SOFTWARE MANUAL

ProxessIQ™ Software & Proxess Sync™ Mobile App Configuration

Equipment & Operation: Start-up Guide

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

Here are the minimum required components:
- Computer (for each ProxessIQ™ server and client), with Windows 10+ and USB input
- ProxessIQ™ software Download link
- USB Enrollment Reader
- Android Smart Phone
- Proxess Sync™ Download link
- Network or Internet connection for the PC, depending on the Proxess Sync™ connection method
- Common WiFi connection to ProxessIQ™, or mobile phone plan with connection to the ProxessIQ™ network
- 1 or more LoxIQ™ locksets (batteries are Not included)
- 4 x standard AA batteries per LoxIQ™
- Screwdriver to install LoxIQ™ in cylindrical door prep, or also drill ¼" hole for mortise lockset
- Proxess smart credentials (cards, stickers, fobs)

Here is the basic operational sequence:
- Unzip and install the ProxessIQ™ download link
- Connect the USB Enrollment Reader to the computer
- Download the Proxess Sync™ link and ensure the computer and smart phone are on the same WiFi network. If using Proxess Sync™ remotely, the remote connection will be tested in a subsequent step.
- In ProxessIQ™, add a door, time zone, access level and mobile device
- Open Proxess Sync™ and scan the QR code that appears. Code can be copied and emailed to the Proxess Sync™ holder
- Test the mobile\WiFi connection
- In Proxess Sync™ App, click "Sync with ACS"
- Click "Auto Sync Doors" and hold phone next to the LoxIQ™
- Place credential on the Enrollment Reader and enter basic information
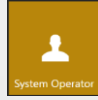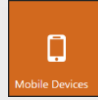- Swipe card on LoxIQ™

Quick Start Guide

- **Software Installation:** Install ProxessIQ™ software from http://www.proxess.com/Data-Sheets/Download
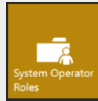
- **System Operator Roles:** Define the grouping for view\edit\delete rights for each software module.
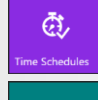
- **System Operators:** Add operators into an Operator Role. Modify\personalize their role.

- **Mobile Devices:** Add mobile phones which will operate the Proxess Sync simple configuration App.

- **Proxess Sync™:** Sign in and enable the Proxess Sync™ simple configuration App on your Android Mobile Phone.

- **Time Schedules:** Create the days and times that locks and doors will operate with credentials and remain locked or unlocked.
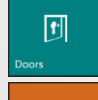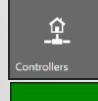
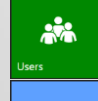- **Doors:** Add LoxIQ™ wireless locksets into the system.
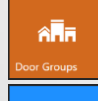
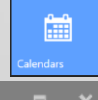- **Door Groups:** Create groups of Doors, for more easily assigning access rights to users.
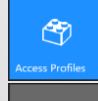
- **Access Profiles:** Create groupings combining Time Schedules with Doors and Door Groups.

- **Controllers:** Define online\checkpoint doors\readers.

- **Users:** Add\Modify\Delete credential holders and their credentials.

- **Calendars:** Schedule Holidays and special events, years in advance.

- **User Interface:** Arrange and hide Module icons and UI color schemes.

- **Settings:** Define system and operational attributes, including for door, reader, LED and credential operations.

SOFTWARE DOWNLOAD & INSTALLATION

Which software do I download for a Basic system?

From the links provided at www.Proxess.com/Downloads if your system is described on this page, then on the computer that will be your primary (the "server") you will download and install "**Proxess-Server-Installer-LocalDB-Bundle.exe"**. On all other computers (unlimited), you will only install "**Proxess-Installer-Client.msi"**

Follow the instructions in this section if this describes your system.

There will be only 1 (one) computer (laptop or desktop) used for configuration and data entry.

OR

There is 1 (one) main computer (laptop or desktop) used for data entry and one (1) or more additional computers may be used for configuration and data entry, either now or in the future.

Primary computer ("Server"):
Install "**Proxess-Server-Installer-LocalDB-Bundle.exe"**

Additional computers ("Clients"):
Install "**Proxess-Installer-Client.msi"**

Locate the download link provided at www.Proxess.com/Downloads or which has been emailed or otherwise provided to you by the Proxess Support staff or Sales team. For a system that will use the Proxess built-in "LocalDB" database (a Microsoft database product), you will install the file "Proxess-Server-Installer-LocalDB-Bundle.exe" (can only be installed on one computer per system). Double-click on "**Proxess-Server-Installer-LocalDB-Bundle.exe"** and then click on "Download" on the screen that opens.
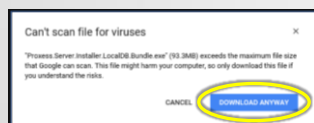
Follow the windows that open and prompts that appear on this page. Depending on your computer's settings, some of these windows may not appear and can be ignored.
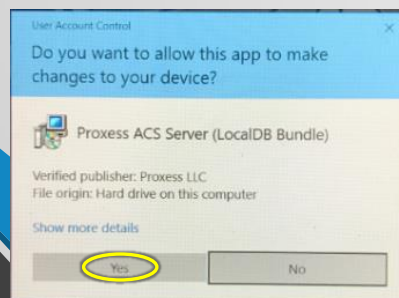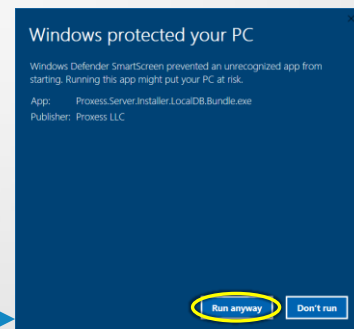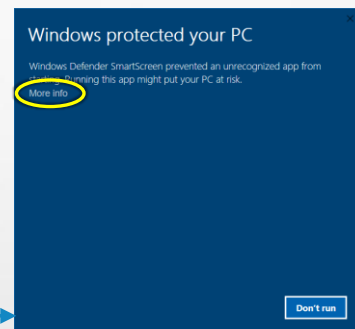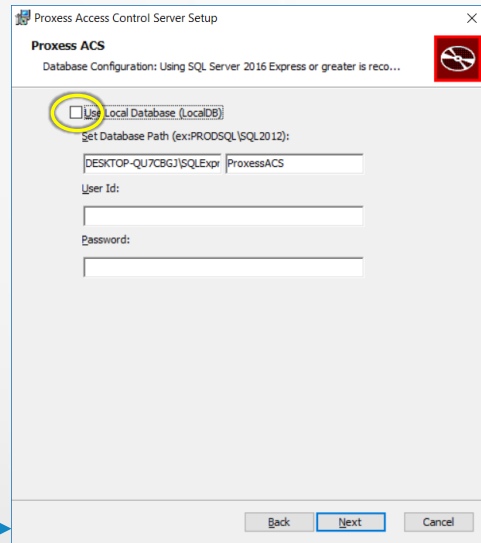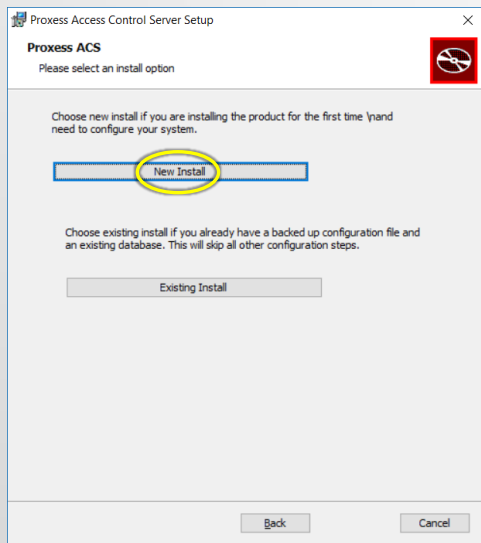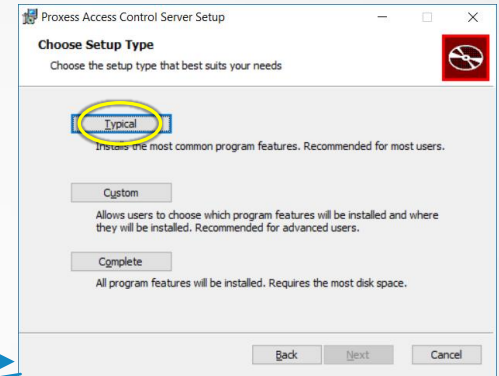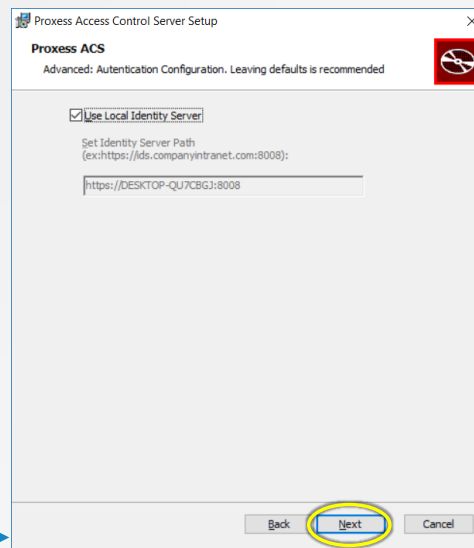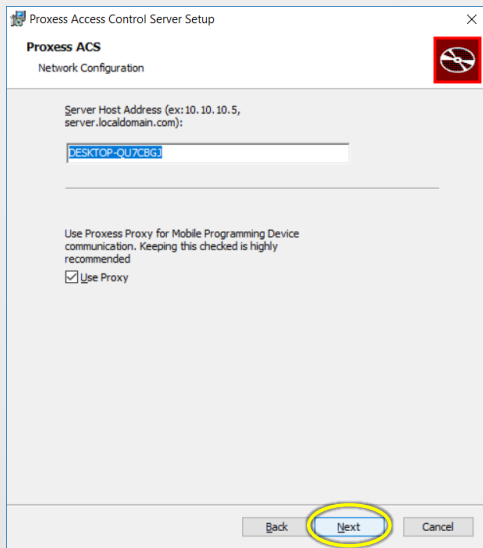
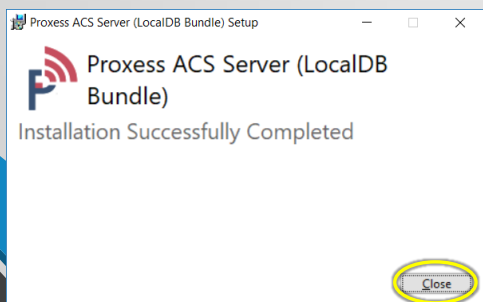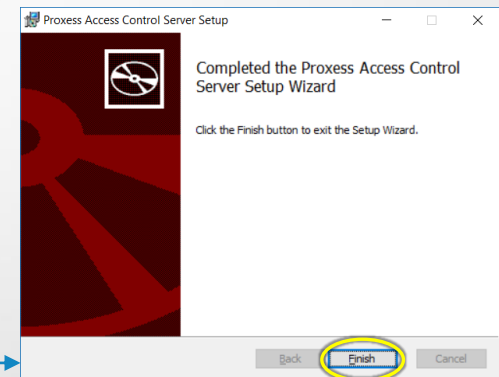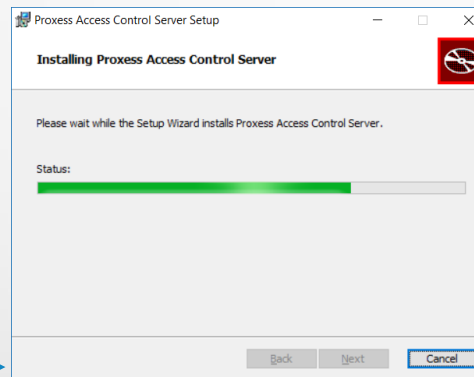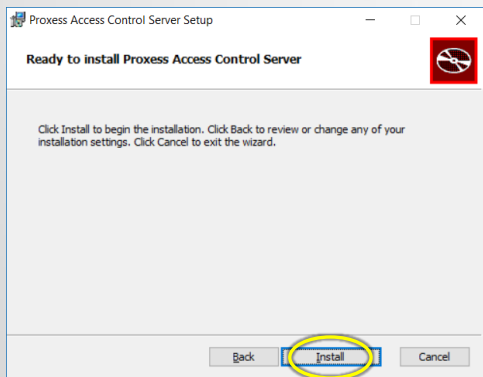The icon below may blink in your computer's taskbar. If so, click on it to proceed.
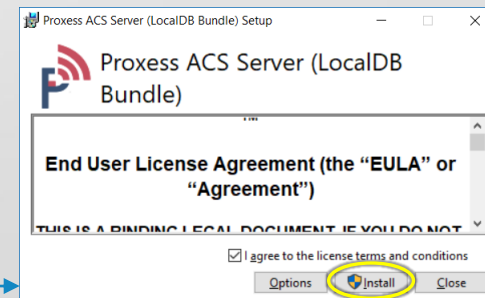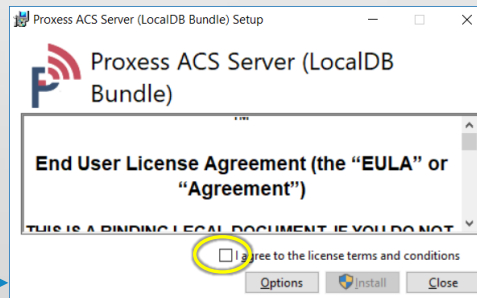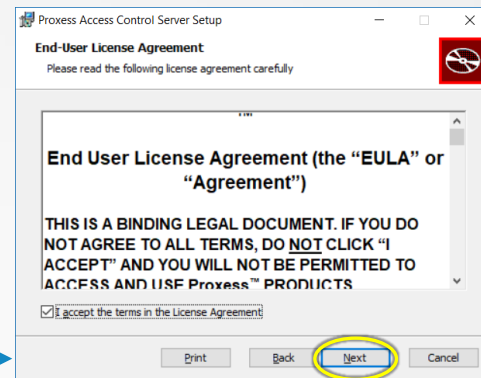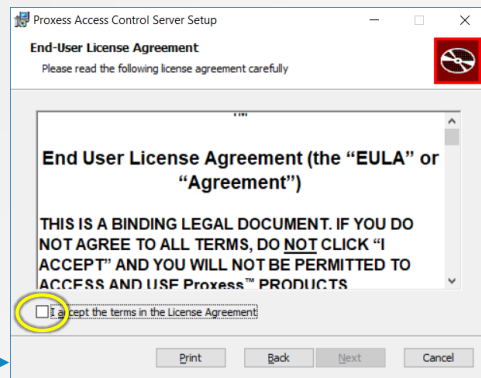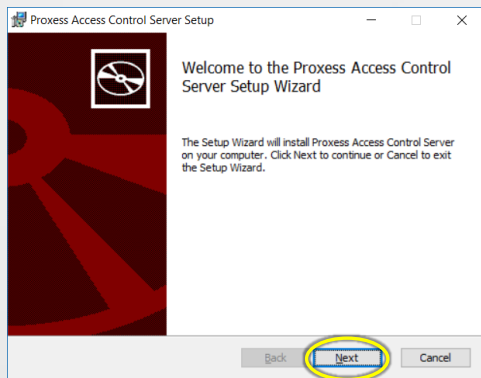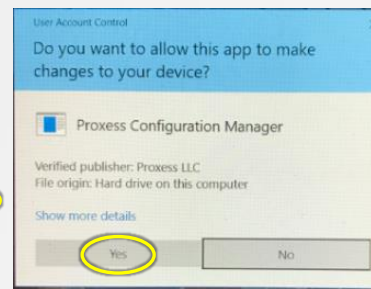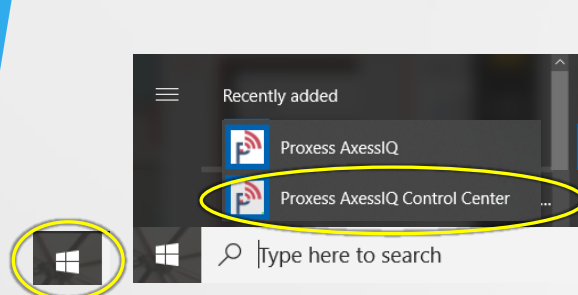
Continue following the windows that open and the prompts that appear on this page.
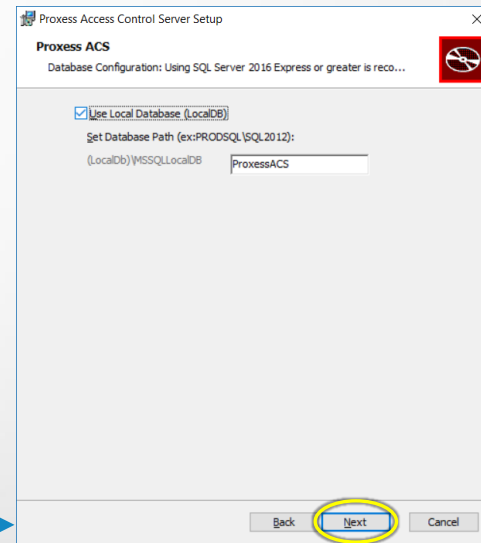
Continue following the windows that open and the prompts that appear on this page.

Both the "Server" and "Client" portions of the software have now been installed on your computer.

It is good practice to follow the steps on this page, which will assure that the essential Server services are running on this computer.

Press the Windows™ icon on the keyboard or click on the Windows™ icon on the left side of the Taskbar on the bottom of your screen. Locate and click on the "Proxess ProxessIQ Control Center", which will be in both the "Recently Added" section of the pop-up list of programs, as well as under the "P" section down below. If prompted with the window requesting to make changes to your computer, click "Yes".
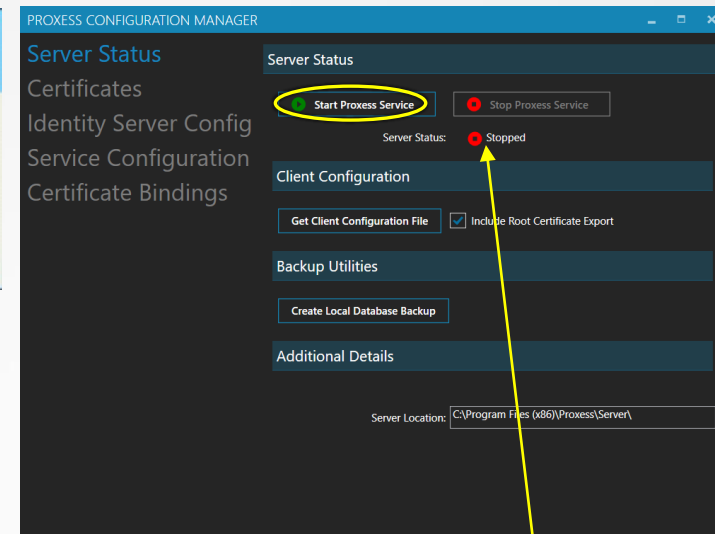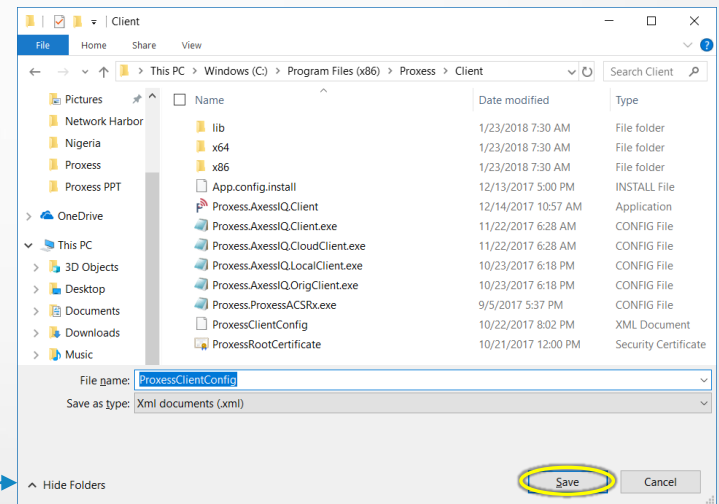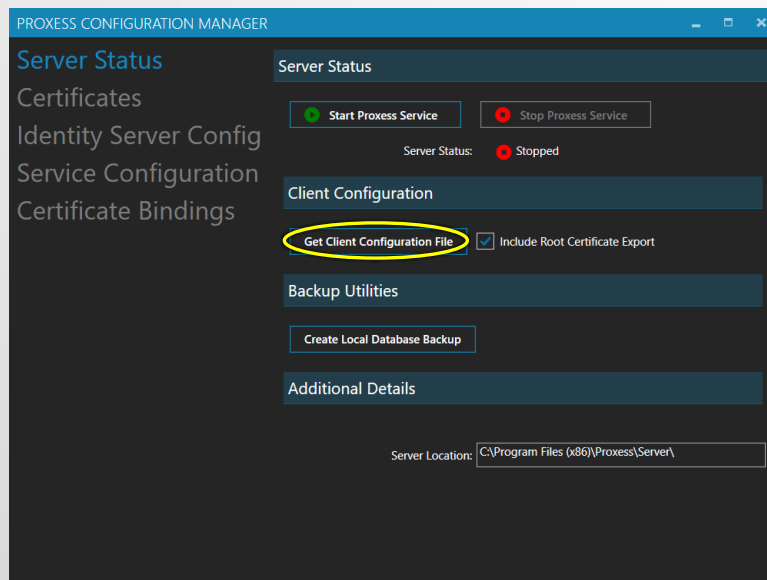
The above screen will open. If the Server Status is shown as "Stopped" then click on "Start Proxess Services". If it is shown as "Running" then you may close this program window.
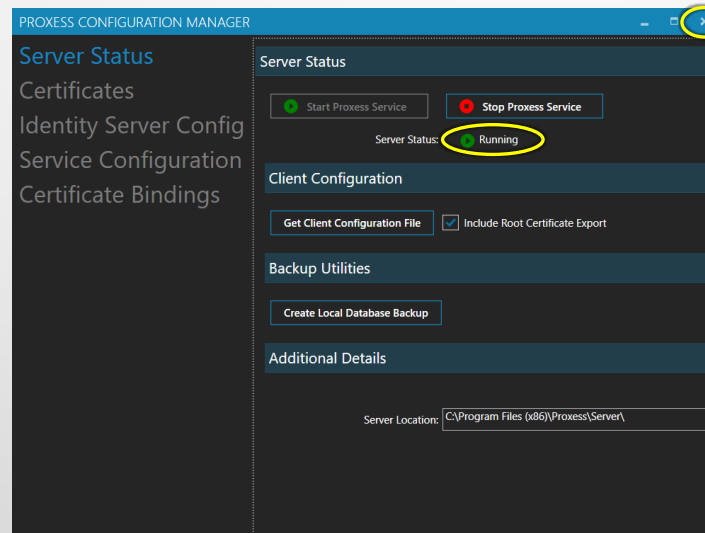
Usually within several seconds (and upwards of about a minute) after clicking "Start Proxess Services" the Server Status will change to "Running".

We will now proceed to initiate the software.

Click the "Get Client Configuration File" button.
On the "Save As" screen, navigate to the following (preferable) folder location to save the file in:
"This PC \ Windows (C) \ Program Files (x86) \ Proxess \ Client".
Click the "Save" button.
Click on the "x" on the top right of the Proxess Configuration Manager window to close the application.
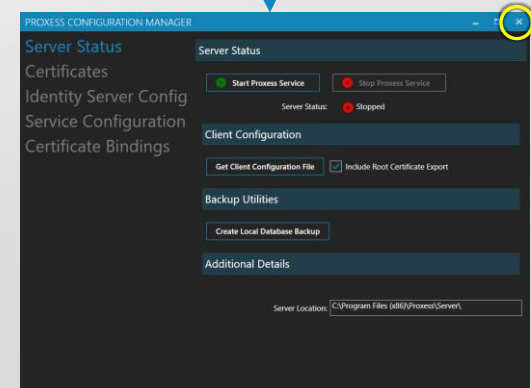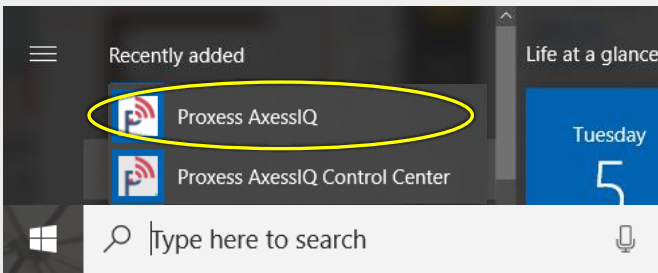
Click the "Windows" icon on your computer and select the "Process ProxessIQ" program and allow the app to make changes to your device.
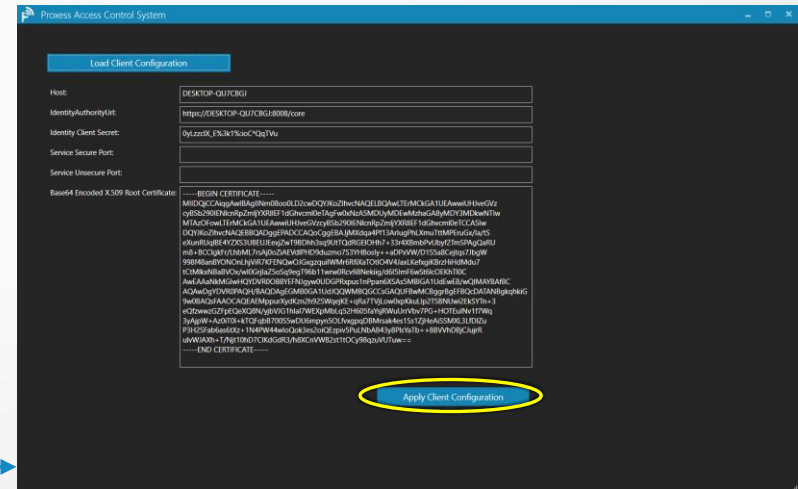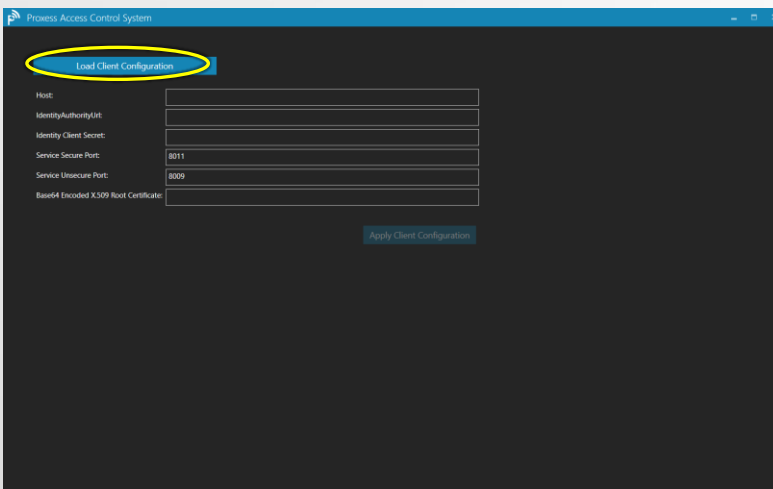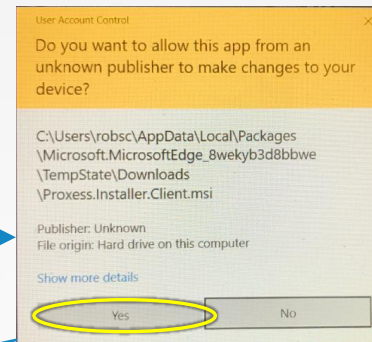

NOTE: Other than as stated here, do not make any changes to these screens. Click the "Load Client Configuration" button on the first screen. You may be asked to search for the Configuration file, which may be found in the file you saved it in (shown below). Click on it. On the next screen, click the "Apply Client Configuration" button. The Login screen will open. Enter "administrator" and "proxess".
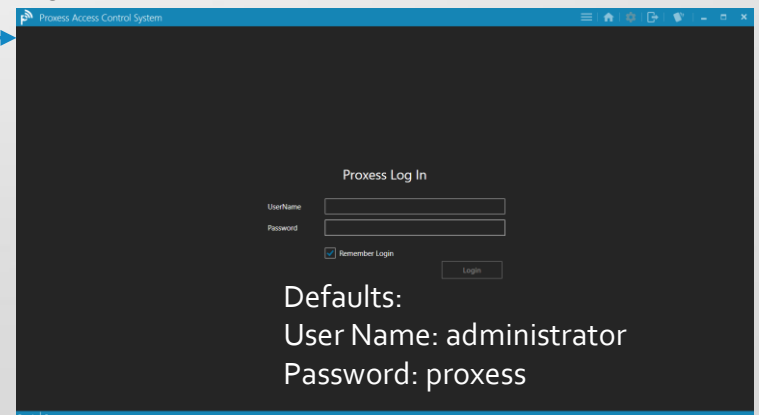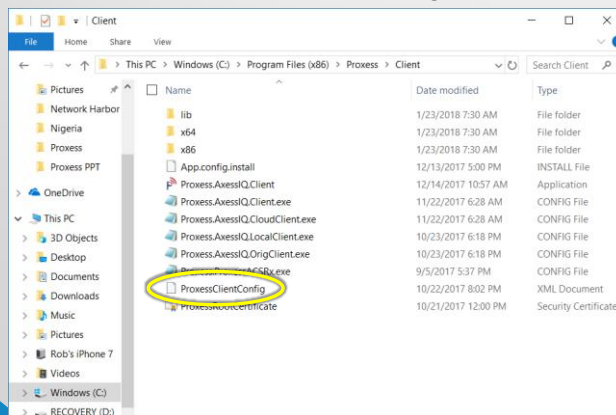
Defaults:
User Name: administrator
Password: proxess

You will now be prompted to change your password, which is strongly recommended, but not required. The ProxessIQ™ software will now open.
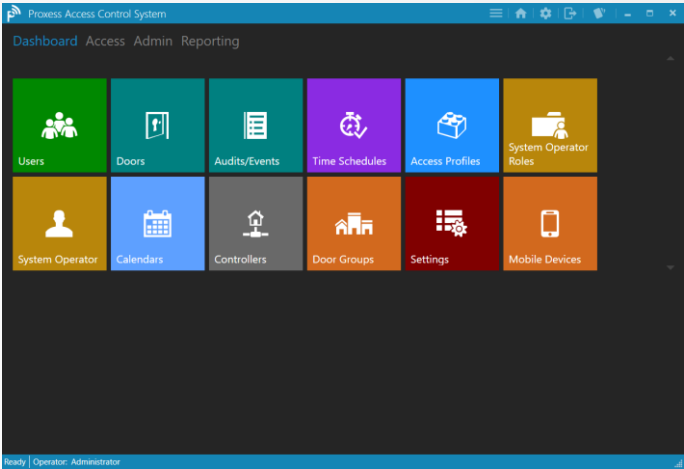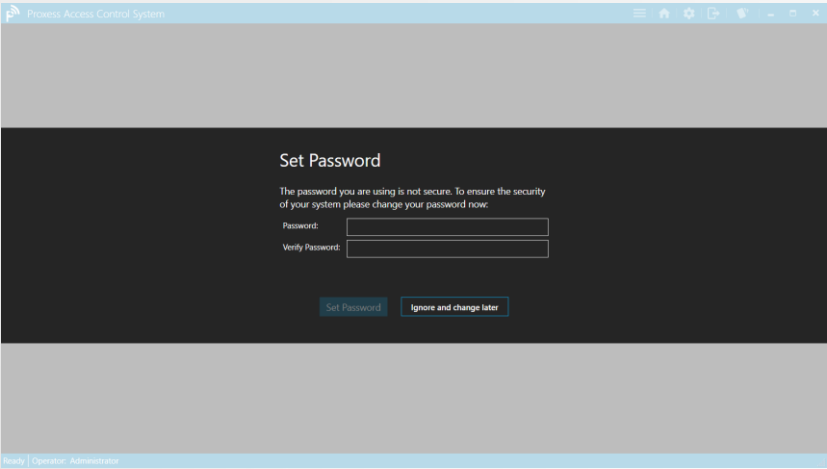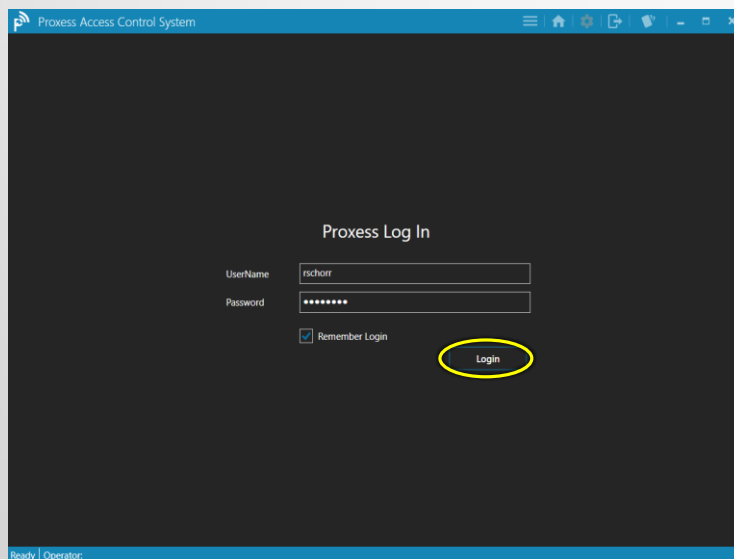
Begin Programming ProxessIQ™

NOTE: The programming sequence from the previous page will be the order followed throughout this operators manual. Each module has dependencies on the previous modules, so attempting to configure a system out of this order will result in the need to go back to the prescribed order to fill in various missing data entry fields.
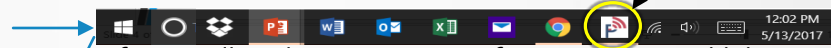
Computer Desktop & Task Bar

Click on the ProxessIQ™ download link provided on the www.Proxess.com website or emailed to you by Proxess Support staff or sales team. Follow the directions to complete the installation on a local or virtual computer.

After installing the ProxessIQ™ software, you may add the icon to your taskbar and\or desktop. Click on one of those icons to start the software and background services. The software should always remain operating, even if it is just in the background.
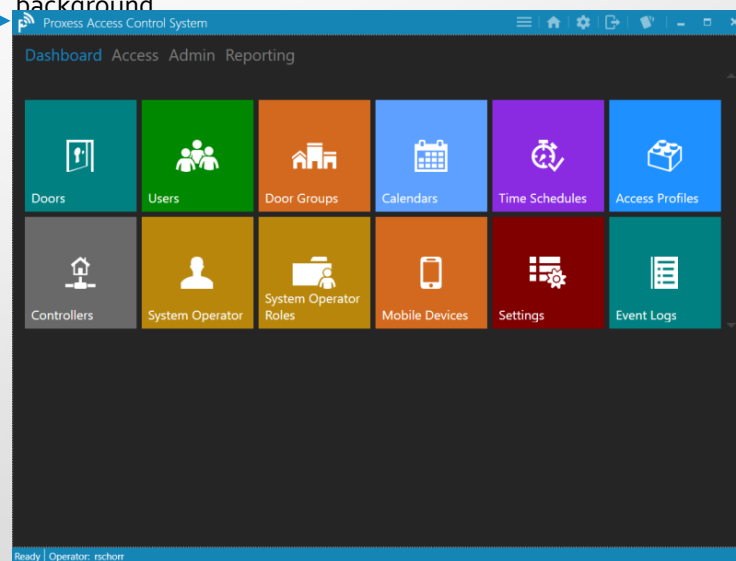
The Login screen will appear after a short background start-up. Enter the default operator credentials you have been given. For security, be sure to immediately delete these credentials and add new personal credentials. Click on Login.
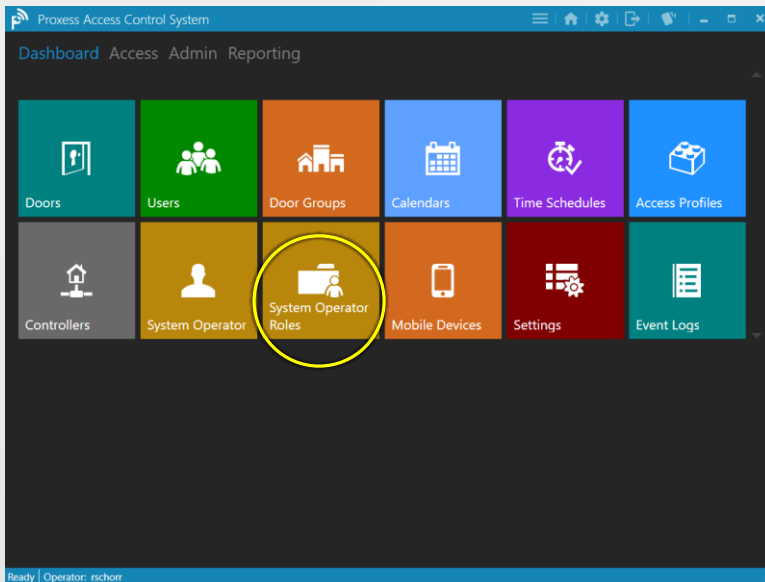
The Dashboard \ Home Screen will appear. In a later section we will show how to add the shortcut menu and change the background and icon colors, order and visibility. Click on the Module (the large icons) you wish to enter.
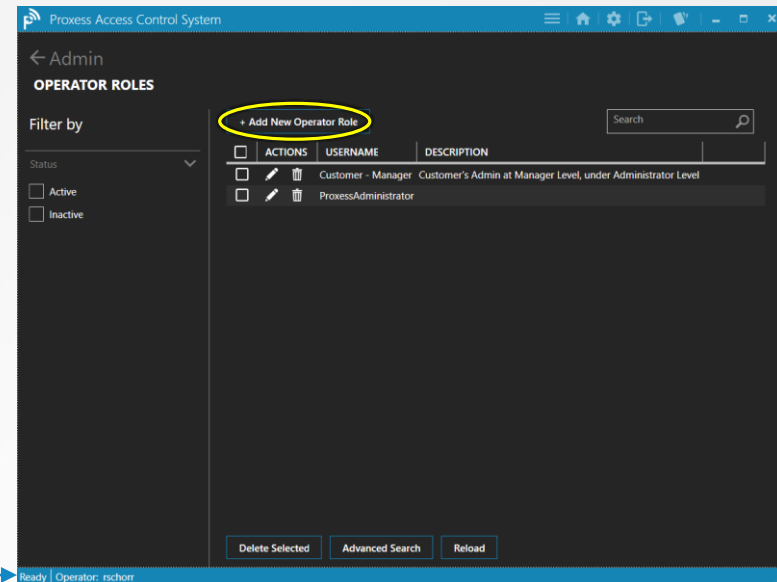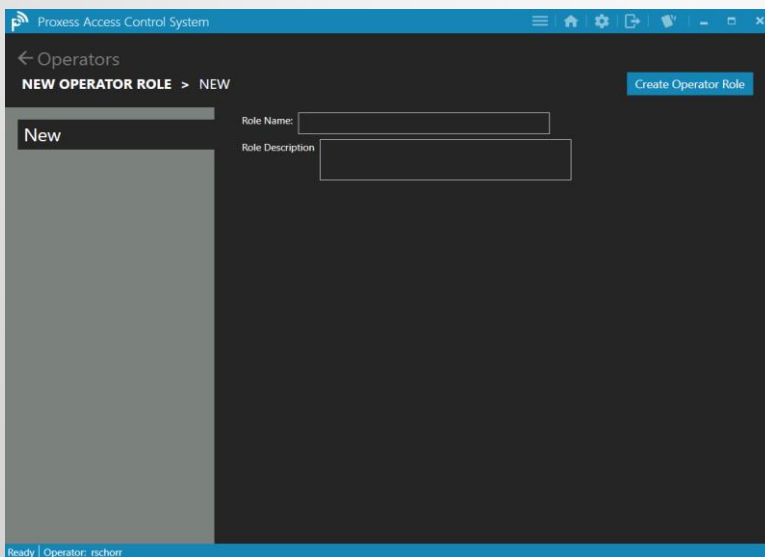
OPERATOR ROLES

Operator Roles define what Modules (the large icons) Operators will have access to and what actions they will be able to perform once in that section. Click "System Operator Roles".

Options on this page allow editing and deleting existing Roles and filtering down a longer list of Roles using the Filter checkboxes for Active and Inactive Roles, on the left side of the page. Click "Add New Operator Role" to do so.

The following screen will open, for creation of the new Operator Role.
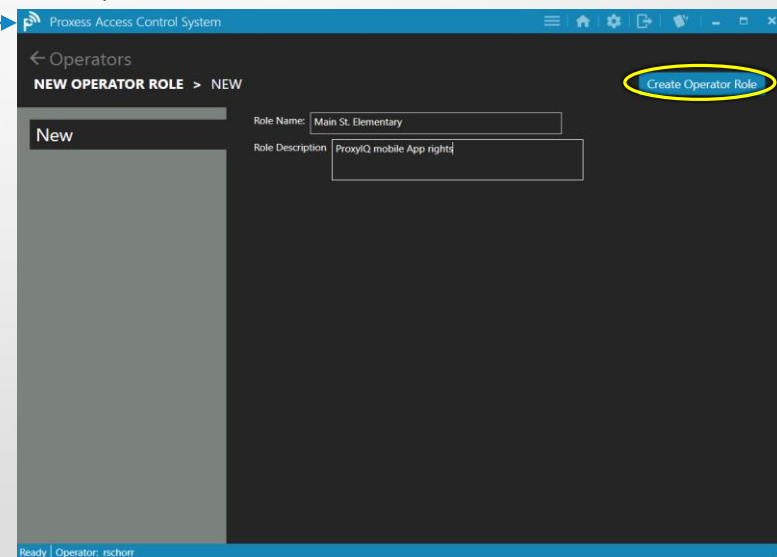
Enter a descriptive name for the Role, considering all the future possible names that may be in your system, to avoid future naming conflicts. You may add any descriptions that may assist you and the team. Click on the Create button when complete.

Once the new Role has been created, click on the Privileges button to define their modules and rights access.

For each of the listed ProxessIQ™ software modules, click the radio button for the rights this Role will have once an Operator with this Role logs in. "Manage" allows editing and "Read" only allows viewing within each module. Click "Save" when complete.

The above screen appears. Click "OK".

*Search for an Operator by typing the first few letters of their name. The resulting list will automatically appear.*

To review or edit any Role, click on the above icon. Other options on this page allow deleting existing Roles and filtering down a longer list of Roles , using the Filter checkboxes, for Active and Inactive Roles, on the left side of the page, or searching by name.
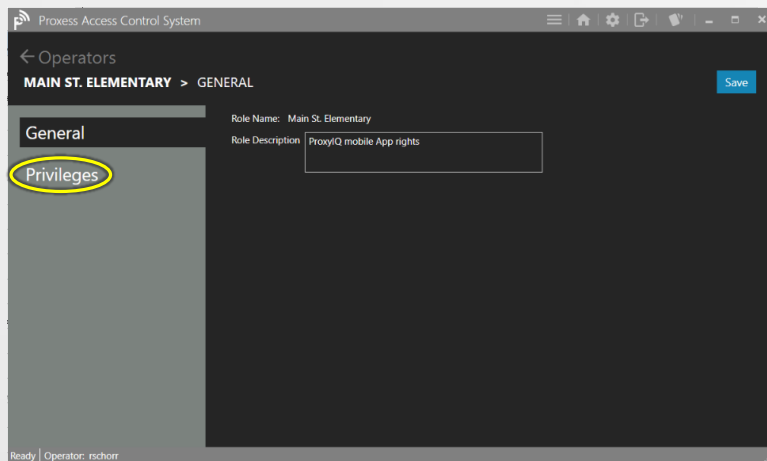
The Role you selected will appear. You may change any notes you wish. Click on the Privileges label to review those rights.
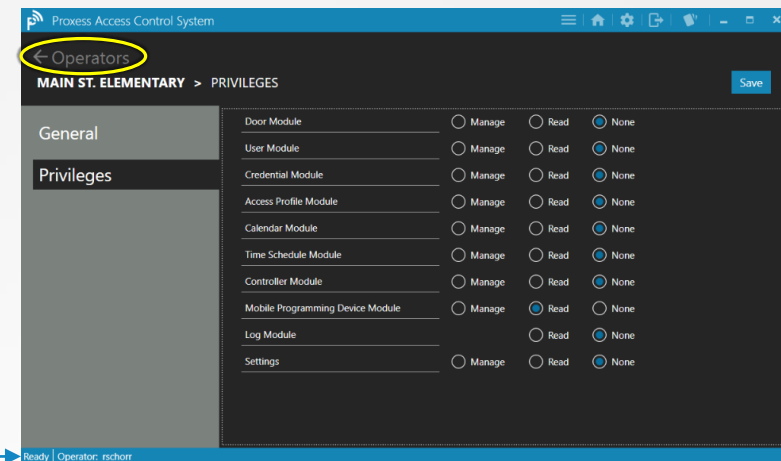
For each of the listed ProxessIQ™ software modules, click the radio button for the rights this Role will have, once an Operator with this Role logs in. "Manage" allows editing and "Read" only allows viewing within each module. Click "Save" when complete and "Operators" to return to the main Operator Roles screen.
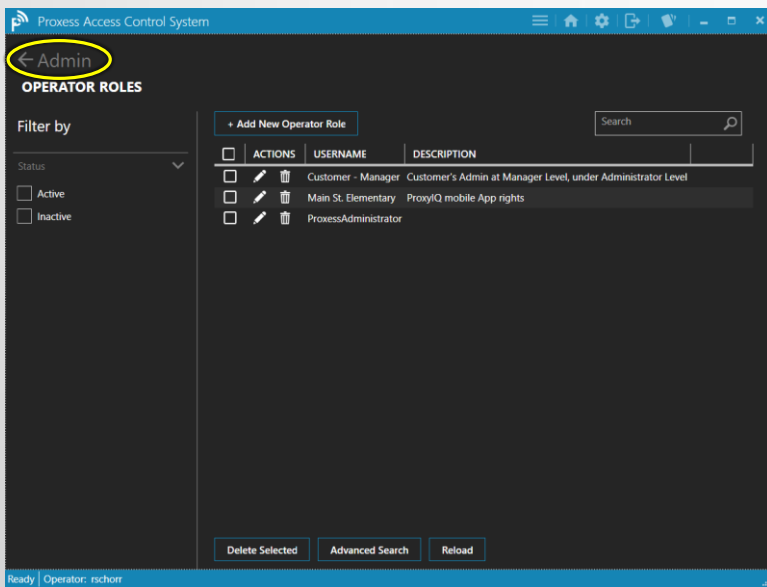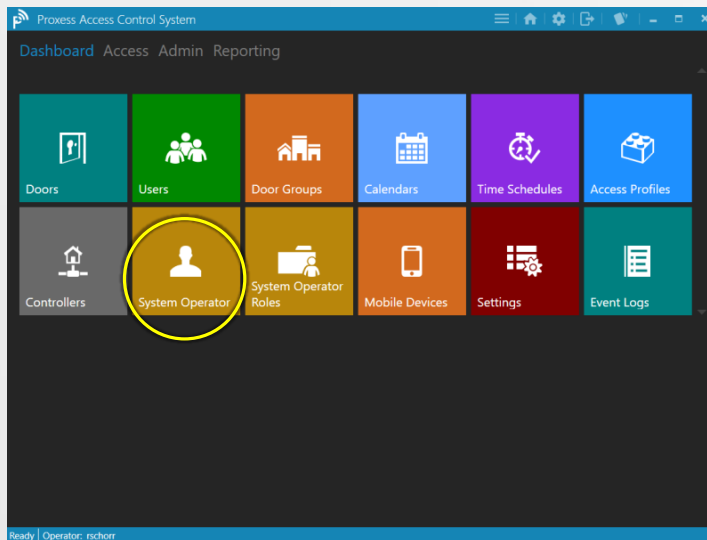

The main Operator Roles screen appears. Click on the "Admin" tag to return to your Home view.
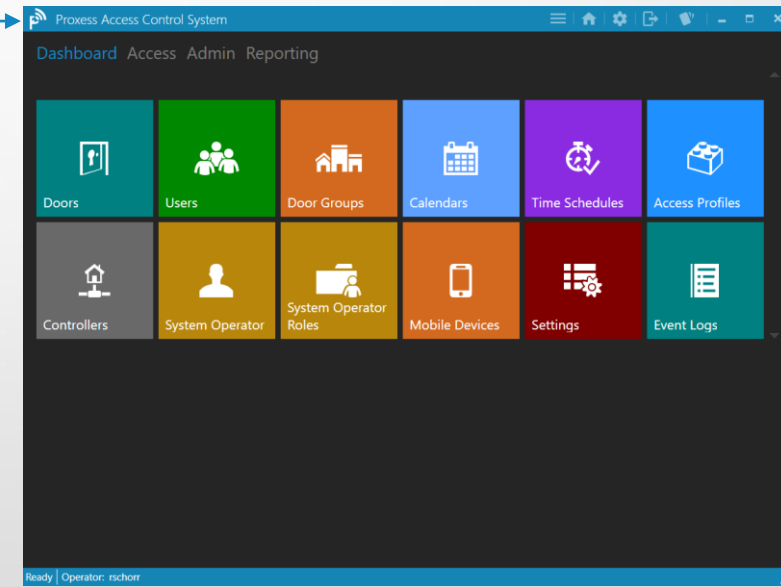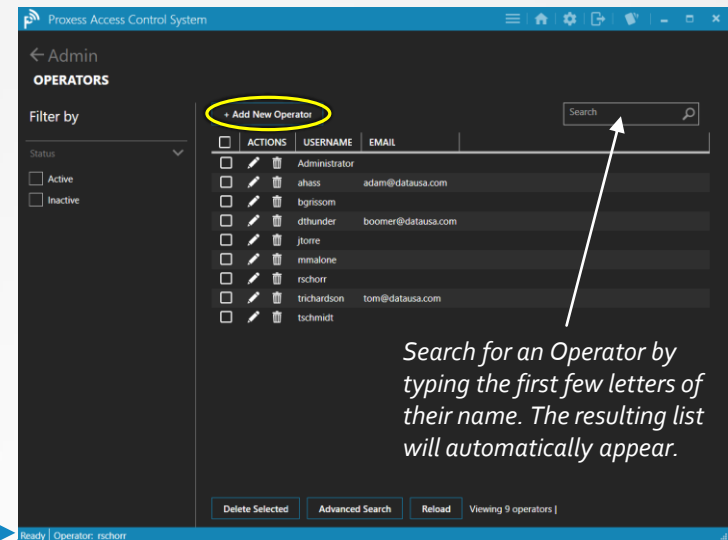


You will be returned to your Home Screen \ Dashboard.

OPERATORS

From the Home Screen (Dashboard) click on the System Operators icon, where you will be able to add and modify individual operators\programmers, including assigning them to one or more Operator Groups.

Search for an Operator by typing the first few letters of their name. The resulting list will automatically appear.

Click on "Add New Operator" to perform this action. Other options on this page allow editing and deleting existing Operators and filtering down a longer list of Operators , using the Filter checkboxes, for Active and Inactive Operators, on the left side of the page. Or, search for a specific Operator by typing the letter you know of the name of that person.
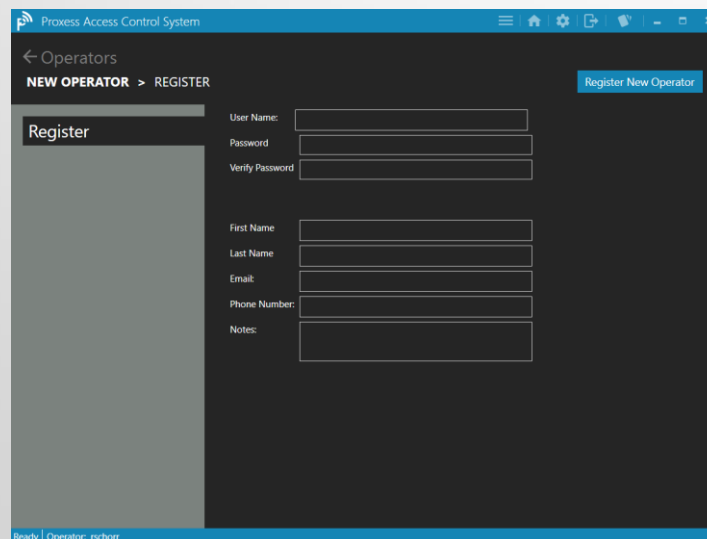
The main New Operator screen appears, showing the mandatory and optional fields. You may click on the "Operators" tag to return to the main Operators list.
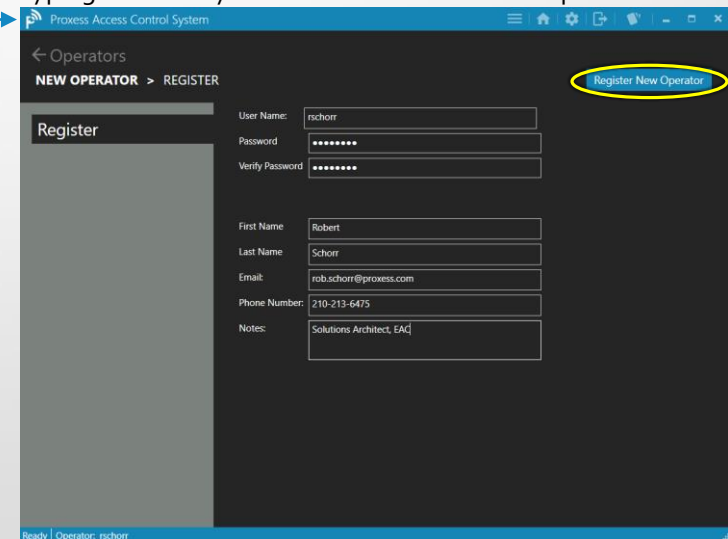
Create a case-sensitive User Name and Password, ensuring to verify the password exactly. No spaces are permitted in these fields. Enter a first and last name and a valid email, for use in later modules. The phone number and notes are optional. Click Register when complete.

The details for the Operator which you have just registered will appear. You may edit these details, including clicking on "Change Password" to do so, or click "Save".

Click on the Roles button to assign this individual to a category of rights within the software.

The existing list of Operator Roles that have been allocated to this Operator is displayed, which may be deleted. To add more Roles, click the dropdown arrow to reveal the full list of Operator Roles.
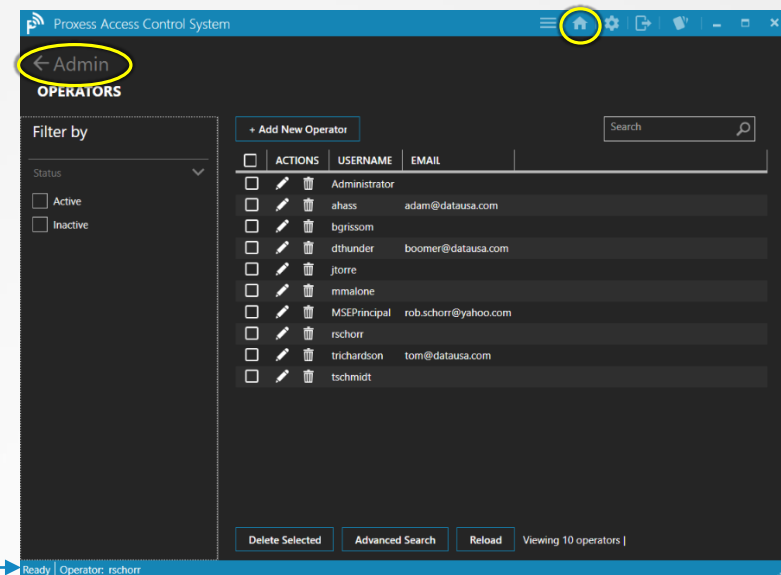

Select an additional or initial Operator Role to apply to this Operator.
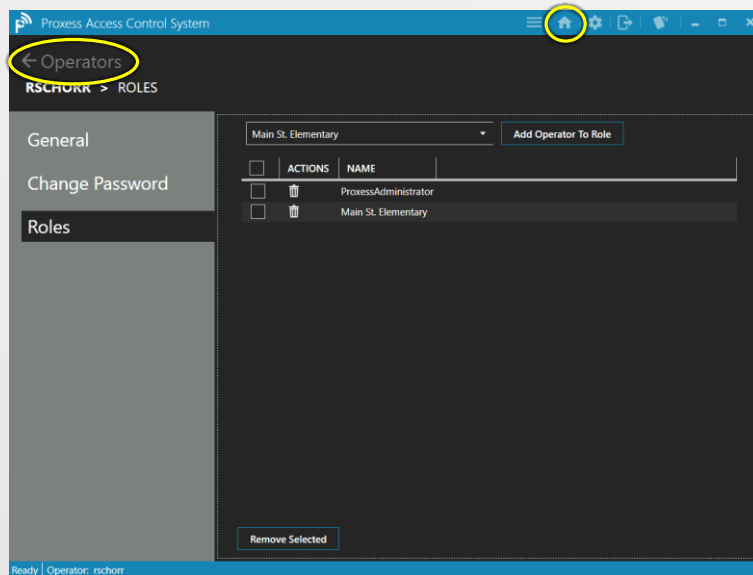
The new Role added to this Operator now appears in the list of previous Roles for the Operator. To return to the Home Screen \ Dashboard, click on the Home icon on the top task bar. To return to the list of Operators page, click on "Operators".
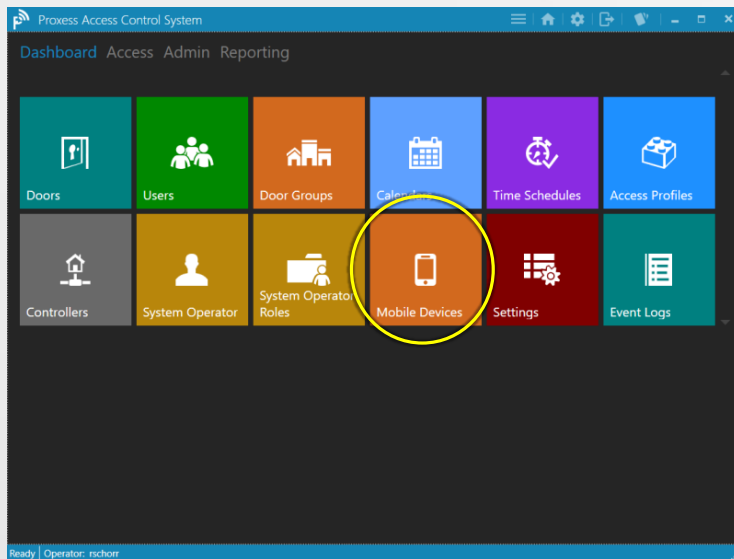

This is the list of all the Operators, including the one that was just added. To return to the Home Screen \ Dashboard, click on either the Home icon on the top task bar, or the "Admin" tab at the top left of the page.
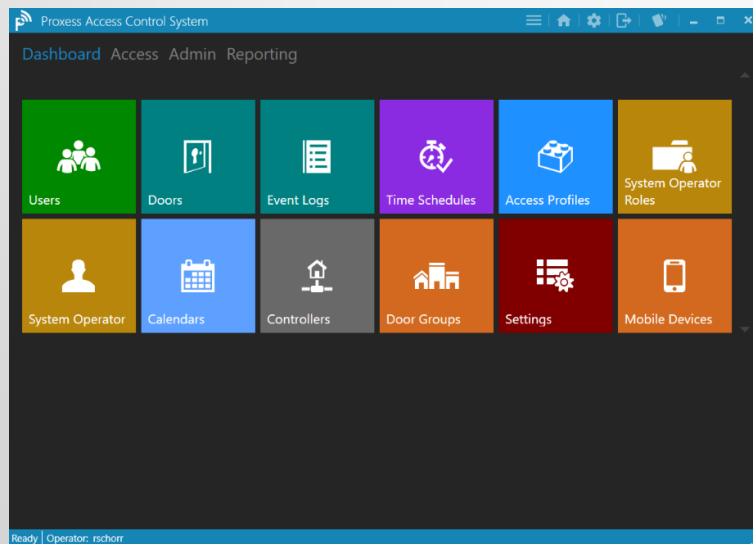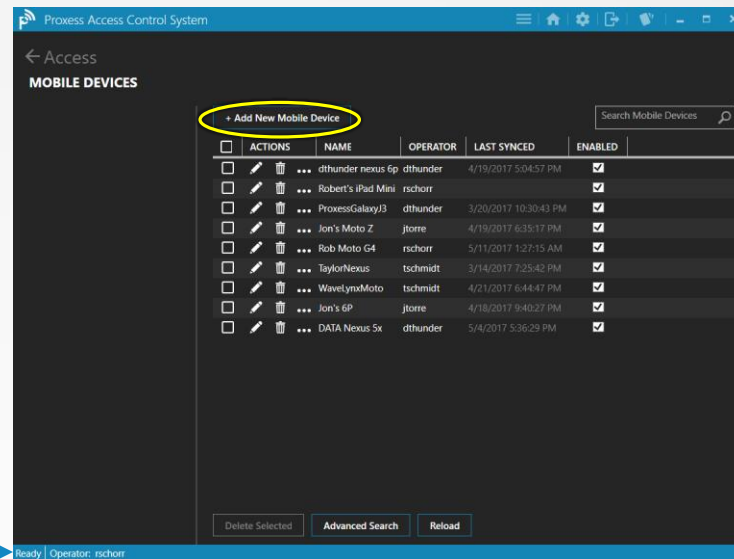

You have returned to the Dashboard \ Home Screen.
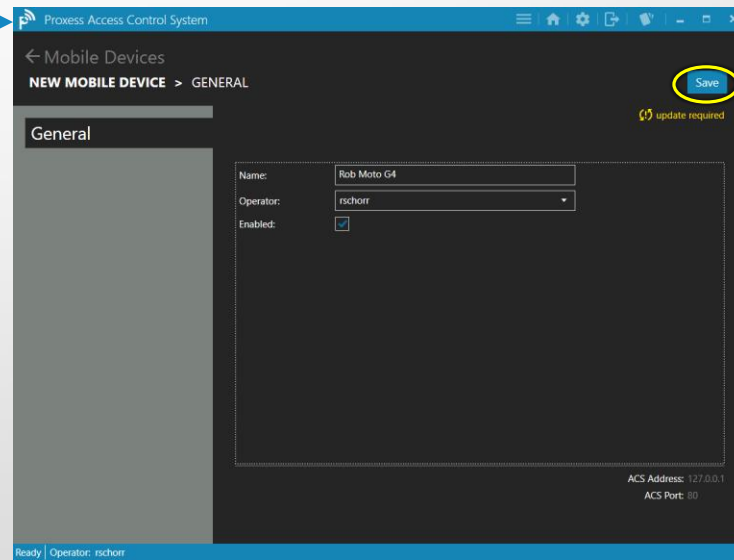
MOBILE DEVICES

To add a new (and manage existing) mobile phone to be used as an in-the-field programming device click on the "Mobile Devices" module icon.

This is the list of all the registered mobile phone Apps in the system. Click "Add New Mobile Device" to do so. To return to the Home Screen \ Dashboard, click on either the Home icon on the top task bar, or the "Access" tab at the top left of the page.
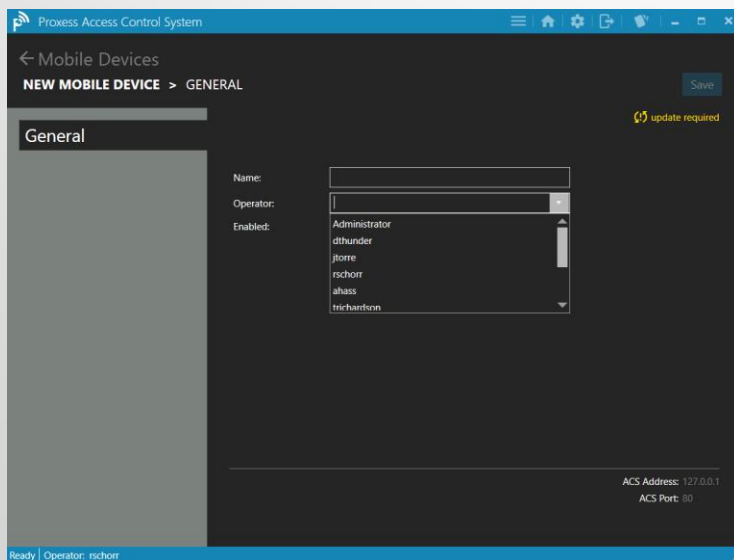
Enter a name for the mobile phone to be added. Select the responsible Operator for this App from the drop-down list.

Check the Enabled box and click "Save".

Click "OK".

A unique 2-dimensional bar code will be generated and displayed for use in the next module, "Mobile Phone App". Though there is nothing more to do but to click "Save", you may scroll down to view the other communications data.

No changes are encouraged or required to be made. Click "Save" to continue.

The list of all the registered mobile devices in the system will appear. You may enable, view, edit or delete any device you have access to in the list. To return to the Home Screen \ Dashboard, click "Access" or the Home icon in the top task bar.
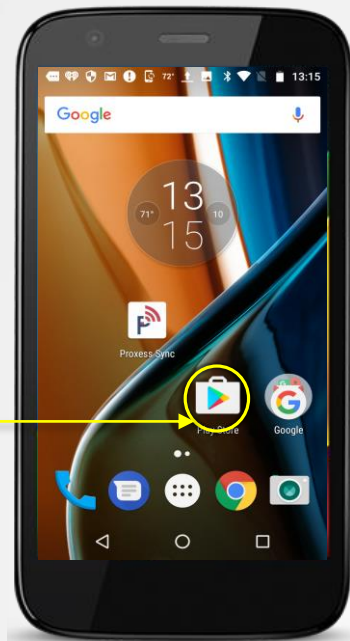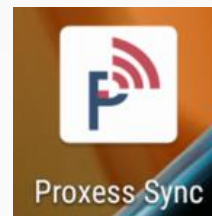
MOBILE PHONE APP
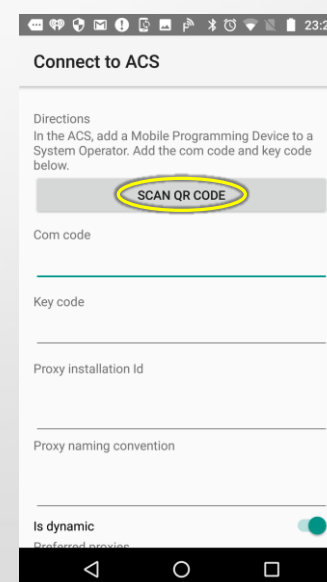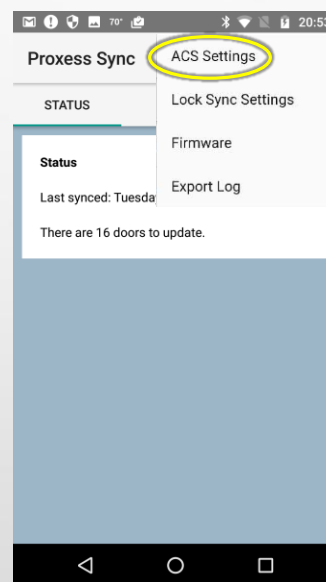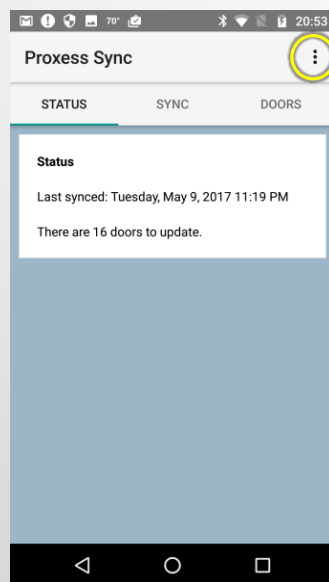# Proxess Sync™ INITIALIZATION

For lockset communication, assure Bluetooth is turned on.

For ProxessIQ™ synchronization, ensure WiFi and\or Mobile Communication is turned on.

Go to the Google Play Store and search for "Proxess". Select the "Proxess Sync™" Management App and download it to your phone.
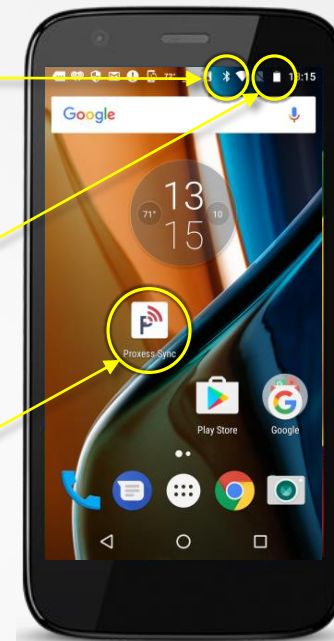
Proxess Sync

Click the Proxess icon to open the App.

Proxess Sync

STATUS   SYNC   DOORS

Status

Last synced: Tuesday, May 9, 2017 11:19 PM

There are 16 doors to update.

Proxess Sync

ACS Settings

STATUS

Lock Sync Settings

Status

Firmware

Last synced: Tuesda

Export Log

There are 16 doors to update.

Connect to ACS

Directions
In the ACS, add a Mobile Programming Device to a System Operator. Add the com code and key code below.

SCAN QR CODE

Com code

Key code

Proxy installation Id

Proxy naming convention

Is dynamic

Preferred proxies

The screen on the left will appear the first time the App is opened. Future openings of the App will display the last screen viewed from the last time the App was closed. Click the icon circled. Then click "ACS Settings" from the menu. The screen on the right appears. To initiate the App, click on "Scan QR Code". To continue, you must now open the ProxessIQ software and go to the "Mobile Devices" module and click on the Edit icon for the device you will now add.

Mobile App Screenshot
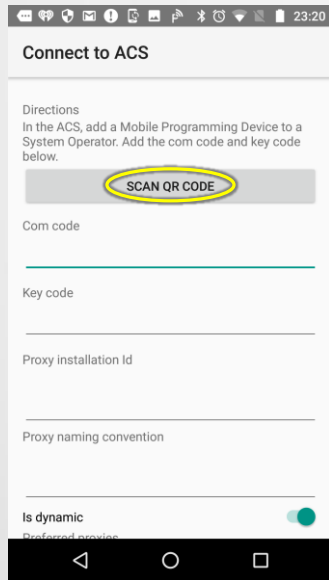
Mobile App Screenshot

PC Software Screenshot

Connect to ACS

Directions
In the ACS, add a Mobile Programming Device to a System Operator. Add the com code and key code below.

SCAN QR CODE

Com code

Key code

Proxy installation Id

Proxy naming convention

Is dynamic

23:20

Scan the QR code

Scan with Proxess Mobile App
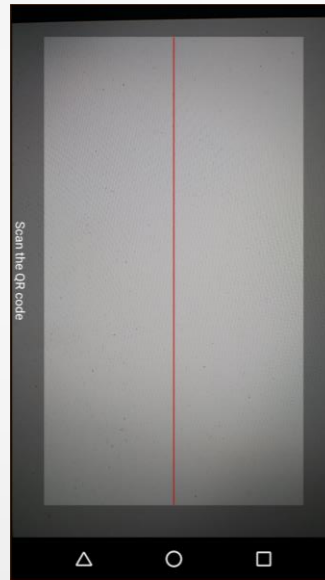
The screen on the left opens. Click the "SCAN QR CODE" button and the scanner screen in the center opens. This is a scanner, which uses your phone's camera to view the QR code that has appeared in the screen in the software where your new Mobile Device was added, shown in the image on the right.

NOTE: There are a few ways to scan the QR code in the software with the mobile phone being added:

- The first is to bring the phone to the software, open the "Mobile Devices" module and click the edit button for the mobile device being added where the QR code will then appear. With the scanner screen open, hold the phone over the code and all of the connection data will automatically populate as shown in the image below on the left. This connection data will match what is on that software page.
- If the phone is not near the software, a screenshot can be taken of the QR code and emailed to the person with the phone to scan it (from either the email screen or a printed copy) in the same manner as above.
- The third way is to manually enter all the data into the phone whether the phone is local or remote.
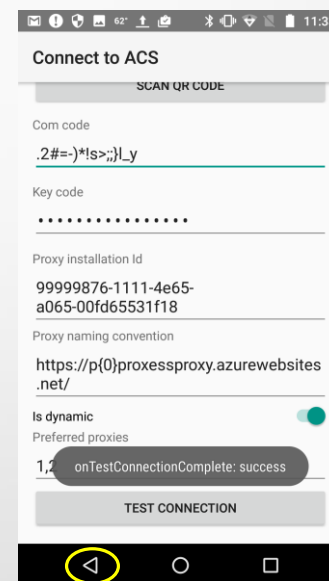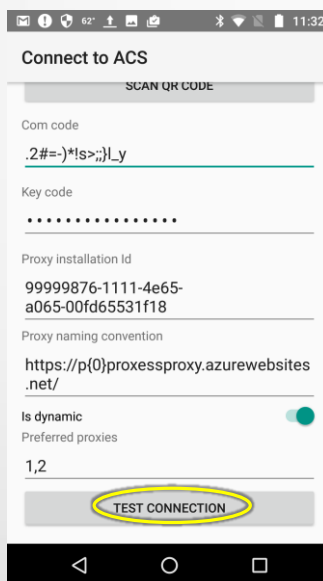
At the bottom of the phone screen, you may click "Test Connection" to verify the setup was successful.

Click the Back button on the phone to return to the Proxess Sync™ Home screen.

NOTE: In order to assure the Test works, it is necessary to verify that the phone has connectivity to the ProxessIQ™ software, wherever it is located, via either the customer's WiFi or the mobile phone network. These are matters for resolution between the customer and the integrator and are not the responsibility of Proxess.

MOBILE PHONE APP UPDATING the LoxIQ™

- Automatic Mode - for all locksets
- Manual Mode - for one lock at a time

NOTE: Bear in mind that Proxess Sync™ is a passive and un-hackable App in that the programming is done only from the ProxessIQ™ software. The App is simply presented to the locksets and the operator will simply need to click a button for the programming changes to be synchronized with the locksets.

If the access control software has changes to be synchronized, that note will appear here.
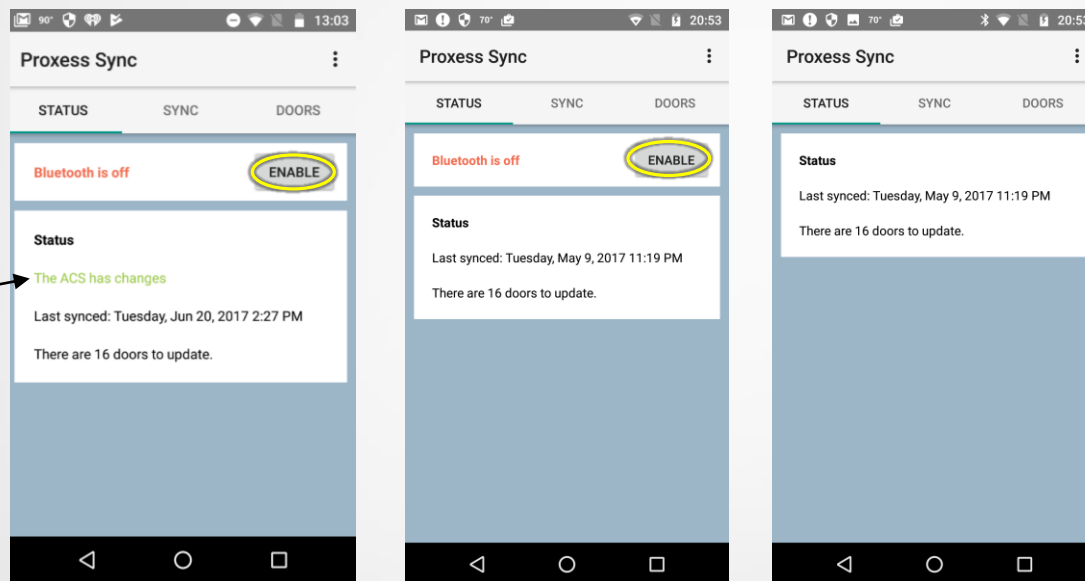
To use the Proxess Sync™ App to update LoxIQ™ locksets and gather their audit trail data to send to the ProxessIQ™ software, open the App and click on "Status" in the top menu. If Bluetooth on your phone is off, click "Enable" to turn it on or the phone will not be able to communicate with the locksets and no updating or downloading will take place.

NOTE: Before you will be able to proceed, it is also necessary to verify the phone has connectivity to the ProxessIQ™ software wherever it is located, via either the customer's WiFi or the mobile phone network. These are matters for resolution between the customer and the integrator and are not the responsibility of Proxess.
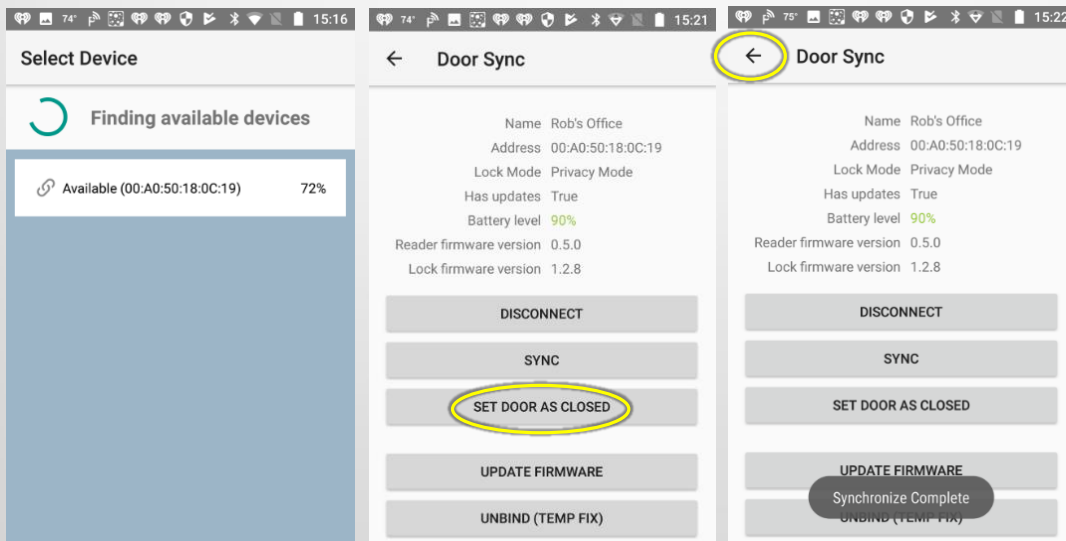
Sync with the Access Control System
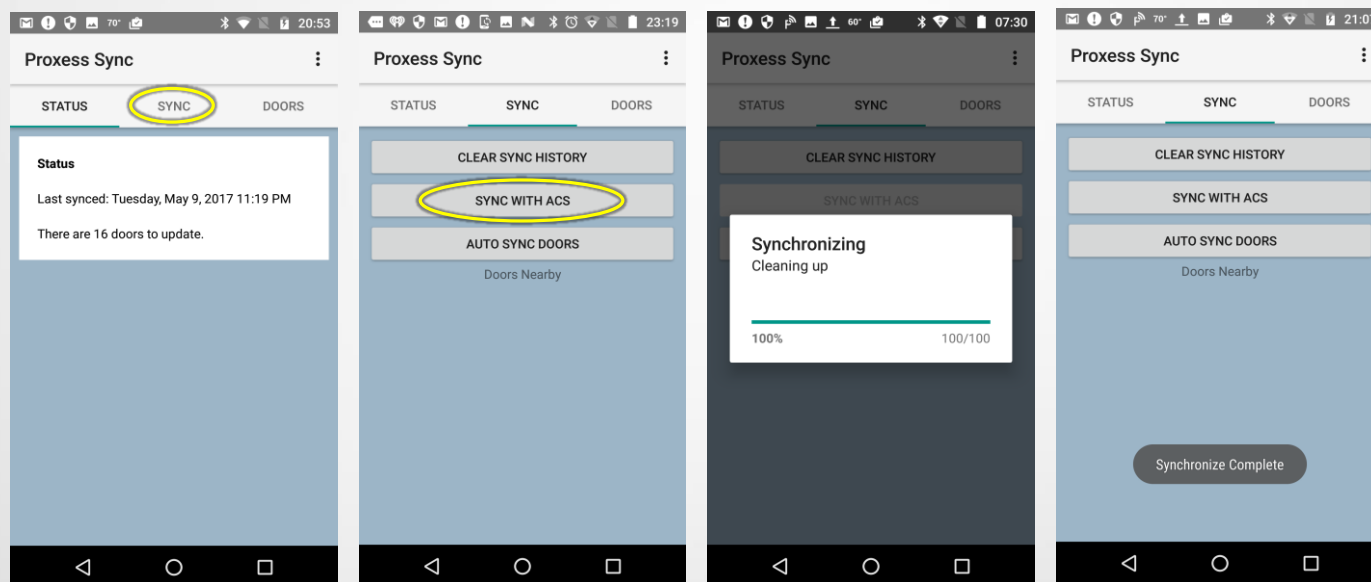
To perform any desired updates on the locksets, updates first need to be delivered to this phone. At this point, the phone does not need to be near any lockset. Click "Sync" from the top menu. The second screen above appears. Click "Sync with ACS" and the status bar will update you with progress and a note when the synchronization is complete.

Must Initialize a Lockset Prior to First Synchronization

To initialize a lockset click on "Doors" from the top menu. To see the door you are looking for, check the box for the location your lockset resides in. That list of doors will appear. Click on the lockset name to be initialized and the menu for that door will appear. Click on "Bind to Hardware". *Hardware* refers to the lockset. A status bar will appear (screenshot on the bottom left) and then the updated Door screen will appear (second screenshot on the bottom).

If the Privacy Mode and Lockdown capabilities are desired to be used, set the lockset to Privacy mode in the software and then click "Set Door As Closed" while the door is completely in the closed position. The *Synchronization Complete* bar will appear. The configuration is complete and you may return to other screens in the App or simply close it.

Automatically Sync with all (desired) Locksets
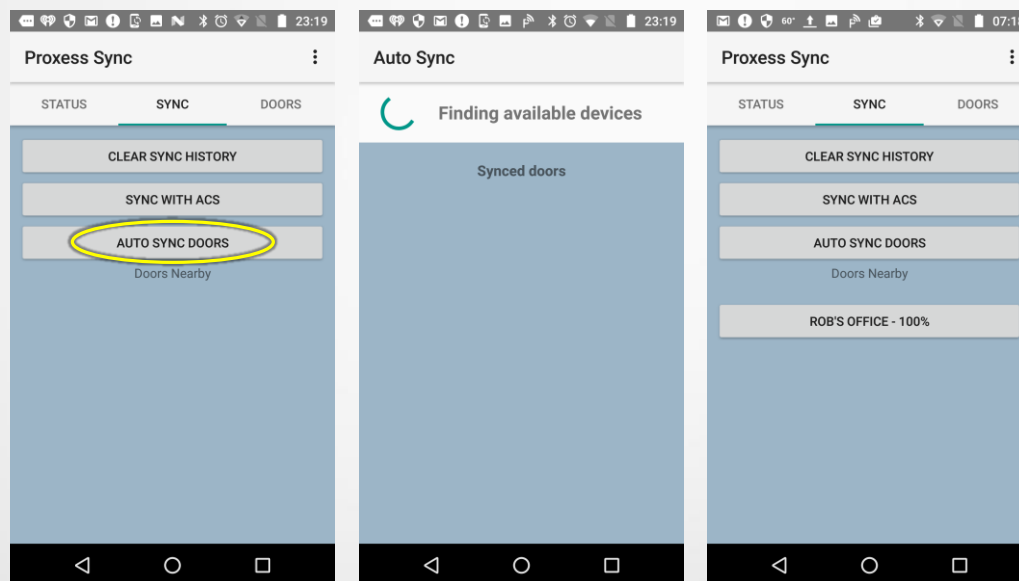
Once the ACS sync is complete and you are ready to update the locksets, click "Auto Sync Doors" and proceed to the first door to be updated. The middle image will be shown as the App begins looking for locksets. Hold the phone within three (3) inches of the locksets and the App will automatically begin the handshake, verification and update process. The App will show when the update has completed. You may proceed to the next lockset(s) to be updated without the need to click on further buttons.

NOTE: During the update process, audits will be collected from the locksets and as long as there is connectivity to the ProxessIQ™ software, those audits will be uploaded to the software and will be immediately available in the system Event Log.

Manually Sync with a Specific Lockset (1 of 2)
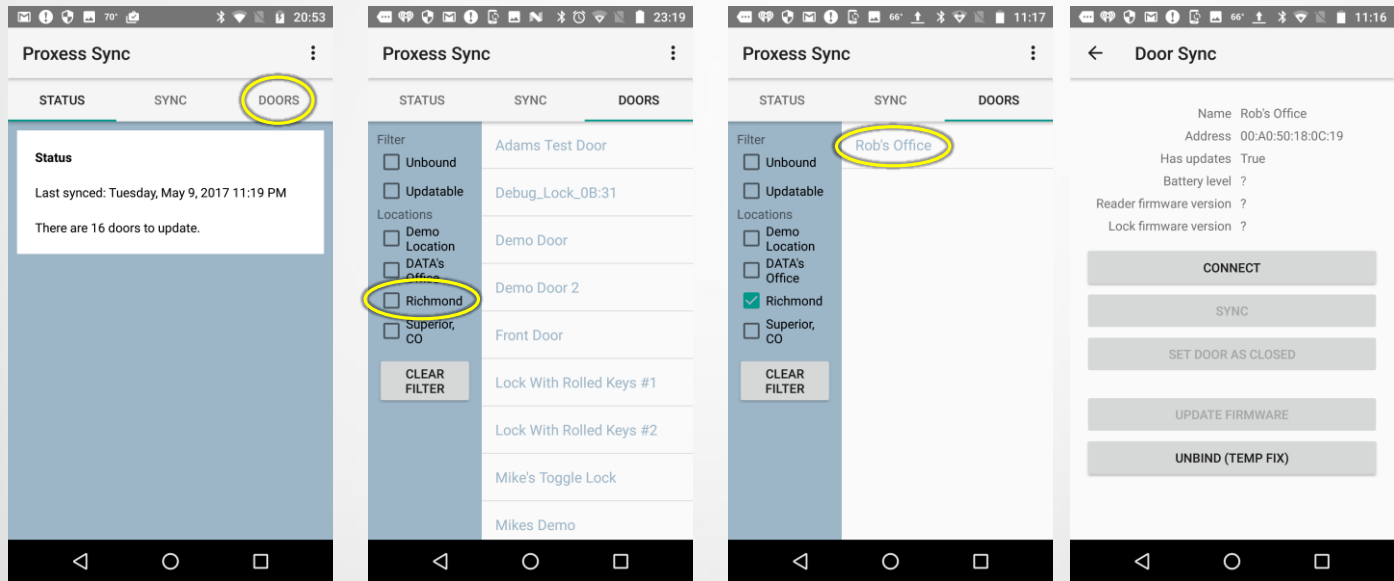
To manually perform any desired update on one specific lockset at a time, follow the instructions to "Sync with ACS" from the beginning of this section.

From the Home screen of the App, click on "Doors" from the top menu. To see the door you are looking for, check the box for the location your lockset resides in. That list of doors will appear. Click on the lockset name to be updated and the menu for that door will appear.

Manually Sync with a Specific Lockset (2 of 2)
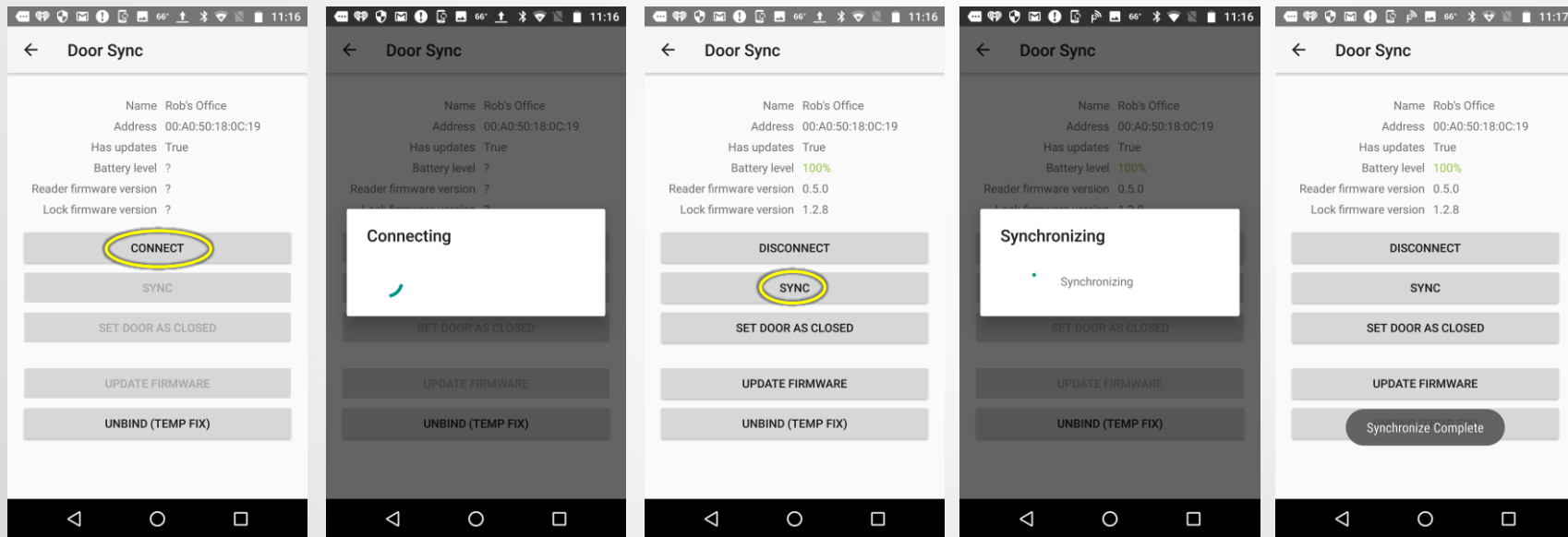
Proceed to the selected door and hold the phone within three (3) inches of the plastic on the face of the lockset. Click "Connect" to begin the update process. The status will show and once connected, click on the "Sync" button. The status will display (see the last image on the right) with a "Synchronize Complete" note at the bottom of the screen when the process is complete.

NOTE: During the update process, audits will be collected from the locksets and as long as there is connectivity to the ProxessIQ™ software, those audits will be uploaded to the software and will be immediately available in the system Audit Log.

MOBILE PHONE APP
LoxIQ™ SETTINGS,FIRMWARE UPDATES & LOGS

Sync Settings
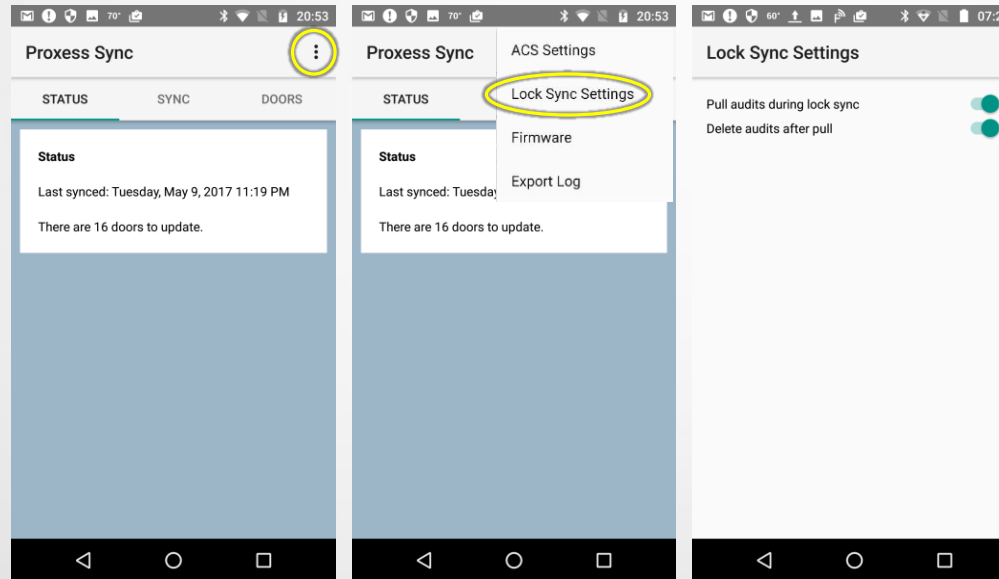
From the Home screen of the App, click on the icon highlighted in the image on the left. The menu in the middle image will appear. Click "Lock Sync Settings". The image on the right will open. The two features shown allow you to select the audit retrieval details for each phone. The first radio button allows the phone to automatically pull the audits off the locksets when they are synchronized. The second radio button authorizes the phone to delete the audit logs off of the locksets once they are uploaded into the App.

Lockset Firmware Uploading (Preparation)
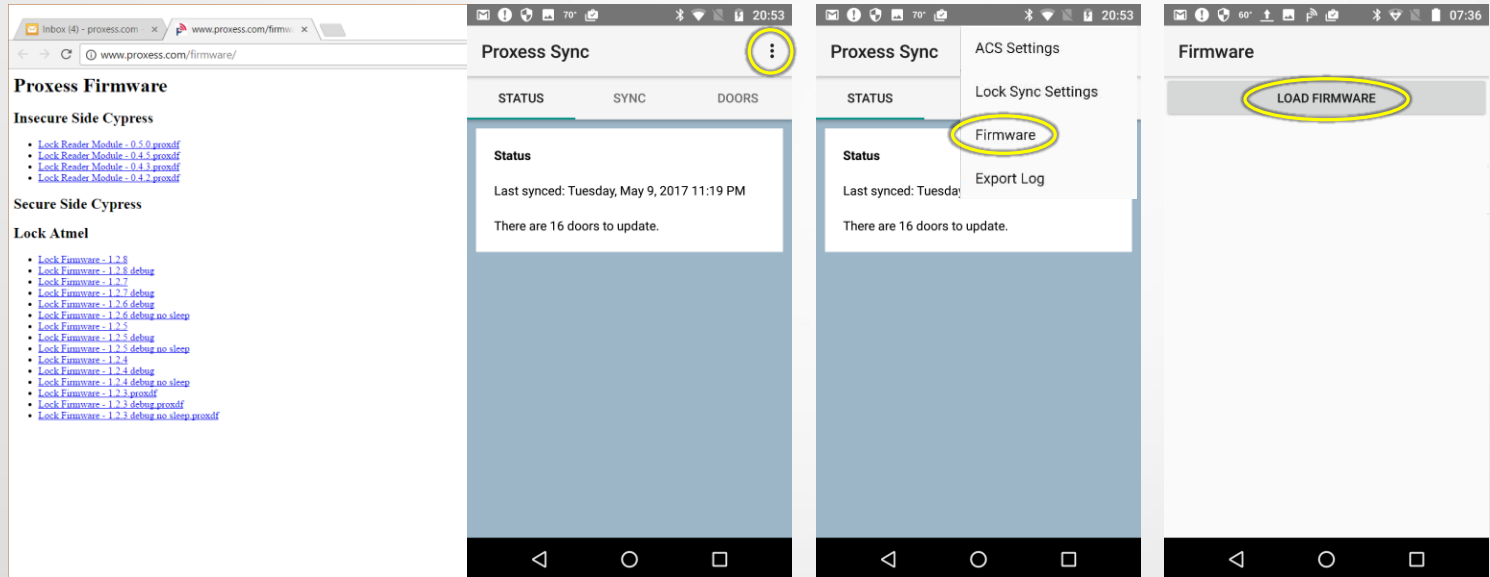
There are three (3) sets of firmware on each lockset, one each for BLE operations on the insecure side and the secure side of the door and one for the lockset PC board.

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 **firmware.proxess.com** and click on the link at the top of each of the columns (Inside, Outside & Lock). Save each file to your mobile phone and note the location. By default, most phones save downloads to the "Download" folder.

Loading will be performed by clicking on the highlighted icon on the Home screen of the App and then "Firmware" from the resulting menu. The Firmware page will open and if there is nothing listed, click on "Load Firmware" and proceed to the next step to load the new firmware.

Lockset Firmware Uploading (Preparation)
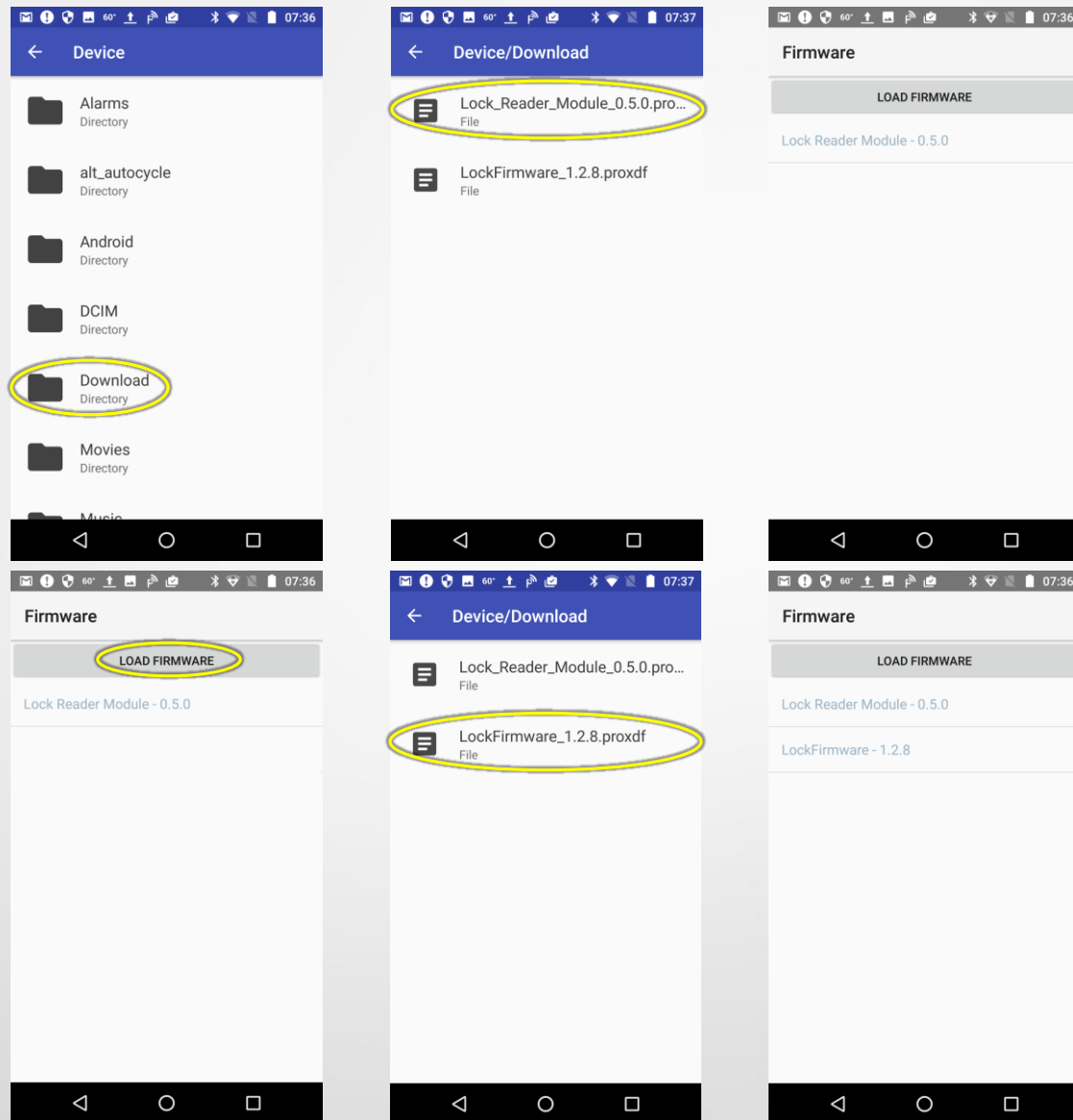
Go to your phone's file storage and download folder.

Select (click on its name in the "Device\Download" screen) any of the three (3) firmware files, one at a time, which are newer than what is shown on the locksets. You will see these files when you "Connect" with each lockset using the App. Then click on "Load Firmware" again to be brought back to the "Device Download" screen to select another file. Once all the files you wish to update are in your "Load Firmware" page, proceed to the next page.

Lockset Firmware Downloading (Execution)
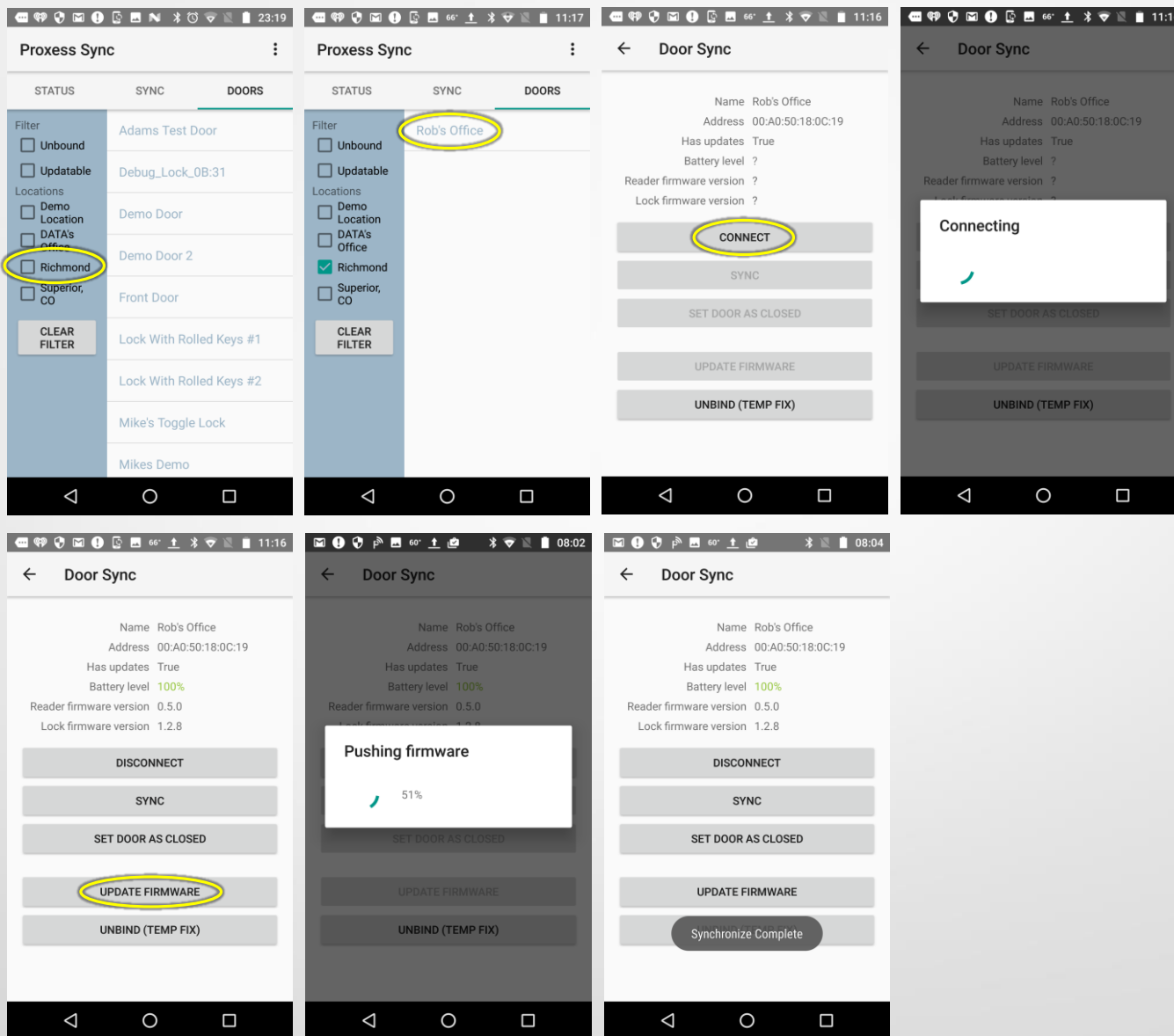
To perform the lockset firmware update, select "Doors" from the top menu. Select the location in which the lockset is located and then select the door from the resulting list. Click "Connect" and place your phone within three (3) inches of the plastic on the face of the lockset. The lockset will connect and will show its current firmware versions as well as its battery life. Click the "Update Firmware" button and the update(s) will occur (all the firmware files will update simultaneously) displaying the status.

Proxess Sync App Message Log Export
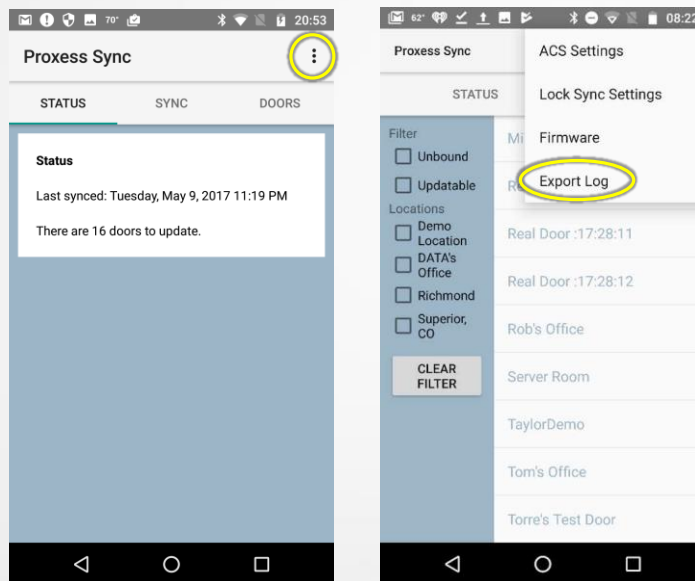
For advanced diagnostics, usually upon request from the Proxess Technical Support team, the Proxess Sync™ App maintains a support message log, which can be exported and emailed to Tech Support.
From the Home Screen of the App, click on the icon above and then click on "Export Log" from the resulting menu. Email the file that is downloaded into the phone's file directory.

TIME SCHEDULES
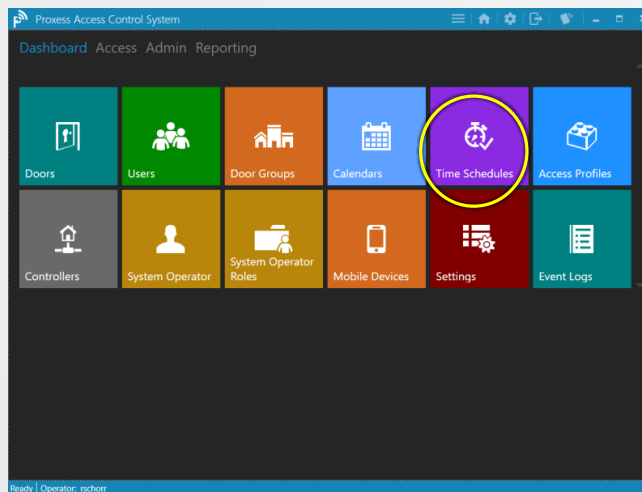
From the Home screen \ Dashboard, click "Time Schedules".
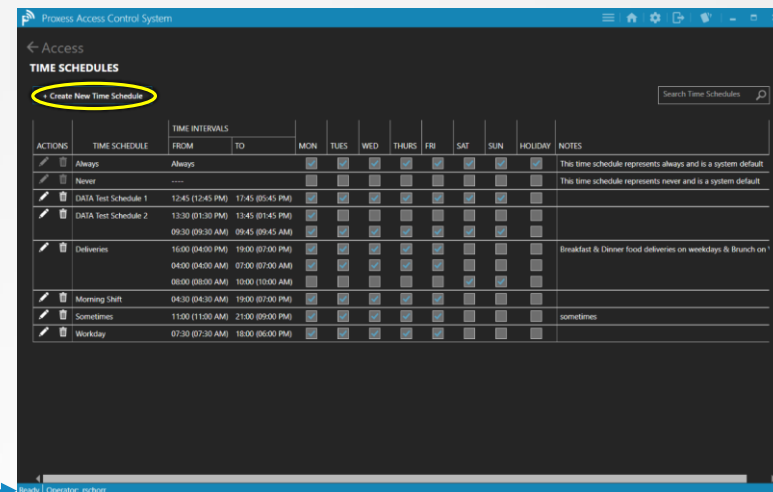
Click "Create New Time Schedule". You may use the Search box in the top right to find specific Time Schedule names if the list is longer than what is seen in the current view. You may edit or delete any existing schedule by clicking on its icon on the left side.
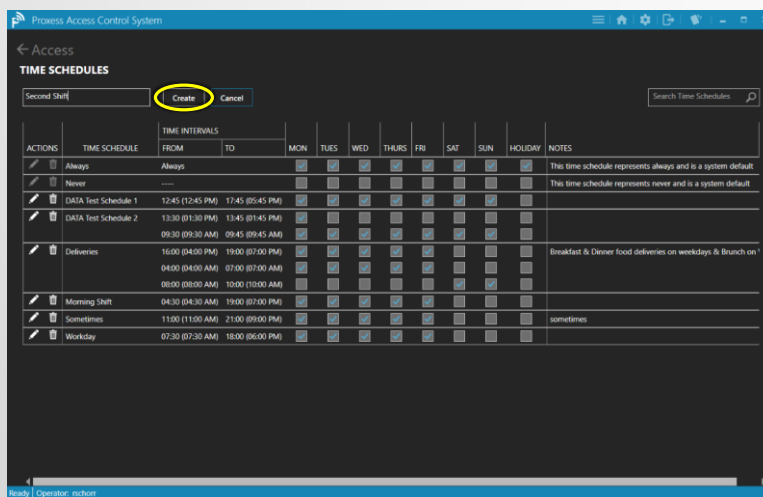
Type in a name for the new Time Schedule and click "Create".
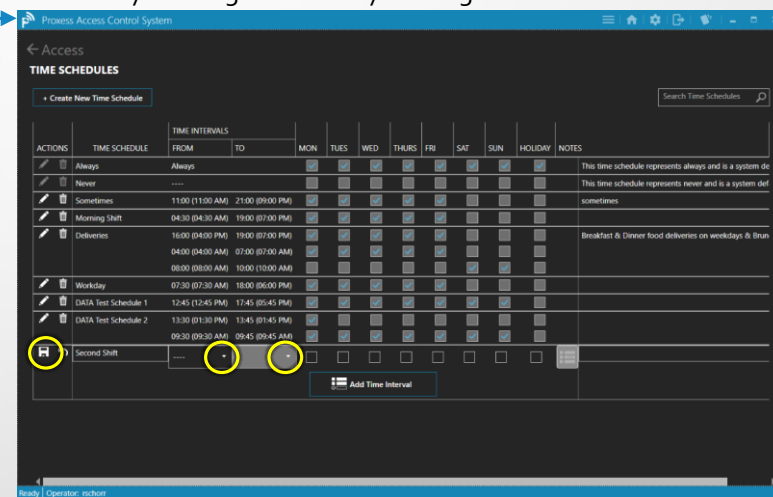
The new Time Schedule will appear at the bottom of the list. To select the overall time for it click the dropdown buttons for both the "From" and "To" columns. Select the days of the week in which this will be in effect and whether it will apply during Holidays. Optionally, add a note to describe the use of this schedule. Click the "Save" icon on the left side of the screen.
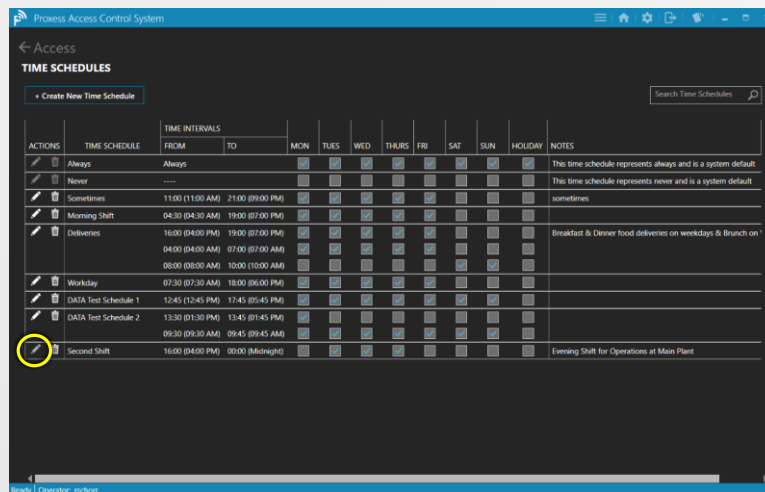
To make changes, or to add Time Intervals, click the Edit icon.
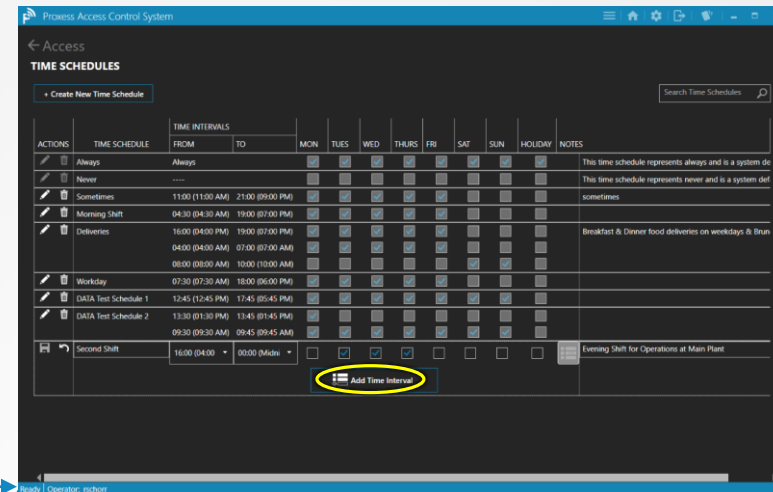
Click the "Add Time Interval" icon.
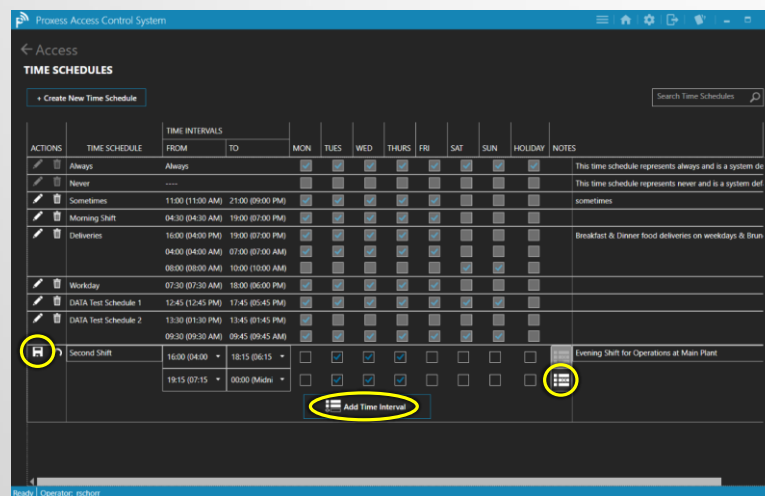
Add the second Time Interval and adjust the overall interval you previously entered. This could be used for a lunch period, for instance. In this case, the cards would grant access in the working areas during these intervals, but would deny access during the gaps between the intervals. Click the Save icon on the left, the Delete Interval icon on the right, or the Add Time Interval button.
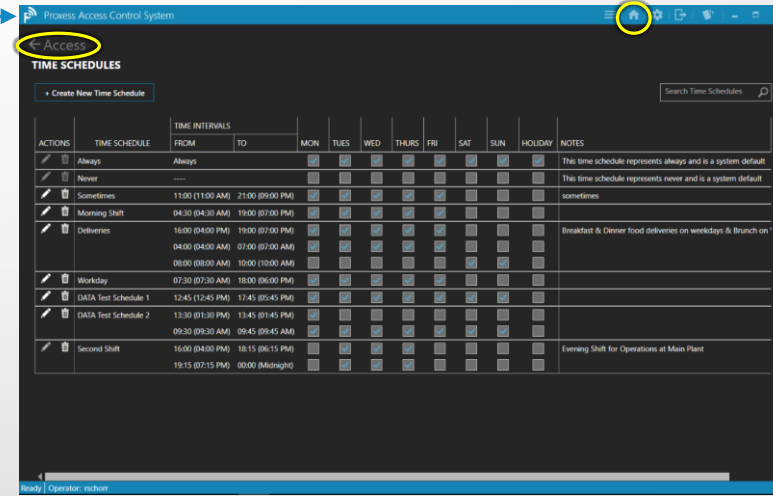
This is the screen you will see if you clicked Save. To return to the Home Screen \ Dashboard, click either "Access" or the Home icon in the top taskbar.

DOORS & DOOR GROUPS
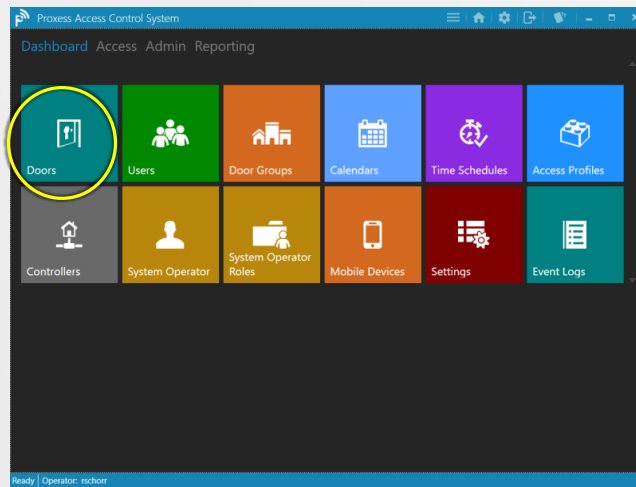
From the Home screen \ Dashboard, click "Doors". Before adding Doors, at least one Time Schedule and one Access Profile must be created.
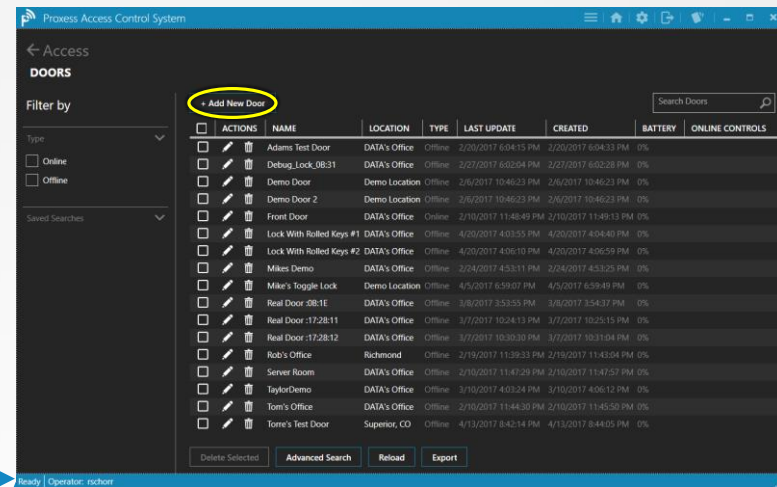
Click "Add New Door" to do so. You may also use the Search box in the top right to find existing Door names, or Filter the list by "Online" or "Offline" types using the checkboxes on the left if the list is longer than what is seen in the current view. You may edit or delete any existing Door by clicking on its icon on the left side. We will go over Advanced Searches at the end of this section.
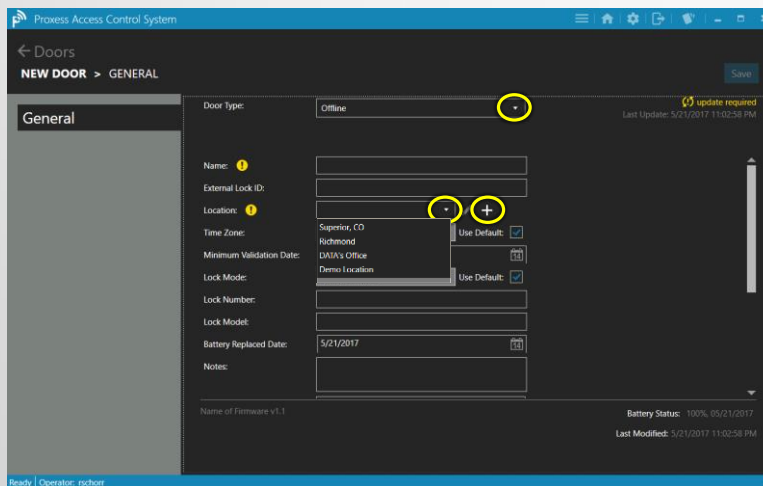
Select if the door will be online or offline. This selection will let the software know how to attempt to connect with this door for updates and on-demand commands. If you select "Online" you will need to add a Controller in a later section to connect it with.
Type in a name for the new Door and select a location from the dropdown arrow as shown above. To create a New Location, click the "+" shown above.
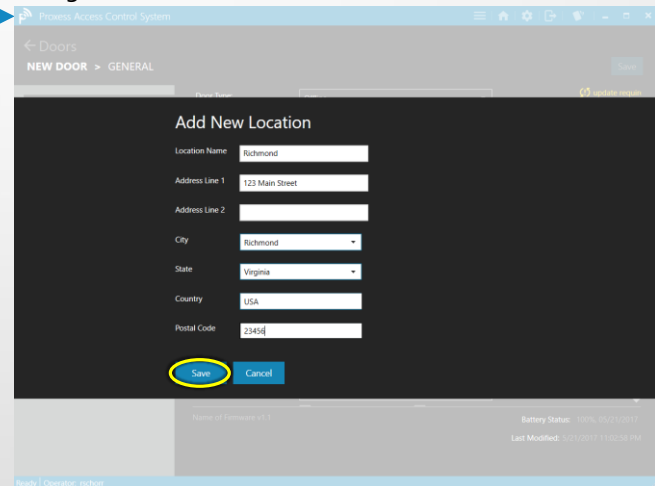
The "Add New Location" screen appears. Enter a "Name", and any other information you desire. Click the "Save" button to complete the action.

Continue entering information for the door. Add the Time Zone the door resides in and a Validation date for the door, which is typically used in the education and office leasing markets. A battery replacement date can also be put on a calendar. Select the appropriate Holiday Calendar and the Unlock Schedule when the door would not require a card for entry. A cardholder with a "First person In" card may be enforced before the door unlocks if the box is checked. The door may be put in a Toggle mode of operation during a specific time schedule. A Card-only schedule can be set for those doors where combination reader-keypads are installed. Finally, enter the times a door remains in the Unlocked position after a valid swipe, in the Extended Unlocked position, is Held Open and is Held Open-Extended and set. "Default" values may be found in the "Settings" module and in the "Door Defaults" tab. Click "Save" when done. Click "Doors" on the screen on the right.

Click "Advanced Search".

The Advanced Search bar appears. Click the first dropdown arrow to select the field or item you want to more granularly search. Click the second dropdown arrow and a context-sensitive list of information will appear to select from.

Initialize a Lockset (1 of 2)

NOTE: Once a new LoxIQ™ lockset Door has been created in the software, it **MUST** be initialized for operation using the Proxess Sync™ mobile App. **This initialization process is detailed here and it may be done at this step in the programming process,** or anytime until you need the door to be in service.
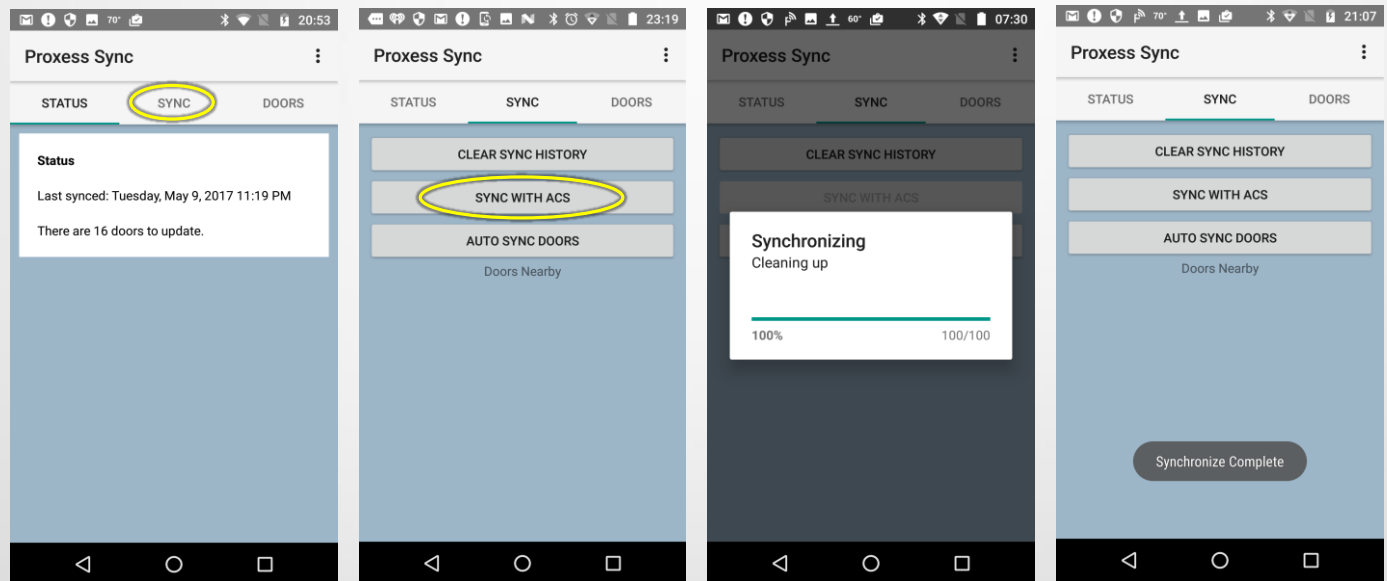
To perform any desired updates on the locksets, updates first need to be delivered to this phone. At this point, the phone does not need to be near any lockset. Open the Proxess Sync™ mobile App and click "Sync" from the top menu. The second screen above appears. Click "Sync with ACS" and the status bar will update you with progress and a note when the synchronization is complete.

To initialize a lockset click on "Doors" from the top menu. To see the door you are looking for, check the box for the location your lockset resides in. That list of doors will appear. Click on the lockset name to be initialized and the menu for that door will appear. Click on "Bind to Hardware". *Hardware* refers to the lockset. A status bar will appear (screenshot on the bottom left) and then the updated Door screen will appear (second screenshot on the bottom).

If the Privacy Mode and Lockdown capabilities are desired to be used, set the lockset to Privacy mode in the software and then click "Set Door As Closed" while the door is completely in the closed position. The *Synchronization Complete* bar will appear. The configuration is complete and you may return to other screens in the App or simply close it.

To the first search filter\criteria you have just entered, additional filters can be applied by clicking "Add Filter" and then selecting whether they are to be searched with all conditions needing to be met ("AND") or just one of the conditions needing to be met ("OR"). When all your desired filters have been added, click "Search" and the resulting list appears. Go back to the Main Screen \ Dashboard by clicking "Access".
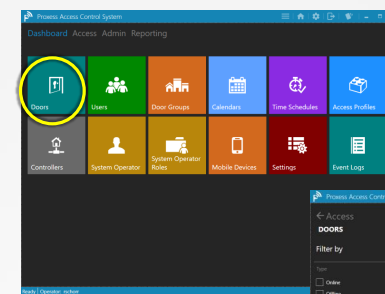
Click the "Doors" module and then click the edit icon for the door to continue editing properties for.
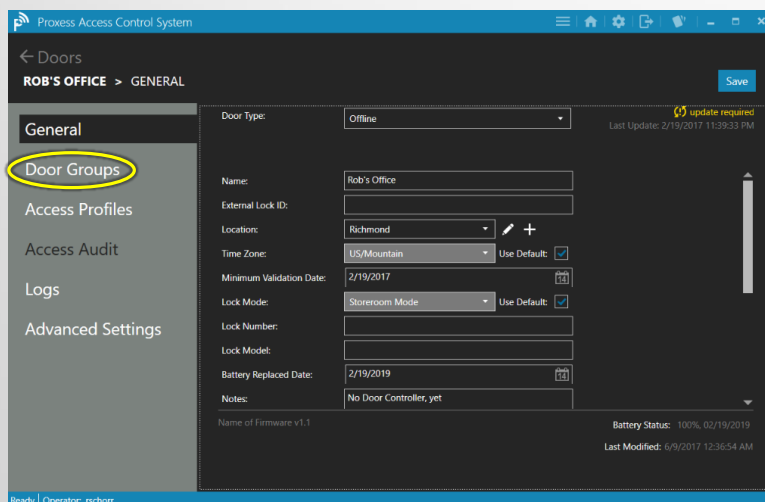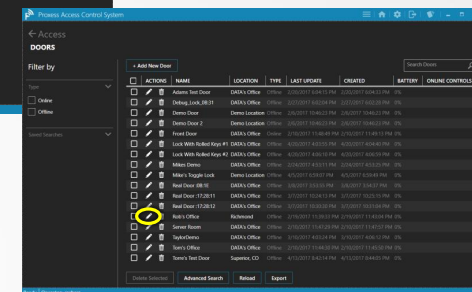
Click the "Door Groups" tab.
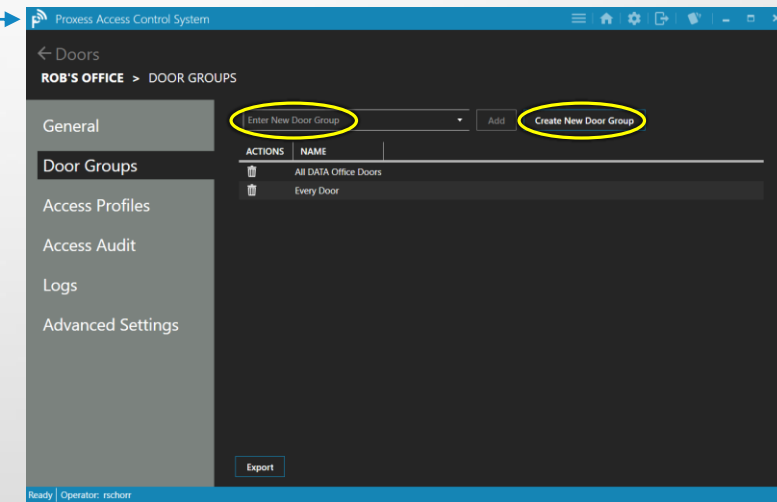
To add a new Door Group, type the name you want in the "Enter New Door Group" field and then click the "Create New Door Group" icon.
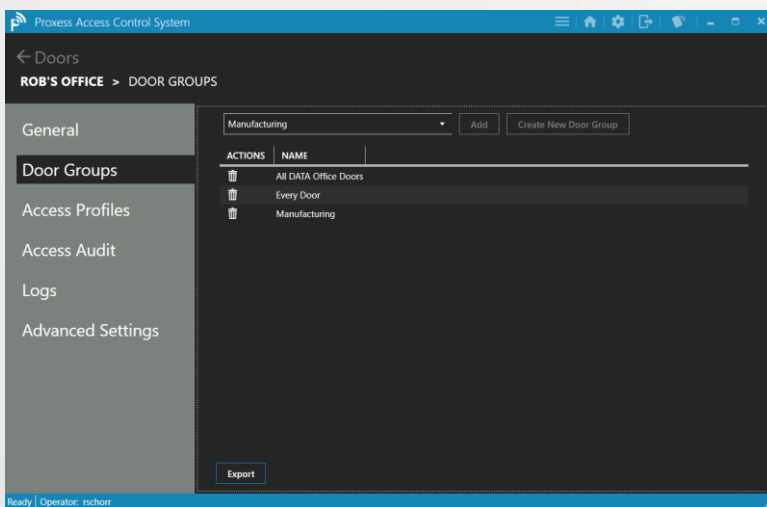
The new Door Group you have created will appear in the list for that Door and will become available to all other Doors in the system.
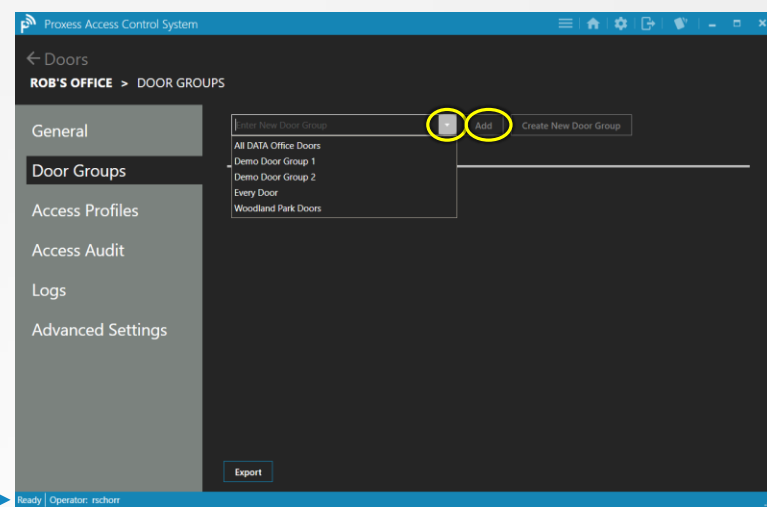
To add a Door Group for this Door to belong, click the dropdown icon and select a Door Group. Then click "Add". You can add a Door to as many Door Groups as you want.
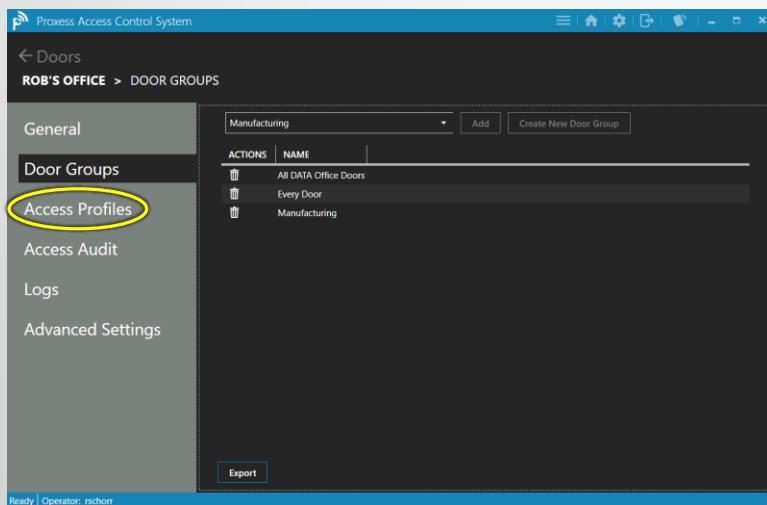
Click the "Access Profiles" tab.
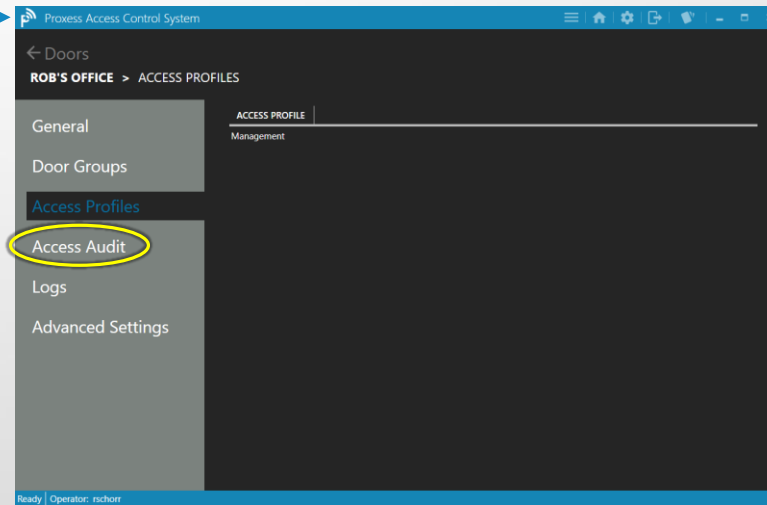
Any Access Profile that this Door is a part of will appear in this list. It is not necessary for a Door to be part of an Access Profile. If there is no Door listed, you may go back to the Dashboard \ Home Screen and click on the "Access Profiles" module to add this Door to an existing Access Profile or create a new one. Click on "Access Audit".

Each of the individual Cardholders\Users that have access to this Door will appear in this list. For any of the Users, click on their "View" icon.

This Access Audit view shows the relationship between the cardholder and their credentials and the door's record that we are in.

The insert on the bottom right of the screen allows you to see the entire relationship tree and the slide bar at the top of this insert can be moved to widen or narrow the main screen view.

Click "X" in the top right to close this view and return to the list of doors.

For a list of all the recorded Events at this Door, click "Logs".

Though you may scroll through this list, you may instead select a starting and ending date and time range for the events to be displayed making the resulting list more pertinent.
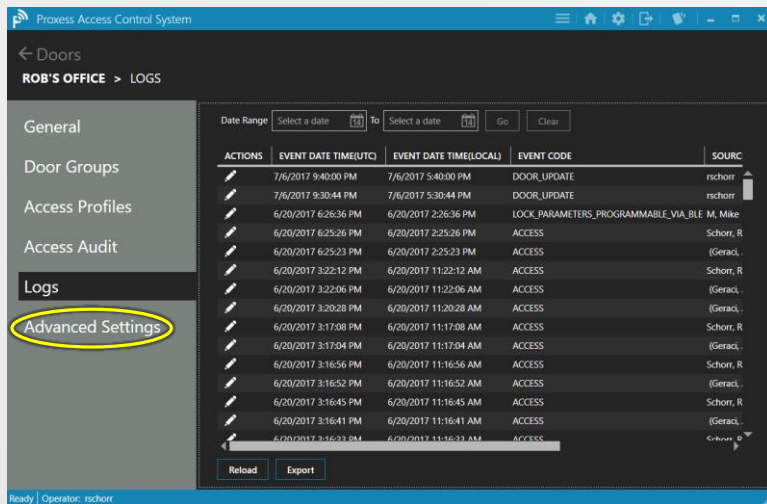
Click on the "Advanced Settings" tab.
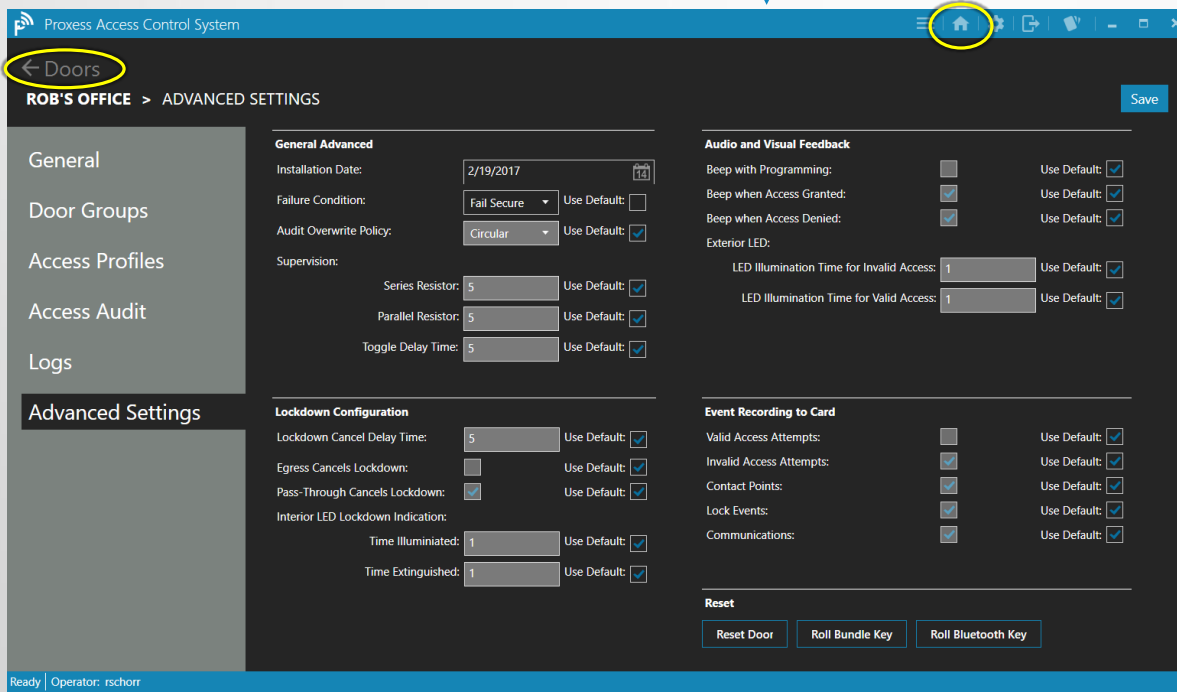
Everything in the "Advanced Settings" tab is initialized in a default mode with all the "Defaults" being edited in the "Settings" module. To change any setting, first un-check its "Use Default" box. A lockset is able to be set to Fail in a Secure, Unsecure\Safe or As-is mode. To return to the Home Screen \ Dashboard, click the "Doors" tab on the top left and then click "Access", or click the Home icon on the top right taskbar. (Jeff – We need a bit more room to explain the Lockdown options on this page, but they seem easy to understand, so I'm leaving it out of this document.)
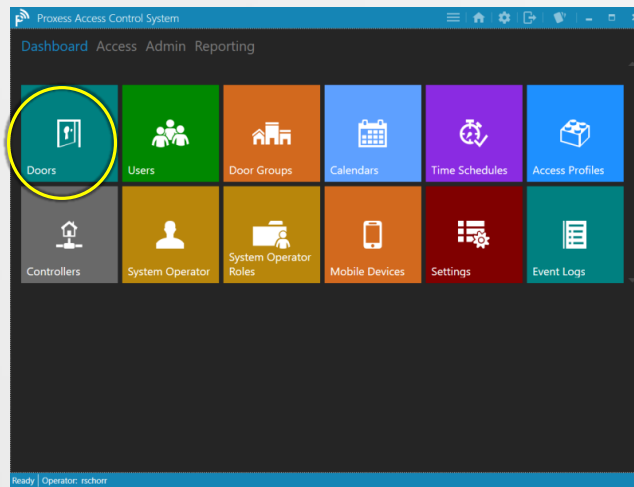
We will now review the real-time/online door controls. From the Home screen \ Dashboard, click "Doors".
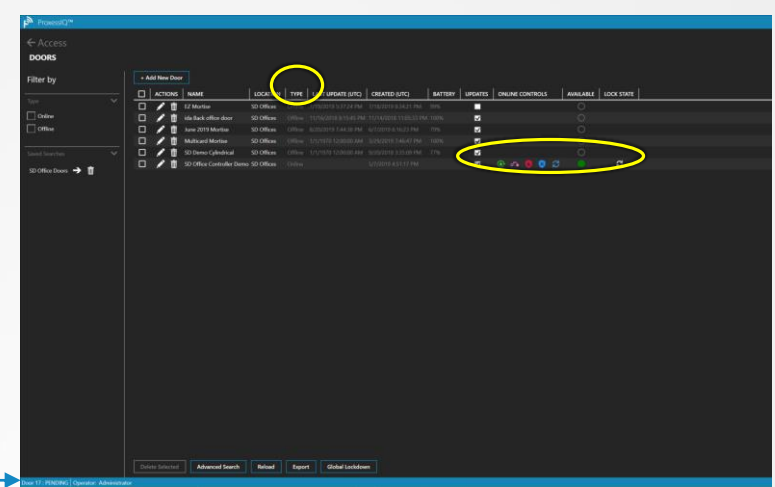
This is the User Interface for online doors and circled (on the right) are the available door controls. You can sort so that Online doors appear at the top of the list of doors by clicking on "Type", circled at the top of the screen.

Click this icon to Lockdown this door and this icon to cancel the Lockdown.

Click this icon to Toggle this door to an unlocked state. Click the icon again to Toggle it back to the state it was in.

Click this icon to Refresh the state of the lock.

This icon shows that the door has been programmed, but it is now offline.

Click this icon to perform a Quick/Momentary Unlock this door. The open time is as programmed into the Settings screen in the *Doors* module.
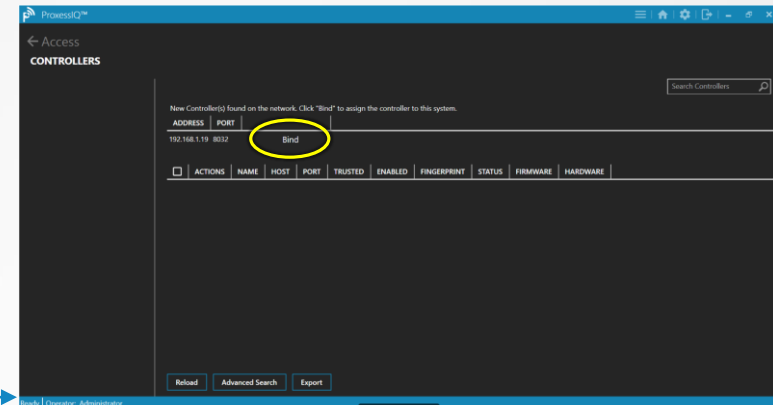
This icon shows that the lock has been and is locked.

This icon shows that the lock has been and is locked.

CONTROLLERS
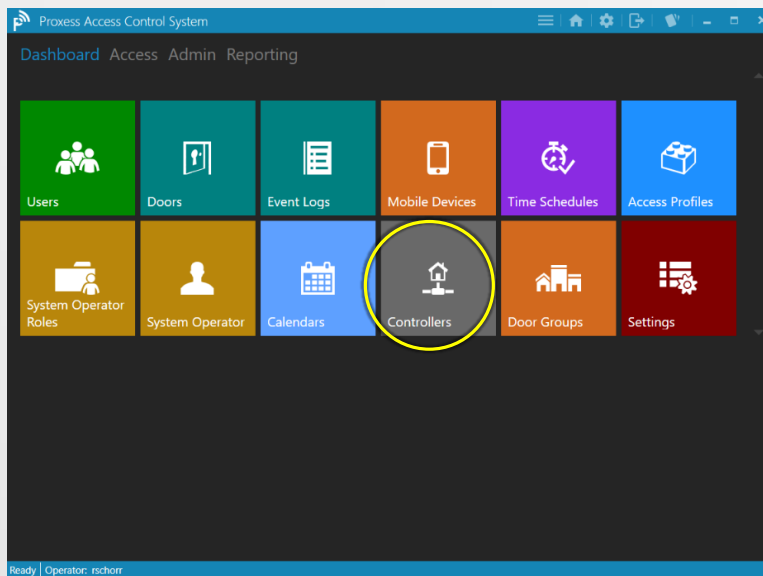
To add a controller to the system, click on the "Controller" module icon. After adding a Controller, you will then be able to select entry & exit readers that you have added into the "Doors" module to connect.

Any controller that is connected, within the guidelines of our BoxIQ Connectivity document located here on our website: www.proxess.com/documents/BoxIQConnect will automatically appear in this window. To avoid confusion, it is best to connect and configure one controller at a time.

Click "Bind" to connect the newly discovered controller with ProxessIQ
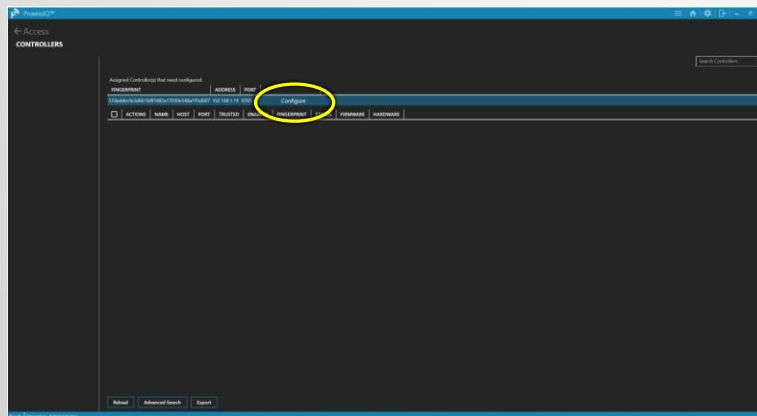
Now click "Configure" to have the software configure this controller for its proper function within this software instance.
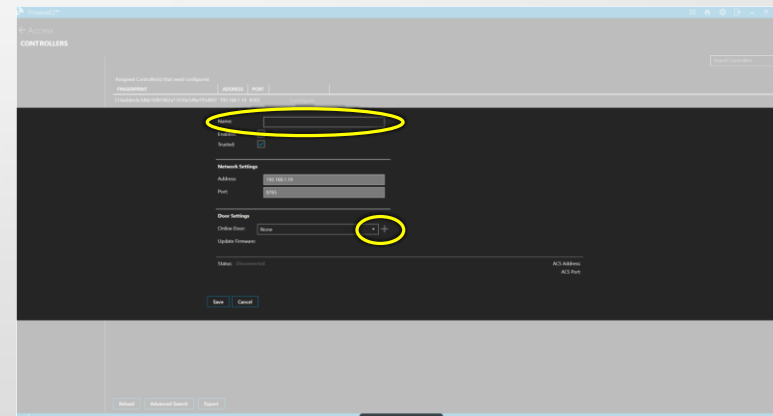
Type a name for this controller.
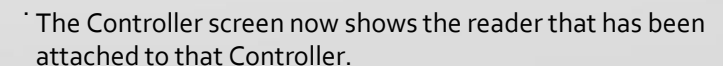Next, click on the drop-down arrow above.
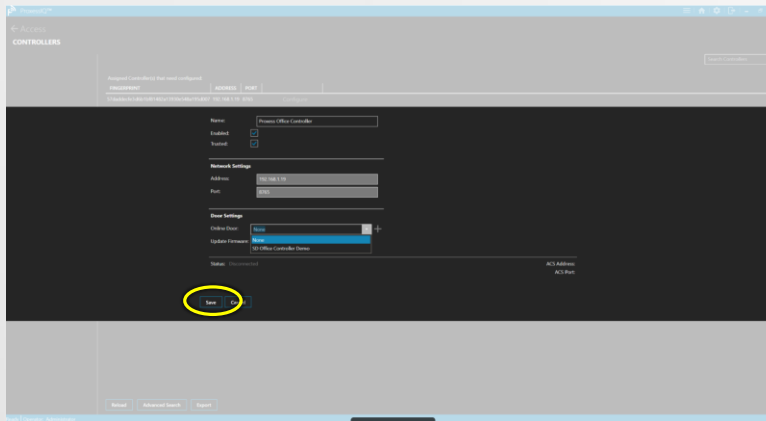
Select any reader that you have already entered in the "Door" module to be connected to this controller. Then click "Save".
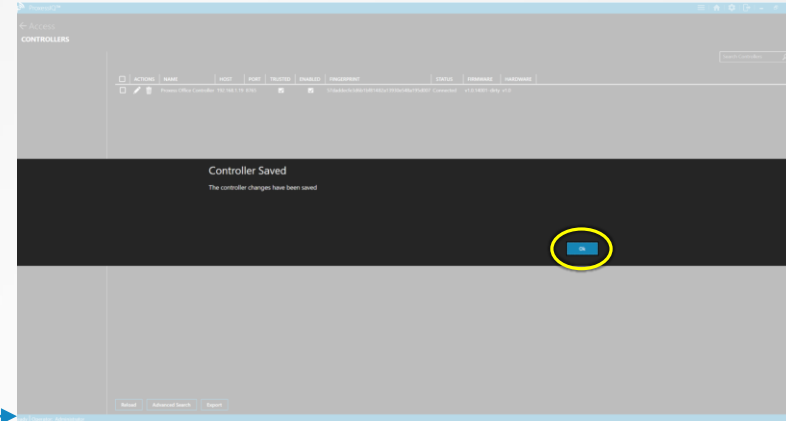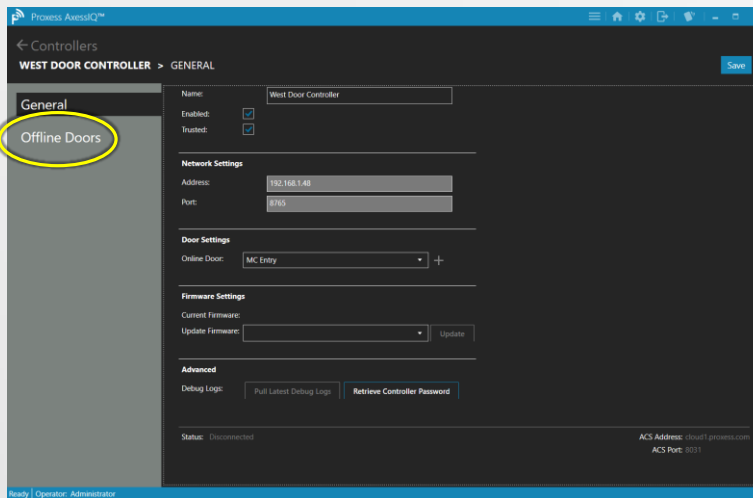

Click "OK" on the verification screen.
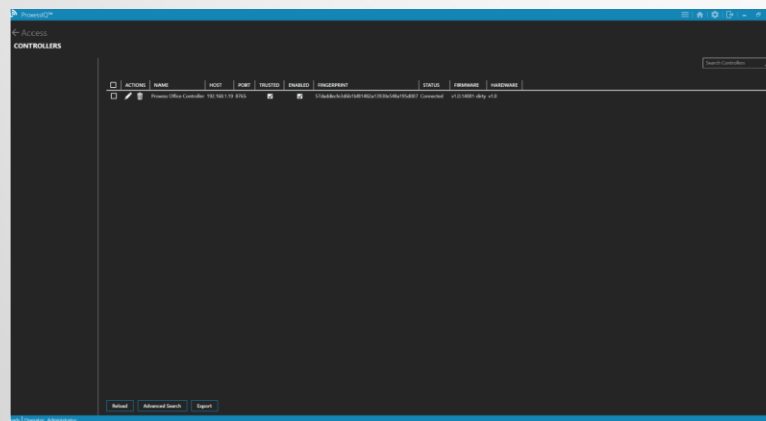
The Controller is now bound, configured enabled and shown as Connected and operational.

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To add a door controller to the system, click on the "Controller" module icon. After adding a Controller, you will then be able to select entry & exit readers that you have added into the "Doors" module to connect.

Now we will show how to add readers to a controller that is already in the system, click its *Edit* icon shown above.

Add any door that has been defined as "Online" in the "Door Type" field of the *Doors* module may be connected to this controller by clicking this arrow and selecting it from the drop down list.

The Controller screen now shows the reader that has been attached to that Controller.

Now click on "Offline Doors" to bind cylindrical locksets, mortise locksets and Mini-Controllers to the Controller.
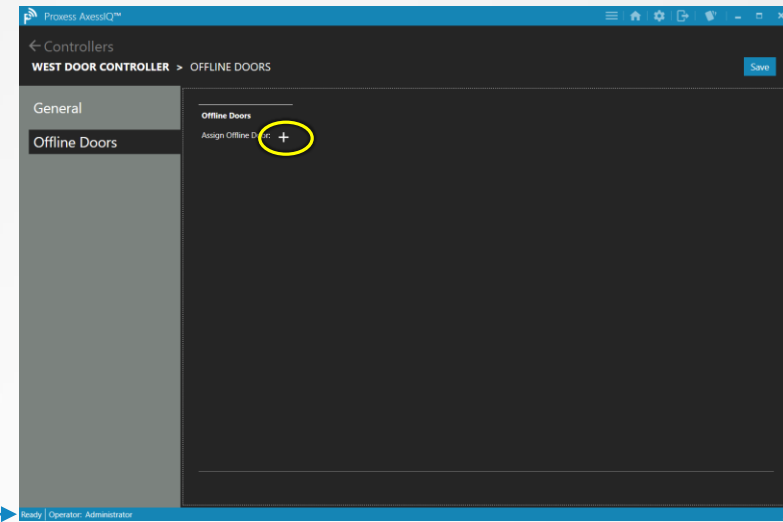
Up to eight (8) locksets and mini-controllers can be bound to a single controller.
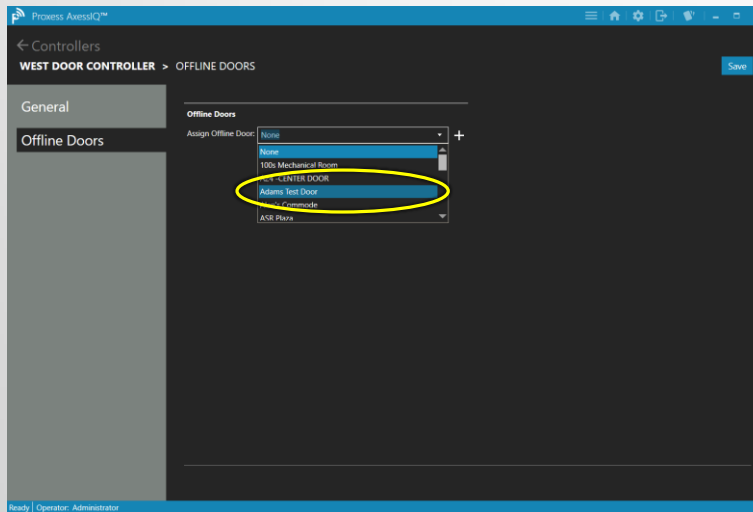
Add any door (i.e. Lockset and Mini-Controller) that has been defined as "Offline" in the "Door Type" field of the *Doors* module may be connected to this controller selecting it from the drop-down list.
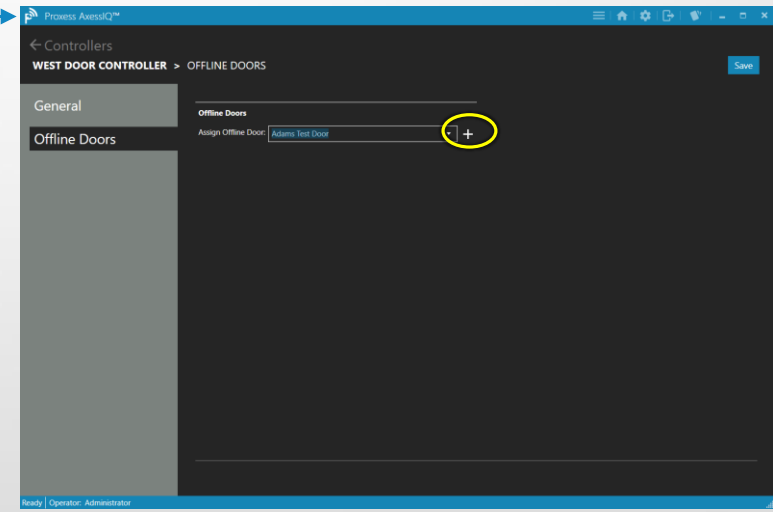
˙Up to eight (8) total locksets and mini-controllers can be connected to a controller.
A lockset or M-C can only be connected to one (1) controller.
Take care to select locksets or M-Cs to be connected that can easily be "seen" and controlled by the software, in the "Doors" module.

ACCESS PROFILES
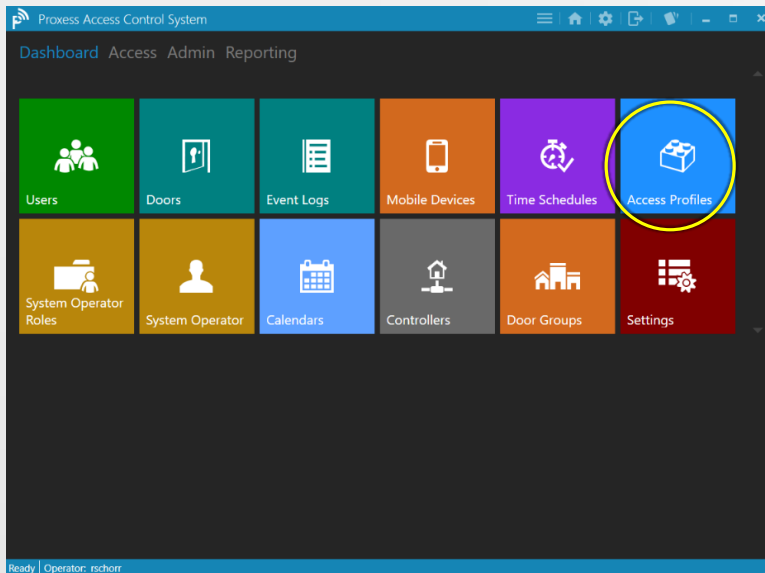
Access Profiles combine Time Schedules and Doors (and Door Groups) together and can then be assigned to Users. To create or edit them, click the "Access Profiles" icon.
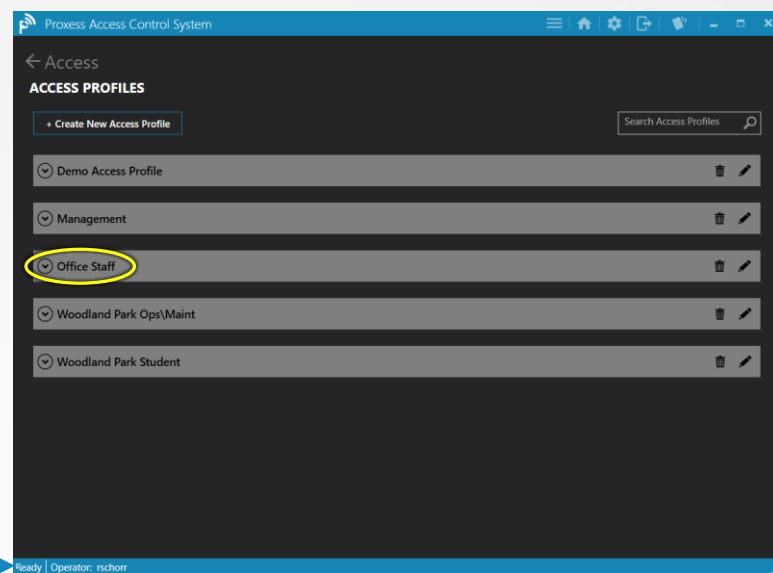
For a quick edit note, if there is one, click an existing Access Profile.
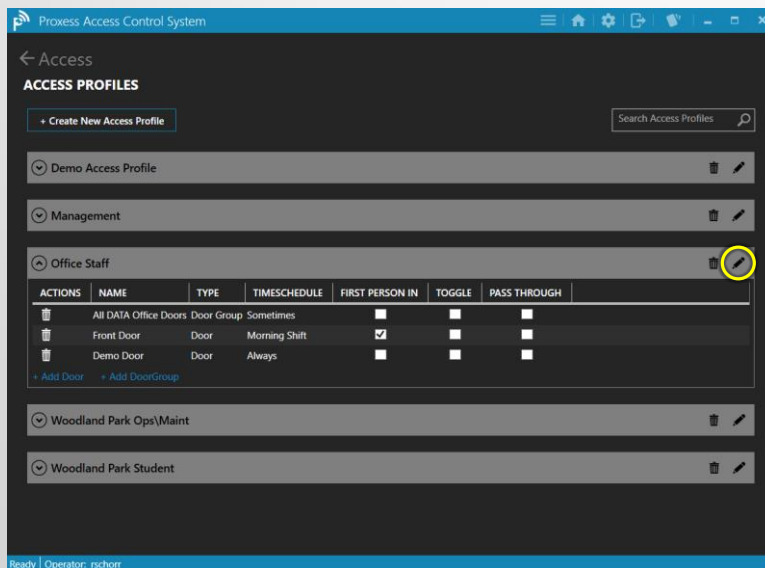
Click the Edit icon.
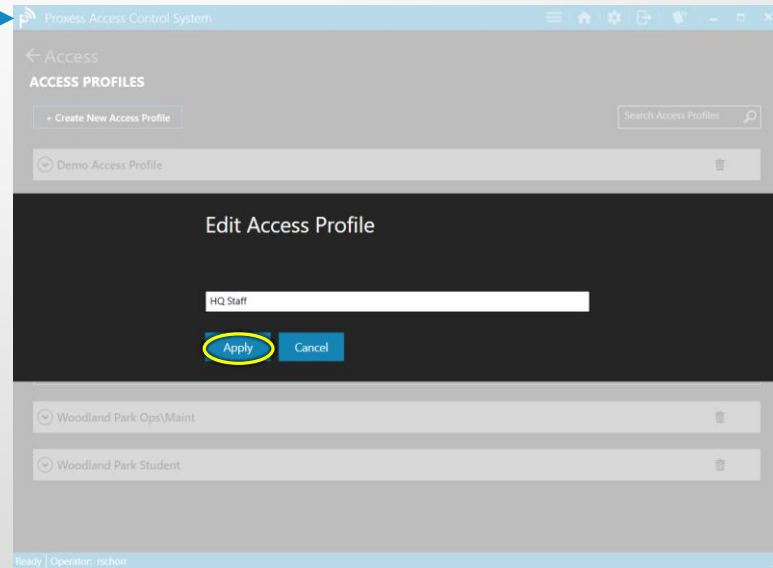
Change the name and click "Apply".
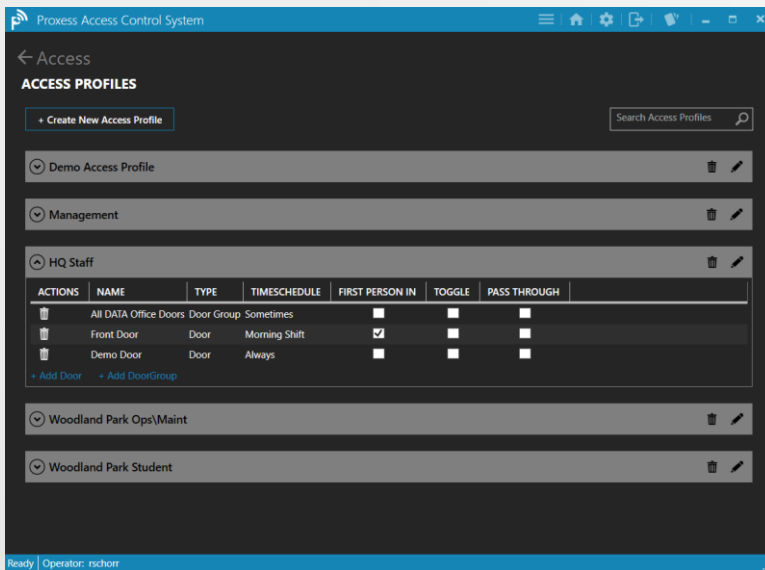
The new Access Profile name appears.
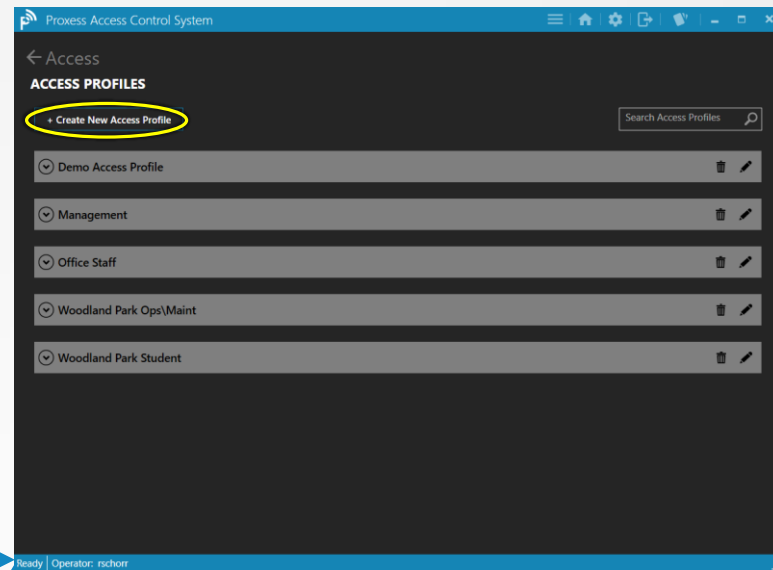
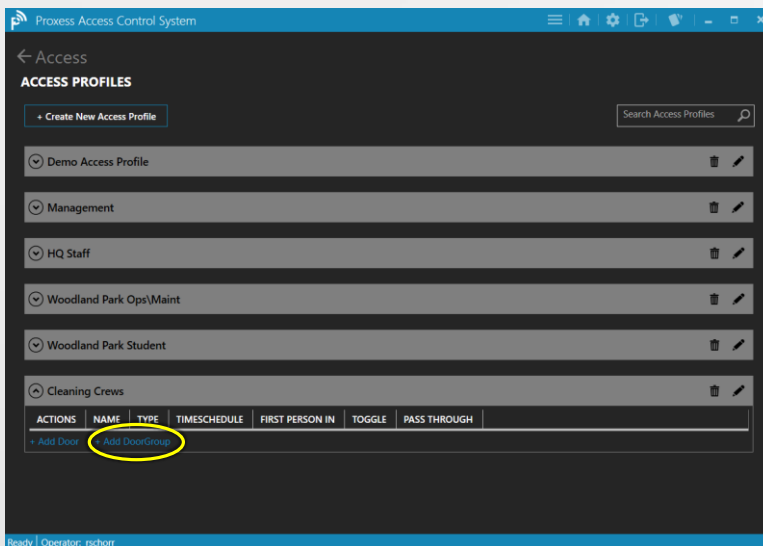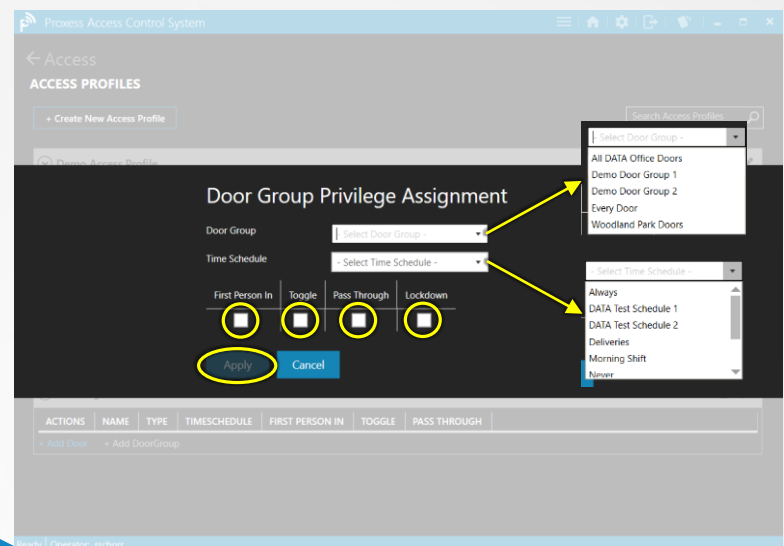Click "Create New Access Profile".
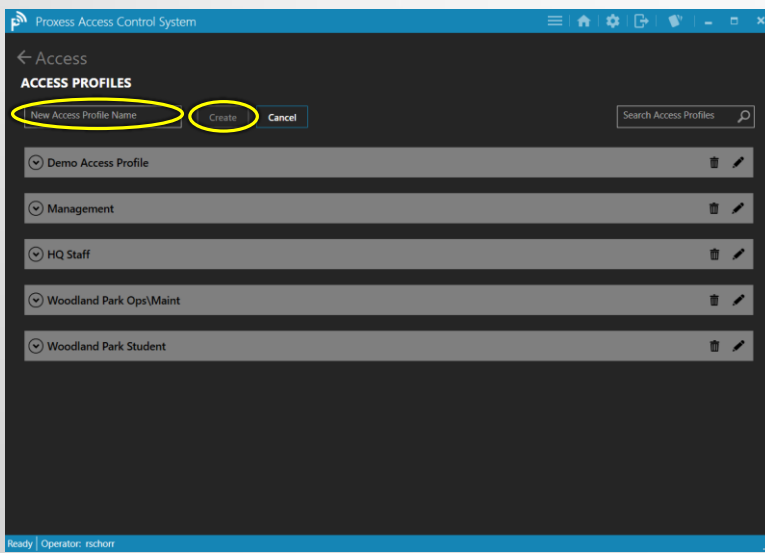
Enter a name for the new Access Profile and then click "Create".
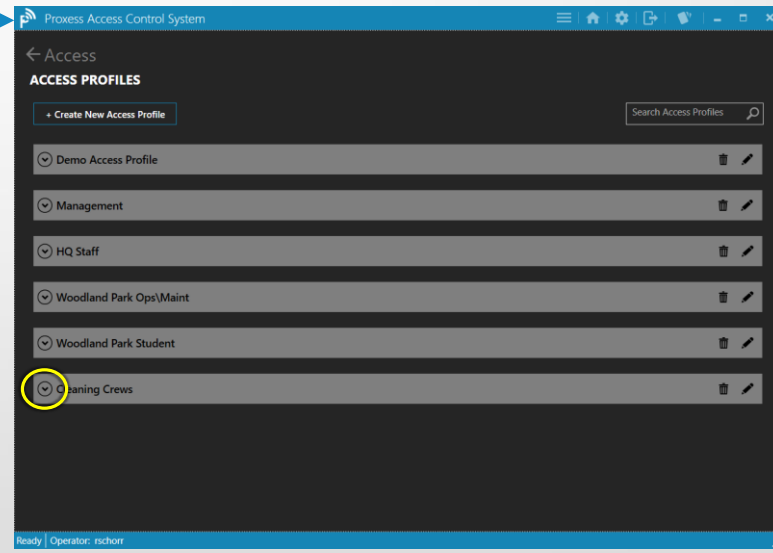
The new Access Profile appears. Click the dropdown arrow to view and edit the details.

To add a Door Group to the new Access Profile, click "Add Door Group".

Use the dropdown arrows to select the Door Group to add along with the corresponding Time Schedule that those doors will operate within. Check any of the features that can be used at those doors by appropriately designated cardholders\Users and click "Apply".
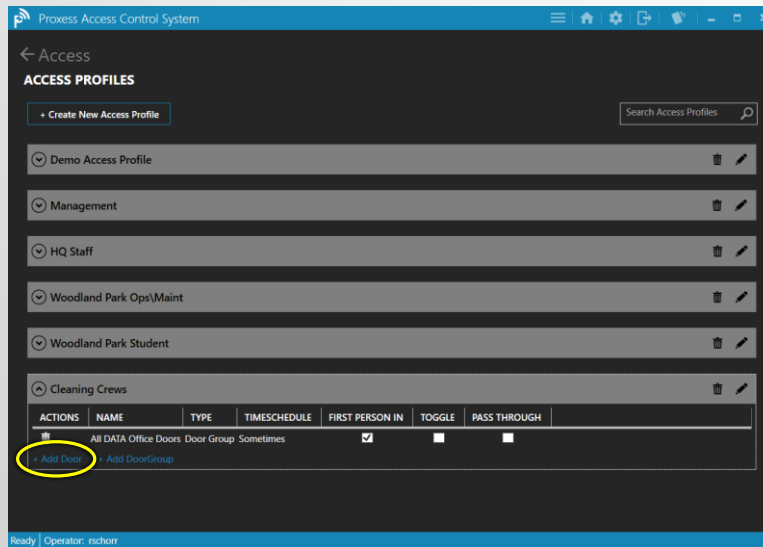
After adding a Door Group and returning to this screen, click "Add Door".
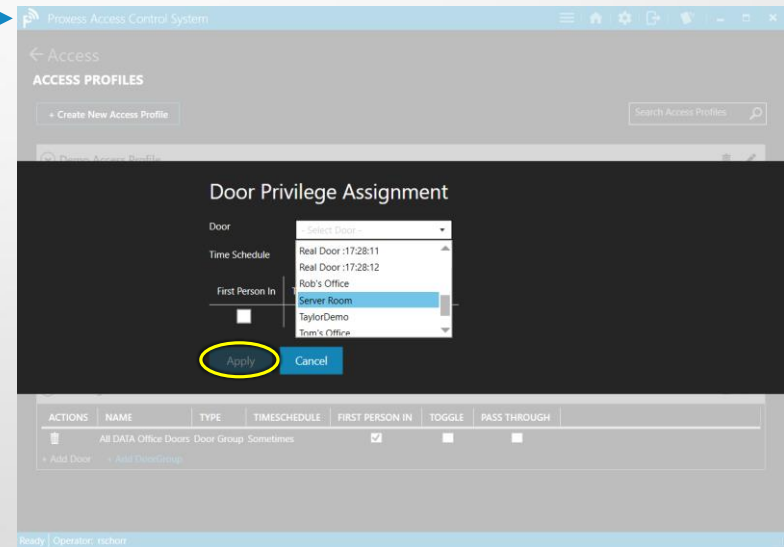
After clicking the "Add Door" button from the main Access Profile screen, select the Door and its corresponding Time Schedule and check off the features that can be used at those doors by appropriately designated cardholders\Users and click "Apply".
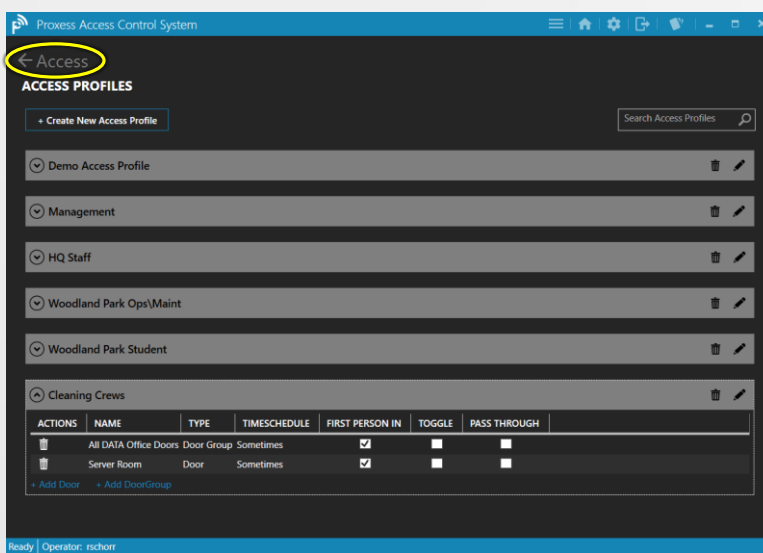
This is the screen you will see after you click Save. To return to the Home Screen \ Dashboard, click either "Access" or the Home icon in the top taskbar.

USERS
Adding & Editing
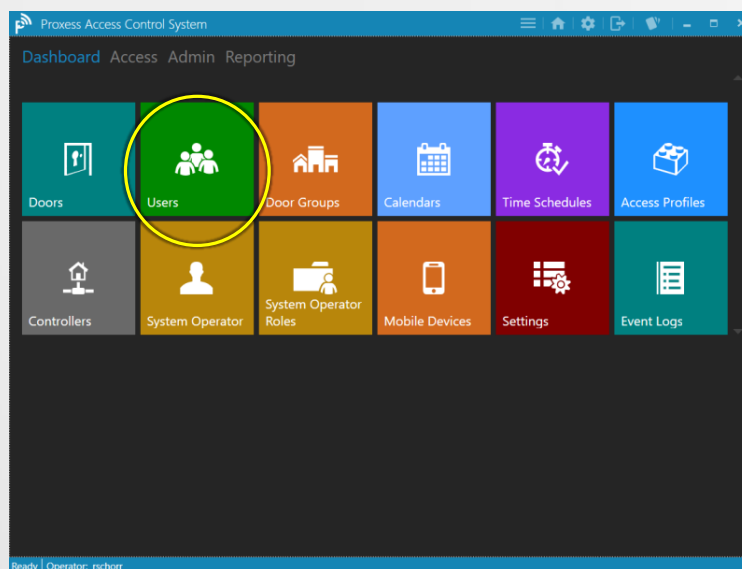
The Users module is where we add and edit new Users\Cardholders and credentials. Their rights to access doors and door groups are also definer here. Click the "Users" icon.
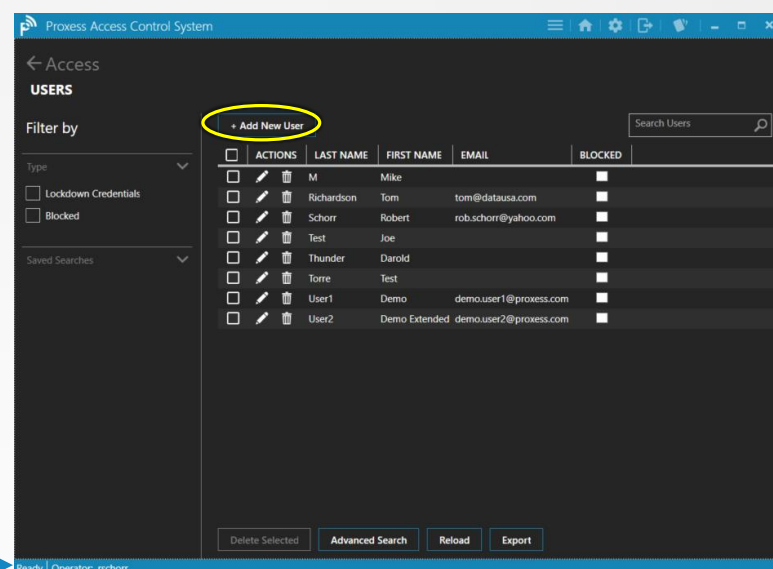
From the main Users screen you can edit, delete and block individual cardholders. The list can be filtered\sorted by checking one or both of the boxes on the left: "Lockdown" and "Blocked" and Users can be searched for by typing letters in their name in the Search box. Click "Add New User" to do so.
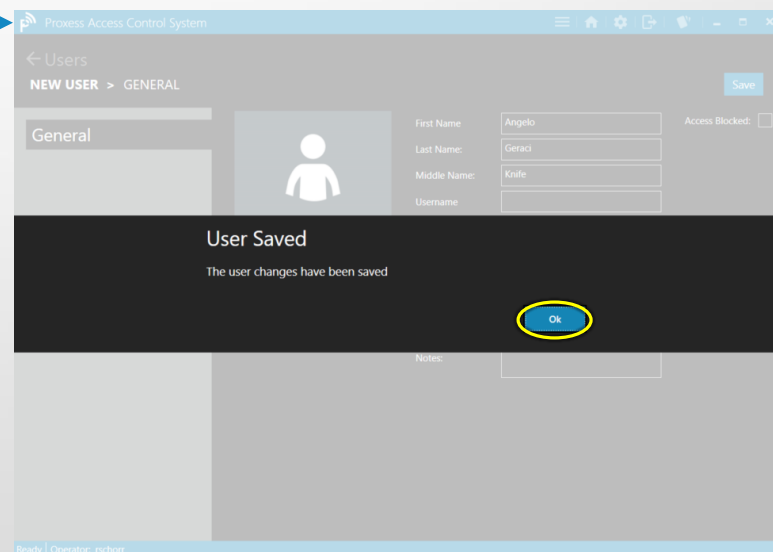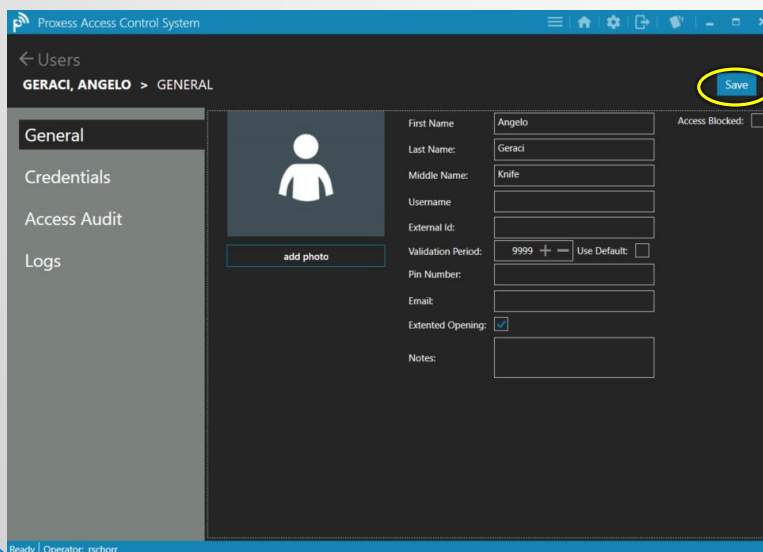
Add the essential new user information, including just their first and last name. Optional information includes the "Validation Period", the number of days a credential has to check-in at an online reader, before access is denied (leave this high for offline systems) and an Extended Opening checkbox, for the wheelchair bound, for example. The Pin is used if an online, wall-mounted reader\keypad is used in the system. The User Name and Email are only needed if this User will also be assigned software Operator rights. Click "Save" to continue.

Now that the new user has been saved, we can assign a card\credential to them. This can be done now, or anytime in the future, by returning to their record, going to the Users module and clicking on the edit icon for their name.

For now, click "Credentials" to proceed.

For this User, click "Add New Credential". As many credentials as desired may be issued to a User.

Select the Activation Date, which is usually left as the current date, but may be set at a future date. Select the Expiration Date of the card, which may be on an annual basis, by semester for schools, or at 90 days for evaluations of new hires. Select the Status of this credential and check the box if it is to be Blacklisted (disallowing access with the *credential*, as opposed to disallowing access of the *user*). You may give a "Name" to this card, such as Vehicle Tag, or Phone Sticker. If you wish to change the "Revalidation Date", return to the "General" tab after saving. Click "Save".

The rights for this credential to access various doors may now be selected. This is done by selecting one or more "Access Profiles" and\or one or more "Door Groups" and individual "Doors". These have been set up in their respective programming modules. Click "Add Access Profile", if desired.

To choose an Access Profile, click the dropdown arrow, or "Cancel" to return to the previous screen.

Select the desired Access Profile from the list and click "Apply".

To add a door for this credential to have access to, click "Add Door".

Click the dropdown arrow to select the first individual Door and then the Time Schedule for the credential to have access to it. Check the appropriate boxes to allow this credential to have First Person In rights, Use this door in a Toggle function, Pass Through\Enter a door that is in Lockdown mode and permit the credential to release a door in Lockdown. (?)

Click "Apply" to proceed, or "Cancel" to return to the previous screen.

Repeat this procedure for all the additional doors and Door Groups that this credential will have access to and then, as long as the new card is on the enrollment reader, click "Write to Card".
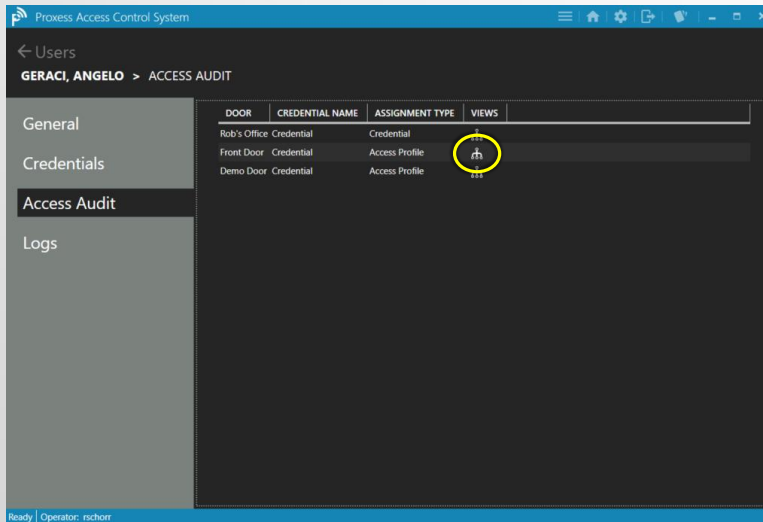

The "Stamped ID" of the card will now be shown towards the top of the screen, along with the selected Revalidation Date. Click "Save" (Necessary?) to complete the process.
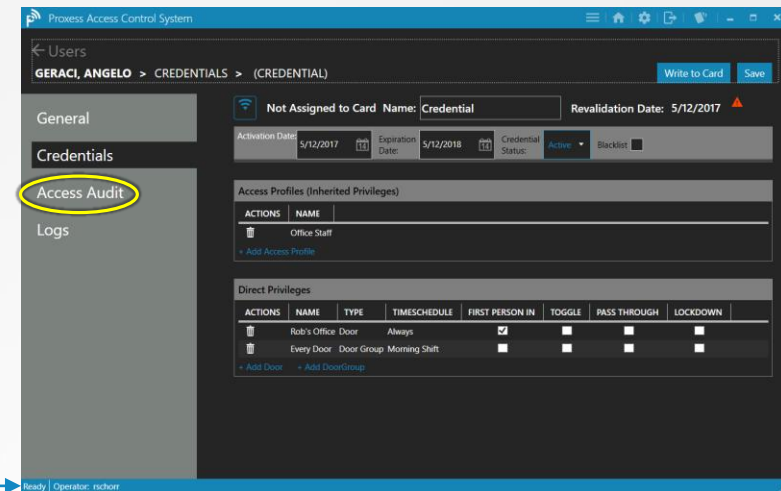The card programming process is now complete.
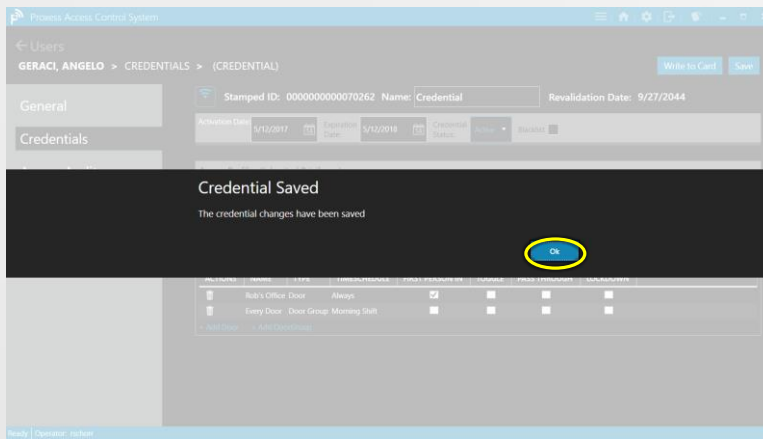
From the previous screen, this verification screen appears. Click "OK".
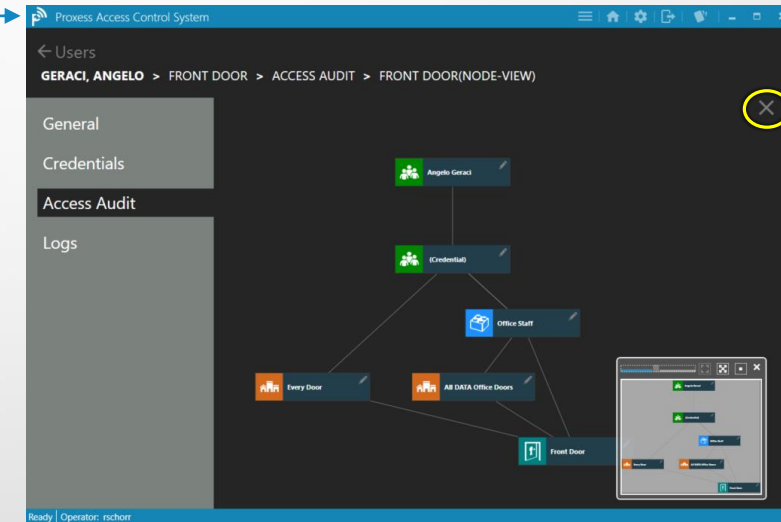

Though the credential programming is complete, we will now show a visualization what we have programmed, as it is listed above. Click on the "Access Audit" tab.

Each of the individual doors this Cardholder\User has access to will appear in this list. For any of the doors, click on its "Views" icon.


This Access Audit view shows the relationship between the cardholder and their credentials and the door selected on the previous screen.

The insert on the bottom right of the screen allows you to see the entire relationship tree and the slide bar at the top of this insert can be moved to widen or narrow the main screen view.

Click "X" in the top right to close this view and return to the list of doors.
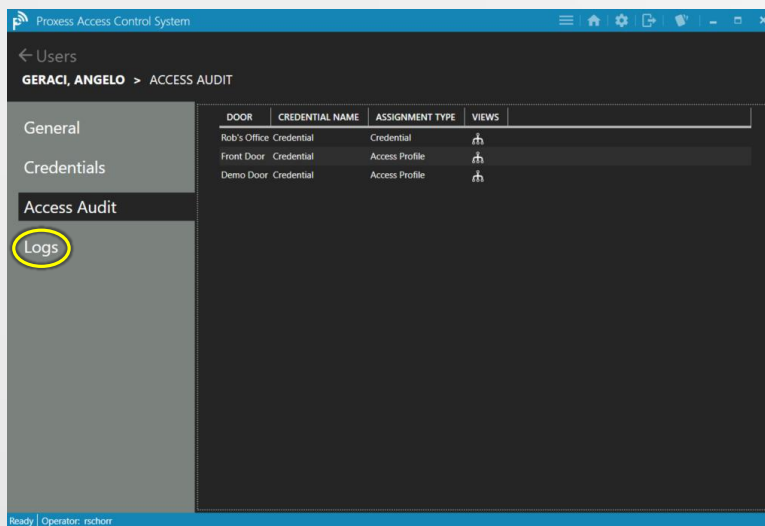
For a list of all of the recorded Events for a User, click "Logs".
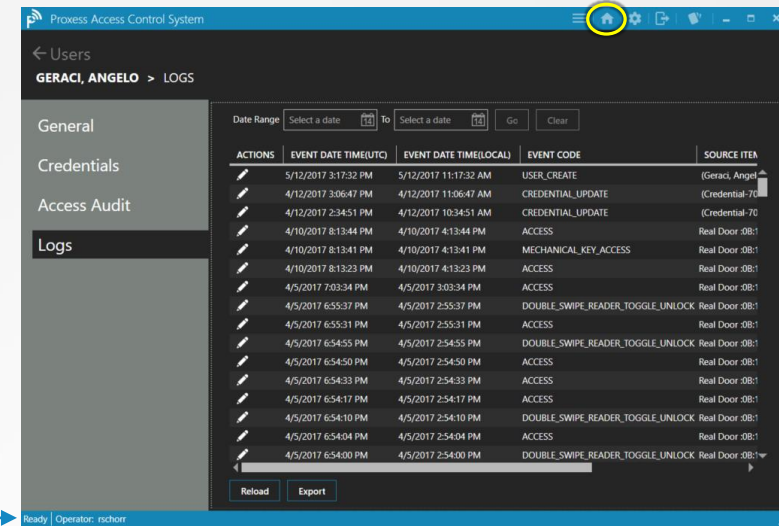
The Log lists every stored Event from that door. This list may be Exported as an Excel file by clicking the "Export" button at the bottom.

This list may be scrolled and may also be searched and shortened, by selecting a "Date Range" from the top of the page. Again, the resulting list may be Exported by clicking the "Export" button.

To return to the full list of Users, click "Users" at the top left.

To return to the Home Screen \ Dashboard, click the Home icon at the top taskbar.
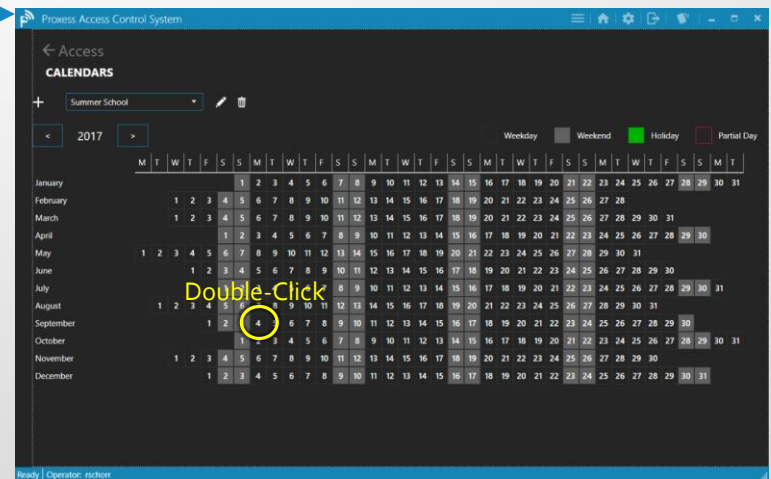
CALENDARS
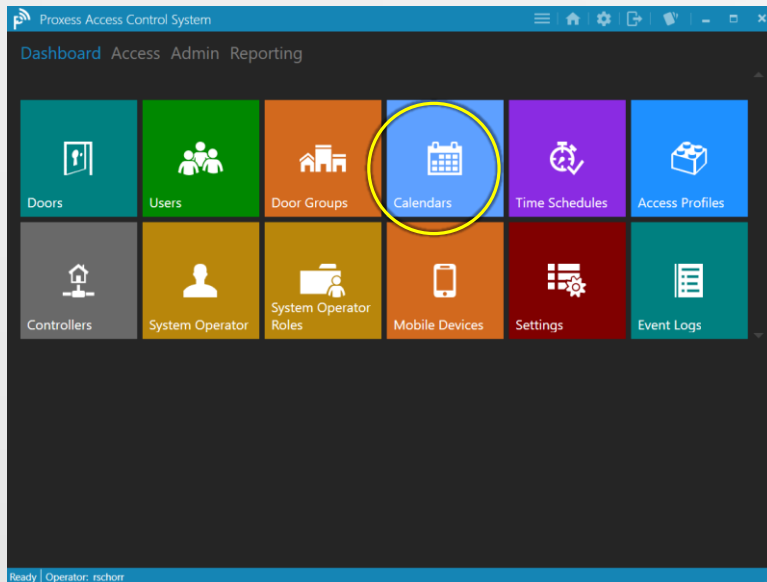
Click the icon for the "Calendars" module. Calendars are where you add traditional Holidays and other specialty days. Specialty days can be planned in advance (e.g. weddings at a church, sports games at a school) , or added on-demand (e.g. weather related event).
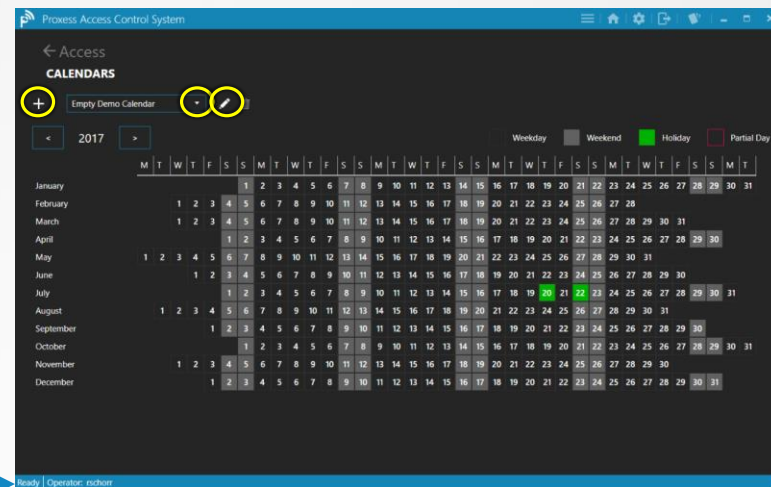
The Default calendar will appear, if this is a new system. Since a customer may have multiple locations, with each location abiding by different calendars, you may create multiple Calendars and apply a different Calendar to each lockset and door. Click the dropdown arrow to select a Calendar to view and the edit icon to do so. At this time click "+" to create a new Calendar.
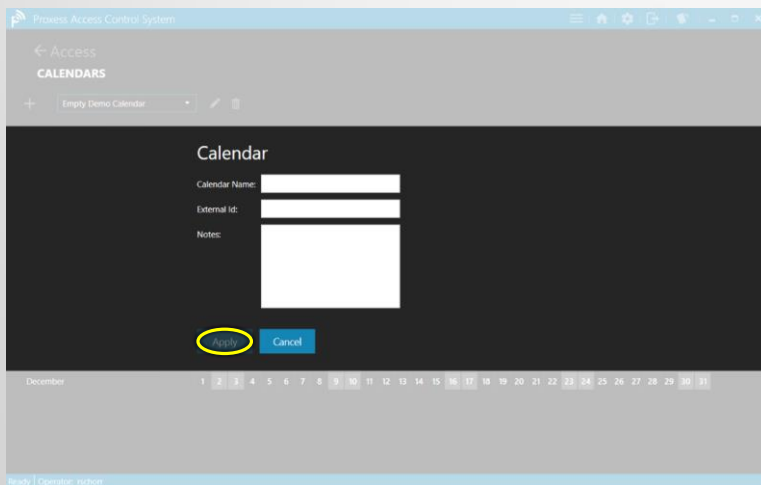
Enter the name for the new Calendar. This is the name that will appear in all the Doors selection screens. The External ID is optional and is an alternate reference that the customer may have. Enter any further notes you may have. Click "Apply" to continue.

The Calendar you just created appears. To begin adding days for a Door to operate\function differently than normal\programmed, click on any day for the current year that is displayed (2017 in this case). To add a Calendar Event, Double-click on any day.

The page to create a new Calendar Event appears. Enter the Event Name you want along with any optional clarification Notes. Select the Start and End days and times for this special Door operation to occur and click "Apply" to save this new event.

The new Holiday\Event now appears, highlighted in green. Note that a Holiday is the most common type of Event and is therefore the term used in the software and the two words are equal to this program. To view the detail of this Holiday\Event click on the green highlighted date.

The Holiday\Event detail appears at the bottom of the Calendar. To edit the Event, Double-click on the green highlighted date.

You can now make adjustments to the Holiday, or click "Cancel" to return to the previous screen and then click the Home icon on the top taskbar to return to the Home Screen \ Dashboard.

USER INTERFACE FLEXIBILITY
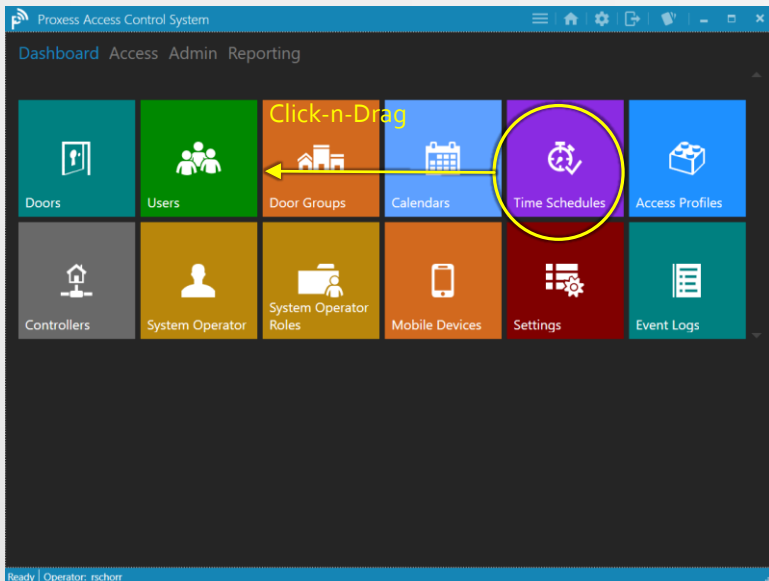
The Dashboard \ Home Screen \ User Interface may be customized in several ways. First, you may click-and-drag any module to another part of the screen, thus rearranging the module icons.

By clicking on the icon highlighted on the top taskbar...

...The file shortcut menu will appear and remain at the top of the page throughout the system, until you again click on the same icon on the top taskbar.
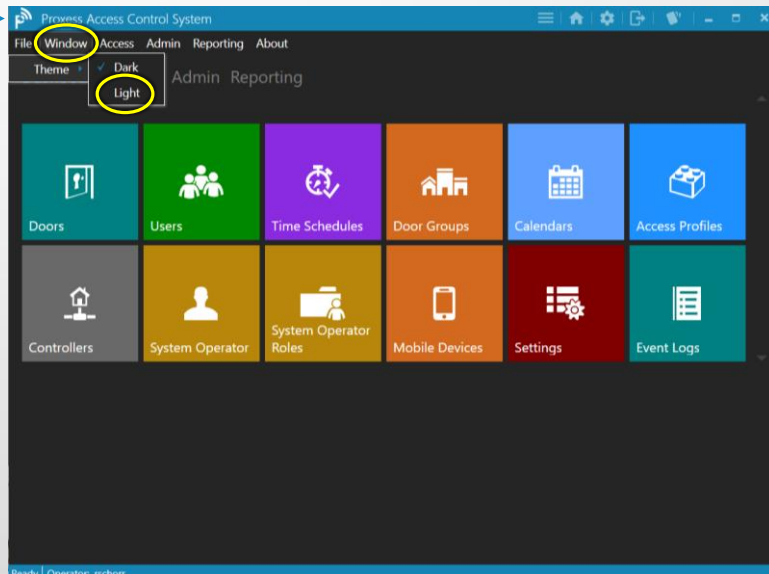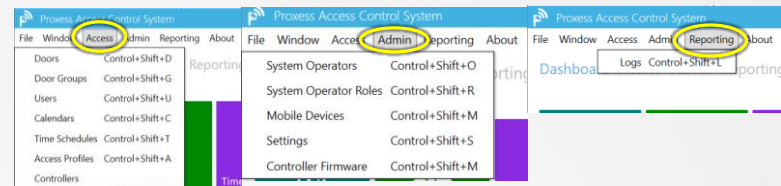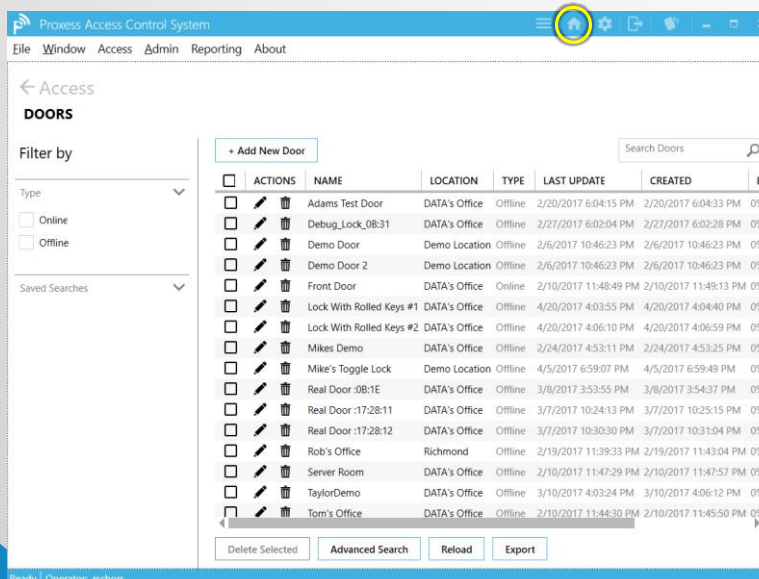
Click on the "Window" button, highlight "Theme" and then click on "Light".
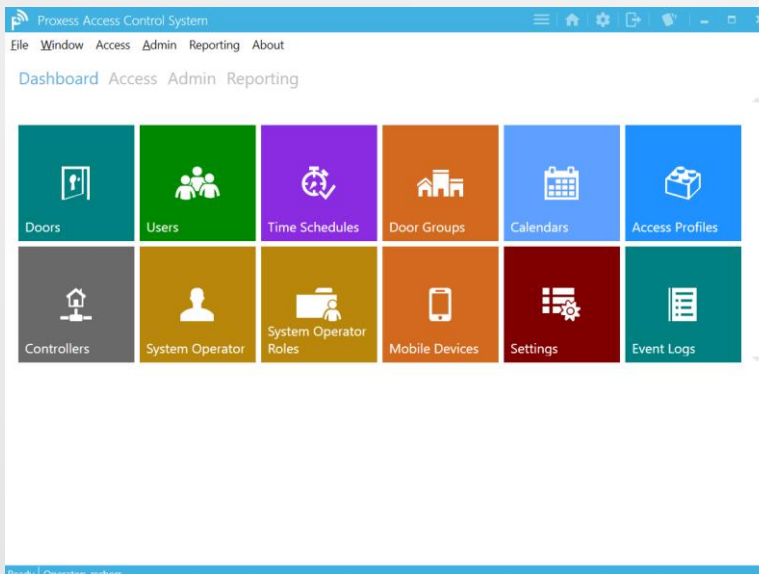
The screen background is now changed to white and will remain so throughout the system until the background is changed back to "Dark".

As an alternate to using the module icons on the Dashboard, the file shortcut menu can be used to quickly navigate from and to any other module with a single click.

The Home icon is used from any screen in the system to bring you back to the Dashboard \ Home Screen.
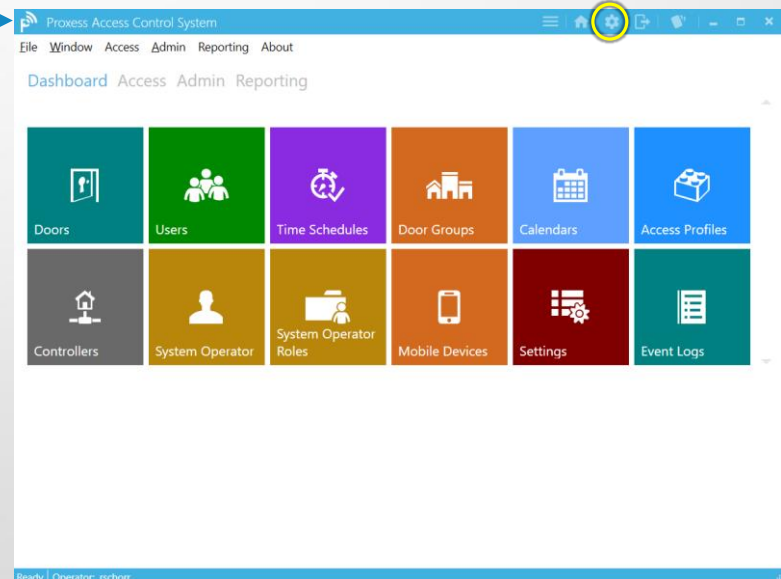
From any screen in the system, you can shortcut to the "Settings" module with a click on the icon shown in the top taskbar.
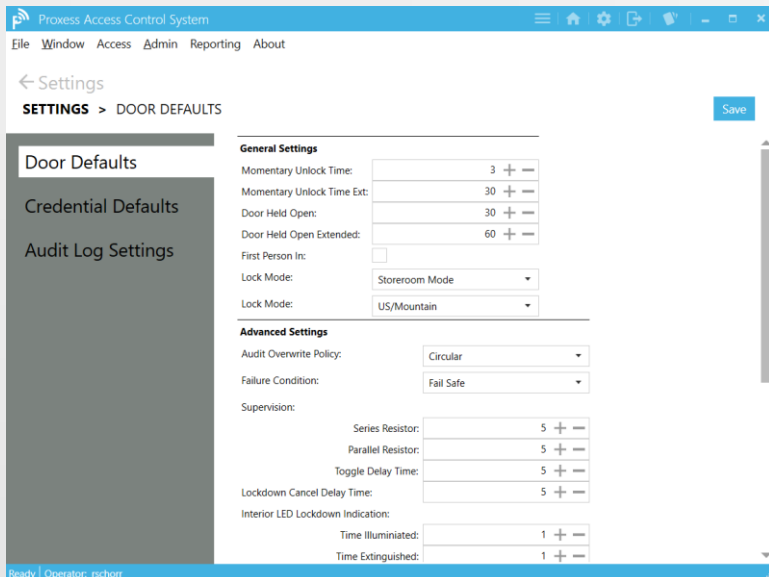
The "Settings" module opens. Now return to the Home Screen \ Dashboard.
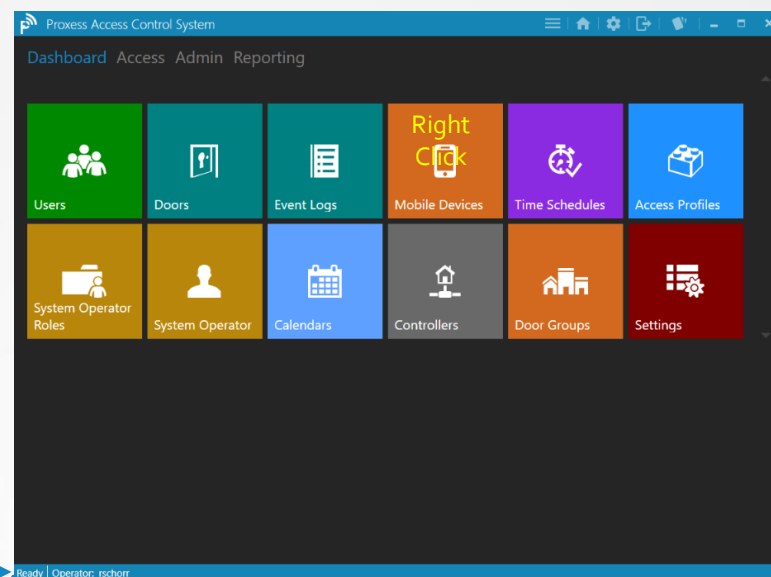
Right-click on a module icon.
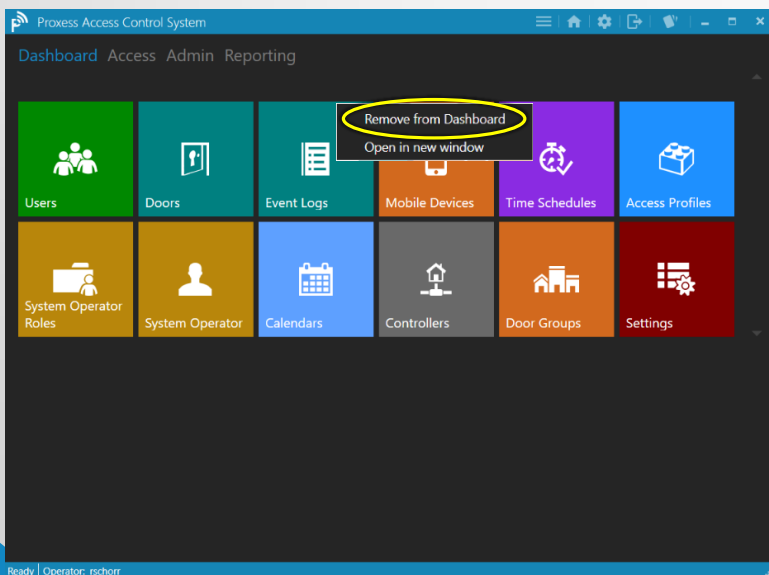
You may "Remove" the icon from the Dashboard or open it in a new window (Is this working right?).
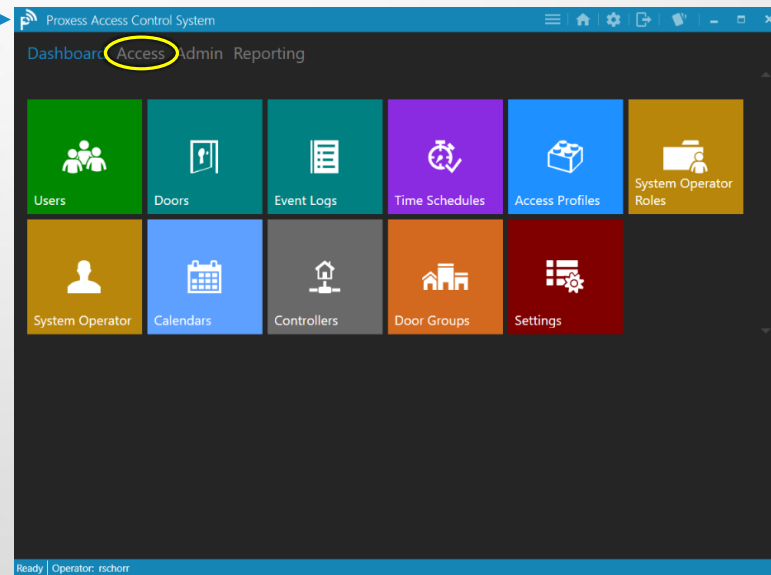
Click on "Access" in the top menu.

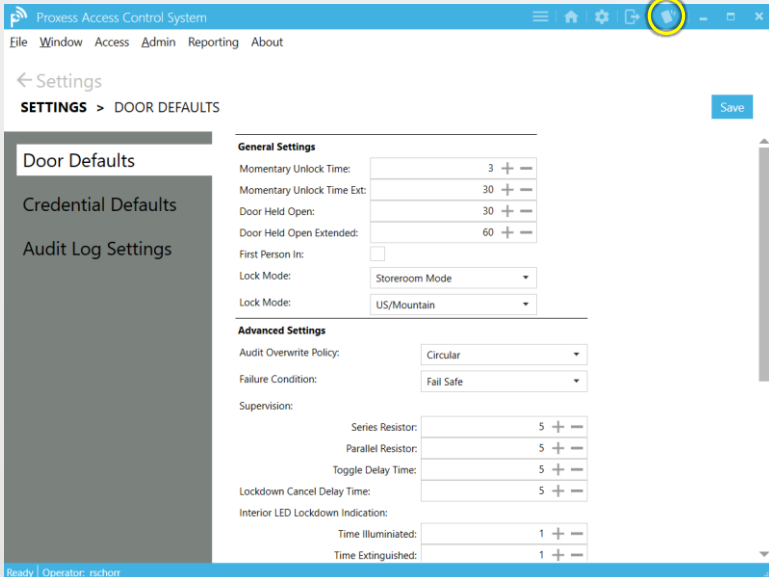These are the module icons that appear when you click on "Access".

These are the module icons that appear when you click on "Admin".
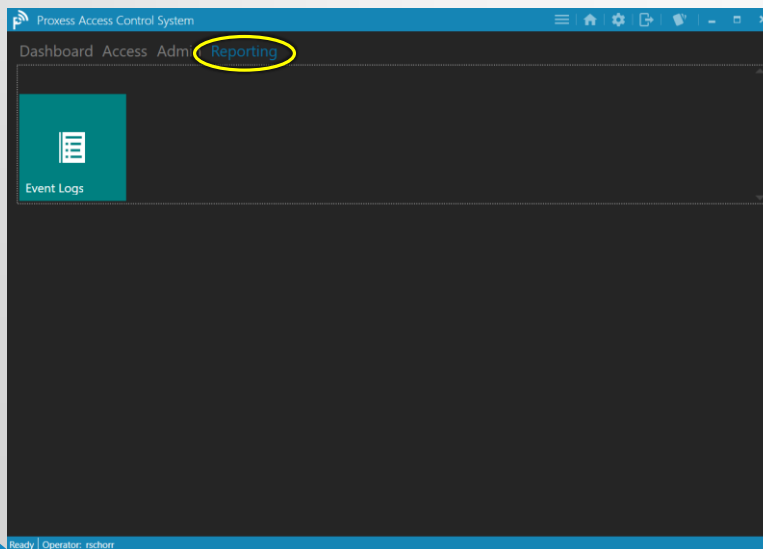
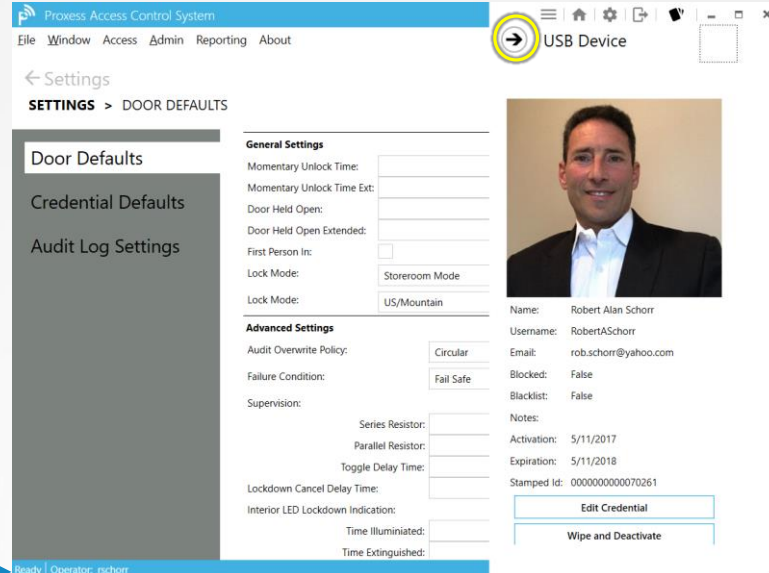These are the module icons that appear when you click on "Reporting".
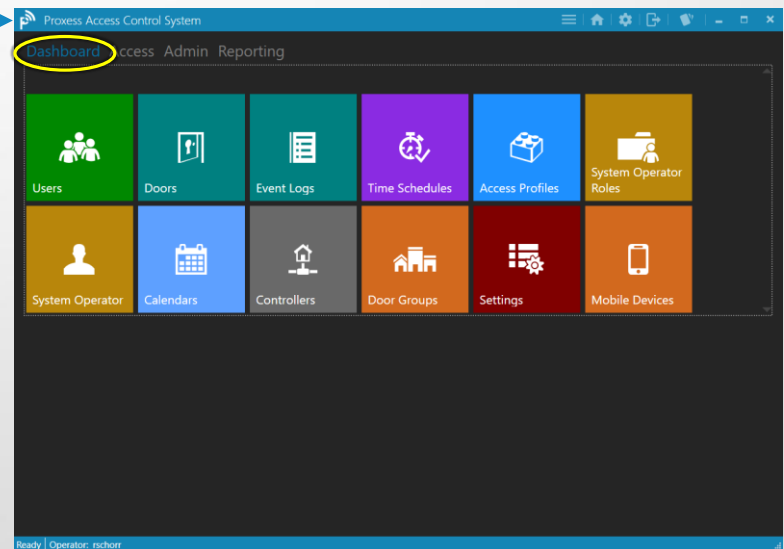
These are the module icons that appear when you click on "Dashboard".

From any screen in the system, click on the icon shown in the top taskbar

The most recent credential that was placed on the enrollment reader will pop-up.

USING the ENROLLMENT READER

The Pop-up Window

Go to any screen in the software
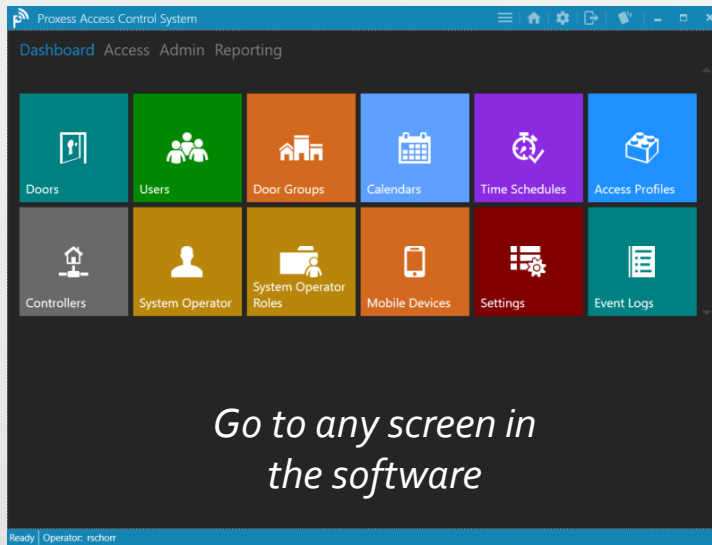
Place a new card on the enrollment reader

This pop-up window appears
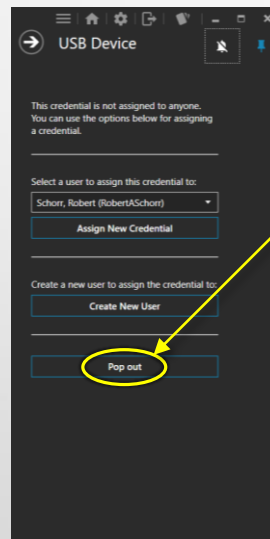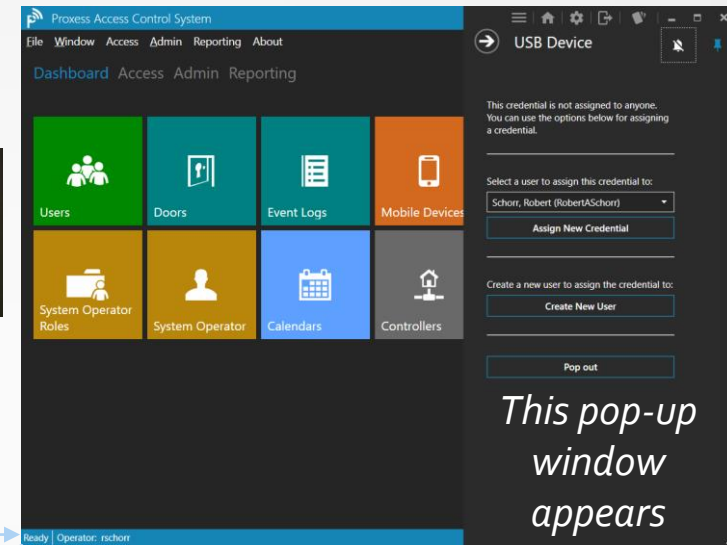
The pop-up window presents several options for the operator.

The operator may click the "Pop out" button, which will undock this window from the main ProxessIQ™ application. It may then be dragged anywhere on the desktop, so that the user can continue programming other screens in the ProxessIQ™ system and return their focus to the new card when they are ready.

At that time, the operator may leave the card on the enrollment reader and proceed with the process of creating or assigning this card.

Assign a Credential to an Existing User
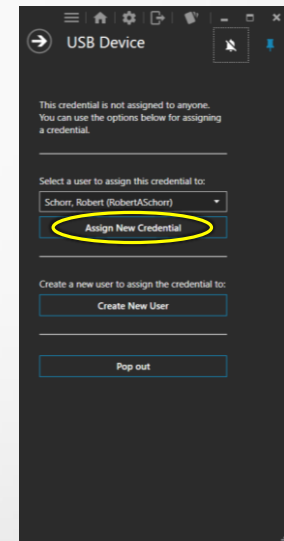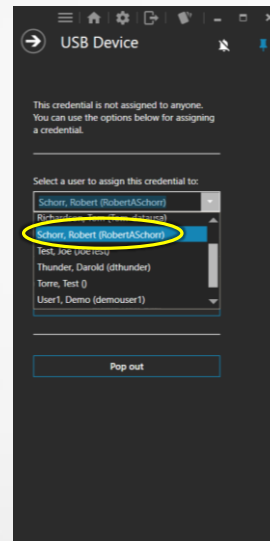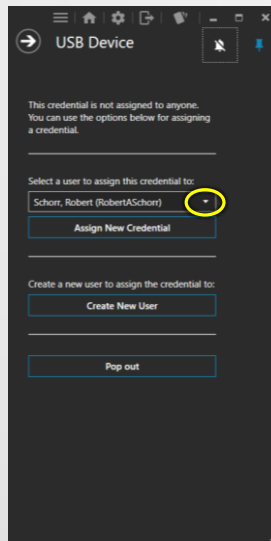
The Operator may assign the credential that is currently on the enrollment reader to an Existing User.

First, click on the drop-down arrow and then select an existing user\cardholder from the list. You may scroll down the list using the scroll bar, or begin typing letters of their name which will bring up all the matching results as you type. Select the desired name and then click on the "Assign New Credential" button to complete the task.

NOTE: Users may have more than one credential. The user selected may have only their information entered and this may have been the first credential assigned to them, or they may already have another credential.

Adding a New User
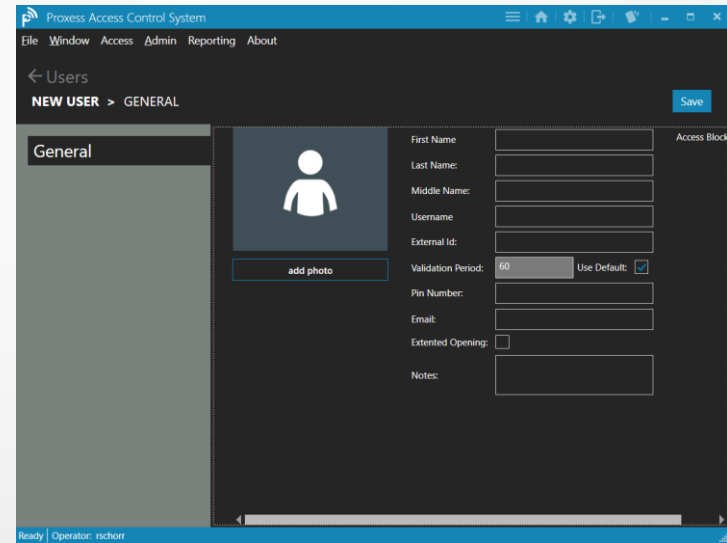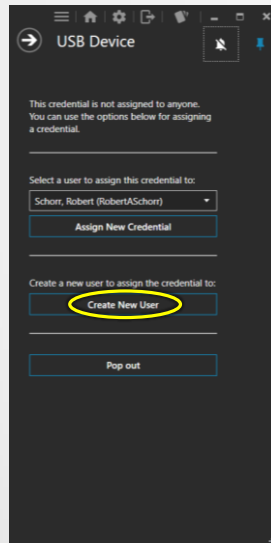
With the card on the enrollment reader, the Operator may create a New User record for it.

Click on the "Create New User" button and the new user information screen will open. We will cover the remainder of this process in the next section.

Whose card is this?
&
Deleting a Credential
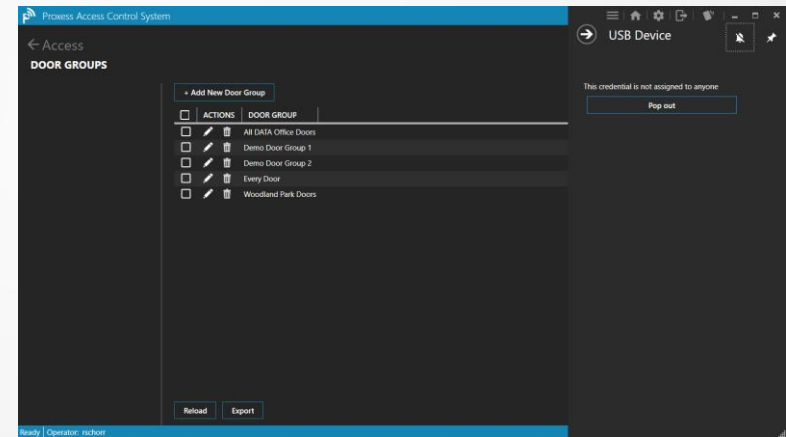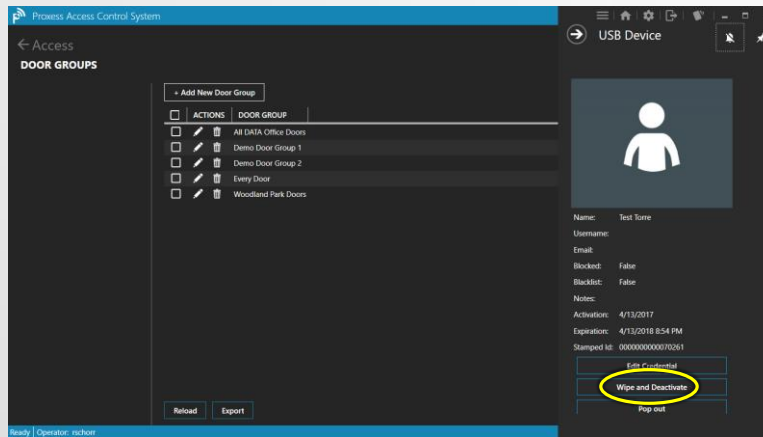
To find out who a card belongs\has already been assigned, place it on the enrollment reader while in any screen in the software.

The pop-up window appears along with their basic cardholder and card information which includes their stored photo. Three (3) button choices are also presented.

The operator may click "Edit Credential" to be brought to the edit screen for that user and may click "Pop out" to move the window freely on their desktop.

The operator may also decide to assign this credential to a new user or simply wipe the existing information off the card. To do so, click "Wipe and Deactivate".

The screen on the right will appear and the card is now free to be assigned to anyone.

Attempting to Enroll an Existing Card
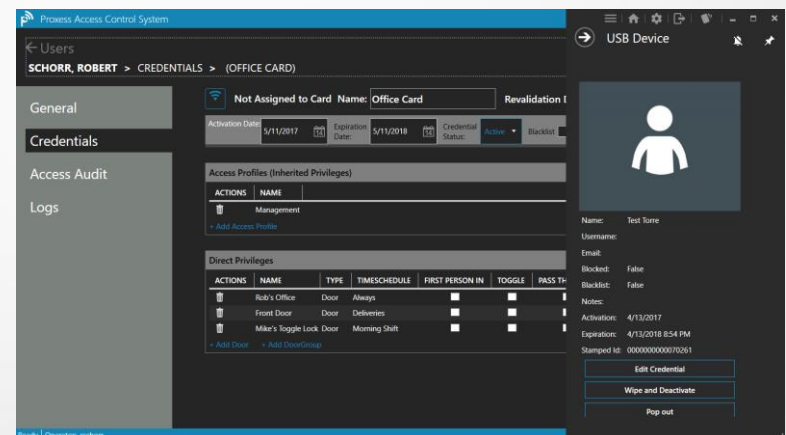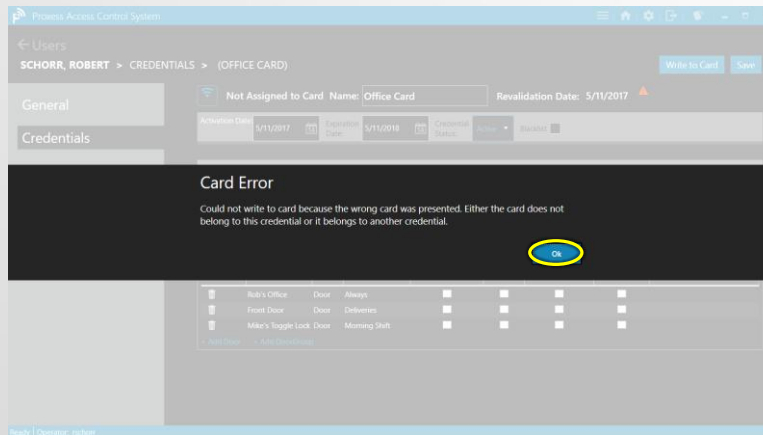
After a user has been added to the system, placing a credential on the enrollment reader and attempting to enroll or encode one that has already been programmed and assigned to someone else (from this system or any other system) will result in the above "Card Error" screen appearing.

From any screen in the system, click on the icon shown in the top taskbar

The most recent credential that was placed on the enrollment reader will pop-up.

Using the Enrollment Reader - 6

SETTINGS

These tabs show the default settings used throughout the ProxessIQ™ software. Each of them can be customized to your preferences, by site, reader, cardholder and operator.

Unless changed, all new devices (i.e. controllers, readers, …), operators and cardholders will be defaulted to the attributes on these tabs.

To change the default settings usage, you may either uncheck the appropriate box on these tabs (which will change all future defaults) or you may uncheck the individual box next to the field that you are configuring elsewhere in the software (which will affect only that device or person).