

Advanced ACS Software User Guide

E-PLEX[®]

January 2006

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1

About the E-Plex Advanced ACS

The E-Plex 5200 and E-Plex 5700 door locks are designed to limit and control entry to an area or premises through the use of a numeric combination (PIN) entered via the keypad, for both the E-Plex 5200 and E-Plex 5700, and the presentation of a proximity token (Prox Card), for the E-Plex 5700. The locks are designed to work in conjunction with the E-Plex Advanced Access Control System software (E-Plex Advanced ACS software), with the intent to use a handheld Personal Digital Assistant (PDA) to transfer information between the PC and the lock.

Note: For the purposes of this manual, the “Handheld PDA” or “Palm PDA” will be referred to as the M-Unit (Maintenance Unit), as its primary function is to perform maintenance at the lock.

The items explained in this chapter include:

- System Components
- System Definitions
- The E-Plex Advanced ACS Package

System Components

The E-Plex Advanced ACS contains the following system components:

- E-Plex 5200 and/or E-Plex 5700 locks
- PC and the E-Plex Advanced ACS software
- Handheld M-Unit and the E-Plex Advanced ACS M-Unit software
- If E-Plex 5700 locks are used, Prox Cards and a Prox Card Reader/Enroller

Note: *The Prox Card Reader/Enroller is recommended, but not required.*

E-Plex 5200 and E-Plex 5700 Locks

The E-Plex 5200 and E-Plex 5700 door locks are stand-alone, battery operated electronic locks that function to grant access to authorized users. An E-Plex 5200 lock grants access when users enter a valid PIN at the lock keypad (pushbuttons). An E-Plex 5700 lock will grant access if a user enters a valid PIN, presents a valid Prox Card to the Prox Reader on the lock front housing, or enters a valid PIN followed by an associated valid Prox Card. Either model can store up to 3,000 unique users and store the last 30,000 transactions (audits) in the lock memory. There is only one Master User per lock.

Lock Modes

You can access the E-Plex 5200 or the E-Plex 5700 lock by three modes:

- **Factory Mode** – The lock is shipped from the factory in Default Factory Mode and is operational after being installed. The lock can only be opened with the Default Factory Master User PIN of “12345678.”
- **Access Mode** – This mode refers to a lock that is operational for user access. When the lock is in Access Mode, the method of lock access is PIN only for the E-Plex 5200. The method of lock access for the E-Plex 5700 is PIN only, Prox Card only, or PIN and Prox Card.
- **Pushbutton Programming Mode** – In this mode, the Master User, the Manager(s), or the M-Unit Users can enter one or more command sequence to program, configure, or audit the lock.

For more information about using the lock in these modes, refer to **States of the Lock** in Chapter 4, **Operating the E-Plex Lock at its Keypad**.

Lock Access Methods

You can open a lock using one of three different access methods. You can set up the lock to require different access methods for different users or for the same user operating the lock on different access schedules.

PIN Only (E-Plex 5200 or E-Plex 5700)

Entering a valid PIN into the lock keypad will grant access to the lock.

Prox Card Only (E-Plex 5700 only)

Only the presentation of a valid Prox Card is required to access the lock.

PIN and Prox Card (E-Plex 5700 only)

The entry of a valid PIN followed by the presentation of a valid associated Prox Card is required to access the lock. Access via PIN and Prox Card is identified as “dual credential” access.

Prox Cards and Prox Card Reader/Enroller (E-Plex 5700 Only)

The E-Plex 5700 lock supports HID Prox Card access as a method of lock entry for users. The Master Operator can enroll Prox Cards for users at the PC via the pcProx™ Card Reader/Enroller, or through the manual Batch Enroll method.

Note 1: *The E-Plex 5700 lock supports only HID-supported Prox Cards with Wiegand bit formats from the standard 26 bits up to 84 bits.*

Note 2: *The Prox Card Reader/Enroller is recommended but not required if only the standard 26-bit Wiegand format Prox Cards are used in the system.*

PC and E-Plex Advanced ACS Software

The E-Plex Advanced ACS software is installed on the PC and allows you to manage your door locks and the associated user data from the PC. It also offers audit and reporting capabilities.

M-Unit and E-Plex Advanced ACS M-Unit Software

The E-Plex Advanced ACS M-Unit software is installed on the M-Unit and allows for programming (uploading) and auditing (downloading) of data to and from the lock. It also allows for the download of User Table and lock Audit data from the lock to use for reporting purposes at the PC.

System Definitions

This section contains system definitions for the following items.

- PC System Operator Classifications
- PINs
- Door Groups
- Access Schedules
- Holidays/Vacations
- Lock User Personnel Classifications

PC System Operator Classifications

Three types of operators can use and operate the E-Plex Advanced ACS software.

- **Level 1 Operator** – The E-Plex 5200/E-Plex 5700 has one Level 1 Operator who is the Master Operator with the highest system authorization. Unless additional operators are added, this is the only person who can manage the system software. The Level 1 Operator has access to all functions of the E-Plex Advanced ACS software.

The Level 1 Operator can add Level 2 or Level 3 Operators to the E-Plex Advanced ACS software. When an operator is added to the software, the Level 1 Operator must establish a Logon Password. The Level 1 Operator can add a maximum of six operators to the software: three Level 2 Operators and three Level 3 Operators.

- **Level 2 Operator** – Level 2 Operators can perform all functions of Level 1 Operators, with the exception of adding, modifying, or deleting any other operators.
- **Level 3 Operator** – Level 3 Operators can perform all functions of Level 1 Operators, with the exception of:
 - Adding, modifying, or deleting any other operators.
 - Having access to the **System Setup** menu in the software.

PINs

The E-Plex Advanced ACS features a variable length PIN (code or combination). A PIN can be four to eight digits in length. Regardless of the length, a PIN will always be unique to a given user. The default PIN length for all user types is four digits, except for the Master User PIN, which is always eight digits in length. The default length of the User PIN can be changed during the system setup at the PC. PIN lengths cannot be mixed for different types of users, and they must all be the same—anywhere from four to eight digits in length.

Door Groups

You can define an unlimited amount of door groups in both the system database and the lock.

A door group represents a group of physical doors that contain the E-Plex 5200 and/or the E-Plex 5700 locks.

Access Schedules

You can define an unlimited amount of Access Schedules in the system database. However, you can define only up to 16 access schedules in a lock. When assigning access schedules to a user, you may only use the access schedules that have been assigned to the lock. There is a default access schedule, “Always” (24 hours per day, seven days per week), that is built into the system software and cannot be changed or deleted.

An access schedule is a defined time period during the span of a week during which users are granted access to a door. Operators using the E-Plex Advanced ACS software at the PC define the access schedules by selecting the days of the week that the schedule is active, and by specifying the schedule’s start time and end time for the days specified. You can define a descriptive schedule name for each access schedule. Once defined, you can assign access schedules to a door from the **Access Assignment** menu of the software. A maximum of 16 access schedules can be assigned to a single door.

Because you may specify whether the door access method is PIN (E-Plex 5200/E-Plex 5700), Prox Card (E-Plex 5700 only), or both (E-Plex 5700 only), the different access schedules in the system cannot overlap.

If you have a need for periods of time where access for certain groups of users overlaps partially, you will need to break those time periods into separate access schedules. Also, an access schedule cannot bridge a time period over two days. If you have an access schedule that needs to start before midnight and end after midnight, you must set this up as two separate access schedules.

Example

During the week, I have three shifts at my company:

- First Shift – 7:00 a.m. to 3:00 p.m.
- Second Shift – 2:00 p.m. to 11:00 p.m.
- Third Shift – 10:00 p.m. to 8:00 a.m.

These three shifts will need to be broken into seven access schedules so they do not overlap:

- 7:00 a.m. to 2:00 p.m. – First shift
- 2:00 p.m. to 3:00 p.m. – First and second shift overlap
- 3:00 p.m. to 10:00 p.m. – Second shift
- 10:00 p.m. to 11:00 p.m. – Second and third shift overlap
- 11:00 p.m. to 12:00 p.m. – First part of third shift (first day)
- 12:00 a.m. to 7:00 a.m. – Second part of third shift (next day)
- 7:00 a.m. to 8:00 a.m. – Third and first shift overlap

Additionally, by default, all user types (except the Master) are not granted any access to the lock. So, access schedule(s) must be assigned to these types of users also.

Choose from the access schedules that have been previously defined for the door, which means that the maximum number of access schedules that can be assigned to a user for a particular door is the number of access schedules defined for the door.

Holidays/Vacations

You can define an unlimited amount of Holidays/Vacations in the system database. However, you can define only up to 32 holidays/vacations in a lock.

A holiday/vacation template is a defined time period during which users will NOT be granted access to a door. By default, there will be no access allowed to a door/lock during a defined holiday/vacation period, except for the Master Operator, the Service Users, and any “privileged” users who are set up to override the holidays/vacations.

Lock User Personnel Classifications

Up to six different types of users can perform various operations at the lock.

- **Master User** – The Master User is the top-level manager who performs the initial lock setup activities and can program all lock functions. There is only one Master User per lock. The Master User is the only user who has “Always” access to any lock, and has all the access privileges all the time. The Master User’s PIN is always eight digits in length. In E-Plex 5700 locks, the Master User can also assign a Prox Card for dual credential programming of the lock at the lock keypad.

► *About the E-Plex Advanced ACS*

- **Manager User** – A Manager User is a second-tier administrator who can program all lock functions specified in the **Summary of Pushbutton Programming Commands** table in Chapter 4, **Operating the E-Plex Lock**. Each lock can have up to 3,000 Manager Users.
- **Access User** – An Access User has only the ability to open locks. Each lock may have up to 3,000 Access Users, which are permanent and never expire.
- **Guest** – A Guest only has the ability to open locks for a specified amount of time. Each lock may have up to 3,000 Guest Users, which are temporary and last between 1 day and 365 days (1 year).
- **M-Unit User** – An M-Unit User does not have access to open any locks. The M-Unit User can only perform maintenance on locks, as well as any lock programming and auditing. Each lock may have up to 3,000 M-Unit Users.
- **Service User** – A Service User has authorization any time of day to a lock for a specified period of time, from 1 hour to 24 hours from the first time he or she enters the PIN, or for one-time entry. The Service User has PIN only access to the E-Plex 5200 or E-Plex 5700 locks.

Note: *Optionally, all of the user types, including Manager Users, can have one or all of the following three privileges:*

- *Override holidays/vacations*
 - *Override deadbolt privacy*
 - *First entry passage authorization*
-

The E-Plex Advanced ACS Package

The E-Plex Advanced ACS package includes:

- E-Plex Advanced ACS software installation CD
- *E-Plex Advanced Access Control System User's Guide* (this Guide, which is also included on the installation CD in electronic format)

2

Getting Started

The contents of this chapter are intended to assist you with setting up your E-Plex Advanced ACS (E-Plex 5200/E-Plex 5700).

The items explained in this chapter include:

- System Requirements
- Basic System Setup
- Main Menu and Toolbar

System Requirements

The following hardware and software minimum requirements are recommended to use the E-Plex Advanced ACS.

- IBM compatible PC (Pentium II or greater) capable of running Windows with an available USB or serial port for a PDA cradle or a HotSync cable.
- Screen area resolution capability of 1024 x 768 pixels.
- CD-RW drive for installing the software and for backing up the database.
- Hard disk drive with at least 20 MB of disk free space.
- Minimum system memory of 128 MB, or as recommended by the operating system.
- Windows 2000 Professional (Service Pack 4 or greater), Windows XP Home (Service Pack 2 or greater), or Windows XP Professional (Service Pack 1 or greater).
- Palm PDA running Palm OS 4.0 or higher. See the latest list of compatible PDAs on the E-Plex 5200/E-Plex 5700 Web site: www.e-plexlock.com.
- A Palm cradle or a HotSync cable is required to connect the Palm to the PC.

Note: For E-Plex 5700 lock systems only: You can order the *pcProx™ Card Reader/Enroller* with your E-Plex Advanced ACS. This device makes it quick and convenient to enroll/assign Prox Cards to E-Plex 5700 lock users. It can also be used to read and verify a user's "lost and found" card. However, it is not required if all of your Prox Cards are standard 26-bit Wiegand format, in which case you can manually input card IDs through Batch enrolling. A USB port is required at the PC to use the Prox Reader/Enroller.

Basic System Setup

Complete the following steps in this order prior to setting up the system for use:

- Install the Palm Desktop OS on the PC, and test for a successful HotSync operation on the Palm PDA (M-Unit).
- Install and register the E-Plex Advanced ACS software on the PC, ensuring first that you have Administrative rights to the PC. You must register the software for successful installation.
- Install the E-Plex Palm Interface application on the M-Unit.
- For E-Plex 5700 lock systems only: Connect the Prox Card Reader/Enroller and enable the device (as connected) in the **System Setup | System Settings** menu of the E-Plex Advanced ACS software.

Quick Start Guide

Complete this Quick Start Guide to quickly set up an E-Plex 5200/E-Plex 5700 lock.

1. Ensure that you have already installed your Palm PDA Desktop OS version 4.0 or higher on your PC and that your Palm PDA communicates (HotSyncs) to your PC without any problem. Your Palm PDA must also be set with the correct date and time.

2. Install the E-Plex Advanced ACS software and complete the software registration process, as requested to activate the software. Refer to **Software Registration and Installation** in this chapter for more information.
3. Install the E-Plex Palm Interface (M-Unit/Palm) application software and HotSync the application to your Palm PDA. Refer to **Installing the E-Plex Palm Interface Application on the M-Unit (Palm PDA)** in this chapter for more information.
4. Click the **E-Plex Advanced ACS** icon on your PC desktop to run the software.
5. Change the initial **Operator Name** and **Password** from "kaba" and "kaba" to something else; remember your new Operator Name and Password for future login sessions.
6. Change the default 8-digit **Master PIN** to any other 8-digit Master PIN.
7. On the **System Setup** screen, change any default parameters, like the global user PIN length, date/time format, etc., if desired.
8. Your unique 16-digit Customer Key is displayed on the **Help | About** screen menu. Write this number down, as you will need to enter this same value in your Palm PDA later.
9. Ensure that your M-Unit (Palm PDA) and the Prox Card Reader/Enroller (if using E-Plex 5700 PIN and proximity card locks) devices are connected to your PC.
10. Create your door groups.
11. Create your access schedules.
12. Create your holidays/vacations, if desired.
13. Create your user groups.
14. Create your users – assigning each user a PIN, Prox Card (for E-Plex 5700), etc.
15. Create your doors – assigning each door with a lock model, lock function, etc.
16. Select a previously created door and assign access schedules, access type (i.e. access by PIN only, card only, or both), holidays/vacations, and users for this door.
17. For the same selected door, assign access schedules to each user. You may also assign privileges to each user, if desired.
18. Repeat Steps 16 and 17 above for other doors created in the system.
19. Select the **Doors to program** (upload) for your E-Plex 5200 and/or E-Plex 5700 lock configuration files and HotSync these upload data files to your M-Unit.
20. On the M-Unit screen, tap the **E-Plex ACS** icon to launch the program. Enter the same 16-digit Customer Key from your E-Plex ACS PC software into the E-Plex application's **Enter Customer Key** screen (one time entry only).

Important: *Ensure that the actual lock on the door to be programmed is properly installed and initialized as per the Installation Instructions that came with the lock.*

21. Take the M-Unit to each of the desired doors/locks, select the upload file for the door, and program the lock. Repeat this step to program all the locks in your facility.
22. Similarly, go to the desired doors and audit the required locks in your facility.
23. Bring the M-Unit back to your E-Plex ACS software PC station, HotSync the audit information back to the PC, and view and/or print the lock audits you just downloaded.

Setting Up and Installing the Palm OS on the PDA (M-Unit)

Prior to installing the E-Plex Advanced ACS software, you should review the "Getting Started" information in the Basic Handbook for the Palm PDA, become acquainted with your basic Palm PDA operation, and install your Palm Desktop software.

► Getting Started

At this time, you should also physically install the Palm Cradle (or HotSync Cable) for the Palm by attaching it to your PC's USB port or the serial port, depending on your Palm PDA's interface connector.

Software Registration and Installation

Kaba Access Control's E-Plex Advanced ACS software requires you to register your individually licensed copy of the software with Kaba Access Control in order to use the software. Registering the software will help secure your system database and the locks on your site and will also aid Kaba Access Control in making you aware of any new software upgrades, patches, etc. when required.

On the jewel case of the E-Plex Advanced ACS software CD, you will see a sticker with the 6-digit Serial Number for the software and an 8-digit Factory Number. You will use both of these numbers to register the software.

The registration process is quite simple, and you can register the software in one of two ways:

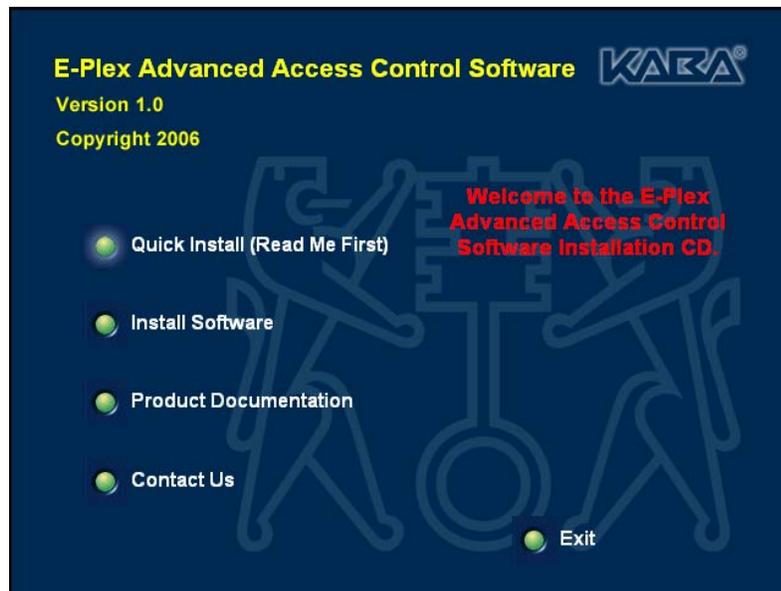
- Register online at Kaba Access Control's software registration website, anytime of the day or night (24/7).
- Register by calling our Technical Support line at 800-849-8324 or 336-735-1331, Monday through Friday between 8:00 AM and 5:00 PM Eastern Standard Time.

Important: You will not be able to install the software if you do not complete the registration process with Kaba Access Control.

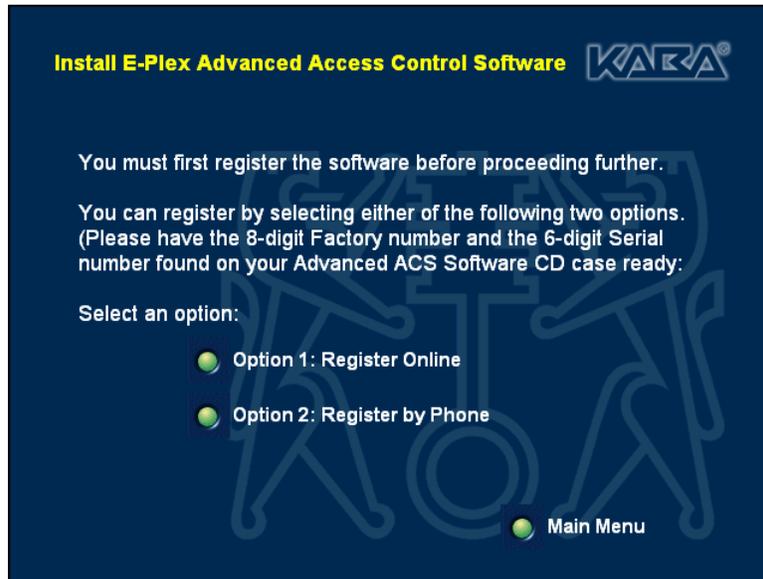
Software Registration

Complete the following steps to register the software:

1. Insert the E-Plex Advanced ACS Installation CD into the appropriate drive of the PC.
2. The E-Plex Advanced ACS Software Installation Browser loads and displays the **E-Plex Advanced Access Control Software** browser menu.



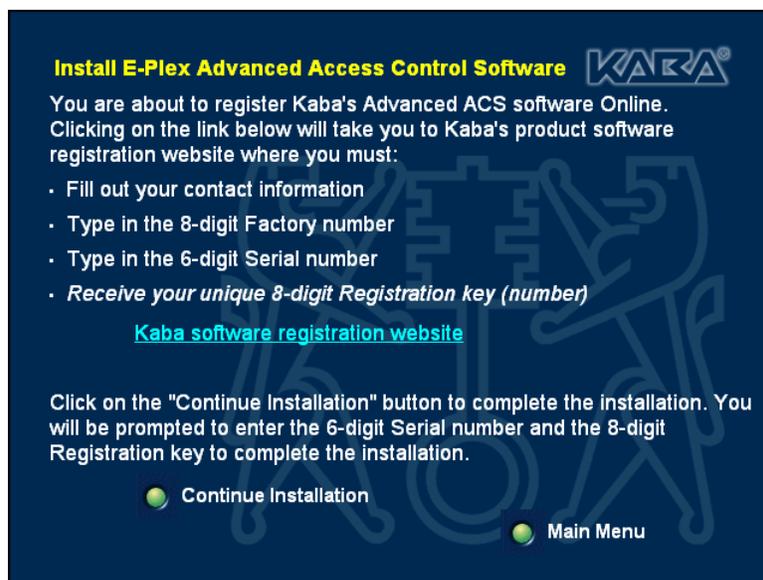
3. Click **Quick Install (Read Me First)**, and read the brief instructions and tips on the proper sequence of steps that you must follow when installing the E-Plex Advanced ACS software.
4. Close this screen and click **Install Software**. The system displays the following screen, which prompts you to choose an option to register your software – through Kaba Access Control's dedicated website or by calling Kaba Access Control's Technical Support phone line, as shown below:



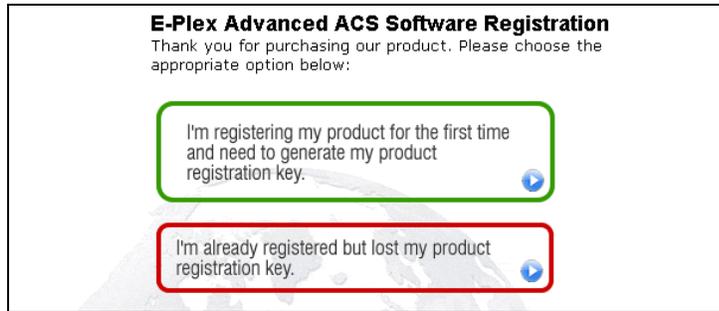
If you click **Option 1: Register Online**, proceed to the next step. If you click **Option 2: Register by Phone**, proceed to step 16.

Option 1: Registering Through Kaba Access Control's Website

5. This action assumes that your PC can connect to the Internet. When you select this option, the system displays the following screen directing you to Kaba Access Control's software registration website:



6. Click the **Kaba software registration website** link. The system opens your default Web browser to the **E-Plex Advanced ACS Software Registration** page.



E-Plex Advanced ACS Software Registration
Thank you for purchasing our product. Please choose the appropriate option below:

I'm registering my product for the first time and need to generate my product registration key.

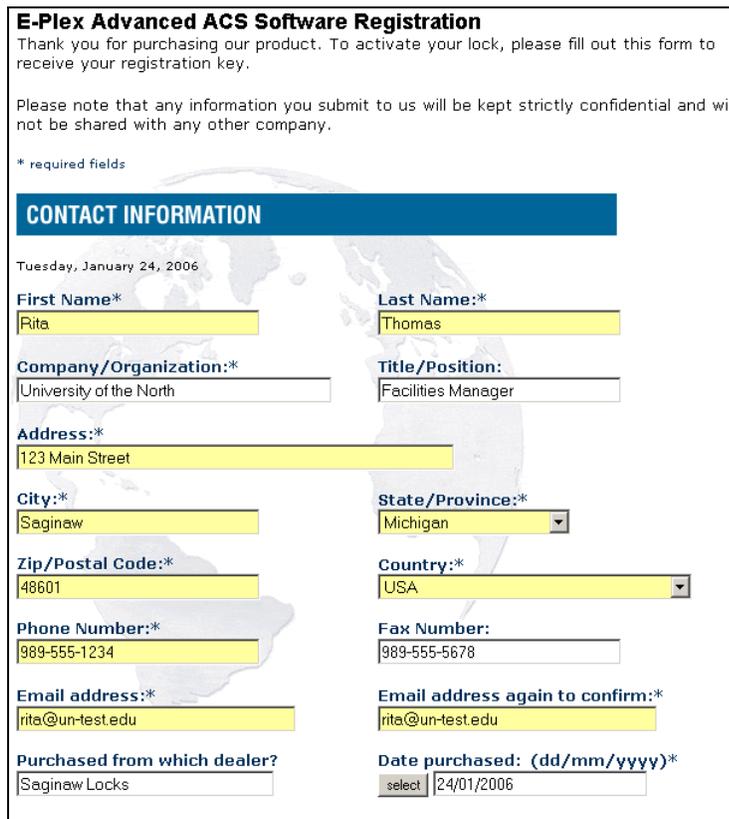
I'm already registered but lost my product registration key.

If you are registering for the first time, proceed to step 7.

If you lost your registration key, and need to retrieve it from Kaba Access Control, proceed to step 13.

Registering for the First Time:

7. If you are registering your software for the first time, select the first (Green) option. The system displays the **E-Plex Advanced ACS Software Registration** page.



E-Plex Advanced ACS Software Registration
Thank you for purchasing our product. To activate your lock, please fill out this form to receive your registration key.

Please note that any information you submit to us will be kept strictly confidential and will not be shared with any other company.

* required fields

CONTACT INFORMATION

Tuesday, January 24, 2006

First Name:* Rita **Last Name:*** Thomas

Company/Organization:* University of the North **Title/Position:** Facilities Manager

Address:* 123 Main Street

City:* Saginaw **State/Province:*** Michigan

Zip/Postal Code:* 48601 **Country:*** USA

Phone Number:* 989-555-1234 **Fax Number:** 989-555-5678

Email address:* rita@un-test.edu **Email address again to confirm:*** rita@un-test.edu

Purchased from which dealer? Saginaw Locks **Date purchased: (dd/mm/yyyy)*** select 24/01/2006

8. Complete the fields of the **Contact Information** area. Fields followed by an asterisk (*) are required.
9. Complete the fields of the **Software Registration** area. Your Serial Number and Factory Number are located on the software jewel case.

SOFTWARE REGISTRATION

Select the lock model(s) that will be used with this software:*

E-Plex 5200 E-Plex 5700 Both

Select the software version:*

Purchased Software Demo Software

Serial Number:*(6 digits)

Factory Number:*(8 digits / 4 digits per entry field)

10. Complete the fields of the **Optional Information** area if you choose to provide additional information to Kaba Access Control. A sample of some of the fields is shown below.

OPTIONAL INFORMATION

What factor influenced your decision to purchase this product?

Advertisement

Sales Representative

Security Consultant

Other / specify:

What type of installation will be utilizing the software? (check all that apply)

Commercial Building

College / University

School / Educational

Airport

Note: Information submitted is kept private and used only by Kaba Access Control for informational purposes.

11. When you have completed the registration, click **Submit**.

▶ SUBMIT
▶ CLEAR

Click on "SUBMIT" only once and wait. It may take up to 30 seconds for the system to process and validate your request.

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The system will automatically generate your unique 8-digit **Registration Key** based on your input:

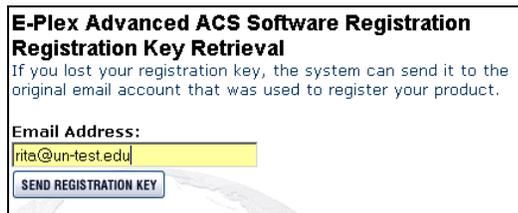
Your Registration Key: 37200992

Please write down your registration key number and close this page. Follow the software install screen prompts to finalize your installation.

12. Proceed to step 15.

Lost Registration Key:

13. If you lost your registration key, select the second (Red) option. The system displays the **Registration Key Retrieval** screen.

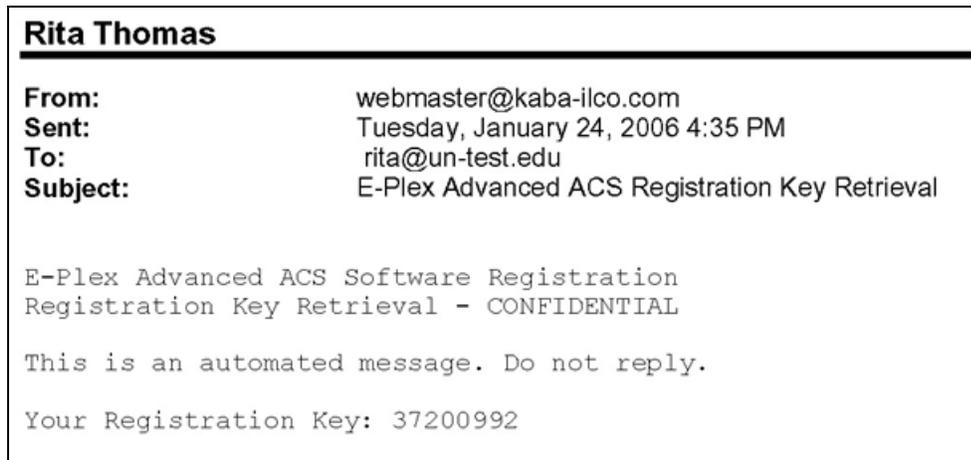


**E-Plex Advanced ACS Software Registration
Registration Key Retrieval**
If you lost your registration key, the system can send it to the original email account that was used to register your product.

Email Address:
rita@un-test.edu

SEND REGISTRATION KEY

14. Type your **Email Address** in the field and click **Send Registration Key**.
You will receive an e-mail from Kaba Access Control with your Registration Key.



Rita Thomas

From: webmaster@kaba-ilco.com
Sent: Tuesday, January 24, 2006 4:35 PM
To: rita@un-test.edu
Subject: E-Plex Advanced ACS Registration Key Retrieval

E-Plex Advanced ACS Software Registration
Registration Key Retrieval - CONFIDENTIAL

This is an automated message. Do not reply.

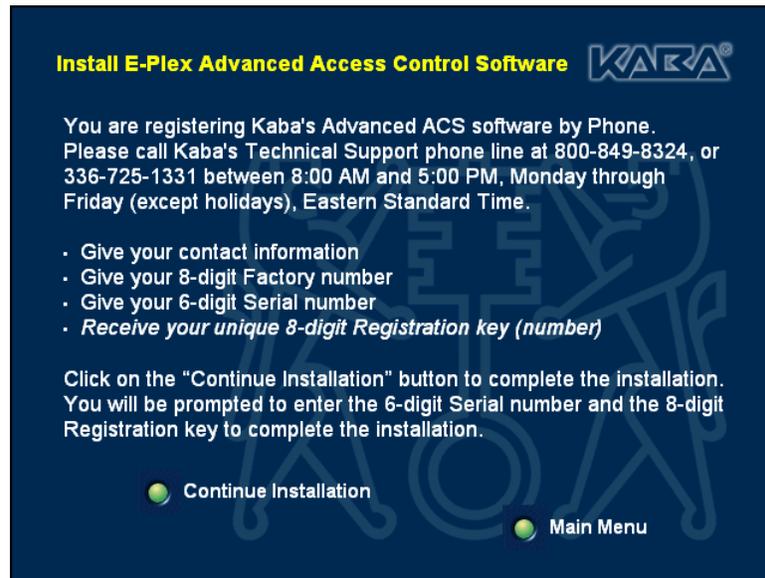
Your Registration Key: 37200992

15. Write your Registration Key down and close the window. On the **Install E-Plex Advanced Access Control Software** screen, click **Continue Installation** to complete the installation.

You will be asked to enter your Registration Key along with the Factory Number later to complete the installation. Proceed to **Software Installation** in this chapter.

Option 2: Registering by Phoning Kaba Access Control's Technical Support

16. When you click this option, the system displays the following screen:



Follow the instructions on the screen to register by calling Kaba Access Control's Technical Support line.

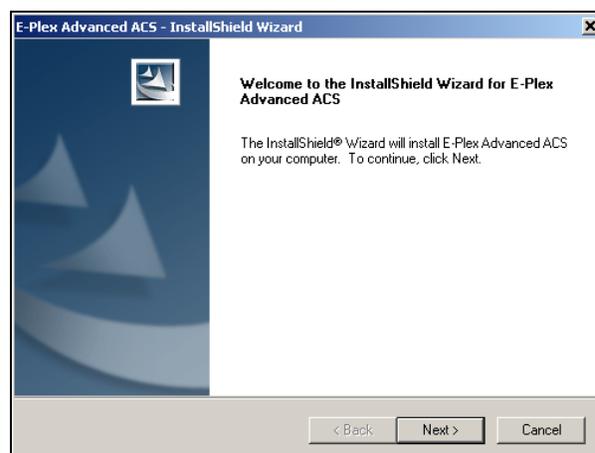
17. Kaba Access Control's Technical Support personnel will first register your contact info, Factory Number, and Serial Number for your software CD, and will then give you a unique 8-digit **Registration Key** for your software over the phone.
18. Write your Registration Key down and click **Continue Installation** to complete the installation.

You will be asked to enter your Registration Key along with the Factory Number to complete the installation. Proceed to **Software Installation** below.

Software Installation

Complete the following steps after software registration to install the E-Plex Advanced ACS Software.

1. After you click **Continue Installation** on the **Install E-Plex Advanced Access Control Software** screen, the system displays the InstallShield Wizard screen.



The InstallShield Wizard guides you through the software setup and installation after you have registered the software with Kaba Access Control. During installation, an E-Plex Advanced ACS icon is added to the Windows Desktop screen and to the Windows Program menu. A menu item is generated for E-Plex Advanced ACS, displaying the following sub-menu options:

- E-Plex Advanced ACS Help
 - E-Plex Advanced ACS
 - Install E-Plex Palm Interface Application on Palm Organizer
 - Install Palm HotSync E-Plex ACS Conduit
 - Uninstall Palm HotSync E-Plex ACS Conduit
2. Follow the InstallShield Wizard prompts to complete installation. During installation, the system displays the **Enter Registration Information** screen.

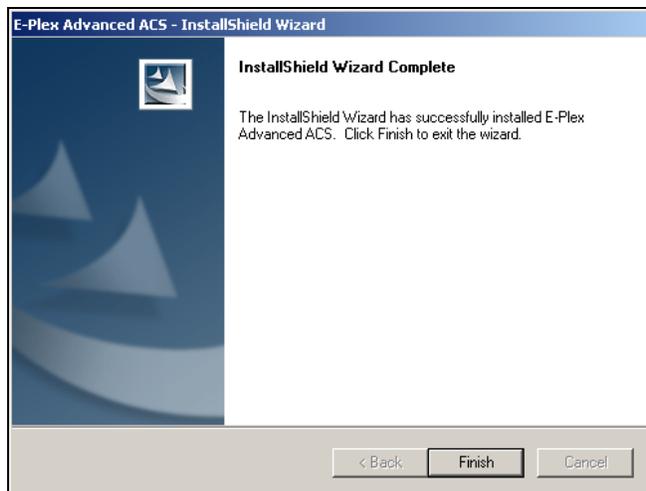


3. Complete the **Enter Serial number** and **Enter Registration key** fields.
4. Click **OK**. The system congratulates you for successful registration.



5. Click **OK**.

The system displays the **InstallShield Wizard Complete** screen, indicating that the software installation is complete.



6. Click **Finish** to exit the InstallShield Wizard.

Customer Key Security

After successful registration, the system automatically generates a unique 16-digit **Customer Key**, which will be your system security key. This Customer Key will be used throughout your facility as part of system security – in your PC database, the M-Unit handheld, and the E-Plex 5200 and E-Plex 5700 locks.

Your 16-digit Customer Key can be read anytime from the **Help | About** screen of the E-Plex Advanced ACS software, as shown below.



This same Customer Key must also be entered in your M-Unit(s) before programming and/or auditing the E-Plex 5200 and E-Plex 5700 locks.

Example of Software Registration Data Input and Output

A 6-digit Serial Number	=	123456
and an 8-digit Factory Number	=	0511 0100
will generate an 8-digit Registration Key	=	3720 0992
so that your unique Customer Key will be	=	0511-0100-3720-0992
which is a combination of:		[Factory No. + Registration No.].

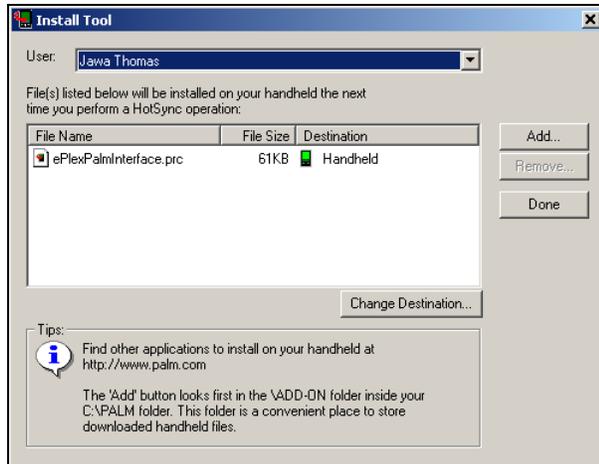
Installing the E-Plex Palm Interface Application on the M-Unit (Palm PDA)

Once the E-Plex Advanced ACS application is installed, complete the following steps to install the E-Plex Palm Interface Application on the M-Unit (Palm PDA):

1. Select **Start | Programs** from the Windows task bar.
2. Select the **E-Plex Advanced ACS** menu item.
3. From the **E-Plex Advanced ACS** menu, select **Install E-Plex Palm Interface Application on Palm Organizer**.



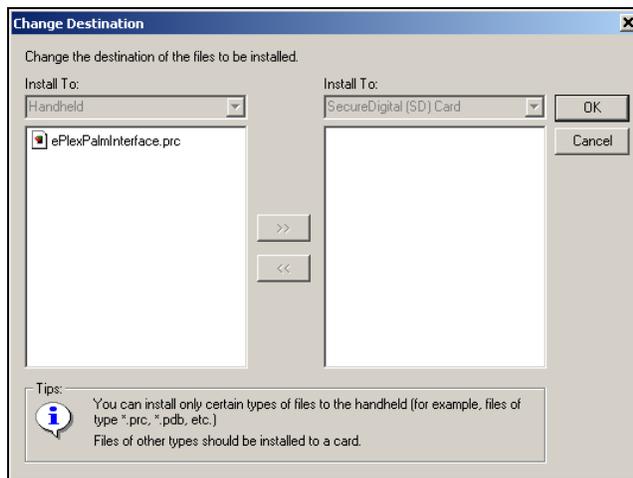
The system displays the **Install Tool** screen, followed by the **Confirm Add** window:



4. Click **Done**.

–OR–

If you want to change the destination (for example, to a Memory Card in the Palm), click **Change Destination**. The system displays the **Change Destination** screen.



5. Select the file from the **Install To:** field and click the >> button.
6. Click **OK**. The software returns to the **Install Tool** window.
7. Click **Done**.

The software files that are required for the M-Unit to program and audit an E-Plex 5200/E-Plex 5700 lock have now been prepared for transfer to the M-Unit. When you connect the M-Unit to your PC and perform a HotSync operation, the system transfers the E-Plex ACS M-Unit software files from the PC to the M-Unit and automatically installs them on the M-Unit.

8. Ensure that the M-Unit is placed correctly into the cradle, or is connected via the HotSync cable, and turn on the M-Unit.
9. Ensure that the HotSync Manager is active by checking to see if the **HotSync** icon is visible in the system tray. If it is not active, load the HotSync Manager per the Palm Desktop instructions.
10. Tap the **HotSync** icon from the M-Unit main menu or press the **HotSync** button on the cradle.

HotSyncing the M-Unit

Complete the following steps to HotSync the M-Unit. This installs the E-Plex ACS application on the M-Unit.

1. From the main screen of the M-Unit, tap the **HotSync** icon.

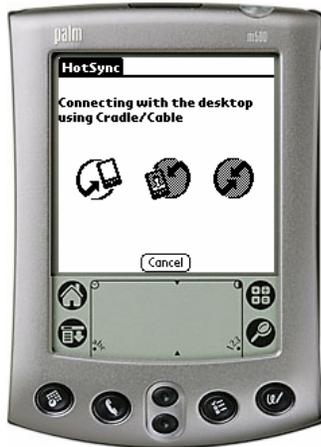


2. When the following screen appears, ensure **Cradle/Cable** or just **Cable** (depending on the type of PDA you have) is selected. You will receive a series of messages while the HotSync is in progress.



3. Tap the HotSync button. The following screens appear on the M-Unit and PC Desktop while the M-Unit connects with the PC.

M-Unit



PC Desktop



4. When the HotSync is complete, you will receive a message that it was successful.



5. Once the HotSync operation is complete, tap the **Home** icon to return to the Palm Main Menu. The **E-Plex ACS** icon should now be visible on the Palm Main Menu.

Windows XP vs. Palm HotSync vs. E-Plex Advanced ACS Software Compatibility

When using the E-Plex Advanced ACS Software with certain Windows XP PCs, a software compatibility problem exists if older versions of the Palm Desktop OS and its HotSync Manager are installed. For example, in some XP PCs with Palm Desktop OS 4.x and HotSync Manager 4.x, you may experience problems HotSyncing your M-Unit. If you encounter this compatibility problem with your XP PC and Palm Desktop, follow the steps below to resolve it.

Important: Before you download the updates, you must have already installed on your XP PC Palm Desktop OS 4.x or higher. You must download the newer **Palm Desktop 4.1.4E** upgrade from the Palm website, irrespective of what model of Palm PDA you currently have.

Complete the following steps to resolve the compatibility issue:

1. Go to the following download page of the Palm website:
<http://www.palm.com/us/support/downloads/windesk414e.html>
2. Scroll the page all the way to the bottom and click on the following link:
 1. **Ready to download? Begin here. (42MB file)**
3. Follow the on-screen download instructions to upgrade your current Palm Desktop and HotSync Manager to the newer **Palm Desktop 4.1.4E** and **HotSync Manager 6.0.1**.

The next time you HotSync the E-Plex Advanced ACS software between your XP PC and M-Unit, your PC and M-Unit will successfully upload and download data.

Entering Customer Key Information Into the M-Unit

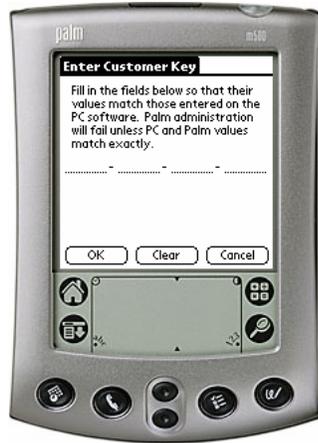
Before you can transfer files to the lock, you must complete the registration of the M-Unit.

1. On the M-Unit, tap the **E-Plex ACS** icon. The M-Unit prompts you to set the Customer Key before you can continue.

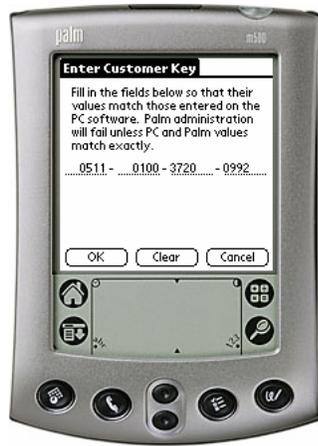


► Getting Started

2. Click **OK**. The M-Unit displays the **Enter Customer Key** screen.



3. Using the stylus and M-Unit's "Keyboard" function, enter your 16-digit customer key in the fields.



Note: You must click in each field, press the **Number** icon on the PDA's silkscreen, and tap the numbers. You can locate your Customer Key in the **Help | About** menu screen of the PC software once you have registered the E-Plex Advanced ACS software.

4. Click **OK**.

- If your Customer Key changes for any reason, i.e., for security reasons, you can access the **Enter Customer Key** screen from the **E-Plex ACS** menu by selecting **Cust. Key**.



You will now be able to program and audit the E-Plex 5200/E-Plex 5700 locks using the M-Unit.

Installing the Prox Card Reader/Enroller (E-Plex 5700 Only)

If you are using a Prox Card Reader/Enroller with the system, you should attach it to a USB port on the PC before you start the software for the first time. You should enable the device (as connected) in the **System Setup | System Settings** menu of the E-Plex Advanced ACS software.

Starting the E-Plex Advanced ACS Software on the PC

You can start the E-Plex Advanced ACS on the PC by clicking the **E-Plex Advanced ACS** icon on the Desktop (recommended).

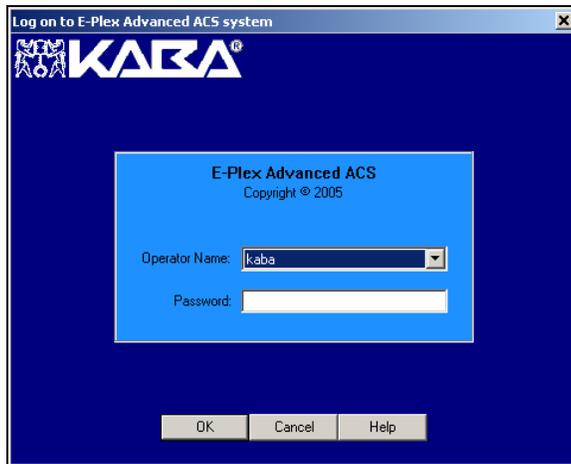


Or, you can start the software from the Windows **Start | Programs** menu.



Logging On for the First Time

The E-Plex Advanced ACS has now been loaded and is ready for login. The software displays the **E-Plex Advanced ACS logon** screen:



Note: The default Operator Name is “kaba” and Password is “kaba”. These will only be used for the initial logon to the E-Plex Advanced ACS, and both must be changed to proceed further.

1. The software prompts you to create a new logon ID.



2. Click **OK**. The software displays the **Make New Operator** window:



You must create a new operator at this time.

3. In the **Operator Name for Level 1 Operator** field, type a new operator name.

Note: The **Operator Name** is case-sensitive and can be a maximum of 20 characters.

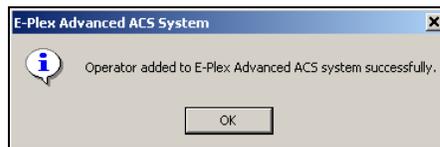
- In the **Password for Level 1 Operator** field, type a password for the new operator.

Note: The password must be between six and ten characters. The password is case-sensitive.

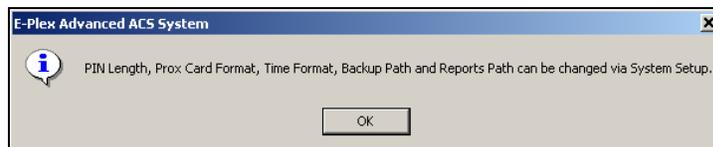
- In the **Verify Password for Level 1 Operator** field, re-type the new password for confirmation.

Note: Be sure to make a note of the password that was specified. If it is lost, you will have to reinstall your E-Plex Advanced ACS software, or call Kaba Access Control's Technical Support line for assistance. It is recommended that you create another operator for the software so that you have more than one entry path into the software.

- Click **OK**. The software displays the following message:

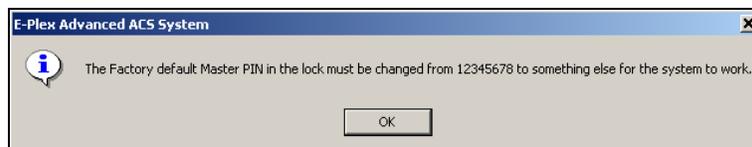


- Click **OK**. The software displays the following message:



- Click **OK**. The software prompts you to change the factory default eight-digit Master PIN to some other eight-digit Master PIN.

Note: You must change the factory default Master PIN—12345678—to some other eight-digit PIN, both here in the software and at the lock pushbutton/keypad. Otherwise, you cannot use the E-Plex Advanced ACS lock system.



- Click **OK**. The software displays the **New Master PIN** window:



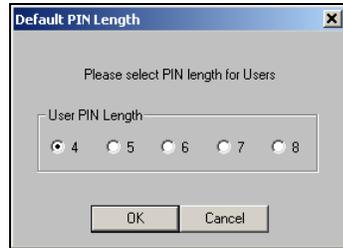
- In the **Master PIN** field, type the new global Master User PIN for all locks.

Note: The Master PIN must be eight digits long.

11. In the **Verify Master PIN** field, re-type the new Master PIN for confirmation.

Note: Be sure to record the new Master User PIN that was specified.

12. Click **OK**. The software prompts you to change the default PIN length.



13. Select the PIN length from the **User PIN Length** options.

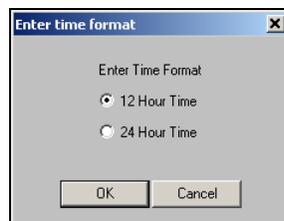
14. Click **OK**. The system prompts you to enter the card format.



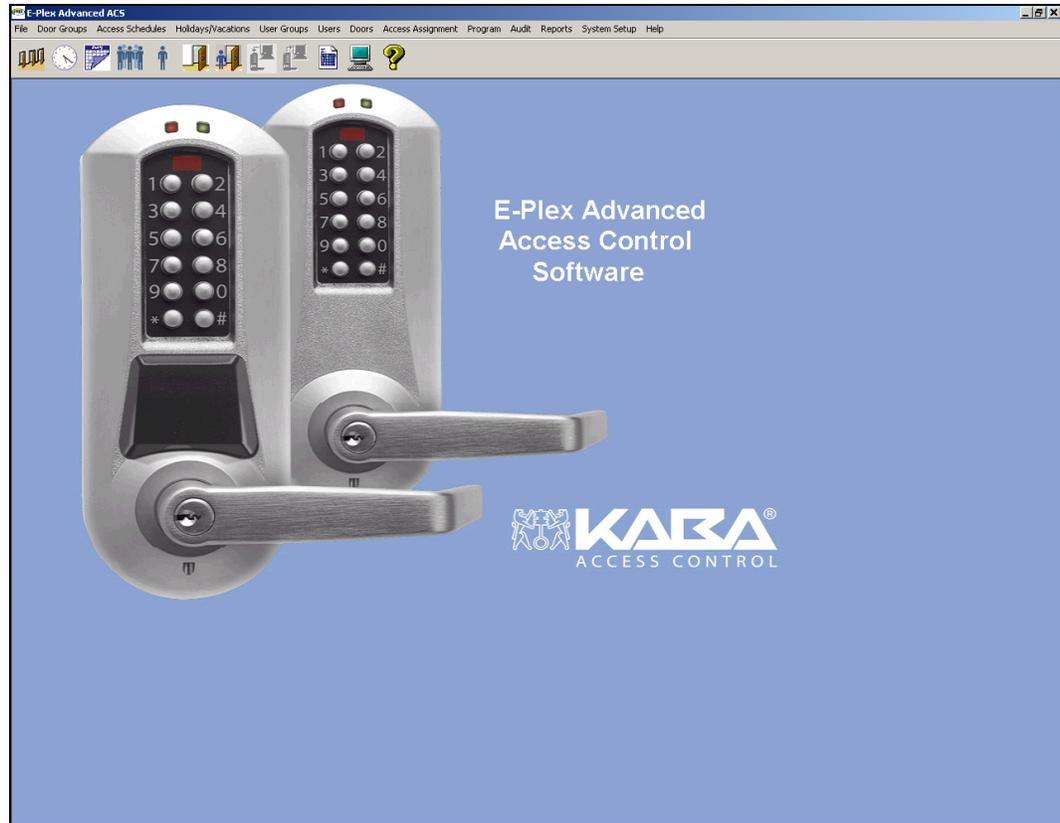
15. Select the card format from the **Wiegand Bit Format for Prox Cards** options.

Note: If you only use E-Plex 5200 locks in your facility, Prox Card setup is not required. Simply proceed to the next step.

16. Click **OK**. The system prompts you to enter a time format.



The software displays the Main Menu for the E-Plex Advanced ACS:



Main Menu and Toolbar

This section describes the Main Menu and Toolbar, which are the primary points to access the functions of the E-Plex Advanced ACS.

Main Menu

The Main Menu provides access to all functions and displays the available menu options.



The following 13 drop-down menus are available from the Main Menu:

1. File
2. Door Groups
3. Access Schedules
4. Holidays/Vacations
5. Users Groups
6. Users
7. Doors
8. Access Assignment
9. Program
10. Audit

► Getting Started

11. Reports
12. System Setup
13. Help

Refer to the appropriate section in the manual for more detail on each of the options that are available from the drop-down menus. These options are also available from the Toolbar.

Toolbar

The Toolbar is located directly below the Main Menu and displays the icons for the Main Menu options.



You can select an icon on the toolbar by positioning the mouse pointer on the icon and clicking the left mouse button one time. The menus available from the E-Plex menu bar and the corresponding Toolbar icon (if applicable) are described in the following sections.

File Menu



From the **File** menu, you can back up data files and restore them, export and import lists of users, and exit the software.

You can export your E-Plex Advanced ACS user information from the software as a tab-delimited text file with the following information:

- Last Name
- First Name
- User Group
- User Type
- Card ID
 - 27–84-bit Wiegand HID Card (8-digit hexadecimal number)
- Formatted Card ID
 - 26-bit Wiegand (xxx-yyyyy), where xxx = 001 to 255 and yyyy = 00001 to 65535
- PIN

The first record in the text file will be the titles of the above seven fields, as shown below:

Last Name First Name User Group User Type Card ID Formatted Card ID PIN

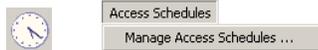
You can also import user information from another system using exactly the same tab-delimited text file format, including the header title record, as mentioned above. You can call Kaba Access Control's Technical Support for more help with importing or exporting user information.

Door Groups



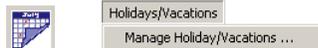
From the **Door Groups** menu, you can add, edit, or delete any number of door groups.

Access Schedules



From the **Access Schedules** menu, you can add, edit, or delete up to 16 access schedules. An access schedule is a defined time period during the span of a week in which users can be granted access to the door. One of the 16 schedules will have an “Always” access schedule that is built into the system software; this schedule cannot be changed or deleted. Schedules with different access credentials, for example PIN and Prox schedules and PIN only schedules, cannot overlap.

Holidays/Vacations



From the **Holidays/Vacations** menu, you can set up as many as 32 holiday and vacation schedules per lock, but any number of them in the software, including adding, editing, or deleting holidays or vacation blocks. When a holiday/vacation period (one day or a consecutive block of days) is assigned to a door, the door will NOT grant access to Access Users or M-Unit Users during that period. Holidays/Vacations can be overridden by all Service Users, plus any other selected “privileged” users and Manager Users.

User Groups



From the **User Groups** menu, you can add, edit, or delete any number of user groups.

Users



From the **Users** menu, you can add, edit, or delete up to 3,000 users and their associated PINs in a lock, but any number of them in the software. For E-Plex 5700 locks only, you can also add, edit, or delete their associated Prox Cards. There are five types of users:

- Manager
- Access
- Guest
- Service
- M-Unit

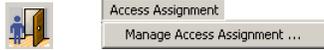
Refer to the **Summary of Pushbutton Programming Commands** table in Chapter 4, **Operating the E-Plex Lock**, for detailed access rights of each of these users.

Doors



From the **Doors** menu, you can add, edit, or delete any number of physical doors that have an E-Plex 5200/E-Plex 5700 lock in the software.

Access Assignment



Note: The **Access Assignment** menu is the most important menu; everything related to access control is tied together in this menu.

From the **Access Assignment** menu, you must select a door and assign the door schedules, holidays/vacations, and the users who should have access to this door. When you assign the access schedules to the door, you must also specify if the door schedule requires PIN access, Prox Card access (for E-Plex 5700 only), or dual credential access (for E-Plex 5700 only) and ensure that these schedules do not overlap. Also, for each user type, you must also assign a schedule and, optionally, assign any one or more of the following three privileges:

- Override holidays/vacations
- Override deadbolt
- First user passage entry

Finally, you also have the option to enable the passage mode function (by default, it is disabled). After this process, the lock configuration data is set up and prepared to be HotSynced to the M-Unit, and then uploaded to the door/lock.

Program



The **Program** area of the software is selected when the lock configuration data have been prepared to be uploaded to a door/lock. If data have been prepared, you can transfer (HotSync) the data to the M-Unit, so they can then be used to program the lock(s).

Audit



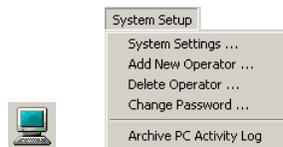
The **Audit** area of the software is selected when new audit data have been received from a door/lock via the M-Unit for reporting purposes. The data will then be available to view or print as an audit report. Each lock will always hold up to the last 30,000 audit events in its memory.

Reports



From the **Reports** menu, you can generate reports from the E-Plex Advanced ACS data. If data have also been received from a door/lock, you can select an option to generate a report from that data.

System Setup



From the **System Setup** menu, you can set up and maintain all system information, such as Wiegand bit format for Prox Cards and global PIN length for Users. You can add new Operators to the software, delete existing Operators, or modify the passwords for existing Operators. You can also archive PC System activity data from this menu.

Help



From the **Help** menu, you can access the online help or display the E-Plex Advanced ACS software Registration Key, version number, and copyright information.

3 Using the E-Plex Advanced ACS Software

This chapter explains how to use the E-Plex Advanced ACS software, including:

- System Setup Menu
- Managing Door Groups
- Managing Access Schedules
- Managing Holidays/Vacations
- Managing User Groups
- Managing Users
- Managing Doors
- Access Assignment
- Programming Locks
- Auditing Locks
- Reporting

System Setup Menu

The System Setup menu allows you to define and maintain global system settings that, in most cases, you need to do only once during the initial system setup.

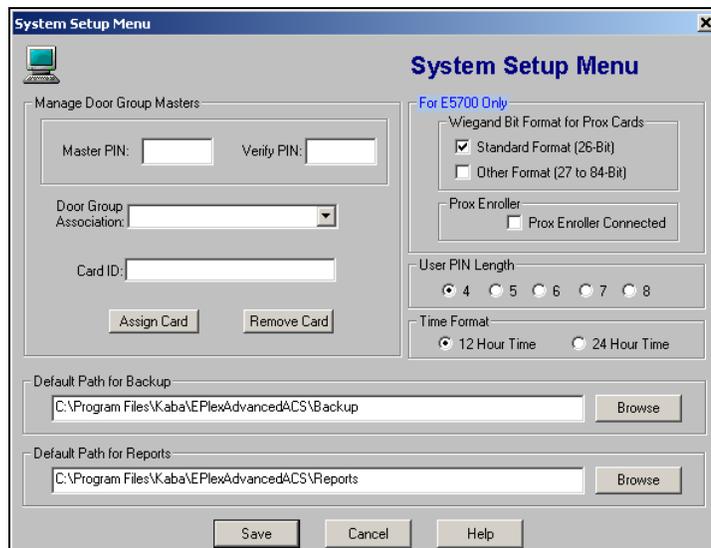
To access system settings, select an option from the **System Setup** menu or click the **System Setup** menu icon.



Changing System Settings

You should establish the system settings before you begin using the E-Plex Advanced ACS on a daily basis. However, you can use this feature at any time if you need to update or add to the existing information.

Click on the **System Settings** option. The system displays the **System Setup** menu.



1. Edit the following data areas as desired:

- **Door Group Association**

Here you can do one of two things:

- Change the existing global Master PIN for the entire system (i.e., all locks in all Door Groups).
- Assign different Master PINs for different Door Group locks.

- **Manage Door Group Masters**

Once you have selected one of the above two options, enter the changed Master PIN in the **Master PIN** field, and re-enter the PIN in the **Verify PIN** field.

Note: You must remember to change the factory Master PIN default of 12345678 to the new Master PIN entered here in the software for the system to work properly.

- **Card ID**

Optionally, you can also assign a Prox Card for the Master here, in which case the Master has to use dual credential (PIN and Prox Card) every time to program the lock at the lock keypad.

- **Wiegand Bit Format for Prox Cards (applies to E-Plex 5700 locks only)**

Select the appropriate **Wiegand Bit Format for Prox Cards** that you are using in your system. The default value is **Standard Format (26-Bit)**. If you select the non-standard **Other Format (27 to 84-Bit)**, you must use the Prox Card Reader/Enroller to assign Prox Cards for the users. In this case, the display of the card ID format in the Users dialog menu will not be in standard xxx-yyyy format, but will display as a long hexadecimal number only.

- **Prox Enroller (applies to E-Plex 5700 locks only)**

By default, the **Prox Enroller Connected** field is not selected. You must select this field only if you have the Prox Reader/Enroller device attached to the PC.

- **User PIN Length**

Select the appropriate global **User PIN Length**—between four and eight digits—that you will be using in your system. The default User PIN length is four digits.

- **Time Format and Daylight Savings Time (DST)**

Select the display of **Time Format** for your system. The default is **12-Hour Time** (a.m. and p.m. display), and the other option is **24-Hour Time** display.

The E-Plex Advanced ACS software will use the start and end dates/times of the DST setup (if enabled) directly from your PC's operating system. It will automatically send this information to the locks via the M-Unit, so that the DST switching in the lock will occur automatically.

- **Default Path for Backup**

This field defines the default directory path to be used when backing up system data files. You may change the backup path to a CD-RW drive, network drive, or another similar type of drive.

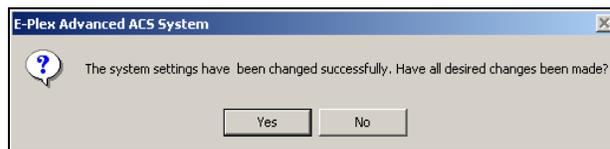
- **Default Path for Reports and PC Activity Log**

This field defines the default directory path to be used when generating and saving reports and archived data files. You may change the path for reports to a CD-RW drive, network drive, or another similar type of drive.

2. Once you have updated the desired fields, click **Save**. The software verifies whether any doors are affected and need to be re-programmed.



3. Click **OK**. The software confirms that the changes saved successfully and prompts you for further changes.



4. Click **Yes**. The software closes the **System Setup** menu window.

Making a New Operator

The Add New Operator option allows you to create a new Operator in the E-Plex Advanced ACS.

Note: The first Operator that you create in the software upon installation is the Level 1 Operator. You must be the Level 1 Operator to add or delete other Level 2 or Level 3 Operators.

Complete the following steps to create a new Operator:

1. From the **System Setup** menu, select **Add New Operator**. The software displays the **Make New Operator** window:



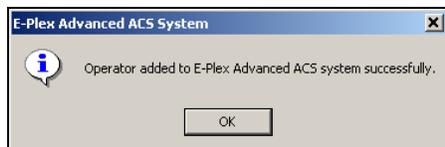
2. In the **Level 1 Operator Password** field, enter the password.
3. In the **Operator Name for New Operator** field, enter the name of the new Operator.

Note: The Operator name can be a maximum of 20 characters. The Operator name is case-sensitive.

4. In the **Password for New Operator** field, enter a password for the new Operator.
5. In the **Verify Password for New Operator** field, re-enter the password.
6. In the **Operator Level** field, click the Up and Down arrows to select the level of the new Operator.

Note: The Operator Level options are 2 and 3.

7. Click **OK**. The software displays confirmation that the Operator was added successfully:



8. Click **OK** again. The software closes the **Make New Operator** window.

Deleting an Operator

The Delete Operator option allows you to delete an Operator from the E-Plex Advanced ACS software. Complete the following steps to delete an Operator:

1. From the **System Setup** menu, select **Delete Operator**. The software displays the **Delete Operator** window:



2. In the **Level 1 Password** field, enter the password.
3. Click the Down arrow to select an Operator to delete from the list.
4. Click **OK**. The software prompts you for confirmation.



5. Click **Yes**. The software confirms that the Operator was removed from the database.



6. Click **OK**. The software closes the **Delete Operator** window.

Changing an Operator Password

The Change Password option allows you to change an Operator's password. Complete the following steps to change an Operator's password:

1. From the **System Setup** menu, select **Change Password**. The software displays the **Change Password** window.



2. From the **Operator Name** drop-down list, select an Operator.
3. In the **Current Operator Password** field, enter the current logon password of the Operator.
4. In the **New Operator Password** field, enter the new six-character logon password for the Operator.

Note: The Operator password must be exactly six characters long, and can consist of numbers, characters, spaces, and special characters (i.e. ~!@#\$\$%^&*, etc.).

5. In the **Verify New Password** field, re-enter the new password.
6. In the **Operator Level** field, type the level of the Operator.
7. Click **OK**. The software displays confirmation that the password changed successfully.

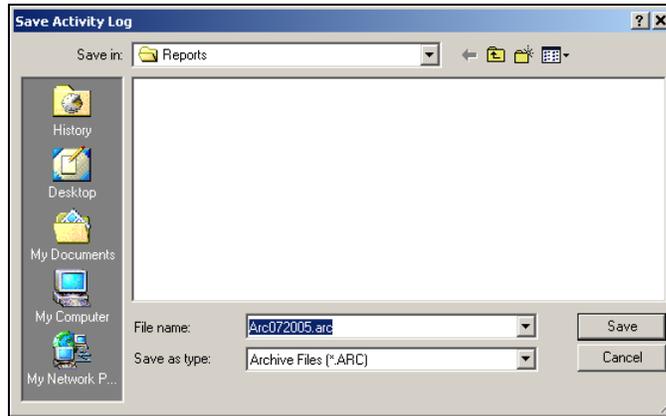


8. Click **OK** again. The software closes the **Change Password** window.

Archiving the PC Activity Log

The Archive PC Activity Log function allows you to archive and remove old records in the system activity log. Complete the following steps to archive the PC Activity Log.

1. From the **System Setup** menu, select **Archive PC Activity Log**. The software displays the **Save Activity Log** window:



2. Type the archive file name in the **File name** field; the default name is “ArcMMDDYY,” where MM=month, DD=day, and YY=year.
3. Click **Save**. The software displays the **Archive PC Activity Log** window:



4. Select the date at which the archive cutoff is established.

Note: The default date displayed will be the first of the month preceding the current month.

- To navigate the calendar by month, click the Left and Right arrows to either side of the month and year.
- To select a specific month of the current year, click the month displayed and select a different month from the list.
- To select a different year, click the year and use the Up and Down arrows to select a different year.

- Once the appropriate month and year are displayed, select the exact archive date by clicking the date on the calendar. The date should be circled in blue.
5. Click **OK**. The software confirms that the Activity Log archive is complete.



6. Click **OK** again. The software closes the **Archive PC Activity Log** window.

Managing Door Groups

Door Groups provide a way to manage multiple doors at a site. The E-Plex Advanced ACS software allows Operators to group doors according to any criteria.

For example, your site may be a small college campus where you will be installing the E-Plex 5200 and/or the E-Plex 5700 locks in four different buildings. In this case, you can create four different door groups and name them Admin Bldg, Library, R&D Bldg, and Dorm-A. Or, you can create many door groups within a building like Classrooms, Maintenance Areas, and Faculty Offices.

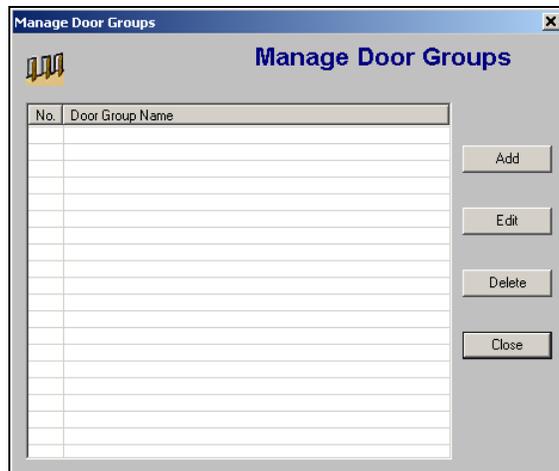
The E-Plex Advanced ACS software allows you to manage door groups from the **Door Groups** menu.

Note: You can define any number of door groups in the software.

To manage door groups, from the **Door Groups** menu select **Manage Door Groups**, or click the **Manage Door Groups** button.



The software displays the **Manage Door Groups** window.

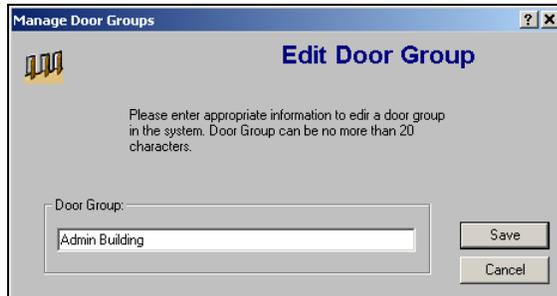


From this window, you can add, edit, or delete door groups.

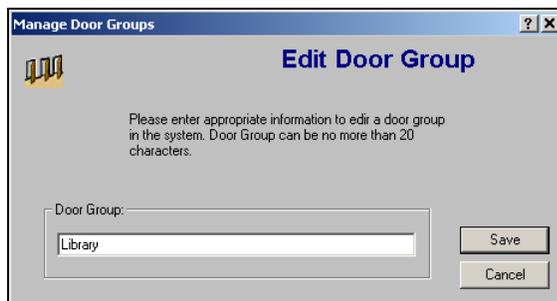
Editing a Door Group

Complete the following steps to edit a door group:

1. From the **Manage Door Groups** window, select a door group to edit by clicking it.
2. Click **Edit**. The software displays the **Edit Door Group** window.

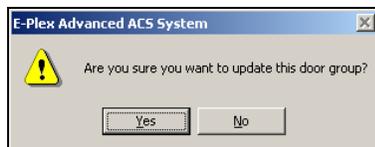


3. In the **Door Group** field, change the name of the door group.

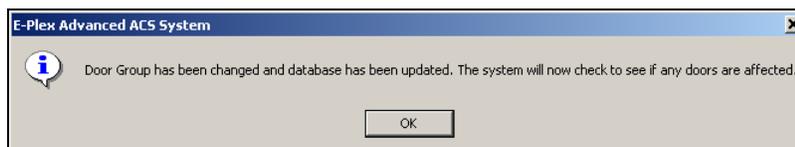


Note: The **Door Group** name can be a maximum of 20 characters and may include special characters and spaces.

4. Click **Save**. The software prompts you for confirmation.



5. Click **Yes** to update the door group. The software alerts you that the database has been updated and that it will search for affected doors.



6. Click **OK**. If no door groups were affected, the software alerts you.



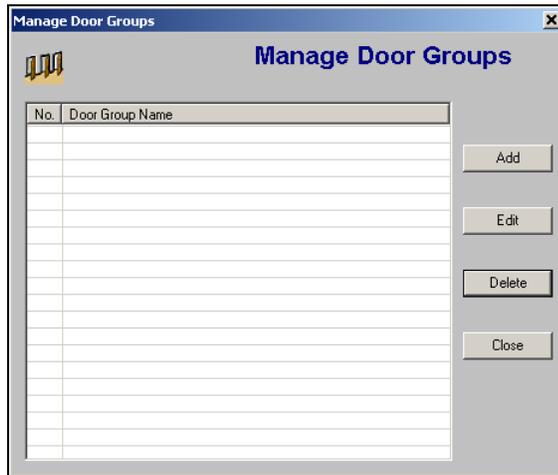
If you click **Yes**, the software prompts you for confirmation.



4. Click **Yes**. The software alerts you that the door group has been deleted from the database.



5. Click **OK**. The software returns to the updated **Manage Door Groups** window.



Note: You should update your locks to reflect modified door groups by programming the M-Unit and uploading the information to the locks. For more information, refer to **M-Unit Handheld PDA** in Chapter 5, **Programming and Auditing Locks**.

Managing Access Schedules

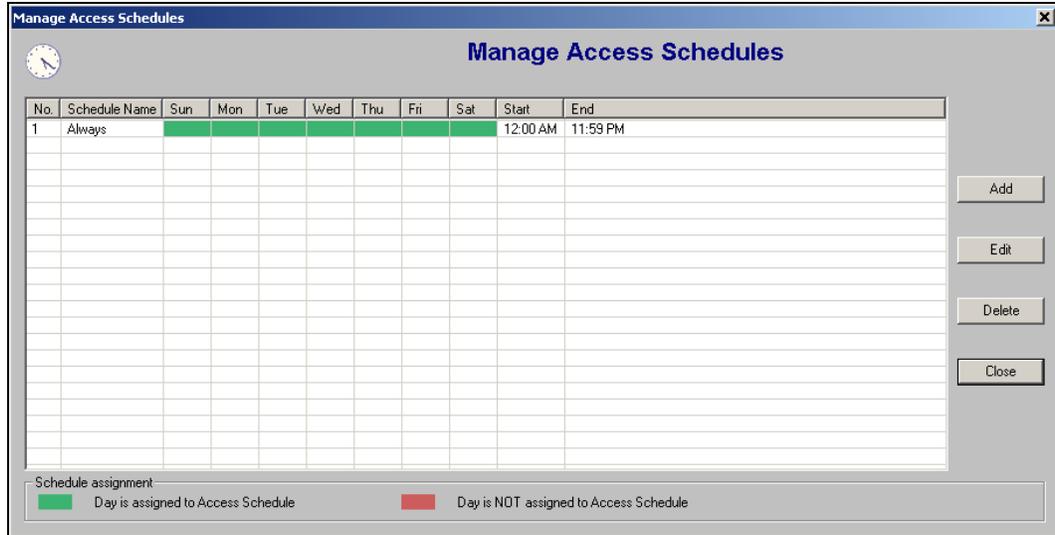
An Access Schedule is a defined time period during the span of a week in which users can be granted access to the door. The E-Plex Advanced ACS software allows you to globally define access schedules. Once you have defined access schedules, you will assign them to doors and to the users who will access those doors. The E-Plex Advanced ACS software allows you to manage access schedules through the **Access Schedules** menu.

Note: You can define a maximum of 16 access schedules in the lock, but any number of them in the software. However, the **Always** access schedule is standard and is pre-defined in the software. It cannot be changed or deleted. The **Always** schedule allows 24/7 access to its associated doors and users.

To manage access schedules, from the **Access Schedules** menu select **Manage Access Schedules**, or click the **Manage Access Schedules** button.



The software displays the **Manage Access Schedules** window.



From this window, you can add, edit, or delete access schedules.

Adding an Access Schedule

Complete the following steps to manage access schedules.

Note: You may add additional access schedules at any time.

1. From the **Manage Access Schedules** window, click **Add**. The software displays the **Add Access Schedule** window.



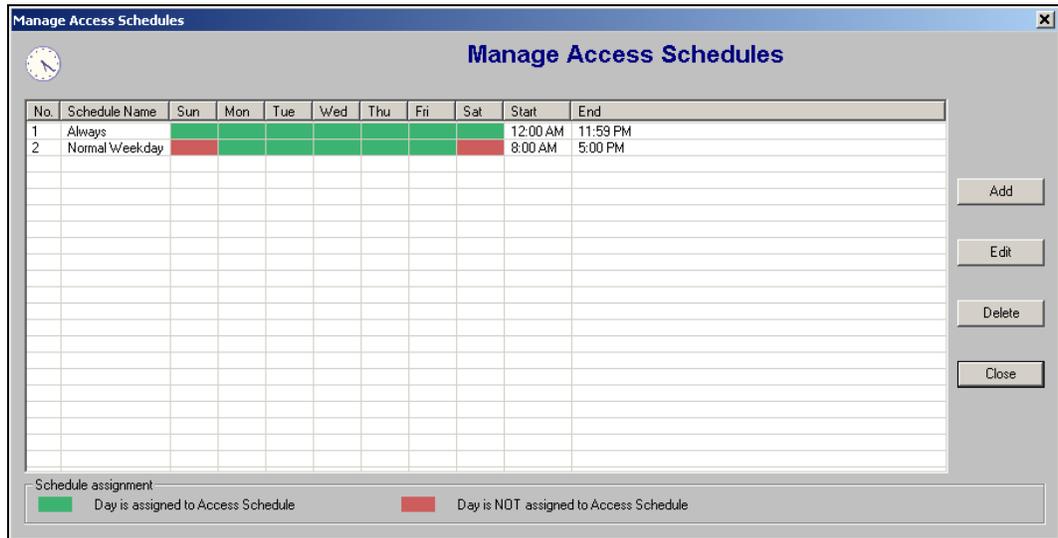
2. In the **Access Schedule Name** field, type the name of the access schedule you are adding.

Note: The access schedule name can be a maximum of 20 characters and may include special characters and spaces.

3. Select the appropriate check box for the day(s) you want to add to the access schedule. These are the days that users will have access to a door.
4. In the **Start Time** field, type or select a start time. This is the time that access begins each day.

► Using the E-Plex Advanced ACS Software

5. In the **End Time** field, type or select an end time. This is the time that access ends each day.
6. Click **Save**. The software displays the new access schedule in the **Manage Access Schedules** window.

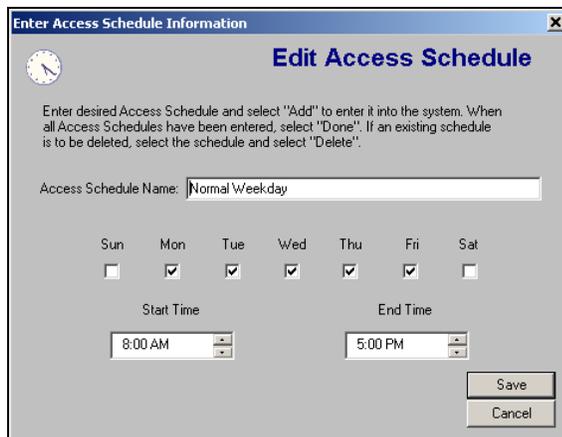


Note: Once added, the access schedule becomes available in the **Access Schedule** drop-down list throughout the E-Plex Advanced ACS software.

Editing an Access Schedule

Complete the following steps to edit access schedules.

1. From the **Manage Access Schedules** window, select an access schedule to edit by clicking it.
2. Click **Edit**. The software displays the **Edit Access Schedule** window.



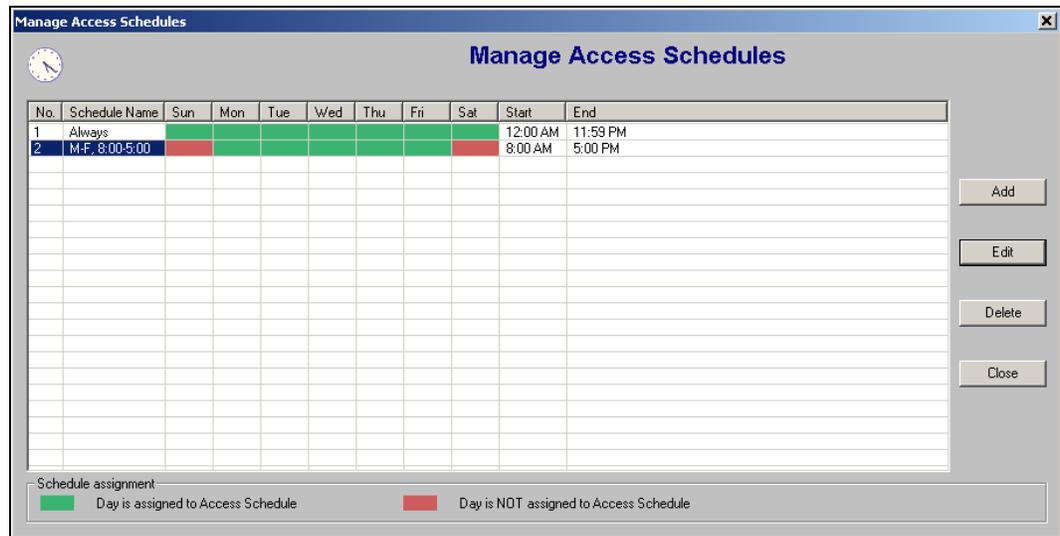
- In the **Access Schedule Name** field, change the name of the access schedule.

- Select the appropriate check box for the day(s) you want to change in the access schedule. These are the days that users will have access to a door.
- In the **Start Time** field, change the start time, if necessary. This is the time that access begins each day.
- In the **End Time** field, change the end time, if necessary. This is the time that access ends each day.
- Click **Save**. The software prompts you for confirmation.

- Click **Yes** to update the access schedule. The software alerts you that the database has been updated and that it will search for affected doors.

- Click **OK**. If doors were affected, the software alerts you with a list of doors that need to be re-programmed; else, the following screen is displayed.

10. Click **OK** again. The software displays the edited access schedule in the **Manage Access Schedules** window.

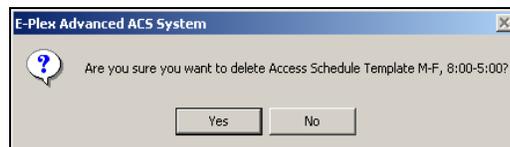


Note: You should update your locks to reflect modified door groups by programming the M-Unit and uploading the information to the locks. For more information, refer to *M-Unit Handheld PDA* in Chapter 5, **Programming and Auditing Locks**.

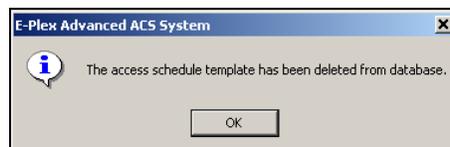
Deleting Access Schedules

Complete the following steps to delete access schedules.

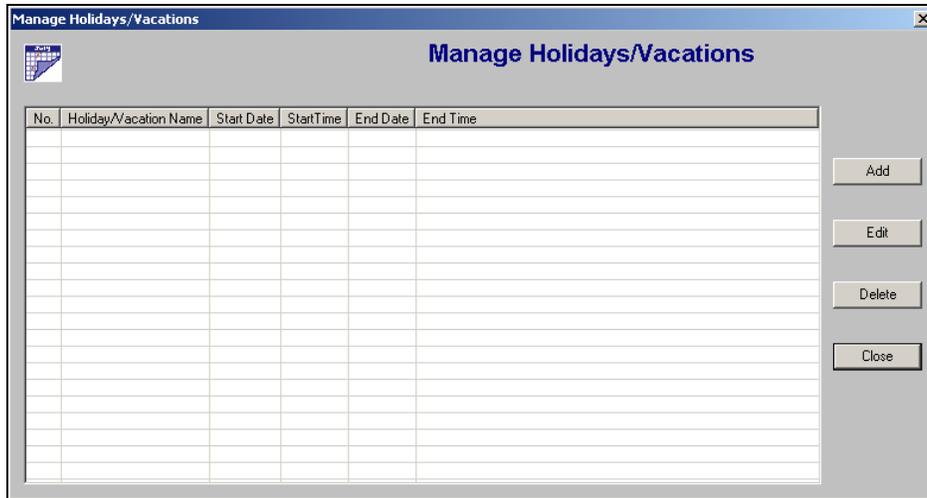
1. From the **Manage Access Schedules** window, select an access schedule to delete by clicking it.
2. Click **Delete**. The software prompts you for confirmation.



3. Click **Yes** to confirm the deletion. The software alerts you that the access schedule has been deleted from the database.



The software displays the **Manage Holidays/Vacations** window.



From this window, you can add, edit, or delete holidays or vacations.

Adding a Holiday/Vacation

Complete the following steps to add a holiday/vacation.

1. From the **Manage Holidays/Vacations** window, click **Add**. The software displays the **Add Holiday/Vacation** window.

2. In the **Holiday/Vacation Name** field, type the name of the holiday or vacation you are adding.

Note: A holiday or vacation name can be a maximum of 16 characters and may include special characters and spaces.

3. Leave the **All Day Event** check box selected if you want a 24-hour period holiday like New Year's Day. Uncheck the box if the holiday or vacation you are entering is a block of consecutive vacation days with specific start/end dates and times.

Note: The **All Day Event** check box is selected by default.

Editing a Holiday/Vacation

Complete the following steps to edit a holiday/vacation.

1. From the **Manage Holidays/Vacations** window, select the holiday or vacation you want to edit by clicking it.
2. Click **Edit**. The software displays the **Edit Holiday/Vacation** window.

Enter Holiday/Vacation Information

Edit Holiday/Vacation

Please enter desired holiday/vacation and select "Add" to enter it into the system. Once all holidays/vacations have been entered, select "Done". To delete a holiday/vacation, select it from dropdown list and select "Delete".

NOTE: 11:59 PM (23:59) indicates end of the calendar day.

Holiday/Vacation Name:

All Day Event

Start Date and Time:

End Date and Time:

3. In the **Holiday/Vacation Name** field, change the name of the holiday or vacation.
4. Clear the **All Day Event** check box if the holiday or vacation you are changing is NOT an all day event (24 hours).
5. In the **Start Date and Time** field, change the start date, if necessary, using the drop-down list and selecting the date from the calendar.
6. In the **Start Time** field, change the start time, if necessary, by using the Up and Down arrows.

Note: The **Start Time** field will be grayed out if the **All Day Event** check box is selected.

7. In the **End Date and Time** field, change the end date, if necessary, using the drop-down arrow and selecting the date from the calendar.
8. In the **End Time** field, change the end time, if necessary, by using the Up and Down arrows.

Note: The **End Time** field will be grayed out if the **All Day Event** check box is selected.

9. Click **Save**. The software prompts you for confirmation.

E-Plex Advanced ACS System

Are you sure you want to update this holiday?

Deleting a Holiday/Vacation

Complete the following steps to delete a holiday/vacation.

Note: You cannot delete a holiday or vacation if it is assigned to a door.

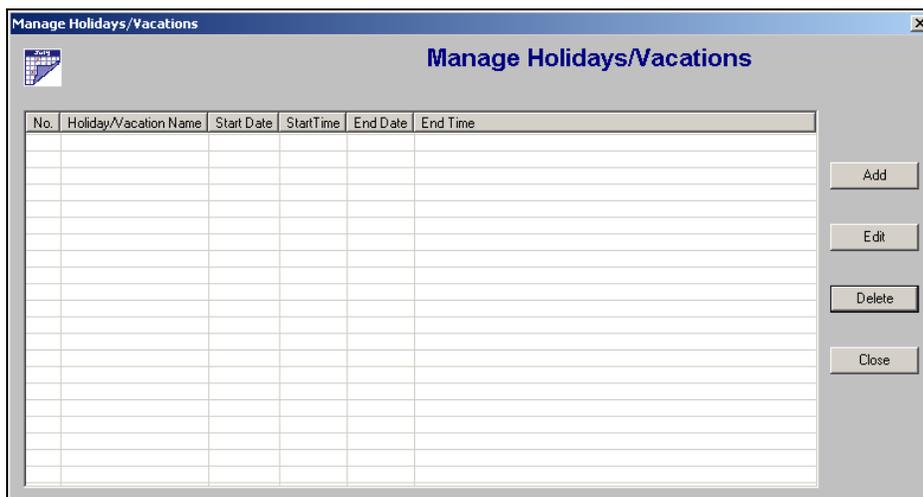
1. From the **Manage Holidays/Vacations** window, select the holiday or vacation you want to delete by clicking it.
2. Click **Delete**. The software prompts you for confirmation.



3. Click **Yes** to confirm. The software alerts you that the holiday or vacation has been deleted from the database.



4. Click **OK**. The software returns to the updated **Manage Holidays/Vacations** window.



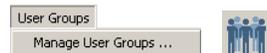
Note: You should update your locks to reflect modified holidays/vacations by programming the M-Unit and uploading the information to the locks. For more information, refer to *M-Unit Handheld PDA* in Chapter 5, **Programming and Auditing Locks**.

Managing User Groups

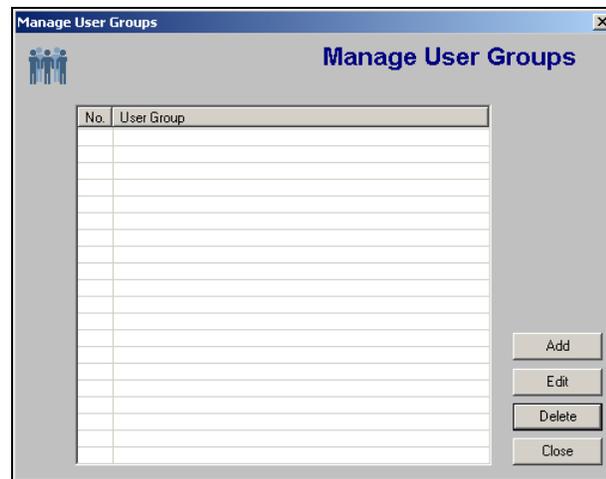
In the E-Plex Advanced ACS software, you can group similar users into User Groups like departments. For example, you may have a group of users who can be assigned to a user group called Office-Staff. The user group assignment in the software is strictly for operator convenience and does not have any other effect in the functionality of the system.

Note: You can assign any number of user groups in the software.

To manage user groups, select **Manage User Groups** from the **User Groups** menu, or click the **Manage User Groups** button.



The software displays the **Manage User Groups** window.

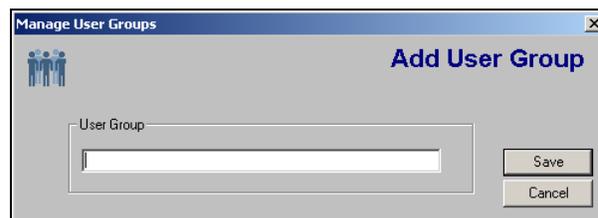


From this window, you can add, edit, or delete user groups.

Adding a User Group

Complete the following steps to add a user group.

1. From the **Manage User Groups** window, click **Add**. The software displays the **Add User Group** window.



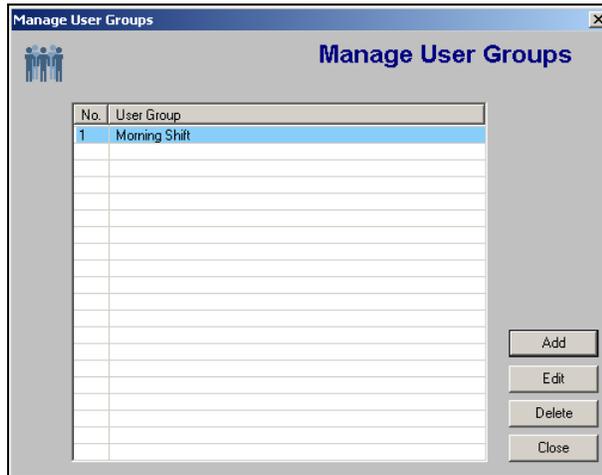
2. In the **User Group** field, type the name of the user group you are adding.

Note: The **User Group** name can be a maximum of 20 characters and may include special characters and spaces.

3. Click **Save**. The software alerts you that the user group was added to the database.



4. Click **OK**. The software displays the new user group in the **Manage User Groups** window.

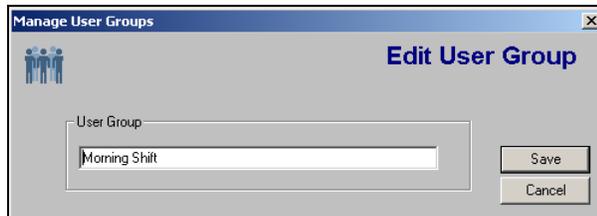


Note: You can add additional user groups at any time.

Editing a User Group

Complete the following steps to edit a user group.

1. From the **Manage User Groups** window, select a user group to edit by clicking it.
2. Click **Edit**. The software displays the **Edit User Group** window.



3. In the **User Group** field, change the name of the user group.

Note: The **User Group** name can be a maximum of 20 characters and may include special characters and spaces.

4. Click **Save**. The software alerts you that the database has been updated.



Note: You should update your locks to reflect modified user groups by programming the M-Unit and uploading the information to the locks. For more information, refer to **M-Unit Handheld PDA** in Chapter 5, **Programming and Auditing Locks**.

Managing Users

In the E-Plex Advanced ACS software, you can add and maintain Users, and if they are E-Plex 5700 lock users, you can additionally assign their associated Prox Cards. You can add new users, assign a Prox Card to each user, change user information, or delete existing users and the Prox Cards assigned to them.

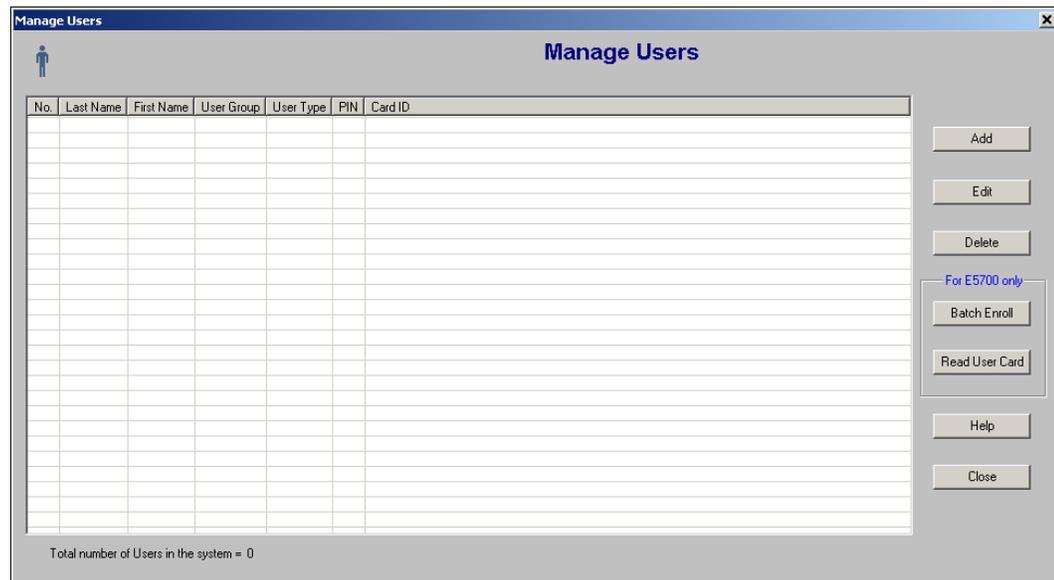
The E-Plex Advanced ACS software allows you to manage users from the **Manage Users** menu.

Note: You can define a maximum of 3,000 users in the lock, but any number of them in the software.

To manage users, from the **Users** menu select **Manage Users**, or click the **Manage Users** button.



The software displays the **Manage Users** window:



From this window, you can add, edit, or delete users. Additionally, for E-Plex 5700 lock users only, you can batch-enroll users and read user cards using the Prox Card Reader/Enroller.

Adding a User

If you are using the Prox Card Reader/Enroller to add E-Plex 5700 users, ensure that it is properly connected to the PC before beginning this process.

Note: A red light indicates that the enroller is ready to read a card. A green flash means that it successfully read a card when you flash a card close to it.

Complete the following steps to add a user:

1. From the **Manage Users** window, click **Add**. The software displays the **Add User** window.

If a Prox Card Reader is connected:

If a Prox Card Reader is not connected:

2. From the **User Group** drop-down list, select a user group.
3. In the **Last Name** field, type the last name of the user.
4. In the **First Name** field, type the first name of the user.
5. From the **User Type** drop-down list, select a user type. Refer to **Lock User Personnel Classifications** in Chapter 1, **About the E-Plex Advanced ACS**.

Note: The **User Type** field defaults to Access User.

6. In the **User PIN** field, the User PIN for this user will be automatically generated by the software, which can be overridden by the Operator to any other PIN of the same length.
7. For E-Plex 5700 lock users only, select the **Assign Prox Card** check box. For E-Plex 5200 lock users, proceed to step 10.
8. Click the **Card ID** field to place the cursor there, so that the Prox Reader is ready to read the Prox Card ID of the user.

Note: The **Card ID** field is only available if you select the **Assign Prox Card** check box.

Caution: The **Card ID** field should not be entered manually. It must be read from the Prox Card via the Prox Reader/Enroller attached to the PC. For manual card ID entry, you must do it under the **Batch Enroll** sub-menu selection.

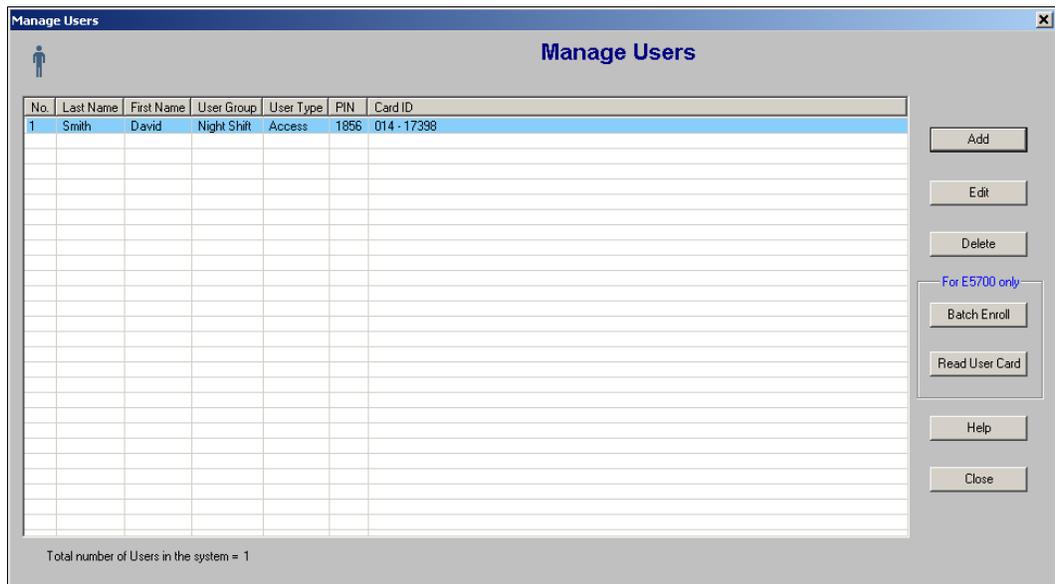
- Place a flat side of the Prox Card on or in close proximity to the Prox Reader.
The **Card ID** field will display the card ID, and the Prox Reader will display a green light once the card is successfully read.

Note: Be careful to present the Prox Card quickly so that it is read only once.

- Click **Save**. The software alerts you that the user was enrolled.



- Click **OK**. The software displays the new user in the **Manage Users** window:

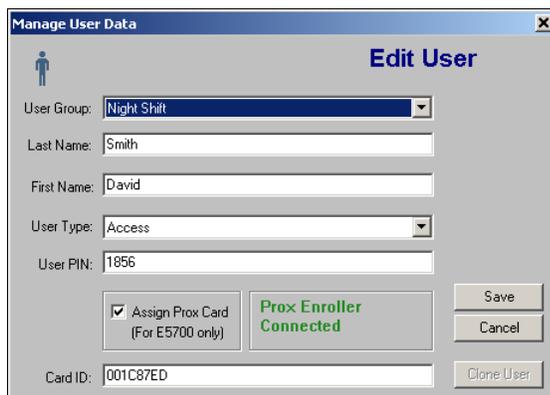


Editing a User

Complete the following steps to edit a user:

- From the **Manage Users** window, select a user to edit by clicking it.
- Click **Edit**. The software displays the **Edit User** window:

If a Prox Card Reader is connected:



If a Prox Card Reader is not connected:

3. From the **User Group** drop-down list, select a user group.
4. In the **Last Name** field, re-type the last name of the user.
5. In the **First Name** field, re-type the first name of the user.
6. From the **User Type** drop-down list, change the user type. Refer to **Lock User Personnel Classifications** in Chapter 1, **About the E-Plex Advanced ACS**.
7. In the **User PIN** field, re-type a four- to eight-digit PIN for the user.

Note: A User PIN is pre-designated by the software based on your System Settings. You may override the assigned PIN and enter a number of your choice.

8. For E-Plex 5700 lock users only, select the **Assign Prox Card** check box. For E-Plex 5200 lock users, proceed to step 11.
9. Click the **Card ID** field to place the cursor there, so that the Prox Reader is ready to read the Prox Card ID of the user.

Note: The **Card ID** field is only available if you select the **Assign Prox Card** check box for the E-Plex 5700 in the field.

Caution: The **Card ID** field should not be entered manually. It must be read from the Prox Card via the Prox Reader/Enroller attached to the PC. For manual card ID entry, you must do it under the **Batch Enroll** sub-menu selection.

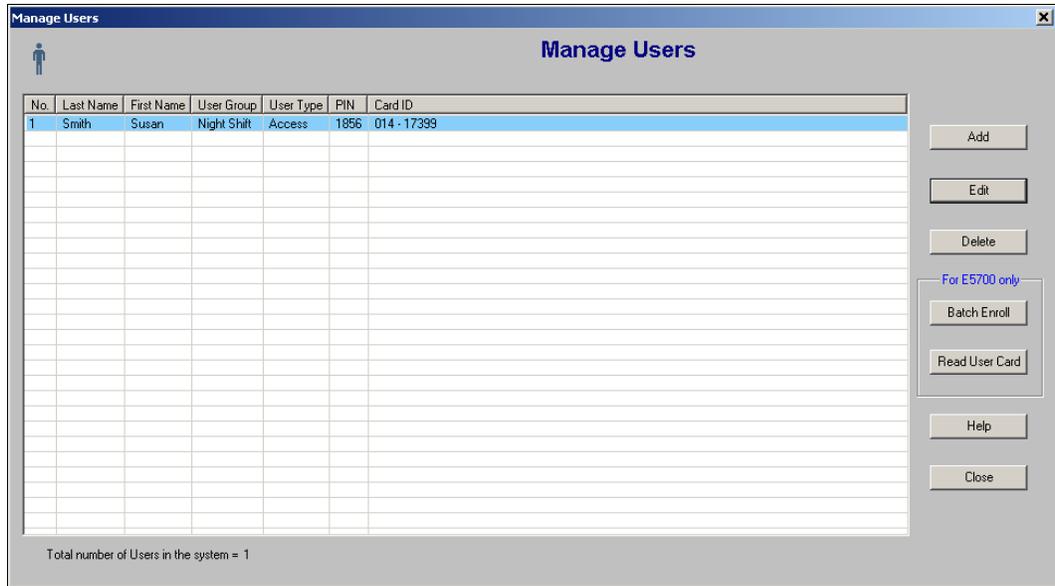
10. Place a flat side of the Prox Card on or in close proximity to the Prox Reader.
The **Card ID** field will display the card ID, and the Prox Reader will display a green light once the card is successfully read.

Note: Be careful to present the Prox Card quickly so that it is read only once.

11. Click **Save**. If no door groups were affected, the software alerts you.



12. Click **OK**. The software displays the edited user in the **Manage Users** window:

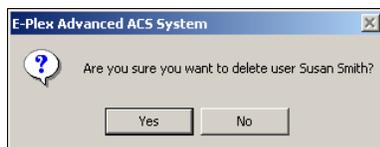


Note: You should update your locks to reflect modified users by programming the M-Unit and uploading the information to the locks. For more information, refer to **M-Unit Handheld PDA** in Chapter 5, **Programming and Auditing Locks**.

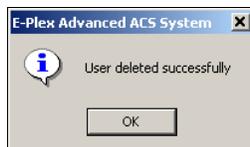
Deleting a User

Complete the following steps to delete a user:

1. From the **Manage Users** window, select a user to delete by clicking it.
2. Click **Delete**. The software prompts you for confirmation:



3. Click **Yes**. The software alerts you that the user has been deleted from the database:



4. Click **OK**. The software alerts you if no door groups were affected:



Note: The facility code is a three-digit number from 000-255 that is usually not printed on the card for security reasons. If you scan a card from the group of cards that you want to batch enroll under the **Read User Card** sub-menu, you can read the facility code as the first three digits of the card ID.

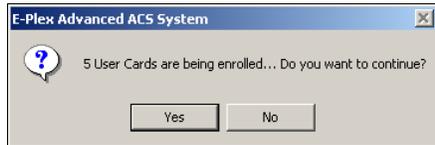
4. In the **Starting Card No.** field, type the starting card number of the group of cards you want to enroll.

Note: The starting card number is a five-digit number from 00000-65535. The combined value is the actual Prox Card ID.

5. In the **Ending Card No.** field, type the ending card number of the user's Prox Card.

Note: The ending card number is a five-digit number from 00000-65535. The combined value is the actual Prox Card ID. If you are only enrolling one card, you do not have to enter the ending number.

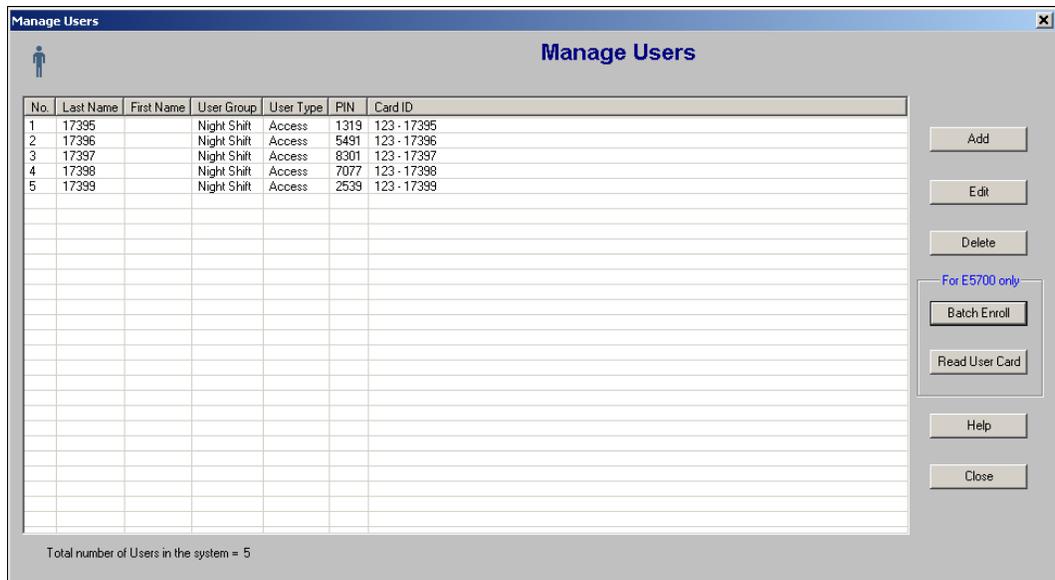
6. Click **Save**. The software prompts you for confirmation:



7. Click **Yes**. The software alerts you that the group Prox Card IDs have been enrolled:



8. Click **OK**. The software returns to the updated **Manage Users** window:

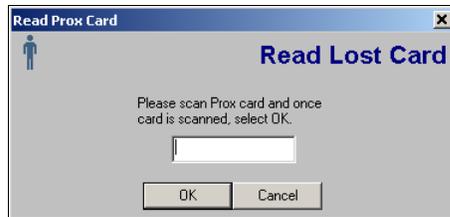


Note: You can batch enroll users at any time.

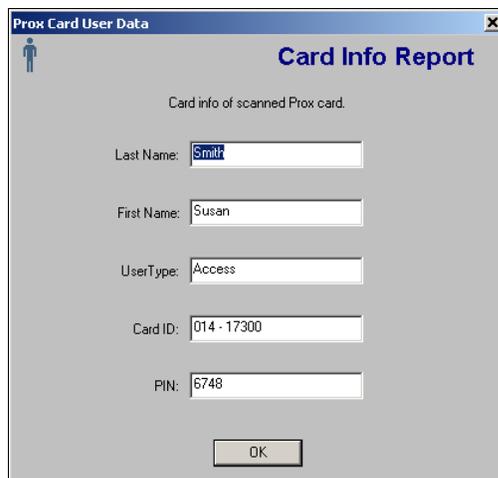
Reading a User Card (E-Plex 5700 Only)

Complete the following steps to read a user card:

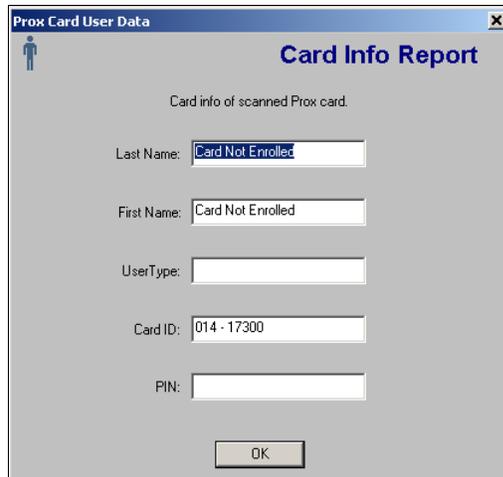
1. From the **Manage Users** window, click **Read User Card**. The software displays the **Read Lost Card** window:



2. Scan the Prox Card using the Prox Reader.
3. Click **OK**. The software displays the **Card Info Report** window:

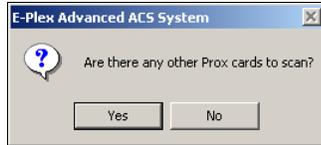


If the user of this card is not present in the system, it will display the Card Info Report window with a “Card Not Enrolled” message:



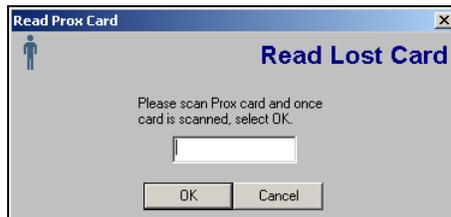
4. Once you determine whom the Prox Card belongs to, click **OK**.

- The software prompts you for additional Prox Card searches.



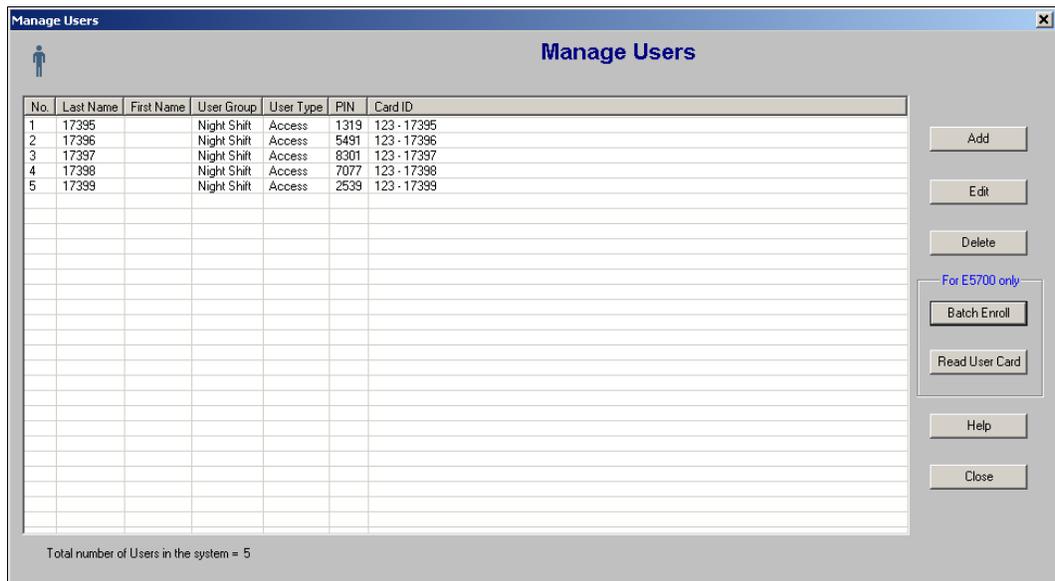
- Click **Yes** to scan another card or **No** to return to the **Manage Users** window.

If you click **Yes**, the software displays the **Read Lost Card** window to perform another search:



If you click **No**, the software returns to the **Manage Users** window.

- Click **No**. The software returns to the **Manage Users** window:



From this window, you can add, edit, or delete users.

Managing Doors

In the E-Plex Advanced ACS software, Doors are literally the physical doors at your site where either the E-Plex 5200 (PIN only) or the E-Plex 5700 (PIN & Prox) locks are installed. You can define new doors, maintain doors, and delete existing doors.

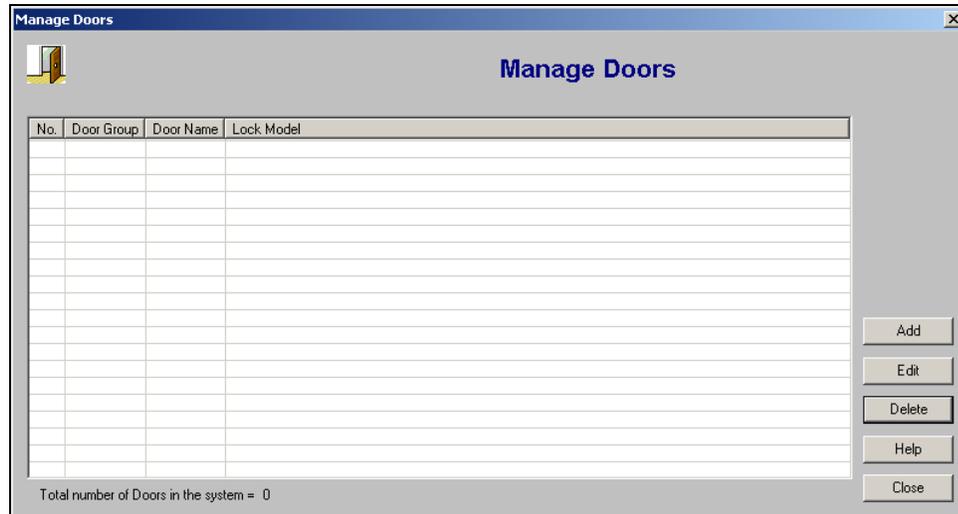
The E-Plex Advanced ACS software allows you to manage doors through the **Manage Doors** menu.

Note: You can define a maximum of 10,000 doors in the software.

To manage doors, from the **Door** menu select **Manage Doors**, or click the **Manage Doors** button.



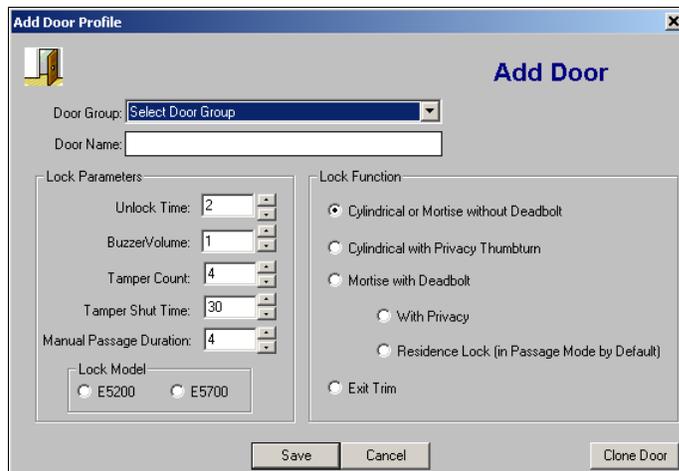
The software displays the **Manage Doors** window:



Adding a Door

Complete the following steps to add a door.

1. From the **Manage Doors** window, click **Add**. The software displays the **Add Door** window:



2. From the **Door Group** drop-down list, select a door group.
3. In the **Door Name** field, type a name for the door.

Note: A door name can be a maximum of 20 alphanumeric characters.

4. From the **Unlock Time** field, select an unlock time by using the Up and Down arrows.

Note: The **Unlock Time** field values range between two and 20 seconds; the default is two seconds.

Note: You can add additional doors at any time.

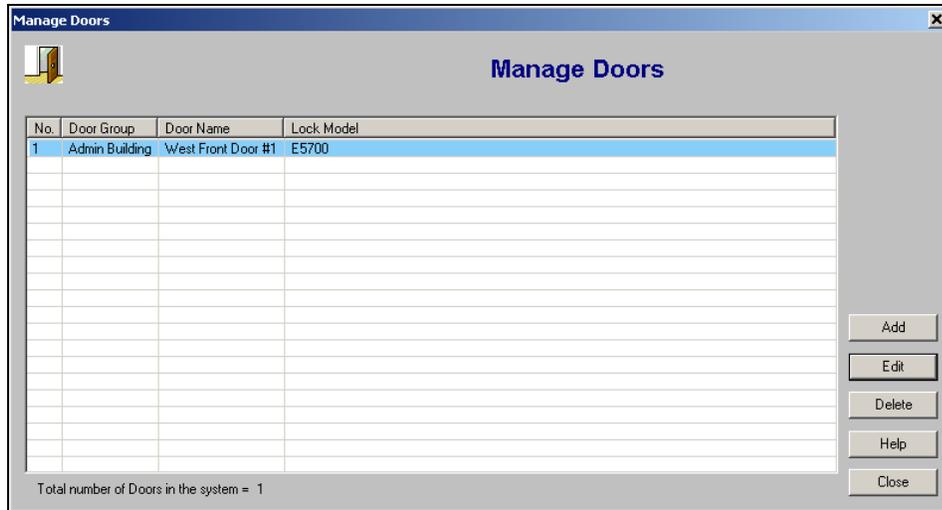
Editing a Door

Complete the following steps to edit a door:

1. From the **Manage Doors** window, select a door to edit by clicking it.
2. Click **Edit**. The software displays the **Edit Door** window.

3. From the **Door Group** drop-down list, change the door group.
4. In the **Door Name** field, re-type the name of the door.
5. From the **Unlock Time** field, change the unlock time by using the Up and Down arrows.
6. From the **Buzzer Volume** field, change the volume level by using the Up and Down arrows.
7. From the **Tamper Count** field, change the tamper count value by using the Up and Down arrows.
8. From the **Tamper Shut Time** field, change the tamper shut time value by using the Up and Down arrows.
9. Select a **Lock Model** by clicking **E5200** or **E5700**.
10. Change the **Lock Function** by selecting one of the following options:
 - Cylindrical or Mortise without Deadbolt
 - Cylindrical with Privacy Thumbturn
 - Mortise with Deadbolt
 - With Privacy
 - Residence Lock (in Passage Mode by Default)
 - Exit Trim
11. Click **Save**. The software prompts you for confirmation:

12. Click **Yes**. The software displays the edited **Manage Doors** window:

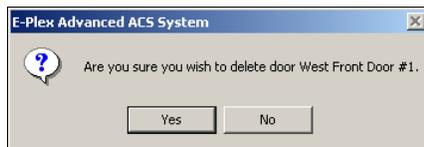


Note: You should update your locks to reflect modified door groups by programming the M-Unit and uploading the information to the locks. For more information, refer to **M-Unit Handheld PDA** in Chapter 5, **Programming and Auditing Locks**.

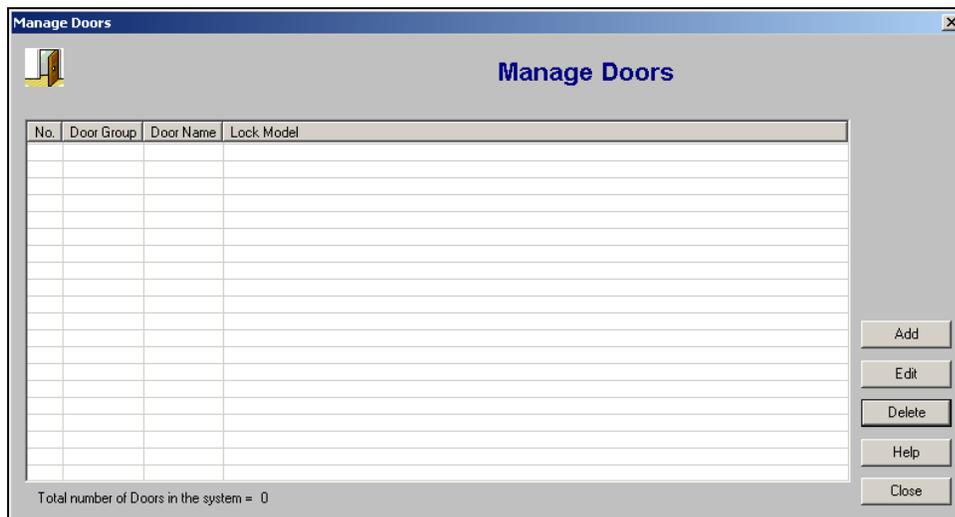
Deleting a Door

Complete the following steps to delete a door:

1. From the **Manage Doors** window, select a door to delete by clicking it.
2. Click **Delete**. The software prompts you for confirmation:



3. Click **Yes**. The software displays the updated **Manage Doors** window, where the locks need to be re-programmed (if any):



Note: You should update your locks to reflect modified door groups by programming the M-Unit and uploading the information to the locks. For more information, refer to **M-Unit Handheld PDA** in Chapter 5, **Programming and Auditing Locks**.

Access Assignment

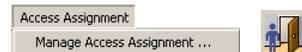
The Access Assignment function allows you to assign each door—one at a time—its access, granting door and user configuration.

From this menu, you must select a door and assign the door schedules, holidays/vacations, and the users who should have access to this door. When you assign the access schedules to the door, you must also specify if the door schedule requires PIN access, Prox Card access (for E-Plex 5700 only), or dual credential access (for E-Plex 5700 only). Also, for each user type, you must also assign a schedule and optionally assign any one or more of the following three privileges:

- Override holidays/vacations
- Override deadbolt
- First user passage entry

Finally, you can optionally enable the Passage Mode function (by default, it is disabled). After this process, the lock configuration data is set up and prepared to be HotSynced to the M-Unit and then uploaded to the door/lock.

To manage door access assignment, select **Manage Access Assignment** from the **Access Assignment** menu, or click the **Manage Access Assignment** button.



The software displays the **Manage Access Assignment** window:

From this window, you can manage door access assignment, including:

- Assigning access schedules
- Assigning holidays/vacations
- Assigning users

6. Select an **Access Type** from one of the following options:

- PIN (for E-Plex 5200 or E-Plex 5700)
- Card (for E-Plex 5700 only)
- PIN + Card (for E-Plex 5700 only)

Note: If the lock is an E-Plex 5200, the only option available for the access type is **PIN**. If the lock is an E-Plex 5700, all three options are available for the access type.

7. If you enabled the Passage Mode from the **Manage Access Assignment** window, select a **Passage Mode Type** from the following options:

- Manual Passage Only

Note: The available values for manual passage range between one and 24; the default is four hours. Click the Up and Down arrows to select a value.

- Auto Passage
- First Authorized User Passage

8. Click **Assign**. The software displays the updated **Assign Schedule to Door for Access** window:

Define Access Schedules

Assign Schedules to Door for Access

Door Group: Admin Building Door Name: West Front Door #1
Lock Model: **E5700**

Door Access Schedules												
No.	Schedule Name	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Start	End	Access Type	Passage Mode Type
1	Normal Weekday								8:00 AM	5:00 PM	PIN and Card	Manual Passage

Select Schedule Name:

Access Type: PIN, Card, PIN + Card

Passage Mode Type: Manual Passage Only, Auto Passage, First Authorized User Passage

Buttons: Assign, Unassign, Save, Cancel

9. To remove an assigned access schedule, click an already assigned schedule name.

10. Click **Unassign**. The software prompts you for confirmation.

E-Plex Advanced ACS System

⚠ The access schedule Normal Weekday will be deleted from the door. Is this desirable?

Buttons: Yes, No

11. Click **Yes** to confirm removal or **No** to cancel removal.

22. From the **Manage Access Assignment** window, click **Users**. The **Assign Users to Door for Access** window displays:

Define Access User List

Assign Users to Door For Access

Door Group: Admin Building Door Name: West Front Door #1
Lock Model: E5700

To assign Schedules & Privileges to a User, select a User and double click

Last Name	First Name	User Group	User Type
Davis	Ian	Night Shift	Guest
Lito	Jeremy	Night Shift	Service
Slater	Tom	Night Shift	MUnit
Thomas	Rita	Night Shift	Manager
Weathersby	Jan	Night Shift	Access

Last Name	First Name	User Group	User Type	Schedules	Privileges
-----------	------------	------------	-----------	-----------	------------

Total Users assigned to this Door: 0

Save Cancel

23. Select a user by double-clicking anywhere on the user's row. To select multiple users, hold the **Ctrl** key and click the users you wish to select.
24. Click the green arrow to transfer the selected users to the fields on the right:



The software displays the users in the fields to the right:

Define Access User List

Assign Users to Door For Access

Door Group: Admin Building Door Name: West Front Door #1
Lock Model: E5700

To assign Schedules & Privileges to a User, select a User and double click

Last Name	First Name	User Group	User Type	Schedules	Privileges
Davis	Ian	Night Shift	Guest	None	None
Lilo	Jeremy	Night Shift	Service	None	None
Slater	Tom	Night Shift	MUnit	None	None
Thomas	Rita	Night Shift	Manager	None	None
Weathersby	Jan	Night Shift	Access	None	None

Total Users assigned to this Door: 5

Save Cancel

25. If you need to remove a user from the fields on the right, select the user and double-click the red arrow to return the user to the fields on the left:



26. Double-click a user to assign Access Schedules and Privileges to a user. The software displays the **Assign Access Schedules and Privileges** screen for the type of user you selected:

- Manager
- Access
- Guest
- Service
- M-Unit

You can assign any available Access Schedules or any (or all) of the following three Privileges to all five types of users:

- Override holidays/vacations
- Override deadbolt
- First entry passage

Manager User

Assign Schedules and Privileges to User:

User: Rita Thomas

Assign Access Schedules and Privileges

Select available Schedules for User:

Assign	No.	Schedule Name
<input checked="" type="checkbox"/>	1	Always
<input type="checkbox"/>	2	Normal Weekday
<input type="checkbox"/>	3	Normal Weekend
<input type="checkbox"/>	4	
<input type="checkbox"/>	5	
<input type="checkbox"/>	6	
<input type="checkbox"/>	7	
<input type="checkbox"/>	8	
<input type="checkbox"/>	9	
<input type="checkbox"/>	10	
<input type="checkbox"/>	11	
<input type="checkbox"/>	12	
<input type="checkbox"/>	13	
<input type="checkbox"/>	14	
<input type="checkbox"/>	15	
<input type="checkbox"/>	16	

Select available Privileges for User:

Assign	Privileges
<input checked="" type="checkbox"/>	Override Holidays/Vacations
<input type="checkbox"/>	Override Deadbolt
<input checked="" type="checkbox"/>	First Entry Passage

Guest User Management
 Select up to 365 Days Access with Start Date/Time:
 Start Date: 8/24/2005
 Start Time: 8:00 AM
 End Date: 8/24/2006
 End Time: 8:00 AM

Service User Management
 Select up to 24 Hours Access from first Activation:
 Grant Access from one time or from 1 Hour to 24 Hours: 0

Save

Access User

Assign Schedules and Privileges to User:

User: Jan Weathersby

Assign Access Schedules and Privileges

Select available Schedules for User:

Assign	No.	Schedule Name
<input checked="" type="checkbox"/>	1	Always
<input type="checkbox"/>	2	Normal Weekday
<input type="checkbox"/>	3	Normal Weekend
<input type="checkbox"/>	4	
<input type="checkbox"/>	5	
<input type="checkbox"/>	6	
<input type="checkbox"/>	7	
<input type="checkbox"/>	8	
<input type="checkbox"/>	9	
<input type="checkbox"/>	10	
<input type="checkbox"/>	11	
<input type="checkbox"/>	12	
<input type="checkbox"/>	13	
<input type="checkbox"/>	14	
<input type="checkbox"/>	15	
<input type="checkbox"/>	16	

Select available Privileges for User:

Assign	Privileges
<input type="checkbox"/>	Override Holidays/Vacations
<input type="checkbox"/>	Override Deadbolt
<input checked="" type="checkbox"/>	First Entry Passage

Guest User Management
 Select up to 365 Days Access with Start Date/Time:
 Start Date: 8/24/2005
 Start Time: 8:00 AM
 End Date: 8/24/2006
 End Time: 8:00 AM

Service User Management
 Select up to 24 Hours Access from first Activation:
 Grant Access from one time or from 1 Hour to 24 Hours: 0

Save

Guest User

Assign Schedules and Privileges to User:

User: Ian Davis

Assign Access Schedules and Privileges

Select available Schedules for User:

Assign	No.	Schedule Name
<input checked="" type="checkbox"/>	1	Always
<input type="checkbox"/>	2	Normal Weekday
<input type="checkbox"/>	3	Normal Weekend
<input type="checkbox"/>	4	
<input type="checkbox"/>	5	
<input type="checkbox"/>	6	
<input type="checkbox"/>	7	
<input type="checkbox"/>	8	
<input type="checkbox"/>	9	
<input type="checkbox"/>	10	
<input type="checkbox"/>	11	
<input type="checkbox"/>	12	
<input type="checkbox"/>	13	
<input type="checkbox"/>	14	
<input type="checkbox"/>	15	
<input type="checkbox"/>	16	

Select available Privileges for User:

Assign	Privileges
<input checked="" type="checkbox"/>	Override Holidays/Vacations
<input type="checkbox"/>	Override Deadbolt
<input type="checkbox"/>	First Entry Passage

Guest User Management
Select up to 365 Days Access with Start Date/Time:

Start Date: 8/24/2005
Start Time: 8:00 AM
End Date: 8/24/2006
End Time: 8:00 AM

Service User Management
Select up to 24 Hours Access from first Activation:

Grant Access from one time or from 1 Hour to 24 Hours: 0

Save

For Guest Users, you must enter a **Start Date**, **Start Time**, **End Date**, and **End Time** for the user's access.

Service User

Assign Schedules and Privileges to User:

User: Jeremy Lito

Assign Access Schedules and Privileges

Select available Schedules for User:

Assign	No.	Schedule Name
<input type="checkbox"/>	1	Always
<input type="checkbox"/>	2	Normal Weekday
<input type="checkbox"/>	3	Normal Weekend
<input type="checkbox"/>	4	
<input type="checkbox"/>	5	
<input type="checkbox"/>	6	
<input type="checkbox"/>	7	
<input type="checkbox"/>	8	
<input type="checkbox"/>	9	
<input type="checkbox"/>	10	
<input type="checkbox"/>	11	
<input type="checkbox"/>	12	
<input type="checkbox"/>	13	
<input type="checkbox"/>	14	
<input type="checkbox"/>	15	
<input type="checkbox"/>	16	

Select available Privileges for User:

Assign	Privileges
<input checked="" type="checkbox"/>	Override Holidays/Vacations
<input checked="" type="checkbox"/>	Override Deadbolt
<input type="checkbox"/>	First Entry Passage

Guest User Management
Select up to 365 Days Access with Start Date/Time:

Start Date: 8/24/2005
Start Time: 8:00 AM
End Date: 8/24/2006
End Time: 8:00 AM

Service User Management
Select up to 24 Hours Access from first Activation:

Grant Access from one time or from 1 Hour to 24 Hours: 24

Save

For Service Users, you must assign between one and 24 hours of access to the door. Service Users will have PIN-only access (both in E-Plex 5200 and E-Plex 5700 locks). The access begins when a Service User enters the valid PIN at any time ("Always" access) and ends after the programmed time ends (one to 24 hours). You can also assign zero (0) hours, which means that the Service User access is for one time ("one shot") only.

M-Unit User

Assign Schedules and Privileges to User:

User: Tom Slater

Assign Access Schedules and Privileges

Select available Schedules for User:

Assign	No.	Schedule Name
<input checked="" type="checkbox"/>	1	Always
<input type="checkbox"/>	2	Normal Weekday
<input type="checkbox"/>	3	Normal Weekend
<input type="checkbox"/>	4	
<input type="checkbox"/>	5	
<input type="checkbox"/>	6	
<input type="checkbox"/>	7	
<input type="checkbox"/>	8	
<input type="checkbox"/>	9	
<input type="checkbox"/>	10	
<input type="checkbox"/>	11	
<input type="checkbox"/>	12	
<input type="checkbox"/>	13	
<input type="checkbox"/>	14	
<input type="checkbox"/>	15	
<input type="checkbox"/>	16	

Select available Privileges for User:

Assign	Privileges
<input checked="" type="checkbox"/>	Override Holidays/Vacations
<input checked="" type="checkbox"/>	Override Deadbolt
<input type="checkbox"/>	First Entry Passage

Guest User Management

Select up to 365 Days Access with Start Date/Time:

Start Date: 8/24/2005

Start Time: 8:00 AM

End Date: 8/24/2006

End Time: 8:00 AM

Service User Management

Select up to 24 Hours Access from first Activation:

Grant Access from one time or from 1 Hour to 24 Hours: 0

Save

The M-Unit User is unique in that he or she does not have actual access to any door/lock, but can only program or audit locks using the M-Unit Palm PDA any time of the day.

27. When you have completed the fields of the **Assign Access Schedules and Privileges** window, click **Save**. The software returns to the **Assign Users to Door for Access** window.
28. Assign Access Schedules and Privileges to any other assigned users. When you are finished, click **Save**. The software returns to the **Manage Access Assignment** window.
29. Repeat steps 1–28 to administer additional doors.
30. Click **Save**. The software saves the information and closes the **Manage Access Assignment** window.

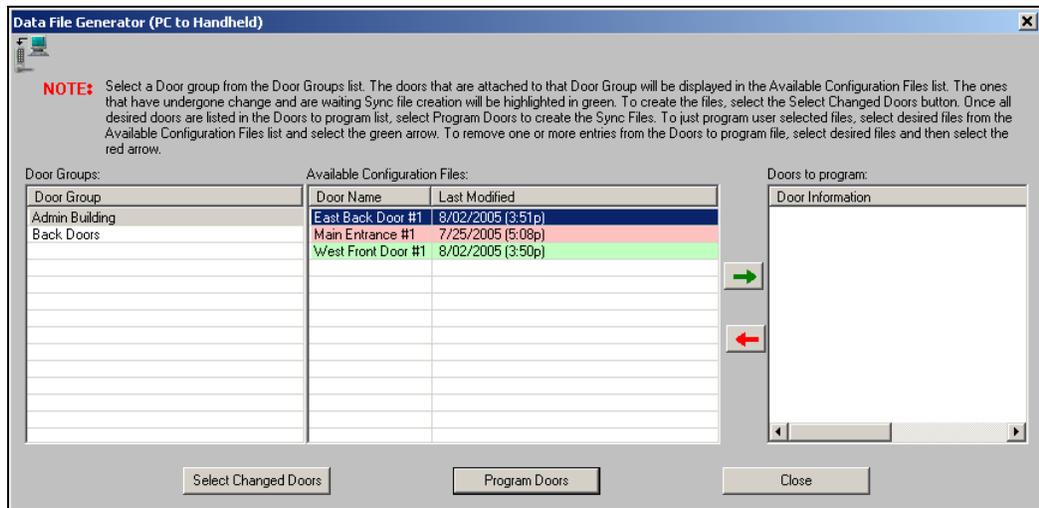
Programming Locks

As soon as any door in the system has been updated with new data, the **Program Locks** icon becomes active (“lights up”) to indicate the need to HotSync and upload new/changed data to a door/lock. If data have been prepared, it should be transferred (HotSynced) to the M-Unit so it can then be used to program the lock(s). The E-Plex Advanced ACS software allows you to program locks from the **Program** menu or its equivalent **Program** icon.

To program locks, from the **Program** menu, select **Program Lock**, or click the **Upload files are waiting to be created** button.



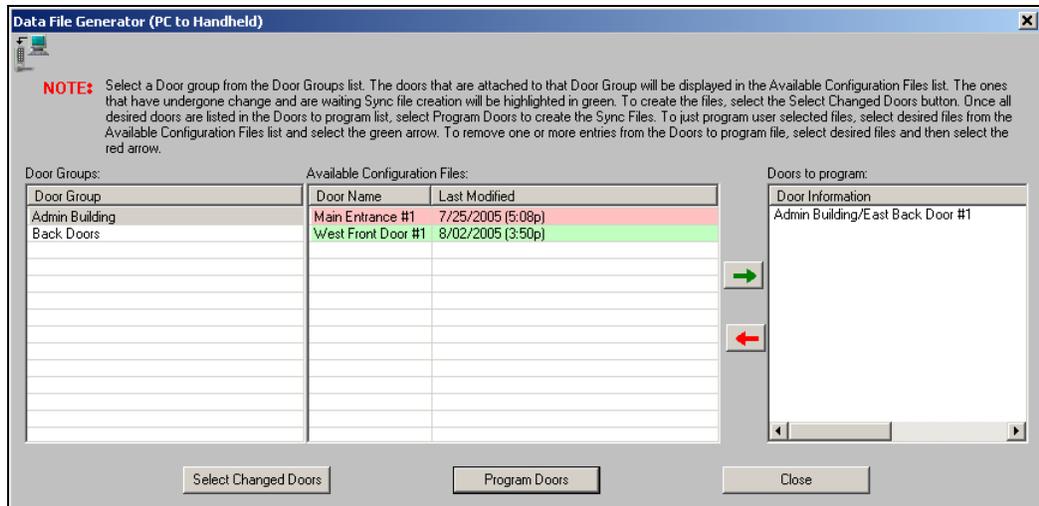
3. The software displays the door name in blue, indicating that it is available to be programmed:



4. Click the green arrow:



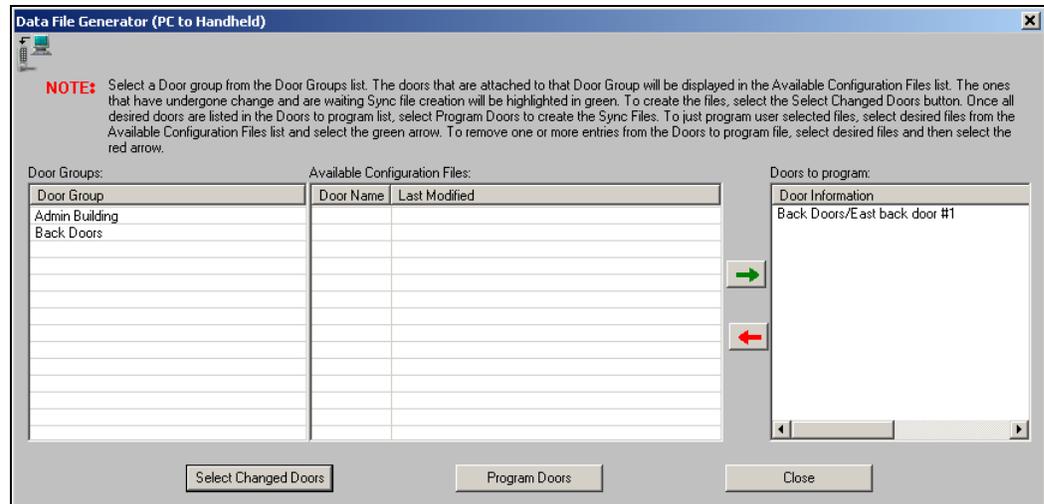
The software displays the door in the **Doors to program** area:



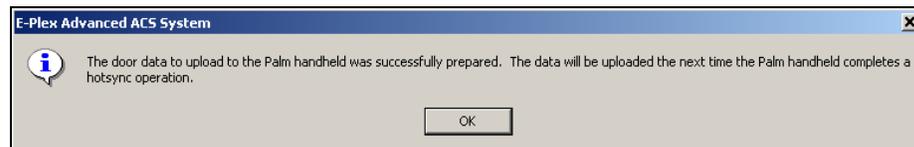
Proceed to step 6.

- If you click **Select Changed Doors**, the software displays the door(s) where the lock configuration data has been updated in the **Doors to program** area.

Note: The doors that have undergone change and are waiting for Sync File creation will be the only doors that will display in the **Doors to program** area.



- Repeat steps 3 and 4 to program additional doors.
- Click **Program Doors**. The software alerts you that the data will be uploaded to the Palm PDA (M-Unit):



- Click **OK**. The software closes the **Data File Generator** window.
- HotSync the M-Unit to program locks.

Auditing Locks

As soon as any door in the system has been audited and the M-Unit has been HotSynced, the **Audit Locks** icon becomes active (“lights up”).

To program locks, from the **Audit** menu, select **Audit Lock**, or click the **Upload files are waiting to be created** button.



The software displays the following prompt:



Refer to **Audits and User Tables from Downloaded Doors Report** in the **Reporting** section of this chapter to view audits.

Reporting

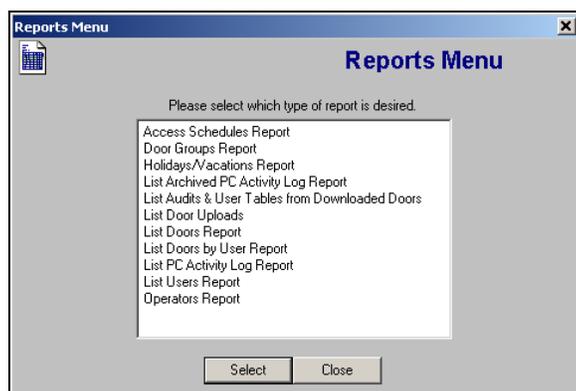
The Reports option can be used to view and report on the data that you have defined in the E-Plex Advanced ACS software and locks. It can also report on the data that you have uploaded to locks defined in the software. Once data have been transferred (HotSynced) from the lock to the PC, you can view and report on data from the lock. The E-Plex Advanced ACS software allows you to generate reports from the **Reports** menu.

Note: Within some of the reports, you will have the option to print cards containing user information. You can use Avery perforated card stock for Template 8871 to print the cards.

To access reports, from the **Reports** menu select **Reports**, or click the **Reports Menu** button:



The software displays the **Reports Menu** window:



From this window, you can select a report to view, print, or save.

Viewing Reports

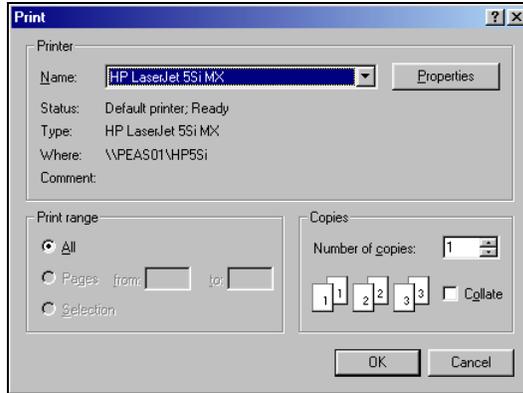
Complete the following steps to view reports.

1. From the **Reports Menu** window, select a report from the list by clicking it.
2. Click **Select**. The software displays the selected report.
3. Refer to the specific report below for further information.

Printing Reports

Complete the following steps to print a report:

1. From the report window, click **Print**. The software displays the **Print** window:



2. Click **OK**. The software sends the report to the printer and confirms that the report is complete:



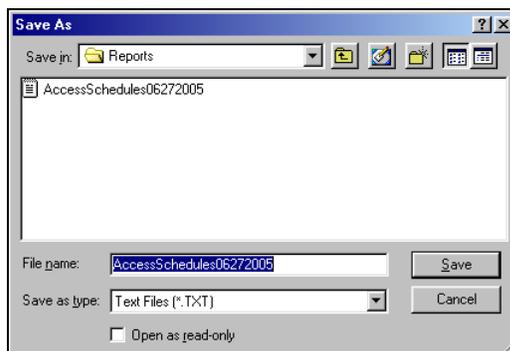
Note: On some printers, the printed column alignment of a report may not be correct. If this happens, save the file as a text file (the default folder to save Reports is **C:\Program Files\Kaba\EPIlexAdvancedACS\Reports**). Later, you can retrieve the saved report through Windows Explorer, and then print it to get a properly aligned report.

3. Click **OK** again. The software returns to the report window.
4. Click **Close**. The software returns to the **Reports Menu** window.

Saving a Report

Complete the following steps to save a report.

1. To save the report to a text file, click **Save**. The software displays the **Save As** window and prompts you for the file name:



2. Type a report name in the **File name** field.

Note: The software pre-designates a file report name. You can override the name and enter the file name of your choice.

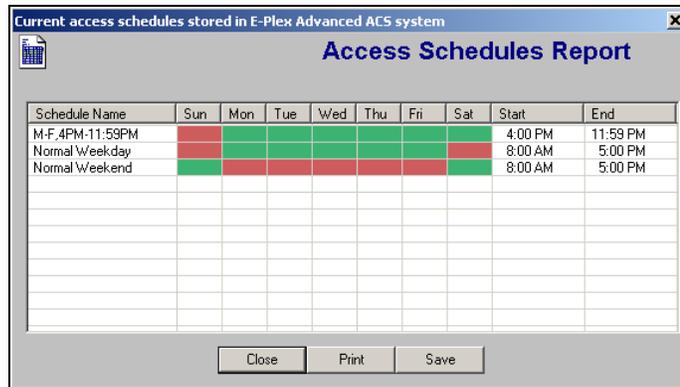
3. Click **Save**. The software confirms that the report has been saved:



4. Click **OK**. The software returns to the report window.
5. Click **Close**. The software returns to the **Reports Menu** window.

Access Schedules Report

The Access Schedules report will display all access Schedules that have been defined in the E-Plex Advanced ACS software.



From this window, you can print and save the Access Schedules report.

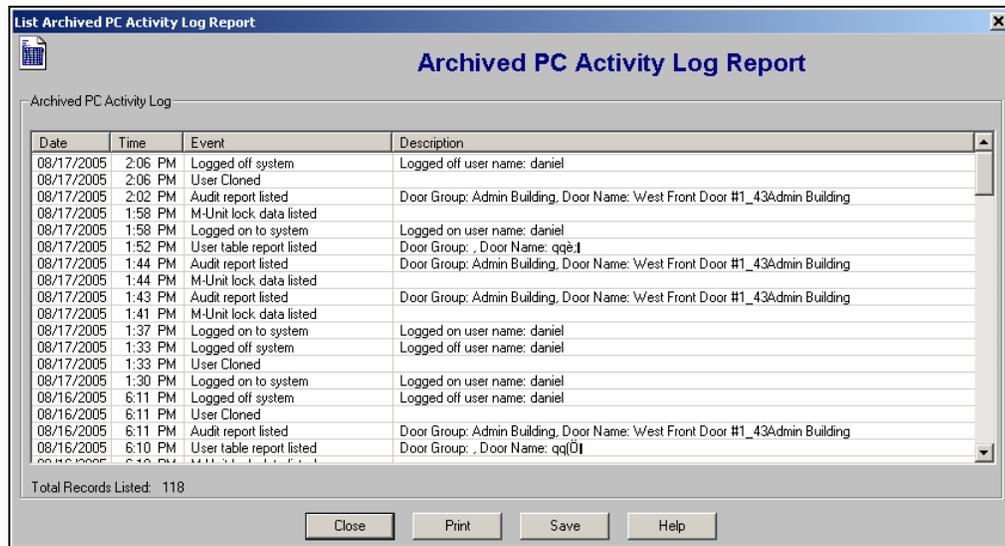
Door Groups Report

The Door Groups report displays all door groups that have been defined in the E-Plex Advanced ACS software:



From this window, you can print and save the Door Groups report.

Double-click the file name or select the file name and click **Open**. The software displays the **Archived PC Activity Log Report** window:



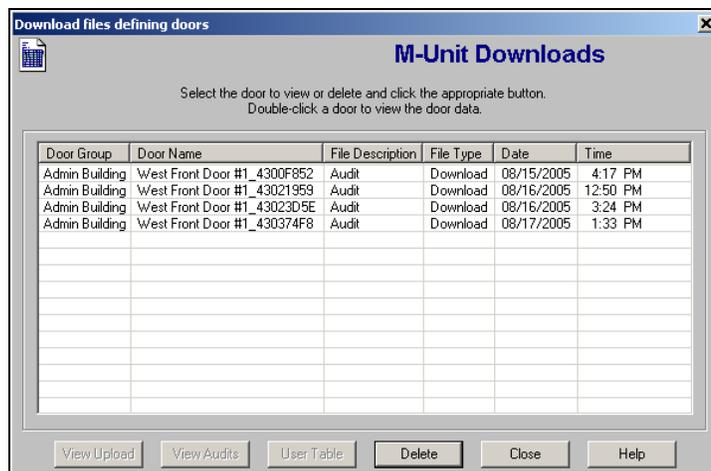
Note: Click **Help** at any time for online help.

From this window, you can print and save the Archived PC Activity Log Report.

Audits and User Tables from Downloaded Doors Report

The E-Plex 5200/E-Plex 5700 stores up to 30,000 audit events. The audit file is circular and the oldest record is overwritten by the most recent. A hard reset does not clear the audit trail.

The List Audits option allows you to view data that have been downloaded from a door to the PC through the M-Unit. The software displays a list of “download” data files, indicating the serial number of each lock from which a data file has been received.



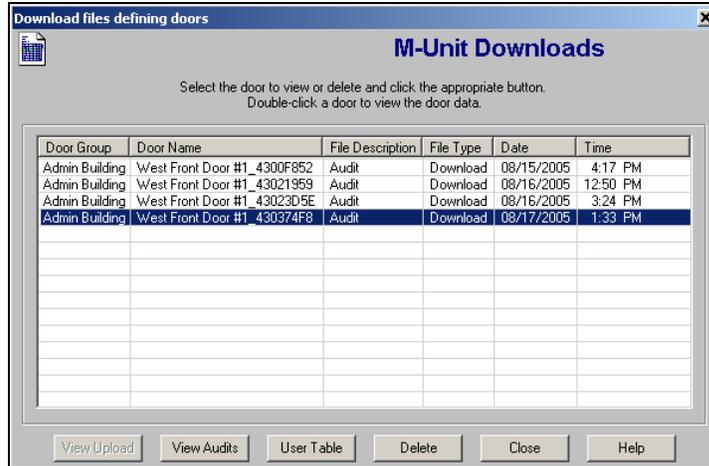
Note: Click **Help** at any time for online help.

From this window, you can view audits and access user tables and delete M-Unit downloads.

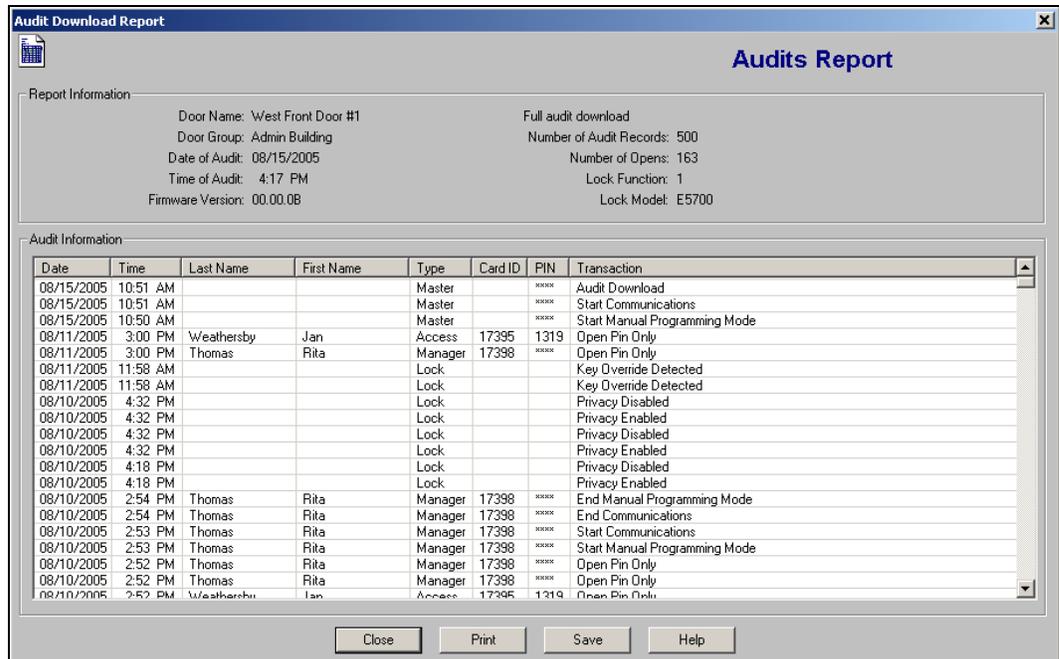
Viewing Audits

Complete the following steps to view audits:

1. From the **M-Unit Downloads** window, select a file from the list by clicking it:



2. Click **View Audits**. The software displays the **Audits Report** window.



Note: Click **Help** at any time for online help.

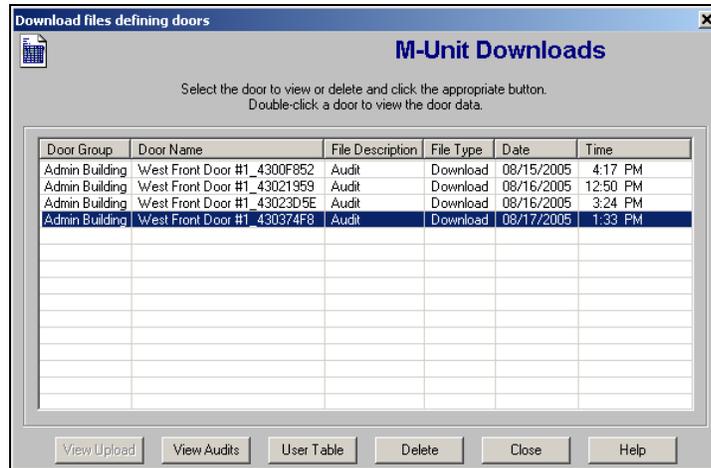
From this window, you can print or save the report.

3. When you are finished, click **Close**. The software returns to the **M-Unit Downloads** window.

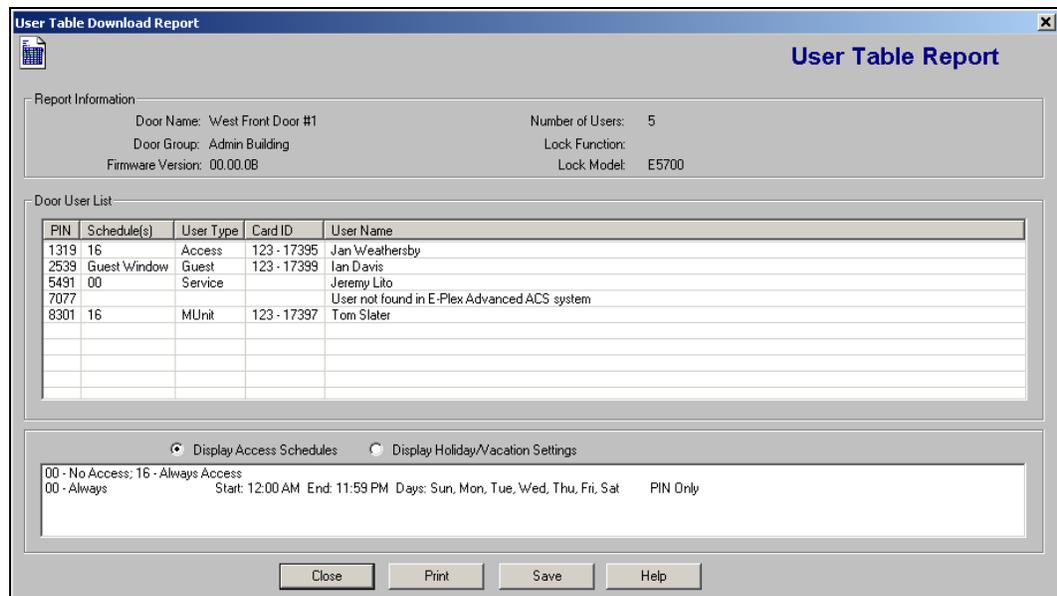
Accessing a User Table

Complete the following steps to access a user table:

1. From the **M-Unit Downloads** window, select a file from the list by clicking it:



2. Click **User Table**. The software displays the **User Table Report** window.



Note: Click **Help** at any time for online help.

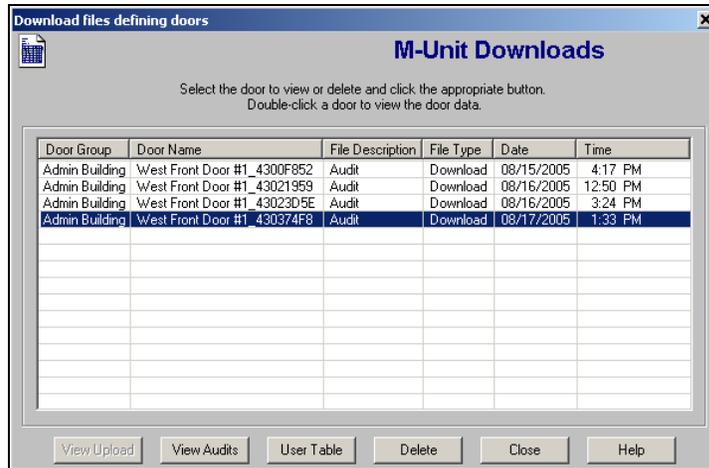
From this window, you can display access schedules, display holiday/vacation settings, and print or save the report.

3. Select the **Display Access Schedules** option to view access schedules, or select the **Display Holiday/Vacation Settings** option to view holiday/vacation settings.
4. When you are finished, click **Close**. The software returns to the **M-Unit Downloads** window.

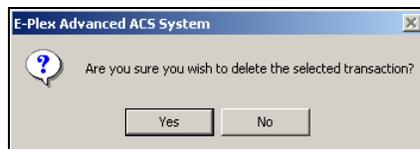
Deleting an Audit

Complete the following steps to delete an audit:

1. From the **M-Unit Downloads** window, select a file from the list by clicking it:



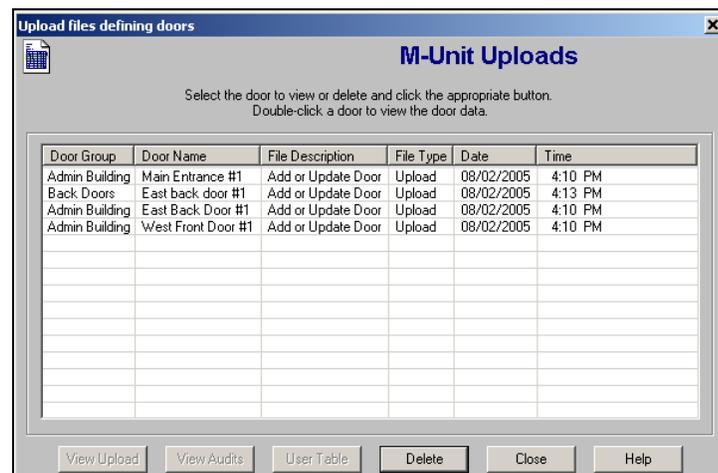
2. Click **Delete**. The software prompts you for confirmation:



3. Click **Yes**. The system deletes the door upload and returns to the **M-Unit Uploads** window.

List Door Uploads (M-Unit Uploads) Report

The List Door Uploads report allows you to view any data that have been prepared using the E-Plex Advanced ACS software for upload to the door (i.e., program the lock) via the M-Unit. The software displays a list of prepared “upload” data files. You can view the data for each door to ensure its accuracy before transferring it to the M-Unit via the HotSync operation.



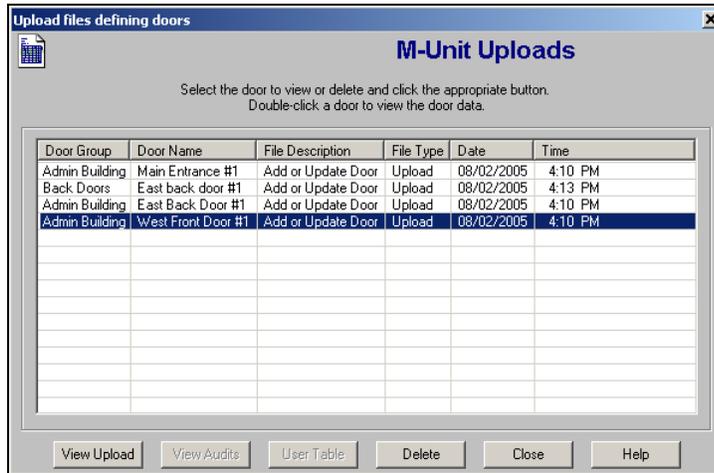
Note: Click **Help** at any time for online help.

From this window, you can view uploads and audits, access user tables, and delete M-Unit uploads.

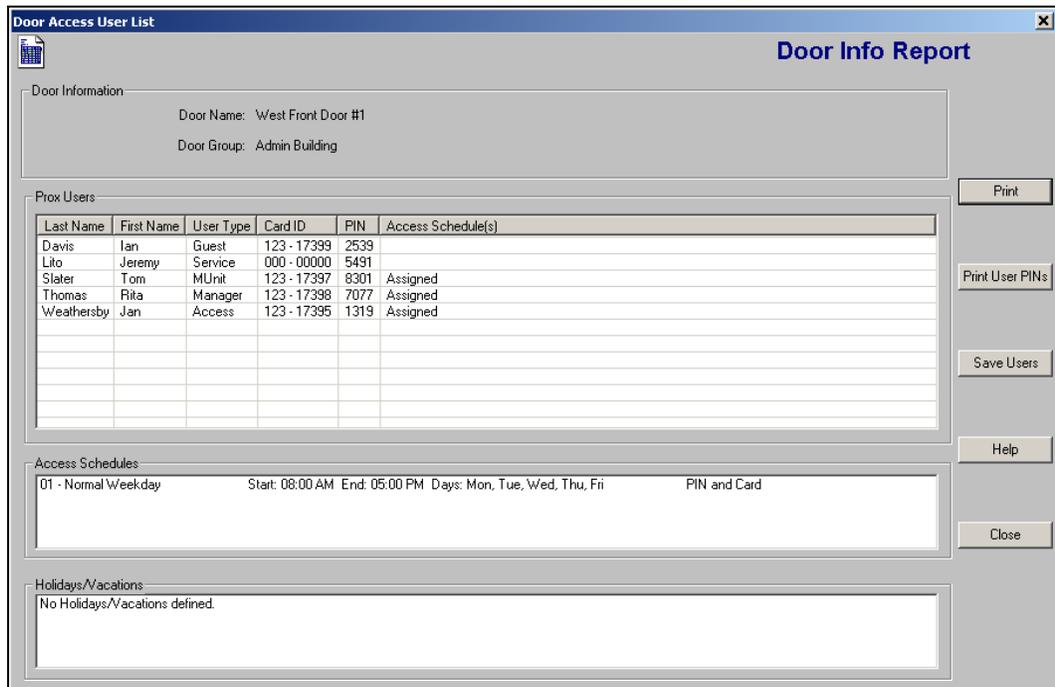
Viewing Detailed Data in an Upload File

Complete the following steps to view detailed data in an upload file:

1. From the **M-Unit Upload** window, select a file from the list by clicking it:



2. Click **View Upload**. The software displays the **Door Info Report** window.



Note: Click **Help** at any time for online help.

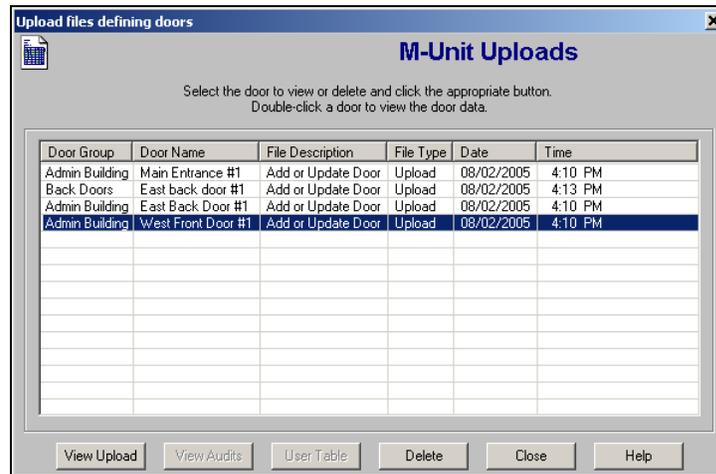
From this window, you can print the report, print user PINs, and save the users in a data file.

3. When you are finished, click **Close**. The software returns to the **M-Unit Uploads** window.

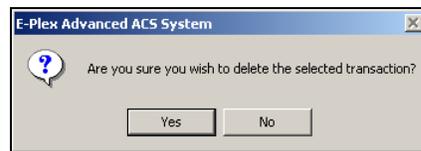
Deleting an Upload

Complete the following steps to delete an upload:

1. From the **M-Unit Upload** window, select a file from the list by clicking it:



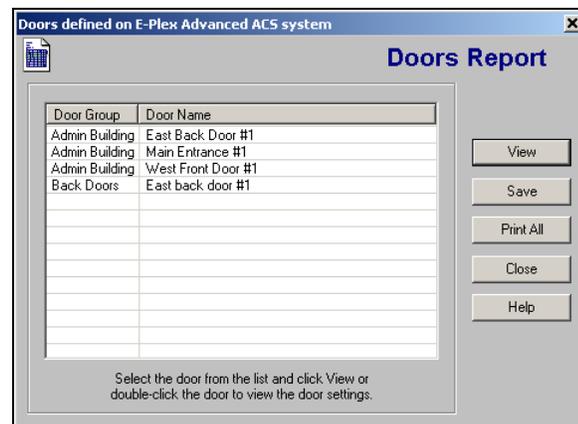
2. Click **Delete**. The software prompts you for confirmation:



3. Click **Yes**. The system deletes the Door Upload and returns to the **M-Unit Uploads** window.

List Doors Report

The List Doors report displays all doors that have been defined in the E-Plex Advanced ACS software. You can select a door to view detailed information about that door's uploads.



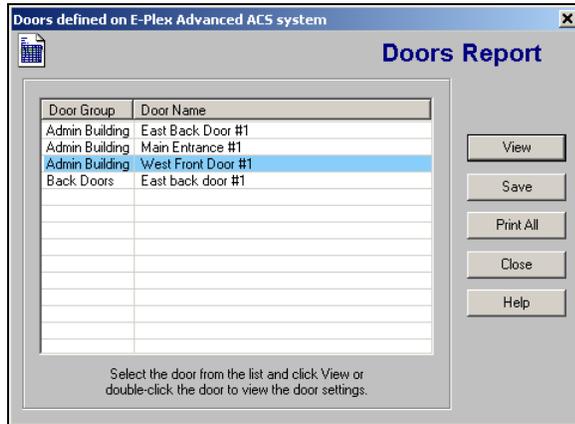
Note: Click **Help** at any time for online help.

From this window, you can view and save the Doors report, print all doors, and view door information.

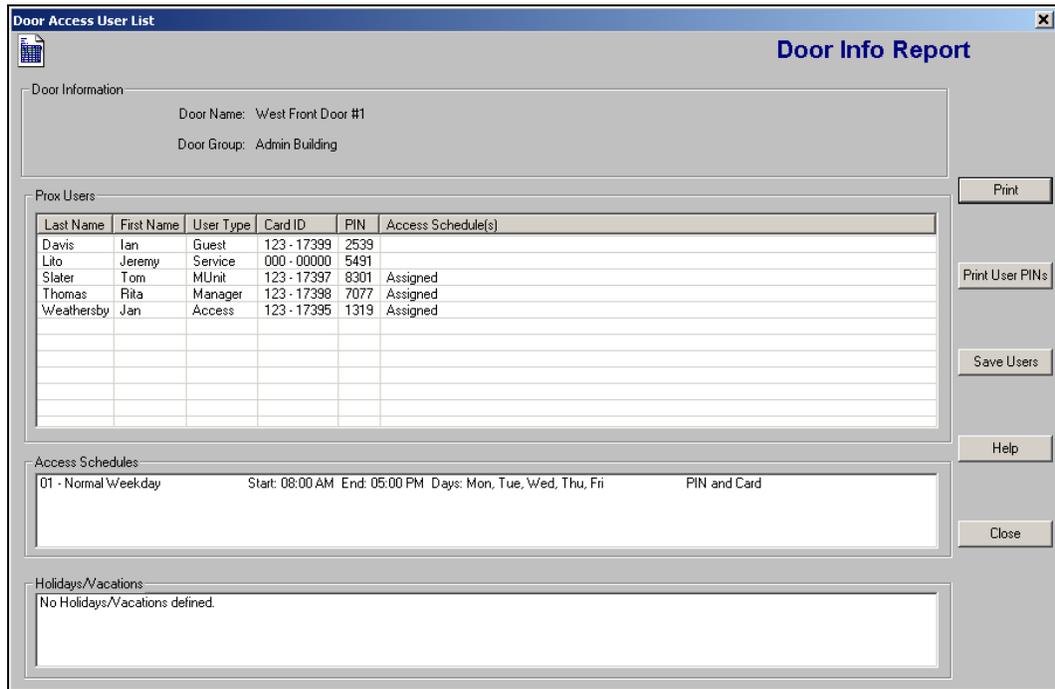
Viewing the Doors Report

Complete the following steps to view door information:

1. From the **Doors Report** window, select a door by clicking it:



2. Click **View**. The software displays the **Door Info Report** window:



Note: Click **Help** at any time for online help.

From this window, you can print the report, print user PINs, and save the users in a data file.

3. When you are finished, click **Close**. The software returns to the **Doors Report** window.

Viewing User Doors and Access Schedules

Complete the following steps to view user doors and access schedules:

1. From the **Door by User Report** window, select a user name from the **User Name** list. The software displays the doors to which the user has access in the **Doors in which user has access** area.

NOTE: To view which door(s) a specific user has access to, select the user. To view which access schedule(s) a specific user is assigned to, select a door from the door list that appears after the user is selected.

User Name		Doors in which user has access	
Last Name	First Name	Door Group	Door Name
Davis	Ian	Admin Building	East Back Door #1
Lito	Jeremy	Admin Building	West Front Door #1
Slater	Tom		
Thomas	Rita		
Weathersby	Jan		

Access Schedules user is restricted to:

Close Print Save

2. To view the access schedules associated with a door, select a door from the **Doors in which user has access** area. The software displays the access schedule in the **Access Schedule user is restricted to** area at the bottom of the screen:

NOTE: To view which door(s) a specific user has access to, select the user. To view which access schedule(s) a specific user is assigned to, select a door from the door list that appears after the user is selected.

User Name		Doors in which user has access	
Last Name	First Name	Door Group	Door Name
Davis	Ian	Admin Building	East Back Door #1
Lito	Jeremy	Admin Building	West Front Door #1
Slater	Tom		
Thomas	Rita		
Weathersby	Jan		

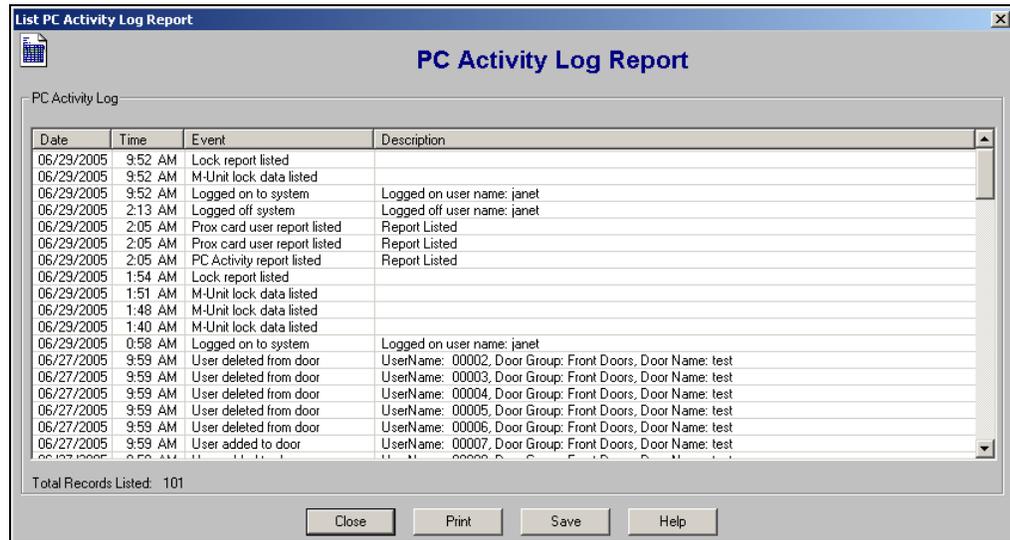
Access Schedules user is restricted to:

Normal Weekday Start: 08:00 AM End: 05:00 PM Days: Mon, Tue, Wed, Thu, Fri Prox Card and PIN Required

Close Print Save

List PC Activity Log Report

The List PC Activity Log Report allows you to view the current data in the PC Activity Log for the E-Plex Advanced ACS software.

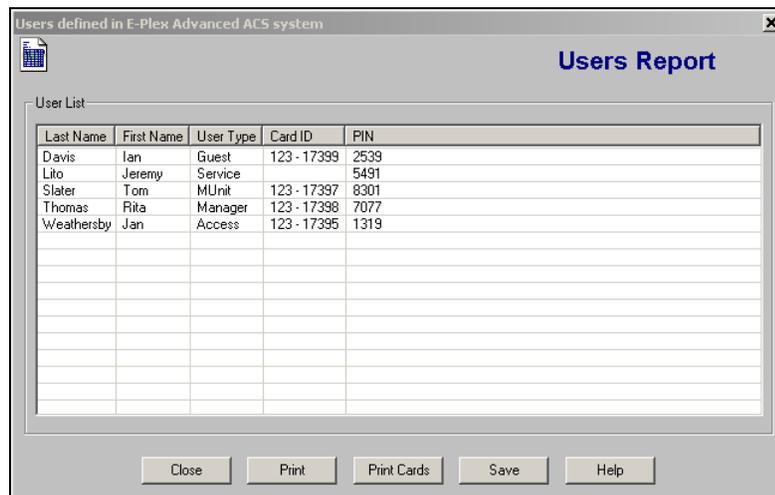


Note: Click **Help** at any time for online help.

From this window, you can print and save the PC Activity Log report.

List Users Report

The List Users report displays all users that have been defined in the E-Plex Advanced ACS software.



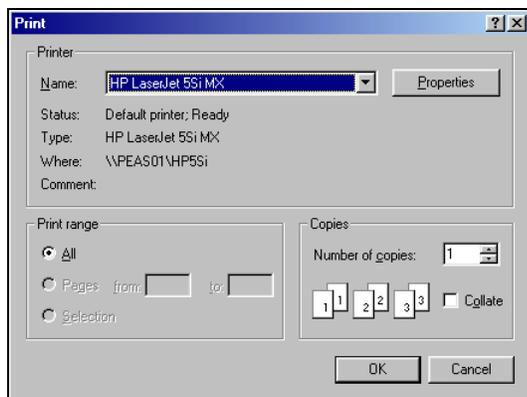
Note: Click **Help** at any time for online help.

From this window, you can print and save the Users report and print user cards.

Printing User Cards

Complete the following steps to print user cards:

1. From the **Users Report** window, click **Print Cards**. The software displays the **Print** window:



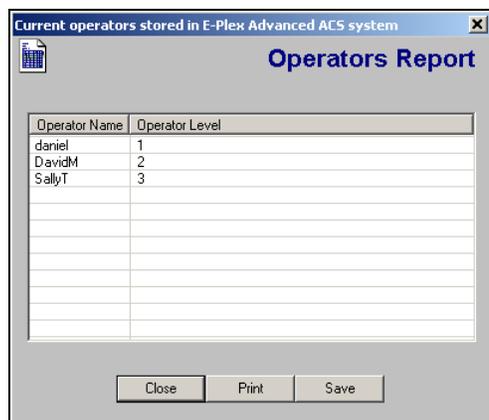
2. Click **OK**. The software sends the report to the printer and confirms that the report is complete:



3. Click **OK** again. The software displays the **Users Report** window.
4. Click **Close**. The software returns to the **Reports Menu** window.

List Operators Report

The Operators report displays all Operators who have been defined in the E-Plex Advanced ACS software.



From this window, you can print and save the Operators report.

4 Operating the E-Plex Lock at its Keypad

This section describes how to operate the E-Plex 5200 and the E-Plex 5700 locks at the lock keypad, including:

- Overview of the Lock
- Configuring the Lock Functions
- Initial Programming of the Lock

Overview of the Lock

This section provides an overview of the lock, including:

- States of the Lock
- Battery Life and Replacement
- Sequence of Operations
- Default Values of the E-Plex 5200 and E-Plex 5700 Lock Programmable Parameters

States of the Lock

There are three states of the lock: Factory Mode, Access Mode, and Pushbutton Programming Mode.

Factory Mode

The Factory Mode is one of three primary states of the E-Plex 5200/E-Plex 5700 locks. The main characteristics of this state are:

- The E-Plex 5200/E-Plex 5700 opens only when the 8-digit master combination (1-2-3-4-5-6-7-8) is keyed in.
- The visual indication for 'access granted' is the green LED flashing once. A high-pitched tone is also generated while the green LED is on.
- The Master User must change the combination to be able to exit the Factory mode, and switch to the Access Mode.

Access Mode

Access Mode refers to a lock that is operational for user access, and not in Factory or Pushbutton Programming Mode.

Pushbutton Programming Mode

The E-Plex 5200/E-Plex 5700 enters the Pushbutton Programming Mode when the user enters the Master combination or one of the Manager combinations, preceded and followed by the # button (for example, #87654321#). Once the E-Plex 5200/E-Plex 5700 is in the Pushbutton Programming Mode, the Master/Manager can enter one or more command sequences. Each command sequence ends with a # that acts like an <enter> button on a keyboard. At the very end of all sequences of programming commands, enter one more # to remove the lock from the Pushbutton Programming Mode to return to normal Access Mode.

Battery Life and Replacement

The E-Plex 5200/E-Plex 5700 locks use four "AA" Alkaline batteries. A variety of factors will determine how long your lock operates on a set of batteries, including:

- Shelf life
- Openings per day
- Environment

- Battery brand
- Access credential settings (PIN, Prox Card, or both)
- Lock settings

In ideal conditions, you can expect up to 120,000 openings using four “AA” Alkaline batteries.

A flash of both red and green LEDs identifies a low battery condition when a valid credential (PIN, Prox Card, or both) is presented, and the lock will still open. When you observe a low battery condition, the batteries should be replaced as soon as possible.

Battery Pack Replacement

Always replace all 4 batteries in the pack with good quality, AA alkaline batteries. If you replace the batteries within 2 to 3 minutes, the lock will continue working as before, granting and denying access to users based on their access schedules.

If the battery replacement time is longer than 2 to 3 minutes, you may lose the current date and time of the lock, even though all the user and lock configuration parameter information will not be lost. When the lock loses its date/time, all of your access schedule times will be out of sync, thus denying access to valid users. In this case, you **MUST** update the lock’s date/time with the current date/time in the M-Unit.

You can do this simply by putting the lock in Communications Mode (enter the 900# command on the lock keypad and tap **Program** on the M-Unit screen) and then tapping **Close**. On the **E-Plex ACS Diagnostics** screen of the M-Unit, tap **Sync Clock**. The M-Unit screen will refresh and displays the correct date and time. Tap **Close** to exit the Diagnostic program, and then tap **Disconnect** to end communications.

Important: Please ensure that your M-Unit’s current date and time are set correctly before synchronizing with the lock. If you forget to update the date/time, the lock will keep flashing the red LED every 8 seconds as a reminder until the lock’s date/time is updated.

Note: In rare instances, when you reconnect the lock with new batteries, the lock may not re-initialize properly; a typical symptom is that the lock does not recognize any pushbutton input. If this happens, disconnect the battery pack, press any one of the pushbuttons for a minimum of 2 seconds to discharge the built-in circuit capacitance, and then re-connect the battery pack. Wait a couple of seconds until you see the green LED flash once, followed by the sound of the motor crunching and a high pitched beep indicating that the lock has re-initialized properly.

Sequence of Operations

This section describes the sequence of operations for accessing and programming the E-Plex 5200/E-Plex 5700 lock.

With the E-Plex 5200/E-Plex 5700 in the Factory Mode:

- Program the lock function of the lock if you want it to be anything other than the factory default “Entry” function.

Note: Refer to the separate “E-Plex 5X00 Lock Function Setup Guide” for instructions on changing to the desired BHMA lock function.

- Change factory Master to your own Master Code (always eight digits) to place lock in Access Mode.

► *Operating the E-Plex Lock at its Keypad*

The lock is now “activated” and can be programmed using the M-Unit (Maintenance Unit) Palm PDA. For **Programming and Auditing Locks** using the M-Unit, refer to Chapter 5.

Default Values of the E-Plex 5200 and E-Plex 5700 Lock Programmable Parameters

Parameters	Factory Default Values
Date (MM/DD/YY)	01/01/00
Time (HH:MM)	00:00
Lock state	Un-programmed
Lock function	Entry
Manual Passage Mode open time limit	Four hours
Passage Mode	Disabled
Lockout Mode	Disabled
Unlock time	Two seconds
Buzzer volume control	Low
Tamper shutdown time	30 seconds
Tamper attempt count	Four attempts
Access code length	Four digits
Master PIN	12345678 (Eight digits)
M-Unit user's status	Disabled
Remote unlock	Disabled

Configuring the Lock Functions

Before putting the lock in service, you must first program the Lock Function when still in Factory Mode. The default lock function for any lock from the factory is “Entry” lock function, which is the same as a Cylindrical lock without a privacy thumbturn, a Mortise lock without a deadbolt, or an Exit Trim lock. The command codes involved here are 011# and 013#. Refer to the separate “E-Plex 5X00 Mortise and Thumbturn Addendum” sheet for detailed instructions.

Initial Programming of the Lock

Once the required lock function is set, the lock must be programmed before daily use. This section provides information about the initial programming of the lock, including:

- Entering Pushbutton Programming Mode
- Modifying the Master User PIN (Command 000#)
- Additional Pushbutton Keypad Commands
- Resetting the Lock
- Summary of Pushbutton Programming Commands
- Visual Feedback Message Definitions

Entering Pushbutton Programming Mode

This section describes the sequence of tasks to program the lock at the keypad in Pushbutton Programming Mode.

1. Put the lock in Programming Mode by pressing **# Master code #**.
2. Use the **Summary of Pushbutton Programming Commands** table on page 8 of this chapter to enter the three digit command sequence (command type + function code), followed by **#**.
3. Enter the appropriate numbers as required.
4. Press **#** to end Programming Mode.
5. Once the lock is in Programming Mode, multiple command sequences can be entered without having to repeat the **# Master code #**. However, if there is no activity for 15 seconds at the keypad, the lock will automatically exit from Programming Mode.

Example

- If the Master or Manager enters his/her code of **87654321**, the door will open.
- If he/she enters **#87654321#**, the lock will enter into the Programming Mode and wait for the next part of the command.
- If he/she enters **#** twice at the end of the code, for example **#87654321##**, the lock will go out of Programming Mode and return to its normal mode.

Note 1: The # (pound sign) acts like the Enter key on a keyboard in your communications with the lock. The # tells the lock that one part of the entry is finished. The # serves another purpose—to distinguish a programming type command from a simple Access code to open the door. A Master or Manager User can use the same number to open the door or to put the lock in Programming Mode, the only difference being that he or she uses the # sign in front to signal that he or she is about to enter a programming command.

Note 2: Correct errors during a command sequence. If an invalid entry occurs, recover from the mistake by entering the (*) key, which will clear all entries made from the beginning of the current command sequence, and will reset the 15-second time limit for entering the code. In this case, you still have 15 seconds from the first number entered to enter the whole code.

Modifying the Master User PIN (Command 000#)

Required User Level: Master

To change the Factory code or current Master code, follow these steps:

1. Put lock into Pushbutton Programming Mode.
2. Use the command, **000**, for Master, then the new Master code number.
3. You must use eight digits between 00000000 and 99999999 as follows: **000#MMMMMMM#**; for example, **000#87654321#**.

4. Enter the Master Code again **87654321#** for confirmation.

Example of complete entry: **000#87654321#87654321#**.

5. Key in another **#** to indicate the end of programming.
6. After you are finished, you will always use your own Master code. Please write down the code and keep in a safe place. The factory code is no longer valid.

Additional Pushbutton Keypad Commands

The following operations can only be performed at the lock's keypad. All other functions are to be set up and sent from the E-Plex Advanced ACS software via the M-Unit/Palm PDA.

- Activating/de-activating Passage Mode (command 399#)
- Activating/de-activating Lockout Mode (command 499#)
- Performing manual diagnostics (command 500#)
- Identifying a lock model (command 501#)

Activating/De-activating Passage Mode (Command 399#)

You have already set up in the software a default duration for a lock to remain in manual Passage Mode. When you activate manual Passage Mode at the lock keypad, it becomes enabled for the duration you have set in the software.

If your length is six hours, and you manually activate Passage Mode at 1:00, it will automatically re-lock at 7:00. Even if the lock was taken in and out of Passage Mode multiple times during the six-hour period, it will still re-lock after six hours (programmable) from the original starting period. This ensures that a lock will never remain in Passage Mode beyond the programmed time period.

Note: *This manual Passage Mode function is different than the automatic access schedule-based Passage Mode setup in the software.*

Required User Level: Master, Manager

1. Put the lock into Pushbutton Programming Mode.
2. Enter command **399#** to activate/de-activate Passage Mode.
3. Enter the code where **1** = activate Passage Mode and **0** = de-activate Passage Mode.
Example of complete entry to activate Passage Mode **399#1#** and **399#0#** to de-activate Passage Mode.
4. Enter another **#** to indicate the end of programming.

Activating/De-activating Lockout Mode (Command 499#)

You may need to use Lockout Mode, for example, during a fire or fire drill when you do not want anyone to return to his or her office. This procedure will de-activate all regular User Access codes that are active, including Manager codes, but excluding the Master code.

Required User Level: Master

1. Put the lock into Pushbutton Programming Mode.
2. Enter command **499#** for Lockout Users Mode (all except Master).
3. Enter **1#** to activate Lockout Mode and **0#** to disable it.
Example of complete entry: **499#1#** or **499#0#**.
4. Enter another **#** to indicate the end of programming.
5. You have now activated or de-activated Lockout Mode.

Performing Manual Diagnostics (Command 500#)

Use the Diagnostics code to perform manual diagnostics of the lock, green LED, red LED, buzzer, and the twelve pushbuttons—0 through 9, * and #.

Note: You will need the M-Unit/Palm PDA to perform these diagnostics.

Required User Level: Master

1. Put the lock into Pushbutton Programming Mode.
2. Enter command **500#** for Diagnostics. You will see a green LED and hear a high beep followed by a red LED and a low beep.
3. Press **123456789*0#**, in that exact order, to test each pushbutton. If every pushbutton is working correctly, you will see a green LED and hear a normal beep for each pushbutton that is pressed.

Example of Complete Entry: **500#123456789*0#**.

4. Enter another **#** to indicate the end of programming.
5. If you see a red LED at any time that you are pressing a pushbutton, or at the end of the code, there could be a problem with the pushbuttons.
6. Enter another **#** to indicate the end of programming.
7. If you still see the red LED, the lock has a problem. Call a service person to repair or replace the lock.

Identifying a Lock Model (Command 501#)

Use the Lock Model Identification code to identify if the lock model is E-Plex 5200 or E-Plex 5700.

Required User Level: Master, Manager

1. Put the lock into Pushbutton Programming Mode.
2. Enter command **501#** for Lock Model Identification.
3. The lock will flash the red and green LEDs twice with accompanying high-pitched tone for E-Plex 5200 and seven times for E-Plex 5700.
4. Enter another **#** to indicate end of programming.

Resetting the Lock

You can return to factory default parameters by performing a **Hard Reset**. This returns the lock to Factory Mode including deleting all codes, putting the lock back to factory default values (4-digit access code length) and making the Master code **12345678**. Also, the lock function will revert to the default “Entry” function. A hard reset is performed as follows.

1. Insert the key, turn to retract latch, and hold in open position.
2. Within 5 seconds, press **#** and then release the key.
3. While red/green light flashes, press **12345678#** on keypad.

The lock will reset. You will see two flashes of the green light with a corresponding high pitch tone, followed by the motor “crunch,” indicating that the reset is successful.

The lock is now reset to the Factory Mode and the Master code is now 12345678.

Summary of Pushbutton Programming Commands

Name	Command	Description	Authorization
Configuration	000 # MMMMMMMM# MMMMMMMM#	Modify Master User PIN (lock's activation) (Always eight digits)	Master
Manual Passage Mode	399# P#	Activate/de-activate Passage Mode P = 0 or 1; 0 = disable Passage Mode; 1 = enable Passage Mode	Master, Manager
Global Lockout Mode	499# L#	Activate/de-activate Lockout Mode (Master User is not affected by Lockout Mode) L = 0 or 1; 0 = disable Lockout Mode; 1 = enable Lockout Mode	Master
Diagnostics	500# 123456789*0#	Manual diagnostic	Master, Manager
Lock Model Identification	501#	Identify if the lock is an E-Plex 5200 or E-Plex 5700: Two sets of green and red LED flashes for E-Plex 5200 and seven sets of green and red LED flashes for E-Plex 5700.	Master, Manager
Communication Startup	900#	Communications startup	Master, Manager

Visual Feedback Message Definitions

Condition	Parameters			
	Green LED	Red LED	Duration	Rate
Valid pushbutton pressed	ON	OFF	1/10 sec	Once
Timeout expired	OFF	ON	1 sec	Once
Valid Access code keyed	ON	OFF	1 sec	Once
Access granted	ON	OFF	1/10 sec	1 sec
Access granted (battery low condition)	ON	ON	1/10 sec	1 sec
Access denied	OFF	ON	1 sec	Once
Valid programming entry	ON	OFF	1 sec	Once
Invalid programming entry (including duplicate access code)	OFF	ON	1 sec	Once
Tamper shutdown beginning	OFF	ON	2 sec	Once
Tamper shutdown state	OFF	ON	1 sec	10 sec
Tamper shutdown ending	ON	OFF	2 sec	Once
Communication starting	ON	OFF	1 sec	Once
Communication ending	ON	OFF	1 sec	Once
Communication aborted	OFF	ON	1 sec	Once

Condition	Parameters			
	Green LED	Red LED	Duration	Rate
Communication in progress	ON (Alternate)	ON (Alternate)	1/10 sec	1 sec
Hard Reset sequence in progress	ON (Alternate)	ON (Alternate)	1/2 sec	Continuously
Hard Reset sequence successful	ON	OFF	2 sec	Once
Hard Reset sequence failed	OFF	ON	2 sec	Once

► *Operating the E-Plex Lock at its Keypad*

5 Programming and Auditing Locks

The Maintenance Unit (M-Unit Palm PDA) is used to transfer (upload) data to and receive (download) data from the locks for the purpose of programming and auditing the locks. The items explained in this chapter include:

- M-Unit Handheld PDA
- Programming Locks
- Auditing Locks
- Viewing Lock Diagnostics
- Data Management

M-Unit Handheld PDA

The Maintenance Unit (M-Unit) is Kaba Access Control's term for a handheld Personal Digital Assistant (PDA) that communicates with the locks via infrared signal. The M-Unit PDA connects to your PC to receive data downloaded from the PC (Lock Configuration Files, for example), and to upload/program the locks. The infrared receiver and transmitter on the PDA, when aligned with those of the lock, will transfer data from the PDA to the lock (program) or from the lock to the PDA (audit).

Important: Ensure that the current date and time on your system PC and your PDA are accurate, including the Daylight Savings Time setup. If the date and time are not correct, your users will not be able to access the lock.

The operations involving the M-Unit are the following:

- Create Lock Configuration Files (including user data) for each lock in a door group.
- Transfer (HotSync) Lock Configuration Files from PC to M-Unit.
- Program the locks using the M-Unit.
- From the **Audit** icon, select the number of records to audit—500 is the default and 30,000 (all audits) is the maximum. If you also want to download the User Table (users assigned to this lock), select the **User Table** check box.
- Audit the locks using the M-Unit.
- Transfer (HotSync) Lock Audit Files from the M-Unit to the PC.
- View and/or print Lock Audit Files on PC from the **Reports** menu.

Note: From the **E-Plex ACS** drop-down menu at the top left of the PDA screen, you can also Perform Lock Diagnostics, as well as view or select Lock Configuration files from each Door Group before programming locks.

The sequence of operations using the M-Unit is described in detail in the following procedures:

1. Transferring Files from the PC the to the M-Unit (HotSync)
2. Transferring Files from the PC to the Lock through the M-Unit
3. Auditing Lock
4. Transferring Lock Audits from the M-Unit to the PC (HotSync)

Note: These procedures are not described in detail here, since you can perform them by following the steps as directed by the prompts on the PDA screen.

M-Unit User Definition

The E-Plex 5200 and E-Plex 5700 locks can have special M-Unit User Access credentials (PIN, Prox, or both). This credential is used only to program and/or audit the lock using the M-Unit PDA as a maintenance function only—the code will NOT open the door. When an M-Unit User presents/enters his or her M-Unit credential, the lock enters the Communications Mode with the M-Unit handheld PDA immediately (equivalent to entering the command #M-Unit PIN/Card#), indicated by alternate green and red flashing LEDs. Now the M-Unit User can program the lock.

Programming Locks

To program locks, the M-Unit User uses the M-Unit to transfer lock data from the E-Plex Advanced ACS software to the E-Plex 5200/E-Plex 5700 lock.

Note: Before you can transfer lock data to E-Plex 5200/E-Plex 5700 locks, you must first prepare the data in the E-Plex Advanced ACS software. Refer to **Programming Locks** in chapter 3, **Using the E-Plex Advanced ACS Software**, for more information.

Once lock data has been prepared at the PC, you are ready to transfer data to the locks. Complete the following steps to transfer data to the E-Plex 5200/E-Plex 5700 lock using HotSync.

Transferring Files from the PC to the Lock through the M-Unit

1. HotSync the M-Unit. Refer to steps 1–4 of **HotSyncing the M-Unit** in Chapter 2, **Getting Started**.

Note: If it appears that the lock data did not successfully transfer to the M-Unit, you should check to make sure that the Palm HotSync E-Plex ACS Conduit has been installed on the PC.

To do so, right click on the **HotSync** icon in the system tray of the PC. Select **Custom** from the menu options to display the list of installed conduits and their actions. If “E-PlexACS” is not found in the list, go to the Windows Start menu on the PC and access **Start | Programs | E-Plex Advanced ACS | Install Palm HotSync E-Plex ACS Conduit** to install the conduit. Then, repeat the process to upload data from the PC to the M-Unit.

2. After you have transferred the files from the PC to the M-Unit, disconnect the M-Unit from the PC.

Note: Before you can use the M-Unit to program locks, you must have entered the Customer Key. Refer to **Entering Customer Key Information Into the M-Unit** in Chapter 2, **Getting Started**, for more information.

3. Go to the door you want to program.

► *Programming and Auditing Locks*

4. On the pushbuttons, enter one of the following sequences as applicable:

Master PIN # 900#

Manager PIN # 900#

M-Unit PIN

Note: Hereinafter, these codes will be referred to as credentials.

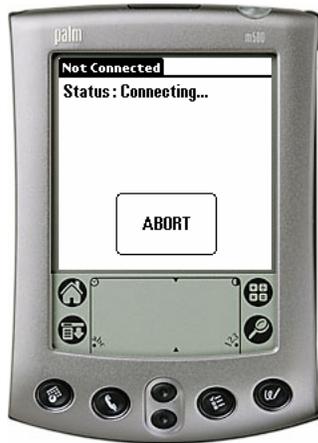
5. The lock now enters the Communication Mode, indicated by alternate green and red LEDs flashing every second for up to 30 seconds.
6. Tap the **E-Plex ACS** icon on the M-Unit screen.



7. The M-Unit displays the **E-Plex ACS** main screen, where you can select Program or Audit.



8. Tap **Program**. The M-Unit begins connecting with the lock. The screen displays a message indicating that the M-Unit is connecting to the lock. You can click **Abort** to stop connecting for any reason.



9. With the screen facing upwards, hold the M-Unit up to the lock at a distance of between 4 inches and 10 inches (10 cm and 25 cm). Position the top edge of the M-Unit parallel to the infrared glass window located above lock code buttons 1 and 2.

E-Plex 5200



E-Plex 5700



Note: If you receive a message that the communication failed, repeat the procedure. Ensure that you are holding the M-Unit in the correct position, pointing it straight at the lock lens, and at the correct distance.

► *Programming and Auditing Locks*

10. When the M-Unit and lock are communicating, the M-Unit displays the **Data Management** screen with available door groups.



11. Select the door group for the door you are programming. The **Data Management** screen displays the doors in the selected door group.



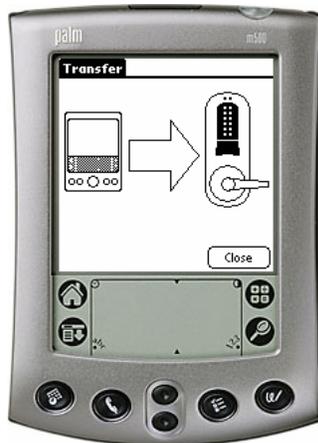
12. Select the door you are programming from the list.



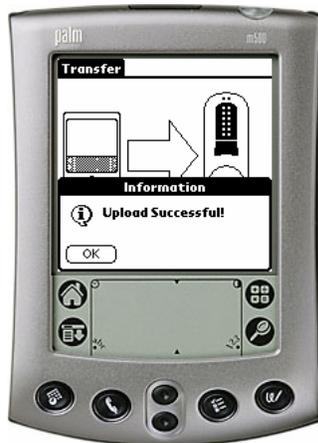
13. The M-Unit prompts you that the file is ready to upload.



14. Tap **Upload**. The transfer of data from the M-Unit to the door lock begins.



15. After the transfer is complete, the M-Unit displays the following prompt:



16. Tap **OK**. The upload is successful. The M-Unit returns to the **E-Plex ACS** main screen.



17. Tap **Disconnect** to properly disconnect the M-Unit from the lock.
18. Repeat steps 3–17 to program additional doors.

Auditing Locks

Before you can audit locks, you must select the number of records you want to see each time you do an audit. The default is 500 and the maximum is 30,000. To select the number of records, tap **E-Plex ACS** and select **Preferences** from the drop-down menu. Under **Audit Records**, select the number—any number between 50 and 30,000. The preference is saved even after you log out. To change the number of records, return to the **Preferences** menu. You can also select audits from the last 7 days, the last 30 days, or new audits only.

Transferring Files from the Lock to the M-Unit

1. Go to the door you want to audit.
2. On the pushbuttons, enter one of the following sequences as applicable:
 - # Master PIN # 900#
 - # Manager PIN # 900#
 - # M-Unit PIN #

Note: Hereinafter, these codes will be referred to as *credentials*.

3. The lock now enters the Communication Mode, indicated by alternate green and red LEDs flashing every second for up to 30 seconds.

4. Tap the **E-Plex ACS** icon on the M-Unit screen.



5. The M-Unit displays the **E-Plex ACS** main screen.



6. Tap **Audit**. The M-Unit begins connecting with the lock.
7. With the screen facing upwards, hold the M-Unit up to the lock at a distance of between 4 inches and 10 inches (10 cm and 25 cm). Position the top edge of the M-Unit parallel to the infrared glass window located above lock code buttons 1 and 2.

E-Plex 5200



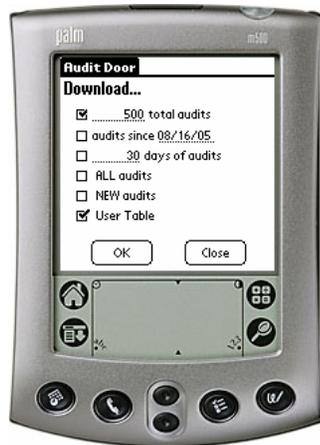
E-Plex 5700



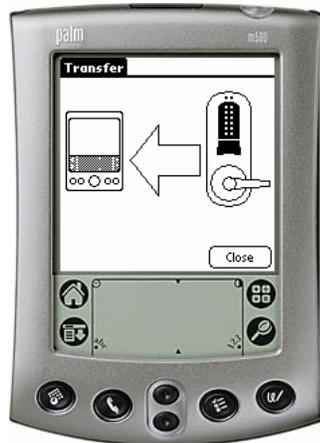
Note: If you receive a message that the communication failed, repeat the procedure. Ensure that you are holding the M-Unit in the correct position, pointing it straight at the lock lens, and at the correct distance.

- When the Lock and M-Unit are communicating, the M-Unit displays the **Audit Door** screen with a list of options to download. Select the check boxes relevant to your audit and tap **OK**.

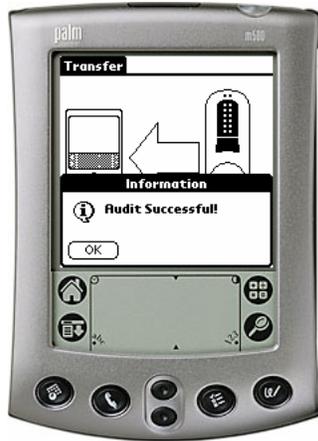
Note: To download the *User Table*, a list of all users with access to the lock, select the **User Table** check box.



- The transfer of data from the lock to the M-Unit begins.



10. After the transfer is complete, the M-Unit displays the following prompt:



11. Tap **OK**. The download is successful. The M-Unit returns to the **E-Plex ACS** main screen.



12. Tap **Disconnect** to disconnect the M-Unit from the lock.

13. Repeat steps 1–12 to audit additional doors.

Transferring Lock Audits from the M-Unit to the PC

Complete the following steps to transfer lock audits from the M-Unit to the PC.

1. After downloading the lock audit to the M-Unit PDA, return to your PC.
2. Connect the M-Unit to the PC with the cradle or cable.
3. HotSync the M-Unit. Refer to steps 1–4 of **HotSyncing the M-Unit** in Chapter 2, **Getting Started**.

Note: If it appears that the lock data did not successfully transfer to the M-Unit, you should check to make sure that the Palm HotSync E-Plex ACS Conduit has been installed on the PC.

To do so, right click on the **HotSync** icon in the system tray of the PC. Select **Custom** from the menu options to display the list of installed conduits and their actions. If “E-PlexACS” is not found in the list, go to the Windows Start menu on the PC and access **Start | Programs | E-Plex Advanced ACS | Install Palm HotSync E-Plex ACS Conduit** to install the conduit. Then, repeat the process to upload data from the M-Unit to the PC.

4. After you have transferred the files from the M-Unit to the PC, disconnect the M-Unit from PC.
5. To transfer audits into the E-Plex Advanced ACS software, refer to **Auditing Locks** in Chapter 3, **Using the E-Plex Advanced ACS Software**.

Viewing Lock Diagnostics

You can view lock diagnostics when connected to the lock. This provides you information about:

- The model of the lock
- The lock function
- Time and date
- Battery life
- VCC
- CPU MHz
- Firmware version
- Last key pressed on the lock
- Days in use (since first startup)
- Privacy/deadbolt on/off
- Remote unlock on/off
- Key override on/off

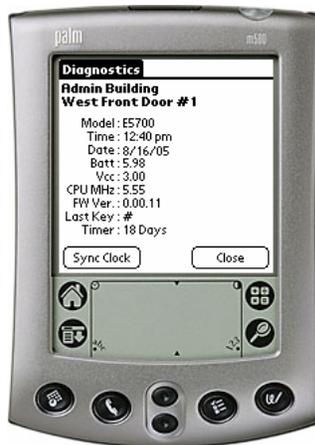
To View Lock Diagnostics

Complete the following steps to view lock diagnostics.

1. Connect the M-Unit to the Lock using the Communications code.
2. From the **E-Plex ACS** main menu, select **Diagnostics**.



The M-Unit displays the **Diagnostics** screen.



3. Tap **Sync Clock** if you want to synchronize the lock's clock with the M-Unit's.
4. When you are finished, tap **Close**.

Data Management

From the M-Unit, you can manage existing lock data files on the M-Unit. You can view lock data files that you have transferred to the M-Unit and delete them if you no longer need them.

Managing Lock Data

Complete the following steps to manage lock data, including viewing data and deleting it.

1. From the **E-Plex ACS** main menu, select **Data Mgt.**



2. The M-Unit displays the **Data Management** screen with available door groups.



3. Select the door group for the door you want to manage. The **Data Management** screen displays the doors in the selected door group.



4. Select the door you are managing from the list.

To View Lock Data

5. Tap **Select**. The M-Unit displays the door data.



To Delete Lock Data

6. Tap **Delete**. The M-Unit prompts you for confirmation.



7. Click **OK**. The M-Unit deletes the lock data.

