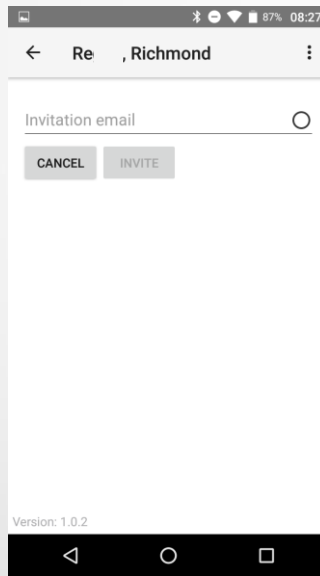
Click the "Settings" icon for the Organization of interest



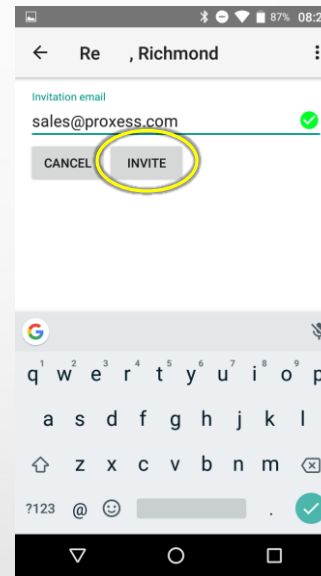
Click the "+" icon to invite another operator (User) to view or manage this Organization



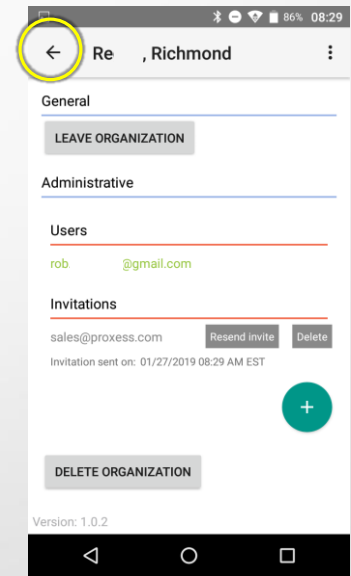
This screen appears. You may click cancel to stop this process



Type the email of the new operator (User) you are inviting and click "Invite"



All the Users (Operators) assigned to this Organization and all the pending invites (like the one you just sent) are shown here. Click the back-arrow to continue programming.



Click "Leave" to go back to the screen listing all the Organizations you belong to. You may click "Delete" to delete this Organization

You may "Delete" or "Resend" and invite to a specific operator (User) and click "+" to add another invitation. You may click "Delete" to delete this Organization.



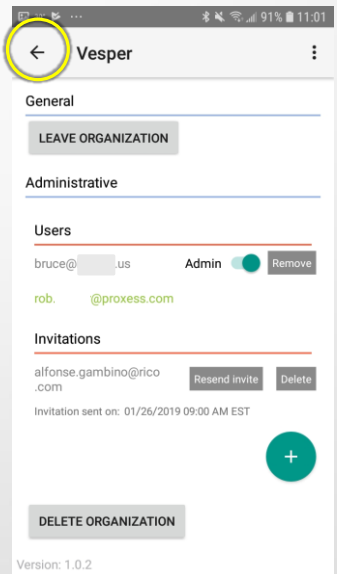
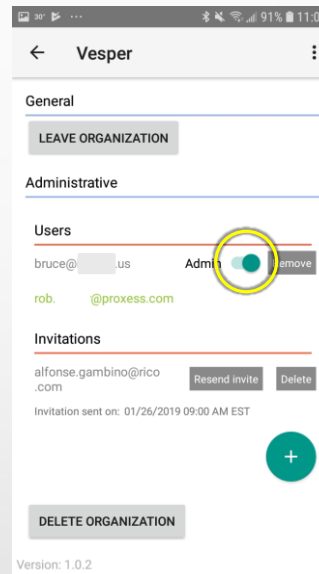
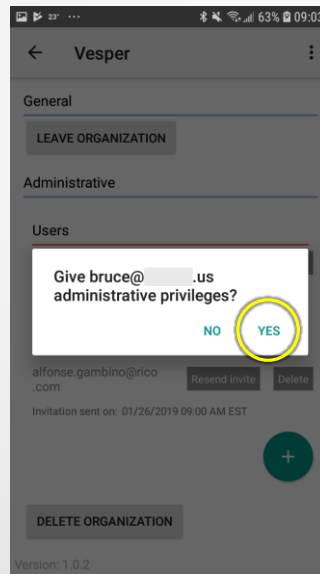
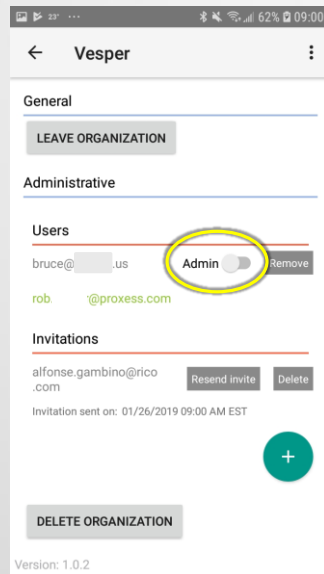
Granting "Admin" Rights

While in the Organization's Settings page, select a User (Operator) to grant Admin rights, as opposed to just general editing. Click "Admin".

This verification screen appears. Click "Yes" to upgrade their rights.

The operator's updated rights now appear. Operators can be removed at any time here.

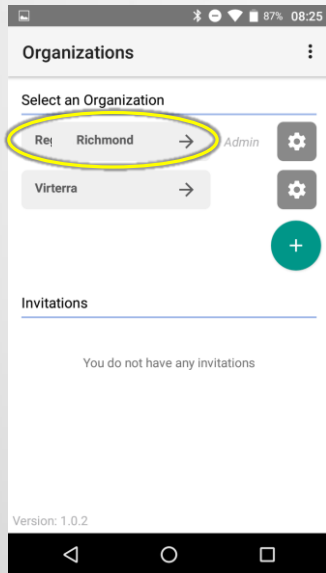
Click the back-arrow to continue programming.





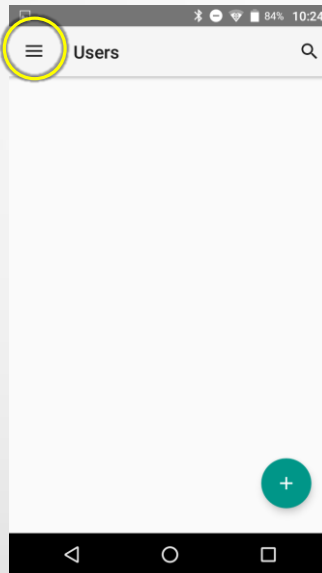
Enter an Organization to Begin Programming

Enter an Organization to begin or continue programming or auditing

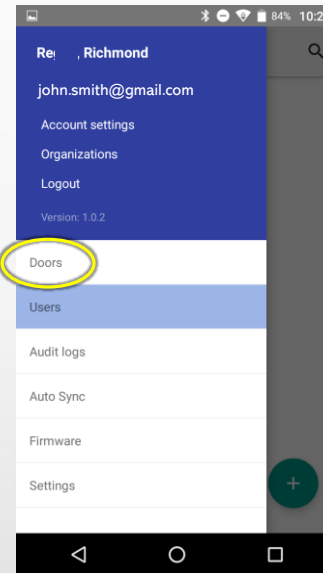


Note: The system data will now be loaded from the secure cloud server. Depending on your Internet speed, this will take a few seconds.

The first time you enter an Organization, the opening screen shows an empty Users (Credential Holders) for this Organization. The Users screen can always be accessed from the Menu button. Click it.



Clicking the Menu button from anywhere in LoxIQ™ brings up the Main Menu Screen. We will begin our programming in the Doors section. Click "Doors".

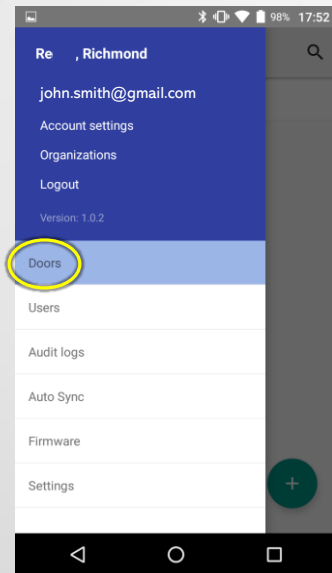


Go to the Quick Start Guide on page 4 of this manual for a review of each of the Menu items.

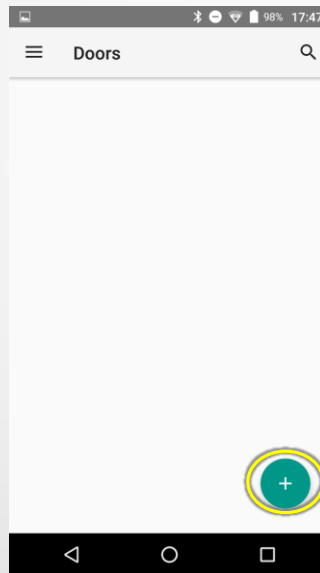


Adding Doors - 1

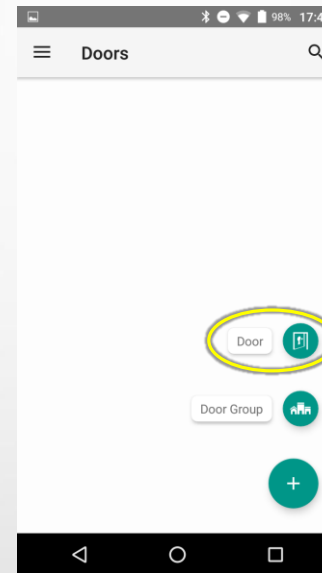
From the Main menu, click on the Doors tab.



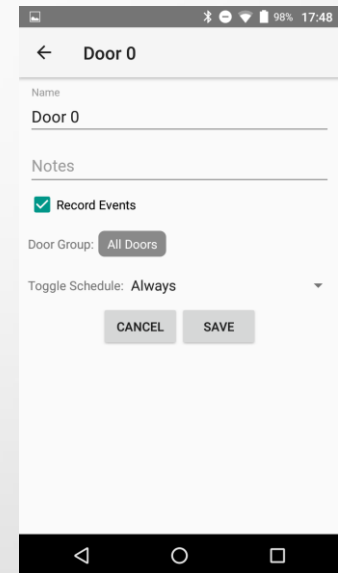
Add your first door by clicking on the "+".



Click on "Door" to add one (By default, "All Doors" is built-in and we'll add a Door Group in a few pages).



The new door screen defaults the name of a door to "Door 0". Go to the next page in the manual.



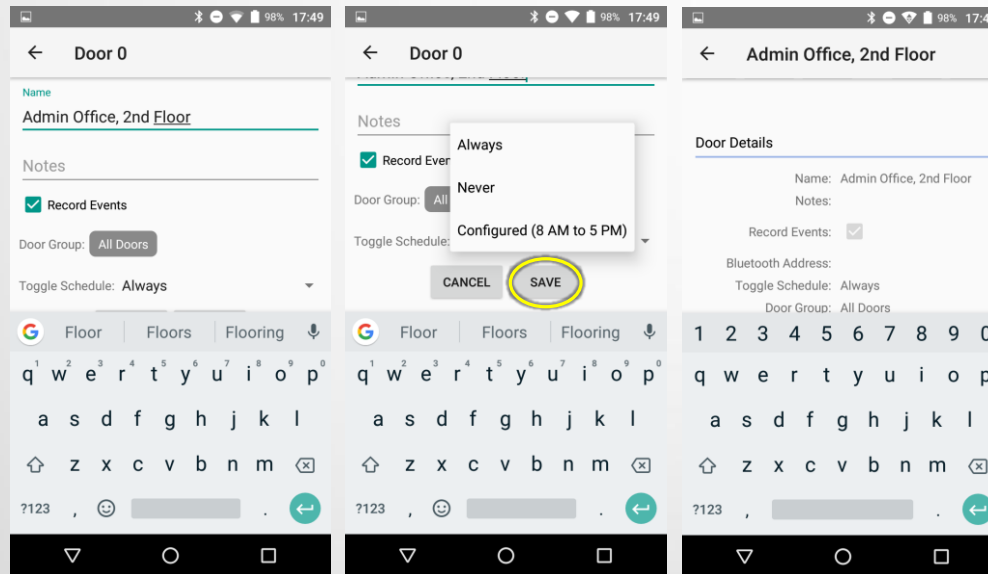


Adding Doors - 2

Type in the new name for the door (or, the default name may be kept).

Select the desired Toggle Schedule for this door. The custom Time Schedule is set up in the "Settings" menu. Click "Save".

The new Door has been saved. Go to the next page in the manual & scroll the phone's screen down to see the top menu.



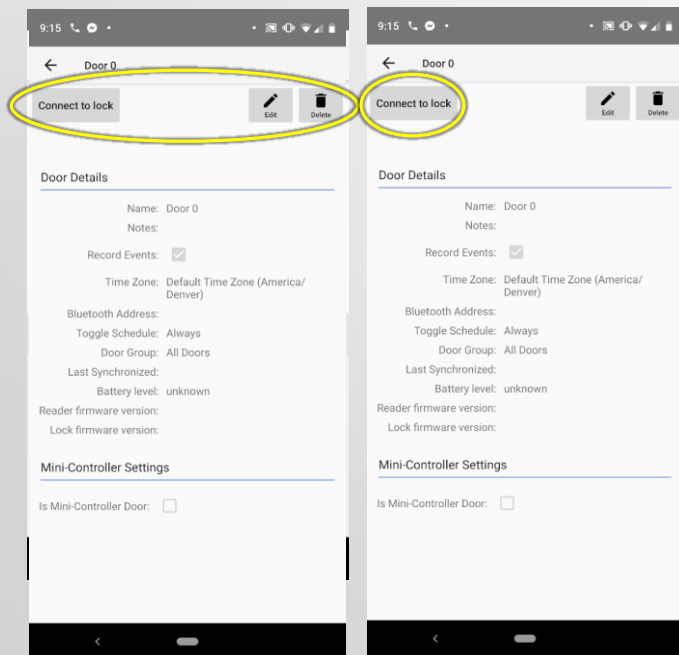
Toggle must be enabled in a lock for a card to use the Toggle function. To perform a Toggle on a lock, a valid card, with Toggle enabled for that time, must be swiped twice within 5 seconds. The lock will be alternately put into an unlocked and then locked states. Future time schedule changes will automatically put the lock into the programmed state.



Adding Doors – 2.1

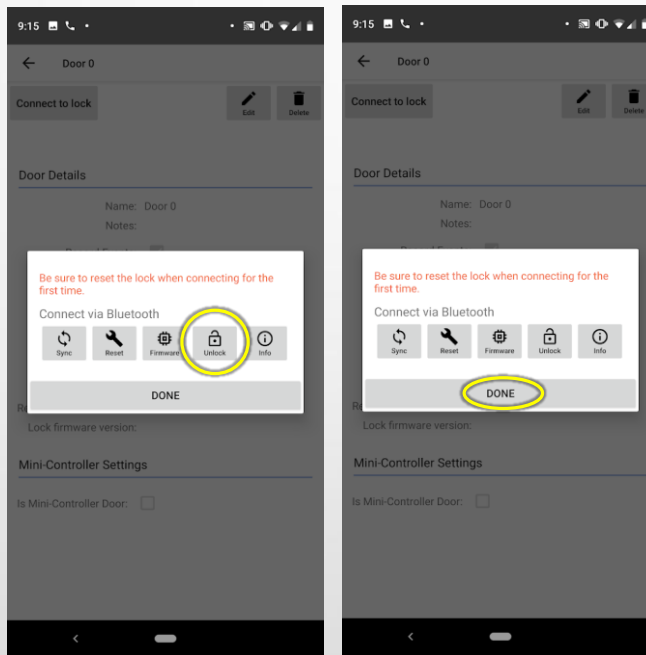
Note: The following is the updated User Interface (UI) at the top of each individual Door screen. For best performance, please update your app to the newest version available in the Play store, though either UI will work.

Click on “Connect to lock” to view the new User Interface

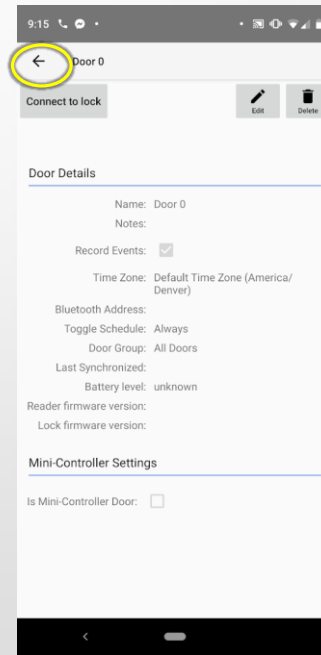


This is the new UI for functions related to connecting to the door. Clicking “Unlock” will momentarily open the lock.

This is the new UI for functions related to connecting to the door. Click “Done”



Click the back-arrow to go to the main Doors screen.



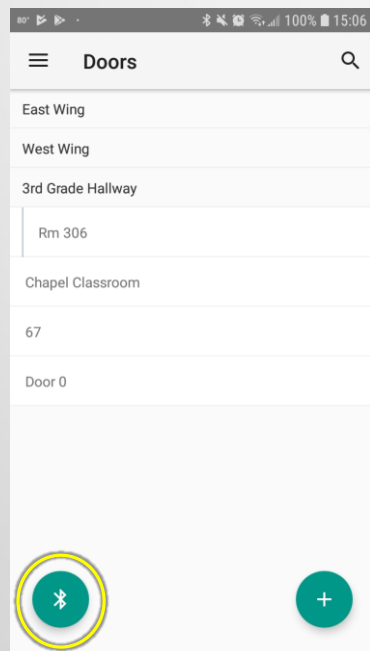
The functions within these icons operate the same as they have in earlier versions of the LoxIQ™ app.



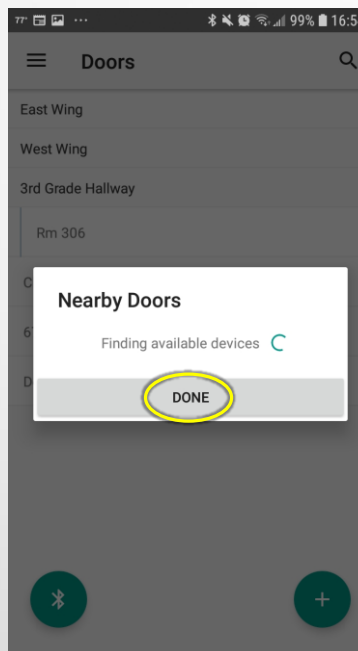
Adding Doors – 2.2

Note: The following is the updated User Interface (UI), showing an additional icon at the bottom of the “Doors” menu. For best performance, please update your app to the newest version available in the Play store, though either UI will work.

Click on the Bluetooth icon to view the new User Interface screen



This provides a shortcut to locate all nearby doors that you may choose to connect to.



Click “Done” to complete this update awareness.



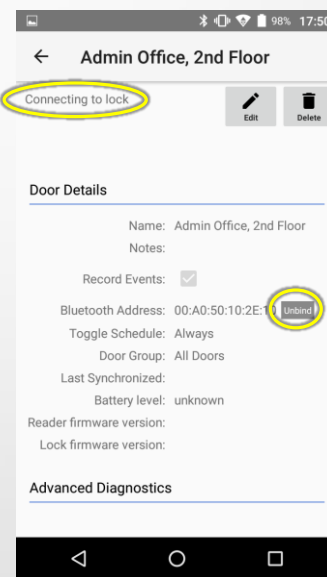
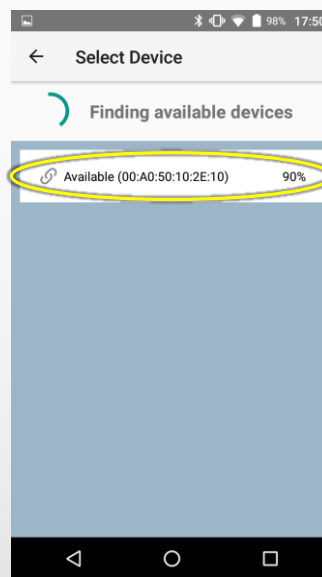
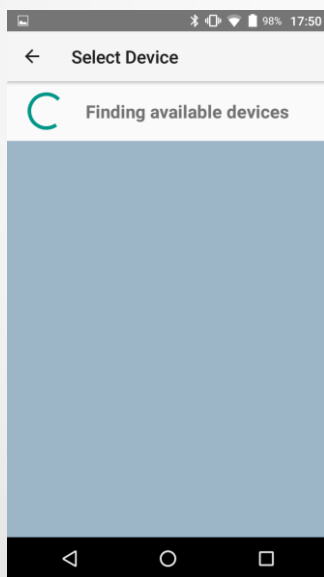
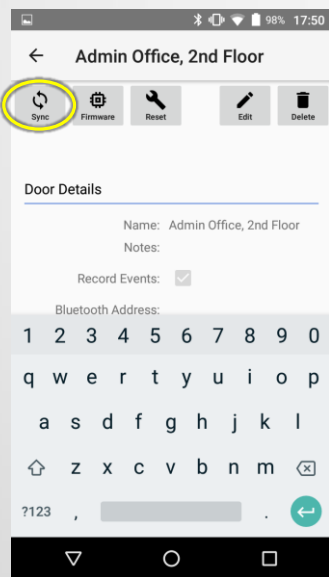
Initializing the Lock

To initialize a lockset or Mini-Controller, click "Sync". Syncs should be performed within a few feet of the door, but can be performed within about 20 feet.

The first time a lock is Sync'd, the software will try to find an available Proxess lock (one that has not been programmed).

Once the available lock has been located, click on the address that pops up. If there are many locks in the area, bring the phone up to the one you want to sync and its signal strength will be highest.

"Connecting to Lock" will show when the lock is being sync'd and given an encryption key to this instance of the software. After clicking "Unbind" the lock will be able to be moved to another door in the same system.



Sync tips: To sync most quickly and reliably, try to wake the lock with either a card or metal presentation to the reader, or a turn of the inside\exit lever. It is normal for the sync process to take several seconds to begin and, on occasion, to require a couple of tries.

When the screen shows that the lock has been sync'd, go to the next page in the manual.
Note: to move the lock to a new system ("Organization"), the lock must be "Reset".

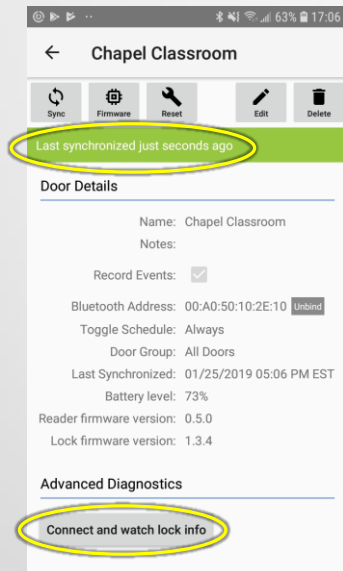


Other Door Information & Options - 1

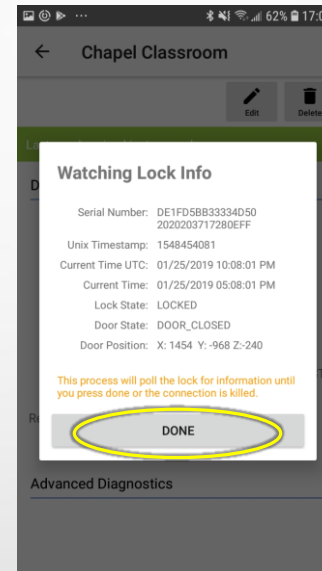
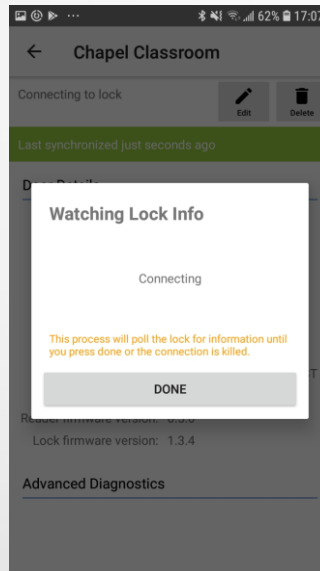
Once a door has either been initialized, or sync'd an additional time, that message becomes part of the Door Details section. For advanced diagnostics, click on "Connect and watch lock info"

The connection status is shown and the action may be cancelled by clicking "Done".

Once the diagnostics connection is made, further detail of the lock is displayed. The dynamic accelerometer movement of the lock in the X, Y & Z planes is also shown. Click "Done" to close.



The Battery Level and Firmware are also displayed & updated with each sync. Click "Edit" to change the Door Group, Toggle Schedule and event recording checkbox.





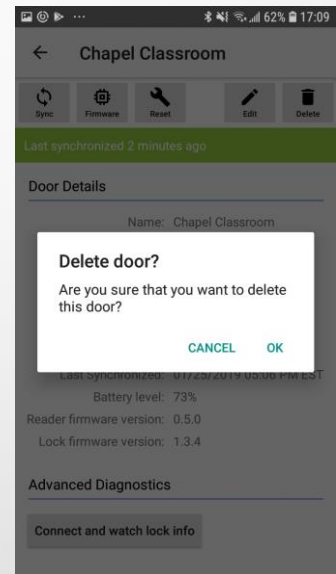
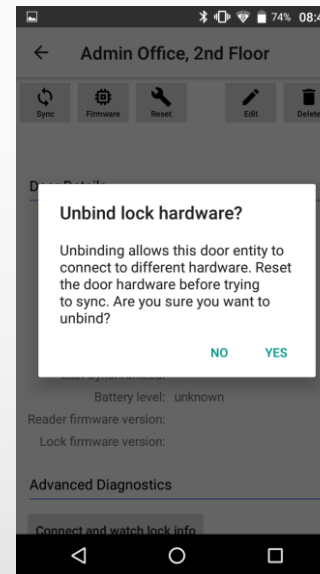
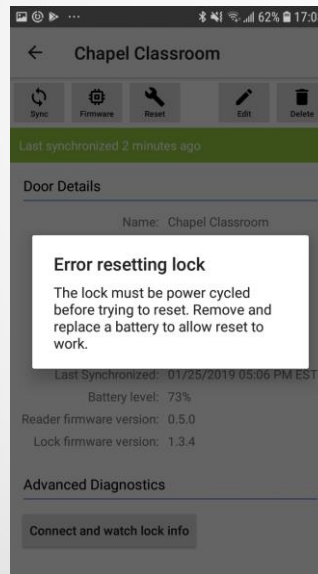
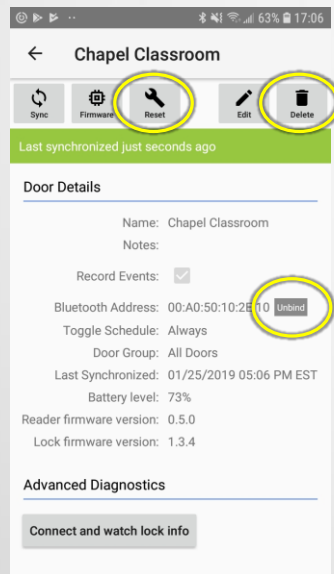
Other Door Information & Options - 2

Should there be a complication during the operational cycle of the lock, or after a firmware upgrade, a factory reset may be applied, by power-cycling the lock and then clicking "Reset".

Attempting to Reset the lock before power-cycling will result in this message.

Clicking on "Unbind" (next to the Bluetooth Address) disassociates this lock from this software. The lock will now be able to be programmed as a new in the same Organization.

Clicking "Delete" will ask you to verify deleting this door from the system, permitting it to be installed as part of another Proxess system.



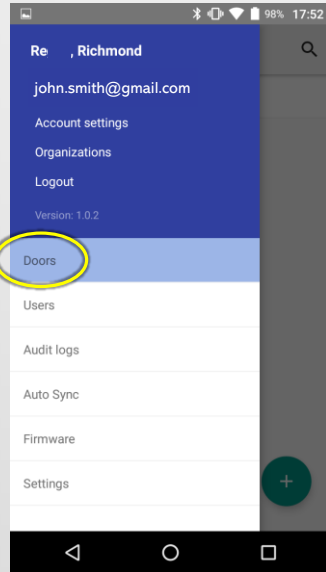
A Reset can only be done by a phone/tablet from the software in which the lock is connected. After a reset the lock can be programmed into another Proxess system ("Organization").

Note: to move the lock to a new system ("Organization"), the lock must be "Reset".

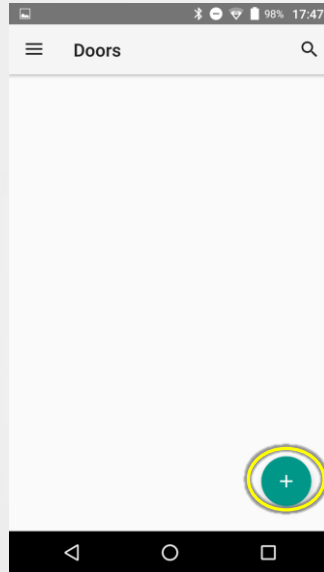


Adding Door Groups

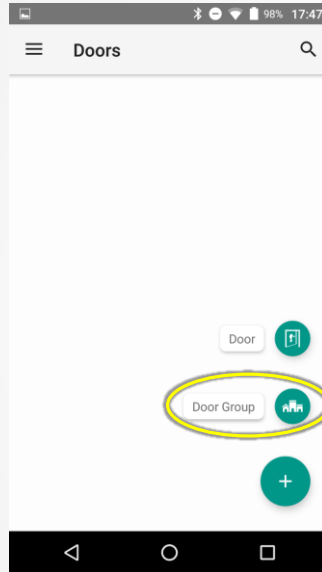
From the Main menu, click on "Doors".



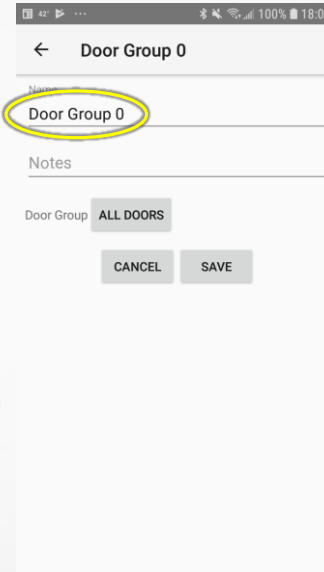
From the Doors menus, add your first door by clicking on the "+".



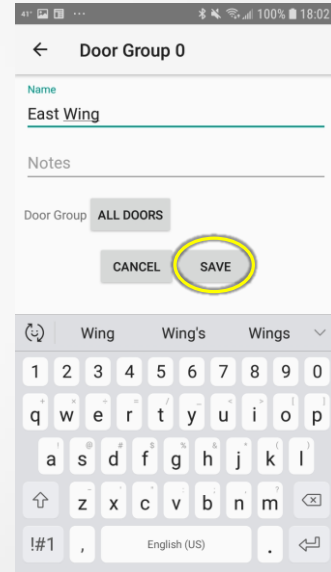
Click on "Door Group" to add one.



The new door group screen defaults the name to "Door Group 0".




Type the new group name and click "Save".

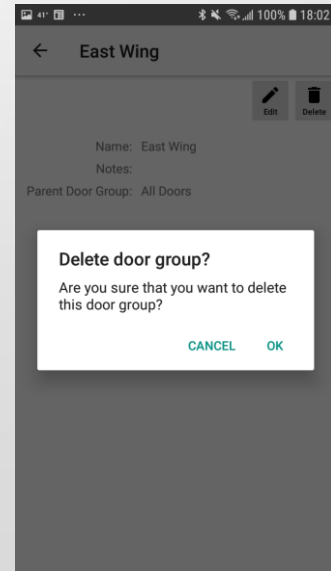
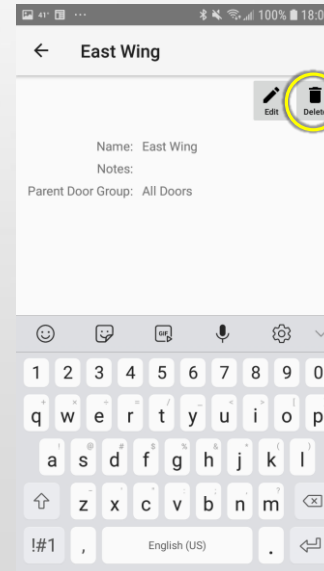
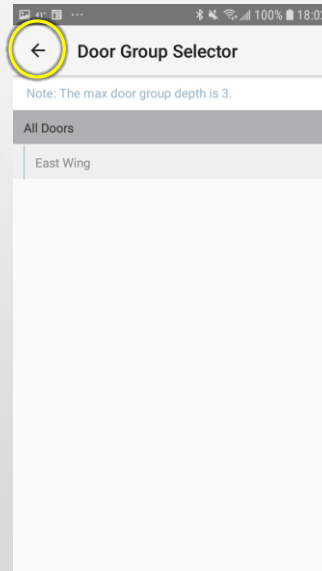
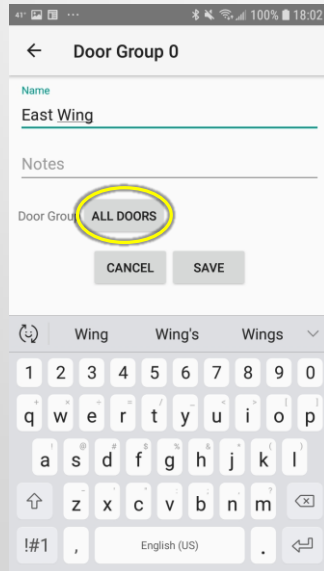


To review the hierarchy of your Door Groups, click "All Doors".

Click the back arrow to return to programming. As you add Door Groups, you can "Edit" any Door and change the Door Group it is in.

To delete a Door Group, click the "Delete" icon and then "OK" to confirm.

Click the back arrow icon and then click the Menu  button.

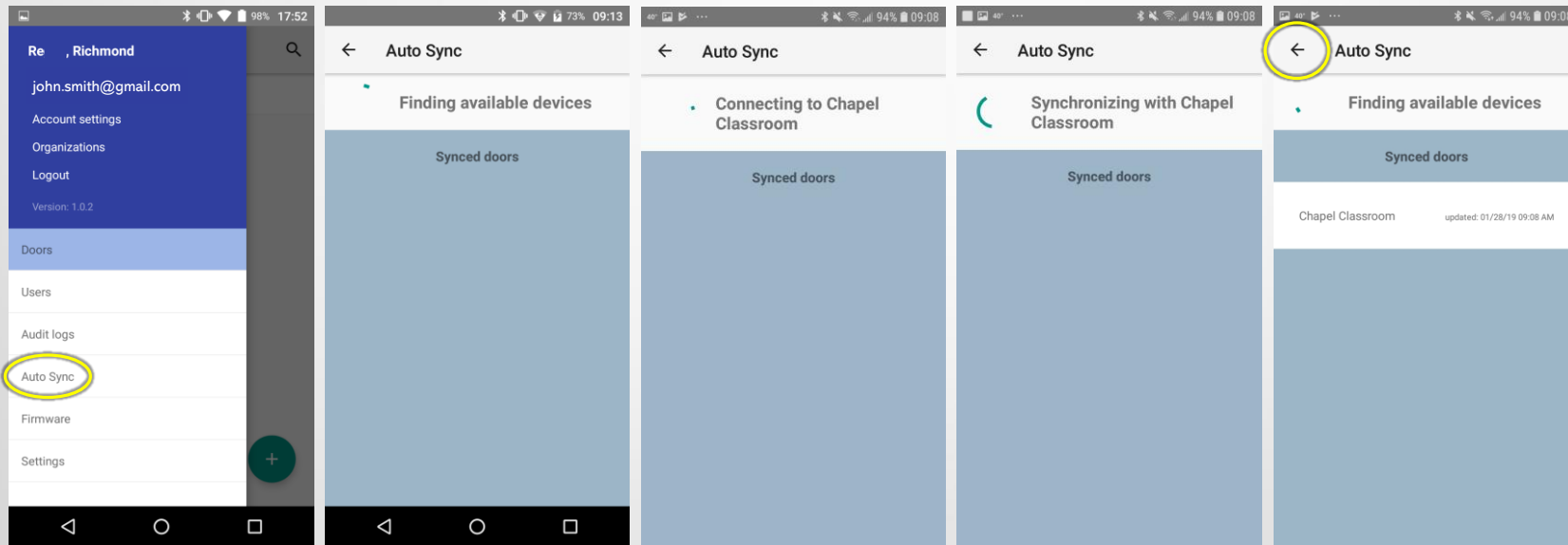




Auto Sync with Locks

Rather than performing a Sync one lock at a time from the Doors screens, you may go to the Main Menu and click "AutoSync", which automatically finds, connects and syncs with locks, typically within a few feet, as you walk through a facility. If there are many locks visible, Auto Sync will choose the one with the best signal strength first.


Once all of the locks have been sync'd, you may click the back arrow to return to the system.

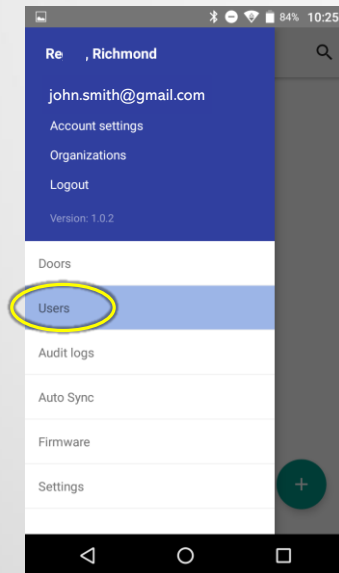


Sync tips: To sync most quickly and reliably, try to wake the lock with either a card or metal presentation to the reader, or a turn of the inside\exit lever. It is normal for the sync process to take several seconds to begin and to require a couple of tries, on occasion.

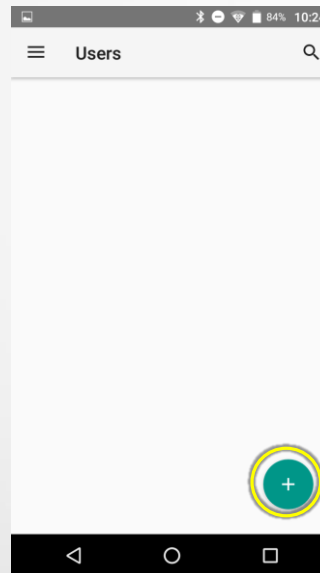


Add a User (Credential Holder) – 1

Clicking the Menu  button from anywhere in LoxIQ brings up the Main Menu screen. Click on “Users” to add or edit them.



All the Users (Credential Holders) assigned to this Organization are shown here. Click the “+” to add a User (Credential Holder).



Go to the Quick Start Guide on page 4 of this manual for a review of each of the Menu items.



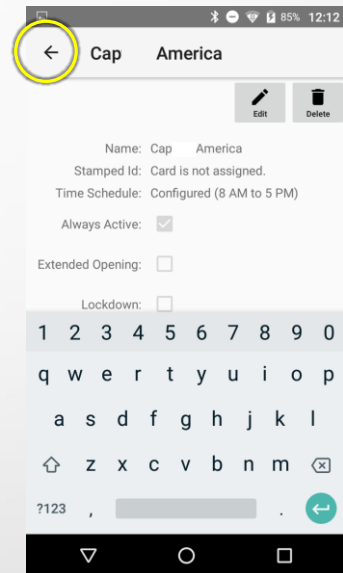
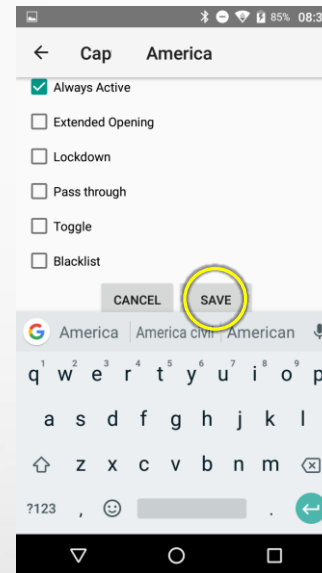
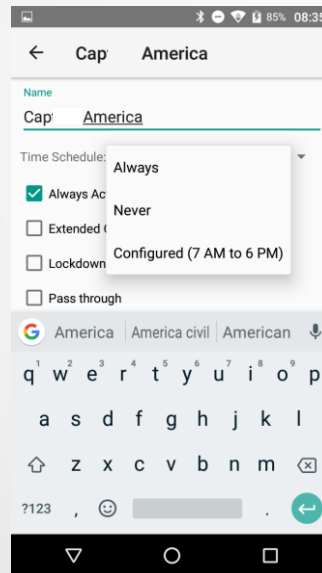
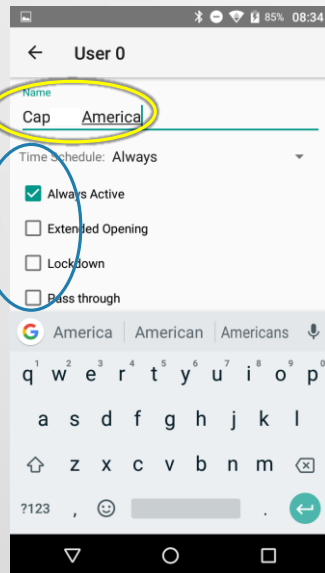
Add a User (Credential Holder) - 2

The new User screen opens, defaulting with a name "User 0". Type in the new name.

Select a Time Schedule for the card to be active. The only selections are Always, Never and one (1) that can be custom created.

Select additional attributes for this credential and click "Save".

All credentials default to having access to the "All Doors" Door Group. The Edit screen for the new User appears. Click "Edit" to do so. Click the back arrow to return to the Users menu to edit others.



For individuals requiring additional time to go through a door, check the "Extended" box.

"Lockdown" cards should be separate from normal cards, to prevent accidents. Each door swipe will either Lock Down or release a door from Lock Down.

"Pass through" cards provide entry into Locked Down doors.

"Toggle" alternatively leaves Open or Locks a door (as long as it is enabled to allow Toggling), performing a similar function as a thumb-turn on a mechanical lock.

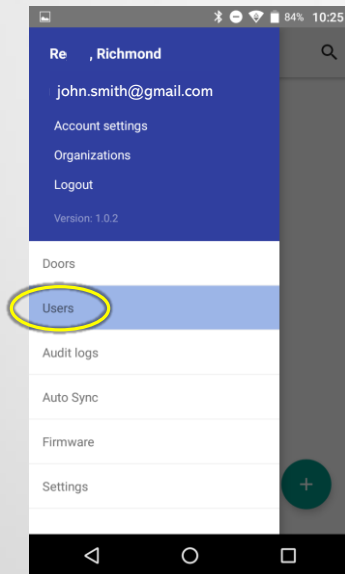
The default Time Schedule is "Always": A custom Time Schedule can be created in the "Settings" menu.

Checking "Blacklist" prevents a card from working at any door. Either the card or door can be updated to enforce this.

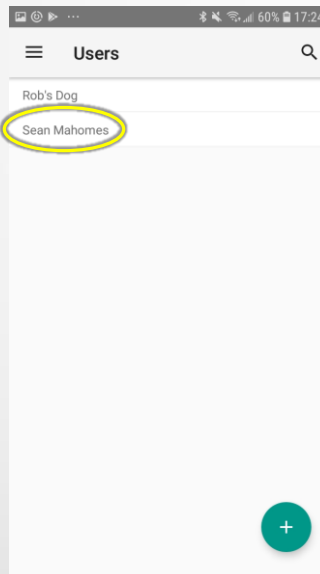


Editing Door Access for Users (Credential Holders)

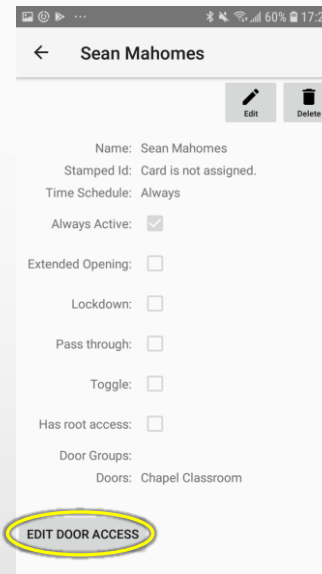
From the Main menu, click on "Users".



Select the User (Credential Holder) to edit.

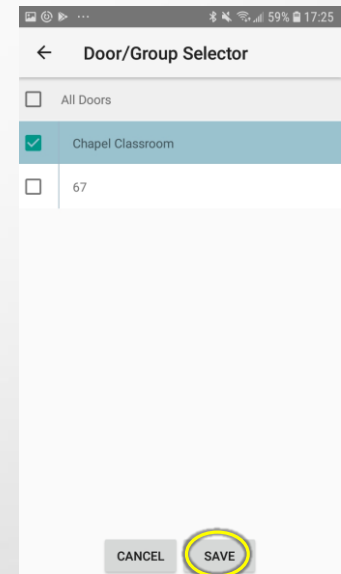


To make basic edits, click "Edit". To add or edit the Doors this user has access to, click "Edit Door Access".



Check the boxes of all the Doors and Door Groups for this user to access.

If Doors have not yet been added, proceed to the "Doors" menu to do so. Click "Save" or the back arrow.



Note: Each time LoxIQ™ is opened, it will start on the page it was on when it was closed.

Note: "All Doors" is the built-in selection for new Users, so no data entry is required, if this is acceptable. So, as more doors are added, the card does not need to be updated.



Programming \ Encoding Credentials - 1

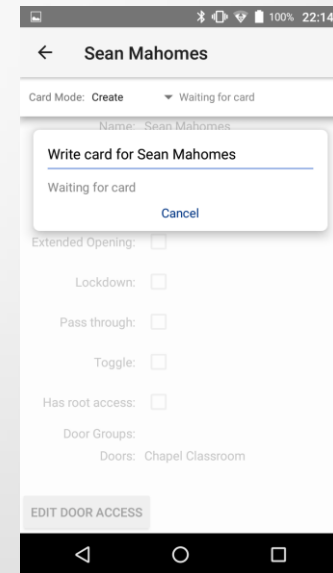
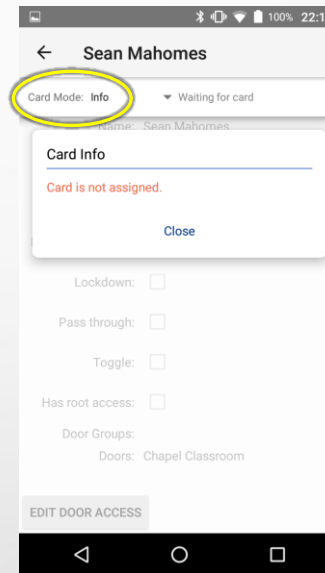
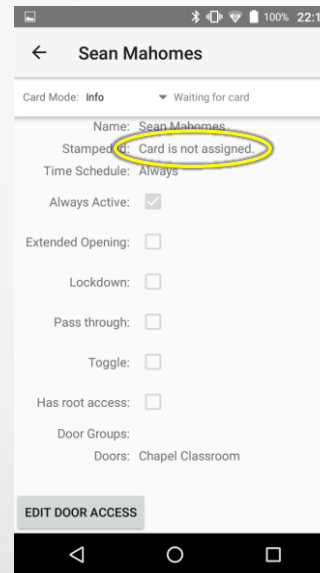
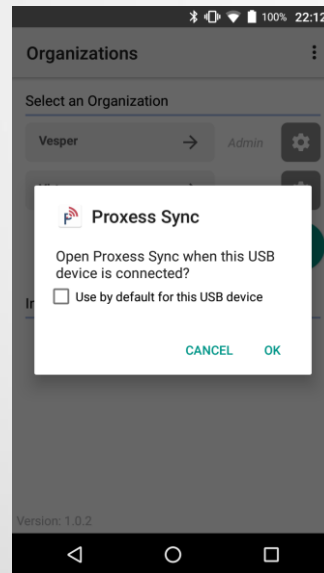
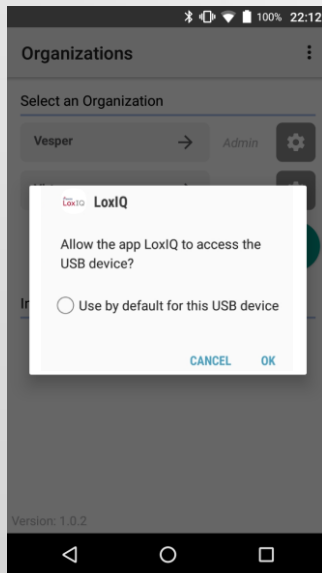
In any screen, plug the Proxess Enrollment Reader into the USB\ Power port of your phone or tablet. Click "OK". Keep the credentials at least 6" away.

If you have another Proxess tool installed (ProxessSync), please click "Cancel" if the below screen is displayed. The reader will still work when you open that app.

Go to the "User" menu and select the User's credential you want to program (or update or wipe). It now shows that it has no programmed card.

The Card Mode is now "Info", so place any card on the reader and, if it has not been assigned, the following appears.

Click on the "Card Mode" tab and select "Create". The following note appears. **Do Not** click Cancel at this time.



Note: When the Enrollment Reader is plugged into the phone\tablet, no other data entry can be performed. Remove the reader to continue programming.



Programming \ Encoding Credentials - 2

Place and leave the card on the reader for ~2-3 seconds, until it beeps and the card is programmed. Remove the card from the reader.

The credential record now shows the card that has been assigned to the user.

As a test, you may change the "Card Mode" back to "Info" and place the card back on the reader. This note verifies what is in the User's record. Click "Close".

To program more cards, anytime the Enrollment Reader is plugged in, change "Card Mode" back to "Info" and place the card back on the reader. This note verifies what is in the User's record. Click "Close". A list of all the Users that have been added, but which do not have cards yet, appear. Select one to continue programming.

The four screenshots show the user profile for Sean Mahomes with the following changes across the steps:

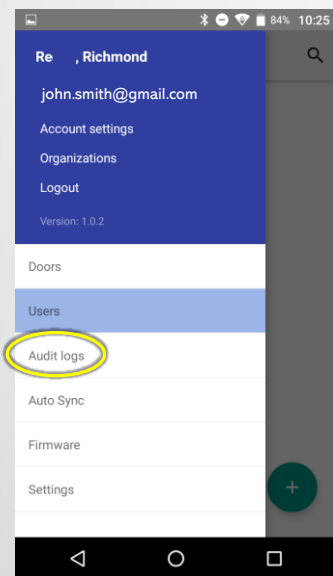
- Screenshot 1:** Card Mode is set to **Create**. A modal titled "Write card for Sean Mahomes" is displayed with a "Waiting for card" message and a "Cancel" button.
- Screenshot 2:** Card Mode is set to **Create**. The user's credential record is shown with details: Name: Sean Mahomes, Stamped Id: 0000000000071675, Time Schedule: Always, Always Active: ☒, Extended Opening: ☐, Lockdown: ☐, Pass through: ☐, Toggle: ☐, Has root access: ☐, Door Groups: Chapel Classroom.
- Screenshot 3:** Card Mode is changed to **Info**. A modal titled "Card Info" is displayed with details: Username: Sean Mahomes, Stamped Id: 0000000000071675, Blacklisted: False, Notes: (empty), and a "Close" button.
- Screenshot 4:** Card Mode is changed back to **Create**. A modal titled "Select a User to Write" is displayed with "Rob's Dog" selected.

Unplug the enrollment reader and then click the back arrow.

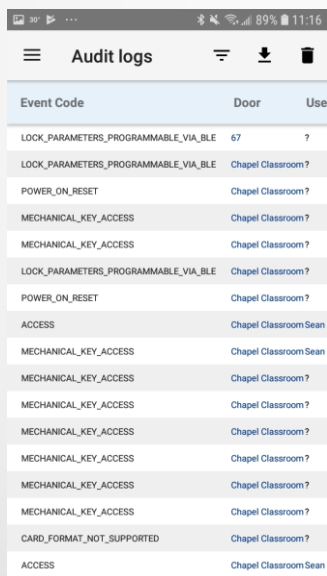


Audit (Event) Logs

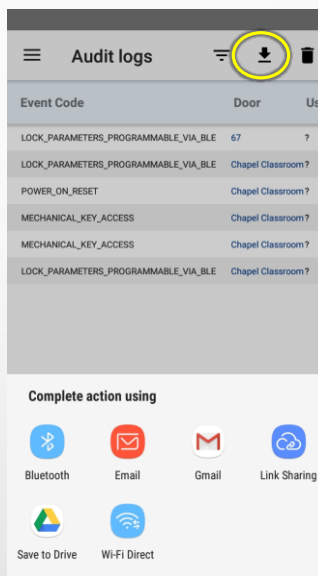
From the Main menu, click on “Audit Logs” to review the access and system events.



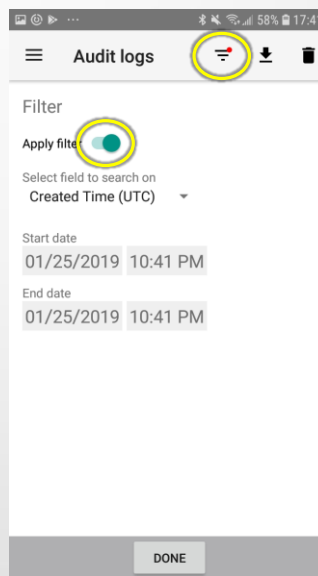
All the system events are listed – the most recent first – and can be scrolled through.



To share or download the transaction\audit files, click the circled icon and then choose the method below.



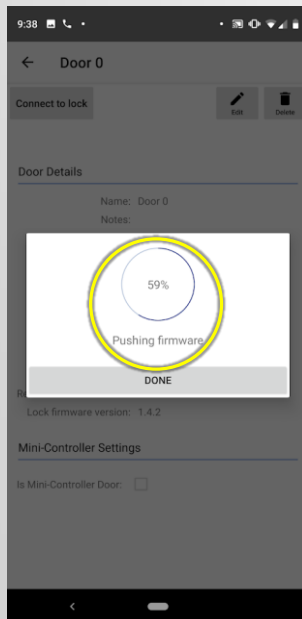
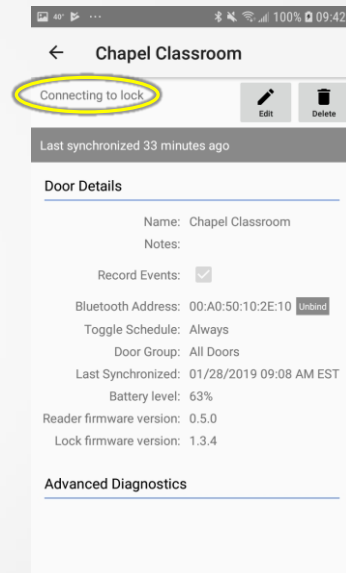
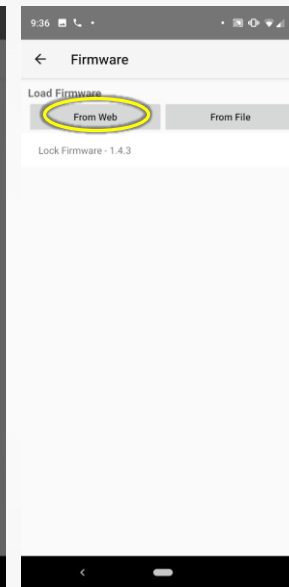
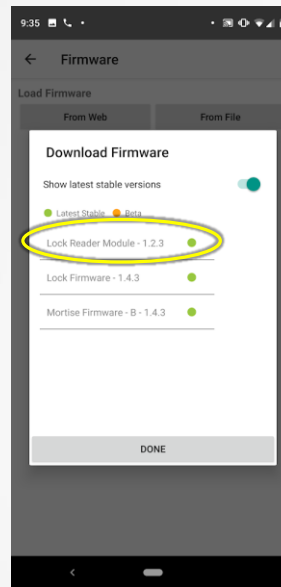
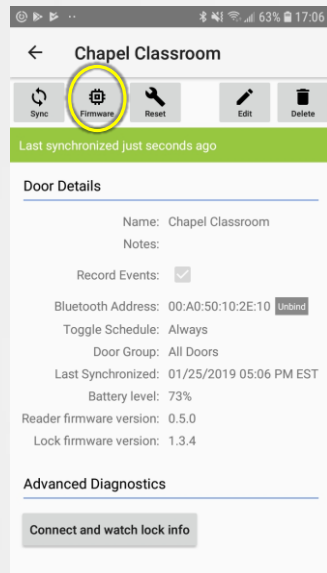
To sort or filter the transactions, click the circled icon and then the “Apply Filter” switch. Select the time frame to narrow the search by.



Note: Lock and card transactions are logged when a door is sync'd and when a card is placed onto an enrollment reader.



Updating Firmware on Locks

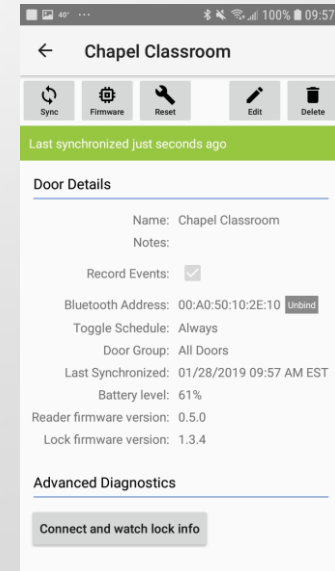


There are three (3) sets of firmware on each lockset, one each for BLE operations on the Interior and Exterior sides of the door and one for the lockset PC board. Predominantly, any feature updates will likely be only for the Interior.

To retrieve the latest versions, use your mobile phone's Internet browser (or your PC browser and email the files to your mobile phone) and go to the Proxess Firmware webpage at www.proxess.com/firmware and click on the link your Proxess support representative suggests. Save each file needed to your mobile phone and note the location. By default, most phones save downloads to the "Download" folder. From the **Main Menu**, click on "**Doors**" and then onto the **door** you wish to update. Loading will be performed by clicking on the highlighted "Firmware" icon. The Firmware page will open and if there is nothing listed, click on "Load Firmware" and then click on the firmware item to load. The screen will show the connection and loading process, from 1-100%.

Next, wait several seconds for the lock to go through a series of red and green led blinks and then for the sound of the motor restarting and a brief solid green LED. Only a Construction Card will work now.

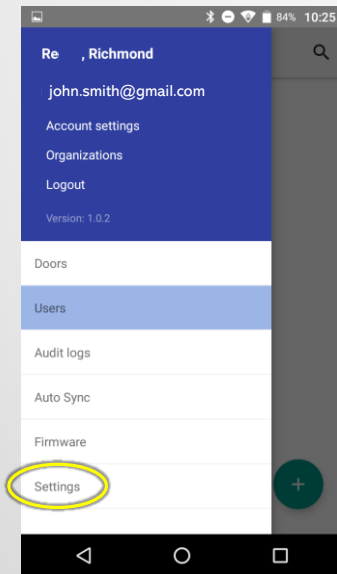
Finally, click on "Sync" at the top of the Door screen re-marry the software and lock data again. The screen on the right will appear and now all previous cards will function as programmed.



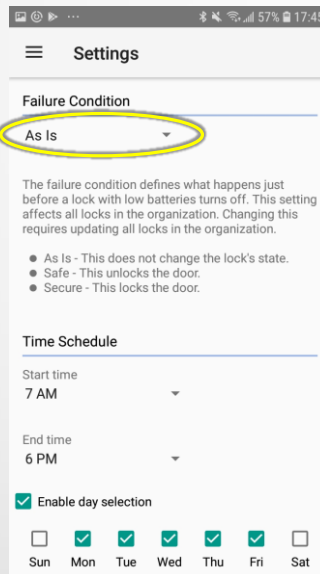


Settings – Failure Condition

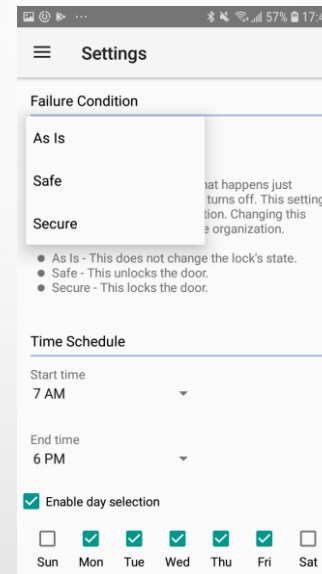
From the Main menu, click on "Settings".



Click on the "As-is" bar.



Select the mode that the lock will fail in, should, for instance, the batteries were to fail: As-is, Safe or Secure.





Settings – Custom Time & Toggle Schedule

To configure the (one) custom Time Schedule, which can be applied to each User's door access (in addition to the built-in Always & Never schedules), click on each the Start and End time bars.

Settings

before a lock with low batteries turns off. This setting affects all locks in the organization. Changing this requires updating all locks in the organization.

- As Is - This does not change the lock's state.
- Safe - This unlocks the door.
- Secure - This locks the door.

Time Schedule

Start time
7 AM

End time
6 PM

☒ Enable day selection

☐ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☐ Sat

This configurable time schedule only affects users which have it set. The user default is to always allow access.

Be sure to update cards for users who have this time schedule after making changes.

Select the Start Time desired.

Settings

before a lock with low batteries turns off. This setting affects all locks in the organization. Changing this requires updating all locks in the organization.

- As Is - This does not change the lock's state.
- Safe - This unlocks the door.
- Secure - This locks the door.

Time Schedule

Start time

7 AM

8 AM

9 AM

10 AM

11 AM

12 PM

1 PM

2 PM

☒ Enable day selection

☐ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☐ Sat

This configurable time schedule only affects users which have it set. The user default is to always allow access.

Be sure to update cards for users who have this time schedule after making changes.

Select the End Time desired.

Settings

☒ Enable day selection

☐ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☐ Sat

This configurable time schedule only affects users which have it set. The user default is to always allow access.

Be sure to update cards for users who have this time schedule after making changes.

Time Schedule

Start time
7 AM

End time

5 PM

6 PM

7 PM

8 PM

9 PM

10 PM

11 PM

12 AM (next day)

1 AM (next day)

☒ Enable day selection

☐ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☐ Sat

This configurable time schedule only affects users which have it set. The user default is to always allow access.

Be sure to update cards for users who have this time schedule after making changes.

Select the (one) custom Toggle Schedule that can be applied to each Door (in addition to the built-in Always & Never schedules) in the same way as you set the custom Time Schedule.

Settings

Ringtone

This configurable time schedule only affects users which have it set. The user default is to always allow access.

Be sure to update cards for users who have this time schedule after making changes.

Toggle Schedule

Start time
8 AM

End time
5 PM

☐ Enable day selection

This configurable toggle schedule only affects doors which have it set. The door default is to always allow toggle. A User must also have the toggle privilege checked.

Doors that have been toggled unlocked will lock when the toggle schedule ends.

Be sure to synchronize with the doors that have this toggle schedule after making changes.