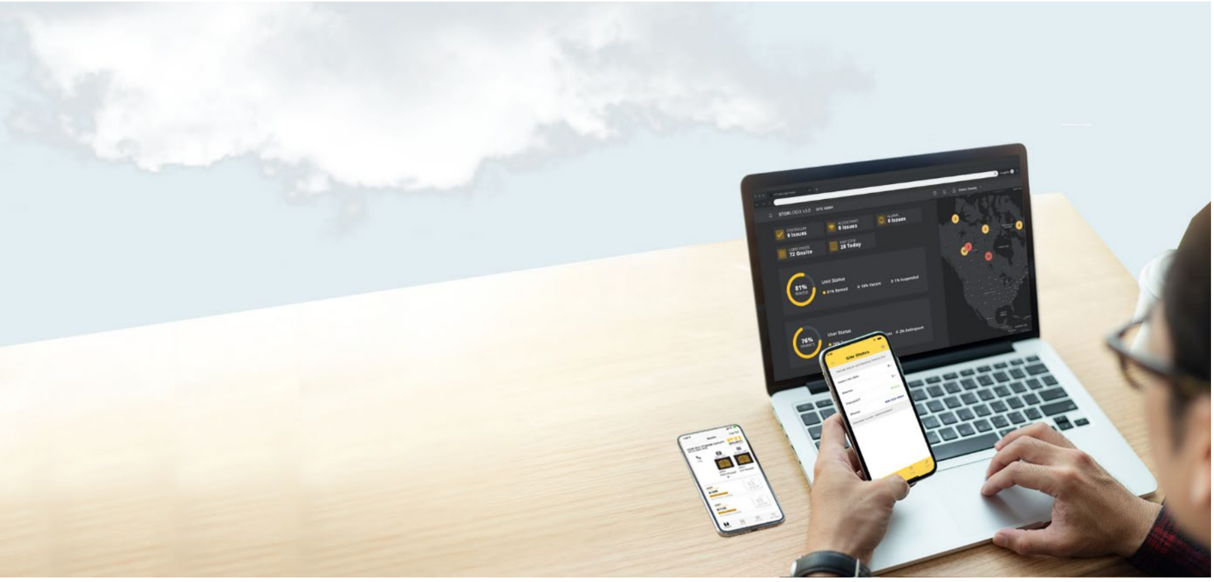
StorLogix Cloud and FalconXT User Guide



Getting Started:

New To StorLogix

- If your facility is NOT currently using StorLogix Desktop, then go directly *Non-StorLogix Desktop Site – Cloud Install* to see steps to configure your cloud instance directly in StorLogix Cloud.

StorLogix Desktop Upgrade To Cloud

- If your facility IS currently using StorLogix Desktop, and you are upgrading to StorLogix Cloud, then follow the recommended steps below to get started.

Cloud Adapter + Falcon XTCloud

- If your operation will utilize a legacy Falcon XT controller, you will need to contact your PTI sales rep, who will coordinate the shipment of the Cloud Adapter. This device is a small computer that retrofits the Falcon XT to communicate over the Internet. A Preferred Partner licensed to install PTI access control systems can also help you with this upgrade.
    - The Cloud Adapter install is very simple. You will receive a USB cord with the Cloud Adapter. Plug this into the Cloud Adapter and USB port on your Falcon XT board. **IMPORTANT**: Only connect the Cloud Adapter to the Falcon XT on the day of the install as directed by your PTI Installer. If you connect this device too early, your site could experience communication issues.

Installation & Walkthrough:

- Your PTI Installer can perform the installation remotely. In many cases, they will be in contact with you or your employees at the site to connect the Cloud Adapter and might also request remote access to your current onsite PC. The Installer will set up StorLogix Cloud, StorLogix Mobile, and EasyCode during the installation, which will provide a cloud solution for you, your site operators, and tenants alike.
    - Immediately following the installation, your PTI Installer will ensure each piece of software is configured properly. They will then provide a Walkthrough of each new solution. Feel free to ask as many questions as you would like during that Walkthrough. Be sure to ask about setting up a separate training session for all levels of your staff. We have a dedicated training team that can provide walkthroughs as needed.

Site Hierarchy & Operators:

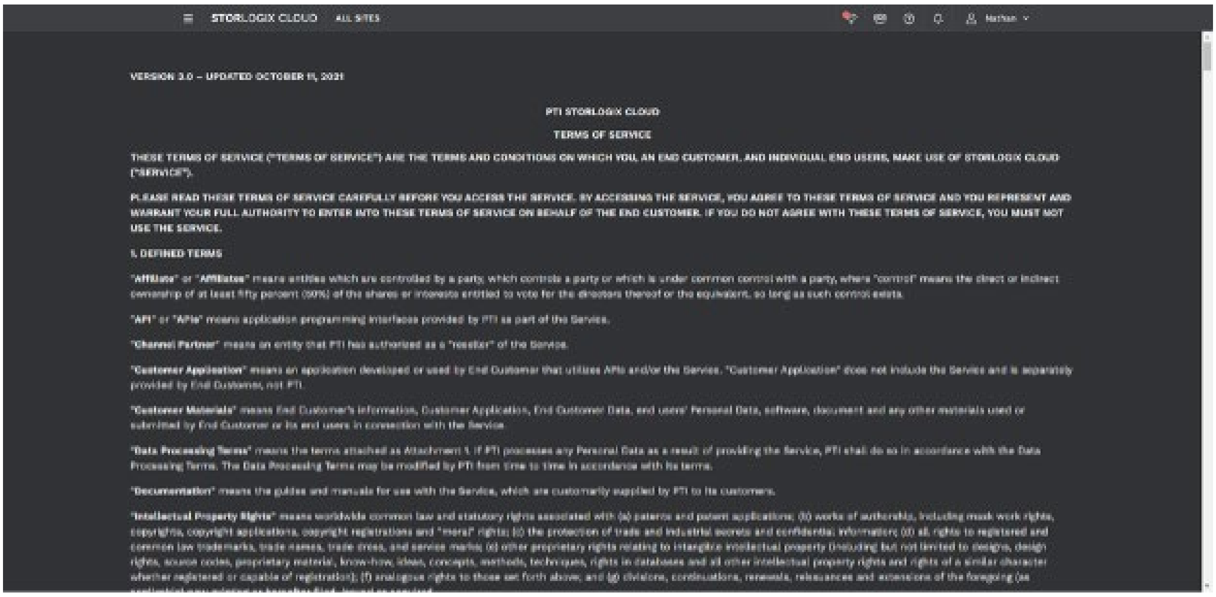
- Following the Walkthrough, the PTI Installer will distribute new login credentials to the site's operators. For multi-site operations, the Installer will also set up Site Hierarchy based on your organization's needs. This allows for site segmentation and ensures that only Operators can view and control sites they manage. See the Multi-Site Hierarchy and Site Hierarchy sections for more details.
    - Operators are the software users at each site. They are assigned to a specific level in the Site Hierarchy. The Installer will initially set these up, but an administrator on your team can reassign operators at any time. See the Operators section for more details.

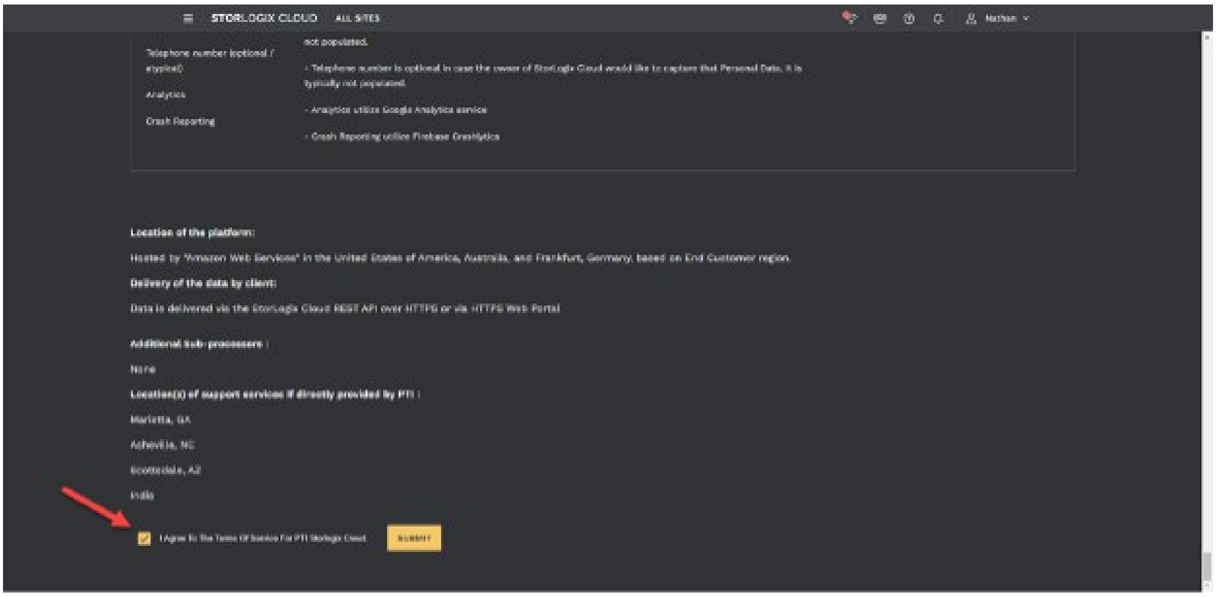
Non-StorLogix Desktop Site – Cloud Install:

With the latest updates, Operators and Installers no longer need to install StorLogix Desktop before StorLogix Cloud. You can now configure a site directly in the cloud. The following steps detail this configuration process.

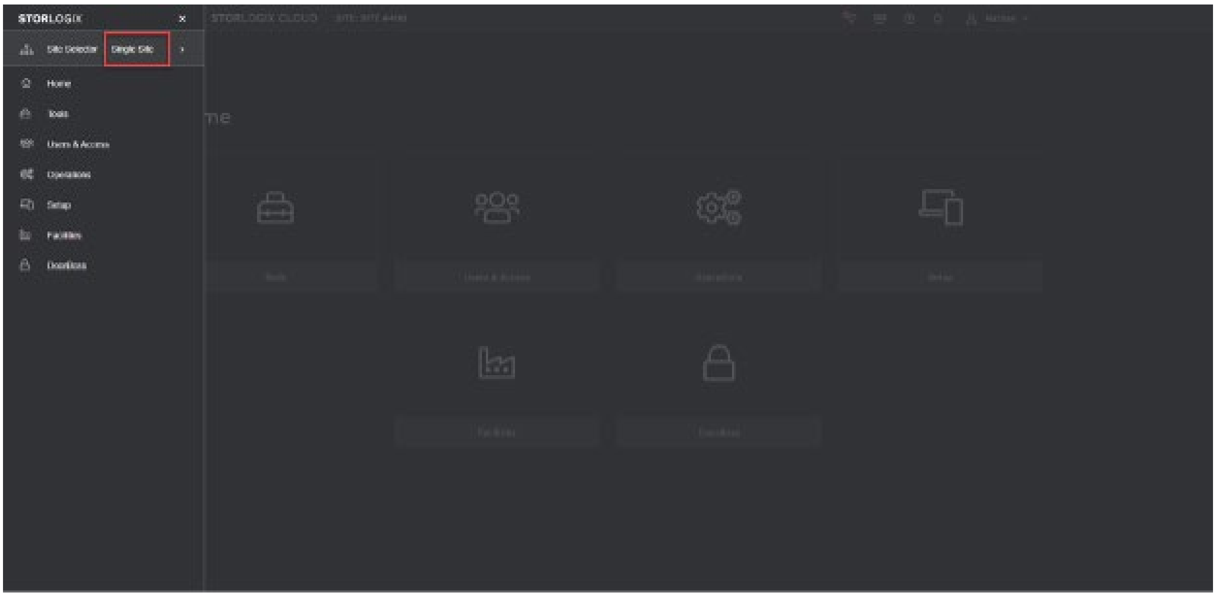
Enter the login credentials you were provided from PTI:

- Click **Login**, and then read and agree to the **Terms of Service**:

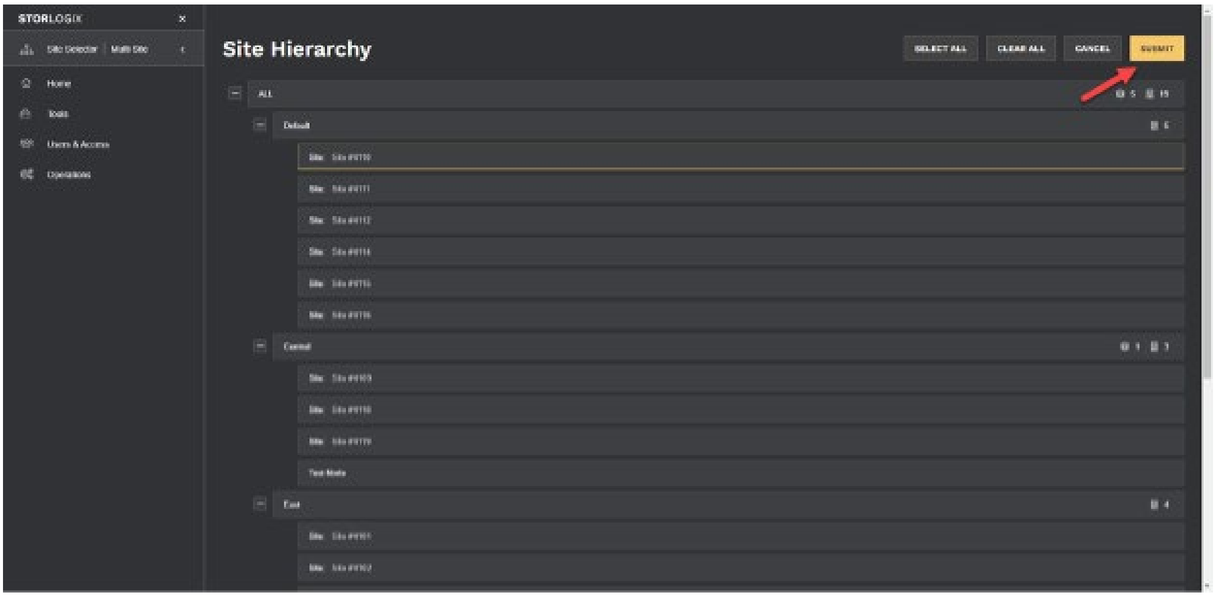




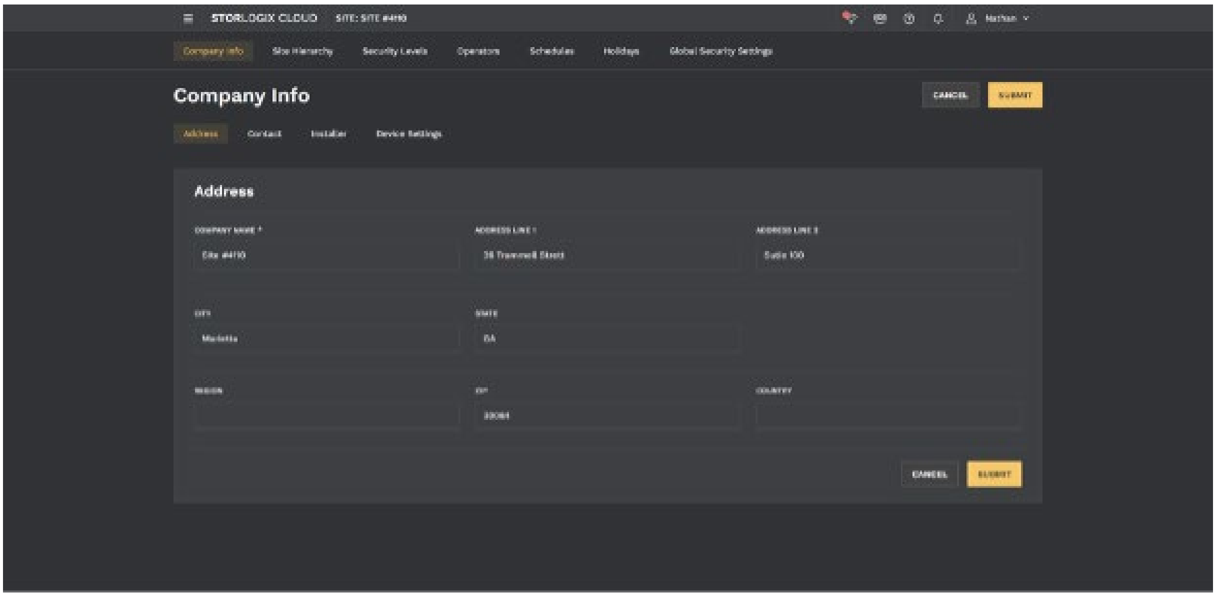
- After signing in be sure to be in **Single-Site** To be sure, click on the **Navigation Menu** in the top left and check the **Site Selector** row. It will either say **Single-Site** or **Multi-Site**.



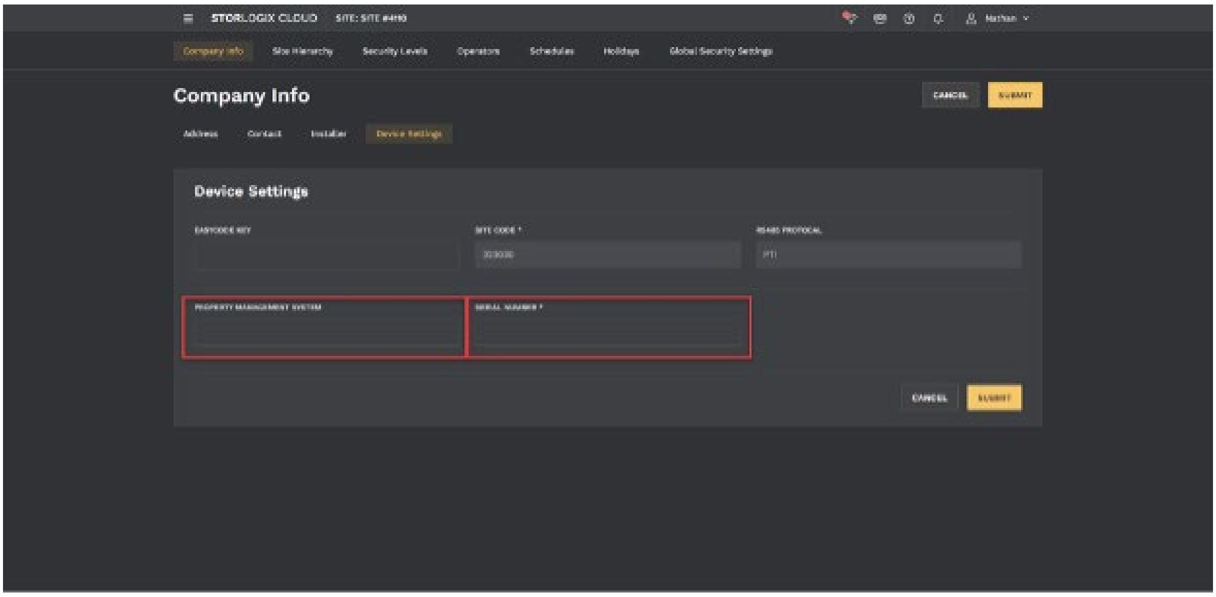
- If the site is in **Multi-Site** mode click the arrow and then select the specific site you wish to configure. Then click **Submit**.



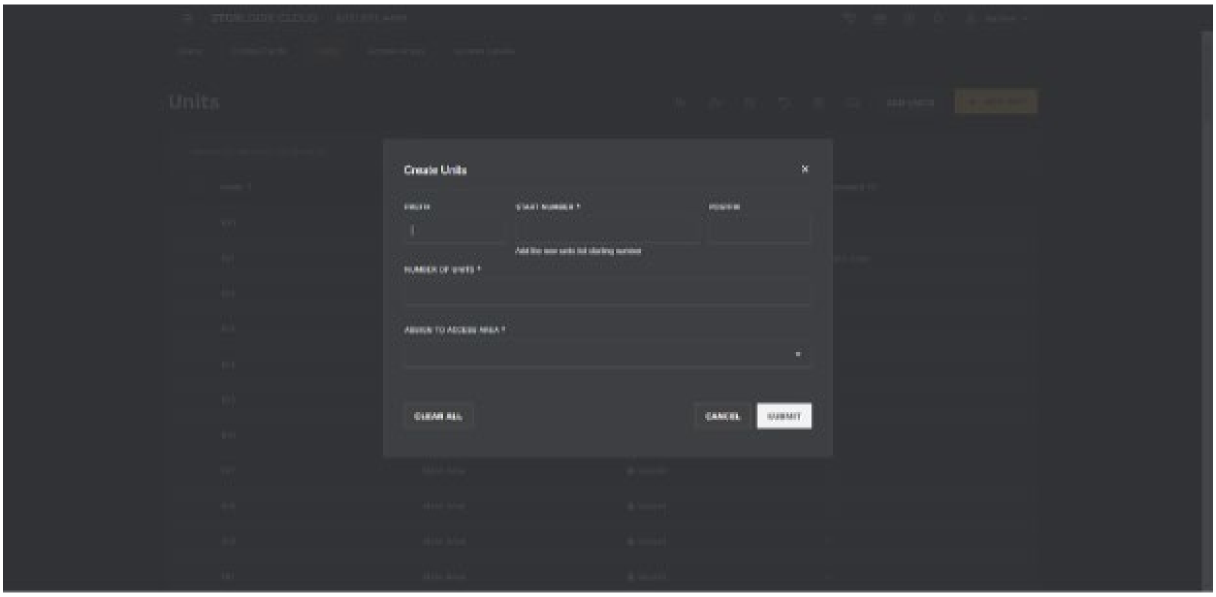
- Once you have ensured you're in **Single-Site** mode you will want to fill out the **Company Info**.
    - Click **Operations > Company Info** > **Edit**.



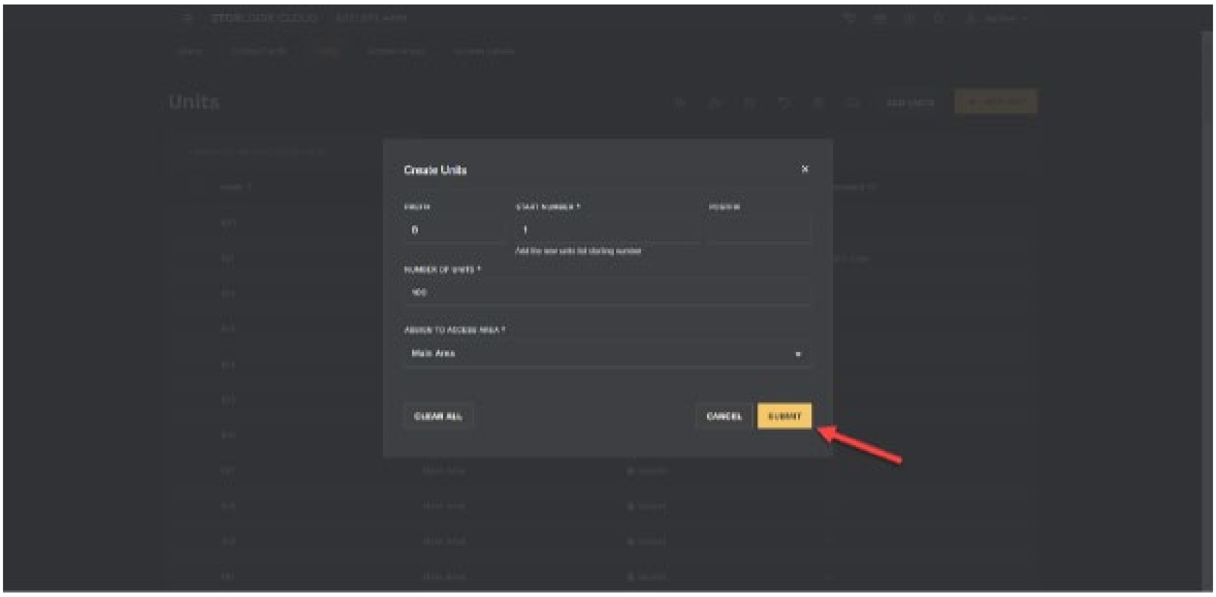
- Fill out all 4 tabs in **Company Info** being sure to click **Submit** after each correctly filled out tab.
    - On the final tab, **Device Settings**, the **SiteKey**, **SiteCode**, and **Protocol** will be pre-populated and should not be edited.
    - Fill out the last 2 fields, **Property Management System**, and **Serial Number**, which is the Cloud Adapter serial # found on the label (Red Arrow below).



- Now it's a good time to connect the facility's **Property Management Software** to **StorLogix Cloud**.
    - There are 2 ways to connect a PMS to StorLogix Cloud.
        - **API integration** or the **BridgeApp**
    - There are currently 9 Cloud to Cloud API Integrations complete (List Below)
        - ***CubeSmart's HIVE***
        - ***Domico Cloud***
        - ***DoorSwap***
        - ***Hummingbird***
        - ***Open Unit***
        - ***Self-Storage Manager (SSM 2.0)***
        - ***Syrasoft***
        - ***Yardi Breeze***
        - ***Yardi Centershift***
- If your PMS is anyone of these, use the *{SiteCode}* credentials and the **SiteCode** and **SiteKey** that were provided by PTI, and enter them into your PMS Gate Integration page. If you encounter issues with setting up the cloud-to-cloud integration, contact the PMS' tech support for help.
- If you're not using one of the PMS groups listed above, then utilize our BridgeApp.
    - See the **BridgeApp** instructions below to complete the connection. These instructions can be found in the **BridgeApp Installation** section of this User Guide.
- Finish completing setup in the PMS, and once all Users and Units are added in the Property Management Software, perform a full **Gate Update** to **StorLogix Cloud**.
    - Again, if you encounter issues here, please reach out to the PMS tech support team to assist setup.
- If you plan to set up Units manually through **StorLogix Cloud**, then go to **Users & Access** > **Units** > **Add Units**.
    - This will allow you to create up to 100 units at a time.

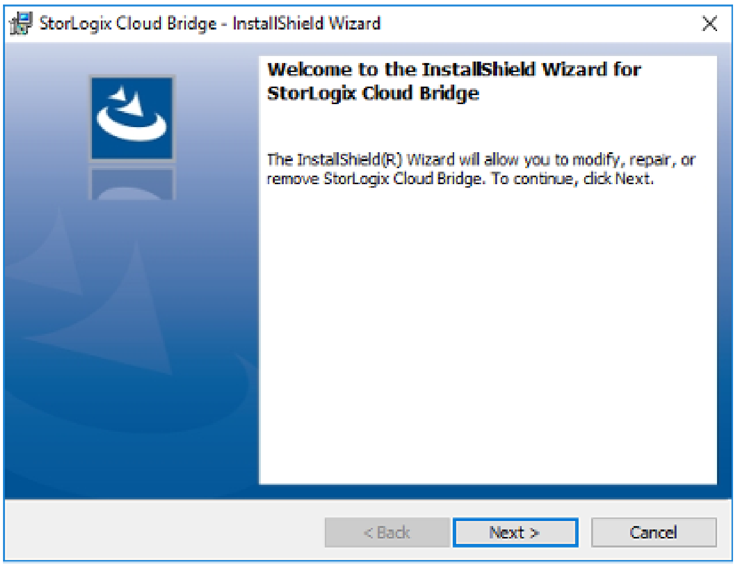


- Be sure to set the starting number, and the number of sequential units you'd like to add at once.
    - After assigning to an **Access Area**, then hit **Submit**.



- If your Property Management Software company is not yet integrated into the PTI API, then the **BridgeApp** will be required. The StorLogix Cloud **BridgeApp** is a service that's primary purpose is to process property management software flat files. The BridgeApp serves as an integration or "Bridge" between your property management software and StorLogix Cloud. *It's important to note that the **BridgeApp** should be installed on the PC or server that also houses your property management client.* This <u>does not</u> have to be at the actual site itself, although that usually is the case. If your preferred management software already has a cloud integration with StorLogix Cloud, then the **BridgeApp** is unnecessary and can be removed from your PC or server. A PTI Support Technician can help with the BridgeApp installation if needed, although all the instructions to install are listed below.

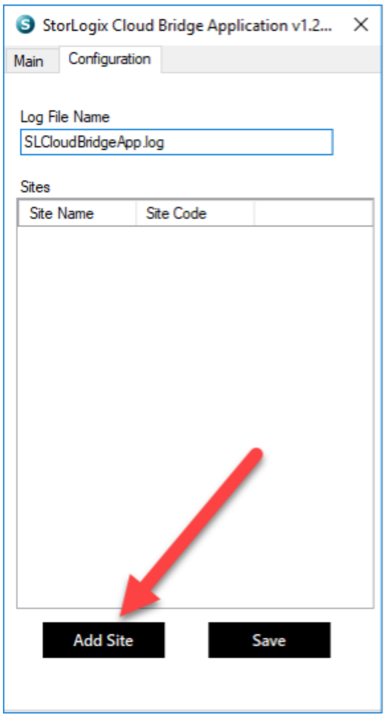
- To install the BridgeApp, click the link provided below. Then, click **Next** to complete the installation:



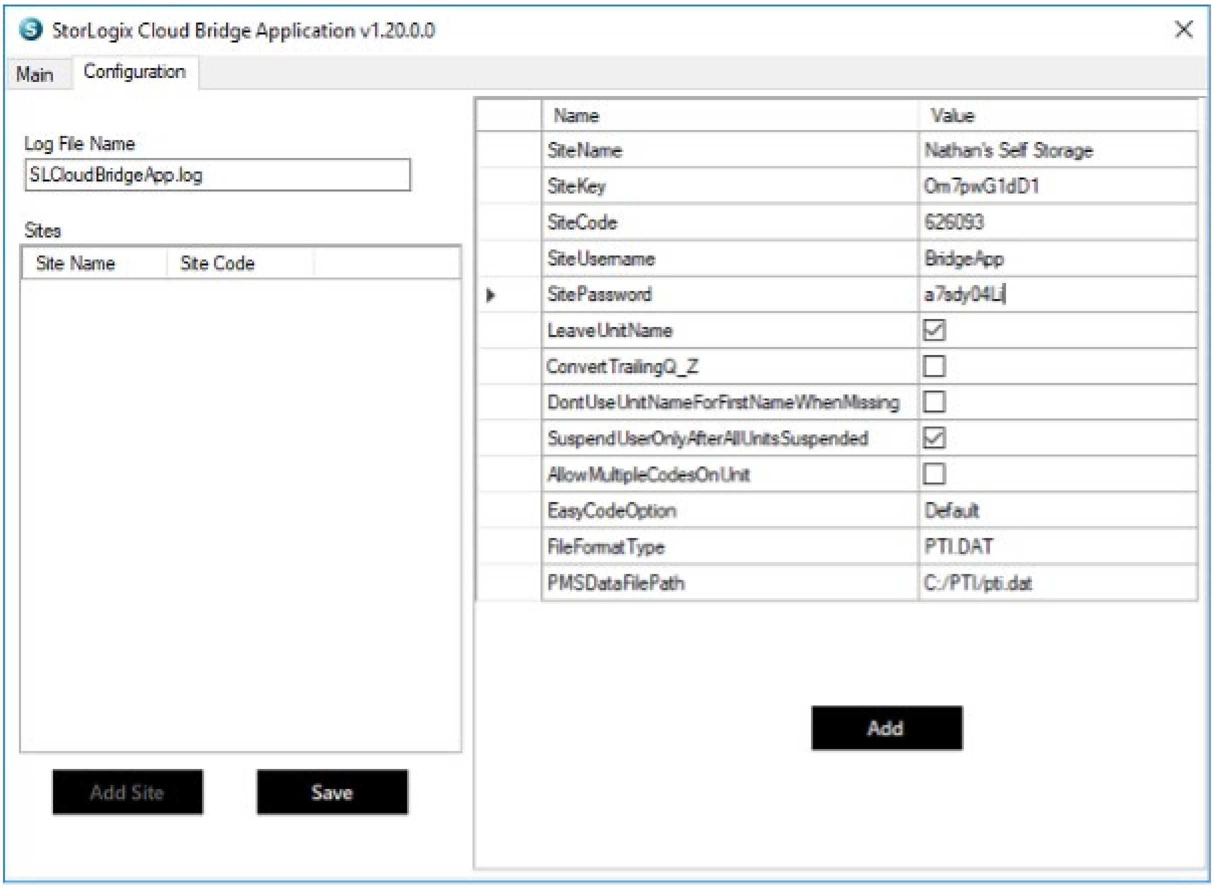
  - https://support.ptisecurity.com/files/updates/software/SLCBridgeApp/BridgeApp_Web.exe

- After the installation is complete, open the new desktop shortcut called **SLCBridgeClient**.

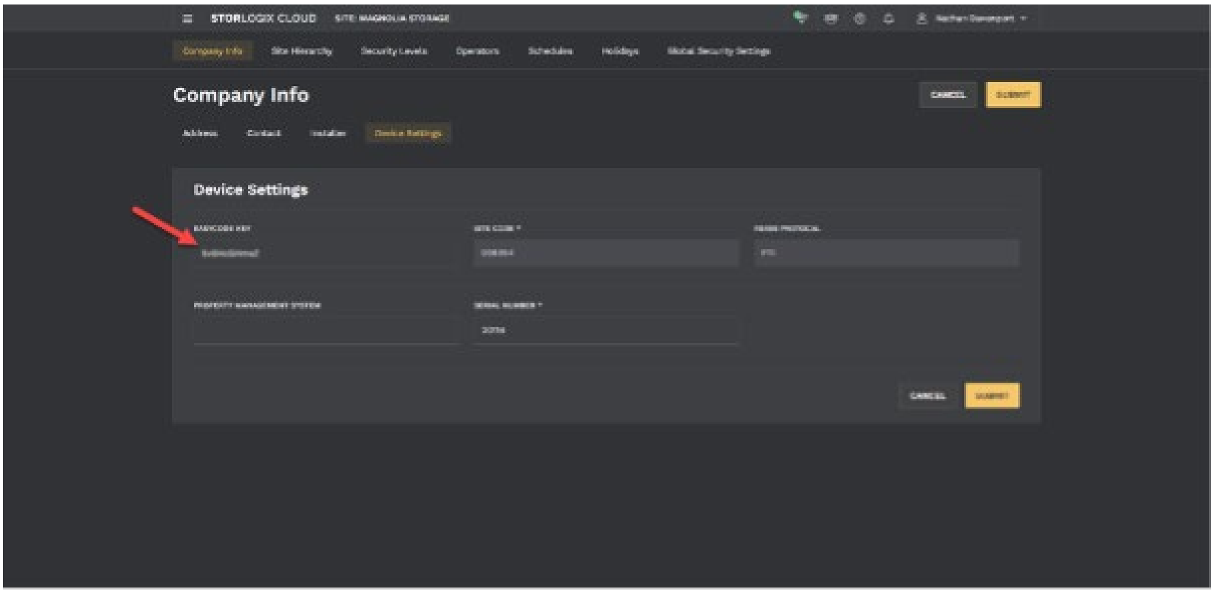
- When the Bridge App opens for the first time, you will need to configure it to your specific site. To do so, click **Add Site** as shown below.



- You should now see the configuration table appear.

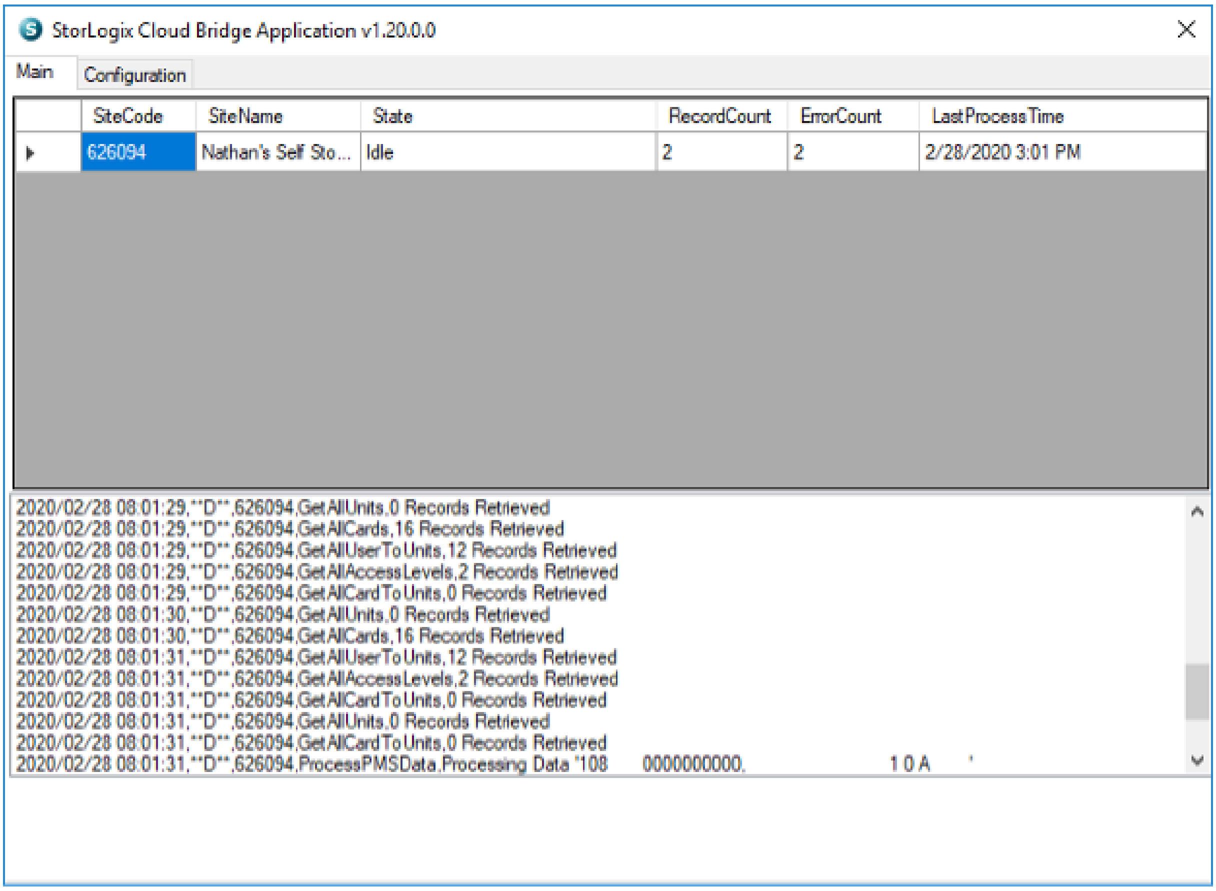


- Now, you will need to add the requested information that's listed below:
  - **SiteName** – Type in the Site Name listed in StorLogix Cloud.
  - **SiteKey** – The 10-digit alpha-numeric value is case sensitive and is located in StorLogix Cloud and can be found (in Single Site Mode) clicking **Operations** > **Company Info** > **Device Settings** > **SiteKey**.



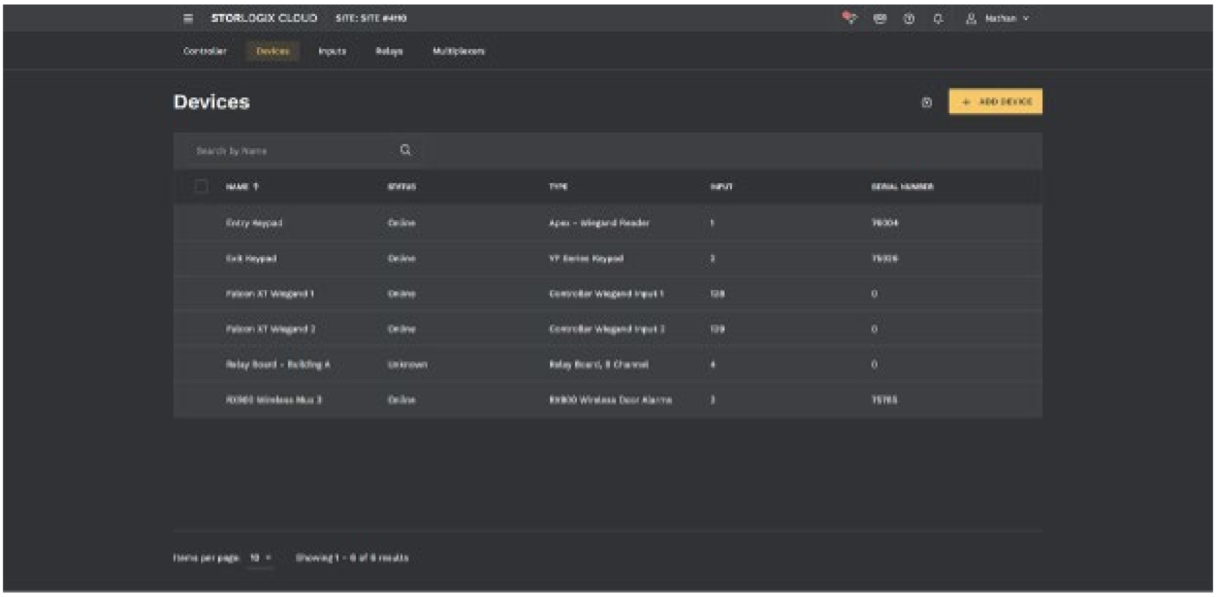
- **SiteCode** – is a 5 to 6-digit number that identifies your specific site, and can be found under **Setup** > **Falcon XT** > **SiteCode**
- **SiteUserName** – Any new Operator Name
- **SitePassword** – *******

- The 5 checkboxes in the middle of the BridgeApp configuration table refer to the unique formats different property management software companies use to list the information in the flat file.
  - Check all that apply.
- **FileFormatType** – The 2 standard file formats used in this process are **DAT** and **UPDATE.DAT**.
  - Enter the one that applies.
- **PMSDataFilePath** – Specify the location of the flat file.
- Click **Add** and then **Save** to complete the configuration.
- Now select the **Main** tab to view the status of the BridgeApp.

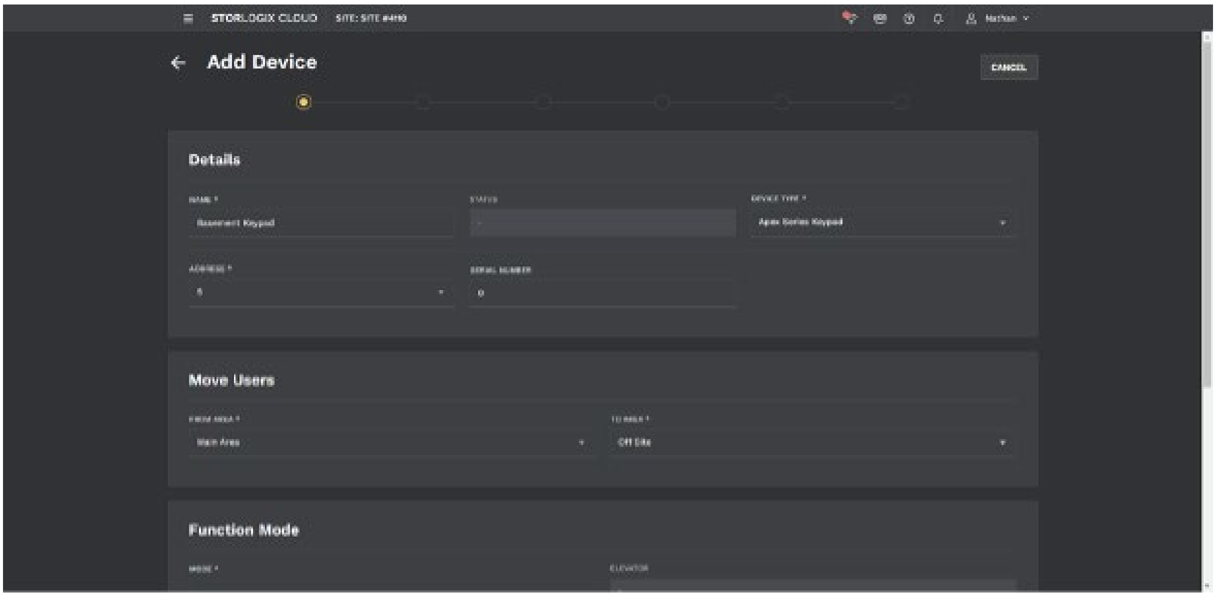


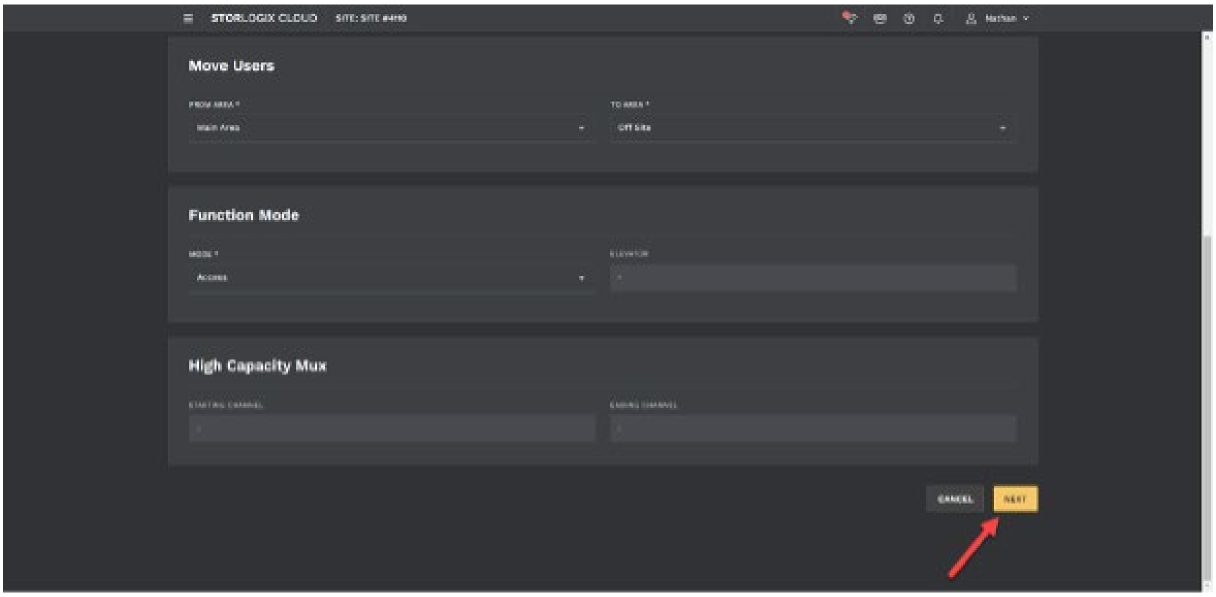
- It's important to note that the user <u>can</u> **Exit** the Bridge App, and the service will continue to run in the background.

- The next step in configuration is to setup **Devices** which include **Access Points**, and other peripherals.
  - Click **Setup** > **Devices**.

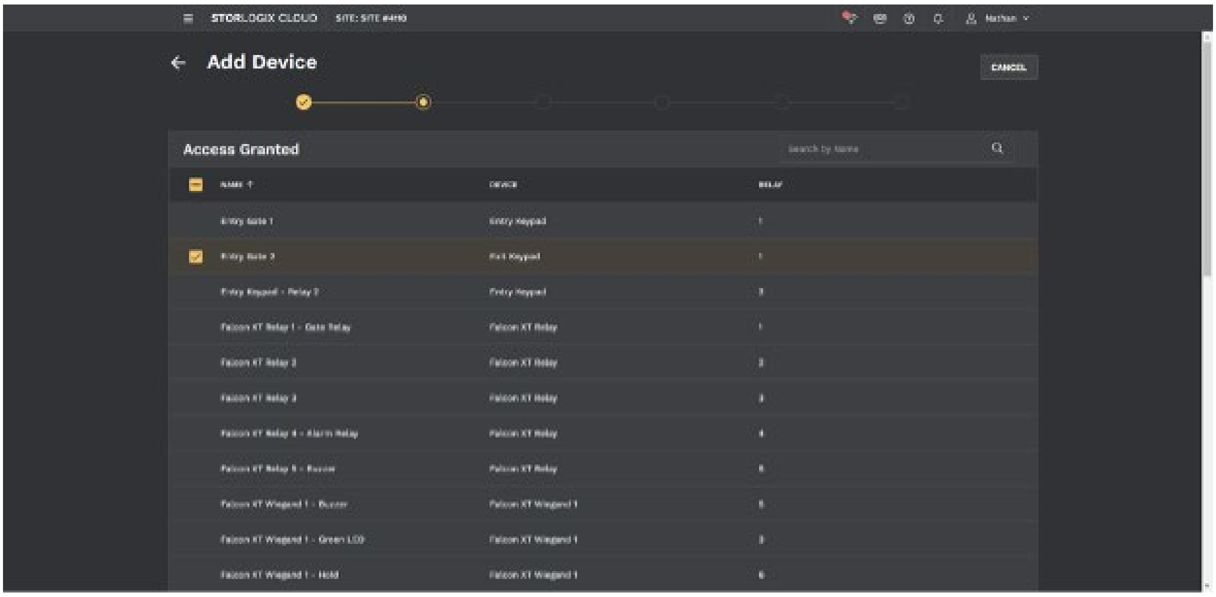


- Click a row to edit a **Device** or select **Add Device** if you need to set one up from scratch.
    - <u>If you have connected all the hardware, you will likely see the **Devices** self-discovered in the table.</u>
- Fill out the required fields indicated by * then click **Next**.

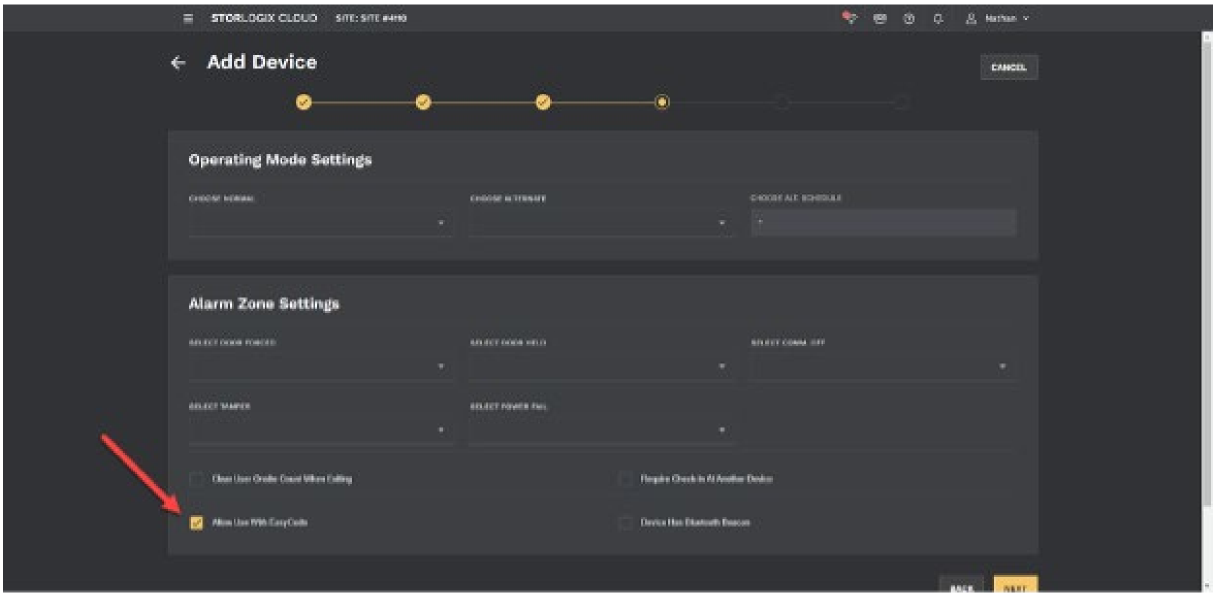




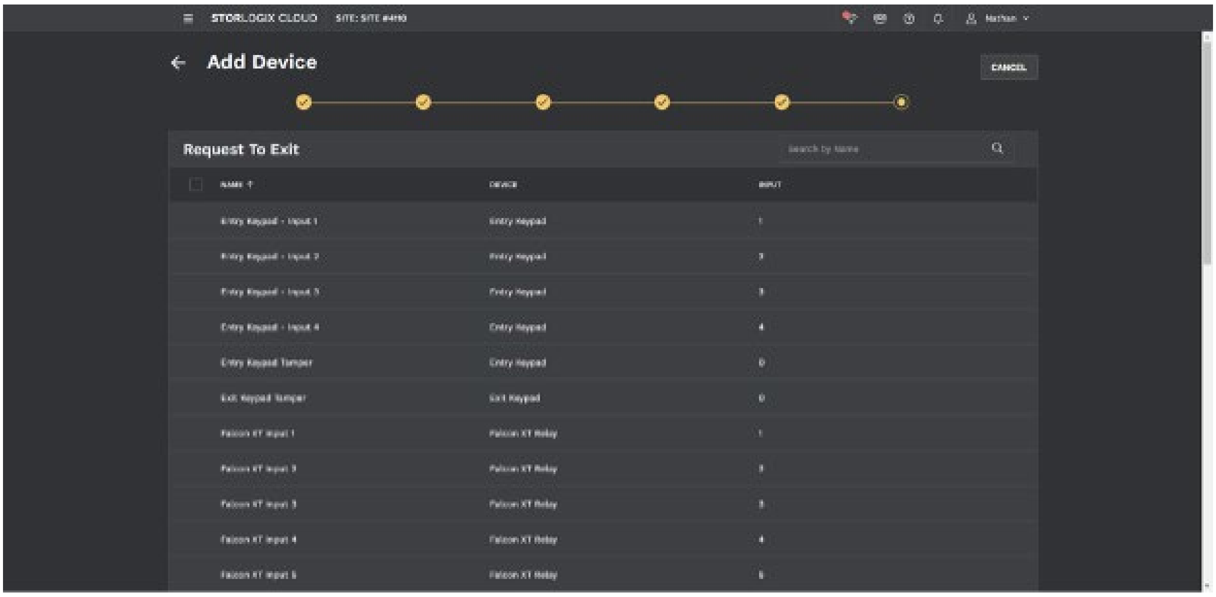
- Now, select the relay to fire for a **Granted Access** Then repeat the action for a **Denied Access** event (This is OPTIONAL).



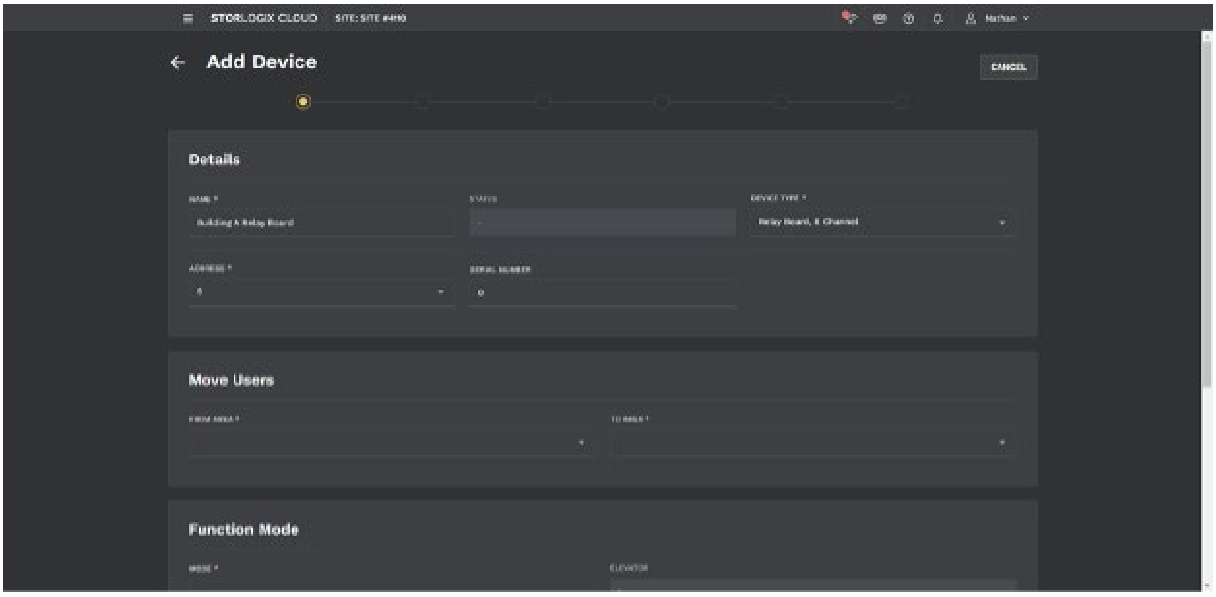
- Next, are 2 optional sections that include **Operating Mode Settings**, **Alarm Zone Settings**, and **Extended Door Controls**.
    - NOTE: If you intend to make an **Access Point** (keypad or reader) authorized to use EasyCode, make sure the **Allow Use With EasyCode** is checked before submitting.



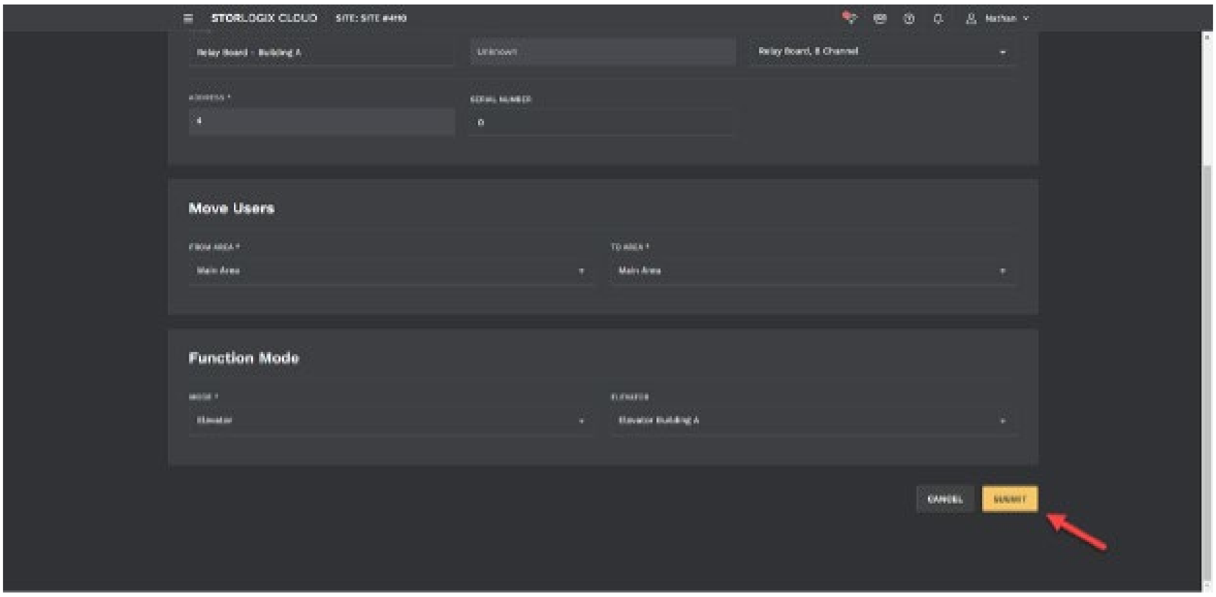
- Finally, select an input for a **Request To Exit** button if it applies (This step is OPTIONAL). Then hit **Submit**.



- If you intend on controlling access to floors with PTI's Relay Board / Elevator Controls, then perform the following steps. If this is NOT the case, then skip to ***Step 11***
    - Click **Setup** > **Devices** > **Add Device** or click the row if you see the specific **Access Point** already in the list.
    - Fill out the required fields including to be sure to select the **Access Point** from the device type list that will be controlling the elevator.

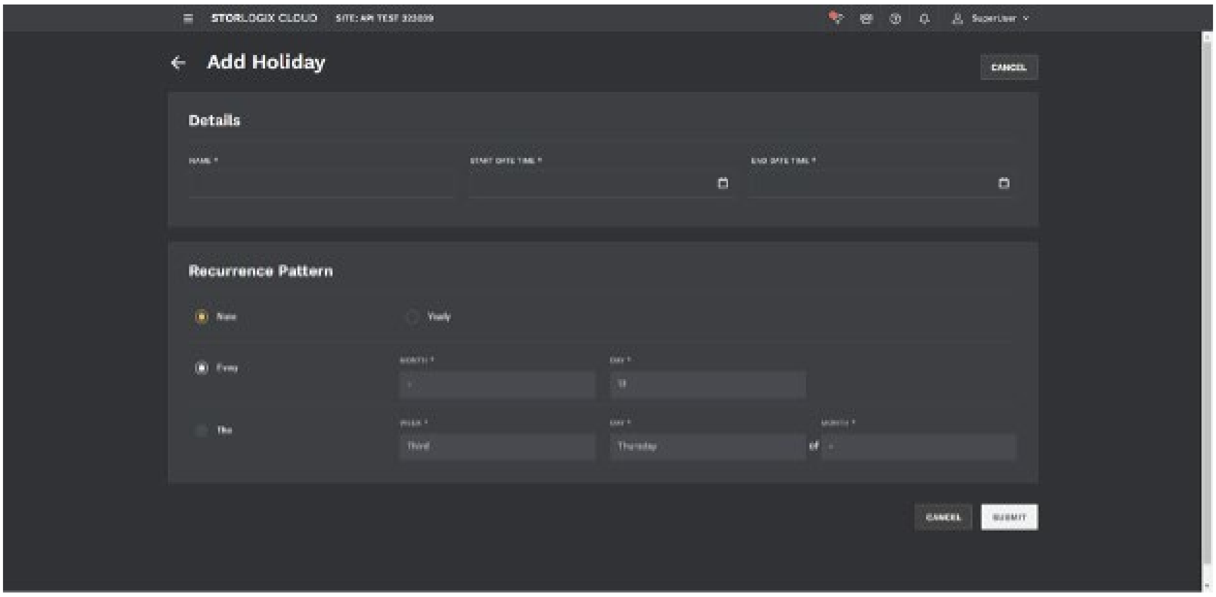


- Under **Function Mode**, select **Elevator** and then the building that will house the elevator. Then click **Submit** or **Next**.

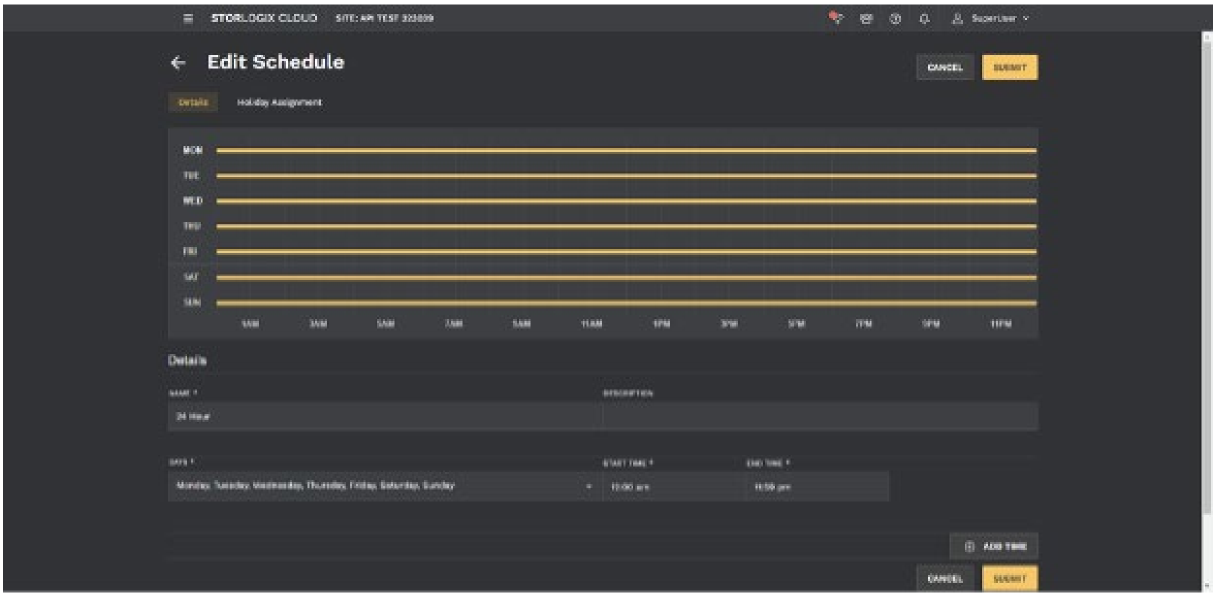


- Go all the way to the last required step and finally, click **Submit**.

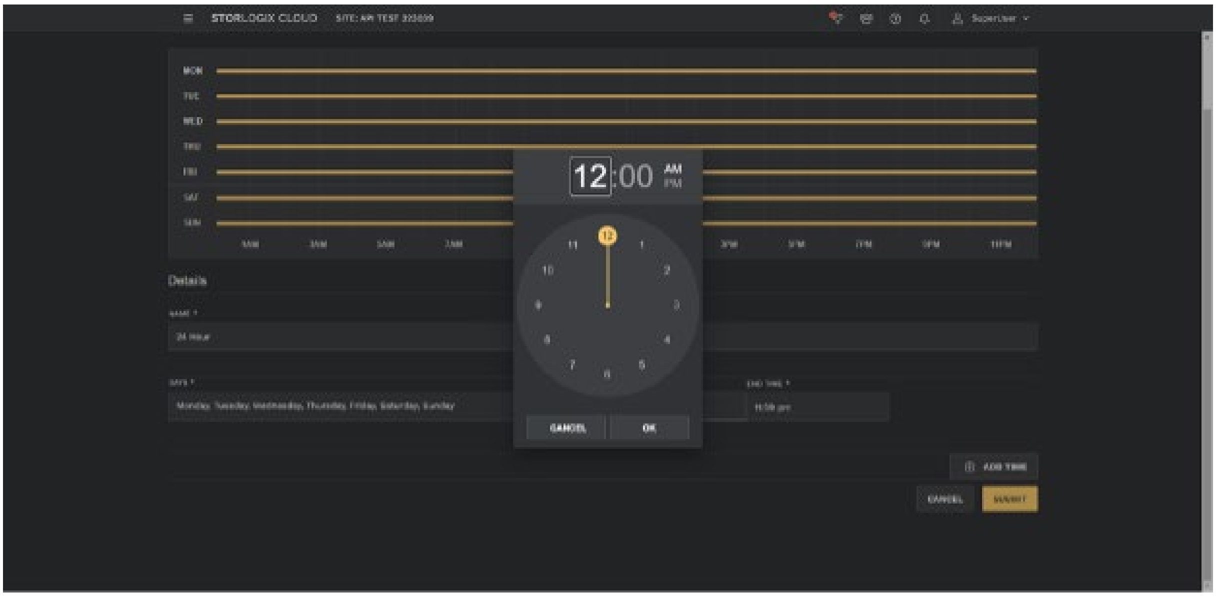
- Next add **Holidays** found in **Operations** > **Holidays** > **Add Holiday**. This is an OPTIONAL step.
  - Click **Submit** once complete or skip altogether.



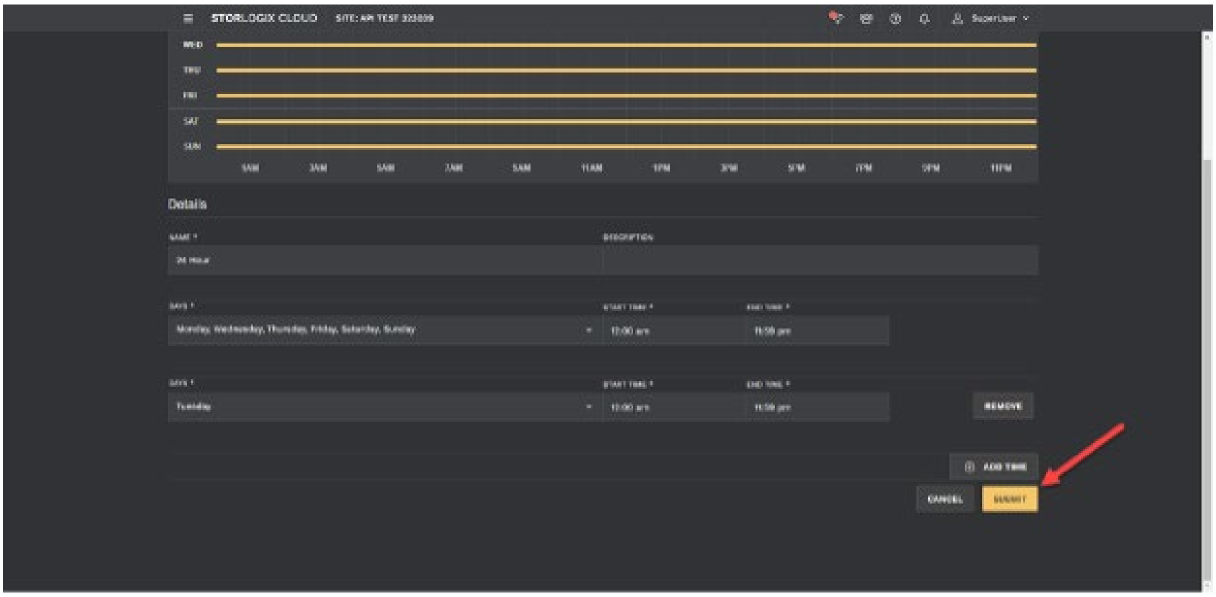
- After filling out the **Holidays** go to **Schedules** and create at least one **Schedule** before moving to the next section.
  - Click **Operations** > **Schedules** > **Add Schedule**
  - Two **Schedules** will already exist (**24 Hours** and **Access Hours**), and you can edit them by clicking on the **Schedule**
  - You will see a configuration window appear. Here you can adjust the name, hour of the day, and day of the week to meet the needs of your specific operation. Click **Edit** to make changes.



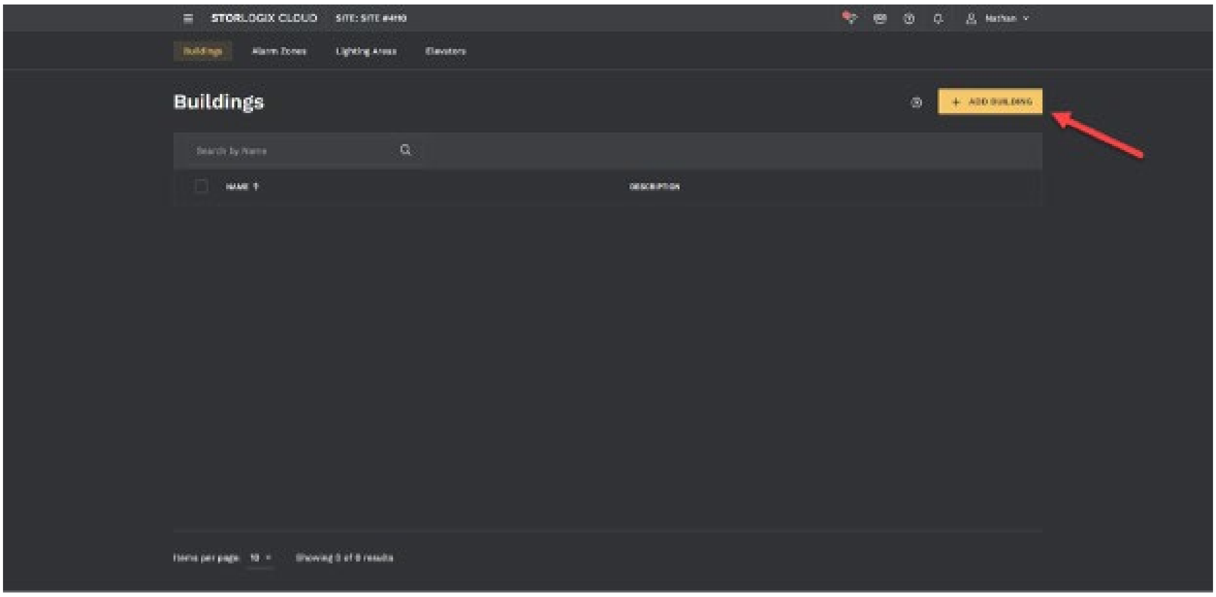
- Use the dropdowns to adjust the days of the week. Click the **Start Time** and **End Time** fields to drag the hour hand on the clock to the intended times.



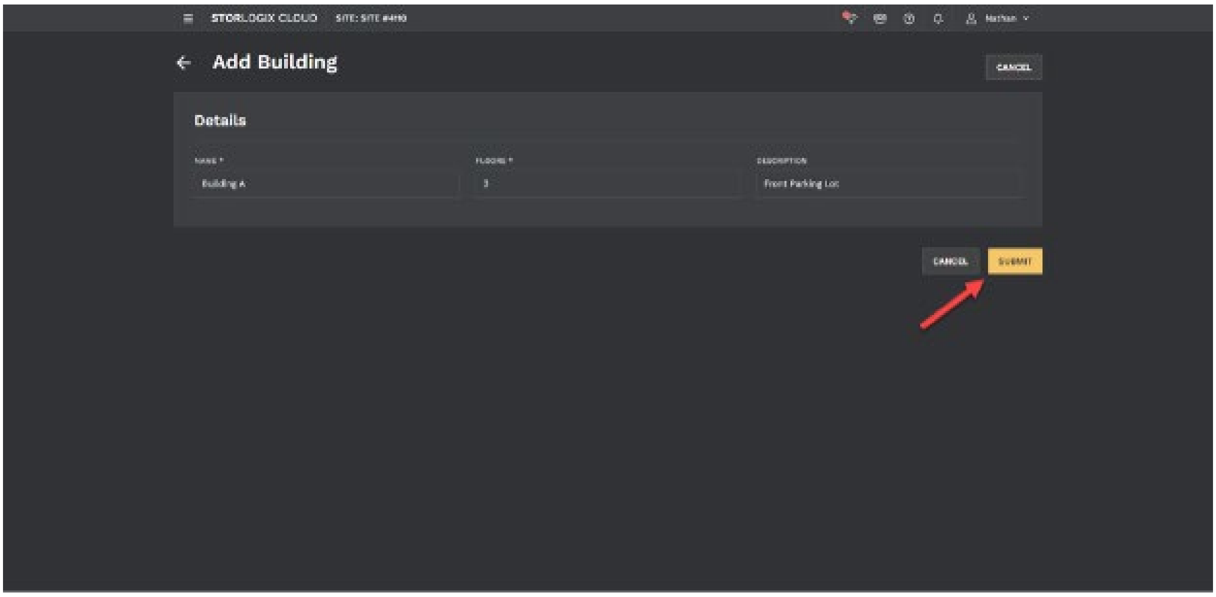
- Finally, to add another unique time to the Schedule, click the **Add Time** Hit **Submit** to save the Schedule.



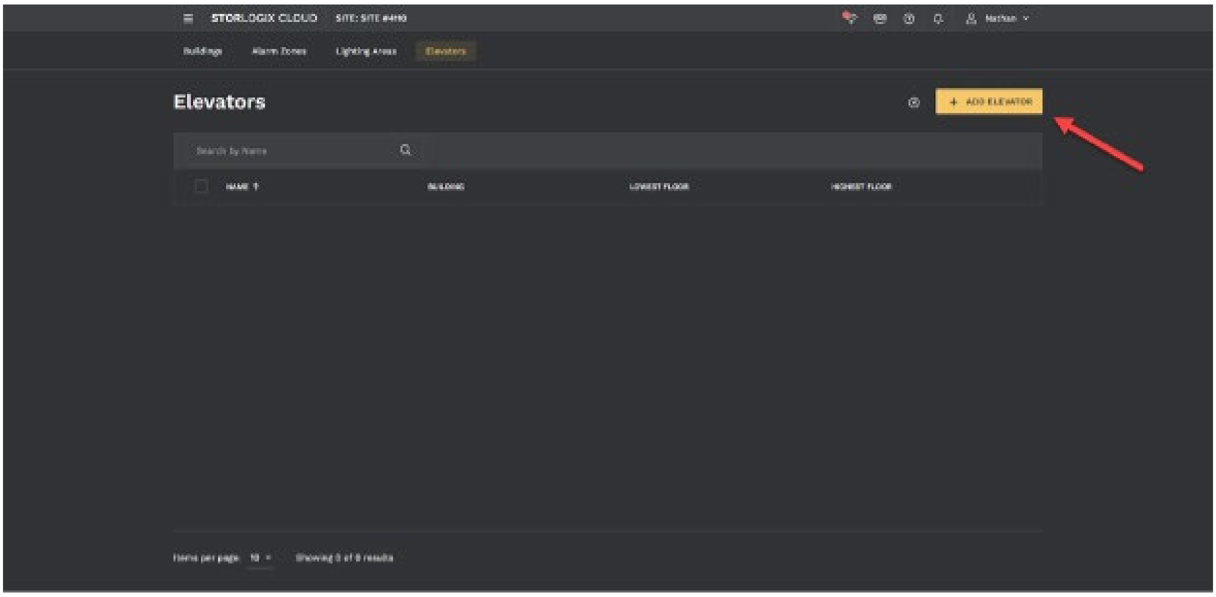
- Next go to **Facilities** > **Buildings** > **Add Buildings** and set up the buildings that will be on the property. If you are using a Relay Board / Elevator Controls to control access to different floors, then this step is required. Otherwise, you can skip this step.



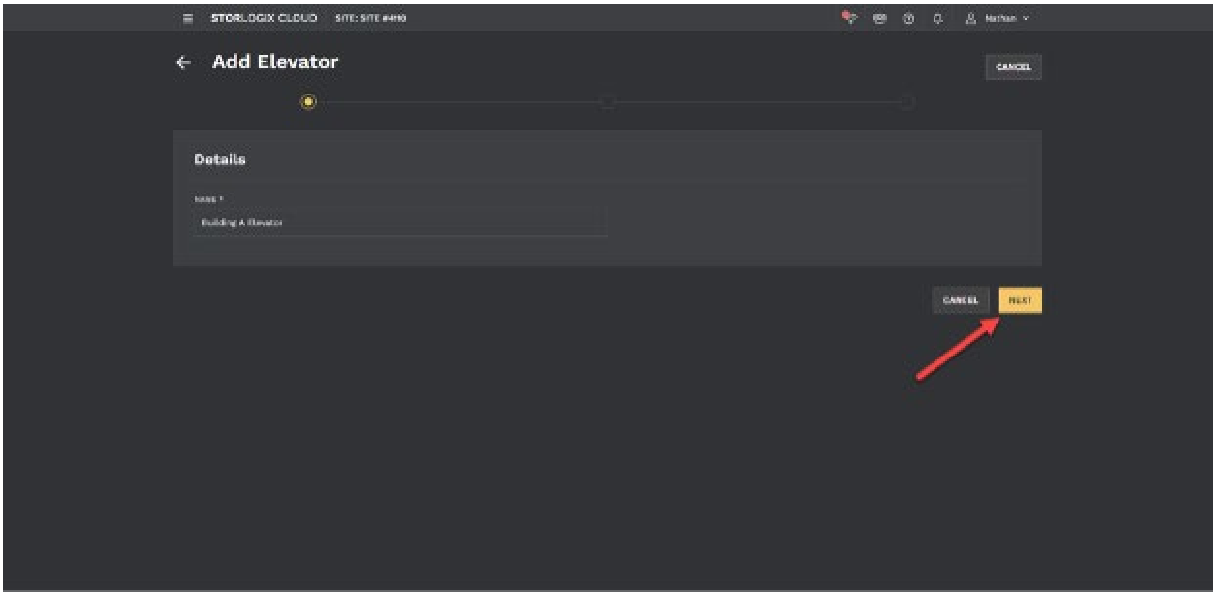
- Fill out the required fields, **Name** and **Floors** (see screenshot), and then click **Submit**.



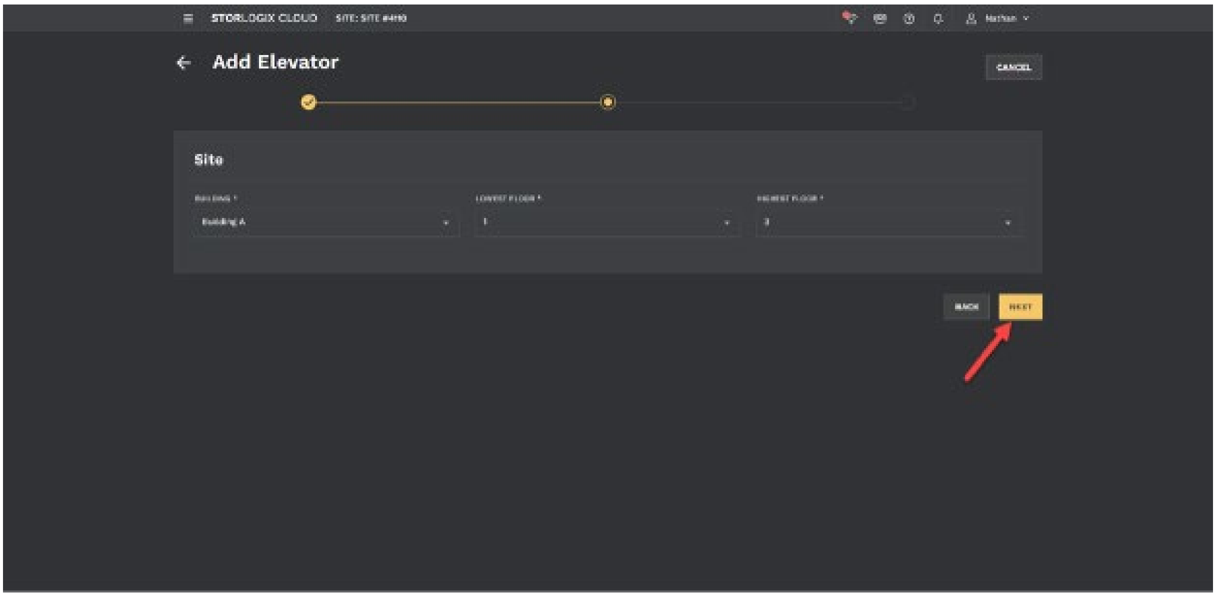
- Now it is time to configure the Elevators. Again, this is only for sites that will use Elevator Controls.
    - Click **Facilities** > **Elevators** > **Add Elevator**.



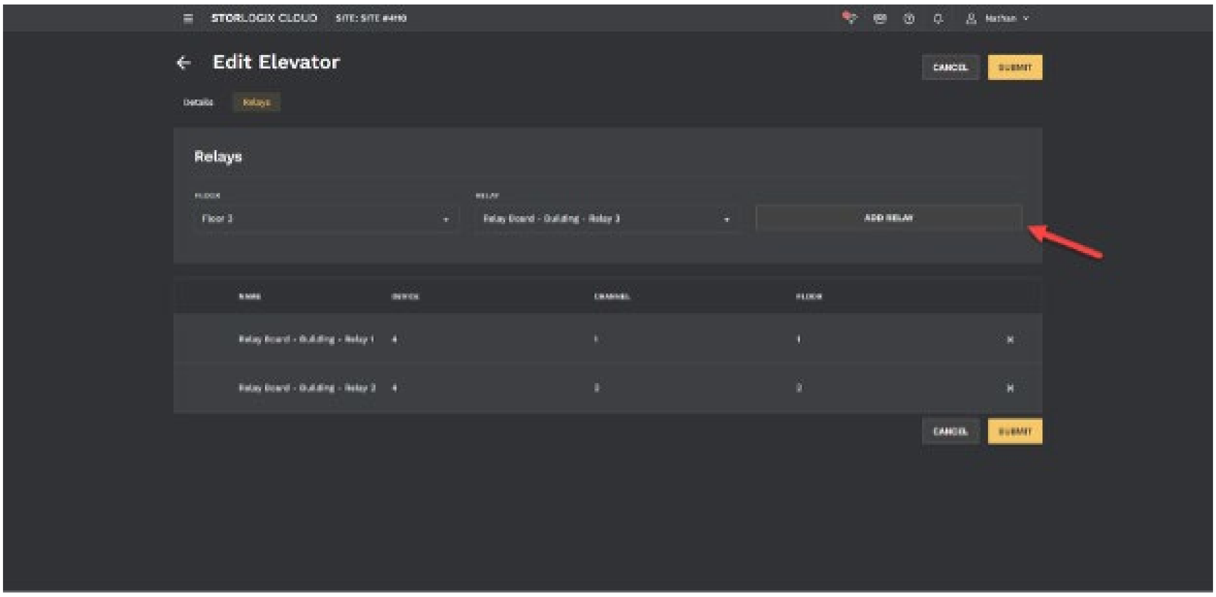
- Provide the **Elevator** a **Name** then click **Next**.



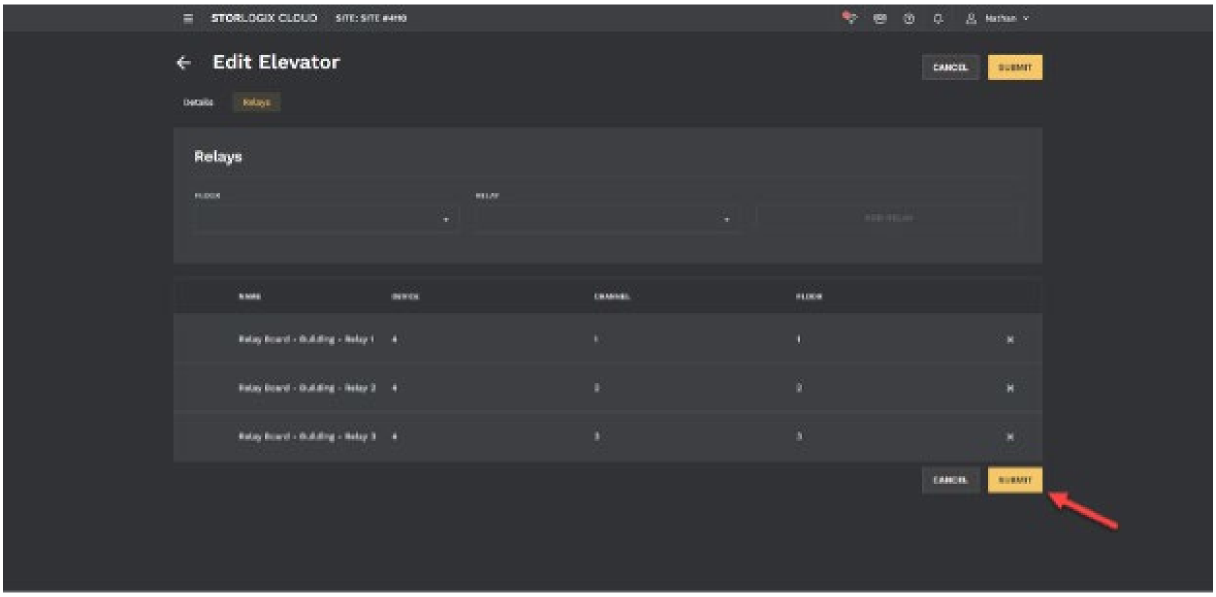
- Select the **Building** from the drop down. Then set the lowest floor (in this case **1**), and the highest floor (in this case **3**). NOTE: the lowest and highest floor should detail the lowest and highest floors you plan to use the for Elevator Controls. Then click **Next**.



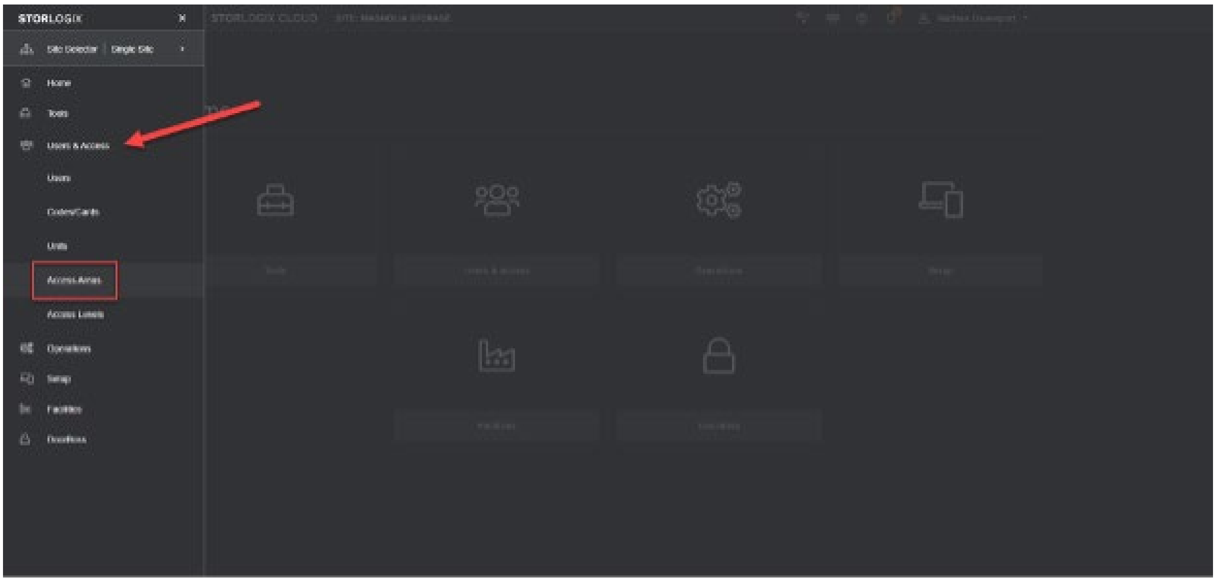
- Next, select the relays that will control each floor.
  - First select the **Floor** from the list. Then the **Relay**.
    - After the assignment is correct, then click **Add Relay**



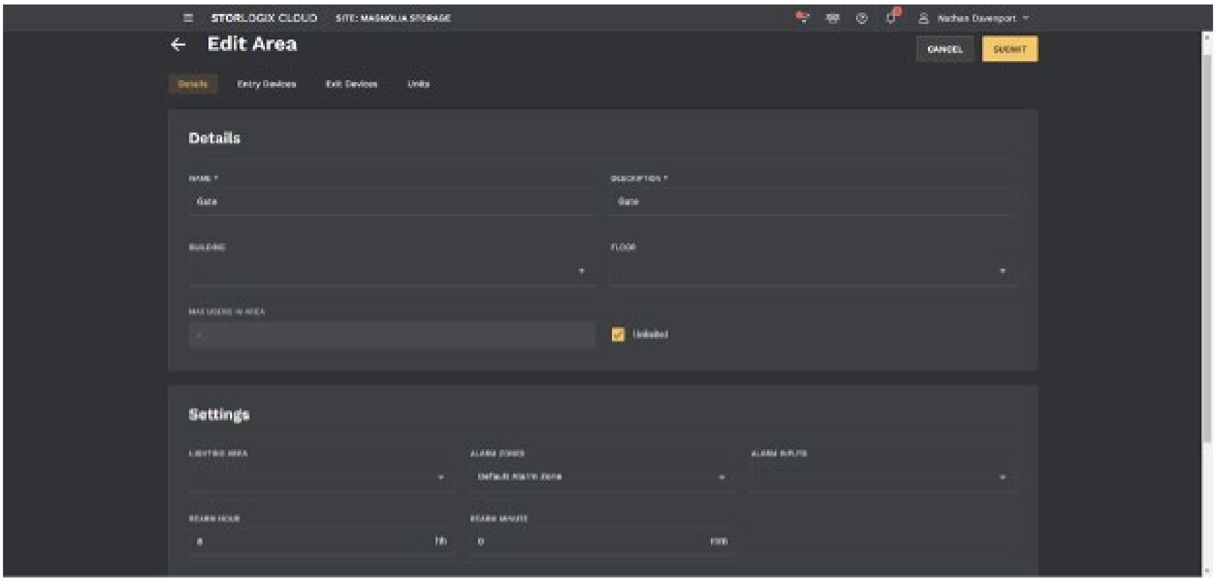
- After matching all floors to the needed relays, click **Submit**.



- Next you will need to setup **Access Areas**.
    - Click **Users & Access** > **Access Areas** > **Add Area** (or edit an existing).

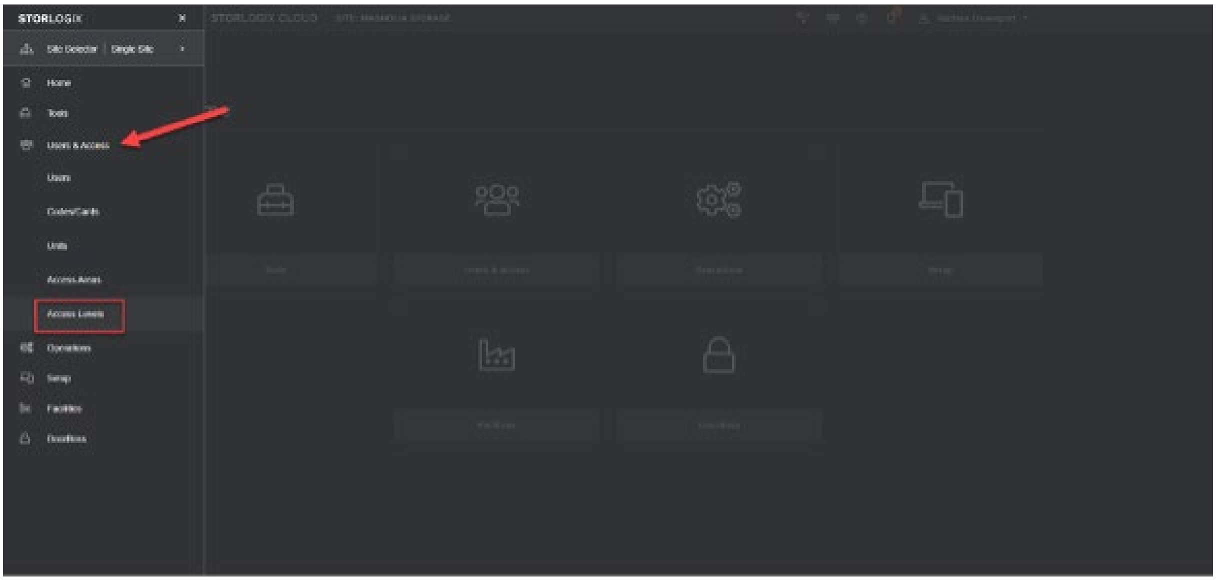


- To edit an **Access Area,** click on the row.
- The **Edit Area** window will appear and will be organized into four tabs named **Details**, **Entry Devices**, **Exit Devices**, and **Units**.

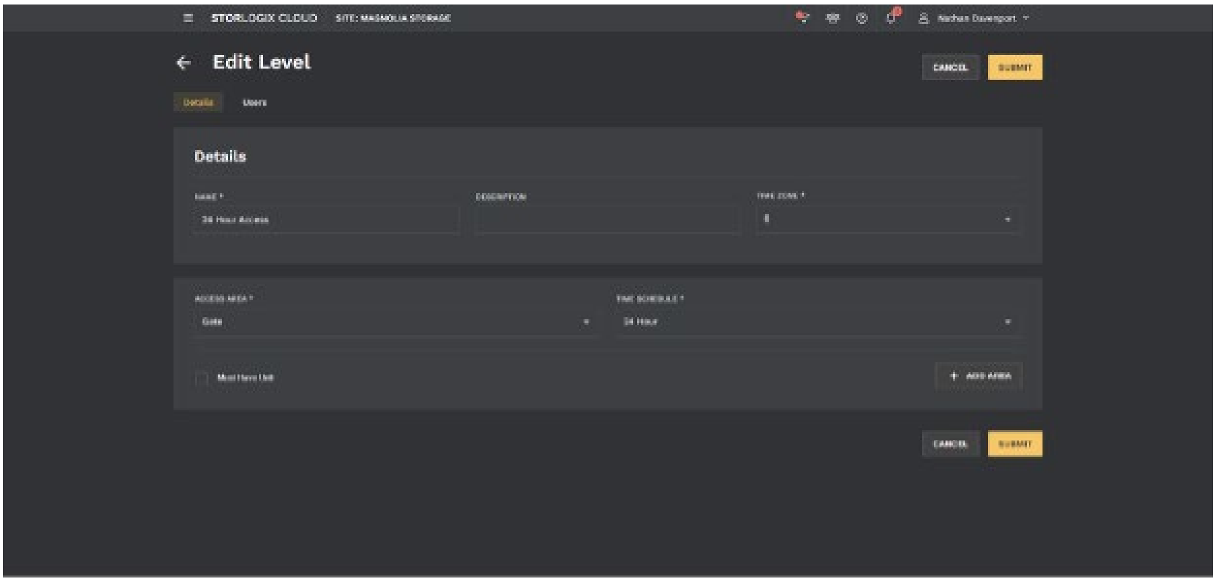


- In the Details tab, you can edit the name and provide a description.
- Additionally, if this Access Area is inside a specific Building, select the Building.
- If the Access Area is on a specific floor of a building, select the Floor.
- If the Access Area has a lighting area within it, select the Lighting Area from the list.
    - Lighting Areas must already be set up if you are using this function.
- The **Maximum # of Users** in Area can be set to control how many users can be in an area simultaneously. This is a high security function and will usually be set to Unlimited – 0.
- You can type any number limit in the field that you desire.
- Add **Entry Devices**, **Exit Devices**, and **Units**. Then press

- Next complete the setup of **Access Levels**.
    - **Access Levels** is a combination of **Access Areas** and **Schedules**.
    - To view **Access Levels**:
        - Select **Users & Access** > **Access Level**.



- You can edit an Access Level back clicking the row.
    - The **Edit Level** configuration window will appear.



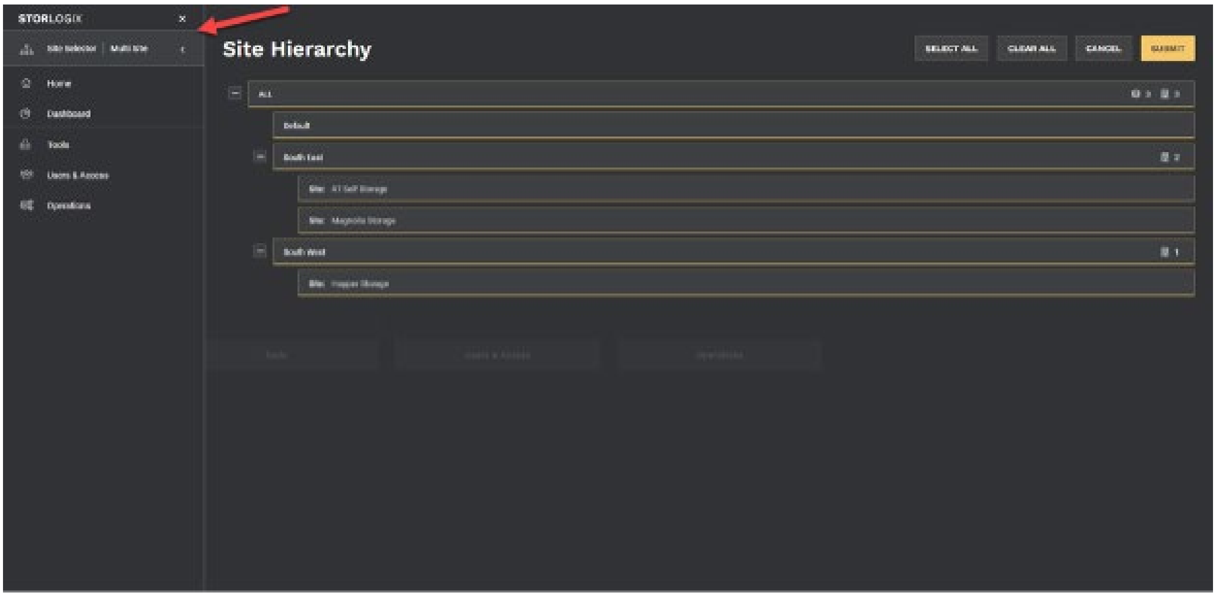
- Under the **Details** tab you can provide a name and associate the Access Level with the appropriate interface Time Zone.
    - The Interface Time Zone is a number assigned in the property management software representing a set of hours. This transfers to StorLogix Cloud as the Access Level you want the User to contain. Select a time zone number as you rent a unit to the customer.
    - Next, select the Access Area and Schedule you want to combine to create this Access Level.
        - You can even add more than one of each if necessary.
        - Click **Submit**.

Multi-Site Hierarchy:

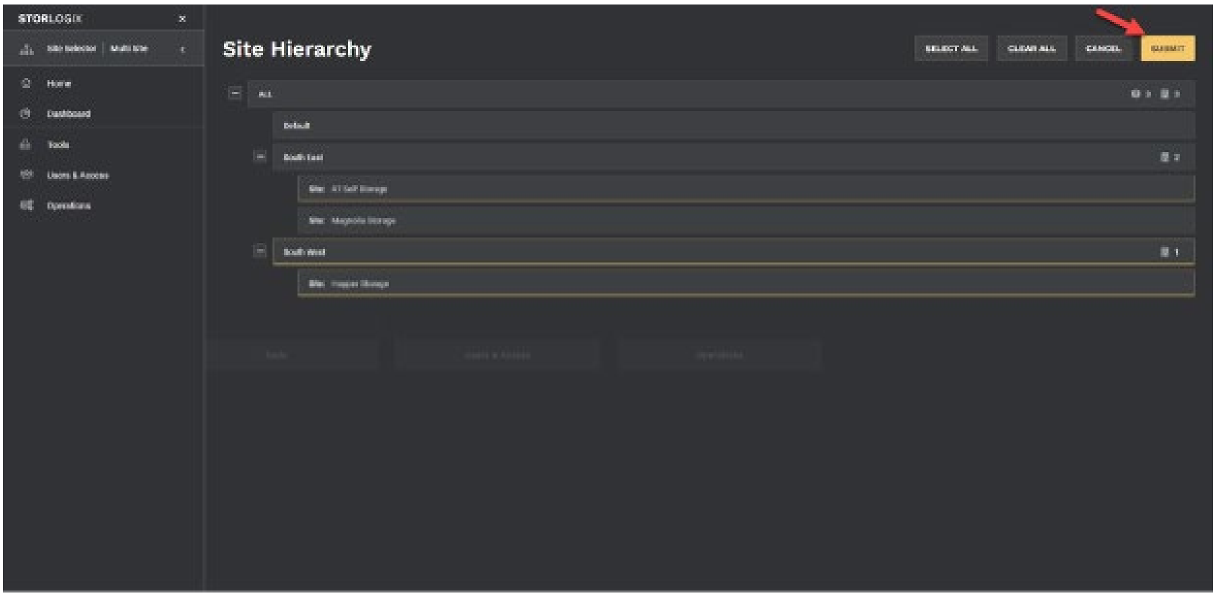
In the latest version of StorLogix Cloud, Operators select the site level they wish to view access control data. After logging in, Operators land on the Home page at the top level of their hierarchy permission. For example, a district manager may only have software access to their district. Therefore, when they log in, any page they travel to will only include their district's data and nothing else.

To select a site view, click on the Navigation menu in the top left corner:

- Click the **Site Selector**:



- Once the Multi-Site Hierarchy is displayed, the Operator will be able to select or unselect a single site or multiple sites with a single click. Yellow highlighted sites indicate the site selection. To commit a selection, click **Submit**.



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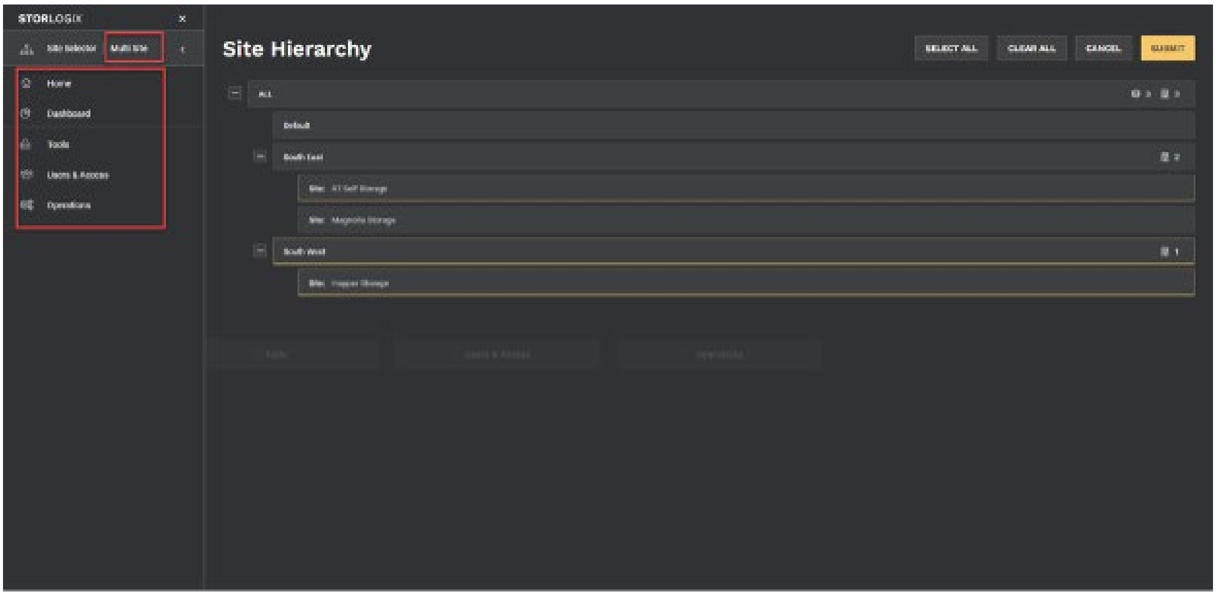
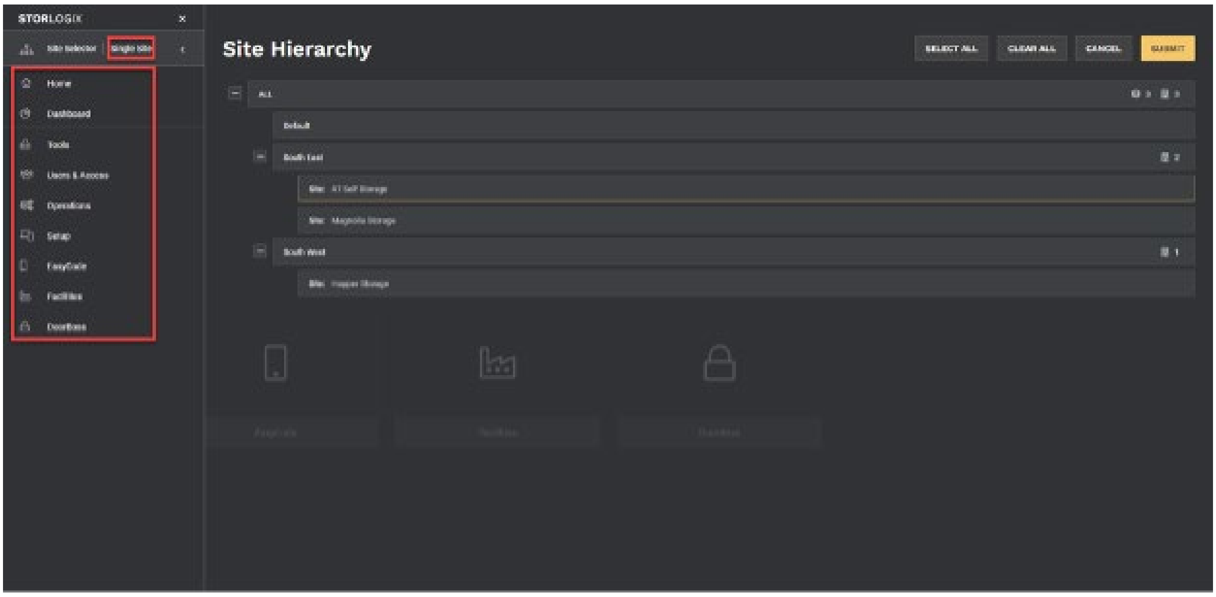
Multi-Site



Single-Site



The single-site view allows for selecting sections like Setup, EasyCode, Facilities, and DoorBoss. It is risky to allow these sections to be selectable when viewing multiple sites' worth of data at a time. For example, to gain access to the Setup section, select a single site first.

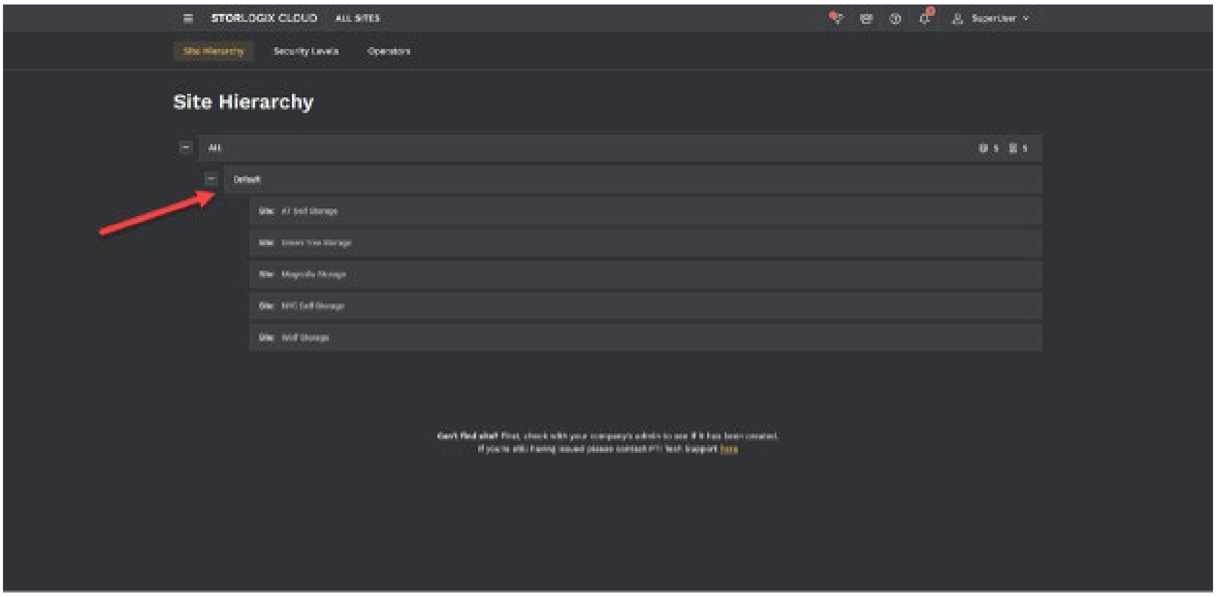
Site Hierarchy:

This feature allows organizations to arrange their sites within the software by region, district, or area. An account administrator (Super User) can manage the visibility and permissions of other employees throughout the organization. For example, the Super User will be able to set up districts or regions and then isolate district or regional managers in StorLogix Cloud to only view the sites they oversee. This essential enterprise feature will provide heightened security for large and midsized operators alike.

To set up your organizational structure:

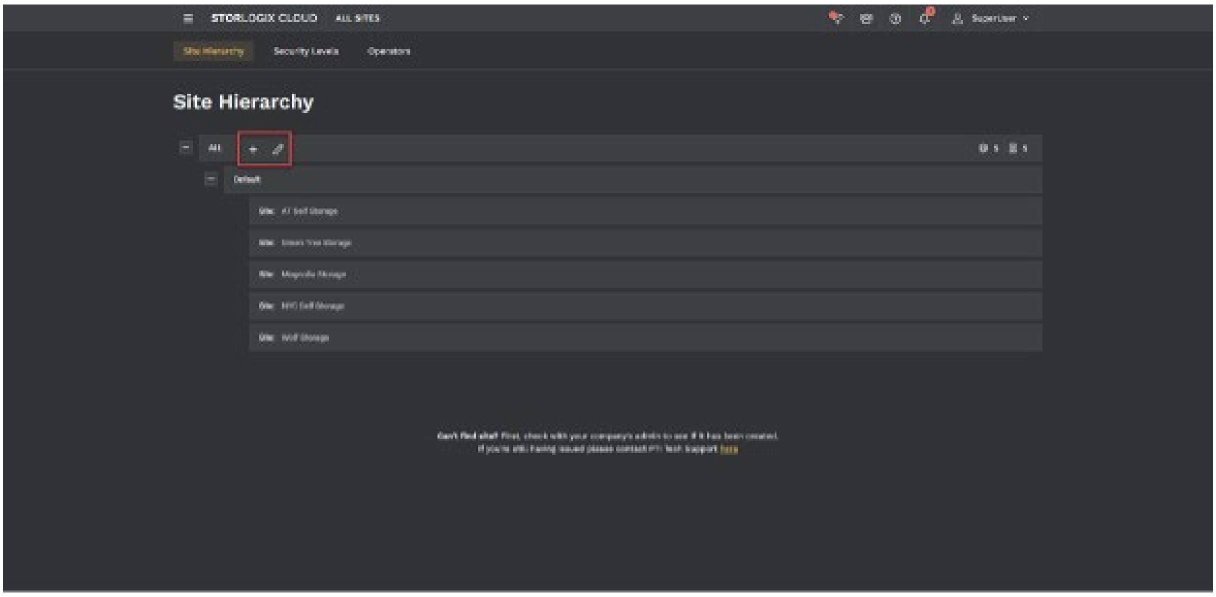
- Sign in as an Operator with permission to edit the Site Hierarchy. Click on **Operations**, then **Site Hierarchy**.

- After cloud installation, you will notice all your sites listed on the left-hand side of the page under the **Default** node.

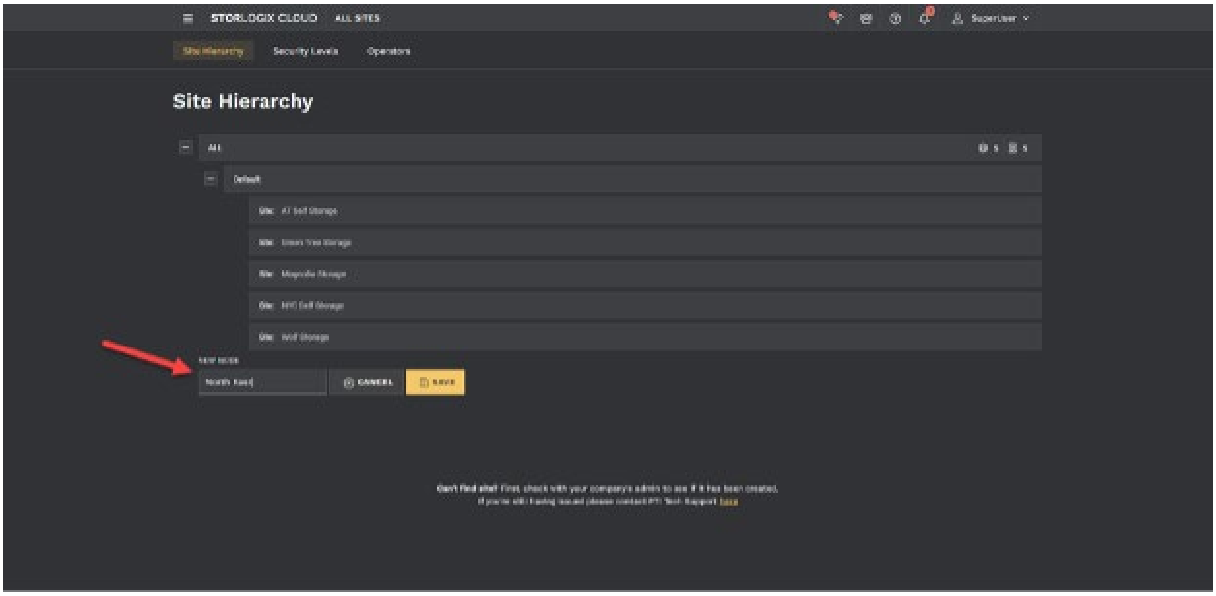


- To quickly manage your organization, we recommend creating Districts or Regions to place each of your sites. You will need to create a new node in the hierarchy to do this.
    - Place your cursor over the top node called **All**. You will notice the **Cross** and **Edit** symbols will appear. Click the cross symbol

- Add Symbol +
- Edit Symbol



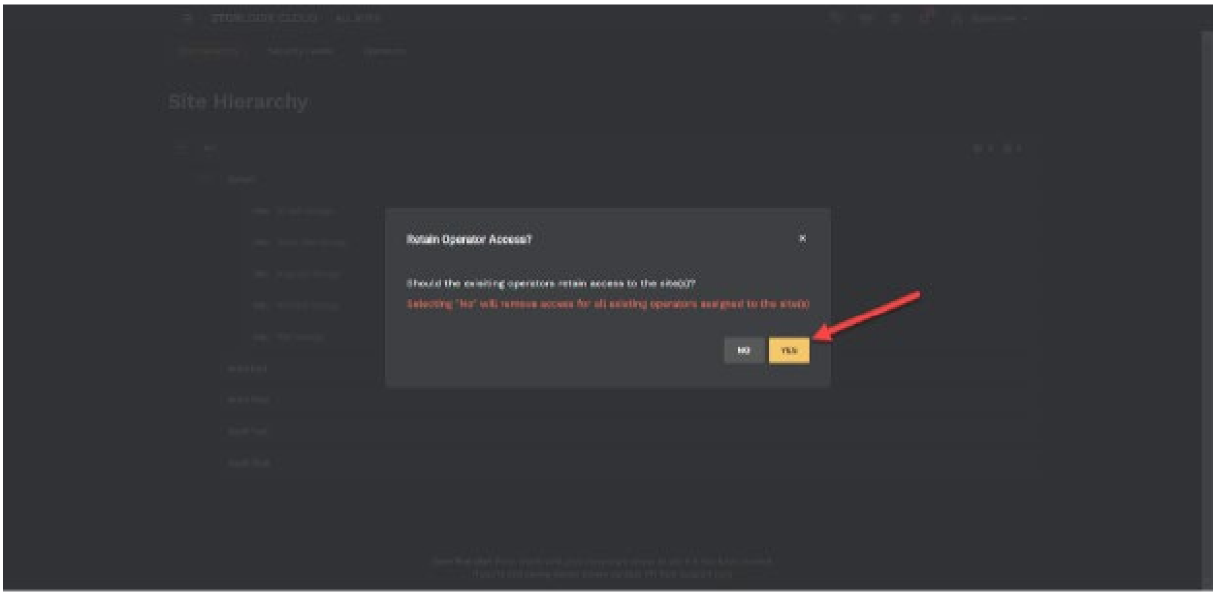
- The new node will now appear at the bottom of your list of sites.
- Give your District / Region a name that matches your organizational structure and click **Save**.



- You'll now see your newly created level in your hierarchy listed.
- Repeat this process for each one of your Districts / Regions.

- If you need to subdivide each District, you can hover over the new node with your cursor and select the **Cross** symbol again.
    - After clicking **Save,** you'll now have another level within the hierarchy.

- Now that your Districts / Regions are created, you can drag each site from the **Default** node into its proper place within the newly created hierarchy.
    - To do this, click and hold the name of the site, drag it to the District / Region it belongs with, and let go <u>ON TOP OF THE NAME</u>.
    - The following message will appear.



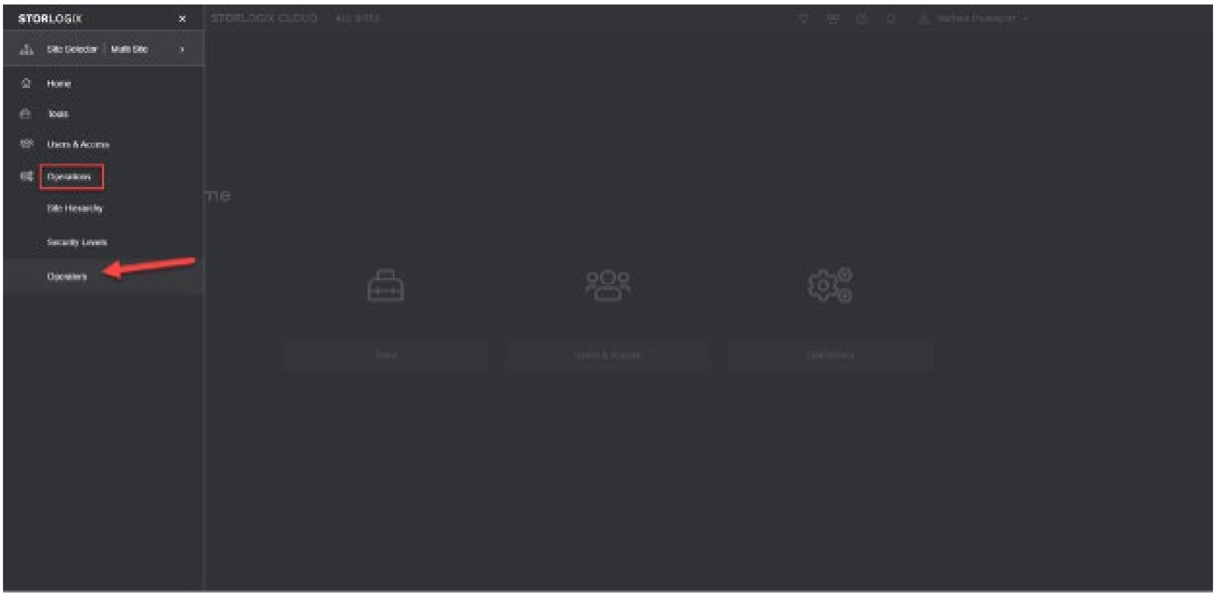
- The popup message is a safeguard to ensure you want to keep the Operators assigned to that site or start from scratch.
    - Most of the time, you will want to keep the Operators, and in that case, click **Yes.**
- Select each of your sites one by one and repeat this process until your organizational structure is complete.

Operators:

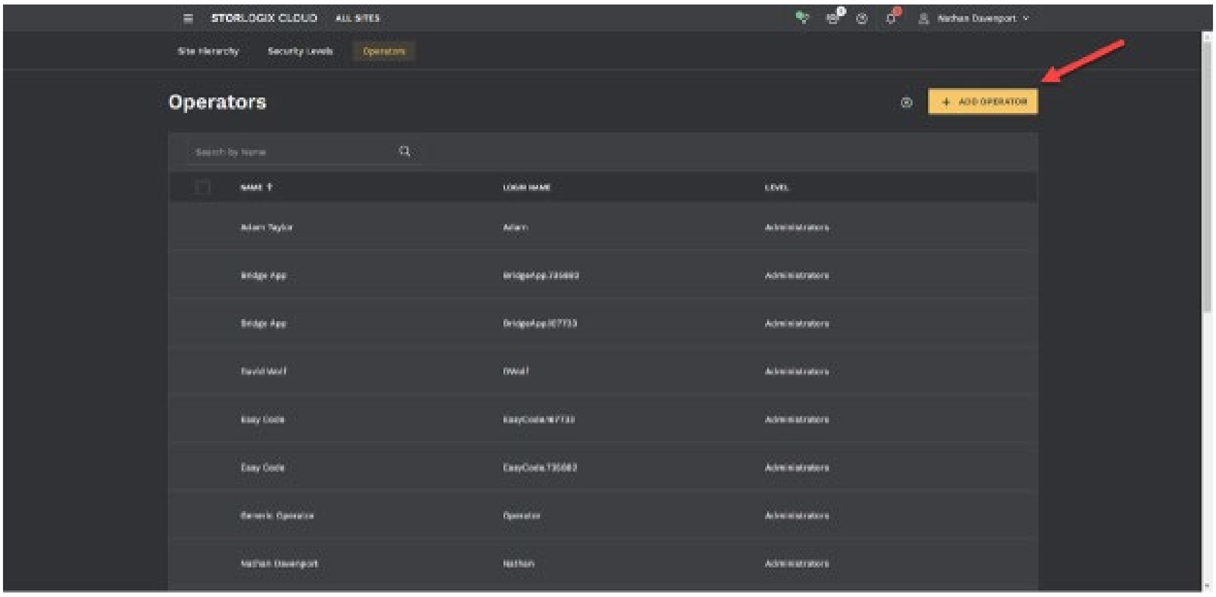
Operators are software users that have permission to access at least one site in StorLogix Cloud. Their permissions can range from a Super User who has unlimited control of every site in a portfolio to an Assistant Manager who may only have limited access and control of one site. Administrators can assign granular access and control to each Operator, which provides an organization incredible flexibility and security.

To create a new Operator:

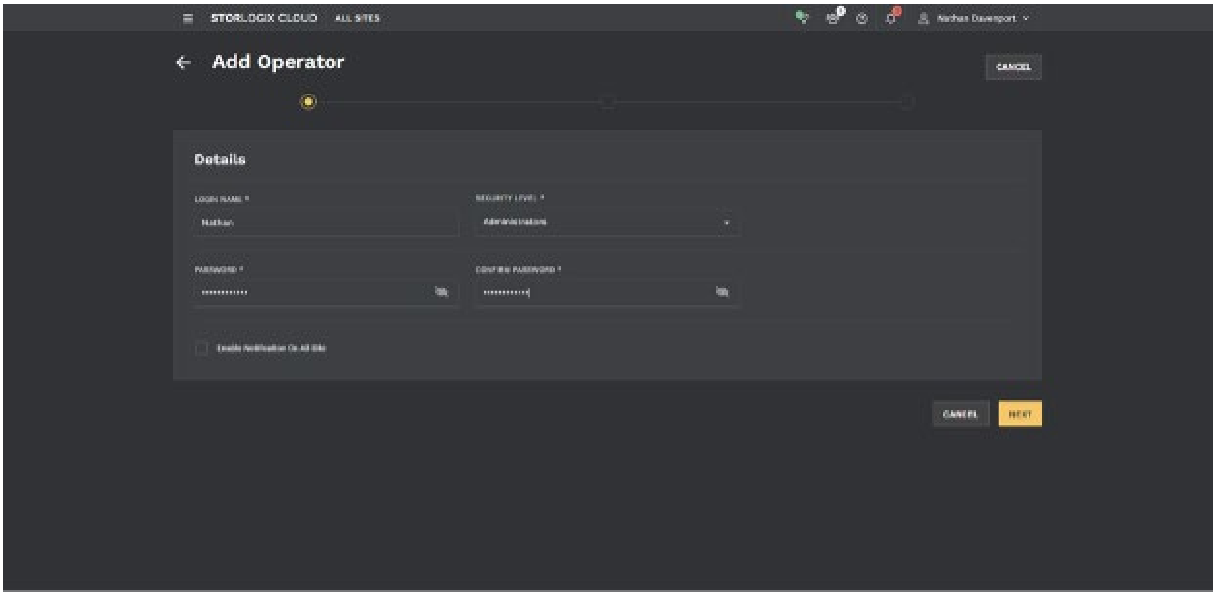
- After logging in, select **Operations** > **Operators**.



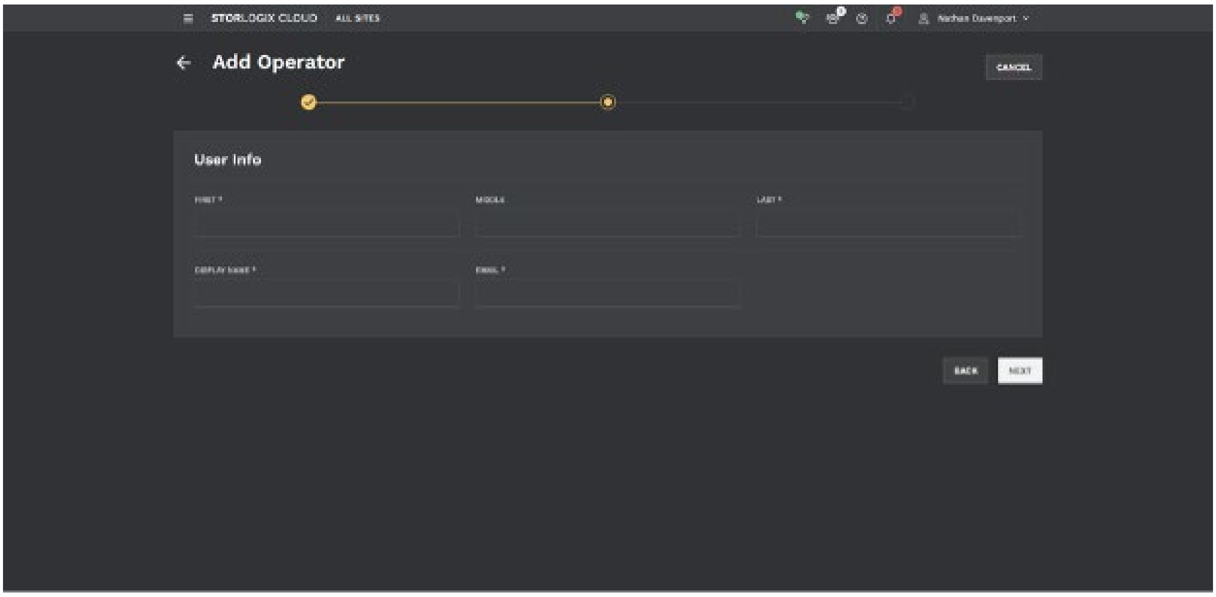
- Then, click **Add Operator**.



- Add the new Operator's **Login Name**, **Security Level**, and **Password**. If the Operator is interested in receiving Browser Notifications for onsite activity, then be sure to click the **Enable Notifications On All Sites** checkbox in the bottom left. Next, hit **Next**.

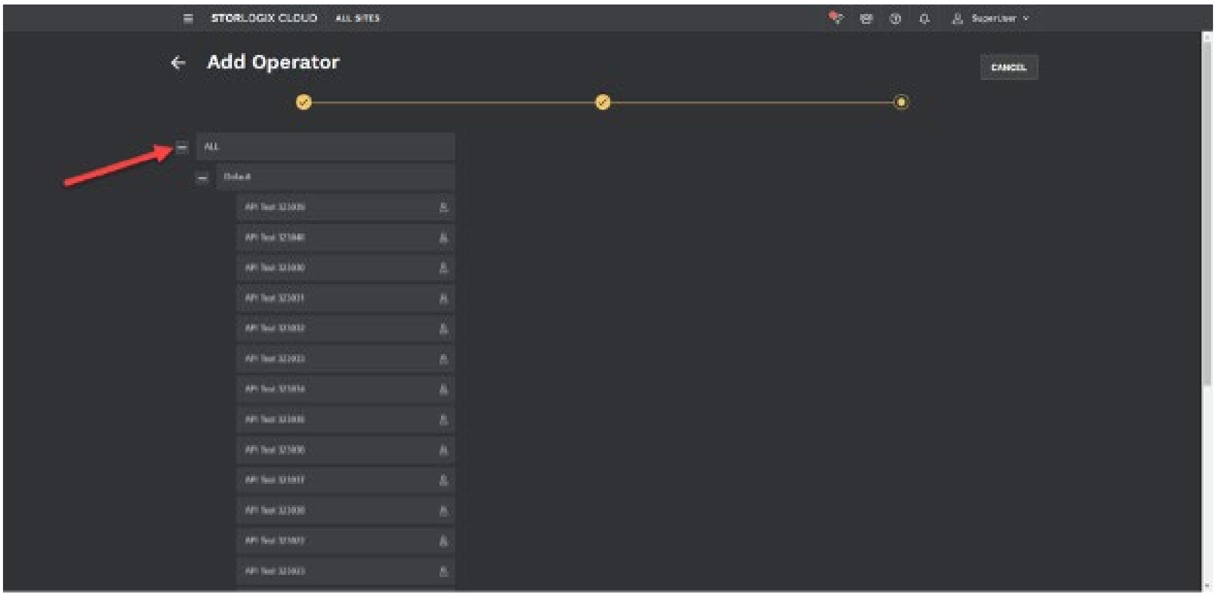


- On step 2 of Operator creation, enter the Operator's contact information; **First**, **Middle** (Optional), and **Last** name. Then enter the **Display Name**, **Email**, and **Mobile Number**. Then, click **Next**.

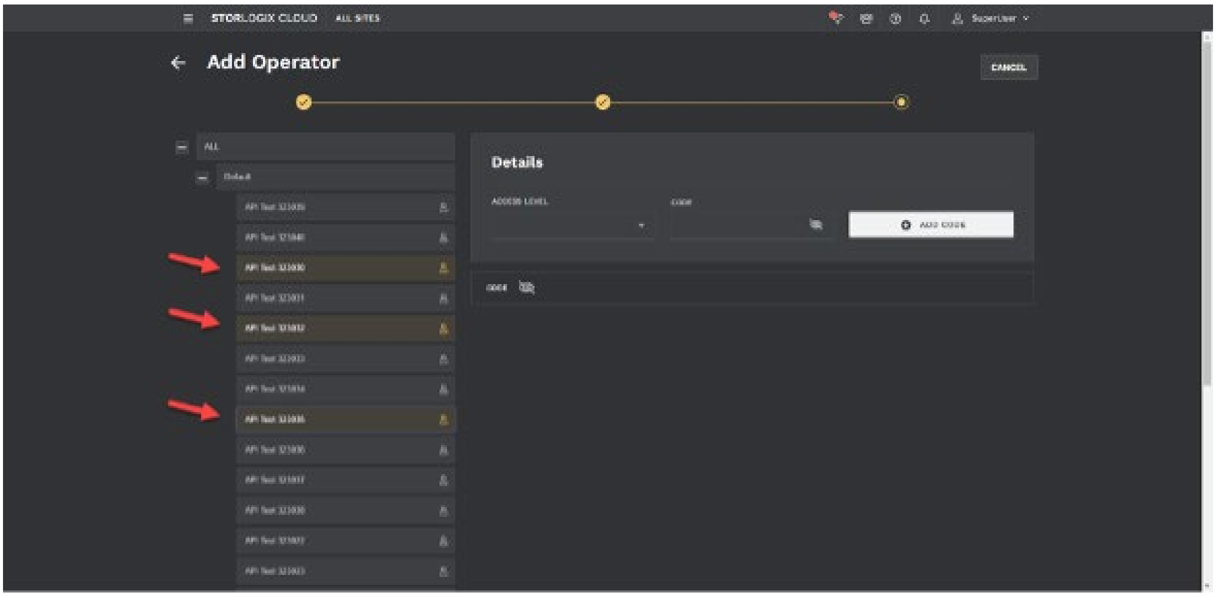


- You're now on the **Site Assignment** page. If your organization has more than one site, click the **Yellow Add** symbol to expand the Site Hierarchy.

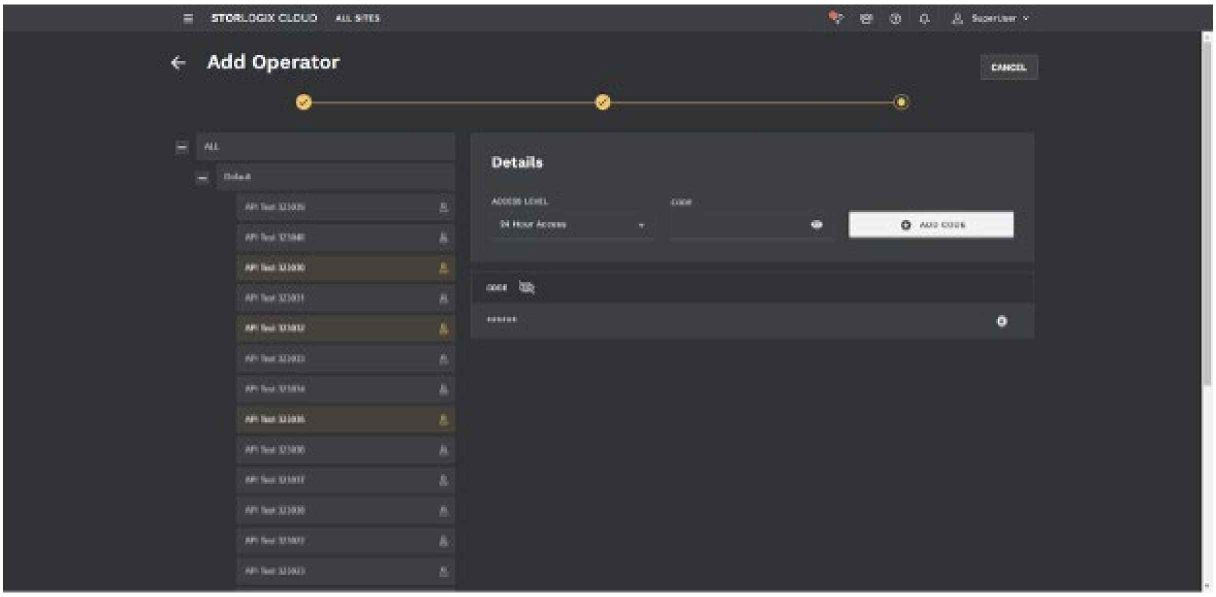
•Add Symbol 



- This is where you assign an Operator to a site. In other words, you are selecting which sites this new Operator will have access to. Click the sites that apply and notice they highlight in a yellow glow like the three shown below.



- You will also notice that a **Details** window appears to the right, containing an **Access Level** dropdown and a **Code** field. If you want to grant the new Operator <u>*physical*</u> access in addition to software access, then select an **Access Level** and add a **Code**. Do this for all sites the new Operator needs <u>*physical*</u> access. Then scroll down the page and hit **Submit**.

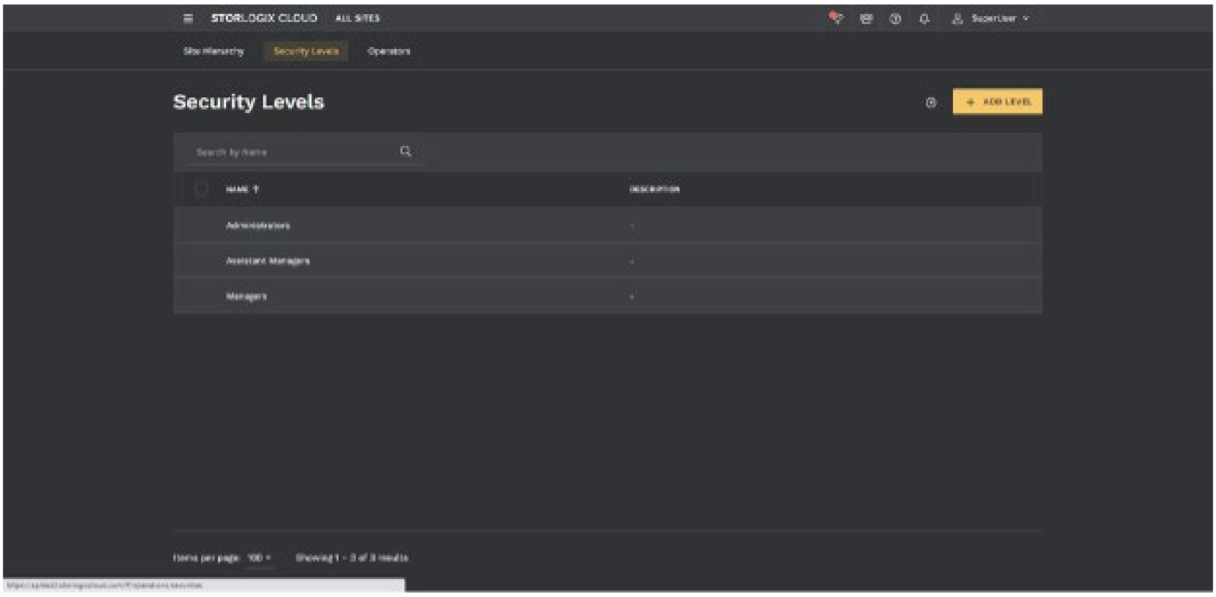


Security Levels:

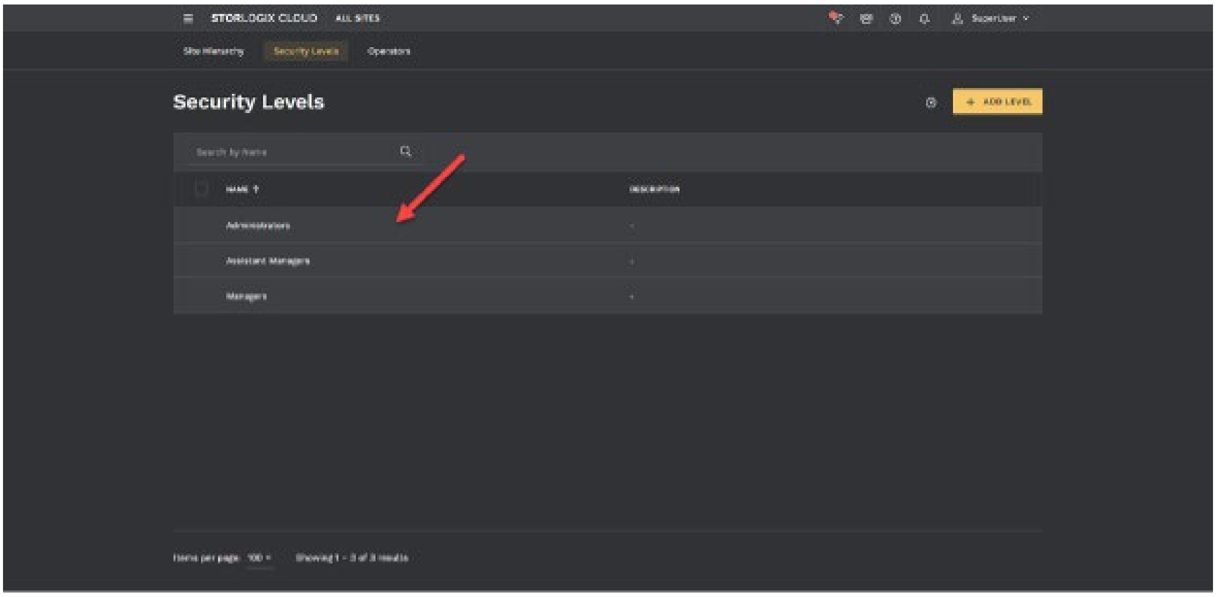
Security Levels are StorLogix Cloud roles that are assigned to each Operator. The Security Levels can be manually edited and saved to fit the needs of your unique operation. However, Administrator, Manager, and Assistant Manager roles are provided by default.

To view or edit Security Levels:

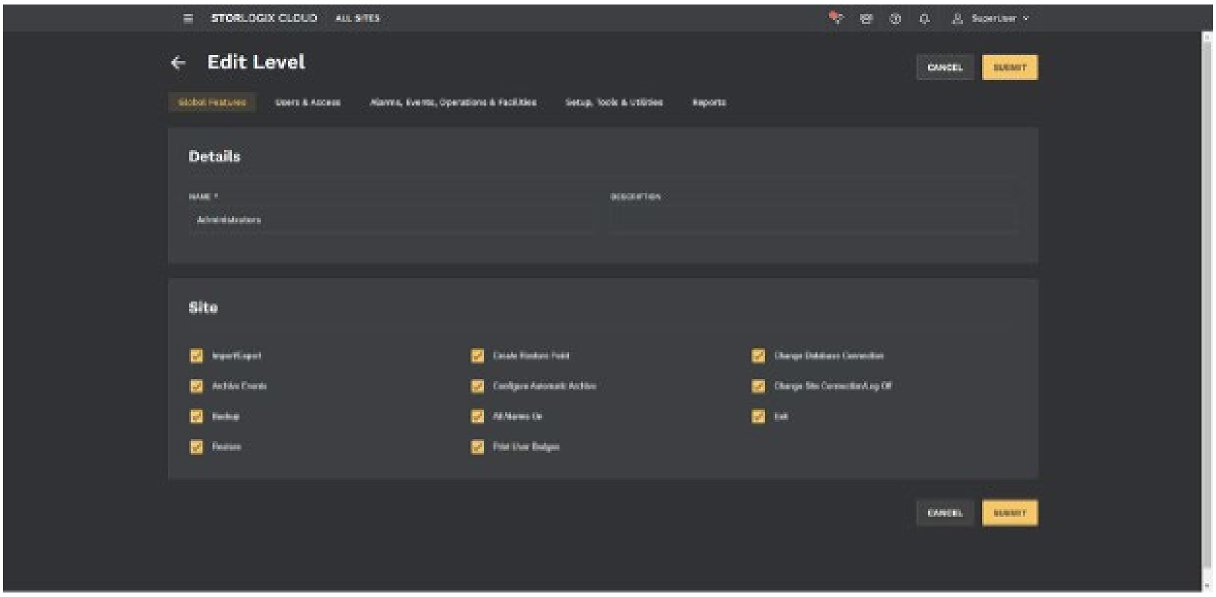
- Select **Operations** > **Security Levels**.



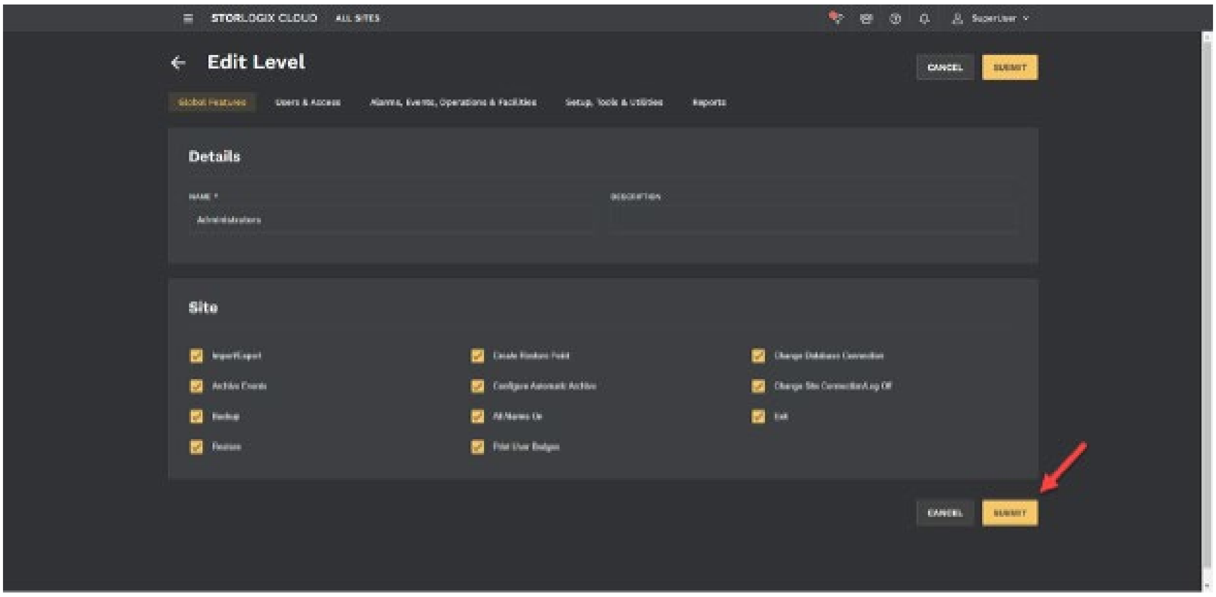
- To view or edit the permissions in a Security Level, click row.



- A configuration window will open and will detail multiple permissions. Click **Edit**. Unchecking a box will prevent any Operator assigned to that Security Level from viewing or controlling that specific feature.



- After making an adjustment to a Security Level, click **Submit**.

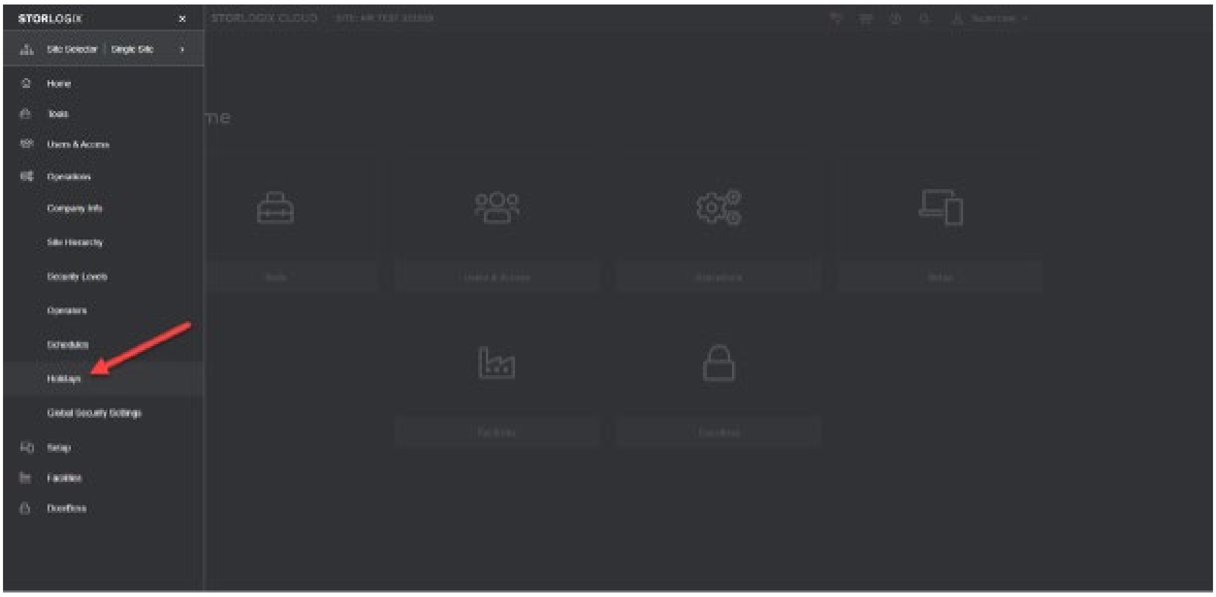


Holidays:

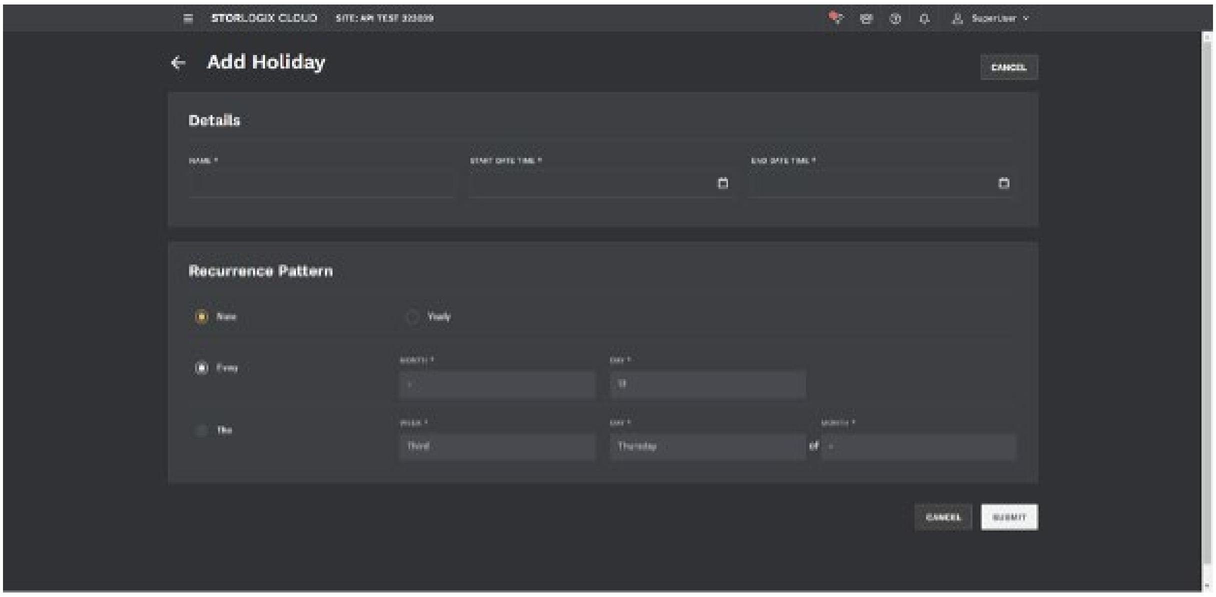
Operators need a way to streamline their schedules, and one of the features that help do just that is Holidays. Here the Operator can use default holidays like July 4th or create custom holidays to fit their specific operational needs. To view **Holidays,** first ensure you have selected a **Single Site**. This is hidden in **Multi-Site** mode.

To setup Holidays:

- Select **Operations** > **Holidays**.



- Click **Add Holiday** and create the holidays your organization observes.

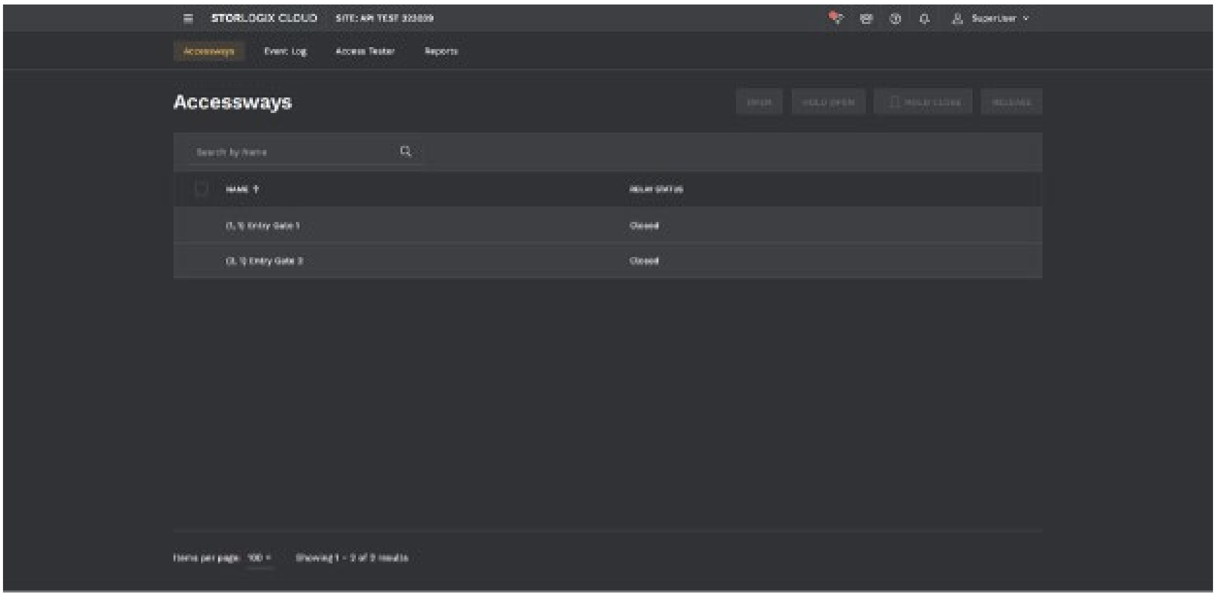


Accessways:

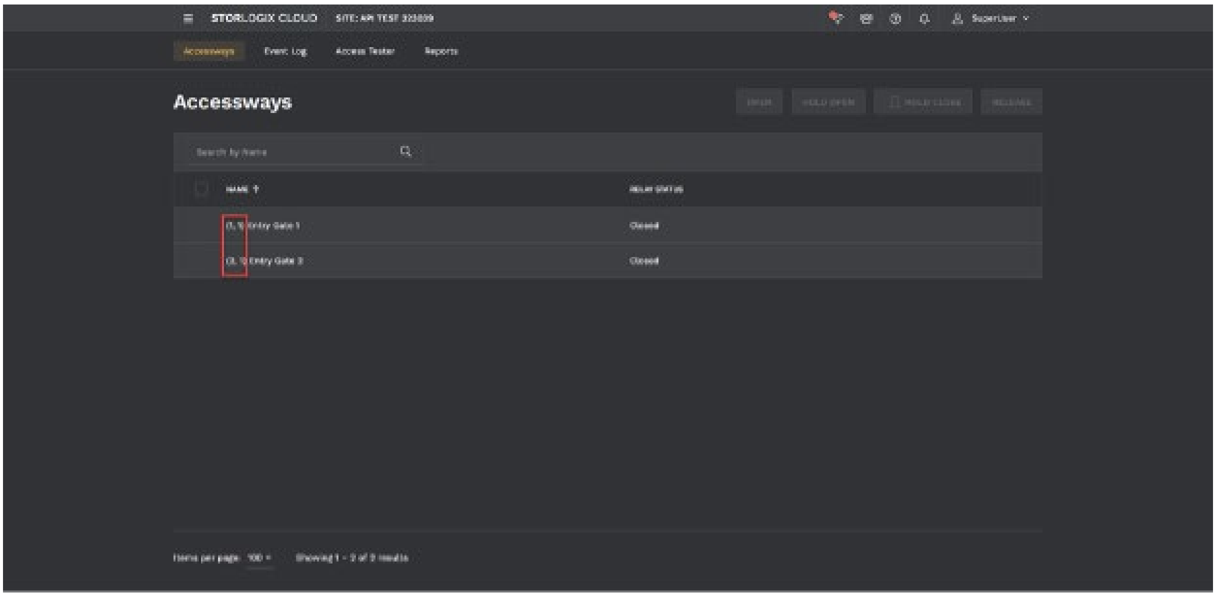
Controlling a facility's doors and gates remotely is a key reason why cloud-based software is so valuable. StorLogix Cloud makes this easy and even provides a way to control all the doors or gates at a facility at once. To view **Accessways,** first ensure you have selected a **Single Site**. This is hidden in **Multi-Site** mode.

To control Accessways:

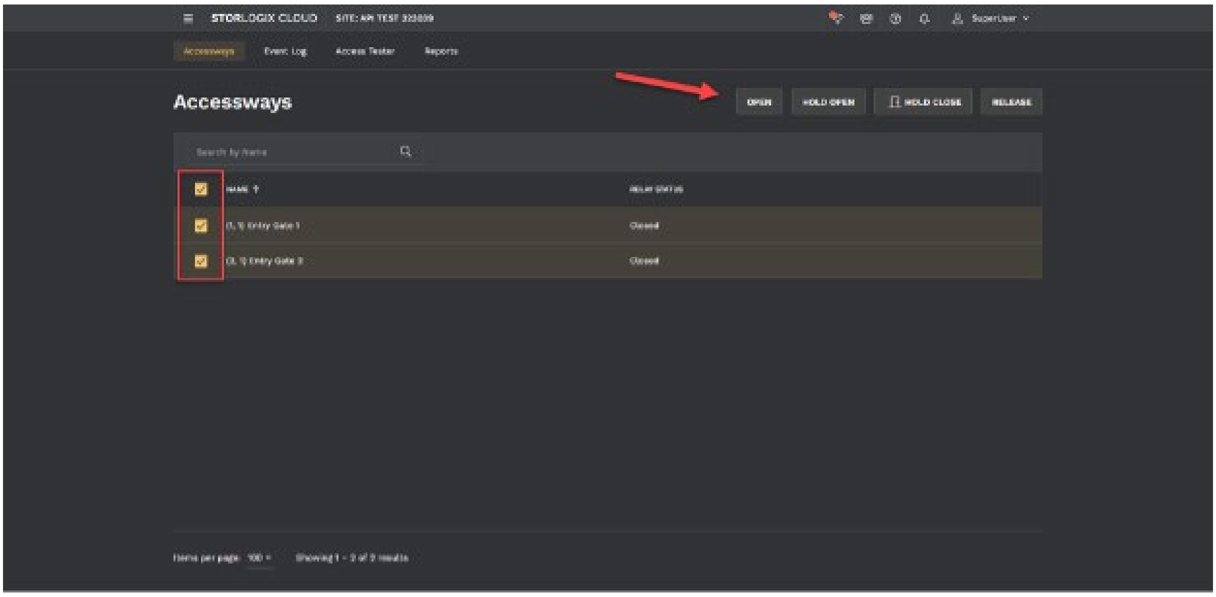
- Select **Tools** > **Accessways**.



- Each **Accessway** is a relay that an installer has selected to be manually controllable. Therefore, to the left of each **Accessway** name, you'll notice two numbers in parenthesis. These indicate the **Device Address** and **Relay** number that is controllable.



- To control an **Accessway,** check the box to the left, then use any of the four buttons in the top right.

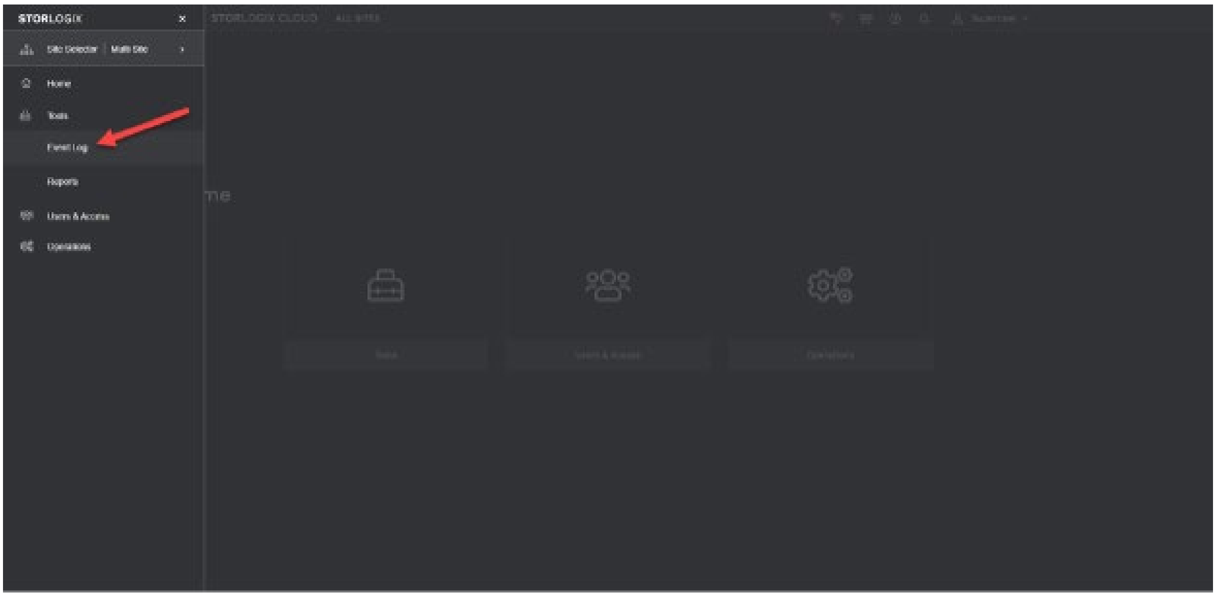


Event Log:

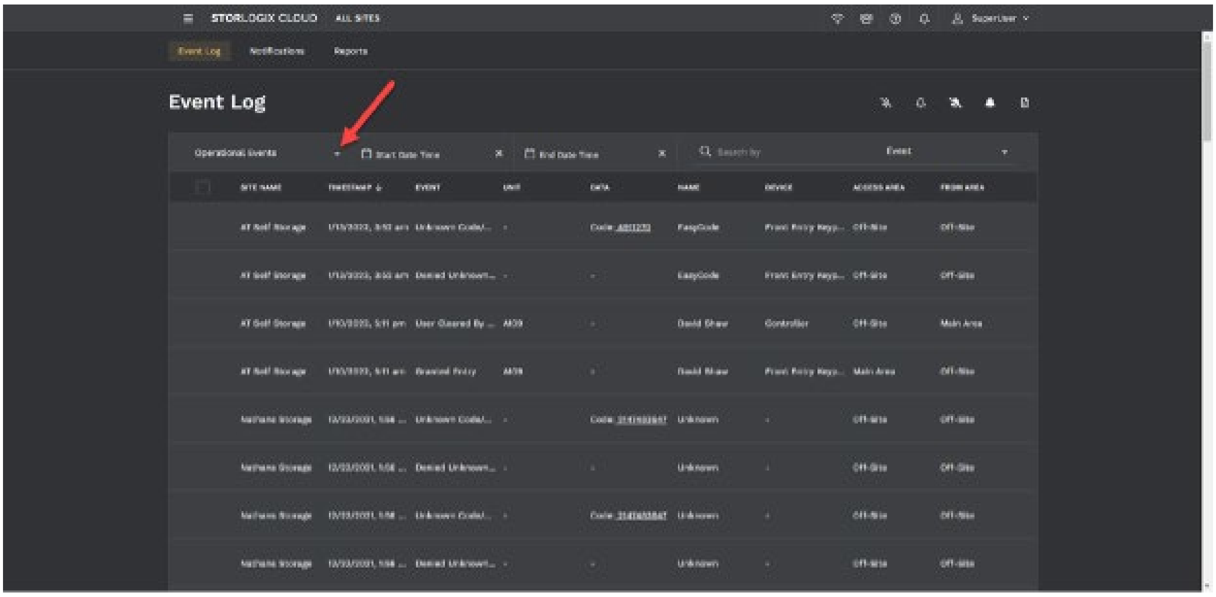
The Event Log is one of the most widely used sections in StorLogix Cloud. Every access control-related event is displayed in the section. You can watch as real-time events populate the table, search for specific events, and troubleshoot in the tab. This is also viewable in **Multi-Site** mode allowing the Operator to view multiple sites' events in a single table.

To view the Event Log:

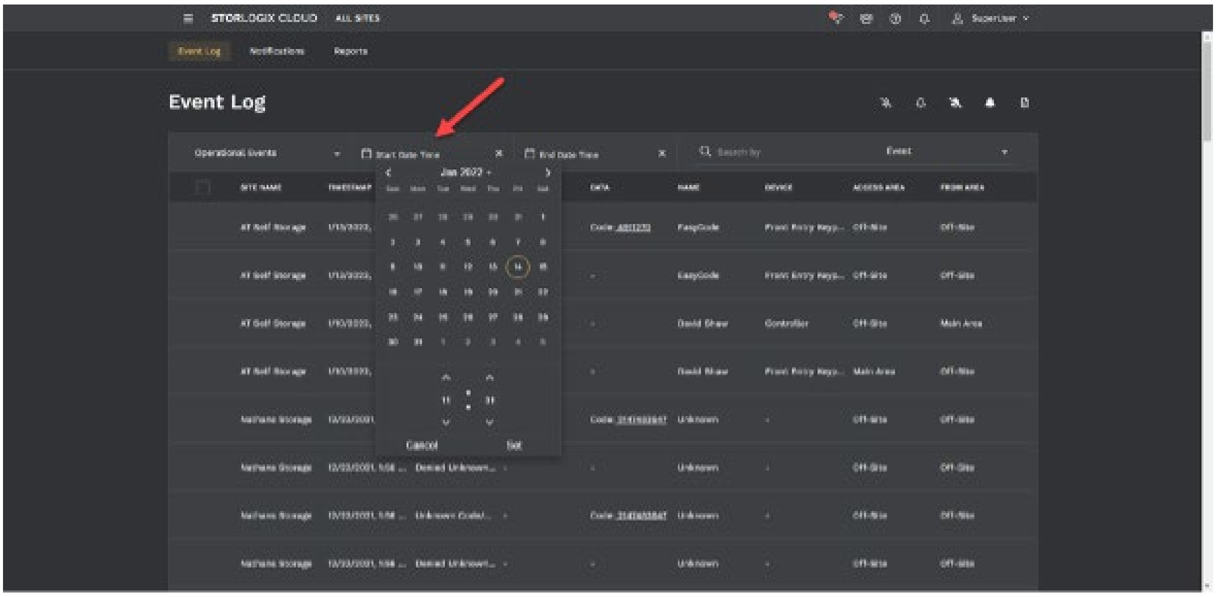
- Select **Tools** > **Event Log**.



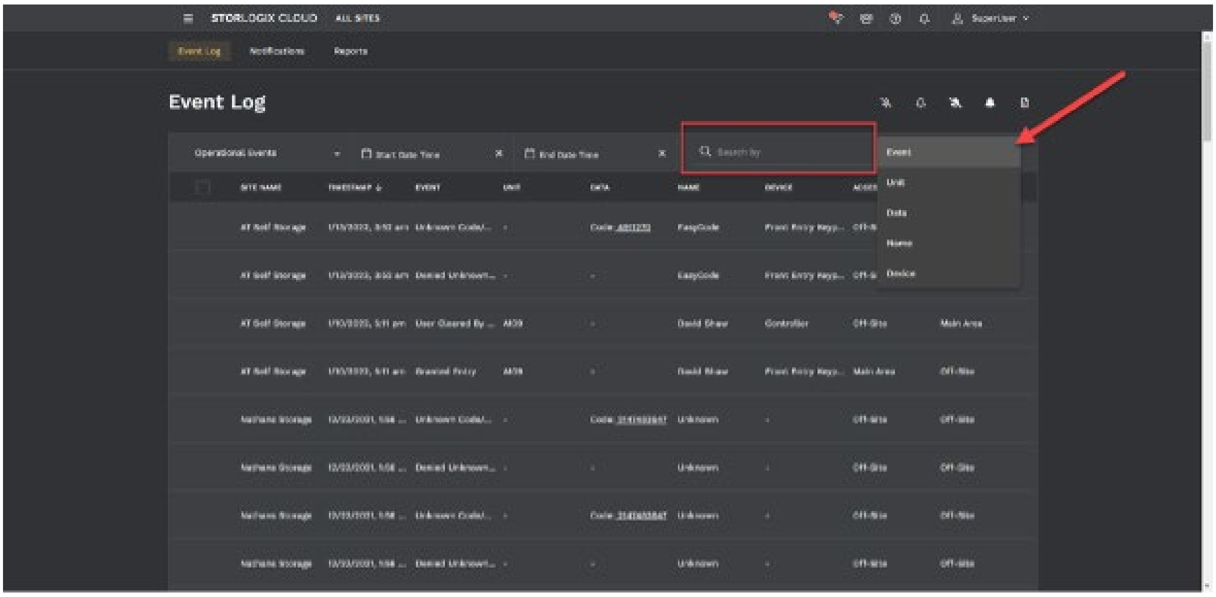
- You will notice that the Event Log defaults to displaying **Operational Events**.
  - Select the dropdown on the left side to change the type of events you'd like displayed.



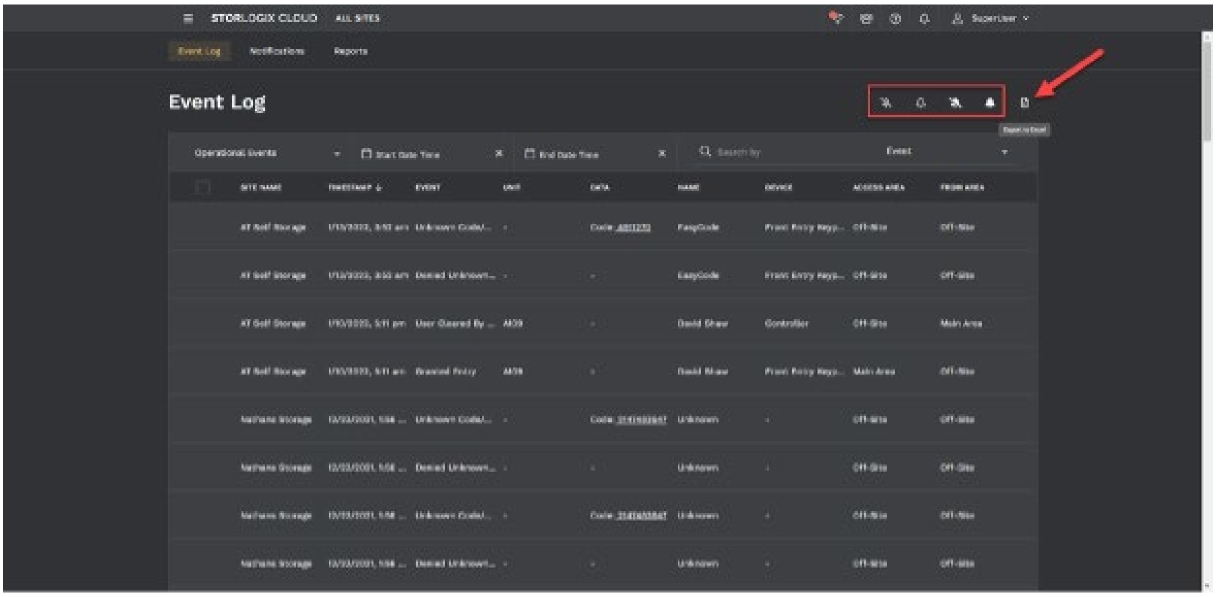
- You can search by name and date to find a specific event. When selecting a timeframe, be sure to click **Set** below the calendar.



- An Operator can also search a specific column for keywords or names by selecting the column in the dropdown on the right and using the **Search By** field to complete the search.



- There are several buttons for clearing and silencing alarms and even an option to **Export** the Event Log data that have been queried. Just click the **Export** button on the top right.

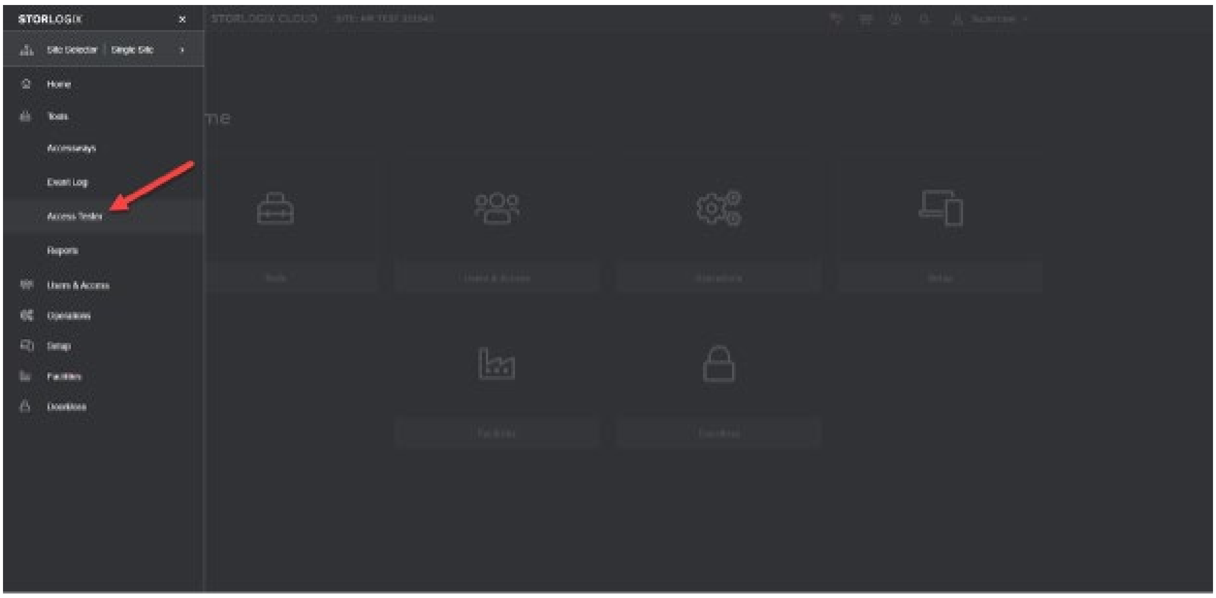


Access Tester:

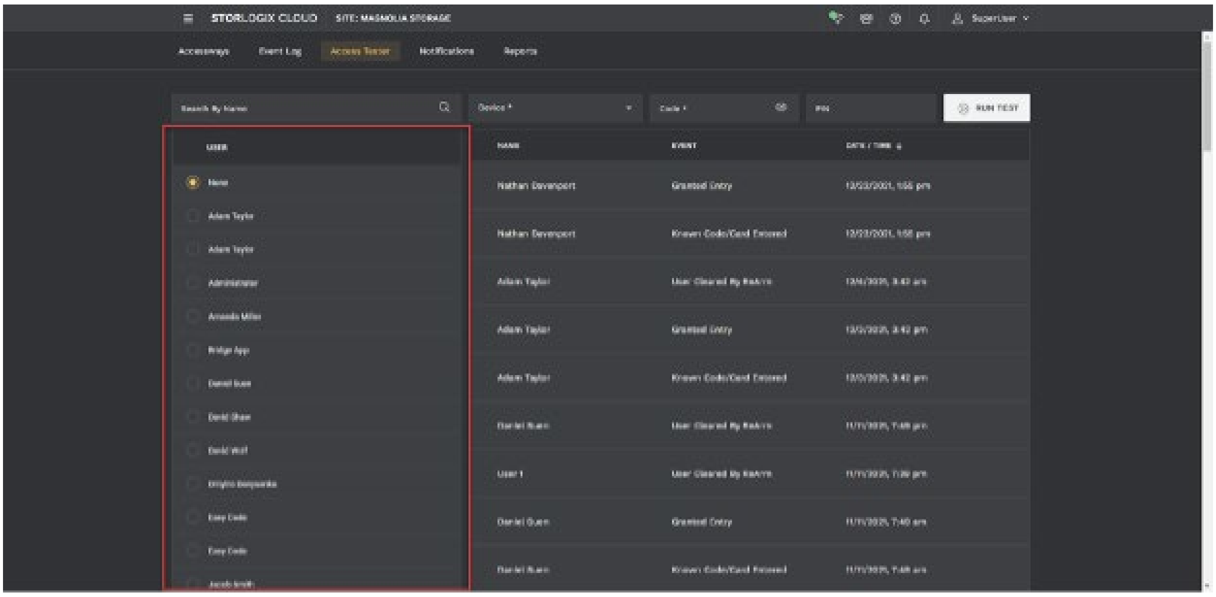
The Access Tester tests a site User's access code at a specific entry/exit device. This is especially valuable when testing a new tenant's code at the entry keypad immediately after onboarding. On non-cloud-based systems, this would often require site managers to walk a tenant out to the entry keypad. Using the Access Tester in StorLogix Cloud, a Site Manager can remotely test a new tenant's code. The Access Tester is a section only available in **Single Site** mode.

To view the Access Tester:

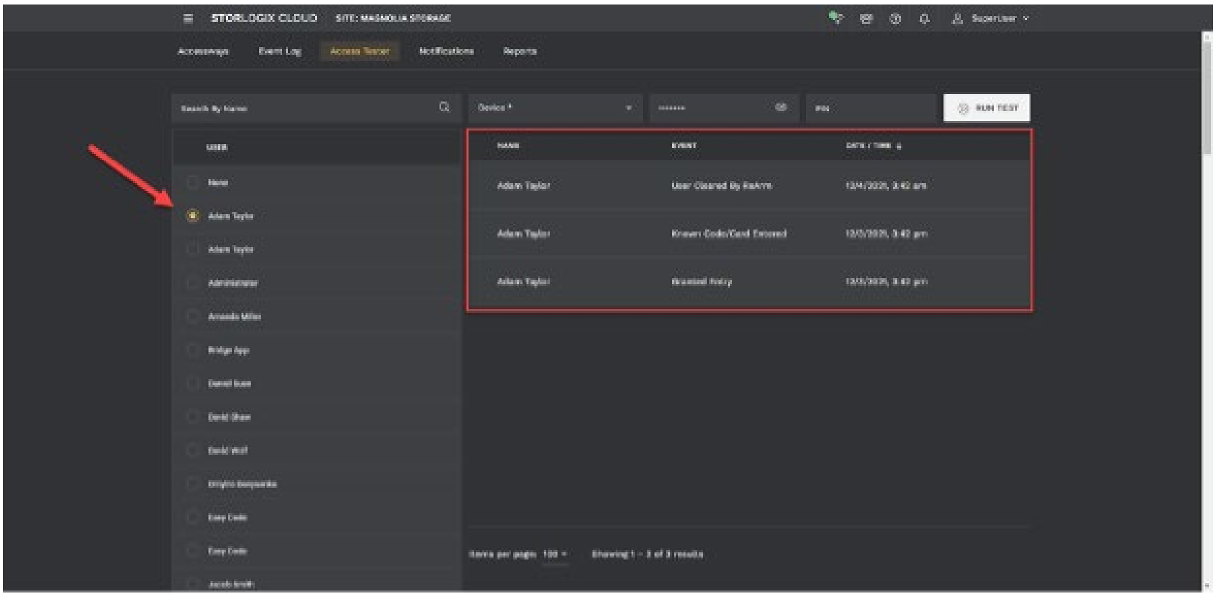
- Select **Tools** > **Access Tester**.



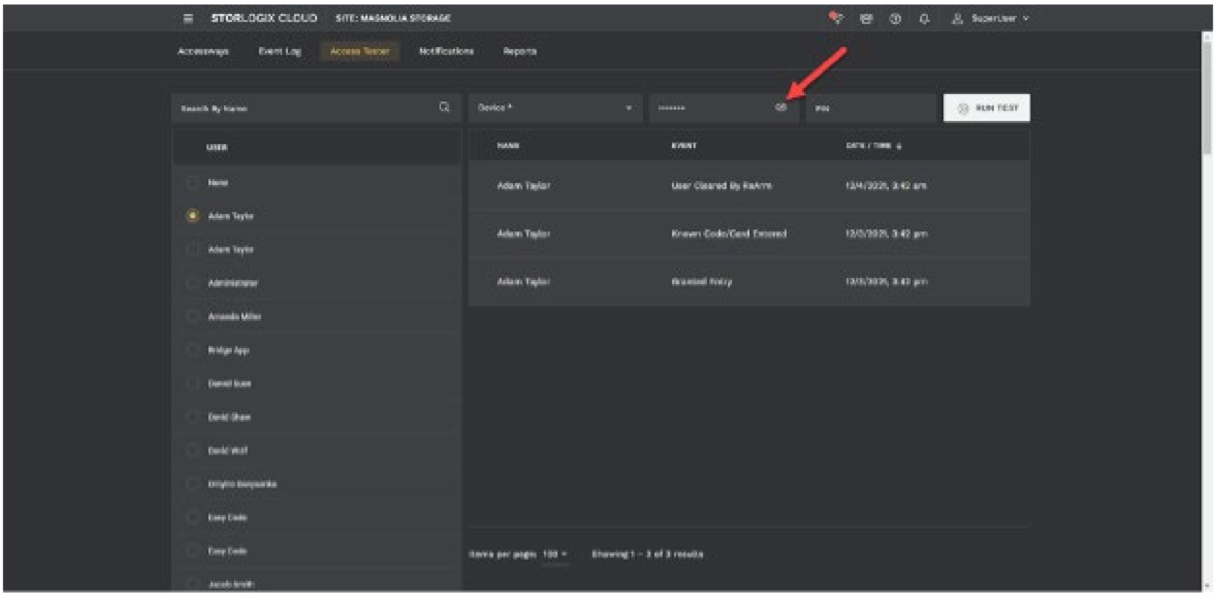
- You will notice that all StorLogix Cloud Users are listed on the left-hand side of the page.



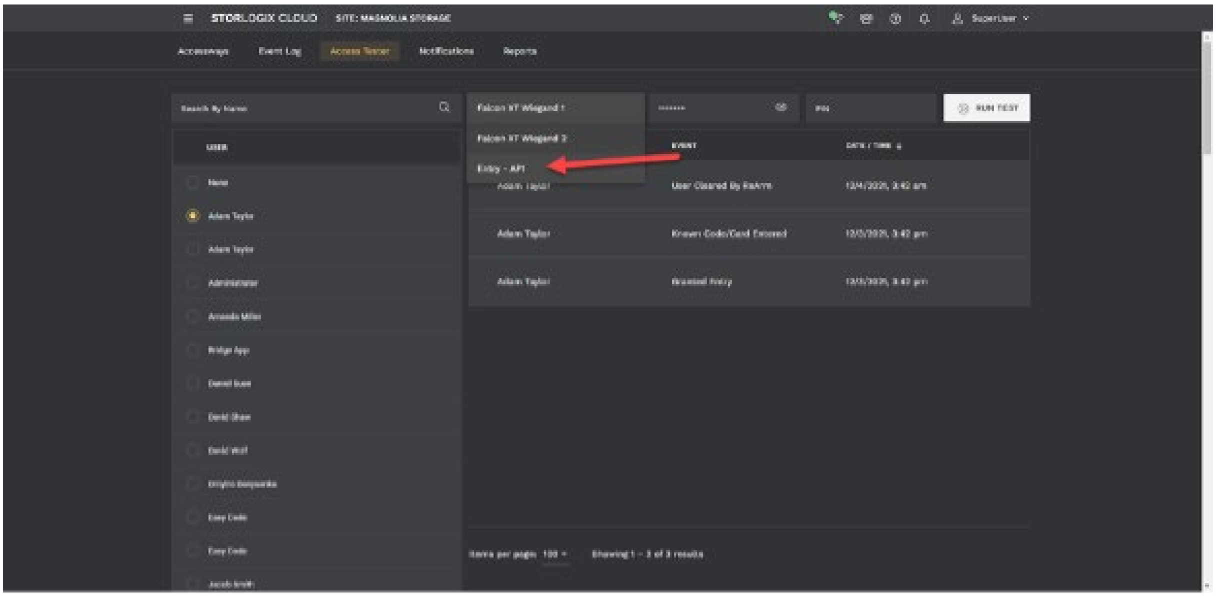
- To test a User’s access, click on one of the names.
    - The radio button will light up yellow to the left of the name, indicating that the User has been selected.
    - You should also notice that the user’s most recent access history appears to the right.



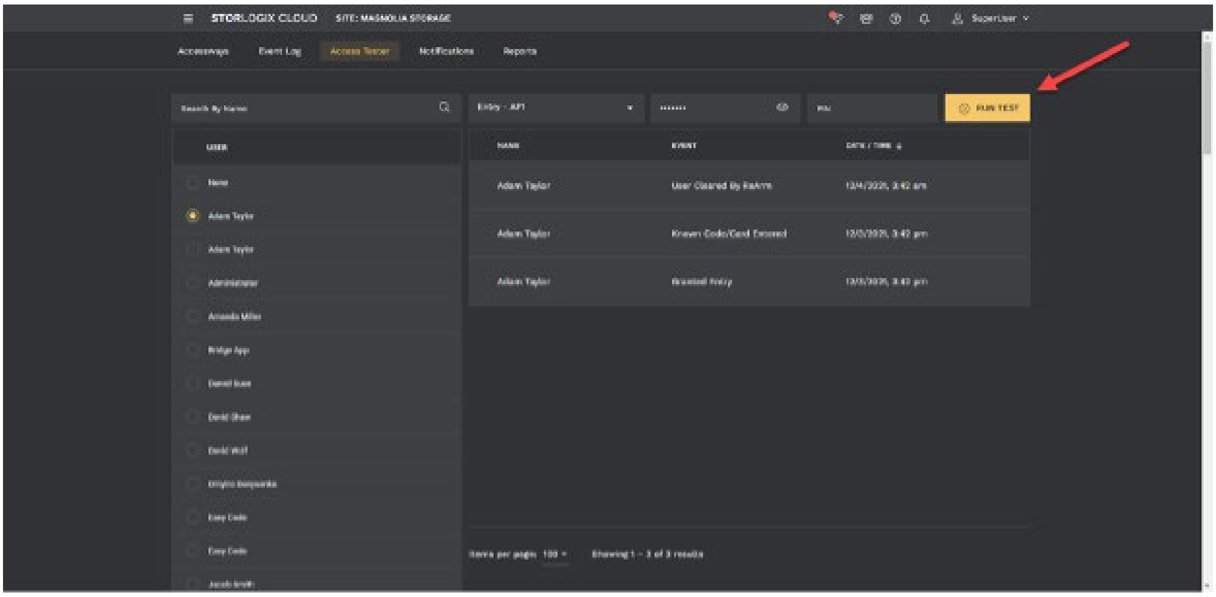
- Also, you should see the User’s Access Code appear under the **Code** Click the eyeball to the right to view the code.



- Finally, select the **Device** you would like to test the code on by clicking the dropdown.



- Then, click **Run Test**.



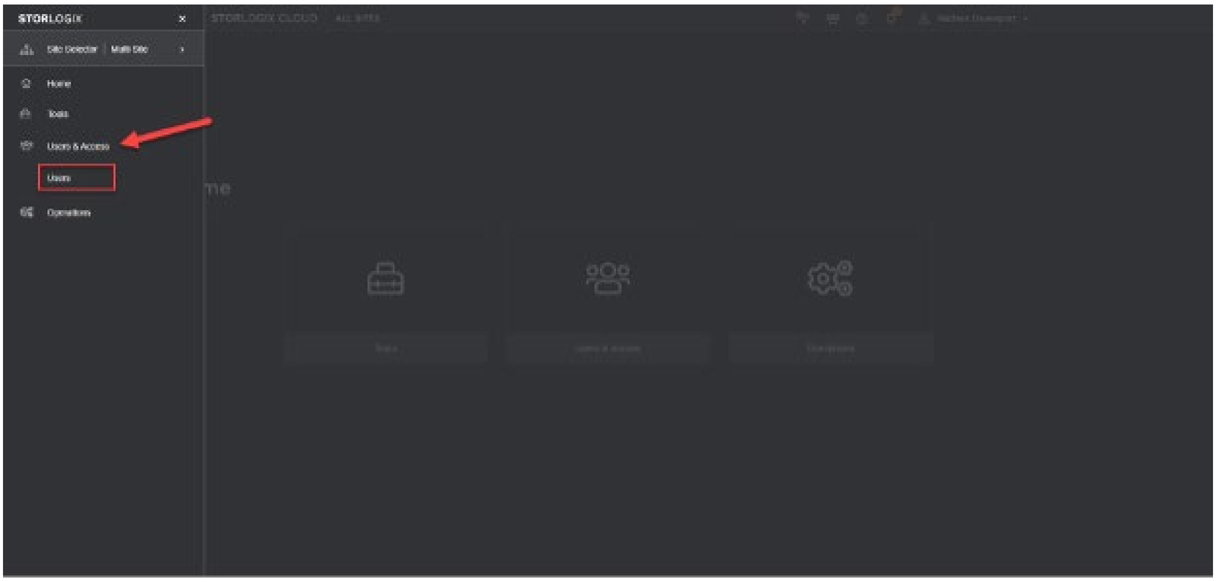
- If the test is successful, you will see a success message. If the device you are testing is connected to a gate, you will also see the gate open (*if it's not being held closed*).

Users:

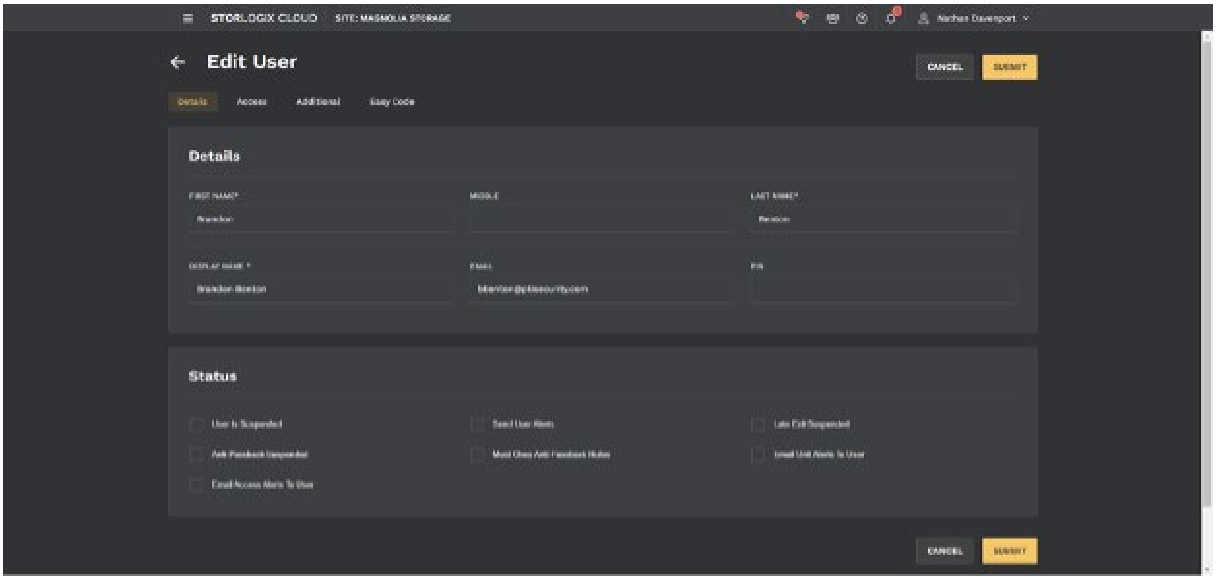
The Users section displays every StorLogix Cloud User. A User is defined as a credential holder to the physical site and is ultimately managed within StorLogix Cloud. This could be tenants renting units or people who are not renting units but have access to the site, like the cleaning crew and landscapers. **Users** can be viewed in a Multi-Site or Single-Site view.

To view Users:

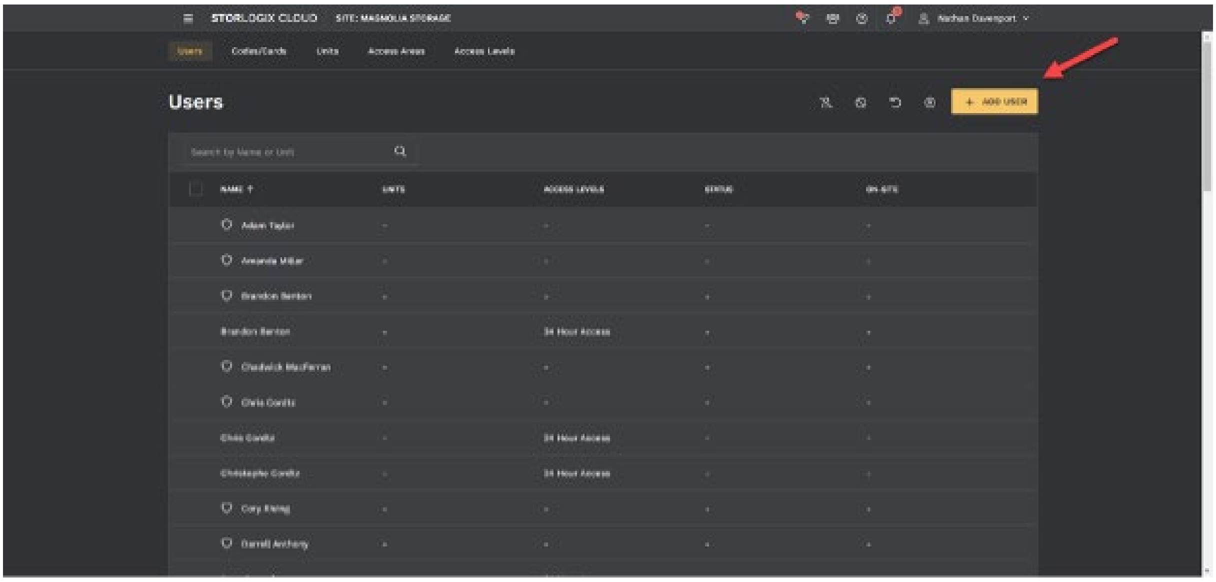
- Select **Users & Access** > **Users**.
- The **Users** section will allow the Operator to search or view any User in both Multi-Site mode and Single-Site mode. However, Multi-Site mode will only allow the Operator to view and search for a name.



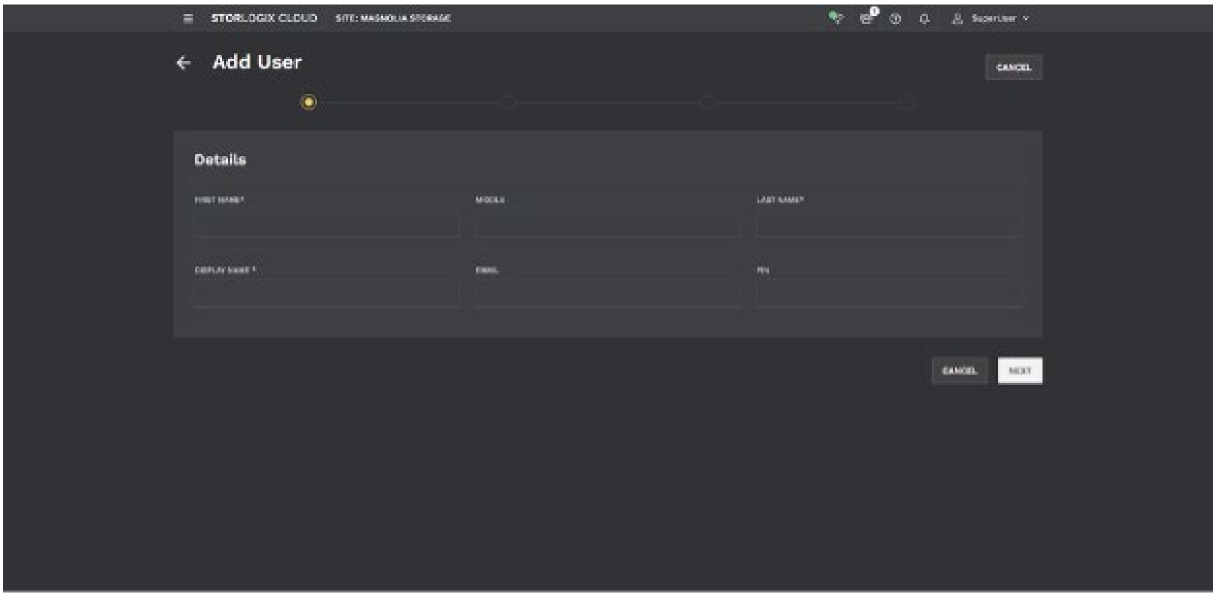
- In Single-Site mode, clicking on the User's row will open up the **Edit Users** window.
    - IMPORTANT: You will not be able to view a User's access code in this Window. That is found under the Codes/Cards tab and is explained later.



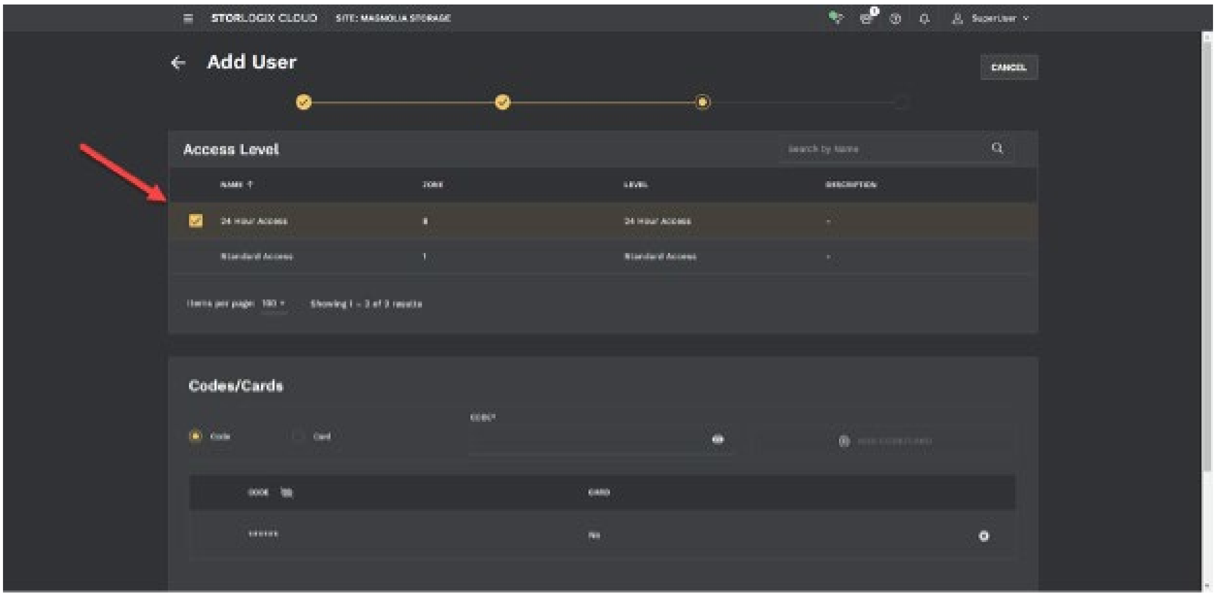
- To Add a User manually (*not through your property management software integration*), click the **Add User** button.



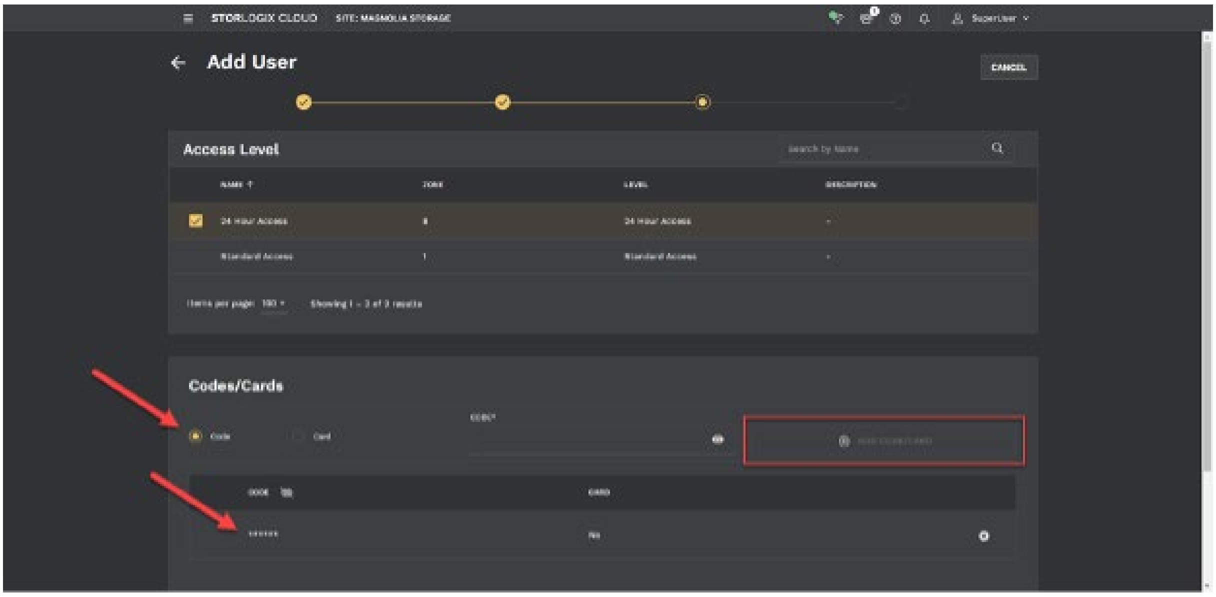
- This will display the **Add Users** Fill out the required fields to complete the action.
  - Be sure to check the **Authorized to use EasyCode** checkbox if you would like them to have that access.



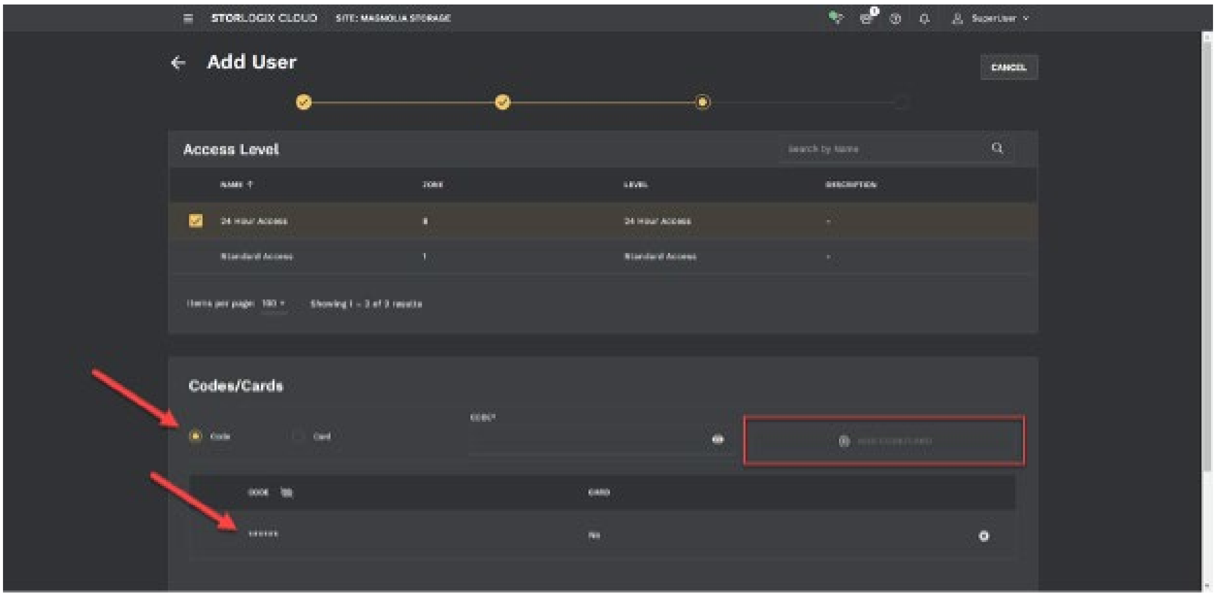
- Click **Next** to select an **Access Level** and create a code.



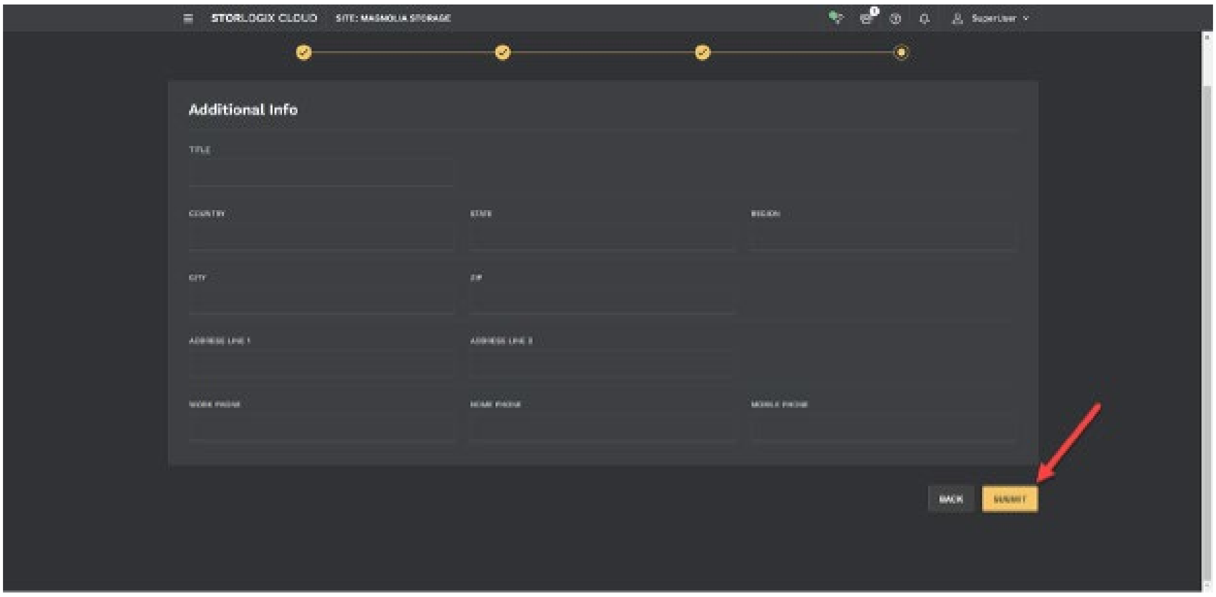
- If using a physical **Card**, toggle the switch to the right and select an available card from the drop-down. Be sure to **Add Card** before clicking **Next**.



- If the User will use an **Access Code** to enter the site, keep the toggle to the left.
    - Then enter a numeric code in the **Code** field. Be sure to click **Add Code** before clicking **Next**.



- The last step is adding optional additional information.
    - Once complete, hit **Submit.**



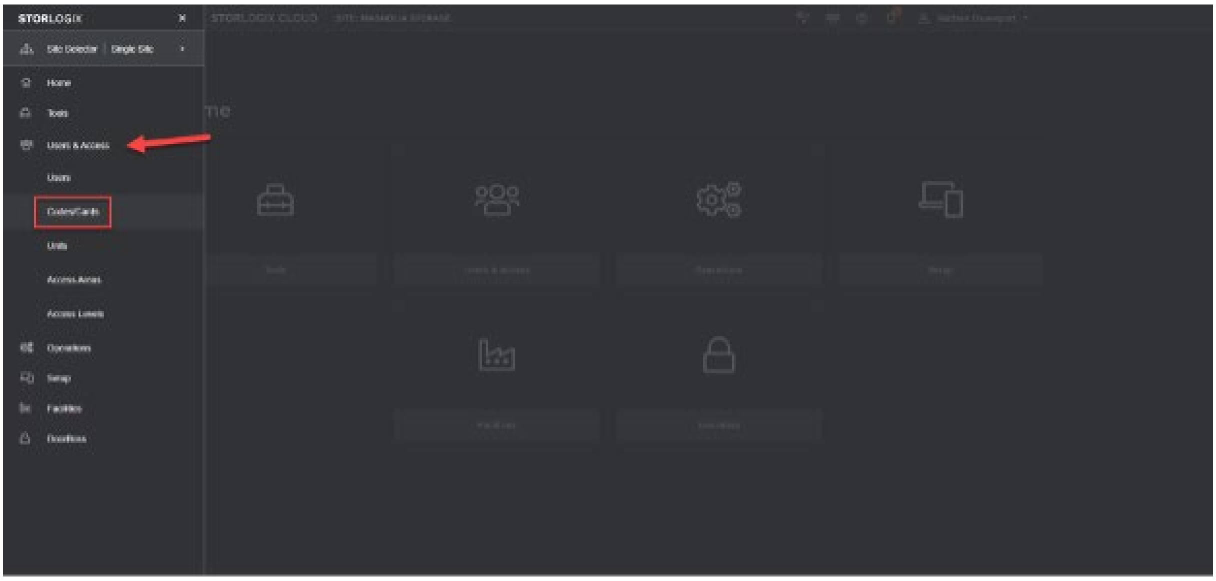
- The new User will now be added to the **User** list.

Codes & Cards:

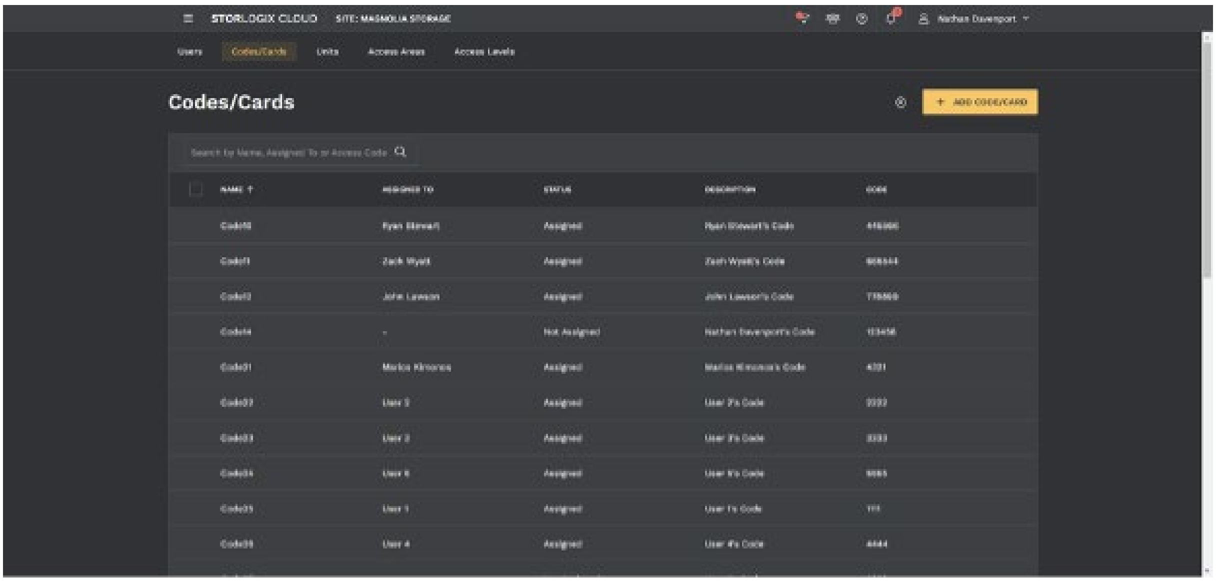
The Codes and Cards section displays all the access codes and cards that are stored in StorLogix Cloud. Here you can view access codes assigned to specific tenants and even procure Cards for later use. This section is only visible in Single-Site mode.

To view a User's Access Code:

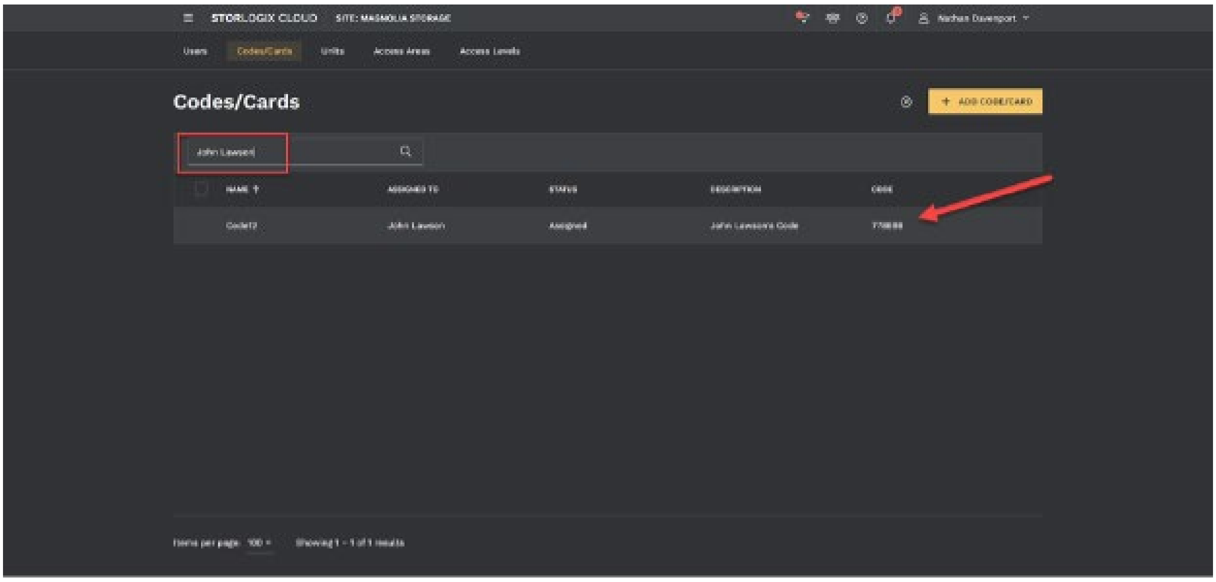
- Select **Users & Access** > **Codes & Cards**.



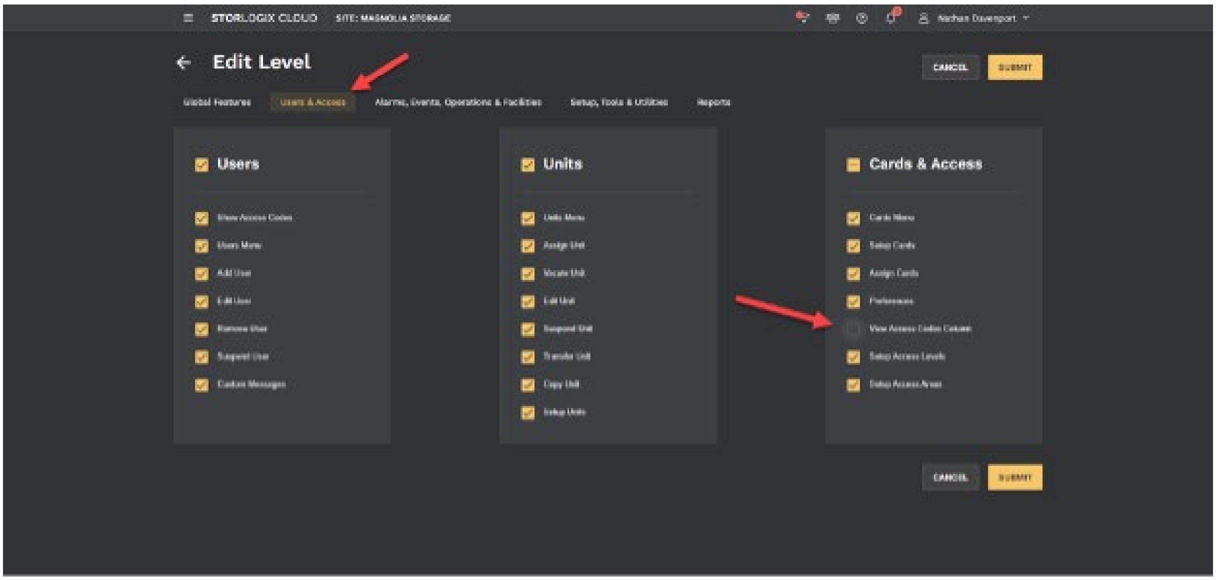
- You will land on a page with Access Codes and Cards displayed in rows.



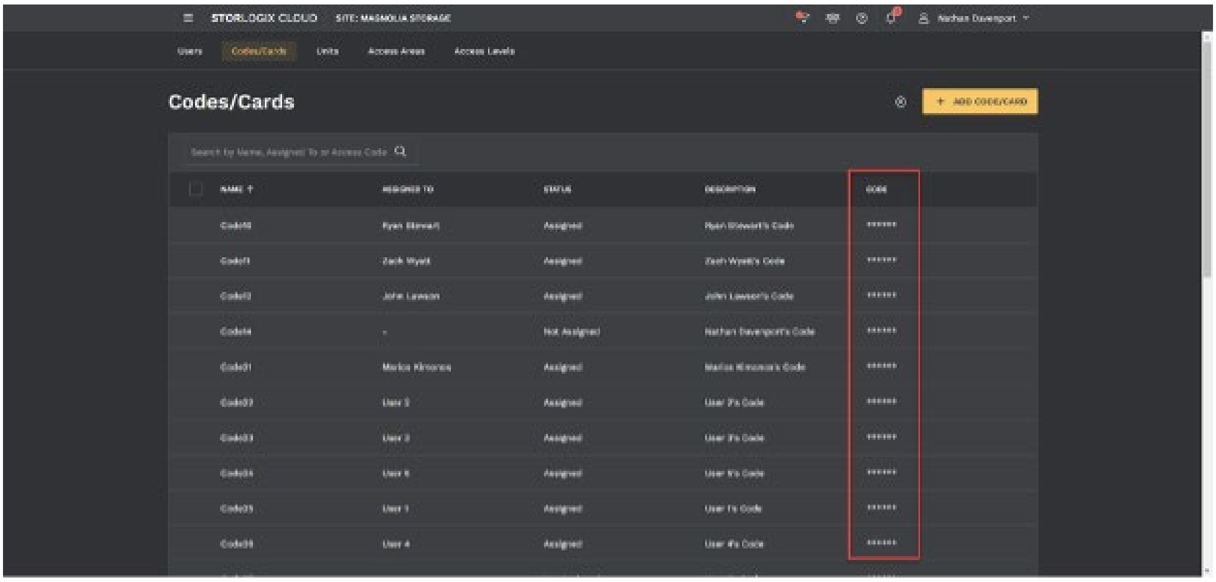
- To search for a code assigned to a User, type the User's name in the Search Field.
    - The record should appear with the User's name and Access Code listed.



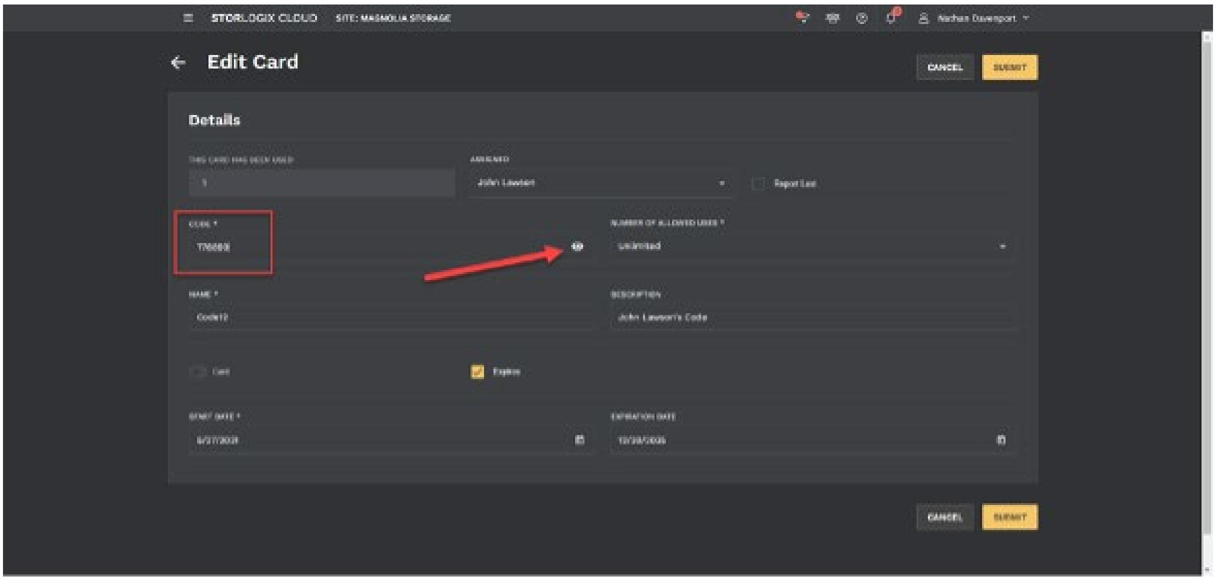
- Because this is a cloud solution, it’s important to think about hiding this **Access Code** column for some employees. It may not be wise to display a page with every User and their associated Access Codes.
  - As a StorLogix Cloud Administrator, you can elect to hide numbers in this column if it’s not necessary for a specific level of management.
  - To do this, select **Operations** > **Security Levels** tab.
  - Click the Security Level you want to adjust and go to the **Users & Access** tab in the **Edit Level** window.



- Unchecking this box and clicking **Submit** will prevent any Operator assigned to this Security Level from seeing the numbers in the Access Codes column on the **Codes/Cards** tab.
- Below is an example of when the Codes are hidden



- The Access Code column is still visible, but the numbers are blocked out with asterisks.
  - The Operator can still view a single code at a time by clicking the Access Code row and then clicking **Edit,** then the eyeball in the Edit window.

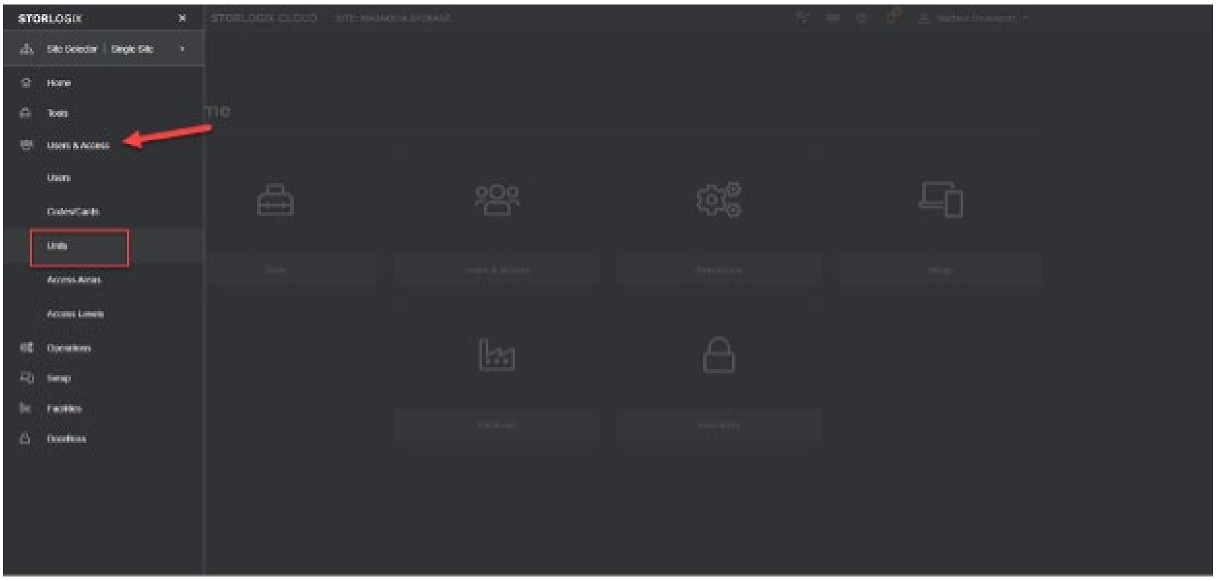


Units:

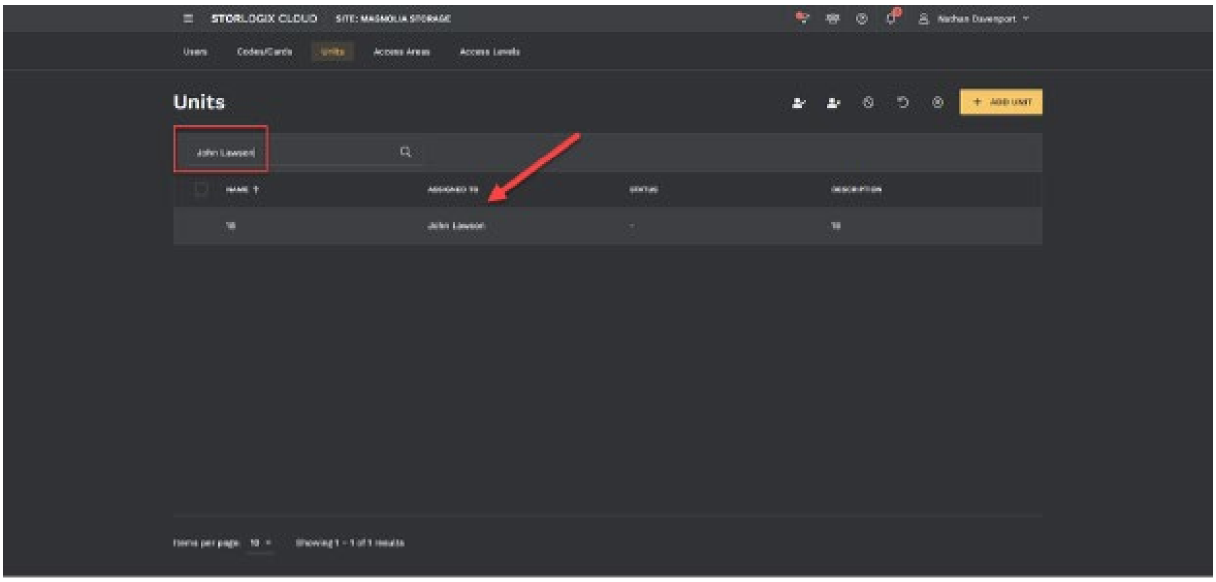
The Units section displays every storage unit in StorLogix Cloud. The names, tenant assigned, status, and description are all listed in the table and can be searched to find specific information quickly. The Units section is only visible in Single-Site mode.

To view Units:

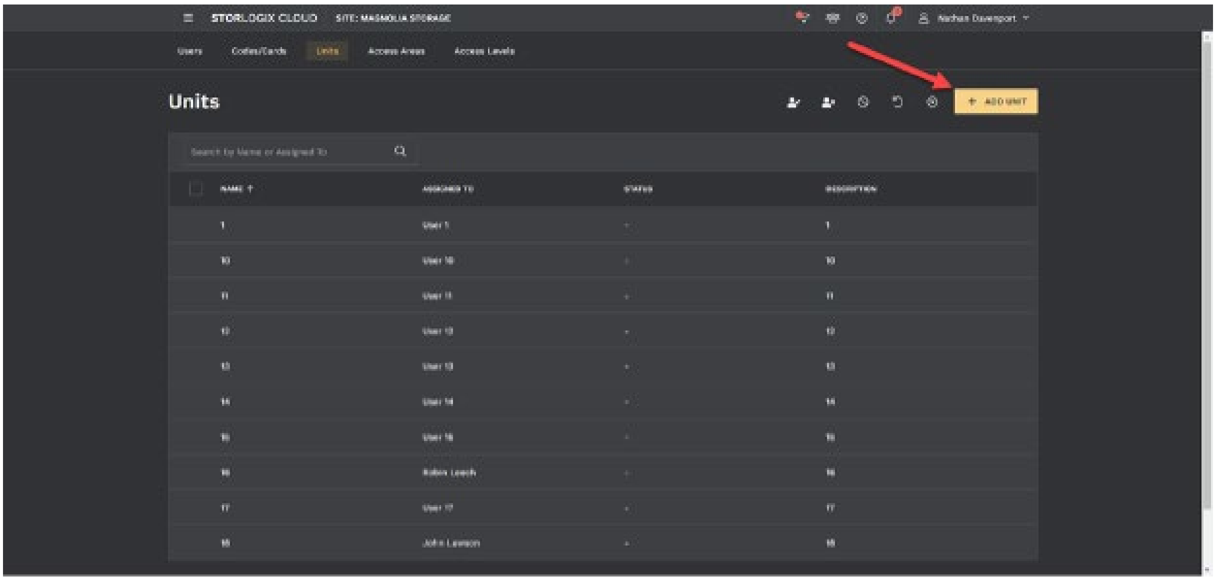
- Select **Users & Access** > **Units**.



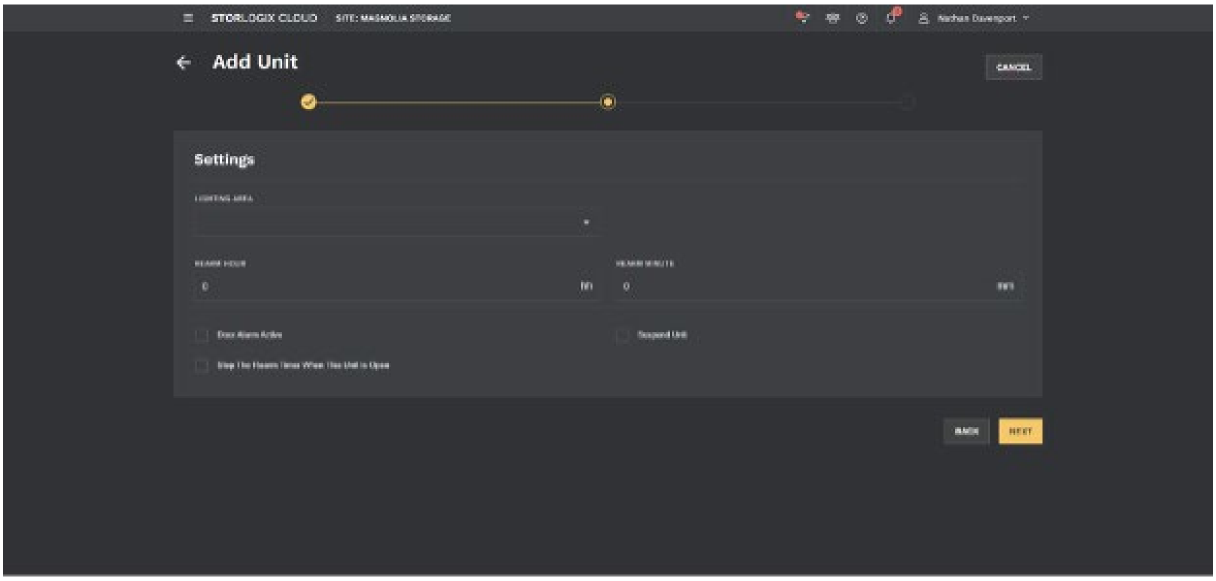
- You will see all your units listed in the table. You can scroll to the bottom of the page and click the *Arrow* symbol to switch to the next set of units, or you can search by unit **Name** or **Assigned To**.
- Searching by **Assigned To** is the quickest and easiest way to locate a tenant's (User's) Unit.



- To add a unit manually through StorLogix Cloud rather than through your property management software, click **Add Unit**.



- A configuration window will appear where you will enter a **Name** for the unit and even provide a unit **Description** if applicable.
- Be sure to assign it to the appropriate **Access Level** and **Lighting Area**.
- The additional fields and settings apply to units with door alarms. If this unit utilizes door alarms, you will need to address the additional information.

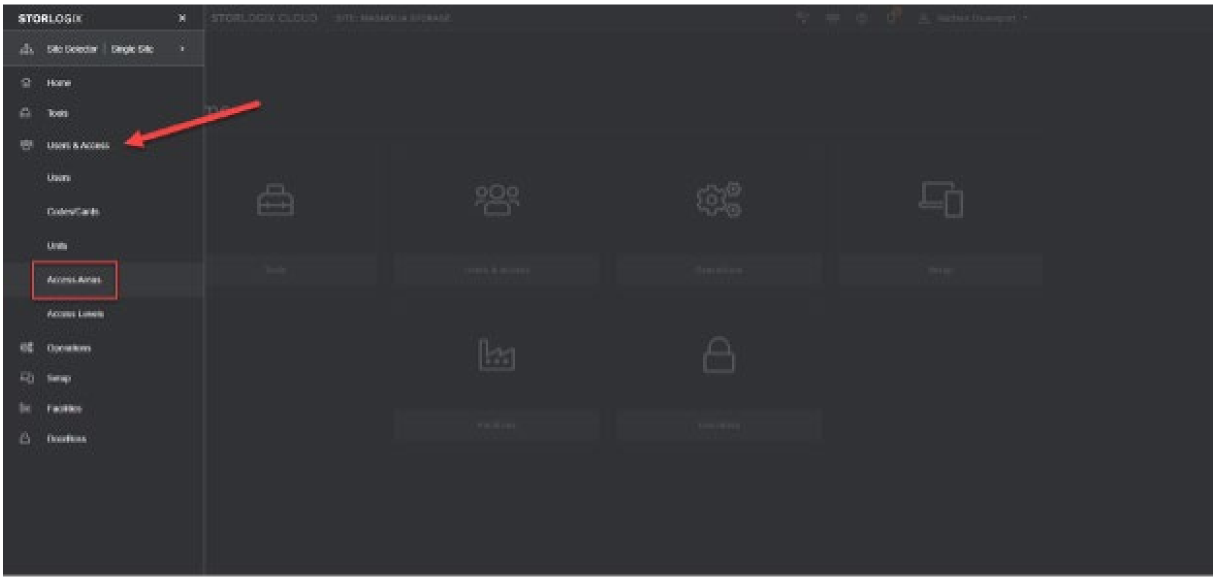


Access Areas:

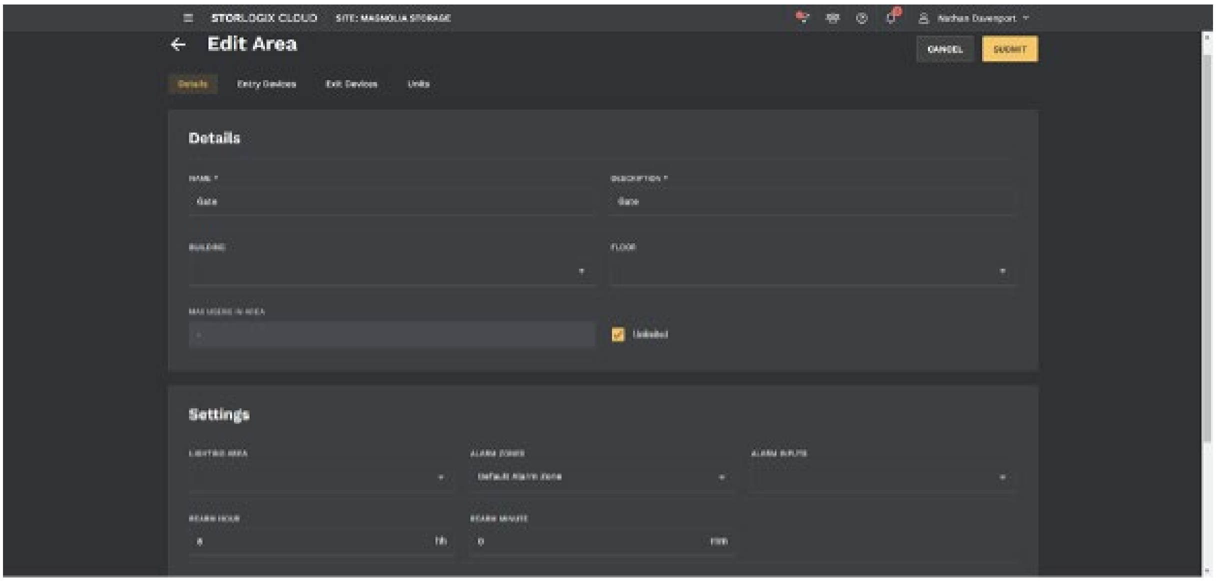
Access Areas are enclosed parts of the site where access is controlled by a Keypad or a Card Reader. This will include the Default area (commonly called ‘On-site’), which is the entire site enclosed by the fence and accessed through the gate or main door. It will also include any building where the door access is controlled by an access device, any floor accessed by a controlled elevator keypad, and any gated or walled area within the property controlled by an access device. Access areas do NOT include individually alarmed units, alarmed office areas, or any other part of the site that does not have individual access-controlled doors or gates to enter. The Access Area section is only visible in Single-Site mode.

To view Access Areas:

- Select **Users & Access** > **Access Areas**.



- To edit an **Access Area,** click on the row.
    - The **Edit Area** window will appear and be organized into four tabs named **Details**, **Entry Devices**, **Exit Devices**, and **Units**.
        - In the Details tab, you can edit the name and provide a description.
        - Additionally, if this Access Area is inside a specific Building, select the Building.
            1. Buildings must already be set up in the **Buildings** tab under the Facilities section.
        - If the Access Area is on a specific floor of a building, select the Floor.
            1. Buildings must already be set up in the **Buildings** tab under the Facilities section.
        - If the Access Area has a lighting area within it, select the Lighting Area from the list.
            1. Lighting Areas must already be set up if you are using this function.



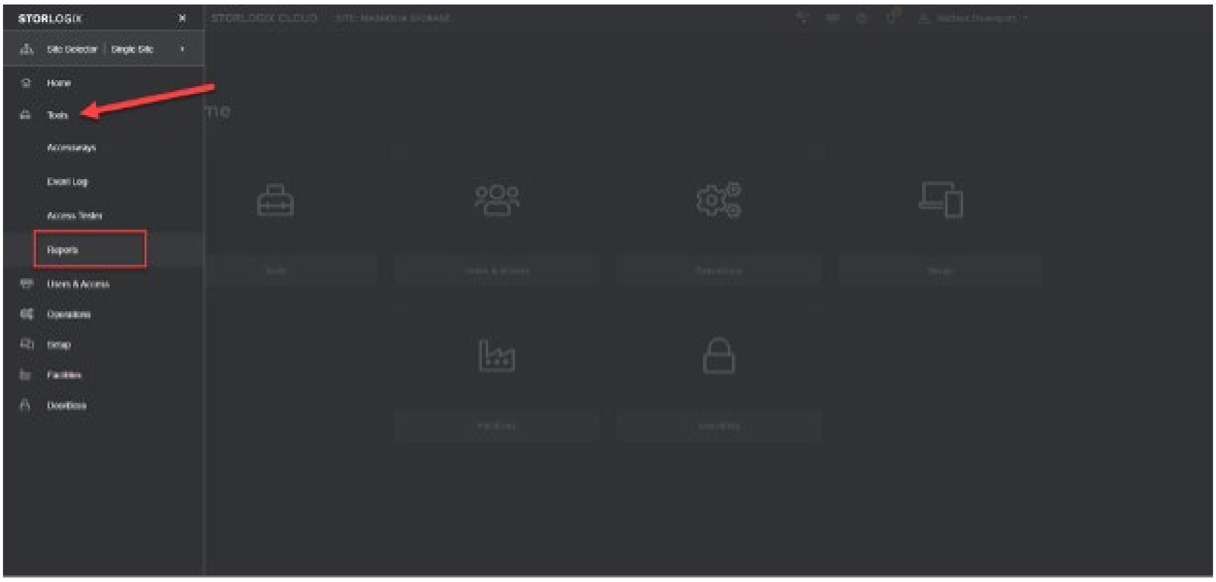
- The **Maximum # of Users** in Area can be set to control how many users can be in an area simultaneously. This is a high-security function and will usually be set to Unlimited – 0.
    - You can type any number limit in the field that you desire.
- Rearm Wait Time: (H:M) is how long the system will wait after the last user has logged out of the area to turn out the lights and rearm alarms (if you are using lighting areas and Alarm Inputs to the area).
- There are two options for shutting down access to the area.
    - Suspend All Access into This Area prevents all access into the area but allows anyone inside the area to exit.
    - Lock Down All Access Into and Out of This Area prevents anyone from using a keypad or card reader to enter or exit the area. This only works if exit is granted through a keypad or card reader.
- The next tab is called **Entry Devices**. This is where you will assign Devices that will enter this Access Area.
    - Select from the list on the left.
- The third tab is called **Exit Devices**. Here you will select the Devices that exit this Access Area.
    - Select from the list on the left.
- The last tab is called **Units**. Just like before, select the Units that are in this Access Area.
- Click **Submit** to save your changes.

Reports:

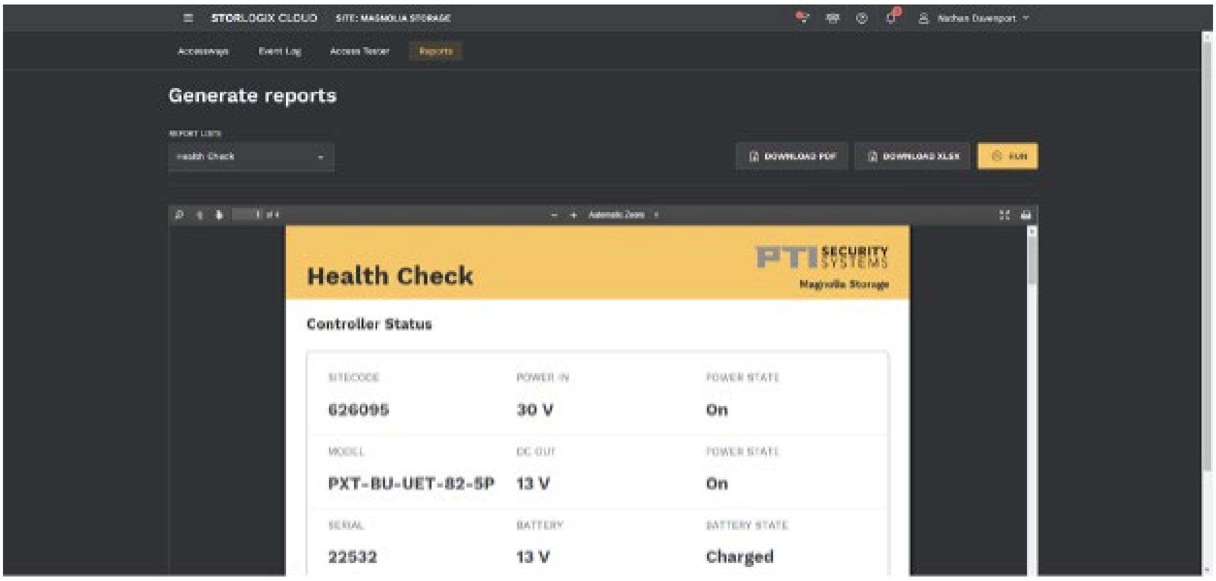
All 40 reports that exist in StorLogix Desktop are now available in StorLogix Cloud. From the Home screen, the Operator can reach the new reporting module with two clicks. Running a new report is as simple as selecting the report from a dropdown and clicking “Run”. These reports are also easy to export and share with others via email. The Reports section is visible in either the Multi-Site mode or Single-Site mode. However, when you’re viewing more than one site at a time, only a subset of the reports are available.

To run a specific report:

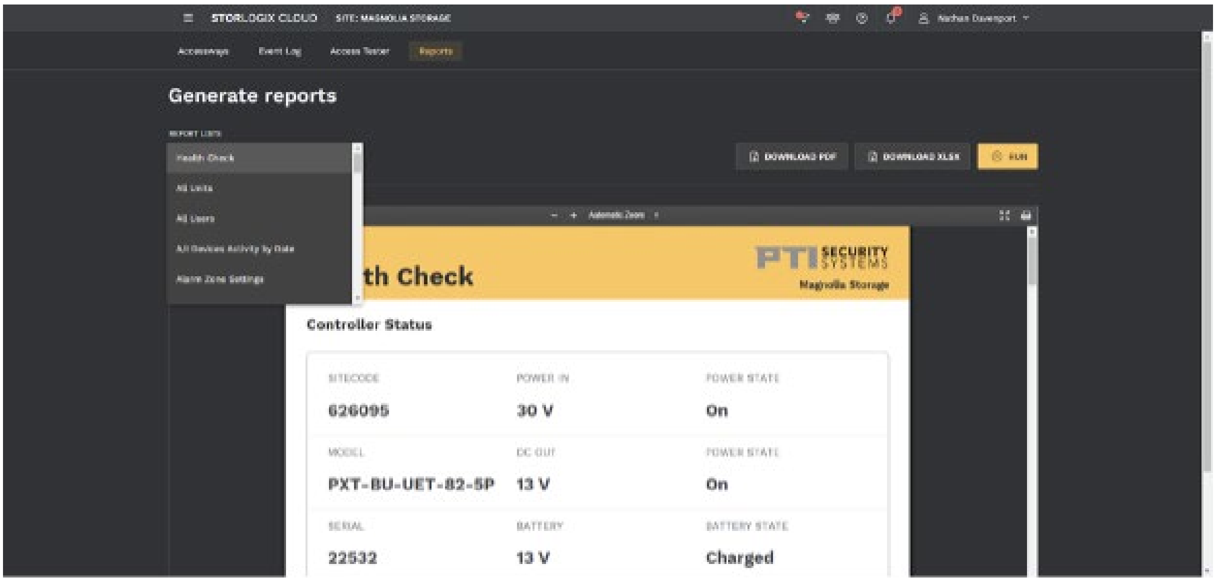
- Select **Tools** > **Reports**.



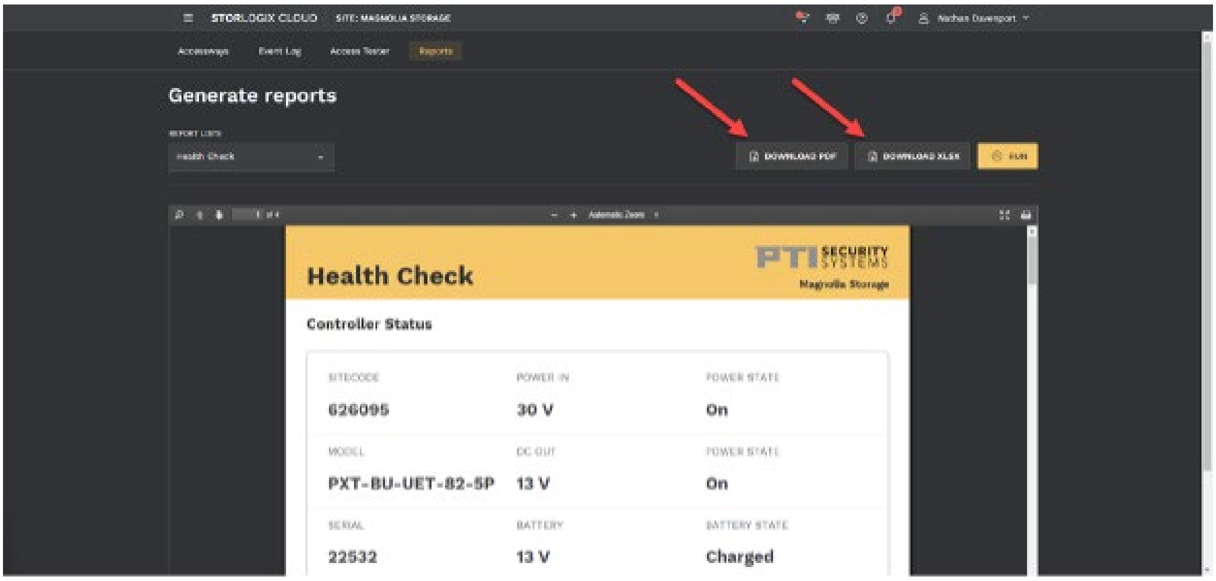
- The **Health Check** report will always display first. This is a combination of multiple reports and provides a quick overview of the site's device status and site activity.



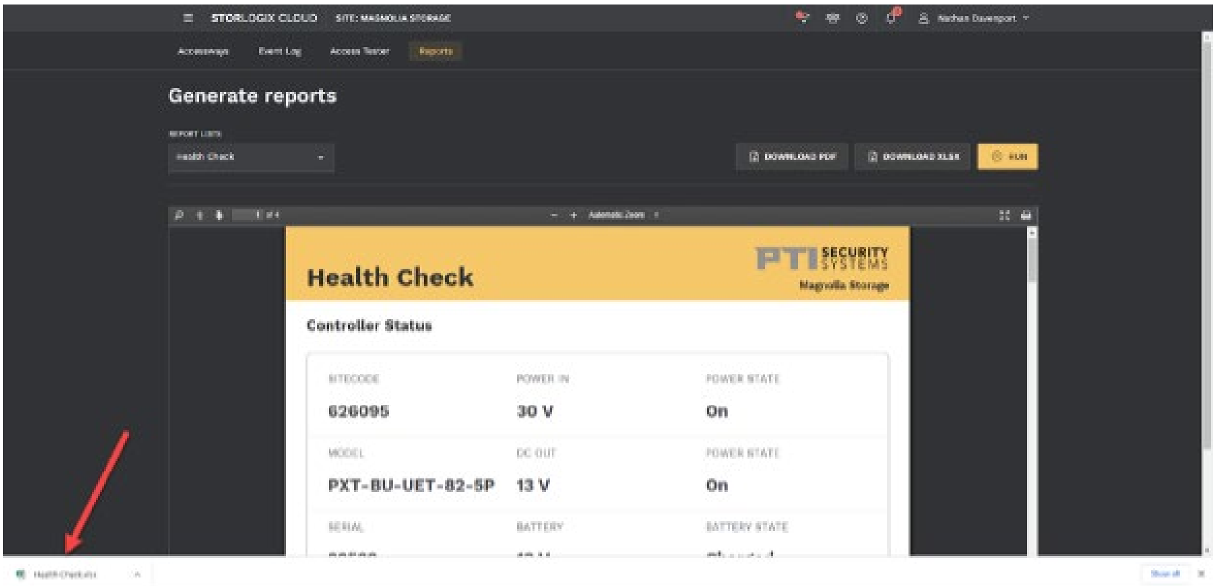
- To select a new report, click on the **Reports List** dropdown and select any one of the 40 available reports.



- To export / download a report, click on the **Download PDF** button or **Download XLSX** located near the top right (red arrows).



- The report will then be available in the bottom left-hand corner of your screen and can be emailed by either saving the document or dragging and dropping it into an open email.

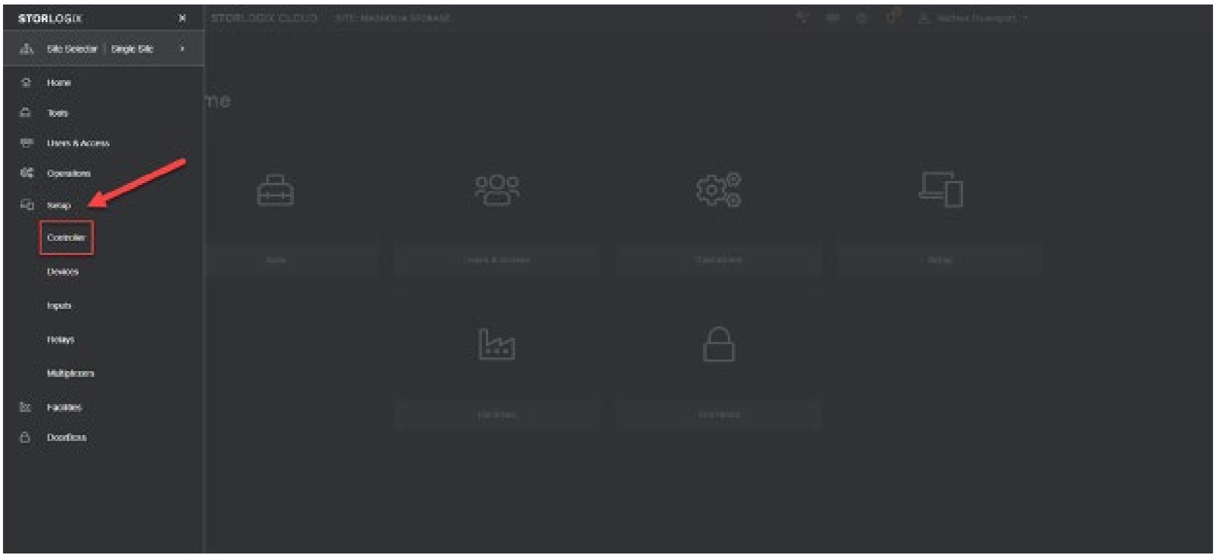


Controller:

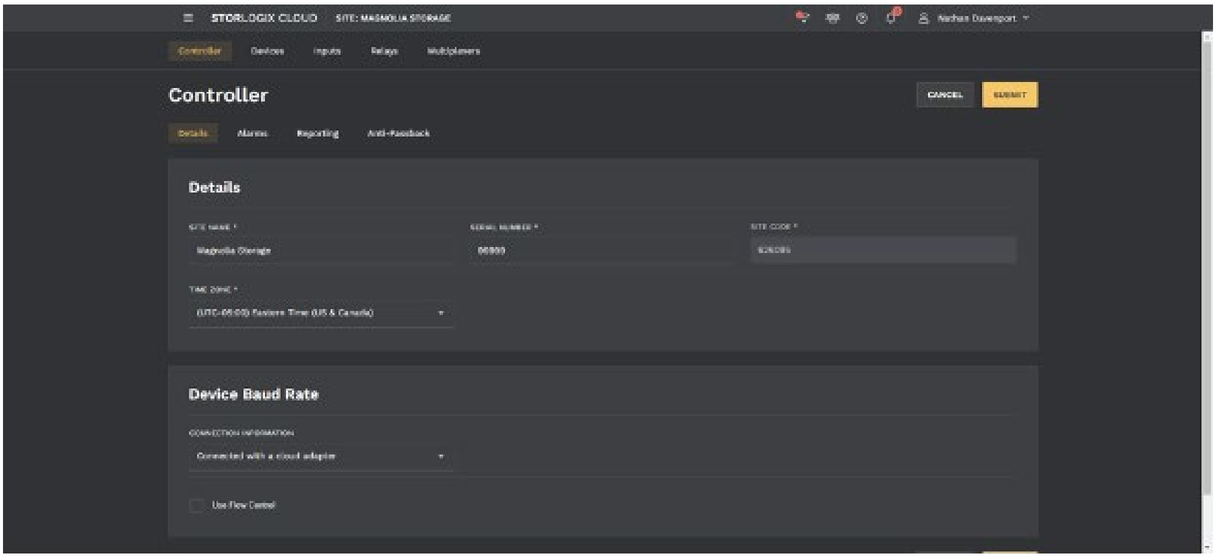
The Controller section provides all the settings specific to your facility's system controller. PTI now produces two controllers. If you're using a Falcon XT controller, then continue reading. If your facility uses PTI's newest controller, the CloudController, then be sure to view the User Guide specific to CloudController sites. The Controller section is only visible in Single-Site mode.

To view Controller:

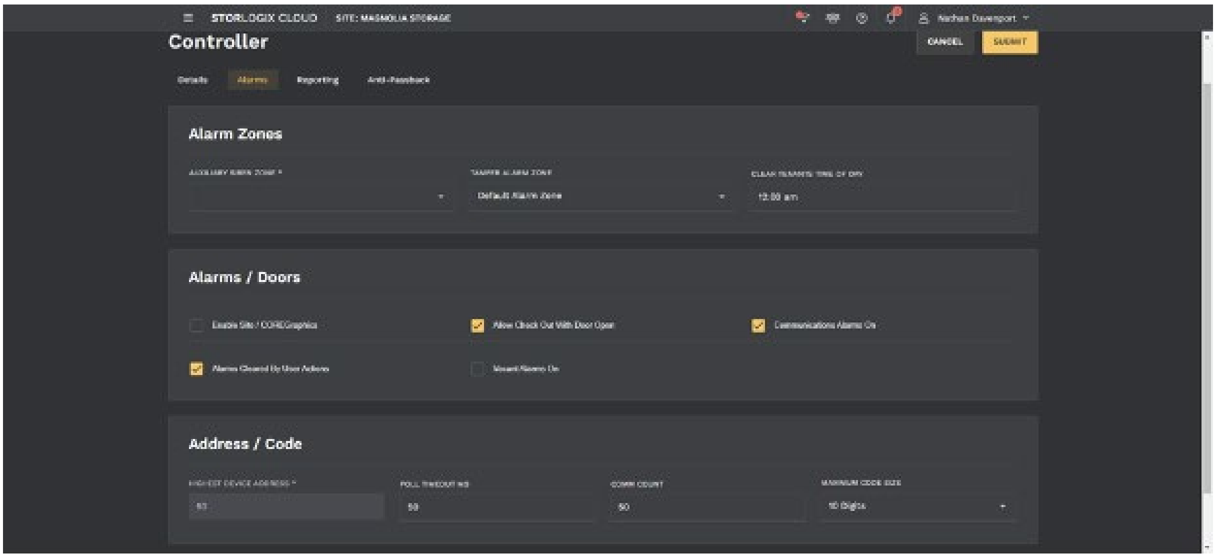
- Select **Setup** > **Controller**.



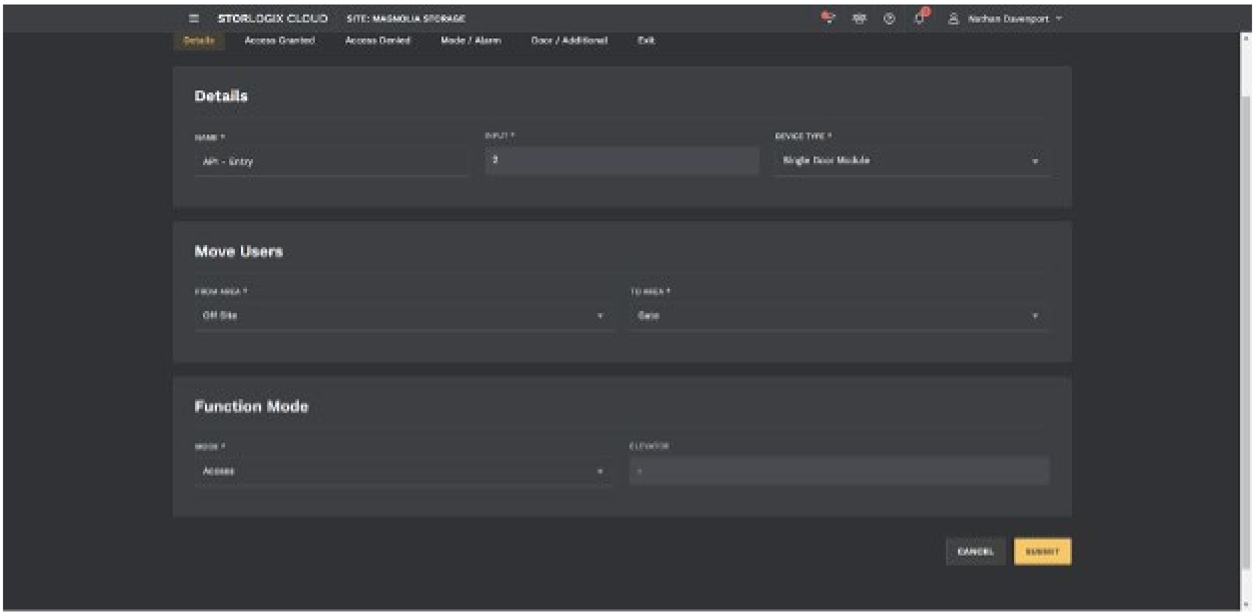
- Here you will land on the Controller **Details**.



- Alarms, Reporting, and Anit-Passback settings round out this section.



Devices:

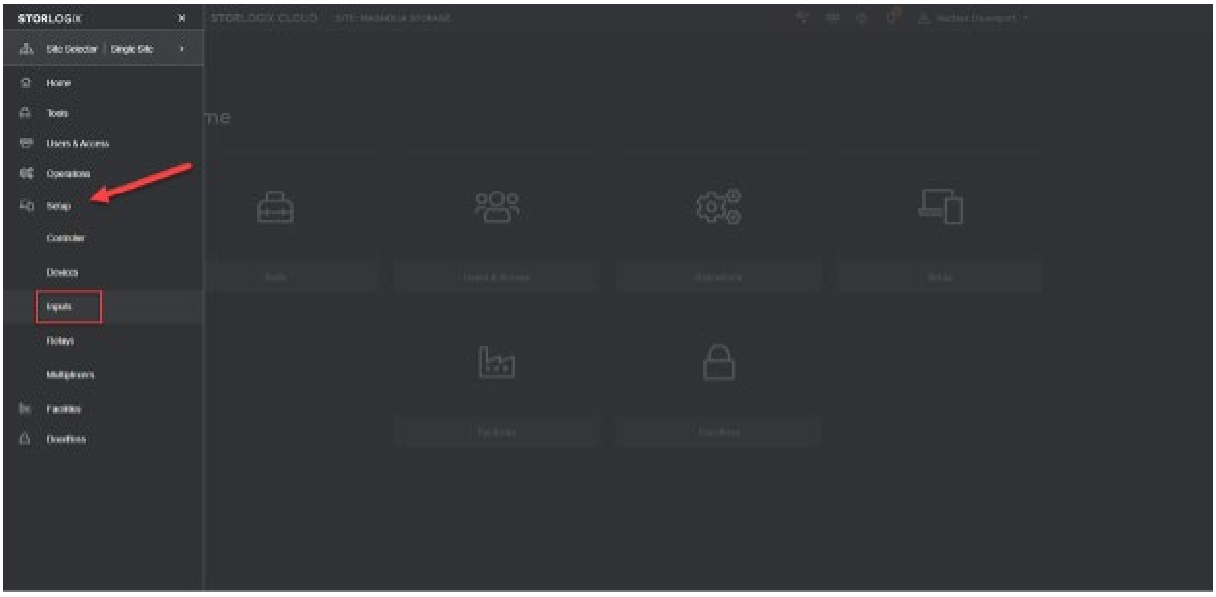


Inputs:

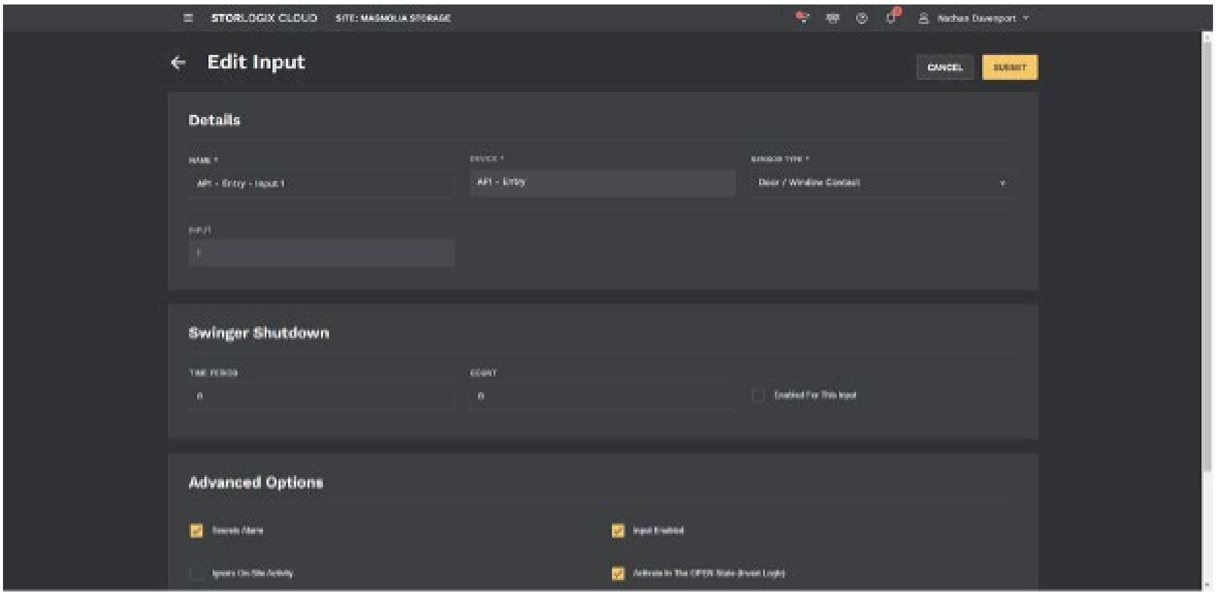
Inputs are connection points in the system that monitor alarm switches such as door switches, motion sensors, glass break sensors, door contacts, tamper switches, photo beams, etc… The Inputs section is only visible in Single-Site mode.

To view Inputs:

- Select **Setup** > **Inputs**.



- StorLogix Cloud is a smart system that dynamically lists the type and number of inputs and relay depending on the device specification.
    - To Edit an Input, click on a row listed.



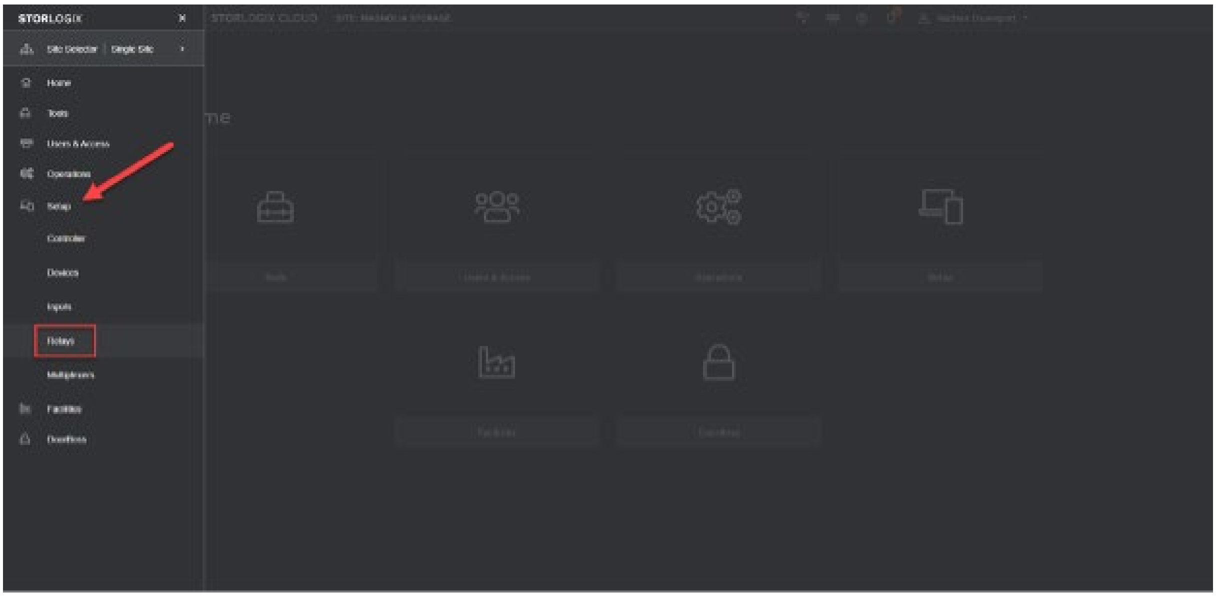
- Swinger Shutdown
    - Rollup doors sometimes shake with traffic vibration or wind due to poor installation, settling of the building, or broken tracks. If the shaking becomes excessive, it can cause the door alarm to sound by moving the magnet too far from the door switch. If this happens often on certain doors, swinger shutdown can be used to remedy the problem. To use the Swinger Shutdown function for a specific switch, click to place a checkmark in the Enabled for this Input box. Set a Swinger Time Period: (min) and a Swinger Count. This is how many door alarms it takes to activate the Swinger Shutdown during a set time. A swinger count of 3 – 5 in 1 to 2 minutes will eliminate most issues.
- Advanced Options
    - Sounds Alarm: When checked, the Input will alert the software when an alarm condition occurs.
    - Input Enabled: When checked, the Input will be active.
    - Ignore On-Site Activity: When checked the door switch will report only one ‘door open’ event when a user is logged into the site and will not report any other activity until after they have logged off the site.
    - Active in the OPEN state (Invert Logic): This can be used if the incorrect switch type was installed (normally closed instead of normally open). Place a checkmark in this box to fix the problem without having to purchase a new switch.
- Click **Submit** to save changes.

Relays:

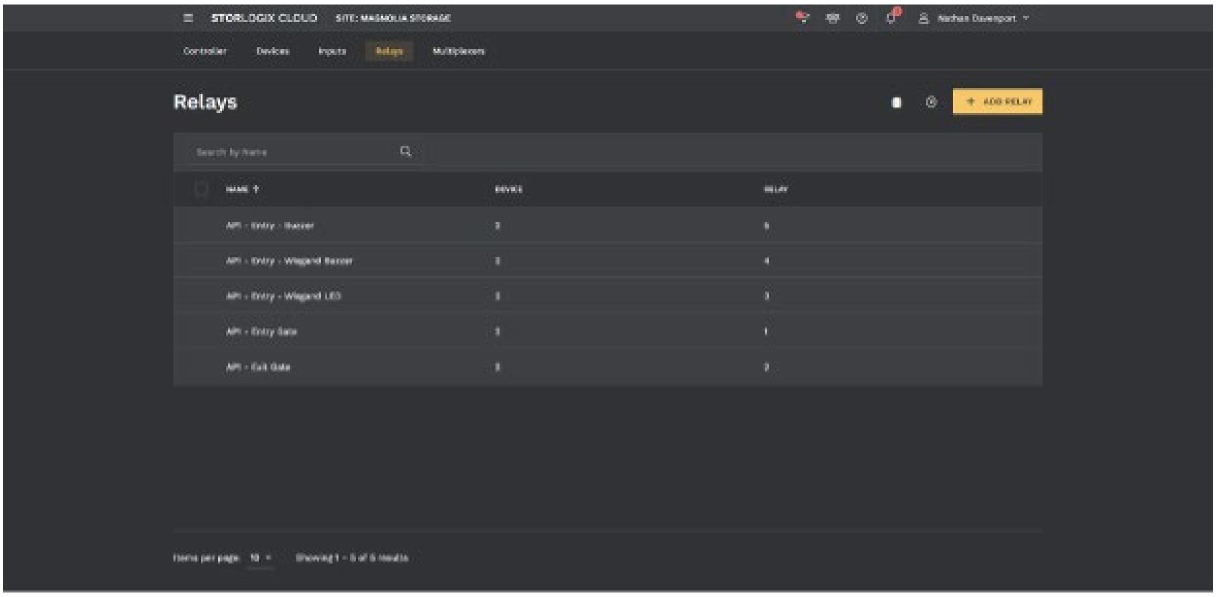
Relays are switches located within a Device that is used to control another device such as a door, gate, siren, light, photobeam, etc. The Inputs section is only visible in Single-Site mode.

To view Relays:

- Select **Setup** > **Relays**.



- StorLogix Cloud is a smart system that dynamically lists the type and number of inputs and relay depending on the device specification. If devices have already been added to the RS-485 network, you will see the correct number and name of each Relay listed here.



- The Details are explained below:
    - Name
    - Hold Open During Time Schedule is used to trigger the relay during a specific time schedule. This could be used by a site that wants the gate to remain open during business hours or to hold lights on at night.
    - Enter the Activate Time (h:m:s). This is the time in hours:minutes:seconds that the relay will hold when triggered. Generally, relays controlling gates should be set for 2 seconds as the gate operator then takes over the speed of the gate opening and the time that it remains open. Door strike relays are usually held for 7 – 10 seconds or longer to allow the customer time to open the door manually after entering their code. Automatic door openers and doors that are distant from the keypad may require longer settings.

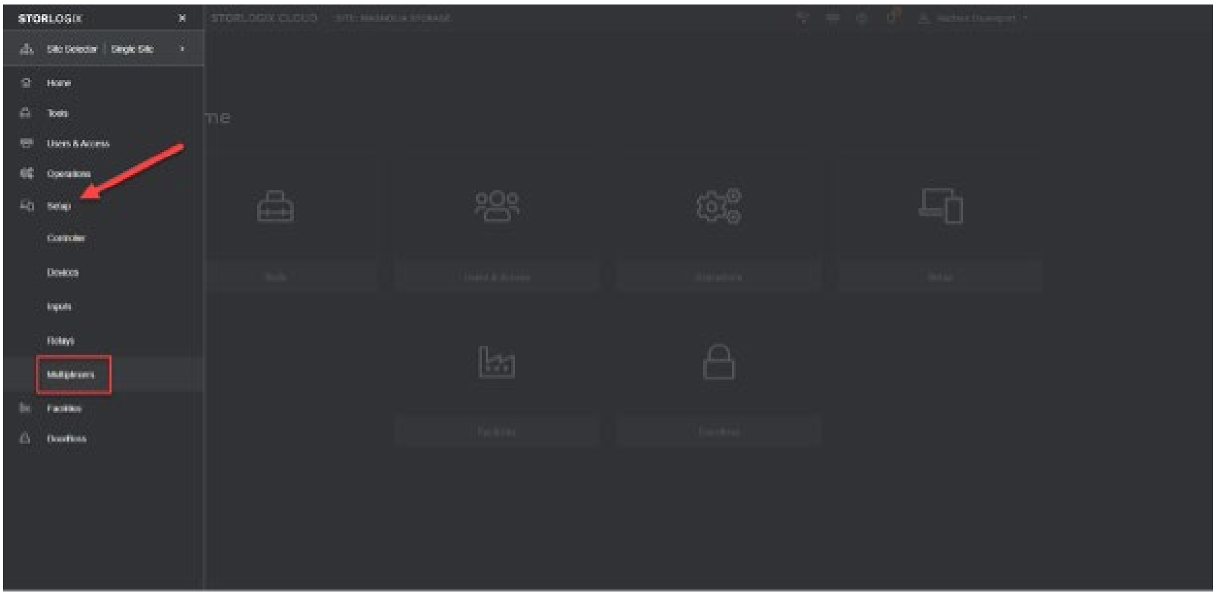
    - Check the “Allow Manual Trigger in Open Accessways” to remotely open or close doors and gates on the property. These will show up in the Accessways section (Tools > Accessways) if the relay is checked.
    - Turn OFF to Activate (Invert Logic) is used to reverse the relay operation. This can be used if the relay was incorrectly wired backward and is opening the gate when it should be closing. Place a checkmark in this box to fix the problem without having to rewire the relay.
    - The Relay Enabled box is checked by default. If the checkmark is removed from this box, then the relay will not function at all.
    - Physical or Virtual: Physical relays are the existing relays in Devices. Virtual Relays are on/off or yes/no actions in the software that allow certain legacy LogixScript functions to work.
    - Repeat Action when Triggered. This is used to cause the relay trigger to be repeated. This could be used to make a light blink, to make a buzzer sound several times, etc. Number of times to repeat: Set this number for how many times the relay will trigger after the initial instance. Off time between repeats (S): This is the number of seconds/tenths of seconds between each of the repeating instances.

Multiplexers:

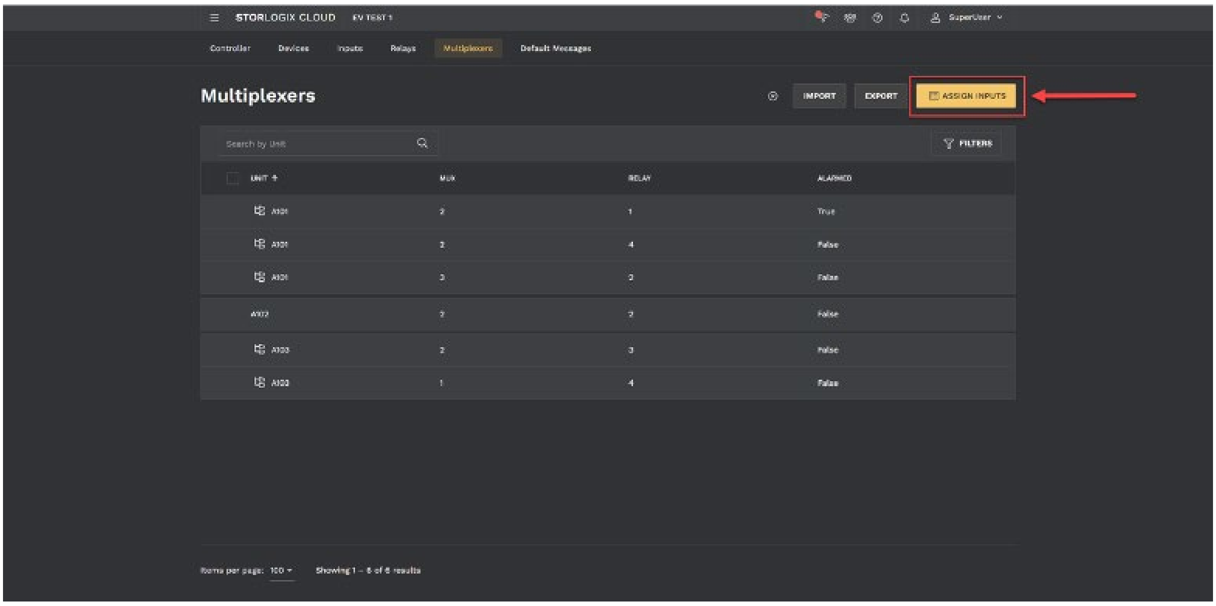
The Door Alarms section links any given input with a physical self-storage unit. Once the input-unit link is created, self-storage units can be armed or disarmed based on whether a tenant is onsite. Traditionally, door sensor inputs are linked to self-storage units to detect if an armed unit has been accessed without permission. The Multiplexer section is only visible in Single-Site mode.

To view Multiplexers:

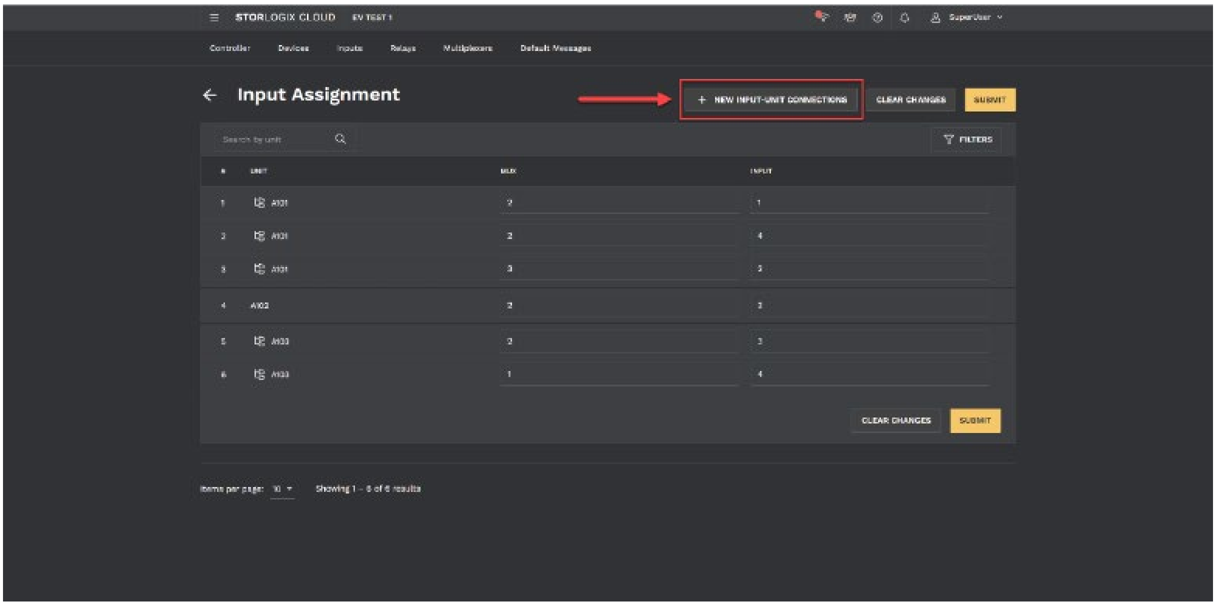
- Select **Setup** > **Multiplexers**.



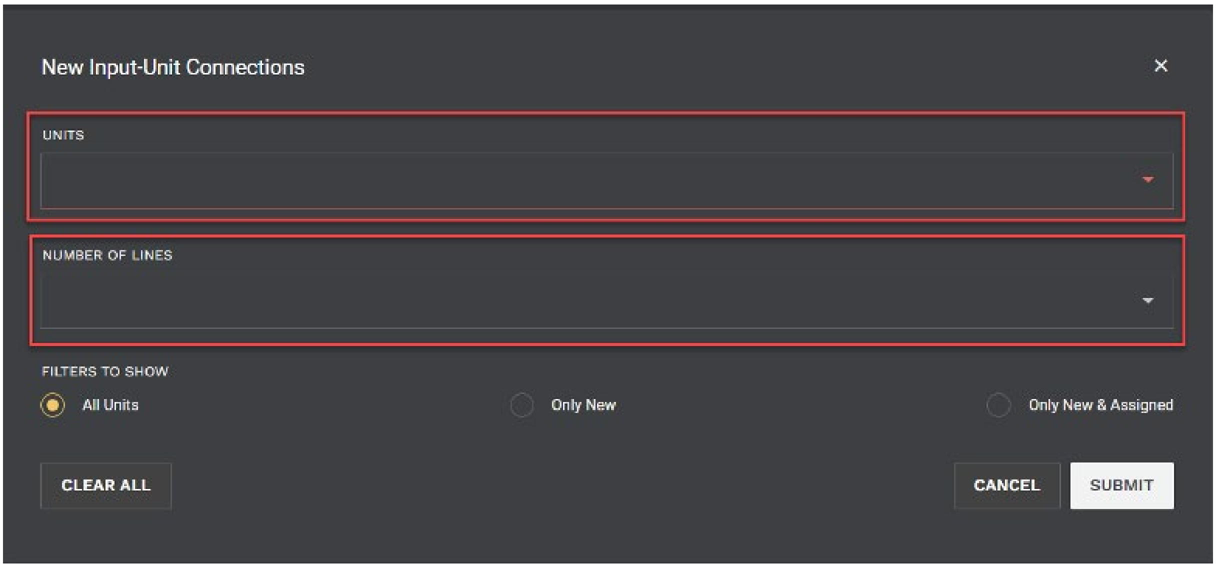
- Create a New Input-Unit Connection(s)
    - To create a link between an input and a unit, select the ‘Assign Inputs’ button.



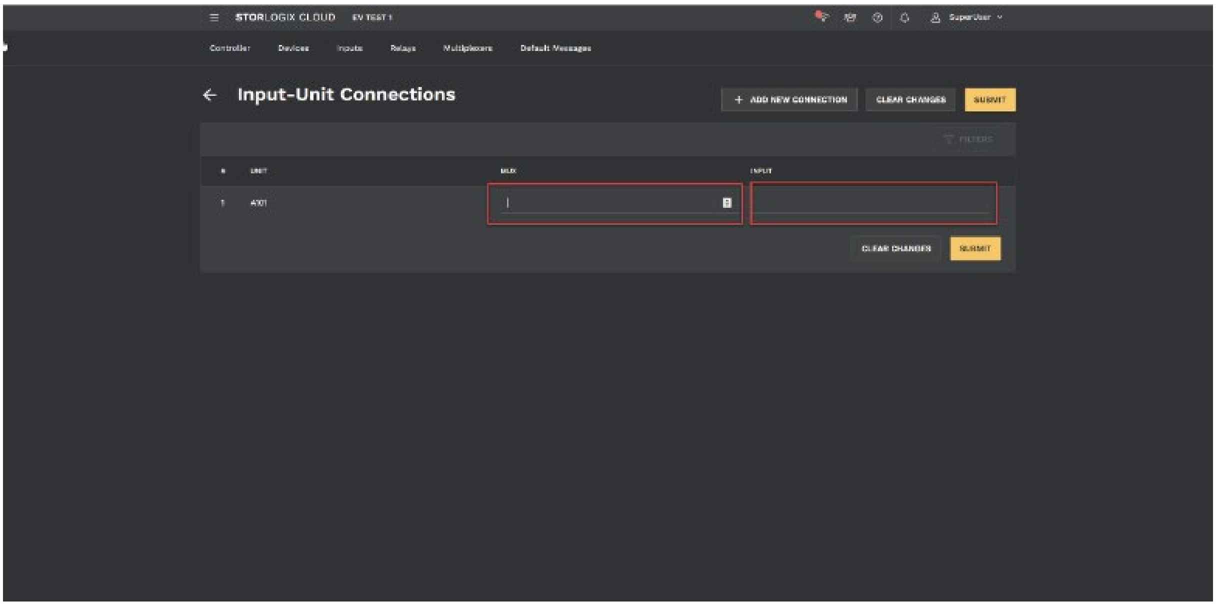
- Then, select the ‘New Input-Unit Connection’ button.



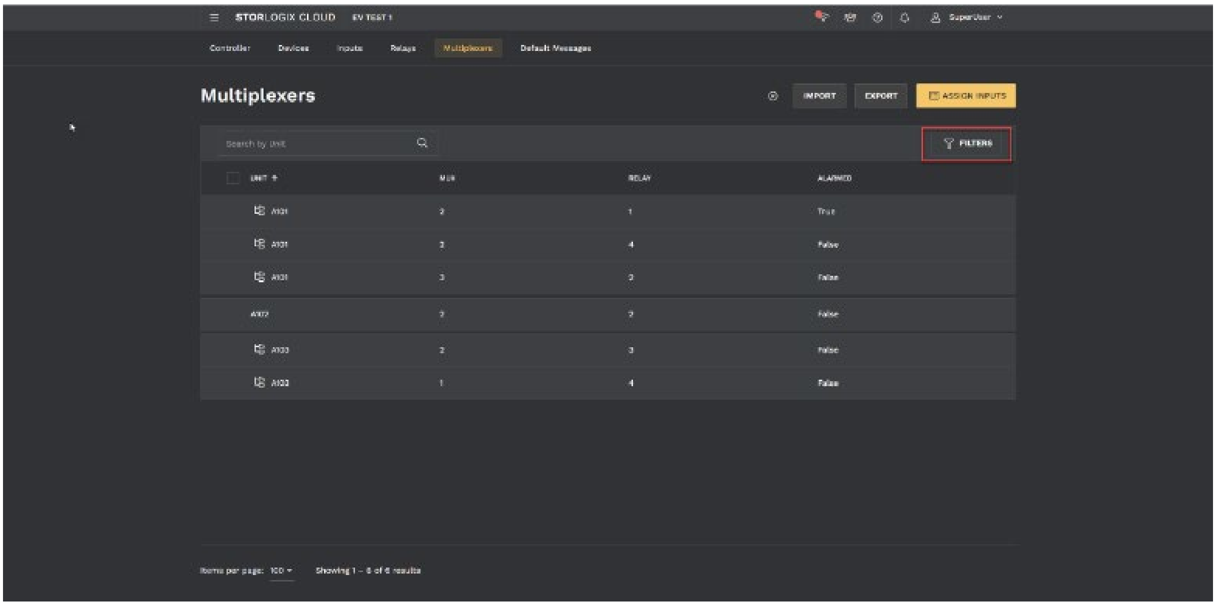
- Use the ‘Units’ drop-down menu to select the units fitted with door sensor hardware. Then, select the number of connections to create per unit and select ‘submit’.



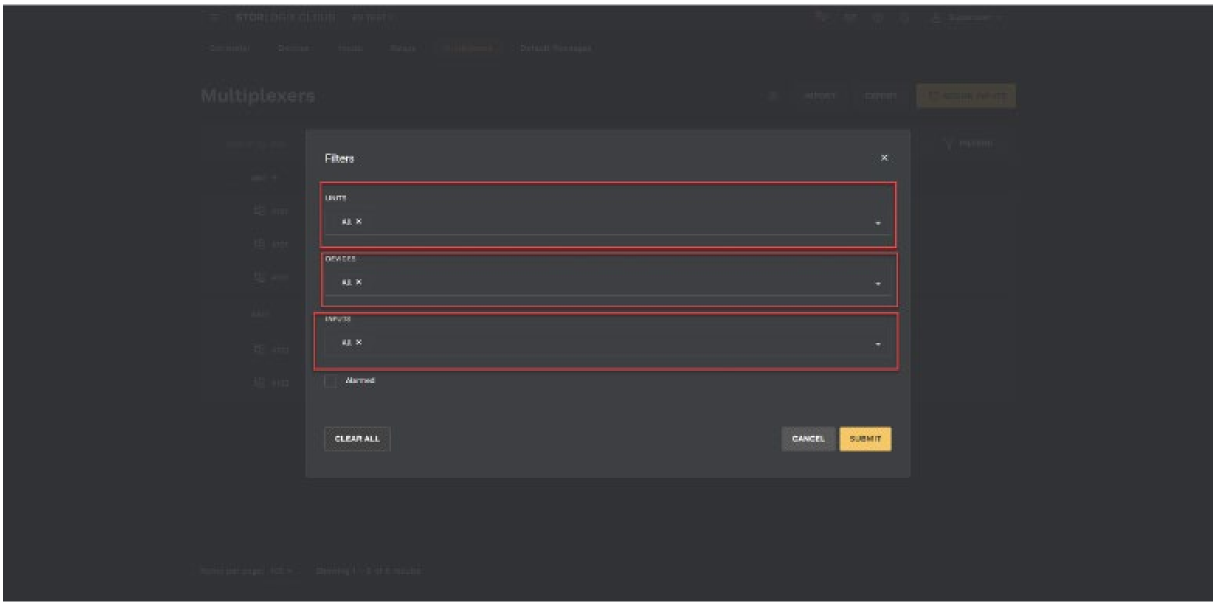
- Once connections are created, you'll need to define the device address and input number associated with your unit. Remember, you'll need to select submit for changes to be saved.



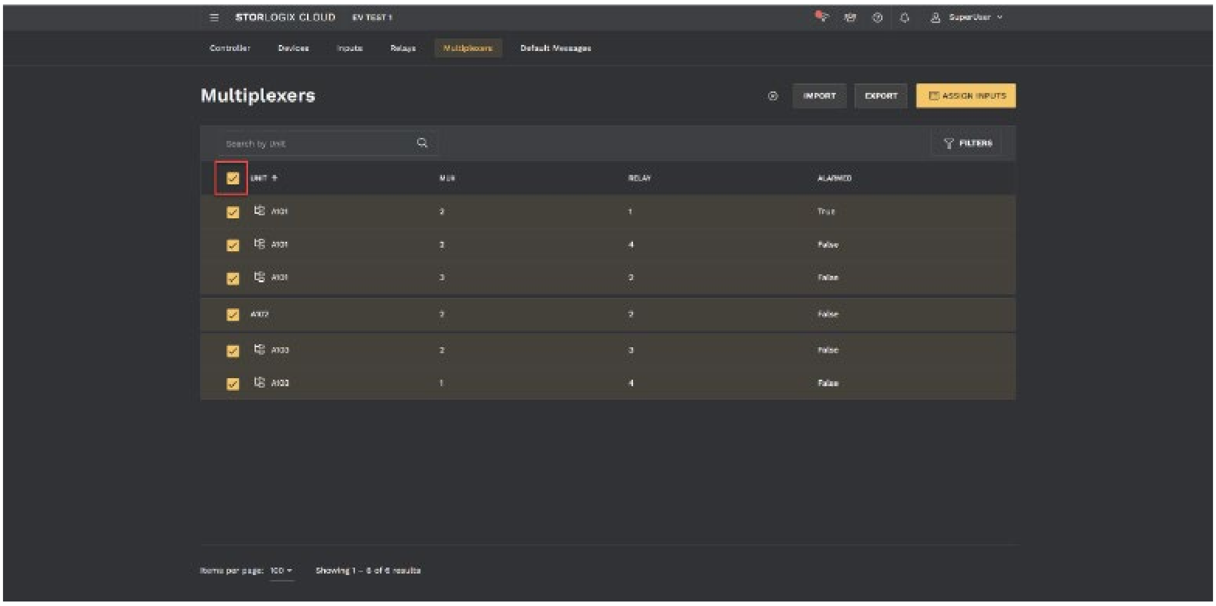
- Delete Existing Input-Unit Connection(s)
    - To remove an input-unit connection, simply find the desired connection(s) using the 'filters' function.



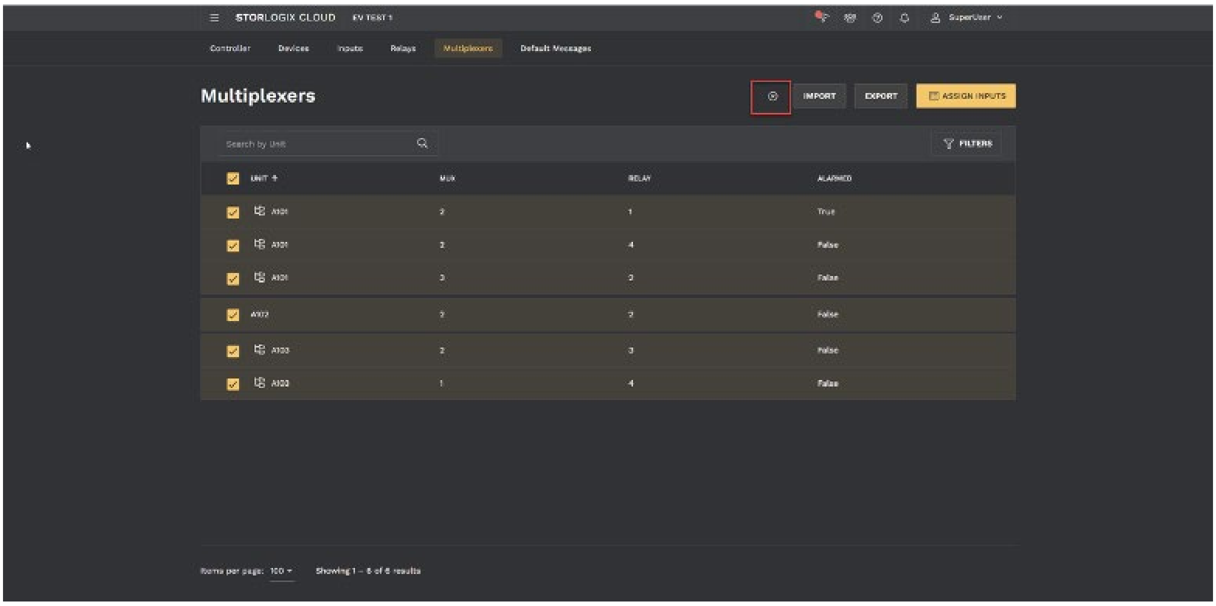
- Then, select the appropriate unit, devices, and/or inputs in the filters menu:



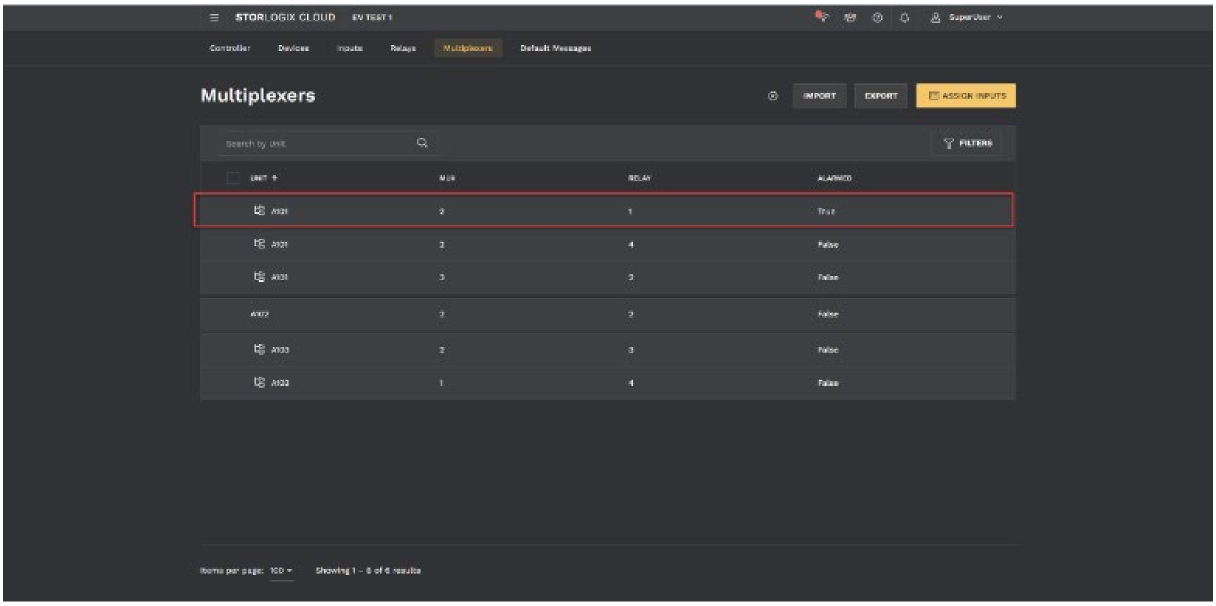
- Then, select the checkbox on the top-left. This will select all the connections that fit the filter criteria defined in the previous step.
    - Note: As an alternative, you may also select the individual connection.



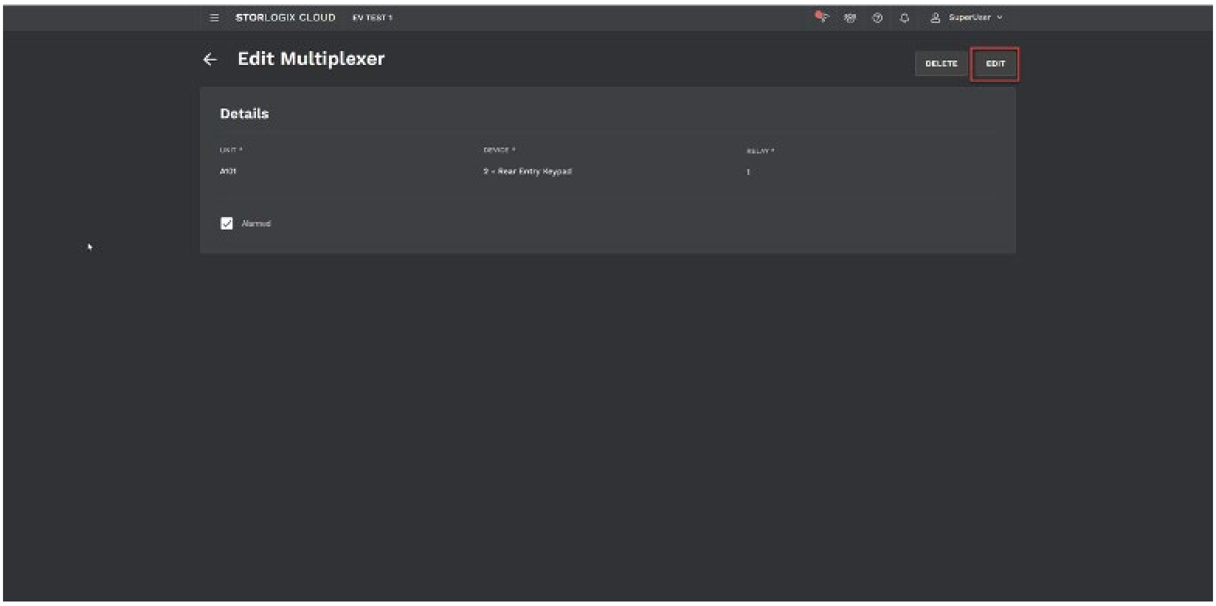
- Lastly, select the delete button to finalize your changes.



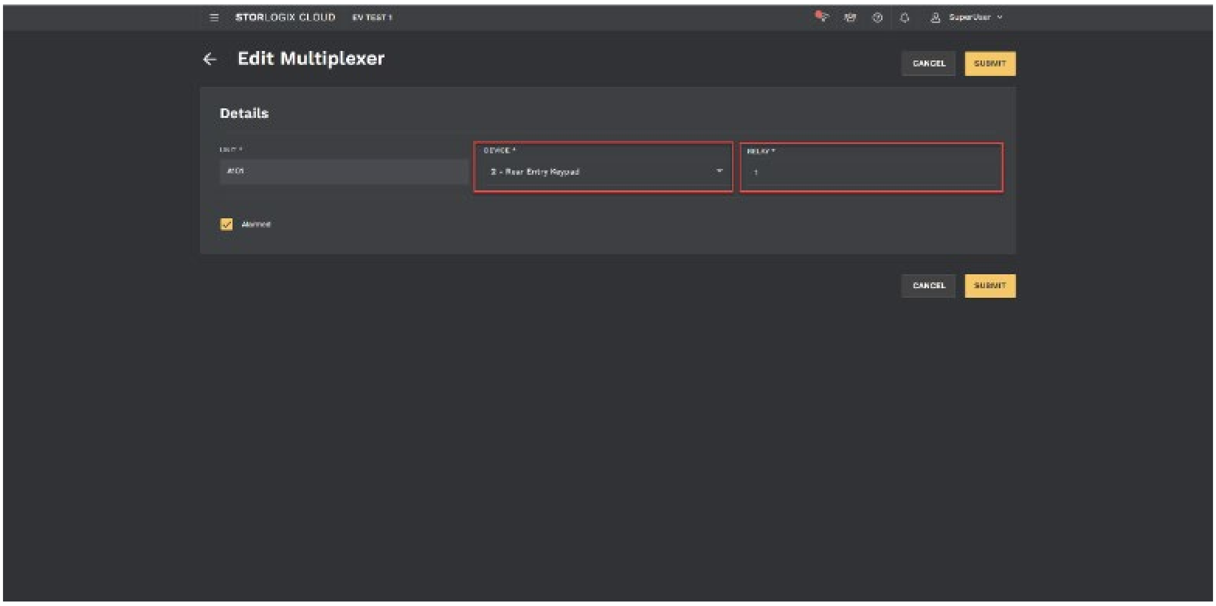
- Edit Existing Input-Unit Connection
    - To edit an existing input unit connection, left-click on the connection entry:
        - Hint: Use filters to find the connection.



- Select the ‘edit’ button.



- Make any change to your device or input designated in the selected connection and select to submit to save your changes.


STORLOGIX CLOUD
SuperUser
Edit Multiplexer
CANCEL
SUBMIT
Details
DEVICE *
2 - Rear Entry Keypad
RELAY *
1
CANCEL
SUBMIT