



STANLEY® Wi-Q™ ACCESS MANAGEMENT SYSTEM
USER GUIDE

v3.1

STANLEY®
OMNILOCK®

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FCC/IC Certification

CAUTION: Please keep the PG antenna 20cm away from people to ensure that FCC RF exposure compliance requirements are not exceeded.

This equipment has been tested and found to comply with the limits for Class B Digital Device, pursuant to Part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference in a residential installation. This equipment generates and can radiate radio frequency energy and, if not installed and used in accordance with the instructions, may cause harmful interference to radio communications. However, there is no guarantee that interference will not occur in a particular installation. If this equipment does cause harmful interference to radio or television reception, which can be determined by turning the equipment off and on, you can try to correct the interference by taking one or more of the following measures.

- Reorient or relocate the receiving antenna
- Increase the separation between the equipment and receiver
- Connect the equipment into an outlet on a circuit different from that to which the receiver is connected
- Consult the dealer or an experienced radio/TV technician for help.

This device complies with Industry Canada licence-exempt RSS standard(s). Operation is subject to the following two conditions: (1) This device may not cause interference, and (2) this device must accept any interference, including any interference that may cause undesired operation of the device.

Cet appareil est conforme à la norme RSS Industrie Canada exempt de licence. Son fonctionnement est soumis aux deux conditions suivantes: (1) cet appareil ne doit pas provoquer d'interférences et (2) cet appareil doit accepter toute interférence, y compris les interférences pouvant causer un mauvais fonctionnement du dispositif.

This Class [B] digital apparatus meets all requirements of the Canadian Interference-Causing Equipment Regulations.

Cet appareil numérique de la classe [B] respecte toutes les exigences du Règlement sur le matériel brouilleur du Canada.

Warning! Changes or modifications not expressly approved by {Applicant name} could void the user's authority to operate the equipment. Approved antennas are listed below and antennas not included in this list are strictly prohibited for use with these devices. The required antenna impedance is 50 ohms.

Approved Antennas

Portal Gateway/WAC

- HG2402RD-RSF - 2.4GHz Rubber Duck Antenna
- MP24008XFPTNF - 2.4GHz ISM-XF Panel Antenna
- MC2400PTMSMA - 2.4GHz Omni-Directional Antenna
- BS2400XL3 - 2.4GHz Outdoor Omni-Directional Antenna

Controller

- Integrated Antenna

IMPORTANT! Any changes or modifications not expressly approved by the party responsible for compliance could void the user's authority to operate the equipment.

Contents

1	Overview	
	System Overview	7
	Setup Checklist	12
2	Hardware Installation	
	Hardware Overview	13
	Installing System Hardware	16
	Install Portal Gateways (Task 8)	24
	Install Door Hardware (Task 9)	28
3	Software Installation	
	Prepare Your Computer (Task 3)	33
	Gather and Organize Segment Data (Task 4)	43
	Install Software (Task 5)	45
4	Configuring Segments, Portal Gateways and Controllers	
	Create Your Segment (Task 6)	63
	Add and Configure Portal Gateways (Task 7)	67
	Sign on and Configure Controllers (Task 10)	84
5	Configure AMS Software (Task 11)	
	Associations	96
	Credential Settings	108

	Daylight Saving Settings	116
	I/O	116
	Misc.....	120
	PIN Settings.....	120
	Adding Users to the Segment.....	121
	Portal and Reader Control and Messaging.....	134
	Configuring Timezones	137
6	Using and Managing the System	
	Wi-Q AMS Configurator	145
	System Administrator	166
	Backing Up and Restoring Your AMS Database.....	174
	Firmware Updates	178
	Transactions Monitor.....	181
	Statistics Monitor.....	191
	Reports.....	199
7	Advanced Troubleshooting	
	Status Flags in the FLAGS Column.....	211
	Update Flags in the PEND Column	212
A	Glossary	214
B	Lock installation	220

1 Overview

This manual is your complete guide to the Stanley Wi-Q Access Management System. It provides detailed steps to install hardware and software, configure and customize your system, and use and manage the system.

The information is presented in a linear manner, describing each tab, feature and application in the system. However, tasks to install hardware and software and configure the system for the first time do not necessarily progress in a linear manner. You will find a Set Up Checklist at the end of this section and in the Getting Started Guide to take you through the initial setup and configuration tasks in a logical sequence.

If you have not yet read through the Wi-Q AMS Getting Started Guide, it is a good idea to do so before beginning any installation and setup. The Getting Started Guide presents the big picture in just a few pages and will help you identify problems and create solutions as you work your way through hardware installation and setup, software configuration, and system operation. If you are unfamiliar with the terms used in wireless technology, you may want to refer to the Glossary included in this manual as Appendix A.

System Overview

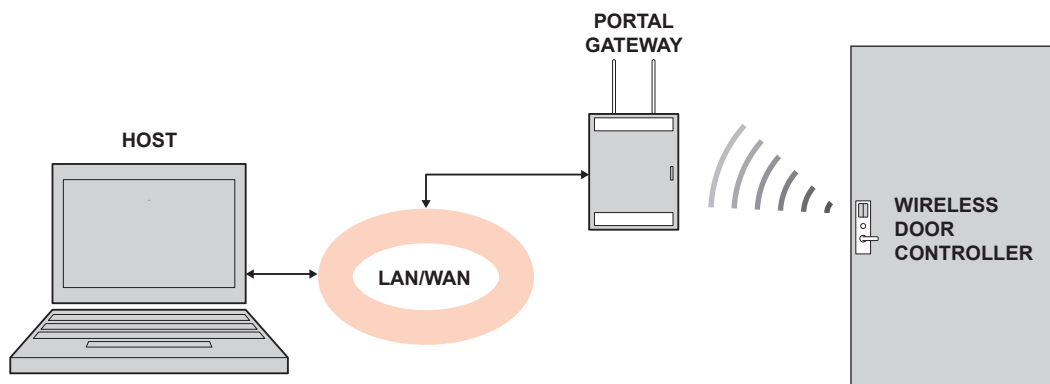
The Stanley Wi-Q Access Management System (Wi-Q AMS) integrates powerful access management software with Portal Gateways, Wireless Access

Controllers, and multiple controller formats that work together to enable all decision-making at the door. The system runs remotely with no need for hard-wiring, providing innovative access control in any environment. Wi-Q AMS is versatile so you can create a whole new system, retrofit existing hardware, and include various CCTV alarms, general alarms, and inputs/outputs.

Basic Hardware Components

A basic Wi-Q AMS system has three components: a host computer with Wi-Q AMS, a Portal Gateway, and a controller lock at the door. Figure 1 is a simple diagram showing these three components.

Figure 1 Four Basic Components



The Host Computer

The software is installed at the Host computer and set up to tell the Portal Gateways on the network which controllers to control and how to control them. It contains all User ID and access management commands. The Host transfers information to and from the Portal Gateway through a standard Ethernet (LAN/WAN) connection.

The Portal Gateway

The Portal Gateway is a device connected to the Host computer through a secure IP address, similar to the way your computer is connected to the internet. It transfers data signals from Wireless Controllers to and from the Host computer. The Portal Gateway recognizes all Wireless Controllers within its antenna range. One Portal Gateway can control as many as 64 controllers in a system.

Wireless Controllers

There are two types of Wi-Q and Omnilock Wireless Controllers:

Wi-Q

- Wireless Access Controller
- Wireless Door Controller

Omnilock

- Single Door Controller
- Omnilock Reader

Both controllers are equipped with Wi-Q or Omnilock Technology that controls user access at the door. The basic configuration is battery operated, with either keypad or card reading capability and an internal antenna that communicates with the Portal Gateway. The Wireless Controller grants user requests according to how they are configured in the AMS software.

Basic Operation

The system works very simply. A user enters a pass code at a controller, either using an access card or by entering a code on a keypad. If the controller recognizes the credential from the configured settings downloaded from the Host via the Portal Gateway to the controller, the door opens. The controller also sends regular signals (beacons) to the Portal to let it know that it's working properly. If a controller goes offline, the Host receives a message from the Portal Gateway.

Additional System Configurations

Wi-Q AMS supports various system configurations. For example, some locations at your segment may already be hard-wired with legacy equipment or additional input or output devices. You can also use a Wireless Access Controller, hard-wired to a controller and strike, and wirelessly communicate back to a Portal Gateway.

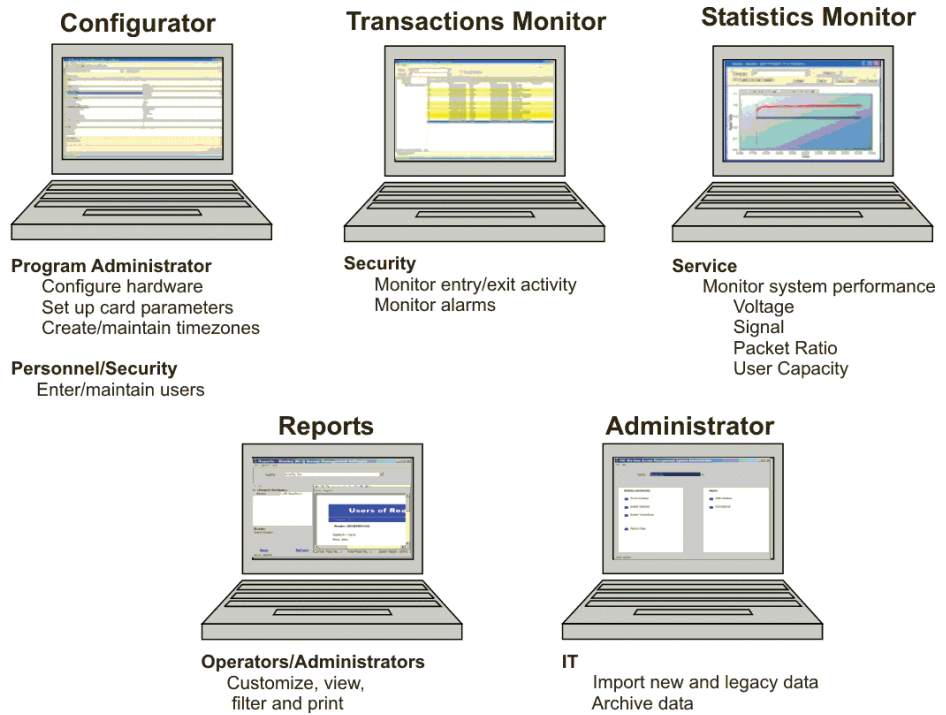
For more information about various applications you can adapt for use with Wi-Q AMS, see “Hardware Overview” on page 13.

Software Overview

Wi-Q AMS provides powerful tools to manage your system: Wi-Q AMS Configurator, Transactions, and Statistics Monitor help you configure your settings, monitor transactions in the system, and verify system hardware performance. You can view and create reports from all applications and perform archivals and imports using Wi-Q AMS Administrator.

If you are the Program Administrator responsible for setting up communications between AMS software and system Portals and controllers; you will spend most of your time using the Configurator module. If you are in personnel or security, you may be the person who adds users to the system and gives them access privileges and IDs. You will spend most of your time on the Users tab of the Configurator. If you are responsible to oversee security for your organization, you will monitor all access and alarm activity using the Transactions module. If you are a Systems Administrator responsible to ensure the wireless network is operating at maximum performance, you will use the Statistics Monitor and Administrator modules. If your organization is small, you may use all applications. Regardless of the tasks you are responsible to perform, you can view and print reports from all applications using the Reports module.

Figure 2 Five Applications



Once the software is installed, you will find the Configurator module shortcut on your desktop. You can access all applications from the Configurator main menu. You can also access these applications from the Windows Start Menu under Stanley Security Solutions.

Setup Checklist

Wi-Q AMS is set up in eleven basic tasks. Completing these tasks will ensure you get your system up and running as quickly and efficiently as possible.

Some tasks are performed at the Host computer and some at the segment site. It is appropriate to perform some tasks concurrently, for example, you may have someone prepare your computer and install the software concurrently with site plan development and hardware installation. However, you must have the software installed and Portal Gateways 'online' before you can sign on controllers.

Note System setup does not proceed in a linear manner. The following references prompt you to skip around within this User Guide.

- ☐ Task 1: Develop a Site Plan, page 17.
- ☐ Task 2: Position Portal Gateways, page 21.
- ☐ Task 3: Prepare your Computer, page 33.
- ☐ Task 4: Gather and Organize Segment Data, page 43.
- ☐ Task 5: Install Software, page 45.
- ☐ Task 6: Create your Segment, page 63.
- ☐ Task 7: Add and Configure Portal Gateways, page 67.
- ☐ Task 8: Install Portal Gateways, page 24.
- ☐ Task 9: Install Door Hardware, page 28.
- ☐ Task 10: Sign On and Configure Controllers, page 84.
- ☐ Task 11: Configure AMS Software, page 96.

2 Hardware Installation

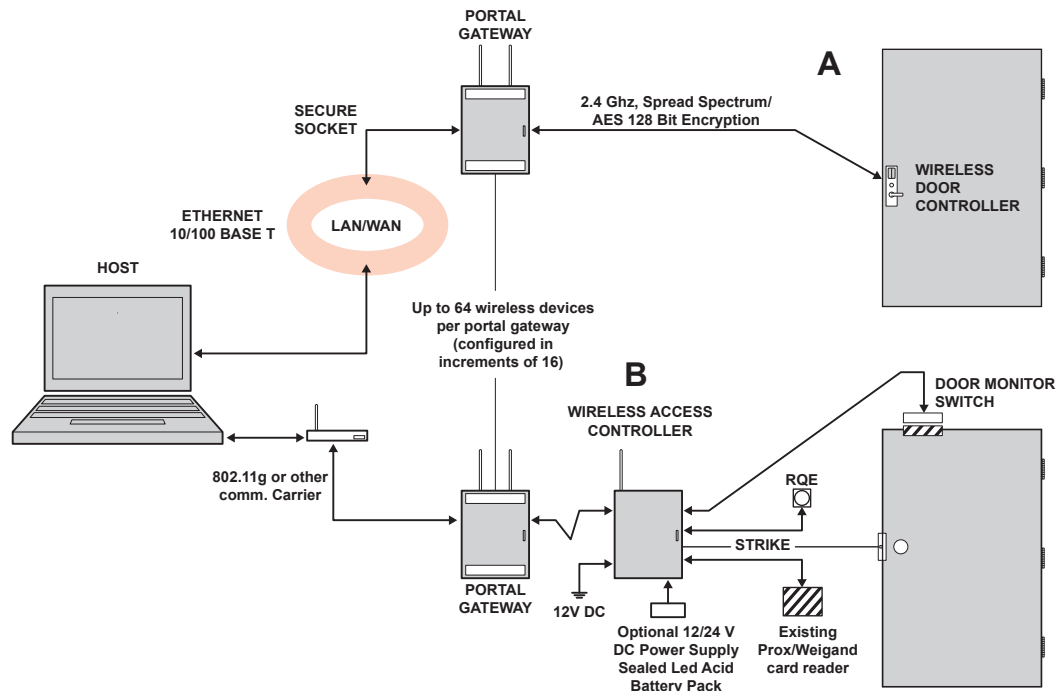
Hardware Overview

Wi-Q AMS runs remotely with no need for hard-wiring, creating a simple, innovative approach to access control in any environment.

Note Once Wireless Controllers are installed, you will need to sign them on to AMS software. Therefore, it is appropriate to install the software before or concurrent with hardware installation. For more information, see “Sign on and Configure Controllers (Task 10)” on page 84.

Figure 3 is a block diagram showing various configurations. Wi-Q AMS supports all Wireless Controllers via Portal Gateways (A); and existing Prox/Wiegand, RQE, door strike, and door monitor switch configurations (B). Configuration types are briefly described in the following paragraphs. Full installation instructions are provided in the following sections.

Figure 3 Example System Configurations



Portal Gateways

The Stanley Portal Gateway is a wireless device connected to the Host computer through a secure IP address, similar to the way your computer is connected to the internet. It transfers data signals from Wireless Controllers to and from the Host computer. The Portal Gateway recognizes all Wireless Controllers within its antenna range. One Portal Gateway can be upgraded to control up to 64 Wireless Controllers.

Portal Gateways provide bi-directional radio frequency communication between Wireless Controllers and the associated host computer(s). All communications are via secure AES 128-Bit encrypted 2.4 HGz using spread spectrum RF Radio technology. The Portal Gateway communicates to the host computer through web services via either Ethernet 10/100 BaseT, approved 802.11 G wireless, or an approved commercial RF carrier-enabling a wireless solution end-to-end. All communications between Wireless Controllers and Portal Gateways can be further backed up by "redundant" Portal Gateways each with capacity for up to 64 Wireless Controllers.

Transmit range from Portal Gateway to controller varies based on building construction. Various factors can affect the range you will see in your facility.

Wireless Controllers

Wi-Q AMS software is designed to operate with Wi-Q Technology Best 45HQ mortise and Best 9KQ Cylindrical locksets equipped with either keypad, card, or a combination of controller input devices. Wi-Q AMS software is also designed to work with Omnilock 9KOM cylindrical and 45KOM mortise locksets. Door switch monitor, request to exit, and door lock position sensors are included in the locks. Wi-Q and Omnilock Controllers support a broad range of Controller technologies:

- Card or Keypad ID with PINs
- Magnetic Stripe, Prox, MIFARE (card number only)
- 512 Timezones (per Segment)
- 18000 User Credentials per door (based on licensing)
- Cardholder access level definition
- Dynamic memory for IDs vs Transactions
- Locally stored and transmitted transactions
- ADA Compliant
- No AC required at door

Wireless Access Controllers

You can retrofit any existing controller configuration to communicate with Portal Gateways using Wireless Access Controllers. You can also use this device to connect other I/O devices to the system. About the size of a standard double-gang box electrical box, these controllers operate on standard 12V DC or an optional 12/24 V DC power supply, sealed, lead acid battery pack. They seamlessly integrate existing door hardware into the Wi-Q AMS system, supporting Wiegand-compatible keypad Controller inputs. Check with your Stanley Representative for a list of compatible controllers.

Antenna Types and Applications

To optimize system performance, it is important to position Portal Gateways to receive maximum signal strength from the controllers. Once all door hardware has been installed, you will be ready to position Portal Gateways using the Wi-Q Technology Site Survey Tool. Wi-Q and Omnilock Technology support two antenna types: Omni-directional, designed to provide coverage in all directions; and Directional antennas that focus the signal from point-to-point over longer distances and through obstacles. For more information, see Position Portal Gateways (Task 2).

Installing System Hardware

Wi-Q AMS is designed to operate with Stanley Wi-Q and Omnilock Controllers and Portal Gateways. Detailed installation instructions are provided in the following sections and in the lock instructions provided with the hardware which are included as Appendices to this manual.

What you will need

- ☐ Engineering drawings or segment map
- ☐ Wi-Q Technology Site Survey Kit
- ☐ Wi-Spy Spectrum Analysis Tool by MetaGeek (or equivalent) to identify the best open channels for your network
- ☐ For Keypad Controllers, you will need the sign-on credential from the Wi-Q AMS software
- ☐ For magnetic stripe or proximity card controllers, you will need the Programmer ID cards supplied in the software package. You will also need the appropriate magnetic stripe or proximity USB enrollment controller to create a proximity sign-on credential.
- ☐ Locksets to be installed on doors, including cores and keys supplied with specific model.
- ☐ Installation instructions for specific lockset brand and model.
- ☐ Portal Gateways
- ☐ Access to standby power for 120 VAC non-switch circuit for 12 VDC plug-in transformer.
- ☐ 10/100/1 GigE Base-T network connection

- ☐ Crossover Ethernet cable if direct connection between Portal Gateway and Host will be used
- ☐ Wireless Access Controllers, if used, and knowledge of existing hardware and switches for any retrofit installations
- ☐ Installation tools
- ☐ Drill Motor/hole saw with bits appropriate for the specific lock (see the template included in your lock)
- ☐ Phillips-head and flat-head screw drivers
- ☐ Access to the Host, a networked workstation, or wireless laptop computer.

Develop a Site Plan (Task 1)

Before installing Portal Gateways, it is a good idea to develop a general plan for the segment. This plan will guide you in deciding where to install the Portal Gateways. You must consider the following:

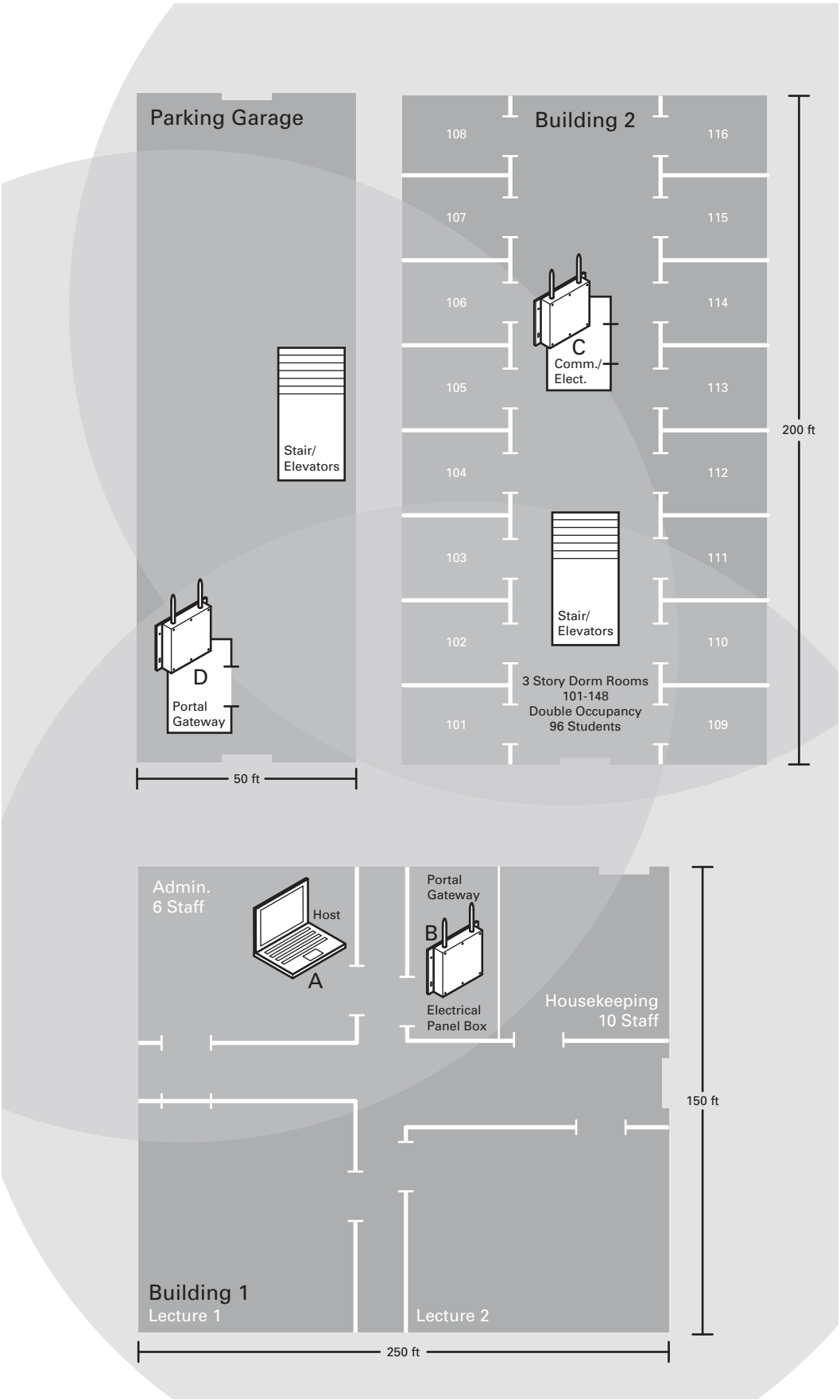
Transmit range from Portal Gateway to controller varies based on building construction. Site characteristics such as reinforced concrete walls could interfere or weaken the signal; open spaces and low interference can increase signal strength.

Controllers will transmit to the nearest Portal Gateway; however, if for some unforeseen event, the nearest Portal Gateway goes down; the controllers are able to report to another Portal Gateway in the nearby area, providing redundancy in the system.

Figure 4 shows a typical site configuration. The Host (A) is located in Building 1. The Building 1 Portal Gateway (B) is located near the electrical panel in the communications/electronics room. This Portal Gateway will collect transactions from the 12 controllers in Building 1. As you can see by the gray circle representing the Portal's range, it also extends to the entrance of Building 2 and the Parking Garage. This provides redundant coverage of those areas should either of the other Portals go off line.

The Building 2 Portal Gateway (C) is positioned next to the electrical panel. With 48 rooms in this three-story dorm, front and rear access doors and access to the elevator on three floors, this gateway provides coverage to 53 controllers. Its range extends to all three floors of the building, and will also cover the pedestrian access, and elevator of the Parking Garage. The Parking Garage Portal (D) is positioned to cover the pedestrian door near the dorm and the stairway and elevator doors. Its range also extends to the entrance of Buildings 1 and 2.

Figure 4 Sample site installation plan



Plotting the Plan

If you don't already have a site plan indicating building dimensions, distances between buildings, possible obstructions, parking segment, and other gated access points, contact your facilities maintenance or project engineer. If none are available, you will need to visit the site, take measurements and draw up a plan of your own.

Device Identification

Each device in the system will have its own unique identity. It will be important for you to document that identity, along with capacities and locations, and to give each device a common name such as "Parking Garage" or "Admin 1". At a minimum, you must record the Media Access Control number (MAC address) for each device. This 12-digit number is assigned by the manufacturer of a network device so that it can be recognized as a unique member of a network.

Note The MAC address is most commonly shown on the back of or inside the device, so it's important to record this number before you install the device.

When you move on to configure the Host computer, it is essential to have a list identifying each controller lock and Portal Gateway recognized by the system. We recommend creating a temporary label for each device that includes the MAC address, device name, location, capacity, and type of antenna so that installers on the site will have a reference for installing the correct device in a location.

Redundancy

In our sample plan, approximate Portal Gateway ranges are indicated by shaded circles. As you can see, these circles overlap, creating a degree of redundancy in the system. It is perfectly acceptable, in fact, desirable to create range redundancy in your plan. This will provide additional coverage should a Portal Gateway go off line, intentionally or otherwise. If the controllers find that the nearest Portal Gateway is down, they will "search" for the nearest Portal Gateway.

Interference

Wi-Q and Omnilock Technology transfers information between devices in the form of data packets over the 2.4 GHz ISM band. This band frequency is very heavily used in many devices such as wireless computer networks (802.11 b and g) and cordless phones, which increases the risk of lost packets, that is, packets that do not make it from a controller to a Portal Gateway because of interference. Interference can also reduce controller battery life due to the constant re-broadcasting of packets and lost connections to the Portals.

To achieve maximum efficiency in AMS, this frequency range must be managed effectively. Therefore, the installer must know the positions and channels of all the 2.4 GHz wireless devices in the segment and ensure channels are assigned to each device so that there is minimum frequency overlap with adjacent or nearby devices.

Extended Range

It is likely that you will have locations in your segment separated by distances greater than 300 feet. You may want to consider adding a Portal Gateway with a directional antenna to increase the transmit range.

Note Actual distances will vary based on building construction.

Position Portal Gateways (Task 2)

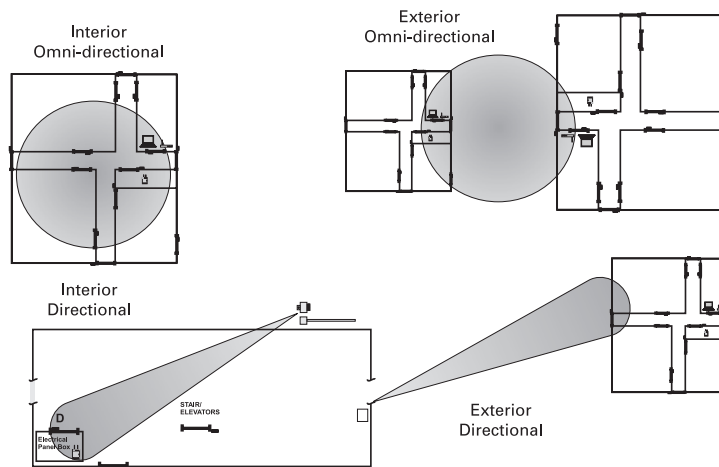
Once all door hardware and controllers have been installed, you are ready to determine the final placement of Portal Gateways using the results from the Wi-Q Technology Site Survey Kit. The Site Survey Kit helps you determine the number and optimum location of Portal Gateways and verify signal strength before permanently installing the hardware. It is important to perform the Site Survey process as many times as needed to determine the optimal position.

Note You will need to test signal strength at all door locations near the perimeter of the coverage area as well as any location where a physical obstruction may cause interference.

Antenna types

Wi-Q and Omnilock Technology provide two antenna types: Omni-directional, designed to provide coverage in all directions; and Directional antennas that focus the signal from point-to-point over longer distances and through obstacles. If you have trouble verifying signals, you may need to consider some antenna type options. Figure 5 shows two available antenna types.

Figure 5 Selecting the antenna type that best suits your needs.



Power Supply

Portal Gateways must be located where they can receive 12 VDC power from a transformer plugged into a dedicated power source. If this is not possible, ensure they are plugged in to a 24/7 power circuit that cannot be turned off at a switch, such as a light switch that might be turned off by a cleaning crew.

To make your final determination, you must also consider the following:

- Access to Ethernet 10/100 Base T network connection.
- Proximity to other I/O device(s) if used.
- Placement within range of controllers.

Note Actual distances will vary based on building construction.

Troubleshooting

If you have problems establishing communication using the Wi-Q Technology Site Survey Tool, refer to the following troubleshooting guide:

If...	Then
The green light on the power supply does not turn on...	Firmly press the power cord into the outlet on the outside of the case. Confirm that the other end of the power cord is plugged into a working electrical outlet.
The power supply is on, but the green light on the Portal Gateway does not turn on.	Ensure the power cord is firmly connected to the bottom of the Portal Gateway.
The Stanley Site Survey application freezes after clicking Connect.	Close the application and reconnect the Host PC to the Stanley survey wireless network.
The Stanley Survey network is not listed in the Wireless Network Connection window.	Confirm that the green light on the power supply is on. Ensure the power cord is firmly connected to the bottom of the wireless router (under the foam).
The Stanley Site Survey application is not receiving a signal from a beacon.	Ensure the beacon is powered up. Move the beacon closer to the Stanley Site Survey kit.
When connecting the battery wires, the beacon does not power up (the blue LED on the circuit board remains off and no confirmation tone sounds).	Disconnect the battery pack wires, wait 10 seconds, and reconnect. If this does not work, replace the battery pack.
The Stanley Site Survey application is not receiving signals from any beacons.	Ensure the Ethernet cord is connected to the wireless router (under the foam). If this does not work, you might need to change the advanced setup options for the application with the assistance of your Stanley Security Solutions representative.

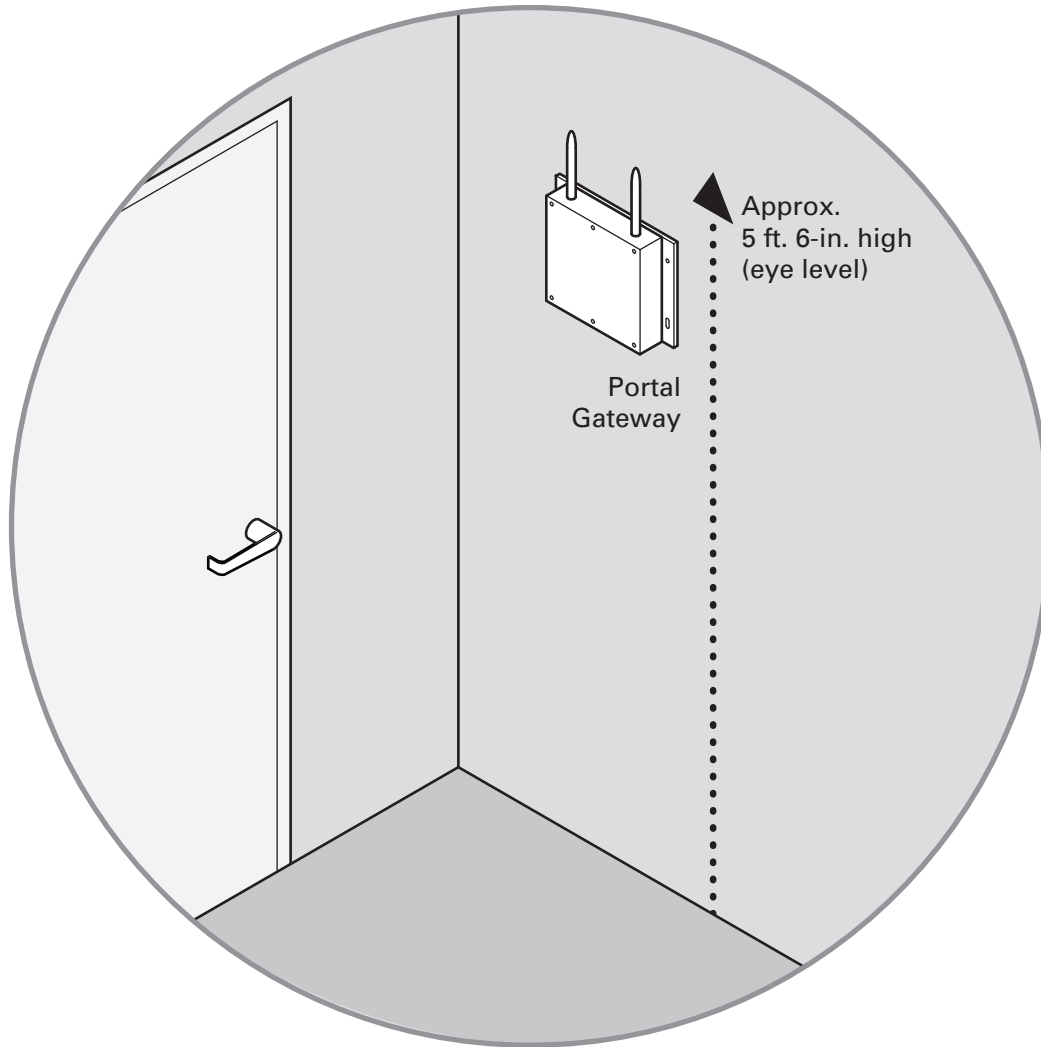
Next steps

When you are satisfied with signal performance, you can proceed to configure Portal Gateways using Wi-Q AMS.

Install Portal Gateways (Task 8)

The most common installation site is inside an existing protected area such as a locked room or other secure enclosure, or above ceiling level. If you are installing inside a dealer-supplied locked enclosure, refer to the instructions provided with that equipment. Figure 6 shows a Portal Gateway positioned in a protected area.

Figure 6 Installing a Portal Gateway in a protected area.



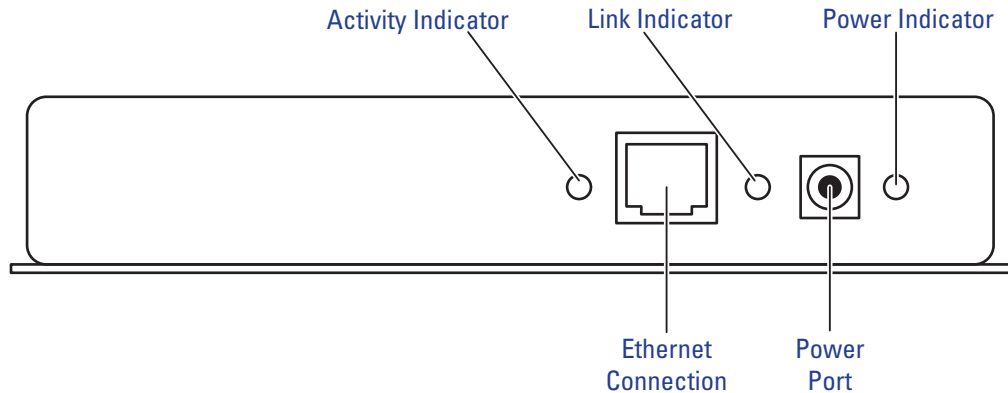
Connecting the Portal Gateway and Verifying Operation

Once the Portal Gateway is installed, connect and verify operation:

- 1 Connect the power supply to the Portal Gateway and plug the transformer into a dedicated AC power supply (wall outlet). The Power Indicator light should come on. See Figure 7.

- 2 Insert the Ethernet cable into the Ethernet connection on the bottom of the Portal Gateway. The Link Indicator light should come on. After about 30 seconds, the yellow activity indicator light will flash under normal operation.

Figure 7 Connecting the Portal Gateway to Power and Ethernet Connections.



Note If no protected area is available, consider positioning the Portal Gateway inside a locked enclosure designed for that purpose. Contact your dealer for more information.

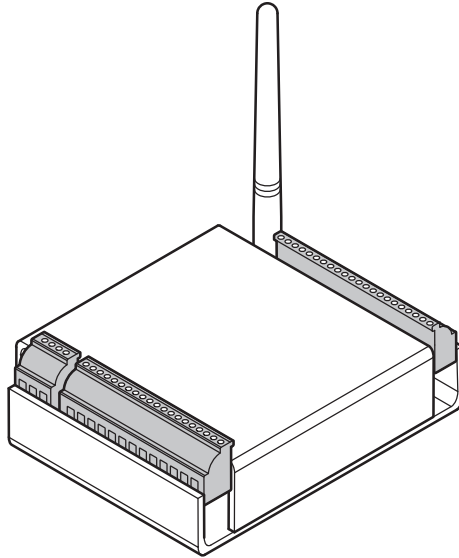
Installing a Wireless Access Controller

The Wi-Q Technology Wireless Access Controller (WAC) provides an optional, cost effective way to retrofit an existing hard-wired application, or where the installed controller may be obsolete or unable to handle additional controller inputs. It supports Wiegand-compatible keypad Controllers and is configured and monitored in Wi-Q AMS the same as a standard controller.

Note Please check with your Stanley representative for a list of compatible controllers.

Using the Wireless Access Controller (Figure 8), you can add controllers or other I/O devices to an overall wireless solution without the high cost of installing hard-wire such as RS485 or CAT5 to the controller. You can position the controller at the door or where suitable above the ceiling tile.

Figure 8 Wireless Access Controller.



Installation

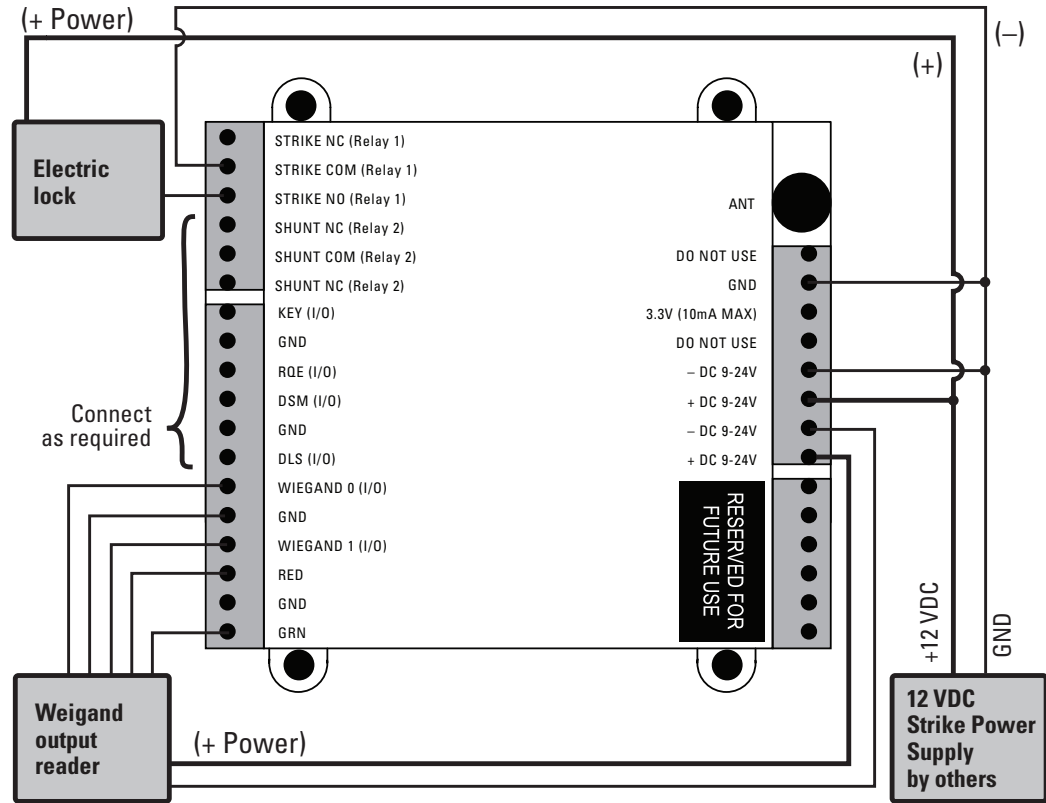
Specific installation methods are dependent on the device type and configuration of the system; therefore, the WAC should be installed by a trained technician using the instructions provided with the controller.

WARNING: Wireless Access Controllers are intended for use in indoor or protected area. For other applications, such as outdoor use, contact the factory for the appropriate NEMA enclosure. Changes or modifications not expressly approved by Stanley Security Solutions could void the user's authority to operate the equipment.

Wireless Access Control Wiring

The Wireless Access Controller (WAC) can be installed with its own 12 VDC power supply or slaved to the existing installation. Figure 9 is a wiring diagram illustrating both configurations.

Figure 9 Connecting devices to a WAC



Once the WAC is installed and all points connected, it will be recognized by Wi-Q AMS as a 'Controller' in the system. For more information about configuring the WAC in the software, see "I/O" on page 116.

Install Door Hardware (Task 9)

This section provides general instructions for installing your controllers. Complete instructions for installing locks are packaged with the hardware. You will also find instructions for Stanley Wi-Q Technology Best 45HQ mortise locks, Best 9KQ Cylindrical Locks, Best EXQ Trim, Omnilock 45KOM mortise locks, and Omnilock 9KOM cylindrical locks as Appendices to this manual.

Before You Begin

Before you begin, take a few moments to review the following considerations:

- Record device MAC address before installing device. You will need this when configuring the controller in the software.
- Wi-Q and Omnilock Technology locks will work from -31°F to 151°F.

Note Extreme heat will cause a reduction in wireless signal strength and can cause a loss of connectivity while the heat remains.

Note Alkaline batteries cease to operate if they reach a temperature of -20°F.

- Wi-Q and Omnilock Controllers are designed for use on 1-3/4-inch doors. If you need to install on non-standard doors, contact Stanley Customer Service for more information.
- Lockset instructions are given for right-hand doors (as determined from outside the door). If you are installing a left-hand door, see the instructions provided with your lockset for hand change instructions.
- If you are installing locksets on unprepared (un-drilled) doors, use the template provided with your specific lockset.

Please refer to the Appendices or the instructions provided with your particular lock to complete these steps. Once this is done, check controller operation as described in the following paragraphs.

Check Controller Operation

Verify controller operation using the steps appropriate for your controller type (Magnetic Card or keypad). If the system does not operate properly, see Troubleshooting, at the end of the section.

Magnetic Card Check

If your system has a magnetic card controller (mag card), default Programmer ID cards are supplied with the software. You will need these cards when you are ready to sign on the controllers.

To perform a magnetic stripe card verification:

- 1 Determine if the magnetic card type is Track 2 or Track 3.
- 2 Select the default Programmer ID card that matches the type for your magnetic card controller.
- 3 Insert and remove the magnetic card. The magnetic stripe on the card should be aligned with the 'V' mark by the card slot. The lights on the top of the Controller will flash green once and unlock, then during the open delay time, it will flash green five times. Once this occurs, the card controller light will flash red and lock.
- 4 While unlocked, check for proper lock operation.

Keypad Check

If your Controller is a keypad type, perform the following steps:

- 1 At the keypad, enter the default Programmer ID, 1234#. The green light on top of the card controller will flash once and the lock will unlock, then during the open delay time, it will flash green five times. Once this occurs, the controller red light will flash and the lock will relock.
- 2 While unlocked, check for proper lock operation.

Troubleshooting mortise and cylindrical locks

If the mechanism doesn't unlock, refer to the following table:

LEDs	Sounder	You should...
Single red flash	—	Use the card at a moderate speed.
Red flashes	3 short tones	Use the temporary operator card provided with the lock.
Green flashes	—	Check the motor connection.
—	—	Check the battery connection.

Troubleshooting EXQ Exit Hardware trim

If the mechanism doesn't unlock, refer to the following table:

LEDs	Sounder	You should...
Single red flash	—	Use the card at a moderate speed.
Red flashes	3 short tones	Use the temporary operator card provided with the lock or Perform a door reset to restore to the factory default settings (the lock may already be associated (programmed)).
Green flashes	—	Check the motor connection.
Alternating red and green flashes	—	Check the motor connection.
—	—	Check the battery connection.

For additional troubleshooting instructions, see the Service Manual for the hardware.

Once you have installed and tested your Controllers, you are ready to sign them on in your system. To do this, Wi-Q AMS software must be installed on your Host computer. At a minimum, you will need to create your Segment and add your Portal Gateways to the Segment Tree before you can sign on the Controllers. See "Add and Configure Portal Gateways (Task 7)" on page 67. Once that is done you can return to the site and sign on the controllers. See "Sign on and Configure Controllers (Task 10)" on page 84.

Verify Signal Strength, Voltage and Packet Radio

If you used the Wi-Q Technology Site Survey Kit, you have already verified basic controller signal strength. Once the controllers are signed on, you can use the Statistics Monitor application to further measure controller performance, including controller voltage (battery level), and the packet ratio (the number of packets received vs the number of packets sent) of the controller. For more information about the Statistics Monitor application, see “Statistics Monitor” on page 191.

3 Software Installation

Stanley Wi-Q AMS provides powerful suites of tools to manage your system: Configurator, Transactions and Statistics Monitor. View reports from all applications using Reports, and perform archivals and imports using Administrator.

Once the software is installed, you will find the Configurator shortcut on your desktop. You can access all applications from the Configurator main menu. You can also access these applications from the Windows Start Menu.

The following setup tasks are covered in this section:

Task 3 — Prepare your Computer

Task 4 — Gather and Organize Segment Data

Task 5 — Install Wi-Q AMS Software

Prepare Your Computer (Task 3)

To prepare your computer for the installation of the Wi-Q AMS software, you must ensure that your system is equipped with an appropriate operating system, data-base and server and configure your Windows Firewall Ports.

Recommended System Limits

It is important to ensure your Host computer or computers are adequate to handle the system. The following table lists the recommended system limits for running Wi-Q AMS.

Hardware configuration	Parameter			
	Config 1	Config 2*	Config 3*	Config 4*
CPU Speed	1 cores @ 3GHz	2 cores @ 3GHz	4 cores @ 3GHz	8 cores @ 3GHz x 2 machines (SQL server & communication server)
RAM	1 GB	4 GB	4 GB	8 GB
Hard Disk	40 GB	40 GB	40 GB	100 GB
OS	Windows XP, Windows 7 Professional, or Windows 7 Ultimate	Windows 7 Ultimate 64 bit	Server 2003 32 bit, Server 2008 32 bit, or Server 2008 64 bit	Server 2008 x64
SQL Version	2005 Express or newer	2008 Standard	2008 Standard	2008 Standard
Portal Gateways	50	100	250	1000
Devices	300	1000	3000	10000
Users	1000	5000	10000	50000
Segments	1	1	1	1
Ethernet	1000 Base T	1000 Base T	1000 Base T	1000 Base T

* — requires tuning of system parameters during installation by Stanley Security Solutions Technical Support

Configure Windows Firewall Ports

Several ports must be enabled in your Windows firewall settings to allow proper communication with AMS. The following ports must be enabled:

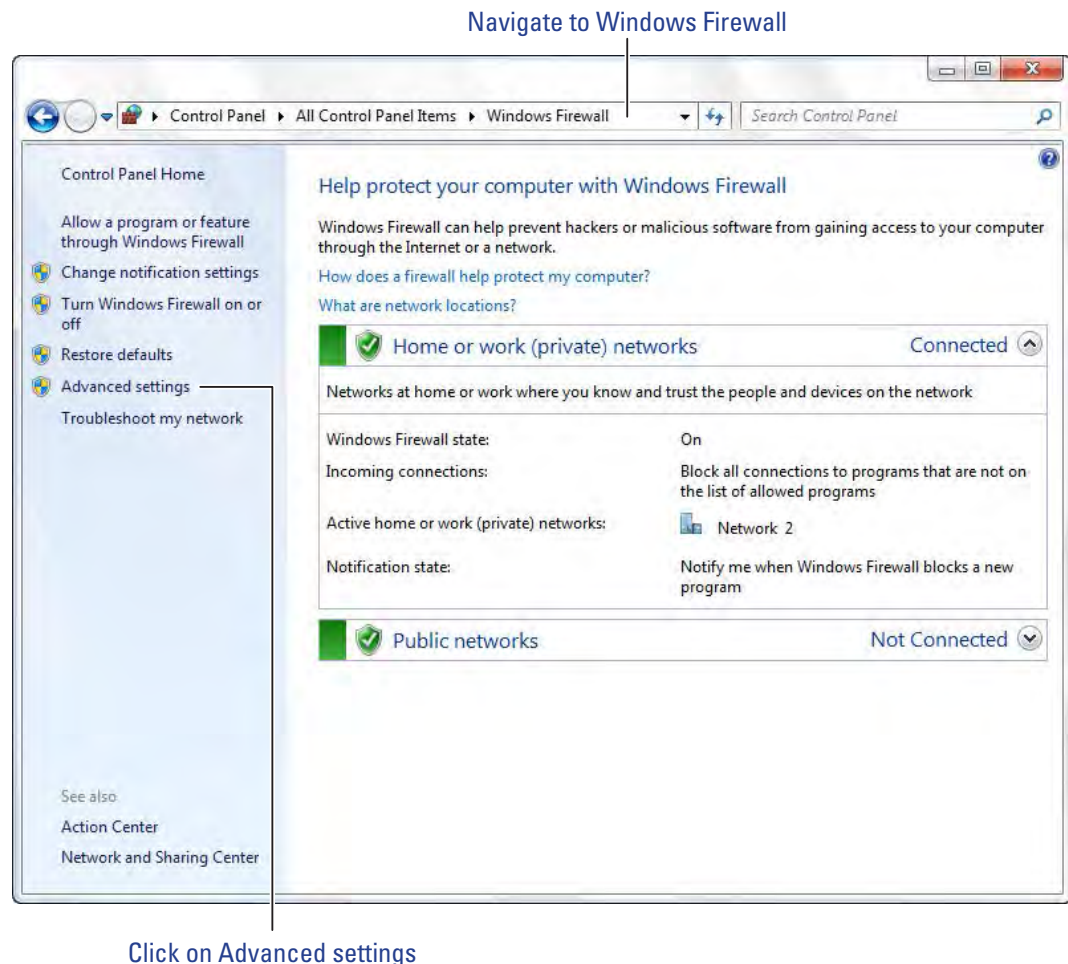
- Port 23
- Port 80
- Port 1433
- Port 1434
- Port 8000
- Port 11000
- Port 5353

If your firewall is disabled, then all ports are open by default. If the firewall is on, perform the following steps in order to add the required ports listed above:

Note The screenshots below reflect a Windows 2007 operating system. Navigating through the firewall settings in other editions of Windows will be slightly different.

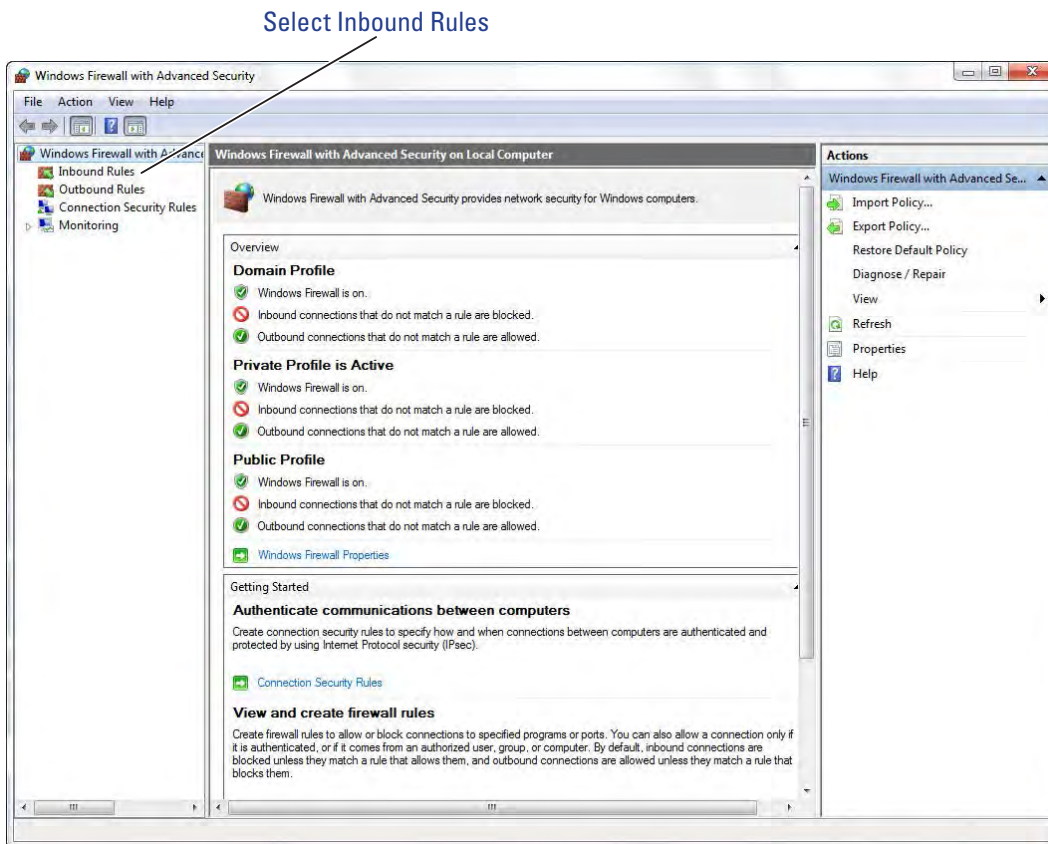
- 1 Navigate to your Windows Firewall settings from your PC's control panel. See Figure 10. Then, click on Advanced settings.

Figure 10 Windows Firewall



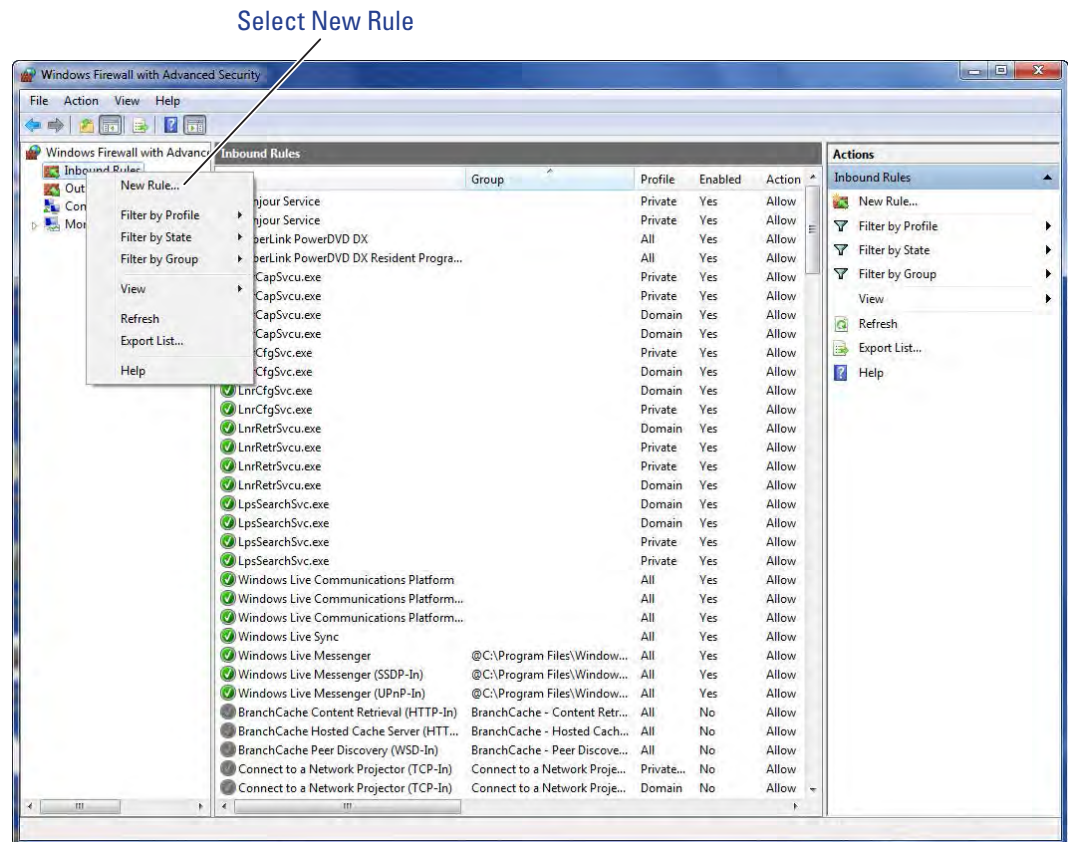
2 Select Inbound Rules.

Figure 11 Inbound Rules



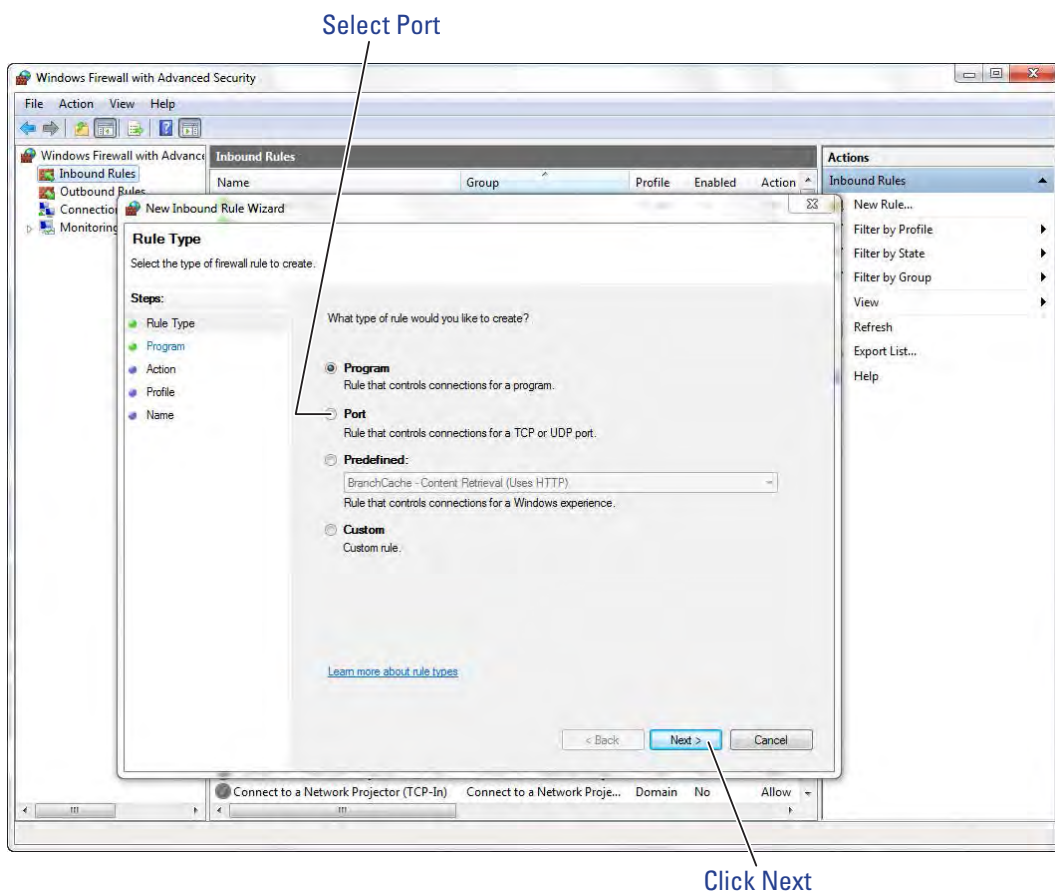
- 3 Right click on Inbound Rules to open an option menu. Select New Rule from the menu.

Figure 12 New Rule



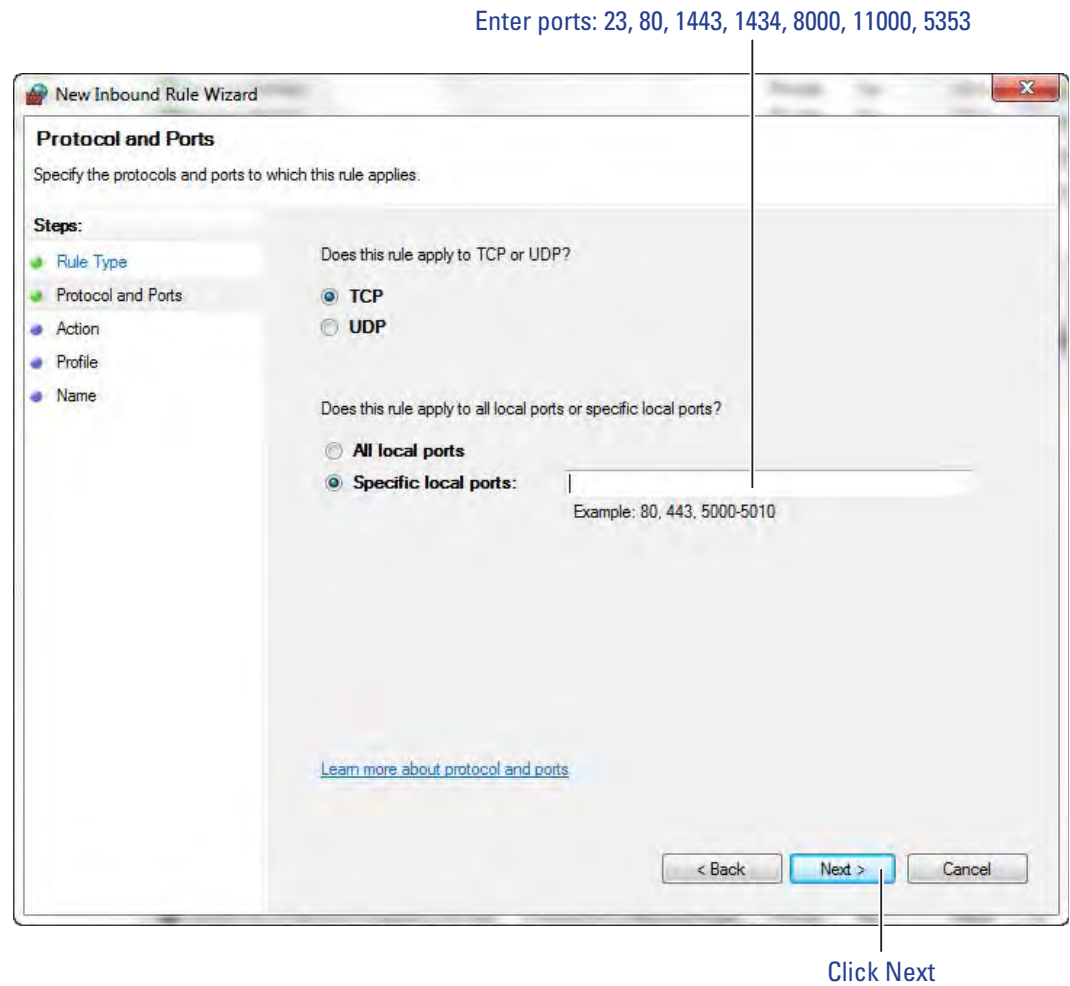
4 In the New Inbound Rule Wizard window, select Port. Click Next to continue.

Figure 13 Create Port Rule



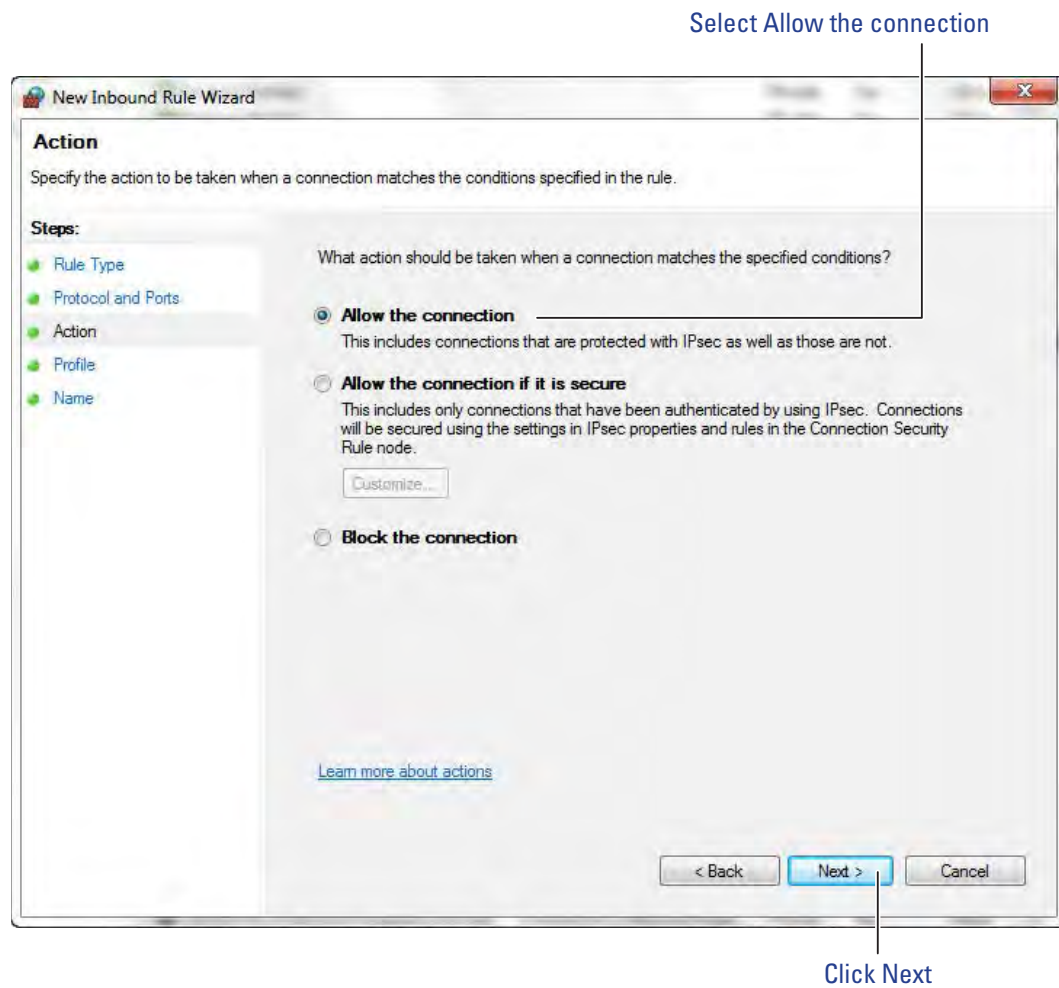
- 5 Enter the following ports into the “Specific local ports” field: 23, 80, 1443, 1434, 8000, 11000, 5353. Then, click Next to continue.

Figure 14 Enter Ports



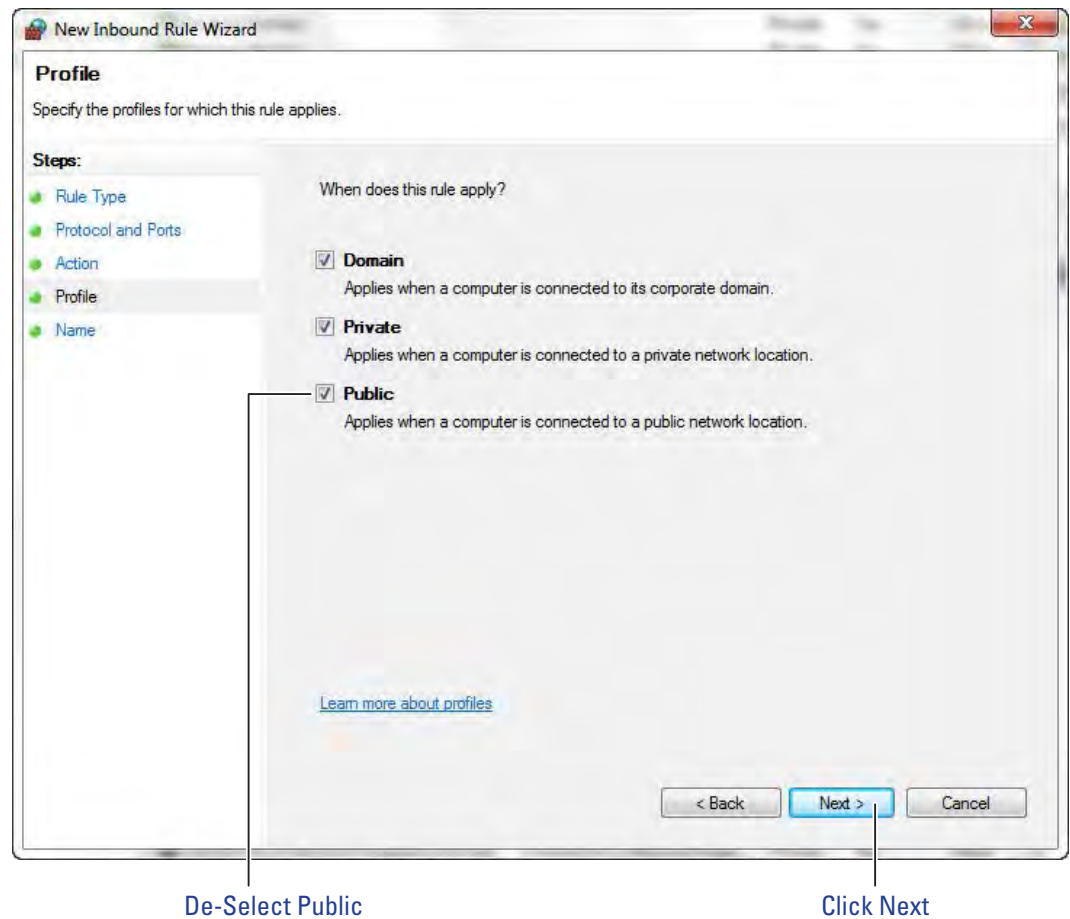
6 Select Allow the connection. Click Next to continue. See Figure 15.

Figure 15 Allow the Connection



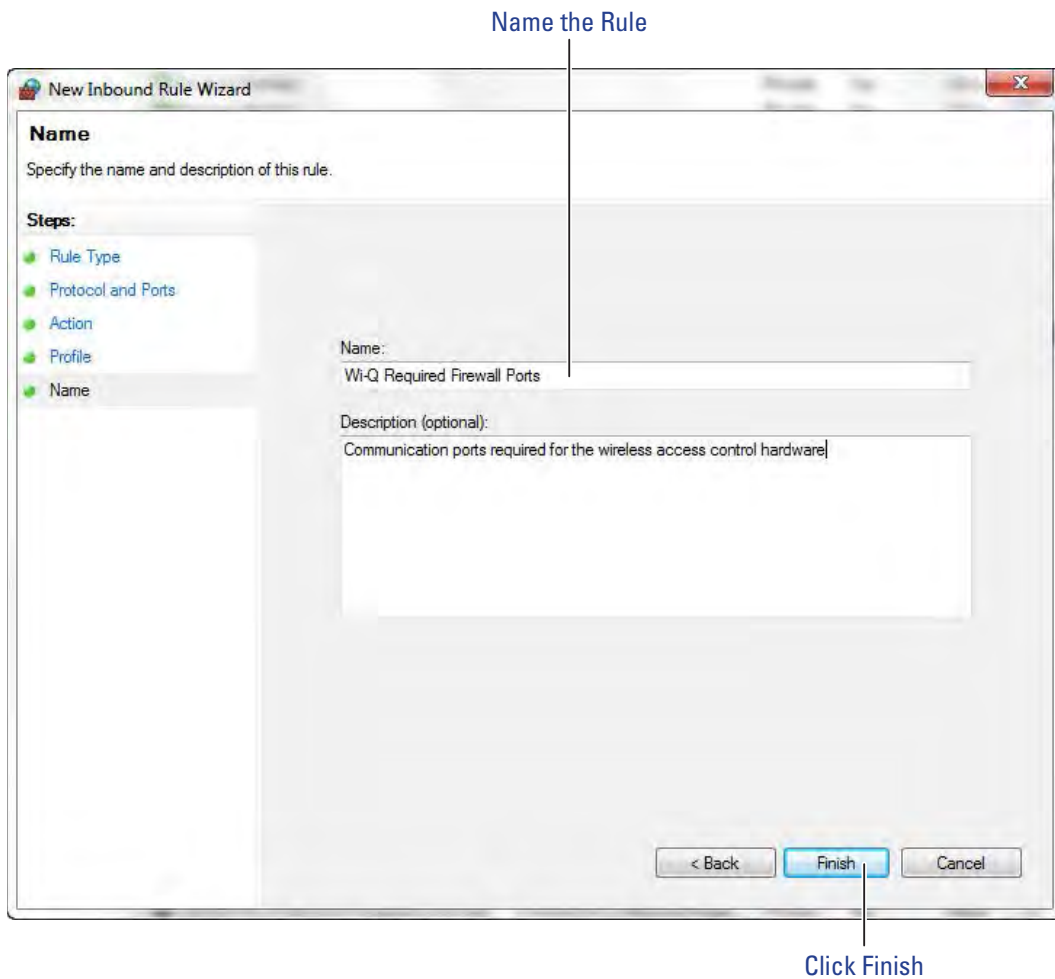
7 De-select the Public option. Click Next.

Figure 16 De-select Public



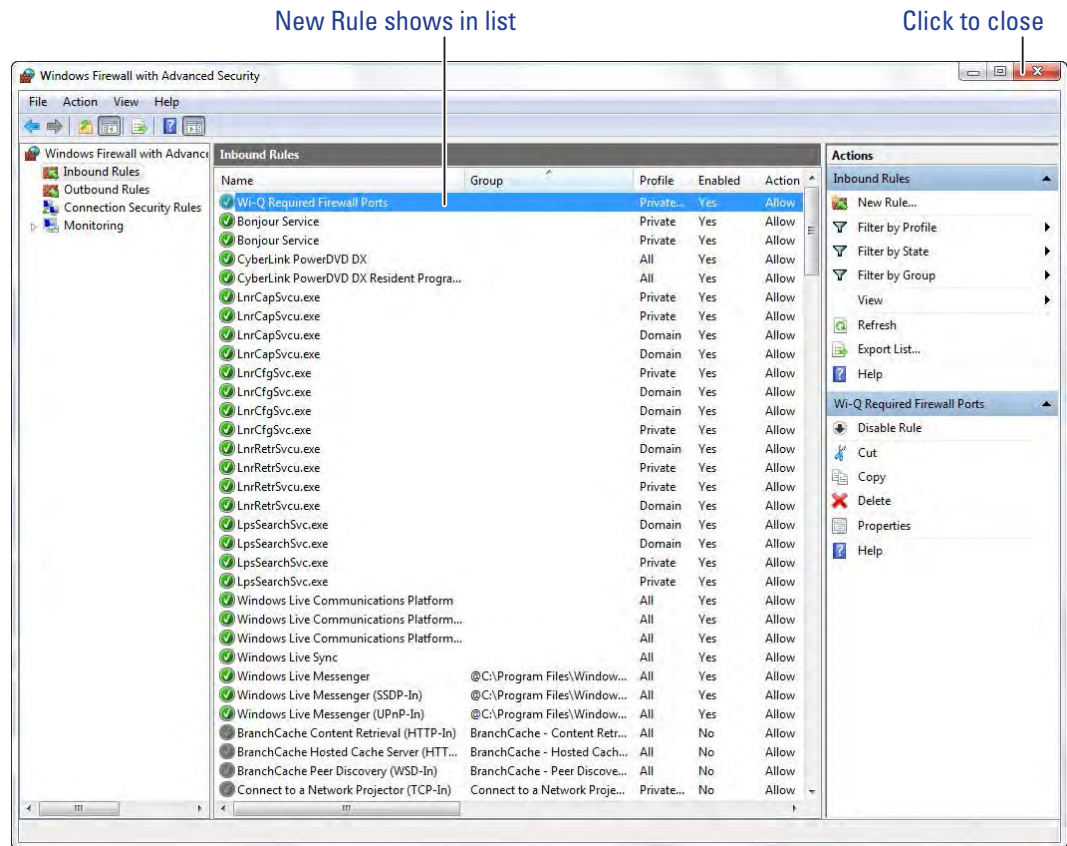
- 8 Give the new rule a name that can be easily identified by an administrator.
Once finished, click Finish. See Figure 17.

Figure 17 Name the Rule



- 9 The new rule now appears in the list. The Firewall Settings module may now be closed. See Figure 18.

Figure 18 Inbound Rules List



Gather and Organize Segment Data (Task 4)

As the technical team works on planning and installing hardware using the Site Plan, a program administrator or other person responsible for the software side of program setup should be making plans to populate and configure Wi-Q AMS.

Device Information

You will need the MAC numbers, device names, capacities, and physical locations of all Portal Gateways so that you can easily identify them and assign them to the correct location within the AMS Segment Tree. Ensure your site technical team will provide you this information as they work their way through the site.

User Information

You will also need to gather the names of users, define their access requirements, organize user and timezone groups, and decide how you will use other features configurable within AMS.

It will be helpful to create a table listing what you know about each user. Starting with a list of names, think about building a table that defines basic information about each user; such as, User Type, User Group, Shift, and so on. Following is a very simple example:

Last	First	User Type	Bldg.	User Group	Timezone	Shunt
Alvarez	Alicia	Manager	A	Admin	Default	Default
Bennet	Fred	General	A	Lecture	Default	30 sec.
Ford	Aldo	General	B	Service	Service 1	30 sec.

What User Groups will help you manage security? Do you have shift workers who are allowed on site only during certain days or hours? Will there be areas off limits to certain groups? Do some users need extra time to pass through a door, such as to accommodate a food cart or wheel chair? Start thinking about these elements and begin organizing the data as soon as possible so you'll be ready when your equipment and software are ready. It is a good idea to use a spreadsheet software such as Microsoft® Excel® for this purpose. That way you can sort the data to help you plan your segment.

Importing Data

Do you have an existing database that already contains much of the information you need? It is likely you can modify a version and import it into AMS using the program's System Administrator feature. If you have a large organization, this will save you time and reduce data entry error. See "Importing Data from a Legacy OFM Database" on page 170.

Install Software (Task 5)

The AMS software is installed in three steps: Install the Database Server component, Install Wi-Q AMS Web Services, Install Applications.

Note The installation may detect missing prerequisites during the installation process. Have your original Microsoft Windows installation disks ready for use if prompted (Configuration #5 – Server PC (Pro and Enterprise Region Systems)). In addition, be prepared to address the following conditions during the setup:

If...	Then
If you plan to use a secure socket layer (SSL) connection (connecting via the internet)	A valid certificate must be obtained from a certificate authority for IIS. See your Network Administrator.
You plan to use a basic authentication	A local administrator user account, login, and password must be generated for the system to log into. (Instructions are presented in Portal Gateway Setup, Setup tab, Host Access Settings.)
You plan to use certificate mapping	A client certificate file must be generated. See your Network Administrator.

Beginning Installation

- 1 If you have not already done so, download the Wi-Q AMS Software from the Stanley Technical Support website

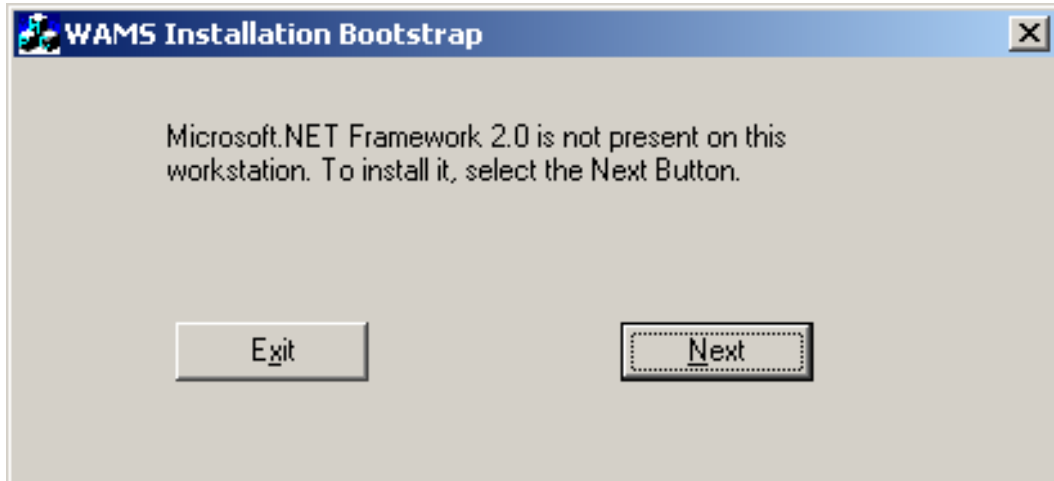
or

Insert the software disc into your machine's disc reader.

Note If you have downloaded the installation files to your machine, it is recommended that you save the folder directly on your local hard drive to keep the path to the files as short as possible.

- 2 Click on the .exe file that contains "Bootstrap"
(Example: WiQBootstrap.exe).
- 3 Wi-Q AMS Setup checks your workstation for any missing prerequisites, such as Microsoft.NET Framework. If the following dialog box opens, click Next. If not, proceed to Step 4.

Figure 19 Installation Bootstrap



- a The Microsoft .NET Framework Setup wizard welcome screen opens. Click Next to continue.
- b Read the End-User License Agreement. To continue with the installation, click the checkbox at the bottom. Then click Install. The installation may take a few minutes.
- c When the installation is complete, click Finish.

Note It is recommended that you reboot your machine after any missing prerequisites are installed before continuing on with the installation.

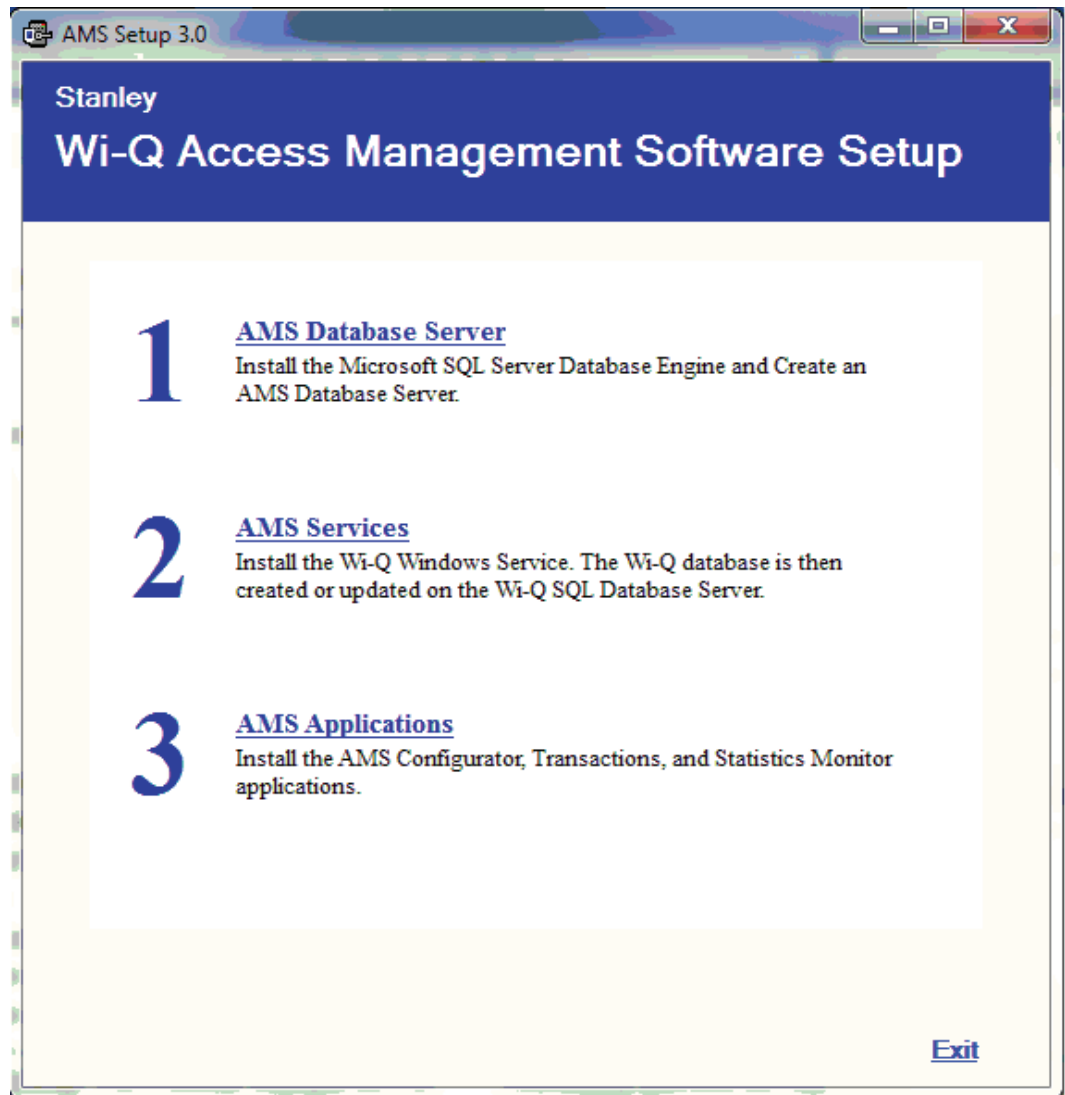
- d After rebooting your machine, click the "Bootstrap" .exe file again.

- 4 The AMS Setup Main page opens, Figure 20. It is important to perform the steps in the sequence presented.

Note You may wish to install the services and database on one machine (such as the Host) and the AMS Applications only at other machines. This can be done by selecting the appropriate application from the System Setup windows.

Note The screen shots in this User Guide are from a Stanley Wi-Q AMS system.

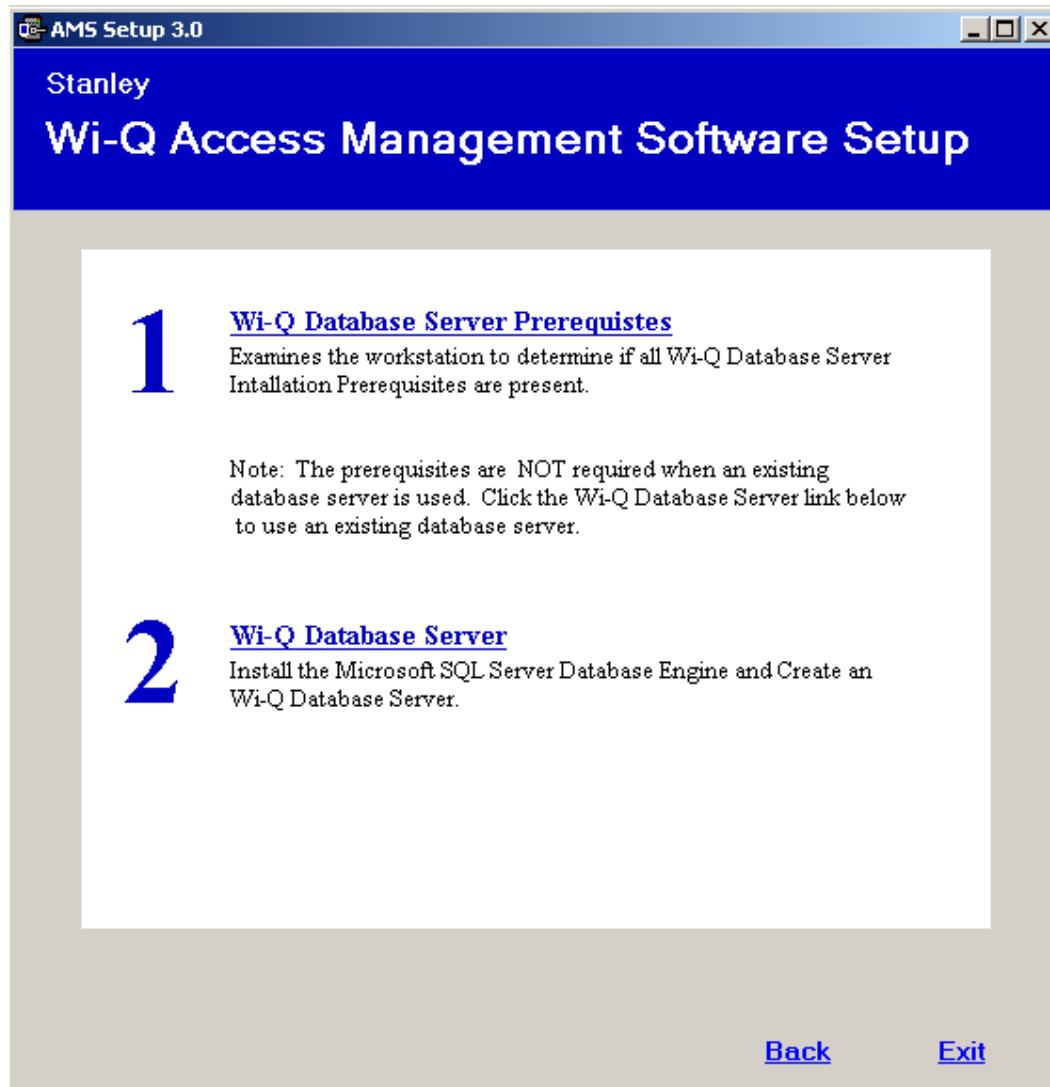
Figure 20 AMS Setup



Step 1

- 1 Click the AMS Database Server link. If a similar dialog box opens with a link to install Prerequisites, click the link.

Figure 21 Database Server Prerequisites



- 2 You may be prompted to install a number of prerequisites, including Microsoft Windows Installer and Windows PowerShell. To install the latest versions of these prerequisites, it is recommended that you click the website links provided and download directly from the Microsoft website. Once you've downloaded the setup files, follow the installation prompts provided.

Note It is recommended that you reboot your machine after any missing prerequisites are installed before continuing on with the installation.

- 3 Once all the prerequisites have been installed, click the link on the main setup screen to install the AMS Database Server.
- 4 The Database Server System Definition dialog box opens. Choose whether to install the server on a local machine or within an existing SQL Server instance. If you choose to install on a local machine, decide whether to use the default password or define a new password. If you choose to install within an existing server, enter the instance name and associated user name and password. Then click Finish.

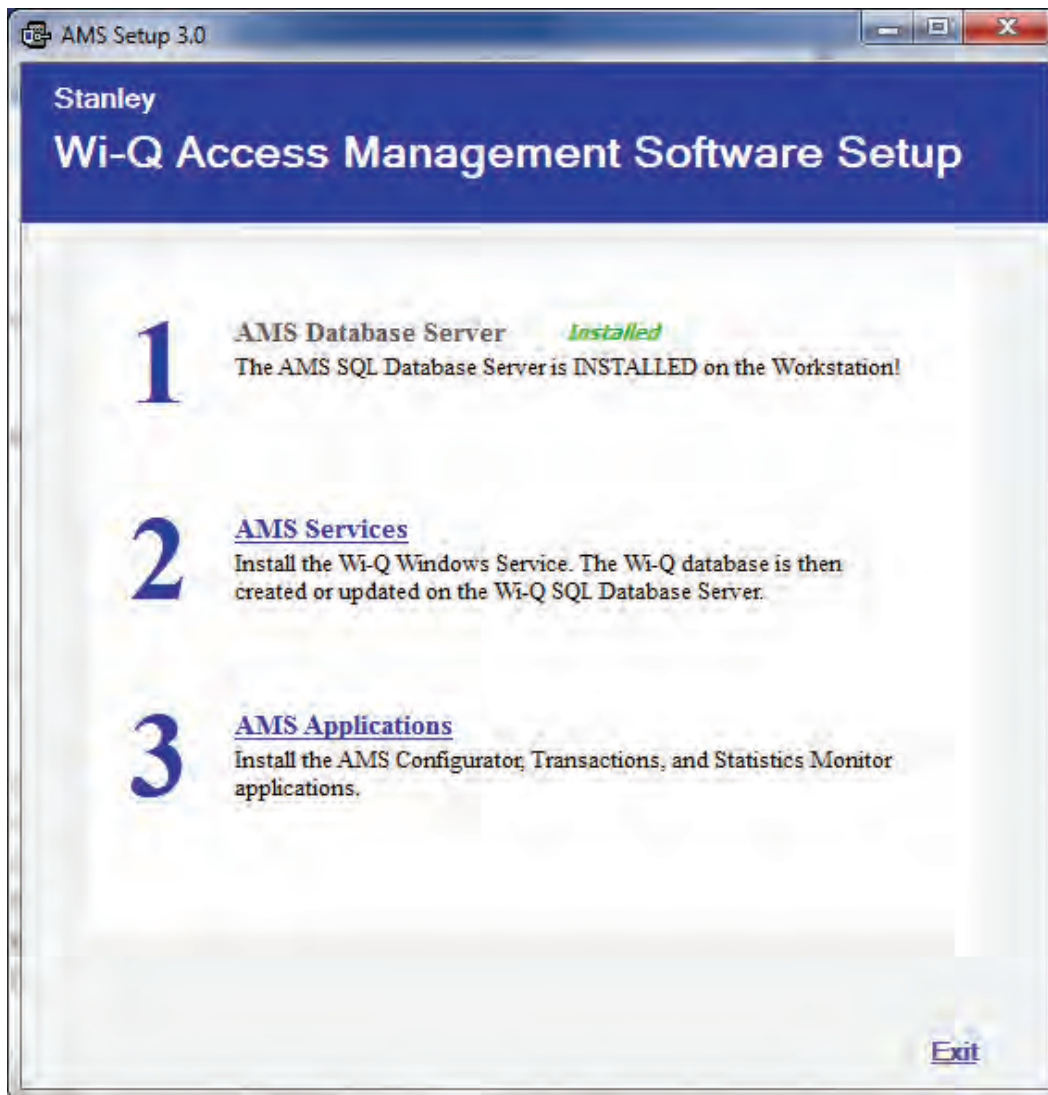
Figure 22 Database Server System Definition

The screenshot shows a dialog box titled "Database Server System Definition". The main instruction is "Define the Database and System Administrator (sa) Password." There are two main options: "Install OSI instance on local machine" (checked) and "Install within existing SQLSERVER instance" (unchecked). Under the first option, there are two radio buttons: "Use Default Password (osi)" (selected) and "Define Password". The "Define Password" option has two text boxes labeled "Enter Password:" and "Retype Password:". Under the second option, there are three text boxes labeled "Instance Name:", "User Name:", and "Password:". The "Instance Name:" box has a hint text "Ex: APACHE-GY3H1\OSI". At the bottom, there are "Cancel" and "Finish" buttons.

- 5 The SQL Database Server will install now. This may take several minutes.

- 6 When the server is successfully installed, you will see “Installed” next to Step 1. As you work through the process, steps that have been completed or don’t need attention will no longer have clickable links.

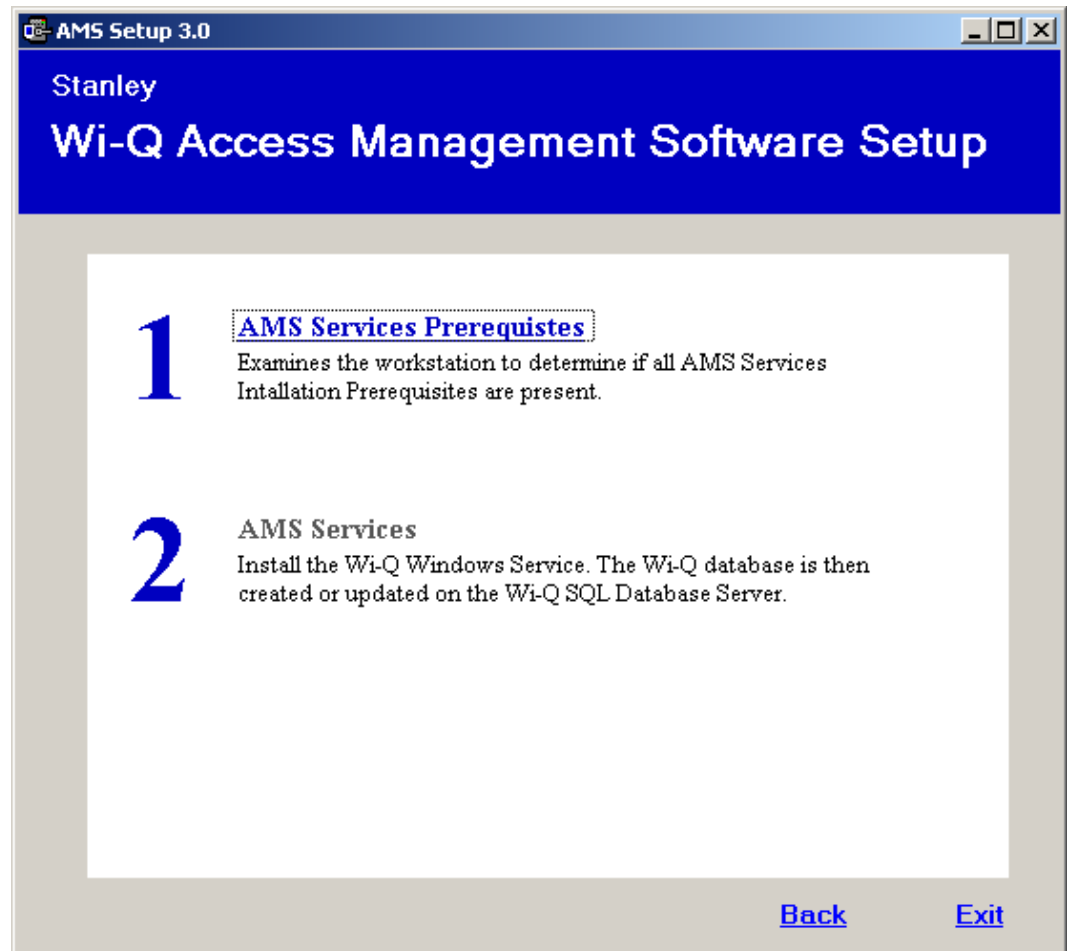
Figure 23 AMS Database Server Successfully Installed



Step 2

- 1 On the Setup main page, click the AMS Services link.
- 2 If a similar dialog box opens with a link to install Prerequisites, click the link.
See Figure 24.

Figure 24 Install Prerequisites



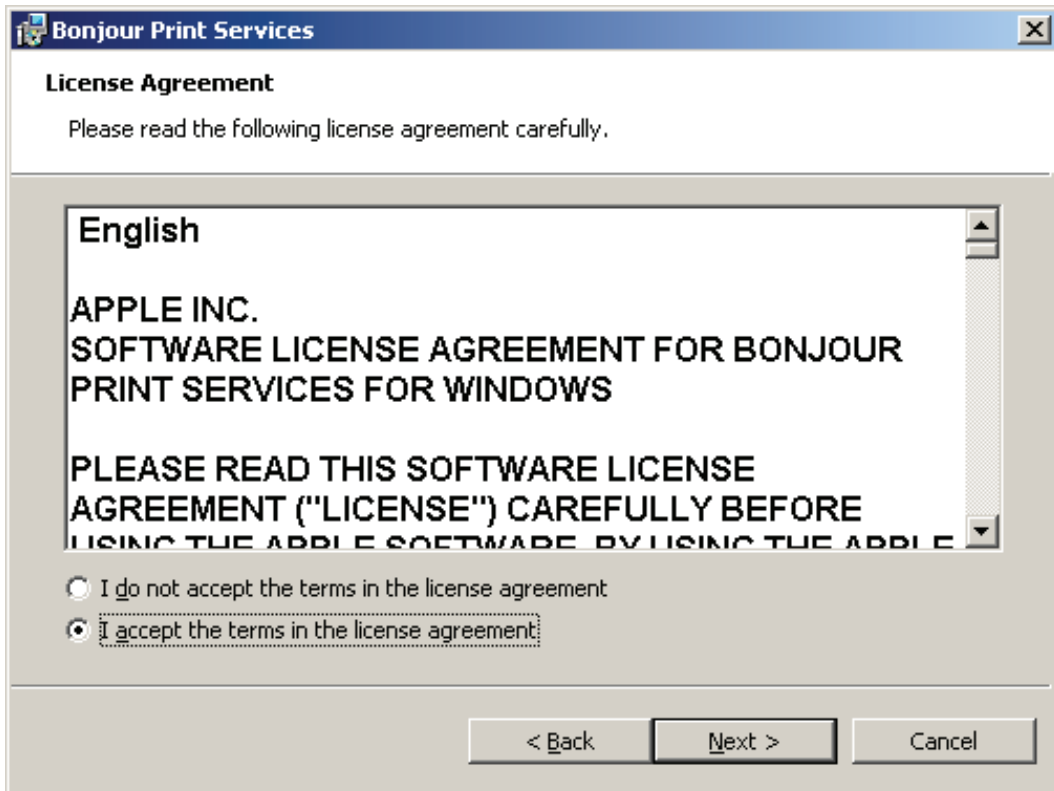
- a You may be prompted to install Apple® Bonjour®. Bonjour networking technology is used by the Portal Configuration Tool to locate and list all Portal Gateways on the network. Click the link to begin installing Bonjour.
- b The Bonjour Print Services window opens. Click Next to continue.

Figure 25 Bonjour Print Services Installer



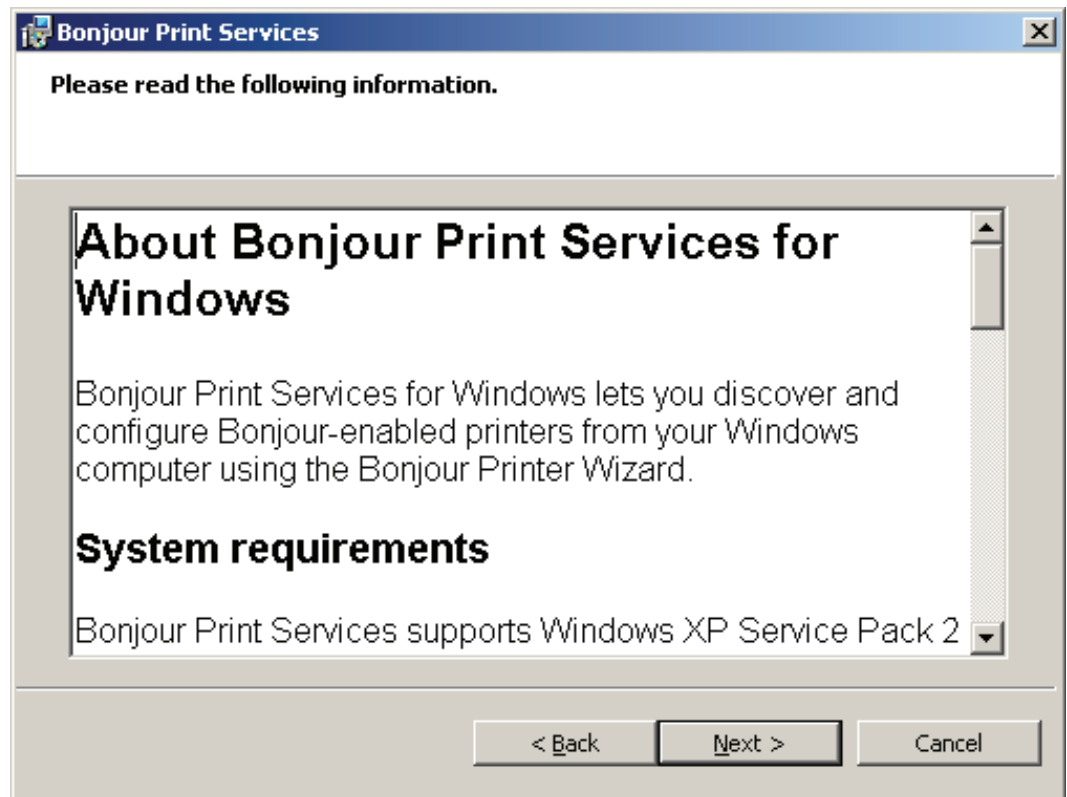
- c Read the License Agreement. To continue with the installation, click on "I accept the terms in the license agreement," then press Next.

Figure 26 Bonjour Print Services License Agreement



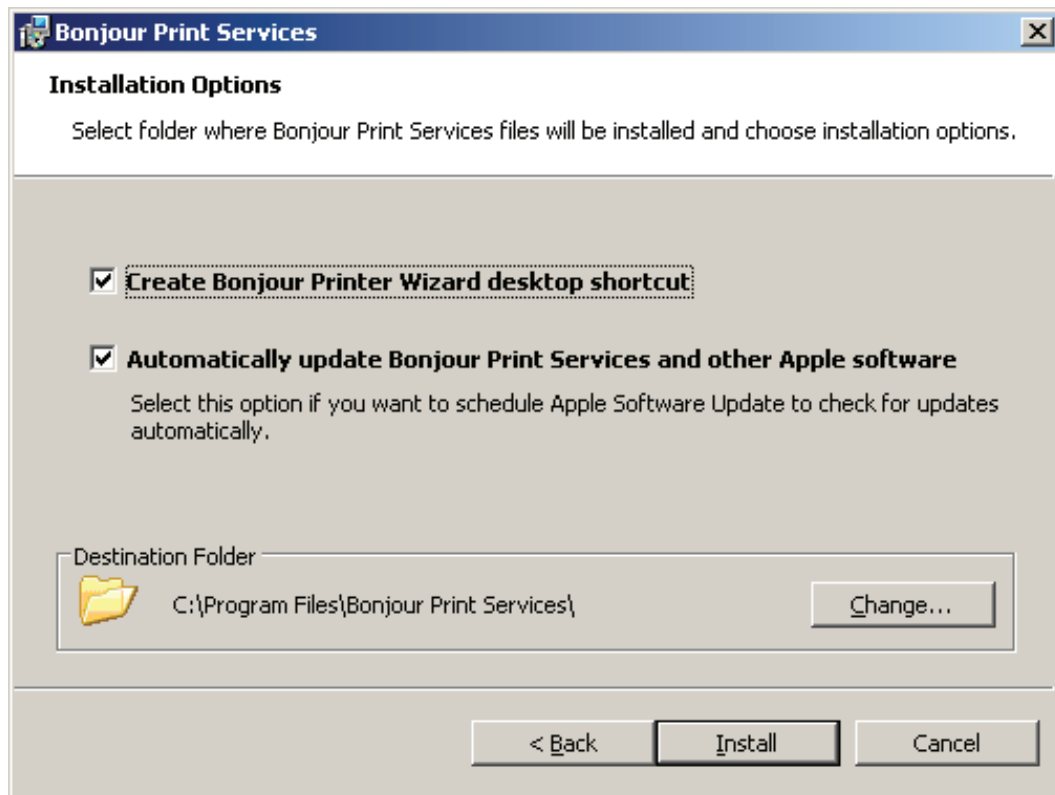
- d Read the information about Bonjour Print Services. Then press Next.

Figure 27 Bonjour Print Services Information



- e In the Installation Options section, decide whether or not to create a desktop shortcut and/or schedule automatic updates for Bonjour. Choose your destination folder and then select Install.

Figure 28 Bonjour Installation Options



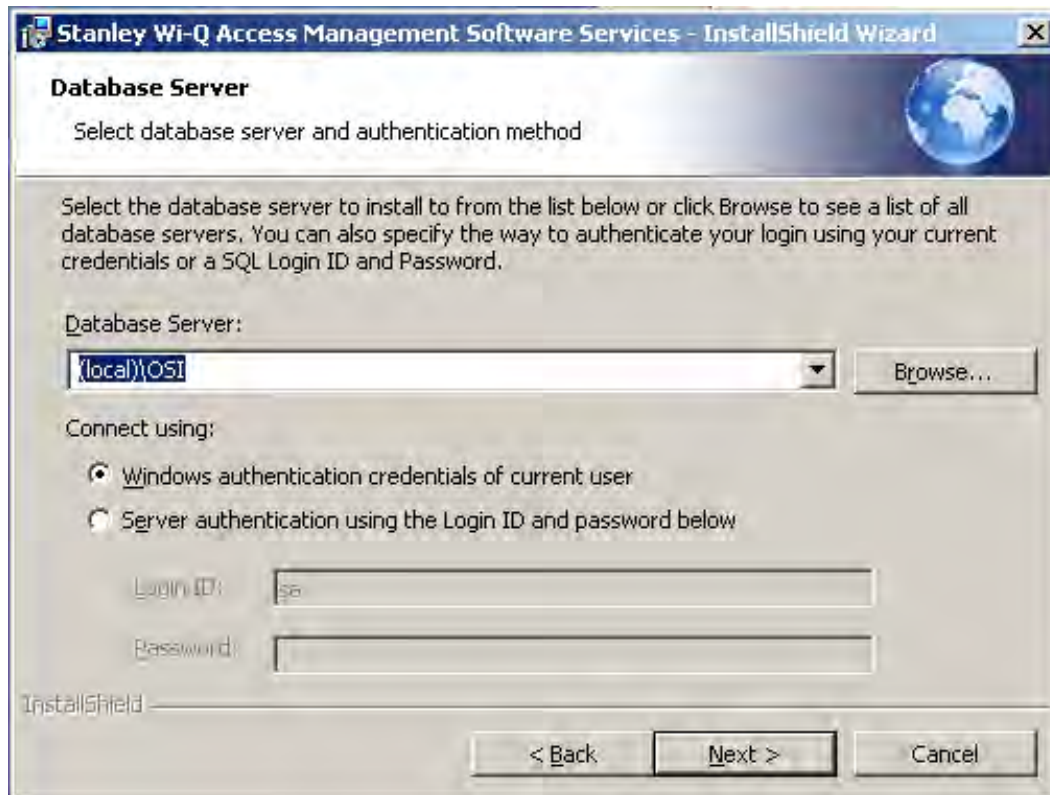
- f Once the Bonjour Print Services Installation is complete, press Finish.

Figure 29 Bonjour Print Services Installation Complete



- 3 Click on AMS Services to install the Wi-Q/Omnilock Windows Service and create a database.
- 4 Click Next to continue past the Welcome page.
- 5 On the Database Server dialog box, browse to your database server and select your connection method. In the Connect Using section, choose your connection method. If you choose Server authentication, provide the Login ID and Password for the server. See Figure 30

Figure 30 InstallShield Wizard Database Server



- 6 In the Setup Type dialog box (Figure 31), select a Complete or Custom install. Selecting Complete will run installations for the Database, Communication Service, Portal Config App and Wi-Q/Omnilock Service. Selecting Custom will allow you to choose which components to install. Once you've made your selection, press Next to continue.

Figure 31 Setup Type

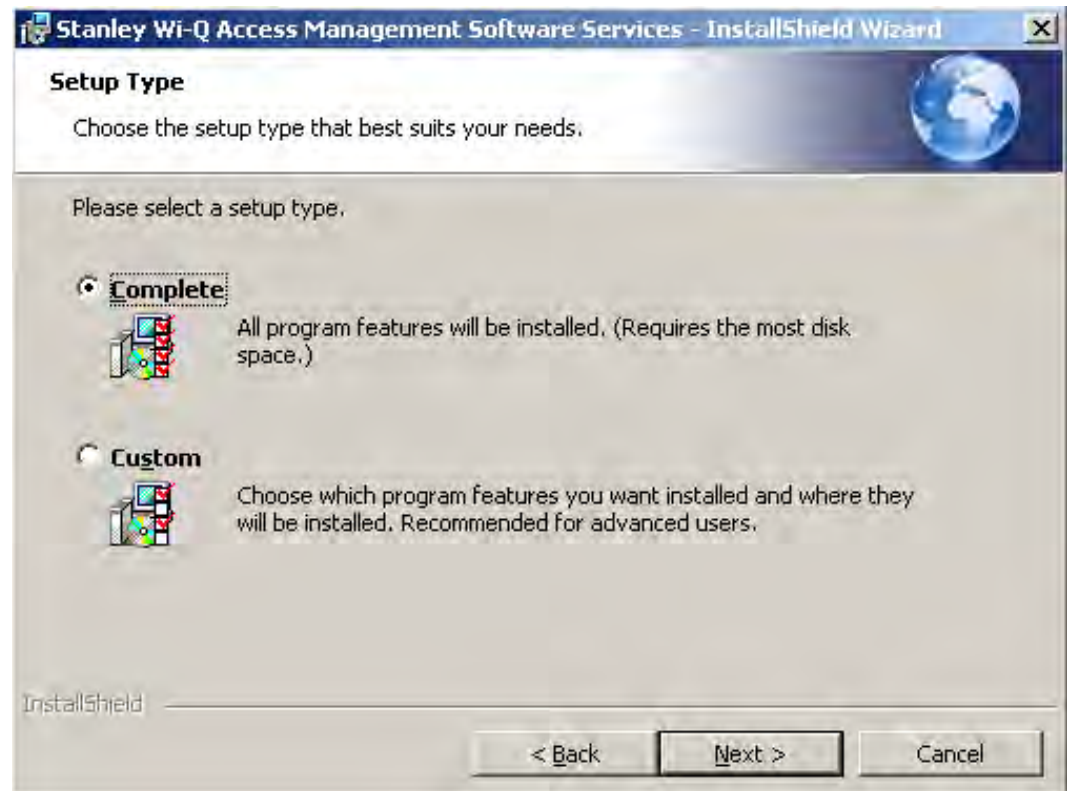
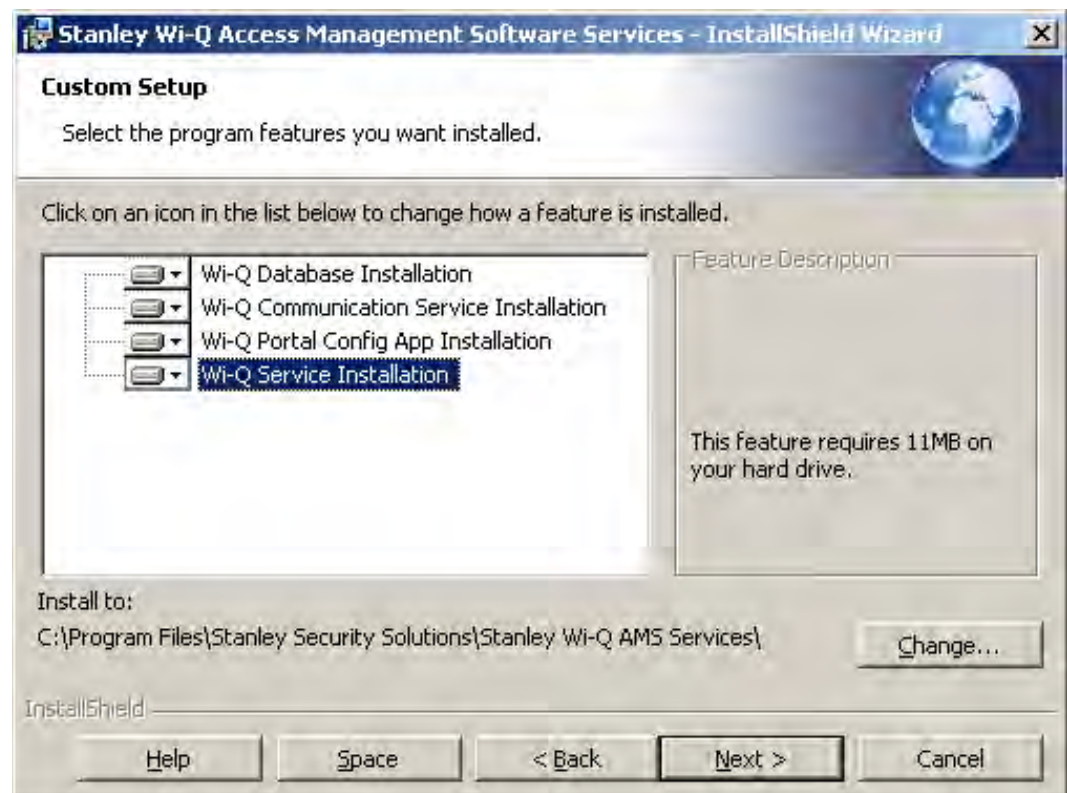


Figure 32 shows the installation components available in a Custom Setup.

Figure 32 Custom Setup



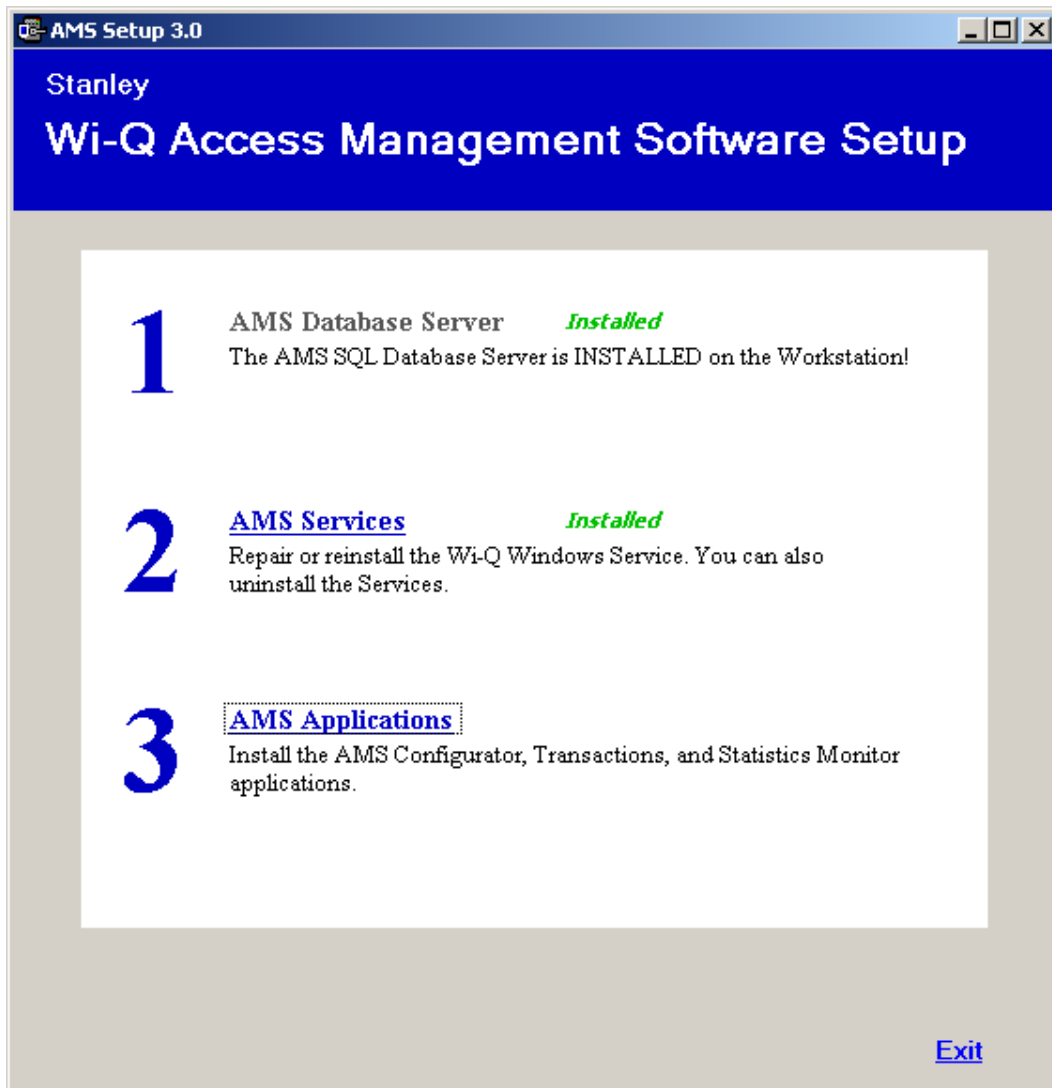
Clicking on the icons to the left of each component will bring up installation options. If you decide on a Custom Setup, you must select an installation option for each component. Then click Next to continue.

- 7 The wizard is now ready to begin installation. Click Install.
- 8 Once the installation is complete, click Finish.

Step 3

- 1 On the Setup main page, click the AMS Applications link.

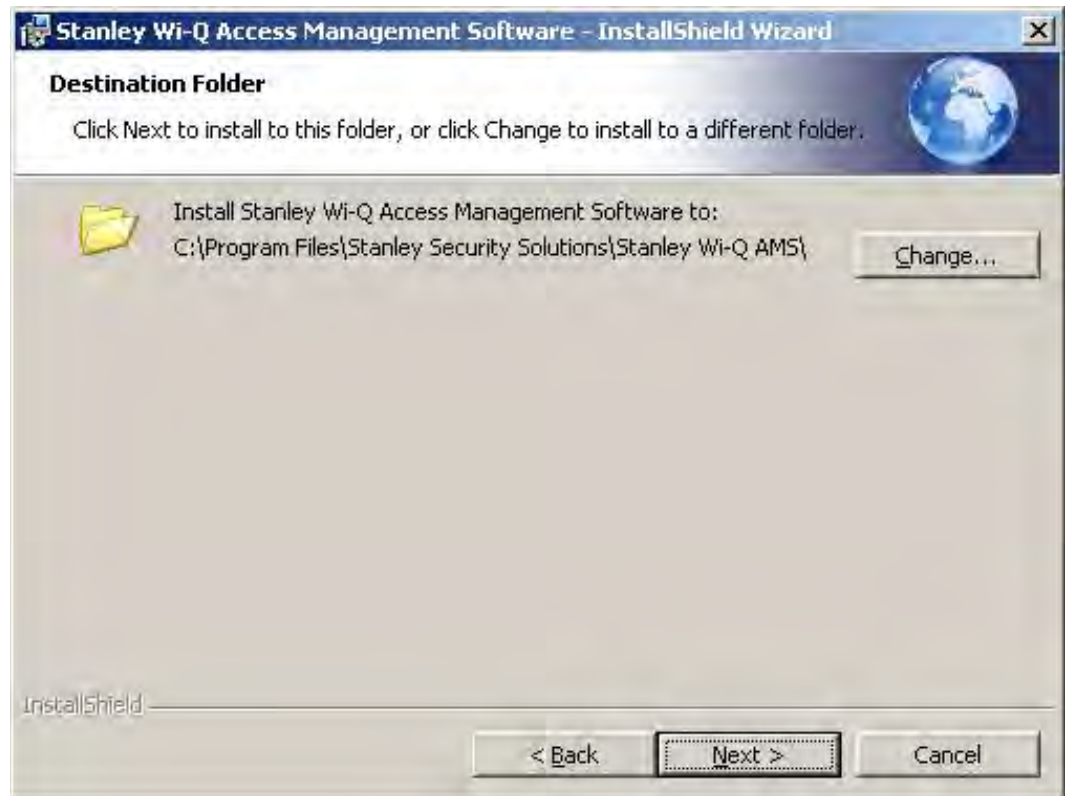
Figure 33 Install AMS Applications



- 2 On the InstallShield Wizard Welcome screen, click Next to continue.

- 3 On the Destination Folder screen, click Change if you would like to change the install folder location and browse to the desired location. Then, click Next.

Figure 34 Destination Folder



- 4 In the Setup Type dialog box, select a Complete or Custom install. Selecting Complete will run installations for the Configurator, Transactions, Administrator, Status Monitor and Reports applications. Selecting Custom will allow you to choose which components to install. Once you've made your selection, press Next to continue.

Figure 35 shows the installation components available in a Custom Setup.

Figure 35 Custom Setup

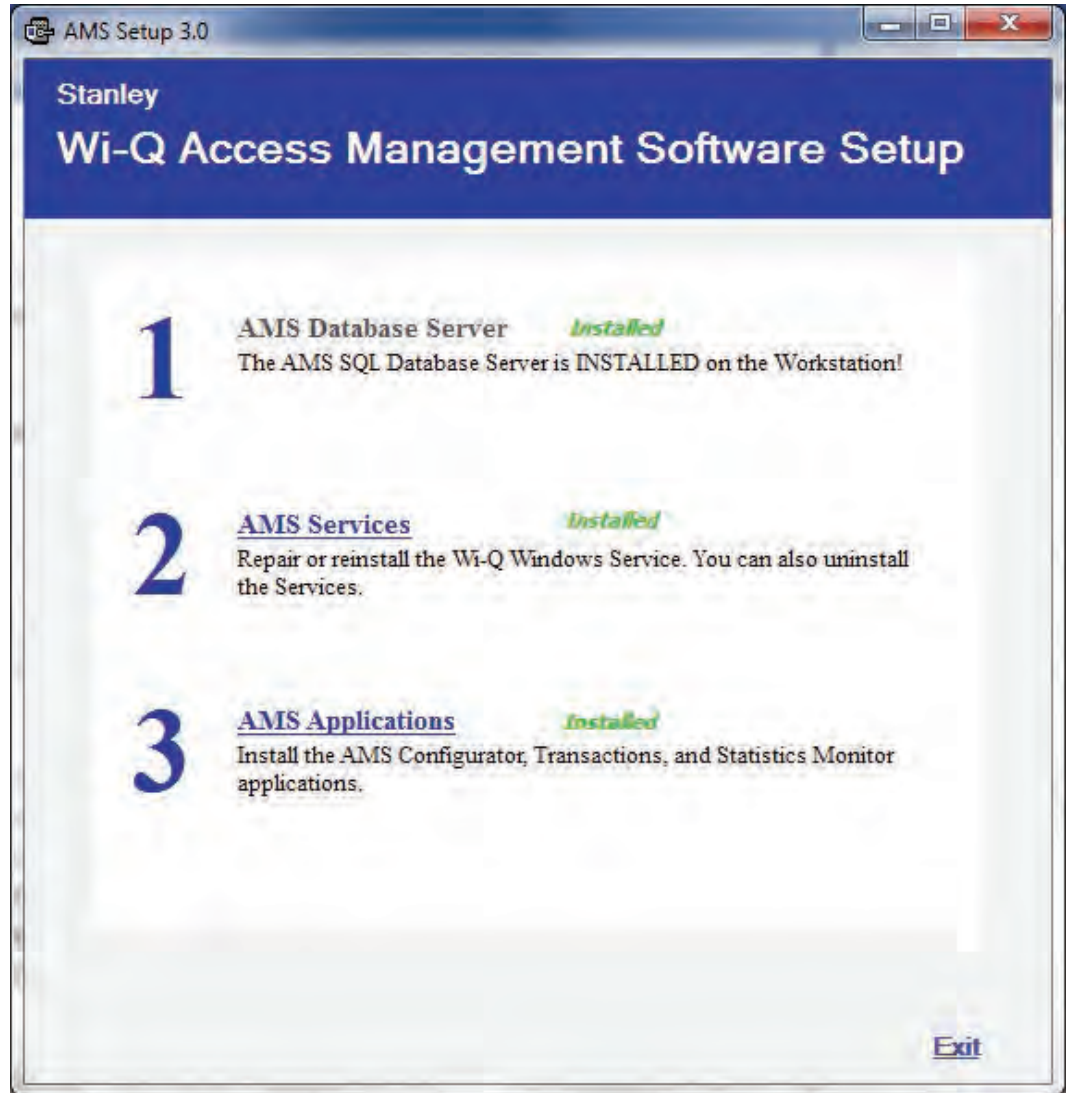


Clicking on the icons to the left of each component will bring up installation options. If you decide on a Custom Setup, you must select an installation option for each component. Then click Next to continue.

- 5 The wizard is now ready to begin installation. Click Install.
- 6 Once the installation is complete, click Finish.

The installation of all three components is now complete.

Figure 36 Successful System Setup



Click Exit on the Setup window. Wi-Q AMS will be accessible through your Start Menu.

Note It is recommended that you reboot your machine after installation is complete. If you chose a non-standard database server location in Step 1, you must reboot your machine now.

4 Configuring Segments, Portal Gateways and Controllers

This chapter contains detailed steps to perform the following tasks:

- Task 6: Create your Segment
- Task 7: Add and Configure Portal Gateways
- Task 10: Sign on and Configure Controllers

After segment creation, this chapter discusses Portal Gateway and Controller configuration. However, it is perfectly acceptable to add Users, User Groups and any special Timezones you will need before configuring Portals and Controllers. An advantage to adding Users and User Groups before you add Portals and Controllers is that they will be available as you configure each new Portal and Controller in the system. You can also add Portals, Controllers, users and user groups as you go, building the system in any way that makes it efficient with the data that you have available.

Note The terms “Controller” and “Reader” are used synonymously throughout this chapter.

Create Your Segment (Task 6)

It is important to give some thought to how you will go about configuring a segment in AMS. If you have not already done so, it may be helpful to review the Getting Started Guide.

Logging in to Configurator

To get started, open your Configurator module. You can access it via the icon on your desktop or from the Windows Start Menu (Programs>Stanley Security Solutions).

The Wi-Q AMS splash screen appears briefly, then the Login dialog box opens.

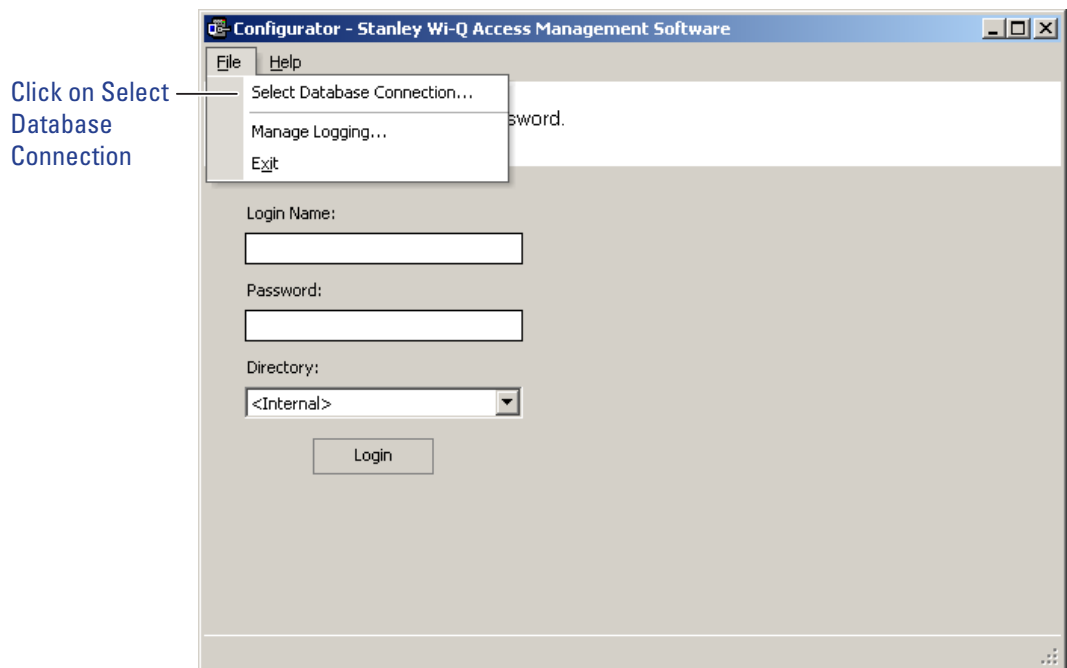
Selecting the Database Connection

When you start up AMS, the system defaults to the database installed on the Host computer. If for some reason your database resides on a computer other than the one running AMS, you must select the database before you login.

To select a database on a different computer

- 1 From the File menu, select Select database connection from the drop-down list.

Figure 37 Select Database Connection



The Database Connection dialog box opens. See Figure 38.

Figure 38 Database Connection Window

Database Connection

Establish the Database Connection Criteria.

Server: (local)\MSI Refresh

Connect Using:

☒ Windows authentication

☐ SQL Server authentication

Login Name:

Password:

☐ Save Password

Test Connection Cancel Finish

- 2 In the Server field, select the server location from the drop-down list.
- 3 Under Connect Using, select either Windows authentication or SQL Server authentication. If you select SQL Server, enter the login name and password for that server.
- 4 Click Test Connection.
- 5 Click Finish. You are ready to login to AMS using your desired database.

Login Information

When you enter the system for the first time, the default, case-sensitive, User Name and Password are:

Login: Admin

Password: Admin

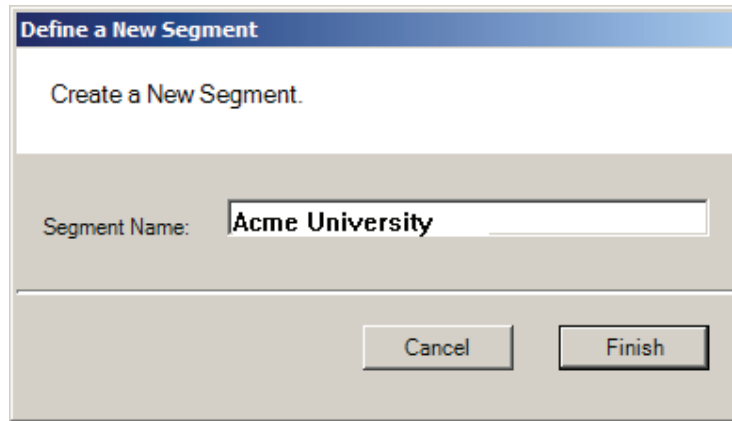
- 1 Enter the Login Name and Password.
- 2 Select Login. You are ready to start setting up your new segment.

When you select Login, the Define a New Segment dialog box opens.

Define a New Segment

- 1 In the Segment Name box, enter a unique name for your segment.

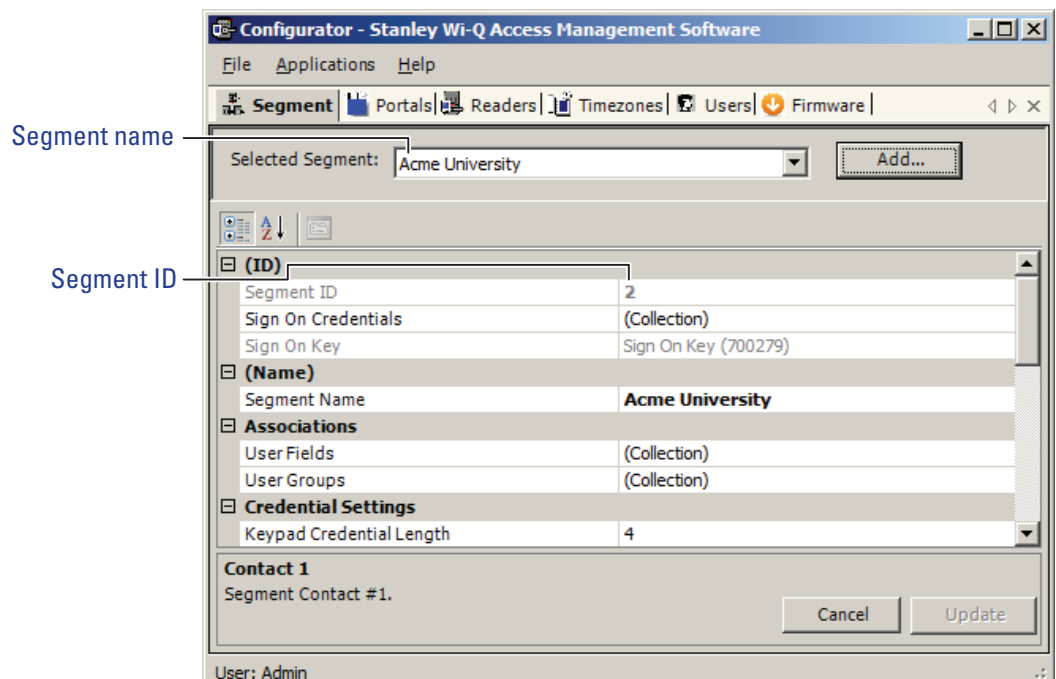
Figure 39 Define a New Segment



The dialog box titled "Define a New Segment" has a blue header bar. Below the header, it says "Create a New Segment." There is a text input field labeled "Segment Name:" containing the text "Acme University". At the bottom, there are two buttons: "Cancel" and "Finish".

- 2 Select Finish. The Configurator dialog box opens on the Segment Tab. The new segment name appears in the Selected Segment box and AMS assigns it a unique Segment ID.

Figure 40 Identifying the Segment name and ID



The "Configurator - Stanley Wi-Q Access Management Software" window shows the "Segment" tab. The "Selected Segment:" dropdown menu displays "Acme University". A blue arrow labeled "Segment name" points to this dropdown. Below, a table lists segment details. A blue arrow labeled "Segment ID" points to the "Segment ID" field in the table.

(ID)	
Segment ID	2
Sign On Credentials	(Collection)
Sign On Key	Sign On Key (700279)

(Name)	
Segment Name	Acme University

Associations	
User Fields	(Collection)
User Groups	(Collection)

Credential Settings	
Keypad Credential Length	4

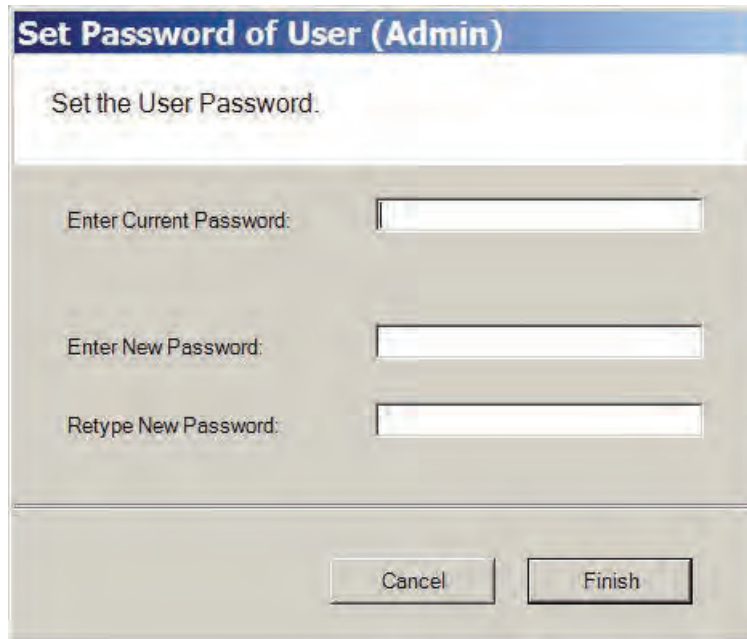
At the bottom, there is a "Contact 1" section with "Segment Contact #1." and "Cancel" and "Update" buttons. The status bar at the bottom shows "User: Admin".

Note Once you have successfully logged in, it is recommended that you change the default User Name and Password to ensure system security.

To change the Password

- 1 At the top left corner of the Configurator dialog box, select File>Change Password. The Set Password of User dialog box opens.

Figure 41 Set Password of User



The image shows a dialog box titled "Set Password of User (Admin)". Inside the dialog, there is a text label "Set the User Password." followed by three input fields. The first field is labeled "Enter Current Password:", the second is labeled "Enter New Password:", and the third is labeled "Retype New Password:". At the bottom of the dialog, there are two buttons: "Cancel" and "Finish".

- 2 Enter the new password
- 3 Retype the new password.
- 4 Select Finish.

WARNING: Be sure to keep a record of your new password in a locked safe that is available to your senior management team!

Add and Configure Portal Gateways (Task 7)

Portal Gateways can now be added and configured within the software. Portals are configured from the factory with an IP address of 192.168.1.200. When configuring a Portal Gateway, it is best to connect directly to the Portal before placing it on the network. This removes the possibility of duplicate IP addresses on the network.

You can change the IP address of your Portals with the Portal Configuration Module.

Note All Portal Gateway IP address must be unique across the entire system.

Configuring a Portal Gateway with the Portal Configuration Module

Perform the following steps to change your Portal Gateway's IP address.

- 1 Connect the Portal Gateway to the Host either over the network or directly via crossover Ethernet cable (recommended). For more information on connecting a Portal Gateway, see "Connecting the Portal Gateway and Verifying Operation" on page 24.
- 2 Open the Portal Configuration module (Start Menu>Stanley Security Solutions>Stanley Wi-Q AMS Tools).
- 3 Portals available on the network will automatically be listed in the Portal Configuration module.

Figure 42 Portal Gateways Available on the Network



- 4 Select a portal from the list.
- 5 At this point, you may change the IP address from the factory setting to one from the range you've created. Click on Update IP Configuration to update the selected portal.
- 6 Select IPv4 and/or IPv6 and enter the IP address.
- 7 You may need to adjust the SubNet Mask/Network Destination and Gateway to match your network. Consult your network administrator for details.
- 8 If you wish to generate a SSL certificate for a more secure connection, click on the SSL Enabled checkbox, then click OK.

Note If you enable SSL, you must create a certificate and load the certificate into your system.

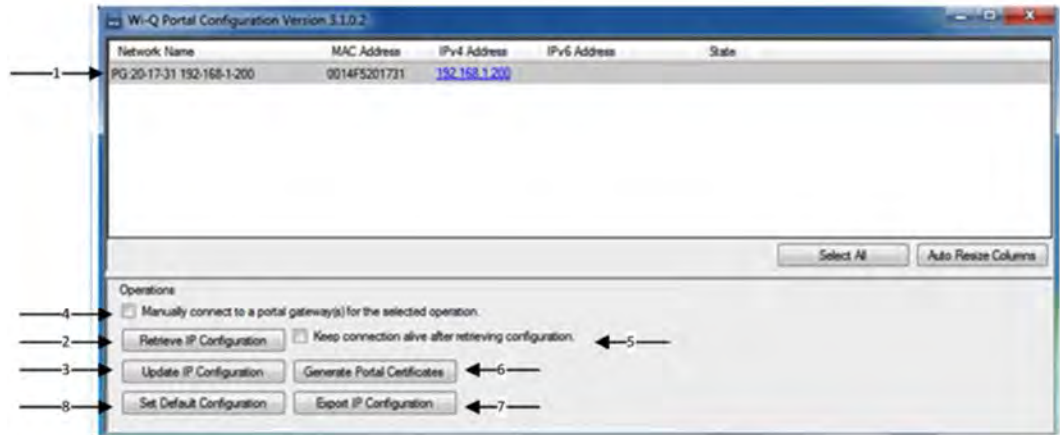
Figure 43 Update IP Configuration

The screenshot shows a window titled "Update IP Configuration". It contains two panels. The left panel, "IPv4 Configuration", has a checked checkbox and fields for IP Address (192.168.1.200), Subnet Mask (255.255.255.0), Gateway (192.168.1.20), Portal Service Port (8000), and Portal Config Service Port (11000). It also has an unchecked "SSL Enabled" checkbox and a "Fill Default" button. The right panel, "IPv6 Configuration", has an unchecked checkbox and empty fields for IP Address, Network Destination, Gateway, Portal Service Port, and Portal Config Service Port. It also has an unchecked "SSL Enabled" checkbox and a "Fill Default" button. At the bottom are "OK" and "Cancel" buttons.

Portal Configuration Features and Functions

Review this section for additional information regarding the Portal Configuration window. See Figure 44.

Figure 44 Portal Configuration Window



1 Portals on the Network grid

Provides a list of Portal Gateways on the network. It shows the status of the last operation performed, the portal network name, a hyperlink that opens the corresponding status page, portal MAC address and portal IP configuration data.

2 Retrieve IP Configuration Scan

When checked, attempts to retrieve the current IP Configuration for the corresponding portal. This requires direct communication with the portal configuration service, which only runs for one hour after a reboot. If the service is not running, the IP Configuration data will return unknown data.

3 Update IP Configuration

Updates the IP Configuration of the selected portal. This requires direct communication with the portal configuration service. The "New Portal IP Configuration" fields are used for the new IP Configuration data.

4 Manual Connection

When checked, allows a portal to be configured by IP address. Some net-

works do not allow port 5353 to be open, which is required by the application when scanning for portals. This allows manual connection to the portal so the portal can be configured. You must click on Update IP Configuration after selecting this box.

5 Keep Connection Alive Checkbox

Allows the connection with the portal to continue, otherwise a reboot will occur after the action selected.

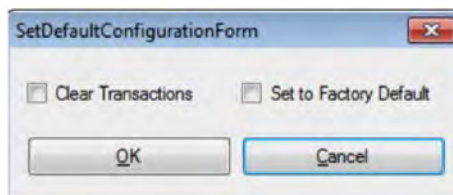
6 Generate Portal Certificates

Generates a portal certificate that is sent to the portal and stored to the file system. Enable this box when data encryption is required. Multiple portals can be selected when generating certificates.

7 Export Portal IP Configuration

Exports the portal IP configuration for the selected portals.

Set Default Configuration



Clear Transactions

When checked, allows you to clear all transactions from portals you select in the list above. This may be selected in combination with the Set Back to Factory Default checkbox. .

Set Back to Factory Default

When checked, allows you to set change the IP address(es) of the portal(s) you select in the list above back to factory default (192.168.1.200). This may be selected in combination with the Clear Transactions checkbox.

Once you've configured your Portal Gateways with the Portal Configuration module, you can add them into your Wi-Q AMS Software.

Adding Portal Gateways to AMS

Portals can be added to your system in two ways:

- **Adding** — normally use this method if the number of Portal Gateways is manageable. This is a manual method that requires manual entry of the IP address of each Portal Gateway.
- **Bulk Importing** — normally use this method for large systems. This is done through the System Administrator application through the 'Import Portals' selection.

Adding Portal Gateways One at a Time

Refer to Figure 45.

- 1 In the Configurator application, click the Portals Tab.
- 2 Click Add and the Configure New Portal Gateway screen opens.
- 3 In the Workstation field, select the location of your server.
- 4 Enter the name and description of the Portal Gateway.

Note Normally name Portal Gateways by their location. For large systems, work out a naming scheme that makes it easy to locate the Portal Gateway in your segment.

- 5 Enter the IP address of the Portal Gateway. You will need to get IP addresses from your network administrator.
- 6 Enter the port.

Figure 45 Configure New Portal Gateway screen

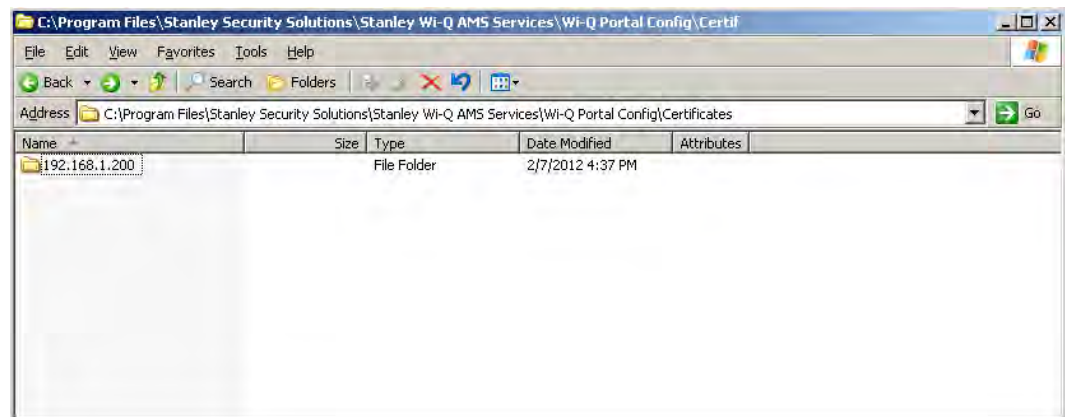
Tom's Test Segment	
PG200	
Virtual Portal Test	
IPv6 Portal Test	

(Address)	
MAC Address	Waiting for Sync
Workstation	WIN-FL6P3DQ7V15
(Name)	
Portal Name	IPv6 Portal Test
Description	IPv6 Portal Test
(Portal Connection)	
IP Address Used	2001:0db8:0000:0000:0000:ff00:0042:8329
IPv4 Address	192.168.1.201
IPv6 Address	2001:0db8:0000:0000:0000:ff00:0042:8329
IPv6 Enable	True
Port	8000
Configuration	
Statistics Update Interval	1 Days
Assigned to Channels	ALL CHANNELS
Uploaded Transactions	
Transaction Settings	Transaction Masks

- 7 Click the ellipsis button next to the Channels field and select at least two channels that the Portal Gateway will use to communicate. Check with your network administrator to make sure the channels are available.

- 8 Click the ellipsis button next to the Update Interval field. Here you can set how often the system will update the Portal Gateway with changes you've made to users, readers, timezones, and other functional changes to the database.
- 9 Click the ellipsis button next to the Transactions field to select which, if any, Portal Gateway transactions you want to enable and which you want to make a 'priority.' Priority transactions will be uploaded immediately rather than waiting for the next 'update interval' that was set in the field above. Two transactions are available:
 - Portal Firmware Update
 - Portal Radio Start FailedIf you click on Select All, a dialog box window will ask you to confirm your choice and it will also ask if you would like to enable priorities as well.
- 10 If you generated SSL certificates within the Portal Configuration module, you may browse to your Portal Gateway's certificate by clicking on the ellipsis button next to the SSL Certificate field. The Certificate can be found in your Program Files at the path shown below (Figure 46). The file is located within a folder named for the Portal Gateway's IP address. Select the file with the .pfx extension, and click Open.

Figure 46 Path to Certificate File



- 11 Click Finish.

The Portal(s) you have added will now be visible in the Segment Tree. See "Viewing the Segment Tree" on page 79. You can check the operational status of your Portal(s) by clicking on the top folder within your Segment Tree.

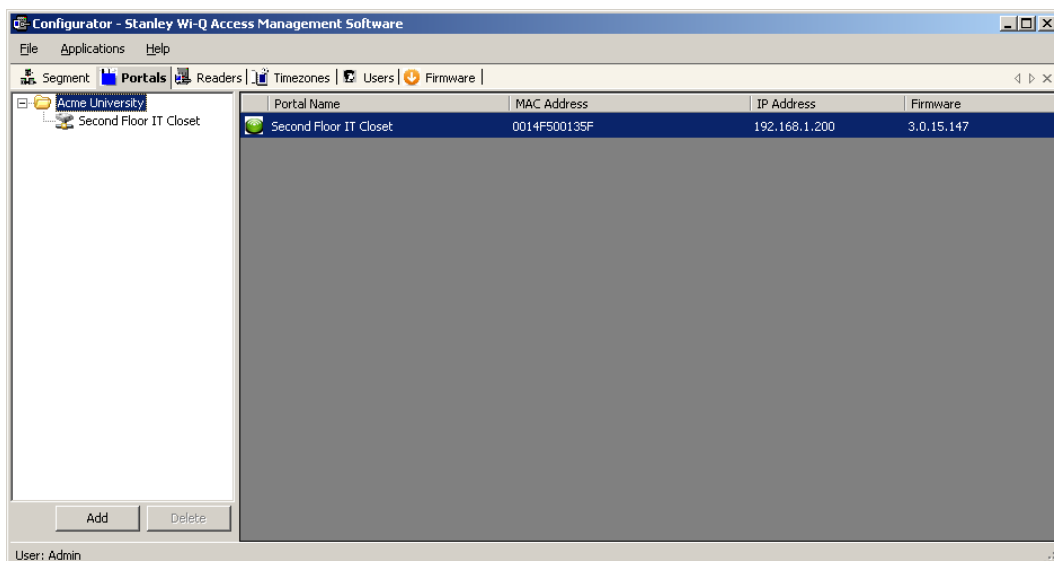
Portal Gateway Operational Status

When you are on the Portals tab within the Configurator module, you can click on the top folder within your Segment Tree, and the right side of the screen will change to a list of Portals in your system. The icon next to each Portal will give you the Portal's operational status. Five different status icons are present in the system for Portal Gateways:

Icon	Name	Description
	Question Mark	Device is loading.
	Green Circle	Device is online.
	Red X	Device is offline.
	Blue Down Arrow	Portal Gateway or Controller is not assigned to a workstation or the workstation is not running.
	Out-of-Date Firmware	Incompatible or Out-of-Date Firmware, all features may not be supported

If your Portal Gateways have blue down arrow icons, restart your Communication Server. See “Restarting your Communication Server”. After you restart your Communication Server, your Portal Gateway status icons should change to green circles, indicating that the devices are online. See Figure 47.

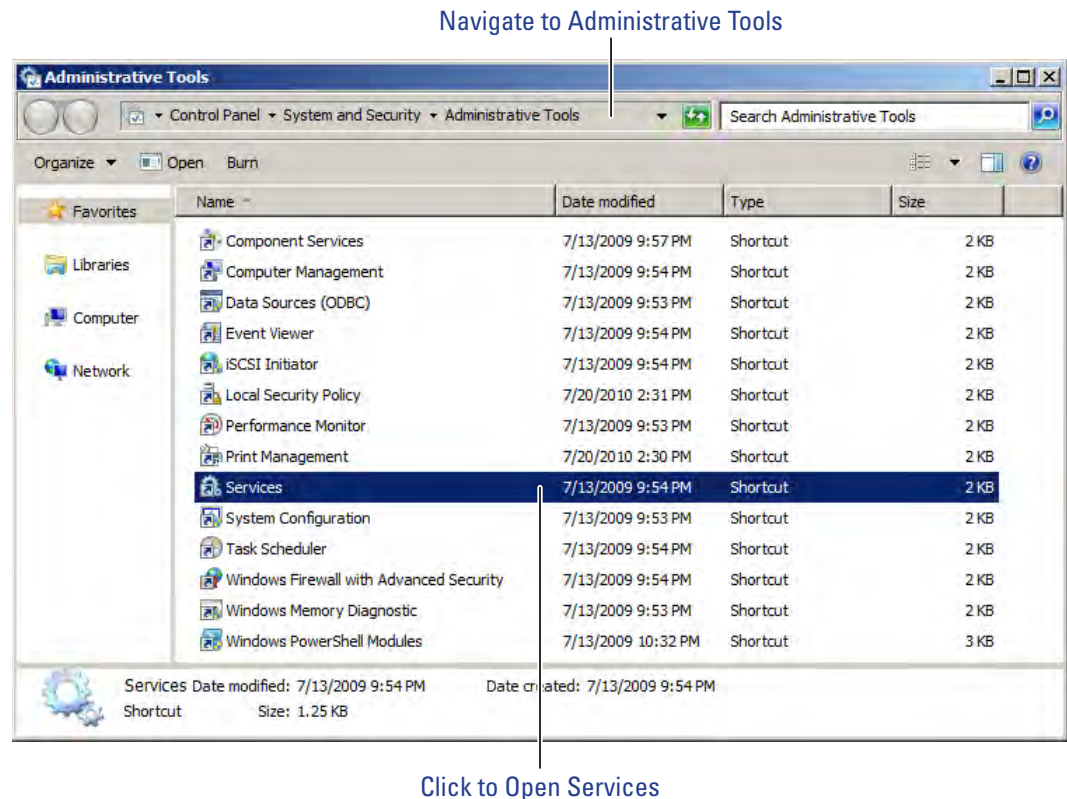
Figure 47 Portal Gateway with Green Circle Icon



Restarting your Communication Server

If you need to restart your Communication Server, navigate to your system's Services via Administration Tools. See Figure 48.

Figure 48 Navigate to Services



Next, locate "Stanley Wi-Q Communication Service" in the list of services. Right-click on the line and select Restart.

Importing Portal Gateways in Bulk

Before you can import Portal Gateways in bulk, you must generate an XML bulk import file using the Portal Configuration module.

Generating an XML Bulk Import File

The XML file you will generate documents and cross-references Portal Gateways' Mac addresses and IP addresses. Perform the following steps inside the Portal Configuration module.

- 1 Click on Scan to generate a list of Portals in your system.
- 2 Select all the Portals you wish to add to your AMS software.
- 3 Click on Export Portal IP Configurations (see Figure 44).
- 4 Choose a location to save your XML file, and click Save. Figure 49 shows a sample XML file.

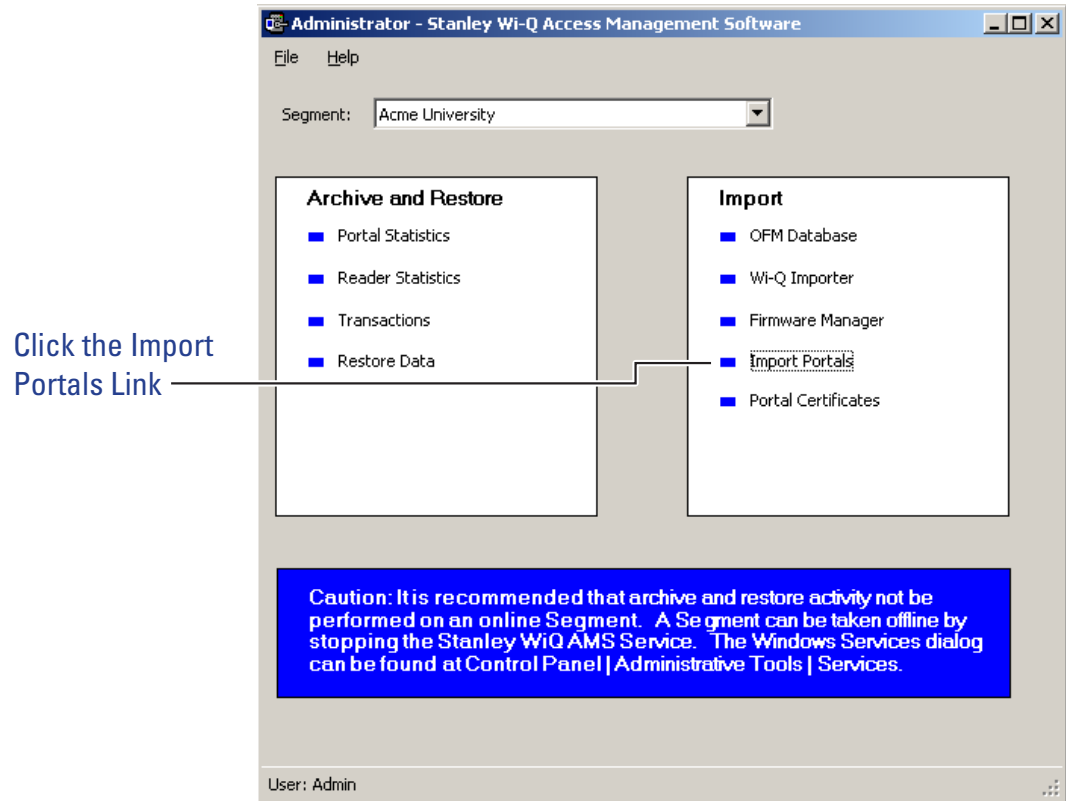
Figure 49 Sample XML file

```
<?xml version="1.0" ?>
- <Portals>
  <Portal MACAddress="00:14:F5:20:0B:6B" IPAddress="10.140.6.32" />
  <Portal MACAddress="00:14:F5:00:00:00" IPAddress="10.140.6.35" />
  <Portal MACAddress="00:14:F5:00:02:2B" IPAddress="10.140.6.31" />
</Portals>
```

Once you have generated your XML bulk import file, perform the following steps.

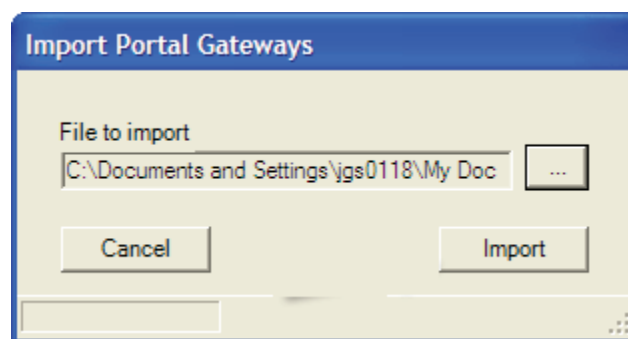
- 1 Start the System Administrator module (Applications dropdown menu inside Configurator).
- 2 Click the Import Portals link from the Import pane. See Figure 50.

Figure 50 System Administrator Portal Gateway Import



- 3 The Import Portal Gateways dialog displays.
- 4 Click the ellipsis button and locate the bulk import XML file.
- 5 Click Open.

Figure 51 Import Portal Gateways



- 6 Click Import.

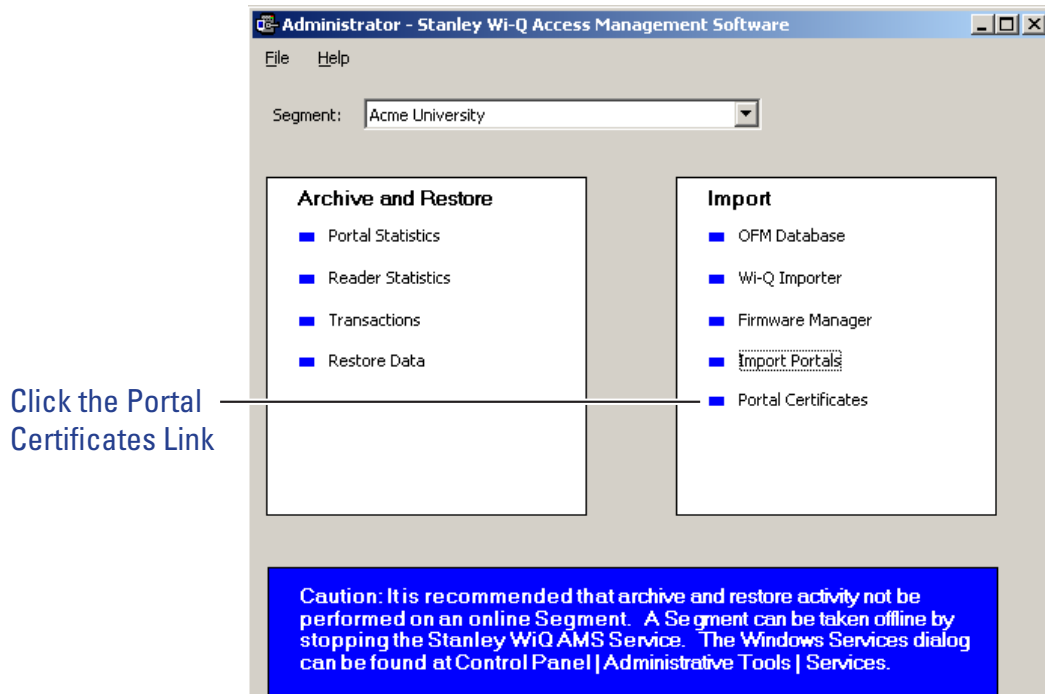
Note The Portals are imported (or updated) and a results box details the import. The MAC addresses should automatically show up in Portal Gateways' properties.

Importing Portal SSL Certificates

If you previously generated SSL certificates for your Portal Gateways, you may import them now. Perform the following steps.

- 1 From the System Administrator application, click the 'Portal Certificates' link under the Import pane. See Figure 52.

Figure 52 System Administrator Portal Certificates link



- 2 Choose the Portal Gateway that you want to import an SSL certificate to and click the ellipsis button next to it. Then find the certificate file (see Figure 46) and click Open.
- 3 When finished with importing all the Portal Gateway SSL certificates, click Finish.

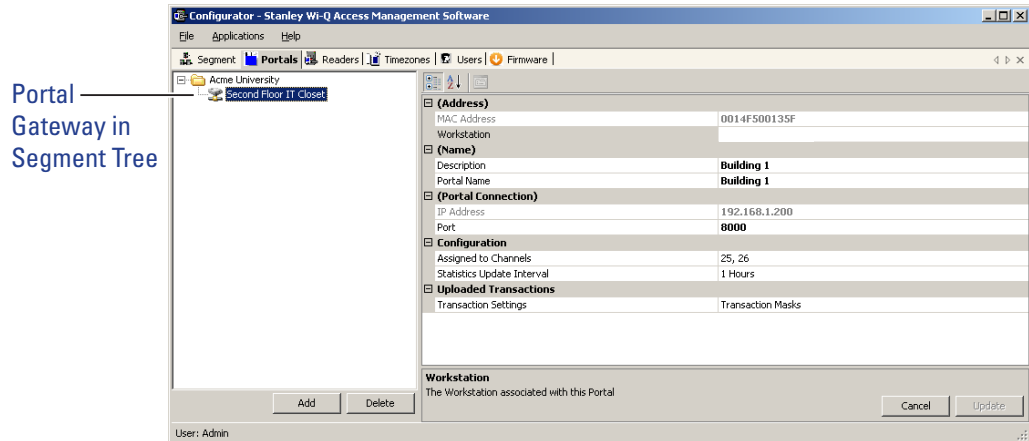
The Portals you have added will now be visible in the Segment Tree. See “Viewing the Segment Tree”. You may now check the operational status of your Portal Gateways. See “Portal Gateway Operational Status” on page 74.

Viewing the Segment Tree

The Segment Tree is a visual representation of the locations and associations of the Portal Gateways, associated Controllers and I/O devices in your segment. As you configure your Portal Gateways, sign on Controllers and configure additional hardware in your system, you can drag them to the folders and subfolders you create in the Segment Tree.

Figure 53 shows an example Portal Gateway in the Segment Tree.

Figure 53 Portal Gateway visible in Segment Tree



To view the Segment Tree

- 1 In the Segment tab, select the segment you wish to work with.
- 2 Click on the Portals tab. The Segment Tree pane displays on the left, and a list of all prepared devices displays on the right. The first item in the Segment Tree is the folder for the selected segment, in this case, Acme University.

The Segment Tree is also viewable from within the Readers tab. See “Adding Controllers to the Segment Tree” on page 89.

Organizing your Segment Tree

You can organize your Segment Tree by Portals and Controllers, or by building locations, or by any other method you prefer. Remember, the Segment Tree is provided as a visual aid and does not affect the actual hardware or communication to the devices.

The first level below the Segment level in the tree might contain, for example, folders for Portals and Controllers, or folders for building locations. You can create sub-items in each folder as needed, for example: First Floor, Second Floor, offices, laboratories, and so on. There is no specific protocol for creating the hierarchy; only that it makes sense to your operation so that when you add other elements to

the system, you can easily locate the Controllers to be assigned. Once you create Segment folders of your own, you can move your Portals to the appropriate folders.

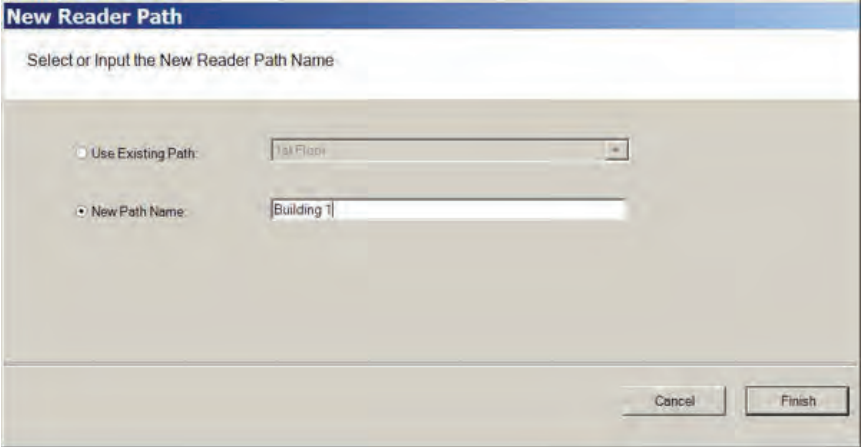
Note To delete a folder, you must already have moved any devices in that folder to a different location.

To create a new segment item folder

- 1 Right click on the parent folder and select New Path from the drop down list. The New Reader Path dialog box opens.

Figure 54 Defining a New Reader Path

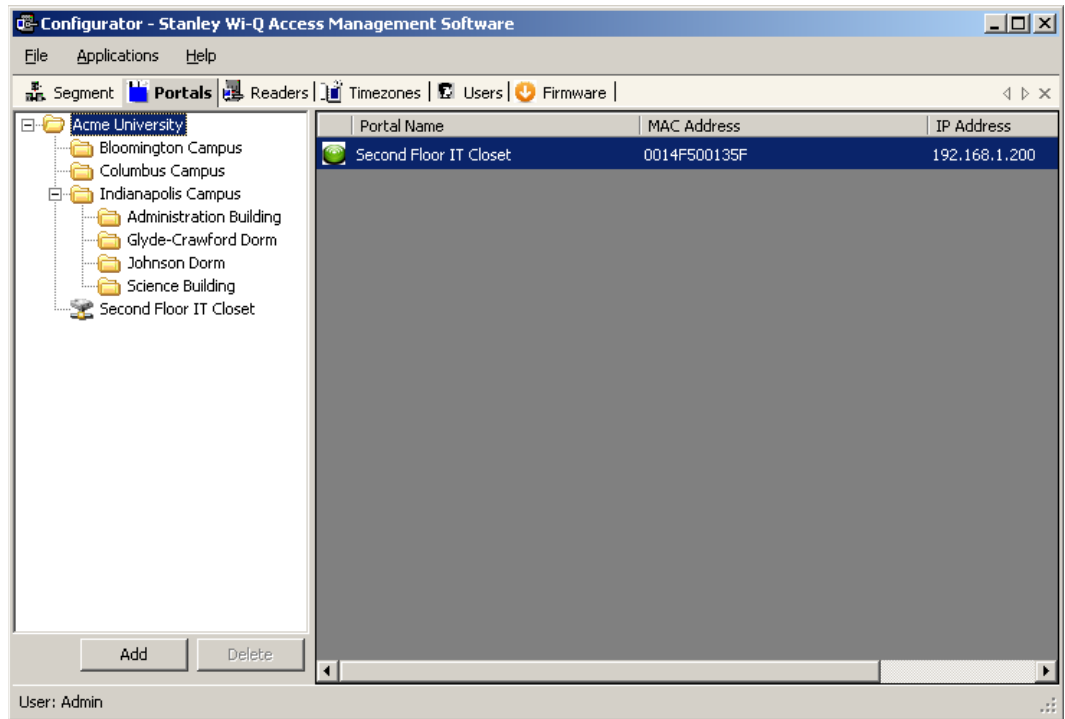
Select New Path Name and enter a name



The image shows a dialog box titled "New Reader Path". Inside the dialog, there is a label "Select or Input the New Reader Path Name". Below this label, there are two radio buttons. The first radio button is labeled "Use Existing Path:" and is currently unselected. To its right is a dropdown menu showing "1st Floor". The second radio button is labeled "New Path Name:" and is currently selected. To its right is a text input field containing the text "Building 1". At the bottom right of the dialog box, there are two buttons: "Cancel" and "Finish".

- 2 Select New Path Name and enter the name.
- 3 Select Finish. The new path folder is added to the Segment Tree. Repeat the process to create the folders needed to define your Segment Tree. Figure 55 shows a Segment Tree with several added folders and sub-folders.

Figure 55 Folders and Sub-Folders in the Segment Tree



Moving Portal Gateways within the Segment Tree

Once you have created the Segment Tree with folders and sub-folders, you can move Portal Gateways into the appropriate folders.

Click on the Portals tab. Select the desired Portal Gateway from within the Segment Tree and drag it to the desired folder.

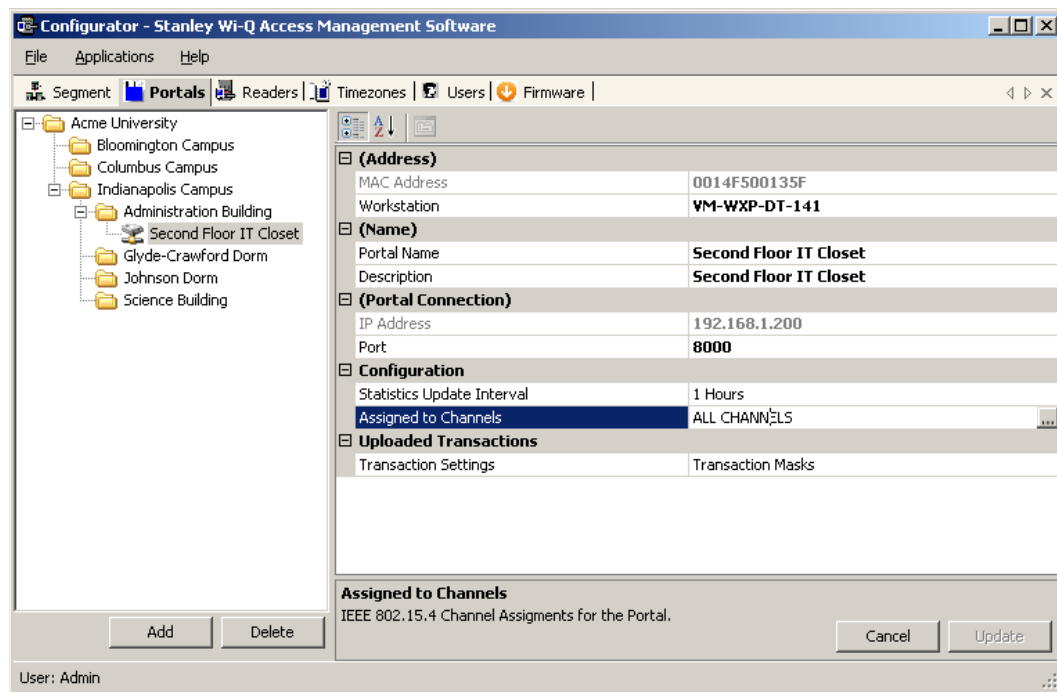
Assign Portal Channels

Portal Gateways default to All Channels; however, you can assign specific channels if needed. For example, if you have configured a new wireless component to operate on channel 17, you will want to disable channel 17 in the Portal channel configuration.

To assign Portal channels

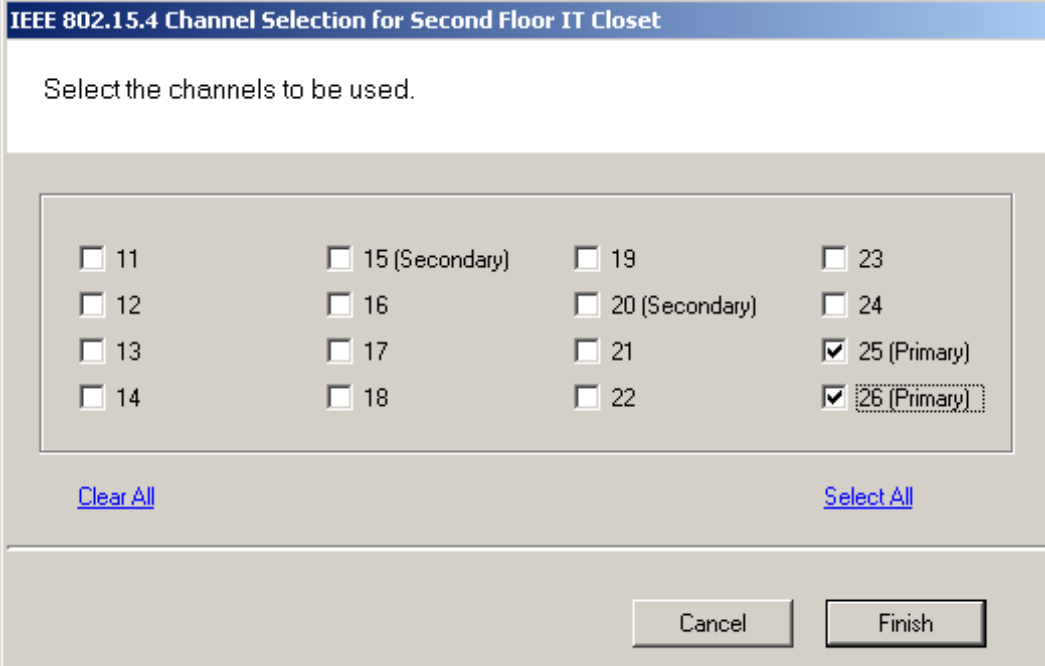
- 1 Click on the Portal tab, and select the desired Portal from the Segment Tree. Clicking on a Portal will display Portal properties on the left.

Figure 56 Portal Properties



- 2 Under the Configuration category, click in the Assigned to Channels field. The ellipsis button appears at the far right of the field. Click the ellipsis button to open the Channel Selection window.

Figure 57 Portal Channel Selection



The dialog box is titled "IEEE 802.15.4 Channel Selection for Second Floor IT Closet". It contains a text label "Select the channels to be used." followed by a grid of 16 checkboxes arranged in 4 rows and 4 columns. The channels are: 11, 12, 13, 14, 15 (Secondary), 16, 17, 18, 19, 20 (Secondary), 21, 22, 23, 24, 25 (Primary), and 26 (Primary). Channels 25 and 26 are checked. Below the grid are two blue underlined links: "Clear All" and "Select All". At the bottom right are two buttons: "Cancel" and "Finish".

Channel	Selected
11	☐
12	☐
13	☐
14	☐
15 (Secondary)	☐
16	☐
17	☐
18	☐
19	☐
20 (Secondary)	☐
21	☐
22	☐
23	☐
24	☐
25 (Primary)	☒
26 (Primary)	☒

[Clear All](#) [Select All](#)

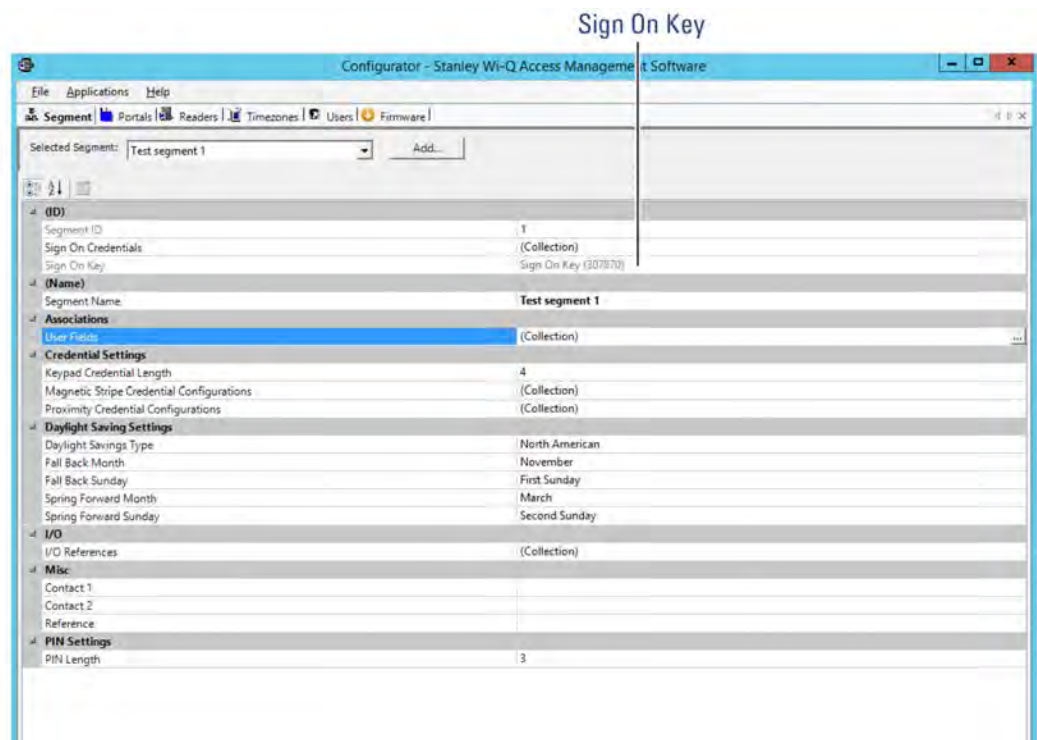
Cancel Finish

- 3 Enable or disable channels as needed (at least one channel must be selected).
- 4 Click Finish to save your settings.

Sign on and Configure Controllers (Task 10)

Each segment created in AMS is assigned a discrete Sign On Key number. Select a segment and you will find this number in the ID Category of the Configurator module's Segment Tab.

Figure 58 Signing on readers from the Segment tab



If your segment uses Controllers with keypads, you must enter this number at each Controller to establish connection between the Controllers and the Portals, and ultimately to a segment in the software. If you use card readers, you can create a sign-on card to use at each reader. Either way, you must sign on each Controller in the system to register them in the database and ultimately establish communication with the software.

Note Readers associated with Single Door Controllers are configured, signed on, and monitored in AMS exactly like any other networked keypad Controller in the system.

Signing on Keypad Controllers

If your segment uses keypad Controllers, use the following steps, in sequence, to register each Controller in the system. Once this is done, the readers will appear in the <New Segment Items> folder, viewable in the Readers tab Segment Tree.

Note The following sequence is timed. Be sure to have your segment sign on key ready to enter at the appropriate time.

- 1 At a keypad Controller, press the following number sequence on the keypad: 5678# (Wi-Q) or 5678 (Omnilock and WAC). The green light will flash three times.
- 2 Within five or six seconds, begin to enter the six-digit segment sign on key number, followed by #. You will have about five seconds to enter each number. The sequence will time out if more than five seconds elapses between numbers.
- 3 Once the key number is completed, the reader begins to alternately flash green and red to signify that it is searching for Portal Gateways in range. If the sequence was completed successfully, three green flashes indicate the Controller has accepted the sign on key.
- 4 If you see three red flashes, the Controller has not accepted the number or you have exceeded the time limit. Begin again at step two, and continue until you receive three green flashes.

Note Once a Controller has been signed on, all sign-on functionality is disabled unless it is deep-reset.

Signing on Card Readers

If your segment uses card readers, you may want to register one of your cards with a segment credential number. This card will be used to sign on card readers to the system. You can register a separate card and hold it specifically for this purpose, or register one that belongs to a user such as the Administrator's card. Once this is done, you will use the card to sign on each reader in the system.

To register a card with a segment credential

- 1 In the Configurator's Segment tab, select the segment to which the readers belong.
- 2 In the ID Category, click in the Sign On Credentials field and select the ellipsis button at the far right of the field. The Segment Credentials Setup property sheet opens.

Figure 59 Segment Credentials Setup

Segment (Acme University) Credentials Setup

Add, Delete, and Modify Segment Credentials

Proximity Card

(ID)

Credential ID

2

Credential Type

Proximity Card

(Name)

Credential Name

Proximity Card

Credentiaal

Issue Number

0

Number

00000000000000003456

Proximity Card

Enforce Expiration Date

False

Hot Stamp Number

Proximity Card Type

Prox 26-Bit Card

Credential ID

The User Credential's ID Number.

Add

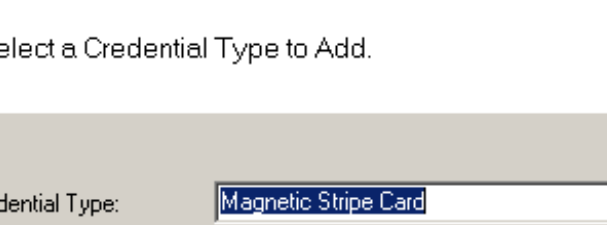
Delete

Update

OK

- 3 Select the type of card you will use. If your card type is not listed, select Add. The Add Credential to Segment dialog box opens.

Figure 60 Add Credential to Segment



Add Credential to Segment (Acme University)

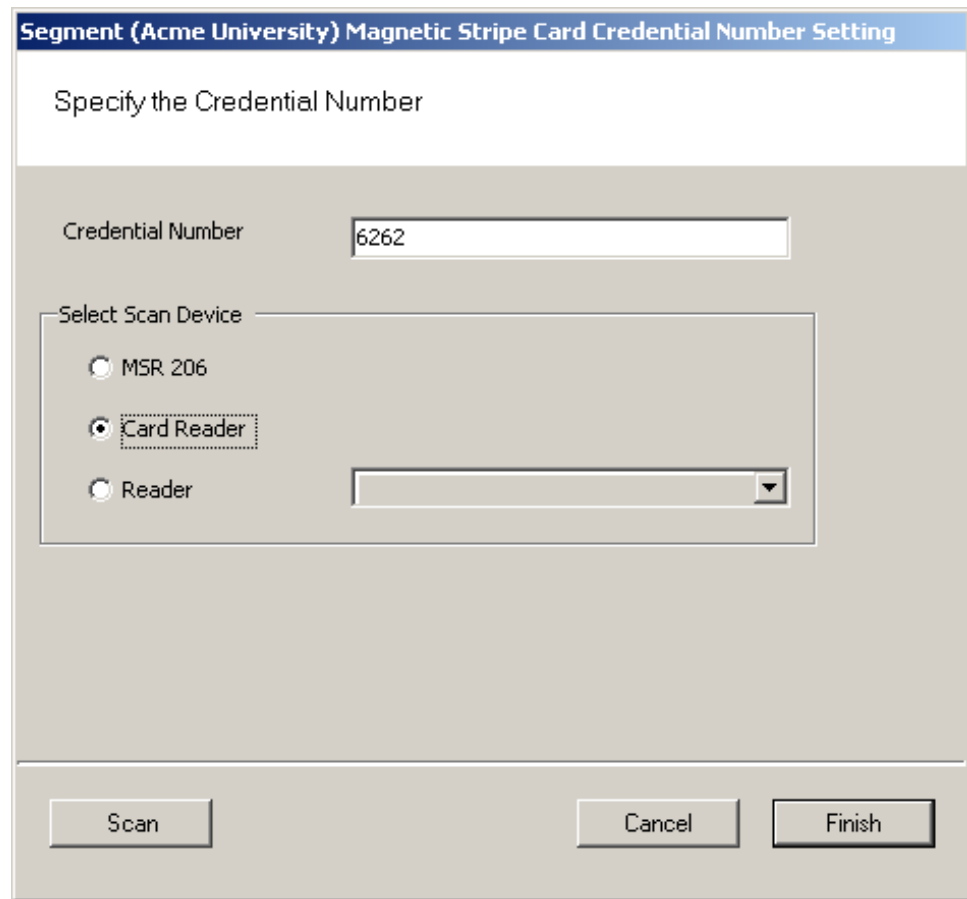
Select a Credential Type to Add.

Credential Type: Magnetic Stripe Card

Cancel Finish

- 4 Select the card type from the drop-down list, in this case, Magnetic Card. The Segment (Magnetic) Card Credential Number Setting dialog box opens.

Figure 61 MAG Card Settings



The dialog box is titled "Segment (Acme University) Magnetic Stripe Card Credential Number Setting". It contains a text input field for "Credential Number" with the value "6262". Below this is a section titled "Select Scan Device" with three radio button options: "MSR 206", "Card Reader" (which is selected and has a dotted border), and "Reader". To the right of the "Reader" option is a drop-down menu. At the bottom of the dialog are three buttons: "Scan", "Cancel", and "Finish".

- 5 You can enter the card's 16-digit credential number manually; or, you can scan the card at a local scanning wedge, or select a reader where the card will be scanned.

To Scan a card locally, select Card Reader and Select Scan. You will have about 30 seconds from the time you select Scan to actually scan the card through a reader.

To Scan at a reader, select Reader and select the reader from the drop-down list to scan at from the drop-down list, then select Scan. You will have about 30 seconds from the time you select Scan to actually scan the card through a reader (this option is available only if the reader has been signed on).

- 6 Select Finish to save your settings and return to the Segment Credentials Setup dialog box, or Cancel if you decide not to create the number. The number appears in the Credential Number category and the card is now registered. If you will use a Prox card, see the following additional steps to complete registration.

Completing the Credential for a Prox card

- 1 Under the Proximity Card category, Enforce Expiration Date, select True or False, depending on your preference. If you select true, you will need to register a new card when the expiration date occurs. If False, the card will not expire.
- 2 Under Proximity Card Type, select the type of encryption the card uses from the dropdown menu.
- 3 Select Finish. Once this is done, you can use this card to sign on card readers.

To sign on card readers

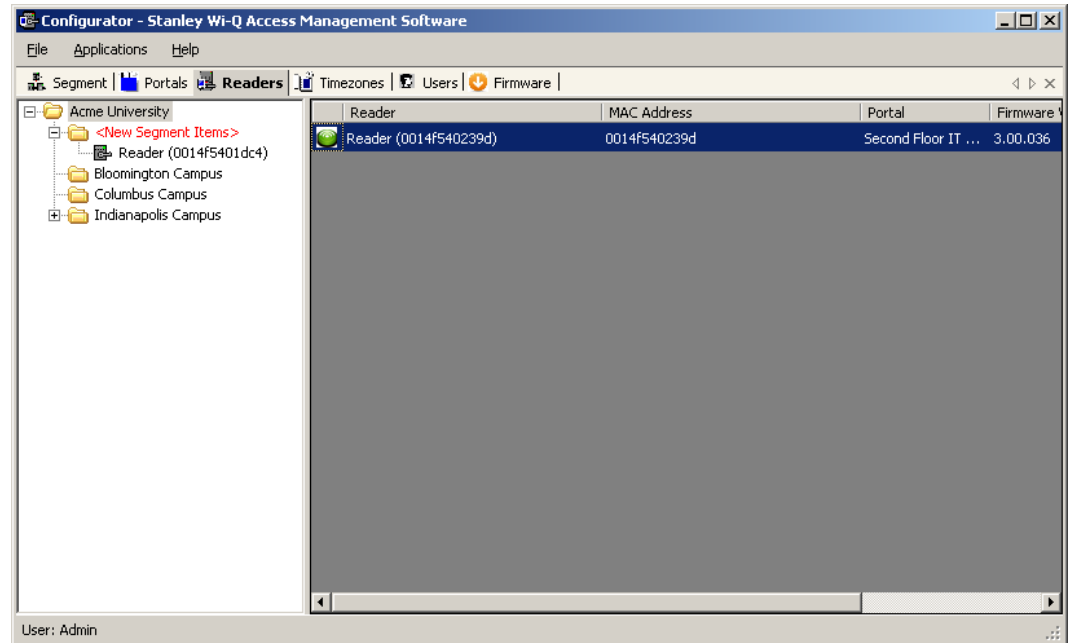
- 1 At each card reader, scan the card you registered with the segment credential.
- 2 Once this is done, the readers will appear in the <New Segment Items> folder, viewable in the Readers tab Segment Tree.

Note Once a reader has been signed on, all sign-on functionality is disabled, that is, removed from the database. If you wish to use the reader in a different capacity, that will require a new sign on. You will need to perform a reset to restore its sign on capability.

Adding Controllers to the Segment Tree

Within 10 to 15 seconds after you sign on a controller, it will appear in the Configurator <New Segment Items> folder, viewable in the Readers tab. The folder will appear in red to indicate that it has received new Controllers. See Figure 62.

Figure 62 <New Segment Items>



You can move new Controllers into sub-folders within the Segment Tree by dragging them to the desired location. When all new Controllers have been assigned to segment folders, the <New Segment Items> folder will be empty and the display color will change from red to black. You can move segment sub-folders to different locations in the tree and the Controllers within will move with them.

If you expand your segment by adding new Controllers, the new Controllers will appear again in the red <New Segment Items> folder so that they can be assigned a location in the Segment Tree.

When you first configure a Controller, you will have the option to configure a new Controller or copy parameters from one that has already been configured.

Copying Reader Parameters

The Copy Reader Parameters feature is useful when you have more than one reader that serves the same users and user groups or will be assigned a special Timezone Group. This feature is available when you first bring a Controller from the <New Segment Items> folder to the Segment Tree, and as a right-mouse-click copy function. It makes sense then that if you are going to use this feature you will want to configure the Users and User Groups before configuring the readers. See “User Groups” on page 103 and “Adding Users to the Segment” on page 121 for steps to create these parameters.

Configuring New Controllers

When you create a new Controller, its name is displayed in the Reader Properties section on the right, and it is automatically assigned to the Master Timezone. Users, User Groups, and Timezone Groups will be available to the Controllers only if they have already been configured. If not, you can configure the Controllers first with default parameters and return to assign Users, User Groups and any Timezone Groups after they are created.

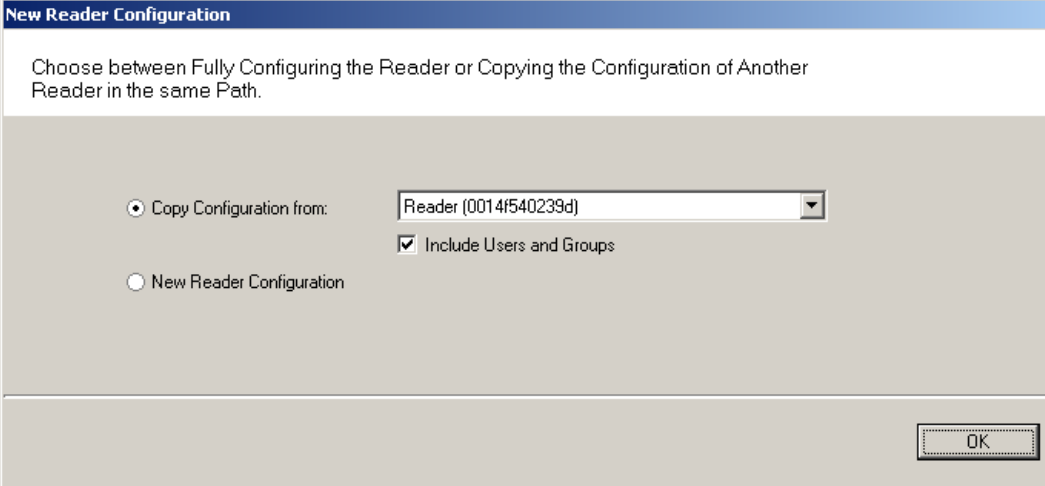
To configure a new Controller

- 1 Drag your Controller out of the <New Segment Items> folder and into your desired sub-folder in the Segment Tree.
- 2 If you are configuring your first controller, select the Controller within the tree, and the Reader Properties sheet will show on the right.

If you have signed on more than one Controller into your segment, a window will open to ask if you would like to copy a configuration from another reader or create a new configuration. See Figure 63.

If you select Copy Configuration from, you can choose a reader in the drop-down list from which to copy configuration settings.

Figure 63 New Reader Configuration

The image shows a 'New Reader Configuration' dialog box. At the top, it says 'Choose between Fully Configuring the Reader or Copying the Configuration of Another Reader in the same Path.' Below this, there are two radio buttons. The first is 'Copy Configuration from:' which is selected, and it has a dropdown menu showing 'Reader (0014f540239d)'. The second radio button is 'New Reader Configuration'. To the right of the first radio button, there is a checked checkbox labeled 'Include Users and Groups'. At the bottom right, there is an 'OK' button.

When you have made your selection, click OK. If you are copying reader properties, a window will open asking if you would like to proceed. Click Yes to proceed.

Field Category Definitions

The following is a list of Reader property field categories and their functions.

Reader Name

The Reader name displays automatically. You may change it by typing over the default name.

Associations

If you have already configured User Groups and Users, you can assign them to the readers now. If you have not yet configured these parameters, or don't wish to do it now, you can come back later to add these settings.

Configuration

Under the Configuration category, you can configure various reader settings, such as default settings for Channels, Beacon Time, Operate and Shunt times, and add delays depending on how the reader will be used.

Assigned to Channels — New readers default to All Channels; however, you can assign specific channels if needed. For example, if an existing wireless component operates on Channel 17, you will want to disable Channel 17 in the reader channel configuration. See "Assigning Reader Channels".

Beacon Time — The default Beacon Time for a reader is one minute; however, you can manually input a different value anywhere from 10 seconds to 1 day. Keep in mind, the more frequent the beacon time, the more battery power used.

Note For best results, it is recommended that beacon time be set to no lower than 1 minute.

Default Operate Time — The Default Operate time is three seconds. You can manually enter a different value as needed.

Default Shunt Time — The Default Shunt Time is three seconds. You can manually enter a different value as needed. This feature is useful for readers that will be used to accommodate wheelchairs or other equipment that may need additional time to get through the door before the alarm is triggered.

Operate Delay — This feature is useful during situations where, for example, a guard may want a chance to visually confirm the identity of the user before access is granted.

Shunt Delay — This feature is useful when the users accessing this reader typically need more time to pass through the door after it unlocks; such as, someone in a wheelchair or someone who will move equipment through the doorway.

Statistics Update Interval — Manually enter the desired reader polling time.

Wiegand Device — Define if applicable.

First Card Unlock Authority — The reader requires authority to leave the door unlocked when in an 'unlock with ID' access mode.

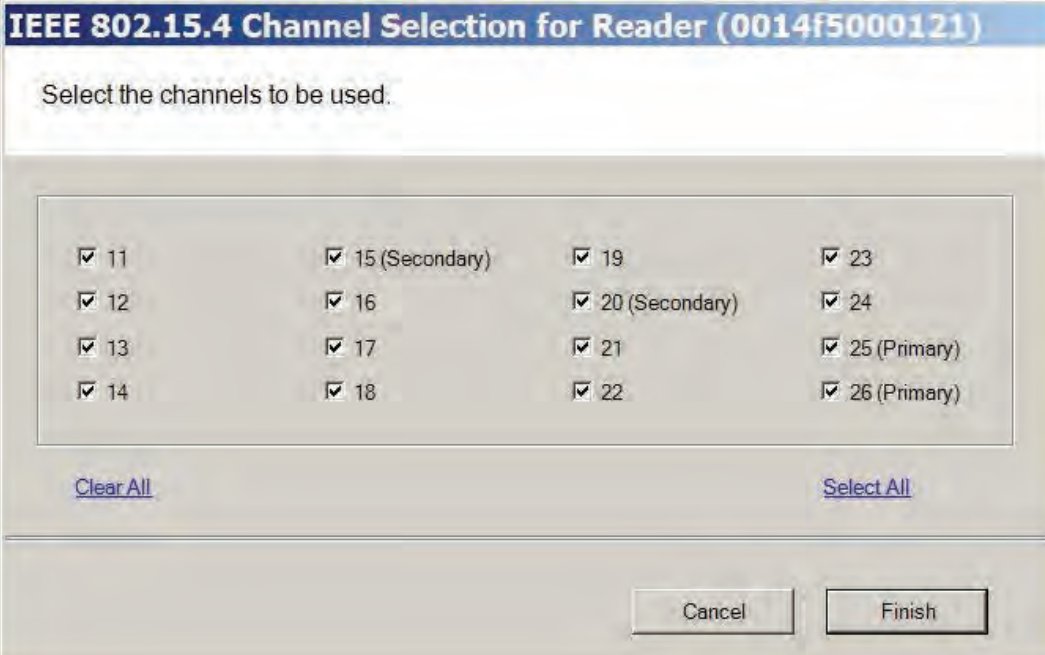
Card Formats Assignments — Assign card formats to the reader.

Assigning Reader Channels

Perform the following steps to assign reader channels.

- 1 In the Reader tab, select the desired reader within the Segment Tree.
- 2 In the Reader Properties sheet, under the Configuration category, click in the Assigned to Channels field. The ellipsis button appears at the far right of the field.
- 3 Click the ellipsis button to display the Channel Selection for the Reader.

Figure 64 Reader Channel Selection



The dialog box is titled "IEEE 802.15.4 Channel Selection for Reader (0014f5000121)". It contains a text field with the placeholder "Select the channels to be used." Below this is a grid of 16 checkboxes, each with a channel number. Channels 11, 12, 13, 14, 15 (Secondary), 16, 17, 18, 19, 20 (Secondary), 21, 22, 23, 24, 25 (Primary), and 26 (Primary) are all checked. At the bottom left is a "Clear All" link, and at the bottom right is a "Select All" link. At the very bottom are "Cancel" and "Finish" buttons.

Channel	Selected
11	✓
12	✓
13	✓
14	✓
15 (Secondary)	✓
16	✓
17	✓
18	✓
19	✓
20 (Secondary)	✓
21	✓
22	✓
23	✓
24	✓
25 (Primary)	✓
26 (Primary)	✓

4 Select your desired channels.

5 Click Finish to save your settings.

Note When changing a reader's channels, ensure that it can connect to a Portal Gateway on the same channel. For example: if a reader is changed to use only Channel 17, the Portal's channels must include Channel 17.

Reader Control

The Reader Control dropdown list corresponds to settings configured under the Reader Control sub tab in the Timezones tab. See "Configuring Timezones" on page 137 for more information.

Uploaded Transactions

Click on the Transaction Masks ellipsis button, the Configure Controller Transactions dialog box will open.

Figure 65 Configure Controller Transactions

Type ID	Transaction Type	Transaction	Priority
0	Alarm Cleared	☒	☐
1	Entry	☒	☒
2	Attempt	☒	☒
3	Set Access Level	☒	☐
4	Low Battery SHUTDOWN	☒	☐
5	Motor Fault	☒	☐
6	Request To Exit	☒	☒
7	Door Open Too Long	☒	☐
8	Door Latch Open	☒	☐
9	Forced Entry	☒	☒
10	Connection Attempt	☒	☐
11	Connected	☒	☐
12	Set Clock	☒	☐

Buttons: Cancel, Select All, Clear All, OK

Here, you can determine what transaction types will show up in the Transactions application. If you make a transaction a priority by checking the Priority checkbox, it will come through immediately instead of waiting until the next beacon. If you click on the Select All or Clear All buttons, a dialog box will open to ask if you want to include Priorities as well. Select Yes or No.

5 Configure AMS Software (Task 11)

This chapter will provide detailed information on configuring the AMS Software.

Now that Portal Gateways and Controllers have been added to and configured within the software, you are ready to configure your segment even further. The first part of this chapter will discuss the configurable items within the different categories of the Segment tab.

Associations

In the Associations category of the Segment tab, you can select from a set of supplied User Fields or add your own and create User Groups for your segment.

User Fields

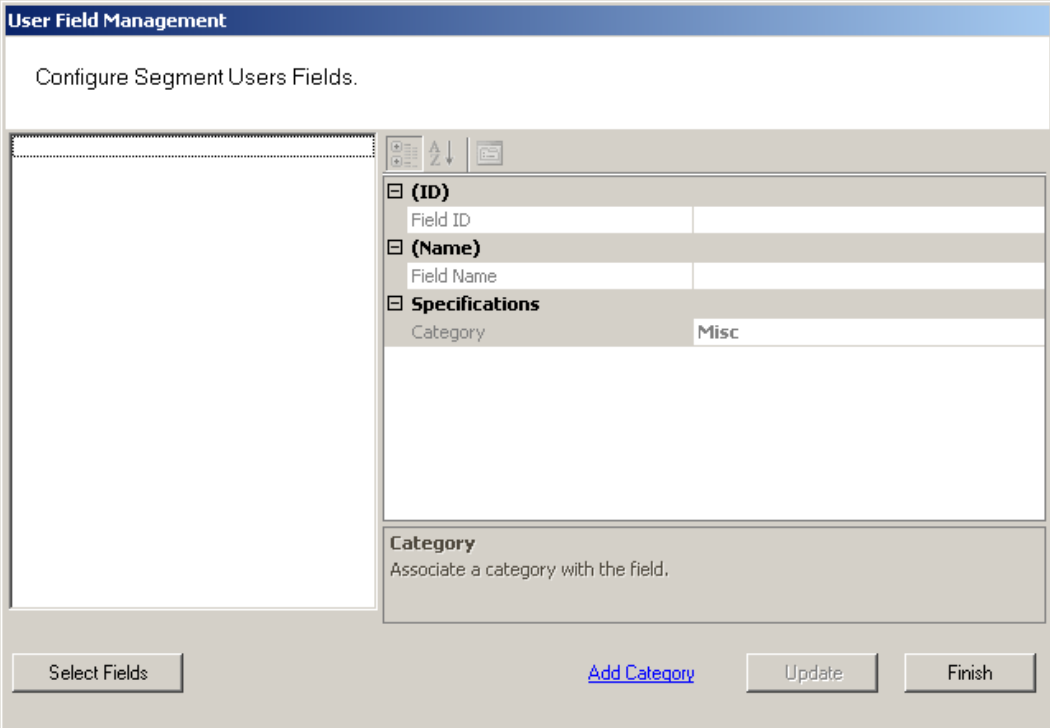
Wi-Q AMS supplies you with a set of common User Fields which are available in the User Tab when you start adding users. You are also supplied with a set of additional User Fields and Categories that you can add to the system if needed. If you do not find the fields and categories you need to fully define your user parameters, you can create your own and they will be available from the User Tab. When you add and remove User Fields, the changes affect all segments in the system.

Adding Additional User Fields

- 1 In the Segment tab, click on User Fields and select the ellipsis button at the far

right of the field. The User Field Management dialog box opens.

Figure 66 User Field Management



The dialog box is titled "User Field Management" and contains the instruction "Configure Segment Users Fields." It features a large empty rectangular area on the left for field selection. On the right, there are three expandable sections: "(ID)" with a "Field ID" input field, "(Name)" with a "Field Name" input field, and "Specifications" with a "Category" dropdown menu currently set to "Misc". Below these sections is a "Category" label with the instruction "Associate a category with the field." At the bottom, there are four buttons: "Select Fields", "Add Category" (a blue hyperlink), "Update", and "Finish".

- 2 Click the Select Fields button at the bottom of the dialog box. The Select Segment User Fields dialog box opens. Additional pre-defined User Fields are listed on the right.

Figure 67 Select Segment User Fields

The dialog box is titled "User Field Management" and contains the instruction "Select Segment User Fields." It is divided into two main sections: "User Fields in Facility" on the left and "User Fields" on the right. The "User Fields in Facility" section has a table with one header "Field Name" and is currently empty. Below it are links for "Clear All" and "Select All". The "User Fields" section has a table with one header "Field Name" and a list of fields: "Telephone Number", "Company Name", "Title", "Address", "City", "State", "Postal Code", "Country", "Contact 1", "Contact 2", and "Reference". The "Telephone Number" field is selected with a checked checkbox. Between the two sections are "Add <<" and "Remove >>" buttons. At the bottom right are links for "Clear All", "Select All", "Add Field", and a "Finish" button.

Field Name

Clear All Select All

Field Name
☒ Telephone Number
☐ Company Name
☐ Title
☐ Address
☐ City
☐ State
☐ Postal Code
☐ Country
☐ Contact 1
☐ Contact 2
☐ Reference

Add << Remove >>

Clear All Select All Add Field Finish

- 3 To add one of these fields, select the checkbox next to the field and select <<Add. The field is transferred to the User Fields in Facility box on the left.

Figure 68 User Fields in Facility

The dialog box is titled "User Field Management" and contains the instruction "Select Segment User Fields." It is divided into two main sections: "User Fields in Facility" on the left and "User Fields" on the right. The "User Fields in Facility" section has a table with one header "Field Name" and one row: "Telephone Number". Below it are links for "Clear All" and "Select All". The "User Fields" section has a table with one header "Field Name" and a list of fields: "Company Name", "Title", "Address", "City", "State", "Postal Code", "Country", "Contact 1", "Contact 2", and "Reference". The "Company Name" field is selected with a checked checkbox. Between the two sections are "Add <<" and "Remove >>" buttons. At the bottom right are links for "Clear All", "Select All", "Add Field", and a "Finish" button.

Field Name
☒ Telephone Number

Clear All Select All

Field Name
☒ Company Name
☐ Title
☐ Address
☐ City
☐ State
☐ Postal Code
☐ Country
☐ Contact 1
☐ Contact 2
☐ Reference

Add << Remove >>

Clear All Select All Add Field Finish

- 4 Select Finish. Once you add the field to a Segment, it will appear on the Users

Tab in the Configurator module. See the next few sections for steps to complete this process.

Creating New User Fields

If the field you wish to add does not appear in the User Fields list on the right, you can add one of your own. Once this is done, you can add it to an existing Category, or create a new Category for the field. You can add any number of new fields and new categories.

Perform the following steps to To create a New User Field.

- 1 In the Select Segment User Fields dialog box, select Add Field at the bottom of the box. The Add, Remove, and Configure System User Fields dialog box opens.

Figure 69 Add, Remove and Configure System User Fields

User Field Management

Add, Remove, and Configure System User Fields.

Address
City
Company Name
Contact 1
Contact 2
Country
Field1
Postal Code
Reference
State
Telephone Number
Title

(ID)
Field ID: 26

(Name)
Field Name: **Alternate Phone Contact**

Specifications
Category: **Statistics**

Field Name
The Field's Name.

Add Remove [Add Category](#) Update Finish

- 2 Under Specifications, Category, select the category under which you wish the new field to appear from the drop down list, for example, Statistics.

Note If the category you want is not available, you can also create your own category. See “Adding a New User Fields Category” on page 101.

- 3 In the Field Name category on the right, type in a new name for the new field.
In the example, we used Alternate Phone Contact.
- 4 Select Update. When you click Finish, the Select Segment User Fields dialog box shows that your new field is now available for selection.

Figure 70 User Field added to list

The screenshot shows the 'User Field Management' dialog box. At the top, it says 'Select Segment User Fields.' Below this, there are two main sections: 'User Fields in Facility' on the left and 'User Fields' on the right. The 'User Fields in Facility' section has a table with one row: 'Telephone Number' with a checked checkbox. The 'User Fields' section has a table with several rows, including 'Alternate Phone Contact' which has a checked checkbox. Between the two sections are 'Add <<' and 'Remove >>' buttons. At the bottom, there are 'Clear All' and 'Select All' links for both sections, an 'Add Field' link, and a 'Finish' button.

User Fields in Facility	
Field Name	
Telephone Number	☒

Add <<

Remove >>

User Fields	
Field Name	
Company Name	☐
Title	☐
Address	☐
City	☐
State	☐
Postal Code	☐
Country	☐
Contact 1	☐
Contact 2	☐
Reference	☐
Alternate Phone Contact	☒

Clear All Select All Add Field Finish

- 5 Select the Checkbox next to the field and click <<Add. The field is transferred to the User Fields in Segment box on the left.
- 6 Select Finish. The new field is now added to the User Field Management dialog box.