Axessor Apexx

Software User Guide

Table of contents

Application Settings

The Application Settings menu contains the tools needed to manage firmware and certificates. It also the allows an administrator the ability to create automated email alerts based on the occurrence of one or more user selected Audit Events.

Follow the links below for details about each of the following Application Settings screens:

Audit Event Settings

Firmware Management

Certificate

Management

Audit Event Settings

The Audit Event Settings screen allows an administrator the ability to send out email alerts based on the occurrence of one or more user selected Audit Events. If an Audit Event Alert is enabled, all email addresses included in the alert list will receive an email whenever one of the selected Audit Events occur.

The email, titled "Apexx Live Audit Event", will contain the following information regarding the Audit Event (if applicable):

- Region
- Lock System
- Support Contact
- Audit
- User (ID number and User Name)
- Time

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

- ◆ Searching/Filtering The Audit Event Settings Search Screen
- ◆ Displaying/Navigating the Audit Event Settings list
- ◆ Configuring_your_Email_Service_(SMTP)
- ◆ Creating a new Audit Event Alert
- ◆ Enable/Disable an Audit Event Alert
- ◆ Editing an Audit Event Alert
- ◆ Deleting an Audit Event Alert

Searching/Filtering the Audit Event Settings Search Screen

There are three useful tool icons located at the top of the list of Audit Event Alerts that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the Audit Event Alerts in ascending or descending order based on the chosen Sort Category.

Filter - when you click the Filter icon , the screen expands to reveal a series of text fields and drop-down fields. You can use one or multiple of these fields to filter the data in the Audit Event Alert list. Click the Filter icon again to close the filter.

- Name - use this text field to enter an Audit Event Alert name, or a partial name ("Alert 1", or just "Alert", "1", "A", etc.)

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to Reset the filter to see the full list of Audit Event Alerts

In addition to these tools, the status of each Audit Event Alert is indicated by a large Enabled/Disabled icon.

 = Enabled (email alerts WILL be sent), mail alerts will NOT be sent)

Displaying/Navigating the Audit Event Settings list

There are additional tool icons and buttons located at the bottom of the list of Audit Event Alerts that allow you to modify how the data in the list is presented:

Rows Per Page - click the drop-down menu to select the number of rows of data you want displayed per page.

First Page - click the button to navigate to the first page of data.

Previous Page - click the button to navigate to the previous page of data.

Next Page - click the button to navigate to the next page of data.

Last Page - click the button to navigate to the last page of data.

Configuring your Email Service (SMTP)

how to set up your Email (SMTP) Server (click to expand)

Before creating Audit Event alerts, you must configure your Simple Mail Transfer Protocol (SMTP) settings so that these email alerts can be sent using your email system.

To configure the Email Service, you must edit the appsettings.json file located within the API folder of your Apexx Series Software installation. Within this file, you must edit the "EmailServiceSettings" section to include all of the required information. The following shows the minimum amount of information required for configuration:

```
"EmailServiceSettings": {

    "MailServer_Host": "",    < This is required and must be a valid IP
    or URL to the SMTP Host

"From": "",   < This is required but can be an invalid "no-reply" email address
"UserName": "",    < the user name used to authenticate with the SMTP host
"Password": "",    < the password used to authenticate with the SMTP host
"Bearer": null,      < this is used if a bearer token has been provided to
authenticate with the

    SMTP host
    "Port": 587, < this is the port to communicate with the SMTP host.
    It is required and is
defaulted to 587
    "TimeOut": null,  < this is optional and specifies the time to wait
(in seconds) for the email to send before the operation times out

 }
```

The Apexx Communications Web Service has an endpoint that allows the user to test their email configuration.

It is **https://[uriToApexxAPI]/Email/TestSendEmail?recipient=[theEmailAddressToSendTheTestTo]**

Important! Note: The "From" email address that is provided in the service settings **should** allow users to reply to it if they wish to be removed from the notification email list. An Apexx administrator should receive the email and they will have to edit the event settings to remove the person's email from the audit event settings. When the email is sent, there will be a section that will state that they can be removed from the notification list by contacting an Apexx administrator.

Creating a new Audit Event Alert

how to create an Audit Event Alert (click to expand)

To create a new Audit Event Alert, do the following:

1. From the main menu, click Application Settings > Audit Event Settings

2. From the Audit Event Settings Search screen, click the Add icon located at the bottom of the screen.

3. In the field provided, enter a name for the Audit Event Alert.

4. Click the Save button to create the new Audit Event Alert.

Audit Event Alert - Assigning Lock Systems

To include one or more Lock Systems in the Audit Event Alert, do the following:

1. From the Audit Event Alert's details screen, click the Add icon located at the bottom of the screen of
the "Lock Systems" section.

2. In the "Add Lock Systems" window, click the sliders to add the corresponding Lock Systems to the new Audit Event Alert

   - A light grey slider to the left indicates that the Lock System is not included in the Audit Event Alert.

   - A bright blue slider to the right indicates that the Lock System is included in the Audit Event Alert.

3. Click the Add button.

Audit Event Alert - Choosing Recipients (Communication Action)

To choose the recipients of the Audit Event Alert, do the following:

1. From the Audit Event Alert's details screen, click the Add icon located in the "Communication Action" section of the screen.

2. Click the "Recipients" text-box and enter the recipient's email address.

3. Use the drop-down menu to select a Notification Language.

4. Click the Add button.

Audit Event Alert - Choosing Audit Events

To choose which Audit Events will trigger an Audit Event Alert, do the following:

1. From the Audit Event Alert's details screen, click the Add icon ➕ located in the "Audit Events" section.

2. In the "Add Audit Events" window, click the sliders to add the corresponding Audit Event to the new Audit Event Alert

    - ◯ A light grey slider to the left indicates that the Audit Event is not included in the Audit Event Alert.

    - 🔵 A bright blue slider to the right indicates that the Audit Event is included in the Audit Event Alert.

3. Click the Add button.

4. Repeat Steps 2 and 3 for any additional Audit Events you want to add.

5. Click the Close button.

Editing an Audit Event Alert

Enable/Disable an Audit Event Alert

how to Enable/Disable an Audit Event Alert (click to expand)

To Enable/Disable an Audit Event Alert, do the following:

1. From the main menu, click Application Settings > Audit Event Settings

2. From the Audit Event Settings Search screen, locate and double-click the name of the Audit Event Alert

    you want to edit, or click the corresponding Edit button ✏️ (pencil)

3. In the details screen, locate the Enable/Disable slider. Click the slider to put the Alert in the desired state.

    - ◯ A light grey slider to the left indicates that the Audit Event Alert is Disabled (email notifications will not be sent)

    - 🔵 A bright blue slider to the right indicates that the Audit Event Alert is Enabled (email notifications will be sent)

4. Click the Save button.

Editing an Audit Event Alert

how to edit an Audit Event Alert (click to expand)

To edit an Audit Event Alert, do the following:

1. From the main menu, click Application Settings > Audit Event Settings

2. From the Audit Event Settings Search screen, locate and double-click the name of the Audit Event Alert

    you want to edit, or click the corresponding Edit button ✏️ (pencil)

3. Edit the any fields, settings, and assignments you want to change.

4. Click the Save button to store the changes.

Audit Event Alert - Unassigning Lock Systems

To remove a Lock Systems from inclusion in an Audit Event Alert, do the following:

1. From the main menu, click Application Settings > Audit Event Settings

2. From the Audit Event Settings Search screen, locate and double-click the name of the Audit Event Alert
   you want to edit, or click the corresponding Edit button ✎ (pencil)

3. In the Lock System list, locate the name of the Lock System you want to unassign, then click the
   corresponding Delete button 🗑 (trashcan)

4. Confirm that you want to remove the Lock System by clicking the "Yes" button in the confirmation popup
   window.

Audit Event Alert - Removing a Recipient

To remove a recipient from the Audit Event Alert list, do the following:

1. From the main menu, click Application Settings > Audit Event Settings

2. From the Audit Event Settings Search screen, locate and double-click the name of the Audit Event Alert
   you want to edit, or click the corresponding Edit button ✎ (pencil)

3. Under "Communication Action", in the Recipient list, locate the recipient you want to remove, then click
   the corresponding Delete button 🗑 (trashcan)

4. Confirm that you want to remove the Recipient by clicking the "Yes" button in the confirmation popup
   window.

Audit Event Alert - Unassigning an Audit Event

To unassign an Audit Event from a particular Audit Event Alert, do the following:

1. From the main menu, click Application Settings > Audit Event Settings

2. From the Audit Event Settings Search screen, locate and double-click the name of the Audit Event Alert
   you want to edit, or click the corresponding Edit button ✎ (pencil)

3. Under "Audit Events", in the Recipient list, locate the Audit Event you want to remove from the Audit
   Event Alert, then click the corresponding Delete button 🗑 (trashcan)

4. Confirm that you want to remove the Audit Alert by clicking the "Yes" button in the confirmation popup
   window.

Deleting an Audit Event Alert

how to delete an Audit Event Alert (click to expand)

To delete an Audit Event Alert, do the following:

1. From the main menu, click Application Settings > Audit Event Settings

2. From the Audit Event Settings Search screen, locate the name of the Audit Event Alert you want to edit, or click the corresponding Delete button 🗑(trashcan).

Firmware Management

The Firmware for all Apexx Series Locks, Keypads, and eBoxes can be managed and used to update your devices using the Firmware Management screen.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

- ◆ Viewing, Searching, and Filtering the Firmware Management list
- ◆ Displaying/Navigating the Firmware Management list
- ◆ Adding firmware files to the Firmware Management List ◆ Updating your device firmware

Viewing, Searching, and Filtering the Firmware Management list

Device firmware is packaged together in .zip folders, each containing firmware files for Keypads, Locks, and eBoxes. The Firmware Management screen can be used to view and manage the contents of these .zip folders.

Click the .zip folder name to expand the folder and view the contents of the folder in the Firmware list.

There are three useful tool icons located at the top of the list of Firmware files (Firmware Management) that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon ▤ to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the Lock Systems in ascending ▲ or descending ▼ order based on the chosen Sort Category.

Filter - when you click the Filter icon ▽ , the screen expands to reveal a series of text fields and drop-down fields. You can use one or multiple of these fields to filter the data in the Firmware Management list. Click the Filter icon again to close the filter.

- • Name - use this text field to enter the full or partial name of the folder containing the firmware files
- • Version - use this text field to enter a full or partial firmware version number
- • Device Type - use the drop-down menu and select from the list of devices (Keypad, Lock, eBox)
- • Firmware Type - use the drop-down menu and select the Firmware type (Boot Loader, Application, Cryptographic Key, Certificate, or Data)

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to Reset the filter to see the full list of Firmware files

Displaying/Navigating the Firmware Management list

There are additional tool icons and buttons located at the bottom of the list of Firmware files that allow you to modify how the data in the list is presented:

Rows Per Page - click the drop down menu ▾ to select the number of rows of data you want displayed per page.

First Page - click the �κ button to navigate to the first page of data.

Previous Page - click the < button to navigate to the previous page of data.

Next Page - click the > button to navigate to the next page of data.

Last Page - click the » button to navigate to the last page of data.

Adding firmware files to the Firmware Management List

1. Click the Add icon ⊕ located at the bottom of the screen to add a firmware file to the Firmware Management list. This will open a file explorer window.

2. Navigate to the folder on your computer that contains the firmware file you want to add, select the file, then click "Open".

Updating your device firmware

Keypad, Lock, and eBox firmware can be updated using the "Update Firmware" button, found on the Lock Systems details screen. See Lock Systems for details.

Certificate Management

The Apexx System utilizes a Public Key Infrastructure to create, store, and distribute digital certificates to Apexx devices via a certificate authority. The Certificate Management screen allows you to view and manage some of the certificates used and issued by the Apexx System.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

- ◆ Certificate Authority ◆ Issued Certificates ◆ MQTT Connections

Certificate Authority

The Apexx .NET Root CA is created during the installation of Apexx Series Software. Any computer that is running the software (client, server, database, etc.) requires a copy of this certificate for security/identification purposes.

Exporting the Certificate Authority

The certificate authority can be exported via a .PEM file (Privacy Enhanced Mail), which can then be copied to other devices that require it for authentication purposes. To export the Apexx .NET Root CA, do the following:

1. From the main menu, click Application Settings > Certificate Management

2. Under "Certificate Authority", click the Export button.

3. In the file explorer window, enter a File Name, then choose a location to store the file.

4. Click the "Save" button to complete the export.

Issued Certificates

The "Issued Certificates" section of the Certificate Management screen allows you to view all issued eBox TLS Client certificates (used for authentication of the eBox, one certificate issued per eBox).

The 🔍 Search box can be used to search for a specific certificate by Subject or Status.

MQTT Connections

Message Queuing Telemetry Transport, or MQTT, is a messaging protocol that utilizes a publish-subscribe model to facilitate communication between devices. The Apexx MQTT Broker/Server acts as a centralized messaging hub and utilizes the MQTT protocol to manage communication between all Apexx devices.

The "MQTT Connections" section will list all MQTT connections by device IP address, type, and status.

The 🔍 Search box can be used to search for a specific connection by Connection IP or Type.

Dashboard

The Dashboard screen presents an overview of the Lock Systems in your Working Region, using graphs, charts, and other elements to show region and system status details.

📖 Topics:

- ◆ Status ◆ Battery Levels ◆ Firmware Levels ◆ eBox Connection Status
- ◆ Critical Audits ◆ Bolt Status

Dashboard - Status

To configure what is being displayed on the Dashboard screen, click the list icon 📋 , then select one of the following options from the drop-down menu to configure what is being displayed on the Dashboard screen:

- **All** - will display Battery Levels, eBox Connection Status, Critical Audits, and Firmware Versions (Lock, Keypad, eBox) for all Lock Systems in your Working Region.

- **Battery Levels** - will display battery and power information for all Lock Systems in your Working Region.

- **Firmware Levels** - will display the firmware levels (Application and Bootloader) for all system components in your Working Region (locks, keypads, eBoxes) so that, at a glance, you can quickly determine how many devices need updating.

- **eBox Connection Status** - will list all the Lock Systems in your Working Region, and indicate the status of each of the system's eBoxes (Online/Offline)

- **Critical Audits** - will allow you to monitor a set number of user selected audits

- **Bolt Status** - will allow you to view the status of the Bolt for each of the locks in your system

If you wish to view the details for any of the status screens, click on the view 👁 (eye) icon.

Dashboard Status - Battery Levels

about the Dashboard's "Battery Levels" view (click to expand)

With "Battery Levels" selected, you can view the Battery Status, Power Percent, Power Type, and Voltage for each of the Lock Systems in your Working Region.

"**Battery Status**" categories > Good 🟩, Low 🟨, Critical 🟥, Unknown 🟦

"**Power Type**" categories > Power Line, Battery, Ethernet, Unknown

You can click on any of the chart headings to list the data by ascending/aphabetical or descending/reverse-alphabetical order based on the heading you click. The blue triangle/arrow will appear above the heading to indicate how the data is being displayed. Clicking a heading once will list the information in ascending/alphabetical order, as indicted by the up arrow 🔺. Clicking the heading again will list the information in

descending/reverse alphabetical order, as indicated by the down arrow ▼.

If you wish to view and configure the lock system details, click on the lock system's corresponding view 👁
(eye) icon located under the "Action" heading. Refer to Lock Systems for more details.

Dashboard Status - Firmware Levels

about the Dashboard's "Firmware Levels" view (click to expand)

With "Firmware Levels" selected, the Dashboard provides a more comprehensive breakdown of device firmware of all devices within the lock systems that are part of the Working Region.

Click on one of the three tabs on the top of the screen to view the Firmware Levels for that specific device type (Lock, Keypad, or eBox).

The graphs will display Application firmware in Blue ■, and Bootloader firmware in Green ■

You can click on any of the chart headings to list the data by ascending/aphabetical or descending/reverse-alphabetical order based on the heading you click. The blue triangle/arrow will appear above the heading to indicate how the data is being displayed. Clicking a heading once will list the information in ascending/alphabetical order, as indicted by the up arrow ▲. Clicking the heading again will list the information in descending/reverse alphabetical order, as indicated by the down arrow ▼.

If you wish to view and configure the lock system details, click on the lock system's corresponding view 👁
(eye) icon located under the "Action" heading. Refer to Lock Systems for more details.

Dashboard Status - eBox Connection Status

about the Dashboard's "eBox Connection Status" view (click to expand)

With "eBox Connection Status" selected, the Dashboard will list all the Lock Systems that are part of the Working Region and indicate the status off each system's eBox (Online/Offline).

eBox "**Status**" categories > Online ■, Offline ■, Unknown ■

You can click on any of the chart headings to list the data by ascending/aphabetical or descending/reverse-alphabetical order based on the heading you click. The blue triangle/arrow will appear above the heading to indicate how the data is being displayed. Clicking a heading once will list the information in ascending/alphabetical order, as indicted by the up arrow ▲. Clicking the heading again will list the information in descending/reverse alphabetical order, as indicated by the down arrow ▼.

If you wish to view and configure the connection details for a lock system's eBox, click on the lock system's corresponding view 👁 (eye) icon located under the "Action" heading. Refer to Lock Systems for details regarding how to configure your lock system and eBox settings.

Dashboard Status - Critical Audits

about the Dashboard's "Critical Audits" view (click to expand)

Critical Audits Filter - when you click the Filter icon ∇ , the screen expands to reveal a list of Audit types. Use the sliders next to each Audit type to select the ones you wish to view in the Dashboard. Audits that are not selected will have grey slider icons next to their respective names ⬤━ . To choose an Audit type, click the associated slider icon to move the slider to the right so that it turns blue ━⬤ . When you're done selecting Audits, click the "Apply" button to view the chosen Audits on the Dashboard graphic. Clicking the "Default" button will set the Critical Audits filter to display the default audits only.

You can click on any of the chart headings to list the data by ascending/aphabetical or descending/reverse-alphabetical order based on the heading you click. The blue triangle/arrow will appear above the heading to indicate how the data is being displayed. Clicking a heading once will list the information in ascending/alphabetical order, as indicted by the up arrow ▲. Clicking the heading again will list the information in descending/reverse alphabetical order, as indicated by the down arrow ▼. The chart data can also be ranked by clicking the list icon ▤ then selecting one of the available categories.

With "Critical Audits" selected, the Dashboard screen will display a set number of user selected audits. This allows for close monitoring of audits that the user/administrator deems to be of high importance.

 If you wish to view and configure the lock system details, click on the lock system's corresponding view 👁 (eye) icon located under the "Action" heading. Refer to Lock Systems for more details.

Dashboard Status - Bolt Status

about the Dashboard's "Bolt Status" view (click to expand)

With "Bolt Status" selected, you can view the Bolt state every lock for each of the Lock Systems in your Working Region.

"**Bolt Status**" categories > Bolt Closed ▮, Bolt Open ▮, Unknown ▮

You can click on any of the chart headings to list the data by ascending/aphabetical or descending/reverse-alphabetical order based on the heading you click. The blue triangle/arrow will appear above the heading to indicate how the data is being displayed. Clicking a heading once will list the information in ascending/alphabetical order, as indicted by the up arrow ▲. Clicking the heading again will list the information in descending/reverse alphabetical order, as indicated by the down arrow ▼.

If you wish to view and configure the lock system details, click on the lock system's corresponding view 👁 (eye) icon located under the "Action" heading. Refer to Lock Systems for more details.

Registration

The Registration screen is where all License and Customer Information needs to be entered so that you can register your software. Before registering your Apexx Series Software and validating your software license, "Registration" is the only menu option available.

Upon successful completion of the registration process, all of the Apexx Series Software tools will be accessible (see Main Menu for details).

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

◆ Obtaining your Software Licence File ◆ Importing the License File

◆ Registering your Software Licenses ◆ Registering using Registration File ◆ Registering by Phone

◆ Online Registration ◆ eBox Licenses ◆ Assignable Licenses ◆ Manually Assigning a License

◆ Consolidate Licenses

Obtaining your Software Licence File

1. After purchasing one or more Apexx Software Licenses, you will receive an email that includes your software license serial number(s) and a one-time download link with password to obtain your license file.

2. Click the hyperlink in the email. This will open your web browser and take you to the registration file download page.

3. On the file download page, enter the password that was provided in the registration email and click "Continue"

4. Click the "Download" button to download the .dkr license file.

Importing the License File

1. From the main menu, click Registration

2. On the Registration screen, click the ⬇ Import button, then select "License file".

3. In the file explorer window, select the .dkr license file, then click "Open". If you don't have a license file, please see Obtaining your Software Licence File.

Note: Once imported, the software goes into "Trial mode" which allows you to access all the software features for 60 days. You must complete your registration within this 60 day window.

Registering your Software Licenses

There are multiple ways of registering your licenses:

- "Offline" Registration methods (no active internet connection required)
    ◦ Method 1 - Registration using Registration File
    ◦ Method 2 - Registration by Phone
- "Online" Registration method (internet connection required)

Registering using Registration File

To register your licenses using the registration file, open Apexx Series Software and do the following:

Note: Before beginning this process, please ensure that the licenses that you wish to register have been saved in the system

1. First, you must Import your license file (see Importing the License File for details)

2. If you are using an eBox License, use the "Region" drop-down menu and select the region that the eBox license(s) will be applied to.

3. Fill in "Registered To" field, then click the ⬆ Export button.

4. Once you obtain your exported file, send file to dormakaba (Commercial.Safe.Lock.Orders.AMER@dormakaba.com). You will be emailed a Registration file to complete the registration process.

    5. Once you have received the Registration file, return to the Registration screen in Apexx Series Software, then click the ⬇ Import button and select "Registration file" to complete the registration process.

Once registered, you will have full access to Apexx Series Software's features.

Registering by Phone

To register your licenses by phone, open Apexx Series Software and do the following:

1. From the main menu, click Registration.

2. On the Registration screen, click the "Generate Machine Code" button.

3. Click "Yes" in the popup window to allow the software to generate the machine code. The machine code will appear next to the "Generate Machine Code" button on the Registration screen.

4. Call the dormakaba registration phone number **(888-950-4715)**. You will be asked to provide the following information:

   • Machine Code (see previous steps)

   • Your Apexx License Serial Number(s)

   The dormakaba customer service representative will supply you with License Activation codes needed to complete your product registration.

5. Return to the Registration page in Apexx Series Software and click the "Licenses" heading.

6. In the table on the left side of the screen, click the license type that you have, or click the "Add" icon to add a new license type.

7. With the license type highlighted (text should appear Blue) Under "Details", enter the License Serial Number and the corresponding Activation Code, then click the "Save" button to register.

8. If you are using an eBox License, use the "Region" drop-down menu and select the region that the eBox license(s) will be applied to.

9. Repeat steps 6 and 8 for all other licenses you want to register.

Once registered, you will have full access to Apexx Series Software's features.

"Online" Registration

coming soon

About eBox Connection Seats and eBox Licenses

When working with eBoxes and eBox Licenses, please be aware of the following:

• eBoxes require an available, active network connection to communicate with Apexx Series Software.

• eBox Connection Seats allow you to use your eBox to connect and communicate with Apexx Series Software.

• The eBox Connection Seats are purchased as licenses. For example, if you purchase an "Apexx eBox 5 Pack" license, this license includes 5 eBox Connection Seats.

• eBox Licenses must be assigned to a region. All seats associated with that license will belong to the region the license is assigned to.

• eBoxes **cannot** use an eBox Connection Seat that is assigned to another region. It is important that you assign the appropriate eBox license pack(s) for your region(s) and the eBox(es) that are expected to be used by each region.

- When adding/commissioning an eBox, the system checks to see if there are any available eBox Connection Seats. If there are no seats available, the commissioning process will fail.

- If your eBox license expires, the eBox will no longer connect and communicate with Apexx Series Software.

- "Assignable licenses" are the connection seats that are assigned to eBoxes to allow them to connect.

Assignable Licenses

The "Assignable Licenses" section of the Registration screen allows you to assign and manage certain assignable Apexx licenses. Apexx eBoxes are automatically assigned an eBox connection seat when they are added/commissioned, but they can be reassigned using the "Assignable Licenses" screen.

Reassigning a License

To manually assign a license to an eBox, do the following:

1. From the main menu, click Registration.

2. On the Registration screen, click "Assignable License".

3. Click an eBox license from the list on the left side of the screen. If you have a multi eBox license (5, 10, 25, or 50 Pack), click the license on the list so that it expands allowing you to click one of the individual licenses.

4. With a license selected, assign an eBox to the license by completing the following details:

    - **eBox MCU** - use the drop-down menu to select an eBox. This list consists of eBoxes that have already been added to your system (see Add Devices for information regarding adding an eBox/Lock System). Once selected, the slider icon next to this license will turn blue and move to the right , indicating the license is assigned.

5. Click the "Save" button to confirm the license assignment.

Consolidate Licenses

The "Consolidate Licenses" feature allows you to assign and reassign all of your eBox licenses with the single click of a button. You can use this to assign your licenses initially or reassign licenses later in a way that efficiently uses your purchased licenses.

For example, let's say you've purchased an "Apexx eBox 5 Pack" and an "Apexx eBox 10 Pack", but are only using 9 eBoxes. If you have licenses from the 5-Pack and the 10-Pack assigned to eBoxes, clicking the "Consolidate Licenses" button will reassign and redistribute your purchased licenses automatically. In this example, all assigned licenses would be taken from the "Apexx eBox 10 Pack", which would free up the "Apexx eBox 5 Pack" licenses. This is a convenient tool for when it comes time to renew your licenses, as you may discover that you have more licenses than you actually require.

Locks

This menu contains all software-based Lock related tools for managing Lock Systems that utilize the Apexx eBox for live networked connectivity, including the ability to Add/Commission devices, manage Lock Groups, Lock system Programming, and User Role management.

Also contained within this menu is "USB Communication", which contains the tools required to setup and configure lock systems using a USB connection to temporarily connect and configure the settings of a Lock System that does not include the Apexx eBox.

Follow the links below for details about each of the following Lock screens:

Lock Systems

Add

Devices

Lock

Groups

Roles

USB Communication

Lock Systems

This screen contains a list of all Lock Systems within your selected Region. After adding/commissioning a new Lock System, you can use the Lock Systems page to configure the system, devices, access settings, and view/retrieve audits.

NOTE: The tools contained within the Lock Systems screens are for use with systems that utilize the Apexx eBox, which allows you to connect your lock system to your secure computer network. If your system does not include the Apexx eBox, you can still connect to the Apexx Series Software using a USB cable. To connect, setup, and configure a lock system using a USB connection, refer to USB Communication.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

- ◆ Adding/Commissioning a New Lock System ◆ Lock Systems list ◆ Searching/Filtering the Lock Systems list
- ◆ Displaying/Navigating the Lock Systems list ◆ Editing a Lock System ◆ System Configuration
- ◆ Device Configuration ◆ Assignments ◆ Audits ◆ Deleting a Lock System
- ◆ Manually Programming your Lock System ◆ Updating your device firmware

Adding/Commissioning a New Lock System

See Add Devices

Lock Systems list

The Lock Systems list includes the list of all Lock Systems within the selected Region, with details concerning how many locks 🔒, keypads ⌨, and eBoxes ▭ are part of a given Lock System.

Searching/Filtering the Lock Systems list

There are three useful tool icons located at the top of the list of Lock Systems that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon ▤ to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the Lock Systems in ascending ▲ or descending ▼ order based on the chosen Sort Category.

Filter - when you click the Filter icon ▽ , the screen expands to reveal a series of text fields and drop-down fields. You can use one or multiple of these fields to filter the data in the Lock Systems list. Click the Filter icon again to close the filter.

- • Name - use this text field to enter a Lock System name, or a partial name ("Building 1", or just "Building", "1", "B", etc.)

- Time Zone - use the drop-down menu and select from the list of Time Zones.

- Support Contact - use this text field to enter a Support Contact name, or a partial name

- Confirmation Window - use the drop-down menu and select values for Hours and Minutes

- Immediate Time Lock Max - use the drop-down menu and select values for Days, Hours, and Minutes

- Lag Time - use the drop-down menu and select values for Minutes and Seconds

- Daylight Savings - use the drop-down menu and select from Any, Observed, and Not Observed

- Duress - use the drop-down menu and select from Any, Enabled, or Disabled

- " Include regions above" - Click the slider icon to show Lock Systems that belong to any parent regions. When enabled, the slider will be blue and to the right .

- " Include regions below" - Click the slider icon to show Lock Systems that belong to any child/sub-regions. When enabled, the slider will be blue and to the right .

- "Apply" button - click this button to apply your filter criteria to the list of Lock Systems

- "Reset" button - click this button to clear your filter criteria

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to Reset the filter to see the full list of Lock Systems

Displaying/Navigating the Lock Systems list

There are additional tool icons and buttons located at the bottom of the list of Lock Systems that allow you to modify how the data in the list is presented:

Rows Per Page - click the drop-down menu to select the number of rows of data you want displayed per page.

First Page - click the button to navigate to the first page of data.

Previous Page - click the button to navigate to the previous page of data.

Next Page - click the button to navigate to the next page of data.

Last Page - click the button to navigate to the last page of data.

Editing a Lock System

To Edit a Lock System, do the following:

1. From the main menu, click Locks > Lock Systems
2. From the Lock System Search screen, locate the name of the Lock System you want to edit, and click the Edit button (pencil).
3. Edit the any fields you want to change.
4. After making changes to a Lock System, click the Save button to store the changes.

The Lock Systems screen contains the following pages, each of which has several configurable fields: System Configuration, Device Configuration, Assignments, and Audits.

System Configuration

about "System Configuration" details (click to expand)

The System Configuration screen contains the basic configuration settings for you Lock system.

The System Configuration screen has the following fields/settings:

- **Name** - enter a name into this field for system identification purposes
- **Support Contact** - enter any relevant support contact names or information in this field
- **Time Zone** - Use the drop-down menu to select a Time Zone for your system
- **DST Observed** - click this slider to enable/disable the observance of Daylight Savings Time. DST is observed when the slider is blue and to the right

- **Time Format** - choose between on of the following formats:
  - "12 Hour" - HH:MM AM/PM
  - "24 Hour" - HH:MM
- **Date Format** - choose from one of the following formats:
  - MM/DD/YYYY
  - DD/MM/YYYY
  - YYYY/MM/DD
- **During Bolt Open** - This defines the behavior of the keypad when the bolt is open. Use the drop-down menu to select from one of the following:
  - "No Action"
  - "Beep Only"
  - "Notify Only"
  - "Beep + Notify"
- **During Door Open** - This defines the behavior of the keypad when the door is open. Use the drop-down menu to select from one of the following:
  - "No Action"
  - "Beep Only"
  - "Notify Only"
  - "Beep + Notify"
- **During Confirmation Window** - This defines the behavior of the keypad during a Confirmation Window. Use the drop-down menu to select from one of the following:
  - "No Action"
  - "Beep Only"
  - "Notify Only"
  - "Beep + Notify"

- **During Time Delay** - This defines the behavior of the keypad during a Time Delay event. Use the drop-down menu to select one of the following:
  - "No Action"
  - "Beep Only"
  - "Notify Only"
  - "Beep + Notify"
- **Buzzer Volume** - This refers to the Buzzer used to provide user feedback at the keypad. Use the drop-down menu to set the buzzer volume on a scale of 0 to 5 (0 = off, 5 = loudest)
- **Display Brightness** - This refers to the brightness of the keypad Display screen. Use the drop-down menu to set the Display screen brightness on a scale of 1 to 5 (1 = dimmest , 5 = brightest)
- **Keypad Brightness** - This refers to the brightness of the illuminating keys of the keypad. Use the drop-down menu to set the Display screen brightness on a scale of 0 to 5 (0 = off , 5 = brightest)
- **Duress Enabled** - click this slider to enable/disable the Duress feature for your system. Duress is enabled when the slider is blue and to the right.
- **Countdown** - used to control how the remaining time in a time delay / time lock period is displayed on screen
  - "Disabled" - no count is displayed
  - "Down" - the count is displayed starting from the time delay (or time lock) value and counts down to zero
  - "Up" - the count is displayed starting from zero and going up until the time delay (or time lock) value is reached
- **Confirmation Window** - After a time delay period has expired, the lock enters the Confirmation Window, during which a valid credential can be entered to open the lock. Use the drop-down menu to set the Confirmation Window length in minutes and seconds. The Confirmation window can be given a value anywhere from 1-minute to 4-hours 15-minutes.
- **Immediate Time Lock Max** - this setting allows the user to define the maximum value for the Immediate Time Lock setting. Use the drop-down menu to set its value in days, hours, and minutes.
- **Lag Time** - If using Sequential Open, the Lag time is the amount of time between the unlocking of the primary lock and the unlocking of the other lock. Use the drop-down to select the Minutes and Seconds.
- **Sequential Open** - this allows you to set up multiple locks to open sequentially with a single unlock command. When configured, the Primary lock will open, followed by a defined "Lag Time" period, then another lock will open. Click the slider to enable/disable Sequential Open. Sequential Open is enabled when the slider is blue and to the right

Device Configuration

about "Device Configuration" details (click to expand)

The Device Configuration screen contains a list of all system devices and allows you to configure all device-specific settings via software.

All devices in the lock system are listed on the left-side of the screen. You can use the ⌃ ⌄ arrows next to the device type name to expand or contract the list for that device type.

To view the configuration details of any device, simply click a device from the list. The Device Configuration details for each device type are described below:

"Lock" Details

- **Name** - enter a name into this field for Lock identification purposes
- **Serial Number (MCU ID)** - The MCU ID of the Lock. This will be populated automatically when a lock is added.
- **Model** - lists the lock model type (Motorized Deadbolt, Motorized Slam/Latchbolt, etc.)
- **Schedule** - Use the drop-down list to select one of the available Schedules, or leave unassigned.
- **Opening Time Delay** - If a Time Delay has been applied to the lock, the Opening Time Delay is the period of time between when a valid credential is received at the keypad and when the lock can be accessed. Once this delay period is over, the Confirmation Window begins. The Opening Time Delay can be given a value anywhere from 0-minutes (disabled) to 4-hours 15-minutes. Use the drop-down menu to set this value in hours/minutes.
- **Duress Opening Time Delay** - this is similar to Opening Time Delay, but is utilized when Duress is enabled. Use the drop-down menu to set this value in hours/minutes.
- **Bank Opening Dual Mode** - Use the drop-down menu to select one of the following options.
  - "Not Enabled"
  - "Any 2"
- **Remote Disabled** - When a signal is sent to the lock using a lock input configured for this feature, the lock can not be opened. Enable/disable the Remote Disabled feature by clicking this slider. This feature is enabled when the slider is blue and to the right ⬤.
- **Configurable I/O table** - Allows you to configure the Inputs and Outputs for the Lock System Devices (Locks, eBoxes)

"eBox" Details

- **Network Mode** - use the drop-down menu to select one of the following options:
  - DHCP
  - Static
- **IP Address** - enter the IP address of your eBox in the space provided
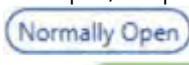
○ **Subnet Mask** - enter the Subnet Mask in the space provided

○ **Gateway** - enter your network's Gateway address in the space provided

○ **Connection Mode** - use the drop-down menu to select one of the following options:

▪ Disconnected

▪ Local Server

○ **Serial Number (MCU ID)** - The MCU ID of the eBox. This will be populated automatically when the eBox is added/commissioned.

○ **Local Server Endpoint** - enter the IP address of your computer/server in the space provided

○ **Commissioning Port** - enter the port number to be used during the Commissioning process

○ **MQTT Broker Port** - enter the port number to be used by the MQTT Broker (Message Queuing Telemetry Transport)

○ **Preferred DNS** - enter your Preferred DNS (Domain Name System) address in the space provided

○ **Alternate DNS** - enter an Alternate DNS (Domain Name System) address in the space provided

○ **Claim Code** - use this claim code in the commissioning process (see Add Devices)

Using the Configurable I/O Table

You can sort the device I/Os in ascending or descending order by clicking the "I/O" heading. A blue arrow will appear above the heading indicating the direction in which the devices have been sorted (▲ ▼).

To configure what each of the I/O are to be used for, click the Edit button (pencil) in the row of the table corresponding to the I/O you wish to configure.

Configure the behavior of the Input/Output by clicking the Normally Open / Normally closed button to toggle between the two states. indicates that the Input/Output will be open when the device is in its normal de-energized state, and indicates that the Input/Output will be closed when the device is in its normal de-energized state.

Click the slider next to the option you wish to enable so that the slider moves to the right and turns blue , then click the Save button to store the change.

Configurable Input Options

• **Remote Disabling** - if this signal is asserted, the associated lock cannot be opened.

• **Door Contact** - the input will act as the door contact associated with the lock. It will determine the open/closed state of the safe door.

• **Skip Time Delay** - if this signal is asserted, you can skip the Time Delay period for the associated lock.

Note: To skip the Time Delay period, this signal must be asserted prior to beginning the lock opening process.

Configurable Output Options

- **Lock Open** - when the associated lock is open, the output relay will open or close depending on how the output relay contact is configured.
- **Time Delay Counting** - when the lock's time delay period starts, the relay will open or closed depending on how the relay contact has been configured. The relay will return to its normal state when the Time Delay period has ended.
- **Confirmation Window Count** - When the lock's Time Delay period ends, the Confirmation Window begins and the relay will open or close depending on how the relay contact has been configured. The relay will return to its normal state when the Confirmation Window has ended.
- **Duress Code** - this output will be triggered when a Lock User enters a Duress Code at the keypad.

Assignments

about "Assignments" details (click to expand)

The Assignments page allows you to take the Lock Groups, Roles (Lock User), Schedules, and Holidays that you've created using Apexx Series Software and apply them to your Lock System.

Simply use the drop-down lists under each respective heading to apply the chosen Lock Groups, Roles, Schedules, and Holidays to your Lock System.

- **Lock Groups** - a system can have up to 10 Lock Groups. See Lock Groups for more information.
- **Roles** - a system can have up to 10 different Lock User Roles. This includes the 3 default roles (Administrator, Manager, User) and up to 7 custom user roles. See Roles for more information.
- **Schedules** - a system can have up to 5 schedules. See Schedule Management for more information.
    - When you select a Schedule from the drop-down list, a window will open allowing you to assign the chosen Schedule to one or more locks. Click the slider next to the lock(s) you wish to enable so that the slider moves to the right and turns blue ⬤, then click the Apply button.
- **Holidays** - a system can have up to 25 Holidays. See Holiday Management for more information.

Audits

about "Audits" (click to expand)

The Audits screen allows you to retrieve Audits from your devices via a USB or Network connection, which you can view and save/backup to your computer for storage purposes. To access system Audits, do the following:

1. From the main menu, click Locks > Lock Systems
2. From the Lock System Search screen, locate the name of the Lock System you want to audit, and click the Edit button 🖊 (pencil).
3. Click "Audits" to open the Audits screen. ⬇

4. Click the "Download Audits" button   .

5. In the Audits window, use the following tools to specify how you'd like to retrieve the audits:

   - **Connection Type** - use this drop-down menu to select your connection type (USB or Network)

   - **Audit Table** - use this drop-down menu to select an Audit Table (Main or Firmware)

   - **All Audits/Number of Audits** - when the All Audits slider is blue and to the right, all of the audits will retrieved from the Lock System. Alternatively, you can click the slider icon so that it moves to the left and turns grey   . A text box will appear that will allow you to enter the number of audits to retrieve from the system (most recent).

   - **Devices to Audit** - contains a list of all locks in the system. Use the sliders next to each of the respective lock names to select which locks to audit. To audit one or more locks, click the slider next to each lock you want to audit so that the slider moves to the right and turns blue   .

6. Ensure your lock system is connected to your computer (via USB or Network), then click the "Get Audits" button.

NOTE: if retrieving audits via USB, ensure that the USB connection from the Keypad is enabled using "PC Connect"   from the Keypad menu.

Viewing Audits - Using the Audits Filter

The list of Audits can be filtered to customize which Audits appear in the Audits list. The filter settings also determine which Audits appear when you generate an Audit Report.

When you click the Filter icon   , the screen expands to reveal a series of text fields and drop-down fields. You can use one or multiple of these fields to filter the Audit data you see on screen. Click the Filter icon again to close the filter.

   - **Sequence** - use this text field to enter the numeric sequence corresponding to the Audit you wish to view (1 being the first Audit event in the sequence of Audits you downloaded from your Lock System)

   - **Device** - use this text field to enter a Device name, or a partial name ("Lock1", or just "Lock", "1", "L", etc.)

   - **Device Number** - *coming soon*

   - **Event** - click the checkbox so that a blue check-mark   appears next to one or more Event Type that you wish to be included.

   - **Primary User#** - use this text field to Enter a User ID number. **NOTE:** This field only applies to certain Audit types, such as "Bolt Open".

   - **Secondary User#** - use this text field to Enter a User ID number. **NOTE:** This field only applies to certain Audit types, such as "Bolt Open" when Dual Mode is being used in a Lock System.

   - **Date Range** - set a start and end date by clicking the corresponding calendar icon   then use the interactive calendar to select a date. Use the   arrows to navigate to the appropriate month, then click the calendar to select a specific day for both your "Start" and "End" dates.

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to clear the filter to see the full list of Audits. To do this, click the "Reset" button.

Viewing Audits - Sorting/Ranking the Audits List

 If you click certain table headings, you can sort/rank the data ascending (arrow pointing up ▲) or descending (arrow pointing down ▼) numerically or alphabetically. Click the column heading to toggle between the different sorting methods

Viewing Audits - Generating an Audit Report

After using the filter and sorting tools to arrange your Audit data, click the "View Report" button to generate an Audit Report.

For more information on Generating Reports, see the Reports and Audit Report sections.

Displaying/Navigating the Audits list

There are additional tool icons and buttons located at the bottom of the list of Audits that allow you to modify how the data in the list is presented:

Rows Per Page - click the drop down menu to select the number of rows of data you want displayed per page.

First Page - click the button to navigate to the first page of data.

Previous Page - click the button to navigate to the previous page of data.

Next Page - click the button to navigate to the next page of data.

Last Page - click the button to navigate to the last page of data.

Deleting a Lock System

To Delete a Lock System do the following:

1. From the Lock Systems screen, locate the name of the Lock System you want to delete, then click the

    Delete button   (trashcan)

2. Confirm that you want to delete the Lock System by clicking the "Yes" button in the Delete Confirmation popup window.

Manually Programming your Lock System

Program

While all Lock System changes are pushed to the Lock System automatically when the system is connected via the eBox, all Keypad, Lock, eBox, and system configuration information can be programmed manually to the connected lock system simultaneously by clicking the "Program" button, found on the Lock Systems details screen. This can be useful in cases where your lock system was offline for some reason, and you want to ensure all configuration changes have been pushed to the devices.

To manually program your lock system, do the following:

1. Click the "Program" button

2. Several messages will appear onscreen, detailing the progress of the programming and synchronizing of all connected devices. After a few seconds, these messages will disappear, indicating that the programming process is complete.

Updating your device firmware

Update Firmware

Keypad, Lock, and eBox firmware can be updated using the "Update Firmware" button, found on the Lock Systems details screen.

To perform a Firmware update, do the following:

1. From the main menu, click Locks > Lock Systems
2. From the Lock System   Search screen, locate the name of the Lock System whose device firmware you want to update, and click the Edit button(pencil).

3. Click the "Update Firmware"   icon, located at the top right of the screen.
4. In the Firmware Update window, use the drop-down menu to select your Connection type (Network, or USB).
5. In the Firmware Update window, use the drop-down menu to select your the "Firmware File" (the .zip folder containing the firmware files). If your firmware file does not appear in the list, navigate to the Firmware Management screen to manage your firmware files.
6. Click the "Update Firmware" button. The Firmware Update process will begin, and will conclude after several seconds (the time will vary depending on the size of your lock system).

Add Devices

The Add Devices screen is where you go to add/commission new Lock Systems. This section outlines all steps involved in this process.

NOTE: The sections that follow outline how to connect and add lock systems using a network connection utilizing the eBox hardware. To setup and connect a lock system using a USB connection, refer to USB Communication.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

- ◆ Getting Started ◆ Select a Region ◆ Keypad Setup - Network and End Point
- ◆ Software Setup - Claim Code ◆ Keypad Setup - eBox Activation
- ◆ Software Setup - Commission Request Acknowledgement

Add Devices - Getting Started

Please observe the following prior to commissioning a new device:

- Ensure that all system components (Keypad, locks, eBox, etc.) are powered and connected on the CAN bus prior to beginning the Commissioning process.
- Before connecting your lock system to the computer/software, commission your lock system and connect all of its components as outlined in the Axessor Apexx Installation Guide.
- Ensure that the proper date and time are set on your keypad.
- **Note:** During the process of eBox commissioning to the Software, it is the user's responsibility to make sure that the network used for the first contact between eBox and Software is secure.

Select a Region

Using Apexx Series Software, perform the following steps:

1. Click the arrow icon → in the top-left corner of the screen to open the list of Regions, then double click one of the Regions in the list to select it.
2. Return to the Add Devices page by using the side menu by clicking "Locks" > "Add Devices".

Add Devices - 1) Keypad Setup - Network and End Point

At the Keypad, perform the following steps:

1. From the Advanced Menu, select the **"Network"** icon and press the Enter key .

2. Highlight the word **"Enable"**, then press the Enter key .

3. To enable network connectivity, use the directional arrows to highlight **"On"**, then press the Enter key

4. Use the directional arrows to highlight **"Save"**, then press the Enter key .

5. From the Network menu, select **"View/Configure"** , then press the Enter key .

6. Verify that the network configuration details are identical to those entered previously using the software. To change a setting, simply highlight it, press the Enter key , then use the numeric keypad to enter the correct information.

7. From the Network menu, select **"End Point"** (your communication server), , then press the Enter key.

8. In the End Point sub-menu, select **"Edit Local End Point"**, then press the Enter key .

9. Use the numeric keypad to enter the Local End Point IP address of your communication server. Use the Enter key to advance to the next portion of the address. If you make a mistake, use the back button to go back and make changes.

10. For the **"Commissioning Port"**, set it to **5001** then press the Enter key .

11. For the **"MQTT Broker Port"**, set it to **8883** then press the Enter key .

12. From the End Point sub-menu menu, select **"Mode"** (your communication server), then press the Enter key .

13. To set your Connection Mode, highlight **"Local Server"** , then press the Enter key .

14. Use the directional arrows to highlight **"Save"**, then press the Enter key .

Add Devices - 2) Software Setup - Claim Code

Using Apexx Series Software, perform the following steps:

1. From the Apexx Series Software menu, click "Locks" > "Add Devices".

2. The Add Devices screen has a list of "Pending Commission Requests". Write down the eight-digit "Claim Code" written on this screen. **The Claim Code will need to be entered at the Keypad in a future step.**

Add Devices - 3) Keypad Setup - eBox Activation

At the Keypad, perform the following steps:

1. In the End Point sub-menu, select **"Activate EBox"**, then press the Enter key .

2. Enter the Claim Code (recorded earlier), then press the Enter key . **"Activation started"** should appear on the keypad display screen. Press the Enter key to continue.

Add Devices - 4) Software Setup - Commission Request Acknowledgement

Using Apexx Series Software, perform the following steps:

1. On the "Add Devices" screen, hit the refresh button located next to the "Pending Commission Requests" heading. If all previous steps were done correctly, your lock system should appear in the list of Pending Commission Requests.

2. Locate your lock system in the list, then click the check mark (under the "Action" column).

3. From the Apexx Series Software menu, click "Locks" > "Lock Systems". Your lock system should now appear in the "Lock System Search" list.

4. You can now use the software to configure and edit your lock system settings. See Lock Systems for details.

Lock Groups

Lock Groups can be created and assigned to lock systems as a means of categorizing groups of locks by function, location, or some other method.

One or more Lock Users can be assigned to these groups by assigning them a Lock Group in their Lock User profile (see Lock Users for details).

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

◆ Creating a New Lock Group ◆ Editing a Lock Group ◆ Deleting a Lock Group

◆ Searching/Filtering the Lock Groups list ◆ Displaying/Navigating the Lock Groups list

Creating a New Lock Group

To create a new Lock Group, do the following:

1. From the main menu, click Locks > Lock Groups
2. From the Lock Groups screen, click the Add icon ➕ located at the bottom of the screen.
3. In the field provided, enter a name for the Lock Group.
4. Click the Save button to create the new Lock Group.

Editing a Lock Group

To edit/rename a Lock Group, do the following:

1. From the main menu, click Locks > Lock Groups
2. From the Lock Groups screen, locate the name of the Lock Group you want to edit, and click the Edit button 🖉 (pencil).
3. Edit the Lock Group "Name" field.
4. After making changes to a Lock Group, click the Save button to store the changes.

Deleting a Lock Group

To Delete a Lock Group, do the following:

1. From the main menu, click Locks > Lock Groups
2. From the Lock Groups screen, locate the name of the Lock Group you want to delete, then click the Delete button 🗑 (trashcan)
3. Confirm that you want to delete the Lock Group by clicking the "Yes" button in the Delete Confirmation popup window.

Searching/Filtering the Lock Groups list

There are three useful tool icons located at the top of the list of Lock Groups that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the Lock Groups in ascending ▲ or descending ▼ order based on the chosen Sort Category.

Filter - when you click the Filter icon , the screen expands to reveal a series of text fields and drop-down fields. You can use one or multiple of these fields to filter the data in the Lock Systems list. Click the Filter icon again to close the filter.

- Name - use this text field to enter a Lock Group name, or a partial name ("Main Vault", or just "Main", "M", "V", etc.)

- " Include regions above" - Click the slider icon to show Lock Groups that belong to any parent regions. When enabled, the slider will be blue and to the right.

- " Include regions below" - Click the slider icon to show Lock Groups that belong to any sub-regions. When enabled, the slider will be blue and to the right.

- "Apply" button - click this button to apply your filter criteria to the list of Lock Systems
- "Reset" button - click this button to clear your filter criteria

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to Reset the filter to see the full list of Lock Systems

Displaying/Navigating the Lock Groups list

There are additional tool icons and buttons located at the bottom of the list of Lock Groups that allow you to modify how the data in the list is presented:

Rows Per Page - click the drop-down menu to select the number of rows of data you want displayed per page.

First Page - click the button to navigate to the first page of data.

Previous Page - click the button to navigate to the previous page of data.

Next Page - click the button to navigate to the next page of data.

Last Page - click the button to navigate to the last page of data.

Roles

User Roles are divided into three major types: Administrator, Manager, and User. Each User created in the system is assigned one of these roles, which grants them a defined set of abilities for system access and administration.

Note: The Administrator, Manager, and User role types are all pre-defined. You can not edit their permissions. In addition to these three default roles, you can create custom User Roles using the Apexx Series Software.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

- ◆ Searching/Filtering the Roles list ◆ Displaying/Navigating the Roles list
- ◆ Viewing Permissions of Default User Roles ◆ Creating Custom User Roles ◆ Editing Custom User Roles
- ◆ Deleting a User Role ◆ Applying User Roles

Searching/Filtering the Roles list

There are three useful tool icons located at the top of the list of Roles that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon 📋 to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the Roles in ascending ▲ or descending ▼ order based on the chosen Sort Category.

Filter - when you click the Filter icon ▽ , the screen expands to reveal a series of text fields and drop-down fields. You can use one or multiple of these fields to filter the data in the Roles list. Click the Filter icon again to close the filter.

- Name - use this text field to enter a Role name, or a partial name ("Junior Manager", or just "Manager", "J", "M", etc.)

- Type - use the drop-down menu and select from Administrator, Manager, or User.

- Default - use the drop-down menu and select from Any, Active, or Inactive.

- " ⬜ Include regions above" - Click the slider icon to show Roles that belong to any lock systems in parent regions. When enabled, the slider will be blue and to the right 🔵 .

- " ⬜ Include regions below" - Click the slider icon to show Roles that belong to any lock systems in sub-regions. When enabled, the slider will be blue and to the right 🔵 .

- "Apply" button - click this button to apply your filter criteria to the list of Lock Systems

- "Reset" button - click this button to clear your filter criteria

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to Reset the filter to see the full list of Roles

Displaying/Navigating the Roles list

There are additional tool icons and buttons located at the bottom of the list of Roles that allow you to modify how the data in the list is presented:

Rows Per Page - click the drop-down menu [▾] to select the number of rows of data you want displayed per page.

First Page - click the [«] button to navigate to the first page of data.

Previous Page - click the [‹] button to navigate to the previous page of data.

Next Page - click the [›] button to navigate to the next page of data.

Last Page - click the [»] button to navigate to the last page of data.

Viewing Permissions of Default User Roles

To view the details regarding the permissions granted to the three default User Role types (Administrator, Manager, User), do the following:

1. On the Roles screen, click the View Button 👁 (the eye) next to either the Administrator, Manager, or User Role types.

2. On the screen that opens, you will see the list of default permissions for the User Role you selected.

   You can tell which of the permissions apply to each User Role type by observing the direction of the slider next to it.

   - 🔘 A dark grey slider to the left indicates that this permission is disabled and can not be changed/enabled for this User Role type.

   - 🔘 A dark grey slider to the right indicates that this permission is enabled and can not be changed/disabled for this User Role type.

Creating Custom User Roles

Apexx Series Software allows the user to create custom User Roles that can then be applied to system Users. To create a custom User Role, do the following:

Note: The permission "Replace Keypad" is not available for Users of the "User" Role type.

1. From the Roles screen, click the Add ⊕ button located in the bottom right corner.

2. A list will appear containing the three default User Role types. Click the User Role type you want to use as the basis for the new custom User Role.

3. Click the Name text box and type a name for the new User Role.

4. Under Permissions, click the sliders to enable/disable the Permissions you want to apply to the new User Roled

   - 🔘 A light grey slider to the left indicates that this permission is disabled.

   - 🔵 A bright blue slider to the right indicates that this permission is enabled.

5. Click the Save button to create the new User Role.

Editing Custom User Roles

To edit a User Role, do the following:

1. From the Roles screen, locate the name of the User Role you want to edit, and click the Edit button ✐ (pencil).

2. If you want to rename the User Role, click the Name textbox and type a new name.

3. If you want to change any of the Permissions, click the sliders next to the Permission type you want to enable/disable.

   - ⬜ A light grey slider to the left indicates that this permission is disabled.

   - 🔵 A bright blue slider to the right indicates that this permission is enabled.

4. Click the Save button to save all changes.

Deleting a User Role

To Delete a User Role, do the following:

1. From the Roles screen, locate the name of the User Role you want to delete, then click the Delete button 🗑 (trashcan)

2. Confirm that you want to delete the User Role by clicking the "Yes" button in the Delete Confirmation popup window.

Applying User Roles

To apply Custom User Roles to a system, do the following:

1. From the main menu, click the Locks icon 🔒 , then select "Lock Systems".

   2. Immediately after clicking "Lock Systems", you will be sent to the "Lock System Search" screen. To edit a Lock System, double-click the name of the Lock system you want to edit, or click the Edit ✐ (pencil) icon.

3. Click "Assignments" to view the list of all the system's assigned User Roles.

4. Under "Roles", assign user-defined/custom roles by using the drop-down menus to select them from the list.

5. Repeat step 4 for all Custom User Roles you want applied to your system.

6. Click the Save button to save all changes.

Note: The first three Roles (Administrator, Manager, User) are system defaults and cannot be removed or changed.

USB Communication

About USB Connectivity

If your lock system does not include an eBox, you can use a USB cable to connect your system to the Apexx Series Software. The "USB Communication" section of the Apexx Series Software contains all of the tools needed to configure, program, and update your lock system's settings and firmware using the easy to use software interface.

NOTE: The sections that follow outline how to connect and add lock systems using a USB connection. To setup and connect a lock system using a network connection utilizing the eBox hardware, refer to Add Devices. See Directory Sync Mode for more information.

📖 Topics:

◆ Commission and Connect your Lock System ◆ Select a Region ◆ Connecting a Keypad via USB

◆ Software Setup ◆ System Configuration ◆ Device Configuration ◆ Holidays ◆ Schedules

◆ Users ◆ Roles ◆ Lock Groups c Audits

Commission and Connect your Lock System

Before connecting your lock system to the computer/software, commission your lock system and connect all of its components as outlined in the Axessor Apexx Installation Guide.

Select a Region

Using Apexx Series Software, perform the following steps:

1. Click the arrow icon → in the top-left corner of the screen to open the list of regions, then double click one of the Regions in the list to select it. If you haven't yet created a Region, see Region Management.

Connecting a Keypad via USB

To configure your lock system to communicate with the Apexx Series Software, do the following:

1. From the Apexx keypad's main menu, use the directional arrows to select the **"Advanced Menu"** icon ⚙ , then press the Enter key → .

2. Enter an authorized User ID, then press the Enter key → .

3. Enter the corresponding user combination, then press the Enter key → .

4. From the Advanced Menu, select the **"PC Connect"** icon 🖥 , then press the Enter key → .

5. Connect the USB end of a USB-to-USB-C cable to your computer's USB port, then connect the USB-C end of the cable into the USB-C port located on the side of the keypad.

6. **"Activate USB?"** appears onscreen > select **"Yes"** by pressing the Enter key → .

To USB power source
to keypad
USB-C connector
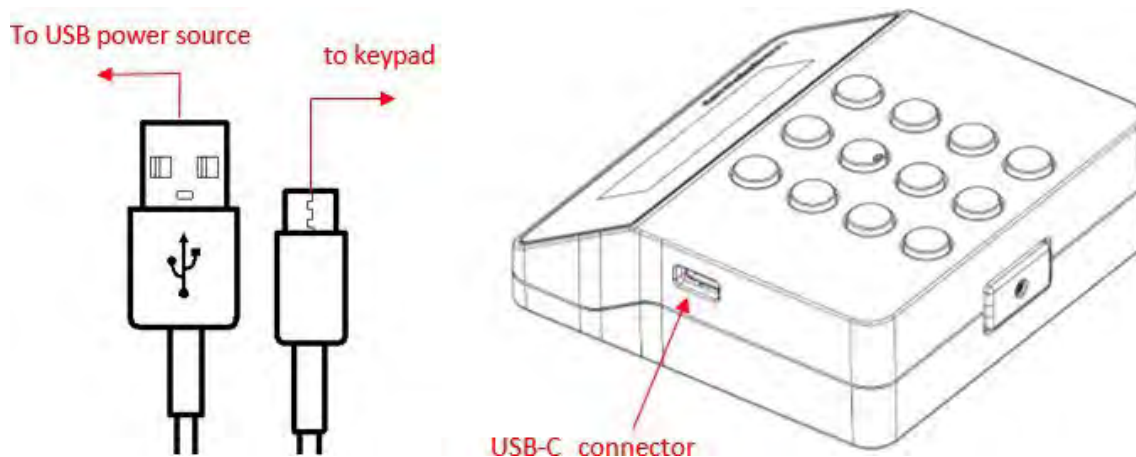
NOTE: Be mindful that the USB connection to the PC is a timed connection. After a period of time, the connection will Timeout, and **"USB TimeOut"** twill appear on the keypad display screen. To reestablish the connection, the user will have to refresh the USB connection using the keypad by pressing the Enter key .

USB Communication - Software Setup

Once the USB connection to the computer is established, complete the setup by doing the following:

1. From the Apexx Series Software menu, click "Locks" > "USB Communication".

2. Click the magnifying glass icon next to "Discover Devices" to discover all connected lock systems. If your lock system does not appear in the list, you may have to refresh the USB connection using the keypad.

3. When the lock system appears in the list, double-click it or click the Edit button ✎ (pencil).

4. Use the tools available on the System Configuration, Device Configuration, Holidays, Schedules, Users, Roles, Lock Groups, and Audits screens to configure your lock system. Each of these screens/tools are described below.

5. Once you are done making changes to your locks system, click the Save button.

USB Communication - System Configuration

about "System Configuration" details (click to expand)

The System Configuration screen contains the basic configuration settings for you Lock system.
The System Configuration screen has the following fields/settings:

- **Support Contact** - enter any relevant support contact names or information in this field

- **Time Zone** - Use the drop-down menu to select a Time Zone for your system

- **Time Format** - choose between on of the following formats:

    ◦ "12 Hour" - HH:MM AM/PM

    ◦ "24 Hour" - HH:MM

- **Date Format** - choose from one of the following formats:
  - MM/DD/YYYY
  - DD/MM/YYYY
  - YYYY/MM/DD
- **PIN Length** - Use the drop-down menu and select a PIN length for your lock system (between 6 and 12)
- **During Bolt Open** - This defines the behavior of the keypad when the bolt is open. Use the drop-down menu to select from one of the following:
  - "No Action"
  - "Beep Only"
  - "Notify Only"
  - "Beep + Notify"
- **During Door Open** - This defines the behavior of the keypad when the door is open. Use the drop-down menu to select from one of the following:
  - "No Action"
  - "Beep Only"
  - "Notify Only"
  - "Beep + Notify"
- **During Confirmation Window** - This defines the behavior of the keypad during a Confirmation Window. Use the drop-down menu to select from one of the following:
  - "No Action"
  - "Beep Only"
  - "Notify Only"
  - "Beep + Notify"
- **During Time Delay** - This defines the behavior of the keypad during a Time Delay event. Use the drop-down menu to select one of the following:
  - "No Action"
  - "Beep Only"
  - "Notify Only"
  - "Beep + Notify"
- **Buzzer Volume** - This refers to the Buzzer used to provide user feedback at the keypad. Use the drop-down menu to set the buzzer volume on a scale of 0 to 5 (0 = off, 5 = loudest)
- **Display Brightness** - This refers to the brightness of the keypad Display screen. Use the drop-down menu to set the Display screen brightness on a scale of 1 to 5 (1 = dimmest , 5 = brightest)
- **Keypad Brightness** - This refers to the brightness of the illuminating keys of the keypad. Use the drop-down menu to set the Display screen brightness on a scale of 0 to 5 (0 = off , 5 = brightest)

- **Countdown** - used to control how the remaining time in a time delay / time lock period is displayed on screen
  - ◦ "Disabled" - no count is displayed
  - ◦ "Down" - the count is displayed starting from the time delay (or time lock) value and counts down to zero
  - ◦ "Up" - the count is displayed starting from zero and going up until the time delay (or time lock) value is reached
- **Confirmation Window** - After a time delay period has expired, the lock enters the Confirmation Window, during which a valid credential can be entered to open the lock. Use the drop-down menu to set the Confirmation Window length in minutes and seconds. The Confirmation window can be given a value anywhere from 1-minute to 4-hours 15-minutes.
- **Immediate Time Lock Max** - this setting allows the user to define the maximum value for the Immediate Time Lock setting. Use the drop-down menu to set its value in days, hours, and minutes.
- **Lag Time** - If using Sequential Open, the Lag time is the amount of time between the unlocking of the primary lock and the unlocking of the other lock. Use the drop-down to select the Minutes and Seconds.
- **DST Observed** - click this slider to enable/disable the observance of Daylight Savings Time. DST is observed when the slider is blue and to the right .
- **Sequential Open** - this allows you to set up multiple locks to open sequentially with a single unlock command. When configured, the Primary lock will open, followed by a defined "Lag Time" period, then another lock will open. Click the slider to enable/disable Sequential Open. Sequential Open is enabled when the slider is blue and to the right .
- **Duress Enabled** - click this slider to enable/disable the Duress feature for your system. Duress is enabled when the slider is blue and to the right .

Once you are done making changes to the System Configuration settings, click the button.

Updating your device firmware

Update Firmware

Keypad and Lock firmware can be updated using the "Update Firmware" button, found on the USB Communication screen. To perform a Firmware update via USB, do the following:

1. From the main menu, click "Locks" > "USB Communication"

2. Follow the steps described above to connect your lock system to the computer running the Apexx Series Software.

3. Click the "Update Firmware" icon, located at the top right of the System Configuration screen.

4. In the Firmware Update window, use the drop-down menu to select your the "Firmware File" (the .zip folder containing the firmware files). If your firmware file does not appear in the list, navigate to the Firmware Management screen to manage your firmware files.

5. Click the "Update Firmware" button. The Firmware Update process will begin, and will conclude after several seconds (the time will vary depending on the size of your lock system).

USB Communication - Device Configuration

about "Device Configuration" details (click to expand)

The Device Configuration screen contains a list of all system devices and allows you to configure all device-specific settings via software.

All devices in the lock system are listed under "Devices" at the top of the screen. You can sort your devices in ascending or descending order by clicking any of the headings in the list. A blue arrow will appear above the respective heading indicating the direction in which the devices have been sorted ( ).

To view the configuration details of any device, simply click a device from the list. The Device Configuration details for each device type are described below:

"Lock" Details

- **Name** - enter a name into this field for Lock identification purposes
- **Bank Opening Dual Mode** - Use the drop-down menu to select one of the following options.
    - "Not Enabled"
    - "Any 2"
- **Schedule** - Use the drop-down list to select one of the available Schedules, or leave unassigned.
- **Opening Time Delay** - If a Time Delay has been applied to the lock, the Opening Time Delay is the period of time between when a valid credential is received at the keypad and when the lock can be accessed. Once this delay period is over, the Confirmation Window begins. The Opening Time Delay can be given a

value anywhere from 0-minutes (disabled) to 4-hours 15-minutes. Use the drop-down menu to set this value in hours/minutes.

- **Duress Opening Time Delay** - this is similar to Opening Time Delay, but is utilized when Duress is enabled. Use the drop-down menu to set this value in hours/minutes.

- **Remote Disabled** - When a signal is sent to the lock using a lock input configured for this feature, the lock can not be opened. Enable/disable the Remote Disabled feature by clicking this slider. This feature is enabled when the slider is blue and to the right ⬤.

Using the Configurable "Input Output" Table

You can sort the device I/Os in ascending or descending order by clicking the "I/O" column heading. A blue arrow will appear above the respective heading indicating the direction in which the devices have been sorted (▲ ▼).

To configure what each of the I/O are to be used for, click the Edit button ✏️ (pencil) in the row of the table corresponding to the I/O you wish to configure.

Configure the behavior of the lock by clicking the Normally Open / Normally closed button to toggle between the two states. (Normally Open) indicates that the lock Input/Output will be open when the lock is in its normal (locked) state, and (Normally Closed) indicates that the lock Input/Output will be closed when the lock is in its normal (locked) state.

Click the slider next to the option you wish to enable so that the slider moves to the right and turns blue ⬤, then click the Save button to store the change.

Configurable Input Options

- Remote Disabling
- Door Contact
- Skip Time Delay

Configurable Output Options

- Lock Open
- Time Delay Counting
- Confirmation Window Count
- Duress Code

Once you are done making changes to the Device Configuration settings, click the Save button.

USB Communication - Holidays

about "Holidays" details (click to expand)

The Holidays screen can be used to define certain days where access to the lock system is restricted. Holidays can be added, edited, or deleted using the available tools.

Creating a New Holiday

To create a new Holiday, do the following:

1. From the Holidays screen, click the Add icon ⊕ located at the bottom of the screen.

2. Under "Details", Click the Name field and enter a name for your holiday (Maximum 16 characters).

3. Use the interactive Calendar to select a day (or range of days) for your Holiday. Simply use the ◀ ▶ arrows to navigate to the appropriate month, then click the calendar to select a day or click-and-drag to select multiple consecutive days.

4. If your Holiday repeats annually, click the "Repeats Annually" slider so that the slider moves to the right and turns blue 🔵.

5. Click the Save button to create the new Holiday. Once created, it will show up in the list of Holidays on the left side of the screen.

Editing a Holiday

To Edit a Holiday, do the following:

1. From the Holidays screen, click the name of the Holiday you want to edit. The Holiday details will show up in the "Details" section.

2. If you want to edit the Name of the Holiday, click the Name field and enter a new name for your holiday

3. If you want to change the day/month of your Holiday, use the interactive Calendar to select a new day (or range of days) for your Holiday.

4. If your Holiday repeats annually, click the "Repeats Annually" slider so that the slider moves to the right and turns blue 🔵. Click the slider again to disable "Repeats Annually" ⚪.

5. After making changes to a Holiday, click the Save button to store the changes.

Deleting a Holiday

To Delete a Holiday, do the following:

1. From the Holiday Management screen, locate the name of the Holiday you want to delete, then click the Delete button 🗑 (trashcan)

2. Confirm that you want to delete the Holiday by clicking the "Yes" button in the Delete Confirmation popup window.

USB Communication - Schedules

about "Schedules" details (click to expand)

The Schedules screen can be used to define blocks of time during which access to the lock system is restricted. Schedules can be added, edited, or deleted using the available tools.

Creating a New Schedule

To create a new Schedule, do the following:

1. From the Schedules screen, click the Add icon ⊕ located at the bottom of the screen.

2. Click the Name field and enter a name for your Schedule.

3. Use the interactive Calendar to select time blocks for your Schedule. See "Creating, Editing, and Deleting Time Blocks" for details.

4. Click the Save button to create the new Schedule.

Creating, Editing, and Deleting Timeblocks

When creating a new Schedule, you are presented with an interactive calendar to which you can create Schedule Timeblocks of varying duration. The calendar allows for the creation of timeblocks anywhere in the 24-hour time frame for each of the seven weekdays. Systems that use Schedules use timeblocks to define when access is allowed.

Note: Schedules can contain a maximum of 35 user created timeblocks.

Creating a Timeblock

Creating time blocks can be done by either of the following methods:

- click-and-drag click anywhere on the interactive calendar to quickly create a single 10-minute time block, or click and drag anywhere on the calendar to create a time block of any length.

  Note: When using the click-drag approach, the timeblocks created consist of 10-minute chunks that start and end at :00, :10, :20, :30, :40, or :50. If you want to create timeblocks that start or end at any other time, or are not set up in 10-minute chunks, double-click the calendar to open the Schedule Details window.

- double-click: create a timeblock by clicking anywhere on the interactive calendar, then double-click the newly created Time Block to open the Schedule Details window.

Schedule Details window

The Schedule Details window provides the following fields to allow you to customize the time block you have selected:

Start Date

- Start Day: use the drop-down menu to select the day of the week the timeblock begins.

- Start Time: use the drop-down menu to select the time of day the timeblock begins. Select both the hour (0-23) and minute (0-59).

End Date

- End Day: use the drop-down menu to select the day of the week the timeblock ends.

- End Time: use the drop-down menu to select the time of day the timeblock ends. Select both the hour (0-23) and minute (0-59).

Once the Schedule details have been set to your liking, click the OK button to return to the interactive calendar.

Editing a Timeblock

You can edit existing timeblocks by doing one of the following:

- Hover your mouse cursor over an existing timeblock. A dotted line will appear at the top and bottom edges of the timeblock. Move your mouse cursor over the dotted line, and when it turns into the double-arrow icon , use your mouse to click-and-drag either edge of the timeblock to change the beginning and endpoint of the blocking period.

- Double-click an existing timeblock to open the Schedule Details window, where you can change/edit the start and end of the timeblock.

Deleting a Timeblock

To delete a timeblock, hover your mouse cursor over the timeblock you want to delete, then click the Delete button (trashcan), or right-click the timeblock, then choose "Delete".

Editing a Schedule

To Edit a Schedule, do the following:

1. From the Schedules screen, click the name of the Schedule you want to edit.

2. If you want to edit the Name of the Schedule, click the Name field and enter a new name for your schedule.

3. Use the interactive calendar to add, edit, or delete time blocks on your schedule.

4. After making changes to a Schedule, click the Save button to store the changes.

Deleting a Schedule

To Delete a Schedule, do the following:

1. From the Schedules screen, click the Delete button 🗑 (trashcan) corresponding to the Schedule you want to delete.

2. Confirm that you want to delete the Schedule by clicking the "Yes" button in the Delete Confirmation popup window.

USB Communication - Users

about "Users" details (click to expand)

The Users screen can be used to create, edit, or delete lock users in a lock system. The software can be used to configure lock user details, such as their role, lock group, permissions, and assigned locks.

Important! About Lock User PINs

NOTE: Whenever a Lock User is added or edited, the software will assign them a new randomly generated PIN. Please note the following regarding User PIN creation and management:

- Ensure that the PIN is given to the Lock User in a secure way.

- When the Lock User uses this code to gain entry to the system using the Apexx keypad, it is valid one time only. After the initial entry, the Lock User will be prompted to immediately change their PIN.

- For improved security, instruct all Lock Users to ensure that they choose PINs that are not simple (e.g. 1,2,3,4,5,6) or easy to guess (based on dates, addresses, etc.)

Creating a New Lock User

To create a new Lock User for a USB-connected lock system, do the following:

1. From the Users screen, click the Add icon ⊕ located at the bottom of the screen.

2. Use the drop-down menus provided to set the following User fields:

   - **Role** - choose from Administrator, Manager, User, or one of the user-created custom Roles.

   - **Group** - select a Lock Group from the user-created options available.

   - **Lock User ID** - select a Lock User ID number to assign the User (from 1 to 10)

3. Set the Lock User's "Individual Permissions" by clicking the slider to enable/disable one of the available permissions. The Permission is enabled when the slider is blue and to the right 🔵.

4. Assign Locks to a Lock User by clicking the slider to enable/disable user access to the corresponding lock. A Lock is assigned when the slider is blue and to the right 🔵.

5. Click the Save button to store the Changes.

6. A pop-up window will open showing that the User has been assigned a PIN. You can click the "Copy" button to copy this new PIN assignment info to the clipboard, so that this information can be stored in a secure place by the system administrator.

7. Click the "OK" button to close the pop-up window.

Editing a Lock User

To Edit a Lock User, do the following:

1. From the Users screen, click the name of the Lock User you want to edit.
2. Use the drop-down menus provided if you wish to modify the Lock User's Role or Group.
3. Change the User's "Individual Permissions" and/or "Assigned Locks" by clicking the respective sliders.
4. Click the "Change PIN" button if you wish to assign a new PIN to the Lock User. In the window that opens, enter the new PIN in the "PIN" field, enter this new PIN again in the "Confirm PIN" field, then click the Save button.
5. After making changes to a Lock User, click the Save button to store the changes.

USB Communication - Roles

about "Roles" details (click to expand)

User Roles are divided into three major types: Administrator, Manager, and User. Each User created in the system is assigned one of these roles, which grants them a defined set of abilities for system access and administration.

Note: The Administrator, Manager, and User role types are all pre-defined. You can not edit their permissions.

In addition to these three default roles, you can create custom User Roles using the Apexx Series Software.

Viewing Permissions of Default User Roles

To view the details regarding the permissions granted to the three default User Role types (Administrator, Manager, User), do the following:

1. On the Roles screen, click the View Button 👁 (the eye) next to either the Administrator, Manager, or User Role types.
2. Under "Permissions", you will see the list of default permissions for the User Role you selected.

   You can tell which of the permissions apply to each User Role type by observing the direction of the slider next to it.

   - ⬤▬ A dark grey slider to the left indicates that this permission is disabled and can not be changed/enabled for this User Role type.

   - ▬⬤ A dark grey slider to the right indicates that this permission is enabled and can not be changed/disabled for this User Role type.

Creating Custom User Roles

Apexx Series Software allows the user to create custom User Roles that can then be applied to system Users.

To create a custom User Role, do the following:

Note: The permission "Replace Keypad" is not available for Users of the "User" Role type.

1. From the Roles screen, click the Add button ⊕ located at the bottom of the screen.
2. Click the Name text-box and type a name for the new User Role.
3. Use the "Role" drop-down menu to select one of the three default User Role types that you want to use as the basis for the new custom User Role (Administrator, Manager, or User).
4. Under Permissions, click the sliders to enable/disable the Permissions you want to apply to the new User Roled
   - ⬤ A light grey slider to the left indicates that this permission is disabled.
   - ⬤ A bright blue slider to the right indicates that this permission is enabled.
5. Click the Save button to create the new User Role.

Editing Custom User Roles

To edit a User Role, do the following:

1. From the Roles screen, click the name of the User Role you want to edit.
2. If you want to rename the User Role, click the Name text box and type a new name.
3. If you want to change the User Role type (used for you custom User's default permissions), use the drop-down menu and select a new Role.
4. If you want to change any of the Permissions, click the sliders next to the Permission type you want to enable/disable.
   - ⬤ A light grey slider to the left indicates that this permission is disabled.
   - ⬤ A bright blue slider to the right indicates that this permission is enabled.
5. Click the Save button to save all changes.

Deleting a User Role

To Delete a User Role, do the following:

1. From the Roles screen, locate the name of the User Role you want to delete, then click the Delete button 🗑 (trashcan)
2. Confirm that you want to delete the User Role by clicking the "Yes" button in the Delete Confirmation popup window.

USB Communication - Lock Groups

about "Lock Groups" details (click to expand)

Lock Groups can be created and assigned to lock systems as a means of categorizing groups of locks by function, location, or some other method. Once a Lock Group has been created, Lock Users can be assigned to them.

Creating a New Lock Group

To create a new Lock Group, do the following:

1. From the Lock Groups screen, click the Add icon ⊕ located at the bottom of the screen.
2. In the field provided, enter a name for the Lock Group.
3. Click the Save button to create the new Lock Group.

Editing a Lock Group

To Edit a Lock Group, do the following:

1. From the Lock Groups screen, locate the name of the Lock Group you want to edit, and click the Edit

    button ✎ (pencil).
2. Edit any of the Lock Group fields you want to change.
3. After making changes to a Lock Group, click the Save button to store the changes.

Deleting a Lock User

To Delete a Lock Group, do the following:

1. From the Lock Groups screen, locate the name of the Lock Group you want to delete, then click the

    Delete button 🗑 (trashcan)
2. Confirm that you want to delete the Lock Group by clicking the "Yes" button in the Delete Confirmation popup window.

USB Communication - Audits

about "Audits" details (click to expand)

The Audits screen allows you to retrieve Audits from your USB connected device, which you can view and save/ backup to your computer for storage purposes. To access system Audits, do the following:

1. From the main menu, click **"Locks" > "USB Communication"**
2. Follow the steps described above to connect your lock system to the computer running the Apexx Series Software.
3. Click "Audits" to open the Audits screen.

4. Click the "Download Audits" button ⬇ .

5. In the Audits window, use the following tools to specify how you'd like to retrieve the audits:

   - **Connection Type** - the connection type is automatically set to USB

   - **Audit Table** - use this drop-down menu to select an Audit Table (Main or Firmware)

   - **All Audits/Number of Audits** - when the All Audits slider is blue and to the right ━●, all of the audits will retrieved from the Lock System. Alternatively, you can click the slider icon so that it moves to the left and turns grey ━●

     A text box will appear that will allow you to enter the number of audits to retrieve from the system (most recent).

   - **Devices to Audit** - contains a list of all locks in the system. Use the sliders next to each of the respective lock names to select which locks to audit. To audit one or more locks, click the slider next to each lock you want to audit so that the slider moves to the right and turns blue ━●.

6. Ensure your lock system is connected to your computer (via USB or Network), then click the "Get Audits" button.

7. Once the Audits have loaded, you can click the "View Audits In" drop-down menu and change the timezone that the listed data is presented in.

Viewing Audits - Using the Audits Filter

The list of Audits can be filtered to customize which Audits appear in the Audits list. The filter settings also determine which Audits appear when you generate an Audit Report.

When you click the Filter icon ▽ , the screen expands to reveal a series of text fields and drop-down fields. You can use one or multiple of these fields to filter the Audit data you see on screen. Click the Filter icon again to close the filter.

- **Sequence** - use this text field to enter the numeric sequence corresponding to the Audit you wish to view (1 being the first Audit event in the sequence of Audits you downloaded from your Lock System)

- **Device** - use this text field to enter a Device name, or a partial name ("Lock1", or just "Lock", "1", "L", etc.)

- **Device Number** - type the device number in the text field provided

- **Event** - click the checkbox so that a blue check-mark ☑ appears next to one or more Event Type that you wish to be included.

- **Primary User#** - use this text field to Enter a User ID number. **NOTE:** This field only applies to certain Audit types, such as "Bolt Open".

- **Secondary User#** - use this text field to Enter a User ID number. **NOTE:** This field only applies to certain Audit types, such as "Bolt Open" when Dual Mode is being used in a Lock System.

- **Date Range** - set a start and end date by clicking the corresponding calendar icon 📅 then use the interactive calendar to select a date. Use the ◀ ▶ arrows to navigate to the appropriate month, then click the calendar to select a specific day for both your "Start" and "End" dates.

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to clear the filter to see the full list of Audits. To do this, click the "Reset" button.

Viewing Audits - Generating an Audit Report

After using the filter and sorting tools to arrange your Audit data, click the "View Report" ▤ button to generate an Audit Report. The Apexx Report Viewer will open in a new window.

Using the Apexx Report Viewer

see Reports

Reports

Apexx Series Software can generate multiple different customizable report types.

Follow the links below for details about each of the following report types:

Audit Report

Hardware Delta Report

Software Users Report

Lock System Users

Report Firmware Report

System Log Report

Scheduled Reports

Using the Apexx Report Viewer

After you run a report, the Apexx Report Viewer will open automatically. Below is an overview of some of the Apexx Report Viewer's basic tools:

Page/Document Navigation Tools:

- **First Page** - The ⏮ symbol navigates to the beginning of the document.

- **Previous Page** - The ◀ symbol navigates to the previous page of the document relative to the page you are currently viewing.

- **Current Page** - 2 of 193 displays the current page number. To navigate to a specific page, you can click the text box and type the page number you wish to navigate to.

- **Next Page** - The ▶ symbol navigates to the next page of the document relative to the page you are currently viewing.

- **Last Page** - The ⏭ symbol navigates to the end of the document.

- **Page Setup** - click the button to configure the paper size and source for printing, the page orientation (Portrait or Landscape), and set the page margins.

- **Switch View** - click the button to switch from "Print Preview" to "Interactive View", or vice versa.

- **Print Report** -click the button to configure the report for printing, including selecting and configuring a printer, setting the page range, and choosing the number of copies to print.

- **Export** - click the ![button] button to use the drop-down menu to choose which file format you wish to export the data to. The possible export file formats are as follows:

    - Acrobat (PDF) file

    - CSV (comma delimited)

    - Excel Worksheet

    - PowerPoint Presentation

    - Rich Text Format

    - TIFF File

    - Word Document

- **Search in Report Contents** - click the ![search] button to perform a text search of the report data. A pop-up window will open containing a text field where you can enter text/words/numbers to search for. You can refine your results by selecting "Match case" ![Aa] , "Match whole word" ![ab] , and/or "Use regular expressions" ![..|] .

- **Zoom** - use the arrows and slider on the bottom-right corner of the report window to zoom in or out of the report page you are currently viewing. Click the left arrow ![left] or click and drag the slider to the left to zoom out. Click the right arrow ![right] or click and drag the slider to the right to zoom in .

Audit Report

The Audit Report screen allows you to generate reports of Audit events for your Working region, and customize the report contents based on user selected criteria.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

◆ Running an Audit Report ◆ Using the Apexx Report Viewer ◆ Searching/Filtering the Audits list

◆ Using the Audit Report Filter

Running an Audit Report

An Audit report can be customized to include Audit events that fit one or more of the following user-configurable categories:

- **Date Range** - the Audit Report will include Audit events that fall between the selected "From" and "To" dates.

    - Click the "Date Range" ✅ check-box

    - Use the interactive Calendars to select a "From" and "To" date. Use one of the following methods:

        ◦ Click the 📅 Calendar symbol to open the interactive calendar. Use the ◀ ▶ arrows to navigate to the appropriate month, then click the calendar to select a specific day for both your "From" and "To" dates.

        ◦ Click the "From" text field, then type a start date (format is Month/Day/Year), then click the "To" text field and type an end date.

- **Event** - the Audit Report will include only Audit events of the type selected by the user.

    - Click the "Event" ✅ check-box

    - Click an event type from the list provided.

- **Devices / Lock Systems** - the Audit Report will include only Audits from the selected devices

    - Click the "Include all devices" ✅ check-box, or

    - Click the ✅ check-box next to one or more of the listed devices to include them in the report.

Once your Audit Report criteria has been set, click the "Run Report" button.

Using the Apexx Report Viewer

see Reports

Searching/Filtering the Audits list

There are three useful tool icons located at the top of the list of Audits that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon ▤ to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the Audits in ascending ▲ or descending ▼ order based on the chosen Sort Category.

Filter - allows you to filter the Audit list based on certain criteria. See description below.

Using the Audit Report Filter

When you click the Filter icon ▽ , the screen expands to reveal a series of text fields and drop-down fields. You can use one or multiple of these fields to filter the Audit data you see on screen. Click the Filter icon again to close the filter.

- **Lock System** - use this text field to enter a Lock System name, or a partial name ("System1", or just "System", "1", "S", etc.)

- **Lock** - use this text field to enter a Lock name, or a partial name ("Lock1", or just "Lock", "1", "L", etc.)

- **Device Type** - use the drop-down menu and select a Device type. Choose from All, Unknown, Keypad, Lock, or eBox.

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to clear the filter to see the full list of Audits

Hardware Delta Report

The Hardware Delta Report screen allows you to generate a report comparing the device settings on your lock system hardware with the saved settings in Apexx Series Software. If any of your hardware settings don't match the software settings, you might have to manually program your lock system to push the settings to your devices (see Lock Systems, "Manually Programming your Lock System")

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

◆ Running a Hardware Delta Report ◆ Using the Apexx Report Viewer

◆ Searching/Filtering the Lock Systems list ◆ Using the Hardware Delta Report Filter

Running a Hardware Delta Report

1. On the bottom-right corner of the screen, use the drop-down menu to select a Connection Type (Network, or USB).
2. On the Lock System list, click the "Run Report" ▤ button corresponding to the lock system whose hardware/software settings you want to compare. If the report doesn't run properly, check to ensure your device is connected using the Connection Type you chose in the previous step.

Using the Apexx Report Viewer

see Reports

Searching/Filtering the Lock Systems list

There are three useful tool icons located at the top of the list of Lock Systems that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon ▤ to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the Audits in ascending ▲ or descending ▼ order based on the chosen Sort Category.

Filter - allows you to filter the Audit list based on certain criteria. See description below.

Using the Hardware Delta Report Filter

When you click the Filter icon , the screen expands to reveal a series of text fields and drop-down fields. You can use one or multiple of these fields to filter the Lock System data you see on screen. Click the Filter icon again to close the filter.

- **Name** - use this text field to enter a Lock System name, or a partial name ("System1", or just "System", "1", "S", etc.)

- "Apply" button - click this button to apply your filter criteria

- "Reset" button - click this button to clear your filter criteria

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to clear the filter to see the full list

Software Users Report

The Software Users Report allows you to view and publish a list of all Software Users in your database.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

◆ Running a Software Users Report ◆ Searching/Filtering the Software User list ◆ Using the Apexx Report Viewer

Running a Software Users Report

To run a Software Users Report, adjust any applicable filters, then click the "Run Report" button.

Searching/Filtering the Software User list

The Software Users Report screen consists of a list of all Software Users contained in your database. There are two useful tool icons located at the top of the list of Software Users that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the Software Users in ascending ▲ or descending ▼ order based on the chosen Sort Category.

Using the Apexx Report Viewer

see Reports

Lock System Users Report

The Lock System Users Report allows you to customize and generate reports of Lock Users for your Working Region, sorting them by Name, Status, , and/or Lock System.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

◆ Searching/Filtering the Lock User list ◆ Using the Lock System Users Report Filter

◆ Running a Lock System Users Report ◆ Using the Apexx Report Viewer

Searching/Filtering the Lock User list

The Lock System Users Report screen consists of a list of all Lock Users belonging to your Working Region. There are three useful tool icons located at the top of the list of Lock Users that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon 📋 to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the Lock Users in ascending ▲ or descending ▼ order based on the chosen Sort Category.

Filter - allows you to filter the Lock User list based on certain criteria. See description below.

In addition to these tools, you can also manually select which Lock Users to include in the report by clicking the check-box ☐ next to the names on the Lock User list. Once selected, a blue check-mark will appear. ☑

Using the Lock System Users Report Filter

When you click the Filter icon ▼ , the screen expands to reveal a series of text fields and drop-down fields. You can use one or multiple of these fields to filter the Lock User data you see on screen. Click the Filter icon again to close the filter.

- **First Name** - use this text field to enter a User's first name, or a partial name ("Johnathan", or just "John", "J", etc.)

- **Last Name** - use this text field to enter a User's second name, or a partial name ("Williams", or just "Will", "W", etc.)

- **Status** - use the drop-down menu and select a User Status. Choose from All, Active, or Inactive.

- **Lock Access Group** - use this text field to enter a Lock Access Group name, or a partial name ("Employee Group 1", or just "Employee", "E", "1", "Group", etc.)

- **Lock System** - use this text field to enter a Lock System name, or a partial name ("Main Bank 1", or just "Main", "1", "M", "Bank", etc.)

- "Apply" button - click this button to apply your filter criteria

- "Reset" button - click this button to clear your filter criteria

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to clear the filter to see the full list of Lock Users

Running a Lock System Users Report

Once your Lock System Users Report has been configured, click the "Run Report" button.

Using the Apexx Report Viewer

see Reports

Firmware Report

The Firmware Report screen allows you to generate a report of the devices in your Working Region and lists the firmware and bootloader version for each device.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

- ◆ Running_a_Firmware_Report ◆ Using_the_Apexx_Report_Viewer
- ◆ Firmware Report#Searching/Filtering_the_Device_list ◆ Using_the_Firmware_Report_Filter

Running a Firmware Report

To run a Firmware Report, do the following:

1. In the list of devices on the Firmware Report screen, click the check-boxes next to each of the devices you wish to include in your report.
2. Click the "Run Report" button to create the report and open the Apexx Report Viewer.

Using the Apexx Report Viewer

see Reports

Searching/Filtering the Device list

There are three useful tool icons located at the top of the list of devices that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the devices in ascending ▲ or descending ▼ order based on the chosen Sort Category.

Filter - allows you to filter the device list based on certain criteria. See description below.

Using the Firmware Report Filter

When you click the Filter icon ⛉ , the screen expands to reveal a series of text fields and drop-down fields. You can use one or multiple of these fields to filter the device data you see on screen. Click the Filter icon again to close the filter.

- **Lock System** - use this text field to enter a Lock System name, or a partial name ("System1", or just "System", "1", "S", etc.)

- **Lock** - use this text field to enter a Lock name, or a partial name ("Lock1", or just "Lock", "1", "L", etc.)

- **Device Type** - use the drop-down menu and select a Device type. Choose from All, Unknown, Keypad, Lock, or eBox.

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to clear the filter to see the full list of devices

System Log Report

The System Log Report screen allows you to customize and generate reports of System Log events.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

- ◆ Searching/Filtering the System Log list ◆ Using the System Log Report Filter
- ◆ Running a System Log Report ◆ Using the Apexx Report Viewer

Searching/Filtering the System Log list

The System Log Report screen consists of a list of all System Log events. There are three useful tool icons located at the top of the System Log list that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the System Log events in ascending ▲ or descending ▼ order based on the chosen Sort Category.

Filter - allows you to filter the System Log list based on certain criteria. See description below.

Using the System Log Report Filter

When you click the Filter icon , the screen expands to reveal a series of text fields and drop-down fields. You can use one or multiple of these fields to filter the System Log data. Click the Filter icon again to close the filter.

- • **Start Date** - Select the starting point of the time period for which you wish to view System Log events. Set the date using one of the following methods:

  - ◦ Click the Calendar symbol to open the interactive calendar. Use the arrows to navigate to the appropriate month, then click the calendar to select a specific day for both your "From" and "To" dates.

  - ◦ Click the "From" text field, then type a start date (format is Month/Day/Year), then click the "To" text field and type an end date.

- • **End Date** - Select the end point of the time period for which you wish to view System Log events. Set the date using one of the following methods:

  - ◦ Click the Calendar symbol to open the interactive calendar. Use the arrows to navigate to the appropriate month, then click the calendar to select a specific day for both your "From" and "To" dates.

  - ◦ Click the "From" text field, then type a start date (format is Month/Day/Year), then click the "To" text field and type an end date.

- • **Region** - use this text field to enter a Region name, or a partial name ("Downtown", or just "Down", "D", etc.)

- **Updated By** - use this text field to enter a software username, or a partial name ("Johnny", or just "John", "J", etc.)

- **Action** - use the drop-down menu and select from one of the available Action categories (All, None, Created, Updated, Deleted)

- **Type** - use the drop-down menu and select from one of the available System Log Types

- **Max Displayed Entries** - use the drop-down menu and select the maximum number of entries you want displayed on the System Log Report screen

- "Apply" button - click this button to apply your filter criteria

- "Reset" button - click this button to clear your filter criteria

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to clear the filter to see the full list of System Logs

Running a System Log Report

Once your System Log Report has been configured, click the "Run Report" button.

Using the Apexx Report Viewer

see Reports

Scheduled Report

The Scheduled Report screen allows to generate automated reports and send those reports to recipients on a user defined schedule.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

◆ Creating a Scheduled Report ◆ Editing a Scheduled Report ◆ Deleting a Scheduled Report

Creating a Scheduled Report

To create a Scheduled Report, do the following:

1. Click the add button at the bottom of the Scheduled Report screen.

2. Select one of the following report types:
    ◦ **Software Users Report**
    ◦ **Critical Security Event Report**
    ◦ **Lock Open Report**
    ◦ **Safe Users Report**

3. Use the following tools to customize your report schedule:

    ◦ **Recipients:** click the text-box and enter a valid email address (this is where the scheduled reports will be sent).
    ◦ **"Send the Report Every":** use this field to set a number for the frequency of the report. This number works in conjunction with the frequency period to create the report schedule.
    ◦ **Frequency Period:** click the drop-down menu and select one of the available frequency periods (Days, Weeks, Months)
    ◦ **Starting On:** click the calendar icon [📅]   , then use the interactive calendar to select the start date when you want the report schedule to take effect.
    ◦ **Report Format:** Select either pdf (portable document format) or csv (comma-separated values)

4. Activate or Deactivate your report schedule by clicking the Active/Inactive button at the top of the screen. Clicking the button will toggle the state from Active to Inactive (or Inactive to Active). When the button is green [Active] , the automated reports will be sent to the chosen recipients as scheduled. When the button is red [Inactive] , the automated reports will not be sent to the recipients.

5. (Optional) If you want to view a sample report, click the "Run Report" button. This will generate a report in the Apexx Report Viewer. See Reports for details on how to use the Apexx Report Viewer.

6. Click the "Save" button to create the new report schedule.

Editing a Scheduled Report

To edit a Scheduled Report, do the following:

1. From the main menu, click Reports > Scheduled Reports

2. From the Scheduled Reports screen, locate and double-click the name of the Scheduled Report you want

   to edit or click the corresponding Edit button   ✏️   (pencil).

3. Use the following tools to edit your report schedule:
   - **Recipients:** click the textbox and enter a valid email address (this is where the scheduled reports will be sent).
   - **"Send the Report Every":** use this field to set a number for the frequency of the report. This number works in conjunction with the frequency period to create the report schedule.
   - **Frequency Period:** click the drop-down menu and select one of the available frequency periods (Days, Weeks, Months)

   - **Starting On:** click the calendar icon 📅 , then use the interactive calendar to select the start date when you want the report schedule to take effect.
   - **Report Format:** Select either pdf (portable document format) or csv (comma-separated values)

4. Activate or Deactivate your report schedule by clicking the Active/Inactive button at the top of the screen. Clicking the button will toggle the state from Active to Inactive (or Inactive to Active). When the button is green Active , the automated reports will be sent to the chosen recipients as scheduled. When the button is red Inactive , the automated reports will not be sent to the recipients.

5. After making changes to a Scheduled Report, click the Save button to store the changes.

Deleting a Scheduled Report

To Delete a Scheduled Report, do the following:

1. From the Scheduled Report screen, locate the name of the Scheduled Report you want to delete, then

   click the corresponding Delete button 🗑️ (trashcan)

2. Confirm that you want to delete the Scheduled Report by clicking the "Yes" button in the Delete Confirmation popup window.

Selecting a Working Region

Before viewing, configuring, or connecting to a lock system, you must select a Region from the Apexx Series Software main menu.

📖 Topics:

◆ Accessing the Working Region list ◆ Searching/Filtering the Working Region list

◆ Displaying/Navigating the Working Region list

Accessing the Working Region list

To select a Region, do the following:

1. Click the → arrow icon at the top of the menu to access the list of Working Regions. In addition to the names, each Region in the list also includes details with respect to the number of Locks 🔒 , Lock Users 👥 , Schedules 📅 , Holidays 📆 , Roles 🪪 , and Lock Access Groups 👥 that the Region is comprised of.

2. Select the Region by double-clicking its name from the list. The Working Region list will close and its name will be displayed at the top of the menu on the left side of the screen

Searching/Filtering the Working Region list

There are three useful tool icons located at the top of the list of Working Regions that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon 📋 to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the Regions in ascending ▲ or descending ▼ order based on the chosen Sort Category.

Filter - when you click the Filter icon ▼ , the screen expands to reveal a "Name" text field and "PIN Length" drop down field. You can use one or both of these to filter the data in the Region list. Click the Filter icon again to close the filter.

- Name - use this text field to enter a Region name, or a partial name ("Building 1", or just "Building", "1", "B", etc.)

- PIN Length - click the drop-down menu to select from 6, 7, 8, 9, 10, 11, or 12 digits.

- "Apply" button - click this button to apply your filter criteria (Name and/or PIN Length) to the list of Regions

- "Reset" button - click this button to clear your filter criteria (Name and/or PIN Length)

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to Reset the filter to see the full list of Regions

Displaying/Navigating the Working Region list

There are additional tool icons and buttons located at the bottom of the list of Working Regions that allow you to modify how the data in the list is presented:

Rows Per Page - click the drop-down menu [▾] to select the number of rows of data you want displayed per page.

First Page - click the [⫷] button to navigate to the first page of data.

Previous Page - click the [‹] button to navigate to the previous page of data.

Next Page - click the [›] button to navigate to the next page of data.

Last Page - click the [»] button to navigate to the last page of data.

Region Management

The Region Management screen contains a list of all Regions in your database and allows you to Add, Edit, or Delete Regions. A Region can be viewed as the top of the system hierarchy, with Users and Lock Systems being managed at the Region level.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

◆ Searching/Filtering the Region Management list ◆ Displaying/Navigating the Region list

◆ Creating a New Region ◆ Editing a Region ◆ Deleting a Region

Searching/Filtering the Region Management list

There are three useful tool icons located at the top of the list of Regions that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon 📋 to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the Regions in ascending ▲ or descending ▼ order based on the chosen Sort Category.

Filter - when you click the Filter icon ▼ , the screen expands to reveal a "Name" text field and "PIN Length" drop down field. You can use one or both of these to filter the data in the Region list. Click the Filter icon again to close the filter.

- Name - use this text field to enter a Region name, or a partial Region name ("Building 1", or just "Building", "1", "B", etc.)

- PIN Length - click the drop-down menu to select from 6, 7, 8, 9, 10, 11, or 12 digits.

- "Apply" button - click this button to apply your filter criteria (Name and/or PIN Length) to the list of Regions

- "Reset" button - click this button to clear your filter criteria (Name and/or PIN Length)

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to Reset the filter to see the full list of Regions

Displaying/Navigating the Region list

There are additional tool icons and buttons located at the bottom of the list of Regions that allow you to modify how the data in the list is presented:

Rows Per Page - click the drop-down menu ⬚▾ to select the number of rows of data you want displayed per page.

First Page - click the ⟦«⟧ button to navigate to the first page of data.

Previous Page - click the ⟦‹⟧ button to navigate to the previous page of data.

Next Page - click the ⟦›⟧ button to navigate to the next page of data.

Last Page - click the ⟦»⟧ button to navigate to the last page of data.

Creating a New Region

To create a new Region, do the following:

1. From the Region Management screen, click the Add icon ⊕ located in the bottom right corner of the screen.

2. A Window will open that allows you to edit the following fields:
   - **Name** - The name used to identify the Region in the software. To Name the new Region, simply type a new name in the text-box provided.
   - **Parent** - You can create a sub-Region of an existing Region by selecting a Parent. This allows for the sharing of things such as Lock Systems and Holidays between a Parent Region and its sub-Regions. To select a Parent Region, click the arrow to open the drop-down menu, then choose one of the available Regions from the list.
   - **PIN Length** - The PIN (Personal Identification Number) length that will be used to grant access throughout the system. To choose a PIN length, click the arrow to open the drop-down menu, then choose one of the available options. (**Note:** If you choose a Parent, the Region you create will inherit the PIN Length from the Parent)

3. Click the Save button to create the new Region.

Editing a Region

To Edit a Region, do the following:

1. From the Region Management screen, locate the name of the Region you want to edit and click the Edit button ✏ (pencil).

2. A Window will open that allows you to edit the following fields:
   - **Name** - The name used to identify the Region in the software. To Edit the Name, simply type a new name in the text-box provided.
   - **PIN Length** - The PIN (Personal Identification Number) length that will be used to grant access throughout the system. To change the PIN length, click the arrow to open the drop-down menu, then choose one of the available options.

3. After making changes to a Region, click the Save button to store the changes.

Deleting a Region

To Delete a Region, do the following:

1. From the Region Management screen, locate the name of the Region you want to delete, then click the Delete button 🗑 (trashcan).

2. Confirm that you want to delete the Region by clicking the "Yes" button in the Delete Confirmation popup window.

Time

This menu contains tools allowing a valid user to manage Schedules by creating time blocks using an interactive calendar and use the software to create and manage Holidays.

Follow the links below for details about each of the following Time screens:

Schedule Management

Holiday Management

Holiday Management

The Holiday Management screen can be used to define certain days where access to the lock system is restricted. Holidays can be added, edited, or deleted using the tools available on the Holiday Management screen.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

Topics:

◆ Creating a New Holiday ◆ Editing a Holiday ◆ Deleting a Holiday

◆ Searching/Filtering the Holiday list ◆ Displaying/Navigating the Holiday list

◆ Applying a Holiday to a Lock System

Creating a New Holiday

To create a new Holiday, do the following:

1. From the Holiday Management screen, click the Add icon located at the bottom of the screen.

2. Under "Details", Click the Name field and enter a name for your holiday (Maximum 16 characters).

3. Use the interactive Calendar to select a day (or range of days) for your Holiday. Simply use the arrows to navigate to the appropriate month, then click the calendar to select a day or click-and-drag to select multiple consecutive days.

4. If your Holiday repeats annually, click the "Repeats Annually" slider so that the slider moves to the right and turns blue.

5. Click the Save button to create the new Holiday. Once created, it will show up in the list of Holidays on the left side of the screen.

Editing a Holiday

To Edit a Holiday, do the following:

1. From the Holiday Management screen, locate the name of the Holiday you want to edit, and either double-click it or click the Edit button (pencil).

2. If you want to edit the Name of the Holiday, click the Name field and enter a new name for your holiday

3. If you want to change the day/month of your Holiday, use the interactive Calendar to select a new day (or range of days) for your Holiday.

4. If your Holiday repeats annually, click the "Repeats Annually" slider so that the slider moves to the right and turns blue. Click the slider again to disable "Repeats Annually".

5. After making changes to a Holiday, click the Save button to store the changes.

Deleting a Holiday

To Delete a Holiday, do the following:

1. From the Holiday Management screen, locate the name of the Holiday you want to delete, then click the

    Delete button 🗑 (trashcan)

2. Confirm that you want to delete the Holiday by clicking the "Yes" button in the Delete Confirmation popup window.

Searching/Filtering the Holiday list

There are three useful tool icons located at the top of the Holiday Management page that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon 📋 to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the Holidays in ascending ▲ or descending ▼ order based on the chosen Sort Category.

Filter - when you click the Filter icon ⏚ , the screen expands to reveal a series of text fields and drop-down fields. You can use one or multiple of these fields to filter the data in the Holiday list. Click the Filter icon again to close the filter.

- Name - use this text field to enter a Holiday name, or a partial name ("Christmas Day", or just "Christmas", "Day", "C", etc.)

- Repeats Annually - use the drop-down menu and select from the list of options (Any, Repeats, Doesn't Repeat).

- Start Date - click the calendar 📅 icon, then use the interactive calendar to select the start date of your Holiday.

- End Date - click the calendar 📅 icon, then use the interactive calendar to select the end date of your Holiday.

- " ⬜ Include regions above" - Click the slider icon to show Holidays that belong to any parent regions.

    When enabled, the slider will be blue and to the right 🔵

- " ⬜ Include regions below" - Click the slider icon to show Holidays that belong to any sub-regions.

    When enabled, the slider will be blue and to the right 🔵

- "Apply" button - click this button to apply your filter criteria to the list of Holidays

- "Reset" button - click this button to clear your filter criteria

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to Reset the filter to see the full list of Holidays

Displaying/Navigating the Holiday list

There are additional tool icons and buttons located at the bottom of the list of Holidays that allow you to modify how the data in the list is presented:

Rows Per Page - click the drop-down menu [▾] to select the number of rows of data you want displayed per page.

First Page - click the [«] button to navigate to the first page of data.

Previous Page - click the [‹] button to navigate to the previous page of data.

Next Page - click the [›] button to navigate to the next page of data.

Last Page - click the [»] button to navigate to the last page of data.

Applying a Holiday to a Lock System

Please refer to the Lock Systems section, under "Assignments".

Schedule Management

The Schedule Management screen can be used to define blocks of time during which access to the lock system is restricted. Schedules can be added, edited, or deleted using the tools available on the Schedule Management screen.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

- ◆ Creating a New Schedule ◆ Creating,_Editing, and Deleting Timeblocks ◆ Creating a Timeblock
- ◆ Schedule Details window ◆ Editing a Timeblock ◆ Deleting a Timeblock
- ◆ Editing a Schedule ◆ Deleting a Schedule◆ Searching/Filtering the Schedules list
- ◆ Displaying/Navigating the Schedule list ◆ Applying a Schedule to a Lock System

Creating a New Schedule

To create a new Schedule, do the following:

1. From the Schedule Management screen, click the Add icon ➕ located at the bottom of the screen.
2. Click the Name field and enter a name for your Schedule.
3. Use the interactive Calendar to select time blocks for your Schedule. See "Creating, Editing, and Deleting Time Blocks" for details.
4. Click the Save button to create the new Schedule.

Creating, Editing, and Deleting Timeblocks

When creating a new Schedule, you are presented with an interactive calendar to which you can create Schedule Timeblocks of varying duration. The calendar allows for the creation of timeblocks anywhere in the 24-hour time frame for each of the seven weekdays. Systems that use Schedules use timeblocks to define when access is allowed.

Note: Schedules can contain a maximum of 35 user created timeblocks.

Creating a Timeblock

Creating time blocks can be done by either of the following methods:

- **click-and-drag**: click anywhere on the interactive calendar to quickly create a single 10-minute time block, or click and drag anywhere on the calendar to create a time block of any length.

  Note: When using the click-drag approach, the timeblocks created consist of 10-minute chunks that start and end at :00, :10, :20, :30, :40, or :50. If you want to create timeblocks that start or end at any other time, or are not set up in 10-minute chunks, double-click the calendar to open the Schedule Details window.

- **double-click**: create a timeblock by clicking anywhere on the interactive calendar, then double-click the newly created Time Block to open the Schedule Details window.

Schedule Details window

The Schedule Details window provides the following fields to allow you to customize the time block you have selected:

- **Start Date**
  - Start Day: use the drop-down menu to select the day of the week the timeblock begins.

  - Start Time: use the drop-down menu to select the time of day the timeblock begins. Select both the hour (0-23) and minute (0-59).

- **End Date**
  - End Day: use the drop-down menu to select the day of the week the timeblock ends.

  - End Time: use the drop-down menu to select the time of day the timeblock ends. Select both the hour (0-23) and minute (0-59).

Once the Schedule details have been set to your liking, click the OK button to return to the interactive calendar.

Editing a Timeblock

You can edit existing timeblocks by doing one of the following:

- Hover your mouse cursor over an existing timeblock. A dotted line will appear at the top and bottom edges of the timeblock. Move your mouse cursor over the dotted line, and when it turns into the double-arrow icon ↕, use your mouse to click-and-drag either edge of the timeblock to change the beginning and endpoint of the blocking period.

- Double-click an existing timeblock to open the Schedule Details window, where you can change/edit the start and end of the timeblock.

Deleting a Timeblock

You can delete existing timeblock timeblocks by doing one of the following:

- Hover your mouse cursor over the timeblock you want to delete, then click the Delete button 🗑 (trashcan).

- Hover your mouse cursor over an existing timeblock, then right click the timeblock and click "Delete". This method is useful for narrow/short timeblocks where the trashcan icon may not be visible.

Editing a Schedule

To Edit a Schedule, do the following:

1. From the Schedule Management screen, locate the name of the Schedule you want to edit, and click the Edit button ✏ (pencil).
2. If you want to edit the Name of the Schedule, click the Name field and enter a new name for your schedule.
3. Use the interactive calendar to add, edit, or delete time blocks on your schedule.
4. After making changes to a Schedule, click the Save button to store the changes.

Deleting a Schedule

To Delete a Schedule, do the following:

1. From the Schedule Management screen, locate the name of the Schedule you want to delete, then click the Delete button 🗑 (trashcan)
2. Confirm that you want to delete the Schedule by clicking the "Yes" button in the Delete Confirmation popup window.

Searching/Filtering the Schedules list

There are three useful tool icons located at the top of the Schedule Management screen that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon 📋 to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the Schedules in ascending 🔺 or descending 🔻 order based on the chosen Sort Category.

Filter - when you click the Filter icon ▽ , the screen expands to reveal a series of text fields and drop-down fields. You can use one or multiple of these fields to filter the data in the Schedules list. Click the Filter icon again to close the filter.

- Name - use this text field to enter a Schedule name, or a partial name ("Morning Shift", or just "Morning", "M", etc.)

- Type - use the drop-down menu and select from the list of Schedule Types (Blocking Schedule, or Access Schedule).
- " ⬤ Include regions above" - Click the slider icon to show Schedules that belong to any parent regions.

    When enabled, the slider will be blue and to the right. ⬤

- " ⬤ Include regions below" - Click the slider icon to show Schedules that belong to any sub-regions.

    When enabled, the slider will be blue and to the right. ⬤

- "Apply" button - click this button to apply your filter criteria to the list of Schedules

- "Reset" button - click this button to clear your filter criteria

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to Reset the filter to see the full list of Schedules

Displaying/Navigating the Schedule list

There are additional tool icons and buttons located at the bottom of the list of Schedules that allow you to modify how the data in the list is presented:

Rows Per Page - click the drop-down menu [▾] to select the number of rows of data you want displayed per page.

First Page - click the [K] button to navigate to the first page of data.

Previous Page - click the [‹] button to navigate to the previous page of data.

Next Page - click the [›] button to navigate to the next page of data.

Last Page - click the [»] button to navigate to the last page of data.

Applying a Schedule to a Lock System

Please refer to the Lock Systems section, under "Assignments".

User Management

This menu contains tools allowing authorized users the ability to add, edit, or delete Users using the Apexx Series software. Two user categories exist in an Apexx Series Software system: **Software Users** and **Lock Users**.

- **"Software Users"** refers to users who are authorized to run the Apexx Series Software and use the software tools to perform management and administrative tasks.

- **"Lock Users"** refers to users who will be utilizing Lock Systems (consisting of Keypads, Locks, etc.), and will have unique credentials and roles assigned to them with permissions that dictate their system access.

The **"Role Management"** screen allows you to create Roles, which are used to configure the administrative and read/write privileges for Software Users within Apexx Series Software. Once a Role has been defined, it can be assigned to one or more Software Users.

The **"Lock Access Groups"** screen allows you to create specialized "Lock Access Groups" that can be used to group users together and define the Lock Systems they have access to as well as the locks within those systems that they have access to.

Follow the links below for details about each of the following topics:

Software Users

Lock Users

Role Management

Lock Access

Groups

Software Users

 "Software Users" refers to users who are authorized to run the Apexx Series Software and use the software tools to perform management and administrative tasks.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software User Permissions for details.

📖 Topics:

- ◆ Searching/Filtering the Software User list ◆ Displaying/Navigating the Software User list
- ◆ Creating a New Software User ◆ Editing a Software User ◆ Deleting a Software User
- ◆ Software User Permissions

Searching/Filtering the Software User list

There are three useful tool icons located at the top of the list of Software Users that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the Software Users in ascending ▲ or descending ▼ order based on the chosen Sort Category.

Filter - when you click the Filter icon ▽ , the screen expands to reveal a series of text fields and drop-down fields. You can use one or more of these to filter the data in the Software User list. Click the Filter icon again to close the filter.

The following filter categories can be used to search through the Software Users in your system:

- Username
- Login Provider (choose from All, Negotiate, Google)
- Login Provider ID

Use one or more of these to filter the list of Users on the Software User page, then click the "Apply" button.

If you would like to remove/clear the filter, click the "Reset" button.

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to Reset the filter to see the full list of Software Users

Displaying/Navigating the Software User list

There are additional tool icons and buttons located at the bottom of the list of Software Users that allow you to modify how the data in the list is presented:

Rows Per Page - click the drop-down menu to select the number of rows of data you want displayed per page.

First Page - click the ⸜ᴋ⸝ button to navigate to the first page of data.

Previous Page - click the ⸜‹⸝ button to navigate to the previous page of data.

Next Page - click the ⸜›⸝ button to navigate to the next page of data.

Last Page - click the ⸜»⸝ button to navigate to the last page of data.

Creating a New Software User

To create a new Software User, do the following:

1. From the main menu, click User Management > Software Users

2. From the Software User screen, click the Add icon located at the bottom of the screen.

3. Use the text boxes and drop-down menus to edit the Username, Login Provider, and Login Provider ID.

4. Use the sliders provided to assign one or more Regions and Roles to the new Software User. A Region or Role is assigned when the slider is blue and to the right . A Region or Role is unassigned when the slider is grey and to the left .

5. Under "Permissions", click the slider icons to set the Software User's read and write privileges. A permission is enabled when the slider is blue and to the right . A permission is disabled when the slider is grey and to the left . See Software User Permissions for more details.

6. Click the Save button to create the new Software User.

Editing a Software User

To edit a Software User, do the following:

1. From the main menu, click User Management > Software Users

2. From the Software User screen, locate and double-click the name of the Software User you want to edit, or click the corresponding Edit button (pencil).

3. If desired, use the text boxes and drop-down menus to edit the Username, Login Provider, Login Provider ID fields.

4. Use the sliders provided to make changes to the Region and Role assignments for the Software User. A Region or Role is assigned when the slider is blue and to the right . A Region or Role is unassigned when the slider is grey and to the left .

5. Under "Permissions", click the slider icons to change the Software User's read and write privileges. A permission is enabled when the slider is blue and to the right . A permission is disabled when the slider is grey and to the left . See Software User Permissions for more details.

6. Click the Save button to save the changes made to the Software User.

Deleting a Software User

To Delete a Software User, do the following:

1. From the Software User screen, locate the name of the Software User you want to delete, then click the corresponding Delete button (trashcan)

2. Confirm that you want to delete the Software User by clicking the "Yes" button in the Delete Confirmation popup window.

Software User Permissions

"Read" permissions allow a Software User the ability to access and view certain information and/or screens in Apexx Series Software.

"Write" permissions allow a Software User the ability to access, view, and edit certain information and/or screens in Apexx Series Software.

"Permissions" details:

The following is a list of the screens/tools and the permissions needed to view/edit (read/write) them:

- Dashboard - N/A (anyone can view)

- Region Management - need read/write "regions"

- Lock Users - need read/write "lockusers"

- Software Users - need read/write "softwareusers"

- Role Management - need read/write "softwareusers"

- Lock Access Groups - need read/write "lockusers"

- Lock Systems - need read/write "locksystems"

- Add Devices - need "admin"

- Lock Groups - need read/write "locksystems"

- Roles - need read/write "locksystems"

- USB Communication - N/A (anyone can use)

- Schedule Management - need read/write "time"

- Holiday Management - need read/write "time"

- Audit Report - need read "reports" and "admin"

- Hardware Delta Report - need read "reports" , read "locksystems", read "time", and read "lockusers"

- Software User Report - need read "reports" and read "softwareusers"

- Lock System Users Report - need read "reports" and read "lockusers"

- Firmware Report - need read "reports"

- System Log Report - need read "reports" and "admin"

- Scheduled Report - need read "reports" and "admin"

- Audit Event Settings - need read/write "events"

- Firmware Management - need "admin" and "Apexx Maintenance" license

- Certificate Management - need "admin"

- Registration - anyone can view, but need "admin" to write

Lock Users

"Lock Users" refers to users who will be utilizing Lock Systems (consisting of Keypads, Locks, etc.), and will have unique credentials and roles assigned to them with permissions that dictate their system access.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

◆ About Lock User PINs ◆ Searching/Filtering the Lock User list ◆ Displaying/Navigating the Lock User list

◆ Creating a New Lock User ◆ Editing a Lock User ◆ Lock User Status ◆ Lock User - Duress

◆ Viewing Lock Access ◆ Deleting a Lock User

Important! About Lock User PINs

NOTE: Whenever a Lock User is added or edited, the software will assign them a new randomly generated PIN. Please note the following regarding User PIN creation and management:

- Ensure that the PIN is given to the Lock User in a secure way.

- When the Lock User uses this code to gain entry to the system using the Apexx keypad, it is valid one time only. After the initial entry, the Lock User will be prompted to immediately change their PIN.

- For improved security, instruct all Lock Users to ensure that they choose PINs that are not simple (e.g. 1-2-3-4-5-6) or easy to guess (based on dates, addresses, etc.)

Searching/Filtering the Lock User list

There are three useful tool icons located at the top of the list of Lock Users that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the Lock Users in ascending ▲ or descending ▼ order based on the chosen Sort Category.

Filter - when you click the Filter icon , the screen expands to reveal a series of text fields and drop-down fields. You can use one or more of these to filter the data in the Lock User list. Click the Filter icon again to close the filter.

The following filter categories can be used to search through the Lock Users in your system:

- First Name

- Last Name

- Status (choose from Any, Active, or Inactive)

- Duress (choose from Any, Under Duress, or Not Under Duress)

- Email Address

- Phone Number

- Lock Access Group

- Role

- User ID

- "⬤▢ Include regions above" - Click the slider icon to show Lock Users that belong to any parent

  regions. When enabled, the slider will be blue and to the right ⬤▬ .

- "⬤▢ Include regions below" - Click the slider icon to show Lock Users that belong to any sub-regions.

  When enabled, the slider will be blue and to the right ▬⬤ .

Use one or more of these to filter the list of Users on the Lock Users page, then click the "Apply" button. If

you would like to remove/clear the filter, click the "Reset" button.

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to Reset the filter to see the full list of Lock Users

Displaying/Navigating the Lock User list

There are additional tool icons and buttons located at the bottom of the list of Lock Users that allow you to modify how the data in the list is presented:

Rows Per Page - click the drop-down menu ▢▾ to select the number of rows of data you want displayed per page.

First Page - click the ◁ button to navigate to the first page of data.

Previous Page - click the ‹ button to navigate to the previous page of data.

Next Page - click the › button to navigate to the next page of data.

Last Page - click the ▷ button to navigate to the last page of data.

Creating a New Lock User

To create a new Lock User, do the following:

1. From the main menu, click User Management > Lock Users

2. From the Lock User screen, click the Add icon located at the bottom of the screen.

3. Use the "Active" and "Duress" buttons to toggle between Active/Inactive and Duress On/Off states. **Note:** The Duress button is only visible when a Lock User uses the keypad to trigger the Duress condition.

4. In the fields provided, enter a First Name, Last Name, Phone Number, User ID, and Email Address for the Lock User. **Note:** Fields highlighted in red are mandatory.

5. To select a Lock System Group and Role, use their respective drop-down menus and choose one of the options. For more information, see Lock Groups and Roles.

6. Use the slider next to "Can Skip Time Delay" to allow the Lock User the ability to skip Time Delay periods.

    When the slider icons is grey and to the left, this feature is disabled. When the slider icon

    is blue and to the right, this feature is enabled.

7. To set the User's access rights, click the icon, then choose one of the following options:

    • **"Add Access Group"** - you will be presented with a list of all Lock Access Groups in your Region. Click the slider icon next to each Lock Access Group name to select it. Lock Access Groups that are

       not selected will have grey slider icons next to their respective names . To select a Lock Access Group, click the associated slider icon to move the slider to the right so that it turns blue

        .Click the "Add" button when you are finished to assign the user to the selected Lock Access Group(s).

    • **"Create New Lock Access Group"** - you will be presented with a text field in which you can enter a new Lock Access Group Name. Once you've entered a name, click the "Save" button to create the new Lock Access Group. See Lock Access Groups for more details on how to configure the new Lock Access Group.

8. Click the Save button to create the new Lock User.

9. A pop-up window will open showing that the User has been assigned a PIN. You can click the "Copy" button to copy this new PIN assignment info to the clipboard, so that this information can be stored in a secure place by the system administrator.

10. Click the "OK" button to close the pop-up window.

NOTE: if you created a new Lock Access Group, you will be asked if you would like to configure the new Lock Access Group. Clicking "Yes" will take you to the Lock Access Group details page (see Lock Access Groups for details)

Editing a Lock User

To Edit a Lock User, do the following:

1. From the main menu, click User Management > Lock Users

2. From the Lock User screen, locate and double-click the name of the Lock User you want to edit, or click

   the corresponding Edit button ✎ (pencil).

3. Edit the "Active" and "Duress" status of the Lock User by clicking the respective buttons to toggle between Active/Inactive and Duress On/Off states.

4. If you want to edit the Given Name, Surname, Contact Number, Lock User ID, or Email Address of the Lock User, click the respective text box and enter/edit the contents.

5. To change the Lock System Group or Role, use their respective drop-down menus and choose one of the options. For more information, see Lock Groups and Roles.

6. Use the slider next to "Can Skip Time Delay" to enable/disable the ability to skip Time Delay

   periods. When the slider icons is grey ⬤▭ and to the left, this feature is disabled. When the slider icon is

   blue ▭⬤ and to the right, this feature is enabled.

7. To change the User's access rights, you can remove the User from a Lock Access Group by clicking on the

   associated trashcan icon 🗑 , or click the ⊕ icon, then choose one of the following options:

   - **"Add Access Group"** - you will be presented with a list of all Lock Access Groups in your Region. Click the slider icon next to each Lock Access Group name to select it. Lock Access Groups that are

     not selected will have grey slider icons next to their respective names ⬤▭ . To select a Lock Access Group, click the associated slider icon to move the slider to the right so that it turns blue

     ▭⬤ .Click the "Add" button when you are finished to assign the user to the selected Lock Access Group(s).

   - **"Create New Lock Access Group"** - you will be presented with a text field in which you can enter a new Lock Access Group Name. Once you've entered a name, click the "Save" button to create the new Lock Access Group. See Lock Access Groups for more details on how to configure the new Lock Access Group.

8. You can generate a new User PIN by clicking the "**Generate New PIN" button**, then do the following:

   a. Click the "Yes" button to confirm that you want to generate a new PIN.

   b. A pop-up window will open containing the new User PIN. You can click the "Copy" button to copy this new PIN assignment info to the clipboard, so that this information can be stored in a secure place by the system administrator.

   c. Click the "OK" button to close the pop-up window.

9. After making changes to a Lock User, click the Save button to store the changes.

Lock User Status

A Lock User's status is a setting used to control a User's access to a lock system. A Lock User's Status can be set to Active or Inactive.

Active When a User's Status is "Active", they can enter their User ID and PIN at the keypad to gain access to the lock system.

Inactive When a User's Status is "Inactive", they will be unable to gain access to the lock system, and will result in an Invalid Entry when they enter their User ID and PIN at the keypad.

To change a Lock User's Status, do the following:

1. From the main menu, click User Management > Lock Users

2. From the Lock User screen, locate the name of the Lock User you want to edit, and click the Edit button (pencil).

3. Click the colored User Status icon to change the status from Active to Inactive, or vice versa.

4. Confirm you want to make the change by clicking "Yes" in the popup window.

5. Click the Save button.

Lock User - Duress

The Lock System can be configured such that when a Lock User enters a Duress Combination at the keypad, a silent alarm signal can be generated, and an Audit recorded to signify that an emergency situation (such as a robbery attempt) has occurred.

Duress When a User has entered a Duress Combination at the keypad, Apexx Series Software will indicate this by displaying a red Duress icon next to their name in the Lock User details screen.

Once the situation that resulted in the Duress mode being triggered has been investigated and resolved, you can turn off the Duress state for a given User by doing the following:

1. From the main menu, click User Management > Lock Users

2. From the Lock User screen, locate the name of the Lock User you want to edit, and click the Edit button (pencil).

3. Click the red Duress icon to remove the Duress state.

4. Confirm you want to make the change by clicking "Yes" in the popup window.

5. Click the Save button.

Please refer to the Lock Systems section for information on how to enable Duress mode for your Lock System. For more information on Duress Mode, consult the Apexx System User Guide.

Viewing Lock Access

The "Lock Access" section of the Lock User details screen contains a list of the Locks that a particular Lock User has access to. These details include the Lock System and Lock Group the locks belong to, the Role the Lock User has, and the specific locks they are assigned to.

Note: Lock access is setup/defined in Lock Access Groups

The Change Order icon (blue triangle) located above the list of locks can be used to rank the list by Region name, or Lock System name. Simply click one of the column headings on the Lock Access list, then click the Change Order icon to sort the data by that criteria. When the blue triangle is pointing up ▲, the data will appear in ascending order. When the blue triangle is pointing down ▼, the data will appear in descending order.

There are additional tool icons and buttons located at the bottom of the Lock Access list that allow you to modify how the data in the list is presented:

Rows Per Page - click the drop-down menu ⬚ to select the number of rows of data you want displayed per page.

First Page - click the ⏮ button to navigate to the first page of data.

Previous Page - click the ‹ button to navigate to the previous page of data.

Next Page - click the › button to navigate to the next page of data.

Last Page - click the ⏭ button to navigate to the last page of data.

Deleting a Lock User

To Delete a Lock User, do the following:

1. From the Lock User screen, locate the name of the Lock User you want to delete, then click the Delete button 🗑 (trashcan)

2. Confirm that you want to delete the Lock User by clicking the "Yes" button in the Delete Confirmation popup window.

Role Management (Software Users)

Roles are used to configure the administrative and read/write privileges for Software Users within Apexx Series Software. Once a Role has been defined, it can be assigned to one or more Software Users.

NOTE: Only Software Users with adequate permissions can view and edit the contents of this screen. See Software Users for details concerning permissions.

📖 Topics:

◆ Creating a new Role◆ Editing a Role◆ Deleting a Role

Creating a new Role

To create a new Role, do the following:

1. From the main menu, click User Management > Role Management

2. From the Role Management screen, click the Add icon ⊕ located at the bottom of the screen.

3. Use the text boxes to enter a Name for the new Role, then use the drop-down menu to select the Tenant/Region.

4. Click the slider icons to set the admin and read/write privileges. A privilege is enabled when the slider is blue and to the right 🔵. A privilege is disabled when the slider is grey and to the left ⚪ .

5. Click the Save button to create the new Role.

Editing a Role

To create a new Role, do the following:

1. From the Role Management screen, click the name of the Role you want to edit.

2. Use the text boxes and drop-down menus to edit the Name and Tenant/Region.

3. Click the slider icons to set the admin and read/write privileges. A privilege is enabled when the slider is blue and to the right 🔵. A privilege is disabled when the slider is grey and to the left ⚪ .

4. Click the Save button.

Deleting a Role

To Delete a Role, do the following:

1. From the Role Management screen, locate the name of the Role you want to delete, then click the Delete button 🗑 (trashcan)

2. Confirm that you want to delete the Role by clicking the "Yes" button in the Delete Confirmation popup window.

Lock Access Groups

The Lock Access Groups screen allows you to create specialized "Lock Access Groups" that can be used to group users together and define the Lock Systems they have access to as well as the locks within those systems that they have access to.

📖 Topics:

- ◆ Lock Access Groups - Examples ◆ Creating a New Lock Access Group
- ◆ Assigning Lock Systems to Lock Access Groups ◆ Assigned Locks◆ Editing a Lock Access Group
- ◆ Removing a Lock System from a Lock Access Group ◆ Deleting a Lock Access Group
- ◆ Searching/Filtering the Lock Access Groups list ◆ Displaying/Navigating the Lock Access Groups list

Lock Access Groups - Examples
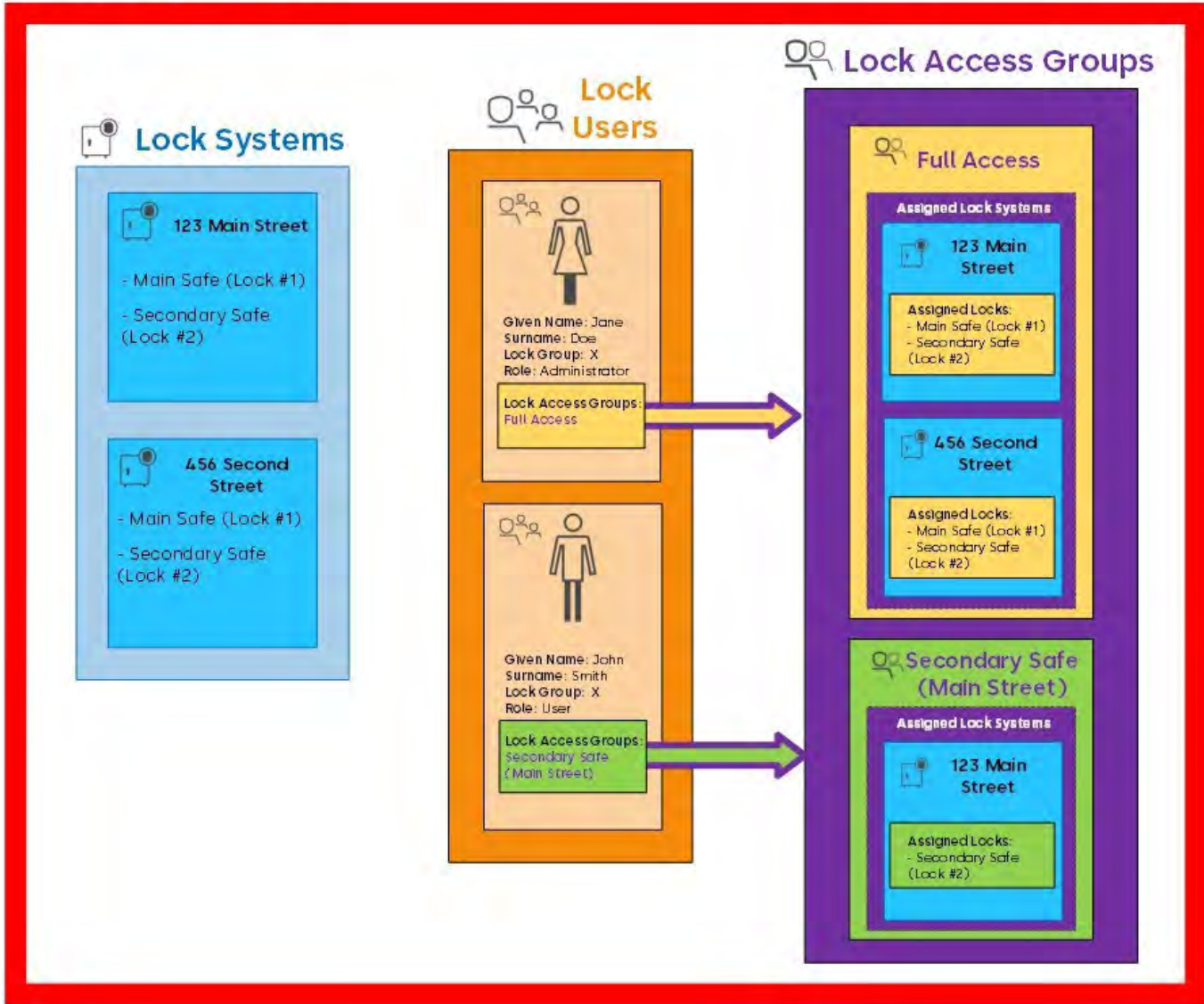
The image above illustrates how Lock Access Groups can be used in a simple Region consisting of 2 Lock Systems and 2 Users.

In this example, 2 Lock Access Groups have been created: "Full Access" and "Secondary Safe (Main Street)".
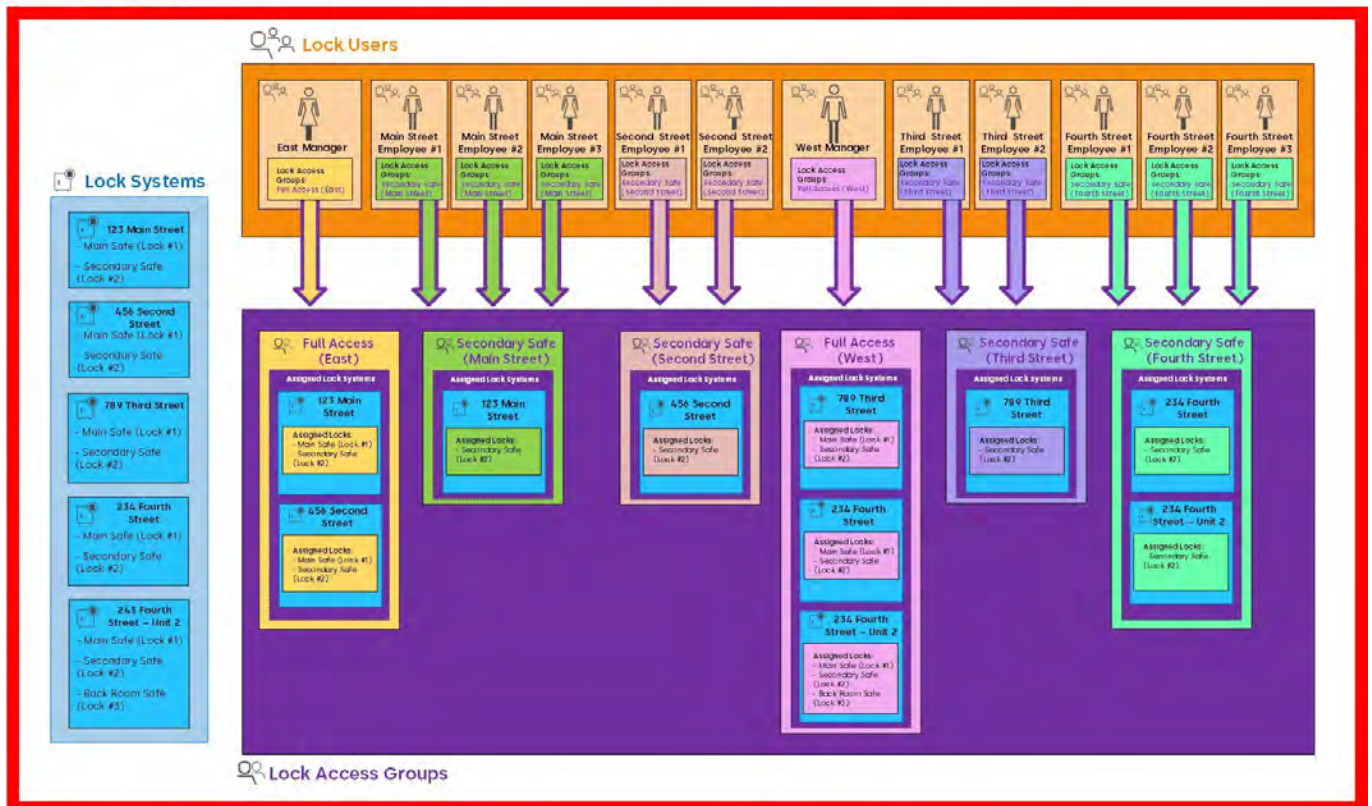
The image above illustrates how Lock Access Groups can be used in a slightly larger Region consisting of 5 Lock Systems and 12 Users. In this example, 6 Lock Access Groups have been created: "Full Access (East)", "Secondary Safe (Main Street)", "Secondary Safe (Second Street)", "Full Access (West)", "Secondary Safe (Third Street)", and "Secondary Safe (Fourth Street)". This setup easily and effectively allows an administrator to define and categorize Users using Lock Access Groups based on their respective organizational roles and define their access to Locks and Lock Systems accordingly.

Creating a New Lock Access Group

To create a new Lock Access Group, do the following:

1. From the Lock Access Groups screen, click the Add icon ⊕ located in the bottom right corner of the screen.

2. A Window will open that allows you to edit the following fields/settings:

    • **Name** - The name used to identify the Lock Access Group in the software. To Name the new Lock Access Group, simply type a new name in the text-box provided.

    • **"Lock Systems"** - This area contains a list of all Lock Systems that are available in a given Region. You can add one or more Lock Systems to any given Lock Access Group.

   • **"Assigned Locks"** - This area allows you to choose which of the selected Lock System's Locks that the users belonging to this Lock Access Group are assigned to.

3. Click the Save button to create the new Lock Access Group.

Assigning Lock Systems to Lock Access Groups

Lock User Groups can consist of one or more Lock Systems. To assign a Lock System to a Lock Access Group, do the following:

1. From the Lock Access Groups screen under "Lock Systems", click the Add icon located on the bottom of the screen.

   2. In the "Add Lock System" window, use the slider icons next to each Lock System to select whether or not to add it to the Lock Access Group. Lock Systems that are not selected will have grey slider icons next to their respective names . To select a Lock System, click the associated slider icon to move the slider to the right so that it turns blue .

3. Click the "Add" button. The window will close and the Lock System(s) you selected will appear in your Lock Systems list.

4. Click the "Save" button to add the selected Lock System(s) to the Lock Access Group.

Assigned Locks

This area allows you to define the Lock access for each of the Lock Systems assigned to the Lock Access Group. Configure the Assigned Locks by doing the following:

1. Click one of the Lock Systems in the Lock Access Group's "Lock Systems" list to edit its respective Assigned Locks.

2. Under "Assigned Locks" use the sliders next to each lock name to select the lock(s) you wish to assign to the Lock Access Group. Locks that are not selected will have grey slider icons next to their respective names . To assign a Lock, click the associated slider icon to move the slider to the right so that it turns blue .

3. Click the Save button to apply the chosen Assigned Locks to the Lock Access Group.

Editing a Lock Access Group

To Edit a Lock Access Group, do the following:

1. From the Lock Access Groups screen, locate the name of the Lock Access Group you want to edit and click the Edit button (pencil).

2. A Window will open that allows you to edit the following fields:

   - **Name** - The name used to identify the Lock Access Group in the software. To Edit the Name, simply type a new name in the textbox provided.

   - **"Lock Systems"** - This area contains a list of all Lock Systems that are available in a given Region. You can add one or more Lock Systems to any given Lock Access Group.

   - **"Assigned Locks"** - This area allows you to choose which of the selected Lock System's Locks that the users belonging to this Lock Access Group are assigned to.

3. Click the Save button to store the changes.

Removing a Lock System from a Lock Access Group

Lock Access Groups can consist of one or more Lock Systems. To remove a Lock System from a Lock Access Group, do the following:

1. From the Lock Access Groups screen under "Lock Systems", click the Subtract/Remove icon ⊖ located on the bottom of the screen.

2. In the "Remove Lock Systems" window, use the slider icons next to each Lock System to select whether or not to remove it from the Lock Access Group. Lock Systems that are not selected will have grey slider icons next to their respective names   ⬜. To select a Lock System, click the associated slider icon to move the slider to the right so that it turns red   🔴   .

3. Click the "Save" button to remove the selected Lock System(s) from the Lock Access Group.

4. Click "OK" In the Delete Confirmation window to confirm your choice.

Deleting a Lock Access Group

To Delete a Lock Access Group, do the following:

1. From the Lock Access Groups screen, locate the name of the Lock Access Group you want to delete, then click the Delete button   🗑   (trashcan).

2. Confirm that you want to delete the Lock Access Group by clicking the "**Yes**" button in the Delete Confirmation popup window.

Searching/Filtering the Lock Access Groups list

There are three useful tool icons located at the top of the list of Lock Access Groups that allow you to modify how the data in the list is presented:

Sort Category - click the Sort Category icon ▦ to select the category by which the data contained in the table can be sorted/ordered.

Change Order - once a Sort Category has been selected, click the blue Change Order icon to rank the Lock Access Groups in ascending ▲ or descending ▼ order based on the chosen Sort Category.

Filter - when you click the Filter icon ▽ , the screen expands to reveal a series of text fields and drop-down fields. You can use one or more of these to filter the data in the Lock User list. Click the Filter icon again to close the filter.

The following filter categories can be used to search through the Lock Access Groups in your system:

- Name

- "⬤▭ Include regions above" - Click the slider icon to show Lock Access Groups that belong to any parent regions. When enabled, the slider will be blue and to the right ▬⬤ .

- "⬤▭ Include regions below" - Click the slider icon to show Lock Access Groups that belong to any sub-regions. When enabled, the slider will be blue and to the right ▬⬤ .

Use one or more of these to filter the list, then click the "Apply" button.

If you would like to remove/clear the filter, click the "**Reset**" button.

NOTE: closing the filter does not clear the filter, so if you have filtered the results, you will have to Reset the filter to see the full list of Lock Access Groups

Displaying/Navigating the Lock Access Groups list

There are additional tool icons and buttons located at the bottom of the list of Lock Access Groups that allow you to modify how the data in the list is presented:

Rows Per Page - click the drop down menu ▭▾ to select the number of rows of data you want displayed per page.

First Page - click the �K button to navigate to the first page of data.

Previous Page - click the ‹ button to navigate to the previous page of data.

Next Page - click the › button to navigate to the next page of data.

Last Page - click the » button to navigate to the last page of data.

Apexx Series Software Overview

📖 Topics:

◆ Using Apexx Series Software to configure a Lock System ◆ Icons & Symbols ◆ Main Menu

Using Apexx Series Software to configure a Lock System

- See Directory Sync Mode for information on how to configure your lock system using a networked connection (Apexx eBox required)

- See USB Communication for information on how to configure your lock system using a USB connection
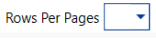
Icons & Symbols

Throughout the Apexx Series Software interface screens, you will see the following symbols. Each symbol is explained below.

Symbol(s)	What is it?	How to use it
→	Working Region Selection Arrow	Click this arrow to open the Working Region selection screen. Clicking the arrow a second time will close the Working Region selection screen
›	Open Menu Arrow	Click the arrow next to one of the software main menu categories to reveal the corresponding sub-menu topics
←	Back Button	Click to return to the previous screen in a sub-menu
🟢 🔴	Language Button / MQTT Status indicator	*coming soon * Clicking this button opens a list of all available languages. Clicking one of the options will change all labels and menus to the language you have selected. This icon will appear Green when the connection to the MQTT broker is Connected, and appears RED when Disconnected
✏	Edit Button	Click the button to make changes to certain settings.
🗑	Delete Button	Click this button to erase the current selection. A window will open asking you to confirm.
👁	View Button	Click the button to view the properties/settings of the item it appears next to.

☑	Selectable Option - Enabled	Clicking in the box alternately selects - has a check-mark - or de-selects - has no check-mark - on each subsequent click
⬤▬		In some instances, sliders are used to enable (blue, slider to the right) and disable (white/grey, slider to the left) certain features. Click the slider icon to toggle between enabled and disabled.
☐ ▬○	Selectable Option - Disabled	Clicking in the box alternately selects - has a check-mark - or de-selects - has no check-mark - on each subsequent click
		In some instances, sliders are used to enable (blue, slider to the right) and disable (white/grey, slider to the left) certain features. Click the slider icon to toggle between enabled and disabled.
▬○	Non-Selectable Option - Enabled	Non-selectable options are governed by other selectable options or other settings and cannot be manually changed
☐	Non-Selectable Option - Disabled	Non-selectable options are governed by other selectable options or other settings and cannot be manually changed
▾ ▾	Drop Down List	Position the cursor over the arrow and click to open the drop down list/menu
ⓘ	Info Button	Click this button to learn more about a given software screen or feature
🔍	Discover Devices Button	Used during USB . Click this button to search for devices connected to your computer
⊕ ⊕	Add Button	Found in many different sections of the software. Click this button to create/ add a new Tenant, Holiday, Role, etc.
📅 📅	Date Selection	Position the cursor over the calendar and click to open. Use the arrows to scroll back or forward in the calendar. Click the name of the Month/Year to quickly navigate to a different Month and Year.

Active	Active/Inactive button - "Active"	Shows the state of Lock Users, Lock Groups, Lock Access Groups, etc. Click the button to change from Active to Inactive.
Inactive	Active/Inactive button - "Inactive"	Shows the state of Lock Users, Lock Groups, Lock Access Groups, etc. Click the button to change from Inactive to Active.
	Sort Category	Allows you to select various categories by which the data contained in the table This tool appears above certain tables can be sorted.
	Filter	This tool appears above certain tables and allows you to filter the data within the table.
Rows Per Pages	Rows Per Page	This tool appears below certain tables and allows you to select how many rows of data you want displayed on each page. Click the arrow to open the drop-down menu, then select a number from the list.
	First page	This tool appears below certain tables and allows you to navigate to the first page of data. The data will be displayed according to your ranking/ filtering criteria.
	Previous page	This tool appears below certain tables and allows you to navigate to the previous page of data. The data will be displayed according to your ranking/ filtering criteria.
	Next page	This tool appears below certain tables and allows you to navigate to the next page of data. The data will be displayed according to your ranking/ filtering criteria.
	Last page	This tool appears below certain tables and allows you to navigate to the last page of data. The data will be displayed according to your ranking/ filtering criteria.
	Sort Symbols	If you click certain table headings, you can sort/rank the data ascending (arrow pointing up) or descending (arrow pointing down) numerically or alphabetically. Click the column heading to toggle between the different sorting methods.

Main Menu

Located on the left-hand side of the screen is a Main Menu column for rapid access to all Client software functions.

NOTE: Only Software Users with adequate permissions can view and edit the contents of the various screens. See Software Users for details concerning permissions.

Below is a brief description of each of the menu options:

Dashboard

The Dashboard screen presents an overview of your lock system, using graphs, charts, and other elements to show system status details.

Region Management

Add, Edit, or Delete Regions to/from your database.

User Management

Add, Edit, or Delete Users for both Software and Locks

Locks

Contains all software based Lock related tools for managing Lock Systems that utilize the Apexx eBox for networked connectivity, including the ability to Add/Commission devices, manage Lock Groups, Lock system Programming, and User Role management.

Also contained within this menu is "USB Communication", which contains the tools required to setup and configure lock systems using a USB connection.

Time

Manage Schedules by creating time blocks using an interactive calendar, and use the software to create and manage Holidays

Lock Access Groups

Create specialized "Locks Access Groups" that can be used to group users together and define the Lock Systems they have access to, Roles they hold, Lock access, and other permissions.

Reports

Create, customize, and view a variety of report types for key system data.

Application Settings

Contains the tools needed to manage firmware and certificates. It also allows an administrator the ability to create automated email alerts based on the occurrence of one or more user selected Audit Events.

Registration

Register your product and manage your Software Licenses.

Third-Party Sign-In Configuration

Signing into Apexx Series Software can be accomplished using different third-party authenticators to validate software user access. The following page outlines how to use various third-party services for authentication to allow you to sign in to Apexx Series Software.

📖 Topics:

◆ Google Cloud Setup ◆ Apexx Series Software Setup

Google Cloud Setup

Note: The steps may vary depending on your web browser and operating system. If any of these steps are unclear, consult the Google Cloud tutorial for further details.

1. In a web browser, go to https://console.cloud.google.com and log in to your Google account. Note: If this is your first time using the Google Cloud console, you must agree to the terms of service before proceeding.

2. In the Google Cloud upper menu bar at the top of the page, click the drop-down menu to select a project.

3. From the "**Select a Project**" screen, either click an existing project, or choose "**New Project**" to create a new project.

4. If creating a new project, do the following:

    a. Enter a project name in the space provided (**Note:** this name cannot be changed later, so it is recommended that you use a unique name to identify this project. "Apexx", "dormakaba", etc.)

    b. (Optional) Set a Location. This is optional and not covered here. If you wish to set a Location for your project, refer to the relevant Google documentation.

    c. Click the "Create" button.

    d. Once created, select your project using the drop-down menu located at the top of the page.

5. If this is your first time configuring an OAuth Client ID, you must first configure the OAuth consent screen. To configure the OAuth consent screen, do the following:

    a. Click the Google Cloud Navigation menu ☰ (located in the top left corner), then choose "**APIs & Services**" and click "OAuth consent screen".

    b. Click "Create".

    c. Proceed through the steps to configure and customize your OAuth consent screen.

6. Click the Google Cloud Navigation menu ☰ (located in the top left corner), then choose "**APIs & Services**" and click "**Credentials**".

7. Click "**Create Credentials**", then select "OAuth client ID".

8. Click the "**Application Type**" drop-down, then select "Desktop App".

9. Provide a name for your OAuth client in the space provided.

10. Click "**Create**". Once created, your OAuth client will appear in the "Credentials" screen under "OAuth 2.0 Client IDs".

11. Click the **OAuth Client ID** name from the list.

12. You will need to copy the "**Client ID**" and the "**Client Secret**", which you can do by simply copying the text on the screen, or downloading the JSON file (this file contains both numbers).

13. Click the Google Cloud Navigation menu in the top left corner, then choose "**IAM & Admin**".

14. On the "Permissions" screen, click "**Grant Access**".

15. Use the "**New principals**" field to enter one or more addresses/accounts to grant access to your project.

16. Assign roles to the new principals using the tools provided.

17. Click the "**Save**" button.

Apexx Series Software Setup

Note: The steps may vary depending on your web browser and operating system. If any of these steps are unclear, consult the Google Cloud tutorial for further details.

1. On your computer, use the file explorer to locate the folder where Apexx Series Software is installed.

2. Locate and open the "**Apexx Client.dll.config**" file (located in the "**Client**" folder).

3. Edit the **Apexx Client.dll.config** file to include the Client ID and Client Secret from your credentials created using Google Cloud. Simply add the highlighted text to the file within the <appSettings> tags as shown below:

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
  <appSettings>
    <add key="APIURL" value="https://localhost:5001"/>
    <add key="MQTTHost" value="localhost"/>
    <add key="MQTTPort" value="8883"/>
    <add key="ClientID" value="xxxxxx"/>
    <add key="ClientSecret" value="yyyyyy"/>
  </appSettings>
</configuration>
```

Note: The values in the yellow highlighted portion above should contain the Client ID and Client Secret values in place of the xxxxxx and yyyyyy respectively

4. Save and close the Apexx Client.dll.config file.

5. Locate and open the "**appsettings.json**" file (located in the "API" folder).

6. Edit the appsettings.json file to include the following:

```
"Authentication": {
    "Google": {
        "Authority": "https://accounts.google.com/", "Audience":
        "xxxxxx"

    }
},
```

Note: The xxxxxx in the snippet of code above should be replaced with your Client ID

7. Save and close the appsettings.json file.

9. Open the Apexx Series Software Client, then log in as an administrative user
    (**Note:** In this case, you'll need to log in as a Software User who has the ability to add new Software Users).

10. From the main menu, click "**User Management" > "Software Users**"

11. From the Software Users screen, click the Add icon ⊕ located at the bottom of the screen.

12. Use the text boxes and drop-down menus to edit the Username (set to a valid gmail address/account that was added to your Google Cloud project) and Login Provider (set to "Google").

13. Use the sliders provided to assign one or more Regions and Roles to the new Software User. A Region or Role is assigned when the slider is blue and to the right ⬤. A Region or Role is unassigned when the slider is grey and to the left ⚪ .

14. Under "Permissions", click the slider icons to set the Software User's read and write privileges. A permission is enabled when the slider is blue and to the right ⬤. A permission is disabled when the slider is grey and to the left ⚪ .

15. Click the Save button to create the new Software User.

16. Repeat steps 10 to 14 for any additional Software Users you wish to add.

17. Close the Client and restart the API and MQTT.

18. Re-open the Client. All users/accounts added to your project can now use the "Sign in with Google" button to log in to the Apexx Series Software client.

Directory Sync Mode

Lock systems that consist of an Apexx eBox and a networked connection to a computer hosting the Apexx Series Software allow an administrative Software User the ability to use the software to configure and change the lock system settings. A lock system using this method for management and configuration is said to be in "Directory Sync Mode".

Note: A Lock System is put into Directory Sync Mode when the first default administrator is sent to the lock system

If you do not have an eBox, see USB Communication for information on how to configure your lock system using a USB connection to Apexx Series Software.

📖 Topics:

◆ About Directory Sync Mode ◆ Directory Sync Mode - Lock Users

About Directory Sync Mode

When in Directory Sync Mode, the following aspects of lock system management are managed by Apexx Series Software and can no longer be modified using an Apexx Series Keypad:

- **"Manage Users"**
  - Adding, Editing, or Deleting Lock Users is managed on Apexx Series Software's Lock Users screen.

- **"Time/Date"**
  - If the lock system is in Directory Sync Mode, it will sync the date and time when it connects to software and when a change is made to the lock system settings via software.

- **"System Settings"**
  - All system settings are managed using Apexx Series Software's Lock Systems page under "System Configuration".

- **"Time Delay"**
  - All time delay settings are managed using Apexx Series Software's Lock Systems page under "Device Configuration".

- **"Weekly Time Lock"**
  - All weekly time lock settings are managed using Apexx Series Software's Schedule Management page.

- **"Holiday Time Lock"**
  - All holiday time lock settings are managed using Apexx Series Software's Holiday Management page.

- **"FW Update"**
  - Firmware files are managed using Apexx Series Software's Firmware Management page. See "Updating your device firmware" on the Lock Systems page for instructions on updating lock system firmware while in Directory Sync Mode.

Directory Sync Mode - Lock Users

In Directory Sync Mode, new Lock Users are pushed to the lock system via Apexx Series Software when one of the following actions occurs:

- A new Lock User is created and added to a Lock Access Group that has the lock system assigned to it
- When the lock system is assigned to a Lock Access Group. When this occurs, all active Lock Users assigned to that Lock Access Group will be pushed to the lock system.

Important! If an existing lock system is put into Directory Sync Mode, <u>all existing users on that lock system</u> <u>will be removed.</u> See Lock Users for details on how to add Lock Users to your lock system.

Our Sustainability Commitment

We are committed to foster a sustainable development along our entire value chain in line with our economic, environmental and social responsibilities toward current and future generations. Sustainability at product level is an important, future-oriented approach in the field of construction. In order to give quantified disclosures of a product's environmental impact through its entire life cycle, dormakaba provides Environmental Product Declarations (EPD), based on holistic life cycle assessments.

www.dormakaba.com/sustainability

Our offering

Access Automation Solutions

Entrance Automation
Entrance Security

Access Control Solutions

Electronic Access & Data
Escape and Rescue Systems
Lodging Systems

Access Hardware Solutions

Door Closers
Architectural Hardware
Mechanical Key Systems

Services

Technical Support
Installation and commissioning
Maintenance and Repair

Key & Wall Solutions

Key Systems
Movable / Sliding Walls

Safe Locks

Electronic Safe Locks
Mechanical Safe Locks
Boltworks and Accessories

Glass systems

Manual door systems
Glass fittings
Horizontal Sliding Walls

AXESSOR APEXX IP
INSTALLATION AND
OPERATION GUIDES

dk.world/AxessorApexxIP