

# SOFTWARE DOWNLOAD & INSTALLATION INSTRUCTIONS

ProxessIQ<sup>™</sup> Software

## **Equipment & Network Needs**

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

Here are the Computer & other required system components:

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

Ports to be opened for client and IP controller communications:

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

### Website URLs to be white-listed:

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

#### Email to be white-listed, for Mobile Key& Notifications receipt:

DoNotReply@email.Proxess.com

## **Firewall Settings**

Please prepare/enable your firewall to accept the following.

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

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

## SOFTWARE DOWNLOAD & INSTALLATION

## Which software do I download for a Basic system?

From the links provided at www.Proxess.com/Downloads if your system is described on this page, then on the computer that will be your primary (the "server") you will download and install "Proxess-Server-Installer-LocalDB-Bundle.exe". On all other computers (unlimited), you will only install "Proxess-Installer-Client.msi"

Follow the instructions in this section if this describes your system.

There will be only 1 (one) computer configuration and data entry.

PC SPEC (minimum): Intel Core i5, 2GHz 8MB Cache 8GB RAM 256GB Hard Drive

Primary computer ("Server"): Install "Proxess-Server-Installer-LocalDB-Bundle.exe"

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

> Additional computers ("Clients"): Install "Proxess-Installer-Client.msi"



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

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

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

ProxessIQ <sup>™</sup> Downloads		www.Brovass.com/Downloads
1.5.2.1 Release	vv	ww.FT0Xess.com/Dowmodus
ProxessIQ <sup>TM</sup> Client Installer	ProxessIQ <sup>TM</sup> Client Installer	
Downood: ProcessO meater Circums Server Bundle with LocalDB Downer and Receased Server forstellar LocalDB Bundle are	Download: ProxessIQ Installer Client msi	Note on Upgrading Versions:
Server Only	Server Bundle with LocalDB	When upgrading the version of your
Download: Processic_Installer.Server.mas	Downwad: ProxessIQ Server Installer LocalDB Bundle exe	the server as well as all the clients to the
Previous Releases	Server Only	same version, or there could be functions
ProxessIQ <sup>™</sup> Client Installer	Download: ProxessIQ.Installer.Server.msi	that do not operate properly.
Download: <u>ProcessIQ Installer Client mai</u> Server Bundle with LocaIDB		
Download: ProzessIQ Server Installer LocalDBJ undle.exe Server Only		
Download: ProzessIQ Installer Server or		

Note: 1.4 versions are for support of Legacy systems **Only** 

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

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

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

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

Can't scan file for viruses × <sup>1</sup> Transmittant Local® Bundle see (0) 3MB exceeds the maximum file star that Google con sex. That file might have your compare, to only devinited the file you underland the miss. CANCEL	ollow the windows that hat appear on this page omputer's settings, son nay not appear and can	t open and prompts . Depending on your ne of these windows be ignored.	Windows protected your PC Windows Defender SmartScreen prevented an unrecognized. More into	upp from Windows Defender Smarts starting Running this app App: Proxess.Server.J Publisher: Proxess.LLC	eccted your PC increen prevented an unrecognized app from mght put your PC at risk. installer_LocalDB Bundle.exe
What do you want to do with Proxess.Server.Installer.Loca From: doc-0s-44-docs.googleusercontent.com	DB.Bundle.exe	e as Cancel X			
Proxess.Server.Installer.LocaIDB.Bundle.exe is not common and could harm your device.	ly downloaded Delete Run	View downloads X		Don't run	Run anyway Don't run
User Account Control Do you want to allow this app to make changes to your device?	The icon below may blink in	ProxessIQ Bundle Setup ProxessIQ Bundle	- □ X	ProxessiQ Bundle Setup	- • ×
Proxess ACS Server (LocalDB Bundle) Verified publisher: Proxess LLC	taskbar. If so, click on it to	Proxess® End User License Ag	greement	Proxess End User License	® Agreement
File origin: Hard drive on this computer Show more details No No	proceed.	THE TERMS OF THIS END USEF	R LICENSE AGREEMENT OF ANY PROXESS® * the license terms and conditions	THE TERMS OF THIS END USI	ER LICENSE AGREEMENT F OF ANY PROXESS® * e to the license terms and conditions forstall close



## This is the Server Installation installation wizard:



Click "New Install". Only click "Existing Install" if you are upgrading the current version of your system. Check the box to Use LocalDB and do not change the path that appears. Only set a different path if you have already installed SQL Express and will take responsibility for its maintenance.



## **Initializing the Server**



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

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

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

PROXESSIQ <sup>™</sup> CONTROL CENTER		_ = ×
Server Status	Server Status	
Server Settings	Start Proxess Service Stop Proxess Service	
Self-Signed Certificates	Server Status: Running	]
Identity Server Config	Server Version: 1.5	
Service Configuration	Client Configuration	
Certificate Bindings	Get Client Configuration File	port
Active Directory Config		
Web API Config	Backup Utilities	
	Create Local Database Backup Backup Server Config	
	Logs	
	View Server Logs Export Server Logs	
	Additional Details	
	Server Location: C:\Program Files (x86)\Proxess\Server\	
	Database Server: (LocalDb)\MSSQLLocalDB	
	Database Name: ProxessIQ	

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

ROXESSIQ™ CONTROL CENTER		- • ×
Server Status	Server Status	
Server Settings Self-Signed Certificates dentity Server Config	Start Proxess Service     Server Statu     Running     Server Version:     1.5.2.101	
Service Configuration	Client Configuration	
Certificate Bindings Active Directory Config	Get Client Configuration File	
Veb API Config	Backup Utilities	
	Create Local Database Backup Backup Server Config	
	Logs	
	View Server Logs Export Server Logs	
	Additional Details	
	Server Location: C:\Program Files (x86)\Proxess\Server\ Database Server: (LocalDb)\MSSQLLocalDB	
	Database Name: ProxessIQ	

No

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



Click on the "x" on the top right of the ProxessIQ<sup>™</sup> Control Center window to close the application.

Create Local Database Backu Additional Detail CAProgram Files (v86)/Prove

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Cancel

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



### Initializing the Client

<ul> <li>Recently added</li> <li>ProxessIQ</li> <li>ProxessIQ Control Center</li> <li>Type here to search</li> </ul>	Life at a glance Tuesday	Uss D. uu du C: VN \ V Fil Fil St	er Account Centrol o you want to allow this app from an nknown publisher to make changes to evice? \Users\robsc\AppData\Local\Packages Microsoft.MicrosoftEdge_8wekyb3d8bbwe fempState\Downloads Proxess.Installer.Client.msi ublisher: Unknown le origin: Hard drive on this computer now more details	× p your	
Click the "Windows" icon on your compo program and allow the app to make cha	Iter and select the "ProxessIQ" nges to your device.	v Client Home Shar	Yes No		- • ×
Institution     Image: Configuration       Institution     Image: Configuration       Institution     Image: Configuration       Institution     Image: Configuration	<ul> <li>↓</li> <li>↓</li></ul>	Pictures Pictures Pictures Pictures Pictures Pictures Pictures Proxess Proxess Proxess Proxess Proxess Proxess Proxess Proxess Destrop Documents Destrop Documents Downloads Music Pictures Pict	Instruct or windows (C3 >> Program Hiles (386) >> Prozess >> Name Ib St6 App.config.install Proxess.AvessIQ.Client Proxess.AvessIQ.Client.exe Proxess.AvessIQ.Client.exe Proxess.AvessIQ.Client.exe Proxess.AvessIQ.CloudClient.exe Proxess.AvessIQ.Exe Proxess.	Cuent         O           Date modified         12/2/2018 7:30 AM           1/2/2/2018 7:30 AM         1/2/3/2018 7:30 AM           1/2/3/2018 7:30 AM         1/2/3/2017 7:30 AM           1/2/3/2017 7:30 AM         1/2/3/2017 7:05 PM           1/2/3/2017 7:05 PM         1/2/3/2017 7:12 PM           1/2/2/2017 8:22 PM         1/2/2/2017 1:20 PM	search Litent Type File folder File folder File folder File folder NINSTAL File Application CONNG File CONNG File CONNG File CONNG File CONNG File Security Certificate

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

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

<ul> <li>Proxess Access Control System</li> </ul>		Proxess Access Control System	≡∣♠∣\$ ⊡ \$ -
Load Client Configura	tion		
Host	DESKTOP-QU7CBG		
IdentityAuthorityUrl:	https://DESKTOP-QU7CBGI:9008/core		
Identity Client Secret:	DyLzzdK_E%3k1%ioC*QqTVu		
Service Secure Port:			
Service Unsecure Port:		Proxess Log In	
Bandd Encoded 1500 Bool Carliford	E	Uuentume Pueseed Defaults: User Name: ac Password: pro	dministrator xess

You will now be prompted to change your password, which is strongly recommended, but not required.

One option is to get familiar with the software and configure it and get a second administrator trained before changing the default password.

Please do not take either of these options lightly and be certain to **SAVE YOUR PASSWORD** !! The ProxessIQ<sup>™</sup> software will now open.

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Set Password		Doors	Users	Coor Groups	Credentials	Calendars	<b>Č</b> , Time Schedules	Access Profiles	
The password you are using is not secure. To ensure the security of your system please change your password now:           Password:		Controllers	System Operator	System Operator Roles	<b>ب</b> Mobile Devices	Settings	Logs	<b>Mobile</b> Credentials	
Set Password Ignore and change later		Notifications	Cloud Settings						
		Ready Operator: Administ	ration						~

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

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

## **Assuring Software Clients Connect to the Server**

#### **Resolving Local Host Names**

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

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

123.456.0.1 myserversname

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

#### **NAT/Port Forwarding**

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

Example documentation for setting up port forwarding on a Comcast gateway can be found here: https://www.xfinity.com/support/articles/port-forwarding-xfinity-wireless-gateway

## **Assuring Software Clients Connect to the Server**

#### When the Computer Host Name Changes

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

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

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

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

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

The following are the separately licensable modules and features. Please see your RSM or contact the Proxess HQ

FEATURE	VALUE
UserModule	unlimited
DoorModule	unlimited
AdvancedDoorFeatures	enabled
OrganizationModule	3
AuditPullSchedules	enabled
DeviceActions	enabled
ExtendedUnlockSchedules	enabled
WebAPI	enabled
RemoteManagement	enabled
Update License Close	

Licensing Information

American School District administrator@proxess.com H

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

LicensPackage\_Customer-ABC\_4-19-24\_344051f8.zip 7 KB

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

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

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

ProxessIQ™							=   🔶   🖸	🕞   - 🛛 🗖	×
Dashboard Acc	ess Admin Rep	orting Cloud							
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Doors	Door Groups	Users	Credentials	Calendars	Time Schedules	Access Profiles	Controllers	System Operator	
System Operator Roles	بعن المعالم الم Mobile Devices	Settings	Logs	Mobile Credentials	Notifications	Cloud Settings			
Ready Operator: Administra	t Error Validating Lice	inte							

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Install the license file using the following instructions.

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



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



#### Click "Licensing"



(In a New Syste	em)	
Licensing Informa	ition	
FEATURE	VALUE	•

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

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File	Home Share	View	Compressed F	older To	ols			
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# Q #	uick access Desktop * Downloads *	Nar	ne PraxessIO Cloud PraxessIQ Licens	^ IToken se.lic		Type Text Doct LIC File	ument	

### Click "Update License" (Updating an Existing System) Licensing Information Admin's HP Laptop rob.schorr@proxess.com

FEATURE	VALUE
UserModule	unlimited
DoorModule	unlimited
AdvancedDoorFeatures	enabled
OrganizationModule	3
AuditPullSchedules	enabled
DeviceActions	enabled
ExtendedUnlockSchedules	enabled
WebAPI	enabled
RemoteManagement	enabled
Update License Close	

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

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

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

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File Home Share V	iew Compressed Fol	der Tools	
Documents Zip_Exe Imports for ProxessIQ	<ul> <li>Pictures</li> <li>Quotes</li> <li>RAS</li> </ul>	Scanned Docur Proxess Word Prezi	ments
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Allow this file to open in Notepad, or a similar program.

ProxessIQ_CloudToken - Notepad	- 0	
<u>File Edit Format View H</u> elp		
Display Name: Company ABC		
Host: https://pmcs.proxess.com		
MC ACS ID: cae43b59-77f9-44da-aac0-633	7796a7ea5	
Token: eKH2ojCC1KUv/Wdy9r2mxjgkH4mb01m	iWPJkTj7Kc94=	

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

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

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From the ProxessIQ dashboard, click on Cloud Settings.

ProxessIQ™	ALL ORGANIZATIONS	•					∃i⊖i- o ×
Dashboard Access Admin Reporting Cloud							
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Users	Doors	Door Groups	Calendars	Credentiais	Time Schedules	Access Profiles	Controllers
	System Operator Roles	ر Mobile Devices	Settings	Logs	<b>Mobile</b> Credentials	Notifications	Organizations
Cloud Settings							

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ProxessIQ <sup>™</sup>	ALLORG	ANIZATIONS			– U X
Window Ac	cess <u>A</u> dmin	Reporting Cloud	d About		
Cloud					
		Cloud Set	ttings		
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		Host			
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		MC ACS Id			
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		Tehen			
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		Status: Sync	chronized		
Operator: Adm	ninistrator				

Check the "Enabled" box.

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

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



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