



SmartLock® Surf

QUICK START GUIDE

August 2009



Cutting edge simplicity

Step 1. Software Installation

1. Insert the SmartLock Surf software CD into the server PC's CD drive.
2. Enter the software key that came with your CD when prompted.
3. Follow the instructions to complete the installation.

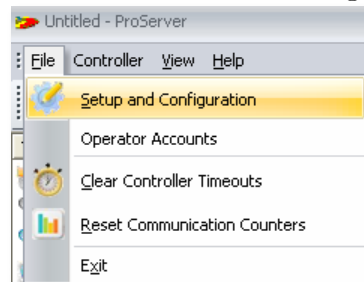
Step 2. CLAUSB Communications

Skip this section if you are using a Canlan communications device.

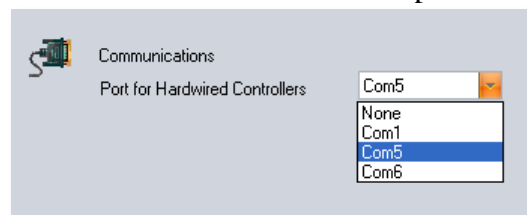
1. Go to **Start > All Programs > SmartLock Surf > Launch Pro Server**.



2. From the main menu, go to **File > Setup and Configuration**.



3. Choose a communications port from the drop-down menu.

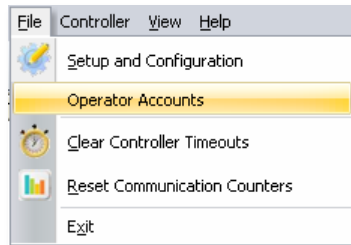


4. Click **OK**.

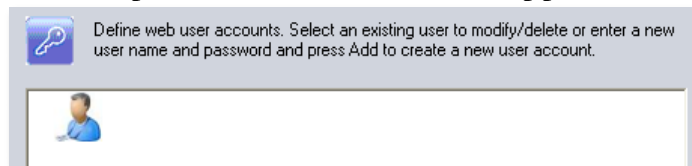
Step 3. Operator Accounts

Specify operator user names and passwords for people who will be managing the SmartLock Surf access control system. *There is no default account, so you must set up at least one operator account.*

1. In the Pro Server, go to **File > Operator Accounts**.



2. Click **New**.
3. A new operator account icon will appear in the *User Accounts* window.



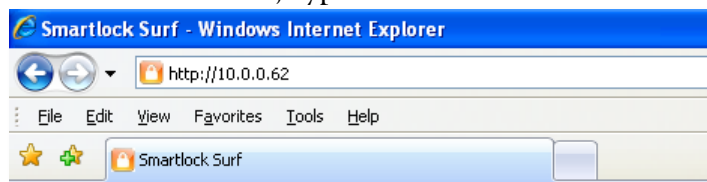
4. Enter a user name and password for the operator account.



5. Create additional operator accounts if necessary.
6. Click **OK**.

Step 4. Start the Browser

1. Start *Pro Server* and *Surf Server* if not already running.
2. Launch **Internet Explorer**.
3. In the address bar, type the IP address of the Server PC.



4. Enter the user name and password of your operator account.

A screenshot of a "Surf Login" form. The form has a black header with a key icon and the text "Surf Login". Below the header, there are two input fields: "User Name" with the text "Heather Scott" and "Password" with a masked password "••••••". A "Submit" button is located at the bottom right of the form.

Step 5. Readers

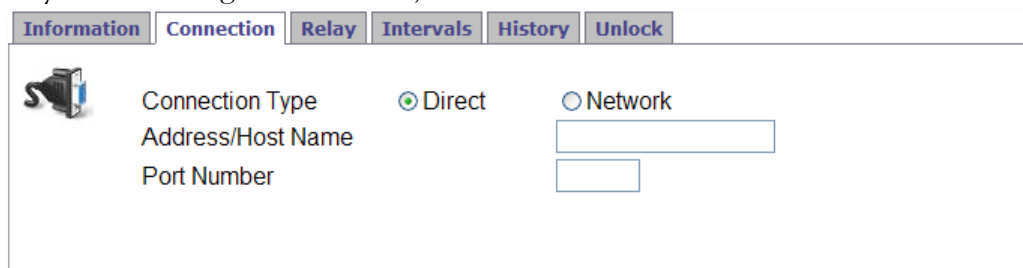
1. In the *Readers* section, click **Add New Reader**.
2. On the *Information* tab, enter the panel's unique address (1 to 30).

A screenshot of a web interface for adding a new reader. The interface has a tabbed menu at the top with "Information", "Connection", "Relay", "Intervals", "History", and "Unlock". The "Information" tab is selected. Below the tabs, there is a form with three input fields: "Address" with the value "1", "Reader Name" with the value "Front Door", and "Exit Reader Name" which is empty. There is a small icon of a reader panel to the left of the input fields.

NOTE: the address of the panel is set using DIP switches 1 thru 6. Refer to the *SmartLock Installation Manual* for more details.

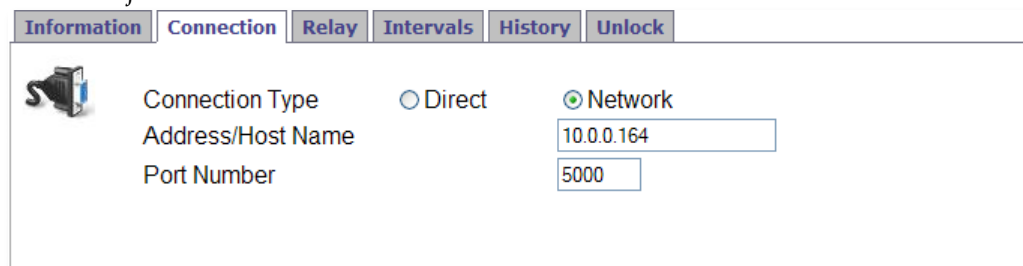
3. Enter a descriptive name for the reader and exit reader (if applicable).
4. Click on the *Connection* tab.

5. If you are using a CLAUSB, select **Direct**.



The screenshot shows the 'Connection' tab of the SmartLock Surf interface. The 'Connection Type' is set to 'Direct' (selected with a radio button). The 'Address/Host Name' and 'Port Number' fields are empty. The 'Information' tab is also visible on the left.

6. If you are using a Canlan, select **Network** and enter the IP address (or host name) and port number of the Canlan. See the *Canlan Installation Manual* for more details.



The screenshot shows the 'Connection' tab of the SmartLock Surf interface. The 'Connection Type' is set to 'Network' (selected with a radio button). The 'Address/Host Name' field contains the IP address '10.0.0.164' and the 'Port Number' field contains '5000'. The 'Information' tab is also visible on the left.

7. Click **Save** to save the reader settings.
8. Repeat for all readers.

Step 6. Access Schedules

Access schedules specify when cardholders can use their credentials to access a door. To create a new access schedule:

1. Click the **Access** tab from the SmartLock Surf browser interface.
2. Click one of the six available access schedules.



3. Enter a name for the access schedule.
4. Select the days and times when cardholders can use their credentials to unlock a door.
5. Click **Save**.

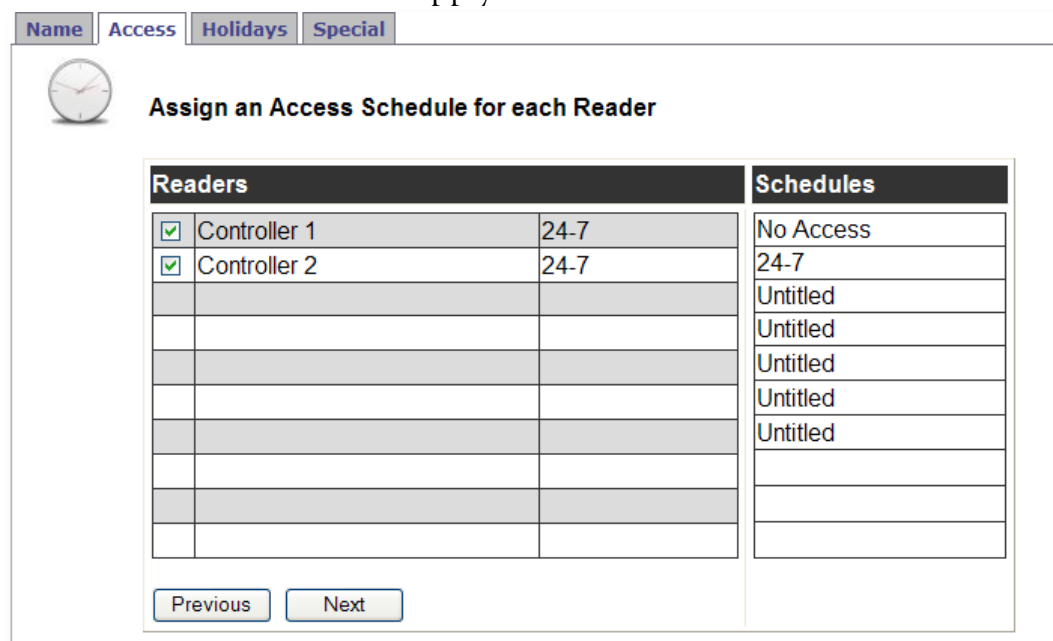
Step 7. User Profiles

User profiles specify which doors a group of cardholders can access, and link those doors with access schedule that define when those cardholders can access them. To create a new user profile:

1. Click the **Profiles** tab.
2. Click **Add New Profile**.



3. On the *Name* tab, enter a name for the user profile.
4. On the *Access* tab, select a reader (or readers).
5. Click an access schedule to apply it to the reader.

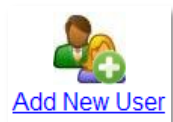
The interface shows the "Access" tab selected. It features a clock icon and the title "Assign an Access Schedule for each Reader". Below this is a table with two columns: "Readers" and "Schedules". The "Readers" column has two rows with checkboxes and labels "Controller 1" and "Controller 2", both with "24-7" in the adjacent column. The "Schedules" column lists "No Access", "24-7", and several "Untitled" entries. At the bottom are "Previous" and "Next" buttons.

Readers		Schedules	
<input checked="" type="checkbox"/>	Controller 1	24-7	No Access
<input checked="" type="checkbox"/>	Controller 2	24-7	24-7
			Untitled
			Untitled
			Untitled
			Untitled
			Untitled

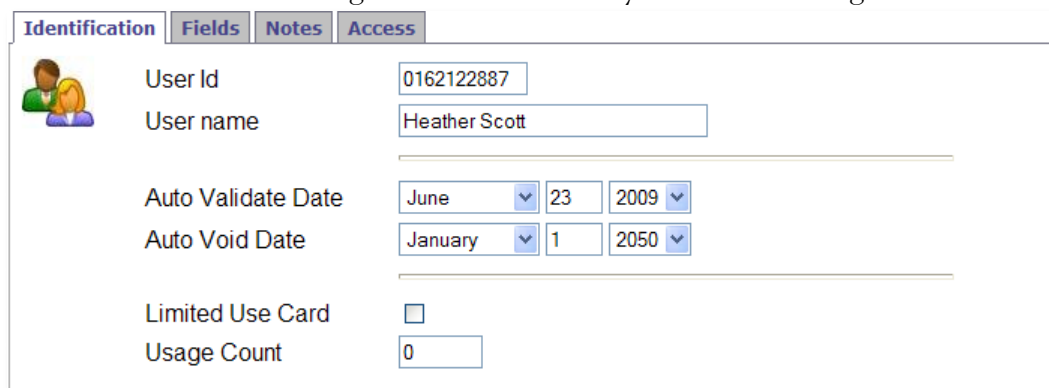
6. Cardholders who belong to this profile will only be able to access the reader during the times specified in the access profile.
7. Repeat for all readers and click **Save**.


Step 8. Cardholders

1. Click the **Users** tab.
2. Click **Add New User**.

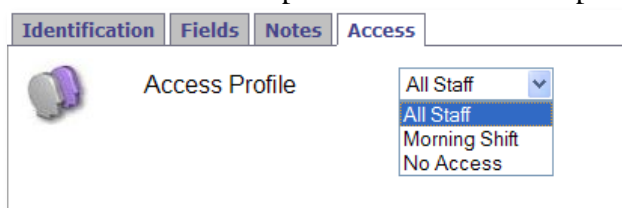



3. On the *Identification* tab, enter the 10-digit User ID number of the cardholder. Add leading zeroes if necessary to make 10 digits.

A screenshot of the "Identification" tab in a software interface. It contains fields for "User Id" (0162122887), "User name" (Heather Scott), "Auto Validate Date" (June 23, 2009), "Auto Void Date" (January 1, 2050), "Limited Use Card" (checkbox), and "Usage Count" (0).

	Identification	Fields	Notes	Access
	User Id	<input type="text" value="0162122887"/>		
	User name	<input type="text" value="Heather Scott"/>		
	Auto Validate Date	<input type="text" value="June"/> <input type="text" value="23"/> <input type="text" value="2009"/>		
	Auto Void Date	<input type="text" value="January"/> <input type="text" value="1"/> <input type="text" value="2050"/>		
	Limited Use Card	<input type="checkbox"/>		
	Usage Count	<input type="text" value="0"/>		

4. Enter the name of the cardholder.
5. Click the **Access** tab.
6. Choose an access profile from the drop-down menu.

A screenshot of the "Access" tab in a software interface. It shows an "Access Profile" dropdown menu with options: "All Staff", "All Staff", "Morning Shift", and "No Access".

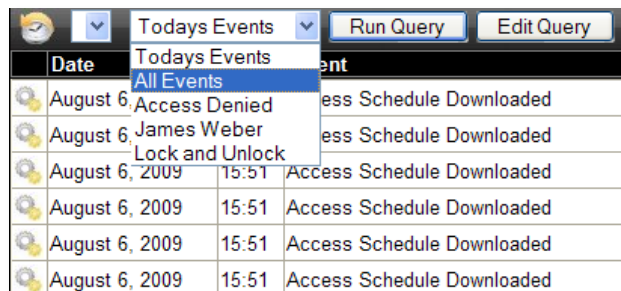
	Identification	Fields	Notes	Access
	Access Profile	<div><div>All Staff</div><div>All Staff</div><div>Morning Shift</div><div>No Access</div></div>		

7. Click **Save**.

Step 9. History

To view history events stored in the *Current History File*:

1. Click the **History** tab from the SmartLock Surf browser interface.
2. The current history events for the current day will be displayed.
3. To view past history events, select **All Events** from the drop-down menu.



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