

proxy

User Manual

Proxy Mobile Access Manager

www.proxy.com | support@proxy.com

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Introduction

The Proxy Mobile Access Manager is accessible on the web via any device type and allows administrators to perform actions such as adding and removing users and groups as well as setting permissions.

Through the web interface, you can:

Manage Organizations

- Create / add an organization(s)
- Edit an organization(s) name
- Set default organization RFID credentials
- Assign organization administrators
- Edit your personal account first and last name
- Change your personal account photo
- Switch between multiple organizations that you manage

Manage Users

- Invite colleagues
- Resend invitation
- Search for users
- View a summary of users in your organization
- Remove user from organization
- Set ability to use default org credentials

Manage Groups

- Create new group
- Add members to group(s)
- Create new permissions for your access point: add and remove restrictions
- Set permissions based on specific access points and time periods (for example, create a “Cleaning Crew” group that is permitted access to the front door on Mondays and Wednesdays from 5 pm - 7 pm)
- Create, remove, and delegate group admin

Manage Access Points

- Create new access points - set credentials, set time zone, change access point settings such as setting auto unlock and the access range
- Assign a photo for the access point
- Assign a group to an access point
- Assign people to the access point
- Create, remove and delegate access point admins
- View access points and associate logs tracking user activity

Setting Up the Mobile Access Manager

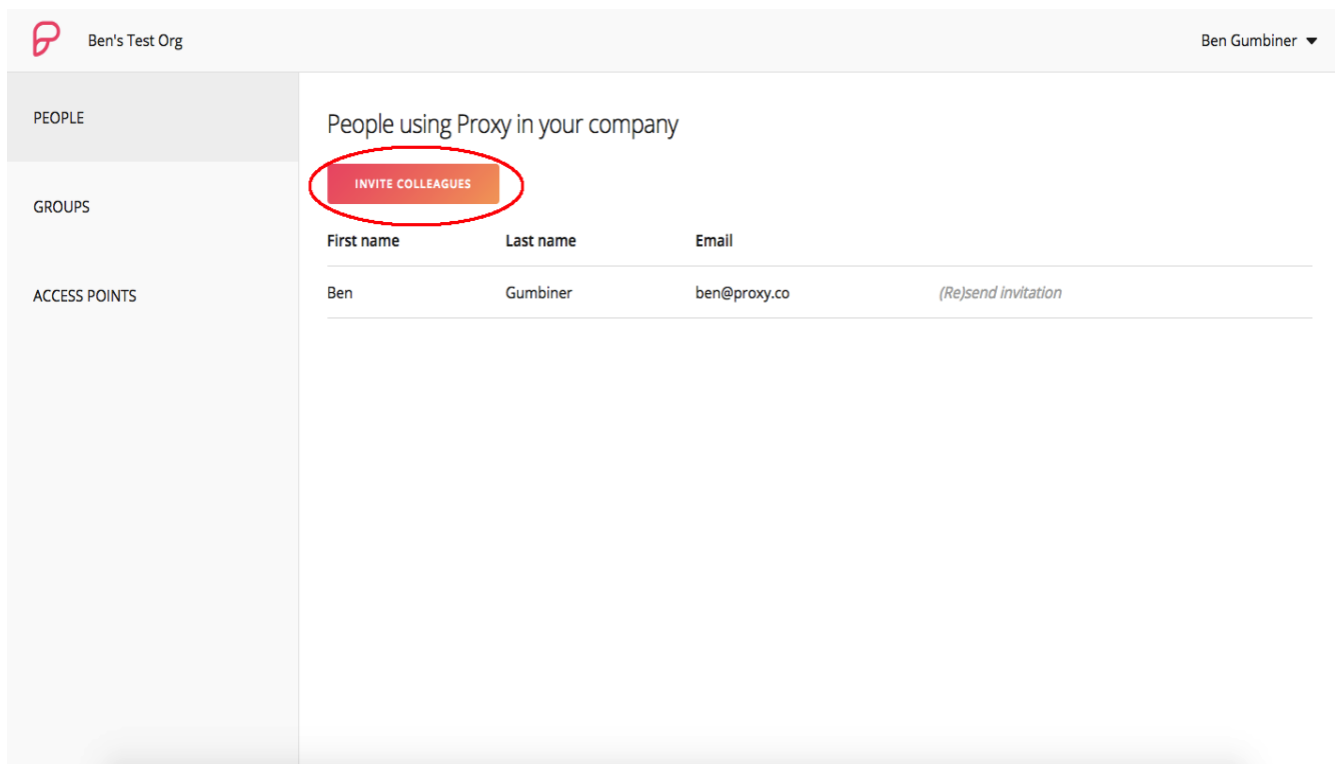
Initial Setup - Mobile Access Manager

1. Go to <https://manage.proxy.co/login/>.
2. Click on the “Don’t Have An Account Yet?” link and follow the instructions to create an account.

Using the Mobile Access Manager

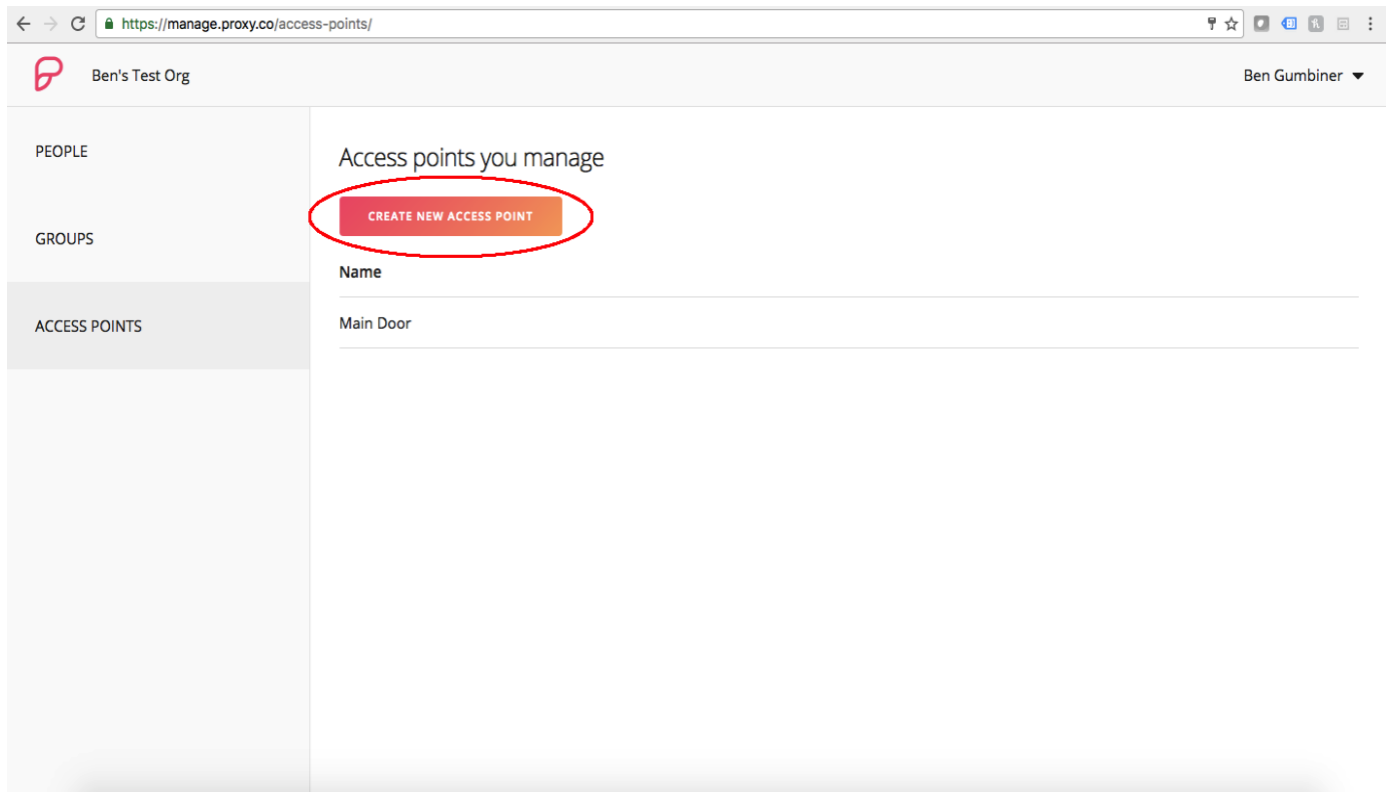
Adding Users to the Org

1. In the PEOPLE tab, click the “Invite Colleagues” button. (See Image)
2. Once a colleague is invited, he or she will receive an email with instructions to download and install the mobile app if that option is checked (you can always send the invite email later if option is unchecked).
3. Follow the instructions to add people by email addresses or via CSV import.



Creating New Access Points

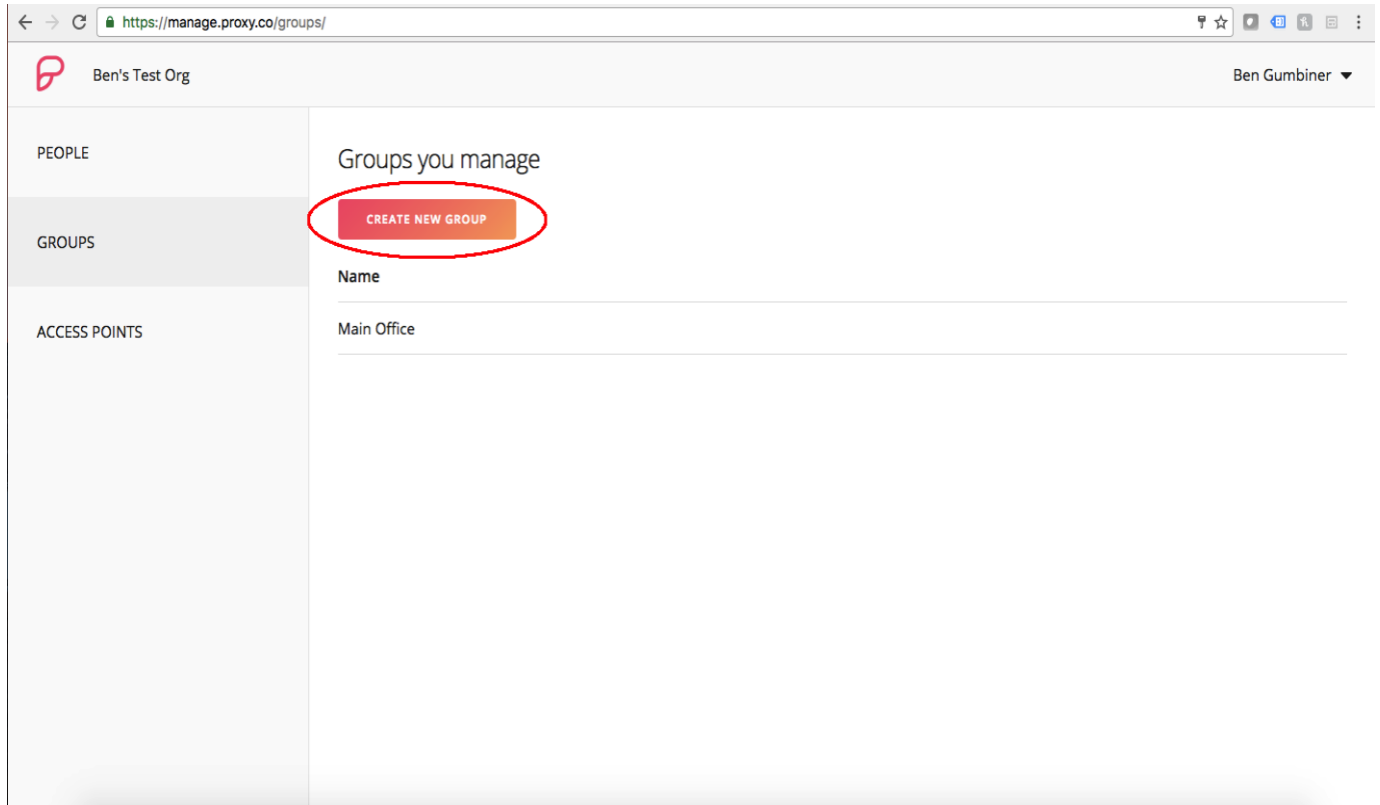
1. Select "ACCESS POINTS" from the left panel and then the "Create New Access Point" button.



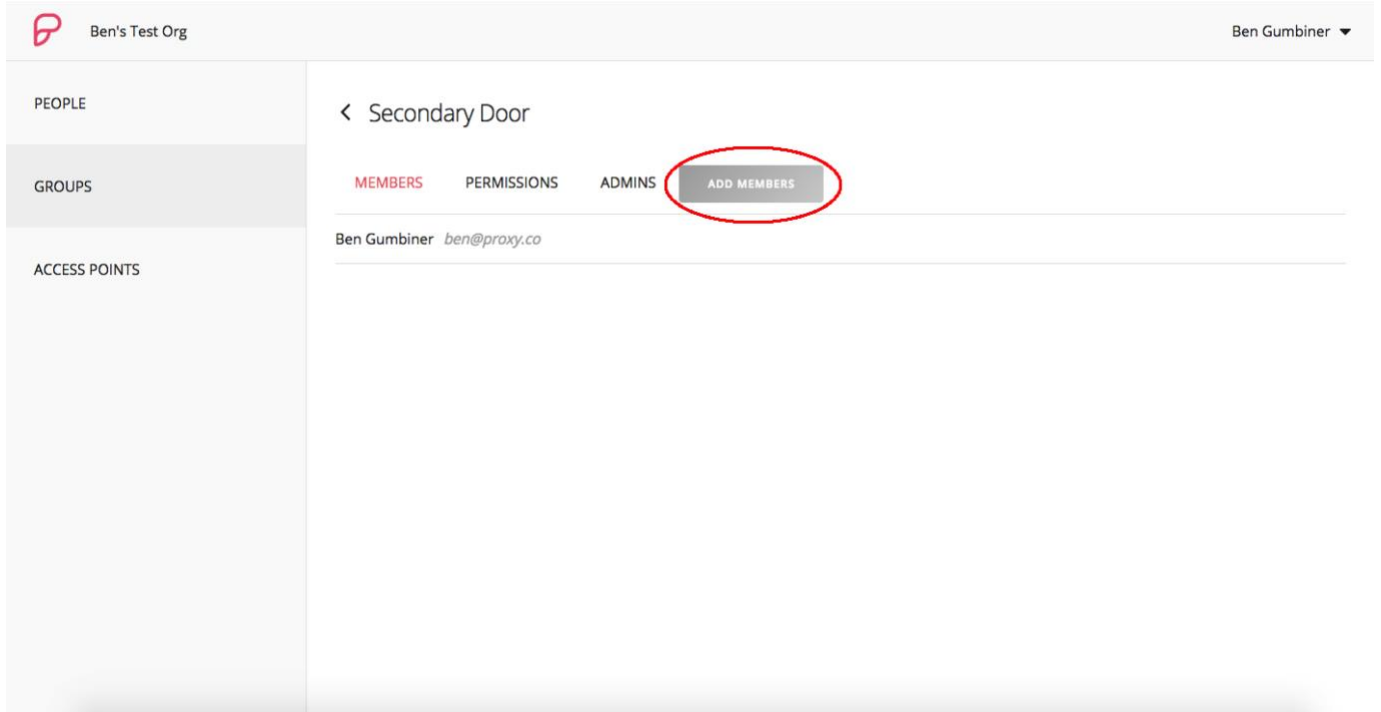
2. Enter a name to describe your point of access, the Device ID provided to you for your Proxy Mobile Reader, your desired range, and a picture (typically a company logo and/or visual depiction of the door).

Create and Manage Groups

1. Select "GROUPS" from the left panel and then "Create New Group" (or use an existing Group if one has already been created).



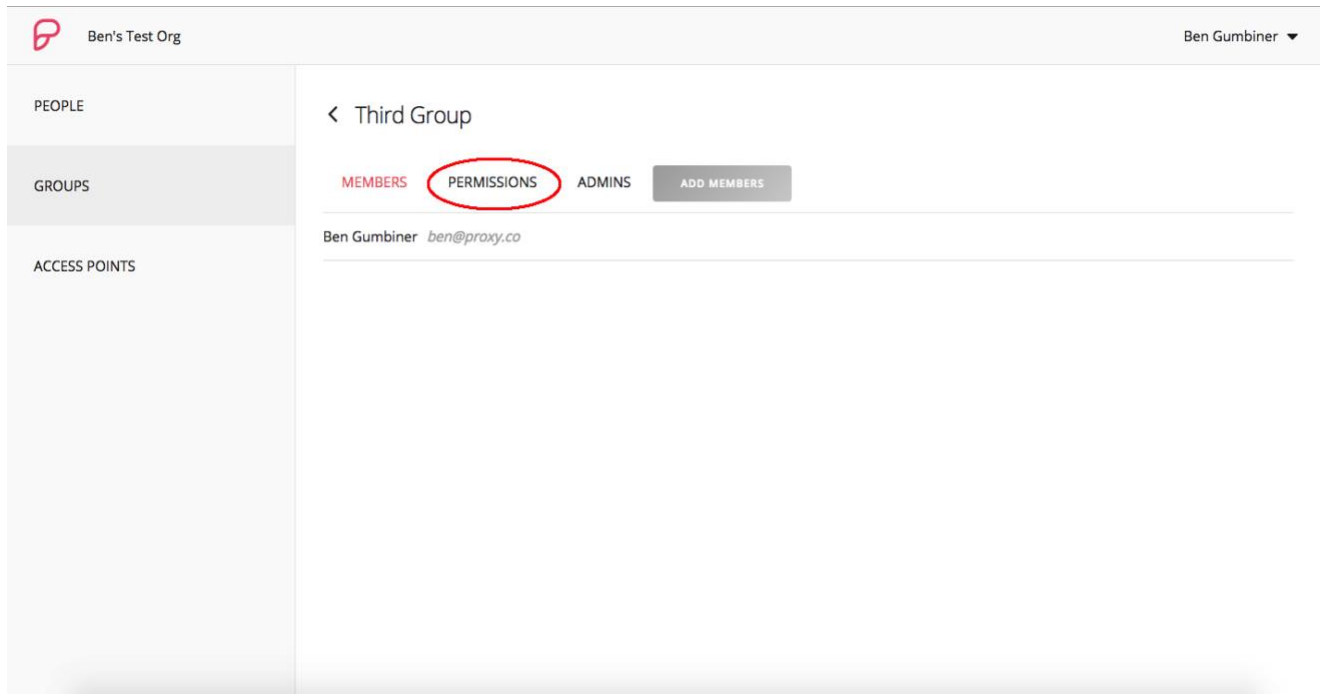
2. Select the “Add Members” button.



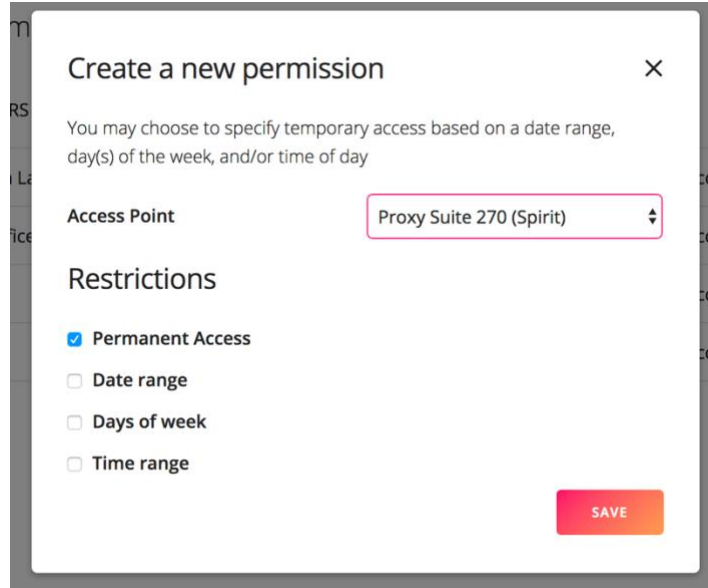
3. Add individual members or multiple people from the list of users you just created in the PEOPLE section.

Set Group Permissions

1. Select “GROUPS” from the left panel, and then select one of the previously created groups, or create a new one by clicking the “Create New Group” button.
2. Select “Permissions” from the middle tab.



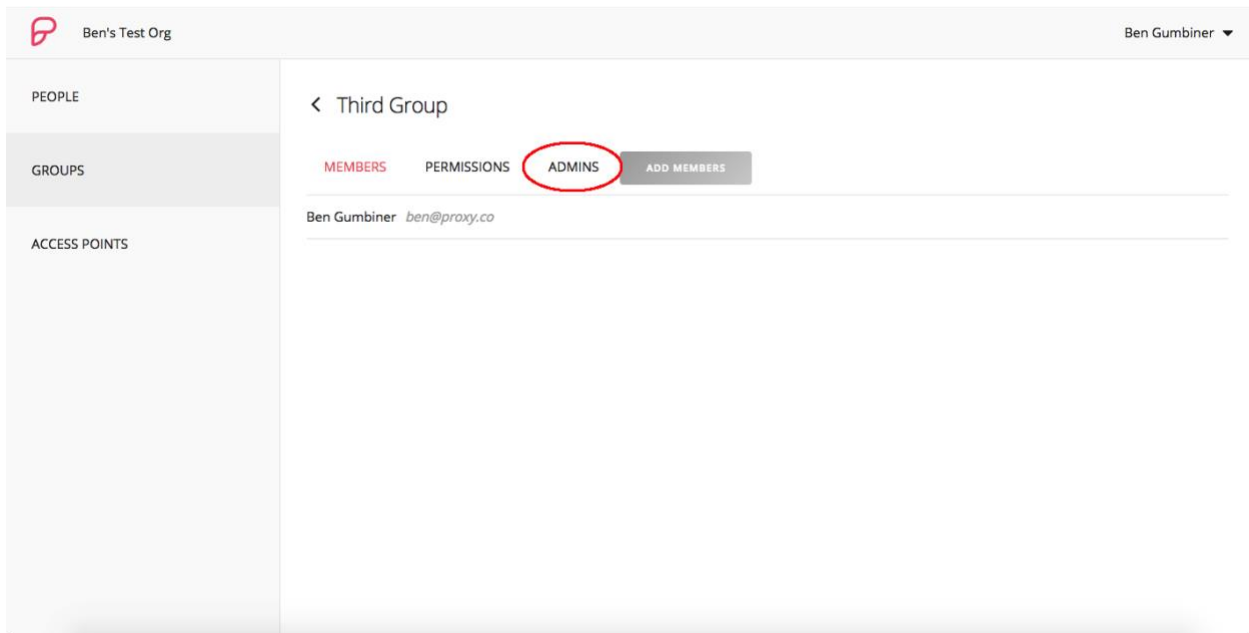
3. Select the “Create Permissions” button.
4. Select the appropriate access point and your desired permissions.



5. Select a specific date range or specific days of the week for repeat occurrences. You can also select a time range here.

Set Group Admins

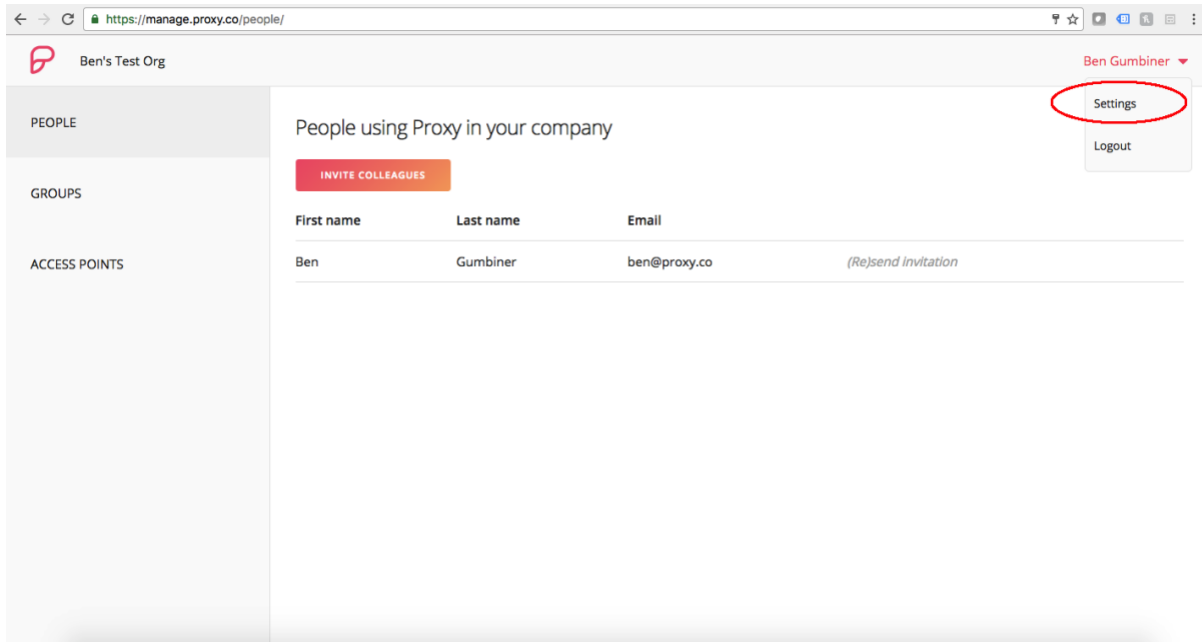
1. Select “GROUPS” from the left panel, and then select one of the previously created groups, or create a new one by clicking the “Create New Group” button.
2. Select “Admins” from the middle tab.



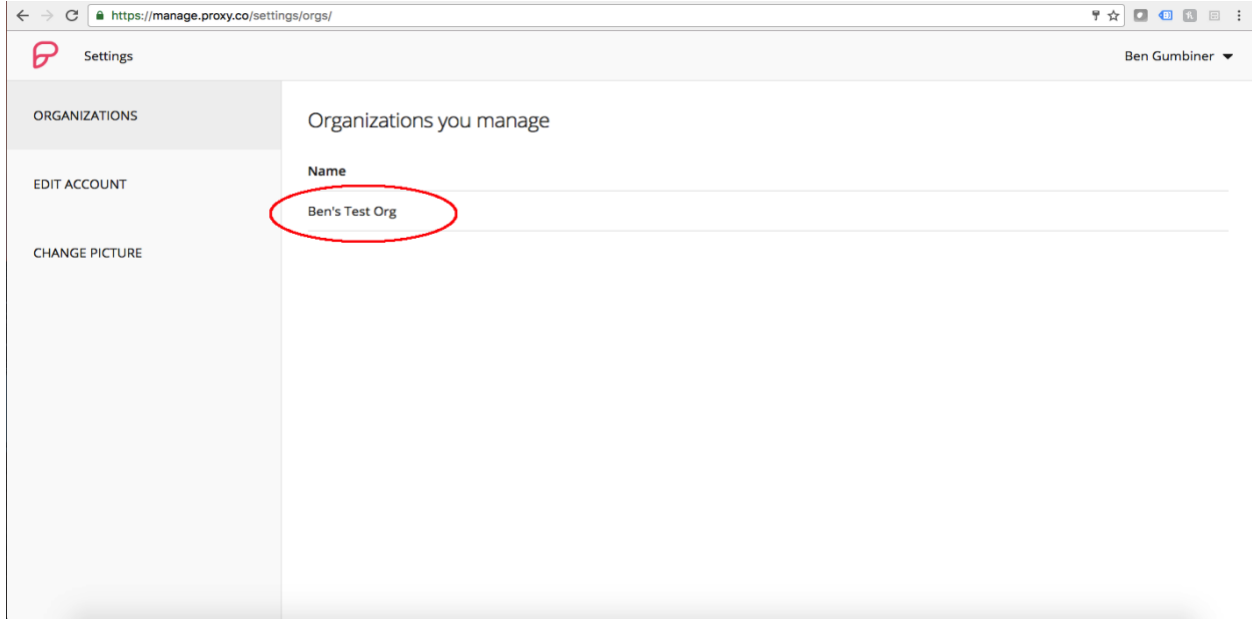
3. Select the “Add Admin” button
4. Select the appropriate person from the drop down list to add as an admin for the group (if you don’t see the person listed, navigate back to the PEOPLE tab and add them there)

Adding Admins to Your Org

1. Click on your name in the top right corner, and select “Settings”.



2. Click on the org that you want to add the new admin to.

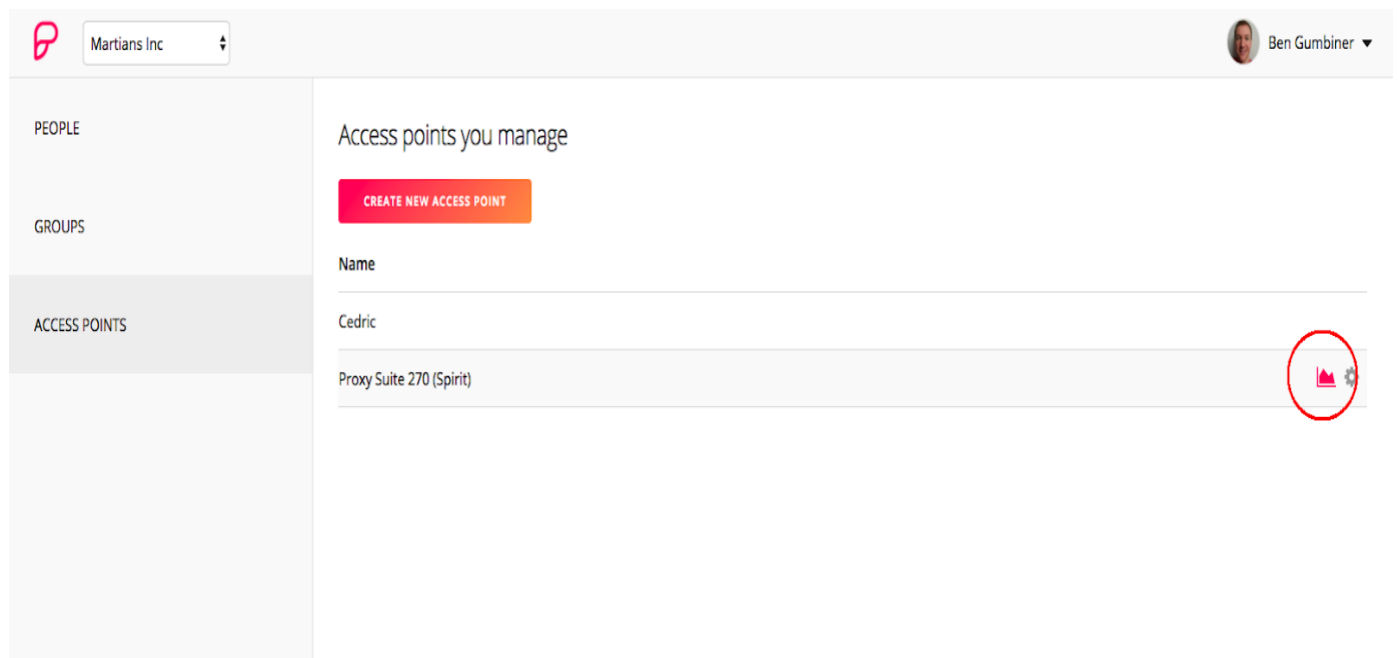


3. Click the "Add Admin" button and select the appropriate user who was previously added (if the user does not exist, go back to the PEOPLE tab and add the user).
4. Hover over your name in the top right corner and select "Mobile Access Manager" or click on the P in the top left corner to return to the Mobile Access Manager home screen.

View Tracking Information

Once you are up and running with Proxy, you can view logging information by Access Point.

1. Select “Access Points” from the left menu.
2. Hover over the access point and select the graph icon from the right side.




The screenshot shows the Proxy Mobile Access Manager interface. At the top, there is a header with the company logo, a dropdown menu set to 'Martians Inc', and a user profile for 'Ben Gumbiner'. The left sidebar contains navigation options: 'PEOPLE', 'GROUPS', and 'ACCESS POINTS', with 'ACCESS POINTS' currently selected. The main content area is titled 'Access points you manage' and features an orange 'CREATE NEW ACCESS POINT' button. Below this is a table with the following entries:

Name
Cedric
Proxy Suite 270 (Spirit)

A red circle highlights a small icon (a bar chart with a gear) on the right side of the 'Proxy Suite 270 (Spirit)' row, indicating where to click to view tracking information.

3. Select the type of event you would like to see from the Event Type at the top (“Door Unlocked” is the default).
4. Hover over the event to see the detailed date and time information.

 Martians Inc Ben Gumbiner

PEOPLE
 GROUPS
ACCESS POINTS

< Proxy Suite 270 (Spirit)


Last Updated: September 26th 2017, 12:27:41 pm
 Filter Event Type: Door Unlocked

Name	Event	Date
Ismael Henchi	Door Unlocked	an hour ago
Ben Gumbiner	Door Unlocked	2 hours ago <i>September 26th 2017, 10:06:36 am</i>
Simon Ratner	Door Unlocked	4 hours ago
Simon Ratner	Door Unlocked	4 hours ago

Edit Your Personal Account Settings

Name

1. Log in to the Mobile Access Manager
2. Click on your name in the top right corner and select “Settings”.


 Proxy Technologies, Inc. Ngoc Chan

PEOPLE
 GROUPS
 ACCESS POINTS

People using Proxy in your company

INVITE COLLEAGUES

First name	Last name	Email	Invitation
Arturo	Mancilla	art@proxy.co	(Re)send invitation

 Proxy Technologies, Inc. Ngoc Chan

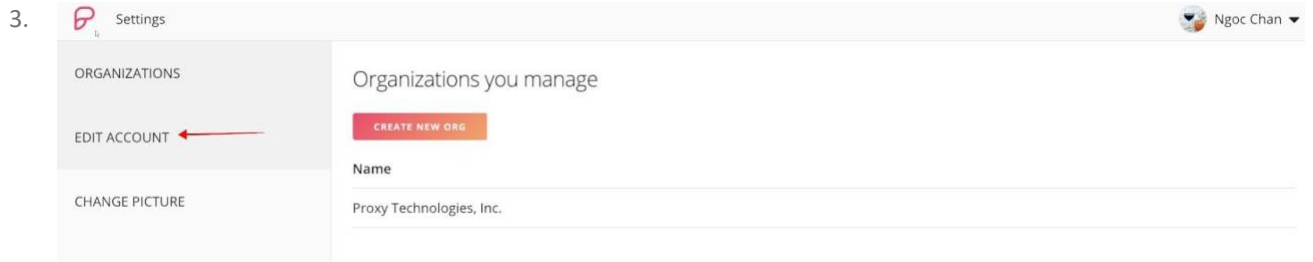
PEOPLE
 GROUPS
 ACCESS POINTS

People using Proxy in your company

INVITE COLLEAGUES

First name	Last name	Email	Invitation
Arturo	Mancilla	art@proxy.co	(Re)send invitation
		nwilliams@kpcb.com	(Re)send invitation

Settings
 Logout



4. Edit the name to your profile and click “save”.



Changing Your Account Photo

1. Log in to the Mobile Access Manager.
2. Click on your name in the top right corner and select “Settings”.
3. Select “Change Picture” on the left menu.
4. Select “Upload from your library”.
5. Navigate to your picture location and click “Open”.

Removing a User from the Org

1. Log in to the Mobile Access Manager.
2. Select “People” from the left menu.
3. Hover over the user and select the gear icon from the right side.
4. Select “Remove from Org” from the pop up.

Send an Invitation to a User

1. Log in to the Mobile Access Manager.
2. Select “People” from the left menu.
3. Click “Invite Colleagues”.
4. Add the user email on the pop up.
5. Select “Add”.

How to Resend an Invitation

1. Log in to the Mobile Access Manager
2. Select “People” from the left menu
3. Hover over the user name and select “Re(Send) Invitation” under the Invitation column.
4. When prompted with “Are you sure? This user will receive an email invitation,” select “Yes”.

How to Add an Access Point

1. Login in to the Mobile Access Manager.
2. Select the Org you want the new reader to be placed in.
3. Select “Access Points” from the left menu.
4. On the “Access points you manage” page, click “Create New Access Point”.
5. Enter the new access point information.
6. Click “Add”.
7. The new access point should appear on your Proxy ID app under the org you placed it in.

Edit an Access Point Settings

1. Log in to the Mobile Access Manager.
2. Select “Access Points” from the left menu.

3. Hover over the access point and select the gear icon from the right side.
4. From the “Edit Access Point” menu, click on the settings you want to edit.
 - a. Door Name
 - b. Time Zone
 - c. Auto-unlock
 - d. Auto-unlock range
 - e. Change Picture - This changes the Proxy Access Card image

Note: Do not edit the Device ID unless you need to

Creating a New Org

1. Log in to the Mobile Access Manager.
2. Click on your name in the top right corner and select “Settings”.
3. Select “Organizations” on the left menu.
4. Click “Create New Org”.
5. Enter the organization name and accept the Proxy Terms and Conditions.
6. Select “Save”.