Manuals+ — User Manuals Simplified.

ProxessIQ™

**ProxessIQ
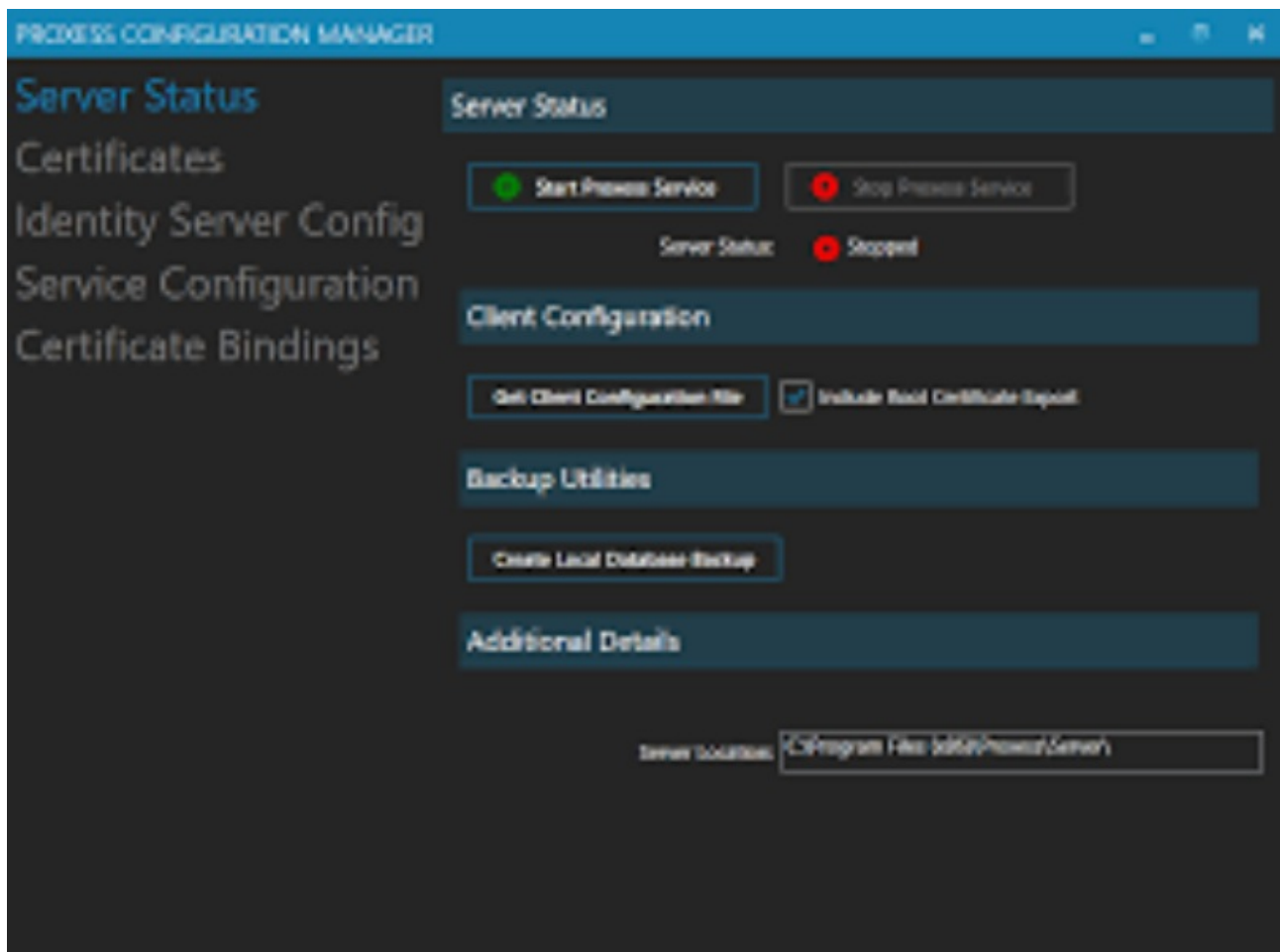Software**

ProxessIQ Software Instruction Manual

Contents

ProxessIQ™

ProxessIQ Software

Equipment & Network Needs

In preparation for the system software download and hardware installation & configuration:

Here are the Computer & other required system components:

- Minimum Computer Spec (for each ProxessIQ server and client), Windows 10+ Pro, Intel 12th Gen 2GHz, 1 USB input, 8GB RAM, 256GB hard drive, 40GB free disk space.
- For Larger Systems; 12 Generation Intel Core i7, 16MB RAM, 512GB HD, .NET 4.8.
- It is strongly recommended to pre-install Microsoft SQL Express 2022 on the Server PC prior to downloading the ProxessIQ software. Consult Proxess for very large systems.
- Network or Internet connection for the PC, depending on the Proxess Sync connection method
- Common WiFi connection to ProxessIQ , or mobile plan with connection to the ProxessIQ network
- ProxessIQ software Download link: For New Installations **www.proxess.com/downloads/current**
- For updates and additional clients **www.proxess.com/downloads/archive**
- USB Enrollment Reader
- Apple or Android Smart Phone
- Proxess Sync Download link
- Router for DNS comms to controllers, or switches for static IP & WiFi comms
- USB-to-Serial cable for custom controller configuration

Ports to be opened for client and IP controller communications:

- TCP 8008-8011 (client-to-server software comms), TCP 8031 (controller comms to the software) & UDP 8032 (controller beaconing)
- Note: The IP Controllers/Gateways may be configured to communicate over ethernet and/or WiFi

Website URLs to be white-listed:

- Bi-directional communications for Mobile Keys: Outbound for initialization and changes and Inbound for audits and events & Notifications: **https://pmcs.proxess.com**
- Dumb" remote synchronization app, which can be enabled & disabled with a click in the software anytime that it is to be used: **https://proxy1.proxess.com**
- The back-up: **https://proxy2.proxess.com**

Email to be white-listed, for Mobile Key & Notifications receipt:

- **DoNotReply@email.Proxess.com**

Firewall Settings

- Please prepare/enable your firewall to accept the following.

This is a summary of the firewall rules that the Proxess software installer attempts to create:

<fire:Firewall Exception Id="Proxess Controller Communication"

- Name="Proxess Controller Communication"
- Protocol="tcp"
- Port="8031″
- Scope="any"
- Ignore Failure="yes"
- Profile="all"/>

<fire:Firewall Exception Id="Proxess Controller Beacon"

- Name="Proxess Controller Beacon"
- Protocol="udp"
- Port="8032″
- Scope="local Subnet"
- Ignore Failure="yes"
- Profile="all"/>

<fire:Firewall ExceptionId="Proxess Server Secure Communication"

- Name="Proxess Server Secure Communication"
- Protocol="tcp"

- Port="8009″

- Scope="any"

- Ignore Failure="yes"

- Profile="all"/>

<fire:Firewall Exception Id="Proxess Server Open Communication"

- Name="Proxess Server Open Communication"

- Protocol="tcp"

- Port="8011″

- Scope="any"

- Ignore Failure="yes"

- Profile="all"/>

**<fire:Firewall ExceptionId="Proxess Identity Server"**

- Name="Proxess Identity Server"

- Protocol="tcp"

- Port="8008″

- Scope="any"

- Ignore Failure="yes"

- Profile="all"/>

SOFTWARE DOWNLOAD & INSTALLATION

**Which software do I download for a Basic system?**
From the links provided at **www.Proxess.com/Downloads** if your system is described on this page, then on the computer that will be your primary (the "server") you will download and install "Proxess-Server-Installer-LocalDB-Bundle.exe". On all other computers (unlimited), you will only install "Proxess-Installer-Client.msi" Follow the instructions in this section if this describes your system.

There will be only 1 (one) computer (laptop or desktop) used for configuration and data entry. OR There is 1 (one) main computer (laptop or desktop) used for data entry and one (1) or more additional computers may be used for configuration and data entry, either now or in the future.
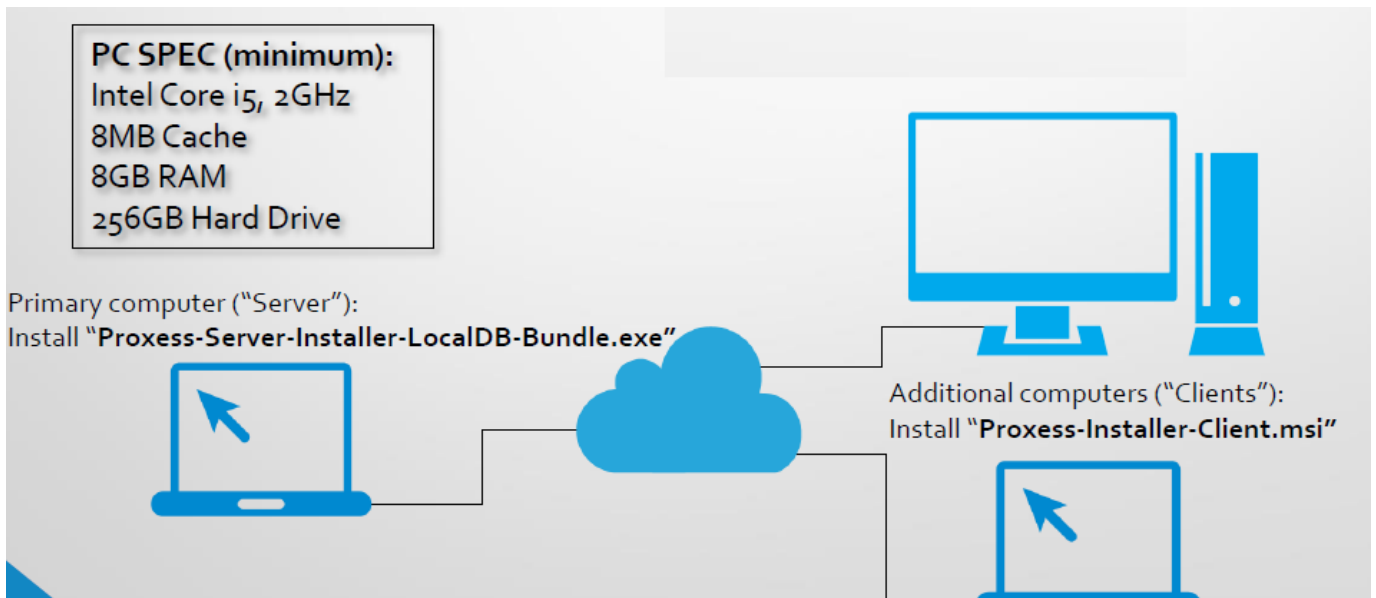
PC SPEC (minimum):
Intel Core i5, 2GHz
8MB Cache
8GB RAM
256GB Hard Drive

Primary computer ("Server"):
Install "Proxess-Server-Installer-LocalDB-Bundle.exe"

Additional computers ("Clients"):
Install "Proxess-Installer-Client.msi"

Primary computer ("Server"): Install "Proxess-Server-Installer-LocalDB-Bundle.exe" Additional computers ("Clients"): Install "Proxess-Installer-Client.msi" Locate the download link provided at **www.Proxess.com/Downloads** or which has been emailed or otherwise provided to you by the Proxess support staff or sales team. For basic and small-to-medium sized systems that choose to use the Proxess built-in "LocalDB" database (a Microsoft database product), you will install the file from the top section (in the version depicted below, 1.5.2.1) "ProxessIQ_Server_Installer_LocalDB_Bundle.exe".
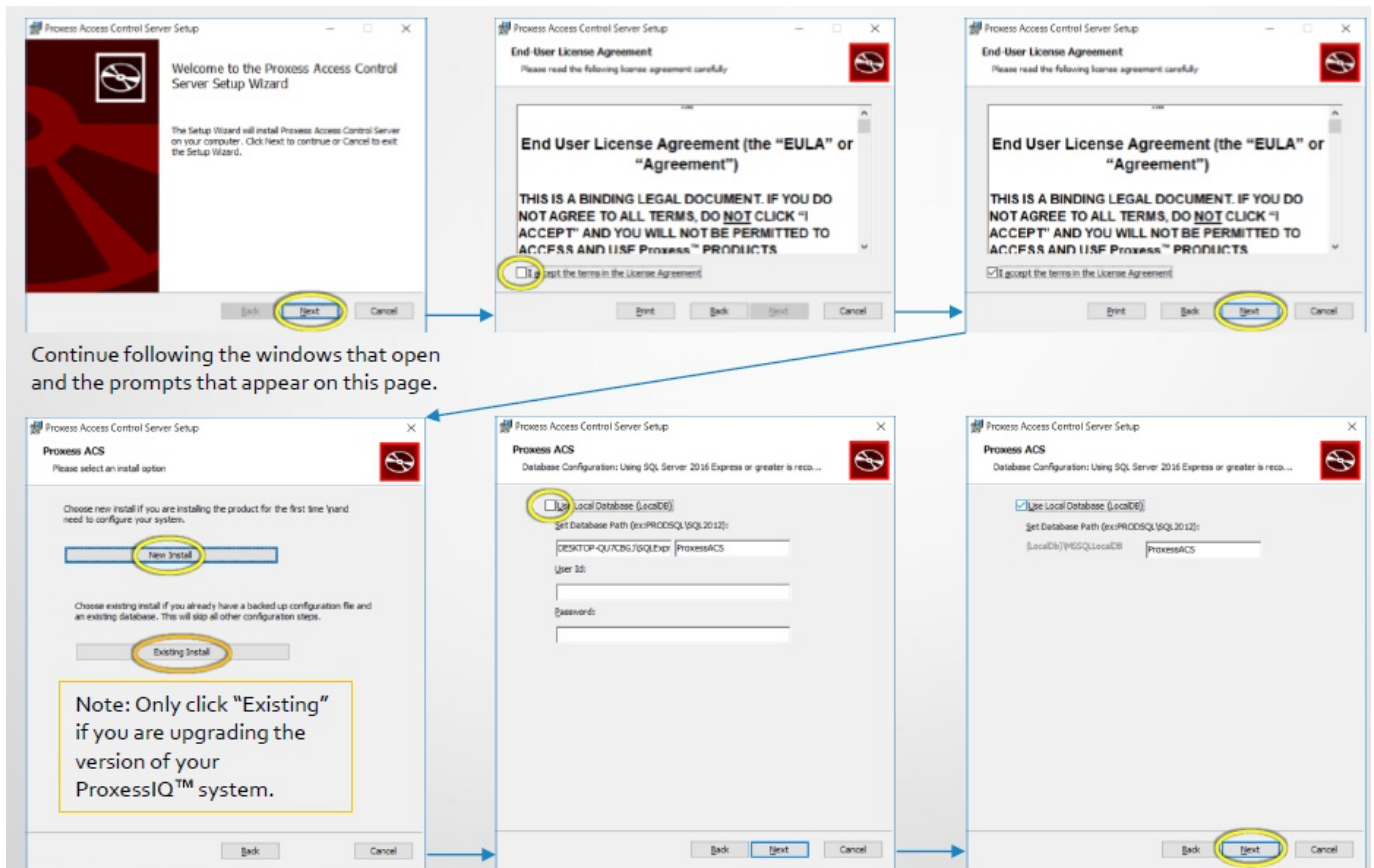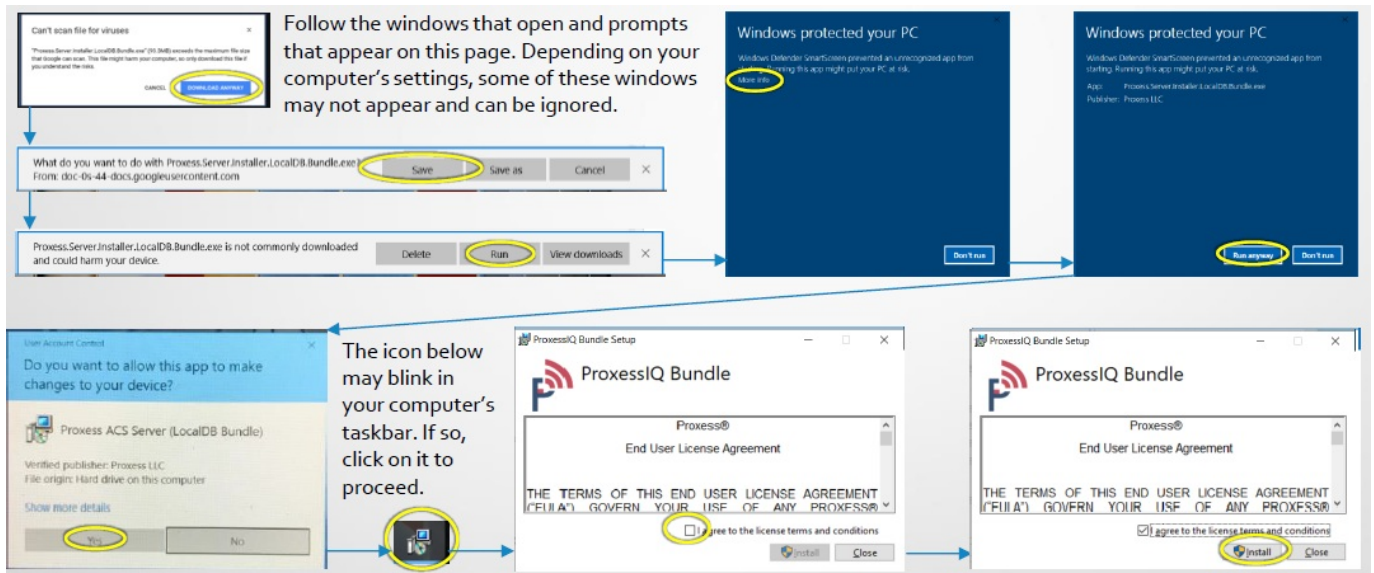
This file will install both the server and client (system programming user-interface) applications onto the computer. This "bundle" can only be installed on one computer per system, but the Client download files can be loaded onto several other computers, which will be used as administration workstations. Click on "Proxess-Server-Installer-LocalDB-Bundle.exe" and, if prompted, click on "Download" on the screen that opens.
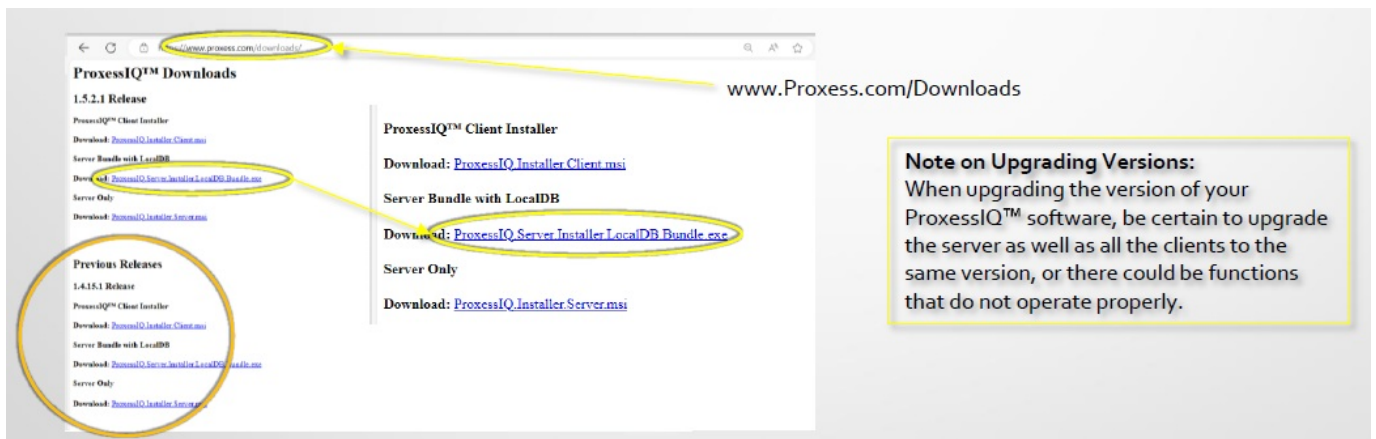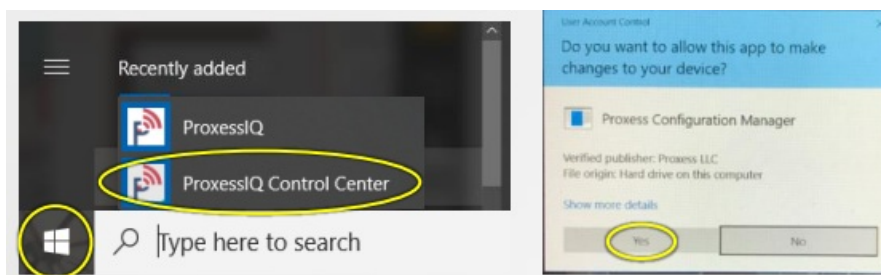

Alternatively, for systems where the server computer will Not be used as an administrative terminal, click on the 1.5.x Server file (instead of the Bundle). All the subsequent administrative workstations will have the Client file installed, as discussed above.

Per the previous page, click on "Proxess-Server-Installer-LocalDB-Bundle.exe" to begin the file download. There are 3 automated wizards that will guide you through each the download bundle, the server installation and the client installations. At the completion of all 3, the Server program, ProxessIQ Control Center will launch.

**This is the Download Bundle installation wizard:**

Follow the windows that open and prompts that appear on this page. Depending on your computer's settings, some of these windows may not appear and can be ignored.

The icon below may blink in your computer's taskbar. If so, click on it to proceed.

Continue following the windows that open and the prompts that appear on this page.

Note: Only click "Existing" if you are upgrading the version of your ProxessIQ™ system.

Initializing the Server

Both the "Server" and "Client" portions of the software have now been installed on your computer. It is good practice to follow the steps on this page, which will assure that the essential Server services are running on this computer. Press the Windows icon on the keyboard or click on the Windows icon on the left side of the Taskbar on the bottom of your screen. Locate and click on the "ProxessIQ Control Center", which will be in both the "Recently Added" section of the pop-up list of programs, as well as under the "P" section down below. If prompted with the window requesting to make changes to your computer, click "Yes".
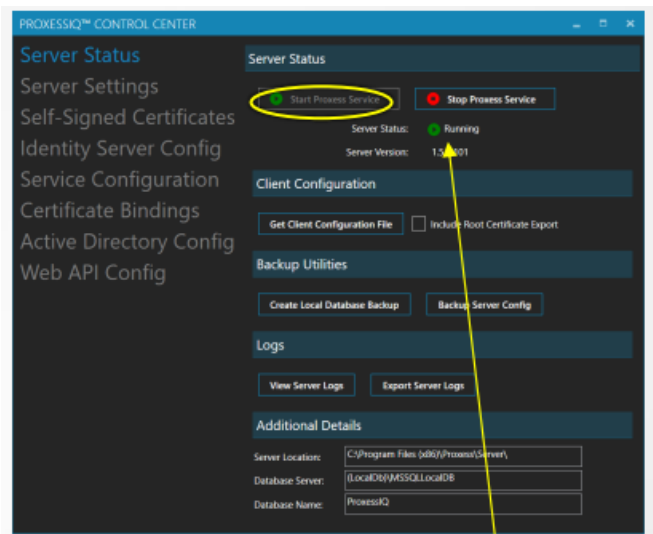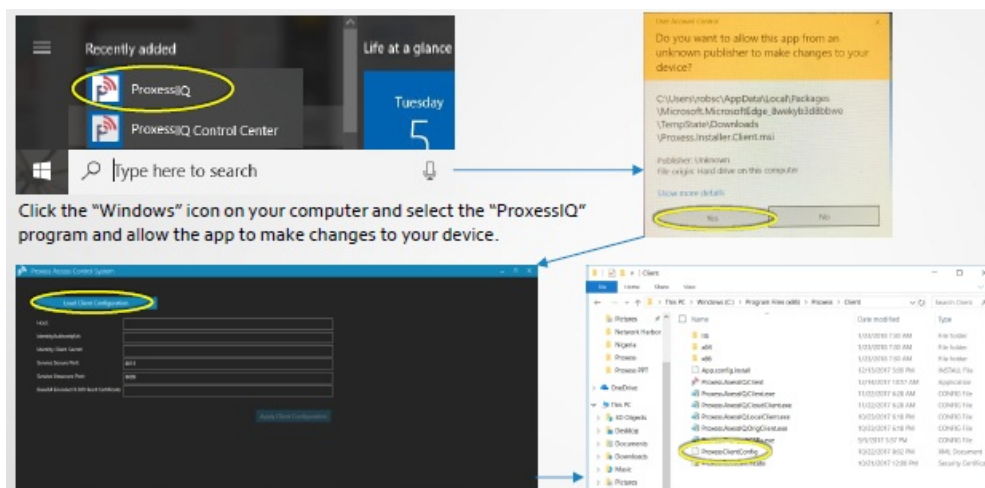

The above screen will open. If the Server Status is shown as "Stopped" then click on "Start Proxess Services".
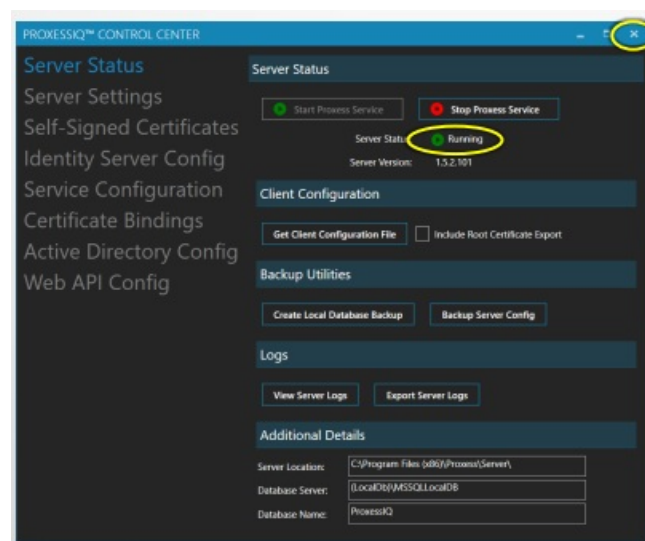
Usually within several seconds (and upwards of about a minute) after clicking "Start Proxess Services" the Server Status will change to "Running". We will now proceed to initiate the software.

Click the "Get Client Configuration File" button. On the "Save As" screen, navigate to the following (preferable) folder location to save the file in: "This PC \ Windows (C) \ Program Files (x86) \ Proxess \ Client". Click the "Save" button. Click on the "x" on the top right of the ProxessIQ Control Center window to close the application.

Initializing the Client

Click the "Windows" icon on your computer and select the "ProxessIQ" program and allow the app to make changes to your device.

NOTE: Other than as stated here, do not make any changes to these screens. Click the "Load Client Configuration" button on the first screen. If you have not yet pasted it into the Client folder, you will be asked to search for the Configuration file, which may be found in the file folder you saved it in. Click on it.

On the next screen (below), click the "Apply Client Configuration" button. The Login screen will open. Enter "administrator" and "proxess".
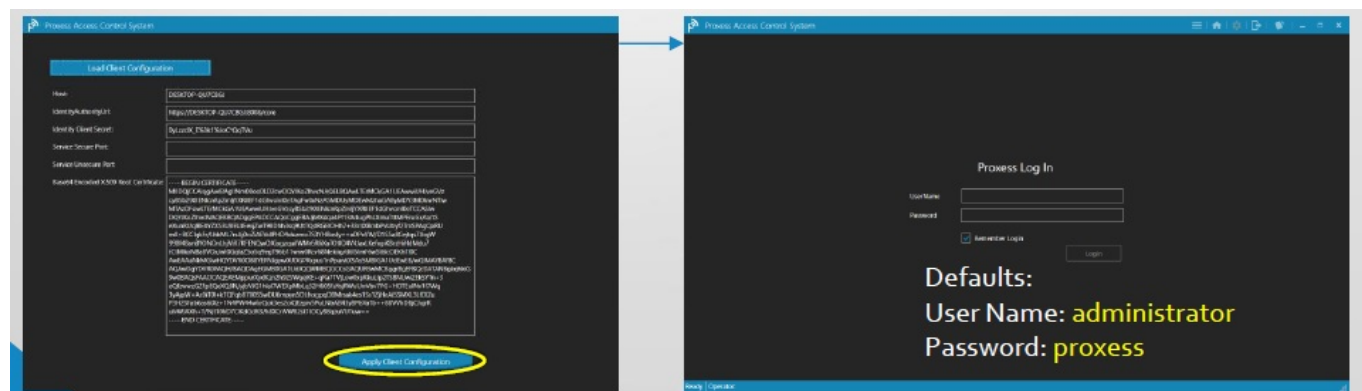
You will now be prompted to change your password, which is strongly recommended, but not required. One option is to get familiar with the software and configure it and get a second administrator trained before changing the default password. Please do not take either of these options lightly and be certain to SAVE YOUR PASSWORD !! The ProxessIQ software will now open.
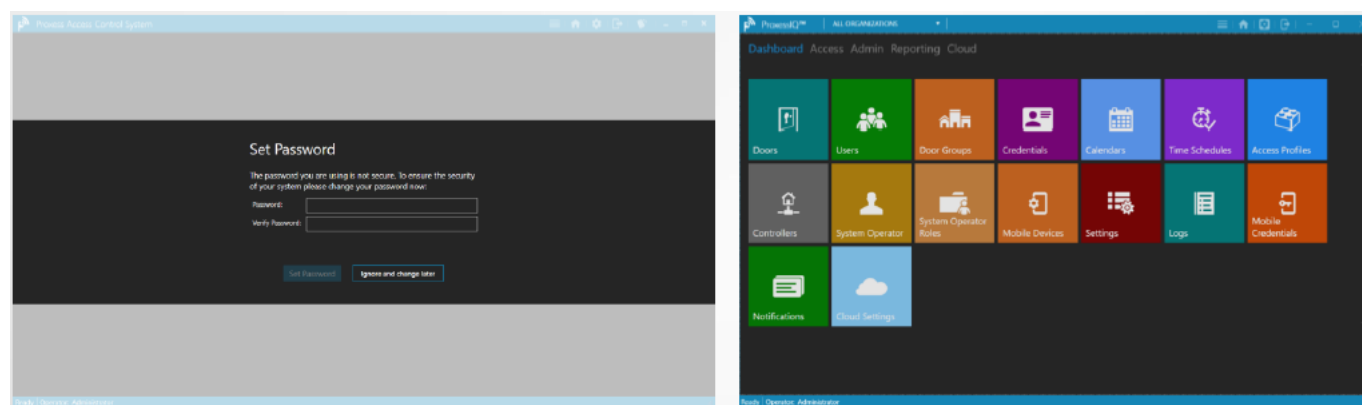
After installing the ProxessIQ software, you may add the icon to your taskbar and\or desktop.

The following section will guide you through adding a License Key for ProxessIQ and for Mobile Credentials/Keys.

Assuring Software Clients Connect to the Server

Resolving Local Host Names

- When using the computer name for a server's host name, any client trying to access the server will need to be able to resolve that host name. In a local network environment this happens automatically through either local DNS (typically in a domain environment) or through NetBIOS name resolution. If you are attempting to connect to the server's host name outside of your local network environment, these name resolution methods will not be available. The simplest approach for creating this mapping is to create an entry for the host name in the local host file of the client computer that is attempting to reach the server.

The Windows Host file is located at c:\Windows\System32\Drivers\etc\hosts. To make edits to this file, you will need to open the file with a simple text editor (like Notepad) with administrator privileges (Right-Click and select Run as administrator). The host file does not have an extension (.txt) so you will need to select "All Files (*.*)" in the file Open dialog. Once the host file is open, you will need to create a new line that contains the routable IP address followed by the computers host name. Assuming this is outside the internal network, this will need to be the public IP with proper routing/NAT rules setup. For example, if your public IP is "123.456.0.100" and your server's host name is "myservername", the host file entry should look like this: 123.456.0.1 my server sname A robust alternative to this is to use a registered domain name with a public DNS record for your server's host name.

NAT/Port Forwarding
To connect to a server inside a local network from outside of the local network, you will need to set up the appropriate NAT or Port Forwarding rules on your gateway /firewall. These rules need to provide a path from the public IP (provided by your ISP) to the internal network IP for all ports required for communication to the AxessIQ server. The default ports that are used for this communication are 8008, 8009, and 8011. Setting up NAT/Port Forwarding rules will be specific to your gateway manufacture. Please refer to the manufactures documentation for setting this up.

Example documentation for setting up port forwarding on a Comcast gateway can be found here:
https://www.xfinity.com/support/articles/port-forwarding-xfinity-wireless-gateway

Assuring Software Clients Connect to the Server

When the Computer Host Name Changes
When the Host Name is changed (on purpose or accidentally…) you will need to:

- Edit all the values in the ProxessIQ Configuration File, changing the old to the new name
- Reload the config file, or change it manually in the "Load Client Config File" screen
- In ProxessIQ Control Center, change the old to the new Host Name in the Certificate Bindings
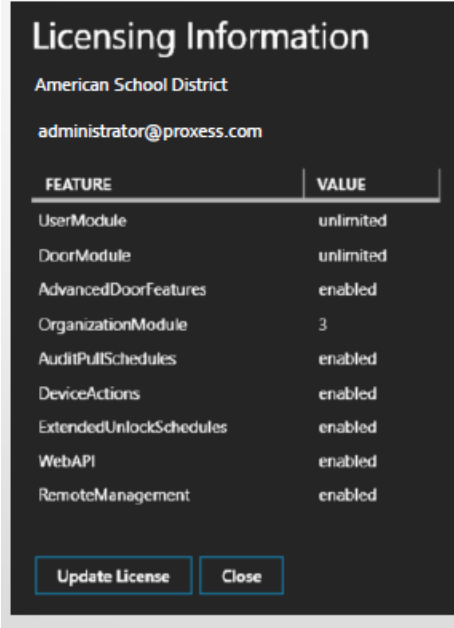
When a computer changes from a Wired to a WiFi connection:

- When a computer changes from a wired to a wireless (WiFi) connection, be certain to delete the localhost IP address listen in C://Windows/System32/drivers/etc/hosts
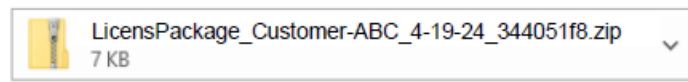
Software Licenses for:

ProxessIQ & Mobile Credentials/Keys

The following are the separately licensable modules and features. Please see your RSM or contact the Proxess HQ

When prompted to provide a license file in a ProxessIQ system and in order to add mobile credentials/keys to your system, a Proxess employee or authorized dealer will email a license package, as a .zip file.
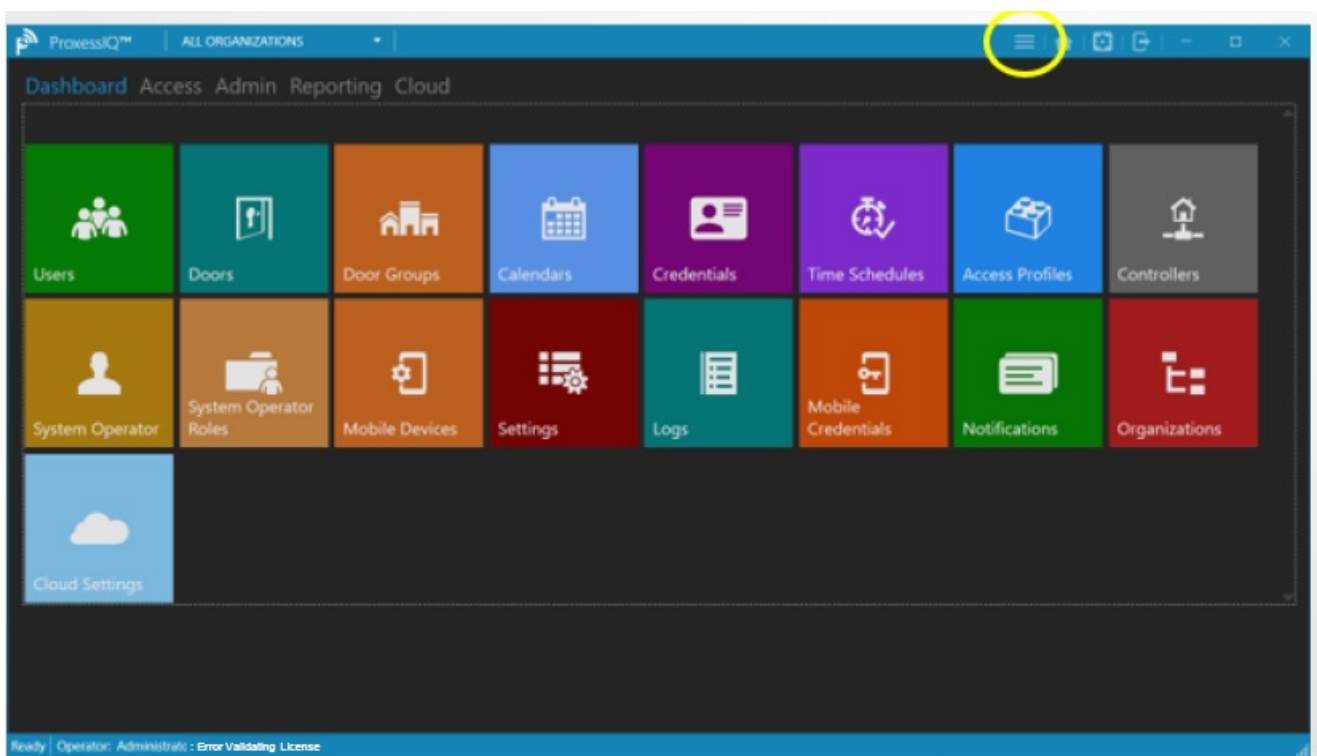

- The following instructions will show you how to download the .zip file and Extract and Save both files within it and note that location.
- The first file we will address is the .lic validation and feature license for the ProxessIQ software.
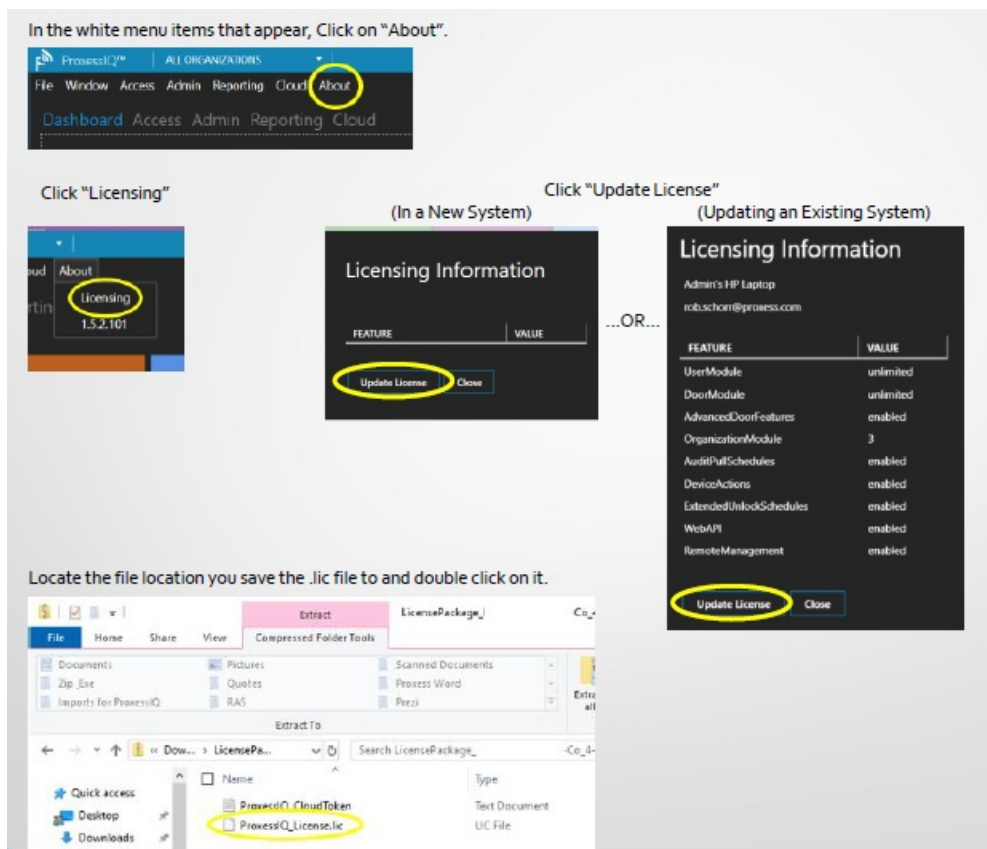
This file may be added when prompted upon your login to the software, via this notification on the bottom bar of the software:
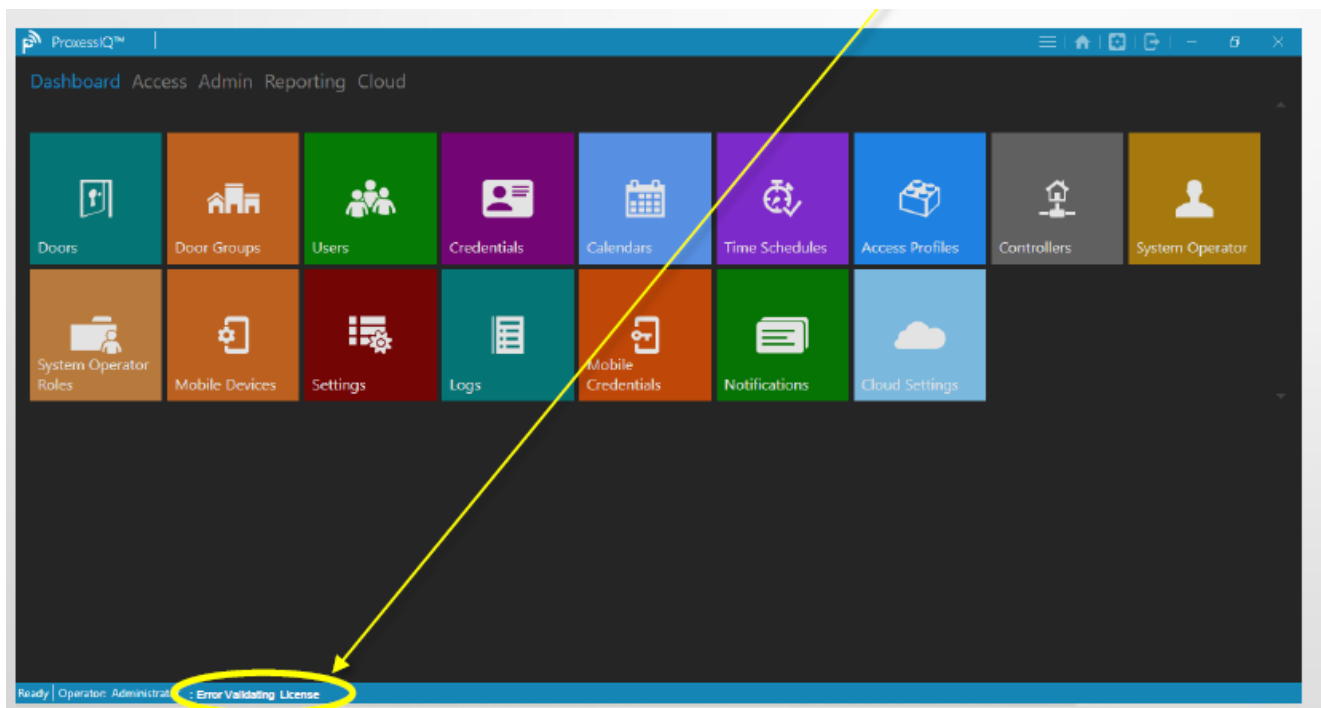
- Install the license file using the following instructions.
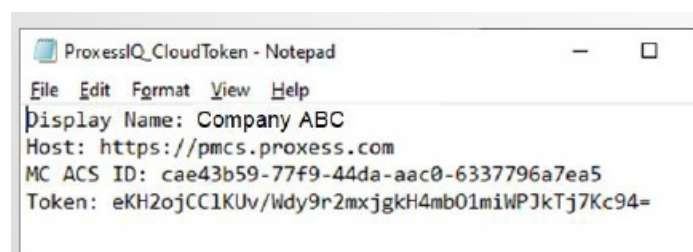- Click on the Menu ("Hamburger") button in the top bar of the software.

- In the white menu items that appear, Click on "About".

In the white menu items that appear, Click on "About".

Click "Licensing"

Click "Update License"
(In a New System)

(Updating an Existing System)

Locate the file location you save the .lic file to and double click on it.

- Locate the file location you save the .lic file to and double click on it.
- Your ProxessIQ software will now be licensed with the attributes that were purchased and you can return to the program to continue programming your system.
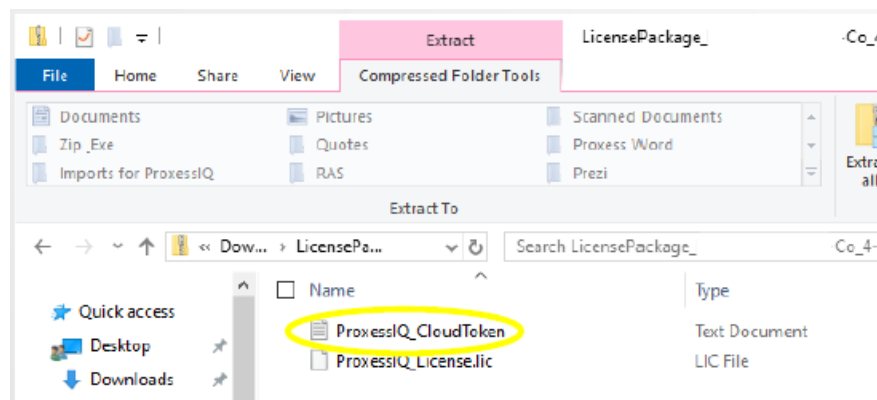

- The second file you extracted from the .zip will provide you information to enable mobile credential operation. Locate the file location you save the .lic file to and double click on "ProxessIQ_CloudToken".

ProxessIQ_CloudToken - Notepad

File Edit Format View Help

Display Name: Company ABC
Host: https://pmcs.proxess.com
MC ACS ID: cae43b59-77f9-44da-aac0-6337796a7ea5
Token: eKH2ojCC1KUv/Wdy9r2mxjgkH4mbO1miWPJkTj7Kc94=

- Allow this file to open in Notepad, or a similar program.
- Once the data is entered, as explained below, your system will be provisioned with the number of mobile credentials your customer has purchased.
- Future mobile credential purchases will simply be added by the Proxess support team in the cloud and applied to your system, without further action by the ProxessIQ Operator.
- From the ProxessIQ dashboard, click on Cloud Settings .
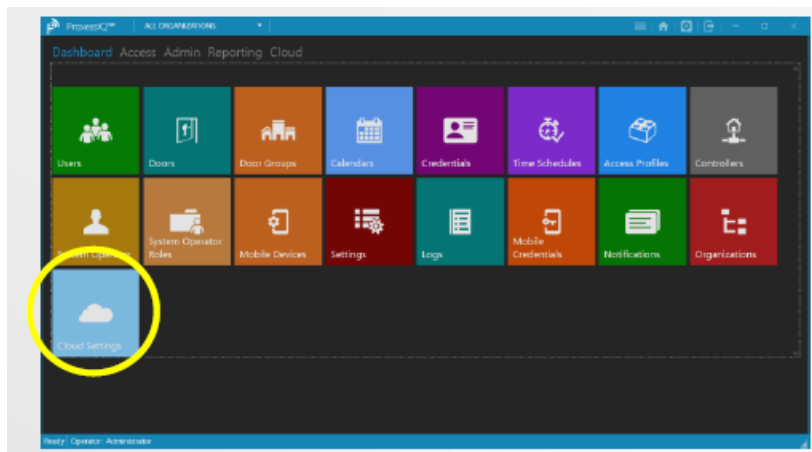
- Check the "Enabled" box.
- Copy each line of text file (including all the special characters, but not any extra spaces) and paste them into the appropriate fields.
- Leave the "Forced Online" box checked.
- Then click "Save and Synchronize" until "Synchronized" is shown.
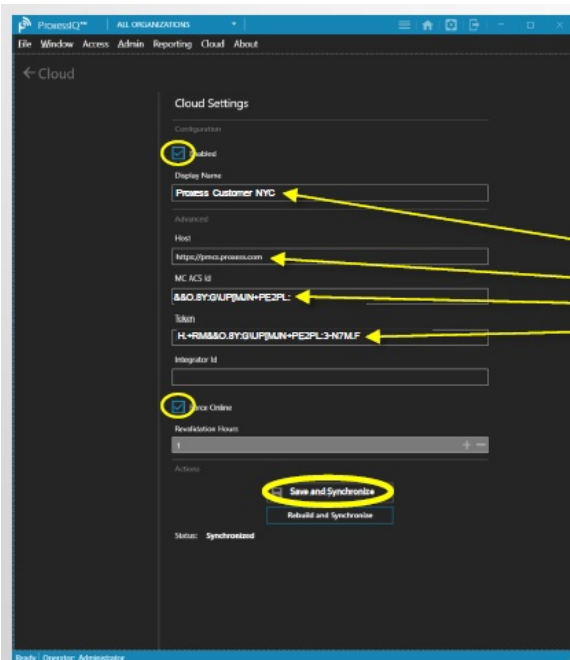
Check the "Enabled" box.
Copy each line of text file (including all the special characters, but not any extra spaces) and paste them into the appropriate fields.
Leave the "Forced Online" box checked.
Then click "Save and Synchronize" until "Synchronized" is shown.
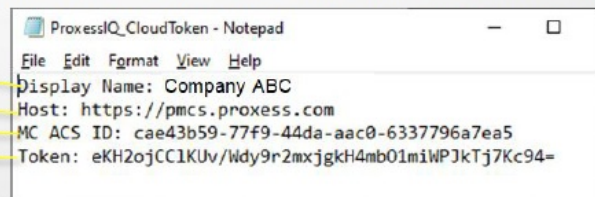
- You may now click the back arrow or the Home button and resume your system programming.

FAQ

- **Which software should I download for a Basic system?**
  If your system matches those described on **www.Proxess.com/Downloads,** download Proxess-Server-Installer-LocalDB-Bundle.exe for the primary server and Proxess-Installer-Client.msi for other client computers.
- **What are the minimum PC specifications required?**
  The minimum PC specifications are Intel Core i5, 2GHz processor, 8GB RAM, and a 256GB Hard Drive.

Documents / Resources

Proxess ProxessIQ Software [pdf] Instruction Manual
Proxess-Server-Installer-LocalDB-Bundle.exe, Proxess-Installer-Client.msi, ProxessIQ Software , Software

References

- [**User Manual**](#)