

Getting started - Creating a profile and Setting up a system

Overview

Solo is phone-based access control. Use your phone to create and manage the system, then use it to open the door.

With the simplicity of a standalone system, Solo provides the power of a networked access control solution, including features such as gaining access, permissions-based access controls, access point management, plus event reporting and activity logs.

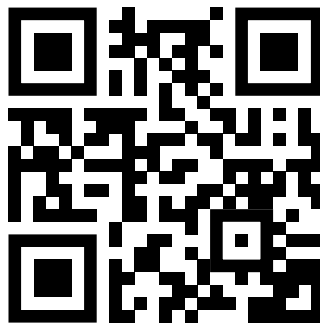
To get started you will need to install the app and create a profile. Then you can create a system, add your first access point, and add your first users.

Installing the app

The Solo app is available on both the App Store and Google Play. You can simply search for the app in the relevant store for your device.

You can also download the app using the following channels:

- Scan the QR code included on Solo hardware and marketing materials
- Click the link in your email invitation, if you have been added to an existing system
- Or scan the following QR code:



Creating a system

1. Open the Solo app and login
 - a. Solo is a passwordless app, to login for the first time simply enter your email address and you will receive a secure sign in link via email.
2. Tap on the green '+' icon in the top righthand corner
3. Tap on '**New System**'
4. Give the system a name and an image (optional) then tap '**Next**'
5. Select what type of site it is and tap '**Save**' or tap '**Skip**'

At this point you can either tap '**Done**' to go back to the home screen or tap '**Add access point**' to add your first access point.

Next Steps

To begin creating access points, please see the application note: APN-1215 - How to add an access point

To begin creating users, please see the application note: APN-1217 - How to manage users

To set up permissions, please see the following two application notes:

- APN-1218 - How to create and use Time Profiles
- APN-1220 - How to manage Access Levels

For more information on managing your payments, please see the following application note:

- APN-1231 - Managing credits in Solo

How to add an access point

Overview

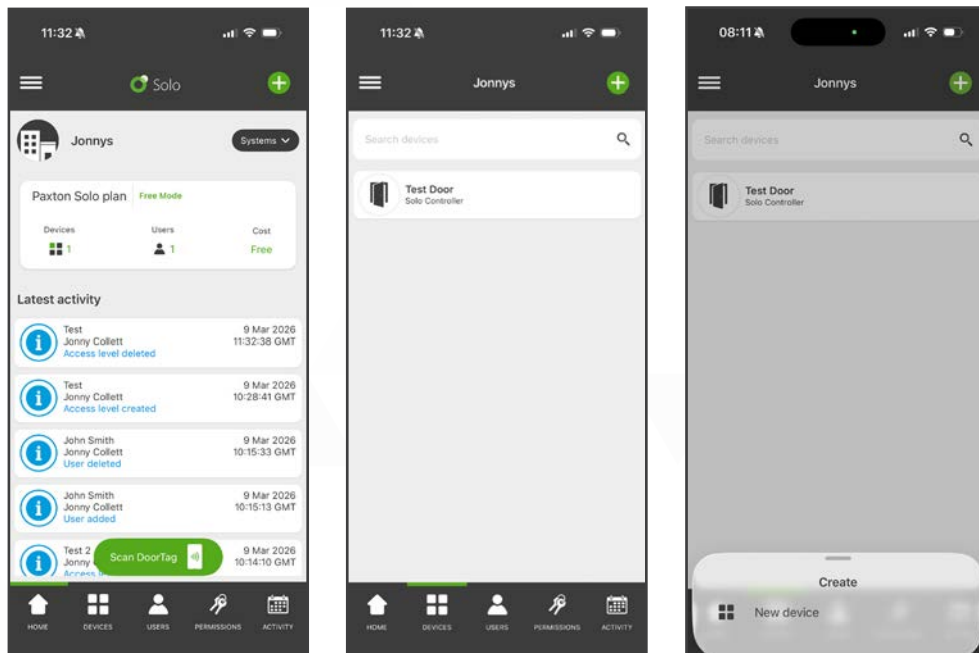
Solo's freemium model allows you to manage a single access point and a single user at no cost. This application note will guide you through the process of adding an access point to your Solo system.

To add more than one access point to your Solo system, you will need to add credits to your system.

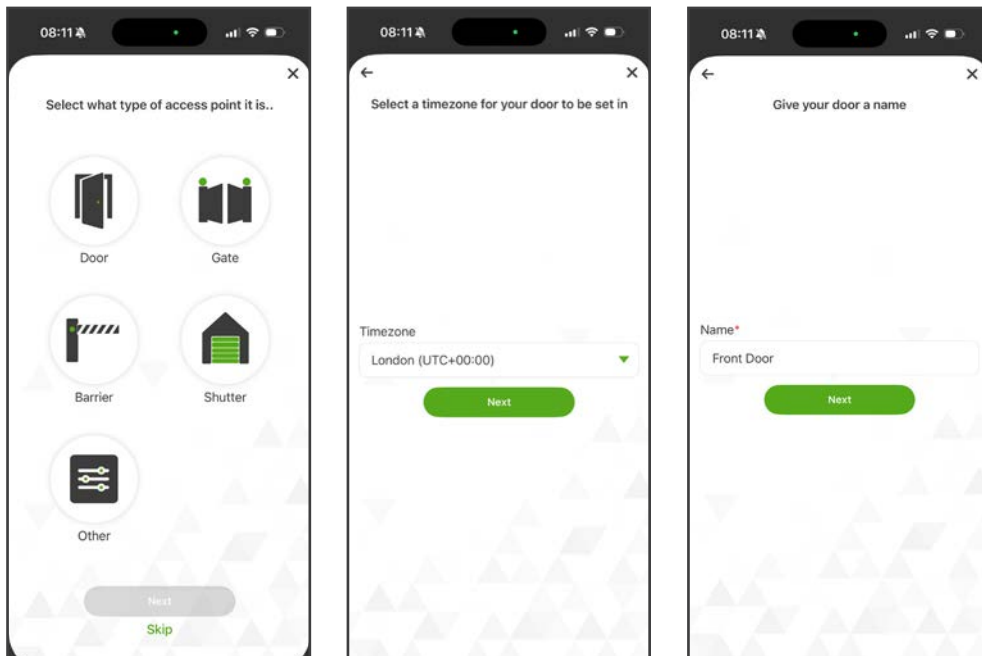
For more information on adding credits to your system, please refer to application note: APN-1231 - Managing credits in Solo.

How to add an access point

1. Login to the Solo app.
2. From the home screen, navigate to 'Devices'.
3. Tap the green '+' icon in the top righthand corner.
4. Tap 'New device'.



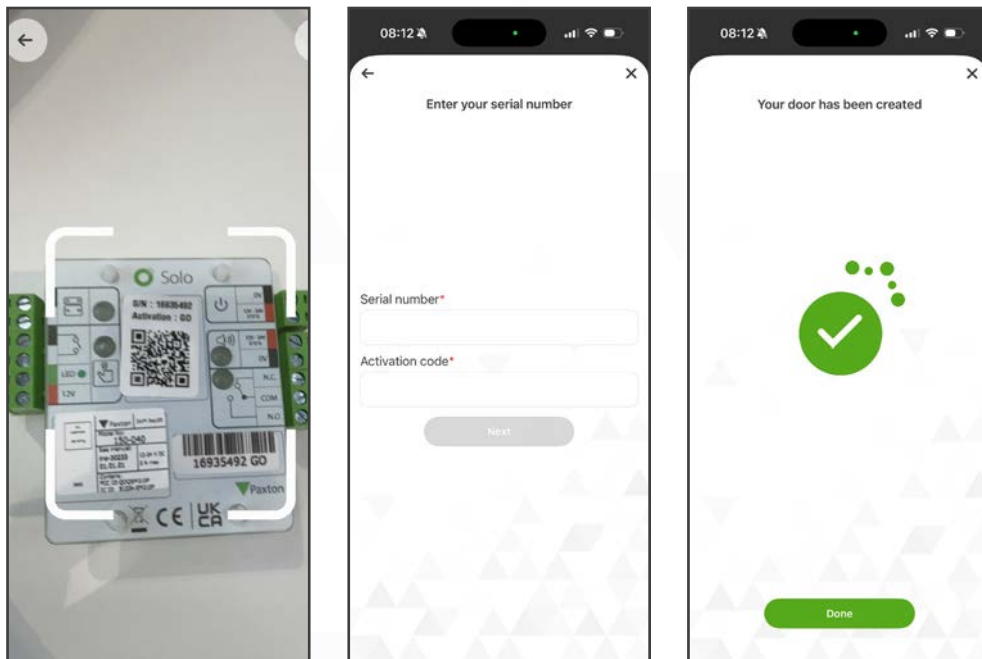
5. Select the type of access point and tap 'Next'.
6. Using the dropdown menu, select the timezone the device is in and tap 'Next'. Give your access point a name and tap 'Next'.



Tip: For simplicity, consider naming your access points based on where they are installed, for example Front Door or Back Gate. This will ensure your system remains clear and recognisable to newly enrolled users.

7. Scan the QR code or enter the serial number on the Solo - Controller to add the controller to your system and tap 'Next'.
8. Tap 'Done' to complete the process.

Or, you can move on to add your Solo - DoorTags. For more information on how to add DoorTags, please see application note: APN-1216 - Adding a Solo DoorTag.



Adding a Solo DoorTag

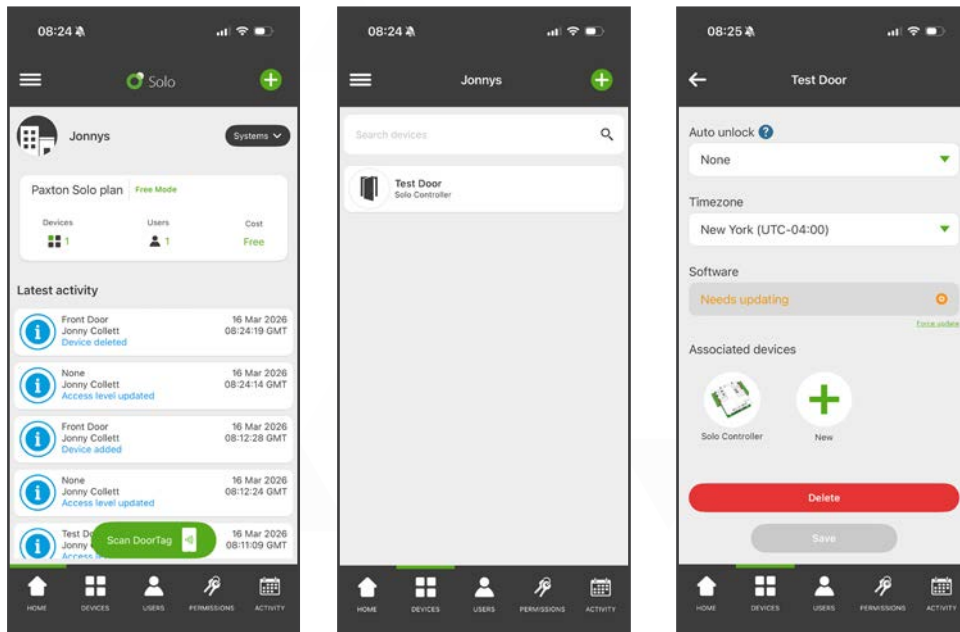
Overview

The Solo – DoorTag replaces the reader in a traditional access control system. Simply present the DoorTag with a phone to gain access. Designed for maximum flexibility, the DoorTags are quick to install, require no power or wiring, and pair easily with your Solo system.

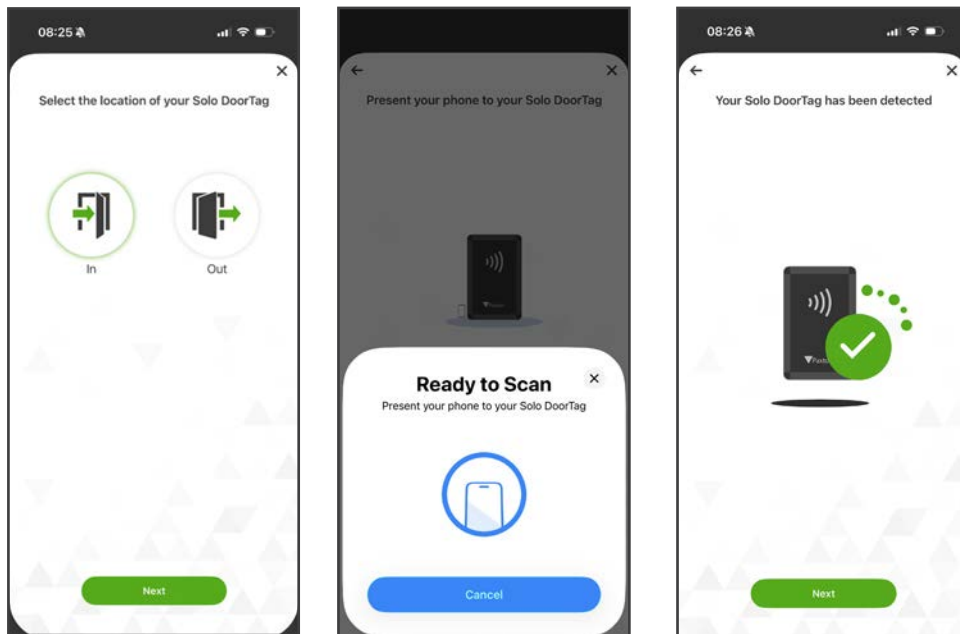
Each Solo - Controller supports up to four DoorTags, which must be mounted near the controller for optimal performance.

How to add a DoorTag

1. From the home screen, navigate to 'Devices'
2. Select the device you want to add your DoorTag to.
3. Tap the green '+' icon in the top righthand corner



4. Then, tap 'New DoorTag'.
5. Select whether your DoorTag will be on the inside or outside of a door and tap 'Next'.
6. Present your phone to the DoorTag.



Note: iPhones usually have the NFC reader located at the top of the device. Android phones typically have the NFC reader near the centre.

7. Once your DoorTag has been detected, tap **'Save'**.

You have now successfully added your DoorTag.

8. Tap done if you are finished or tap **'Add another DoorTag'** to add up to an additional 3 Solo DoorTags to this controller.

You will be taken back into the device overview, your DoorTags will be available to view at the bottom of the screen. To save your changes, you must tap the **'Save'** button.

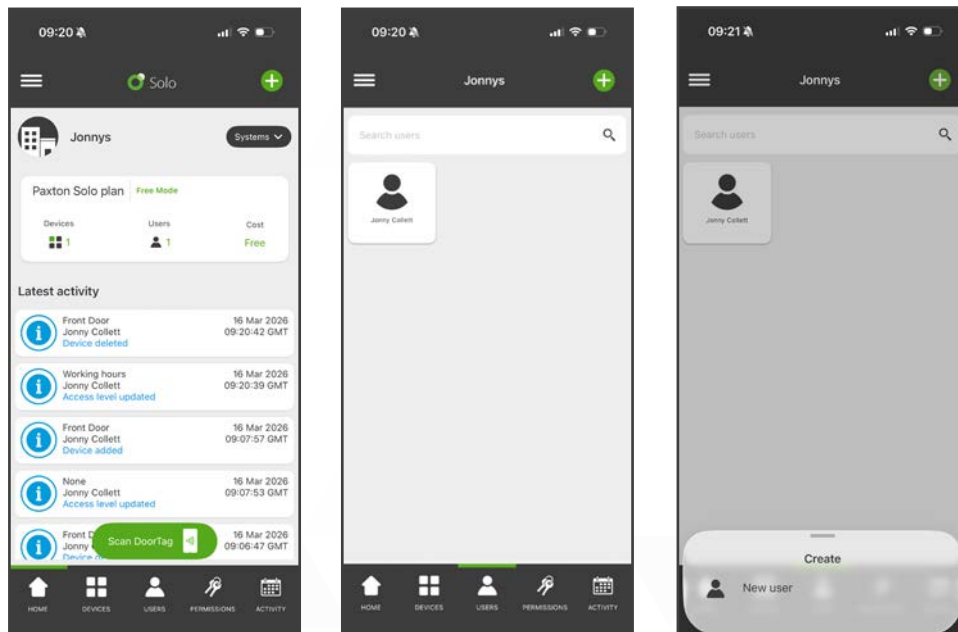
How to manage users

Overview

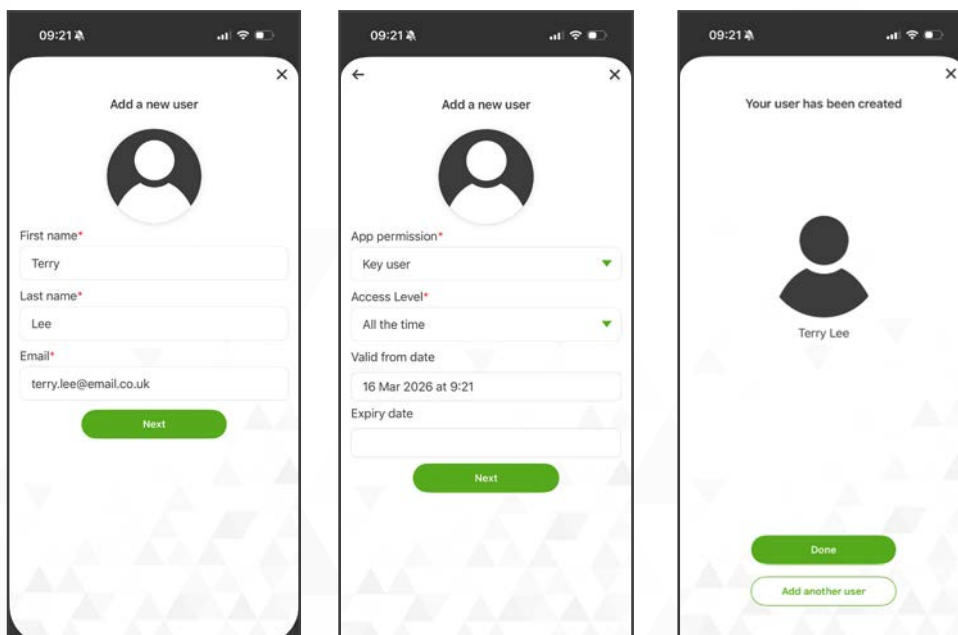
Solo users are added to the system using just their email address, first name, and last name. You can manage users' access levels, app permissions, and other relevant information from the Solo app.

How to add a new user

1. From the home screen, navigate to 'Users'
2. Tap the green '+' icon in the top righthand corner
3. Tap 'New user'

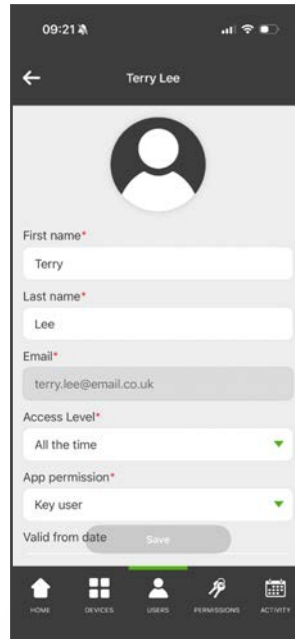


4. Enter the user's first name, last name and email address and tap 'Next'
5. Select the appropriate access level and app permission, then set a valid from and valid until date, and tap 'Save'
6. You can now tap 'Done' or tap 'Add another user'



Editing a user

To make changes to existing users, tap 'Users' and then tap on the relevant user record to open and edit it.



Editable data fields for a user:

First name: The first name of the user

Last name: The last name of the user

Access level: The access level selected for the user defines their permissions to go through doors. For more information on Access levels see APN-1220 'How to manage Access Levels'.

App permissions: The app permission selected for the user defines their level of administration access to your Solo system. There are three options:

- Key User – These users have no access to administer your Solo system. They can only access doors defined by their access level
- Token Administrator – These users can create other users and assign them access levels. They also have read only access to the other areas of the system. As with Key Users, they can only access doors defined by their access level.
- System Engineer – These users have access to everything in the app. Their door access is still defined by their access level.

Valid from: This is the date/time that users can start using the Solo app for administration or door access on this system.

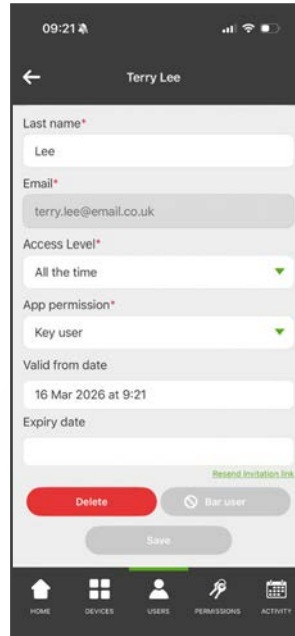
Keyholder: Users with keyholder access can open all doors at any time. Their access will still work for seven days if their phone is offline or the cloud is down. Only give this to trusted users.

Deleting users

On a user record, tap '**Delete**' to remove the user from your system. Once deleted they will no longer be able to access the system via the app or access doors.

Please note: This will only remove them from the system you have deleted them from. They will remain on any other systems they have access to.

If you need to remove administration access to the app but still want the user to have physical access through Solo controlled doors, please update their App permissions to '**Key User**'.



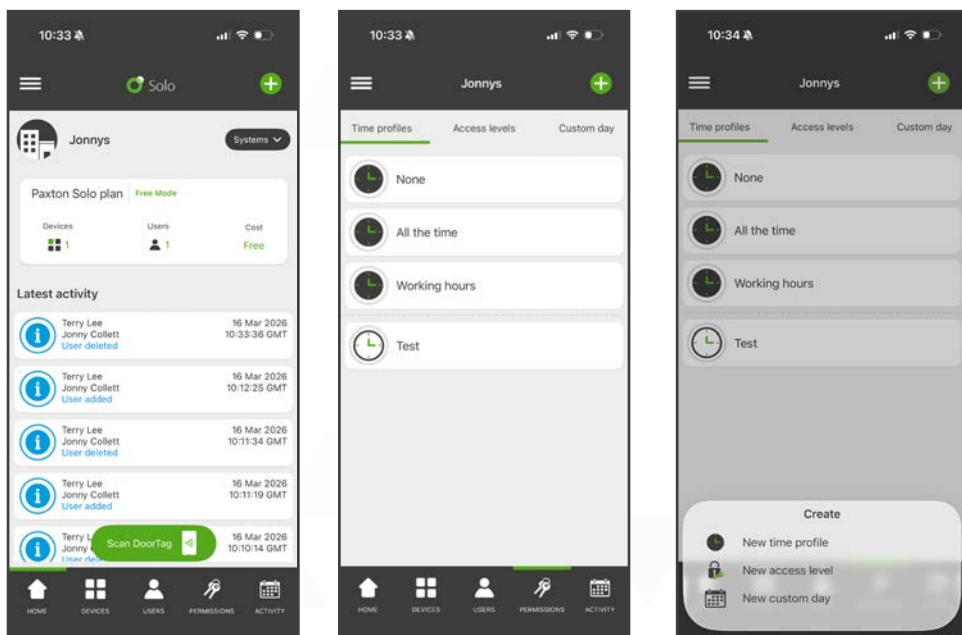
How to create and use time profiles

Overview

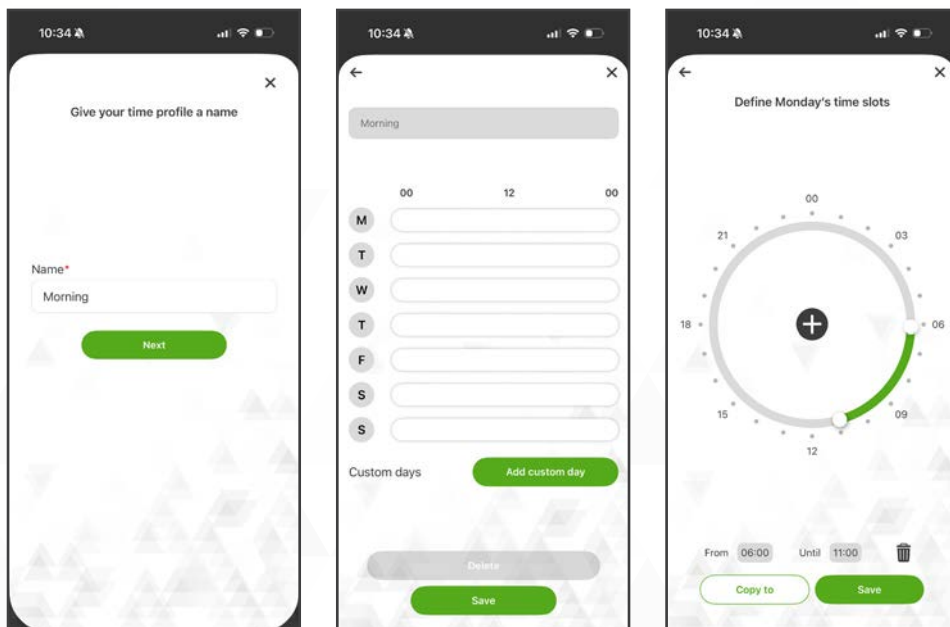
The Solo system offers robust and flexible time profile configurations, enabling users to automate access control based on specific time schedules. Time profiles are also used to define when doors should allow free access, ensuring both security and convenience requirements are met.

How to create a new time profile

1. From the home screen, navigate to 'Permissions'
2. Tap the green '+' icon in the top righthand corner
3. Tap 'New time profile'

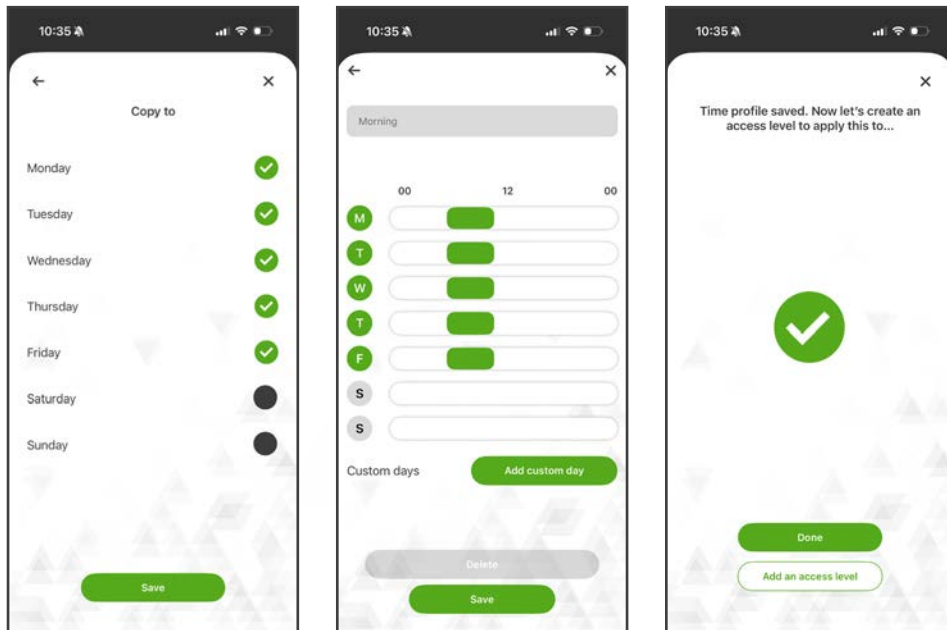


4. Give your time profile a name and tap 'Next'
5. Tap on the day(s) you wish to apply times to
6. Set the times you want to allow access. You can do this by tapping and dragging the handle or using the time field

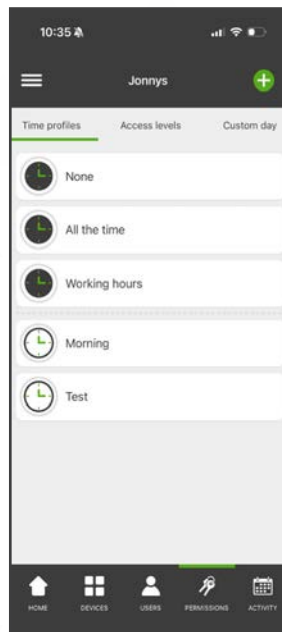


Tip: You can add multiple entries for the same day. Tap the '+' icon in the centre of the screen and add another 'From' and 'Until' time. You can add up to 3 time entries per day. This is particularly useful for allowing access only at specific times during the day i.e. opening the main doors at school drop off and pick up times.

7. You can duplicate time entries across multiple days using the 'Copy to' button. Remember to tap 'Save' to save the duplicated daily entries
8. Tap 'Save' to save your time profile
9. Tap 'Done' to complete the process, or you have the option to create an Access level to apply your time profile to.



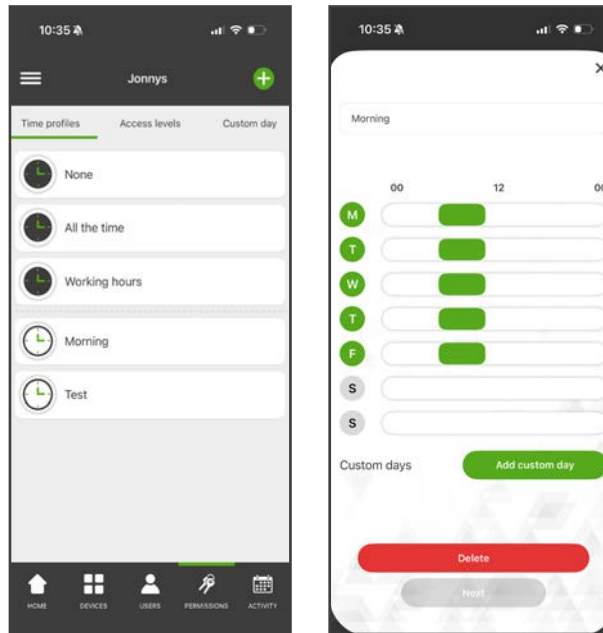
Your newly added time profile will be visible in 'Permissions > Time profiles'.



How to edit or delete time profiles

Time profiles can be easily amended at any time by a system engineer.

1. Tap the time profile you wish to edit or delete
2. Tap on the day you wish to edit. Remember to tap 'Save' when you're finished making changes.
3. Alternatively tap 'Delete' to delete the time profile.



How to set up custom days

Overview

The custom days feature allows users to set specific dates where access control rules change from the usual schedule. This is useful for holidays, special events or one-off closures.

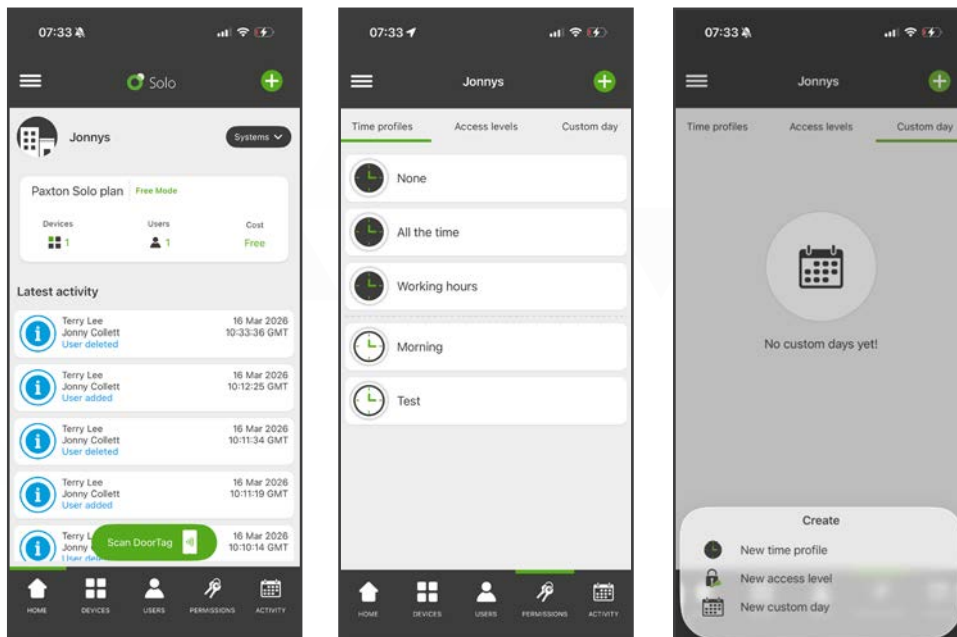
First, you will need to create a custom day such as 'Bank Holiday'. Next, you will select the dates of the year that this custom day should be applied. Once your custom day is created you can add it to a time profile where you can set your custom day behaviour.

Once a custom day is applied to a time profile, any time the Solo system or app uses the time profile it will behave as per the custom day setting on the specified date, replacing the usual time profile for that day. This affects 'access levels' and the 'auto unlock' setting.

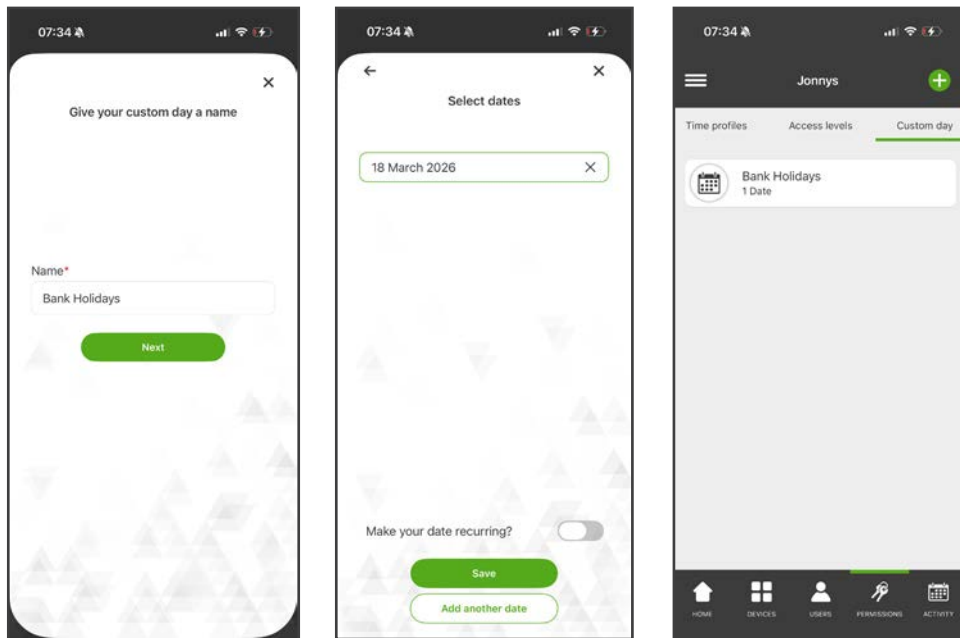
How to create a custom day

To create a new custom day:

1. From the home screen, navigate to 'Permissions'.
2. Tap the green '+' in the top righthand corner.
3. Tap 'New custom day'.



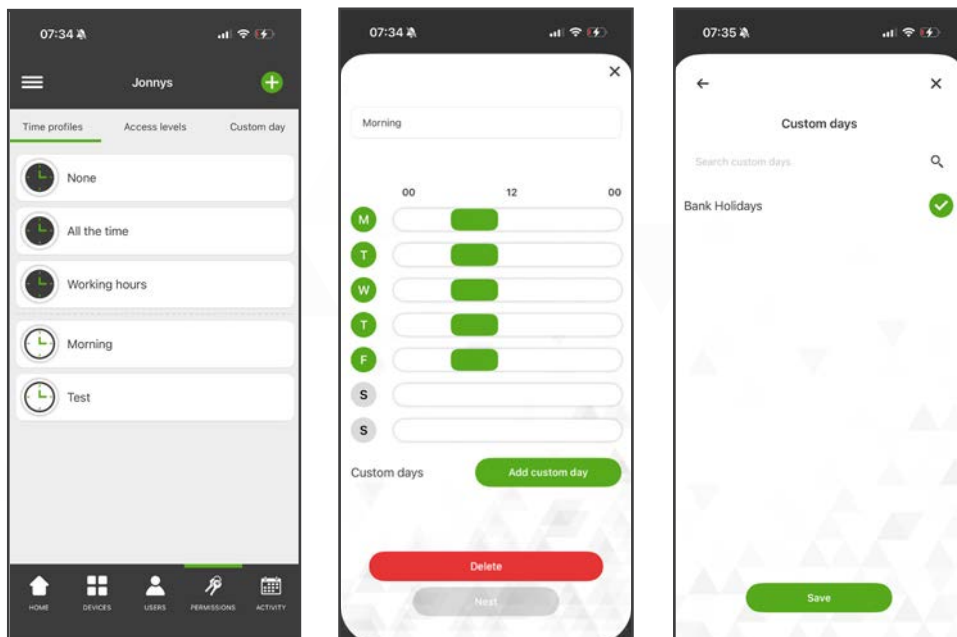
4. Give your custom day a name and tap 'Next'.
5. Select the dates of the year this custom day should apply to, and tap 'Save'.
 - a. If you want this custom day to apply to the same date each year, select 'Make your date recurring'.
6. Your custom day is now created.



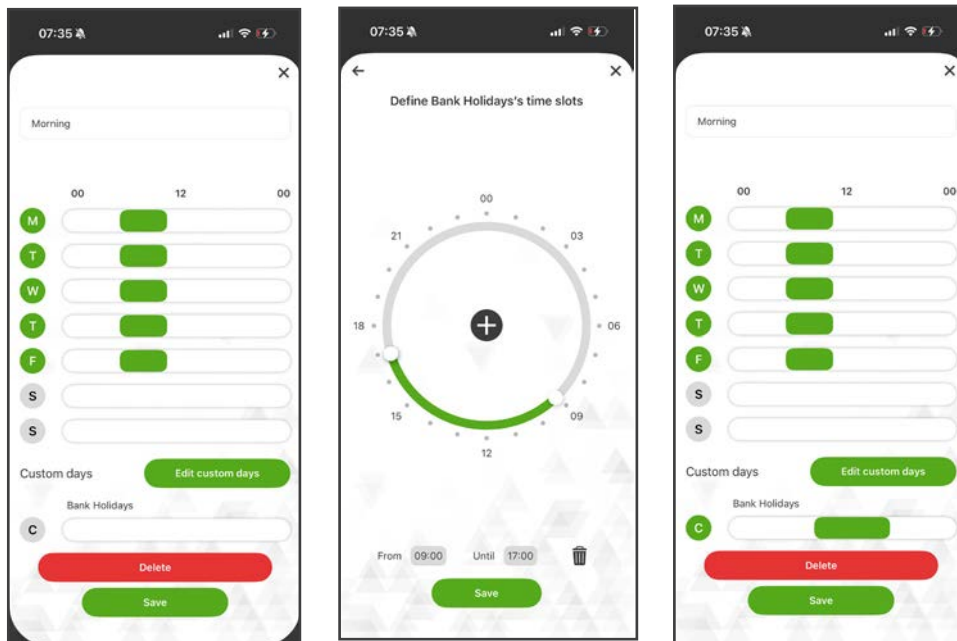
How to assign a custom day to a time profile

Once you have created a custom day, you will now need to assign it to a time profile and set the time slots desired for that day.

1. From the home screen, navigate to 'Permissions'.
2. Tap on the time profile that you want to assign your custom day.
3. Then tap on 'Add custom day'.



4. Select the custom day(s) you want to add to this time profile and tap 'Save'.
5. Tap on the custom day that now shows on the time profile.
6. Define the time slots for the custom day and click 'Save'.



Your custom day will now display the applied time slots.

Examples

Below are two examples of how a configured custom day would affect how Solo operates.

Access levels

A custom day has been created called '**Bank holiday**', there is one date added to this custom day, **26th May**.

The custom day '**Bank holiday**' has been added to the time profile called '**Cleaners shift**'.

The '**Cleaners shift**' time profile is Monday to Friday, 5pm until 9pm for each day. The '**Bank holiday**' custom day has no time slots added.

All cleaners have an access level that gives them access to all doors during the '**Cleaners shift**' time profile.

On **26th May** the cleaners will not be able to access the doors at all, as the custom day '**Bank holiday**' has no time slots added within the '**Cleaners shift**' time profile.

Auto unlock time

A custom day has been created called '**Open evening**'. There are two dates added to this custom day, **10th June** and **22nd October**.

The custom day '**Open evening**' has been added to the time profile called '**Open hours**'.

The '**Open hours**' time profile is Monday to Friday, 8am until 4pm, each day. The '**Open evening**' custom day has 8am until 4pm selected, as well as 5pm to 9pm.

The door 'Front door' has auto unlock set to '**Open hours**'. On a standard Monday to Friday day, the 'Front door' would be freely open from 8am until 4pm. On the **10th June** and the **22nd October**, the 'Front door' will be freely open from **8am until 4pm** and also **5pm to 9pm**.

How to manage access levels

Overview

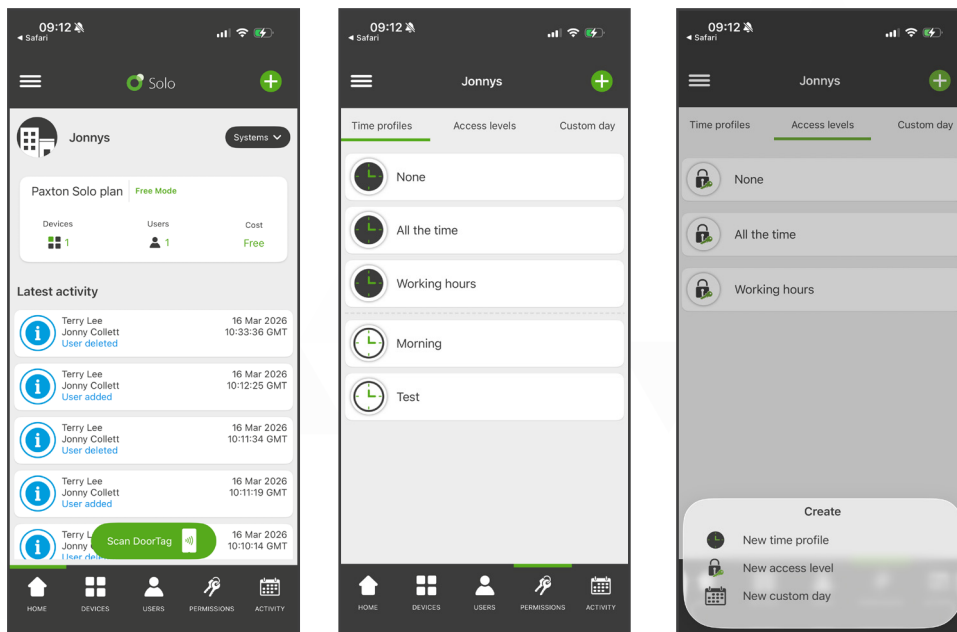
Using Solo's customisable access level system, easily define who can access specific areas and when, providing flexibility without compromising security.

Solo allows you to tailor permissions for each user, schedule access times and restrict entry to sensitive areas. With Solo's phone-based platform, managing access is simpler than ever.

How to create an access level

There are three default access levels. All hours, all doors (non-editable), Working hours (editable) and No access (non-editable). To add additional access levels, please follow the instructions below.

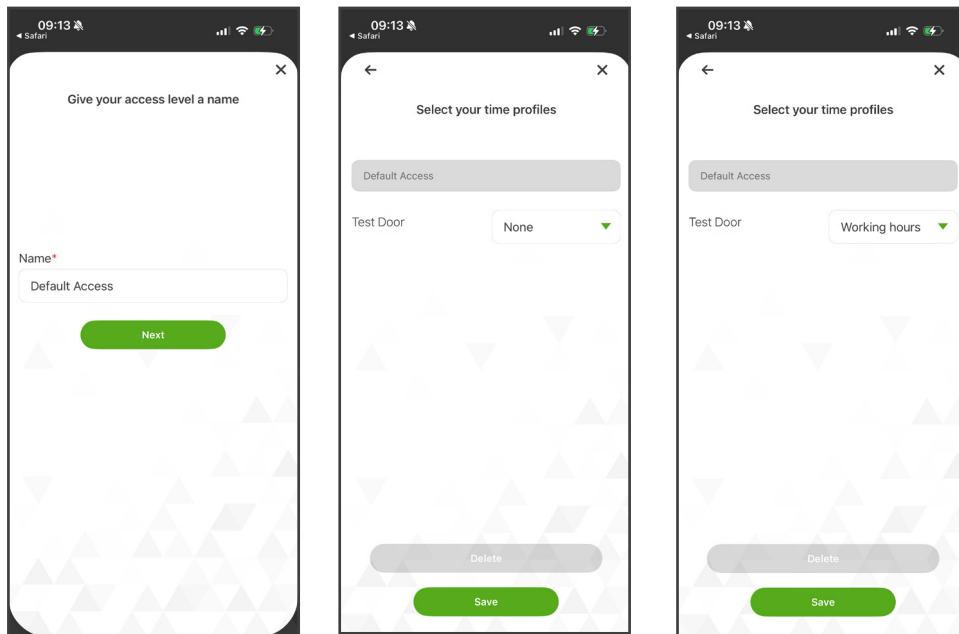
1. From the home screen, navigate to **'Permissions'**.
2. Tap the green **'+'** icon in the top righthand corner.
3. Tap **'New access level'**.



4. Give your access level a name and click **'Next'**.

You will now see a list of all access points on your system.

5. For each access point, click the dropdown menu and select a time profile. This will be the time that users with this access level can gain entry through the access point.
6. Once you have set the time profile for each access point, tap **'Save'**.



Applying an access level

To apply an access level to a user, navigate to the user's record and select the access level required. Please see application note APN-1217 - How to add and manage users, for more information.

Installation of DoorTag and Controller

Overview

This document provides practical guidance for the successful installation of Solo at customer sites.

It focuses on wireless technologies, including optimal device placement, maintaining signal integrity, and best practices to minimise interference. This is to simplify the installation experience and ensure the system functions reliably.

Solo - Controller

The Solo - Controller does not require any network infrastructure wiring, or wiring between the Solo - Controller and DoorTag. All communication occurs directly between the controller and the user's phone via Bluetooth.

As with all wireless installations, it's essential to plan carefully. Consider environmental factors such as wall materials, potential sources of interference, and distances between components to maximise performance and reliability.

Installation tips

- Avoid placing Solo - Controller near large metal objects or behind dense walls.
- Ensure a clear and reasonable range (ideally within 2–3 metres) between the user's phone and the Solo - Controller for a consistent Bluetooth connection.
- Test the Bluetooth signal strength on-site before finalising the placement.

Solo - DoorTag

The Solo - DoorTag communicates with a user's phone via NFC (Near Field Communication).

It does not directly communicate with the Solo - Controller. Instead, it serves as a trigger to initiate communication between the user's phone and the Solo - Controller. Proper placement of the DoorTag is crucial to ensure seamless system operation.

When a user presents their phone to the Solo DoorTag, it prompts the phone to initiate a Bluetooth connection with the Solo - Controller.

Installation tips

- Position the DoorTag close to the Solo - Controller to maintain signal integrity between the phone and Solo - Controller during access attempts.
- Mount the DoorTag at a convenient height and position for users to easily present their phones.
- The DoorTag is designed to be mounted on metal, however a large amount of metal between the Solo - Controller and DoorTag could impact the Bluetooth communication between the user's phone and Solo - Controller.
- When mounting the DoorTag using the included VHB strips, ensure the surface is smooth and has been cleaned prior to mounting.

Managing credits in Solo

Overview

This application note provides guidance on how credits are used within a Solo system. Credits are required when your installation expands beyond a single door or a single user.

You will learn how credits are applied, the process for adding them to a system, and the different ways they can be purchased either directly through the Solo app or via authorised distribution partners.

Free mode

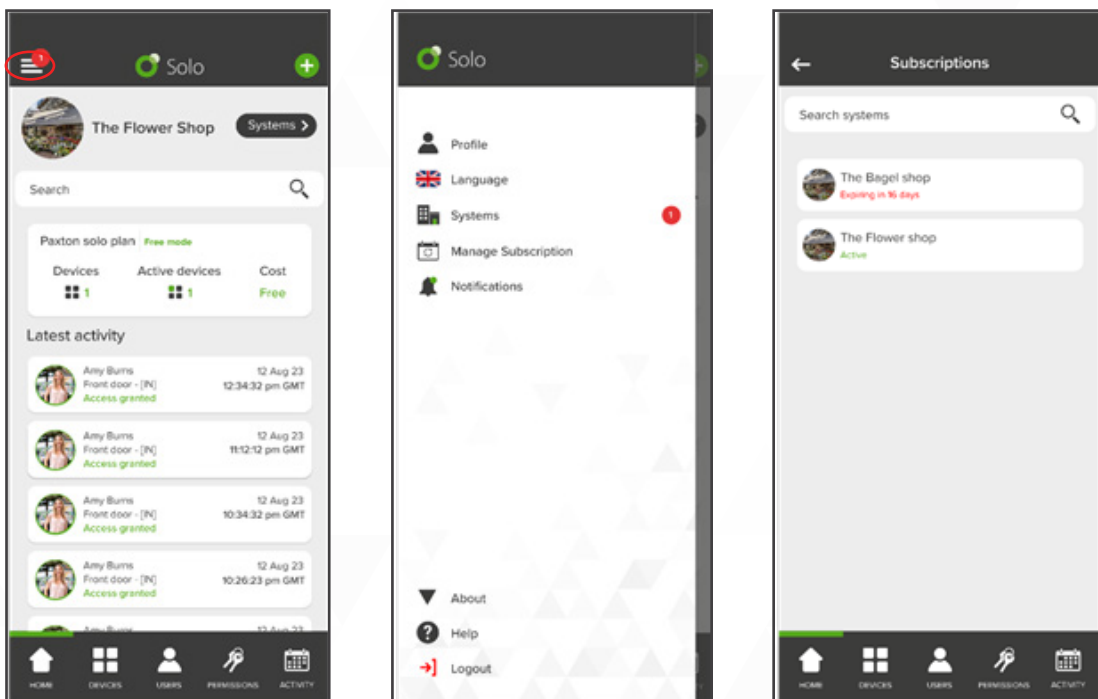
Solo offers a free mode, this allows a system to have one user and one device operating without any cost. If you add an additional door or an additional user, you will need to have credits on your system for the additional doors or users to work.

Purchasing and applying Credits

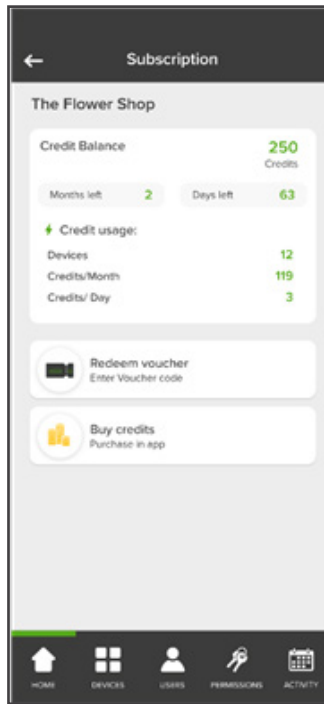
Credits can be purchased through our distribution partners, or using in app payments within the Solo app.

To view and manage your credit balance, go to the subscription area of the Solo app.

1. Tap on the burger menu in the top left corner
2. Select 'Manage Subscription'
3. Tap on the system you wish to manage



From here, you will be able to see information about your system's credit balance (explained later on) and the option to buy credits or redeem a voucher.

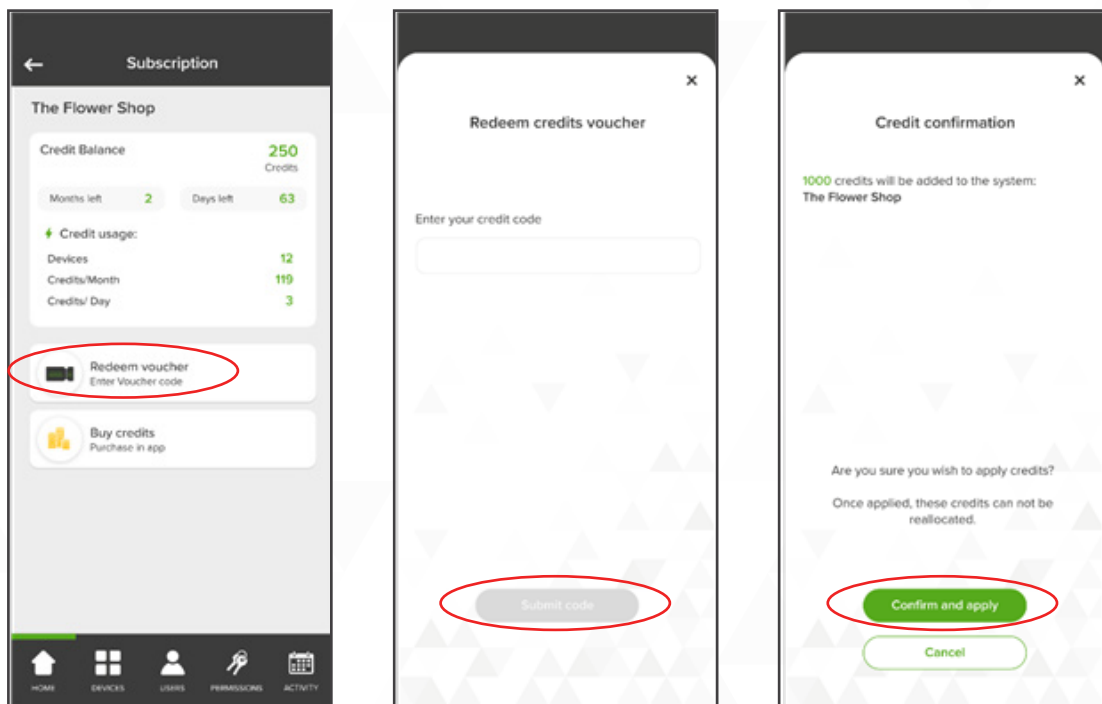


Redeeming a voucher

Once a voucher has been purchased, you will receive an email containing a code that can be entered into the Solo app.

To redeem the voucher:

1. Tap on 'Redeem voucher' within the subscriptions area
2. Enter your code and tap 'Submit code'
3. Check the number of credits and system you wish to add the credits to is correct and tap 'Confirm and apply'



The credits will now be applied to that system.

In-App Purchases

Credits can also be purchased within the Solo app using In-App purchases.

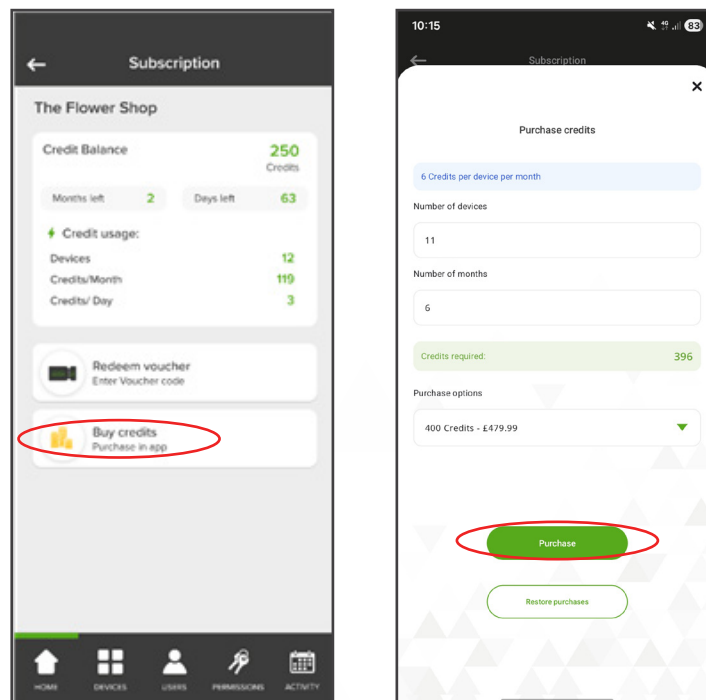
To purchase credits in the app:

1. Navigate to the subscription area and tap 'Buy credits'

You will now see some editable fields to help work out how many credits you need to purchase.

- Edit the fields to see how many credits you require
 - a. Number of devices will default to the number on your system
 - b. Number of months will default to six
- The drop-down will automatically select the closest number of credits needed to cover the figure produced from the above fields. You can also manually change the number in the drop-down menu if you know how many credits you will need.

2. Tap 'Purchase' and follow the In-app purchase instructions

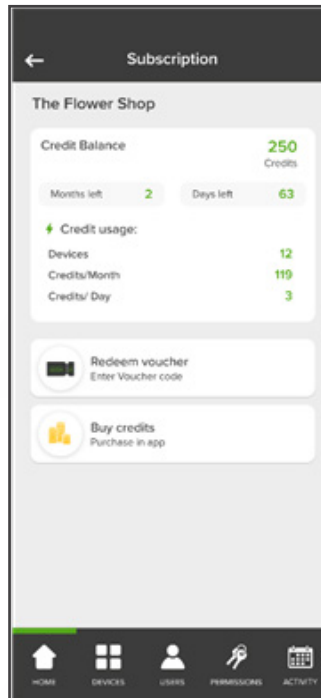


Subscription Information

The subscription screen will display all the information related to credits on your system.

It will display:

- Credit balance
- How many months are left of your credit balance
- How many days are left of your credit balance
- Number of devices on your system
- Number of credits used per month
- Number of credits used per day



Low Credits

Warning

If you are running low on credits and will soon not have enough to cover the cost of the devices on your system, you'll receive ample warning to give you time to act and add more credits.

If there are 30 days or less worth of credits remaining, system engineers and token administrators will receive a banner within the app to explain this. This banner will count down until there are no days left.

When there are 7 days left, key users will also receive this banner.

Insufficient credits

If a system does not have enough credits to meet the daily burn down requirement based on the number of devices on the system, users will be notified and required to take action.

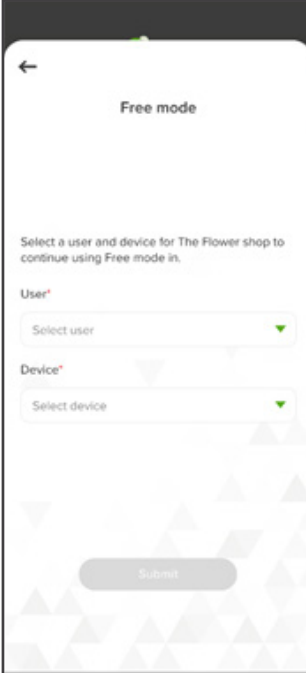
- System engineers will receive a notification telling them that the system has insufficient credits.
- Upon opening the app, system engineers will be advised they have run out of credits and will need to either purchase more or continue in free mode.

Purchase credits

If a system engineer chooses to purchase more credits, upon purchasing the credits the system will continue to work as normal.

Continue in free mode

If a system engineer chooses to continue in free mode, the system will revert to one user and one device. The system engineer will need to select which user and which device that should continue working.



The screenshot shows a mobile application interface for 'Free mode'. At the top left is a back arrow. The title 'Free mode' is centered. Below it is a prompt: 'Select a user and device for The Flower shop to continue using Free mode in.' There are two dropdown menus: 'User*' with 'Select user' and 'Device*' with 'Select device'. A 'Submit' button is at the bottom.

Once a selection has been made, only that user will be able to gain access through the selected door. All other users will be denied access, and the user selected will be denied access to other doors.

While in this state, any other devices and users will show as 'inactive'.

Adding credits to your system will enable the devices and users to work as expected again.

Paxton Solo - Using a phone to access a door

Overview

With Solo, there is no need to use a keyfob or card, your phone is the key.

To gain access to a door secured by Solo, you will just need to present your phone to a Solo DoorTag. There are subtle differences between the behaviour of iOS and Android devices to note.

Users are still able to gain access to a door if the user's phone has no internet access or there is a cloud outage.

Offline Access

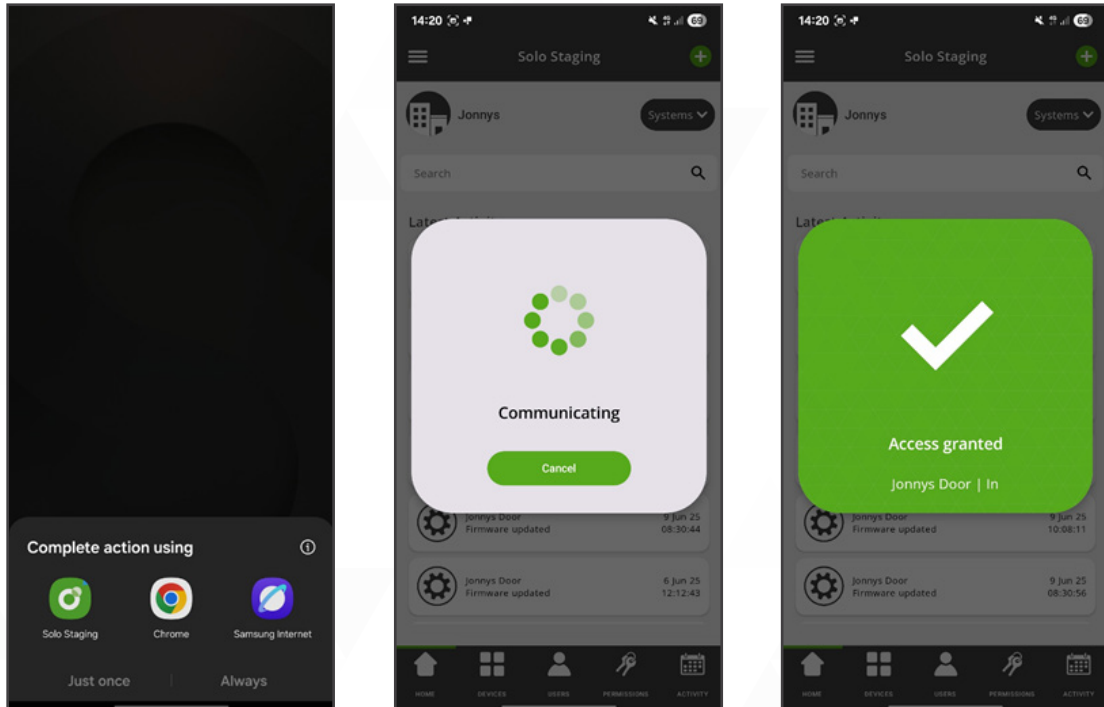
If a user's phone loses internet connection, or there is a cloud outage affecting Solo services, they can still access doors they have permission to for up to four and a half hours.

A special permission called '**keyholder**' can be given to select users. Keyholders can access all doors at any time, and their offline access lasts up to seven days. This permission should only be assigned to trusted users.

Gaining access with an Android device

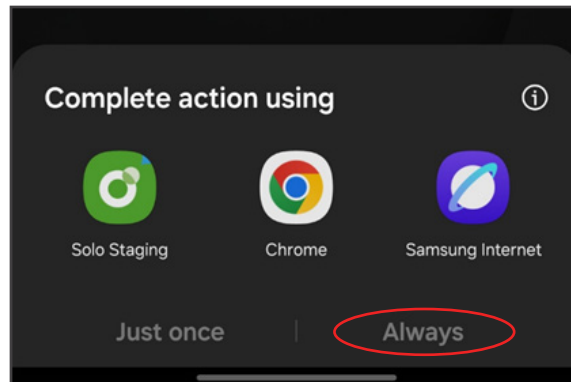
To gain access through a door on an Android device with Solo, simply present your phone to the Solo DoorTag and select Solo as the app you wish to use. The app will launch and grant you access if you have the correct access level.

Note: The Android phone must be unlocked to read the Solo DoorTag.



Here are a few tips to streamline this action:

- The NFC reader in an Android phone is typically on the back in the middle, so ensure your phone is held to the Solo DoorTag correctly.
- Android phones must be unlocked to read an NFC tag.
- When you present your phone to the Solo DoorTag, select 'Always' when prompted to use Solo. This ensures the app launches automatically and grants you access immediately in future.



Gaining access with an iPhone

There are several methods to gain access through a door on an iPhone.

Lock screen/home screen

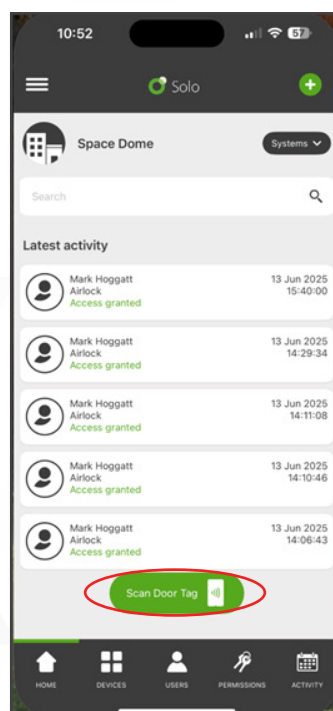
The first method is the same as using an Android phone, simply present your phone to the Solo DoorTag and tap the notification that pops up to launch the app and gain access to the door.

Note: Unlike Android, iPhones do not need to be unlocked to read the Solo DoorTag, however you must always tap the notification.

In-app

Within the Solo app, on the home screen tap on 'Scan DoorTag'. This will trigger an active scan of the Solo DoorTag, which will enable the Solo DoorTag to be read at much greater range.

This can be used in situations where the Solo DoorTag may be difficult to be read due to environmental factors.



Widgets

To trigger the 'Scan DoorTag' function from outside the app, you can add a Widget to your home screen. There is also a lock screen widget you can add.

To add the widget, press and hold on an empty space on your phone's home screen, tap 'edit' in the top and select add widget.

