STORLOGIX CLOUD
USER'S MANUAL

2023

PTI SECURITY SYSTEMS

STORLOGIXCLOUD

USERS MANUAL

TABLE OF CONTENTS

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.

CloudController

The latest version of StorLogix Cloud will work with both the legacy Falcon XT and the new CloudController. The CloudController unlocks several new features and is the go-forward system controller for PTI. However, there are tens of thousands of Falcon XTs deployed all over the world, so even if you're not ready to upgrade to the latest controller, your operation will still benefit from this latest release of StorLogix Cloud.
To Install the CloudController, please review the CloudController Install Guide. This installation will likely need to be completed by a Preferred Partner that is licensed to install PTI access control systems. Once the CloudController is fully installed and your PTI hardware is installed and configured, the PTI Tech Support team will take over the installation of cloud software.

Installation & Walkthrough

Your PTI Installer can perform the installation remotely. In many cases, they will 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

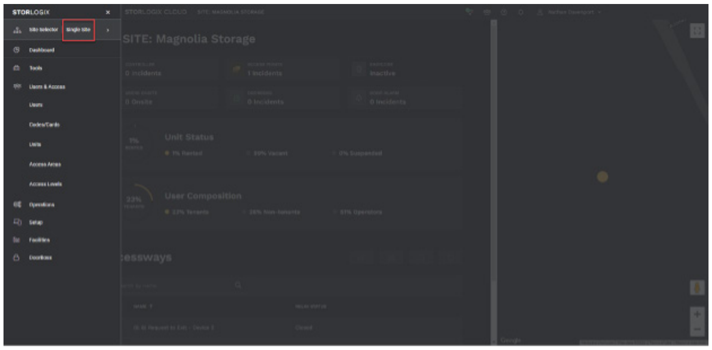
Following the Walkthrough, the PTI Installer will distribute new login credentials to the site's operators. For multi-site operations, the Installer will also set up Site Hierarchy based on your organization's needs. This feature allows for site segmentation and ensures that only Operators can view and 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 Operators can be reassigned at any time by an Administrator on your team. See the Operators section for more details.

Non StorLogix Desktop Site

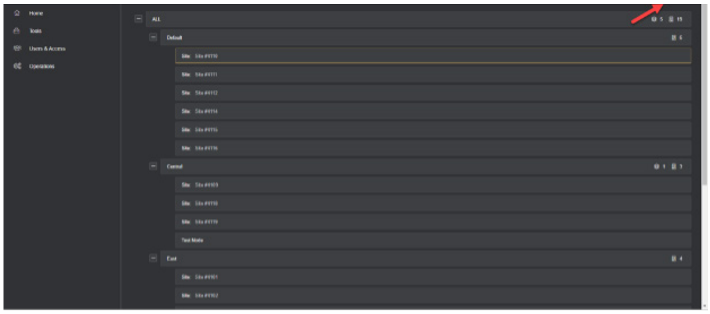
With the latest updates, Operators and Installers no longer need to install StorLogix Desktop before StorLogix Cloud. You can now configure a site directly in the cloud. The following steps detail this configuration process.

Enter the login credentials you were provided from PTI:

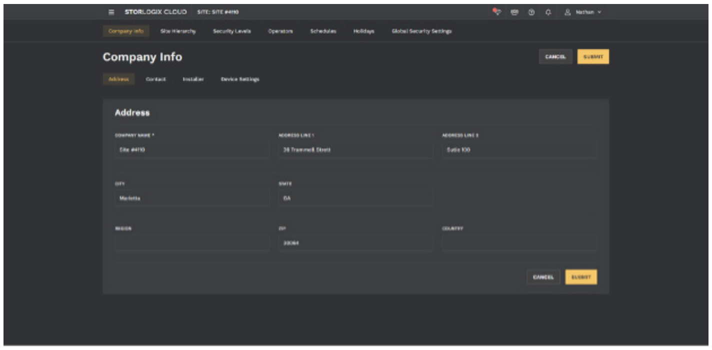
Click Login, and then read and agree to the Terms of Service:



After signing in be sure to be in Single-Site mode. 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 found on the CloudController

Property Management Software Integrations

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.
- Cloud to Cloud API integration or the Bridge App

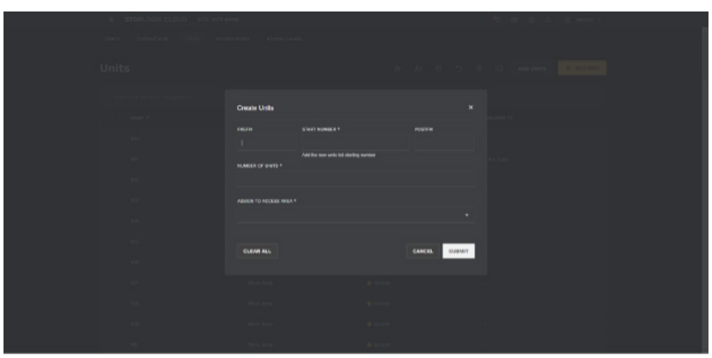
There are currently 9 Cloud to Cloud API Integrations complete (List Below)
- CubeSmart's HIVE
- Domico Cloud
- DoorSwap
- Hummingbird
- Open Unit
- Self-Storage Manager (SSM 2.0)
- Syrasoft
- Yardi Breeze
- Yardi Centershift

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.

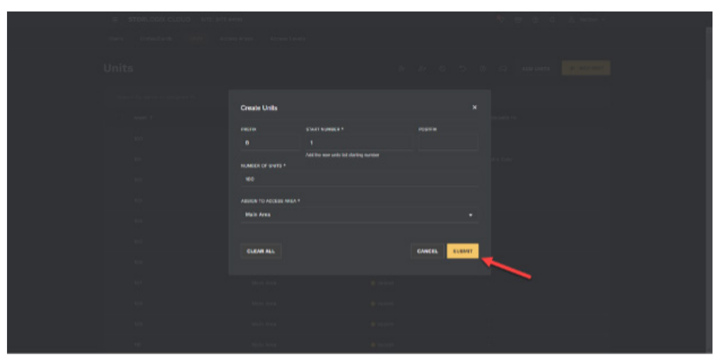
If you're not using one of the PMS groups listed above, then utilize our BridgeApp.
- See the BridgeApp instructions below to complete the connection. These instructions can be found in the BridgeApp Installation section of this User Guide.

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.



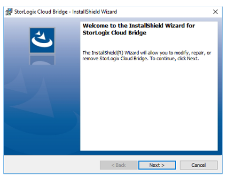
Be sure to set the starting number, and number of sequential units you'd like to add at once



After assigning to an Access Area, then hit Submit.

Bridge App

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 does not 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.

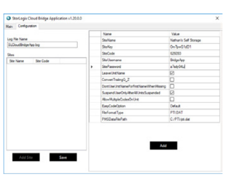


To install the BridgeApp, click the link provided below. Then, click **Next** to complete the installation:

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

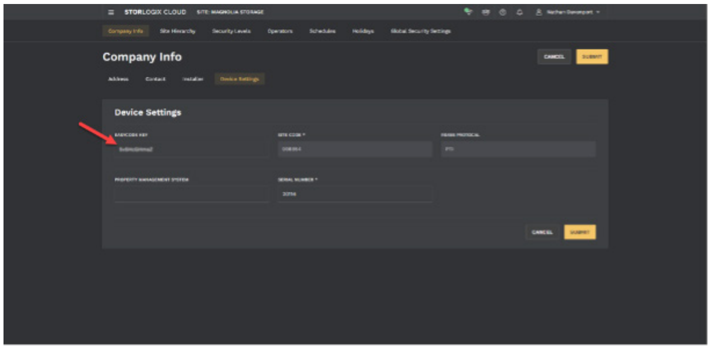
After the installation is complete, open the new desktop shortcut called SLCBridgeClient.

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.

Bridge App



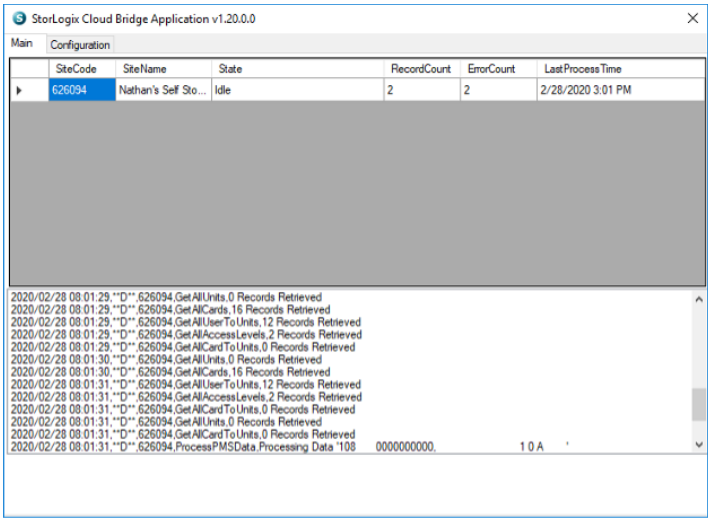
Now, you will need to add the requested information that's listed below:

- **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.

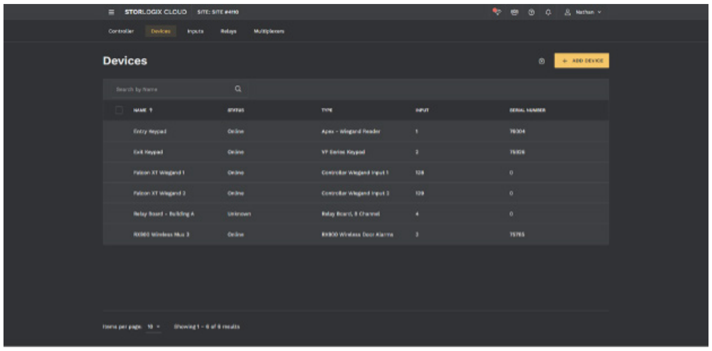
- **FileFormatType** – The 2 standard file formats used in this process are PTI.DAT and UPDATE.DAT.
  - Enter the one that applies.
- **PMSDataFilePath** – Specify the location of the flat file.
  - Click Add and then Save to complete the configuration.



Now select the Main tab to view the status of the BridgeApp.

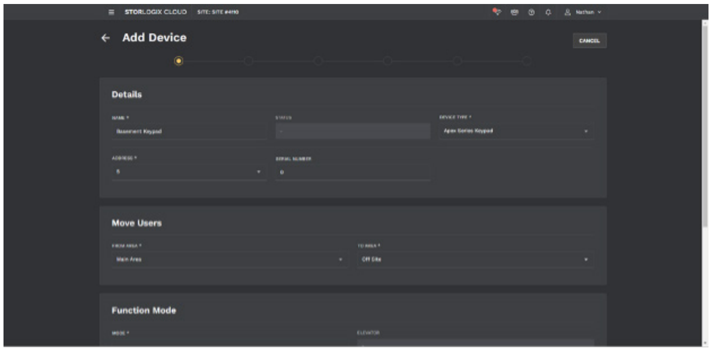
It's important to note that the user can Exit the Bridge App, and the service will continue to run in the background.

Bridge App



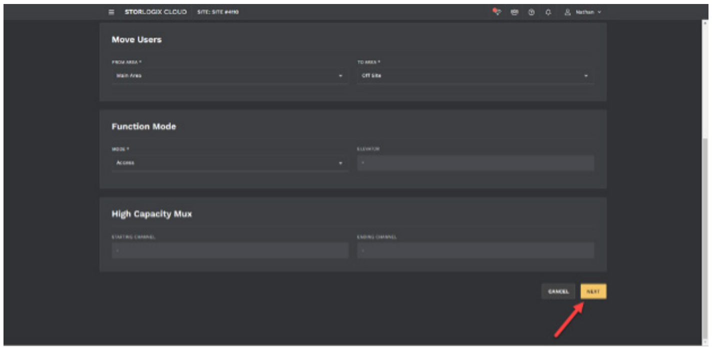
The next step in configuration is to setup Devices which include Access Points, and other peripherals.

Click **Setup > Devices**.

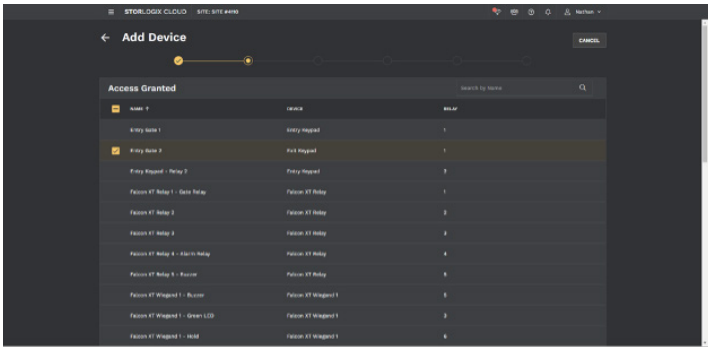


Click a row to edit a Device or select Add Device if you need to set one up from scratch.

If you have connected all the hardware, you will likely see the Devices self-discovered in the table.

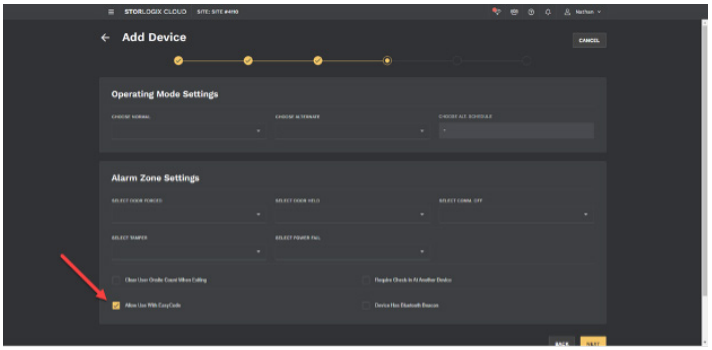


Fill out the required fields indicated by * then click **Next**.



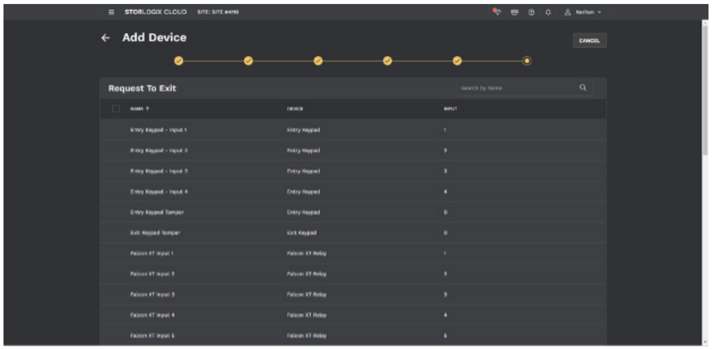
Now, select the relay to fire for a Granted Access Then repeat the action for a Denied Access event (This is OPTIONAL).

Bridge App

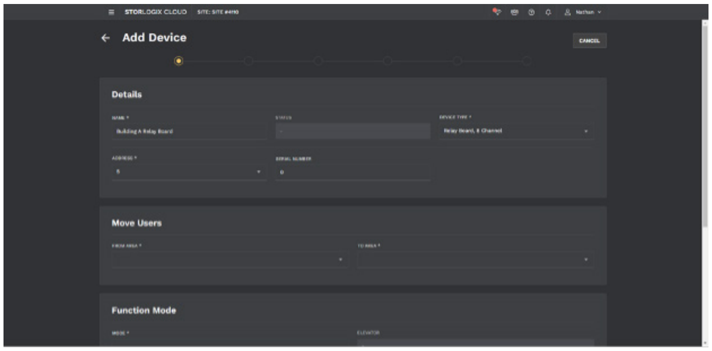


Next, are 2 optional sections that include Operating Mode Settings, Alarm Zone Settings, and Extended Door Controls.

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.

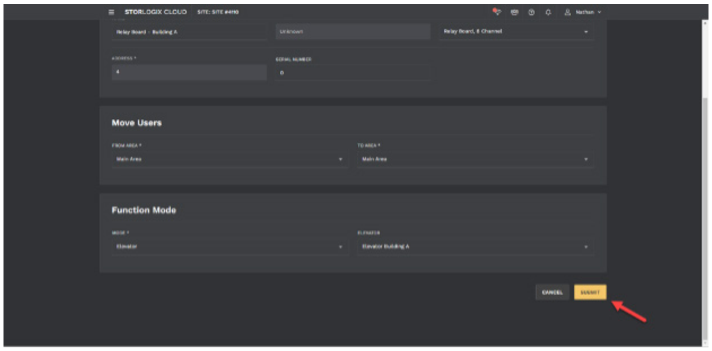


Finally, select an input for a Request To Exit button if it applies (This step is OPTIONAL). Then hit **Submit**.



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

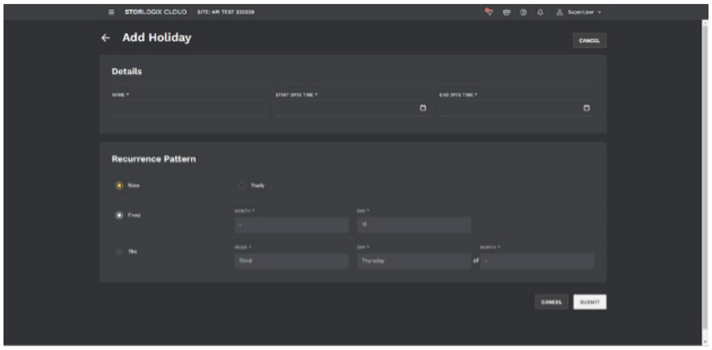
- Click **Setup > Devices > Add Device** or click the row if you see the specific Access Point already in the list.
- Fill out the required fields including to be sure to select the Access Point from the device type list that will be controlling the elevator.



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

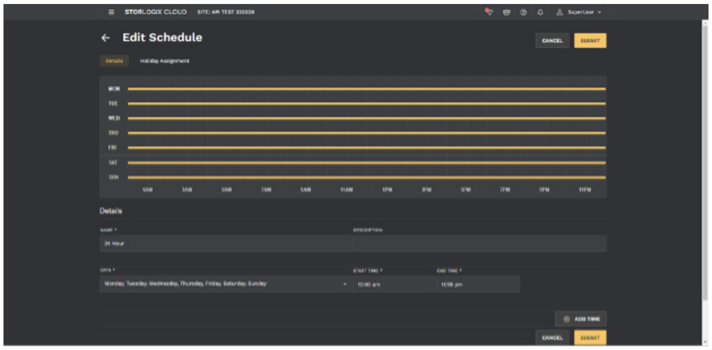
Go all the way to the last required step and finally, click **Submit**.

Bridge App



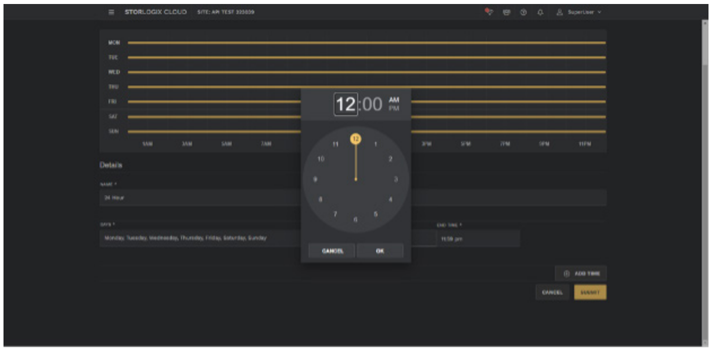
Next add Holidays found in Operations > Holidays > Add Holiday. This is an OPTIONAL step.

Click **Submit** once complete or skip altogether.

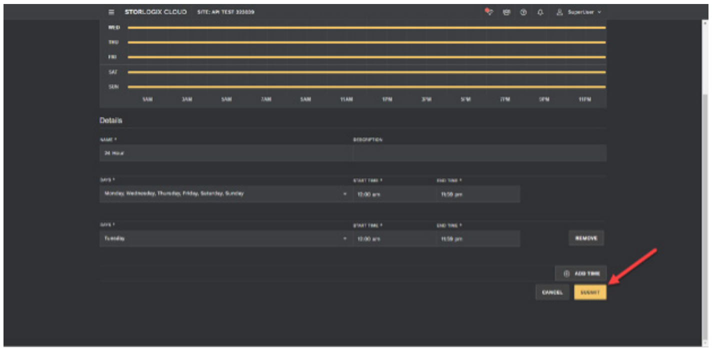


After filling out the Holidays go to Schedules and create at least one Schedule before moving to the next section.

- **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.

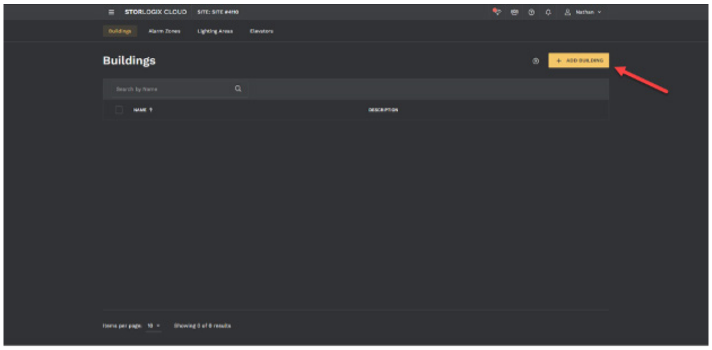


Use the dropdowns to adjust the days of the week. Click the **Start Time** and **End Time** fields to drag the hour hand on the clock to the intended times.



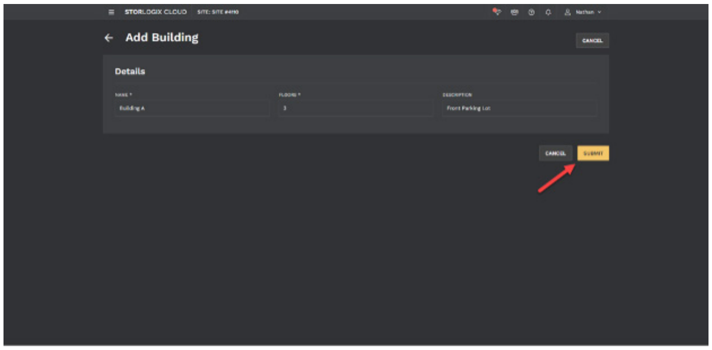
Finally, to add another unique time to the Schedule, click the **Add Time** button.
Hit **Submit** to save the Schedule.

Bridge App

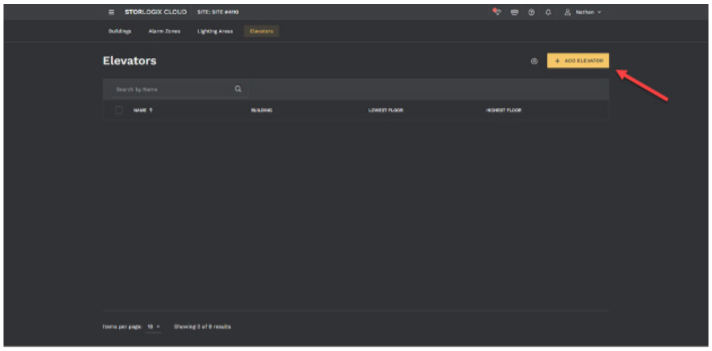


Next go to **Facilities > Buildings > Add Buildings** and set up the buildings that will be on the property.

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.

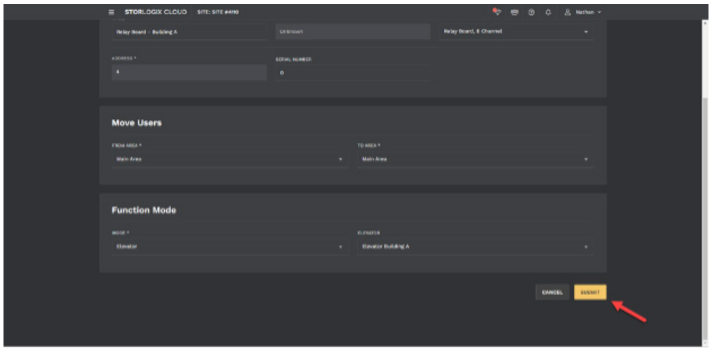


Fill out the required fields, Name and Floors (see screenshot), and then click **Submit**.

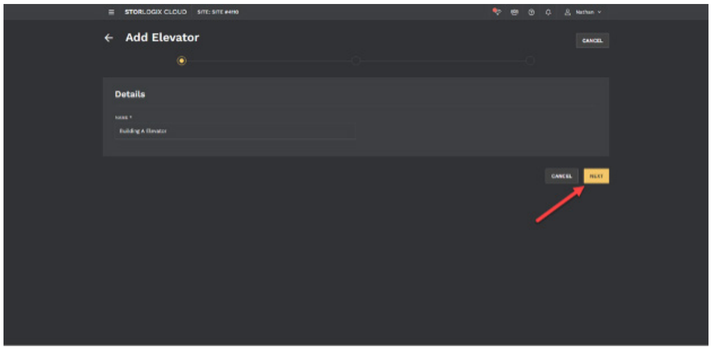


Now it is time to configure the Elevators.

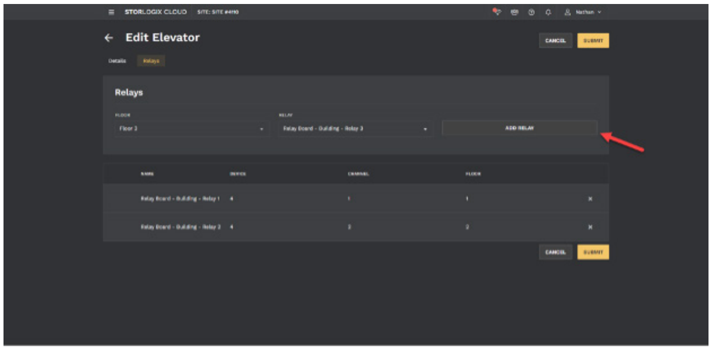
Click Facilities > Elevators > Add Elevator.



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

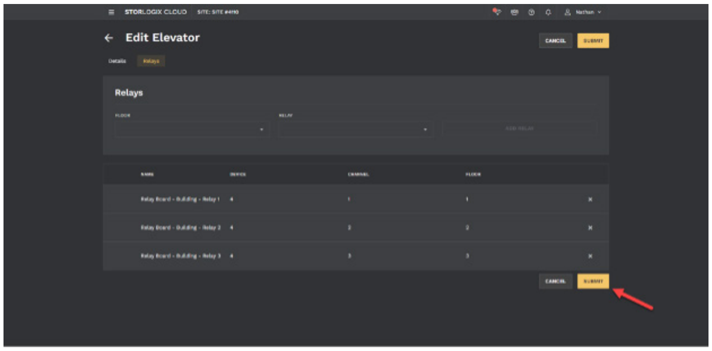


Select the Building from the drop down. Then set the lowest floor (in this case 1), and the highest floor (in this case 3). NOTE: the lowest and highest floor should detail the lowest and highest floors you plan to use the for Elevator Controls. Then click **Next**.

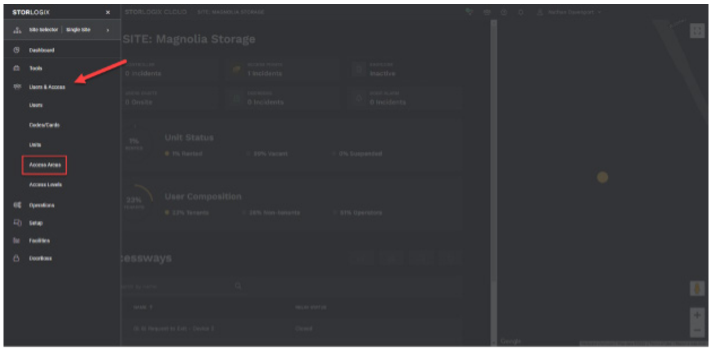


Next, select the relays that will control each floor.

- First select the Floor from the list. Then the Relay.
- After the assignment is correct, then click **Add Relay**



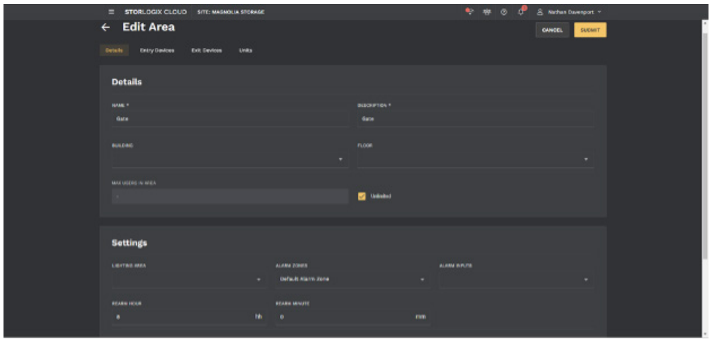
After matching all floors to the needed relays, click **Submit**.



Next you will need to setup Access Areas.

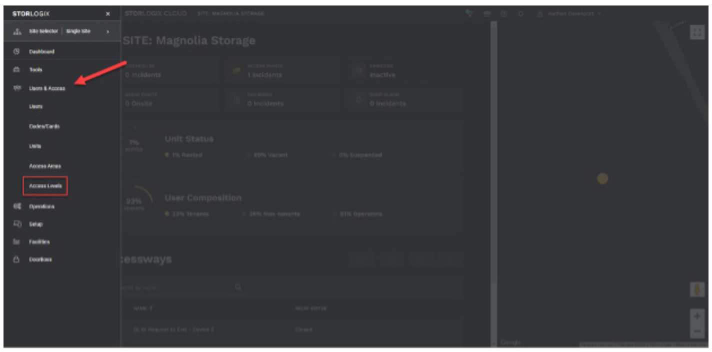
Click Users & Access > Access Areas > Add Area (or edit an existing).

Bridge App



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.

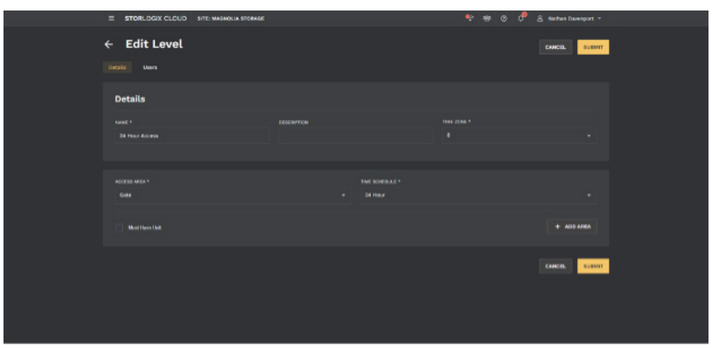


In the Details tab, you can edit the name and provide a description.
Additionally, if this Access Area is inside a specific Building, select the Building.

- 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.



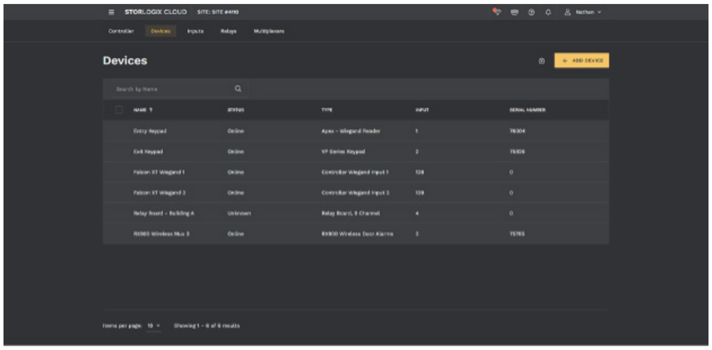
Next complete the setup of Access Levels. Access Levels is a combination of Access Areas and Schedules.

- 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).

Setting Up Devices & Access Points



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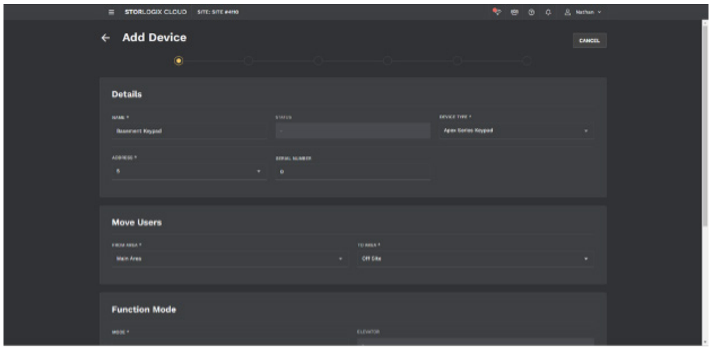
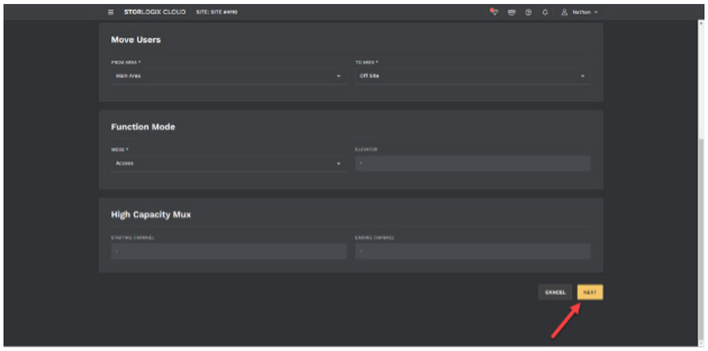
Click Setup > Devices.





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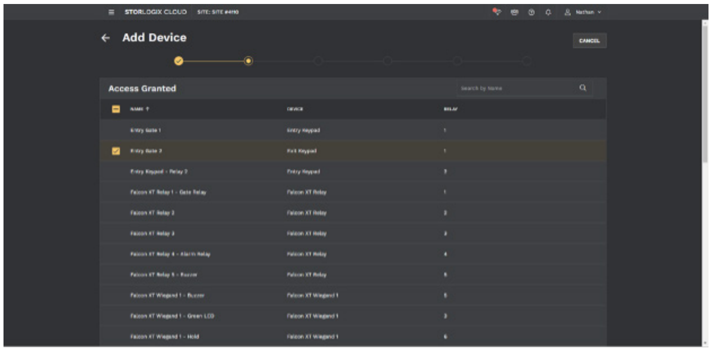

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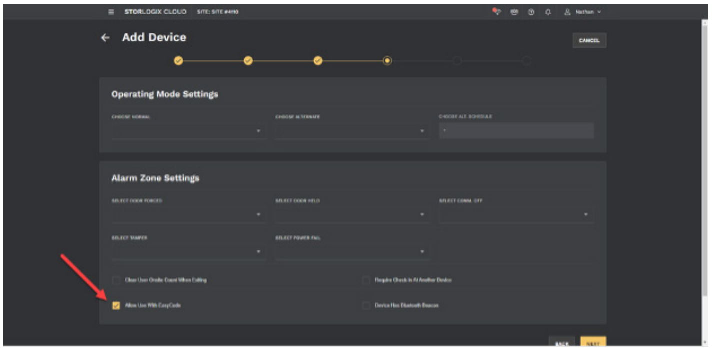
Setting Up Devices & Access Points



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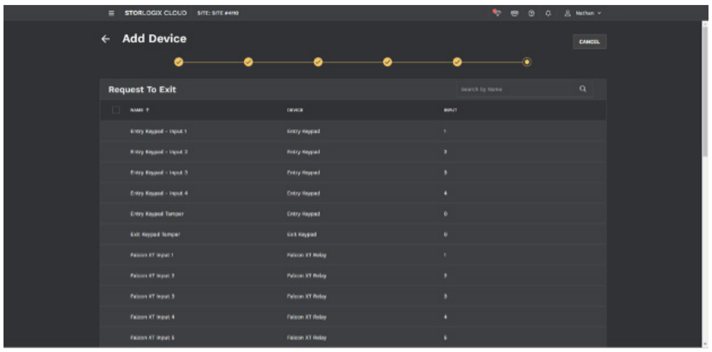
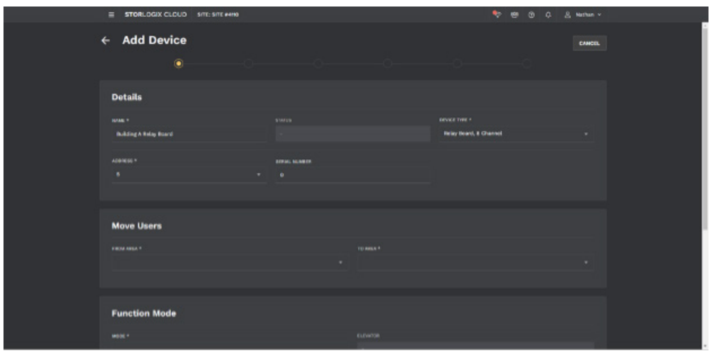


Finally, select an input for a Request To Exit button if it applies (This step is OPTIONAL). Then hit **Submit**.



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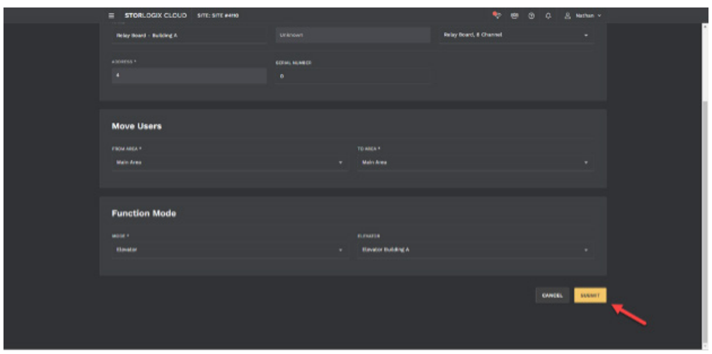
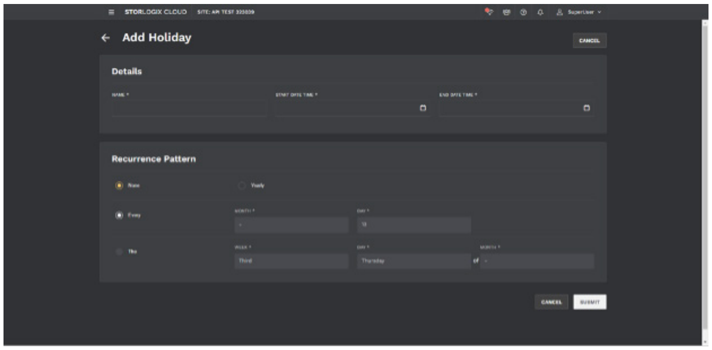
- Fill out the required fields including to be sure to select the Access Point from the device type list that will be controlling the elevator.



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

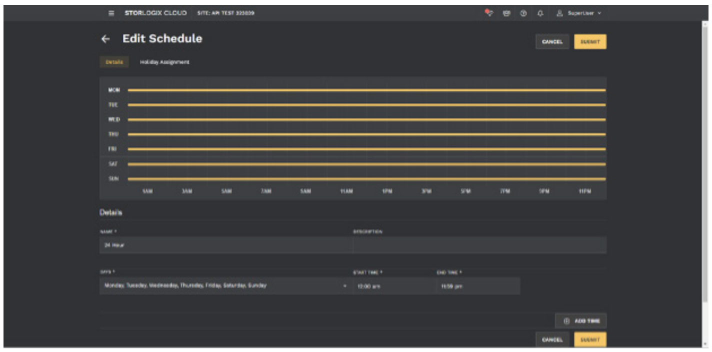
Go all the way to the last required step and finally, click **Submit**.

Setting Up Devices & Access Points



Next add Holidays found in **Operations > Holidays > Add Holiday.** This is an OPTIONAL step.

Click **Submit** once complete or skip altogether.



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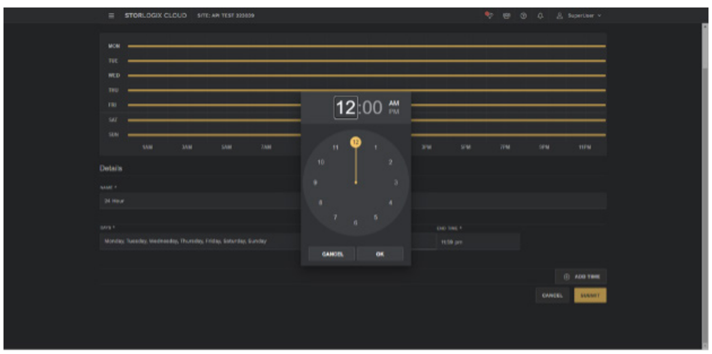
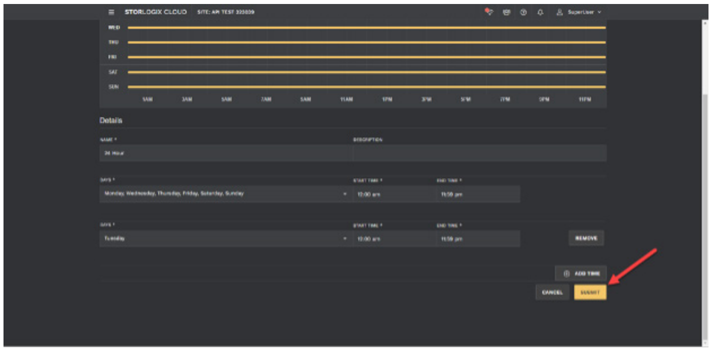
- You will see a configuration window appear. Here you can adjust the name, hour of the day, and day of the week to meet the needs of your specific operation. Click **Edit** to make changes.

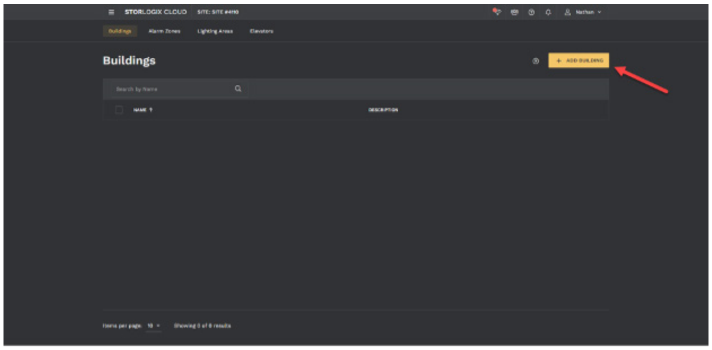


Use the dropdowns to adjust the days of the week. Click the **Start Time** and **End Time** fields to drag the hour hand on the clock to the intended times.

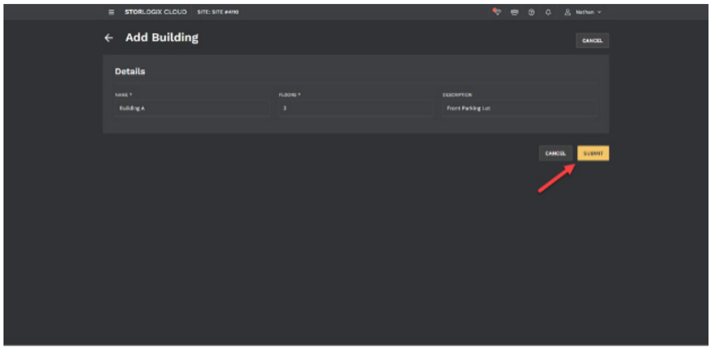


Finally, to add another unique time to the Schedule, click the Add Time Hit Submit to save the Schedule.

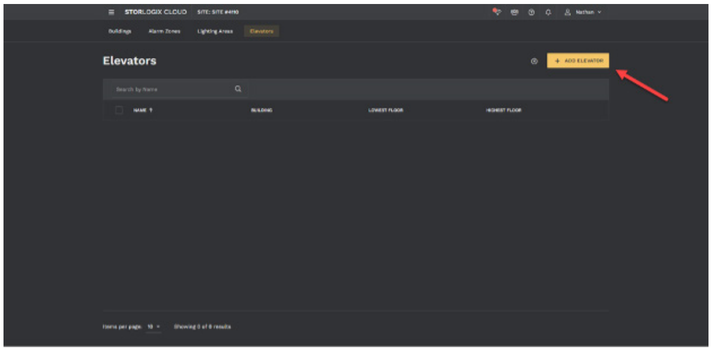
Setting Up Devices & Access Points



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.

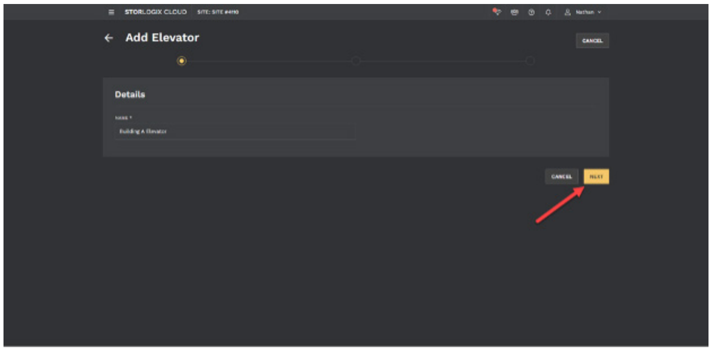


Fill out the required fields, Name and Floors (see screenshot), and then click **Submit**.



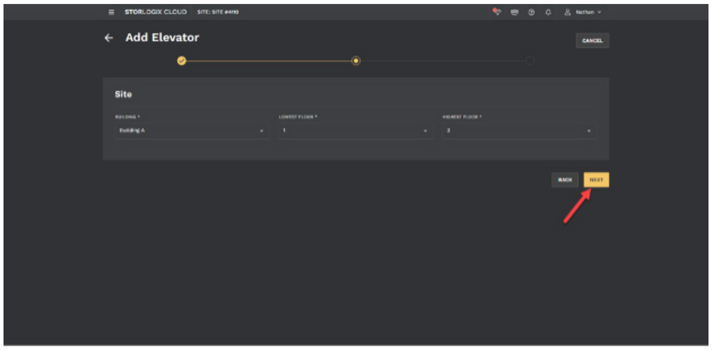
Now it is time to configure the Elevators.

Click Facilities > Elevators > Add Elevator.

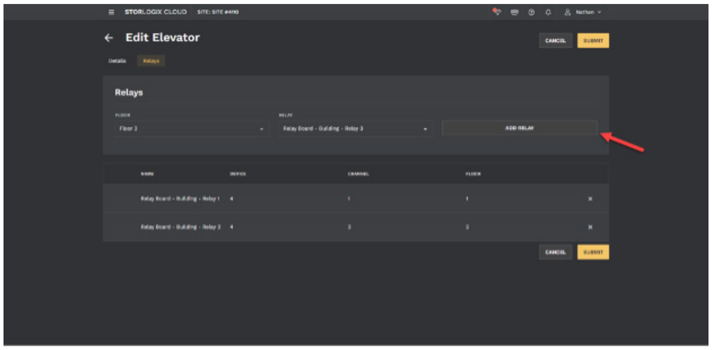


Provide the Elevator a Name then click **Next**.

Setting Up Devices & Access Points

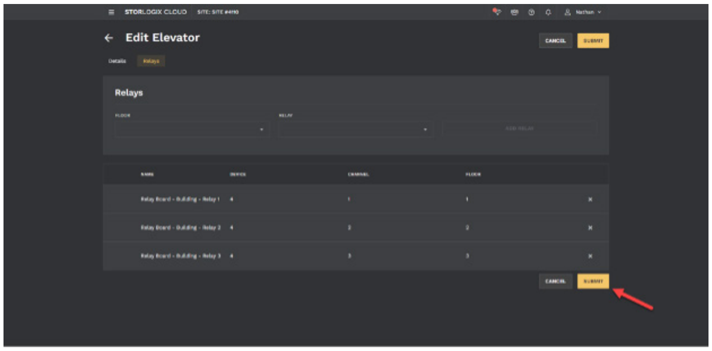


Select the Building from the drop down. Then set the lowest floor (in this case 1), and the highest floor (in this case 3). NOTE: the lowest and highest floor should detail the lowest and highest floors you plan to use the for Elevator Controls. Then click **Next**.

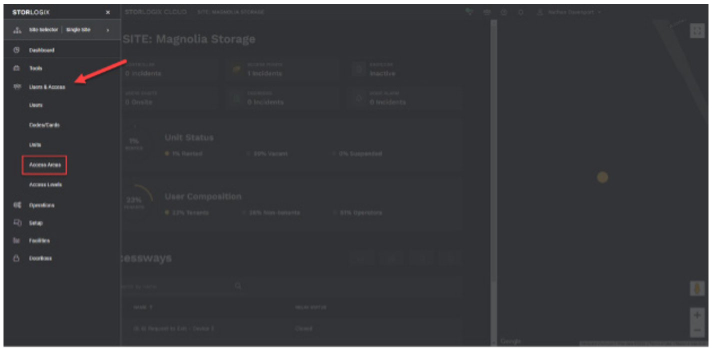


Next, select the relays that will control each floor.

- First select the Floor from the list. Then the Relay.
- After the assignment is correct, then click **Add Relay**



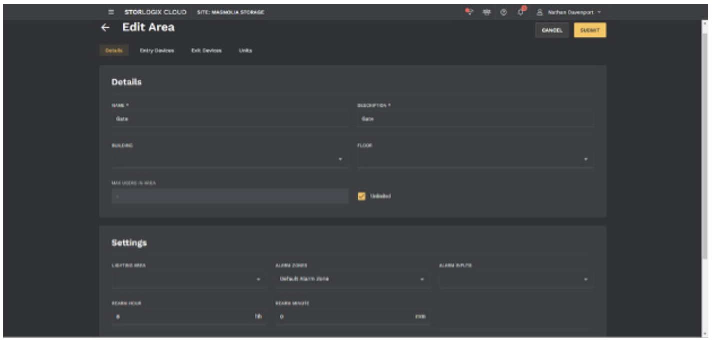
After matching all floors to the needed relays, click **Submit**.



Next you will need to setup Access Areas.

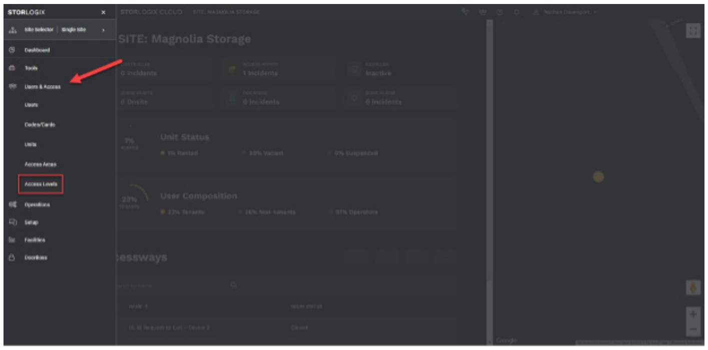
Click Users & Access > Access Areas > Add Area (or edit an existing).

Setting Up Devices & Access Points



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.

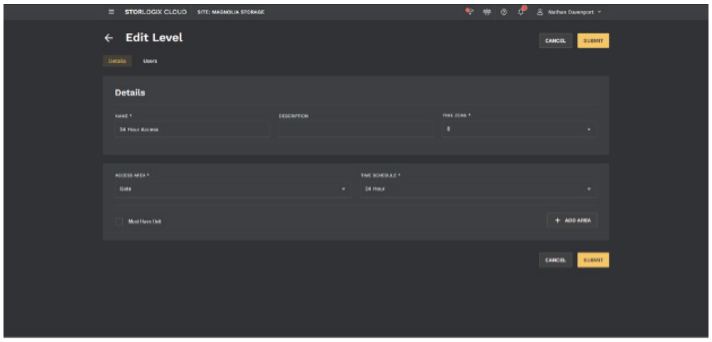


In the Details tab, you can edit the name and provide a description.

- 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.
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**.

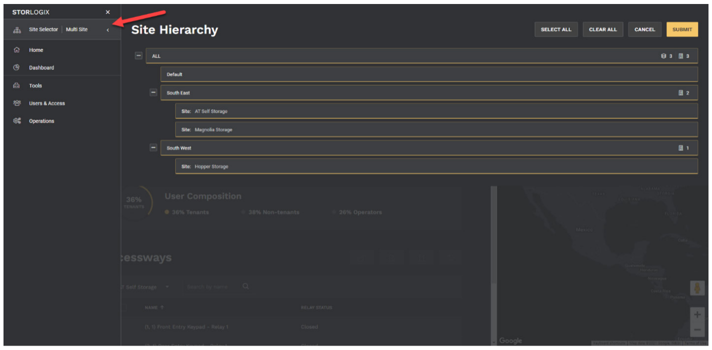


You can edit an Access Level back clicking the row.
The Edit Level configuration window will appear.

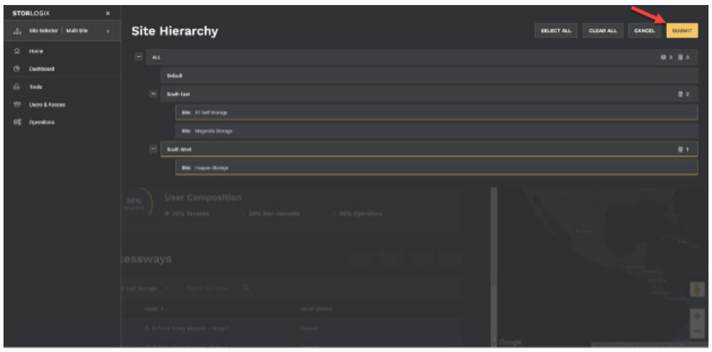
Under the Details tab you can provide a name and associate the Access Level with the appropriate interface Time Zone.

- 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



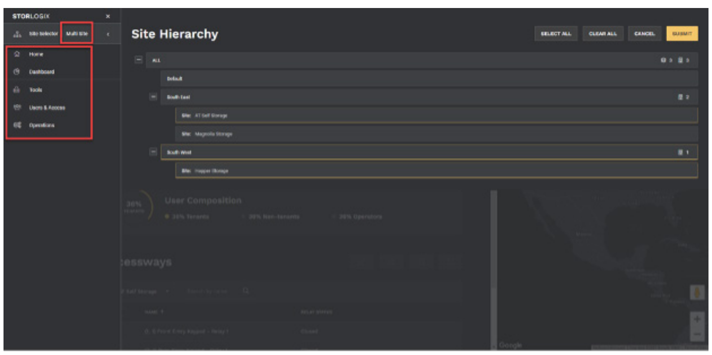
In the latest version of StorLogix Cloud, Operators select the site level they wish to view access control data. After logging in, Operators land at the dashboard, which shows an aggregation of site data based on the total number of sites they have access to view. For example, a district manager may only have software access to their district. Therefore, when they log in, the dashboard and any other page they travel to will only include their district's data and nothing else.



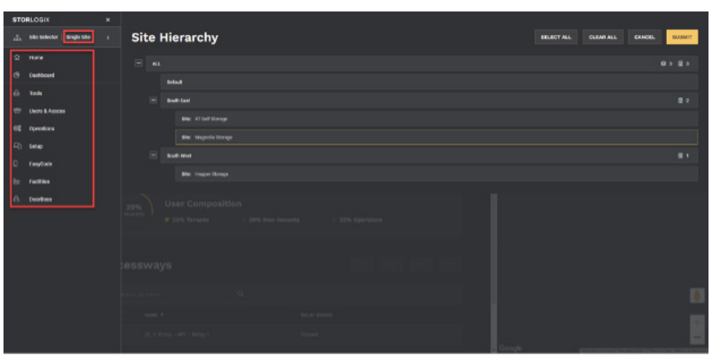
To select a site view, click on the Navigation menu in the top left corner:

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**.



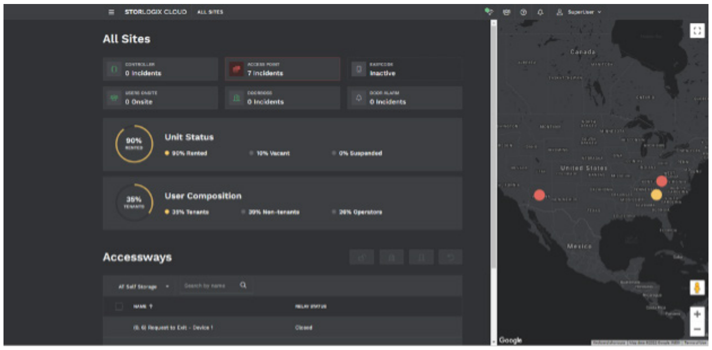
Multi-Site Selection

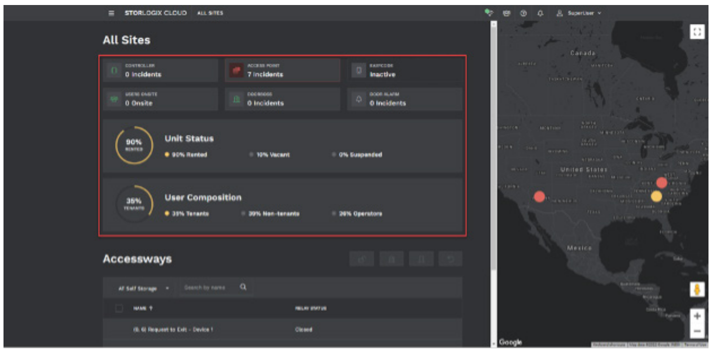


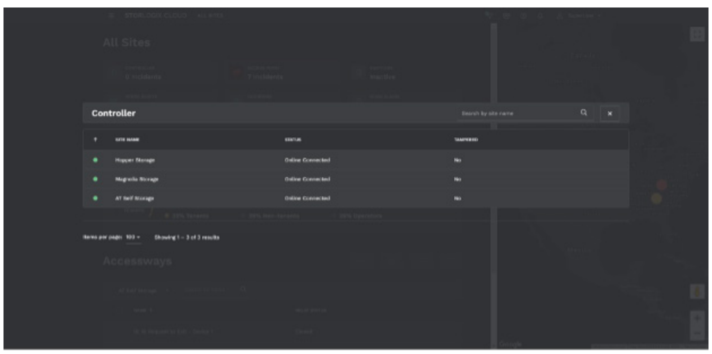
Single Site Selection

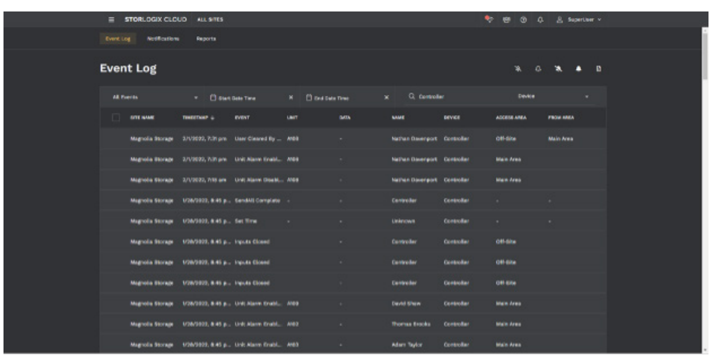
The single-site view allows users to select sections like, Setup, EasyCode, Facilities, and DoorBoss. It is risky to allow these sections to be selectable when viewing multiple sites' worth of data at a time. For example, to gain access to the Setup section, select a single site first.

Dashboard









The new dashboard is an exclusive feature only available to CloudController sites. Falcon XT sites will not have this capability. The dashboard provides greater visibility and insights into the critical hardware and events that occur throughout your portfolio. This feature aggregates up or down based on the selection you make in the Multi-Site Hierarchy.

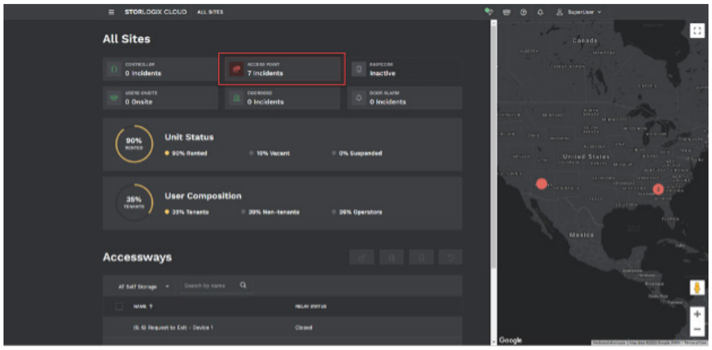
After Logging to StorLogix Cloud, you automatically land on the dashboard and view the highest level of sites you're assigned.

The dashboard consists of 4 sections.
Key Performance Indicators ("KPIs"). The KPIs provide a quick glance of real-time statuses and are aggregated based on the Multi-Site selection.

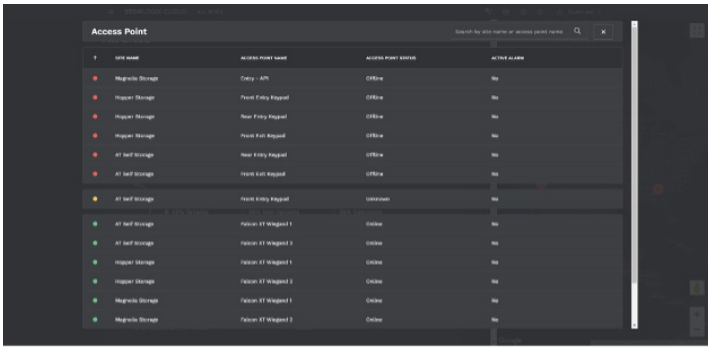
The Controller KPI provides three different pieces of information, Online, Offline, and Tampered. To view each sites' Controller even further, click on the **KPI**.

Here you can see the exact status of each CloudController site you have chosen or have permission to view. **Click into any row t**o look even deeper at the details. After clicking on a row, the Operator is taken to the Event Log of the site they clicked, filtered to show All Events, and automatically selected the most recent events related to the site's Controller.

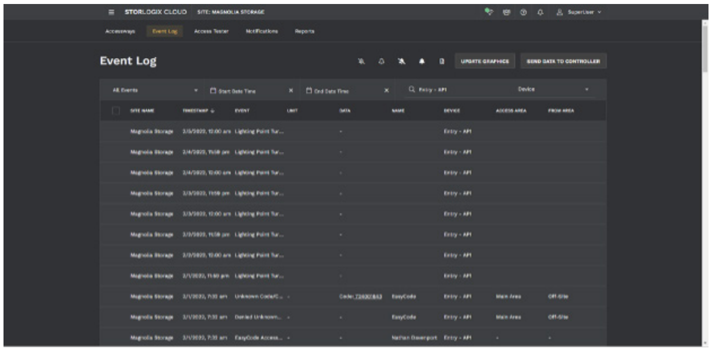
Dashboard



The next KPI is Access Points which will turn Red when Incidents exist with any keypad or reader located at any site in the Multi-Site or Single-Site selection. **Click the KPI** to learn more.

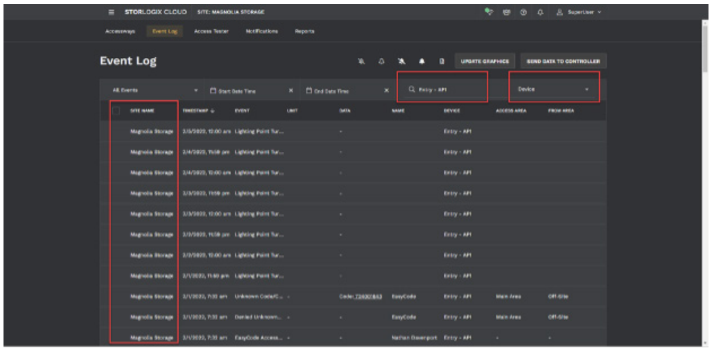


Here you'll see a list of all keypads or readers located within your selection. The columns include Site Name, Access Point Name, Access Point Status, and Active Alarm.



The Access Points with active Incidents are grouped together and displayed at the top of the list. This KPI list will display Access Points that are "Online", "Offline", "Unknown", or "Tampered".

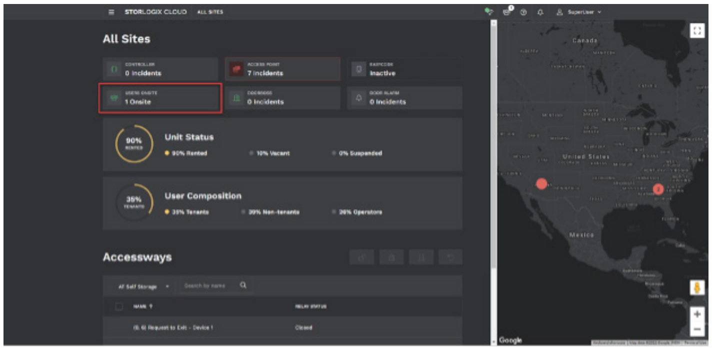
Click a row to learn more.



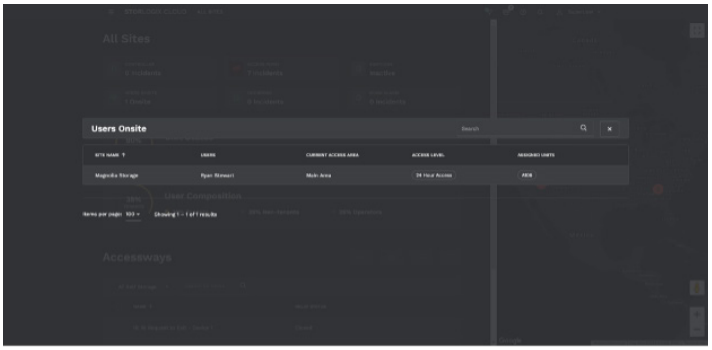
Just like before, StorLogix Cloud takes the Operator to the Site Event Log associated with the Access Point that was clicked.

You can see in this example the Operator is taken to Magnolia Storage's Event Log, which has automatically filtered on Device, and the specific Access Point's name is added to the search field ("Entry – AP1"). This action brings the latest events related to this device straight to the top of the page.

Dashboard

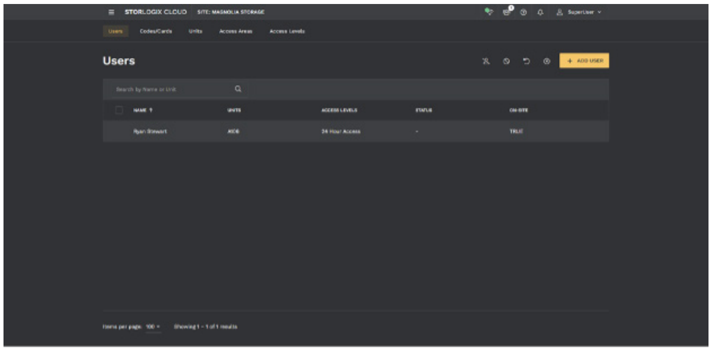


The Users Onsite KPI provides insight into the number of Users on-site at any property in the Multi-Site selection or Single-Site selection.



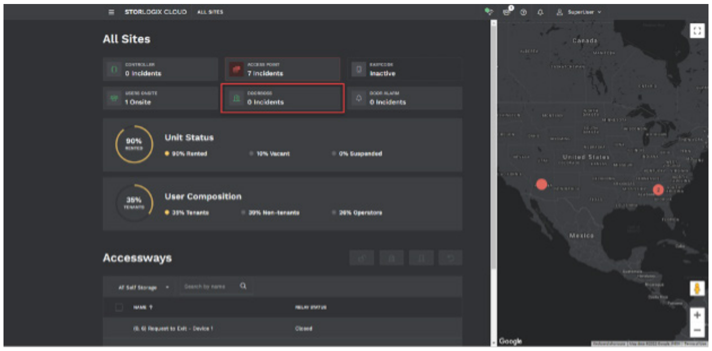
Here you can see that All Sites have been selected, and the KPI is indicating that there is currently 1 User Onsite at one of the locations.

Click on the KPI to learn more.



It is easy to see that the User is onsite at Magnolia Storage. You can also see the Name, Current Access Area, Access Level, and Assigned Units.

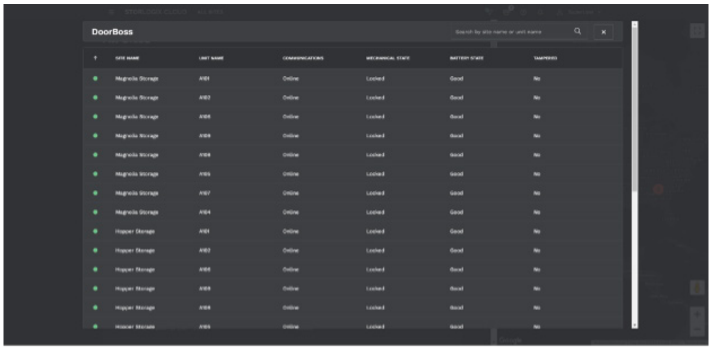
Clicking on this row will take the Operator to the Users page filtered on this User's information.



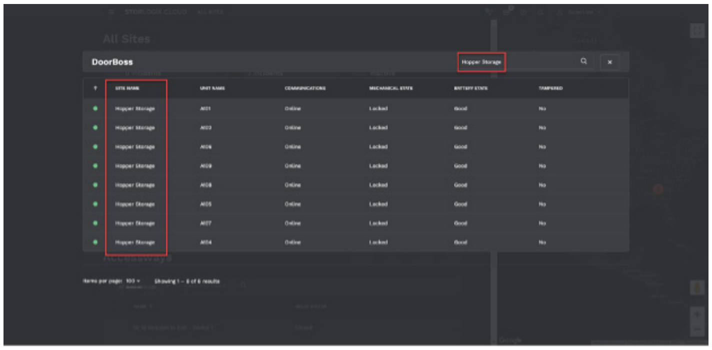
The DoorBoss KPI displays a numeric value of Incidents related to PTI's electronic overlock called DoorBoss. This KPI aggregates data from the Operator's Multi-Site or Single-Site selection.

Click the KPI to see more information.

Dashboard



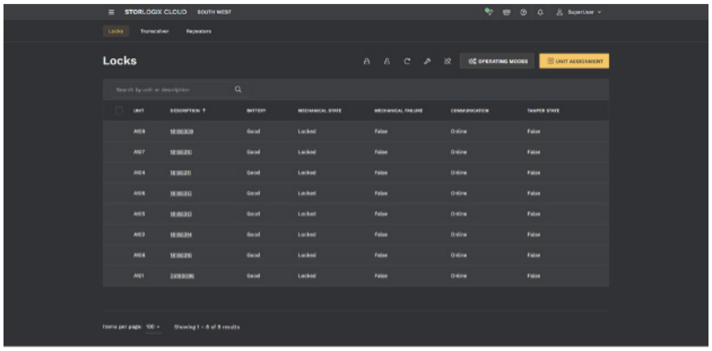
Here you can see a list of all installed DoorBoss units throughout the entire list of sites selected.



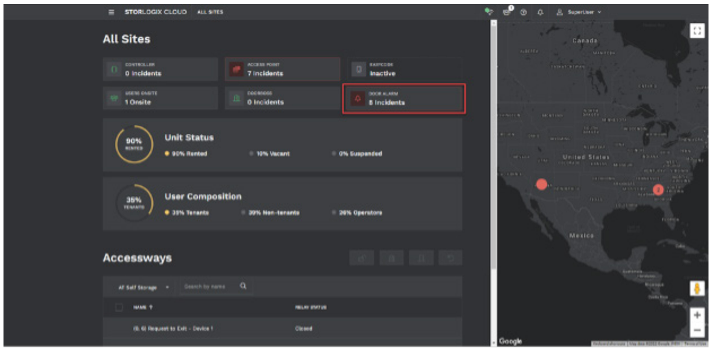
Just like the other KPIs, all rows with an Incident float to the top of the table.

In this example, there are no Incidents at any of the DoorBoss sites.

Use the **Search field** to pinpoint a specfic site or unit



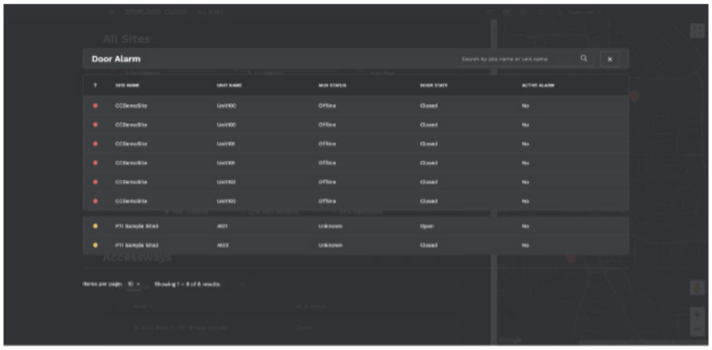
Clicking on a row takes the Operator to the DoorBoss section of StorLogix Cloud to take further actions.

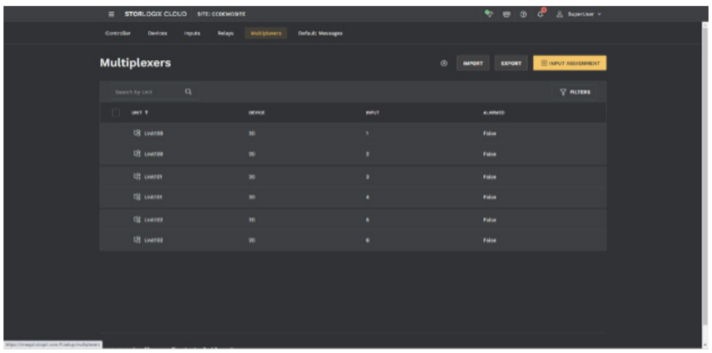


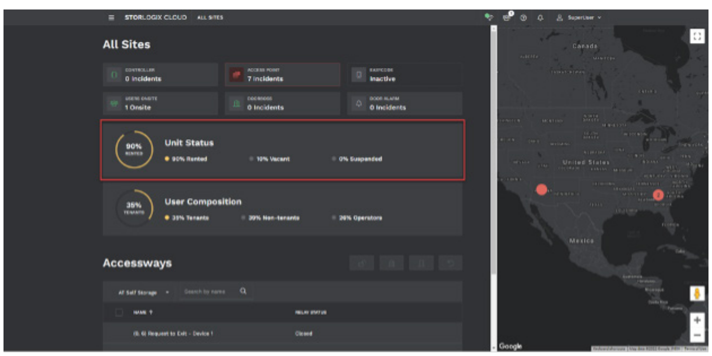
The Door Alarms KPI provides quick insights into installed Door Alarms in the Multi-Site or Single-Site selection.

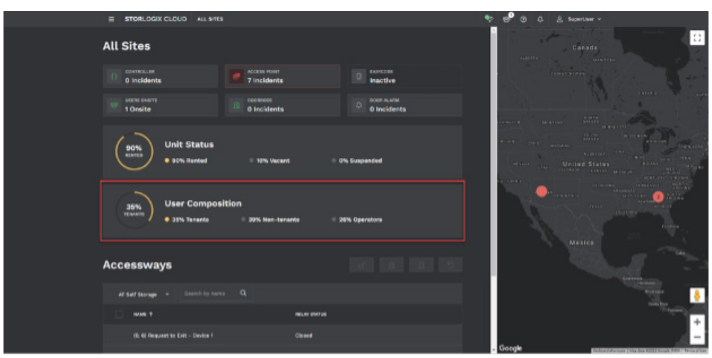
Click the KPI for more information.

Dashboard









The following table details each unit door alarms' associated Site Name, Unit Name, Mux Status, Door State, and Active Alarm

- The **Mux** is the input board installed at each site. The Door Alarm contacts all connect back wired or wirelessly to each Mux. This input board can be Online, Offline, or Unknown.
- The **Door State** shows the current position of each Unit's door. This state is binary and can be either Open or Closed.
- The **Active Alarm** status is based on 3 StorLogix Cloud events related to Door Alarms:
  - **Rented Unit Door Alarm**: The assigned User is not onsite, but the Unit Door is Open.
  - **Vacant Unit Door Alarm:** A vacant Unit is open.
  - **Suspended Unit Door Alarm**: A suspended Unit is open.

Clicking on a single row takes the Operator to the related Site's Multiplexer To learn more, go to the Multiplexers section in this guide.

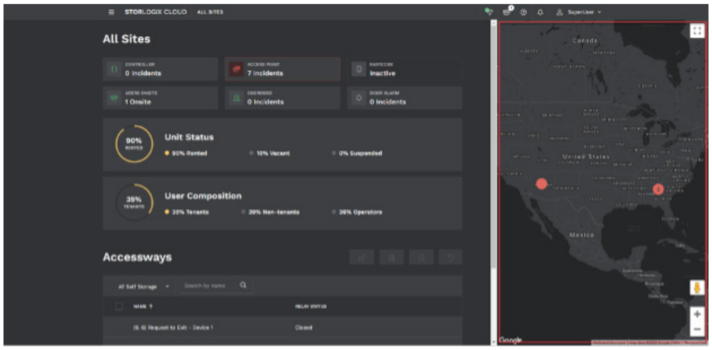
The KPI in the middle of the page is called **Unit Status**. This is an aggregation of all units within the Multi-Site or Single-Site selection.

- Specific to Multi-Site or Single-Site selection:
  - **% Rented:** All assigned Units / Total Units
  - **% Vacant:** All unassigned Units / Total Units
  - **% Suspended:** All Suspended Units / Total Units

The KPI below is called **User Composition.** This is like Unit Status but analyzes User categories.

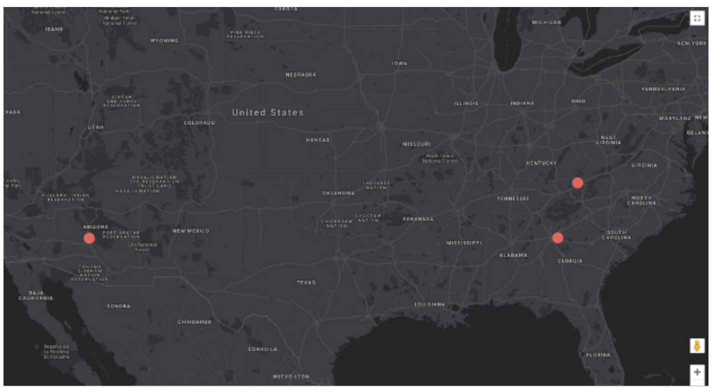
- Specific to Multi-Site or Single-Site selection:
  - **% Tenants**: All Users assigned to a Unit / Total Users
  - **% Non-Tenants:** All Users unassigned to a Unit / Total Users
  - **% Operators:** All Users that are also Operators / Total Users

Dashboard

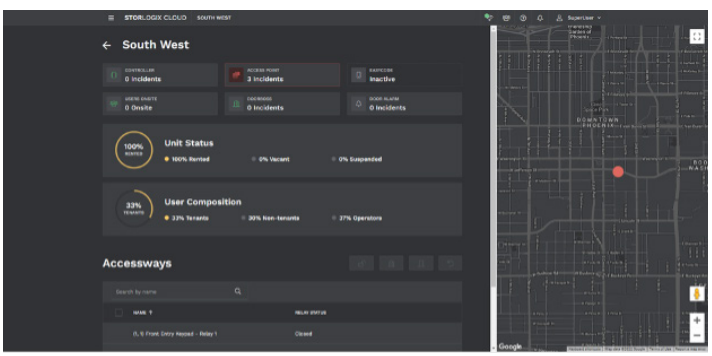


The second piece of the dashboard is the **Geographic Map**.

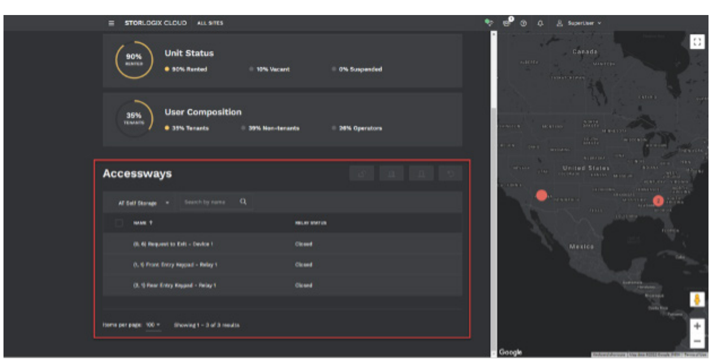
This map indicates locations of sites based on the Operator's Multi-Site or Single-Site selection. Location pins (green, yellow, red) help the Operator quickly view the location, name, and status of a facility. If any of the KPIs being viewed within the dashboard are yellow or red, the corresponding site location will turn yellow or red. If all of the KPIs for a site are green, then the site location pin stays green.



You can zoom, scroll, and drag the geographic map as needed. You can also click the icon in the top right corner of the map to go full-screen mode.



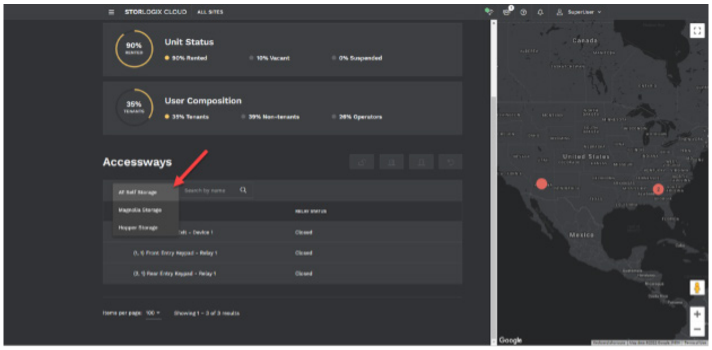
Clicking on a pin reset's the dashboard to show only that site's data in the KPIs.



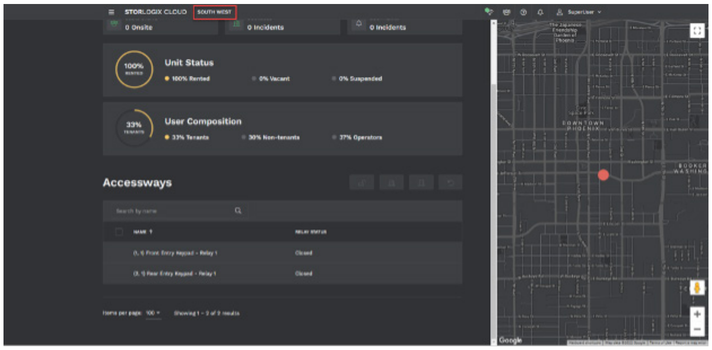
The third and final section of the dashboard is called **Accessways**.

Here an Operator can control any of the manual relays throughout the Multi-Site or Single-Site selection.

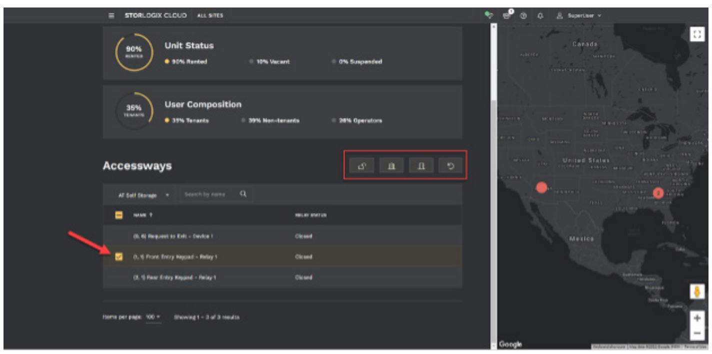
Dashboard



If you are currently in **Multi-Site** view, then you will be able to select any site in the selection by clicking the drop-down below (red arrow).



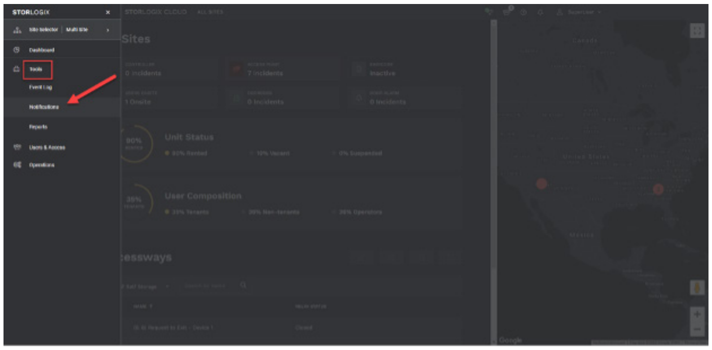
If you are in **Single-Site** mode, you will only be able to control the relays related to the site you have selected.



To manually control a door or gate, select the checkbox to the left of the list relay (red arrow), and click one of the four action buttons shown below (red box).
Buttons Include:

- **Open**: Briefly opens the Accessway
- **Hold Open**: Locks the Accessway in the Open position
- **Hold Closed**: Locks the Accessway in the Closed position
- **Release**: Unlocks the Accessway from its previous position

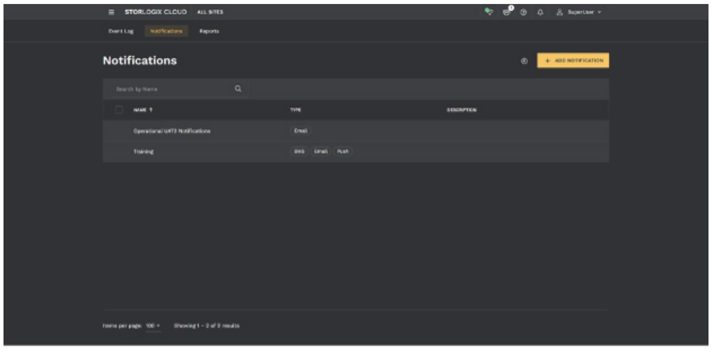
Notifications



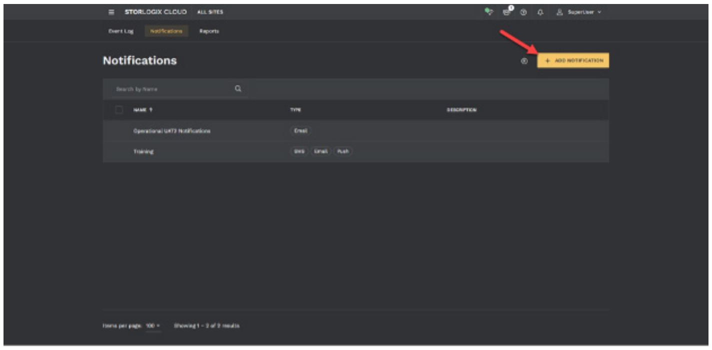
This new feature is exclusive to PTI's new CloudController. It is not available with the Falcon XT. Beneficial to Operators, Installers, and Tenants alike, Notifications provide templates that can be applied to Multi-Site selections or Single-Site selections and allow the recipient to only receive the data they care about. You are no longer subjected to white noise or useless information. Take time to carefully set these templates up and watch your operations' efficiency take off. These notifications include SMS (Text), Email, and Push (for StorLogix Mobile) Notifications.

To set up a Notification:

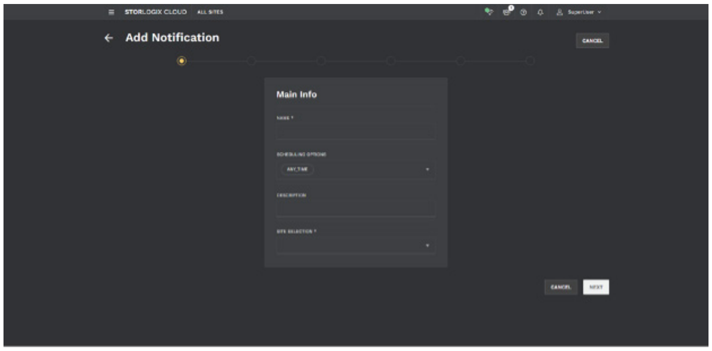
Click on the Navigation Menu > Tools > Notifications



You will land on the Notification List section that displays previously configured templates.

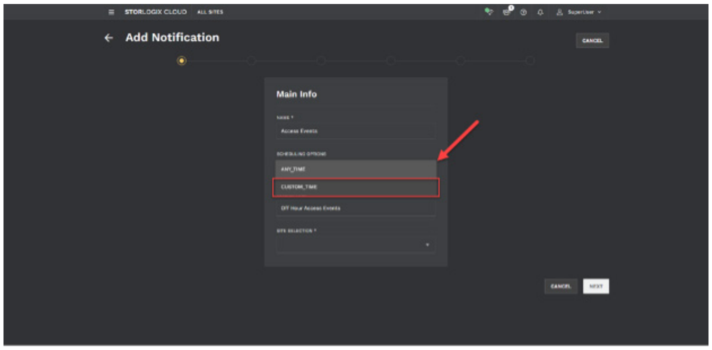


To create a new template, click on **Add Notification.**

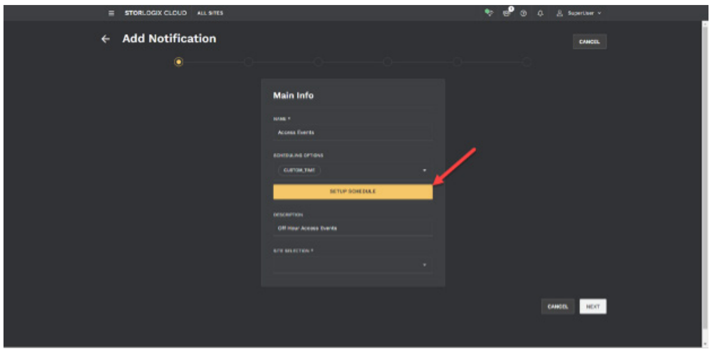


In this first step, fill out the Main Info like Name, Scheduling Options, and Site Selection.

Notifications

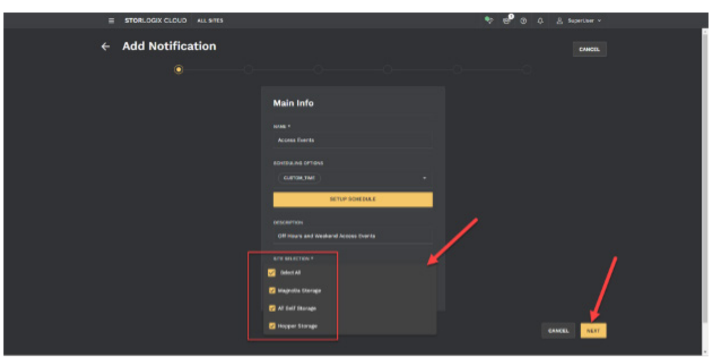


Be sure to decide what time of day and day of the week this notification should be applied to. Select the Scheduling Options drop-down to change to a custom schedule.



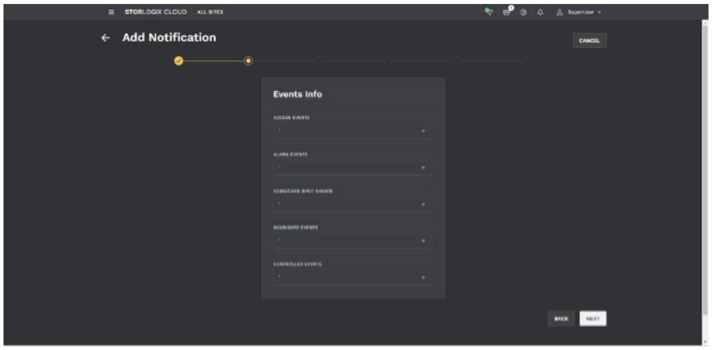
Click **Setup Schedule**.

Configure the Custom Schedule just like the standard Schedule Setup.



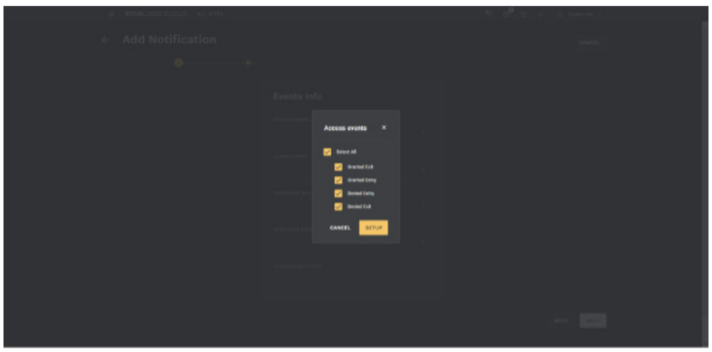
Next, select the sites you would like to apply to this Notification template, then hit **Next**.

Notifications

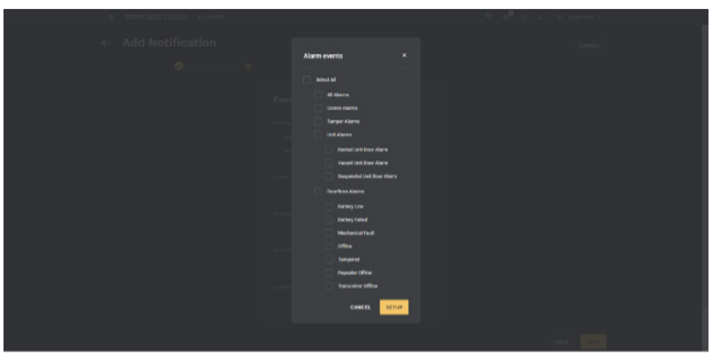


The second step to set up a new Notification is called **Events Info**.

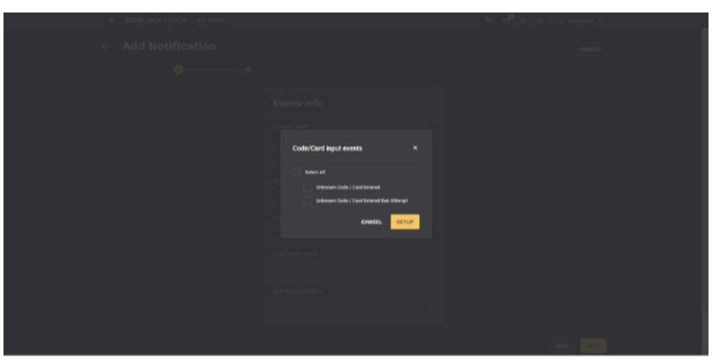
Here the Operator or Installer selects the important StorLogix Cloud events that will trigger a real-time notification when they occur.



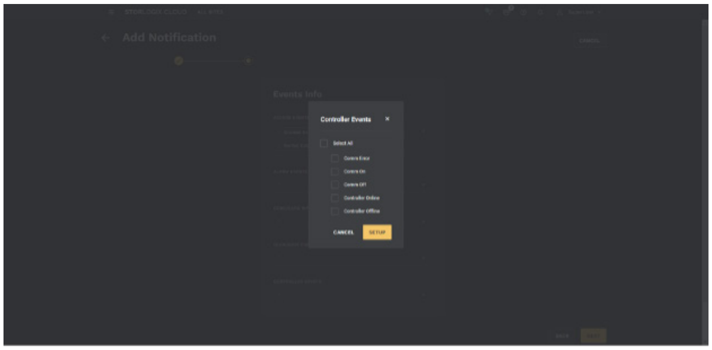
In this example, the Operator is only interested in Access Events during off-hours and weekends. To select these specific events, click the Access Events drop-down arrow and check the boxes that apply. Then hit Submit.



Be sure to check out all the events that can currently trigger a notification and set up multiple templates to drastically improve visibility throughout your operations. Hit Next to go to the next step.

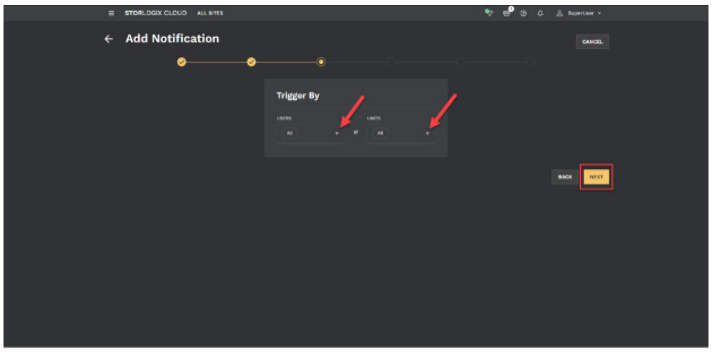


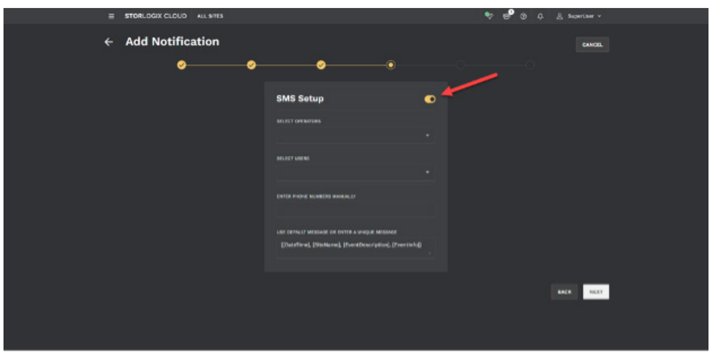
Notifications



Step three is **Trigger By**. Here you can select specific site Users or Units you would like to run this template through. In other words, you can decide to apply the template to All Users and/or Units or only Users and/or Units worth keeping visibility on.

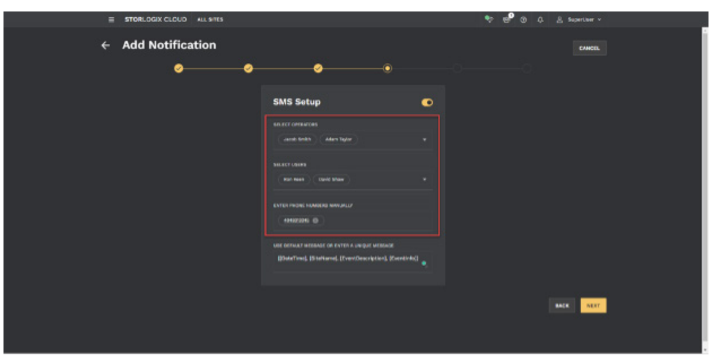
- Ex: John Smith often causes issues when onsite, so I want to set this notification template to ONLY apply when the selected events relate to John Smith. Otherwise, I don't want to be bothered by the selected events.
- Ex: Unit 204 – Unit 210 are in a vulnerable area and not lit up at night. The Site Manager would like to be notified of activity at night, but ONLY if it applies to Units 204 – 210.





Steps four, five, and six are where the Operator defines the Destination.

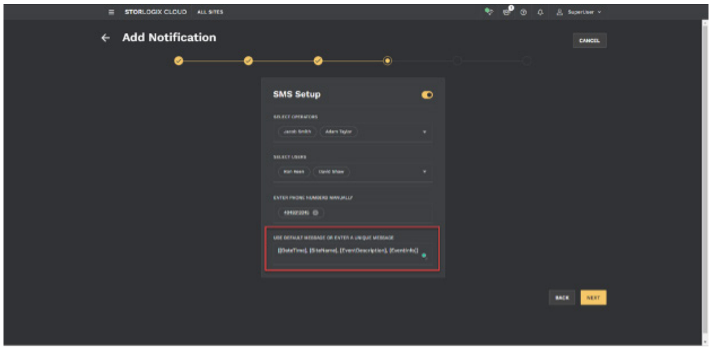
- Select the toggle in the top right corner (red arrow) to enable the SMS Setup.



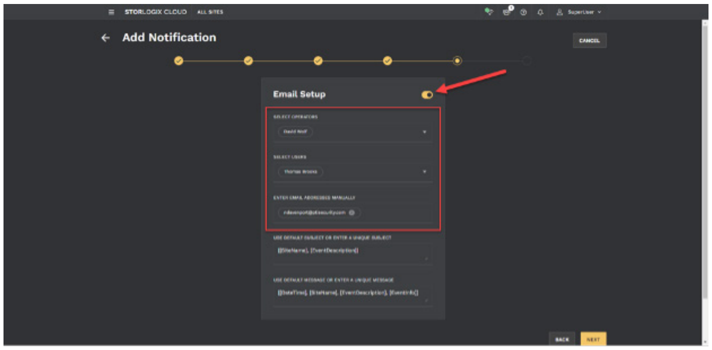
Y

ou can quickly select the recipients by clicking on the **Select Operator** dropdown, the **Select Users** dropdown, or Enter Phone Numbers Manually. Choose all three options or just one.

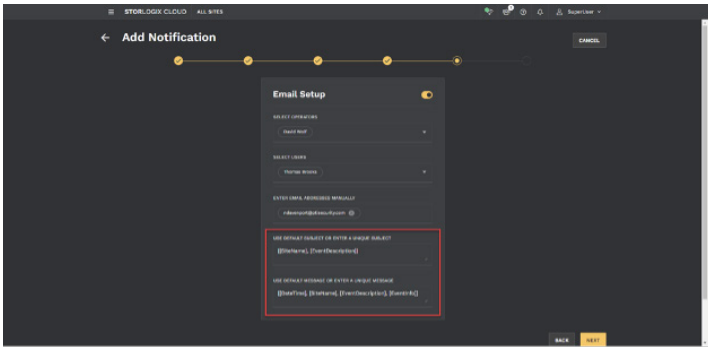
Notifications



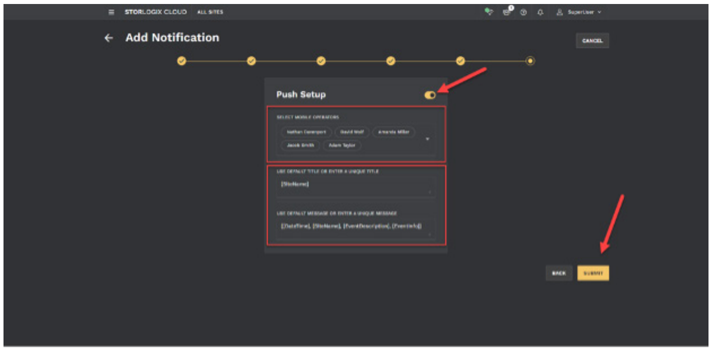
The content of the message provides default information related to the events you previously selected, and it is also editable.



Step five is very similar except specific to Email Select an **Operator email** or **User email** directly from StorLogix Cloud, or enter one manually. All three fields can be filled at the same time.

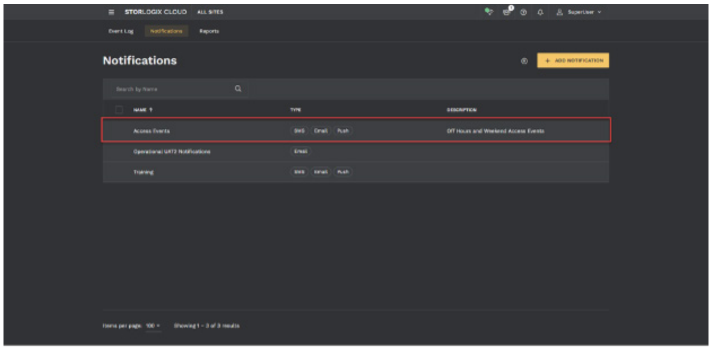


The default message is available and editable in both the Subject and Body of the email.



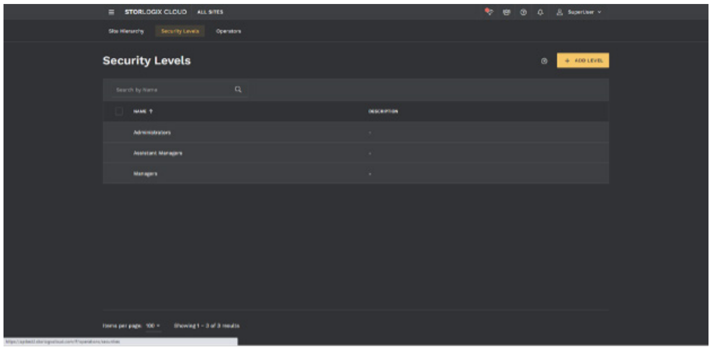
The final step is Push Setup, which applies only to Operators using StorLogix Mobile 2.0. Select **Operators** from the list and use or edit the Subject and Body messages. This Push Notification will show up on the Operators' iPhone or Android that have downloaded the app. It will display as an icon or banner at the top of their phones.

Notifications



After clicking **Submit**, the new Notification template is now active (based on the selected schedule) and will show up in the Notifications list to edit when needed.

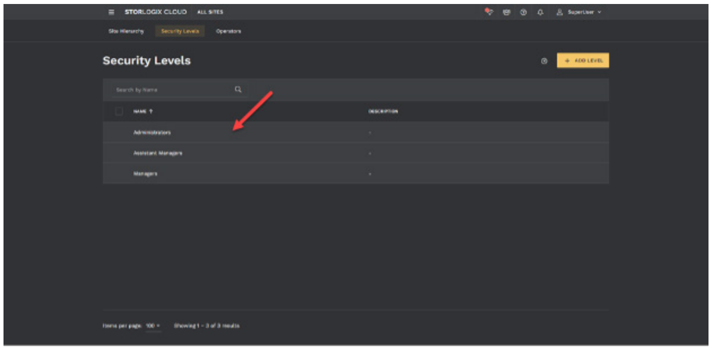
Security Levels



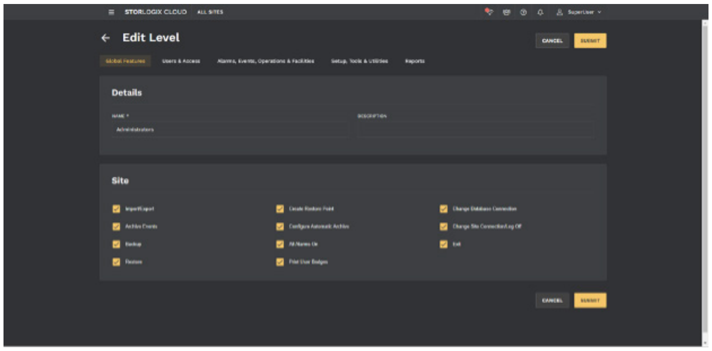
Security Levels are StorLogix Cloud roles that are assigned to each Operator. The Security Levels can be manually edited and saved to fit the needs of your unique operation. However, Administrator, Manager, and Assistant Manager roles are provided by default.

To view or edit Security Levels:

Select Operations > Security Levels.

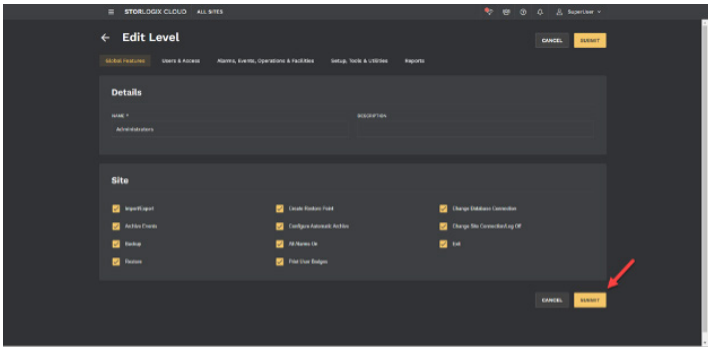


To view or edit the permissions in a Security Level, click the row.



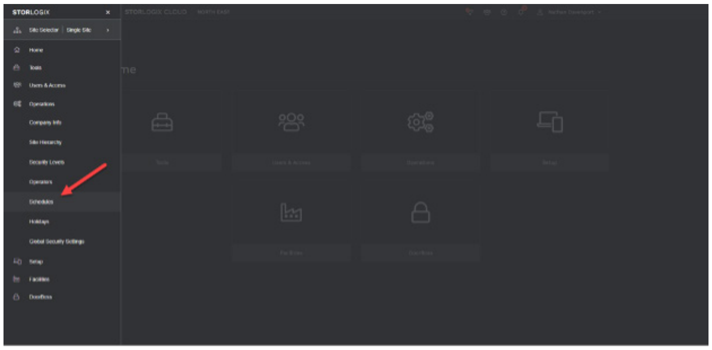
A configuration window will open and will detail multiple permissions.

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**.

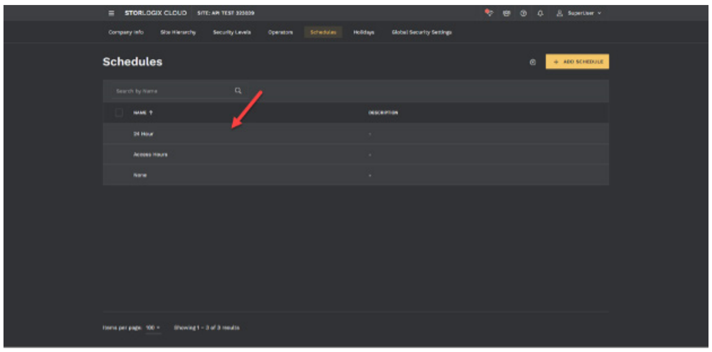
Schedules



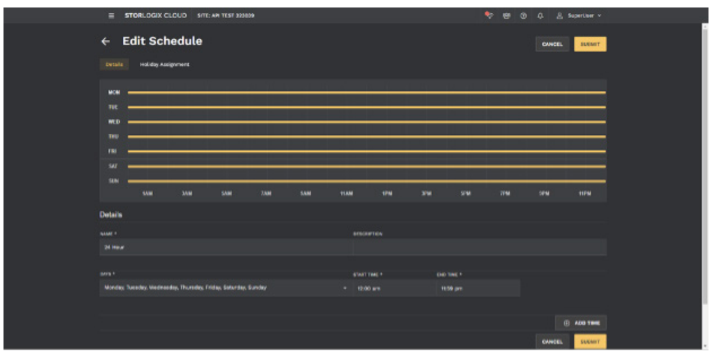
Schedules are hours of allowed access at a facility. The new UI allows for intuitive adjustments to an operation's Schedule. To view Schedules, first, ensure you have selected a Single Site. This feature is hidden in Multi-Site mode.

To view, edit, or add a Schedule:

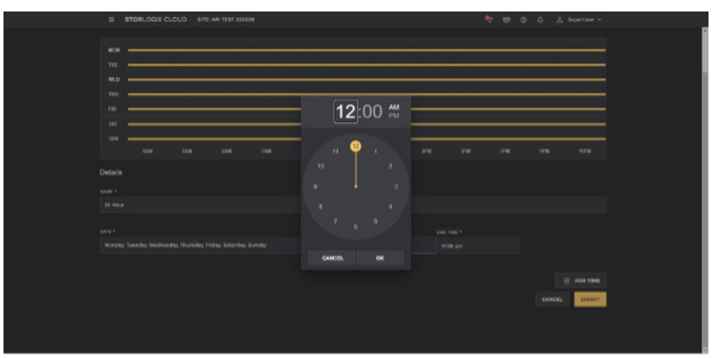
Select Operations > Schedules.



To edit a Schedule, click on the row.



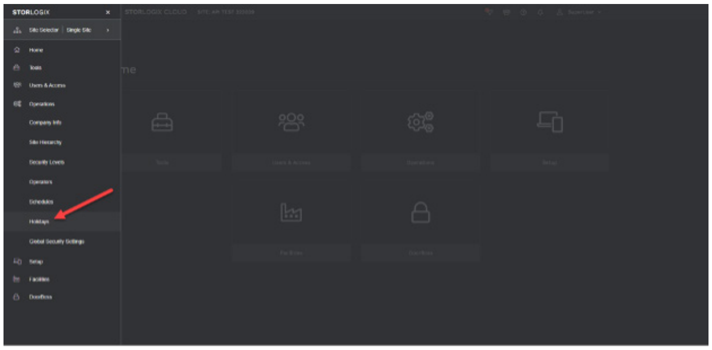
You will see a configuration window appear. Here you can adjust the name, hour of the day, and day of the week to meet the needs of your specific operation. Click **Edit** to make changes.

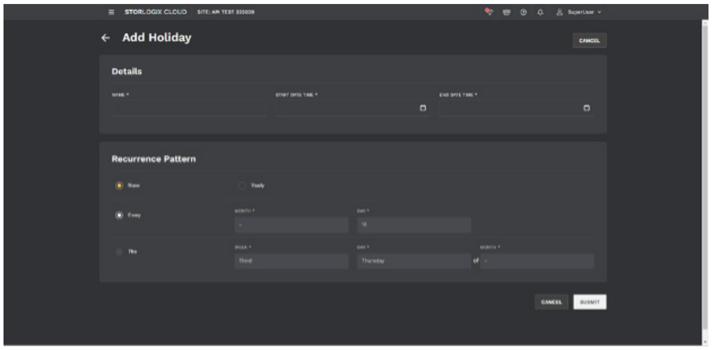


Use the dropdowns to adjust the days of the week. Click the **Start Time** and **End Time** fields to drag the hour hand on the clock to the intended times.

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

Holidays



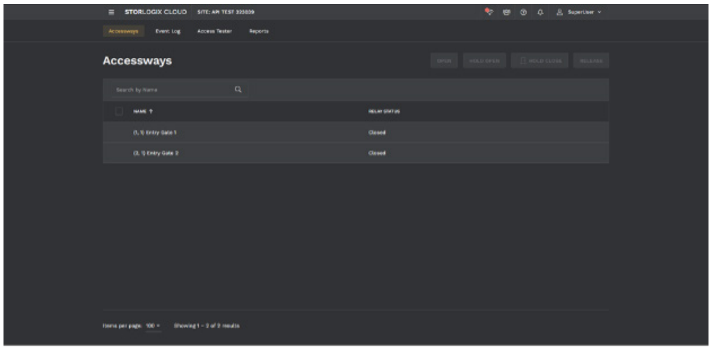


Operators need a way to streamline their schedules, and one of the features that helps do just that is Holidays. Here the Operator can use default holidays like July 4th or create custom holidays to fit their specific operational needs. To view Holidays, first ensure you have selected a Single Site.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

To setup Holidays:
Select Operations > Holidays.

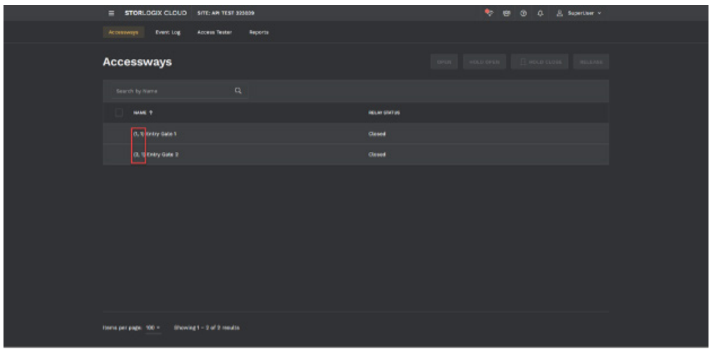
Click **Add Holiday** and create the holidays your organization observes.

Accessways

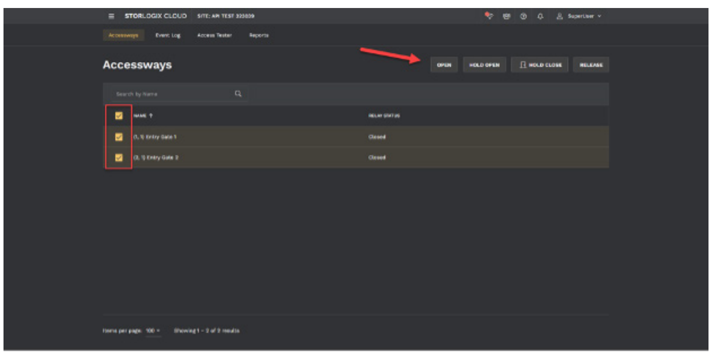


Controlling a facility's doors and gates remotely is a key reason why cloud-based software is so valuable. StorLogix Cloud makes this easy and even provides a way to control all the doors or gates at a facility at once. To view Accessways, first ensure you have selected a Single Site. This feature is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

To control Accessways:
Select Tools > Accessways.

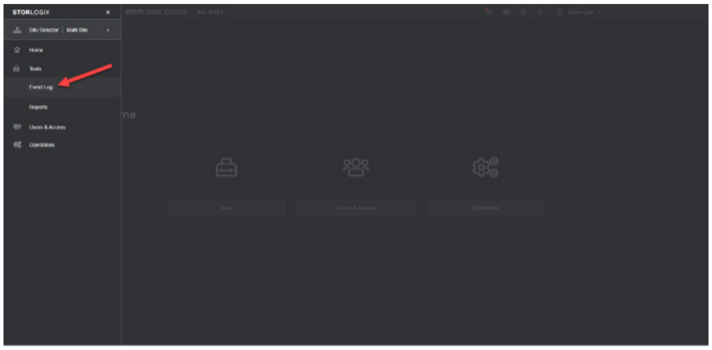


Each Accessway is a relay that an installer has selected to be manually controllable. Therefore, to the left of each Accessway name, you'll notice two numbers in parenthesis. These indicate the Device Address and Relay number that is controllable.

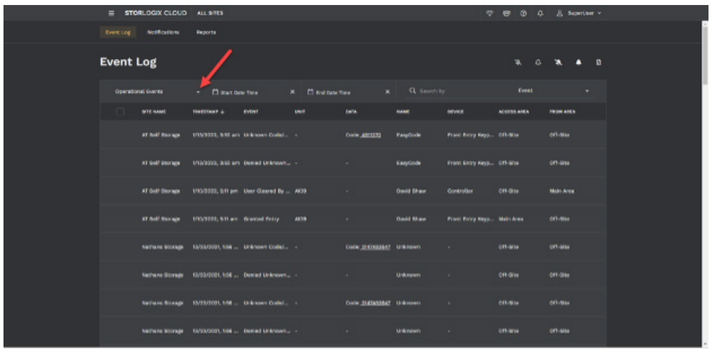


To control an Accessway, check the box to the left, then use any of the four buttons in the top right.

Event Log



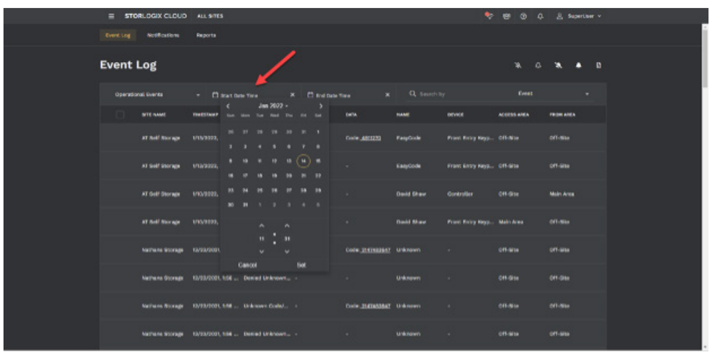
The Event Log is one of the most widely used sections in StorLogix Cloud. Every access control-related event is displayed in the section. You can watch as real-time events populate the table, search for specific events, and troubleshoot in the tab. This is also viewable in Multi-Site mode allowing the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



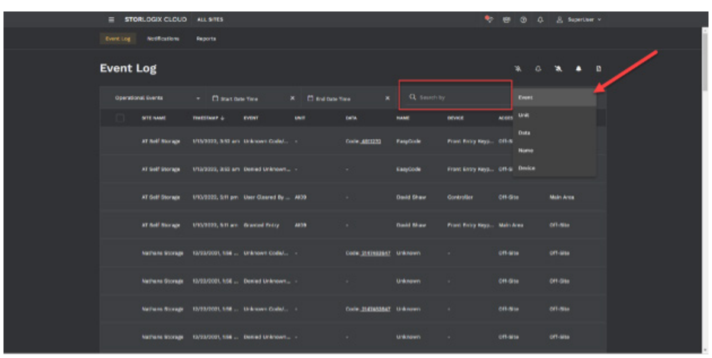
To view the Event Log, **Select Tools > Event Log.**

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.



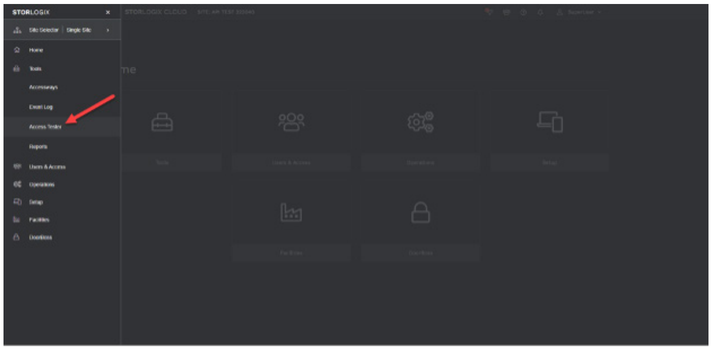
You can search by name and date to find a specific event. When selecting a timeframe, be sure to click Set below the calendar.



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.

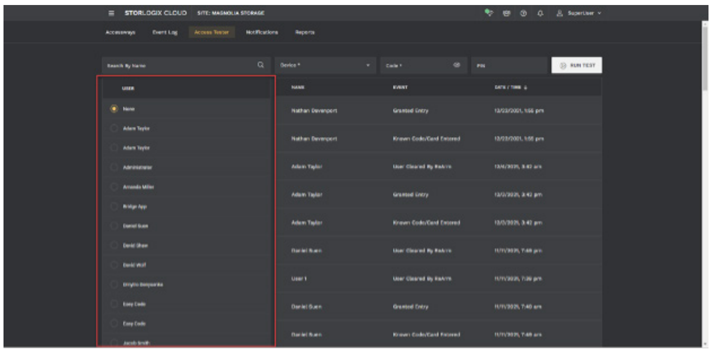
There are several buttons for clearing and silencing alarms and even an option to Export the Event Log data that have been queried. Just click the **Export** button on the top right.

Access Tester

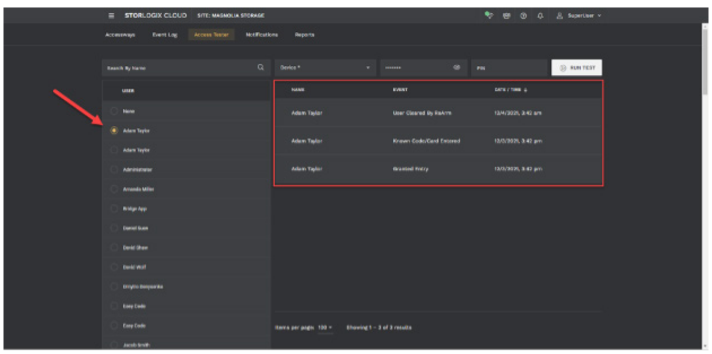


The **Access Tester** tests a site User's access code at a specific entry/exit device. This is especially valuable when testing a new tenant's code at the entry keypad immediately after onboarding. On non-cloud-based systems, this would often require site managers to walk a tenant out to the entry keypad. 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.**

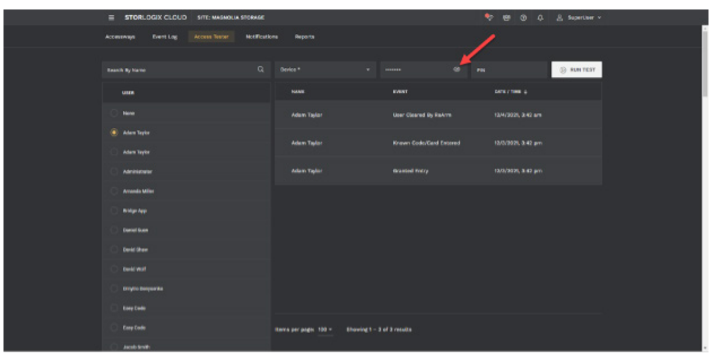


You will notice that all StorLogix Cloud Users are listed on the left-hand side of the page.



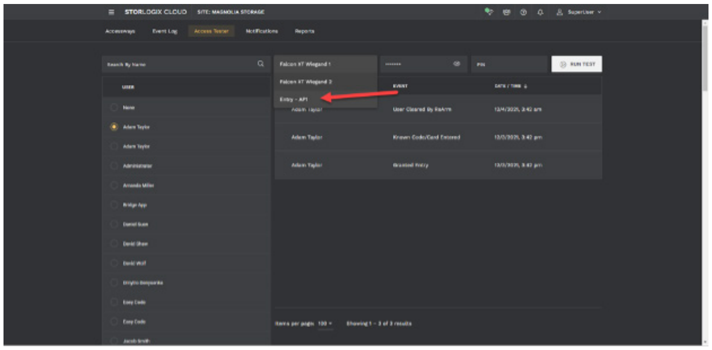
To test a User's access, click on one of the names.

- 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.

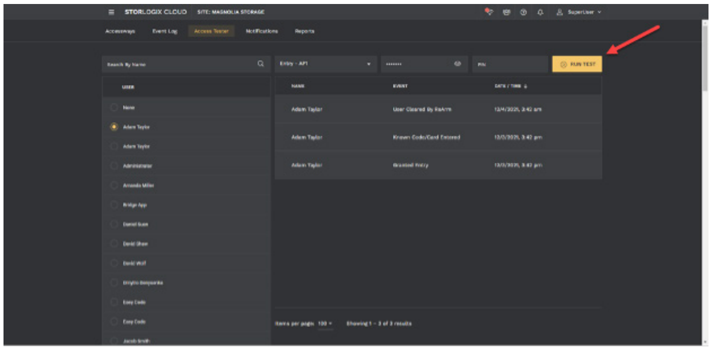


Also, you should see the User's Access Code appear under the Code, click the **Eyeball** to the right to view the code.

Access Tester



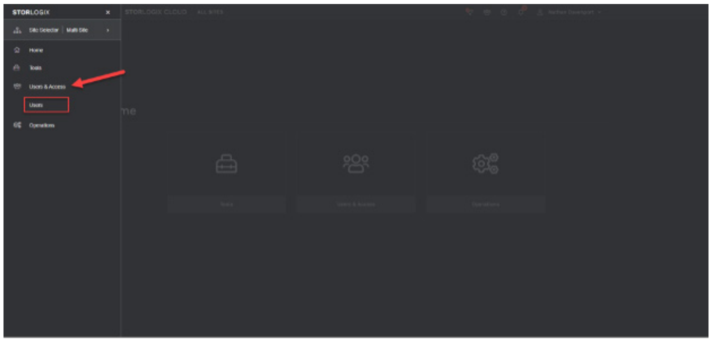
Finally, select the **Device** you would like to test the code on by clicking the dropdown.



Then, click **Run Test.**

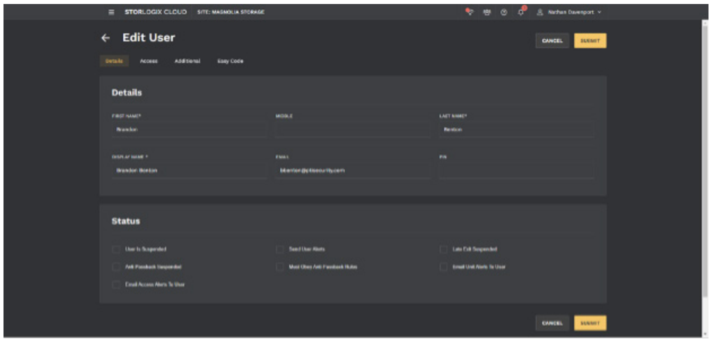
If the test is successful, you will see a success message. If the device you are testing is connected to a gate, you will also see the gate open (if it's not being held closed).

Users



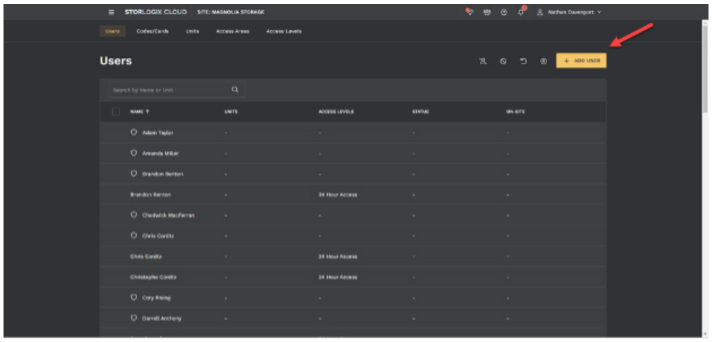
The Users section displays every StorLogix Cloud User. A User is defined as a credential holder to the physical site and is ultimately managed within StorLogix Cloud. This could be tenants renting units or people who are not renting units but have access to the site, like cleaning crew and landscapers.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

To view Users, **Select Users & Access > Users**.

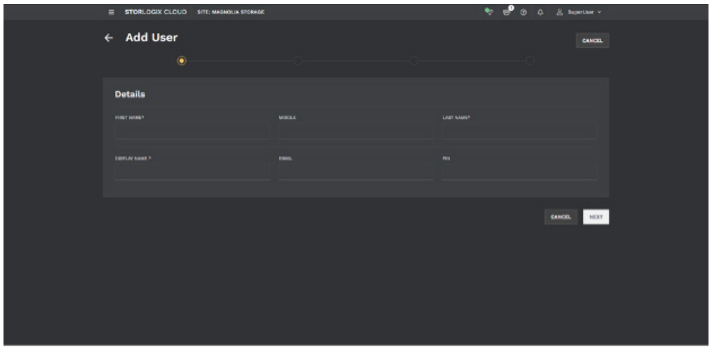


The Users section will allow the Operator to search or view any User in both Multi-Site mode and Single-Site mode. However, Multi-Site mode will only allow the Operator to view and search for a name.

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.

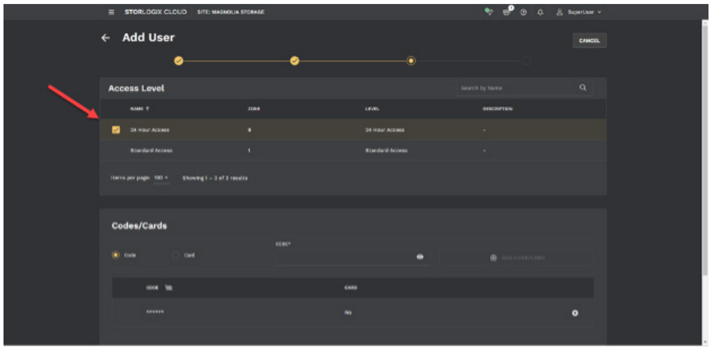


To Add a User manually (not through your property management software integration), click the **Add User** button.

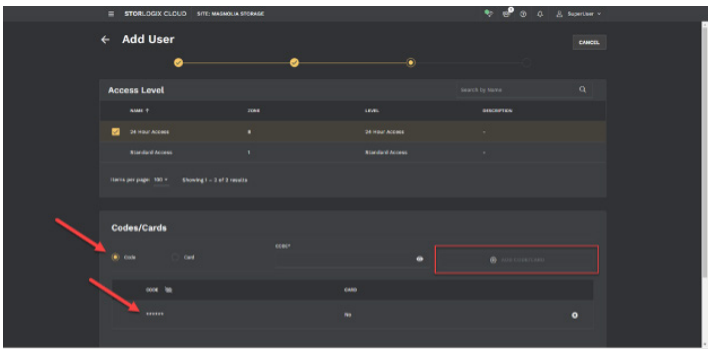


This action will display the Add Users window. Be sure to check the Authorized to use EasyCode checkbox if you would like them to have that access. Fill out the required fields to complete the action.

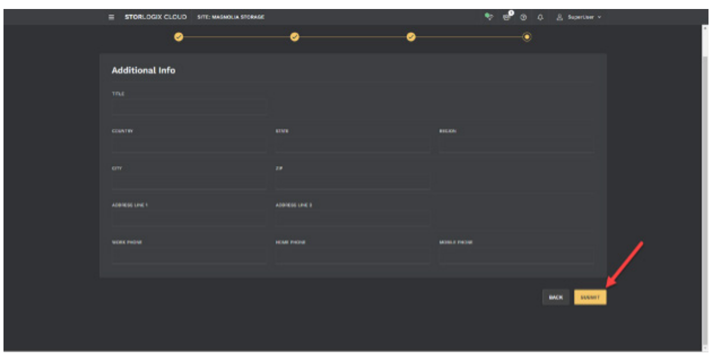
Users



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



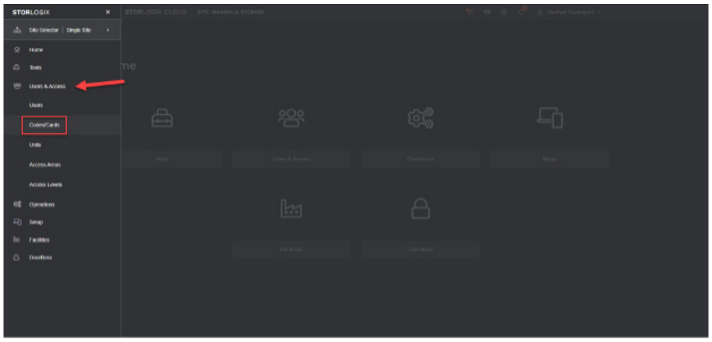
If using a physical card, toggle the switch to the right and select an available card from the dropdown. Be sure to Add Card before clicking **Next**.



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.

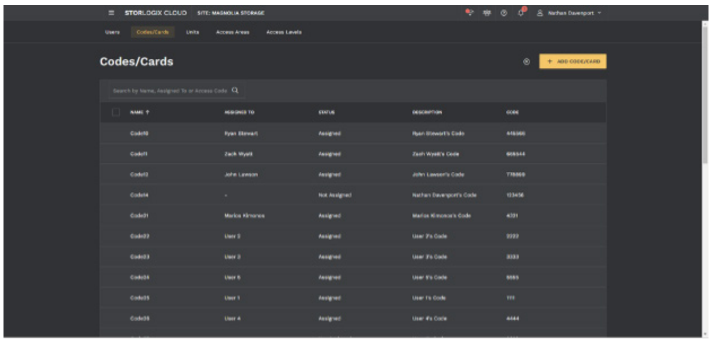
The last step is adding optional additional information.
Once complete, hit **Submit**; the new User will now be added to the User list.

Codes and Cards

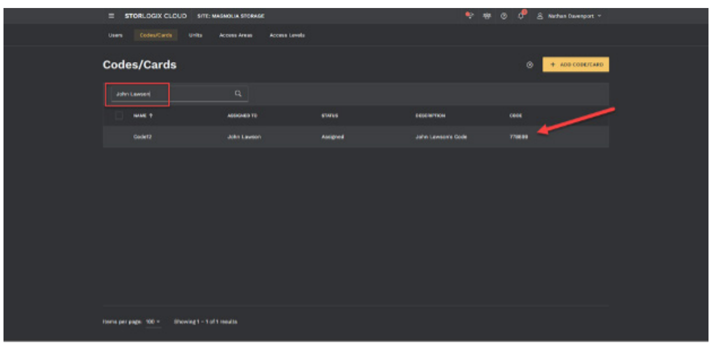


The Codes and Cards section displays all the access codes and cards stored in StorLogix Cloud. Here you can view access codes assigned to specific tenants and even procure Cards for later use. This section is only visible in Single-Site mode.

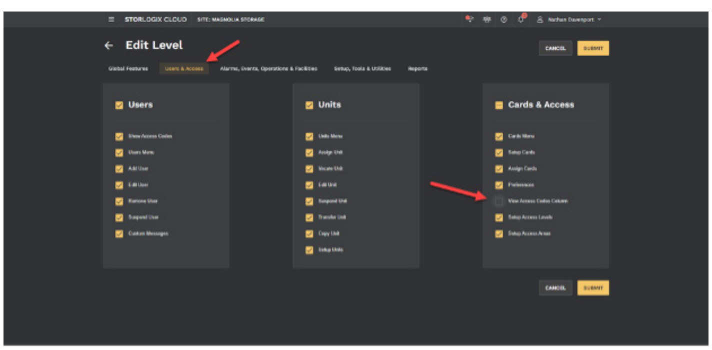
To view a User's Access Code, **Select Users & Access > Codes & Cards.**



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



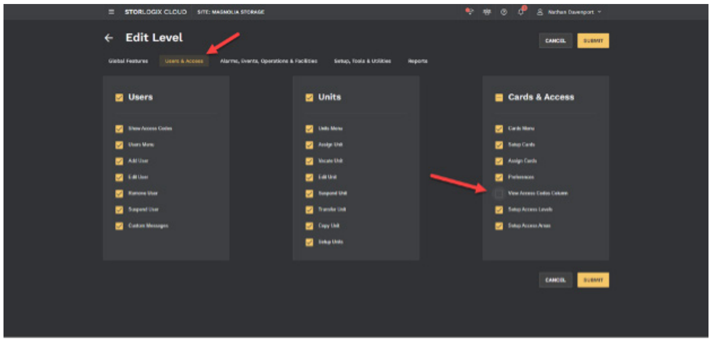
To search for a code assigned to a User, type the **User's name** in the Search Field.
The record should appear with the User's name and Access Code listed.



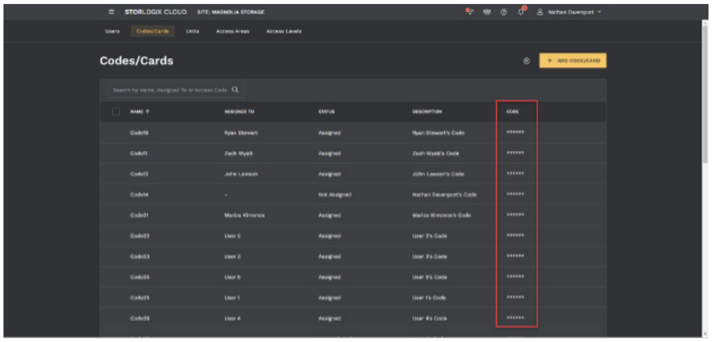
Because this is a cloud solution, it's important to think about hiding this Access Code column for some employees. It may not be wise to display a page with every User and their associated Access Codes.

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** Click the **Security Level** you want to adjust and go to the **Users & Access** tab in the Edit Level.

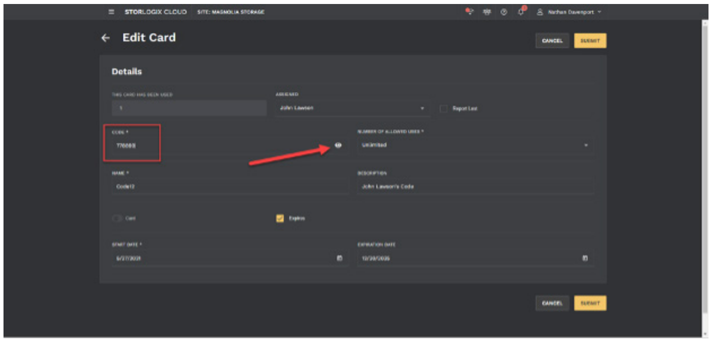
Codes and Cards



The far-right column is called **Cards & Access**. Uncheck the box in that column called View Access Codes Column.

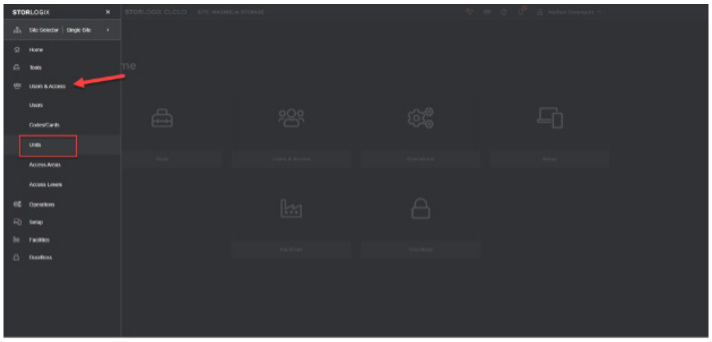


Unchecking this box and clicking **Submit** will prevent any Operator assigned to this Security Level from seeing the numbers in the Access Codes column on the Codes/Cards
Below is an example of when the Codes are hidden.



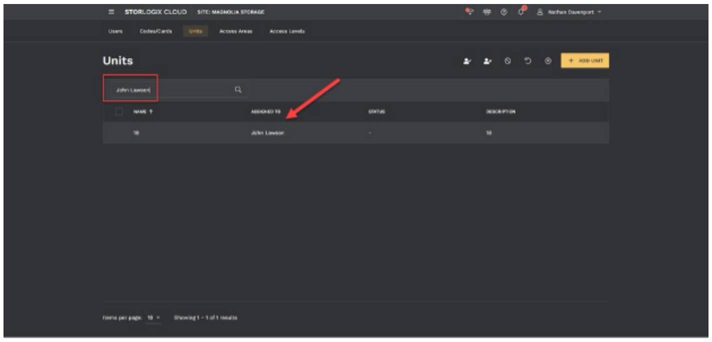
The Access Code column is still visible, but the numbers are blocked out with asterisks.
The Operator can still view a single code at a time by clicking the **Access Code** row and then clicking **Edit**, then the **Eyeball** in the Edit window.

Units

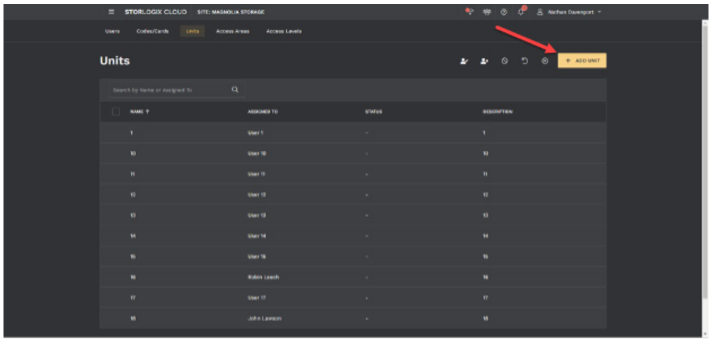


The Units section displays every storage unit in StorLogix Cloud. The names, tenant assigned, status, and description are all listed in the table and can be searched to find specific information quickly. The Units section is only visible in Single-Site mode.

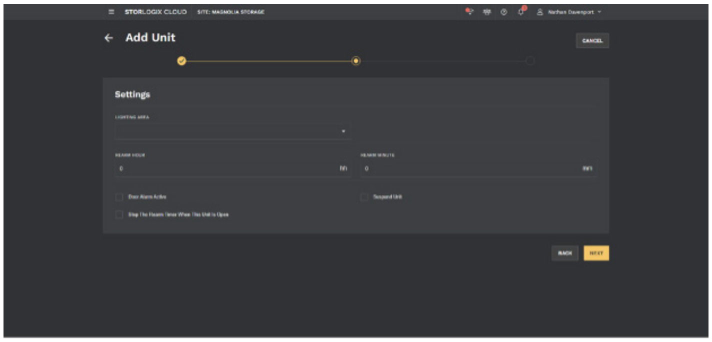
To view Units, **Select Users & Access > Units.**



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.



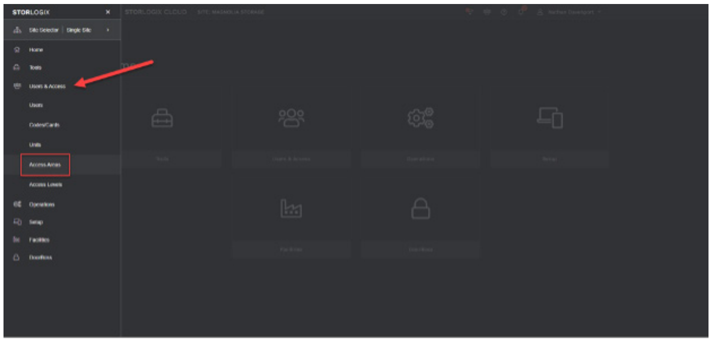
To add a unit manually through StorLogix Cloud rather than your property management software, click **Add Unit.**

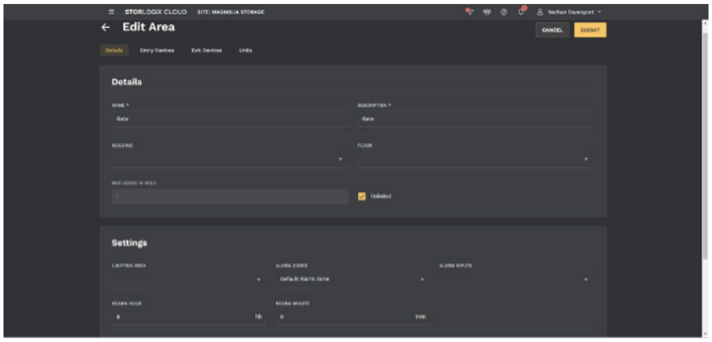


A configuration window will appear where you will enter a Name for the unit and even provide a unit Description if applicable. Be sure to assign it to the appropriate Access Level and Lighting Area. The additional fields and settings apply to units with door alarms. If this unit utilizes door alarms,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

- 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** - 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. - Lighting Areas must already be set up if you are using this function.

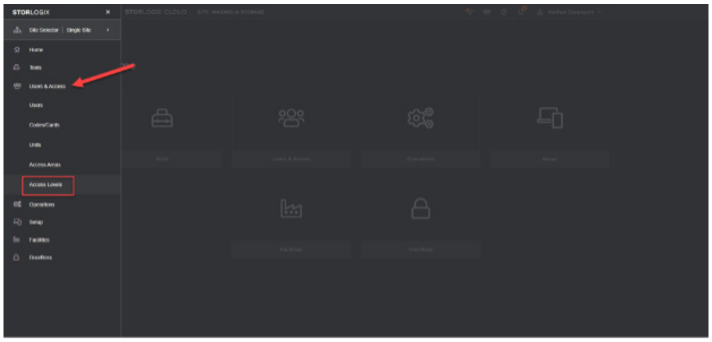
The Maximum # of Users in Area can be set to control how many users can be in an area simultaneously. This is a high-security function and will usually be set to Unlimited – 0.

- **Rearm Wait Time**: (H:M) 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.
  - Select the tab called **Entry Devices** to assign Devices that will enter this Access Area.
  - Select the third tab called **Exit Devices** to select Devices that may exit the Access Area.
  - Select the **Units** tab to assign Units that are in the Access Area.

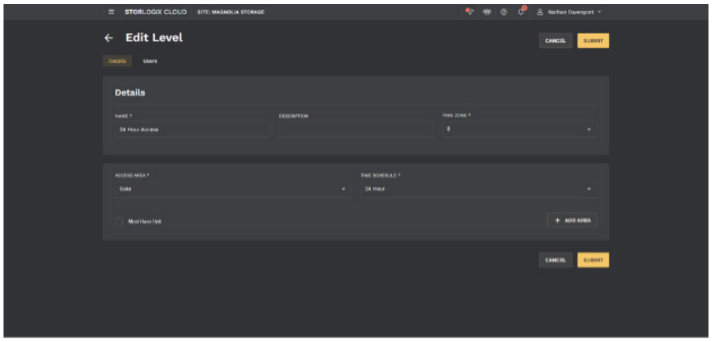
Clicking **Submit** saves your changes.

Access Levels

Access Levels combine Access Areas and Time Schedules to control access for groups of users. This allows a site to easily issue access to a user by assigning them to a specific, pre-defined Access Level without having to select new access privileges each time a new user is entered. Typically, your Access Level assignments will be applied in the property management software and passed automatically to StorLogix Cloud. The Access Level section is only visible in Single-Site mode.



To view Access Levels, **Select Users & Access > Access Level.**



You can edit an Access Level back by 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. Most property management software has from 1 – 8 available choices (although StorLogix Cloud can support up to 250). As you rent a unit to the customer, you select a time zone number. This action transfers to StorLogix Cloud as the Access Level that you want the User to be in.

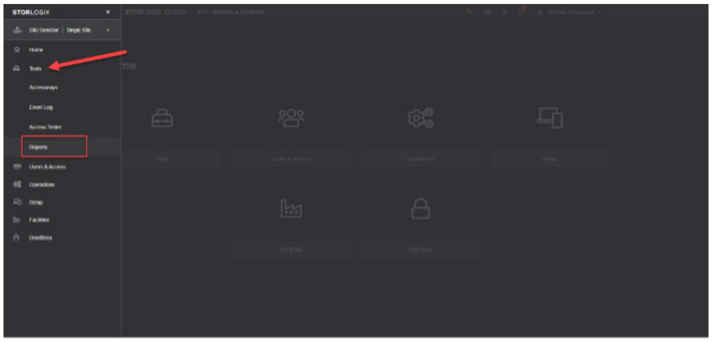
You then select the **Access Area** and **Schedule** you want to combine to create this Access Level.

- You can even add more than one of each if necessary.

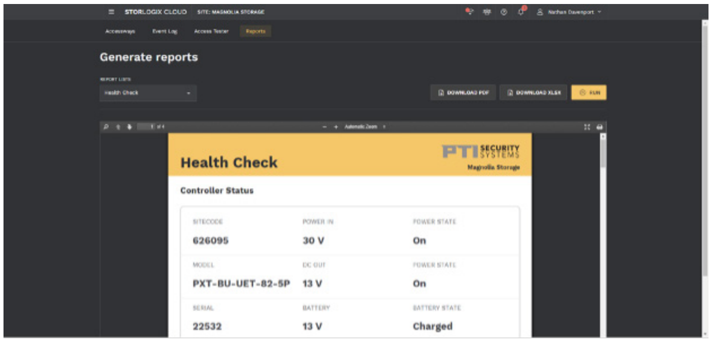
Finally, the **Users** tab shows every user assigned to that Access Level.

- You can manually assign Users here or automatically allow your property management software to pass the information to StorLogix Cloud.

Reports

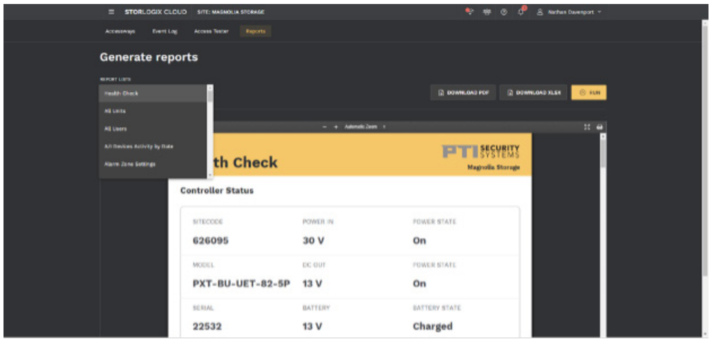


All 40 reports that exist in StorLogix Desktop are now available in StorLogix Cloud. From the Home screen, the Operator can reach the new reporting module with two clicks. Running a new report is as simple as selecting the report from a dropdown and clicking “Run”. These reports are also easy to export 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.

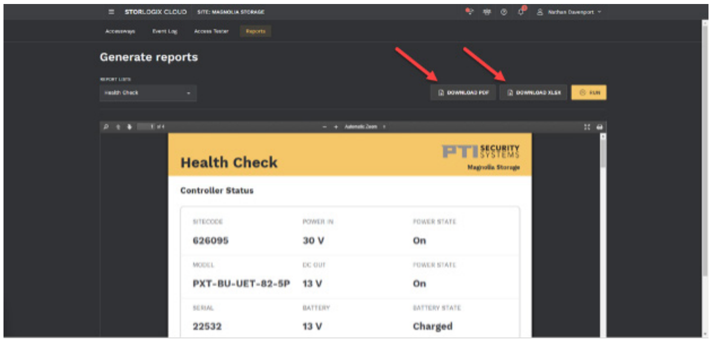


To run a specific report, **Select Tools > Reports**.

The **Health Check** report will always display first. This report combines 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.

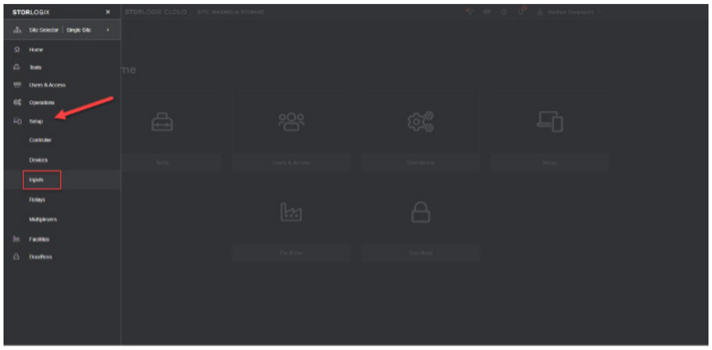


To export / download a report, click on the **Download PDF** button or **Download XLSX** located near the top right (red arrows).

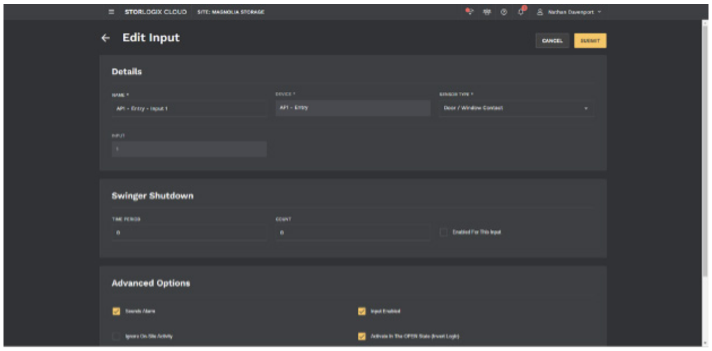
The report will then be available in the bottom left-hand corner of your screen and can be emailed by either saving the document or dragging and dropping it into an open email.

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 relays 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 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.

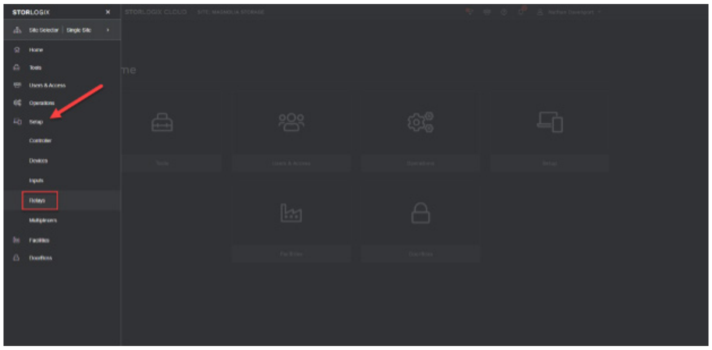
Advanced Options

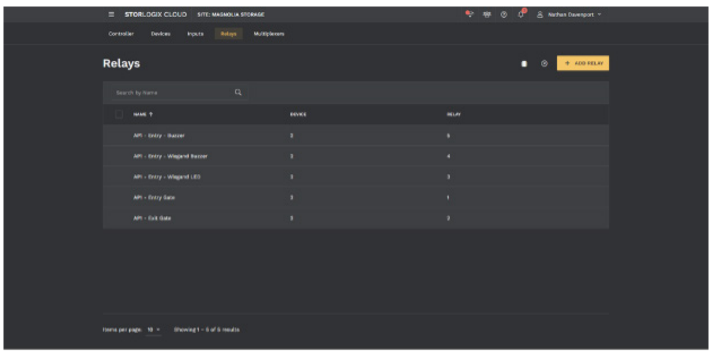
- **Sounds Alarm:** When checked, the Input will alert the software when an alarm condition occurs.
- **Input Enabled**: When checked, the Input will be active.
- **Ignore On-Site Activity:** When checked, the door switch will report only one 'door open' event when a user is logged into the site and 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.

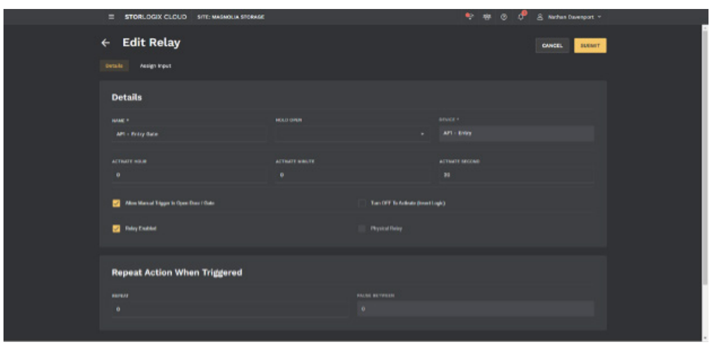
Click **Submit** to save changes.

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.**

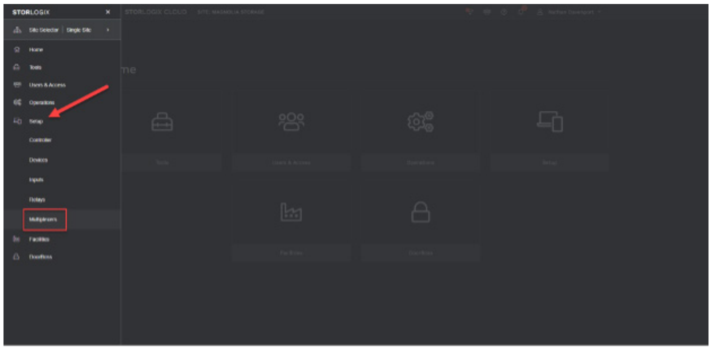
StorLogix Cloud is a smart system that dynamically lists the type and number of inputs and relay depending on the device specification. If devices have already been added to the RS-485 network, you will see the correct number and name of each Relay listed here.

To Edit or View a Relay's settings, click on the **row**.

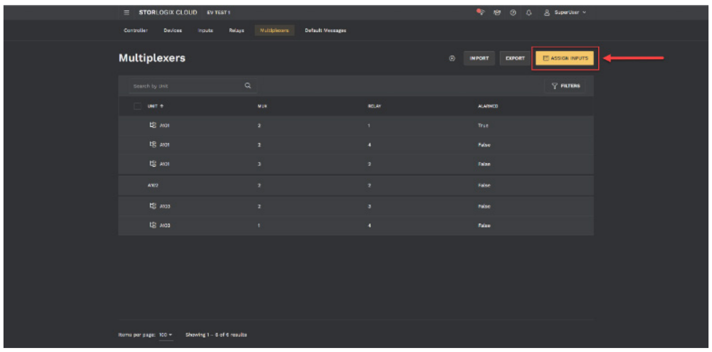
Field Values:

- **Name**
- **Hold Open During Time Schedule** triggers the relay during a specific time schedule.
- 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. If the relay is checked, these will show up in the Accessways section (**Tools > Accessways**).
- **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, the relay will not function.
- **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, 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): Number of seconds/tenths of seconds between each of the repeating instances.

Multiplexers

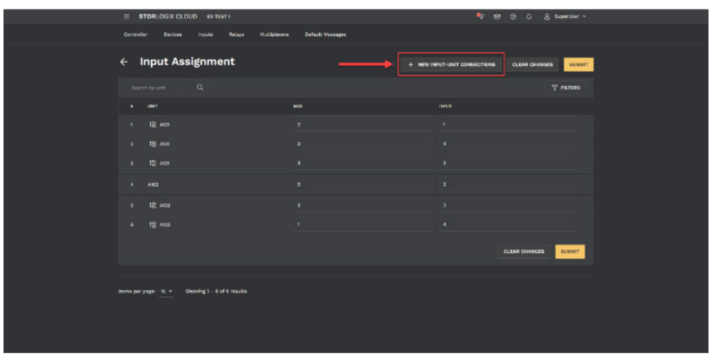


The Door Alarms section links any given input with a physical self-storage unit. Once the input-unit link is created, self-storage units can be armed or disarmed based on whether a tenant is onsite. Traditionally, door sensor inputs are linked to self-storage units to detect if an armed unit has been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

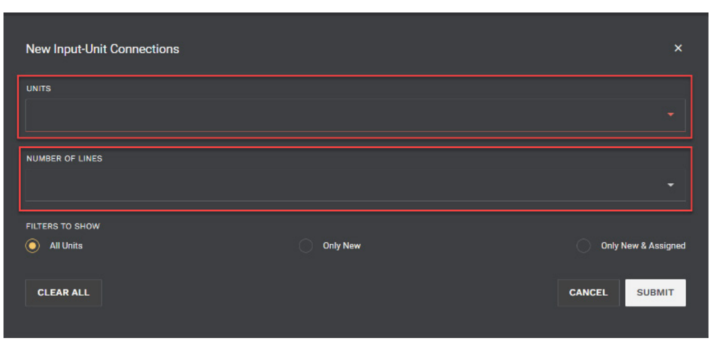


To view Multiplexers, **Select Setup > Multiplexers**.

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

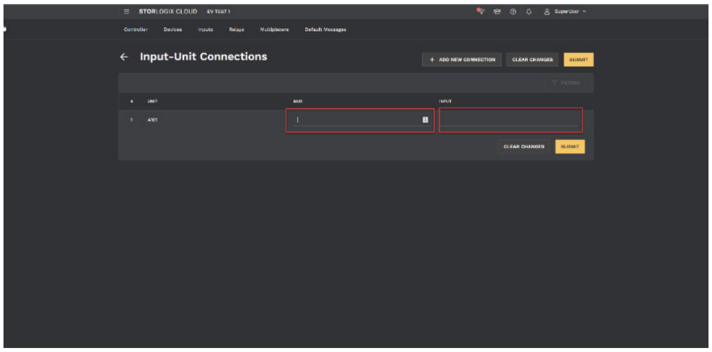


Then, select the **New Input-Unit Connection** button.

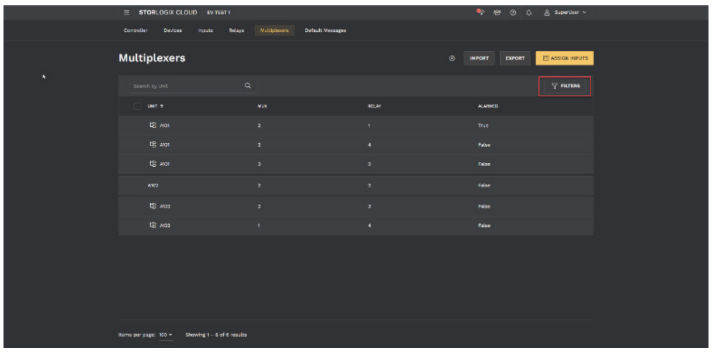


Use the **Units** drop-down menu to select the units fitted with door sensor hardware. Then, select the number of connections to create per unit and select **Submit**.

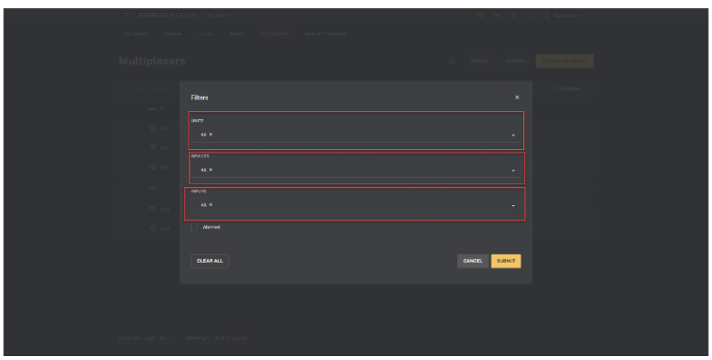
Multiplexers



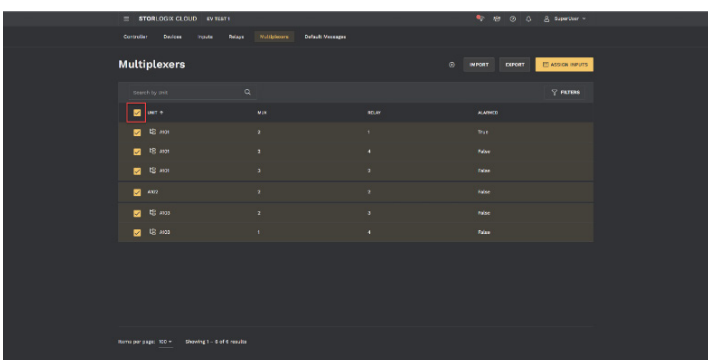
Once connections are created, you'll need to define the device address and input number associated with your unit. Remember, you'll need to select submit for changes to be saved.



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

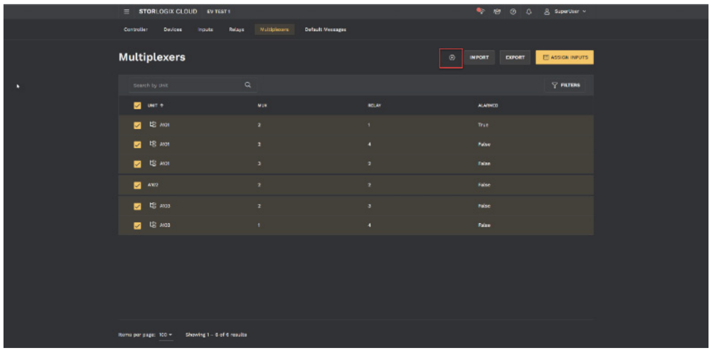


Then, select the appropriate unit, devices, and/or inputs in the filters menu.

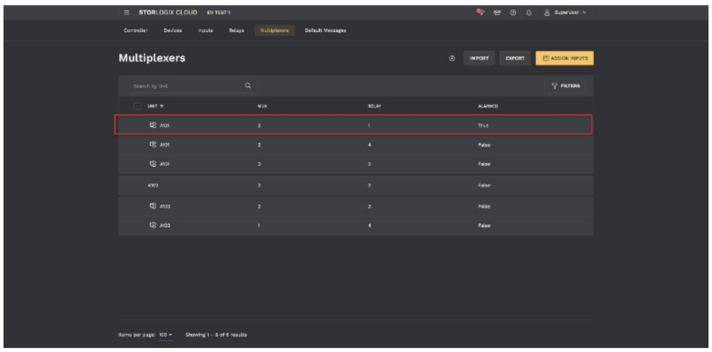


Then, select the checkbox on the top left. This will select all the connections that fit the filter criteria defined in the previous step.
Note: As an alternative, you may also select the individual connection.

Multiplexers

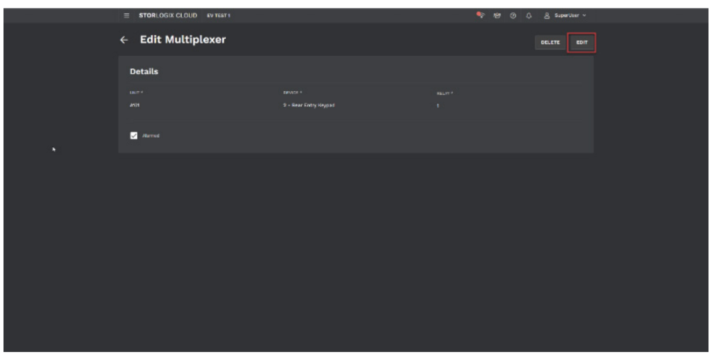


Lastly, select the **Delete** button to finalize your changes.

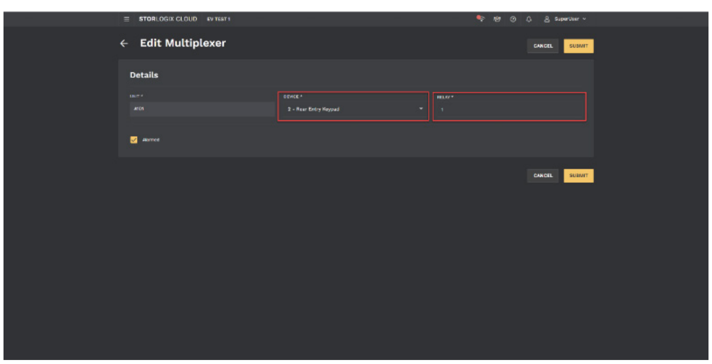


Edit Existing Input-Unit Connection: To edit an existing input unit connection, left-click on the connection entry:

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.

PTI SECURITY SYSTEMS

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SINCE 1979

With StorLogix Cloud, operators can easily customize all of their facility's access areas, review site activity, and monitor zones and alarms from one cloud-based account. Create a world-class operation with the most advanced enterprise access control solution from the trusted industry leader with over 40 years of experience.

Since 1979, PTI Security Systems™ has provided the self-storage industry with proven security and access control systems. Known for our complete and innovative solutions that deliver advanced and cost-effective security systems, self-storage owners and operators can efficiently manage their facility from anywhere, lower operating costs, and enhance the tenant experience.

For more information about PTI Security Systems or StorLogix, please contact a PTI representative or visit our website.

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