

## Allegion License Manager User Guide

This step-by-step guide shows how to use the new Allegion License Manager to purchase, assign and use ENGAGE credentials.

### Purchasing Credentials

- Customer submits a PO for credentials.
  - If the PO includes the ENGAGE Site Id of the facility to which the new licenses are to be assigned, Allegion License Manager will send them directly to that facility.
  - If the PO does NOT include an ENGAGE Site Id, the licenses will be added to the customer's Allegion License Manager account.

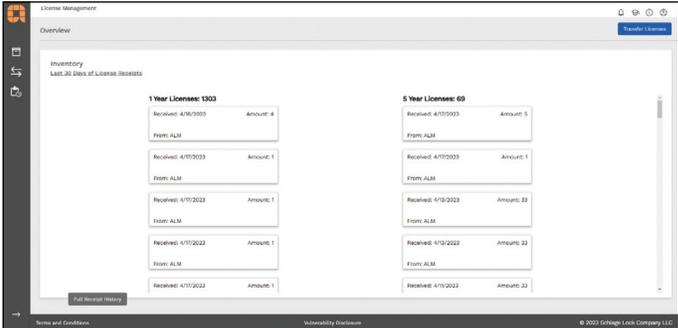
### Accessing Allegion License Manager

- Customers will access Allegion License Manager via the [Allegion 360 Portal](#). If you do not have an account, please contact your Allegion representative.
- Customers will need to add the Allegion License Manager icon to their Allegion 360 Portal homepage. You can do this by clicking on the “+” sign in the page's upper right-hand corner. Then find the ALM badge and click the “heart.” This will add it to your homepage so you can easily access going forward.
- From within Allegion License Manager, the user can transfer their license inventory to other users. You can do this by specifying the email address of the other user, and it will be transferred to that person's ALM account, or you can specify an ENGAGE Site Id and those licenses will show up in that facility's ENGAGE account.

### Viewing Inventory

- Upon logging in, users will be presented with their inventory page. This will show the number of 1-year and 5-year licenses available. In addition to total counts, the page displays the last 30 days of license transfers.

### User Inventory Page



1 Year Licenses: 1303	5 Year Licenses: 60
Received: 4/16/2023 Amount: 4 From: ALM	Received: 4/13/2023 Amount: 5 From: ALM
Received: 4/17/2023 Amount: 1 From: ALM	Received: 4/17/2023 Amount: 1 From: ALM
Received: 4/17/2023 Amount: 1 From: ALM	Received: 4/13/2023 Amount: 23 From: ALM
Received: 4/17/2023 Amount: 1 From: ALM	Received: 4/13/2023 Amount: 22 From: ALM
Received: 4/17/2023 Amount: 1 From: ALM	Received: 4/17/2023 Amount: 23 From: ALM

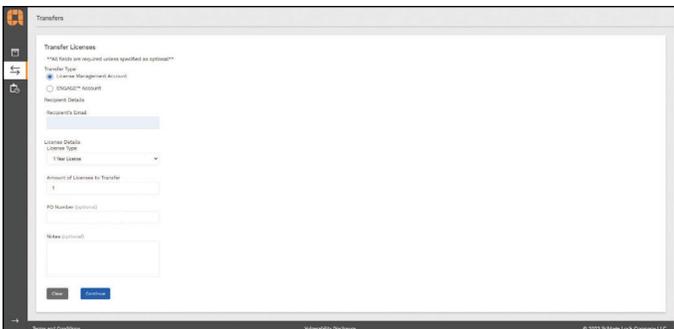
## Transferring Licenses

Click the 'transfer license' link from Allegion License Manager. Users are then presented with a form. If transferring to another user, that user's email address must be entered. If transferring to an ENGAGE site, that site ID must be entered. Allegion License Manager page views are shown below.

### Transfer Main Page



### Transferring a License to a User Page



### Transferring a License to an ENGAGE Site Page

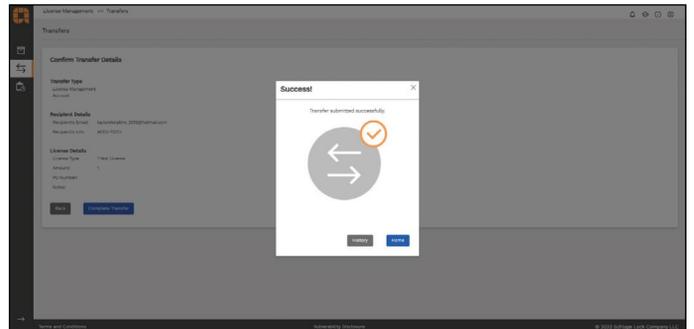


- The user then selects the type of license (1-year Flex or 5-year Fix) to be transferred and the quantity. The user may also enter a PO number.
- Once the form is submitted, the user will see a summary of the transfer and must confirm. Once confirmed, the transfer is initiated.
- Clicking on the History page gives the user a full activity log of license transfers in and out of their account.

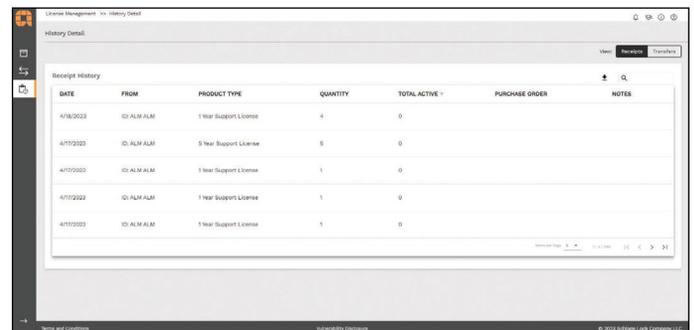
### Transfer Confirmation Screen Page



### Transfer Complete Page



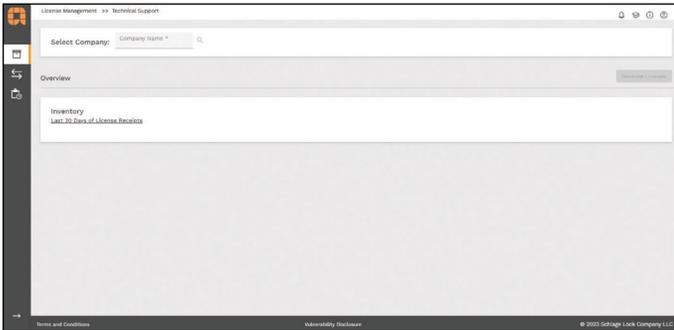
### Transfer History Page



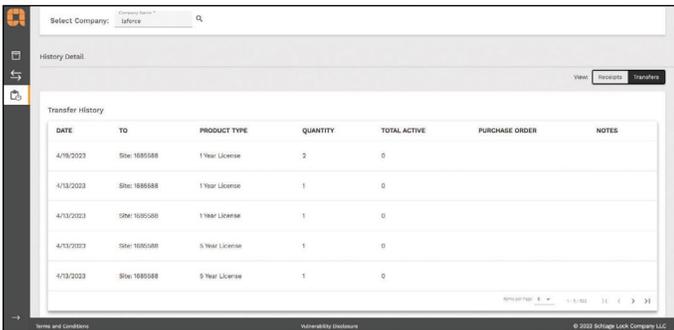
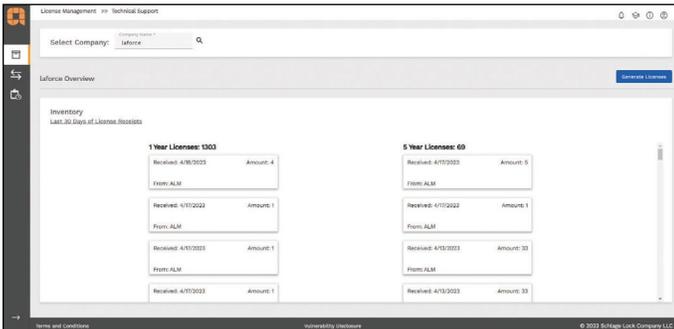
### Using Allegion License Manager – Support Techs

- Support techs will access Allegion License Manager via the Allegion 360 portal. Upon accessing ALM, they will be presented with a form asking them to specify or search for a customer account. Upon selecting a valid customer, the support tech will be taken to that customer’s inventory page. From this point, the support tech can view everything in Allegion License Manager the same way the customer would see it.

### Customer Impersonation Page

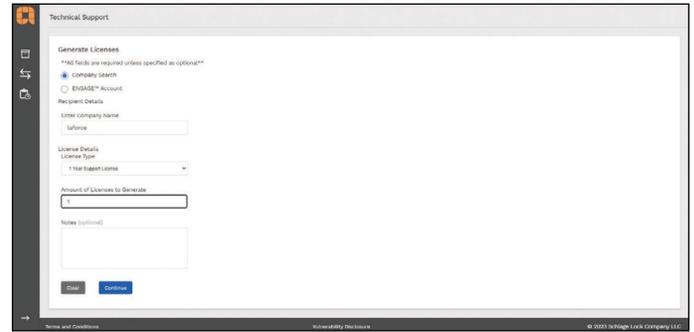


### Customer Impersonation Page - License Inventory

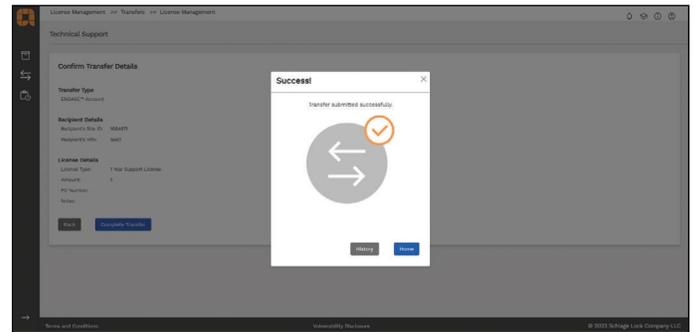


- In addition to the views available to the customer user, the support tech can create and add licenses to a customer’s account. This is intended to be a tool for the support tech to resolve an issue where the customer either improperly used the license accidentally or if there is a technical problem around issuing the credential.

### Generate a License Page



### License Generated Successfully Confirmation Page



### Additional Allegion License Manager Resources:

- [Allegion License Manager FAQ](#)
- [Introducing Allegion License Manager Video](#)
- [Allegion License Manager \(ALM\) and Assigning Mobile Credential Licenses with ENGAGE Video](#)
- [Allegion License Manager \(ALM\) and Fixed and Flexible Mobile Credentials Video](#)

## Glossary of Terms

**Patron** – The person utilizing a mobile credential to access a lock.

**Direct Customer** – The dealer/wholesaler purchasing mobile credential licenses from Allegion. Not necessarily the end user of the license or the credential.

**Indirect Customer** – Customer that has purchased licenses from a direct customer.

**License** – Represents a pre-purchased period of time for mobile credentials to be active.

**Credential** – The final digital product that grants a patron access to a door/lock.

**1-Year Flexible License** – valid for one year from when the credential is issued. Flex license credentials can be disabled without losing the remaining time on the license. If/when a credential is disabled before its expiration date, the license becomes available again to the facility in ENGAGE. New credentials can be issued using these available licenses. However, it is important to understand that disabling a Flexible credential does not STOP the clock on the original license. It will still expire one year from the date it was first utilized.

**5-Year Fixed Licenses** – valid for five years from when the credential is created. Unlike 1-year licenses, only a single license may be stacked onto a Fix credential to extend its expiration and only in the final month of the existing license's valid period. As with the 1-year Flexible, the clock begins counting when the credential is first issued. The critical difference between Fixed and Flexible credentials is that if a credential with a 5-year license is deactivated, the license is disabled permanently. Its remaining time is lost regardless of how much was left, and the license cannot be applied to another credential.

**“Legacy” Licenses** – Licenses tied to credentials issued through ENGAGE prior to Sept. 5, 2023. Allegion will not charge for these licenses, but as they are disabled or changed over time, they will need to be replaced with paid licenses.

**Stacking Licenses** – admin may “stack” an additional license onto a license, which will extend expiration for another year. Up to three Flexible licenses may be “stacked” onto a credential at a time this way. This means it may be up to three years before the facility admin will need to return to ENGAGE to attach a new license to the patron's credential. 1-year licenses may be stacked this way at any time in the credential's life cycle, but only three (3) may be stacked on a credential at a time.

## Use Cases

1. A facility offers housing to college students. The facility admin issued each patron a **1-year Flexible** mobile credential on January 1, 2023. Their patrons routinely leave the facility during the summer months between semesters. When a patron departs for the

summer, the facility admin logs into ENGAGE and disables their credential. Their flexible license is now listed in ENGAGE as “available” and displays the number of days it has left before expiring. Months later, when the patron returns to school and the housing, the facility admin logs into ENGAGE and re-issues the patron's credential using the existing flexible license. It remains valid through its established expiration date of January 1, 2024.

2. An office building is being renovated. Access needs to be given to the contractors performing the work for the month of March, when the project will take place. The facility admin uses multiple **1-year Flexible** licenses and issues a credential to each worker on March 1. On March 31, the work is done, and the contractors leave. The facility admin logs in and disables their credentials. The licenses that were in use are now shown as available with 11 months left before they expire. The following month, decorators are hired to furnish the space. The facility admin logs in to ENGAGE and uses the licenses previously used by the contractors to assign the decorators credentials to access the building.
3. A building is being offered for rent on the weekends via Airbnb. The facility admin uses three **1-year Flexible** licenses to give the first tenants three credentials to the building. When their weekend ends, the admin disables the credentials, and the licenses go into their available pile. The following weekend, new tenants arrive, and the facility admin repeats the process, issuing three credentials to the new users but utilizing the pre-existing 1-year licenses. After a full year of weekend rentals, the admin has only used three licenses in total.
4. A business hires an employee. The facility admin logs into ENGAGE and uses a **5-year Fixed** license to issue them their mobile credential to access the office. The employee works at the business for two years when they decide to upgrade their phone. The facility admin logs into ENGAGE and disables the existing credential. The credential and its license are canceled permanently. The facility admin then issues a new credential to the new phone with a separate 5-year fixed license.
5. The employee was issued a credential with a **5-year Fixed** license four-plus years ago, and it is due to expire soon. When the credential is within its last 30 days before expiration, the facility admin logs in to ENGAGE and applies an additional 5-year license to the existing credential. This adds five years to the credential expiration date. The employee does not see any interruption in service.