

Proxy Dashboard

Admin Instruction Guide

Proxy Dashboard

The Proxy Dashboard is a browser-based application that enables administrators to:

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 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
- Ability to use default org credentials

Manage Groups

- Create new group(s)
- 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 & Permissions

- 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

Proxy Dashboard – Getting Started

Part 1: Site Set Up

1

Login to the dashboard.

If you are an admin for Proxy Dashboard with an existing organization, use the following steps to log in.

Visit:

<https://dashboard.proxy.com>.

Enter your registered email and click "Verify email".

You'll receive a verification code to your registered email. Enter the code and click "Next".

2

Creating Groups (Global).

On the landing page of the Dashboard, select "All People" from the left panel.

In the next window select the "Create global group" button. Name the new global group and add users.

3

Creating Groups (Site).

On the landing page of the Dashboard under Services, click "Proxy Access" in the top left corner to go to a Site View.

In the Site View of the Dashboard, select the site within which you want to create a new group of users.

Select "People" from the left panel.

Select the "Create group" button.

Give a name to the new site group and add users to it.

Part 2: User Management

1

Adding a User

Once logged in to the Dashboard, select "All People" from the left menu.

Click the red "Add People" button at the top right of the page.

Click "Invite People". You can also import via a CSV.

Add the user email on the pop up. You may enter multiple email addresses to invite more than one person.

Select the Global Group for this person on the pop up.

Click the red "Add x people globally" button.

2

Resending Invitations

Log in to the Proxy Dashboard

Select "All People" from the left menu.

Click the "Pending" tab.

In the "Status" column, hover over the "Pending" button and the envelope icon will turn red. Click the red envelope to resend the invite.

3

Suspend or Delete a User

Log in to the Proxy Dashboard.

Select "All People" from the left menu.

Hover over the user and click the "..." that appear at the right of the screen.

Select either "suspend user" or "delete forever".

Proxy Dashboard – Getting Started

Part 3: Readers

1

Create Reader Group

From the landing page, enter Proxy Access under Services.

In the top left corner, select the Proxy Site you want the new reader to be placed in.

Select the "Readers" menu on the left of the screen and the "Create group" button.

In the pop-up tab, enter the name of the group of readers into which you will add your new Proxy reader. For your convenience, you may also add a brief description of the group.

Confirm by clicking the "Add readers to group" button.

2

Add Readers to Group

Once a reader group has been created, you will be navigated to the list of readers belonging to your site. Select the reader(s) you wish to add.

Confirm your selection by clicking the red "Add ... to group" button at the bottom of the screen.

You will be navigated to a screen where you can either create a new permission type for the newly created reader group or add the group to an already existing permission.

Part 4: Permissions

1

Create Site Permissions

From the landing page, enter Proxy Access under Services.

In the top left corner, select the Proxy Site you want to add permissions to

Select the "Permissions" tab.

Click the "Create new permissions" button on the right.

Create a name for your new permission. You may also add a short description for your own convenience.

Confirm by clicking the "Create permission" button.

2

Assign Permissions

Tick the box next to the User Group you wish to assign the new permission to.

Select the "Next step: add readers" button at the bottom of the screen.

Tick the box next to the reader that your new permissions are to control.

Select the type of schedule you want to connect your new permission to. Choose between Restricted Access or Unrestricted Access.

Confirm with the red "Publish permission" button below.