



# SOFTWARE MANUAL

ProxessIQ™ Software & Proxess Sync™ Mobile App Configuration

# Equipment & Operation: Start-up Guide

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

Here are the minimum required components:

- Minimum Computer Spec (for each ProxessIQ™ server and client), with Windows 10+, Intel Pentium Dual-Core 2GHz, 1 USB input, 4MB RAM, 20GB free disk space
- ProxessIQ™ software Download link
- USB Enrollment Reader
- Android Smart Phone
- Proxess Sync™ Download link
- Network or Internet connection for the PC, depending on the Proxess Sync™ connection method
- Common WiFi connection to ProxessIQ™, or mobile phone plan with connection to the ProxessIQ™ network
- 1 or more locksets (batteries are Not included)
- 4 x standard AA batteries per lockset
- Screwdriver to install lockset in cylindrical door prep, or also drill 1/4" hole for mortise lockset
- Proxess smart credentials (cards, stickers, fobs)

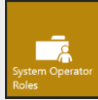
Here is the basic operational sequence:

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

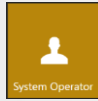
# Quick Start Guide (Page 1 of 2)



- **Software Installation:** Install ProxessIQ™ software from [www.Proxess.com/Support](http://www.Proxess.com/Support).



- **System Operator Roles:** Define the grouping for view\edit\delete rights for each software module.



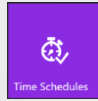
- **System Operators:** Add operators into an Operator Role. Modify\personalize their role.



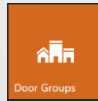
- **Mobile Devices:** Add mobile phones which will operate the Proxess Sync simple configuration App.



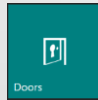
- **Proxess Sync™:** Sign in and enable the Proxess Sync™ simple configuration App on your Android Mobile Phone.



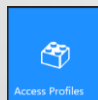
- **Time Schedules:** Create the days and times that locks and doors will operate with credentials and remain locked or unlocked.



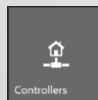
- **Door Groups:** Create groups of Doors, for more easily assigning access rights to users.



- **Doors:** Add wireless locksets into the system.

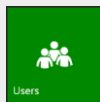


- **Access Profiles:** Create groupings combining Time Schedules with Doors and Door Groups.



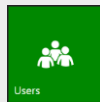
- **Controllers:** Define online\checkpoint doors\readers.

# Quick Start Guide (Page 2 of 2)



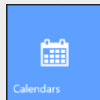
Users

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



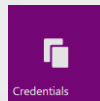
Users

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



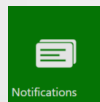
Calendars

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



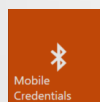
Credentials

- **Credentials:** Simpler management utility for credentials, after a User is created in Users menu. Credentials may still be managed in Users menu.



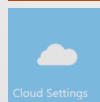
Notifications

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



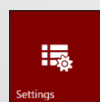
Mobile  
Credentials

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



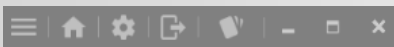
Cloud Settings

- **Cloud Settings:** Communications management between ProxessIQ server and the Mobile Credential Cloud.



Settings

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



- **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](http://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.

Primary computer ("Server"):

Install "**Proxess-Server-Installer-LocalDB-Bundle.exe**"



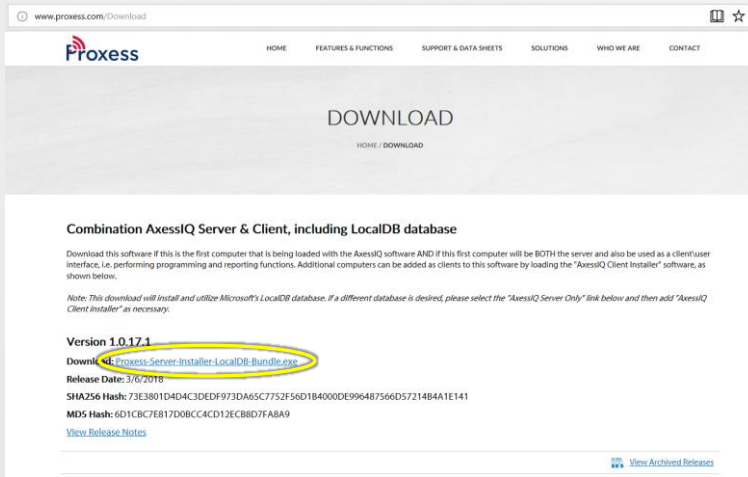
Additional computers ("Clients"):

Install "**Proxess-Installer-Client.msi**"

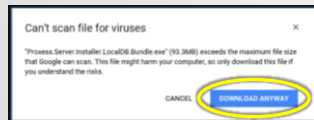




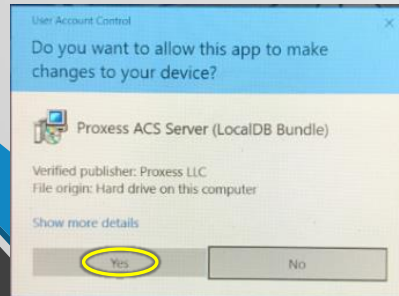
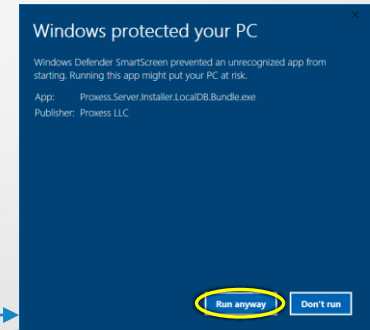
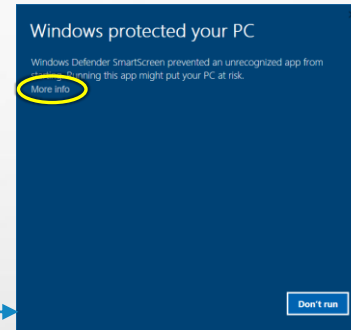
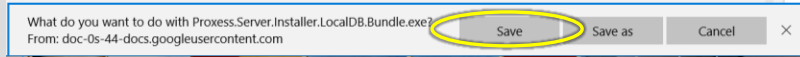
# ProxessIQ™ Software Download & Installation 2



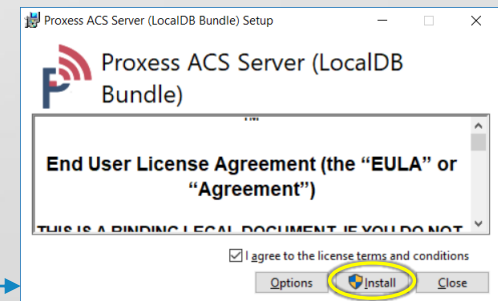
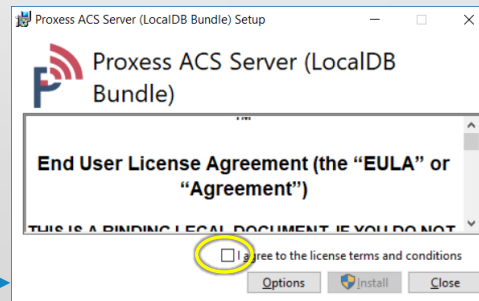
Locate the download link provided at [www.Proxess.com/Downloads](http://www.Proxess.com/Downloads) or which has been emailed or otherwise provided to you by the Proxess Support staff or Sales team. For a system that will use the Proxess built-in "LocalDB" database (a Microsoft database product), you will install the file "Proxess-Server-Installer-LocalDB-Bundle.exe" (can only be installed on one computer per system). Double-click on "**Proxess-Server-Installer-LocalDB-Bundle.exe**" and then click on "Download" on the screen that opens.



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

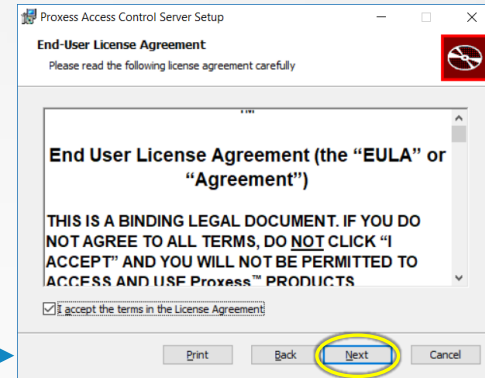
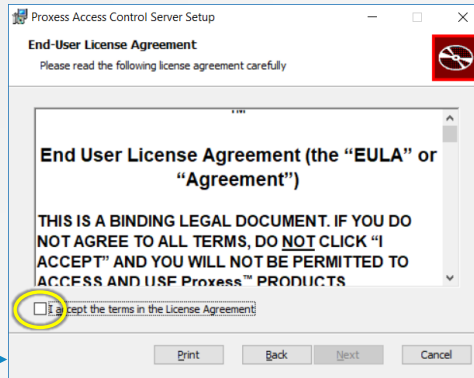
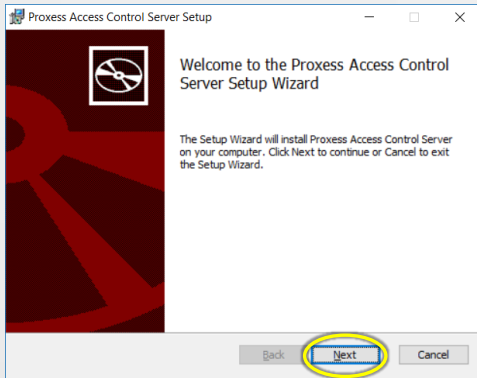


The icon below may blink in your computer's taskbar. If so, click on it to proceed.

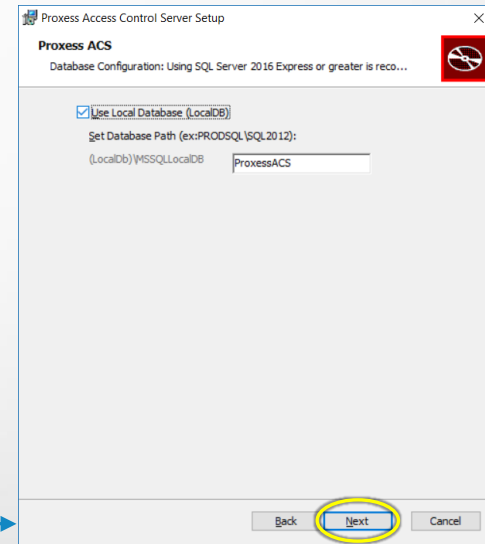
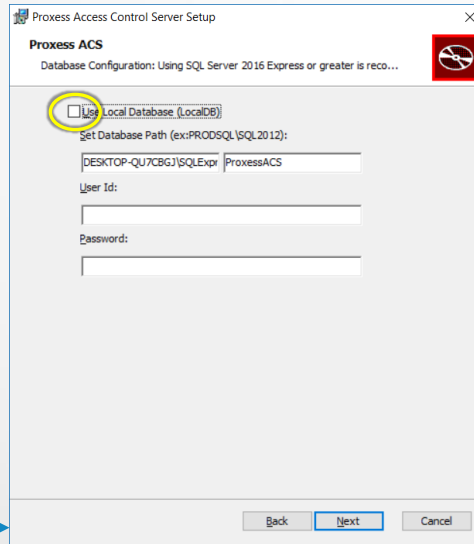
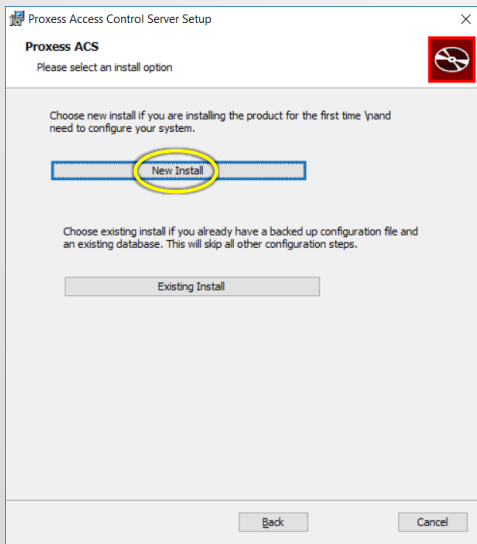




# ProressIQ™ Software Download & Installation 3



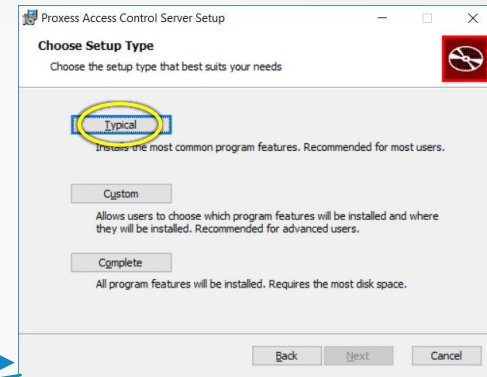
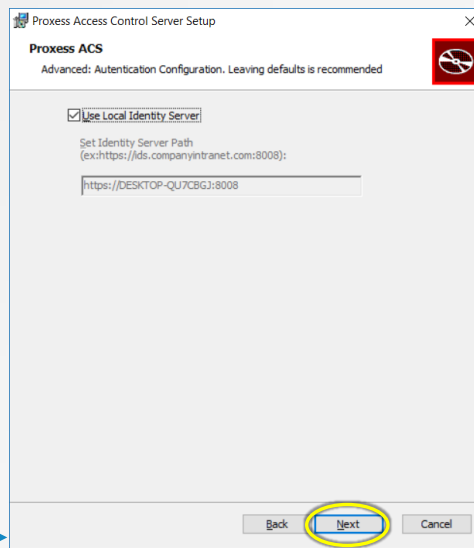
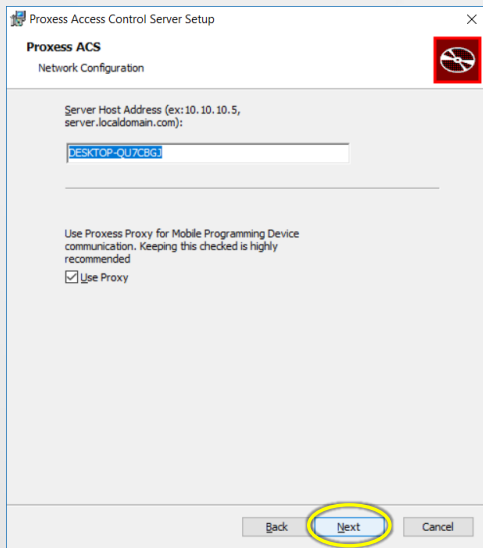
Continue following the windows that open and the prompts that appear on this page.



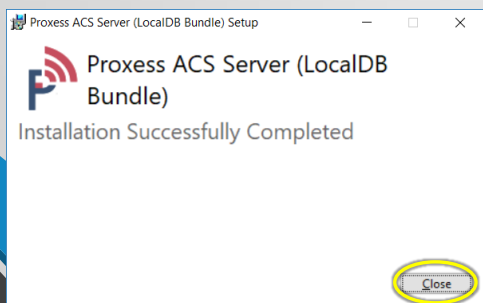
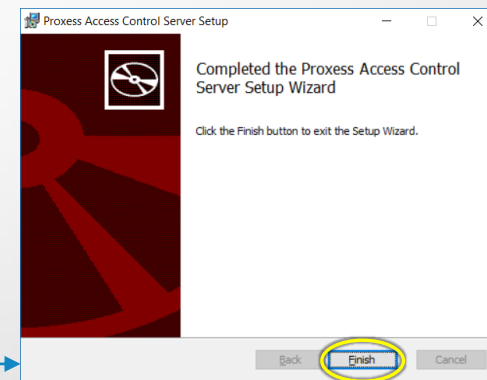
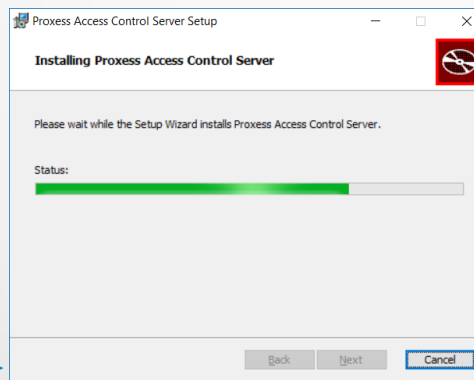
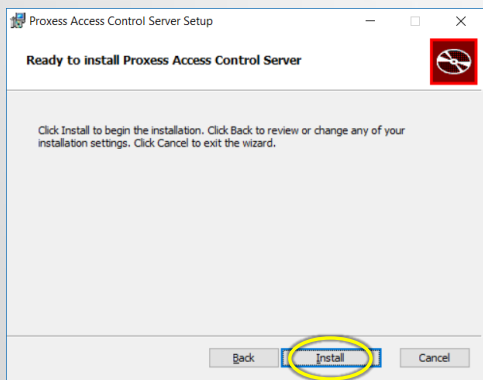


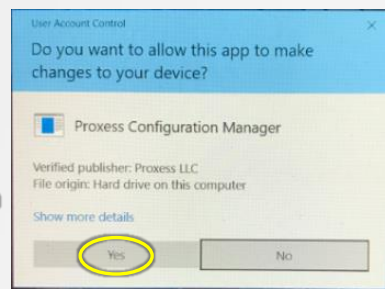
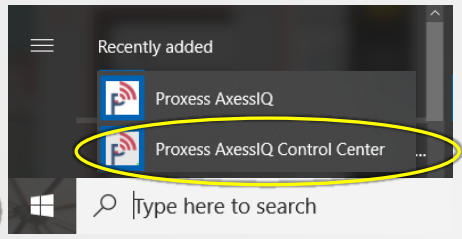


# ProxessIQ™ Software Download & Installation 4



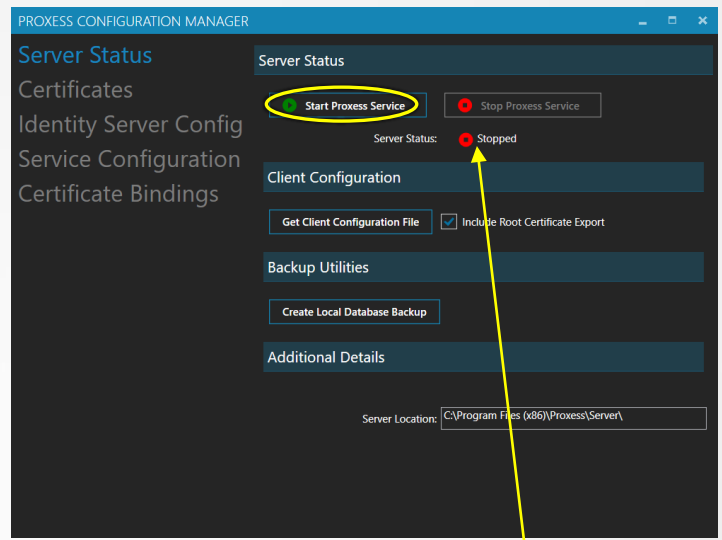
Continue following the windows that open and the prompts that appear on this page.



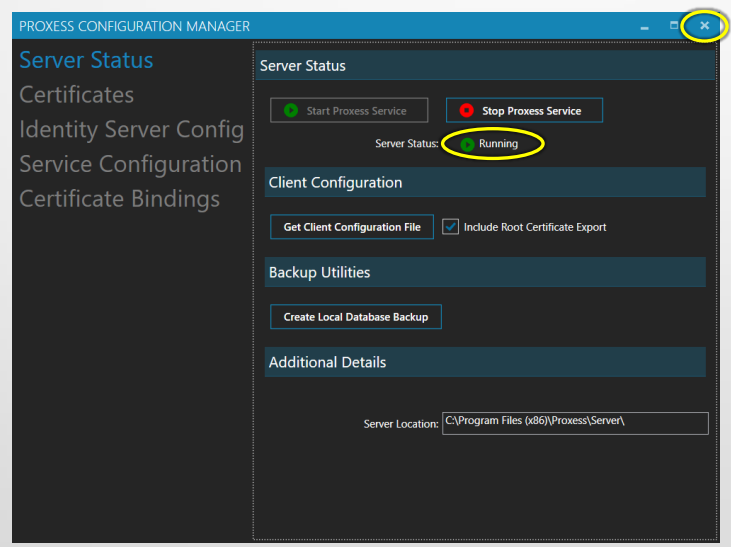


Both the "Server" and "Client" portions of the software have now been installed on your computer. It is good practice to follow the steps on this page, which will assure that the essential Server services are running on this computer.

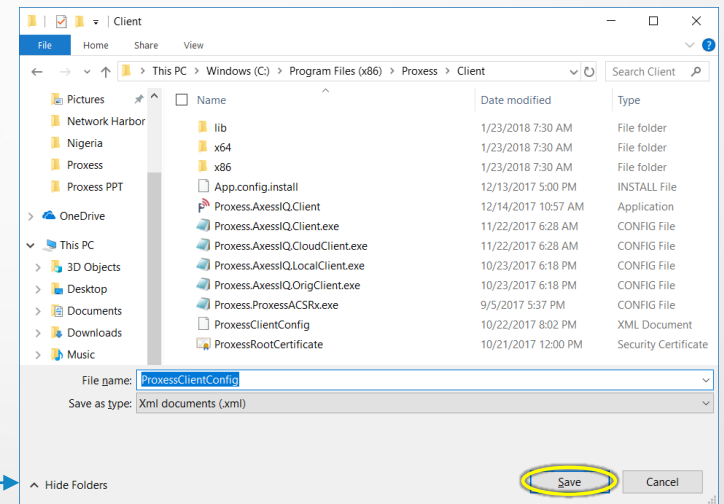
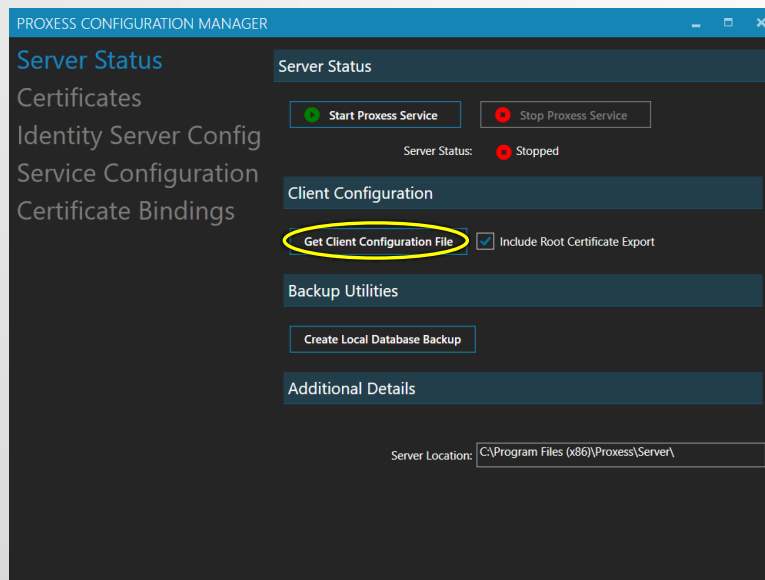
Press the Windows™ icon on the keyboard or click on the Windows™ icon on the left side of the Taskbar on the bottom of your screen. Locate and click on the "Proxess ProxessIQ Control Center", which will be in both the "Recently Added" section of the pop-up list of programs, as well as under the "P" section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



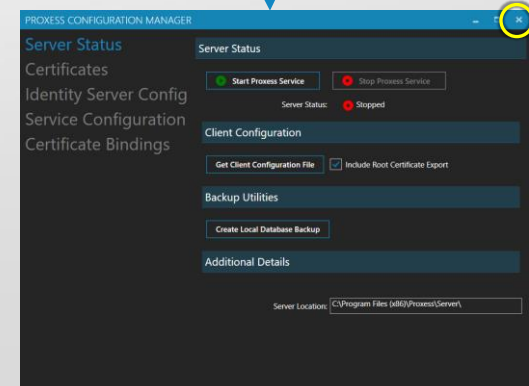
The above screen will open. If the Server Status is shown as "Stopped" then click on "Start Proxess Services".

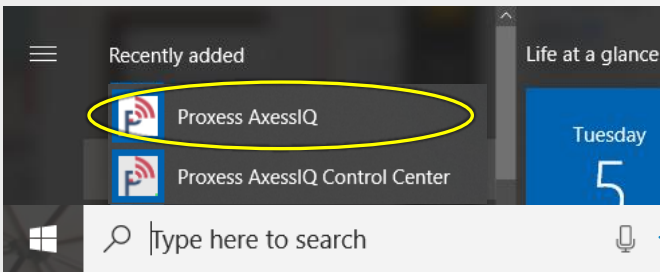


Usually within several seconds (and upwards of about a minute) after clicking "Start Proxess Services" the Server Status will change to "Running". We will now proceed to initiate the software.

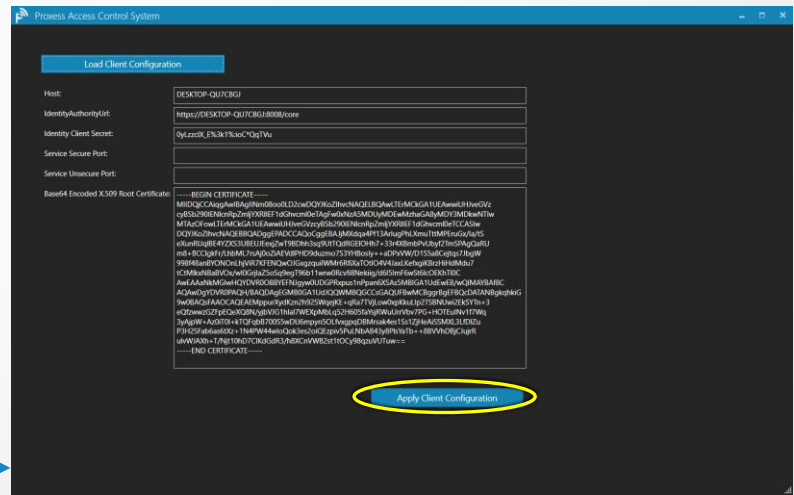
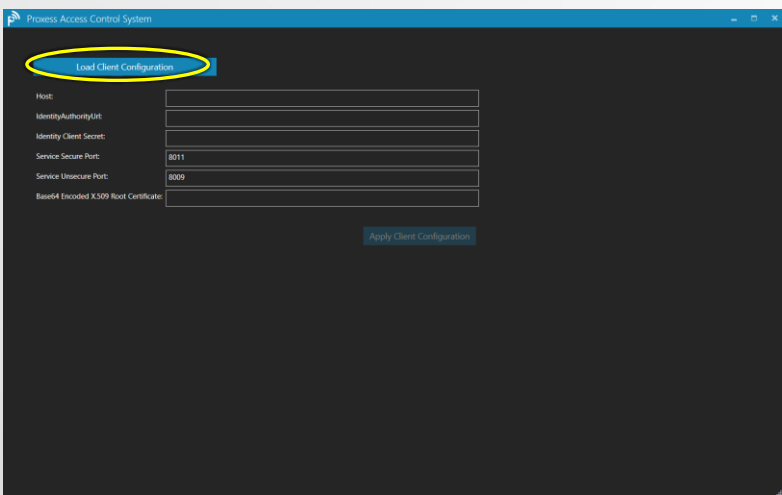
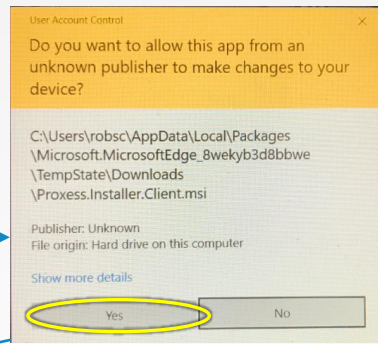


Click the "Get Client Configuration File" button.  
On the "Save As" screen, navigate to the following (preferable) folder location to save the file in:  
"This PC \ Windows (C) \ Program Files (x86) \ Proxess \ Client".  
Click the "Save" button.  
Click on the "x" on the top right of the Proxess Configuration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

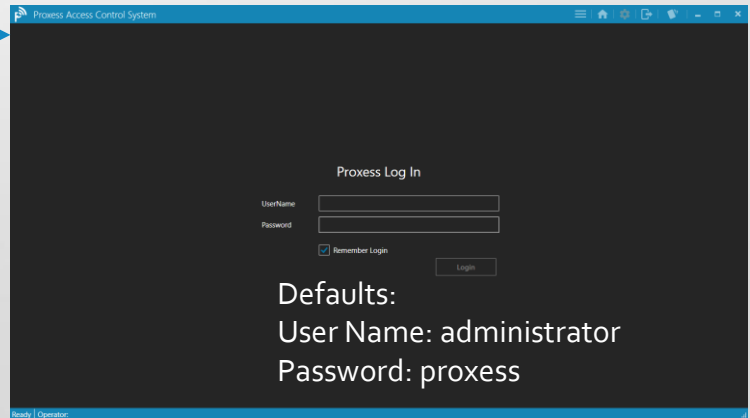
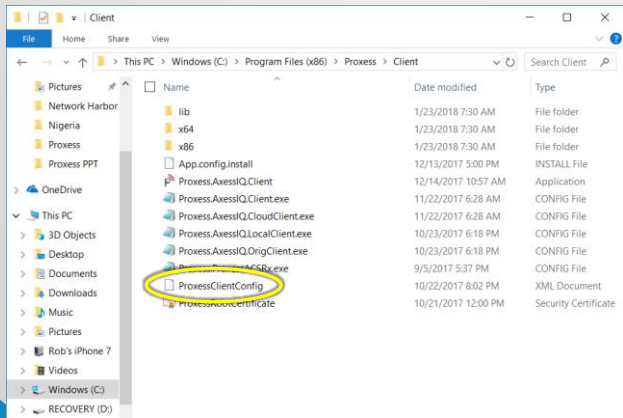




Click the "Windows" icon on your computer and select the "Process ProxessIQ" program and allow the app to make changes to your device.



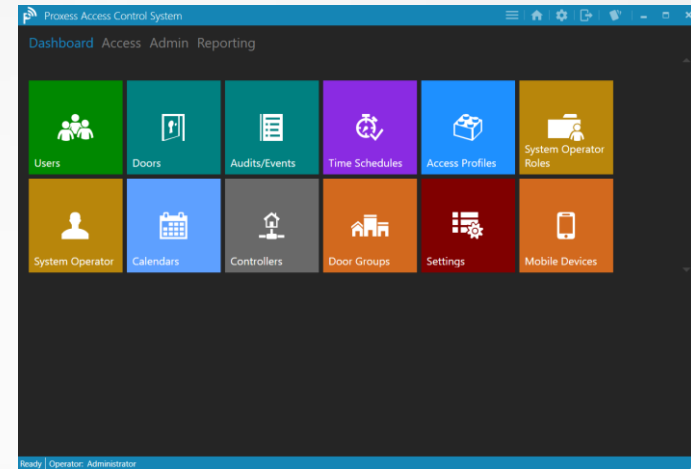
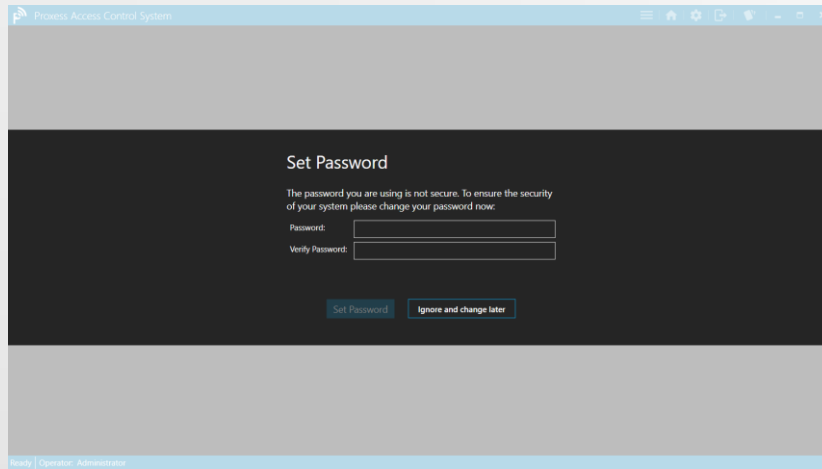
**NOTE:** Other than as stated here, do not make any changes to these screens. Click the "Load Client Configuration" button on the first screen. You may be asked to search for the Configuration file, which may be found in the file you saved it in (shown below). Click on it. On the next screen, click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



Defaults:  
User Name: administrator  
Password: proxess



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





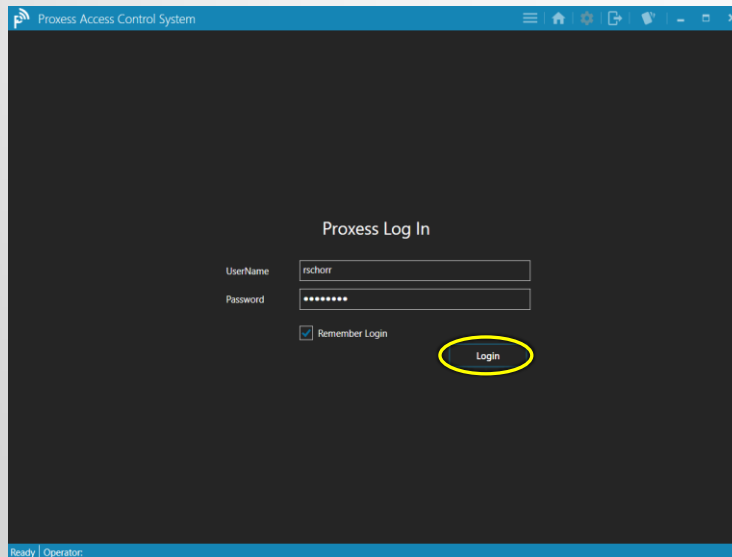
# Begin Programming ProxessIQ™

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



# Opening the ProxessIQ™ Software

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

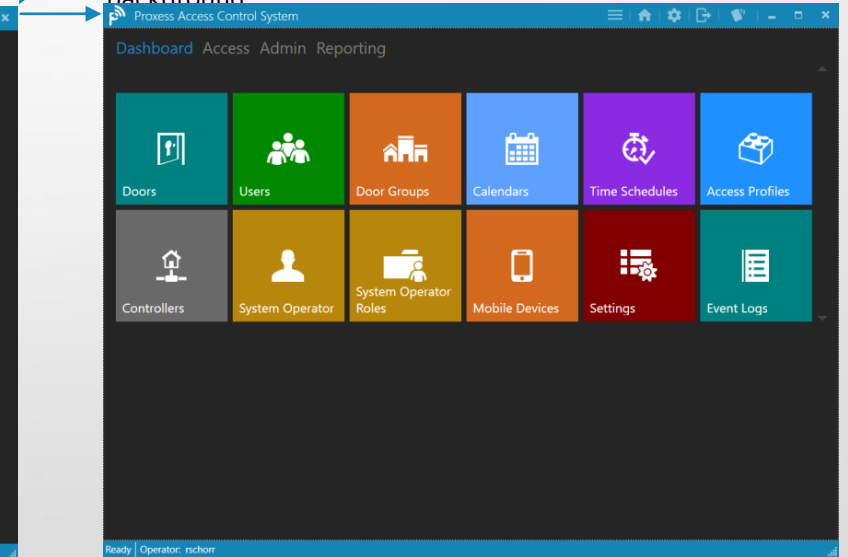


The Login screen will appear after a short background start-up. Enter the default operator credentials you have been given. For security, be sure to immediately delete these credentials and add new personal credentials. Click on Login.



Computer Desktop & Task Bar

After installing the ProxessIQ™ software, you may add the icon to your taskbar and/or desktop. Click on one of those icons to start the software and background services. The software should always remain operating, even if it is just in the background.



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

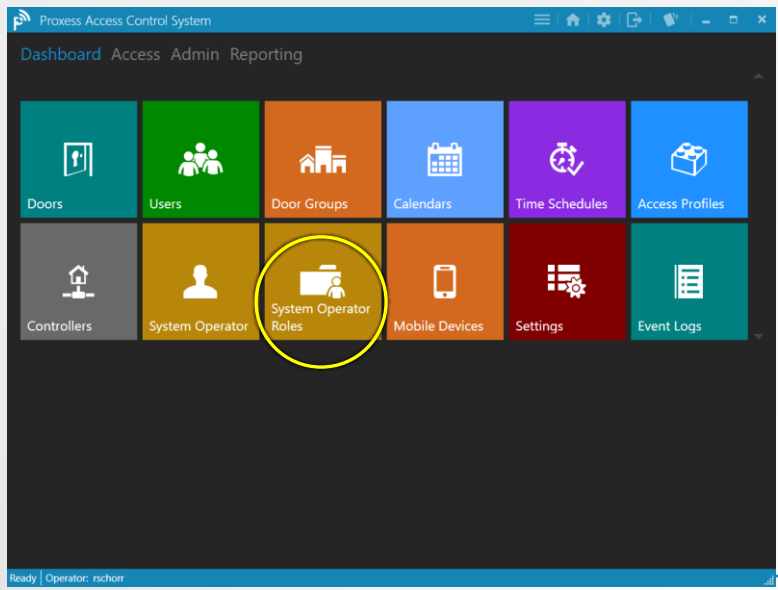


# OPERATOR ROLES

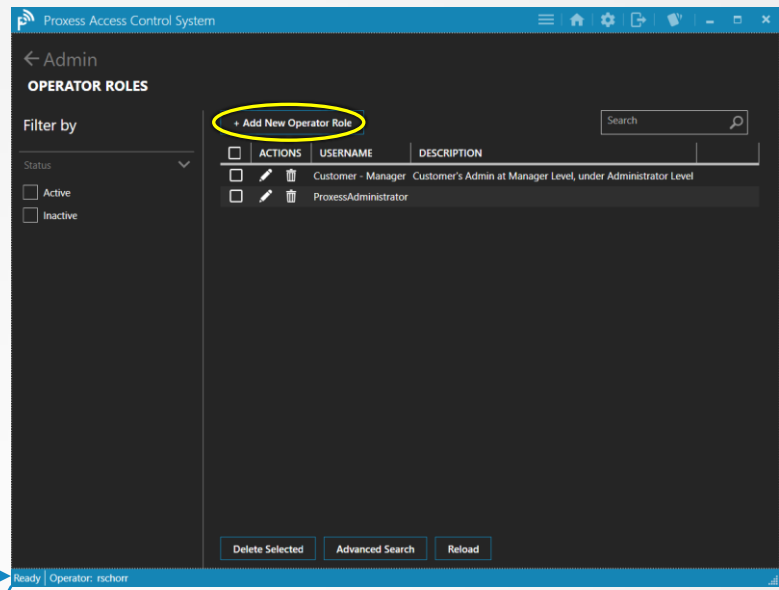




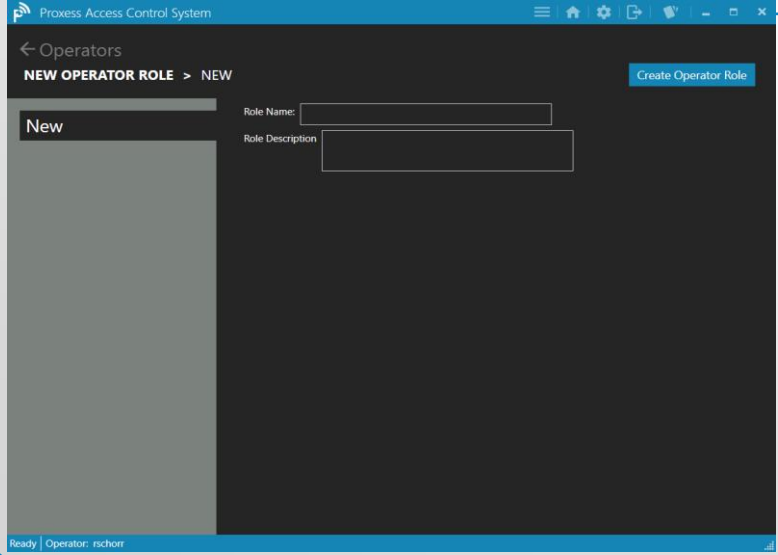
# Operator Roles - 1



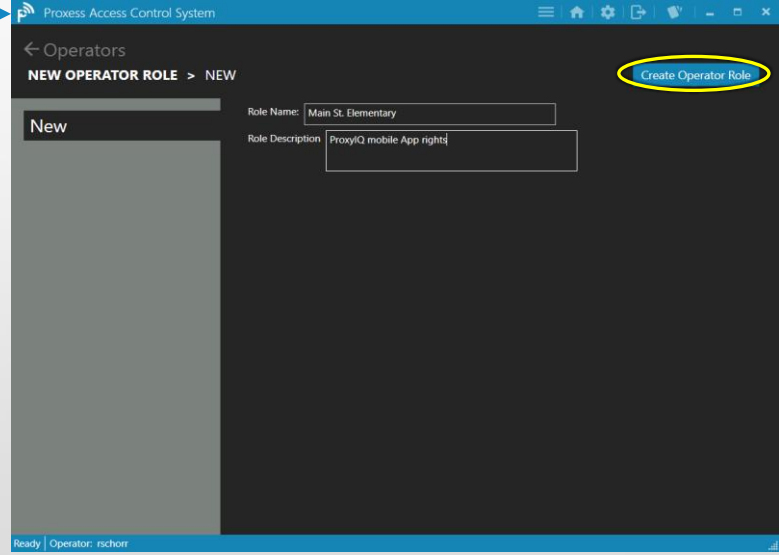
Operator Roles define what Modules (the large icons) Operators will have access to and what actions they will be able to perform once in that section. Click "System Operator Roles".



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.



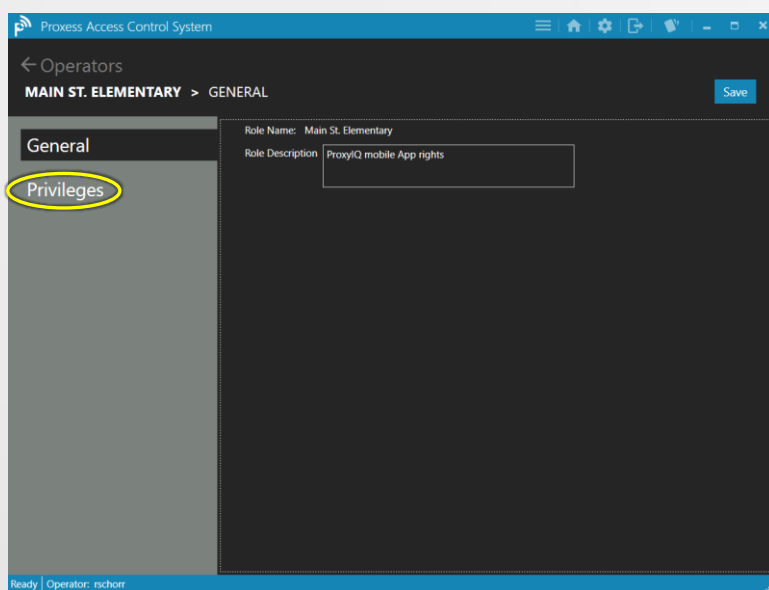
The following screen will open, for creation of the new Operator Role.



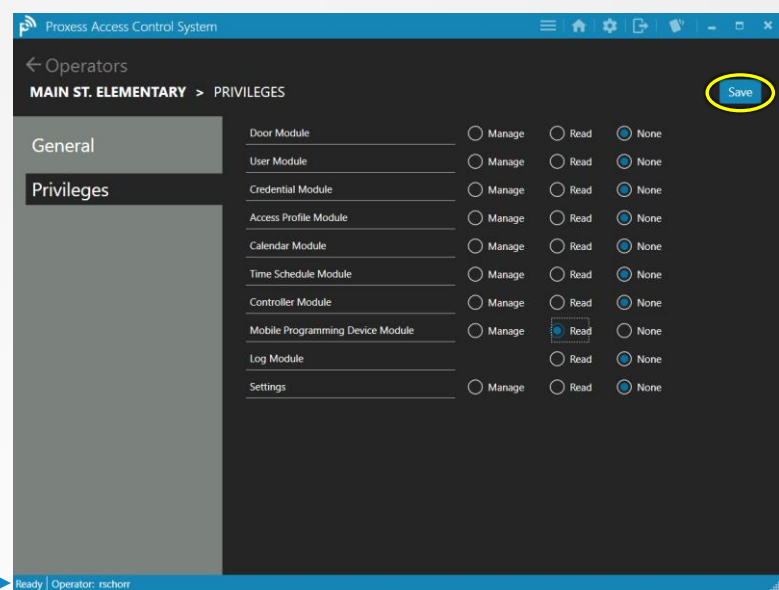
Enter a descriptive name for the Role, considering all the future possible names that may be in your system, to avoid future naming conflicts. You may add any descriptions that may assist you and the team. Click on the Create button when complete.



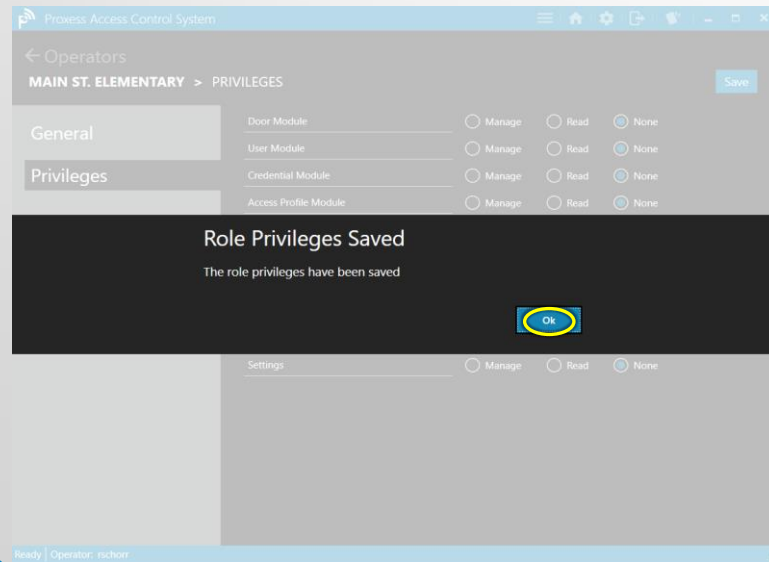
# Operator Roles - 2



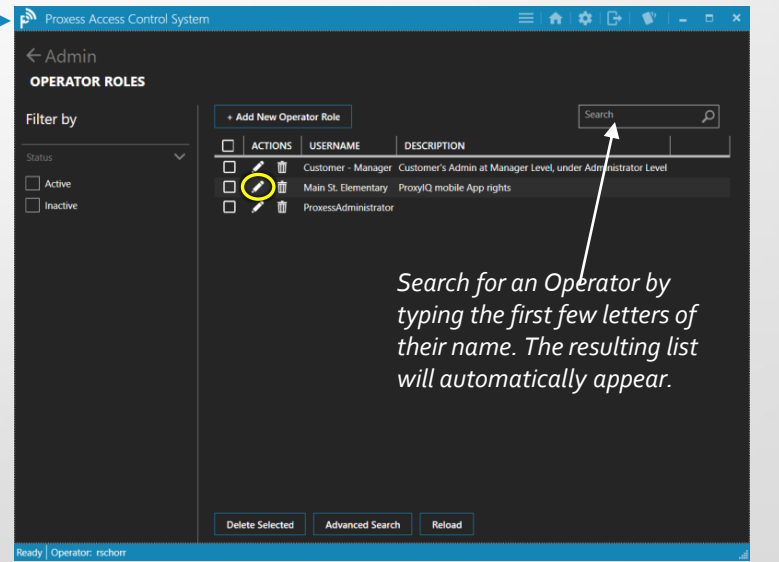
Once the new Role has been created, click on the Privileges button to define their modules and rights access.



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.

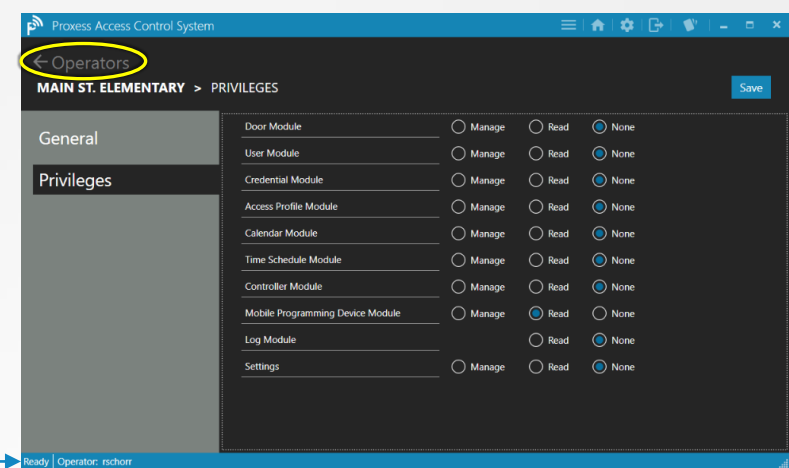
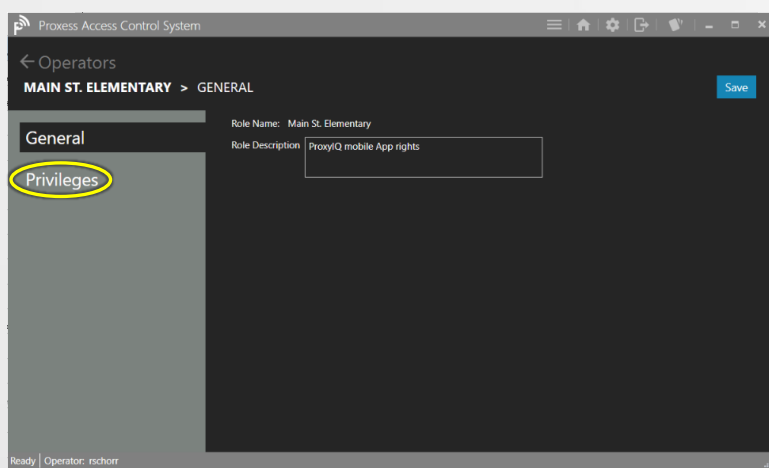


The above screen appears. Click "OK".



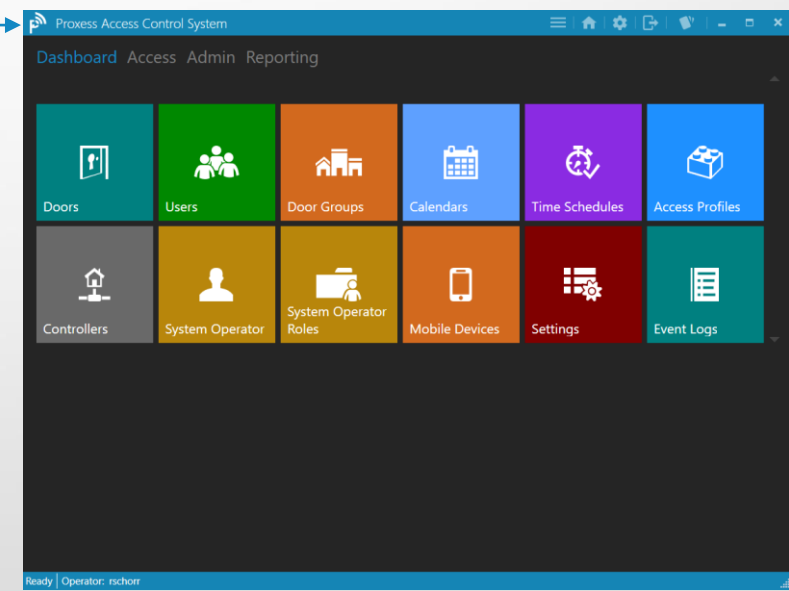
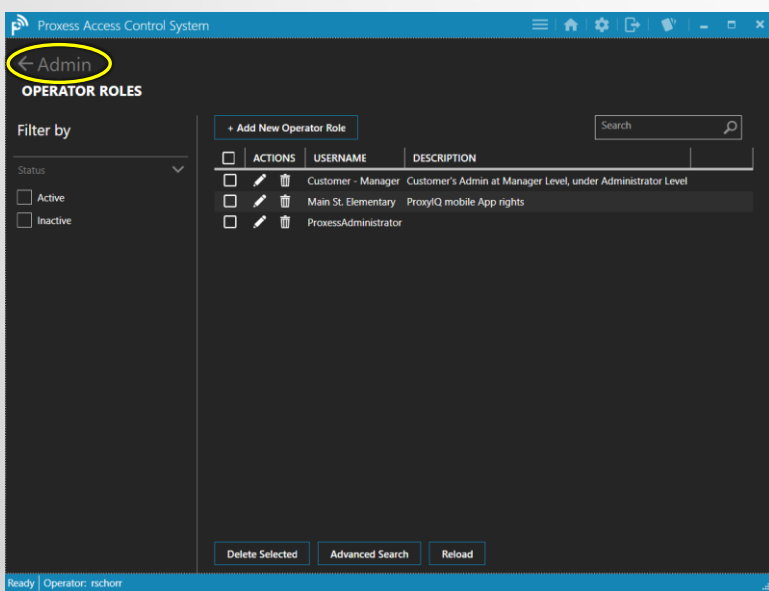
*Search for an Operator by typing the first few letters of their name. The resulting list will automatically appear.*

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



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

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

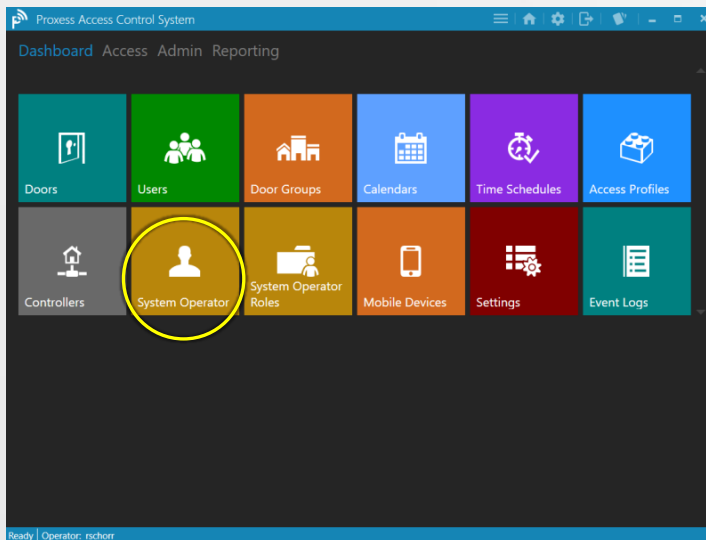


The main Operator Roles screen appears. Click on the "Admin" tag to return to your Home view.

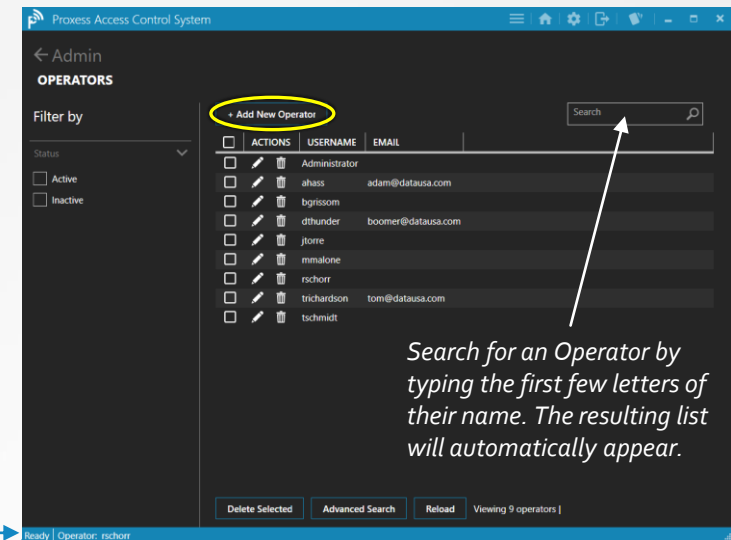
You will be returned to your Home Screen \ Dashboard.



# OPERATORS

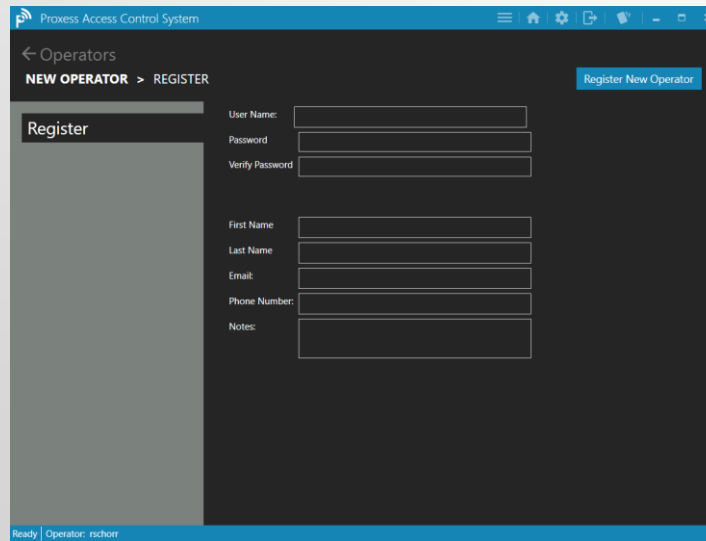


From the Home Screen (Dashboard) click on the System Operators icon, where you will be able to add and modify individual operators\programmers, including assigning them to one or more Operator Groups.

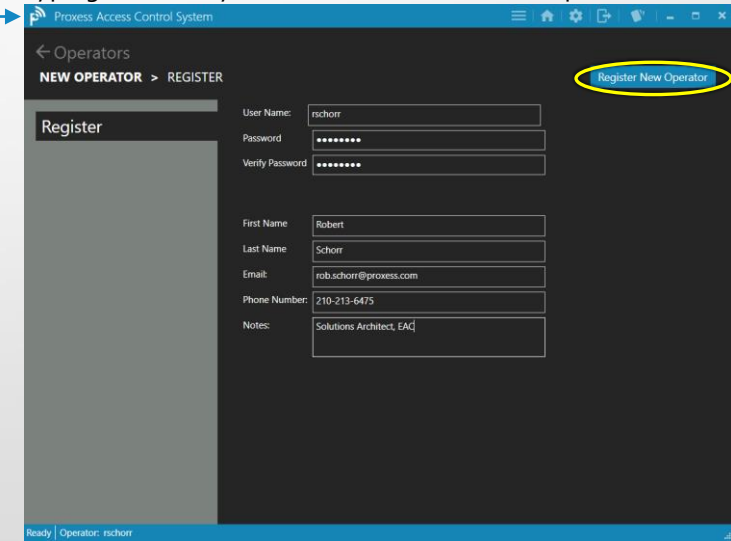


*Search for an Operator by typing the first few letters of their name. The resulting list will automatically appear.*

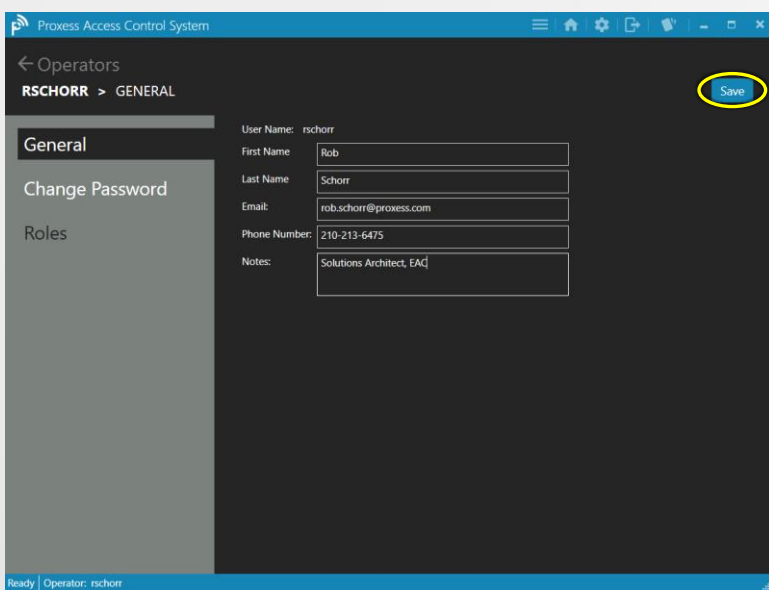
Click on "Add New Operator" to perform this action. Other options on this page allow editing and deleting existing Operators and filtering down a longer list of Operators, using the Filter checkboxes, for Active and Inactive Operators, on the left side of the page. Or, search for a specific Operator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



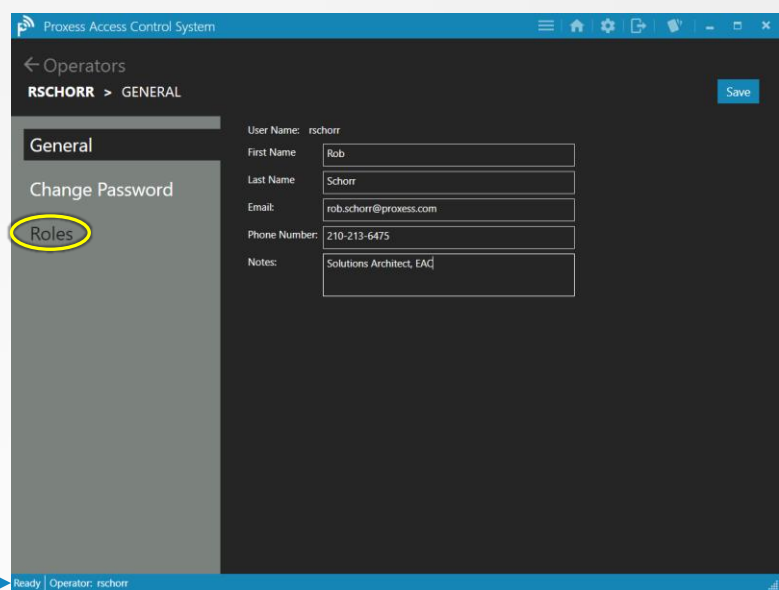
The main New Operator screen appears, showing the mandatory and optional fields. You may click on the "Operators" tag to return to the main Operators list.



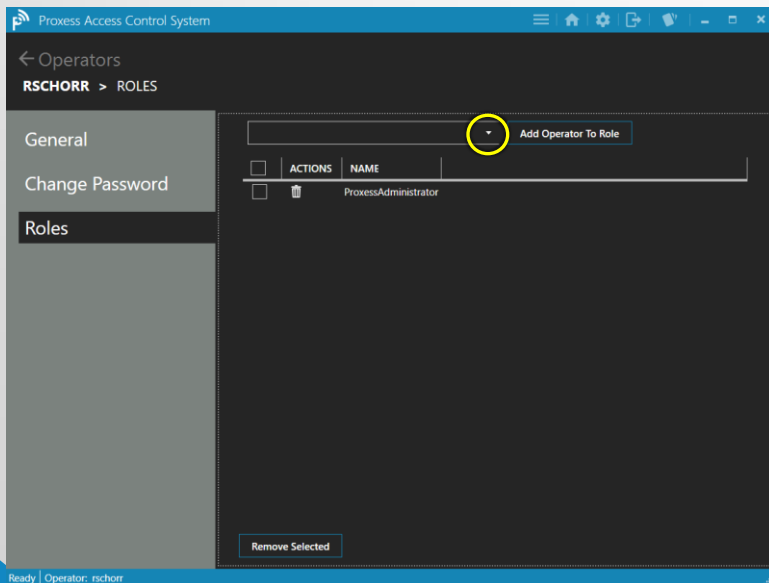
Create a case-sensitive User Name and Password, ensuring to verify the password exactly. No spaces are permitted in these fields. Enter a first and last name and a valid email, for use in later modules. The phone number and notes are optional. Click Register when complete.



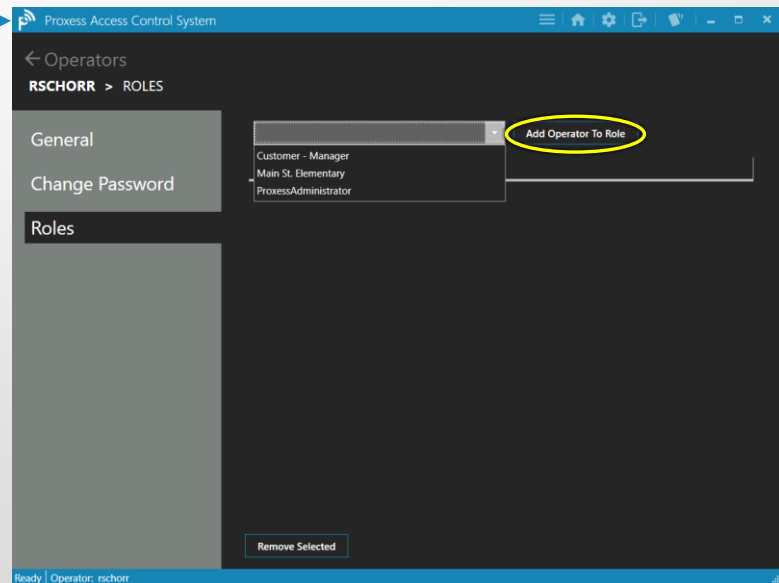
The details for the Operator which you have just registered will appear. You may edit these details, including clicking on "Change Password" to do so, or click "Save".



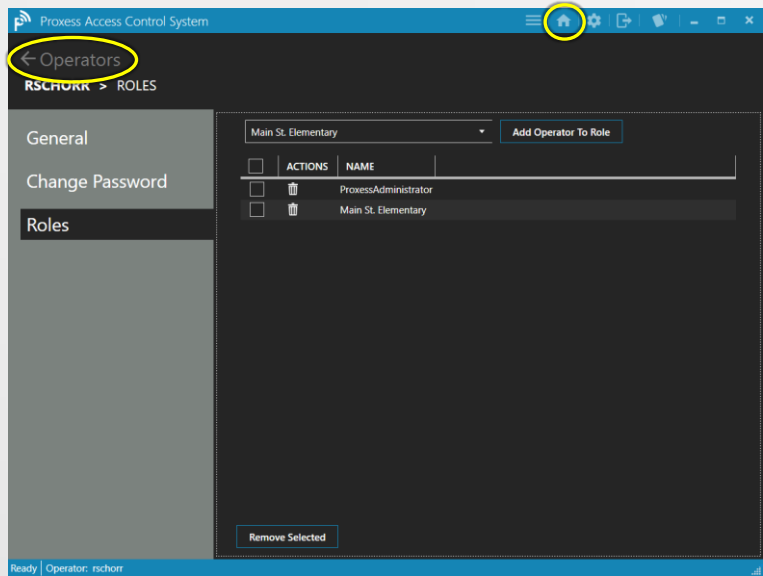
Click on the Roles button to assign this individual to a category of rights within the software.



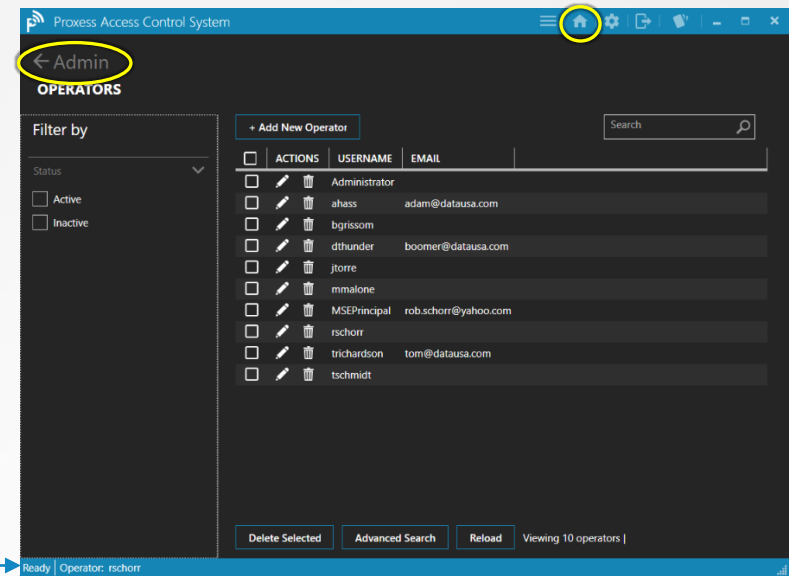
The existing list of Operator Roles that have been allocated to this Operator is displayed, which may be deleted. To add more Roles, click the dropdown arrow to reveal the full list of Operator Roles.



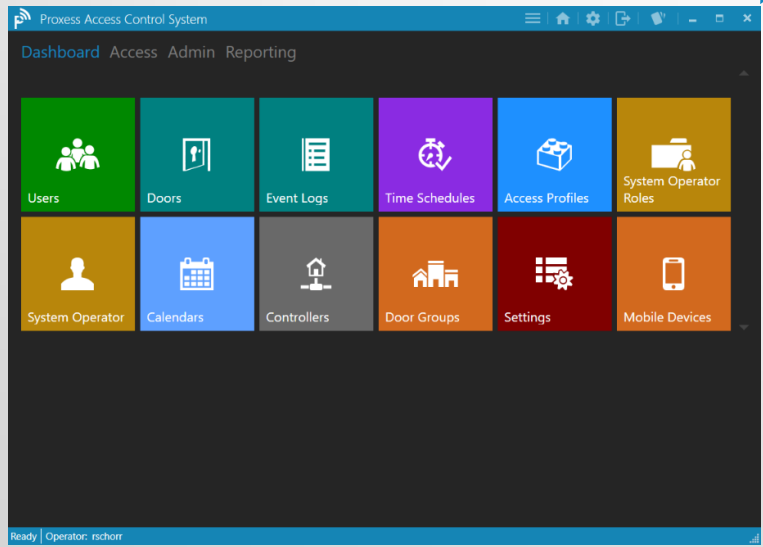
Select an additional or initial Operator Role to apply to this Operator.



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



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



You have returned to the Dashboard \ Home Screen.

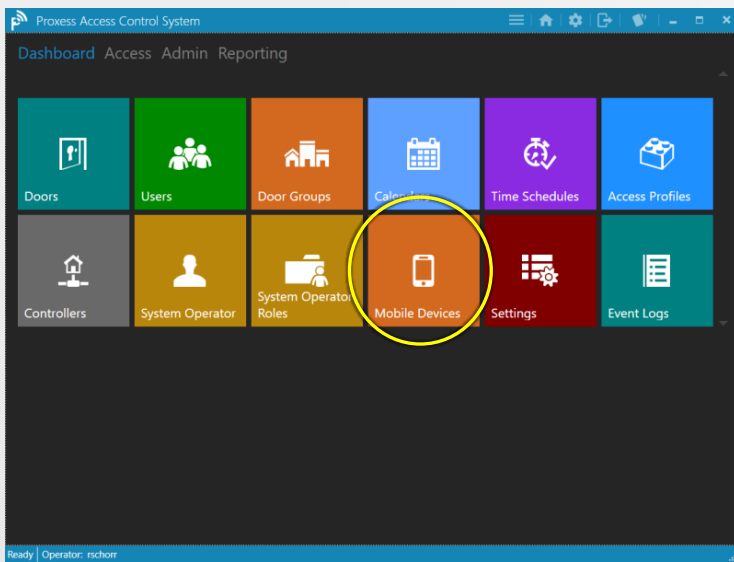


# MOBILE DEVICES

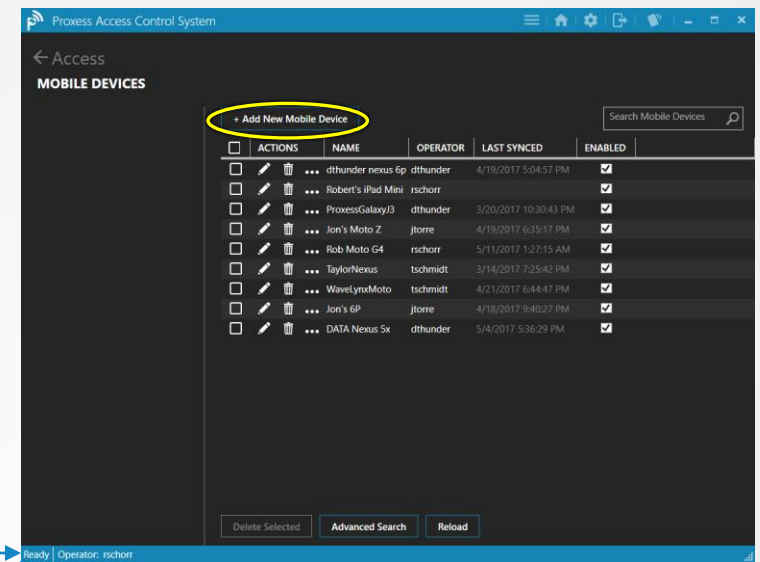




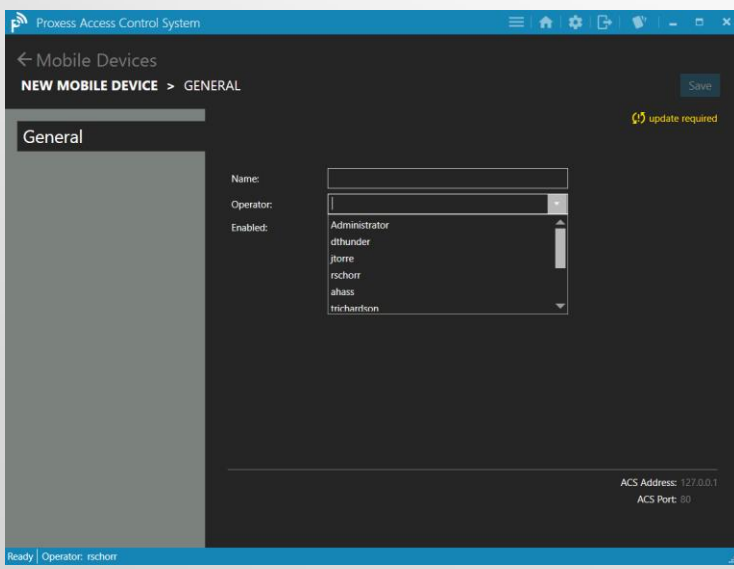
# Mobile Devices - 1



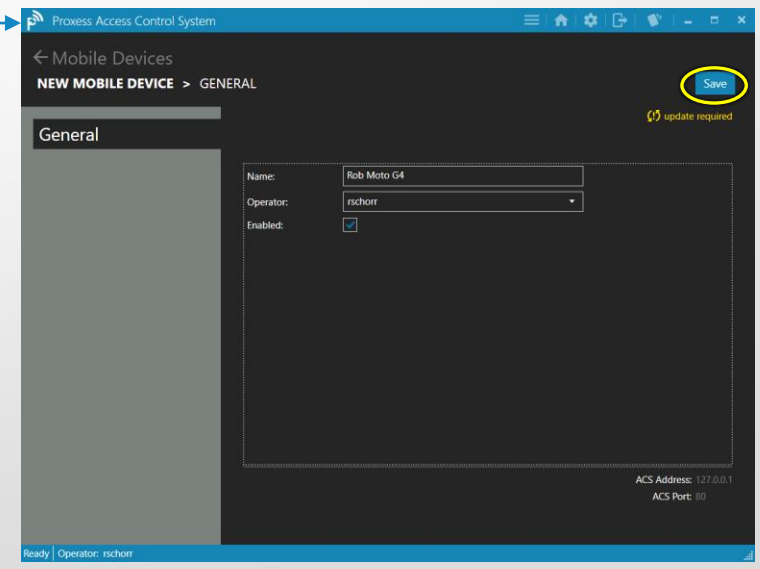
To add a new (and manage existing) mobile phone to be used as an in-the-field programming device click on the "Mobile Devices" module icon.



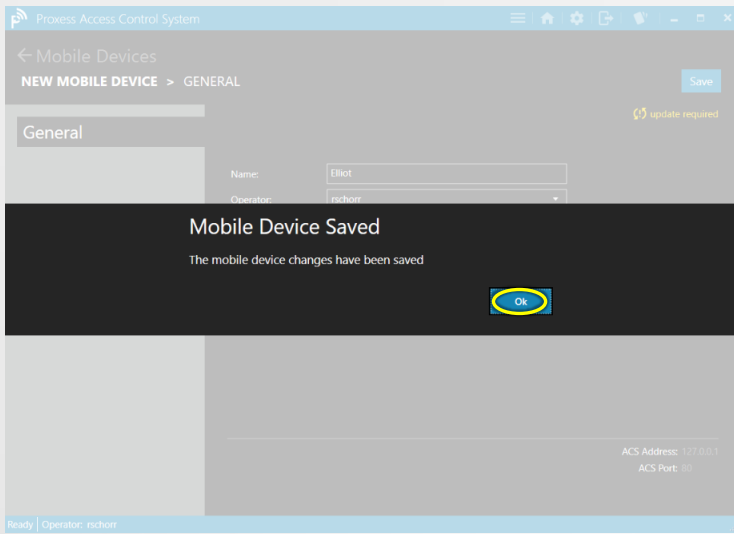
This is the list of all the registered mobile phone Apps in the system. Click "Add New Mobile Device" to do so. To return to the Home Screen \ Dashboard, click on either the Home icon on the top task bar, or the "Access" tab at the top left of the page.



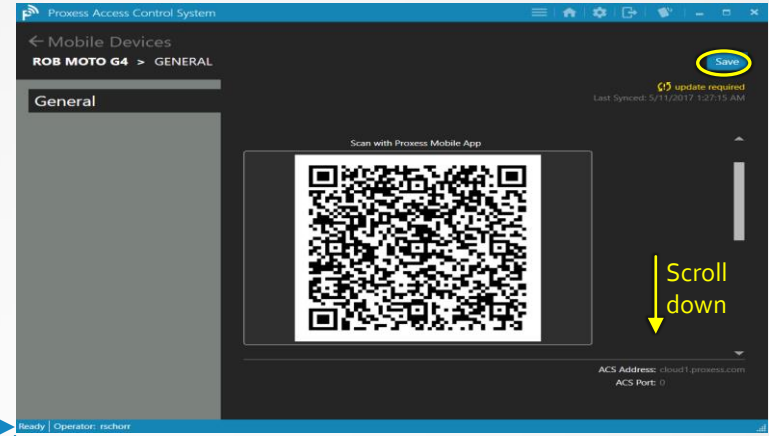
Enter a name for the mobile phone to be added. Select the responsible Operator for this App from the drop-down list.



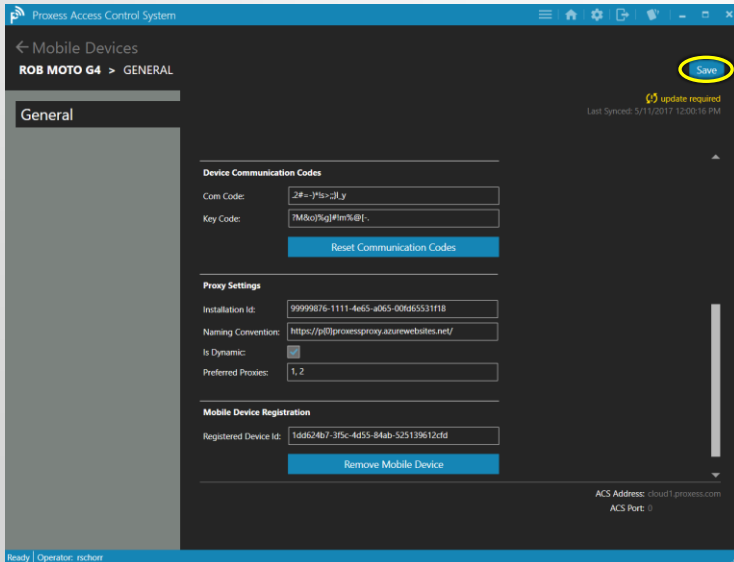
Check the Enabled box and click "Save".



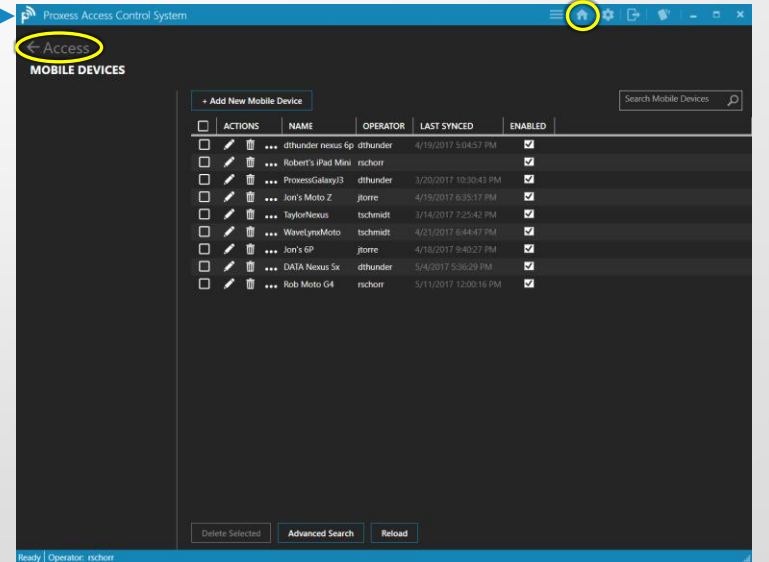
Click "OK".



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



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



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



# MOBILE PHONE APP

## Proxess Sync™ INITIALIZATION



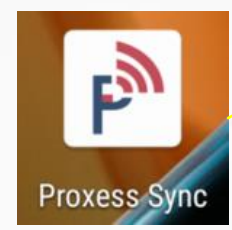
# Proxess Sync™ Initialization - 1

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

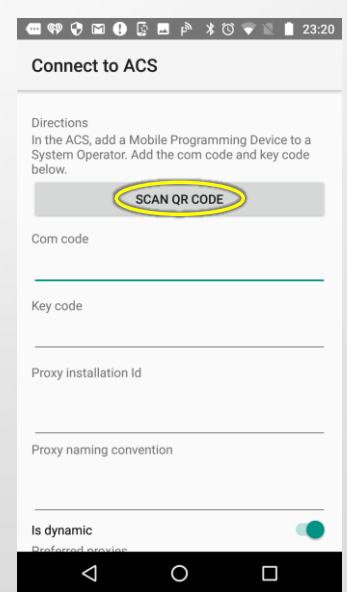
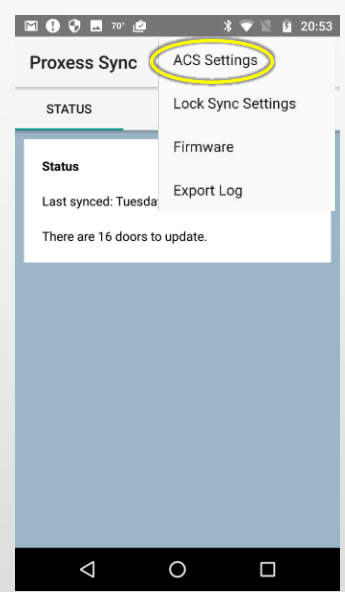
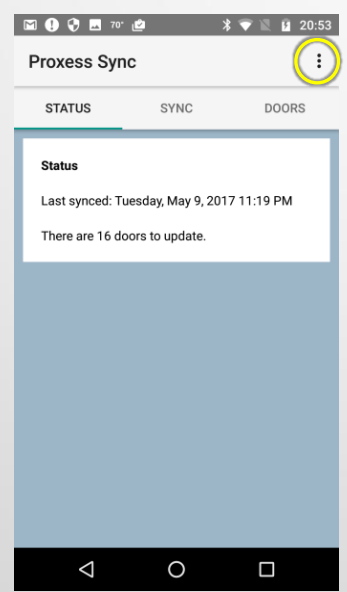


For ProxessIQ™ synchronization, ensure WiFi and/or Mobile Communication is turned on.

For lockset communication, assure Bluetooth is turned on.



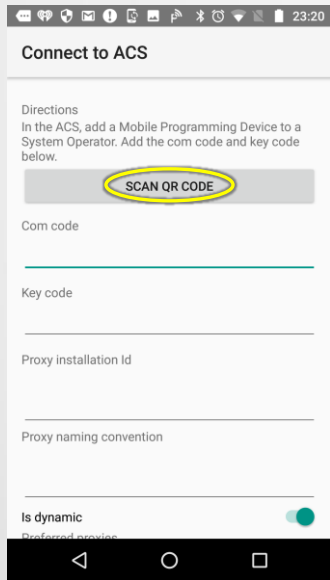
Click the Proxess icon to open the App.



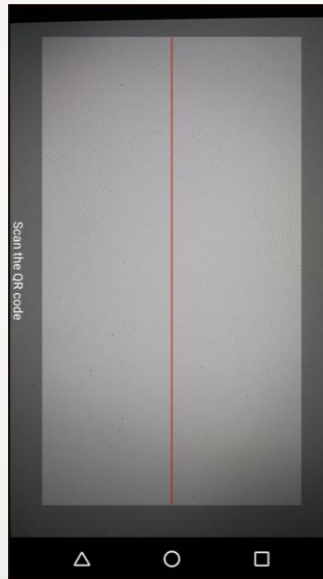
The screen on the left will appear the first time the App is opened. Future openings of the App will display the last screen viewed from the last time the App was closed. Click the icon circled. Then click "ACS Settings" from the menu. The screen on the right appears. To initiate the App, click on "Scan 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

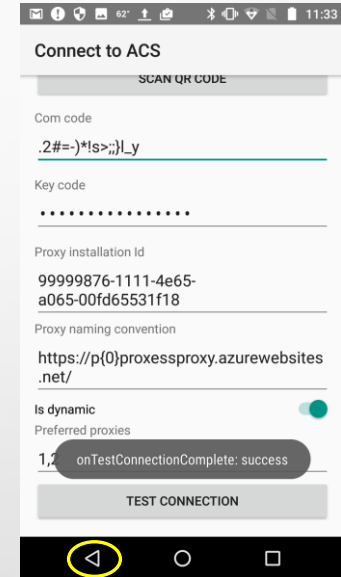
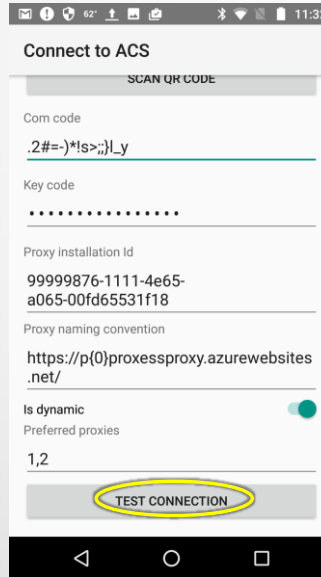


The screen on the left opens. Click the "SCAN QR CODE" button and the scanner screen in the center opens. This is a scanner, which uses your phone's camera to view the QR code that has appeared in the screen in the software where your new Mobile Device was added, shown in the image on the right.



**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.



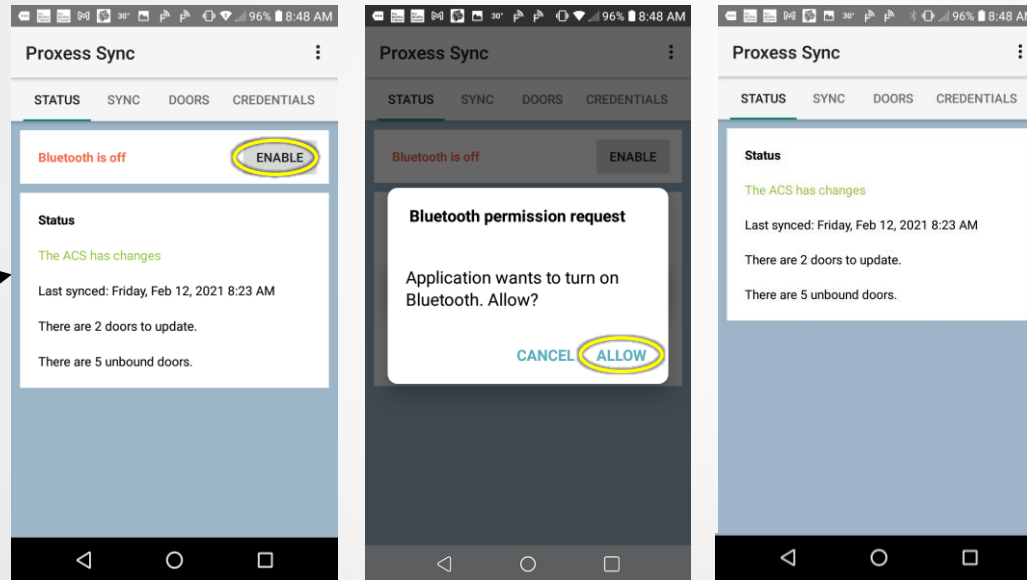
# MOBILE PHONE APP: UPDATING the LOCKSET

- 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.



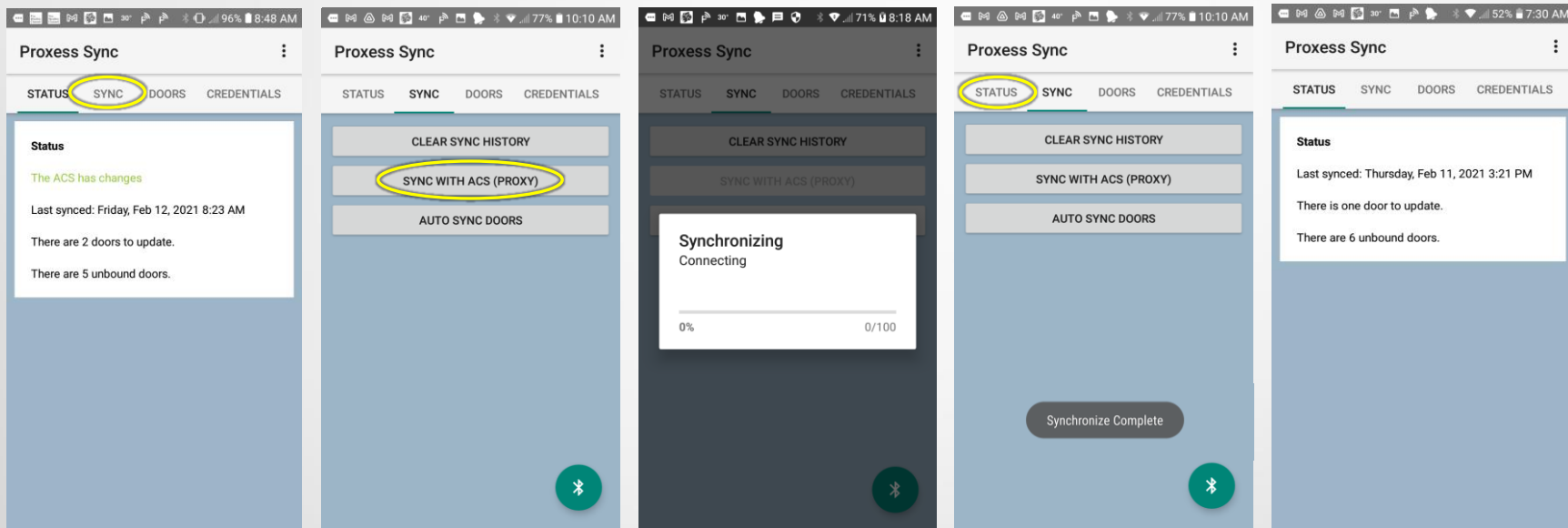
To use the Proxess Sync™ App to update locksets and gather their audit trail data to send to the ProxessIQ™ software, open the App and click on "Status" in the top menu. If Bluetooth on your phone is off, click "Enable" to turn it on or the phone will not be able to communicate with the locksets and 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.



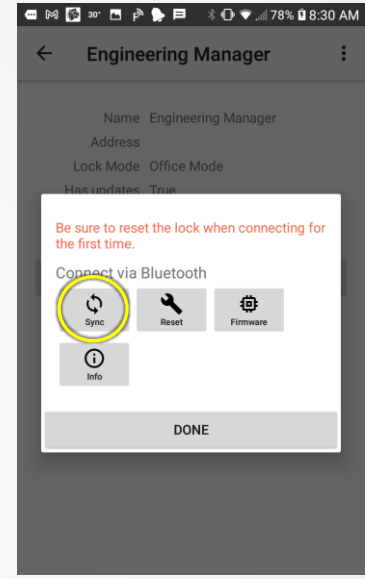
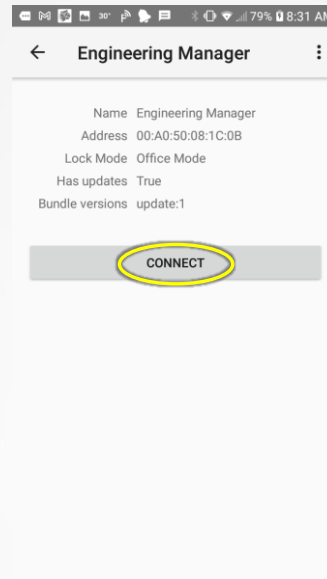
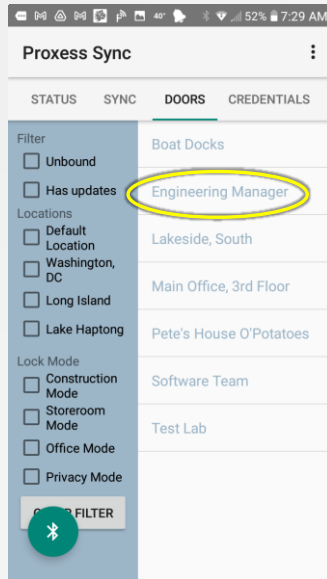
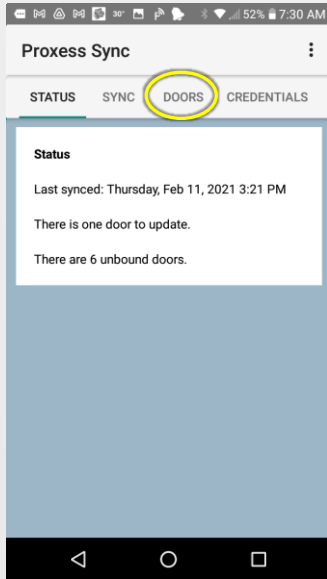


## Sync with the Access Control System

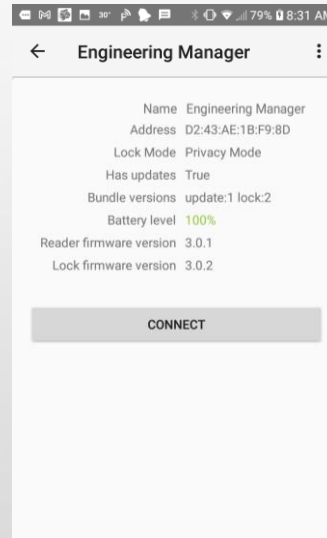
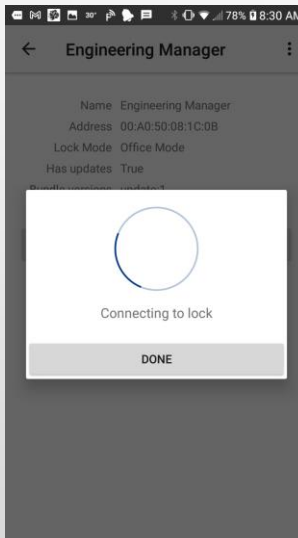
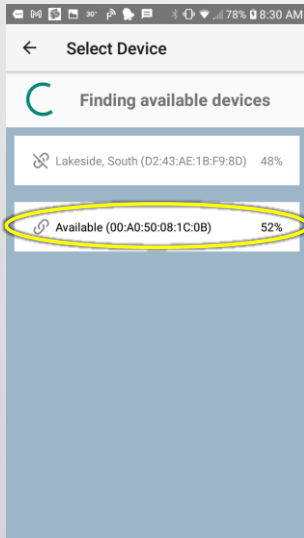


To perform any desired updates on the locksets, updates first need to be delivered to this phone. At this point, the phone does not need to be near any lockset. Click "Sync" from the top menu. The second screen above appears. Click "Sync with ACS" and the status bar will update you with progress and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

# Must Initialize a Lockset Prior to First Synchronization



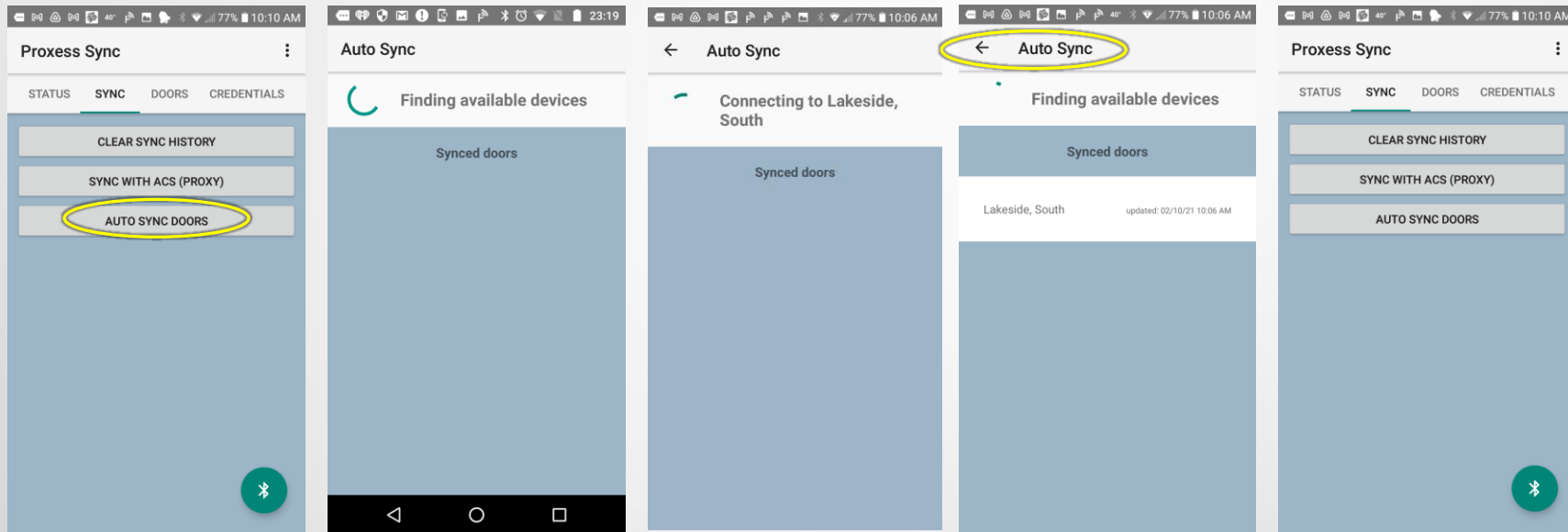
To initialize a lockset click on "Doors" from the top menu. To see the door you are looking for, check the box for the location your lockset resides in. That list of doors will appear. Click on the lockset name to be initialized and the menu for that door will appear. Click on "Connect" and then "Sync"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



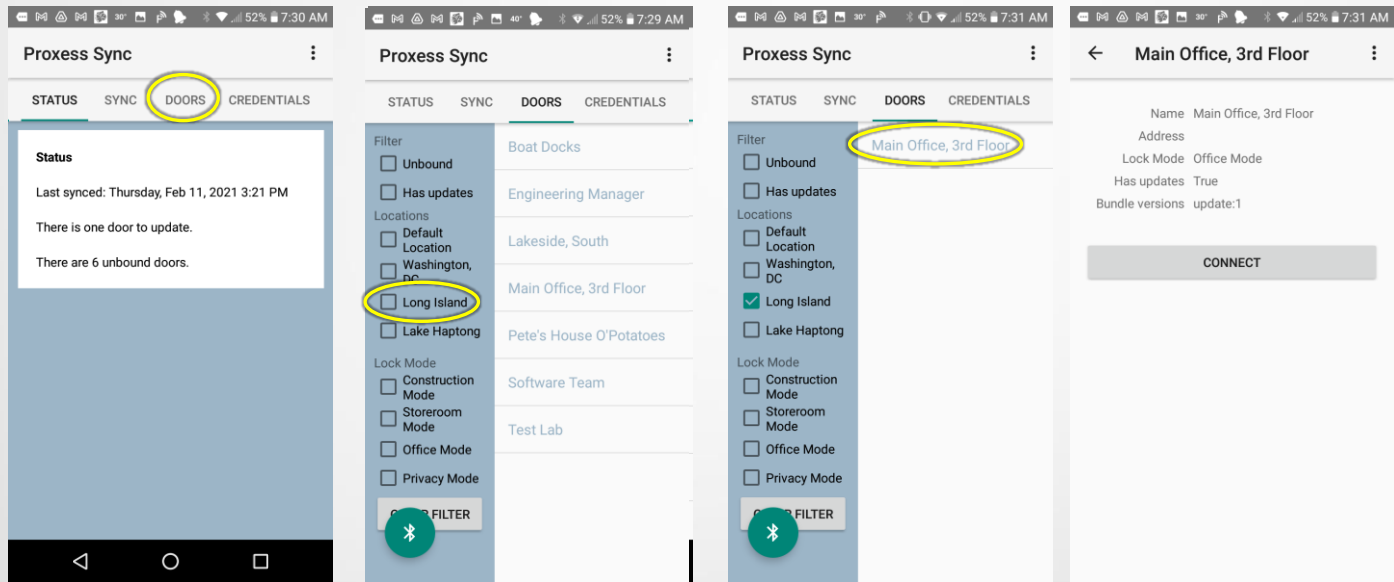
Once the ACS sync is complete and you are ready to update the locksets, click "Auto Sync Doors" and proceed to the first door to be updated. The 2<sup>nd</sup> (second) image will be shown as the App begins looking for locksets. The App will automatically begin the handshake, verification and update process when the 3<sup>rd</sup> image appears, usually within about 20 feet of a lock. However, it is highly recommended to remain close to a lock for it to sync quickly and completely, which is not just more reliable, but will also help to reduce the battery usage on the lock. The App will show when the update has completed. You may proceed to the next lockset(s) to be updated without the need to click on further buttons.

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

**NOTE:** During the update process, audits will be collected from the locksets and as long as there is connectivity to the ProxessIQ™ 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)

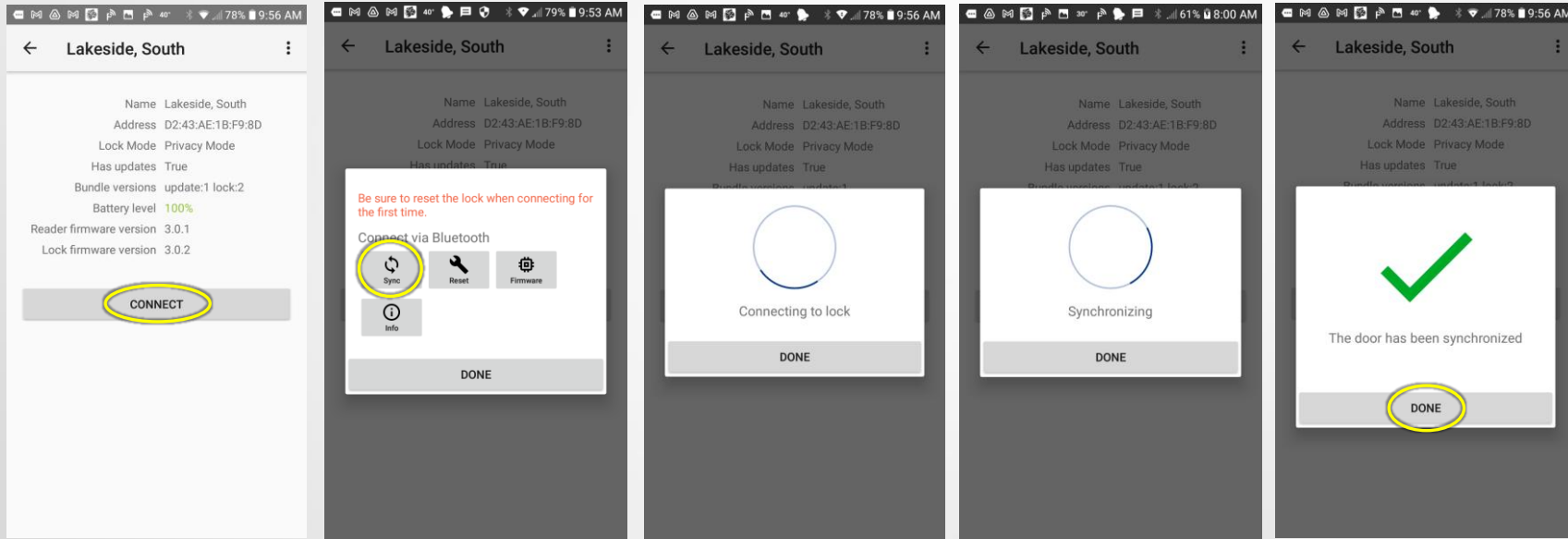


To manually perform any desired update on one specific lockset at a time, follow the instructions to "Sync with ACS" from the beginning of this section.

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.

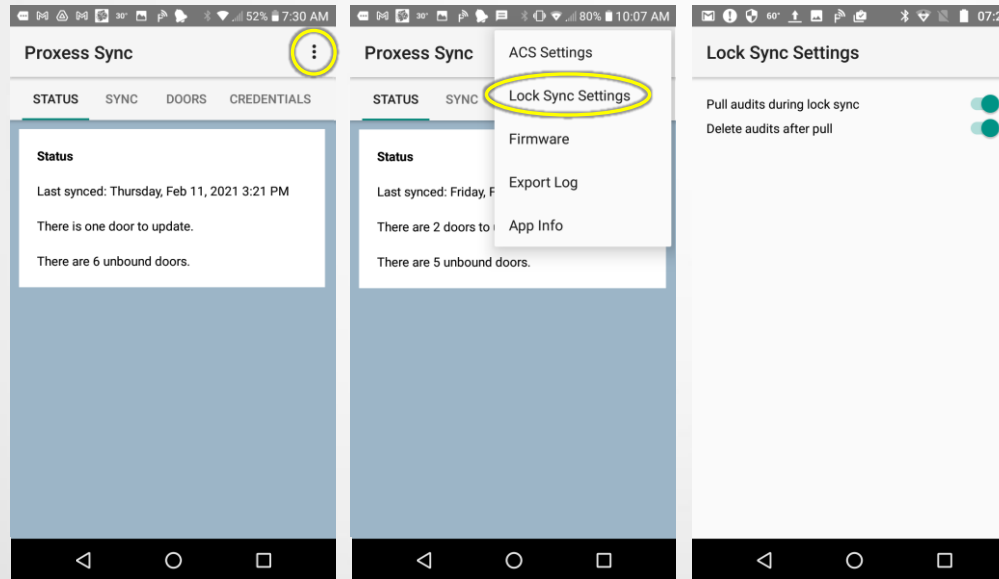


# MOBILE PHONE APP

## LOCKSET SETTINGS, FIRMWARE UPDATES & LOGS



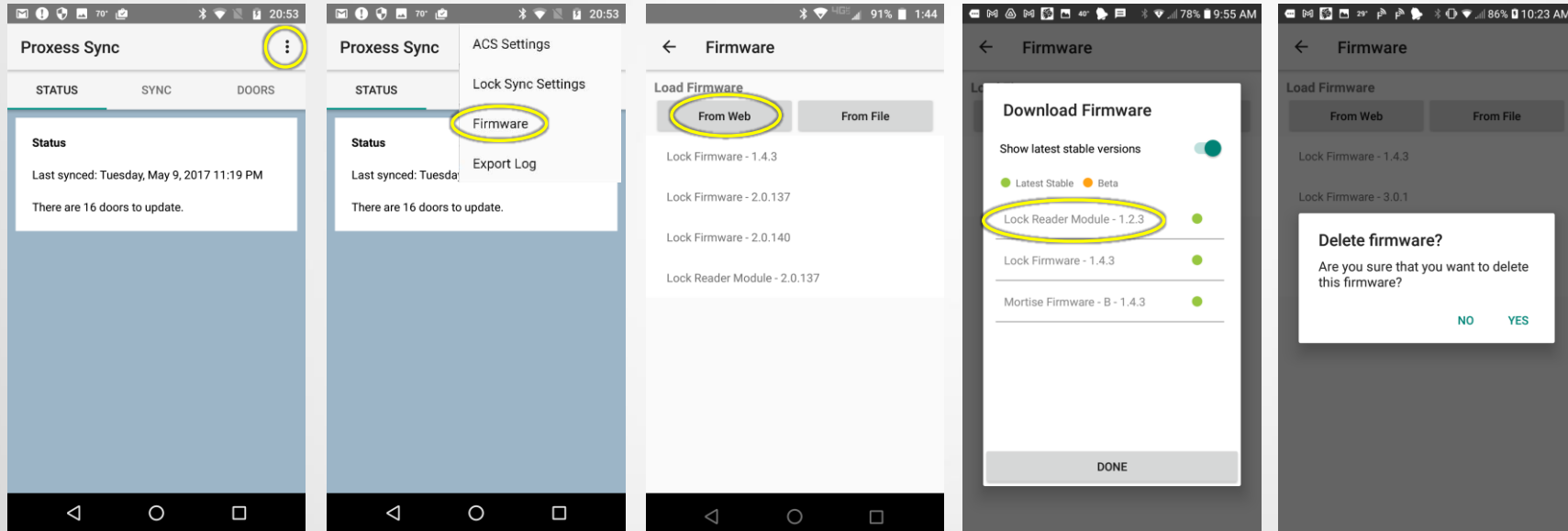
## Sync Settings



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.

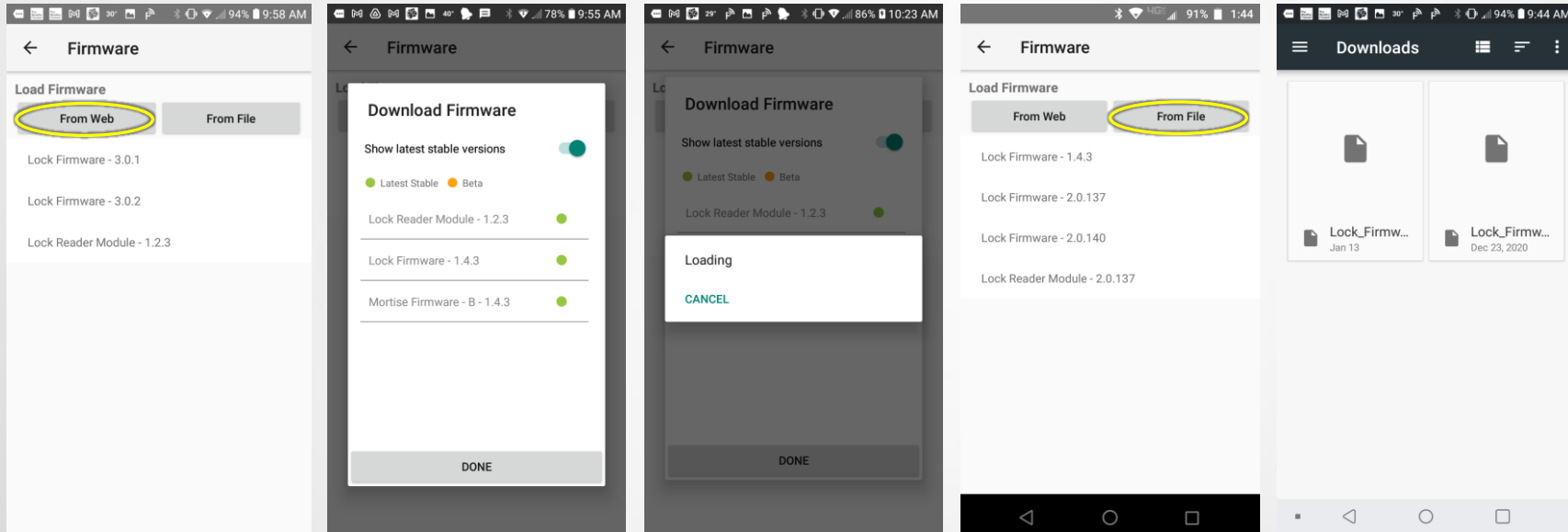
**Note: For the Cylindrical locksets, only download the Lock Firmware file. For the Mortise locksets, only download the Mortise Firmware file. The reader module firmware is the same for both Cylindrical and Mortise locksets.**

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

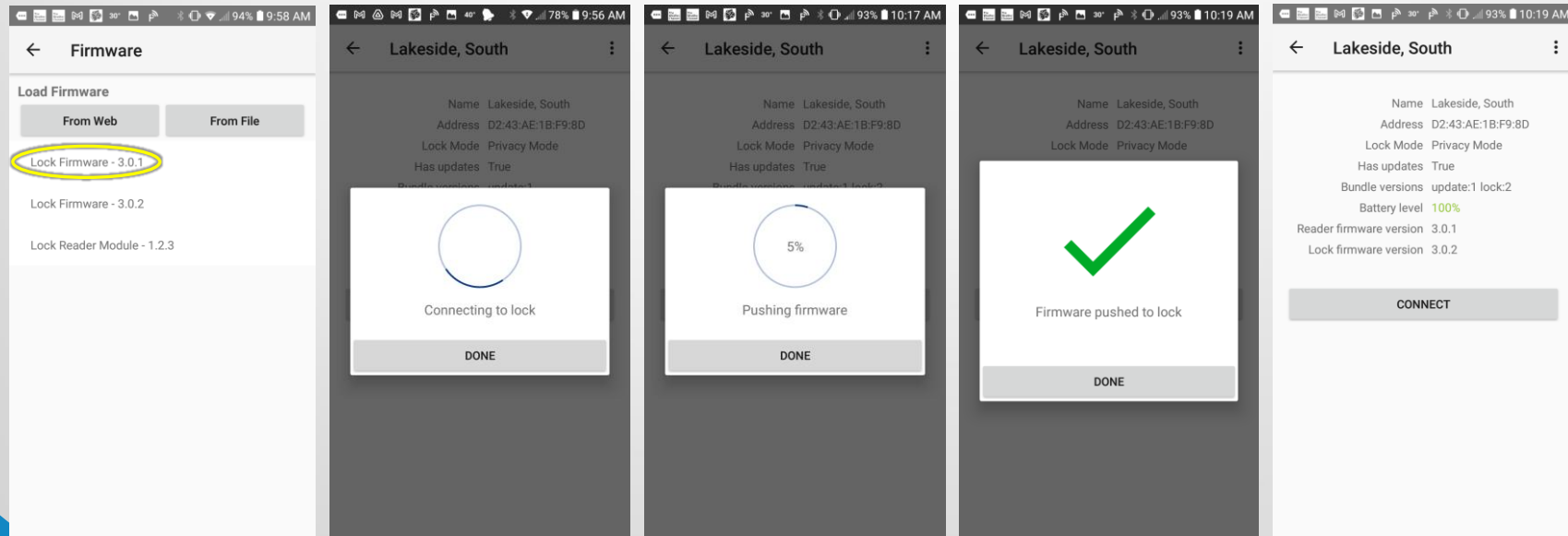
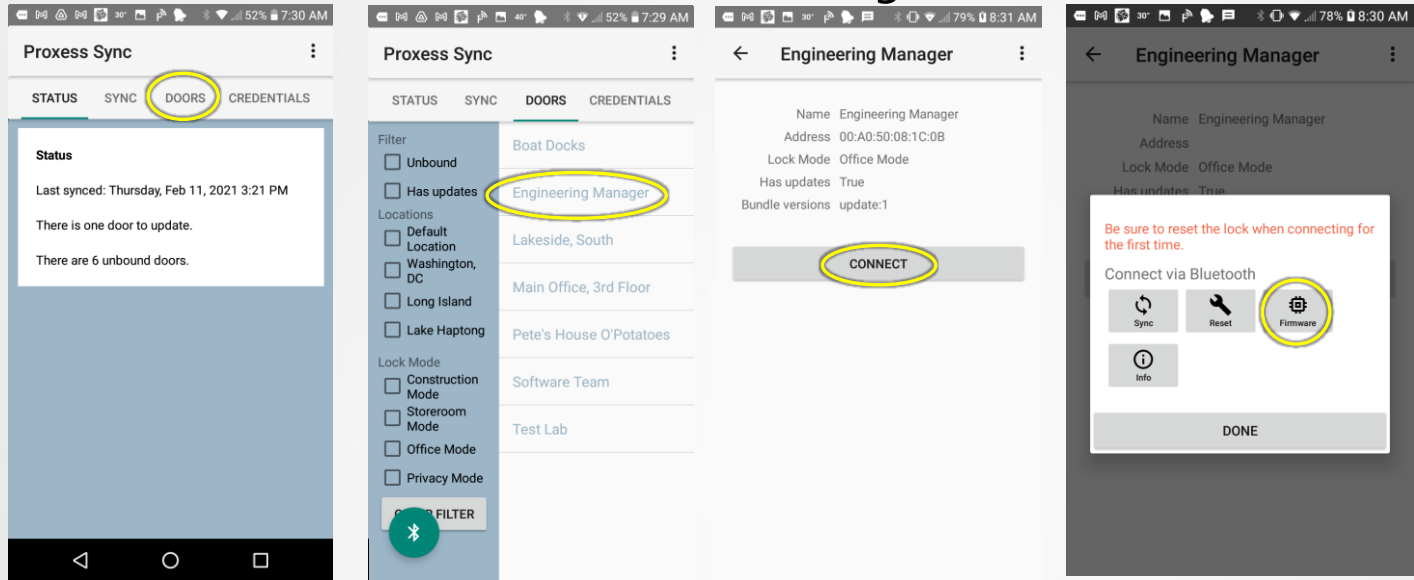


On the Settings-Firmware page, you may load firmware onto (the proper folder in) your device from either the Proxess website, or your device. To load firmware from the Proxess website, just tap “From Web” and the available firmware (that is Not already on your device) will be listed. If allowed, you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



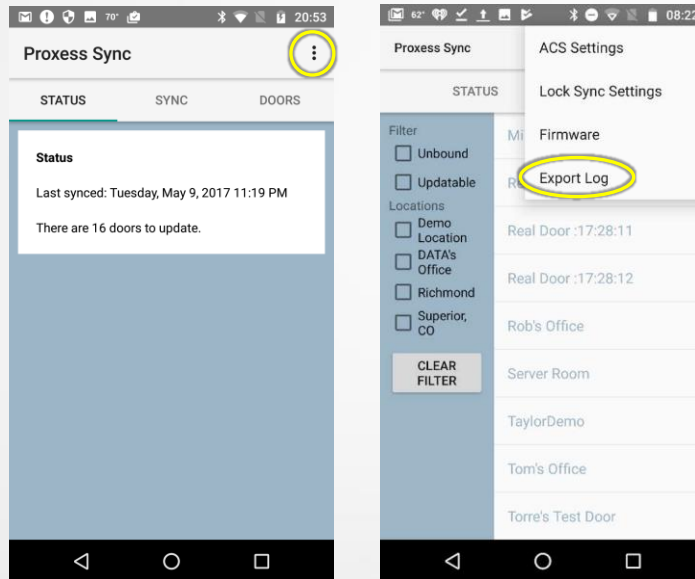
# Lockset Firmware Downloading (Execution)



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.

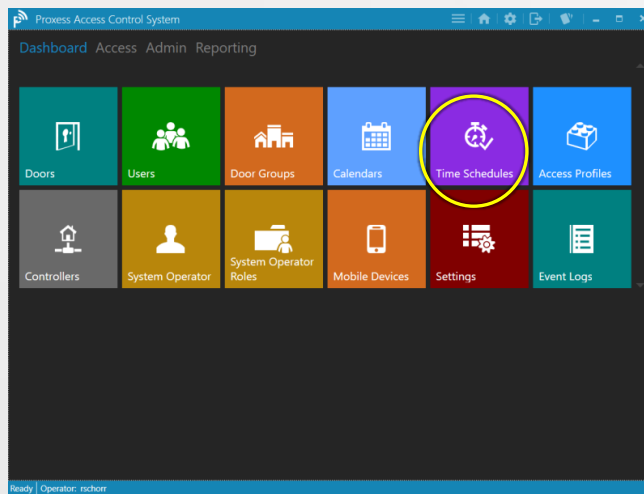
From the Home Screen of the App, click on the icon above and then click on "Export Log" from the resulting menu. Email the file that is downloaded into the phone's file directory.



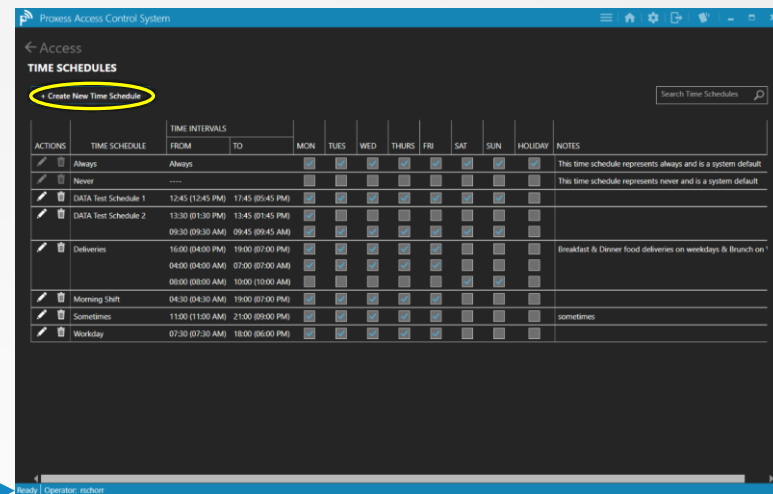
# TIME SCHEDULES



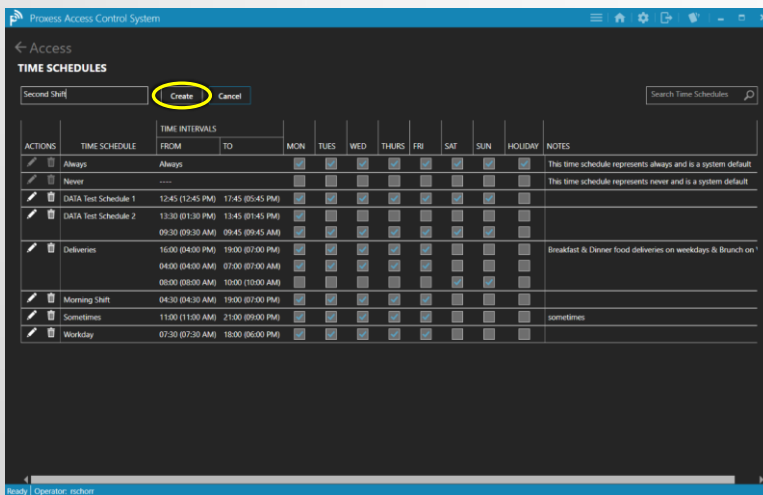
# Time Schedules - 1



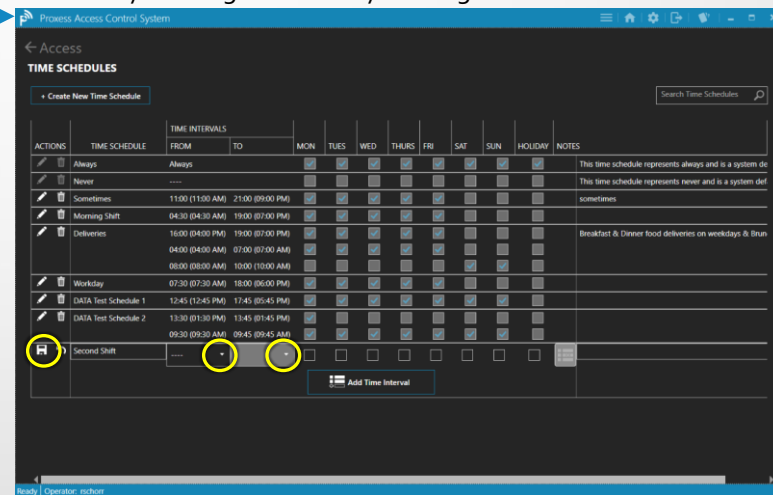
From the Home screen \ Dashboard, click "Time Schedules".



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.



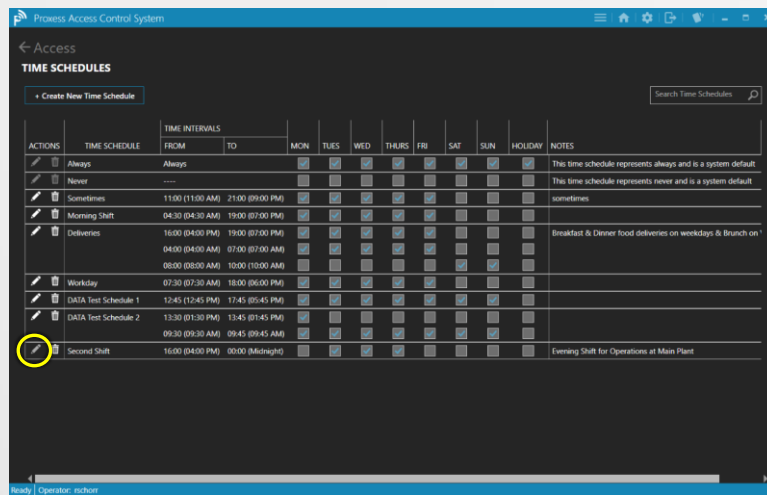
Type in a name for the new Time Schedule and click "Create".



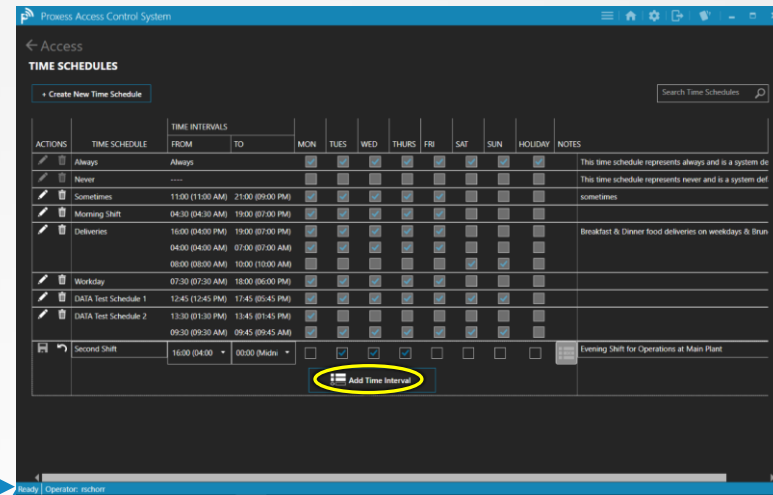
The new Time Schedule will appear at the bottom of the list. To select the overall time for it click the dropdown buttons for both the "From" and "To" columns. Select the days of the week in which this will be in effect and whether it will apply during Holidays. Optionally, add a note to describe the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



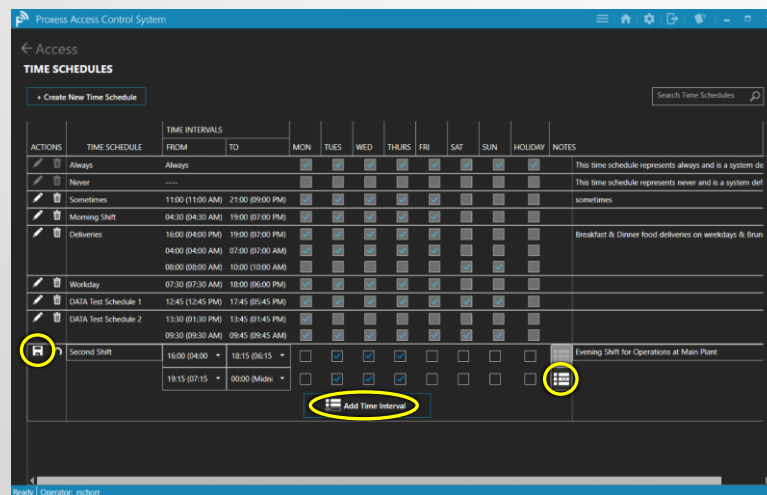
# Time Schedules - 2



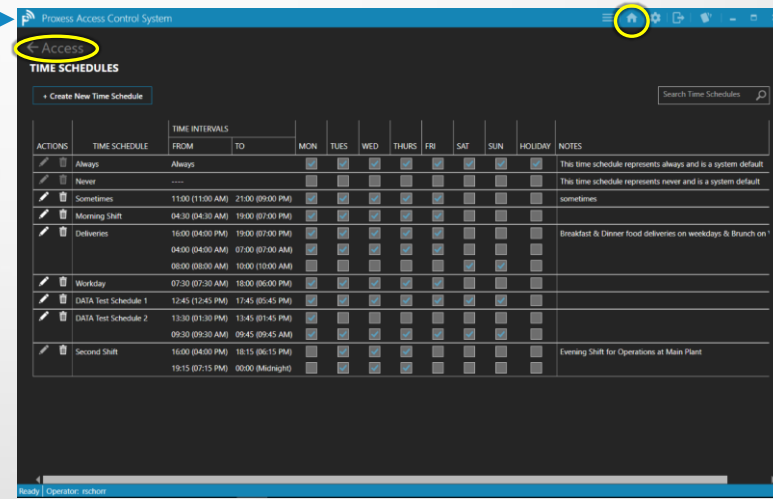
To make changes, or to add Time Intervals, click the Edit icon.



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.



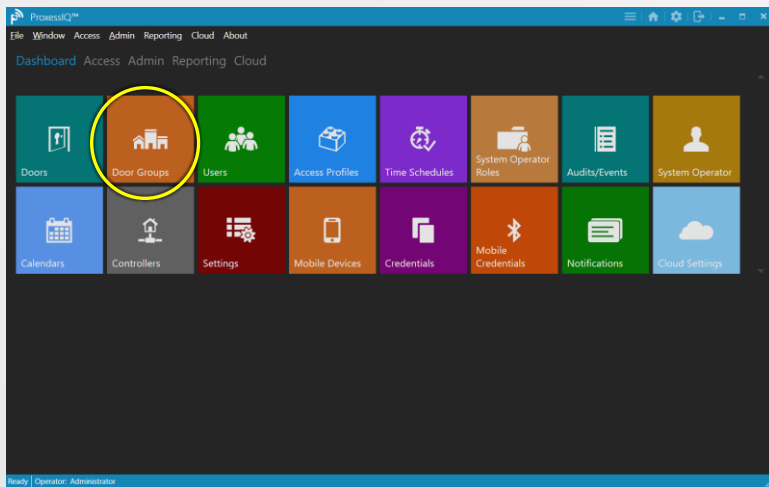
# DOOR GROUPS

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

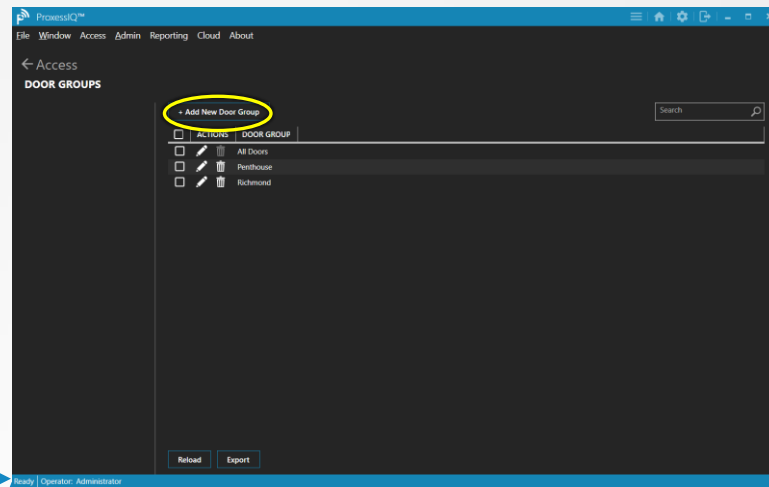
**[www.proxess.com/Proxess/media/Proxess/Documents/ProxessIQ-Manual-without-Hidden-Slides\\_3.pdf?ext=.pdf](http://www.proxess.com/Proxess/media/Proxess/Documents/ProxessIQ-Manual-without-Hidden-Slides_3.pdf?ext=.pdf)**



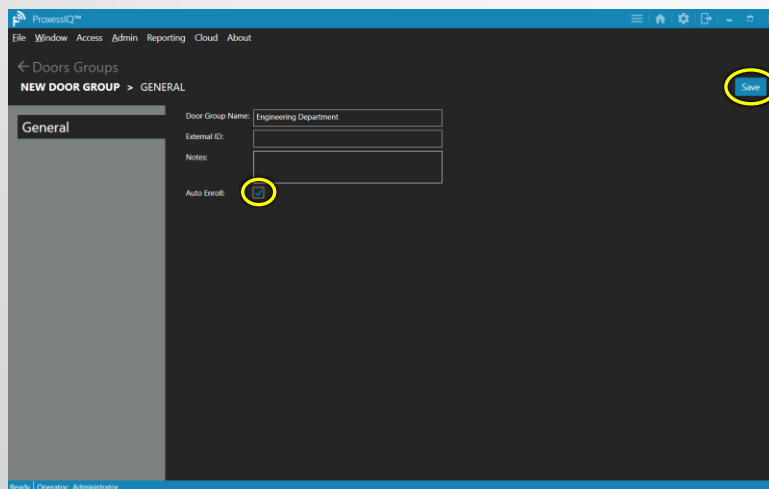
# Adding & Editing Door Groups - 1



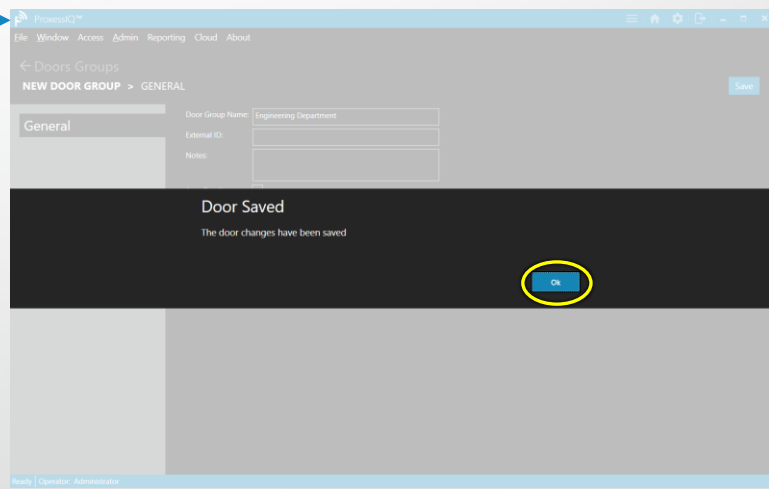
From the Home screen \ Dashboard, click "Door Groups". Before adding Door Groups, consider adding any custom Time Schedule and Access Profiles you desire.



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.

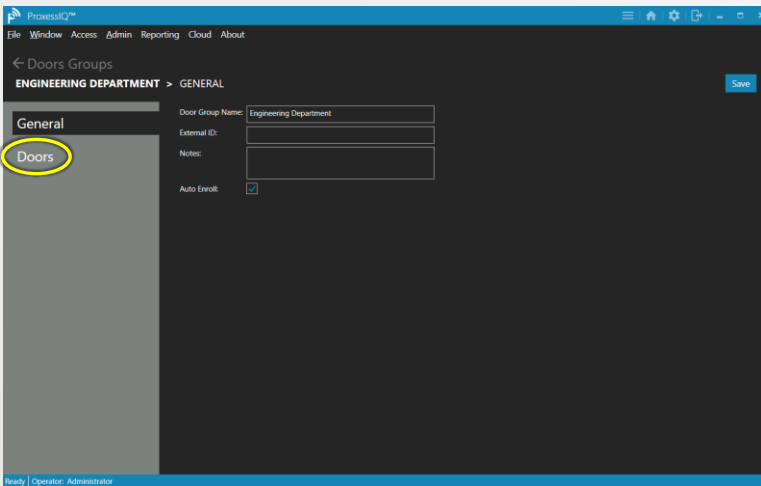


Click on "OK".

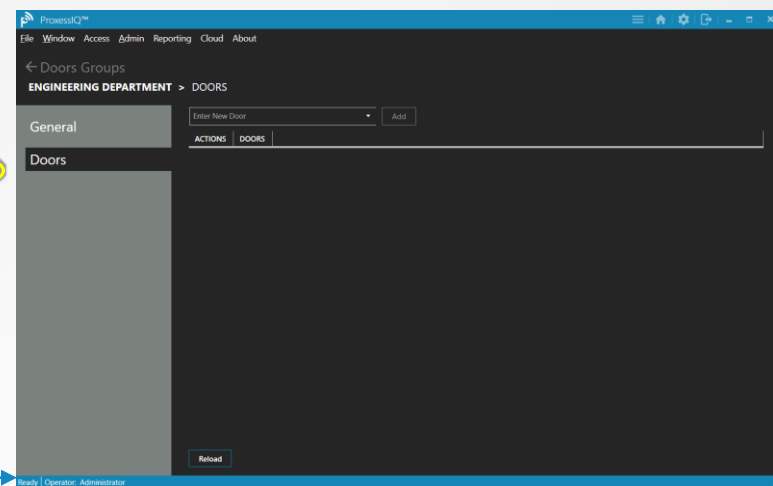




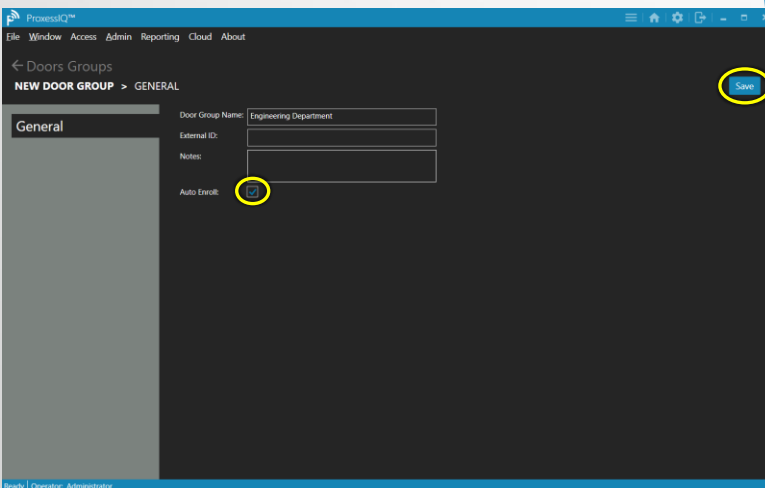
# Adding & Editing Door Groups - 2



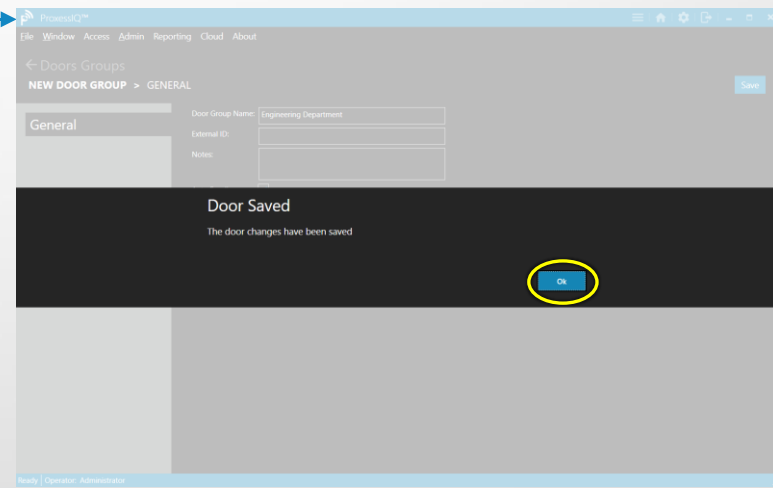
Click on the "Doors" tab to add the Doors that will become a part of this new group.



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.



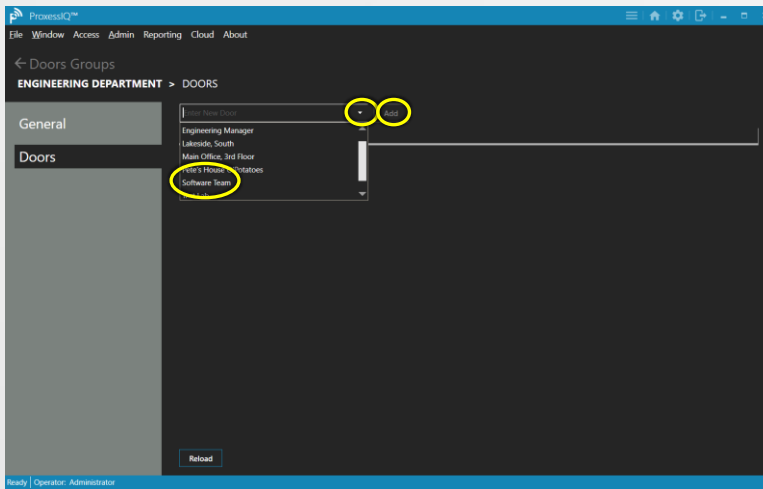
Enter the name for the new Door Group. "External ID" and "Notes" are not mandatory and are just for the administrator's reference. Checking the "Auto Enroll" box will cause all future doors that are added into the software to be enrolled into this Door Group. Click "Save" to do so.



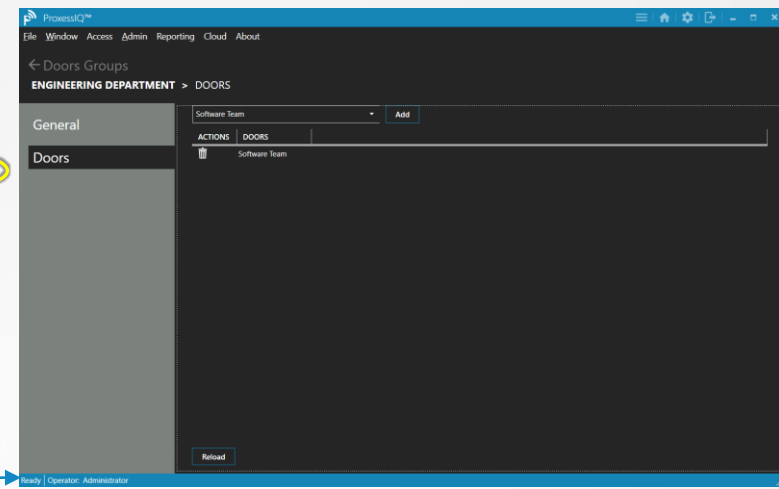
Click on "OK".



## 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.



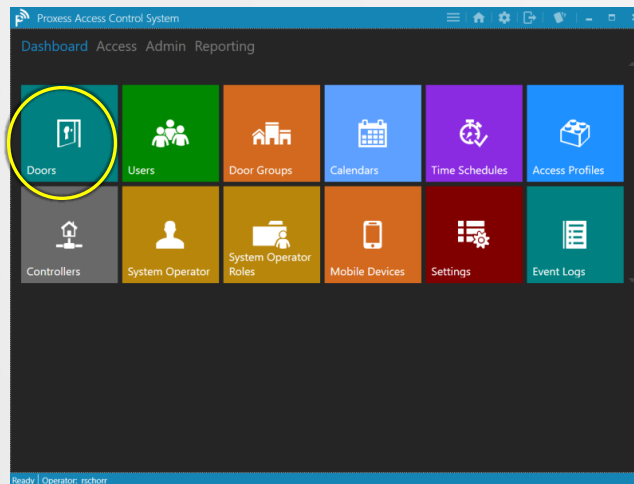
# DOORS & DOOR GROUPS

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

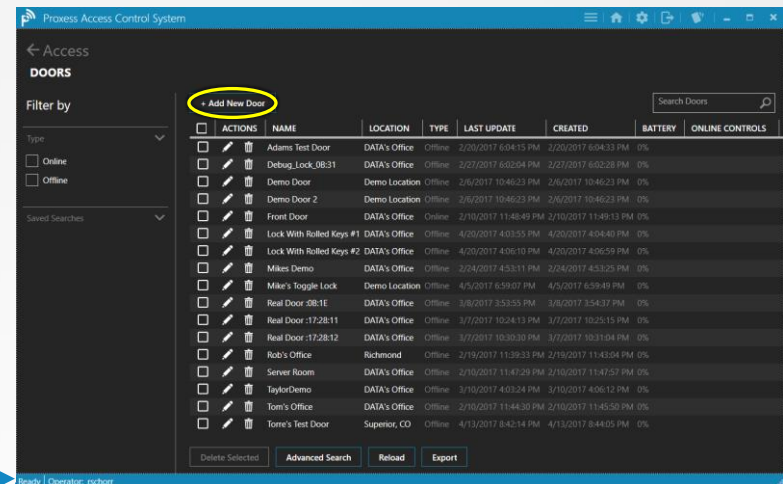
**[www.proxess.com/Proxess/media/Proxess/Documents/ProxessIQ-Manual-without-Hidden-Slides\\_3.pdf?ext=.pdf](http://www.proxess.com/Proxess/media/Proxess/Documents/ProxessIQ-Manual-without-Hidden-Slides_3.pdf?ext=.pdf)**



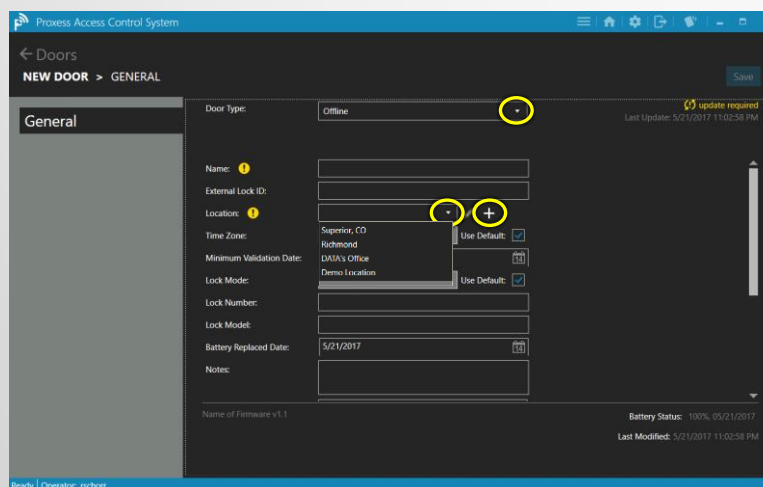
# Adding & Editing Doors - 1



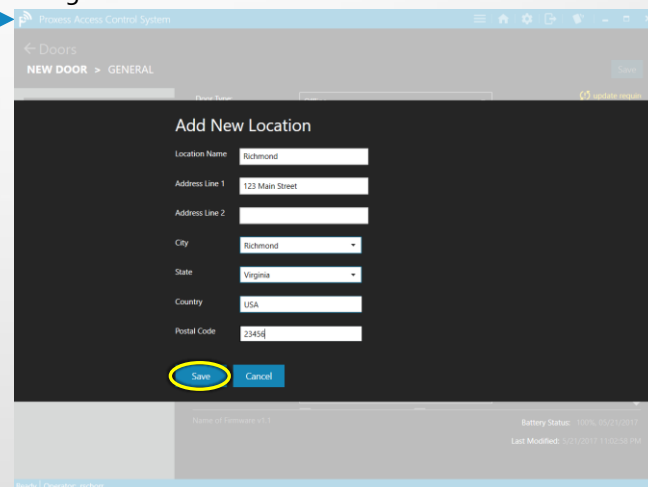
From the Home screen \ Dashboard, click "Doors". Before adding Doors, consider adding any custom Time Schedule and Access Profiles you desire.



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.



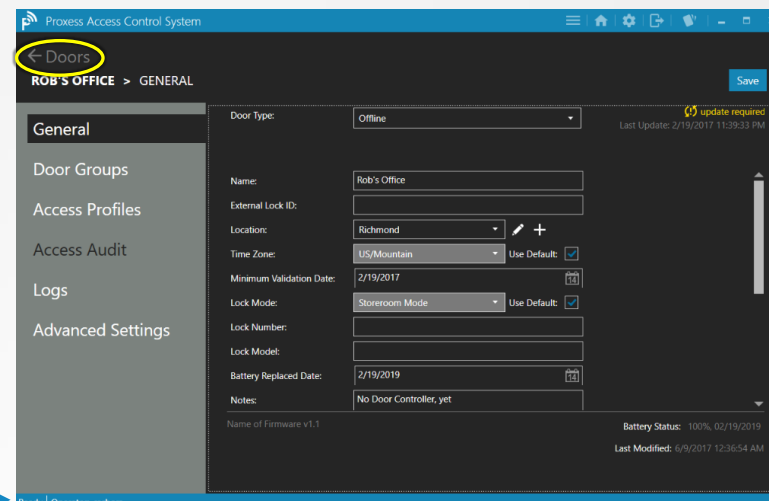
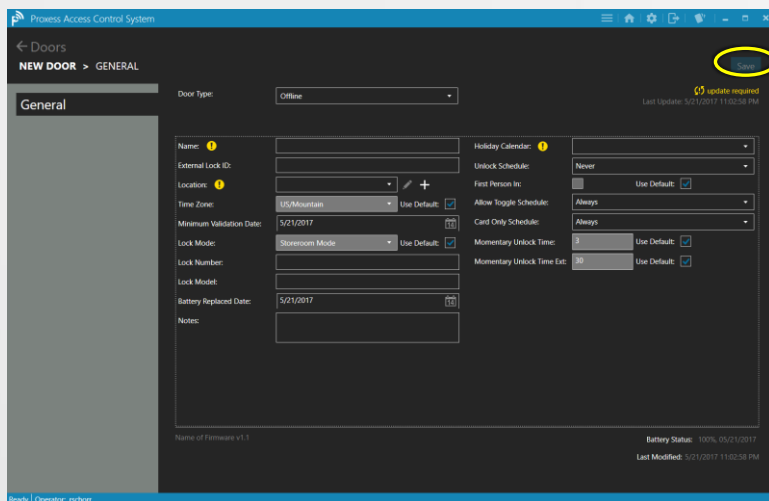
Select if the door will be online or offline. This selection will let the software know how to attempt to connect with this door for updates and on-demand commands. If you select "Online" you will need to add a Controller in a later section to connect it with. Type in a name for the new Door and select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



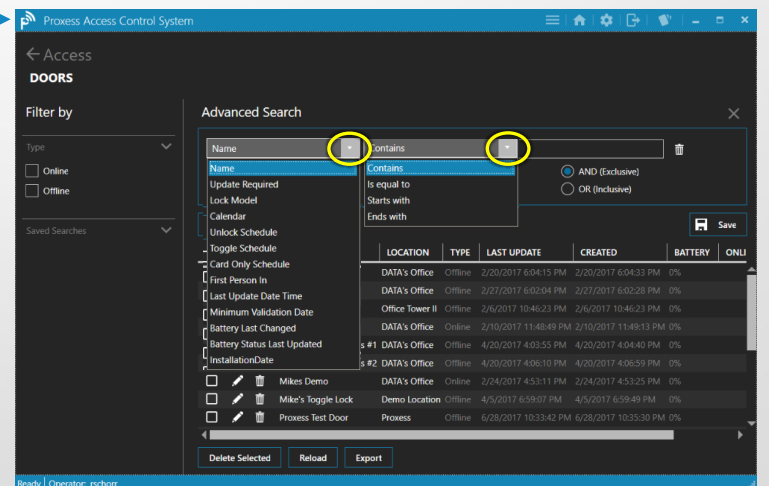
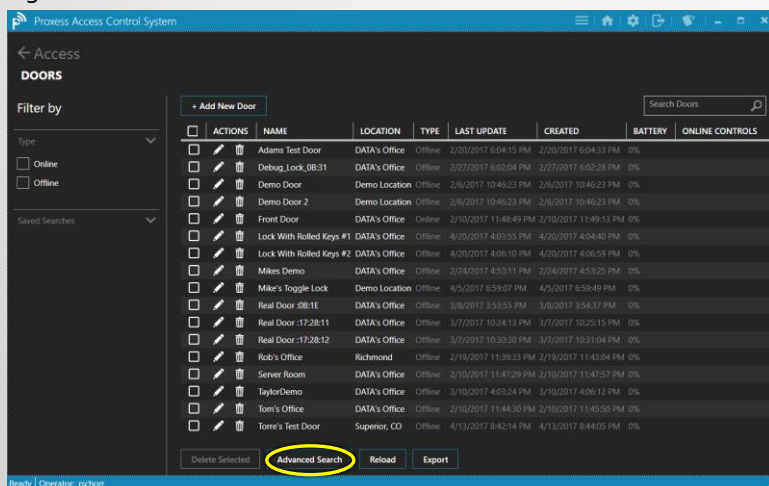
The "Add New Location" screen appears. Enter a "Name", and any other information you desire. Click the "Save" button to complete the action.



# 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.



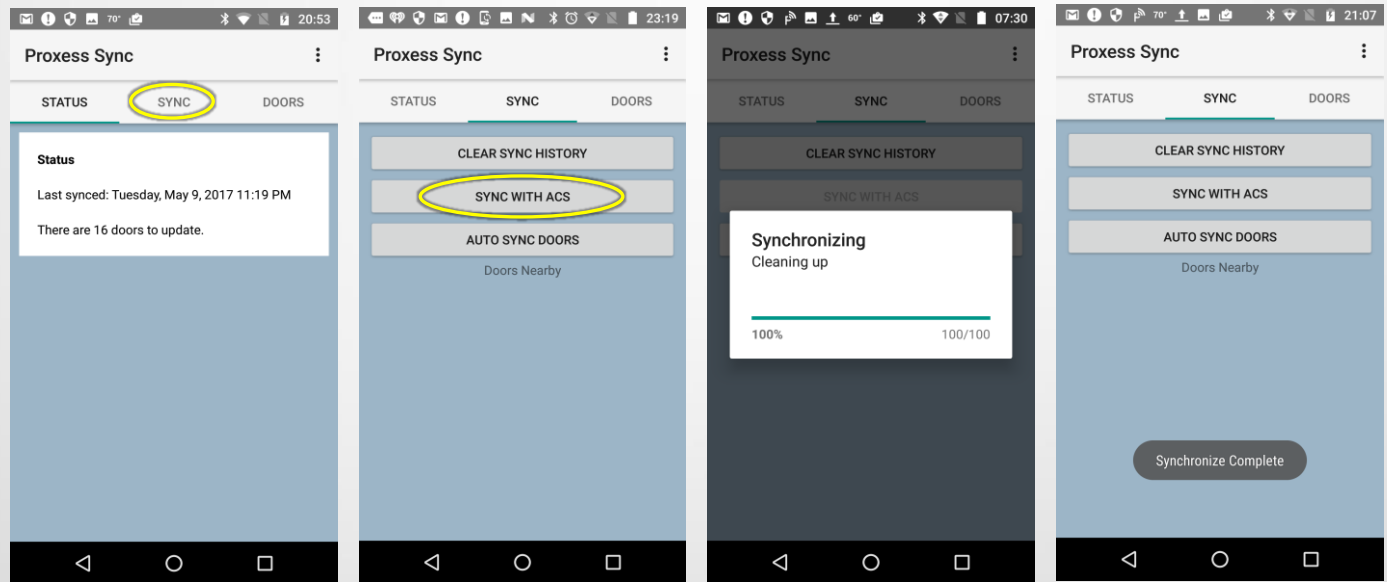
Click "Advanced Search".

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.



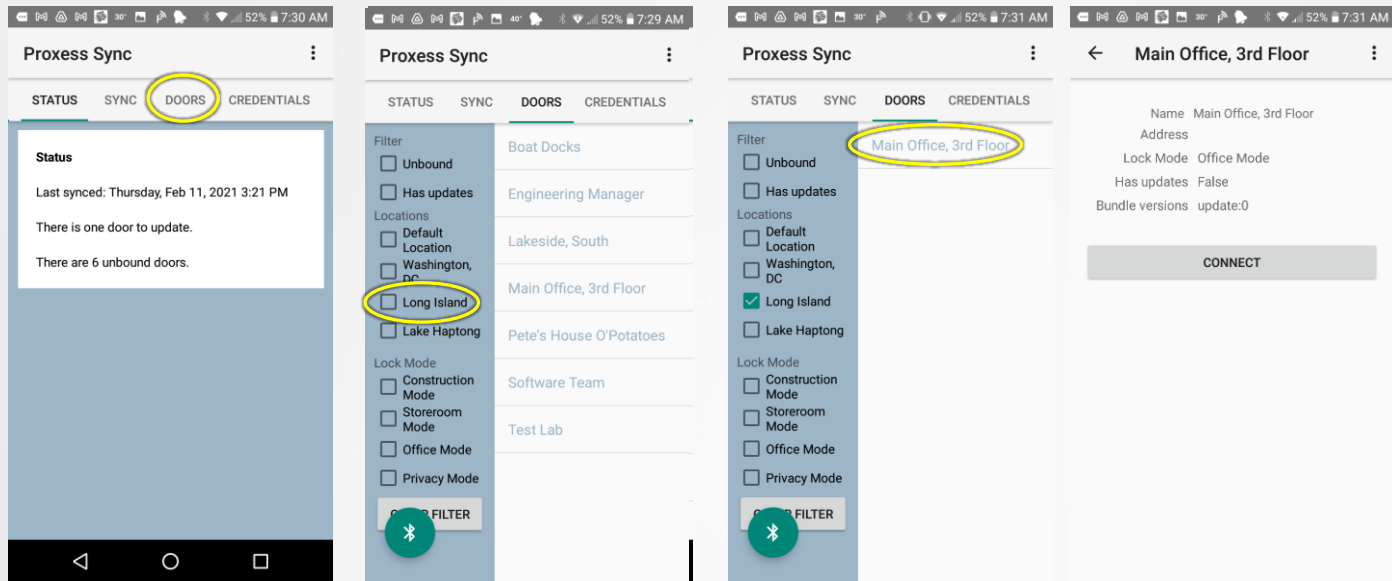
## Initialize a Lockset (1 of 2)

**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.**

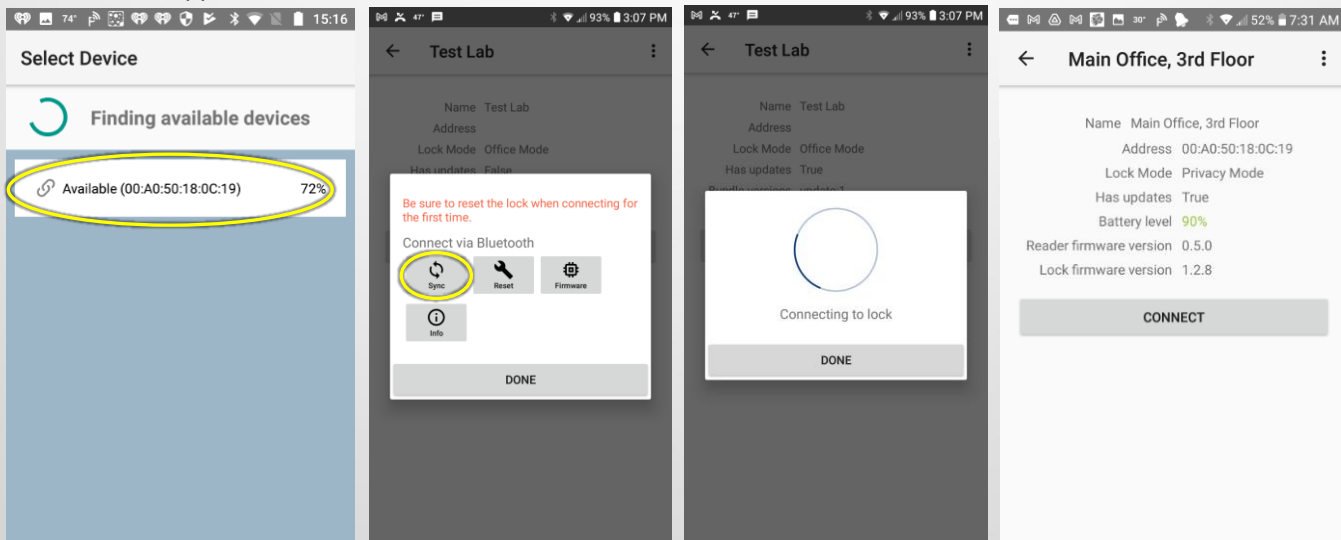


To perform any desired updates on the locksets, updates first need to be delivered to this phone. At this point, the phone does not need to be near any lockset. Open the Proxess Sync™ mobile App and click "Sync" from the top menu. The second screen above appears. Click "Sync with ACS" and the status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

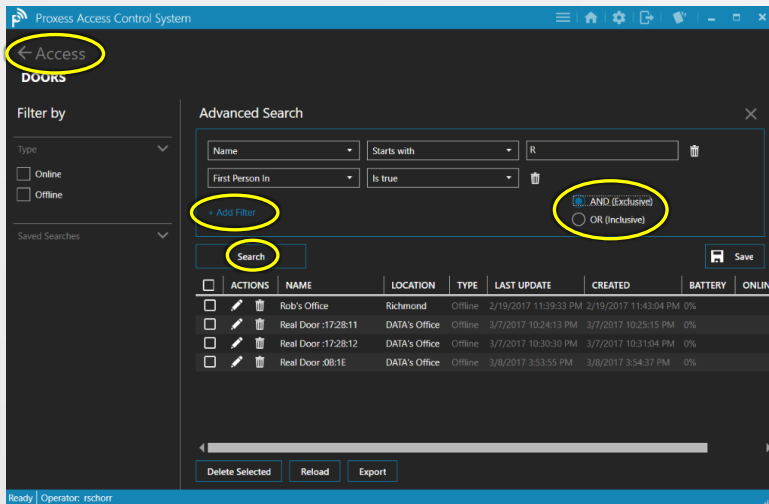


If the select device screen appears, click on the device with the greatest signal strength. Click the "Sync" button and once initialized, the battery level and firmware version for the lock's boards will display. The initialization is complete and you may return to other screens in the App or simply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

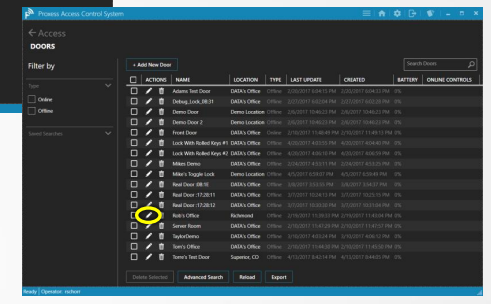
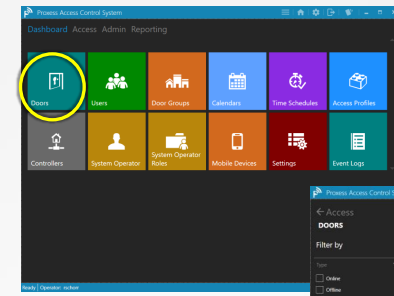




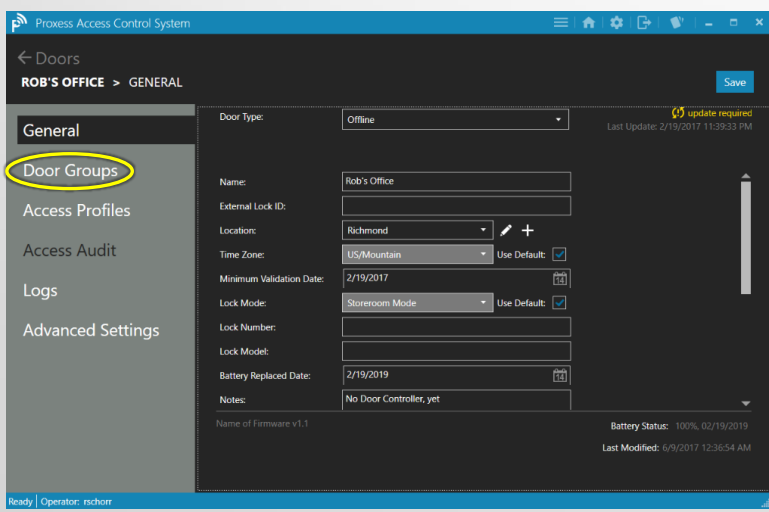
Adding & Editing Doors - 5



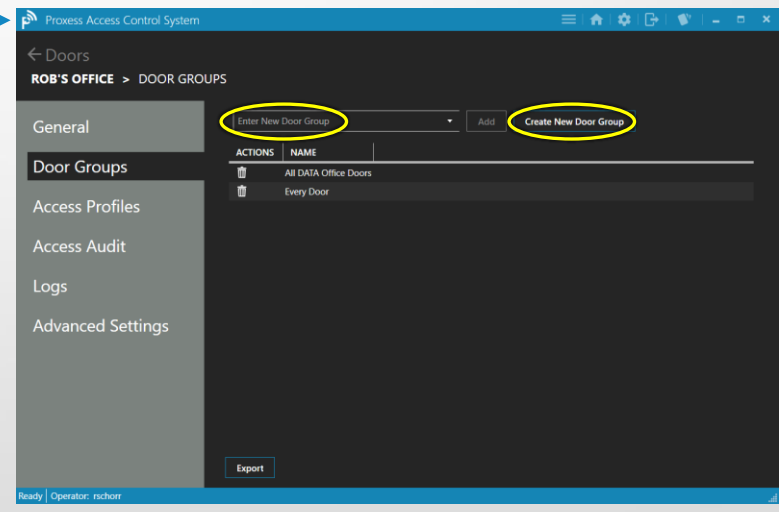
To the first search filter/criteria you have just entered, additional filters can be applied by clicking "Add Filter" and then selecting whether they are to be searched with all conditions needing to be met ("AND") or just one of the conditions needing to be met ("OR"). When all your desired filters 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.

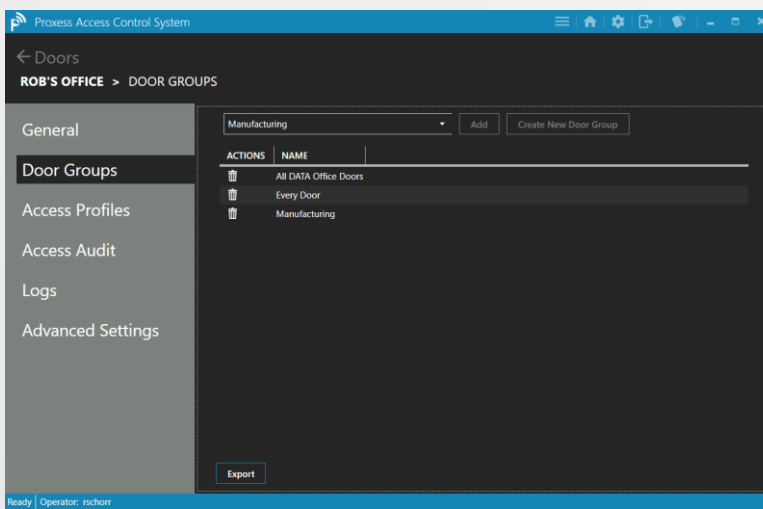


To add a new Door Group, type the name you want in the "Enter New Door Group" field and then click the "Create New Door Group" icon.

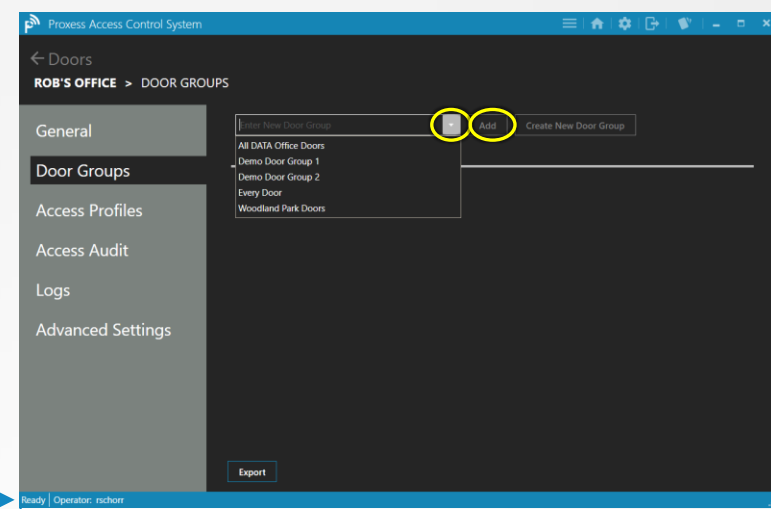




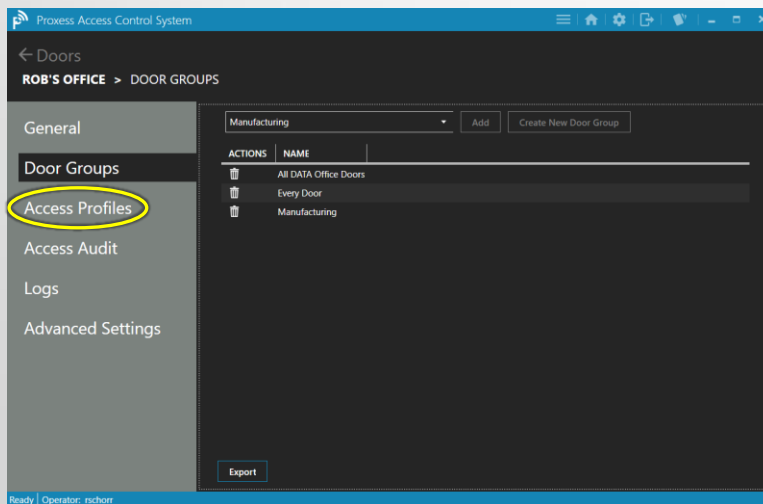
# Adding & Editing Doors - 6



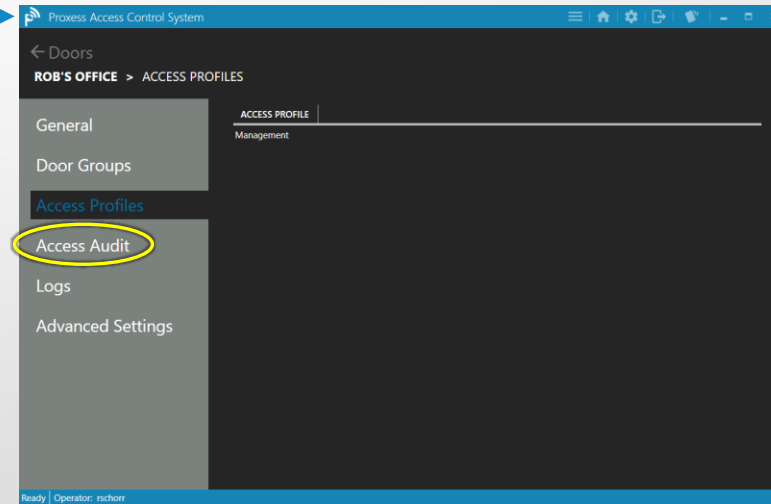
The new Door Group you have created will appear in the list for that Door and will become available to all other Doors in the system.



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".





ACTIONS	EVENT DATE TIME(UTC)	EVENT DATE TIME(LOCAL)	EVENT CODE	SOURCE
	7/16/2017 9:40:00 PM	7/16/2017 5:40:00 PM	DOOR_UPDATE	rschorr
	7/16/2017 9:30:44 PM	7/16/2017 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	(Gerac...
	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	(Gerac...
	6/20/2017 3:20:28 PM	6/20/2017 11:20:28 AM	ACCESS	(Gerac...
	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	(Gerac...
	6/20/2017 3:16:56 PM	6/20/2017 11:16:56 AM	ACCESS	Schorr, R
	6/20/2017 3:16:52 PM	6/20/2017 11:16:52 AM	ACCESS	(Gerac...
	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	(Gerac...
	6/20/2017 3:16:33 PM	6/20/2017 11:16:33 AM	ACCESS	Schorr, R

Click on the "Advanced Settings" tab.

**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:

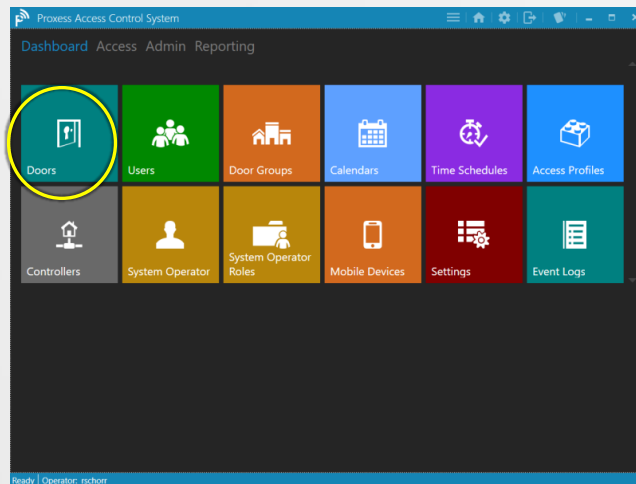
**Reset**

Reset Door Roll Bundle Key Roll Bluetooth Key

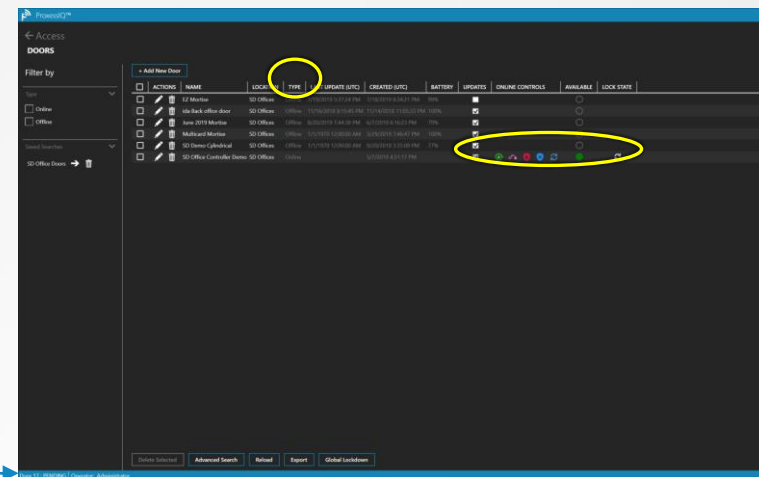
Everything in the "Advanced Settings" tab is initialized in a default mode with all the "Defaults" being edited in the "Settings" module. To change any setting, first un-check its "Use Default" box. A lockset is able to be set to Fail in a Secure, Unsecure/Safe or As-is mode. To return to the Home Screen \ Dashboard, click the "Doors" tab on the top left and then click "Access", or click the Home icon on the top right taskbar. (Jeff – We need a bit more room to explain the Lockdown options on this page, but they seem easy to understand, so I'm leaving it out of this document.)



# Controlling Online Doors - 9



We will now review the real-time/online door controls. From the Home screen \ Dashboard, click "Doors".



This is the User Interface for online doors and circled (on the right) are the available door controls. You can sort so that Online doors appear at the top of the list of doors by clicking on "Type", circled at the top of the screen.

UPDATED (UTC)	BATTERY	UPDATES	ONLINE CONTROLS	AVAILABLE	LOCK STATE
2019 8:34:21 PM	99%	<input type="checkbox"/>		<input type="radio"/>	
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"/>	
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"/>	
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.



INSTALLED (UTC)	BATTERY	UPDATES	ONLINE CONTROLS	AVAILABLE	LOCK STATE
2019 8:34:21 PM	99%	<input type="checkbox"/>		<input type="radio"/>	
1/2/2018 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.

INSTALLED (UTC)	BATTERY	UPDATES	ONLINE CONTROLS	AVAILABLE	LOCK STATE
7/18/2019 8:34:21 PM	99%	<input type="checkbox"/>		<input type="radio"/>	
1/14/2018 11:05:33 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
3/7/2019 6:16:23 PM	100%	<input checked="" type="checkbox"/>		<input checked="" type="radio"/>	
1/29/2019 7:46:47 PM	100%	<input checked="" type="checkbox"/>		<input type="radio"/>	
1/20/2018 3:35:09 PM	77%	<input checked="" type="checkbox"/>		<input type="radio"/>	
7/7/2019 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"/>	
1/2/2018 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"/>	
1/2/2018 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

INSTALLED (UTC)	BATTERY	UPDATES	ONLINE CONTROLS	AVAILABLE	LOCK STATE
2019 8:34:21 PM	99%	<input type="checkbox"/>		<input type="radio"/>	
1/2/2018 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"/>	

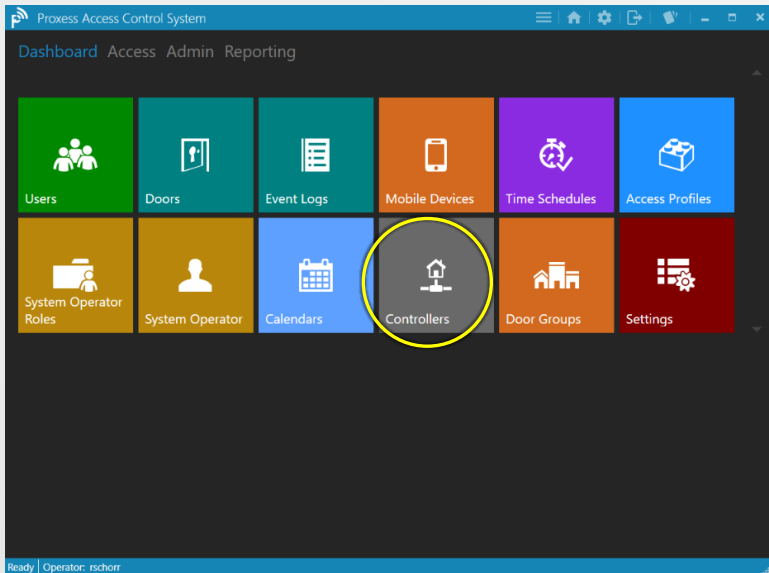
This icon shows that the lock has been and is locked.



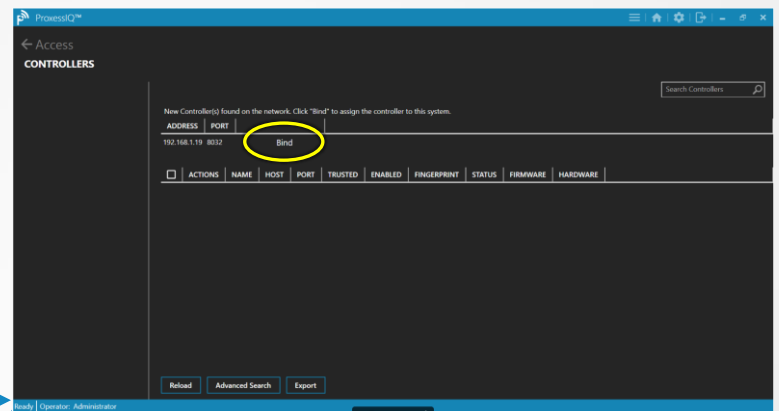
# CONTROLLERS



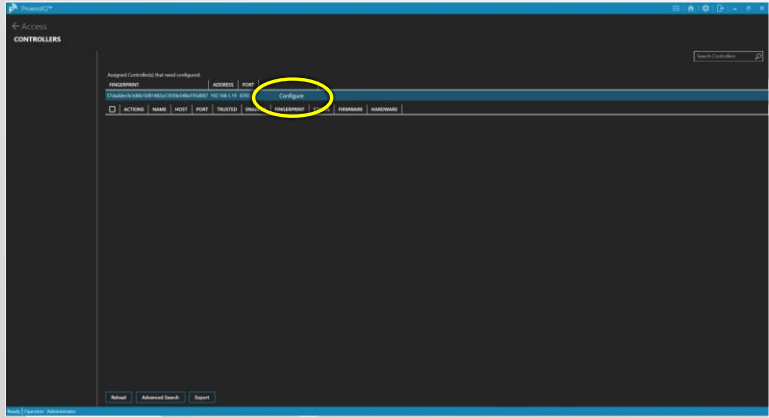
# Adding & Editing Controllers - 1



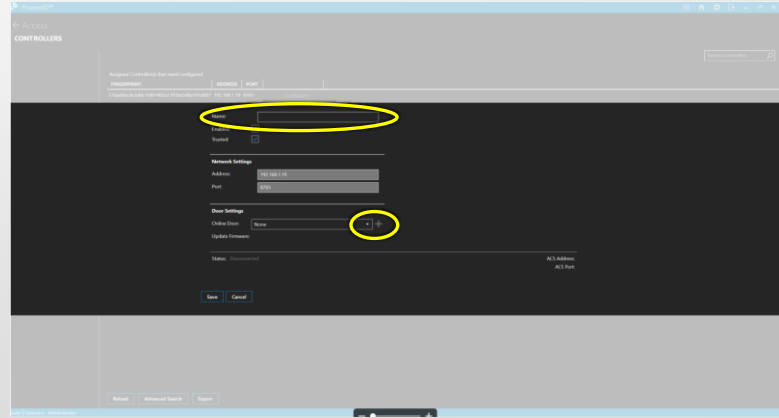
To add a controller to the system, click on the "Controller" module icon. After adding a Controller, you will then be able to select entry & exit readers that you have added into the "Doors" module to connect.



Any controller that is connected, within the guidelines of our BoxIQ Connectivity document located here on our website: [www.proxess.com/documents/BoxIQConnect](http://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



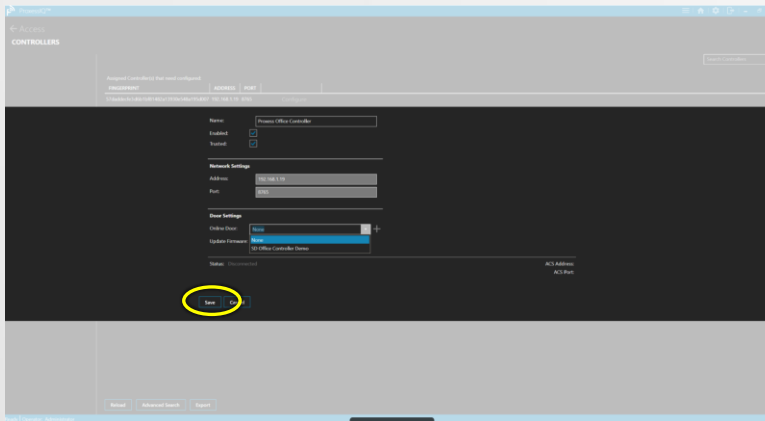
Now click "Configure" to have the software configure this controller for its proper function within this software instance.



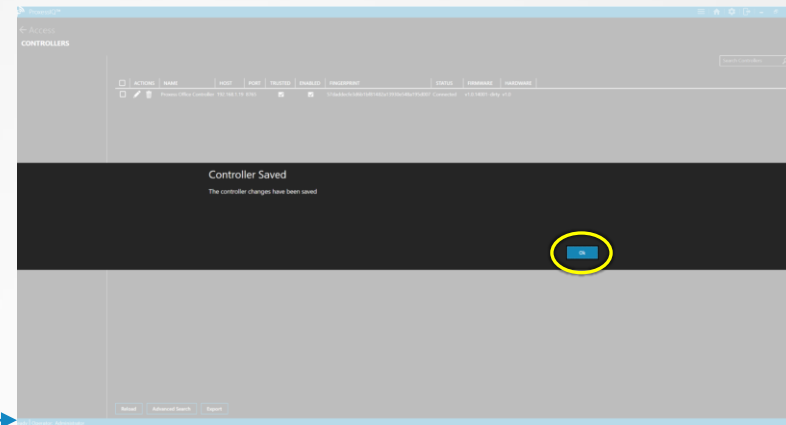
Type a name for this controller. Next, click on the drop-down arrow above.



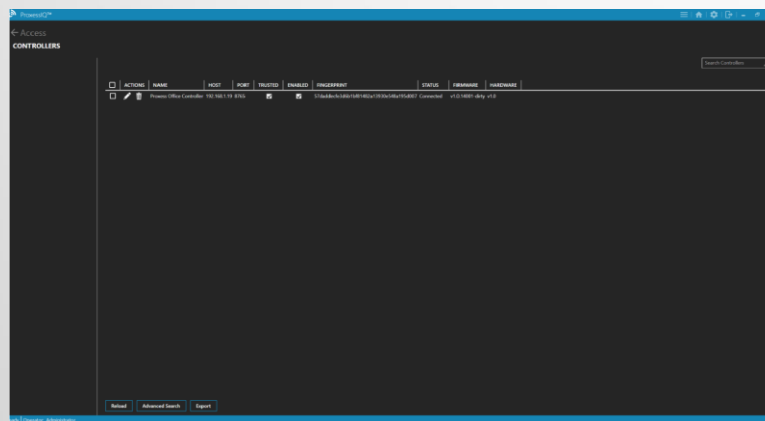
## Adding & Editing Controllers - 2



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

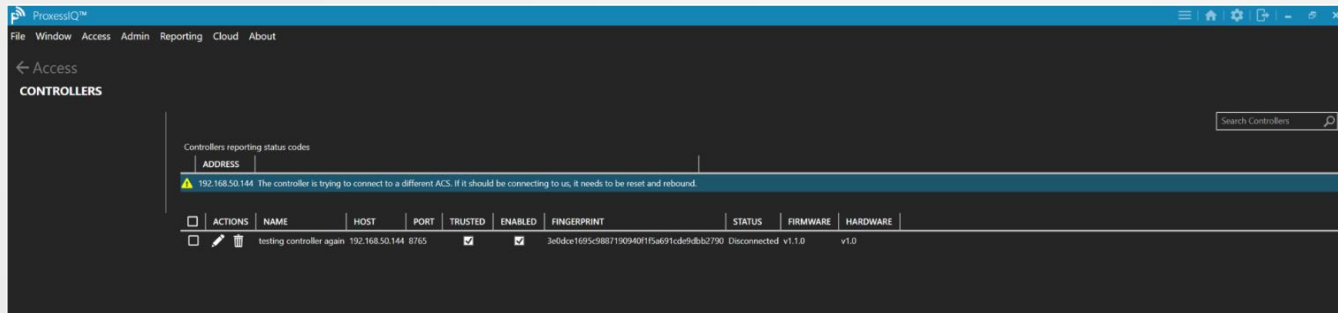


Click "OK" on the verification screen.



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





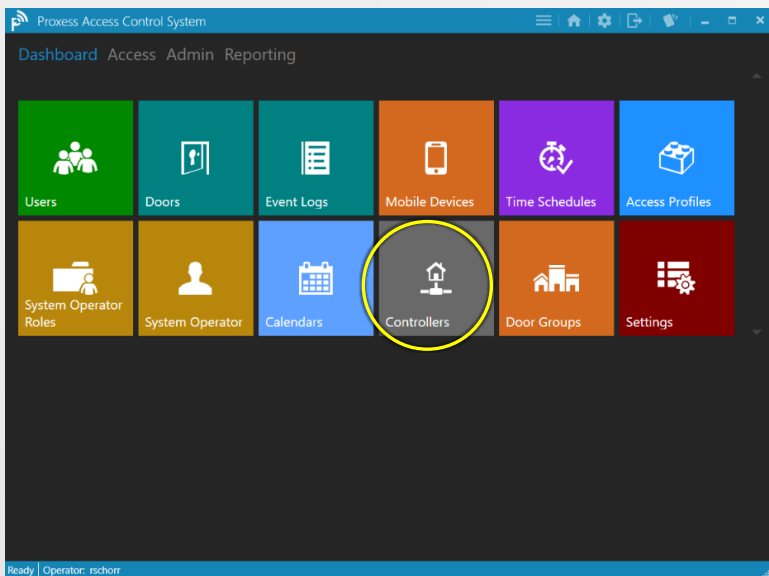
Note: It is unlikely, but possible to receive this Controller screen error message. For instance, if a controller from another system is placed on the network for your system (in a dealer's lab, for instance), your software will note the above, prompting your investigation and possible resetting of that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

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

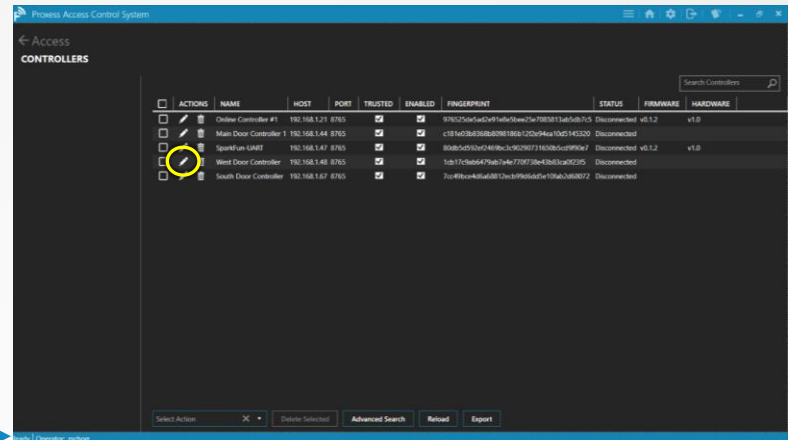
- Controllers reporting status codes
- New Controller(s) found on the network. Click "Bind" to assign the controller to this system.
- The Controller is unable to reach the Proxess service. Check inbound TCP firewall rules.
- The Controller is timing out during key exchange. This is likely caused by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



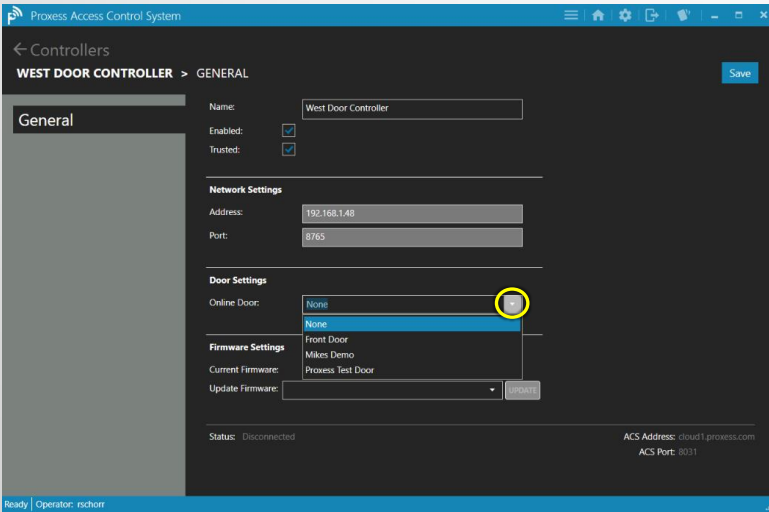
# Adding & Editing Controllers - 4



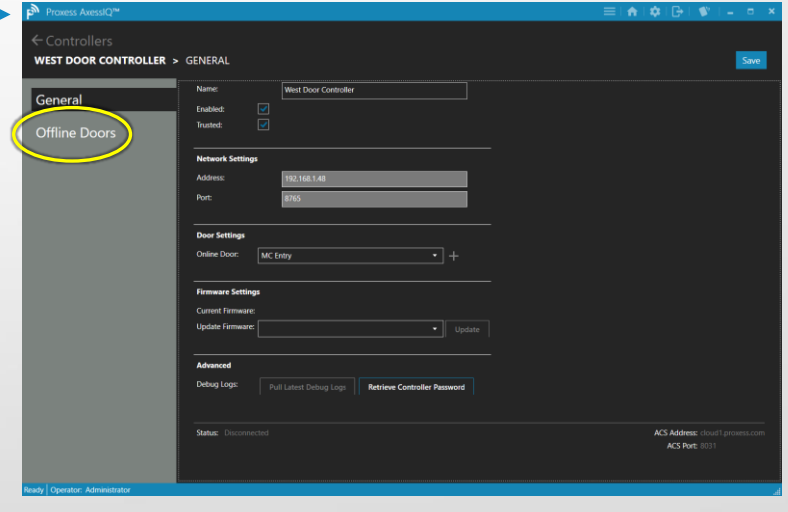
To add a door controller to the system, click on the "Controller" module icon. After adding a Controller, you will then be able to select entry & exit readers that you have added into the "Doors" module to connect.



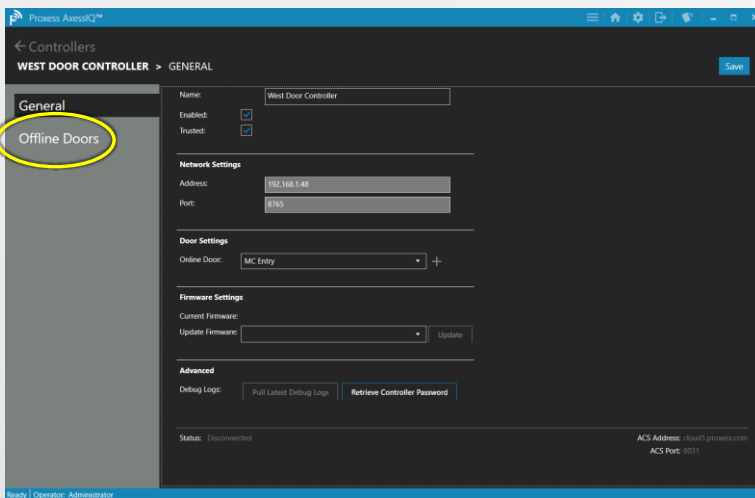
Now we will show how to add readers to a controller that is already in the system, click its *Edit* icon shown above.



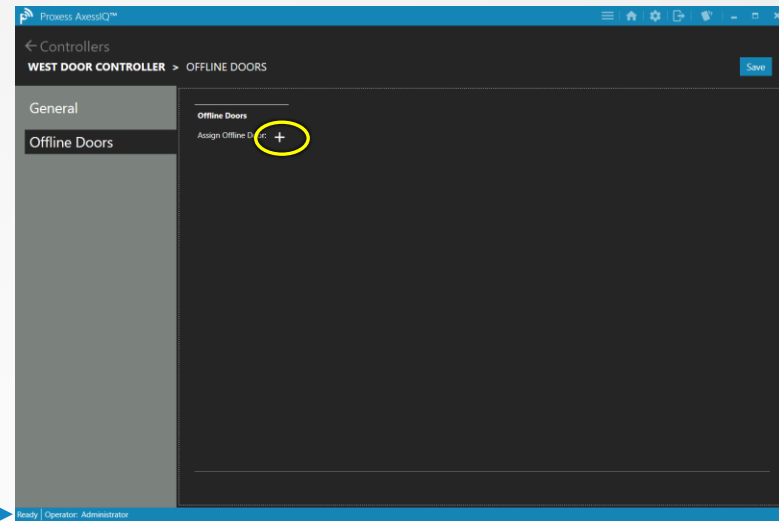
Add any door that has been defined as "Online" in the "Door Type" field of the *Doors* module may be connected to this controller by clicking this arrow and selecting it from the drop-down list.



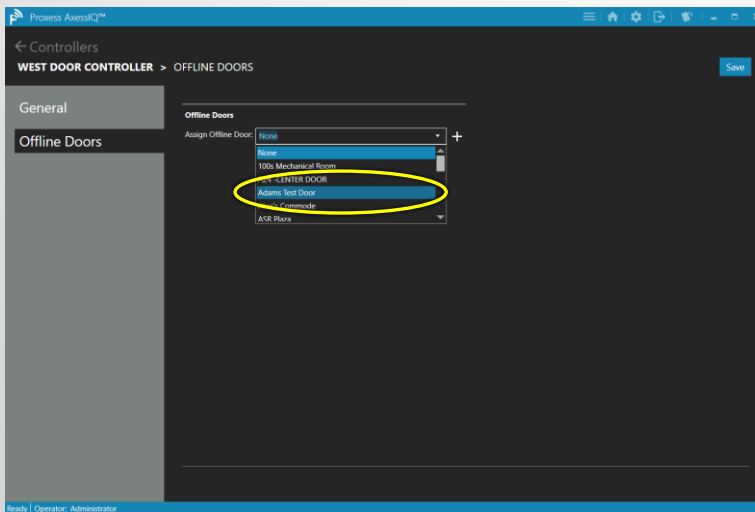
The Controller screen now shows the reader that has been attached to that Controller.



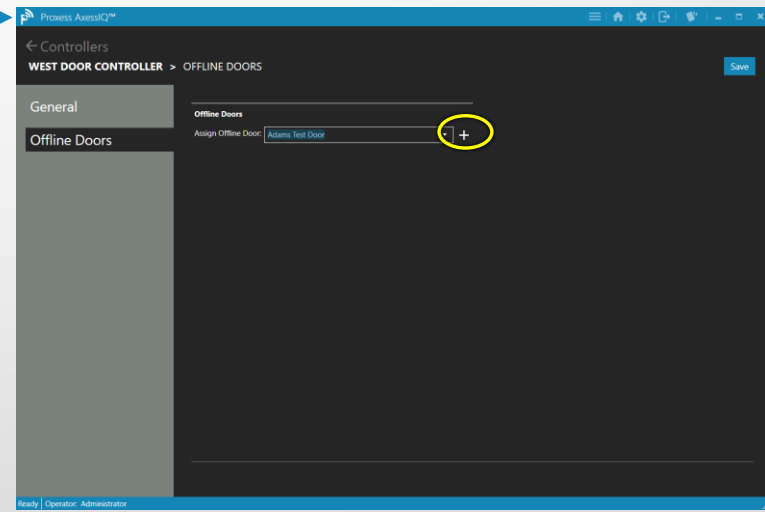
Now click on "Offline Doors" to bind cylindrical locksets, mortise locksets and Mini-Controllers to the Controller.



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.



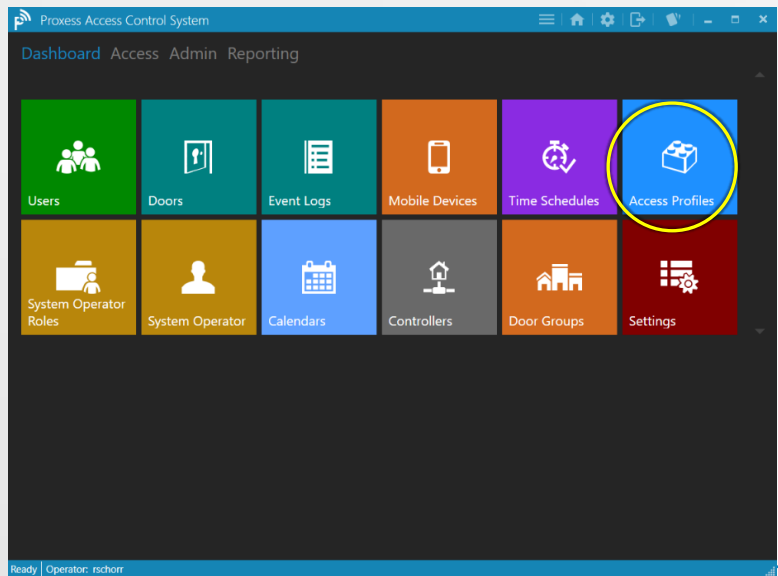
Up to eight (8) total locksets and mini-controllers can be connected to a controller.  
A lockset or M-C can only be connected to one (1) controller.  
Take care to select locksets or M-Cs to be connected that can easily be "seen" and controlled by the software, in the "Doors" module.



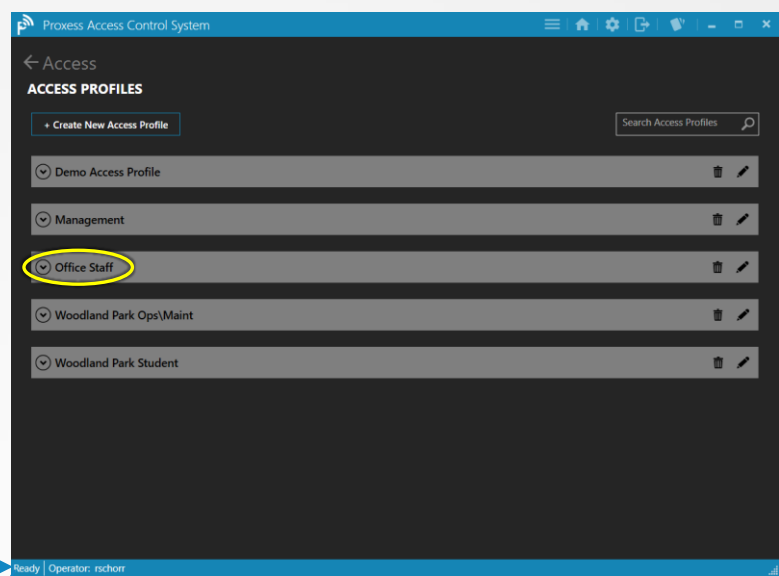
# ACCESS PROFILES



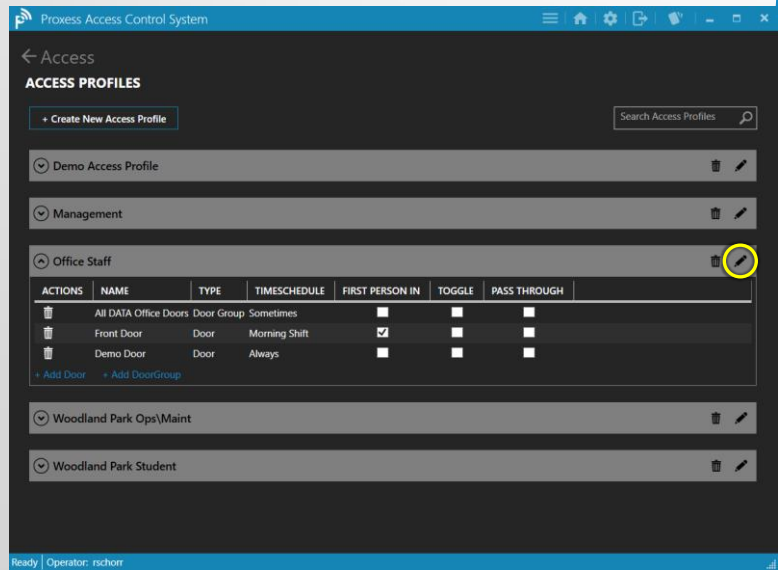
# Access Profiles - 1



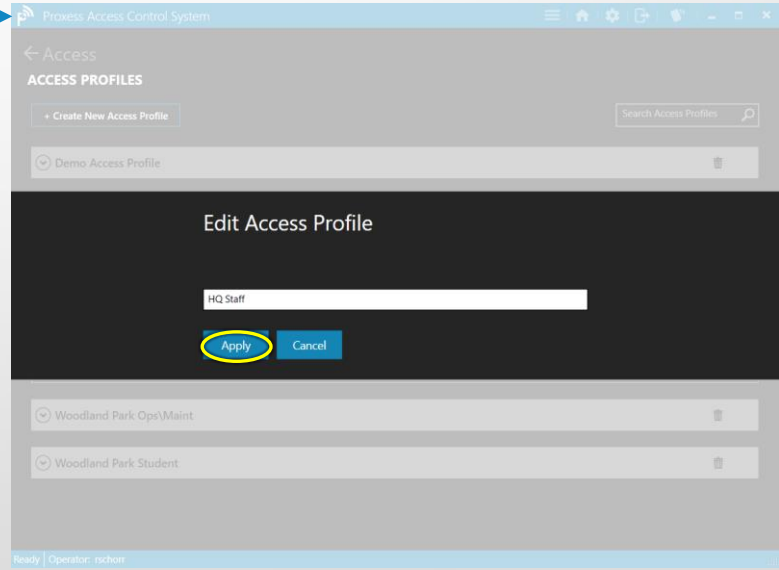
Access Profiles combine Time Schedules and Doors (and Door Groups) together and can then be assigned to Users. To create or edit them, click the "Access Profiles" icon.



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



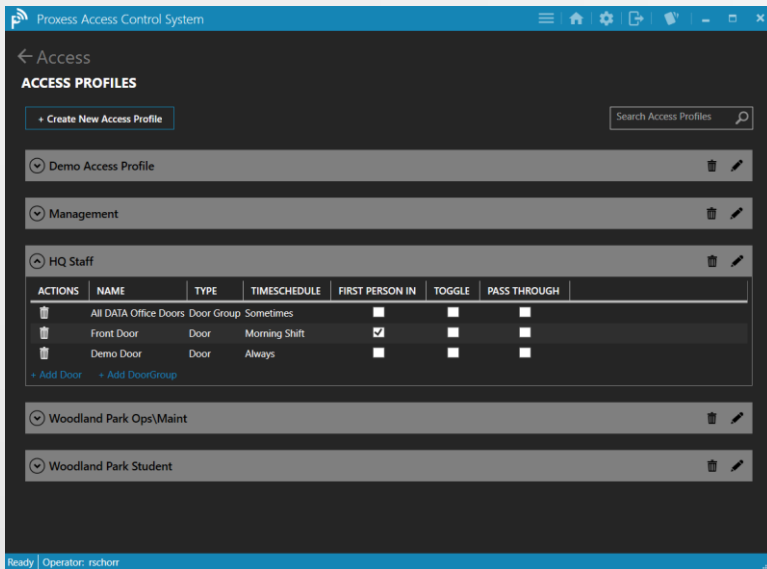
Click the Edit icon.



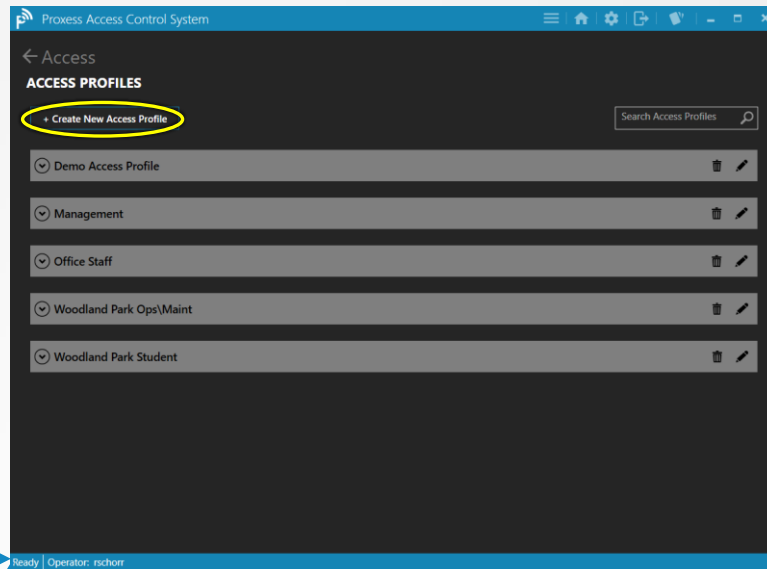
Change the name and click "Apply".



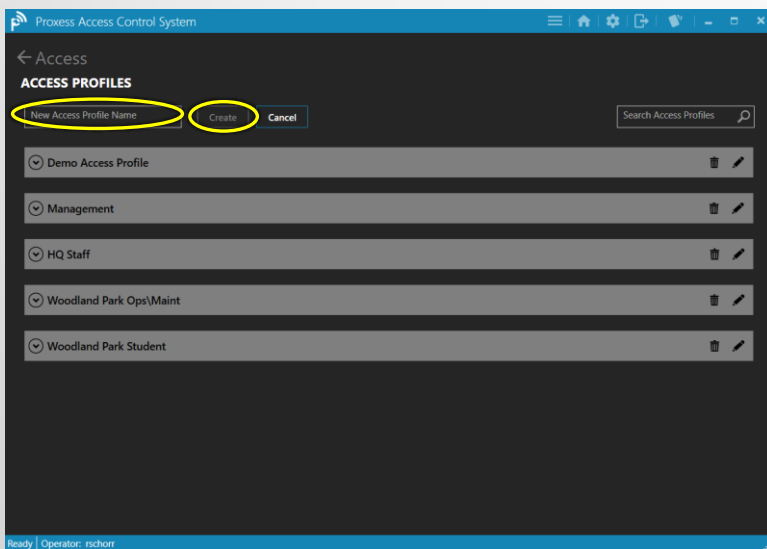
# Access Profiles - 2



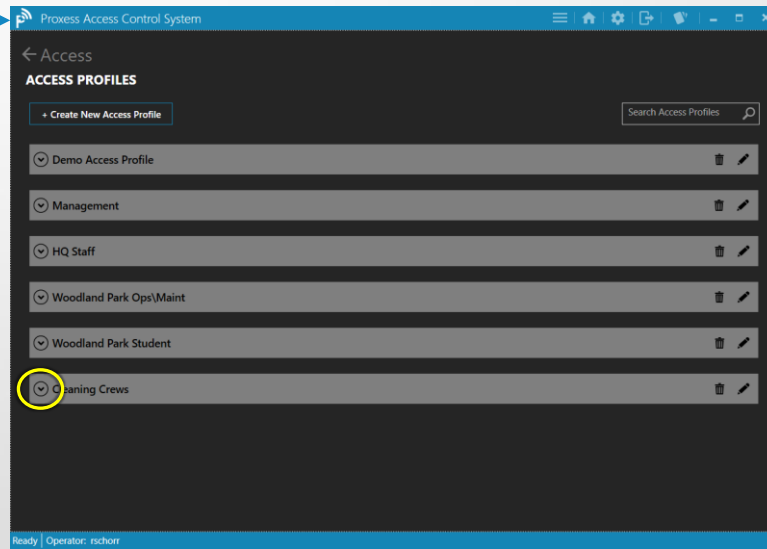
The new Access Profile name appears.



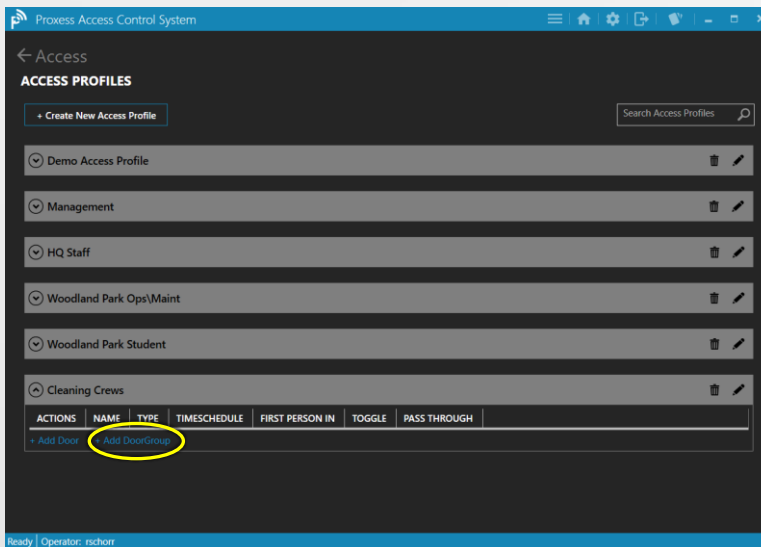
Click "Create New Access Profile".



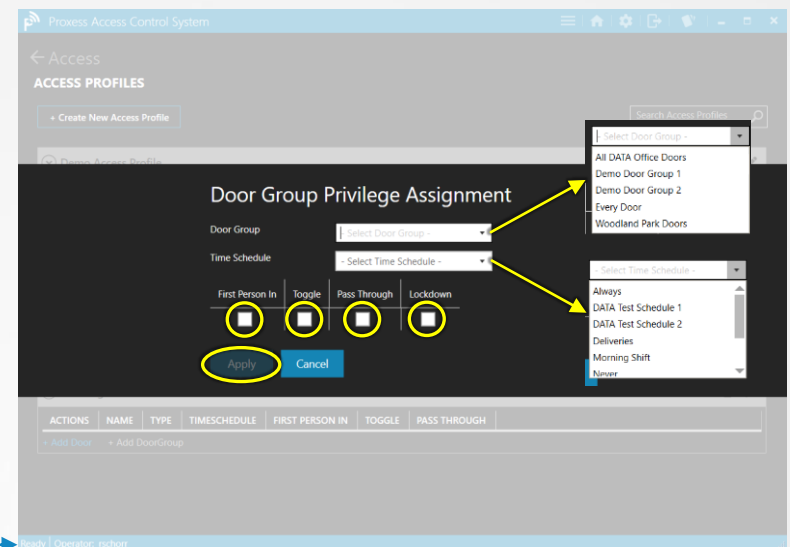
Enter a name for the new Access Profile and then click "Create".



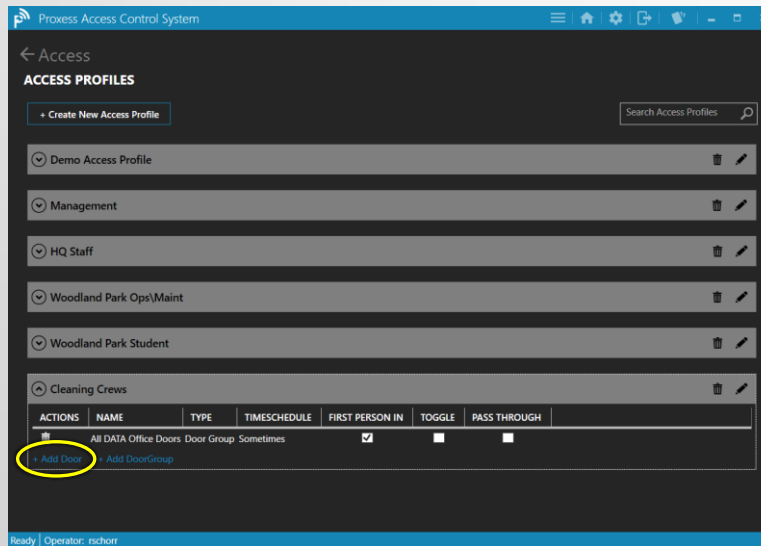
The new Access Profile appears. Click the dropdown arrow to view and edit the details.



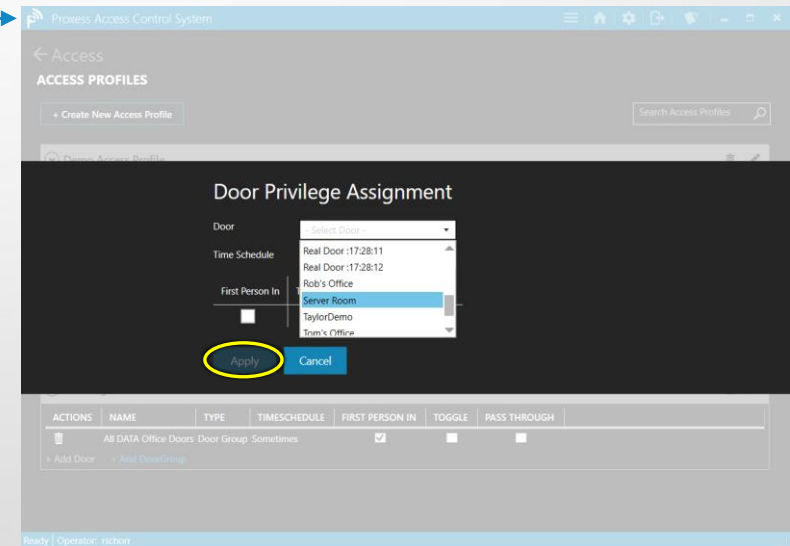
To add a Door Group to the new Access Profile, click "Add Door Group".



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".



# Access Profiles - 4

Proccess 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: rshort

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.





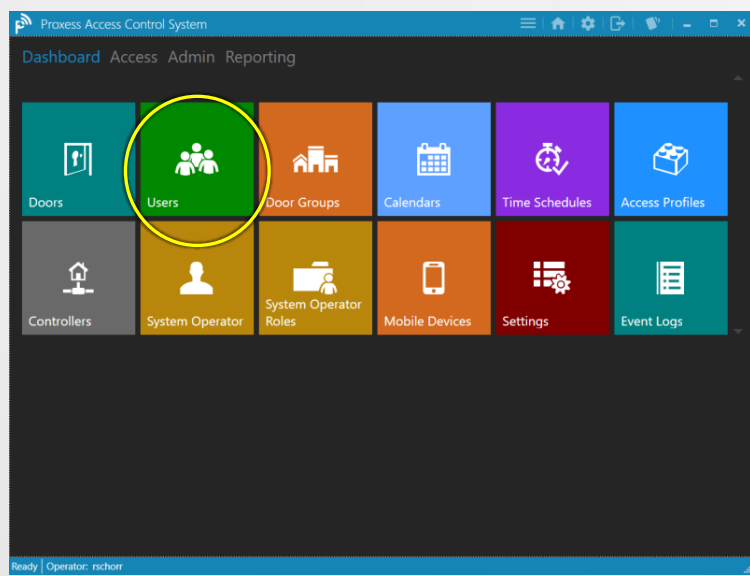
# USERS

## Adding & Editing

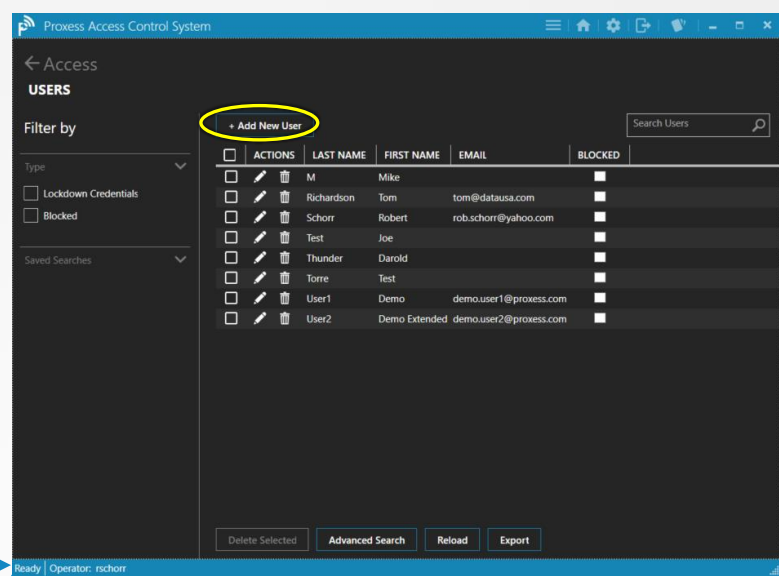
**PHYSICAL Credentials** (including cards, fobs and coin & portrait stickers) are addressed in this section.  
**Mobile Credentials** are addressed in the following section.



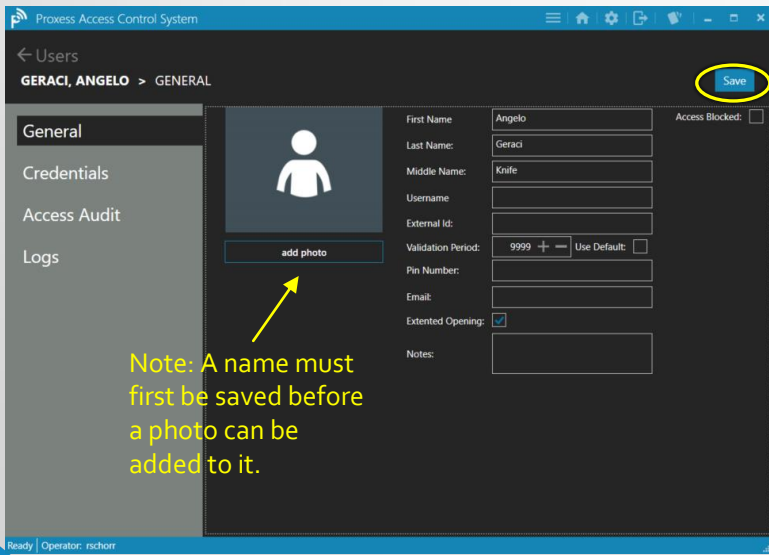
# Adding New Users & Credentials - 1



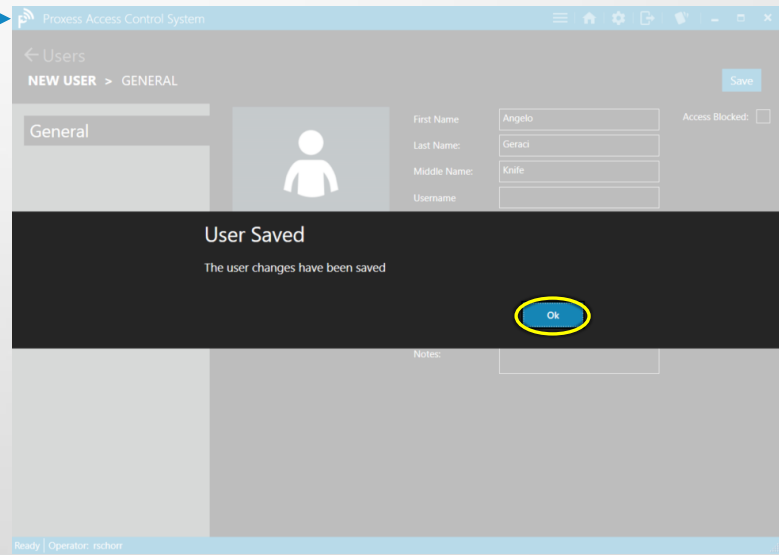
The Users module is where we add and edit new Users\ Cardholders and credentials. Their rights to access doors and door groups are also defined here. Click the "Users" icon.



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.



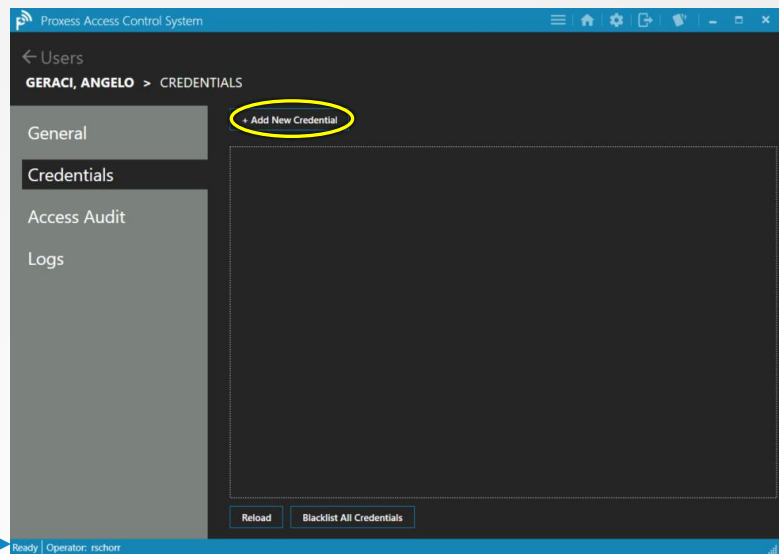
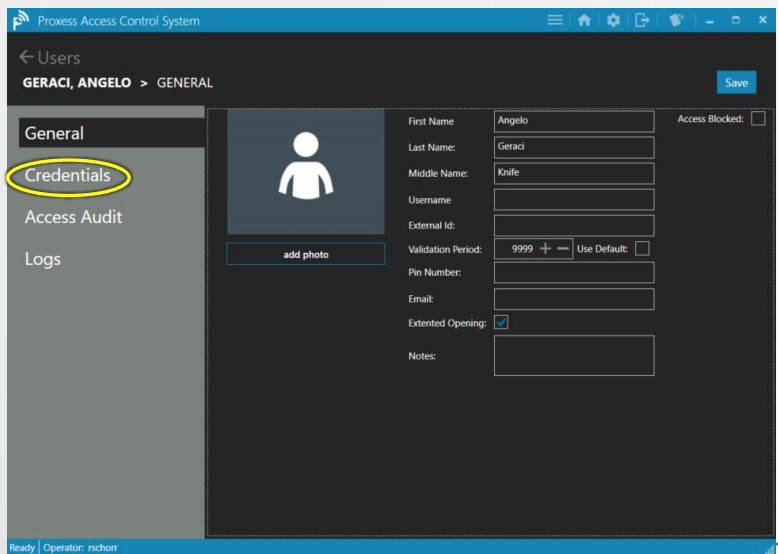
Note: A name must first be saved before a photo can be added to it.



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.

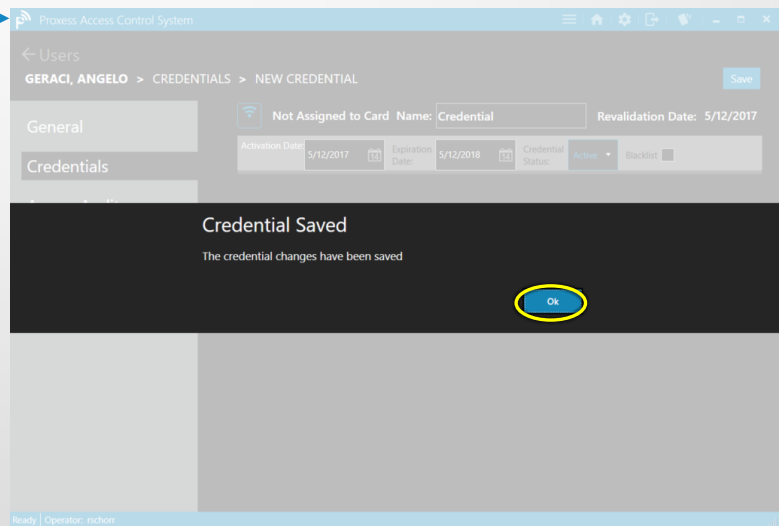
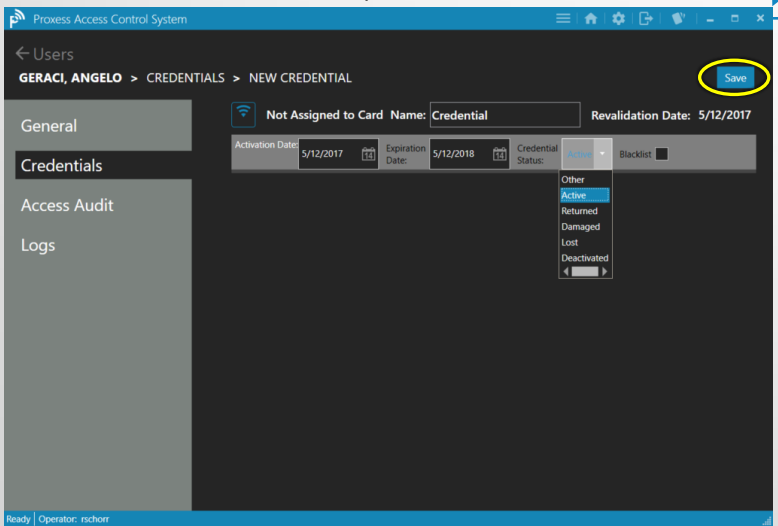


# Adding New Users & Credentials - 2



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.

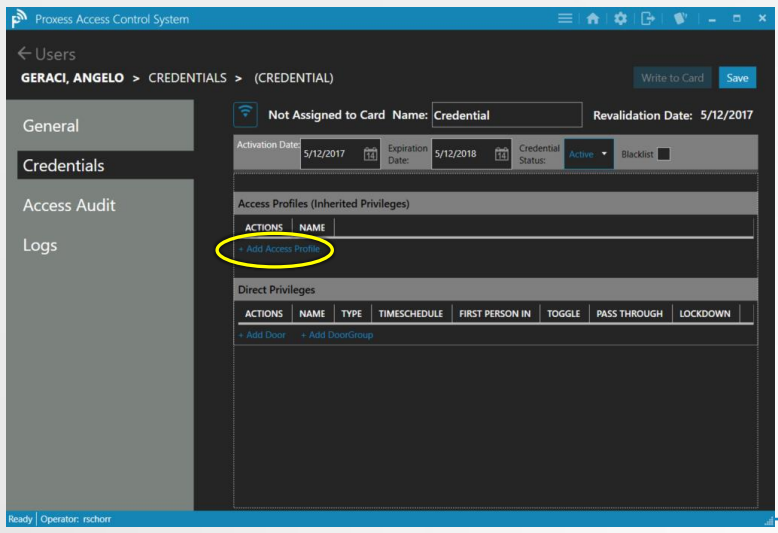
For this User, click "Add New Credential". As many credentials as desired may be issued to a User.



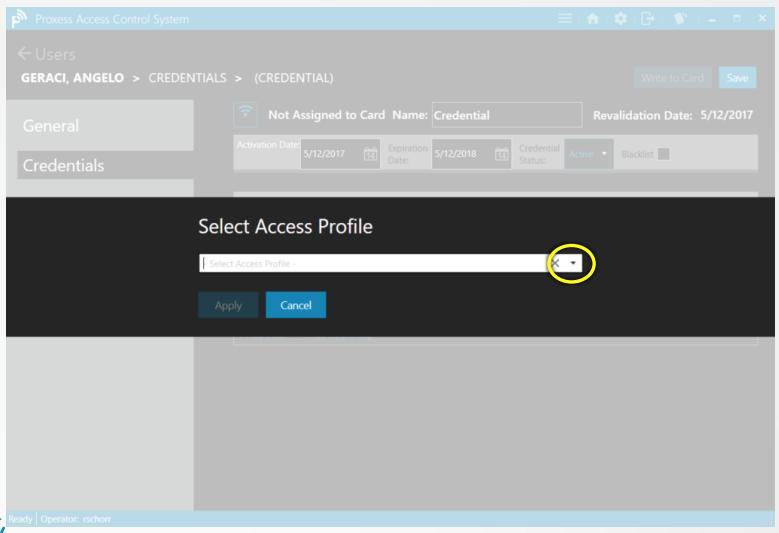
Select the Activation Date, which is usually left as the current date, but may be set at a future date. Select the Expiration Date of the card, which may be on an annual basis, by semester for schools, or at go days for evaluations of new hires. Select the Status of this credential and check the box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

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".

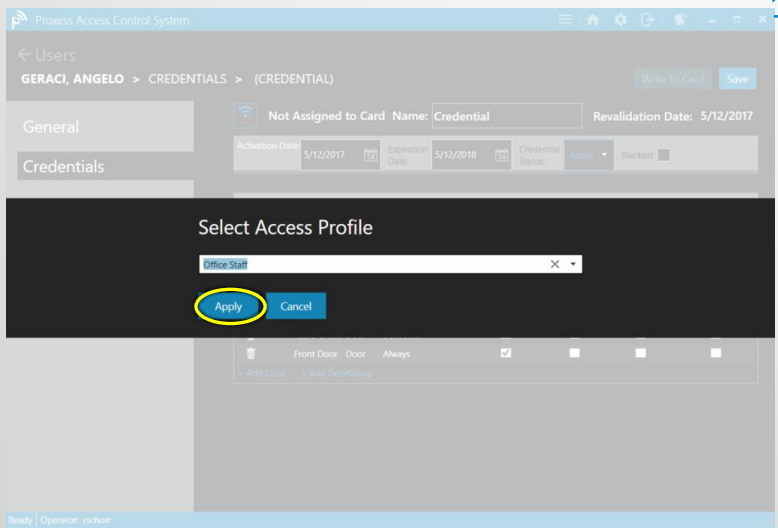
Adding New Users & Credentials - 3



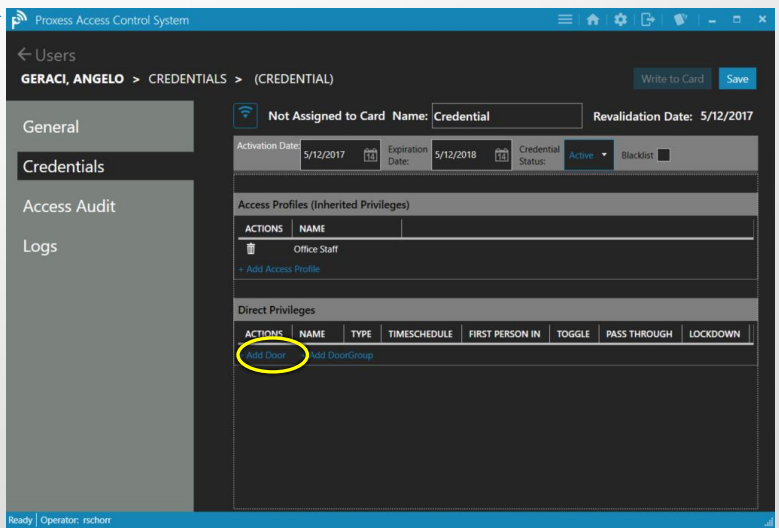
The rights for this credential to access various doors may now be selected. This is done by selecting one or more "Access Profiles" and/or one or more "Door Groups" and individual "Doors". These have been set up in their respective programming modules. Click "Add Access Profile", if desired.



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

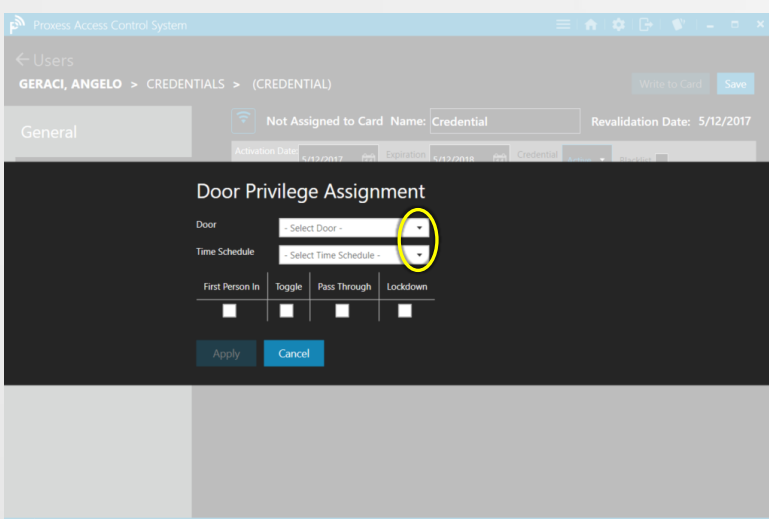


Select the desired Access Profile from the list and click "Apply".

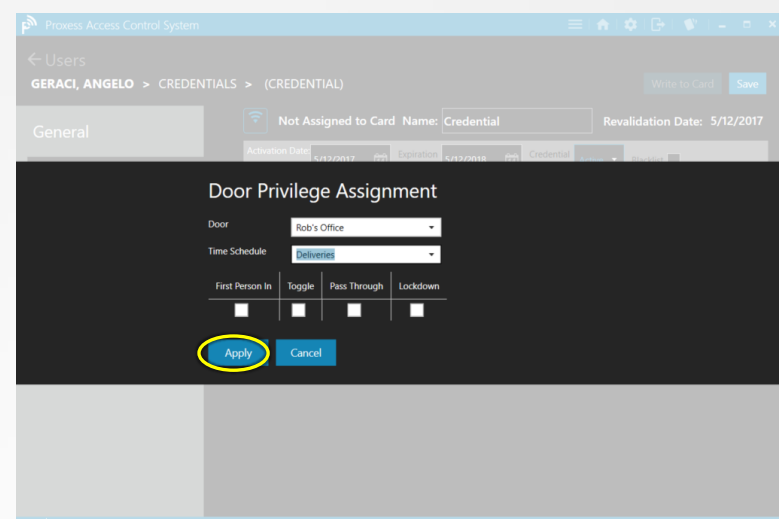


To add a door for this credential to have access to, click "Add Door".

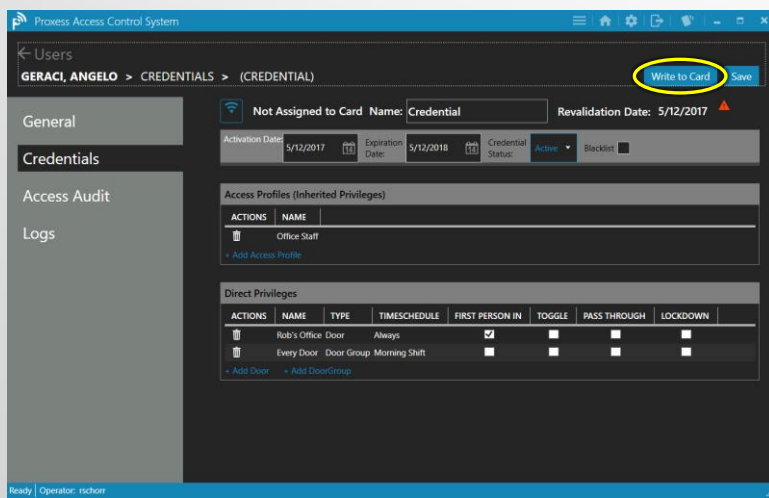
Adding New Users & Credentials - 4



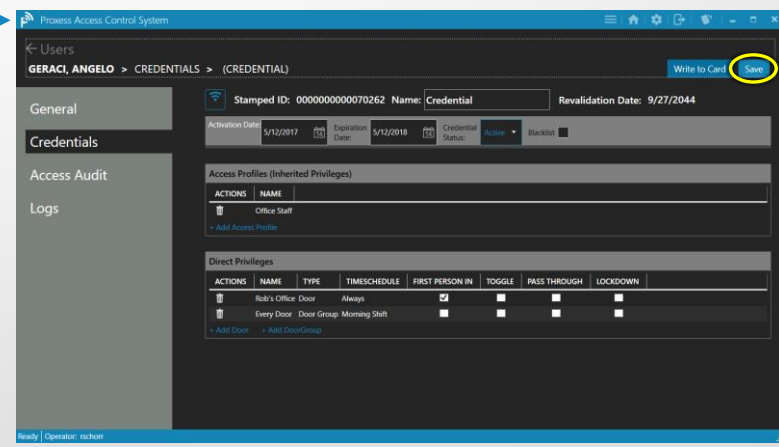
Click the dropdown arrow to select the first individual Door and then the Time Schedule for the credential to have access to it. Check the appropriate boxes to allow this credential to have First Person In rights, Use this door in a Toggle function, Pass Through\Enter a door that is in Lockdown mode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



Proxess Access Control System

Users

GERACI, ANGELO > CREDENTIALS > (CREDENTIAL)

Write to Card Save

General

Stamped ID: 00000000070262 Name: Credential Revalidation Date: 9/27/2044

Activation Date: 5/12/2017 Expiration Date: 5/12/2018 Credential Status: Active Backlist: [ ]

Credentials

Credential Saved

The credential changes have been saved.

OK

DOOR	TYPE	TIMESCHEDULE	FIRST PERSON IN	PASS THROUGH	LOCKDOWN
Rob's Office Door	Always	[ ]	[ ]	[ ]	[ ]
Every Door	Door Group Morning Shift	[ ]	[ ]	[ ]	[ ]

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

Proxess Access Control System

Users

GERACI, ANGELO > CREDENTIALS > (CREDENTIAL)

Write to Card Save

General

Not Assigned to Card Name: Credential Revalidation Date: 5/12/2017

Activation Date: 5/12/2017 Expiration Date: 5/12/2018 Credential Status: Active Backlist: [ ]

Credentials

Access Profiles (Inherited Privileges)

ACTIONS	NAME	TYPE
[ ]	Office Staff	[ ]

Direct Privileges

ACTIONS	NAME	TYPE	TIMESCHEDULE	FIRST PERSON IN	TOGGLE	PASS THROUGH	LOCKDOWN
[ ]	Rob's Office Door	Always	[ ]	[ ]	[ ]	[ ]	[ ]
[ ]	Every Door	Door Group Morning Shift	[ ]	[ ]	[ ]	[ ]	[ ]

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

Proxess Access Control System

Users

GERACI, ANGELO > ACCESS AUDIT

General

DOOR	CREDENTIAL NAME	ASSIGNMENT TYPE	VIEWS
Rob's Office	Credential	Credential	[ ]
Front Door	Credential	Access Profile	[ ]
Demo Door	Credential	Access Profile	[ ]

Credentials

Access Audit

Logs

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

Proxess Access Control System

Users

GERACI, ANGELO > FRONT DOOR > ACCESS AUDIT > FRONT DOOR(NODE-VIEW)

General

Credentials

Access Audit

Logs

Angelo Geraci

(Credential)

Office Staff

Every Door

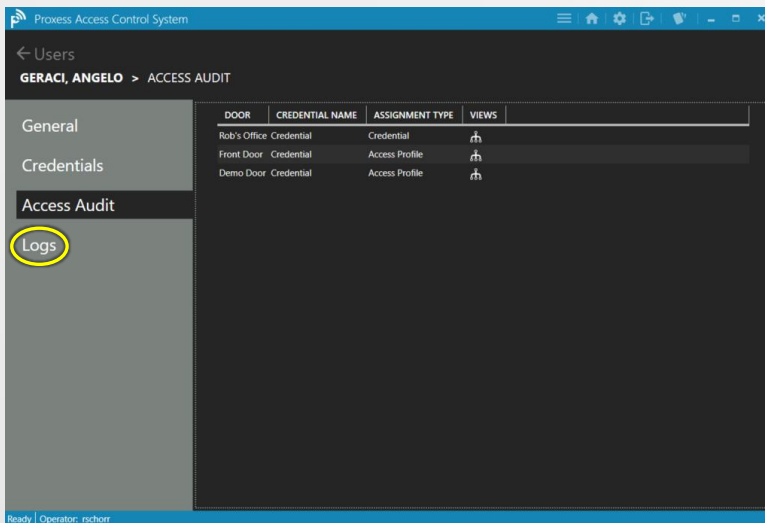
All DATA Office Doors

Front Door

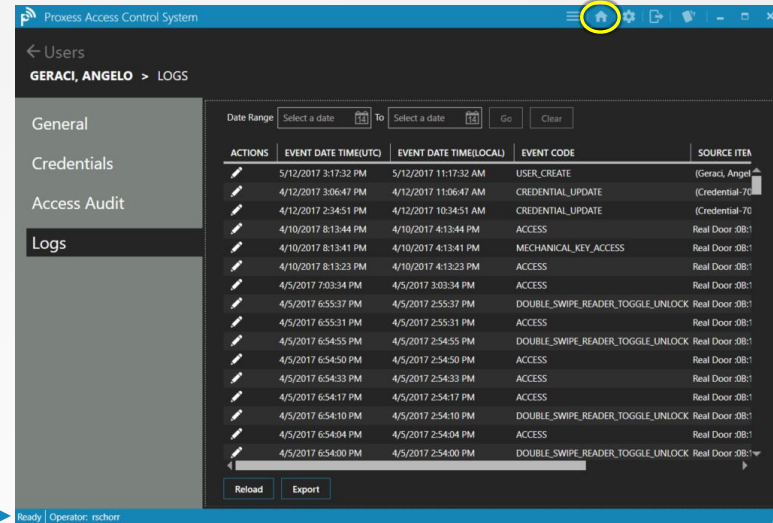
This Access Audit view shows the relationship between the cardholder and their credentials and the door selected on the previous screen. The insert on the bottom right of the screen allows you to see the entire relationship tree and the slide bar at the top of this insert can be moved to widen or narrow the main screen view. Click "X" in the top right to close this view and return to the list of doors.



# Adding New Users & Credentials - 6



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



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

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



# USERS

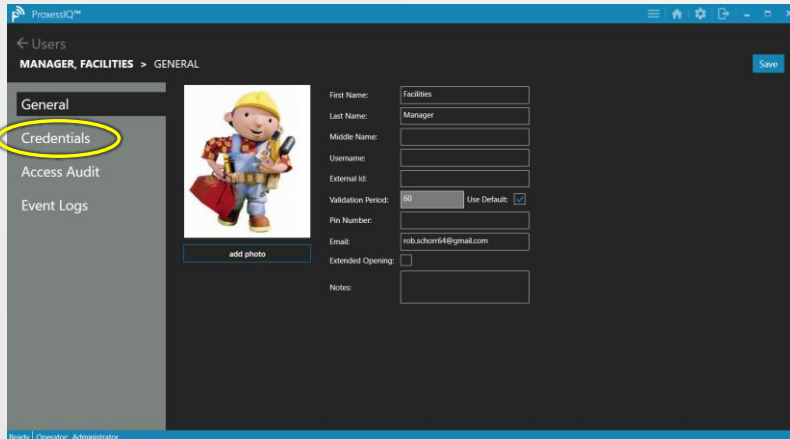
## Adding & Editing

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

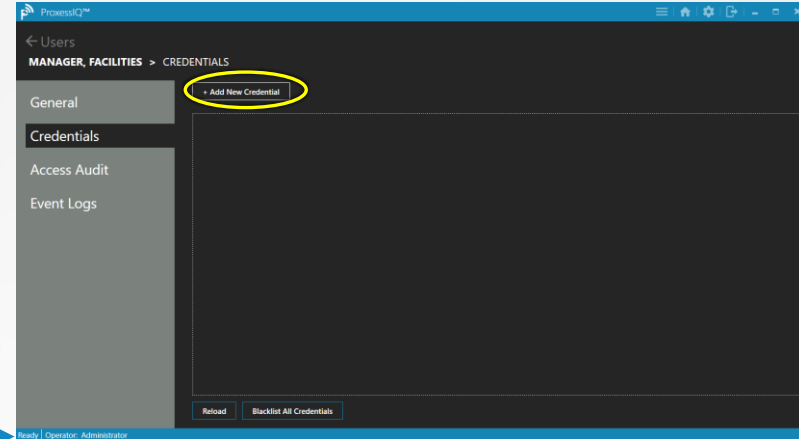




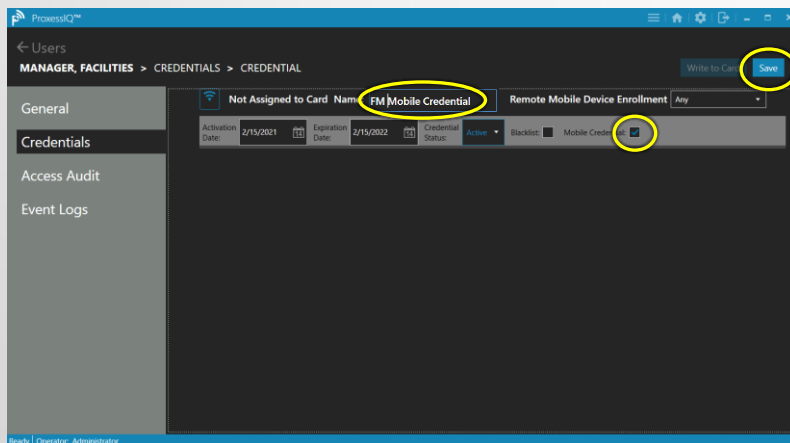
# Adding New Users & Mobile Credentials - 1



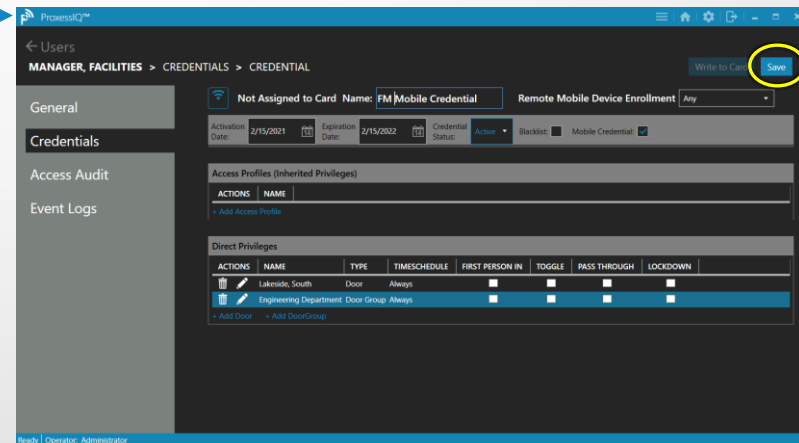
Now that the new user has been created and saved, we can assign a card\ credential to them. This can be done now, or anytime in the future, by returning to their record, going to the Users module and clicking on the edit icon for their name. For now, click "Credentials" to proceed.



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"

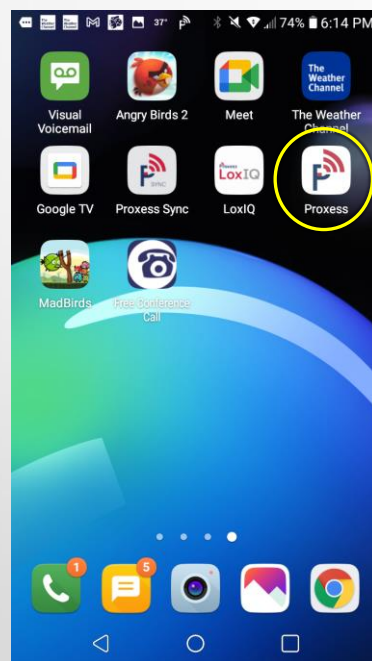
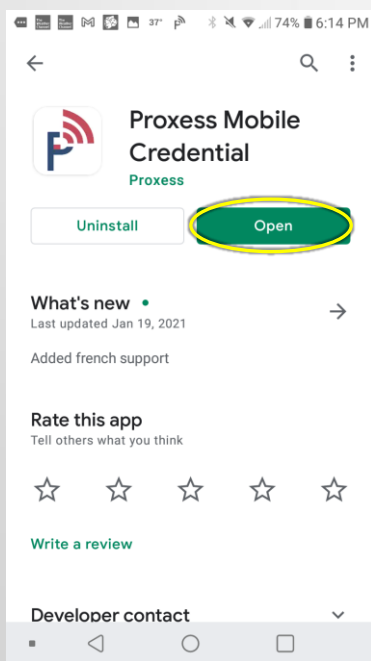
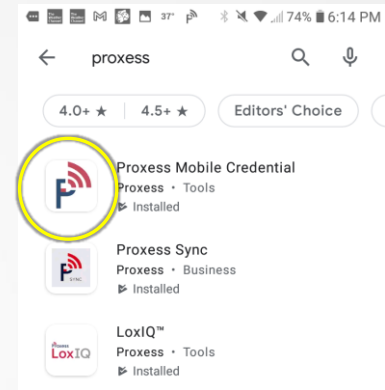
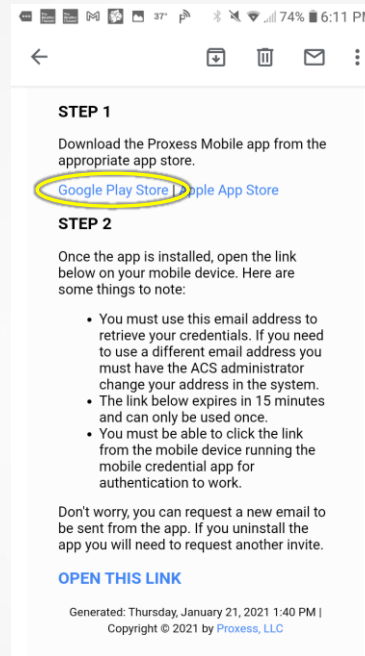
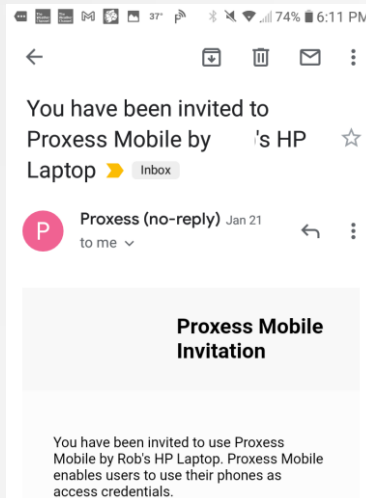
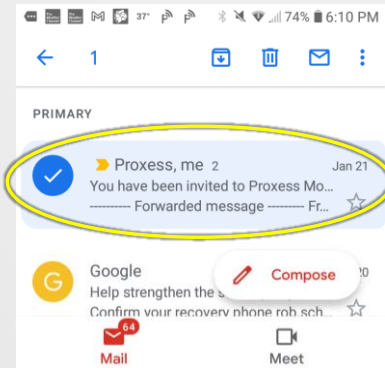


You may now assign Privileges (a.k.a. access rights) for this Mobile Credential, as defined in the previous section. In this case we will assign the Privilege for this credential to access the Door Group Engineering Department, during the Time Schedule Always and the individual Door Lakeside, South,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



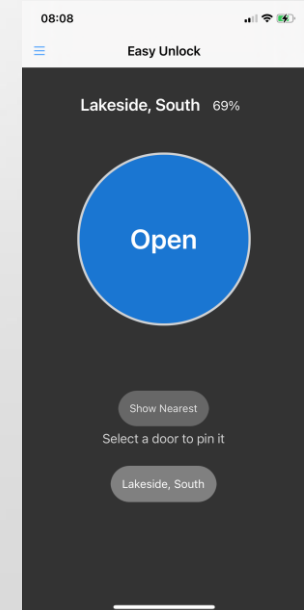
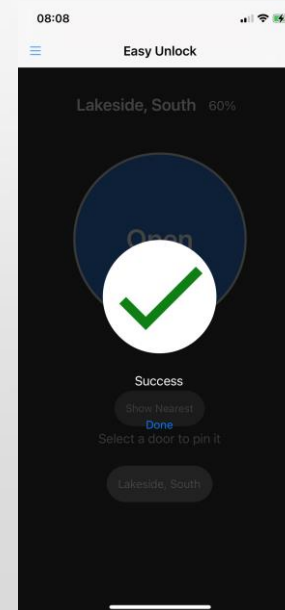
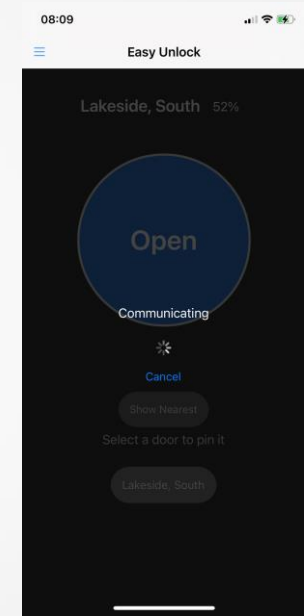
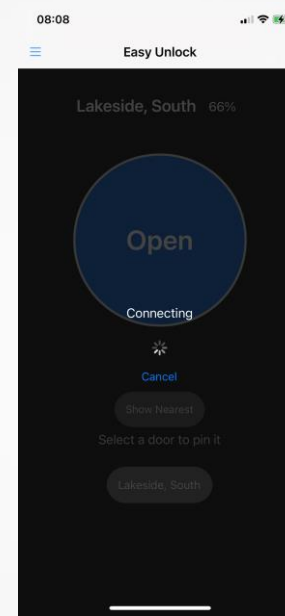
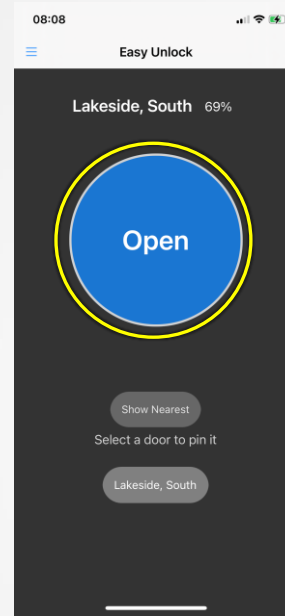
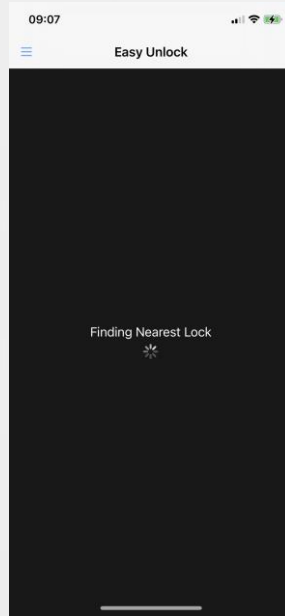
Adding New Users & Mobile Credentials - 2

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.





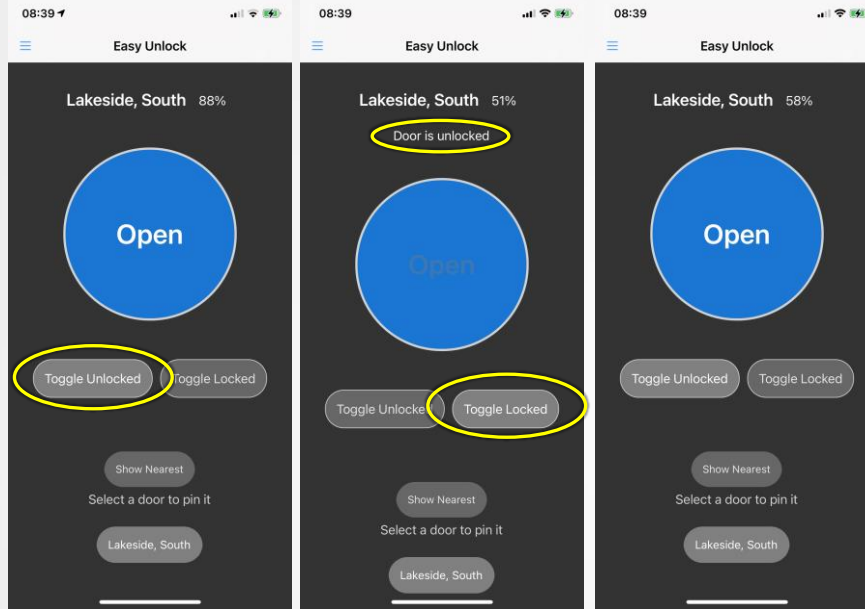
The Mobile Credential app will open in "Easy Unlock" mode, where it will automatically find and display the door with the greatest signal strength (usually the closest door as well). Tap the "Open" button for the door you wish to access and it will unlock. For the best user experience, open your app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





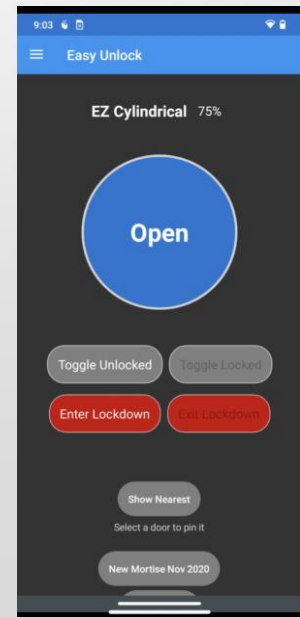
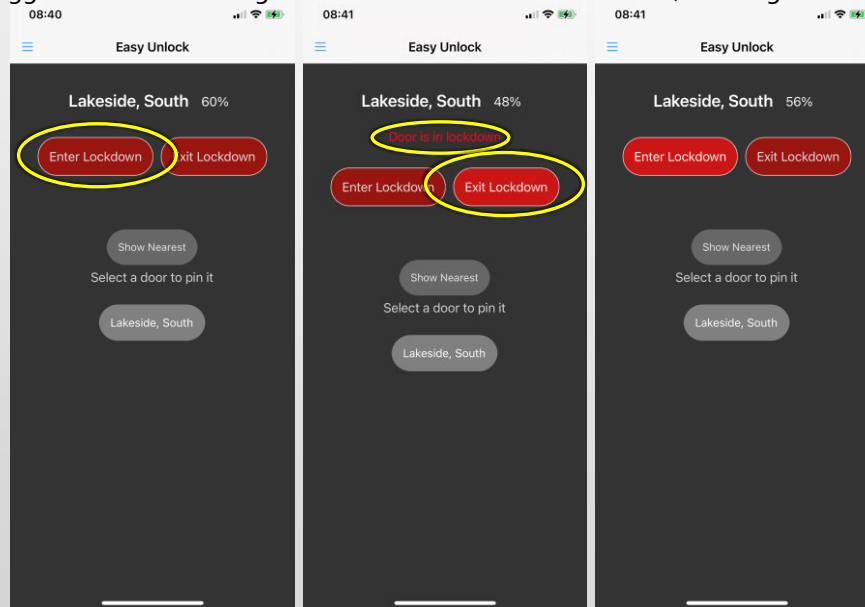
When creating a Mobile Credential, you may assign Toggle rights. In this case, the "Toggle Unlocked" and "Toggle Locked" buttons will display. Toggled locks remain Unlocked (no credential required to enter) until either Toggled Locked or until the next Time Schedule occurs requiring the lock to be in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

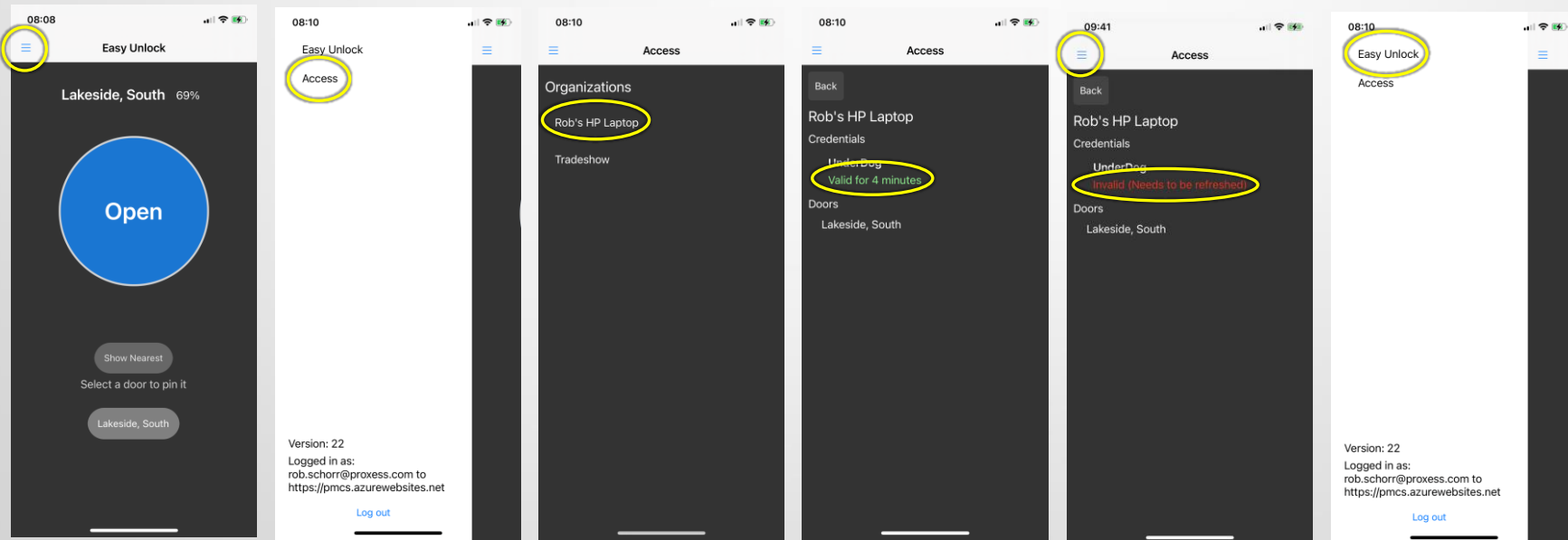
When the lockset has entered the Lockdown mode, a note in red will display. Once removed from the Lockdown mode the note will be removed.





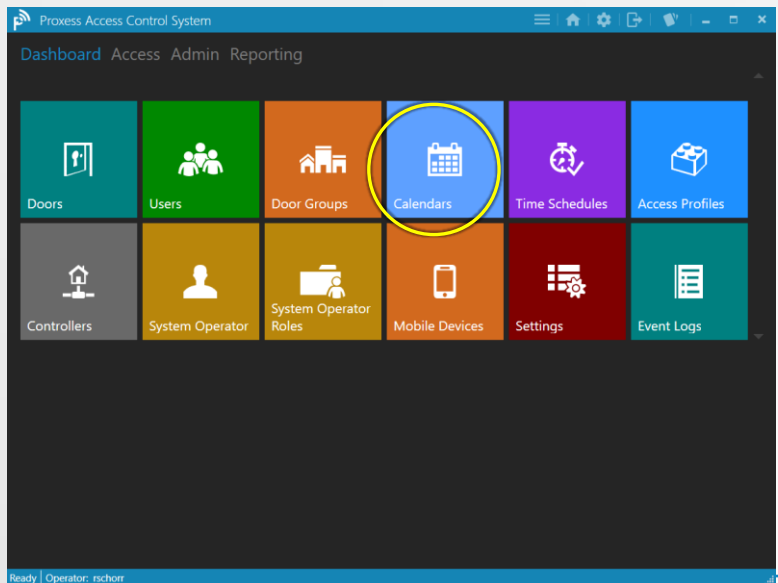
By default, the Mobile Credential will open in the "Easy Unlock" mode. In this mode, the app will automatically locate and display the door with the greatest signal strength... Tap the hamburger icon in the top left to bring up the mode menu. Click on the "Access" mode and all of the Organizations that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

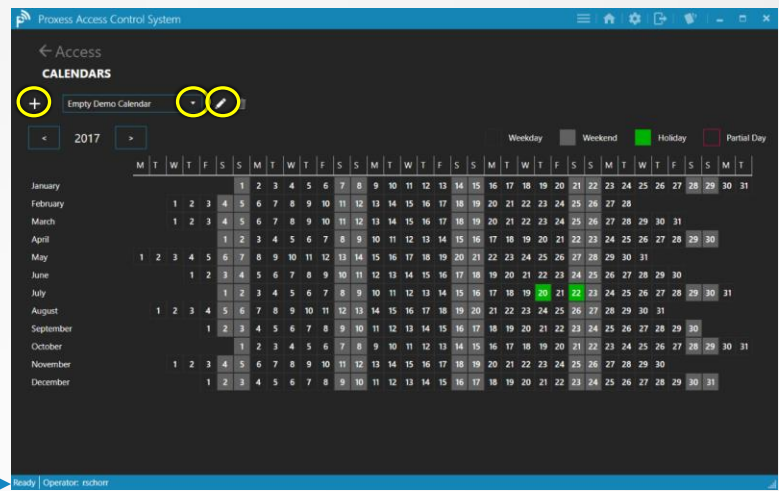




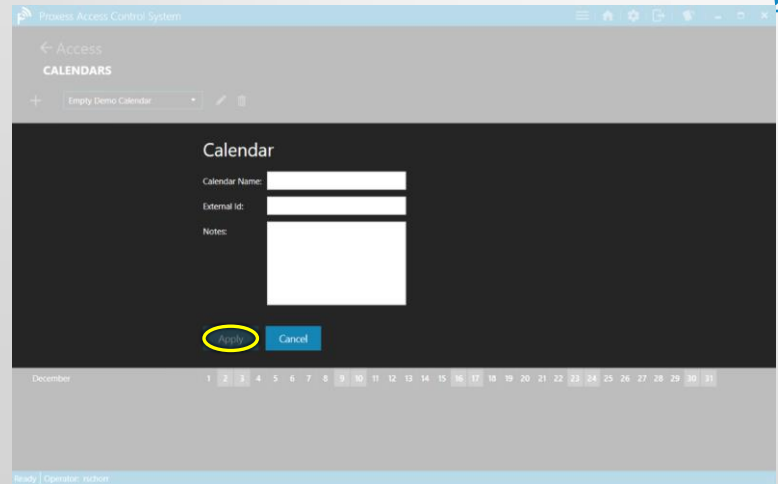
# CALENDARS



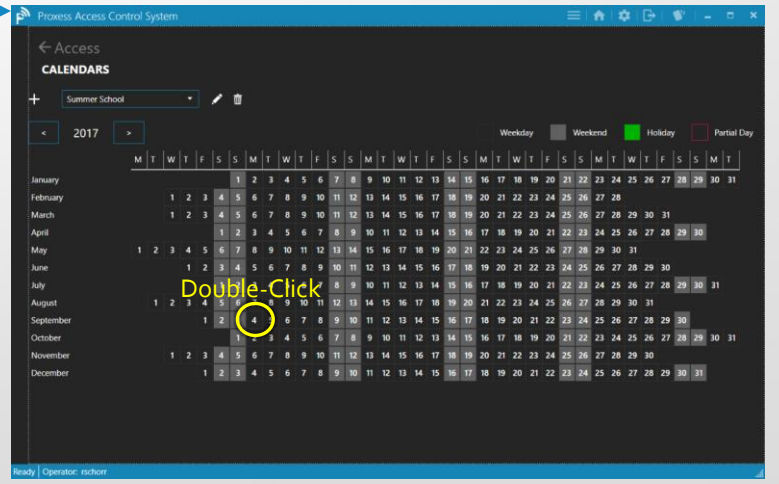
Click the icon for the "Calendars" module. Calendars are where you add traditional Holidays and other specialty days. Specialty days can be planned in advance (e.g. weddings at a church, sports games at a school), or added on-demand (e.g. weather related event).



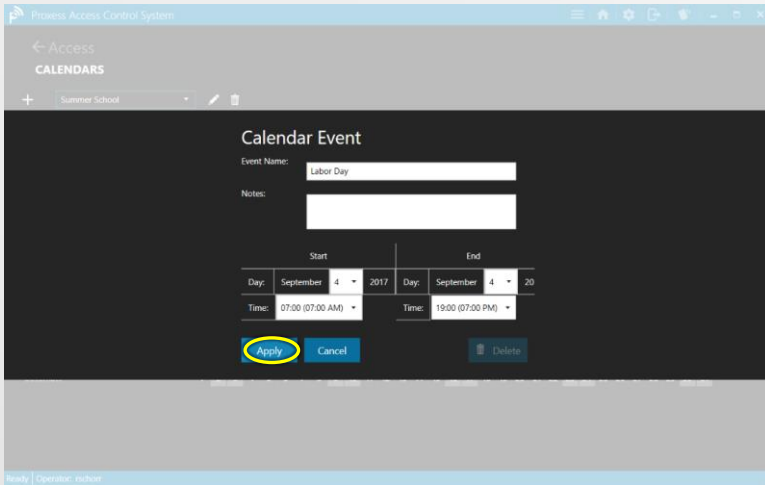
The Default calendar will appear, if this is a new system. Since a customer may have multiple locations, with each location abiding by different calendars, you may create multiple Calendars and apply a different Calendar to each lockset and door. Click the dropdown arrow to select a Calendar to view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



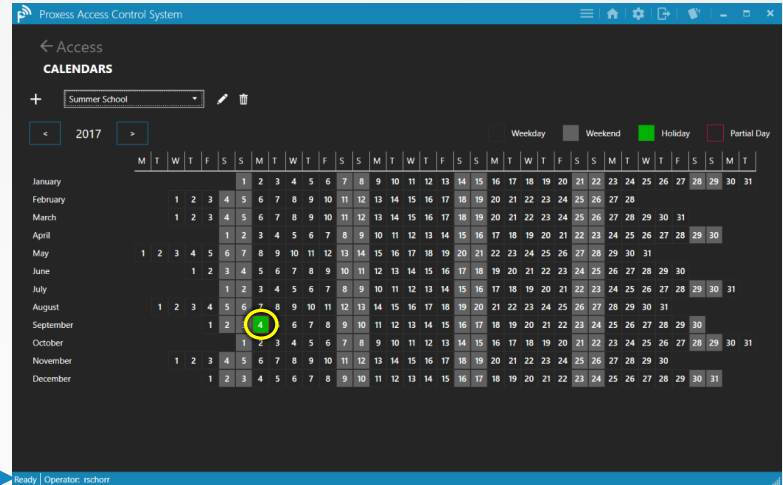
Enter the name for the new Calendar. This is the name that will appear in all the Doors selection screens. The External ID is optional and is an alternate reference that the customer may have. Enter any further notes you may have. Click "Apply" to continue.



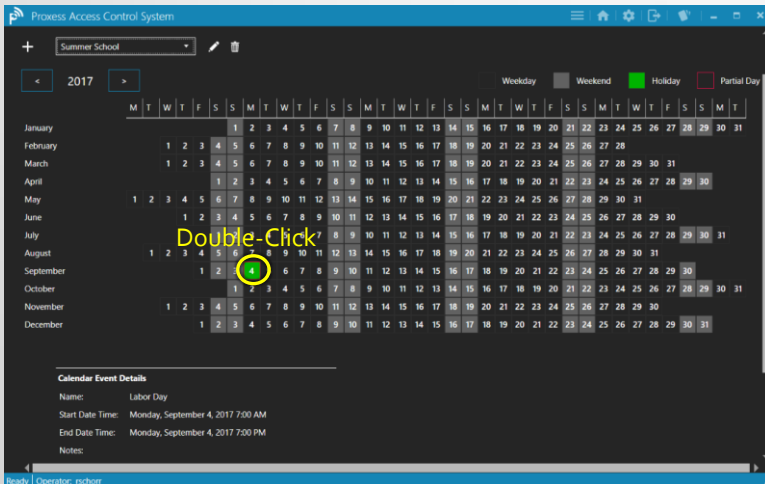
The Calendar you just created appears. To begin adding days for a Door to operate\function differently than normal\programmed, click on any day for the current year that is displayed (2017 in this case). To add a Calendar Event, Double-click on any day.



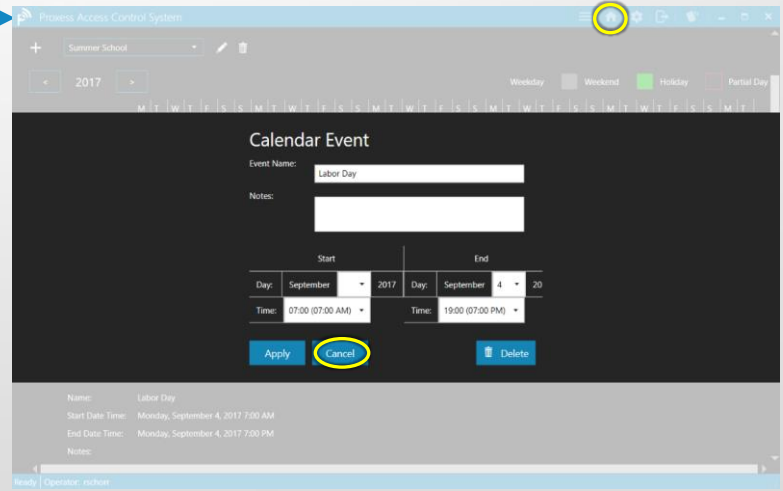
The page to create a new Calendar Event appears. Enter the Event Name you want along with any optional clarification Notes. Select the Start and End days and times for this special Door operation to occur and click "Apply" to save this new event.



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.

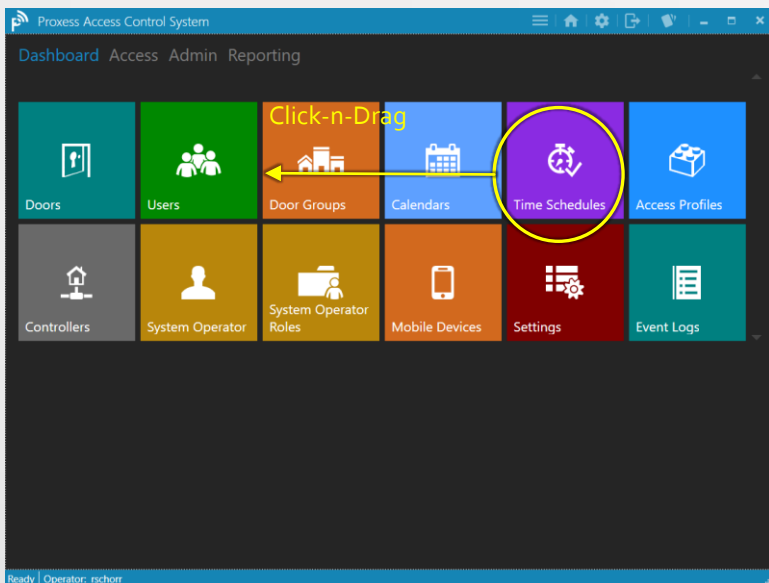




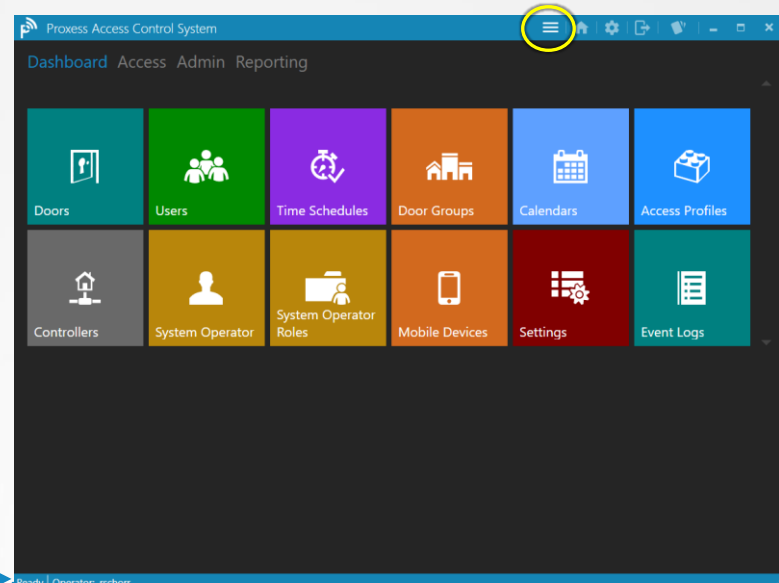
# USER INTERFACE FLEXIBILITY



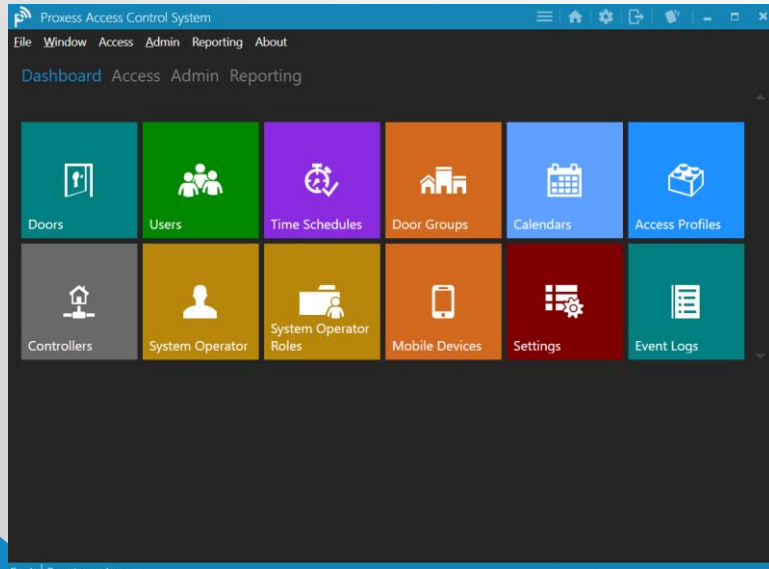
# User Interface Flexibility - 1



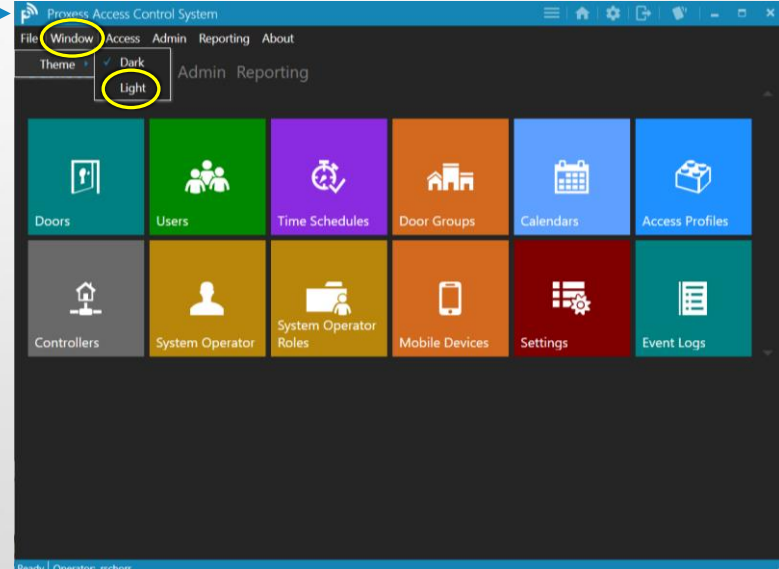
The Dashboard \ Home Screen \ User Interface may be customized in several ways. First, you may click-and-drag any module to another part of the screen, thus rearranging the module icons.



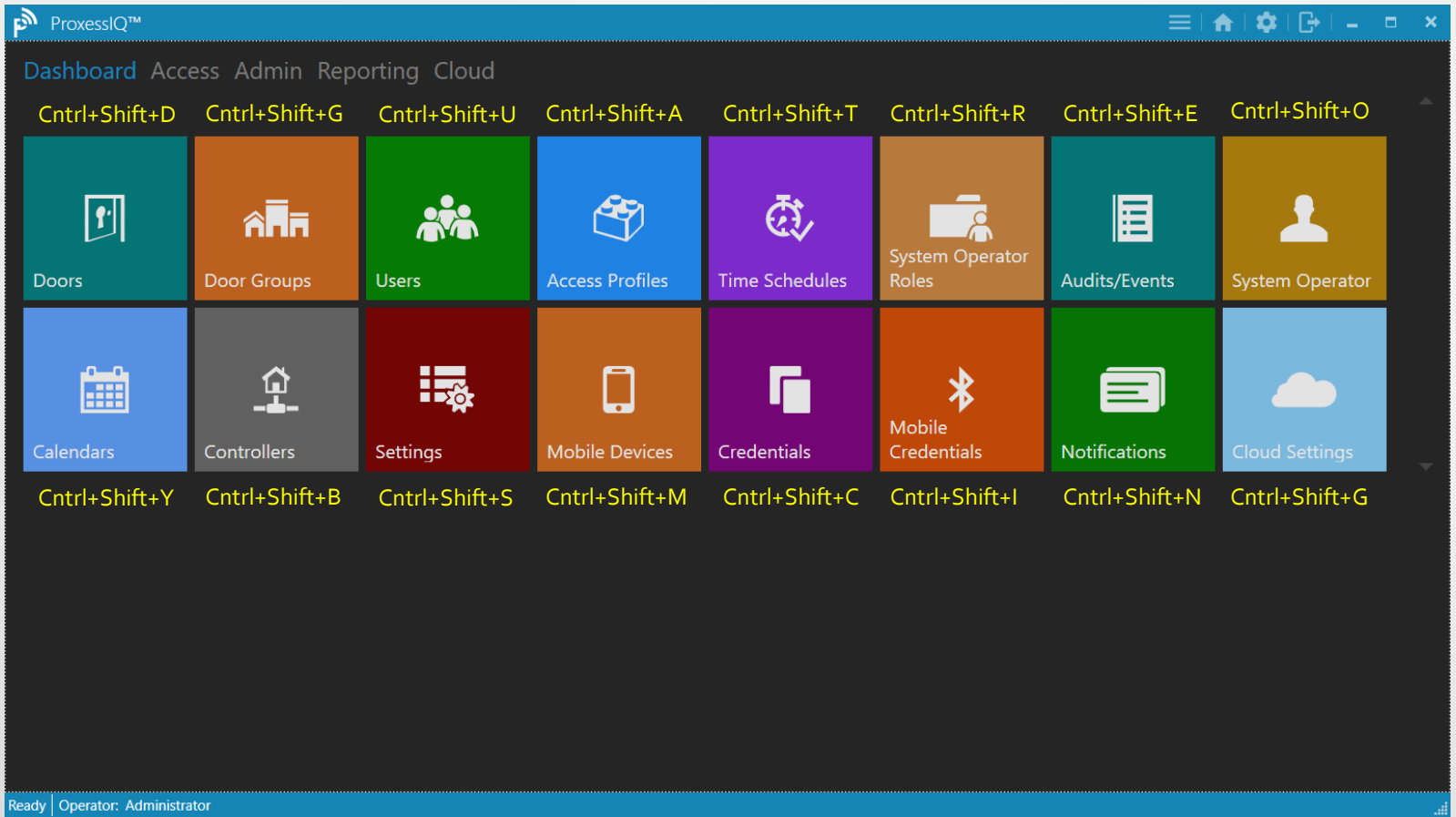
By clicking on the icon highlighted on the top taskbar...



...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.



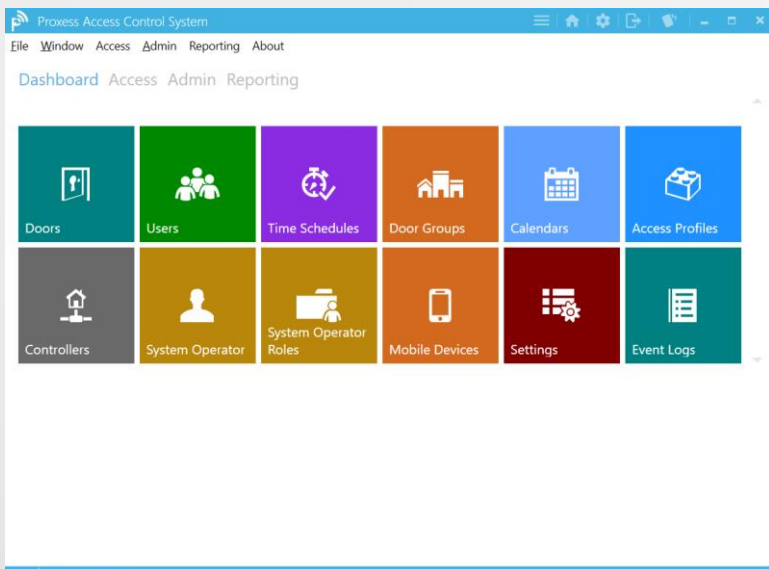
Click on the "Window" button, highlight "Theme" and then click on "Light".



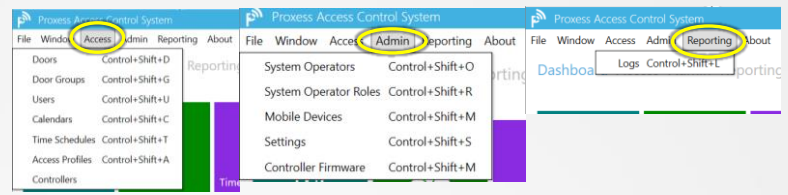
From anywhere within the ProxessIQ program, the above **Hot-Key** shortcuts may be used to jump into that menu.



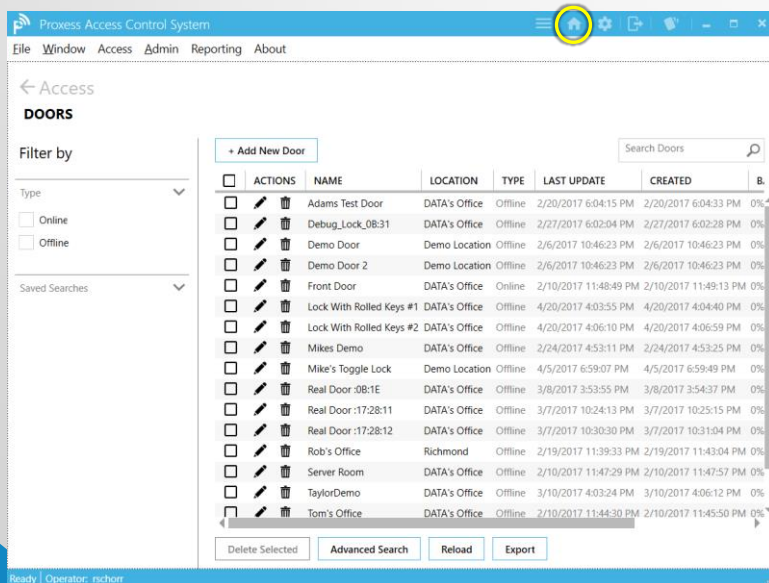
# User Interface Flexibility - 3



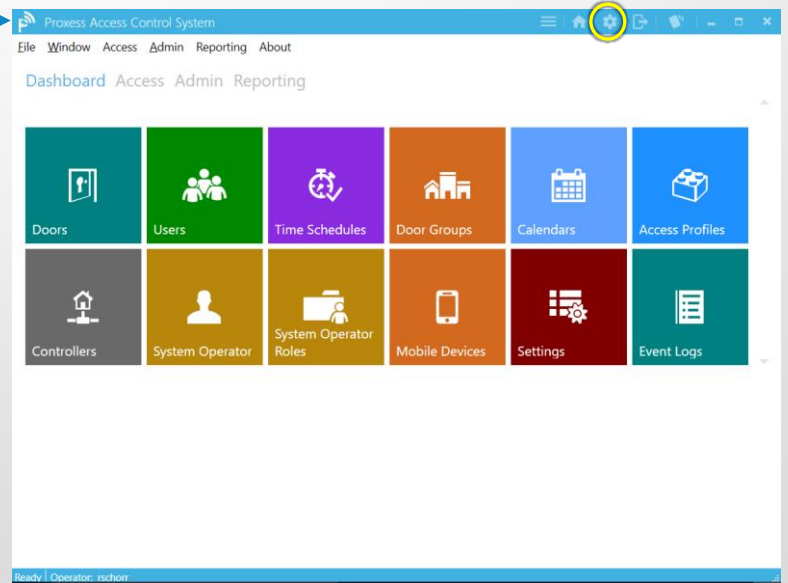
The screen background is now changed to white and will remain so throughout the system until the background is changed back to "Dark".



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.



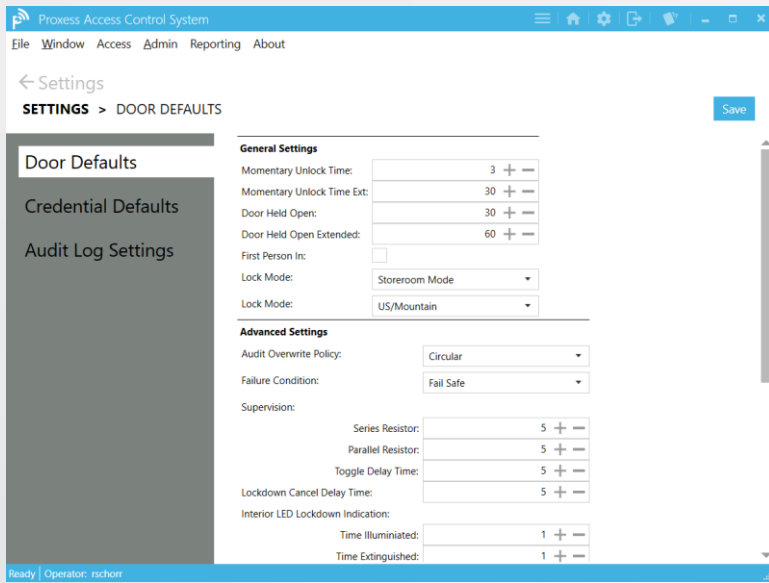
The Home icon is used from any screen in the system to bring you back to the Dashboard \ Home Screen.



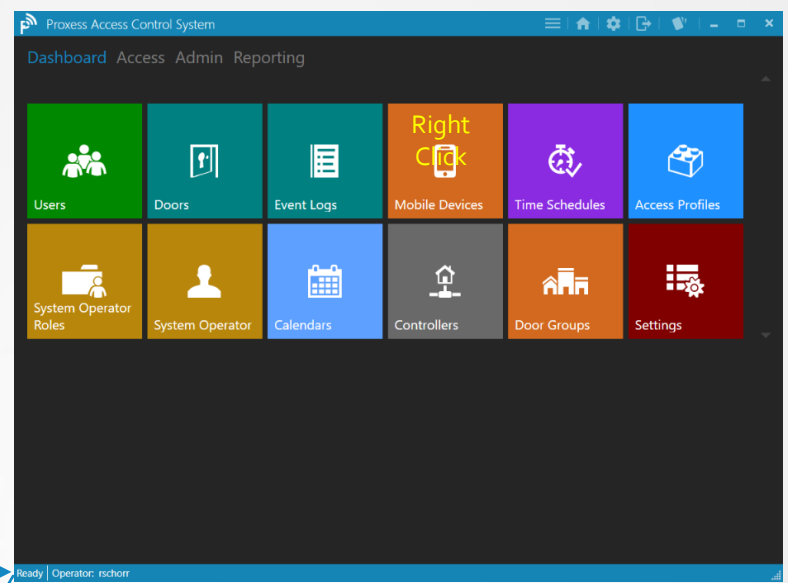
From any screen in the system, you can shortcut to the "Settings" module with a click on the icon shown in the top taskbar.



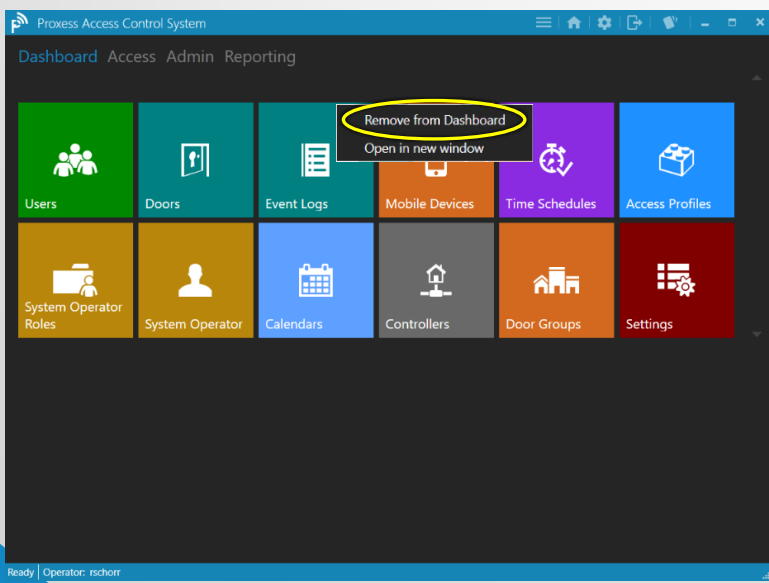
User Interface Flexibility - 4



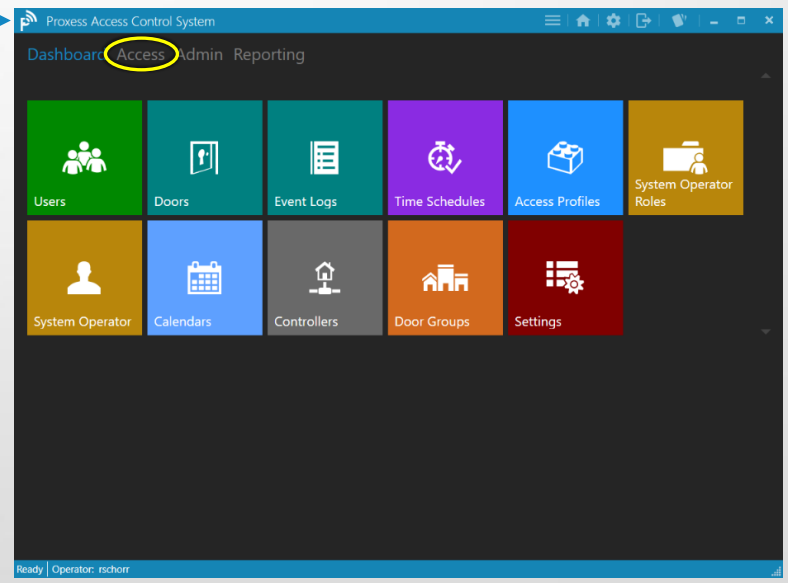
The "Settings" module opens. Now return to the Home Screen / Dashboard.



Right-click on a module icon.



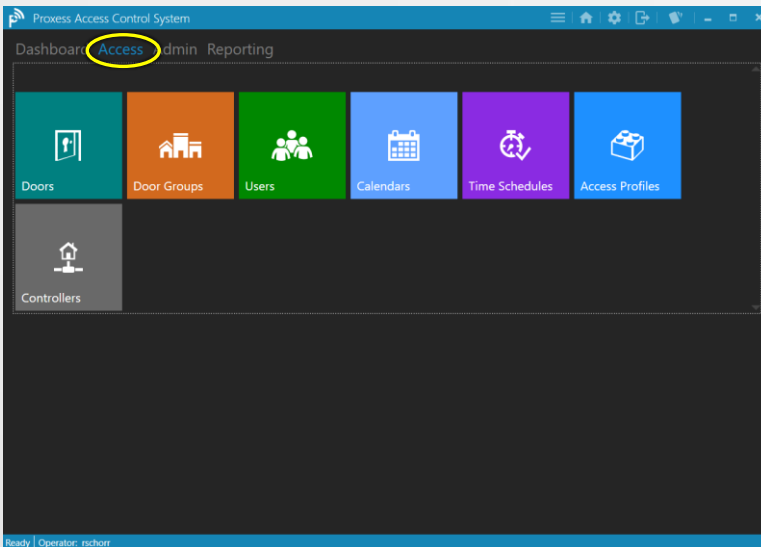
You may "Remove" the icon from the Dashboard or open it in a new window (Is this working right?).



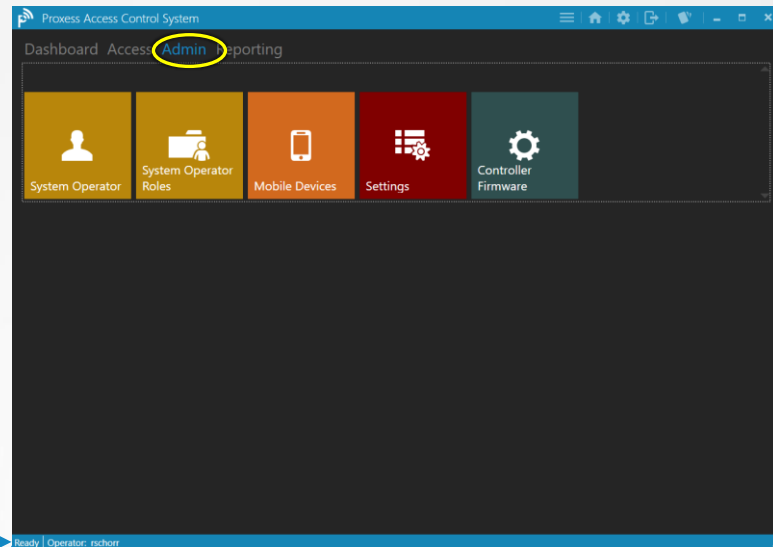
Click on "Access" in the top menu.



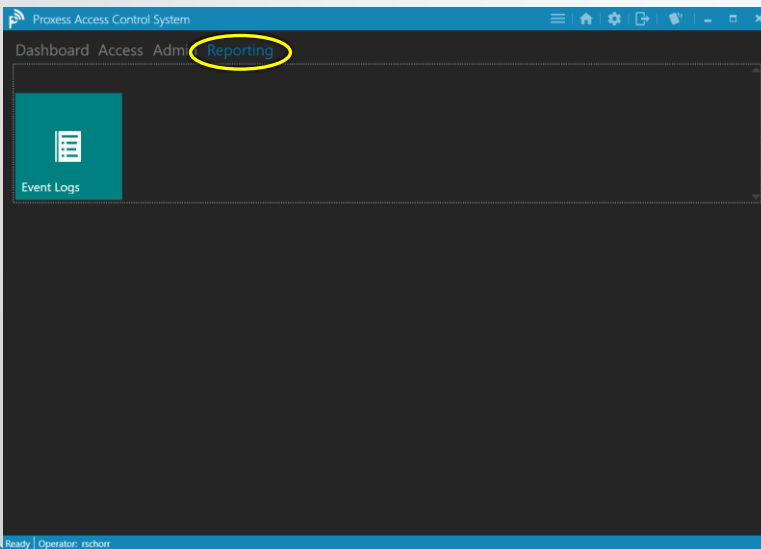
User Interface Flexibility - 5



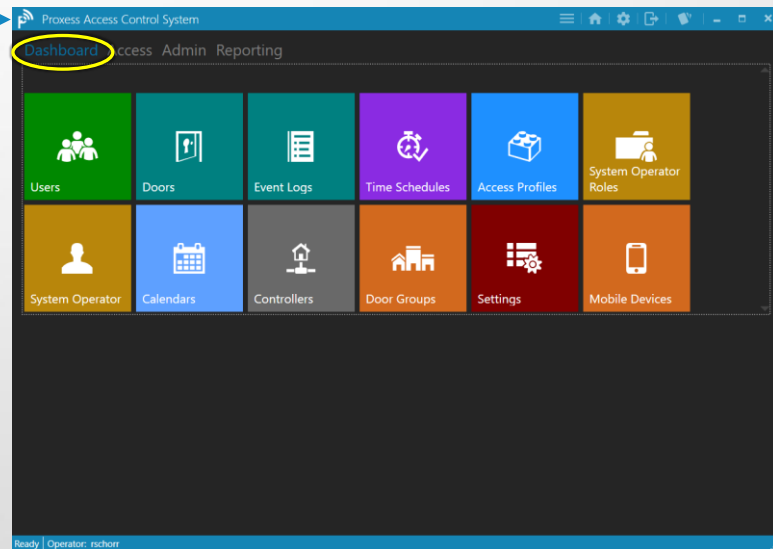
These are the module icons that appear when you click on "Access".



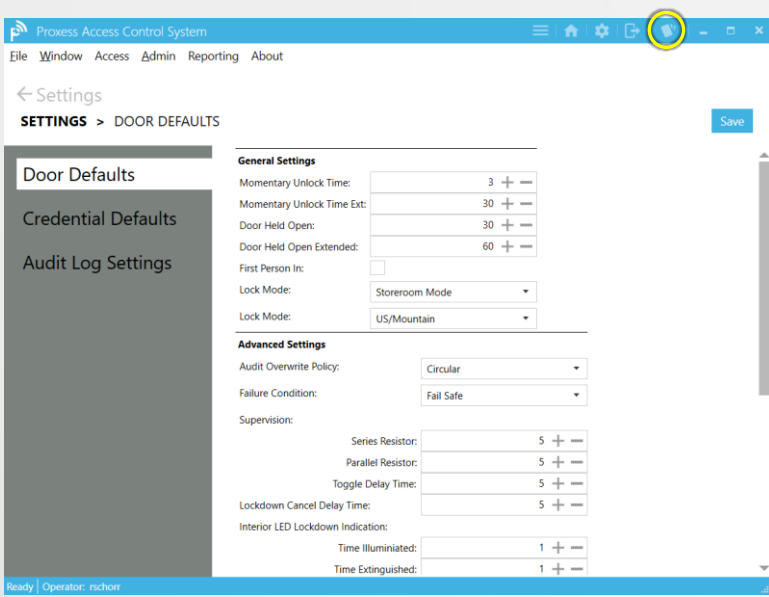
These are the module icons that appear when you click on "Admin".



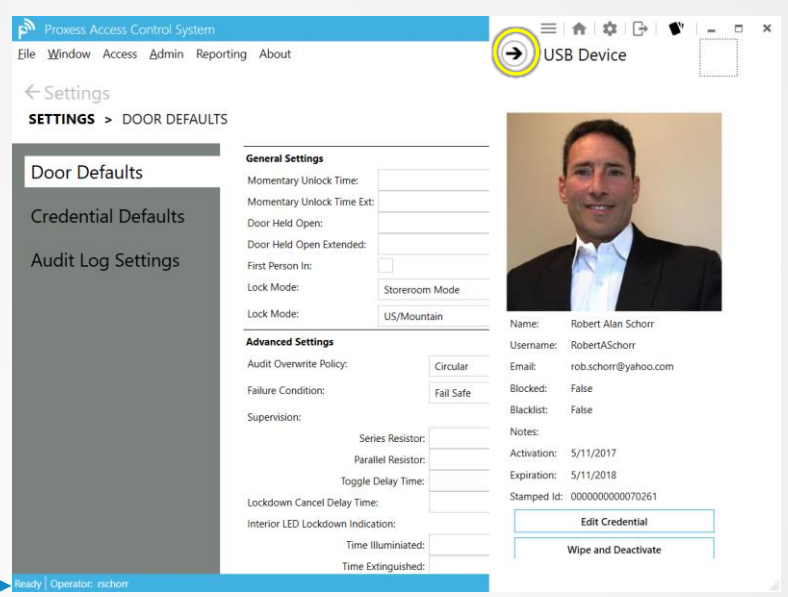
These are the module icons that appear when you click on "Reporting".



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



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



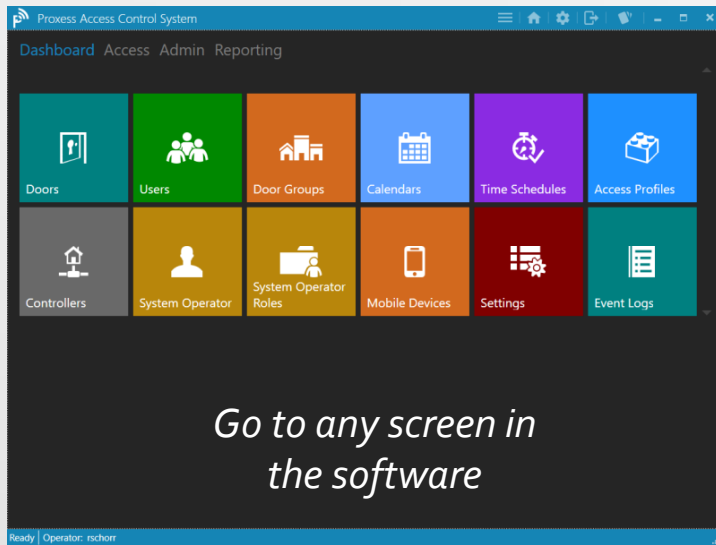
The most recent credential that was placed on the enrollment reader will pop-up.



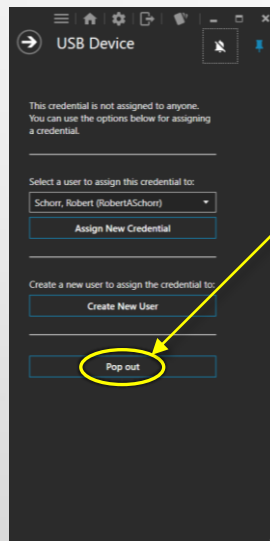
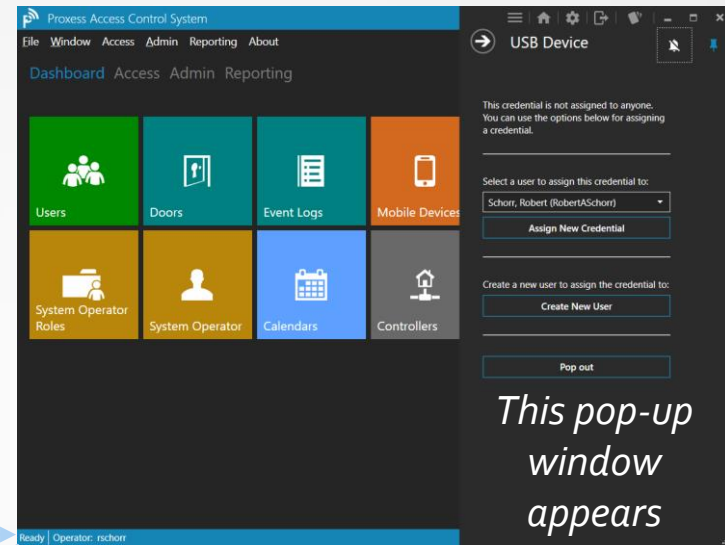
# USING the ENROLLMENT READER



# The Pop-up Window



Place a new card on the enrollment reader



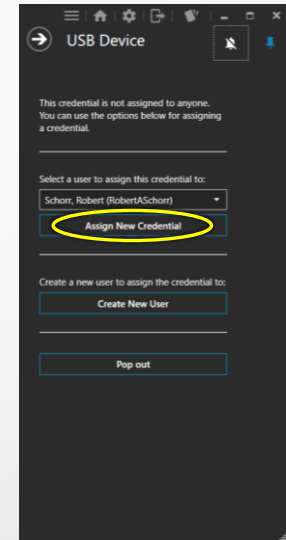
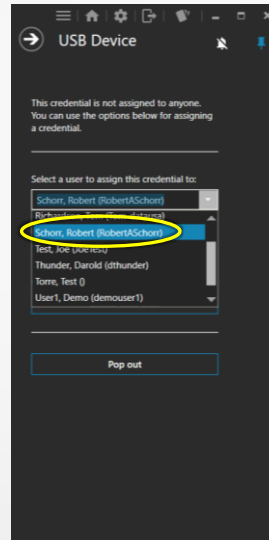
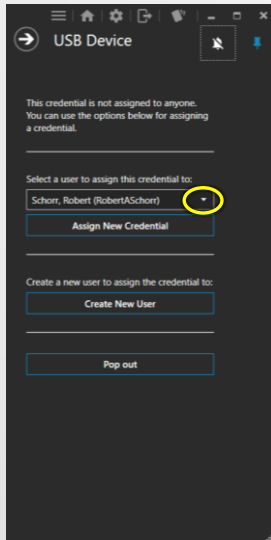
The pop-up window presents several options for the operator.

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



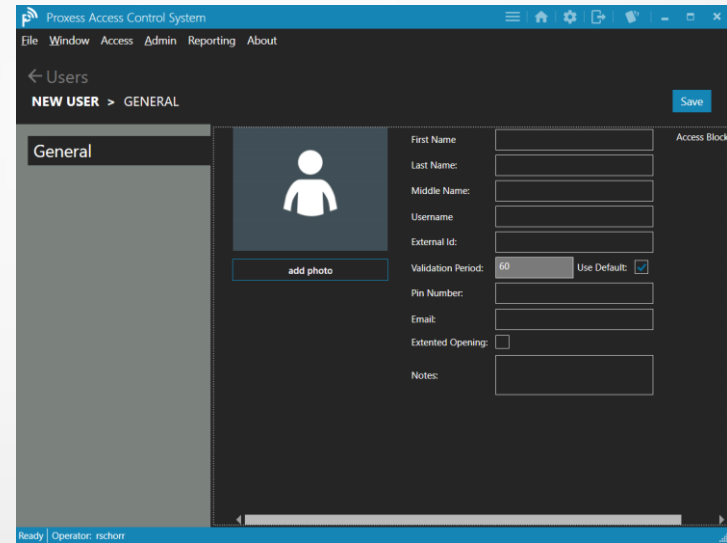
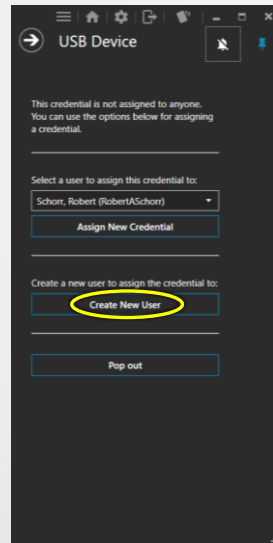
The Operator may assign the credential that is currently on the enrollment reader to an Existing User.

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

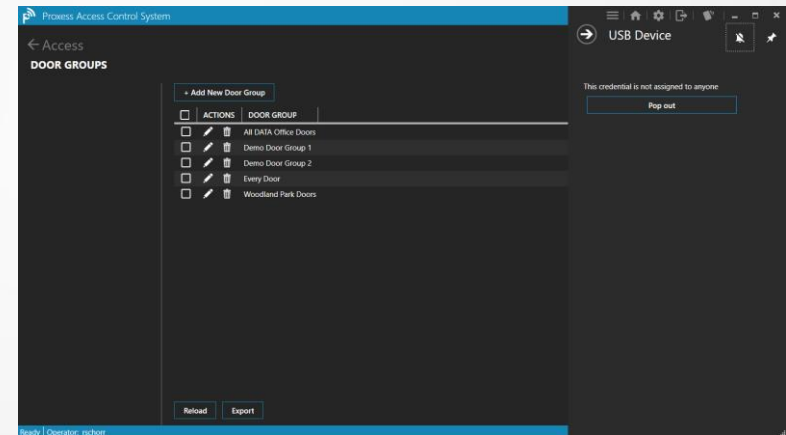
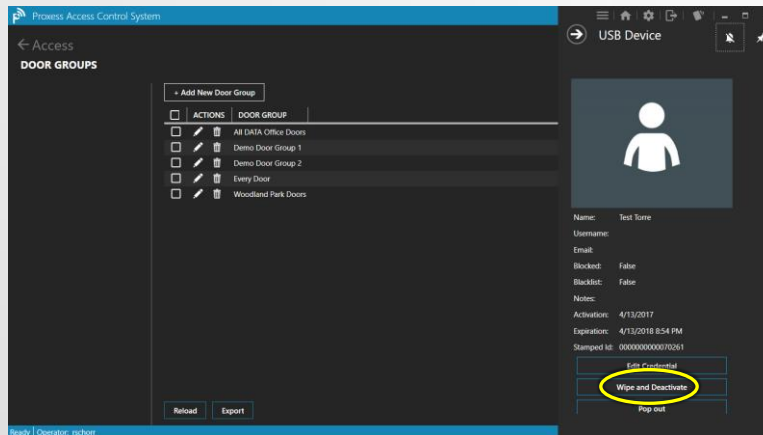


With the card on the enrollment reader, the Operator may create a New User record for it.

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 to (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.

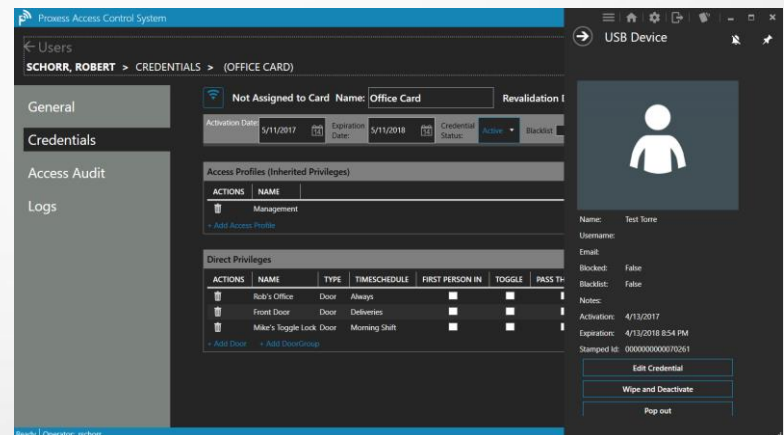
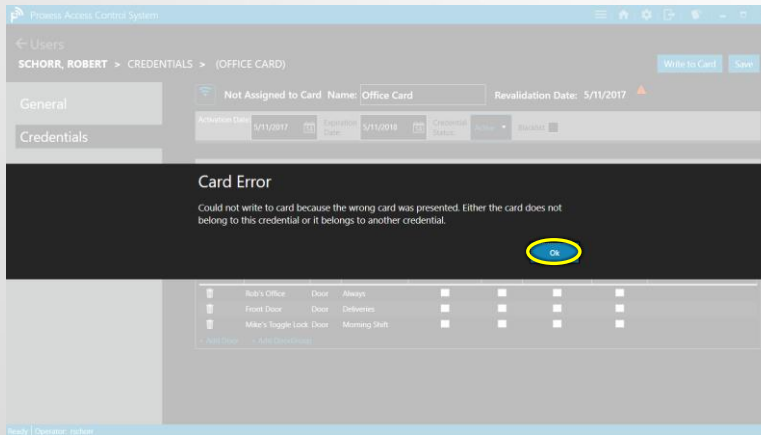
The operator may click "Edit Credential" to be brought to the edit screen for that user and may click "Pop out" to move the window freely on their desktop.

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.



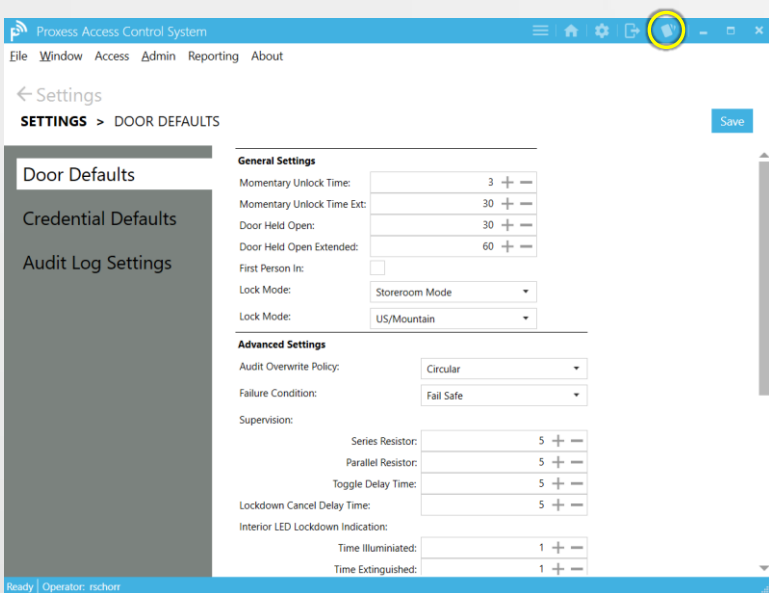
## Attempting to Enroll an Existing Card



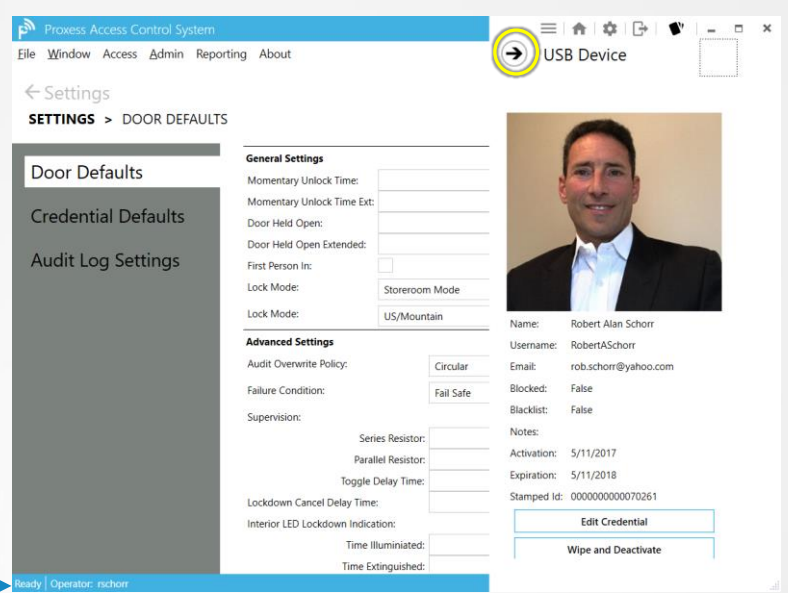
After a user has been added to the system, placing a credential on the enrollment reader and attempting to enroll or encode one that has already been programmed and assigned to someone else (from this system or any other system) will result in the above "Card Error" screen appearing.



# Using the Enrollment Reader - 6



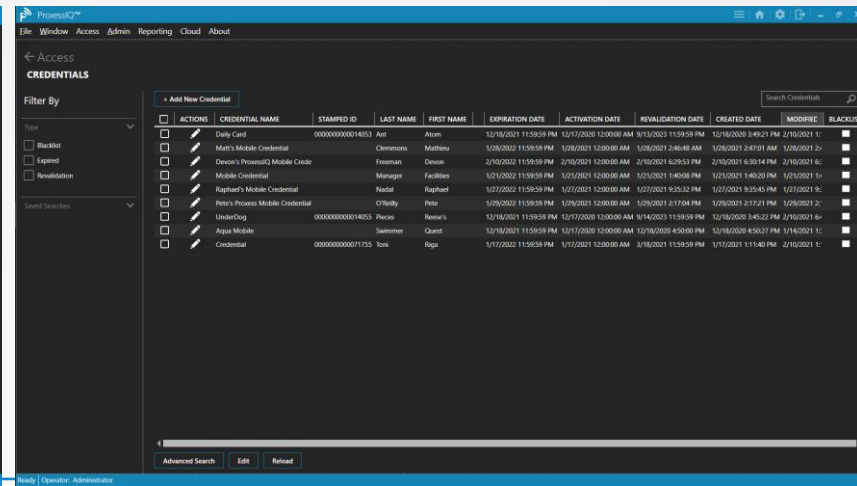
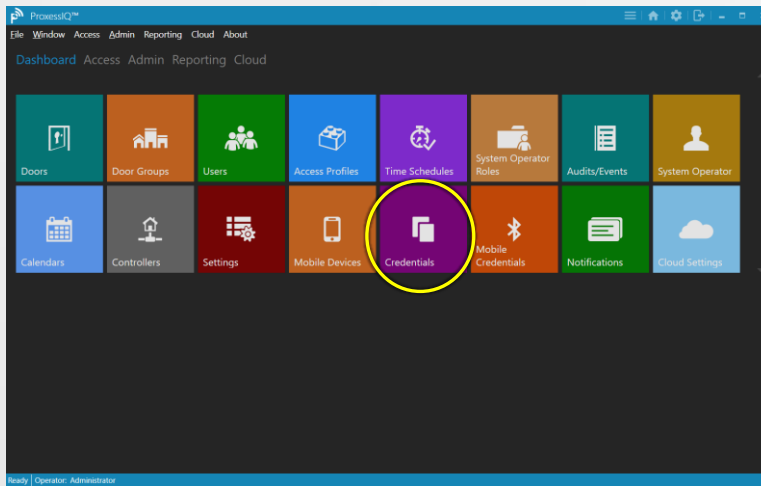
From any screen in the system, click on the icon shown in the top taskbar



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



# CREDENTIALS



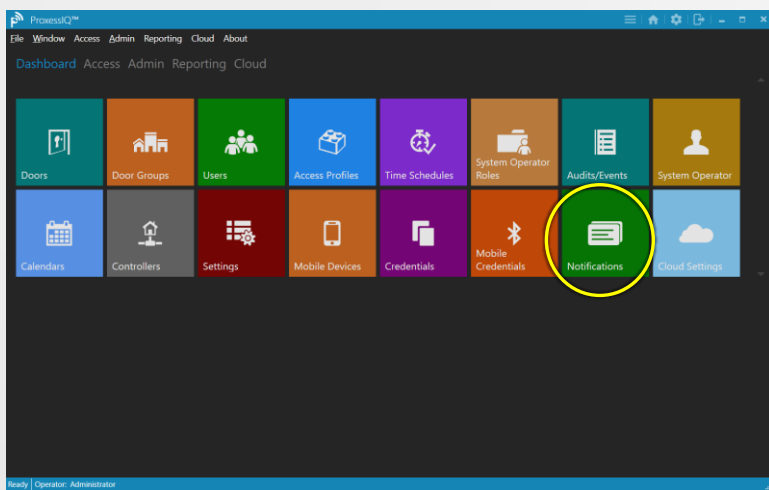
From the Home screen \ Dashboard, click "Credentials". A User must first be created/entered from the Users menu. Once a User has been created, Credentials may be created in either the Users or Credentials menus. The Credentials menu is a simpler management tool, as all of the credentials are in a single 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 ...

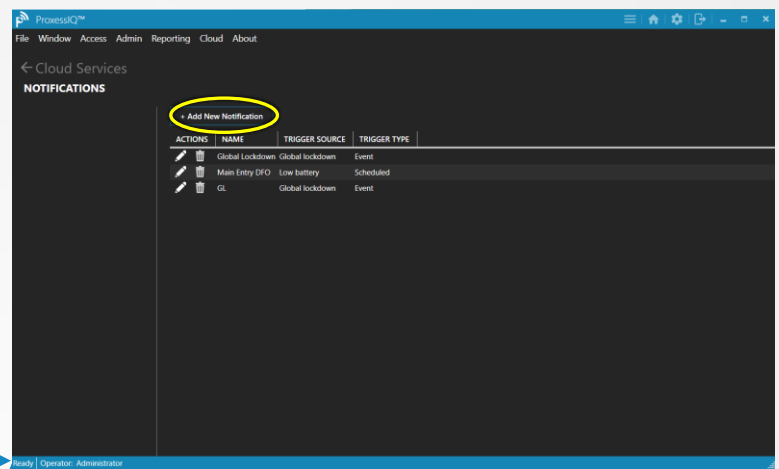




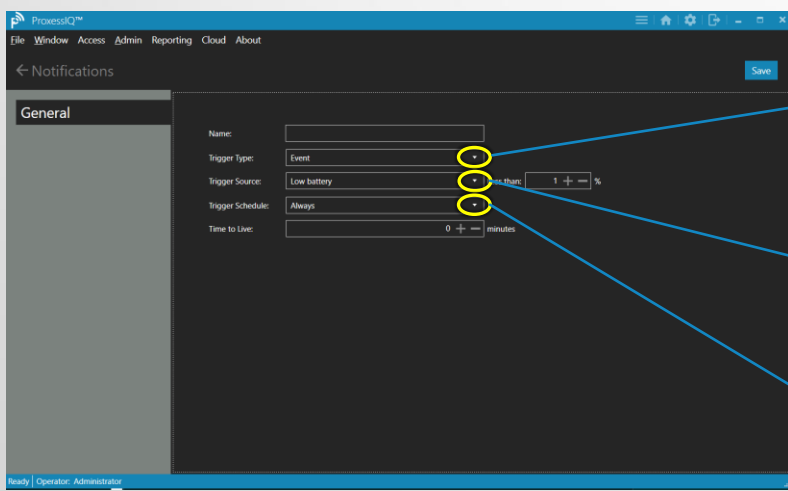
# NOTIFICATIONS



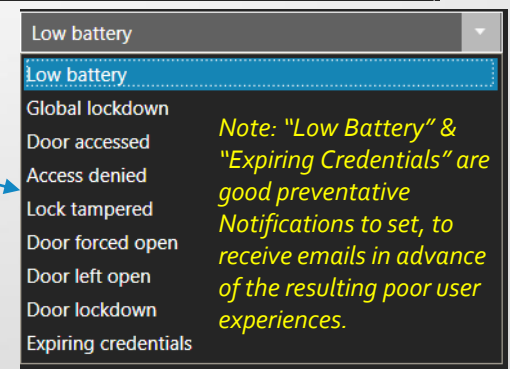
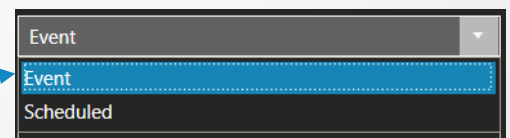
From the Home screen \ Dashboard, click "Notifications".



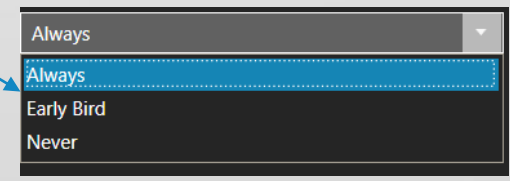
Your existing Notifications will be listed. Click "Add New Notification" to do so. You may click on the column titles (Name, Trigger Source and Trigger Name) to sort by them in alphabetical order. You may edit or delete any existing Notification by clicking on its Pencil/Edit icon on the left side.

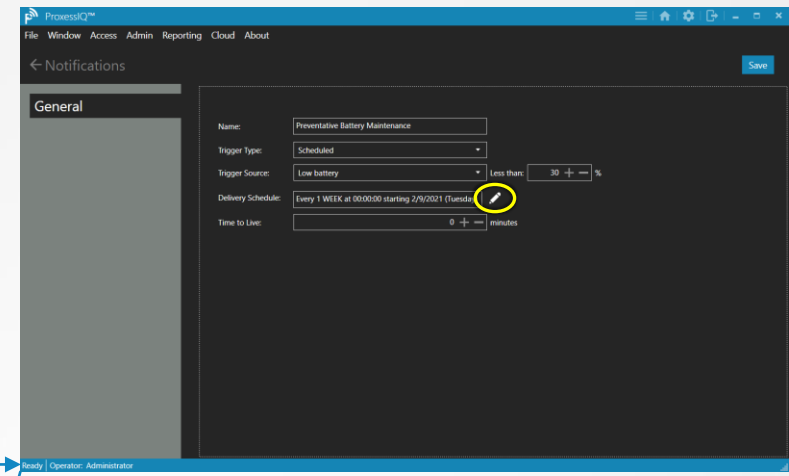
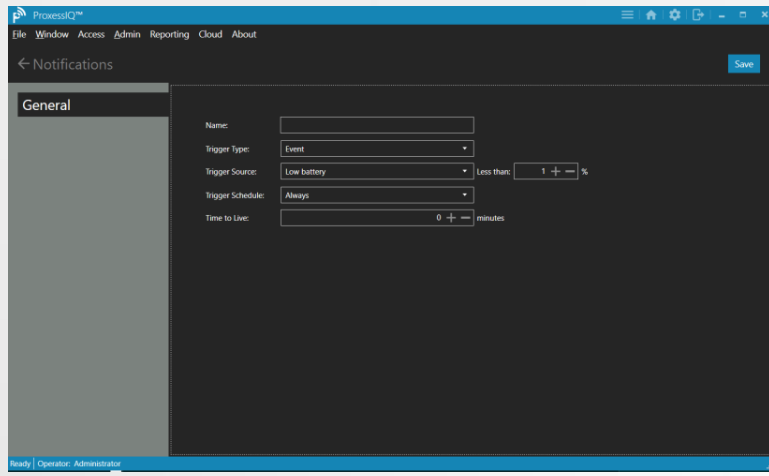


Enter the name for the new Notification. The "Trigger Type" for initiating a Notification is either an instantaneous Event, or one that is Scheduled. The "Trigger Source" list is shown on the right. "Trigger Schedule" is provided to allow different people to receive emails at different times and days. "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.



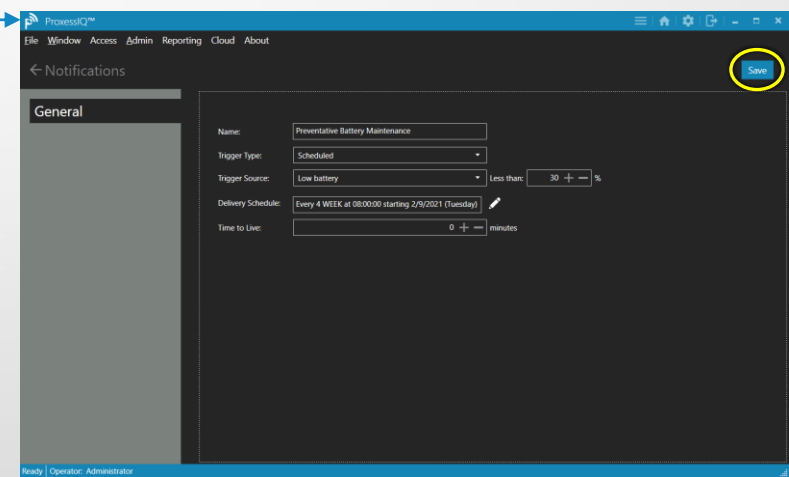
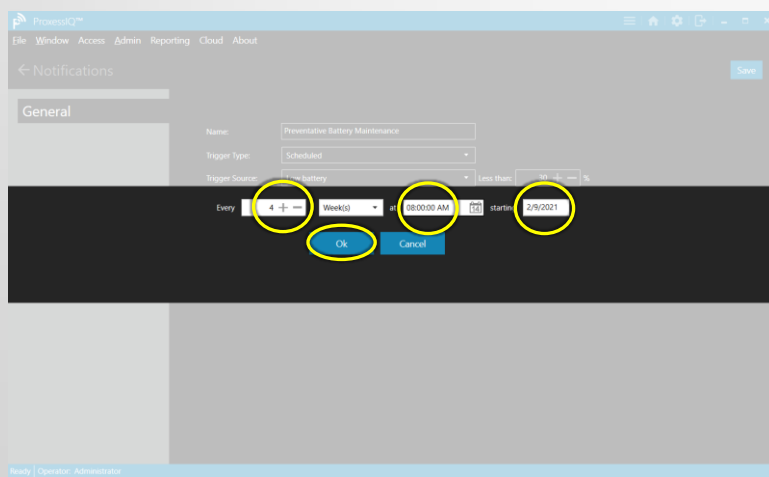
*Note: "Low Battery" & "Expiring Credentials" are good preventative Notifications to set, to receive emails in advance of the resulting poor user experiences.*





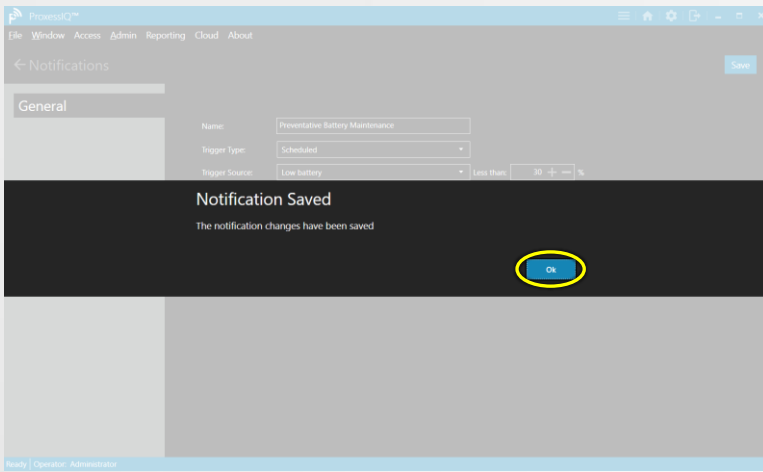
Note: In the following example we will create a Scheduled Notification. For Notifications with the "Trigger Type" selected as an "Event", individual Users/Recipients may be added to be emailed either always, or just for specific days of the week and times of the day.

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.

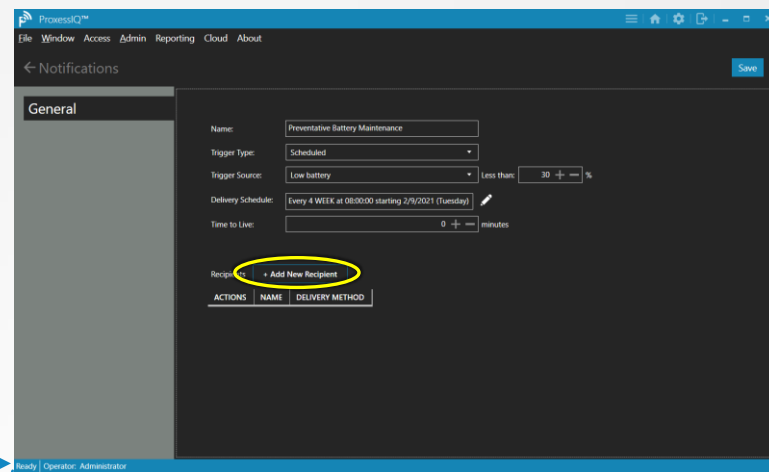


Let's have this email sent out every 4 weeks (click the + & - to change), at 8AM (click there to change), beginning on the date of your choice (click there to change). Click "OK".

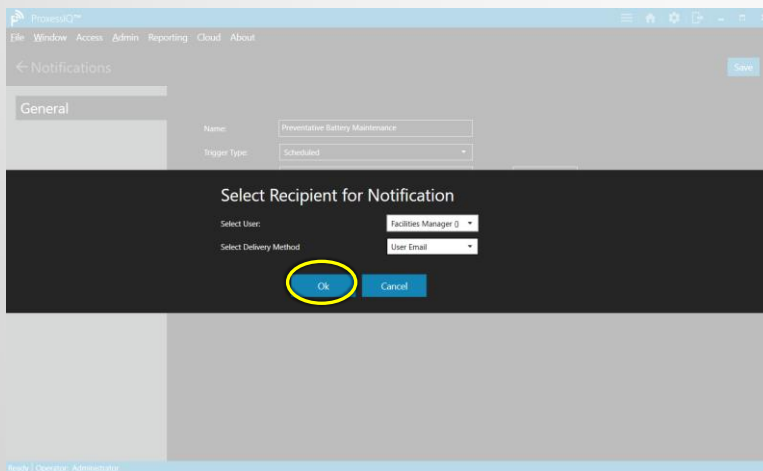
Click on "Save".



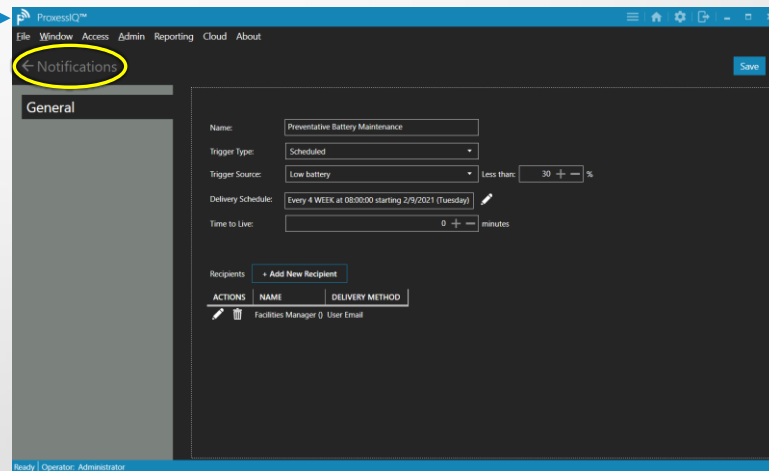
This shows the new Notification has been saved. Click "OK".



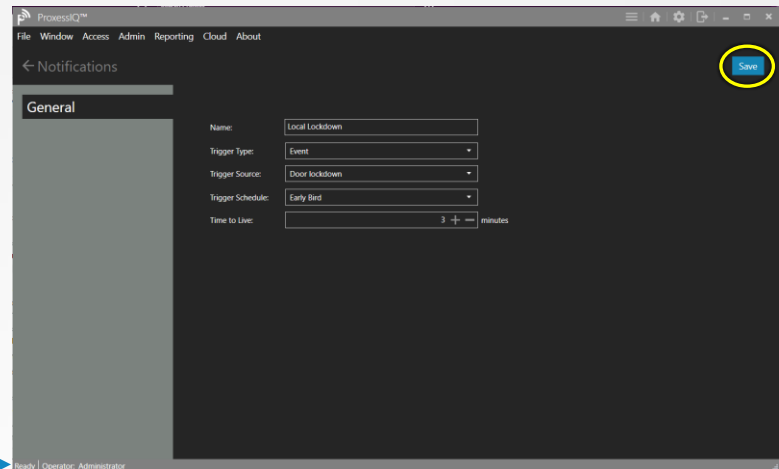
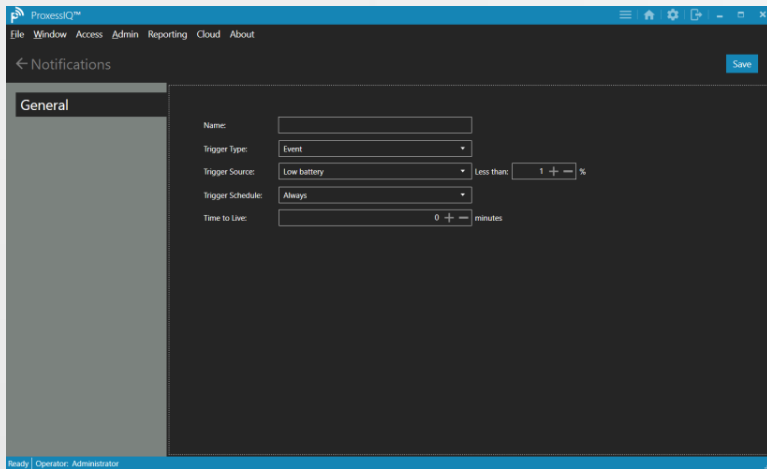
To select someone to receive an email for this Notification (either on a schedule or as it is received in the software), Click "Add a New Recipient".



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".

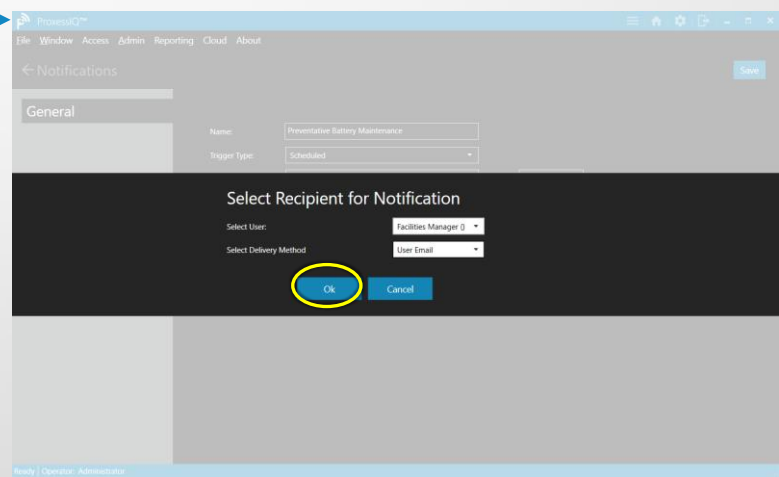
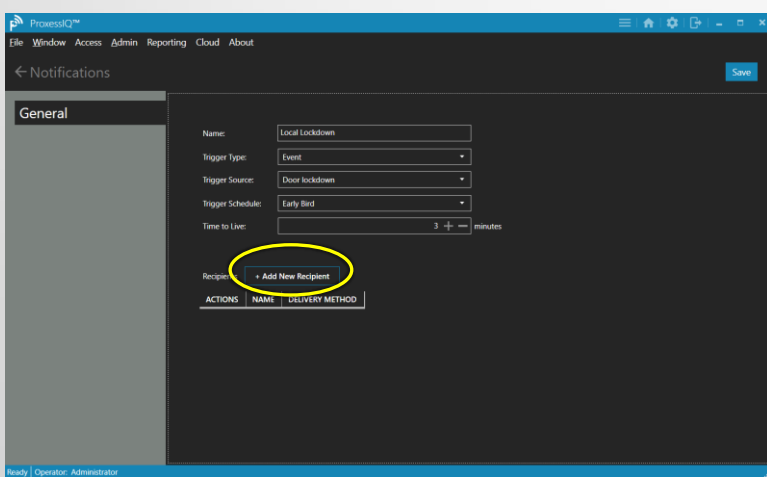


The recipient now appears in the list for this Notification. You may return to the Notifications menu by clicking "← Notifications".



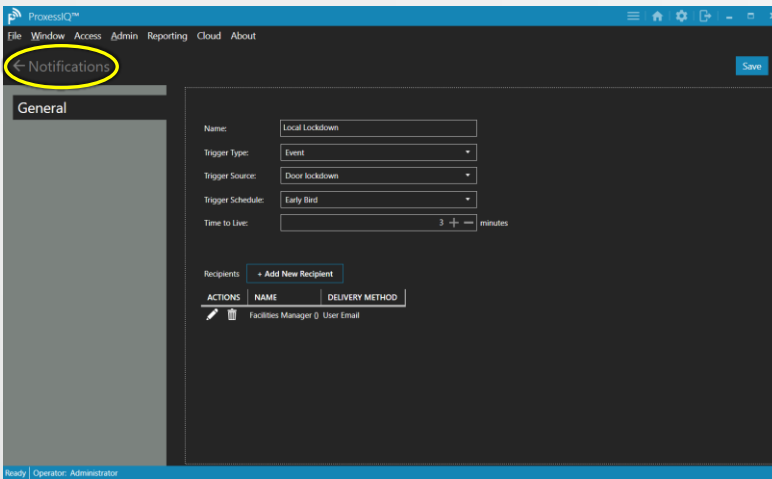
Note: In the following example we will create an Event based Notification. The primary difference from a Scheduled Notification is this: With an Event based Notification, individual Users/Recipients may be added to be emailed either always, or just for specific days of the week and times of the day.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





# SETTINGS



The screenshot shows the 'Settings' window with the 'DOOR DEFAULTS' tab selected. The 'Door Defaults' tab is circled in yellow. The interface includes a 'Save' button in the top right. The settings are organized into sections: 'General Settings' with fields for Momentary Unlock Time (3), Momentary Unlock Time Ext. (30), Door Held Open (30), and Door Held Open Extended (60); 'Advanced Settings' with dropdowns for Lock Mode (Storeroom Mode), Audit Overwrite Policy (Circular), and Failure Condition (Fail Safe); and 'Supervision' with fields for Series Resistor (5), Parallel Resistor (5), Toggle Delay Time (5), and Lockdown Cancel Delay Time (5). There are also checkboxes for 'First Person In', 'Egress Cancels Lockdown', and 'Pass-Through Cancels Lockdown'. At the bottom, there are checkboxes for recording events: Record Valid Access Attempts, Record Invalid Access Attempts, Record Contact Points, Record Lock Events, and Record Communications.

The screenshot shows the 'Settings' window with the 'AUDIT LOG SETTINGS' tab selected. The 'Audit Log Settings' tab is circled in yellow. The interface includes a 'Save' button in the top right. The settings are organized into sections: 'Door/Lock Audit Events' with a 'Valid Access Events' list (Access, Entry, Exit, Access Under Duress, Entry Under Duress, Access Under Lockdown, Exit Under Lockdown, Access Under Duress During Lockdown, Entry Under Duress During Lockdown, Double Swipe Reader Toggle Unlock, Double Swipe Reader Toggle Cancel, Mechanical Key Access, Lockdown Initiated, Lockdown Canceled) and an 'Invalid Access Events' list (Repeated Invalid Attempts, Card Format Not Supported, Invalid System ID, Credential Not On Lock Permissions Table, 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); 'Lock Events' with checkboxes for Batteries Replaced, Power On Reset, Factory Default Reset, Lock Parameters Programmable Via BLE, Lock Database Programmable Via BLE, Lock Program Code Flashed, Low Battery Warning, Critical Battery Warning, Battery Failure Fail As Is, Battery Failure Fail Secure, Battery Failure Fail Safe, and Time Changed; 'Contact Point' with checkboxes for Tamper Secure, Rex Active, Rex Secure, Rex Fault Short, Rex Fault Open, Dod Active, Dod Fault Short, Dod Fault Open, Tamper Active, and Dod Secure; and 'Communications' with checkboxes for Communication Restored To Reader, Communication Lost To Proxess Host, Communication Restored To Proxess Host, and Communication Lost To Reader.

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).

The screenshot shows the 'Settings' window with the 'CREDENTIAL DEFAULTS' tab selected. The 'Credential Defaults' tab is circled in yellow. The interface includes a 'Save' button in the top right. The settings are organized into sections: 'General Settings' with a 'Validation Period (days)' field set to 60.