



**KABA®**

E-PLEX® STANDARD  
SOFTWARE USER GUIDE, VERSION 3.2

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## Before you start installation

1. Internet Explorer 5.0 or higher must be installed on your computer.
  - All Windows XP Home or Pro (SP2) machines have newer versions of Internet Explorer.
2. Microsoft® Excel® version 2000 or higher must be installed on your computer.

**Warning:** The Microsoft Excel Starter Edition is not compatible with E-Plex Standard Software because it does not support Macros.

## CD Menu Items:

1. **System Requirements:** Select this item to verify the software installation compatibility issues.
2. **View User Guide:** Select this to access an electronic version of the E-Plex Standard User Guide on the CD and to view the On-Line Help of the software.
3. **Install Acrobat Reader:** Select this to install the free Adobe Acrobat reader, if you do not already have it installed on your system. You need it to view the manual.

The Actual product software – E-Plex Standard software and the PC M-Unit software below must be installed in all cases:

4. **Install E-Plex Standard software:** Select this item to install both the main E-Plex Standard application and the PC M-Unit Software on a single desktop or laptop PC.
5. **Optional - Install PC M-Unit software:** Select this item only when you want to install the PC M-Unit software on a separate PC Laptop or Netbook that will be used only as the PC M-Unit.

**After installation is complete, follow the on-screen instructions about re-starting your computer.**

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# Software Installation – Compatibility Issues

## Graphic Resolution

1. A minimum of 800 x 600 screen resolution is needed; higher the resolution, the better.
2. If your system is running on only 16-bit color resolution, some graphics may not be correctly displayed; change it to a higher resolution.

## E-Plex Standard– Application

### Excel - Lock Configuration Files

1. You must have Microsoft Excel 2000 or higher installed on your computer to edit pre-defined Lock Configuration Files. You will not be able to edit Lock Configuration Files unless you install Excel.
2. E-Plex Standard uses Excel macros to control the editing of your Lock Configuration Files. Hence the Excel macros should be enabled on your PC when running the E-Plex software.

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# E-Plex Standard Features

## [Software Version 3.2]

### Overview

#### What is Kaba's E-Plex Standard Software?

The E-Plex Standard is an application that will give you amazing flexibility and scope in using your regular Microsoft Excel files to configure, program, and audit a wide range and large number of doors.

The E-Plex Standard software enables you to program and audit Kaba's E-Plex 2000, 3000, and 5000 Series electronic pushbutton locks. Simply by using this software, the user of the E-Plex 2000, 3000, and 5000 Series can conveniently control door access for thousands of users.

- Maximum number of sites per system 10,000
- Maximum number of locks 10,000 across all sites
- Total number of unique access codes enrolled per lock 300 (100 for E2000)
- Total number of Audit events per lock 9,000 (3,000 for E2000)

The E-Plex Standard software enables you to:

- Create your information files for each door using Microsoft Excel based software.
- Use our Excel E-Plex templates provided for you to enter all possible configuration information on each lock series – E-Plex 2000, 3000 or 5000 Series Locks.
- Transfer the Excel files to a separate laptop or netbook PC if used as the PC Maintenance-Unit (PC M-Unit).
- Program and audit your locks using integrated PC M-Unit function or a separate PC used as the PC M-Unit.
- Use the product with minimal system requirements so that you don't need a complex configuration

#### Automatic Upgrade & User/Audit Capacity in E-Plex 5000:

- 1) All E-Plex 5000 Series Locks (new version 3 through older versions 2 and 1) come out of the factory with a capacity of 100 users and 3,000 audits. However, when you program these locks with the "E-Plex Standard" optional software via the PC M-Unit, the lock gets upgraded automatically to a capacity to handle 300 users and 9,000 audit events. This capacity upgrade in the lock is permanent and will not revert to the 100 users/3,000 audits even after a lock hardware reset. If you do not use the software but program the lock only via the lock keypad, the lock capacity is unchanged to the factory default of 100 users and 3,000 audits.
- 2) All E-Plex 3000 locks, on the other hand, come out of the factory with a capacity of 300 users and 9,000 audits. This is always the capacity of this lock, with or without the optional software.
- 3) Likewise, all E-Plex 2000 locks have a capacity of 100 users and 3000 audits with or without optional software.

The Lock Configuration Template is provided for you to enter the parameters of the locks you want to program, for example, Lock ID, Lock Name, Lock Function, Unlock Time, etc., and also the access codes of users who will have access to the door. This template is in the form of an Excel file, which is easy to create and very easy for you to store and manage. There is no need for a large, cumbersome database.

The Lock Configuration Template enables you to:

- Create and customize an Excel file for every lock in every site
- Copy one set of lock features to multiple doors so they all have the same parameters
- Copy one set of lock features to multiple doors but enter different users
- Configure up to 10,000 different doors across all sites
- Upload and download your Excel files using the integrated PC M-Unit function or to a separate PC used as the PC M-Unit for programming and auditing locks

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The Lock Audit File Template will be filled with audited events data automatically when you download audits from the lock to the PC M-Unit, and then transfer this information back to the E-Plex Standard Software on the PC for viewing or printing. If you manually added or deleted user codes etc. at the lock pushbuttons, you can download this updated door profile for this lock and synchronize the file back to its original lock configuration Excel file at the PC.

**Important:**

- 1) You can open the E-Plex related .xls files only from within the E-Plex Standard application for security reasons. If you try to open them directly from Windows Explorer or from the Excel application, you will not be able to open them. To see samples of these templates, see the examples in Appendix.
- 2) The E-Plex Standard lock configuration file data will override all manually configured data entered at the lock pushbuttons previously, every time you re-program the lock with the PC M-Unit.

**What do I need to run the program?**

- A standard desktop or laptop PC with an OS of Microsoft Windows 2000, XP Home & Pro, Vista<sup>®</sup>, or 7.
- Available USB port on above or separate PC laptop or netbook to support PC M-Unit programming.
- Microsoft Excel 2000 or higher.
- Kaba's E-Plex Standard program CD.

**What is the recommended sequence of operations?**

1. Install the E-Plex Standard and the PC M-Unit software from the CD, following the installation instructions.
2. Run the E-Plex Standard program on the PC and select login name and password.
3. Log in with your selected name and password – a minimum of 4 alphanumeric characters for login name and 6 for password.
4. Select the Main Folder.
5. Create Site(s) in the main Folder (E-Plex Standard).
6. Select the Lock Series you want to program – E-Plex 2000, 3000, or 5000 Series.
7. Create Lock Configuration Fields (including user data) for each lock in a Site.
8. Transfer Lock Configuration Data Files from PC to PC Maintenance Unit.
9. Program the locks using the PC Maintenance Unit.

**IMPORTANT:** You must change the default 8-digit factory Master code 12345678 in the lock to a different 8-digit Master code before doing any programming on the lock. **You must have the included USB cable connected to an available USB port on your PC M-Unit (Laptop or Netbook) to power EPS2000 (PowerStar) series locks when programming since there are no batteries to power the lock during programming.**

10. Audit the locks using the PC Maintenance Unit.
11. Transfer Lock Audit Data Files from PC Maintenance Unit to PC.
12. View and/or print Audit Files on PC.

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## Operators

After you provide your login and password, following the procedures in Log In and Select Password, you automatically become a Level 1 Operator in the E-Plex Standard system and are authorized to do everything with the system software. If you want to add another Operator or change a password, follow the procedure below.

**IMPORTANT: YOU MUST BE A LEVEL 1 OPERATOR TO BE ABLE TO EDIT OR CREATE OTHER LEVEL 2 OPERATORS. YOU CAN ONLY HAVE ONE LEVEL 1 OPERATOR AND TWO LEVEL 2 OPERATORS IN THE SYSTEM.**

If you are a Level 2 Operator, you can do everything, except that the System Setup / Operator Manager menu item is not available, as shown in the illustration below:



### How do I create and manage Operators?

1. Click on the System Setup menu, Operator Manager.



The following screen appears asking you for the Level 1 password:



To add an Operator, click on "Add" and the following appears:



The screenshot shows the "Operator Management" dialog box. It has a title bar with a close button (X). The dialog contains four input fields: "User Login" (a dropdown menu), "Operator Level" (a text box), "Password" (a text box), and "Confirm Password" (a text box). To the right of these fields are five buttons: "Add", "Edit", "Cancel", "Delete", and "Save". The "Add" button is highlighted with a yellow border and a mouse cursor is pointing at it. At the bottom of the dialog is a "Close" button.

2. To select an existing Level 2 Operator that you want to modify, select the Operator from the login pull down.
3. Now the Edit button is illuminated and the Password field can be edited.



The screenshot shows the "Operator Management" dialog box. The "User Login" dropdown menu now displays "Sandy". The "Operator Level" text box contains the number "2". The "Password" and "Confirm Password" text boxes are filled with three dots, indicating they are masked. The "Edit" button is now highlighted with a yellow border and a mouse cursor is pointing at it. The "Add" button is now grayed out. The "Close" button remains at the bottom.

4. You cannot change the Operator level (only one Level 1 Operator permitted) but you can change the passwords of Level 2 Operators.
5. Select a Level 2 Operator and enter a new password for this operator, then click Save.
6. To Add another second Level 2 Operator, repeat Step 1 and then click on Add.
7. The Add button becomes grayed out and the cursor moves into the User Login field.



The screenshot shows the "Operator Management" dialog box. The "User Login" dropdown menu is open, showing a list of operators: "jawa" and "Sandy". The "Add" button is now grayed out and a mouse cursor is pointing at it. The "Edit" button is now grayed out. The "Close" button remains at the bottom.

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8. Enter a Login Name and Password for the new Level 2 Operator and save.

If you try to add another Level 2 Operator, you will see the following screen where you cannot add, only edit or delete after selecting a user login name.



The 'Operator Management' dialog box features a title bar with a close button (X). It contains four input fields on the left: 'User Login' (a dropdown menu with 'kabalco' selected), 'Operator Level' (a text box with '2'), 'Password' (a masked text box with three dots), and 'Confirm Password' (a masked text box with three dots). On the right side, there are five buttons: 'Add' (disabled), 'Edit', 'Cancel', 'Delete', and 'Save' (disabled). A 'Close' button is located at the bottom center.

## Getting Started

### Create Main Folder

How do I create the main folder?

1. Click on the E-Plex Standard icon that appears on your PC desktop after installation.



The following dialog box appears which is the initial login screen:



The 'Username and Password Settings' dialog box has a title bar with a close button (X). The main text reads: 'The E-Plex Standard is a password protected application. You must set a password to be able to open the application. All Fields are required to perform the username and password settings'. There are two buttons at the top right: 'OK' and 'Cancel'. Below the text are five input fields: 'Username' (with 'jawa' entered), 'Password', 'Re-type Password', 'Security Question' (a dropdown menu with '(Select a Question to Answer)' selected), and 'Your Answer'.

Follow the procedure in Select Password and Log in (next page).

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## Select Password and Log in

1. In the “Username” box, type in the login name you want – minimum 4 alphanumeric characters.
2. In the “Password” box, type in the password you want to use – minimum of 6 alphanumeric characters.

The following screen appears:

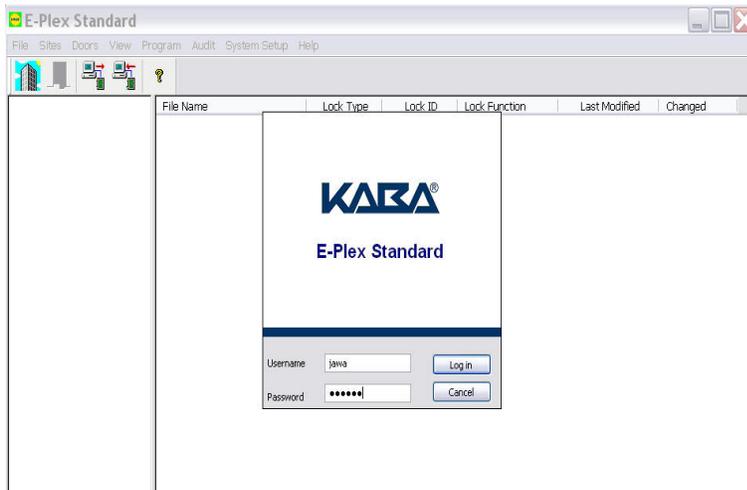


3. User names and passwords may be alphanumeric – numbers and letters only with a maximum of 20.
4. You will be asked to provide a password hint in case you forget your password. Select a question – the answer to it will be the trigger to enable you to select another password, in case you forget your original password.
5. For example, if you have a cat, select the first question “What is your pet’s name?” and then type in the answer in the field called Your Answer. Let’s say your cat’s name is Whiskey. Then if you forget your password, the system will ask for your pet’s name and if you answer correctly, you will be asked to reenter a new password and again select a password hint question and answer. Please store your (login) user name, password and password hint in a safe place for future retrieval and use, if you forget any of them.



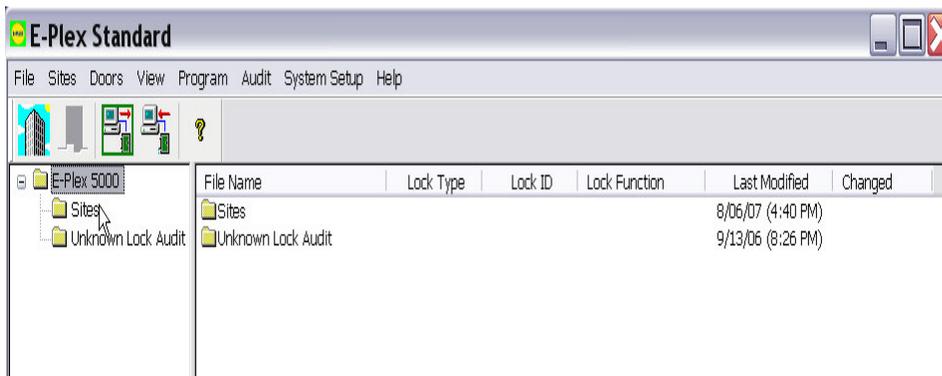
**WARNING: IF YOU FORGET BOTH YOUR PASSWORD AND THE ANSWER TO THE QUESTION, YOU WILL BE UNABLE TO USE E-PLEX STANDARD SOFTWARE. CONTACT KABA ACCESS CONTROL TECHNICAL SUPPORT.**

6. After you have entered all the required data, click on OK and the following login screen appears again.



7. Enter your Username and Password and click on Log in.

8. The following screen appears.



Now you can start using the E-Plex Standard software to add sites, doors, user codes, etc.

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## Lock Configuration and Lock Audit Templates

The Lock Configuration Template is provided for you to enter the parameters of the locks you want to program, for example, Lock ID, Lock Name, Lock Function, Unlock Time, etc., and also the access codes of users who will have access to the door. This template is in the form of an Excel file, which is easy to create, store and manage all applicable lock data. There is no need for a large, cumbersome database.

The Lock Configuration Template enables you to:

- Create and customize an Excel file for every lock in every site.
- Copy one set of lock features to multiple doors so they all have the same parameters.
- Copy one set of lock features to multiple doors but enter different users.
- Configure up to 10,000 different doors across all sites.
- Upload and download your Excel files to a handheld PC Maintenance Unit (PC M-Unit) for programming & auditing locks.

The Lock Audit File Template will be filled with audited events data automatically when you download audits from the lock to the handheld PC M-Unit, and then transfer this information back to the E-Plex Standard software on the PC for viewing or printing.

**Note:** To see all the categories available in this template for E-Plex 2000, 3000, and 5000 lock series see the examples in Appendix.

## Lock Functions

### E-Plex 2000 and 5000:

The E-Plex 2000 and 5000 locks can be defined to work in one of the following four BHMA (Builders Hardware Manufacturers Association) defined lock functions as shown below. **Important:** The lock will need to be set up at the keypad as such while still in factory mode. For further information on how to put the lock in one of the following four lock functions, please refer to the E-Plex 2x00/5x00 Lock Function Setup guide on how to set up these lock functions.

1. Entry Lock with Passage option can be a cylindrical lock without a privacy thumb turn or a mortise lock without a privacy deadbolt or an Exit device operator.
2. Storeroom Lock with no Passage option – can be a cylindrical lock without a privacy thumbturn or a mortise lock without.
3. Residence Lock, in Passage by default – can only be a mortise lock with deadbolt.
4. Privacy Lock – can be a mortise lock with a privacy deadbolt or a cylindrical lock with a privacy thumbturn.

The E-Plex 2000 and 5000 locks come from the factory with the lock function as an “Entry lock” by default, whether physically it is a cylindrical lock, a mortise lock or an exit device operator.

### E-Plex 3000:

An E-Plex 3000 lock can be defined to work in one of the following three Kaba defined lock functions as shown below.

1. Latch Holdback (with Passage option).
2. Swingbolt (with no Passage option).
3. Exit (with Passage option).

All E-Plex 3000 lock models come out of the factory with the lock function as “Latch Holdback” lock by default. Please refer to the E-Plex 3x00 Lock Function Setup Guide on how to setup these lock functions.

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## Enable Macros:

**WARNING: BECAUSE THE E-PLEX STANDARD APPLICATION USES MACROS TO OPEN ITS TEMPLATES IN THE MICROSOFT EXCEL APPLICATION, IT IS NOT COMPATIBLE WITH MICROSOFT'S EXCEL STARTER EDITION WHICH DOES NOT SUPPORT MACROS.**

Before opening templates, please note: The E-Plex Standard application uses macros to open its templates in the Excel Application. **For all Excel versions, 'Microsoft Excel Macros' must be enabled to use this product.**

**IN OLDER VERSIONS OF MICROSOFT OFFICE/EXCEL (OFFICE SUITES 2003 and 2007) YOU MUST ALSO VERIFY THE FOLLOWING:**

- 1) Make sure the 'MACRO SECURITY LEVEL' is set to Low. If it is not set to Low, then whenever you attempt to open a new door template or view an audit, you will not see any data.
- 2) Make sure the 'FIXED DECIMAL' option is Unchecked for cell formats.

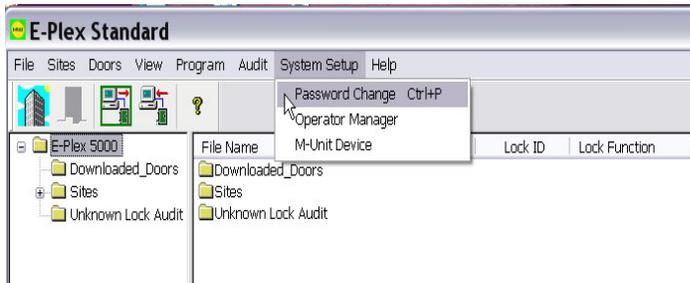
If you are unsure how to verify or change the above settings in your specific Microsoft Excel application, please search these terms using the Microsoft 'Help' pull down on your menu bar or refer to the Microsoft Excel software manual for your specific version.

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## Passwords

### How do I change a password?

1. Go to the System Setup item on the main menu and select Systems Setup and then Password Change, as shown below.



The following screen appears:



2. Enter your old password. The following screen appears:



3. Enter all the required data and click on OK. The password is now changed.

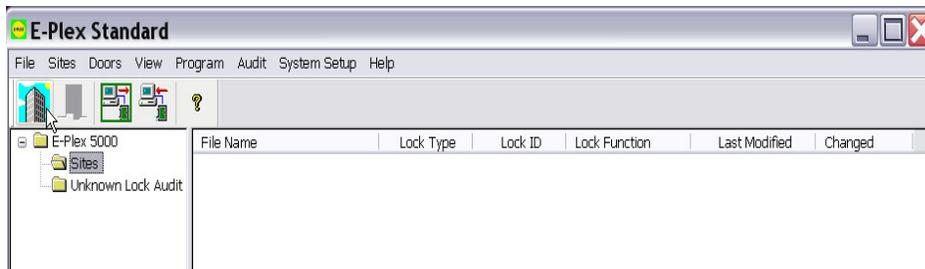
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## Sites

### Create Sites

#### How do I create Sites?

1. Log in to E-Plex Standard and the main window appears as shown below:



2. The Door icon is grayed out because you have not created any Sites or doors yet.
3. Click on the Sites icon or select New on the Sites menu.

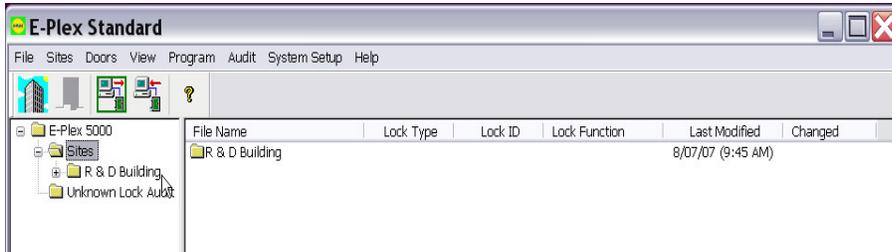


The following screen appears:



4. Enter a Site name – R. & D. Building, as in the example below.
5. Click OK.

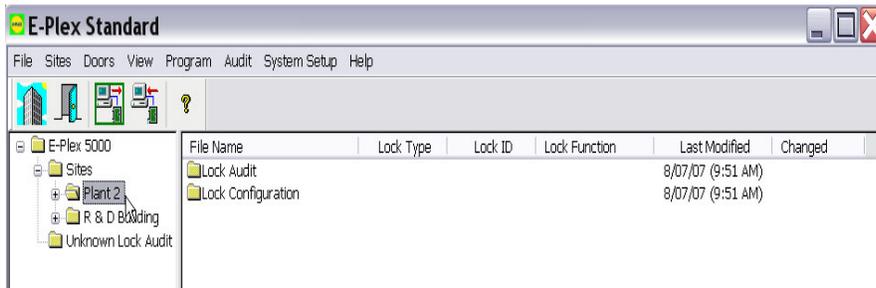
- The Site name now appears in the main Tree of sites and doors. Each Generated Site, by default will include Kaba pre-defined Lock Configuration and Lock Audit File Excel templates. The Door icon is now illuminated too. Now that you have a site, you can continue to Create Doors.



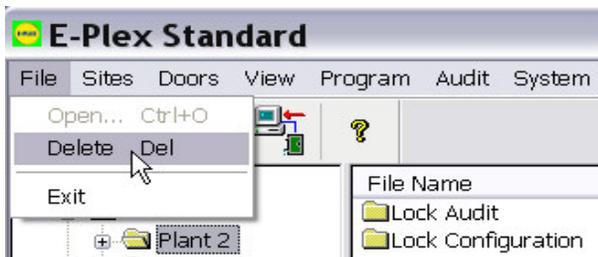
A Site should not normally be deleted until all sub-directors and files in the Site are deleted. You should delete all lock configuration and lock audit files in this site first and then follow this procedure to delete the Site. However, since there are times when you may want to delete an entire Site, it is possible to do so.

### How do I delete sites?

- Click on the Sites folder and the Sites appear in the right-hand panel.
- Select the Site that you want to delete.



- From the file menu on the main toolbar, select Delete, as shown below:



The following screen appears:



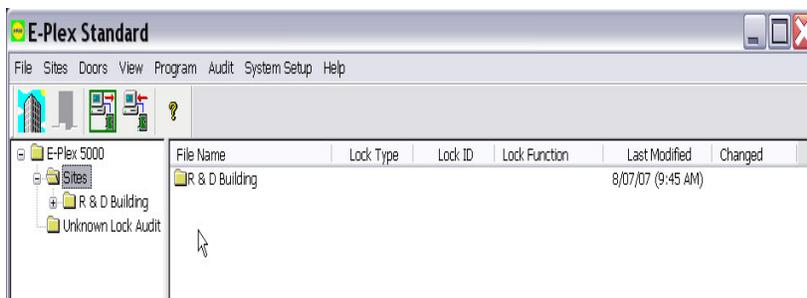
4. Click Yes.
5. When you click yes, the following screen appears:



6. Enter your password and click OK.
7. If the site is not empty, you will get a message. The following screen appears.



8. Click Yes or delete any Lock Configuration or Audit Files remaining at the site and then try again.
9. Observe that the Site has been deleted.



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# Doors

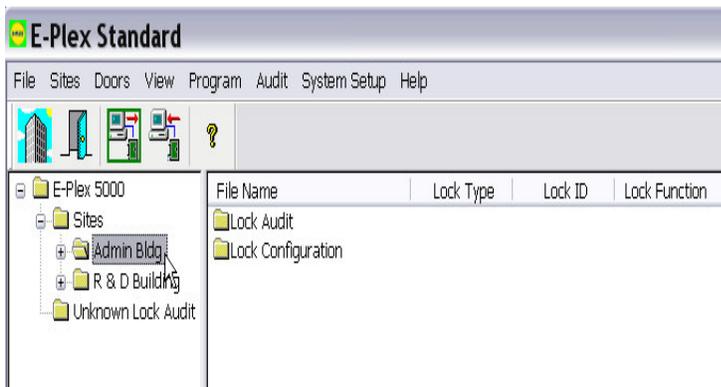
## Create Doors

**Note:** The procedure for creating a door is the same for all E-Plex 2000, 3000, and 5000 Series locks. All the examples shown in this section are for E-Plex 5000 Series locks.

Please see examples of Lock Configuration Excel Templates on pages shown in the appendix section before creating doors. There may be settings in your Excel applications that you need to change – one to enable macros and one to ensure that Fixed Decimals are not selected as a cell format.

### How do I create Doors?

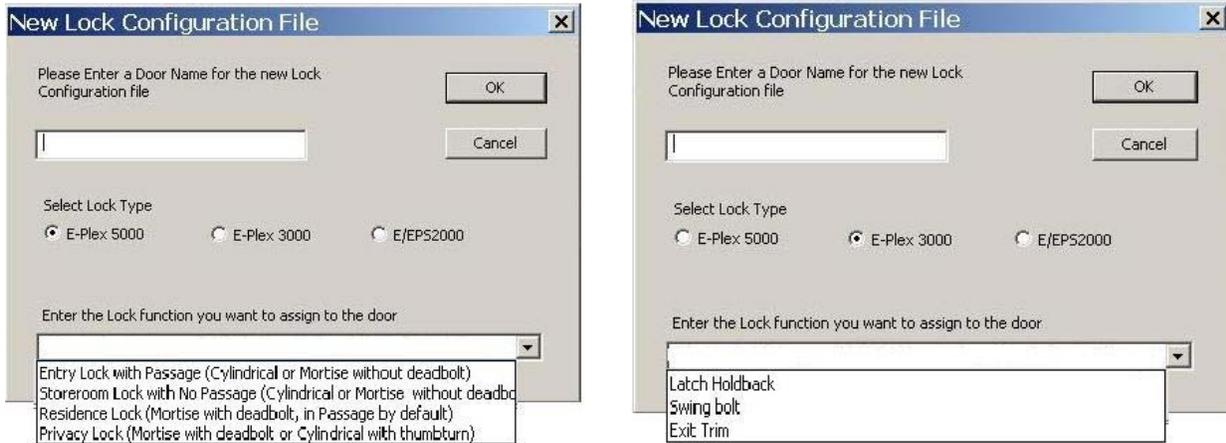
1. After you create a Site, the Site name appears in the tree at left under E-Plex Standard and two folders (directories) appear in the panel at the right, as shown below.
2. Select the Site, Admin. Bldg. in the example below:



3. Click on the door icon and the following screen appears:



- You must first select one Lock Type; either E-Plex 5000, 3000, or 2000 Lock Series. Enter a name for the Lock Configuration File and assign one of the four Lock Functions if it is E-Plex 2000 or 5000. If it is E-Plex 3000 assign one of the three lock functions.



- Microsoft Excel opens with a Kaba pre-defined Lock Configuration Form (the two templates in the application are Lock Configuration and Audit). You will see the same form for the Entry and the Storeroom locks and a slightly different form for the Residence and Privacy locks, each time you create one of these four types of new doors.

For detailed explanations of how these work and how much they can do, see Lock Configuration Templates on pages shown in the Appendix section.

**KABA** **E-Plex 5000** Version 3.0  
**LOCK CONFIGURATION**

Note: Editable cells are in yellow background **VERIFY DATA**

LOCK ID:  LOCK NAME:

LOCK FUNCTION:    
LOCK ID IN A RANGE FROM 0000 TO 9999

DOOR INFORMATION			
LOCK CONFIGURATION	VALUE	UNIT	RANGE
UNLOCK TIME	2	SECONDS	2 TO 20
BUZZER VOLUME	1	LEVEL	0 TO 3
TAMPER COUNT	4	ATTEMPTS	3 TO 9
TAMPER SHUTDOWN TIME	30	SECONDS	0 TO 90
PASSAGE MODE	DISABLED		ENABLED / DISABLED
PASSAGE MODE OPEN TIME LIMIT	9	HOURS	0 TO 24
ACCESS CODE LENGTH	4	DIGITS	4 TO 8
REMOTE UNLOCK	DISABLED		ENABLED / DISABLED

AUDIT FILTER INFORMATION			
ACCESS	ENABLED		ENABLED / DISABLED
MANAGER	ENABLED		ENABLED / DISABLED
SERVICE	ENABLED		ENABLED / DISABLED
ALL USERS	ENABLED		ENABLED / DISABLED
M-UNIT USER	ENABLED		ENABLED / DISABLED

- The lock name you gave the door appears automatically at top right – Main Entrance, in the example above and the Lock Function just below that.
- Assign an ID to the lock by typing it into the ID cell at top left. The ID must have 4 digits ranging form 0000 to 9999. The more doors you have or will have in the future, the lower you should start. To allow the maximum number of doors, start with 0001.

8. Change any or all of the shown default settings to make the file parameters describe your own door.
9. You can also select enabled/disabled of the audit filter info by using the pull down menu for the Value column of the table. That is, if you do not want to see or track any or all of the Manager(s) specific events, as an example, you can select "DISABLED" against the MANAGER row, under the AUDIT FILTER INFORMATION section.

<b>LOCK ID</b>	1001	<b>LOCK NAME</b>	Main Entrance
<b>LOCK FUNCTION</b>	Entry Lock with Passage (Cylindrical or Mortise without deadbolt)		

DOOR INFORMATION			
LOCK CONFIGURATION	VALUE	UNIT	RANGE
UNLOCK TIME	2	SECONDS	2 TO 20
BUZZER VOLUME	1	LEVEL	0 TO 3
TAMPER COUNT	4	ATTEMPTS	3 TO 9
TAMPER SHUTDOWN TIME	30	SECONDS	0 TO 90
PASSAGE MODE	DISABLED		ENABLED / DISABLED
PASSAGE MODE OPEN TIME LIMIT	9	HOURS	0 TO 24
ACCESS CODE LENGTH	4	DIGITS	4 TO 8
REMOTE UNLOCK	DISABLED		ENABLED / DISABLED

AUDIT FILTER INFORMATION			
ACCESS	ENABLED		ENABLED / DISABLED
MANAGER	DISABLED		ENABLED / DISABLED
SERVICE	ENABLED / DISABLED		ENABLED / DISABLED
ALL USERS	ENABLED / DISABLED		ENABLED / DISABLED
M-UNIT USER	ENABLED / DISABLED		ENABLED / DISABLED
PASSAGE & LOCKOUT MODE	ENABLED		ENABLED / DISABLED
DEADBOLT MODE	ENABLED		ENABLED / DISABLED

Also, add all your lock users in the same file, up to 300 users (100 users with E2000) with individual (unique) access codes, access types and names. If you want to delete a user's record (i.e., the code, name and access type, simply select and highlight these three cells for this user and press the delete button on the PC keypad. Two examples of the lock configuration templates are shown below, one for an Entry lock (standard cylindrical) and another for a Privacy lock (mortise and deadbolt) where a user or manager can be given a "privilege" to override the privacy deadbolt (thumbturn) if it was thrown from inside for added security; if the user/manger with a valid code is "disabled" to override the deadbolt, s/he cannot retract the deadbolt and unlock the door:

Example: "Entry" Lock

### E-Plex 5000 - User Information

USER NUMBER	ACCESS CODE	USER NAME	USER TYPE	USER STATUS	NO. OF HOURS OF ACTIVATION (SERVICE USER)	
001	9876	Carla Alexander	MANAGER	ENABLED		
+	002	6789	Mark Stevens	MANAGER	ENABLED	
	003	1234	Michel Morrissette	ACCESS USER	ENABLED	
	004	2345	Christin Craig	ACCESS USER	ENABLED	
	005	4567	Carlos D'Rosa	ACCESS USER	ENABLED	
	006	1122	Sue Schneider	MANAGER	ENABLED	
	007	3344	Jim Jamieson	ACCESS USER	ENABLED	
	008	6677	Vicky Brown	ACCESS USER	ENABLED	
	009			ENABLED		
	010	7777	Jawia	SERVICE USER	ENABLED	7
	011			ENABLED		
	012			ENABLED		
	013			ENABLED		

Example: "Privacy" Lock



## E-Plex 5000 LOCK CONFIGURATION

Version 3.0

Note: Editable cells are in yellow background

**VERIFY DATA**

LOCK ID 1002

LOCK NAME Payroll Dept

LOCK FUNCTION + Privacy Lock (Mortise with deadbolt or Cylindrical with thumbturn)

DOOR INFORMATION			
LOCK CONFIGURATION	VALUE	UNIT	RANGE
UNLOCK TIME	2	SECONDS	2 TO 20
BUZZER VOLUME	1	LEVEL	0 TO 3
TAMPER COUNT	4	ATTEMPTS	3 TO 9
TAMPER SHUTDOWN TIME	30	SECONDS	0 TO 90

### + E-Plex 5000 - User Information

USER NUMBER	ACCESS CODE	USER NAME	USER TYPE	USER STATUS	NO. OF HOURS OF ACTIVATION (SERVICE USER)	OVERRIDE PRIVACY
001				ENABLED		DISABLED
002	6789	Mark Stevens	MANAGER	ENABLED		ENABLED
003	1234	Michel Morrissette	ACCESS USER	ENABLED		DISABLED
004	2345	Christin Craig	ACCESS USER	ENABLED		DISABLED
005				ENABLED		DISABLED
006	1122	Sue Schneider	MANAGER	ENABLED		DISABLED
007				ENABLED		DISABLED
008	6677	Vicky Brown	ACCESS USER	ENABLED		DISABLED
009				ENABLED		DISABLED
010	7777	Jawa	SERVICE USER	ENABLED	7	DISABLED
011				ENABLED		DISABLED

10. When you have made all the desired changes, so that the template is now a description of your door, including all its users, save it.
11. Close the Excel file.
12. When you return to the E-Plex Standard application, the file is listed under your Lock Configuration Files for the Site name Admin. Bldg.
13. You can configure several doors in the Admin. Bldg. Site by assigning a Door Name, a Door ID and a Lock Function for each door, using the Excel form for each door's properties and users, and saving it.

You will see some sample Templates shown in the Appendix section.

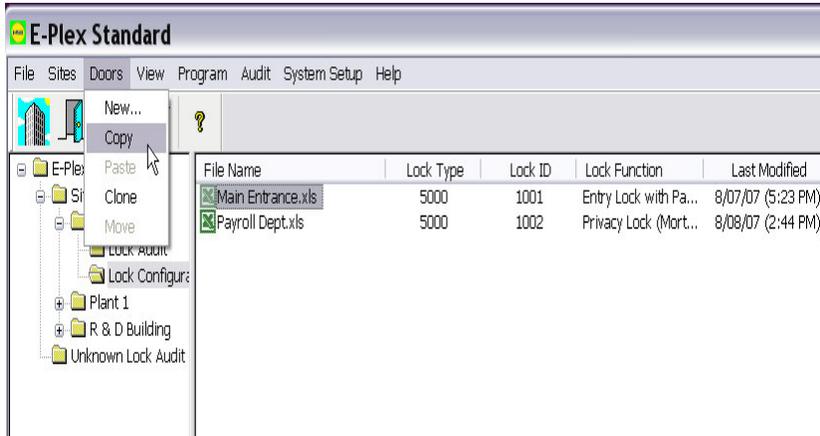
## Copy Doors

The Lock Configuration Template is provided for you to enter the parameters of the locks you want to program, for example, Lock ID, Lock Name, Lock Function, Unlock Time, etc., and also the access codes of users who will have access to the door.

If you have many doors at a Site with the same configuration, and perhaps even the same users, it would be time-consuming to fill out a configuration form for each door. You can copy one door's settings to the other doors, and only change the door ID and the door name.

## How do I copy doors?

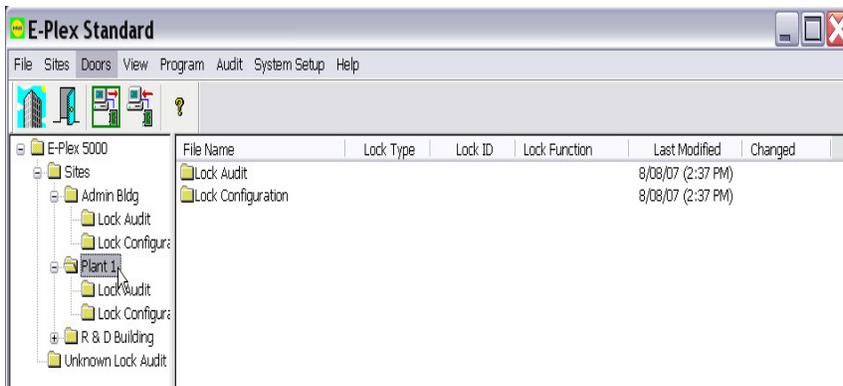
1. Select the door name by highlighting it.
2. Select Copy from the door menu.



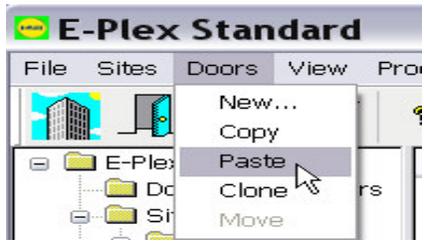
3. The following screen appears:



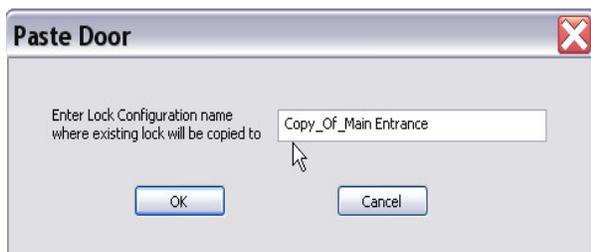
4. Select Site to paste this door in – Plant 1 Site in the example at the top of the next page:



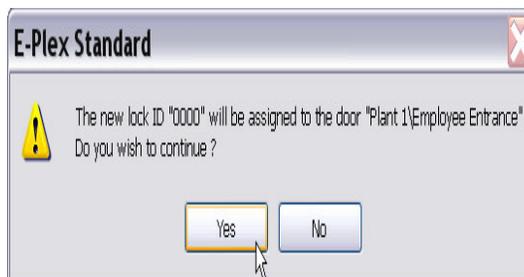
5. Click Paste on the Door menu.



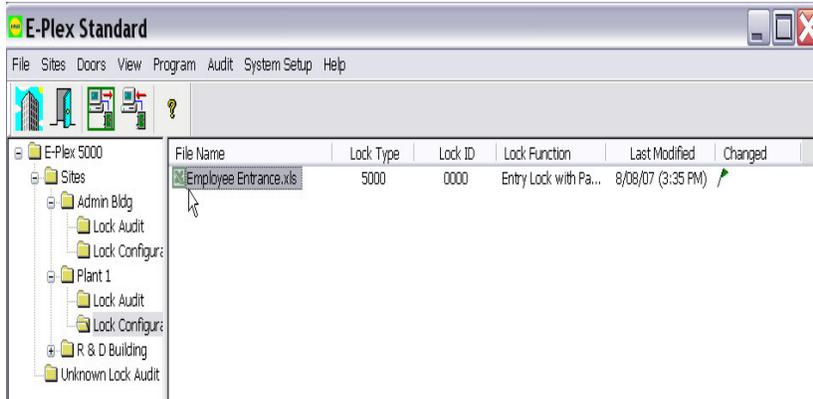
6. The following appears:



7. Enter the new name for the copied door, Employee-Entrance, for example.



8. The new copied door now appears on your Lock Configuration Files list as Employee-Entrance.xls.



9. Select and double-click on this door name. The Excel file opens.

**KABA** **E-Plex 5000** **LOCK CONFIGURATION** Version 3.0

Note: Editable cells are in yellow background **VERIFY DATA**

**LOCK ID**  **LOCK NAME**

**LOCK FUNCTION**

**DOOR INFORMATION**

LOCK CONFIGURATION	VALUE	UNIT	RANGE
UNLOCK TIME	2	SECONDS	2 TO 20
BUZZER VOLUME	1	LEVEL	0 TO 3
TAMPER COUNT	4	ATTEMPTS	3 TO 9
TAMPER SHUTDOWN TIME	30	SECONDS	0 TO 90
PASSAGE MODE	DISABLED		ENABLED / DISABLED
PASSAGE MODE OPEN TIME LIMIT	9	HOURS	0 TO 24
ACCESS CODE LENGTH	4	DIGITS	4 TO 8
REMOTE UNLOCK	DISABLED		ENABLED / DISABLED

**AUDIT FILTER INFORMATION**

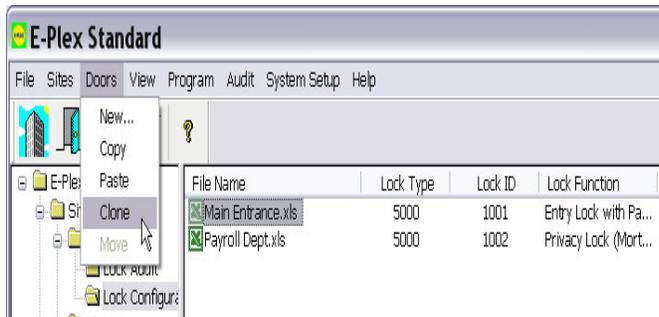
ACCESS	ENABLED	ENABLED / DISABLED
MANAGER	DISABLED	ENABLED / DISABLED
SERVICE	ENABLED	ENABLED / DISABLED
ALL USERS	ENABLED	ENABLED / DISABLED

10. **Important:** You must change the Lock ID from default 0000 to some other number, 5010 in the example above.

11. Now you have a new door (Employee-Entrance) in a new Site (Plant 1) that has all the same parameters including the lock function and all the same user codes and names as the one you copied from door Main-Entrance in site Admin. Bldg.

## Clone Doors

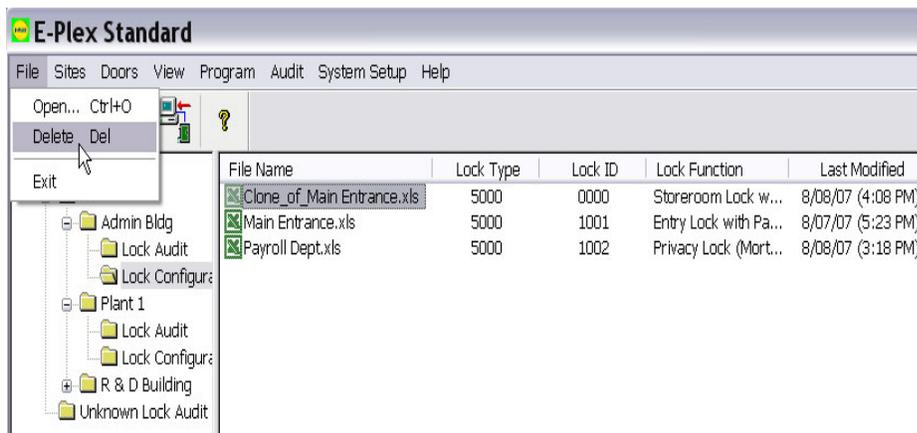
Cloning a door from an existing door is almost the same as the “Copy door” procedure above except for one thing. When you clone a door, you will also have the option to change the Lock function of the new door to be cloned to a different Lock function from the original door. Just like “Copy door” procedure as described above, you will need to re-name the lock name and lock ID after cloning the lock. The following is a screen shot of the door cloning procedures.



## Delete Doors

How do I delete doors?

1. Select the door(s) that you want to delete.
2. From the file menu on the main toolbar, select delete, as shown below.



The following screen appears:

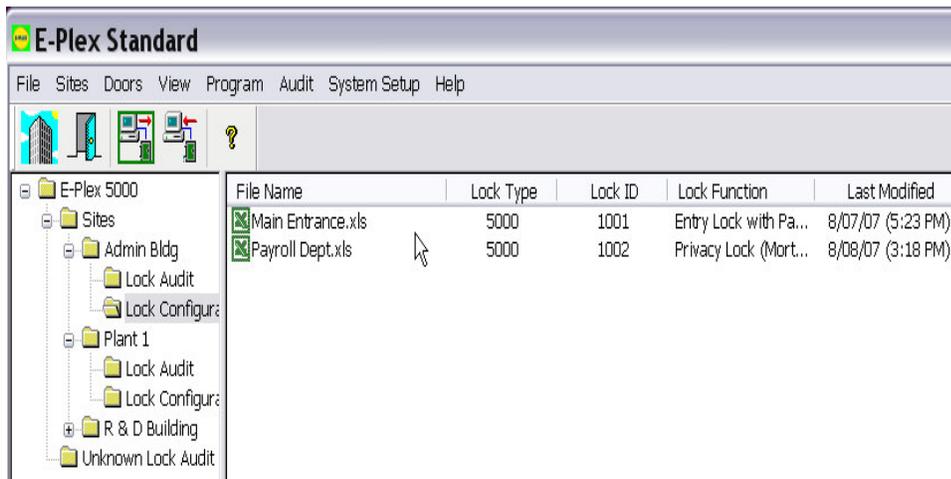


3. Click Yes.

4. The prompt will appear for each door you selected, asking if you're sure you want to delete it. You have to click Yes or No each time.
5. If you have a long list of doors, you can save time by clicking in the Apply to all checkbox. Then click on Yes and all doors will be deleted, or No and all doors will remain on the list.
6. Each time you select Yes (or if you select Apply to all, then Yes) the following screen appears."



7. Enter your password and Click OK.
8. Observe that the door(s) has been deleted.



## PC Maintenance Unit

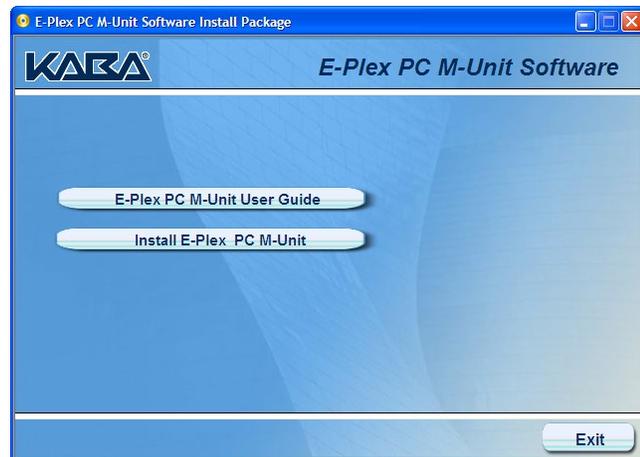
The PC Maintenance Unit (PC M-Unit) is Kaba's term for a laptop or netbook PC equipped with Kaba's PC M-Unit software and USB->IrDA adaptor that communicates with the locks via infrared signal. The PC M-Unit is either running with the Standard Software on the same laptop or a separate PC that requires a USB flash drive to transfer lock data to/from your PC running the Standard Software.

The IrDA adaptor's infrared transceiver (red lense), when aligned with the red lense above the keypad of the E-Plex 2000, 3000 or 5000 lock, will transfer data from the PC M-Unit to the lock, or vice versa – from the lock to the PC M-Unit – in the case of lock audits or door configuration downloads.

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The operations involving the PC Maintenance Unit are the following:

- Create Lock Configuration Files (including user data) for each lock (E-Plex 2000, 3000 or 5000) in a Site.
- Transfer Lock Configuration Data Files from PC to PC Maintenance Unit.
- Program the locks using the PC Maintenance Unit.
- Under Preferences on the pulldown menu, obtained by Clicking on the title E-Plex Standard at the top left of the PC M-Unit screen, select the number of records to audit – 500 is default, 50 is minimum and 9,000 is maximum.
- Audit the locks using the PC Maintenance Unit.
- Transfer Lock Audit Data Files and/or the Door Configuration Data Files from PC Maintenance Unit to PC.
- View and/or print audit Fields on PC.
- Re-synchronize the downloaded door files with the corresponding lock files on the PC so that data in both are identical.



Refer to the ***E-Plex PC M-Unit User Guide*** (which is available to view from the flash drive menu above) where operations using the PC M-Unit are described in detail to perform the following procedures:

1. Transfer Files from main PC to PC Maintenance Unit.
2. Transfer Files from the PC Maintenance Unit to the Locks to program locks.
3. Audit Locks.
4. Transfer Lock Audits from the PC Maintenance Unit to the main PC.
5. Download Door (lock) configurations from locks.
6. Transfer Downloaded Door configurations files from the PC Maintenance Unit to the main PC.

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## Portable PC M-Unit with Kaba's IrDA Kit

The "M-Unit" is Kaba Access Control system's term for a PC based portable unit that communicates with the locks through industry standard infrared (IrDA) interface by making use of *Kaba' PC M-Unit Communications Kit*. This kit with the USB->IrDA adaptor, USB extension cable, and flash drive containing the PC M-Unit software is included in your Standard Software Implementation Kit or can be purchased separately if a second PC M-Unit is desired.

The kit contains the following items in the package



**IrDA Adapter**



**USB Extension Cable**



**USB Flash Drive**



**Netbook PC (as portable M-Unit)**

1. An industry standard **IrDA** (*Infrared Data Access*) **adapter** with a **USB** interface to connect to the M-Unit PC,
2. A **USB extension cable** to connect the above IrDA adapter to the M-Unit, if need be, and
3. A **USB flash drive**, preloaded with the *E-Plex PC M-Unit software* application along with its *User Guide* in electronic format,
4. A 2-page "Getting Started" sheet in color as a quick reference guide.

One end of the IrDA adapter plugs in to one of the M-Unit's USB ports and the other end of the IrDA transmit/receive infrared data window will be pointed at the E-Plex lock's IrDA window to transfer required data between the M-Unit and the lock.

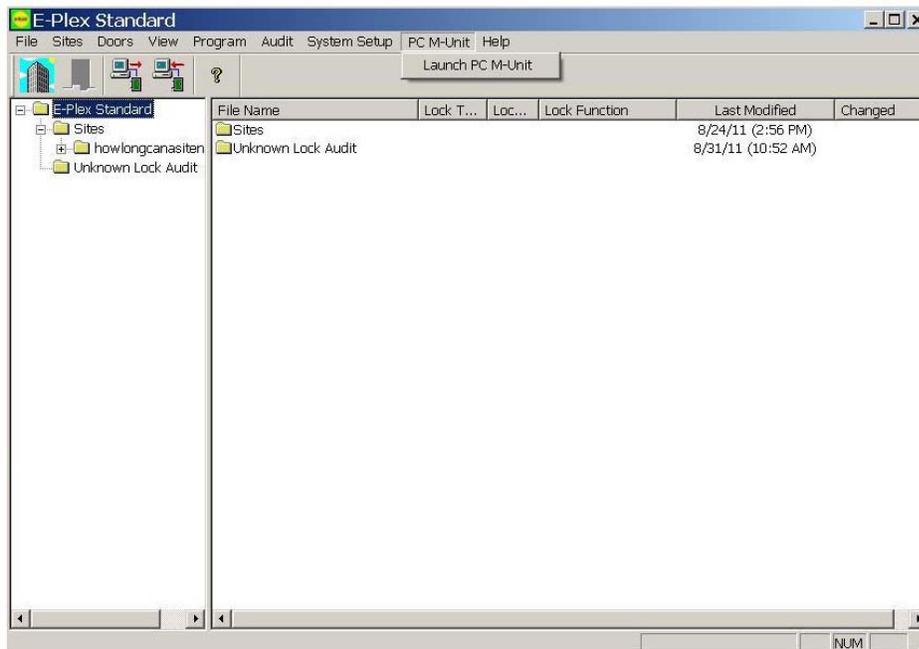
The USB memory drive will be used (after installing the PC M-Unit software on the separate Netbook PC) to store and transfer the lock configuration data and the audited events data between the M-Unit and the Host PC where the main E-Plex Standard Software application and its locks/user access configuration database reside. The USB flash drive will be used as a portable transport medium between the two separate PCs – i.e., between the Host PC and the portable PC M-Unit.

**Note:** If on the other hand, you use the same laptop which contains the main E-Plex Standard applications and the M-Unit applications (built-in), you will not need the flash drive to transfer data; this is because this data transfer and syncing occur within the same laptop's hard-drive.

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## PC M-Unit Software Installation

**Important:** If you are using one/same (“integrated”) portable PC where the E-Plex Standard software was installed, you can click ‘Launch PC M-Unit’ from the Menu Bar per the image below at any time to launch the PC M-Unit application. Please skip the next few pages and go directly to the PC M-Unit Main Menu screen on Page 35. This is because the E-Plex PC M-Unit part of the software already resides within the main E-Plex Standard software and so no separate PC M-Unit installation is required.



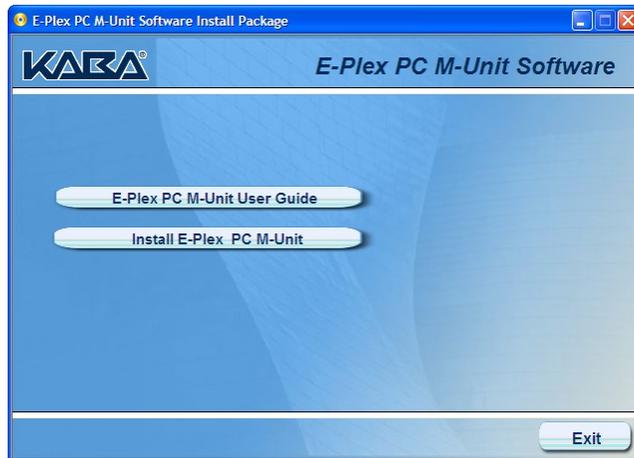
**NOTE:** The procedure on the following 4 pages is for installing the PC M-Unit part of the software on a separate portable Netbook or mini laptop; the E-Plex Standard software should have been already installed and running on the Host PC.



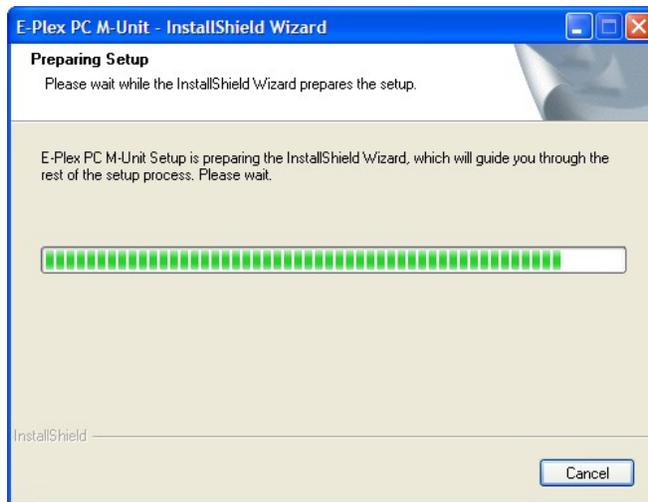
**Note:** This same PC M-Unit installation procedure can also be found in the *E-Plex PC M-Unit User Guide* (front cover pictured above). It is described in this document for convenience. Please also refer to the included 2-page color, *E-Plex PC M-Unit Getting Started* sheet as a quick reference guide.

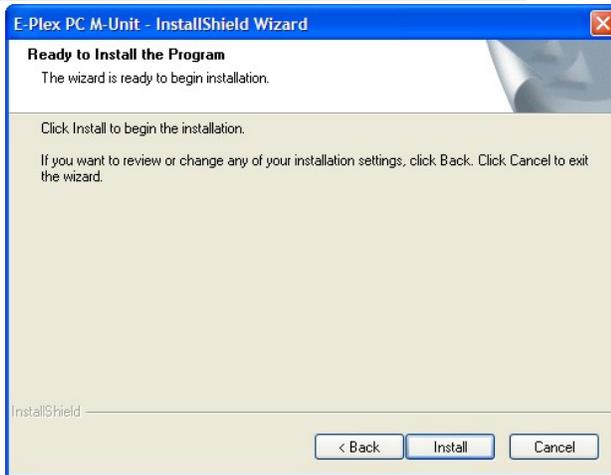
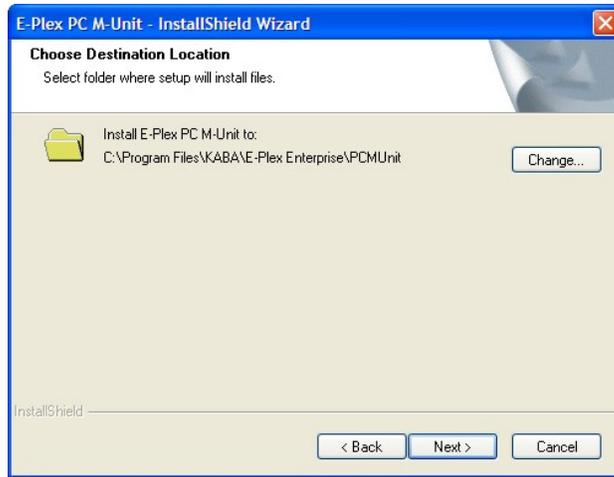
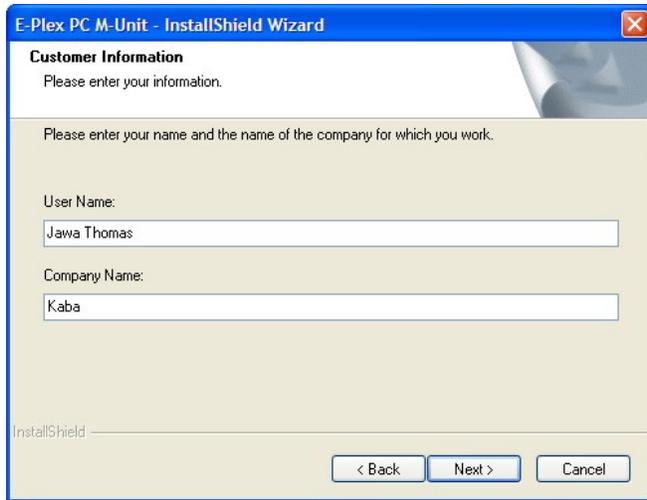
- The *E-Plex PC M-Unit Software* and the *PC M-Unit User Guide* are located on the USB flash drive that comes with *Kaba's PC M-Unit Communications Kit*.
- Plug in this USB drive into one of the USB ports of your dedicated PC M-Unit (Laptop or Netbook PC).
- In a few seconds, you will see the following screen on your M-Unit portable unit. Ensure that “*Show Kaba's E-Plex PC M-Unit Software ...*” is highlighted. Click *OK* to continue which will open the next window, giving you an option to either view/print the *PC M-Unit User Guide* or install this software.

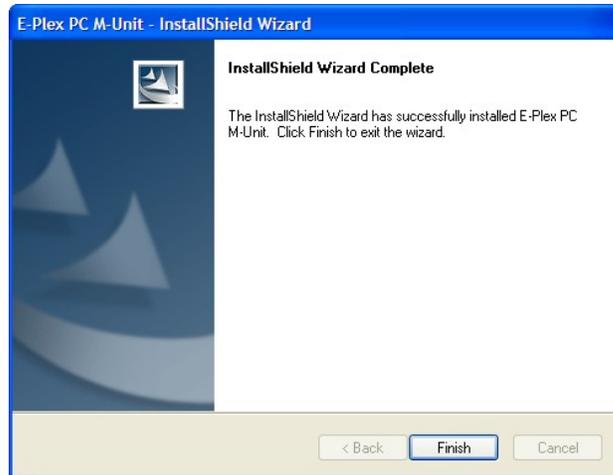




- When you click “*Install E-Plex PC M-Unit*” tab, the software installation process will begin and you need to just follow the instructions on the screen. The following are a few screen shots taken during the install process. Click *Finish* when done.



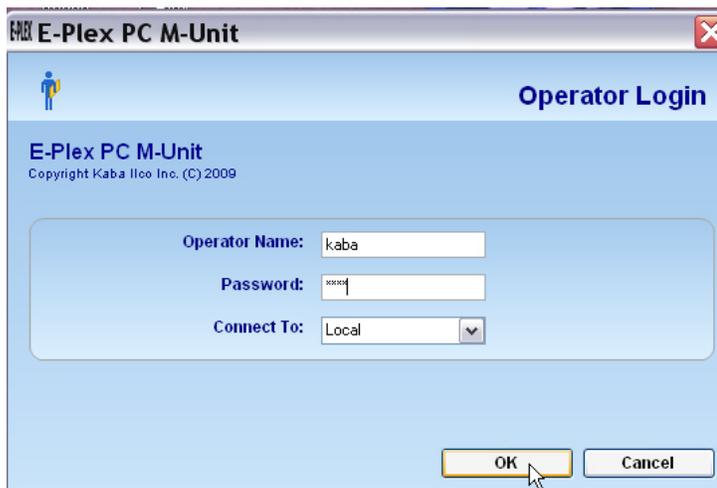




- The E-Plex PC M-Unit software is now installed on your separate M-Unit portable unit and the program's icon will be displayed on your PC M-Unit's Desktop as shown below. Whenever you want to run this program, double click on this icon.

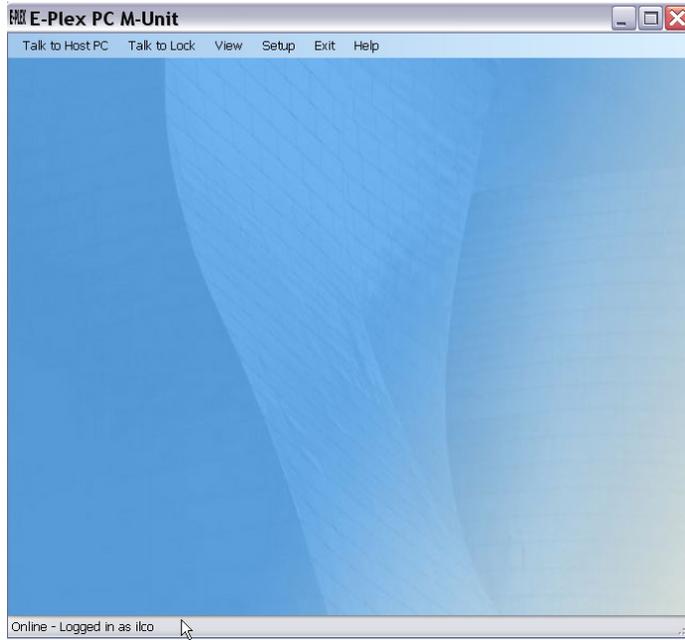


- For the very first time of PC M-Unit login, the one-time default login User name is "kaba" and the default Password is also "kaba". When you click OK, the PC M-Unit software will automatically import your Operator Name and Password from the Host PC.



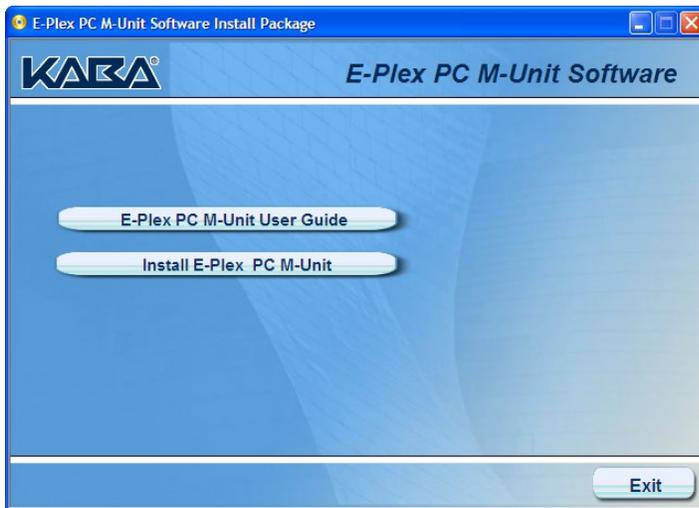
After clicking **OK**, you will see the **PC M-Unit Main Menu Screen** on the following page.

## PC M-Unit Main Menu Screen



From this point on, please refer to the **E-Plex PC M-Unit User Guide** on how to perform the data transfer to perform the tasks on the next page in more detail.

The E-Plex PC M-Unit user guide is included as an electronic document on the USB flash drive of the **E-Plex PC M-Unit kit**, or once installed can be selected from the **PC M-Unit menu bar** under 'Help'.



Or



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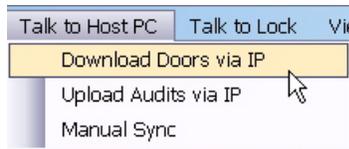
## Operations to Perform in the *PC M-Unit Software*:

The main operations involving the M-Unit are the following:

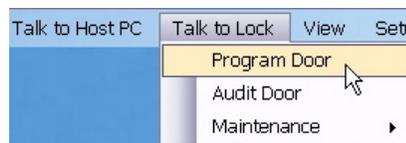
- (i) Downloading doors/users access configuration data to the M-Unit from the Host PC
- (ii) Programming the doors (locks) using the M-Unit via IrDA
- (iii) Auditing the doors (locks) using the M-Unit via IrDA
- (iv) Uploading doors' configuration info and audits to the Host PC from the M-Unit
- (v) Performing lock maintenance/diagnostics via IrDA

The following are a few sample screens showing the PC M-Unit sub-menus from where you will launch the (i) through (v) PC M-Unit tasks mentioned above.

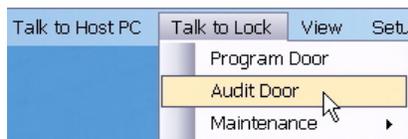
(i)



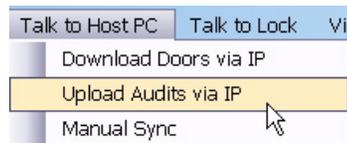
(ii)



(iii)



(iv)



(v)



## M-Unit User

The E-Plex 2000, 3000, and 5000 locks use a special 4-digit only Maintenance Code called the M-Unit User Code. This code is used only to program and/or audit the lock using the PC M-Unit as a maintenance function only – the code will not open the door.

By default, the 4-digit M-Unit User Code is de-activated in the lock. The code cannot be activated and assigned from the software – it has to be assigned a 4-digit code and then activated by the Master or any one of the Managers at the lock's pushbuttons.

For example, if 87654321 is the Master Code and the new M-Unit Code to be assigned is 7777, the following two commands must be entered at the lock: #87654321#103#7777#7777## (to assign new M-Unit Code first), and then #87654321#303## (to activate it).

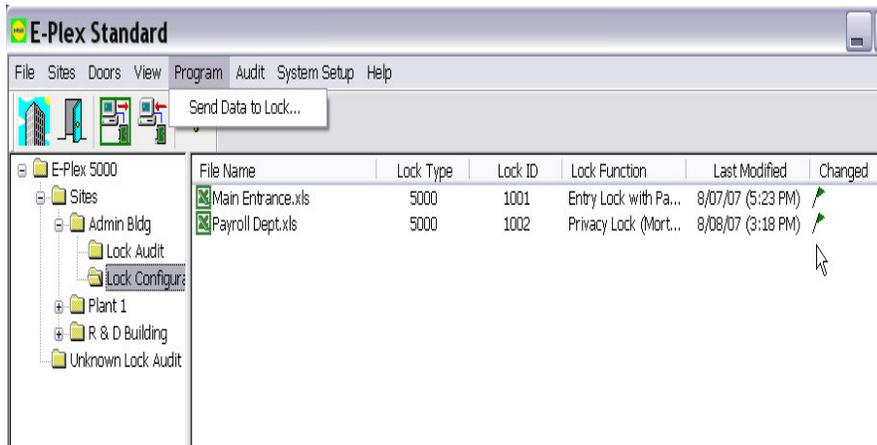
If you ever need to de-activate it, the command is 403 (which replace the 303 in the above example). An example of the M-Unit User Code usage at the lock is as follows: ##7777 (Note: there is an extra # at the beginning of the code). The lock will enter the Communications Mode to interface with the PC M-Unit, indicated by alternate green and red flashing LEDs.

# Programming, Auditing Locks, and Downloading Lock Profiles

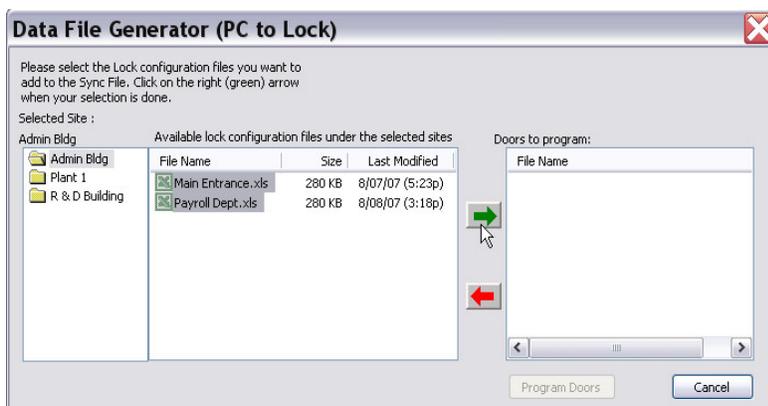
## Transfer Files – PC to PC Maintenance Unit

### How do I transfer files to the PC M-Unit?

1. Go to the Program Menu of the main dialog box and select Send Data to Lock. You will see the box below with various sites and their locks in the system. Any door(s) whose lock configuration data has changed that needs to be sent to the door(s) for programming the lock(s) is indicated by a small green flag icon against the affected door name(s) under the “Changed” column:



2. To generate a sync file (to prepare to transfer it to the PC M-Unit) you must select the Site name where the door or doors need to be programmed.
3. Select by clicking on the Site name.

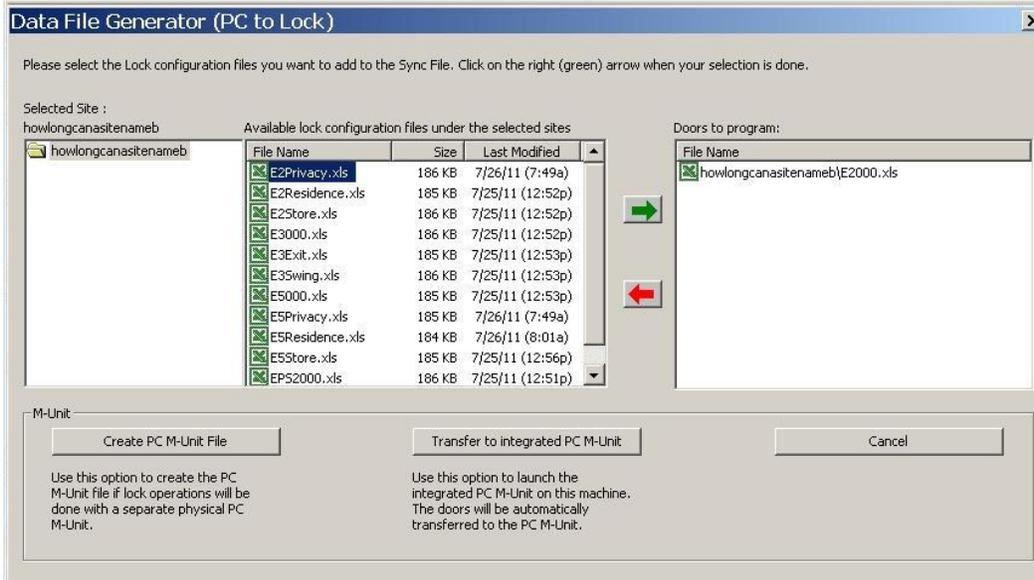


4. Select each Lock Configuration File, and then click on the green right-pointing arrow button to move it to the “Doors to program” column. The file moves to the right-hand panel. Using the Shift key, you can select several files and move them all at once.

5. If you make a mistake and move a file unintentionally, highlight this file and then click on the red left-pointing arrow to move the file back.

**Note:** If you have mistakenly given two doors the same ID and you try to program them both, you will receive a warning message to alert you to the fact.

6. Then click on the appropriate PC M-Unit button.



6.1 **If using an Integrated PC:** If you use the same (“integrated”) laptop/Netbook PC to run both your Standard and PC M-Unit software applications, click on the ‘**Transfer to integrated PC M-Unit**’ button.

6.2 **If using Separate PC & MU Laptop/Netbook:** If on the other hand you use separate PCs – one PC where the E-Plex Standard software is installed and the other portable PC where the PC M-Unit software is installed, your common folder must be located on the USB flash drive. The USB flash drive will be used to transfer the locks’ configuration and the locks’ audit data between the two PCs. Click on the ‘**Create PC M-Unit File**’ button to create the common file you plan to use.



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For further details on how to setup and use the PC M-Unit software, either on your “integrated” PC laptop or on your separate PC (running E-Plex Standard applications) and a laptop/Netbook (running PC M-Unit applications) in conjunction with Kaba’s PC M-Unit (IrDA) Communications kit, please refer to the PC M-Unit Software User Guide that comes with this kit as an electronic document.



## Transfer Lock Audits from the PC M-Unit to the PC

**This procedure is the same for E2000, E3000, and E5000 Series Locks.**

1. Once you have retrieved the audit information from the lock using the PC M-Unit, go back to the Standard Software on the PC. Go to the Audit button on the icon bar, or Audit followed by Receive Audit from Lock on the tab menu, and click.



---

This will display a dialog screen with two boxes, the first one being “Read Lock Audits” and the other one being “Read Downloaded Doors”; ensure that the Read Lock audits box is checked (by default both the boxes are checked and then click on OK.



2. If no new audits have been performed on the PC M-Unit, you get a message to that effect:

**OR**, you receive a message telling you that a new audit has been downloaded since you last used the E-Plex Standard.



3. Click on the Site of the lock(s) where you performed the audit.

4. Click on the Lock Audit folder for that site.

5. The door files from the last audit appear, so you can open each file and see the audit information – an example is shown in the Appendix section.

6. If a door was audited and it does not belong to a Lock Audit File on your desktop, it is automatically sent to the folder called Unknown Lock Audit, where you can view it and decide where to put it.

## Lock Audit – Example

Each E-Plex 2000 lock is designed to store up to 3,000 audit events; the E3000 and E5000 Series' audit event capacities are 9,000 audit events. The audit file is circular and the oldest record is overwritten by the most recent. A hard reset does not clear the audit trail.

Example of Audit Sequence:

Here is an example of an Audit Sequence – the most recent activities are shown first.

- Numbers in bold do not appear on audit but are used here to show the sequence of reported actions.
- Because the length of the access code can be changed from 4 to 8, all codes are shown as 8-digit numbers, the first digits are shown as leading zeros if the code is less than 8 digits.

Audit from an E-5000 “Entry” Lock:

KABA®		E-Plex 5000 LOCK AUDIT			Version 3.0		
				<b>DATE OF REPORT :</b>	08/20/2007 13:54:34		
<b>LOCK FUNCTION</b>	Entry Lock with Passage (Cylindrical or Mortise without deadbolt)						
<b>LOCK NAME :</b>	Main Entrance	<b>LOCK ID :</b>	1001	<b>FW Version :</b>	2.12		
<b>FILE NAME :</b>	Main Entrance Mon Aug 20 2007 13h 54min 34s.xls	<b>EVENTS :</b>	100	<b>Lock Battery :</b>	Good		
LOCK RECORDS INFORMATION							
DATE	TIME	TRANSACTION DESCRIPTION	USER #	USER ACCESS CODE	USER NAME	USER TYPE	USER STATUS
8/20/2007	1:54:08 PM	MUnit communication started	Master Code	****	Master Code	Master Code	N/A
8/20/2007	1:53:54 PM	Manual programming started	Master Code	****	Master Code	Master Code	N/A
8/20/2007	12:09:18 PM	Lock opened on valid access code	004	00002345	Christin Craig	Access User	Enabled
8/20/2007	12:09:14 PM	Lock opened on valid access code	005	00004567	Carlos D'Rosa	Access User	Enabled
8/20/2007	12:09:00 PM	Lock opened on valid access code	007	00003344	Jim Jamieson	Access User	Enabled
8/20/2007	12:08:54 PM	Lock opened on valid access code	001	00009876	Carla Alexander	Manager	Enabled
8/20/2007	12:08:50 PM	Lock opened on valid access code	008	00006677	Vicky Brown	Access User	Enabled
8/20/2007	12:08:46 PM	Lock opened on valid access code	006	00001122	Sue Schneider	Manager	Enabled

Mandatory events are always logged, but “optional” events will be logged only if they are enabled through “audit filters” in the software. By default, all audit filters are enabled. To disable an audit filter, go to the lock configuration file for the respective lock in the E-Plex Standard software and change the setting from “enable” to “disable”.

---

The Lock Audit feature will track the following types of lock transactions:

Mandatory Audit Events

<b>Events</b>	<b>PIN Code Shown</b>
Master's combination modified	Modified Master User's PIN code*
Manual Programming Mode	PIN code that was used to state the Manual Programming Mode
PC M-Unit Communication started	PIN code that was used to start the Communication Mode
Lock opened with valid access code	PIN code that was used to open the door
Manual Programming Mode ended	N/A
Audit report retrieved	N/A
PC M-Unit Communication ended	N/A
PC M-Unit Communication ended	N/A
Key override usage detected	N/A
Hard reset	N/A
Set date	N/A
Set time	N/A
Save old date/time (1)	N/A
Invalid Code (2)	Invalid PIN code
Shutdown Time period	Last invalid PIN code
Tamper Shutdown Time period ended	N/A
Lock Shutdown at low voltage	N/A
Battery connected	N/A
Low battery warning started	N/A
Deadbolt engaged	N/A
Deadbolt retracted	N/A
Remote Unlock Open	N/A

\*Master and PC M-Unit PIN codes are not shown in audits for security reasons.

- (1) In an audit sequence, this transaction will always precede "Set Date" and "Set Time" audit event. This enables the person reading the audit to know if there was a time lapse (e.g. When it took more than 2 minutes to replace batteries) between the original date/time and the new date/time that was set.
- (2) This transaction is during Tamper Shutdown time following the configured maximum number of invalid codes entered. Each time an invalid code is keyed in during this period, the Shutdown Time is restarted, so that an invalid user can never gain access to the lock entering a series of invalid codes until he hits the right one.

Audit Event	Optional Audit Filters					
	Access	Manager	Service	All Users	PC M-Unit Users	Passage & Lockout
Add Access User	X					
Enable Access User	X					
Disable Access User	X					
Delete Access User	X					
Add Manager User		X				
Enable Manager User		X				
Disable Manager User		X				
Delete Manager User		X				
Add Service User			X			
Enable Service User			X			
Disable Service User			X			
Delete Service User			X			
Expired / Deleted Service User (3)			X			
Enable All Users				X		
Disable All Users				X		
Delete All Users				X		
Modify PC M-Unit User Combination					X	
Activate PC M-Unit User					X	
Deactivate PC M-Unit User					X	
Enable Passage Mode						X
Disable Passage Mode						X
Enable Lockout Mode						X
Disable Lockout Mode						X

**X indicates that when this filter is enabled, the respective events in the left column will appear in the audit report. By default, all audit filters are enabled.**

#### Optional Audit Events

- (3) This is the audit record of a service user whose time has “expired”, whereas “Deleted Service User” logs the Service User who is manually deleted through the Manual Programming Mode.

## Download Lock Profiles

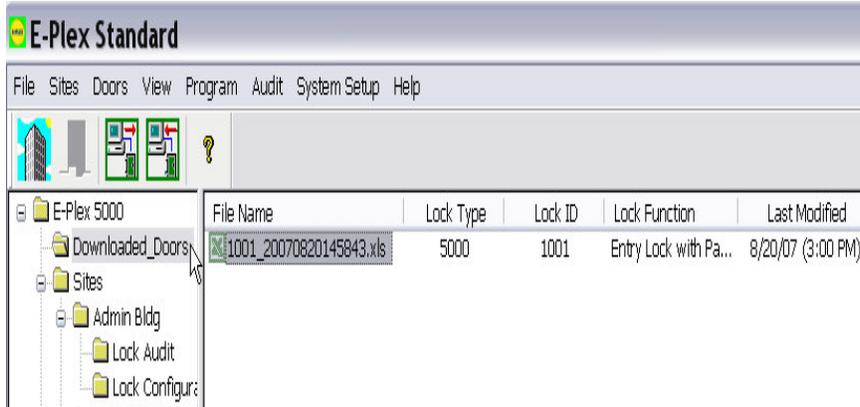
This feature of downloading a lock configuration data profile and then transferring this information back to the main PC is used for the following reason. After programming a lock from the software via the PC M-Unit, if the Master or a Manager added and/or deleted any user codes at the lock pushbuttons, this updated information at the lock is not the same as that in the PC for this lock. Now you have an opportunity to synchronize this updated lock data with its corresponding Excel template data at the PC so that you always have the fully updated and matching lock configuration data both in the PC and in the lock memory. If there is no matching lock ID on the PC side for this downloaded lock, this downloaded lock profile file will be stored in a folder called Downloaded Doors as a lock configuration Excel template file. You are free to move this file to any existing Site / Lock Configuration folder and use it to program any lock after giving it a Lock name, Lock ID etc.

Follow the same procedure as before for downloading lock audits as described on pages 39 and 40, but select Download Door this time...follow the PC M-Unit screen prompts as before and download the door profile.

## Transfer Downloaded Lock Profiles from the PC M-Unit to the PC

Follow the same procedure as before for transferring downloaded lock audits from the PC M-Unit to the PC as described in the PC M-Unit User Manual. This time ensure that the Read Download Doors box is checked and then click on OK. As described above, if there is a matching lock ID in an existing Site / Lock Configuration folder this downloaded file will be automatically synchronized with its corresponding template on the PC if you click on the election to overwrite it. If there was no matching file found on the PC, this downloaded door profile will be stored under the folder Downloaded Doors.

## Downloaded Lock Profiles – Example



### E-Plex 5000 LOCK CONFIGURATION

Version 3.0

Note: Downloaded configuration is READ ONLY

VERIFY DATA

LOCK ID: 1001

LOCK NAME: 20070820145843

LOCK FUNCTION: Entry Lock with Passage (Cylindrical or Mortise without deadbolt)

DOOR INFORMATION			
LOCK CONFIGURATION	VALUE	UNIT	RANGE
UNLOCK TIME	2	SECONDS	2 TO 20
BUZZER VOLUME	1	LEVEL	0 TO 3
TAMPER COUNT	4	ATTEMPTS	3 TO 9
TAMPER SHUTDOWN TIME	30	SECONDS	0 TO 90
PASSAGE MODE	DISABLED		ENABLED / DISABLED
PASSAGE MODE OPEN TIME LIMIT	9	HOURS	0 TO 24
ACCESS CODE LENGTH	4	DIGITS	4 TO 8
REMOTE UNLOCK	DISABLED		ENABLED / DISABLED

AUDIT FILTER INFORMATION			
ACCESS	ENABLED		ENABLED / DISABLED
MANAGER	DISABLED		ENABLED / DISABLED
SERVICE	ENABLED		ENABLED / DISABLED
ALL USERS	ENABLED		ENABLED / DISABLED
M-UNIT USER	ENABLED		ENABLED / DISABLED

# Appendix

Lock Configuration Form: Example of an E-Plex 5000 "Entry" Lock



## E-Plex 5000 LOCK CONFIGURATION

Version 3.0

Note: Editable cells are in yellow background

VERIFY DATA

LOCK ID **1001**

LOCK NAME Main Entrance

LOCK FUNCTION Entry Lock with Passage (Cylindrical or Mortise without deadbolt)

DOOR INFORMATION			
LOCK CONFIGURATION	VALUE	UNIT	RANGE
UNLOCK TIME	2	SECONDS	2 TO 20
BUZZER VOLUME	1	LEVEL	0 TO 3
TAMPER COUNT	4	ATTEMPTS	3 TO 9
TAMPER SHUTDOWN TIME	30	SECONDS	0 TO 90
PASSAGE MODE	DISABLED		ENABLED / DISABLED
PASSAGE MODE OPEN TIME LIMIT	9	HOURS	0 TO 24
ACCESS CODE LENGTH	4	DIGITS	4 TO 8
REMOTE UNLOCK	DISABLED		ENABLED / DISABLED

AUDIT FILTER INFORMATION			
ACCESS	ENABLED		ENABLED / DISABLED
MANAGER	DISABLED		ENABLED / DISABLED
SERVICE	ENABLED		ENABLED / DISABLED
ALL USERS	ENABLED		ENABLED / DISABLED
M-UNIT USER	FNARI FD		FNARI FD / DISARIED

## E-Plex 5000 - User Information

USER NUMBER	ACCESS CODE	USER NAME	USER TYPE	USER STATUS	NO. OF HOURS OF ACTIVATION (SERVICE USER)
001	9876	Carla Alexander	MANAGER	ENABLED	
002	6789	Mark Stevens	MANAGER	ENABLED	
003	1234	Michel Morrissette	ACCESS USER	ENABLED	
004	2345	Christin Craig	ACCESS USER	ENABLED	
005	4567	Carlos D'Rosa	ACCESS USER	ENABLED	
006	1122	Sue Schneider	MANAGER	ENABLED	
007	3344	Jim Jamieson	ACCESS USER	ENABLED	
008	6677	Vicky Brown	ACCESS USER	ENABLED	
009				ENABLED	
010	7777	Jawa	SERVICE USER	ENABLED	7
011				ENABLED	
012				ENABLED	

# Appendix (continued)

Lock Configuration Form: Example of an E-Plex 5000 "Privacy" Lock



## E-Plex 5000 LOCK CONFIGURATION

Version 3.0

Note: Editable cells are in yellow background

VERIFY DATA

LOCK ID **1002**

LOCK NAME **Payroll Dept**

LOCK FUNCTION **Privacy Lock (Mortise with deadbolt or Cylindrical with thumbtum)**

DOOR INFORMATION			
LOCK CONFIGURATION	VALUE	UNIT	RANGE
UNLOCK TIME	2	SECONDS	2 TO 20
BUZZER VOLUME	1	LEVEL	0 TO 3
TAMPER COUNT	4	ATTEMPTS	3 TO 9
TAMPER SHUTDOWN TIME	30	SECONDS	0 TO 90
PASSAGE MODE	DISABLED		ENABLED / DISABLED
PASSAGE MODE OPEN TIME LIMIT	9	HOURS	0 TO 24
ACCESS CODE LENGTH	4	DIGITS	4 TO 8
REMOTE UNLOCK	ENABLED		ENABLED / DISABLED

AUDIT FILTER INFORMATION			
ACCESS	ENABLED		ENABLED / DISABLED
MANAGER	ENABLED		ENABLED / DISABLED
SERVICE	ENABLED		ENABLED / DISABLED
ALL USERS	ENABLED		ENABLED / DISABLED
M-UNIT USER	ENABLED		ENABLED / DISABLED

## E-Plex 5000 - User Information

USER NUMBER	ACCESS CODE	USER NAME	USER TYPE	USER STATUS	NO. OF HOURS OF ACTIVATION (SERVICE USER)	OVERRIDE PRIVACY
001				ENABLED		DISABLED
002	6789	Mark Stevens	MANAGER	ENABLED		ENABLED
003	1234	Michel Morrissette	ACCESS USER	ENABLED		DISABLED
004	2345	Christin Craig	ACCESS USER	ENABLED		DISABLED
005				ENABLED		DISABLED
006	1122	Sue Schneider	MANAGER	ENABLED		DISABLED
007				ENABLED		DISABLED
008	6677	Vicky Brown	ACCESS USER	ENABLED		DISABLED
009				ENABLED		DISABLED
010	7777	Jawa	SERVICE USER	ENABLED	7	DISABLED
011				ENABLED		DISABLED
012				ENABLED		DISABLED

# Appendix (continued)

Lock Configuration Form: Example of an E-Plex 3000 Latch “Holdback” Lock



**E-Plex 3000**  
**LOCK CONFIGURATION**

**LOCK**  
 Version 3.0

Note: Editable cells are in yellow background

**LOCK ID** 3001

**LOCK NAME** Cafeteria

**LOCK FUNCTION** Latch Holdback

**VERIFY DATA**

DOOR INFORMATION			
LOCK CONFIGURATION	VALUE	UNIT	RANGE
UNLOCK TIME	2	SECONDS	2 TO 20
BUZZER VOLUME	1	LEVEL	0 TO 3
TAMPER COUNT	4	ATTEMPTS	3 TO 9
TAMPER SHUTDOWN TIME	30	SECONDS	0 TO 90
PASSAGE MODE	ENABLED		ENABLED / DISABLED
PASSAGE MODE OPEN TIME LIMIT	9	HOURS	0 TO 24
ACCESS CODE LENGTH	4	DIGITS	4 TO 8
REMOTE UNLOCK	DISABLED		ENABLED / DISABLED
LATCH HOLDBACK	ENABLED		ENABLED / DISABLED

AUDIT FILTER INFORMATION			
ACCESS	ENABLED		ENABLED / DISABLED
MANAGER	ENABLED		ENABLED / DISABLED
SERVICE	ENABLED		ENABLED / DISABLED
ALL USERS	ENABLED		ENABLED / DISABLED
MINUTE USER	ENABLED		ENABLED / DISABLED

## E-Plex 3000 - User Information

USER NUMBER	ACCESS CODE	USER NAME	USER TYPE	USER STATUS	NO. OF HOURS OF ACTIVATION (SERVICE USER)	PRIVILEGED USER
001	9876	Carla Alexander	MANAGER	ENABLED		ENABLED
002				ENABLED		DISABLED
003	1234	Michel Morrissette	ACCESS USER	ENABLED		DISABLED
004				ENABLED		DISABLED
005				ENABLED		DISABLED
006	1122	Sue Schneider	MANAGER	ENABLED		DISABLED
007				ENABLED		DISABLED
008	6677	Vicky Brown	ACCESS USER	ENABLED		DISABLED
009				ENABLED		DISABLED
010	7777	Jawa	SERVICE USER	ENABLED	10	DISABLED
011				ENABLED		DISABLED
012				ENABLED		DISABLED

Lock Configuration Form: Example of an E-Plex 3000 "Swingbolt" Lock



**E-Plex 3000 LOCK CONFIGURATION** Version 3.0

Note: Editable cells are in yellow background

**VERIFY DATA**

LOCK ID: **3002** LOCK NAME: **Tool Room**

LOCK FUNCTION: **Swing bolt**

DOOR INFORMATION			
LOCK CONFIGURATION	VALUE	UNIT	RANGE
UNLOCK TIME	2	SECONDS	2 TO 20
BUZZER VOLUME	1	LEVEL	0 TO 3
TAMPER COUNT	4	ATTEMPTS	3 TO 9
TAMPER SHUTDOWN TIME	30	SECONDS	0 TO 90
PASSAGE MODE	DISABLED		ENABLED / DISABLED
PASSAGE MODE OPEN TIME LIMIT	9	HOURS	0 TO 24
ACCESS CODE LENGTH	4	DIGITS	4 TO 8
REMOTE UNLOCK	DISABLED		ENABLED / DISABLED
LATCH HOLDBACK	DISABLED		ENABLED / DISABLED

AUDIT FILTER INFORMATION			
ACCESS	ENABLED		ENABLED / DISABLED
MANAGER	ENABLED		ENABLED / DISABLED
SERVICE	ENABLED		ENABLED / DISABLED
ALL USERS	ENABLED		ENABLED / DISABLED
M-UNIT USER	ENABLED		ENABLED / DISABLED

**E-Plex 3000 - User Information**



USER NUMBER	ACCESS CODE	USER NAME	USER TYPE	USER STATUS	NO. OF HOURS OF ACTIVATION (SERVICE USER)	PRIVILEGED USER
001				ENABLED		DISABLED
002	6789	Mark Stevens	MANAGER	ENABLED		ENABLED
003	1234	Michel Morrissette	ACCESS USER	ENABLED		DISABLED
004				ENABLED		DISABLED
005				ENABLED		DISABLED
006				ENABLED		DISABLED
007	3344	Jim Jamieson	ACCESS USER	ENABLED		DISABLED
008				ENABLED		DISABLED
009				ENABLED		DISABLED
010	7777	Jawa	SERVICE USER	ENABLED	8	DISABLED
011				ENABLED		DISABLED
012				ENABLED		DISABLED

**Audit Filter Information**

Categories – Access, Manager, Service etc. ENABLED means that any activity related to these categories will be logged in the Audit, without your having to select each sub-category individually. For example, for Access, the following will be logged if you select ENABLED.

- Add access code
- Enable access code
- Disable access code
- Delete access code

**E-Plex Standard Tree Structure**

The Data tree structure in E-Plex Standard opens one level each time you click on the + sign beside a name or click on a folder to open it.

The top-level structure appears with the main folder (E-Plex Standard) at the highest level as follows. The contents of the main folder are visible at the right.

1. Click on the plus sign to enlarge the tree to show the next level down in the hierarchy.

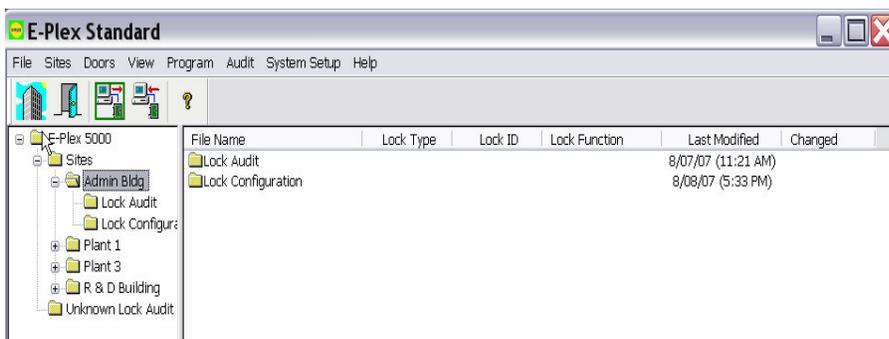
The two folders contained in E-Plex Standard appear both below and at the right:



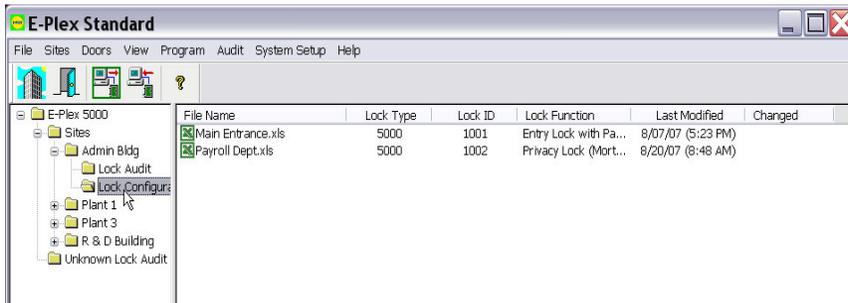
Click on the plus sign to enlarge the tree to show the next level down in the hierarchy. The four different Sites (Admin. Bldg., Plant 1, R&D Building, and Plant 3) appear under Sites but not on the right.



2. Click on one of the sites, Admin. Bldg. for example. The two types of folders for that site appear underneath, but the right-hand panel is unchanged.



3. Now, double click on the Lock Configuration File under Admin. Bldg.



The Lock Configuration Files appear on the right (or you could choose Lock Audit to view the Audit Files).

4. Finally, if you click on a specific Lock File, Main-Entrance.xls., for example, the File opens automatically in Microsoft Excel.



### E-Plex 5000 LOCK CONFIGURATION

Version 3.0

Note: Editable cells are in yellow background VERIFY DATA

**LOCK ID** 1001 **LOCK NAME** Main Entrance +

**LOCK FUNCTION** Entry Lock with Passage (Cylindrical or Mortise without deadbolt)

DOOR INFORMATION			
LOCK CONFIGURATION	VALUE	UNIT	RANGE
UNLOCK TIME	2	SECONDS	2 TO 20
BUZZER VOLUME	1	LEVEL	0 TO 3
TAMPER COUNT	4	ATTEMPTS	3 TO 9
TAMPER SHUTDOWN TIME	30	SECONDS	0 TO 90
PASSAGE MODE	DISABLED		ENABLED / DISABLED
PASSAGE MODE OPEN TIME LIMIT	9	HOURS	0 TO 24
ACCESS CODE LENGTH	4	DIGITS	4 TO 8
REMOTE UNLOCK	DISABLED		ENABLED / DISABLED

AUDIT FILTER INFORMATION			
ACCESS	ENABLED		ENABLED / DISABLED
MANAGER	DISABLED		ENABLED / DISABLED
SERVICE	ENABLED		ENABLED / DISABLED
ALL USERS	ENABLED		ENABLED / DISABLED
LIMIT USER	ENABLED		ENABLED / DISABLED

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## Glossary

### **Audit**

An audit retrieves data recorded in the lock memory regarding activities that have taken place at the lock using the PC M-Unit. The lock records the last 9,000 events.

### **Audit Filter**

The audit memory records basically every activity at the lock. The audit of some lock functions can be filtered out of your audit report if desired by disabling that function in the lock software configuration Excel template on the PC.

### **Buzzer Volume**

The lock has a buzzer to give audio feedback when buttons are pressed and commands are entered. The volume can be adjusted to one of four levels – no sound, low, medium, and high.

### **Communication Mode**

Lock programming, auditing and/or downloading door profile is done via Infrared (IrDA) Communication without the use of cables between the lock and PC M-Unit. You will need to put the lock into Communication Mode before Communicating with the PC M-Unit. This is done by entering the command #900 on the lock's pushbuttons. Green and red LEDs will flash alternatively to start the communication with the PC M-Unit.

### **Download Door Profile**

Similar to retrieving audits, this function using the PC M-Unit downloads the lock's current configuration data residing in the lock memory which might have changed by the Master or Mangers in manually deleting and/or adding user codes at the lock pushbuttons. The downloaded door profile can then be hotsync'd back to the PC to synchronize and update the Lock Configuration Excel data template for the same lock to ensure that both lock and PC lock configuration data contain exactly the same user PINs.

### **Disable**

To de-activate a user or function.

### **Enable**

To activate a user or function

### **Excel Macro Level**

Microsoft Excel gives users the option of setting their software parameters to optimize efficiency. The E-Plex software has predefined some macro functions that need to be enabled in Excel to get full functionality of the software.

### **Latch Holdback Mode (E-Plex 3000 only)**

Similar to the traditional passage mode function, but the latch stays retracted physically even after the door closes. In this mode, people carrying packages etc. do not have to grab the lever to open the door but they can simply push the door to gain entry.

### **Lock Configuration Template**

Every time you add a lock in a site in the E-Plex Standard software, the pre-defined Excel template file is automatically generated by the system. You will enter all lock and user related information in the "Lock Config" Template. (See the Appendix section for an example.)

### **Lock Functions**

Before programming or auditing any lock, it must be manually setup at the pushbuttons while still in factory mode to conform to one of four lock functions for E-Plex 2000/5000 namely, Entry lock, Storeroom lock, Residence lock or Privacy lock and one of three lock functions for E-Plex 3000 namely Latch Holdback, Swing bolt and Exit – see section "Lock Functions" on page 12 for details. The lock comes from the factory with the lock function preset as an "Entry Lock" by default for E-Plex 2000/5000 and as a "Latch Holdback" for E-Plex 3000 by default. Also, every time a hardware reset is performed on the lock, the lock function reverts back to the factory default lock function "Entry for E-Plex 2000/5000 and "Latch Holdback" for E-Plex 3000.

### **Lockout**

Access is only granted to the Master user. All other users with valid access cods are locked out when the lock is put in the lockout mode.

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### **PC M-Unit (PC Maintenance Unit)**

A PC M-Unit is the Kaba programming tool for E-Plex locks that transfers the data from the host PC to the locks. It can be either a PC Laptop or Netbook using an USB->IrDA adaptor to communicate with the locks combined with the host PC running the main E-Plex Standard software to program or audit the locks. The USB->IrDA adaptor is supplied with Kaba's PC M-Unit (IrDA) Communication's accessory kit which is also included with the Standard Software Implementation Kit.

### **M-Unit User**

For every lock, there is one and only one M-Unit (and also one Master) User. This M-Unit User can only program, audit or download locks with the PC M-Unit, but the M-Unit user code will not open the lock. This feature is especially useful for large sites with multiple doors scattered over a wide area, as it eliminates the Master or Manger(s) from physically traveling to all of the locks for programming or auditing functions. Instead, the M-Unit User can do all of this, but will not have access to the locks/doors.

### **Master User**

Every lock by default will have one Master User Code, which can be modified, but not deleted. This is always an 8-digit code, and it allows the Master User complete control of programming and/or auditing locks. The default factory Master code is 12345678 which MUST be changed to do any programming of the lock.

### **Manager User**

A Manager User has more authority than an access user and is authorized to perform most of the functions of the Master Users at the lock pushbuttons, except a few, which are outlined in the E-Plex 2000/3000/5000 Operations manual. E2000 series locks can be programmed to have from 1 to 99 unique Manager user codes; E3000/5000 locks can support from 1 to 299 unique Manager user codes.

### **Passage Mode**

The lock is in an "open" or unlocked position which means the latchbolt can be retracted by the outside lever without entering a valid access code.

### **Privacy Mode (E-Plex 2000/5000 locks only)**

When a lock is in privacy lock function mode, the user can project either a physical deadbolt or a "virtual" deadbolt from the interior side of the door by flipping the privacy thumbturn on the lock. In this mode, only the Master, Manager(s) or privileged users can override privacy with their PIN which will disengage the privacy.

### **Service User**

A Service User can be granted one time access only or for a designated period from 1 to 24 hours. E2000 series locks can be programmed to have from 1 to 99 unique Service user codes; E3000/5000 locks can support from 1 to 299 unique Service user codes.

### **Site**

A Site is an area/section/building etc., where your E-Plex 2000/3000/5000 locks are installed. For example, you can create a site called "Administration Building," another called "Downtown Campus," etc., and then assign a group of locks for each site in the software. This makes managing the overall security more organized for the security personnel managing the property.

### **Swingbolt Mode (E-Plex 3000 only)**

In this mode, when the physical swingbolt is projected any valid user PIN can retract and disengage the swingbolt to gain entry. However, when the swingbolt retracts, it stays fully retracted and the lock behaves as though it is in a "Latch Holdback" mode with free passage.

### **Tamper Count**

How many failed attempts can be entered at the lock before the lock goes into Tamper Shutdown.

### **Tamper Shutdown**

The time that a lock remains in an inoperative state following the specified number of failed access attempts.

### **Unlock Time**

The amount of time in seconds the lock remains in an "open" position after a valid access code is entered before re-locking again.

---

**User Number**

User Number refers to the table reference where a specific user's name and access information are stored. On E2000 series locks, the table reference range is 001 to 099 unique user codes; in E3000/5000 locks, the range is from 001 to 299 unique user codes.

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