



# SOFTWARE MANUAL

ProxessIQ™ Software & Proxess Sync™ Mobile App Configuration

# Equipment & Network Needs

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

Here are the Computer & other required system components:

- **Minimum Computer Spec** (for each ProxessIQ™ server and client), Windows 10+ Pro, Intel 12<sup>th</sup> Gen 2GHz, 1 USB input, 8MB RAM, 256GB hard drive, 40GB free disk space.
- For **Larger Systems**; 12 Generation Intel Core i7, 16MB RAM, 512GB HD, .NET 4.8.
- *It is strongly recommended to pre-install Microsoft SQL Express 2022 on the Server PC prior to downloading the ProxessIQ™ software. Consult Proxess for very large systems.*
- Network or Internet connection for the PC, depending on the Proxess Sync™ connection method
- Common WiFi connection to ProxessIQ™, or mobile plan with connection to the ProxessIQ™ network
- ProxessIQ™ software Download link: [www.proxess.com/downloads](http://www.proxess.com/downloads)
- USB Enrollment Reader
- Apple or Android Smart Phone
- Proxess Sync™ Download link
- Router for DNS comms to controllers, or switches for static IP & WiFi comms
- USB-to-Serial cable for custom controller configuration

**Ports** to be opened for client and IP controller communications:

- TCP 8008-8011 (client-to-server software comms), TCP 8031 (controller comms to the software) & UDP 8032 (controller beaconing)
- Note: The IP Controllers/Gateways may be configured to communicate over ethernet and/or WiFi

**Website URLs** to be **white-listed**:

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

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

- [DoNotReply@email.Proxess.com](mailto:DoNotReply@email.Proxess.com)

# Firewall Settings

Please prepare/enable your firewall to accept the following.

This is a summary of the firewall rules that the Proxess software installer attempts to create:

```
<fire:FirewallException Id="ProxessControllerCommunication"
  Name="Proxess Controller Communication"
  Protocol="tcp"
  Port="8031"
  Scope="any"
  IgnoreFailure="yes"
  Profile="all" />
<fire:FirewallException Id="ProxessControllerBeacon"
  Name="Proxess Controller Beacon"
  Protocol="udp"
  Port="8032"
  Scope="localSubnet"
  IgnoreFailure="yes"
  Profile="all" />
<fire:FirewallException Id="ProxessServerSecureCommunication"
  Name="Proxess Server Secure Communication"
  Protocol="tcp"
  Port="8009"
  Scope="any"
  IgnoreFailure="yes"
  Profile="all" />
<fire:FirewallException Id="ProxessServerOpenCommunication"
  Name="Proxess Server Open Communication"
  Protocol="tcp"
  Port="8011"
  Scope="any"
  IgnoreFailure="yes"
  Profile="all" />
<fire:FirewallException Id="ProxessIdentityServer"
  Name="Proxess Identity Server"
  Protocol="tcp"
  Port="8008"
  Scope="any"
  IgnoreFailure="yes"
  Profile="all" />
```

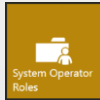
# Quick Start Guide (Page 1 of 2)



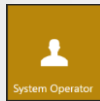
- **Software Installation:** Instructions for downloading and installing the ProxessIQ™ software; both server & clients.



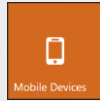
- **Licensing:** Add and upgrade licenses for ProxessIQ software and Mobile Credentials/Keys.



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



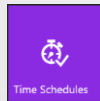
- **System Operators:** Add operators into an Operator Role. Modify\personalize their role.



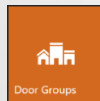
- **Mobile Devices:** Add mobile phones which will operate the Proxess Sync simple configuration App.



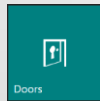
- **IQ Mobile / Proxess Sync™:** Sign in and enable the Proxess Sync™ simple configuration App on your Apple or Android Mobile Phone.



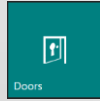
- **Time Schedules:** Create the days and times that locks and doors will operate with credentials and remain locked or unlocked.



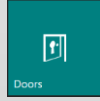
- **Door Groups:** Create groups of Doors, for more easily assigning access rights to users.



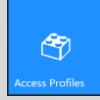
- **Doors:** *Adding, programming & editing* wireless locks and online doors.



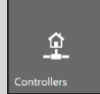
- **Doors & Door Groups:** *Mass-Adding\Modifying\Deleting* Doors & Door Groups using a .csv spreadsheet



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



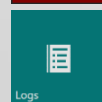
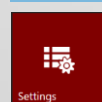
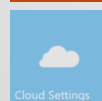
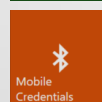
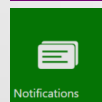
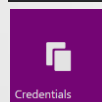
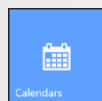
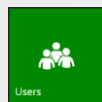
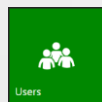
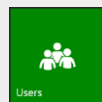
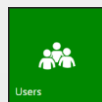
- **Access Profiles:** Create groupings combining Time Schedules with Doors and Door Groups.



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



# Quick Start Guide (Page 2 of 2)



- **Users:** Add\Modify\Delete credential holders and their **PHYSICAL** credentials (cards, keychain fobs, stickers, watches), including custom Advanced Searches.
- **Users:** Add\Modify\Delete credential holders and their **MOBILE** credentials (Apple & Android phones).
- **Users:** Mass-Adding\Modifying\Deleting Users & Credential using a .csv spreadsheet
- **Encoding & Deleting:** Using the **ProxessIQ Software** to Encode & Delete credentials
- **Encoding & Deleting:** Using the **Proxess Sync** phone app to Encode & Delete credentials
- **Calendars:** Schedule Holidays and special events, years in advance.
- **Credentials:** Simpler management utility for credentials, after a User is created in Users menu, including custom Advanced Searches
- **Notifications:** Set Email alerts based on virtually any system event.
- **Mobile Credentials:** Administrative management of Mobile Credentials (Issuance typically occurs in the Users menu).
- **Cloud Settings:** Communications management between ProxessIQ server and the Mobile Credential Cloud.
- **Settings:** Define system and operational attributes, including for door, reader, LED and credential operations.
- **Logs:** All User & Door event logs are available here and may be searched using multiple custom Boolean rules, with custom Advanced Searches.
- **User Interface:** Arrange and hide Module icons and UI color schemes.



# SOFTWARE DOWNLOAD & INSTALLATION

# Which software do I download for a Basic system?

From the links provided at [www.Proxess.com/Downloads](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 configuration and data entry. OR

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

## PC SPEC (minimum):

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

Primary computer ("Server"):

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



Additional computers ("Clients"):

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





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

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

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

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



[www.Proxess.com/Downloads](http://www.Proxess.com/Downloads)

### Note on Upgrading Versions:

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

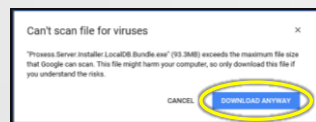
Note: 1.4 versions are for support of Legacy systems Only

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

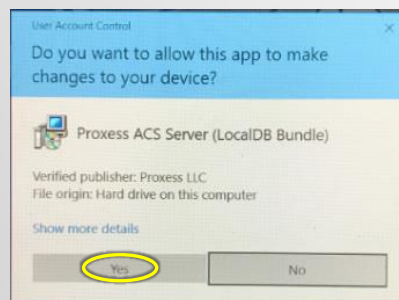
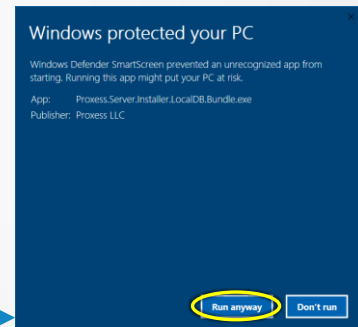
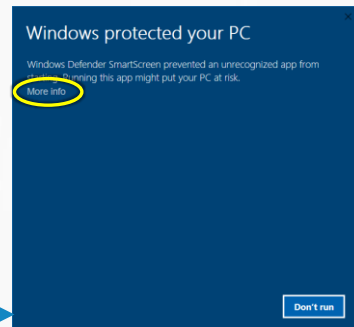
Per the previous page, click on “**Proxess-Server-Installer-LocalDB-Bundle.exe**” to begin the file download.

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

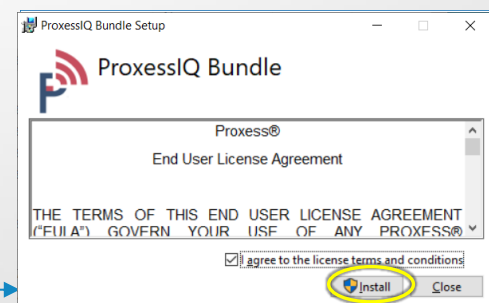
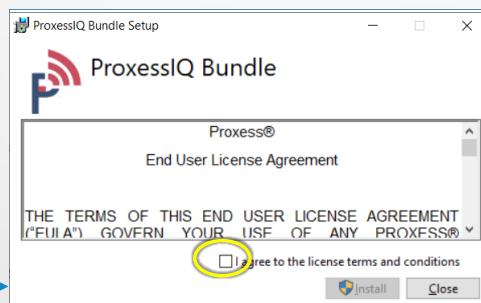
## This is the **Download Bundle** installation wizard:



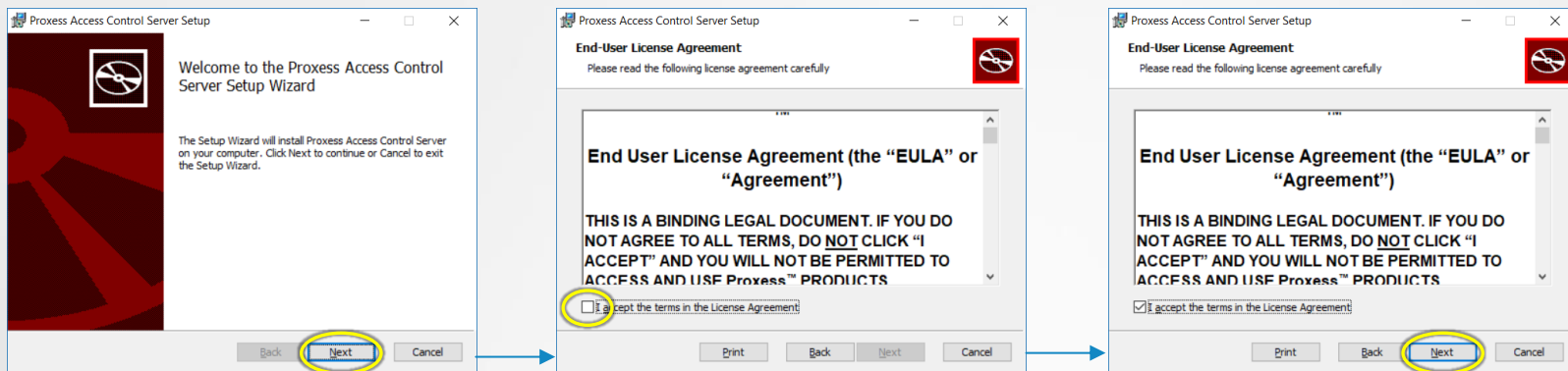
Follow the windows that open and prompts that appear on this page. Depending on your computer's settings, some of these windows may not appear and can be ignored.



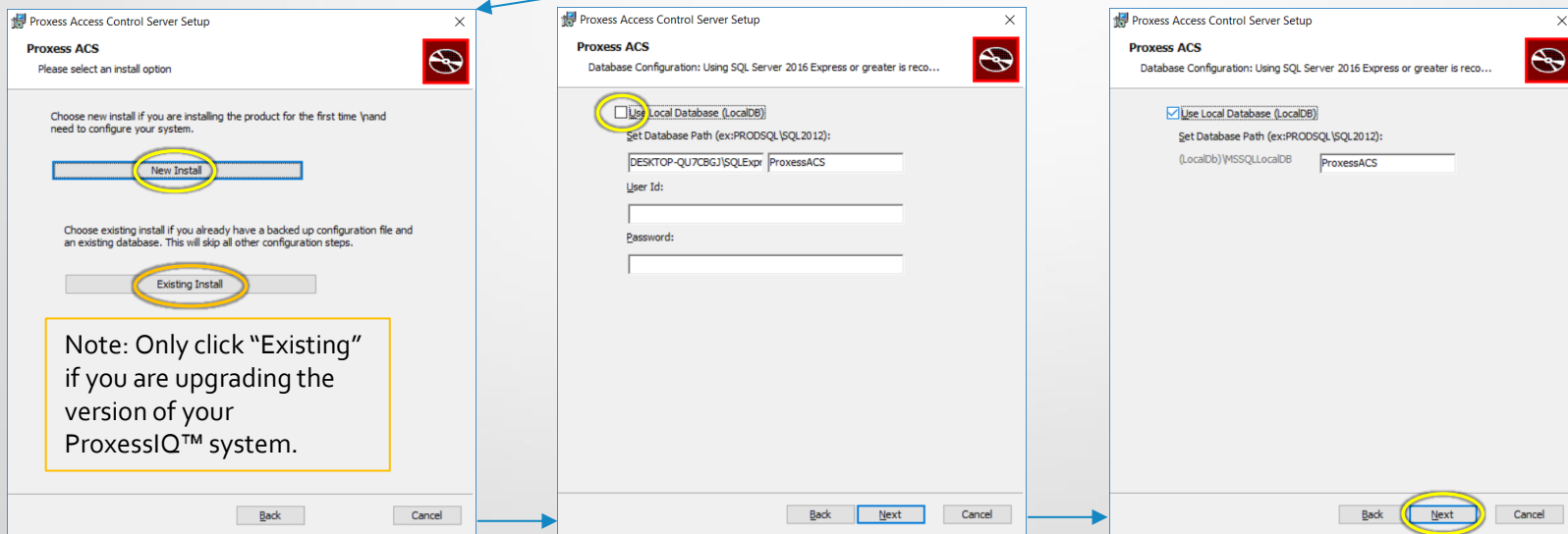
The icon below may blink in your computer's taskbar. If so, click on it to proceed.



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

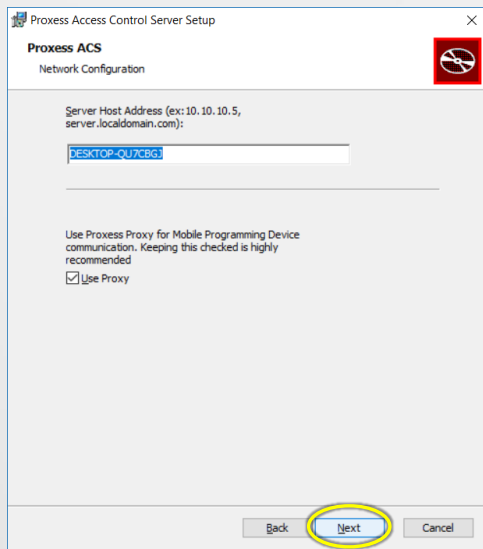


Continue following the windows that open and the prompts that appear on this page.

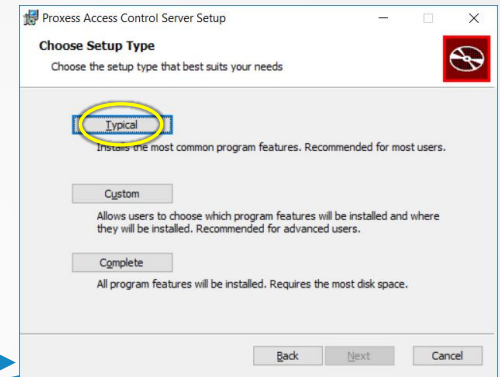
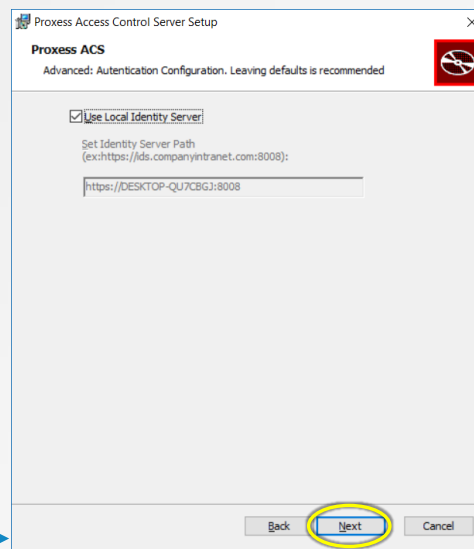


Click "New Install". Only click "Existing Install" if you are upgrading the current version of your system.

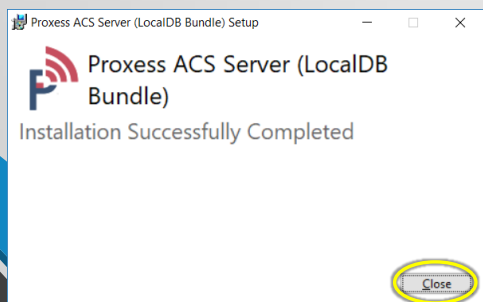
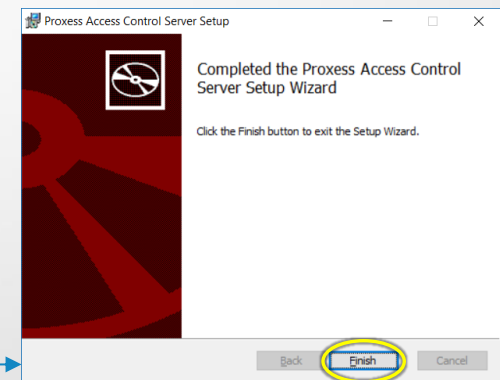
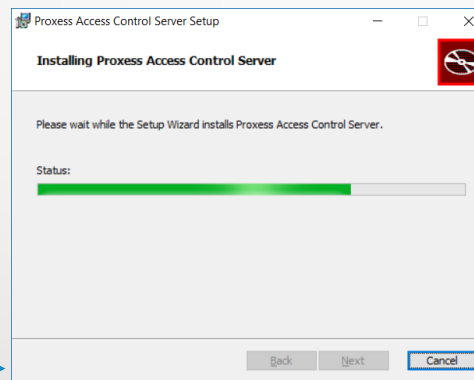
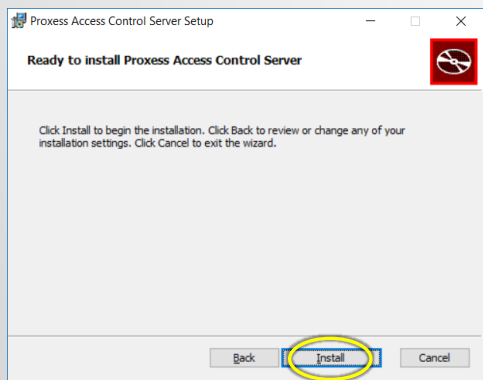
Check the box to Use LocalDB and do not change the path that appears. Only set a different path if you have already installed SQL Express and will take responsibility for its maintenance.



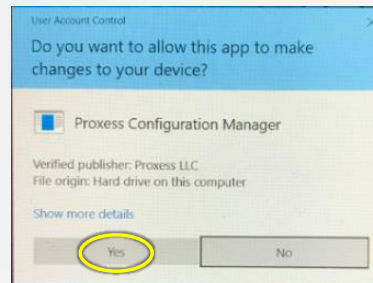
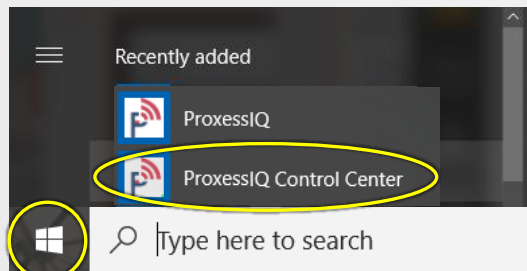
Do not change the default server address or name, unless you are prepared take responsibility for the resulting network connectivity. Leave "Use Proxy" checked.



Select "Typical", unless otherwise discussed with Proxess.



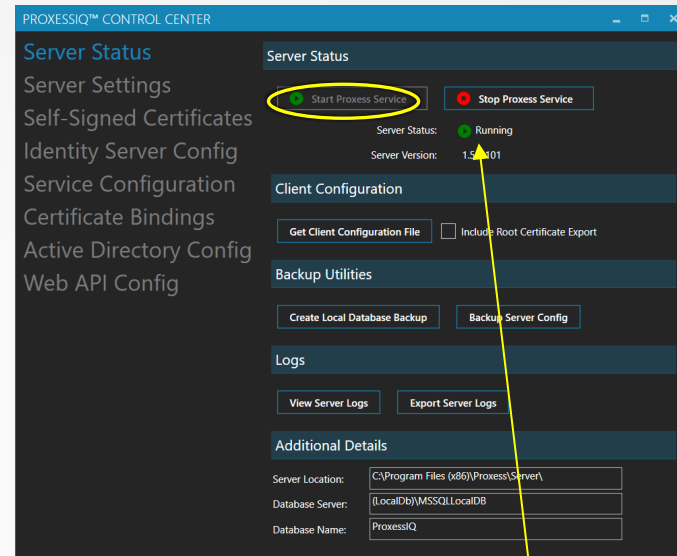
## Initializing the Server



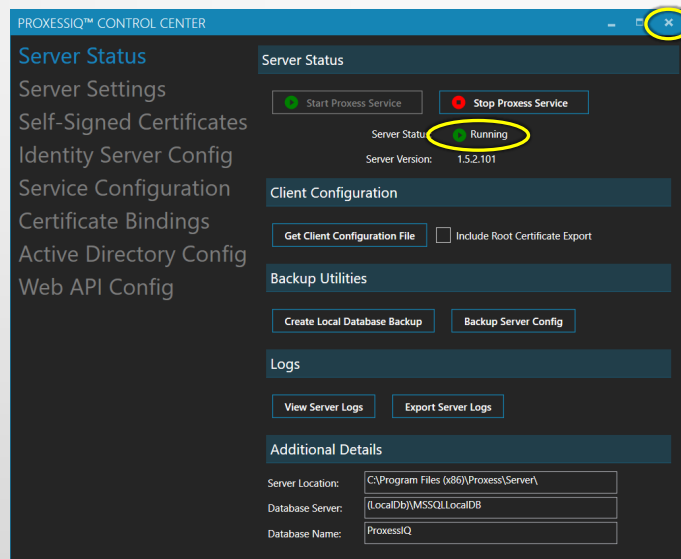
Both the "Server" and "Client" portions of the software have now been installed on your computer.

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

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

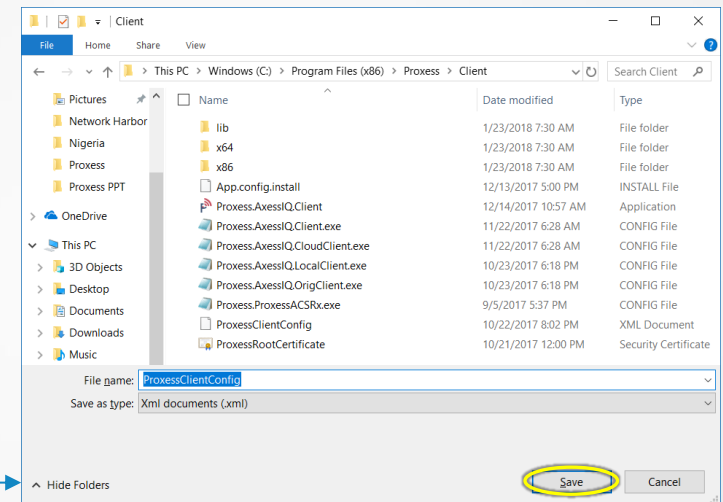
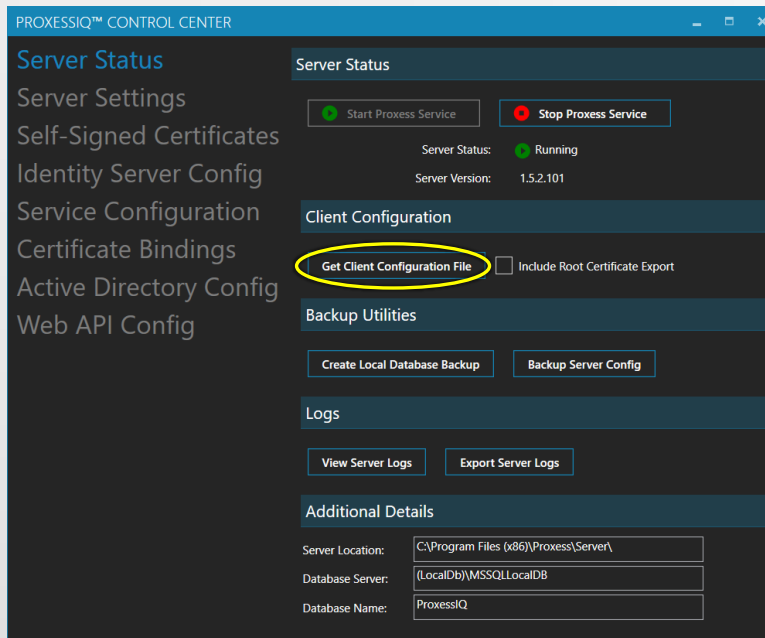


The above screen will open. If the Server Status is shown as "Stopped" then click on "Start Proxess Services".

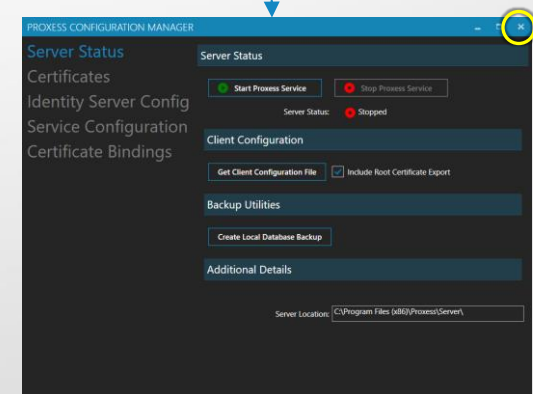


Usually within several seconds (and upwards of about a minute) after clicking "Start Proxess Services" the Server Status will change to "Running". We will now proceed to initiate the software.



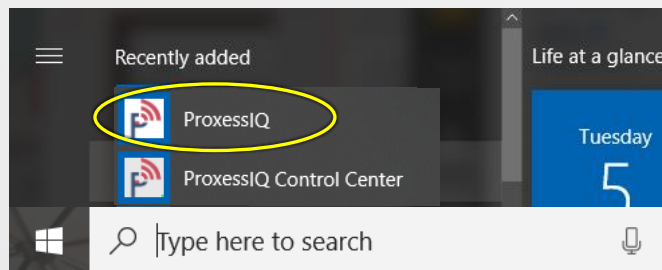


Click the "Get Client Configuration File" button.  
 On the "Save As" screen, navigate to the following (preferable) folder location to save the file in:  
 "This PC \ Windows (C) \ Program Files (x86) \ Proxess \ Client".  
 Click the "Save" button.  
 Click on the "x" on the top right of the ProxessIQ™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

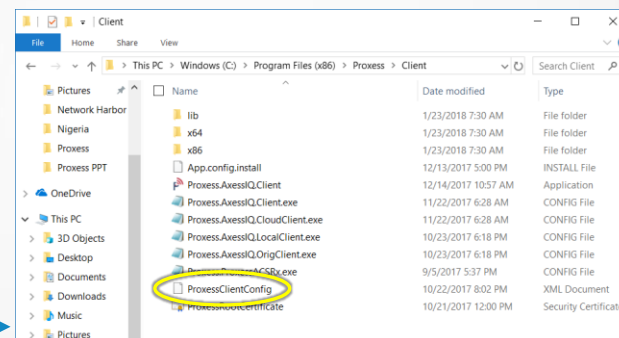
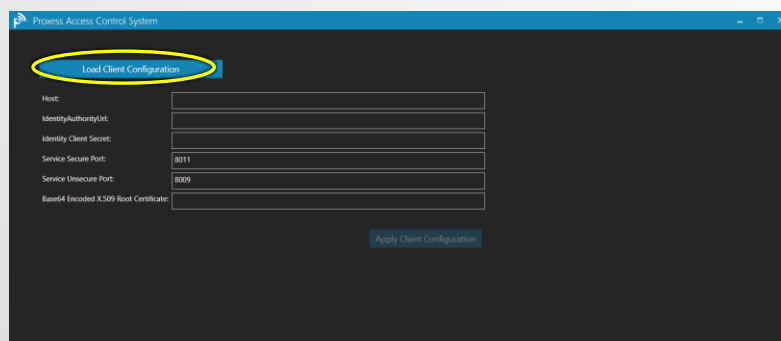
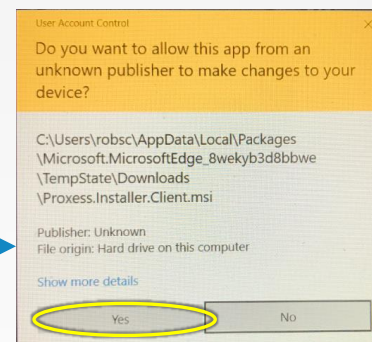


**Note:** It is important to keep the Proxess Services Running at all times and especially to enable it to automatically start-up upon a restart of the computer.

## Initializing the Client

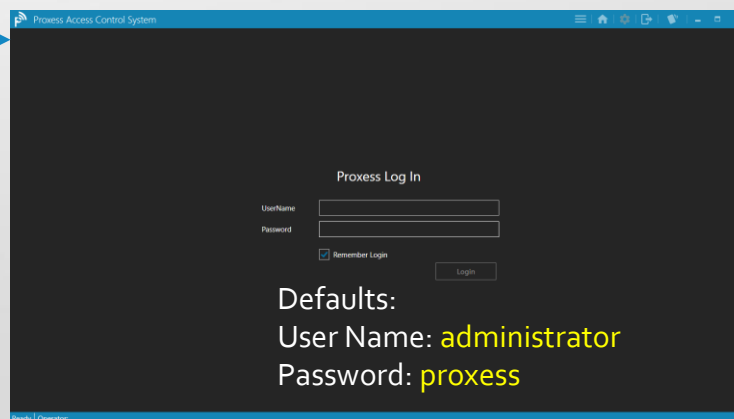
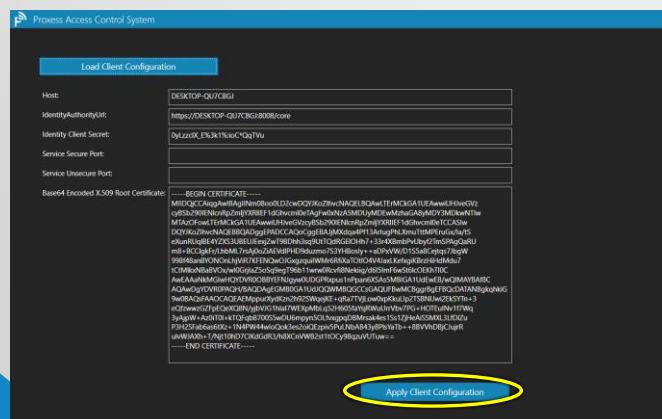


Click the "Windows" icon on your computer and select the "ProxessIQ" program and allow the app to make changes to your device.



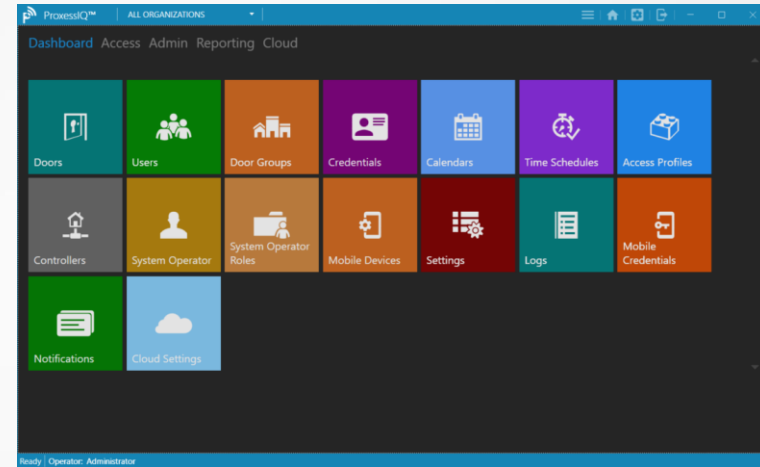
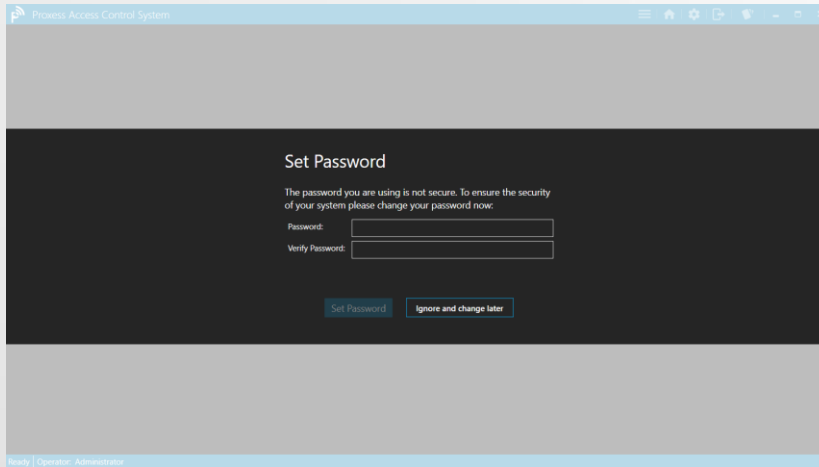
**NOTE:** Other than as stated here, do not make any changes to these screens. Click the "Load Client Configuration" button on the first screen. If you have not yet pasted it into the Client folder, you will be asked to search for the Configuration file, which may be found in the file folder you saved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

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



Defaults:  
User Name: **administrator**  
Password: **proxess**

You will now be prompted to change your password, which is strongly recommended, but not required. One option is to get familiar with the software and configure it and get a second administrator trained before changing the default password. Please do not take either of these options lightly and be certain to **SAVE YOUR PASSWORD !!** The ProxessIQ™ software will now open.



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

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

# Assuring Software Clients Connect to the Server

## Resolving Local Host Names

When using the computer name for a server's host name, any client trying to access the server will need to be able to resolve that host name. In a local network environment this happens automatically through either local DNS (typically in a domain environment) or through NetBIOS name resolution. If you are attempting to connect to the server's host name outside of your local network environment, these name resolution methods will not be available. The simplest approach for creating this mapping is to **create an entry for the host name in the local host file of the client computer that is attempting to reach the server.**

The Windows Host file is located at c:\Windows\System32\Drivers\etc\hosts. To make edits to this file, you will need to open the file with a simple text editor (like Notepad) with administrator privileges (Right-Click and select Run as administrator). The host file does not have an extension (.txt) so you will need to select "All Files (\*.\*)" in the file Open dialog. Once the host file is open, you will need to create a new line that contains the routable IP address followed by the computers host name. Assuming this is outside the internal network, this will need to be the public IP with proper routing/NAT rules setup. For example, if your public IP is "123.456.0.100" and your server's host name is "myservername", the host file entry should look like this:

```
123.456.0.1 myserversname
```

A robust alternative to this is to use a registered domain name with a public DNS record for your server's host name.

## NAT/Port Forwarding

To connect to a server inside a local network from outside of the local network, you will need to set up the appropriate NAT or Port Forwarding rules on your gateway /firewall. These rules need to provide a path from the public IP (provided by your ISP) to the internal network IP for all ports required for communication to the AxessIQ server. The default ports that are used for this communication are 8008, 8009, and 8011. Setting up NAT/Port Forwarding rules will be specific to your gateway manufacture. Please refer to the manufactures documentation for setting this up.

Example documentation for setting up port forwarding on a Comcast gateway can be found here:

<https://www.xfinity.com/support/articles/port-forwarding-xfinity-wireless-gateway>



## Assuring Software Clients Connect to the Server

### When the Computer Host Name Changes

When the Host Name is changed (on purpose or accidentally...) you will need to:

- Edit all the values in the ProxessIQ Configuration File, changing the old to the new name
- Reload the config file, or change it manually in the “Load Client Config File” screen
- In ProxessIQ Control Center, change the old to the new Host Name in the Certificate Bindings

### When a computer changes from a Wired to a WiFi connection:

- When a computer changes from a wired to a wireless (WiFi) connection, be certain to delete the localhost IP address listen in C://Windows/System32/drivers/etc/hosts



# Software Licenses for: ProxessIQ™ & Mobile Credentials/Keys

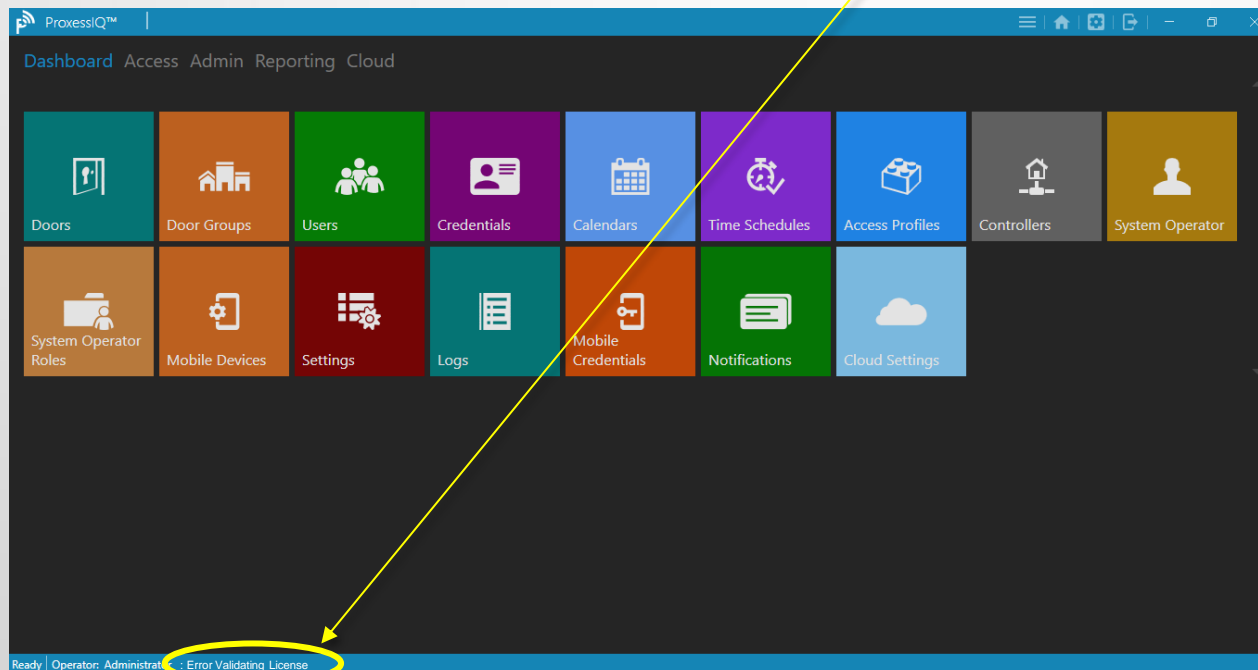
When prompted to provide a license file in a ProxessIQ™ system and in order to add mobile credentials/keys to your system, a Proxess employee or authorized dealer will email a license package, as a .zip file.



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

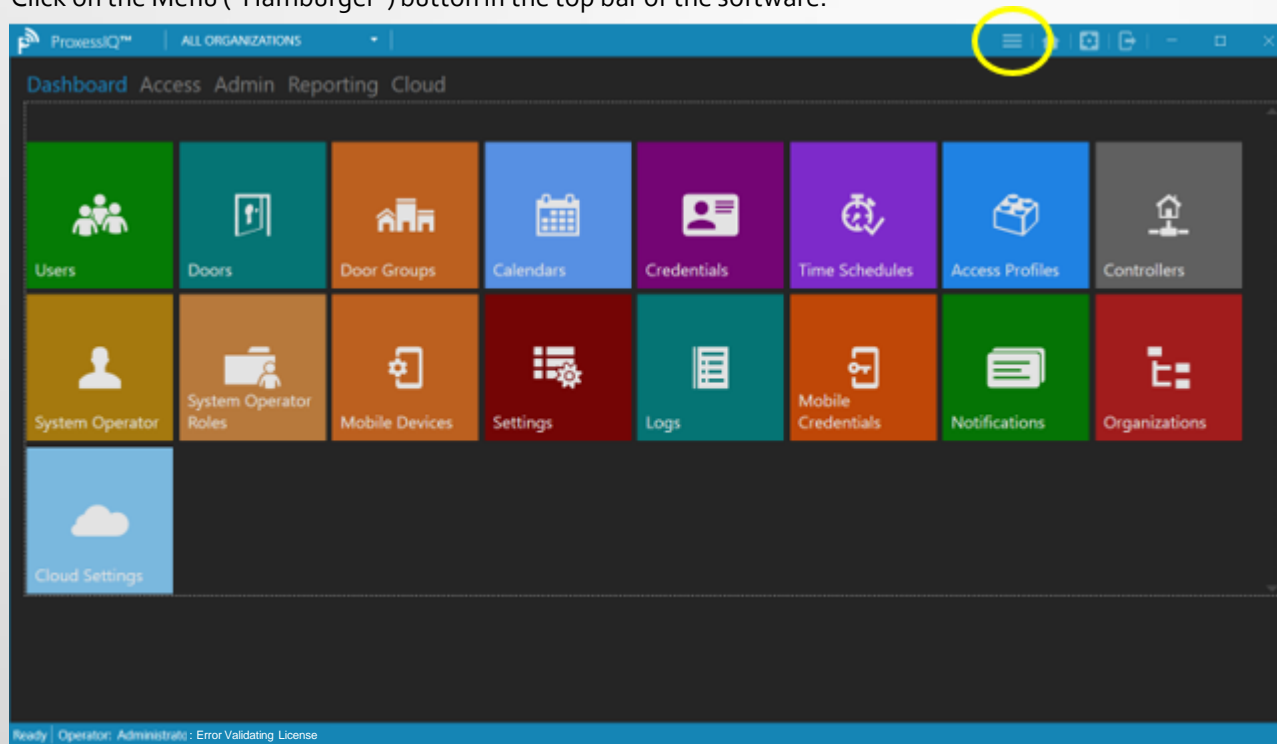
The first file we will address is the .lic validation and feature license for the ProxessIQ software.

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



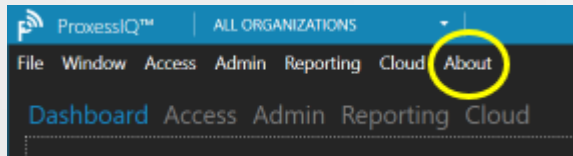
Install the license file using the following instructions.

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

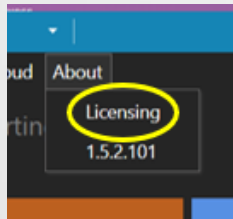




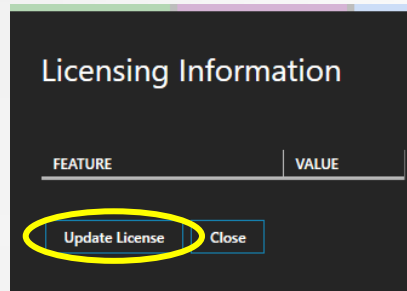
In the white menu items that appear, Click on "About".



Click "Licensing"



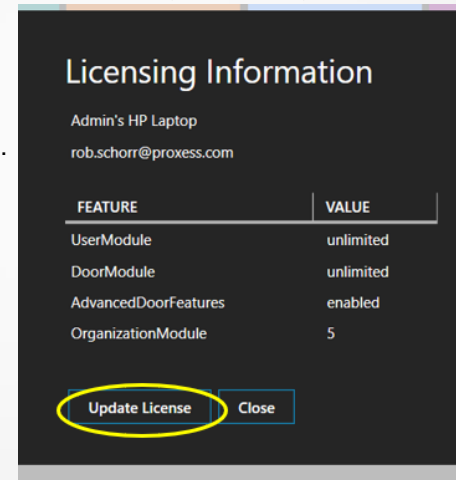
(In a New System)



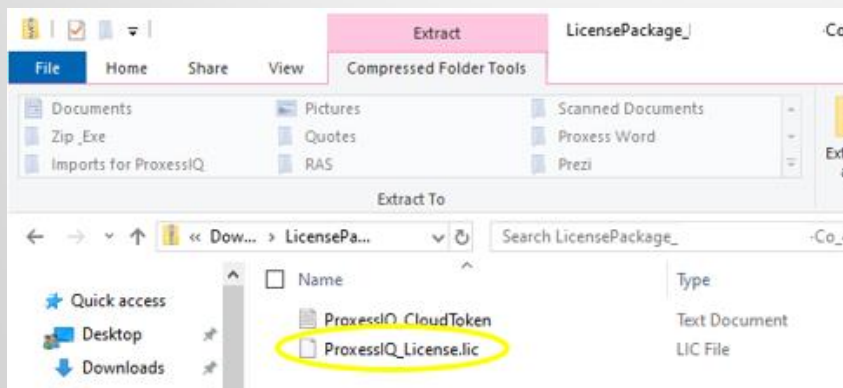
Click "Update License"

(Updating an Existing System)

...OR...



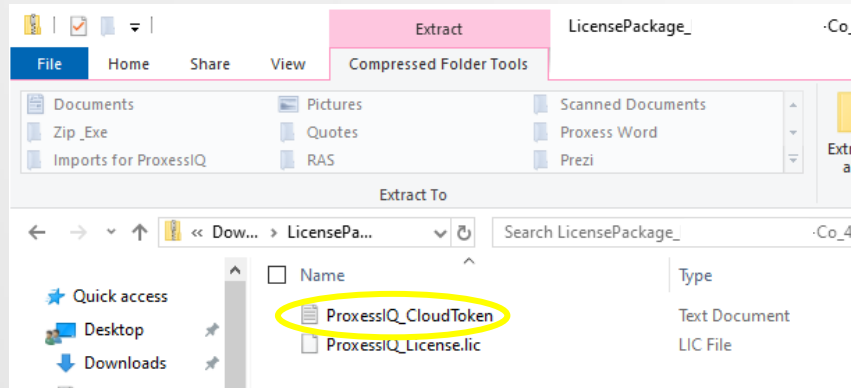
Locate the file location you save the .lic file to and double click on it.



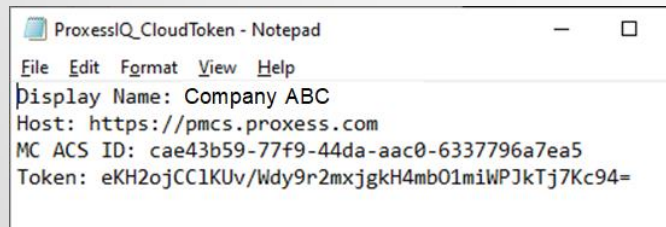
Your ProxessIQ software will now be licensed with the attributes that were purchased and you can return to the program to continue programming your system.

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

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



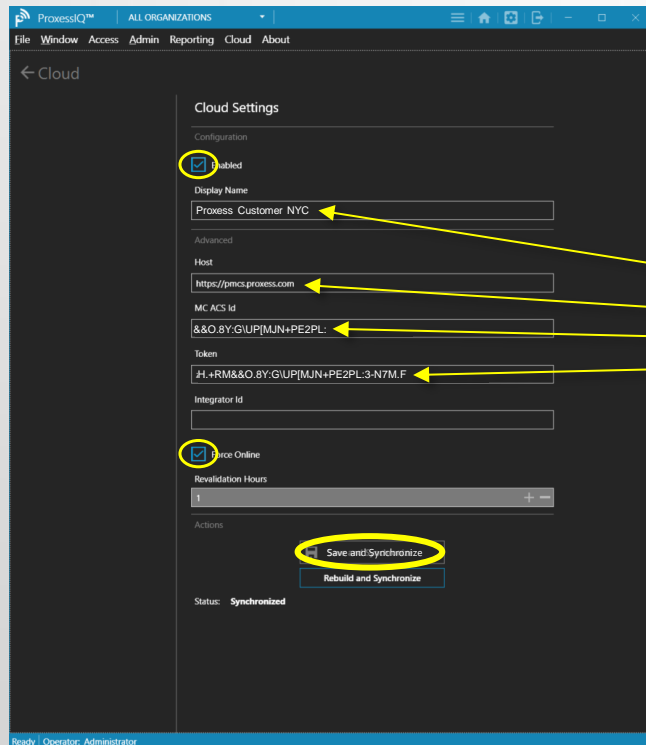
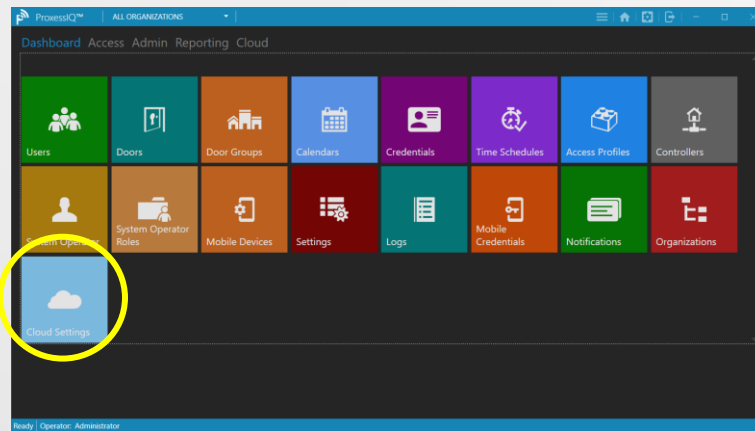
Allow this file to open in Notepad, or a similar program.



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

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

From the ProxessIQ dashboard, click on Cloud Settings .

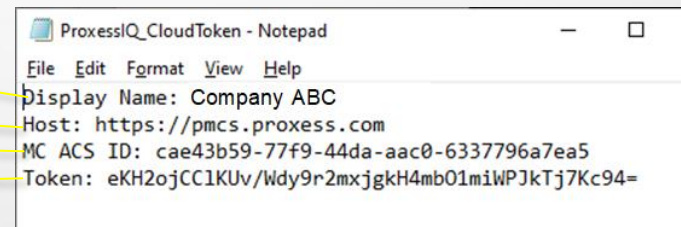


Check the "Enabled" box.

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

Leave the "Forced Online" box checked.

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



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



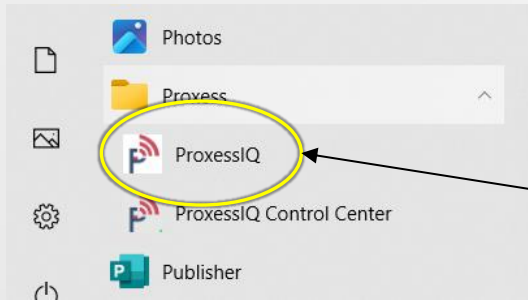
# Begin Programming ProxessIQ™

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

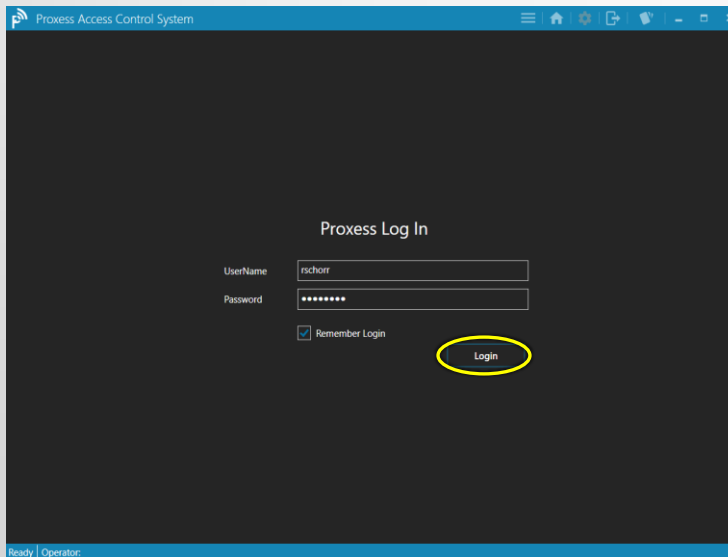
Each module has dependencies on the previous modules, so attempting to configure a system out of this order may not be the most efficient, as it may result in the need to go back to the prescribed order to fill in various missing data entry fields.



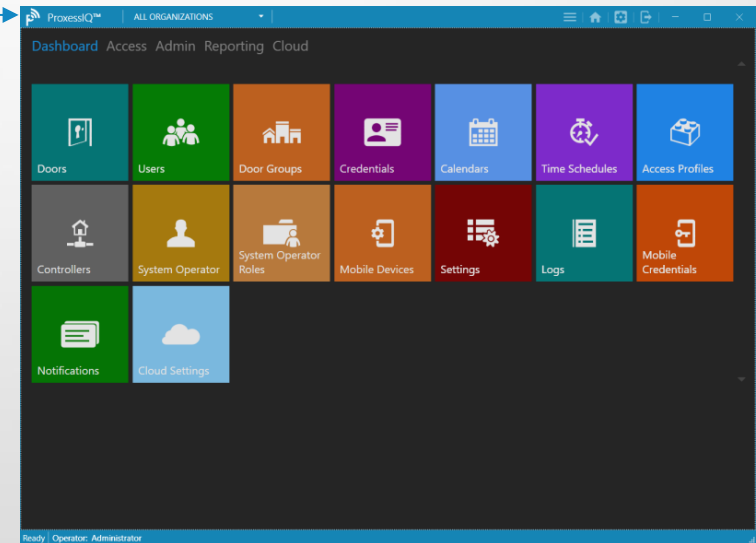
## Opening the ProxessIQ Client Administrative Interface



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



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



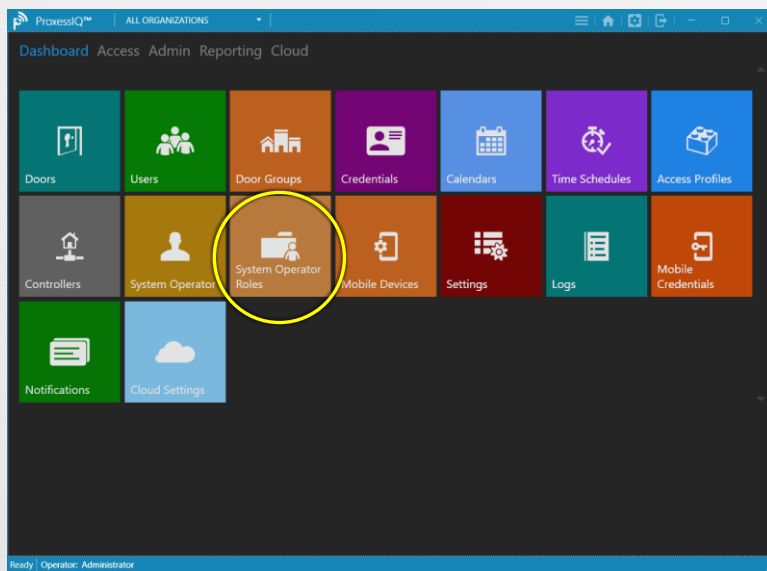
The Dashboard \ Home Screen will appear. In a later section we will show how to add the shortcut menu and change the background and icon colors, order and visibility. Click on the Module/Menu (the large icons) you wish to enter.



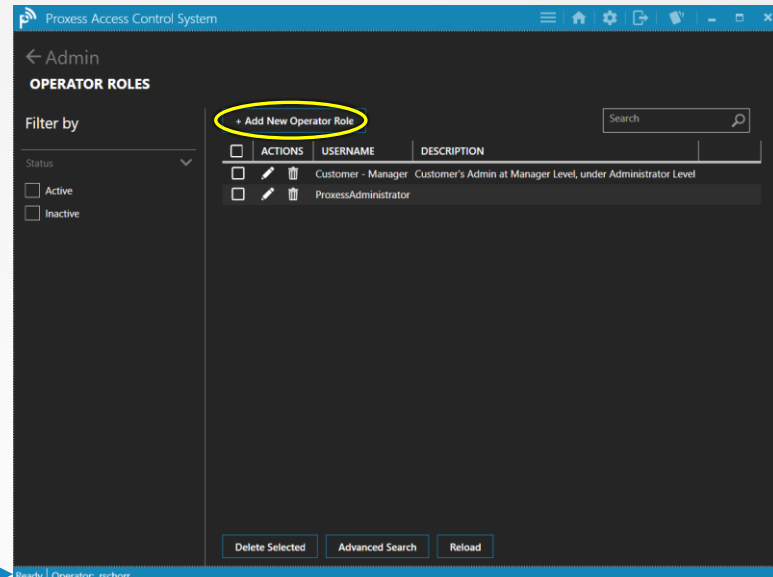
# OPERATOR ROLES



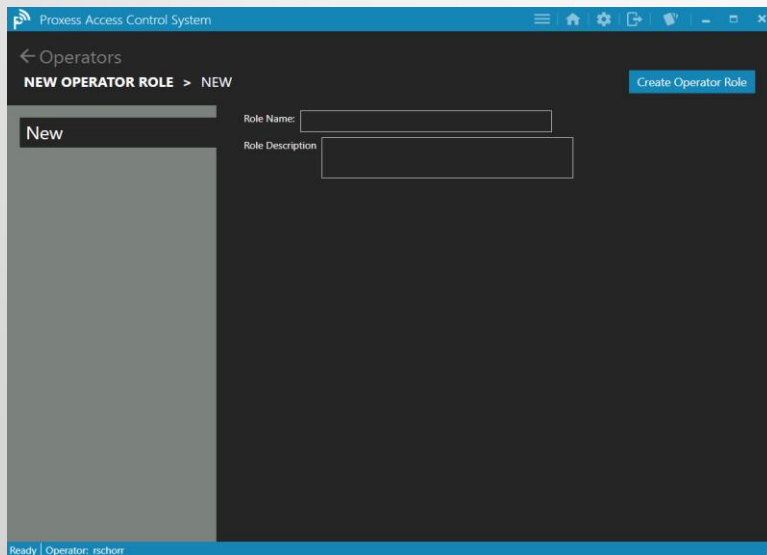
## Operator Roles - 1



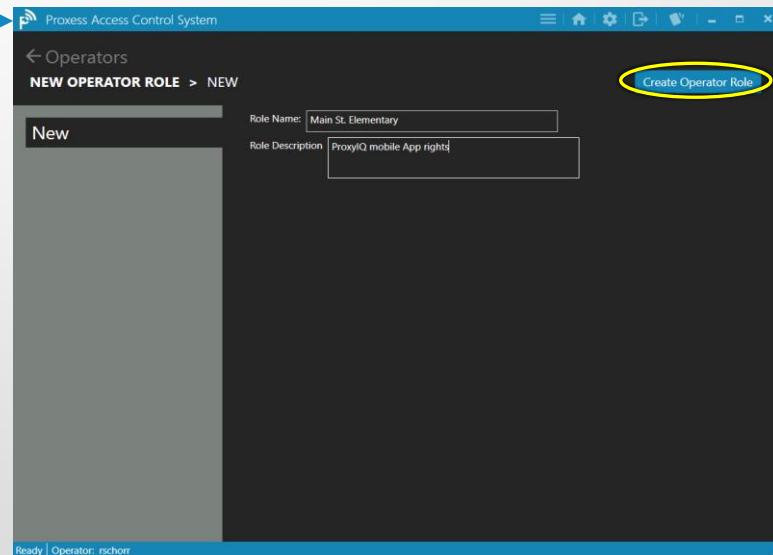
Operator Roles define what Modules (the large icons) Operators will have access to and what actions they will be able to perform once in that section. Click "System Operator Roles".



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



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



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



## Operator Roles - 2

Proxess Access Control System

← Operators

MAIN ST. ELEMENTARY > GENERAL

Save

General

Role Name: Main St. Elementary

Role Description: ProxyIQ mobile App rights

Privileges

Ready | Operator: nschorr

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

Proxess Access Control System

← Operators

MAIN ST. ELEMENTARY > PRIVILEGES

Save

General

Privileges

Door Module	<input type="radio"/> Manage	<input type="radio"/> Read	<input checked="" type="radio"/> None
User Module	<input type="radio"/> Manage	<input type="radio"/> Read	<input checked="" type="radio"/> None
Credential Module	<input type="radio"/> Manage	<input type="radio"/> Read	<input checked="" type="radio"/> None
Access Profile Module	<input type="radio"/> Manage	<input type="radio"/> Read	<input checked="" type="radio"/> None
Calendar Module	<input type="radio"/> Manage	<input type="radio"/> Read	<input checked="" type="radio"/> None
Time Schedule Module	<input type="radio"/> Manage	<input type="radio"/> Read	<input checked="" type="radio"/> None
Controller Module	<input type="radio"/> Manage	<input type="radio"/> Read	<input checked="" type="radio"/> None
Mobile Programming Device Module	<input type="radio"/> Manage	<input checked="" type="radio"/> Read	<input type="radio"/> None
Log Module	<input type="radio"/> Manage	<input type="radio"/> Read	<input checked="" type="radio"/> None
Settings	<input type="radio"/> Manage	<input type="radio"/> Read	<input checked="" type="radio"/> None

Ready | Operator: nschorr

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.

Proxess Access Control System

← Operators

MAIN ST. ELEMENTARY > PRIVILEGES

Save

General

Privileges

Role Privileges Saved

The role privileges have been saved

OK

Ready | Operator: nschorr

The above screen appears. Click "OK".

Proxess Access Control System

← Admin

OPERATOR ROLES

Filter by

+ Add New Operator Role

Search

	ACTIONS	USERNAME	DESCRIPTION
<input type="checkbox"/>		Customer - Manager	Customer's Admin at Manager Level, under Administrator Level
<input checked="" type="checkbox"/>		Main St. Elementary	ProxyIQ mobile App rights
<input type="checkbox"/>		ProxessAdministrator	

Delete Selected Advanced Search Reload

Ready | Operator: nschorr

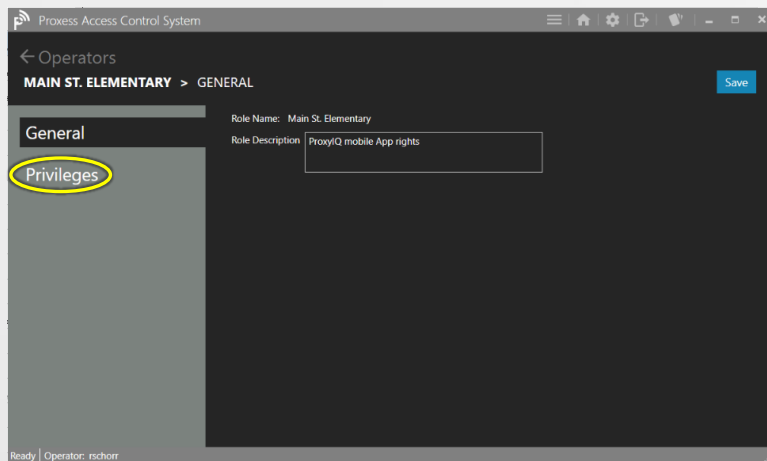
Search for an Operator by typing the first few letters of their name. The resulting list will automatically appear.

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.

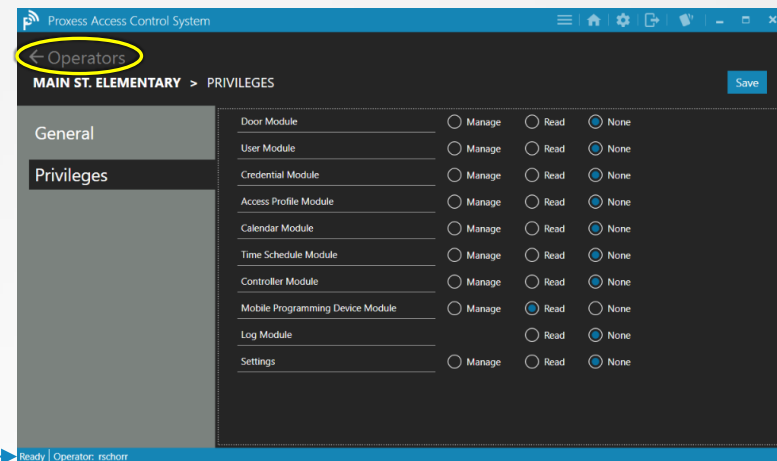




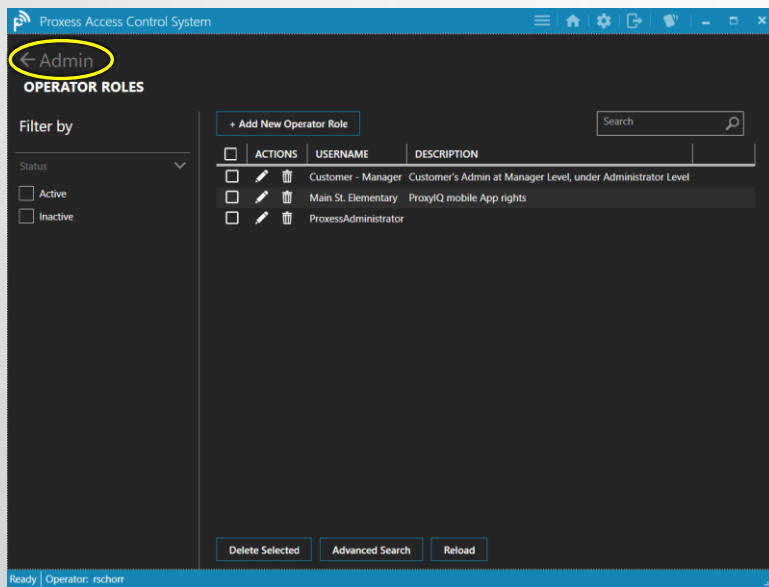
## Operator Roles - 3



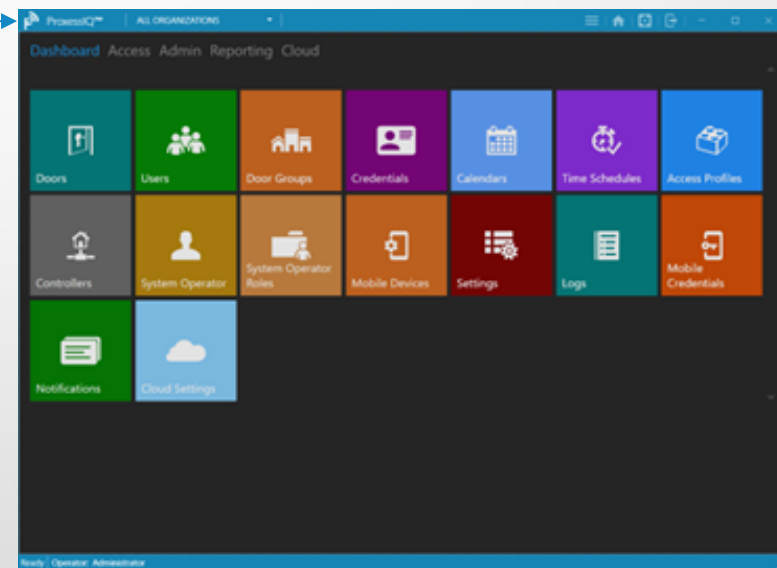
The Role you selected will appear. You may change any notes you wish. Click on the Privileges label to review those rights.



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



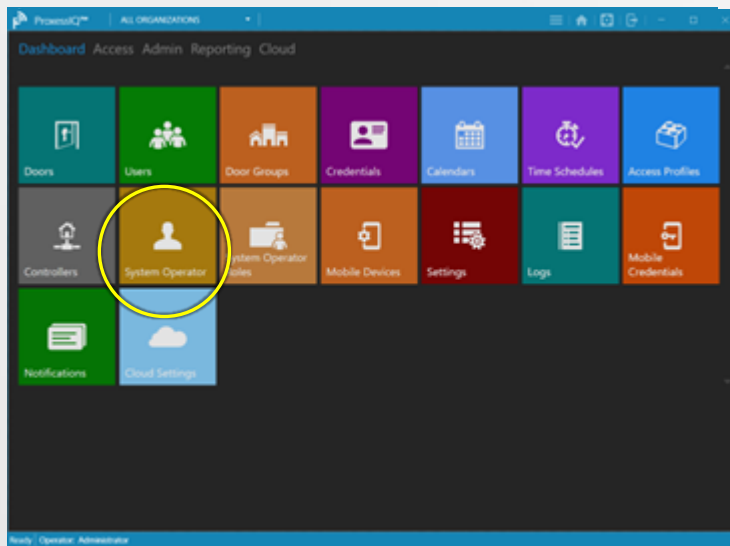
The main Operator Roles screen appears. Click on the "Admin" tag to return to your Home view.



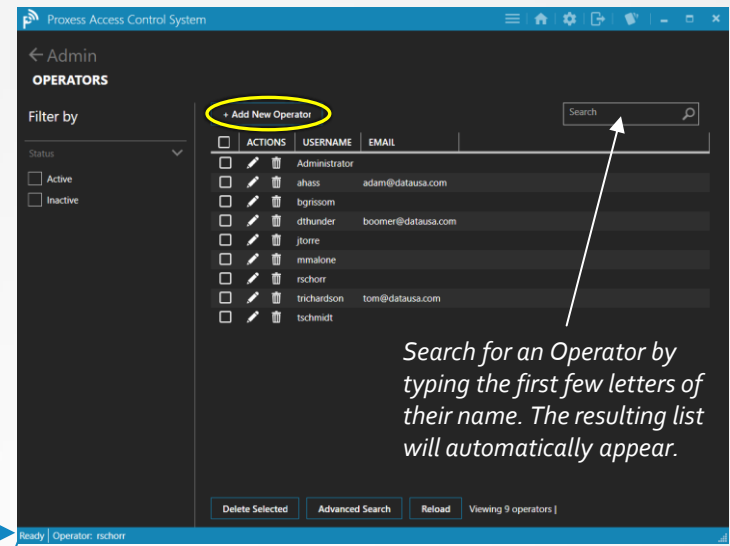
You will be returned to your Home Screen \ Dashboard.



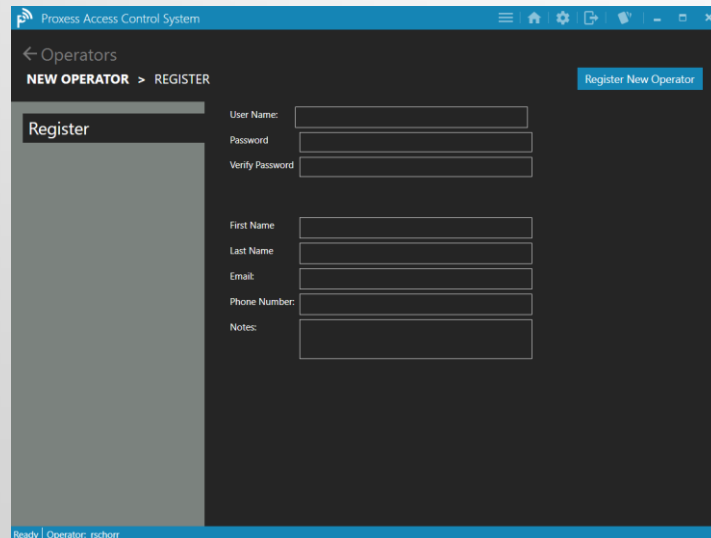
# OPERATORS



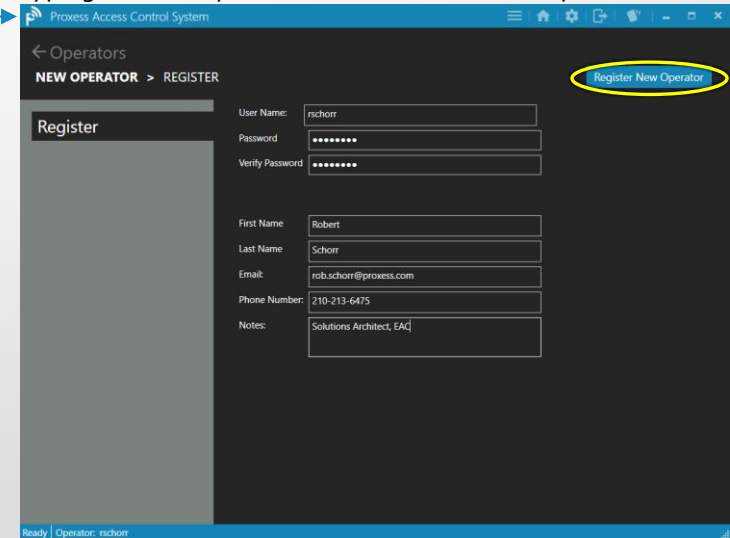
From the Home Screen (Dashboard) click on the System Operators icon, where you will be able to add and modify individual operators\programmers, including assigning them to one or more Operator Groups.



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.



Proxess Access Control System

← Operators  
RSCHORR > GENERAL

General

Change Password

Roles

User Name: rschorr

First Name: Rob

Last Name: Schorr

Email: rob.schorr@proxess.com

Phone Number: 210-213-6475

Notes: Solutions Architect, EAC

Save

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".

Proxess Access Control System

← Operators  
RSCHORR > GENERAL

General

Change Password

Roles

User Name: rschorr

First Name: Rob

Last Name: Schorr

Email: rob.schorr@proxess.com

Phone Number: 210-213-6475

Notes: Solutions Architect, EAC

Save

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

Proxess Access Control System

← Operators  
RSCHORR > ROLES

General

Change Password

Roles

↓ Add Operator To Role

ACTIONS	NAME
<input type="checkbox"/>	ProxessAdministrator

Remove Selected

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.

Proxess Access Control System

← Operators  
RSCHORR > ROLES

General

Change Password

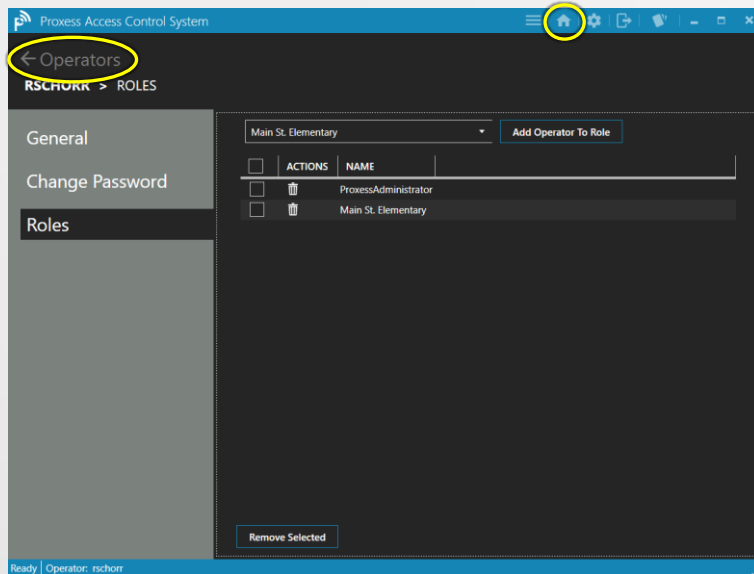
Roles

↓ Add Operator To Role

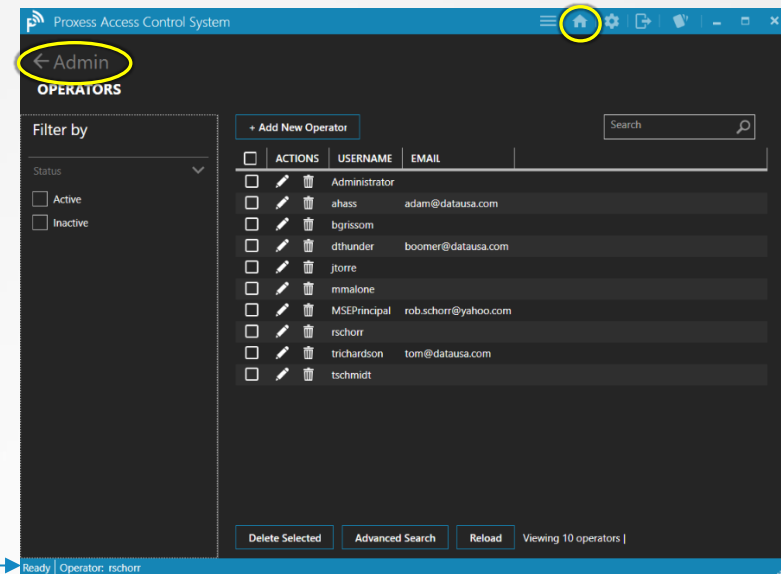
- Customer - Manager
- Main St. Elementary
- ProxessAdministrator

Remove Selected

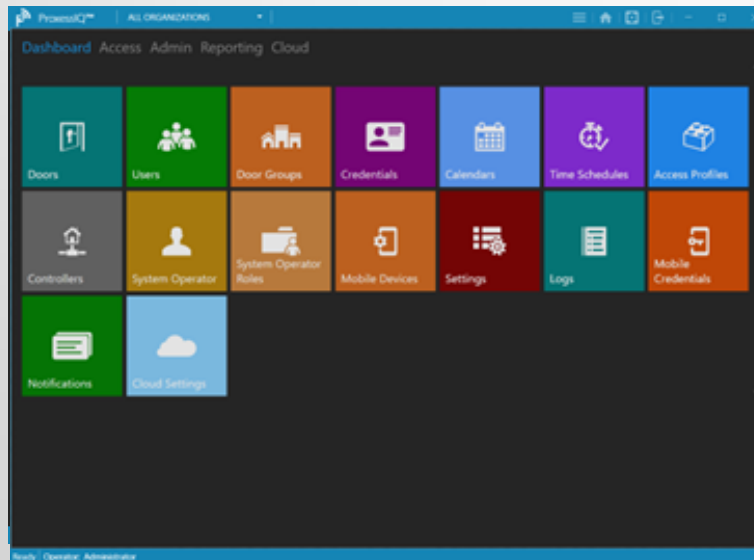
Select an additional or initial Operator Role to apply to this Operator.



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



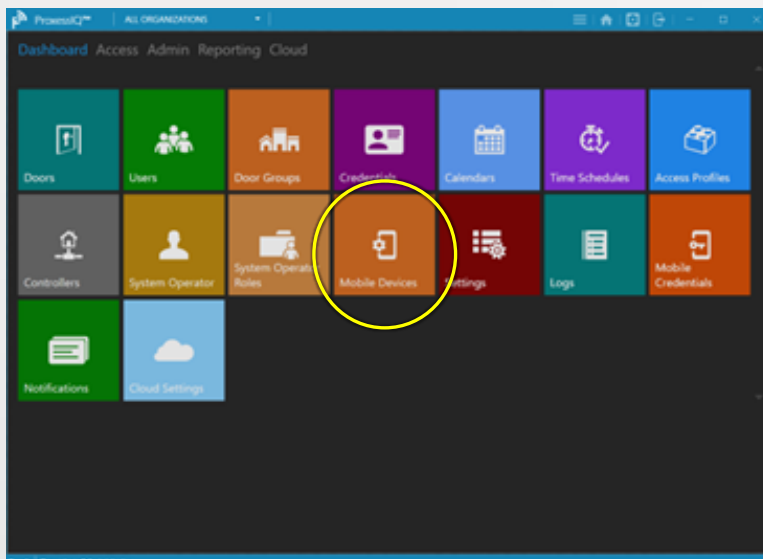
This is the list of all the Operators, including the one that was just added. To return to the Home Screen \ Dashboard, click on either the Home icon on the top task bar, or the "Admin" tab at the top left of the page.



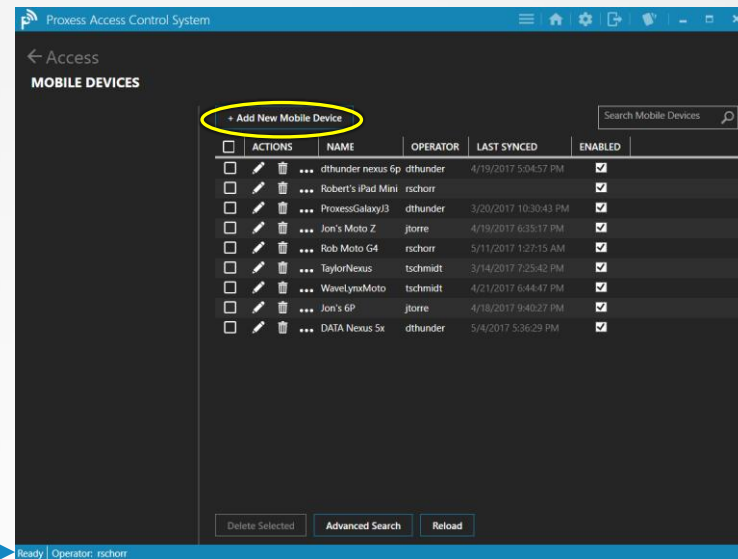
You have returned to the Dashboard \ Home Screen.



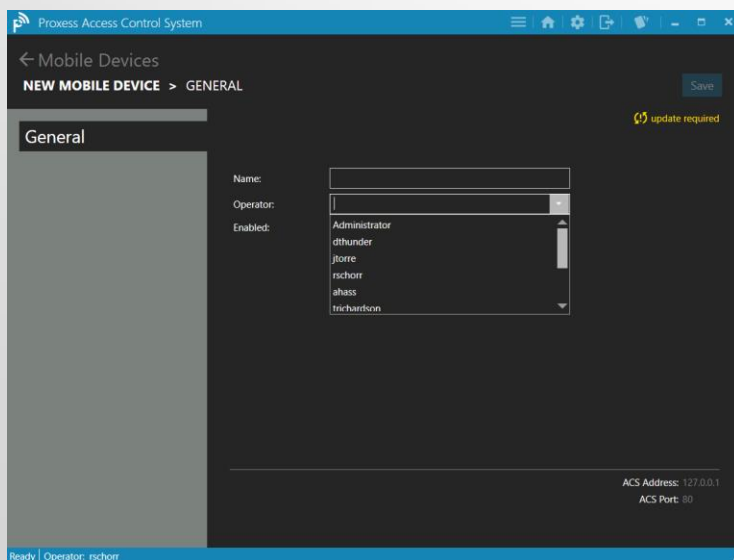
# MOBILE DEVICES



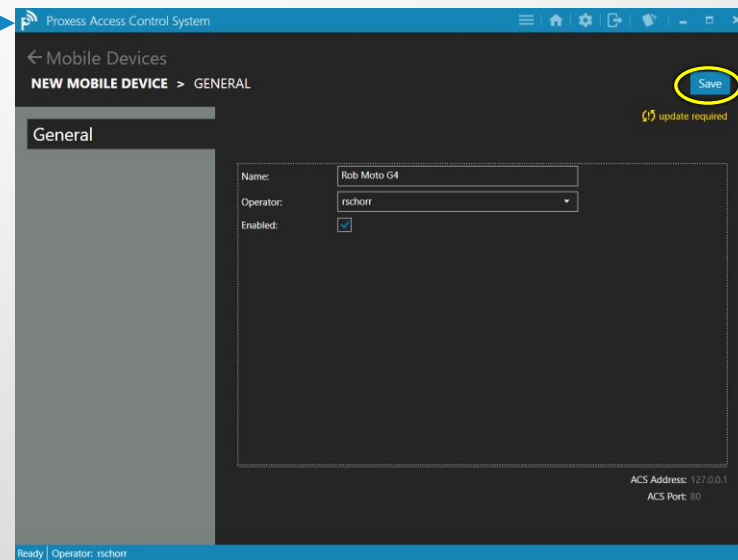
To add a new (and manage existing) mobile phone to be used as an in-the-field programming device click on the "Mobile Devices" module icon.



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



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



Check the Enabled box and click "Save".



Click "OK".

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

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

ACTIONS	NAME	OPERATOR	LAST SYNCED	ENABLED
<input type="checkbox"/>	dthunder nexus (p	dthunder	4/19/2017 5:04:57 PM	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Robert's iPad Mini	rschoor		<input checked="" type="checkbox"/>
<input type="checkbox"/>	ProccessGalaxy3	dthunder	3/20/2017 10:30:43 PM	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Jon's Moto 2	jiorre	4/19/2017 6:35:17 PM	<input checked="" type="checkbox"/>
<input type="checkbox"/>	TaylorNexus	techniatt	3/14/2017 7:25:42 PM	<input checked="" type="checkbox"/>
<input type="checkbox"/>	WavelynxMoto	techniatt	4/21/2017 6:44:47 PM	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Jon's 6P	jiorre	4/18/2017 5:40:27 PM	<input checked="" type="checkbox"/>
<input type="checkbox"/>	DATA Nexus 5x	dthunder	3/4/2017 5:36:29 PM	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Rob Moto G4	rschoor	5/11/2017 12:00:16 PM	<input checked="" type="checkbox"/>

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 ADMIN APP

## IQ Mobile (formerly Proxess Sync™)

# INITIALIZATION

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

It may also be used to program physical credentials

Have your Apple or Android phone ready.



# iPhone

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

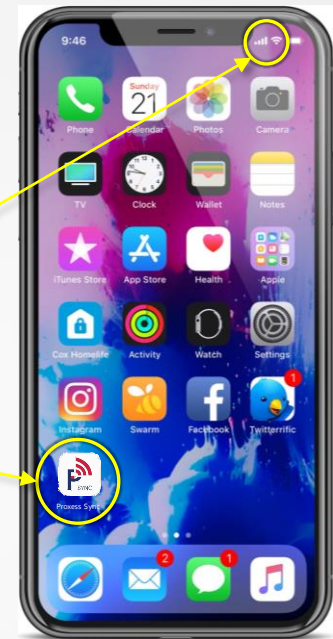


For lockset communication, assure Bluetooth is turned on in the Settings app.

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



Click the Proxess icon to open the App.



## Mobile App Screenshot



Allow the app to use the camera on your phone.

## PC Software Screenshot

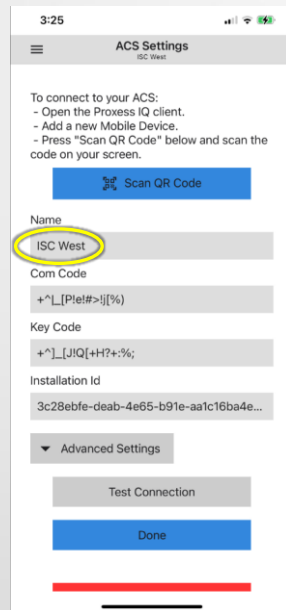


The app will open and ask you to confirm you will allow it to sue the camera on your phone. Confirm this and the above scanner image will open. Point your phone's camera to view the QR code that appears in the screen in the software when your new Mobile Device was added, shown in the image on the right.

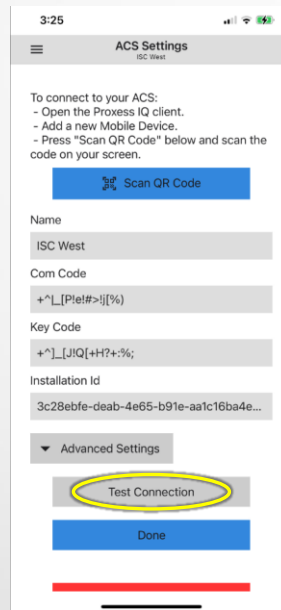


**NOTE:** There are a few ways to scan the QR code in the software with the mobile phone being added:

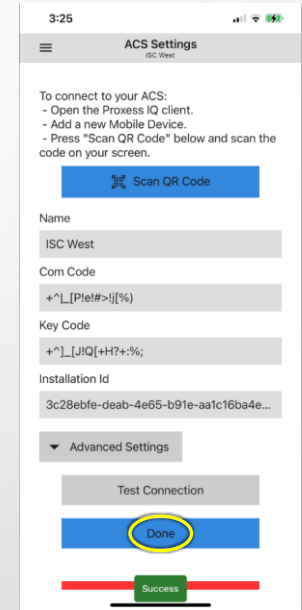
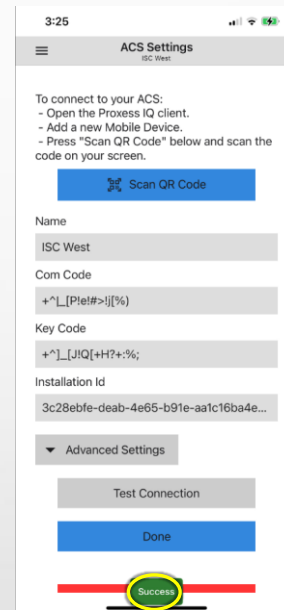
- The first is to bring the phone to the software, open the “Mobile Devices” module and click the edit button for the mobile device being added where the QR code will then appear. With the scanner screen open, hold the phone over the code and all of the connection data will automatically populate as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



Name this as the system you are connecting to.

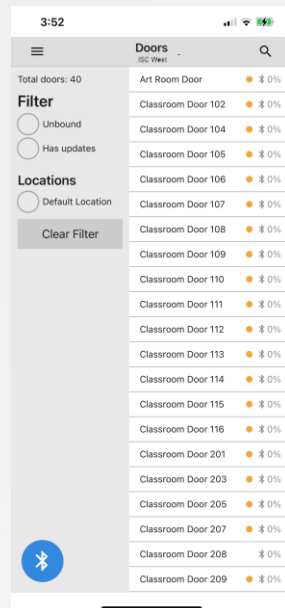
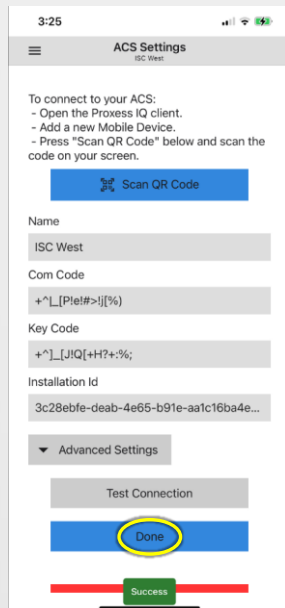


At the bottom of the screen, you may click “Test Connection” to verify the setup was successful.

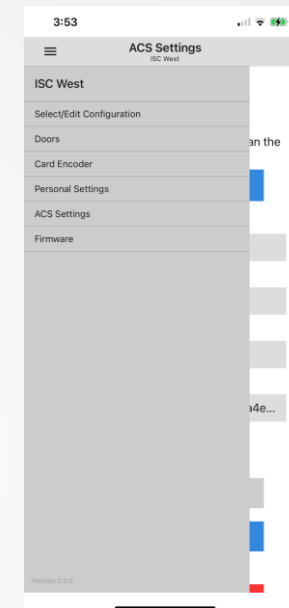
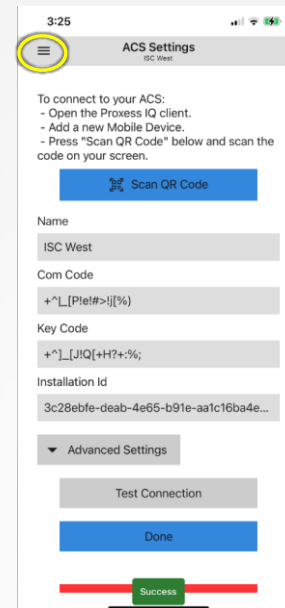


Click Done to return to the Proxess Sync™ Home screen for this system.

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

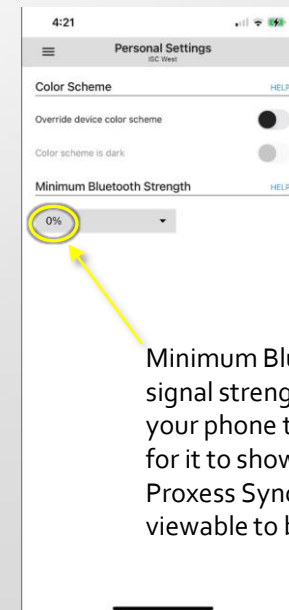
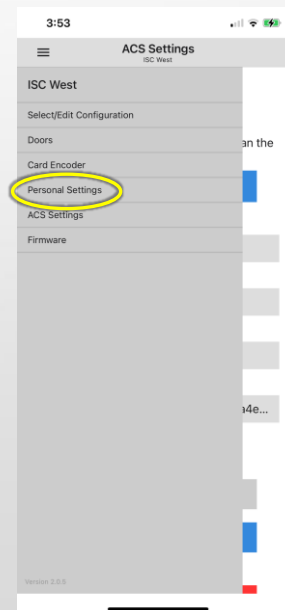
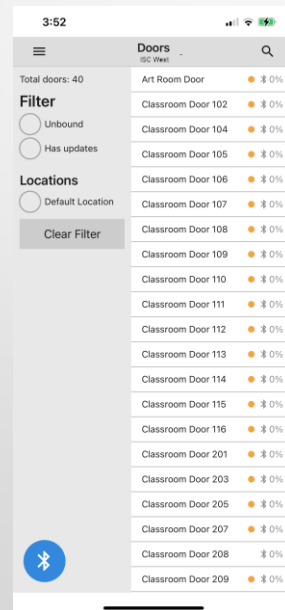
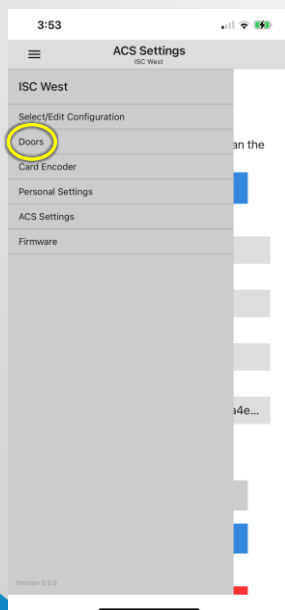


...OR...



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

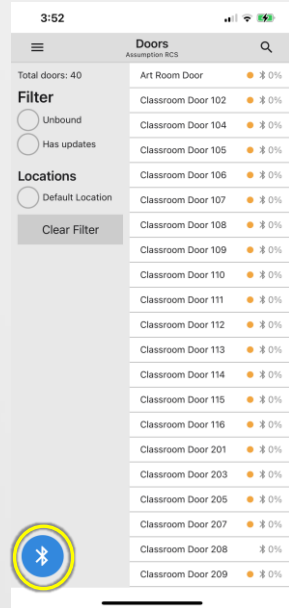
You may also click on the Menu/Hamburger button, which will take you to the overall Menu for Proxess Sync.



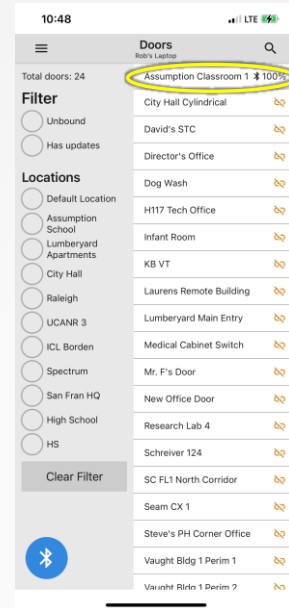
Minimum Bluetooth signal strength from your phone to a lock for it to show up in Proxess Sync to be viewable to be sync'd.

Click on Doors to bring you to the Doors screen.

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

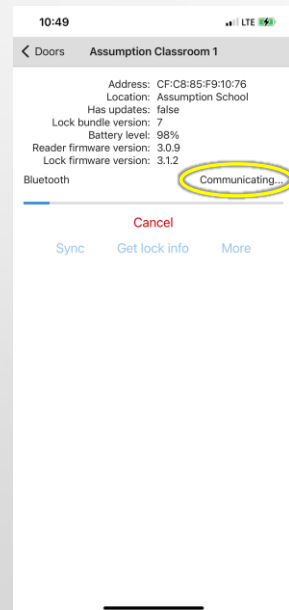
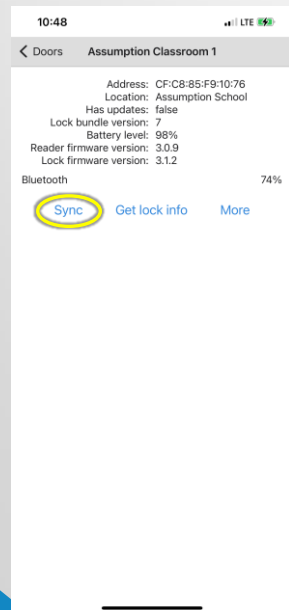


...OR....

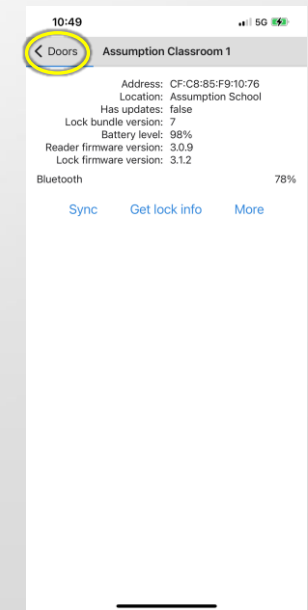
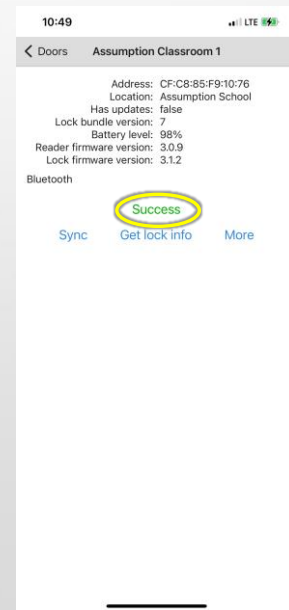


As an alternative to clicking on the Door name to initialize/ sync it, Click on the Bluetooth icon and all the nearby doors will appear. The % indicates the Bluetooth signal strength of each lock. Place your phone near the front-facing plastic of the lock

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



Click Sync to initialize or update a lock.



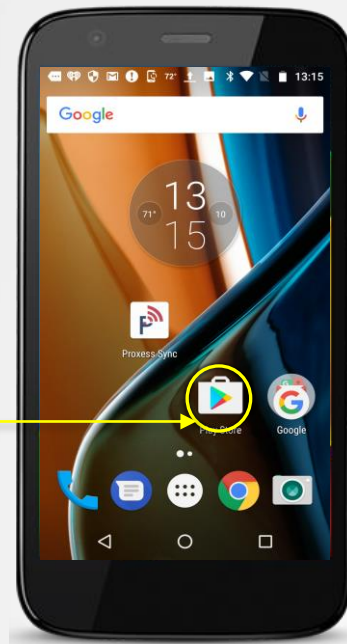
Success will be displayed and you can return to the Doors screen.



# Android

## Proxess Sync™ Initialization - 5

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

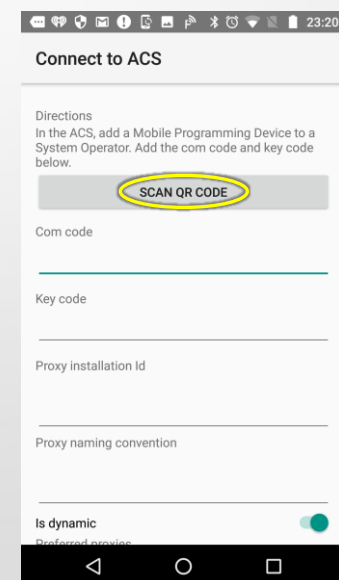
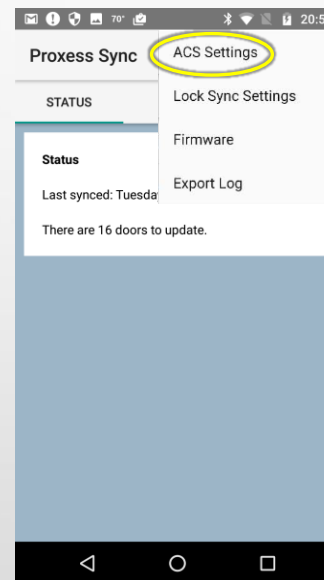
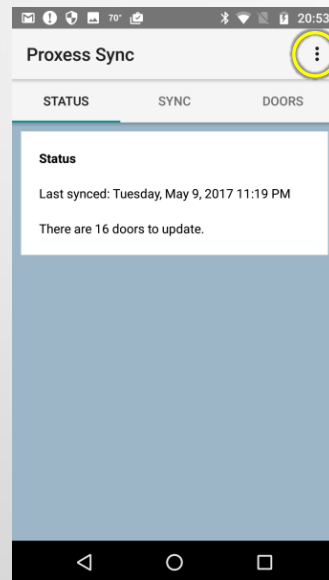


For lockset communication, assure Bluetooth is turned on.

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



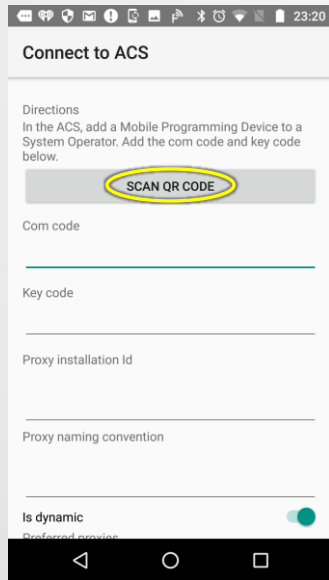
Click the Proxess icon to open the App.



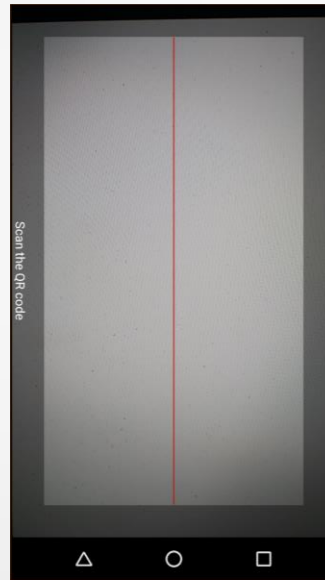
The screen on the left will appear the first time the App is opened. Future openings of the App will display the last screen viewed from the last time the App was closed. Click the icon circled. Then click "ACS Settings" from the menu. The screen on the right appears. To initiate the App, click on "Scan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



Mobile App Screenshot



Mobile App Screenshot



PC Software Screenshot



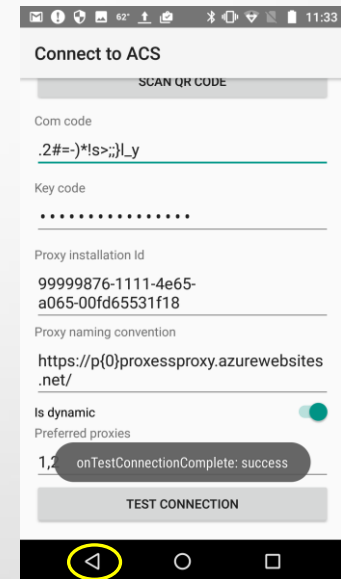
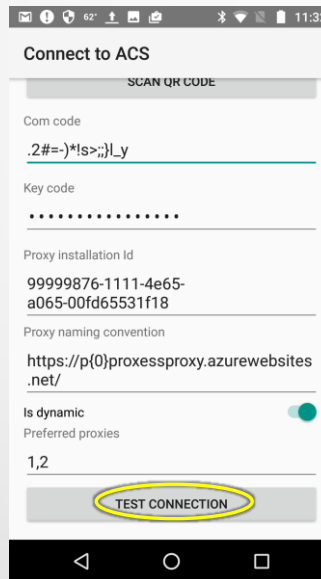
The screen on the left opens. Click the “SCAN QR CODE” button and the scanner screen in the center opens. This is a scanner, which uses your phone’s camera to view the QR code that has appeared in the screen in the software where your new Mobile Device was added, shown in the image on the right.





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

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



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

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

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





# IQ MOBILE phone app:

## UPDATING a LOCKSET

- Audit retrieval
- Time Schedule changes
- Functional changes
- Remote support

## ProxessIQ Mobile



**ProxessIQ Mobile** is an application suite for remote observation and control and consist of the following modules.

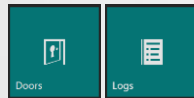
Synchronization module, with the following subsystems, with its access rights governed in the Mobile Devices menu:



Doors: For Initializing, Synchronizing, Updating, Audit retrieval



Card Encoder: For encoding or wiping cards that have been entered into the software

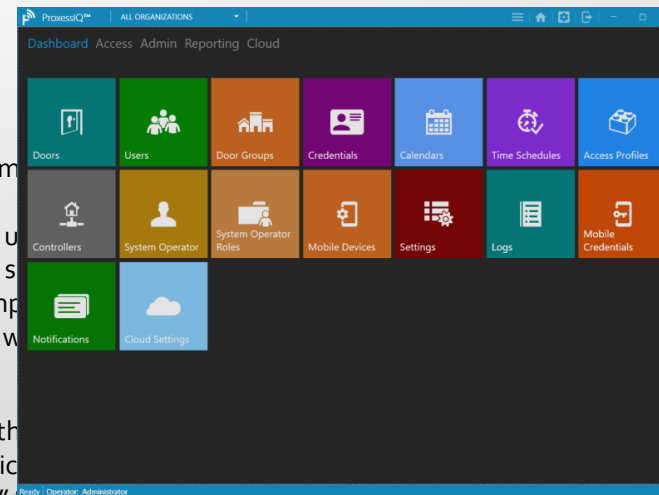


Users module :  
Doors module :  
Logs module :

Rights that allow a user to perform the functions of each module are established in this manner:

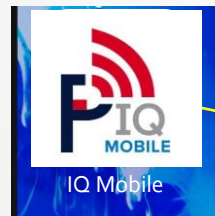
**NOTE:** Bear in mind that Proxess Sync™ is a passive and user interface that the programming is done only from the ProxessIQ™ software. The Proxess Sync™ is simply presented to the locksets and the operator will simply click a button for the programming changes to be synchronized with the locksets.

To use the Proxess Sync™ App to update locksets and gather data to send to the ProxessIQ™ software, open the App and click on 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.





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

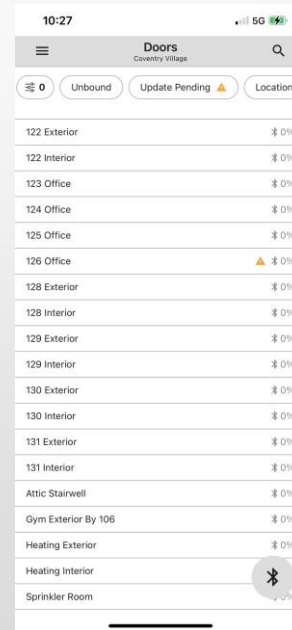
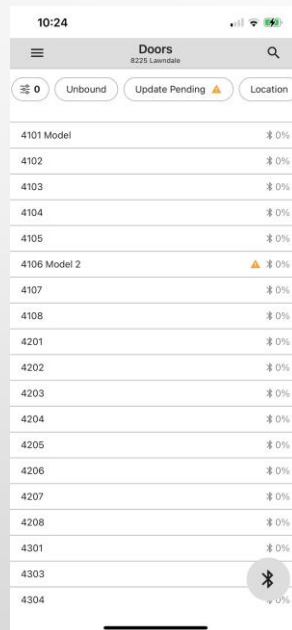
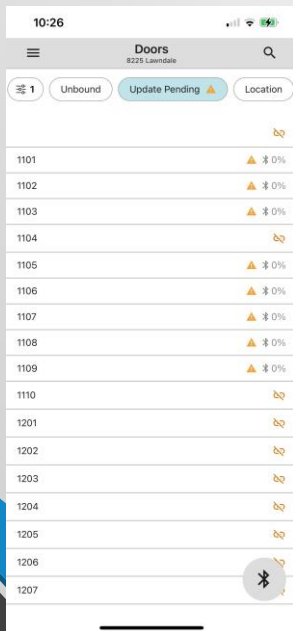
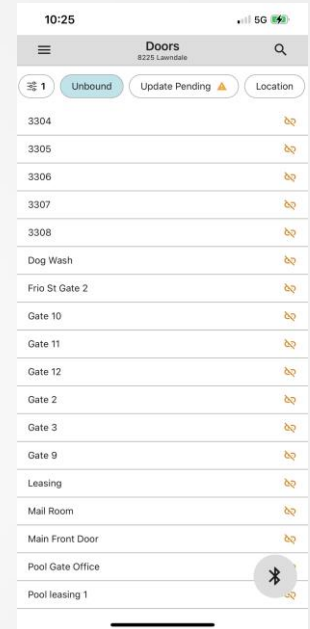
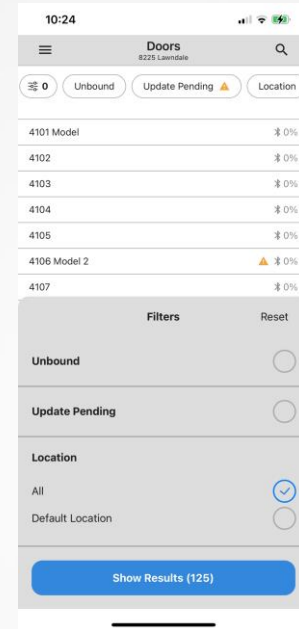
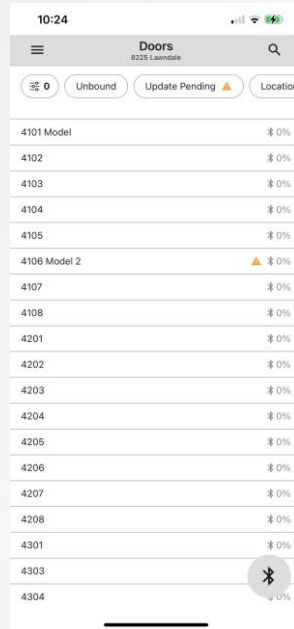
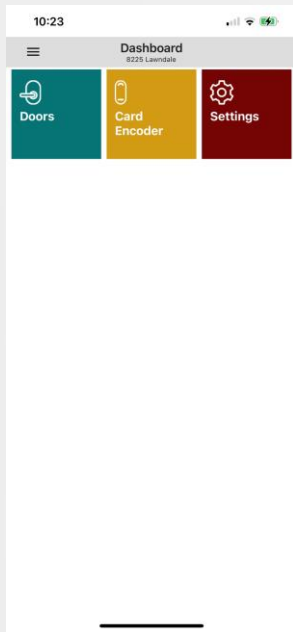
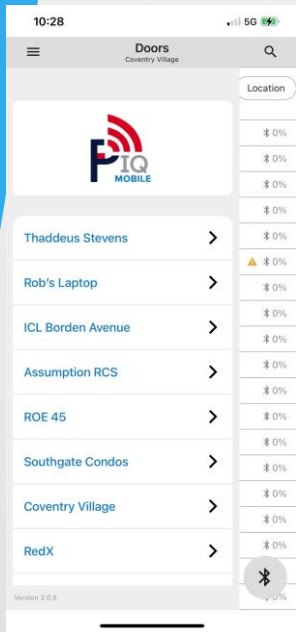


Click the Proxess icon to open the App.



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.

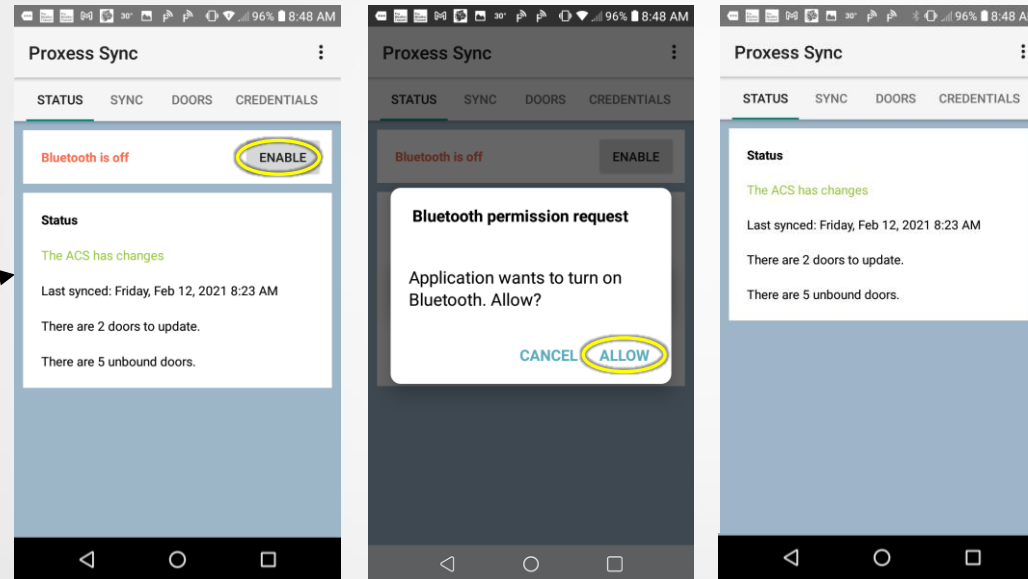
**NOTE:** Before you will be able to proceed, it is also necessary to verify the phone has connectivity to the ProxessIQ™ software wherever it is located, via either the customer's WiFi or the mobile phone network. These are matters for resolution between the customer and the integrator and are not the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





**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.

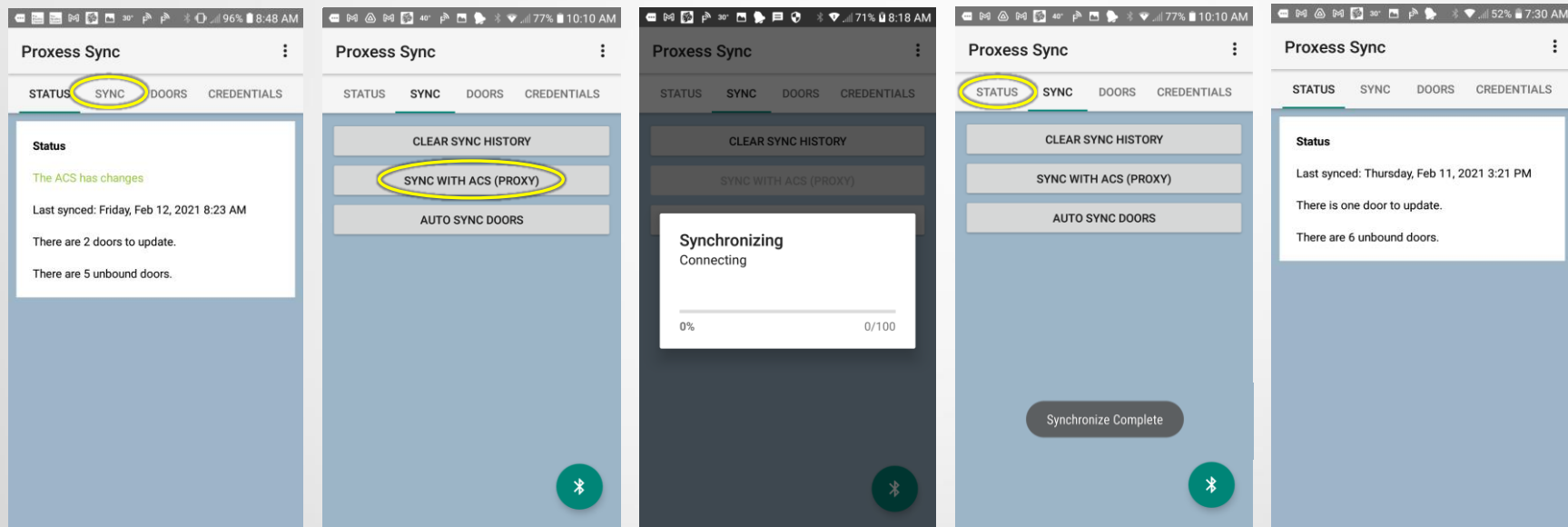


To use the Proxess Sync™ App to update locksets and gather their audit trail data to send to the ProxessIQ™ software, open the App and click on "Status" in the top menu. If Bluetooth on your phone is off, click "Enable" to turn it on or the phone will not be able to communicate with the locksets and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



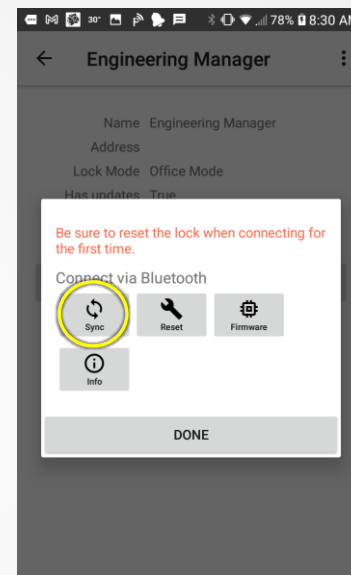
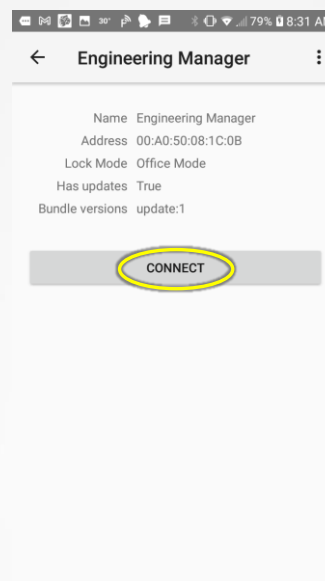
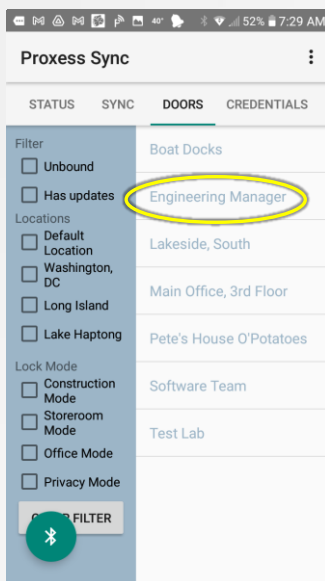
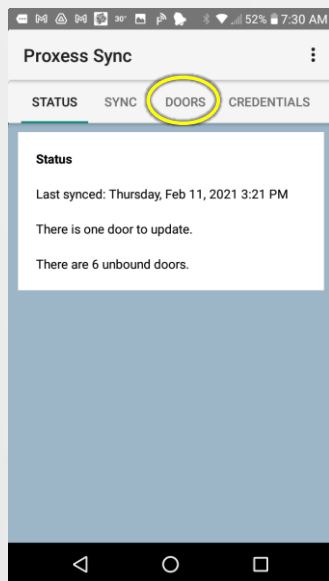
## Sync with the Access Control System



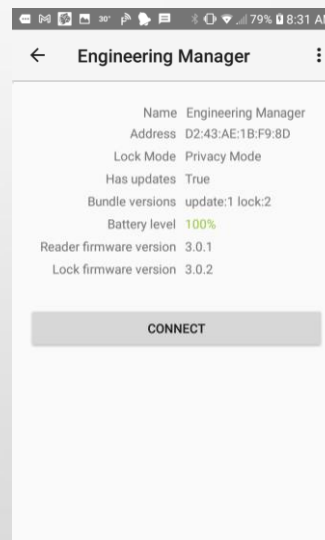
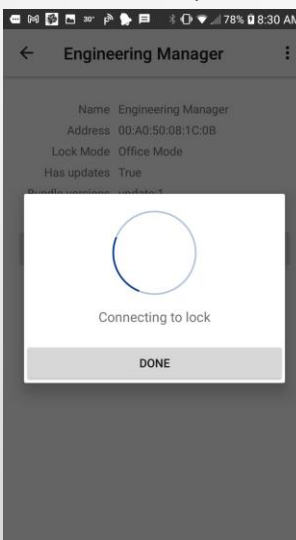
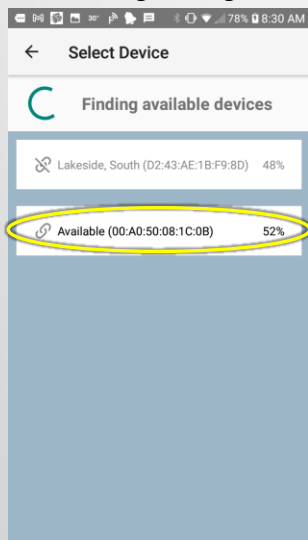
To perform any desired updates on the locksets, updates first need to be delivered to this phone. At this point, the phone does not need to be near any lockset. Click "Sync" from the top menu. The second screen above appears. Click "Sync with ACS" and the status bar will update you with progress and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



# Must Initialize a Lockset Prior to First Synchronization



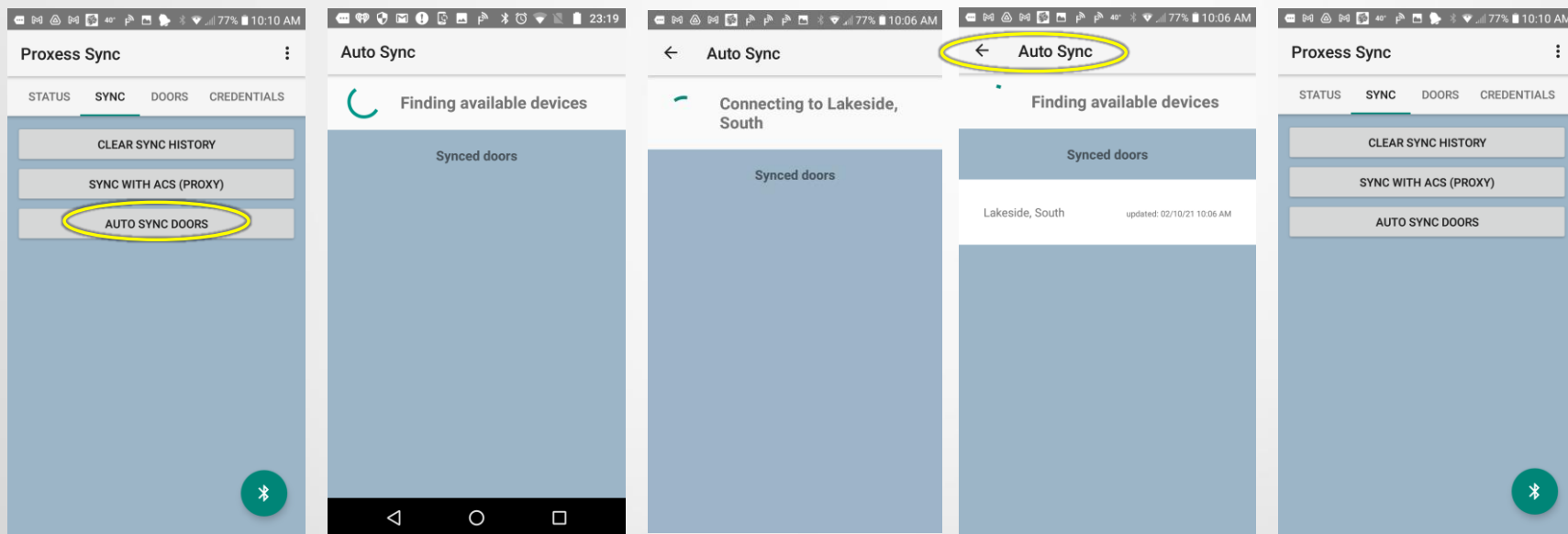
To initialize a lockset click on "Doors" from the top menu. To see the door you are looking for, check the box for the location your lockset resides in. That list of doors will appear. Click on the lockset name to be initialized and the menu for that door will appear. Click on "Connect" and then "Sync"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



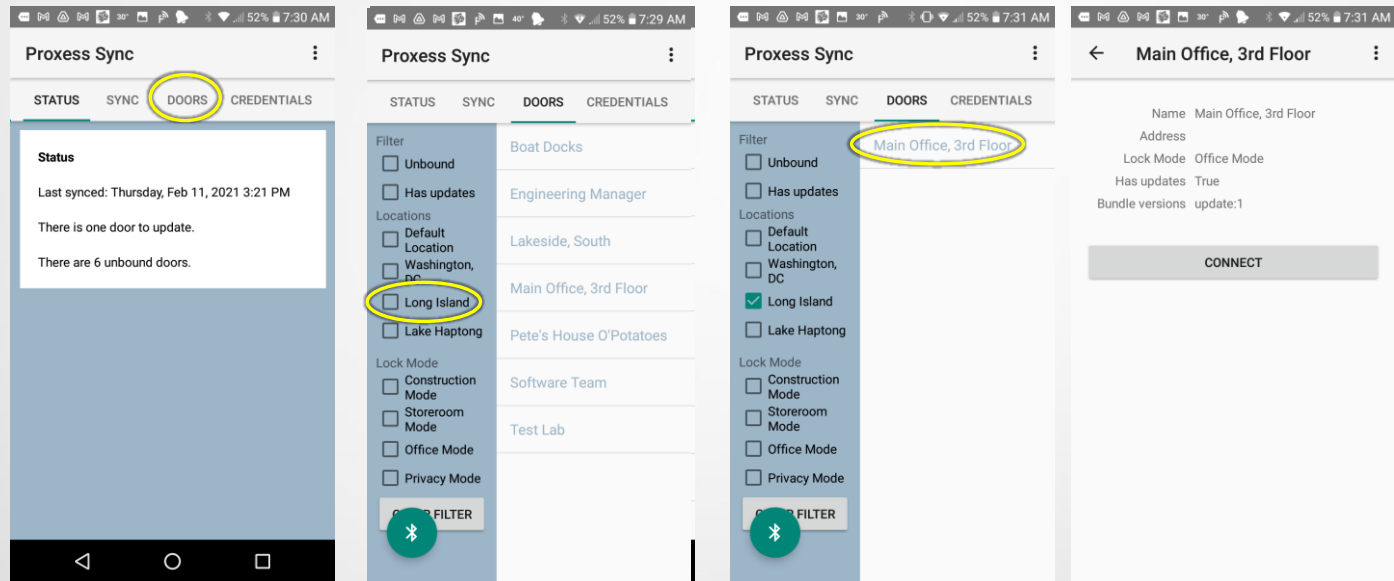
Once the ACS sync is complete and you are ready to update the locksets, click "Auto Sync Doors" and proceed to the first door to be updated. The 2<sup>nd</sup> (second) image will be shown as the App begins looking for locksets. The App will automatically begin the handshake, verification and update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

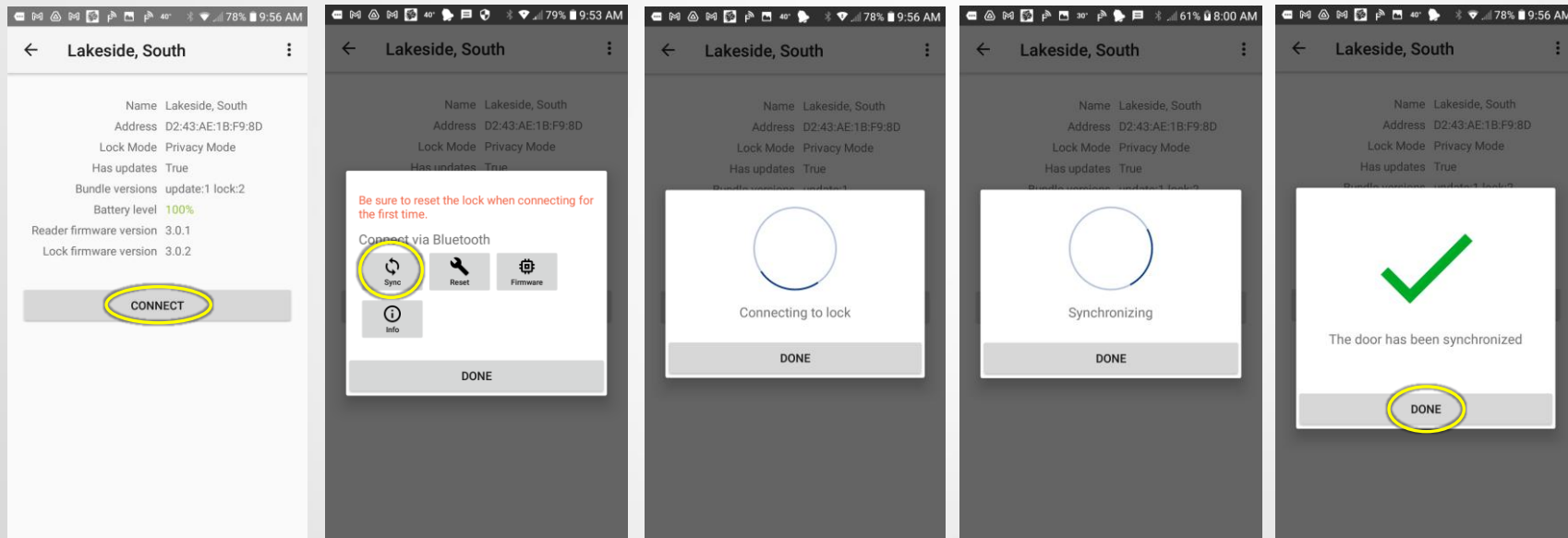


To manually perform any desired update on one specific lockset at a time, follow the instructions to "Sync with ACS" from the beginning of this section.

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.

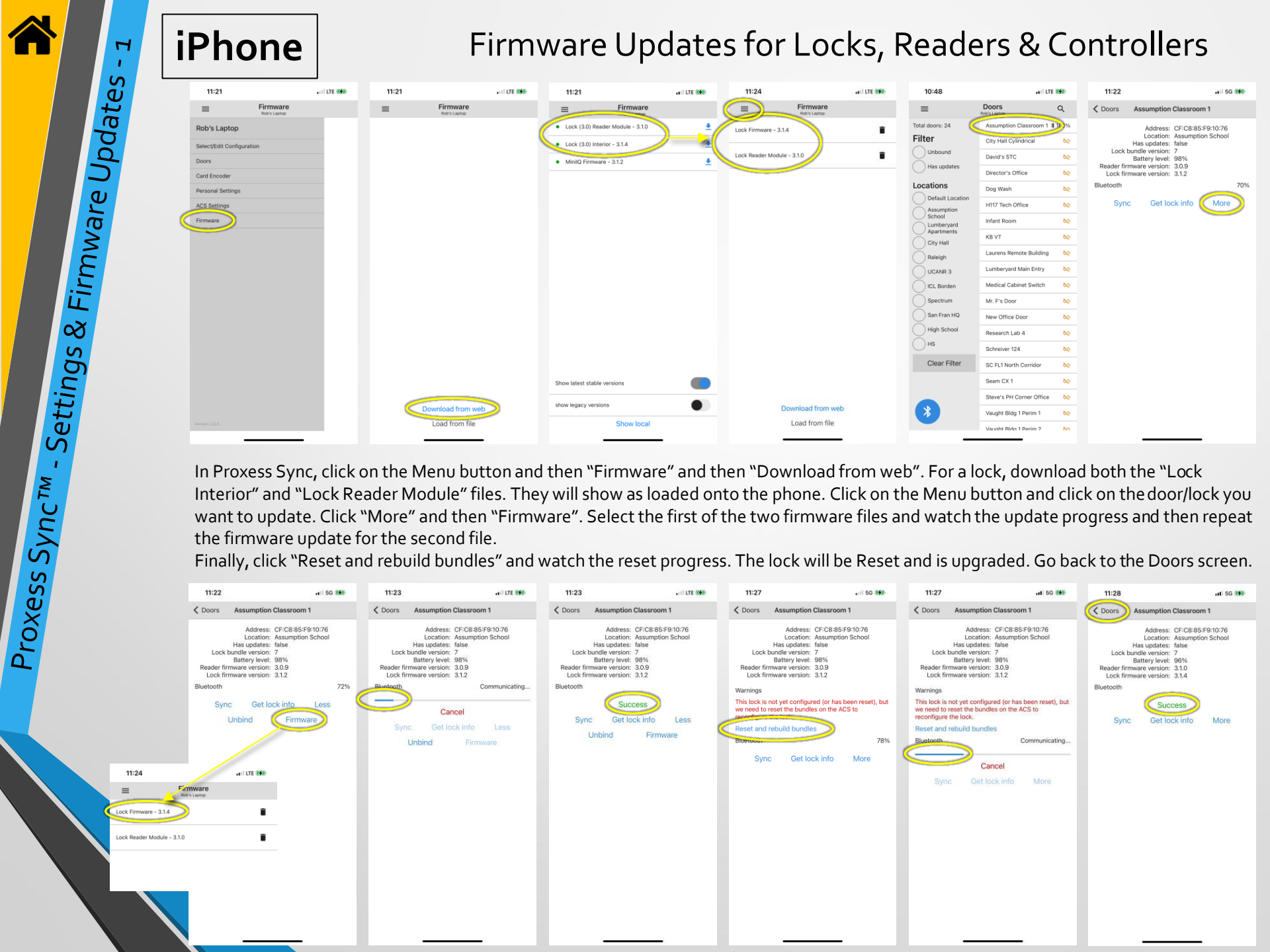


# MOBILE PHONE APP

## FIRMWARE UPDATES & SYNCHING

### with LOTS of DOORS AROUND

For both Apple & Android phones



# iPhone

# Firmware Updates for Locks, Readers & Controllers

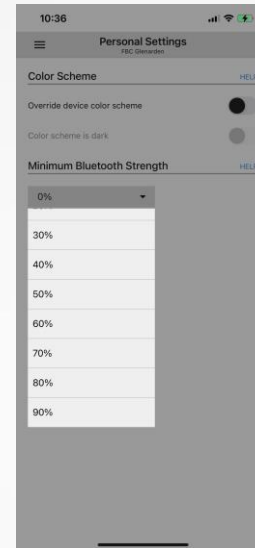
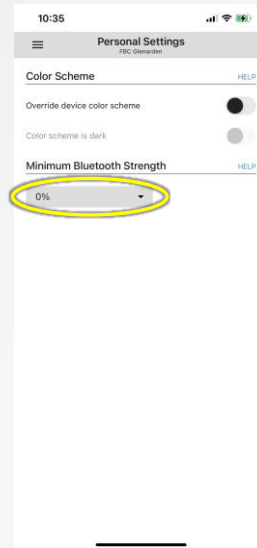
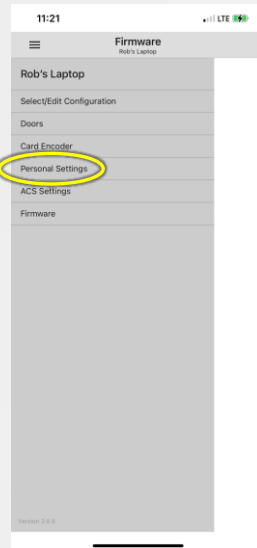
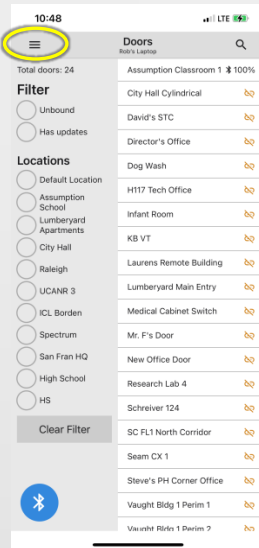
The first three screenshots show the initial steps of the firmware update process. The first screenshot shows the 'Firmware' menu selected in the app. The second screenshot shows the 'Download from web' option selected. The third screenshot shows the 'Lock (3.0) Reader Module - 3.1.0' and 'Lock (3.0) Interior - 3.1.4' files being downloaded. The fourth screenshot shows the 'Lock Reader Module - 3.1.0' file being downloaded. The fifth screenshot shows the 'Assumption Classroom 1' door selected for update. The sixth screenshot shows the 'More' button selected for the door.

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

The final three screenshots show the completion of the firmware update process. The seventh screenshot shows the 'Firmware' button selected for the door. The eighth screenshot shows the 'Success' message. The ninth screenshot shows the 'Reset and rebuild bundles' button selected. The tenth screenshot shows the 'Reset and rebuild bundles' button selected. The eleventh screenshot shows the 'Success' message. The twelfth screenshot shows the 'Reset and rebuild bundles' button selected.



# Synching When there are LOTS of Doors Around

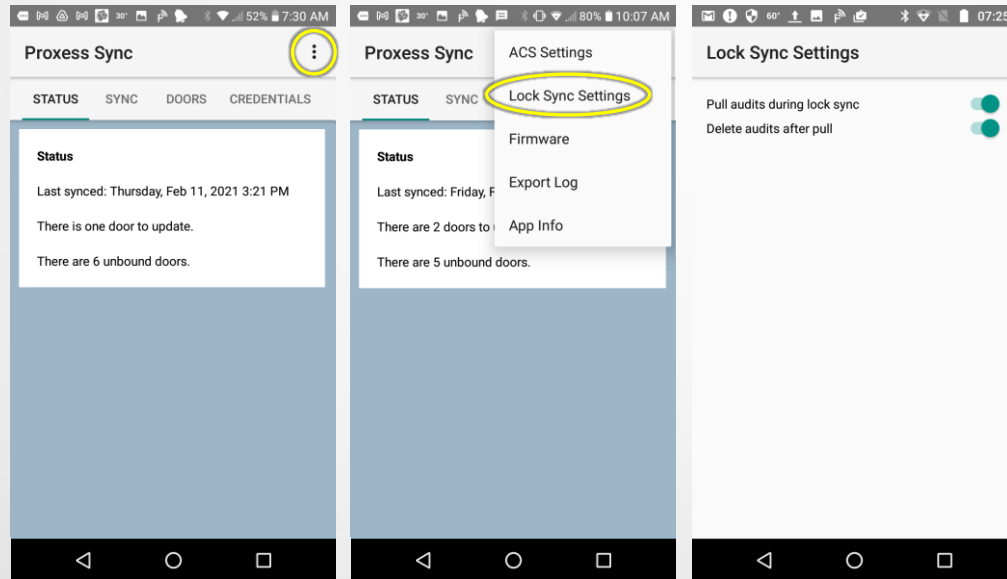


From the Home screen of the App, click on the icon highlighted in the image on the left; also known as the Menu or Hamburger button. The menu in the second image will appear. Click "PersonalSettings". The image on the right will open. The two features shown allow you to select the audit retrieval details 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.



# Android

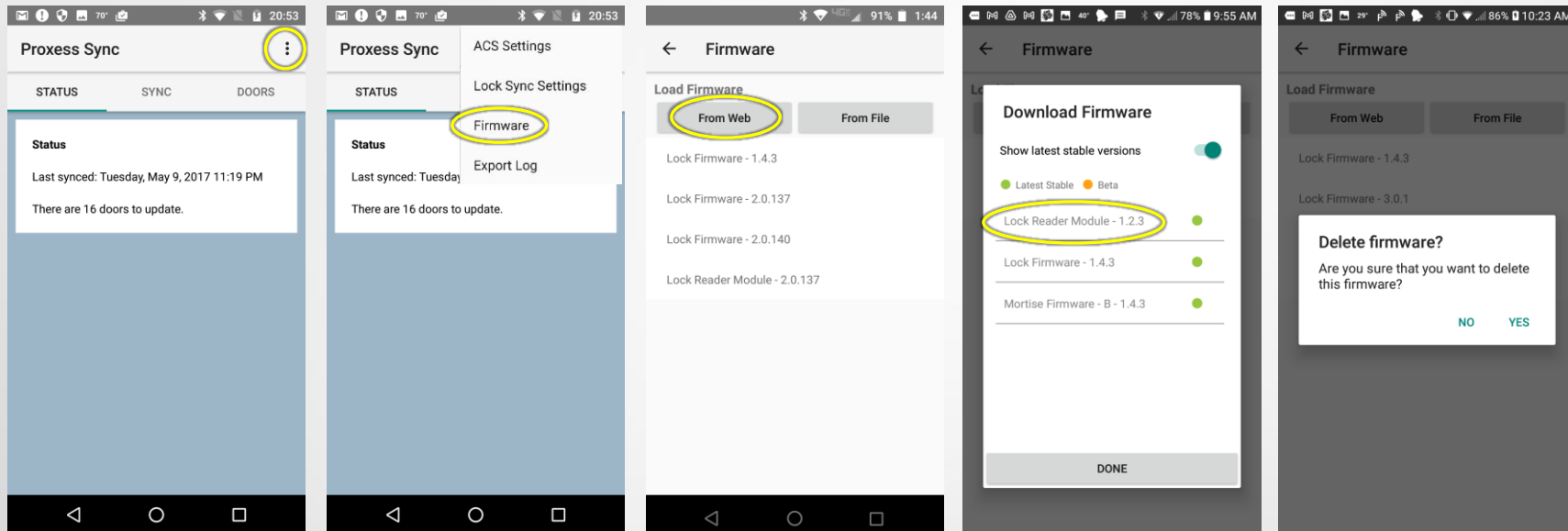
## Sync Settings



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



## Lockset Firmware Uploading (Preparation)



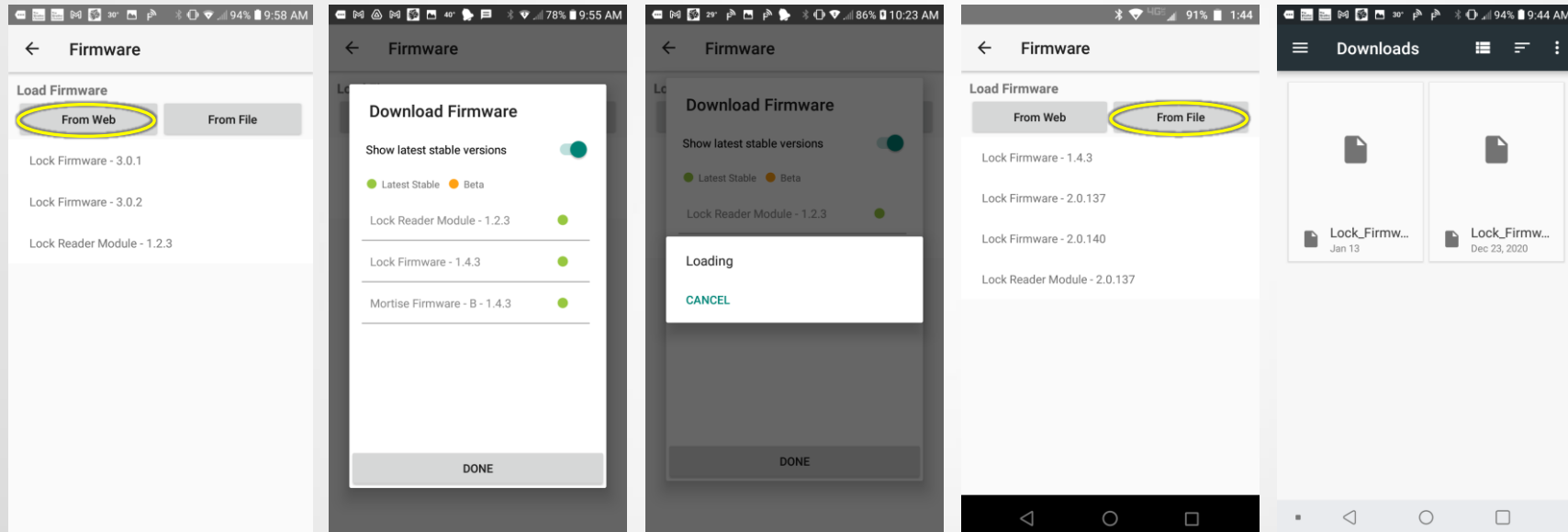
There are two (2) sets of firmware on each lockset, one for controller operations and one for the reader PC board.

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

To retrieve the latest versions, click the 3-dot icon highlighted above and then select "Firmware". If the file(s) you need have already been downloaded to the phone (as they will be shown in the above list), then you may just click on it to begin the download process to the lockset (only one file at a time may be downloaded). Once you are done with the firmware, or if there is an obsolete firmware shown in the list, you may press and hold that item and tap "Yes" when asked to delete that firmware version.



# Lockset Firmware Downloading – From Web & Device



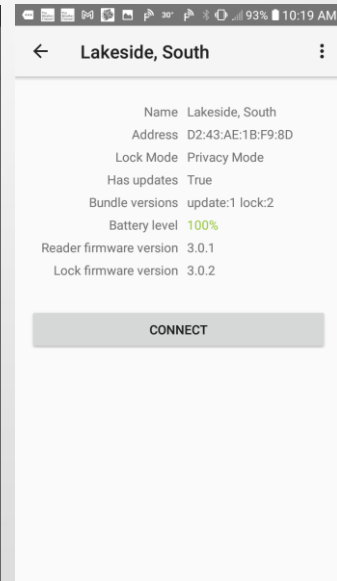
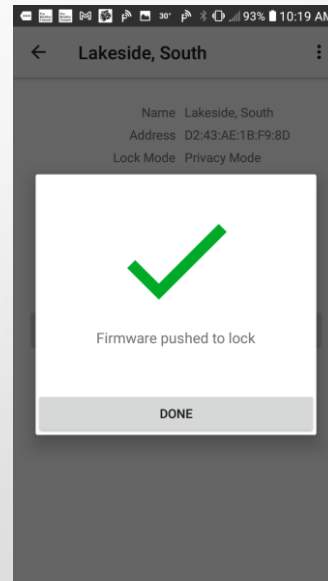
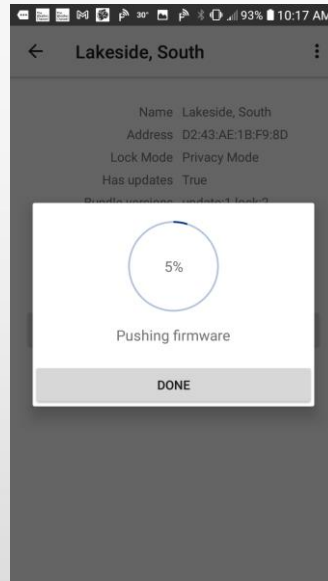
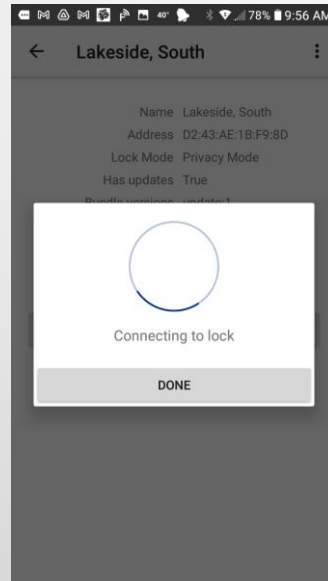
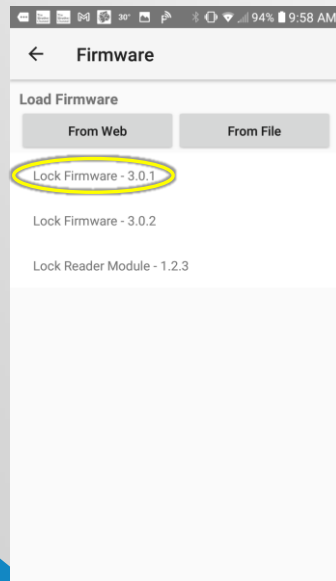
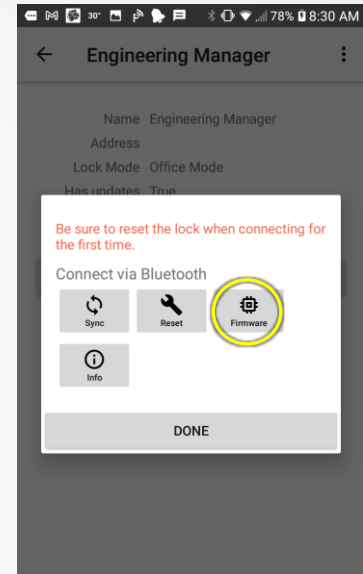
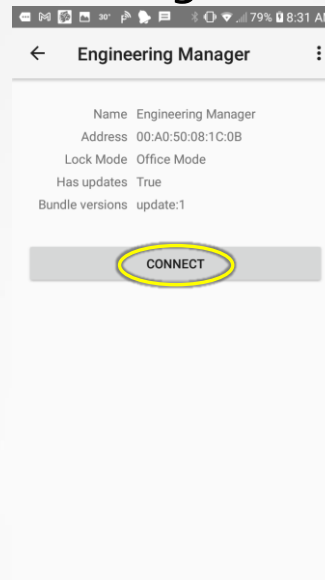
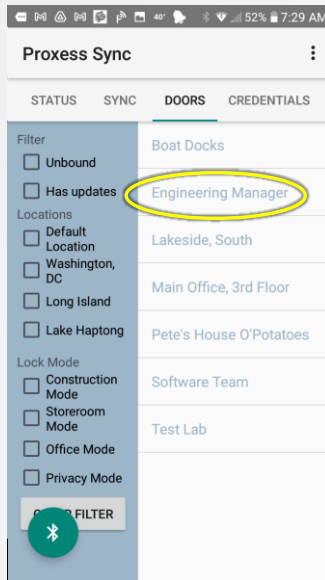
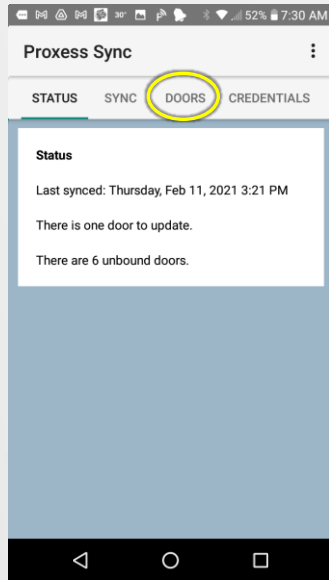
On the Settings-Firmware page, you may load firmware onto (the proper folder in) your device from either the Proxess website, or your device. To load firmware from the Proxess website, just tap “From Web” and the available firmware (that is Not already on your device) will be listed. If allowed, you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

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



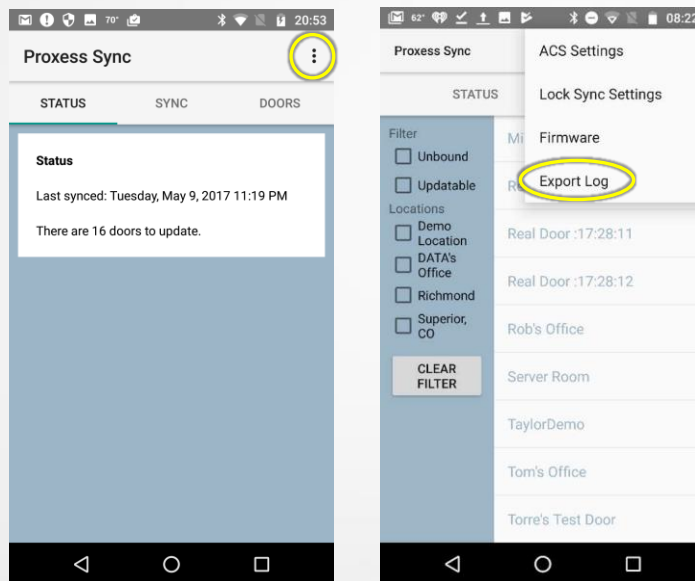


# Lockset Firmware Downloading (Execution)



To perform the lockset firmware update, select "Doors" from the top menu. Select the location in which the lockset is located and then select the door from the resulting list. Click "Connect" and then tap "Firmware". Select the firmware from the list you wish to update onto the lockset. The lockset will connect and begin pushing the firmware. When completed, the updated firmware versions and battery life will display. The lock will reset, returning it to Construction Mode and then must be re-synch'd using this app to work with the credentials programmed into this system.

## Proxess Sync App Message Log Export

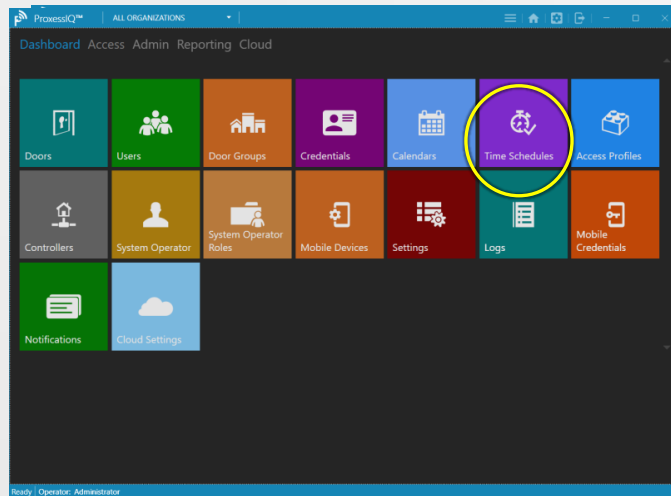


For advanced diagnostics, usually upon request from the Proxess Technical Support team, the Proxess Sync™ App maintains a support message log, which can be exported and emailed to Tech Support.

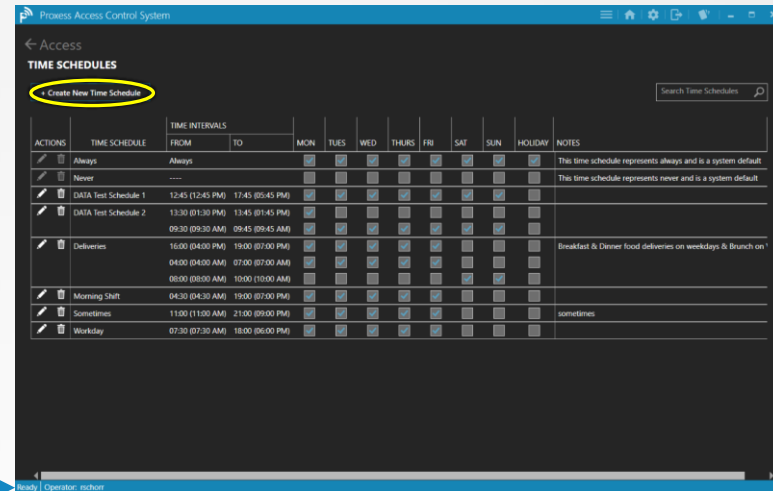
From the Home Screen of the App, click on the icon above and then click on “Export Log” from the resulting menu. Email the file that is downloaded into the phone’s file directory.



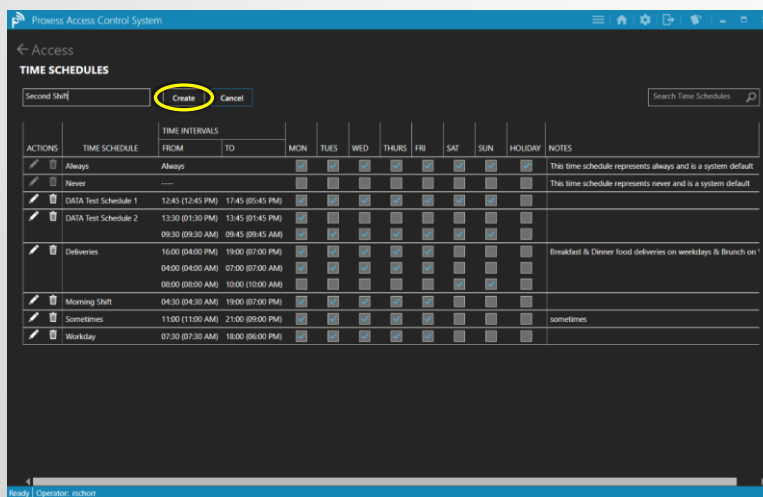
# TIME SCHEDULES



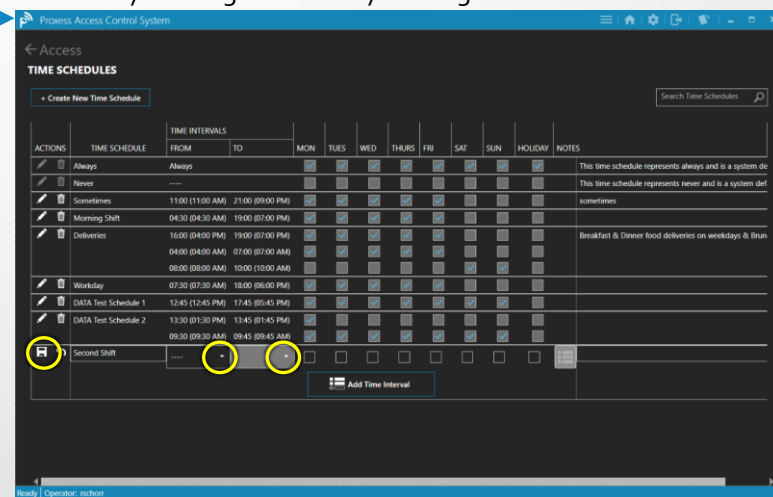
From the Home screen \ Dashboard, click "Time Schedules".



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.



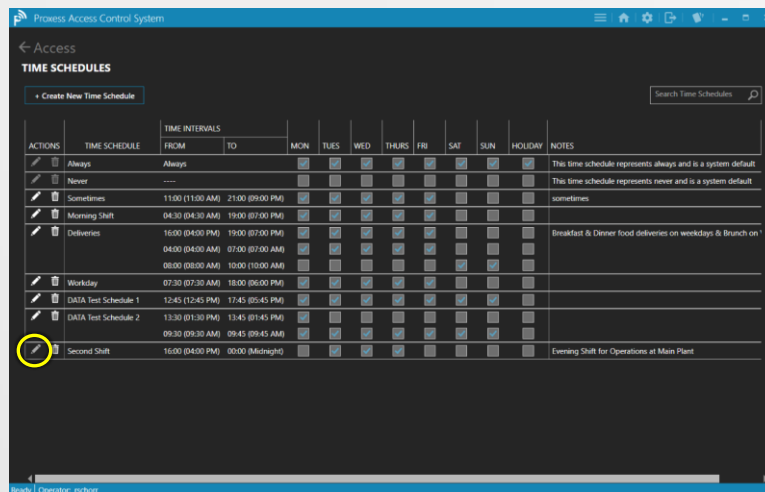
Type in a name for the new Time Schedule and click "Create".



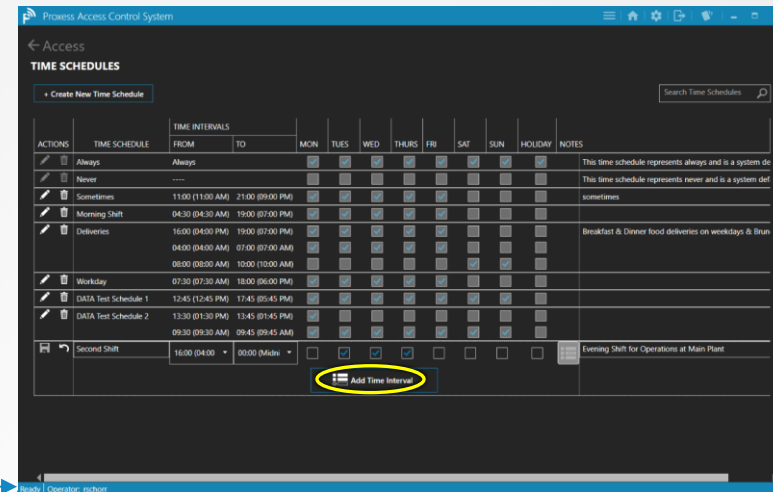
The new Time Schedule will appear at the bottom of the list. To select the overall time for it click the dropdown buttons for both the "From" and "To" columns. Select the days of the week in which this will be in effect and whether it will apply during Holidays. Optionally, add a note to describe the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



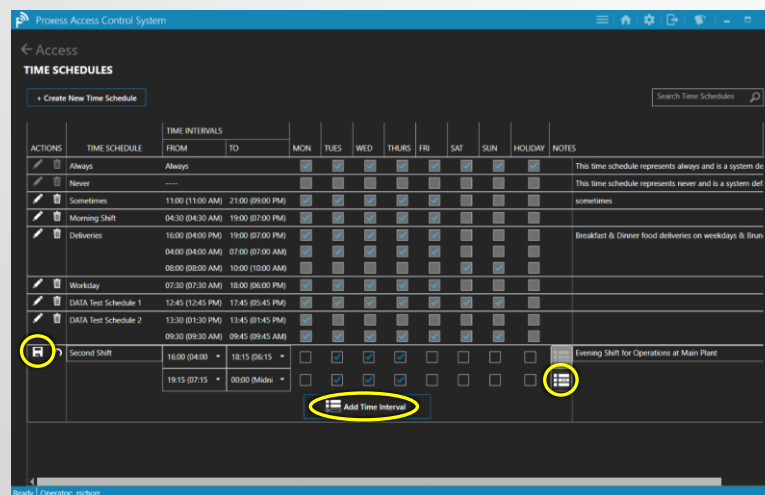
# Time Schedules - 2



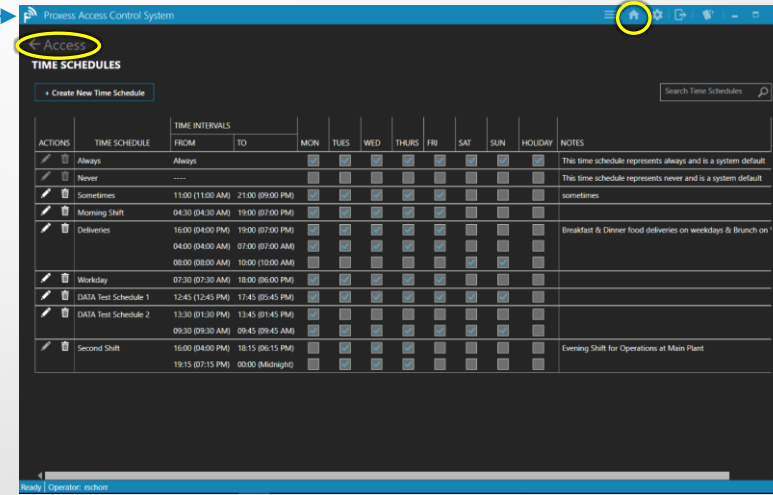
To make changes, or to add Time Intervals, click the Edit icon.



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.



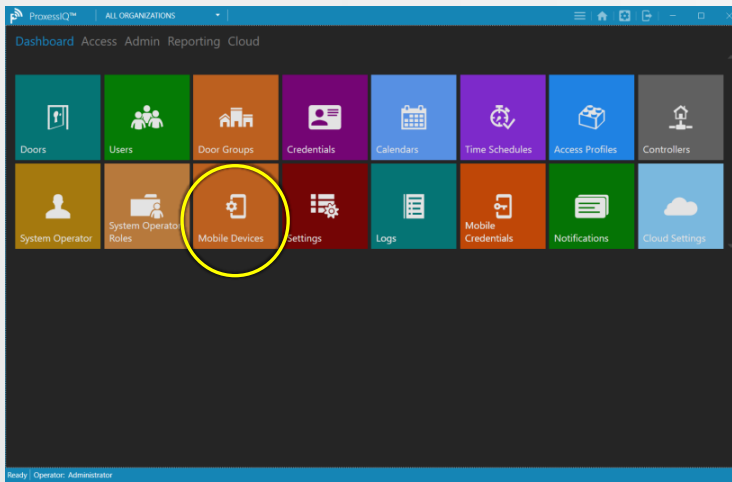
# DOOR GROUPS

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

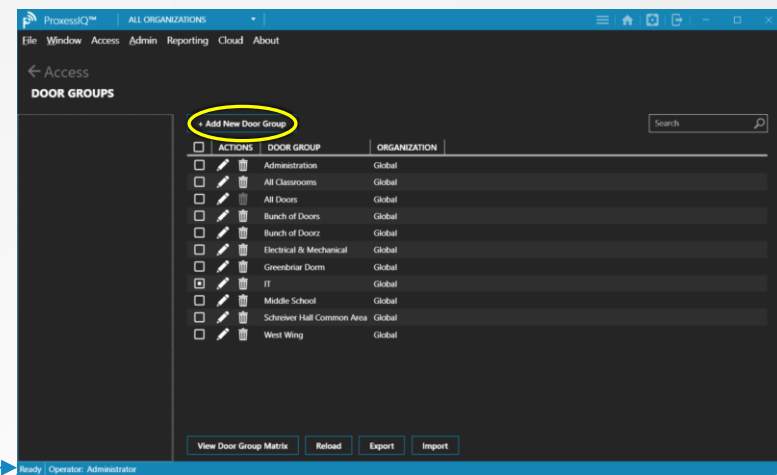
**[www.proxess.com/Proxess/media/Proxess/Documents/ProxessIQ-Manual-without-Hidden-Slides\\_3.pdf?ext=.pdf](http://www.proxess.com/Proxess/media/Proxess/Documents/ProxessIQ-Manual-without-Hidden-Slides_3.pdf?ext=.pdf)**



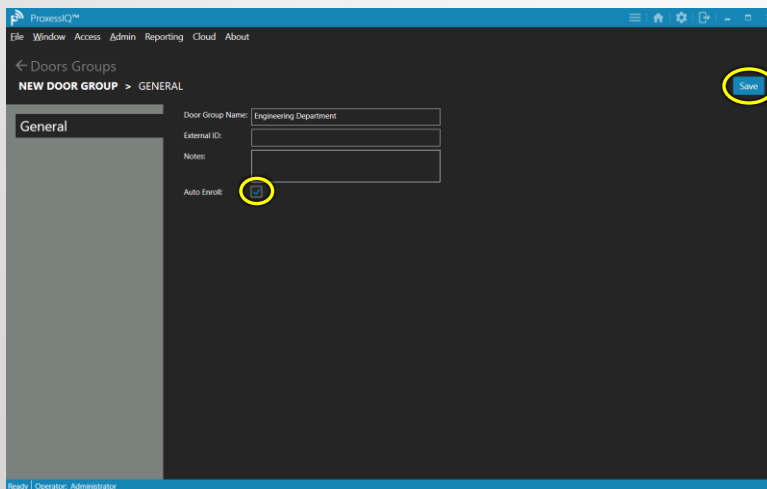
# Adding & Editing Door Groups - 1



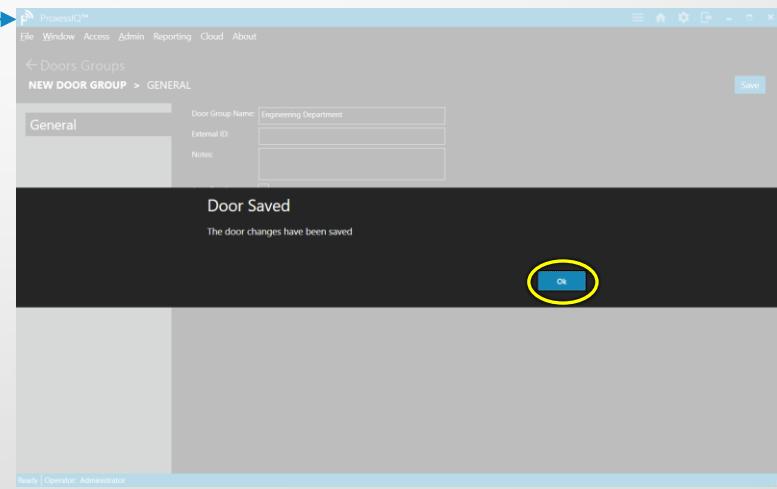
From the Home screen \ Dashboard, click "Door Groups". Before adding Door Groups, consider adding any custom Time Schedule and Access Profiles you desire.



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

ProvestIQ™  
File Window Access Admin Reporting Cloud About  
← Doors Groups  
ENGINEERING DEPARTMENT > GENERAL  
General  
Doors  
Door Group Name: Engineering Department  
External ID:  
Notes:  
Auto Enroll: ☒  
Save

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

ProvestIQ™  
File Window Access Admin Reporting Cloud About  
← Doors Groups  
ENGINEERING DEPARTMENT > DOORS  
General  
Doors  
Enter New Door  
Add  
ACTIONS DOORS  
Reload

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.

ProvestIQ™  
File Window Access Admin Reporting Cloud About  
← Doors Groups  
NEW DOOR GROUP > GENERAL  
General  
Door Group Name: Engineering Department  
External ID:  
Notes:  
Auto Enroll: ☒  
Save

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.

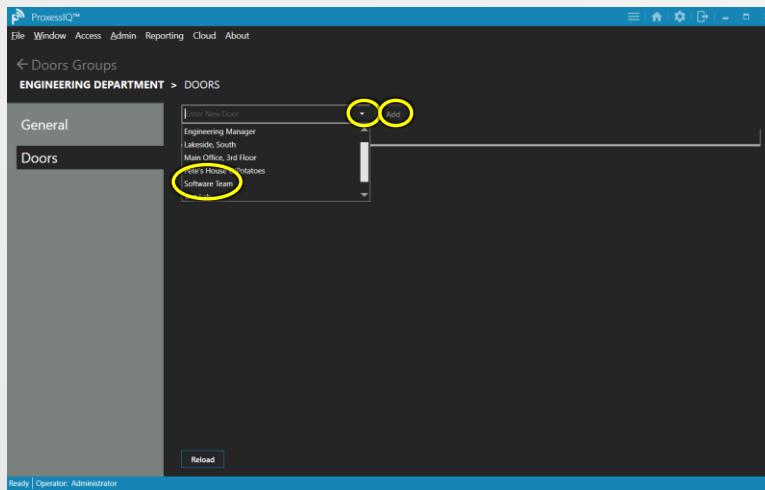
ProvestIQ™  
File Window Access Admin Reporting Cloud About  
← Doors Groups  
NEW DOOR GROUP > GENERAL  
General  
Door Group Name: Engineering Department  
External ID:  
Notes:  
Door Saved  
The door changes have been saved  
OK

Click on "OK".

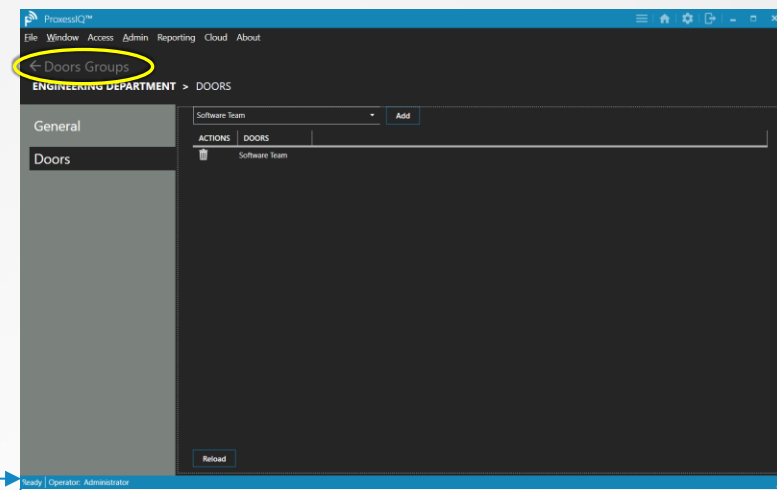




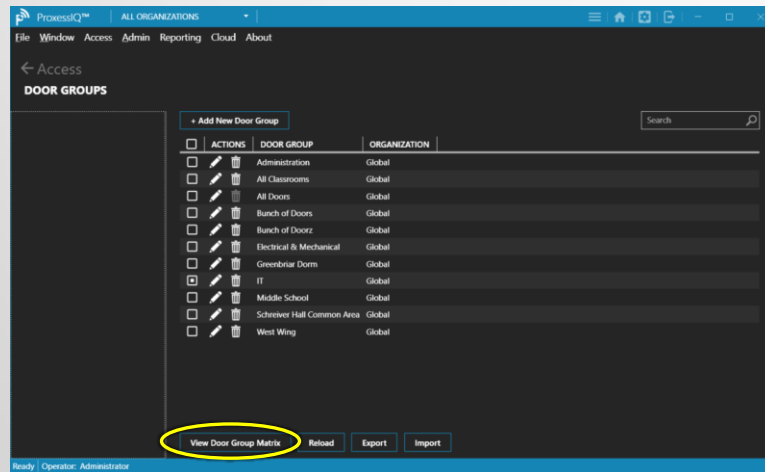
## Adding & Editing Door Groups - 3



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.

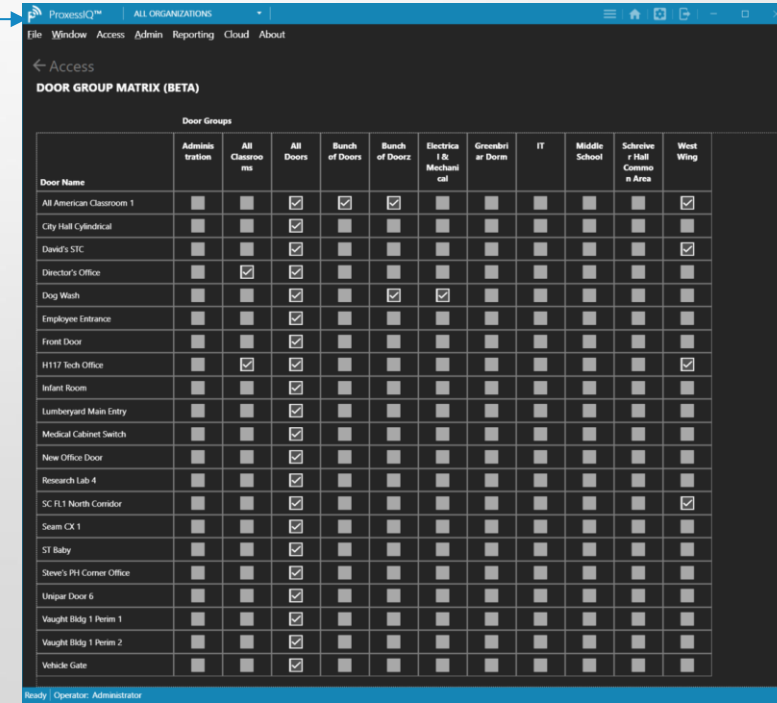


The door will now appear in this list. You can continue to add doors to this new Door Group and Delete doors from this group. Once you have added all the doors desired for this group, you may return to the main Door Groups screen.



Click the View Door Group Matrix button. The complete matrix of all your doors and Door Groups will appear, for verification of your programming efforts.

You may now return to programming in other sections of ProxessIQ.



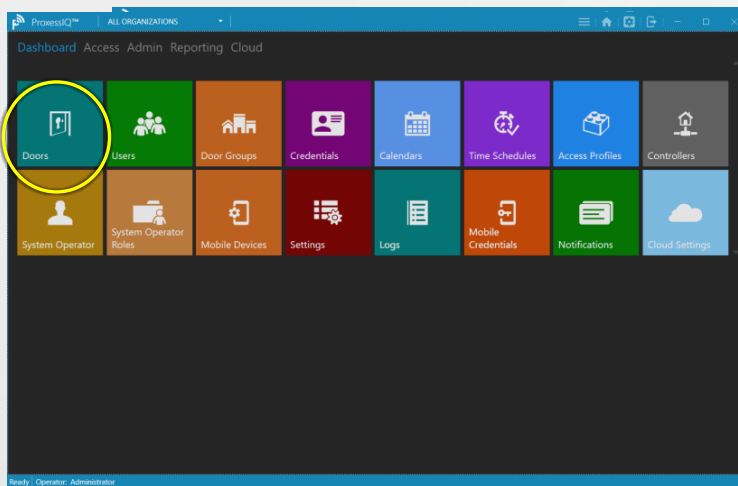


# DOORS

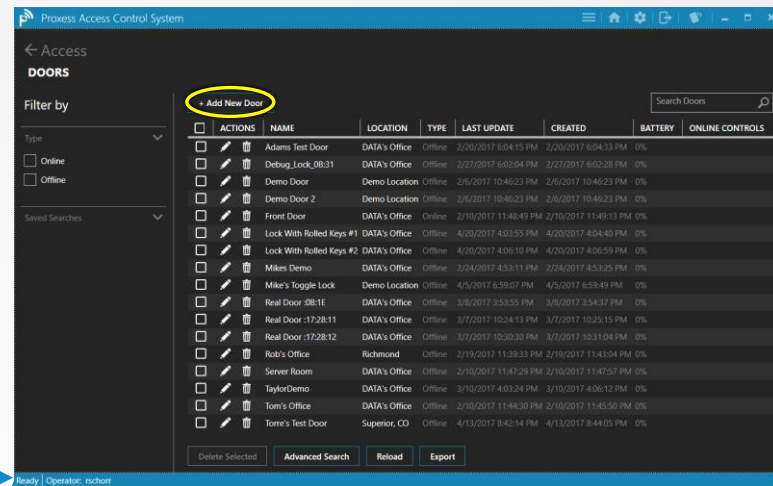
**Creating, Synchronizing & Configuring**



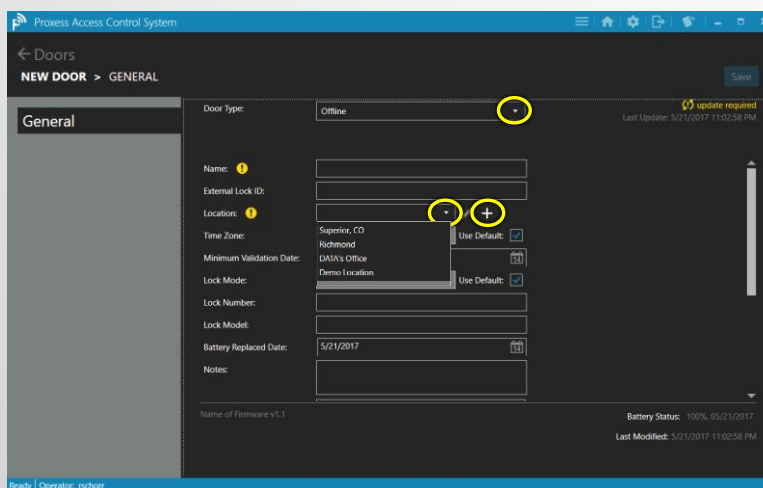
# Adding & Editing Doors - 1



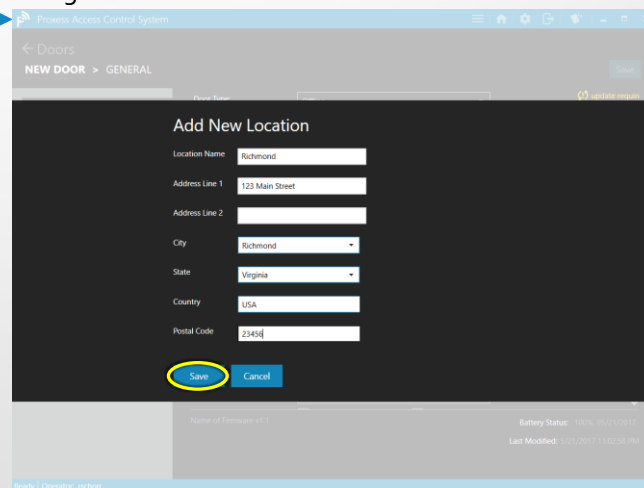
From the Home screen \ Dashboard, click "Doors". Before adding Doors, consider adding any custom Time Schedule and Access Profiles you desire.



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



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



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



## Adding & Editing Doors - 2

Proxess Access Control System

← Doors

NEW DOOR > GENERAL

Door Type: Offline

Last Update: 5/21/2017 11:02:38 PM

General

Name: [Field]

External Lock ID: [Field]

Location: [Field]

Time Zone: US/Mountain

Minimum Validation Date: 5/21/2017

Lock Mode: Starexroom Mode

Lock Number: [Field]

Lock Model: [Field]

Battery Replaced Date: 5/21/2017

Notes: [Field]

Holiday Calendar: [Field]

Unlock Schedule: [Field]

First Person In: [Field]

Allow Toggle Schedule: [Field]

Card Only Schedule: [Field]

Momentary Unlock Time: [Field]

Momentary Unlock Time Ext: [Field]

Save

Name of Firmware v1.1

Battery Status: 100% 02/19/2017

Last Modified: 5/21/2017 11:02:38 PM

Ready | Operator: rishort

Proxess Access Control System

← Doors

ROB'S OFFICE > GENERAL

Door Type: Offline

Last Update: 2/19/2017 11:39:33 PM

General

Name: Rob's Office

External Lock ID: [Field]

Location: Richmond

Time Zone: US/Mountain

Minimum Validation Date: 2/19/2017

Lock Mode: Starexroom Mode

Lock Number: [Field]

Lock Model: [Field]

Battery Replaced Date: 2/19/2019

Notes: No Door Controller, yet

Save

Name of Firmware v1.1

Battery Status: 100% 02/19/2017

Last Modified: 6/9/2017 12:36:54 AM

Ready | Operator: rishort

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

Proxess Access Control System

← Access

DOORS

Filter by

Type

Online

Offline

Save Searches

+ Add New Door

Search Doors

ACTIONS	NAME	LOCATION	TYPE	LAST UPDATE	CREATED	BATTERY	ONLINE CONTROLS
[Icon]	Adams Test Door	DATA's Office	Offline	2/20/2017 6:04:15 PM	2/20/2017 6:04:15 PM	0%	
[Icon]	Debug Lock 08-31	DATA's Office	Offline	2/27/2017 6:02:04 PM	2/27/2017 6:02:28 PM	0%	
[Icon]	Demo Door	Demo Location	Offline	2/6/2017 10:46:23 PM	2/6/2017 10:46:23 PM	0%	
[Icon]	Demo Door 2	Demo Location	Offline	2/6/2017 10:46:23 PM	2/6/2017 10:46:23 PM	0%	
[Icon]	Front Door	DATA's Office	Online	2/10/2017 11:48:49 PM	2/10/2017 11:49:13 PM	0%	
[Icon]	Lock With Rolled Keys #1	DATA's Office	Offline	4/20/2017 4:05:55 PM	4/20/2017 4:04:40 PM	0%	
[Icon]	Lock With Rolled Keys #2	DATA's Office	Offline	4/20/2017 4:06:10 PM	4/20/2017 4:06:59 PM	0%	
[Icon]	Mikes Demo	DATA's Office	Offline	2/24/2017 4:53:11 PM	2/24/2017 4:53:25 PM	0%	
[Icon]	Mike's Toggle Lock	Demo Location	Offline	4/5/2017 6:59:07 PM	4/5/2017 6:59:49 PM	0%	
[Icon]	Real Door 08-1E	DATA's Office	Offline	3/8/2017 3:53:55 PM	3/8/2017 3:54:37 PM	0%	
[Icon]	Real Door :17-28-11	DATA's Office	Offline	3/7/2017 10:24:13 PM	3/7/2017 10:25:15 PM	0%	
[Icon]	Real Door :17-28-12	DATA's Office	Offline	3/7/2017 10:30:30 PM	3/7/2017 10:31:04 PM	0%	
[Icon]	Rob's Office	Richmond	Offline	2/19/2017 11:39:33 PM	2/19/2017 11:43:04 PM	0%	
[Icon]	Server Room	DATA's Office	Offline	2/10/2017 11:47:29 PM	2/10/2017 11:47:57 PM	0%	
[Icon]	Taylor Demo	DATA's Office	Offline	3/10/2017 4:03:24 PM	3/10/2017 4:06:12 PM	0%	
[Icon]	Tom's Office	DATA's Office	Offline	2/10/2017 11:44:30 PM	2/10/2017 11:45:50 PM	0%	
[Icon]	Tom's Test Door	Superior, CO	Offline	4/13/2017 8:42:14 PM	4/13/2017 8:44:05 PM	0%	

Delete Selected

Advanced Search

Reload

Export

Ready | Operator: rishort

Click "Advanced Search".

Proxess Access Control System

← Access

DOORS

Filter by

Type

Online

Offline

Save Searches

Advanced Search

Name

Update Required

Lock Model

Calendar

Unlock Schedule

Toggle Schedule

Card Only Schedule

First Person In

Last Update Date Time

Minimum Validation Date

Battery Last Changed

Battery Status Last Updated

Installation Date

Is equal to

Starts with

Ends with

AND (Exclusive)

OR (Inclusive)

Save

LOCATION	TYPE	LAST UPDATE	CREATED	BATTERY	ONLINE CONTROLS
DATA's Office	Offline	2/20/2017 6:04:15 PM	2/20/2017 6:04:15 PM	0%	
DATA's Office	Offline	2/27/2017 6:02:04 PM	2/27/2017 6:02:28 PM	0%	
Office Tower II	Offline	2/6/2017 10:46:23 PM	2/6/2017 10:46:23 PM	0%	
DATA's Office	Online	2/10/2017 11:48:49 PM	2/10/2017 11:49:13 PM	0%	
#1 DATA's Office	Offline	4/20/2017 4:05:55 PM	4/20/2017 4:04:40 PM	0%	
#2 DATA's Office	Offline	4/20/2017 4:06:10 PM	4/20/2017 4:06:59 PM	0%	
Mikes Demo	DATA's Office	2/24/2017 4:53:11 PM	2/24/2017 4:53:25 PM	0%	
Mike's Toggle Lock	Demo Location	4/5/2017 6:59:07 PM	4/5/2017 6:59:49 PM	0%	
Proxess Test Door	Proxess	6/28/2017 10:33:42 PM	6/28/2017 10:35:30 PM	0%	

Delete Selected

Reload

Export

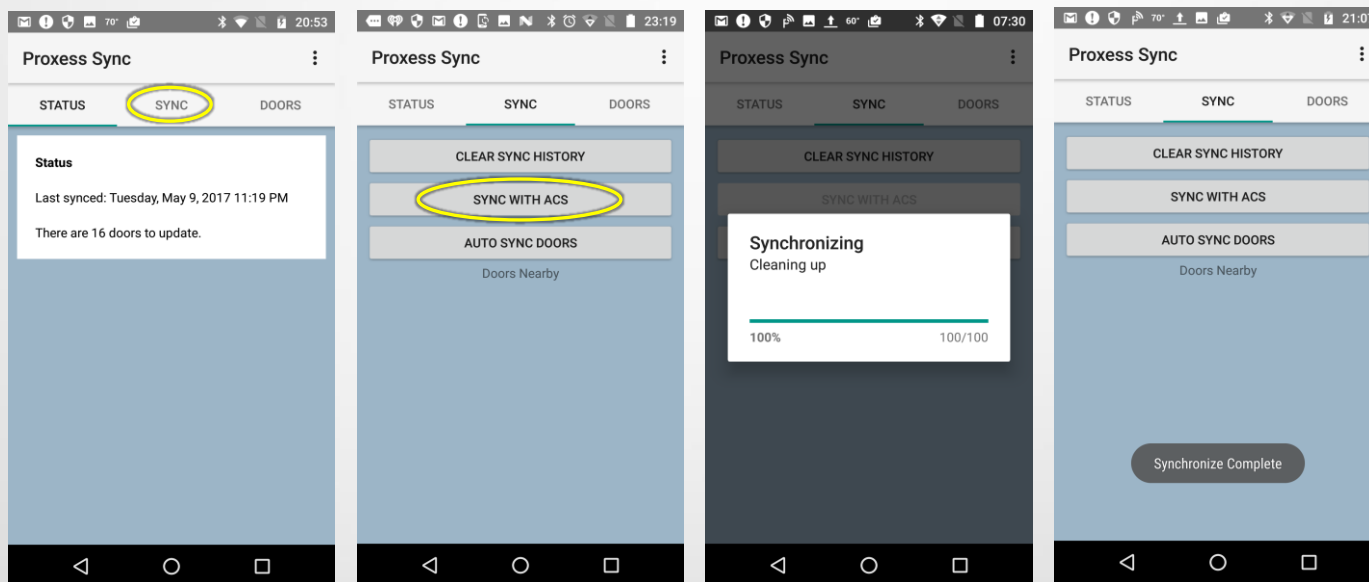
Ready | Operator: rishort

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.



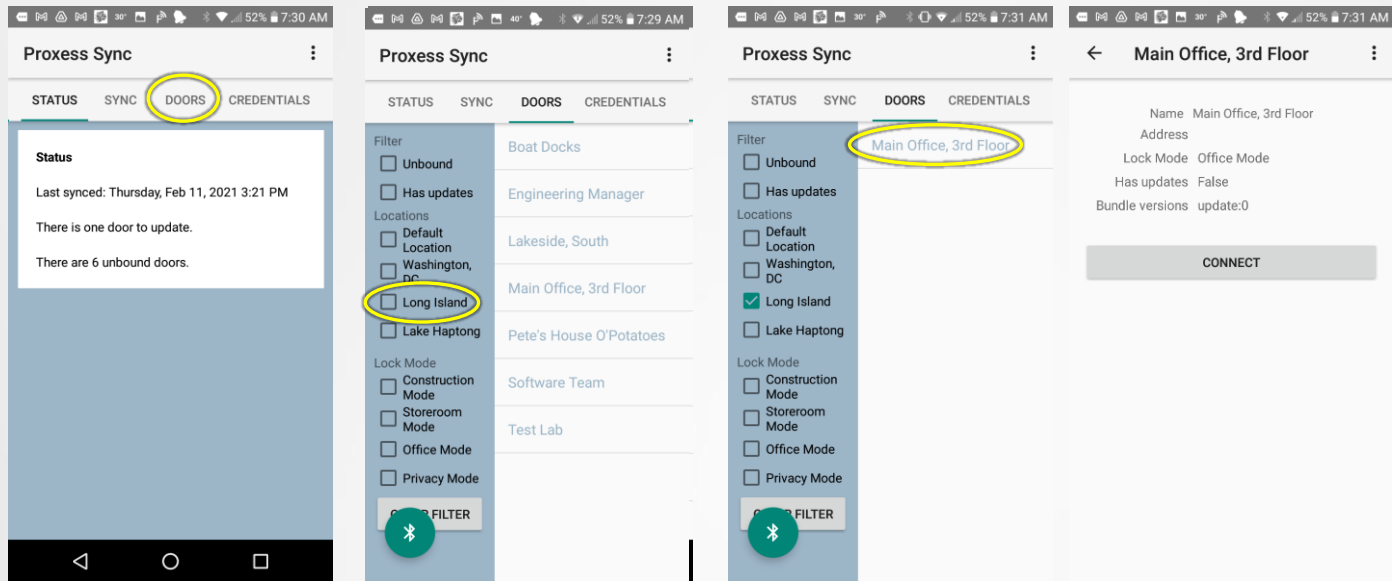
## Initialize a Lockset (1 of 2)

**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.**

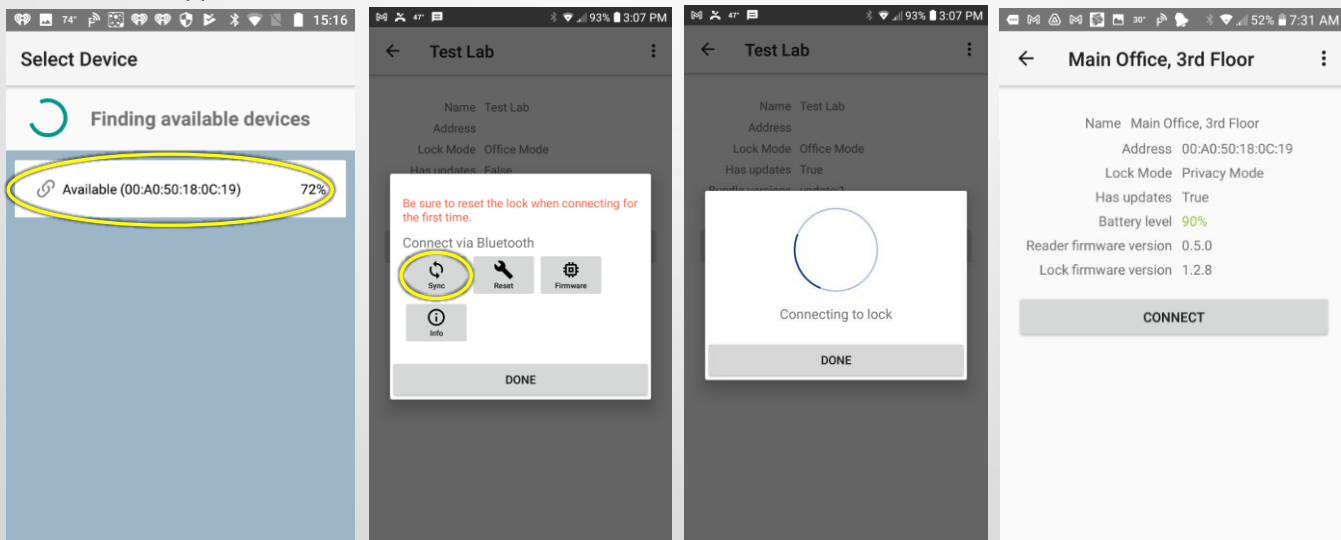


To perform any desired updates on the locksets, updates first need to be delivered to this phone. At this point, the phone does not need to be near any lockset. Open the Proxess Sync™ mobile App and click "Sync" from the top menu. The second screen above appears. Click "Sync with ACS" and the status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

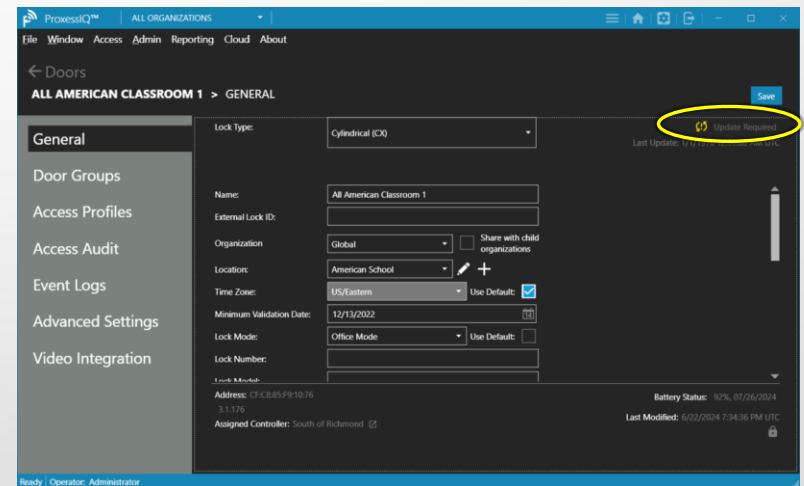
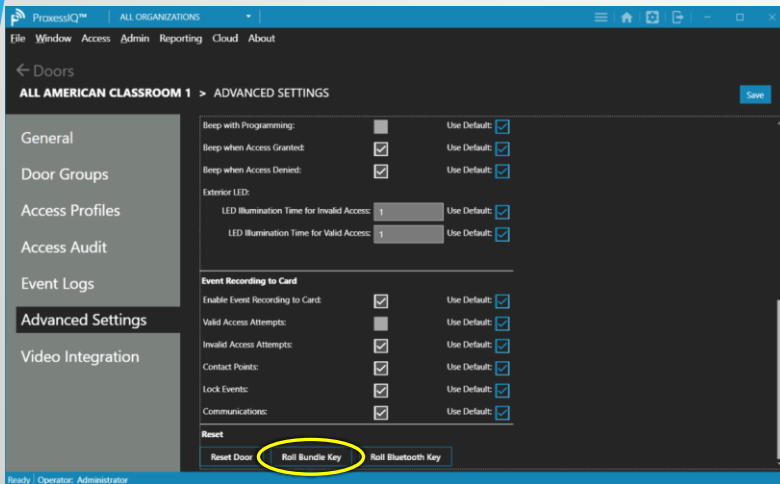
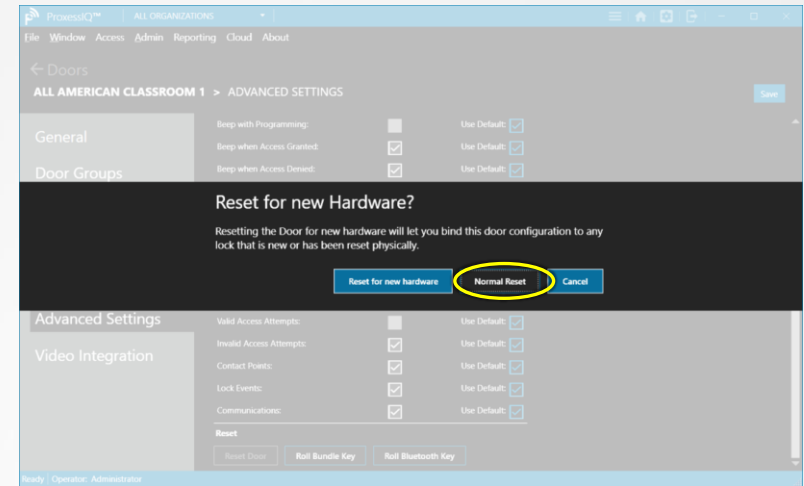
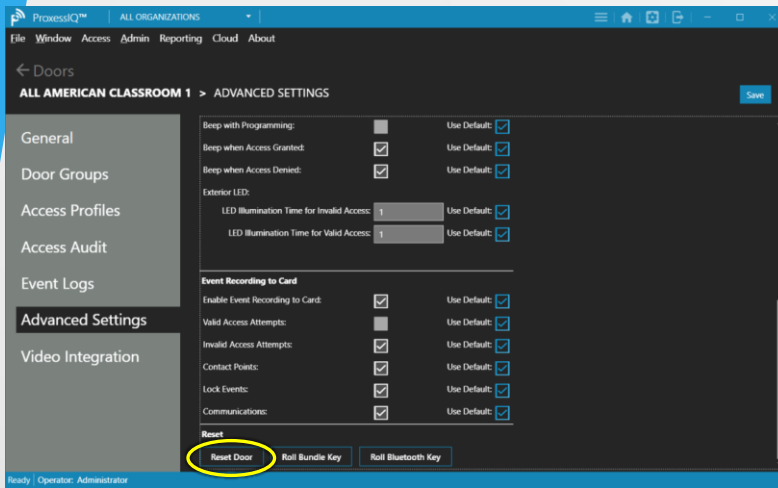
## Initialize a Lockset (2 of 2)



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".



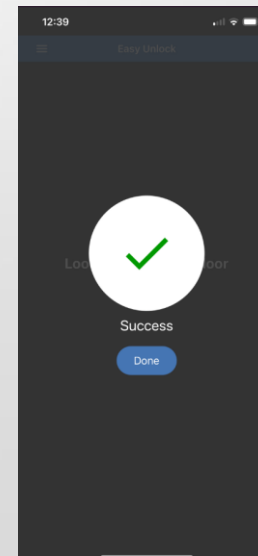
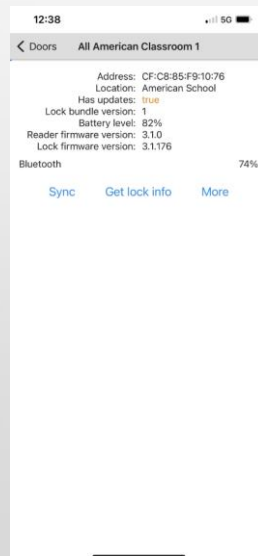
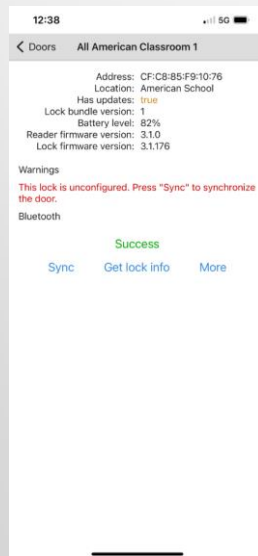
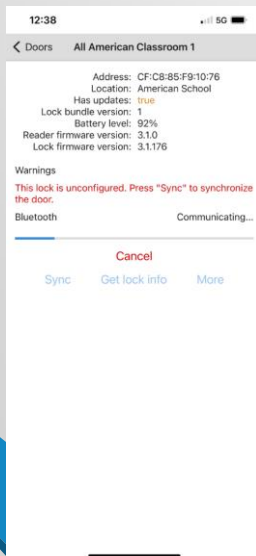
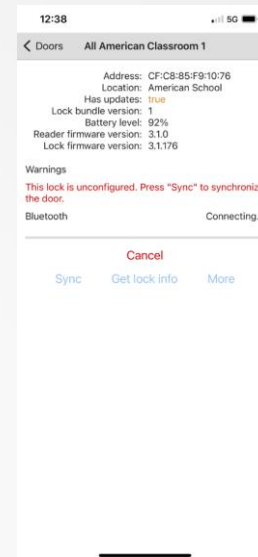
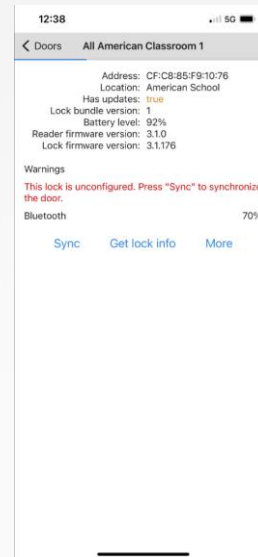
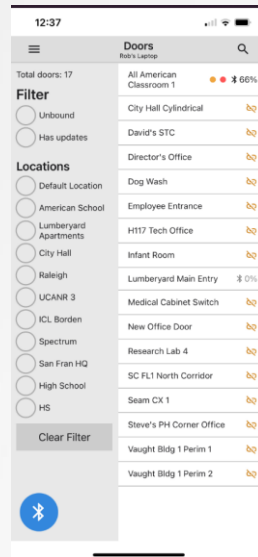
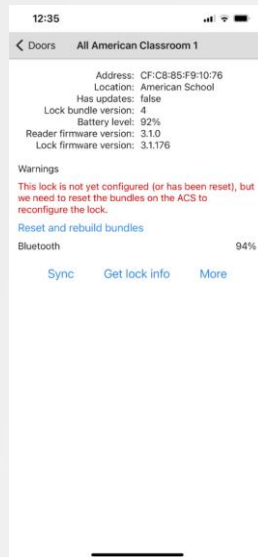
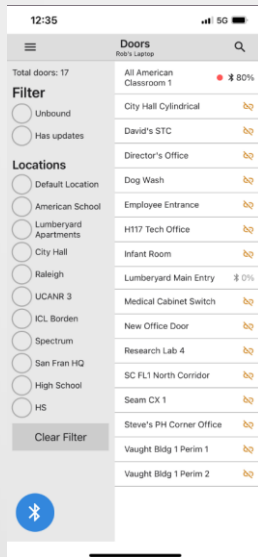
If the select device screen appears, click on the device with the greatest signal strength. Click the "Sync" button and once initialized, the battery level and firmware version for the lock's boards will display. The initialization is complete and you may return to other screens in the App or simply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











ProcessIQ™ | ALL ORGANIZATIONS

File Window Access Admin Reporting Cloud About

← Doors

ALL AMERICAN CLASSROOM 1 > GENERAL

Save

General

Door Groups

Access Profiles

Access Audit

Event Logs

Advanced Settings

Video Integration

Lock Type: Cylindrical (CX) Last Update: 6/9/2024 4:38:15 PM UTC

Name: All American Classroom 1

External Lock ID:

Organization: Global ☐ Share with child organizations

Location: American School

Time Zone: US/Eastern Use Default: ☒

Minimum Validation Date: 12/13/2022

Lock Mode: Office Mode Use Default: ☐

Lock Number:

Lock Model:

Address: C:\BMS\F91076 3.1.176 Battery Status: 82% 06/09/2024

Assigned Controller: South of Richmond Last Modified: 6/22/2024 7:34:36 PM UTC

Ready Operator: Administrator

ProcessIQ™ | ALL ORGANIZATIONS

File Window Access Admin Reporting Cloud About

← Access

DOORS

Filter by

+ Add New Door

Search Doors

	ACTIONS	NAME	LOCATION	TYPE	BATTERY	UPDATES	ONLINE CONTROLS
<input type="checkbox"/>		All American Classroom 1	American School	Cylindrical (CX)	82%	<input type="checkbox"/>	
<input type="checkbox"/>		City Hall Cylindrical	City Hall	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		Dave's STC	Default Location	Switch™ Tech Core	0%	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		Director's Office	Default Location	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		Dog Wash	Default Location	Cylindrical (CX)	100%	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		Employee Entrance	City Hall	Exit Device Trim	0%	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		Front Door	Default Location	Online Controller (BoatQ)		<input checked="" type="checkbox"/>	
<input type="checkbox"/>		H117 Tech Office	High School	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		Infant Room	Default Location	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		Lumberyard Main Entry	Lumberyard Apartments	Reader Controller (Max-IC)		<input type="checkbox"/>	
<input type="checkbox"/>		Medical Cabinet Switch	Default Location	Switch™ Tech Core	0%	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		New Office Door	Lumberyard Apartments	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		Research Lab 4	UCANR 3	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		SC F11 North Corridor	Spectrum	Mortise (MO)	0%	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		Seam CX 1	San Fran HQ	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		STC Bldg	City Hall	Switch™ Tech Core	0%	<input checked="" type="checkbox"/>	

Delete Selected Advanced Search Reload Export Import Global Lockdown

Ready Operator: Administrator



# Adding & Editing Doors - 5

ACTIONS	NAME	LOCATION	TYPE	LAST UPDATE	CREATED	BATTERY	ONLINE
<input type="checkbox"/>	Rob's Office	Richmond	Offline	2/19/2017 11:39:33 PM	2/19/2017 11:43:04 PM	0%	
<input type="checkbox"/>	Real Door :1728:11	DATA's Office	Offline	3/7/2017 10:24:13 PM	3/7/2017 10:25:15 PM	0%	
<input type="checkbox"/>	Real Door :1728:12	DATA's Office	Offline	3/7/2017 10:30:30 PM	3/7/2017 10:31:04 PM	0%	
<input type="checkbox"/>	Real Door :08:1E	DATA's Office	Offline	3/8/2017 3:53:55 PM	3/8/2017 3:54:37 PM	0%	

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".

ACTIONS	NAME	LOCATION	TYPE	LAST UPDATE	CREATED	BATTERY	ONLINE
<input type="checkbox"/>	Rob's Office	Richmond	Offline	2/19/2017 11:39:33 PM	2/19/2017 11:43:04 PM	0%	
<input type="checkbox"/>	Real Door :1728:11	DATA's Office	Offline	3/7/2017 10:24:13 PM	3/7/2017 10:25:15 PM	0%	
<input type="checkbox"/>	Real Door :1728:12	DATA's Office	Offline	3/7/2017 10:30:30 PM	3/7/2017 10:31:04 PM	0%	
<input type="checkbox"/>	Real Door :08:1E	DATA's Office	Offline	3/8/2017 3:53:55 PM	3/8/2017 3:54:37 PM	0%	

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

ACTIONS	NAME	LOCATION	TYPE	LAST UPDATE	CREATED	BATTERY	ONLINE
<input type="checkbox"/>	Rob's Office	Richmond	Offline	2/19/2017 11:39:33 PM	2/19/2017 11:43:04 PM	0%	
<input type="checkbox"/>	Real Door :1728:11	DATA's Office	Offline	3/7/2017 10:24:13 PM	3/7/2017 10:25:15 PM	0%	
<input type="checkbox"/>	Real Door :1728:12	DATA's Office	Offline	3/7/2017 10:30:30 PM	3/7/2017 10:31:04 PM	0%	
<input type="checkbox"/>	Real Door :08:1E	DATA's Office	Offline	3/8/2017 3:53:55 PM	3/8/2017 3:54:37 PM	0%	

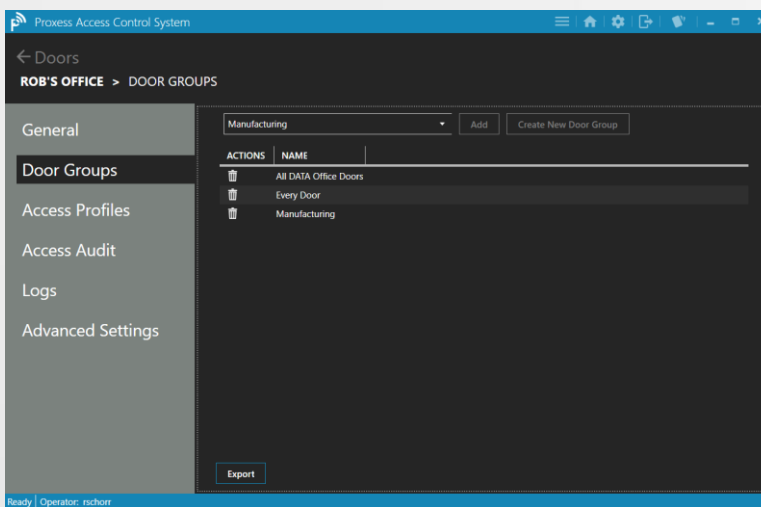
Click the "Door Groups" tab. Note that you may also add Door Groups from the Door Groups menu on the Home page.

ACTIONS	NAME	LOCATION	TYPE	LAST UPDATE	CREATED	BATTERY	ONLINE
<input type="checkbox"/>	Rob's Office	Richmond	Offline	2/19/2017 11:39:33 PM	2/19/2017 11:43:04 PM	0%	
<input type="checkbox"/>	Real Door :1728:11	DATA's Office	Offline	3/7/2017 10:24:13 PM	3/7/2017 10:25:15 PM	0%	
<input type="checkbox"/>	Real Door :1728:12	DATA's Office	Offline	3/7/2017 10:30:30 PM	3/7/2017 10:31:04 PM	0%	
<input type="checkbox"/>	Real Door :08:1E	DATA's Office	Offline	3/8/2017 3:53:55 PM	3/8/2017 3:54:37 PM	0%	

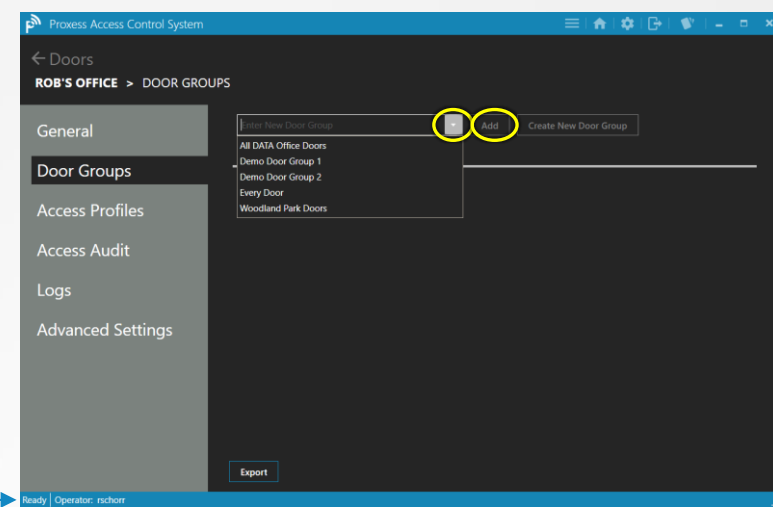
To add a new Door Group, type the name you want in the "Enter New Door Group" field and then click the "Create New Door Group" icon.



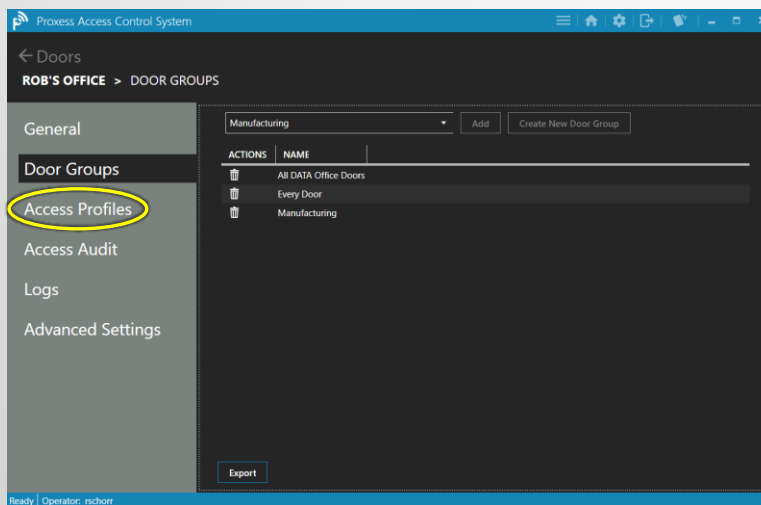
## Adding & Editing Doors - 6



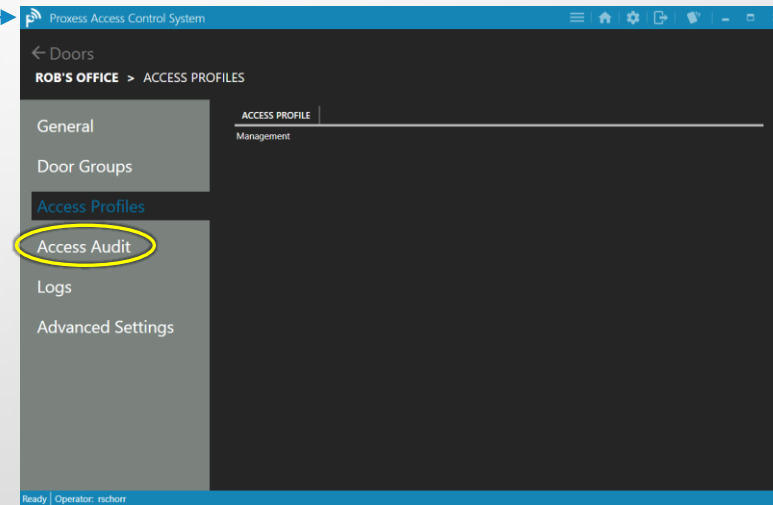
The new Door Group you have created will appear in the list for that Door and will become available to all other Doors in the system.



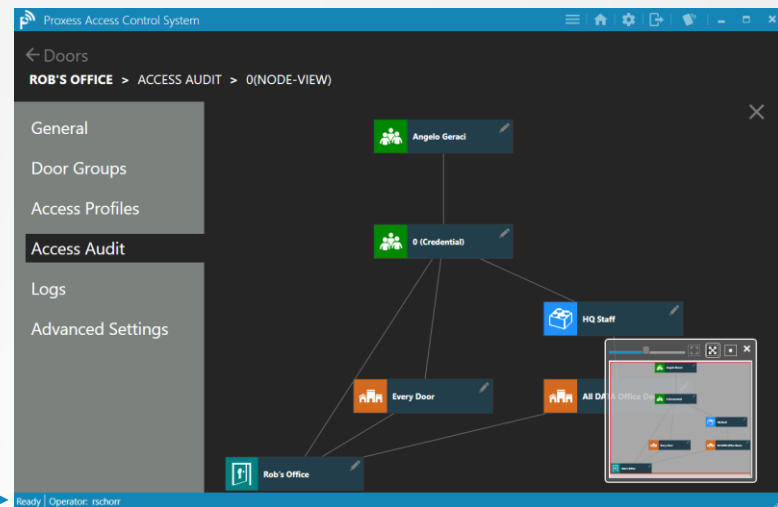
To add a Door Group for this Door to belong, click the dropdown icon and select a Door Group. Then click "Add". You can add a Door to as many Door Groups as you want.



Click the "Access Profiles" tab.



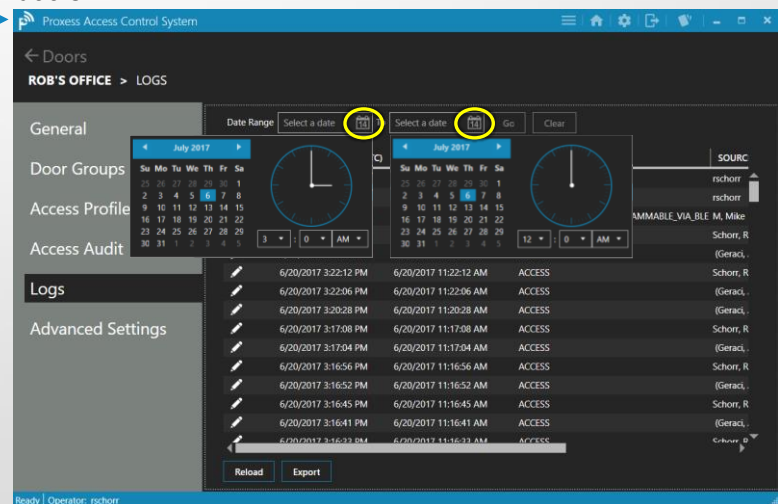
Any Access Profile that this Door is a part of will appear in this list. It is not necessary for a Door to be part of an Access Profile. If there is no Door listed, you may go back to the Dashboard \ Home Screen and click on the "Access Profiles" module to add this Door to an existing Access Profile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



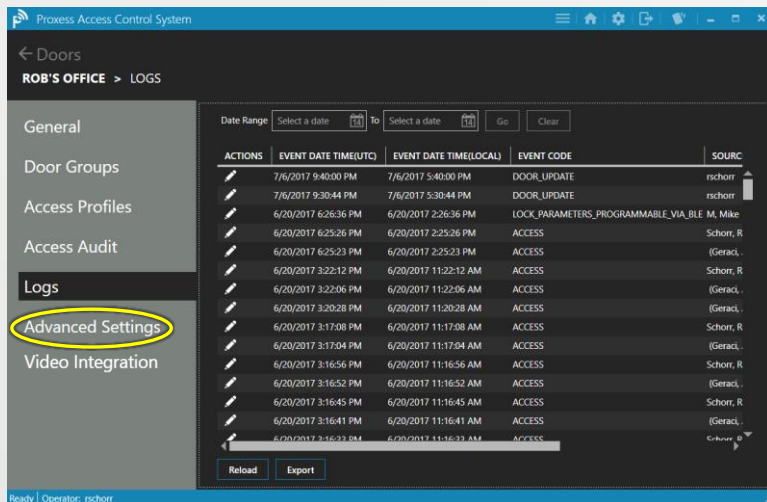
This Access Audit view shows the relationship between the cardholder and their credentials and the door's record that we are in.

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

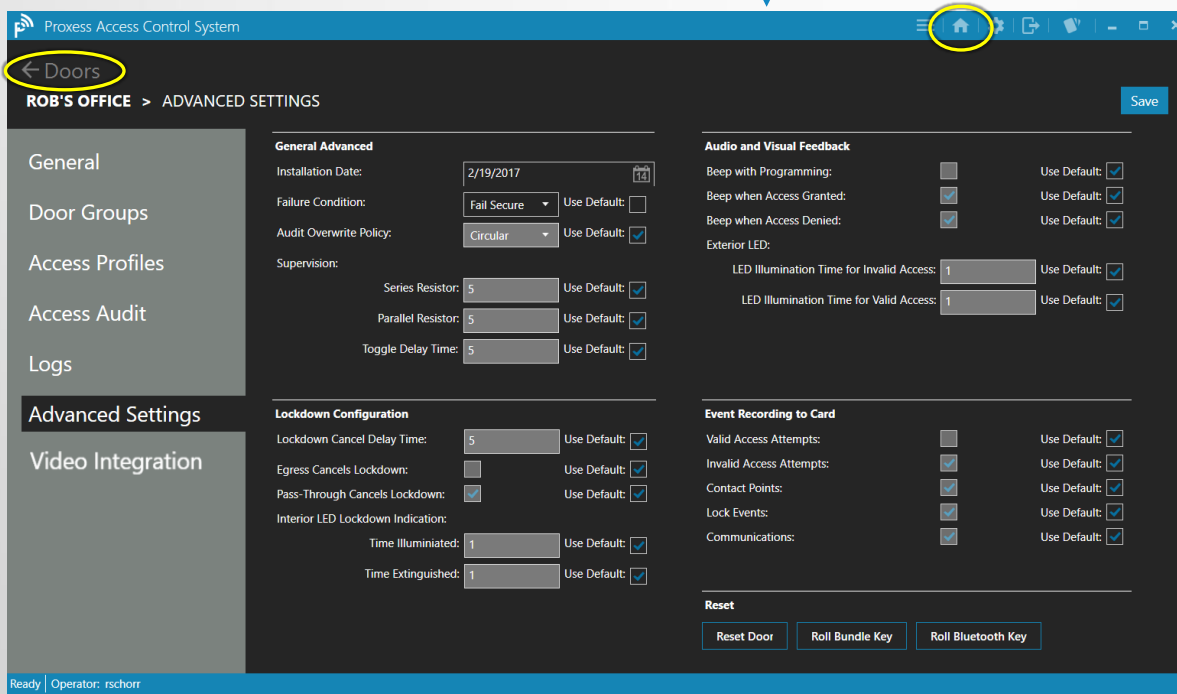
Click "X" in the top right to close this view and return to the list of doors.



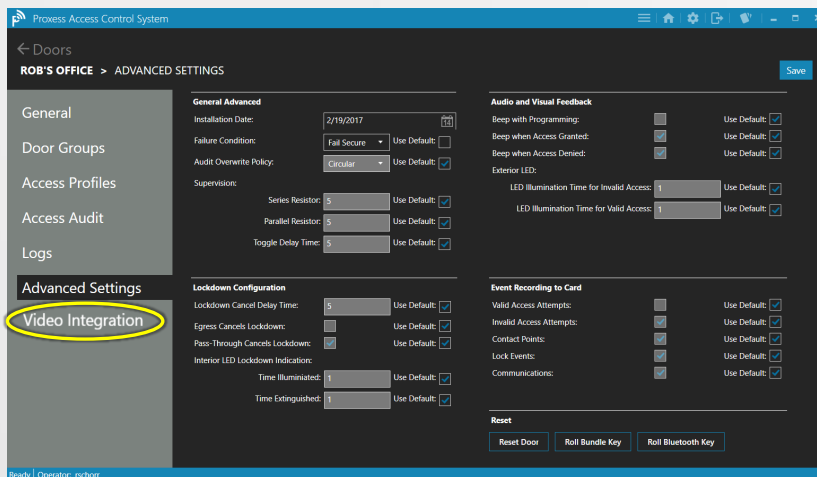
Though you may scroll through this list, you may instead select a starting and ending date and time range for the events to be displayed making the resulting list more pertinent.



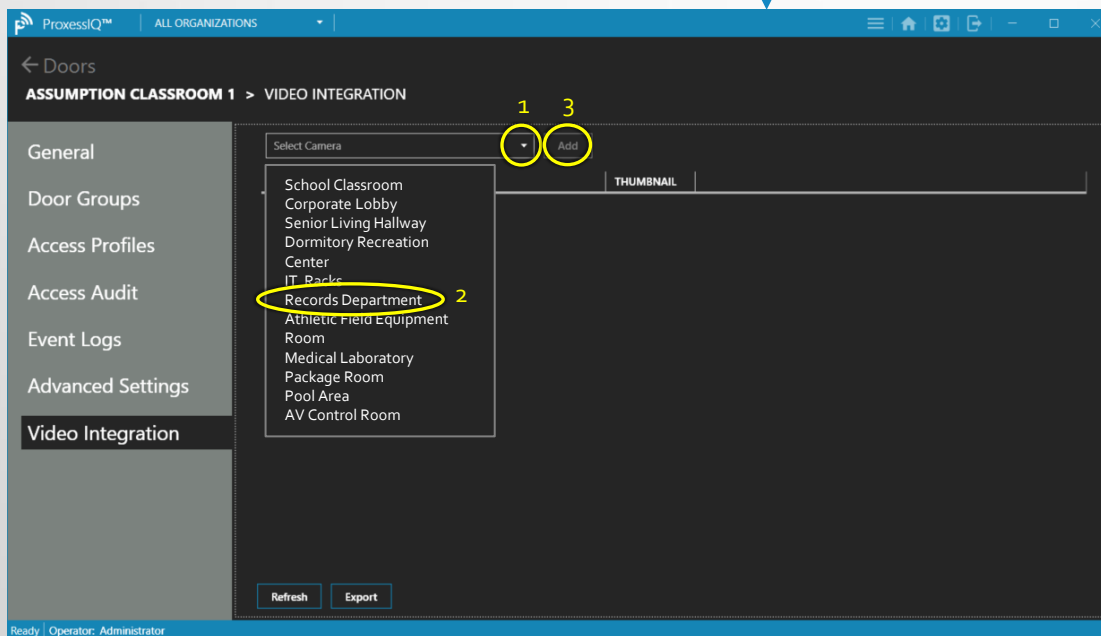
Click on the "Advanced Settings" tab.



Everything in the "Advanced Settings" tab is initialized in a default mode with all the "Defaults" being edited in the "Settings" module. To change any setting, first un-check its "Use Default" box. A lockset is able to be set to Fail in a Secure, Unsecure(Safe or As-is) mode. To return to the Home Screen \ Dashboard, click the "Doors" tab on the top left and then click "Access", or click the Home icon on the top right taskbar.



Click on the "Video Integration" tab.



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

Click on the drop-down arrow (1) and all of the cameras that are connected to the NVR/VMS entered into the config file will automatically appear here. You may select (2) four (4) cameras to be associated with any event from this camera by selecting the first camera and clicking the "Add" button (3) and repeating the process for the cameras you need.



ProxessIQ™ | ALL ORGANIZATIONS

← Doors

**ASSUMPTION CLASSROOM 1 > VIDEO INTEGRATION**

General

Door Groups

Access Profiles

Access Audit

Event Logs

Advanced Settings

**Video Integration**

Select Camera

ACTIONS	NAME	THUMBNAIL
	School Classroom	
	Corporate Lobby	
	Senior Living Hallway	

Ready | Operator: Administrator

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

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





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### Reporting

#### AUDITS/EVENTS

Filter by

Saved Searches

Adhoc →

General →

Daily Use →

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

Doors with one or more cameras affiliated with its events will display a video camera icon.

Double-click on the camera icon to view the thumbnail images of the cameras, at three (3) seconds before the time of the event occurrence.

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

ProxessIQ™ | ALL ORGANIZATIONS

### Logs

#### LOG DETAILS

##### Log Details

Date: 3/7/2024 8:34 PM

Event Code: ACCESS

Event Code Type: Audit/Valid Access

Source Type: Lock Audit

Source Item Name: Assumption Classroom 1

Advanced Details:

```
{
  "Card EventDetails": "53700",
  "Battery": "100%",
  "EventDetailCode": "0x01"
}
```

Thumbnails

NAME	THUMBNAIL
BUILD_862IP_Webcam	
usb_cam-HP Wide Vision HD	
Removed (id={aef671e-1b47-46fa-156d-eeedcd9683f6})	

Ready | Operator: Administrator



## Configuring Video Integration

Proxess currently integrates with Hanwha Wisenet WAVE 5.0

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

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

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

Change or add the information, precisely, per the below

```
<add key="videointegrationenabled" value="true" />
<add key="videointegrationtype" value="1" />
<add key="videointegrationhost" value="https://localhost:7001" />
<add key="videointegrationforcessltrust" value="true" />
<add key="videointegrationusername" value="admin" />
<add key="videointegrationpassword" value="SuperSecurePassword" />
```

Save that file and you may now close it.

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



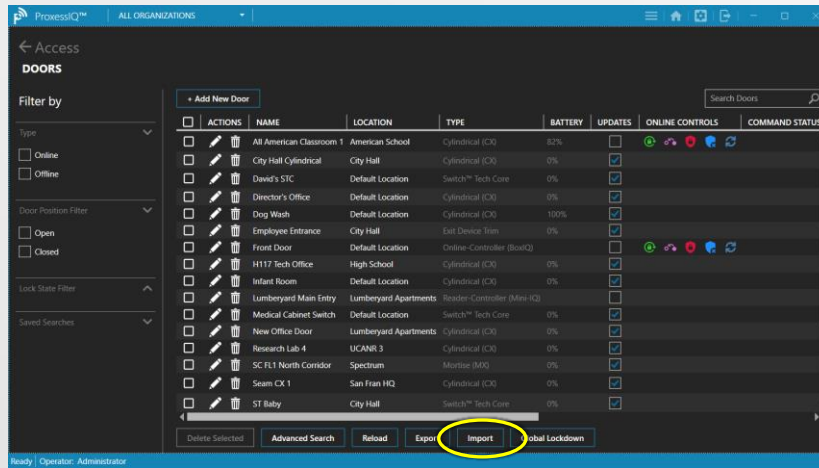
# DOORS & DOOR GROUPS

## Spreadsheet Adding & Editing

How to MASS-Add and edit Doors & Door Groups  
using .csv spreadsheets



# Mass Adding and Editing **Doors**, using a .csv spreadsheet



To make mass Door additions, changes or deletions, no program is simpler or more flexible than Microsoft Excel or Google Sheets.

Proccess can import a .csv formatted file from those programs or Notes, etc., with an unlimited number of Doors entered, for Door, Door Group & Access Profile entry, deletion or changes.

We will now explain the columns of detail that can be added, their format requirements and how to perform the imports and exports.

For reference, these are the overall views of all the fields that can be imported & exported and we will enlarge them and explain each field on the following pages.

Import List snapshot:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	ExternalId	Name	Notes	LockType	Calendar	UnlockTin	EnableBut	EnableBut	Lockdown	EgressCar	Deadbolt	BatteryRef	DoorGrou	AccessPrc	AccessPrc	AssignedC	Organizat	ShareWith	ForceUpdate
2		Suite 1101		Cylindrical		Never	FALSE	FALSE	FALSE	TRUE		#####	Big Dorm						
3		Classroom C217		Mortise		Bell Sched	TRUE	FALSE	FALSE	TRUE		#####	Classrooms	All Doors	Science Building				
4		Main Entry		Online-Controller		Business Hours			FALSE	TRUE		#####	All Doors						
5																			
6																			

Export List snapshot:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Name	Location	Type	Battery	Updates	Online Controls	Command Status	Available	Lock State	Reader Co	Video	Organizat	Last Upda	Created (UTC)
2	All American Classr	American Sci	Cylindrical	82%	FALSE							Global	#####	#####
3	City Hall Cylindrical	City Hall	Cylindrical	0%	TRUE							Global		#####
4	David's STC	Default Locat	SwitchTechC	0%	TRUE							Global		#####
5	Director's Office	Default Locat	Cylindrical	0%	TRUE							Global		#####
6	Dog Wash	Default Locat	Cylindrical	100%	TRUE							Global	#####	#####



# Mass Adding and Editing Doors, using a .csv spreadsheet

Import List snapshot (Page 1 of 2):

Note: The column order may not be altered from the below and the exact headers must appear, as shown.

A	B	C	D	E	F	G	H	I	J	K
ExternalID	Name	Notes	LockType	CalendarName	UnlockTimeScheduleName	EnableButtonToggle	EnableButtonLockdown	LockdownRequiresHandle	EgressCancelsLockdown	DeadboltEnables Lockdown

**ExternalID:** Not required to be entered by the end user. Will otherwise be automatically assigned by the system. This is a unique identifier and may not be changed, or the entry will be treated as a second/additional user entry. The User's existing ExternalID must be included here for subsequent data imports, where you wish to have that record updated.

**Name:** Name of the Door that will be automatically entered into the database. If one is already entered with this name, and no ExternalID is entered into column A, then an additional Door will be added to the system with the attributes in this line. If this spreadsheet is meant to update an existing Door name in the system, then be certain the name is spelled correctly and the ExternalID is included in column A. No minimum or maximum characters

**Notes:** No minimum or maximum characters. May be used as a "custom" field for searching and for mass updates via the import sheet.

**LockType:** Must specifically be listed as either "Cylindrical", "Mortise", "Exit Trim", "Mini-Controller" or "Online-Controller".

**CalendarName:** 24 maximum characters. This is the Calendar and associated Holidays (days on which credentials that do not have the Holiday box checked will not work) the Door will follow.

**UnlockTimeScheduleName:** No minimum or maximum characters. This is the name of the Time Schedule that the Door will follow to go into the Unlocked (no credential required for entry) position. This Time Schedule must already have been manually entered into the system, as it will not be automatically created by this import spreadsheet.

**EnableButtonToggle:** Enter "TRUE" if you will allow the interior trim button to "toggle" the door lock status (change it from locked to unlocked and from unlocked to locked), each time it is quick-pressed/pushed. Enter "FALSE" if you do not want this door's button to perform this operation.

**EnableButtonLockdown:** Enter "TRUE" if will allow the interior trim button to be long-pressed/pushed (for a variable 3-to-6 seconds in the software) and have the lock go into the Lockdown mode. Enter "FALSE" if you do not want this door's button to perform this operation.

**LockdownRequiresHandle:** Enter "TRUE" if, for a Lockdown to be performed on the lock, you wish for both the interior trim button to be pressed/pushed, while simultaneously holding the exit lever down. Enter "FALSE" if you do not.

**EgressCancelsLockdown:** If a door is in Lockdown, by any means, any time the handle is used to exit or open the door, the Lockdown will be cancelled and the lock will return to the state appropriate to the day and time.

**DeadboltEnablesLockdown:** Only for a mortise lock with a deadbolt, enter "TRUE" if you want this lock to go into Lockdown when the deadbolt is thrown from the inside. Enter "FALSE" if the deadbolt will only lock the door.



# Mass Adding and Editing **Doors**, using a .csv spreadsheet

Import List snapshot (**Page 2 of 2**):

Note: The column order may not be altered from the below and the exact headers must appear, as shown.

L	M	N	O	P	Q	R	S
BatteryReplace Date	DoorGroupList	AccessProfileList	AccessProfileTime ScheduleName	AssignedController ExternalID	OrganizationGuid	ShareWithChildren Orgs	ForceUpdate

**BatteryReplaceDate:** Not required to be entered by the end user. An informative entry field for maintenance purposes. If done on a large number of locks at a time, it makes sense to use this spreadsheet to enter the date for all the locks.

**DoorGroupList:** The Door Group(s) that this Door is a part of. If more than one will be listed, they must be separated by a "|", with no additional spaces on either side, or the Door Group will be interpreted as not being spelled correctly and it will not be added. An unlimited number of Door Groups can be entered. No minimum or maximum characters.

**AccessProfileList:** Name of the Access Profile(s), which must first be manually added by the system administrator in the Access Profiles menu. No minimum or maximum characters. Up to 24 APs can be added into this cell (which is the maximum number of Direct Privileges [a combination of Doors & Door Groups] that a single credential may have), separated by a "|". Be careful not to include any extra spaces, or the AP will be interpreted as not being spelled correctly.

**AccessProfileTimeScheduleName:** Enter the exact name of the Time Schedule (which must first be manually entered into the Time Schedules menu) that this aggregation of doors will operate during.

**AssignedControllerExternalID:** Enter the exact External ID of the Controller this Door has been connected via Bluetooth with, in the Offline Doors tab of the Controller. Leave this cell blank if the Door has not been connected with a Controller.

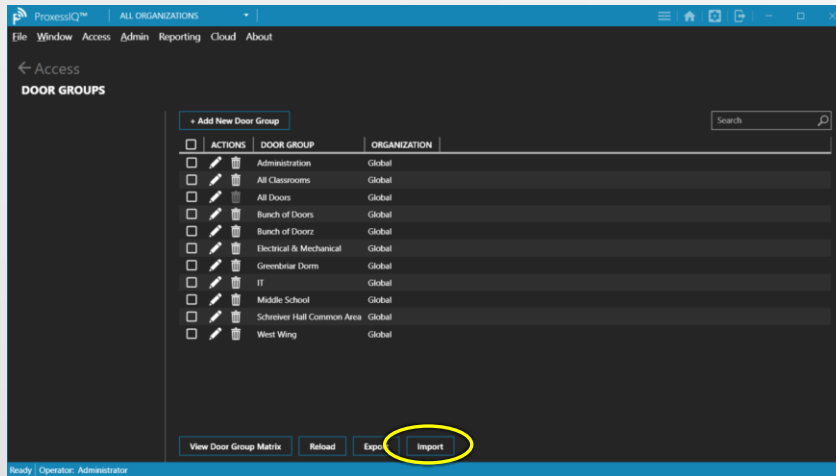
**OrganizationGuid:** If this system has a license for the Partitioned Database / Organizations feature, enter the exact Organization GUID that this Door is apart of.

**ShareWithChildrenOrgs:** If this system has a license for the Partitioned Database / Organizations feature, enter "TRUE" if this Door can be used by / shared with sub-organizations. Otherwise, enter "FALSE".

**ForcedUpdate:** Enter "TRUE" if this Door already exists and the information in this row should be used to update the existing record in the software with this import. Otherwise, enter "FALSE".



# Mass Adding and Editing Door Groups, using a .csv spreadsheet



To make mass Door Group additions, changes or deletions, no program is simpler or more flexible than Microsoft Excel or Google Sheets.

Proccess can import a .csv formatted file from those programs or Notes, etc., with an unlimited number of Door Groups entered, for Door, Door Group & Access Profile entry, deletion or changes.

We will now explain the columns of detail that can be added, their format requirements and how to perform the imports and exports.

For reference, these are the overall views of all the fields that can be imported & exported and we will enlarge them and explain each field on the following pages.

Import List snapshot:

	A	B	C	D	E	F	G	H	I	J	K
1	ExternalId	DoorGroupName	Notes	DoorList	AccessProfileList	AccessProfileTimeScheduleName	AssignedC	EnableAutoEnroll	OrganizationGuid	ShareWithChildrenOrgs	ForceUpdate
2		Bunch of Doorz		Classroom 110   Office 25   Package Room	Teachers	School Day		FALSE	00000000-0000-0000-0000-00000000	FALSE	TRUE
3		Freshman Dorm		Fresh Perim N   FPS   Laundry   Bike Room	Freshers	24/7		TRUE	00000000-0000-0000-0000-00000000	FALSE	TRUE
4											

Door Groups csv Import 08-14-24

Export List snapshot:

	A	B	C
1	Door Group	Organization	
2	Administration	Global	
3	All Classrooms	Global	
4	All Doors	Global	
5	Bunch of Doors	Global	
6	Bunch of Doorz	Global	
7	Electrical & Mechanical	Global	
8	Greenbriar Dorm	Global	

Export of DoorGroups\_2





# Mass Adding and Editing **Door Groups**, using a .csv spreadsheet

Import List snapshot (**Page 1 of 1**):

Note: The column order may not be altered from the below and the exact headers must appear, as shown.

A	B	C	D	E	F	G	H	I	J	K
ExternalID	DoorGroupName	Notes	DoorList	AccessProfileList	AccessProfileTimeScheduleName	AssignedControllerExternalID	EnableAutoEnroll	OrganizationGuid	ShareWithChildrenOrgs	ForceUpdate

**ExternalID:** Not required to be entered by the end user. Will otherwise be automatically assigned by the system. This is a unique identifier and may not be changed, or the entry will be treated as a second/additional user entry. The User's existing ExternalID must be included here for subsequent data imports.

**DoorGroupName:** Name of the Door Group that will be automatically entered into the database. If one is already entered with this name, and no ExternalID is entered into column A, then an additional Door Group will be added to the system with the attributes in this line. If this spreadsheet is meant to update an existing Door name in the system, then be certain the name is spelled correctly and the ExternalID is included in column A. No minimum or maximum characters

**Notes:** No minimum or maximum characters. May be used as a "custom", sortable data (Staff, Student, Administrator, Leadership, Building, Department, etc.) field and for mass updates via the import spreadsheet.

**DoorList:** The Door(s) that are included within this Door Group is a part of. If more than one will be listed, they must be separated by a "|", with no additional spaces on either side, or the Door Group will be interpreted as not being spelled correctly and it will not be added. An unlimited number of Doors can be entered. No minimum or maximum characters.

**AccessProfileList:** Name of the Access Profile(s), which must first be manually added by the system administrator in the Access Profiles menu. No minimum or maximum characters. Up to 24 APs can be added into this cell (which is the maximum number of Direct Privileges [a combination of Doors & Door Groups] that a single credential may have), separated by a "|". Be careful not to include any extra spaces, or the AP will be interpreted as not being spelled correctly.

**AccessProfileTimeScheduleName:** Enter the exact name of the Time Schedule (which must first be manually entered into the Time Schedules menu) that this aggregation of doors will operate during.

**AssignedControllerExternalID:** Not currently used

**EnableAutoEnroll:** Enter "TRUE" if this Door Group will be automatically added to every new User. Enter "FALSE" if it won't.

**OrganizationGuid:** If this system has a license for the Partitioned Database / Organizations feature, enter the exact Organization GUID that this Door is apart of.

**ShareWithChildrenOrgs:** If this system has a license for the Partitioned Database / Organizations feature, enter "TRUE" if this Door can be used by / shared with sub-organizations. Otherwise, enter "FALSE".

**ForcedUpdate:** Enter "TRUE" if this Door already exists and the information in this row should be used to update the existing record in the software with this import. Otherwise, enter "FALSE".



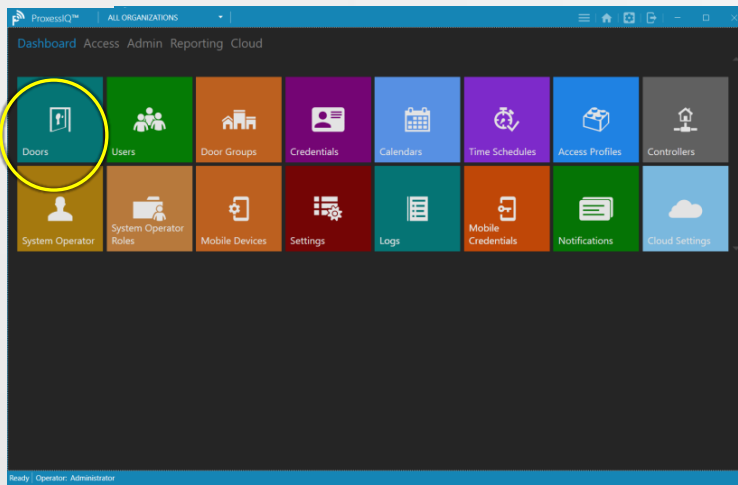


# DOORS

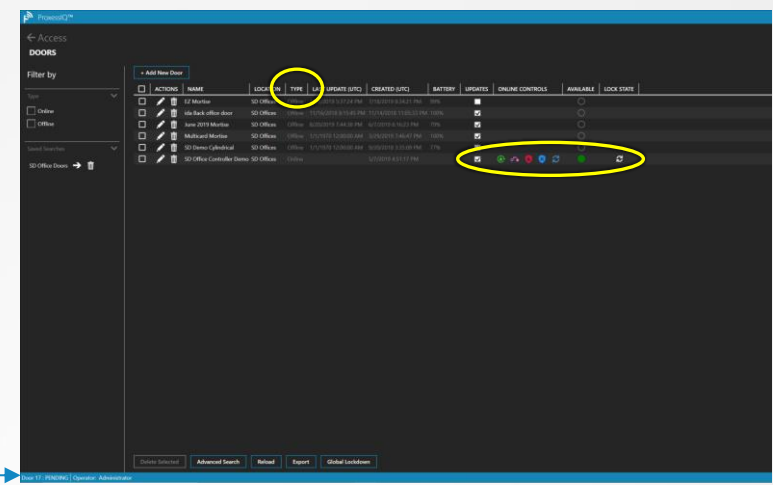
**Controlling Online & Bridged Doors**



# Controlling Online & Bridges Doors - 1



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



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

ATED (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

ATED (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.

ATED (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.



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

Refresh State

Click this icon to Refresh the state of the lock.

CREATED (UTC)	BATTERY	UPDATES	ONLINE CONTROLS	AVAILABLE	LOCK STATE
7/18/2019 8:34:21 PM	99%	<input type="checkbox"/>		<input type="radio"/>	
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.

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

Quick Unlock

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

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

Momentary Unlock

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

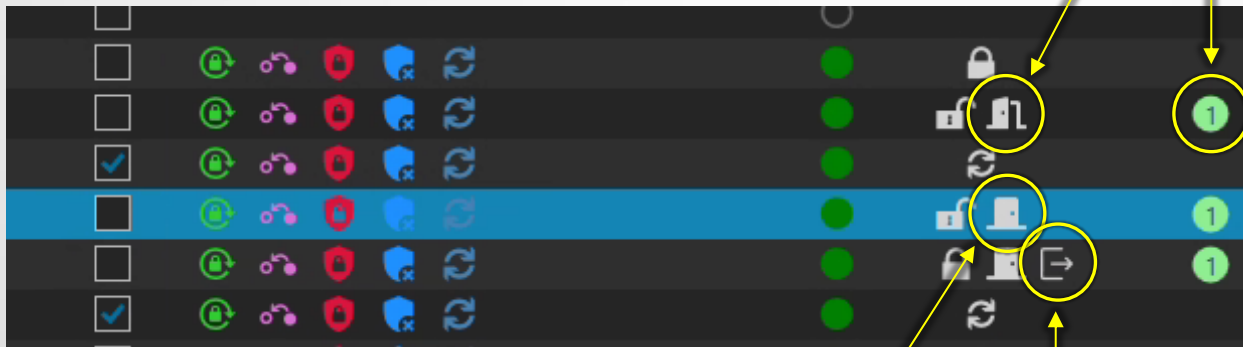
This icon shows that the lock has been and is now locked.



## More Status Icons

This icon shows that Reader #1 is Connected.

This icon shows that the Door is Open.



This icon shows that the Door is Closed.

This icon shows that the Request-to-Exit input has been activated.



# Global and Grouped Lockdowns

ProxessIQ™ | ALL ORGANIZATIONS

File Window Access Admin Reporting Cloud About

← Access

**DOORS**

Filter by

Type

☐ Online

☐ Offline

Door Position Filter

☐ Open

☐ Closed

Lock State Filter

Saved Searches

+ Add New Door

Search Doors

<input type="checkbox"/>	ACTIONS	NAME	LOCATION	TYPE	BATTERY	UPDATES	ONLINE CONTROLS	COMMAND STATUS
<input type="checkbox"/>		All American Classroom 1	American School	Cylindrical (CX)	93%	<input type="checkbox"/>		
<input type="checkbox"/>		City Hall Cylindrical	City Hall	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>		
<input type="checkbox"/>		David's STC	Default Location	Switch™ Tech Core	0%	<input checked="" type="checkbox"/>		
<input type="checkbox"/>		Director's Office	Default Location	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>		
<input type="checkbox"/>		Dog Wash	Default Location	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>		
<input type="checkbox"/>		Front Door	Default Location	Online-Controller (BoxIQ)		<input type="checkbox"/>		
<input type="checkbox"/>		H117 Tech Office	High School	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>		
<input type="checkbox"/>		Infant Room	Default Location	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>		
<input type="checkbox"/>		KB VT	Default Location	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>		
<input type="checkbox"/>		Laurens Remote Building	Default Location	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>		
<input type="checkbox"/>		Lumberyard Main Entry	Lumberyard Apartments	Reader-Controller (Mini-IQ)		<input type="checkbox"/>		
<input type="checkbox"/>		Medical Cabinet Switch	Default Location	Switch™ Tech Core	0%	<input checked="" type="checkbox"/>		
<input type="checkbox"/>		Mr. F's Door	Lumberyard Apartments	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>		
<input type="checkbox"/>		New Office Door	Lumberyard Apartments	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>		
<input type="checkbox"/>		Research Lab 4	UCANR 3	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>		
<input type="checkbox"/>		SC FL1 North Corridor	Spectrum	Mortise (MX)	0%	<input checked="" type="checkbox"/>		
<input type="checkbox"/>		Schreiber 124	Default Location	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>		
<input type="checkbox"/>		Scam CV 1	San Fran HQ	Cylindrical (CX)	0%	<input checked="" type="checkbox"/>		

Delete Selected Advanced Search Reload Export **Global Lockdown**

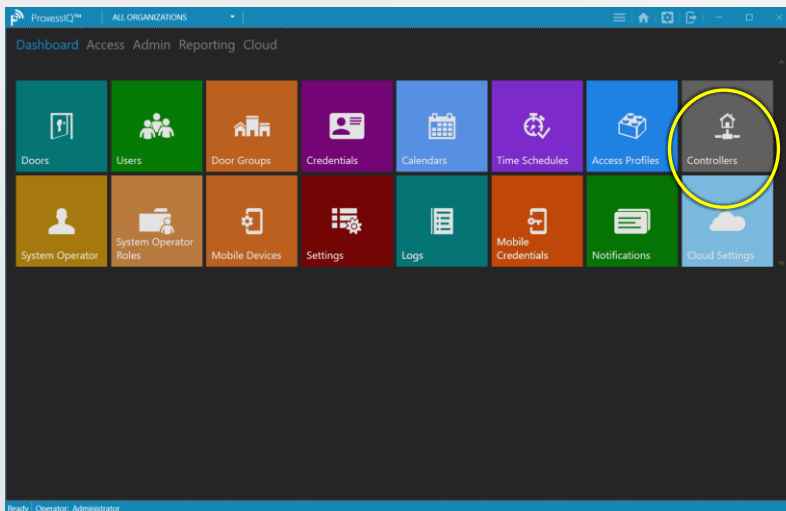
Ready | Operator: Administrator



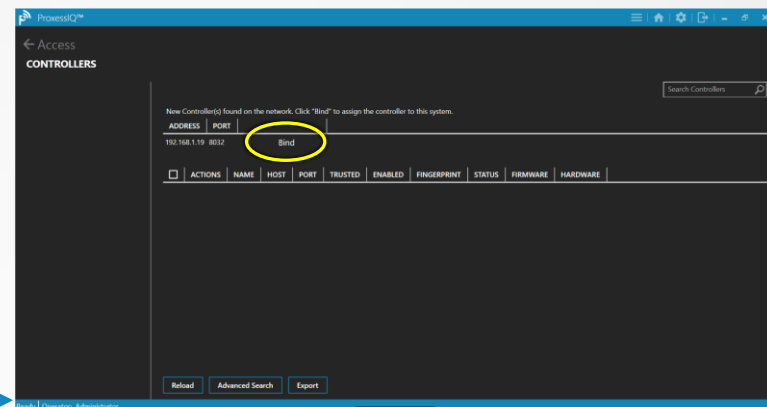
# CONTROLLERS



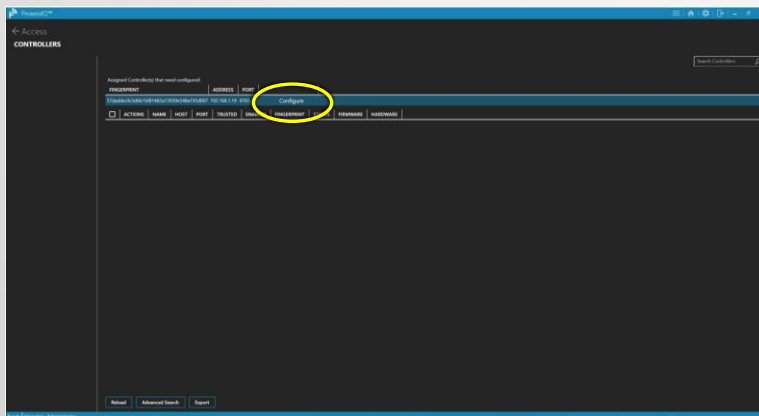
# Adding & Editing Controllers - 1



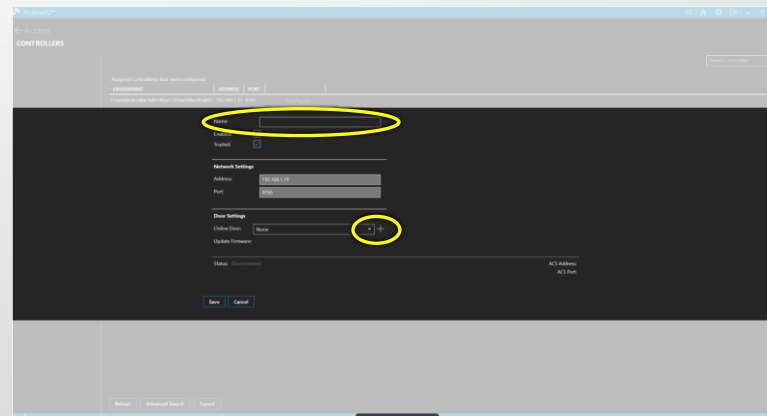
To add a controller to the system, click on the "Controller" module icon. After adding a Controller, you will then be able to select entry & exit readers that you have added into the "Doors" module to connect.



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



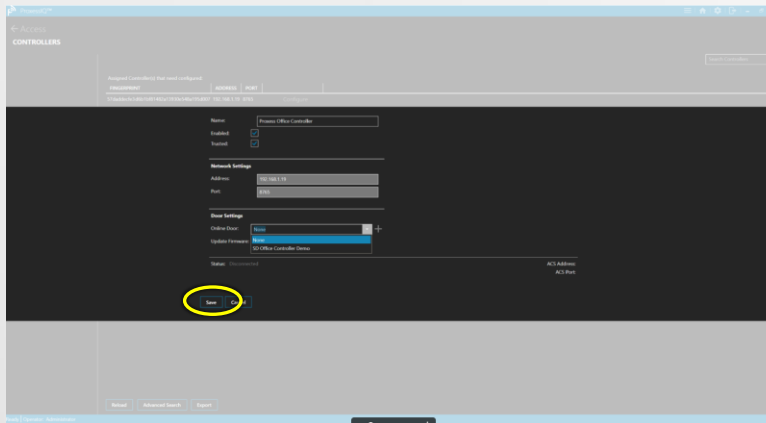
Now click "Configure" to have the software configure this controller for its proper function within this software instance.



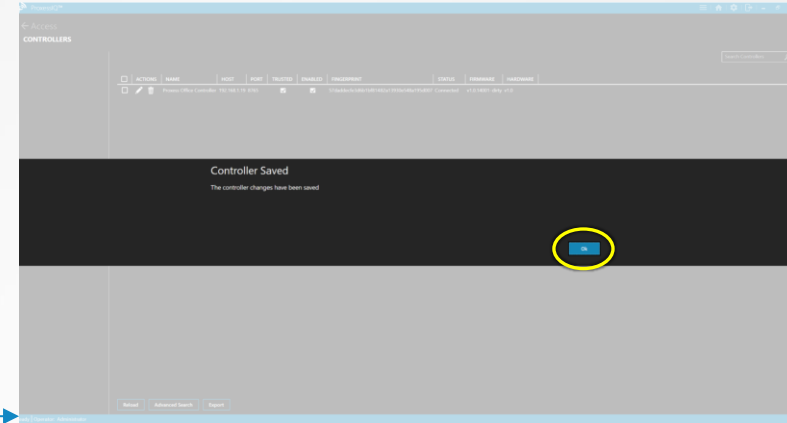
Type a name for this controller. Next, click on the drop-down arrow above.



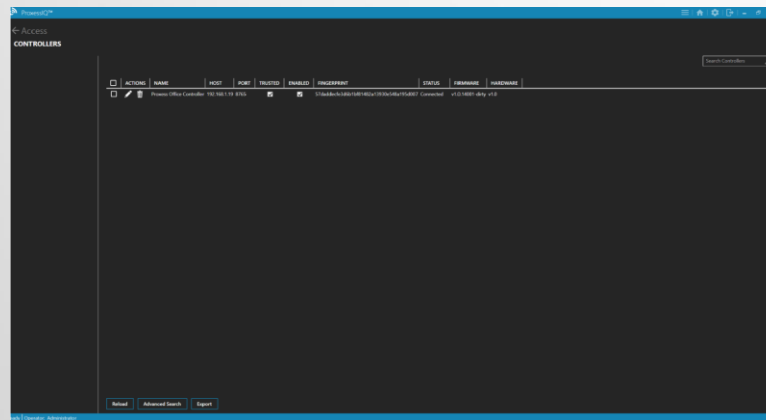
## Adding & Editing Controllers - 2



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



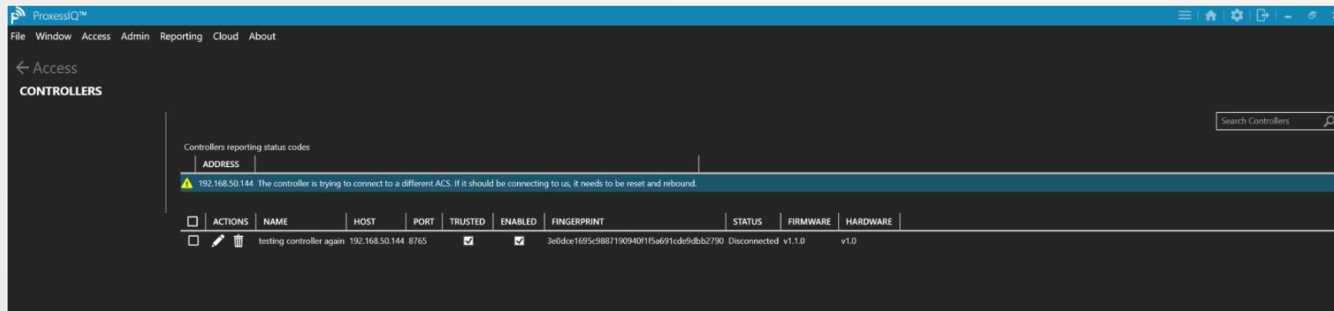
Click "OK" on the verification screen.



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

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





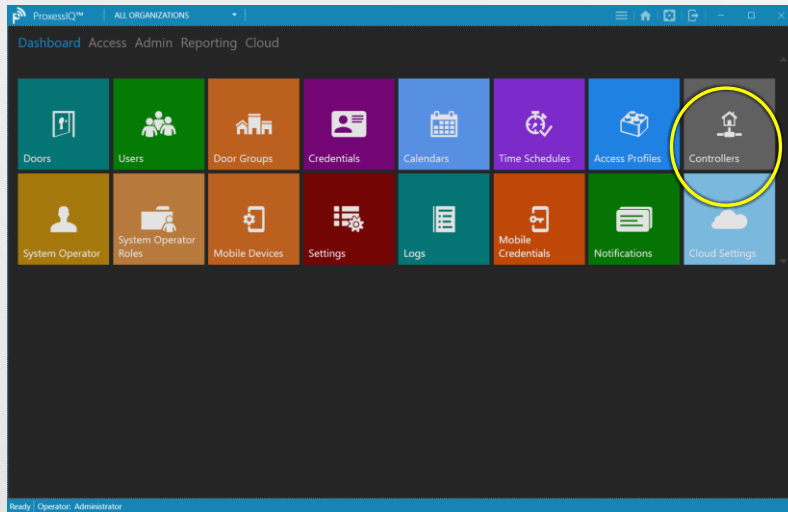
Note: It is unlikely, but possible to receive this Controller screen error message. For instance, if a controller from another system is placed on the network for your system (in a dealer's lab, for instance), your software will note the above, prompting your investigation and possible resetting of that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

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

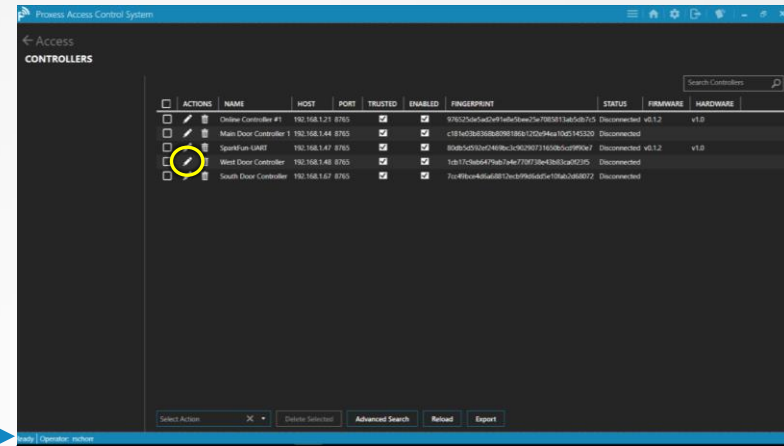
- Controllers reporting status codes
- New Controller(s) found on the network. Click "Bind" to assign the controller to this system.
- The Controller is unable to reach the Proxess service. Check inbound TCP firewall rules.
- The Controller is timing out during key exchange. This is likely caused by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



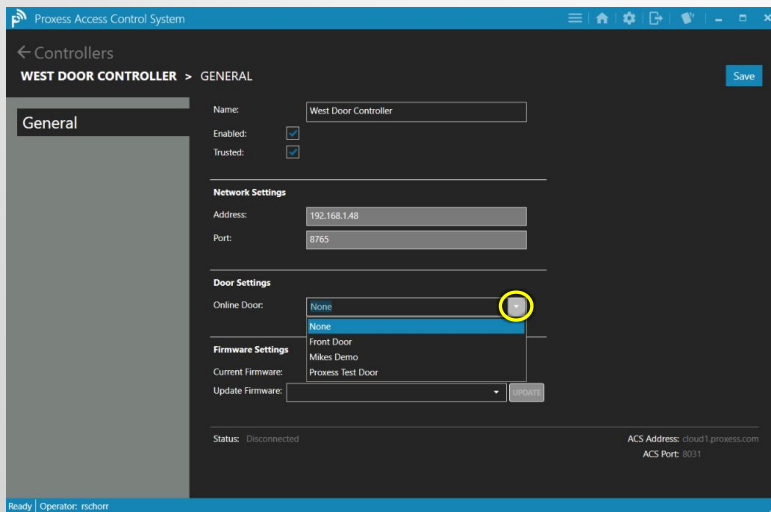
## Adding & Editing Controllers - 4



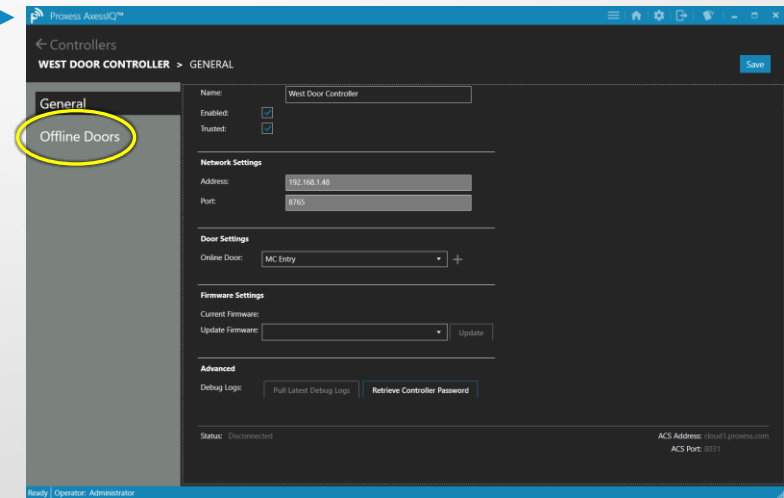
To add a door controller to the system, click on the "Controller" module icon. After adding a Controller, you will then be able to select entry & exit readers that you have added into the "Doors" module to connect.



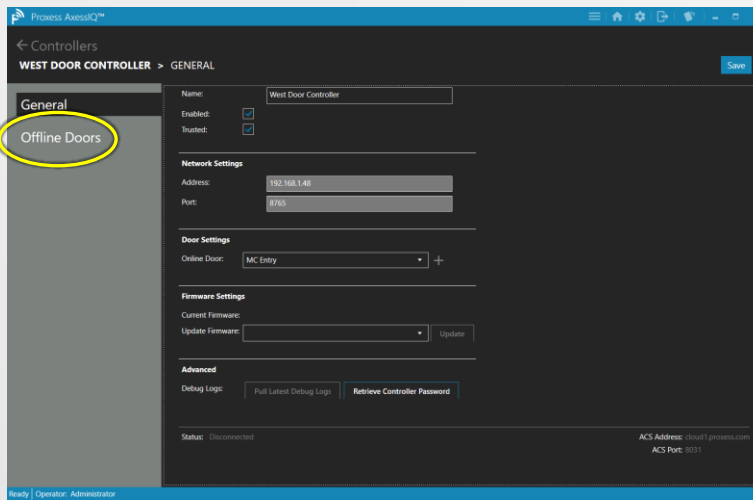
Now we will show how to add readers to a controller that is already in the system, click its *Edit* icon shown above.



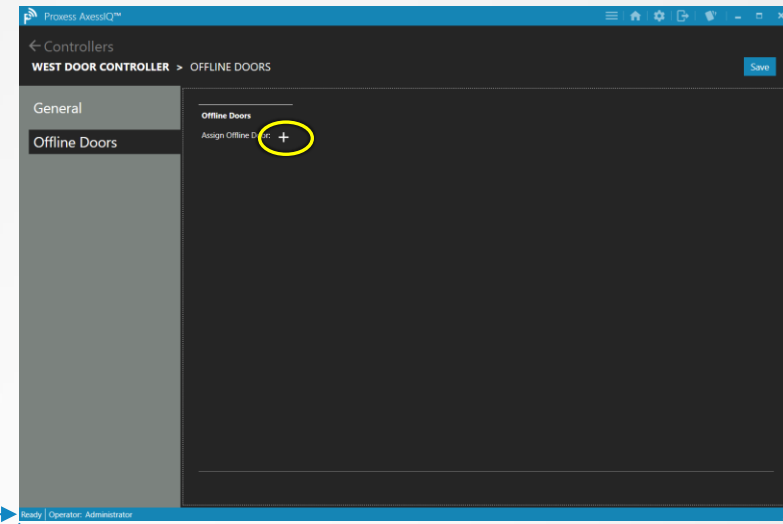
Add any door that has been defined as "Online" in the "Door Type" field of the *Doors* module may be connected to this controller by clicking this arrow and selecting it from the drop-down list.



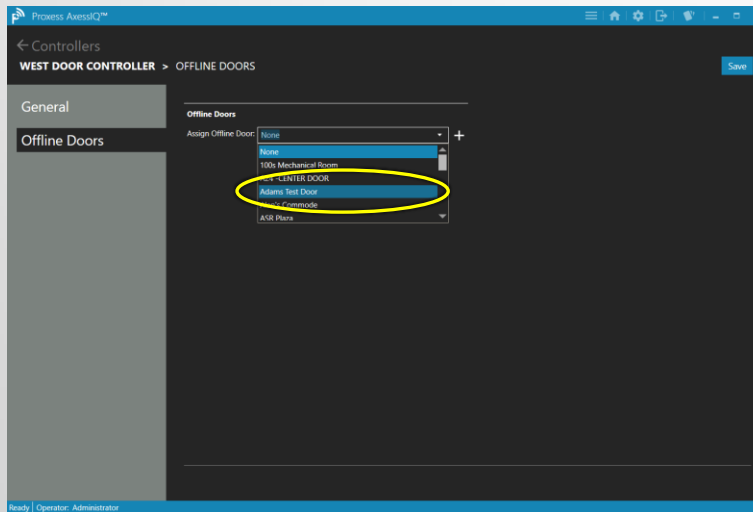
The Controller screen now shows the reader that has been attached to that Controller.



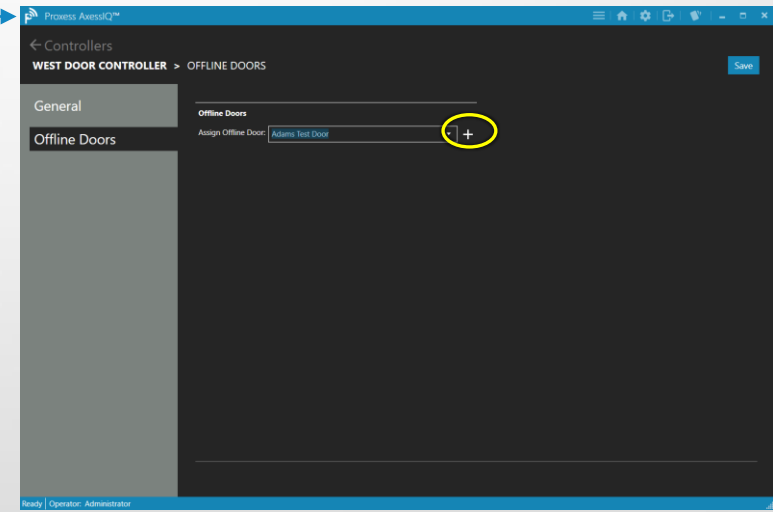
Now click on "Offline Doors" to bind cylindrical locksets, mortise locksets and Mini-Controllers to the Controller.



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.

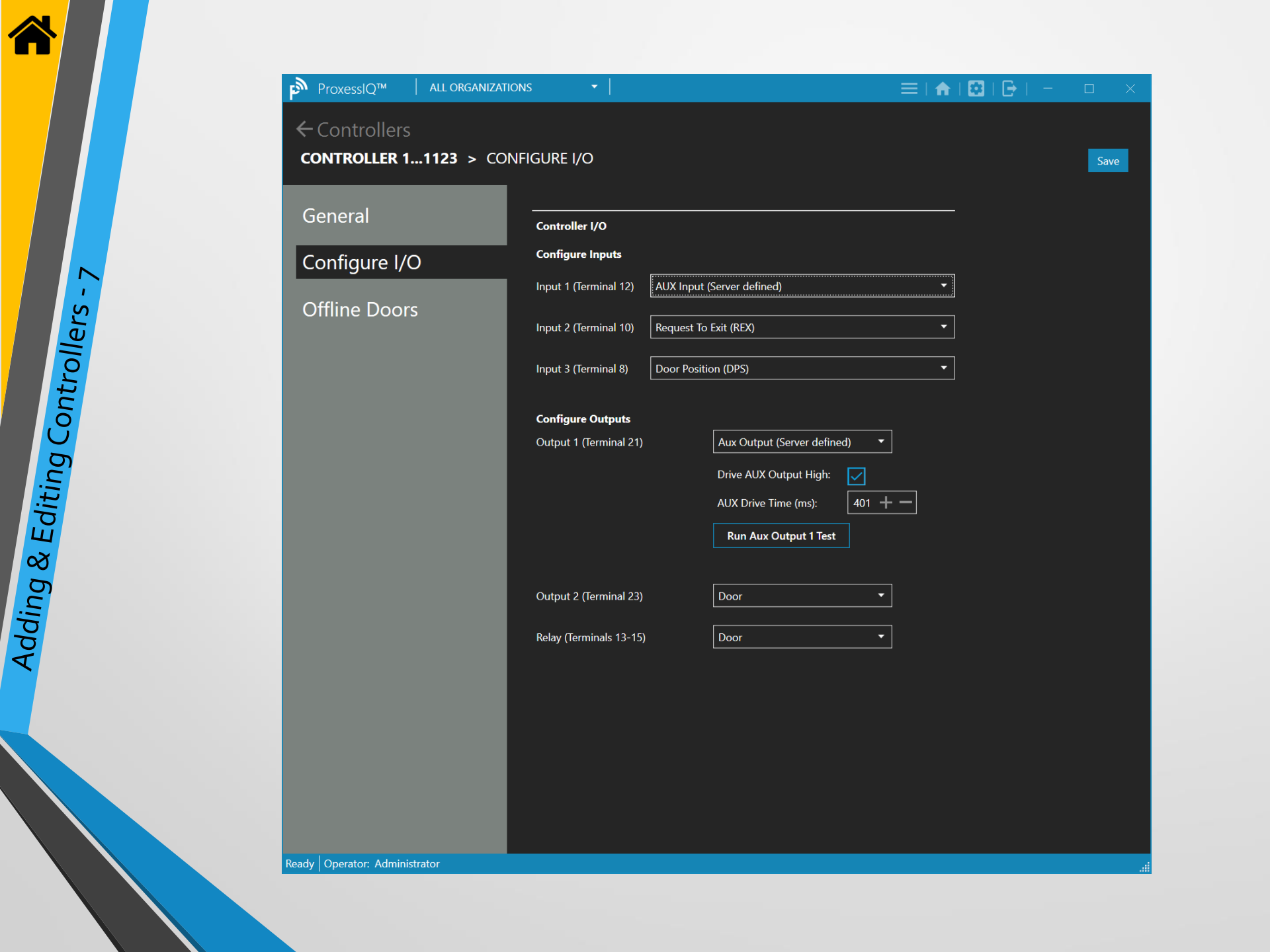


## Find the MAC Address of a Controller with Putty

Within Putty, while connected to the serial connector of a controller from a laptop;

- Go to the command prompt and modify the command line to the below:
- "root@varsomam33:/usr/bin# ifconfig"
- Press Enter and its MAC/Hardware address will appear, as in the underlined

```
root@varsomam33:/usr/bin# ifconfig
eth0      Link encap:Ethernet  HWaddr 38:D2:69:A1:6B:26
          inet addr:192.168.50.79  Bcast:192.168.50.255  Mask:255.255.255.0
          UP BROADCAST RUNNING MULTICAST  MTU:1500  Metric:1
          RX packets:2386791 errors:0 dropped:676 overruns:0 frame:0
          TX packets:1788712 errors:0 dropped:0 overruns:0 carrier:0
          collisions:0 txqueuelen:1000
          RX bytes:258854126 (246.8 MiB)  TX bytes:156454190 (149.2 MiB)
          Interrupt:177
```



ProcessIQ™

ALL ORGANIZATIONS

← Controllers

CONTROLLER 1...1123 > CONFIGURE I/O

Save

General

Configure I/O

Offline Doors

Controller I/O

Configure Inputs

Input 1 (Terminal 12)AUX Input (Server defined)

Input 2 (Terminal 10)Request To Exit (REX)

Input 3 (Terminal 8)Door Position (DPS)

Configure Outputs

Output 1 (Terminal 21)Aux Output (Server defined)

Drive AUX Output High:☒

AUX Drive Time (ms):401 + -

Run Aux Output 1 Test

Output 2 (Terminal 23)Door

Relay (Terminals 13-15)Door

Ready | Operator: Administrator



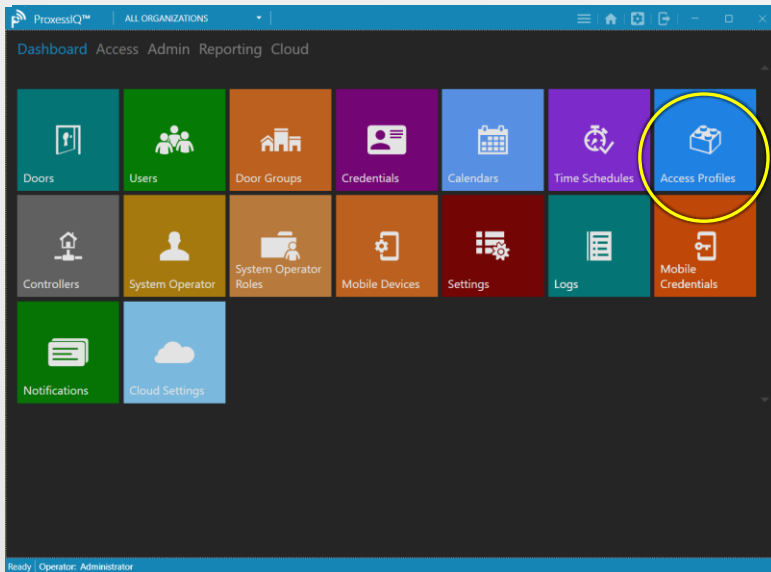
# ACCESS PROFILES

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

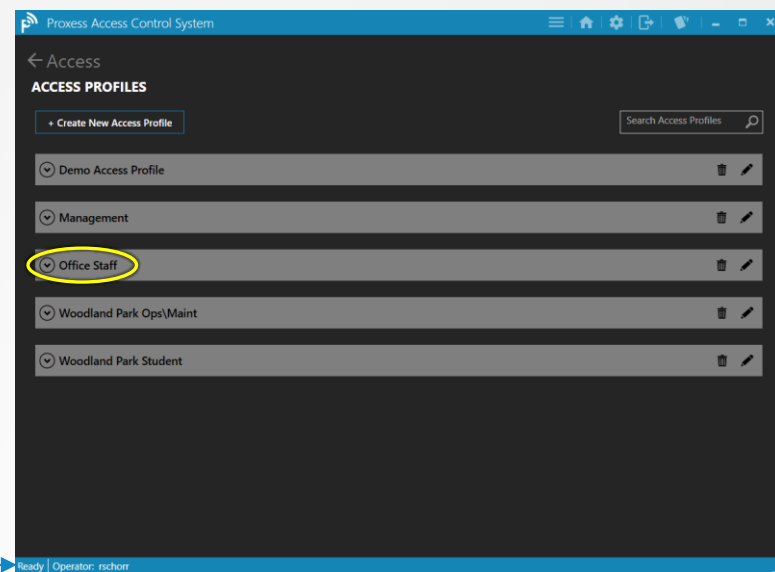
The **benefit** to the operator is to minimize keystrokes when assigning rights to each card. Ideally, spending time up front to create thoughtful Access Profiles could result in just a single right being assigned to each credential, as opposed to numerous Door Groups and Doors needing to be added to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



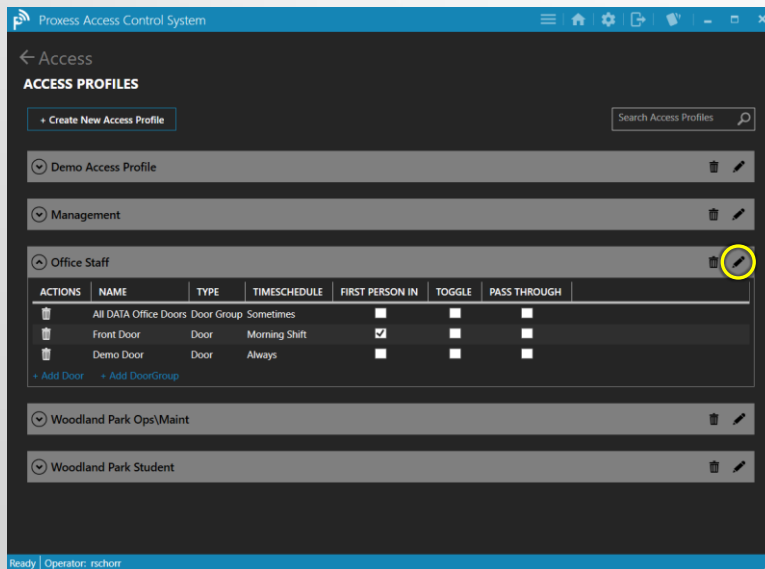
## Access Profiles - 1



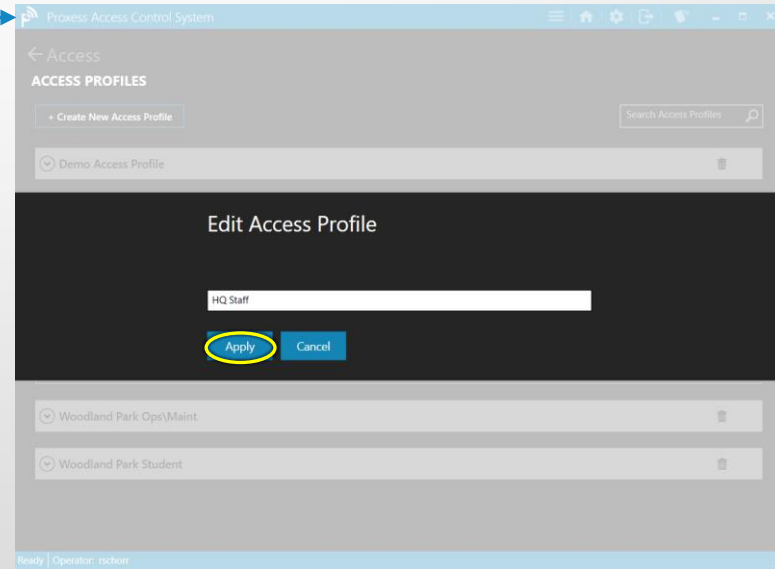
Access Profiles combine Time Schedules and Doors (and Door Groups) together and can then be assigned to Users. To create or edit them, click the "Access Profiles" icon.



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



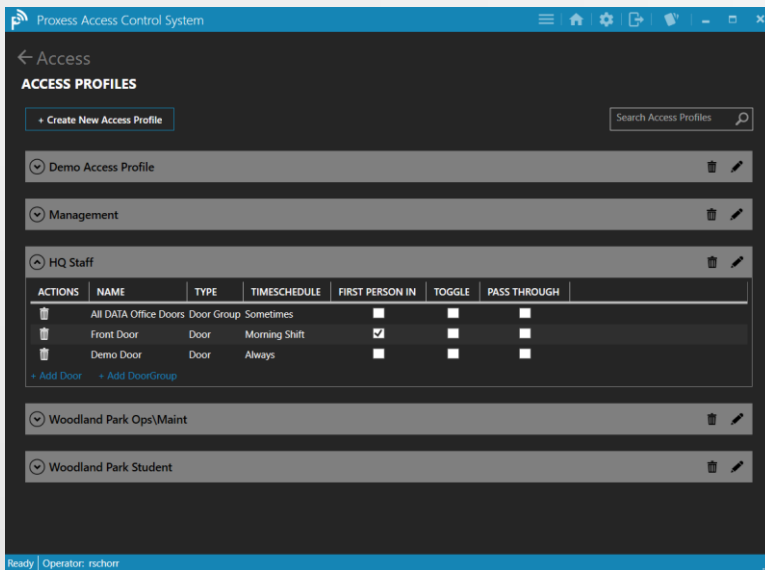
Click the Edit icon.



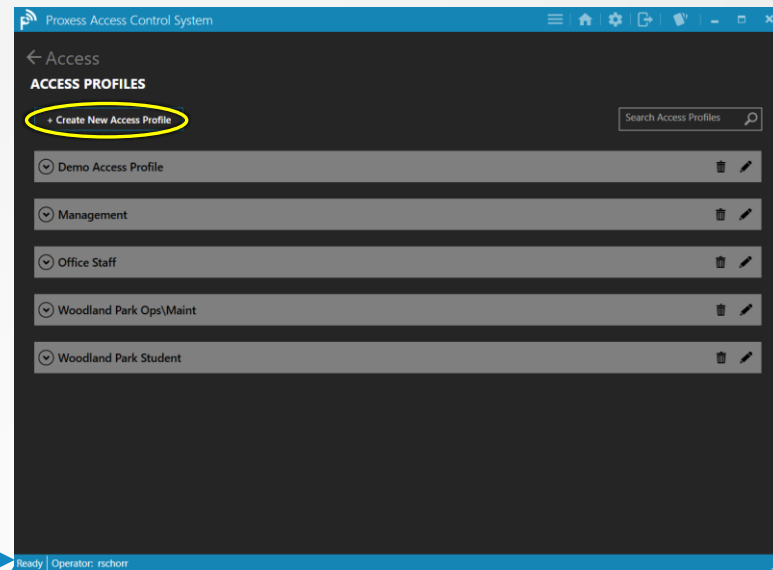
Change the name and click "Apply".



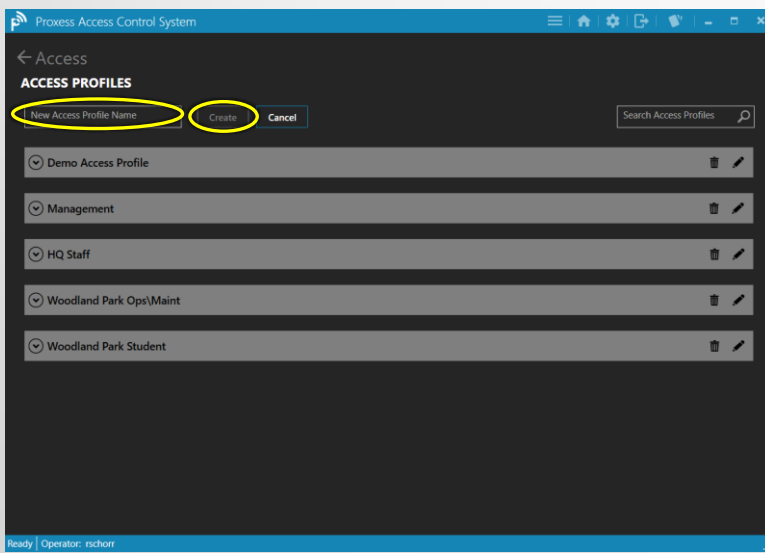
## Access Profiles - 2



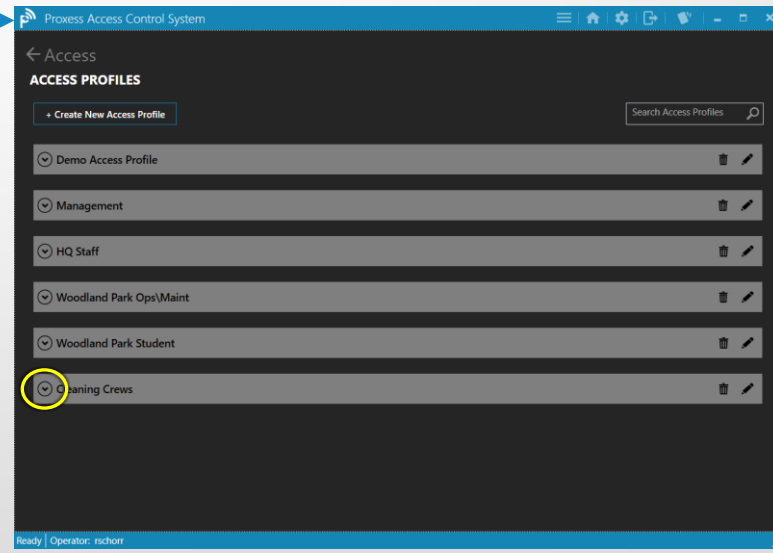
The new Access Profile name appears.



Click "Create New Access Profile".

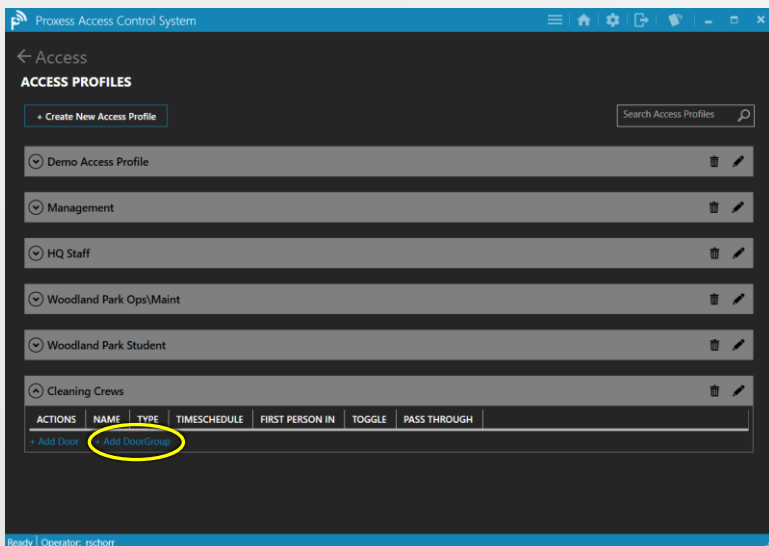


Enter a name for the new Access Profile and then click "Create".

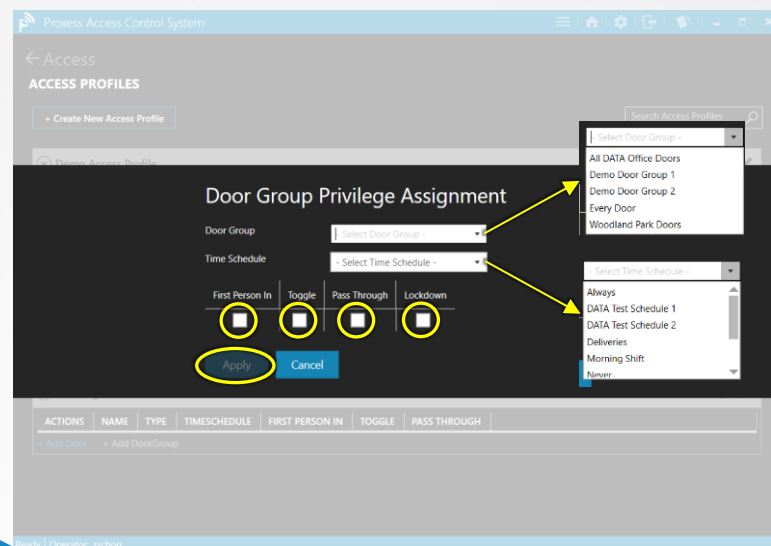


The new Access Profile appears. Click the dropdown arrow to view and edit the details.

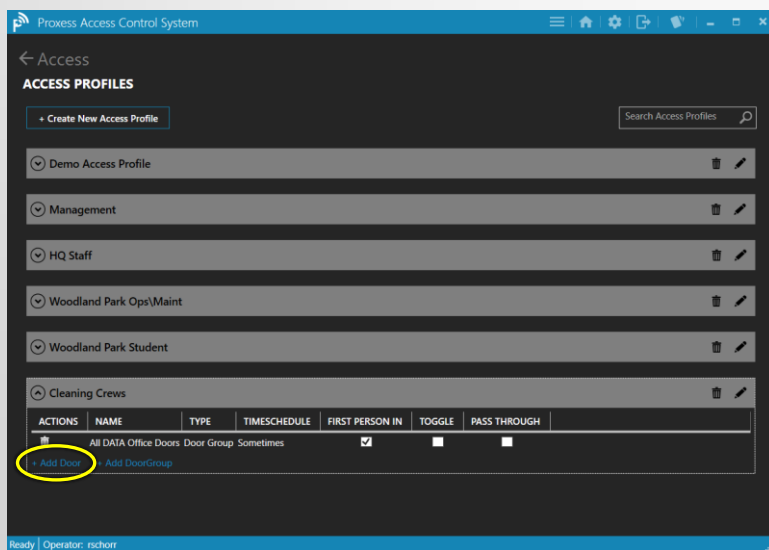




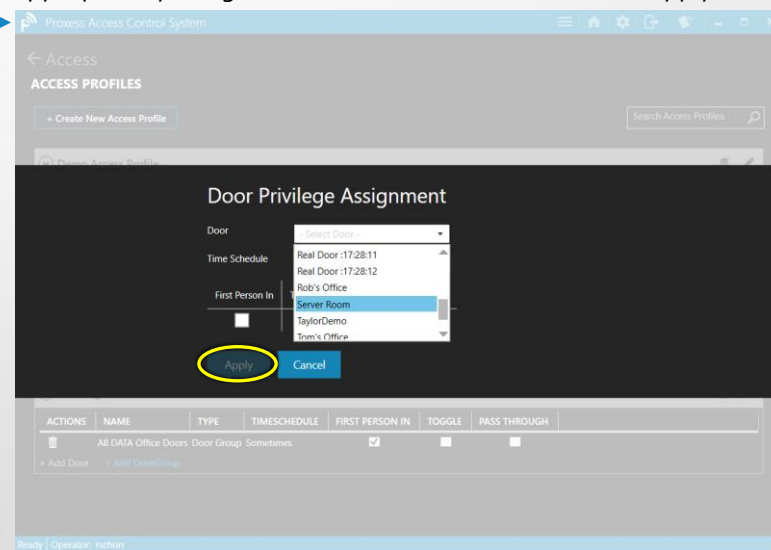
To add a Door Group to the new Access Profile, click "Add Door Group".



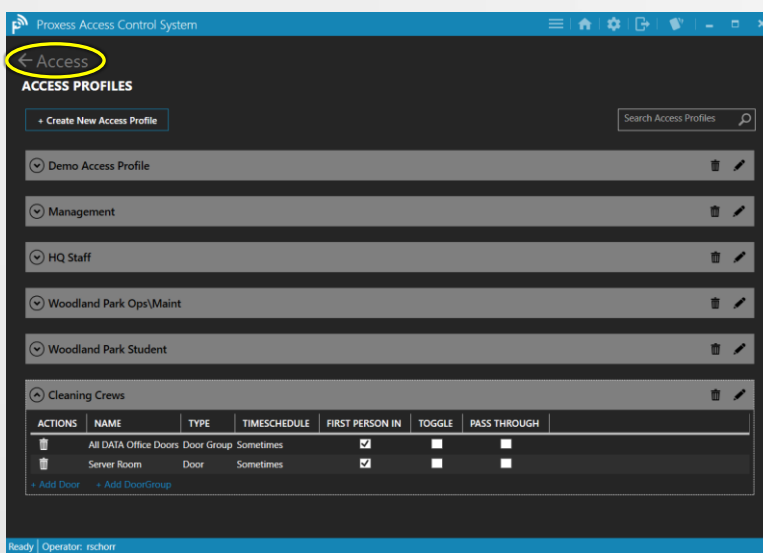
Use the dropdown arrows to select the Door Group to add along with the corresponding Time Schedule that those doors will operate within. Check any of the features that can be used at those doors by appropriately designated cardholders\Users and click "Apply".



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



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



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.



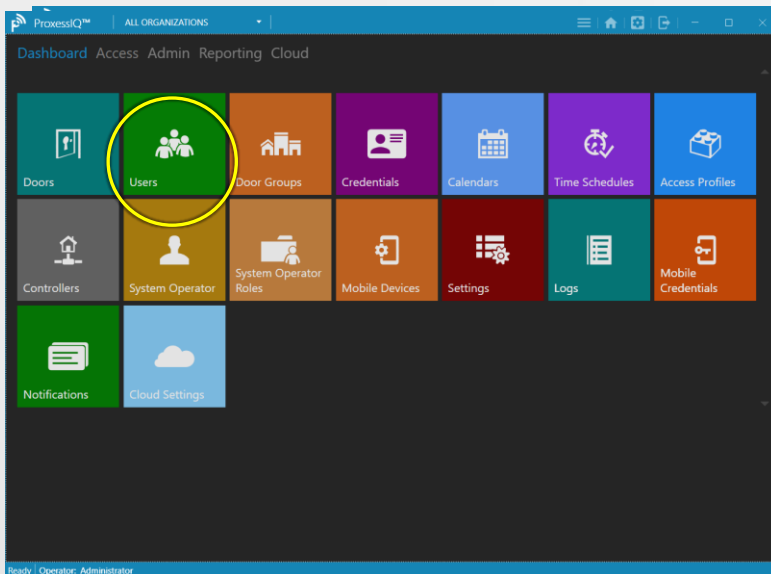
# USERS

## Adding & Editing

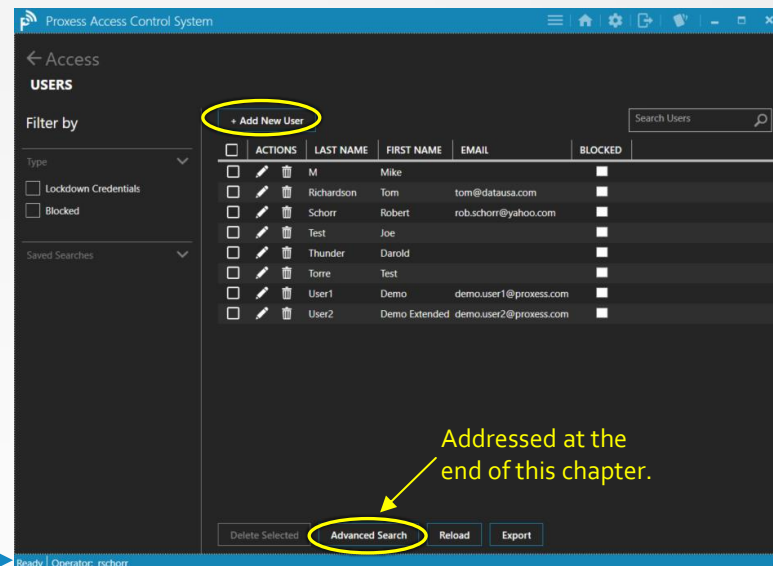
**PHYSICAL Credentials** (including cards, fobs and coin & portrait stickers) are addressed in this section.  
**Mobile Credentials** are addressed in the following section.



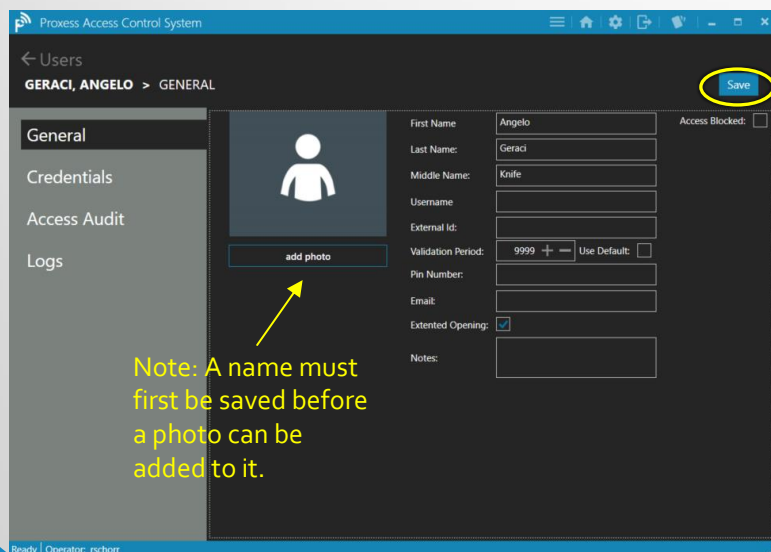
# Adding New Users & Credentials - 1



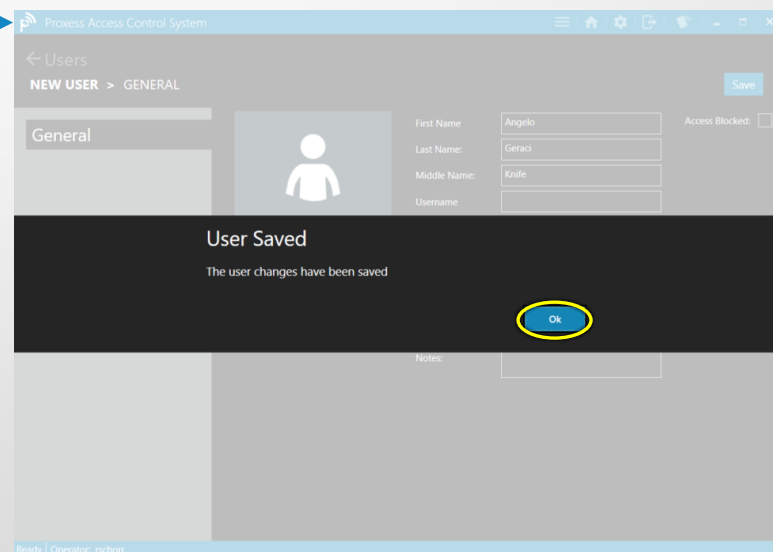
The Users module is where we add and edit new Users\ Cardholders and credentials. Their rights to access doors and door groups are also defined here. Click the "Users" icon.



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 90 days for evaluations of new hires. Select the Status of this credential and check the box if it is to be Blacklisted (disallowing access with the *credential*, as opposed to disallowing access of the *user*). You may give a "Name" to this card, such as Vehicle Tag, or Phone Sticker. If you wish to change the "Revalidation Date", return to the "General" tab after saving. Click "Save".



# Adding New Users & Credentials - 3

Proxess Access Control System

← Users  
GERACI, ANGELO > CREDENTIALS > (CREDENTIAL)

Write to Card Save

General

Credentials

Access Audit

Logs

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

Activation Date: 5/12/2017 Expiration Date: 5/12/2018 Credential Status: Active Blacklist

Access Profiles (Inherited Privileges)

ACTIONS NAME

+ Add Access Profile

Direct Privileges

ACTIONS	NAME	TYPE	TIMESCHEDULE	FIRST PERSON IN	TOGGLE	PASS THROUGH	LOCKDOWN
+ Add Door	+ Add DoorGroup						

Ready | Operator: rschon

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.

Proxess Access Control System

← Users  
GERACI, ANGELO > CREDENTIALS > (CREDENTIAL)

Write to Card Save

General

Credentials

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

Activation Date: 5/12/2017 Expiration Date: 5/12/2018 Credential Status: Active Blacklist

Select Access Profile

Office Staff

Apply Cancel

Ready | Operator: rschon

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

Proxess Access Control System

← Users  
GERACI, ANGELO > CREDENTIALS > (CREDENTIAL)

Write to Card Save

General

Credentials

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

Activation Date: 5/12/2017 Expiration Date: 5/12/2018 Credential Status: Active Blacklist

Select Access Profile

Office Staff

Apply Cancel

Front Door Door Always

+ Add Door + Add DoorGroup

Ready | Operator: rschon

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

Proxess Access Control System

← Users  
GERACI, ANGELO > CREDENTIALS > (CREDENTIAL)

Write to Card Save

General

Credentials

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

Activation Date: 5/12/2017 Expiration Date: 5/12/2018 Credential Status: Active Blacklist

Access Profiles (Inherited Privileges)

ACTIONS NAME

Office Staff

+ Add Access Profile

Direct Privileges

ACTIONS	NAME	TYPE	TIMESCHEDULE	FIRST PERSON IN	TOGGLE	PASS THROUGH	LOCKDOWN
+ Add Door	+ Add DoorGroup						

Ready | Operator: rschon

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



# Adding New Users & Credentials - 4

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: 5/12/2018 Credential: Credential

Door Privilege Assignment

Door: -Select Door-

Time Schedule: -Select Time Schedule-

First Person In Toggle Pass Through Lockdown

Apply Cancel

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. (?)

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: 5/12/2018 Credential: Credential

Door Privilege Assignment

Door: Rob's Office

Time Schedule: Deliveries

First Person In Toggle Pass Through Lockdown

Apply Cancel

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

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: 5/12/2018 Credential Status: Active Backlist

Access Profiles (Inherited Privileges)

ACTIONS	NAME
	Office Staff

+ Add Access Profile

Direct Privileges

ACTIONS	NAME	TYPE	TIMESCHEDULE	FIRST PERSON IN	TOGGLE	PASS THROUGH	LOCKDOWN
	Rob's Office	Door	Always	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Every Door	Door Group	Morning Shift	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

+ Add Door + Add DoorGroup

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".

Proxess Access Control System

← Users  
GERACI, ANGELO > CREDENTIALS > (CREDENTIAL)

Write to Card Save

General

Stamped ID: 000000000070262 Name: Credential Revalidation Date: 9/27/2044

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

Access Profiles (Inherited Privileges)

ACTIONS	NAME
	Office Staff

+ Add Access Profile

Direct Privileges

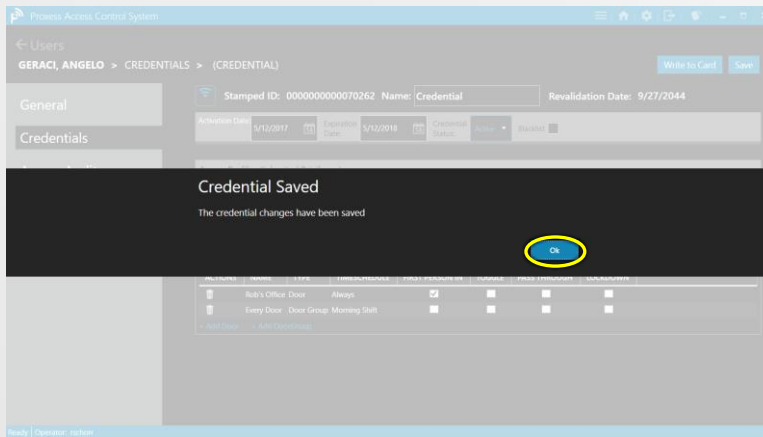
ACTIONS	NAME	TYPE	TIMESCHEDULE	FIRST PERSON IN	TOGGLE	PASS THROUGH	LOCKDOWN
	Rob's Office	Door	Always	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Every Door	Door Group	Morning Shift	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

+ Add Door + Add DoorGroup

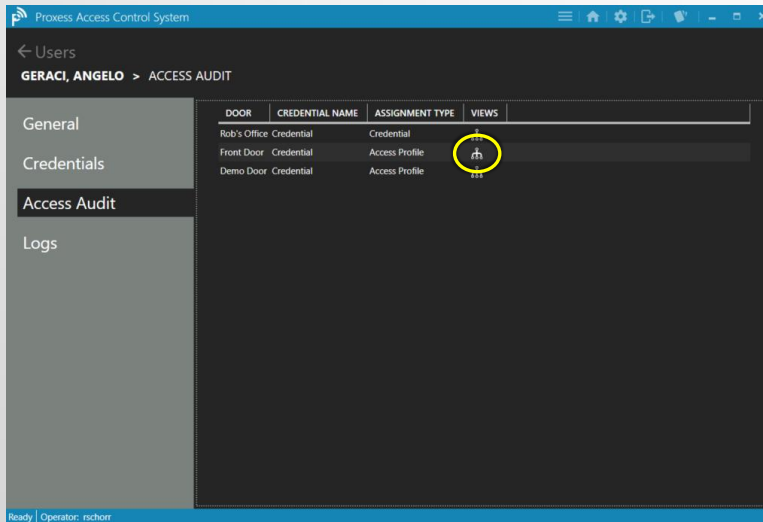
The "Stamped ID" of the card will now be shown towards the top of the screen, along with the selected Revalidation Date. Click "Save" to complete the process. The card programming process is now complete.



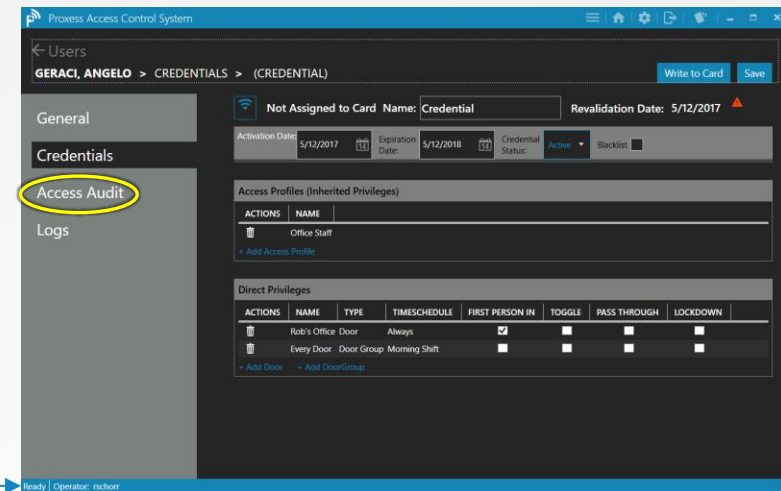
## Adding New Users & Credentials - 5



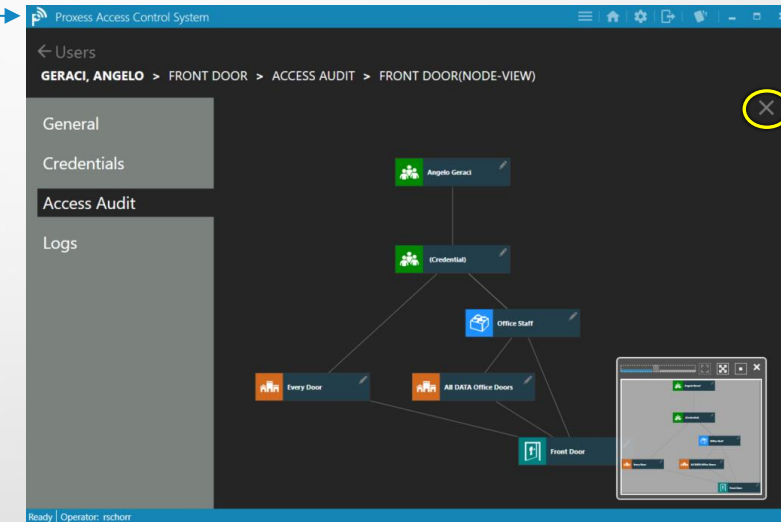
From the previous screen, this verification screen appears. Click "OK".



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.



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



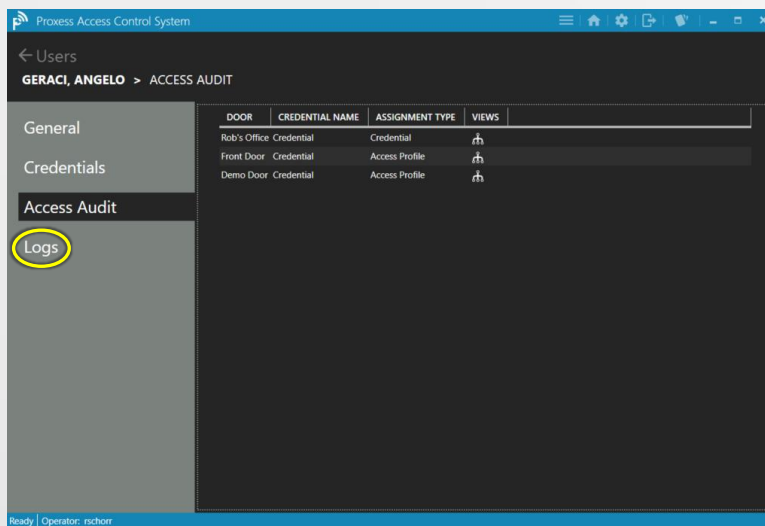
This Access Audit view shows the relationship between the cardholder and their credentials and the door selected on the previous screen.

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

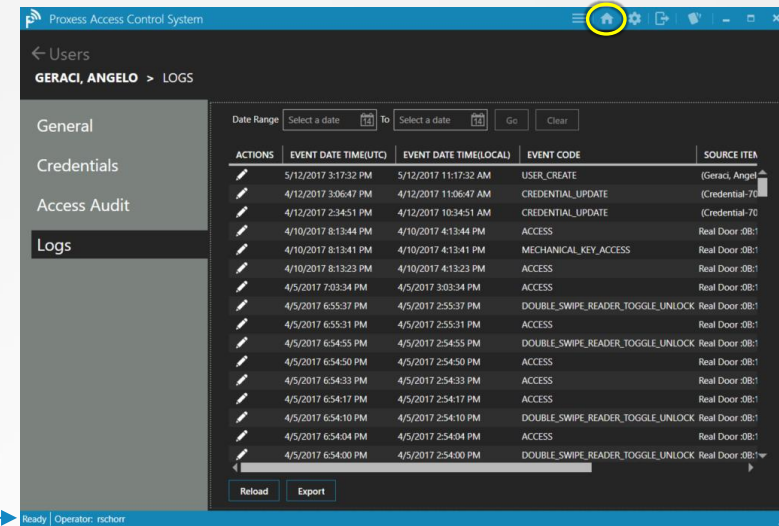




# Adding New Users & Credentials - 6

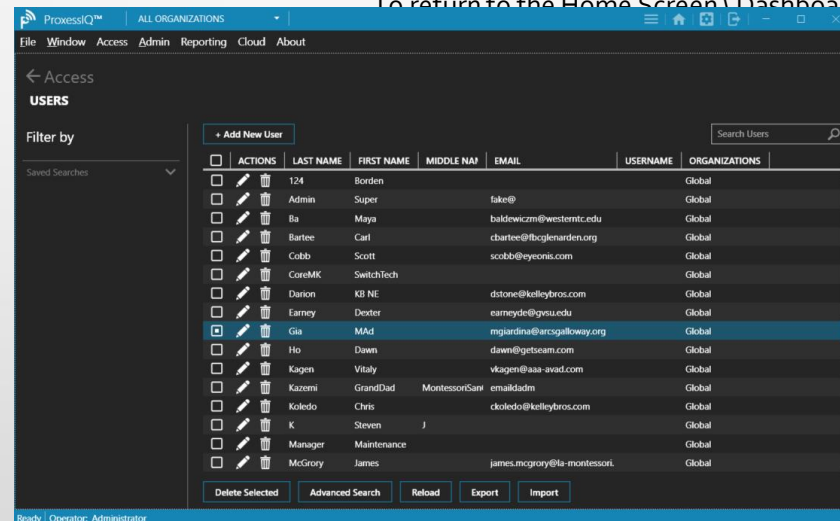


For a list of all of the recorded Events for a User, click "Logs".



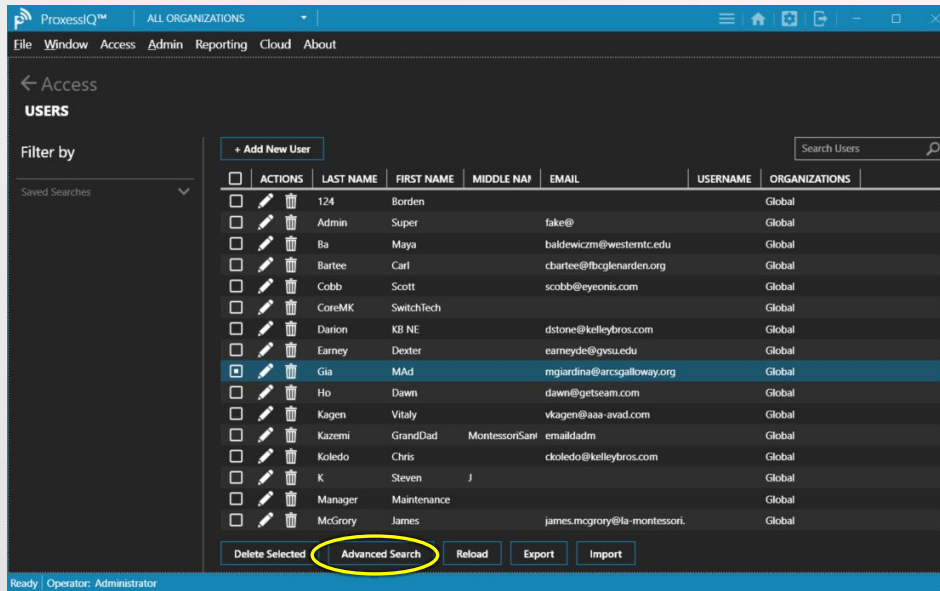
The Log lists every stored Event from that door. This list may be Exported as an Excel file by clicking the "Export" button at the bottom.

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

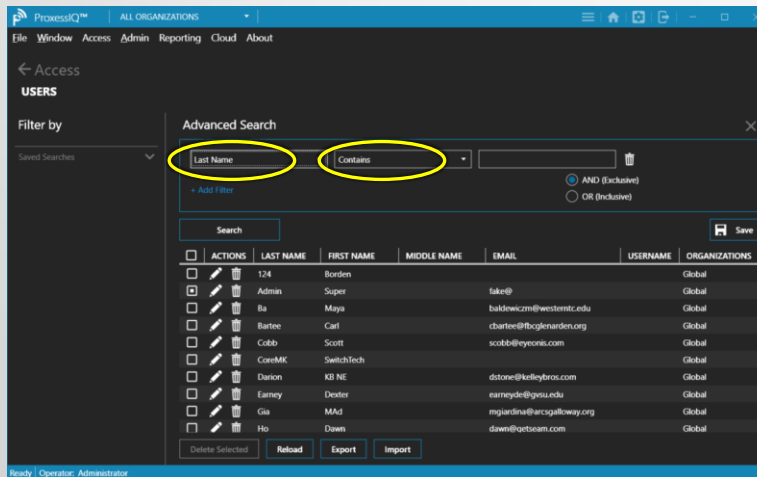




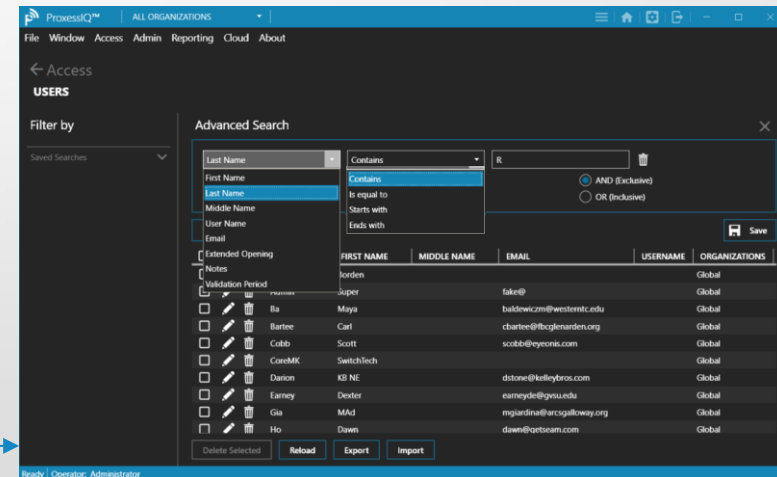
# Advanced Searches of Users



Within each User record



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





## Advanced Searches of Users

ACTIONS	LAST NAME	FIRST NAME	MIDDLE NAME	EMAIL	USERNAME	ORGANIZATION
<input type="checkbox"/>	T24	Borden				Global
<input type="checkbox"/>	Admin	Super		fakel@		Global
<input type="checkbox"/>	Ila	Maya		baldewiczr@westernm.edu		Global
<input type="checkbox"/>	Bartee	Carl		cbartee@fbcglenarden.org		Global
<input type="checkbox"/>	Cobb	Scott		scobb@eyenias.com		Global
<input type="checkbox"/>	CaeMK	Switchtech				Global
<input type="checkbox"/>	Darion	Nelly		dstone@kb.com	Science Department	Global
<input type="checkbox"/>	Eamery	Dexter		eameryd@yosu.edu		Global

Within each User record

ACTIONS	LAST NAME	FIRST NAME	MIDDLE NAME	EMAIL	USERNAME	ORGANIZATION
<input type="checkbox"/>	T24	Borden				Global
<input type="checkbox"/>	Admin	Super		fakel@		Global
<input type="checkbox"/>	Ila	Maya		baldewiczr@westernm.edu		Global
<input type="checkbox"/>	Bartee	Carl		cbartee@fbcglenarden.org		Global
<input type="checkbox"/>	Cobb	Scott		scobb@eyenias.com		Global
<input type="checkbox"/>	CaeMK	Switchtech				Global
<input type="checkbox"/>	Darion	Nelly		dstone@kb.com	Science Department	Global
<input type="checkbox"/>	Eamery	Dexter		eameryd@yosu.edu		Global

Save Advanced Search

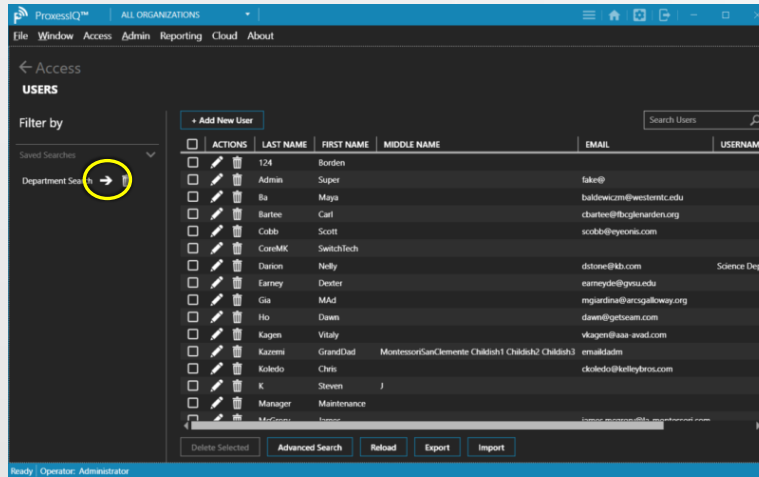
Search Name  
Department Search

OK Cancel

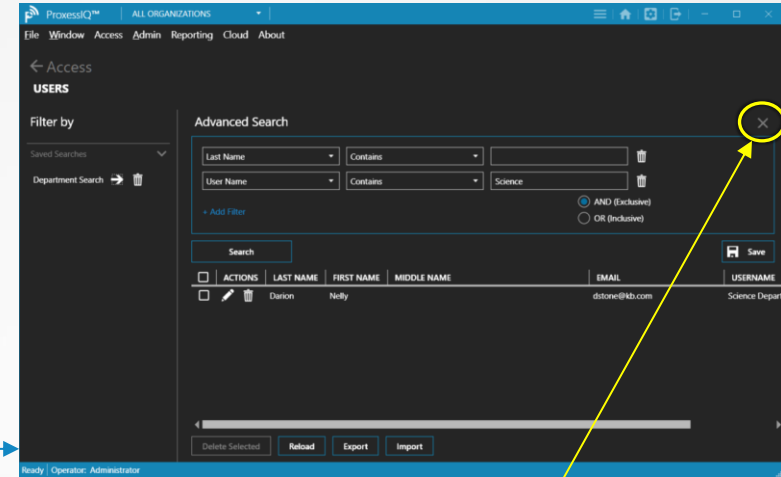
Name this search for your future use and click "OK".  
Your new custom search will now appear in this list, for later execution by this and other operators.  
When you have completed your Search, you must click "X" to bring you back to the full list of Users, or the User menu will continue to only show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



## Advanced Searches of Users



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



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



# USERS

## Adding & Editing

**Mobile Credentials** are addressed in this section.

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



Prior to entering and delivering mobile keys to Users, consider communicating to them the expected email they will receive and the installation process. This will result in fewer support calls and a better user experience.

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

**From:** [paul.hevesy@proxess.com](mailto:paul.hevesy@proxess.com) <[paul.hevesy@proxess.com](mailto:paul.hevesy@proxess.com)>  
**Date:** Thursday, May 11, 2023 at 5:56 PM  
**To:** Robert Schorr <[rob.schorr@proxess.com](mailto:rob.schorr@proxess.com)>  
**Subject:** Proxess Mobile Key Welcome Email

Dear [End User Staff & Team Members] -

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

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

HERE ARE THE STEPS YOU WILL NEED TO FOLLOW:

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



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

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

You have been invited to Proxess Mobile by Proxess Texas Demo

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

Today at 4:41 PM

## Proxess

### Invitation

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

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



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

Here are some things to note:

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

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

[OPEN THIS LINK](#)

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

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

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

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



# Adding New Users & Mobile Credentials - 2

ProvenIQ™  
← Users  
MANAGER, FACILITIES > GENERAL  
Save

General  
**Credentials**  
Access Audit  
Event Logs

add photo

First Name: Facilities  
Last Name: Manager  
Middle Name:  
Username:  
External Id:  
Validation Period: 60 Use Defaults ☒  
Pin Number:  
Email: rob.schorn64@gmail.com  
Extended Opening: ☐  
Notes:

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

ProvenIQ™  
← Users  
MANAGER, FACILITIES > CREDENTIALS  
Add New Credential  
Reload Blacklist All Credentials

General  
**Credentials**  
Access Audit  
Event Logs

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

ProvenIQ™  
← Users  
MANAGER, FACILITIES > CREDENTIALS > CREDENTIAL  
Write to Card Save

General  
**Credentials**  
Access Audit  
Event Logs

Not Assigned to Card Name: **FM Mobile Credential** Remote Mobile Device Enrollment: Any

Activation Date: 2/15/2021 Expiration Date: 2/15/2022 Credential Status: Active Blacklist: ☐ Mobile Credential: ☒

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"

ProvenIQ™  
← Users  
MANAGER, FACILITIES > CREDENTIALS > CREDENTIAL  
Write to Card Save

General  
**Credentials**  
Access Audit  
Event Logs

Not Assigned to Card Name: FM Mobile Credential Remote Mobile Device Enrollment: Any

Activation Date: 2/15/2021 Expiration Date: 2/15/2022 Credential Status: Active Blacklist: ☐ Mobile Credential: ☒

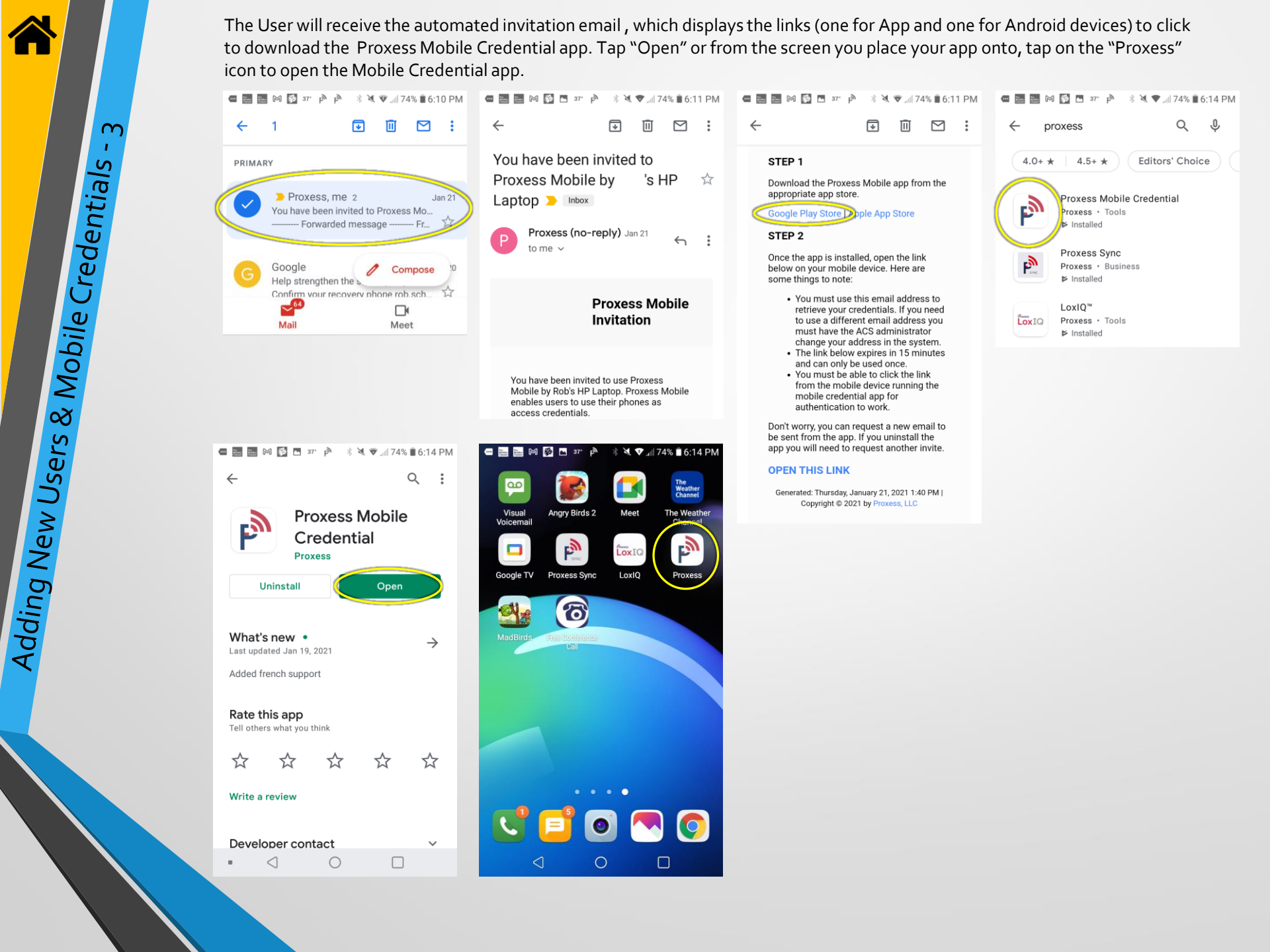
Access Profiles (Inherited Privileges)

ACTIONS	NAME	TYPE	TIMESCHEDULE	FIRST PERSON IN	TOGGLE	PASS THROUGH	LOCKDOWN
<input checked="" type="checkbox"/>	Lakeside, South	Door	Always	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Engineering Department	Door Group	Always	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

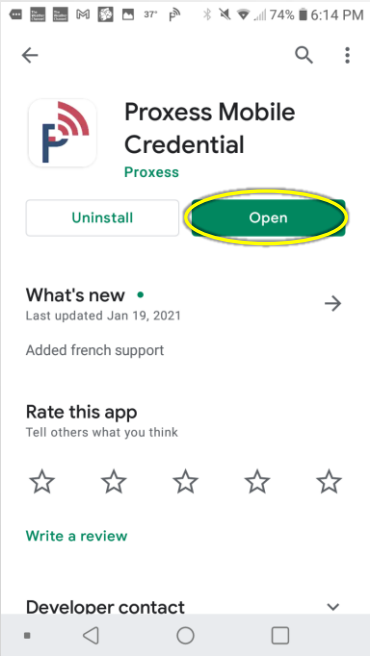
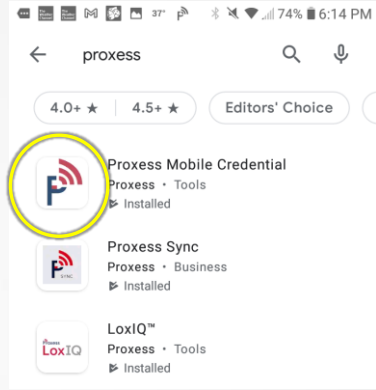
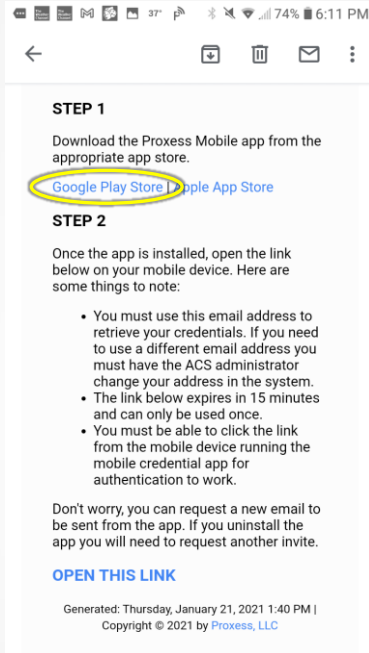
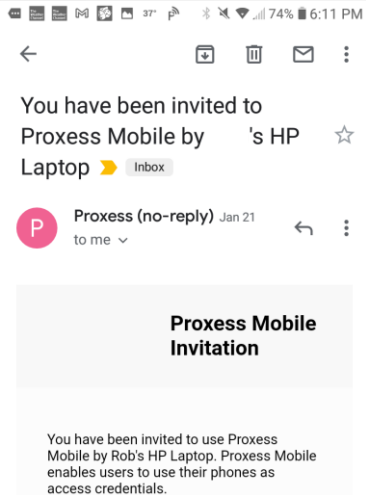
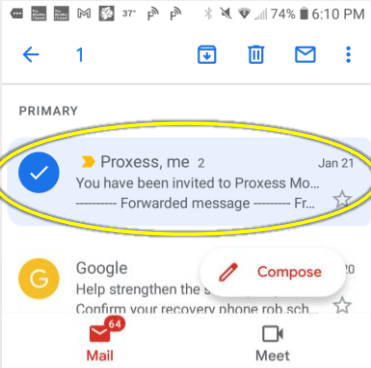
Add Door Add DoorGroup

You may now assign Privileges (a.k.a. access rights) for this Mobile Credential, as defined in the previous section.  
In this case we will assign the Privilege for this credential to access the Door Group Engineering Department, during the Time Schedule Always and the individual Door Lakeside, South, also during the Time Schedule Always.  
When you are done, click "Save" and the mobile credential email invitation will be delivered to the recipient.  
Toggle & Lockdown views will be shown in a few pages from here.





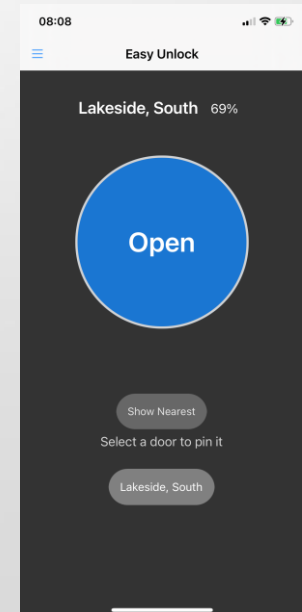
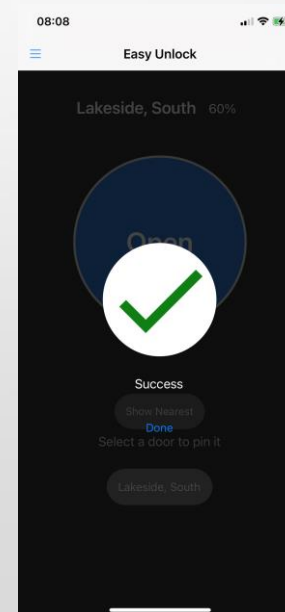
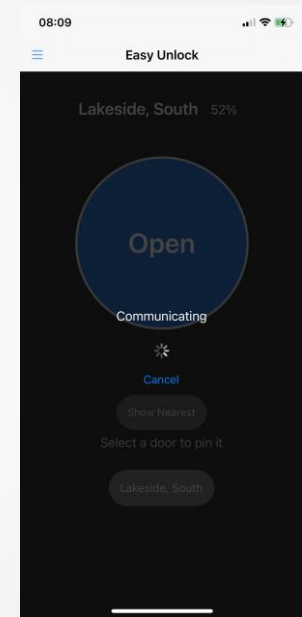
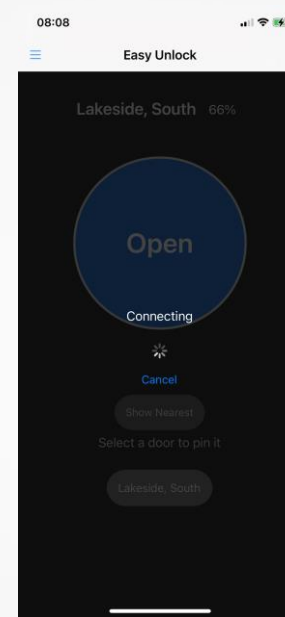
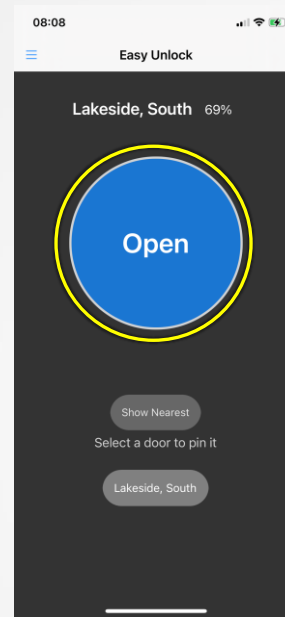
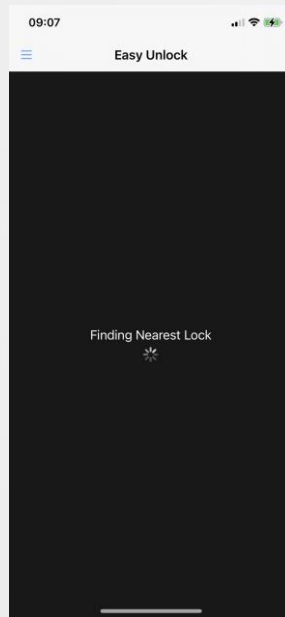
The User will receive the automated invitation email , which displays the links (one for App and one for Android devices) to click to download the Proxess Mobile Credential app. Tap "Open" or from the screen you place your app onto, tap on the "Proxess" icon to open the Mobile Credential app.







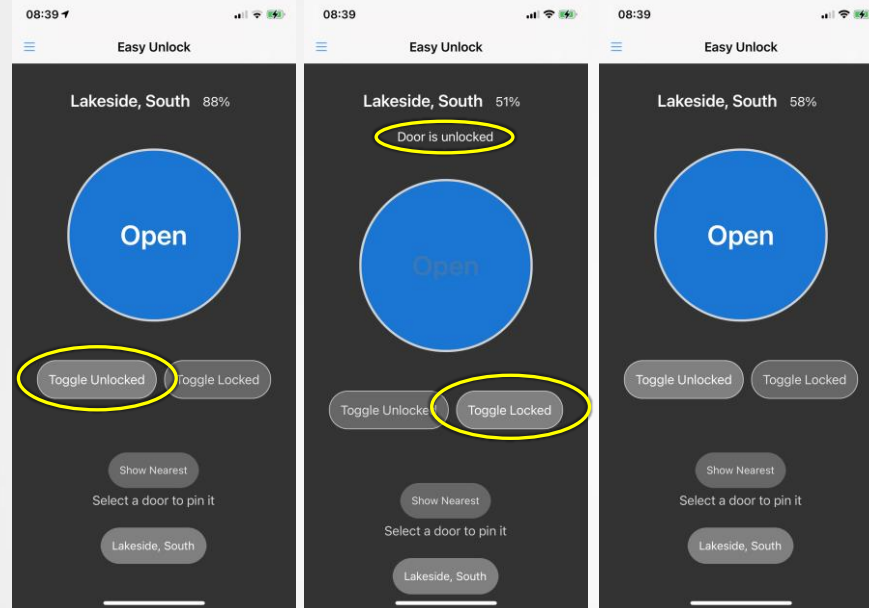
The Mobile Credential app will open in “Easy Unlock” mode, where it will automatically find and display the door with the greatest signal strength (usually the closest door as well). Tap the “Open” button for the door you wish to access and it will unlock. For the best user experience, open your app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





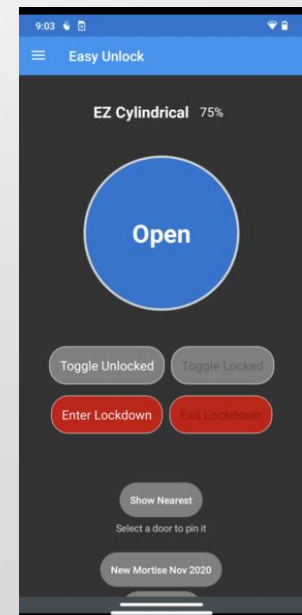
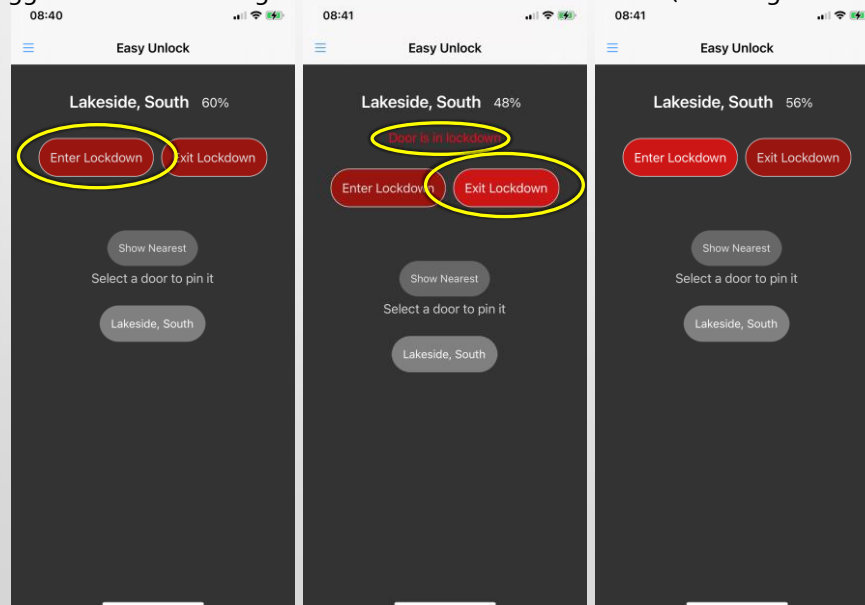
When creating a Mobile Credential, you may assign Toggle rights. In this case, the “Toggle Unlocked” and “Toggle Locked” buttons will display. Toggled locks remain Unlocked (no credential required to enter) until either Toggled Locked or until the next Time Schedule occurs requiring the lock to be in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

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



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

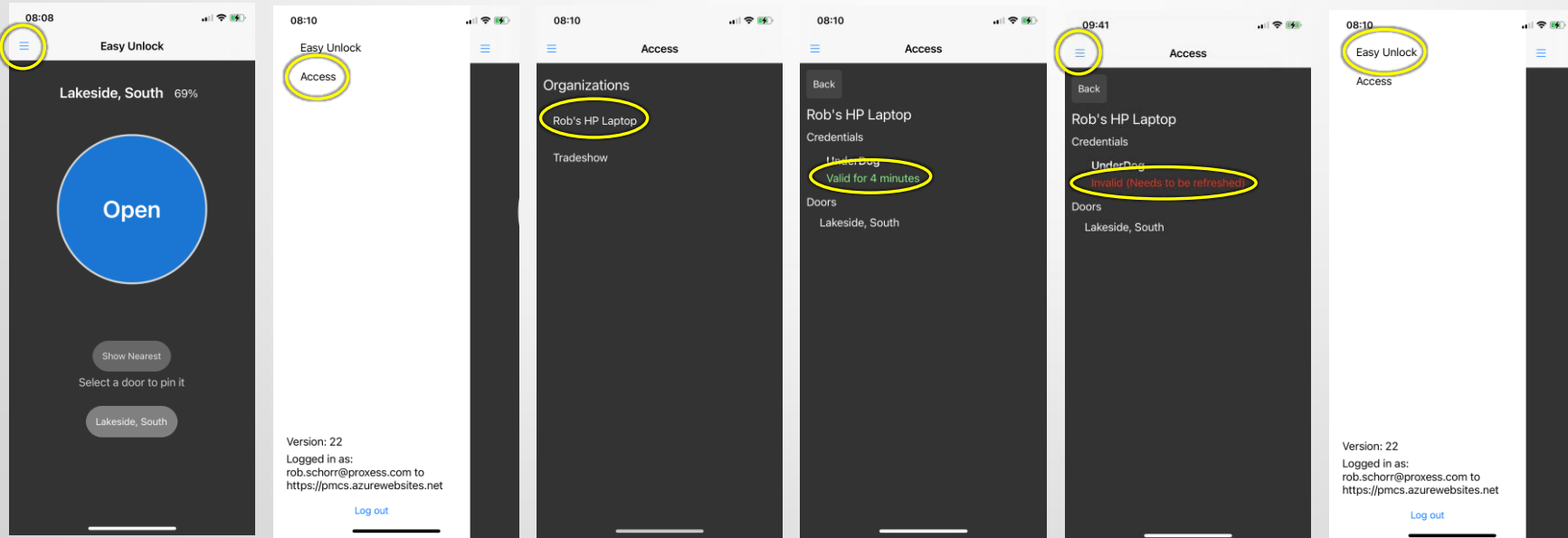
When the lockset has entered the Lockdown mode, a note in red will display. Once removed from the Lockdown mode the note will be removed.





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

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



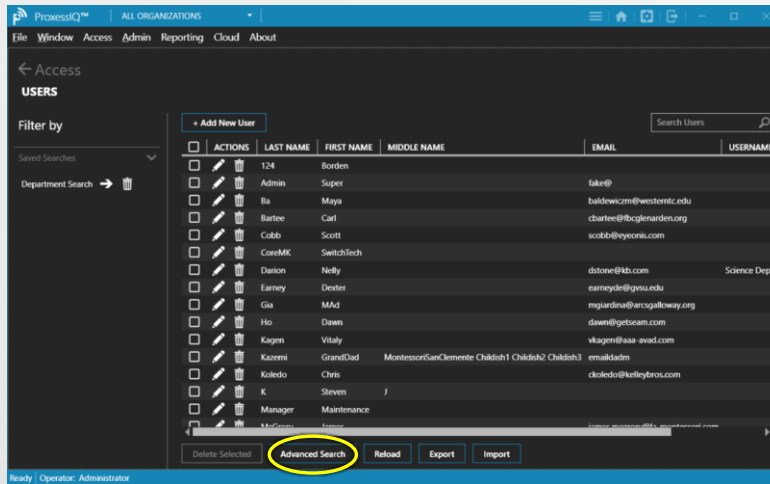


# USERS

## Spreadsheet Adding & Editing

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

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



To make mass User additions, changes or deletions, no program is simpler or more flexible than Microsoft Excel or Google Sheets.

Proxess can import a .csv formatted file from those programs or Notes, etc., with an unlimited number of Users entered, for mass-card entry, deletion or changes.

We will now explain to columns of detail that can be added, their format requirements and how to perform the imports and exports.

For reference, these are the overall views of all the fields that can be imported & exported and we will enlarge them and explain each field on the following pages.

Import List snapshot:

1	ExternalId	FirstName	LastName	MiddleName	UserName	Email	PinCode	ExtendedOpening	Notes	OrganizationGuid	ShareWithChildrenOrgs	CredentialName	CredentialActivationDateTime	CredentialExpirationDateTime	EnableMobileCredential	AccessProfileList	CredentialPrintedNumber	CredentialStatus	BlockList	Removal	ForceUpdate	ImportStatus
2		Angelica	Altadena			tadenala@hp.com		FALSE		00000000-0000-0000	FALSE	Tom Mobile   Tom Lockdown	5/18/2023 0:00	5/18/2026 0:00	TRUE	Bldg1   Principal   ...		Other	FALSE	FALSE	FALSE	ReadyForImport
3		Johnathan	Fitzpatrick			jfitz@stateu.com		FALSE		00000000-0000-0000	FALSE	John Fob   John Mobile	5/18/2023 0:00	5/18/2026 0:00	TRUE	Frosh Dorm   Gym   Bio		Other	FALSE	FALSE	FALSE	ReadyForImport
4		Johnathan	Weismuller			johnnyawims@k12.va.us		FALSE		00000000-0000-0000	FALSE	Credential	5/18/2023 0:00	5/18/2026 0:00	TRUE			Other	FALSE	FALSE	FALSE	ReadyForImport
5		Claudia	Caudillo			claudia.caudillo@gmail.com		FALSE		00000000-0000-0000	FALSE	Credential	5/18/2023 0:00	5/18/2026 0:00	TRUE			Other	FALSE	FALSE	FALSE	ReadyForImport
6		Lorena	Veracruz			veracruz@yahoo.com		FALSE		00000000-0000-0000	FALSE	Credential	5/18/2023 0:00	5/18/2026 0:00	TRUE			Other	FALSE	FALSE	FALSE	ReadyForImport
7		Violet	Morrison			v.morrison@proxess.invald		FALSE		00000000-0000-0000	FALSE	Credential	01/01/0001 00:00:00	01/01/0001 00:00:00	FALSE			Other	FALSE	FALSE	FALSE	ReadyForImport
8																						
9																						

Export List snapshot:

1	ExternalId	Last Name	First Name	Middle Name	Email	Username	Organizations	Notes	PinCode	ExtendedOpening
2		124	Borden				Global			FALSE
3		Admin	Super		fake@		Global			FALSE
4	684f1dca-a3c0-4	Altadena	Angelica		tadenala@hp.com		Global			FALSE
5		Ba	Maya		baldeviczm@westernct.edu		Global			FALSE
6		Bartee	Carl		cbartee@fbcglenarden.org		Global			FALSE
7	368c6807-55d9-4	Caudillo	Claudia		claudia.caudillo@gmail.com		Global			FALSE
8		Cobb	Scott		scobb@eyeonis.com		Global			FALSE
9		CoreMK	SwitchTech				Global			FALSE

# Mass Adding/Importing and Editing Users, using a .csv spreadsheet

Import List snapshot (Page 1 of 3):

Note: The column order may not be altered from the below and the exact headers must appear, as shown.

A	B	C	D	E	F	G	H	I	J	K
ExternalID	FirstName	LastName	MiddleName	UserName	Email	PinCode	Extended Opening	Notes	Organiza tionGuid	ShareWith ChildrenOrgs

**ExternalID:** Not required to be entered by the end user. Will otherwise be automatically assigned by the system. This is a unique identifier and may not be changed, or the entry will be treated as a second/additional user entry. The User's existing ExternalID must be included here for subsequent data imports.

**FirstName:** No minimum or maximum characters

**LastName:** No minimum or maximum characters

**MiddleName:** No minimum or maximum characters May be used for "Custom", sortable data (Staff, Student, Administrator, Leadership, Building, Department, etc.)

**UserName:** No minimum or maximum characters. May be used for "Custom", sortable data (Staff, Student, Administrator, Leadership, Building, Department, etc.).

**Email:** No minimum or maximum characters. This is the email that will receive Notifications and Mobile Keys

**PinCode:** Not currently used

**ExtendedOpening:** Enter "TRUE" if this credential-holder will receive the extra time to open the door and "FALSE" if they won't.

**Notes:** No minimum or maximum characters. May be used for "Custom", sortable data (Staff, Student, Administrator, Leadership, Building, Department, etc.)

**OrganizationGuid:** Not required to be entered by the end user. Will otherwise be automatically assigned by the system, uniquely for each the "Global" and "Child" Organizations. This is a unique identifier and may not be changed, or the credential will not be added correctly and may be unusable. The User's existing OrganizationGuid must be included here for subsequent data imports. "Organizations" is a separately licensed feature.

**ShareWithChildrenOrgs:** Enter "TRUE" if this credential may be seen and managed by Operators of downstream/Child Organizations.

# Mass Adding/Importing and Editing Users, using a .csv spreadsheet

Import List snapshot (Page 2 of 3):

Note: The column order may not be altered from the below and the exact headers must appear, as shown.

L	M	N	O	P	Q	R	S	T	U	V
Credential Name	CredentialActivation DateTime	CredentialExpiration DateTime	EnableMobile Credential	Access ProfileList1	Credential PrintedNumber	Credential Status	BlockList Credential	Remove User	Force Update	ImportStatus
Tom Mobile	5/18/2023 0:00	5/18/2026 0:00	TRUE	Bldg1		Other	FALSE	FALSE	FALSE	ReadyForImport

**CredentialName:** Not required to be entered by the end user. Especially when multiple credentials are issued to a User, individually naming each credential allows for more obvious and quicker recognition and sorting in the Event Logs. Especially important where there may be multiple credentials delivered to a single room/dorm/household. No minimum or maximum characters

**CredentialActivationDateTime:** The day & time this credential will begin to operate on its doors. This format must be followed precisely for the date and time (Military format: hours:minutes)

**CredentialExpirationDateTime:** The day & time this credential will cease operating on its doors and will need to be re-encoded on an ENR enrollment reader in order to begin working on doors again. This format must be followed precisely for the date and time (Military format: hours:minutes)

**EnableMobileCredential:** Enter "TRUE" if this credential will be a mobile key (mobile phone credential). Otherwise enter "FALSE", or leave it blank.

**AccessProfileList1:** Enter all the APs (Access Profiles) for this credential. Separate each AP with a "|" (e.g. "Building Amenities|Athletic Center"). A maximum of 12 Aps can be entered into this cell and thus applied to a single credential, for a maximum of 12 total privileges (which is the maximum number of Direct Privileges [a combination of Doors & Door Groups] that a single credential may have).

**CredentialPrintedNumber:** The number printed on the physical credential. This is purely a visual reference and for easier look up and in the future will be used for using 3<sup>rd</sup> part credentials.

**CredentialStatus:** Enter Active, Returned, Damaged, Lost, Deactivated, Other. Leave it blank for no change to be made to the database.

**BlocklistCredential:** Enter "TRUE" if this credential must be denied and never allowed access, until an Admin resets it.

**RemoveUser:** Enter "TRUE" if this User is to be deleted from the database & not just deactivated. Enter "FALSE" otherwise.

**ForceUpdate:** Enter "TRUE" if there are changes to the User that you are certain you wish to have update the existing database record...Otherwise, enter "FALSE". If there is an existing Credential for the User, the User will be removed from the search list, but their credential will remain in the Credential menu until it is deleted. Then the credential and user will both be gone.

**ImportStatus:** Enter "ReadyforImport" if this User may be added or updated at this time. Otherwise, if, for instance, their rights area still being determined, enter "FALSE".





# Mass Exporting of Users, using a .csv spreadsheet

Export List snapshot (Page 1 of 1):

For reference, these are the overall views of all the fields that will be exported.

Once you download it and open it with Excel or Sheets, you may make your global changes

Do not make any additional user additions in the software until you have made changes to this export and have then re-imported it.

Note: The column order may not be altered from the below and the exact headers must appear, as shown.

A	B	C	D	E	F	G	H	I	J
ExternalId	Last Name	First Name	Middle Name	Email	Username	Organizations	Notes	PinCode	ExtendedOpening
684f1dca-a3c0-4	Altadena	Angelica		tadenala@hp.com		Global			FALSE
368c6807-55d9-4	Caudillo	Claudia		claudia.caudillo@gmail.com		Global			FALSE

**ExternalID:** This field will automatically be assigned by the system – if it was not already entered by the customer. This is a unique identifier and may Not be changed, or the next time it is imported, it will be treated as a second/additional user entry. Thus, the User's existing ExternalID must be included here for subsequent data imports.

**FirstName:** No minimum or maximum characters

**LastName:** No minimum or maximum characters

**MiddleName:** No minimum or maximum characters May be used for "Custom", sortable data (Staff, Student, Administrator, Leadership, Building, Department, etc.)

**Email:** No minimum or maximum characters. This is the email that will receive Notifications and Mobile Keys

**UserName:** No minimum or maximum characters. May be used for "Custom", sortable data (Staff, Student, Administrator, Leadership, Building, Department, etc.).

**Organizations:** Multiple Organizations can be entered here, using the "|" character (e.g. Global|Building 1).

**Notes:** No minimum or maximum characters. May be used for "Custom", sortable data (Staff, Student, Administrator, Leadership, Building, Department, etc.)

**PinCode:** Not currently used

**ExtendedOpening:** Enter "TRUE" if this credential-holder will receive the extra time to open the door and "FALSE" is they won't.

*Note: When using sortable fields, you may sort by the group you wish to make a field change to and then copy & paste that parameter change to just the credentials in that group. Then you may re-import this spreadsheet.*



## How to make mass changes to the rights for a User Group:

- *Instant Holiday calendar addition:* Give Holiday access to only the group you want to keep allowing access to. Extend the Holiday for as long as desired.
- *Instant Access Profile change:* Delete a "Door Group A" from the AP, which the Users you want to exclude have access to. Leave a duplicate "Door Group B" which only the Admin team have access to. Add "Door Group A" when the event is over.
- *Export & Import spreadsheet:* Export all users of a particular group (e.g. Admin, Leadership, Teachers, Coaches, HS Teachers, Staff, Contractors), using a custom field (e.g. MN, UN, Notes). Change their AP according to their updated rights/restrictions(e.g. Days, Doors, MK operation) & re-import the file.



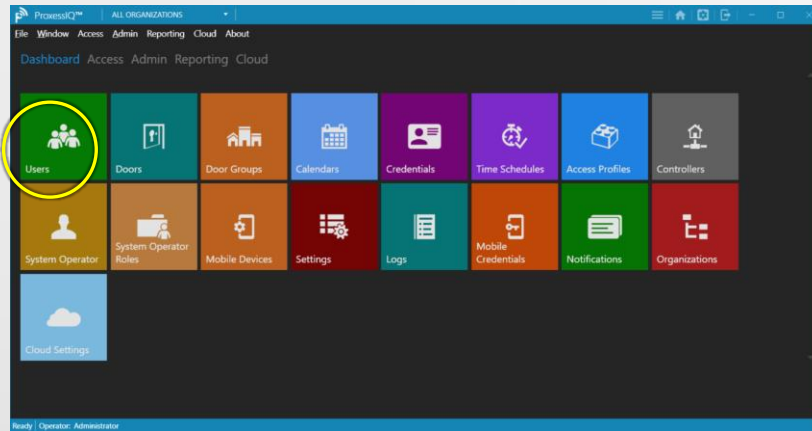
USERS

Encoding & Wiping Cards/Fobs/  
Wristbands/Stickers

with the **ProxessIQ™** Software



# Encoding Physical Credentials using the ProxessIQ™ Software



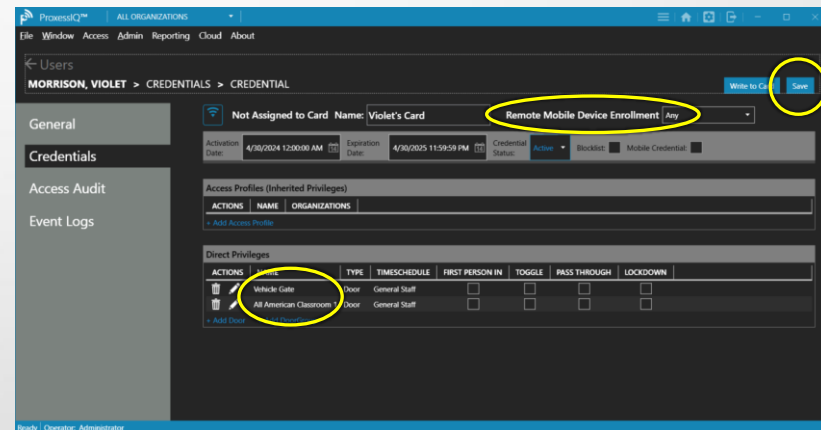
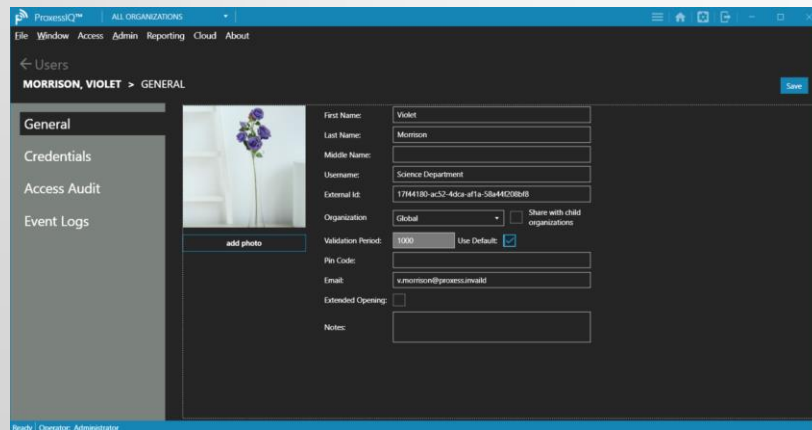
A credential (card, keyfob, sticker, watchband) must first be created in the software and then it can be encoded with the software, by plugging a n Enrollment Reader (ENR) into a USB port (USB 3.0 is optimal) the local PC that the client software is installed on. Note that the enrollment reader will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

Go to the Users menu.

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

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

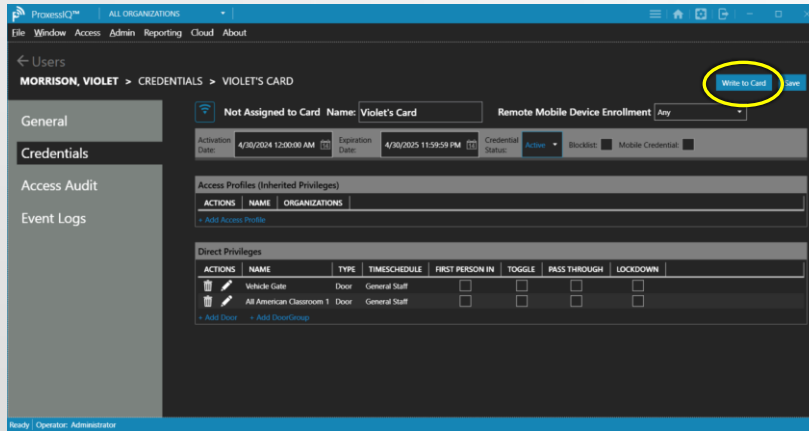
The "Write to Card" button will become illuminated, enabling the encoding process.



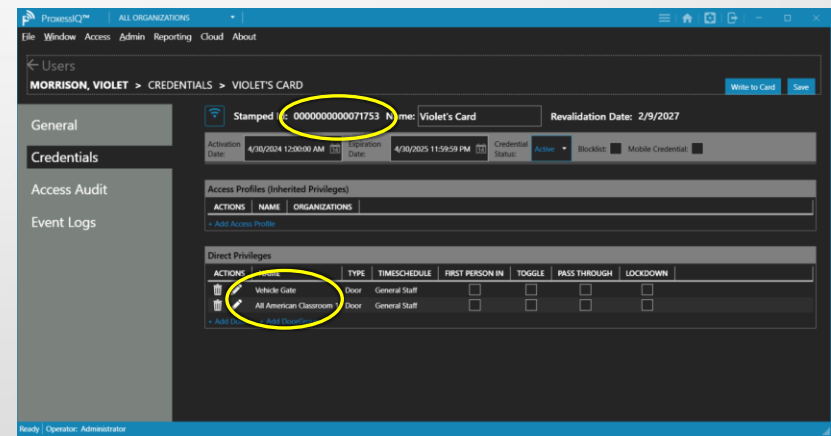


## NOTES for SUCCESSFUL CREDENTIAL ENCODING, READING & DELETING

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

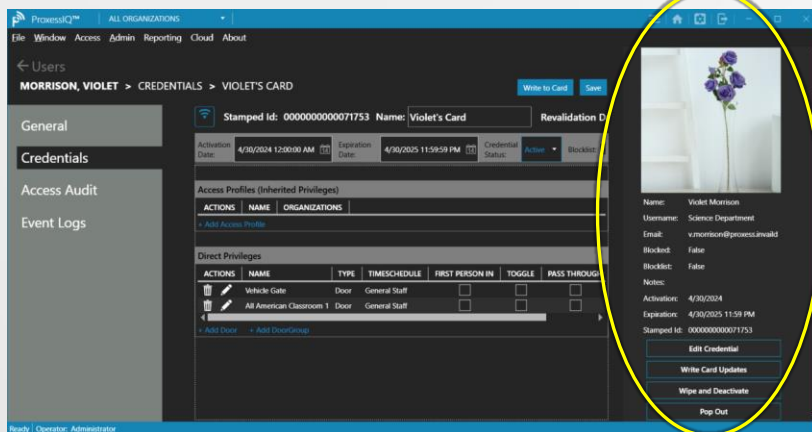


- If you are certain the credential (card/keyfob/sticker/watch) to encode has not already been encoded, then click on "Write to Card"
- Immediately place and hold the credential on the ENR until the blue LED appears and the screen to the right appears
- This shows the credential has been encoded with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



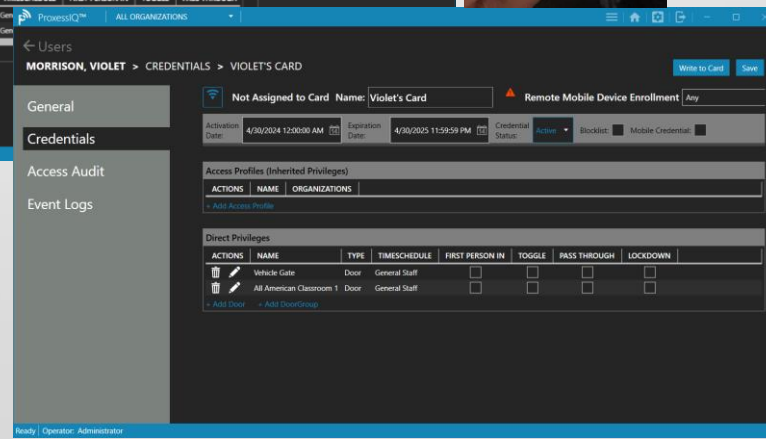
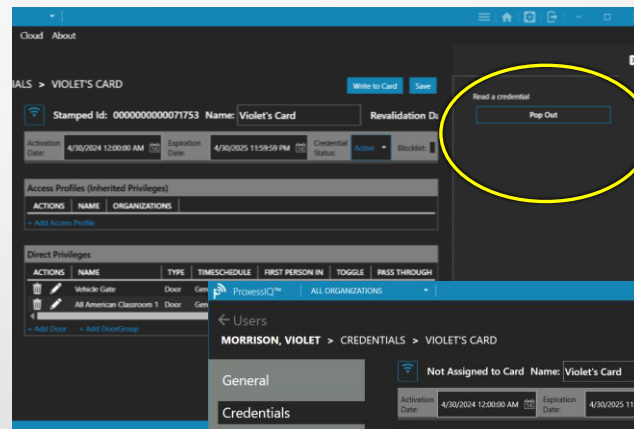
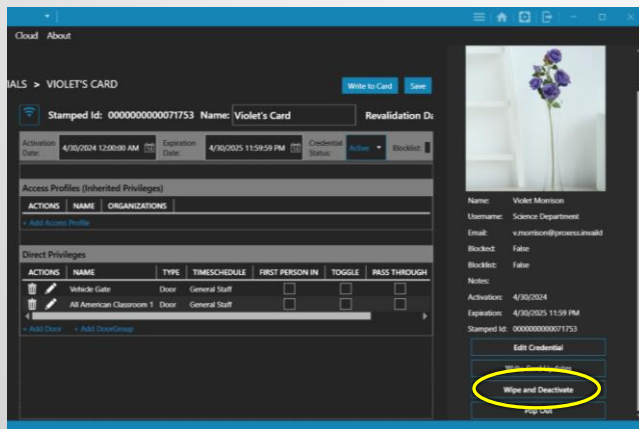


## Verifying and Deleting (Wipe) a Credential



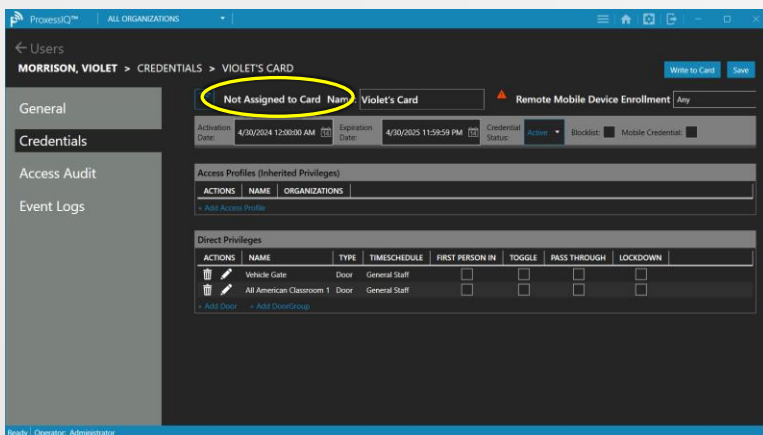
To Wipe/Delete a credential, or if you are uncertain if the credential (card/keyfob/sticker/watch) to encode has already been encoded:

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



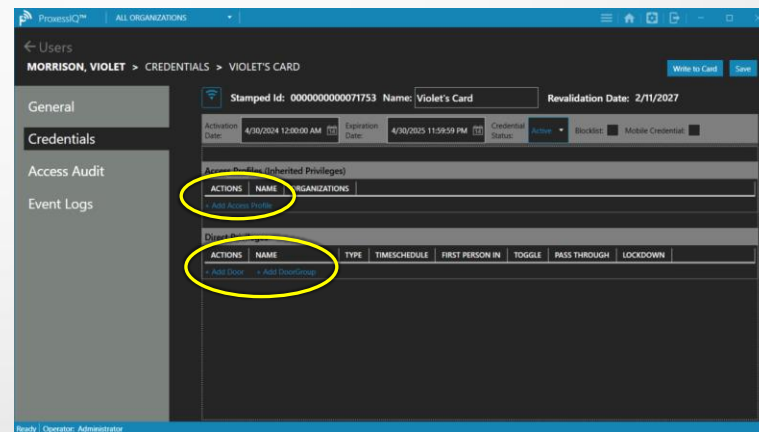
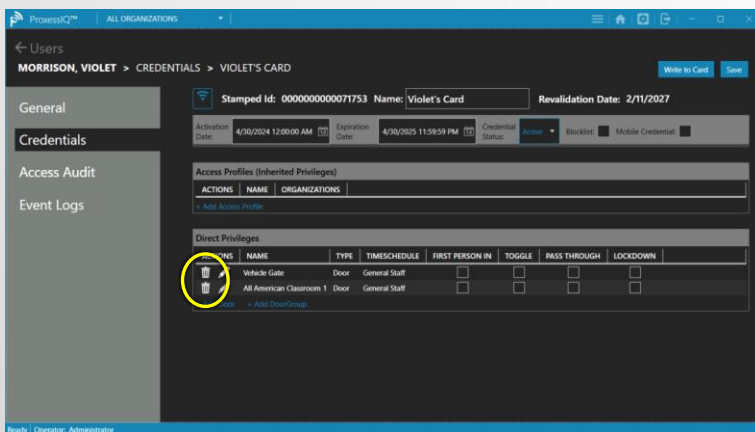


## Verifying and Deleting (Wipe) a Credential



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

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



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

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

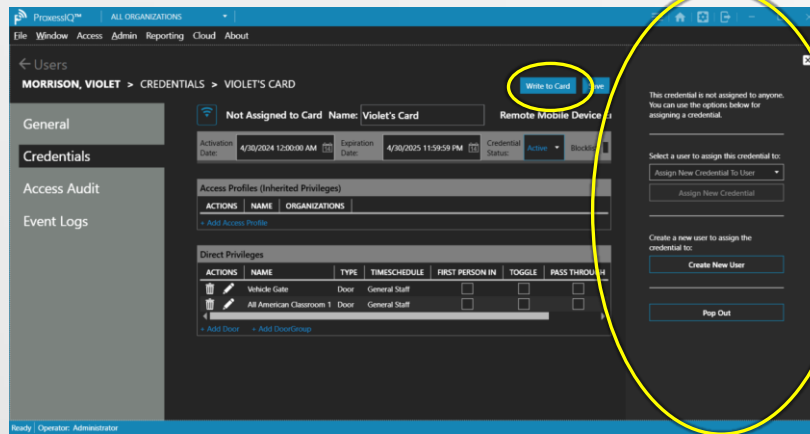
**Note:** If further action is desired, it is best Not to just delete a credential....**First**, Wipe the credential on an enrollment reader, or delete its Privileges/rights and have it presented to an online controller's reader, which will have its rights wiped.

**Note:** It is also a best practice to have each card's Validation be configured to as few days as possible, ensuring that even if a rouge credential is presented to an offline lock, it will be rejected.

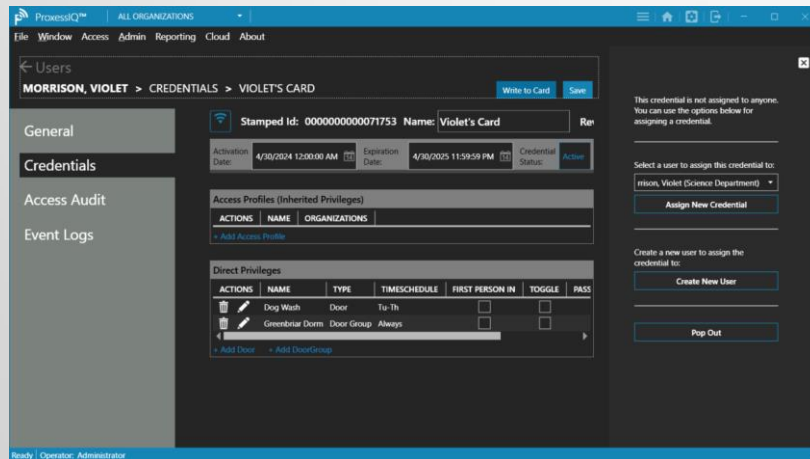
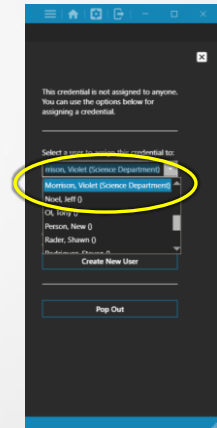
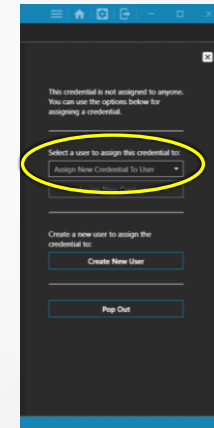
**Note:** If there no online doors, then check the Blocklist box for the credential and the Proxess Sync app must be presented to each offline lock that they had the rights to.



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



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

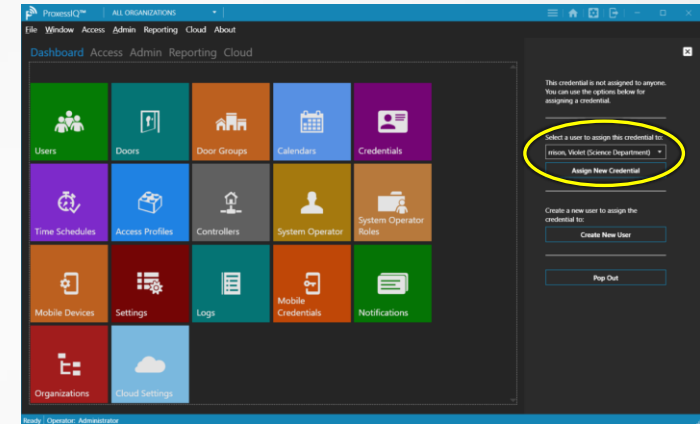
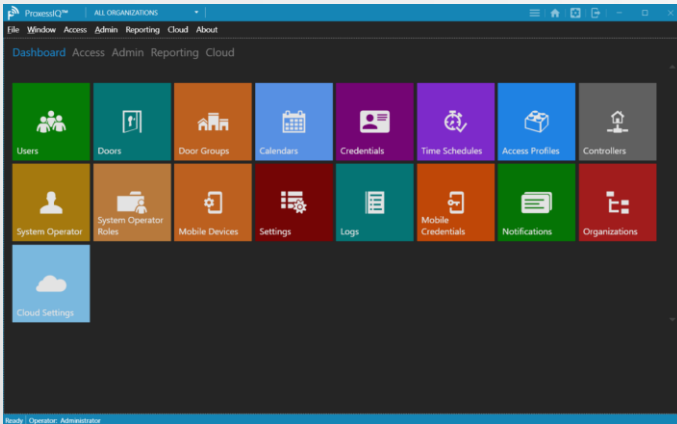






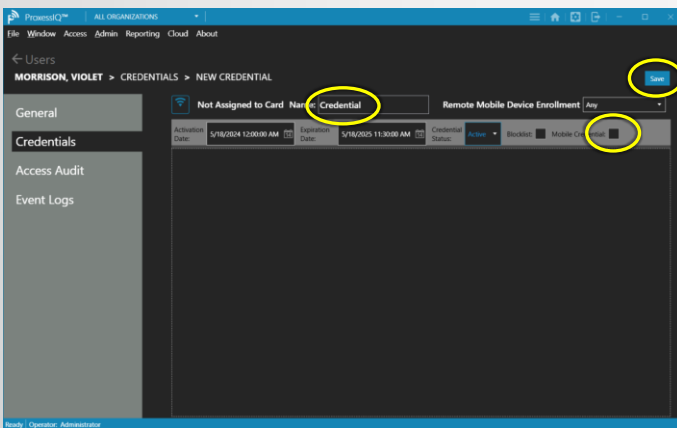
## Another way to Encode a Card

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

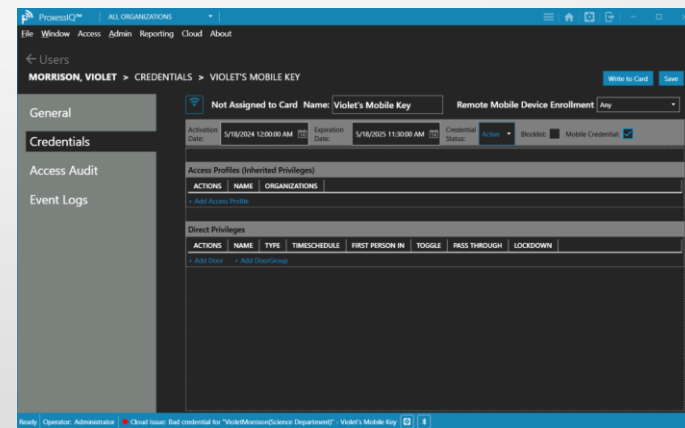


From any screen in the system, take an unencoded card and place it on to the ENR. The light will turn blue and the pop-up window will appear.

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

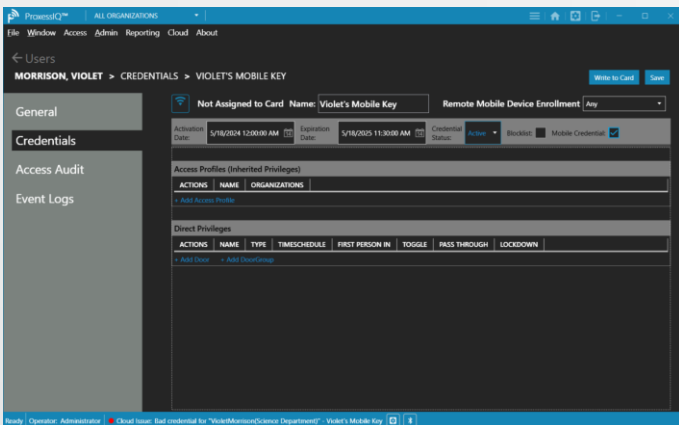


The Add New Credential window opens. Optionally add a Name for it, in this case check the "Mobile Credential" box and click "Save".

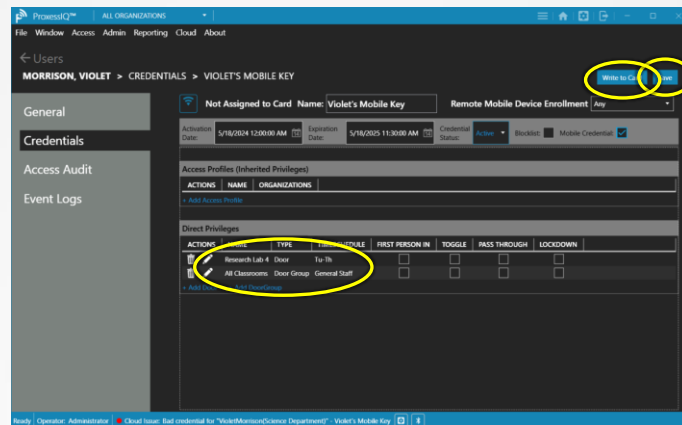


Enter the information for their new credential (a mobile phone key in this case) and add their access rights as described in previous sections.

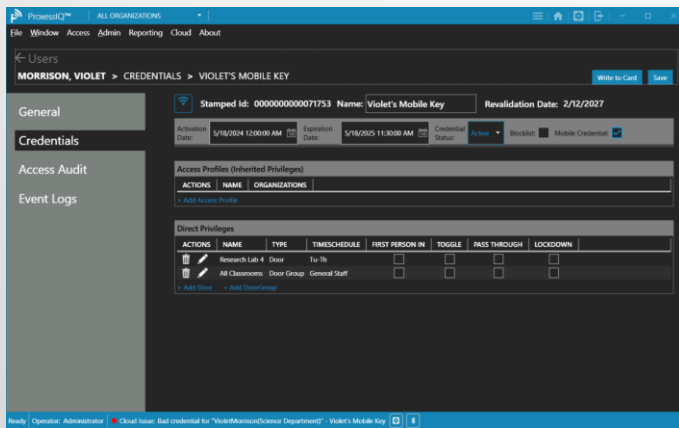




Enter the information for their new credential (a mobile phone key in this case) and add their access rights as described in previous sections.



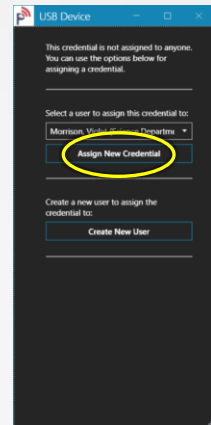
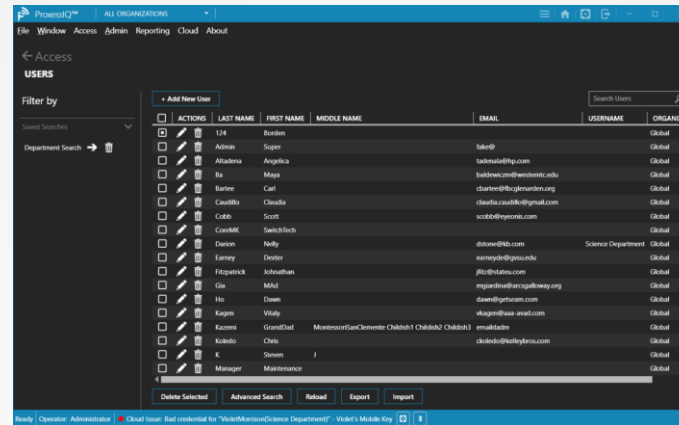
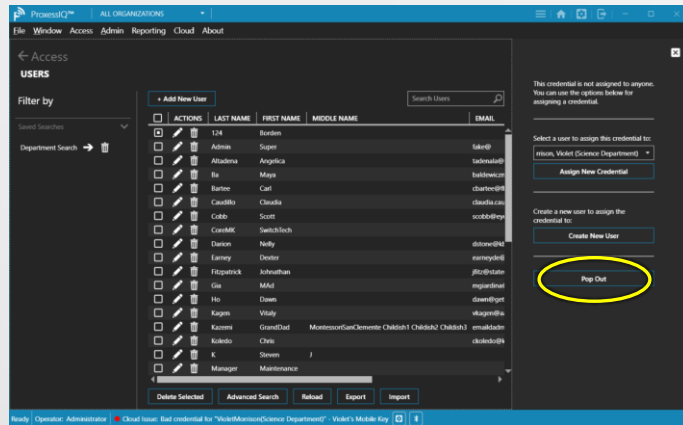
Select their Door and Door Group Privileges. Remember to keep all credentials away from the ENR until this point. Now click "Save" and then click "Write to Card".



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



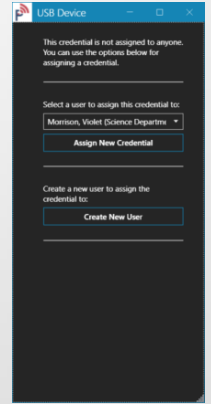
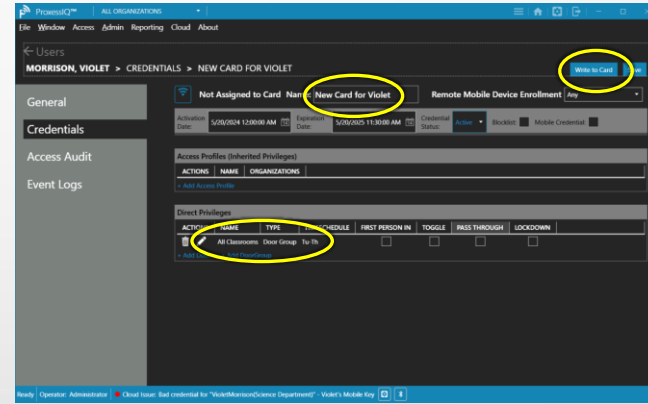
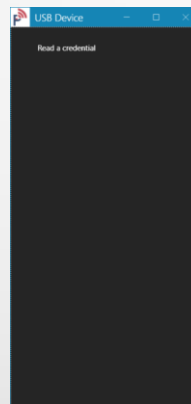
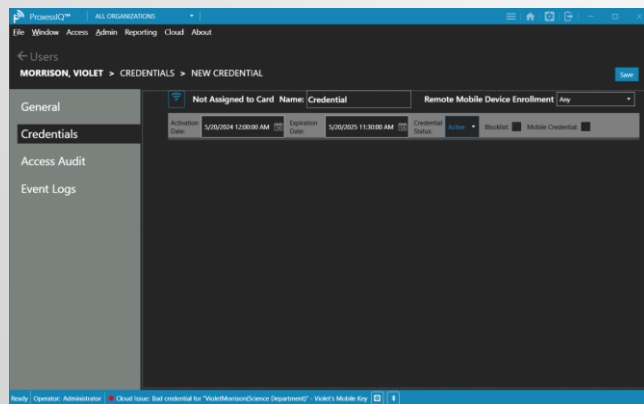
# Pop-Out Window: Another way to Encode a Card



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

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

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



A New Credential window for the selected User will open.

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

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

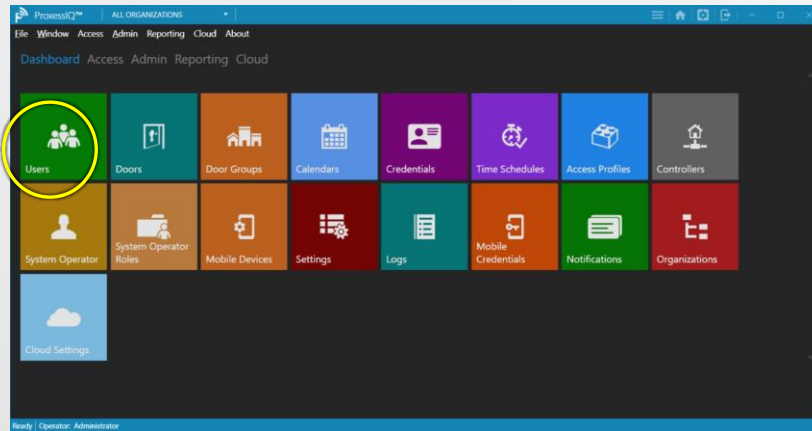


USERS

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

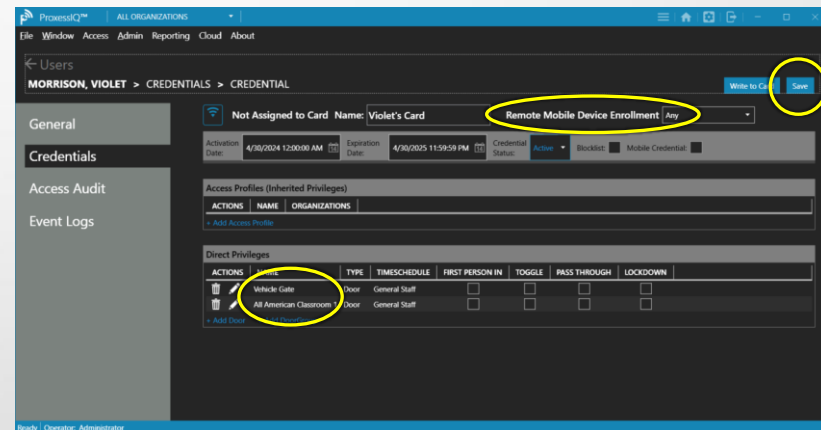
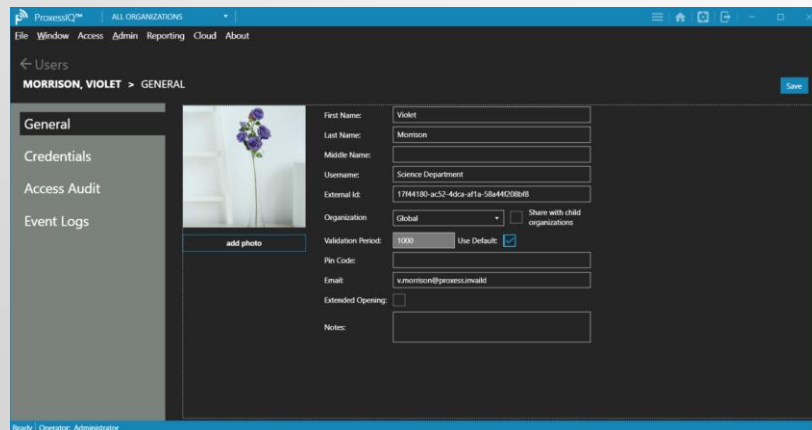


# Encoding Physical Credentials using the Proxess Sync app



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

Go to the Users menu.  
Add a User and then add a Credential (as shown in a prior section).  
Assign the rights to be assigned to that credential.  
Select a Mobile Device (or All of them) that will be allowed to create or edit this card.

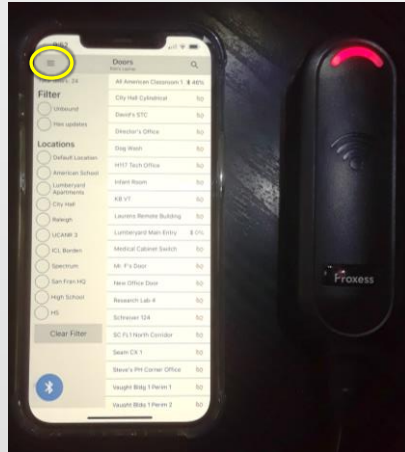




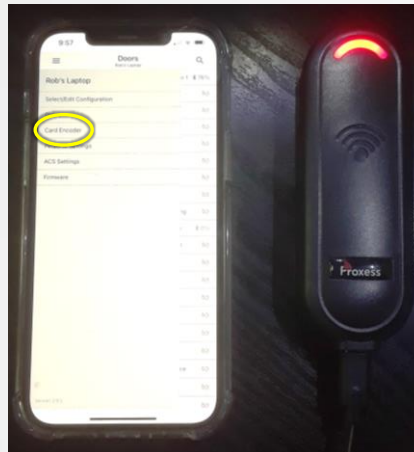
# Encoding Physical Credentials using the Proxess Sync app



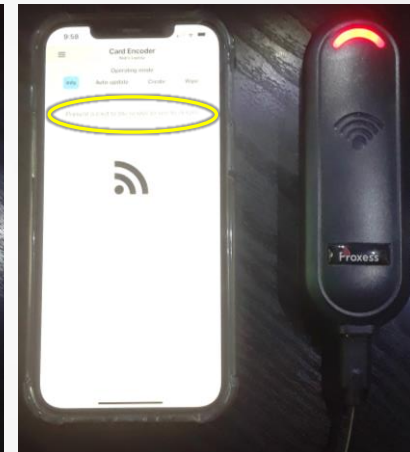
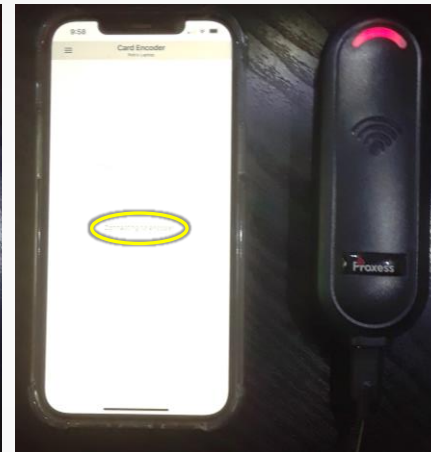
Open the Proxess Sync app on your phone  
Plug an Enrollment Reader (ENR) into a power source: A wall plug, a USB (A or C) port of a PC, or your phone or tablet (Android and iPhone 15 and above)



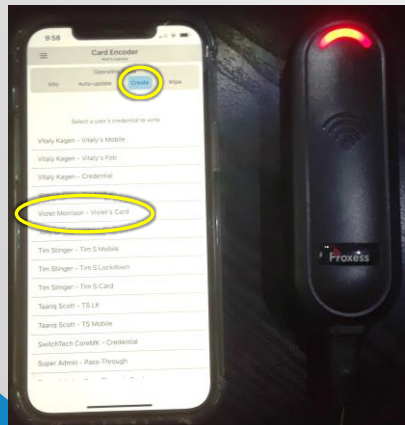
Tap the Menu ("Hamburger") icon.



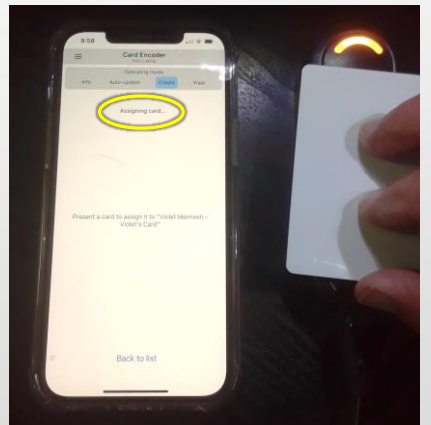
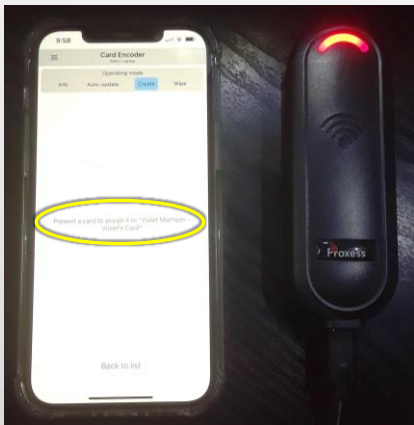
Tap "Card Encoder" and make sure the Enrollment Reader (ENR) is within 12" for the initial connection. The screen will state that it is looking for the ENR. Once connected, the ENR can be up to 20' away.



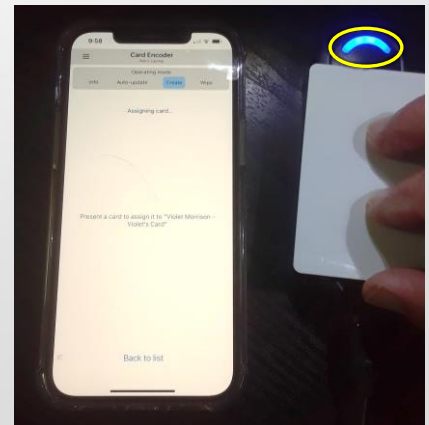
Once bound to an ENR, the screen will state it is ready for a credential to be presented.



Tap the "Create" button and a list of all Credentials that this operator is allowed to encode is presented. Tap on the name whose credential you will encode and you will be prompted to place the credential on the ENR.



Place the card on the face of the ENR for the entire enrolment process, until the LED turns green.



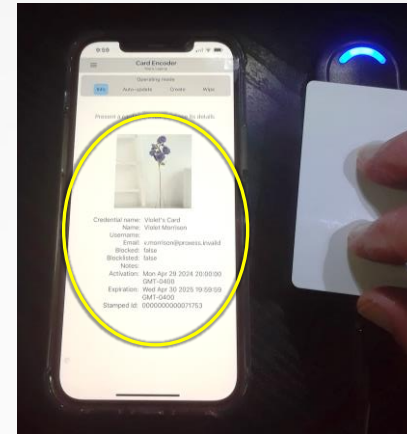
The blue LED shows the card is being encoded to that User's Credential. Please Remove the card from the ENR.



## Verifying & Wiping Physical Credentials using the Proxess Sync app



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



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



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

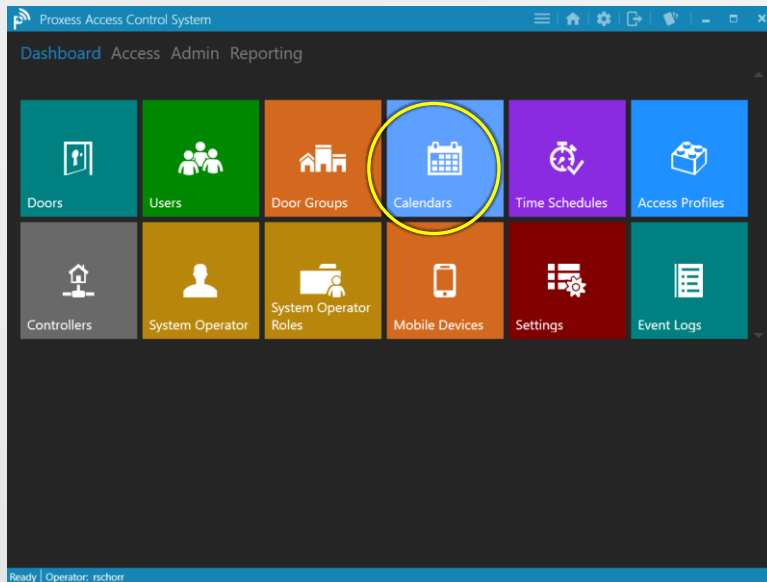


The screen will state that the credential has been successfully wiped. Please Remove the credential from the reader.

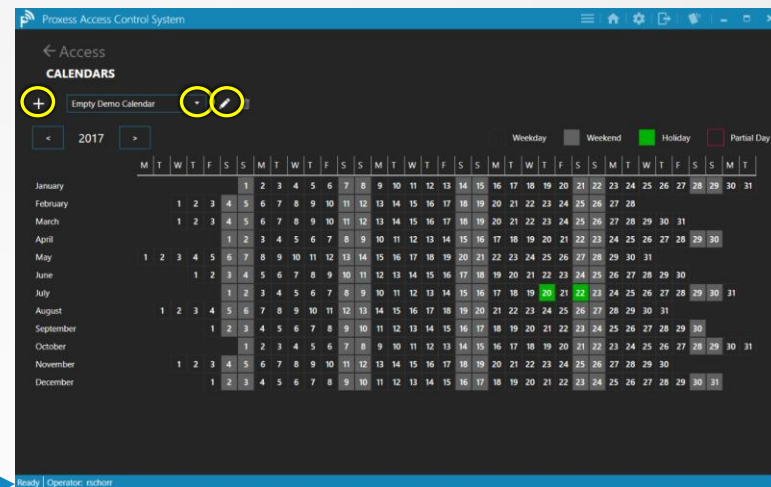


# CALENDARS

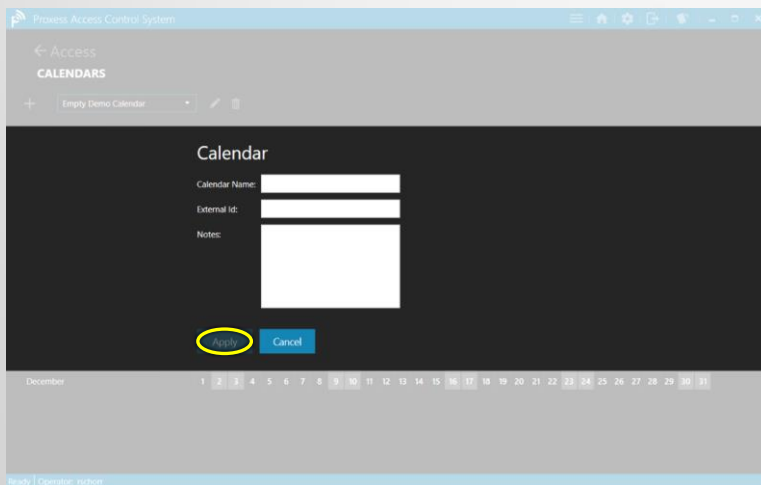




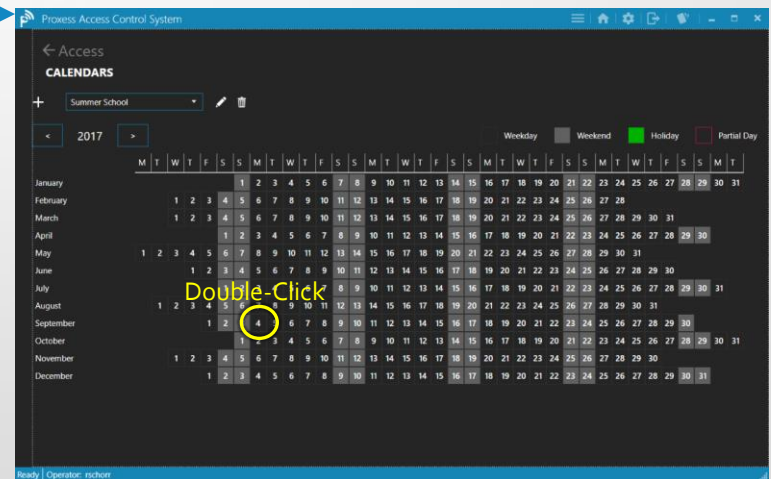
Click the icon for the "Calendars" module. Calendars are where you add traditional Holidays and other specialty days. Specialty days can be planned in advance (e.g. weddings at a church, sports games at a school), or added on-demand (e.g. weather related event).



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



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



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





Proxess Access Control System

Access

CALENDARS

+ Summer School

Calendar Event

Event Name: Labor Day

Notes:

Start: Day: September 4, 2017, Time: 07:00 (07:00 AM)

End: Day: September 4, 2017, Time: 19:00 (07:00 PM)

Apply Cancel Delete

Ready | Operator: rchort

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.

Proxess Access Control System

Access

CALENDARS

+ Summer School

< 2017 >

Weekday Weekend Holiday Partial Day

January

February

March

April

May

June

July

August

September

October

November

December

Ready | Operator: rchort

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.

Proxess Access Control System

Access

CALENDARS

+ Summer School

< 2017 >

Weekday Weekend Holiday Partial Day

January

February

March

April

May

June

July

August

September

October

November

December

Double-Click

Calendar Event Details

Name: Labor Day

Start Date Time: Monday, September 4, 2017 7:00 AM

End Date Time: Monday, September 4, 2017 7:00 PM

Notes:

Ready | Operator: rchort

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

Proxess Access Control System

Access

CALENDARS

+ Summer School

< 2017 >

Weekday Weekend Holiday Partial Day

January

February

March

April

May

June

July

August

September

October

November

December

Calendar Event

Event Name: Labor Day

Notes:

Start: Day: September 4, 2017, Time: 07:00 (07:00 AM)

End: Day: September 4, 2017, Time: 19:00 (07:00 PM)

Apply Cancel Delete

Ready | Operator: rchort

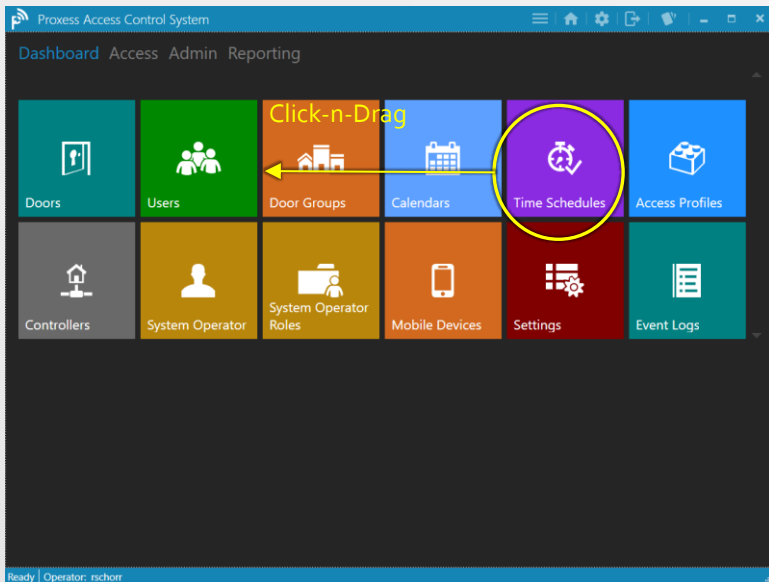
You can now make adjustments to the Holiday, or click "Cancel" to return to the previous screen and then click the Home icon on the top taskbar to return to the Home Screen \ Dashboard.



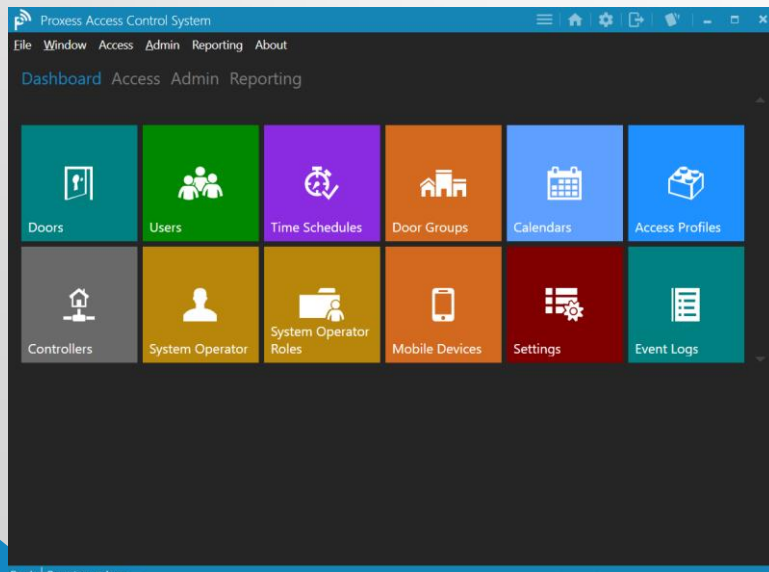
# USER INTERFACE FLEXIBILITY



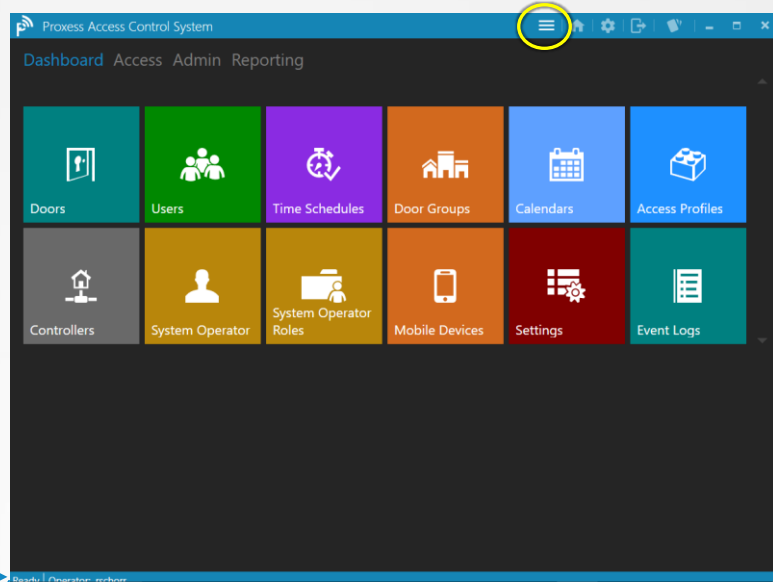
## User Interface Flexibility - 1



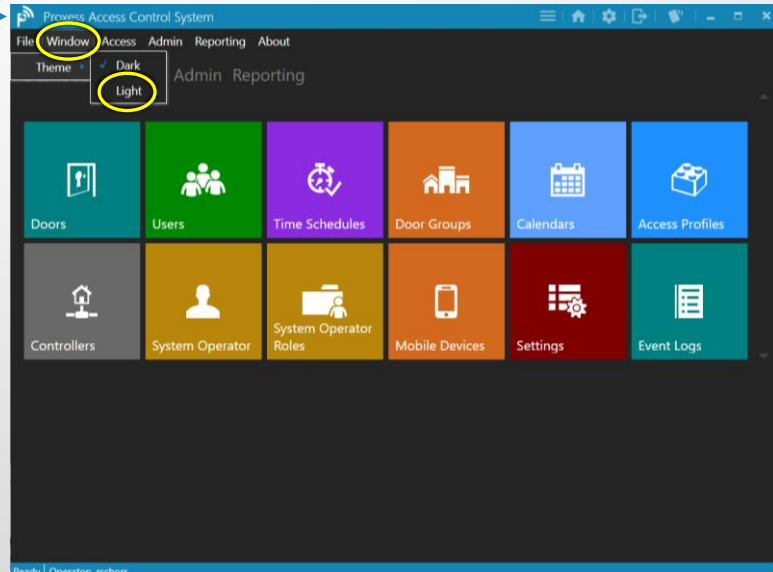
The Dashboard \ Home Screen \ User Interface may be customized in several ways. First, you may click-and-drag any module to another part of the screen, thus rearranging the module icons.



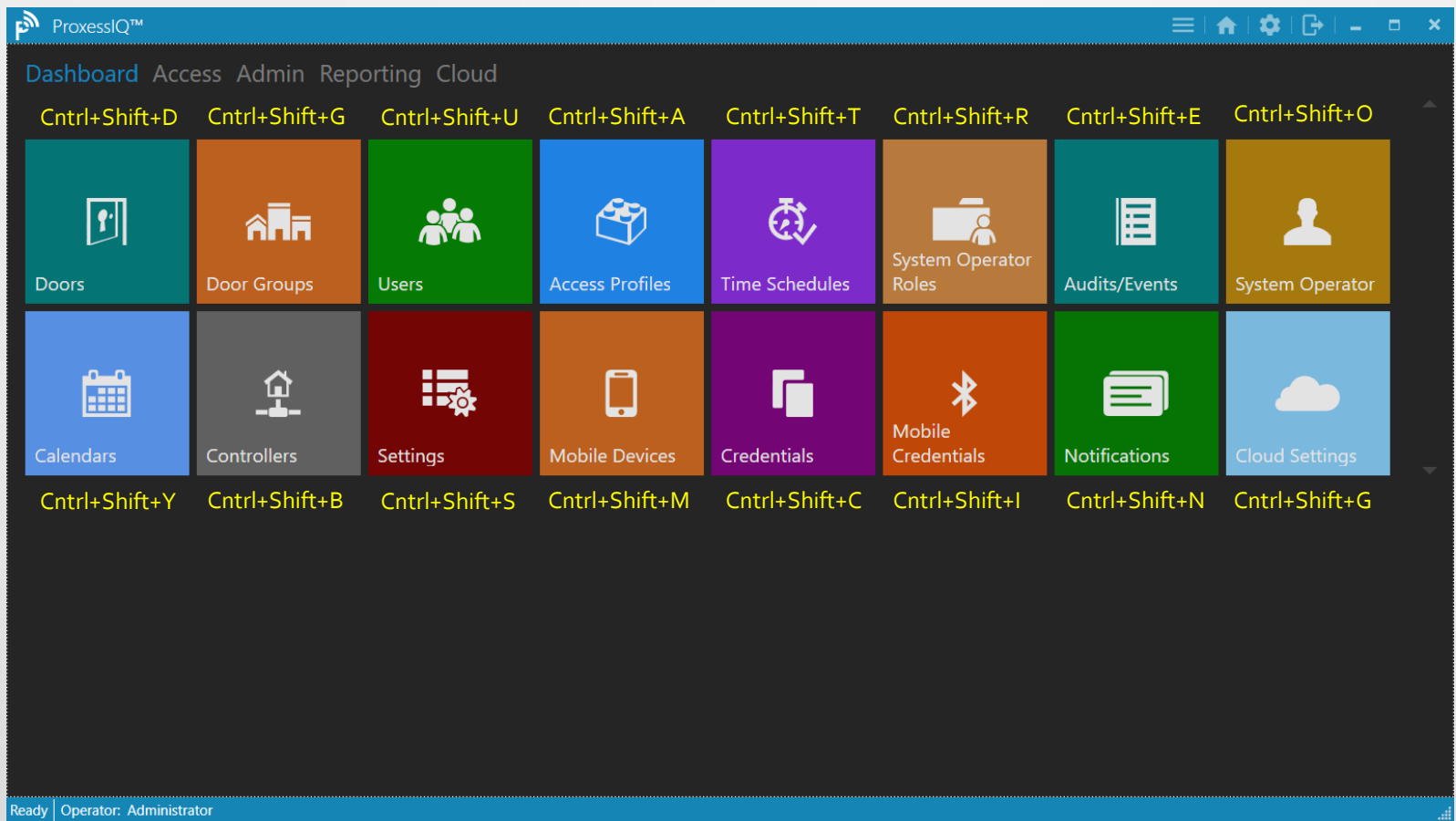
...The file shortcut menu will appear and remain at the top of the page throughout the system, until you again click on the same icon on the top taskbar.



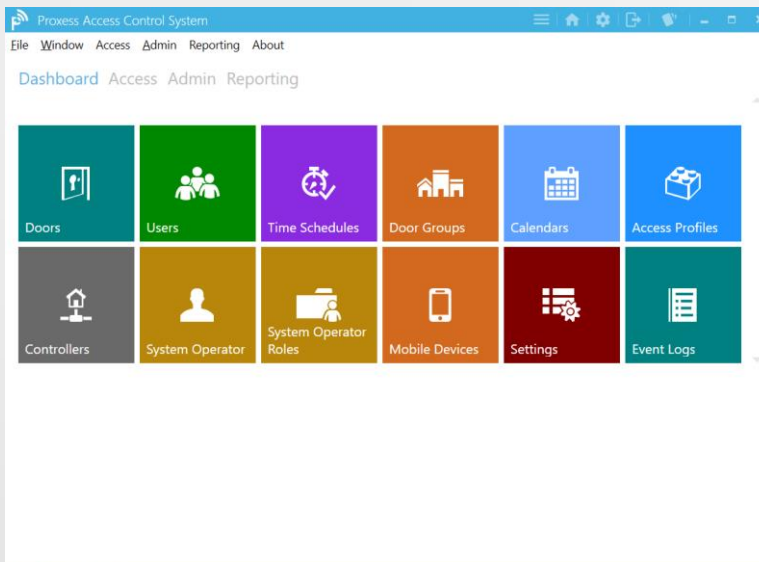
By clicking on the icon highlighted on the top taskbar...



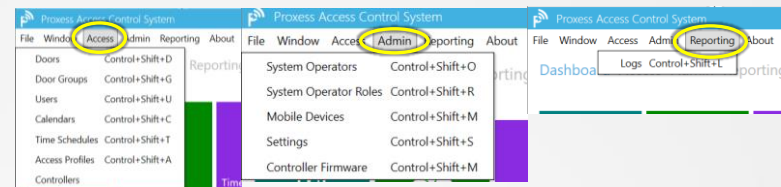
Click on the "Window" button, highlight "Theme" and then click on "Light".



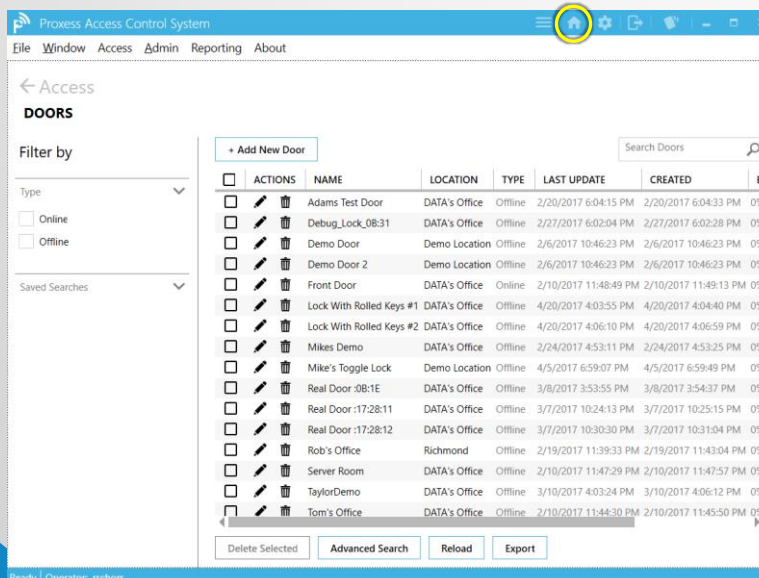
From anywhere within the ProxessIQ program, the above **Hot-Key** shortcuts may be used to jump into that menu.



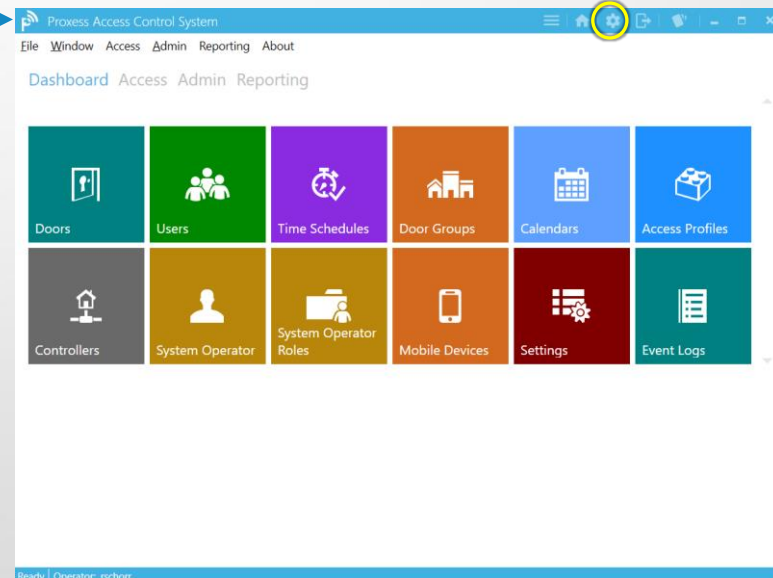
The screen background is now changed to white and will remain so throughout the system until the background is changed back to "Dark".



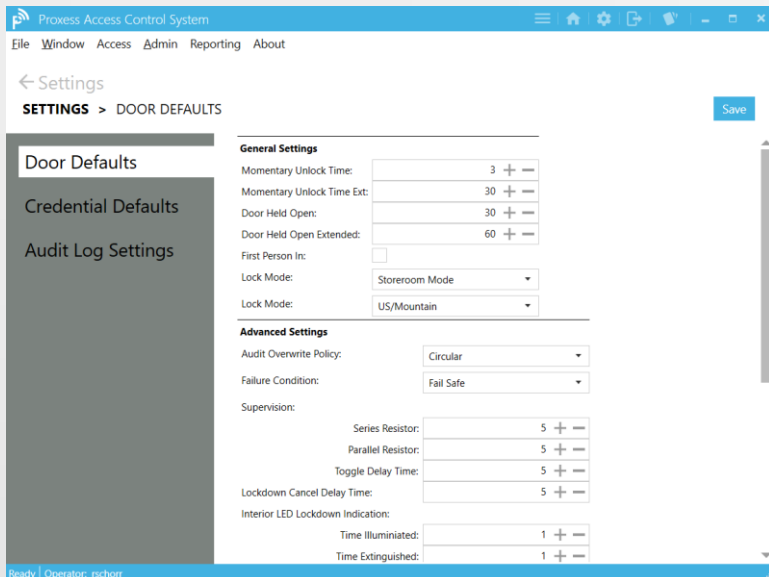
As an alternate to using the module icons on the Dashboard, the file shortcut menu can be used to quickly navigate from and to any other module with a single click.



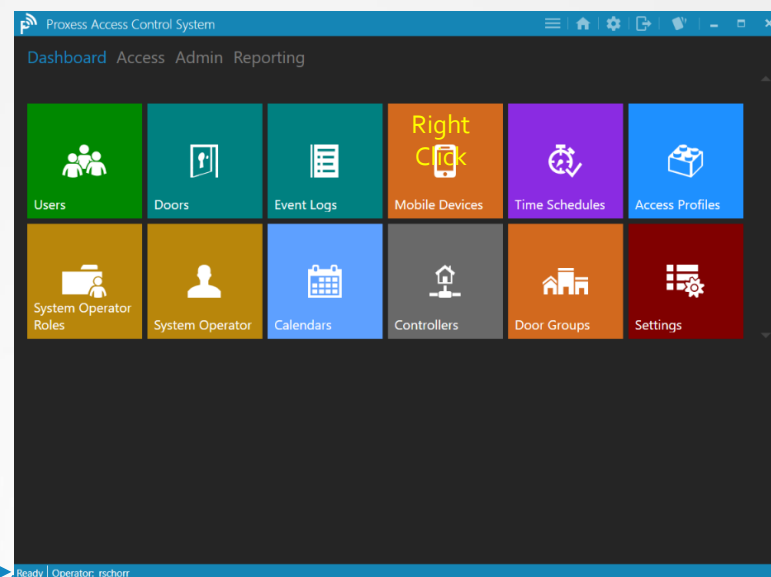
The Home icon is used from any screen in the system to bring you back to the Dashboard \ Home Screen.



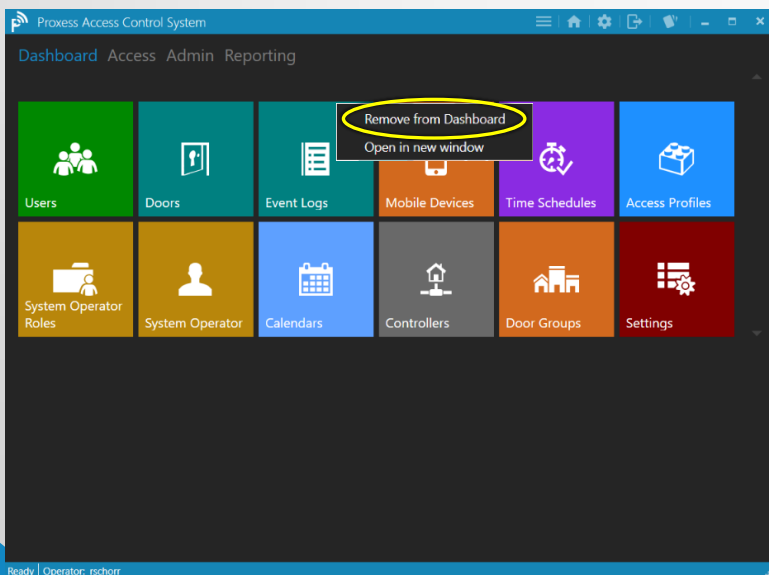
From any screen in the system, you can shortcut to the "Settings" module with a click on the icon shown in the top taskbar.



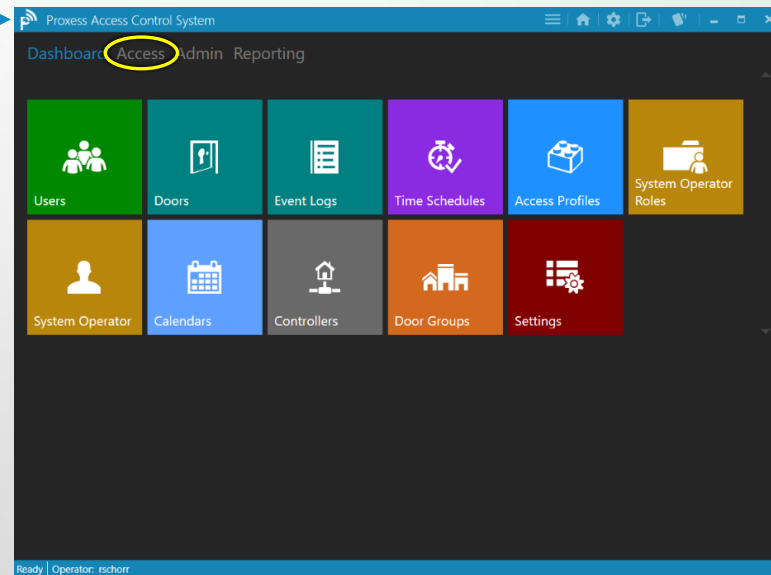
The "Settings" module opens. Now return to the Home Screen \ Dashboard.



Right-click on a module icon.



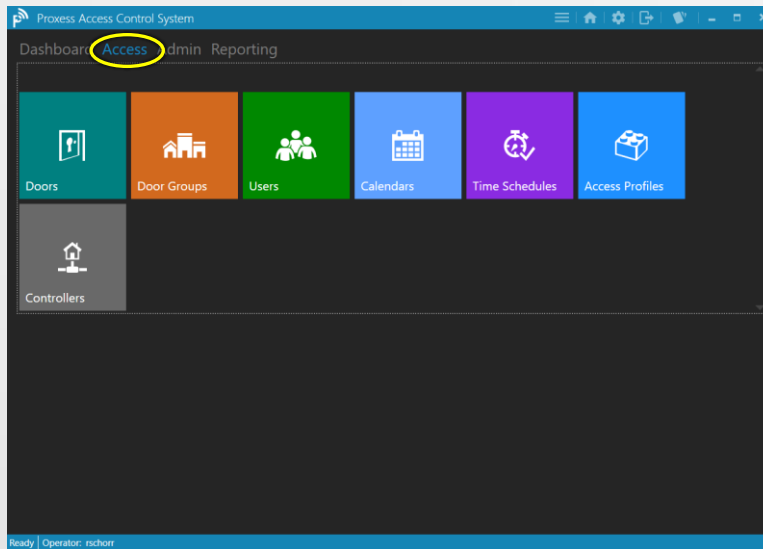
You may "Remove" the icon from the Dashboard or open it in a new window (Is this working right?).



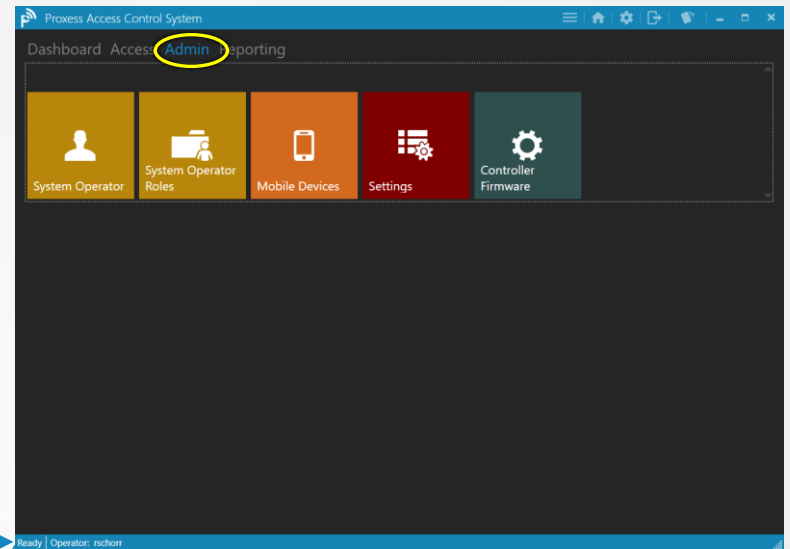
Click on "Access" in the top menu.



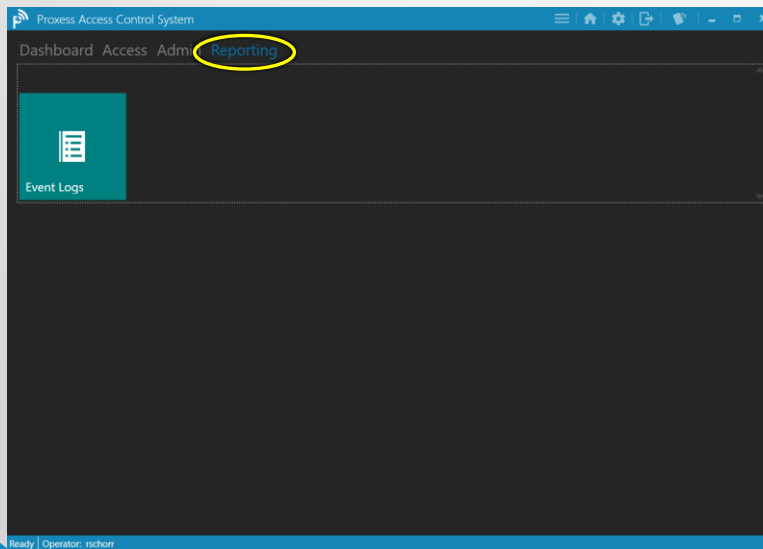
## User Interface Flexibility - 5



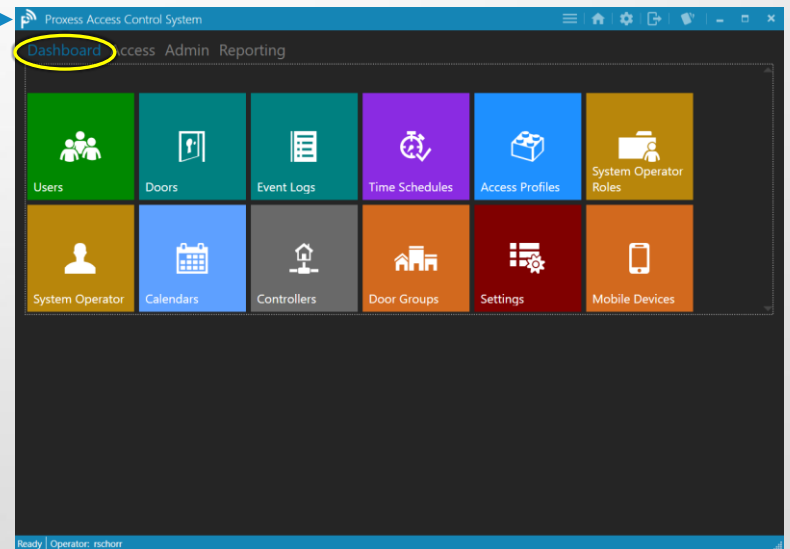
These are the module icons that appear when you click on "Access".



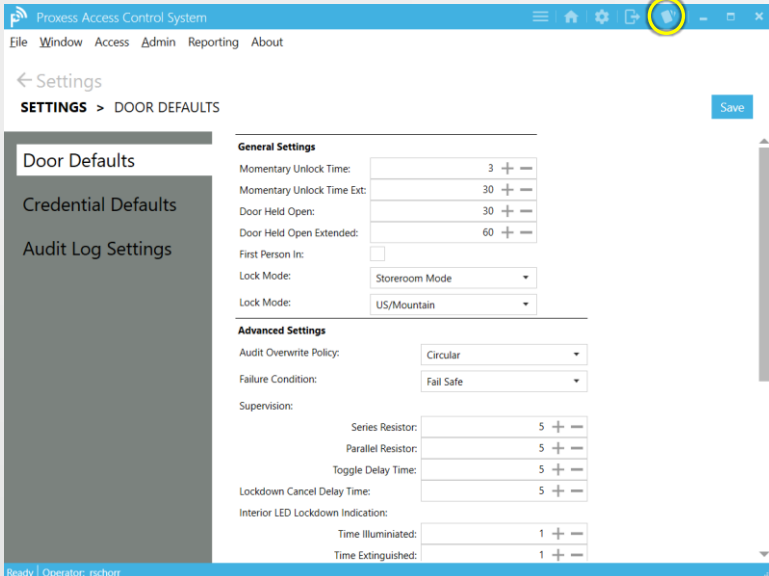
These are the module icons that appear when you click on "Admin".



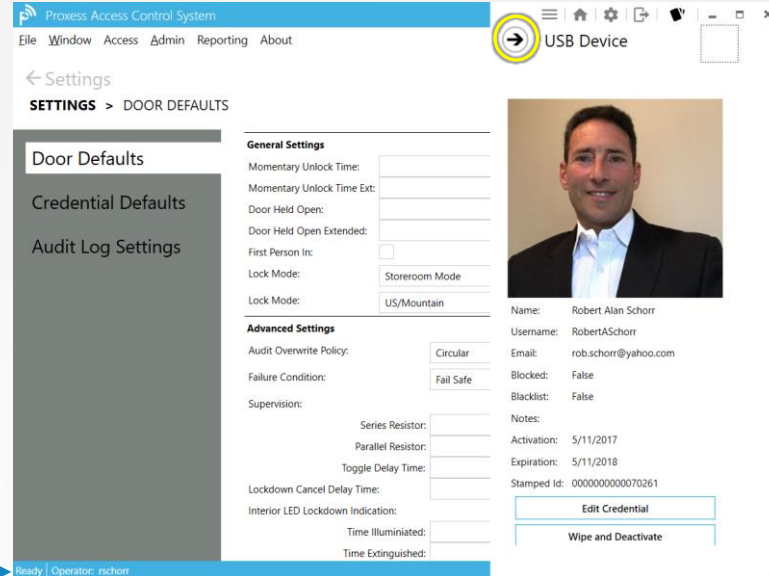
These are the module icons that appear when you click on "Reporting".



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.

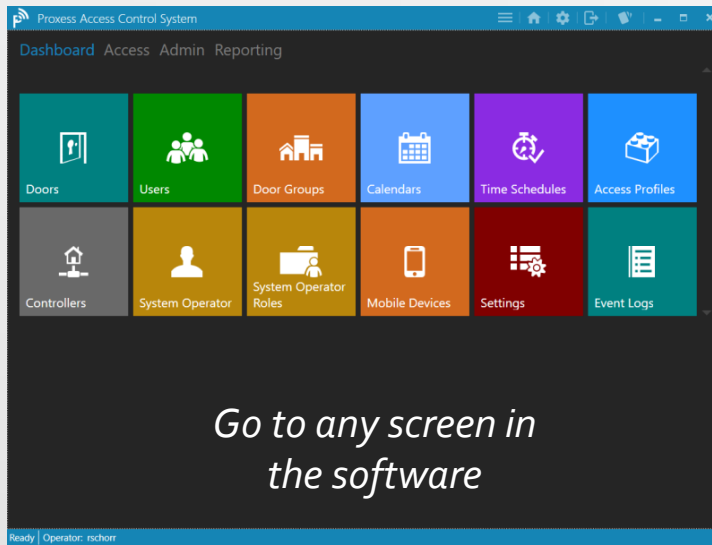




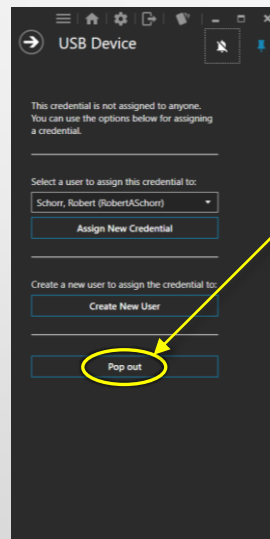
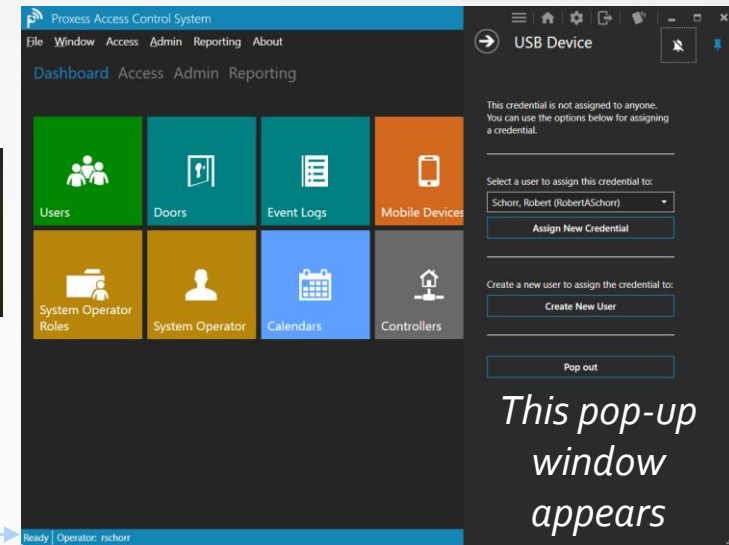
# USING the ENROLLMENT READER within ProxessIQ™



# The Pop-up Window



Place a new card on the enrollment reader



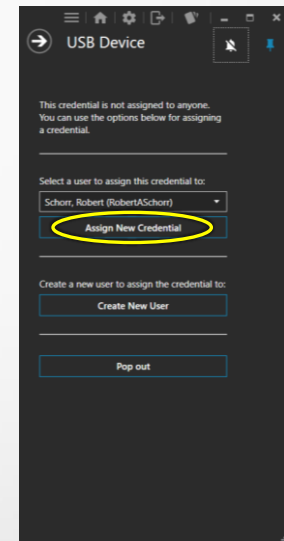
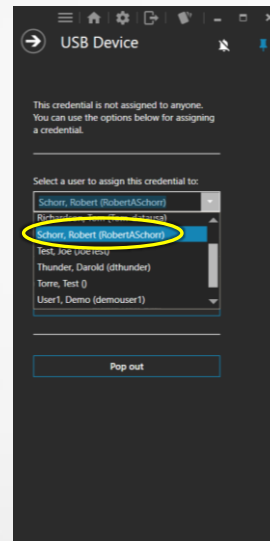
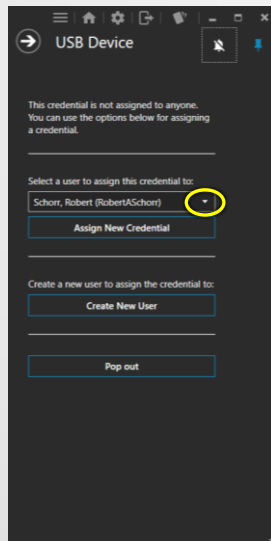
The pop-up window presents several options for the operator.

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



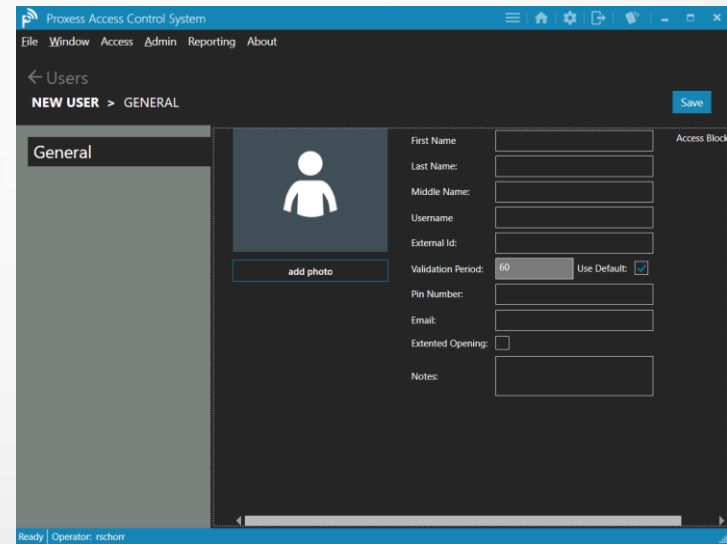
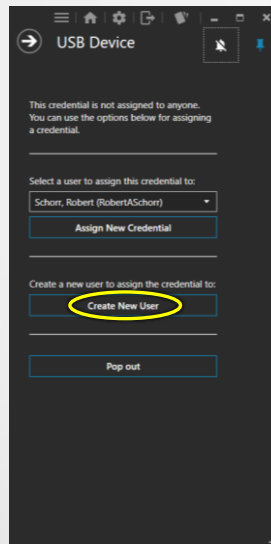
The Operator may assign the credential that is currently on the enrollment reader to an Existing User.

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

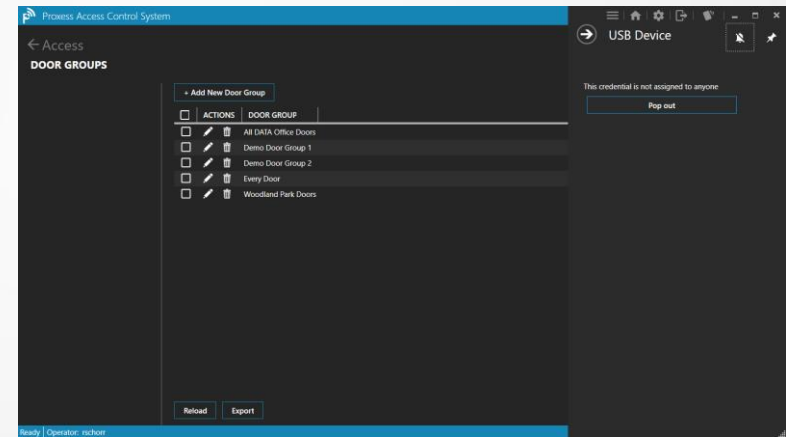
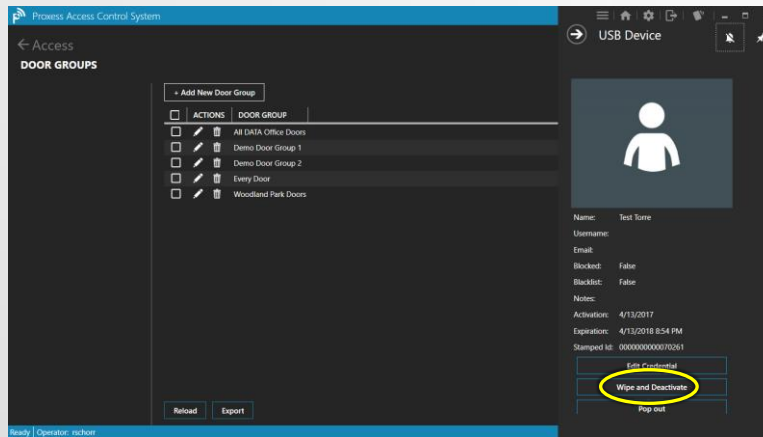


With the card on the enrollment reader, the Operator may create a New User record for it.

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.

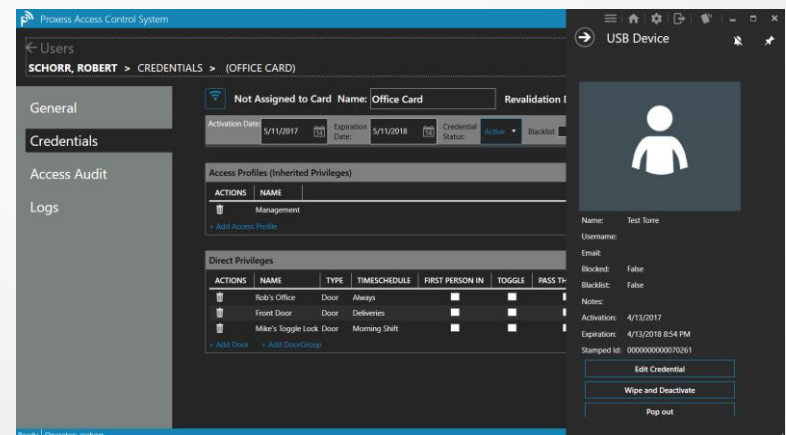
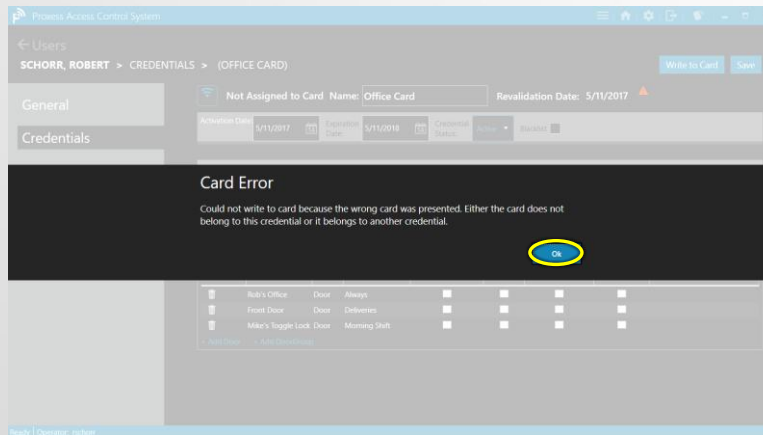
The operator may click "Edit Credential" to be brought to the edit screen for that user and may click "Pop out" to move the window freely on their desktop.

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".

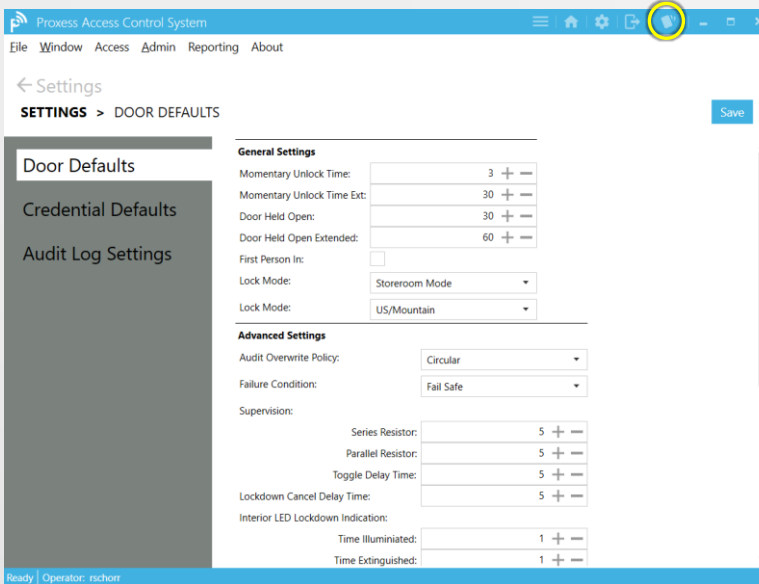
The screen on the right will appear and the card is now free to be assigned to anyone.



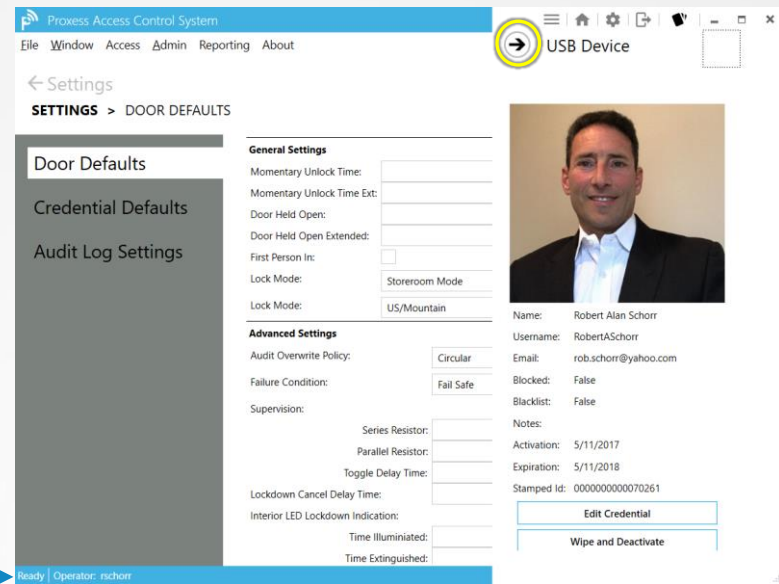
## Attempting to Enroll an Existing Card



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.



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

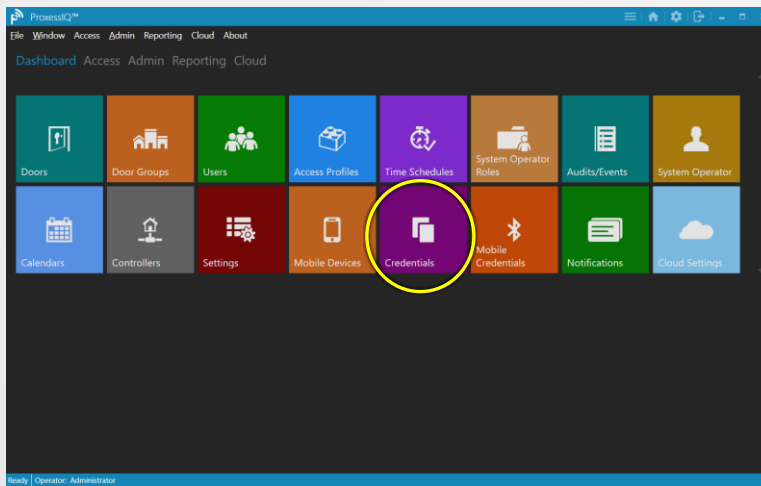


The most recent credential that was placed on the enrollment reader will pop-up.

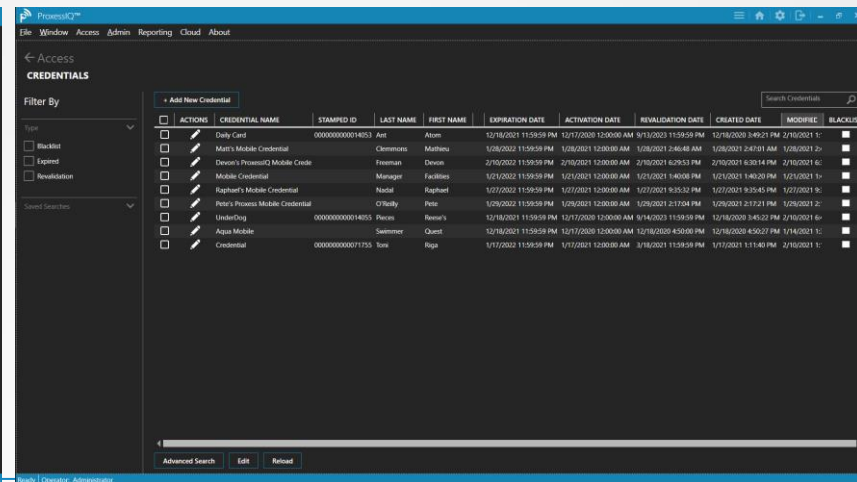


# CREDENTIALS





From the Home screen \ Dashboard, click "Credentials".  
A User must first be created/entered from the Users menu.  
Once a User has been created, Credentials may be created in either the Users or Credentials menus. The Credentials menu is a simpler management tool, as all of the credentials are in a single list, whereas in the Users menu, you must first navigate into a specific User's record and then exit from that User before managing another User's credential.



Your existing Credentials (even multiple credentials associated with a single User) will be listed.  
Credentials may be edited, as previously instructed in the Users section.  
Credential records may be sorted by clicking on the headers at the top of the list (Credential Name, Stamped ID, etc...).  
Credentials may be Blacklisted from this menu.  
New Credentials may be added, as previously instructed in the Users section.  
Advanced Searches, with multiple levels using Boolean Algebra, can be created, executed and saved for future use.  
Click ...

# Advanced Searches of Credentials

ProxessQ™ | ALL ORGANIZATIONS

File Window Access Admin Reporting Cloud About

## Access

### CREDENTIALS

Filter By

Type

- ☐ Blocklist
- ☐ Expired
- ☐ Revaledation
- ☐ Mobile Credential

Saved Searches

+ Add New Credential

Search Credentials

<input type="checkbox"/>	ACTIONS	CREDENTIAL NAME	STAMPED ID	LAST NAME	FIRST NAME	EMAIL	USERNAME	EXPERATION DATE	ACTIVATION DATE	REVALIDATION DATE	CREATED DATE	MODIFIED DATE	MOBILE CREDENTIAL	BLOCKLIST	ORGANIZATIONS
<input type="checkbox"/>		A		124	Borden			8/8/2024 11:59:59 PM	8/8/2023 12:00:00 AM	5/4/2026 11:59:59 PM	8/8/2023 3:32:03 PM	1/30/2024 6:37:58 PM	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		Burk Mobile		124	Borden			1/30/2025 11:59:59 PM	1/30/2024 12:00:00 AM	1/30/2024 7:32:53 PM	1/30/2024 7:33:40 PM	1/30/2024 7:33:40 PM	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		B		124	Borden			2/7/2025 11:59:59 PM	2/7/2024 12:00:00 AM	2/7/2024 3:45:21 PM	2/7/2024 3:45:28 PM	2/7/2024 3:45:28 PM	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		Pass-Through		Admin	Super	fake@		12/13/2024 11:59:59 PM	12/13/2023 12:00:00 AM	12/13/2023 10:15:07 PM	12/13/2023 10:16:07 PM	12/19/2023 3:14:41 PM	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		Pass-Through Card		Admin	Super	fake@		12/13/2024 11:59:59 PM	12/13/2023 12:00:00 AM	12/13/2023 10:17:41 PM	12/13/2023 10:17:53 PM	12/13/2023 10:17:53 PM	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		Maya Mobile		Ba	Maya	baldeuiczm@westerntc.edu		11/9/2024 11:59:59 PM	11/9/2023 12:00:00 AM	11/9/2023 6:02:59 PM	11/9/2023 6:03:08 PM	12/1/2023 10:38:10 PM	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		Maya Lockdown		Ba	Maya	baldeuiczm@westerntc.edu		11/9/2024 11:59:59 PM	11/9/2023 12:00:00 AM	11/9/2023 6:03:39 PM	11/9/2023 6:03:46 PM	12/1/2023 10:38:12 PM	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		CB Card	000000000014237	Bartee	Carl	cbartee@fbcglenarden.org		4/17/2025 11:59:59 PM	4/17/2024 12:00:00 AM	1/12/2027 11:59:59 PM	4/17/2024 2:30:50 PM	4/25/2024 1:41:17 PM	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input checked="" type="checkbox"/>		CB Mobile		Bartee	Carl	cbartee@fbcglenarden.org		4/17/2025 11:59:59 PM	4/17/2024 12:00:00 AM	4/17/2024 2:57:17 PM	4/17/2024 2:57:41 PM	4/17/2024 2:57:41 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		CB LK		Bartee	Carl	cbartee@fbcglenarden.org		4/17/2025 11:59:59 PM	4/17/2024 12:00:00 AM	4/17/2024 2:59:05 PM	4/17/2024 2:59:17 PM	4/17/2024 2:59:17 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		Scott's Mobile		Cobb	Scott	scobb@eyeonis.com		9/15/2024 11:59:59 PM	9/15/2023 12:00:00 AM	9/15/2023 3:14:50 PM	9/15/2023 3:15:00 PM	10/24/2023 4:02:13 PM	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		Credential		CoreMK	SwitchTech			10/24/2024 11:59:59 PM	10/24/2023 12:00:00 AM	10/24/2023 2:45:04 PM	10/24/2023 2:45:07 PM	10/24/2023 4:02:19 PM	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		Credential		Darion	Nelly	dstone@kb.com	Science Department	2/5/2025 11:59:59 PM	2/5/2024 12:00:00 AM	2/5/2024 7:20:19 PM	2/5/2024 7:20:40 PM	2/5/2024 7:43:03 PM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Global
<input type="checkbox"/>		Darion Mobile		Darion	Nelly	dstone@kb.com	Science Department	2/5/2025 11:59:59 PM	2/5/2024 12:00:00 AM	2/5/2024 7:30:32 PM	2/5/2024 7:30:45 PM	2/7/2024 4:30:56 PM	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		Dexter's Mobile		Earney	Dexter	earneyde@gysu.edu		12/8/2024 11:59:59 PM	12/8/2023 12:00:00 AM	12/8/2023 3:30:24 PM	12/8/2023 3:30:38 PM	12/19/2023 3:14:44 PM	<input type="checkbox"/>	<input type="checkbox"/>	Global
<input type="checkbox"/>		Maddir G Mobile		Gia	MAd	mgiardina@arcsugalloway.org		2/7/2025 11:59:59 PM	2/7/2024 12:00:00 AM	2/7/2024 2:09:44 PM	2/7/2024 2:10:02 PM	3/8/2024 9:09:37 PM	<input type="checkbox"/>	<input type="checkbox"/>	Global

Advanced Search Edit Reload

Ready Operator: Administrator

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

Credentials - 2

ProxessQ™ | ALL ORGANIZATIONS

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## Access

### USERS

Filter by

Saved Searches

Advanced Search

Last Name Contains

AND (Exclusive)  
OR (Inclusive)

Search

Save

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

Delete Selected Reload Export Import



# Advanced Searches of Users

Within each User record

ProccessIQ™ ALL ORGANIZATIONS

File Window Access Admin Reporting Cloud About

← Access

USERS

Filter by

Advanced Search

Last Name Contains [ ]

User Name [ ] Science

+ Add Filter

AND (Exclusive) OR (Inclusive)

Search

Save

ACTIONS	LAST NAME	FIRST NAME	MIDDLE NAME	EMAIL	USERNAME	ORGANIZATION
<input type="checkbox"/>	T24	Borden				Global
<input type="checkbox"/>	Admin	Super		fakel@		Global
<input type="checkbox"/>	Ila	Maya		baldewicz@westernm.edu		Global
<input type="checkbox"/>	Bartee	Carl		cbartee@fbglennarden.org		Global
<input type="checkbox"/>	Cobb	Scott		scobb@eyenias.com		Global
<input type="checkbox"/>	CassMK	Switchtech				Global
<input type="checkbox"/>	Darion	Nelly		dstone@kb.com	Science Department	Global
<input type="checkbox"/>	Earnay	Dexter		earnayd@psu.edu		Global

Delete Selected Reload Export Import

Ready | Operator: Administrator

ProccessIQ™ ALL ORGANIZATIONS

File Window Access Admin Reporting Cloud About

← Access

USERS

Filter by

Advanced Search

Last Name Contains [ ]

User Name [ ] Science

+ Add Filter

AND (Exclusive) OR (Inclusive)

Search

Save

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

Delete Selected Reload Export Import

Ready | Operator: Administrator

ProccessIQ™ ALL ORGANIZATIONS

File Window Access Admin Reporting Cloud About

← Access

USERS

Filter by

Advanced Search

Last Name Contains [ ]

User Name [ ] Science

+ Add Filter

AND (Exclusive) OR (Inclusive)

Search

Save

Save Advanced Search

Search Name

Department Search

OK Cancel

Delete Selected Reload Export Import

Ready | Operator: Administrator

ProccessIQ™ ALL ORGANIZATIONS

File Window Access Admin Reporting Cloud About

← Access

USERS

Filter by

Advanced Search

Last Name Contains [ ]

User Name [ ] Science

+ Add Filter

AND (Exclusive) OR (Inclusive)

Search

Save

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

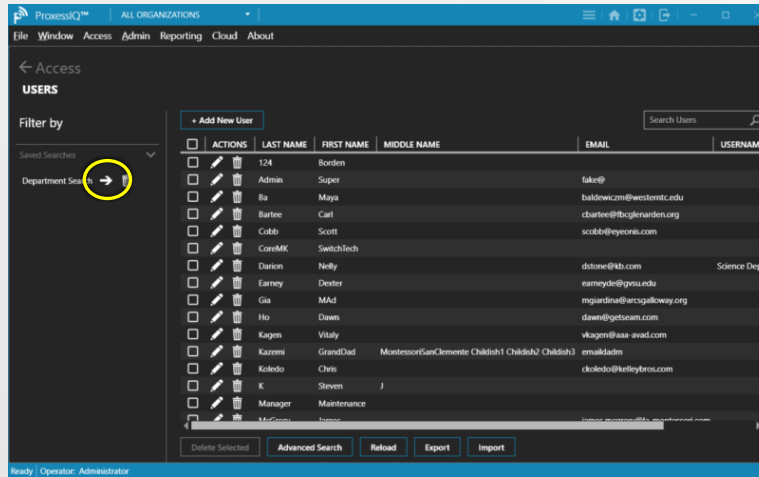
Delete Selected Reload Export Import

Ready | Operator: Administrator

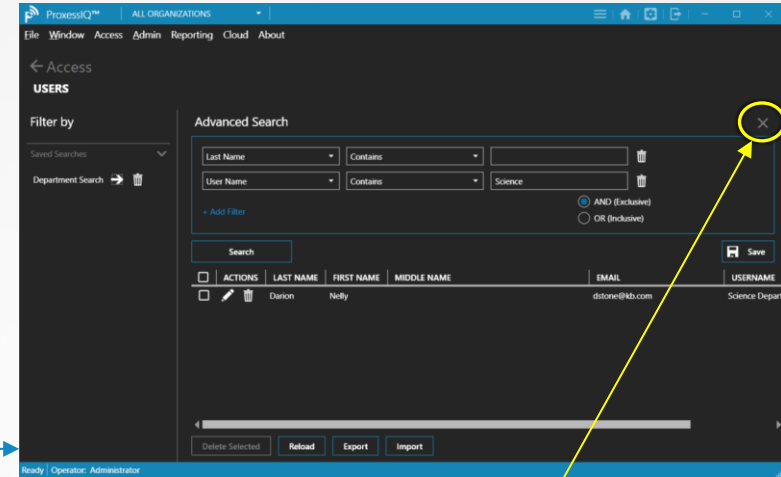
Name this search for your future use and click "OK".  
Your new custom search will now appear in this list, for later execution by this and other operators.  
When you have completed your Search, you must click "X" to bring you back to the full list of Users, or the User menu will continue to only show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



## Advanced Searches of Users



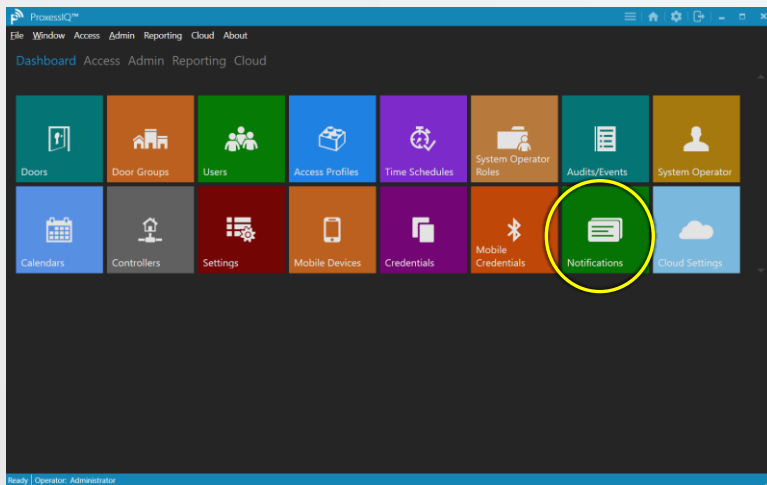
You are now returned to the full list of Users.  
You may execute on that saved search again any  
time, by clicking on the arrow next to its name.



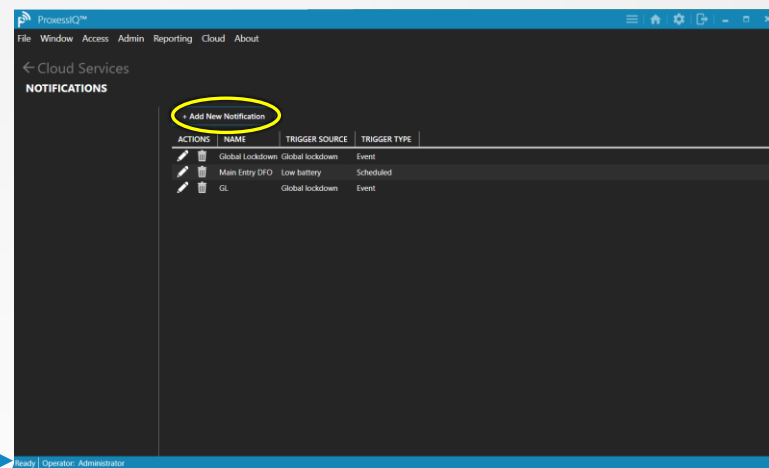
You may Export the search results to a .csv for  
further manipulation and click the "X" and return to  
your normal system work.



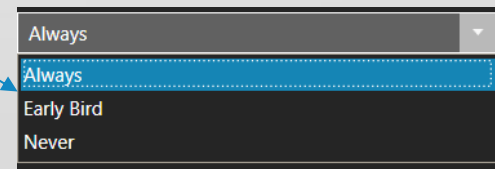
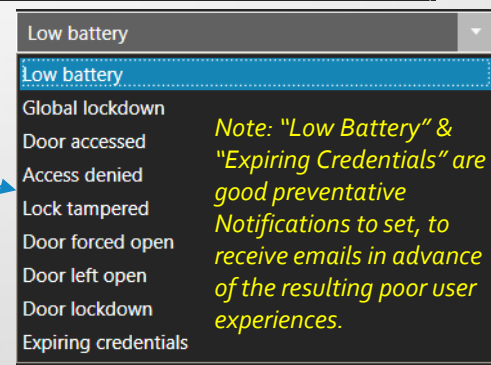
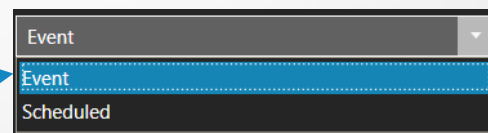
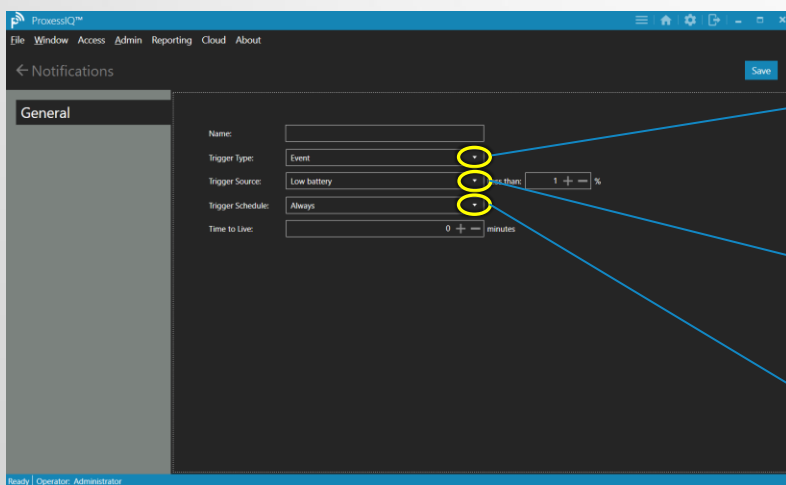
# NOTIFICATIONS



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



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



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



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

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

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

Click on "Save".



ProvenIQ™

File Window Access Admin Reporting Cloud About

← Notifications Save

General

Name: Preventative Battery Maintenance

Trigger Type: Scheduled

Trigger Source: Low battery Less than: 30 + - %

**Notification Saved**

The notification changes have been saved

Ok

Ready | Operator: Administrator

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

ProvenIQ™

File Window Access Admin Reporting Cloud About

← Notifications Save

General

Name: Preventative Battery Maintenance

Trigger Type: Scheduled

Trigger Source: Low battery Less than: 30 + - %

Delivery Schedule: Every 4 WEEK at 08:00:00 starting 2/9/2021 (Tuesday)

Time to Live: 0 + - minutes

Recipients: + Add New Recipient

ACTIONS	NAME	DELIVERY METHOD
---------	------	-----------------

Ready | Operator: Administrator

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".

ProvenIQ™

File Window Access Admin Reporting Cloud About

← Notifications Save

General

Name: Preventative Battery Maintenance

Trigger Type: Scheduled

**Select Recipient for Notification**

Select User: Facilities Manager ()

Select Delivery Method: User Email

Ok Cancel

Ready | Operator: Administrator

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".

ProvenIQ™

File Window Access Admin Reporting Cloud About

← Notifications Save

General

Name: Preventative Battery Maintenance

Trigger Type: Scheduled

Trigger Source: Low battery Less than: 30 + - %

Delivery Schedule: Every 4 WEEK at 08:00:00 starting 2/9/2021 (Tuesday)

Time to Live: 0 + - minutes

Recipients: + Add New Recipient

ACTIONS	NAME	DELIVERY METHOD
	Facilities Manager ()	User Email

Ready | Operator: Administrator

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".



ProxessIQ™

ALL ORGANIZATIONS

Notifications

Save

General

Name:

A Lockdown Event

Trigger Type:

Event

Trigger Source:

Door lockdown

Trigger Schedule:

Always | Global\*

Time to Live:

0 + - minutes

Filtered By

ACTIONS	NAME	TYPE
	Import CX 1	Door
<div>+ Add Door + Add Door Group</div>		

Recipients

ACTIONS	NAME	DELIVERY METHOD
	MC #4	User Email
<div>+ Add New Recipient</div>		

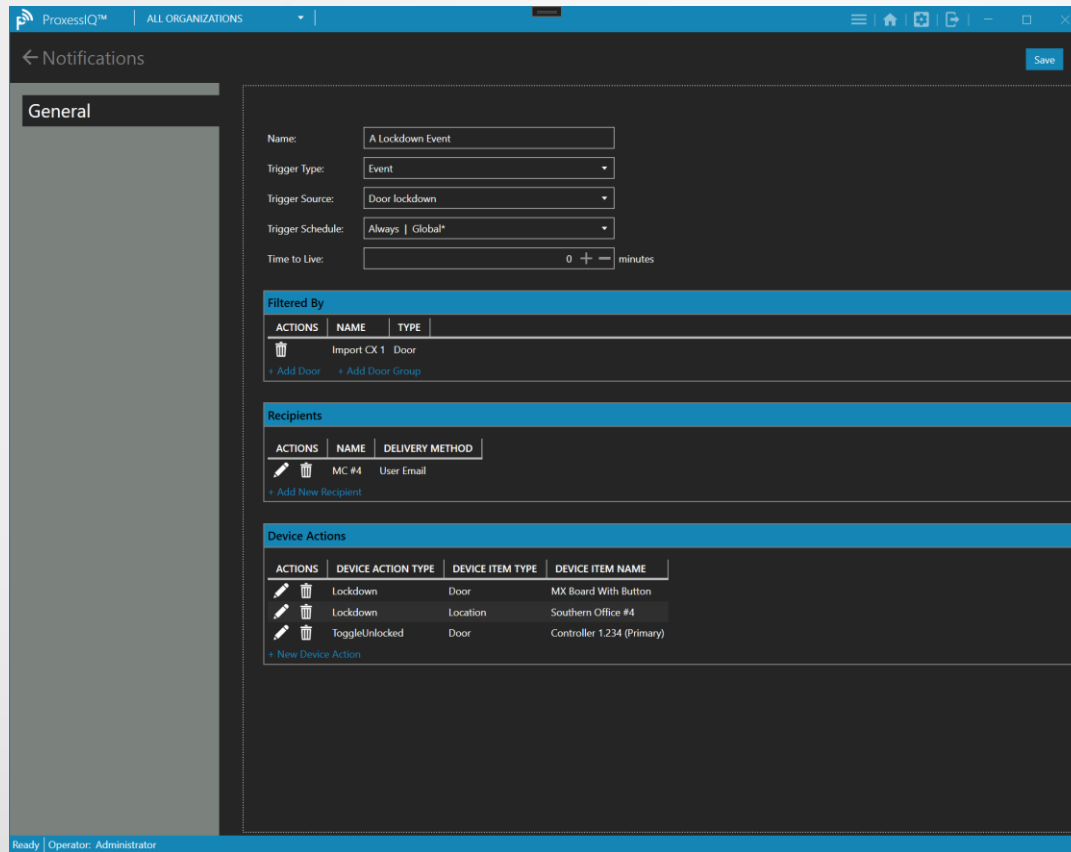
Device Actions

ACTIONS	DEVICE ACTION TYPE	DEVICE ITEM TYPE	DEVICE ITEM NAME
	Lockdown	Door	MX Board With Button
	Lockdown	Location	Southern Office #4
	ToggleUnlocked	Door	Controller 1.234 (Primary)
<div>+ New Device Action</div>			

Ready

Operator: Administrator

# TRIGGERS & ACTIONS



ProxessIQ™ | ALL ORGANIZATIONS

Notifications

Save

General

Name: A Lockdown Event

Trigger Type: Event

Trigger Source: Door lockdown

Trigger Schedule: Always | Global\*

Time to Live: 0 + - minutes

Filtered By

ACTIONS	NAME	TYPE
	Import CX 1	Door
<a href="#">+ Add Door</a> <a href="#">+ Add Door Group</a>		

Recipients

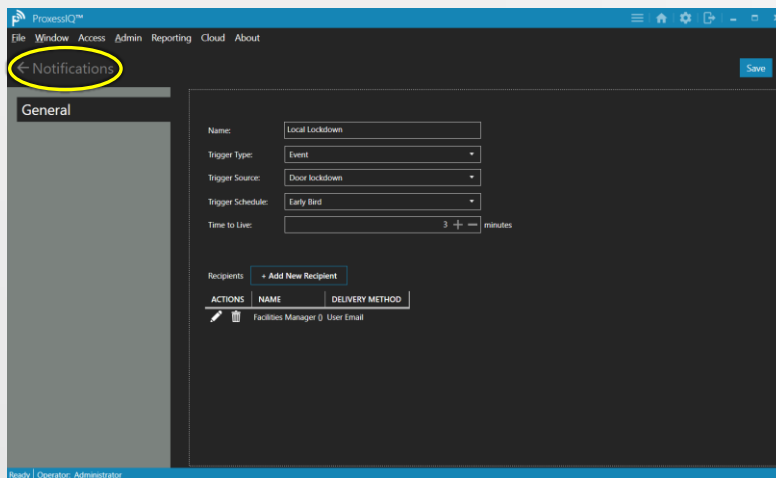
ACTIONS	NAME	DELIVERY METHOD
	MC #4	User Email
<a href="#">+ Add New Recipient</a>		

Device Actions

ACTIONS	DEVICE ACTION TYPE	DEVICE ITEM TYPE	DEVICE ITEM NAME
	Lockdown	Door	MX Board With Button
	Lockdown	Location	Southern Office #4
	ToggleUnlocked	Door	Controller 1.234 (Primary)
<a href="#">+ New Device Action</a>			

Ready | Operator: Administrator

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



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



# MOBILE CREDENTIALS (Settings)

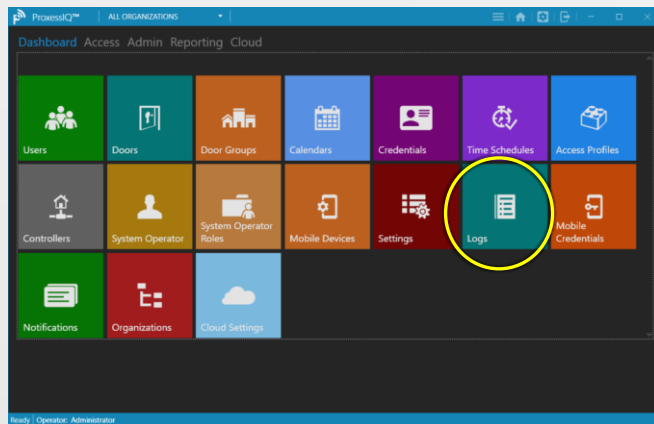


# CLOUD (Settings)



# LOGS

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



Click on the “Logs” menu.

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

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

Reporting

AUDITS/EVENTS

Filter by

Saved Searches

Adhoc →

General →

Daily Use →

ACTIONS	EVENT CODE	SOURCE ITEM NAME	SOURCE USER/OPERATOR	EVENT DATE TIME(LOCAL)	CREATED (LOCAL)	EVENT DATE TIME(UTC)	CREATED (UTC)	ORGANIZATIONS	VIDEO
	CREDENTIAL_UPDATE	TS Card		4/17/2024 12:37:56 PM	4/17/2024 12:37:56 PM	4/17/2024 4:37:56 PM	4/17/2024 4:37:56 PM	Global	
	CREDENTIAL_UPDATE	TS Card		4/17/2024 12:37:32 PM	4/17/2024 12:37:32 PM	4/17/2024 4:37:32 PM	4/17/2024 4:37:32 PM	Global	
	LOCK_PARAMETERS_PROGRAMMABLE_VIA_BLE	Assumption Classroom 1		4/17/2024 12:36:35 PM	4/17/2024 12:36:46 PM	4/17/2024 4:36:35 PM	4/17/2024 4:36:46 PM	Global	
	OPERATORMPD_CREATE	Tariq phone	Administrator	4/17/2024 12:35:28 PM	4/17/2024 12:35:28 PM	4/17/2024 4:35:28 PM	4/17/2024 4:35:28 PM	Global	
	LOCK_PARAMETERS_PROGRAMMABLE_VIA_BLE	Assumption Classroom 1		4/17/2024 11:52:43 AM	4/17/2024 11:52:54 AM	4/17/2024 3:52:43 PM	4/17/2024 3:52:54 PM	Global	
	MECHANICAL_KEY_ACCESS	Assumption Classroom 1		4/17/2024 11:52:35 AM	4/17/2024 11:52:54 AM	4/17/2024 3:52:35 PM	4/17/2024 3:52:54 PM	Global	
	MECHANICAL_KEY_ACCESS	Assumption Classroom 1		4/17/2024 11:52:32 AM	4/17/2024 11:52:54 AM	4/17/2024 3:52:32 PM	4/17/2024 3:52:54 PM	Global	
	LOCK_PARAMETERS_PROGRAMMABLE_VIA_BLE	Assumption Classroom 1		4/17/2024 11:52:19 AM	4/17/2024 11:52:34 AM	4/17/2024 3:52:19 PM	4/17/2024 3:52:34 PM	Global	
	USER_UPDATE	Bartee, Carl	Administrator	4/17/2024 11:41:01 AM	4/17/2024 11:41:01 AM	4/17/2024 3:41:01 PM	4/17/2024 3:41:01 PM	Global	
	ACCESS	Assumption Classroom 1	Scott, Tariq	4/17/2024 11:40:12 AM	4/17/2024 11:52:34 AM	4/17/2024 3:40:12 PM	4/17/2024 3:52:34 PM	Global	
	CREDENTIAL_UPDATE	TS Card	Administrator	4/17/2024 11:09:43 AM	4/17/2024 11:09:43 AM	4/17/2024 3:09:43 PM	4/17/2024 3:09:43 PM	Global	
	CREDENTIAL_UPDATE	TS Card	Administrator	4/17/2024 11:09:42 AM	4/17/2024 11:09:42 AM	4/17/2024 3:09:42 PM	4/17/2024 3:09:42 PM	Global	
	CREDENTIAL_UPDATE	Credential	Administrator	4/17/2024 11:09:07 AM	4/17/2024 11:09:07 AM	4/17/2024 3:09:07 PM	4/17/2024 3:09:07 PM	Global	
	ACCESS	Assumption Classroom 1	Scott, Tariq	4/17/2024 11:08:42 AM	4/17/2024 11:52:34 AM	4/17/2024 3:08:42 PM	4/17/2024 3:52:34 PM	Global	
	CREDENTIAL_UPDATE	TS Card	Administrator	4/17/2024 11:08:28 AM	4/17/2024 11:08:28 AM	4/17/2024 3:08:28 PM	4/17/2024 3:08:28 PM	Global	
	CREDENTIAL_CREATE	TS Card	Administrator	4/17/2024 11:08:04 AM	4/17/2024 11:08:04 AM	4/17/2024 3:08:04 PM	4/17/2024 3:08:04 PM	Global	

Refresh Latest Logs Load More... Advanced Search Export Viewing 754 event logs

Ready | Operator: Administrator

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





### SEARCH SOURCES

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

### EVENT CODE TYPE

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

### EVENT SOURCE TYPE

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

**EVENT CODE NAME**

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

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

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



# SETTINGS



Proxess Access Control System

File Window Access Admin Reporting About

Settings

SETTINGS > DOOR DEFAULTS

Save

Door Defaults

Credential Defaults

Audit Log Settings

General Settings

Momentary Unlock Time: 3

Momentary Unlock Time Ext: 30

Door Held Open: 30

Door Held Open Extended: 60

First Person In: ☐

Lock Mode: Storeroom Mode

Lock Mode: US/Mountain

Advanced Settings

Audit Overwrite Policy: Circular

Failure Condition: Fail Safe

Supervision:

Series Resistor: 5

Parallel Resistor: 5

Toggle Delay Time: 5

Lockdown Cancel Delay Time: 5

Interior LED Lockdown Indication:

Time Illuminated: 1

Time Extinguished: 1

Exterior LED:

LED Illumination Time for Invalid Access: 1

LED Illumination Time for Valid Access: 1

Egress Cancels Lockdown: ☐

Pass-Through Cancels Lockdown: ☒

Beep with Programming: ☐

Beep when Access Granted: ☒

Beep when Access Denied: ☒

Event Recording to Card:

Record Valid Access Attempts: ☐

Record Invalid Access Attempts: ☒

Record Contact Points: ☒

Record Lock Events: ☒

Record Communications: ☒

Ready | Operator: rschorr

Proxess Access Control System

File Window Access Admin Reporting About

Settings

SETTINGS > AUDIT LOG SETTINGS

Save

Door Defaults

Credential Defaults

Audit Log Settings

Door/Lock Audit Events

Valid Access Events

Access: ☒

Entry: ☒

Exit: ☒

Access Under Duress: ☒

Entry Under Duress: ☒

Exit Under Duress: ☒

Access Under Lockdown: ☒

Entry Under Lockdown: ☒

Exit Under Lockdown: ☒

Access Under Duress During Lockdown: ☒

Entry 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: ☒

Invalid Access Events

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

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: ☒

Time Changed: ☒

Contact Point

Tamper Secure: ☒

Rex Active: ☒

Rex Secure: ☒

Rex Fault Short: ☒

Rex Fault Open: ☒

Dod Active: ☒

Dod Fault Short: ☒

Dod Fault Open: ☒

Tamper Active: ☒

Dod Secure: ☒

Communications

Communication Restored To Reader: ☒

Communication Lost To Proxess Host: ☒

Communication Restored To Proxess Host: ☒

Communication Lost To Reader: ☒

Ready | Operator: rschorr

Proxess Access Control System

File Window Access Admin Reporting About

Settings

SETTINGS > CREDENTIAL DEFAULTS

Save

Door Defaults

Credential Defaults

Audit Log Settings

General Settings

Validation Period (days): 60

Event Recording to Card:

Record Valid Access Attempts: ☐

Record Invalid Access Attempts: ☒

Record Contact Points: ☒

Record Lock Events: ☒

Record Communications: ☒

Ready | Operator: rschorr

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).



# LEDs for DEBUGGING LOCKS & CONTROLLERS



## Information & Debugging LED/Light Sequences

### Cylindrical / Mortise / Exit Trim

- Rainbow (all colors in sequence)-startup sequence when lock is powered on or restarts
- White- when interior button pushed, one flash white means lock is in construction mode (unprogrammed)
- Green- access granted
- Red-Access denied
- Blue-Data communication issue happening
- Triple red- battery low (or when toggled locked)
- Triple green- toggled unlocked
- Yellow- bad/defective/uninitialized credential
- Teal-Bluetooth timeout
- Purple- communication issue with lock reader board



## Information & Debugging LED/Light Sequences

### Mini-IQ

- Rainbow (all colors in sequence)-startup sequence when lock is powered on or restarts
- Green- access granted
- Red-Access denied
- Blue-Data communication happening
- Triple red- battery low (or when toggled locked)
- Triple green- toggled unlocked
- Yellow- bad/defective/uninitialized credential
- Purple/white (reader light will be half illuminated purple & half white)- error pushing firmware, reader will restart on its own within a few minutes (do not reset power)
- Yellow- bad/defective/uninitialized credential
- Pulsing red – reader cannot communicate with Mini-IQ board



## Information & Debugging LED/Light Sequences

### Reader (BoxIQ)

- Rainbow (all colors in sequence)-startup sequence when lock is powered on or restarts
- Green- access granted
- Red-Access denied
- Blue-Data communication happening
- Triple red- battery low (or when toggled locked)
- Triple green- toggled unlocked
- Yellow- bad/defective/uninitialized credential
- Purple/white (reader light will be half illuminated purple & half white)- error pushing firmware, reader will restart on its own within a few minutes (do not reset power)
- Yellow- bad/defective/uninitialized credential
- Pulsing red – reader cannot communicate with BoxIQ
- Stuck on solid blue – Can happen after firmware updates, reader is waiting for a command from a controller. Any action will set the reader lights to normal