



SOFTWARE MANUAL

ProxessIQ™ Software & Proxess Sync™ 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™ server and client), Windows 10+, Intel Core i5 2GHz, 1 USB input, 8MB RAM, 256GB free disk space
- ProxessIQ™ software Download link: www.proxess.com/downloads
- USB Enrollment Reader
- Apple or Android Smart Phone
- Proxess Sync™ Download link
- Network or Internet connection for the PC, depending on the Proxess Sync™ connection method
- Common WiFi connection to ProxessIQ™, or mobile plan with connection to the ProxessIQ™ 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: <https://pmcs.proxess.com>
- "Dumb" remote synchronization app, which can be enabled & disabled with a click in the software anytime that it is to be used: <https://proxy1.proxess.com>
- 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)



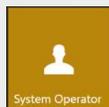
- **Software Installation:** Instructions for downloading and installing the ProxessIQ™ software; both server & clients.



- **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.



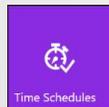
- **System Operators:** Add operators into an Operator Role. Modify\personalize their role.



- **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.



- **Time Schedules:** Create the days and times that locks and doors will operate with credentials and remain locked or unlocked.



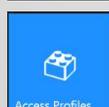
- **Door Groups:** Create groups of Doors, for more easily assigning access rights to users.



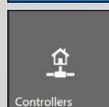
- **Doors:** *Adding, programming & editing* wireless locks and online doors.



- **Doors:** *Controlling* Online & Bridged doors.



- **Access Profiles:** Create groupings combining Time Schedules with Doors and Door Groups.



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

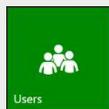
Quick Start Guide (Page 2 of 2)



- **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).



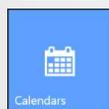
- **Users:** Mass-Adding\Modifying\Deleting Users & Credential using a .csv spreadsheet



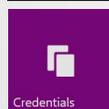
- **Encoding & Deleting:** Using the **ProxessIQ Software** to Encode & Delete credentials



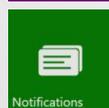
- **Encoding & Deleting:** Using the **Proxess Sync** phone app to Encode & Delete credentials



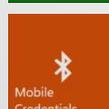
- **Calendars:** Schedule Holidays and special events, years in advance.



- **Credentials:** Simpler management utility for credentials, after a User is created in Users menu, including custom Advanced Searches



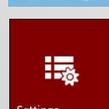
- **Notifications:** Set Email alerts based on virtually any system event.



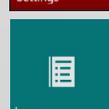
- **Mobile Credentials:** Administrative management of Mobile Credentials (Issuance typically occurs in the Users menu).



- **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 (laptop or desktop) used for OR configuration and data entry.

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

PC SPEC (minimum):

Intel Core i5, 2GHz
8MB Cache
8GB RAM
256GB Hard Drive

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



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





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

For 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.



www.Proxess.com/Downloads

Note on Upgrading Versions:
When upgrading the version of your ProxessIQ™ software, be certain to upgrade the server as well as all the clients to the same version, or there could be functions that do not operate properly.

Note: 1.4 versions are for support of Legacy systems Only

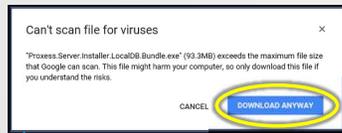
Alternatively, for systems where the server computer will Not be used as an administrative terminal, click on the 1.5.x **Server** file (instead of the Bundle). All the subsequent administrative workstations will have the Client file installed, as discussed above.



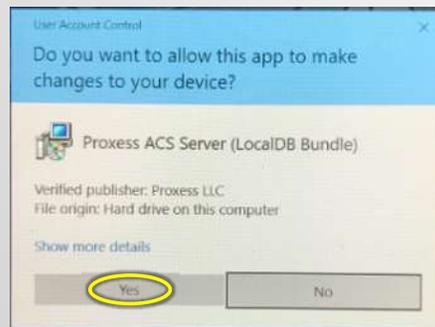
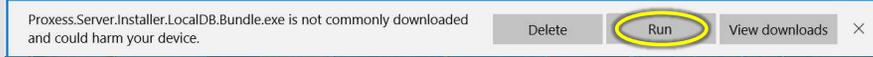
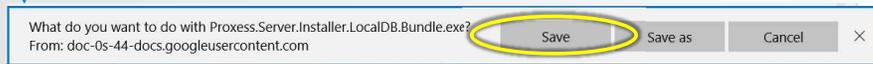
Per the previous page, click on “**Proxess-Server-Installer-LocalDB-Bundle.exe**” to begin the file download.

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™ Control Center will launch.

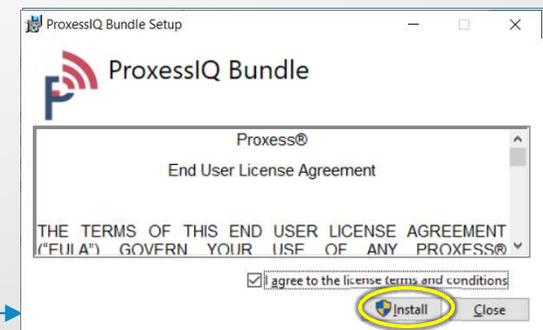
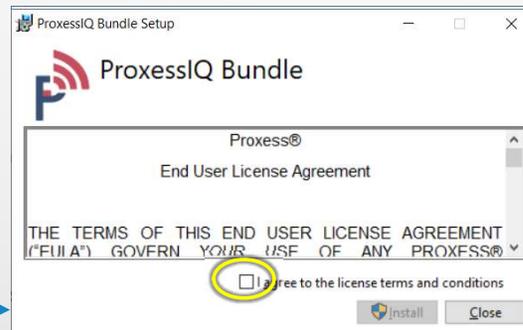
This is the **Download Bundle** installation wizard:



Follow the windows that open and prompts that appear on this page. Depending on your computer's settings, some of these windows may not appear and can be ignored.

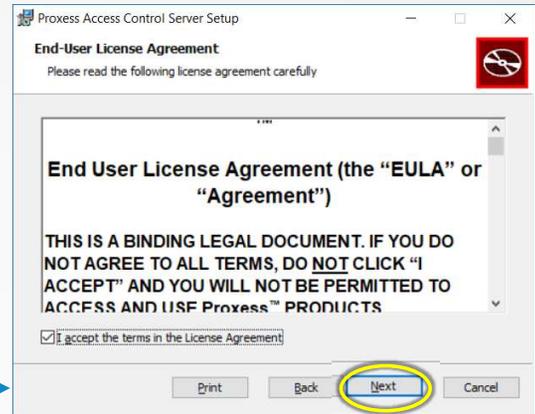
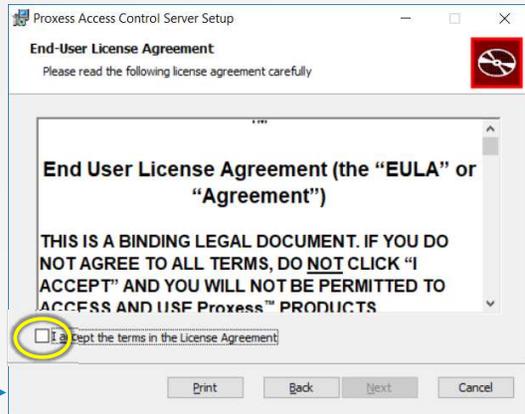
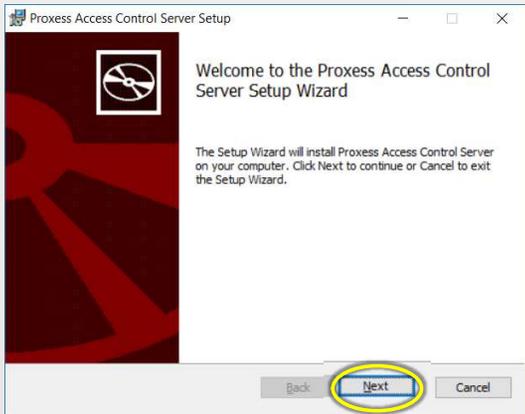


The icon below may blink in your computer's taskbar. If so, click on it to proceed.

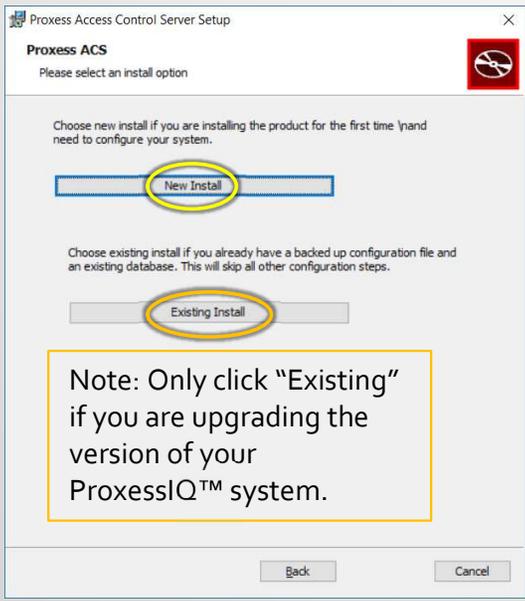




This is the **Server Installation** installation wizard:



Continue following the windows that open and the prompts that appear on this page.



Click "New Install". Only click "Existing Install" if you are upgrading the current version of your system.

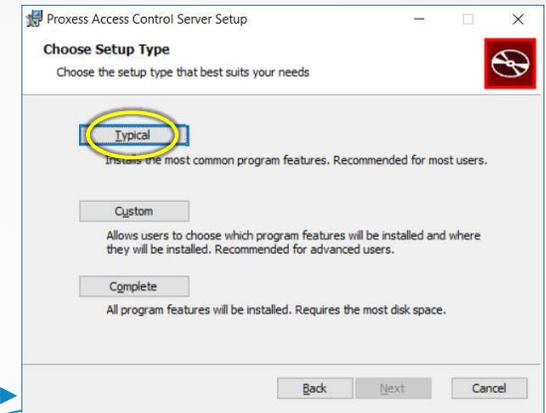
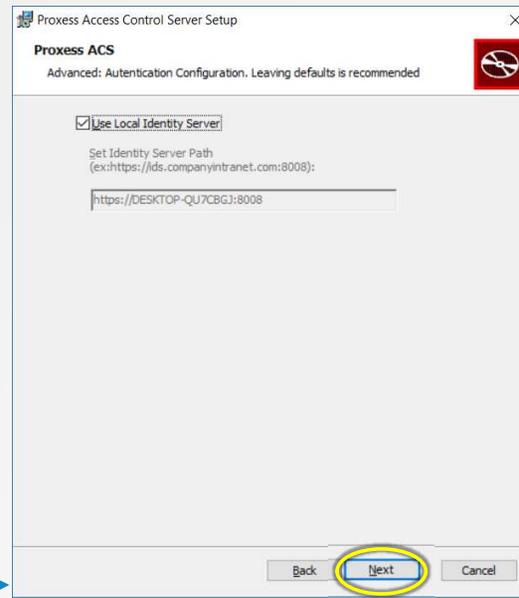
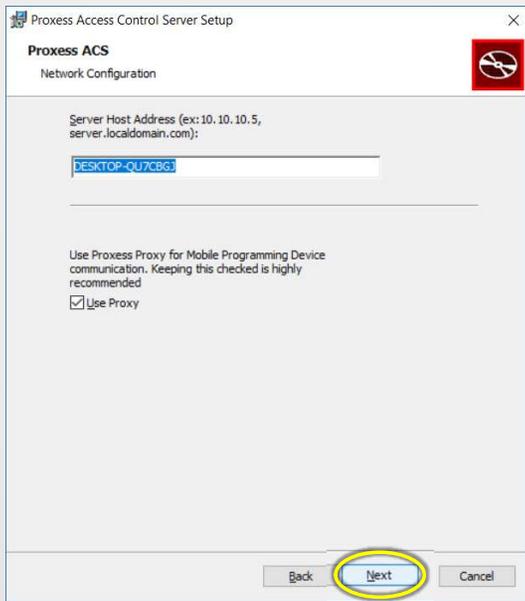


Check the box to Use LocalDB and do not change the path that appears. Only set a different path if you have already installed SQL Express and will take responsibility for its maintenance.



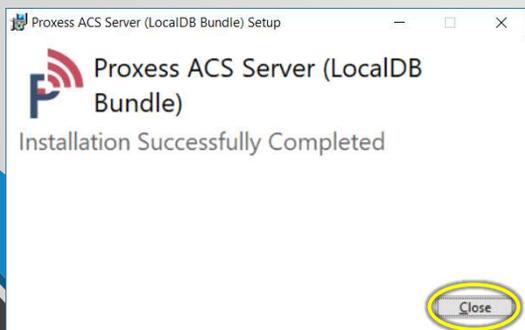
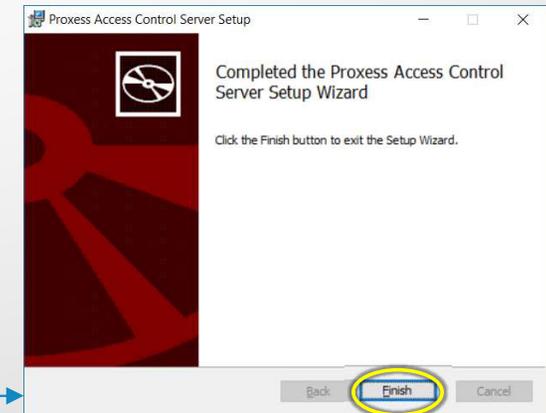
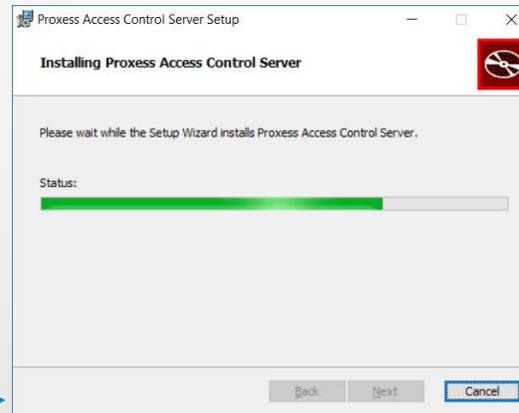
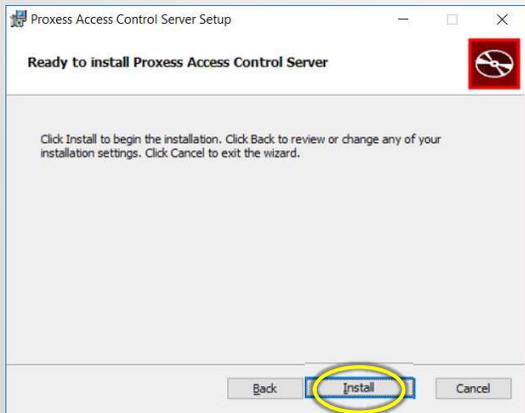


ProxessIQ™ Software Download & Installation 5



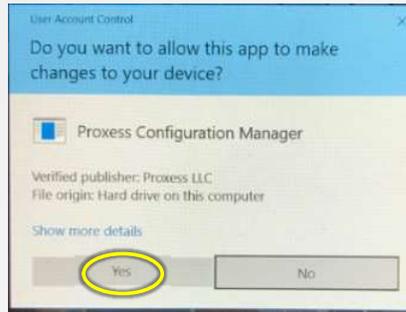
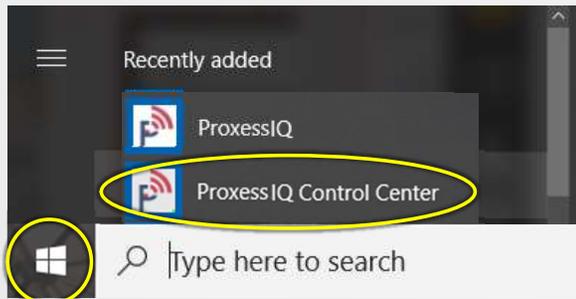
Do not change the default server address or name, unless you are prepared take responsibility for the resulting network connectivity. Leave "Use Proxy" checked.

Select "Typical", unless otherwise discussed with Proxess.





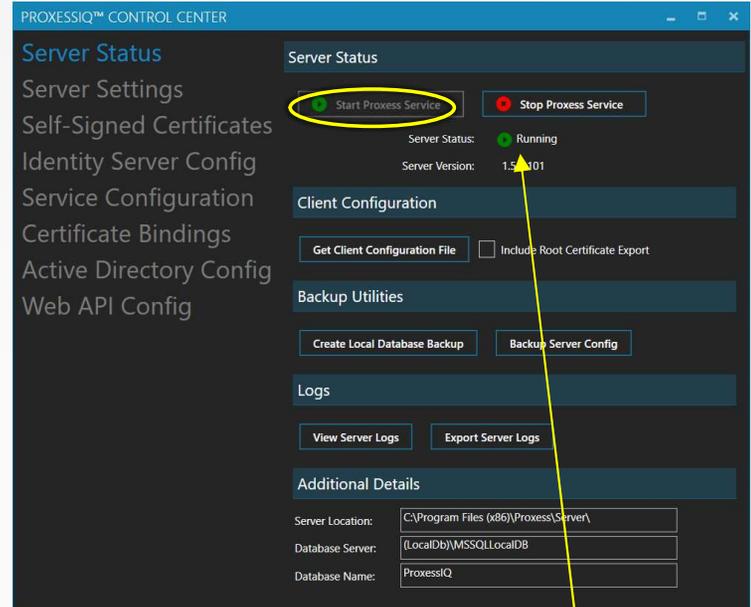
Initializing the Server



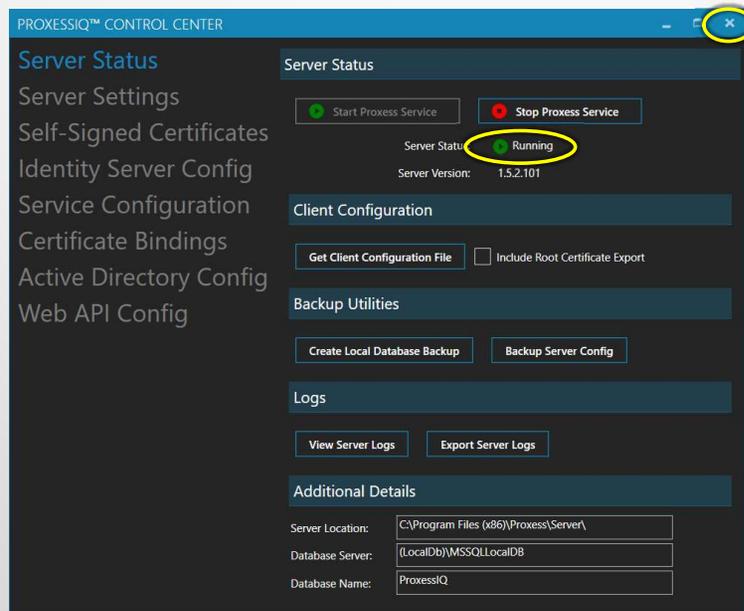
Both the "Server" and "Client" portions of the software have now been installed on your computer.

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

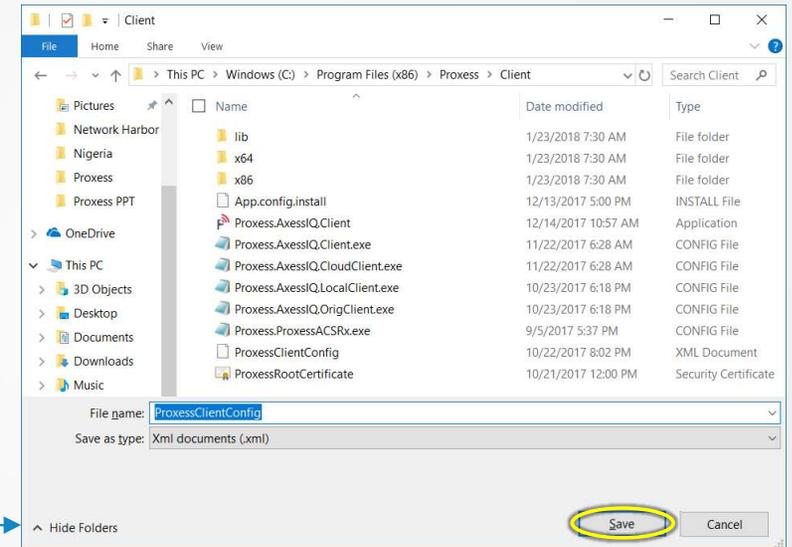
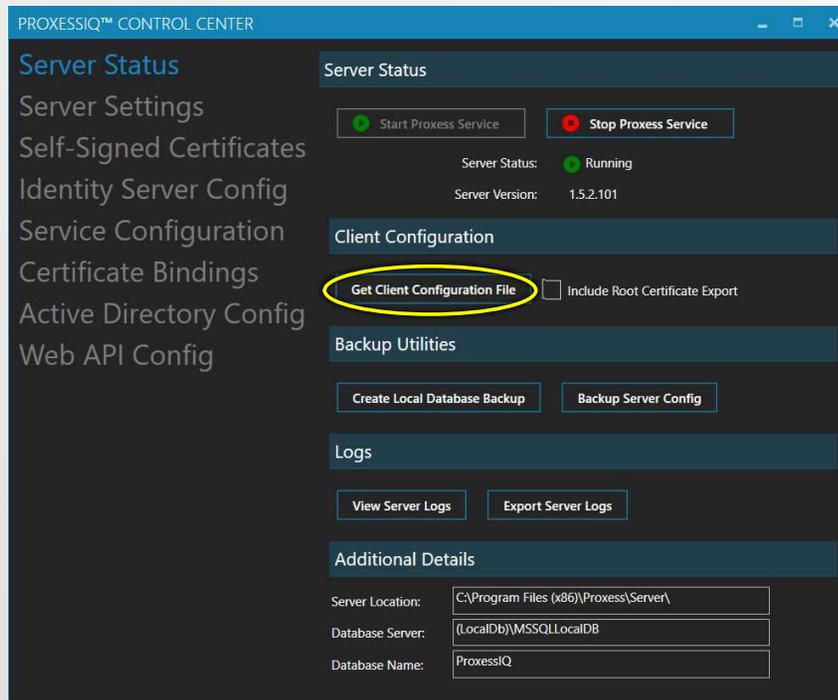
Press the Windows™ icon on the keyboard or click on the Windows™ icon on the left side of the Taskbar on the bottom of your screen. Locate and click on the "ProxessIQ™ Control Center", which will be in both the "Recently Added" section of the pop-up list of programs, as well as under the "P" section down below. If prompted with the window requesting to make changes to your computer, click "Yes".



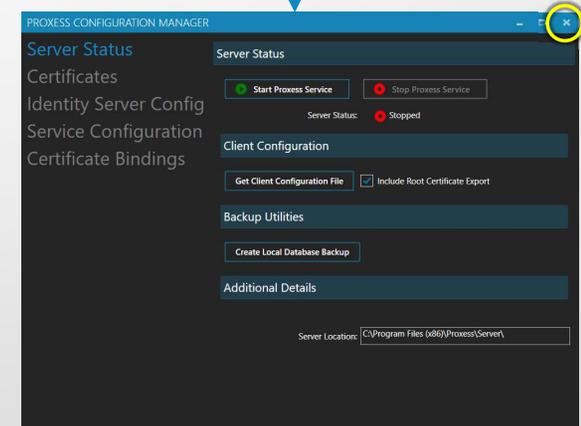
The above screen will open. If the Server Status is shown as "Stopped" then click on "Start Proxess Services".



Usually within several seconds (and upwards of about a minute) after clicking "Start Proxess Services" the Server Status will change to "Running". We will now proceed to initiate the software.



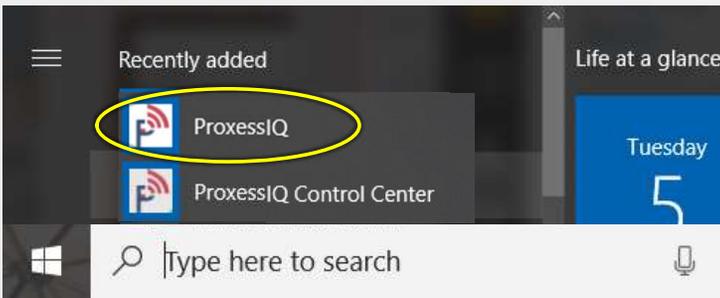
Click the "Get Client Configuration File" button.
On the "Save As" screen, navigate to the following (preferable) folder location to save the file in:
"This PC \ Windows (C) \ Program Files (x86) \ Proxess \ Client".
Click the "Save" button.
Click on the "x" on the top right of the ProxessIQ™ Control Center window to close the application.



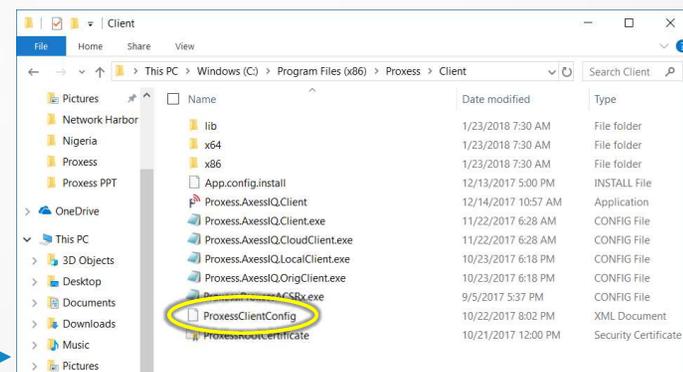
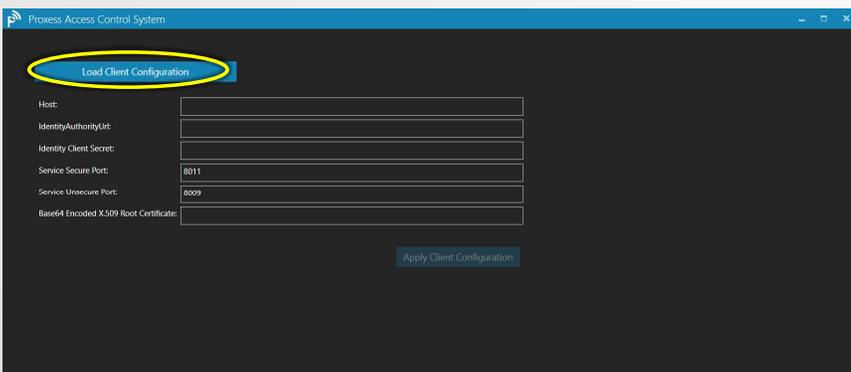
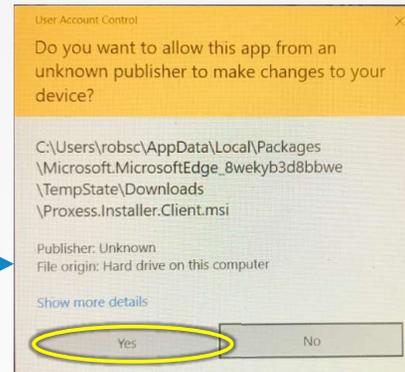
Note: It is important to keep the Proxess Services Running at all times and especially to enable it to automatically start-up upon a restart of the computer.



Initializing the Client

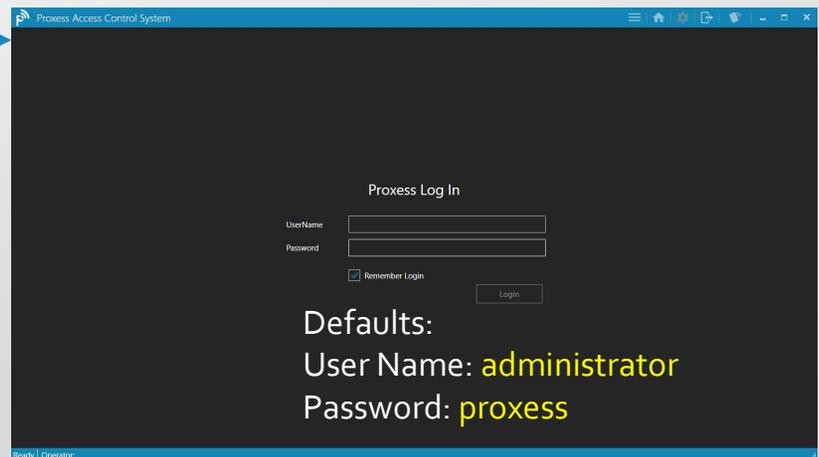
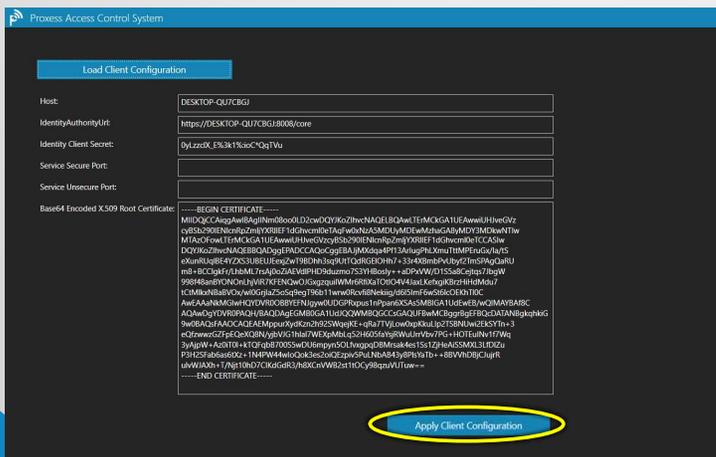


Click the "Windows" icon on your computer and select the "ProxessIQ" program and allow the app to make changes to your device.



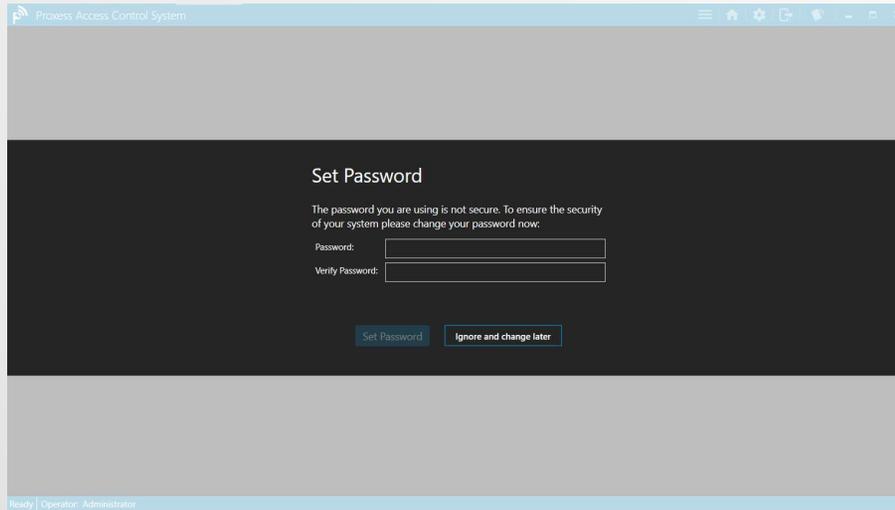
NOTE: Other than as stated here, do not make any changes to these screens. Click the "Load Client Configuration" button on the first screen. If you have not yet pasted it into the Client folder, you will be asked to search for the Configuration file, which may be found in the file folder you saved it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

On the next screen (below), click the "Apply Client Configuration" button. The Login screen will open. Enter "administrator" and "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™ software will now open.



After installing the ProxessIQ™ 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.



Software Licenses for: ProxessIQ™ & Mobile Credentials/Keys



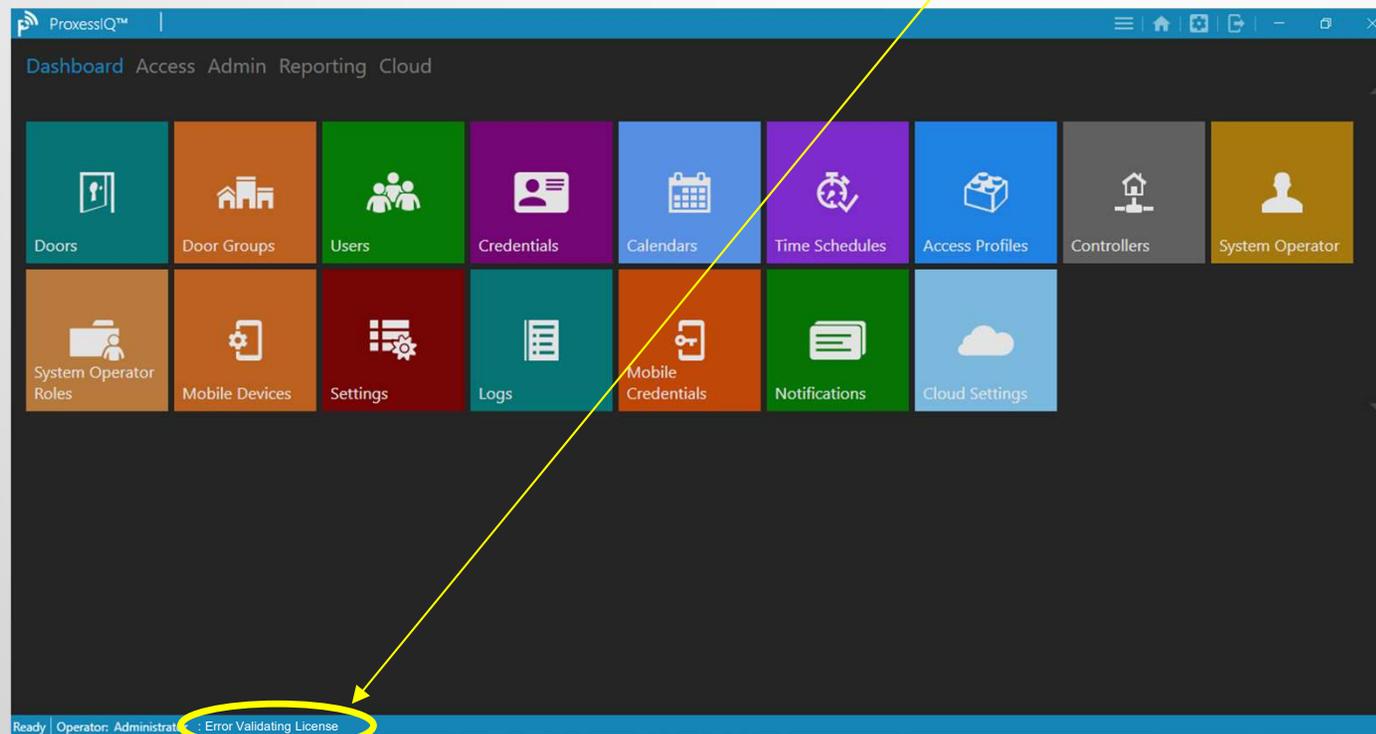
When prompted to provide a license file in a ProxessIQ™ system and in order to add mobile credentials/keys to your system, a Proxess employee or authorized dealer will email a license package, as a .zip file.



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.

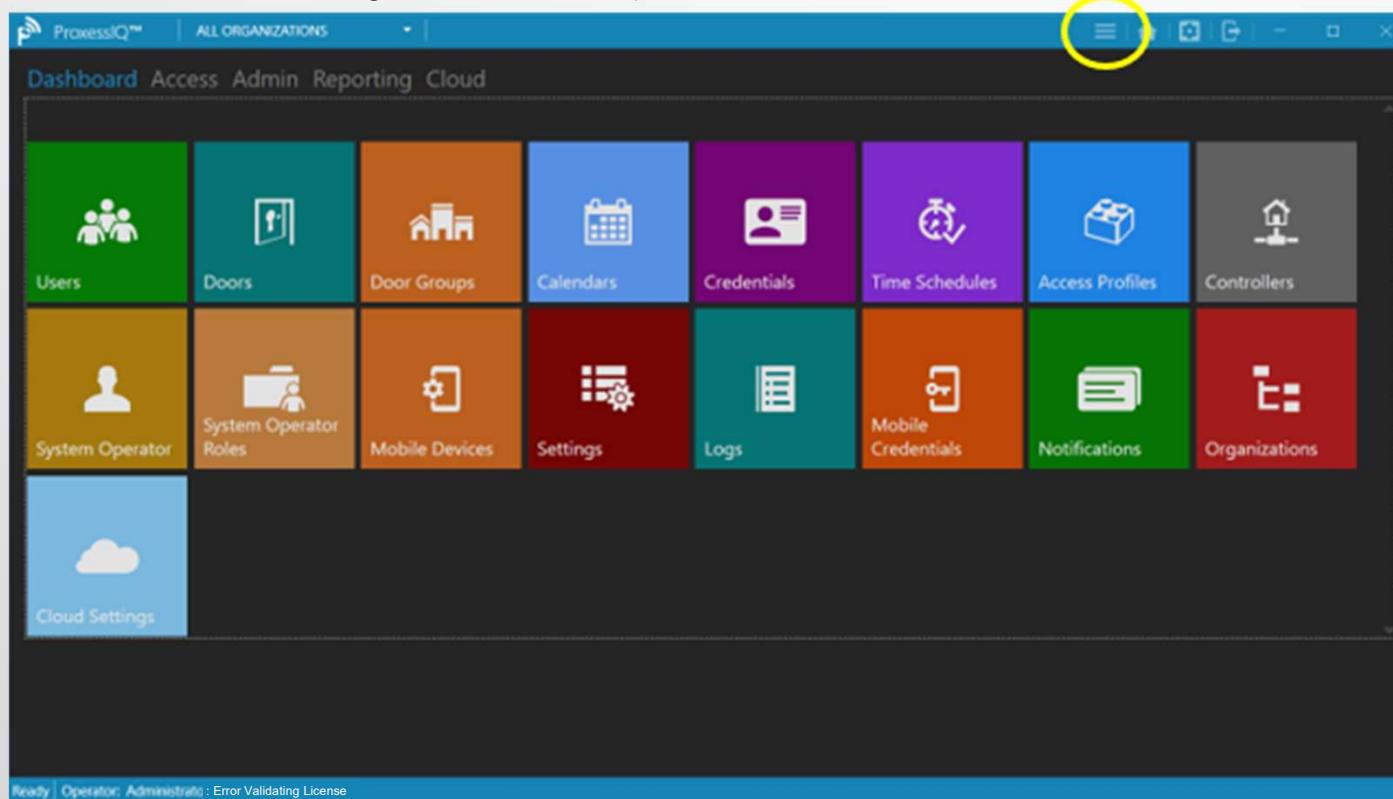
This file may be added when prompted upon your login to the software, via this notification on the bottom bar of the software:





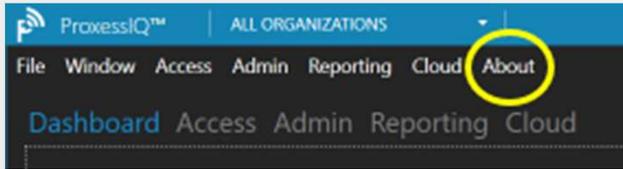
Install the license file using the following instructions.

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

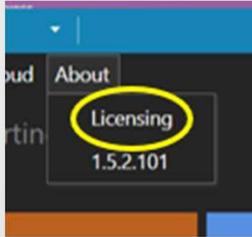




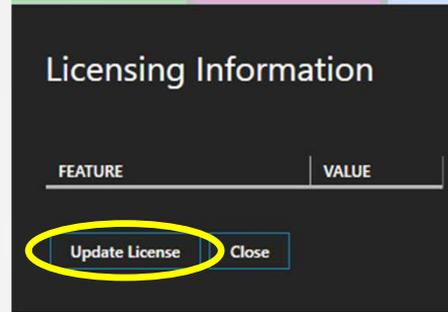
In the white menu items that appear, Click on "About".



Click "Licensing"

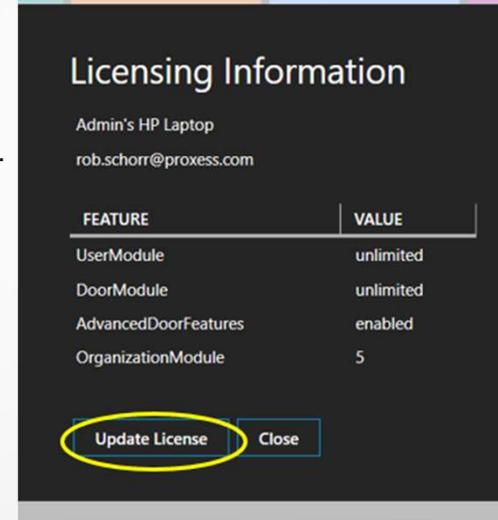


(In a New System)



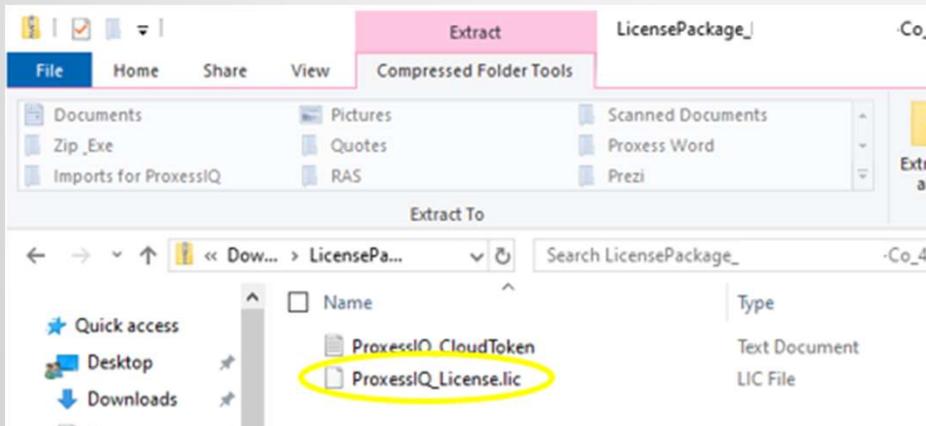
Click "Update License"

(Updating an Existing System)



...OR...

Locate the file location you save the .lic file to and double click on it.

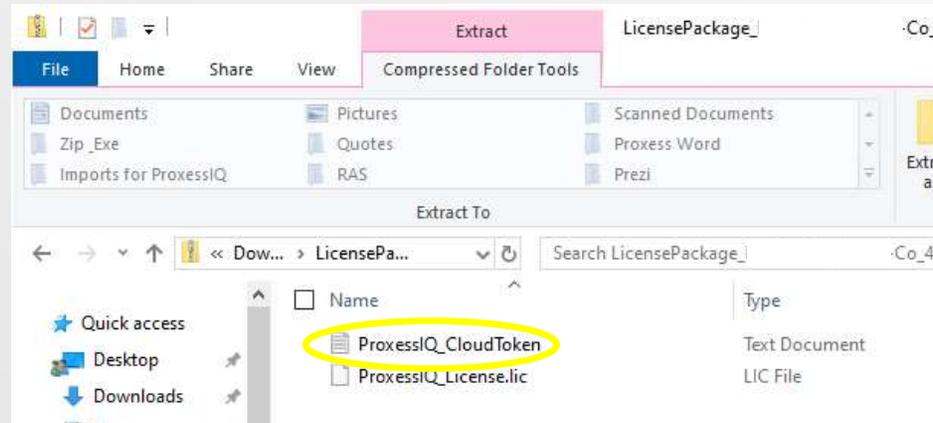


Your ProxessIQ software will now be licensed with the attributes that were purchased and you can return to the program to continue programming your system.

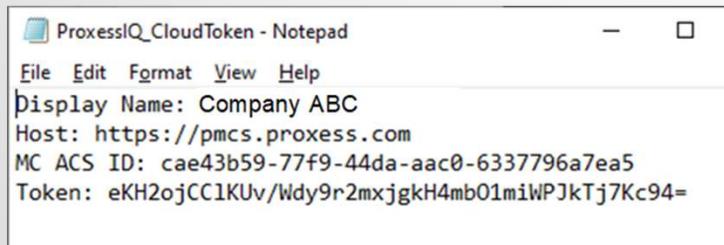


The second file you extracted from the .zip will provide you information to enable mobile credential operation.

Locate the file location you save the .lic file to and double click on "ProxessIQ_CloudToken".



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

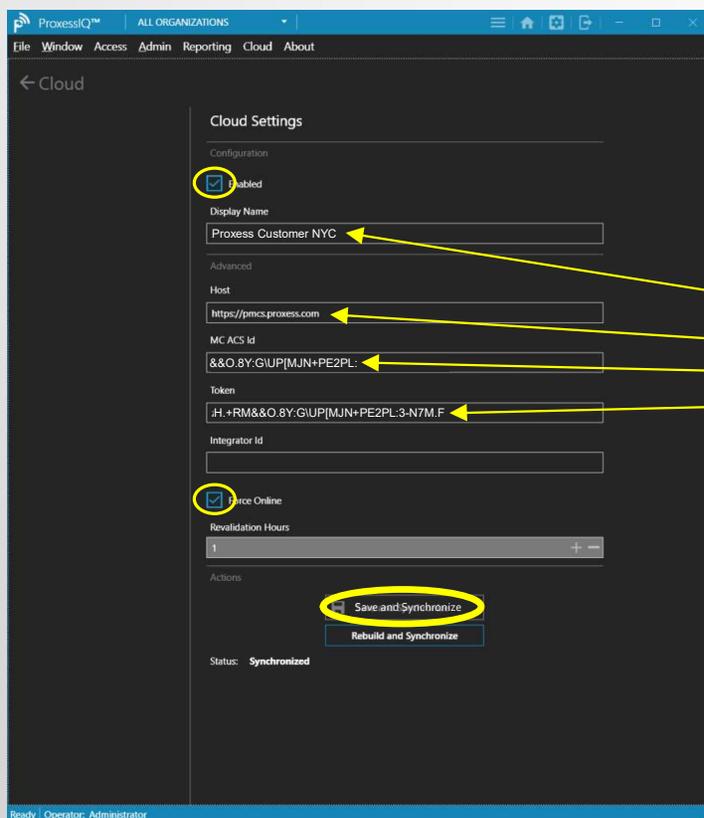
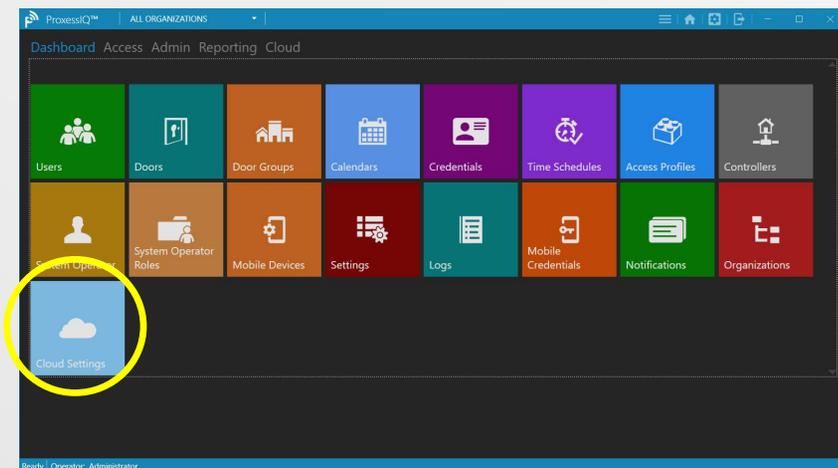


Once the data is entered, as explained below, your system will be provisioned with the number of mobile credentials your customer has purchased.

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™ Operator.



From the ProxessIQ dashboard, click on Cloud Settings .

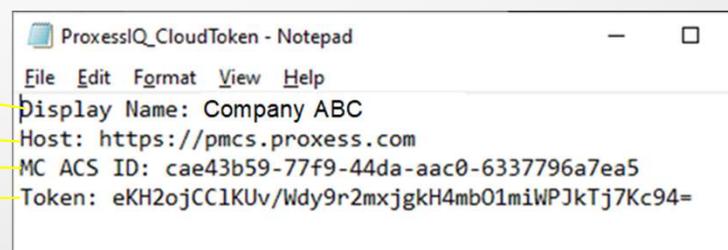


Check the "Enabled" box.

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™

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

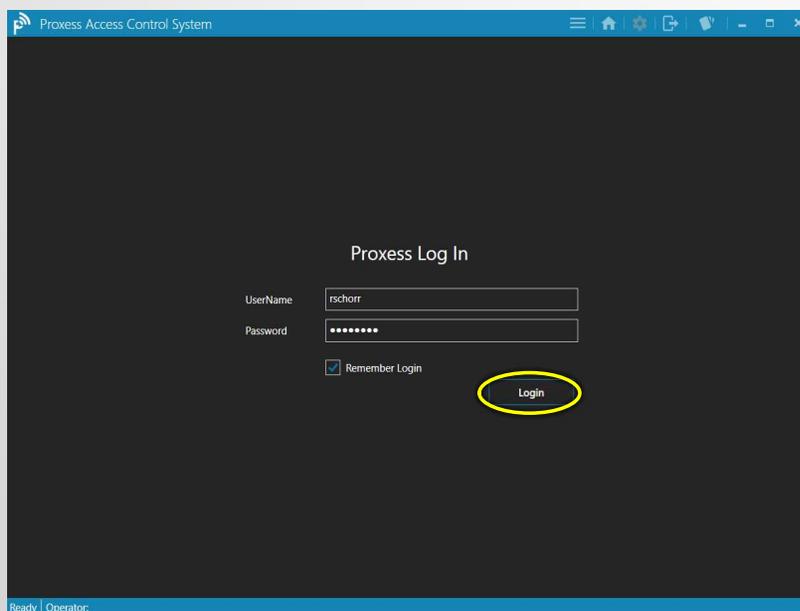
Each module has dependencies on the previous modules, so attempting to configure a system out of this order may not be the most efficient, as it may result in the need to go back to the prescribed order to fill in various missing data entry fields.



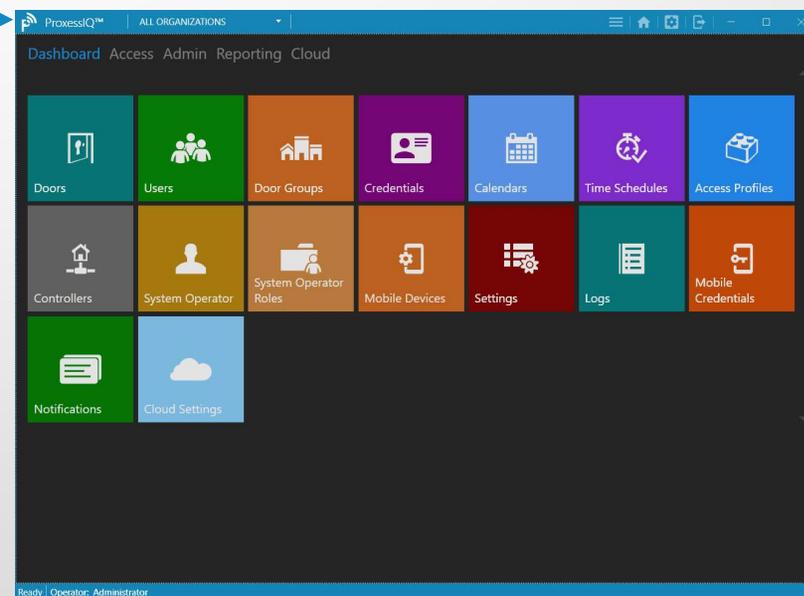
Opening the ProxessIQ Client Administrative Interface



Click on the ProxessIQ icon from the Windows Program list, Computer Desktop or Task Bar



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.



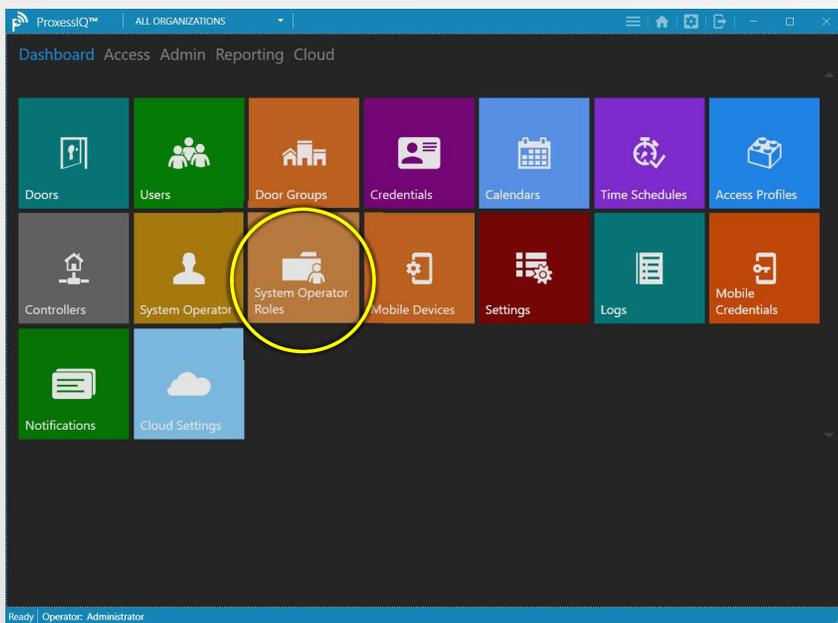
The Dashboard \ Home Screen will appear. In a later section we will show how to add the shortcut menu and change the background and icon colors, order and visibility. Click on the Module/Menu (the large icons) you wish to enter.



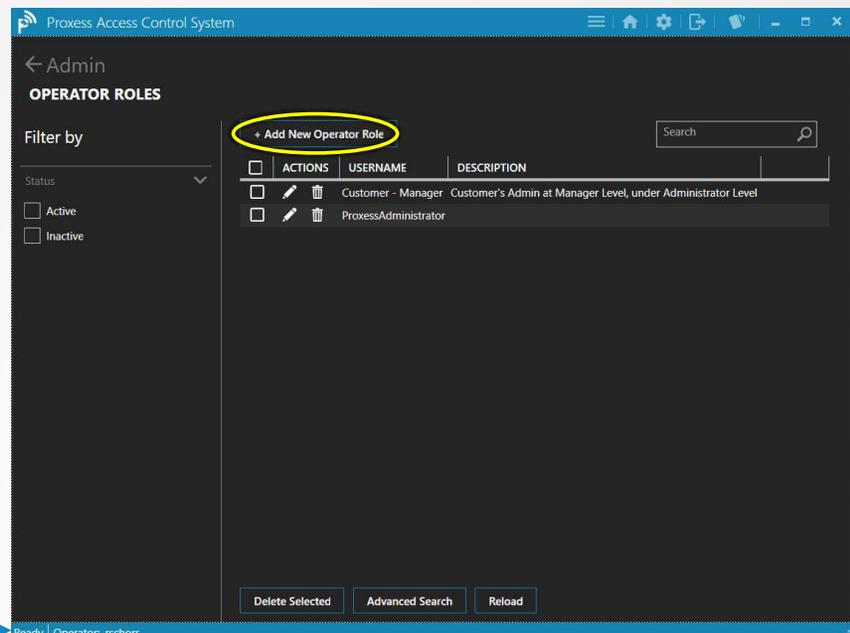
OPERATOR ROLES



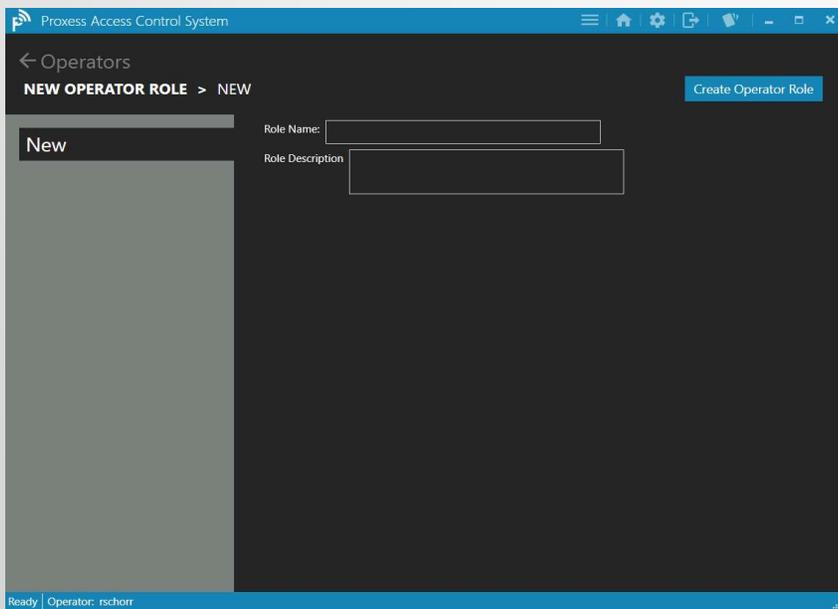
Operator Roles - 1



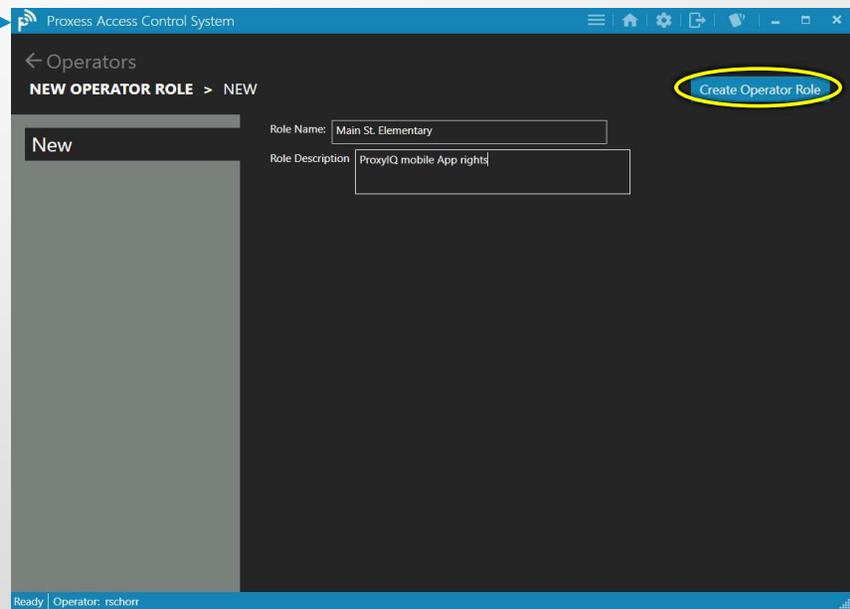
Operator Roles define what Modules (the large icons) Operators will have access to and what actions they will be able to perform once in that section. Click "System Operator Roles".



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



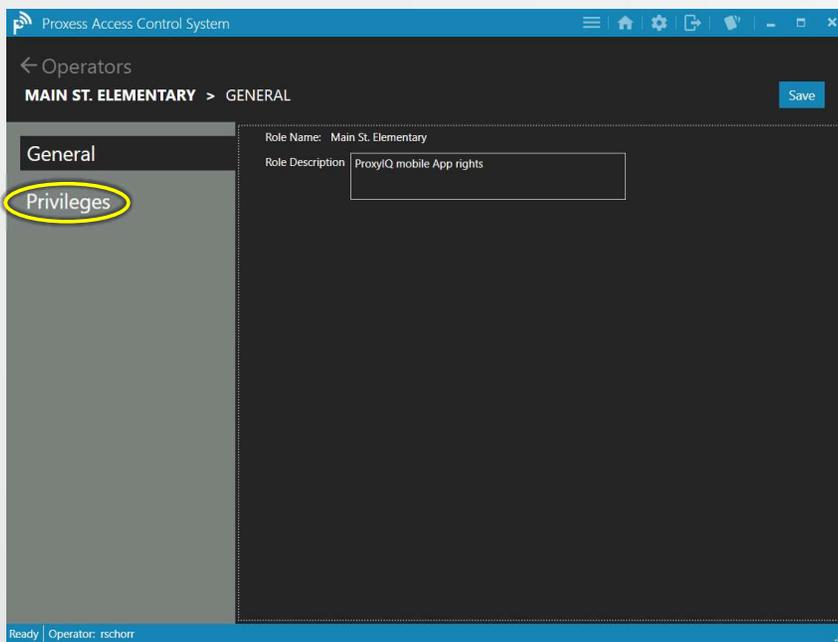
The following screen will open, for creation of the new Operator Role.



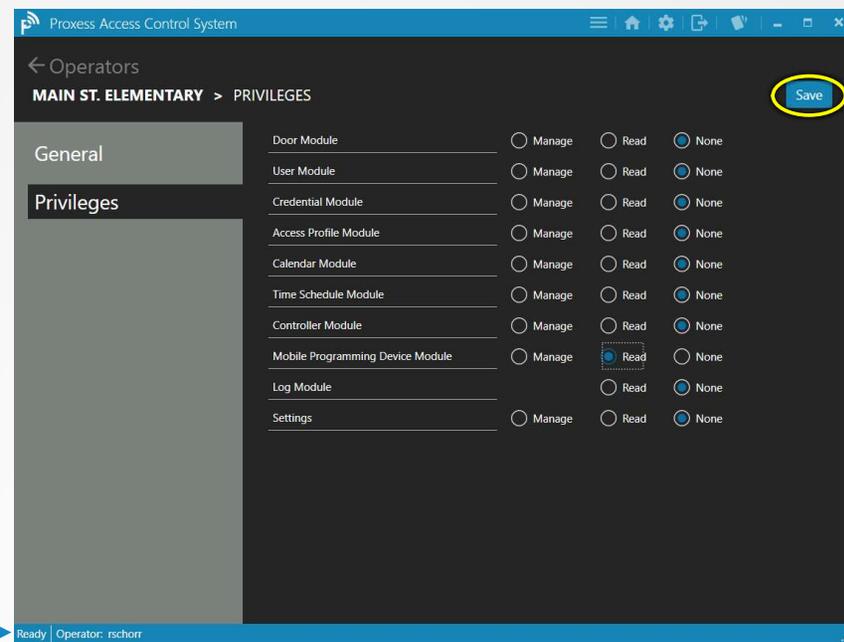
Enter a descriptive name for the Role, considering all the future possible names that may be in your system, to avoid future naming conflicts. You may add any descriptions that may assist you and the team. Click on the Create button when complete.



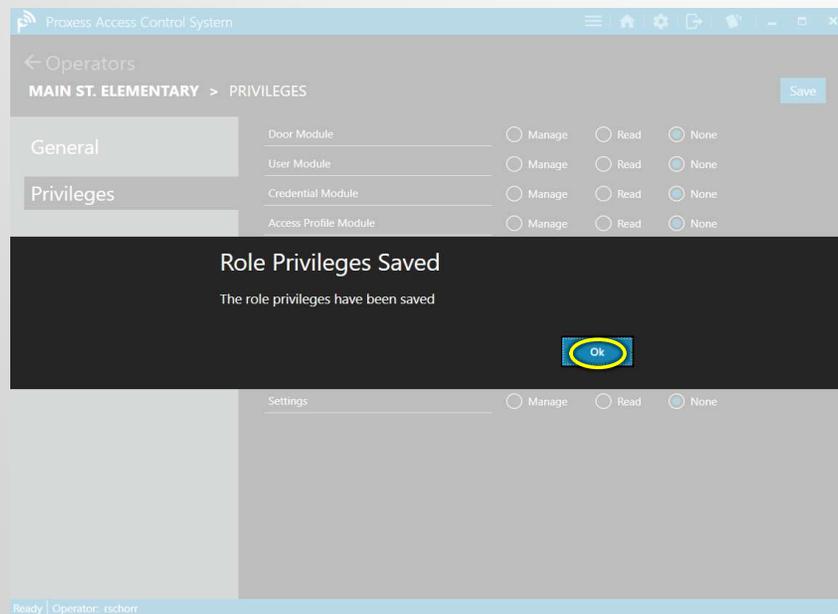
Operator Roles - 2



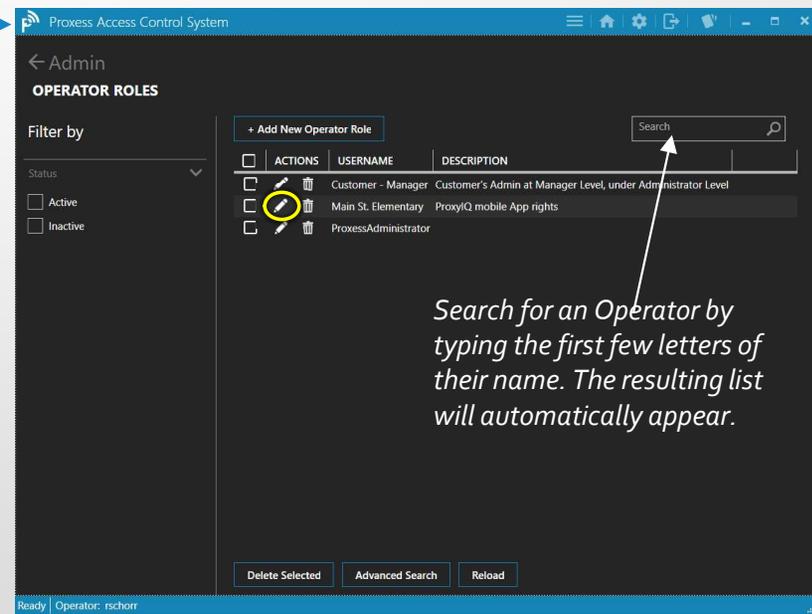
Once the new Role has been created, click on the Privileges button to define their modules and rights access.



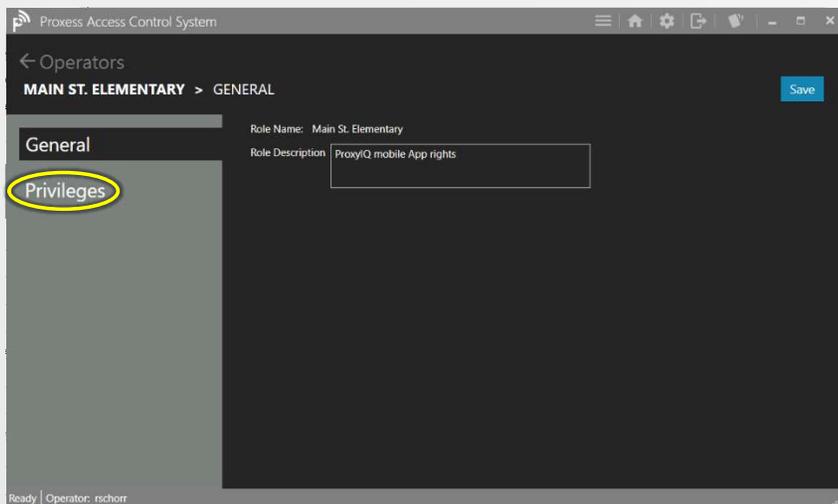
For each of the listed ProxessIQ™ software modules, click the radio button for the rights this Role will have once an Operator with this Role logs in. "Manage" allows editing and "Read" only allows viewing within each module. Click "Save" when complete.



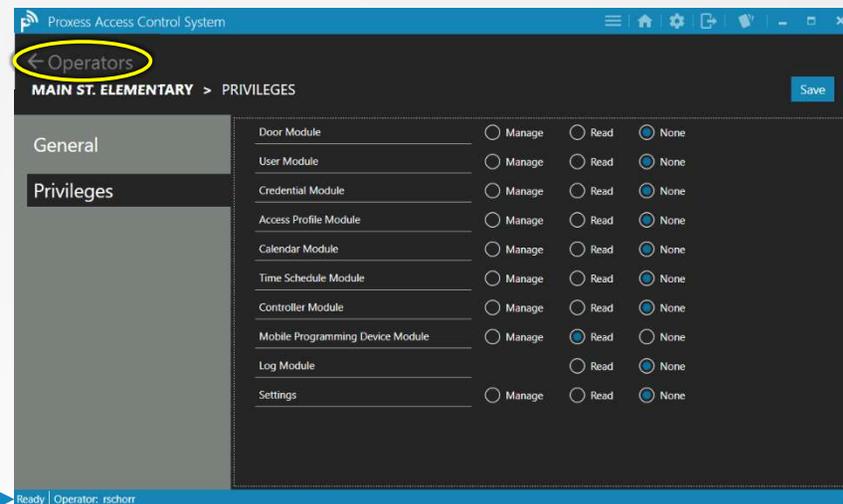
The above screen appears. Click "OK".



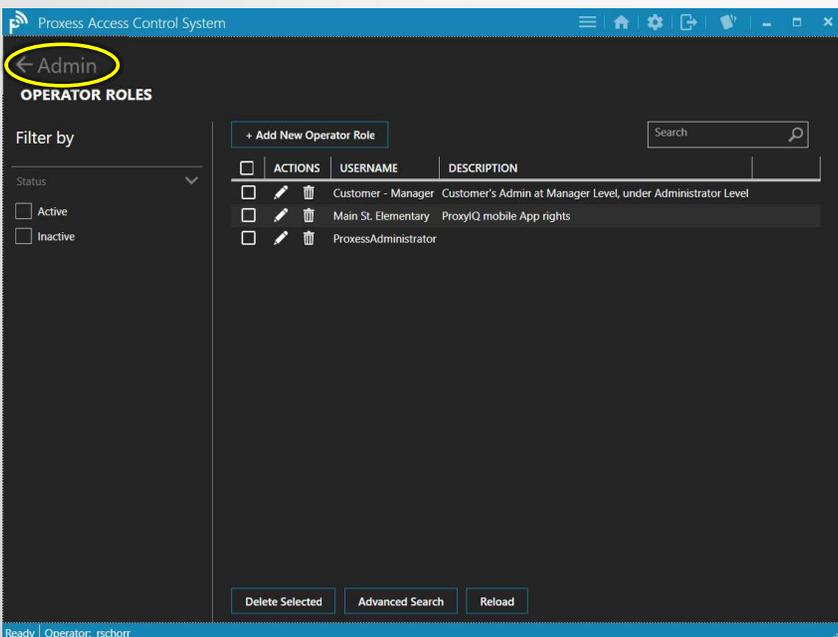
To review or edit any Role, click on the above icon. Other options on this page allow deleting existing Roles and filtering down a longer list of Roles, using the Filter checkboxes, for Active and Inactive Roles, on the left side of the page, or searching by name.



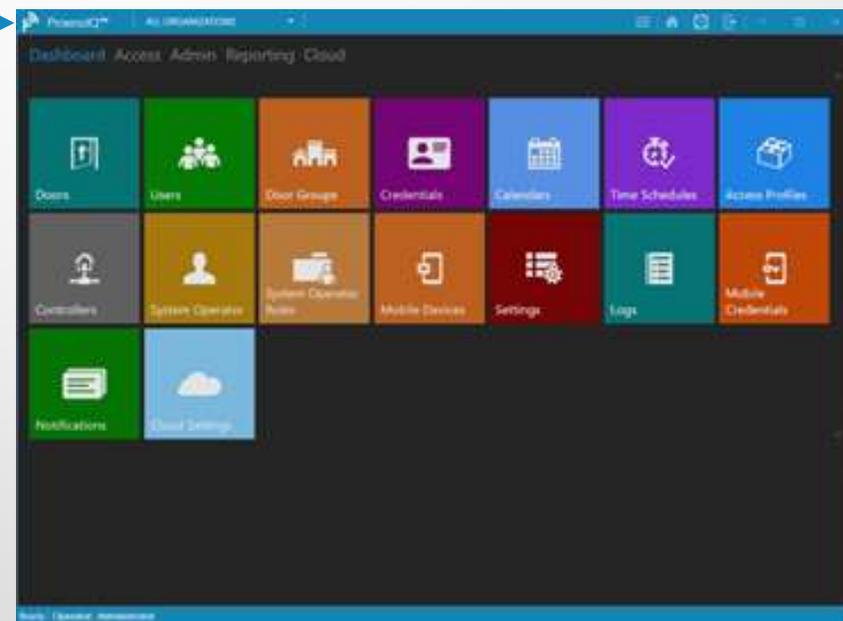
The Role you selected will appear. You may change any notes you wish. Click on the Privileges label to review those rights.



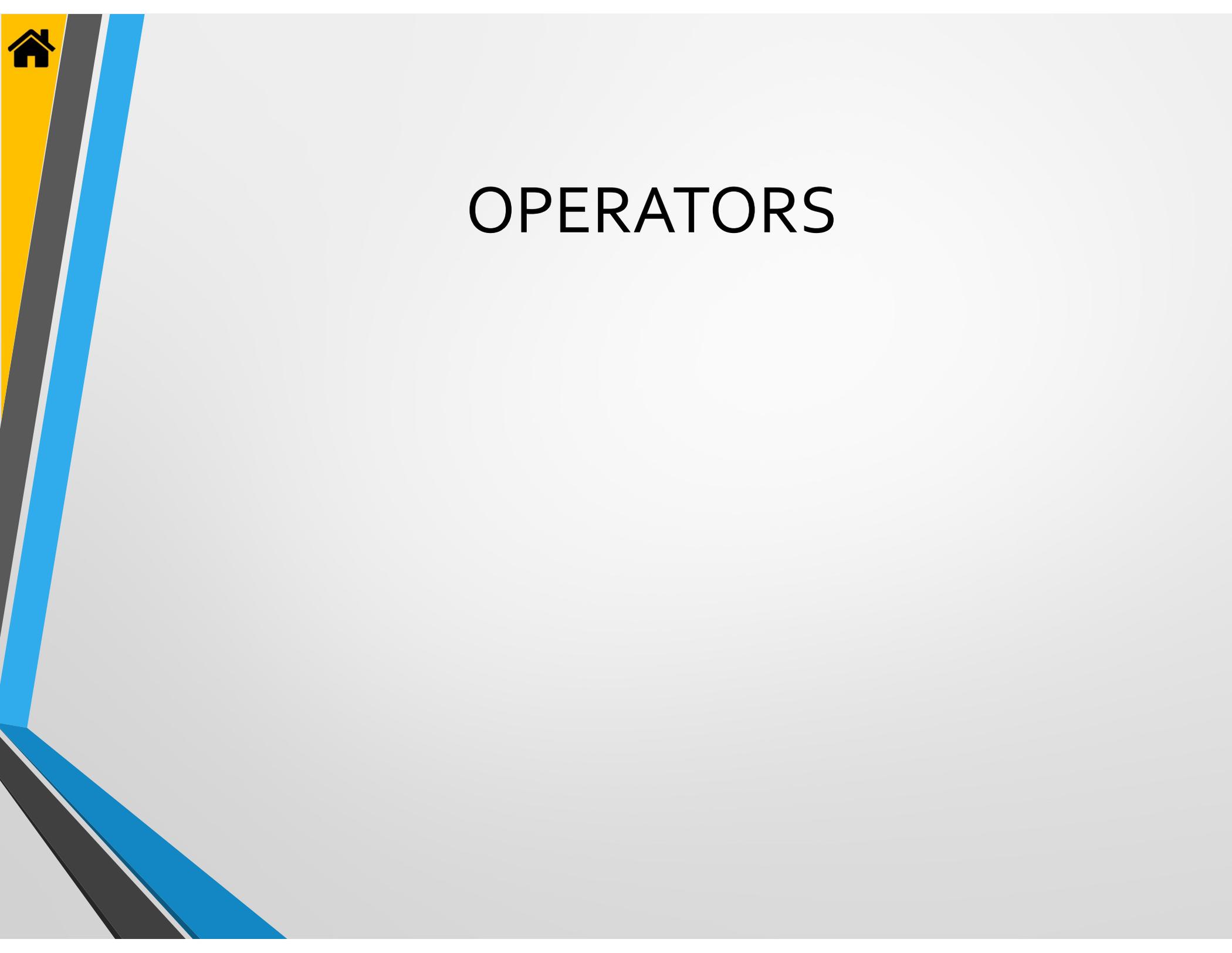
For each of the listed ProxessIQ™ software modules, click the radio button for the rights this Role will have, once an Operator with this Role logs in. "Manage" allows editing and "Read" only allows viewing within each module. Click "Save" when complete and "Operators" to return to the main Operator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



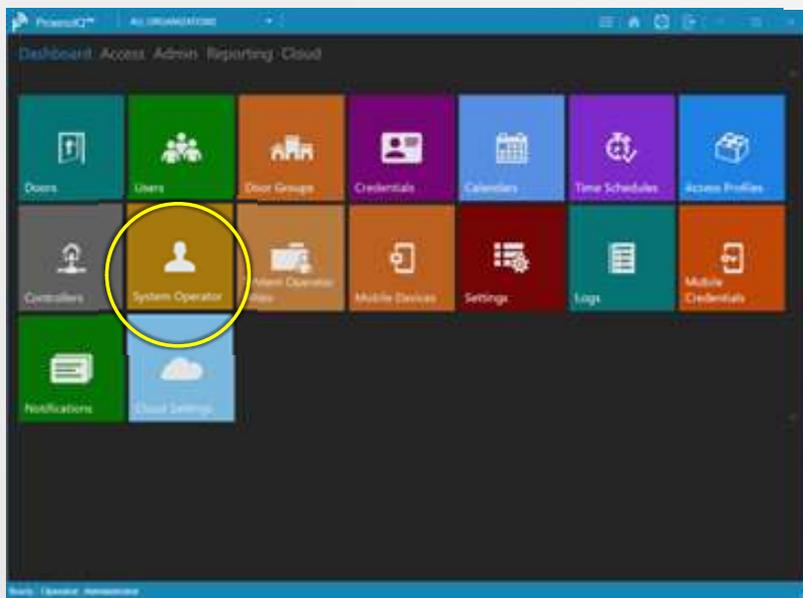
The main Operator Roles screen appears. Click on the "Admin" tag to return to your Home view.



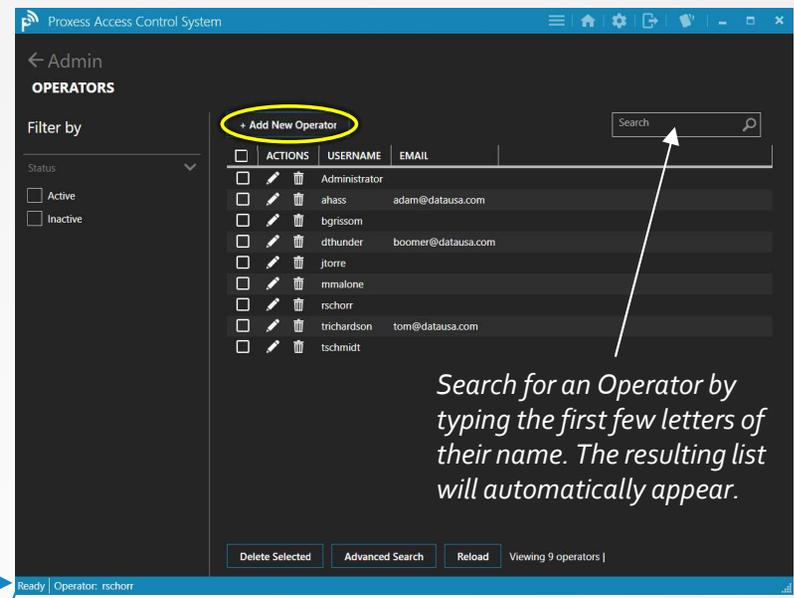
You will be returned to your Home Screen \ Dashboard.



OPERATORS

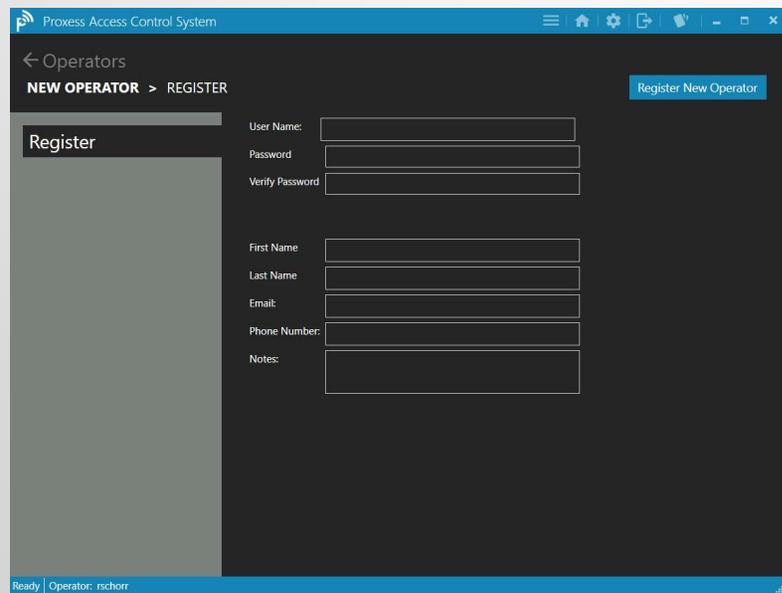


From the Home Screen (Dashboard) click on the System Operators icon, where you will be able to add and modify individual operators\programmers, including assigning them to one or more Operator Groups.

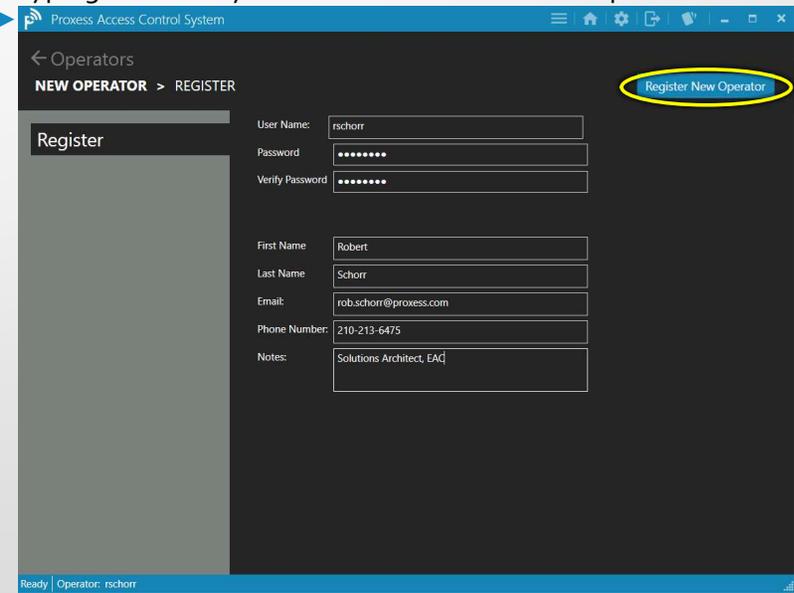


Search for an Operator by typing the first few letters of their name. The resulting list will automatically appear.

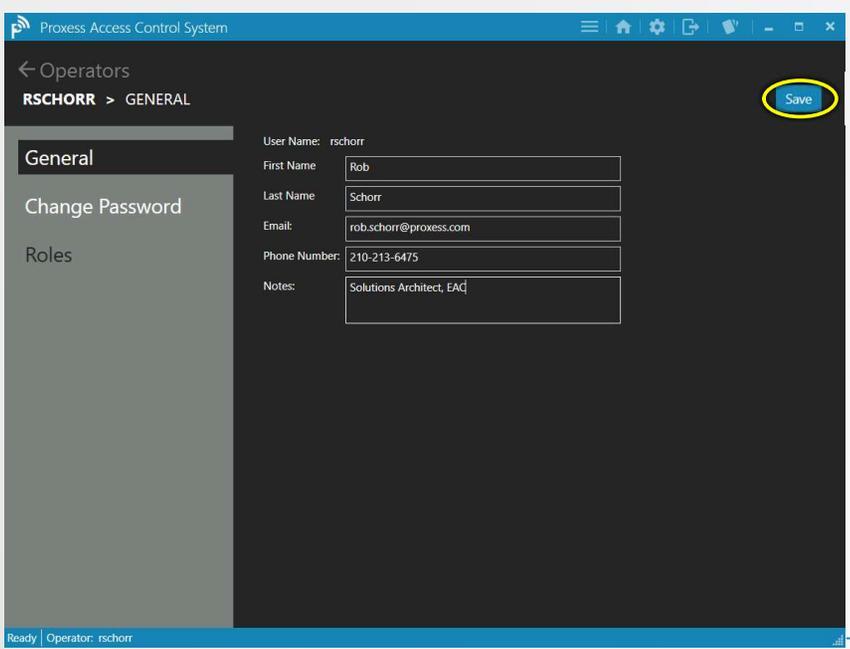
Click on "Add New Operator" to perform this action. Other options on this page allow editing and deleting existing Operators and filtering down a longer list of Operators, using the Filter checkboxes, for Active and Inactive Operators, on the left side of the page. Or, search for a specific Operator by typing the letter you know of the name of that person.



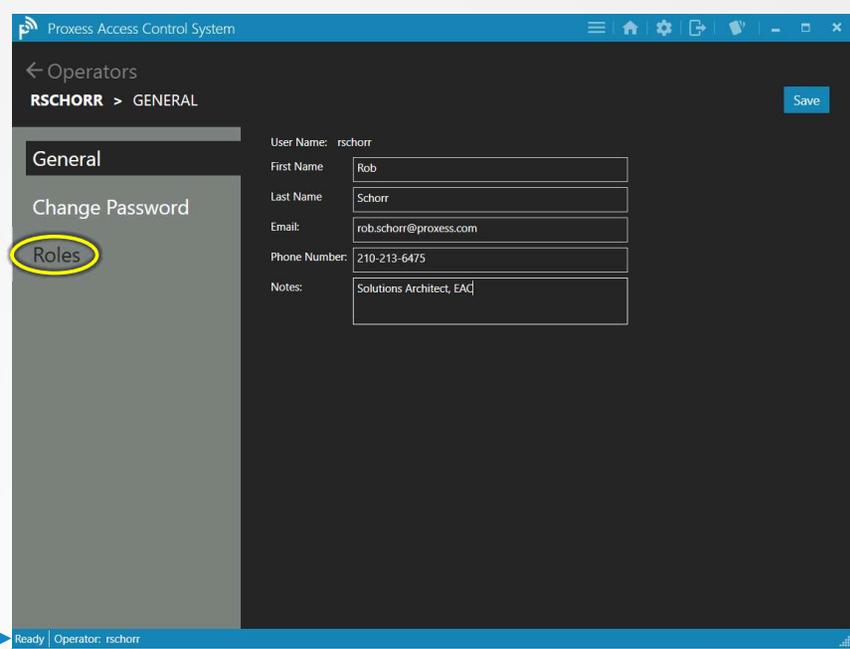
The main New Operator screen appears, showing the mandatory and optional fields. You may click on the "Operators" tag to return to the main Operators list.



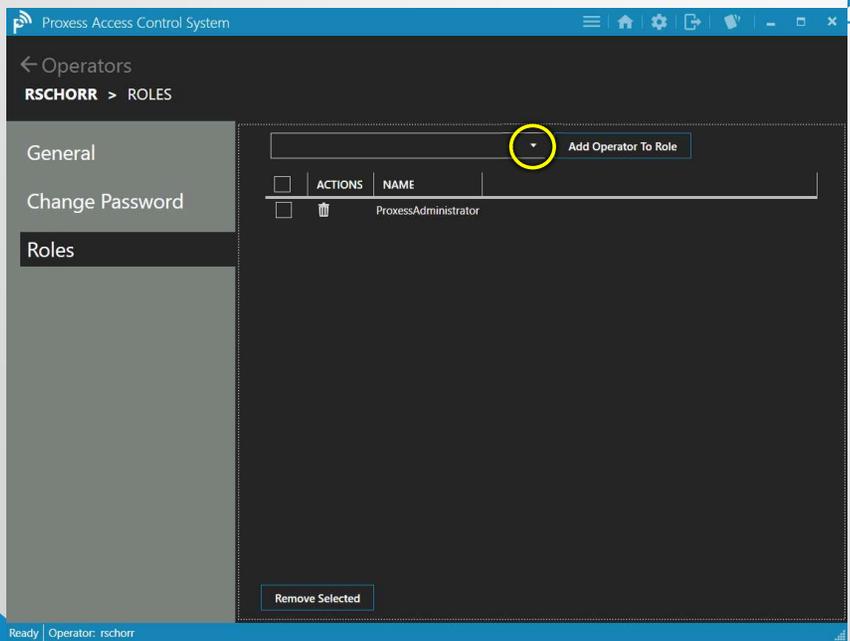
Create a case-sensitive User Name and Password, ensuring to verify the password exactly. No spaces are permitted in these fields. Enter a first and last name and a valid email, for use in later modules. The phone number and notes are optional. Click Register when complete.



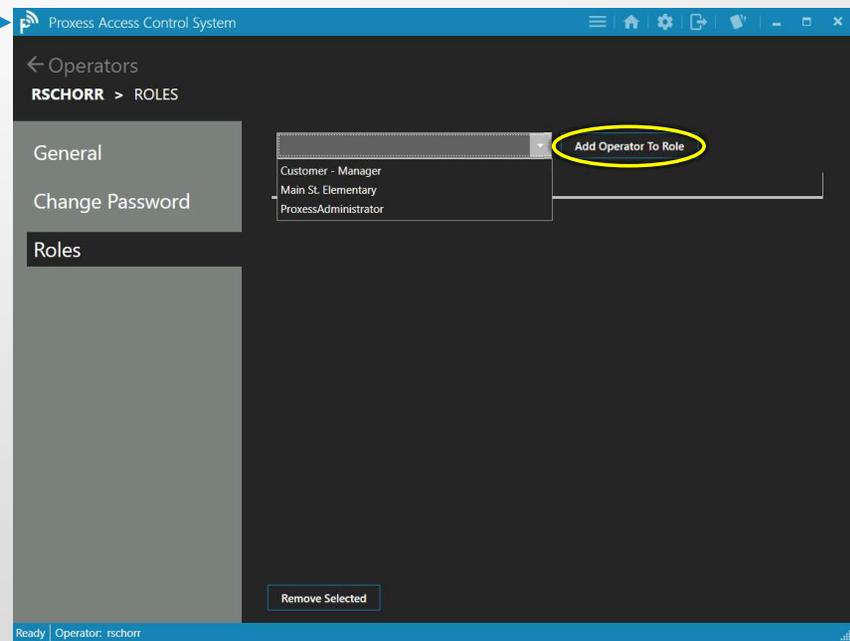
The details for the Operator which you have just registered will appear. You may edit these details, including clicking on "Change Password" to do so, or click "Save".



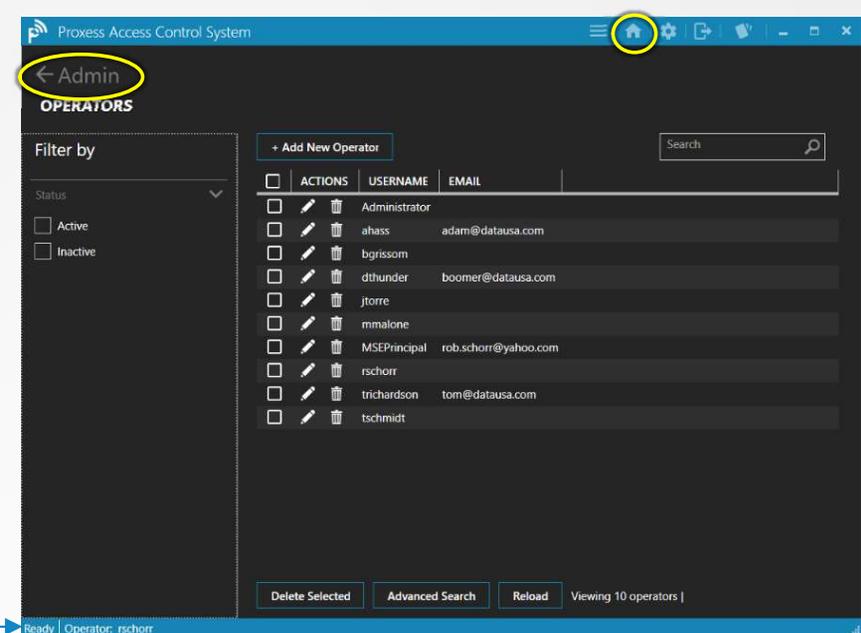
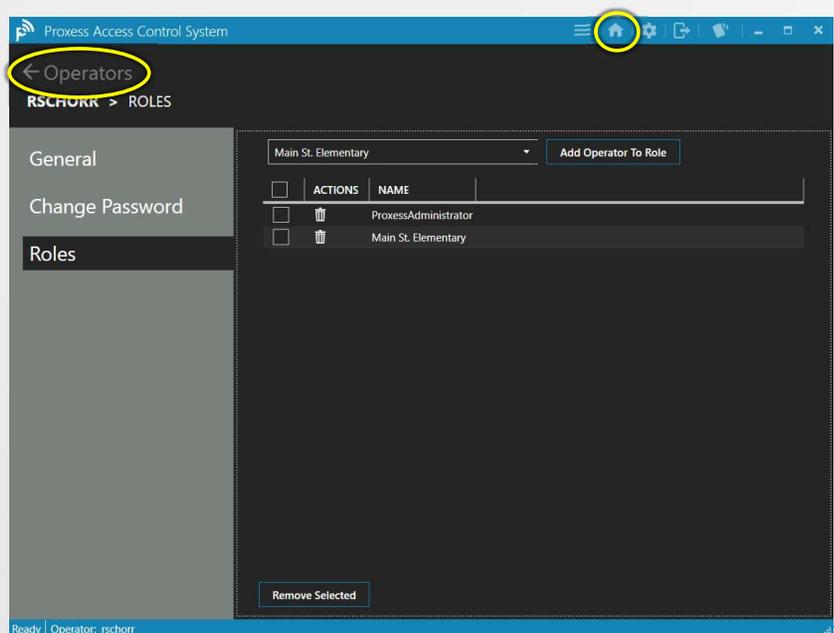
Click on the Roles button to assign this individual to a category of rights within the software.



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



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

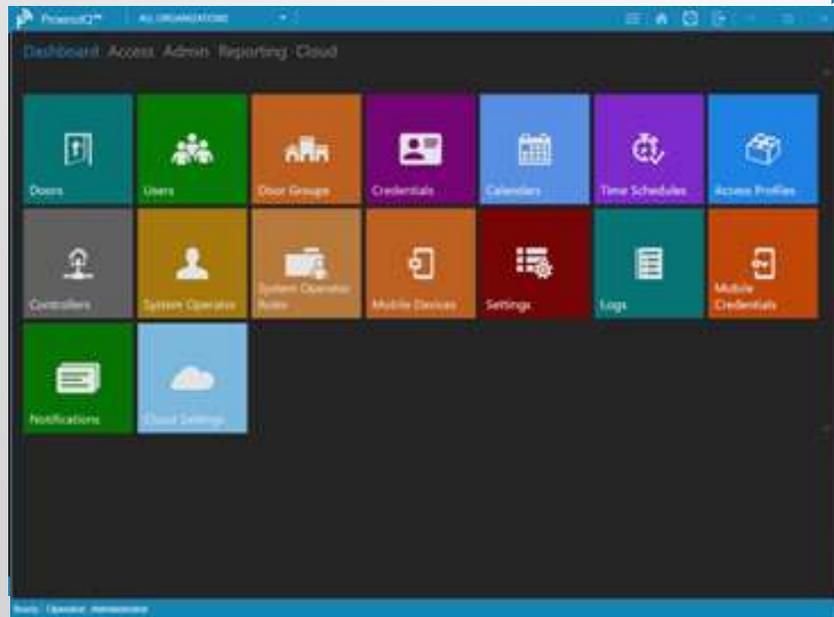


Ready | Operator: rschorr

Ready | Operator: rschorr

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

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



Ready | Operator: rschorr

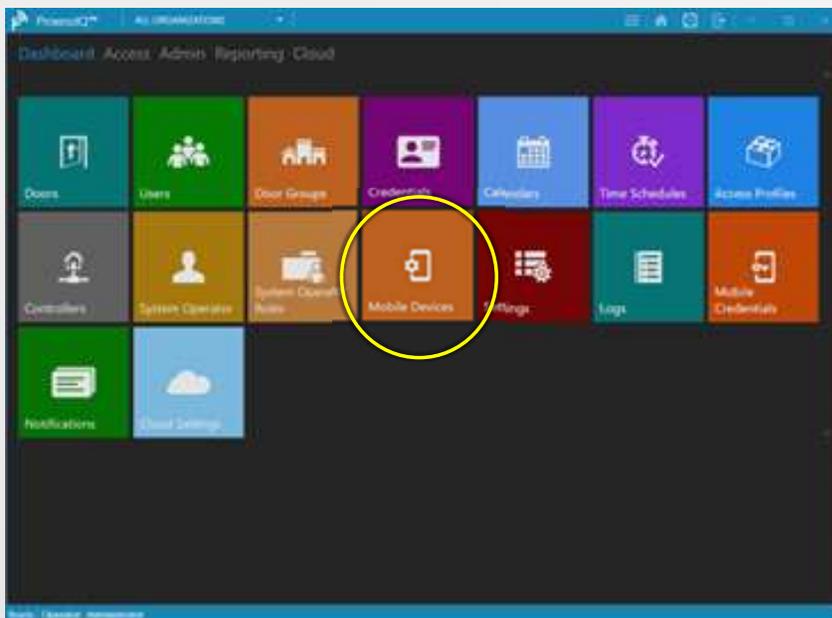
You have returned to the Dashboard \ Home Screen.



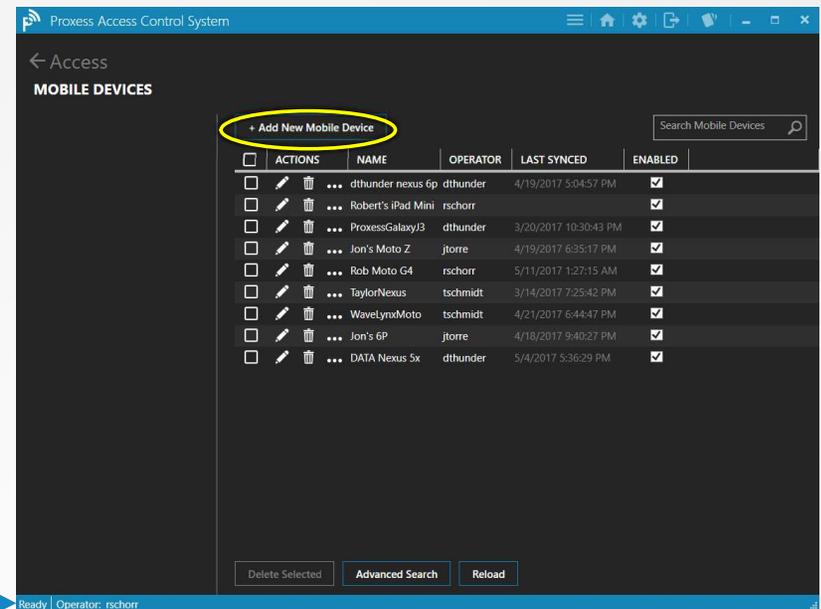
MOBILE DEVICES



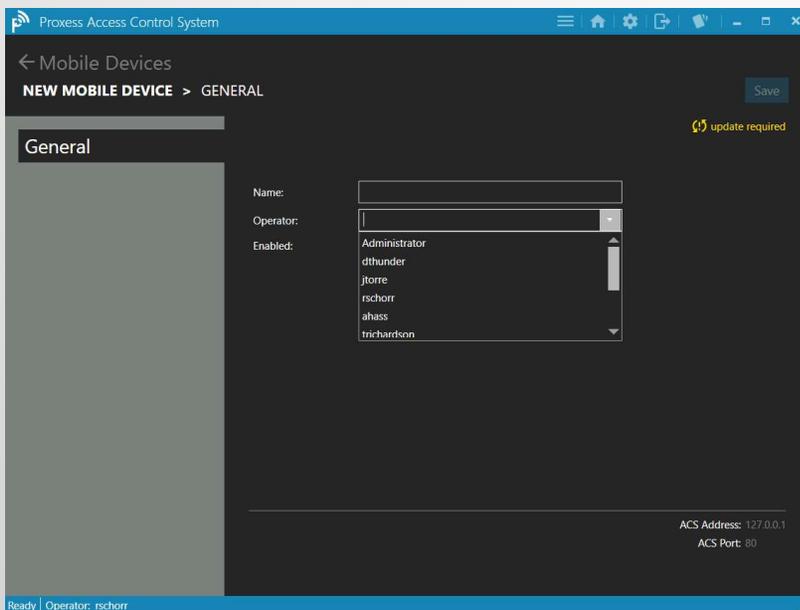
Mobile Devices - 1



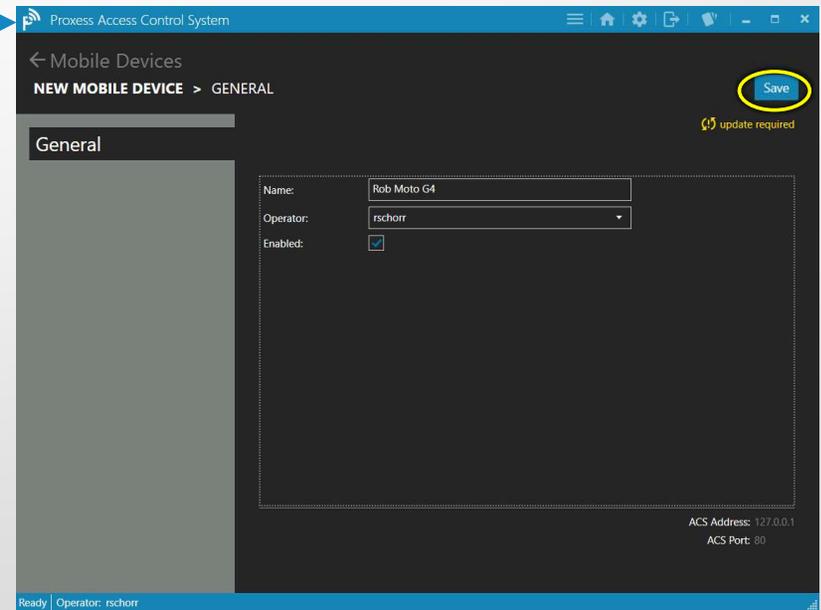
To add a new (and manage existing) mobile phone to be used as an in-the-field programming device click on the "Mobile Devices" module icon.



This is the list of all the registered mobile phone Apps in the system. Click "Add New Mobile Device" to do so. To return to the Home Screen \ Dashboard, click on either the Home icon on the top task bar, or the "Access" tab at the top left of the page.



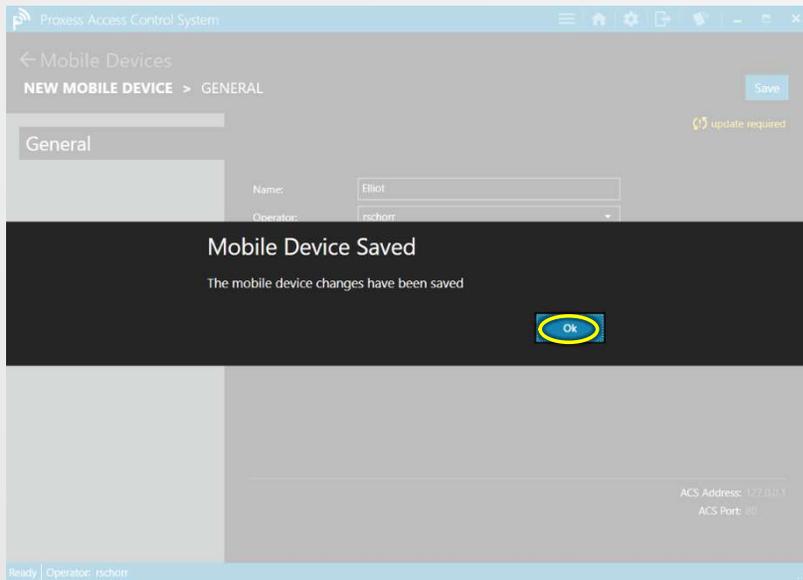
Enter a name for the mobile phone to be added. Select the responsible Operator for this App from the drop-down list.



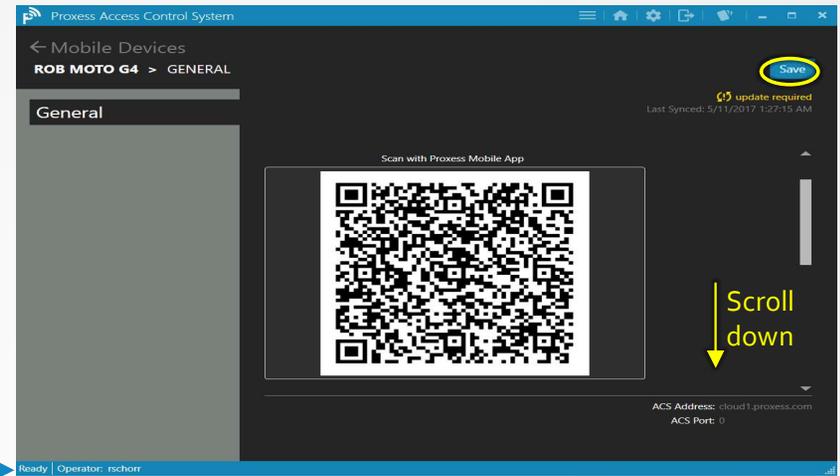
Check the Enabled box and click "Save".



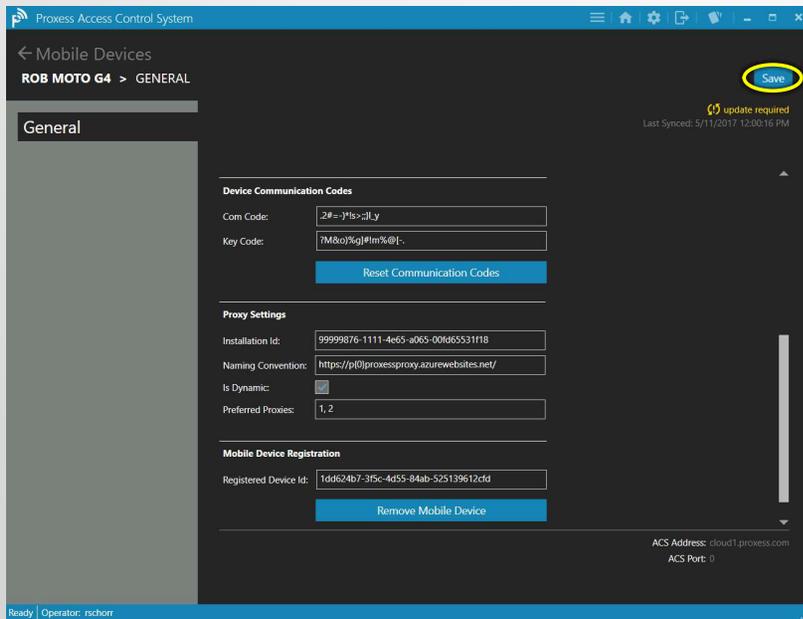
Mobile Devices - 2



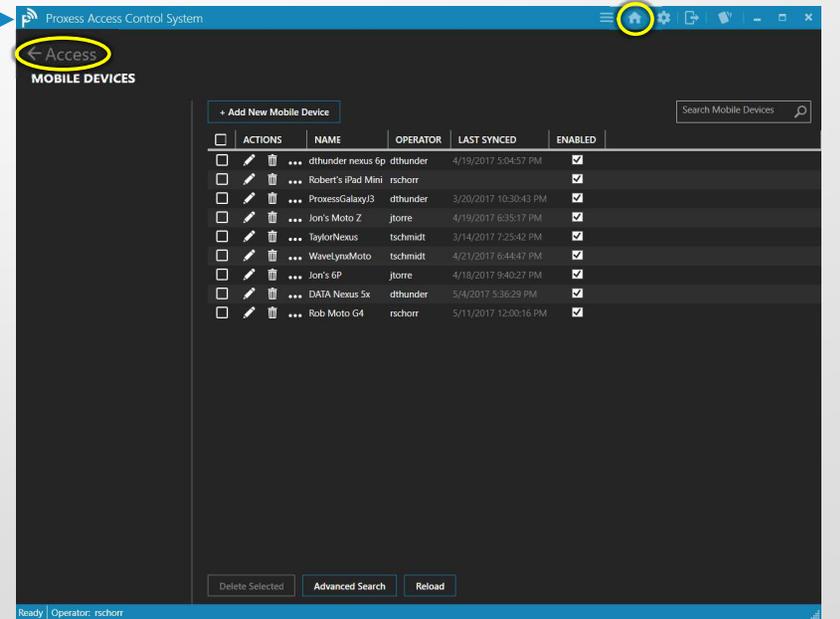
Click "OK".



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.



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



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



MOBILE PHONE APP

Proxess Sync™ INITIALIZATION

This section will show you how to add your administrative phone app, Proxess Sync™ 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.

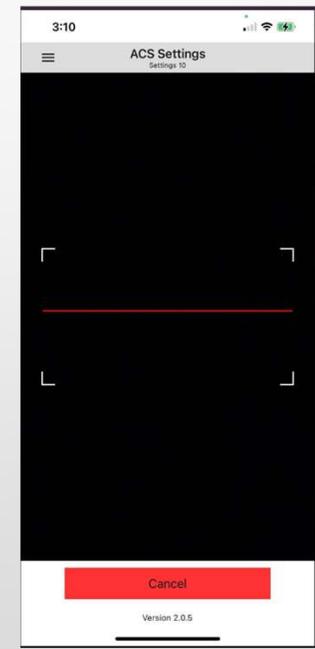


Click the Proxess icon to open the App.



Allow the app to use the camera on your phone.

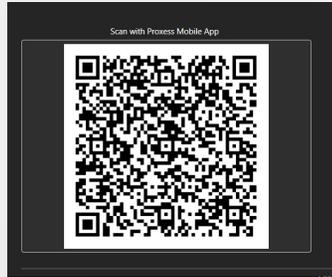
Mobile App Screenshot



PC Software Screenshot

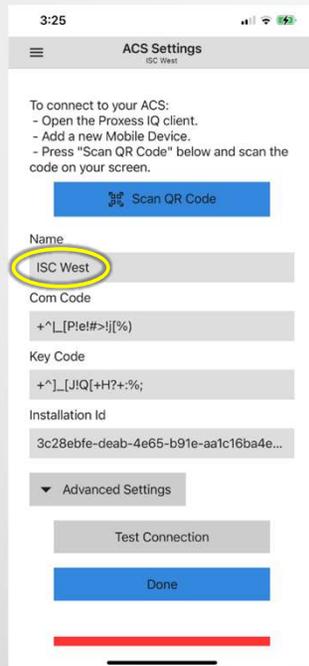


The app will open and ask you to confirm you will allow it to use the camera on your phone. Confirm this and the above scanner image will open. Point your phone's camera to view the QR code that appears in the screen in the software when your new Mobile Device was added, shown in the image on the right.

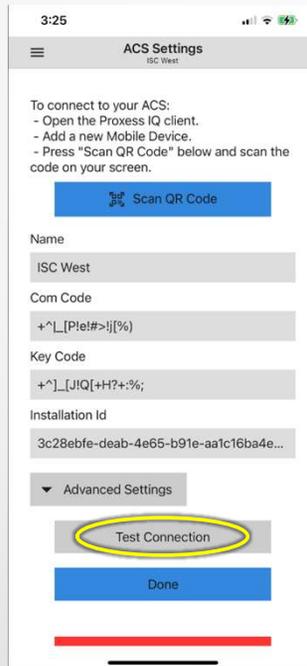


NOTE: There are a few ways to scan the QR code in the software with the mobile phone being added:

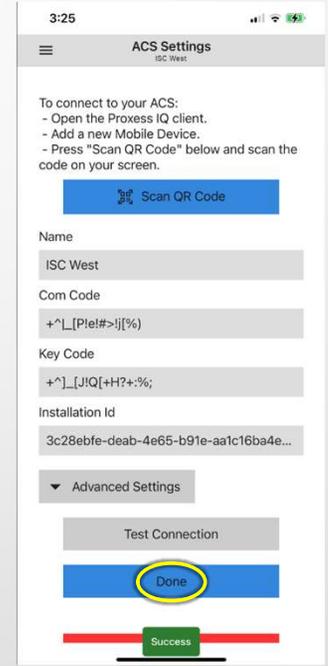
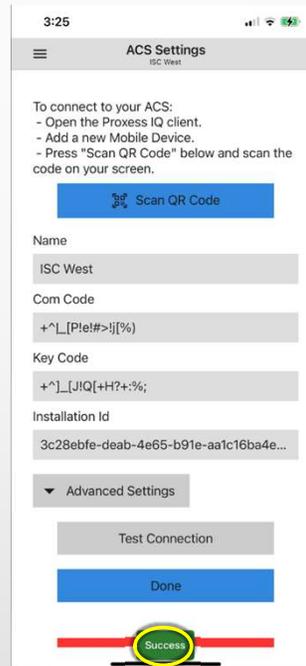
- The first is to bring the phone to the software, open the “Mobile Devices” module and click the edit button for the mobile device being added where the QR code will then appear. With the scanner screen open, hold the phone over the code and all of the connection data will automatically populate as 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.

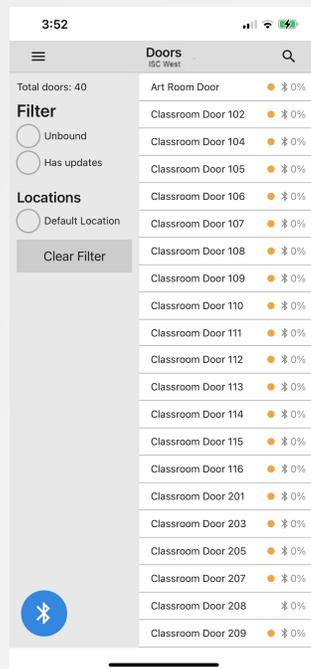
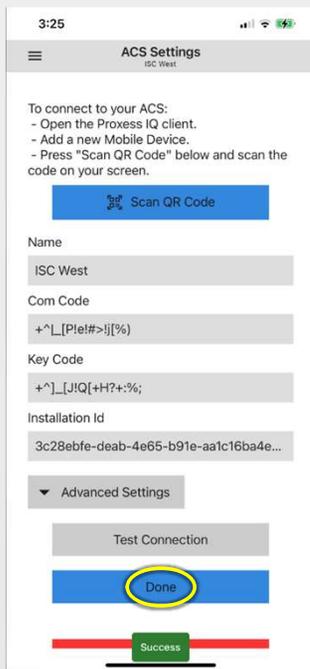


At the bottom of the screen, you may click “Test Connection” to verify the setup was successful.

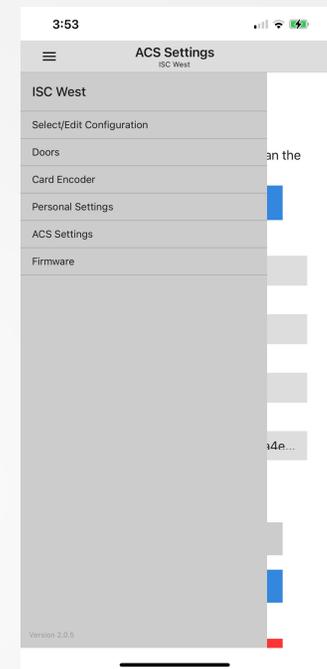
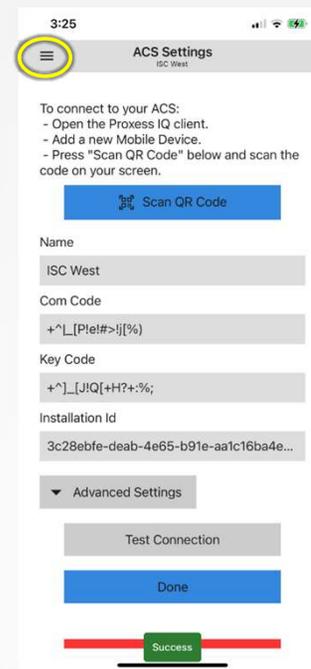


Click Done to return to the Proxess Sync™ Home screen for this system.

NOTE: In order to assure the Test works, it is necessary to verify that the phone has connectivity to the ProxessIQ™ 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.

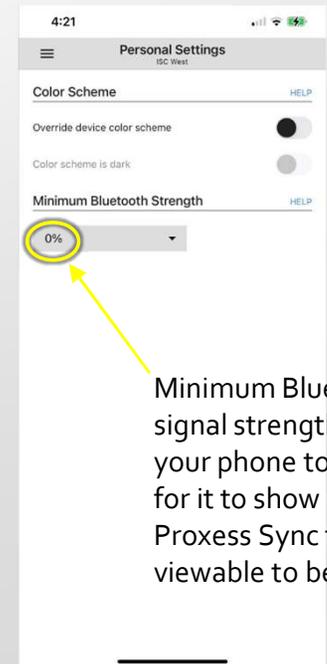
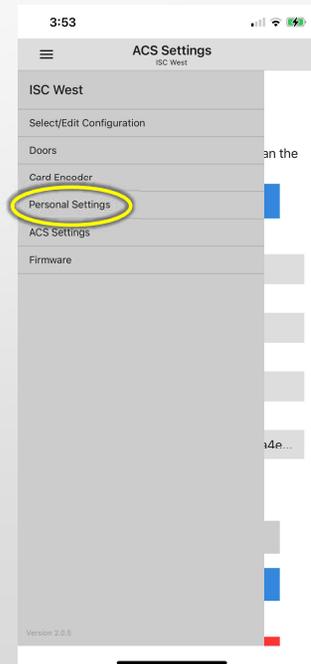
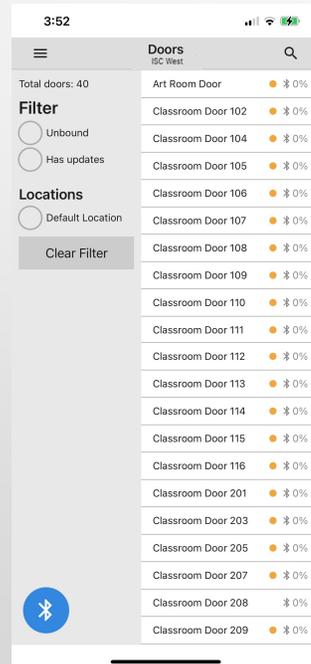
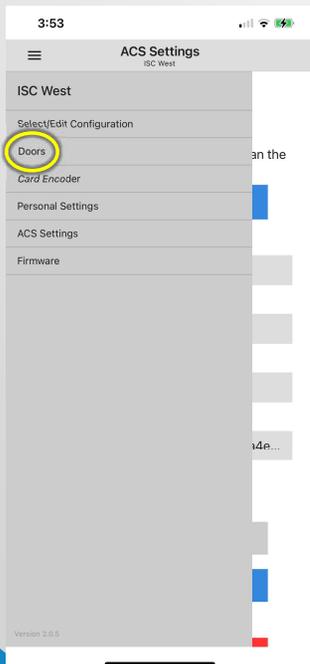


...OR...



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.

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



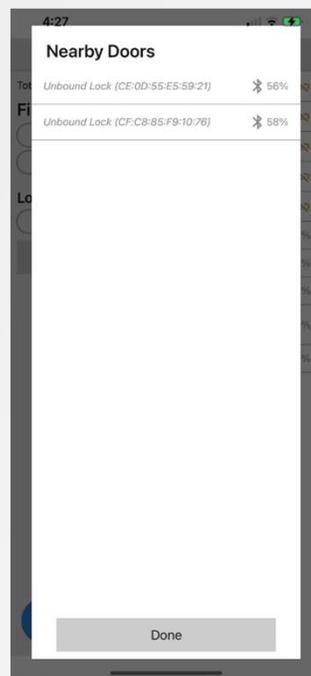
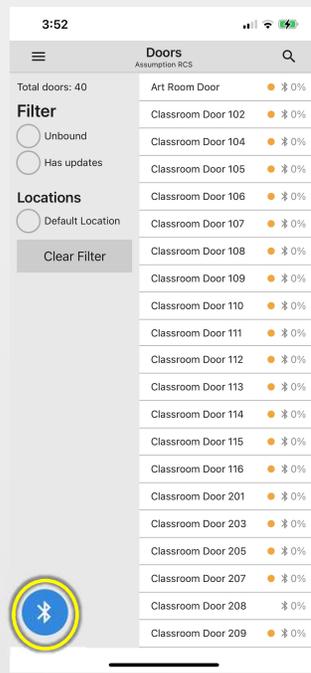
Minimum Bluetooth signal strength from your phone to a lock for it to show up in Proxess Sync to be viewable to be sync'd.

Click on Doors to bring you to the Doors screen.

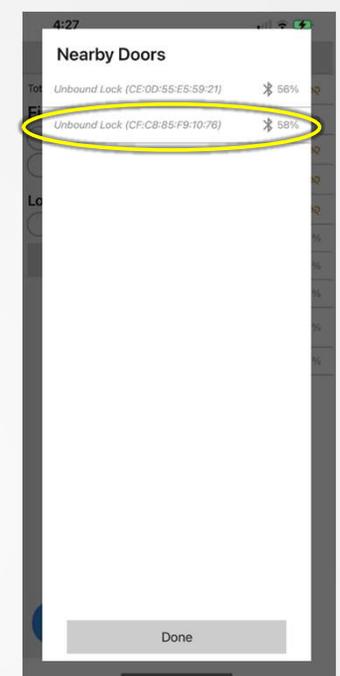
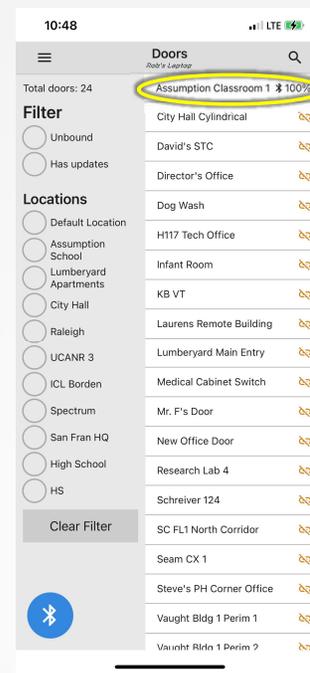
Click on Personal Settings to bring you to the that screen.



Proccess Sync™ Initialization - 4

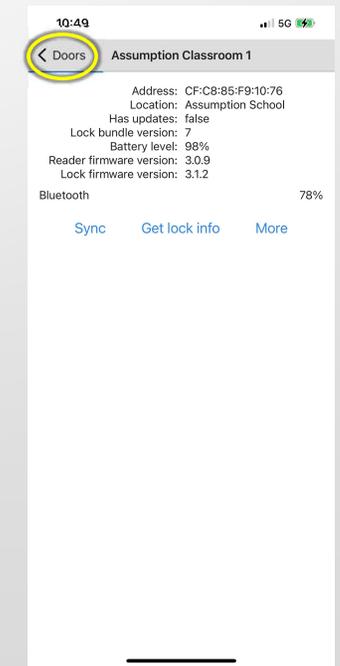
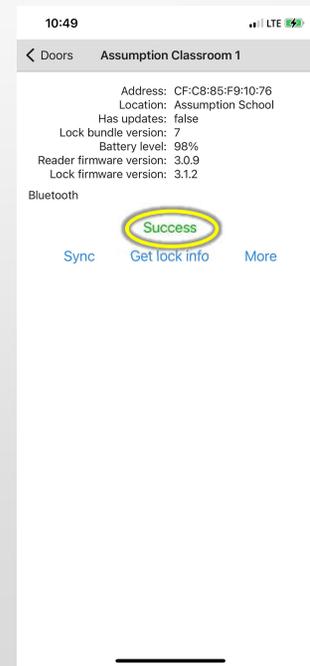
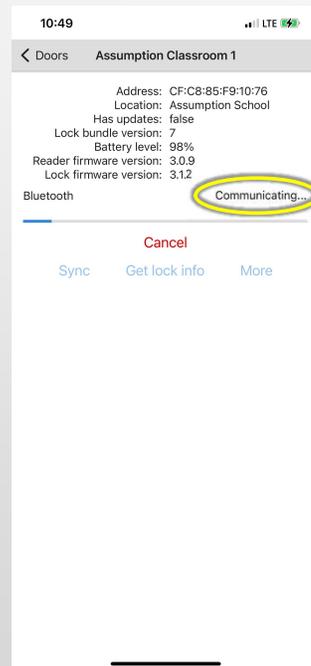
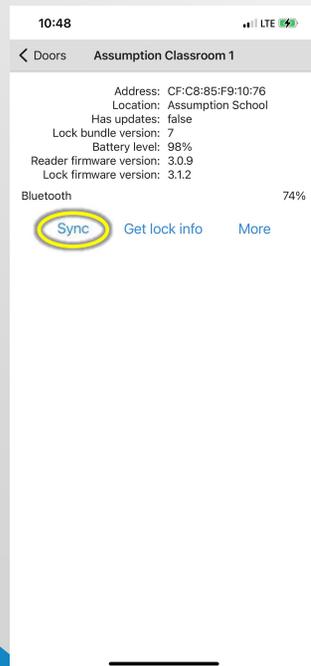


...OR....



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

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 initialization, be sure to select an "Unbound" lock.



Click Sync to initialize or update a lock.

Success will be displayed and you can return to the Doors screen.

Android

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

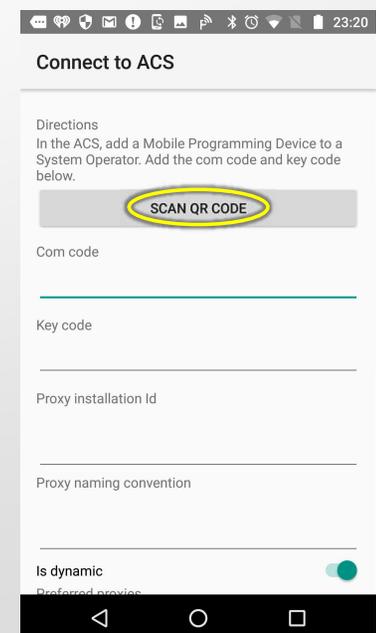
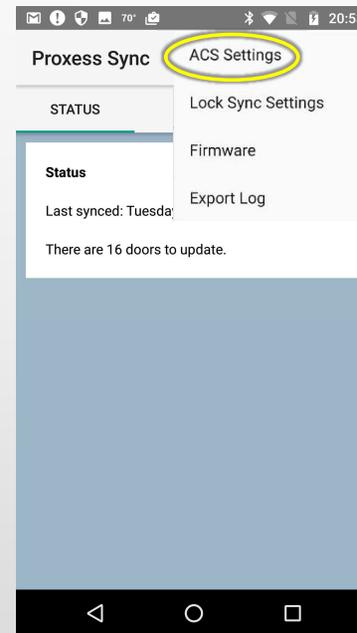
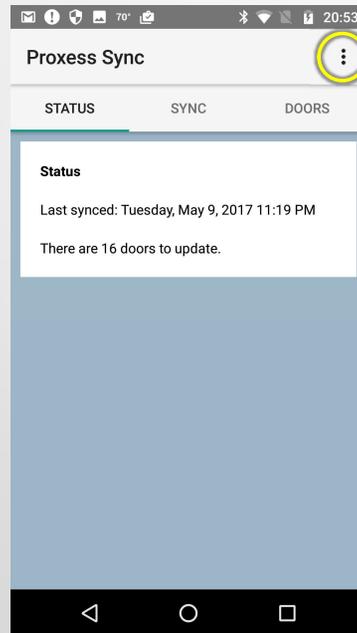


For lockset communication, assure Bluetooth is turned on.

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



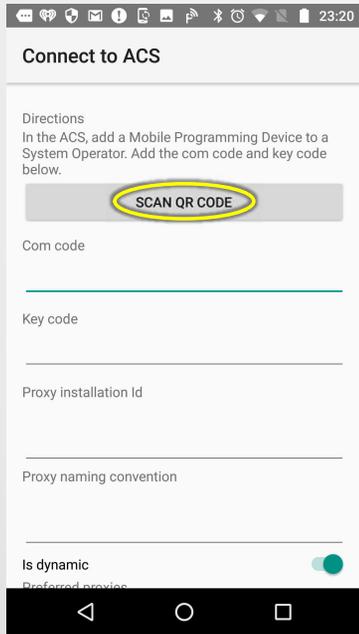
Click the Proxess icon to open the App.



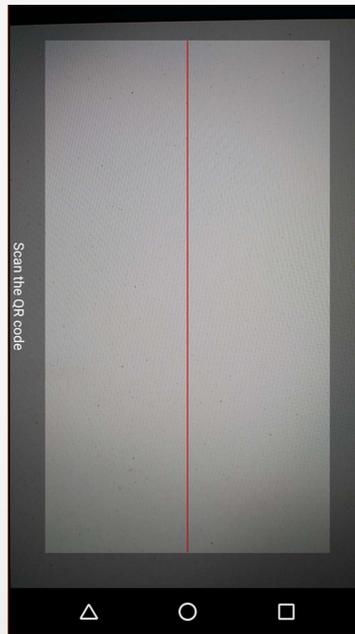
The screen on the left will appear the first time the App is opened. Future openings of the App will display the last screen viewed from the last time the App was closed. Click the icon circled. Then click "ACS Settings" from the menu. The screen on the right appears. To initiate the App, click on "Scan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



Mobile App Screenshot



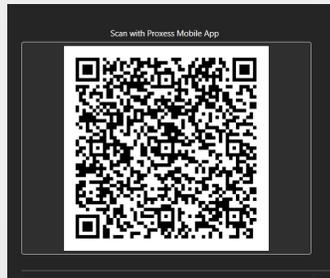
Mobile App Screenshot



PC Software Screenshot

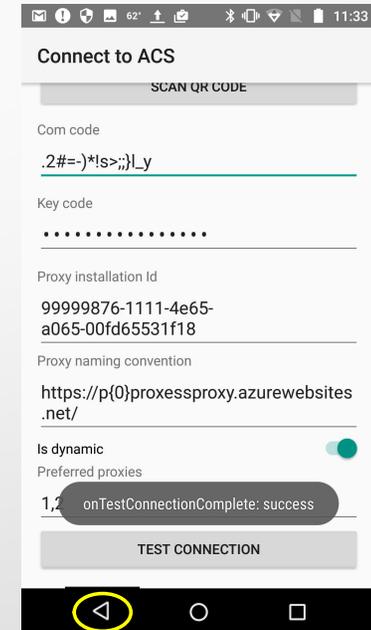


The screen on the left opens. Click the "SCAN QR CODE" button and the scanner screen in the center opens. This is a scanner, which uses your phone's camera to view the QR code that has appeared in the screen in the software where your new Mobile Device was added, shown in the image on the right.



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

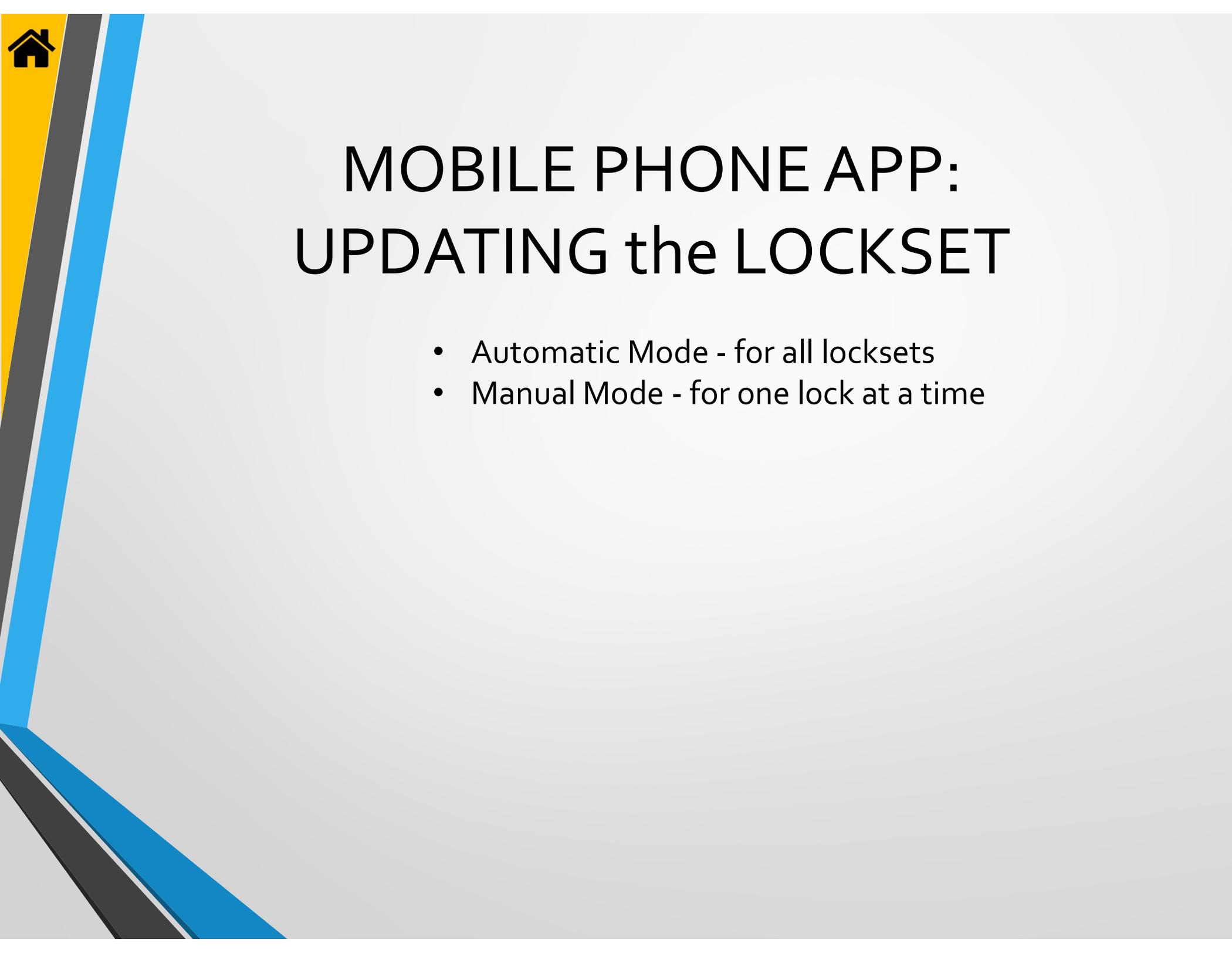
- The first is to bring the phone to the software, open the “Mobile Devices” module and click the edit button for the mobile device being added where the QR code will then appear. With the scanner screen open, hold the phone over the code and all of the connection data will automatically populate as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



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

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

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



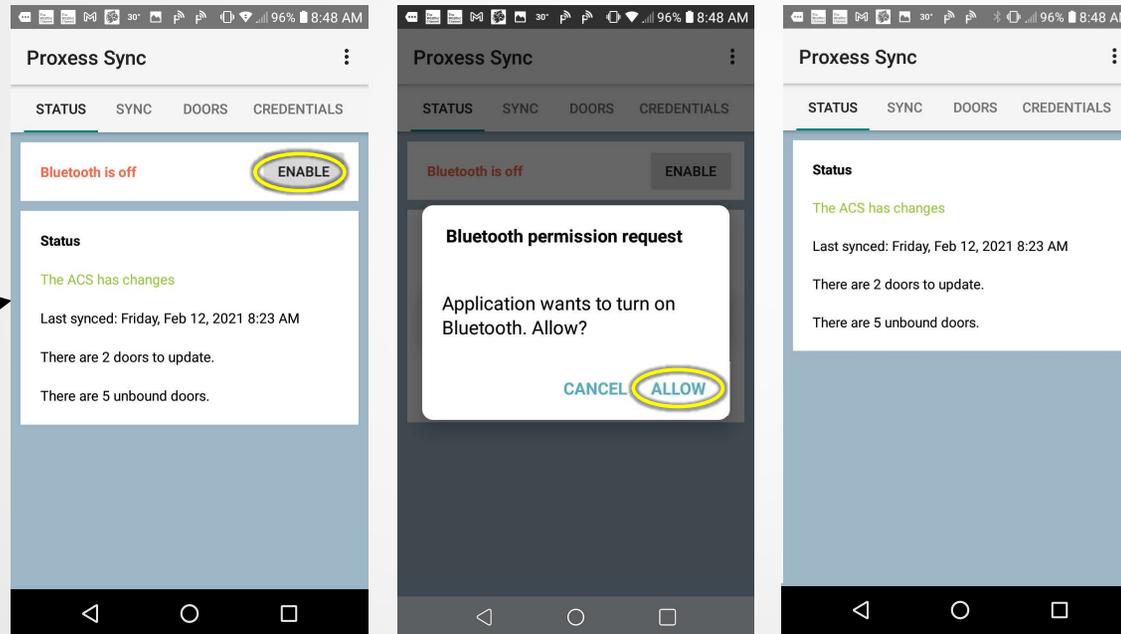
MOBILE PHONE APP: UPDATING the LOCKSET

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



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

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

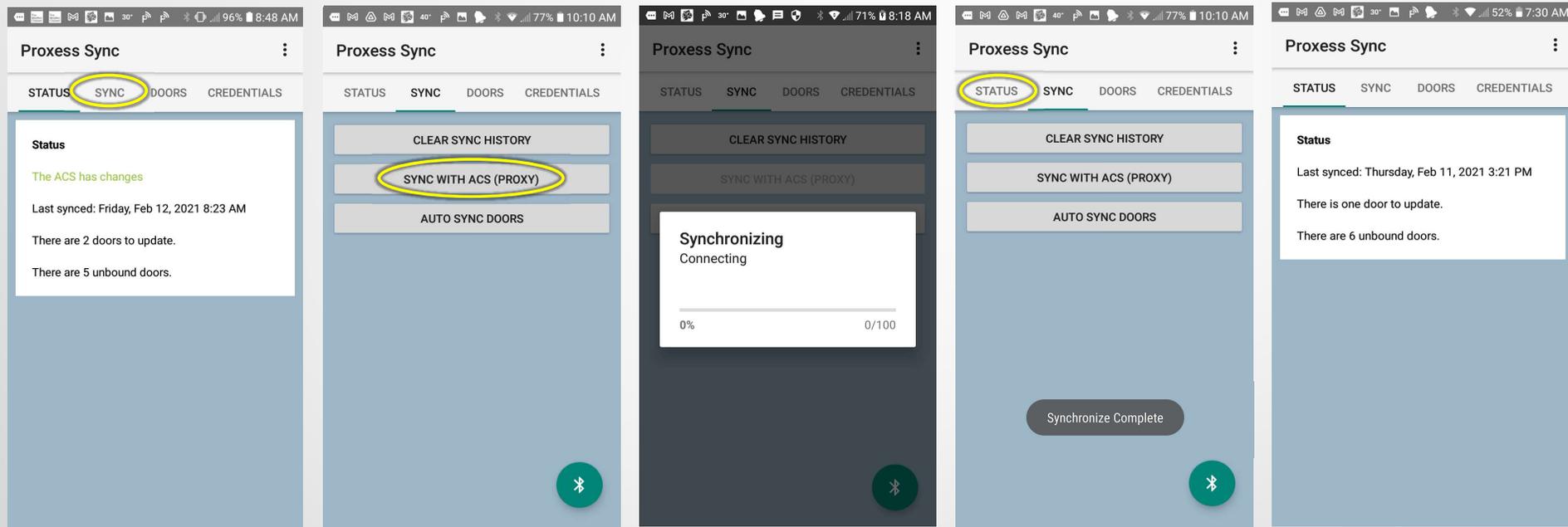


To use the Proxess Sync™ App to update locksets and gather their audit trail data to send to the ProxessIQ™ software, open the App and click on "Status" in the top menu. If Bluetooth on your phone is off, click "Enable" to turn it on or the phone will not be able to communicate with the locksets and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

NOTE: Before you will be able to proceed, it is also necessary to verify the phone has connectivity to the ProxessIQ™ software wherever it is located, via either the customer's WiFi or the mobile phone network. These are matters for resolution between the customer and the integrator and are not the responsibility of Proxess.



Sync with the Access Control System

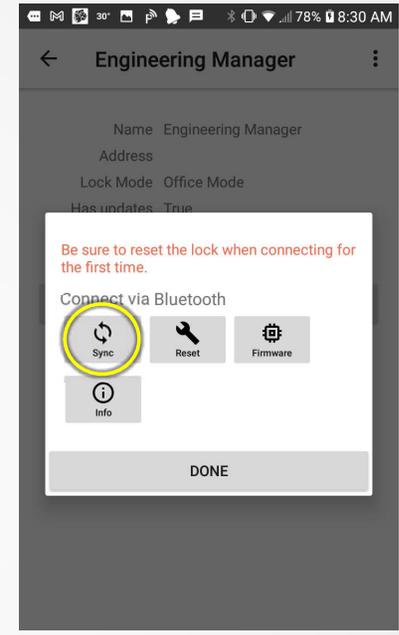
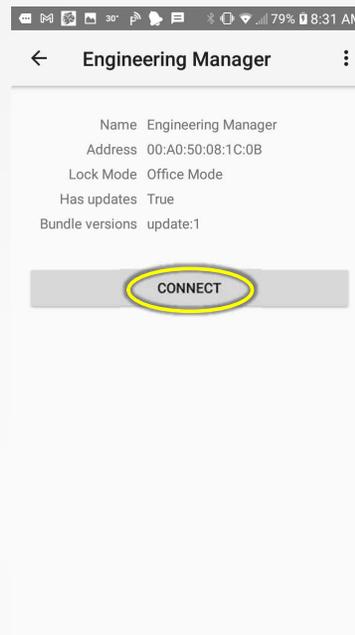
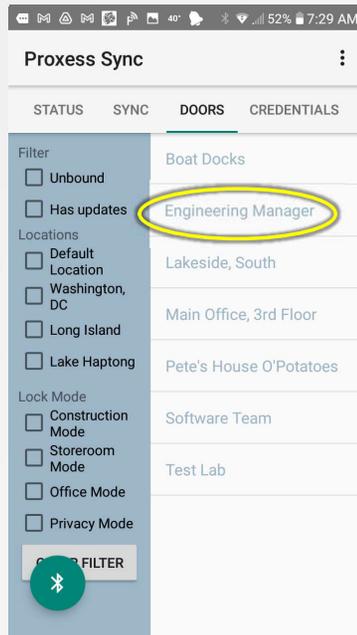


To perform any desired updates on the locksets, updates first need to be delivered to this phone. At this point, the phone does not need to be near any lockset. Click "Sync" from the top menu. The second screen above appears. Click "Sync with ACS" and the status bar will update you with progress and a note when the synchronization is complete.

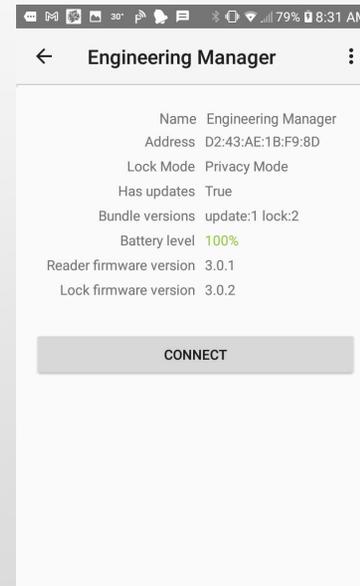
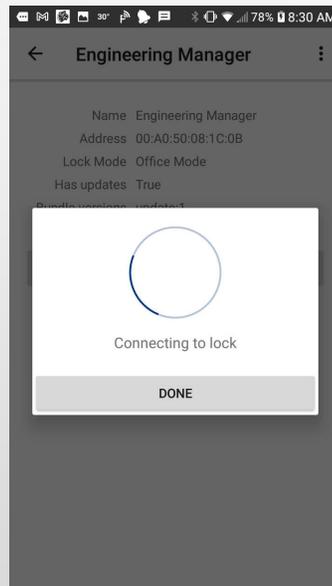
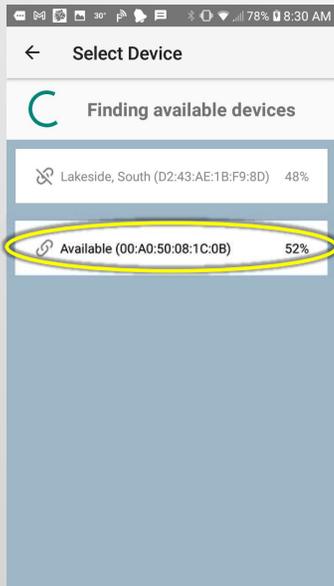
Must Initialize a Lockset Prior to First Synchronization



Using Proxess Sync™ - Updating Locksets - 3



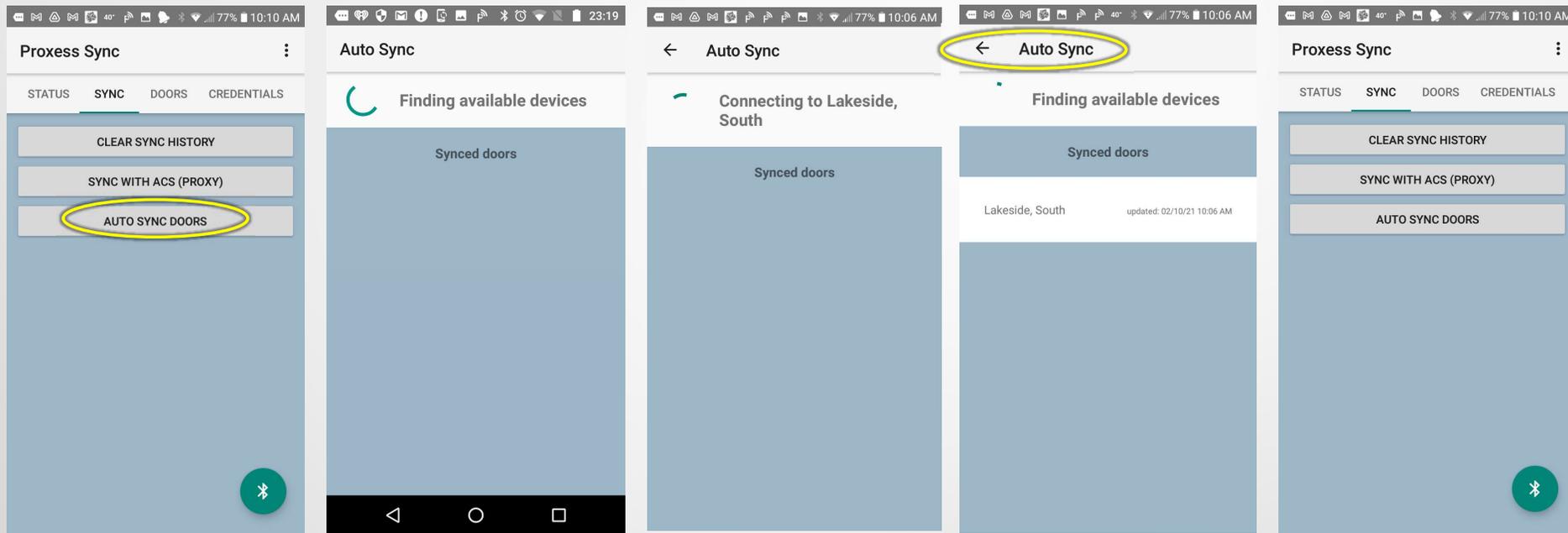
To initialize a lockset click on "Doors" from the top menu. To see the door you are looking for, check the box for the location your lockset resides in. That list of doors will appear. Click on the lockset name to be initialized and the menu for that door will appear. Click on "Connect" and then "Sync" 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



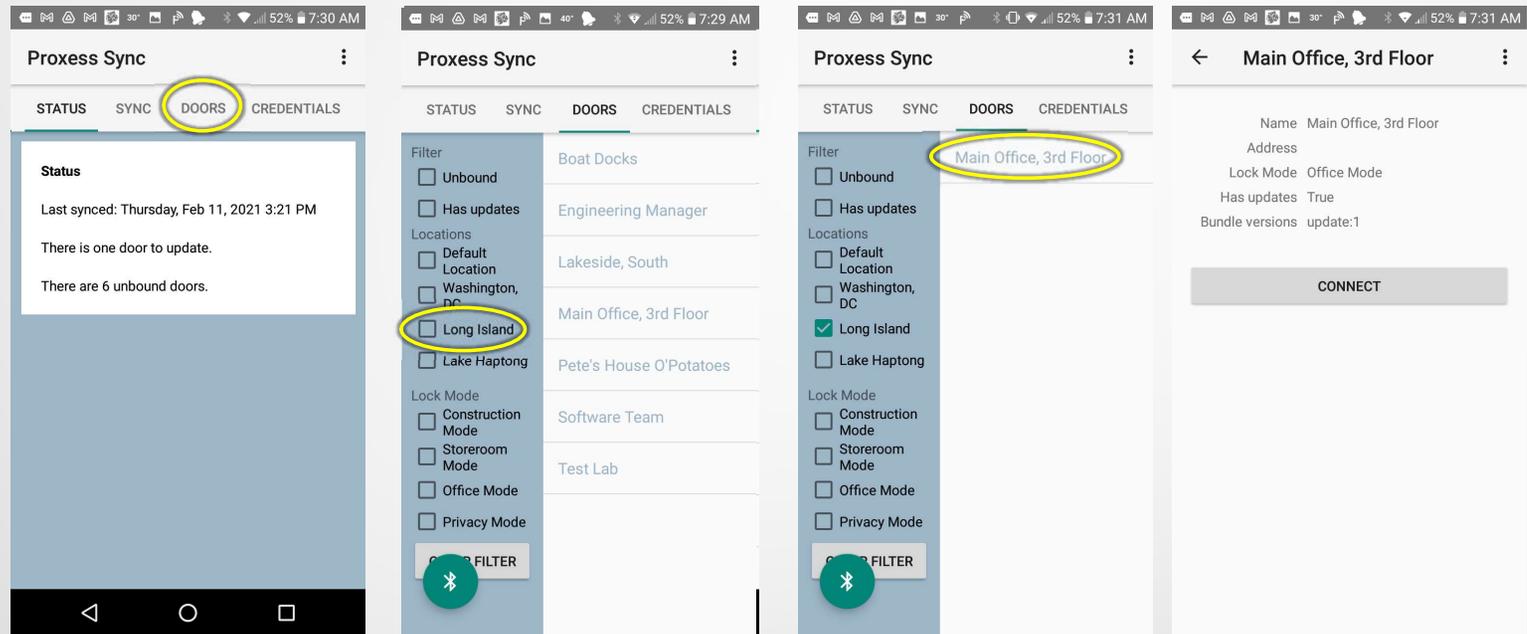
Once the ACS sync is complete and you are ready to update the locksets, click "Auto Sync Doors" and proceed to the first door to be updated. The 2nd (second) image will be shown as the App begins looking for locksets. The App will automatically begin the handshake, verification and update process when the 3rd 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™ 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)

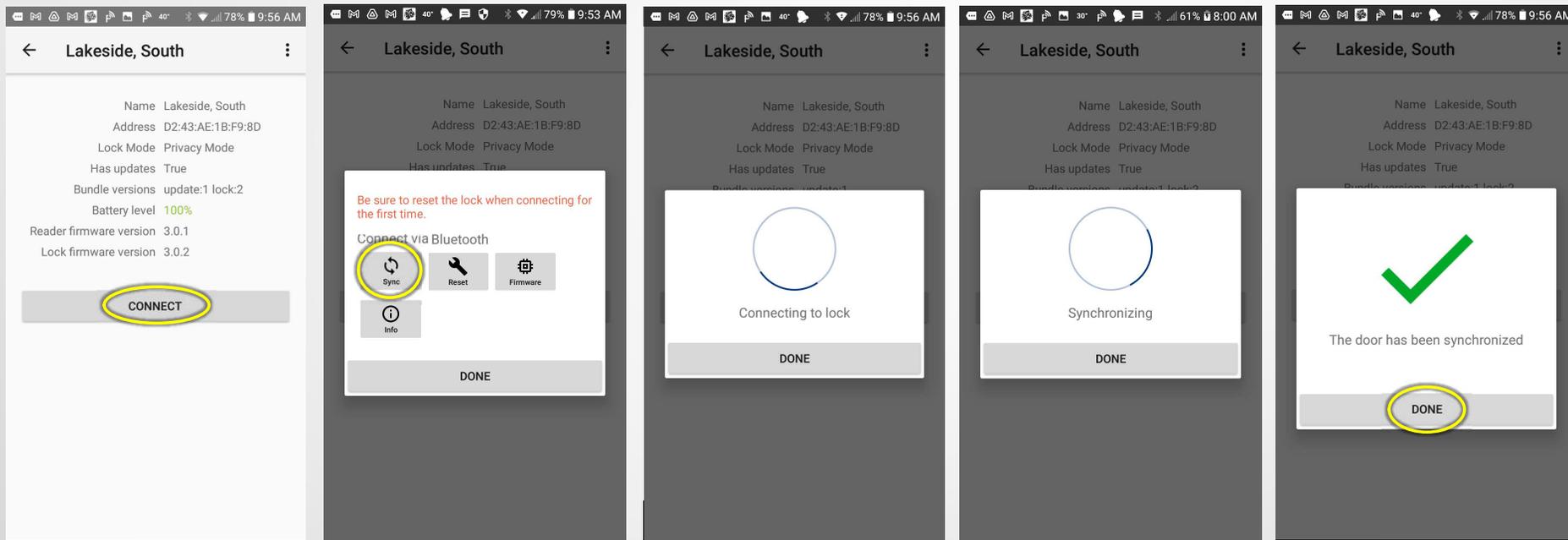


To manually perform any desired update on one specific lockset at a time, follow the instructions to "Sync with ACS" from the beginning of this section.

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.



Manually Sync with a Specific Lockset (2 of 2)



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”.

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



MOBILE PHONE APP

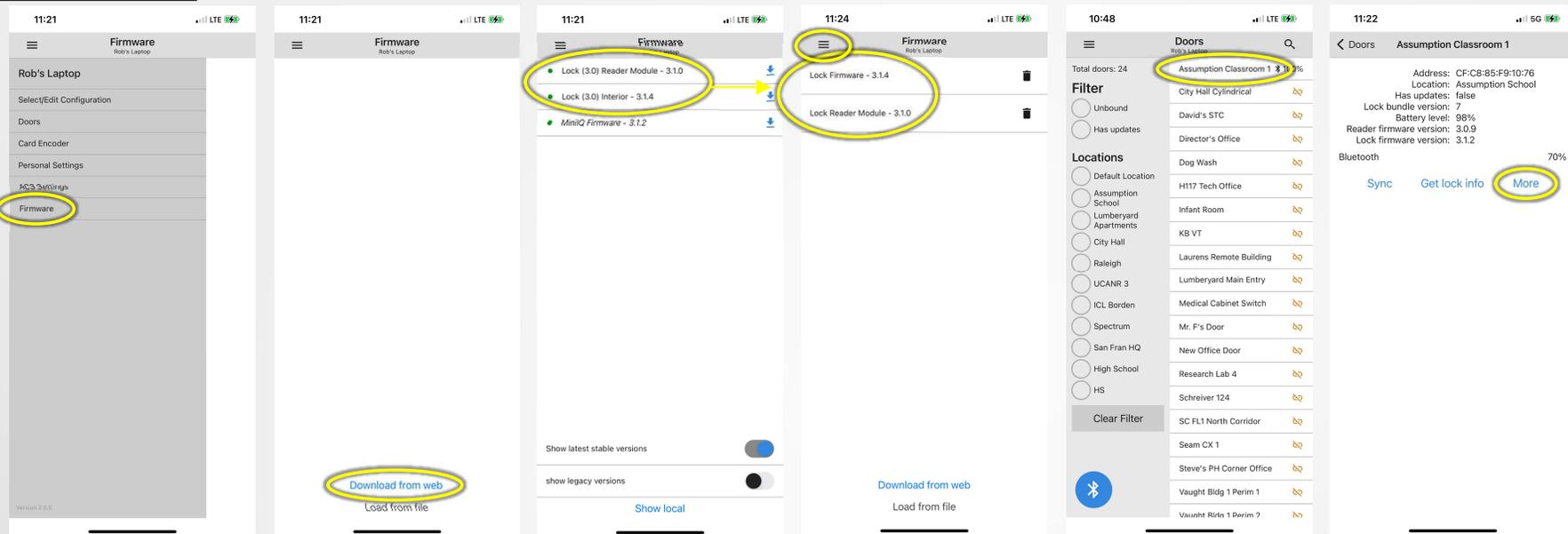
LOCKSET SETTINGS, FIRMWARE UPDATES & LOGS

For both Apple & Android phones



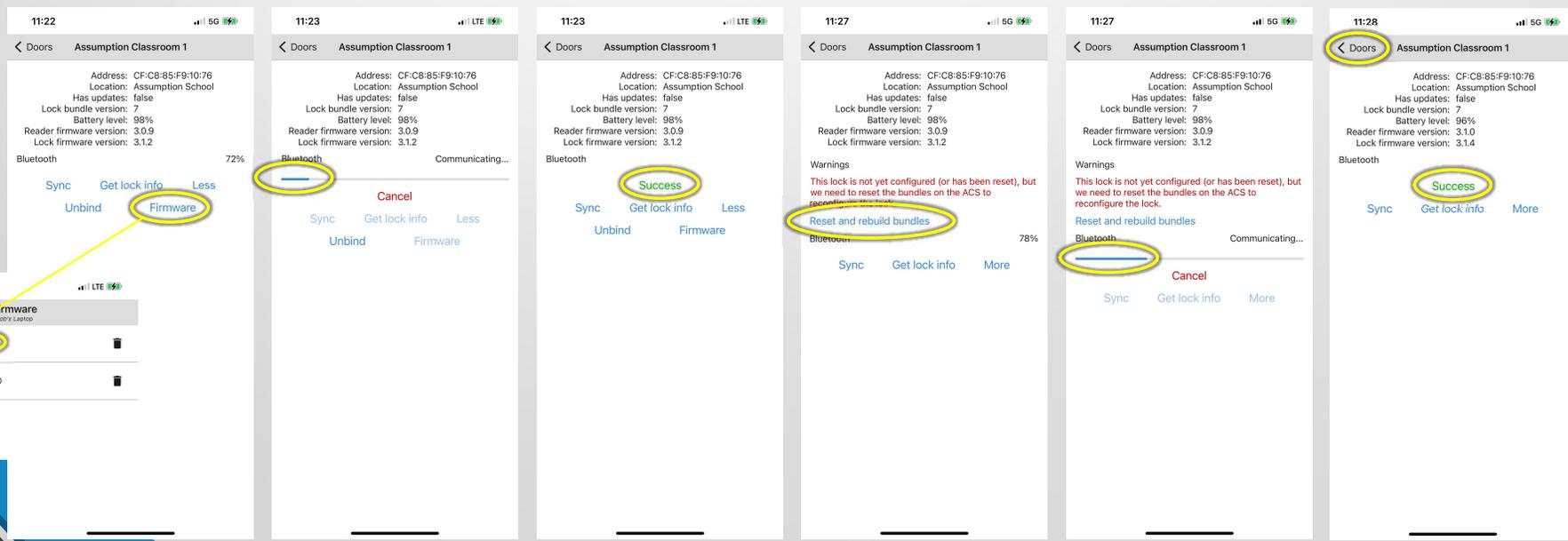
iPhone

Firmware Updates for Locks, Readers & Controllers



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.

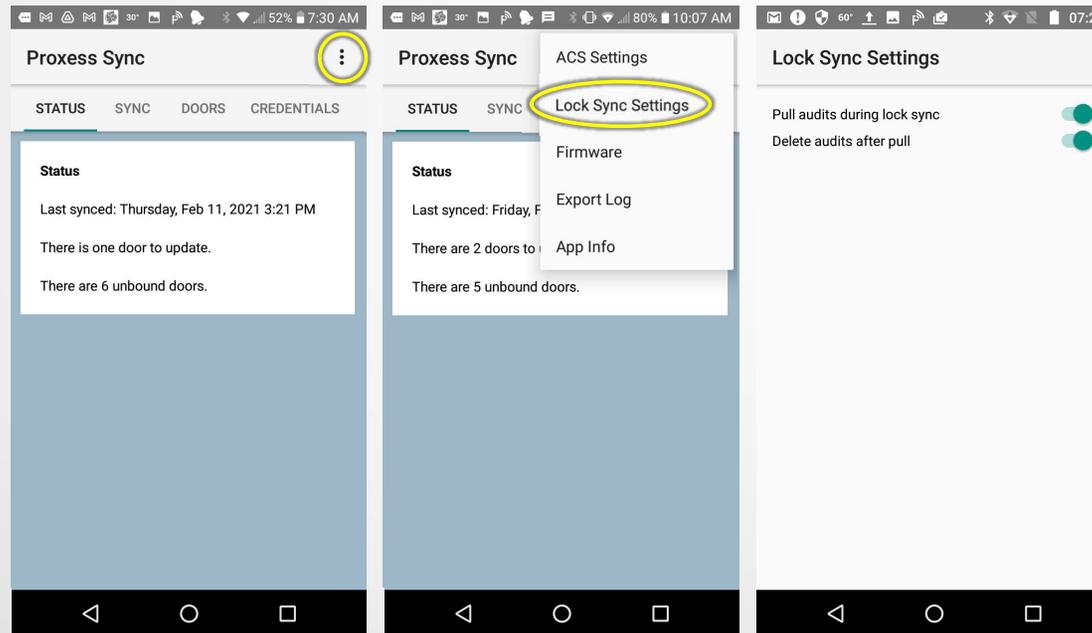
Finally, click "Reset and rebuild bundles" and watch the reset progress. The lock will be Reset and is upgraded. Go back to the Doors screen.





Android

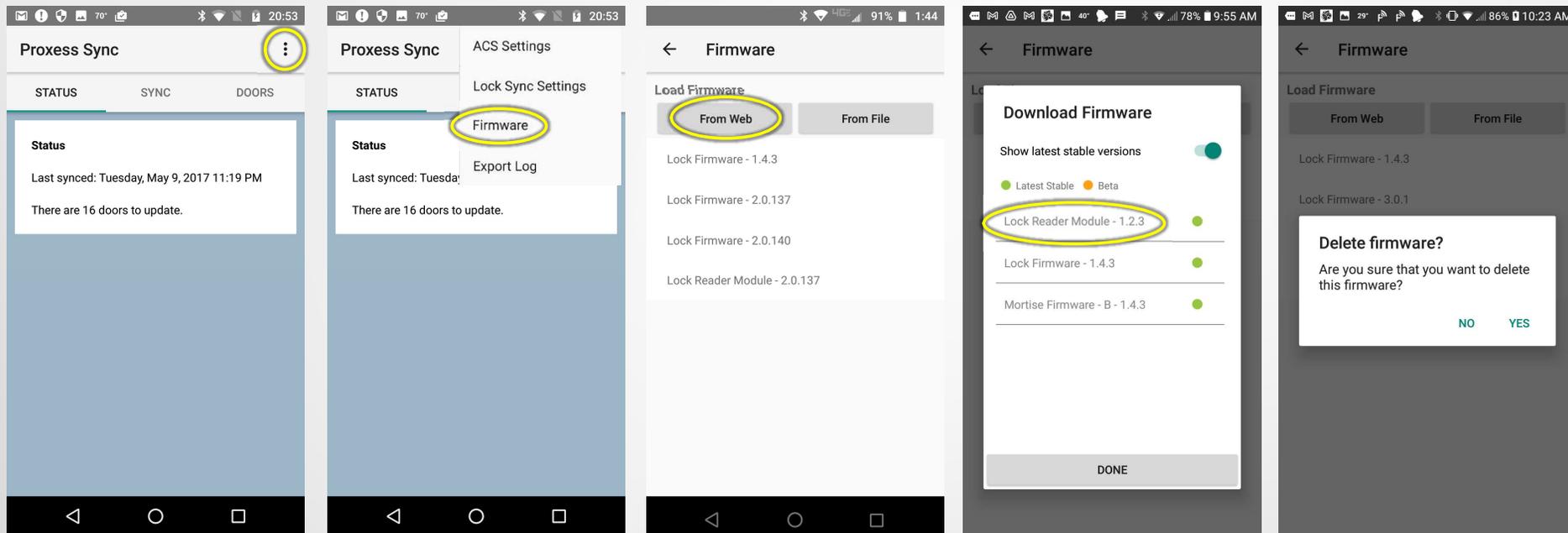
Sync Settings



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



Lockset Firmware Uploading (Preparation)



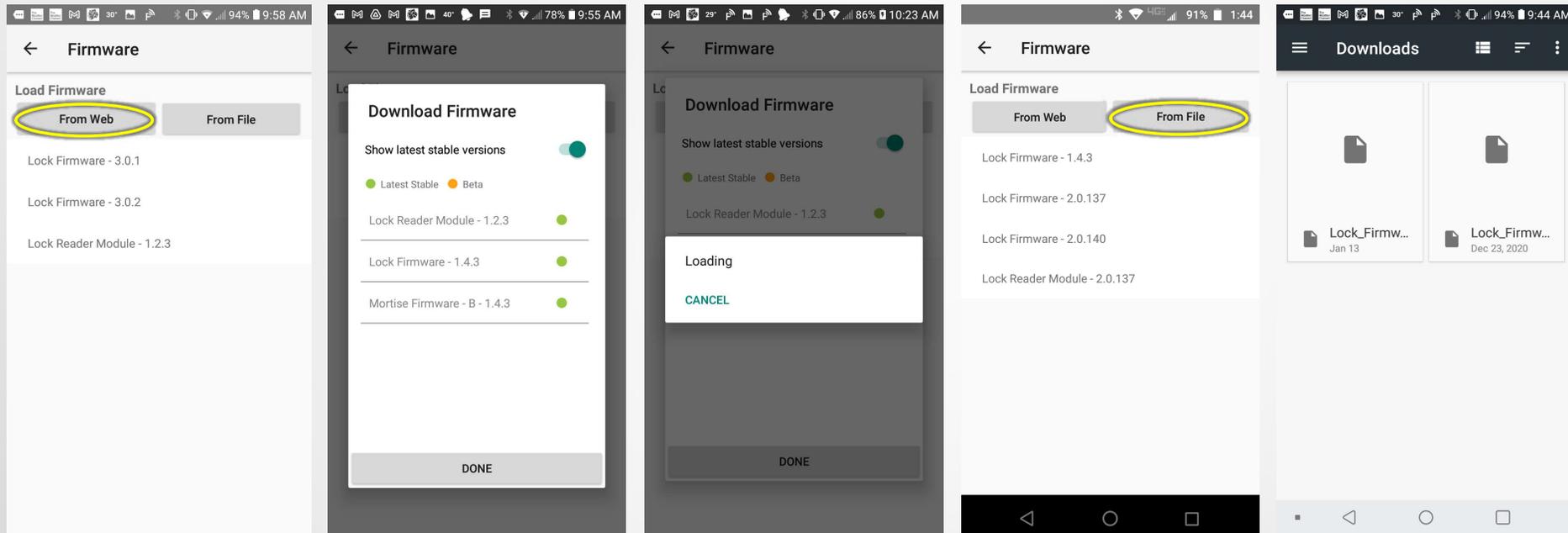
There are two (2) sets of firmware on each lockset, one for controller operations and one for the reader PC board.

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.



Lockset Firmware Downloading – From Web & Device

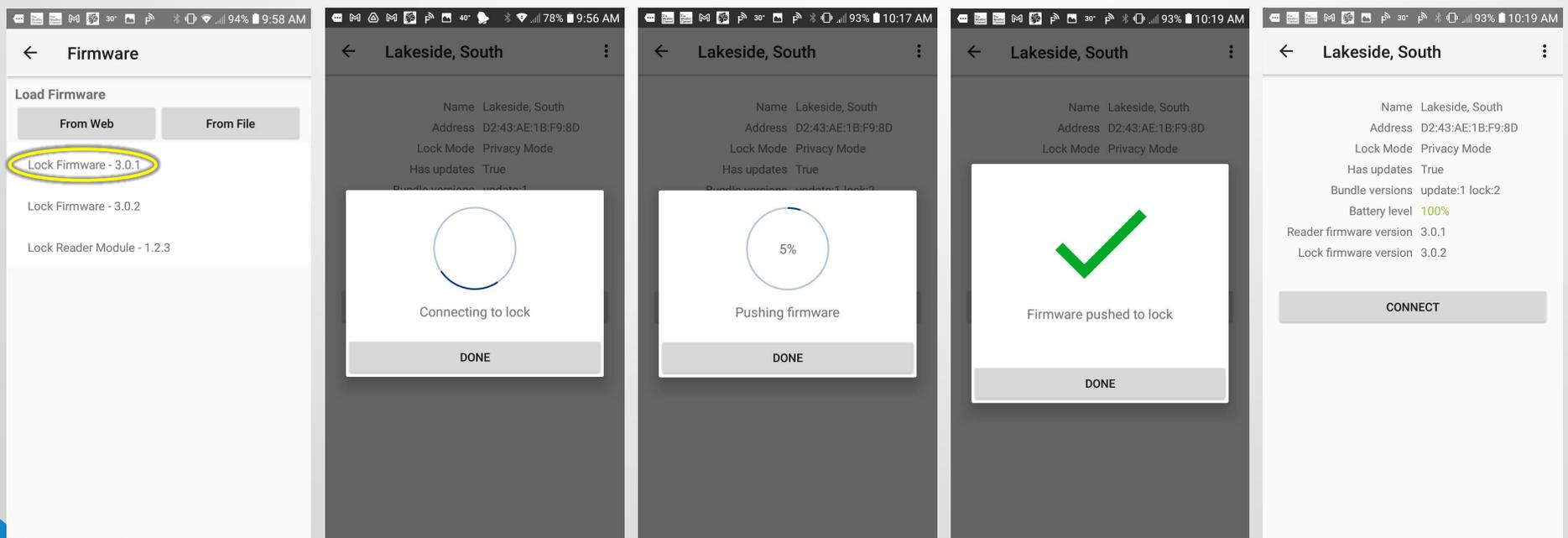
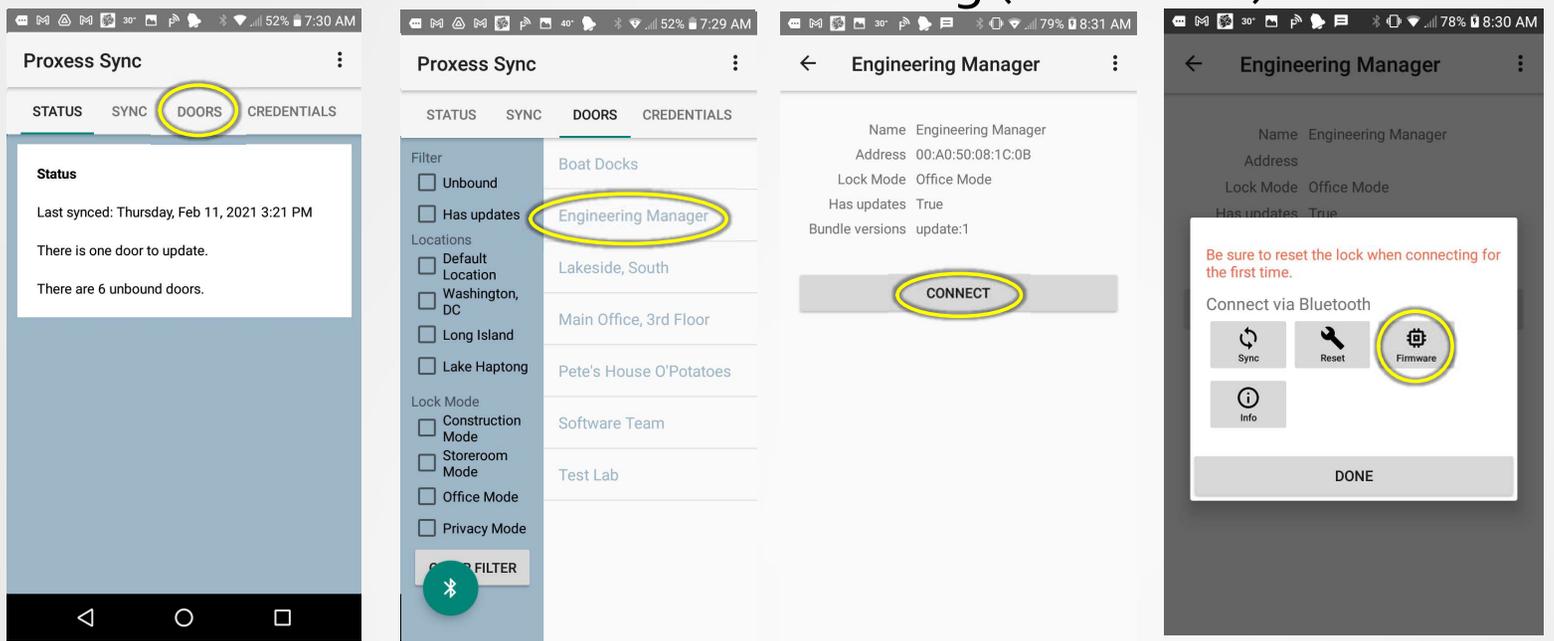


On the Settings-Firmware page, you may load firmware onto (the proper folder in) your device from either the Proxess website, or your device. To load firmware from the Proxess website, just tap “From Web” and the available firmware (that is Not already on your device) will be listed. If allowed, you 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.



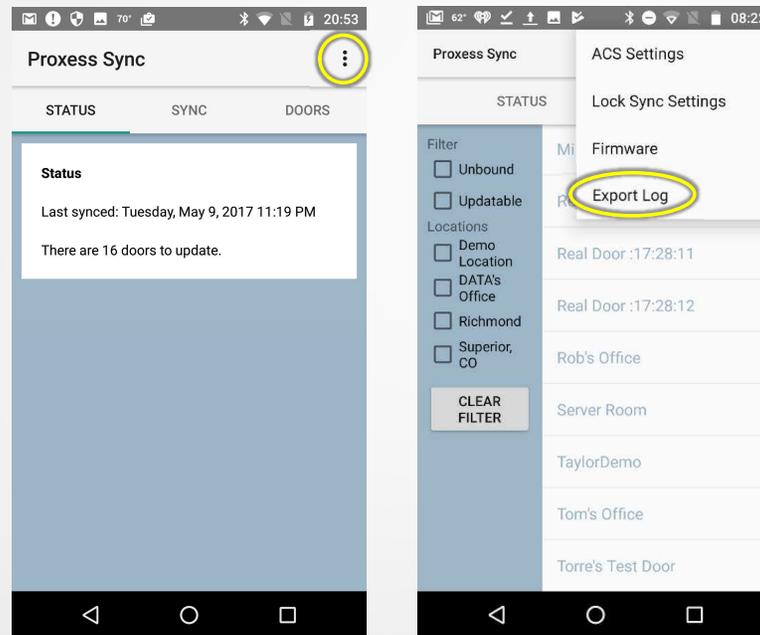
Lockset Firmware Downloading (Execution)



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 re-synch'd using this app to work with the credentials programmed into this system.



Proxess Sync App Message Log Export



For advanced diagnostics, usually upon request from the Proxess Technical Support team, the Proxess Sync™ App maintains a support message log, which can be exported and emailed to Tech Support.

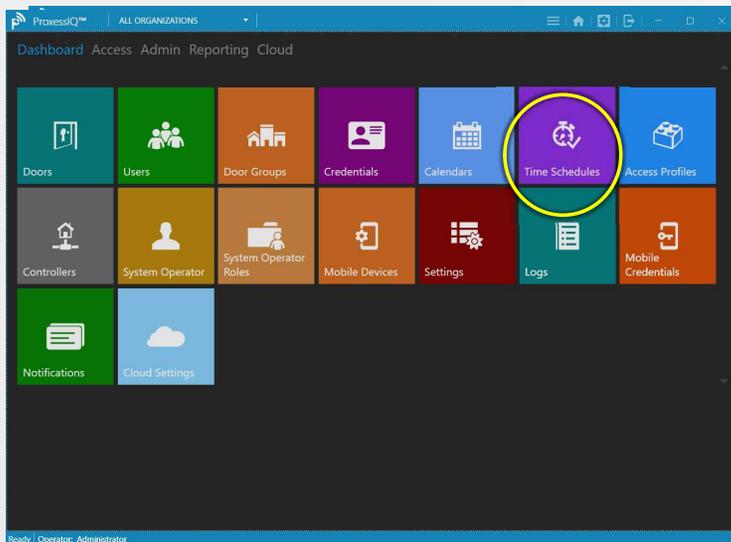
From the Home Screen of the App, click on the icon above and then click on "Export Log" from the resulting menu. Email the file that is downloaded into the phone's file directory.



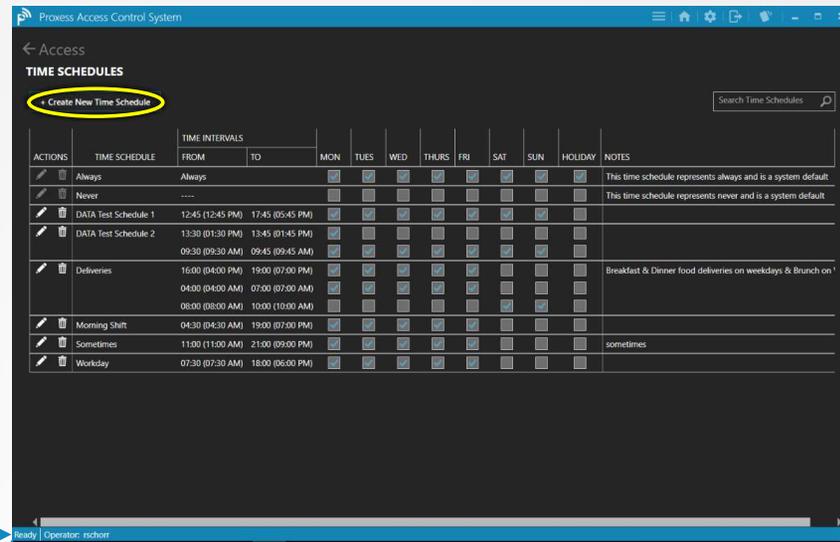
TIME SCHEDULES



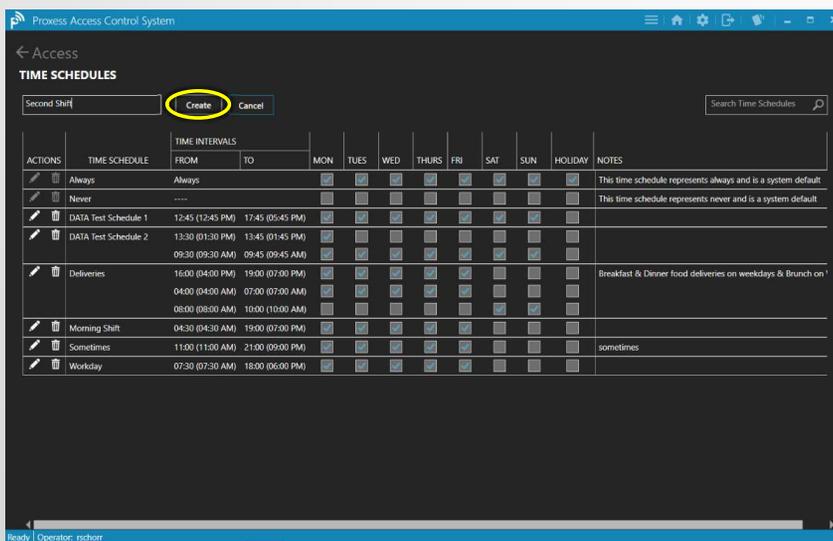
Time Schedules - 1



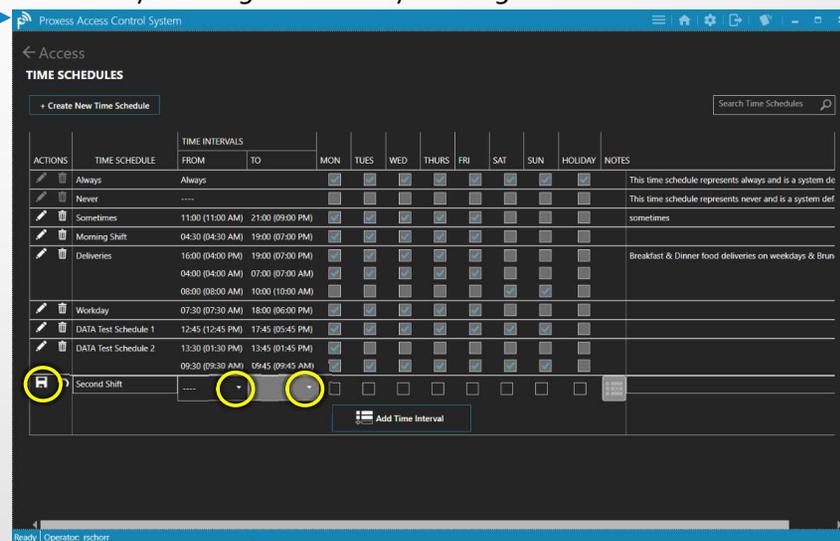
From the Home screen \ Dashboard, click "Time Schedules".



Click "Create New Time Schedule". You may use the Search box in the top right to find specific Time Schedule names if the list is longer than what is seen in the current view. You may edit or delete any existing schedule by clicking on its icon on the left side.



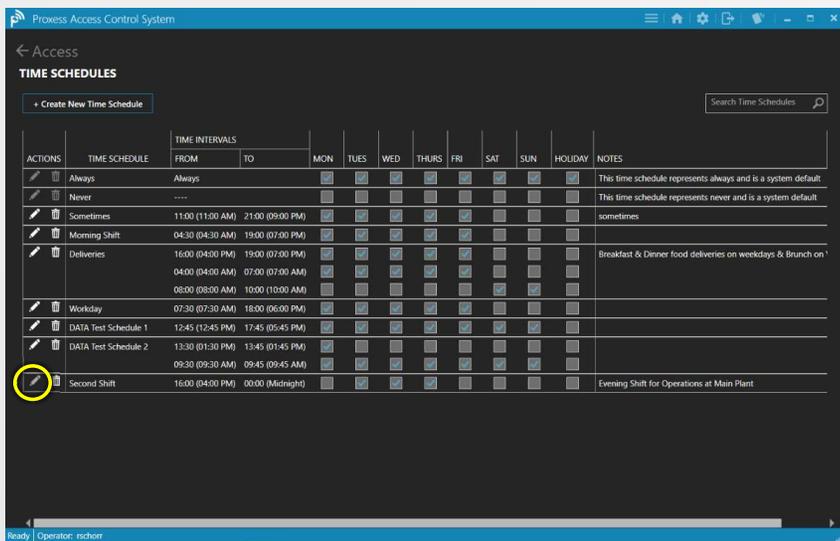
Type in a name for the new Time Schedule and click "Create".



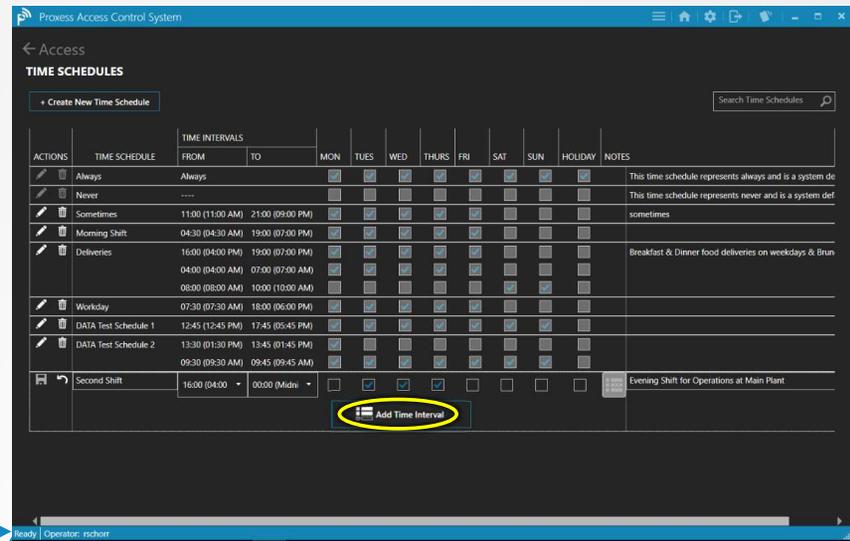
The new Time Schedule will appear at the bottom of the list. To select the overall time for it click the dropdown buttons for both the "From" and "To" columns. Select the days of the week in which this will be in effect and whether it will apply during Holidays. Optionally, add a note to describe the use of this schedule. Click the "Save" icon on the left side of the screen.



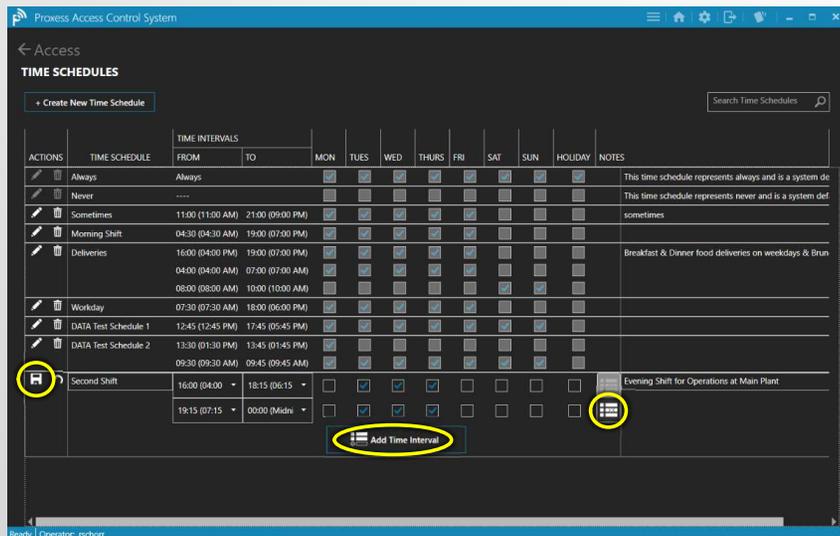
Time Schedules - 2



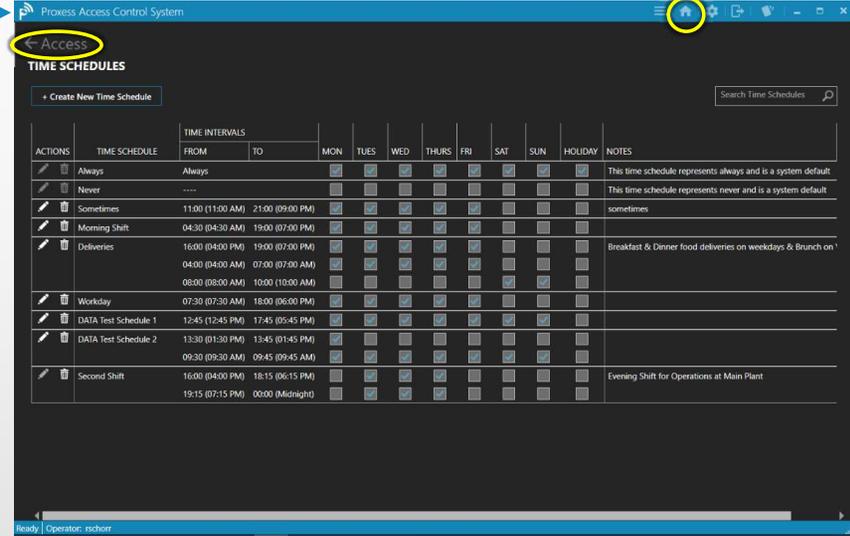
To make changes, or to add Time Intervals, click the Edit icon.



Click the "Add Time Interval" icon.



Add the second Time Interval and adjust the overall interval you previously entered. This could be used for a lunch period, for instance. In this case, the cards would grant access in the working areas during these intervals, but would deny access during the gaps between the intervals. Click the Save icon on the left, the Delete Interval icon on the right, or the Add Time Interval button.



This is the screen you will see if you clicked Save. To return to the Home Screen \ Dashboard, click either "Access" or the Home icon in the top taskbar.

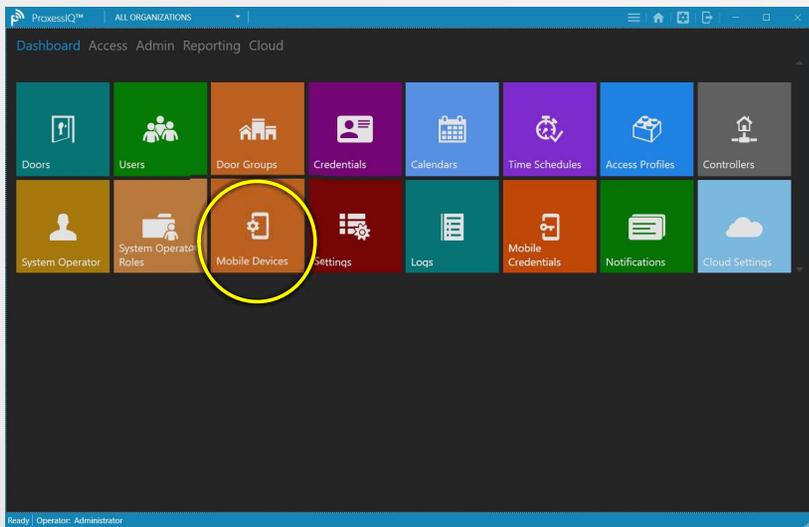


DOOR GROUPS

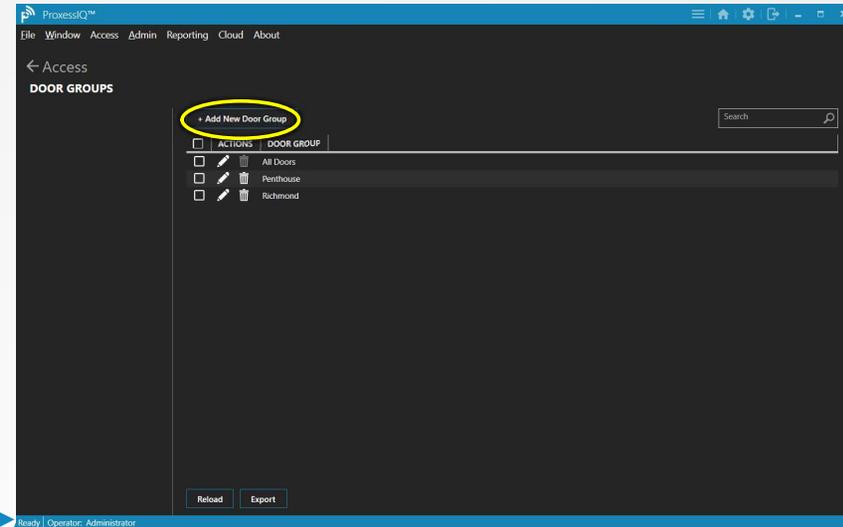
Before proceeding to create Door Groups, please review our online tutorial, which will greatly simplify your data entry and ongoing maintenance:

www.proxess.com/Proxess/media/Proxess/Documents/ProxessIQ-Manual-without-Hidden-Slides_3.pdf?ext=.pdf

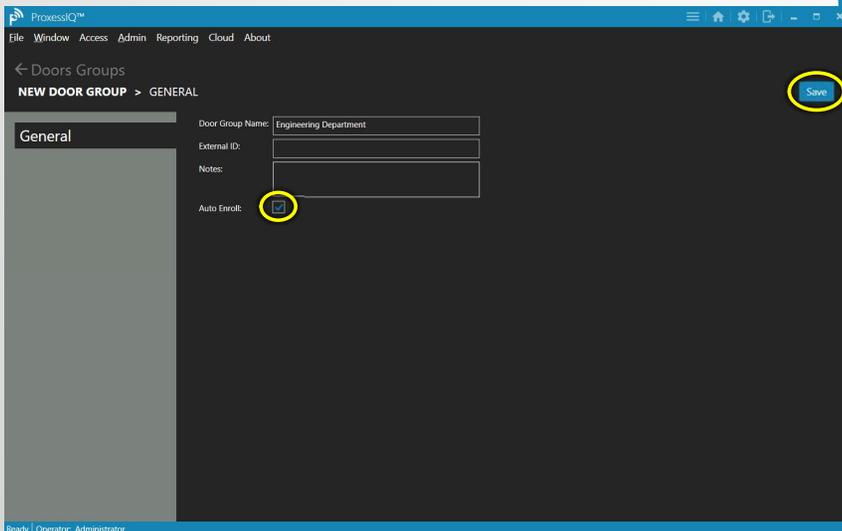
Adding & Editing Door Groups - 1



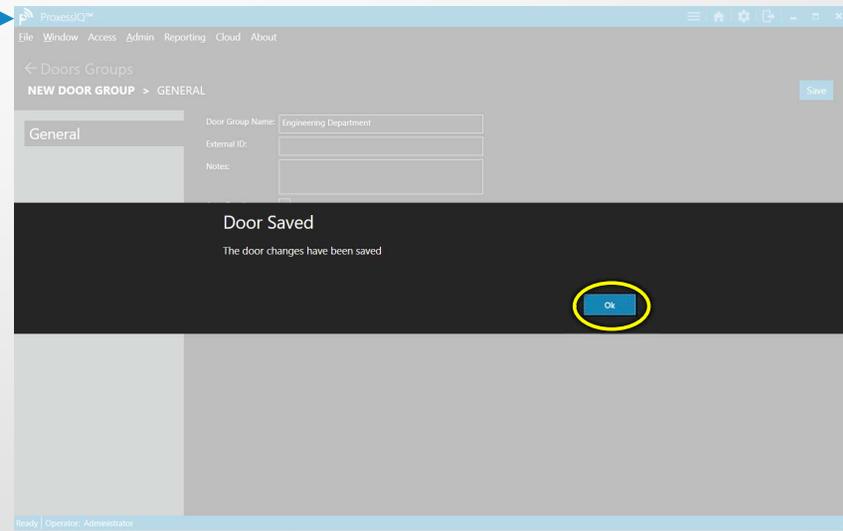
From the Home screen \ Dashboard, click "Door Groups". Before adding Door Groups, consider adding any custom Time Schedule and Access Profiles you desire.



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.



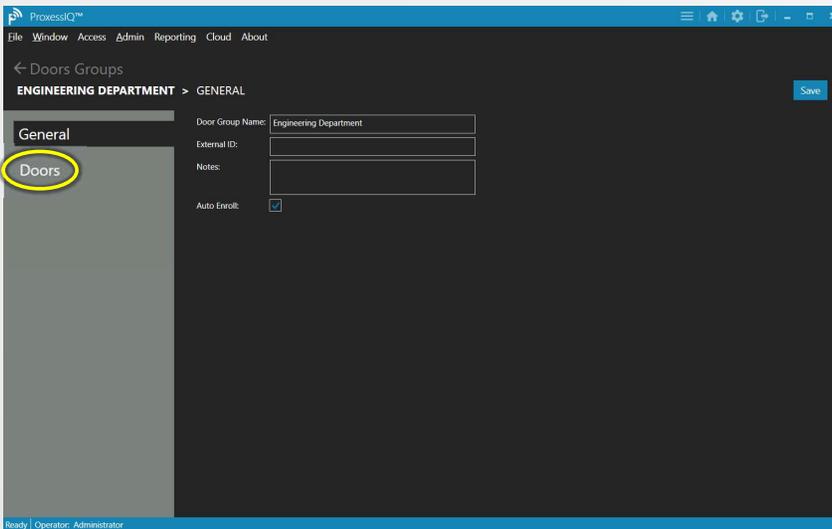
Enter the name for the new Door Group. "External ID" and "Notes" are not mandatory and are just for the administrator's reference. Checking the "Auto Enroll" box will cause all future doors that are added into the software to be enrolled into this Door Group. Click "Save" to do so.



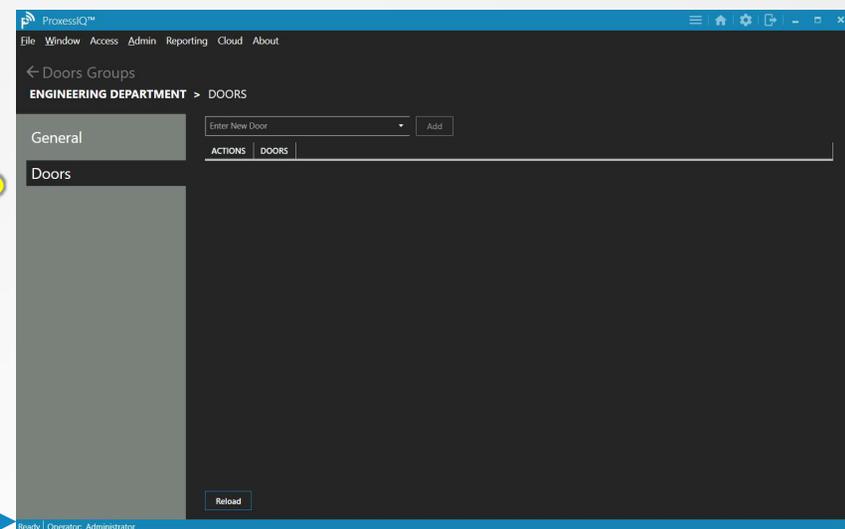
Click on "OK".



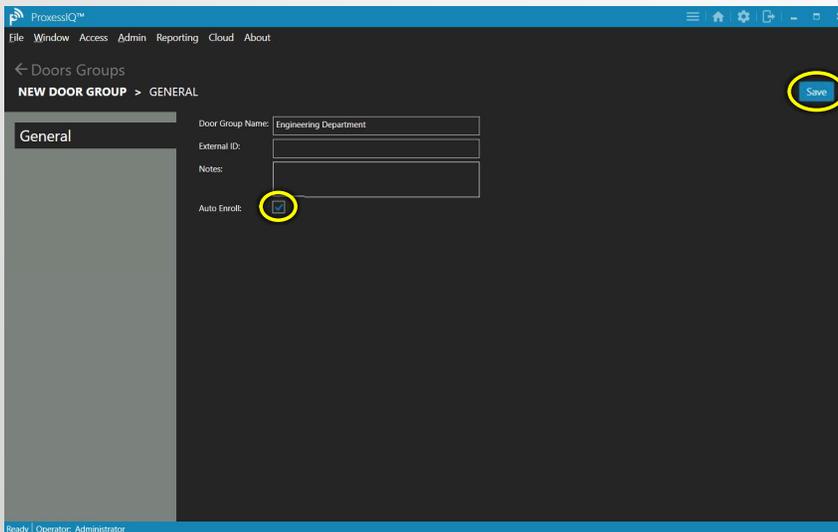
Adding & Editing Door Groups - 2



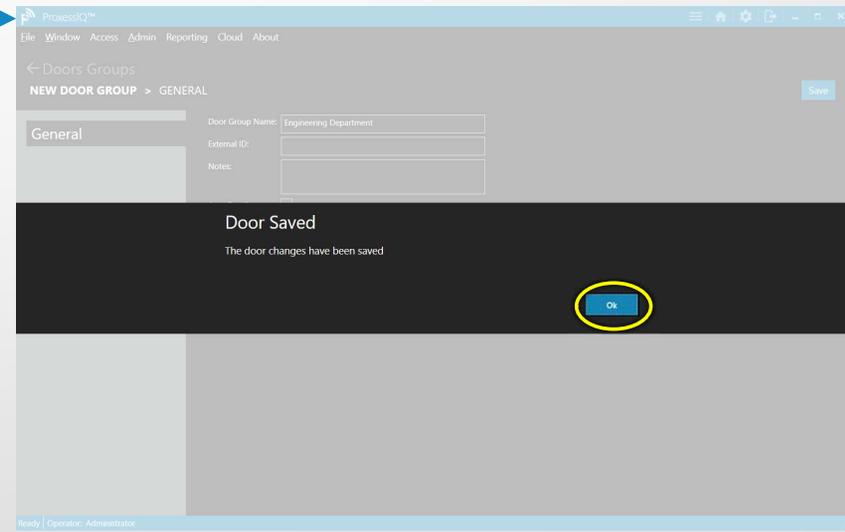
Click on the "Doors" tab to add the Doors that will become a part of this new group.



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.



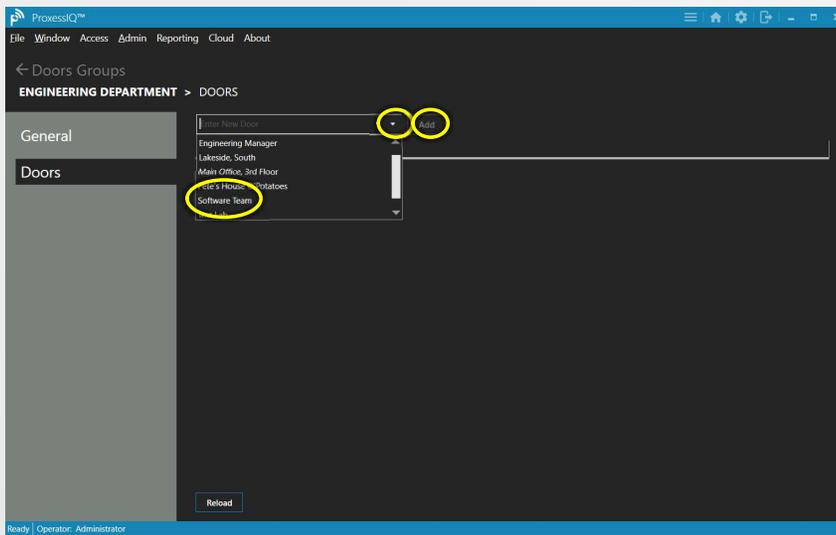
Enter the name for the new Door Group. "External ID" and "Notes" are not mandatory and are just for the administrator's reference. Checking the "Auto Enroll" box will cause all future doors that are added into the software to be enrolled into this Door Group. Click "Save" to do so.



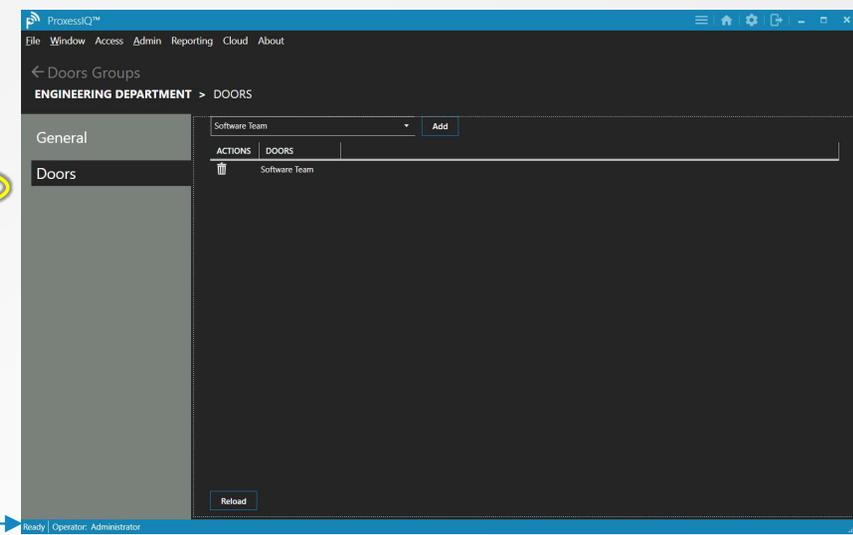
Click on "OK".



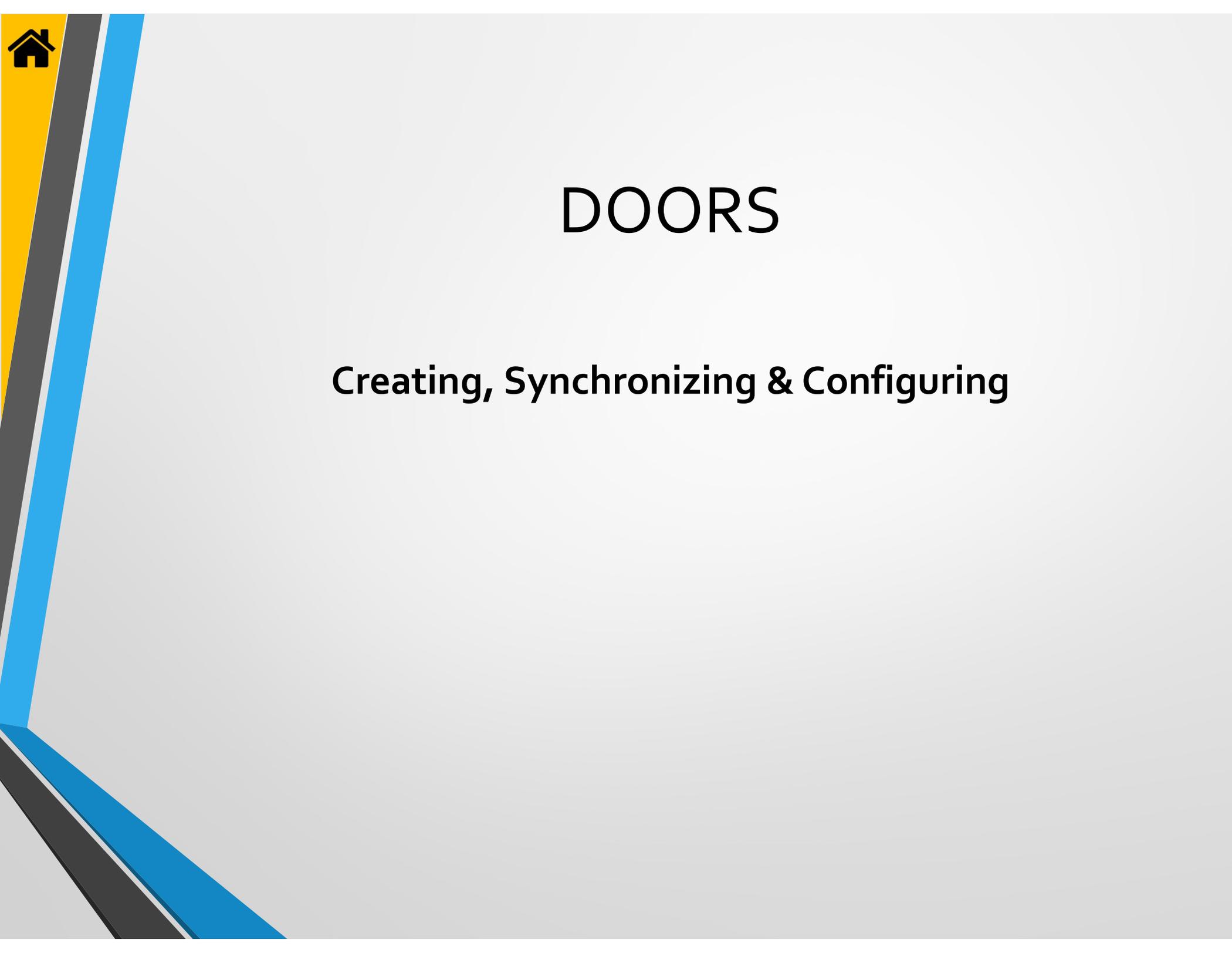
Adding & Editing Door Groups - 3



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.

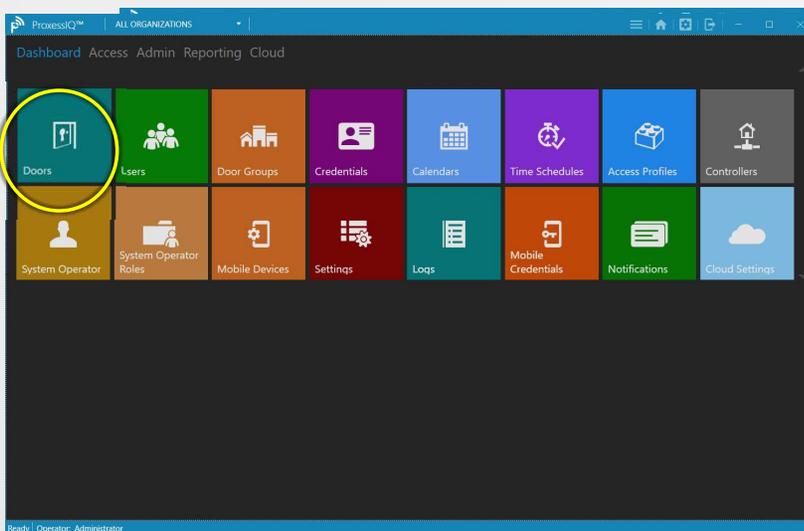


DOORS

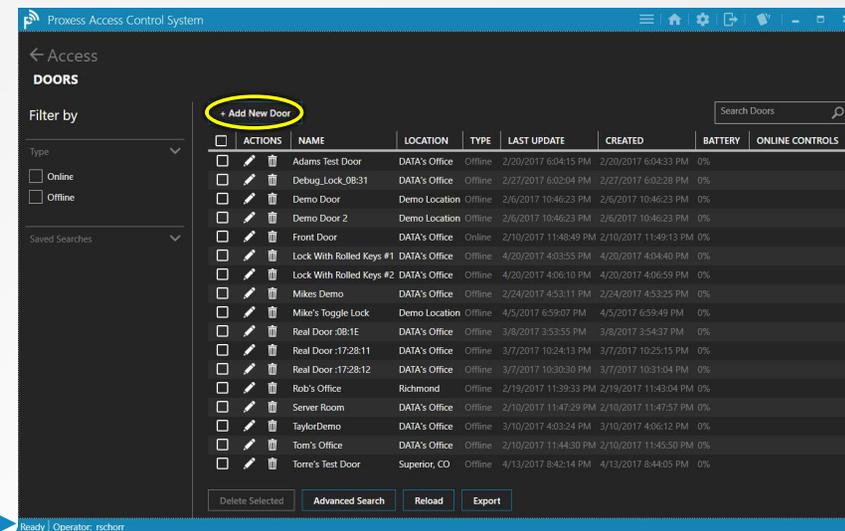
Creating, Synchronizing & Configuring



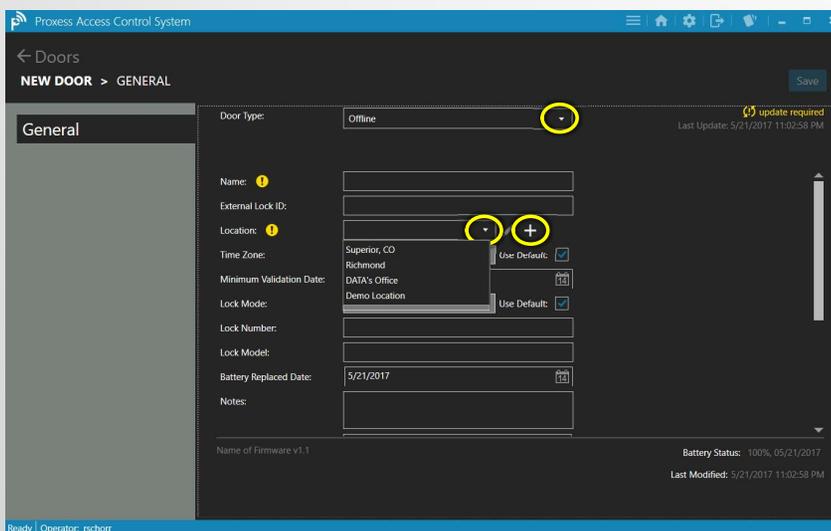
Adding & Editing Doors - 1



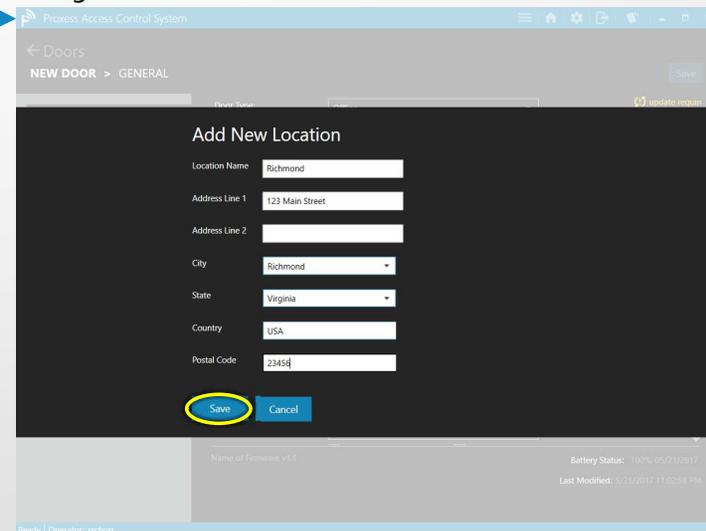
From the Home screen \ Dashboard, click "Doors". Before adding Doors, consider adding any custom Time Schedule and Access Profiles you desire.



Click "Add New Door" to do so. You may also use the Search box in the top right to find existing Door names, or Filter the list by "Online" or "Offline" types using the checkboxes on the left if the list is longer than what is seen in the current view. You may edit or delete any existing Door by clicking on its icon on the left side. We will go over Advanced Searches at the end of this section.



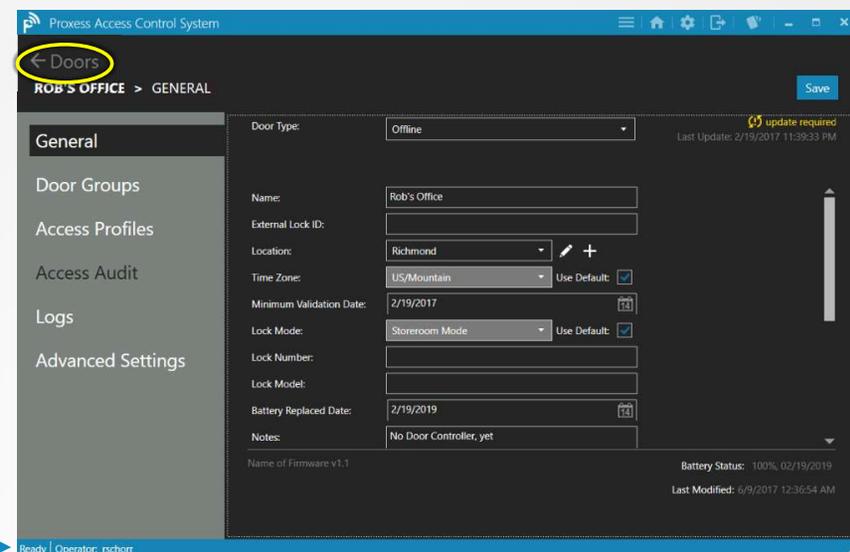
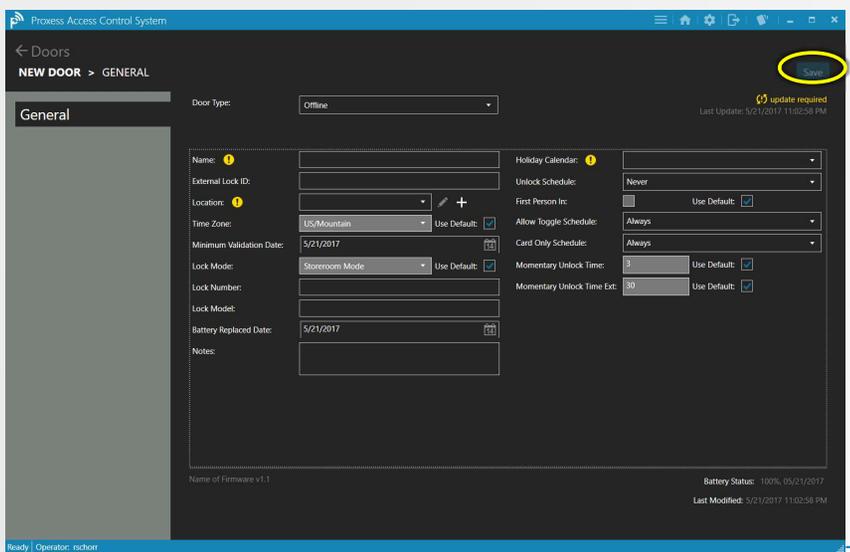
Select if the door will be online or offline. This selection will let the software know how to attempt to connect with this door for updates and on-demand commands. If you select "Online" you will need to add a Controller in a later section to connect it with. Type in a name for the new Door and select a location from the dropdown arrow as shown above. To create a New Location, click the "+" shown above.



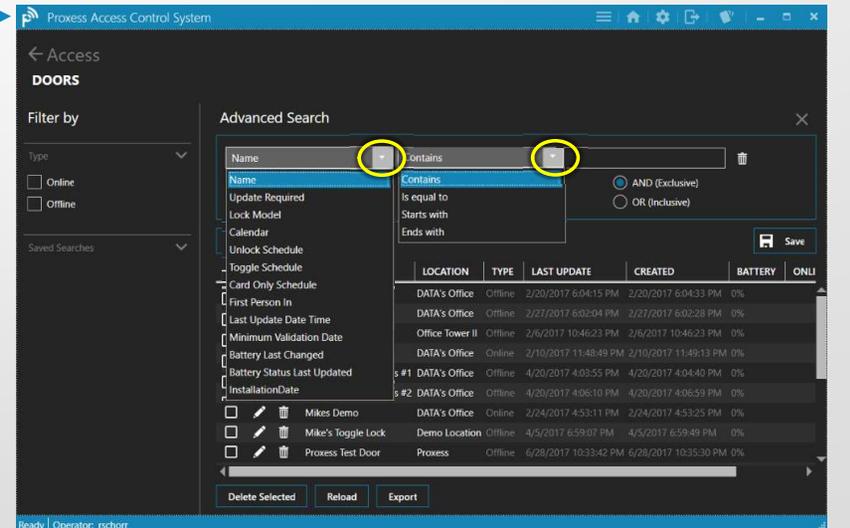
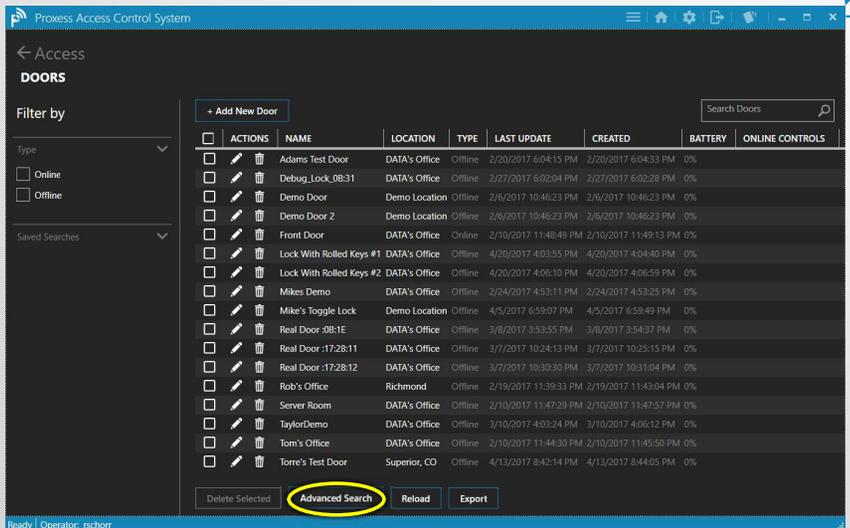
The "Add New Location" screen appears. Enter a "Name", and any other information you desire. Click the "Save" button to complete the action.



Adding & Editing Doors - 2



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



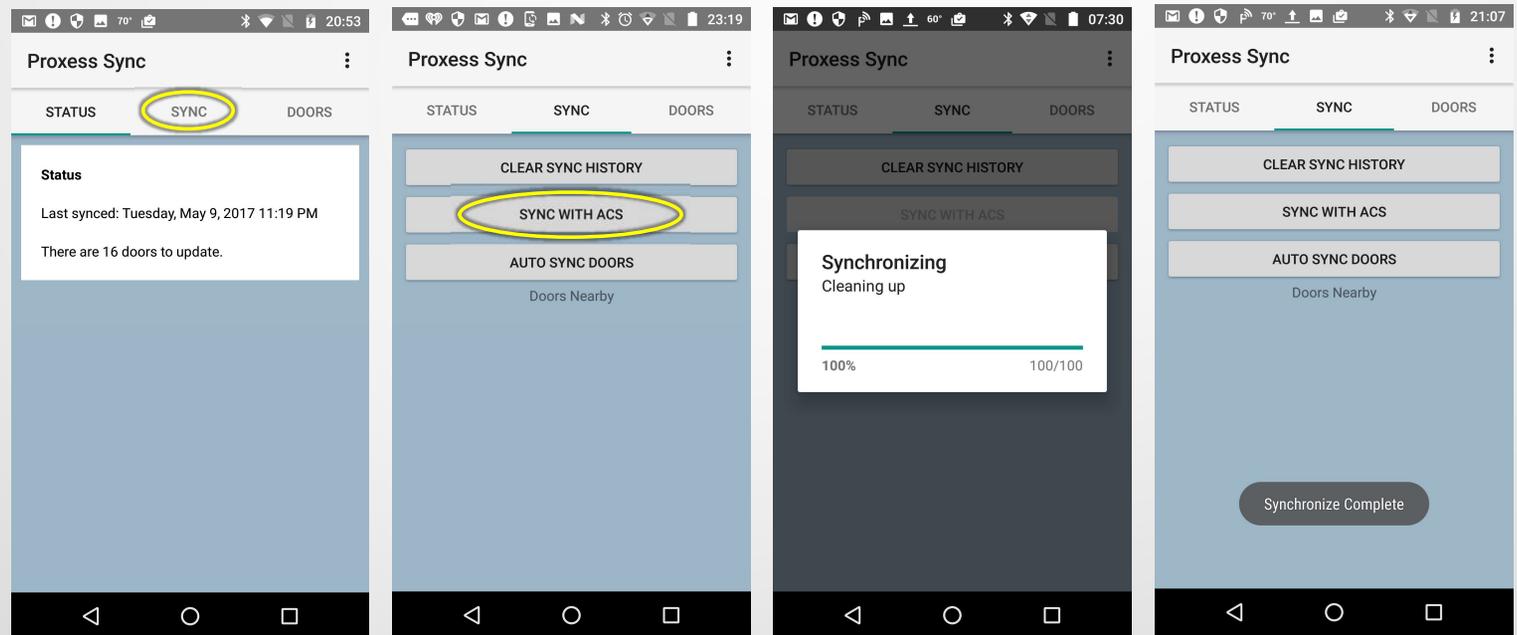
Click "Advanced Search".

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



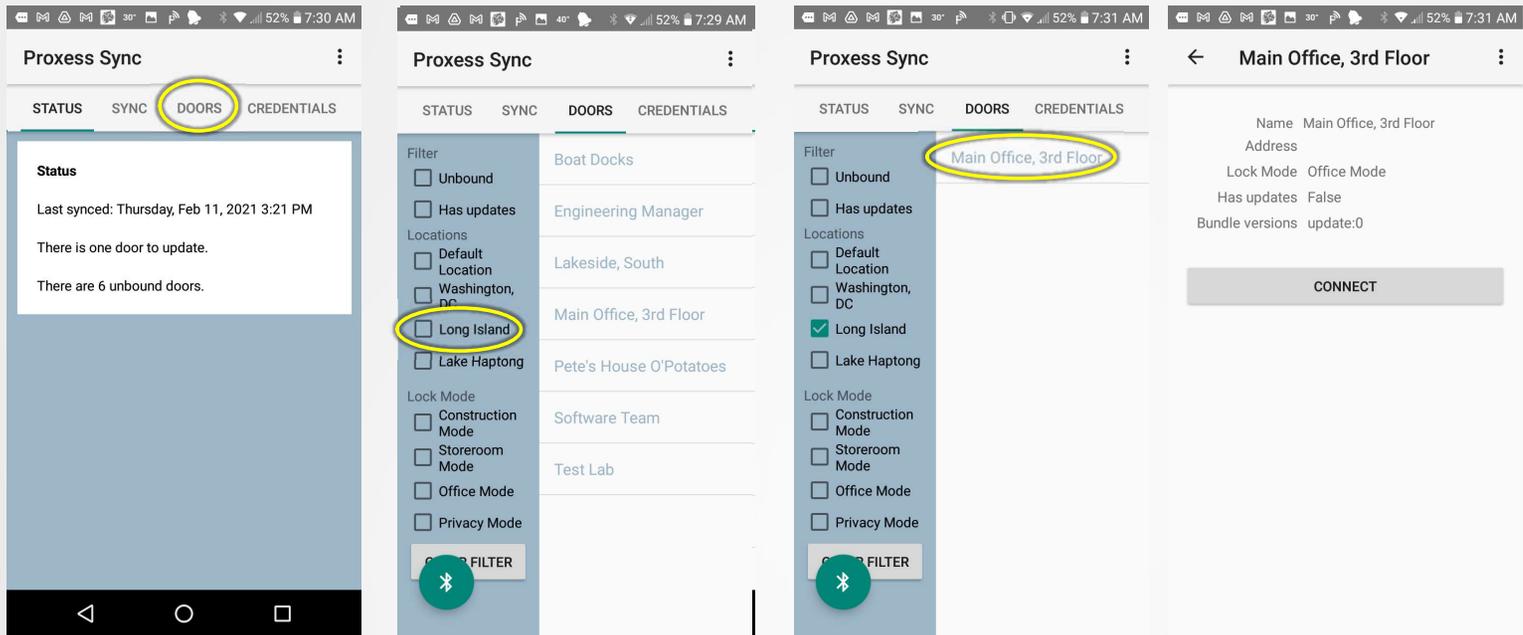
Initialize a Lockset (1 of 2)

NOTE: Once a new lockset Door has been created in the software, it **MUST** be initialized for operation using the Proxess Sync™ mobile App. **This initialization process is detailed here and it may be done at this step in the programming process, or anytime until you need the door to be in service.**

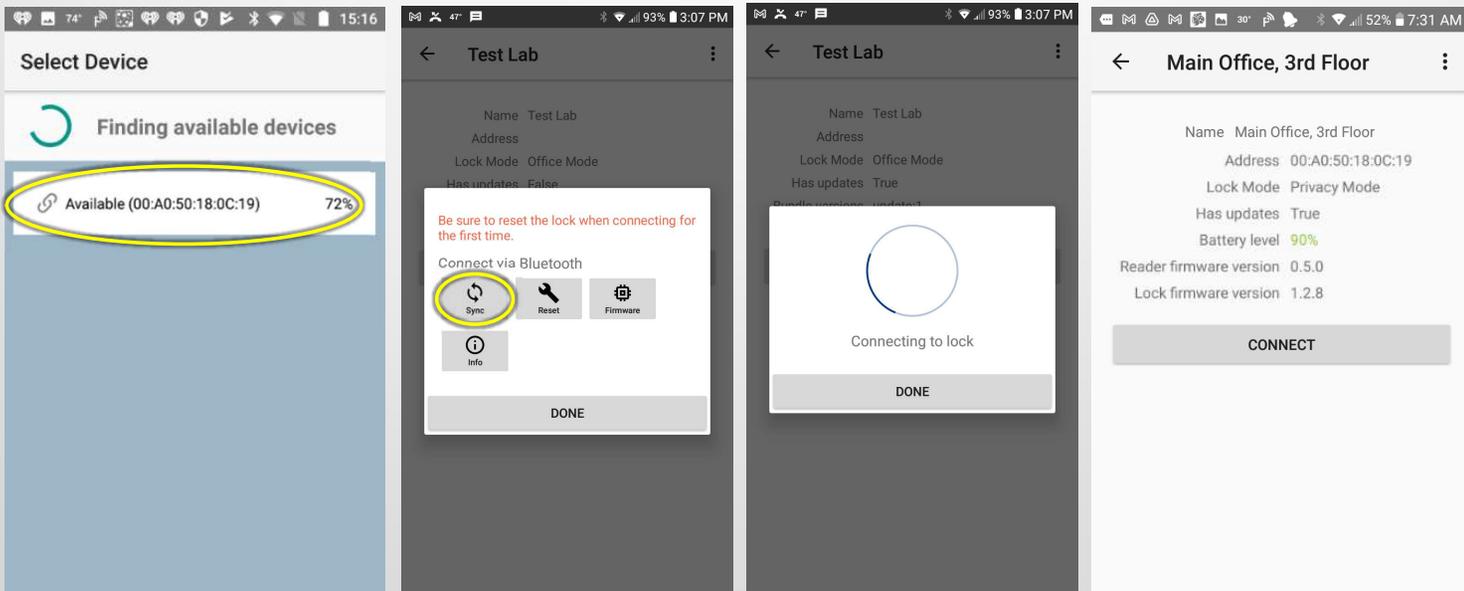


To perform any desired updates on the locksets, updates first need to be delivered to this phone. At this point, the phone does not need to be near any lockset. Open the Proxess Sync™ mobile App and click "Sync" from the top menu. The second screen above appears. Click "Sync with ACS" and the status bar will update you with progress and a note when the synchronization is complete.

Initialize a Lockset (2 of 2)



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".

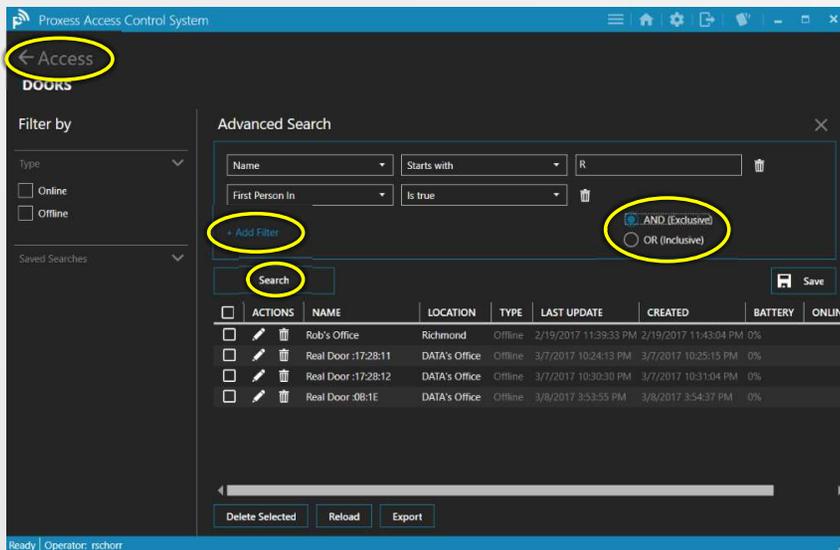


If the select device screen appears, click on the device with the greatest signal strength. Click the "Sync" button and once initialized, the battery level and firmware version for the lock's boards will display. The initialization is complete and you may return to other screens in the App or simply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

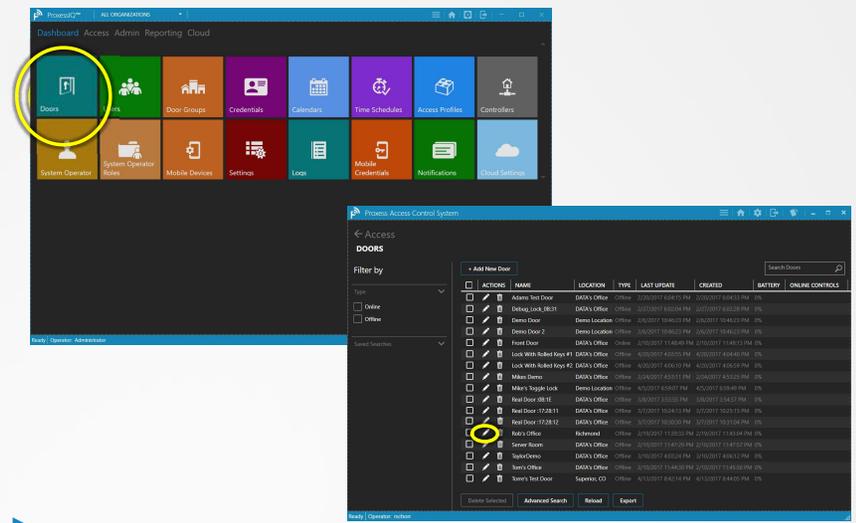




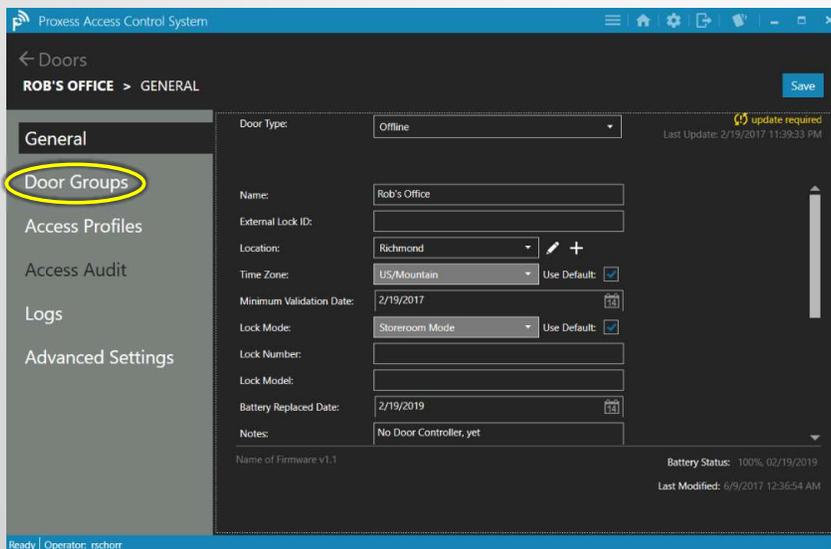
Adding & Editing Doors - 5



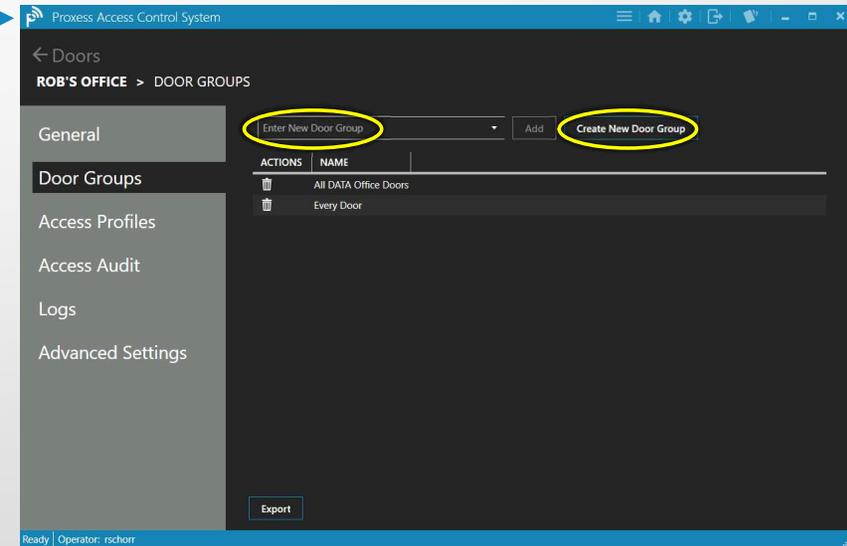
To the first search filter/criteria you have just entered, additional filters can be applied by clicking "Add Filter" and then selecting whether they are to be searched with all conditions needing to be met ("AND") or just one of the conditions needing to be met ("OR"). When all your desired filters have been added, click "Search" and the resulting list appears. Go back to the Main Screen \ Dashboard by clicking "Access".



Click the "Doors" module and then click the edit icon for the door to continue editing properties for.



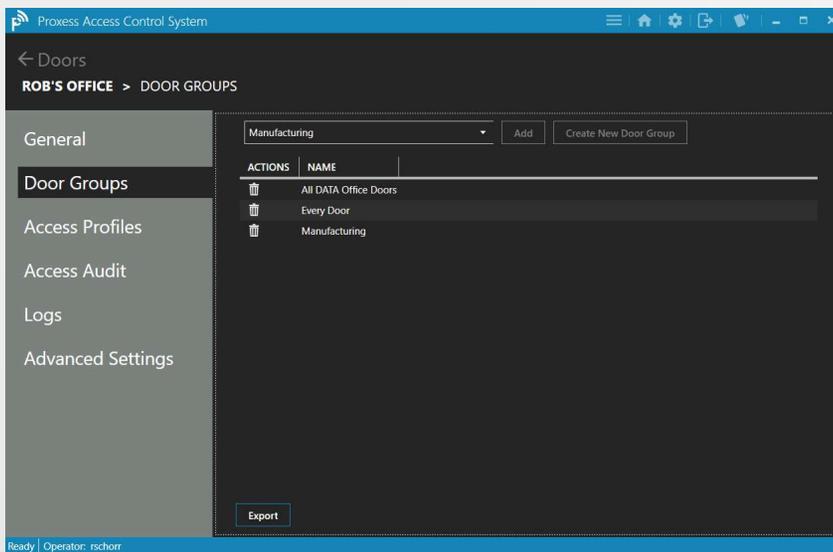
Click the "Door Groups" tab. Note that you may also add Door Groups from the Door Groups menu on the Home page.



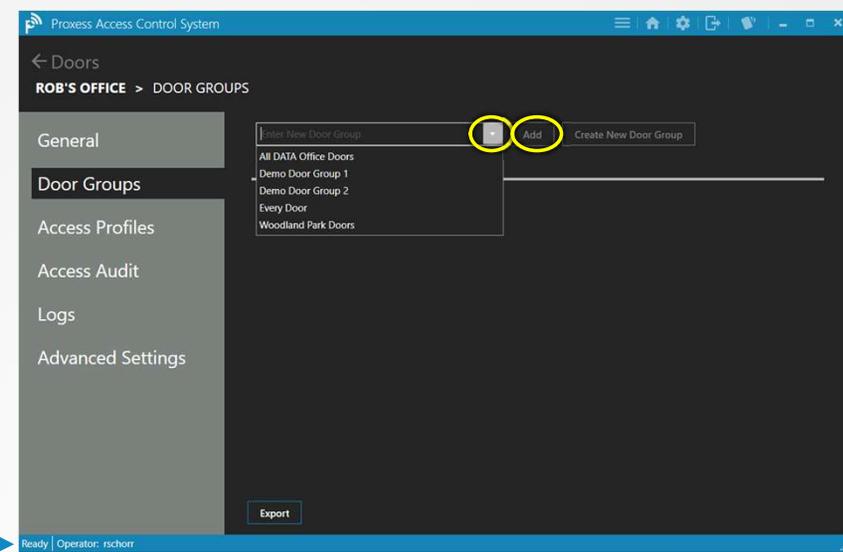
To add a new Door Group, type the name you want in the "Enter New Door Group" field and then click the "Create New Door Group" icon.



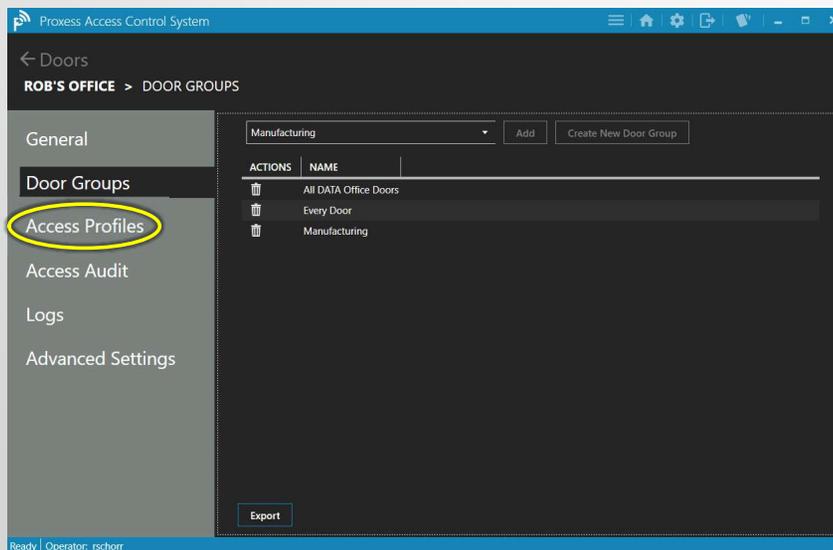
Adding & Editing Doors - 6



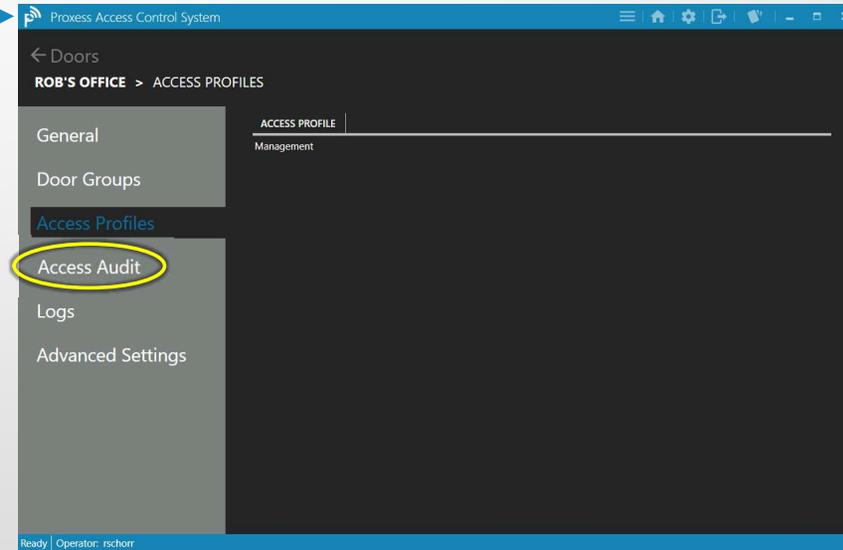
The new Door Group you have created will appear in the list for that Door and will become available to all other Doors in the system.



To add a Door Group for this Door to belong, click the dropdown icon and select a Door Group. Then click "Add". You can add a Door to as many Door Groups as you want.



Click the "Access Profiles" tab.



Any Access Profile that this Door is a part of will appear in this list. It is not necessary for a Door to be part of an Access Profile. If there is no Door listed, you may go back to the Dashboard \ Home Screen and click on the "Access Profiles" module to add this Door to an existing Access Profile or create a new one. Click on "Access Audit".



Adding & Editing Doors - 7

LAST NAME	FIRST NAME	CREDENTIAL ID	CREDENTIAL NAME	ASSIGNMENT TYPE	ASSIGNMENT VIA	VIEW
Schorr	Robert	0	Office Card	Credential	Door	
Geraci	Angelo	0	Credential	Credential	Door	
Test	Joe	0	SMPL020-125266	Credential	Door Group	
M	Mike	0	Credential-7002	Credential	Door Group	
Schorr	Robert	0	Office Card	Credential	Door Group	
Geraci	Angelo	0	Credential	Credential	Door Group	
Schorr	Robert	0	Office Card	Access Profile	Door	
Geraci	Angelo	0	Credential	Access Profile	Door Group	
Schorr	Robert	0	Office Card	Access Profile	Door Group	

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.

0 (Credential)

HQ Staff

Every Door

All DA

Office Da

Rob's Office

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.

Logs

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

DATE	TIME	ACCESS	USER	
6/20/2017	3:22:12 PM	6/20/2017 11:22:12 AM	ACCESS	rschorr
6/20/2017	3:22:06 PM	6/20/2017 11:22:06 AM	ACCESS	rschorr
6/20/2017	3:20:28 PM	6/20/2017 11:20:28 AM	ACCESS	rschorr
6/20/2017	3:17:08 PM	6/20/2017 11:17:08 AM	ACCESS	rschorr
6/20/2017	3:17:04 PM	6/20/2017 11:17:04 AM	ACCESS	rschorr
6/20/2017	3:16:56 PM	6/20/2017 11:16:56 AM	ACCESS	rschorr
6/20/2017	3:16:52 PM	6/20/2017 11:16:52 AM	ACCESS	rschorr
6/20/2017	3:16:45 PM	6/20/2017 11:16:45 AM	ACCESS	rschorr
6/20/2017	3:16:41 PM	6/20/2017 11:16:41 AM	ACCESS	rschorr
6/20/2017	3:16:33 PM	6/20/2017 11:16:33 AM	ACCESS	rschorr

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.



Adding & Editing Doors - 8

Proccess Access Control System

← Doors
ROB'S OFFICE > LOGS

General
Door Groups
Access Profiles
Access Audit
Logs
Advanced Settings
Video Integration

Date Range: Select a date [11] To Select a date [11] Go Clear

ACTIONS	EVENT DATE TIME(UTC)	EVENT DATE TIME(LOCAL)	EVENT CODE	SOURCE
✎	7/6/2017 9:40:00 PM	7/6/2017 5:40:00 PM	DOOR_UPDATE	rschorr
✎	7/6/2017 9:30:44 PM	7/6/2017 5:30:44 PM	DOOR_UPDATE	rschorr
✎	6/20/2017 6:26:36 PM	6/20/2017 2:26:36 PM	LOCK_PARAMETERS_PROGRAMMABLE_VIA_BLE	M, Mike
✎	6/20/2017 6:25:26 PM	6/20/2017 2:25:26 PM	ACCESS	Schorr, R
✎	6/20/2017 6:25:23 PM	6/20/2017 2:25:23 PM	ACCESS	(Geraci, .
✎	6/20/2017 3:22:12 PM	6/20/2017 11:22:12 AM	ACCESS	Schorr, R
✎	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, .
✎	6/20/2017 3:17:08 PM	6/20/2017 11:17:08 AM	ACCESS	Schorr, R
✎	6/20/2017 3:17:04 PM	6/20/2017 11:17:04 AM	ACCESS	(Geraci, .
✎	6/20/2017 3:16:56 PM	6/20/2017 11:16:56 AM	ACCESS	Scherr, R
✎	6/20/2017 3:16:52 PM	6/20/2017 11:16:52 AM	ACCESS	(Geraci, .
✎	6/20/2017 3:16:45 PM	6/20/2017 11:16:45 AM	ACCESS	Schorr, R
✎	6/20/2017 3:16:41 PM	6/20/2017 11:16:41 AM	ACCESS	(Geraci, .
✎	6/20/2017 3:16:33 PM	6/20/2017 11:16:33 AM	ACCESS	Scherr, R

Reload Export

Ready | Operator: rschorr

Click on the "Advanced Settings" tab.

Proccess Access Control System

← Doors
ROB'S OFFICE > ADVANCED SETTINGS

Save

General
Door Groups
Access Profiles
Access Audit
Logs
Advanced Settings
Video Integration

General Advanced

Installation Date: 2/19/2017

Failure Condition: Fail Secure Use Default:

Audit Overwrite Policy: Circular Use Default:

Supervision:

Series Resistor: 5 Use Default:

Parallel Resistor: 5 Use Default:

Toggle Delay Time: 5 Use Default:

Lockdown Configuration

Lockdown Cancel Delay Time: 5 Use Default:

Egress Cancels Lockdown: Use Default:

Pass-Through Cancels Lockdown: Use Default:

Interior LED Lockdown Indication:

Time Illuminated: 1 Use Default:

Time Extinguished: 1 Use Default:

Audio and Visual Feedback

Beep with Programming: Use Default:

Beep when Access Granted: Use Default:

Beep when Access Denied: Use Default:

Exterior LED:

LED Illumination Time for Invalid Access: 1 Use Default:

LED Illumination Time for Valid Access: 1 Use Default:

Event Recording to Card

Valid Access Attempts: Use Default:

Invalid Access Attempts: Use Default:

Contact Points: Use Default:

Lock Events: Use Default:

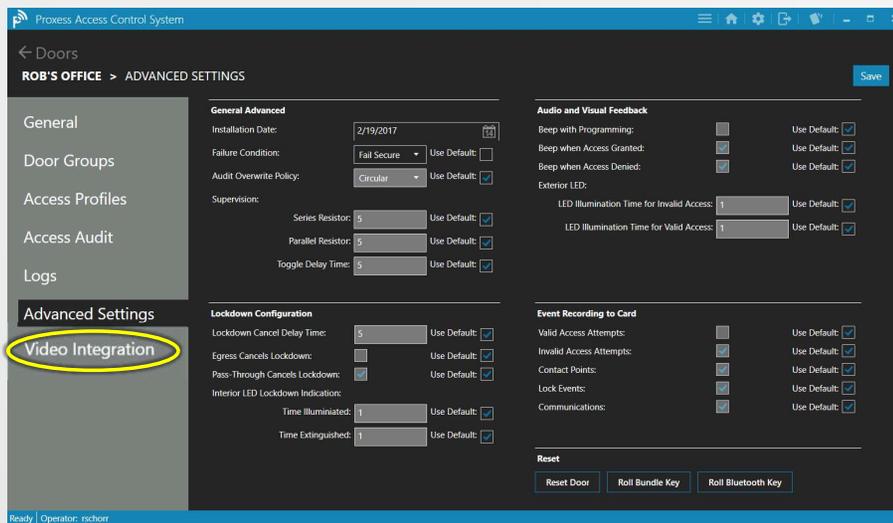
Communications: Use Default:

Reset

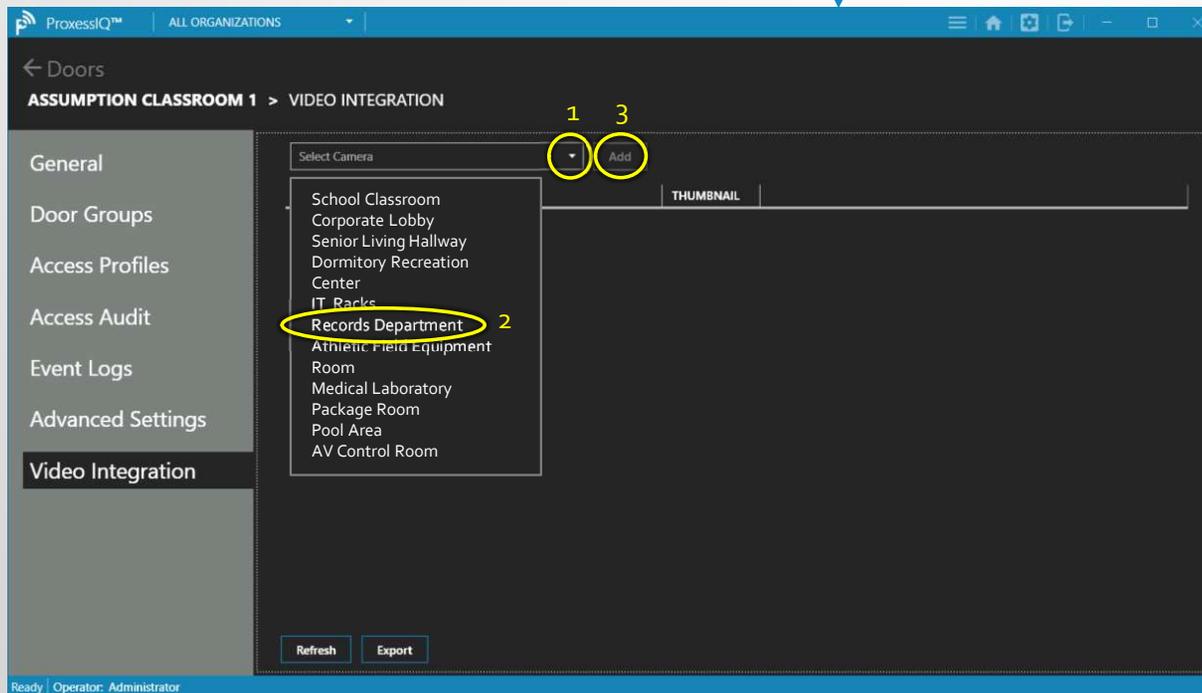
Reset Door Roll Bundle Key Roll Bluetooth Key

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.

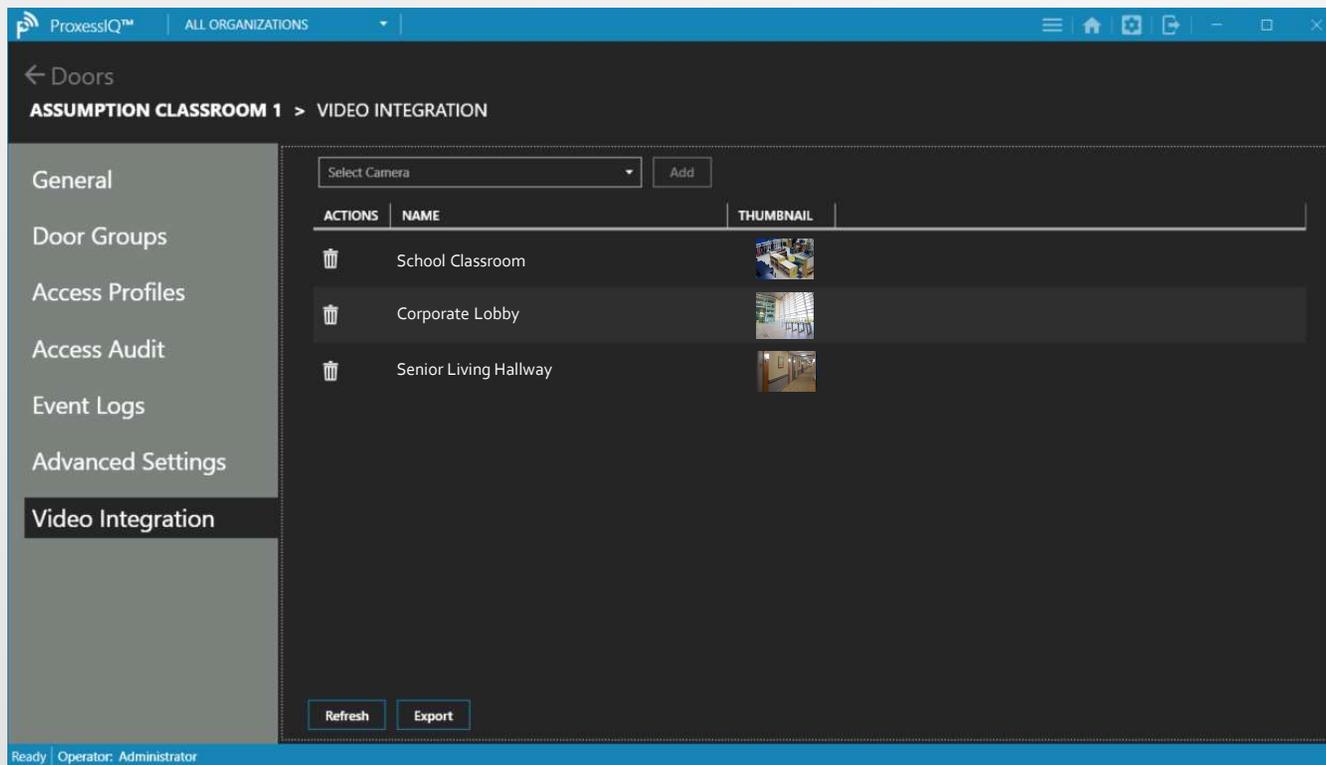


Click on the "Video Integration" tab.



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.



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.



ProxessIQ™ | ALL ORGANIZATIONS

Reporting

AUDITS/EVENTS

Filter by

Saved Searches

- Adhoc →
- General →
- Daily Use →

ACTIONS	EVENT CODE	SOURCE ITEM NAME	SOURCE USER/OPERATOR	EVENT DATE TIME(LOCAL)	CREATED (LOCAL)	ORGANIZATIONS	VIDEO
	ACCESS	Assumption Classroom 1	Teacher, Math	12/4/2023 2:01:42 PM	12/4/2023 2:08:07 PM	1; 1; Global	
	ACCESS	Assumption Classroom 1	Teacher, Math	3/7/2024 3:34:10 PM	3/20/2024 9:19:45 PM	3; 3; Global	
	ACCESS	Assumption Classroom 1	124, Borden	8/8/2023 11:36:36 AM	8/8/2023 11:37:24 AM	8; 8; Global	
	ACCESS	Assumption Classroom 1	124, Borden	8/8/2023 11:36:36 AM	9/20/2023 8:39:27 PM	8; 9; Global	
	ACCESS	Assumption Classroom 1	Teacher, Math	9/25/2023 3:35:35 PM	9/25/2023 3:36:13 PM	9; 9; Global	
	ACCESS	Assumption Classroom 1	Teacher, Math	10/2/2023 11:06:16 AM	10/12/2023 12:05:29 PM	1; 1; Global	
	ACCESS	Assumption Classroom 1	Teacher, Math	1/24/2023 11:34:15 AM	1/24/2023 11:35:06 AM	1; 1; Global	
	ACCESS	Assumption Classroom 1	Teacher, Math	3/18/2024 3:01:15 PM	4/17/2024 11:52:33 AM	3; 4; Global	
	ACCESS	Assumption Classroom 1	Teacher, Math	1/16/2024 8:54:12 AM	1/16/2024 8:54:35 AM	1; 1; Global	
	ACCESS	Assumption Classroom 1	Teacher, Math	1/24/2023 7:06:27 PM	5/18/2023 4:39:00 PM	1; 5; Global	
	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 ORGANIZATIONS

Logs

LOG DETAILS

Log Details

Date: 3/7/2024 8:34 PM

Event Code: ACCESS

Event Code Type: AuditValid Access

Source Type: Lock Audit

Source Item Name: Assumption Classroom 1

Advanced Details: { "Card EventDetails": "57700", "Battery": "100%", "EventDetailCode": "0xE1" }

NAME	THUMBNAIL
BUILD_862IP_Webcam	
usb_cam-HP Wide Vision HD	
Removed [id={ae6a671e-1b47-46fa-156d-eedcdd6831b}	

Ready | 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="admin" />  
<add key="videointegrationpassword" 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.

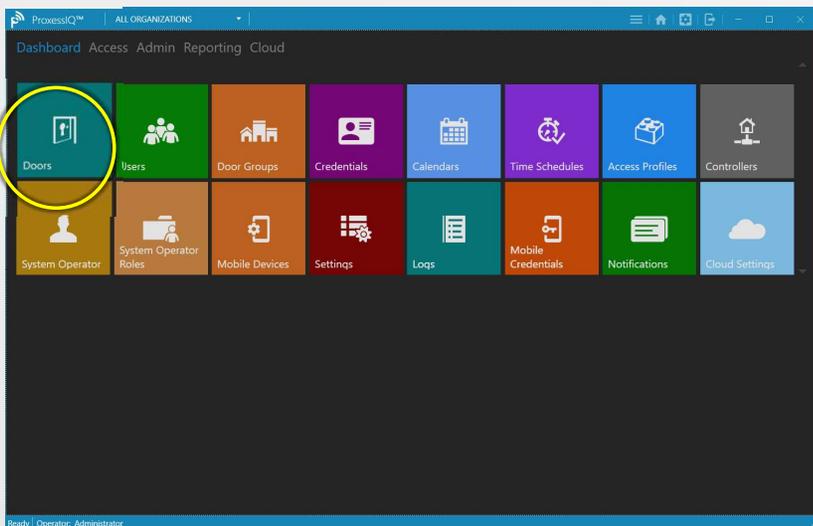


DOORS

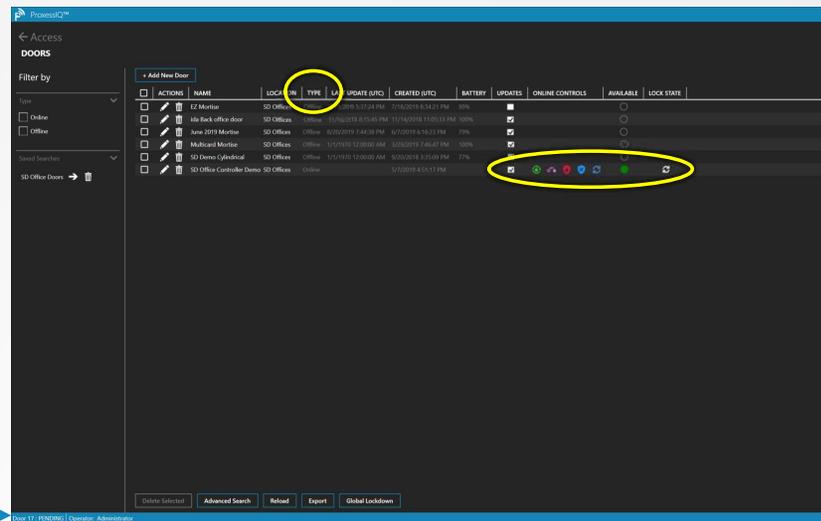
Controlling Online & Bridged Doors



Controlling Online & Bridges Doors - 1



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.



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.

UPDATED (UTC)	BATTERY	UPDATES	ONLINE CONTROLS	AVAILABLE	LOCK STATE
2019 8:34:21 PM	99%	<input type="checkbox"/>		<input type="radio"/>	
7/2018 11:05:33 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2019 6:16:23 PM	100%	<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	
2019 7:46:47 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2018 3:35:09 PM	77%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2019 4:51:17 PM		<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	

Lockdown Door

UPDATED (UTC)	BATTERY	UPDATES	ONLINE CONTROLS	AVAILABLE	LOCK STATE
2019 8:34:21 PM	99%	<input type="checkbox"/>		<input type="radio"/>	
7/2018 11:05:33 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2019 6:16:23 PM	100%	<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	
2019 7:46:47 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2018 3:35:09 PM	77%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2019 4:51:17 PM		<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	

Cancel Lockdown

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

UPDATED (UTC)	BATTERY	UPDATES	ONLINE CONTROLS	AVAILABLE	LOCK STATE
2019 8:34:21 PM	99%	<input type="checkbox"/>		<input type="radio"/>	
7/2018 11:05:33 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2019 6:16:23 PM	100%	<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	
2019 7:46:47 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2018 3:35:09 PM	77%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2019 4:51:17 PM		<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	

Toggle Lock/Unlock

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.



Controlling Online & Bridged Doors - 2

INSTALLED (UTC)	BATTERY	UPDATES	ONLINE CONTROLS	AVAILABLE	LOCK STATE
2019 8:34:21 PM	99%	<input type="checkbox"/>		<input type="radio"/>	
1/2018 11:05:33 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2019 6:16:23 PM	100%	<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	
2019 7:46:47 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2018 3:35:09 PM	77%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2019 4:51:17 PM		<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	

Refresh State

Click this icon to Refresh the state of the lock.

CREATED (UTC)	BATTERY	UPDATES	ONLINE CONTROLS	AVAILABLE	LOCK STATE
7/18/2019 8:34:21 PM	99%	<input type="checkbox"/>		<input type="radio"/>	
11/14/2018 11:05:33 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
6/7/2019 6:16:23 PM	100%	<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	
2/29/2019 7:46:47 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
9/20/2018 3:35:09 PM	77%	<input checked="" type="checkbox"/>		<input type="radio"/>	
6/7/2019 4:51:17 PM		<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	

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

INSTALLED (UTC)	BATTERY	UPDATES	ONLINE CONTROLS	AVAILABLE	LOCK STATE
2019 8:34:21 PM	99%	<input type="checkbox"/>		<input type="radio"/>	
1/2018 11:05:33 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2019 6:16:23 PM	100%	<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	
2019 7:46:47 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2018 3:35:09 PM	77%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2019 4:51:17 PM		<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	

Quick Unlock

Click this icon to perform a Quick/Momentary Unlock this door. The open time is as programmed into the Settings screen in the Doors module.

INSTALLED (UTC)	BATTERY	UPDATES	ONLINE CONTROLS	AVAILABLE	LOCK STATE
2019 8:34:21 PM	99%	<input type="checkbox"/>		<input type="radio"/>	
1/2018 11:05:33 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2019 6:16:23 PM	100%	<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	
2019 7:46:47 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2018 3:35:09 PM	77%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2019 4:51:17 PM		<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	

Momentary Unlock

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

INSTALLED (UTC)	BATTERY	UPDATES	ONLINE CONTROLS	AVAILABLE	LOCK STATE
2019 8:34:21 PM	99%	<input type="checkbox"/>		<input type="radio"/>	
1/2018 11:05:33 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2019 6:16:23 PM	100%	<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	
2019 7:46:47 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2018 3:35:09 PM	77%	<input checked="" type="checkbox"/>		<input type="radio"/>	
2019 4:51:17 PM		<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	

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.

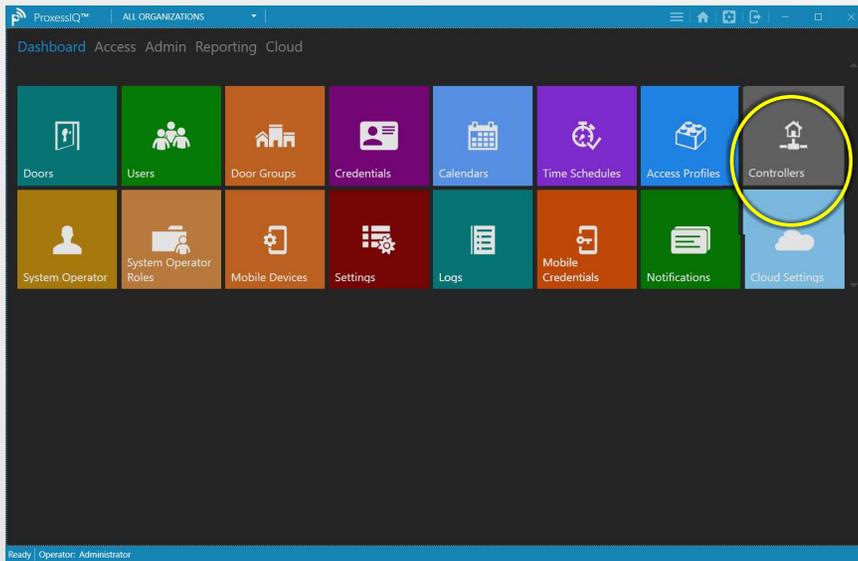
In a pinch, any iPhone or Android phone can connect to the enrollment reader to encode or wipe cards.



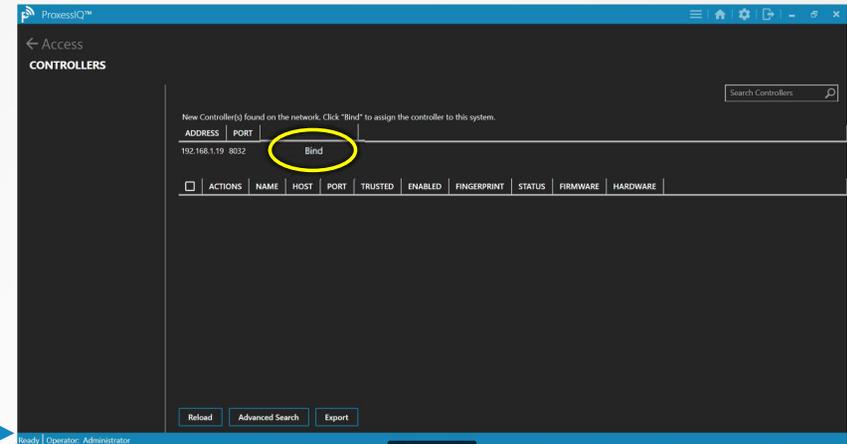
CONTROLLERS



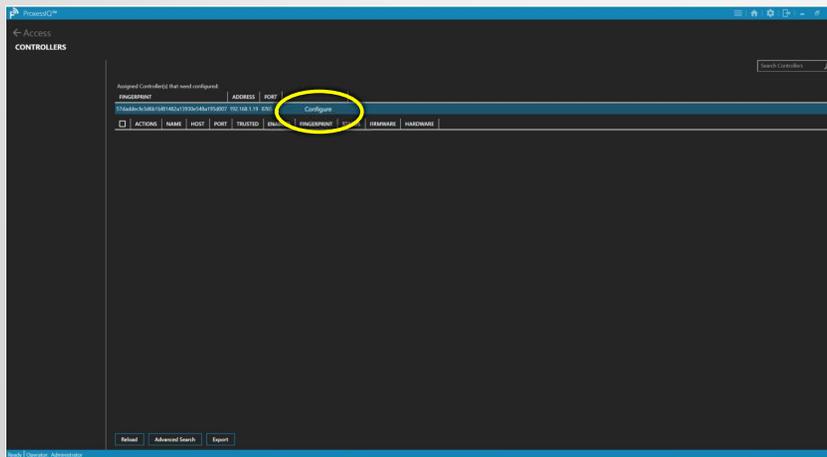
Adding & Editing Controllers - 1



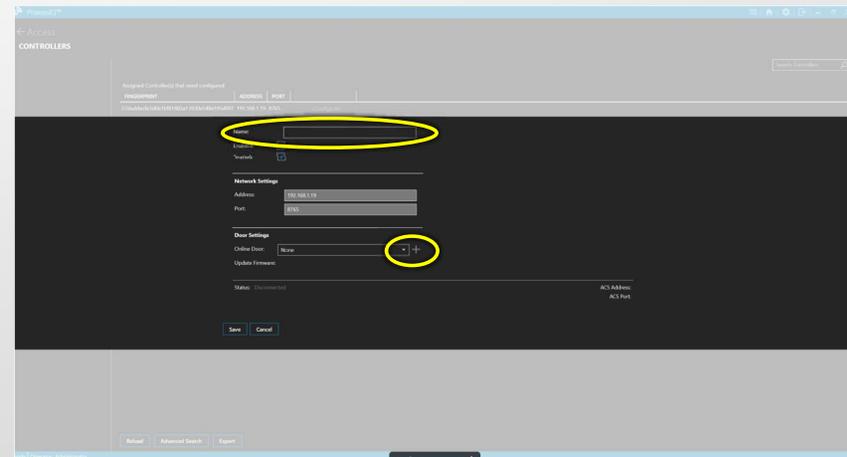
To add a controller to the system, click on the "Controller" module icon. After adding a Controller, you will then be able to select entry & exit readers that you have added into the "Doors" module to connect.



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



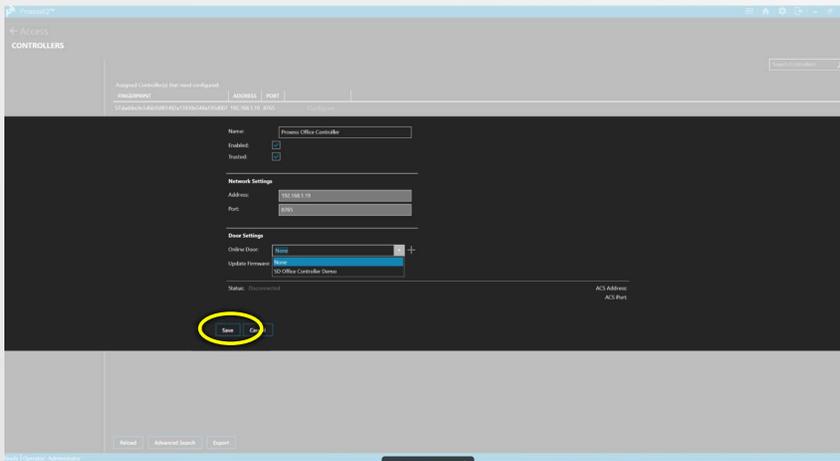
Now click "Configure" to have the software configure this controller for its proper function within this software instance.



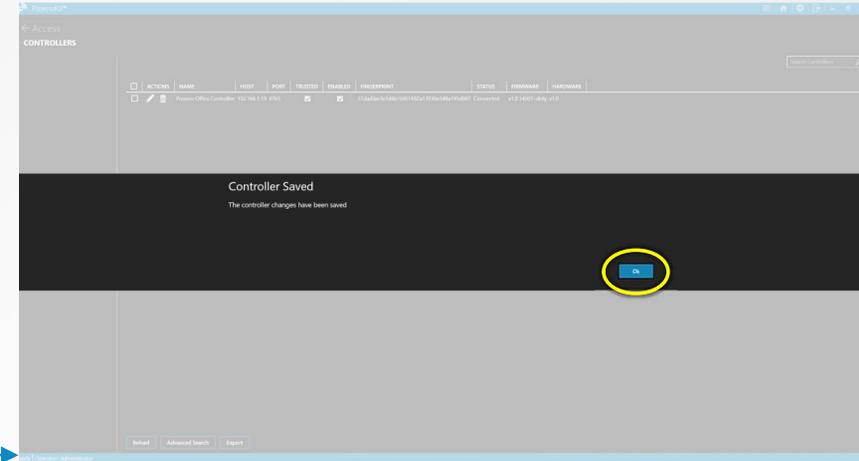
Type a name for this controller. Next, click on the drop-down arrow above.



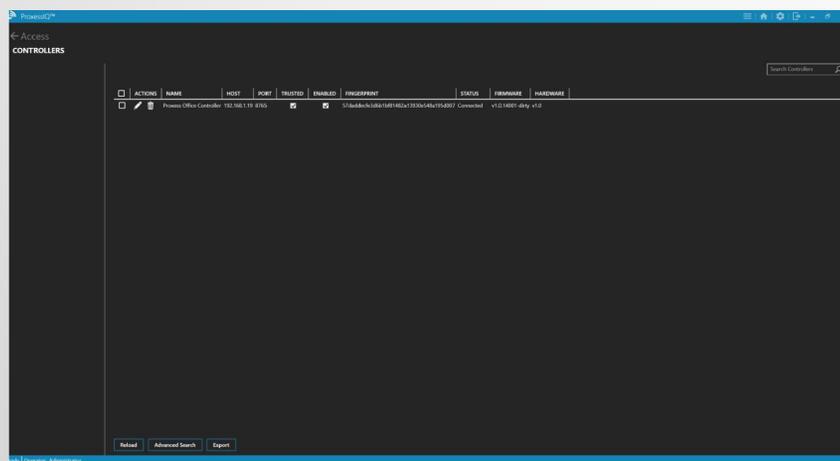
Adding & Editing Controllers - 2



Select any reader that you have already entered in the "Door" module to be connected to this controller. Then click "Save".

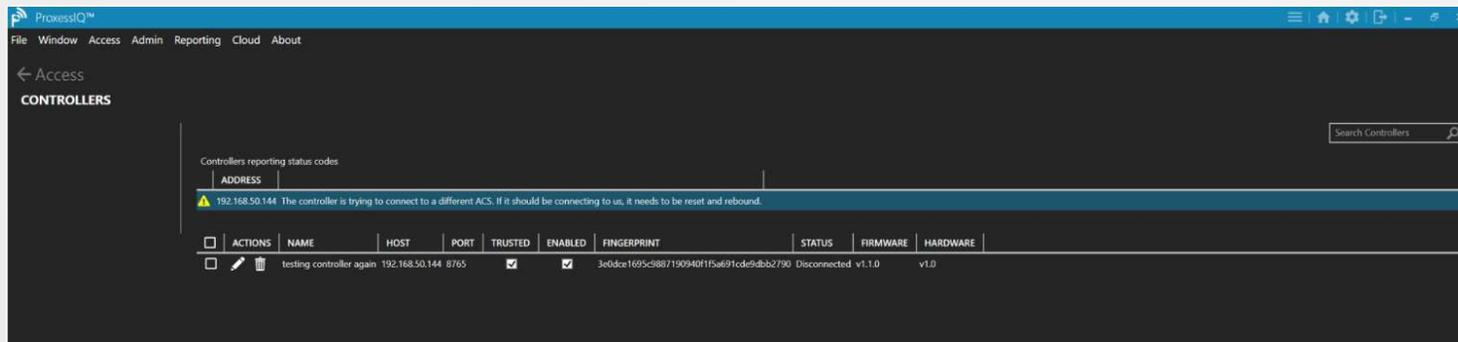


Click "OK" on the verification screen.



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

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.



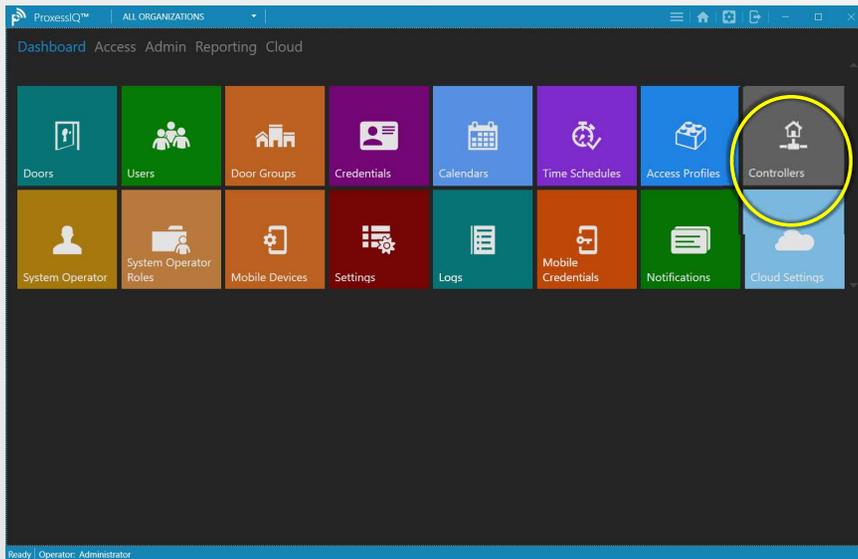
Note: It is unlikely, but possible to receive this Controller screen error message. For instance, if a controller from another system is placed on the network for your system (in a dealer's lab, for instance), your software will note the above, prompting your investigation and possible resetting of that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

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

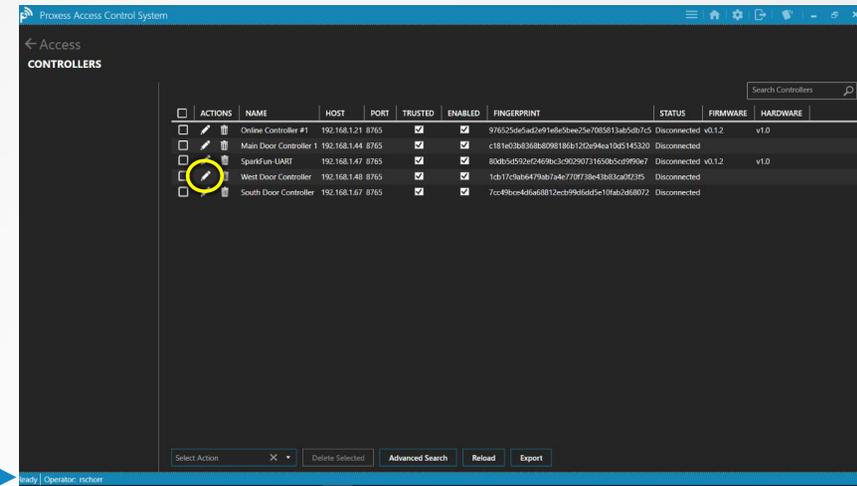
- Controllers reporting status codes
- New Controller(s) found on the network. Click "Bind" to assign the controller to this system.
- The Controller is unable to reach the Proxess service. Check inbound TCP firewall rules.
- The Controller is timing out during key exchange. This is likely caused by 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.



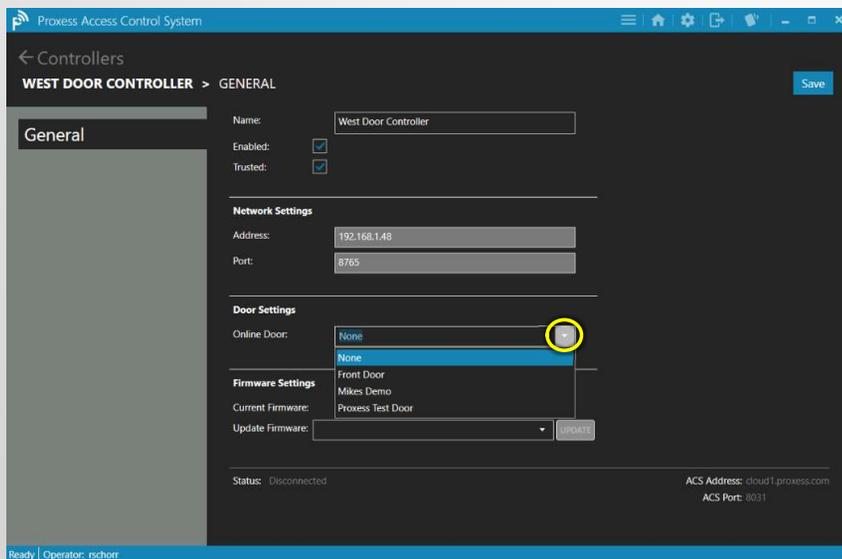
Adding & Editing Controllers - 4



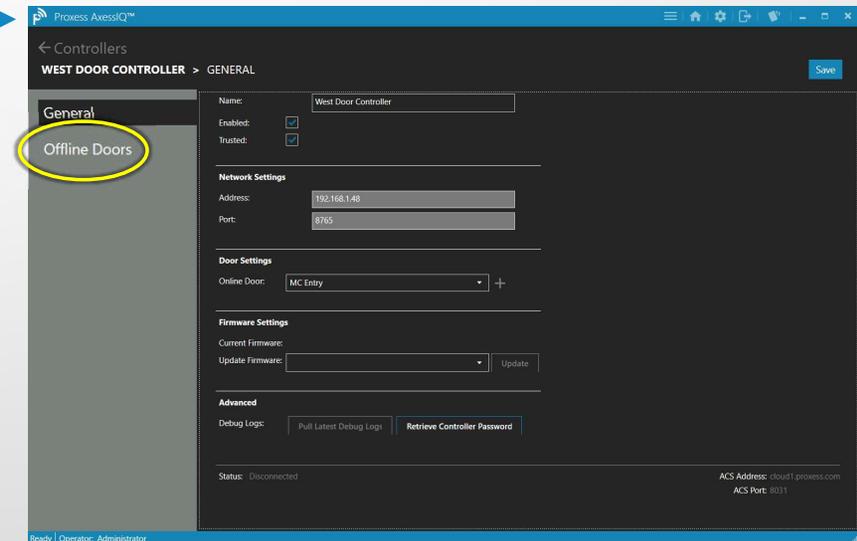
To add a door controller to the system, click on the "Controller" module icon. After adding a Controller, you will then be able to select entry & exit readers that you have added into the "Doors" module to connect.



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



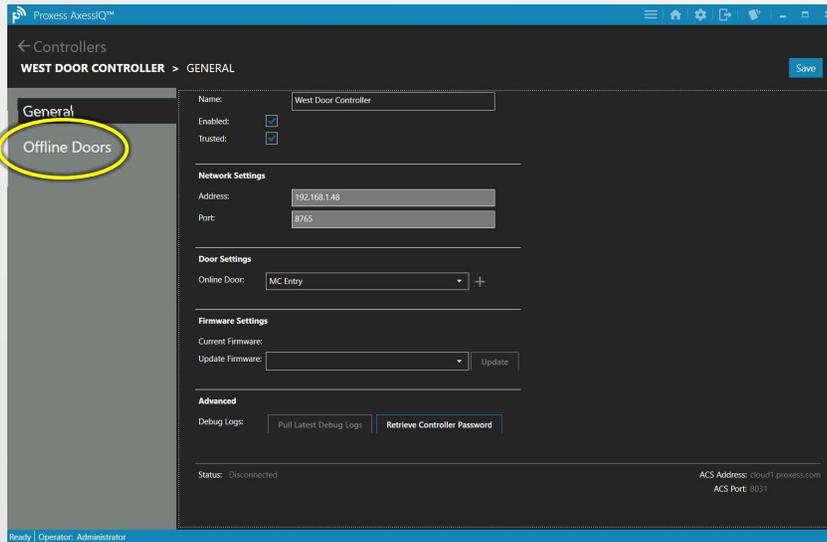
Add any door that has been defined as "Online" in the "Door Type" field of the *Doors* module may be connected to this controller by clicking this arrow and selecting it from the drop-down list.



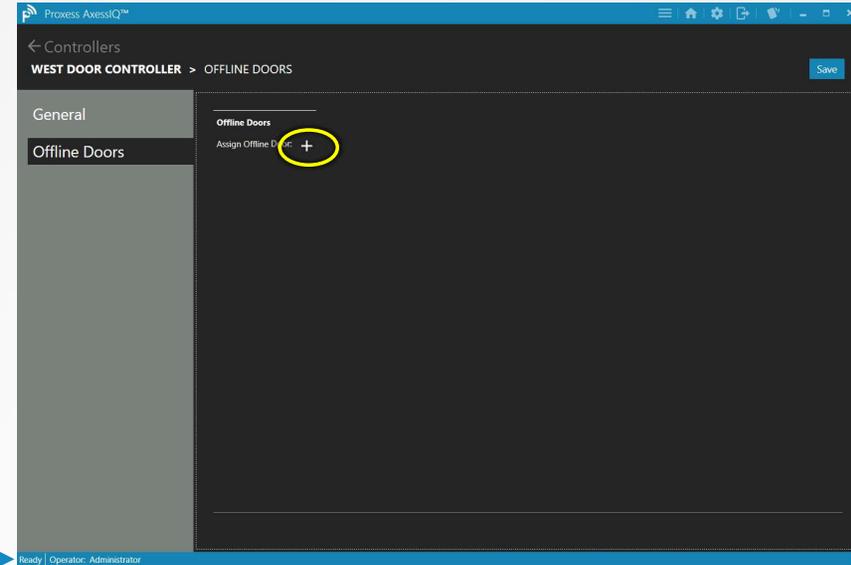
The Controller screen now shows the reader that has been attached to that Controller.



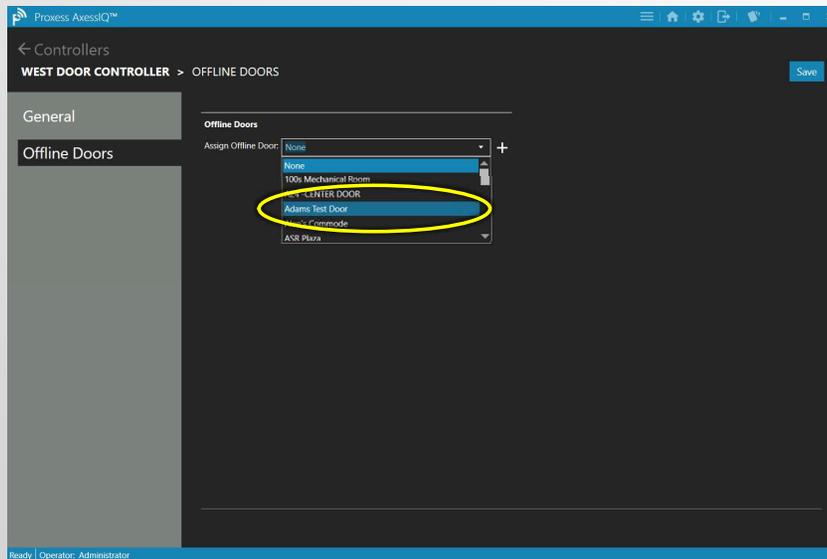
Adding & Editing Controllers - 5



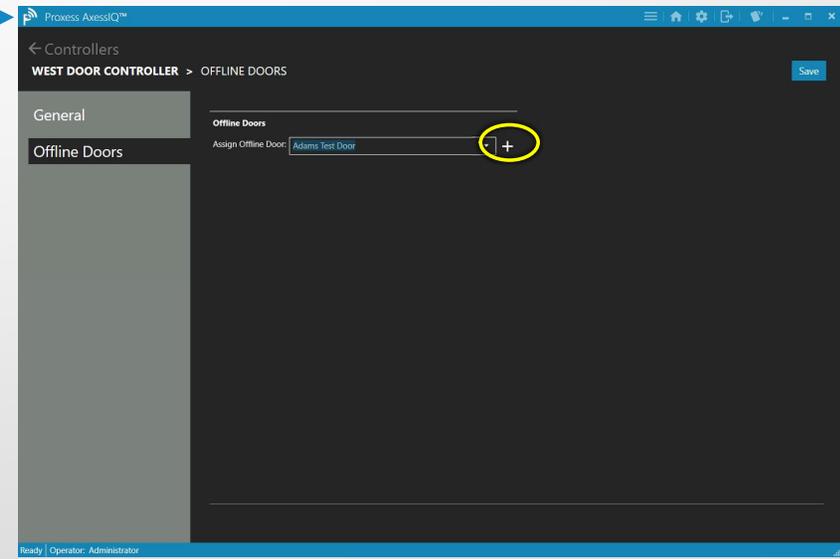
Now click on "Offline Doors" to bind cylindrical locksets, mortise locksets and Mini-Controllers to the Controller.



Up to eight (8) locksets and mini-controllers can be bound to a single controller.

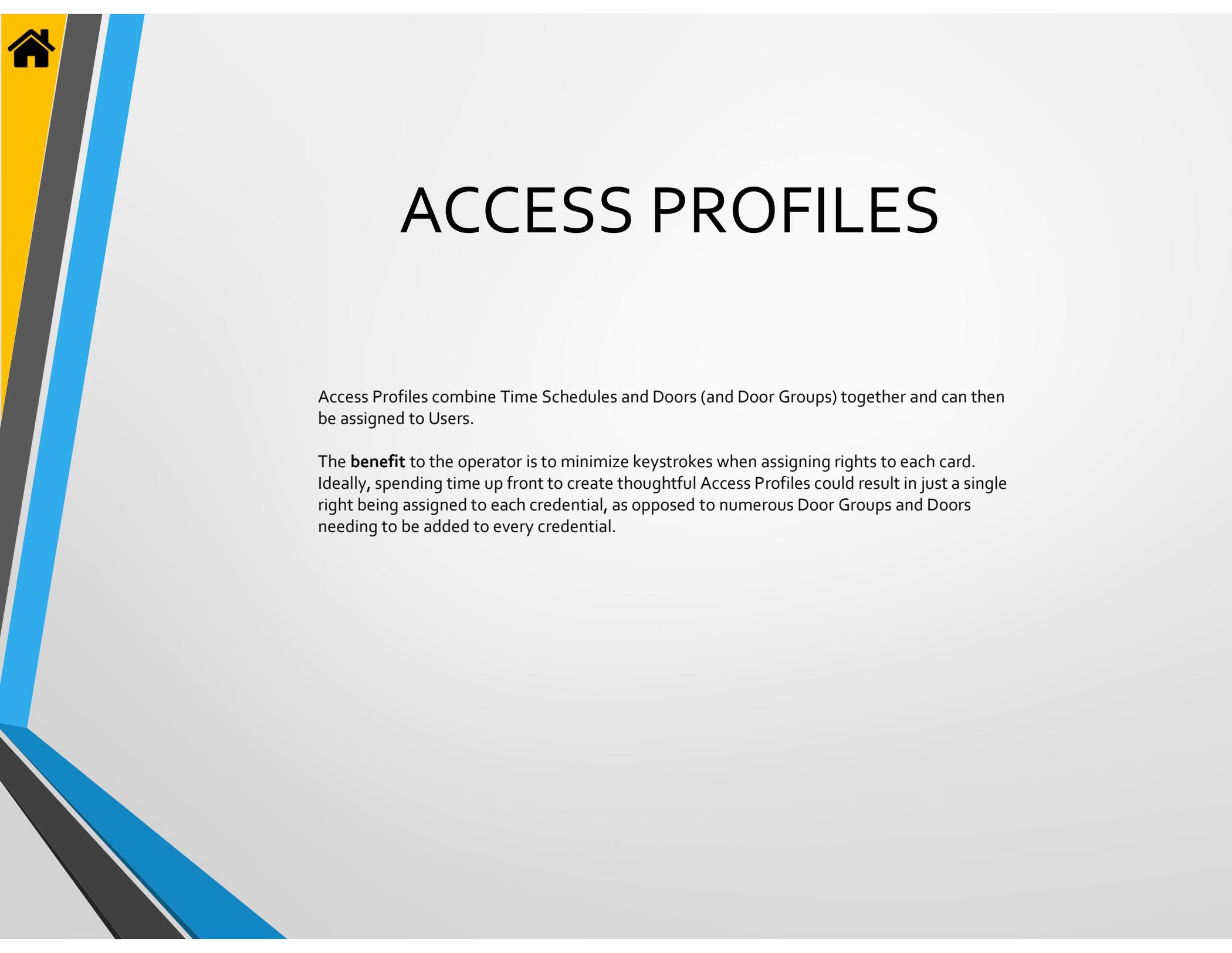


Add any door (i.e. Lockset and Mini-Controller) that has been defined as "Offline" in the "Door Type" field of the *Doors* module may be connected to this controller selecting it from the drop-down list.



Up to eight (8) total locksets and mini-controllers can be connected to a controller.

A lockset or M-C can only be connected to one (1) controller. Take care to select locksets or M-Cs to be connected that can easily be "seen" and controlled by the software, in the "Doors" module.



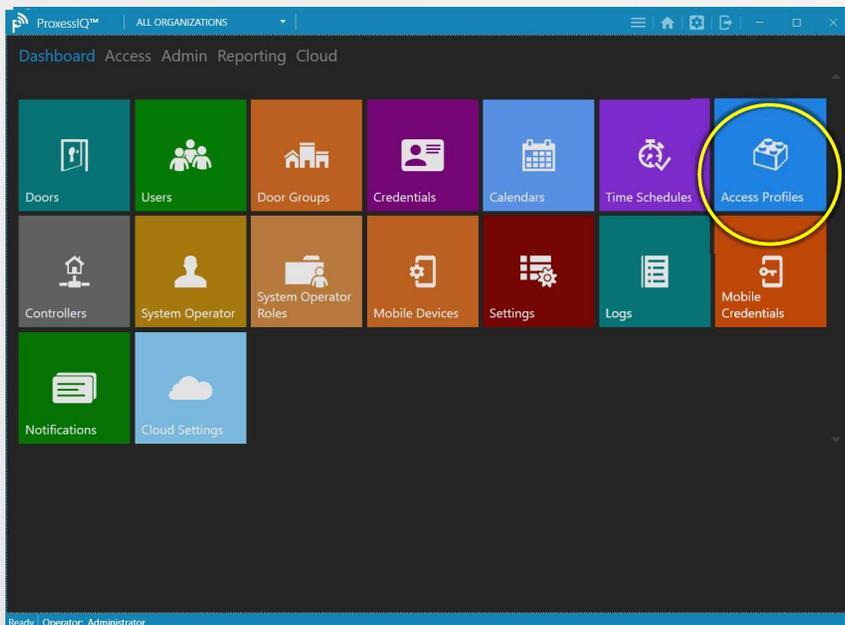
ACCESS PROFILES

Access Profiles combine Time Schedules and Doors (and Door Groups) together and can then be assigned to Users.

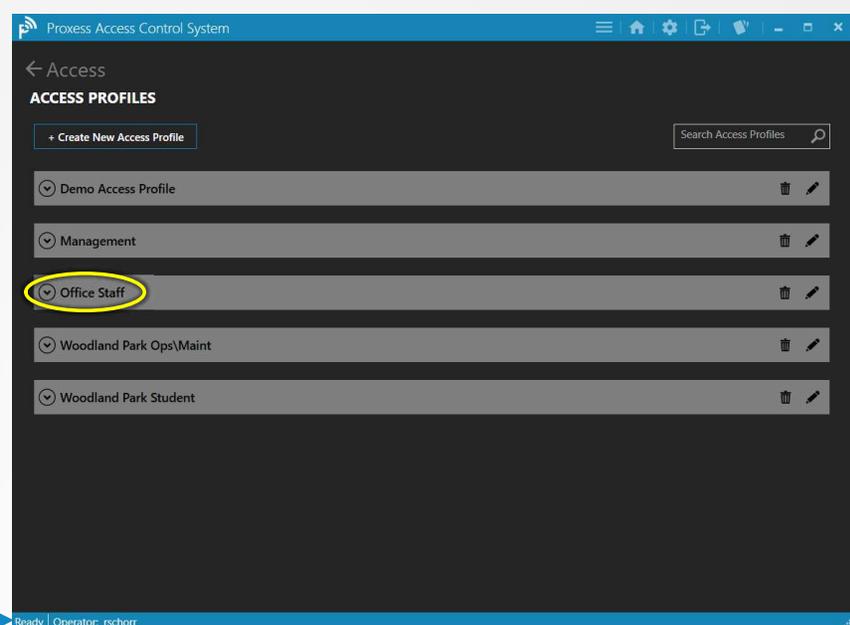
The **benefit** to the operator is to minimize keystrokes when assigning rights to each card. Ideally, spending time up front to create thoughtful Access Profiles could result in just a single right being assigned to each credential, as opposed to numerous Door Groups and Doors needing to be added to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



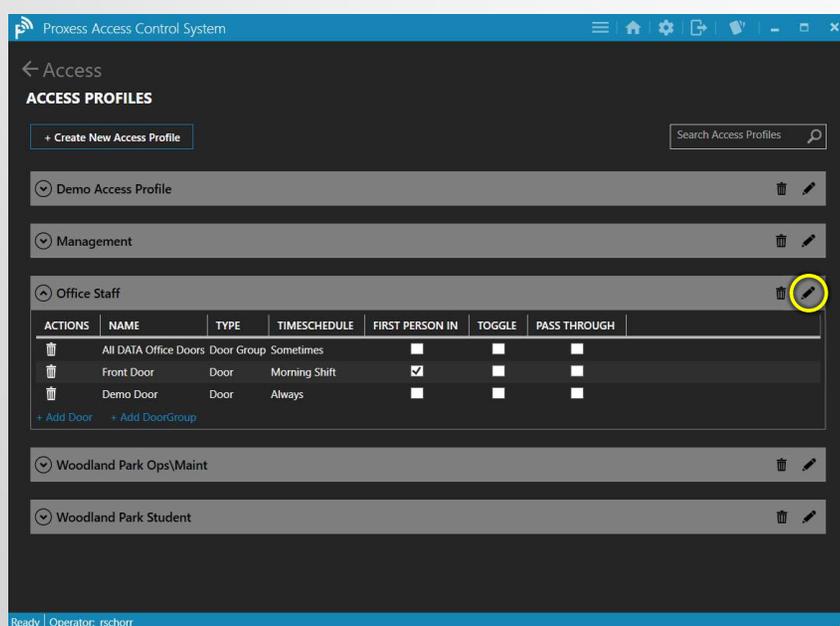
Access Profiles - 1



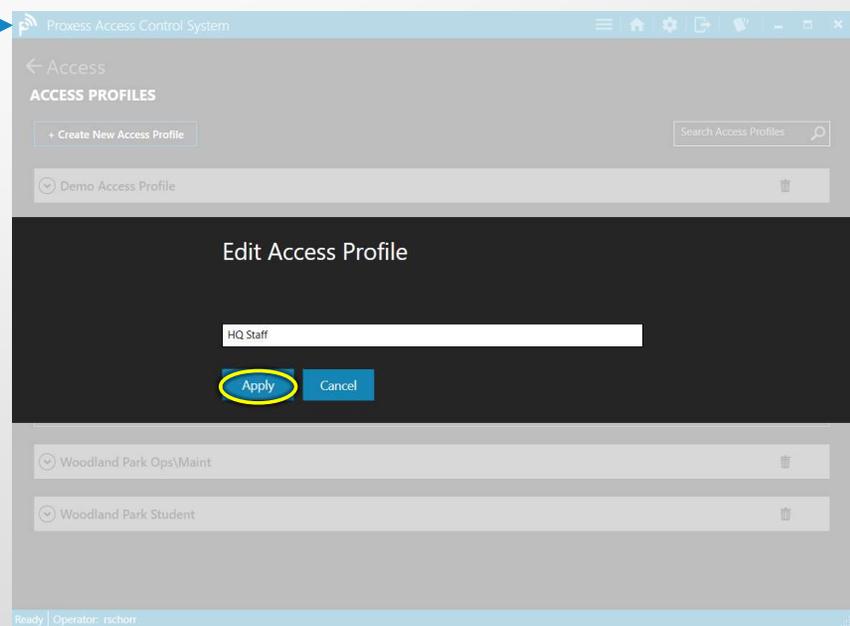
Access Profiles combine Time Schedules and Doors (and Door Groups) together and can then be assigned to Users. To create or edit them, click the "Access Profiles" icon.



For a quick edit note, if there is one, click an existing Access Profile.



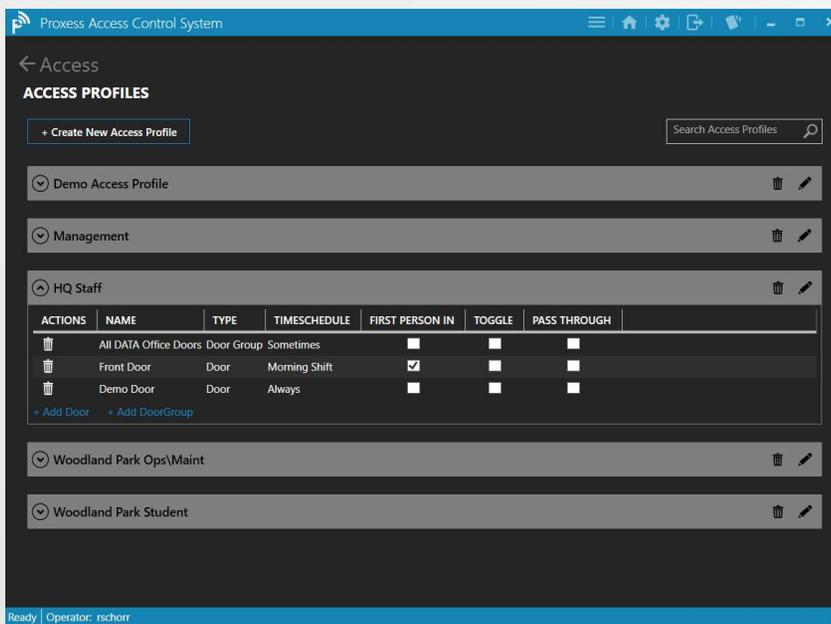
Click the Edit icon.



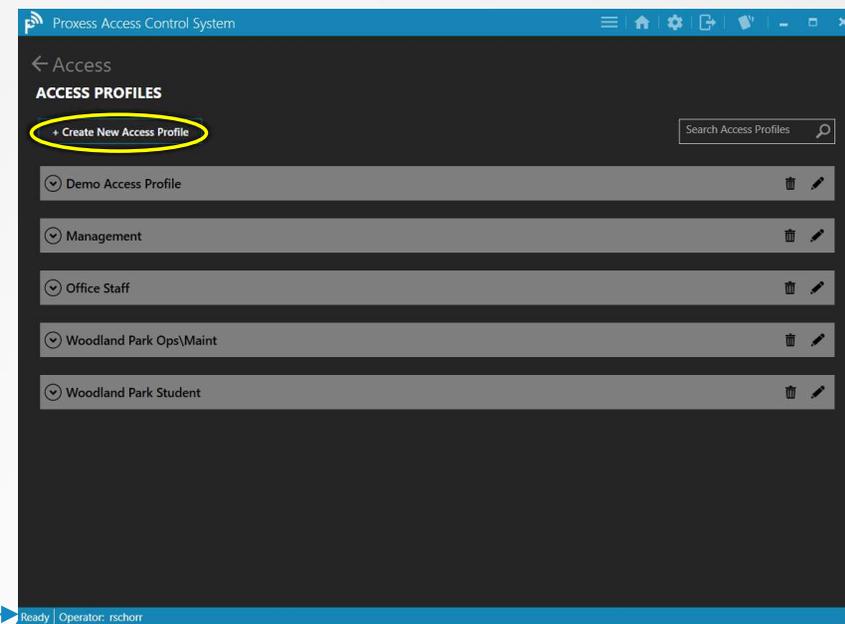
Change the name and click "Apply".



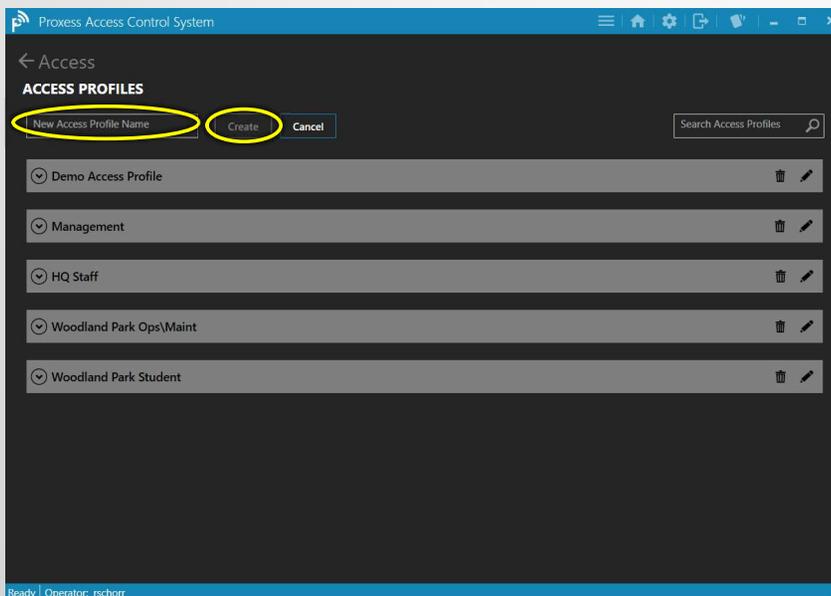
Access Profiles - 2



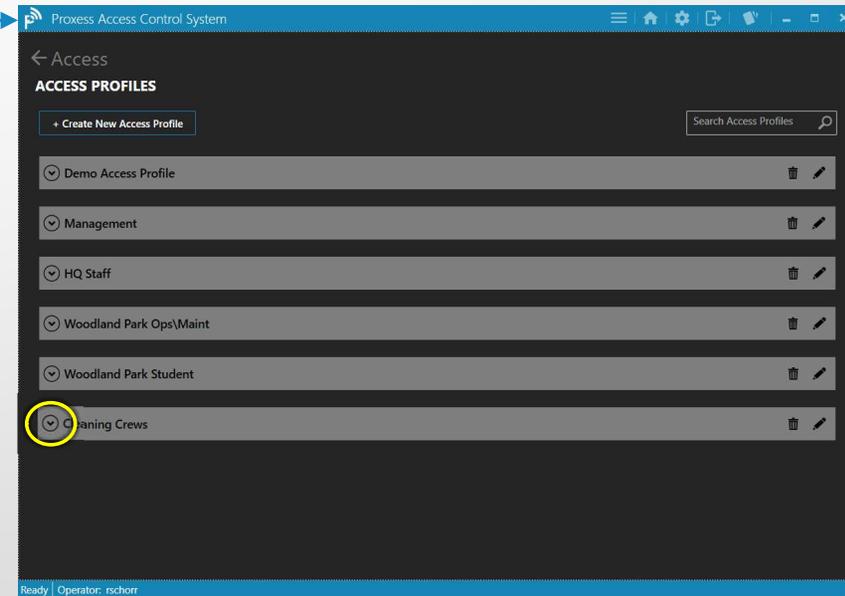
The new Access Profile name appears.



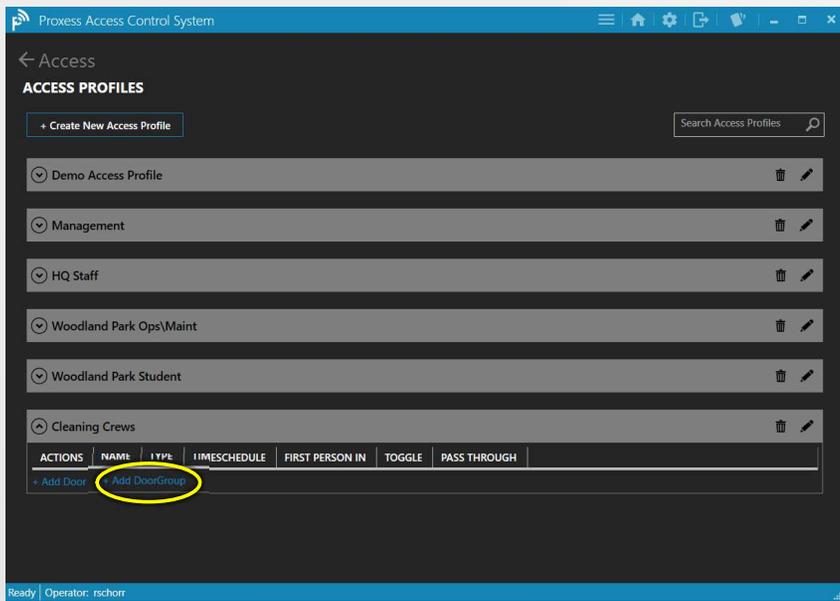
Click "Create New Access Profile".



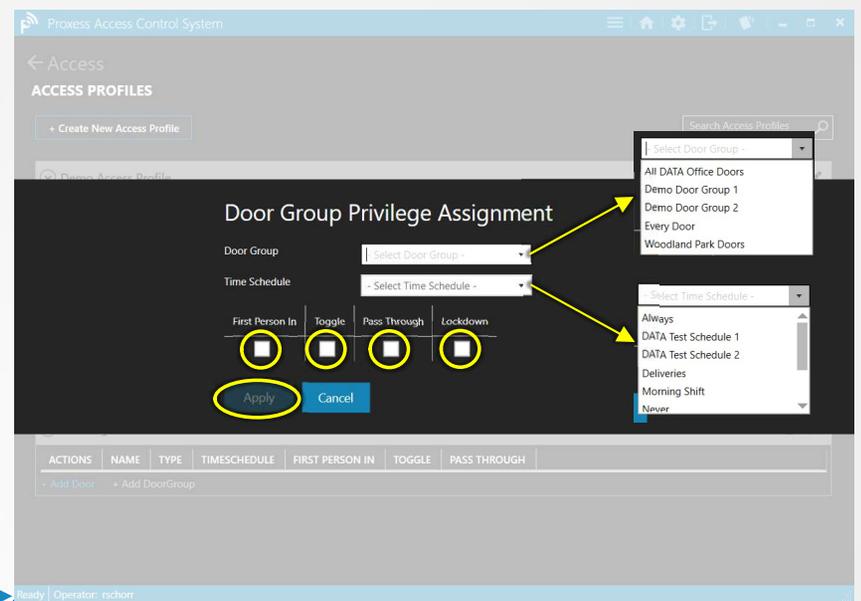
Enter a name for the new Access Profile and then click "Create".



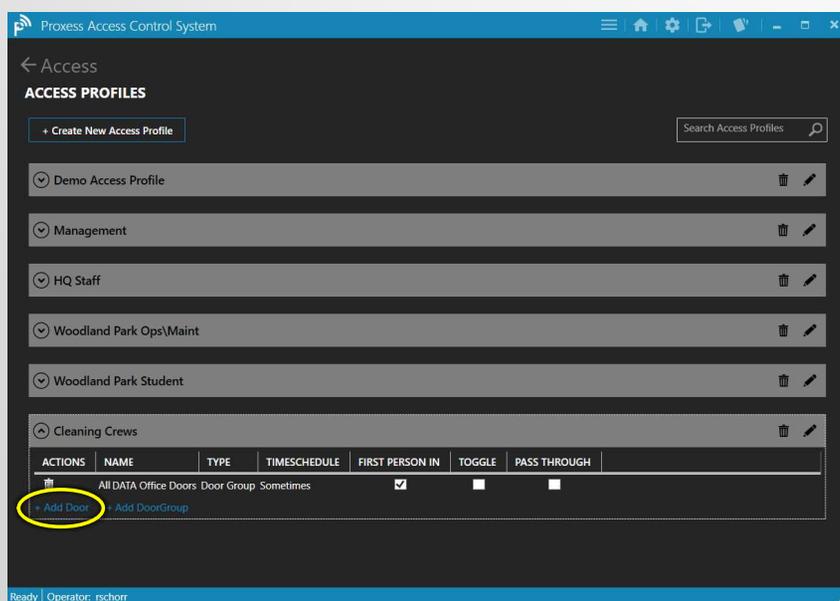
The new Access Profile appears. Click the dropdown arrow to view and edit the details.



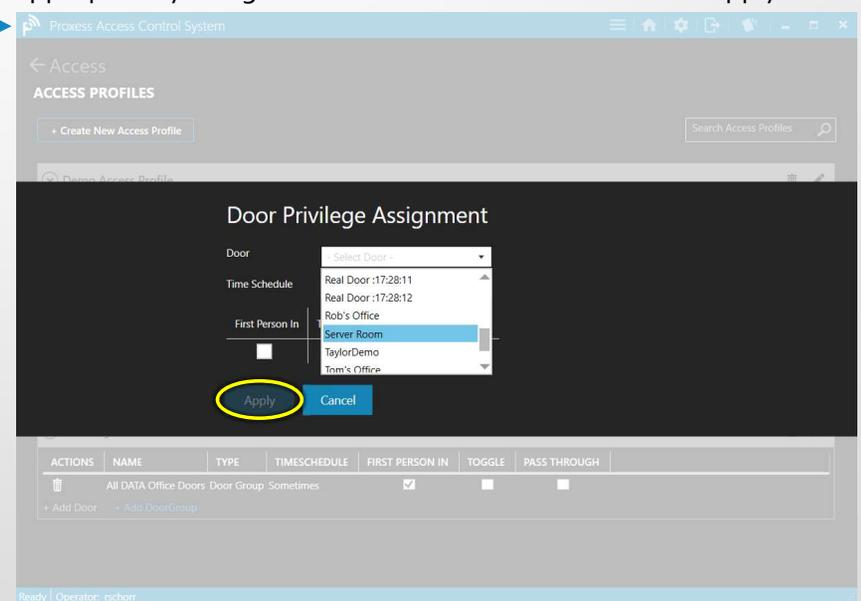
To add a Door Group to the new Access Profile, click "Add Door Group".



Use the dropdown arrows to select the Door Group to add along with the corresponding Time Schedule that those doors will operate within. Check any of the features that can be used at those doors by appropriately designated cardholders\Users and click "Apply".



After adding a Door Group and returning to this screen, click "Add Door".



After clicking the "Add Door" button from the main Access Profile screen, select the Door and its corresponding Time Schedule and check off the features that can be used at those doors by appropriately designated cardholders\Users and click "Apply".



Proxess Access Control System

← Access

ACCESS PROFILES

+ Create New Access Profile

Search Access Profiles

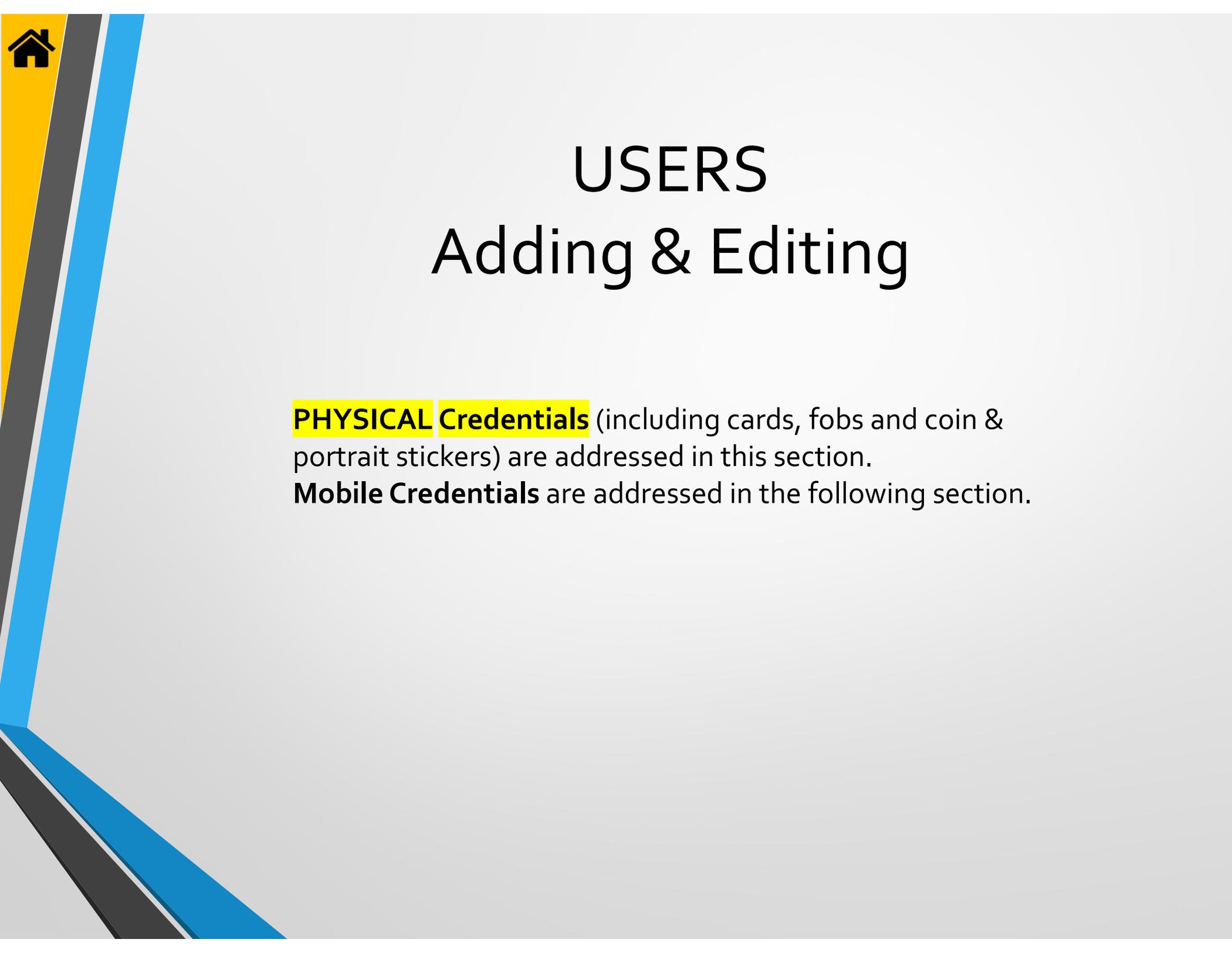
- ▼ Demo Access Profile
- ▼ Management
- ▼ HQ Staff
- ▼ Woodland Park Ops\Maint
- ▼ Woodland Park Student
- ▼ Cleaning Crews

ACTIONS	NAME	TYPE	TIMESCHEDULE	FIRST PERSON IN	TOGGLE	PASS THROUGH
	All DATA Office Doors	Door Group	Sometimes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Server Room	Door	Sometimes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

+ Add Door + Add DoorGroup

Ready | Operator: rschorr

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.



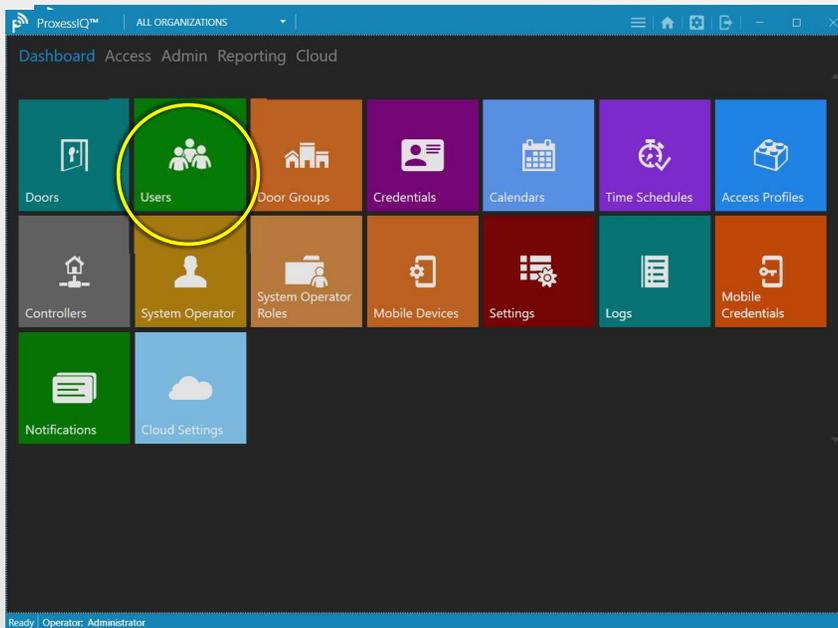
USERS

Adding & Editing

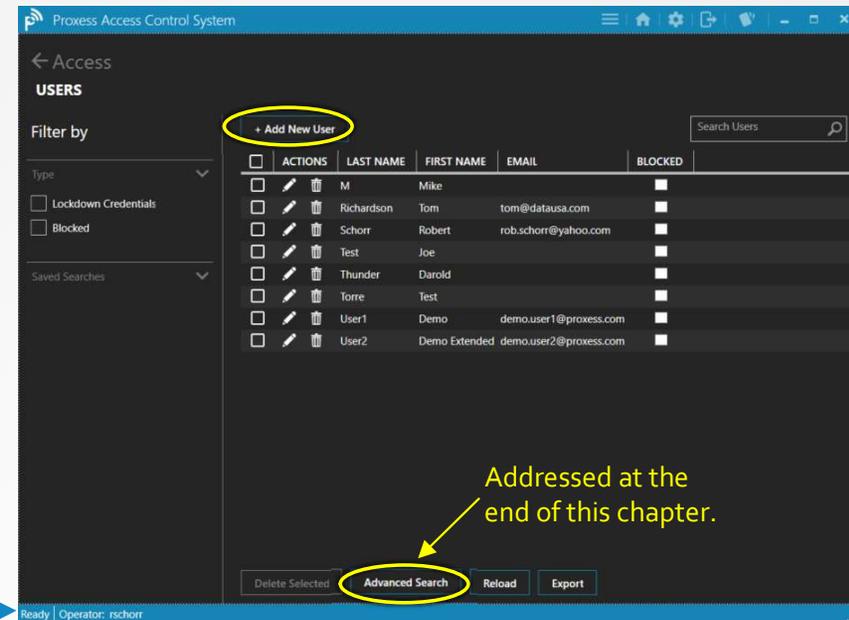
PHYSICAL Credentials (including cards, fobs and coin & portrait stickers) are addressed in this section.
Mobile Credentials are addressed in the following section.



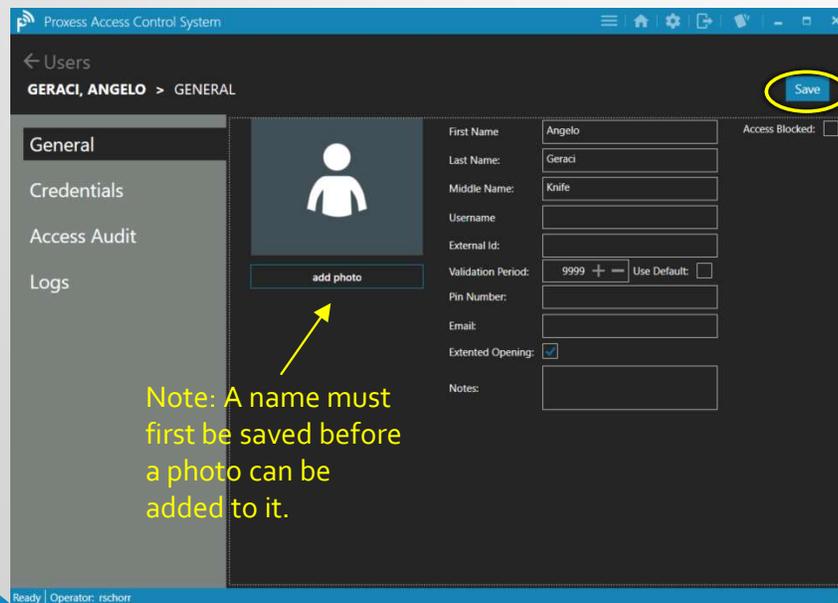
Adding New Users & Credentials - 1



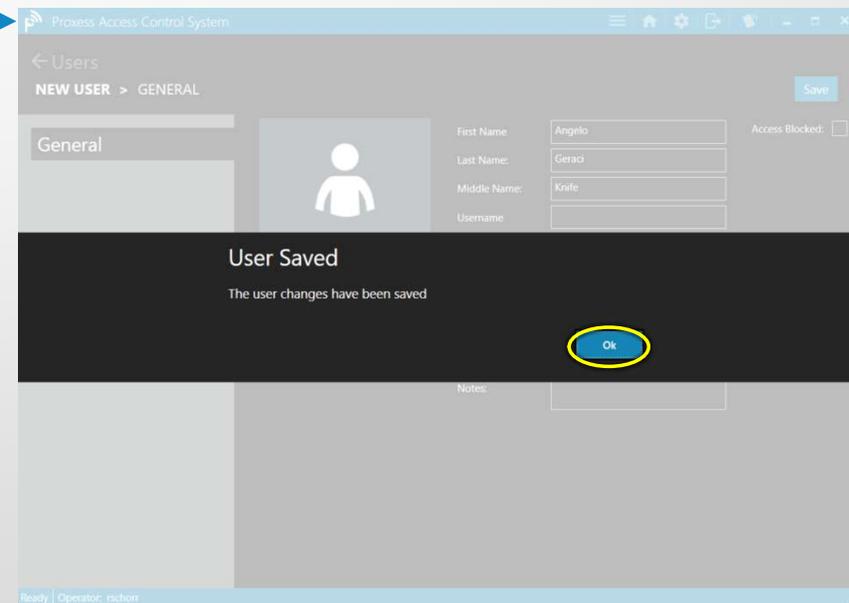
The Users module is where we add and edit new Users\ Cardholders and credentials. Their rights to access doors and door groups are also defined here. Click the "Users" icon.



From the main Users screen you can edit, delete and block individual cardholders. The list can be filtered\sorted by checking one or both of the boxes on the left: "Lockdown" and "Blocked" and Users can be searched for by typing letters in their name in the Search box. Click "Add New User" to do so.

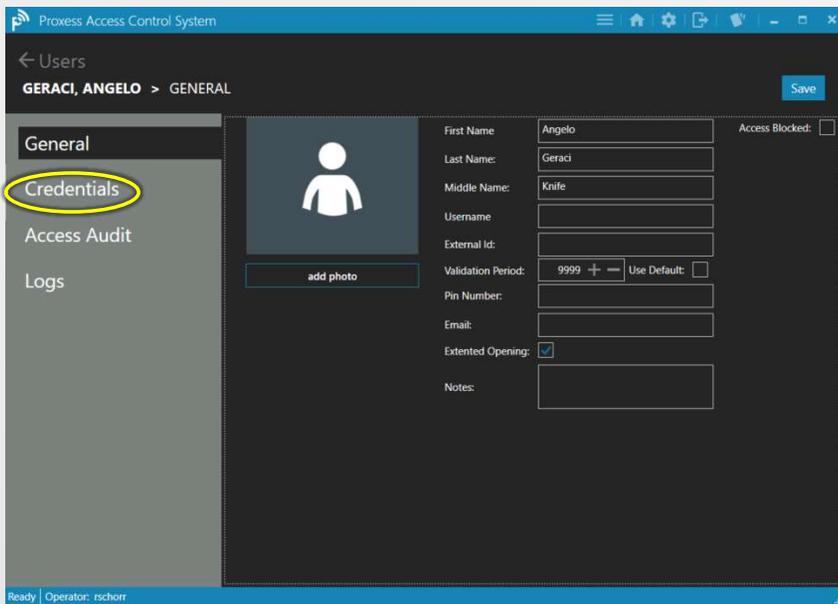


Note: A name must first be saved before a photo can be added to it.

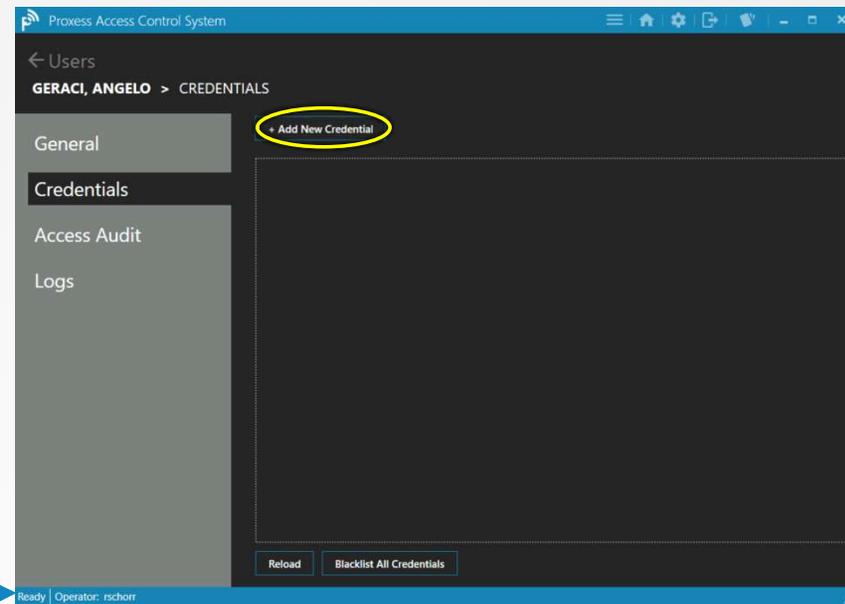


Add the essential new user information, including just their first and last name. Optional information includes the "Validation Period", the number of days a credential has to check-in at an online reader, before access is denied (leave this high for offline systems) and an Extended Opening checkbox, 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.

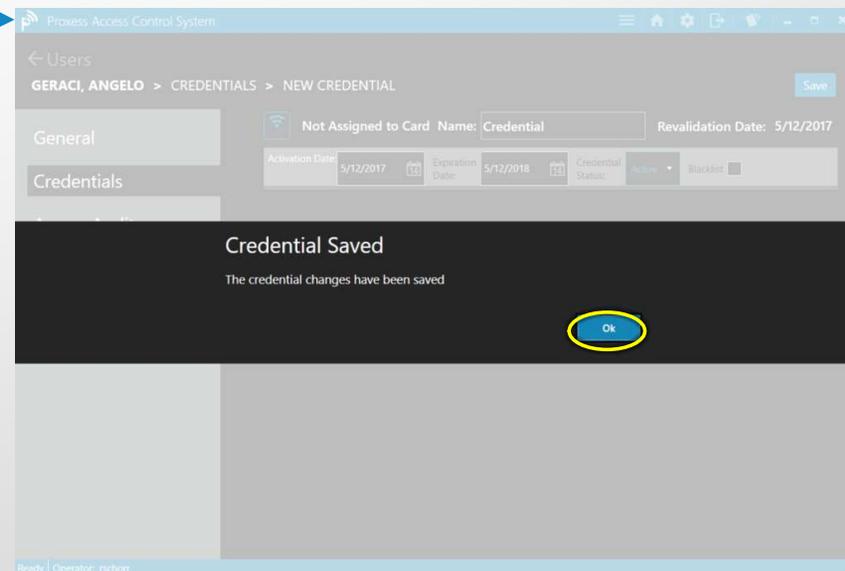
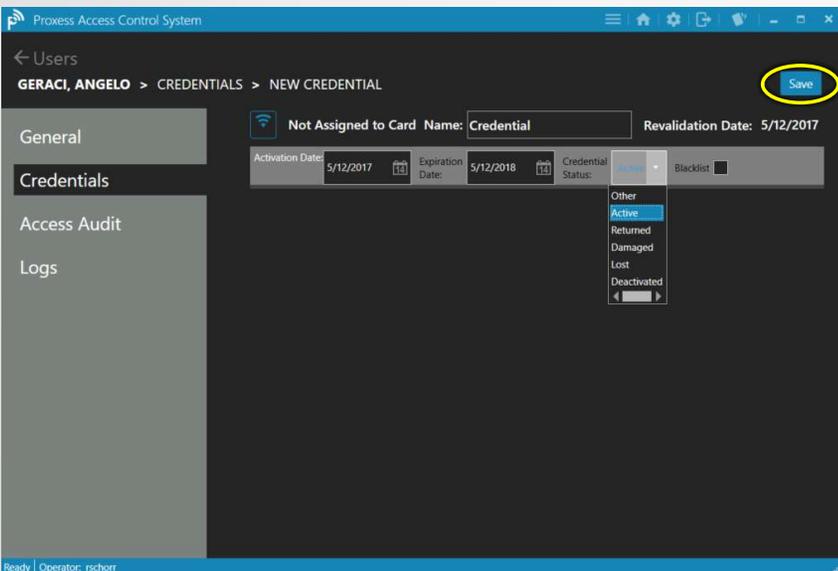
Adding New Users & Credentials - 2



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



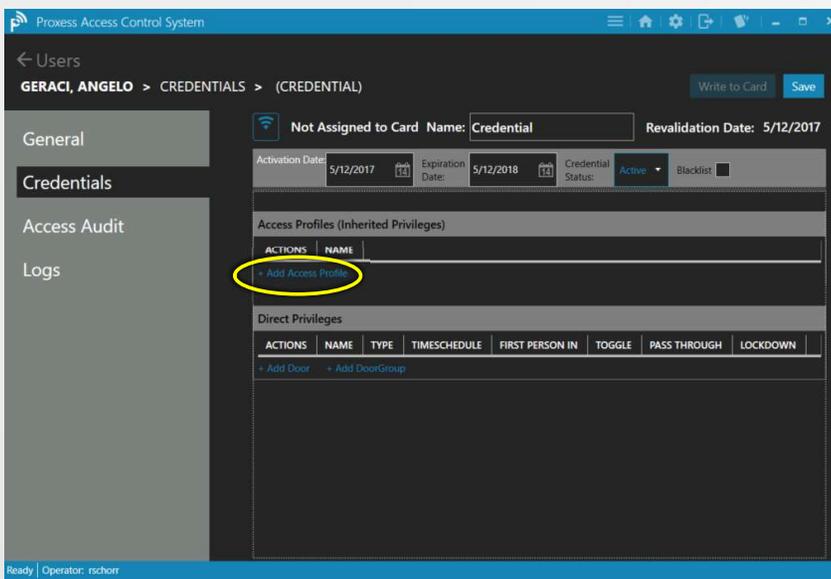
For this User, click "Add New Credential". As many credentials as desired may be issued to a User.



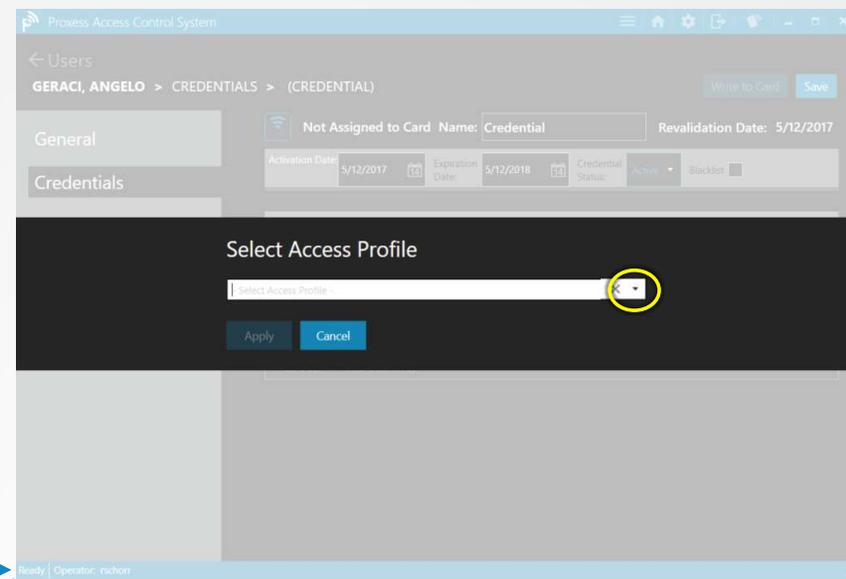
Select the Activation Date, which is usually left as the current date, but may be set at a future date. Select the Expiration Date of the card, which may be on an annual basis, by semester for schools, or at go days for evaluations of new hires. Select the Status of this credential and check the box 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".



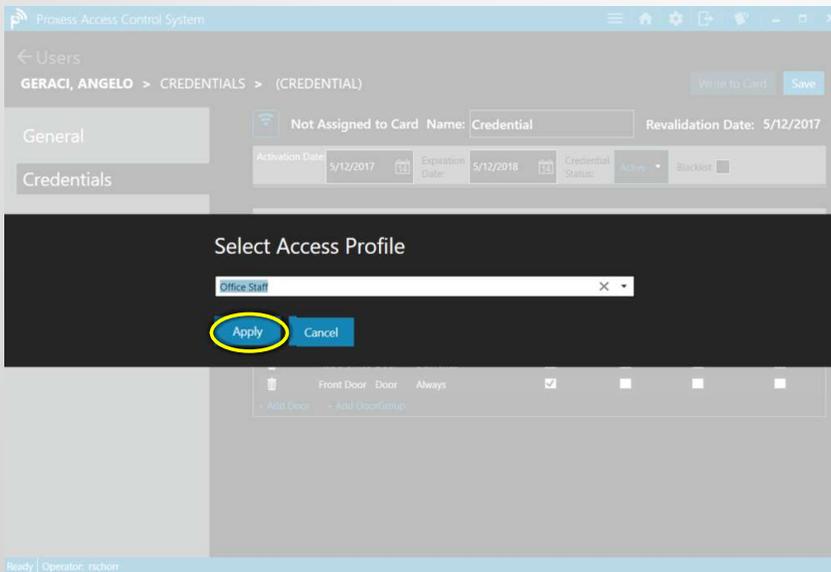
Adding New Users & Credentials - 3



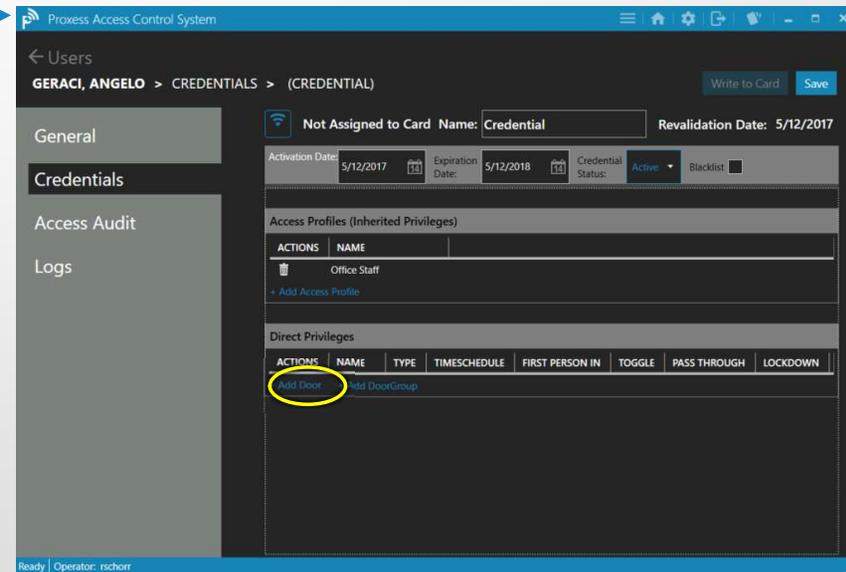
The rights for this credential to access various doors may now be selected. This is done by selecting one or more "Access Profiles" and/or one or more "Door Groups" and individual "Doors". These have been set up in their respective programming modules. Click "Add Access Profile", if desired.



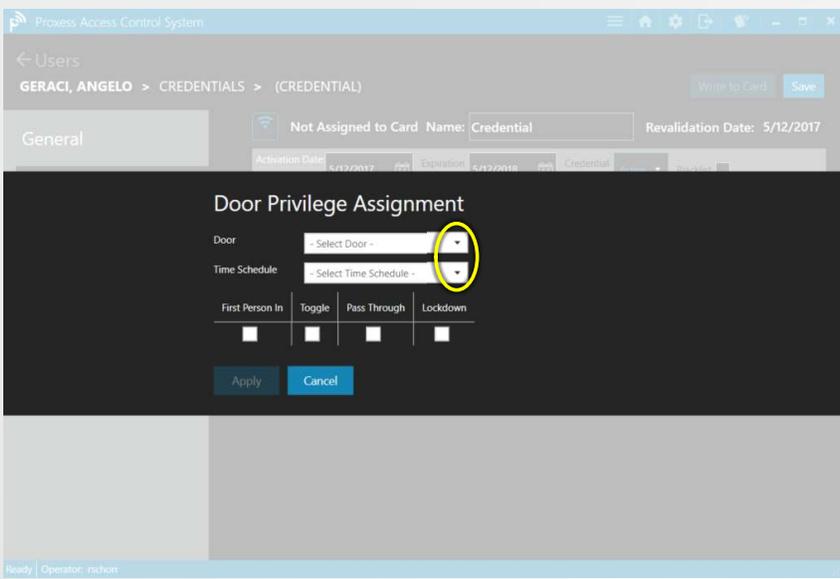
To choose an Access Profile, click the dropdown arrow, or "Cancel" to return to the previous screen.



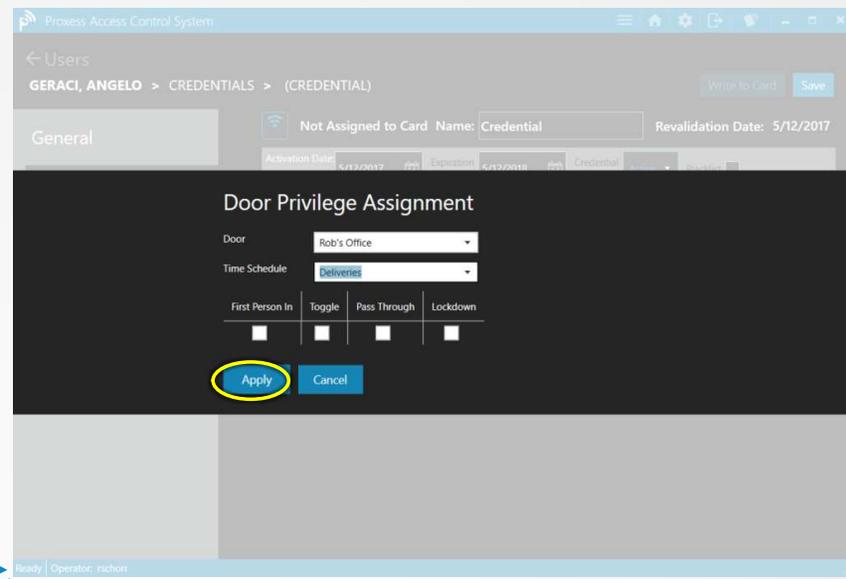
Select the desired Access Profile from the list and click "Apply".



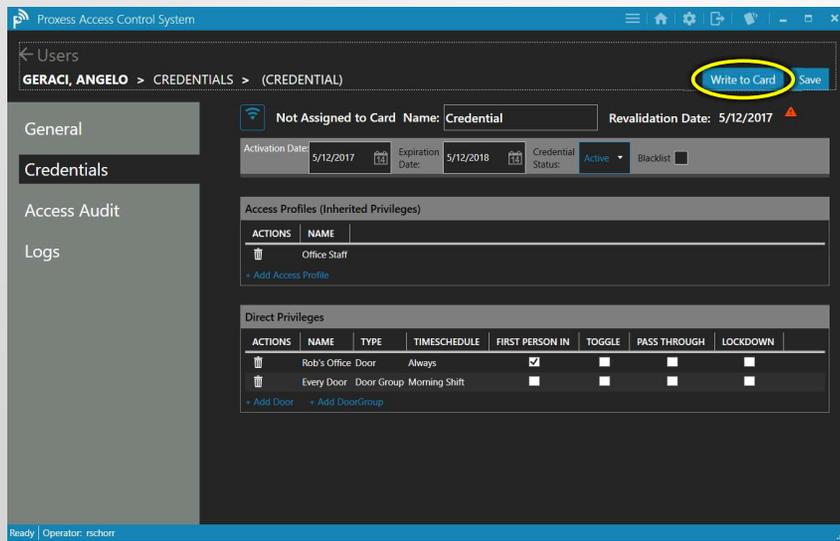
To add a door for this credential to have access to, click "Add Door".



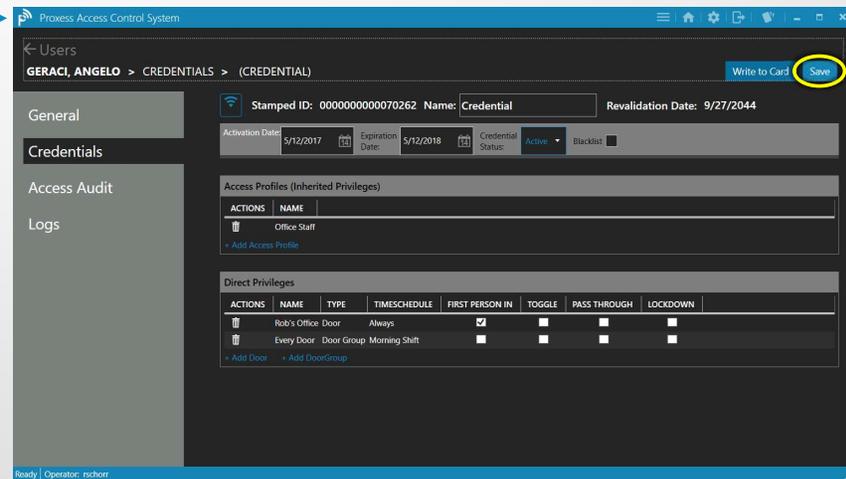
Click the dropdown arrow to select the first individual Door and then the Time Schedule for the credential to have access to it. Check the appropriate boxes to allow this credential to have First Person In rights, Use this door in a Toggle function, Pass Through\Enter a door that is in Lockdown mode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



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



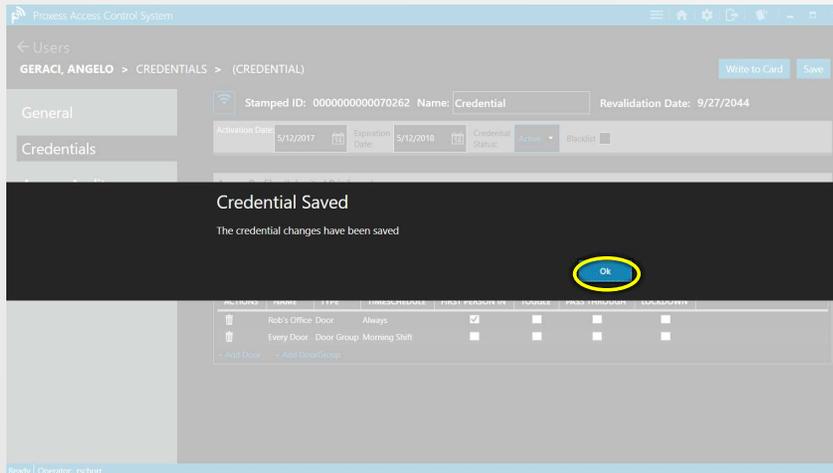
Repeat this procedure for all the additional doors and Door Groups that this credential will have access to and then, as long as the new card is on the enrollment reader, click "Write to Card".



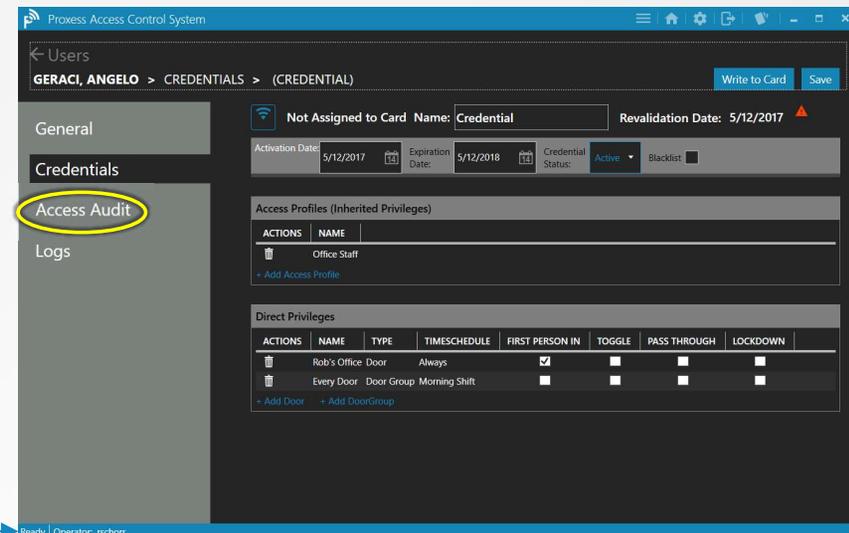
The "Stamped ID" of the card will now be shown towards the top of the screen, along with the selected Revalidation Date. Click "Save" to complete the process. The card programming process is now complete.



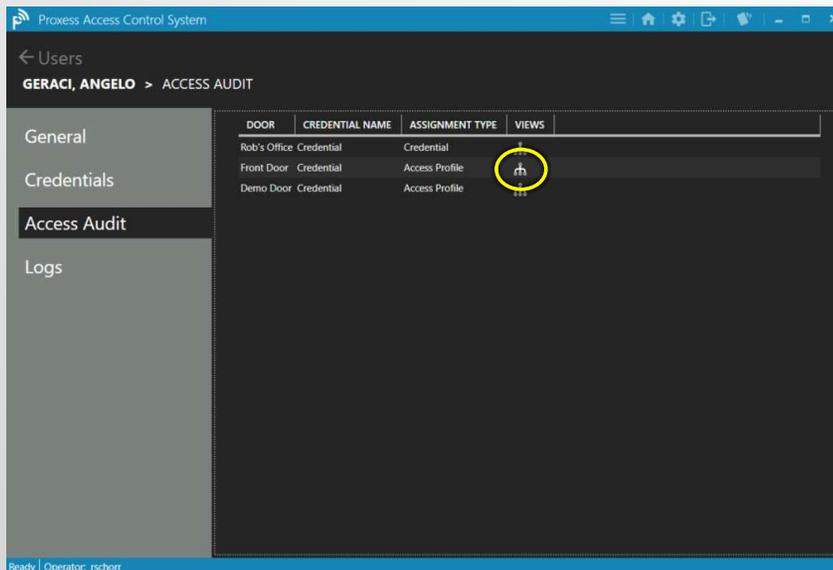
Adding New Users & Credentials - 5



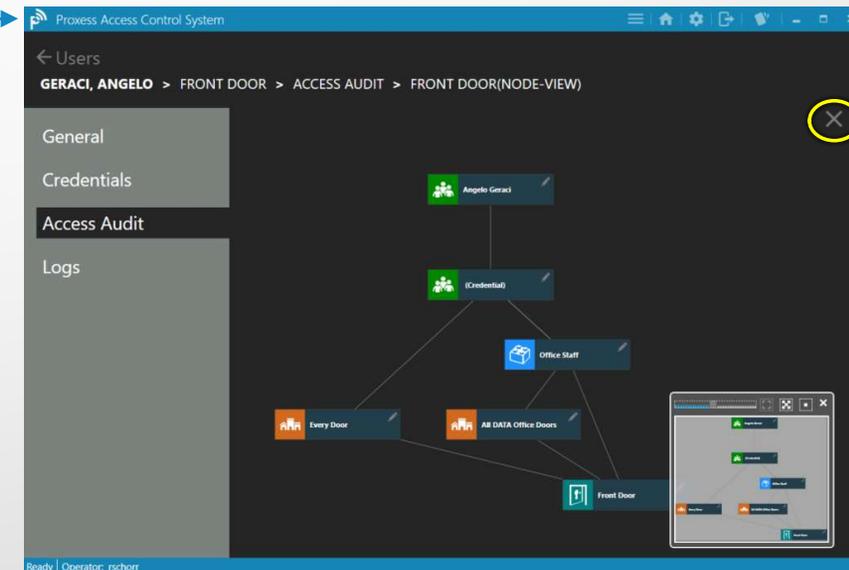
From the previous screen, this verification screen appears. Click "OK".



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

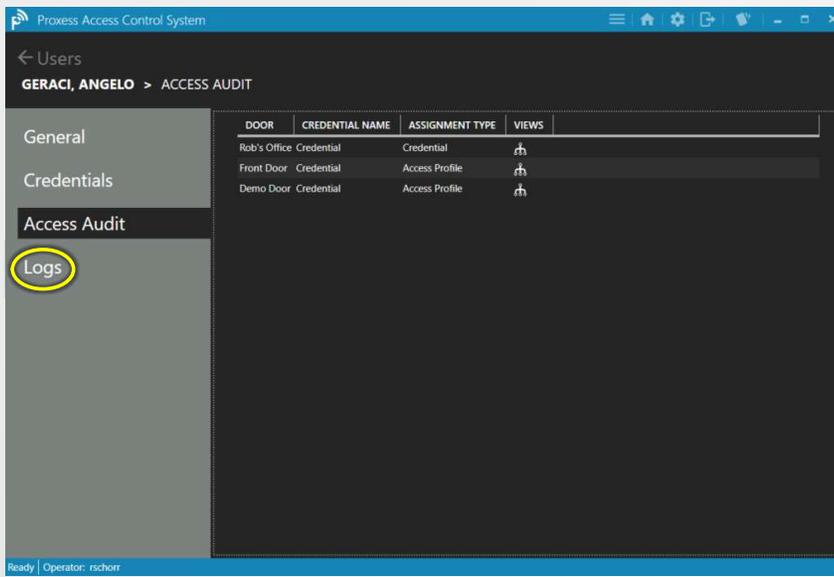


Each of the individual doors this Cardholder\User has access to will appear in this list. For any of the doors, click on its "Views" icon.

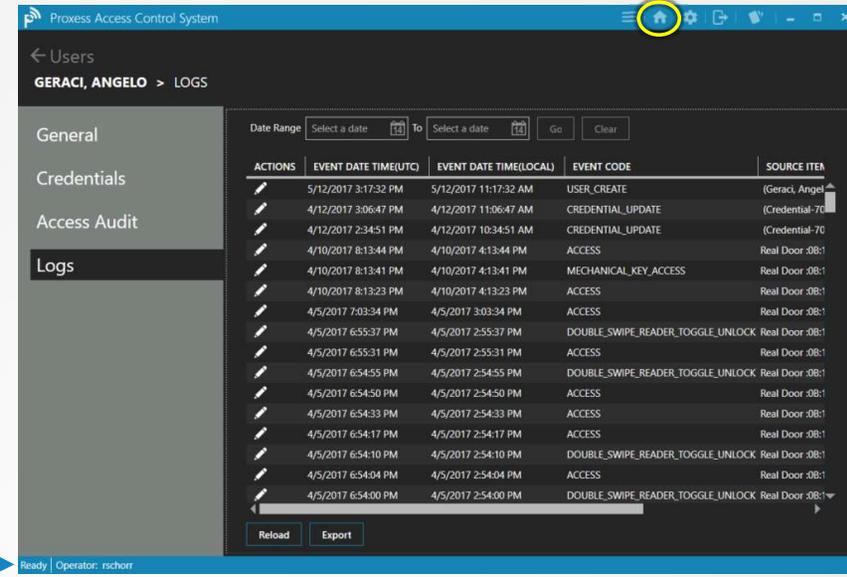


This Access Audit view shows the relationship between the cardholder and their credentials and the door selected on the previous screen.

The insert on the bottom right of the screen allows you to see the entire relationship tree and the slide bar at the top of this insert can be moved to widen or narrow the main screen view. Click "X" in the top right to close this view and return to the list of doors.

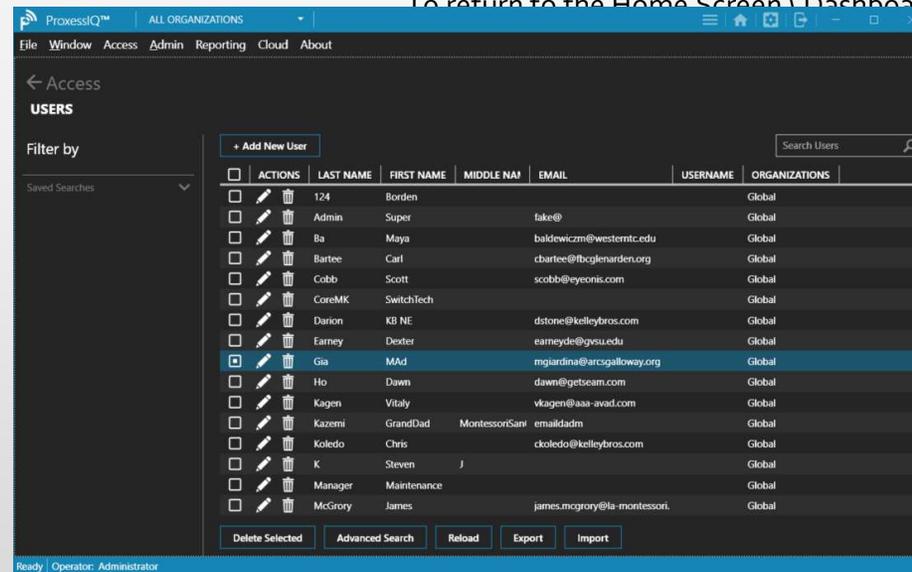


For a list of all of the recorded Events for a User, click "Logs".



The Log lists every stored Event from that door. This list may be Exported as an Excel file by clicking the "Export" button at the bottom.

This list may be scrolled and may also be searched and shortened, by selecting a "Date Range" from the top of the page. Again, the resulting list may be Exported by clicking the "Export" button. To return to the full list of Users, click "Users" at the top left. To return to the Home Screen / Dashboard, click the Home icon





Advanced Searches of Users

Adding New Users & Credentials - 7

The screenshot shows the ProxessIQ interface for managing users. The 'USERS' section is active, displaying a table of user records. The 'Advanced Search' button at the bottom of the table is highlighted with a yellow circle.

ACTIONS	LAST NAME	FIRST NAME	MIDDLE NAME	EMAIL	USERNAME	ORGANIZATIONS
<input type="checkbox"/>	124	Borden				Global
<input type="checkbox"/>	Admin	Super		fake@		Global
<input type="checkbox"/>	Ba	Maya		baldewicz@westerntc.edu		Global
<input type="checkbox"/>	Bartee	Carl		cbartee@fbcglenarden.org		Global
<input type="checkbox"/>	Cobb	Scott		scobb@eyeonis.com		Global
<input type="checkbox"/>	CoreMK	SwitchTech				Global
<input type="checkbox"/>	Darion	KB NE		dstone@kelleybros.com		Global
<input type="checkbox"/>	Earney	Dexter		earneyde@gvsu.edu		Global
<input checked="" type="checkbox"/>	Gia	MAd		mgjardina@arcsalloway.org		Global
<input type="checkbox"/>	Ho	Dawn		dawn@getseam.com		Global
<input type="checkbox"/>	Kagen	Vitaly		vkagen@aaa-avad.com		Global
<input type="checkbox"/>	Kazemi	GrandDad	MontessoriSari	emaildadm		Global
<input type="checkbox"/>	Koledo	Chris		ckoledo@kelleybros.com		Global
<input type="checkbox"/>	K	Steven	J			Global
<input type="checkbox"/>	Manager	Maintenance				Global
<input type="checkbox"/>	McGrory	James		james.mcgrory@la-montessori.		Global

Within each User record

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

The screenshot shows the 'Advanced Search' dialog box. The 'Last Name' field and the 'Contains' dropdown menu are highlighted with yellow circles. The dialog is open over the user list.

The screenshot shows the 'Advanced Search' dialog box with the dropdown menu open. The menu options are: 'Contains', 'Is equal to', 'Starts with', and 'Ends with'. The 'Contains' option is selected. The dialog is open over the user list.



Advanced Searches of Users

Within each User record

Adding New Users & Credentials - 8

ACTIONS	LAST NAME	FIRST NAME	MIDDLE NAME	EMAIL	USERNAME	ORGANIZATIC
<input type="checkbox"/>	124	Borden				Global
<input type="checkbox"/>	Admin	Super		fake@		Global
<input type="checkbox"/>	Ira	Maya		baldewicz@westernc.edu		Global
<input type="checkbox"/>	Bartee	Carl		cbartee@fbcglenarden.org		Global
<input type="checkbox"/>	Cobb	Scott		scobb@eyeonis.com		Global
<input type="checkbox"/>	CoreMK	SwitchTech				Global
<input type="checkbox"/>	Darion	Nelly		dstone@kb.com	Science Department	Global
<input type="checkbox"/>	Earney	Dexter		eameyde@nyu.edu		Global

ACTIONS	LAST NAME	FIRST NAME	MIDDLE NAME	EMAIL	USERNAME	ORGANIZATION
<input checked="" type="checkbox"/>	Darion	Nelly		dstone@kb.com	Science Department	Global

Save Advanced Search

Search Name
Department Search

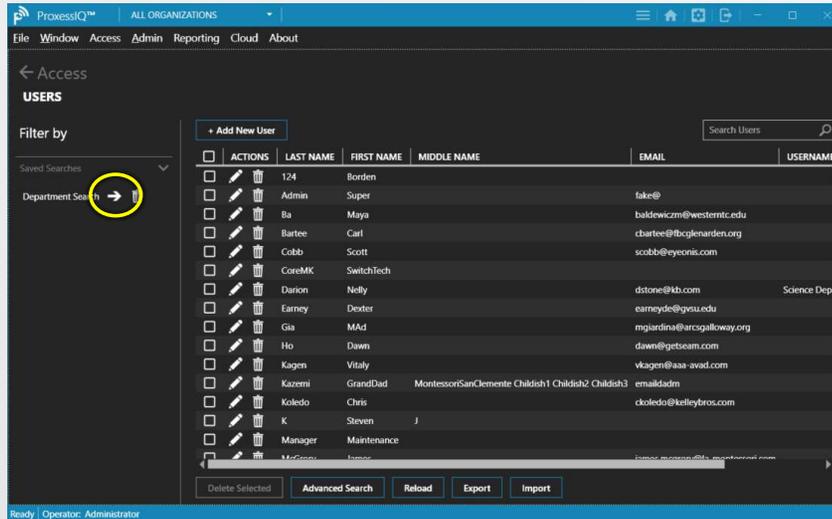
Department Search →

X

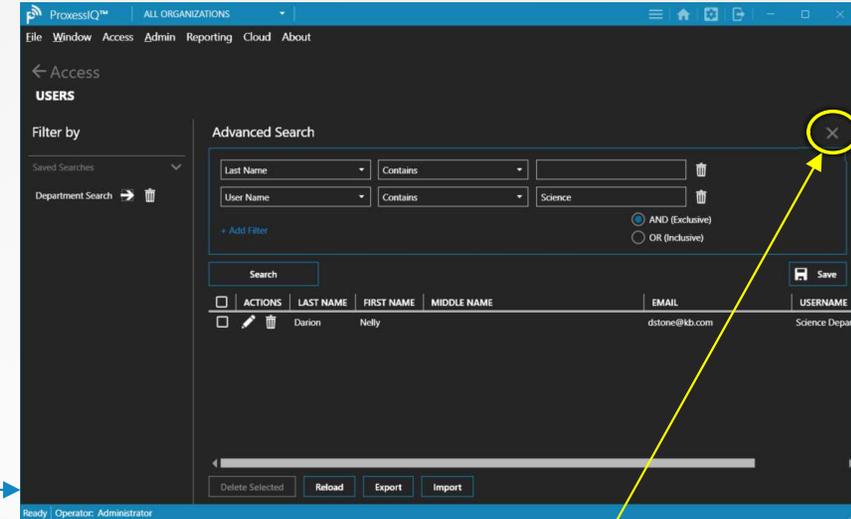
Name this search for your future use and click "OK".
Your new custom search will now appear in this list, for later execution by this and other operators.
When you have completed your Search, you must click "X" to bring you back to the full list of Users, or the User menu will continue to only show those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



Advanced Searches of Users



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.



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,

From: paul.hevesy@proxess.com <paul.hevesy@proxess.com>
Date: Thursday, May 11, 2023 at 5:56 PM
To: Robert Schorr <rob.schorr@proxess.com>
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:



IMPORTANT: Once you download the app to your phone please **DO NOT TAKE** 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.

You have been invited to Proxess Mobile by Proxess Texas Demo

Proxess (no-reply) <no-reply@proxess.com>
To: sample@proxess.com

Today at 4:41 PM

Proxess

Invitation

You have been invited to use Proxess Mobile by Proxess Texas Demo. Proxess Mobile enables users to use their phones as access credentials.

1. Download the Proxess Mobile app from the appropriate app store.



2. Once the app is installed, open the link below on your mobile device.

Here are some things to note:

- You must use this email address to retrieve your credentials. If you need to use a different email address you must have the ACS administrator change your address in the system.
- The link below expires in 30 minutes and can only be used once.
- You must be able to click the link from the mobile device running the mobile credential app for authentication to work.

Don't worry, you can request a new email to be sent from the app. If you uninstall the app you will need to request another link.

[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"

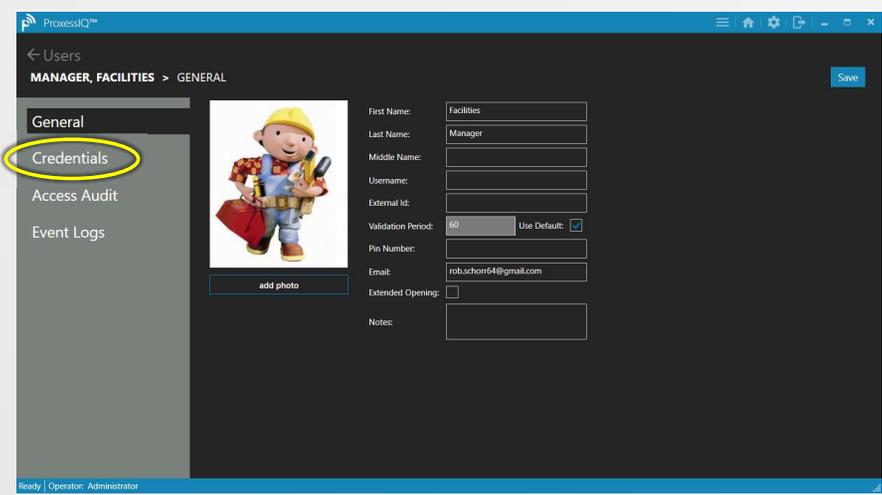
This will authenticate your mobile key by taking you directly to the Proxess Mobile Key app on your phone.

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

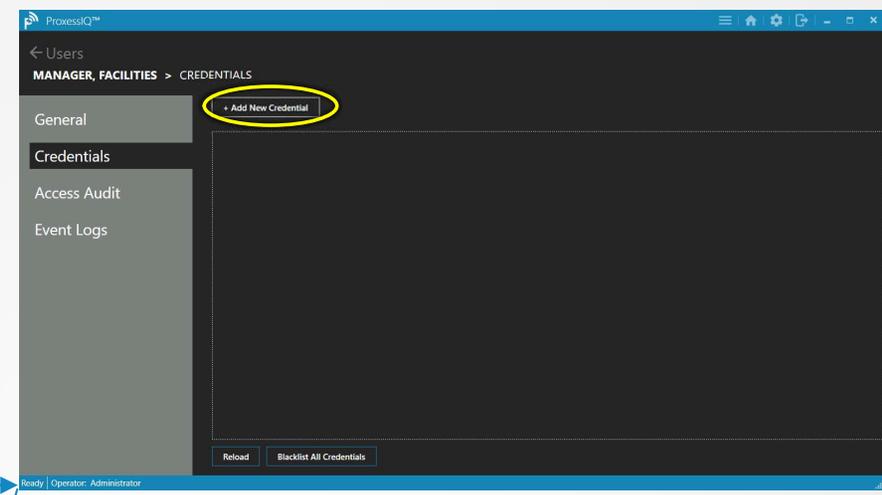
NOTE: You can also watch a [How To Download Your Proxess Mobile Credential For The 1st Time video here](#)



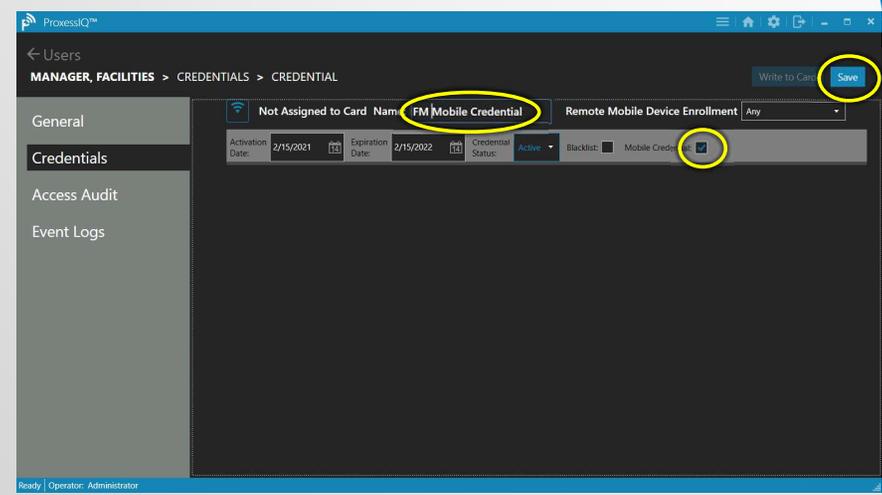
Adding New Users & Mobile Credentials - 2



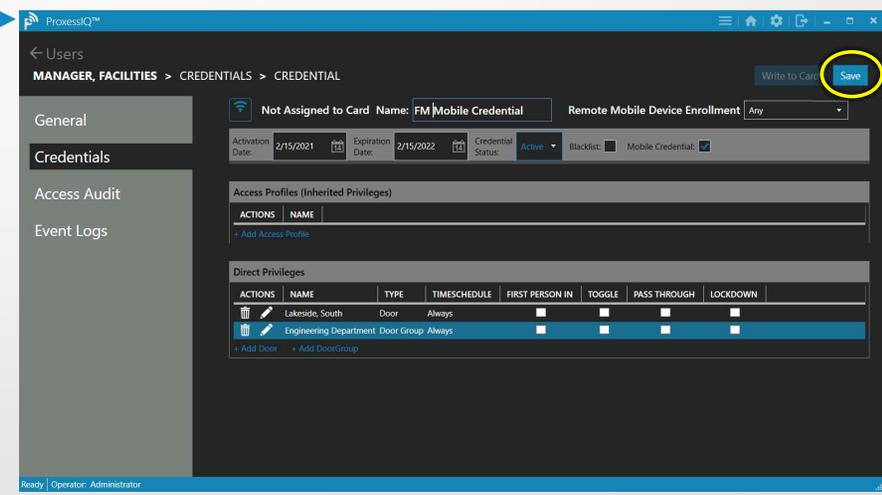
Now that the new user has been created and saved, we can assign a card\ credential to them. This can be done now, or anytime in the future, by returning to their record, going to the Users module and clicking on the edit icon for their name. For now, click "Credentials" to proceed.



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



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"

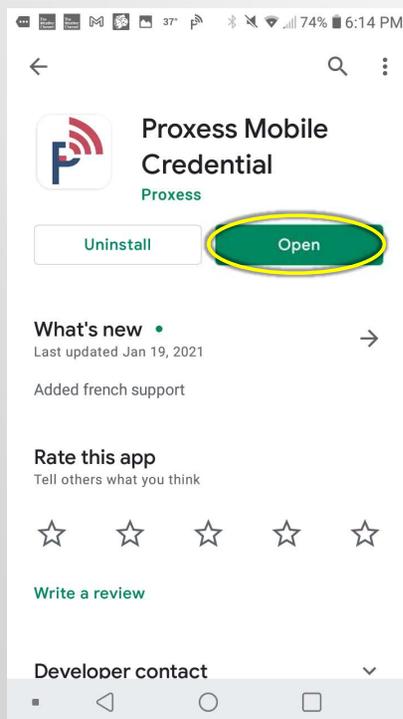
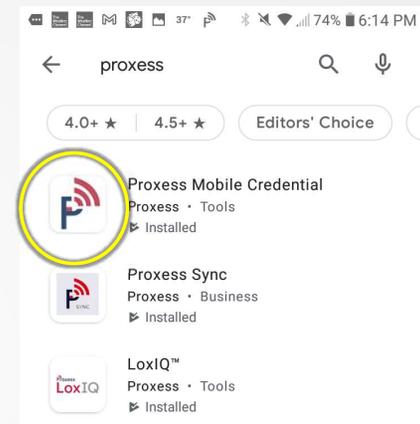
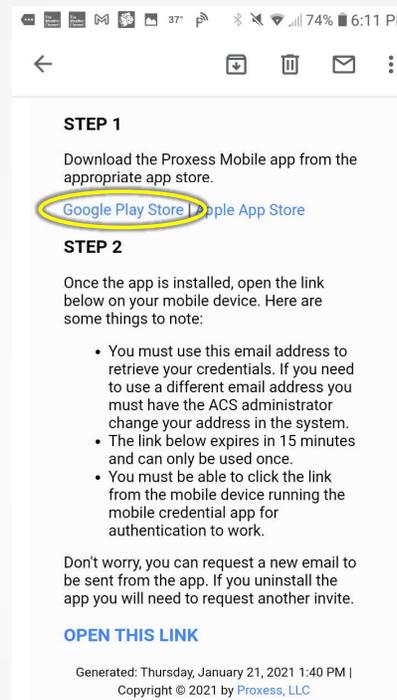
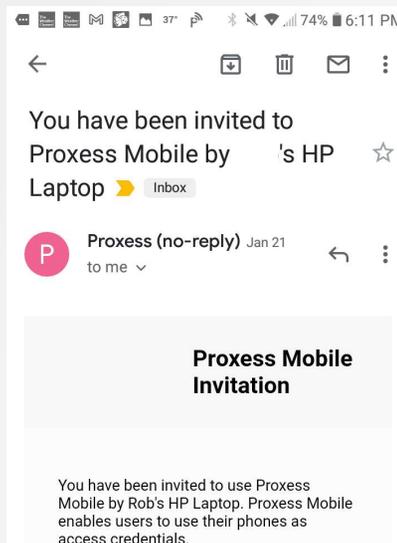
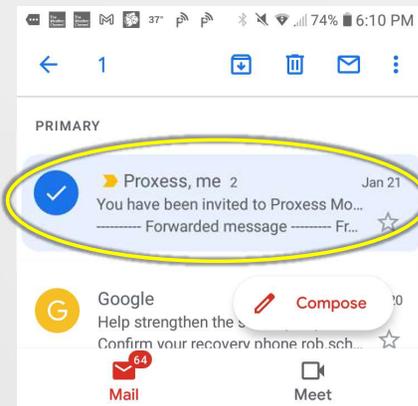


You may now assign Privileges (a.k.a. access rights) for this Mobile Credential, as defined in the previous section. In this case we will assign the Privilege for this credential to access the Door Group Engineering Department, during the Time Schedule Always and the individual Door Lakeside, South , 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.



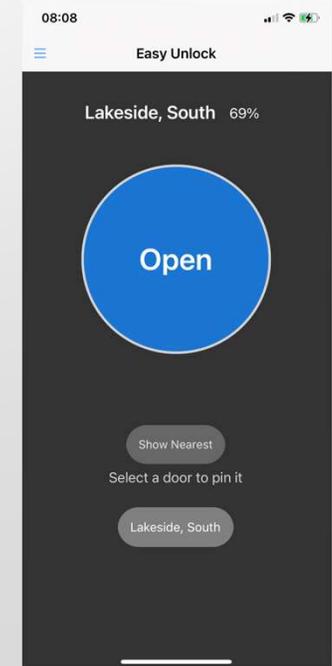
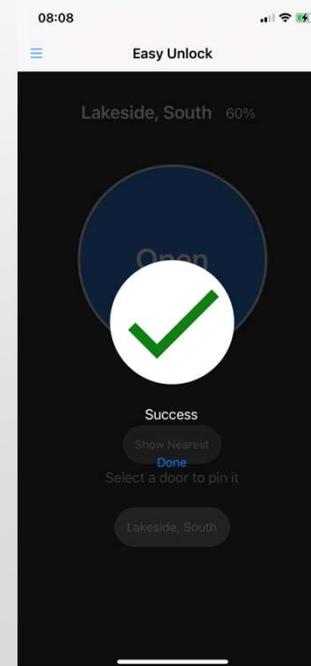
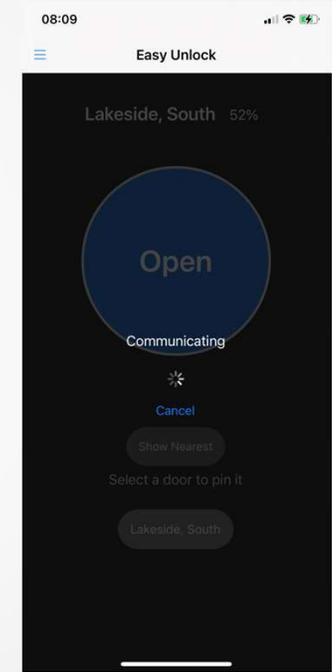
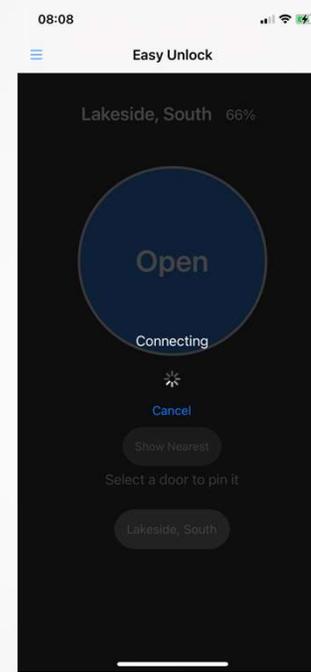
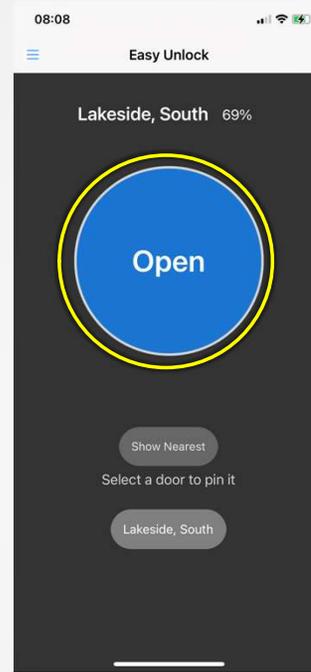
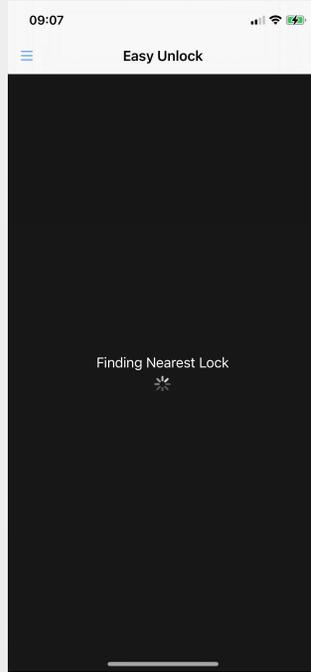
Adding New Users & Mobile Credentials - 3

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.





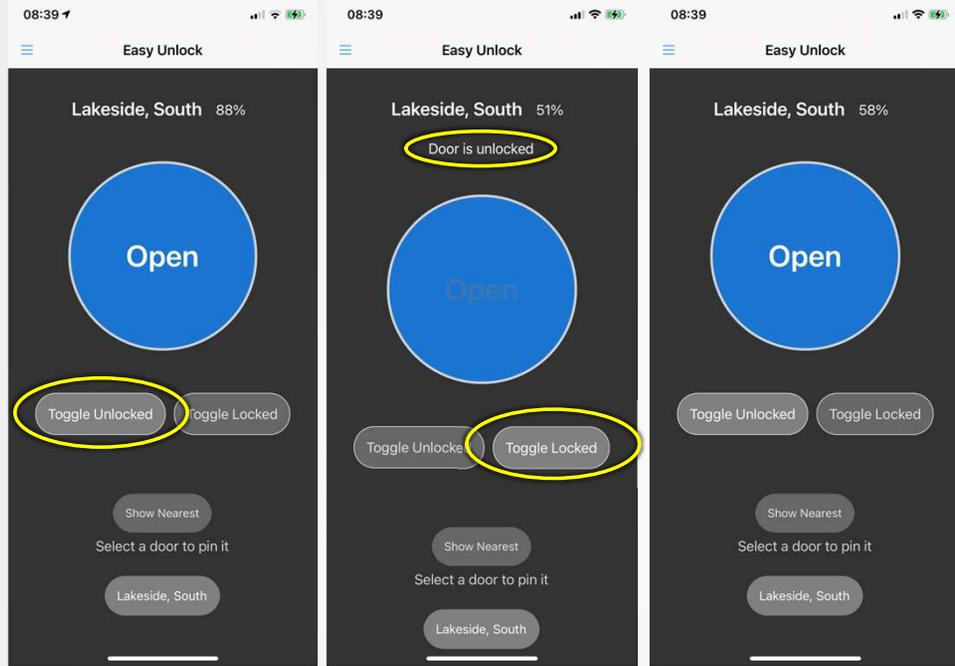
The Mobile Credential app will open in "Easy Unlock" mode, where it will automatically find and display the door with the greatest signal strength (usually the closest door as well). Tap the "Open" button for the door you wish to access and it will unlock. For the best user experience, open your app 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.





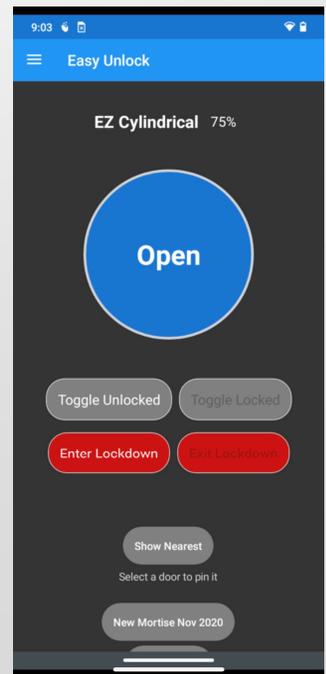
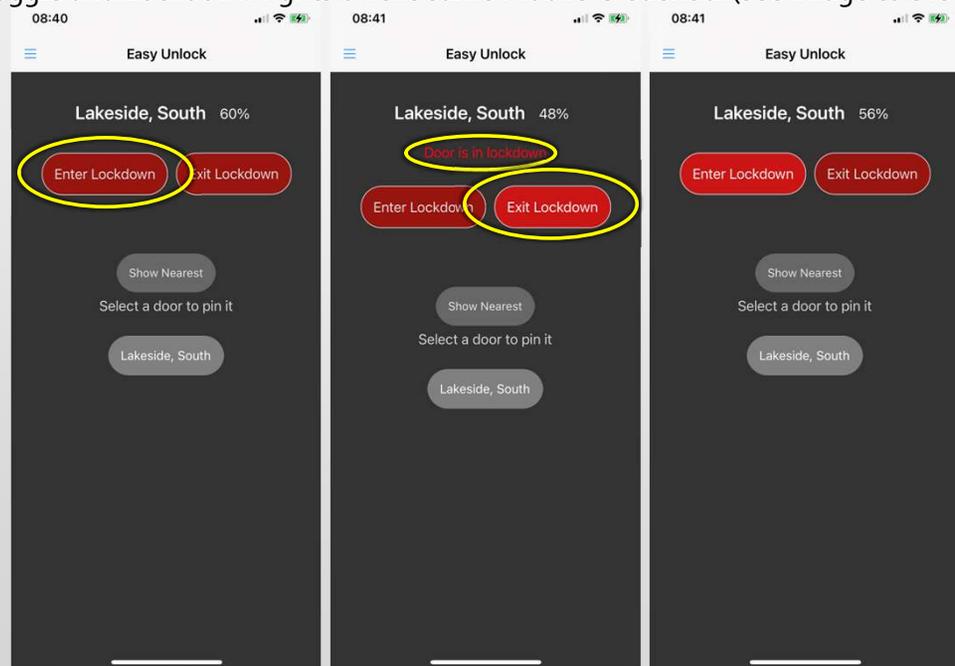
When creating a Mobile Credential, you may assign Toggle rights. In this case, the "Toggle Unlocked" and "Toggle Locked" buttons will display. Toggled locks remain Unlocked (no credential required to enter) until either Toggled Locked or until the next Time Schedule occurs requiring the lock to be in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

When toggled into the Unlocked mode, the mobile credential will not display the "Open" button. Once the lock is toggled back to the Locked mode the "Open" button will again display.



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).

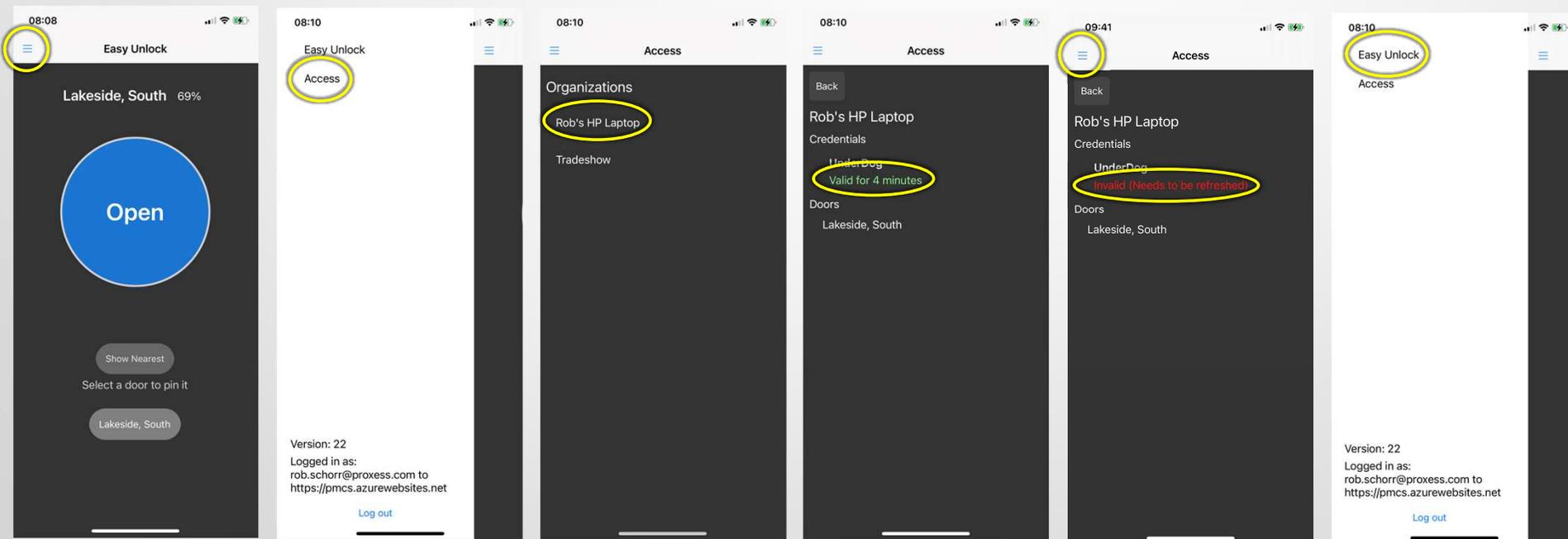
When the lockset has entered the Lockdown mode, a note in red will display. Once removed from the Lockdown mode the note will be removed.

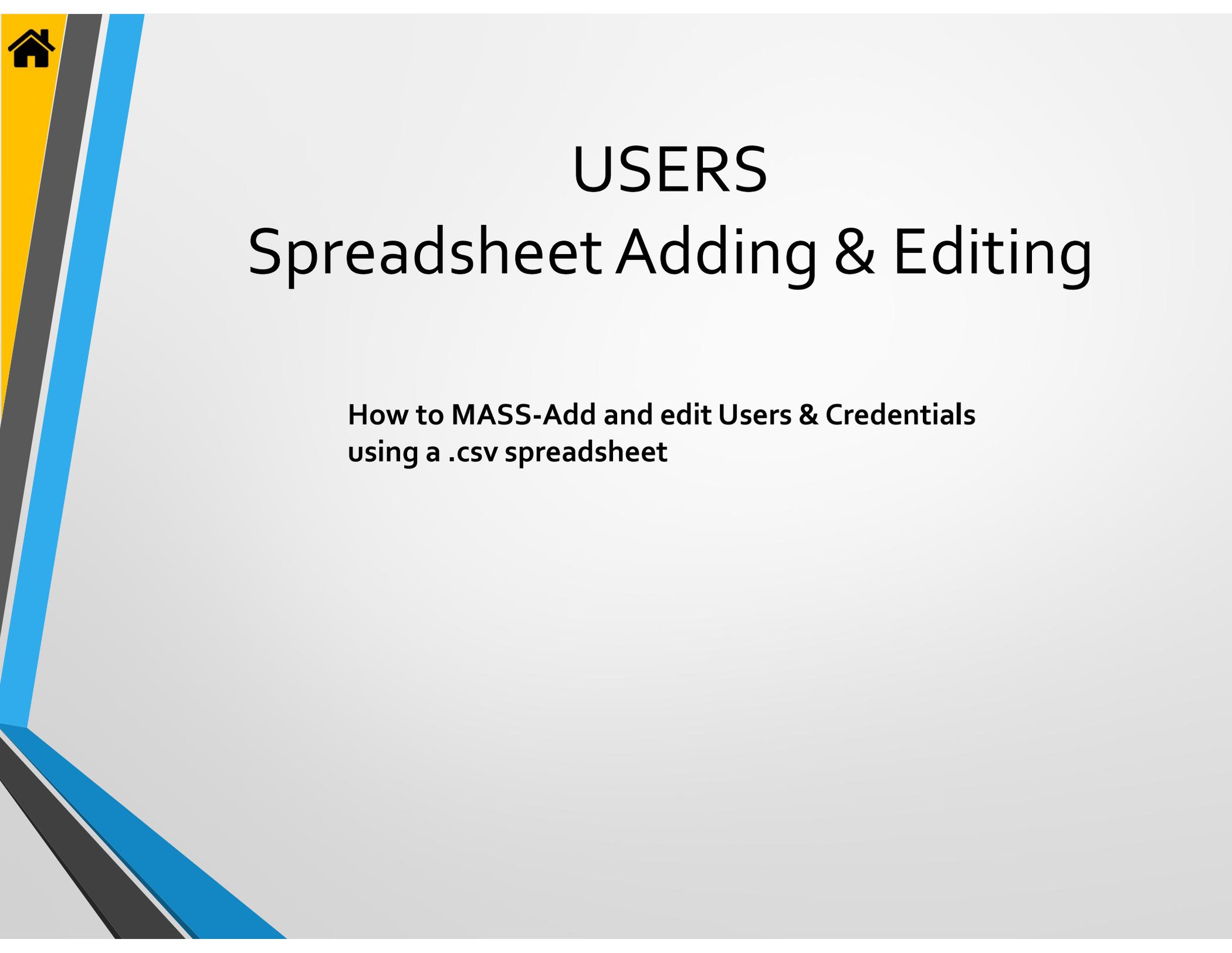




By default, the Mobile Credential will open in the "Easy Unlock" mode. In this mode, the app will automatically locate and display the door with the greatest signal strength... Tap the hamburger icon in the top left to bring up the mode menu. Click on the "Access" mode and all of the Organizations that 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.



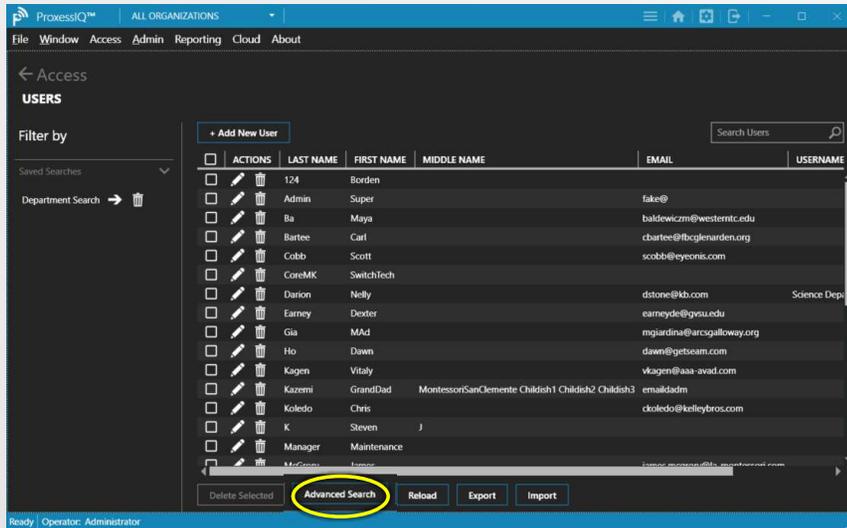


USERS

Spreadsheet Adding & Editing

**How to MASS-Add and edit Users & Credentials
using a .csv spreadsheet**

Mass Adding and Editing Users using a .csv spreadsheet



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

Import List

ExternalId	FirstName	LastName	MiddleName	UserName	Email	PinCode	ExtendedOpening	Notes	OrganizationGuid	ShareWithChildrenOrgs	CredentialName	CredentialActivationDateTime	CredentialExpirationDateTime	EnableMobileCredential	AccessProfileList	CredentialPrintedNumber	CredentialStatus	BlockList	Removal	ForceUpdate	ImportStatus
	Angelica	Altadena			tadenala@hp.com		FALSE		00000000-0000-0000	FALSE	Tom Mobile Tom Lockdown	5/18/2023 0:00	5/18/2026 0:00	TRUE	Bldg Principal ...		Other	FALSE	FALSE	FALSE	ReadyForImport
	Johnathan	Fitzpatrick			jfitz@stateu.com		FALSE		00000000-0000-0000	FALSE	John Fob John Mobile	5/18/2023 0:00	5/18/2026 0:00	TRUE	Frosh Dorm Gym Bio		Other	FALSE	FALSE	FALSE	ReadyForImport
	Johnathan	Weismüller			johnnywims@k12.va.us		FALSE		00000000-0000-0000	FALSE	Credential	5/18/2023 0:00	5/18/2026 0:00	TRUE			Other	FALSE	FALSE	FALSE	ReadyForImport
	Claudia	Caudillo			claudia.caudillo@gmail.com		FALSE		00000000-0000-0000	FALSE	Credential	5/18/2023 0:00	5/18/2026 0:00	TRUE			Other	FALSE	FALSE	FALSE	ReadyForImport
	Lorena	Veracruz			veracruz@yahoo.com		FALSE		00000000-0000-0000	FALSE	Credential	5/18/2023 0:00	5/18/2026 0:00	TRUE			Other	FALSE	FALSE	FALSE	ReadyForImport
	Violet	Morrison			v.morrison@proxess.invalid		FALSE		00000000-0000-0000	FALSE	Credential	01/01/0001 00:00:00	01/01/0001 00:00:00	FALSE			Other	FALSE	FALSE	FALSE	ReadyForImport

Export List

ExternalId	Last Name	First Name	Middle Name	Email	Username	Organizations	H	I	J	K
	124	Borden				Global	Notes	PinCode	ExtendedOpening	
	Admin	Super		fake@		Global			FALSE	
684f1dca-a3c0-4	Altadena	Angelica		tadenala@hp.com		Global			FALSE	
	Ba	Maya		baldewiczm@westerntc.edu		Global			FALSE	
	Bartee	Carl		cbartee@fbcglenarden.org		Global			FALSE	
368c6807-55d9-4	Caudillo	Claudia		claudia.caudillo@gmail.com		Global			FALSE	
	Cobb	Scott		scobb@eyeonis.com		Global			FALSE	
	CoreMK	SwitchTech				Global			FALSE	



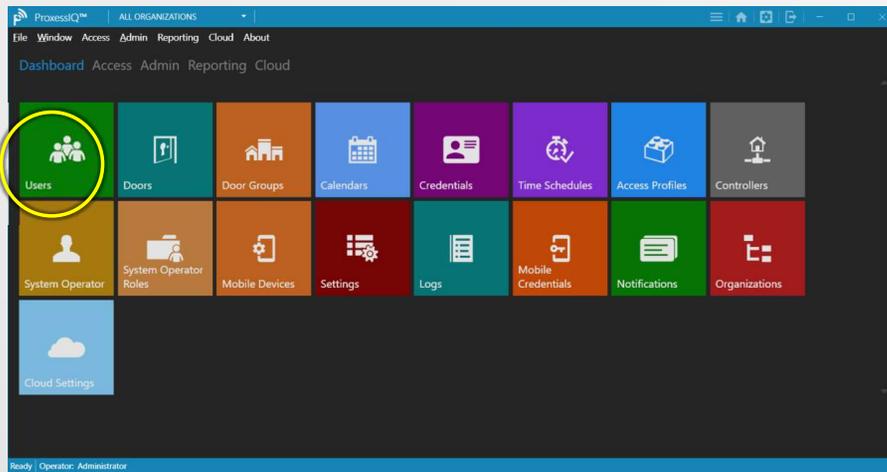
USERS

Encoding & Wiping Cards/Fobs/
Wristbands/Stickers

with the **ProxessIQ™** Software

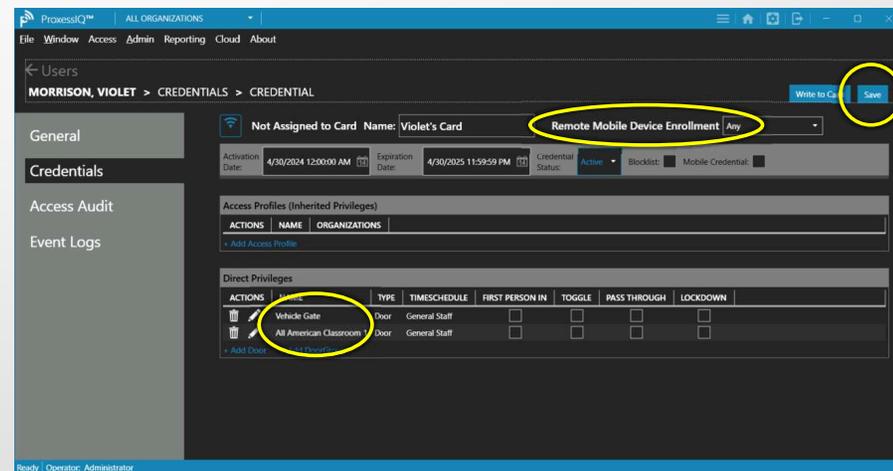
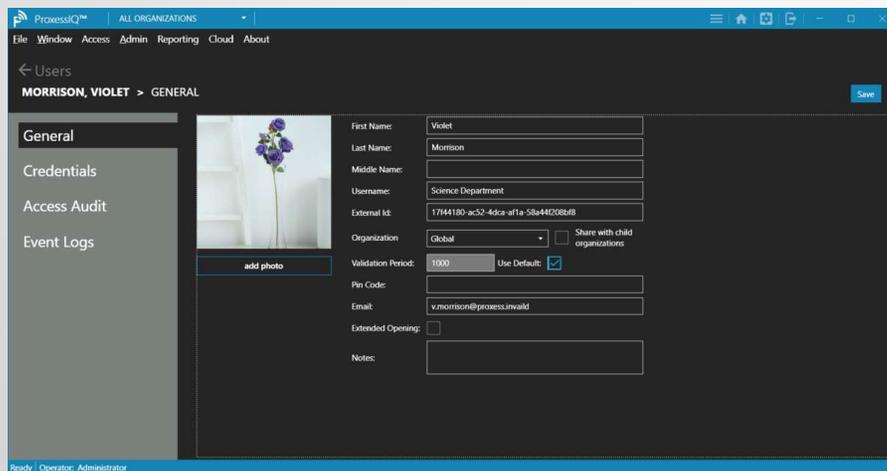


Encoding Physical Credentials using the ProxessIQ™ Software



A credential (card, keyfob, sticker, watchband) must first be created in the software and then it can be encoded with the software, by plugging an 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.

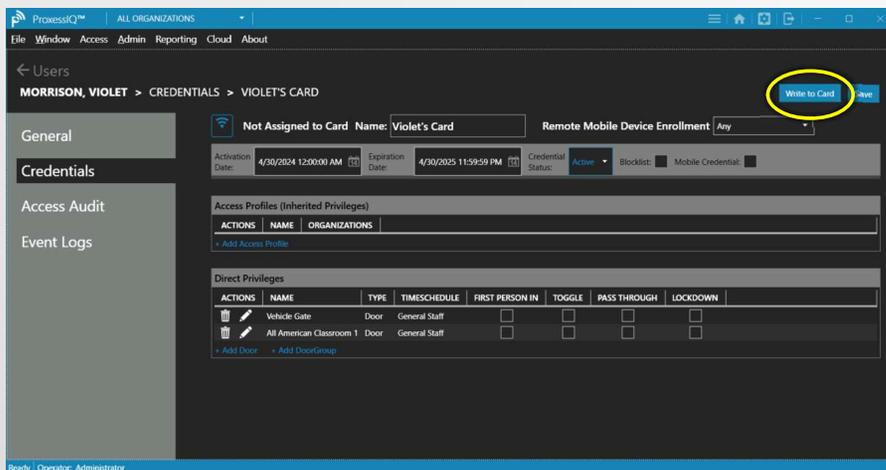


Encoding Cards with ProxessIQ™ - 1

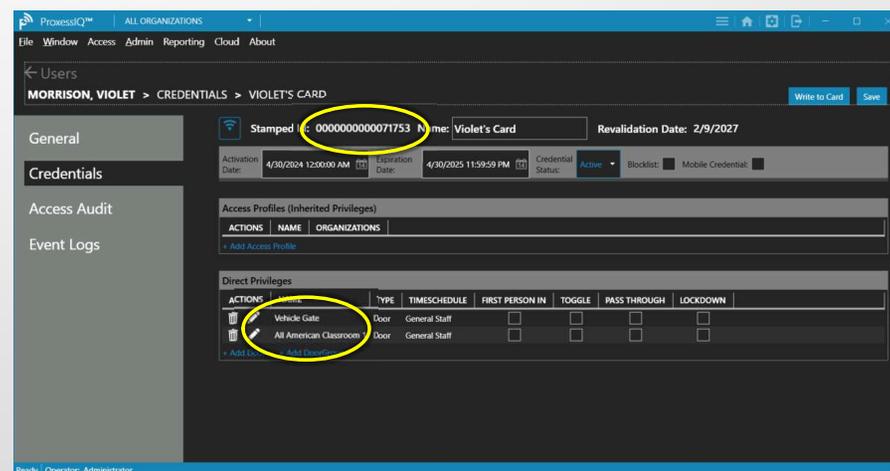


NOTES for SUCCESSFUL CREDENTIAL ENCODING, READING & DELETING

- 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.

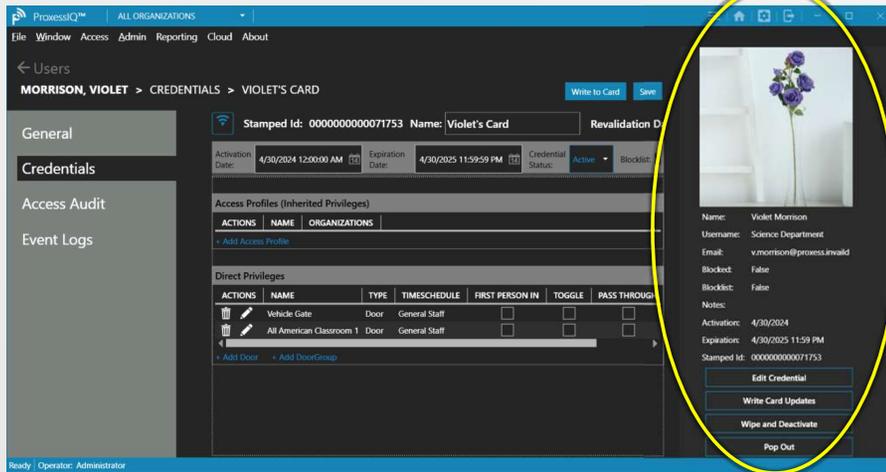


- If you are certain the credential (card/keyfob/sticker/watch) to encode has not already been encoded, then click on "Write to Card"
- Immediately place and hold the credential on the ENR until the blue LED appears and the screen to the right appears
- This shows the credential has been encoded with 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.



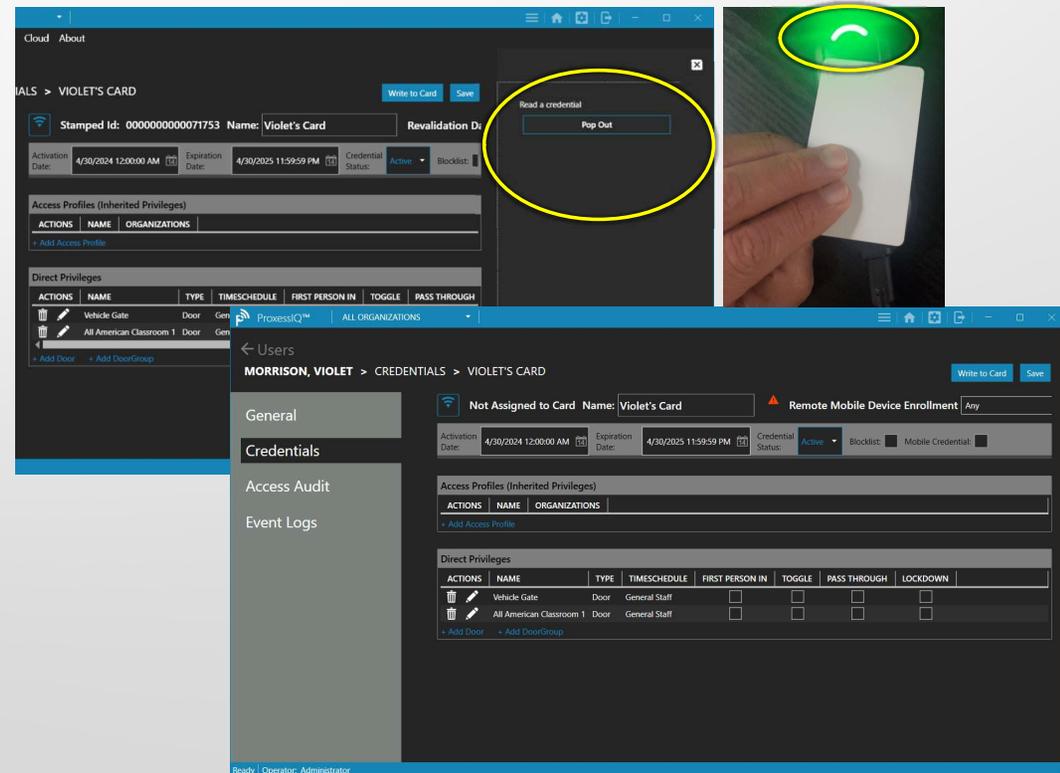
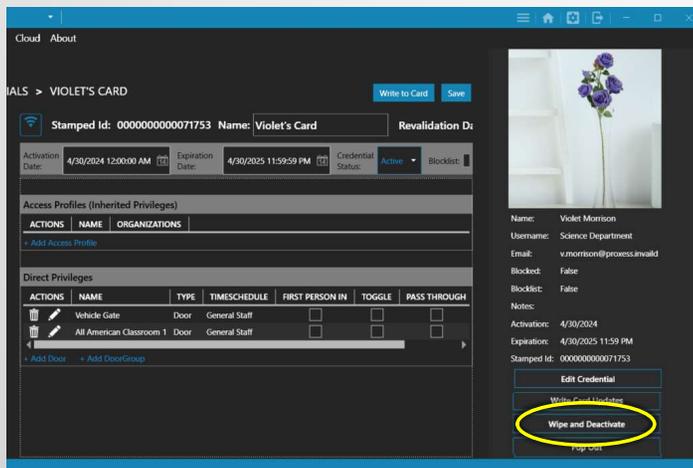


Verifying and Deleting (Wipe) a Credential

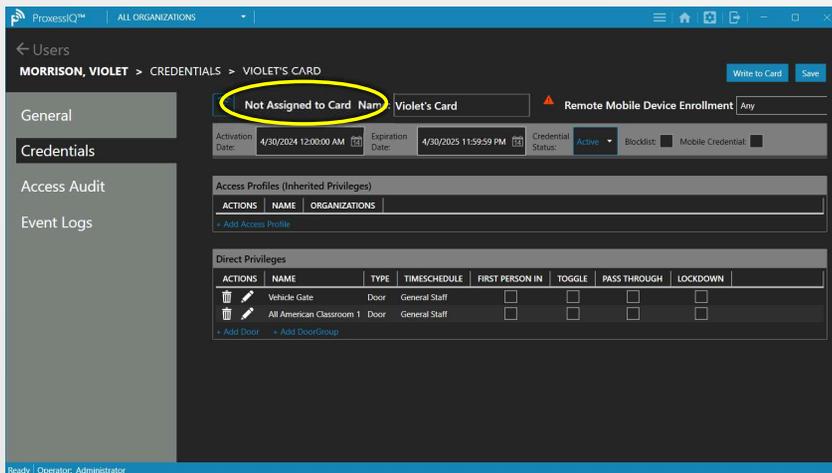


To Wipe/Delete a credential, or if you are uncertain if the credential (card/keyfob/sticker/watch) to encode has already been encoded:

- 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.

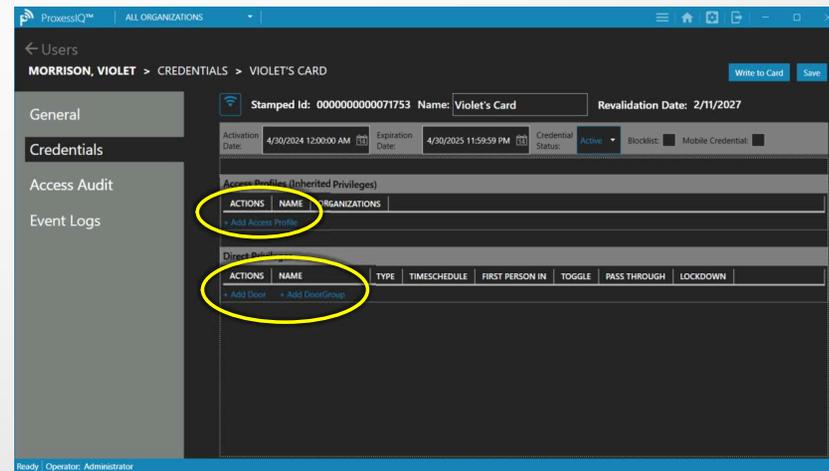
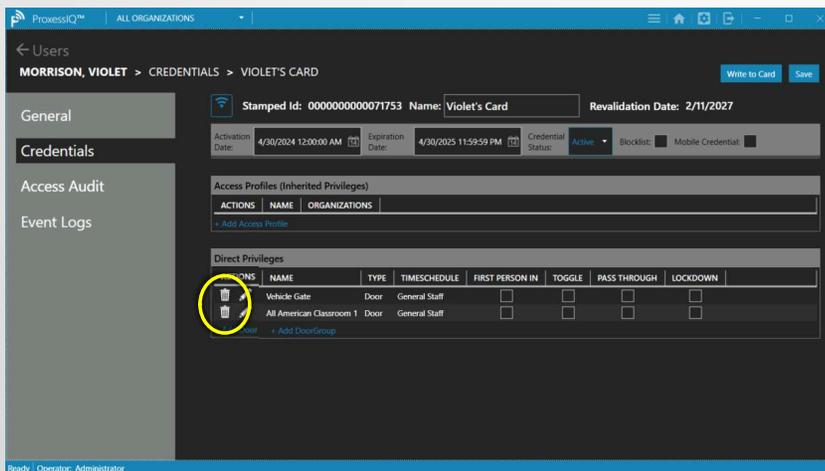


Verifying and Deleting (Wipe) a Credential



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

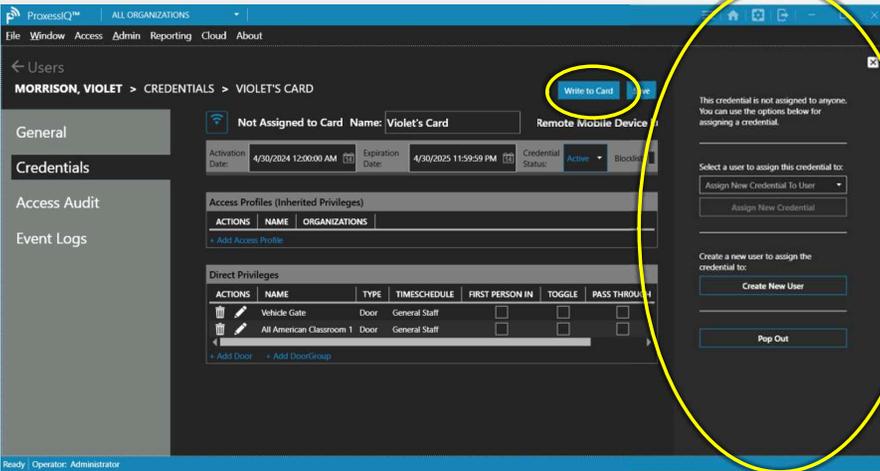


It is always better to first delete the rights for a credential, by clicking on the Trash Can icons, leaving the credential with no rights.

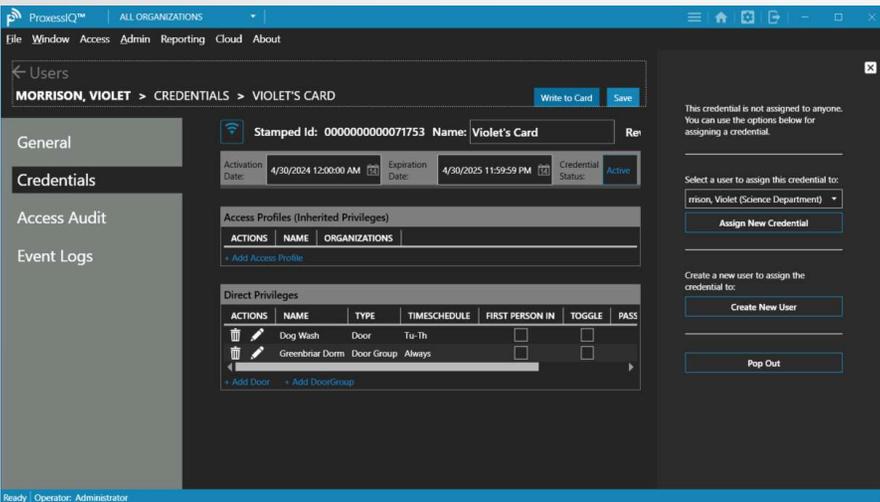
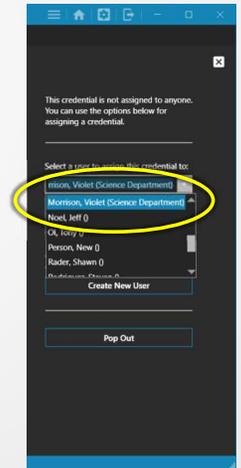
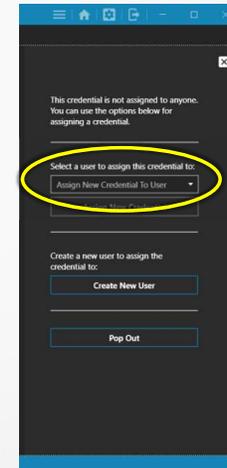
If the card is ever presented at an online reader, it will automatically be updated to have No door entry rights and will not be allowed into the door.

- 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?



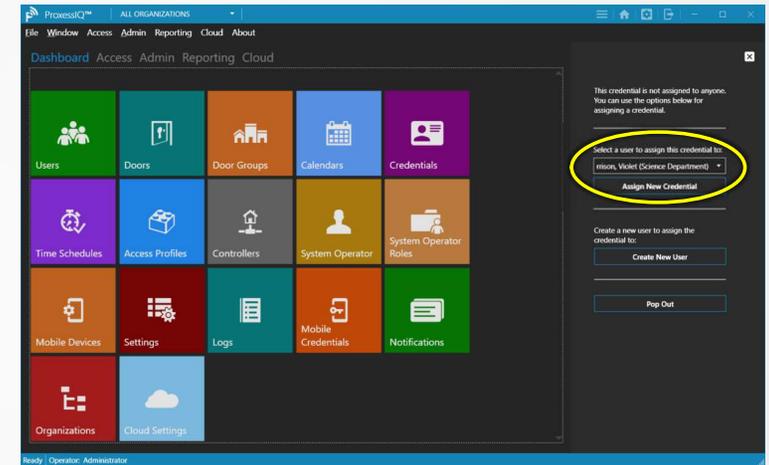
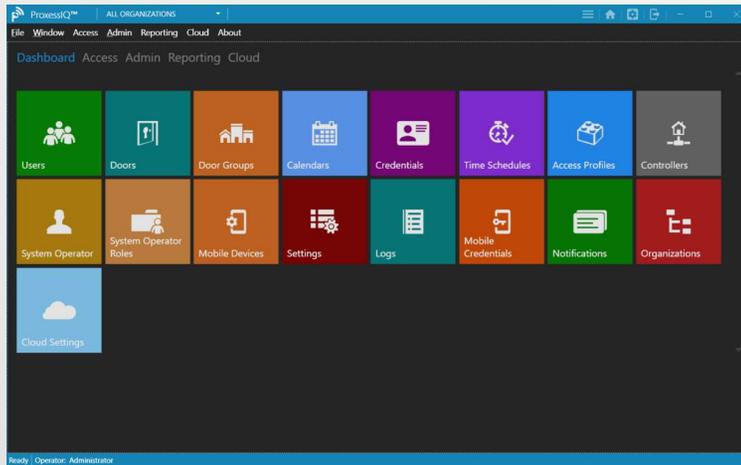
- If you are uncertain if the credential (card/keyfob/sticker/watch) to encode has already been encoded, then first place and hold the credential on the ENR until the blue LED appears and the above pop-up window appears.
- Remove the card from the ENR.
- In this case, this card is not assigned to anyone
- 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.





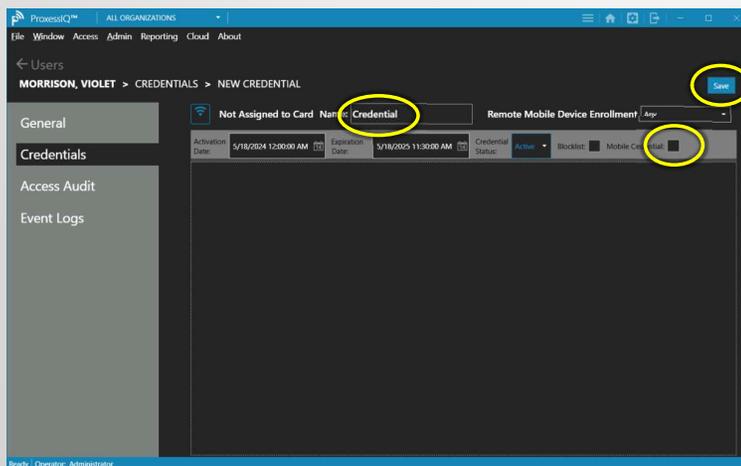
Another way to Encode a Card

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.

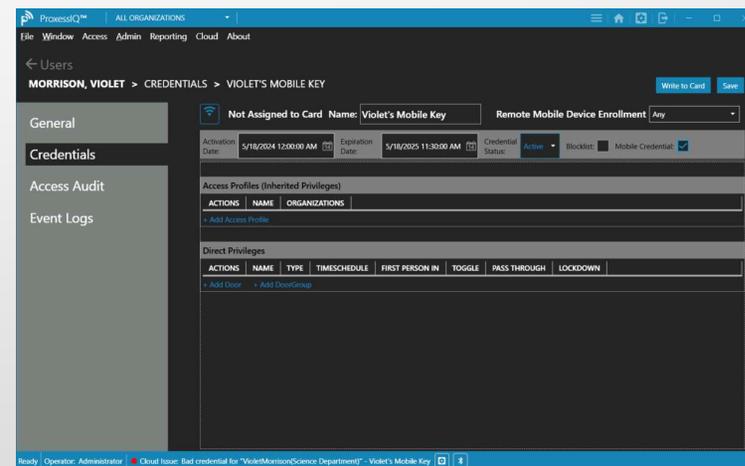


From any screen in the system, take an unencoded card and place it on to the ENR. The light will turn blue and the pop-up window will appear.

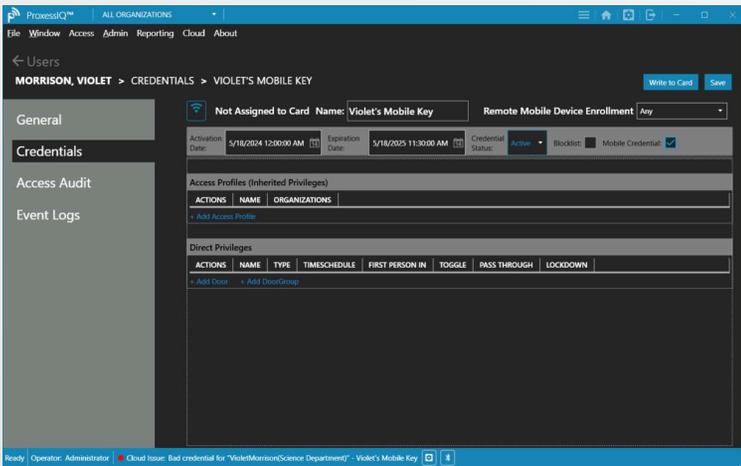
Select a User's name that you have already entered into the system and click "Assign New Credential".



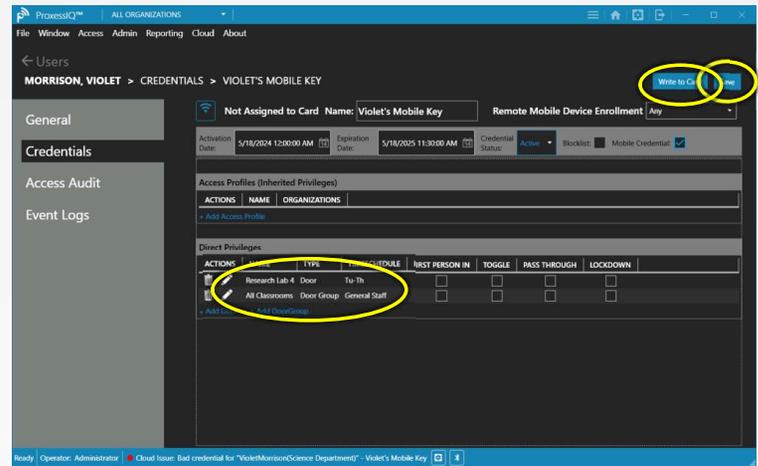
The Add New Credential window opens. Optionally add a Name for it, in this case check the "Mobile Credential" box and click "Save".



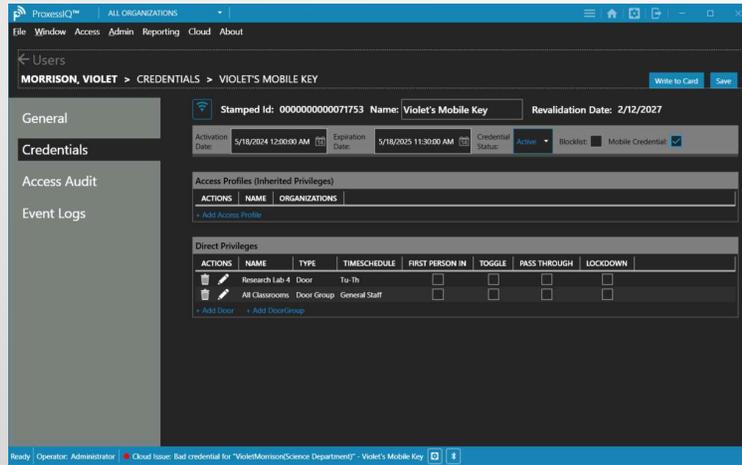
Enter the information for their new credential (a mobile phone key in this case) and add their access rights as described in previous sections.



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

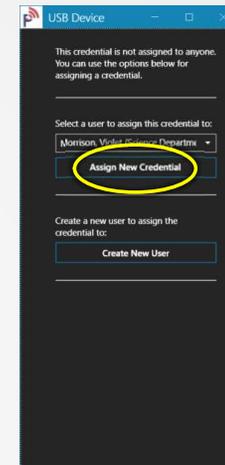
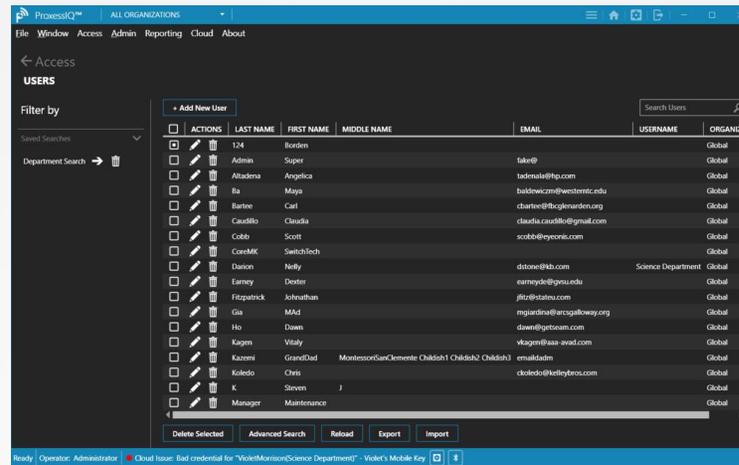
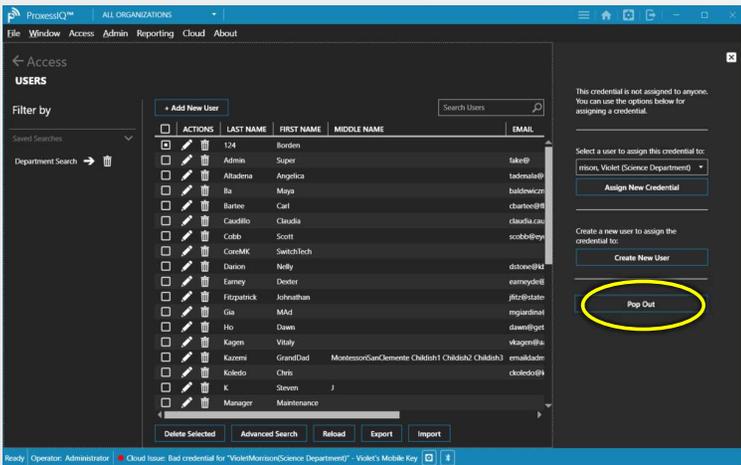


Select their Door and Door Group Privileges. Remember to keep all credentials away from the ENR until this point. Now click "Save" and then click "Write to Card".

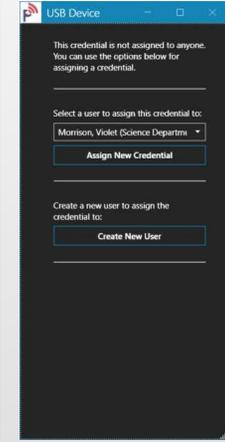
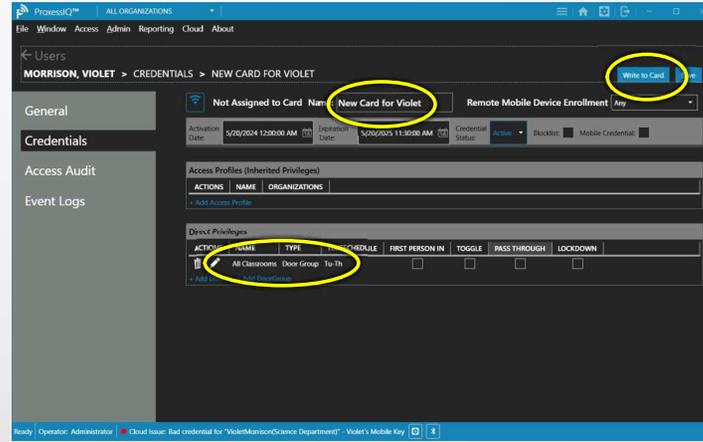
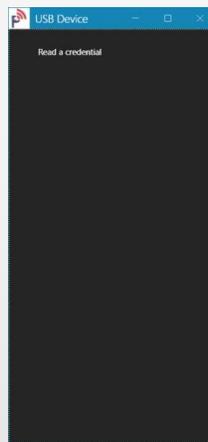
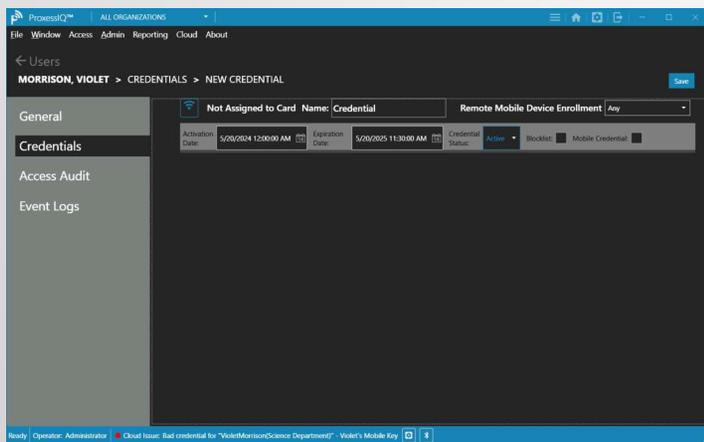


Promptly place and hold a credential on the ENR (enrollment reader) until it beeps and it will have been encoded.

Pop-Out Window: Another way to Encode a Card



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 then click "Write to Card" and the card information will display.

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



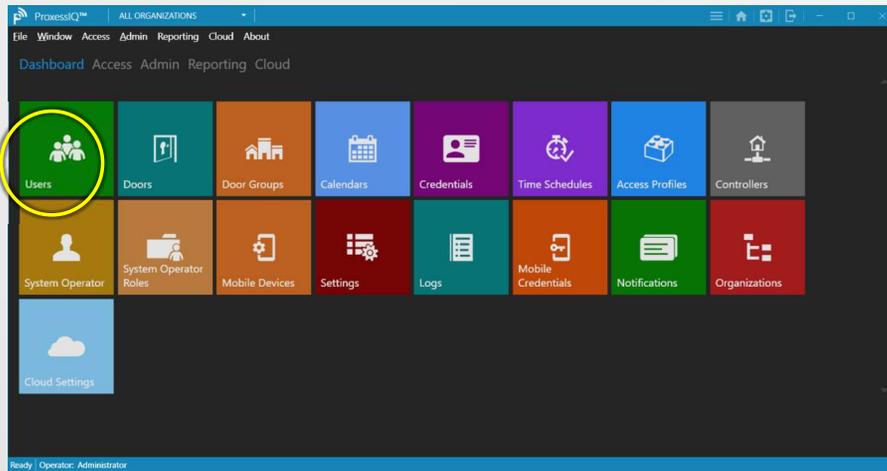
USERS

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



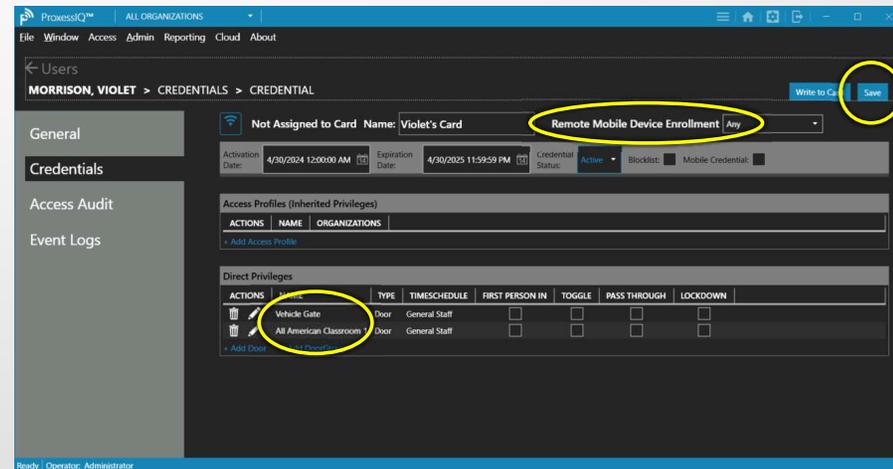
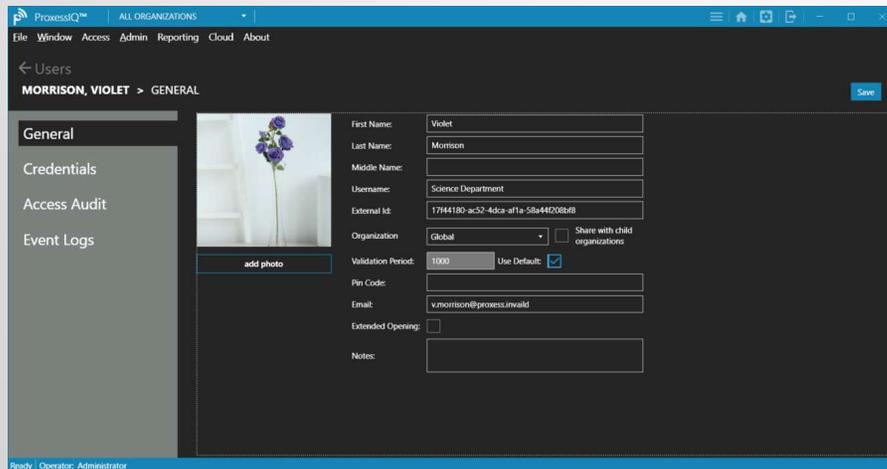
Encoding Physical Credentials using the Proxess Sync app

Encoding Cards with Proxess Sync-1



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.





Encoding Physical Credentials using the Proxess Sync app



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)

Encoding Cards with Proxess Sync- 2



Tap the Menu ("Hamburger") icon.



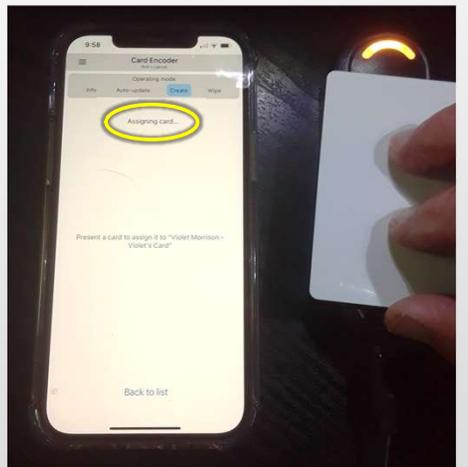
Tap "Card Encoder" and make sure the Enrollment Reader (ENR) is within 12" for the initial connection. The screen will state that it is looking for the ENR. Once connected, the ENR can be up to 20' away.



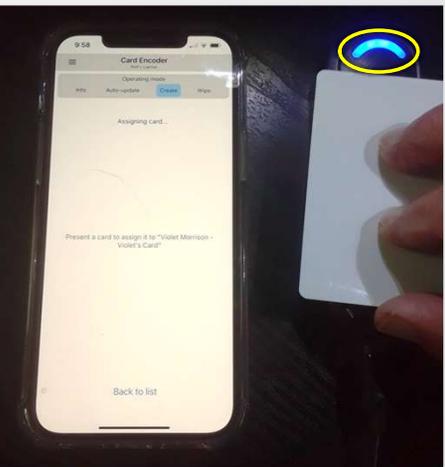
Once bound to an ENR, the screen will state it is ready for a credential to be presented.



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.



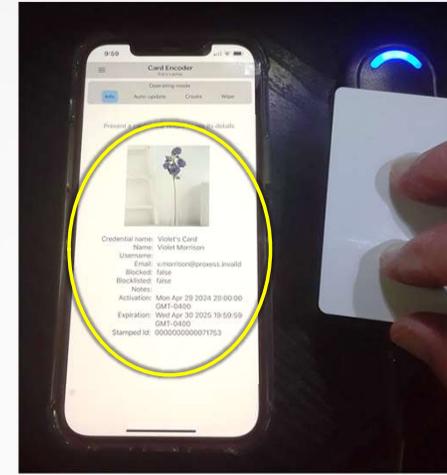
The blue LED shows the card is being encoded to that User's Credential. Please Remove the card from the ENR.



Verifying & Wiping Physical Credentials using the Proxess Sync app



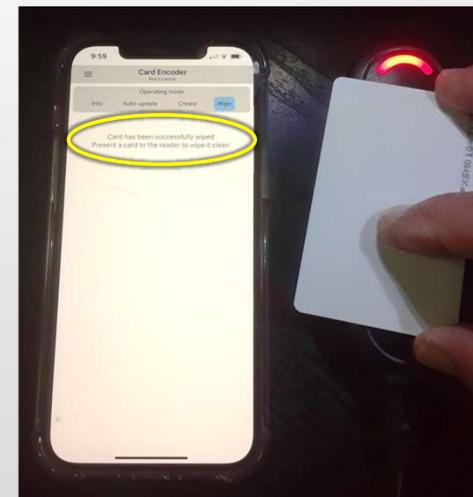
To Verify a credential or to see who a credential belongs to, Click on the "Info" button. Then place a card onto the reader surface. The blue LED shows the card is being read and/or written to.



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



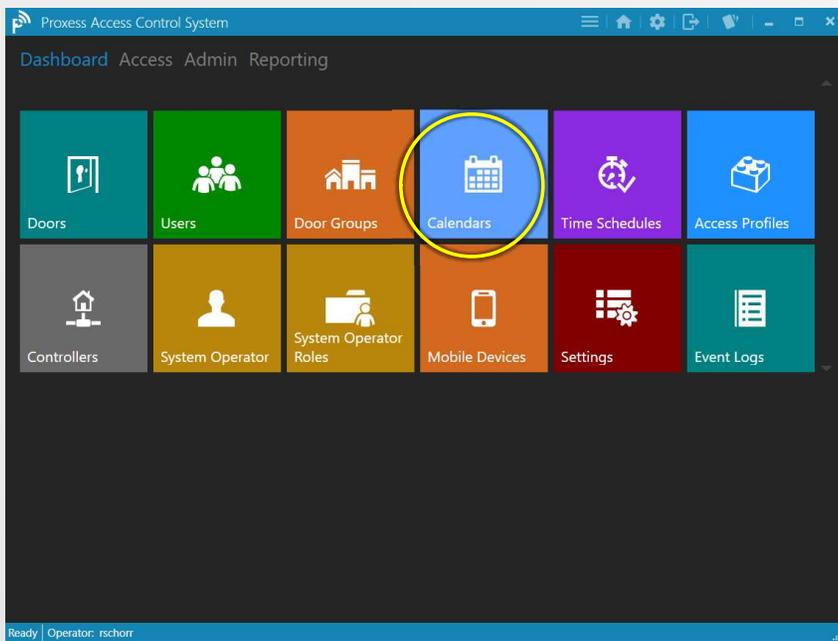
To Wipe & Delete a credential, Click on the "Wipe" button. Then place a card onto the reader surface. The blue LED shows the card is being read and/or written to.



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



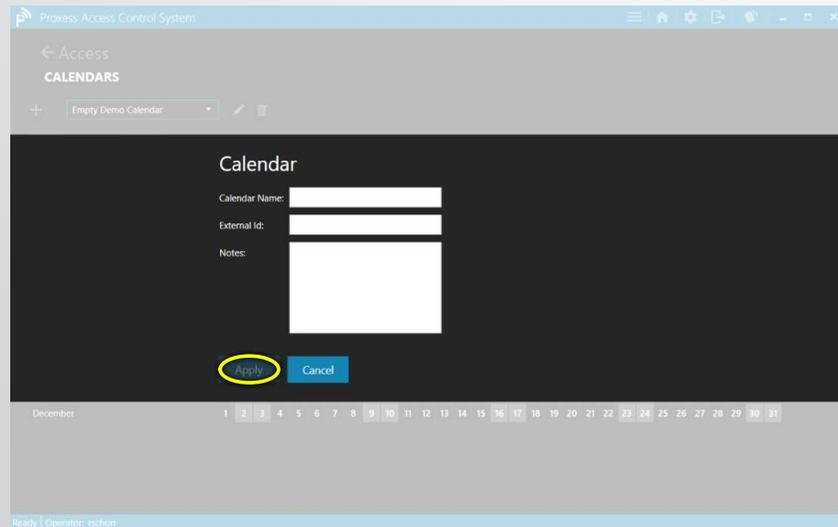
CALENDARS



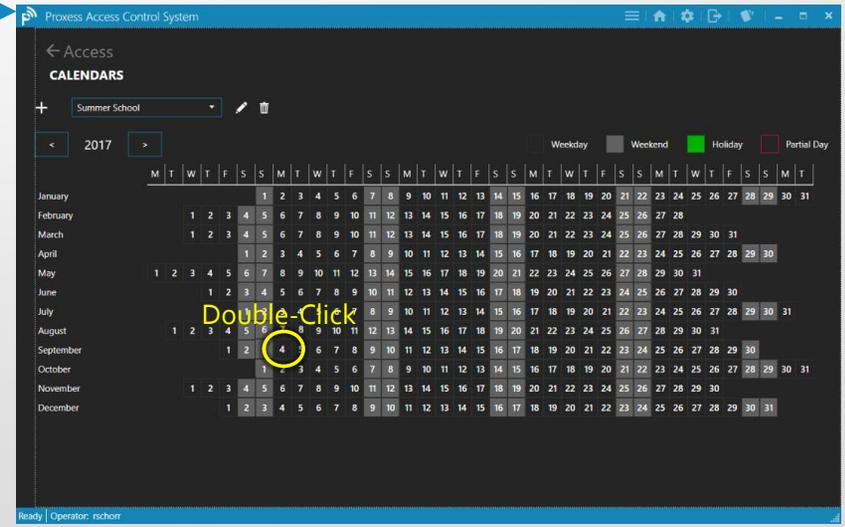
Click the icon for the "Calendars" module. Calendars are where you add traditional Holidays and other specialty days. Specialty days can be planned in advance (e.g. weddings at a church, sports games at a school), or added on-demand (e.g. weather related event).



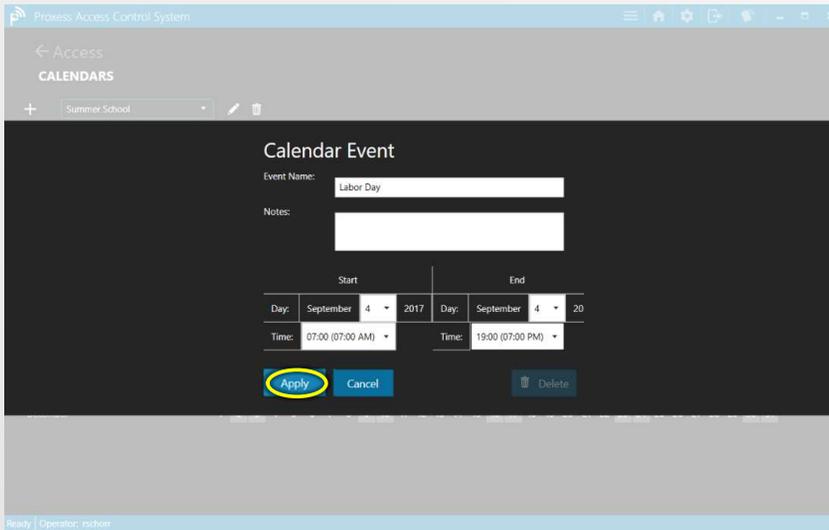
The Default calendar will appear, if this is a new system. Since a customer may have multiple locations, with each location abiding by different calendars, you may create multiple Calendars and apply a different Calendar to each lockset and door. Click the dropdown arrow to select a Calendar to view and the edit icon to do so. At this time click "+" to create a new Calendar.



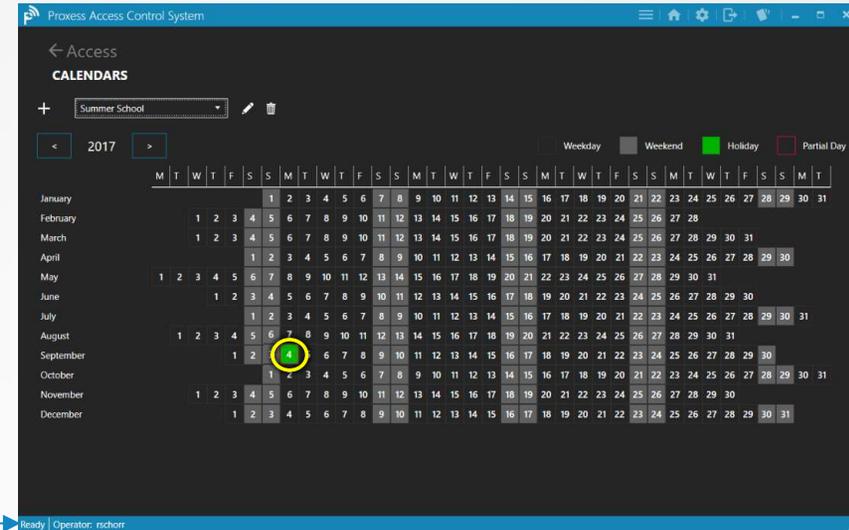
Enter the name for the new Calendar. This is the name that will appear in all the Doors selection screens. The External ID is optional and is an alternate reference that the customer may have. Enter any further notes you may have. Click "Apply" to continue.



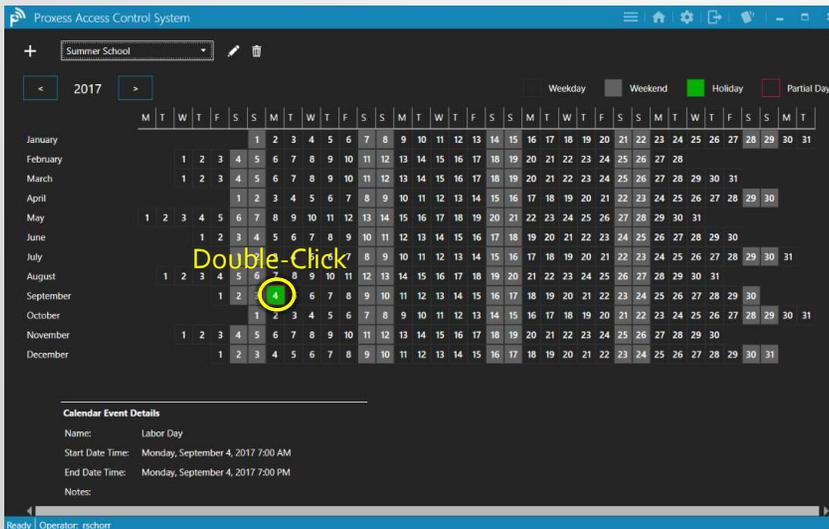
The Calendar you just created appears. To begin adding days for a Door to operate\function differently than normal\programmed, click on any day for the current year that is displayed (2017 in this case). To add a Calendar Event, Double-click on any day.



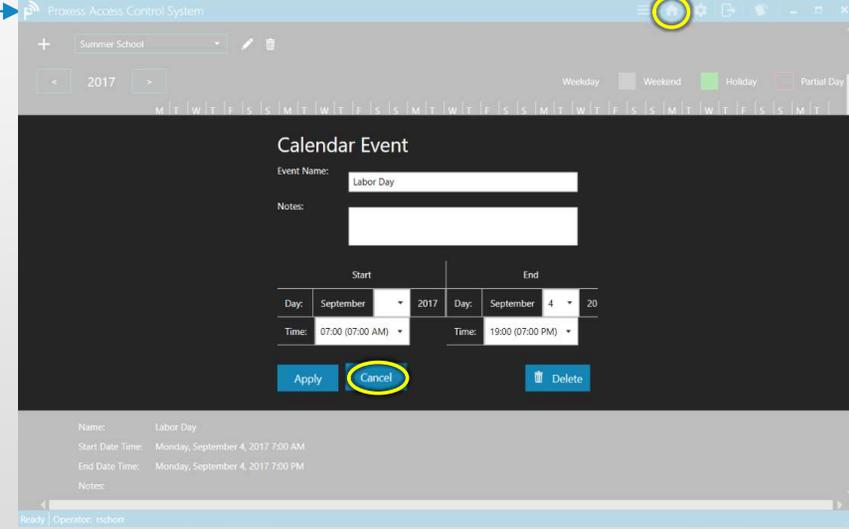
The page to create a new Calendar Event appears. Enter the Event Name you want along with any optional clarification Notes. Select the Start and End days and times for this special Door operation to occur and click "Apply" to save this new event.



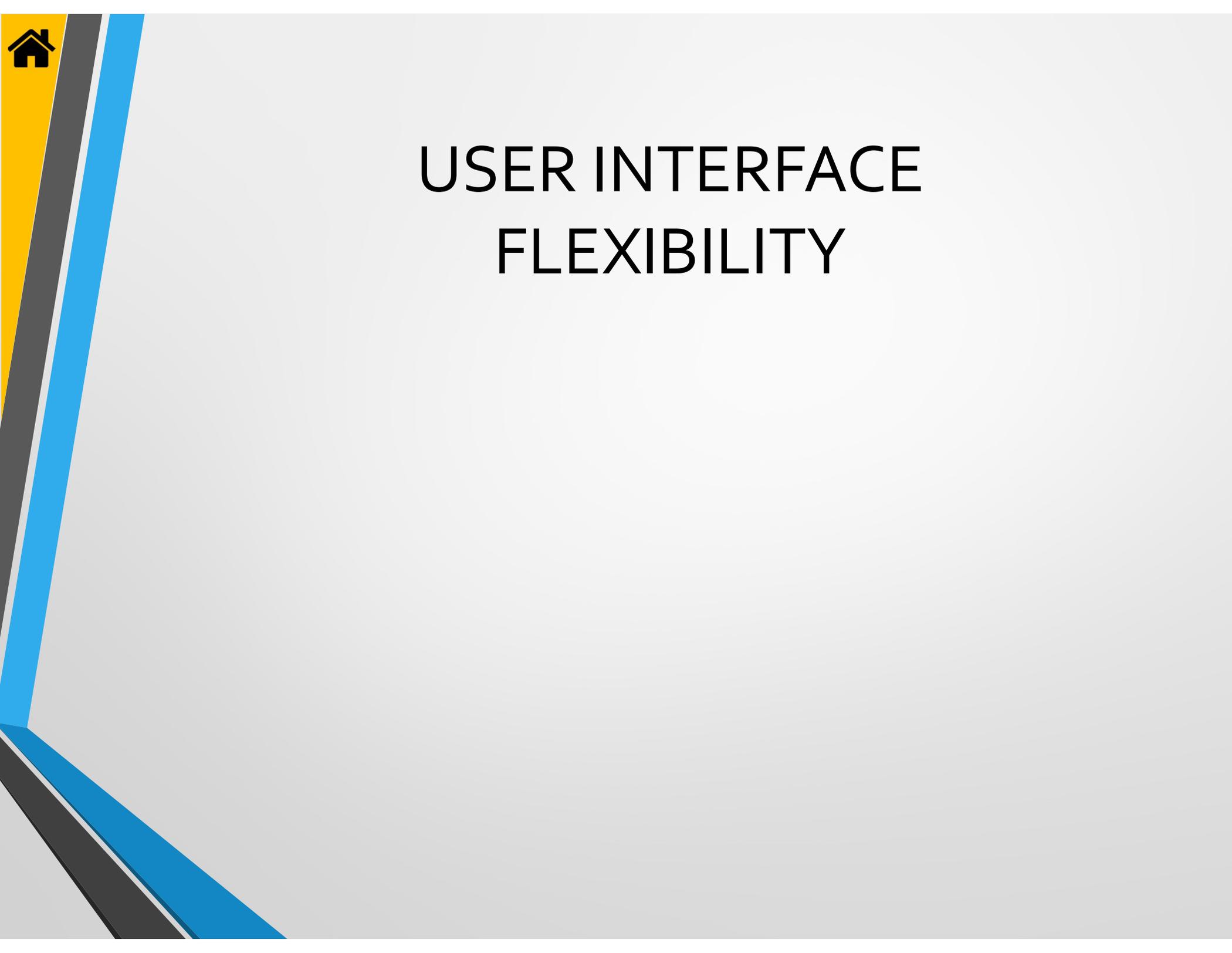
The new Holiday\Event now appears, highlighted in green. Note that a Holiday is the most common type of Event and is therefore the term used in the software and the two words are equal to this program. To view the detail of this Holiday\Event click on the green highlighted date.



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



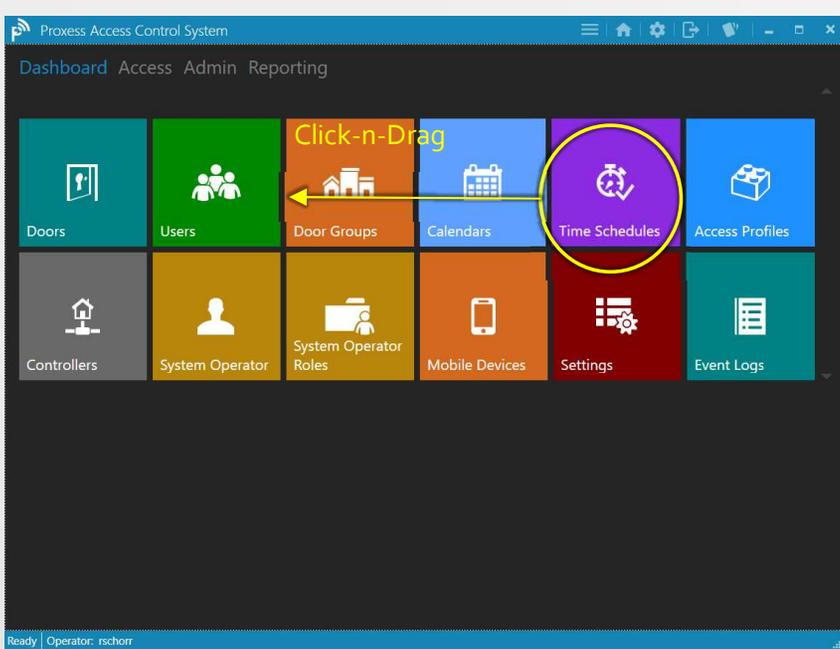
You can now make adjustments to the Holiday, or click "Cancel" to return to the previous screen and then click the Home icon on the top taskbar to return to the Home Screen \ Dashboard.



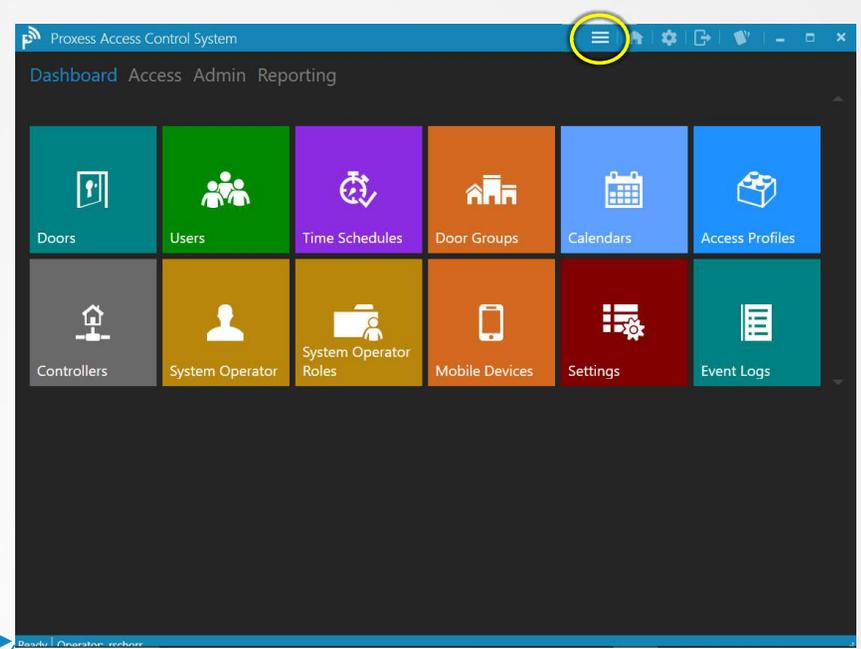
USER INTERFACE FLEXIBILITY



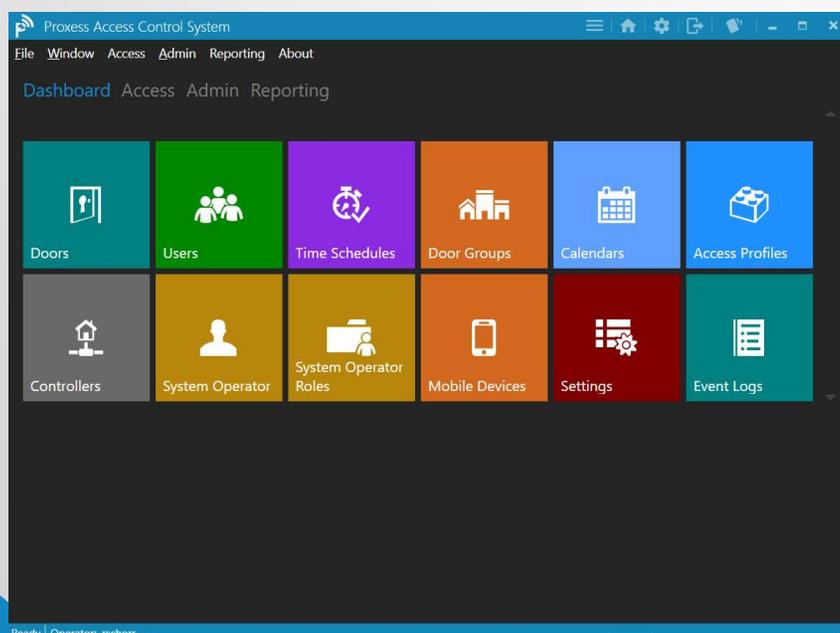
User Interface Flexibility - 1



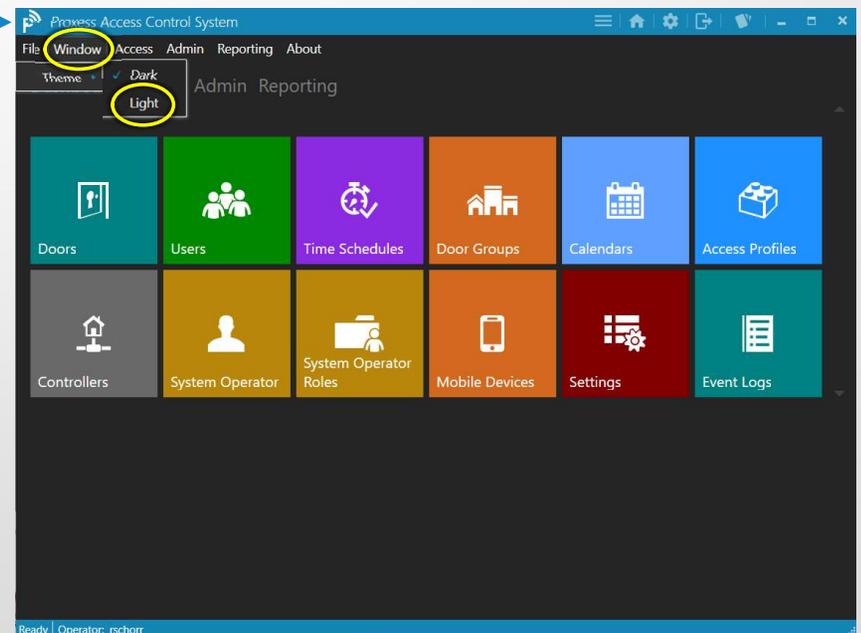
The Dashboard \ Home Screen \ User Interface may be customized in several ways. First, you may click-and-drag any module to another part of the screen, thus rearranging the module icons.



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



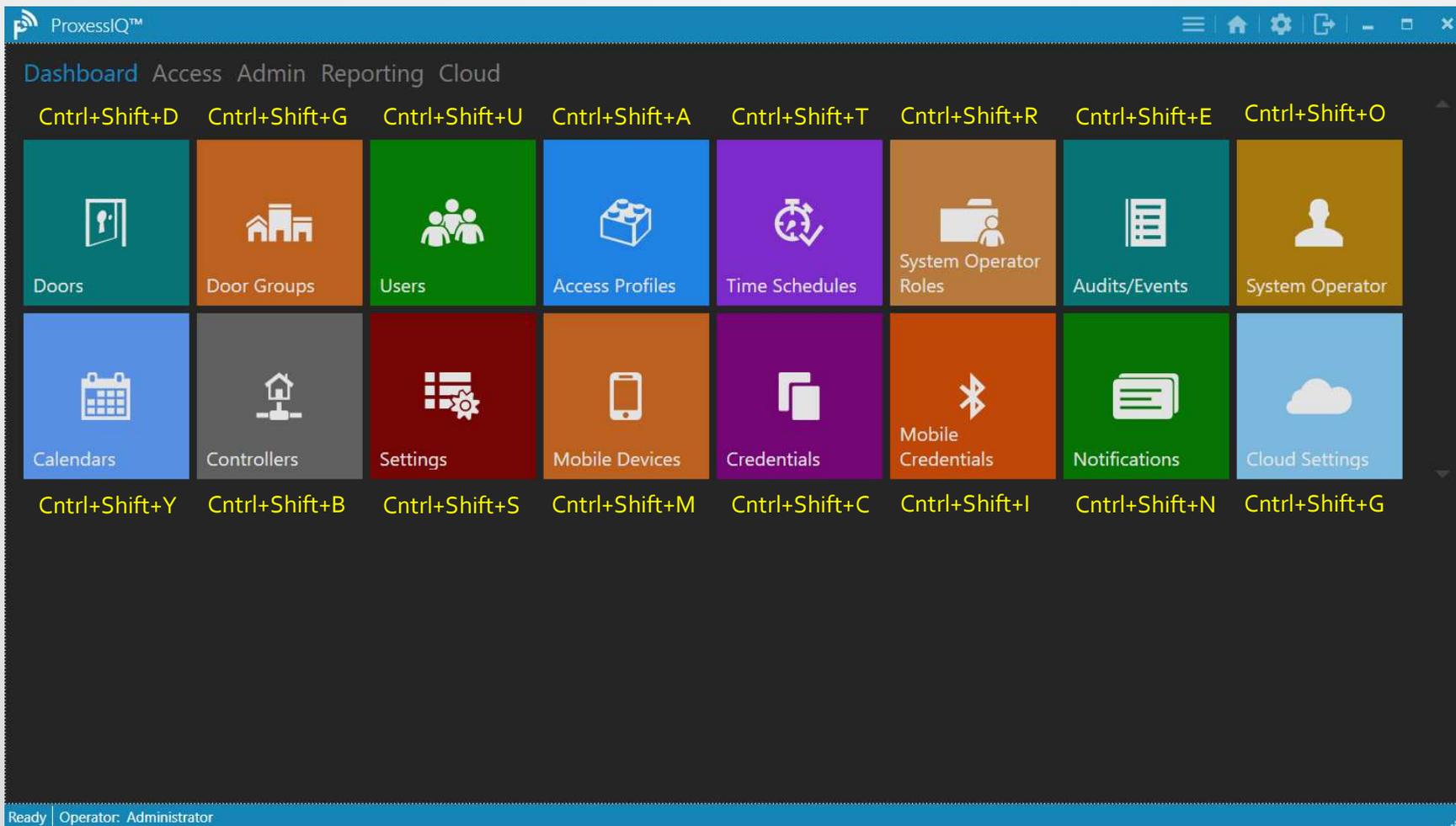
...The file shortcut menu will appear and remain at the top of the page throughout the system, until you again click on the same icon on the top taskbar.



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



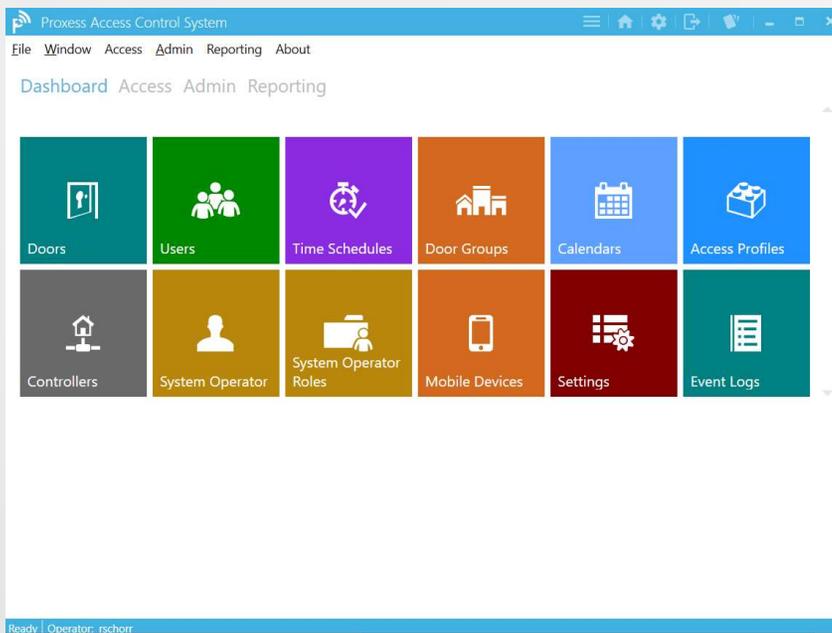
User Interface Flexibility - 2



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



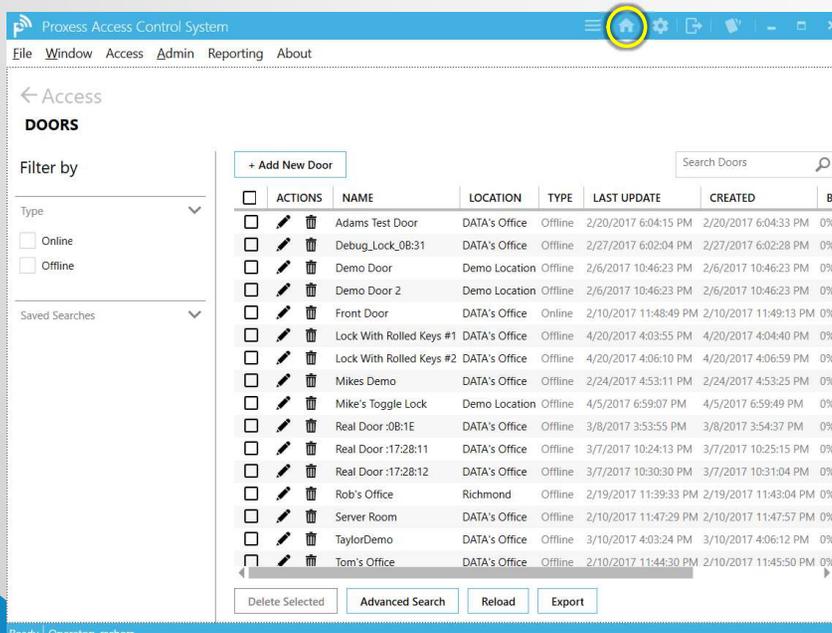
User Interface Flexibility - 3



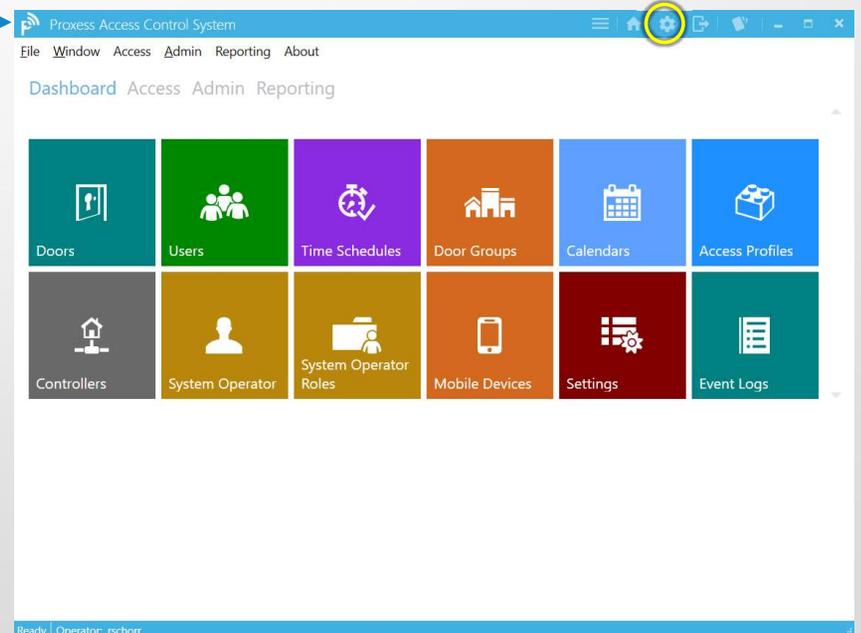
The screen background is now changed to white and will remain so throughout the system until the background is changed back to "Dark".



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



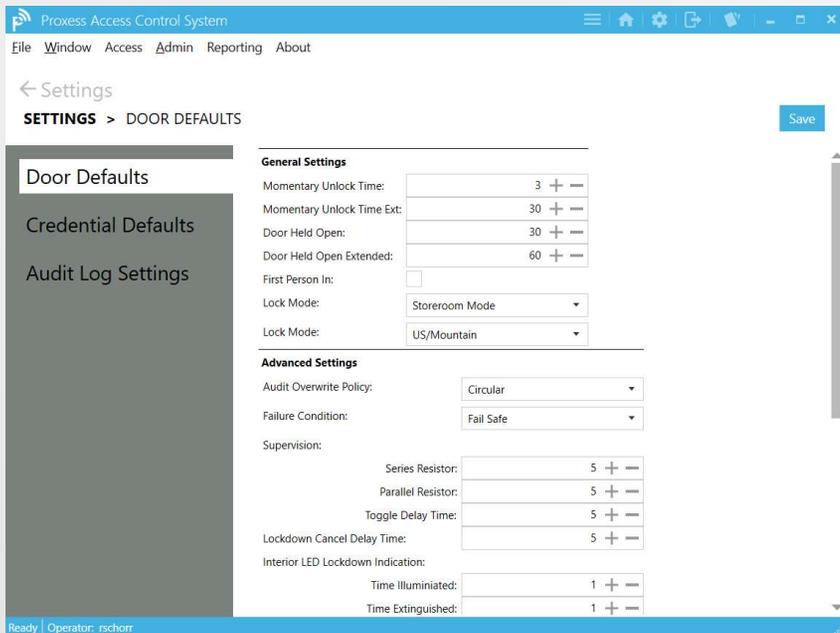
The Home icon is used from any screen in the system to bring you back to the Dashboard \ HOME Screen.



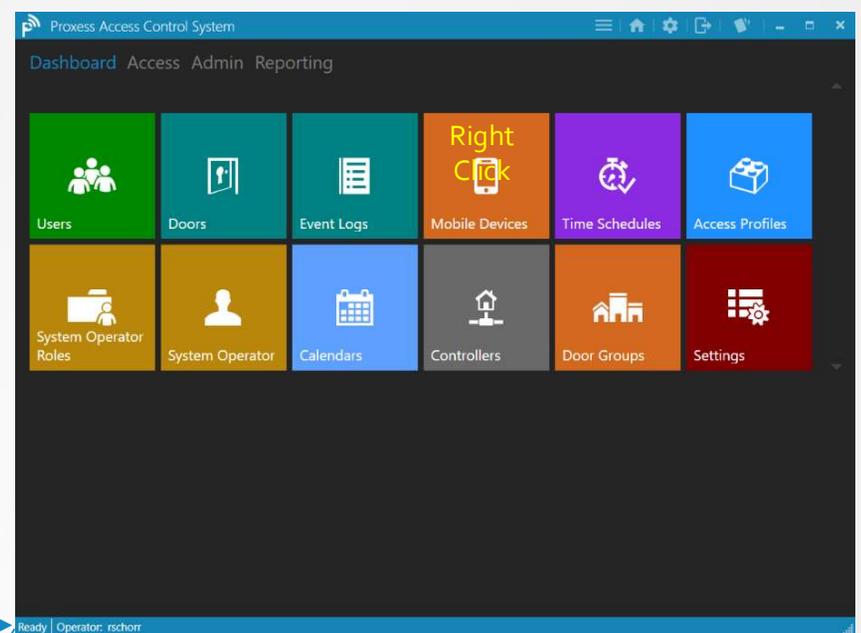
From any screen in the system, you can shortcut to the "Settings" module with a click on the icon shown in the top taskbar.



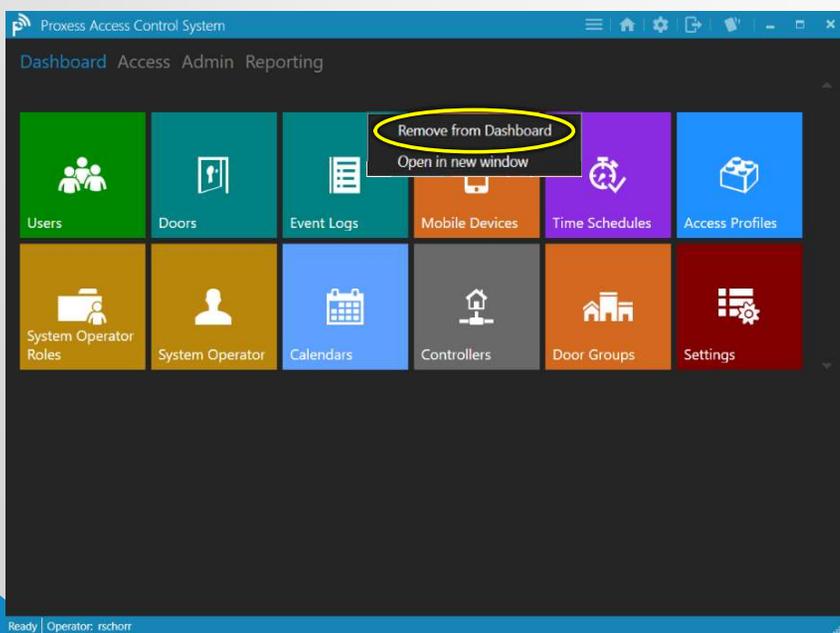
User Interface Flexibility - 4



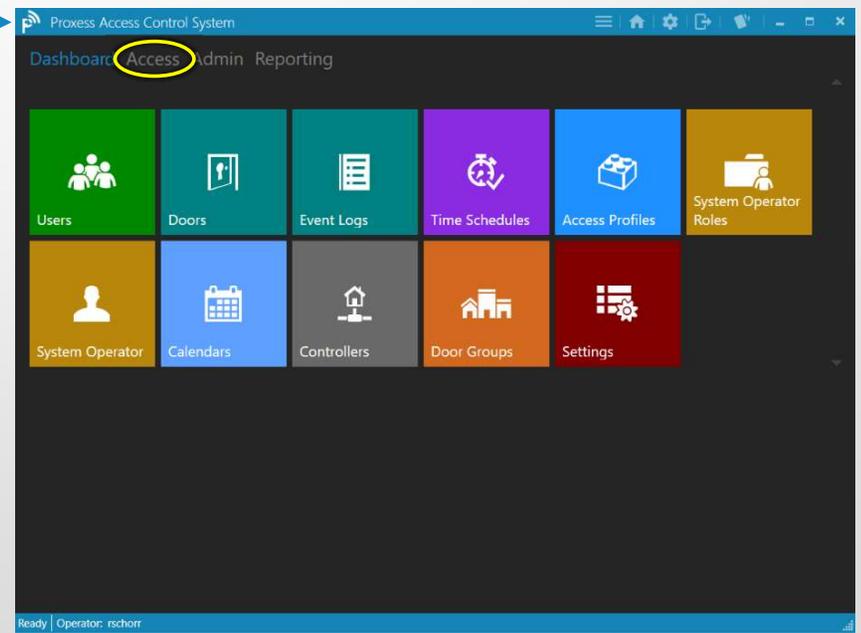
The "Settings" module opens. Now return to the Home Screen \ Dashboard.



Right-click on a module icon.



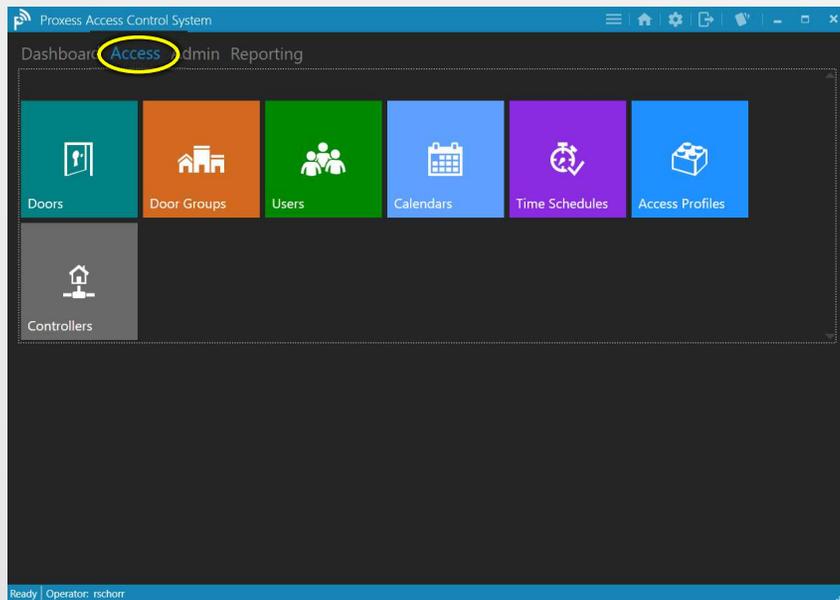
You may "Remove" the icon from the Dashboard or open it in a new window (Is this working?).



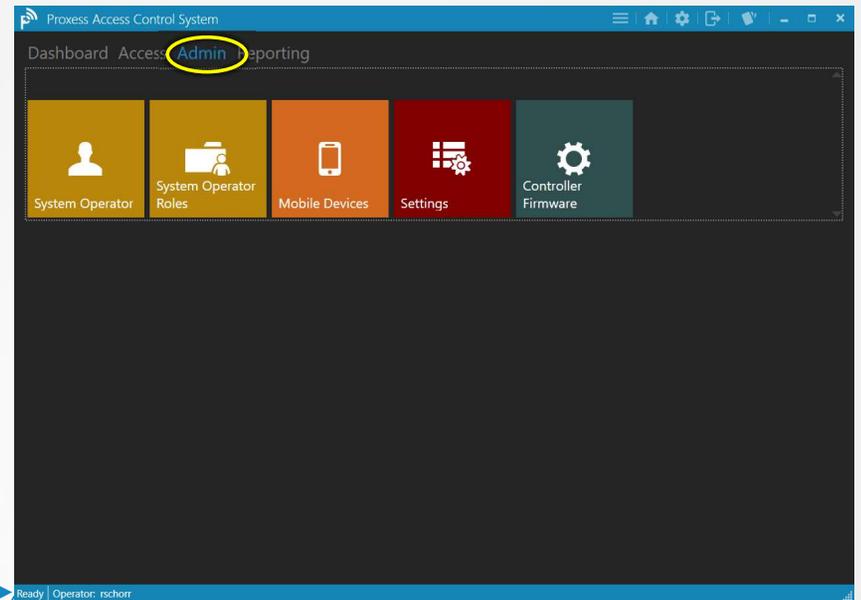
Click on "Access" in the top menu.



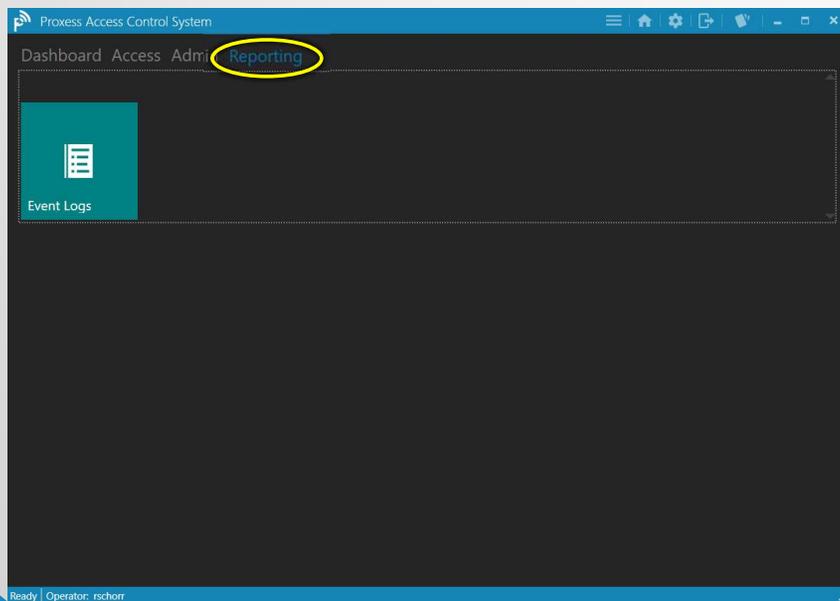
User Interface Flexibility - 5



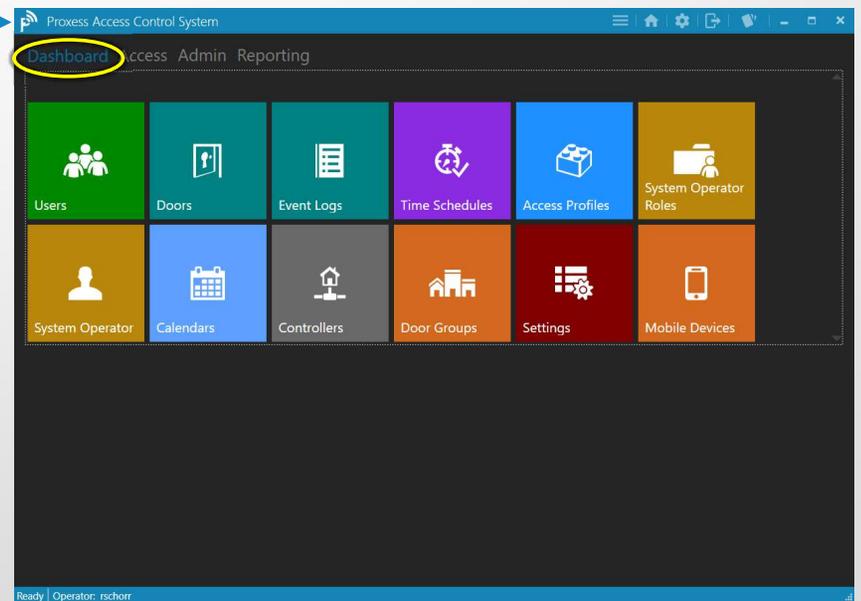
These are the module icons that appear when you click on "Access".



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



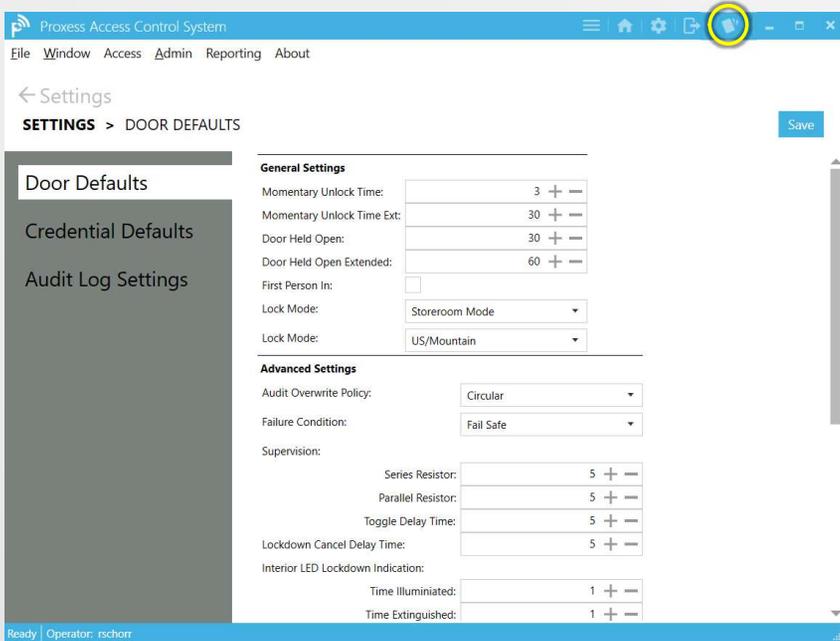
These are the module icons that appear when you click on "Reporting".



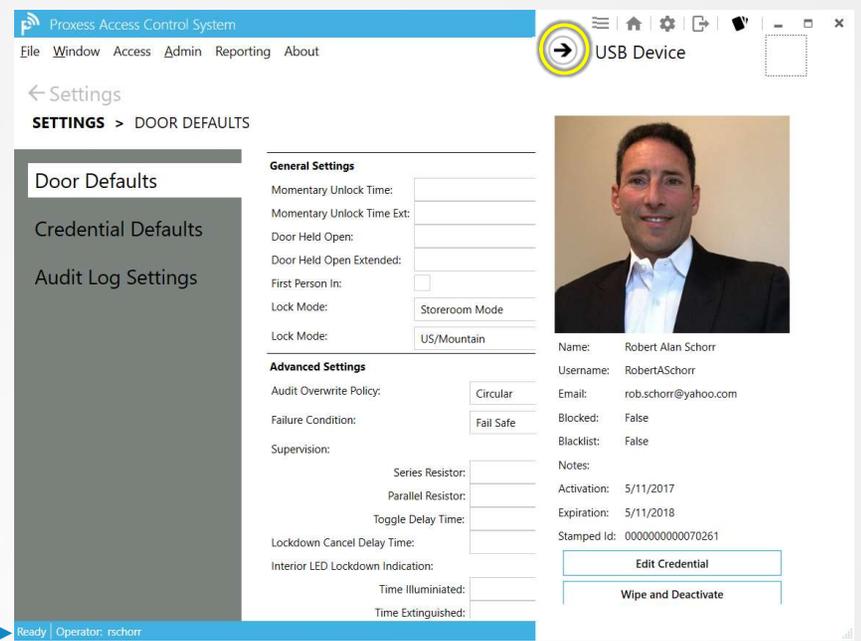
These are the module icons that appear when you click on "Dashboard".



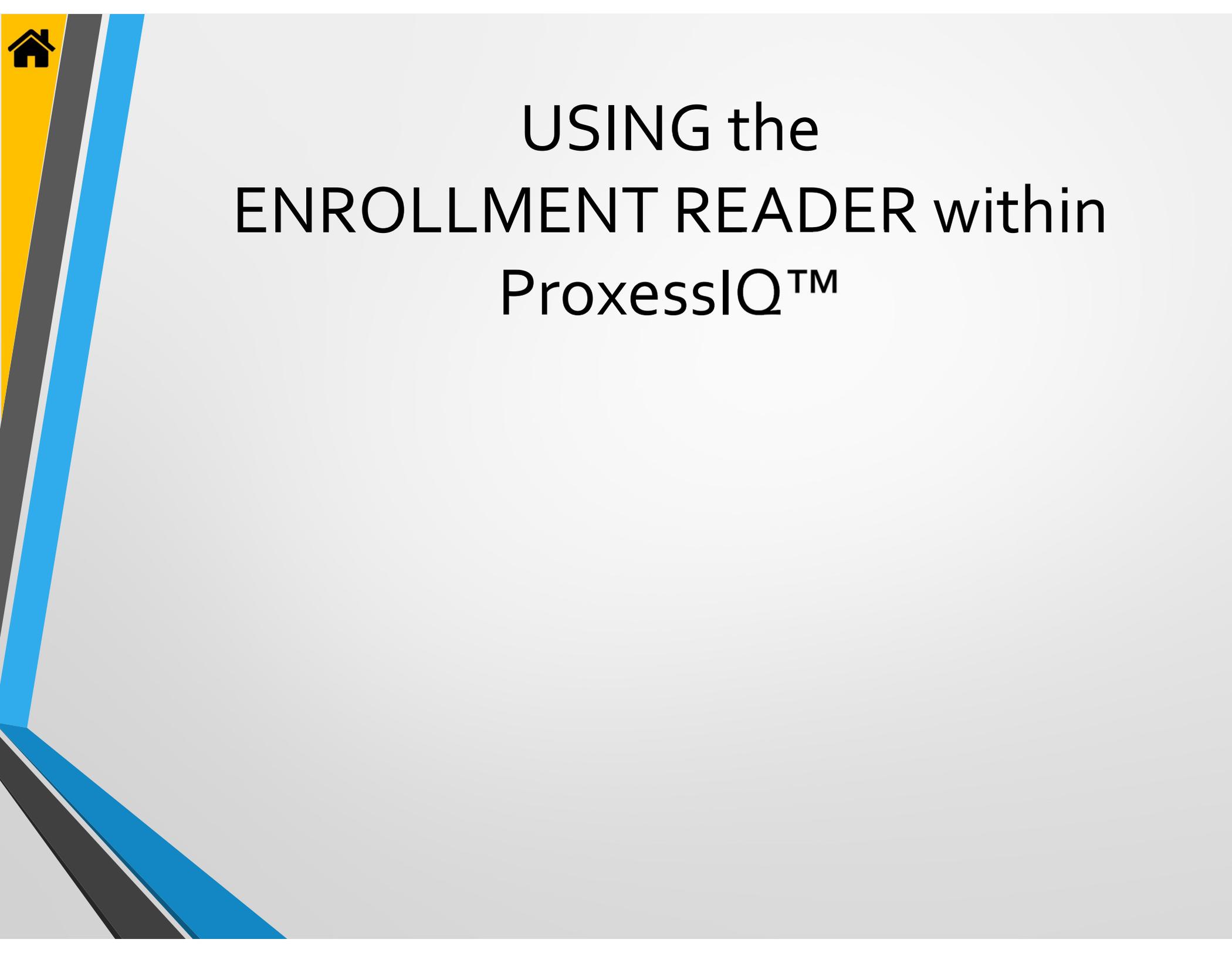
User Interface Flexibility - 6



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



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

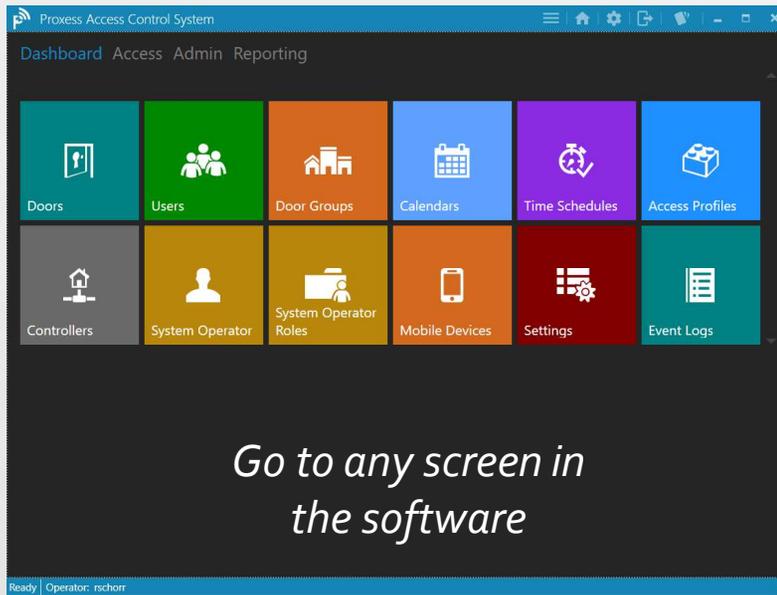


USING the ENROLLMENT READER within ProxessIQ™



The Pop-up Window

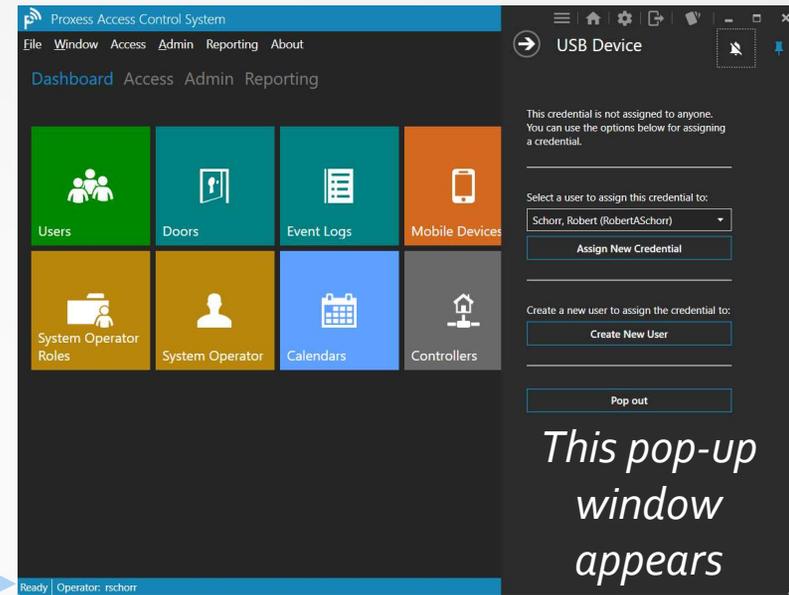
Using the Enrollment Reader - 1



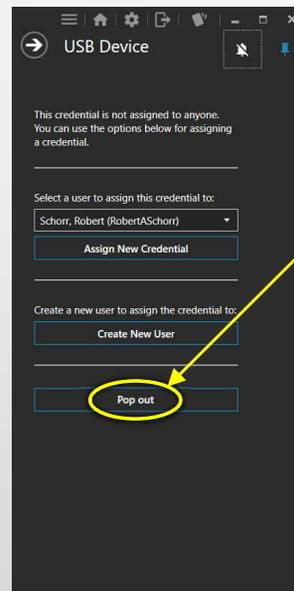
Go to any screen in the software



Place a new card on the enrollment reader



This pop-up window appears



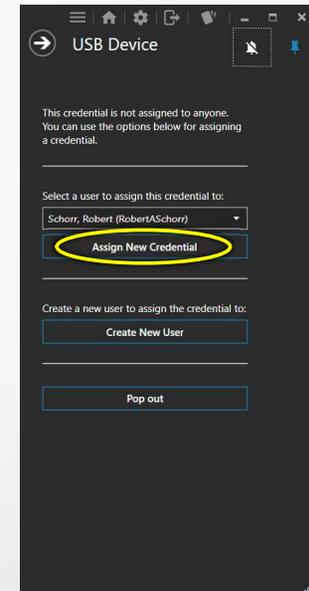
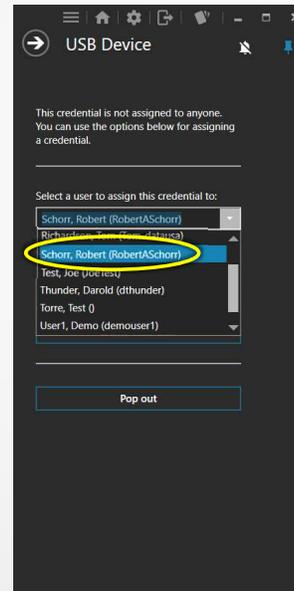
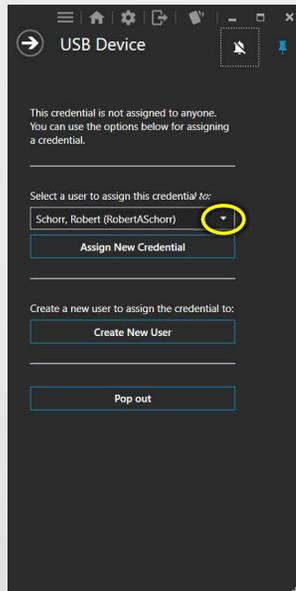
The pop-up window presents several options for the operator.

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

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



Assign a Credential to an Existing User



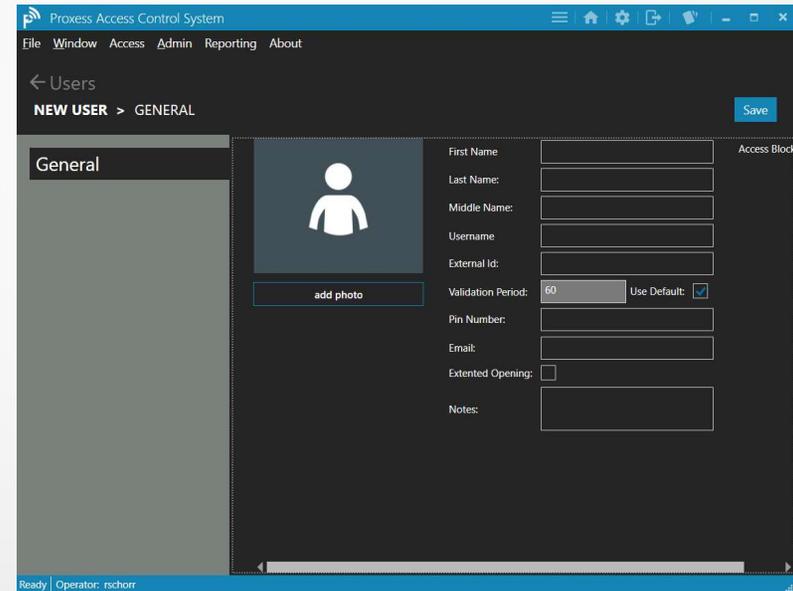
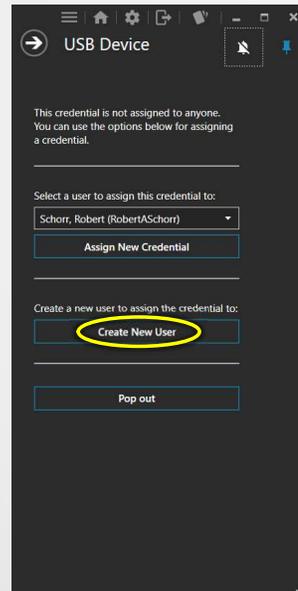
The Operator may assign the credential that is currently on the enrollment reader to an Existing User.

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

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



Adding a New User

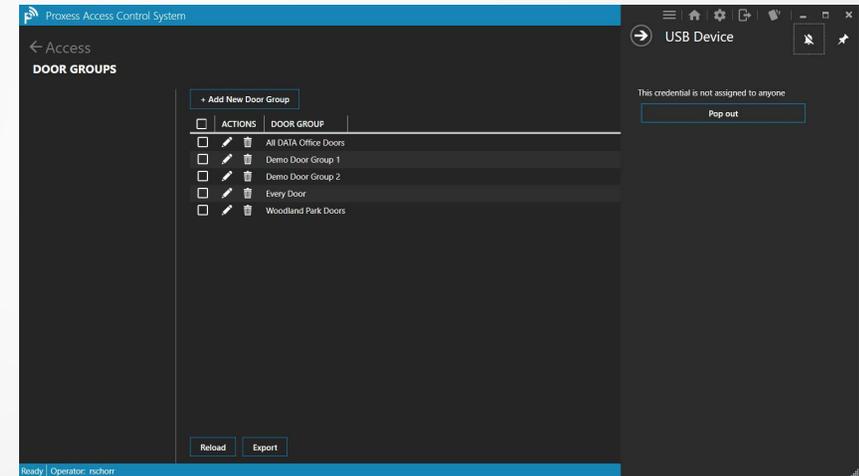
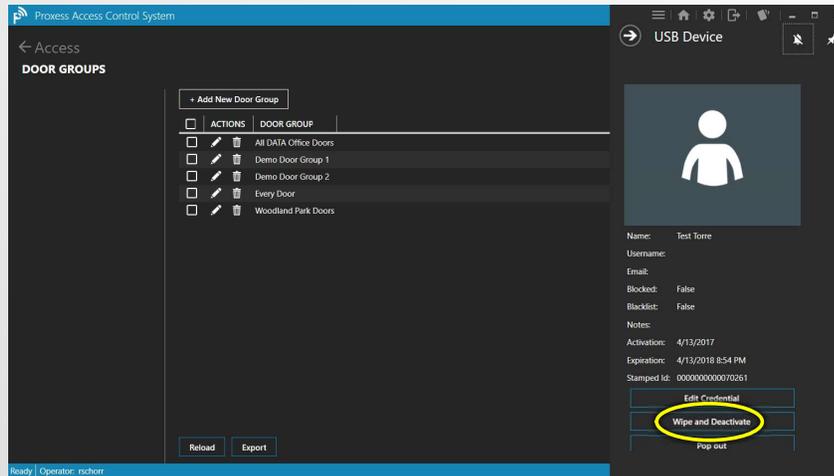


With the card on the enrollment reader, the Operator may create a New User record for it.

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



Whose card is this? & Deleting a Credential



To find out who a card belongs\has already been assigned, place it on the enrollment reader while in any screen in the software.

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

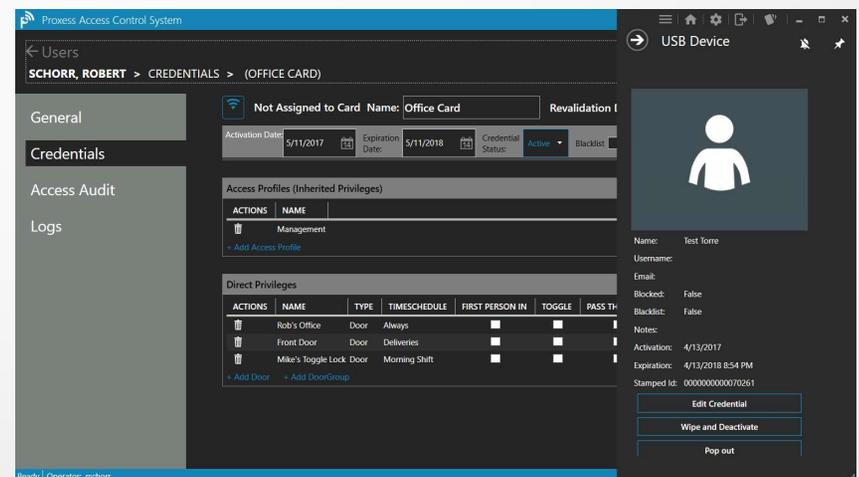
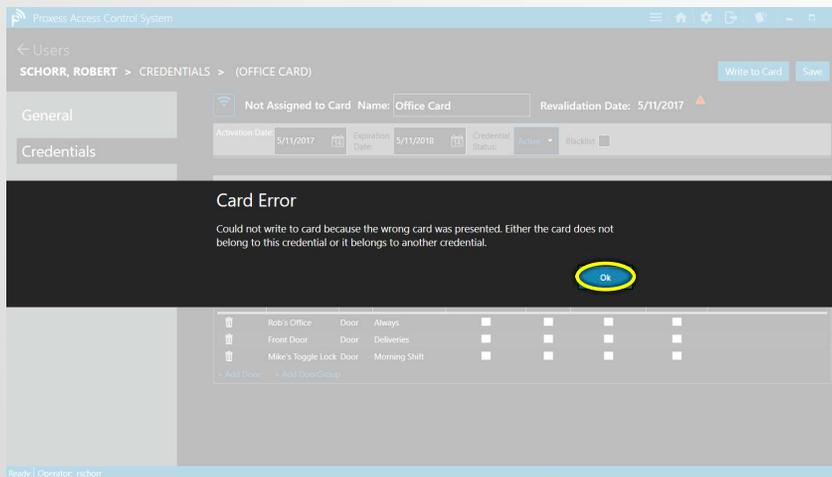
The operator may click "Edit Credential" to be brought to the edit screen for that user and may click "Pop out" to move the window freely on their desktop.

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

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



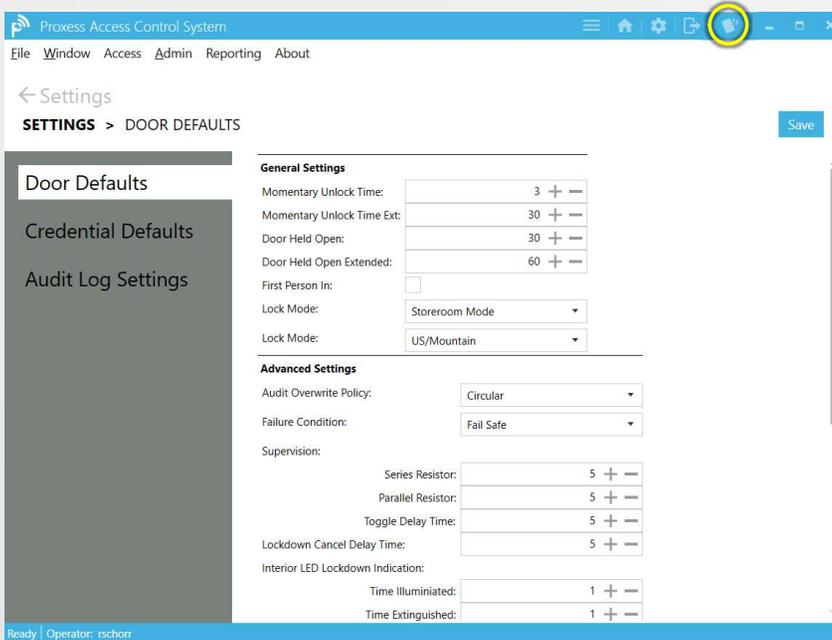
Attempting to Enroll an Existing Card



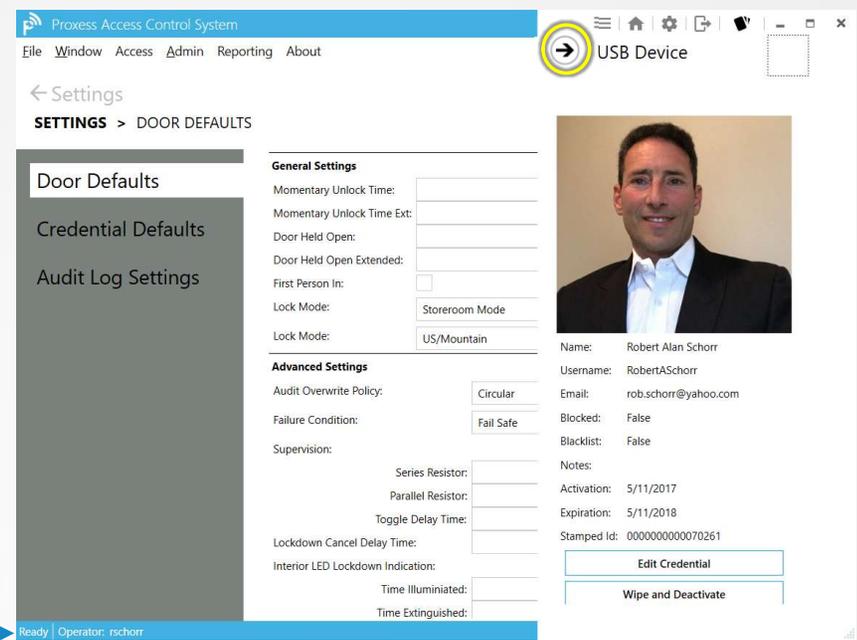
After a user has been added to the system, placing a credential on the enrollment reader and attempting to enroll or encode one that has already been programmed and assigned to someone else (from this system or any other system) will result in the above "Card Error" screen appearing.



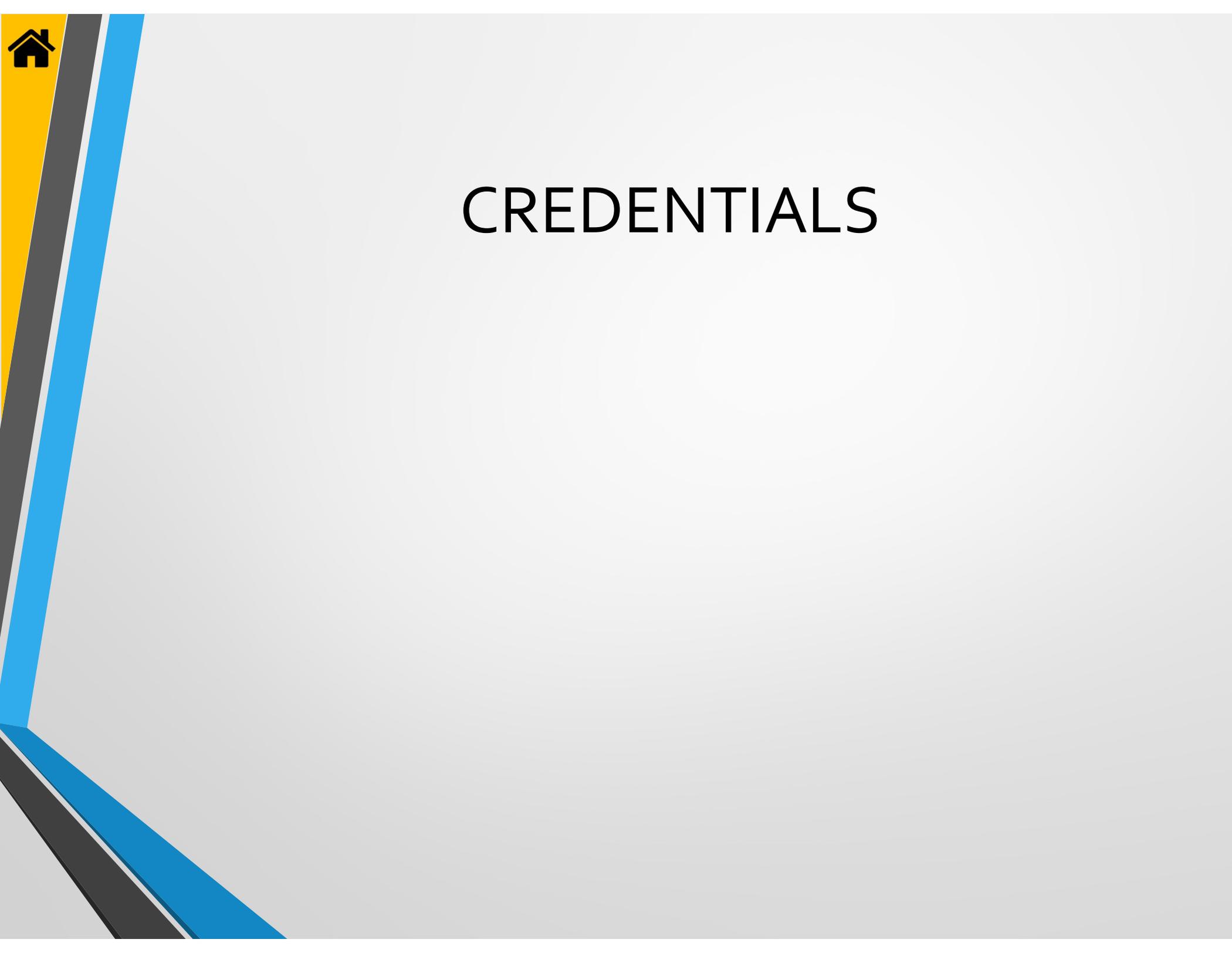
Using the Enrollment Reader - 6



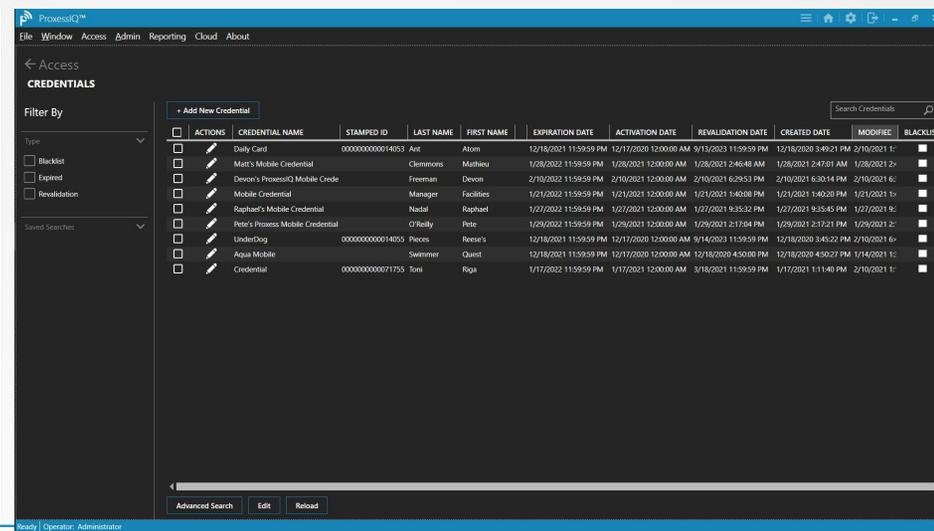
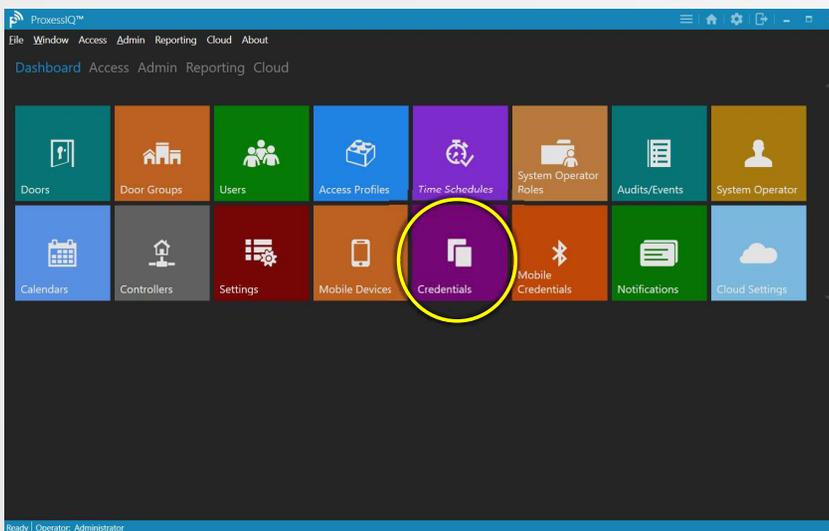
From any screen in the system, click on the icon shown in the top taskbar



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



CREDENTIALS



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 ...



Advanced Searches of Credentials

ProxessIQ™ | ALL ORGANIZATIONS

File Window Access Admin Reporting Cloud About

← Access

CREDENTIALS

Filter By

+ Add New Credential

Search Credentials

	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
<input type="checkbox"/>		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	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		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	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		B		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	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		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	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		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	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		Maya Mobile		Ba	Maya	baldewicz@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	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		Maya Lockdown		Ba	Maya	baldewicz@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	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		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	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input checked="" type="checkbox"/>		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	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		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	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		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	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		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	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		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	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Global
<input type="checkbox"/>		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	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		Dexter's Mobile		Earney	Dexter	earneyde@gysu.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	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		Maddir G Mobile		Gia	MAd	mgjardina@arcsalloway.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	<input type="checkbox"/>	<input type="checkbox"/>	Global

Advanced Search Edit Reload

Ready | Operator: Administrator

Credentials - 2

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

ProxessIQ™ | ALL ORGANIZATIONS

File Window Access Admin Reporting Cloud About

← Access

USERS

Filter by

Advanced Search

Last Name Contains

AND (Exclusive) OR (Inclusive)

Search Save

	ACTIONS	LAST NAME	FIRST NAME	MIDDLE NAME	EMAIL	USERNAME	ORGANIZATIONS
<input type="checkbox"/>		124	Borden				Global
<input type="checkbox"/>		Admin	Super		fake@		Global
<input type="checkbox"/>		Ba	Maya		baldewicz@westerntc.edu		Global
<input type="checkbox"/>		Bartee	Carl		cbartee@fbcglenarden.org		Global
<input type="checkbox"/>		Cobb	Scott		scobb@eyeonis.com		Global
<input type="checkbox"/>		CoreMK	SwitchTech				Global
<input type="checkbox"/>		Darion	KB NE		dstone@kelleybros.com		Global
<input type="checkbox"/>		Earney	Dexter		earneyde@gysu.edu		Global
<input type="checkbox"/>		Gia	MAd		mgjardina@arcsalloway.org		Global
<input type="checkbox"/>		Ho	Dawn		dawn@qetseam.com		Global

Delete Selected Reload Export Import

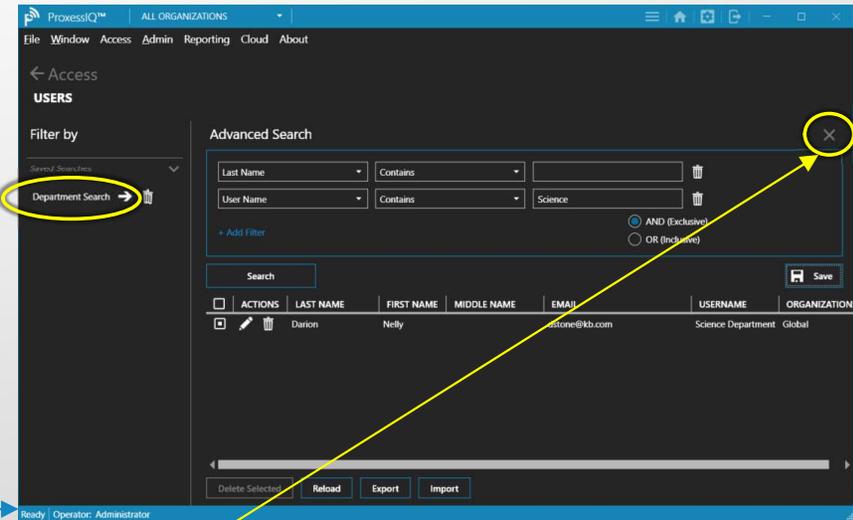
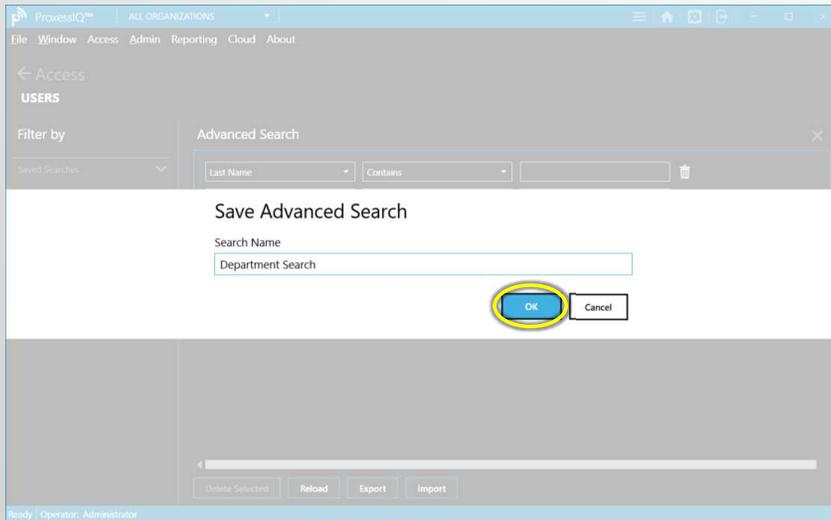
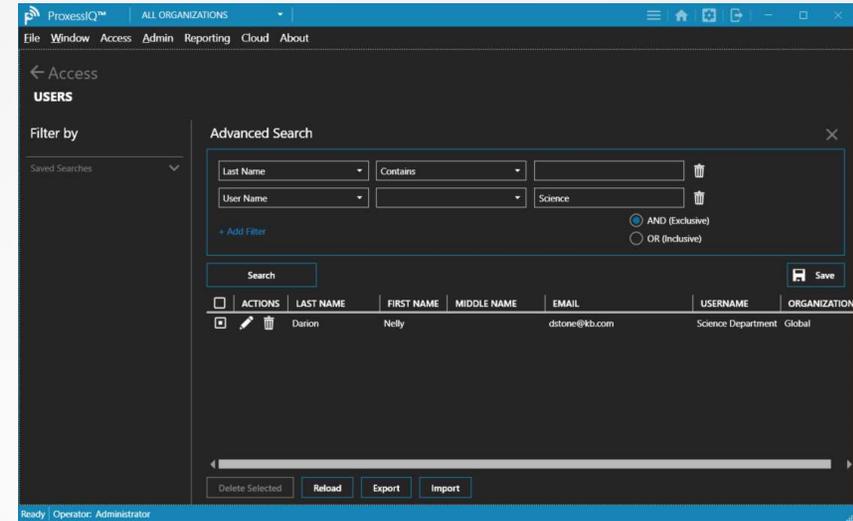
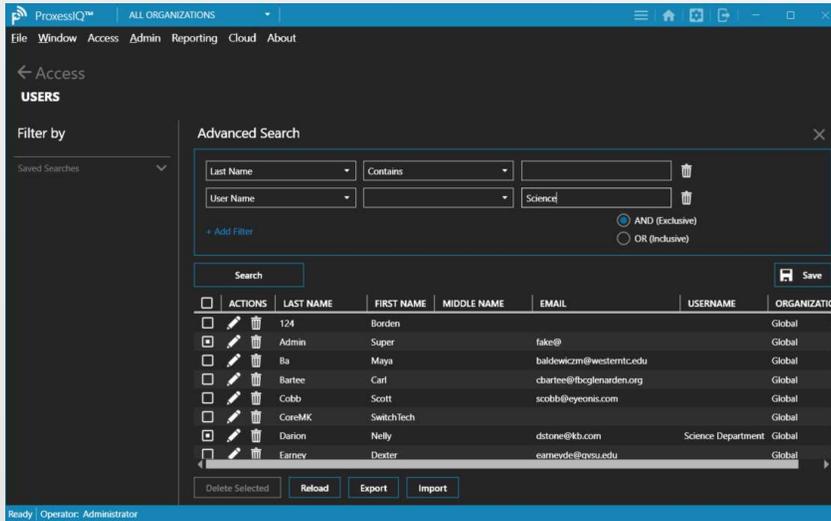
Ready | Operator: Administrator





Advanced Searches of Users

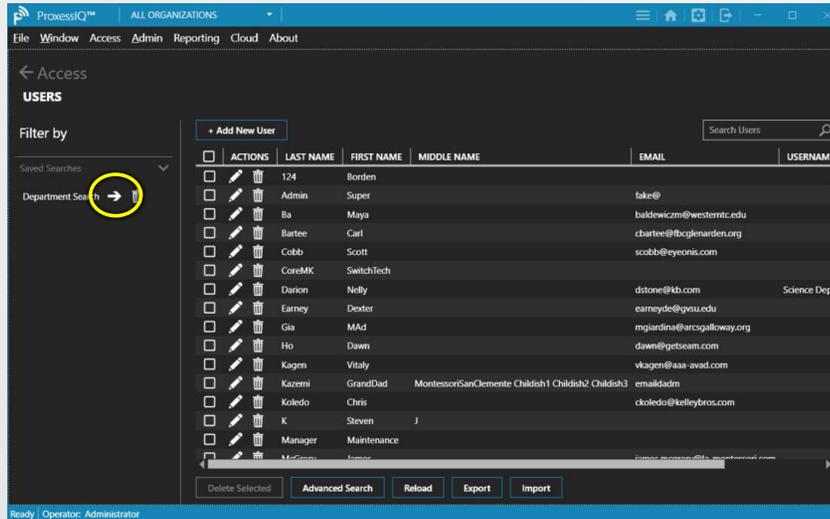
Within each User record



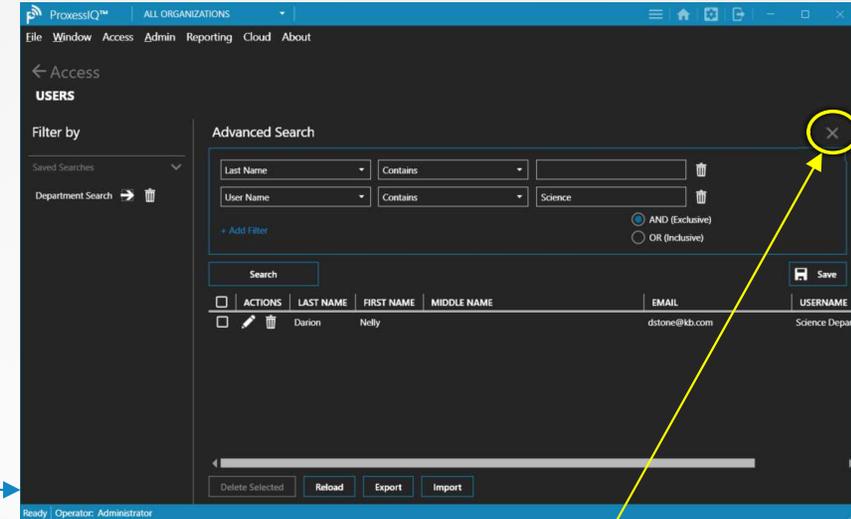
Name this search for your future use and click "OK".
Your new custom search will now appear in this list, for later execution by this and other operators.
When you have completed your Search, you must click "X" to bring you back to the full list of Users, or the User menu will continue to only show those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



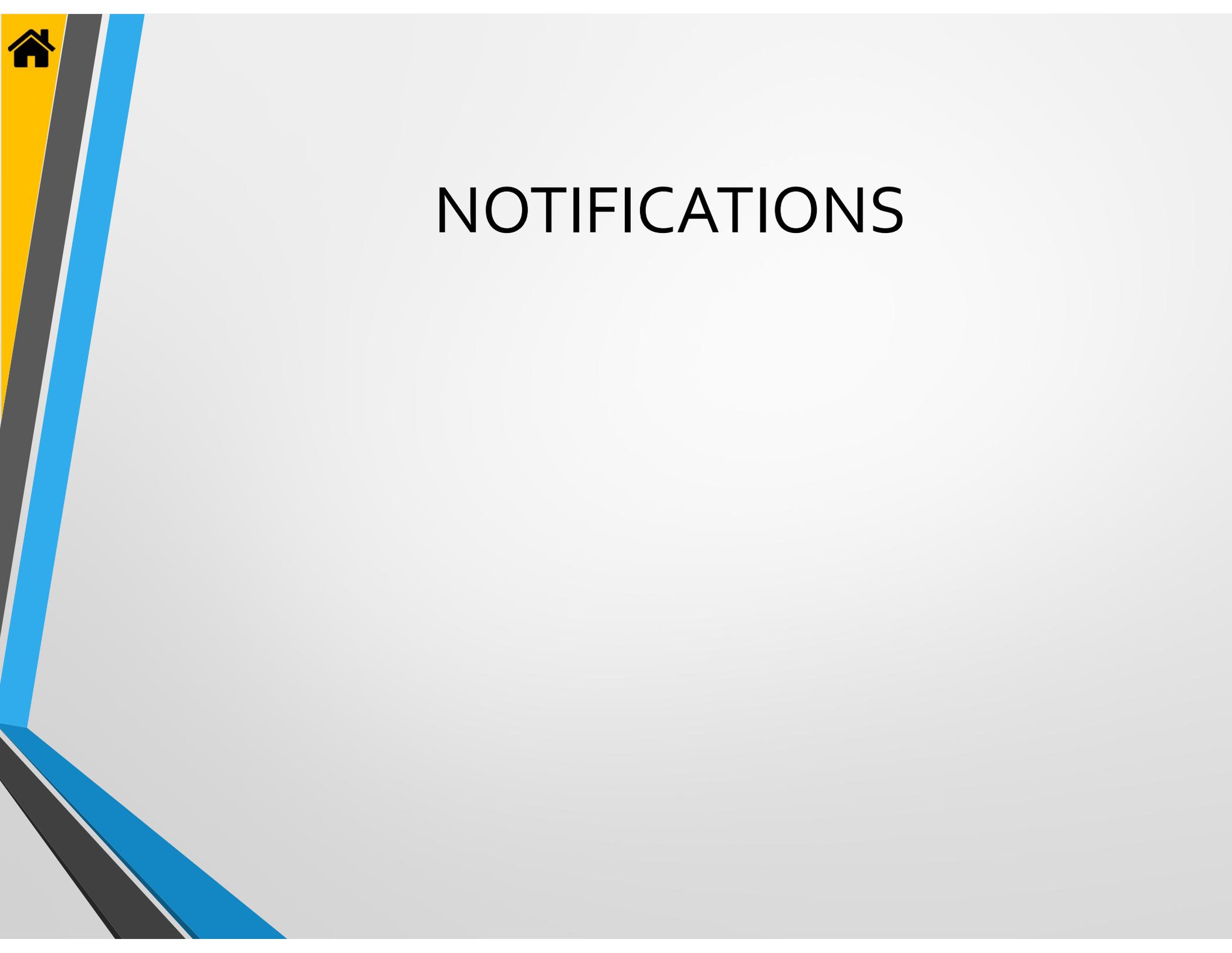
Advanced Searches of Users



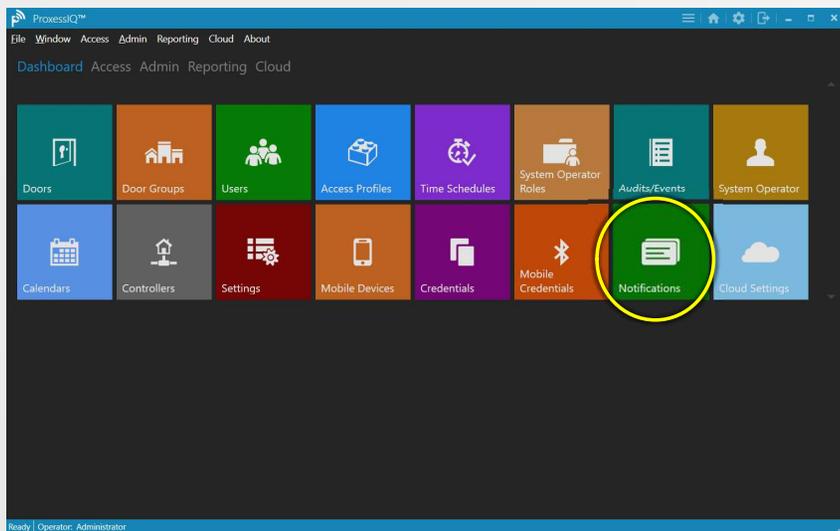
You are now returned to the full list of Users. You may execute on that saved search again any time, by clicking on the arrow next to its name.



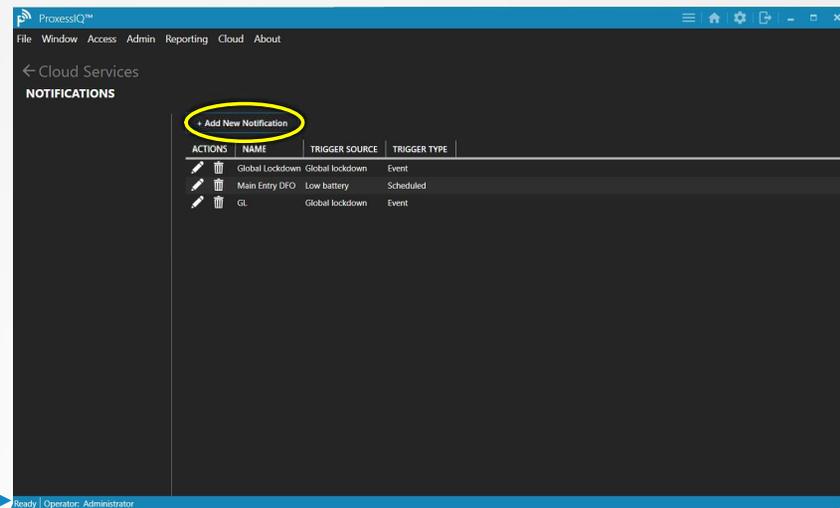
You may Export the search results to a .csv for further manipulation and click the "X" and return to your normal system work.



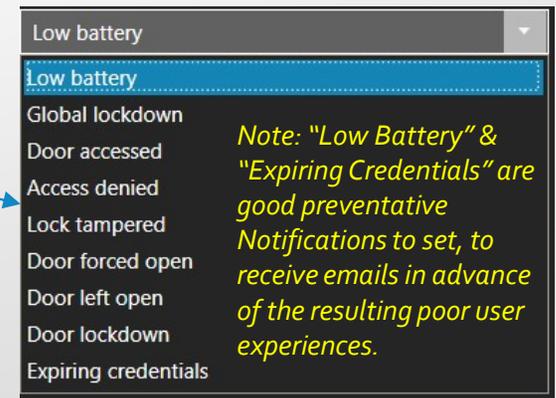
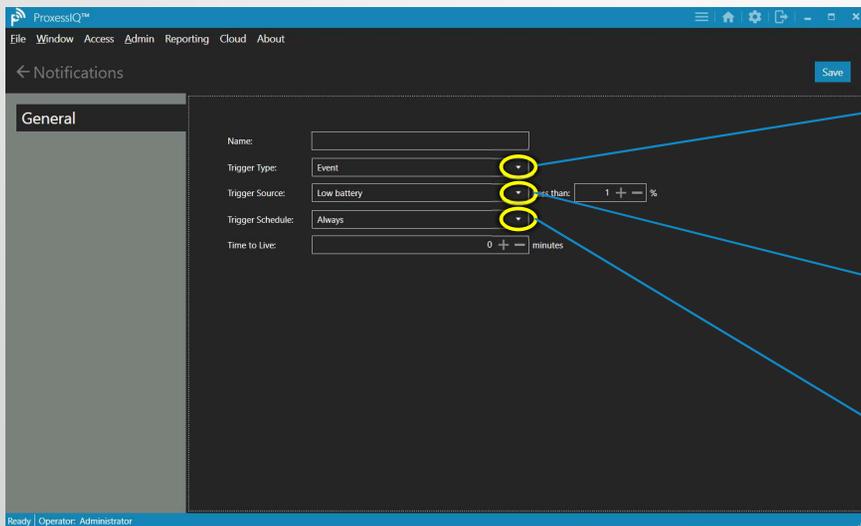
NOTIFICATIONS



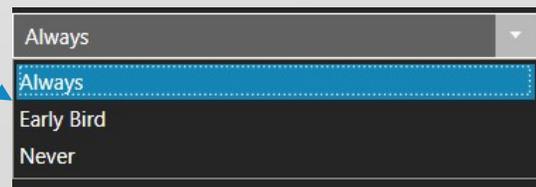
From the Home screen \ Dashboard, click "Notifications".



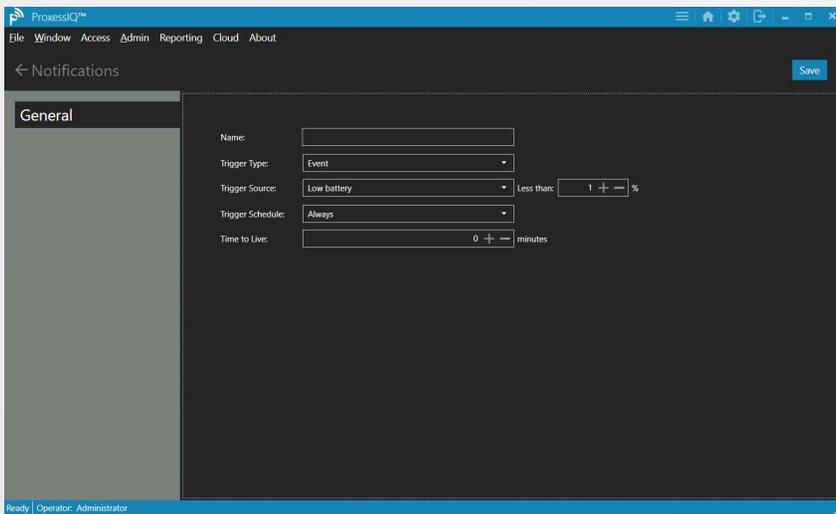
Your existing Notifications will be listed. Click "Add New Notification" to do so. You may click on the column titles (Name, Trigger Source and Trigger Name) to sort by them in alphabetical order. You may edit or delete any existing Notification by clicking on its Pencil/Edit icon on the left side.



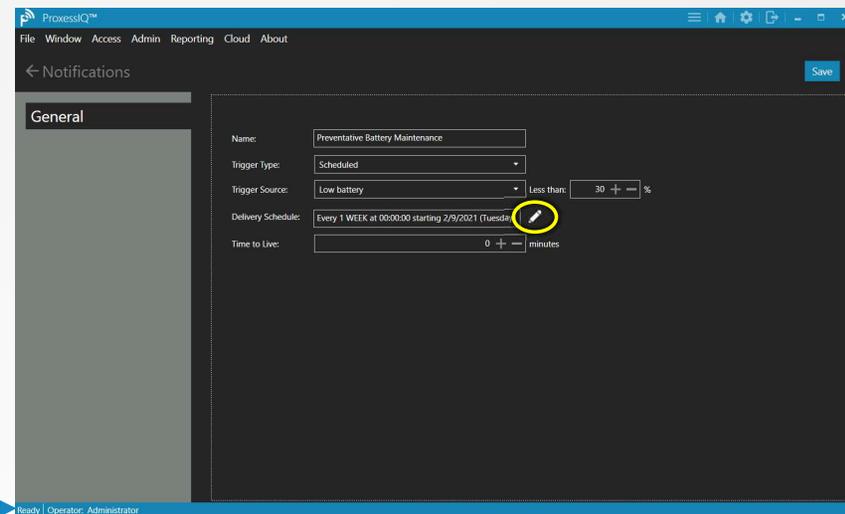
Note: "Low Battery" & "Expiring Credentials" are good preventative Notifications to set, to receive emails in advance of the resulting poor user experiences.



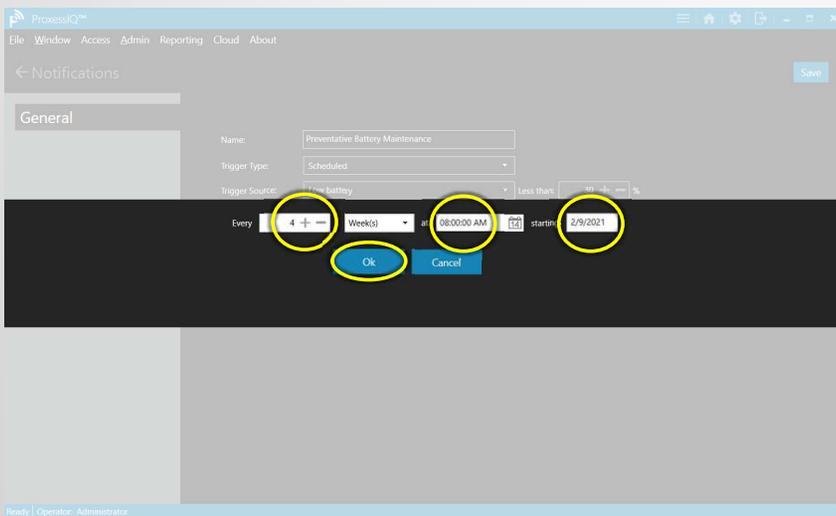
Enter the name for the new Notification. The "Trigger Type" for initiating a Notification is either an instantaneous Event, or one that is Scheduled. The "Trigger Source" list is shown on the right. "Trigger Schedule" is provided to allow different people to receive emails at different times and days. "Time to Live" is the number of minutes you want the Notification to remain valid. In other words, it is the number of minutes from activation until the Notification will expire. Selecting "O" means that the Notification will **Not** expire and will persist until it is attended to. Only one email will be sent per event.



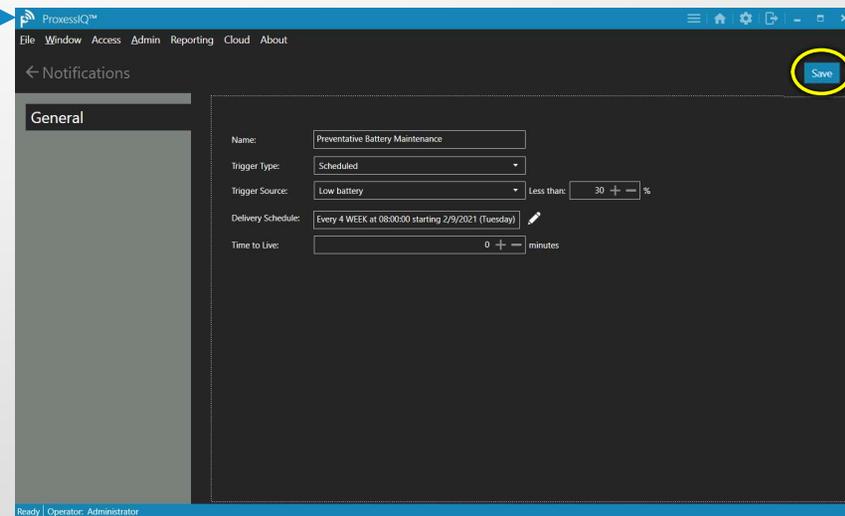
Note: In the following example we will create a Scheduled Notification. For Notifications with the "Trigger Type" selected as an "Event", individual Users/Recipients may be added to be emailed either always, or just for specific days of the week and times of the day.



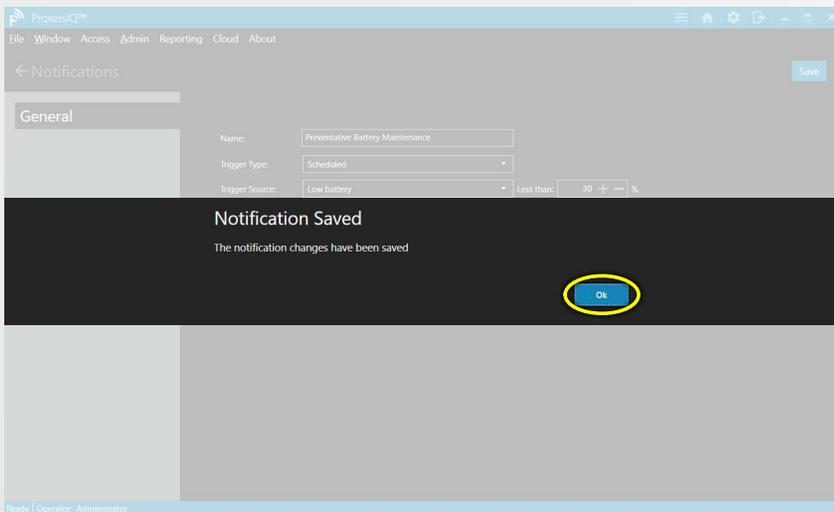
As an example, we will name a new Notification, "Preventative Battery Maintenance". We will select it to be a scheduled event, notifying on any-and-all locksets that have a "Low Battery" level of 30% (This should give you 1 to several months, depending on usage, advance notice before the low-battery LED begins blinking on the locksets). The default time for a scheduled notification is once per week. Click the edit button to change this.



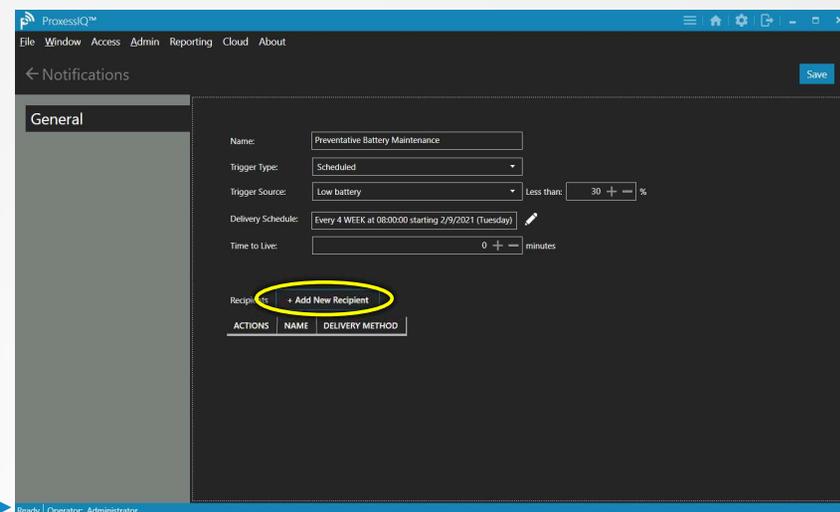
Let's have this email sent out every 4 weeks (click the + & - to change), at 8AM (click there to change), beginning on the date of your choice (click there to change). Click "OK".



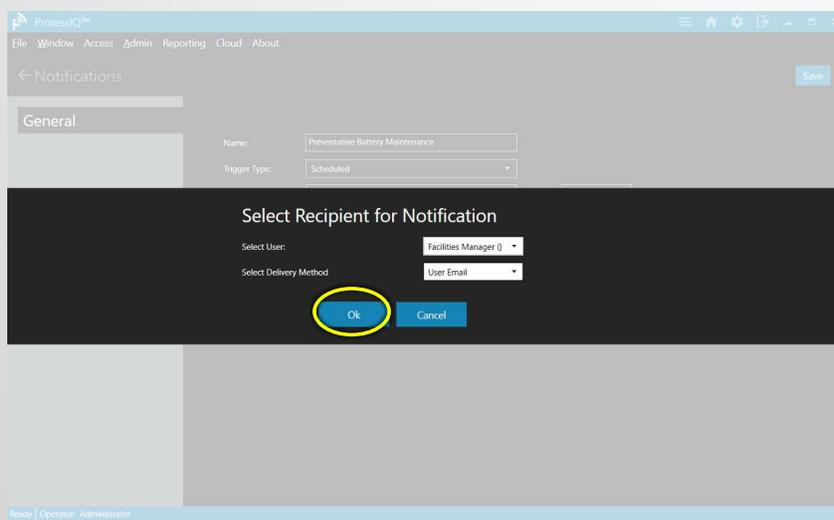
Click on "Save".



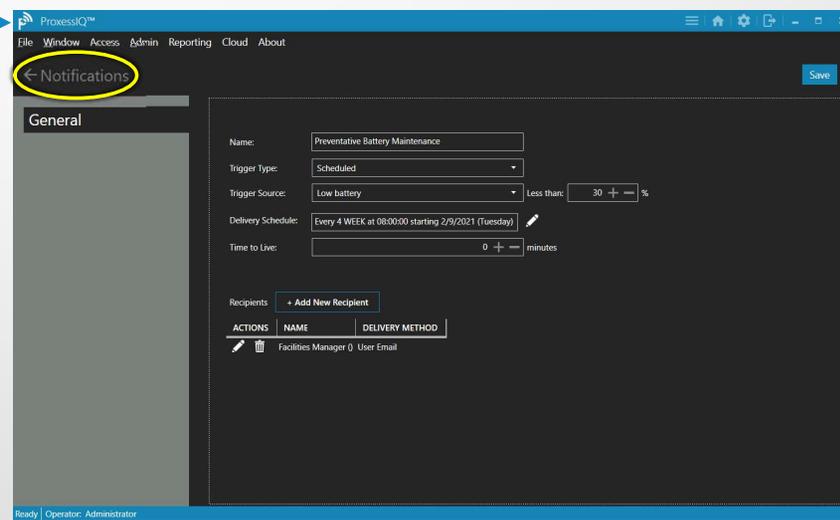
This shows the new Notification has been saved. Click "OK".



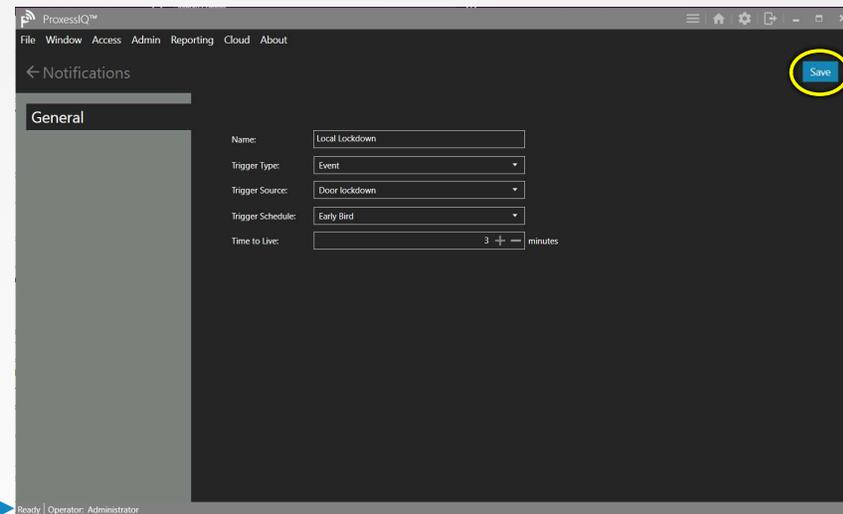
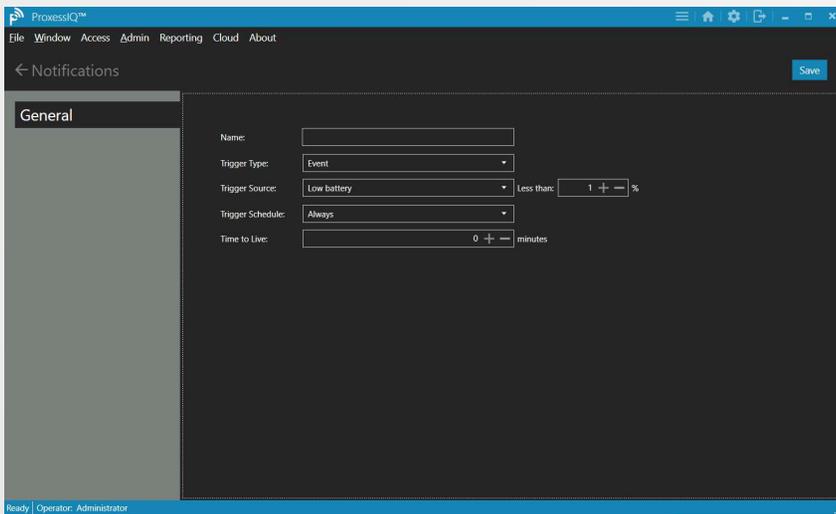
To select someone to receive an email for this Notification (either on a schedule or as it is received in the software), Click "Add a New Recipient".



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".

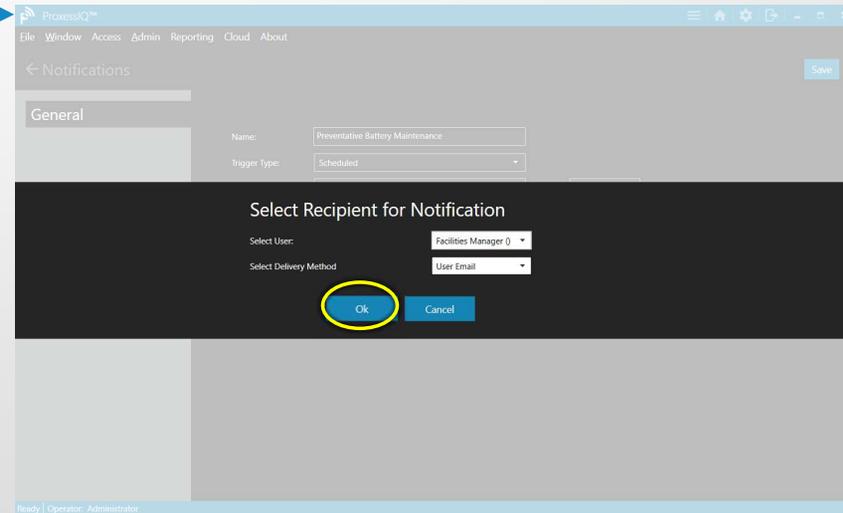
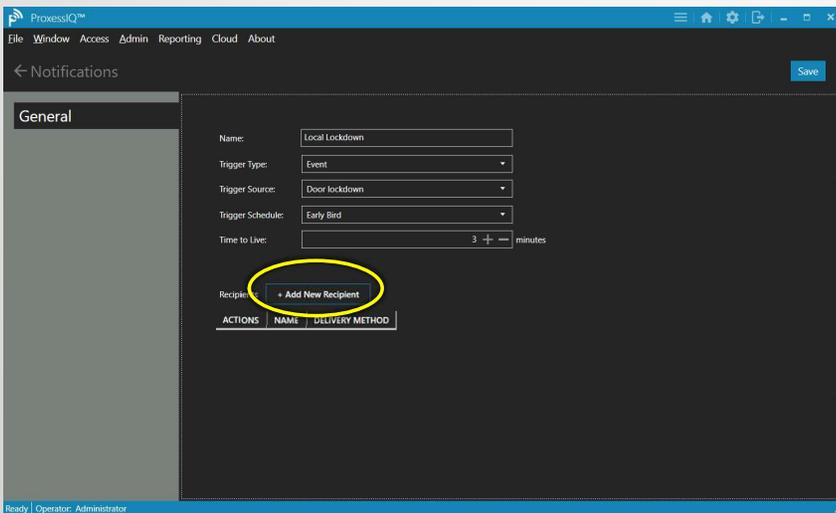


The recipient now appears in the list for this Notification. You may return to the Notifications menu by clicking "← Notifications".



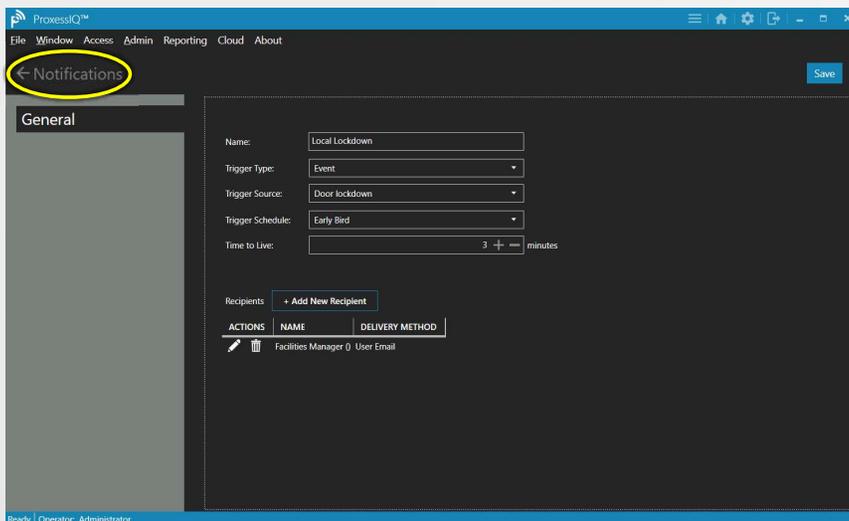
Note: In the following example we will create an Event based Notification. The primary difference from a Scheduled Notification is this: With an Event based Notification, individual Users/Recipients may be added to be emailed either always, or just for specific days of the week and times of the day.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

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".



Click "Add New Recipient".

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".



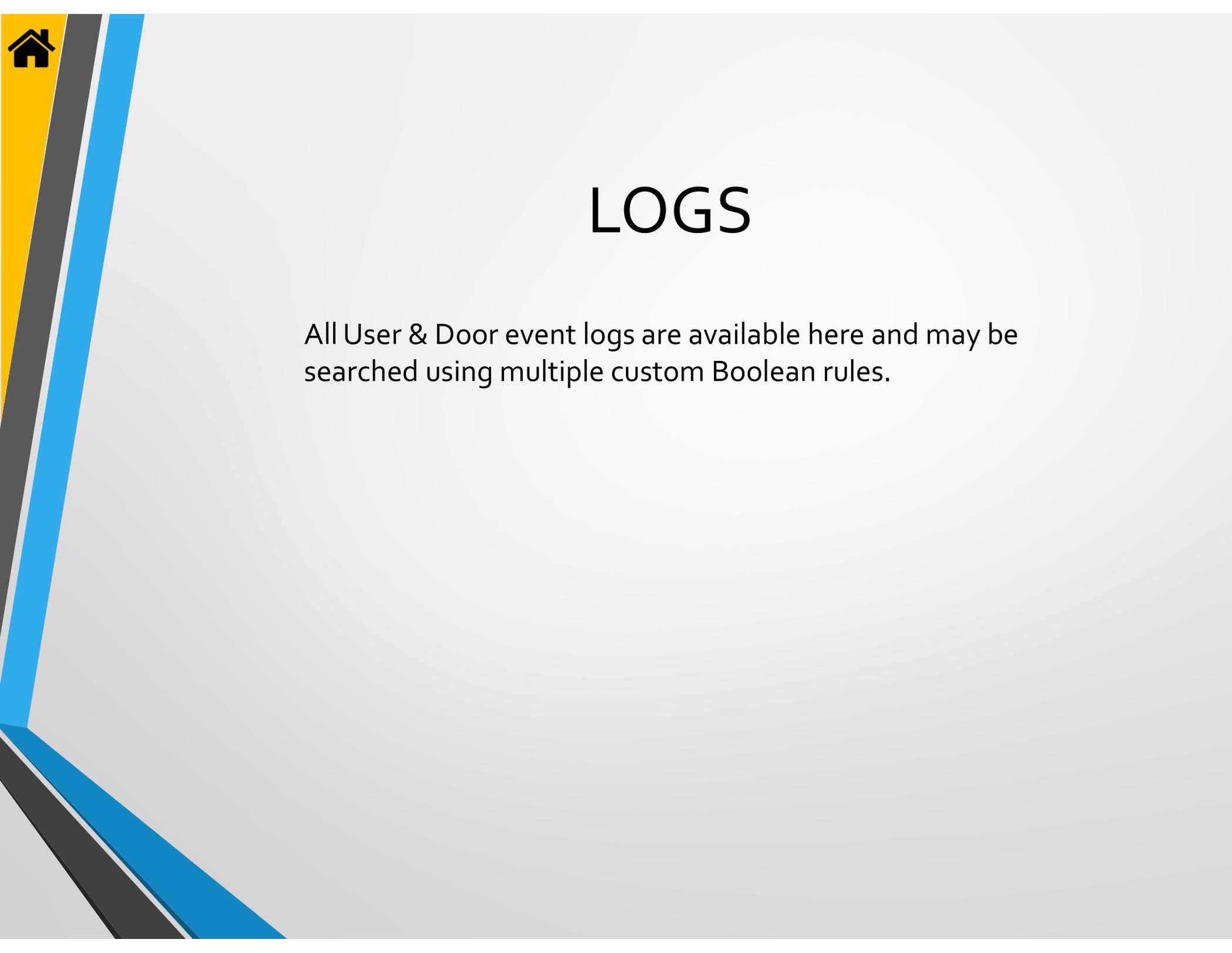
The recipient now appears in the list for this Notification.
You may return to the Notifications menu by clicking
“← Notifications”.



MOBILE CREDENTIALS (Settings)

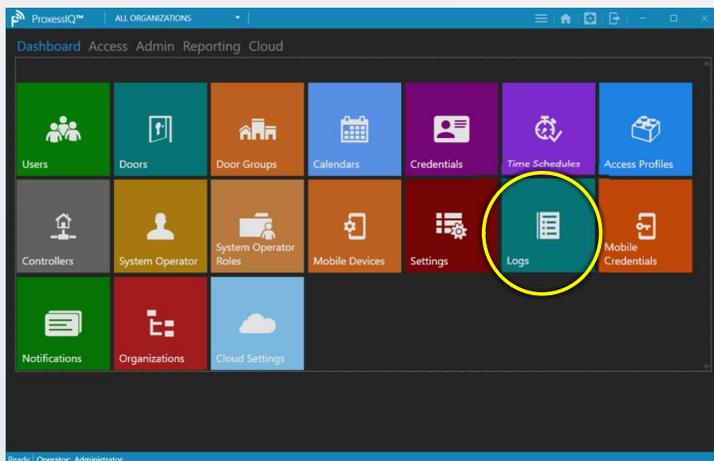


CLOUD (Settings)



LOGS

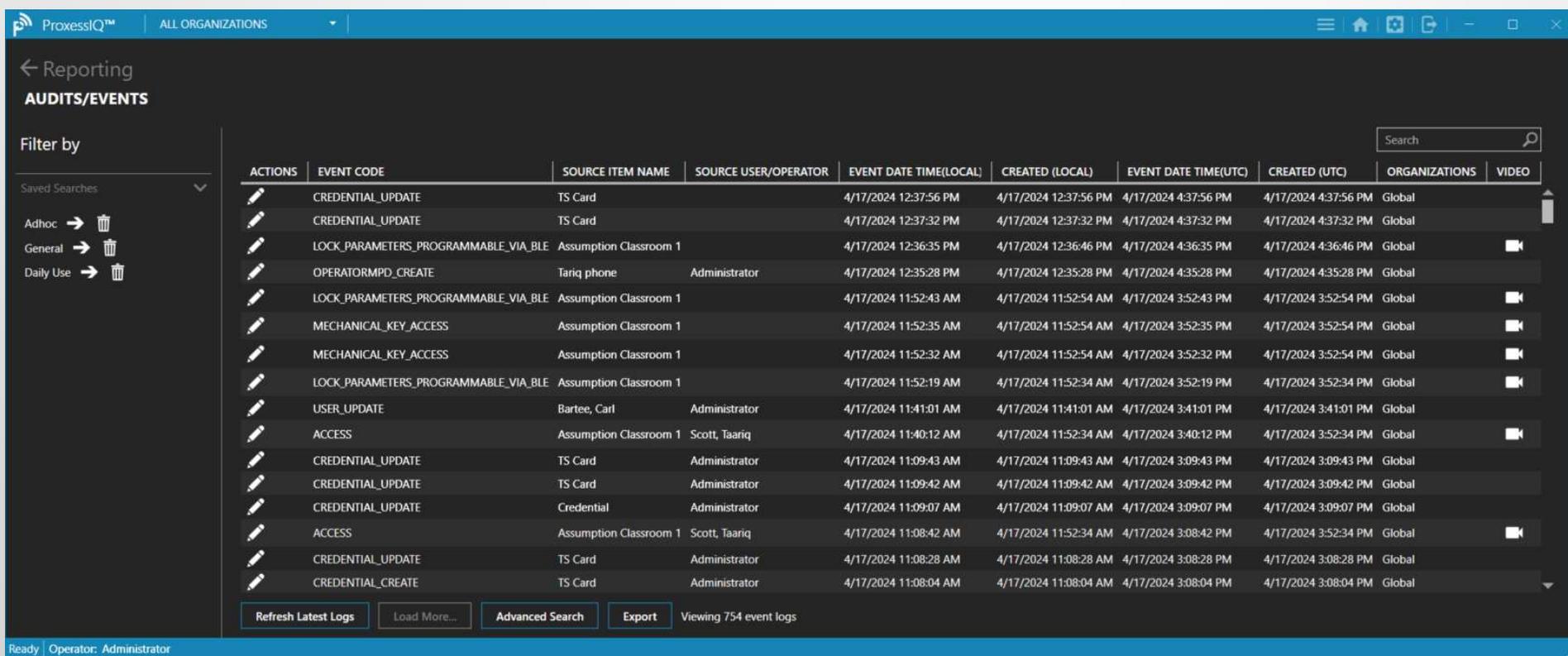
All User & Door event logs are available here and may be searched using multiple custom Boolean rules.



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.



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

EVENT CODE TYPE

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

EVENT SOURCE TYPE

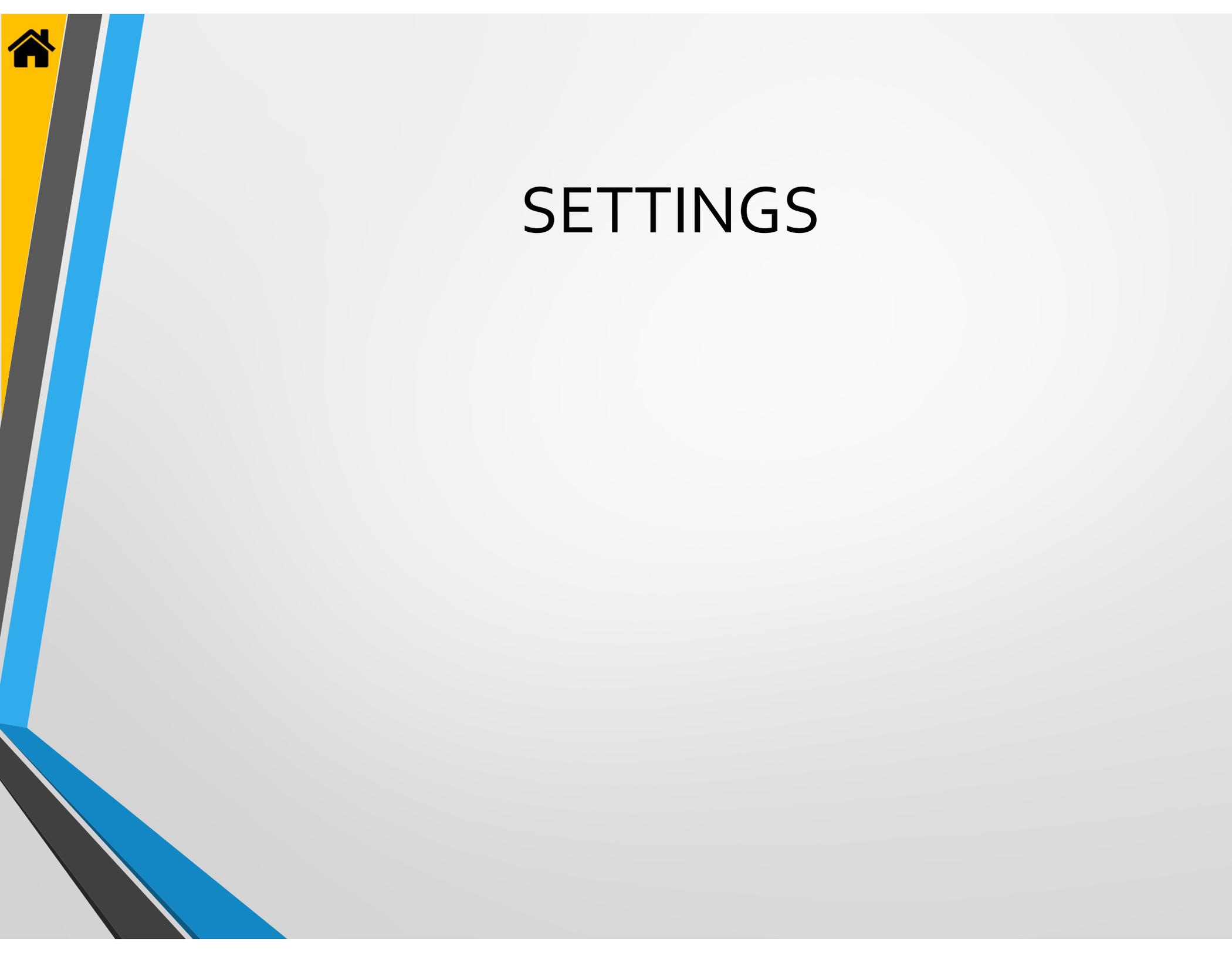
LockAudit
Door
Door Group
User
Credential
Operator
Controller
OperatorMPD
AccessProfile
Calendar
TimeSchedule
AuditLog
OperatorRole
Other

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
User 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



SETTINGS



These tabs show the default settings used throughout the ProxessIQ™ software. Each of them can be customized to your preferences, by site, reader, cardholder and operator. Unless changed, all new devices (i.e. controllers, readers, ...), operators and cardholders will be defaulted to the attributes on these tabs. To change the default settings usage, you may either uncheck the appropriate box on these tabs (which will change all future defaults) or you may uncheck the individual box next to the field that you are configuring elsewhere in the software (which will affect only that device or person).

From the Basic...



Software



Mobile App



Lockset



Credential

To the Complete...

