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SCHLAGE

Schlage Express™

Software manual

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This document supports version 4.4.6.

For additional support and advice for Schlage Express, contact technical support.

- Phone: Toll free **877-671-7011** option **2** then **2**
- Web: us.allegion.com
- Email: Electronic_lock_TechProdSupport@allegion.com

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Introduction

Schlage Express is an access control management system that manages electronic access control devices. Schlage Express manages and monitors offline devices. Each device has unique characteristics, which are all accessible through Schlage Express.

Licensing

Schlage Express is a single-user, single-PC license.

If you want multiple users to have access to the software, have your IT group make a “Schlage User” profile with administrative rights to the Schlage folder.

➔ Example: If Schlage Express is installed on a machine when John Smith is logged in, then the software and the HHD folder will be accessible ONLY when John Smith is logged in.

Videos

- Using Schlage Utility Software - hand held programming device: www.youtube.com/watch?v=1dOo8F3keo4
- Programming AD200 or AD201 using Schlage Express: www.youtube.com/watch?v=BSw50gd-lYA

➔ For a complete list of videos go to www.youtube.com and type “**Schlage Utility Software**” in the search window.

Technical Support

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Locking Device Cross-Reference Table

The following table shows the cross-reference between installed Device, the Lock Type required to be specified on doors, and the Programming Device needed to transfer data to the device using UpLink if applicable.

Device	Lock Type	Programming Device
CM 5xxx Series	CM/BE367 Lock	HHD plus CIP
CM 993 Trim Series		
CT Controller Series		
SmartExit bars		
SmartMagnets		
BE367 5xxx Lock		
BE367 9xxx Lock		
BE367 Deadbolt	BE367 Deadbolt	
HandKey II	Handkey II	Ethernet, serial
AD-200 Series	AD-200	HHD
AD-201 Series	AD-201	
CO-200 Series	CO-200	
CT5000	CT500	
CO-220	CO-220	

System Components

Before you start using the Schlage Express Software, take a moment to get to know the components that you will be handling.

AD 200 Series Locks

The AD-200 Series Locks are battery powered offline locks that can use various credentials (PIN, Prox, Smart Cards, Mag stripe, Card + PIN). The AD-200 locks are modular and read different credentials with additional hardware add-ons.

AD 201 Series Locks

The AD-201 Series Locks are battery powered offline locks that support the FIPS 201 PIV credential.

CO-200 Series Locks

The CO-200 Series locks are battery powered offline locks that can use various credentials.

CO-220 Series Locks

The CO-220 Series locks are battery powered offline locks that can use various credentials. It also allows immediate local lockdown by simply pushing the button on the remote fob from anywhere in the classroom. An illuminated visual indicator located on the interior side of the lock provides instant verification that the door is secured. The CO-220 provides a localized solution for schools that want to upgrade without the cost or complexity of a networked system.

CT5000

The CT5000 is an offline single opening controller.

BE367 Deadbolt

The battery-powered BE367 Deadbolt is an electronically programmable deadbolt lock. It is programmed to accept iButtons. When an iButton is presented to the BE367 Deadbolt, the lock reads the electronic signature of the iButton and if the lock has been programmed to accept that signature, the lock will operate.

Legacy KC2 5000 and 9000

The battery-powered King Cobra is an electronically programmable lockset that can store PIN codes and iButtons.

CM993

The CM993 is a computer managed retrofit trim and interfaces with Von Duprin 98 & 99 Series Exit Devices. Models of CM993 are available that will accommodate a variety of credentials, i.e., mag stripe card, HID prox card, iButton and keypad.

CT1000 Controller

The CT1000 Controller is an offline, hardwired, universal controller that supports 1000 users and 1000 audit events The CT1000 supports iButtons, mag stripe cards, PIN codes and HID prox cards.

HHD

Using the HHD you can transfer information to and from the locks without having to return multiple times to the desktop PC. When connected together, the HHD and the desktop PC transfer new or updated programming and audit trail information between each other. Will connect to AD and CO series locks with the included USB cable. Can connect to other locks with the CIP add on. Works with all credentials.

Schlage Express Software

Schlage Express software is an easy-to-use system that provides access control and key management for both multi-family residences and commercial facilities.

Backup Facility Files

Always back up your Schlage Express facility files. Back up the files to diskette, CD, network or flash drive. The backup facility files are a safeguard in case theft, fire, computer virus, or other disaster should strike the desktop PC that houses your database.

User Credentials

User Credentials lets you lock or unlock a variety of locks which have been programmed to accept the credential.

- Red iButtons are for programming.
- Black iButtons are for user access.
- All Legacy KC2 locks will also accept a Black iButton as a programming key. You can only use a Red iButton to program a BE367 Deadbolt.

HH-USB Cable

This cable comes with the HHD. It is used to connect the HHD to a desktop PC and to USB enabled locks (CO and AD series).

HH-SERIAL Cable

This is an additional cable that can be purchased separately from the HHD that connects the HHD to the CIP.

Computer Interface Peripheral (CIP)

The CIP is used to connect to non-USB enabled locks. Use the CIP to transfer data between the non-USB enable lock and the HHD.

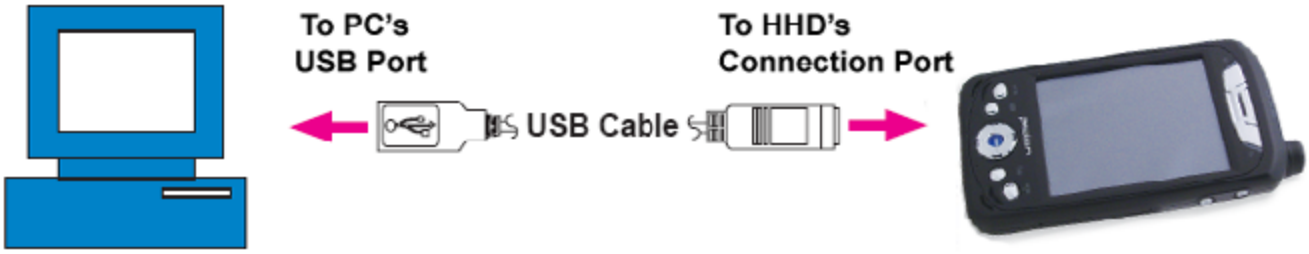
Hardware Connection

➔ Schlage Express is a single-user, single-PC license. You must be logged into the account under which the software was installed to use the software. See Licensing on page 5 for more information.

Prior to making facility changes in Schlage Express or programming a lock, your hardware must be connected properly. Connect hardware as shown below.

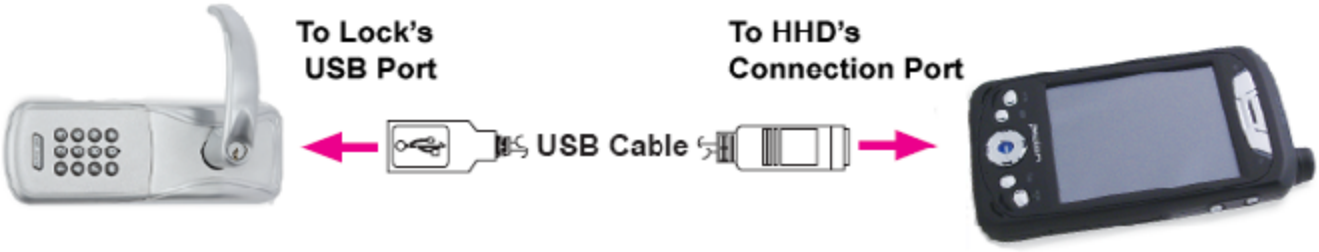
From PC to HHD

Use the standard HHD USB cable (HH-USB) to connect the HHD to the PC.



From HHD to USB enabled Lock (AD, CO or CT series)

Use the standard HHD USB cable (HH-USB) to connect the HHD to USB enabled lock.



From HHD to non-USB enabled Lock

Use the HHD Serial cable (HH-SERIAL) to connect the HHD to the CIP then connect the CIP to the Lock.

➔ NOTE: Regardless of lock model, smaller circle on CIP always plugs into smaller circle on iButton receptacle of lock being programmed.

HHD Setup

Installing Windows Mobile Device Center

➔ Adding Microsoft Mobile Center requires Administration Rights for the PC or laptop on which you are loading it.

Windows Mobile Device Center (WMDC) is the successor to Microsoft Active Sync. WMDC is used with Windows Vista, Windows 7, Windows 8, and Windows 10. Follow the instructions below to install WMDC.

Finding the type of Operating System (OS) you have installed:

You must first know which type of OS you have installed on your computer, the 32-bit type or the 64-bit type.

To find out which type of OS you have installed:

1. On your computer, click the Start button.
2. In the Start Menu, click Control Panel.
3. In the Control Panel window, click System and Maintenance.
4. In the System and Maintenance window, click System.
    a. In the basic system information window that appears, your type of OS is indicated to the right of System type. It will either read, 32-bit Operating System or 64-bit Operating System.
    b. Make note of your OS type. This information will be needed in a later step.

Downloading the WMDC installation file:

You must download the WMDC installation file from the download section of Microsoft's ® website.

To download the WMDC installation file:

1. With your computer connected to the internet, open an internet browser.
2. Type the following into the browser's address bar: microsoft.com/downloads
3. In the list of downloads:

• click on the following link if you have the 32-bit OS: Microsoft Windows Mobile Device Center (32-bit)

or

• click on the following link if you have the 64-bit OS: Microsoft Windows Mobile Device Center (64-bit)

➔ Note: You might have to scroll down the page a little to see the 64-bit download.

4. Click the button labeled: Download.
5. In the File Download block that appears, click Save.
6. In the Save As block that appears, navigate to and click Desktop, then click Save.
7. If the Download Complete block is still open after download is finished, click Close.

Installing the downloaded file:

You must install the downloaded file into your computer system.

To install the downloaded file:

1. On your computer's desktop, double-click the downloaded file.
2. When prompted, click to select one of the following options:
    - Remind me Later
    - Don't Register
    - Register
3. Connect the HHD to your computer.
4. In the Windows Mobile Member Center window, click Set up your device.
5. In the Set Up Windows Mobile Partnership window:
    a. You can either type in a meaningful name in the Device Name block or leave the default name as is. The choice is yours.

b. Click to check the Create a shortcut on the Desktop to Windows Mobile Device Center check box.
c. Click Set Up.
d. When prompted, click to select the Files check box (you might have to scroll down some).
e. Click Next. A WMDC Partnership has now been established.

Finding the synchronization folder:

The following steps will show you where the synchronization folder is located on your computer.

To find the synchronization folder:

1. If the WMDC is not already open, do the following:
   a. Double-click the WMDC icon in the system tray.

   b. In the Synchronization window, double-click the icon labeled, Administrator's PDA. The WMDC window appears.
2. In the WMDC window, under the Mobile Device category:
   a. Click Change content sync settings. The WMDC window displays a list of items that can be changed.
   b. In the list of items, click to check the Files check box (If it isn't already checked).
   c. Under Files, click Sync Settings. The following statement will appear:

   On this computer, synchronize the files in this folder:

   • A path to a synchronization folder is shown under that statement.
3. Make note of the path to the sync. folder. This information will be needed in a later step.

Changing the Path to the Synchronization Folder:

1. In the Schlage Express main menu:
   a. Click Settings.
   b. In the drop-down menu, click Program Settings. A Program Settings window appears.
2. In the Program Settings window:
   a. Click the Programming tab.
   b. Click to select the radio button for Locks will be programmed with a Pocket PC device.
   c. Click the Change Folder button associated with that field. The Select Path window will open.
   d. Navigate to and select the synchronization folder.
   e. Click OK. The selection window will close and the new path appears in the synchronization folder block of the Schlage Express Program Settings window.
   f. Click Save.

Connecting the HHD to the Desktop PC

The HHD is connected to the desktop PC through a usb cable. Whenever you are not using the pocket PC away from the desktop PC, keep it connected to the AC adapter so it will stay fully charged.

1. Plug the HHD AC adapter into a power outlet.
2. Insert the AC adapter plug to the back of the HHD.
3. Attach the HHD's USB cable to the desktop PC.
4. Leave the Pocket PC connected to the power outlet until its battery is fully charged.

➔ Note: Windows 8 does not auto detect HHD. You need to manually launch Windows Mobile Device Center (WMDC) with WIndows 8. Windows XP & Windows 7 auto detects the HHD and launches Active Sync or WMDC automatically.

Installing and Starting Schlage Express

➔ Schlage Express is a single-user, single-PC license. You must be logged into the account under which the software was installed to use the software. See Licensing on page 5 for more information.

Downloading Schlage Express and supporting software and firmware

Use the links below to get the software/firmware you need. You will need all of the listed software/firmware to successfully use Schlage Express.

Schlage Express

https://us.allegion.com/en/home/products/categories/electronic-locks/schlage-express-software.html

AD-Series firmware

Go to us.allegion.com/en/home/products/categories/electronic-locks/schlage-ad-200.html and then click on the **Downloads** tab.

Schlage Utility Software (SUS)

Go to this page to find downloads and notes.

Donwload the files and unzip them on your machine. The, have your IT professionals transfer these files to the ROOT Directory on the Hand Held Device (HHD).

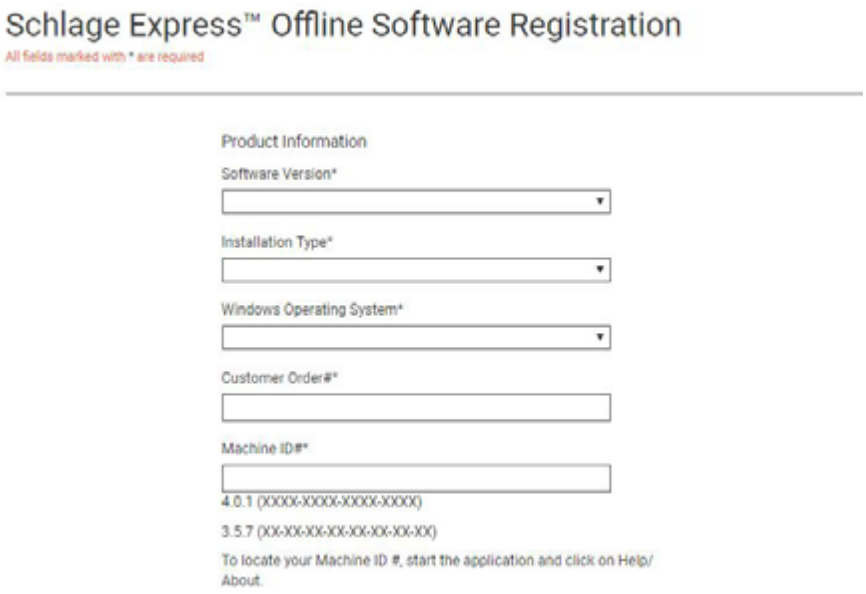
Obtain Schlage Express License

To obtain a license, complete the form located at https://us.allegion.com/en/home/support/register-schlage-express.html.

Before getting started, you will need to have these handy:

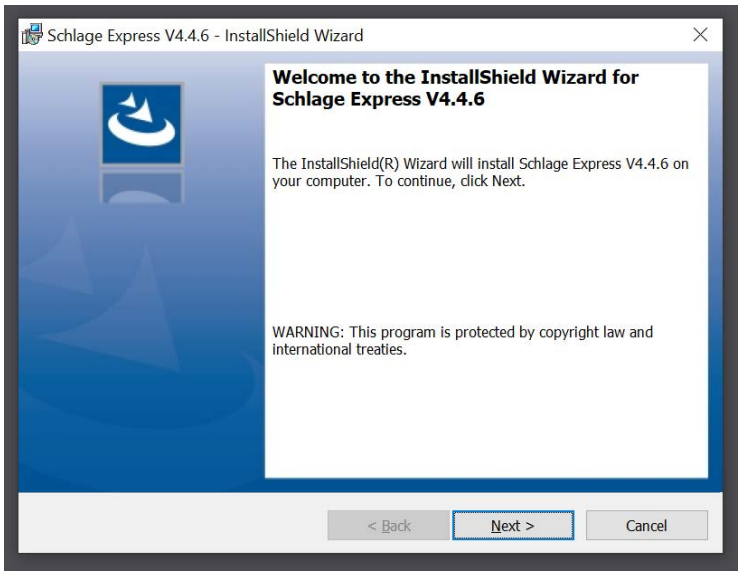
- OS version
- Customer Order Number
- Machine ID.

➔ Schlage Express is a Single User/Single PC license and is not available in a Client/Server version. All authorized users will use the same PC or laptop to manage the locks.

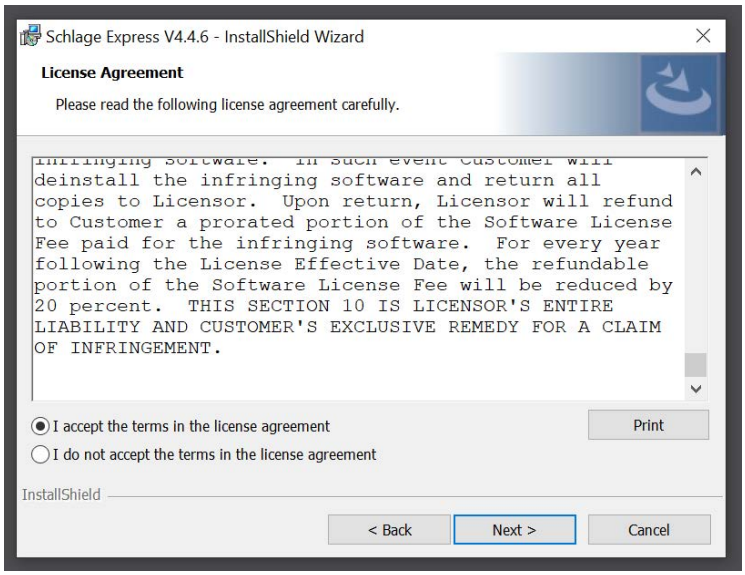


Installing Schlage Express

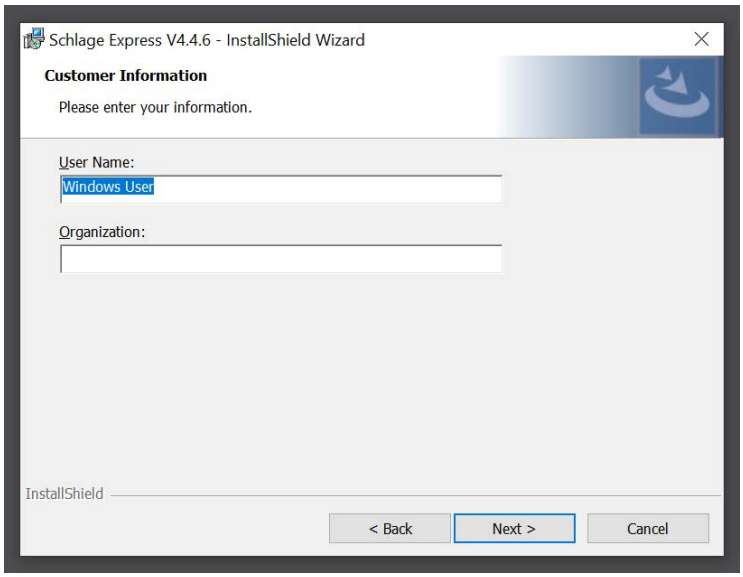
1. Start the installation by either:
   a. If you have the Schlage Express CD, insert it in the CD-ROM drive of your computer. After a few moments, the installation process begins automatically. Follow the prompts on each window.
   b. If you have downloaded the installer, please double click the file you downloaded.
2. The InstallShield Wizard will open to the Welcome screen.
3. Click Next.



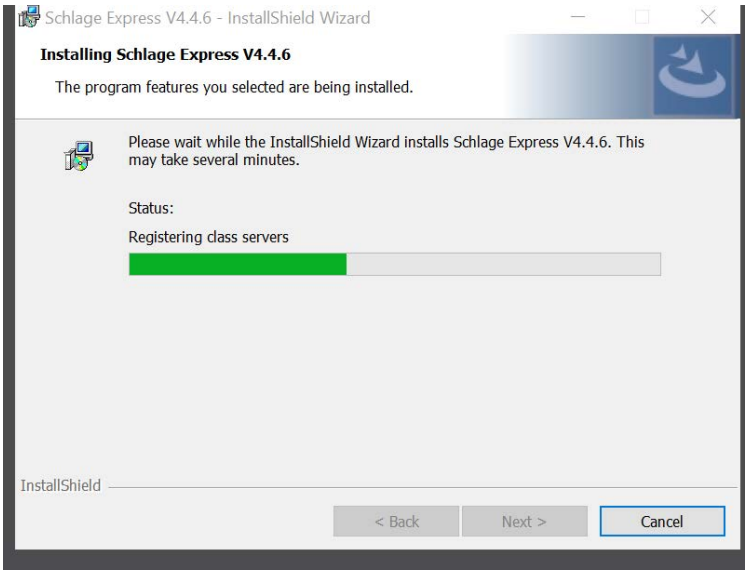
4. Click on the I accept the terms in the license agreement button.
5. Click Next.

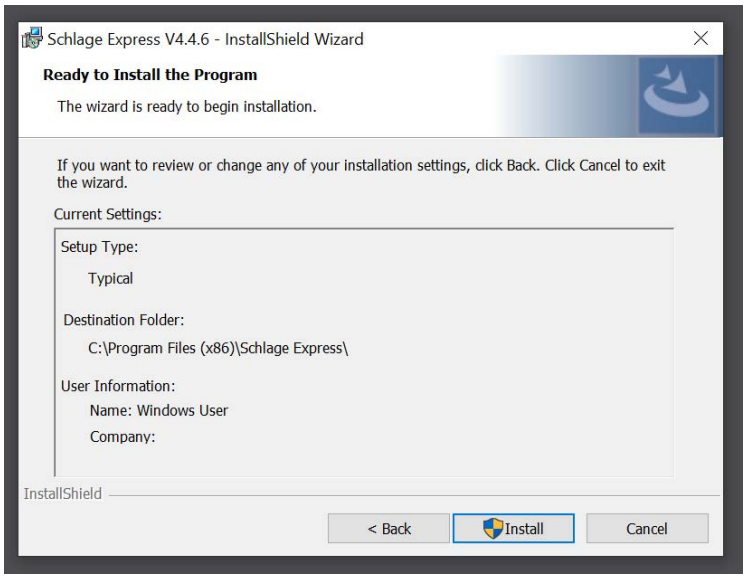


6. Enter a User Name and Organization in the provided fields.
7. Click Next.

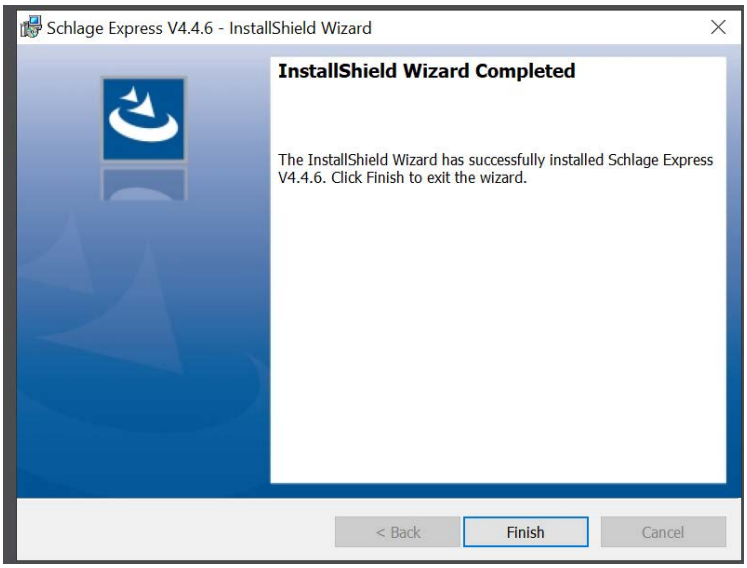


8. Click Install. The installation process will begin.





9. When the process is complete the Completed screen will open.
10. Click Finish. Schlage Express is now installed.



Obtaining and Using Unlock Key

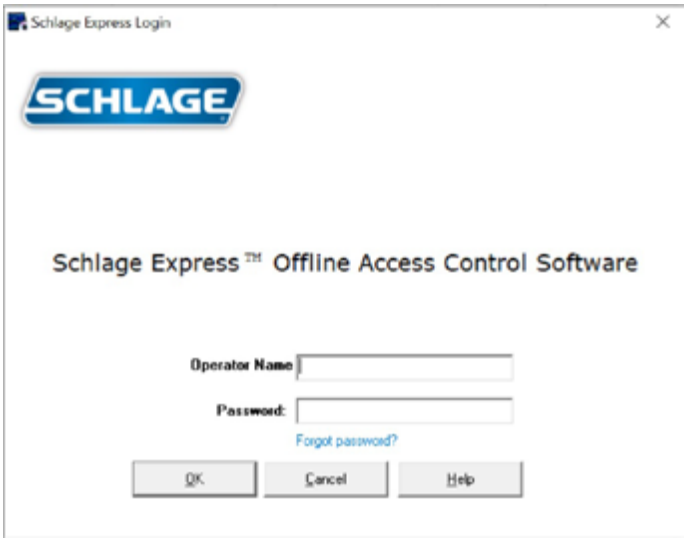
After completing the installation of Schlage Express you will need to obtain and unlock key via online form and email, and then copy/paste it into Schlage Express. Follow the instructions below.

➔ Until you receive your unlock, select “Trial basis” at startup.

➔ The example images show a sample serial number, but you should use the serial number from your specific machine.

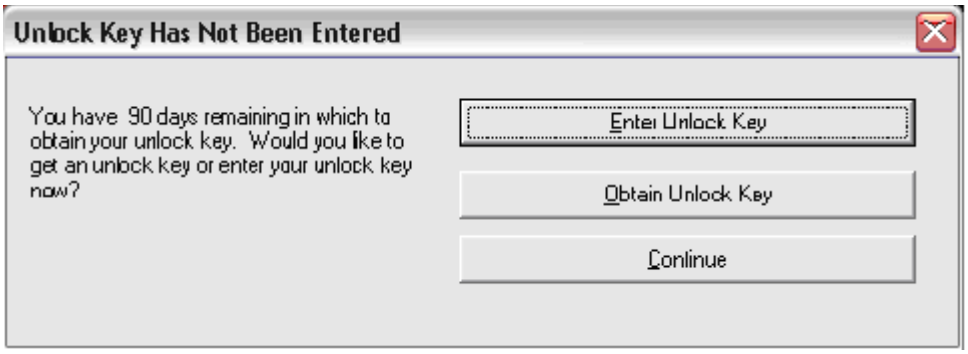
Obtaining an Unlock Key

1. Double-click on the desktop icon to start the Schlage Express application.
2. Enter the default Operator Name (manager).
3. Enter the default Password (123456) and then click OK.



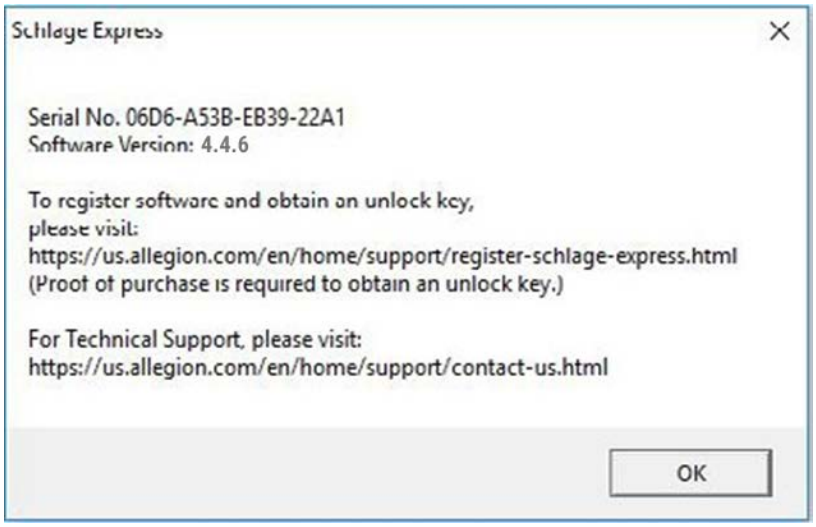
4. The first time you start the software, the Change Password box will appear. Enter your new password into both boxes, and then click OK.

5. Click Continue. The Unlock Key Hasn’t Been Entered window will open.
6. Click Obtain Unlock Key.



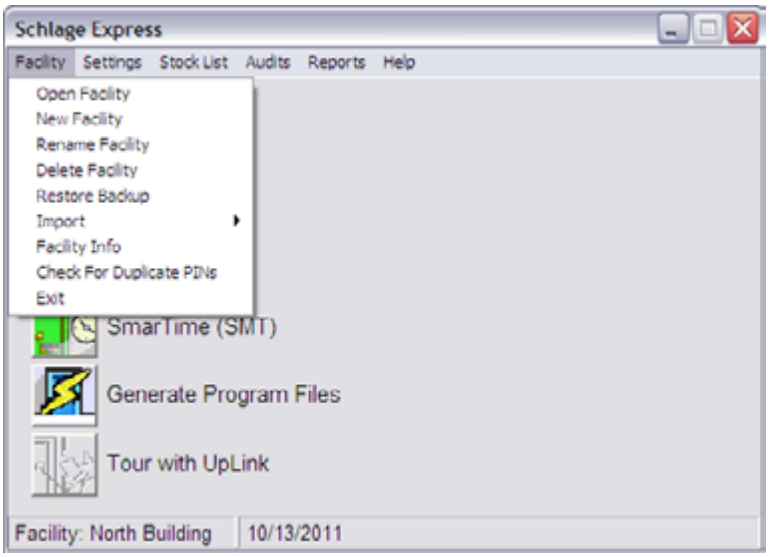
7. The Select Appropriate Option Below window will open. Click the radio button for the I have already purchased this software... option to obtain an Unlock Key.
8. Click OK.

9. The Obtain Unlock Key window will open.
10. Follow the instructions in the Obtain Unlock Key window to receive your Unlock Key.
11. Make note of the Unlock Key, you will need to enter it in the steps below.
12. Click OK.



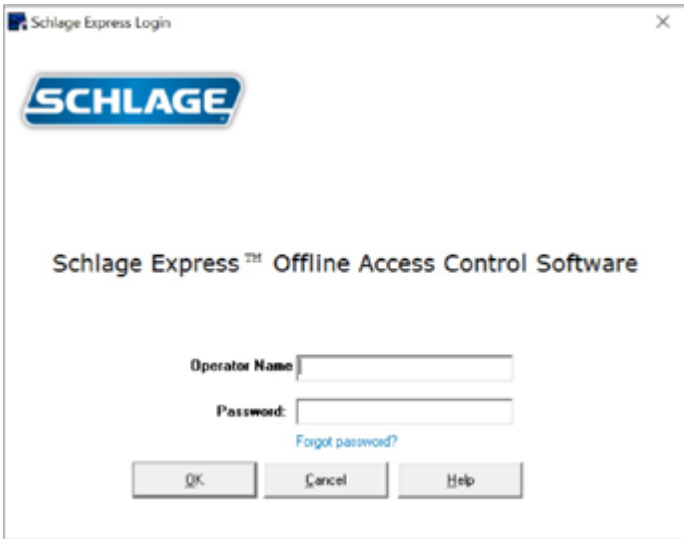
13. The Schlage Express Main Menu will open.

14. Exit Schlage Express by selecting Facility>Exit.
15. Follow the steps in **Entering the Unlock Key** on page 16 to enter the Unlock Key.

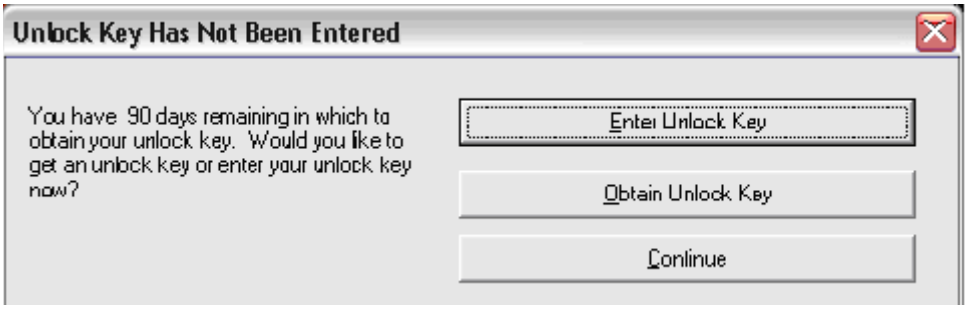


Entering the Unlock Key

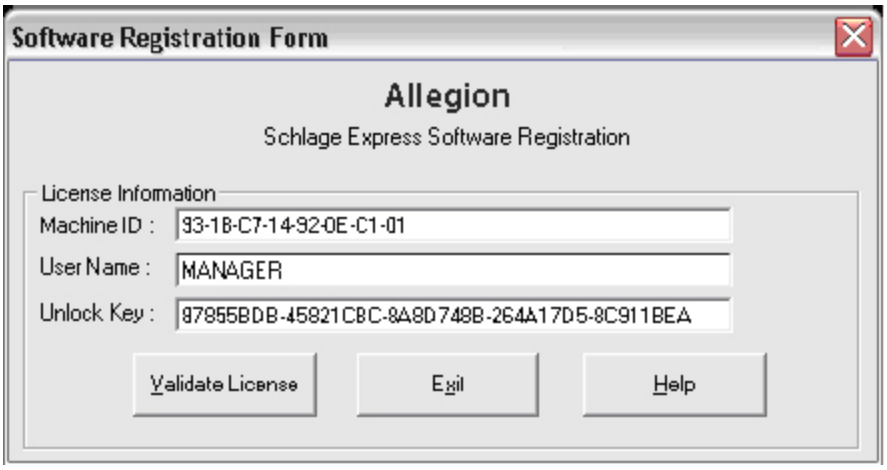
1. Double-click on the desktop icon to start the Schlage Express application.
2. Enter the Operator Name and Password. Then click OK.



3. The Unlock Key Hasn't Been Entered window will open. Click Enter Unlock Key.



4. The Software Registration Form will open.
5. Enter your Unlock Key. The default user name will be MANAGER in all uppercase letters.
6. NOTE: Your Machine ID and Unlock Key will be different than that shown in the example.
7. Click Validate License.

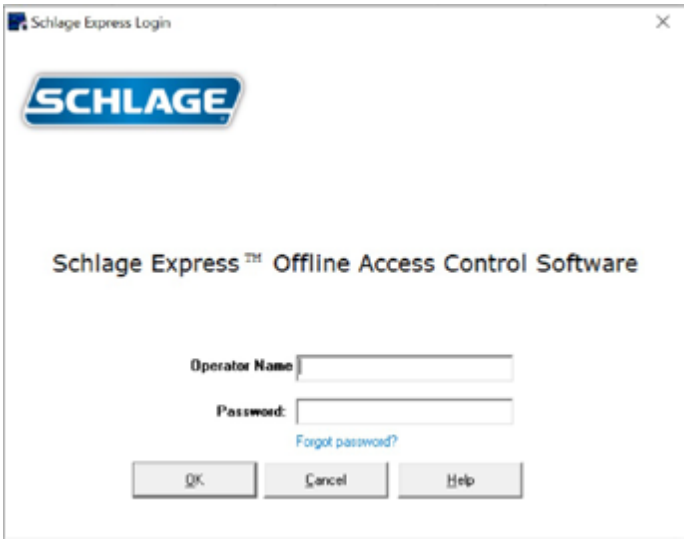


8. If successful the main Schlage Express window will open.
9. Follow the steps in **Starting Schlage Express** on page 18 to verify the software.

Starting Schlage Express

Starting Schlage Express requires an Operator Name and Password, usually obtained from the Facility Manager.

1. Double-click on the desktop icon to start the Schlage Express application.
2. Enter the Operator Name and Password. Then click OK.



3. The system displays the Schlage Express Main Window. You are now ready to use the Schlage Express software.

➔ NOTE: The Facility name is in the lower left corner. If this is not the facility for which you need to make changes,go to Facility>Open Facility and choose the correct Facility.

Setting Up the Site/Quick Start

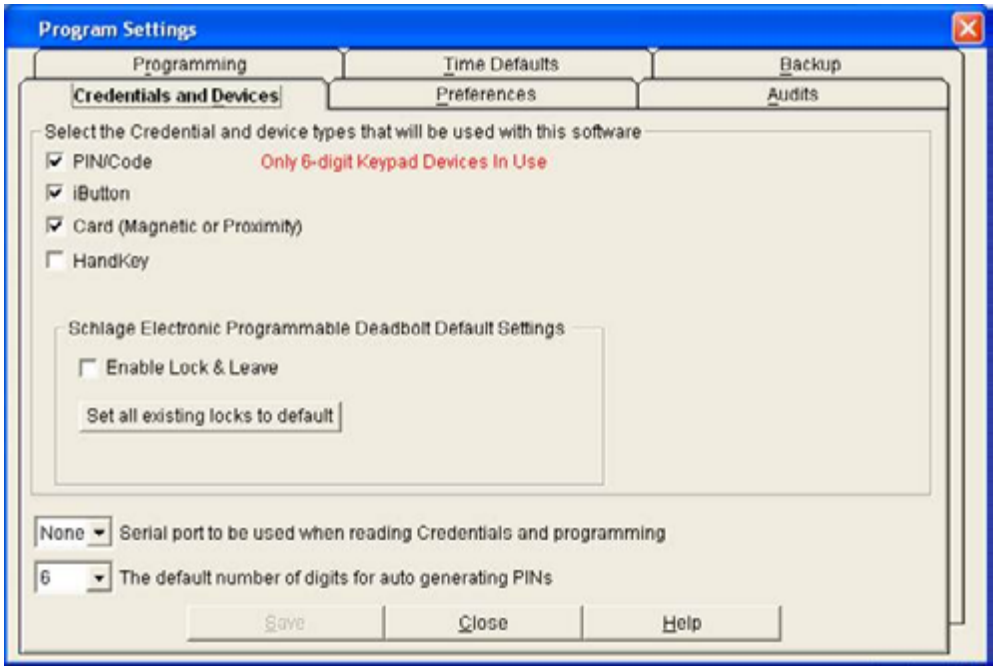
Creating a Facility

A facility is an Schlage Express database representing a physical or logical place for door location. Schlage Express requires one facility, but can manage multiple ones. Facilities are independent and cannot share data. When you first install Schlage Express a facility must be created. Follow the directions below to create a Facility.

1. In the Main Menu, select Facility > New Facility. The Creating a New Facility window will open.
2. Enter a name for the facility. Choose a name that describes your facility. A facility can be a building or an entire site. It can also be a floor, an annex, or a logical group, such as all entrances or all office doors.
   - ➔ NOTE: The facility name cannot contain the following characters: # “ / \ . < > : | * ?
3. Click OK. The name of your facility will appear in the lower left corner of the Main Menu.

Setting Credentials

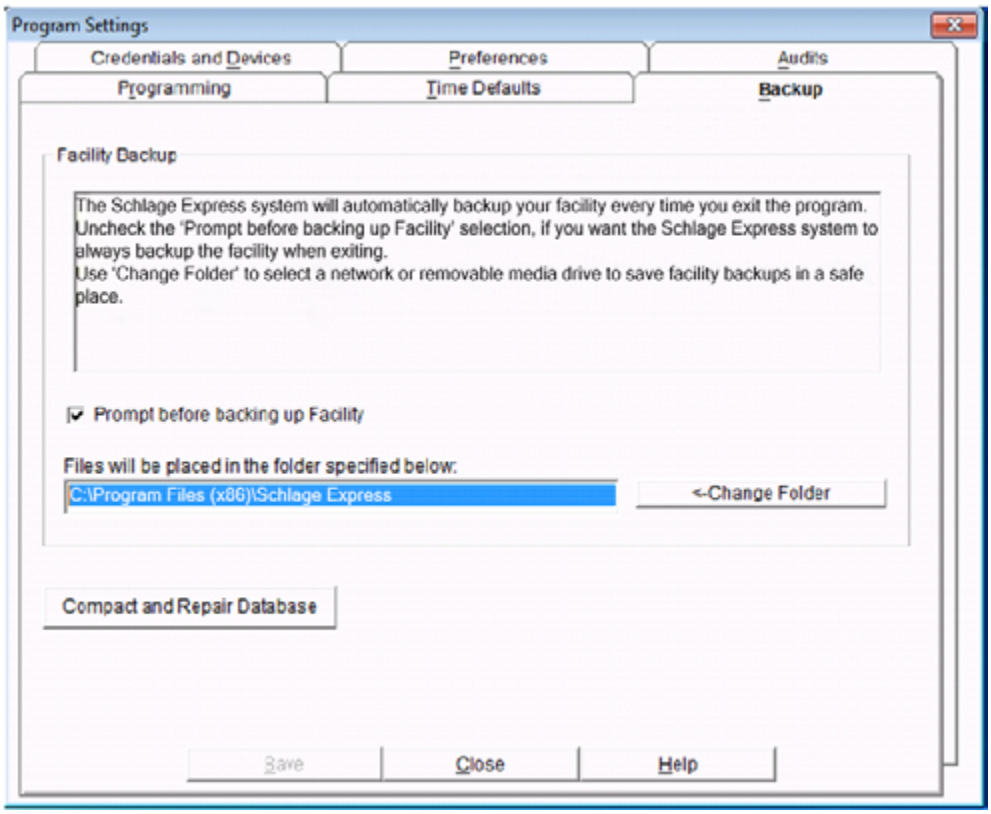
Setting credentials for a facility consists of specifying the credential type that the facility will use, and setting any identifying parameters.



1. Select Settings > Program Settings in the Main Menu.
2. In the Program Settings window, select the Credentials and Devices tab.
3. Change any of the default selections according to which credential technology your facility will be using by unselecting or selecting the appropriate credential types. The default selection when you create a new facility will use PIN/Codes, iButtons, and Card credentials.
   - ➔ Note: The Keypad Device type(s) in use (6 digits, 12 digits, or both) is automatically displayed next to the PIN/Codes field.
4. If changes are made to the default settings click Save. DO NOT click Close at this time.

Setting the Facility Backup Location

Always back up the facility and store the backup file in a safe location. Failure to back up the facility risks complete data loss.



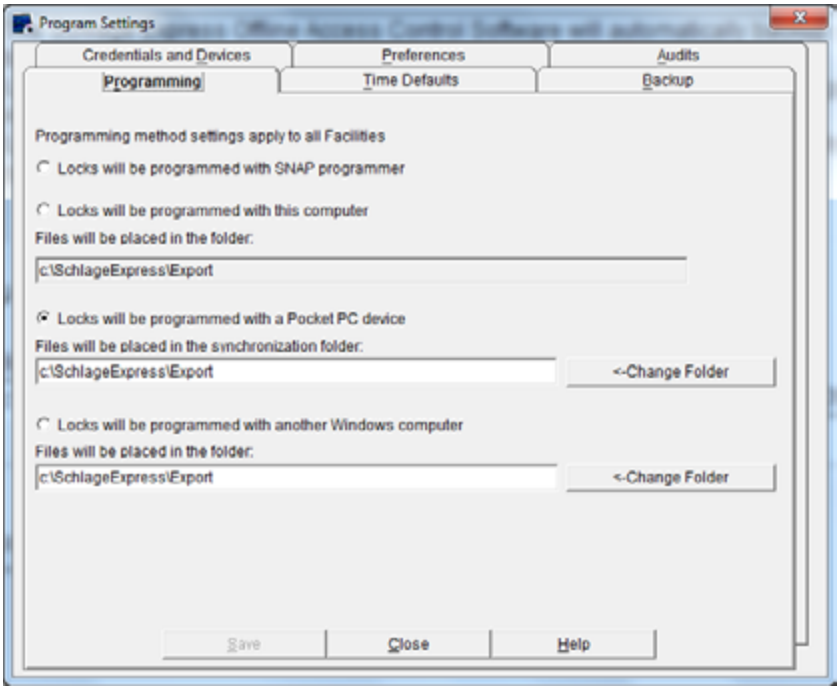
1. In the Program Settings window, select the Backup tab.
2. Click the Prompt before backing up Facility check box if you want a reminder prompt to appear each time you close the facility. Otherwise, Schlage Express backs up the facility automatically when you close the facility.
3. To change the location of the backup folder, click Change Folder. The Select Path Window will open. The default location is C:\Schlage Express\
4. Navigate to the new location in the Select Path window, click OK.

➔ Note: You should always copy your backed up databases to a network share, another hard drive, or external USB Drive. If your computer fails your databases are safe, secure, and recoverable.

5. Click Save. DO NOT click Close at this time.

Setting the Synchronization Folder

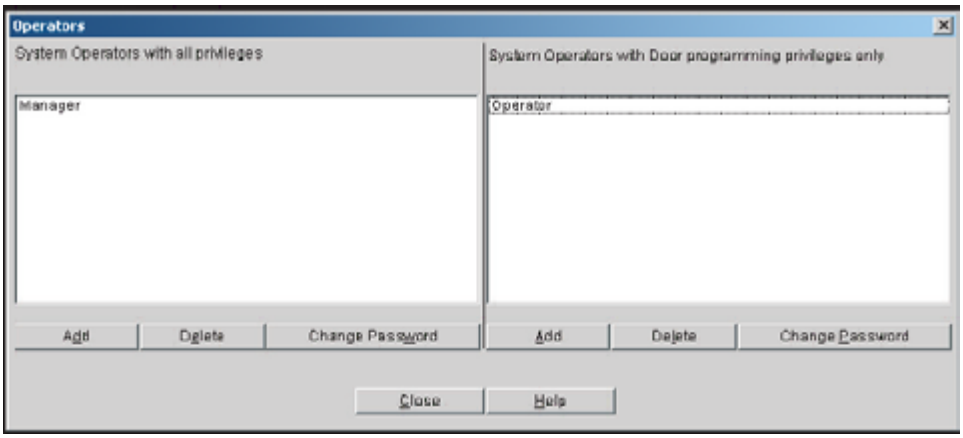
Microsoft® ActiveSync® or Windows Mobile Device® created a synchronization folder on the desktop PC that the HHD uses to synchronize files with the desktop PC. Schlage Express must know that location. The following procedure identifies the location of the synchronization folder so that Schlage Express can use it.



1. In the Program Settings window, select the Programming tab.
2. Click Locks will be programmed with a Pocket PC device (the HHD).
3. Click Change Folder. The Select Path window will open. The default location is: C:\Schlage Express\Export
4. In the Set Path window, locate and select the folder that you recorded during the Installing Microsoft® ActiveSync® section.
5. Click OK. The Set Path window will close.
6. In the Program Settings window, click Save, then click Close.

Adding System Operators

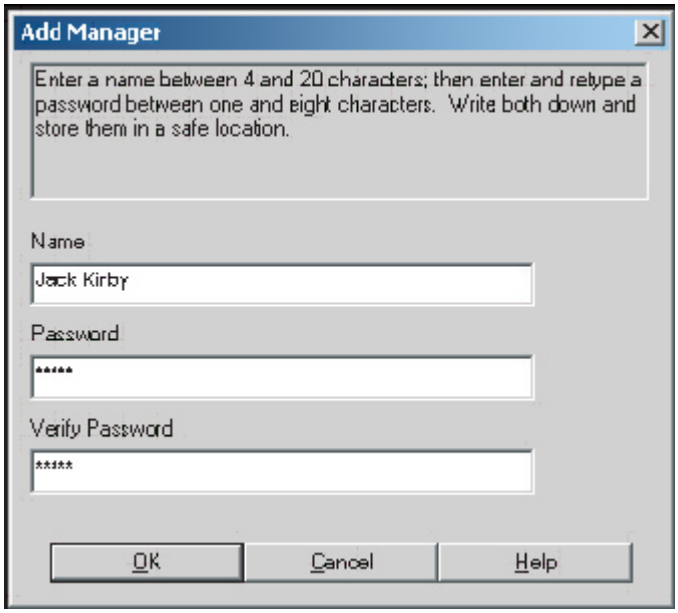
Adding system operators enables you and other staff members to have log in access to the Schlage Express software. After you add at least one System Operator with all privileges, remember to delete the default Manager and Operator.



1. In the Main Menu, select Settings > Operator Settings. The Operators window will open.
2. Click Add at bottom of Manager pane to add a System Operator with all privileges (manager). The Add Manager window will open.

➔ NOTE: Managers have access to all Schlage Express functionality.

3. In the Add Manager window:
   - Enter the person's name (4 to 20 characters).
   - Enter a password (1 to 8 characters).
   - Re-enter password.
   - Click OK. The Add Manager window will close and the person is added to the Manager pane of the Operators window. Repeat these steps for any additional Managers.



4. Click Add at bottom of Operator pane to add a System Operator with Door Programming privileges only (operator). The Add Programmer window will open.

➔ NOTE: Operators have restricted access; that is, they can only open a facility and program locks.

5. In the Add Programmer window:
   - Enter the person's name (4 to 20 characters).
   - Enter a password (1 to 8 characters).
   - Re-enter password.
   - Click OK. The Add Programmer window will close and the person is added to the Operator pane of the Operators window. Repeat these steps for any additional Operators.
6. After you add all System Operators, delete the default Manager and Operator entries.
7. Click Close.

Assigning a Programming iButton Electronic Deadbolts

This section covers how to assign a programming ibutton to both Legacy KC2 Locks and to the BE367 Schlage Programmable Electronic Deadbolt.

BE367 Schlage Programmable Electronic Deadbolt

A red programming iButton enables you to set a lock into programming mode. BE367 locks direct from the factory do not initially accept the Programming iButton. You can assign a Programming iButton to each BE367 lock by the following steps.

1. At any BE367 lock, press a red programming iButton to the BE367 lock's iButton receptacle. The indicator light flashes green and red.
2. While the indicator is flashing the BE367 is in programming mode.
3. Connect the CIP to the BE367. The lock can now be programmed.

Legacy KC2

A programming iButton enables you to set a lock into programming mode. Legacy KC2 locks direct from the factory do not initially accept the Programming iButton. You can assign a Programming iButton to each Legacy KC2 lock by the following steps.

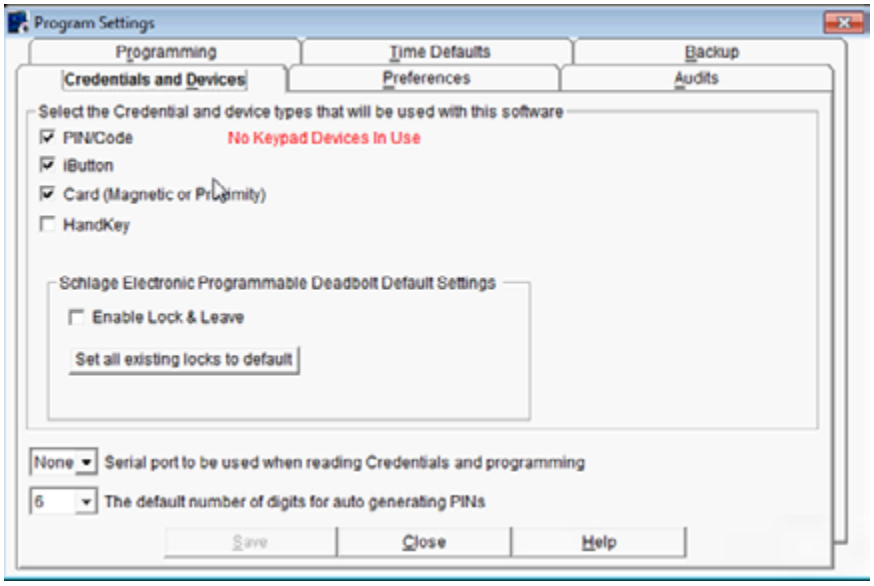
1. At any Legacy KC2 lock, enter the factory default programming code: 9 7 5 3 1 * The factory default code sets the KC2 lock into programming mode.
2. When the flashing stops, enter the code: 7 *
3. Press a programming iButton to the KC2 lock's iButton receptacle. The indicator light flashes green and red.
4. When the flashing stops, remove the iButton. The KC2 lock will now accept the iButton for programming.
    - The factory default code will no longer be valid.
    - All KC2 locks will accept a Black iButton as a programming key. You can only use a Red iButton to program a KC2 Deadbolt.

Settings

You can customize certain aspects of system operation using the Settings menu.

Program Settings

You can change the program settings using the Program Settings menu. There are six (6) tabs in the Program Settings menu. Each tab is used to control a different aspect of the system.



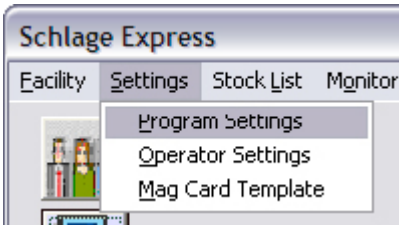
Credentials and Devices

You can select which credentials and devices can be used with the system. By selecting only the credentials and devices that you currently use, screens and dialogs will be easier to navigate.

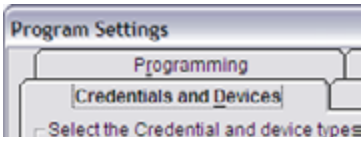
➔ NOTE: When you select or deselect credential and device types in this tab, the credential and device types that are available on other screens will be changed.

Specifying Which Credentials and Devices are Available in the System

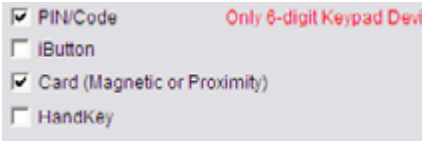
1. Click **Settings > Program Settings**.



2. Click on the **Credentials and Devices** tab.

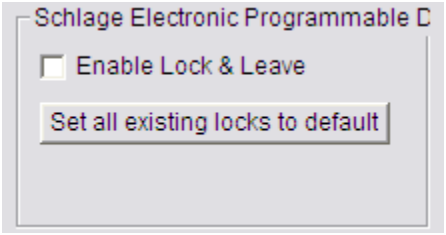


3. Click to select/deselect the desired credentials and devices. Credentials and devices with check marks next to them will be enabled in the system.



   ➔ Note: The Keypad Device type(s) in use (6 digits, 12 digits, or both) is automatically displayed next to the PIN/Codes field. See **How the Number of Buttons Affects PINs** on page 24 for more information.

4. OPTIONAL: If you are using any BE367 Deadbolts in your facility, and want to enable or disable the Lock & Leave feature by default, click to check or uncheck the check box for Enable Lock & Leave.



   ➔ Note: If the Enable Lock & Leave check box is checked, all new BE367 Deadbolt doors will have the Lock & Leave feature enabled. You can disable this feature later, per door.

   a. If you have already created BE367 Deadbolt doors in your facility and want to enable or disable the Lock & Leave feature on all of them, click **Set all existing locks to default**. All BE367 Deadbolt doors already in the facility will be changed to match the currently selected default.

5. Click **Save**.

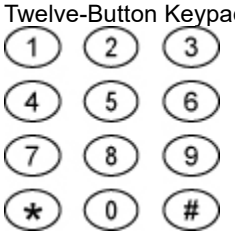
How the Number of Buttons Affects PINs

Some locks have only six (6) buttons while others have twelve (12) buttons. If you are using locks with only six buttons in your facility, the number of PIN combinations is halved, since each button of a six button keypad has two numbers on it.

- Six-Button Keypad

For example, if you are using any locks with six-button keypads in your facility, the PINs 13579 and 24680 are the same, because the same button combination is pressed to enter the two codes.

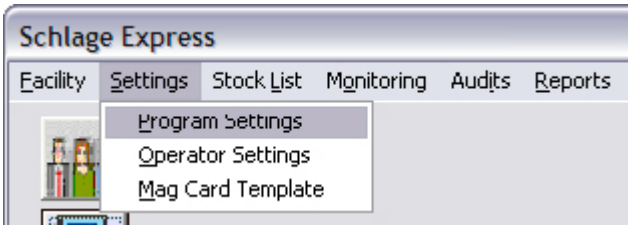
- Twelve-Button Keypad



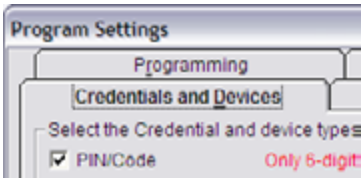
If you are using only locks with twelve-button keypads in your facility, each number has an individual key. Therefore, the PINs 13579 and 24680 are different, because a different button combination is pressed to enter the two codes.

Setting the Default PIN Length

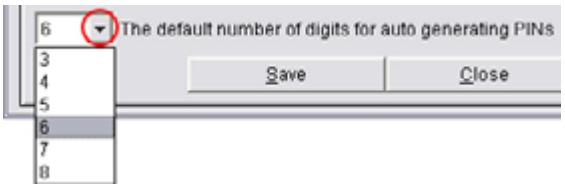
1. Click **Settings > Program Settings**.



2. Click **Credentials and Devices**.



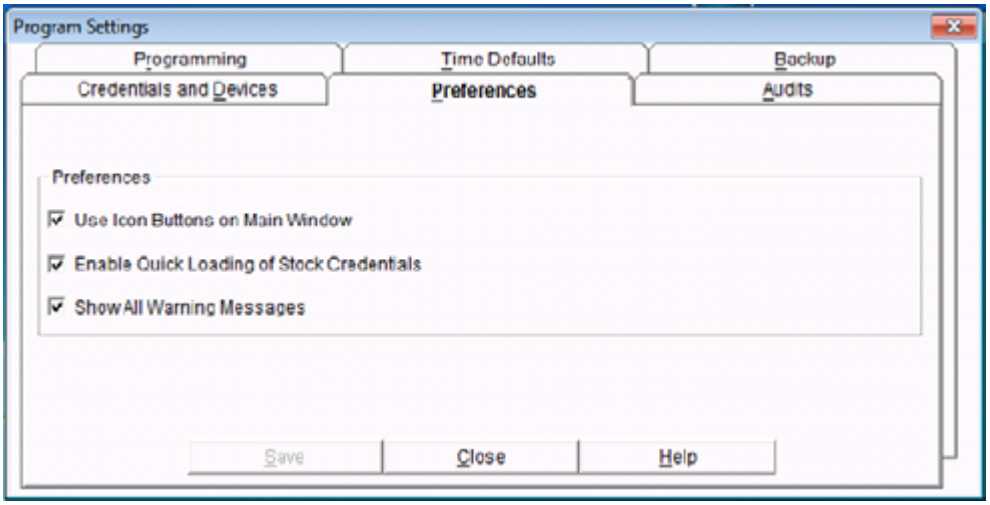
3. Select the default PIN length from the drop-down box.
4. Click **Save**.



Duplicate PINs

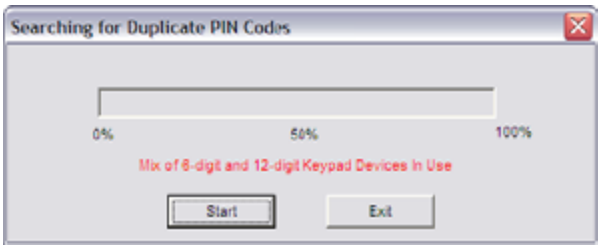
If a duplicate PIN is entered, the system will warn the user to change the PIN value. To manually search for duplicate PINs in the system:

1. Go to **Facility>Check for Duplicate PINs**. The Searching for Duplicate Pins window will open.
2. Click **Start**. The system will search for duplicate PINs.



Preferences

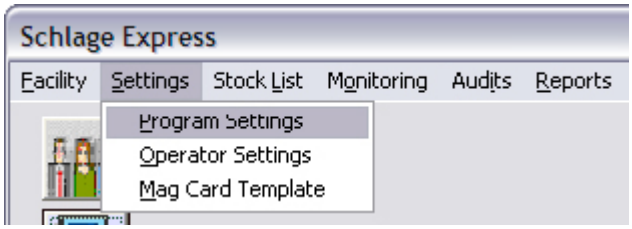
The Preferences tab allows you to customize the look and functionality of some features of the system.



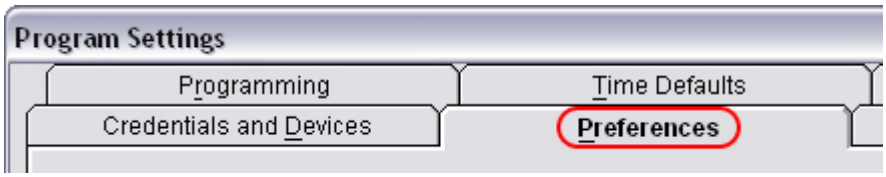
Change the Look of the Main Window

There are two options for the look of the main window. The default look includes icons for Users, Doors, Access Rights, SmarTime (SMT), Generate Program Files and Tour with UpLink. You can choose to disable the icons, so that the listed functions are simple buttons, as shown.

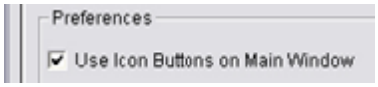
1. Click **Settings > Program Settings**.



2. Click **Preferences**.



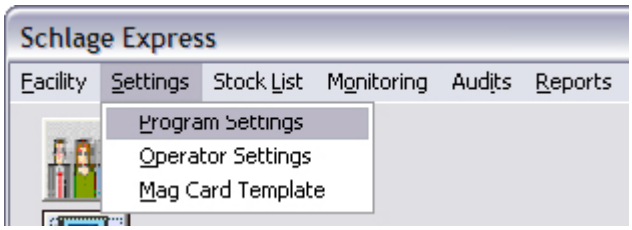
3. Click to check or uncheck the **Use Icon Buttons on Main Window** check box.
4. Click **Save**.



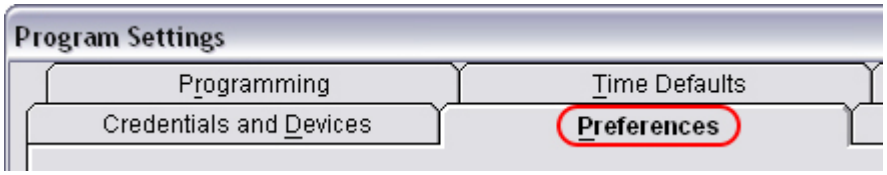
Enable/Disable Stock List

➔ Note: See **Stock List** on page 52 for more information.

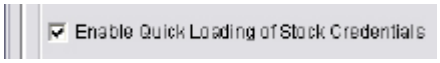
1. Click **Settings > Program Settings**.



2. Click Preferences.



3. Click to check or uncheck the Enable Quick Loading of Stock Credentials check box.

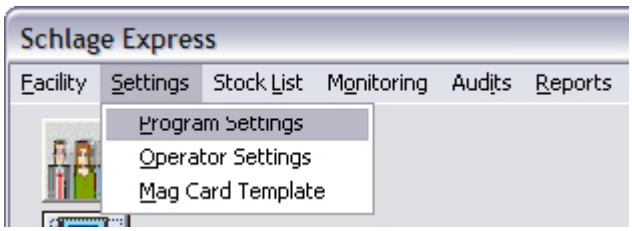


   ➔ Note: When this box is unchecked, the Stock List menu will not be available in the menu bar.

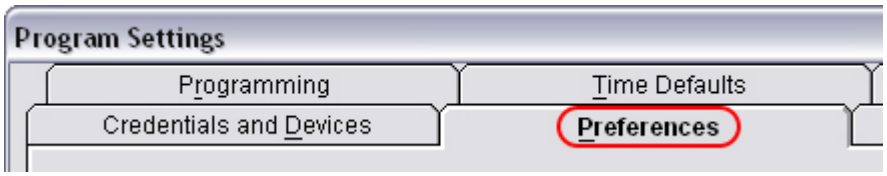
4. Click **Save**.

Enable/Disable Warning Messages

1. Click **Settings > Program Settings**.



2. Click **Preferences**.



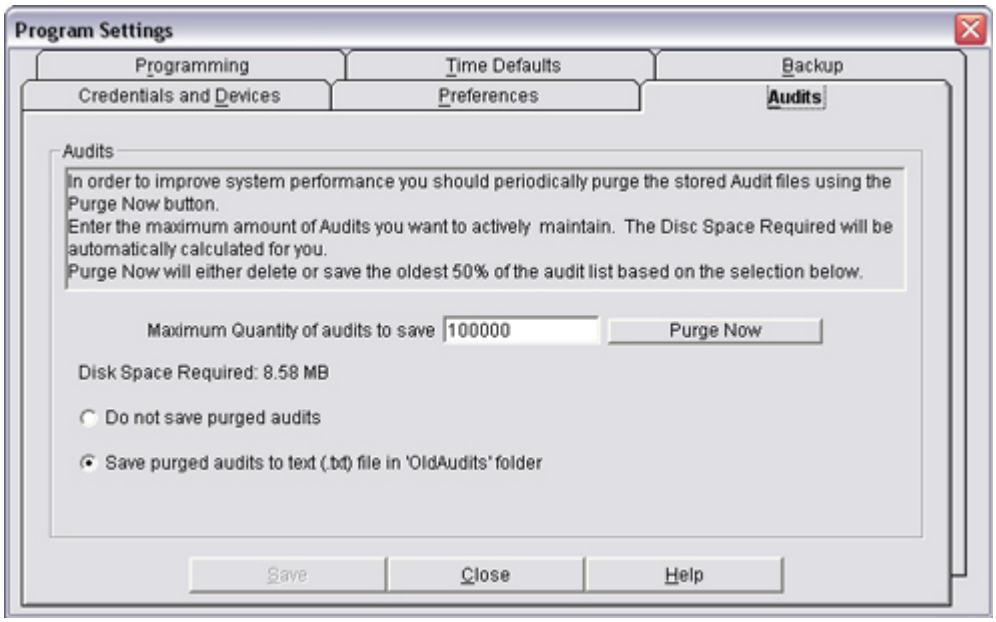
3. Click to check or uncheck the Show All Warning Messages check box.

   ➔ Note: When this box is unchecked, the warning messages will not be displayed.

4. Click **Save**.

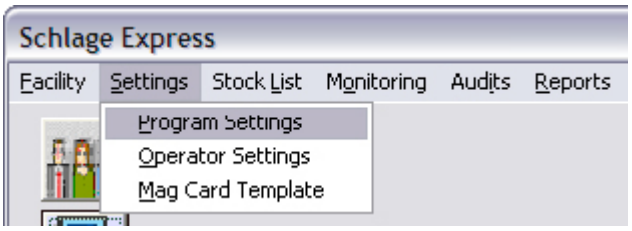
Audits

In the Audits tab, you can change the maximum quantity of audits to be saved, purge audits and configure how purged audits are handled.



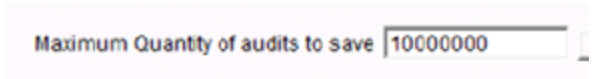
Change the Maximum Quantity of Saved Audits

1. Click **Settings > Program Settings**.



2. Click **Audits**.

3. Enter the maximum quantity of audits to be saved in the box.
   - ➔ Note: This must be a number between 10 and 10,000,000. The default value is 10,000,000.
   - ➔ Reduce the number of audits to help the program load faster. Back up the Schlage Folder to an external drive (CD, DVD, Flash Drive) on a weekly basis and/or after any major add or delete. 10,000 is a good number to select as long as the database is backed up somewhere other than inside the Schlage Folder on the same machine.



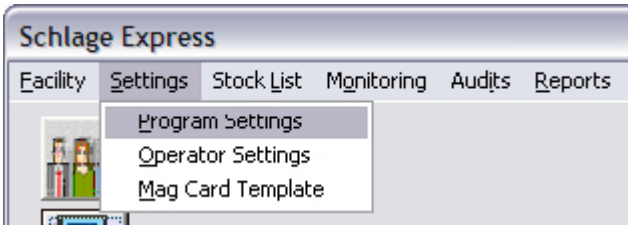
4. The amount of disk space required for the number you have entered will be automatically calculated. If this amount is unacceptable, enter a lower number.

5. Click **Save**.

Save Purged Audits

You can elect to **save** purged audits to a text file. If you elect to **save** purged audits, a text file with the current date as the file name will be saved in the OldAudits folder under the Schlage Express installation folder (usually C:\Program Files\Schlage Express\OldAudits\FacilityName -- for a 32 bit Platform or C:\Program Files (x86)\Schlage Express\OldAudits\FacilityName -- for a 64 bit Platform).

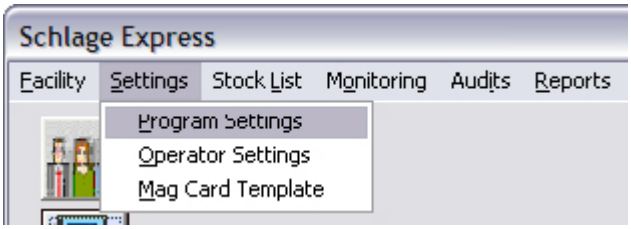
1. Click **Settings > Program Settings**.



2. Click **Audits**.
3. You can either save purged audits to a text file or elect not to save them.
   - Click the **Do not save purged audits** radio button to elect not to **save** purged audits.
   - Click the **Save purged audits**... radio button to elect to **save** purged audits.
4. Click **Save**.

Purge Audits from Facility

1. Click **Settings > Program Settings**.



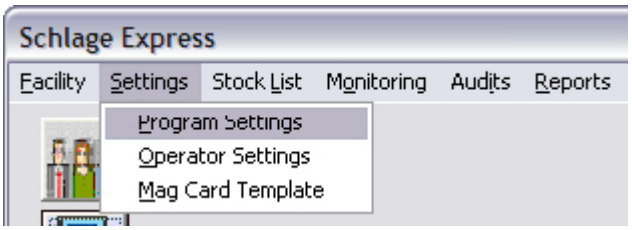
2. Click **Audits**.

3. Click **Purge Now**.
4. Click **OK**.
5. Click **Save**.

Programming

You can specify the programming method and location for programming files in the Programming tab.

1. Click **Settings > Program Settings**.



2. Click **Programming**.

3. You can choose from four programming methods. Click the radio button next to the method you want to use.
   - Program locks using a SNAP programmer -- Select this option if using one of the Legacy SNAP programmers.
   - Program locks using this computer. -- Select this option if using this computer.
   - Program locks using a Pocket PC. -- Select this option if using the Legacy Pocket PC or the New HHD (Hand Held Device). The user will need to use the Change Folder option to select where program files will be saved (see instructions below)
   - Program locks using another Windows computer. -- Select this option if using another Windows PC. The user will need to use the Change Folder option to select where program files will be saved (see instructions below)
4. If applicable, use the Change Folder option to select where program files will be saved (see instructions below).
5. Click **Save**.

If using the Program locks using a Pocket PC option:

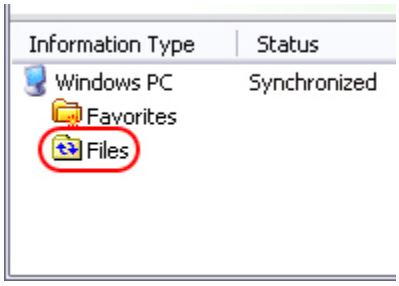
1. Click **Change Folder**.
2. Navigate to the folder being used for synchronization by the Pocket PC.
3. Click **OK**.
4. Click **Save**.

If using the Program locks using another Windows computer option:

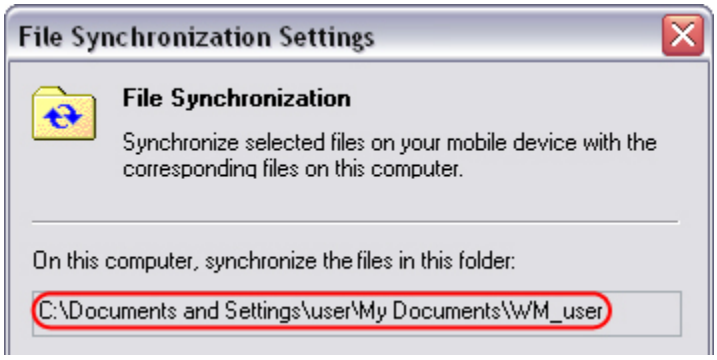
1. Click **Change Folder**.
2. Navigate to the folder being used for synchronization by the Pocket PC.
3. Click **OK**.
4. Click **Save**.

Locating the Pocket PC Synchronization Folder

1. Make sure the Pocket PC you are using for programming is attached to your computer and is turned on.
2. Launch Microsoft ActiveSync.
3. Double-click Files.
   - ➔ Note: The Pocket PC or HHD must be connected for this icon to be visible. If you cannot locate this icon, consult the help file in Microsoft ActiveSync for information on connecting your PocketPC/HHD.

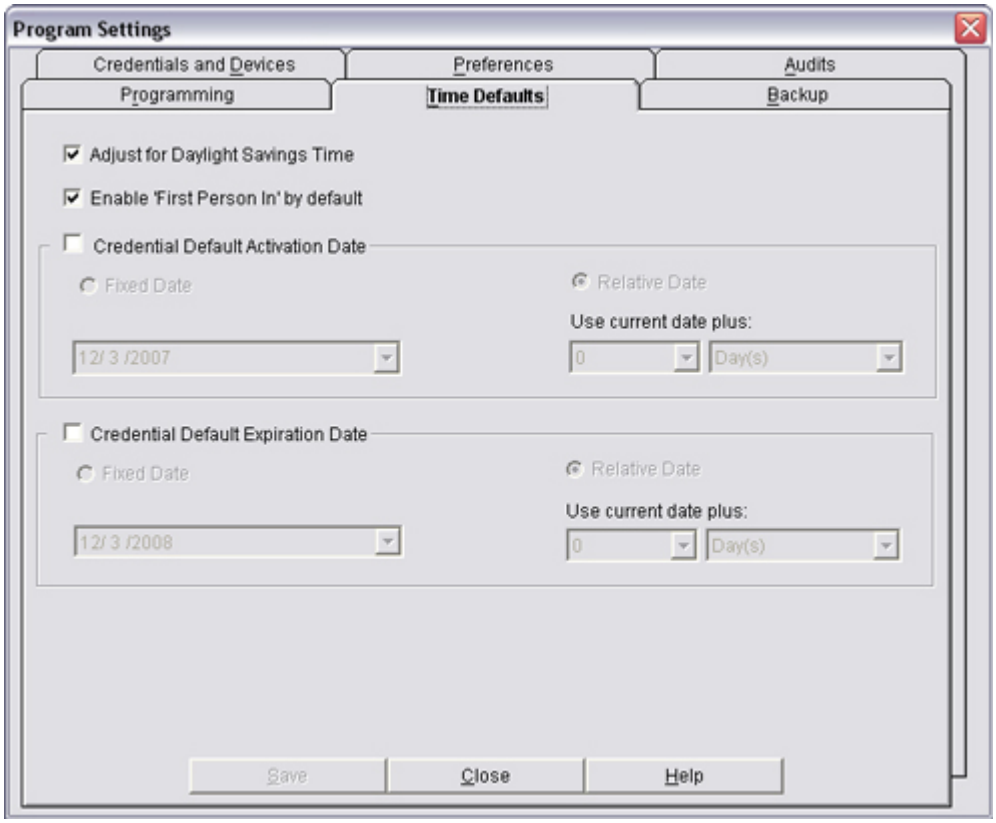


4. The File Synchronization Settings window will appear. The location of the synchronization folder is similar to the example shown below.
   - ➔ Note: You can copy and paste this path into the synchronization folder box on the programming tab, or use the Change Folder button to navigate to this folder.



Time Defaults

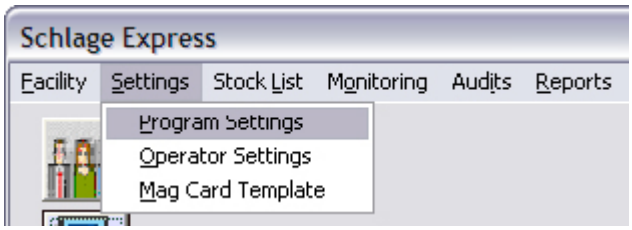
You can specify time defaults in the Time Defaults tab. By changing these defaults, you can **save** time on entries in other areas of the system.



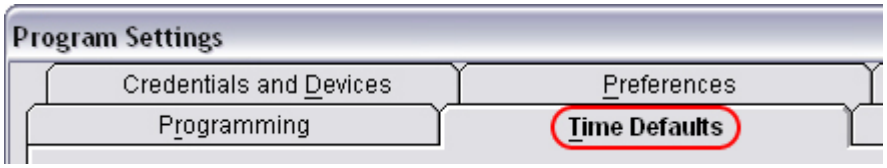
Enable/Disable Adjust for Daylight Savings Time

If this option is enabled (the box is checked), the system will automatically adjust for Daylight Savings Time. You should check this box unless the facility is located in an area that does not use Daylight Savings Time.

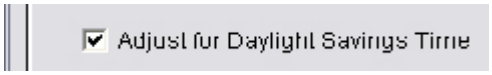
1. Click **Settings > Program Settings**.



2. Click **Time Defaults**.



3. Click to check or uncheck the check box next to enable or disable **Adjust for Daylight Savings Time**.



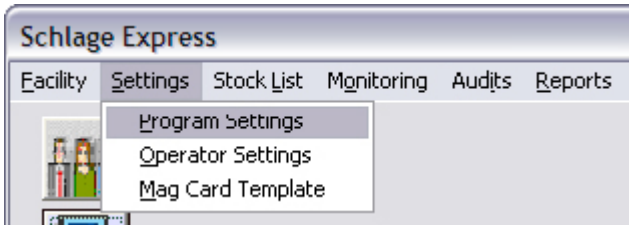
4. Click **Save**.

Enable/Disable First Person In by Default

The First Person In feature is used in combination with AutoUnlocks. If the First Person In feature is enabled, the lock will remain locked until a user presents a credential to open the door. The lock will then stay unlocked until the end of the AutoUnlock period. This feature guarantees that at least one person is present when the door is open. Not all devices are capable of this feature.

The First Person In by default option, when enabled, will make any lock that is capable of the First Person In feature to have it enabled by default.

1. Click **Settings > Program Settings**.



2. Click Time Defaults.

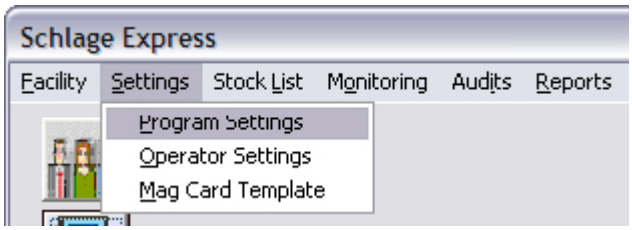
3. Click to check or uncheck the check box next to enable or disable First Person In by Default.

4. Click **Save**.

Enable/Disable Credential Default Activation and Expiration Date

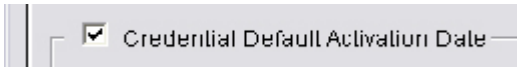
Setting these default dates does not mean that all credentials must abide by these rules. Both activation and expiration date can be changed in the user credential settings. The dates specified here will only be the default for new user records and will not affect existing user records in any way.

1. Click **Settings > Program Settings**.



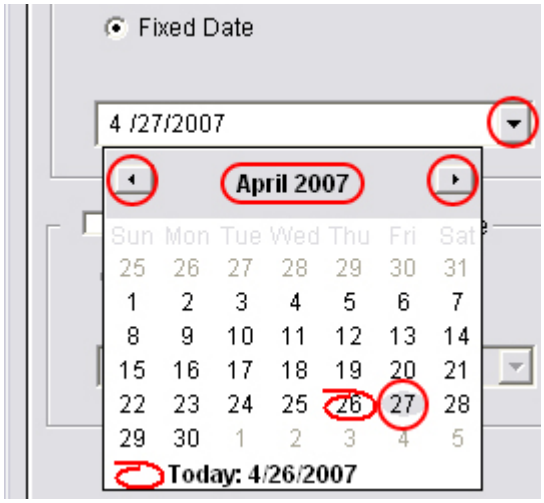
2. Click **Time Defaults**.

3. Click to check or uncheck the check box next to **Credential Default Activation Date** to enable or disable.

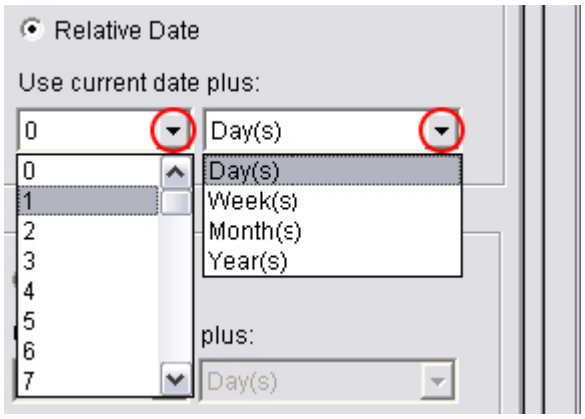


   - If enabling the date, continue to **step 4**.
   - If disabling the date, skip to **step 5**.

4. The default activation date can be either a fixed date or a relative date.
   - To set a fixed date, click the **fixed date** radio button and choose a date from the date drop-down box by clicking on the date.



   - To set a relative date, click the **relative date** radio button and choose a number from the number drop-down box and a unit of time from the unit of time drop-down box.



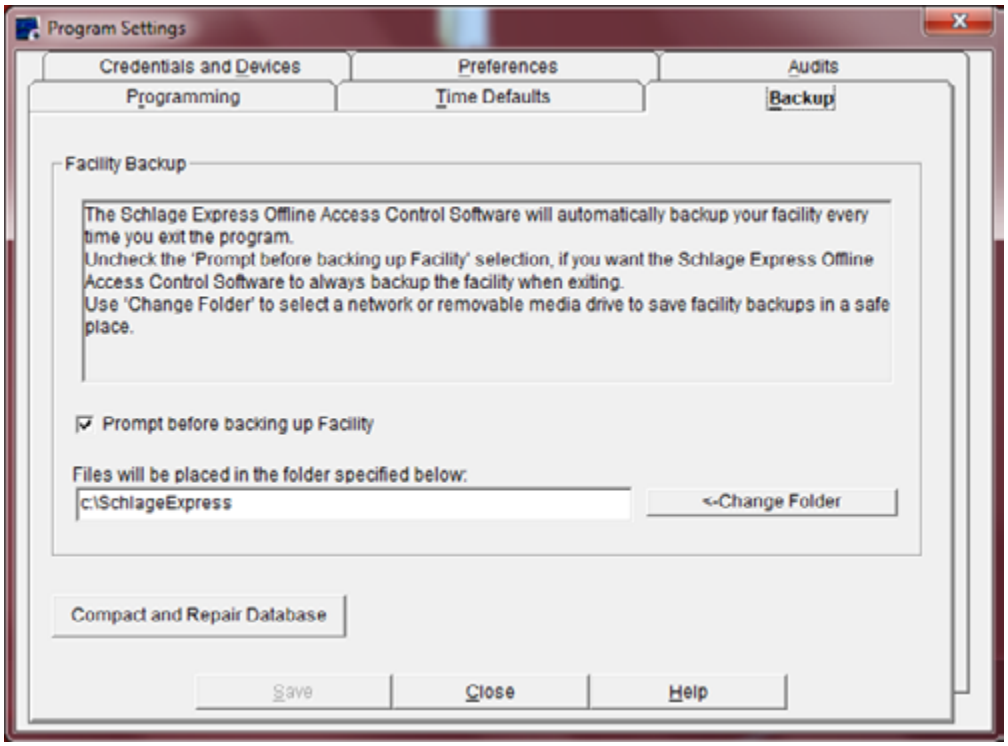
5. Click **Save**.

Backup

Each time a facility is closed, the system will attempt to create a backup of the facility. If you want to have the option to cancel the backup, you can set the system to prompt you before creating the backup.

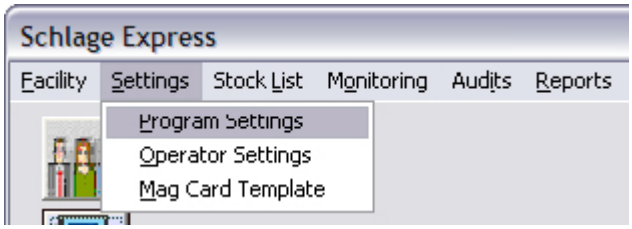
This option is enabled by default.

➔ Note: You should always copy your backed up databases to a network share, another hard drive, or external USB Drive. If your computer fails your databases are safe, secure, and recoverable.

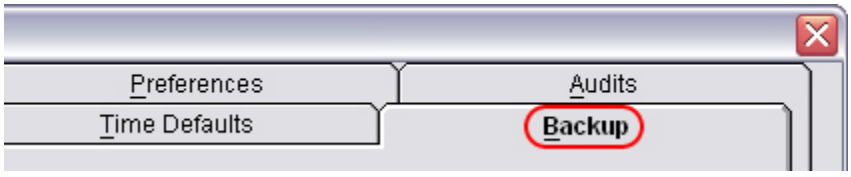


Change Backup Folder Path

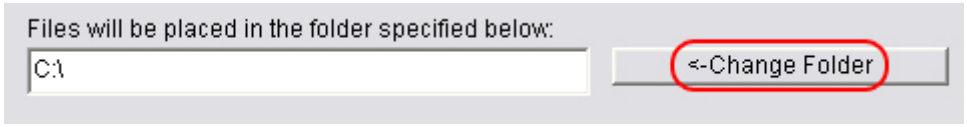
1. Click **Settings > Program Settings**.



2. Click **Backup**.



3. Click **<-Change Folder** to browse for the folder in which you want to store backup files, or type the path to the folder in the box.

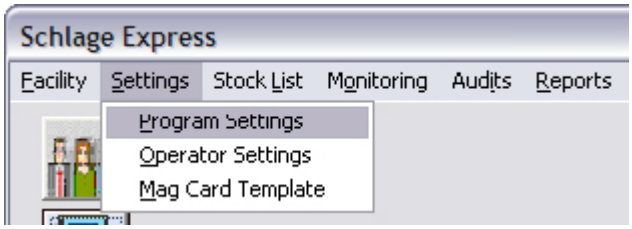


➔ NOTE: Permissions in Windows Vista and Windows 7 differ from those used in Windows XP. With the newer operating systems the user may not have complete Administrative rights to certain folders. The Backup destination must be located in a folder that the user has write permissions in order for the backup to be successful.

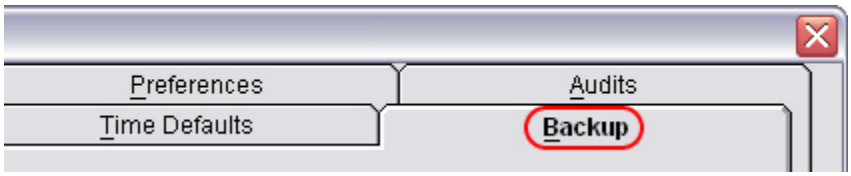
4. Click **Save**.

Enable/Disable Prompt Before Backup

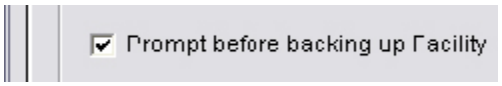
1. Click **Settings > Program Settings**.



2. Click **Backup**.



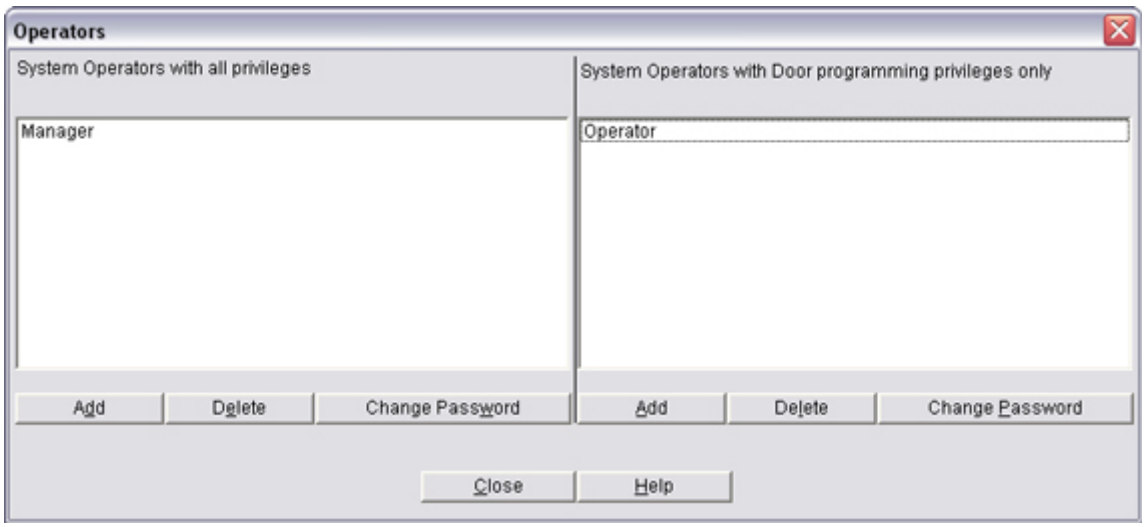
3. Click to check or uncheck the box next to **Prompt before backing up Facility** to enable or disable.



4. Click **Save**.

Operator Settings

Operator Settings is used to add, delete and edit managers and operators. Managers are configured on the left side of the screen. Programmers are configured are the right side of the screen.



Manager Accounts

A manager has complete access to all features in the system. One manager account is included in the system by default. It has the following properties:

- Operator Name: Manager
- Password: 123456

➔ Note: Change the password on this account immediately after logging in for the first time. Consider deleting this account after you have created another manager account to ensure system security. The number of manager accounts should be limited for security reasons.

Programmer Accounts

A programmer account has limited access to the system. Programmers are only allowed to generate program files and tour with uplink (if you are using your PC to tour your doors).

One programmer account is included in the system by default. It has the following properties:

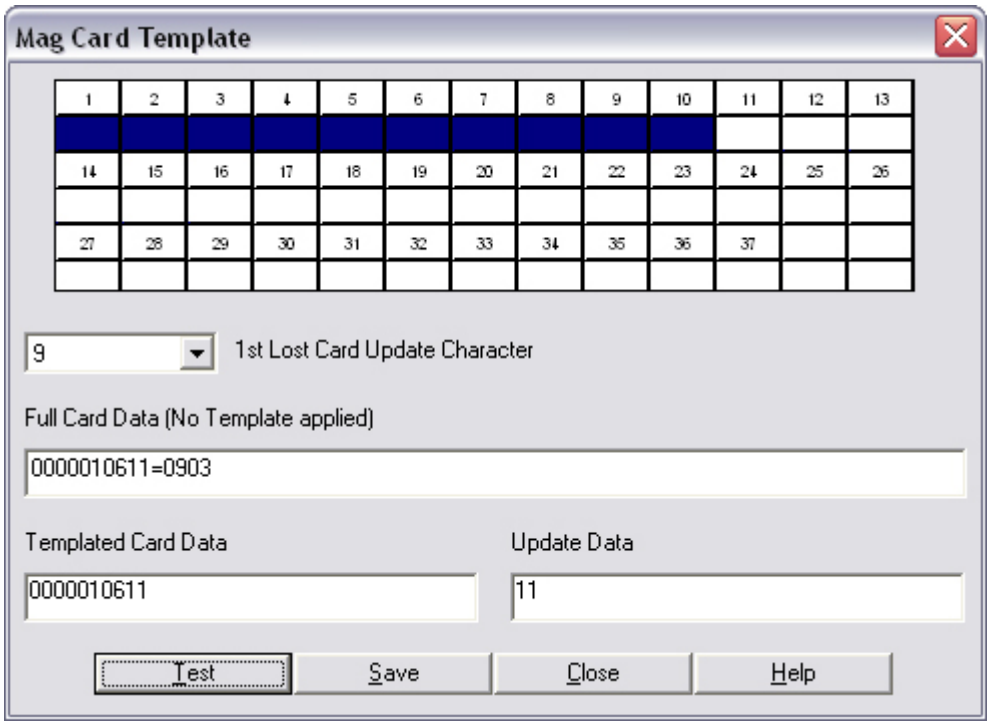
- Operator Name: Operator
- Password: 123456

➔ Note: Change the password on this account immediately after logging in for the first time. Consider deleting this account after you have created another operator account to ensure system security.

You should create a new account for each person who will have access to the system. When each person has an individual account, you can track the changes that were made by each system programmer.

Mag Card Template

A mag card that is used for access control is encoded with characters. Only 16 of these characters can be used by the system. Some of these characters may be set to be the same for all users within a facility and some of the characters are unique for each user. Only the unique characters are used for verification. The Mag Card Template is used to specify which characters should be used for verification.



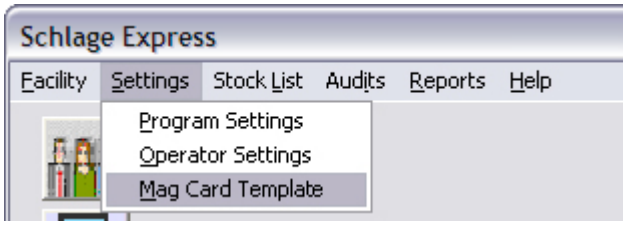
In the example, the data in the **Full Card Data (No Template applied)** box shows that the card has been encoded with a facility code, which is separated from the rest of the data by an equal sign (=). The first ten (10) positions have been specified in the mag card template.

The templated card data shows only the first ten (10) characters of the mag card data. The last five (5)digits do not need to be read by the system because they will be encoded to be the same for all cards in the facility. Using this technique, all cards from a particular facility can be easily identified by a system operator.

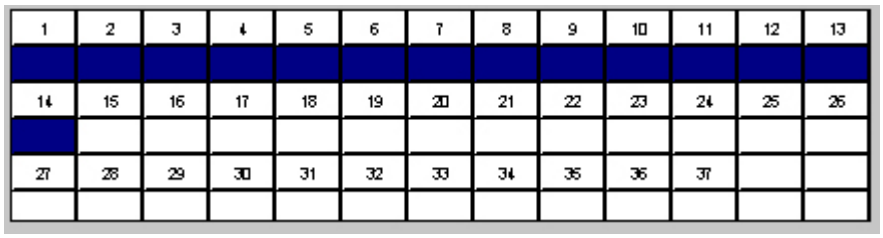
The two numbers in the Update Data box show the numbers in positions nine (9) and ten (10). This position is specified in the 1st Lost Card Update Character box. The update data is used for auto card replacement.

Edit the Mag Card Template

1. Click Settings > Mag Card Template.

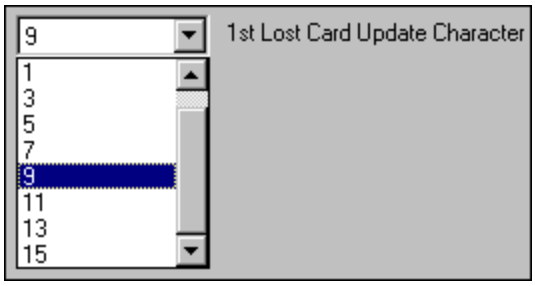


2. Click to select/deselect the positions to be used for the template.

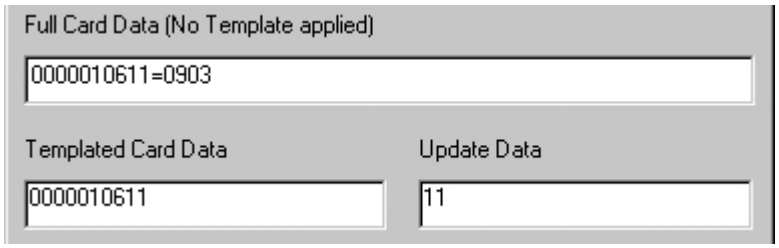


3. Choose the **1st Lost Card Update Character** from the drop-down list.

   ➔ Note: This position and the one immediately following it will be used for Auto Card Replacement (ACR).



4. You can test the mag cards to be used with the facility against the template.
   - If using a serial reader or a lock to read the cards, double click the box below **Full Card Date (No Template applied)**. Swipe the card within eight (8) seconds.
   - If using a keyboard card reader, click **Test** and swipe the card.
5. The data will be displayed in the three boxes.
   - **Full Card Data** shows all the data from the mag card.
   - **Templated Card Data** shows the data within the template.
   - **Update Data** shows the data used for lost card updates.
6. Click **Save**.

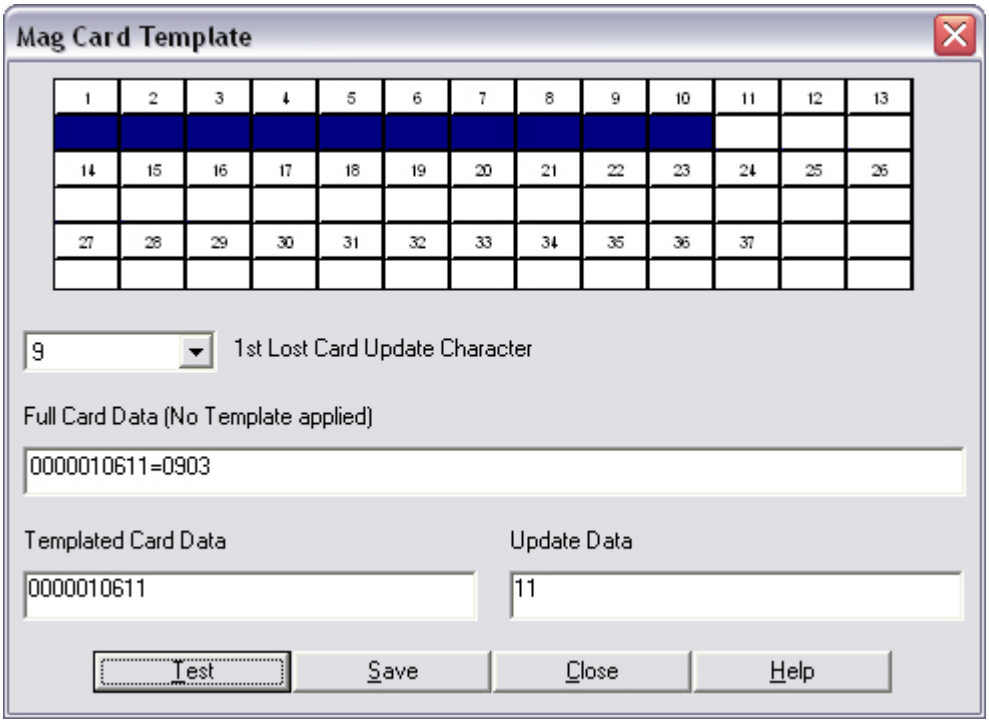


Auto Card Replacement

Auto Card Replacement (ACR) is a feature used to issue a new card when a card is lost.

In the example, ten (10) characters have been specified in the template. The last two (2) characters of the template, characters nine (9) and ten (10) have been selected for the auto card replacement characters. This is indicated in the 1st Lost Card Update Character box. The data in the Update Data box shows 11. If the auto card replacement feature is used on this card, the number will be incremented to 12.

Either one (1) or two (2) characters can be used for auto card replacement. To use only one character, choose the last character in the template for the 1st Lost Card Update Character.



➔ Note: Only certain characters are available for selection in the 1st Lost Card Update Character box. The mag card template can be adjusted until the character you want to select is available.

➔ Note: If only one (1) character is used, the number of replacement cards is limited to nine (9) cards. If two (2) characters are used, the number of replacement cards is limited to ninety-nine (99) cards.

Stock List

The Stock List feature is used to load iButtons and cards into the system in bulk. These credentials can then be selected and assigned to a user.

Note: This menu is only available if Enable Quick Loading of Stock Credentials is selected in the Preferences menu. Only credentials that have been enabled in the Preferences menu will be available in the Stock List menu.

➔ For FIPS Compatible: do not use the Stock List - enroll a new credential every time. Register all credentials returned and/or lost as LOST. The Enrollment Reader will bring in the FIPS credential information required.

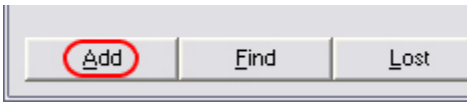
Stock List iButtons

From here the user can **Add**, Find, Trash and Mark as Lost any iButton credential in the system.

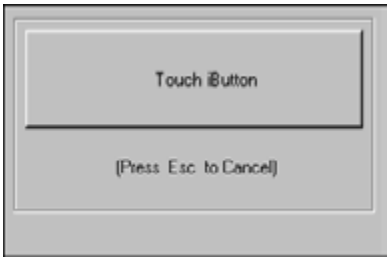
➔ iButton is not a FIPS Compatible credential.

Add iButtons to the Stock List

1. Click **Stock List > iButtons**.
2. Click **Add**.

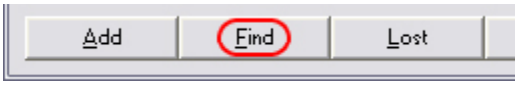


3. The **Touch Button** box will appear. While this box is visible, touch the iButton to the iButton reader.
4. If you have more iButtons to enter, touch each iButton to the reader until all of them are entered
5. Press the Esc key on your keyboard after all the iButtons have been entered.

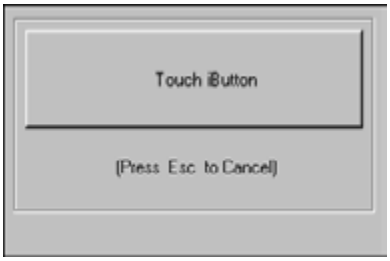


Find an iButton in the System

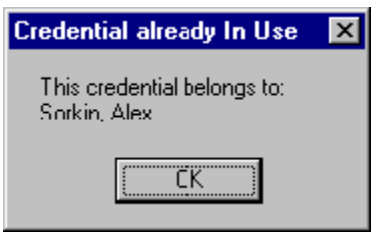
1. Click **Stock List > iButtons**.
2. Click **Find**.



3. When the box below appears, touch the iButton you want to find in the system to the iButton reader.



4. If the iButton is in use in the system, it will be displayed.
   - If the iButton is assigned to a user, the following box will appear. Click OK to close the box.
   - If the iButton is in the stock list, it will be highlighted in the stock list window.

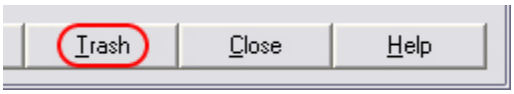


Trash an iButton in the Stock List

If an iButton in the stock list stops functioning, the iButton can me marked as trashed.

1. Click **Stock List > iButtons**.
2. Click to select the number of the iButton you want to delete.

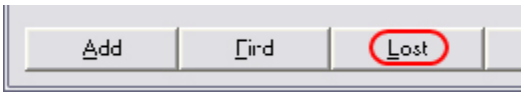
3. Click **Trash**.
4. Click **Yes**.



Mark an iButton as Lost

1. Click **Stock List > iButtons**.
2. Click to select the number of the iButton you want to mark as lost.

3. Click **Lost**.
4. Click **Yes**.



Stock List Cards

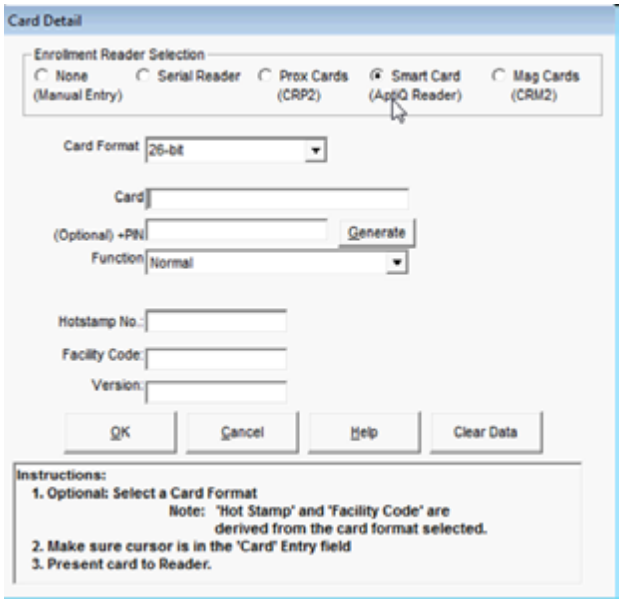
From here the user can Add, Find, Trash and Mark as Lost any Card (mag/prox/smart) credential in the system.

Add Card to the Stock List

An Enrollment Reader can be used to enter cards into the Stock List.

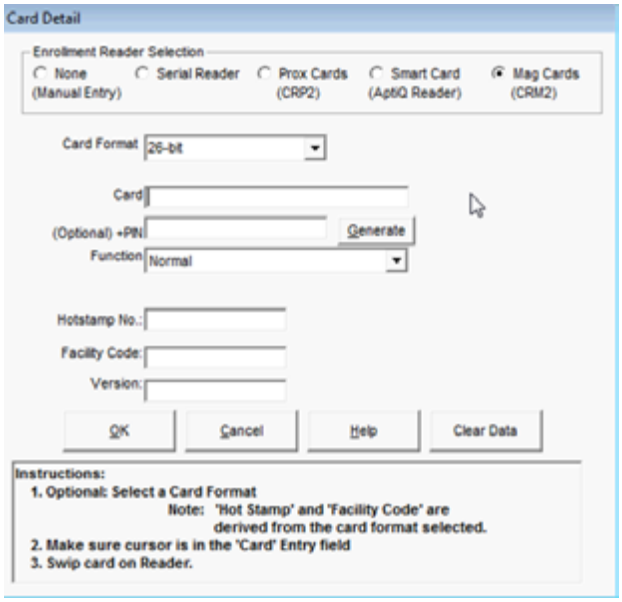
➔ For FIPS Compatible, skip this step. The MT20 enrollment reader will automatically add/remove cards to/from the stock list.

1. Click **Stock List > Cards**.
2. Click **Add**.
3. Instructions for each Enrollment Reader are included on the screen depending on the Enrollment Reader selected.
4. For Smart Card Enrollment:

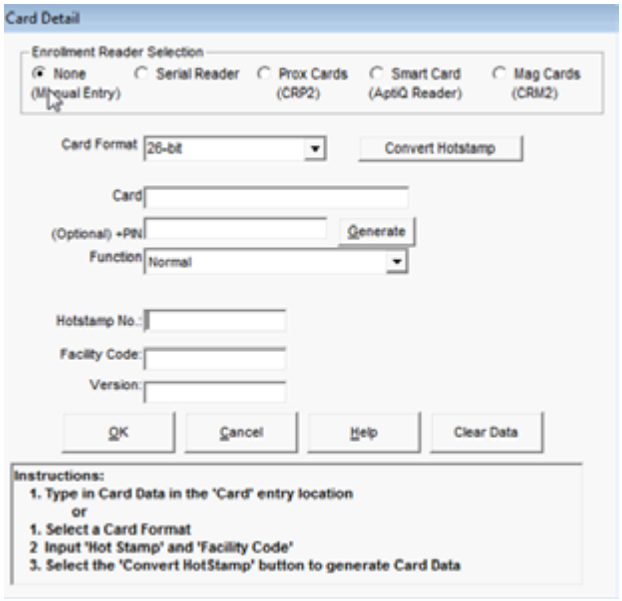


5. For a Serial Enrollment Reader:

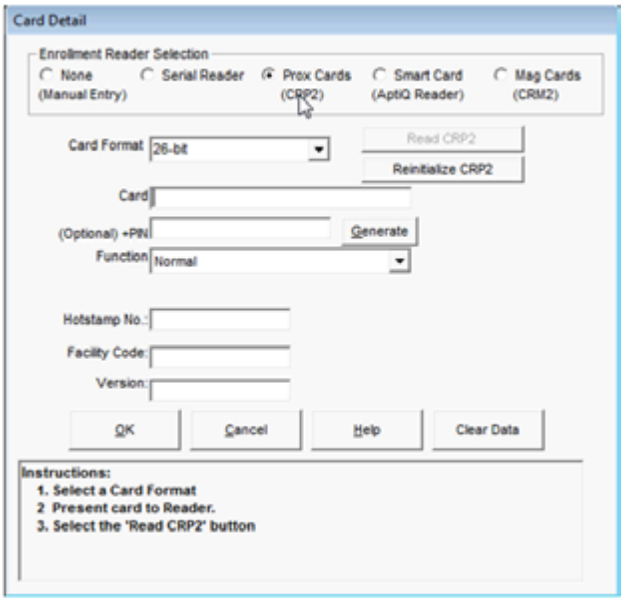
6. For a Mag Card USB Enrollment Reader



7. No Enrollment Reader (Manual)



8. For a Prox Card USB Enrollment Reader



9. Repeat the steps above for each additional card. If there are no more cards to be entered click **Cancel** in the newly opened **Card Detail** window.

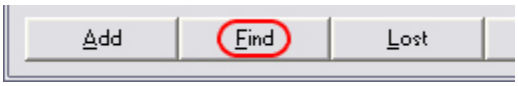
Find a Card in the Stock List

USB Enrollment Readers can be used to find cards in the Stock List.

➔ For FIPS Compatible, skip this step. The MT20 enrollment reader will automatically add/remove cards to/from the stock list.

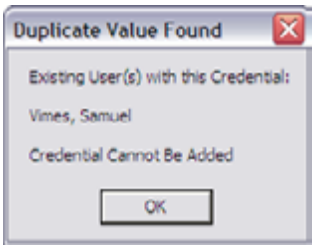
If using a Serial Enrollment Reader:

1. Click **Stock List > Cards**.
2. Click **Find**.



3. When the **Swipe Card** box appears, swipe the card you want to find in the system.

4. If the card is in use in the system, it will be displayed.
   - If the card is assigned to a user, the following box will appear. Click **OK** to close the box.
   - If the card is in the stock list, it will be highlighted in the stock list window.



If using an Enrollment Reader:

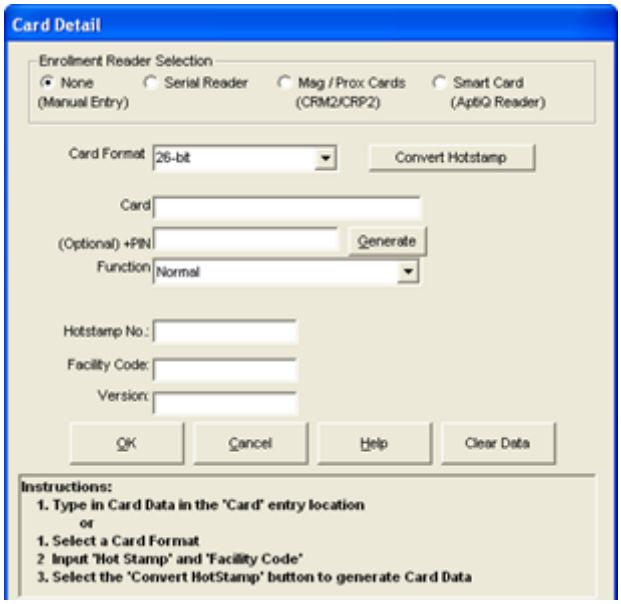
➔ This is the recommended method.

1. Click **Stock List > Cards**.
2. Click **Find**. The **Card Detail** window will open. If the card is in use in the system, it will be displayed.
3. For Smart Card Enrollment:

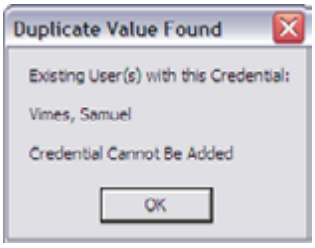
4. For a Serial Enrollment Reader

5. For a Mag/Prox Card USB Enrollment Reader:

6. No Enroll Reader (Manual)



7. If the card is assigned to a user, the following box will appear. Click **OK** to close the box.



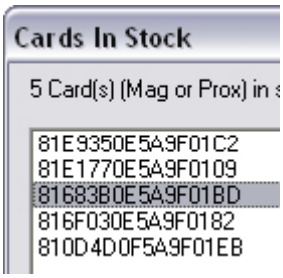
8. If the card is in the stock list, it will be highlighted in the stock list window.

Trash Cards in the Stock List

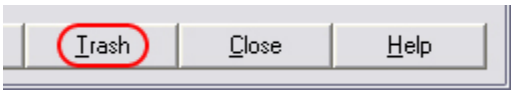
If a Card in the stock list stops functioning, the Card can me marked as trashed.

➔ For FIPS Compatible, skip this step. The MT20 enrollment reader will automatically add/remove cards to/from the stock list.

1. Click **Stock List > Cards**.
2. Click to select the number of the card you want to delete.

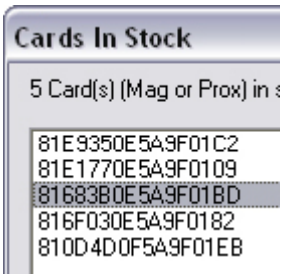


3. Click Trash.
4. Click Yes.

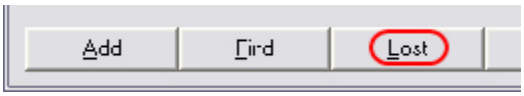


Mark a Card as Lost

1. Click **Stock List > Cards**.
2. Click to select the number of the card you want to mark as lost.



3. Click Lost.
4. Click Yes



Monitoring

Schlage Express can monitor all activities for the online devices. These devices are HandKey readers that are connected through a serial connection or to an Ethernet network.

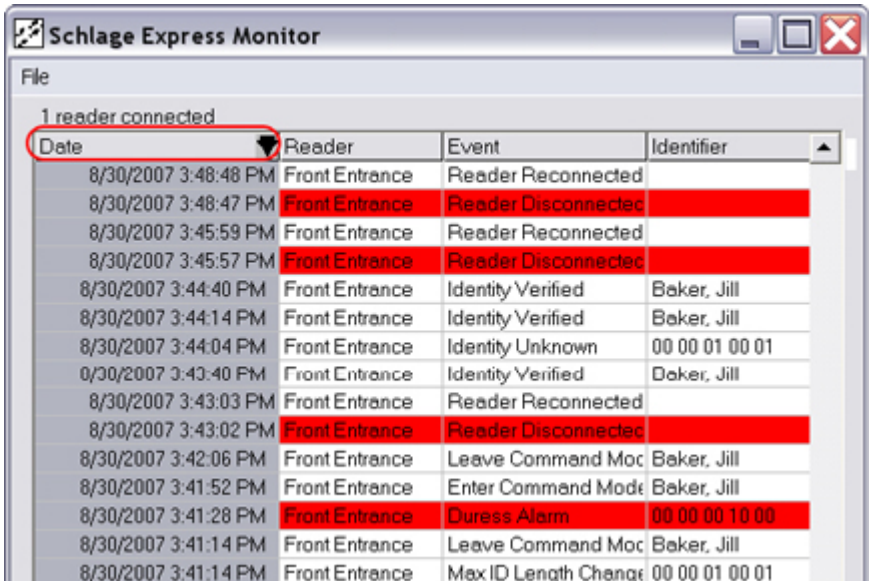
➔ Note: This option will only appear if you have the Handkey option checked under Program Settings. See **Program Settings** on page 33 for more information.

Start/Stop Monitoring

To Start Monitoring:

1. Click Monitoring > Start Monitoring.

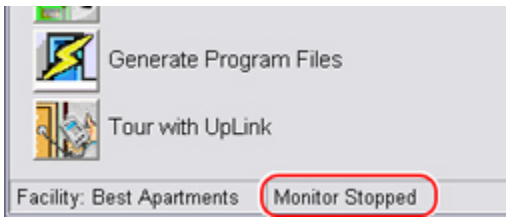
2. The Monitor Running will be displayed in the bottom right of the screen and the monitoring screen will appear. Any new events will be displayed in the monitoring screen.
3. Click on the title of any column to sort the list by that column. Click the same column again to change the sort order.



To Stop Monitoring:

1. Click Monitoring > Stop Monitoring.

2. Monitoring Stopped will be displayed in the bottom right of the main window.

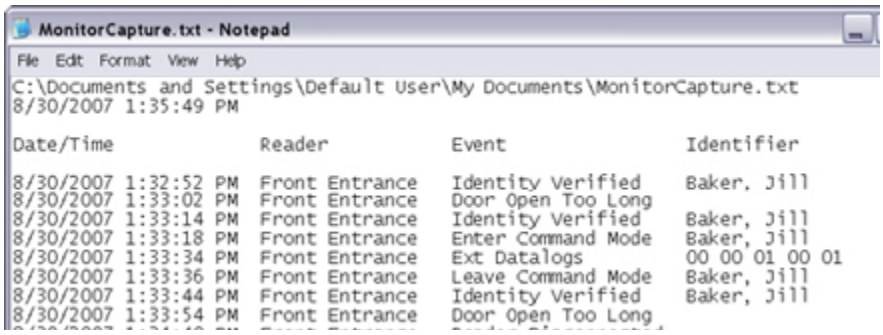


Save/Print Event List

To Save the Event List:

1. In the monitoring screen, click File > Save As.

2. Browse to the location on your computer to which you want to save the file.
3. Enter a name for the file into the File Name box.
4. Click Save.
5. The file can be viewed using any text editing software. Navigate to the location on your computer to which you save the file and double-click to open the file. This is an example of a saved event list.



To Print the Event List:

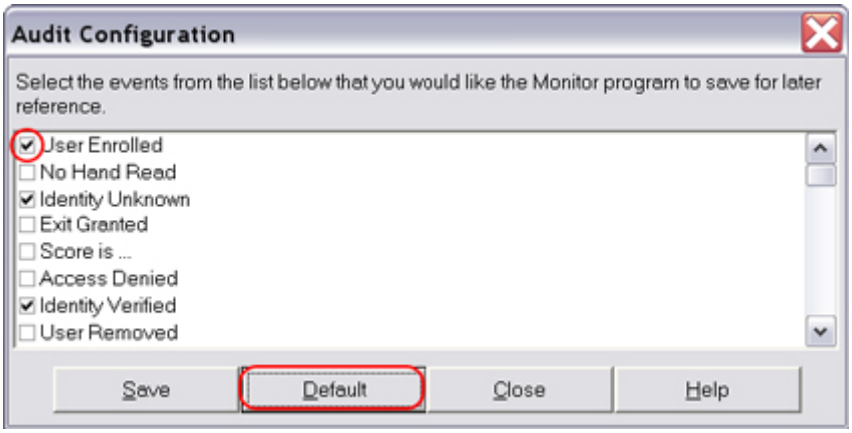
1. In the monitoring screen, click File > Print.
2. Click to select the printer to which you want to print from the list of installed printers.
3. Click Print.

Select Audit Events to Save

Select Audit Events to Save is used to select the events that will be saved in the audit for each online door. See **Audits** on page 65 for more information.

1. Click Monitoring > Select Audit Events to Save.

2. Click to check/uncheck the check boxes next to the events you want to save in the audit report. Click Default to automatically select the default set of events.
3. Click Save.
4. Click Close.



Audits

An audit is a list of events for one or more doors.

An audit event is any event that occurs at a door. Audit events are recorded in an audit.

An audit trail is a list of audit events. An audit trail can be retrieved from a locking device that is equipped with the audit trail feature or the SmarTime feature.

Audits can be viewed using the audit viewer in Schlage Express.

Viewing Audits

To View an Audit:

1. Click Audits.
2. Then select the viewing parameter. Audits can be viewed by:
   - Door and Date - The report viewer will be displayed with the audit by door and date already loaded.
   - Door and User - The report viewer will be displayed with the audit by door and user already loaded.
   - User and Date - The report viewer will be displayed with the audit by user and date already loaded.
   - Date - The report viewer will be displayed with the audit by date already loaded.
3. The report viewer will open with the selected criteria. See **Reports** on page 66 for more information.

Audits

Reports

An audit trail from any lock in the system can be viewed using the report viewer. When a report is viewed, a new file is created from the most recent audit trail that exists in the system.

View Saved Reports

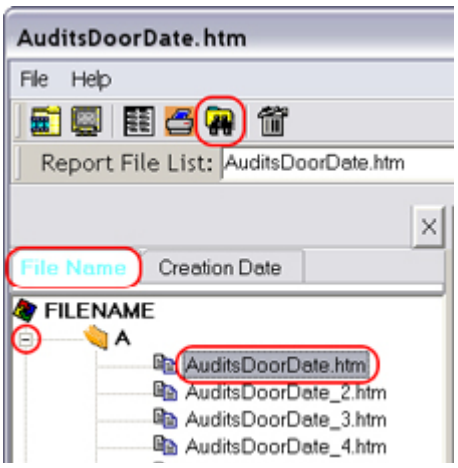
Reports that have been previously created can be viewed using the report viewer.

1. Click Reports > View Saved Reports.

   Reports can be found in three ways:

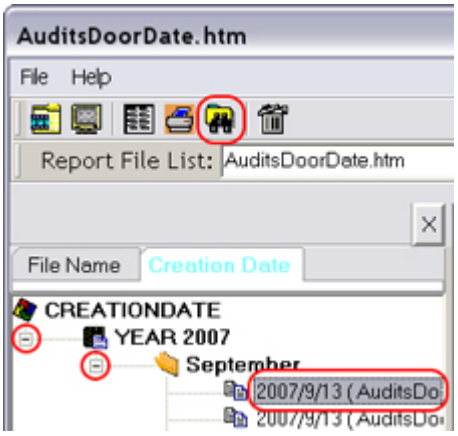
Search by File Name

1. Click the search button.
2. Click File Name.
3. Click + to expand the folder of the first letter of the file name you want to view.
4. Click the name of the file you want to view.



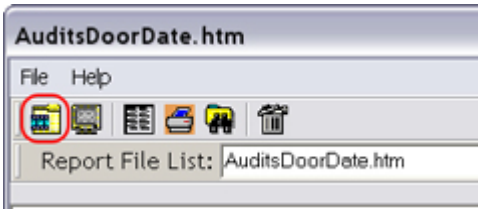
Search by Creation Date

1. Click the search button.
2. Click Creation Date.
3. Click + to expand the folder for the year you want to view.
4. Click the date of the file you want to view.



Browse for a Saved File

1. Click the open file button.
2. Browse for a file that has been saved on your system.
3. Click to select the file and click Open.



View a Report

1. Click Reports.
2. Choose one of the following:
   - User > Name Phone Address
   - Door
   - Holidays by Door
   - AutoUnlocks by Door
   - Access by User
   - Access by Door
   - Issued Credential History

These reports can be sorted and printed to meet your requirements.

Delete a Report

➔ Note: Reports should not be deleted. Report files are regenerated after being deleted, so no disk space is saved by deleting report files. Some problems, such as 'file not found' errors, may be encountered if report files are deleted.

1. Click Reports > View Saved Reports.
2. Click the search button.
3. Click File Name.
4. Click + to expand the folder of the first letter of the file name you want to delete.
5. Click the name of the file you want to delete.
6. Click the trash can button.
7. Click Yes.

SmarTime (SMT)

SmarTime is a collection of time-based functions that allow locks to behave differently based on time restrictions. SmarTime functions include User Time Zones, Door AutoUnlocks and Door Holidays.

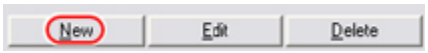
User Time Zones

A user time zone is a defined period of time that is assigned to an access right in order to grant access to users. This is different from a world time zone such as Mountain Standard Time.

The 24Hr X 7 Days (Default) user time zone is created, by default, in every facility. This user time zone cannot be deleted or edited. It is used by every lock that supports user time zones to give 24 X 7 access. Any time an access right is assigned to a door that supports user time zones, this user time zone is used unless another user time zone is assigned.

Add a User Time Zone

1. Click SmarTime (SMT).
2. Click New.



3. Enter the name in the Name box.
   - A name is required and must be between one (1) and thirty-two (32) characters long. The name cannot contain the tab character or the pound (#) sign.

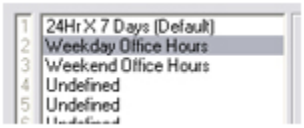
4. Set the Start Time and the End Time.
   - The time boxes are divided into four parts: hour, minute, second and day part. To enter the time, click on the time part you want to change. Then either type the value or use the arrow buttons on the right of the time box to increase or decrease the time.

5. Check the box below each day of the week for which the user time zone will be in effect.

6. Click Save.

Edit a User Time Zone

1. Click SmarTime (SMT).
2. Click to highlight the name of the user time zone you want to edit.



3. Click Edit.
4. Enter the name in the Name box.
   - A name is required and must be between one (1) and thirty-two (32) characters long. The name cannot contain the tab character or the pound (#) sign.

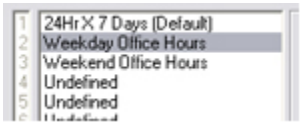
5. Set the Start Time and the End Time.
   - The time boxes are divided into four parts: hour, minute, second and day part. To enter the time, click on the time part you want to change. Then either type the value or use the arrow buttons on the right of the time box to increase or decrease the time.

6. Check the box below each day of the week for which the user time zone will be in effect.

7. Click Save.

➔ NOTE: The user time zone will not be changed on the door until the door is reprogrammed.

Delete a User Time Zone



➔ NOTE: The 24Hr X 7 Days (Default) user time zone cannot be deleted.

1. Click SmarTime (SMT).
2. Click to highlight the name of the user time zone you want to delete.
3. Click Delete.
4. Click Yes.

➔ The user time zone will still be active on the door until the door is reprogrammed.

Door AutoUnlocks

An AutoUnlock is a defined time period during which a lock is unlocked. At the end of the AutoUnlock time period, the lock will automatically relock.

No audit events of legal access are logged during an AutoUnlock time period. Only the start and end of the AutoUnlock will be logged.

AutoUnlocks are overridden by holidays. Up to eight (8) door AutoUnlocks can be added to a facility. Not all locks support AutoUnlocks.

Secured Mode AutoUnlock

If an AutoUnlock has the same start and end time, the lock will be set to secure (locked) mode at that time. Using this technique, you can make sure that a lock is locked from a specific time of day until it is unlocked by either a user, another AutoUnlock or a holiday.

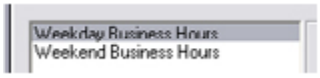
Add a Door AutoUnlock

1. Click SmarTime (SMT).
2. Click Door AutoUnlocks.
3. Click New.
4. Enter the name in the Name box.
   - A name is required and must be between one (1) and thirty-two (32) characters long. The name cannot contain the tab character or the pound (#) sign.
5. Set the Start Time and the End Time.
   - The time boxes are divided into four parts: hour, minute, second and day part. To enter the time, click on the time part you want to change. Then either type the value or use the arrow buttons on the right of the time box to increase or decrease the time.

6. Check the box below each day of the week for which the user time zone will be in effect.

7. Click Save.
8. If you have entered the same time for the start and end times, a window will appear to confirm the creation of a secured mode AutoUnlock. If you intended to create this kind of AutoUnlock, click OK. If you did not intend to create this kind of AutoUnlock, click Cancel and go back to step 5.

Edit a Door AutoUnlock



1. Click SmarTime (SMT).
2. Click Door AutoUnlocks.
3. Click to highlight the name of the door AutoUnlock you want to edit.
4. Click Edit.

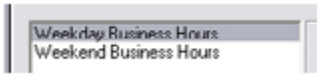
5. Enter the name in the Name box.
   - A name is required and must be between one (1) and thirty-two (32) characters long. The name cannot contain the tab character or the pound (#) sign.
6. Set the Start Time and the End Time.

   - The time boxes are divided into four parts: hour, minute, second and day part. To enter the time, click on the time part you want to change. Then either type the value or use the arrow buttons on the right of the time box to increase or decrease the time.
   - If the start time and the end time are the same, the lock will be set to secured mode (locked) at that time.
7. Check the box below each day of the week for which the user time zone will be in effect.

8. Click Save.
9. If you have entered the same time for the start and end times, a window will appear to confirm the creation of a secured mode AutoUnlock. If you intended to create this kind of AutoUnlock, click OK. If you did not intend to create this kind of AutoUnlock, click Cancel and go back to step 5.

➔ NOTE: The AutoUnlock will not be changed on the door until the door is reprogrammed.

Delete a Door AutoUnlock



1. Click SmarTime (SMT).
2. Click Door AutoUnlocks.
3. Click to highlight the name of the door AutoUnlock you want to delete.
4. Click Delete.
5. Click Yes.

➔ NOTE: The AutoUnlock will still be active on the door until the door is reprogrammed.

Door Holidays

A holiday is a defined time period during which a door remains in a secure, secured lockout or passage state. A holiday can span over an unlimited amount of time and is non-repeatable.

Holidays override AutoUnlocks. Up to sixteen (16) door holidays can be added to a facility. Not all locks support holidays

Add a Door Holiday

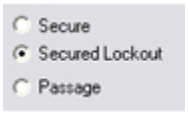
1. Click SmarTime (SMT).
2. Click Door Holidays.
3. Click New.
4. Enter the name for the door holiday.
   - A name is required and must be between one (1) and thirty-two (32) characters long. The name cannot contain the tab character or the pound (#) sign.
5. Set the Start Time and the End Time.
   - The date boxes are divided into three parts: month, day and year. To enter the date, click on the date part you want to change and type the value.
   - The date can also be chosen by clicking the down arrow on the right side of the date box. A calendar pop-up box will appear. Change the month by clicking the left or right arrow at the top of the box. Choose the date by clicking on the number in the calendar.
   - The time boxes are divided into four parts: hour, minute, second and day part. To enter the time, click on the time part you want to change. Then either type the value or use the arrow buttons on the right of the time box to increase or decrease the time.
6. Choose the function for the holiday by clicking the radio button next to the desired function. Only one function for holiday can be chosen.
   - Secure - Secure is a mode that sets the door to the locked state. A user who has access rights and a valid credential can unlock a door set to secure mode. The door will re-lock after the specified relock time.
   - Secured Lockout - Secured lockout is a mode that sets the door to the locked state and locks out all credentials except pass through credentials. A user who has access rights and a valid pass through credential can unlock a door set to secured lockout mode. The door will re-lock after the specified relock time.
   - Passage - Passage is a mode that sets the door to the unlocked state. Any person can open a door with a lock set to passage mode. The door can be locked, and will remain locked, with a toggle credential.
7. Click Save.

Edit a Door Holiday

1. Click SmarTime (SMT).
2. Click Door Holidays.
3. Click to highlight the name of the door holiday you want to edit.
4. Click Edit.

5. Edit the name in the Name box.
   - A name is required and must be between one (1) and thirty-two (32) characters long. The name cannot contain the tab character or the pound (#) sign.
6. Set the Start Time and the End Time.

   - The date boxes are divided into three parts: month, day and year. To enter the date, click on the date part you want to change and type the value.
   - The date can also be chosen by clicking the down arrow on the right side of the date box. A calendar pop-up box will appear. Change the month by clicking the left or right arrow at the top of the box. Choose the date by clicking on the number in the calendar.
   - The time boxes are divided into four parts: hour, minute, second and day part. To enter the time, click on the time part you want to change. Then either type the value or use the arrow buttons on the right of the time box to increase or decrease the time.
7. Choose the function for the holiday by clicking the radio button next to the desired function. Only one function for holiday can be chosen.



   - Secure - Secure is a mode that sets the door to the locked state. A user who has access rights and a valid credential can unlock a door set to secure mode. The door will re-lock after the specified relock time.
   - Secured Lockout - Secured lockout is a mode that sets the door to the locked state and locks out all credentials except pass through credentials. A user who has access rights and a valid pass through credential can unlock a door set to secured lockout mode. The door will re-lock after the specified relock time.
   - Passage - Passage is a mode that sets the door to the unlocked state. Any person can open a door with a lock set to passage mode. The door can be locked, and will remain locked, with a toggle credential.
8. Click Save.

➔ NOTE: The door holiday will not be changed on the door until the door is reprogrammed.

Delete a Door Holiday

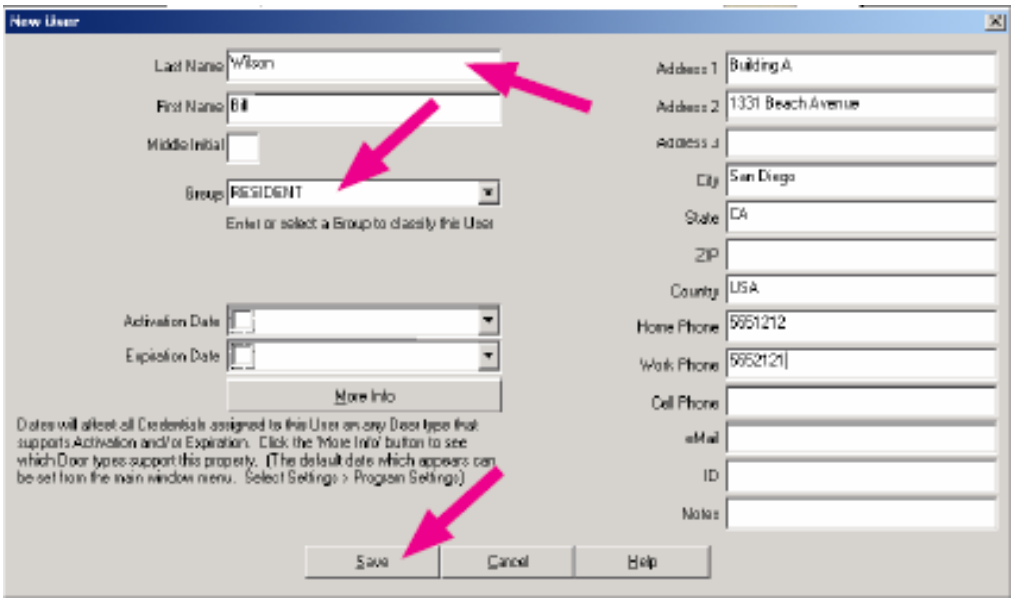
1. Click SmarTime (SMT).
2. Click Door Holidays.
3. Click to highlight the name of the door holiday you want to edit.
4. Click Delete.
5. Click Yes.

➔ NOTE: The door holiday will not be changed on the door until the door is reprogrammed.

Users

Adding a User

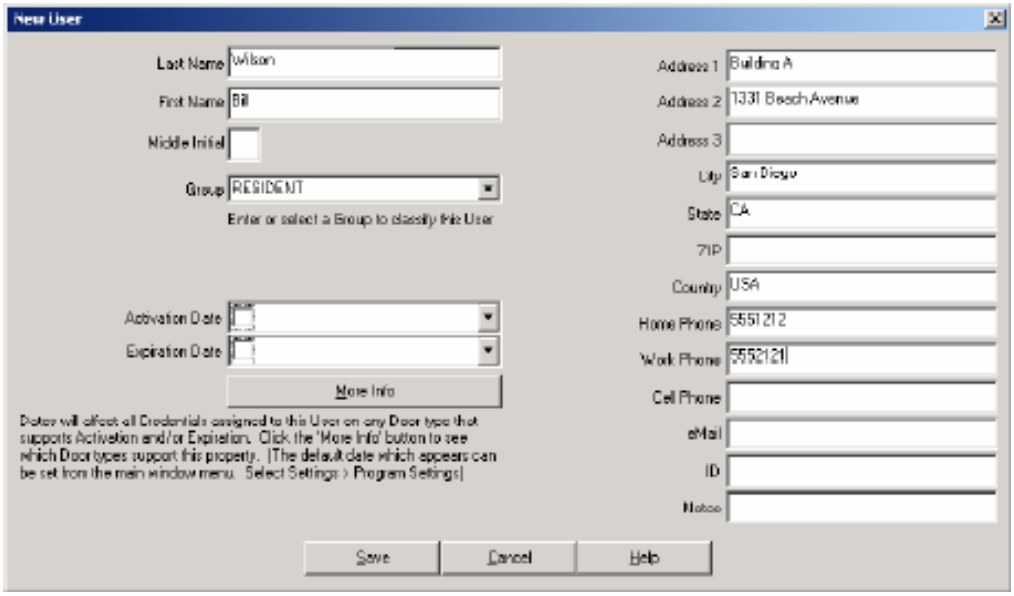
Create a user record so you can assign a credential to a new user. A user is anyone assigned a credential to operate specific doors locks.



1. Click Users in the Main Window:
2. Click New at the bottom of the left pane:
3. Enter up to 16 characters each for the Last Name and First Name fields (the other fields are optional):
    - Assign users to groups by entering a group name in the Group field. It's easier to manage multiple users when they're assigned to a group. If multiple groups are currently available in the Group dropdown list, make sure all new users are assigned to the proper group. Speak with your site administrator if you are unsure what to select.
4. Click Save to save the new record.
5. Click Close to return to the Main Menu.

Editing a User

Keep user information up to date by editing the user entry. When a resident moves out and returns all credentials, edit the user entry so that it shows information for the new resident.

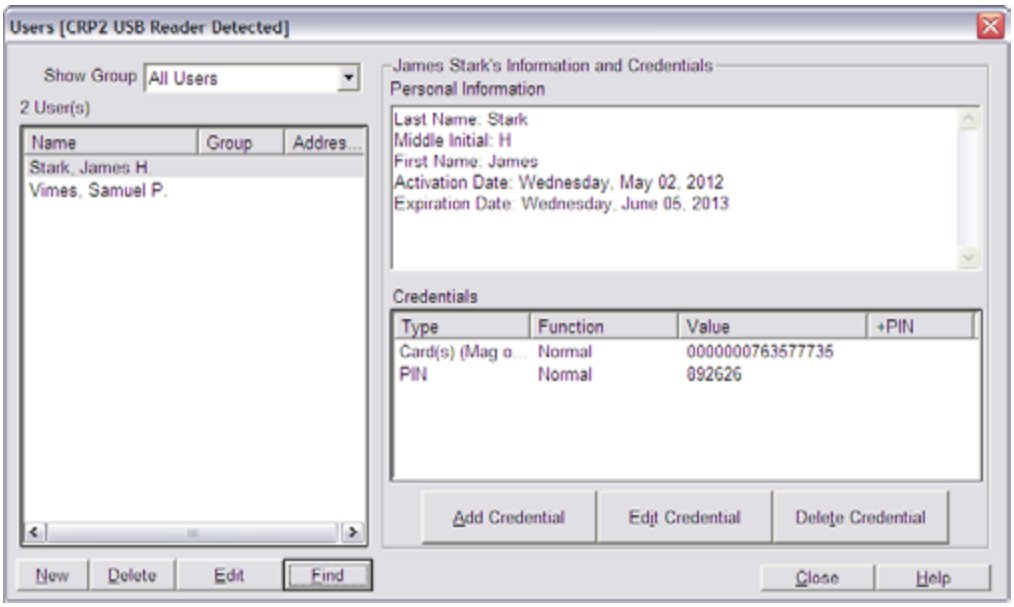


1. Click Users in the Main Window.
2. Click Edit at the bottom of the left pane.
3. Modify values of any fields.
4. Click Save to save the new record.
5. Click Close to return to the Main Menu.

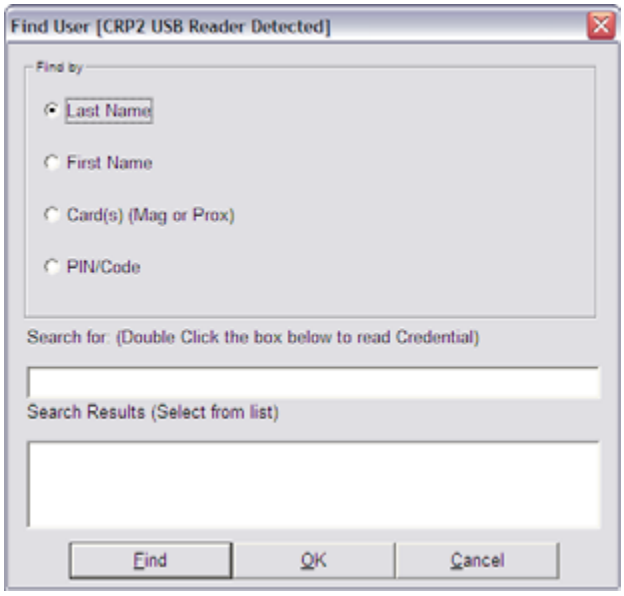
Finding a User

To find a User in the system, follow the steps below.

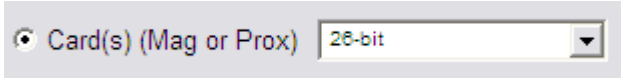
1. Click Users in the Main Window.
2. Click Find.



3. The Find User window will open. Select the Find by option.
4. If searching using a name (First or Last) or the PIN/Code enter the name or PIN into the Search for field.
   a. Click Find. All applicable users will appear in the Search Results List.
   b. Select the desired user in the Search Results List and click OK. The Find User window will close and the Users window will show the selected User.



5. If searching for a Card using a Reader:
   a. Use the format select drop down menu to select the card format.
   b. Double click the Search for field.
   c. Present the card to the reader.
   d. After a few seconds the Find User window will close and the Users window will show the selected User.

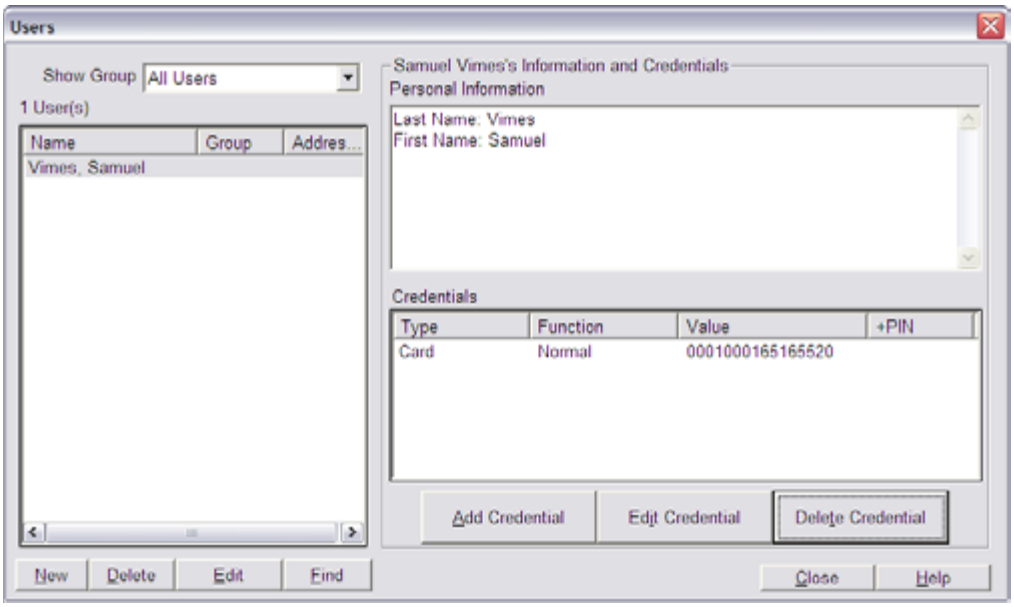


6. If searching for an iButton using a Reader:
   a. Double click the Search for field.
   b. Present the iButton to the reader.
   c. After a few seconds the Find User window will close and the Users window will show the selected User.

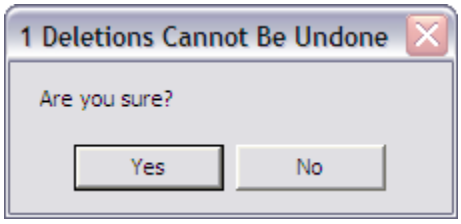
Deleting a User

Delete a user to remove old records.

1. Click Users in the Main Window

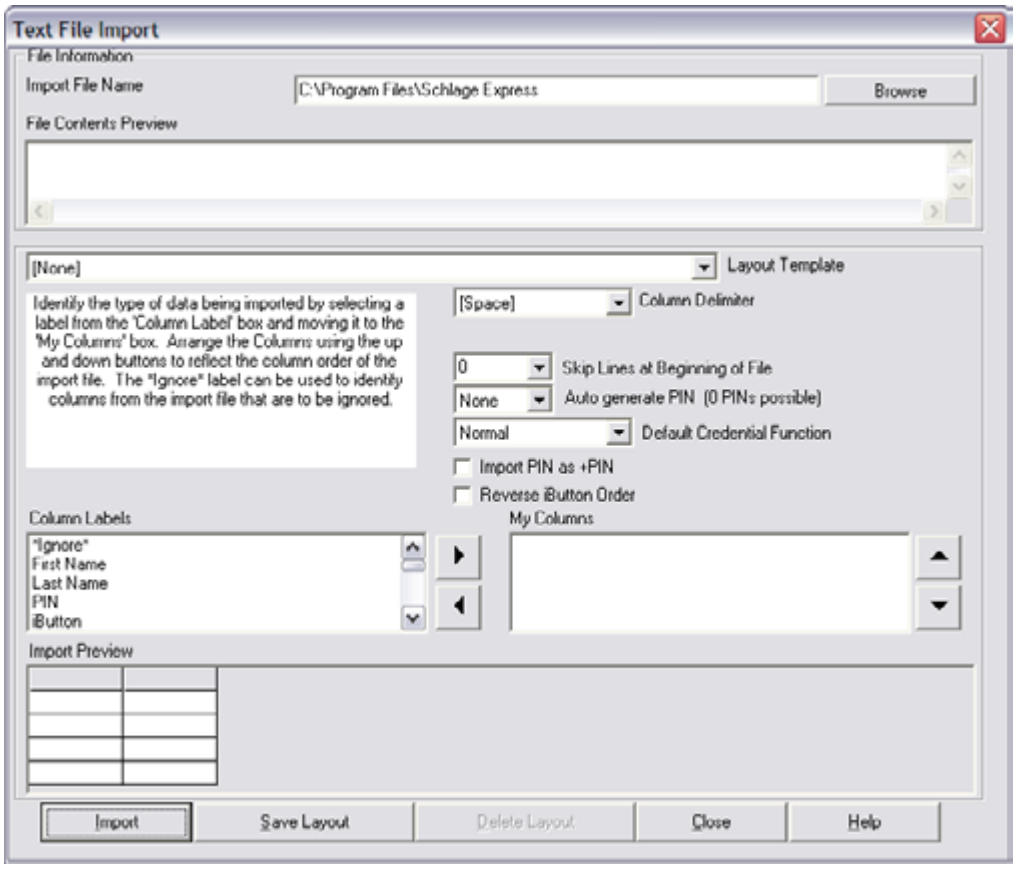


2. Select one user in the left pane and click Delete:
   - ➔ NOTE: When you delete a user assigned to a credential, you will be prompted to delete the credential. See **Credentials** on page 85 for more information.
3. Click Yes to confirm the deletion of the user.
4. Click Close to return to the Main Menu.



Importing Users from Text File

The Text File Import option allows a large number of users to be added to the system at once by importing a text (.txt) file containing the User Information. To access the Text File Import option go to the main page and click on Facility>Import>User Import from Text File.



File Information

Import File Name: Shows the name and location of the Import File.

Browse: Click this button to browse your computer for the Import Text File. (Only .txt files accepted)

File Contents Preview: This window will show the contents of the selected Text File. This allows the operator to see the format of the text file without having to open the file in a separate window.

Layout Template: Use this drop down menu to select a layout template to use.

Column Delimiter: Use this to select how the information in the text file is separated.

Skip Lines at Beginning of File: Use this to select how many lines, if any, should be skipped at the beginning of the text file. This is used to skip any non-user information such as titles or headings that do not need to be imported.

Auto Generate PIN: Select this option if you wish the system to generate a PIN number for each user being imported.

Default Credential Function: Select the credential function (Normal, Toggle, etc) for the imported Users. This setting will be applied to all users being imported.

Import PIN as +PIN: If using the +PIN option, select this to import any PIN numbers as a Credential +PIN option.

Column Labels: This section shows all the system options for User information. This will automatically populate with all the options available to a user in this system. Only the credential types that have been selected in the Settings section will be shown.

My Columns: This section shows the columns that are defined by the Operator. See **How to Import Users** on page 59 for more information.

Import Preview: This section shows a preview of how the user information will be imported by the system, according to your settings. See **How to Import Users** on page 59 for more information.

Import: Click this to start the Import.

Save Layout: Click this to save the current layout to the system. This layout can then be used later in the Layout Template section.

Delete Layout: Click this to delete the current layout.

Close: Click this to close the Text File Import window. All unsaved data will be lost.

Help: Click this to open the help file.

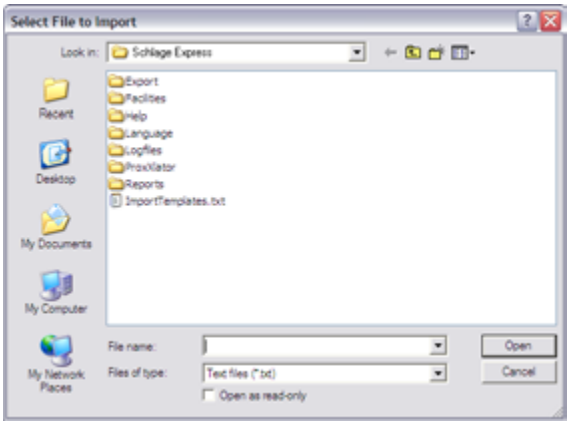
How to Import Users

To import a list of users into Schlage Express a text (.txt) file must first be created with the user information. This file can have any information that is found in the Users Definition section. Any additional information can be ignored. User information in the text file can be delineated by a space, a tab, a colon, semi-colon, or any other Operator defined ASCII character (not including any alphanumeric values or the apostrophe).

In the example below a text file with information delineated by tab is being used.

To import a text file:

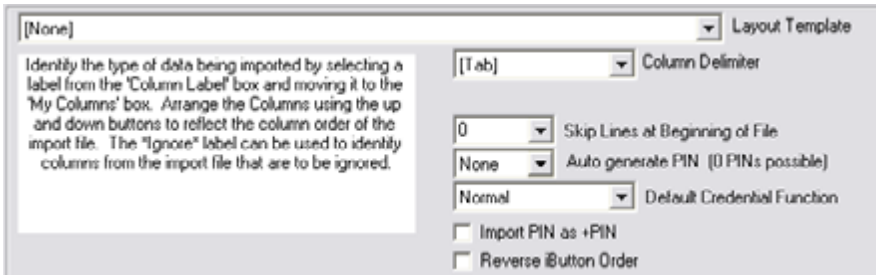
1. On the Main page of Schlage Express go to Facility>Import>User Import from Text File. The **Select File to Import** window will open.
2. Click the Browse button to open the Select File Import window.
3. Navigate to the text file and click **Open**.



4. The Select File window will close and the text file will be previewed in the **File Contents Preview** section.

5. OPTIONAL: At this point if a Layout Template has been created it can be selected using the Layout Template drop down box. A Layout Template will set all the other options (Column Delimiter, Skip Lines, Auto Generate PIN, Column Order, etc.) in the Text Import File utility. Layout Templates can save time and should be considered if a lot of importing from different .txt files, all with the same layout, is being done.

   ➔ In this example a layout template will not be used so the [None] option will be selected.



6. Use the Column Delimiter drop down to select how the information is delimited in the text file.

   ➔ In this example the information is delimited with a Tab so the [Tab] option will be selected.

7. Use the Skip Lines at Beginning of File drop down to select how many lines, if any, need to be skipped at the top of the text file.

   ➔ In this example there are no lines that need to be skipped so the 0 option will be selected.

8. Use the Auto generate PIN drop down if you wish the system to assign a PIN number to each user being imported. Select how many digits the PIN will have.

   ➔ In this example we are not using PIN numbers so the 0 option will be selected.

9. Use the Default Credential Function drop down to assign a specific Credential Function (Normal, Toggle, One Time Use, etc.) for all the users being imported.

   ➔ In this example we are assigning Normal function to all users so the Normal option will be selected.

10. Click the Import PIN as +PIN if you wish any PIN numbers being imported to be part of a Credential +PIN setup.

    ➔ In this example we are not using the +PIN option so this option will remain unchecked.

11. Now the Column order must be defined in the system. Look at either the File Contents Preview section or at the original text file to see what order the information is given.

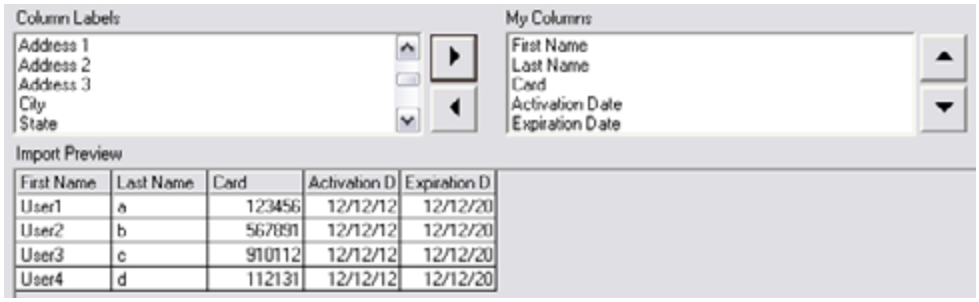
    ➔ In the example we're using the information is given in the order of First Name, Last Name, Card, Activation Date and Expiration Date.

12. Go to the Column Labels section and select the first column of information. Select that column and click on the button. The selected column will now populate the My Columns field (and be removed from the Column Labels field) and the Import Preview section will show the first column information.

    ➔ In the example we're using the first column is First Name.

13. Repeat the above step for each column in use.

    ➔ For our example we get the following results:

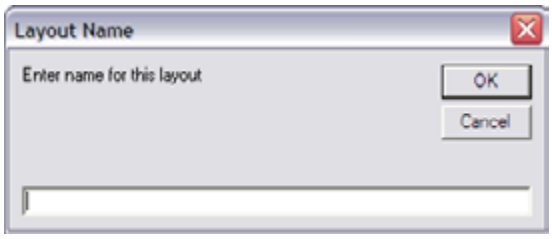


14. OPTIONAL: If you wish to use this Import Layout again, click Save Layout to save it. The Layout Name window will open.

    a. Enter the name of the Layout in the field provided.

    b. Click OK. The Layout Name window will close and the layout will be saved.

15. To Import the file click Import. The Importing Users window will open and then close once the import is complete. The imported users can now be viewed in the User section of Schlage Express.



➔ Note: If there are any errors in the import process an Error window will open and the files will not be imported.

Credentials

Credentials are used to gain access to a door. Credentials can be PINs, Card (Mag, Prox or Smart), iButton or an RSI Hand reader.

Credential Types

PIN: This is the only logical credential available. A PIN is simply a sequence of numbers and does not require a device. A PIN is easy to create, has no expense associated with it, but is not very secure. PIN is an acronym for Personal Identification Number.

iButton: An iButton is a microchip in a battery case. Each chip has a unique serial number that is used for identification. iButtons are very durable, moderately priced and secure. iButtons can be combined with PINs when the associated hardware provides this feature.

Card (Mag or Prox): Mag Card - Mag Card is a short term for magnetic stripe card. Mag Cards are low cost and secure, but are susceptible to magnetic fields.

Prox Card: Prox Card is short for Proximity Card. Prox cards are also available as fobs. Prox cards are more expensive than mag cards but usually perform better, are not susceptible to magnetic fields and are just as secure.

Smart Cards: These cards are the most secure form of credential because they have 2-way communication between card and reader. They operate at the 13.56 MHz frequency. Some examples of these cards include Mifare Classic, Mifare Desfire EV1, and PIV cards.

RSI Hand: An RSI Hand is the only biometric credential available. Hands are always combined with a PIN. The PIN can be encoded on a card (mag or prox). Hands have the highest available security level at no incremental cost.

Credential Functions

Normal: A normal credential opens a door for a specified time. The time span is defined by the relock delay. The normal function works on all devices.

Toggle: A toggle credential opens a door and leaves it open until it is closed again by a toggle credential. It toggles a door between locked and unlocked.

Freeze: A freeze credential disables the credential reader. After a freeze credential has been used on a lock, only a pass through credential will operate the lock. Present a freeze credential to return the lock to an operational state.

One Time Use: A onetime use credential opens a door only once with the normal function. Once a onetime use credential has been used on a door, it will no longer work on that door. It can still work on other doors, to which is has been assigned.

Dogged: Dogged is a credential functions that keeps the push pad pushed in and the door unlocked only on electronic dogging bars. A dogged credential works as a normal credential on all other devices.

Pass Through: A pass through credential will always unlock a lock that is in secured lockout mode, regardless of how the lock was put in secured lockout mode.

Delete with Audit/Alarm: A delete with audit/alarm credential will log an audit entry that the credential was used. However, the credential will NOT unlock the door. If an alarm is available on the lock, then the alarm will sound.

CT Aux: A CT Aux credential operates the auxiliary relay of a CT Controller, but not the main relay. The time span the relay is activated is specified by the relock delay.

CT main and Aux: A CT Main and Aux credential operates both the auxiliary relay and main relay of a CT controller. The time span the relays are activated is specified by the relock delay.

FIPS Compatible

Card + PIN is FIPS Compatible.

Card only or PIN only is not FIPS Compatible.

If you want to use card only or PIN only, you must change the FMK reader on the AD-201 to the MTK reader and change the class of the AD-series lock to AD-200 instead of AD-201. Both AD-200 and AD-201 are capable of reading PIV cards in several different card formats.

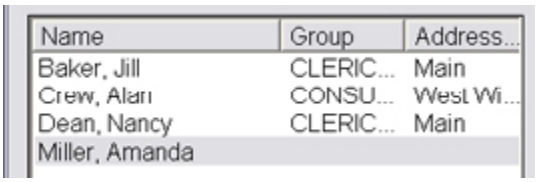
Connect the MT20 Reader before continuing.

Adding a Credential

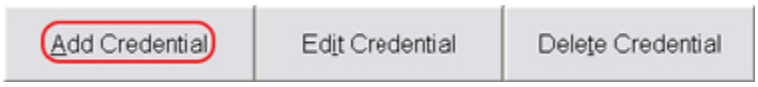
➔ For FIPS compatibility, connect the MT20 Reader before continuing.

1. Click Users.

2. Click to highlight the name of the user to which you want to add a credential.



3. Click **Add Credential**.
4. Select the type of credential you want to add from the following:



PIN

a. Click the PIN radio button.
b. Click OK.
c. Enter a PIN number or click Generate to have the system generate a PIN.
d. Select the function from the Function drop-down box.
e. Click OK.

iButton

a. Click the iButton radio button.
b. Click OK.
c. Do one of the following:

Select an iButton from the stock list:

a. Click Yes in the Credentials Available window. If the Credentials Available window did not appear, then no iButtons are available in the stock list. Proceed to the instructions for Add a new iButton below.
b. Click to highlight the number of the iButton you want to add OR click Find and touch the iButton you want to find to the iButton reader.
c. Click Select

Add a new iButton:

a. Click No in the Credentials Available window (if it is visible).
b. Click Read.
c. Touch the iButton you want to add to the iButton reader.
d. To add an optional +PIN, enter the +PIN in the (Optional) +PIN box, or click Generate to have the system generate a +PIN.
e. Select the function from the Function drop-down box.
f. Click OK.

Card(s) (Mag, Prox, or Smart)

a. Click the Card(s) radio button.
b. Click OK.
c. Do one of the following:

Select a mag, prox, or smart card from the stock list:

a. Click Yes in the Credentials Available window. If the Credentials Available window did not appear, then no cards are

available in the stock list. Proceed to the instructions for Add a new Mag, Prox, or Smart Card below.

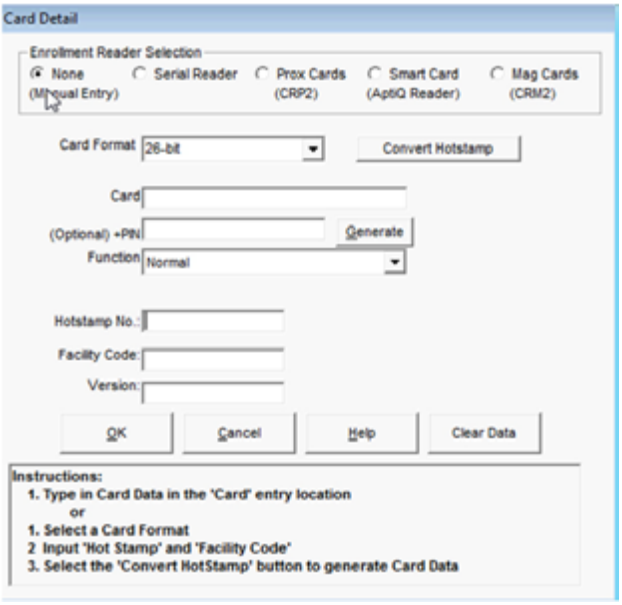
b. Click to highlight the number of the mag, prox, or smart card you want to add OR click Find and present the card you want to find to the mag, prox, or smart card reader.

c. Click Select

Add a new Card:

a. If using an Enrollment Reader to enter cards see **See Using an Enrollment Reader on page 64 for more information.**.

b. No Enrollment Reader (Manual): Select “None” in the Enrollment reader section and follow the instructions in the box below, as shown in the example.



RSI Hand

a. Click the RSI Hand radio button.

b. Click OK.

c. Click Read.

d. Follow the prompts on the HandKey II screen. Once the user is successfully enrolled, the HandKey Template box will display Enrolled.

e. Do one of the following:

- Type the PIN number into the Card or PIN box.
- Click Read to have the system generate a PIN for you.
- Click Read to enter a Card and then present the card to the card reader.

f. Select the function from the Function drop-down box.

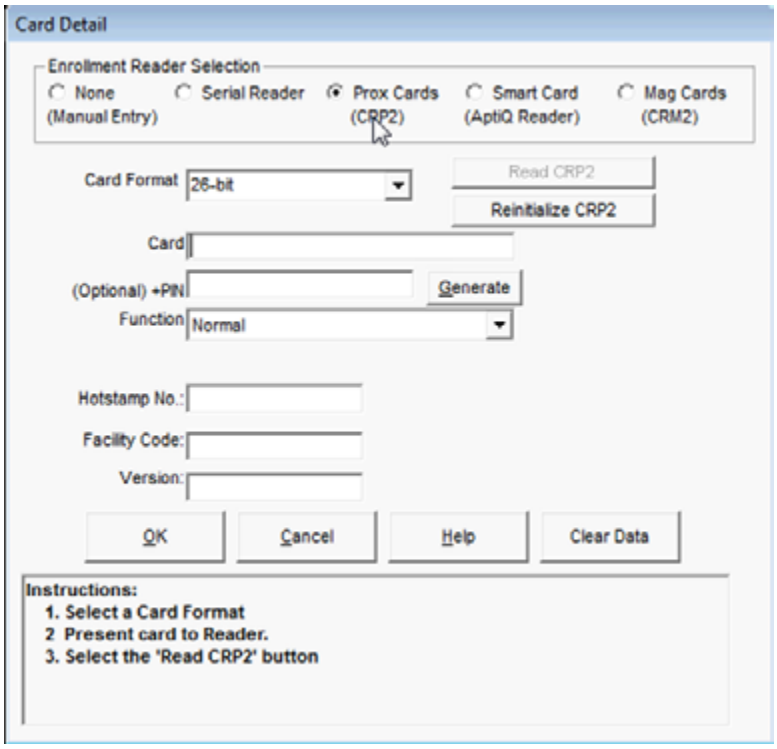
g. Select the menu access level from the Menu Access drop-down box - Consult the HandKey II User Manual for more information.

h. Select the reject threshold from the Reject Threshold drop-down box - Consult the HandKey II User Manual for more information.

i. Click OK.

Using an Enrollment Reader

After creating a cardholder, you can pre-populate the credential information using an enrollment reader. Schlage Express supports the CRM-2 Magnetic Stripe Enrollment Reader, the CRP-2 Proximity Enrollment Reader, and the APTIQ SMART Card Enrollment Reader.

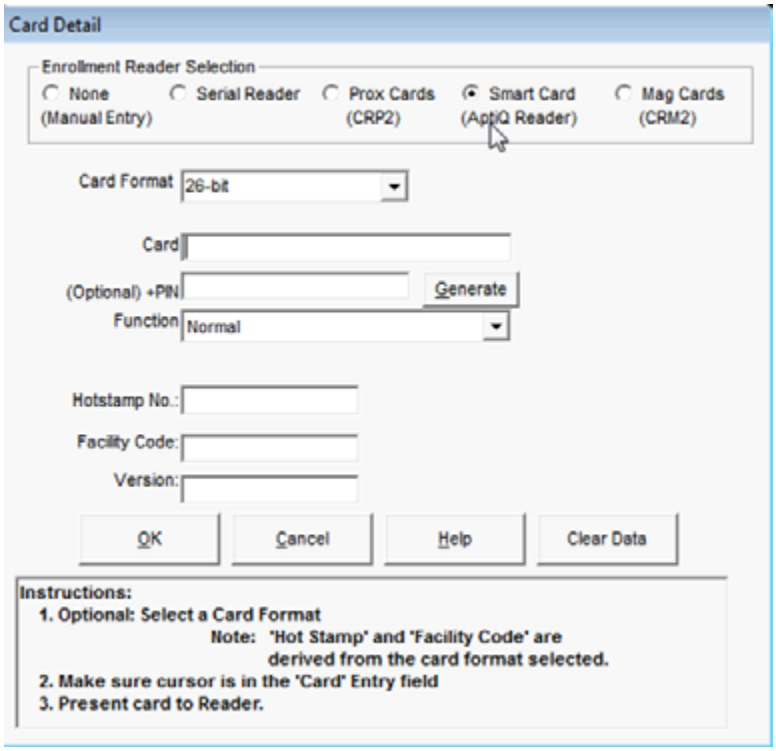


Using CRP-2 Proximity Enrollment Reader:

1. Connect your CRP-2 to your USB port and launch the Card Detail Window by clicking on the Add Credential button in the Users Window.
2. If you are already in the Card Detail window when you connect your enrollment reader, you may need to click the Reinitialize pcProx button.
3. You will know that Schlage Express has successfully connected to the enrollment reader as the Read USB button will be enabled. If Schlage Express cannot find the enrollment reader, the Read USB button will be disabled:

   ➔ Note: Before you read a card you will need to know how many bits and what format card you have.
4. Select the correct card format from the Card Format drop down menu and present your card to the enrollment reader. The reader will beep and the LED will turn green for 10 seconds.

   ➔ Note: During the 10 second period in which the LED is green if a card is presented it will reset the 10 second timer. The LED must turn red before a new card can be presented.
5. While the LED is green, click the Read USB button and you will see the card data fields populate.
6. Click OK.
7. Repeat the steps above for each additional prox card.

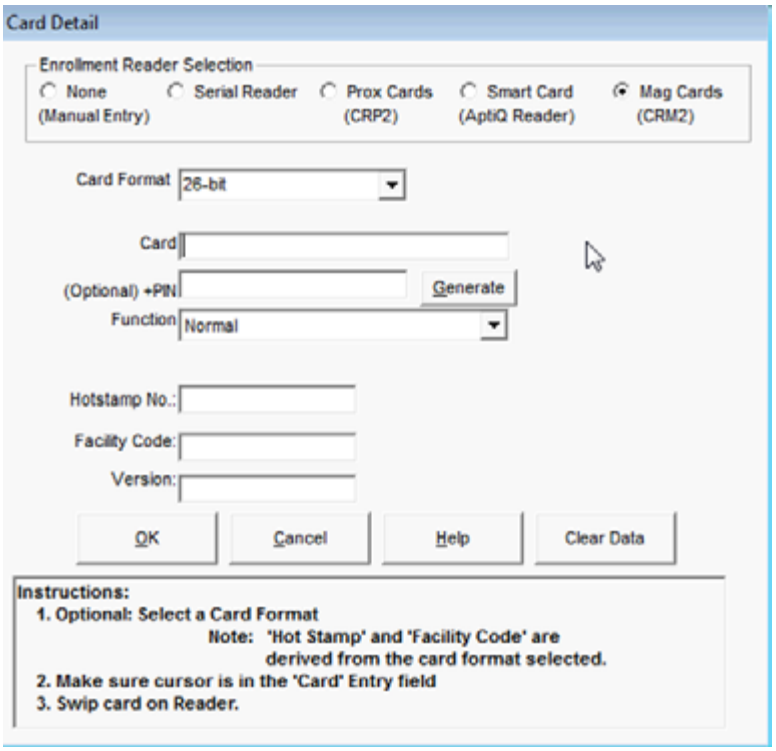


Using SMART Card Enrollment Reader:

1. Connect your SMART Card Enrollment Reader to your USB port and launch the Card Detail Window by clicking on the Add Credential button in the Users Window.
2. Select the card format from the Card Format drop down menu.
3. Place your cursor in the Card(s) field.
4. Present your card to the enrollment reader. The reader will beep and the card information will populate the Card(s) field.
5. Click OK.
6. Repeat the steps above for each additional 75-bit PIV card.

Using the CRM-2 Magnetic Stripe Enrollment Reader:

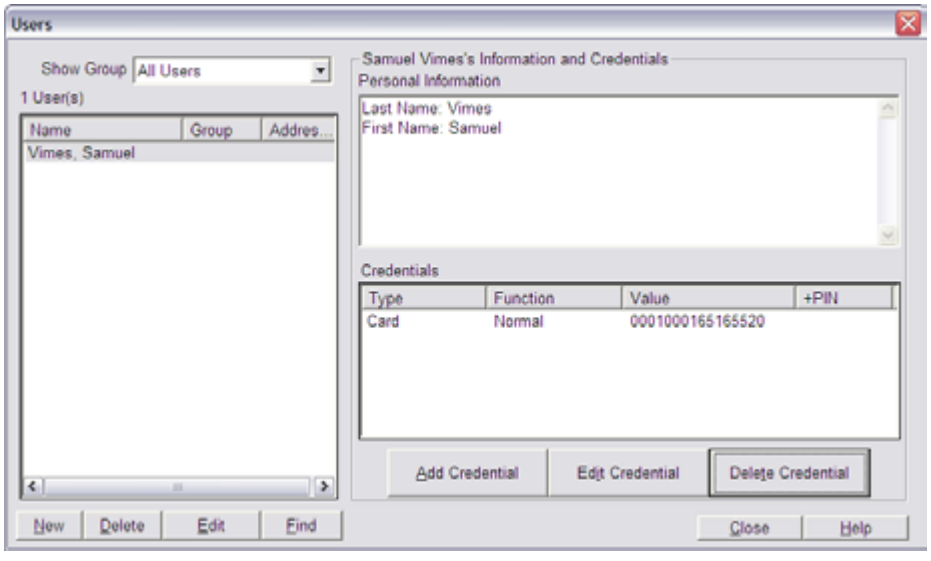
1. Connect your CRM-2 to your USB port and launch the Card Detail Window by clicking on the Add Credential button in the Users Window.
2. Place your cursor in the Card(s) (Mag or Prox) field.
3. Swipe the card in the enrollment reader. You will see your card data populate the Card(s) (Mag or Prox) field as in the example below.
4. Click OK.
5. Repeat the steps above for each additional magstripe card.



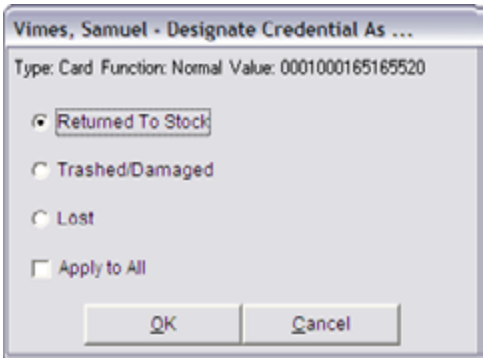
Deleting a Credential

Delete a credential record from the facility when a credential is lost or destroyed.

1. Click Users in the Main Window.
2. Select the user in the left pane, select the credential in the lower right Credentials pane, then click Delete Credential.
3. Click Yes to confirm deleting the credential.
4. Select an appropriate option and click OK:
5. Select Return to Stock if SCHLAGE EXPRESS is used to keep track of all unused Credentials.
6. Select Trashed/Damaged if a credential is destroyed and you have possession of it.



7. Select Lost for credentials that cannot be found.
   - ➔ NOTE: Selecting “Trashed/Damaged” or “Lost” removes the credential from the database.



➔ After deleting a credential, you must transfer the updated information to the lock. See **Programming a Lock** on page 107 for more information.

Doors

Door is the generic term for any opening that can be secured with a locking device. A door can be a regular internal or external entrance or exit, a sliding door, a cabinet etc. “Door” is also used as a synonym for “locking device” or “lock”.

The Doors Window

The Doors window is used to add, edit and delete doors. It is also used to assign and remove AutoUnlocks and Holidays, and to copy SmarTime functions from one door to another.

Open the Doors Window

Click the Doors button on the main menu to open the users window.

View Door Information

Click on any door title to view the information for that door.

Sort Doors

Click any heading to sort doors by that heading.

Add a Door

1. Click Doors.
2. Click New.
3. Enter the name for the door in the Name box.
4. The door name cannot contain the tab or the pound (#) character. If you are using a SNAP programmer to program the doors in your facility, the name of the door must be between one (1) and eight (8) characters.
5. Enter any (optional) notes in the Notes box.
6. Select the type of door (lock) from the Type box. Follow the directions below for the chosen lock type:

CO-200/CO-220/AD-200/AD-201/CT5000

1. Click the Use First Person In For AutoUnlock Schedules check box to enable/disable the Use First Person In feature.
2. Click to select/deselect the check box(es) next to each credential type that can be used on this lock.
   ➔ Credentials available in this section depend on settings selected in the Credentials and Devices section of Program Settings.
3. Assign AutoUnlocks to the door, if desired.
   ➔ AutoUnlocks can be assigned to a door at any time.
4. Assign holidays to the door, if desired.
   ➔ Holidays can be assigned to a door at any time.

CM/BE367 Lock

1. Click the Use First Person In For AutoUnlock Schedules check box to enable/disable the Use First Person In feature.
2. Click to select/deselect the check box(es) next to each credential type that can be used on this lock.
   ➔ Credentials available in this section depend on settings selected in the Credentials and Devices section of Program Settings.
3. Assign AutoUnlocks to the door, if desired.
   ➔ AutoUnlocks can be assigned to a door at any time.
4. Assign holidays to the door, if desired.
   ➔ Holidays can be assigned to a door at any time.

HandKey II

1. Enter the reader address into the Reader Address box.
   ➔ The address must be between 0 and 254. The address 170 is reserved and cannot be used. See the HandKey II documentation for information on locating the reader address.
2. Select the connection type from the Connection Type box.
   ➔ Check with your system administrator or see the HandKey II documentation for information on determining the connection type.
3. Enter the IP address into the TCP/IP Address box or select the serial port from the Serial Port drop-down box
   ➔ Check with your system administrator or see the HandKey II documentation for information on determining the IP address or serial port.
4. Click Test Connection.
5. If the Connection Successful box appears, click OK. All options were configured correctly and the reader and the system are communicating properly.
6. If the No Reader Found box appears, click OK and go back to step 6 and check all options. The reader cannot be located using the settings provided.
7. Click Configure Setup to configure the reader setup.
8. Assign AutoUnlocks to the door, if desired.
   ➔ AutoUnlocks can be assigned to a door at any time.
9. Assign holidays to the door, if desired.
   ➔ Holidays can be assigned to a door at any time.

Mechanical

The Mechanical Lock Properties information is completely optional. The Schlage SCHLAGE EXPRESS Software does not utilize this information in anyway. This screen is used to record the mechanical key management information for your facility for those locks/doors that are not controlled electronically or to record the mechanical key override information of electronic lock with mechanical key override capability. To complete this information, you will need to work directly with your facility locksmith.

If you are unsure whether you should enter mechanical key information into Schlage SCHLAGE EXPRESS software, contact technical support.

1. To add lock properties, click Properties.

BE367 Deadbolt Lock

1. Click to select/deselect the Enable Lock & Leave check box to enable/disable the Lock & Leave feature.
   ➔ The Lock & Leave Feature is a feature that applies only to BE367 Deadbolts. When Lock and Leave is enabled, the deadbolt can be re-locked from the outside of the door for a short period of time. By default, the Lock and Leave feature is disabled.
2. After the Device type has been chosen and set up:
   a. Click Save.
   b. Click Close to return to the main window.

Configure HandKey II Setup

1. Click Doors.
2. Click to highlight the name of the HandKey II door you want to edit in the list and then click Edit.
3. Click Configure Setup.
4. Choose one of the following:
5. Get Current Settings from the Reader
   a. Click Get Settings From Reader.
   b. The current settings will be displayed in each of the fields in the window.
   c. Click OK.
   d. Click Close.
6. Change Settings in the Reader
   a. Make changes to the desired fields.
   b. Click Update Reader.
   c. Click OK.
   d. Click Close.
7. Click Save.
8. Click Close.

Hand Reader Setup Data

Reference Info

Reader Address: Displays the address of the current reader as reference information. The entry in Reader Address cannot be edited in this screen.

Operating Settings

Access Retries Before Lockout: Sets the number of failed identification attempts allowed until a user is locked out of a reader. The lockout is removed after a different user successfully accesses the door. The range is 1: 250 and the default is 3.

Default Reject Threshold: Sets the level required for a hand template to match with the stored template. A read scoring below this level is considered a good read; anything above is rejected. Setting the level low results in a secure system, but may increase the false rejection rate, which reduces the convenience of use. This default level is used when the individual reject threshold in the user record is set to zero, otherwise the individual reject threshold overrides the default setting regardless if it is higher or lower. The range is 30: 250 and the default is 100.

Output Mode: Lock Output Mode has two options:

- Lock sets the relay output to simply open or close.
- Card sets the relay output to send out a number sequence that operates a Wiegand Control Module.

AUX Relay Time in Seconds: Number of seconds for which the AUX output contact changes its state after an event caused it to be activated. The range is 0: 2000 and the default is 5.

Re-lock Time in Seconds: Number of seconds for which the door will stay unlocked after a successful identification. The range is 0: 2000 and the default is 5.

Door Shunt in Seconds: Number of seconds between the end of the relock delay time and the beginning of a “Door Propped Open” alarm. The range is 0: 20000 and the default is 10.

Feedback

Beeper: When checked, the beeper will sound each time a button is pressed on the reader. Default is checked.

12 Hour Display: When checked, the time on the reader is displayed in the 12 hour AM / PM format. The default is unchecked.

Valid Access Clears AUX: When checked, a successful user identification will reset the AUX output. This can be used, for example, to cancel a local alarm. The default is checked.

Print Valid Access Attempt: When checked, the reader will print the “Valid Access” event message on a printer that has been connected to the reader. This option will only function when a printer is connected to the reader. The default is checked.

Display System Status: When checked, the reader status will be displayed instead of the time and date. This can be used as a troubleshooting technique. The default is unchecked.

Reader Menu Passwords

Security: Security menu password. Range is: 0: 9999999999 Default is: 5

Enrollment: Enrollment menu password. Range is: 0: 9999999999 Default is: 4

Management: Management menu password. Range is: 0: 9999999999 Default is: 3

Setup: Setup menu password. Range is: 0: 9999999999 Default is: 2

Service: Service menu password. Range is: 0: 9999999999 Default is: 1

AUX Output On

Door Alarm: When checked, the AUX Output will be activated when a door alarm occurs.

AUX In: When checked, the AUX Output will be activated when a signal change occurs at the AUX Input.

Invalid Access: When checked, the AUX Output will be activated when a when an invalid access event occurs.

Tamper: When checked, the AUX Output will be activated when a when the tamper switch is activated.

Power Failure: When checked, the AUX Output will be activated when a when a power failure occurs.

Edit a Door

1. Click Doors.
2. Click to highlight the name of the door you want to edit.
3. Click Edit.
4. Make any necessary changes. Use the information in the Add a Door section as a reference.
5. Click Save.

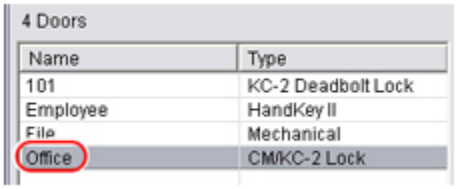
Copy SmarTime Functions from Door to Door

A set of SmarTime functions (AutoUnlocks and Holidays) can be copied from one door to another door, or to many doors. This is useful if you want all (or a large number of) the locks in your facility to have the same AutoUnlocks and Holidays. There are several things to remember when copying SmarTime functions:

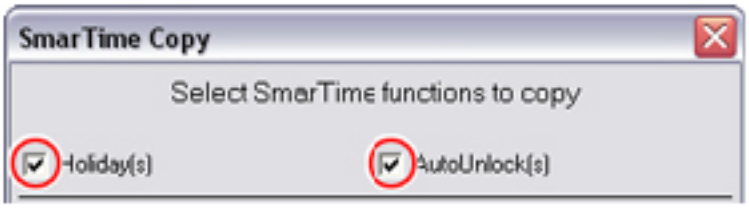
- SmarTime functions can only be copied to those doors that are capable of the selected SmarTime functions.
- If a door cannot manage the full number of the SmarTime functions that are being copied, then only the first items in the list will be copied.
- Holidays that are set as “Passage” or “Secured” will not be copied to doors that can only manage Holidays that are set to “Secured Lockout”. If the door designated as the copy source has Holidays assigned that are set to “Secured Lockout”, then only these Holidays will be copied.

➔ NOTE: When SmarTime functions are copied from one door to another, all previously assigned SmarTime functions will be lost.

1. Click Doors.
2. Click to highlight the name of the door from which you want to copy SmarTime functions.
3. Click Copy SMT.



4. Click to select/deselect the check boxes next to the type of SmarTime functions you want to copy.



5. Click to highlight the name(s) of the door(s) to which you want to copy the SmarTime functions.
   ➔ Multiple selections can be made by holding down the Shift or Ctrl key on your keyboard.
6. Click Copy & Close.

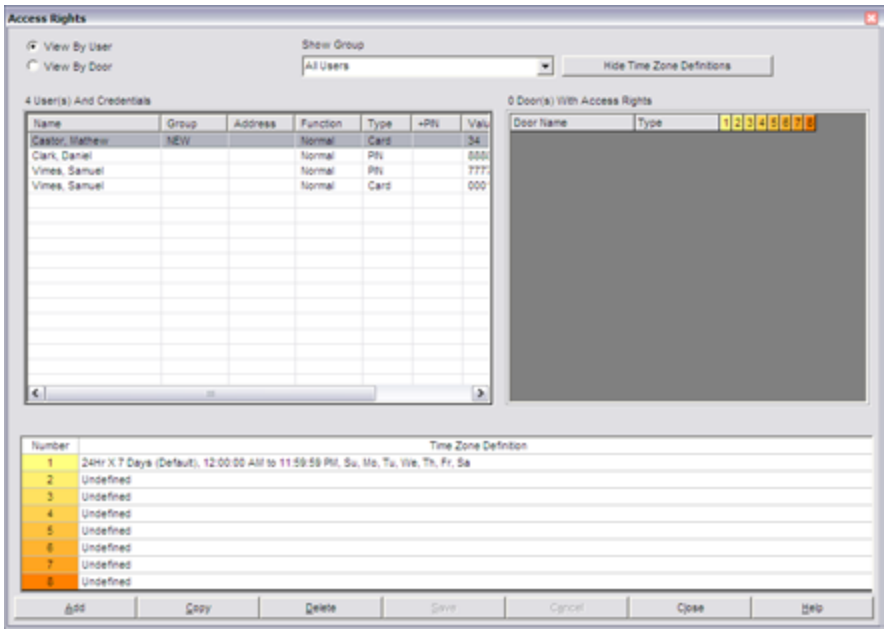
Delete a Door

1. Click Doors.
2. Click to highlight the name of the door you want to delete. Multiple doors can be selected by holding down the Shift or Ctrl key on your keyboard.
3. Click Delete.
4. Click Yes.

➔ NOTE: Users will continue to have access to doors that have been deleted from the system until the lock is physically removed from the door.

Access Rights

The Access Rights section is used to assign users access to specific doors. The Access Rights section can not be opened until Users have been added to the system with credentials assigned, and Doors have been set-up in the Doors section. See the ***Users***, ***Doors on page 93***, and ***Credentials on page 85*** chapters for details.



View By User: Select this option to display Users in the system. In this configuration Doors will be added to Users.

View By Door: Select this option to display Doors in the system. In this configuration Users will be added to Doors.

Show Group: Use this drop-down to filter the selection by Group. Default is All Users.

Hide Time Zone Definitions: Click this to hide the Time Zone Definitions at the bottom of the screen. Click again to show them.

Add: Click this to add access to the selected User or Door.

Copy: Click this to copy access from the selected user (or door) to another user (or door).

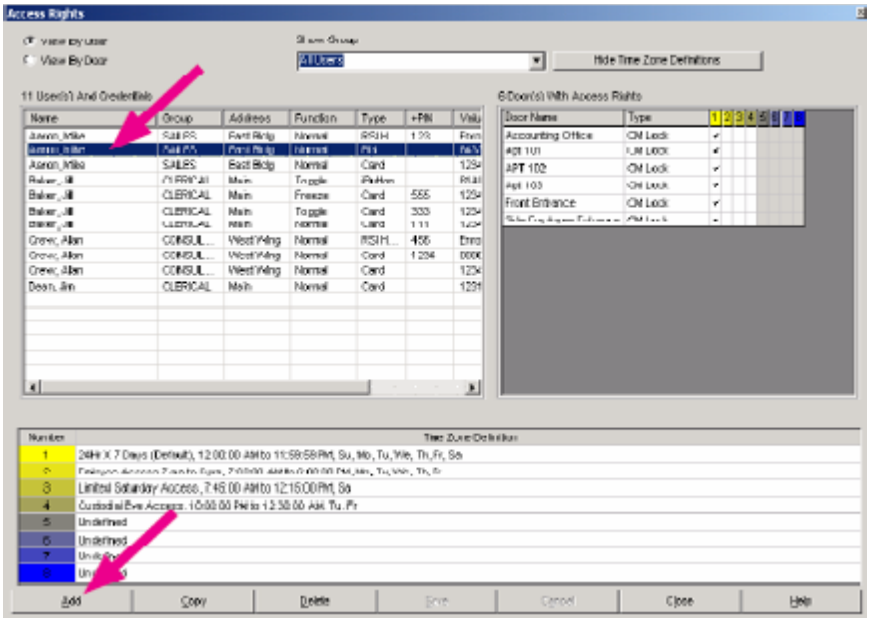
Delete: Click this to delete access from the selected user (or door).

Save: Click this to save any changes made to access rights.

Cancel: Click this to cancel any changes that have not yet been saved.

Assign Access Rights

Access rights can be assigned by User or by Door.

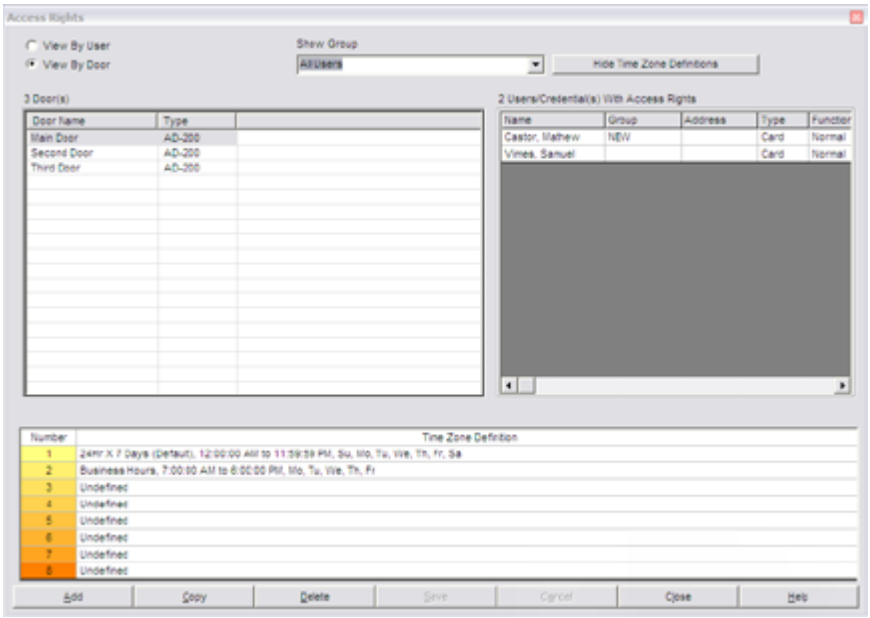


To assign access to a user:

1. Click Access Rights in the Main Window.
2. Click on the View By User option in the upper left corner of the screen. A list of Users and Credentials will populate the left table and Doors and time zones will populate the right table.
3. Select the user in the upper left pane, then click Add. The Select From List window will open showing all eligible doors in the system.
4. Select the door(s) that this user may open and then click Add. For multiple selections, hold the CTRL key while clicking selections.
5. In the Access Rights window, click the appropriate Time Zone for this user.
6. Click Save. The system saves the door and time zone assignments for the user.
7. Click Close to return to the Main Menu.

➔ NOTE: For Access Right changes to take affect Program Files will need to be generated and uploaded to the locks. See ***Generating Program Files*** on page 83 for more information.

To assign access to a door:

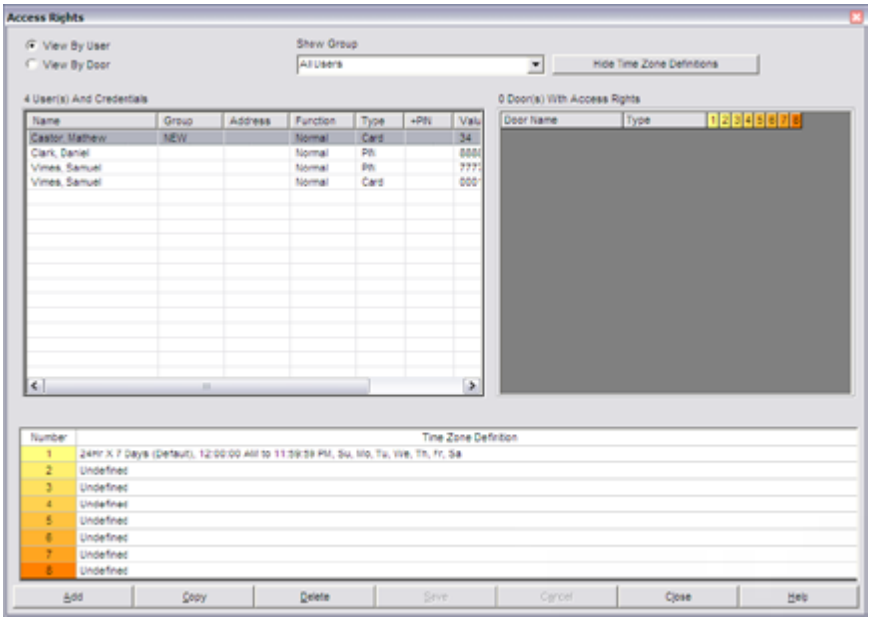


1. Click Access Rights in the Main Window.
2. Click on the View By Door option in the upper left corner of the screen. A list of Doors will populate the left table and a list of users will populate the right table.
3. Select the door in the upper left pane, then click Add. The Select From List window will open showing all eligible users in the system.
4. Select the user(s) that will have access to this door and then click Add. For multiple selections, hold the CTRL key while clicking selections.
5. In the Access Rights window, click the appropriate Time Zone for this user (you may have to use the scroll to the far right to see the time zone options).
6. Click Save. The system saves the door and time zone assignments for the user.
7. Click Close to return to the Main Menu.

➔ NOTE: For Access Right changes to take effect, Program Files will need to be generated and uploaded to the locks. See ***Generating Program Files*** on page 83 for more information.

Copy Access Rights

Access rights can be copied from one user to another (or group of other) user(s) or from one door to another (or group of other) door(s).

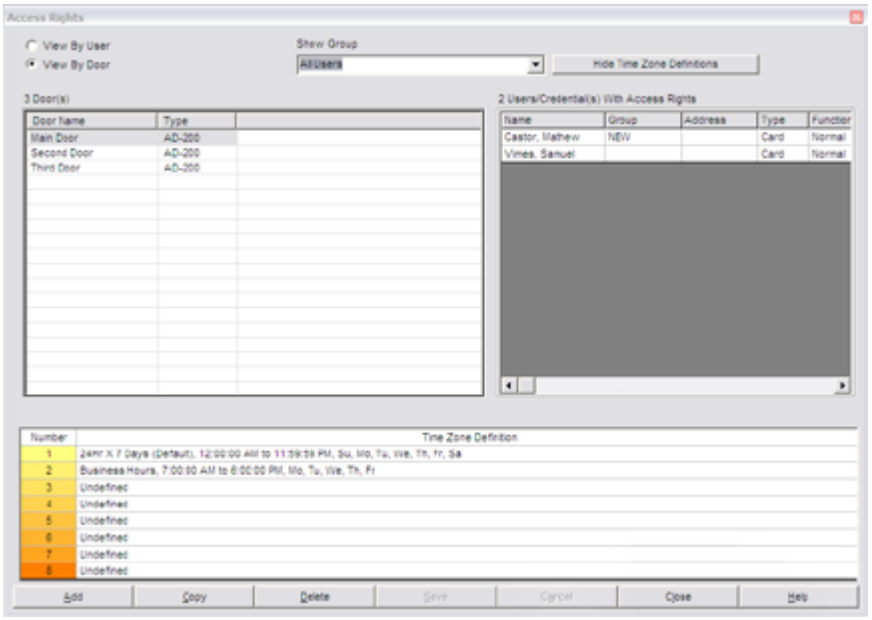


To copy access from one user to another:

1. Click Access Rights in the Main Window.
2. Click on the View By User option in the upper left corner of the screen. A list of Users and Credentials will populate the left table and Doors and time zones will populate the right table.
3. Select the user whose access is going to be copied, then click Copy. The Select the Users window will open showing all users in the system.
4. Select the user(s) that will have their access rights updated. For multiple selections, hold the CTRL key while clicking selections. Click on Copy. The Confirm Copy window will open.
5. Click Yes. The window will close and the access rights of the selected user(s) will be updated.
   - ➔ Note: Access will only be copied to the users with the correct credentials. If a user does not have the correct credential type an error message will open and the access will not be copied.
6. Click Close to return to the Main Menu.

➔ NOTE: For Access Right changes to take affect Program Files will need to be generated and uploaded to the locks. See ***Generating Program Files*** on page 83 for more information.

To copy access from one door to another:



1. Click Access Rights in the Main Window.
2. Click on the View By Door option in the upper left corner of the screen. A list of Doors will populate the left table and a list of users will populate the right table.
3. Select the door whose access is going to be copied, then click Copy. The Select the Doors window will open showing all doors in the system.
4. Select the door(s) that will have their access rights updated. For multiple selections, hold the CTRL key while clicking selections. Click on Copy. The Confirm Copy window will open.
5. Click Yes. The window will close and the access rights of the selected door(s) will be updated.
   - ➔ Note: Access will only be copied to doors with the same credentials. If a door does not use the same credential type an error message will open and the access will not be copied.
6. Click Close to return to the Main Menu.

➔ NOTE: For Access Right changes to take affect Program Files will need to be generated and uploaded to the locks. See ***Generating Program Files*** on page 83 for more information.

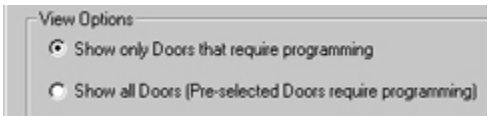
Generating Program Files

After you have assigned users, access rights, timezones and holidays to the doors in your facility, you must program the doors in order to transfer the information. Each time a change is made to a user, door, access right, timezone or holiday, each door that is affected by the change must be reprogrammed.

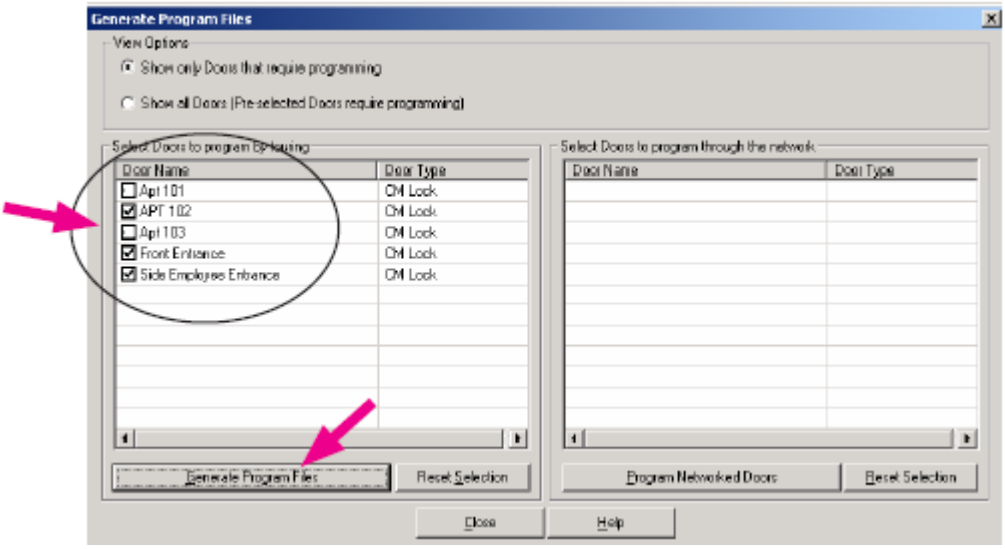
The process for generating program files for online and offline doors is slightly different.

Generate Program Files for Offline Doors

Be sure that your HHD is connect to the PC prior to generating program files.

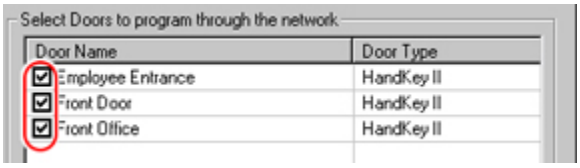


1. Click Generate Program Files in Main Window.
   - ➔ NOTE: The Generate Program Files item flashes when doors require programming, and indicates number of doors affected.
2. You can choose to show all the doors in the system or show only those that require programming.
3. All doors that need to be programmed will be selected by default. Click the check box next to any door you do not want to program to deselect it.
4. Click Generate Program Files.
5. Offline doors are not programmed at this point. You still need to physically tour each door. See ***Programming a Lock*** on page 85 for more information.



Generate Program Files for Online Doors

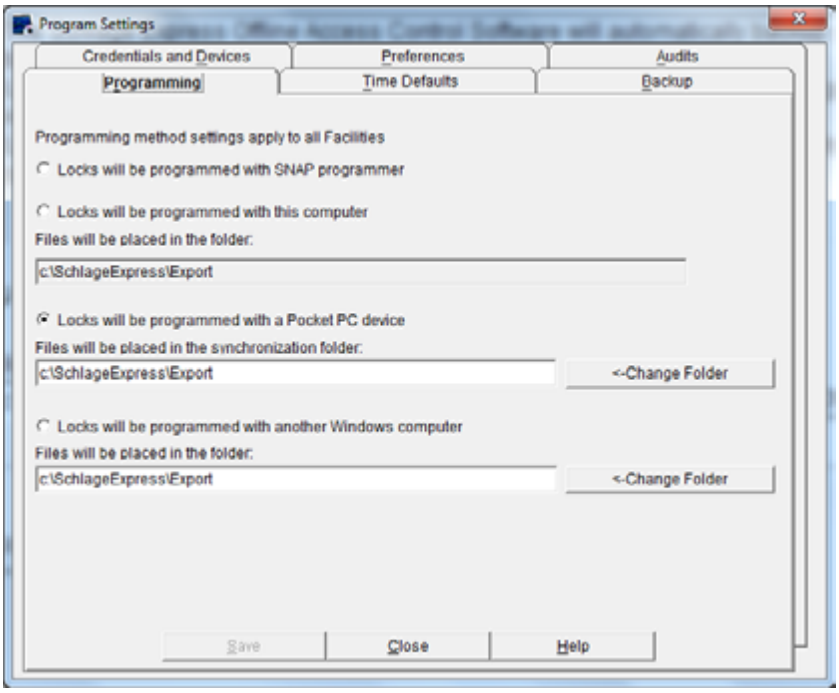
1. Click Generate Program Files in Main Window.
   - ➔ NOTE: The Generate Program Files item flashes when doors require programming, and indicates number of doors affected.
2. You can choose to show all the doors in the system or show only those that require programming.
3. All doors that need to be programmed will be selected by default. Click the check box next to any door you do not want to program to deselect it.
4. Click Program Networked Doors.
5. Online doors are automatically programmed once the program files have been generated. You do not need to do anything else to program the doors.



Programming a Lock

Selecting a System Programming Device

1. Start the Schlage Express application as before.
2. Go to Settings> Program Settings. The Program Settings window will open.
3. Select the Programming tab.
4. If you will be using a SNAP Programmer, select Locks will be programmed with SNAP Programmer.
   - ➔ NOTE: The Snap Programmer has been discontinued and replaced with the HHD.
5. If you will be using a HHD, select Locks will be programmed with Pocket PC device.
6. Click Save and Close.



Programming a Lock Using a HHD

To program a lock using the HHD you must first:

1. Set up the doors in your system and create program files for those doors. See Generating Program Files on page 83 for more information.
2. Couple the HHD to the Door you wish to program.
3. Program the Lock for the first time. Follow the steps below for coupling and programming locks.

Coupling

1. Connect the HHD to the lock.
2. Select Start on the HHD.
3. Select Schlage Utility Software (SUS) from the program menu. The SUS login screen will open.
4. Select Manager from the Log on drop down.
5. Enter password into the password field (default is 123456)
6. Click Log On. The main screen will open.
7. Start communication between the HHD and the lock (see specific lock for details).

8. Click on Device Options. The Device Options screen will open.
9. Put the lock in coupling mode (see specific lock for details)
10. Click on Couple HHD to Device option. Once the lock has been coupled to the HHD you will not need to repeat this step unless you use a different HHD.

Programming

Before you can program a lock with the HHD, you must generate program files and transfer them to the HHD. See Generating Program Files on page 83 for more information.

1. Bring the HHD and either the USB cable or the Serial Cable with the CIP attached to it, to the lock that needs programming. Do not plug the USB/ CIP into the lock at this time.
2. Select Start on the HHD.
3. Select Schlage Utility Software (SUS) from the program menu. The SUS login screen will open.
4. Select Manager from the Log on drop down.
5. Enter password into the password field (default is 123456)
6. Click Log On. The main screen will open.

7. Connect the HHD to the lock using the USB or CIP cables.
8. Start communication between the HHD and the lock (see specific locks for details)

.

9. Click on Device Options. The Device Options screen will open.

10. Click on Program Lock.

11. Select the Lock you wish to program from the list and Click OK.
12. Click Yes.

13. Click Ok. The lock is now programmed.

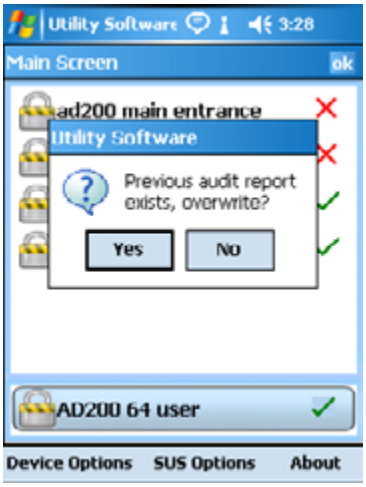
Updating Locks

Once the lock has been coupled and programmed you can update the lock easily.

1. Generate new program files if needed.
2. Download those files to the HHD using ActiveSync or Windows Mobile Device Center.
3. Connect the HHD to the lock being updated.
4. Connect the HHD to the lock.
5. Select Start on the HHD.
6. Select Schlage Utility Software (SUS) from the program menu. The SUS login screen will open.

7. Select Manager from the Log on drop down.
8. Enter password into the password field (default is 123456)
9. Click Log On. The main screen will open.

10. Start communication between the HHD and the lock (see specific locks for details).
11. When Auto Update is enabled in the SUS, as soon as the communication starts, the lock will automatically:
    - update lock's date/time
    - collect audits
    - update access rights



➔ Note: For Manual Update or for legacy locks information refer to the Schlage Utility Software – User Guide.

Click Yes when message pops up.

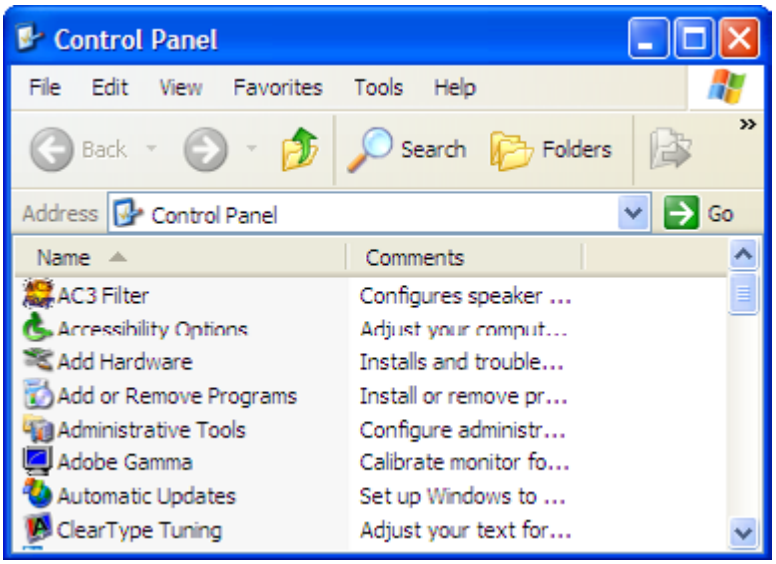
12. Click OK. The lock has been updated.

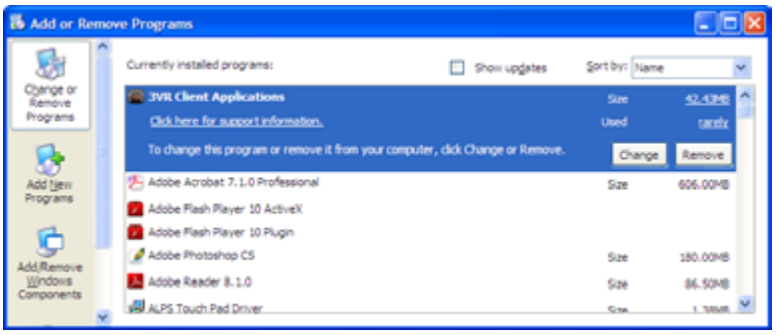
Appendix A:
Upgrading from Previous Versions of Schlage Express

It is possible to upgrade your system from a previous version of Schlage Express. Follow the directions below to upgrade your system.

➔ Note: Program Settings and other individual settings will not be backed up and will need to be re-entered into the new version after upgrade.

1. Backup the database
   a. The system is set, by default, to automatically backup the database whenever the system is closed. Make sure this feature is enabled. See Settings on page 29 for more information.
   b. Close the system to back up the database.
2. Copy the backed up database file to another location or folder.
   a. Open the location of the backup file.
   b. Copy the file.
   c. Paste the copied file into a new directory of your choice.
3. Uninstall the current version of the Schlage Express
   a. Open the Control Panel.
   b. Open the Add or Remove Programs option.
   c. Select Name from the Sort by drop down box.
   d. Scroll down the list until you see Schlage Express. Select it.
   e. Click the Remove button. Schlage Express will be uninstalled.
4. Delete the Schlage Express folder from Program Files. (Because of the ProxXLator.exe program the folder will need to be manually removed).
   a. Go to My Computer.
   b. Click on C:\
   c. Click on Program Files.
   d. Find and Select the Schlage Express folder.
   e. If the above folder exists, then continue with these steps; otherwise, go to step 5.
   f. Right Click and select Delete from the drop down options. The Confirm Folder Delete window will open.
   g. Click OK. The folder will be deleted.
5. Install this version (4.4.6) of Schlage Express. See Installing/Starting Schlage Express on page 19 for more information.
6. Restore the back up the previous version.
   a. Sign into Schlage Express.
   b. Go to Facility>Restore Backup.
   c. Click Yes. The Select Facility to Restore window will open.
   d. Navigate to the database that was backed up from the previous version and select the backup file.
   e. Click Open. The Existing Facility File Found window will open.
   f. Click OK.





The old Database has been attached to the new version of Schlage Express and your upgrade is complete.

Appendix B: ProxXLator

Overview

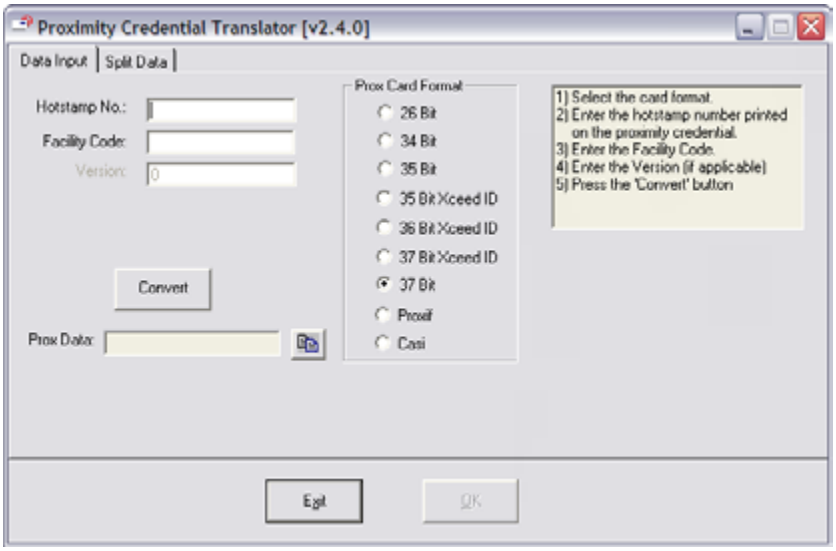
The ProxXLator application is included with Schlage Express to help the user with deriving proximity card data. The Data Input section allows the user to derive the proximity card raw data from the card's Hotstamp, Facility Code and Version number. The Split Data section allows the user to extract Bit Data along with Hotstamp, Facility Code and Version information using known card formats.

To open the ProxXLator application, do one of the following:

- Double Click on the ProxXLator shortcut icon that was installed during the Schlage Express installation
- Go to Start Menu>All Programs>Schlage>Launch ProxXLator.exe

Data Input

The Data Input window of the ProxXLator application opens automatically when the application is started. It can also be accessed by clicking on the Data Input tab at the top of the window.



Hotstamp No Field: This is where the Hotstamp of the proximity credential will be entered.

Facility Code Field: This is where the Facility Code of the proximity credential will be entered.

Version Field: This is where the Version number (if applicable) of the proximity credential will be entered.

Convert button: Clicking this button converts the information in the above fields and displays that information Prox Data field.

Prox Data Field: This field shows the converted proximity data once the above fields have been entered and the Convert button has been clicked.

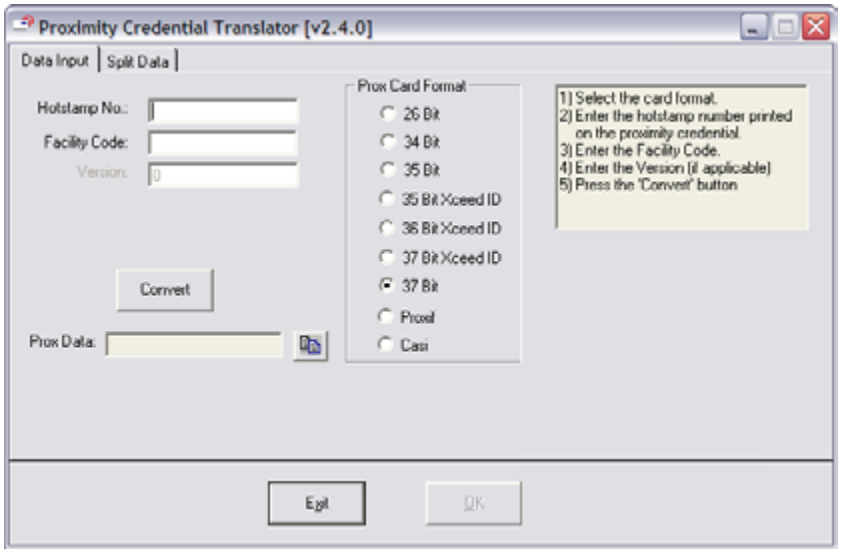
Copy Button: This button is used to add the information in the Prox Data field to the clip board. The information can then be pasted into Schlage Express.

Prox Card Format Section: Lists all the Card Formats that are supported by the ProxXLator application and allows the user to select which format is in use.

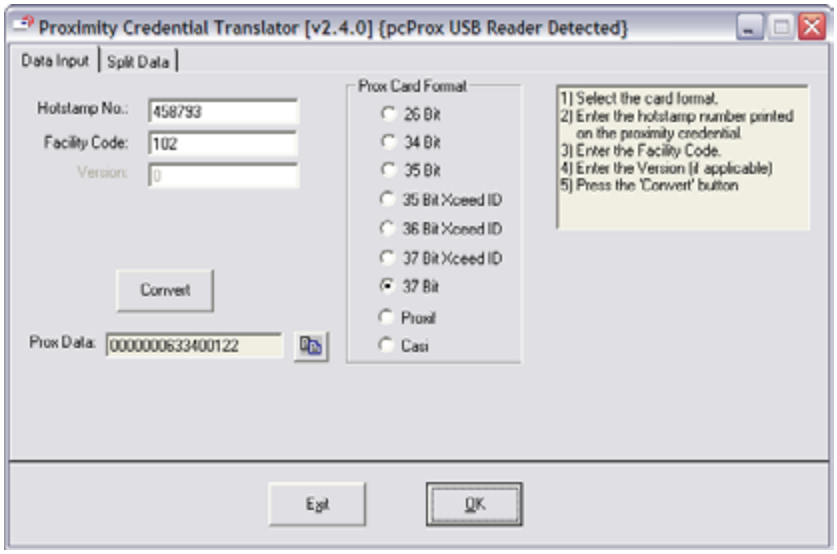
Using Data Input

To use the Data Input application to derive the Prox Data from a proximity card, follow the instructions below:

1. Open the ProxXLator application.
2. Click on the Data Input tab if not already selected.
3. Select the card format from the Prox Card Format list.
4. Enter the hotstamp number of the card in the Hotstamp No. field.
5. Enter the facility code in the Facility Code field.
6. Enter the version number (if any) in the Version field.
7. Click the Convert button. The converted proximity card data will display in the Prox Data field.

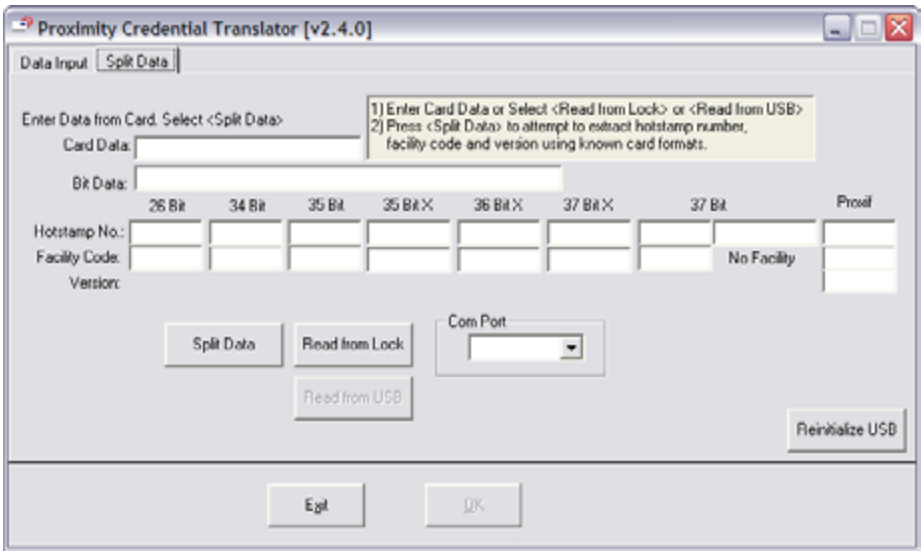


8. To copy the proximity card data to the clipboard click on the copy button . The proximity card data can now be pasted into Schlage Express or another application.



Split Data

The Split Data window of the ProxXLator application is accessed by clicking on the Split Data tab at the top of the window.



Card Data: This field displays the raw card data of the proximity credential. The data can be manually entered into this field or populated by an enrollment reader.

Bit Data: This field displays the bit data of the proximity credential.

Hotstamp No.: These fields display the converted Hotstamp information of the credential. The card format of the credential will determine which fields will populate. Multiple fields will populate if the data lends itself to multiple formats.

Facility Code: These fields display the converted Facility Code information of the credential. The card format of the credential will determine which fields will populate. Multiple fields will populate if the data lends itself to multiple formats.

Version: This field will display the version information for the Proxif format only.

Split Data: Clicking this button converts the information from the Card Data field into the other fields.

Com Port: If reading credential information from a lock or serial reader, use this drop down to specify which port it is connected to.

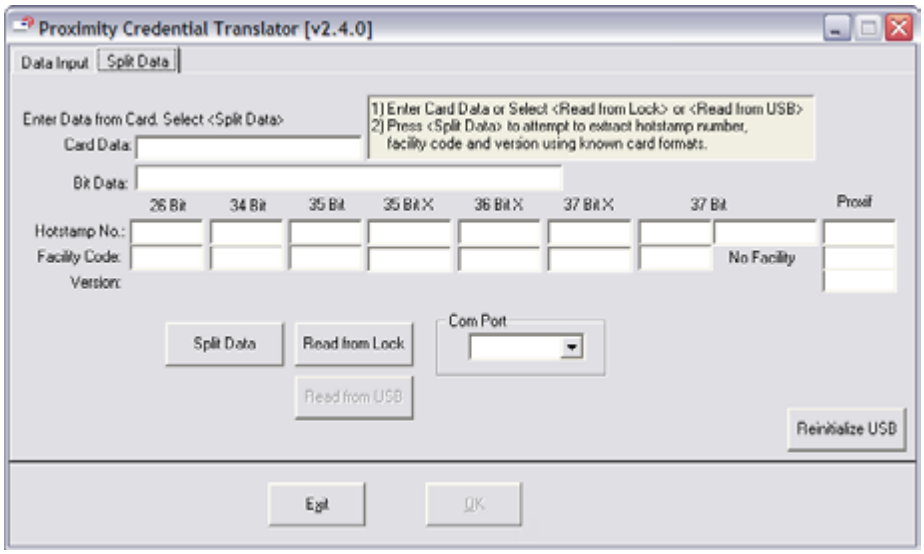
Read From Lock: If reading credential information from a lock, present the card to the lock and then click this button, the card information will populate the Card Data field.

Read from USB: If reading credential information from a USB reader, present the card to the reader and then click this button. The information will populate the Card Data field.

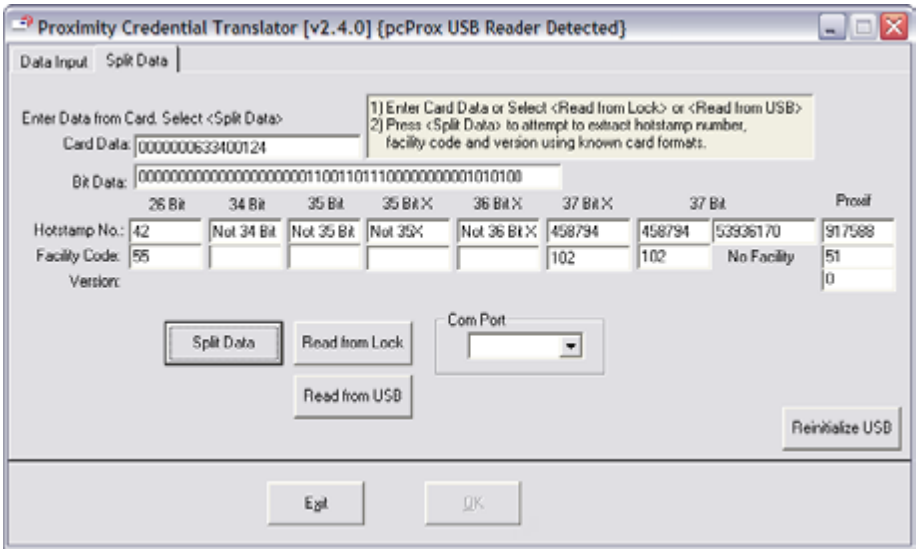
Reinitialize USB: If the USB reader is connected to the computer after the ProxXLator application has been started, click this button to enable the USB reader.

Using Split Data

To use the Split Data application to derive the hotstamp, facility code and version number from a proximity card, follow the instructions below:



1. Open the ProxXLator application.
2. Click on the Split Data tab.
3. Manually entering data:
   a. Enter the proximity card data into the Card Data field.
   b. Click on the Split Data button. The bit data of the card will populate the Bit Data field and any converted data will populate the Hotstamp, Facility Code, and Version fields under the applicable card formats.
   c. Repeat steps a and b for any additional cards.
4. Entering data using a Lock or Serial Reader:
   a. Connect the lock to the computer.
   b. Select the com port of the lock using the Com Port drop down.
   c. Present the card to the lock to be read.
   d. Click the Read from Lock button. The proximity card data will populate the Card Data field.
   e. Click on the Split Data button. The bit data of the card will populate the Bit Data field and any converted data will populate the Hotstamp, Facility Code, and Version fields under the applicable card formats.
   f. Repeat steps c through e for any additional cards.
5. Entering data using a USB Reader:
   a. Connect the reader to the computer.
   b. Click the Reinitialize USB button.
   c. Present the card to the reader to be read.
   d. Click the Read from USB button. The proximity card data will populate the Card Data field.
   e. Click on the Split Data button. The bit data of the card will populate the Bit Data field and any converted data will populate the Hotstamp, Facility Code, and Version fields under the applicable card formats.
   f. Repeat steps c through e for any additional cards.



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