

# SOFTWARE MANUAL

ProxessIQ<sup>™</sup> Software & Proxess Sync<sup>™</sup> Mobile App Configuration

### Equipment & Operation: Start-up Guide

In preparation for the system software download and hardware installation & configuration:

Here are the minimum required components:

- Minimum Computer Spec (for each ProxessIQ<sup>™</sup> server and client), Windows 10+, Intel Core i5 2GHz, 1 USB input, 8MB RAM, 256GB free disk space
- ProxessIQ<sup>™</sup> software Download link: <u>www.proxess.com/downloads</u>
- USB Enrollment Reader
- Apple or Android Smart Phone
- Proxess Sync™ Download link
- Network or Internet connection for the PC, depending on the Proxess Sync<sup>™</sup> connection method
- Common WiFi connection to ProxessIQ<sup>™</sup>, or mobile plan with connection to the ProxessIQ<sup>™</sup> network
- 1 or more locksets
- Screwdriver to install lockset in cylindrical door prep, or also drill 5/8" hole for mortise lockset
- Proxess smart credentials (mobile phone, cards, stickers, fobs, watch)

It is strongly recommended to pre-install Microsoft SQL Express on the Server PC prior to downloading the ProxessIQ™ software.

Ports to be opened for client and IP controller communications:

- 8008-8011, 8031 & 8032
- Note: The IP Controllers/Gateways may be configured to communicate over ethernet and/or WiFi

Website URLs to be white-listed:

- Bi-directional communications for Mobile Keys: Outbound for initialization and changes and Inbound for audits and events: <u>https://pmcs.proxess.com</u>
- "Dumb" remote synchronization app, which can be enabled & disabled with a click in the software anytime that it is to be used: <a href="https://proxy1.proxess.com">https://proxy1.proxess.com</a>
- The back-up: https://proxy2.proxess.com

Email to be white-listed, for Mobile Key receipt:

DoNotReply@email.Proxess.com

## Quick Start Guide (Page 1 of 2)



• Software Installation: Instructions for downloading and installing the ProxessIQ<sup>™</sup> software; both server & clients.



• Licensing: Add and upgrade licenses for ProxessIQ software and Mobile Credentials/Keys.



**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 Apple or Android Mobile Phone.



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- **Time Schedules:** Create the days and times that locks and doors will operate with credentials and remain locked or unlocked.
- **Door Groups:** Create groups of Doors, for more easily assigning access rights to users.
- - **Doors:** Adding, programming & editing wireless locks and online doors.
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- **Doors:** *Controlling* Online & Bridged doors.
- Access Profiles: Create groupings combining Time Schedules with Doors and Door Groups.
- **Controllers:** Define online\checkpoint doors\readers.

## Quick Start Guide (Page 2 of 2)



- Users: Add\Modify\Delete credential holders and their PHYSICAL credentials (cards, keychain fobs, stickers, watches), including custom Advanced Searches.
- Users: Add\Modify\Delete credential holders and their MOBILE credentials (Apple & Android phones).
- Users: Mass-Adding\Modifying\Deleting Users & Credential using a .csv spreadsheet
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Encoding & Deleting: Using the Proxess Sync phone app to Encode & Delete credentials

Encoding & Deleting: Using the ProxessIQ Software to Encode & Delete credentials

- Calendars: Schedule Holidays and special events, years in advance.
- **Credentials:** Simpler management utility for credentials, after a User is created in Users menu, including custom Advanced Searches



• Notifications: Set Email alerts based on virtually any system event.



Do.

**Mobile Credentials:** Administrative management of Mobile Credentials (Issuance typically occurs in the Users menu).



- **Cloud Settings:** Communications management between ProxessIQ server and the Mobile Credential Cloud.
- Settings: Define system and operational attributes, including for door, reader, LED and credential operations.
- Logs: All User & Door event logs are available here and may be searched using multiple custom Boolean rules , with custom Advanced Searches.
- User Interface: Arrange and hide Module icons and UI color schemes.

# 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 configuration and data entry.

PC SPEC (minimum): Intel Core i5, 2GHz 8MB Cache **8GB RAM** 256GB Hard Drive

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

There is 1 (one) main computer (laptop or desktop) (laptop or desktop) used for OR 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.

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



Locate the download link provided at <u>www.Proxess.com/Downloads</u> or which has been emailed or otherwise provided to you by the Proxess support staff or sales team.

For basic and small-to-medium sized systems that choose to use the Proxess built-in "LocalDB" database (a Microsoft database product), you will install the file from the top section (in the version depicted below, 1.5.2.1) "ProxessIQ\_Server\_Installer\_LocalDB\_**Bundle**.exe".

This file will install both the server and client (system programming user-interface) applications onto the computer. This "bundle" can only be installed on one computer per system, but the Client download files can be loaded onto several other computers, which will be used as administration workstations.

Click on "Proxess-Server-Installer-LocalDB-Bundle.exe" and, if prompted, click on "Download" on the screen that opens.

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ProxessIQ <sup>TM</sup> Downloads	www.Proxess.	com/Downloads
ProxessIQ <sup>rac</sup> Client Installer Download: ProxessIQ Installer Client msi	ProxessIQ <sup>TM</sup> Client Installer	
Server Bundle with LocalDB Downl ad: ProxessIQ Server Installer LocalDB Bundle exe	Download: ProxessIQ.Installer.Client.msi	Note on Upgrading Versions:
Server Only Download: Proxess[O_Installer_Server msj	Server Bundle with LocalDB	When upgrading the version of your ProvessIO™ software, be certain to upgrade
Previous Releases	Downed de ProxessIQ Server Installer LocalDB Bundle exe	the server as well as all the clients to the same version, or there could be functions
1.4.15.1 Release ProxessIQ <sup>TM</sup> Client Installer	Download: ProxessIQ.Installer.Server.msi	that do not operate properly.
Download: <u>Processic Installer Client may</u> Server Bundle with LocalDB		
Download: ProzessiQ.Server.Installer.LocalDB1 fungle exe Server Only		
Download: ProxessIQ Installer Server me		

Note: 1.4 versions are for support of Legacy systems **Only** 

Alternatively, for systems where the server computer will Not be used as an administrative terminal, click on the 1.5.x **Server** file (instead of the Bundle). All the subsequent administrative workstations will have the Client file installed, as discussed above.

Per the previous page, click on "Proxess-Server-Installer-LocalDB-Bundle.exe" to begin the file download.

There are 3 automated wizards that will guide you through each the **download bundle**, the **server** installation and the **client** installations. At the completion of all 3, the Server program, ProxessIQ<sup>™</sup> Control Center will launch.

### This is the **Download Bundle** installation wizard:

Can't scan file for viruses × <sup>1</sup> Yrases.Server.Instiller.LocalDB Bundle see <sup>2</sup> (V3.3MB) exceeds the maximum file size that Google an each. That file might harm your compare, so only download the file if you understand the risks. CANCEL COMM.CAXD.AVYWAY	llow the windows that at appear on this page mputer's settings, som ay not appear and can	open and prompts . Depending on your ne of these windows be ignored.	Windows protected your P Windows Defender SmartScreen prevented an unro tight put your PC at risk More info	C cognized app from c.	Windows protected your PC     Windows Defender SmartiScreen prevented an unrecognized app from starting, Running this app might put your PC at risk.     App: Proxess Server.Installer.LocalDB.Bundle.exe Publisher: Proxess LLC
What do you want to do with Proxess.Server.Installer.LocalDB. From: doc-0s-44-docs.googleusercontent.com Proxess.Server.Installer.LocalDB.Bundle.exe is not commonly d and could harm your device.	Bundle.exe? Save Save Save	as Cancel X		Don't run	Run anyway Don't run
User Account Control Do you want to allow this app to make changes to your device?	The icon below may blink in	ProxessIQ Bundle Setup	e ×	ProxessIQ Bundl	e Setup – – ×
Proxess ACS Server (LocalDB Bundle) Verified publisher: Proxess LLC File origin: Hard drive on this computer	your computer's taskbar. If so, click on it to	Proxess End User License	Agreement		Proxess® ^ End User License Agreement
Show more details	proceed.		ER LICENSE AGREEMENT F OF ANY PROXESS® * ee to the license terms and conditions		OF THIS END USER LICENSE AGREEMENT VERN YOUR USE OF ANY PROXESS® *

Proxess Access Control Server Setup - 🗆 🗙	🛃 Proxess Access Control Server Setup - 🗆 🗙	🛃 Proxess Access Control Server Setup - 🗆 🗙
Welcome to the Proxess Access Control Server Setup Wizard	End-User License Agreement Please read the following license agreement carefully	End-User License Agreement Please read the following license agreement carefully
The Setup Wizard will install Proxess Access Control Server on your computer. Click Next to continue or Cancel to exit the Setup Wizard.	End User License Agreement (the "EULA" or "Agreement") THIS IS A BINDING LEGAL DOCUMENT. IF YOU DO NOT AGREE TO ALL TERMS, DO <u>NOT</u> CLICK "I ACCEPT" AND YOU WILL NOT BE PERMITTED TO ACCESS AND USE Proxess" PRODUCTS	End User License Agreement (the "EULA" or "Agreement") THIS IS A BINDING LEGAL DOCUMENT. IF YOU DO NOT AGREE TO ALL TERMS, DO <u>NOT</u> CLICK "I ACCEPT" AND YOU WILL NOT BE PERMITTED TO ACCEPS AND USE Proxess "PRODUCTS
Continue following the windows that open and the prompts that appear on this page.		
Provers Arcers Control Senier Setup	Provess Access Control Server Setun	Provess Access Control Server Setun
Proxess ACS Please select an install option	Proxess ACS Database Configuration: Using SQL Server 2016 Express or greater is reco	Proxess ACS Database Configuration: Using SQL Server 2016 Express or greater is reco
Choose new install if you are installing the product for the first time 'nand need to configure your system.	Use Local Database (LocalDB)) Set Database Path (ex:PRODSQL\SQL2012): DESKTOP-QU7CBG3\SQLExpr ProxessACS User Id:	Lyse Local Database (LocalDB)     Set Database Path (ex:PRODSQL\SQL2012):     (LocalDb)\MSSQLLocalDB     ProxessACS
Choose existing install if you already have a backed up configuration file and an existing database. This will skip all other configuration steps.	Password:	
Note: Only click "Existing" if you are upgrading the version of your ProxessIQ™ system.		
<u>B</u> ack Cancel	Back Next Cancel	Back Next Cancel

Click "New Install". Only click "Existing Install" if you are upgrading the current version of your system. Check the box to Use LocalDB and do not change the path that appears. Only set a different path if you have already installed SQL Express and will take responsibility for its maintenance.



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### Initializing the Server



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<sup>™</sup> icon on the keyboard or click on the Windows<sup>™</sup> icon on the left side of the Taskbar on the bottom of your screen. Locate and click on the "ProxessIQ<sup>™</sup> 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".

PROXESSIQ™ CONTROL CENTER	_ = ×
Server Status	Server Status
Server Settings Self-Signed Certificates Identity Server Config	Start Proxess Service Server Status: Server Version: 1.5 101
Service Configuration	Client Configuration
Certificate Bindings Active Directory Config	Get Client Configuration File Include Root Certificate Export
Active Directory Config Web API Config	Backup Utilities
	Create Local Database Backup Backup Server Config
	Logs
	View Server Logs Export Server Logs
	Additional Details
	Server Location: C:\Program Files (x86)\Proxess\Server\
	Database Server: (LocalDb)\MSSQLLocalDB
	Database Name: ProxessIQ

The above screen will open. If the Server Status is shown as "Stopped" then click on "Start Proxess Services".

ROXESSIQ™ CONTROL CENTER		-
S <mark>erver Status</mark> Server Settings Self-Signed Certificates	Server Status           Start Proxess Service         Stop Proxess Service	
dentity Server Config	Server Version: 1.5.2.101	
Service Configuration Certificate Bindings Active Directory Config Web API Config	Client Configuration	
	Get Client Configuration File Include Root Certificate Export	
	Backup Utilities Create Local Database Backup Backup Server Config	
	Logs	
	View Server Logs Export Server Logs	
	Additional Details	
	Server Location: C\Program Files (x86)\Proxess\Server\ Database Server: (LocalDb)\MSSQLLocalDB	
	Database Name: ProxessIQ	

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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.



**Note:** It is important to keep the Proxess Services Running at all times and especially to enable it to automatically start-up upon a restart of the computer.

	Initializing the Clie	nt	They Account Control	
tion	Recently added	Life at a glance	Do you want to allow this app fro unknown publisher to make chan device?	m an ges to your
tallat	ProxessIQ ProxessIQ Control Center	Tuesday	C:\Users\robsc\AppData\Local\Packa \Microsoft.MicrosoftEdge_8wekyb3di \TempState\Downloads \Proxess.Installer.Client.msi	ges Bbbwe
sul 1	モー ア Type here to search	Д. ———————————————————————————————————	Publisher: Unknown File origin: Hard drive on this computer	
ad &	Click the "Windows" icon on your co program and allow the app to make	mputer and select the "Proxess changes to your device.	IQ" Yes	No
oluv	Proxess Access Control System	_ = ×	I   ☑ I ♥   Client File Home Share View	- D
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<b>N</b>	Host:		Name Network Harbor	Date modified Type
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	Sonico Social Derte		Proxess 2 x86	1/23/2018 7:30 AM File folder
	Service Secure Port. 8011		Proxess PPT	12/13/2017 5:00 PM INSTALL File
	Service Order Land Control Con		Proxess.AxessIQ.Client	12/14/2017 10:57 AM Application
			Proxess.AxessIQ.Client.exe	11/22/2017 6:28 AM CONFIG File
5	Analy Climb Could		V SThis PC All Proxess.AxessIQ.CloudClient.exe	11/22/2017 6:28 AM CONFIG File
·+·	Appy client comig		> 3D Objects - Proxess.AxessiQ.LocalClient.exe	10/23/2017 6:18 PM CONFIG File
			> Desktop	9/5/2017 5:37 PM CONFIG File
			> B Documents	10/22/2017 8:02 PM XML Documen
			> Downloads	10/21/2017 12:00 PM Security Certifi
			b Pictures	
essIQ TA	NOTE: Other than as stated here, do no screen. If you have not yet pasted it into file folder you saved it in. Click on it.	ot make any changes to these sc the Client folder, you will be as	reens. Click the "Load Client Co ked to search for the Configurat	nfiguration" button c ion file, which may b
rox	On the next screen (below), click the "A The Login screen will open. Enter " <b>adm</b>	pply Client Configuration" buttc inistrator" and "proxess".	on.	
	Proxess Access Control System		Proxess Access Control System	= 1 4

NOTE: Other than as stated here, do not make any changes to these screens. Click the "Load Client Configuration" button on the first screen. If you have not yet pasted it into the Client folder, you will be asked to search for the Configuration file, which may be found in the file folder you saved it in. Click on it.

Security Certificate

		<ul> <li>Process Access Control system</li> </ul>	
Load Client Configura	ation		
Host:	DESKTOP-QU7CBGJ		
IdentityAuthorityUrl:	https://DESKTOP-QU7CBGJ:8008/core		
Identity Client Secret:	DyLzzdX_E%3k1%ioC*QqTVu		
Service Secure Port:			
Service Unsecure Port:			Proxess Log In
Bueld Encoded X309 Road Certifical	EF Immediate Constraints and the constraint of t		Defaults: User Name: administrator Password: proxess

You will now be prompted to change your password, which is strongly recommended, but not required.

One option is to get familiar with the software and configure it and get a second administrator trained before changing the default password.

Please do not take either of these options lightly and be certain to **SAVE YOUR PASSWORD** !! The ProxessIQ<sup>™</sup> software will now open.

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Set Password on are using is not secure. To ensure the security of your system please change your password now. Password: Verily Password: Verily Password:		Controllers	Users L System Operator	System Operator Roles	Credentials	Settings	Logs	Access Prohies	
Set Password Ignore and change later		Notifications	Cloud Settings						
		Ready   Operator: Administ	rator						

After installing the ProxessIQ<sup>™</sup> software, you may add the icon to your taskbar and\or desktop.

The following section will guide you through adding a License Key for ProxessIQ and for Mobile Credentials/Keys.



When prompted to provide a license file in a ProxessIQ<sup>™</sup> system and in order to add mobile credentials/keys to your system, a Proxess employee or authorized dealer will email a license package, as a .zip file.



The following instructions will show you how to download the .zip file and Extract and Save both files within it and note that location.

The first file we will address is the .lic validation and feature license for the ProxessIQ software.

This file may be added when prompted upon your login to the software, via this notification on the bottom bar of the software:

Processique   Processique     Cashboard     Access     Addition     Resentation     Resentation <th></th>										
Dashboard Access Admin Reporting CloudImage: Cloud Access Admin Reporting Cloud Access	ProxessIQ <sup>™</sup>							≡   ♠   🖸	[ <del>]</del>   Ø	$\times$
Image: State Notice N	Dashboard Acc	ess Admin Rep	orting Cloud							
Image: System Operator Roles	Doors	Door Groups	Users	Credentials	Calendars	time Schedules	Access Profiles	Controllers	System Operator	
	System Operator Roles	بن المعالم الم Mobile Devices	Settings	Logs	Mobile Credentials	Notifications	Cloud Settings			
Rock   Onester Administration Free Validation License										
	Ready Operator: Administr	at C : Error Validating Lice	ense							

Install the license file using the following instructions.

Click on the Menu ("Hamburger") button in the top bar of the software.





In the white menu items that appear, Click on "About".



#### Click "Licensing"



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(In a New Syste	em)			(Up
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#### Locate the file location you save the .lic file to and double click on it.

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Documents Zip_Exe Imports for ProxessIQ	Pic Qu RA	tures otes S	1	Scanned Documents Proxess Word Prezi	4 9 [9	Extra all
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★ Quick access	Nar	ne ProxessiO CloudTo ProxessiQ_License.	ken	Type Text Doct LIC File	ument	

Your ProxessIQ software will now be licensed with the attributes that were purchased and you can return to the program to continue programming your system.

The second file you extracted from the .zip will provide you information to enable mobile credential operation.

Locate the file location you save the .lic file to and double click on "ProxessIQ\_CloudToken".

	Extract	LicensePackage_		Co_4
File Home Share View	Compressed Folder	Tools		
Documents F P Zip_Exe C Imports for ProxessIQ	Pictures Quotes RAS	Scanned Documents Proxess Word Prezi	4 4 19	Extra
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← → × ↑ 🔢 « Dow → Lice	ensePa v ひ	Search LicensePackage_		Co_4-
	ame ProxessIQ_CloudToker ProxessIQ_License.lic	Type Text Docum LIC File	nent	

Allow this file to open in Notepad, or a similar program.

ProxessIQ_CloudToken - Notepad	-	
<u>File Edit Format View H</u> elp		
Display Name: Company ABC		
Host: https://pmcs.proxess.com		
MC ACS ID: cae43b59-77f9-44da-aac0-633779	6a7ea5	
Token: eKH2ojCC1KUv/Wdy9r2mxjgkH4mb01miWP	JkTj7Kc	94=

Once the data is entered, as explained below, your system will be provisioned with the number of mobile credentials your customer has purchased.

Future mobile credential purchases will simply be added by the Proxess support team in the cloud and applied to your system, without further action by the ProxessIQ<sup>™</sup> Operator.

From the ProxessIQ dashboard, click on Cloud Settings.



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Check the "Enabled" box.

Copy each line of text file (including all the special characters, but not any extra spaces) and paste them into the appropriate fields. Leave the "Forced Online" box checked.

Then click "Save and Synchronize" until "Synchronized" is shown.



You may now click the back arrow or the Home button and resume your system programming.

## Begin Programming ProxessIQ<sup>™</sup>

**NOTE:** The programming sequence from the Quick Start Guide (pages 3&4) will be the order followed throughout this operator manual.

Each module has dependencies on the previous modules, so attempting to configure a system out of this order may not be the most efficient, as it may result in the need to go back to the prescribed order to fill in various missing data entry fields.

### Opening the ProxessIQ Client Administrative Interface



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/Menu (the large icons) you wish to enter.

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### **OPERATOR ROLES**

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					-	-	Filter by + Add New Operator Role	Search
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Doors	Users	Door Groups	Credentials	Calendars	Time Schedules	Access Profiles	Active	er's Admin at Manager Level, under Administrator Level
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-4-		System Operator	) "	• • <b>1</b> 0x		Mobile		
Controllers	System Operator	Roles	Mobile Devices	Settings	Logs	Credentials		
		$\checkmark$						
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Notifications	Cloud Settings					÷		
							Delete Selected Advanced Search	Reload
Operator: Adminis	trator						Roady Operator rector	

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".

Proxess Access Control System		<b>A</b>	<b>\$</b>	G+ I	1	-	•	×
← Operators NEW OPERATOR ROLE > NEW				Crea	ite Op	erator	Role	
New	Role Name:							
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Ready Operator. Ischoff								

The following screen will open, for creation of the new Operator Role.

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.

Proxess Access Control System		📄 🚍 i 🏟 i 🥵 i 🚭 i 🖕 😐 🔺
← Operators NEW OPERATOR ROLE > NEW		Create Operator Role
New	Role Name: Main St. Elementary	
	Kole Description ProxylQ mobile App rights	
Ready Operator: rschorr		-

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.

Proxess Access Control System	≡ ♠ \$  ₽  ♥  - □ ×	Proxess Access Control	System	≡ (♠ (\$) [⊖  \$)  - □
← Operators		← Operators		
MAIN ST. ELEMENTARY > GENERAL	Save	MAIN ST. ELEMENTAR	RY > PRIVILEGES	
Role Name: Main St. Elementary		General	Door Module	O Manage O Read 💿 None
Role Description ProxyIQ mobile Ap	p rights	General	User Module	🗌 🔿 Manage 🔿 Read 🔵 None
Privileges		Privileges	Credential Module	Manage i Read 💿 None
			Access Profile Module	🔿 Manage 🔷 Read 💿 None
			Calendar Module	🔿 Manage 🔵 Read 💿 None
			Time Schedule Module	🔿 Manage 🔵 Read 💿 None
			Controller Module	🔿 Manage 🔵 Read 💿 None
			Mobile Programming Device Module	Manage 💿 Read 🔵 None
			Log Module	Read 💿 None
			Settings	🔿 Manage 🔷 Read 💿 None
Ince the new Role has been create	d click on the Privileges button	For each of th	a listad ProvessI∩™ sot	ftware modules click the
a define their medules and rights	a, elek on the r twieges botton	radia buttan f	ar the rights this Delay	vill have once an Operator
o define their modules and rights a	access.	with this Role	logs in. "Manage" allow	vs editing and "Read" only
		allows viewing	g within each module. C	lick "Save" when complet
	≡i∱i¢i⊖i¢i- • ×	Proxess Access Control S	iystem	≡ <b>!☆!</b> \$!\$!= □ >
		L A duration		

**OPERATOR ROLES** 

Filter by

Active

Inactive

+ Add New Operator Role

🖸 👱 🟛

口 / 市

Main St. Elementary

← Operators MAIN ST. ELEMENTARY				
Privileges				
	The role privileges have been saved			
	Settings	O Manage O Re	ad 🔘 None	

The above screen appears. Click "OK".

Operator Roles - 2

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.

Delete Selected Advanced Search Reload

DESCRIPTION

ProxyIQ mobile App rights

- Manager Customer's Admin at Manager Level, under Administrator Level

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

Proxess Access Control System		≡ 🔺 🗱	G•   🖤	– = ×
← Operators				
MAIN ST. ELEMENTARY > GET	NERAL			Save
	Role Name: Main St. Elementary			
General	Role Description ProxylQ mobile App rights			
Privileges				
Ready Operator: rschorr				

The Role you selected will appear. You may change any notes you wish. Click on the Privileges label to review those rights.

ANY ST. LELIVIENTAR					
eneral	Door Module	🔘 Manage	🔿 Read	None	
eneral	User Module	Manage	Read	None	
rivileges	Credential Module	Manage	Read	None	
	Access Profile Module	Manage	🔘 Read	None	
	Calendar Module	Manage	🔿 Read	None	
	Time Schedule Module	Manage	O Read	None	
	Controller Module	Manage	O Read	None	
	Mobile Programming Device Module	O Manage	Read	O None	
	Log Module		Read	None	
	Settings	🔿 Manage	O Read	None	

For each of the listed ProxessIQ<sup>™</sup> 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.



You will be returned to your Home Screen \ Dashboard.

								Coarch	
Filter by	+ A	dd Ne	w Ope	rator Role				Search	<u></u>
	<u> </u>	ACT	IONS	USERNAM	AE .	DESCRIPTION			
Activo		1	۵ ۲	Customer -	Manager	Customer's Admin at Ma	nager Level, und	er Administrator L	evel
	Ľ	4		Main St. Ele	ementary	ProxyIQ mobile App right	ts		

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





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.

Proxess Access Control System				<b>n</b> I	<b>\$</b>	G	1	-		×
← Operators NEW OPERATOR > REGISTER						Regist	er Nev	v Ope	rator	
Register	User Name: [ Password Verify Password									
	First Name Last Name Email:									
	Phone Number: Notes:									

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.

Proxess Access Control Syste	m						<b>n</b>   \$	[]+     <b>1</b>	¥   -	• ×
← Admin OPERATORS										
Filter by	(+ A	dd Ne	w Ope	rator			Sea	arch		Q
		ACT	IONS	USERNAME	EMAIL					
		1	Ŵ	Administrator						
Active		1	Ū	ahass	adam@datausa.com					
Inactive		1	Ŵ	bgrissom						
		1	Ū	dthunder	boomer@datausa.com			/		
		1		jtorre				/		
		4		mmalone			/	/		
		1	w m	rschorr			/			
		1		tricnardson	tom@datausa.com		/			
			W	tsenimiat	Searc typing their r will au	h for ai g the fii name. T utomat	n Op rst fe The r ticall	erato w lei esuli y apj	or by tters ting bear	of list
	Dele	ete Se	lected	Advanced	i Search Reload	Viewing 9 opera	ators			

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.

Proxess Access Control System			
← Operators NEW OPERATOR > REGISTER			Register New Operator
Register	User Name: [ Password Verify Password	rschorr	]
	First Name Last Name Email: Phone Number:	Robert Schorr rob.schorr@proxess.com 210-213-6475	
	Notes:	Solutions Architect, EAC	
Ready Operator: rschorr			h.

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.

Proxess Access Control System		. ≡   ♠   ✿   ⊕   ♥   - □ ×	Proxess Access Control System			🟫   🏟   🕞   📽   = 😐
← Operators RSCHORR > GENERAL		Save	← Operators <b>RSCHORR &gt;</b> GENERAL			Save
General	User Name: rschorr First Name Rob		General	User Name: rsø First Name	chorr	
hange Password	Last Name Schorr		Change Password	Last Name	Schorr	
	Email: rob.schorr@proxess.com			Email:	rob.schorr@proxess.com	
es	Phone Number: 210-213-6475		Roles	Phone Number:	210-213-6475	
	Notes: Solutions Architect, EAC			Notes:	Solutions Architect, EAC	
					L	
dy Operator: rschorr			Ready Operator: rschorr			
The details for the	Operator which you have	just registered will	Click on the Roles b	outton t	o assign this individu	al to a category o

Provess Access Control System				= .		<b>a</b> v 1	 - x	Ľ
Coperators							_	
General Change Password		NAME ProxessAdministrator	$\odot$	Add Operator To Role	2			
Roles								
	Remove Selected	]						
Ready Operator: rschorr								£

Password" to do so, or click "Save".

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. Process Access Control System

 Charge Password
 Customer - Manager

 Main St. Elementary

 Process Administrator

Select an additional or initial Operator Role to apply to this Operator.

rators									
<b>R</b> > ROLES									
al	Γ	Main St.	Elementary	y		Add Operator To Role			
41			ACTIONS						
e Password			<b>ā</b>	ProxessAdministrator					
			۵ ۵	Main St. Elementary					
		Remove	Selected						
	al e Password	R > ROLES	Remove	Remove Selected	A CTIONS NAME A CTIONS NAME C Password  Main St. Elementary  ACTIONS NAME C ProcessAdministrator Main St. Elementary  Remove Selected	ACTIONS NAME  Password  ACTIONS NAME  ProcessAdministrator  Main St. Elementary  Remove Selected	Add Operator To Role	Add Operator To Role Add Operator To Role ACTIONS NAME ProcessAdministrator Main St. Elementary Main St. Elementary	Add Operator To Role  Main St. Elementary Add Operator To Role  ACTIONS NAME ProcessAdministrator Main St. Elementary  Remove Selected

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".

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Seen Users	Der Grugs	Credentials	Carrenten	Tere Scheduler	Access Profiles
	Jorden Darreten Kenn	Mathe Deven	Settings:	Lage	Miller Dedenlah

You have returned to the Dashboard \ Home Screen.

Filker bu	+ Add		rator		Search	0
Filter by	- I	r New Ope				~
		ACTIONS	USERNAME	EMAIL		
		× 🖞	Administrator			
Active		/ 🗖	ahass	adam@datausa.com		
Inactive		🖍 🖞	bgrissom			
		🖍 🖞	dthunder	boomer@datausa.com		
		/ 🗇	jtorre			
		/ 🖬	mmalone			
		/ 🗇	MSEPrincipal	rob.schorr@yahoo.com		
		/ 🗴	rschorr			
		🖌 🗴	trichardson	tom@datausa.com		
		/ 🗇	tschmidt			

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.



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	ets Channel Manual				1.1 1				Ready Operator: Ischort	c 11		• •				
Ready   Operator Ischur	o add a	new (and	manage e	existing) i	mobile pl	none to be	e used	/	I his is the list	of all	the re	egistered	d mob	lle phone	: Apps	s in tr
o add a new (and manage existing) mobile phone to be used This is the list of all the registered mobile phone Apps in the	s an in-t	he-field n	rogramm	ina devic	e click or	the "Mol	bile		system, Click	hbA"	New	Mobile Г	Device	" to do so	. To r	etur
b add a new (and manage existing) mobile phone to be used an in-the-field programming device click on the "Mobile". This is the list of all the registered mobile phone Apps in the system. Click "Add New Mobile Device" to do so. To return									the Users Car		Deale					
b add a new (and manage existing) mobile phone to be used an in-the-field programming device click on the "Mobile unional" module ison	evices"	module ic	on.					/	the Home Scr	een \	νash	voara, ci	ICK ON	i either tr	ie Hor	me ic

Proxess Access Control System			≡   ♠   \$   G	×
- Mobile Devices New MOBILE DEVICE > GENE	ERAL			Save
General				<b>(!)</b> update required
	Name: Operator: Enabled:	I           Administrator           dthunder           jtorre           rschorr           ahass           trichardson		
				ACS Address: 127.0.0.1 ACS Port: 80
iy   Operator: rschorr				

Mobile Devices - 1

Enter a name for the mobile phone to be added. Select the responsible Operator for this App from the drop-down list.

Process Access Control System

Mobile Devices
New MOBILE DEVICE > GENERAL

General

Name:

Rob Moto G4

Operator:

Indoor

Fnabled:

ACS Address: 127.00.1
ACS Address: 127.00.1
ACS Port 10

the top task bar, or the "Access" tab at the top left of the page.

Check the Enabled box and click "Save".





A unique 2-dimensional bar code will be generated and displayed for use in the next module, "Mobile Phone App". Click "Save", though you may scroll down to view the other communications data.

	+ Ac	dd Nei	w Ma	bile (	Device				Search Mobile Devices	م
	וכ	ACT	IONS		NAME	OPERATOR	LAST SYNCED	ENABLED		
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(	ב	1	Ō	••••	Jon's 6P	jtorre				
		1	Ū.		DATA Nexus 5x	dthunder		<b>V</b>		

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.

#### Click "OK".

		≡  <b>≜</b>  \$¢ ⊡  \$¥  _ □ ×
Mobile Devices DB MOTO G4 > GENERAL		Save
eneral		C update required Last Synced: 5/11/2017 12:00:16 PM
Device	Communication Codes	_ ^
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Кеу Со	je:	
	Reset Communication Codes	
Proxy	iettings	<del></del> ;
Installa	ion Id: 99999876-1111-4e65-a065-00fd65531f18	
Naming	Convention: https://p{0}proxessproxy.azurewebsites.net/	
Is Dyna	mic:	
Preferr	d Proxies: 1, 2	
Mobile	Device Registration	-
Registe	red Device Id: 1dd624b7-3f5c-4d55-84ab-525139612cfd	
	Remove Mobile Device	<b>_</b>
		ACS Address: cloud1.proxess.com
		ACS Port: 0

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

# MOBILE PHONE APP Proxess Sync™ INITIALIZATION

This section will show you how to add your administrative phone app, Proxess Sync<sup>™</sup> to the system, for the purposes of initializing Bluetooth locks, exit trim devices and controllers.

It may also be used to program physical credentials

Have your Apple or Android phone ready.



### iPhone

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



For lockset communication, assure Bluetooth is turned on in the Settings app.

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



Click the Proxess icon to open the App.

Mobile App Screenshot



Allow the app to use the camera on your phone.



PC Software Screenshot



The app will open and ask you to confirm you will allow it to sue the camera on your phone. Confirm this and the above scanner image will open. Point your phone's camera to view the QR code that appears in the screen in the software when your new Mobile Device was added, shown in the image on the right.



=

Name

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.



Name this as the system you are connecting to.

At the bottom of the screen, you may click "Test Connection" to verify the setup was successful.

Click Done to return to the Proxess Sync<sup>™</sup> Home screen for this system.

**NOTE:** In order to assure the Test works, it is necessary to verify that the phone has connectivity to the ProxessIQ<sup>™</sup> 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.
3.25	11 2 22	3:52	11	÷ 🥠
≡	ACS Settings	=	Doors ISC West	Q
		Total doors: 40	Art Room Door	● ≯0
To connect	to your ACS:	Filter	Classroom Door 102	• *0
- Add a ne	w Mobile Device.	Unbound	Classroom Door 104	• *0
- Press "Se code on yo	can QR Code" below and scan the our screen.	Has updates	Classroom Door 105	• *0
	號 Scan QR Code	Locations	Classroom Door 106	• *0
-		Default Location	Classroom Door 107	• * 0
Name		Clear Filter	Classroom Door 108	• *0
ISC West			Classroom Door 109	• * 0
Com Code			Classroom Door 110	• *0
+^[_[P!e!#	≠>!j[%)		Classroom Door 111	• * 0
Key Code			Classroom Door 112	• *0
+^]_[J!Q[	+H?+:%;		Classroom Door 113	• *0
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3c28ebfe	-deab-4e65-b91e-aa1c16ba4e		Classroom Door 115	• *0
h.			Classroom Door 116	● ∦0
▼ Adva	nced Settings		Classroom Door 201	• *0
	T 10		Classroom Door 203	• * 0
	lest connection		Classroom Door 205	• *0
	Done		Classroom Door 207	• *0
			Classroom Door 208	* 0
			Classroom Door 209	• * 0

....OR.....

When you click Done, you will be brought to the Doors screen for that system. By checking the radio buttons on the left, you will cull the list to see only doors in a certain location, or doors that have not be bound or connected to this system.

ACS Settings       C         SC West       Art Room Door       8.0%         Sard Encoder       Unbound       Classroom Door 102       8.0%         Sard Encoder       Unbound       Classroom Door 100       8.0%         Classroom Door 100       8.0%       Classroom Door 100       8.0%         Sard Encoder       Unbound       Classroom Door 100       8.0%         Locations       Classroom Door 100       8.0%         Classroom Door 100       8.0%       Classroom Door 100       8.0%         Classroom Door 111       8.0%       Classroom Door 111       8.0%         Classroom Door 201       8.0%       Classroom Door 201       8.0%         Classroom Door 201       8.0%       Classroom Door 201       8.0%         Classroom Door 201       8.0%       Classroom Door 203       8.0%	3:53	•1	<b>○</b> ■	3:52		रे 🚺
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Click on Doors to bring you to the Doors screen.

3:25	<b>.</b> 111 🕏
ACS Sett	ings
To connect to your ACS: - Open the Proxess IQ cli - Add a new Mobile Devic - Press "Scan QR Code" code on your screen.	ent. ce. below and scan ti
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ISC West	
Com Code +^L[P!e!#>!j[%)	
Key Code +^]_[J!Q[+H?+:%;	
Installation Id	
<ul> <li>3c28ebfe-deab-4e65-b</li> <li>Advanced Settings</li> </ul>	91e-aa1c16ba4e.
Test Conne	ection
Done	
Succes	s

You may also click on the Menu/Hamburger button, which will take you to the overall Menu for Proxess Sync.



Click on Personal Settings to bring you to the that screen.

	Deere		Nearby Dears				Deem	
=	Assumption RCS	Q	Nearby Doors			=	Doors Rob's Leptop	Q
Total doors: 40	Art Room Door	• \$0%	Tot Unbound Lock (CE:0D:55:E5:59:21)	\$ 56%		Total doors: 24	Assumption Classroom 1	100%
Filter	Classroom Door 102	• *0%	FI Unbound Lock (CF:C8:85:F9:10:76)	\$ 58%		Filter	City Hall Cylindrical	60
Unbound	Classroom Door 104	• \$0%	5			Unbound	David's STC	60
Has updates	Classroom Door 105	• \$0%		2		Has updates	Director's Office	60
ocations	Classroom Door 106	• \$0%	Lo	80		Locations	Dog Wash	60
Default Location	Classroom Door 107	• \$0%		96		Default Location	H117 Tech Office	66
Clear Filter	Classroom Door 108	• \$0%		46		Assumption School	Infant Room	20
	Classroom Door 109	• \$0%		96		Apartments	KRIVT	20
	Classroom Door 110	• \$0%				City Hall	Lawrence Describe Desilations	
	Classroom Door 111	• \$0%		70	OR	Raleigh	Laurens Remote Building	0Q
	Classroom Door 112	• \$0%		96		UCANR 3	Lumberyard Main Entry	65
	Classroom Door 113	• \$0%				ICL Borden	Medical Cabinet Switch	65
	Classroom Door 114	• \$0%				Spectrum	Mr. F's Door	69
	Classroom Door 115	• \$0%				San Fran HQ	New Office Door	60
	Classroom Door 116	• * 0%				High School	Research Lab 4	96
	Classroom Door 201	• \$0%				U HS	Schreiver 124	60
	Classroom Door 203	● ≵0%				Clear Filter	SC FL1 North Corridor	60
	Classroom Door 205	● ≱0%					Seam CX 1	60
	Classroom Door 207	• \$0%					Steve's PH Corner Office	60
	Classroom Door 208	₿0%				*	Vaught Bldg 1 Perim 1	62
	Classroom Door 209	• \$0%	Done					

As an alternative to clicking on the Door name to initialize/sync it, Click on the Bluetooth icon and all the nearby doors will appear. The % indicates the Bluetooth signal strength of each lock. Place your phone near the front-facing plastic of the lock

10:48	🖬 I LTE 🚱	10:49		all LTE 🚮
Coors Assumption Cla	assroom 1	< Doors	Assumption Class	room 1
Address: CF Location: As Has updates: fal Lock bundle version: 7 Battery level: 98 Reader firmware version: 3.3 Lock firrmware version: 3.	::C8:85:F9:10:76 sumption School se !% ).9	Lock I Reader fir Lock fir	Address: CF:CE Location: Assum Has updates: false bundle version: 7 Battery level: 98% mware version: 3.0.9 mware version: 3.12	:85:F9:10:76 Iption School
Bluetooth	74%	Bluetooth	(	Communicating
Sync Get lock	info More		Cancel	
		Syn	c Get lock info	o More

So, from either screen view you wish, select a Door to connect with, ensuring you select the one with the greatest signal strength. For a first-time lock

\* 56%





## Android

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

> 🖾 🌗 😯 🔜 70° 🖄 Proxess Sync STATUS



For lockset communication, assure Bluetooth is turned on.

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



Click the Proxess icon to open the App.



🚺 🖓 🗷 70° 🖄 🔌 🔻 🖹 😰 20:53	🖾 🌒 😍 🗷 70° 🖄 🔺 👻 📓 20:53	🚥 🕸 🗘 🔟 🕕 🕼 🔺 🖄 🐨 🖹 23:20
Proxess Sync 🤃	Proxess Sync ACS Settings	Connect to ACS
STATUS SYNC DOORS	STATUS Lock Sync Settings	Directions
Status	Firmware	Interiorial In the ACS, add a Mobile Programming Device to a System Operator. Add the com code and key code below.
Last synced: Tuesday, May 9, 2017 11:19 PM	Last synced: Tuesda	SCAN QR CODE
There are 16 doors to update.	There are 16 doors to update.	Com code
		Key code
		Proxy installation Id
		Proxy naming convention
		Is dynamic

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.

🔤 🏟 🗘 🖾 🌓 😰 🖪 P 🕅 🕉 🐨 💌 📋 23:20			
Connect to ACS			
Directions In the ACS, add a Mobile Programming Device to a System Operator. Add the com code and key code below.			
Com code	Scant		
Key code	the QR code		
Proxy installation Id			
Proxy naming convention			

#### PC Software Screenshot



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.

📓 🚺 😯 62° <u>†</u> 🗷 🖄 🔺 ኛ 📉 🛔 11:32	📓 🕕 🖓 🗷 62° 🛓 🖄 🔺 🖓 👻 🛔 11:33
Connect to ACS	Connect to ACS
SCAN QR CODE	SCAN QR CODE
Com code	Com code
.2#=-)*!s>;;}l_y	.2#=-)*!s>;;}{_y
Key code	Key code
·····	
Proxy installation Id	Proxy installation Id
99999876-1111-4e65- a065-00fd65531f18	99999876-1111-4e65- a065-00fd65531f18
Proxy naming convention	Proxy naming convention
https://p{0}proxessproxy.azurewebsites .net/	https://p{0}proxessproxy.azurewebsites .net/
Is dynamic	Is dynamic
Preferred proxies	Preferred proxies
1,2	1,2 onTestConnectionComplete: success
TEST CONNECTION	TEST CONNECTION
⊲ O □	

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<sup>™</sup> 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 LOCKSET

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

**NOTE:** Bear in mind that Proxess Sync<sup>™</sup> is a passive and un-hackable App in that the programming is done only from the ProxessIQ<sup>™</sup> 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.

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Proxess Sync :	Proxess Sync :	Proxess Sync :
STATUS SYNC DOORS CREDENTIALS	STATUS SYNC DOORS CREDENTIALS	STATUS SYNC DOORS CREDENTIALS
Bluetooth is off	Bluetooth is off ENABLE	Status
		The ACS has changes
Status	Bluetooth permission request	Last synced: Friday, Feb 12, 2021 8:23 AM
The ACS has changes	Application wants to turn on	There are 2 doors to update.
Last synced: Friday, Feb 12, 2021 8:23 AM	Bluetooth. Allow?	There are 5 unbound doors.
There are 2 doors to update.		
There are 5 unbound doors.	CANCEL	
		< 0 □

To use the Proxess Sync<sup>™</sup> App to update locksets and gather their audit trail data to send to the ProxessIQ<sup>™</sup> 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<sup>™</sup> 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.

If the access control software has changes to be synchronized, that note will appear here.

#### Sync with the Access Control System

🕶 🔤 🛤 🔯 🗖 30° p² 🔌 🕸 🕕 "il 96% 🛢 8:48 AM	📾 🕅 💩 🛤 🔯 40° pề 🖪 🍉 🛪 💎 🖽 77% 🗎 10:10 AM	📾 🕅 🔯 pề sơ: 🖪 🌪 🗖 😲 🛞 🕏 "🗏 71% 🗓 8:18 AM	📼 M 💩 M 🔯 40° pề 🖪 🌪 🕸 💎 📶 77% 🖥 10:10 AM	📾 🛤 🙆 🛤 🔯 30° 🖪 🆻 ⊳ 🛞 🛡 📶 52% 🖥 7:30 AM
Proxess Sync :	Proxess Sync	Proxess Sync :	Proxess Sync :	Proxess Sync
STATUS SYNC DOORS CREDENTIALS				
Status	CLEAR SYNC HISTORY	CLEAR SYNC HISTORY	CLEAR SYNC HISTORY	Status
The ACS has changes	SYNC WITH ACS (PROXY)	SYNC WITH ACS (PROXY)	SYNC WITH ACS (PROXY)	Last synced: Thursday, Feb 11, 2021 3:21 PM
Last synced: Friday, Feb 12, 2021 8:23 AM	AUTO SYNC DOORS		AUTO SYNC DOORS	There is one door to update.
There are 2 doors to update.		Synchronizing Connecting		There are 6 unbound doors.
There are 5 unbound doors.				
		0% 0/100		
			Synchronize Complete	
	*	*	*	

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.

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Proxess Sync :	Proxess Sync	$\leftarrow$ Engineering Manager :	← Engineering Manager :
STATUS SYNC DOORS CREDENTIALS	STATUS SYNC <b>DOORS</b> CREDENTIALS	Name Engineering Manager	Name Engineering Manager
Status	Filter Boat Docks	Address 00:A0:50:08:1C:0B Lock Mode Office Mode	Address Lock Mode Office Mode
Last synced: Thursday, Feb 11, 2021 3:21 PM	Has updates Engineering Manager	Has updates True Bundle versions update:1	Has undates. True
There is one door to update.	Default Lacetion		Be sure to reset the lock when connecting for the first time
There are 6 unbound doors.	Washington, DC	CONNECT	Connect via Bluetooth
	Long Island		(¢) 🔧 👜
	Lake Haptong Pete's House O'Potatoes		Sync Reset Firmware
	Lock Mode Construction Software Team		Info
	Storeroom Mode		DONE
	Office Mode		DONE
	Privacy Mode		
	FILTER		
< 0 □			

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 "Connect" and then "Sync" on the following screen. Stand close to the lock so that the lock with the highest signal strength % is in front of you. Click on that Available lockset.



The status bar will appear and then the *Synchronization Complete* bar will appear. The configuration is complete and you may return to other screens in the App or connect to it again to update the firmware.

#### Automatically Sync with all (desired) Locksets

19 Locksets - ,	<b>t</b>	Automatica	Illy Sync with all	(desired) Locks	ets
ati	📾 🖗 🖗 🔯 40° pề 🖪 🍃 🖇 👻 "1177% 🕯 10:10 AM	<ul> <li>▲ ● ● ▲ ○ ● ▲ ○ ● ▲ ○ ● ▲ ○ ○ ■ ○ 23:19</li> </ul>			
bd	STATUS SYNC DOORS CREDENTIALS	Finding available devices	Connecting to Lakeside.	Finding available devices	STATUS SYNC DOORS CREDENTIALS
2	CLEAR SYNC HISTORY	Synced doors	South	Synced doors	CLEAR SYNC HISTORY
M	SYNC WITH ACS (PROXY)	Cyneed doora	Synced doors		SYNC WITH ACS (PROXY)
Ę	AUTO SYNC DOORS			Lakeside, South updated: 02/10/21 10:06 AM	AUTO SYNC DOORS
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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 2<sup>nd</sup> (second) image will be shown as the App begins looking for locksets. The App will automatically begin the handshake, verification and update process when the 3<sup>rd</sup> image appears, usually within about 20 feet of a lock. However, it is highly recommended to remain close to a lock for it to sync quickly and completely, which is not just more reliable, but will also help to reduce the battery usage on the lock. 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.

When complete, click the back arrow at the top of the screen to return to the main menu.

NOTE: During the update process, audits will be collected from the locksets and as long as there is connectivity to the ProxessIQ<sup>™</sup> software, those audits will be uploaded to the software and will be immediately available in the system Event Log. Otherwise, you will need to tap "Sync with ACS" again to push the audits to the software.

#### 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.



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Proceed to the selected door and click "Connect" and the "Sync". The App will automatically begin the handshake, verification and update process. This can be accomplished, usually within about 20 feet of a lock. However, it is highly recommended to remain close to a lock for it to sync quickly and completely, which is not just more reliable, but will help to reduce the battery usage on the lock. The status will display as above. Click "Done".

Manually Sync with a Specific Lockset (2 of 2)

NOTE: During the update process, audits will be collected from the locksets and as long as there is connectivity to the ProxessIQ<sup>™</sup> software, those audits will be uploaded to the software and will be immediately available in the system Audit Log. Otherwise, you will need to tap "Sync with ACS" again to push the audits to the software.

# MOBILE PHONE APP LOCKSET SETTINGS, FIRMWARE UPDATES & LOGS For both Apple & Android phones

### Firmware Updates for Locks, Readers & Controllers

11:21		•11 LTE 🐝	11:21		. II LTE 🐝	11:21	all LTE 🐲	11:24	.III LTE 👀	10:48	•1   LTE (	<b>(</b>	11:22		🚛 5G 🚮
=	Firmware Rob's Laptop		≡	Firmware Rob's Laptop		= Firmware		Firmwan Rob's Laptop	e	≡	Doors Rob's Laster	Q	C Doors A	ssumption Classroom 1	
Rob's Laptop Select/Edit Confi	guration					Lock (3.0) Reader Module - 3.1.0     Lock (3.0) Interior - 3.1.4		Lock Firmware - 3.1.4 Lock Reader Module - 3.1.0	1	Total doors: 24	Assumption Classroom 1 City Hall Cylindrical David's STC	%(0) %	Ha Lock bung	Address: CF:C8:85:F9: Location: Assumption S as updates: false dle version: 7 ttop:/www.p8%6	10:76 School
Doors Cord Encodor						<ul> <li>MinilQ Firmware - 3.1.2</li> </ul>	*			Has updates	Director's Office	60	Reader firmwa Lock firmwa	are version: 3.0.9	
Personal Settings	5									Locations	Dog Wash	60	Bluetooth		70%
AC3 Settings										Default Location     Assumption	H117 Tech Office	60	Sync	Get lock info 🤇	More
Firmware										School Lumberyard	Infant Room	60			
										City Hall	KB VT	89			
										Raleigh	Laurens Remote Building	89			
										UCANR 3	Lumberyard Main Entry	99			
										ICL Borden	Medical Cabinet Switch	60			
										Spectrum	Mr. F's Door	60			
										High School	New Office Door	60			
										Hs	Research Lab 4	60			
										Clear Filter	Schreiver 124	80			
							_			Clear Filter	SC FL1 North Corridor	60			
						Show latest stable versions					Seam CX 1	89			
			Do	ownload from web		show legacy versions		Download from	m web		Steve's PH Corner Office	62			
				Load from file		Show local		Load from	file		Vaught Bidg 1 Perim 1	69			
		_	-				_		_		valiant Rida 1 Perim 2	013			

In Proxess Sync, click on the Menu button and then "Firmware" and then "Download from web". For a lock, download both the "Lock Interior" and "Lock Reader Module" files. They will show as loaded onto the phone. Click on the Menu button and click on the door/lock you want to update. Click "More" and then "Firmware". Select the first of the two firmware files and watch the update progress and then repeat the firmware update for the second file.

Finally, click "Reset and rebuild bundles" and watch the reset progress. The lock will be Reset and is upgraded. Go back to the Doors screen.

	11:22	i 5G 📢	11:23	. 11 LTE 🗱	11:23	att LTE 👀	11:27	•11 5G 🕪	11:27	<b>.11</b> 5G 🐲	11:28		.11  5G 🐝
	Coors Assumption Classroom 1		C Doors Assumption C	lassroom 1	C Doors Assumpt	ion Classroom 1	C Doors Ass	Imption Classroom 1	< Doors	Assumption Classroom 1	C Doors As	sumption Classroom	1
	Address: CF:CB:85:F9:10 Location: Assumption Sch Has Updates: false Lock bundle version: 7 Battery level: 98% Reader firmware version: 3.0.9 Lock firmware version: 3.1.2	:76 iool	Address: C Location: A Has updates: fa Lock bundle version: 7 Battery levei: 9 Reader firmware version: 3 Lock firmware version: 3	F:C8:85:F9:10:76 ssumption School alse 18% .0.9 .1.2	Addre Locati Has updat Lock bundle versi Battery lev Reader firmware versi Lock firmware versi	ess: CF:C8:85:F9:10:76 on: Assumption School es: false on: 7 vel: 98% on: 3.0.9 on: 3.1.2	, L Has i Lock bundle Batte Reader firmware Lock firmware	Address: CF:C8:85:F9:10:76 ocation: Assumption School updates: false version: 7 ry level: 98% version: 3.0.9 version: 3.1.2	Lock b Reader firr Lock firr	Address: CF:C8:85:F9:10:76 Location: Assumption School Has updates: false undle version: 7 Battery level: 98% mware version: 3.0.9 mware version: 3.1.2	Ha Lock bund Ba Reader firmwa Lock firmwa	Address: CF:C8:85:F Location: Assumption s updates: false le version: 7 ttery level: 96% re version: 3.1.0 re version: 3.1.4	-9:10:76 n School
	Bluetooth	72%	Bluetooth	Communicating	Bluetooth		Warnings		Warnings		Bluetooth		
	Sync Get lock info	ess	Canc	el	G	Success	This lock is not yet we need to reset the	configured (or has been reset), but the bundles on the ACS to	This lock is r we need to r	not yet configured (or has been reset), but reset the bundles on the ACS to the lock		Success	
	Unbind	2	Sync Get lock	cinfo Less	Sync Ge	Eirmware	Reset and rebuild	I bundles	Reset and r	rebuild bundles	Sync	Get lock info	More
			Unbind	Firmware	Onbind	Timware	Bluetoour	78%	Bluetooth	Communicating			
11:04	1177 (12)						Sync	Get lock info More		Cancel			
= 50	mware								Sync	Get lock info More			
- Rit	b's Laptop												
Lock Firmware - 3.1.4	) 1												
Lock Reader Module - 3.1.0	î												
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iPhone

## Android

### Sync Settings

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Proxess Sync 🔅	Proxess Sync ACS Settings	Lock Sync Settings
STATUS SYNC DOORS CREDENTIALS	STATUS SYNC Lock Sync Settings	Pull audits during lock sync
Status	Firmware	Delete audits after pull
Last synced: Thursday, Feb 11, 2021 3:21 PM	Last synced: Friday, F Export Log	
There is one door to update.	There are 2 doors to App Info	
There are 6 unbound doors.	There are 5 unbound doors.	
		4 0 5

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.





There are two (2) sets of firmware on each lockset, one for controller operations and one for the reader PC board. Note: For the Cylindrical locksets, only download the Lock Firmware file. For the Mortise locksets, only download the Mortise Firmware file. The reader module firmware is the same for both Cylindrical and Mortise locksets. To retrieve the latest versions, click the 3-dot icon highlighted above and then select "Firmware". If the file(s) you need have already been downloaded to the phone (as they will be shown in the above list), then you may just click on it to begin the download process to the lockset (only one file at a time may be downloaded). Once you are done with the firmware, or if there is an obsolete firmware shown in the list, you may press and hold that item and tap "Yes" when asked to delete that firmware version.

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### Lockset Firmware Downloading -From Web & Device



On the Settings-Firmware page, you may load firmware onto (the proper folder in) your device from either the Proxess website, or your device. To load firmware from the Proxess website, just tap "From Web" and the available firmware (that is Not already on your device) will be listed. If allowed, you will be able to tap and select a Beta version. Tap (one at a time) each of the firmware files you need and they will automatically download onto your phone and will then appear in the list.

On the Settings-Firmware page, to load firmware onto the proper folder in your device from a general file folder on your device (You may have received the firmware as an email attachment, for instance), tap "From File". Tap (one at a time) each of the firmware files you need and they will automatically download onto your phone and will then appear in the list.

#### Lockset Firmware Downloading (Execution)



: ← Firmware Load Firmware Name Lakeside, South From Web From File Address D2:43:AE:1B:F9:8D Lock Mode Privacy Mode Lock Firmware - 3.0.1 Has updates True Bundle versions update:1 lock:2 Lock Firmware - 3.0.2 Battery level 100% Reader firmware version 3.0.1 Lock Reader Module - 1.2.3 5% Lock firmware version 3.0.2 CONNECT Connecting to lock Pushing firmware Firmware pushed to lock DONE DONE DONE

> 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 then tap "Firmware". Select the firmware from the list you wish to update onto the lockset. The lockset will connect and begin pushing the firmware. When completed, the updated firmware versions and battery life will display. The lock will reset, returning it to Construction Mode and then must be resynch'd using this app to work with the credentials programmed into this system.

### Proxess Sync App Message Log Export

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Proxess Sync<sup>™</sup> - Settings & Firmware Updates -

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Proxess Sync 🔅	Proxess Sync ACS Settings
STATUS SYNC DOORS	STATUS Lock Sync Settings
<b>Status</b> Last synced: Tuesday, May 9, 2017 11:19 PM There are 16 doors to update.	Filter       Mi       Firmware         Updatable       Export Log         Locations       Real Door :17:28:11         Damo       Real Door :17:28:12         Richmond       Real Door :17:28:12         Superior, CO       Rob's Office         CLEAR       Server Room         FILTER       TaylorDemo         Tom's Office       Tom's Office
	Torre's Test Door

For advanced diagnostics, usually upon request from the Proxess Technical Support team, the Proxess Sync<sup>™</sup> 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.





From the Home screen \ Dashboard, click "Time Schedules".

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				TIME INTERVALS										
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Ľ	r	0	Always	Always										This time schedule represents always and is a system default
1		0	Never							-	<u> </u>	_		This time schedule represents never and is a system default
Ľ			DATA Test Schedule 1	12:45 (12:45 PM)	17:45 (05:45 PM)			<u></u>						
1		w	DATA Test Schedule 2	13:30 (01:30 PM)	13:45 (01:45 PM)							- 2		
H	,	南		09:30 (09:30 AM)	09:45 (09:45 AM)				<u></u>	<u></u>	<u></u>	<u> </u>		
1		w.	Delivenes	04:00 (04:00 PM)	19300 (07300 PM)							- 2		Breaktast & Dinner food deliveries on weekdays & Brunch on 1
				08:00 (08:00 AM)	10:00 (10:00 AM)			-						
	•	Ō	Morning Shift	04:30 (04:30 AM)	19:00 (07:00 PM)						-	Ē		
	•	ŵ	Sometimes	11:00 (11:00 AM)	21:00 (09:00 PM)						- <u>-</u>	-		sometimes
1	•	ŵ	Workday	07:30 (07:30 AM)	18:00 (06:00 PM)									
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Type in a name for the new Time Schedule and click "Create".

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			TIME INTERVALS										
ACT	ONS	TIME SCHEDULE	FROM	то	MON	TUES	WED	THURS	FRI	SAT	SUN	HOLIDAY	NOTES
1	Ū	Always	Always										This time schedule represents always and is a system default
1	靣	Never											This time schedule represents never and is a system default
1	Ō	DATA Test Schedule 1	12:45 (12:45 PM)	17:45 (05:45 PM)									
1	Ŵ	DATA Test Schedule 2	13:30 (01:30 PM)	13:45 (01:45 PM)									-
			09:30 (09:30 AM)	09:45 (09:45 AM)									
1	ŵ	Deliveries	16:00 (04:00 PM)	19:00 (07:00 PM)			2						Breakfast & Dinner food deliveries on weekdays & Brunch on '
			04:00 (04:00 AM)	07:00 (07:00 AM)									
			08:00 (08:00 AM)	10:00 (10:00 AM)									
1	Ŵ	Morning Shift	04:30 (04:30 AM)	19:00 (07:00 PM)					<b>X</b>				
1	Ŵ	Sometimes	11:00 (11:00 AM)	21:00 (09:00 PM)									sometimes
1	đ	Workday	07:30 (07:30 AM)	18:00 (06:00 PM)			191						

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.

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ME SC	HEDULES												
+ Create	e New Time Schedule												Search Time Schedules
		TIME INTERVALS											
CTIONS	TIME SCHEDULE	FROM	то	MON	TUES	WED	THURS	FRI	SAT	SUN	HOLIDAY	NOTE	5
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		09:30 (09:30 AM)	0945 (09:45 AM)										
)	Second Shift	C	$) ] ( \cdot )$										ļ
						dd Time	Interval						

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.

TIME SCHEDULES		TIME SCHEDULES	
+ Create New Time Schedule	Search Time Schedules 🔎	+ Create New Time Schedule	Search Time Scher
	TIME INTERVALS	TIME INTERVALS	
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🖉 🛍 Never	This time schedule represents never and is a system default	Never	This time schedule represents never and is
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🖌 🛍 Morning Shift	04:30 (04:30 AM) 19:00 (07:00 PM) 🗹 🗹 🖉 🦉	📝 🖞 Morning Shift 04:30 (04:30 AM) 19:00 (07:00 PM) 📝 📝 📝 📝	
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	04:00 (04:00 AM) 07:00 (07:00 AM) 📝 📝 📝 📝 🖉	04:00 (04:00 AM) 07:00 (07:00 AM) 📝 📝 📝 📝	
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🖍 🛍 Workday	07:30 (07:30 AM) 18:00 (06:00 PM) 🕜 📝 📝 📝 🖉	🖍 🤠 Workday 07:30 (07:30 AM) 18:00 (06:00 PM) 📝 📝 📝 📝	
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DATA Test Schedule 2	13:30 (01:30 PM) 13:45 (01:45 PM)	🖍 🔟 DATA Test Schedule 2 13:30 (01:30 PM) 13:45 (01:45 PM) 📝 🛄 🛄 🛄	
	09:30 (09:30 AM) 09:45 (09:45 AM) 📝 📝 📝 📝 🖉 🖉	09:30 (09:30 AM) 09:45 (09:45 AM) 🗹 🗹 🖉 🦉	
Second Shift	16:00 (04:00 PM) 00:00 (Midnight) 📄 📝 📝 📝 💼 💼 👘 Evening Shift for Operations at Main Plant	Second Shift 16:00 (04:00 - 00:00 (Midni - 🗌 🗹 🗹 🗌	Evening Shift for Operations at Main Plant
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4			
ady Operator: rschorr		Ready Operator: rschorr	
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n maka rr	anges, of to add time intervals, click the Edit icon.		
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19:15 (07:15 + 0000 (Midni +   // // // //	
Add Time Interval	

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.

Pn Pn	oxes	s Access Control Syst	em										≡ <mark>(♠)</mark> ¢    ⊡
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TIM	E SC	HEDULES											
	Treat	e New Time Schedule											Search Time Schedules D
			TIME INTERVALS										
ACT	ONS	TIME SCHEDULE	FROM	то	MON	TUES	WED	THURS	FRI	SAT	SUN	HOLIDAY	NOTES
1	Ū	Always	Always										This time schedule represents always and is a system default
1	Ō	Never											This time schedule represents never and is a system default
1	Ŵ	Sometimes	11:00 (11:00 AM)	21:00 (09:00 PM)									sometimes
1	đ	Morning Shift	04:30 (04:30 AM)	19:00 (07:00 PM)									
1	Ō	Deliveries	16:00 (04:00 PM)	19:00 (07:00 PM)									Breakfast & Dinner food deliveries on weekdays & Brunch on 1
			04:00 (04:00 AM)	07:00 (07:00 AM)									
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1	Ū	DATA Test Schedule 1	12:45 (12:45 PM)	17:45 (05:45 PM)									
1	Ū	DATA Test Schedule 2	13:30 (01:30 PM)	13:45 (01:45 PM)									
			09:30 (09:30 AM)	09:45 (09:45 AM)					2				
1	Ū	Second Shift	16:00 (04:00 PM)	18:15 (06:15 PM)									Evening Shift for Operations at Main Plant
			19:15 (07:15 PM)	00:00 (Midnight)									
ady O	perat	or: rschorr											
	-				_	_	_	_	_		_		

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.

Time Schedules - 2

# **DOOR GROUPS**

Before proceeding to create Door Groups, please review our online tutorial, which will greatly simplify your data entry and ongoing maintenance:

www.proxess.com/Proxess/media/Proxess/Documents/Pr oxessIQ-Manual-without-Hidden-Slides\_3.pdf?ext=.pdf

ProxessIQ <sup>™</sup>	ALL ORGANIZATIONS	-				=   🏫   🔯	[+] - 🗆 :	×	ProxessIQ™ <u>File Window</u> Access <u>Adm</u>	iin Repor
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le Window Access Admin Reporting Cloud About	
← Doors Groups	$\sim$
NEW DOOR GROUP > GENERAL	Save
Door Group Name: Engineering Department	
External ID:	
Note:	
Auto Enrolt:	
dy   Operator: Administrator	h.

Enter the name for the new Door Group. "External ID" and "Notes" are not mandatory and are just for the administrator's reference. Checking the "Auto Enroll" box will cause all future doors that are added into the software to be enrolled into this Door Group. Click "Save" to do so.

ProxessIQ <sup>™</sup>		=1	n i 🌣	[ <del> </del>   _		x
<u>File Window Access Admin Re</u>	porting Cloud About					
DOOK GROUPS						
	+ Add New Door Group		Search		م	
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Click "Add New Door Group" to do so. You may also use the Search box in the top right to find existing Door Group names, 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 Pencil/Edit icon on the left side.

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	Door Saved	



	ProcessQ <sup>®</sup> Elle Window Access Admin Reporting Cloud About Cours Groups ENGINEERING DEPARTMENT > GENERAL Oors Group Nume Engineering Department Doors Oroup Nume Engineering Department Auto Enroll Auto Enroll	ProcessQ"
g Door Groups -	Click on the "Doors" tab to add the Doors that will become a part of this new group.	Click "Add New Door Group" to do so. You may also use the Search box in the top right to find existing Door Group names, 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 Pencil/Edit icon on the left side.
	Process(C)  File Window Access Admin Reporting Cloud About  C Doors Groups NEW DOOR GROUP > GENERAL  Coor Group Name: Engineering Department Ectemal 1D Notes Auto Enrol:  Au	Precessory  Prece

Enter the name for the new Door Group. "External ID" and "Notes" are not mandatory and are just for the administrator's reference. Checking the "Auto Enroll" box will cause all future doors that are added into the software to be enrolled into this Door Group. Click "Save" to do so.

Click on "OK".

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Eile Window Access Admin Reporting Cloud About	File Window Access	Admin Reporting Cloud About
← Doors Groups ENGINEERING DEPARTMENT > DOORS	← Doors Grou Engineering D	ps FPARTMENT > DOORS
General	General	Software Team   Add  Actions Doors
Doors	Doors	Software Room
Ready Operator: Administrator	Ready Operator: Administr	ator
Click the dron-down arrow and from the list that a	annears The do	oor will now appear in this list. You can continue to add

Click the drop-down arrow and from the list that appears, select the first Door you wish to add to this Door Group. Then click the "Add" button.

The door will now appear in this list. You can continue to add doors to this new Door Group and Delete doors from this group. Once you have added all the doors desired for this group, you may return to programming in other sections of the program.



F	***	Â		<u></u>	ā,	3	Ŷ
Doors	Lsers	Door Groups	Credentials	Calendars	Time Schedules	Access Profiles	Controllers
1		÷	- Cor		<b>₽</b>	E	
System Operator	System Operator Roles	Mobile Devices	Settings	Logs	Mobile Credentials	Notifications	Cloud Settings

From the Home screen \ Dashboard, click "Doors".
Before adding Doors, consider adding any custom
Time Schedule and Access Profiles you desire.

Proxess Access Control Syste								🌣   🕞	
← Access									
DOORS									
Filter by	(+ A1	dd New Doo	$\mathbf{>}$					Search	Doors D
		ACTIONS	NAME	LOCATION	TYPE	LAST UPDATE	CREATED	BATTERY	ONLINE CONTROLS
		/ 🗊	Adams Test Door	DATA's Office	Offline	2/20/2017 6:04:15 PM	2/20/2017 6:04:33 PM	0%	
Online		/ 🗊	Debug_Lock_0B:31	DATA's Office					
Offline		/ 🗇	Demo Door	Demo Location					
		1 🗴	Demo Door 2	Demo Location					
	Comparing and the second of the second								
		/ 🗊	Lock With Rolled Keys #1	DATA's Office					
		/ 🗊	Lock With Rolled Keys #2	DATA's Office					
		/ 🗊	Mikes Demo	DATA's Office					
		1 🗴	Mike's Toggle Lock	Demo Location					
		1 🗴	Real Door :0B:1E	DATA's Office					
		/ 🗊	Real Door :17:28:11	DATA's Office					
		/ 🗊	Real Door :17:28:12	DATA's Office					
		/ 🗊	Rob's Office	Richmond					
		/ 🔟	Server Room	DATA's Office					
		/ 🔟	TaylorDemo	DATA's Office					
		1	Tom's Office	DATA's Office					
		/ 🔟	Torre's Test Door	Superior, CO					
			Advanced Search	Reload	Expor	t			

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.

	Door Type:	Offline	<u> </u>	() update required
eneral				
	Name'			<u>~</u>
	External Lock ID:			
	Location: !		$\overline{\bigcirc}$ (+)	
	Time Zone:	Superior, CO	Use Default:	
	Minimum Validation Date:	DATA's Office	 [12]	
	Lock Mode:	Demo Location	Use Default: 🗹	
	Lock Number:			-
	Lock Model:			
	Battery Replaced Date:	5/21/2017	11	
	Notes:			
	Name of Firmware v1.1			Battery Status: 100%, 05/21/2017

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.

Proxess Access Control System					
← Doors NEW DOOR > GENERAL					
	Door Type				() update require
	Add Ne	w Location			
	Location Name	Richmond			
	Address Line 1	123 Main Street			
	Address Line 2				
	City	Richmond	•		
	State	Virginia	¥		
	Country	USA			
	Postal Code	23456			
	Save	Cancel			

The "Add New Location" screen appears. Enter a "Name", and any other information you desire. Click the "Save" button to complete the action.

Proxess Access Control System				≡  <b>≜</b>  \$ ₽ \$ - • ×	Proxess Access Control System	em		=1	♠ \$  ₽ \$  - □
← Doors NEW DOOR > GENERAL				Save		L,			Save
General	Door Type:	Offline •		Last Update: 5/21/2017 11:02:58 PM	Conoral	Door Type:	Offline		() update requir Last Update: 2/19/2017 11:39:33
	Name: !		Holiday Calendar: !		General				
	External Lock ID:		Unlock Schedule:	Never •	Door Groups		P. 117 (200)		
	Location: !	· · / +	First Person In:	Use Default:		Name:	Rob s Office		
	Time Zone: Minimum Validation Date:	Us/Mountain Use Default:	Card Only Schedule:	Always *	Access Profiles	External Lock ID:			
	Lock Mode:	Storeroom Mode   Use Default:	Momentary Unlock Time:	3 Use Default:	Access Audit	Location:	Richmond	/ + 	
	Lock Number:		Momentary Unlock Time Ext	z 30 Use Default: 🖌	Access Addit	Time Zone:	US/Mountain 👻 U	se Default:	
	Lock Model:				Logs	Minimum Validation Date:	2/19/2017		
	Battery Replaced Date:	5/21/2017			2	Lock Mode:	Storeroom Mode * U	se Default: 🗹	
	NOLES				Advanced Settings	Lock Number:			
						Lock Model:			
						Battery Replaced Date:	2/19/2019	13	
						Notes:	No Door Controller, yet		
						Name of Firmware v1.1			Battery Status: 100%, 02/19/2019
				Last Modified: 5/21/2017 11:02:58 PM					Last Modified: 6/9/2017 12:36:54 AN
ty Operator, ischorr					Protect Community and the	Kanananananan			

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.

Proxess Access Contro	l System								≡  ♠	\$	<b>⊡</b>	1	- •
← Access DOORS													
Filter by		+ Ac	dd New	Door							Search	Doors	
			ACTIO	NS	NAME	LOCATION	TYPE	LAST UPDATE	CREATED	BA	TTERY	ONLIN	CONTROL
			/	ŵ	Adams Test Door	DATA's Office	Offline	2/20/2017 6:04:15 PM	2/20/2017 6:04:33 PM	0%			
Online Online			1	ŵ	Debug_Lock_0B:31	DATA's Office							
Offline			1	ŵ	Demo Door	Demo Location							
			1	ŵ	Demo Door 2	Demo Location							
			1	ŵ	Front Door	DATA's Office							
			1	ŵ	Lock With Rolled Keys #1	DATA's Office							
			1	ŵ	Lock With Rolled Keys #2	DATA's Office							
			1	ŵ	Mikes Demo	DATA's Office							
			1	Ŵ	Mike's Toggle Lock	Demo Location							
			1	Ŵ	Real Door :0B:1E	DATA's Office							
			1	Ŵ	Real Door :17:28:11	DATA's Office							
			1	Ŵ	Real Door :17:28:12	DATA's Office							
			1	Ŵ	Rob's Office	Richmond							
			1	ŵ	Server Room	DATA's Office							
			1	Ŵ	TaylorDemo	DATA's Office							
			1	Ŵ	Tom's Office	DATA's Office							
			1	Ŵ	Torre's Test Door	Superior, CO							
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– Access DOORS							
ilter by	Advanced Search						
	Name	Contains			]	ŵ	
] Online ] Offline	Name Update Required Lock Model Calendar	Contains Is equal to Starts with Ends with			) AND (Exclusive) ) OR (Inclusive)		
	Unlock Schedule		ТҮРЕ	LAST UPDATE	CREATED	BATTERY	Savi
	First Person In     Last Update Date Time	DATA's Office DATA's Office					
	Minimum Validation Date Battery Last Changed	Office Tower II DATA's Office					
	Battery Status Last Updated InstallationDate	s #1 DATA's Office s #2 DATA's Office					
	Aikes Demo     Aike's Toggle Lock	DATA's Office Demo Location					
	🗋 🖍 🖞 Proxess Test Door	Proxess	Offline	6/28/2017 10:33:42 PN	6/28/2017 10:35:30 PM	0%	

Click "Advanced Search".

Adding & Editing Doors - 2

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 lockset Door has been created in the software, it **MUST** be initialized for operation using the Proxess Sync<sup>™</sup> 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<sup>™</sup> 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.

#### Initialize a Lockset (2 of 2)

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Proxess Sync	Proxess Sync	: Proxess Sync :	← Main Office, 3rd Floor :
STATUS SYNC DOORS CREDENTIALS	STATUS SYNC DOORS CREDENTIAL	S STATUS SYNC DOORS CREDENTIALS	Name Main Office, 3rd Floor
Status	Filter Boat Docks	Filter Main Office, 3rd Floor	Address Lock Mode Office Mode
Last synced: Thursday, Feb 11, 2021 3:21 PM	Has updates Engineering Manager	Has updates	Has updates False
There is one door to update.	Locations Default Location Location	Locations Default Location	buildle versions appare.o
There are 6 unbound doors.	Washington,	Washington, DC	CONNECT
	Long Island Main Office, 3rd Floor	Cong Island	
	Lake Haptong Pete's House O'Potatoe	S Lake Haptong	
	Lock Mode	Lock Mode Construction Mode	
	Storeroom Mode Test Lab	Storeroom Mode	
	Office Mode	Office Mode	
	Privacy Mode	Privacy Mode	
	FILTER	* FILTER	

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 "Connect".



If the select device screen appears, click on the device with the greatest signal strength. Click the "Sync" button and once initialized, the battery level and firmware version for the lock's boards will display. The initialization is complete and you may return to other screens in the App or simply close it.

<ul> <li>Proxess Access Control 5</li> </ul>	≡   ♠   ✿   ⊕   ♥   - □ ×
- Access	
ilter by	Advanced Search X
	Name
] Online ] Offline	First Person In
	Search R Save
	ACTIONS NAME LOCATION TYPE LAST UPDATE CREATED BATTERY ONLIN
	C Kob's Office Richmond Offline 2/19/2017 11:39:33 PM 2/19/2017 11:43:04 PM 0%
	Keal Door:17:28:11     DATA's Office     Offline     3/7/2017 10:24:13     PM     3/7/2017 10:25:15     PM     0%
	Image: The set of the
	·
	·

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".

				= 1	ħ ¢ ⊡ \$' = □ ×
					Save
Door Type:	Offline			<u>·</u> ]	Last Update: 2/19/2017 11:39:33 PM
Name: External Lock ID:	Rob's Office				Î
Location: Time Zone:	Richmond US/Mountain	•	Use Defa	ult: 💽	
Minimum Validation Date: Lock Mode:	2/19/2017 Storeroom Mode	-	Use Def	111:	1
Lock Number: Lock Model:					
Battery Replaced Date: Notes:	2/19/2019 No Door Controller, yet			1	<u> </u>
					Battery Status: 100%, 02/19/2019 Last Modified: 6/9/2017 12:36:54 AM
	Door Type: Name: External Lock ID: Location: Time Zone: Minimum Validation Date: Lock Mode: Lock Mode! Battery Replaced Date: Notes: Name of Firmware V1.1	Door Type:     Offline       Name:     Rob's Offlice       External Lock ID:	Door Type:     Offline       Name:     Rob's Offlice       External Lock ID:	Door Type:     Offline       Name:     Rob's Office       External Lock ID:	Door Type:       Offline         Name:       Rob's Offlice         External Lock ID:

Click the "Door Groups" tab. Note that you may also add Door Groups from the Door Groups menu on the Home page.

ProcessiQ*	ALL ORGANIZATIONS	•					<b>G</b>
Dashboard Acc							
Doors	<b></b>	Coor Groups	Credentials	Calendars	C. Time Schedules	Access Profiles	Controllers
System Operator	System Operator Roles	• Mobile Devices	Settings	Logs	아 Mobile Credentials	Notifications	Cloud Settings

	N								-	<b>.</b>	-	
	Proxess Access Control Syste	m	_						= 1	₽	W -	- ×
	DOORS											
	Filter by	+ A	LISS N	ew Doo						Search		
			AC	TIONS	NAME	LOCATION		LAST UPDATE	CREATED	BATTERY	ONLINE O	ONTROLS
			1	t	Adams Test Door	DATA's Office	Offine	2/20,/2017 6:04:15 PM	2/20/2017 6:04:33 PM	0%		
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					Advanced Search	Reload	Experi					

<sup>7</sup> Click the "Doors" module and then click the edit icon for the door to continue editing properties for.

Proxess Access Control System		≡  <b>☆</b>   <b>\$</b>   <b>\$</b>   <b>\$</b>  - □ ×
← Doors ROB'S OFFICE > DOOR GRO	UPS	
General	Enter New Door Group	Add Create New Door Group
Door Groups	All DATA Office Doors	<del></del>
Access Profiles Access Audit	1 Every Door	
Logs		
Advanced Settings	Export	

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.

neral	Manufactu	ing	• Add		
or Groups		NAME			_
or Groups		All DATA Office Doors			
cess Profiles	ă III	Manufacturing			
cess Audit					
gs					
lvanced Settings					

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.

General	Enter New Door Group	Add Create New Door Group
Door Groups	Demo Door Group 1	
Access Profiles	Every Door Woodland Park Doors	
Access Audit		
ogs		
Advanced Settings		

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.

Proxess Access Control System				≡   1	<b>≜</b>   ‡	<b>G+</b>	1	-	= ×	P
← Doors ROB'S OFFICE > DOOR GROUPS										÷
General	Manufactu	ring								(
	ACTIONS	NAME								
Door Groups	<b>Ö</b>	All DATA Office Doors								
Access Profiles	۵ ۲	Every Door								
Access Fromes		Manufacturing								
Access Audit										C
/ lecess / laun										
Logs										
Advanced Settings										1
	Export									
	Export									-





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".

Conoral	LAST NAME	FIRST NAME	CREDENTIAL ID	CREDENTIAL NAME	ASSIGNMENT TYPE	ASSIGNMENT VIA	VIE
General	Schorr	Robert		Office Card	Credential	Door	ർ
Deer Cround	Geraci	Angelo		Credential	Credential	Door	ർ
Door Groups	Test	Joe		SMPL020-125266	Credential	Door Group	ർ
		Mike		Credential-7002	Credential	Door Group	ഫ്
Access Profiles	Schorr	Robert		Office Card	Credential	Door Group	ർ
	Geraci	Angelo		Credential	Credential	Door Group	ሐ
	Schorr	Robert		Office Card	Access Profile	Door	ሐ
	Geraci	Angelo		Credential	Access Profile	Door Group	¢
Logs	Schorr	Robert		Office Card	Access Profile	Door Group	ሐ
Advanced Settings							

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.

Proxess Access Control System						🗗   🖤   -	= ×
← Doors ROB'S OFFICE > ACCESS AUE	ЫТ						
	LAST NAME	FIRST NAME	CREDENTIAL ID	CREDENTIAL NAME	ASSIGNMENT TYPE	ASSIGNMENT VIA	VIEW
General	Schorr	Robert	0	Office Card	Credential	Door	ሔ
Deen Creating	Geraci	Angelo		Credential	Credential	Door	ሐ
Door Groups	Test	Joe		SMPL020-125266	Credential	Door Group	ሐ
		Mike		Credential-7002	Credential	Door Group	ሐ
Access Profiles	Schorr	Robert		Office Card	Credential	Door Group	ൻ
	Geraci	Angelo		Credential	Credential	Door Group	ሐ
	Schorr	Robert		Office Card	Access Profile	Door	ർ
	Geraci	Angelo		Credential	Access Profile	Door Group	ൻ
Logs Advanced Settings	Schorr	Robert	0	Office Card	Access Profile	Door Group	₩ ₩

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



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

- Doors						
ROB'S OFFICE >	LOGS					
General		Date Range	Select a date	Select a date		
Door Groups	<ul> <li>✓ July 2017</li> <li>Su Mo Tu We Th</li> <li>25 26 27 28 29</li> </ul>	Fr Sa 30 1		✓         July 2017         ▶           Su         Mo         Tu         We         Th         Fr         Sa           25         26         27         28         29         30         1		SOUR
Access Profile	2 3 4 5 6 9 10 11 12 13 16 17 18 19 20 23 24 25 26 27	7 8 14 15 21 22 28 29		2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29		rschorr MMABLE_VIA_BLE M, Mik
Access Audit	30 31 1 2 3	4 5 3	• : 0 • AM •		12 • : 0 • AM •	(Gerac
		1	6/20/2017 3:22:12 PM	6/20/2017 11:22:12 AM	ACCESS	Schorr,
Logs		1	6/20/2017 3:22:06 PM	6/20/2017 11:22:06 AM	ACCESS	(Gerac
		/	6/20/2017 3:20:28 PM	6/20/2017 11:20:28 AM	ACCESS	(Gerac
Advanced Set	tings	1	6/20/2017 3:17:08 PM	6/20/2017 11:17:08 AM	ACCESS	Schorr,
		1	6/20/2017 3:17:04 PM	6/20/2017 11:17:04 AM	ACCESS	(Gerac
		1	6/20/2017 3:16:56 PM	6/20/2017 11:16:56 AM	ACCESS	Schorr,
		1	6/20/2017 3:16:52 PM	6/20/2017 11:16:52 AM	ACCESS	(Gerac
		1	6/20/2017 3:16:45 PM	6/20/2017 11:16:45 AM	ACCESS	Schorr,
		1	6/20/2017 3:16:41 PM	6/20/2017 11:16:41 AM	ACCESS	(Gerac
		- <b>(</b>	6/20/2017 2-16-32 DM	6/20/2017 11-16-33 AM	ACCESS	Schorr

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.

ROB'S OFFICE > 10GS					
	I				
General	Date Range	e Select a date 14 To	Select a date 11 Go		
	ACTIONS	EVENT DATE TIME(UTC)	EVENT DATE TIME(LOCAL)	EVENT CODE	SOURC
Door Groups	1	7/6/2017 9:40:00 PM	7/6/2017 5:40:00 PM	DOOR_UPDATE	rschorr
	1	7/6/2017 9:30:44 PM	7/6/2017 5:30:44 PM	DOOR_UPDATE	rschorr
Access Profiles	1	6/20/2017 6:26:36 PM	6/20/2017 2:26:36 PM	LOCK_PARAMETERS_PROGRAMMABLE_VIA_BLE	M, Mike
	1	6/20/2017 6:25:26 PM	6/20/2017 2:25:26 PM	ACCESS	Schorr, F
Access Audit	1	6/20/2017 6:25:23 PM	6/20/2017 2:25:23 PM	ACCESS	(Geraci,
	1	6/20/2017 3:22:12 PM	6/20/2017 11:22:12 AM	ACCESS	Schorr, F
Logs	1	6/20/2017 3:22:06 PM	6/20/2017 11:22:06 AM	ACCESS	(Geraci,
	/	6/20/2017 3:20:28 PM	6/20/2017 11:20:28 AM	ACCESS	(Geraci,
Advanced Settings	1	6/20/2017 3:17:08 PM	6/20/2017 11:17:08 AM	ACCESS	Schorr, F
	1	6/20/2017 3:17:04 PM	6/20/2017 11:17:04 AM	ACCESS	(Geraci,
Video Integration	1	6/20/2017 3:16:56 PM	6/20/2017 11:16:56 AM	ACCESS	Schorr, F
	1	6/20/2017 3:16:52 PM	6/20/2017 11:16:52 AM	ACCESS	(Geraci,
	1	6/20/2017 3:16:45 PM	6/20/2017 11:16:45 AM	ACCESS	Schorr, F
	/	6/20/2017 3:16:41 PM	6/20/2017 11:16:41 AM	ACCESS	(Geraci,
	1	6/20/2017 3-16-33 DM	6/20/2017 11:16:33 AM	ACCESS	Schorr E

Click on the "Advanced Settings" tab.

Proxess Access Control System					è  ♥'   _   □   ×
← Doors					
ROB'S OFFICE > ADVANCED	SETTINGS				Save
Cananal	General Advanced	Audio and V	isual Feedback		
General	Installation Date: 2/19/2017	Beep with Pr	ogramming:		Use Default: 🗹
Door Groups	Failure Condition: Fail Secure 👻 Use Defau	It: Beep when A	ccess Granted:		Use Default:
	Audit Overwrite Policy: Circular Vse Defau	It:  Exterior LED:	ccess Denied:		Use Default: 🗹
Access Profiles	Supervision:	LED IIIu	mination Time for Invalid Acces	55: 1	Use Default: 🕡
	Series Resistor: 5 Use Defau	it: 🗹 🛛 IED II	lumination Time for Valid Acces	cc <sup>.</sup> 1	Use Default:
Access Audit	Parallel Resistor: 5 Use Defau	it: 🔽			
Logs	Toggle Delay Time: 5 Use Defau	lt 🔽			
Advanced Settings	Lockdown Configuration	Event Record	ling to Card		
	Lockdown Cancel Delay Time: 5 Use Defau	It: 🚽 Valid Access	Attempts:		Use Default: 🗹
Video Integration	Egress Cancels Lockdown: Use Defau	lt: 🗹 Invalid Acces	s Attempts:		Use Default: 🗹
	Pass-Through Cancels Lockdown: 🗾 Use Defa	lt: 📝 Contact Poin	ts:		Use Default: 🗹
	Interior LED Lockdown Indication:	Lock Events:			Use Default:
	Time Illuminiated: 1 Use Defau	lt: 📝 Communicat	ions:		Use Default: 🗹
	Time Extinguished: 1	it: 🗾			
		Reset			
		Reset Door	Roll Bundle Key	Roll Bluetooth Key	

#### Ready Operator: rschorr

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.

Proxess Access Control System				
ROB S OFFICE > ADVANCED SET			Jave	
General	ieneral Advanced nstallation Date: 2/19/2017	Audio and Visual Feedback Beep with Programming:	Use Default: 🗹	
Door Groups	ailure Condition:	Beep when Access Granted: Been when Access Denied:	Use Default:	
Access Profiles	Audit Overwrite Policy: Circular - Use Default:	Exterior LED:		
Access FIOIlles	Series Resistor: 5	LED Illumination Time for Invalid An	tcess: 1 Use Default:	
Access Audit	Parallel Resistor: 5 Use Default:			
Logs	loggle Delay Ime: 5 Use Detault:			
Advanced Settings	ockdown Configuration	Event Recording to Card		
Video Integration	ockdown Cancel Delay Time: 5 Use Default:	Valid Access Attempts: Invalid Access Attempts:	Use Default: 🗹	
	gress Cancels Lockdown: Use Default: 🗹 Pass-Through Cancels Lockdown: 📝 Use Default: 🗹	Contact Points:	Use Default:	
	nterior LED Lockdown Indication:	Lock Events: Communications:	Use Default: 🗹 Use Default: 🗹	
	Time Extinguished: 1 Use Default:			
		Reset		
		Reset Door Roll Bundle Key	Roll Bluetooth Key	
ady Operator: rschorr				a
lick on the "Vid	eo Integration" tab.			
			↓ · · · · · · · · · · · · · · · · · · ·	
ProxessiQ™   All org	ANIZATIONS -		+	≡ ♠ ◙ ₽ -
ProxessiQ™   All ORG	ANIZATIONS +		•	≡ ♠ ⊠ 0 -
ProxessiQ™   Allorg ← Doors			•	≡ו♠ו⊠ו⊖ו⊦
ProxessiQ™ All org ← Doors ASSUMPTION CLASSRO	ANIZATIONS	1 3	•	
ProxessiQ <sup>™</sup>   All ORG ← Doors ASSUMPTION CLASSRO Connectal	ANIZATIONS    OM 1 > VIDEO INTEGRATION  Select Camera		•	
ProxessiQ <sup>™</sup> All ord ← Doors ASSUMPTION CLASSRO General	ANIZATIONS   OM 1 > VIDEO INTEGRATION  Select Camera		······	
ProxessiQ <sup>™</sup>   ALLORG ← Doors ASSUMPTION CLASSRO General Door Groups	OM 1 > VIDEO INTEGRATION Select Camera School Classroom Corrorate L obby	1 3	IMBNAIL	
ProxessiQ <sup>™</sup>   ALL ORG ← Doors ASSUMPTION CLASSRO General Door Groups	OM 1 > VIDEO INTEGRATION           Select Carnera           School Classroom           Corporate Lobby           Senior Living Hallway	1 3 Add	IMBNAIL	
<ul> <li>ProxessiQ<sup>™</sup> ALLORG</li> <li>← Doors</li> <li>ASSUMPTION CLASSRO</li> <li>General</li> <li>Door Groups</li> <li>Access Profiles</li> </ul>	ANIZATIONS    OM 1 > VIDEO INTEGRATION    Select Camera   School Classroom  Corporate Lobby Senior Living Hallway Dormitory Recreation Contor	1 3 • Add   THU	IMBNAIL	
ProxessiQ <sup>™</sup> All ORG Cons Assumption classro General Door Groups Access Profiles	ANIZATIONS    OM 1 > VIDEO INTEGRATION    Select Camera    School Classroom  Corporate Lobby  Senior Living Hallway  Dormitory Recreation  Center  IT Racks	1 3 . Add THU	IMBNAIL	
ProxessiQ <sup>**</sup> All ORG Cons Assumption classro General Door Groups Access Profiles Access Audit	ANIZATIONS   OM 1 > VIDEO INTEGRATION  Select Camera  School Classroom Corporate Lobby Senior Living Hallway Dormitory Recreation Center IT Racks Records Department 2		IMBNAIL	
ProxessiQ <sup>™</sup> All ord  Cons  Assumption classro  General  Door Groups  Access Profiles  Access Audit  Event Logs	ANIZATIONS   OM 1 > VIDEO INTEGRATION   School Classroom Corporate Lobby Senior Living Hallway Dornitory Recreation Center IT Rarks Records Department Room 2		IMBNAIL	
ProxessiQ <sup>™</sup> All orac Doors Assumption classro General Door Groups Access Profiles Access Audit Event Logs	ANIZATIONS   OM 1 > VIDEO INTEGRATION   School Classroom Corporate Lobby Senior Living Hallway Dormitory Recreation Center IT Barks  Records Department Room Medical Laboratory		IMBNAIL	
ProxessiQ <sup>™</sup> All ores     Coors     Assumption classro     General     Door Groups     Access Profiles     Access Audit     Event Logs     Advanced Settings	ANIZATIONS  OM 1 > VIDEO INTEGRATION  Select Camera  School Classroom Corporate Lobby Senior Living Hallway Dormitory Recreation Center IT Backs Records Department Room Medical Laboratory Package Room Bool Arroa	1 3 • Add • TH	IMBNAIL	
ProxessiQ <sup>™</sup> All one Doors Assumption classro General Door Groups Access Profiles Access Audit Event Logs Advanced Settings	ANIZATIONS  OM 1 > VIDEO INTEGRATION  Select Carnera  School Classroom Corporate Lobby Senior Living Hallway Dormitory Recreation Center IT Racks Records Department Room Medical Laboratory Package Room Pool Area AV Control Room	1 3 • Add • THU	IMBNAIL	
ProxessIQ <sup>™</sup> ALL ORG Cons Assumption classro General Door Groups Access Profiles Access Audit Event Logs Advanced Settings Video Integration	ANIZATIONS  OM 1 > VIDEO INTEGRATION  Select Carnera  School Classroom Corporate Lobby Senior Living Hallway Dormitory Recreation Center IT Barks Records Department Room Medical Laboratory Package Room Pool Area AV Control Room	1 3 • Add • THU	IMBNAIL	
ProxessIQ <sup>™</sup> ALLORG Cons Assumption classro General Door Groups Access Profiles Access Audit Event Logs Advanced Settings Video Integration	ANIZATIONS  OM 1 > VIDEO INTEGRATION  Select Carnera  School Classroom Corporate Lobby Senior Living Hallway Dormitory Recreation Center IT Rarks Records Department Room Medical Laboratory Package Room Pool Area AV Control Room	1 3 • Add • THU	IMBNAIL	
ProxessIQ <sup>™</sup> ALLORG Cons Assumption classro General Door Groups Access Profiles Access Audit Event Logs Advanced Settings Video Integration	ANIZATIONS  OM 1 > VIDEO INTEGRATION  Select Carnera  School Classroom Corporate Lobby Senior Living Hallway Dormitory Recreation Center IT Backs Records Department Room Medical Laboratory Package Room Pool Area AV Control Room	1 3 • Add THU	IMBNAIL	
ProxessIQ <sup>™</sup> ALLORG Cons Assumption classro General Door Groups Access Profiles Access Audit Event Logs Advanced Settings Video Integration	ANIZATIONS  OM 1 > VIDEO INTEGRATION  Select Camera  School Classroom Corporate Lobby Senior Living Hallway Dormitory Recreation Center IT Rarks Records Department Room Medical Laboratory Package Room Pool Area AV Control Room		IMBNAIL	
ProxessIQ <sup>™</sup> ALLORG Cons Assumption classro General Door Groups Access Profiles Access Audit Event Logs Advanced Settings Video Integration	ANIZATIONS OM 1 > VIDEO INTEGRATION Select Camera School Classroom Corporate Lobby Senior Living Hallway Dormitory Recreation Center IT Barks Records Department Room Medical Laboratory Package Room Pool Area AV Control Room		IMBNAIL	
ProxessiQ <sup>™</sup> All ORG     Corres     Assumption classro     General     Door Groups     Access Profiles     Access Audit     Event Logs     Advanced Settings     Video Integration	ANIZATIONS  OM 1 > VIDEO INTEGRATION  Select Camera  School Classroom Corporate Lobby Senior Living Hallway Dormitory Recreation Center IT Backs Records Department Room Medical Laboratory Package Room Pool Area AV Control Room			

From this page you will select the cameras you wish to associate with and record video clips with for any event that occurs at this Door.

Click on the drop-down arrow (1) and all of the cameras that are connected to the NVR/VMS entered into the config file will automatically appear here. You may select (2) four (4) cameras to be associated with any event from this camera by selecting the first camera and clicking the "Add" button (3) and repeating the process for the cameras you need.
General	Select Carr	iera	- Add		
Door Groups		NAME		 	
	Ū	School Classroom			
Access Profiles	ŵ	Corporate Lobby			
Access Audit	Ū.	Senior Living Hallway			
Event Logs			1 032000		
Advanced Settings					
Video Integration					

In this case, 3 cameras have been associated with this door. As a visual reference only, the static thumbnail image from each camera will appear. Updated thumbnail images can be obtained by clicking the "Refresh" button.

Note: Proxess does not display, record or store video clips. They exist solely on the NVR/VMS. Thus, for real-time and archived video event viewing, please use the NVR/VMS client software.

N ProxessIQ™	ALL ORGANI	ZATIONS	×								- 0
- Reporting											
AUDITS/EVENTS											
ilter by										Search	
		ACTIONS	EVENT CODE		M NAME SOURCE USER/OPE	RATOR EVENT DATE TIME(LOC	AL) CREATED (LOCAL)		ORGANIZATI	ONS VIDEO	
		1	ACCESS	Assumption	Classroom 1 Teacher, Math	12/4/2023 2:01:42 PM	12/4/2023 2:08:07 PM		Global	<b>C</b>	
Adhoc 🔶 🛅		N	ACCESS	Assumption	Classroom 1 Teacher, Math	3/7/2024 3:34:10 PM	3/20/2024 9:19:45 PM	3/ 3/	Global		
General 🔿 🔟		1	ACCESS	Assumption	Classroom 1 124, Borden	8/8/2023 11:36:36 AM	8/8/2023 11:37:24 AM	8/ 8/	Global		
Daily Use 🚽 🏢		1	ACCESS	Assumption	Classroom 1 124, Borden	8/8/2023 11:36:36 AM	9/20/2023 8:39:27 PM	8/ 9/	Global	-	
		1 de la companya de l	ACCESS	Assumption	Classroom 1 Teacher, Math	9/25/2023 3:35:35 PM	9/25/2023 3:36:13 PM	9/9/	Global	(■)	
		1	ACCESS	Assumption	Classroom 1 Teacher, Math	10/2/2023 11:06:16 AM	10/12/2023 12:05:29 PI	M 1( 1(	Global		
		1	ACCESS	Assumption	Classroom 1 Teacher, Math	1/24/2023 11:34:15 AM	1/24/2023 11:35:06 AM	1/ 1/ 1/	Global	<b>K</b>	
		1	ACCESS	Assumption	Classroom 1 Teacher, Math	3/18/2024 3:01:15 PM	4/17/2024 11:52:33 AM	3/4/	Global	<b>—</b>	
		1	ACCESS	Assumption	Classroom 1 Teacher, Math	1/16/2024 8:54:12 AM	1/16/2024 8:54:35 AM	1/ 1/	Global		
		1	ACCESS	Assumption	lassroom 1 Teacher, Math	1/24/2023 7:06:27 PM	5/18/2023 4:39:00 PM	1/ 5/	Global	<b></b>	
		1	ACCESS	Assumption	Classroom 1 Teacher, Math	1/24/2023 7:06:27 PM	1/24/2023 7:07:18 PM	1/ 1/	Global		

Doors with one or more cameras affiliated with its events will display a video camera icon. Double-click on the camera icon to view the thumbnail images of the cameras, at three (3) seconds before the time of the event occurrence.

For further video information, go to the NVR/VMS event log.

ProxessIQ™   ALL ORGA	NIZATIONS 🝷			
← Logs LOG DETAILS				
Log Details	Date:	3/7/2024 8:34 PM		
	Event Code:	ACCESS		
	Event Code Type:	Audit:Valid Access		
	Source Type:	Lock Audit		
	Source Item Name:	Assumption Classroom 1		
	Advanced Details:	( "Cord EventDetails" "57700", "Battery": 100%, "EventDetailCode": "0xE1" )		
	Thumbnails	NAME	THUMBNAIL	J
		BUILD_862IP_Webcam		
		usb_cam-HP Wide Vision HD	Dirth.	
		Removed (id=[aefa671e-1b47-f6fa-156d-eedcdd683fbr		
eady Operator: Administrator				

### **Configuring Video Integration**

Proxess currently integrates with Hanwha Wisenet WAVE 5.0

To configure the Hanwha video integration, you must have Admin privileges on the Proxess Server computer:

On that computer, go to c:/Program Files (x86)/Proxess/Server.

Locate and open the Notepad file "Proxess.Service.Host.Console.exe", which is about 5k in size.

Change or add the information, precisely, per the below <add key="videointegrationenabled" value="true" /> <add key="videointegrationtype" value="1" /> <add key="videointegrationhost" value="https://localhost:7001" /> <add key="videointegrationforcessltrust" value="true" /> <add key="videointegrationusername" value="true" /> <add key="videointegrationusername" value="superSecurePassword" />

Save that file and you may now close it.

Inside ProxessIQ, in the Doors menu and the Video Integration tab for a selected door, the camera list will now automatically populate with all cameras that are connected to the NVR/VMS.



NIZATIONS •   Imin Reporting Cloud				≡  ♠   ⊠	<b> -</b>  -
			ē,	Ť	<u>\$</u>
Door Groups	Credentials	Calendars	Time Schedules	Access Profiles	Controllers
- -			រា		
Operator Mobile Devices	Settings	Logs	Mobile Credentials	Notifications	Cloud Settings
	NIZATIONS	NIZARIONS INTERNET OF CIRCUMS INTERNET OF CIRC	AXZANOAS  AMARANA REPORTING Cloud  AMARANA REP	AXXIIONS Imin Reporting Cloud Imin Coor Groups Codentials Calendars Image Checked Calendars Image Checked Image Checke	AXZATIONS       Image: Cloud         Image: Cloud       Image: Cloud

We will now review the real-time/online door controls. From the Home screen \ Dashboard, click "Doors". "Online" Doors are BoxIQ PoE controllers, as well as any lock or Mini-IQ that is bridged to it.

ProxessIQ <sup>™</sup>	
← Access DOORS	
Filter by	
	L ACTIONE NAMARE LOCALINN THRE DY UPDATE (UTC) CHEATED (UTC) BATTERY UPDATES ONLINE CONTROLS AWALABLE LOCK STATE
Online	
	All Multical Months     Shortline     S
	1
	🗆 🖌 🎁 50 Office Controller Damo 50 Offices Online 57/2019/45117 PM

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.

ATED (UTC)	BATTERY	UPDATES	ONLINE	CON	TROLS		AVAILABLE	LOCK STATE	ATED (UTC)	BATTERY	UPDATES		.INE C	ONT	ROLS		AVAILABLE	LOCK STATE	Í.
2019 8:34:21 PM	99%						0		 2019 8:34:21 PM	99%							0		
1/2018 11:05:33 PM									1/2018 11:05:33 PM										
019 6:16:23 PM		<b>V</b>	(i)	0	8	0		2	019 6:16:23 PM		~	۲	<b>6</b>	0	8	2		2	
2019 7:46:47 PM									2019 7:46:47 PM										
2018 3:35:09 PM		•							2018 3:35:09 PM		•				$\sim$				
019 451:17 PM		<b>V</b>	(e)	0		3		ល	019 4:51:17 PM		<b>V</b>	۲	676		8	3		2	
				[	Lockdo	wn Doo	or									Cancel	Lockdown		

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

ATED (UTC)	BATTERY	UPDATES	ONLINE CONTROLS	AVAILABLE	LOCK STATE
2019 8:34:21 PM	99%			0	
			🛞 🐢 👩 😣 😂		C
1018 3:35:09 PM		•	$\sim$		
		<b>V</b>	🔞 🚓 📑 🕺 😅		2

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.



		a 60	84.				e78.5		2	<b>196</b> 2											
ATED (UTC)	BATTERY	UPDATES	ONLI	NE CO	ONTRO	LS		AVAILABLE	LOC	CK STATE	CREATED (UTC)	BATTERY	UPDATES		ILINE	CONT	ROLS		AVAILABLE	LOCK STATE	1
2019 8:34:21 PM								0			7/18/2019 8:34:21 PM	99%							0	in.	
		✓									1/14/2018 11:05:33 PM									$\sim$	
019 6:16:23 PM			۲	6	0 (	3 6	C			C	/7/2019 6:16:23 PM			۲	0.0	0	0	3		(8)	
											//29/2019 7:46:47 PM									$\smile$	
2018 3:35:09 PM		-				1					 )/20/2018 3:35:09 PM		~								
		<b>V</b>	۲	6			3)			3	/7/2019 4:51:17 PM			۲	0	0	0	C		S	
							Refi	resh State													

Click this icon to Refresh the state of the lock.

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

And a second sec			DNLINE	CON	TROLS		AVAILABLE	LOCK STATE	ATED (UTC)	BATTERY	UPDATES	ONI	INE C	ONTR	OLS		AVAILABLE	LOCK STATE	
2019 8:34:21 PM 999	16						0		2019 8:34:21 PM	99%							0		
		~							I/2018 11:05:33 PM		<b>V</b>							$\sim$	
		☑ (	) d'i	. 0	8	2		C	019 6:16:23 PM			۲	-		8	3		( 🖬 )	
		7							2019 7:46:47 PM		~							Momen	tary Unloc
		<b>V</b>							2018 3:35:09 PM		~								
		V (0	) ari	. 0	8	3		C2	019 4:51:17 PM		<b>V</b>	•	0.0	0	8	3		S	

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

ATED (UTC)	BATTERY	UPDATES	ON	ILINE	CONT	ROLS		AVAILABLE	LOCK STATE
2019 8:34:21 PM	99%							0	
I/2018 11:05:33 PM									$\sim$
		•	۲	6	0	0	C		( 🔒 )
									$\smile$
2018 3:35:09 PM		~							
		~	0	676		8	3		3

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

## Lock & Mini-IQ De-Bugging

If a reader on a Mini-IQ is either unresponsive to a card or a mobile phone credential, or the reader's LED is fading in and out red, then the communication to the reader may need to be reset,

A purple LED on the lock indicates a Bluetooth connection problem. This can be either physical or electronic and a debug routine should be undertaken to cure the problem.

If the enrollment reader is either unresponsive to a card, or it's LED is fading in and out red, then the communication to the reader may need to be reset.

A primary cause is if it is connected to an older and slower USB 2.0 standard port.

Most often, simply unplugging the reader from its computer port and re-connecting it will bring it back to a functioning state. This might not be a permanent fix, as that port version may cause sporadic future interruptions. The best fix is to plug it into a USB 3.0 port or a USB-C port. In a pinch, any iPhone or Android phone can connect to the enrollment reader to encode or wipe cards.



ſ		ÂĀā			₫,	Ċ	
Doors	Users	Door Groups	Credentials	Calendars	Time Schedules	Access Profiles	Controllers
•		ភ			ភ		
wstem Operator	System Operator Roles		Settings		Mobile Credentials	Notifications	Cloud Settings
ystem Operator	Roles	Mobile Devices	Settings	LOGS	Credentials	Nouncations	

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.

a Provess()™	= (A) A (B) - a x
← Access CONTROLLERS	Search Controllers 0
New Controller(s) found on the network. Click "Bind" to assign the controller to this system. ADDRESS PORT 192 163.119 832 Bind	
ACTIONS NAME HOST FORT TRUSTED ENABLED FINGER/RINT STATUS FIRMWARE HARDWARE	
Rebad Advanced Search Export	

 Any controller that is connected, within the guidelines of our BoxIQ Connectivity document located here on our website:
 <u>www.proxess.com/documents/BoxIQConnect</u> 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  $\mathsf{ProxessIQ}$ 



Now click "Configure" to have the software configure this controller for its proper function within this software instance.

Proceeda?*		
← Access CONTROLLERS		
	Tenne I I	
	iyada finanza Mara likuwaki a	
Nety Constant Advertised		

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".

CONTROLLERS										
Contricolettics										
										Search Controllers O
	ACTIONS	NAME	HOST	PORT TRUSTE	ENABLED	FINGERPRINT	STATUS	FIRMWARE	HARDWARE	
	0.44									
		Provents Office Cond	troller 192,168,1.19	9 8765 🛃	~	57daddecfe3d6b1bf81482a12930e548a195d907	7 Connected	v10.14001-dirty		
	Delaut A	descreed Search	Export							
			and and a second							
why I Operator, Administrator										

The Controller is now bound, configured enabled and shown as Connected and operational.

Controller Saved	
The controller changes have been saved	

Click "OK" on the verification screen.

Mobile Credential Note: In order for this attached, online Door (as it is called in the software)/reader (the physical device that is wired to the controller) to be fully operational for Bluetooth Mobile credentials, you must now remove the power from the controller and then reapply it (i.e. power-cycle the controller). A Bluetooth address will now appear at the bottom left of the General Door tab of this connected reader and mobile credentials will operate.

ProxessIQ™		=====================================
File Window Access Admin F	Reporting Cloud About	
← Access		
CONTROLLERS		
		Search Controllers O
	Access reporting and access	
	A 192 168 50 144 The controller is trying to connect to a different ACS. If it should be connecting to us, it needs to be reset and rebound.	
	Actions Name Host Port Trusted Enabled Fingerprint Status Firmware Hardware	
	🖸 🖍 🏢 testing controller again 192.168.30.144 8765 🛛 🗹 3e0dcc1695-3087190940115x691cde3db32780 Disconnected v1.1.0 v1.0	

Note: It is unlikely, but possible to receive this Controller screen error message. For instance, if a controller from another system is placed on the network for your system (in a dealer's lab, for instance), your software will note the above, prompting your investigation and possible resetting of that controller for it to be bound into your system.

All Controller Related Status and Error Messages that may appear in blue highlight, as above:

• Controllers reporting status codes

Controller Error Messages - 3

- New Controller(s) found on the network. Click "Bind" to assign the controller to this system.
- The Controller is unable to reach the Proxess service. Check inbound TCP firewall rules.
- The Controller is timing out during key exchange. This is likely caused by poor network performance.
- The controller is trying to connect to a different ACS. If it should be connecting to us, it needs to be reset and rebound.
- Unknown, the status code is not supported. Update to receive information about this Controller.
- Unknown, the Controller has suffered a fault.

F	**	â		<u></u>	ē,	3	<u><u><u></u><u><u></u><u></u></u></u></u>
Doors	Users	Door Groups	Credentials	Calendars	Time Schedules	Access Profiles	Controllers
1		ទា			윈	a	
ystem Operator	System Operator Roles	Mobile Devices	Settings	Logs	Mobile Credentials	Notifications	Cloud Settings

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.

					_
ST DOOR CONTROLLER	> GENERAL				Save
	Name:	West Door Controller			
eneral	Enabled:				
	Trusted:				
	Network Settings				
	Address:	192.168.1.48			
	Port:	8765			
	Door Settings				
	Online Door:	None			
		None	<b>¥</b>		
	Firmware Settings	Front Door			
	Current Firmware:	Mikes Demo Proxess Test Door			
	Update Firmware:		UPDATE		
	Status: Disconnected			ACS Address: cloud	
	Statua Concernitectes			ACC Doct: 0/121	

#### Ready Operator: rschorr

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.

Proxess Access Control System										
← Access CONTROLLERS										
		NAME	HOST PORT	TRUSTED	NABLED	FINGERPRINT	STATUS	FIRMWARE	HARDWARE	
		Online Controller #1	192.168.1.21 8765	<b>V</b>	~	976525de5ad2e91e8e5bee25e7085813ab5db7c5	Disconnected	v0.1.2	v1.0	
	0/0	Main Door Controller 1		✓	<b>V</b>	c181e03b8368b8098186b12f2e94ea10d5145320	Disconnected			
		SparkFun-UART	192.168.1.47 8765	~	~	80db5d592ef2469bc3c90290731650b5cd9f90e7	Disconnected			
	C 🖊 📜	West Door Controller		✓	V	1cb17c9ab6479ab7a4e770f738e43b83ca0f23f5	Disconnected			
		South Door Controller	192.168.1.67 8765	✓	~	7cc49bce4d6a68812ecb99d6dd5e10fab2d68072	Disconnected			
				Advanced Search	Relo	ad Export				
eady Operator: rschorr										

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

Proxess AxessIQ™	E	=  ♠	\$ ⊡	<b>*</b> (	- = ×
← Controllers WEST DOOR CONTROLLER > 0	GENERAL				Save
General Offline Doors	Name West Door Controller Fraidect   Trusted				
	Network Settings           Address:         192:168.148           Port:         8765				
	Door Settings Online Door: MC Entry +				
	Firmwark Settings Context Firmware Update Update Update				
	Advanced Debug Logs: Pull Latest Debug Logs Retrieve Controller Password				
	Status Disconnected		ACS Addre ACS Pc	ss: cloud1. rt: 8031	

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

		P <sup>™</sup> Proxess AxessIQ <sup>™</sup>	≡!♠!¢!₿!♥!-
oxess AxesslQ™	≡! <b>#</b> ! <b>\$</b> ! <b>\$</b> ! <b>\$</b> ! = □ ×	← Controllers	
		WEST DOOR CONTROLLER > OFFLINE DOORS	
T DOOR CONTROLLER > GENERAL	Save		
Name: West Door Controller		General Offline Doors	
Enabled:		Offline Doors	
ne Doors			
Network Settings			
Address: 192,168,1,48			
Port: 8765			
Door Settings			
Online Door: MC Entry +			
Firmware Settings			
Current Firmware:			
Update Firmware:			
Advanced			
Debug Logs: Pull Latest Debug Logs Retrieve Controller Password			
Change Disconnected	ACS Address should prove nom		
Joins Deconnecto	ACS Port: 8031		
		Ready Operator: Administrator	

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.

A Proxess AxessIQ <sup>™</sup>		≡i♠i¢i⊕i∜i- ▫ ×
( Cambralliana		
		Sec.
WEST DOOR CONTROLLER		Save
Conoral		
General	Offline Doors	
Offline Doors	Assign Offline Door: None +	
	100s Mechanical Room	
	Adams Test Door	
	Hais Commode	
	ASR Plaza	

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 dropdown list.



<sup>•</sup>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.

The **benefit** to the operator is to minimize keystrokes when assigning rights to each card. Ideally, spending time up front to create thoughtful Access Profiles could result in just a single right being assigned to each credential, as opposed to numerous Door Groups and Doors needing to be added to every credential.

ProxessIQ™	ALL ORGANIZATIONS						Proxess Access Control System	≡!♠!\$*!₽!\$*!- • :
Dashboard Ac	cess Admin Repo	orting Cloud					← Access	
Doors	Users	A Toor Groups	Credentials	Calendars	<b>Čt)</b> Time Schedules	Access Profiles	ACCESS PROFILES	Search Access Profiles 🔊
trollers	System Operator	System Operator Roles	من المعامل Mobile Devices	Settings	Logs	Mobile Credentials	<ul> <li>✓ Management</li> <li>✓ Office Staff</li> </ul>	± /
tifications	Cloud Settings						<ul> <li>✓ Woodland Park Ops\Maint</li> <li>✓ Woodland Park Student</li> </ul>	t / t /
Operator: Adminis	rofiles cor	mbine Tir	ne Sched	ules and	Doors (an	d Door	Ready Operator: Ischorr For a quick edit note, if there is	one, click an existing Access Profil
Groups) or edit th	together a nem, click	and can tl the "Acco	hen be as ess Profile	signed to es" icon.	o Users. To	o create		

7

Proxess Access Control System					🏟   🗗   🖤	= = ×
← Access						
ACCESS PROFILES						
Cranto Neur Accors Drafila					Search Access P	rofiles O
+ Cleate New Access Profile						~ ~
🕑 Demo Access Profile						<b>a</b> /
<ul> <li>Management</li> </ul>						亩 🖌
			_			
<ul> <li>Office Staff</li> </ul>						
ACTIONS NAME TY	YPE TIMESCHEDULE	FIRST PERSON IN	TOGGLE	PASS THROUGH		
All DATA Office Doors Doo	or Group Sometimes					
Front Door Doo	or Morning Shift		_	_		
Demo Door Doo	or Always		Sec.			
+ Add Door + Add DoorGroup						
Woodland Park Onc) Maint						<b>a</b>
( Woodland Park Student						<b>n</b> /
Ready Operator: rschorr						.4

Change the name and click "Apply".

Edit Access Profile

Apply Cancel

HQ Staff

亩

T T

Click the Edit icon.

Access Profiles - 1

Access	← Acce	SS	
CESS PROFILES	ACCESS	PROFILES	
+ Create New Access Profile	Search Access Profiles	e New Access Profile	Search Access
) Demo Access Profile	🗊 🖌	o Access Profile	
) Management	💼 🖌	agement	
) HQ Staff	ti 🖌	se Staff	
ACTIONS NAME TYPE TIMESCHEDULE FIRST PERSON IN TOGGLE PASS THROUGH			
III DATA Office Doors Door Group Sometimes			
Add Door + Add DoorGroup	(⊙ Woo	dland Park Student	
୧) Woodland Park Ops\Maint	<b>i</b> /		
Woodland Park Student	<b>*</b>		
	at Ready Operat	or rschorr	

Proxess Access Control System	≡   ♠	🌣 i 🕞 i	🖤 I 🗕	= ×
← Access				
ACCESS PROFILES				
New Access Profile Name Create Cancel		Search Ac	ccess Profiles	ρ
⊙ Demo Access Profile			亩	1
⊙ Management			Ō	/
⊙ HQ Staff			Ť	1
⊙ Woodland Park Ops∖Maint			۵.	/
			莭	/
dy Operator: rschorr				

Access Profiles - 2

Enter a name for the new Access Profile and then click "Create".

Proxess Access Control System	≡! <b>:</b> ;;::::::::::::::::::::::::::::::::::
← Access	
+ Create New Access Profile	Search Access Profiles D
🕑 Demo Access Profile	t /
⊙ Management	ti /
(→) HQ Staff	ū /
⊙ Woodland Park Ops∖Maint	t /
⊙ Woodland Park Student	t /
O ganing Crews	ti /
ady Operator, rschorr	

The new Access Profile appears. Click the dropdown arrow to view and edit the details.

Proxess Access Control System		Proxess Access Control System	
← Access		← Access	
ACCESS PROFILES		ACCESS PROFILES	
+ Create New Access Profile	Search Access Profiles O	+ Create New Access Profile	Search Access Profiles
⊙ Demo Access Profile	ŧ /	(V) Damo Access Profile	All DATA Office Doors Demo Door Group 1
	ā /	Door Group Privile	ge Assignment
⊙ HQ staff	ti /	Door Group Select	Door Group - Woodland Park Doors
⊙ Woodland Park Ops\Maint	ŧ /	First Person In Toggle Pass Thro	vgh Lockdown AlWays DATA Test Schedule 1
	ti /		DATA Test Schedule 2 Deliveries
<ul> <li>Cleaning Crews</li> </ul>	± /	Apply Cancel	Morning Shift Never
ACTIONS NAME ITYPE TIMESCHEDULE FIRST PERSON IN TOGGLE PASS THROUGH		ACTIONS NAME TYPE TIMESCHEDULE FIRST PERSON IN TO	GGLE PASS THROUGH
+ Add Door + Add DoorGroup		+ Add Door + Add DoorGroup	
To add a Door Group to the new Access Profile	a click "Add Door	Use the drondown arrows to se	lect the Door Group to add alc
Group"	S, CIICK AUG DOOI	with the corresponding Time Se	chedule that those doors will c
Sloop .	/	within Check any of the feature	es that can be used at those do
		appropriately designated cardh	olders\Lisers, and click "Apply
Proxess Access Control System			
← Arcess		← Access	
ACCESS PROFILES		ACCESS PROFILES	
+ Create New Access Profile	Search Access Profiles D	+ Create New Access Profile	
⊙ Demo Access Profile	<u></u>	Damo Access Brofile	
0.0		Door Privilege Ass	ignment
		Door Select Door -	*
HQ Staff	ā 🖌	Time Schedule Real Door :17:28:1 Real Door :17:28:1	2
⊙ Woodland Park Ops\Maint	± /	First Person In T Rob's Office	
(→) Woodland Park Student	<u>ă</u> /	TaylorDemo Tom's Office	-
	<b>*</b> /	Apply Cancel	
Cleaning Crews			
Cleaning Crews     ACTIONS NAME TYPE TIMESCHEDULE FIRST PERSON IN TOGGLE PASS THROUGH		ACTIONS NAME TYPE TIMESCHEDULE FIRST PE	RSON IN TOGGLE PASS THROUGH
Cleaning Crews     ACTIONS NAME TYPE TIMESCHEDULE FIRST PERSON IN TOGGLE PASS THROUGH     All DATA Office Doors Door Group Sometimes	•	ACTIONS NAME TYPE TIMESCHEDULE FIRST PE	RSON IN TOGGLE PASS THROUGH
Cleaning Crews     ACTIONS NAME TYPE TIMESCHEDULE FIRST PERSON IN TOGGLE PASS THROUGH     AII DATA Office Doors Door Group Sometimes     AII DATA Office Doors Door Group     Add Door/Group     Add Door/Group	H	ACTIONS NAME TYPE TIMESCHEDULE FIRST PE	RSON IN TOGGLE PASS THROUGH
Cleaning Crews     ACTIONS NAME TYPE TIMESCHEDULE FIRST PERSON IN TOGGLE PASS THROUGH     All DATA Office Doors Door Group Sometimes     All Door     Add DoorGroup	•	ACTIONS NAME TYPE TIMESCHEDULE FIRST PE	RSON IN TOGGLE PASS THROUGH

Access Profiles - 3

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".

+ Create N	lew Access Profile						Search /	Access Profile
🕑 Demo	Access Profile							
🕑 Manag	ement							
🕑 HQ Sta	ff							
🕑 Woodl	and Park Ops\Mai	nt						
⊙ Woodl	and Park Student							
🔿 Cleanii	ng Crews							
ACTIONS	NAME	ТҮРЕ	TIMESCHEDULE	FIRST PERSON IN	TOGGLE	PASS THROUGH		
Ū	All DATA Office Doc	ors Door Grou	p Sometimes					
南	Server Room	Door	Sometimes	<b>~</b>				

Access Profiles - 4

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

**PHYSICAL** Credentials (including cards, fobs and coin & portrait stickers) are addressed in this section. **Mobile Credentials** are addressed in the following section.

		≡ ♠ ◙ ₽ - □ ×	Proxess Access Control System	≡ (♠ (♣ (┣) ♥) - ▫
	Dashboard Access Admin Reporting Cloud	-	← Access USERS	
			Filter by	Search Users
	Doors Users Door Groups Credentials	Calendars Time Schedules Access Profiles	Type International Internation	tom@datausa.com
			Blocked Difference Schorr Robert	rob.schorr@yahoo.com
	Controllers System Operator Roles Mobile Device	i Settings Logs Credentials	Saved Searches V L / Thunder Darold	demo user 1@provess.com
			Contraction of the second seco	tended demo.user2@proxess.com
ial,	Notifications and Cloud Settings	*		Addrossed at the
nt				<pre>/ end of this chapter.</pre>
de				Relaad Evoort
Le la	Ready   Operator: Administrator	4	Ready   Operator: rschorr	
	The Users module is where we ad Cardholders and credentials. The door groups are also definer here	d and edit new Users\ ir rights to access doors and . Click the "Users" icon.	From the main Users screen you ca individual cardholders. The list can one or both of the boxes on the lef and Users can be searched for by ty	n edit, delete and block be filtered\sorted by checking t: "Lockdown" and "Blocked" /ping letters in their name in
n n			the Search box. Click "Add New Us	er" to do so.
	Proxess Access Control System	≡ <b>!</b> ♠!\$!⊡!\$! - • ×	Proxess Access Control System	
	← Users Geraci, Angelo > general	Save	← Users New User > GENERAL	
	General	rst Name Angelo Access Blocked:	General	
	Credentials	iddle Name: Knife	- A A A A A A A A A A A A A A A A A A A	
	Access Audit	ternalid:	User Saved	
	Logs add photo	n Number:	The user changes have been saved	
		tented Opening:		
	Note: A name must	otes:		Notes:
	first be saved before a photo can be			
	added to it.			

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.

	= 1 1 4 5 1	× Proxess Access C	Control System	≡ ♠   \$   ⊡   \$   -
← Users		← Users		
GERACI, ANGELO > GENERAL		Save GERACI, ANGELO	• > CREDENTIALS	
General	First Name Angelo Access	s Blocked: 🗌 General	+ Add New Credential	
Credentials	Last Name: Geraci Middle Name: Knife	Credentials		
	Username			
Access Audit	External ld:	Access Audit		
Logs	Pin Number:	Logs		
	Emait			
	Extented Opening:			
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			Reload Blacklist All Credentials	
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- Users SERACI, ANGELO > CREDENTIA	LS > NEW CREDENTIAL	Save
General	Not Assigned to Card Name: Credential	Revalidation Date: 5/12/2017
Credentials	Activation Date: 5/12/2017	lential us: Blacklist
Access Audit		Other Active Returned
Logs		Lost Deactivated

Adding New Users & Credentials - 2

Process Access Control System
Credentials
Credential Saved
Credential Changes have been saved

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".



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".



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" to complete the process.

The card programming process is now complete.



From the previous screen, this verification screen appears. Click "OK".



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.

Proxess Access Control System						Ę	≡∣ <b>☆</b> ∣ <b>≎</b> ∣[	B   🖤   -	
Jsers <b>RACI, ANGELO &gt;</b> CREDENTIA	LS > (CREDI	ENTIAL)						Write to Card	Save
eneral	ᅙ Not	Assigned	to Card	Name: Creden	ial	Reva	alidation Date:	5/12/2017	<b>A</b>
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	ti di seconda di second	Every Door	Door Grou	Morning Shift					

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.



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.

Seneral	DOOR CREDENTIAL NA	ME ASSIGNMENT TYPE	VIEWS	
Serierai	Rob's Office Credential	Credential	ሐ	
redentials	Front Door Credential	Access Profile	ሐ	
access Audit				

For a list of all of the recorded Events for a User, click "Logs".

Proxess Access Control System				≡(♠)‡ ⊡ \$	
← Users GERACI, ANGELO > LOGS				Ŭ	
General	Date Range	Select a date 🟦 To	Select a date 🚻 Go		
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A 11.	1	4/12/2017 3:06:47 PM	4/12/2017 11:06:47 AM	CREDENTIAL_UPDATE	(Credential-70
Access Audit	1	4/12/2017 2:34:51 PM	4/12/2017 10:34:51 AM	CREDENTIAL_UPDATE	(Credential-70
	1	4/10/2017 8:13:44 PM	4/10/2017 4:13:44 PM	ACCESS	Real Door :08:1
Logs	1	4/10/2017 8:13:41 PM	4/10/2017 4:13:41 PM	MECHANICAL_KEY_ACCESS	Real Door :0B:1
	1	4/10/2017 8:13:23 PM	4/10/2017 4:13:23 PM	ACCESS	Real Door :08:1
	1	4/5/2017 7:03:34 PM	4/5/2017 3:03:34 PM	ACCESS	Real Door :0B:1
	1	4/5/2017 6:55:37 PM	4/5/2017 2:55:37 PM	DOUBLE_SWIPE_READER_TOGGLE_UNLOCK	Real Door :0B:1
	1	4/5/2017 6:55:31 PM	4/5/2017 2:55:31 PM	ACCESS	Real Door :0B:1
	1	4/5/2017 6:54:55 PM	4/5/2017 2:54:55 PM	DOUBLE_SWIPE_READER_TOGGLE_UNLOCK	Real Door :0B:1
	1	4/5/2017 6:54:50 PM	4/5/2017 2:54:50 PM	ACCESS	Real Door :08:1
	1	4/5/2017 6:54:33 PM	4/5/2017 2:54:33 PM	ACCESS	Real Door :08:1
	1	4/5/2017 6:54:17 PM	4/5/2017 2:54:17 PM	ACCESS	Real Door :0B:1
	1	4/5/2017 6:54:10 PM	4/5/2017 2:54:10 PM	DOUBLE_SWIPE_READER_TOGGLE_UNLOCK	Real Door :08:1
	1	4/5/2017 6:54:04 PM	4/5/2017 2:54:04 PM	ACCESS	Real Door :0B:1
	1	4/5/2017 6:54:00 PM	4/5/2017 2:54:00 PM	DOUBLE_SWIPE_READER_TOGGLE_UNLOCK	Real Door :08:1
	Reload	Export			

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 roturn

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		1	莭	Kagen	Vitaly		vkagen@aaa-avad.com		Global		
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### **Advanced Searches of Users**

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		1	Ī	Cobb	Scott		scobb@eyeonis.com		Global		
		1	Ī	CoreMK	SwitchTech				Global		
		1	Ī	Darion	KB NE		dstone@kelleybros.com		Global		
		1	Ī	Earney	Dexter		earneyde@gvsu.edu		Global		
		1	Ī	Gia	MAd		mgiardina@arcsgalloway.org		Global		
		1	Ī	Но	Dawn		dawn@getseam.com		Global		
		1	Ī	Kagen	Vitaly		vkagen@aaa-avad.com		Global		
		1	Ī	Kazemi	GrandDad	MontessoriSan	emaildadm		Global		
		1	Ī	Koledo	Chris		ckoledo@kelleybros.com		Global		
		1	Ī		Steven				Global		
		1	Ī	Manager	Maintenance				Global		
		1	Ī	McGrory	James		james.mcgrory@la-montessori.		Global		

### Within each User record

Eile Window Access Admin Reporting Cloud About USERS Filter by Advanced Search Contains Last Na AND (Exclusive) Save ACTIONS LAST NAME FIRST NAME MIDDI E NAM ORGANIZATIONS Global ilob Maya Global Global Scott Global SwitchTe Global KB NE Globa Global Global MAd Global Daw Export Import

## Must cancel "X" an Advanced Search, or the User menu will continue to only show those results.

- Access USERS										
ilter by	Adv	ance	ed Se	earch						
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			m	Но	Dawn		dawn@getseam.com		Global	

### **Advanced Searches of Users**

ProxessIQ <sup>™</sup> ALL ORGANIZA	TIONS		*		≡ I1	A 100   D   -	o ×
Eile Window Access ∆dmin Rep ← Access USERS	orting	Cloud	About				
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### Within each User record

USERS					
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				Delete Selected Reload Export Import	
Ponda Dourstor Administrat			Ready Operator: Administrator		

Name this search for your future use and click "OK".

Your new custom search will now appear in this list, for later execution by this and other operators. When you have completed your Search, you must click "X" to bring you back to the full list of Users, or the User menu will continue to only show those Search results.

USERS						1. A.
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Filter by	+ Add New User				Search Users	P Filter
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		Kagen	Vitaly		vkagen@aaa-avad.com	
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	🗆 🖊 🛅	Koledo	Chris		ckoledo@kelleybros.com	
	🗆 🖍 💼		Steven			
		Manager	Maintenance			

You are now returned to the full list of Users. You may execute on that saved search again any time, by clicking on the arrow next to its name.

ProxessiQ <sup>™</sup> ALL ORGANI	ZATIONS •	≡ 🛦 🖸 🕞 –
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ordy Operator Administrator		

You may Export the search results to a .csv for further manipulation and click the "X" and return to your normal system work.

# USERS Adding & Editing

Mobile Credentials are addressed in this section. PHYSICAL Credentials (including cards, fobs and coin & portrait stickers) are addressed in the previous section. Prior to entering and delivering mobile keys to Users, consider communicating to them the expected email they will receive and the installation process. This will result in fewer support calls and a better user experience.

The following is an example from a Proxess customer you may use as a model. An editable copy will be sent upon request,

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From: paul.hevesv@proxess.com <paul.hevesv@proxess.com < Date: Thursday, May 11, 2023 at 5:56 PM To: Robert Schorr <<u>rob.schorr@proxess.com</u>> Subject: Proxess Mobile Key Welcome Email

Dear [End User Staff & Team Members] -

This email is to inform you of our exciting new security system designed to more effectively control access to our facilities that will allow you to use your mobile phone as your key!

Your new "key" is an app that needs to be downloaded to your phone. Our new system will leverage Bluetooth from your phone to grant you access.

HERE ARE THE STEPS YOU WILL NEED TO FOLLOW:

STEP 1: Download the "Proxess Mobile Credential" App TODAY from the appropriate app store here:

# Download on the App Store



IMPORTANT: Once you download the app to your phone please <u>DO NOT TAKE</u> any further action until you have received an email invitation from "Proxess (no reply)" to your company/personal email.

STEP 2: Once the new security system is fully installed and programmed, you will be added to the system as a user. As part of the process, you will receive an email invitation from "Proxess (no reply)" to your company/personal email that looks like the image below.

roxess (no-reply) «no-reply@proxess.com» c: sample@proxess.com	Today at 4:41 PM
Proxess	
Invitation	
You have been invited to use Proxess Mobile by Proxess Texas Demo. Proxess Mobile users to use their phones as access credentials.	e enables
1. Download the Proxess Mobile app from the appropriate app sto	ore.
2. Once the app is installed, open the link below on your mobile dev	vice.
Here are some things to note:	
<ul> <li>You must use this email address to retrieve your credentials. If you need to use a email address you must have the ACS administrator change your address in the</li> <li>The link below expires in 30 minutes and can only be used once.</li> <li>You must be able to click the link from the mobile device running the mobile creater app for authentication to work.</li> <li>Don't worry, you can request a new email to be sent from the app. If you uninstall the will need to request another link.</li> </ul>	e different system. dential e app you
OPEN THIS LINK	

STEP 3: While using your mobile phone to locate the email invitation, open the Proxess (no reply) email and scroll to the bottom of the email and tap "OPEN THIS LINK"

This will authenticate your mobile key by taking you directly to the Proxess Mobile Key app on your phone.

That's it! In a separate communication you will receive further information on how to use your new mobile key!

NOTE: You can also watch a <u>How To Download Your Proxess Mobile Credential For The 1st</u> <u>Time video here</u>

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ProxessIQ™					<b>A</b> i	<b>\$</b> 10	<b>}</b> ∣.		×
← Users MANAGER, FACILITIES > GENER	tAL							Save	
General		First Name:	Facilities						
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		Username:							
Access Audit		External Id:							
Event Logs		Validation Period:	60 Use Default: 📝						
	<b>N</b>	Pin Number:							
		Email:	rob.schorr64@gmail.com						
	add photo	Extended Opening:	<u> </u>						
		Notes:							

Now that the new user has been created and 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.

Manager, Facilities > Credentials > Credential Write to Care S	ive
General Remote Mobile Device Enrollment Any	
Credentials	
Access Audit	
Event Logs	

The Credential status screen appears.

You may (but do not need to) add a name for this User's credential.

Check the box to identify it as a Mobile Credential. Click "Save"

ProxessIQ™					\$	Gel -	• ×	
← Users MANAGER, FACILITIES > CRE	EDENTIALS							
General	+ Add New C	redential						
Credentials								
Access Audit								
Event Logs								
	Reload	Blacklist All Credentials						ſ

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



You may now assign Privileges (a.k.a. access rights) for this Mobile Credential, as defined in the previous section.

In this case we will assign the Privilege for this credential to access the Door Group Engineering Department, during the Time Schedule Always and the individual Door Lakeside, South, also during the Time Schedule Always.

When you are done, click "Save" and the mobile credential email invitation will be delivered to the recipient.

Toggle & Lockdown views will be shown in a few pages from here.

The User will receive the automated invitation email, which displays the links (one for App and one for Android devices) to click to download the Proxess Mobile Credential app. Tap "Open" or from the screen you place your app onto, tap on the "Proxess" icon to open the Mobile Credential app.



Adding New Users & Mobile Credentials -

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The Mobile Credential app will open in "Easy Unlock" mode, where it will automatically find and display the door with the greatest signal strength (usually the closest door as well). Tap the "Open" button for the door you wish to access and it will unlock. For the best user experience, open your app on your approach to the door, so the app has already displayed the door and you have already tapped Open, prior to your arrival at the door handle.



When creating a Mobile Credential, you may assign Toggle rights. In this case, the "Toggle Unlocked" and "Toggle Locked" buttons will display. Toggled locks remain Unlocked (no credential required to enter) until either Toggled Locked or until the next Time Schedule occurs requiring the lock to be in the locked (valid credential required to enter) state.



When creating a Mobile Credential, you may assign Lockdown rights. In this case, the "Enter Lockdown" and "Exit Lockdown" buttons will display. You can also assign normal, Toggle and Lockdown rights on the same Mobile Credential (see image to the right).

When the lockset has entered the Lockdown mode, a note in red will display. Once removed from the Lockdown mode the note will be removed.

the Locked mode the "Open" button will again display.



Mobile Credentials - 5

By default, the Mobile Credential will open in the "Easy Unlock" mode. In this mode, the app will automatically locate and display the door with the greatest signal strength... Tap the hamburger icon in the top left to being up the mode menu. Click on the "Access" mode and all of the Organizations that you have rights for access will be listed. Tap on the organization you want to see your rights for.

Your credential name will display, along with the list of doors that you have access to. For applications allowing temporary offline operation, there is a 5-minute check-in requirement for the mobile credential to get online to reverify its rights and the countdown is shown in green text. When the credential rights expire a note in red appears "Invalid (Needs to be refreshed)". Bring the phone online (via WiFi or a mobile network) and the rights will be renewed for five (5) more minutes. Click the hamburger icon to return to the Easy Unlock operation.



# USERS Spreadsheet Adding & Editing

How to MASS-Add and edit Users & Credentials using a .csv spreadsheet
# ort Utility- 1

## Mass Adding and Editing Users using a .csv spreadsheet

← Access USERS										
Filter by		+ /	dd Ne	w User					Search Users	
			ACT	IONS	LAST NAME	FIRST NAME	MIDDLE NAME	EMAIL		
			1	莭	124	Borden				
Department Search 🔶	۵.		1	Ŵ	Admin	Super		fake@		
			1	ŵ	Ba	Maya		baldewiczm@we	sterntc.edu	
			1	莭	Bartee	Carl		cbartee@fbcgler	harden.org	
			1	莭	Cabb	Scott		scobb@eyeonis.	com	
			1	Ŵ	CoreMK	SwitchTech				
			1	Ŵ	Darion	Nelly		dstone@kb.com		Scienc
			1	莭	Earney	Dexter		earneyde@gvsu	edu	
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			1	Ŵ		Dawn		dawn@getseam	com	
			1	Ŵ	Kagen	Vitaly		vkagen@aaa-av	ad.com	
			1	Ŵ	Kazemi	GrandDad	MontessoriSanClemente Childish1 Childish2 Childish3	emaildadm		
			1	Ŵ	Koledo	Chris		ckoledo@kelleyt	pros.com	
			1	Ŵ		Steven				
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			-	<u></u>	MeGroni	Inmor		inmor montonull	la montoerori con	

To make mass User additions, changes or deletions, there will never be a security system interface easier to use that Microsoft Excel

#### Import List

4	A	в	С	D	E	F	G	Н	I J	к	L	M	N	0	р	Q	R	S	т	U	v	
1	ExternalId Firs	tName La	astName I	MiddleName U	IserName	Email	PinCod	e ExtendedOpening N	otes OrganizationGui	d ShareWithChildrenOrgs	CredentialName	CredentialActivationDateTime	CredentialExpirationDateTime	EnableMobileCredentia	I AccessProfileList	CredentialPrintedNumber	CredentialStatus	BlockList	Removel	ForceUpdat	e ImportStatus	1
2	Ang	elica Al	ltadena			tadenala@hp.com		FALSE	00000000-0000-0	DOI FALSE	Tom Mobile   Tom Lockdow	n 5/18/2023 0:00	5/18/2026 0:00	TRUE	Bldg1 Principal		Other	FALSE	FALSE	FALSE	ReadyForImport	
3	Joh	nathan Fi	itzpatrick			jfitz@stateu.com		FALSE	00000000-0000-0	DOC FALSE	John Fob   John Mobile	5/18/2023 0:00	5/18/2026 0:00	TRUE	Frosh Dorm   Gym   Big	<b>b</b>	Other	FALSE	FALSE	FALSE	ReadyForImport	
4	Joh	nathan W	Veismuller			johnnyswims@k12.va.us		FALSE	00000000-0000-0	DOC FALSE	Credential	5/18/2023 0:00	5/18/2026 0:00	TRUE			Other	FALSE	FALSE	FALSE	ReadyForImport	
5	Cla	udia Ci	audillo			Claudia.Caudillo@gmail	.com	FALSE	00000000-0000-0	DOC FALSE	Credential	5/18/2023 0:00	5/18/2026 0:00	TRUE			Other	FALSE	FALSE	FALSE	ReadyForImport	
6	Lore	ena V	eracruz			veracruzs@yahoo.com		FALSE	00000000-0000-0	DOC FALSE	Credential	5/18/2023 0:00	5/18/2026 0:00	TRUE			Other	FALSE	FALSE	FALSE	ReadyForImport	1
7	Vio	et M	lorrison			v.morrison@proxess.inv	aild	FALSE	00000000-0000-0	DOC FALSE	Credential	01/01/0001 00:00:00	01/01/0001 00:00:00	FALSE			Other	FALSE	FALSE	FALSE	ReadyForImport	
8																						
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					4	A B	C	D	E	+	G H		K A									
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2		124	Borden				Global			FALSE		
3		Admin	Super		fake@		Global			FALSE		
4	684f1dca-a3c0-	Altadena	Angelica		tadenala@hp.com		Global			FALSE		
5		Ba	Maya		baldewiczm@westerntc.edu		Global			FALSE		
6	horse and the more than	Bartee	Carl		cbartee@fbcglenarden.org		Global			FALSE		
7	368c6807-55d9	Caudillo	Claudia		claudia.caudillo@gmail.com		Global			FALSE		
8		Cobb	Scott		scobb@eyeonis.com		Global			FALSE		
9		CoreMK	SwitchTech				Global			FALSE		-
	< > U	sers_2024-05	-04-075234	+			•				Þ	.]

# USERS

# Encoding & Wiping Cards/Fobs/ Wristbands/Stickers

# with the ProxessIQ<sup>™</sup> Software

#### Encoding Physical Credentials using the ProxessIQ<sup>™</sup> Software



A credential (card, keyfob, sticker, watchband) must first be created in the software and then it can be encoded with the software, by plugging a n Enrollment Reader (ENR) into a USB port (USB 3.0 is optimal) the local PC that the client software is installed on. Note that the enrollment reader will not work on a virtual client.

Go to the Users menu.

Add a User and then add a Credential (as shown in a prior section).

Assign the rights to be assigned to that credential and click "Save".

The "Write to Card" button will become illuminated, enabling the encoding process.

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					← Users			$\frown$
MORRISON, VIOLET > GENER	RAL			Save	MORRISON, VIOLET > CREDEN	NTIALS > CREDENTIAL	wa	ite to Care Save
Conoral		First Name:	Violet		Caparal	Rot Assigned to Card Name: Violet's Card	Remote Mobile Device Enrollment	. 💛
General		Last Name:	Morrison		General	Activation	Crestential	
Credentials		Middle Name:			Credentials	Date: 4/30/2024 12:00:00 AM [E] Date: 4/30/2025 11:59:59 P	M E2 Status: Active Blocklist: Mobile Credential:	
A A PA		Username:	Science Department		A second A sufficient			
Access Audit		External Id:	17f44180-ac52-4dca-af1a-58a44f208bf8		Access Audit	Access Prohies (Innerited Privileges)		
Event Logs	11	Organization	Global   Global  Globa		Event Logs	Add Access Profile		
	add photo	Validation Period:	1000 Use Default:					
		Pin Code:				Direct Privileges		
		Email:	v.morrison@proxess.invaild			ACTIONS CHIE TYPE TIMESCHEDULE HIRST	PERSON IN TOGGLE PASS THROUGH LOCKDOWN	I
		Extended Opening:				All American Classroom Door General Staff		
		Notes:				+ Add Door		

#### NOTES for SUCCESSFUL CREDENTIAL ENCODING, READING & DELETING

- Ensure the enrollment reader (ENR) is connected to a USB 3.0 (preferably) port on the administrator computer.
- Always keep credentials 6" away from the ENR until you are ready to place one on the ENR (the ENR will try to read credentials that are close).
- Then, immediately place and hold the credential on the ENR until the read or encode or wipe (delete) sequence is complete. Waiting to place a credential will result in a time-out error on the software.
- Then, immediately remove the credential from the ENR.

e Window Access ∆dmin Report ⊂Users MORRISON, VIOLET > CREDE	ing Cloud About NTIALS > VIOLET'S CARD				Write to Card Save
General Credentials	Not Assigned to Card M Activation Date: 4/30/2024 12:00:00 AM	Name: Violet's Card Expiration Date: 4/30/2025 11	:59:59 PM î Credent Status:	note Mobile Device En	Mobile Credential:
Access Audit Event Logs	Access Profiles (Inherited Privilege ACTIONS   NAME   ORGANIZATIO + Add Access Profile	es) MS			
	Direct Privileges				
	Vehicle Gate	Door General Staff Door General Staff			



- If you are certain the credential (card/keyfob/sticker/watch) to encode has not already been encoded, then click on "Write to Card"
- Immediately place and hold the credential on the ENR until the blue LED appears and the screen to the right appears
- This shows the credential has been encoded with the rights shown and to card number shown.
- Remove the card from the ENR.
- You may now use the card on all of the doors that it has programmed for, during the allowed days and times.





To Wipe/Delete a credential, or if you are uncertain if the credential (card/keyfob/sticker/watch) to encode has already been encoded:

- Place and hold the credential on the ENR until the blue LED appears and the above pop-up window appears.
- Remove the card from the ENR.
- In this case, this card has been encoded with Violet's rights.
- Click "Wipe and Deactivate"
- Immediately place the card on the ENR until it Beeps and the LED turns green.

Cloud About IALS > VIOLET'S CARD Write to Card Gree Stamped Id: 000000000071753 Name: Violet's Card Revalidation D: Adjuston 450/2024 120000 AM (C) Experience 4/00/2025 115959 PM (C) Credented Access Profiles (Inherited Privileges) Access Profiles (Inherited Privileges) Access Profiles Direct Privileges Access Name Direct Privileges	Remain Extension of the second	Cloud About IALS > VIOLET'S CARD Stamped Id: 000000000071753 Activition Artivition Artivitita Artivitita Artivitita Artivitiita Artivitiita Artivitia Arti	Name:         Violet's Card           4/20/2005 11:59:59 PM         Credential Casture           MESCHEDULE         RRST PRESON IN	Revalidation D: Revalidation D: Revali	
Webck Gate Door General Sult     Ad American Classroom 1 Door General Sult	Activation: 4/28/2024 Experience: 4/28/2025 11:59 PM Samped tie: 00000000717/3 Edf Credential With: 6-rest location With: 6-rest location Pay text	Vehicle Gate Door O     Add Courterant Classroom 1 Door (     Add Court + Add Doorforege	ProcesiQ <sup>™</sup> ALLORGANZZAN     CUSETS     MORRISON, VIOLET > CREDI     General     Credentials     Access Audit     Event Logs	ENTIALS > VIOLET'S CARD  ENTIALS > VIOLET'S CARD   The second se	Image: Control of the second
			Ready Operator: Administrator		

#### Verifying and Deleting (Wipe) a Credential

	<ul> <li>■</li> </ul>		=   🖈   🖾	₿  -           ×
CUSERS	LS > VIOLET'S CARD			Write to Card Save
General	Not Assigned to Card Nam: Vio	olet's Card	Remote Mobile Device Enrollme	nt Any
Credentials	Activation 4/30/2024 12:00:00 AM III Expiration Date:	4/30/2025 11:59:59 PM 🔝 Statu	s: Active Blocklist Mobile Cred	Jential:
Access Audit	Access Profiles (Inherited Privileges)			
Event Logs	+ Add Access Profile			
	Direct Privileges			
	ACTIONS NAME TYPE T	IMESCHEDULE FIRST PERSON IN	TOGGLE PASS THROUGH LOCKDOWN	
	Image: Webicle Gate         Door         Gr           Image: Marcine Classroom         All American Classroom         Door         Gr           + Add Door         + Add DoorGroup         Gr         Gr         Gr	eneral Staff		
dy Operator: Administrator				

When the screen is next refreshed, it will note that this user is "Not Assigned to Card".

#### Better Practice to Delete (Wipe) Rights from a Credential



It is always better to first delete the rights for a credential, by clicking on the Trash Can icons, leaving the credential with no rights.

If the card is ever presented at an online reader, it will automatically be updated to have No door entry rights and will not be allowed into the door.

**Note:** If further action is desired, it is best Not to just delete a credential....**First**, Wipe the credential on an enrollment reader, or delete its Privileges/rights and have it presented to an online controller's reader, which will have its rights wiped. **Note:** It is also a best practice to have each card's Validation be configured to as few days as possible, ensuring that even if a rouge credential is presented to an offline lock, it will be rejected.

**Note:** If there no online doors, then check the Blocklist box for the credential and the Proxess Sync app must be presented to each offline lock that they had the rights to.

#### Can I Encode this Random Card & Assign it to Someone?

S > VIOLET'S CARD	This credential is not assigned to anyone.
Not Assigned to Card Name: Violet's Card     Remote Mobile Device	You can use the options below for assigning a credential.
Activation 4/30/2024 12:00:00 AM Ta Expiration 4/30/2025 11:59:59 PM Ta Credential Active • Bloodby	Select a user to assign this credential to:
Access Profiles (Inherited Privileges)	Assign New Credential To User   Assign New Credential
ACTIONS NAME ORGANIZATIONS     Add Access Profile	
Direct Privileges	Create a new user to assign the credential to:
ACTIONS NAME TYPE TIMESCHEDULE FIRST PERSON IN TOGGLE PASS THROUG	Create New User
t ✓ Vehicle Gate Door General Statt	Pop Out
+ Add Ubor + Add Ubordioup	X

- If you are uncertain if the credential (card/keyfob/sticker/watch) to encode has already been encoded, then first place and hold the credential on the ENR until the blue LED appears and the above pop-up window appears.
- Remove the card from the ENR.
- In this case, this card is not assigned to anyone
- You may now click "Write to Card" and place the card on the enrollment reader to encode it, resulting in the below screen, showing its success.

← Users MORRISON, VIOLET > CRE	DENTIALS > VIOLET'S CARD	Save	×
General	Stamped Id: 00000000071753 Name: Violet's Card	Ren assigning a	tial is not assigned to anyone. the options below for credential.
Credentials	Activation Date: 4/30/2024 12:00:00 AM E	Active Select a use	er to assign this credential to:
		rrison, Viol	let (Science Department) 🔻
Access Audit	Access Profiles (Inherited Privileges)	As	sign New Credential
Event Logs	+ Add Access Profile	Create a ne credential to	w user to assign the o:
		r L narr	Create New User
	ACTIONS PARME TYPE TIMESCHEDULE PIRST PERSON IN TOUS	<u> </u>	
			Pop Out



#### Another way to Encode a Card

You may choose to first enter Users in the system and then select an unencoded Credential to encode under that User, Remember that a User is typically a person and a several Credentials can be assigned to each User.

ProxessIQ™   ≥ <u>W</u> indow Access	ALL ORGANIZATIONS							×
								-
Jsers	Doors	Door Groups	Calendars	Credentials	CT.	Access Profiles	Controllers	
ystem Operator	System Operator Roles	<b>ج</b> Mobile Devices	Settings	Logs	Mobile Credentials	Notifications	Organizations	
loud Settings								•

From any screen in the system, take an unencoded card and place it on to the ENR. The light will turn blue and the pop-up window will appear.



Select a User's name that you have already entered into the system and click "Assign New Credential".

ProxessIQ <sup>™</sup> All ORGANIZATIONS		≡ I♠ I⊠ I⊖ I - □ × .
le <u>W</u> indow Access <u>A</u> dmin Reporting	Cloud About	
MORRISON, VIOLET > CREDENTI	ALS > NEW CREDENTIAL	( 🔤 )
General	Not Assigned to Card Name Credential	Remote Mobile Device Enrollment
Credentials	Activation Date: 5/18/2024 12:00:00 AM [1] Expiration 5/18/2025 11:30:00 AM [1]	Credential Active - Blockist: Mobile Cesential
Access Audit		
Event Logs		

The Add New Credential window opens. Optionally add a Name for it, in this case check the "Mobile Credential" box and click "Save".



Enter the information for their new credential (a mobile phone key in this case) and add their access rights as described in previous sections.



Enter the information for their new credential (a mobile phone key in this case) and add their access rights as described in previous sections.

ProxessIQ <sup>™</sup> All organizations		≡ ♠ ⊠ ₽ - □ ×
File Window Access Admin Reporting	Cloud About	
← Users		
MORRISON, VIOLET > CREDENTI	ALS > VIOLET'S MOBILE KEY	Write to G
General	Not Assigned to Card Name: Violet's Mobile Key	Remote Mobile Device Enrollment Any
Credentials	Activation Date: 5/18/2024 1200:00 AM 12 Expiration Date: 5/18/2025 11:30:00 AM 12 St	edential Active  Blocklist: Mobile Credential:
Access Audit	Access Profiles (Inherited Privileges)	
Event Logs	ACTIONS NAME ORGANIZATIONS + Add Access Profile	
	Direct Privileges	
	ACTIONS UNTEL TYPE TOTAL SUPPLY AND ACTIONS UNTEL TYPE	OGGLE PASS THROUGH LOCKDOWN
	Research Lab 4 Door Tu-Th	
	Add Loss - Add DoorGroup	
Ready Operator: Administrator Scioud Issue: Ba	l credential for "VioletMorrison(Science Department)" - Violet's Mobile Key 🔯 🗱	

Select their Door and Door Group Privileges. Remember to keep all credentials away from the ENR until this point. Now click "Save" and then click "Write to Card".

General	Stamped Id: 000000000071753 Name: Violet's Mobile Key Revalidation Date: 2/12/2027
Credentials	Activation Date: 5/18/2024 120000 AM (1) Epiration Date: 5/18/2025 11:3000 AM (2) Credential Status: Active • Blocklist: Mobile Credential
Access Audit	Access Profiles (Inherited Privileges)
Event Logs	ACTIONS NAME ORGANIZATIONS + Add Access Profile
	Direct Privileges
	ACTIONS NAME TYPE TIMESCHEDULE FIRST PERSON IN TOGGLE PASS THROUGH LOCKDOWN
	📋 🖍 Research Lab 4 Door Tu-Th
	All Classrooms Door Group General Staff
	ense sour - ense sources

Promptly place and hold a credential on the ENR (enrollment reader) until it beeps and it will have been encoded.

#### Pop-Out Window: Another way to Encode a Card

ProxessIQ <sup>™</sup> All ORGAN	izations 🔹		≡   ♠   🔛   🕞   - 💷 🛛 👋	ProxessiQ <sup>™</sup>   All ORGAN	ZATIONS •	≡   ♠	🛛   🕞   🚽 🗆 🗆 🗡	🔊 USB Device – 🗆 🛛
Eile Window Access Admin R	eporting Cloud About			Eile Window Access Admin R	eporting Cloud About			
← Access USERS			This contactial is not serienced to sevence.	← Access USERS				This credential is not assigned to anyone. You can use the options below for assigning a credential.
Filter by	+ Add New User	Search Users D	You can use the options below for assigning a credential.	Filter by	+ Add New User		Search Users D	
Crued Courses	ACTIONS LAST NAME FIRST NAME MIDDLE NAME	EMAIL		Caud Courting 94	ACTIONS LAST NAME FIRST NAME MIDDLE NAME	EMAIL	USERNAME ORGANIZA	Select a user to assign this credential to:
Sover Scortings	🗉 🖍 🛅 124 Borden	Î	Select a user to assign this credential to:	Sover Scortings	🗉 🖍 🛅 124 Borden		Global	Morrison, Violet (Science Departme -
Department Search 🔿 🛅	Admin Super	take⊕	rrison, Violet (Science Department) 🔻	Department Search 🔿 🛅	🗆 🖍 🛅 Admin Super	fake®	Global	Assign New Credential
	🗌 🖋 🛄 Altadena Angelica	tadenala@	Aution New Credential		🗋 🖉 🛄 Altadena Angelica	tadenala@hp.com	Global	
	Ba Maya	baldewiczn			Ba Maya	baldewiczm@westernto.edu	Global	
	□ 🖋 🛄 Bariade Carr □ 🖋 📅 Caudila Clustia	chardia cau				charteegibcgenaroen.org	Global	Create a new user to assign the
	Catalan Catalan	scabh®ea	Create a new user to assign the		Caturation Caturation	scobh®evenis.com	Global	credential to:
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	🗆 🖉 🛅 Darion Nelly	dstone@kt	Create New User		🗆 🖌 🛅 Darion Nelly	dstone@idb.com	Science Department Global	Create New Out
	🗆 🖌 🛅 Earney Dexter	earneyde@			🗆 🖋 🧰 Earney Dexter	earneyde@gvsu.edu	Global	
	🗆 💉 前 Fitzpatrick Johnathan	jfitz@state	No. And		🗆 🖋 前 Fitzpatrick Johnathan	jfitz@stateu.com	Global	
	🗆 🖍 💼 Gia MAd	mgiardinat	Pop Out		🗆 🖍 💼 Gia MAd	mgiardina@arcsgalloway.org	Global	
	🗆 🖍 🛅 Ho Dawn	dawn@get			🗆 🖍 🛅 Ho Dawn	dawn@getseam.com	Global	
	🗆 🖍 🛅 Kagen Vitaly	vkagen@a			🗆 🖍 🛅 Kagen Vitaly	vkagen@aaa-avad.com	Global	
	🔲 🖍 🛄 Kazemi GrandDad MontessoriSanClemente O	hildish1 Childish2 Childish3 emaildadm			🗌 🖉 🦉 Kazemi GrandDad MontessoriSanClemente Childish1 C	Thildish2 Childish3 emaildadm	Global	
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Ready Operator: Administrator 🛑 Clou	d Issue: Bad credential for "VioletMorrison(Science Department)" - Violet's Mobile Key	. 🖸 ¥	A	Ready Operator: Administrator Clou	I Issue: Bad credential for "VioletMorrison(Science Department)" - Violet's Mobile Key 🖸	*	đ	

Using the Pop-out window is an easy way to enroll/encode multiple credentials, after their User names have been added.

From any screen, place an unencoded/blank credential on the ENR (enrollment reader) and then click "Pop Out".

You will now have a separate window for encoding credentials. Click "Assign New Credential" and select the User from the drop-down list.



A New Credential window for the selected User will open.

Create a name for and add access rights for the credential, click "Save" and the click "Write to Card" and the card information will display.

Place the next blank/ unencoded credential on the ENR and repeat the process..

# USERS

# Encoding & Wiping Cards/Fobs/ Wristbands/Stickers with the ProxessSync app

## Encoding Physical Credentials using the Proxess Sync app



Any card that has been created in the software can be encoded in the field by any allowed Mobile Device (see this section in this manual) with the Proxess Sync app.

Go to the Users menu.

Add a User and then add a Credential (as shown in a prior section).

Assign the rights to be assigned to that credential.

Select a Mobile Device (or All of them) that will be allowed to create or edit this card.

	•			≡   ♠   🖾   🕒   - – – α – × .	ProxessIQ <sup>™</sup> ALL ORGANIZATIO	NS •	≡   ♠   ⊠   (	) –
Eile Window Access Admin Reporting	Cloud About				<u>Eile Window Access</u> Admin Report	ing Cloud About		
← Users MORRISON, VIOLET > GENERAL				Save	Users MORRISON, VIOLET > CREDE	NTIALS > CREDENTIAL		Write to Ca
General	- <u>R</u>	First Name:	Violet		General	Not Assigned to Card Name: Violet's Card	Remote Mobile Device Enrollment	$\neg \smile$
Credentials	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Last Name: Middle Name:	Morrison		Credentials	Activation Date: 4/30/2024 12:00:00 AM E	M EE Credential Active Blocklist: Mobile Credential:	
Access Audit		Username: External ld:	Science Department 17f44180-ac52-4dca-af1a-58a44f208bf8		Access Audit	Access Profiles (Inherited Privileges)		_
Event Logs	11	Organization	Global    Global   Global   Global   Global   Global   Global   Global   Global   Global   Global   Global   Global    Global   Global    Global    Global    Global    Global    Global    Global    Global    Global    Global    Global    Global    Global     Global     Global     Global     Global      Global      Global		Event Logs	ACTONS NAME ORGANIZATIONS     Add Access Profile		
	add photo	Validation Period: Pin Code: Email: Extended Opening: Notes:				Direct Privileges ACTONS Write Gate Winder Gate Winder Gate Winder Gate Add Reviewan Cleanroom Door General Staff Add Reviewan Cleanroom Door General Staff Add Reviewan Cleanroom Door General Staff	PESSON IN TOGGLE PASS THROUGH LOCKDOWN	

## Encoding Physical Credentials using the Proxess Sync app

E
Proxess Sync

Open the Proxess Sync app on your phone Plug an Enrollment Reader (ENR) into a power source: A wall plug, a USB (A or C) port of a PC, or your phone or tablet (Android and iPhone 15 and above)



Tap "Card Encoder" and make sure the Enrollment Reader (ENR) is within 12" for the initial connection. The screen will state that it is looking for the ENR. Once connected, the ENR can be up to 20' away.

Once bound to an ENR, the screen will state it is ready for a credential to be presented.



Tap the "Create" button and a list of all Credentials that this operator is allowed to encode is presented. Tap on the name whose credential you will encode and you will be prompted to place the credential on the ENR. Place the card on the face of the ENR for the entire enrolment process, until the LED turns green.

The blue LED shows the card is being encoded to that User's Credential. Please Remove the card from the ENR.

Encoding Cards with Proxess Sync- 2

icon.



To Verify a credential or to see who a credential belongs to, Click on the "Info" button. Then place a card onto the reader surface. The blue LED shows the card is being read and/or written to.



The credential information, including any stored photo of the User, will appear. Please Remove the credential from the reader.







To Wipe & Delete a credential, Click on the "Wipe" button. Then place a card onto the reader surface. The blue LED shows the card is being read and/or written to.

The screen will state that the credential has been successfully wiped. Please Remove the credential from the reader.





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).

									×
		Calendar							
		Calendar Name:							
		External Id:							
		Note:							
		Apply Cancel							
Dec	ember	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 2	21 22 23	24 25	26 27	28 2	9 30 1	n	

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 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.



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.

	= <b>A \$ B \$ − 8 ×</b>	Proxess Access Contro	l System	
		← Access		
		CALENDARS		
		+ Summer School	· / 0	
Calendar Event		< 2017 >		Weekday
Event Name:		N		M T W T F S S M T W T F
Labor Day		January	1 2 3 4 5 6 7 1	8 9 10 11 12 13 14 15 16 17 18 19 20
Notes:		February	1 2 3 4 5 6 7 8 9 10 11 1	2 13 14 15 16 17 18 19 20 21 22 23 24
		March	1 2 3 4 5 6 7 8 9 10 11 1	2 13 14 15 16 17 18 19 20 21 22 23 24 2
		April	1 2 3 4 5 6 7 8 1	10 11 12 13 14 15 16 17 18 19 20 21 2
Start End		May	1 2 3 4 5 6 7 8 9 10 11 12 13 1	<b>1</b> 15 16 17 18 19 20 21 22 23 24 25 26
Day: September 4 * 2017 Day: September 4 *	20	June	1 2 3 4 5 6 7 8 9 10 1	1 12 13 14 15 16 17 18 19 20 21 22 23 2
		July	1 2 3 4 5 6 7 8	10 11 12 13 14 15 16 17 18 19 20 21 2
Time: 07:00 (07:00 AM) • Time: 19:00 (07:00 PM) •		August		8 14 15 16 17 18 19 20 21 22 23 24 25 2 0 11 13 13 14 15 16 17 18 19 20 21 32
		October		8 9 10 11 12 13 14 15 16 17 18 19 20
Apply Cancel Delete		November	1 2 3 4 5 6 7 8 9 10 11 1	2 13 14 15 16 17 18 19 20 21 22 23 24
		December	1234567891	0 11 12 13 14 15 16 17 18 19 20 21 22

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.

A & B &

23 24 25 26 27 28 29 30 31

27 28 29 30 31

25 26 27 28 29 30 31



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.





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.



...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.



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



Click on the "Window" button, highlight "Theme" and then click on "Light".



From anywhere within the ProxessIQ program, the above Hot-Key shortcuts may be used to jump into that menu.

Eile Window Access Admin Reporting About

Dashboard Access Admin Reporting

Doors	Users	<b>E</b> Time Schedules	Door Groups	Calendars	Access Profiles
Controllers	System Operator	System Operator Roles	Contraction Mobile Devices	Settings	Event Logs

Proxess Access Control System	Proxess Access Control System	Proxess Access Control System
File Windo Access Admin Reporting About	File Window Acces Admin Deporting About	File Window Access Admit Reporting bout
Doors Control+Shift+D Reporting	System Operators Control+Shift+O	Dashboa Logs Control+Shift+L porting
Door Groups Control+Shift+G	System Operator Roles Control+Shift+R	
Users Control+Shift+U		
Calendars Control+Shift+C	Mobile Devices Control+Shift+M	
Time Schedules Control+Shift+T	Settings Control+Shift+S	
Access Profiles Control+Shift+A	Controller Firmware Control+Shift+M	
Controllers		•

The screen background is now changed to white and will remain so throughout the system until the background is changed back to "Dark".

le <u>W</u> indow Access	<u>A</u> dmin Re	porting	About				~		
← Access									
DOORS									
Filter by	2	+ Ac	ld New Doo	r				Search Doors	Q
			ACTIONS	NAME	LOCATION	TYPE	LAST UPDATE	CREATED	B,
Туре	~		/ 🖻	Adams Test Door	DATA's Office	Offline	2/20/2017 6:04:15	PM 2/20/2017 6:04:33 PM	1 0%
Online			/ 1	Debug_Lock_0B:31	DATA's Office	Offline	2/27/2017 6:02:04	PM 2/27/2017 6:02:28 PM	1 0%
Offline			1	Demo Door	Demo Location	Offline	2/6/2017 10:46:23	PM 2/6/2017 10:46:23 PM	1 0%
			/ 🖻	Demo Door 2	Demo Location	Offline	2/6/2017 10:46:23	PM 2/6/2017 10:46:23 PM	1 0%
Saved Searches	$\sim$		🖌 🗇	Front Door	DATA's Office	Online	2/10/2017 11:48:49	PM 2/10/2017 11:49:13 P	M 0%
		/ 🗖	Lock With Rolled Keys #1	DATA's Office	Offline	4/20/2017 4:03:55	PM 4/20/2017 4:04:40 PM	1 0%	
			1 🖻	Lock With Rolled Keys #2	DATA's Office	Offline	4/20/2017 4:06:10	PM 4/20/2017 4:06:59 PM	1 0%
			/ 🖻	Mikes Demo	DATA's Office	Offline	2/24/2017 4:53:11	PM 2/24/2017 4:53:25 PM	1 0%
			1	Mike's Toggle Lock	Demo Location	Offline	4/5/2017 6:59:07 PI	M 4/5/2017 6:59:49 PM	0%
			/ 🗖	Real Door :0B:1E	DATA's Office	Offline	3/8/2017 3:53:55 PI	M 3/8/2017 3:54:37 PM	0%
			/ 🖻	Real Door :17:28:11	DATA's Office	Offline	3/7/2017 10:24:13	PM 3/7/2017 10:25:15 PM	1 0%
			/ 🖻	Real Door :17:28:12	DATA's Office	Offline	3/7/2017 10:30:30	PM 3/7/2017 10:31:04 PM	1 0%
			1	Rob's Office	Richmond	Offline	2/19/2017 11:39:33	PM 2/19/2017 11:43:04 P	M 0%
			/ 🗖	Server Room	DATA's Office	Offline	2/10/2017 11:47:29	PM 2/10/2017 11:47:57 P	M 0%
			/ 🖻	TaylorDemo	DATA's Office	Offline	3/10/2017 4:03:24	PM 3/10/2017 4:06:12 PM	1 0%
			/ 市	Tom's Office	DATA's Office	Offline	2/10/2017 11:44:30	PM 2/10/2017 11:45:50 P	M 0%*

The Home icon is used from any screen in the system to bring you back to the Dashboard \ Home Screen.

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.

Proxess Access Control Syster File Window Access Admin Reporting About Dashboard Access Admin Reporting r ā, \*\* î de Users ime Schedules Σõ Ŷ III ļ 8 ettinas

From any screen in the system, you can shortcut to the "Settings" module with a click on the icon shown in the top taskbar.

e <u>w</u> indow Access <u>A</u> dmin Reporti	ng About				Dashboard Ac	cess Admin Rep				
← Settings										
SETTINGS > DOOR DEFAULTS								Diaht		Г
	General Settings				â			Click	<b>7</b>	
Door Defaults	Momentary Unlock Time:		3 +		1 A A			Circk	65	
	Momentary Unlock Time Ext:		30 +		1 hours				-	
Credential Defaults	Door Held Open:		30 + -		Users	Doors	Event Logs	Mobile Devices	Time Schedules	A
	Door Held Open Extended:		60 + -							
Audit Log Settings	First Person In:							~		
	Lock Mode:	Storeroom	Mode 🔻		8			<u> </u>	<b>A</b>	
	Lock Mode:	US/Mount	ain 🔻		System Operator					
	Advanced Settings				Roles	System Operator	Calendars	Controllers	Door Groups	Se
	Audit Overwrite Policy:		Circular	. <b>.</b>						
	Failure Condition:		Fail Safe							
	Supervision:									
	Seri	ies Resistor:	3	5 + -						
	Paral	lel Resistor:	1	5 + -						
	Toggle	Delay Time:	3	5 + -						
	Lockdown Cancel Delay Time	c .	3	5 + -						
	Interior LED Lockdown Indica	tion:								
	Time II	luminiated:		1 +						
	Time Ex	tinguished:		1 + -	· •					

The "Settings" module opens. Now return to the Home Screen \ Dashboard.

Proxess Access Co	ontrol System			≡   ♠   \$	B 🖤 🖕	□ ×
		R	emove from Dashboa	rd		
	f		pen in new window	ā,	3	
	Deere	E	Makila Davisas	Time Calculation	A P El	
Users	Doors	Event Logs	Mobile Devices	Time Schedules	Access Profiles	
	<u> </u>		Ŷ	ô.	Tor	
System Operator	Sustem Operator	Calendare	Controllers	Deer Crowns	Cattings	
Roles	System Operator	Calendars	Controllers	Door Groups	Settings	

You may "Remove" the icon from the Dashboard or open it in a new window (Is this working right?).

Ready Operator: rschor

Proxess Access Co	ontrol System			= ↑ \$	🕞   🐒   🗕 🗖	×
Dashboarc Acc	ess Admin Rep	orting				
			-	~		
			61		System Operator	
Users	Doors	Event Logs	Time Schedules	Access Profiles	Roles	
<u> </u>	<b></b>	<u>-</u>	ô <b>n</b> ā	- A		
System Operator	Calendars	Controllers	Door Groups	Settings		
Ready Operator: rschorr						0Å

Click on "Access" in the top menu.

Proxess Access Control System ashboarc Access dmin R	eporting			♠│¢ ₿ ♥ -	Proxess Access C Dashboard Acc	ontrol System	porting		
rs Door Groups	Users	Calendars	Correction of the second secon	Access Profiles	L System Operator	System Operator Roles	Contraction Contra	Settings	Controller Firmware
<u>.</u>									
rs									

Event Logs	
Event Logs	
ty   Operator: rschorr	

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

F	Proxess Access Co	ontrol System ess Admin Rep	orting		=	<b>A</b>   <b>Q</b>   <b>G</b>   <b>Q</b>	_ = ×
	Users	<b>f</b> Doors	Event Logs	<b>Time Schedules</b>	Access Profiles	System Operator Roles	
	System Operator	Calendars	<b>C</b> ontrollers	Coor Groups	Settings	C Nobile Devices	
Re	ady Operator: rschorr						

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

Â

<u>File Window Access Admin Report</u>	ting About					<u>File Window Access Admin Repo</u>	orting About			( D	SB Device
← Settings						← Settings					
SETTINGS > DOOR DEFAULTS					Save	SETTINGS > DOOR DEFAULT	S				
	General Settings			=	<b></b>		General Settings			-	
Door Defaults	Momentary Unlock Time:		3+-			Door Defaults	Momentary Unlock Time:				
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Credential Defaults	Door Held Open:		30 + <del>-</del>			Credential Defaults	Door Held Open:			-	
And the Lease Cathing and	Door Held Open Extended:		60 + -			Audit Log Sattings	Door Held Open Extended:			-	
Audit Log Settings	First Person In:					Audit Log Settings	First Person In:				
	Lock Mode: S	Storeroom M	ode 🔹				Lock Mode:	Storeroor	m Mode	- 6	
	Lock Mode: U	JS/Mountain	-				Lock Mode:	US/Mour	ntain	Name:	Robert Alan Schorr
	Advanced Settings						Advanced Settings			- Username	RobertASchorr
	Audit Overwrite Policy:	Ci	rcular				Audit Overwrite Policy:		Circular	Email:	rob.schorr@yahoo.
	Failure Condition:	Fa	il Safe				Failure Condition:		Fail Safe	Blocked:	False
	Supervision:						Supervision:			Blacklist:	False
	Series I	Resistor:		5 + -			Ser	ies Resistor:	1	Notes:	
	Parallel I	Resistor:		5 + -			Para	Ilel Resistor:	:	- Activation:	: 5/11/2017
	Toggle Dela	lay Time:		5 + -			Toggle	Delay Time:		Expiration:	: 5/11/2018
	Lockdown Cancel Delay Time:			5 + -			Lockdown Cancel Delay Time	e:		Stamped le	d: 0000000000070261
	Interior LED Lockdown Indication	n:					Interior LED Lockdown Indica	ation:			Edit Credential
	Time Illum	miniated:		1 + -			Time I	lluminiated:			Wipe and Deactivat

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.

1

# USING the ENROLLMENT READER within ProxessIQ™

## The Pop-up Window





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<sup>™</sup> application. It may then be dragged anywhere on the desktop, so that the user can continue programming other screens in the ProxessIQ<sup>™</sup> 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



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€	USB	Device			1		
This	credential	is not assi	ned to	anvone			
You	can use th	e options b	elow for	r assigi	ning		
a cre	dential.						
Sele	ct a user to	o assign thi	s creden	itial to:			
Set	orr Robe	t (RobertA	Schorr)				
Ric	hardson T	en Com d	atausa)				
Sch	orr, Rober	t (RobertA	Schorr)				
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Thu	nder, Dar	old (dthund	ler)				
Tor	re, Test ()						
Use	r1, Demo	(demouser	1)		-		
		Pop ou	ıt				



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



Using the Enrollment Reader - 3



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

Proxess Access Control System	≡  <b>≜</b>  \$  ₽ \$  - □ ×	Proxess Access Control System	≡! <b>!</b> !₽!♥!_ □ ×
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R ACCESS	Lunnand	C Access	
DOOR GROUPS		DOOR GROUPS	
+ Add New Door Group		+ Add New Door Group	This credential is not assigned to anyone
			Pop out
□ ✓		T I All DATA Office Doors	—
🔲 🖌 📋 Demo Door Group 1		Demo Door Group 1	
🗖 🖌 📋 Demo Door Group 2		🗖 🖌 🃋 Demo Door Group 2	
🗋 🖌 📋 Every Door		🗖 🖍 📋 Every Door	
🔲 🖌 📋 Woodland Park Doors		🔲 💉 📋 Woodland Park Doors	
	Name: Test Torre		
	Username:		
	Email:		
	Blocked: False		
	Blacklist: False		
	Notes:		
	Activation: 4/13/2017		
	Expiration: 4/13/2018 8:54 PM		
	Stamped Id: 0000000000070261		
	Edit Credential		
	Wipe and Deactivate		
Reload Export	Pop out	Reload Export	
Ready Operator: rischorr		Ready Operator: rschorr	

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



Using the Enrollment Reader - 5

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.

F File Window Assess Admin Bonad	ting About				File Window Access Admin Ben	orting About			(A)	SP Dovico
File Window Access Admin Repon	ting About				The Mindow Access Admin Rep	orting About				SD Device
← Settinas					← Settings					
SETTINGS > DOOR DEFAULTS					SETTINGS > DOOR DEFAULT	rs				
	General Settings					General Settings			-	
Door Defaults	Momentary Unlock Time:		3 + -		Door Defaults	Momentary Unlock Time:				
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Credential Defaults	Door Held Open:		30 + -		Credential Defaults	Door Held Open:				
	Door Held Open Extended:		60 + -		Audit Law Cattings	Door Held Open Extended:				
Audit Log Settings	First Person In:				Audit Log Settings	First Person In:				
	Lock Mode:	Storeroom N	Vode 🔹			Lock Mode:	Storeroon	n Mode	<b>1</b> . 58	
	Lock Mode:	US/Mountai	in 🔻			Lock Mode:	US/Mour	itain	Name:	Robert Alan Schorr
	Advanced Settings					Advanced Settings			- Username	: RobertASchorr
	Audit Overwrite Policy:	(	Circular	•		Audit Overwrite Policy:		Circular	Email:	rob.schorr@yahoo.c
	Failure Condition:	F	Fail Safe			Failure Condition:		Fail Safe	Blocked:	False
	Supervision:					Supervision:			Blacklist:	False
	Series	Resistor:		5 + -		Se	ries Resistor:		Notes:	
	Parallel	I Resistor:		5 + -		Para	allel Resistor:		Activation	5/11/2017
	Toggle De	elay Time:		5 + -		Toggle	Delay Time:		Expiration	5/11/2018
	Lockdown Cancel Delay Time:			5 + -		Lockdown Cancel Delay Tim	ie:		Stamped I	d: 0000000000070261
	Interior LED Lockdown Indicatio	on:				Interior LED Lockdown Indic	ation:			Edit Credential
	Time Illu	miniated:		1 + -		Time	Illuminiated:		_	Wipe and Deactivate

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.



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Window Access	Admin Reporting	Cloud About						<u>File Window Access Admin Re</u>	eporting Clo	ud Abo	out								
							*	← Access CREDENTIALS											
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_	_		~	-				Type			CREDENTIAL NAME	STAMPED ID	LAST NAM	E FIRST NAME	EXPIRATION DATE	ACTIVATION DATE	REVALIDATION DATE	CREATED DATE	MODIFIEC
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		101101		~~	System Operator				<i>,</i>	M	latt's Mobile Credential		Clemmons	Mathieu	1/28/2022 11:59:59 PM	1/28/2021 12:00:00 AM	1/28/2021 2:46:48 AM	1/28/2021 2:47:01 AM	A 1/28/2021
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								Sweet Searcher		Pe	ete's Proxess Mobile Credentia		O'Reilly		1/29/2022 11:59:59 PM	1/29/2021 12:00:00 AM	1/29/2021 2:17:04 PM	1/29/2021 2:17:21 PM	1/29/2021
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				$\smile$															
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From the Home screen \ Dashboard, click "Credentials". A User must first be created/entered from the Users menu. Once a User has been created, Credentials may be created in either the Users or Credentials menus. The Credentials menu is a simpler management tool, as all of the credentials are in a single list, whereas in the Users menu, you must first navigate into a specific User's record and then exit from that User before managing another User's credential. Your existing Credentials (even multiple credentials associated with a single User) will be listed.

Credentials may be edited, as previously instructed in the Users section. Credential records may be sorted by clicking on the headers at the top of the list (Credential Name, Stamped ID, etc...).

Credentials may be Blacklisted from this menu.

New Credentials may be added , as previously instructed in the Users section.

Advanced Searches, with multiple levels using Boolean Algebra, can be created, executed and saved for future use. Click ... File Window Access Admin Reporting Cloud About

← Access

#### CREDENTIALS

ter By	+ A	dd New Cre	dential												Search C	redentials p
		ACTIONS	CREDENTIAL NAME	STAMPED ID	LAST NAME	FIRST NAME	EMAIL	USERNAME	EXPERATION DATE	ACTIVATION DATE	REVALIDATION DATE	CREATED DATE	MODIFIED DATE	MOBILE CREDENTIAL	BLOCKLIST	ORGANIZATIONS
		1	A		124	Borden			8/8/2024 11:59:59 PM	8/8/2023 12:00:00 AM	5/4/2026 11:59:59 PM	8/8/2023 3:32:03 PM	1/30/2024 6:37:58 PM			Global
Blocklist		1	Burk Mobile		124	Borden			1/30/2025 11:59:59 PM	1/30/2024 12:00:00 AM	1/30/2024 7:32:53 PM	1/30/2024 7:33:40 PM	1/30/2024 7:33:40 PM			Global
Expired		1	в		124	Borden			2/7/2025 11:59:59 PM	2/7/2024 12:00:00 AM	2/7/2024 3:45:21 PM	2/7/2024 3:45:28 PM	2/7/2024 3:45:28 PM			Global
Revalidation		1	Pass-Through		Admin	Super	fake@		12/13/2024 11:59:59 PM	12/13/2023 12:00:00 AM	12/13/2023 10:15:07 PM	12/13/2023 10:16:07 PM	12/19/2023 3:14:41 PM			Global
Mobile Credential		1	Pass-Through Card		Admin	Super	fake@		12/13/2024 11:59:59 PM	12/13/2023 12:00:00 AM	12/13/2023 10:17:41 PM	12/13/2023 10:17:53 PM	12/13/2023 10:17:53 PM			Global
		1	Maya Mobile		Ba	Maya	baldewiczm@westerntc.edu		11/9/2024 11:59:59 PM	11/9/2023 12:00:00 AM	11/9/2023 6:02:59 PM	11/9/2023 6:03:08 PM	12/1/2023 10:38:10 PM			Global
and Searchae		1	Maya Lockdown		Ba	Maya	baldewiczm@westerntc.edu		11/9/2024 11:59:59 PM	11/9/2023 12:00:00 AM	11/9/2023 6:03:39 PM	11/9/2023 6:03:46 PM	12/1/2023 10:38:12 PM			Global
		1	CB Card	000000000014237	Bartee	Carl	cbartee@fbcglenarden.org		4/17/2025 11:59:59 PM	4/17/2024 12:00:00 AM	1/12/2027 11:59:59 PM	4/17/2024 2:30:50 PM	4/25/2024 1:41:17 PM			Global
		1	CB Mobile		Bartee	Carl	cbartee@fbcglenarden.org		4/17/2025 11:59:59 PM	4/17/2024 12:00:00 AM	4/17/2024 2:57:17 PM	4/17/2024 2:57:41 PM	4/17/2024 2:57:41 PM			Global
		1	CB LK		Bartee	Carl	cbartee@fbcglenarden.org		4/17/2025 11:59:59 PM	4/17/2024 12:00:00 AM	4/17/2024 2:59:05 PM	4/17/2024 2:59:17 PM	4/17/2024 2:59:17 PM	<b></b>		Global
		1	Scott's Mobile		Cobb	Scott	scobb@eyeonis.com		9/15/2024 11:59:59 PM	9/15/2023 12:00:00 AM	9/15/2023 3:14:50 PM	9/15/2023 3:15:00 PM	10/24/2023 4:02:13 PM			Global
		1	Credential		CoreMK	SwitchTech			10/24/2024 11:59:59 PM	10/24/2023 12:00:00 AM	10/24/2023 2:45:04 PM	10/24/2023 2:45:07 PM	10/24/2023 4:02:19 PM			Global
		1	Credential		Darion	Nelly	dstone@kb.com	Science Department	2/5/2025 11:59:59 PM	2/5/2024 12:00:00 AM	2/5/2024 7:20:19 PM	2/5/2024 7:20:40 PM	2/5/2024 7:43:03 PM			Global
		1	Darion Mobile		Darion	Nelly	dstone@kb.com	Science Department	2/5/2025 11:59:59 PM	2/5/2024 12:00:00 AM	2/5/2024 7:30:32 PM	2/5/2024 7:30:45 PM	2/7/2024 4:30:56 PM			Global
		1	Dexter's Mobile		Earney	Dexter	earneyde@gvsu.edu		12/8/2024 11:59:59 PM	12/8/2023 12:00:00 AM	12/8/2023 3:30:24 PM	12/8/2023 3:30:38 PM	12/19/2023 3:14:44 PM			Global
		1	Maddir G Mobile		Gia	MAd	mgiardina@arcsgalloway.org		2/7/2025 11:59:59 PM	2/7/2024 12:00:00 AM	2/7/2024 2:09:44 PM	2/7/2024 2:10:02 PM	3/8/2024 9:09:37 PM			Global
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		5 LAST NAME 124 Admin Ba Bartee Cobb	FIRST NAME Borden Super Maya Carl Scott	MIDDLE NAME	EMAIL fake@ baldewiczm@westerntc.edu cbartee@fbcglenarden.org scobb@eyeonis.com	USERNAME	ORGANIZATIONS Global Global Global Global Global
		5 LAST NAME 124 Admin Ba Bartee Cobb CoreMK	FIRST NAME Borden Super Maya Carl Scott SwitchTech	MIDDLE NAME	EMAIL fake@ baldewiczm@westerntc.edu cbartee@fbcglenarden.org scobb@eyeonis.com	USERNAME	ORGANIZATIONS Global Global Global Global Global Global
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		5 LAST NAME 124 Admin Ba Bartee Cobb CoreMK CoreMK Darion Earney Gia	FIRST NAME Borden Super Maya Carl Scott Scott SwitchTech KB NE Dexter MAd	MIDDLE NAME	EMAIL EMAIL Eake® Eaklewiczm@westerntc.edu chartes@ftk.glenarden.org scobb@ryconis.com dstone@kelleytros.com earnoyk@grou.edu majardina@scajaloway.org	USERNAME	ORGANIZATIONS Global Global Global Global Global Global Global Global
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# Must cancel "X" an Advanced Search, or the User menu will continue to only show those results.

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#### **Advanced Searches of Users**

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Filter by	Advanced Search			×
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Ready Operator: Administrator				

Credentials - 3

#### Within each User record

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				Delete Selected Reload Export Import	
Ready Operator: Administrator		1.1	Ready   Operator: Administrator		

Name this search for your future use and click "OK".

Your new custom search will now appear in this list, for later execution by this and other operators. When you have completed your Search, you must click "X" to bring you back to the full list of Users, or the User menu will continue to only show those Search results.

#### **Advanced Searches of Users**

← Access	eporung	Clo	ua A	bout					
USERS									
Filter by	+ A	+ Add New User						Search Users	م
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You are now returned to the full list of Users. You may execute on that saved search again any time, by clicking on the arrow next to its name. Eile Window Access Admin Reporting Cloud About USERS Advanced Search Filter by 莭 Last Name Department Search 📅 - Contains ) **t** AND (Exclusive) OR (Inclusive) Save Search ACTIONS | LAST NAME | FIRST NAME | MIDDLE N EMAIL USERN 口 / 亩 dstone@k Reload Export Import

> You may Export the search results to a .csv for further manipulation and click the "X" and return to your normal system work.


Ele Yendow Access Admin Reporting Cloud About Dashboard Access Admin Reporting Cloud	ProxessQ <sup>™</sup> ≡   ♠   ✿ File Window Access Admin Reporting Cloud About ← Cloud Services
Image: DoorsImage: Doors </th <th>NOTIFICATIONS</th>	NOTIFICATIONS
From the Home screen \ Dashboard, click "Notifications".	Your existing Notifications will be listed. Click "Add New Notification" to do so. You may click on the column titles (Name, Trigger Source and Trigger Name) to sort by the alphabetical order. You may edit or delete any existing Notification by clicking on its Pencil/Edit icon on the left s
Process(Q <sup>™</sup> ) Ile Vindow Access Admin Reporting Cloud About ← Notifications       General     Name:       Tigger Type:     Event       Tigger Screect     Low battery       Tigger Screect     Low battery       Tingger Screect     0 + minutes	Event Event Scheduled Low battery Global lockdown Door accessed Access denied Lock tampered Note: "Low Battery" & "Expiring Credentials" are good preventative
Enter the name for the new Notification. The "Trigger Type" for initials either an instantaneous Event, or one that is Scheduled. The "Trigger Schedule" is provided to allow different emails at different times and days. "Time to Live" is the number of m	Always people to receive people to receive boor lockdown people to receive people to

and will persist until it is attended to. Only one email will be sent per event.

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							Save	
General								
	Name:							
	Trigger Type: Event	•						
	Trigger Source: Low battery	•	Less than: $1 + - \%$					
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File Window Access Admin Reporting	Cloud About			
← Notifications				Save
General				
	Name:	Preventative Battery Maintenance		
	Trigger Type:	Scheduled		
	Trigger Source:	Low battery Less than: %		
	Delivery Schedule:	Every 1 WEEK at 00:00:00 starting 2/9/2021 (Tuesday		
	Time to Live:	0 + - minutes		

Note: In the following example we will create a Scheduled Notification. For Notifications with the "Trigger Type" selected as an "Event", individual Users/Recipients may be added to be emailed either always, or just for specific days of the week and times of the day. As an example, we will name a new Notification, "Preventative Battery Maintenance". We will select it to be a scheduled event, notifying on any-and-all locksets that have a "Low Battery" level of 30% (This should give you 1 to several months, depending on usage, advance notice before the low-battery LED begins blinking on the locksets). The default time for a scheduled notification is once per week. Click the edit button to change this.

Trigger Source:	tion battery	<ul> <li>Less that: 30 -+</li> </ul>	— x
Every	4 + - Week(s) at Ok	08:00:00 AM [11] startin (2/9/2021	)

Notifications - 2

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<u>File</u> <u>Window</u> Access <u>A</u> dmin Reporti	ng Cloud About		$\sim$
$\leftarrow$ Notifications			Save
General			
	Name:	Preventative Battery Maintenance	
	Trigger Type:	Scheduled	
	Trigger Source:	Low battery	
	Delivery Schedule:	Every 4 WEEK at 08:00:00 starting 2/9/2021 (Tuesday)	
	Time to Live:		
Ready Operator: Administrator	L		

Let's have this email sent out every 4 weeks (click the + & - to change), at 8AM (click there to change), beginning on the date of your choice (click there to change). Click "OK".

Click on "Save".

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He window Acces gamin Reporting Cloud Acour	Sue	File <u>Mindow Access Admin</u> Reporting Cloud About	
< Notifications			-
		General Name Preventative Battern Maintenance	
		Trigger Type: Scheduled	
Trigger Source: Low battery Less than:	30 + - ×	Ingger Source Low battery   Less than 30 + = %	
Notification Saved		Delivery Schedule: Every 4 WEEK at 06:00:00 starting 2/9/2021 (Tuesday)	
The Houndarion Changes have been saved			
		Recip of Add New Recipient	
		ACTIONS NAME DELIVERY METHOD	
		Ready   Operator: Administrator	4
This shows the new Notification has been sa	ived. Click "OK".	/ To select someone to receive an email for this Notification	
		(either on a schedule or as it is received in the software), Click	
	/	"Add a New Recipient".	
	/		
	/		
	/		
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P <sup>®</sup> Proxess/Q <sup>™</sup> Eile Window Access Admin Reporting Cloud About		P <sup>™</sup> ProzessiQ <sup>™</sup>	×
	Save	← Notifications	
Conoral		Coneral	
		Name: Preventative Battery Maintenance	
Trigger Type: Scheduled		Trigger Type Scheduled •	
Select Recipient for Notification		ingger Source: Low battley	
Select User. Facilities Manager () 💌		Time to Live: 0 + - minutes	
Select Delivery Method User Email 💌			
		Recipients + Add New Recipient	
		Invester (New Province)     Invester (New Province)	

Select the recipient's name from the drop-down list of Users and then "User Email" from the next drop-down list. Additional options may become available for selection in this list. Click OK".

Notifications - 3

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General									Annual
	Name:								
	Trigger Type:	Event							and the second se
	Trigger Source:	Low battery	Less than: 1 + -	- %					
	Trigger Schedule:	Always							
	Time to Live:		0 + - minutes						
									and the second

p ProxessiQ™ File Window Access Admin Reporting ← Notifications	Cloud About			
General	Name:	Local Lockdown		
	Trigger Type:	Event		
	Trigger Source:	Door lockdown		
	Trigger Schedule:	Early Bird	·	
	Time to Live:	3 +	minutes	

Note: In the following example we will create an Event based Notification. The primary difference from a Scheduled Notification is this: With an Event based Notification, individual Users/Recipients may be added to be emailed either always, or just for specific days of the week and times of the day. From the main Notifications page, Click on "Add New Notification" and this page will open.

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Eile Window Access Admin Reporting C	loud About		
← Notifications			Save
Company 1			
General			
	Name: Local Lockdown		
	Trigger Type: Event	•	
	Trigger Source: Door lockdown		
	Trigger Schedule: Early Bird		
	Time to Live: 3 +	- minutes	
Ready Operator: Administrator			



As an example, we will name a new Notification, "Local Lockdown". This will provide an email from an individual Lockset being put into the Lockdown mode. We will select it to be an "Event" based Trigger Type, with a Trigger Source as a "Door Lockdown", with the email being sent to the Users we will next select, during the "Early Bird" Trigger/Time Schedule. Click "Save".

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Eile <u>W</u> indow Access <u>A</u> dmin Rep		
← Notifications		
	Select Recipient for Notification Select User Facilities Manager () • Select Delivery Method User Email • Ck Cancel	

Select the recipient's name from the drop-down list of Users and then "User Email" from the next drop-down list. Additional options may become available for selection in this list. Click OK".

Eile Window Access ∆dmin R	porting Cloud About		
← Notifications			Save
General			
	Name: Local Lockdown		
	Trigger Type: Event		
	Trigger Source: Door lockdown		
	Trigger Schedule: Early Bird		
	Time to Live: 3 +	- minutes	
	Recipients + Add New Recipient		
	ACTIONS NAME DELIVERY METHOD		
	💉 🏛 Facilities Manager () User Email		

Notifications - 5

The recipient now appears in the list for this Notification. You may return to the Notifications menu by clicking "
 Notifications".





## LOGS

All User & Door event logs are available here and may be searched using multiple custom Boolean rules.

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Users	Doors	Door Groups	Calendars	Credentials	Time Schedules	Access Profile
Controllers	System Operator	System Operator Roles	ج Mobile Devices	Settings	Logs	Mobile Credentials
8	E:	-			$\smile$	
Notifications	<b>C</b> rganizations	Cloud Settings				

Click on the "Logs" menu.

The combination of all User & Door Logs/events are available here and may be searched using multiple custom Boolean rules.

As a reminder, a single User's or Door's events/Logs may also be found under their individual records.

tor by									Search	
ler by		EVENT CODE	SOURCE ITEM NAME	SOURCE USER/OPERATOR	EVENT DATE TIME(LOCAL)	CREATED (LOCAL)	EVENT DATE TIME(UTC)	CREATED (UTC)	ORGANIZATIONS	VID
aved Searches ✓ Adhoc → 前 General → 前	× /	CREDENTIAL_UPDATE	TS Card		4/17/2024 12:37:56 PM	4/17/2024 12:37:56 PM	4/17/2024 4:37:56 PM	4/17/2024 4:37:56 PM	Global	
	1	CREDENTIAL_UPDATE	TS Card		4/17/2024 12:37:32 PM	4/17/2024 12:37:32 PM	4/17/2024 4:37:32 PM	4/17/2024 4:37:32 PM	Global	
	1	LOCK_PARAMETERS_PROGRAMMABLE_VIA_BLE	Assumption Classroom 1		4/17/2024 12:36:35 PM	4/17/2024 12:36:46 PM	4/17/2024 4:36:35 PM	4/17/2024 4:36:46 PM	Global	ſ
y Use 🔿 💼	1	OPERATORMPD_CREATE	Tariq phone	Administrator	4/17/2024 12:35:28 PM	4/17/2024 12:35:28 PM	4/17/2024 4:35:28 PM	4/17/2024 4:35:28 PM	Global	
	1	LOCK_PARAMETERS_PROGRAMMABLE_VIA_BLE	Assumption Classroom 1		4/17/2024 11:52:43 AM	4/17/2024 11:52:54 AM	4/17/2024 3:52:43 PM	4/17/2024 3:52:54 PM	Global	Ĩ
	1	MECHANICAL_KEY_ACCESS	Assumption Classroom 1		4/17/2024 11:52:35 AM	4/17/2024 11:52:54 AM	4/17/2024 3:52:35 PM	4/17/2024 3:52:54 PM	Global	- ii
	1	MECHANICAL_KEY_ACCESS	Assumption Classroom 1		4/17/2024 11:52:32 AM	4/17/2024 11:52:54 AM	4/17/2024 3:52:32 PM	4/17/2024 3:52:54 PM	Global	
	1	LOCK_PARAMETERS_PROGRAMMABLE_VIA_BLE	Assumption Classroom 1		4/17/2024 11:52:19 AM	4/17/2024 11:52:34 AM	4/17/2024 3:52:19 PM	4/17/2024 3:52:34 PM	Global	
	1	USER_UPDATE	Bartee, Carl	Administrator	4/17/2024 11:41:01 AM	4/17/2024 11:41:01 AM	4/17/2024 3:41:01 PM	4/17/2024 3:41:01 PM	Global	
	1	ACCESS	Assumption Classroom 1	Scott, Taariq	4/17/2024 11:40:12 AM	4/17/2024 11:52:34 AM	4/17/2024 3:40:12 PM	4/17/2024 3:52:34 PM	Global	1
	1	CREDENTIAL_UPDATE	TS Card	Administrator	4/17/2024 11:09:43 AM	4/17/2024 11:09:43 AM	4/17/2024 3:09:43 PM	4/17/2024 3:09:43 PM	Global	
	1	CREDENTIAL_UPDATE	TS Card	Administrator	4/17/2024 11:09:42 AM	4/17/2024 11:09:42 AM	4/17/2024 3:09:42 PM	4/17/2024 3:09:42 PM	Global	
	1	CREDENTIAL_UPDATE	Credential	Administrator	4/17/2024 11:09:07 AM	4/17/2024 11:09:07 AM	4/17/2024 3:09:07 PM	4/17/2024 3:09:07 PM	Global	
	1	ACCESS	Assumption Classroom 1	Scott, Taariq	4/17/2024 11:08:42 AM	4/17/2024 11:52:34 AM	4/17/2024 3:08:42 PM	4/17/2024 3:52:34 PM	Global	ſ
	/	CREDENTIAL UPDATE	TS Card	Administrator	4/17/2024 11:08:28 AM	4/17/2024 11:08:28 AM	4/17/2024 3:08:28 PM	4/17/2024 3:08:28 PM	Global	

leady Operator: Administrator

Logs - 1

This is the initial screen. On the left is the list of saved custom searches you or other Operators may have created. You can simply click the name of the one you want to execute or the trash icon of the one you may want to delete.

## SEARCH SOURCES

Event Date Time Source Item Name Source Details Event Code Event Code Type Event Source Type

Logs - 2

## **EVENT CODE TYPE**

Valid Access Invalid Access Contact Point (Physical Input) Lock Event Event Group Door Alerts Communications Item Created Failed Item Removed Item Removed Item Relationship Added Item Relationship Removed Item Updated Accessed

## **EVENT SOURCE TYPE**

LockAudit Door Door Group User Credential Operator Controller OperatorMPD AccessProfile Calendar TimeSchedule AuditLog OperatorRole Other

#### **EVENT CODE NAME**

Access Entry Exit Access Under Duress **Entry Under Duress Exit Under Duress** Access Under Lockdown Entry Under Lockdown Exit Under Lockdown **Double Swipe Reader Toggle Unlock Double Swipe Reader Toggle Cancel** Mechanical Key Access Lockdown Initiated Lockdown Cancelled Card Format Not Supported Invalid System ID Antipassback Violation **Credential Not Yet Activated Credential Has Expired Revalidation Period Has Expired** No Access Granted To This Door Access Not Permitted At Time Of Presentation **Repeated Invalid Attempts Rex Active Rex Secure Rex Fault Short Rex Fault Open Tamper Active Tamper Secure** Power On Reset Factory Default Reset Lock Parameters Programmable VIA BLE Lock Database Programmable Via BLE Low Battery Warning **Critical Battery Warning Battery Failure As Is Time Changed Batteries Replaced** Alert Door Held Open Alert Door Held Open Cancel

Alert Door Forced Open Alert Door Forced Open Cancel **Communication Lost to Proxess Host** Communications Restored to Proxess Host Communications Lost to Reader Communications Restored to Reader Door Create **Door Create Fail** Door Update Door Update Fail Door Remove Door Remove Fail Door Delete Door Group Create Door Group Create Fail Door Group Update Door Group Update Fail **Door Group Remove** Door Group Remove Fail **Door Group Delete** Door Group Delete Fail Door Group Assignment Add Door Group Assignment Remove User Create User Create Fail Upser Update User Update Fail User Remove User Remove Fail **Credential Create Credential Update** Credential Remove **Credential Create Fail** Credential Update Fail **Credential Remove Fail Operator Create Operator Update Operator Remove Operator Create Fail Operator Update Fail Operator Remove Fail** 

Controller Create **Controller Update Controller Remove Controller Create Fail** Controller Update Fail **Controller Remove Fail** Controller Password Accessed Controller Connecting **OperatorMPD** Create OperatorMPD Update **OperatorMPD** Remove **OperatorMPD** Create Fail **OperatorMPD Update Fail OperatorMPD Remove Fail** AccessProfile Create AccessProfile Update AccessProfile Remove AccessProfile Create Fail AccessProfile Update Fail AccessProfile Remove Fail Calendar Create Calendar Update Calendar Remove Calendar Create Fail Calendar Update Fail Calendar Remove Fail TimeSchedule Create TimeSchedule Update TimeSchedule Remove TimeSchedule Create Fail TimeSchedule Update Fail TimeSchedule Remove Fail AuditLog Clear All AuditLog Row Removal **OperatorRole Create** OperatorRole Update **OperatorRole Remove OperatorRole Create Fail** OperatorRole Update Fail **OperatorRole Remove Fail** Unknown Event





These tabs show the default settings used throughout the ProxessIQ<sup>™</sup> 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).



# Settings - 1

# From the Basic...



# To the Complete...

