



AccessPilot Lock Software

User Manual

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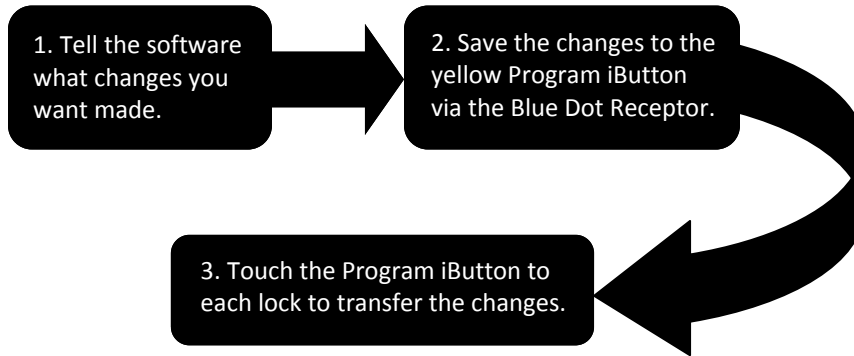


Foreword

Congratulations and thank you for purchasing a CrossOver iButton Lock and AccessPilot software.

This manual describes your new lock and explains how to use its features. Before installing the lock on your door (using the template included in your lock package), you should install the AccessPilot software and use it to set up the lock's electronics.

How the system works



Here's an overview of how the lock and AccessPilot software work together:

1. After the AccessPilot software and BlueDot Receptor are installed on a PC, a supervisor tells the software which users get access to which locks. He or she also decides when each user can have access to each lock—either between certain hours or all the time.
2. The supervisor snaps the Program Key into the Blue Dot Receptor. The instructions for the lock are transferred from the software through the Blue Dot Receptor to the Program Key.
3. The supervisor touches the Program Key to the receptor on the lock. While the Program Key is in contact, the instructions are transferred to the lock's memory. When the process is complete, the lock knows who is authorized to open the door.
4. Each user is issued an iButton Key, a small, key-sized device that fits on a keychain; or a four- to eight-digit keycode; or both. To open a lock that they have been given access to, all they have to do is touch the iButton Key to the receptor on the lock; or enter their keycode on the lock's keypad; or both.

What do I do next?

Here's how we recommend you start:

1. Install the AccessPilot software and Blue Dot Receptor on your PC.
2. Set up your users and assign them iButtons or keycodes in the AccessPilot software.
3. If you're installing multiple locks, use the software to set up the lock that will be used the least. This will help you to understand how the process works without causing inconvenience.

What's in the box?

In the box, you'll find:

- Lock front half.
- Lock back half.
- Latch.
- Plastic bag with installation hardware, Mechanical Keys for emergencies and a cover for the keyhole on the front of the lock.
- Installation templates.

The Management Kit includes:

- Software CD and manual
- Program iButton
- Blue Dot Receptor


iButton keys are sold separately.

4. Install the lock on the door using the template and instructions provided in your lock package.
5. Set up and install the other new locks.

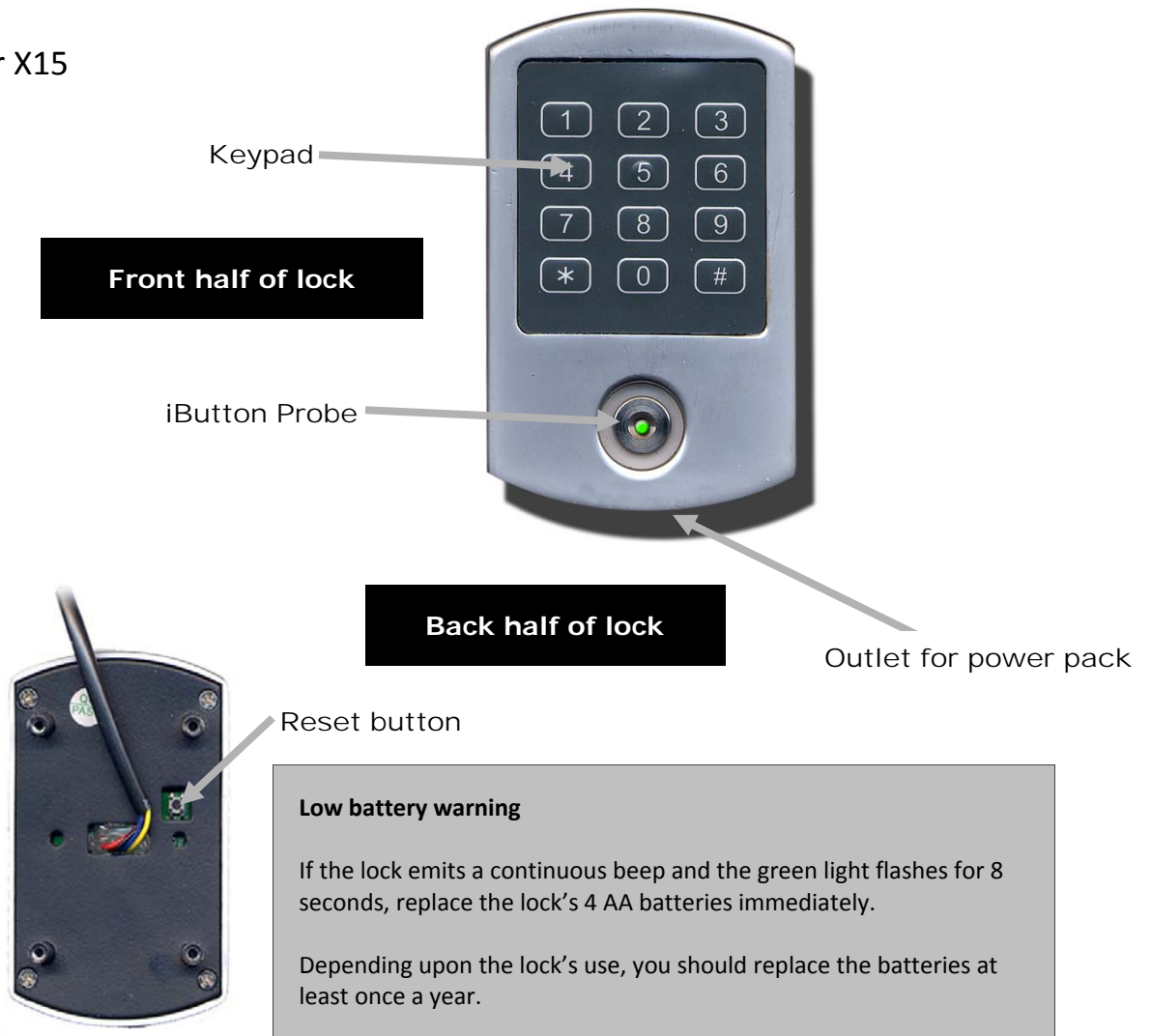
Lock Maintenance

Except for occasional battery replacement, the locks are maintenance-free. The lock is designed to handle 10,000 operations (unlock, lock, etc.) before the batteries need replacing. The lock will warn you when its batteries get low—the red LED will light up and it will beep three times—but to be on the safe side, we suggest replacing the four alkaline AA batteries every six months. Be sure to insert new batteries within 5-10 minutes of removing the old ones; if you do so, all data in the lock will be retained. If the lock’s batteries are removed for a longer period of time, you may have to reset the time in the lock. For instructions on how to do so, see Page 16.

Each lock comes with an external power pack that can be used to power the lock in emergencies. If your lock’s batteries run out, you can use this power pack to gain access to the lock. Do not store the power pack inside the room that the lock is protecting!

 **Hardware Overview**

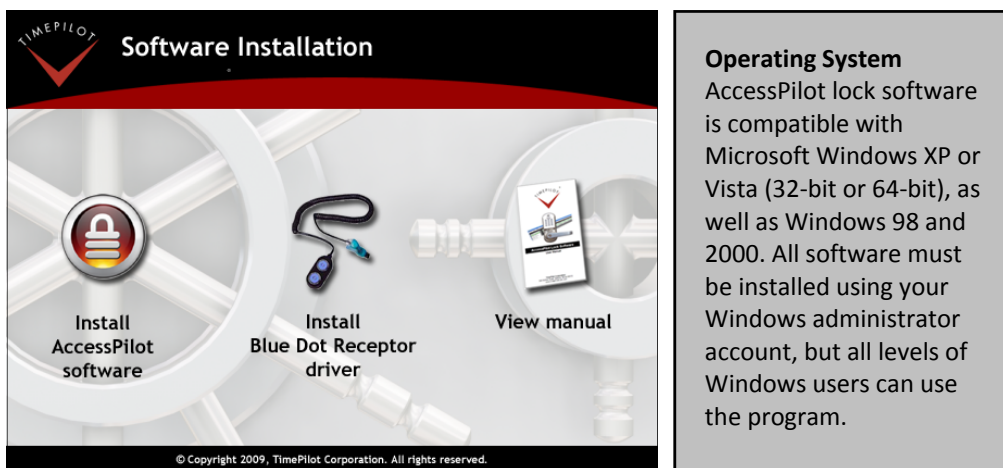
CrossOver X15



AccessPilot software installation

To start the installation process, insert the software CD into your computer. Note: On most computers, the installation screen will appear automatically. If it does not, select **Start**, then **Run**, browse your CD-ROM drive and click the **AccessPilotSetup.exe** file.

The software's installation screen (shown below) will appear.



Operating System

AccessPilot lock software is compatible with Microsoft Windows XP or Vista (32-bit or 64-bit), as well as Windows 98 and 2000. All software must be installed using your Windows administrator account, but all levels of Windows users can use the program.

First, click on “Install Blue Dot Receptor Driver” and follow the instructions to install the small software program that will allow the receptor to work.

When the Blue Dot driver is installed, return to the installation screen above and click on “Install AccessPilot Software.” You may be asked whether you have a 32-bit or a 64-bit version of Windows. Here’s how to find that out:

1. Click the “Start” button on your desktop.
2. Click “My Computer.”
3. In the “System Tasks” menu, click “View System Information.”
4. Your version of Windows will appear in the list of information. If the version includes the words “64-bit,” you have a 64-bit version of Windows. If it says “32-bit” or does not mention whether it’s 32- or 64-bit, you have a 32-bit version of Windows.

Now the AccessPilot Setup Wizard will start. Click “Next,” then enter your name, organization and serial number on the Customer Information screen. Your serial number will be found either on a sticker on the inside cover of this manual or on a sticker on the envelope containing the AccessPilot CD.

Next, you’ll tell the program where to install itself. (Unless you’re an advanced user and want to install the program in a specific place, it’s best to accept the location suggested by the software.)

After reading the license agreement, if you accept the terms, click the button next to “I accept the terms...” and “Next.” The “Ready to Install” screen will appear. Click the “Install” button to start installation.

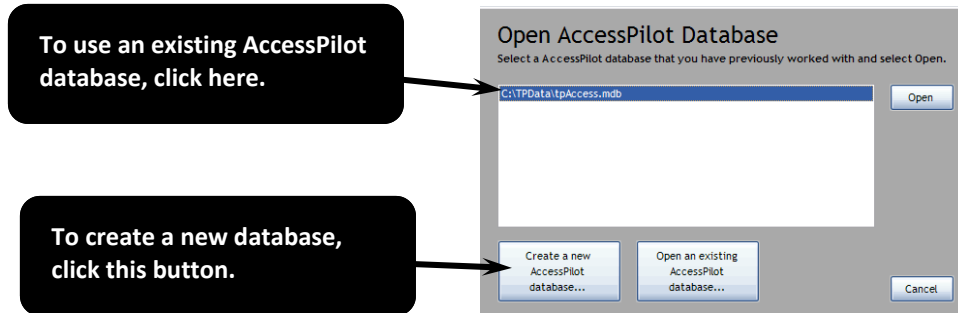
When installation is complete, you’ll see the AccessPilot icon (shown at right) on your desktop.



The first time you start the program, AccessPilot will ask you where it should store the data it uses. To create a

new AccessPilot database, click the appropriate button at the bottom of the screen and follow the instructions.

If you're re-installing the software, the database that holds the information about your locks and your users will appear in the box in the middle of the screen. If you tell AccessPilot to use the previously established database, you won't have to set up your users and locks again; they'll be there when AccessPilot's main screen opens.



After setting up your database, you'll be asked to set a password. This password will be linked to the username of "Admin"; when starting the program you can log in with the username of Admin and this password. To add users and change passwords later, see Page 17.

Now you'll be asked to set a six-digit Security Code. When the software communicates with your locks, it automatically uses the Security Code to verify to the locks that this installation of the software has the authority to make changes.

We suggest that you write down your Security Code and keep it someplace safe, because once it is set, you won't be using it on a regular basis. If you need to change your Security Code (an uncommon occurrence), here's how: Start your AccessPilot software, click the "Administrative" menu and choose "Lock Security Code Setup." Fill in the fields and click OK.

Important Note: If you change your Security Code, you'll need to set up all your locks again, because the locks won't recognize the new Security Code.

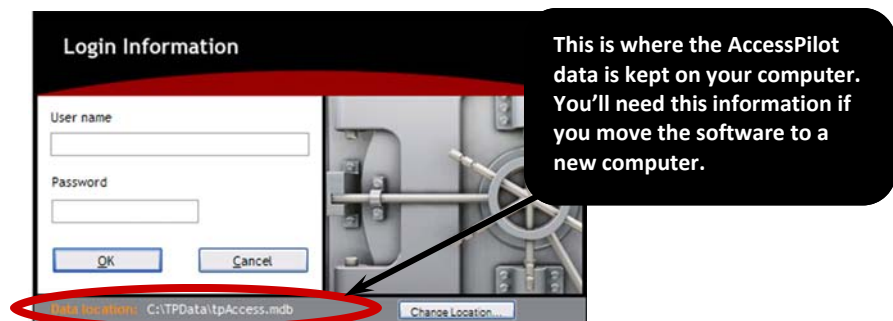
The software setup is complete! You can continue in the wizard to set up your users, or you can close the wizard and set up users as described on Page 8. Be sure the read the next two sections of the manual—they explain how to start the software and give an overview of the main screen.

Running the AccessPilot software

When the AccessPilot software is installed, an icon like the one to the right will appear on your desktop. Click the icon to start the program.



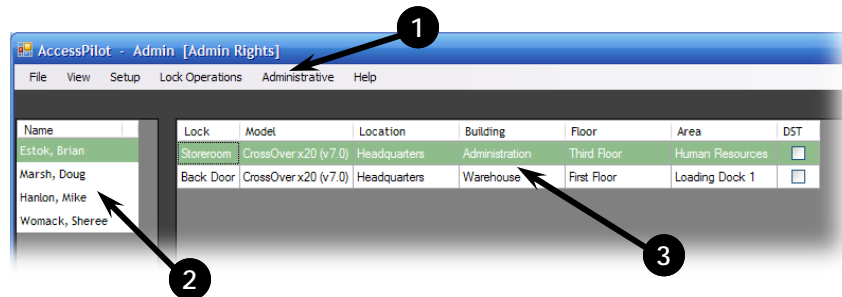
The screen at right will appear. Type your user name and password and click OK to enter the program.





Software overview

The software's main screen (shown below) has three parts. The numbers on the screenshot are keyed in the text.



1 At the top of the screen is the menu bar, containing six items:

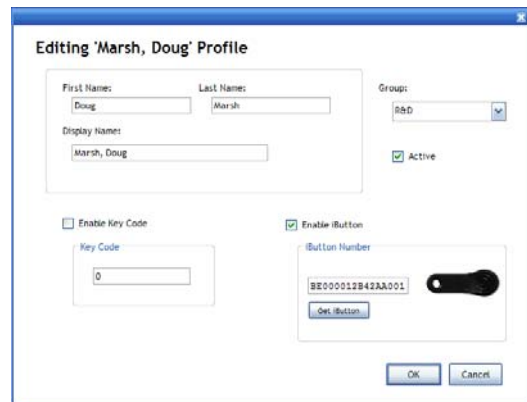
- **File.** This contains two sub-menus:
 - **Import iKeypad Data.** This allows those who are using the Eternity version of the lock software to import their settings into AccessPilot. See the Appendix for step-by-step instructions.
 - **Exit.** Quits the program.
- **View.** This contains one sub-menu:
 - **View Audit Trail.** This function displays a list of who has used the lock and who has attempted to use the lock. It also lists the date and time of the attempt. See the instructions on Page 18 for details.
- **Setup.** With these sub-menus, you can add users to the system and configure your locks.
 - **Add Person.** This is where you add lock users to the system and assign them their iButtons. **Note:** If you want to edit a user who already exists in the system, just double-click on their name in the list on the left side of the screen.
 - **Set Up Departments.** When you add a lock user, you can indicate the department where they work by choosing from a list of departments. This is where you create that list of departments (maintenance, sales, human resources, etc.). The department appears in the user's profile, as well as in the list of those authorized to use each lock. This function is for your organizational purposes only.
 - **Set Up Locations, Set Up Buildings, Set Up Areas and Set Up Floors.** When you set up a lock in the software, you can indicate its location. This is where you create the choices. You could, for instance, identify a lock as being on the Third Floor (**Set up Floors**) of Human Resources (**Areas**) in Building 3 (**Buildings**) at Company Headquarters (**Locations**). These functions are for your organizational purposes only.
- **Lock Operations.** These sub-menus control all the functions of your lock.
 - **Add New Lock.** Use this wizard to add a new lock to your system.
 - **Get Lock Info.** This allows you to retrieve the lock's entire setup information, including key assignments, lock version number, the current date and time and whether the lock is currently in Storehouse or Classroom Mode. (See Page 10 for definitions of Storehouse and Classroom Modes.)
 - **Get Audit Trail.** Each lock keeps a record of who used it and when. You can download this information, called an audit trail, here.
 - **Set Lock Date and Time.** Each lock has a clock inside it. If you need to restrict access to certain times of day, or will want to download an audit trail (see above), you'll need to set the time and date on the lock.
 - **Set Lock Parameters.** This process allows you to set the lock's red light to blink if desired (helpful if the lock is in a dark area, but a slight draw on the batteries). Also, if the lock is in Storehouse Mode (re-locking itself shortly after each time it is opened), you can set the delay before it relocks to up to 25.5 seconds.

- **Lock Override.** With this function you can set the lock to remain locked or remain open until the Program Key is touched to the lock again. If you do this, the settings for individual iButton keys are ignored. Therefore, if the lock is set to “Always Open,” it remains open and anyone can enter until the Program Key is touched to it; if it’s set to “Always locked,” no one can get in until the Program Key is touched to the lock.
- **One-Time-Use Keycode Setup.** If your lock has a keypad (CrossOver X25 or X15), you can set as many as 10 four- to eight-digit codes that will allow one-time access to the lock. These could be used if, for instance, a repairman needed access to your facility. They could punch in their one-time keycode and enter your facility, but once the code is used it cannot be used again.
- **Delete Lock.** Removes the lock from the software.
- **Administrative.** These menu items allow you to change a lock’s security code, give others access to the software and change passwords.
 - **Lock Security Code.** When the AccessPilot software communicates with your locks, it automatically uses this security code to verify to the locks that it has the authority to make changes. You set your security code when you installed the software; if you need to change your code (an uncommon occurrence), this is where it’s done. **Important Notes:** 1. If you change your security code, you’ll need to set up all your locks again, because the locks won’t recognize the new code. 2. Be sure to write down your new security code; you’ll need it if you ever change it again.
 - **Login User Setup.** Here’s where you can add and delete users of the software and edit the login name and password for current users. By default, the first user of the software has the username of Admin; your password was set up when you started the software for the first time.

2 Down the left side of the screen is a list of names of all those who have been set up in the software. To see or change a person’s profile, just double-click the name. The user’s profile page (shown at right) will appear.

3 On the right side of the screen is a list of the locks that have been set up. To see the properties of a particular lock—its users, their restrictions and the lock’s location—double-click the lock’s name. The locks are identified in the list by name, model, location, building, floor and area. The seventh column is labeled “DST”; if the lock has been set up to automatically correct its clock for Daylight Saving Time, there will be a check in this column.

To set the lock for Daylight Saving Time, see Page 16.



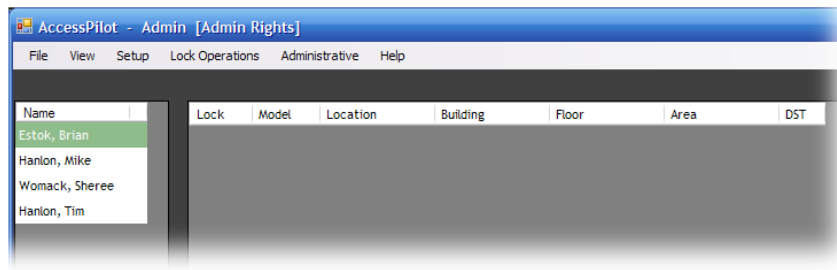
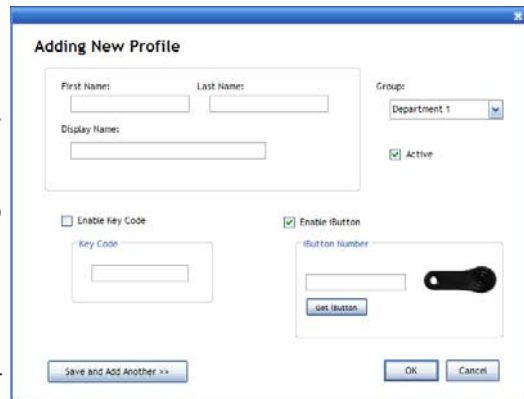
Using the AccessPilot software

First, set up your users and assign iButtons

If this is the first time you’ve used the software, you’ll be taken through a step-by-step wizard to set up your users and locks. For the following explanation, we won’t use the wizard.

1. Start the AccessPilot software by clicking the icon on your desktop.
2. Log in with your username and password.
3. First, we’ll do some preparation. The AccessPilot software can list each user’s department, so we’ll need to tell the software what departments are available (maintenance, sales, human resources, etc.). This step is optional. If you don’t create any departments, everyone will be listed as a member of “Department 1.”

4. Click the “Setup” menu item, and then “Set up Departments ...”
5. “Department 1” is already in the list; if you want to change that to something appropriate for you, click “Edit Department...” and make the change. Click the “Add Department” button to add another department. Continue adding departments until you’re done, then click “Close.”
6. Now you can add users. Click the “Setup” menu item again, then “Add Person ...” The Adding New Profile box (shown at right) will pop up.
7. Enter the user’s first and last names in the appropriate boxes. The “Display Name” box will show how the person’s name will be displayed in the software.
8. Choose one of the departments you just set up from the drop-down box on the right.
9. Make sure the “Active” box is checked. If it is not checked, the user will not be able to operate the lock.
10. Now you have a choice. If at least one of your locks has a keypad, you can have your users operate the lock with a four-to eight-digit keycode or with an iButton or with both. Click the checkbox next to one or both methods.
 - If you chose keycode, enter four to eight digits in the appropriate field.
 - If you chose the iButton, snap an iButton into the Blue Dot Receptor and click the “Get iButton” button. The software will read the iButton’s serial number and display it in the appropriate field. You can also type the serial number in manually by reading it from the bottom of the iButton, but using the Blue Dot Receptor is recommended.
 - If you chose to use both, perform both procedures above. Your users will now have to tap their iButton, then enter their keycode to operate the lock.



After you’re finished setting up users, your administration screen will look like the screenshot above: Users appearing in the list to the left, and no locks appearing (yet!) in the list to the right.

Now set up your locks

The following instructions assume you’re still logged in to the AccessPilot software. If you aren’t, start the software by clicking the icon on your desktop and log in with your username and password.

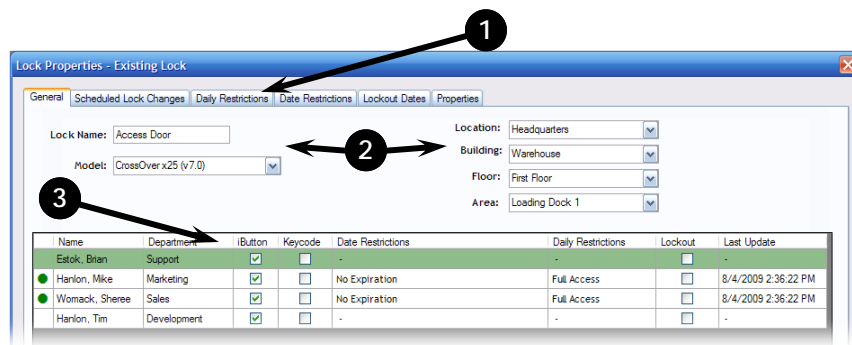
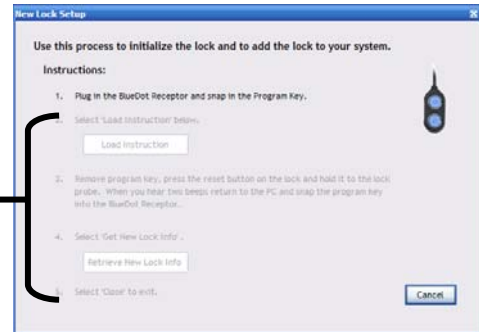
1. First we’ll do some preparation. This is entirely optional, but it will help you identify your locks, especially if you have them scattered throughout your facility. Click the Setup menu, then “Set Up Locations.” Here you can add a choice of locations for your locks. Add your location(s)—examples might be “Headquarters” or “Illinois”—and when you’re done, click “Close.”
2. Click the Setup menu again, then “Set up Buildings.” Add your buildings—Administration, Warehouse, etc.—and when you’re done, click close.
3. Repeat the process in Step 2 for Areas and for Floors.

Now it's time to set up your locks.

1. Click the "Lock Operations" menu and then "Add New Lock... "
2. The New Lock Setup box will pop up. Follow the on-screen instructions to set the time and date on your lock and get the information from the new lock into the AccessPilot software.

Note: Depending upon the lock model, the reset button is located just above or below the batteries on the back half of the lock.

As you progress through the steps, the "grayed-out" text will change to black.



3. When you complete the setup of your new lock, the screen above will appear. This screen gives you lots of control over the lock, as described below:

1 These tabs give general information about a lock, as well as let you set Lock Restrictions, which limit a user's access to between particular times and dates. See later sections in this manual for specific instructions on how to use each one. They include:

- **General:** Lists the lock's name, model and location.
- **Scheduled Lock Changes:** Sets the lock to remain in Classroom Mode or Storehouse Mode or sets the lock to switch from one mode to the other at a specified time. See the box at right to learn the difference between the two modes.
- **Daily Restrictions:** This function allows you to restrict a user's access to only particular days and times each week. You can have as many as 16 different categories of restrictions. Example: You can have one Daily Restriction give access only Monday through Friday, from 8 a.m. to 5 p.m., and a user's iButton will be able to operate the lock only on those days and between those times.
- **Date Restrictions:** This function allows you to give a user access only between two dates and times. **Example:** Let's say you have a contractor coming into your facility to do a job that will last three days. You could set up a Date Restriction for just those three days, apply it to an iButton, and give it to the contractor. The contractor's iButton would give him or her access to your facility for just those three days, and then their access would be denied.
- **Lockout Dates:** This function is essentially the opposite of Date Restrictions. It allows you to deny access

What's the difference between Classroom Mode and Storehouse Mode?

- **Classroom Mode:** Once the lock is opened, it will remain unlocked until an iButton is touched to the lock to lock it.
- **Storehouse Mode:** The lock will re-lock itself about 5 seconds after each time it is opened.

to certain users on particular dates and times. **Example:** Let's say Christmas falls on a Tuesday, you're closed Monday, Dec. 24, and Tuesday, Dec. 25, and you don't want to give some or all of your employees access to your facility between midnight Sunday night and midnight Tuesday night. You would create a Lockout Date that would run between those two times and dates.

- **Properties:** This shows a "snapshot" of the settings on the lock. (You retrieve the settings by clicking the Lock Operations menu and
- choosing "Get Lock Info.") The information is accurate as of the time you collected the information. The settings include whether the lock was in Storehouse or Classroom mode, whether Daylight Saving Time was enabled, the firmware version of the electronics in the lock and the number of users given access to the lock.

2 These fields describe the lock and its location.

3 This is the list of users who are available to be given access to the lock.

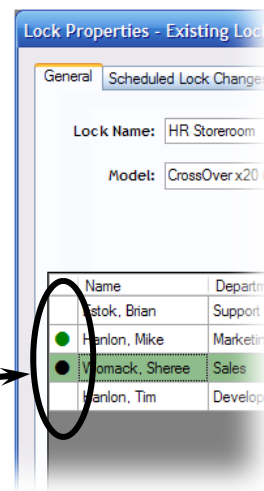
4. The "Name" field will be empty. Enter a name for the lock.
5. If you created a Location, Buildings, Floors and Areas in the previous section, use the drop-down menus on the right side of the screen to select the appropriate ones for this lock.
6. Continue with the instructions below to assign users to the lock. If you want to postpone that process and do it at a later time, click "Save."

Assigning users to the lock

At the most basic level, when you assign users to the lock, they have access 24 hours a day, 7 days a week. Here's how you give a user access to a lock:

1. While you're in AccessPilot's main administrative screen, double-click the name of the lock.
2. The Lock Properties screen will open showing you details about the lock you just double-clicked.
3. Click the field to the left of a user's name. A dot will appear, indicating that the user has access. This grants the broadest level of access—these users' iButtons will operate the lock 24 hours a day, 7 days a week. When the dot appears, you'll see that "No Expiration" now appears in the Date Restrictions field and "Full Access" appears in the Daily Restrictions field.
4. If that's what you want, click "Save" and follow the steps that will appear to transfer the instructions to the lock.
5. If you want to limit their access, for instance, to Monday through Friday from 8 to 5 p.m., see the next section on Lock Restrictions.

The dots indicate that the middle two users here have access to this lock, and the top user and bottom user do not.

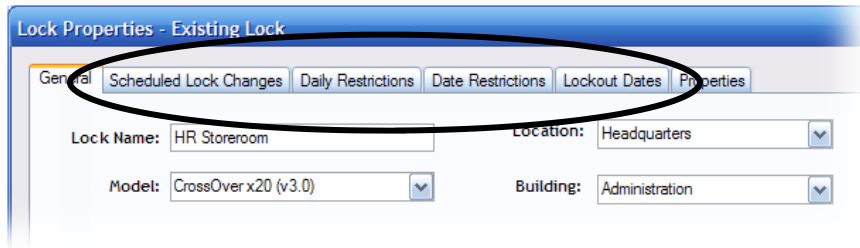


CrossOver Locks can handle as many as 500 users with iButtons or 500 users with four - to eight-digit keycodes.

Restricting Lock Access

In the previous section, you learned how to grant users access to a lock at any time by clicking the column to the right of their name in the Lock Properties screen. There may be occasions when you want to give users access, but restrict that access to something less than 24 hours a day and 7 days a week. Or perhaps you want to have

your lock automatically unlock at the start of business hours and lock at the close of business. To do these kinds of things, you'll work with the tabs across the top of the Lock Properties screen.



First, we'll describe each of the choices, then we'll show you how set them up. Finally, we'll show you how to apply them to your locks and users.

Scheduled Lock Changes

What are Scheduled Lock Changes?

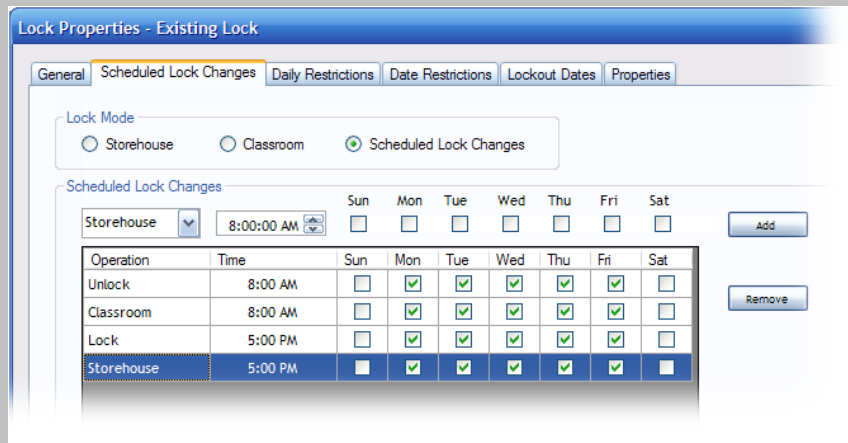
This function tells the lock to make a change to itself automatically, based on the time of day. The change can be from lock to unlock or vice versa and from Classroom to Storehouse Mode or vice versa or any combination of both. This might be used if you wanted your lock to unlock automatically at 8 a.m. Monday through Friday, lock at 5 p.m. Monday through Friday and remain locked over the weekend.

Setup

First, it's crucial that the lock have the correct time and date. To set it, see Page 16. Once that's done, you can create your Scheduled Lock Change.

1. Double-click the name of the lock you want to set up.
2. Click the Scheduled Lock Changes tab.
3. Now you have several choices:
 - o To simply put the lock into Storehouse Mode or Classroom Mode (see the definition of these modes on Page 10), click the button next to "Storehouse" or "Classroom." Then click the "Save" button and transfer the changes to the lock.

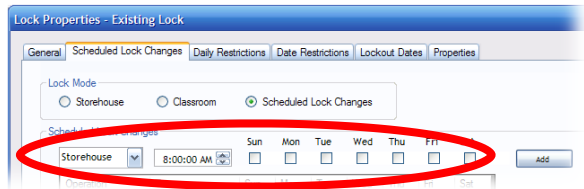
In the screenshot at right, we've created an example where the lock will unlock itself and go into Classroom Mode—remaining unlocked unless an authorized iButton is touched to it—at 8 a.m. on Monday. It will remain unlocked until 5 p.m. At 5 p.m., the lock will lock itself and switch to Storehouse Mode. It will remain in that state until Tuesday morning at 8



o'clock, when the process will repeat. The lock will continue opening at 8 a.m. and locking at 5 p.m. until Friday night, when it will remain locked and in Storehouse Mode until Monday morning.

- o To have the lock change based on a schedule, click “Scheduled Lock Changes.”

- A. The Scheduled Lock Changes panel will appear at the bottom of the screen. Build your schedule by choosing a mode, a time and days. (See the screenshot at right.)



- B. When you’ve made your choices, click “Add.” Continue in this manner until you have all the instructions to the lock completed.

4. Click the “Save” button and follow the instructions to transfer the changes to the lock.

Daily Restrictions

What are Daily Restrictions?

This function allows you to limit users’ ability to open a lock to certain times of day. This might be used if you had employees who worked a day shift and you did not want to allow them back into your facility at night. You’re allowed up to 16 schedules, and each schedule can have up to seven beginning and ending times.

Setup

First, it’s crucial that the lock have the correct time and date. To set it, see Page 16. Once that’s done, you can create your Daily Restrictions.

1. Click an unused field on the left side of the screen. (See screenshot at right.)
2. Type a name for the Daily Restriction in the appropriate box.
3. Now start building your Restriction: For the first parameter, click “Add.”
4. Choose a day, a beginning time and an ending time.

Note: You’re allowed up to seven “instructions” per restriction; they can be one per day, or you can have multiple instructions in a single day. For instance, if you wanted to give a user access on Tuesday between 8 a.m. and 5 p.m. and also from 7 p.m. to 9 p.m., those would take up two of your instructions. To add instructions, repeat steps 3 and 4.

5. Click the “Save Daily Restriction Changes” button to save the restriction you just created.

In this example, we’ve created a Daily Restriction called “Day Shift,” which will give selected users the ability to operate the lock only Tuesday through Saturday from 7 a.m. to 6 p.m. If this restriction has been assigned to your iButton Key, you won’t be able to operate the lock at any other time.

- Repeat the above steps for each Restriction you want to create. When you're done, click "Save and Close." You'll be asked if you want to transfer the information to the lock. If you want to transfer the information immediately, click the appropriate button and follow the instructions. If you want to transfer later, click the appropriate button and you'll be returned to the software's main screen.
- See Page 16 for instructions on how to assign this Restriction to a user.

Date Restrictions

What are Date Restrictions?

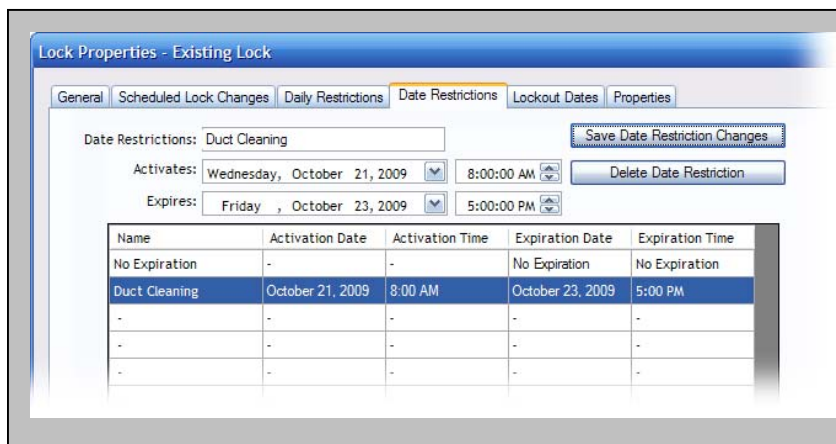
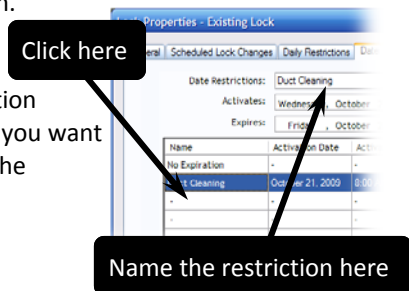
This function allows you to set up iButton keys that will allow a user to operate a lock for only a specified period of time. This might be used if, for instance, a contractor needed access to your facility for a short time, and you didn't want to give the person unlimited access.

You can have as many as 16 Date Restrictions.

Setup

First, it's crucial that the lock have the correct time and date. To set it, see Page 16. Once that's done, you can create your Date Restriction.

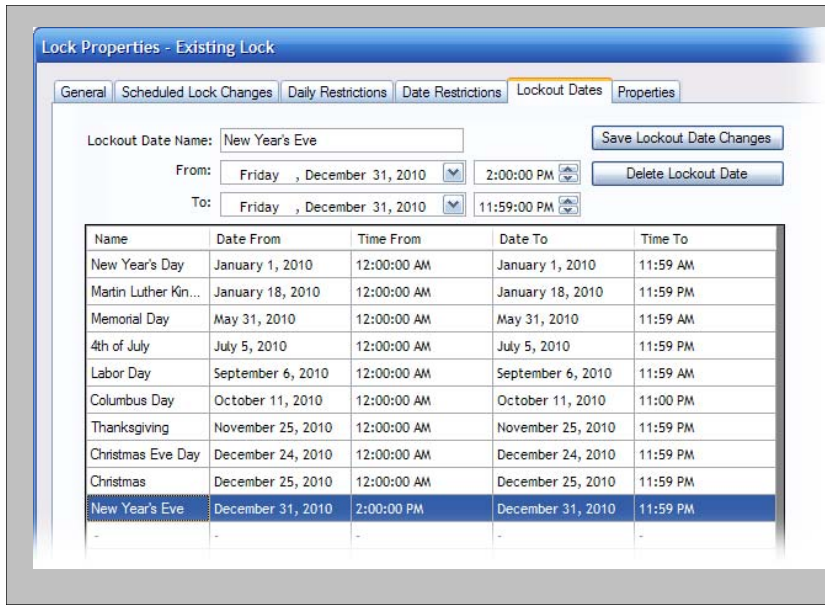
- Click an unused field in the "Name" column.
- Type a name for the Date Restriction in the appropriate box.
- Now start building your Restriction. Enter a date and time when access can begin, and then a date and time when access expires.
- Click the "Save Date Restriction Changes" button at the top of the screen.
- If you have more Date Restrictions, repeat steps 1 through 4. When you're done, click "Save and Close." You'll be asked if you want to transfer the information immediately, click the appropriate button and follow the instructions. If you want to transfer later, click the appropriate button and you'll be returned to the software's main screen.
- To finish the process, see Page 16 for instructions on how to assign this Restriction to a user.



In this example, we've created a Date Restriction for a company that will clean our facility's heating and air conditioning ducts. The iButton Key we give the company will operate the lock from 8 a.m. on Wednesday, October 21, 2009, until 5 p.m. Friday, October 23, 2009. The key will not operate the lock at other times.

Lockout Dates

What are Lockout Dates?



In this example, we've created a Lockout Dates schedule that consists of holidays in 2010. Most holidays will have a lockout period of 24 hours; on New Year's Eve the lockout begins at 2 p.m. and lasts until 11:59 p.m. You're allowed 16 dates in a Lockout Dates schedule. To apply the schedule to a particular lock and user, just double-click the lock in AccessPilot's main screen, then click the checkbox in the row containing the user's name in the list of users for the lock.

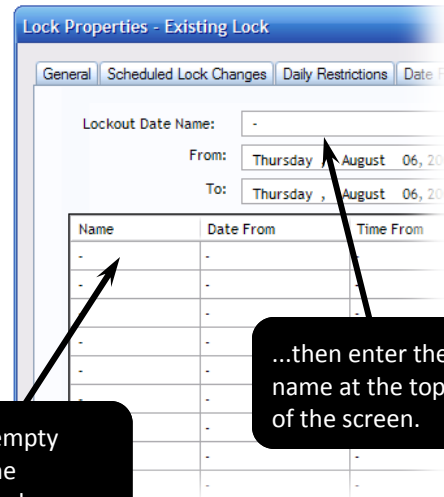
Lockout Dates are a group of days and times that users will not be allowed to operate a lock, even if they normally have 24/7 access. This function might be used to limit access to a facility on holidays, for instance. You can have as many as 16 Lockout Dates.

Please note: Unlike other Restrictions, you cannot choose which lockout dates will be applied to a user; either a user gets all the Lockout Dates or he or she gets none.

Setup

First, it's crucial that the lock have the correct time and date. To set it, see Page 16. Once that's done, you can create your list of Lockout Dates.

1. Click on an unused field in the "Name" column.
2. Give the Lockout Date a name in the field at the top of the screen.
3. Enter the starting date and time of the lockout in the appropriate boxes.
4. Enter the ending date and time of the lockout in the appropriate boxes.
5. Click the "Save Lockout Date Changes" button next to the Lockout Date name.
6. Repeat steps 1-5 for each Lockout Date. When you're done, click "Save and Close." You'll be asked if you want to transfer the information to the lock. If you want to transfer the information immediately, click the appropriate button and follow the instructions. If you want to transfer later, click the appropriate button and you'll be returned to the software's main screen.
7. To finish the process, see Page 16 for instructions on how to assign this Restriction to a user.



Click an empty field in the "Name" column...

...then enter the name at the top of the screen.

Properties

What are Properties?

See the explanation on Page 16.



Assigning Restrictions to users

Now that you have set up your Restrictions, you can assign them to the users of your locks. The procedure is the same no matter which Restriction you're using. Here's how to do it:

1. Start the software and double-click the name of the lock whose use you want to restrict.
2. You'll see a list of users at the bottom of the screen. Users who have been given the ability to operate the lock have green dots in the first column, next to their names.
3. By default, those users get full, 24-hours-a-day, 7-days-a-week access to the lock. Because of that, you'll see "No Expiration" in the Date Restrictions column and "Full Access" in the Daily Restrictions column.
4. If you want to set a Date Restriction, double-click the words "No Expiration" in the row of the users whose access you want to limit. A drop-down menu will appear, listing all the Restrictions you have created. Click on one you want to apply to this user.
5. Do the same for Daily Restriction, if desired.
6. If you want to apply your Lockout Dates to a user, click the checkbox in the appropriate row.
7. When you are done, click "Save."
8. You'll be asked if you want to transfer your settings to your lock. If you want to make the transfer now, click "Transfer Lock Settings..." and follow the instructions that appear. If you want to make the transfer later, click the appropriate button. **Please note:** Your Restrictions will not go into effect until you have transferred them to the lock.

1. Double-click the Restriction field.

2. Choose a Restriction.

3. Click Save.

4. Transfer the new settings to the lock.

Name	Department	iButton	Keycode	Date Restrictions	Daily Restrictions	Lockout	Last Update
Estok, Brian	Support	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No Expiration	Full Access	<input type="checkbox"/>	-
Harion, Mike	Marketing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No Expiration	Full Access	<input type="checkbox"/>	8/10/2009 2:58:39 PM
Womack, Sheree	Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No Expiration	Full Access	<input type="checkbox"/>	8/10/2009 2:58:39 PM
Harion, Tim	Development	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Duct Cleaning	-	<input type="checkbox"/>	-
				Floor stripping	-		



Other Lock Operations

Setting the time and date on your lock

There are two ways to set the time and date on your lock. The first uses just your yellow Program Key; the second

uses an optional teal-colored DS1994 iButton, which has a running clock inside it. Here's the difference:

- There is no clock inside the Program Key, so if your lock is far from your PC, the clock in your lock will be off by the number of seconds or minutes it takes for you to unsnap the Program Key from the Blue Dot Receptor, travel to the lock and tap it to the lock's iButton probe. If you use this method and your lock is far away, it's a good idea to set the time to a few seconds or minutes later to allow for the amount of time it takes to bring the Program Key from the computer to the lock.
- The teal-colored DS1994 iButton has a running clock inside it. When you transfer the time from the software to the DS1994 iButton, the clock starts running and keeps accurate time. When you touch the iButton to the lock, the accurate time is transferred.

Whichever iButton you use, the process of setting the time and date on the lock is the same:

1. Start the AccessPilot software.
2. Snap your Program Key or DS1994 Key into the Blue Dot Receptor.
3. Click the Lock Operations menu and choose "Set Lock Date and Time... ."
4. A box will pop up containing the date and time that's currently on your PC. You can accept that time or change the time and date to anything you choose. If you want the clock to automatically correct for Daylight Saving Time, click the appropriate box.
5. Choose the kind of iButton you're using (see the introduction to this topic for details).
6. Click the "Load Instruction" button.
7. When the instructions have been loaded onto the Program Key, unsnap it from the Blue Dot Receptor and hold it to the lock's iButton receptor.
8. To have the lock automatically correct its clock for Daylight Saving Time, see Page 16.

Set Lock Parameters

What are Lock Parameters?

There are two lock features that can be set here:

- The time that the lock delays before re-locking when it is in Storehouse Mode. (In Storehouse Mode, the lock is opened with a touch of an iButton, remains unlocked for a set number of seconds, and then re-locks itself.)
- Whether the red LED in the lock's iButton probe should blink. The blinking red light makes it easier to see where to touch your iButton in dark areas, but it is a slight draw on the batteries. (For advice on battery life, see page 4.)

Here's how to set up both parameters:

1. Start the AccessPilot software.
2. Snap your Program Key into the Blue Dot Receptor.
3. Click the Lock Operations menu and choose "Set Lock Parameters... ." The Lock Parameter Setup box will pop up.
4. By default, a lock in Storehouse Mode remains open for 5 seconds before relocking itself. If you want to change that to anything from 0 seconds to 25.5 seconds, change the number in the field at the top of the box.
5. By default, the red LED on the lock is set not to blink. If you want to have it blink, click the appropriate button in the Lock Parameter Setup box.
6. Follow the three steps at the bottom of the box.

Adding users to the software

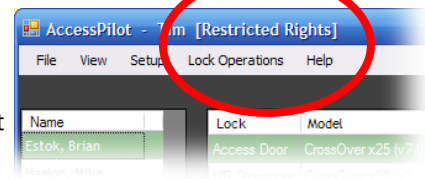
What does adding users to the software mean?

There may be times when you want to give another person access to the AccessPilot software so they add users and iButtons, see who has permission to use a lock, check audit trails and assign restrictions to users.

There are two levels of access:

- **Administrative rights:** This level gives the user full permission to perform all the functions of the software.
- **Non-Administrative rights:** In this level, the user has limited power in the AccessPilot program. Generally, they can view settings and other information, but can't make changes or add users or locks to the system. All they can do is:
 - Retrieve and view audit trails from locks (see the next section for a definition).
 - Retrieve lock information.
 - View user profiles.
 - See all lock properties (general information, who has been authorized to operate the lock, restrictions that have been set up and assigned to users).

How can you tell which level you have? If you don't have Administrative rights, "Restricted Rights" will appear in the title bar and the "Administrative" menu won't appear in the menu bar. (See screenshot at right.)



Here's how to give another person access:

1. Start the AccessPilot software and make sure you have administrative rights.
2. Click the "Administrative" menu and choose "Login User Setup ..."
3. Click "Add user."
4. Enter the user's first and last names and give them a login name. The login name will be case-sensitive.
5. Click the "Change Password" button. The Change Password box will pop up.
6. Enter the desired password twice and click OK to close it. Passwords are also case-sensitive.
7. If you want to grant the new user administrative rights, click the appropriate checkbox.
8. Click "Close." The name will appear in the list of those with login rights.

Get Audit Trail

What is Get Audit Trail?

Every CrossOver Lock has memory, and it remembers who used it and when. The Get Audit Trail function enables you to download that information from a lock. This is useful if, for instance, you want to see if a particular person accessed the lock at a certain time. One of our clients even used it to solve a crime: After a theft, the client downloaded the lock's audit trail and found that an employee had accessed the lock many hours after his shift was over.

Here's how it works:

- Each time an iButton is tapped to the lock, the lock records the date, the time, the iButton number and what occurred next (the lock opened, it locked, it refused to open, it downloaded information, etc.)
- When you retrieve the Audit Trail and import it into the AccessPilot software, the software matches up the iButton number from the lock with the names and iButton numbers in the software.
- The AccessPilot software then displays the information in a table arranged by time.
- To print the audit trail, click "Print Preview."
- To view (and print) a compilation of all previously retrieved audit trails, click "View" in the menu bar and choose "View Audit Trail."

Here's how to retrieve the audit trail from your lock and display it:

1. Start the AccessPilot software and log in.
2. Click the “Lock Operations” menu and choose “Get Audit Trail... ”
3. The “Lock Audit Trail” box will pop up.
4. Choose the number of records to retrieve from the lock. The default is the last 100 times an iButton was touched to the lock (whether the lock opened or not). If you want more than the last 100 records, choose a number from the drop-down menu. The maximum is 4,000 records.
5. Follow the on-screen instructions to download the data to your Program Key and import it into the AccessPilot software.

Day	Date	Time	Lock	User	Transaction Type	iButton	KeyCode
Tue	Aug 11, 2009	10:36:59 AM	HR Storeroom	Womack, Sheree	Unlock - Lock	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:37:05 AM	HR Storeroom	Marsh, Doug	Denied - Invalid iButton	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:37:20 AM	HR Storeroom	Womack, Sheree	Unlock - Lock	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:37:23 AM	HR Storeroom	Hanlon, Mike	Unlock - Lock	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:37:30 AM	HR Storeroom	Estok, Brian	Unlock - Lock	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:37:42 AM	HR Storeroom	Hanlon, Tim	Unlock - Lock	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:37:50 AM	HR Storeroom	Marsh, Doug	Denied - Invalid iButton	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:37:57 AM	HR Storeroom	Hanlon, Tim	Unlock - Lock	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:38:03 AM	HR Storeroom	Estok, Brian	Unlock - Lock	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:38:08 AM	HR Storeroom	Hanlon, Mike	Unlock - Lock	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:38:13 AM	HR Storeroom	Womack, Sheree	Unlock - Lock	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:38:18 AM	HR Storeroom	Marsh, Doug	Denied - Invalid iButton	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:38:19 AM	HR Storeroom	Marsh, Doug	Denied - Invalid iButton	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:38:23 AM	HR Storeroom	Marsh, Doug	Denied - Invalid iButton	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:38:31 AM	HR Storeroom	Estok, Brian	Unlock - Lock	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:38:36 AM	HR Storeroom	User Unknown	Denied - Invalid iButton	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:38:43 AM	HR Storeroom	Womack, Sheree	Unlock - Lock	<input checked="" type="checkbox"/>	
Tue	Aug 11, 2009	10:38:56 AM	HR Storeroom	Hanlon, Tim	Unlock - Lock	<input checked="" type="checkbox"/>	

Above is a sample audit trail. Some background on the sample:

- The lock is set in Storehouse Mode, which means that it re-locks itself five seconds after it is unlocked.
- Entries in green are successful operations: the user was authorized to perform the function described. Entries in red indicate an unsuccessful operation. For example, the user was not authorized to operate the lock at all or the user wasn't authorized to operate the lock at that time.

- 1 An explanation of the first row: On Tuesday, August 11, 2009, at 10:36:59 a.m., Sheree Womack unlocked the HR Storeroom lock with her iButton. The lock re-locked itself 5 seconds later.
- 2 An explanation of the second row: On Tuesday, August 11, 2009, at 10:37:05 a.m., Doug Marsh tried to unlock the HR Storeroom lock with his iButton. Access was denied, because even though his name and iButton are listed in the software, he was not an authorized user of this particular lock. If he had used a keycode to try to open the lock, the keycode he used (whether it worked or not) would be displayed in the last column.
- 3 An explanation of the 16th row: On Tuesday, August 11, 2009, at 10:38:36 a.m., an unknown user tried to unlock the HR Storeroom lock with his iButton. Access was denied. The user is unknown because the person's iButton does not appear in the AccessPilot database.

Lock Override

What's Lock Override?

With this function you can set the lock to remain locked or remain open until the Program Key is touched to the lock again. If you do this, the settings for individual iButton keys are ignored. Therefore, if the lock is set to “Always Open,” it remains open until the Program Key is touched to it, and anyone can enter; if it’s set to “Always locked,” no one can get in until the Program Key is touched to the lock.

The second touch by the Program iButton cancels the override and returns normal functionality to the lock. Here’s how to set it up:

1. Start the AccessPilot software and enter your username and password.
2. Click the “Lock Operations” menu and choose “Set Lock Override” from the menu that appears.
3. Make your choice—Always Open or Always Locked—and follow the directions on the pop-up screen.

One-Time-Use Keypad Setup

What is One-Time-Use Keypad Setup?

If your lock has a keypad (CrossOver X25 or X15), you can set as many as 10 four- to eight-digit codes that will allow one-time access to the lock. These could be used if, for instance, a repairman needed access to your facility. They could punch in their one-time keycode and enter your facility. Note: Once the code is used it cannot be used again, so you have a total of more than 11 million combinations.

Here’s how to set it up:

1. Start the AccessPilot software and enter your username and password.
2. Click the “Lock Operations” menu and choose “One-Time-Use Keypad Setup” from the menu that appears.
3. Follow directions on the pop-up screen.



Questions and answers

How do I ...

- ... **Set up the lock I’ve just purchased?** See Page 9.
- ... **Add users to my lock?** See Page 11.
- ... **Set up a user of the lock so they can operate the lock only on certain days between certain times?** See Page 13.
- ... **Set up a user so they can operate the lock only between certain dates?** See Page 14.
- ... **Set up a user for one-time use of a lock with a keypad (CrossOver X15 and X25)?** See Page 21.
- ... **Set the time and date on my lock?** See Page 16.
- ... **Tell whether I have the optional DS1997 iButton key, which contains an internal clock?** See Page 17.
- ... **Lock out everyone from my facility, for instance on a holiday, even though users ordinarily would have access on that day?** See Page 14.
- ... **Tell the difference between Classroom Mode and Storehouse Mode?** See Page 10.
- ... **Set the lock to automatically unlock or lock at a certain time and day?** See Page 12.
- ... **Find the reset button on my lock?** See Page 4.
- ... **Know when to replace the batteries on my lock?** See Page 4.
- ... **Open the lock if the batteries are dead?** See Page 4.
- ... **Know whether I have a 32-bit or a 64-bit version of Windows?** See Page 5.

- ... **Get the data from my old iKeypad software into AccessPilot?** See Page 22.
- ... **Set up a new user and assign him or her an iButton key?** See Page 8.
- ... **Find out where on my computer network my lock data is being stored?** See Page 6.
- ... **Make the red LED on the lock blink, so I can see it at night.** See Page 17.
- ... **Give another person the authority to assign iButton keys and make changes to my locks. Or give another person the authority to see who has access to locks, but NOT the authority to make changes or add users.** See Page 17.
- ... **Make changes to a user's profile.** See Page 8.
- ... **Change my Security Code, which confirms to your locks that your copy of the AccessPilot software has the authority to make changes.** See Page 6.
- ... **Set up my Blue Dot Receptor.** See Page 5.

Technical support

If you experience any difficulty installing or operating the AccessPilot software, please contact TimePilot Technical Support at 1-630-879-6400, Ext. 104 or e-mail Technical Support at Support@TimePilot.com. See the CrossOver Lock web site—www.CrossOverLock.com—for more tips and other information about the locks.



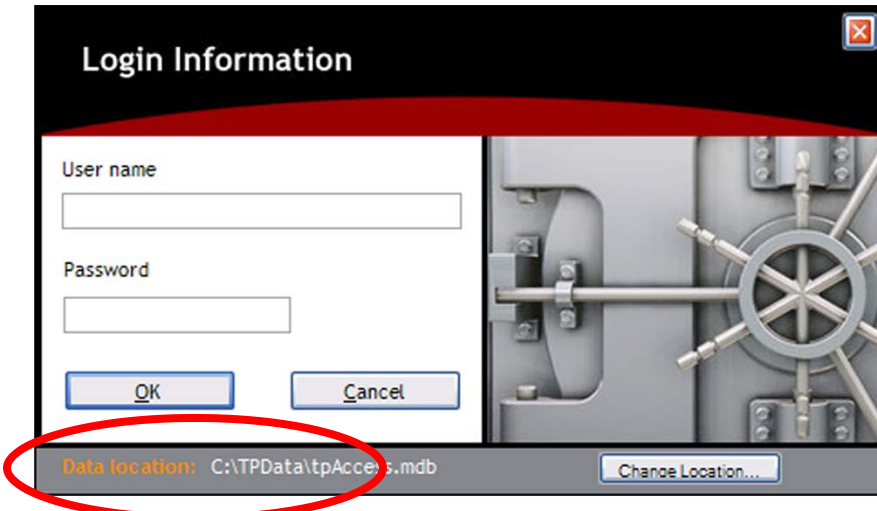
Appendix I: Lock Specifications

- Keypad (if applicable): 12 all-weather numeric buttons.
- Keypad Functions: Temporary codes, permanent codes, audit trail of permanent codes used listing code, time, user name and whether entering or leaving.
- Power supply: 4 standard AA batteries with a weatherized battery pack for all weather conditions.
- Power supply life expectancy: 10,000 operations. Low battery warning when system drops below 4.8 volts.
- Memory retention: Flash memory never loses memory, even without power.
- Programming/Communication method: Via Program iButton; no annoying wires.
- iButton functions: Locks can be programmed to lock or unlock at specified times or dates; individual iButtons can be granted ability to operate lock at specified times or dates; programmable exception dates (holidays); temporary access.
- Finishes: Stainless steel or brass. Materials: Zinc alloy
- Handle: Lever.
- Audit trail: Maximum 4,000-event audit trail.
- iButton users: 500.
- One-time-use keypad codes: 10; permanent keypad codes: 500.
- Anti-tamper: Red warning light stays on for 60 seconds after three consecutive invalid code entries.
- Key bypass: Standard Schlage C6 on all units.
- Door preparation: Standard ANSI A115 Series Prep, modified by adding additional 5/8" through-bolt holes to add stability to the lock and increase security.
- Strike plate: ANSI Standard 115.3. Square corner, 1-1/8 x 2-3/4 inch T strike with 1-1/4 lip-to-center dimension.
- Latch: 2 3/4 inch backset standard (2 3/8 inch backset optional); solid brass with 1/2 inch throw. 1-inch diameter bore is required.
- Temperature: 0°F-120°F (-18°C-50°C)
- Exposure: All weather conditions
- Accessibility standard: Meets ADA (Americans with Disabilities Act) standards.



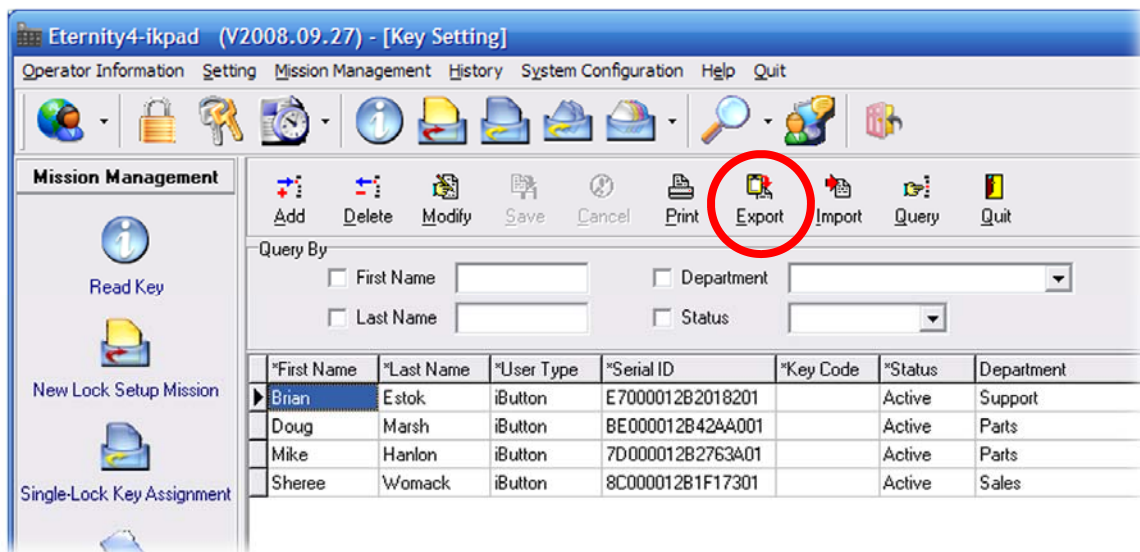
Appendix II: Importing lock data from iKeypad Software into AccessPilot

Moving your lock and user settings from your old iKeypad software into the new AccessPilot software is a simple process. First, you'll export the data in spreadsheet format; then you'll import the data into AccessPilot. Before you start, you should know where on your hard drive you're storing your AccessPilot data. How do you determine that? Start the AccessPilot software. The location is listed at the bottom of the login screen. In the screenshot below, the data is on the C: drive, in a folder called TPData.

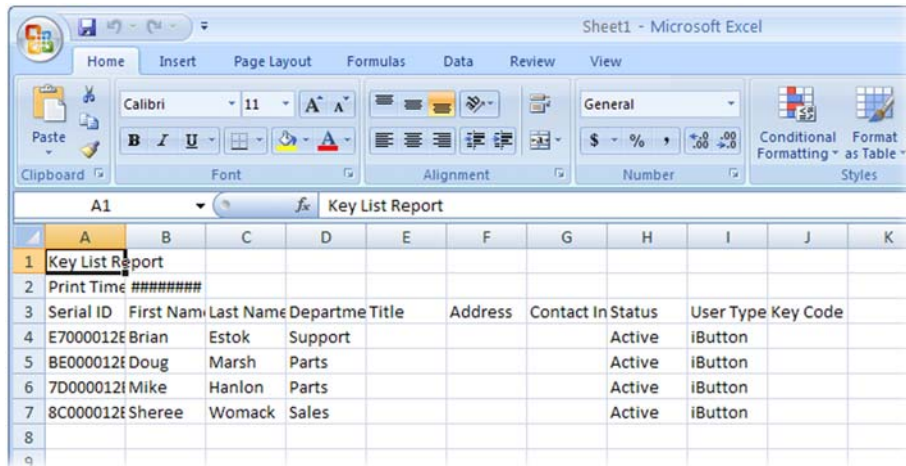


Here's how to start the export process:

1. Start the iKeypad software and log in.
2. Click the Key Setting icon (shown at right).
3. When the list of users appears (see screenshot below), click the "Export" button.



- Microsoft Excel will open with the data in spreadsheet format.



- Name the spreadsheet Users.xlsx (or Users.xls if you have an older version of Excel) and save it to the “Import-Export” folder that is in the folder that holds your AccessPilot data. (See the opening paragraphs of this section to determine its location.)

Now you’ll go through the same process with your locks.

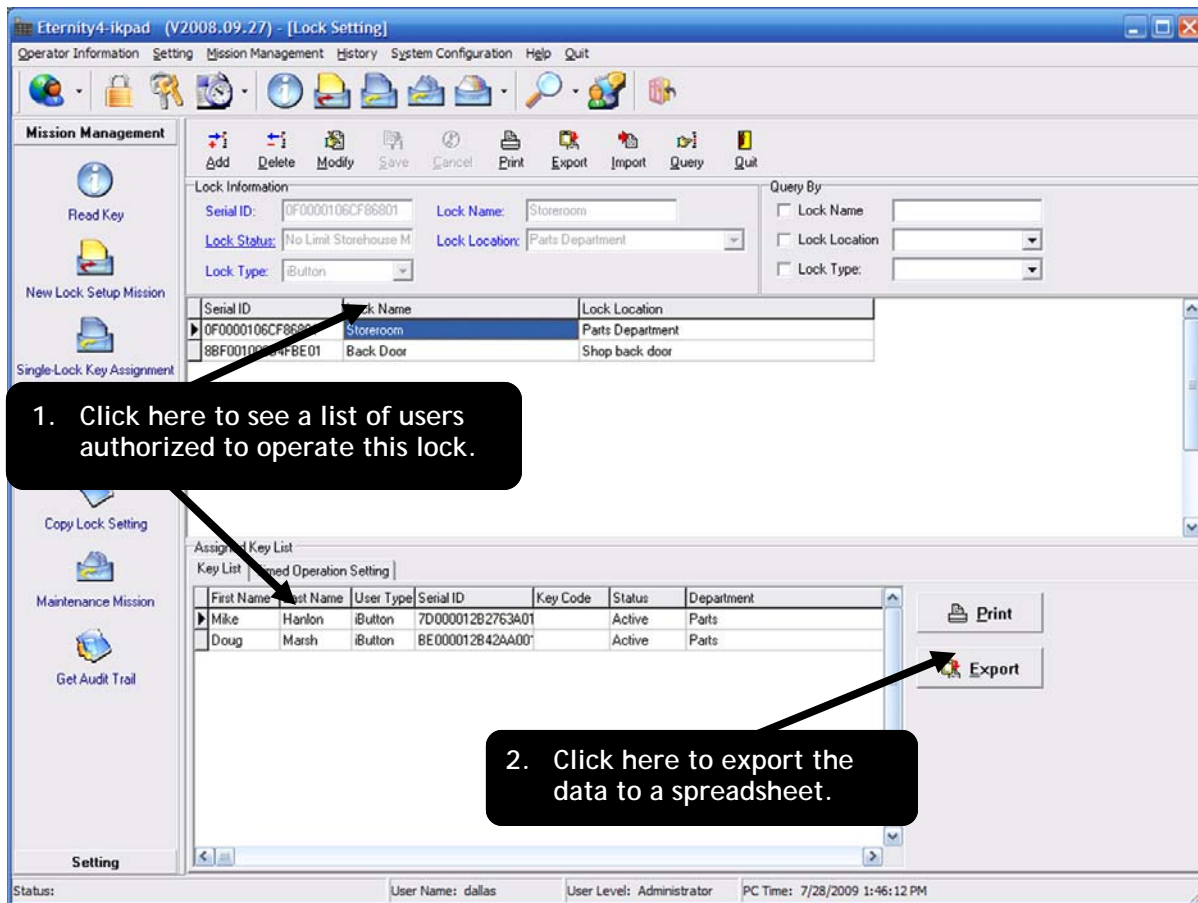
- Click the Lock icon at the top of the iKeypad software screen to display a list of your locks. (See screenshot at right)
- When the list of locks appears (see screenshot below), click the “Export” button.



- Name the spreadsheet Locks.xlsx (or Locks.xls if you have an older version of Excel) and save it to the “Import-Export” folder that is in the folder that holds your AccessPilot data.

Finally, you’ll create a spreadsheet for each lock that lists its authorized users.

- Still at the list of locks, click on the name of the first lock. The list of authorized users will appear at the



bottom of the screen. (See screenshot above.)

2. Click the Export button to the right of the Key List.
3. Name the spreadsheet Authorized-XXXX.xlsx (where XXXX is the name of the lock) and save it to the "Import-Export" folder that is in the folder that holds your AccessPilot data.
4. Repeat Steps 1-3 for each lock in your list.

In the Import-Export folder you should now have a spreadsheet listing users, a spreadsheet listing your locks and a spreadsheet for each lock, listing its users.

All that remains is to tell the AccessPilot software to import that information. Here's how:

1. Start the AccessPilot software and log in.
2. From the File Menu, click "Import iKeypad Data."
3. The box at right will pop up. Check to make sure the import location is correct, then click the "Import" button.
4. A box will pop up when the importation process is complete. Click OK to clear the box, then the "Close" button to clear the Import Keypad Data box. Your locks and users will appear, verifying that your data has been imported and the process is complete.

