



MTI Managed Access Gen 3 Guide

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GETTING STARTED

User Access Guidelines

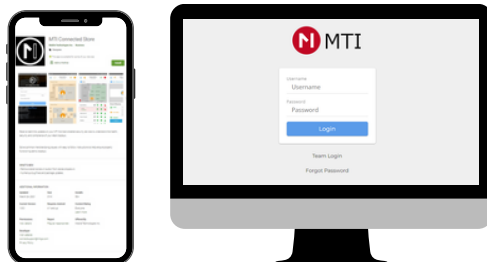
User Access by Role

Access	Associate	Manager	Org Admin
Create Regions			•
Create Stores			•
Create Fixtures		•	•
Create Positions		•	•
Create Users		•	•
Create Keycards		•	•
Create Hours of Operations		•	•
Assign Positions		•	•
Assign Keycards		•	•
Store Layout Maintenance		•	•
Security Assignments		•	•
Edit Hours of Operations		•	•
View Entire Org			•
View Entire Org Logs			•
View Region			•
View Region Logs			•
View Store(s)		•	•
View Store(s) Logs		•	•
View Store Layout	•	•	•
View Exception Report (Home Page Only)	•	•	•

User interfaces

✓ Mobile App

✓ Web Portal

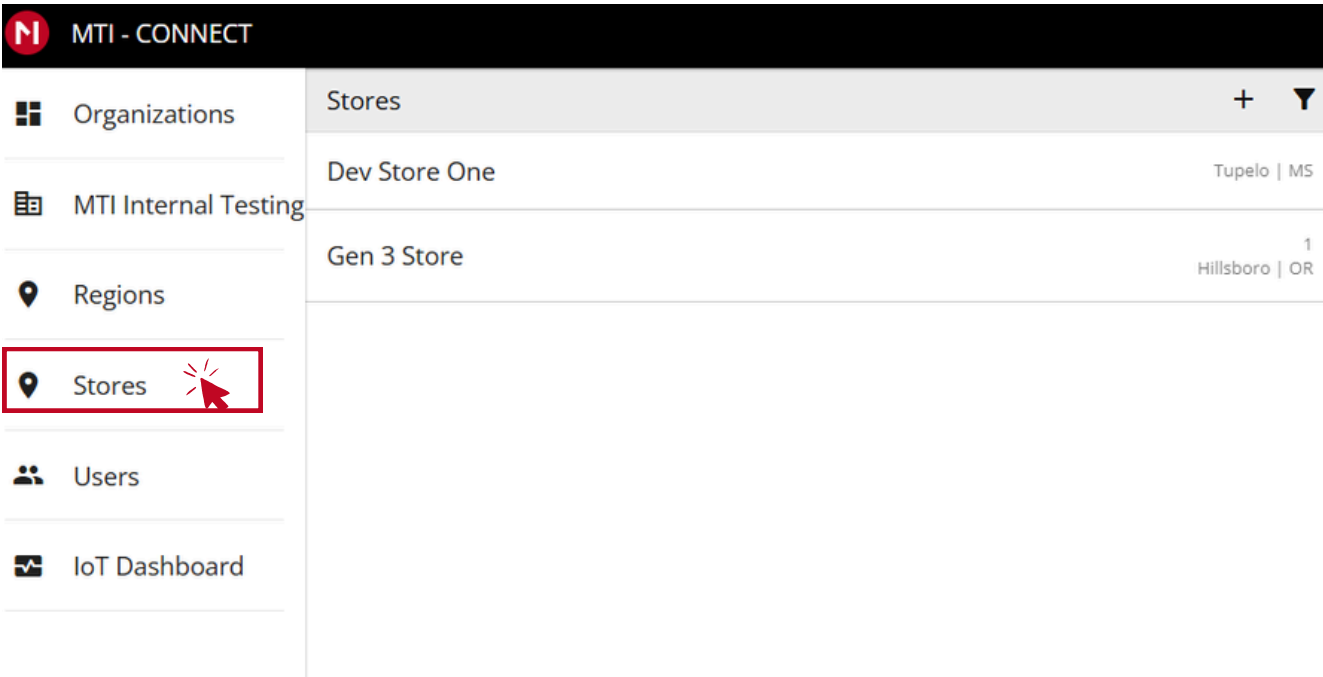




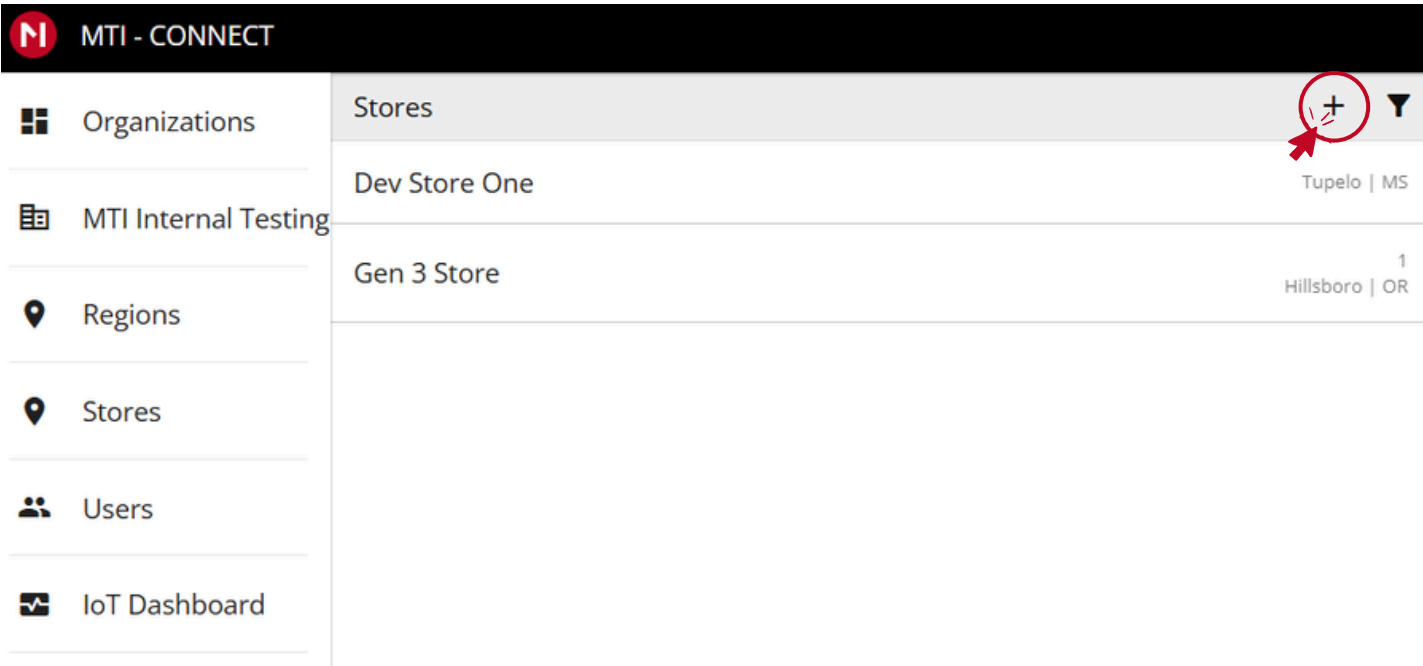
NEW STORE CREATION



- 1. Log in to the Web Portal
- 2. Select stores from the sidebar menu



- 3. Click on the “+” icon to create a new store



4. A new window will pop up. Fill out all required (*) information and click Save

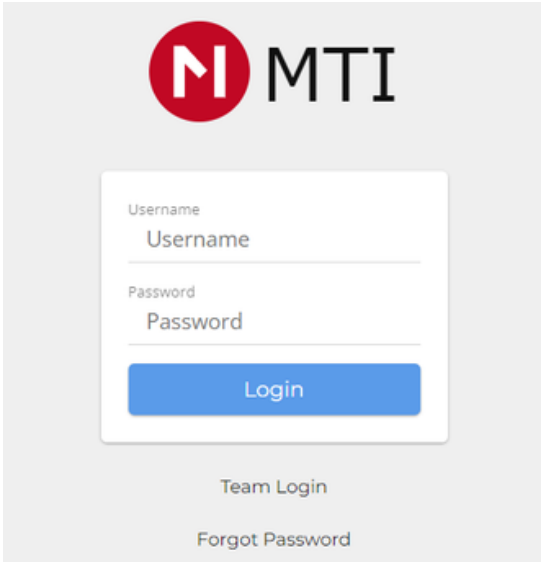
The screenshot shows the MTI - CONNECT web application. On the left is a sidebar with navigation links: Organizations, MTI Gen 3 Web Portal, Regions, Stores, Users, IoT Dashboard, Alonso Serna, and Logout. The main content area is titled 'Stores' and contains a sub-section 'Gen 3 Managed Access'. A modal window is open in the center, titled 'GENERAL'. It contains the following fields: 'Store Name *' (required), 'Branch Code', 'Time Zone *' (required), 'Region', 'Contact Name *' (required), 'Contact Email *' (required), 'Contact Phone', and a 'KEYS' section at the bottom.

The screenshot shows the same MTI - CONNECT interface, but the modal window is titled 'VERSAs'. It contains a checkbox for 'BLE' and an 'ADDRESS' section with the following fields: 'Address 1 *' (required), 'Address 2', 'Address 3', 'City *' (required), 'State', 'Postal Code *' (required), and 'Country *' (required). At the bottom of the modal are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red rectangle and a red arrow pointing to it.

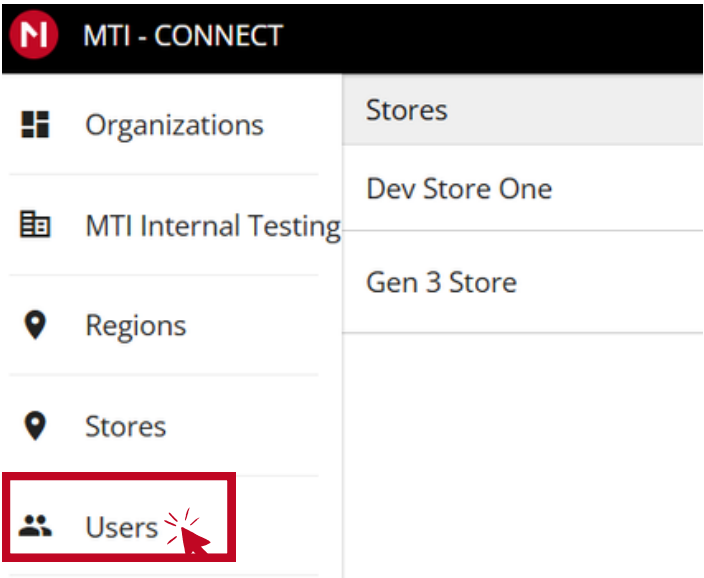


USER MANAGEMENT

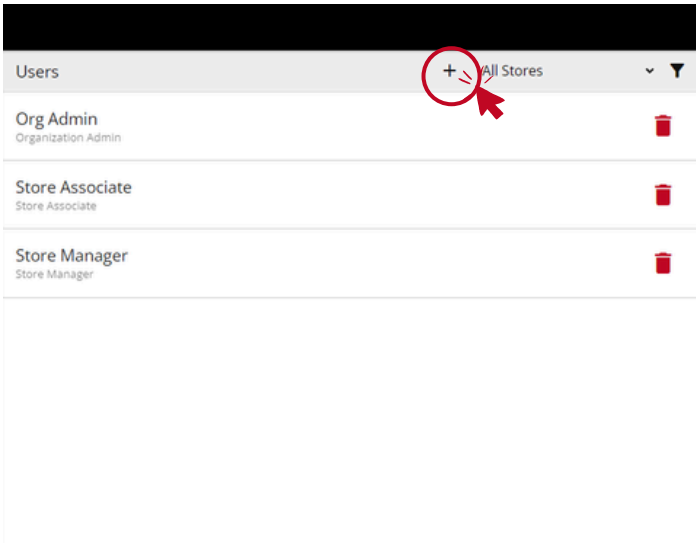
1 Log in to the web portal.



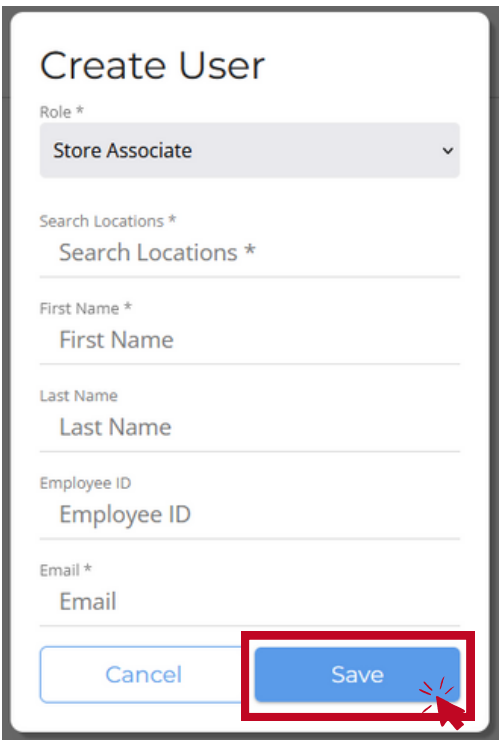
2 Click Users in the nav bar to open the user management screen.



3 Click on the plus icon + to create a new user

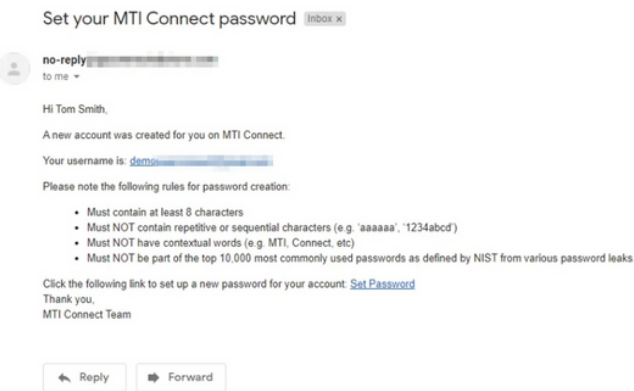


4 In the Create User dialog box, enter the new user's required (*) information and click Save.

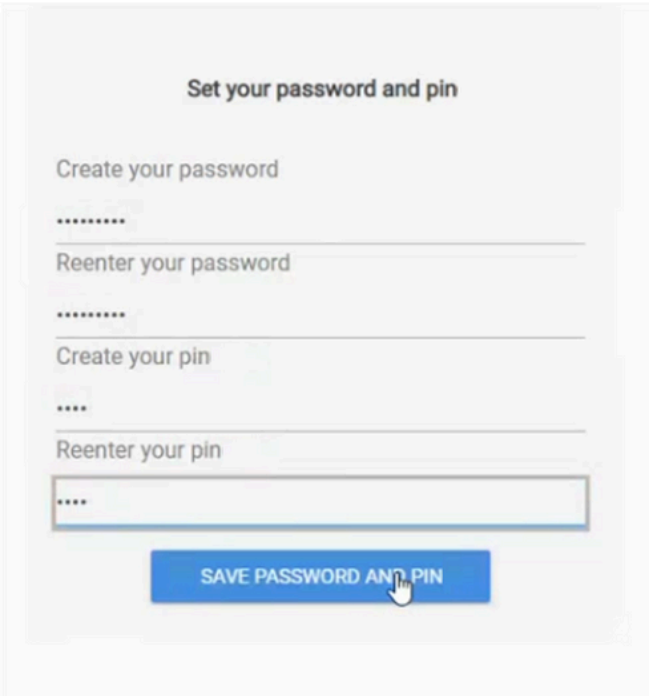


1 New users will receive a welcome email to complete their setup.

By default the users email address will be their username.



2 Upon clicking the [Set Password](#) link; set your password and pin.



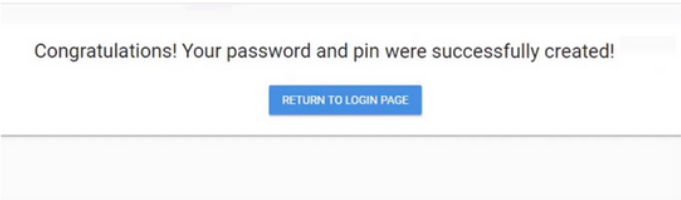
3 Adhere to the necessary password and pin requirements.

Your MTI Connect® password:

- Must contain at least 8 characters
- Must NOT contain repetitive or sequential characters (e.g. 'aaaaaa', '1234abcd')
- Must NOT have contextual words (e.g. MTI, Connect, etc.)
- Must NOT be part of the top 10,000 most commonly used passwords as defined by NIST from various password leaks.

Your MTI Connect® PIN is a 4 4-digit number and should be something that you will easily remember but will be hard for someone to guess. (1111 is NOT a secure PIN).

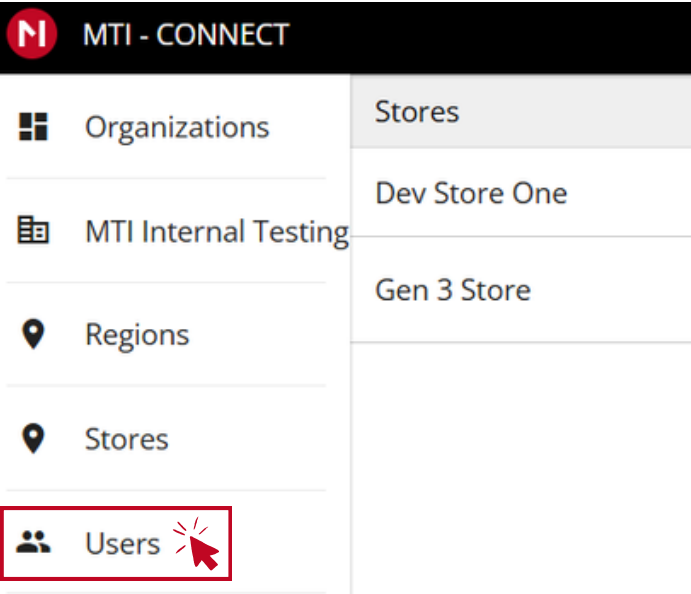
4 If successful, you will see a confirmation message.



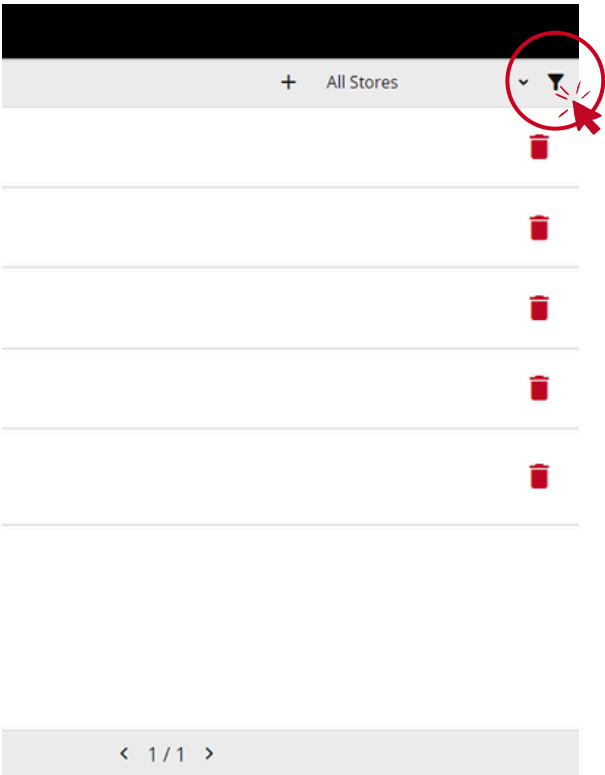
If unsuccessful, please verify that your password and pin meet the requirements.

DEACTIVATING USERS

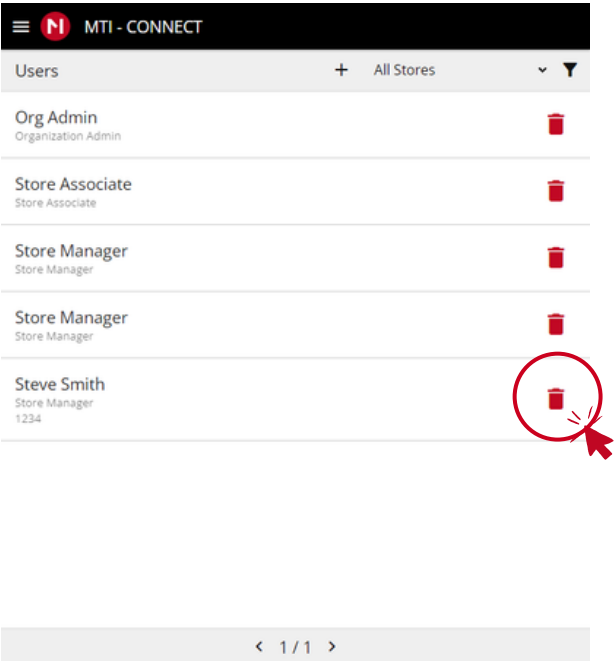
1 Log into the web portal and Click Users in the nav bar to open the user management screen.



2 On the Users page, you can scroll through the list of users and/or use the filter icon to search for individual users.

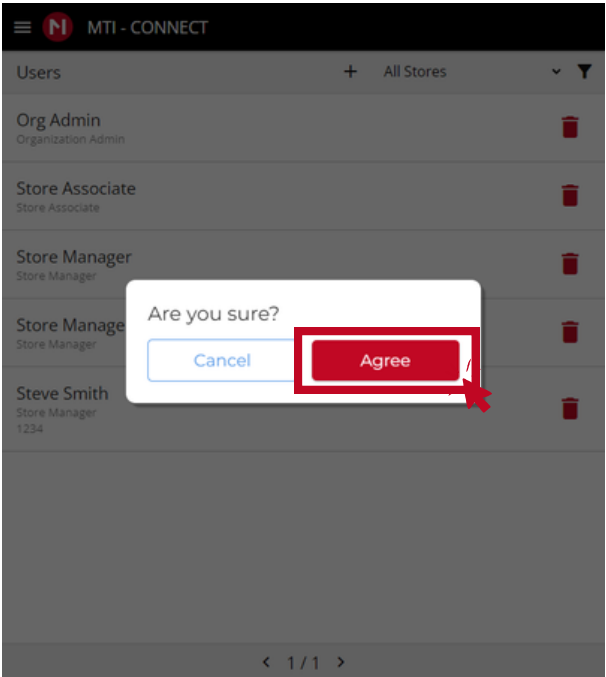


3 Click on the red trash can icon on the right hand side of the user you wish to deactivate.



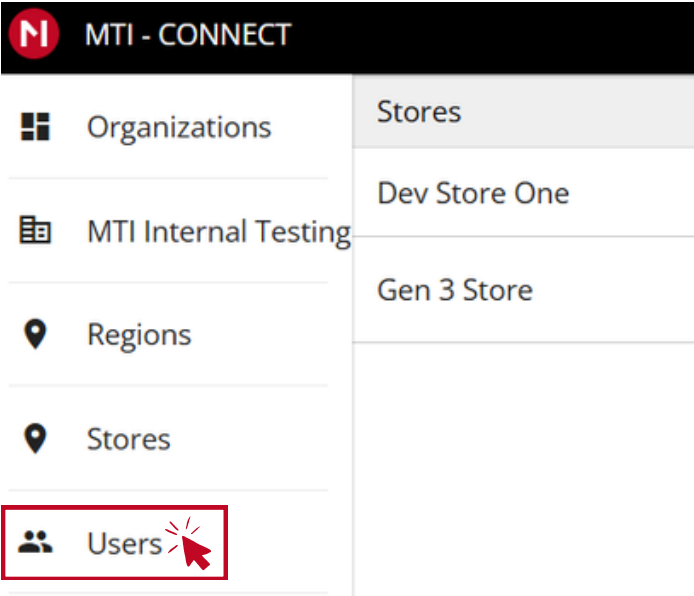
4 A new window will popup asking for confirmation. Click agree to complete the action.

Note: Deactivating a user does not delete their historical activity.

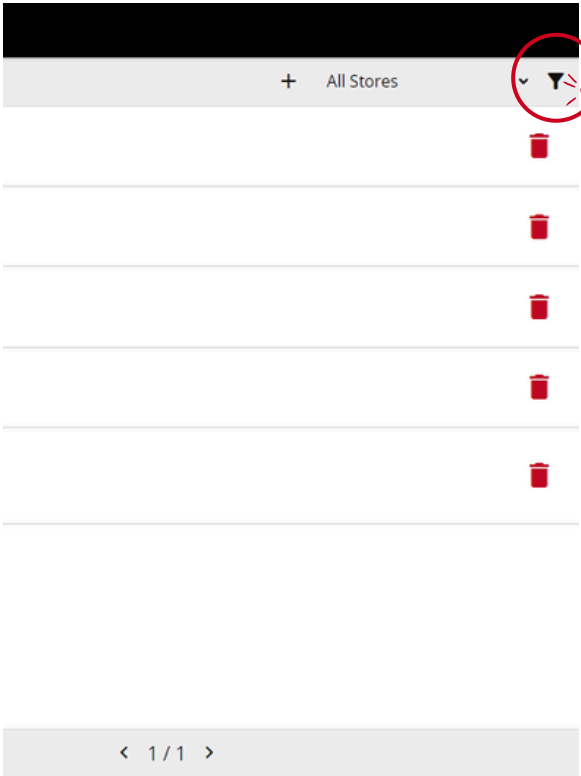


REACTIVATING USERS

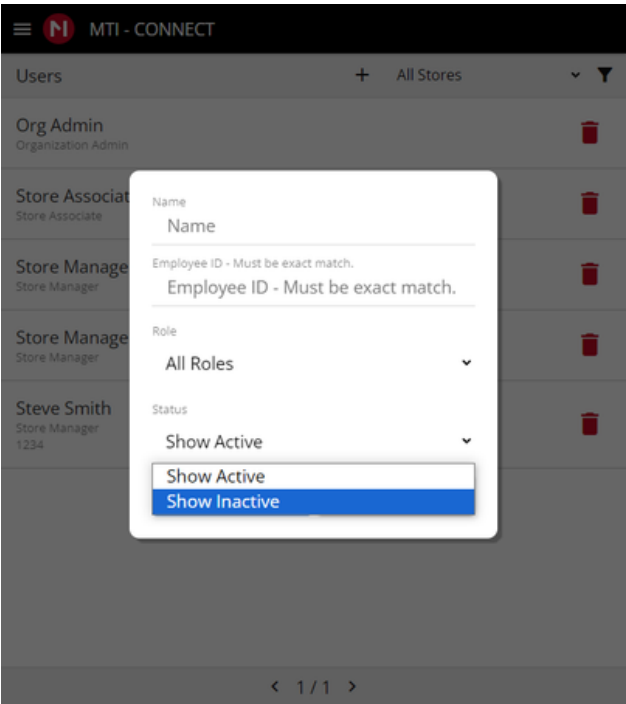
1 Log into the web portal and Click Users in the nav bar to open the user management screen.



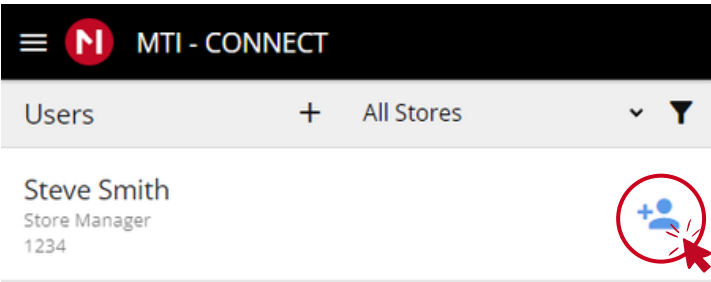
2 On the users page click on the filter icon. A pop-up window will appear.



3 Enter the name of the individual you want to reactivate.



4 After you have found the account you wish to reactivate click on the blue icon.





KEY MANAGEMENT

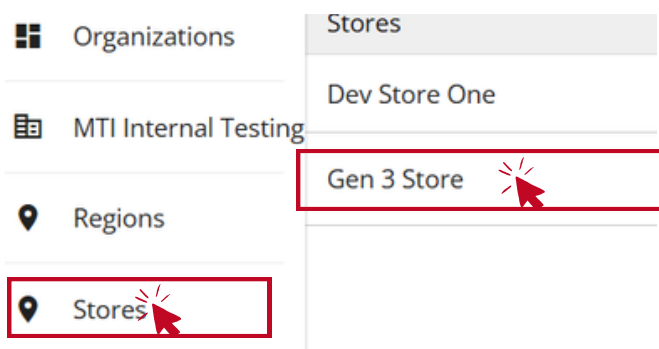
ADDING KEYS

- 1 Before starting, locate the serial number on the back of the Versa Key™ (card or fob) you wish to add.

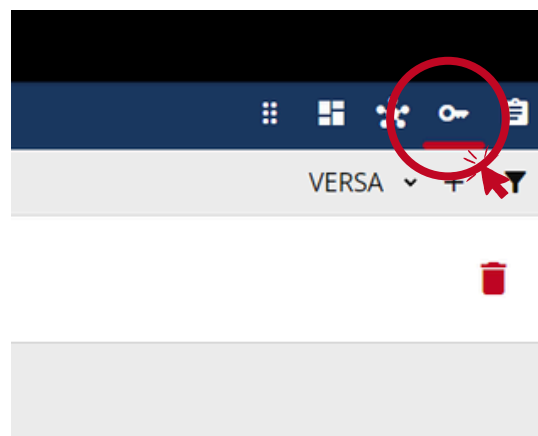


- 2 Log into the web portal and Click Stores in the nav bar to open the Stores Page.

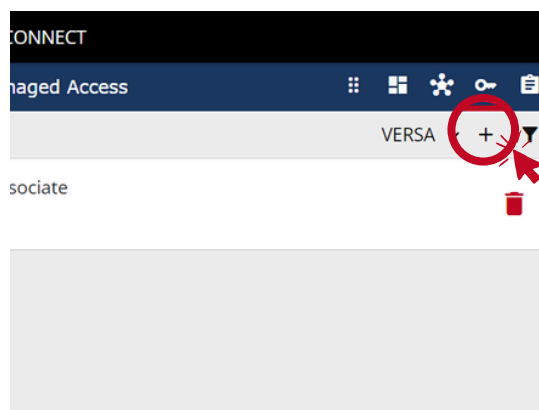
Select the store you wish to add the key to.



- 3 Next on the top banner on the right side of the page, click on the KEY icon to access the keys page.



- 4 On the keys page click on the “+” icon to add a new Versa Key™.



- 5 Create VERSA Key popup will appear. Type in the serial number of the key and click Save.

Create VERSA Key

☐ Backup Key

Key Serial

1234567A

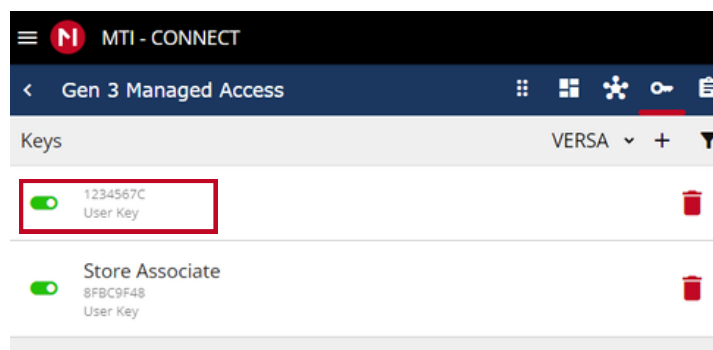
Assigned User

Assigned User

Cancel

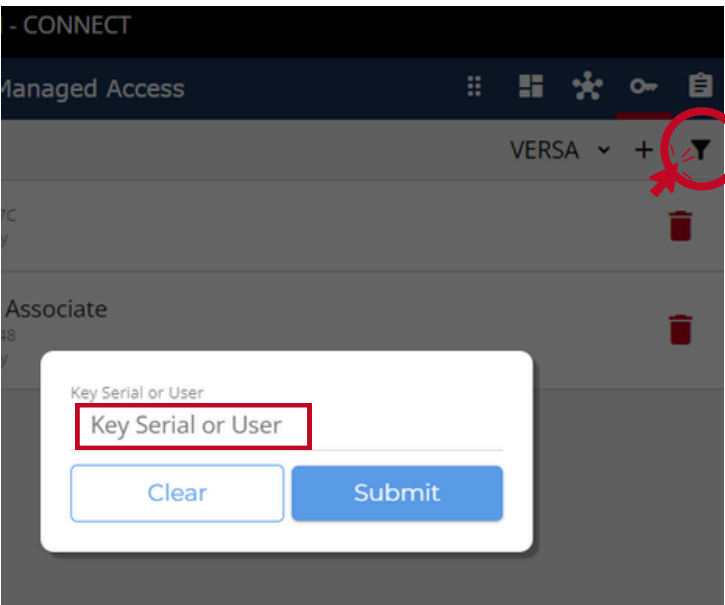
Save

- 6 The key will now be added to the list in the Keys page.

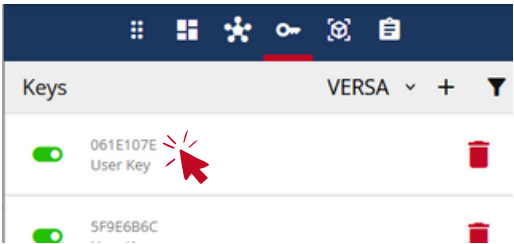


ASSIGNING KEYS

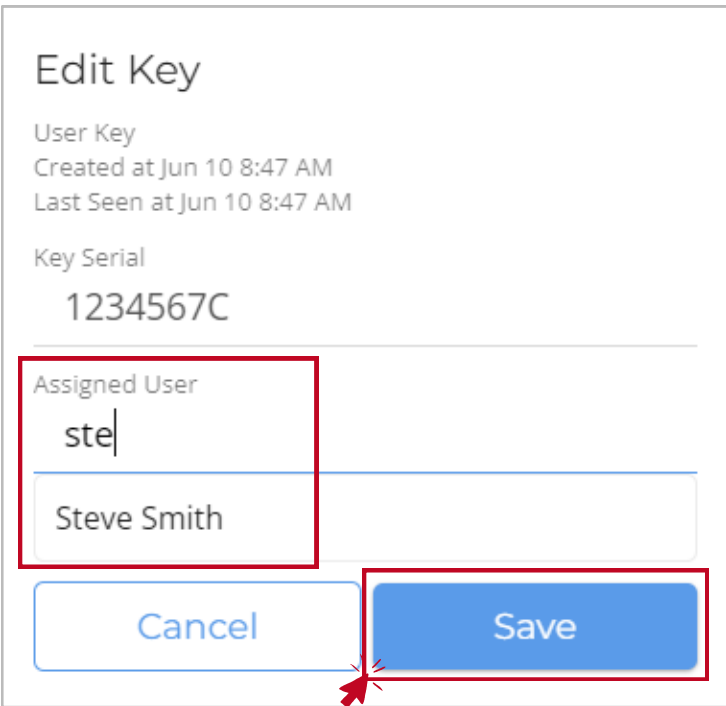
- 1 In the Keys page search for the key you wish to assign by using the filter tool and the keys serial number.



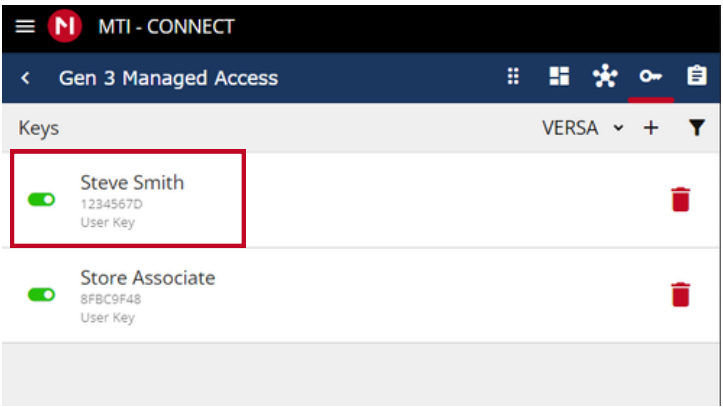
- 2 Once the key is found, click on the key, an Edit Key pop-up will appear.



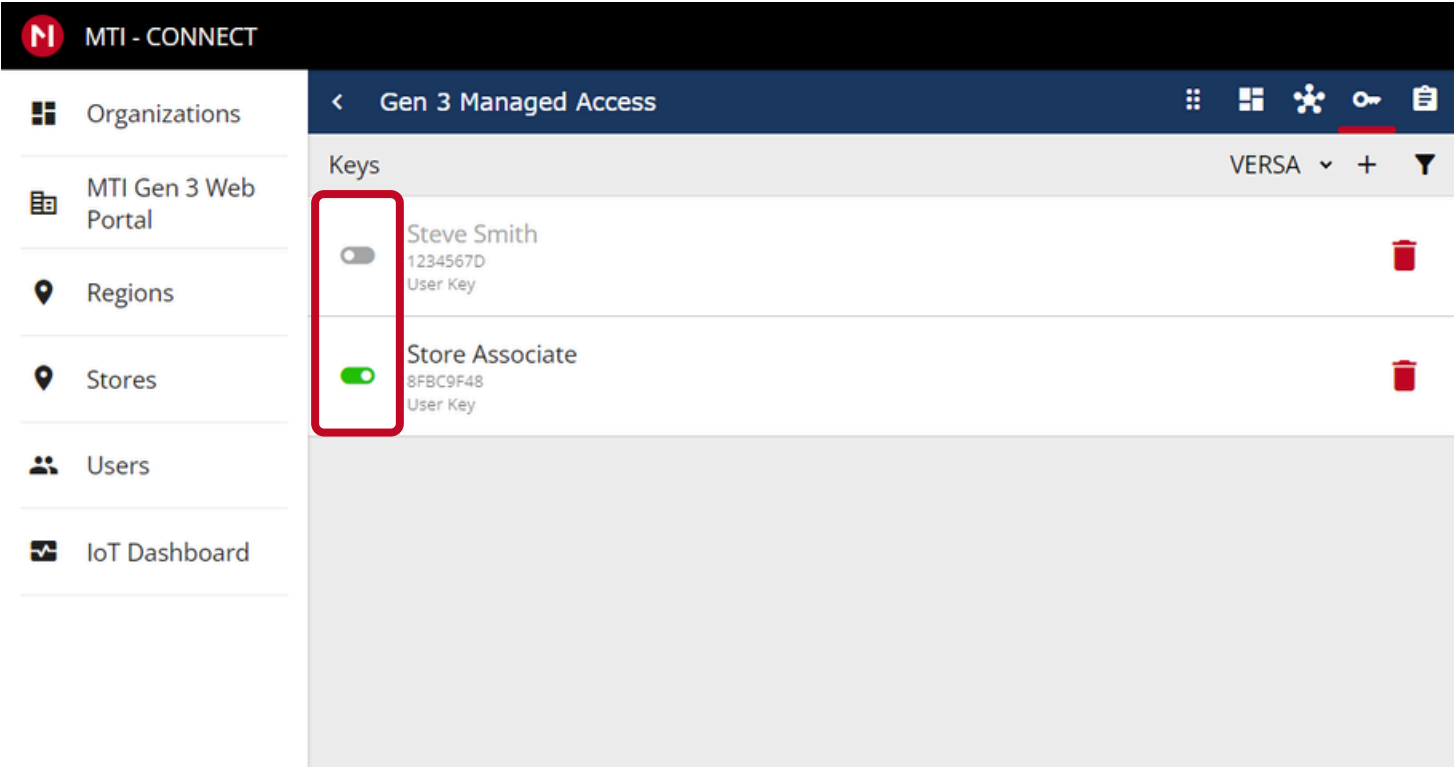
- 3 In the Edit Key pop-up, select the user you wish to assign the key to and click Save.



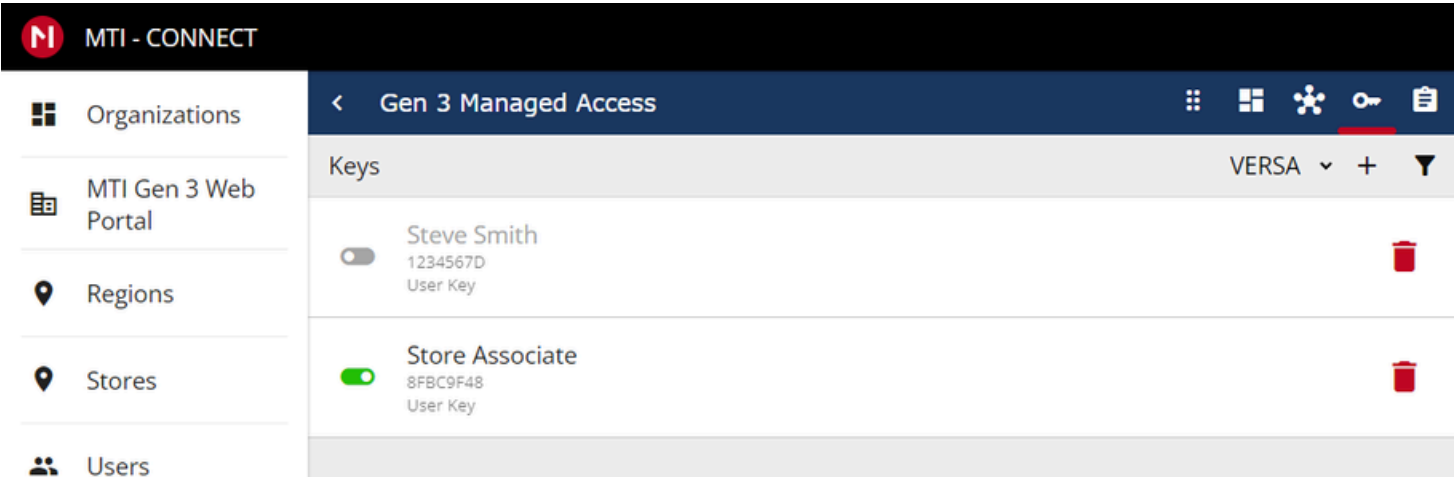
- 4 After saving the key will now be assigned to the user.



- 1 To manually set a key from active to inactive, navigate to the Keys page and you will see a list of keys and their current status, indicated by the green or grey toggle icon.



- 2 Click on the slider icon to change the keys status from active to inactive. The green slider indicates an activate (on) key and the grey slider indicates an inactive (off) key.



Inactive



Active

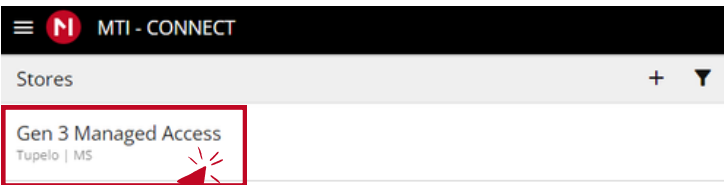




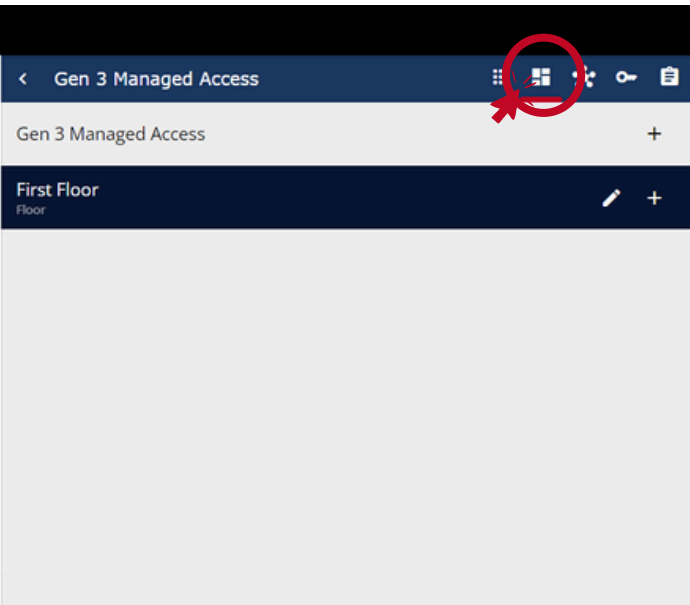
FIXTURE MANAGEMENT

ADDING A FIXTURE

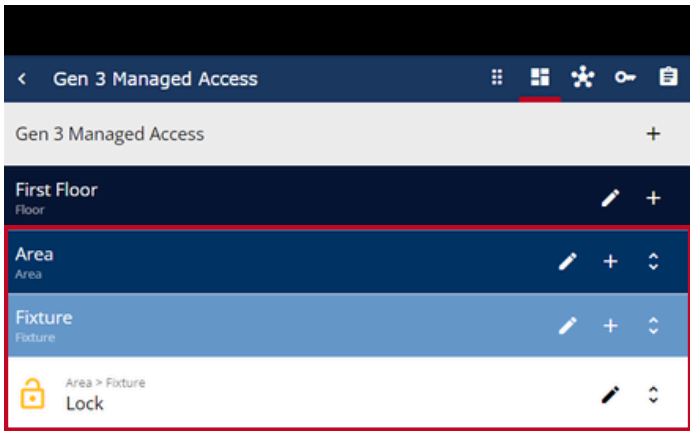
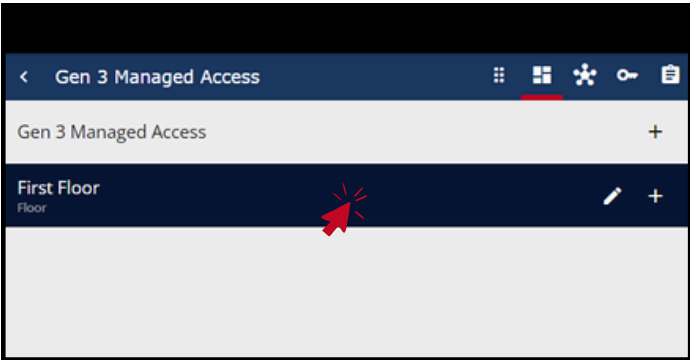
1 Begin by clicking on the store name.



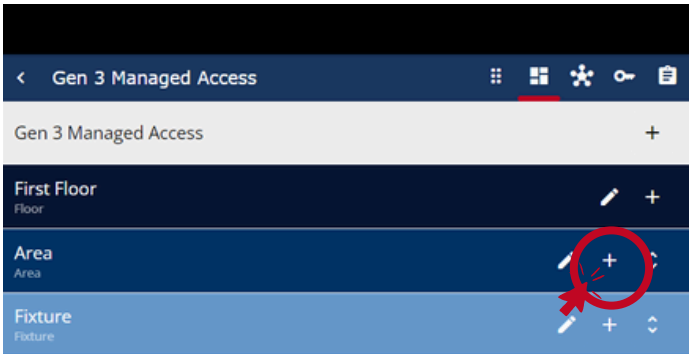
2 Click on the Store Layout icon to access the page where you can add more fixtures.



3 To expand the layers of your store; click in the middle of the floor row and it will expand into the interior layers.



4 To create a new fixture click on the “+” icon of the Area you wish to add the fixture to.



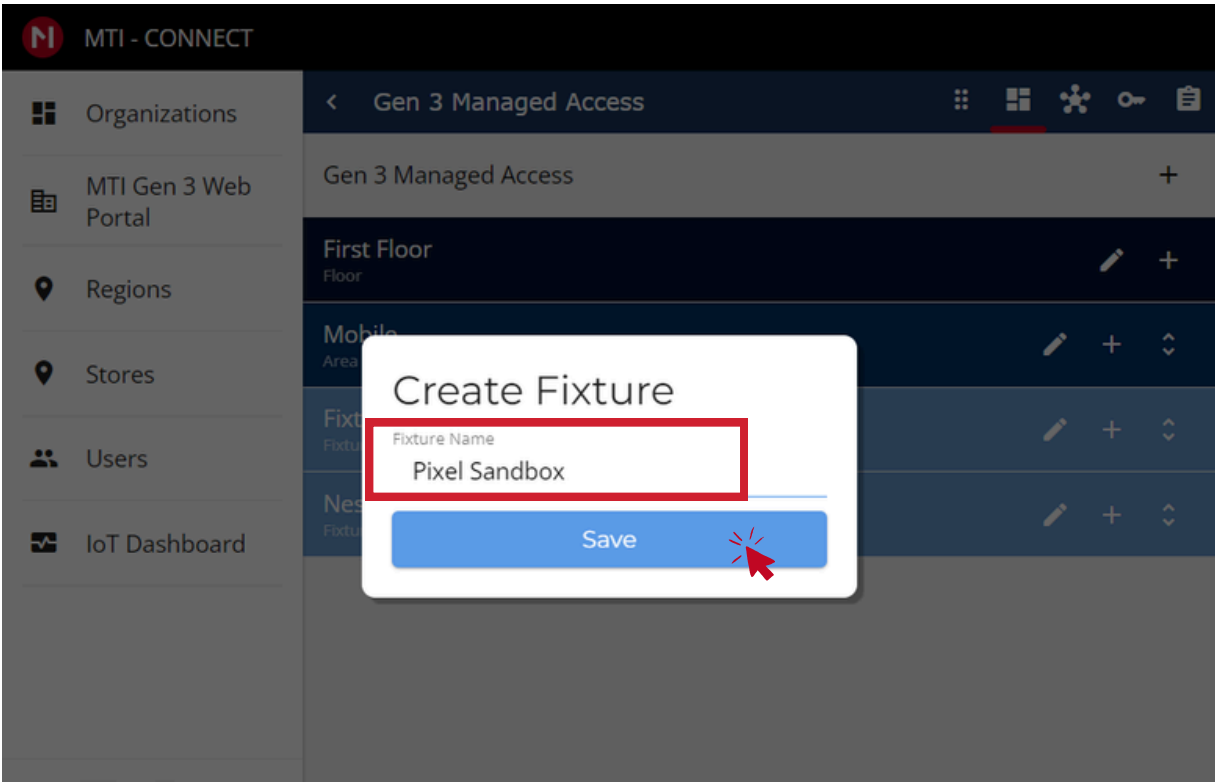
Create Fixture

Fixture Name

Fixture Name

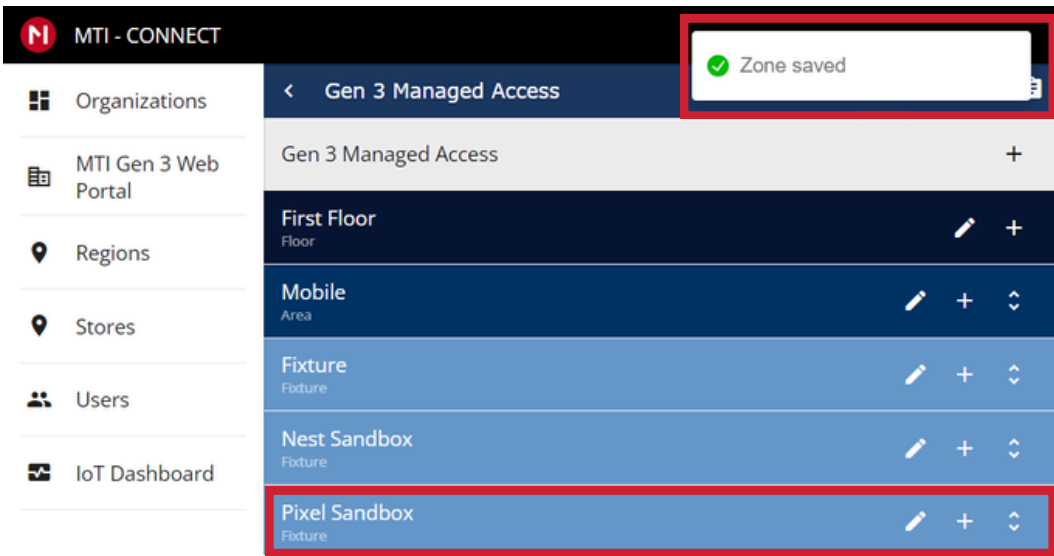
Save

1 On the Create Fixture pop-up, name your new fixture and click Save.



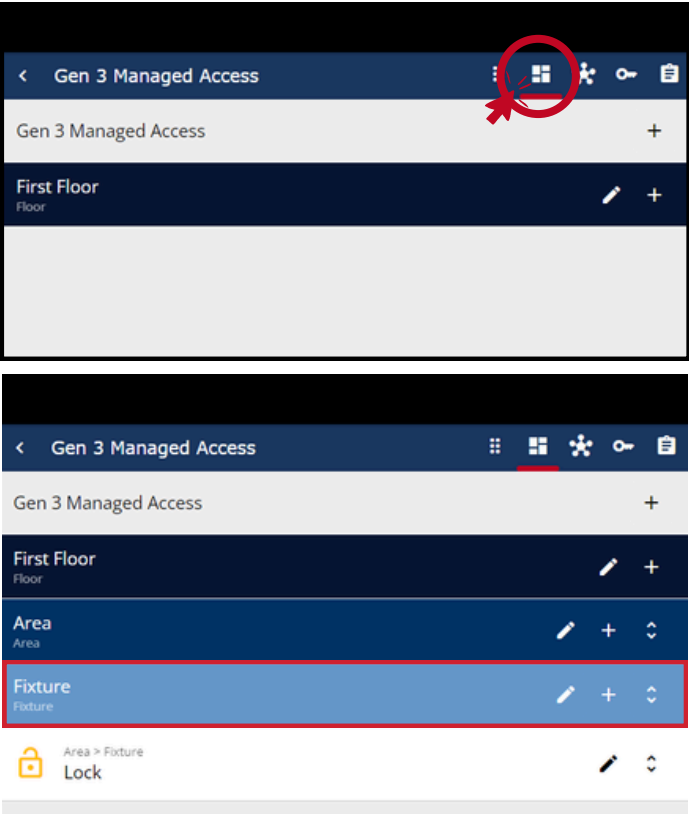
2 After clicking Save on the top right a notification will appear and your new fixture will appear below the Area you added it to.

Note: The confirmation will state "Zone" in this step that means Fixture.



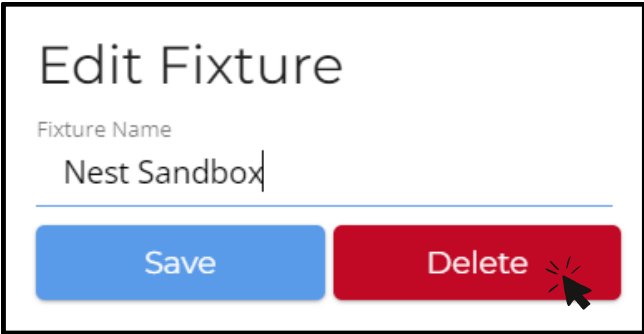
DELETING A FIXTURE

- 1
- Navigate to the store layout page and expand the rows to the fixture you wish to delete.

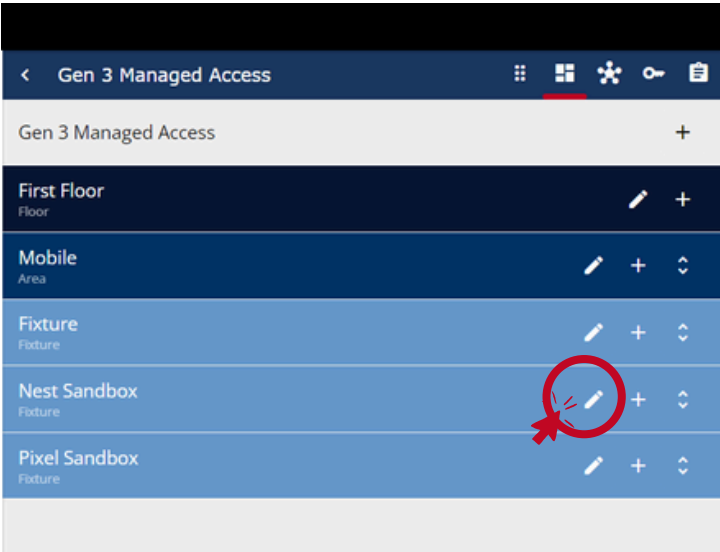


- 3
- On the Edit Fixture pop-up you can click on the delete button to remove the fixture.

Note: Deleting a fixture does not delete historical activity.



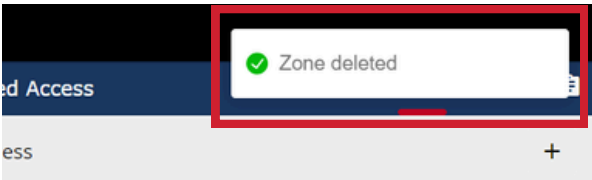
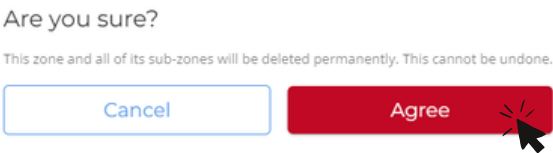
- 2
- Select the fixture you want to remove by clicking on the pencil icon.



- 4
- Once you confirm the deletion of a fixture, any related items such as the positions within the fixture will also be removed.

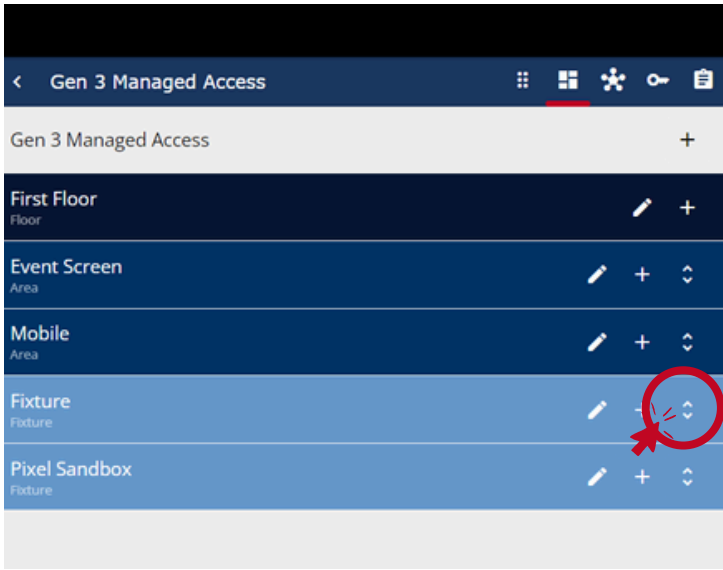
If you are **certain**, click Agree to proceed with deleting the fixture. A notification saying "Zone Deleted" will then appear on the top right.

Note: The confirmation will state "Zone" in this step that means Fixture.

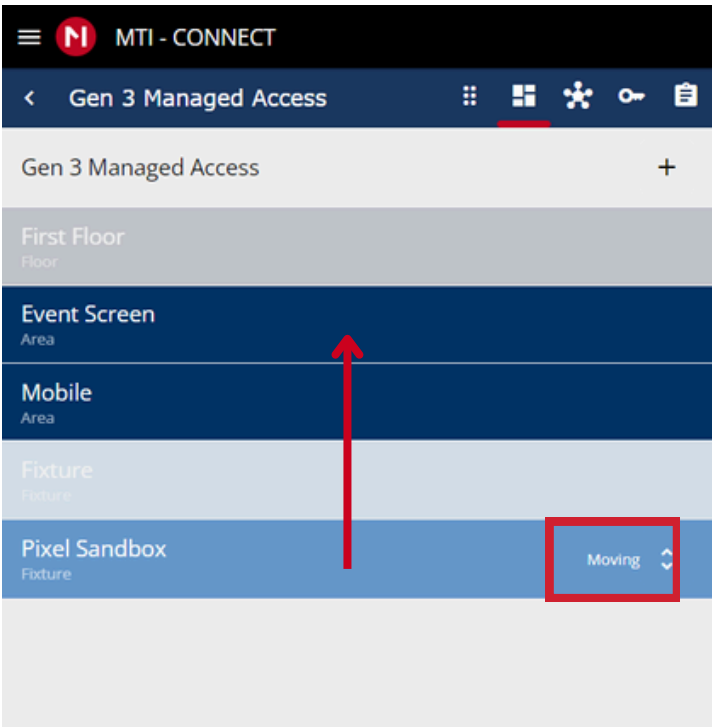


ADJUSTING A FIXTURE

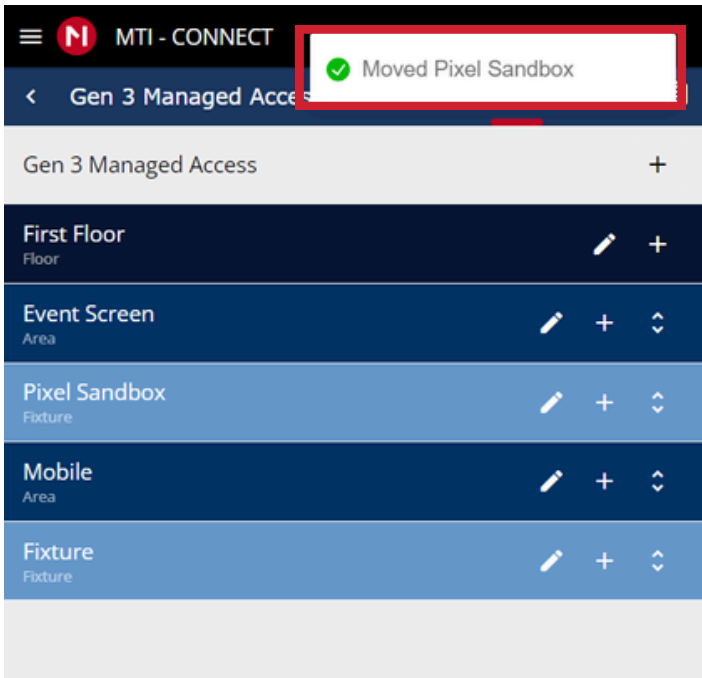
1 To relocate a fixture, click on the arrows icon located at the far right of the fixture.



2 After clicking on the arrows icon, the fixture row will state "moving", now you may drag and drop the fixture to a new area.

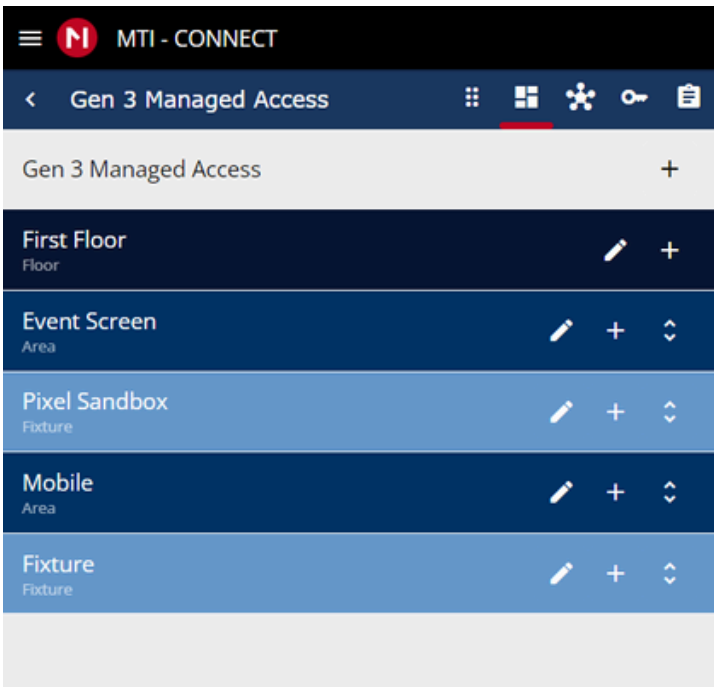


3 After selecting the new area for your fixture a pop-up will appear on the top right confirming your move.



4 Fixtures can be moved to any area.

Note: All the positions within the fixture, move with the fixture.





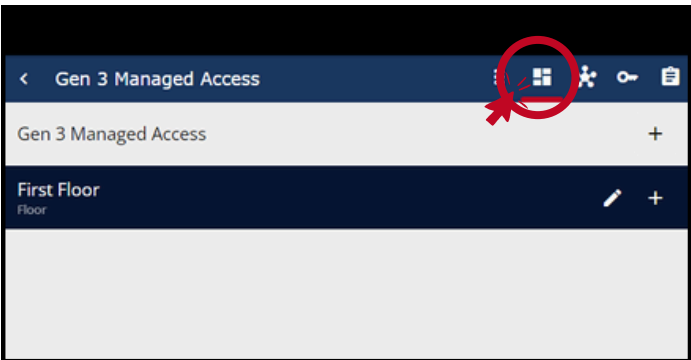
POSITION MANAGEMENT

ADDING POSITIONS

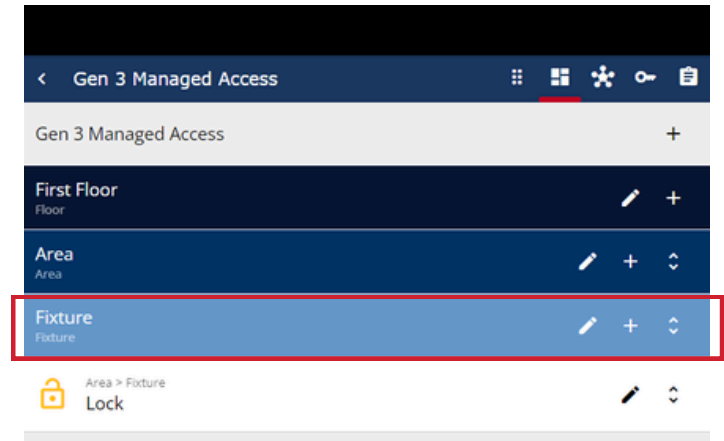
1 Begin by clicking on the store name.



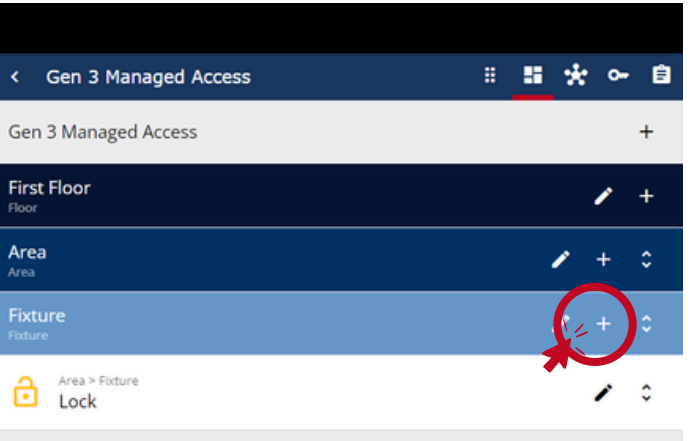
2 Click on the Store Layout icon to access the page where you can add positions.



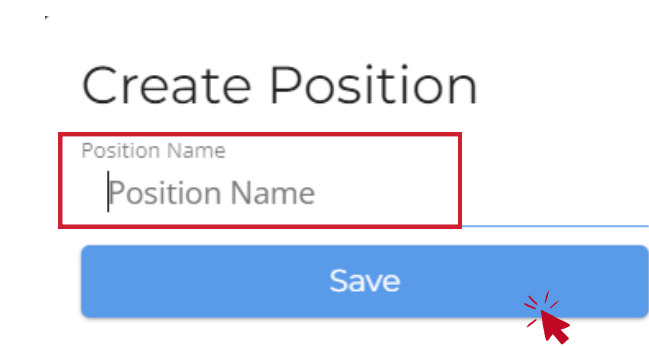
3 Expand the rows until you see the fixture you want to add a new position to.



4 Once you identified the fixture that needs a new position click on the “+” icon on the right side.

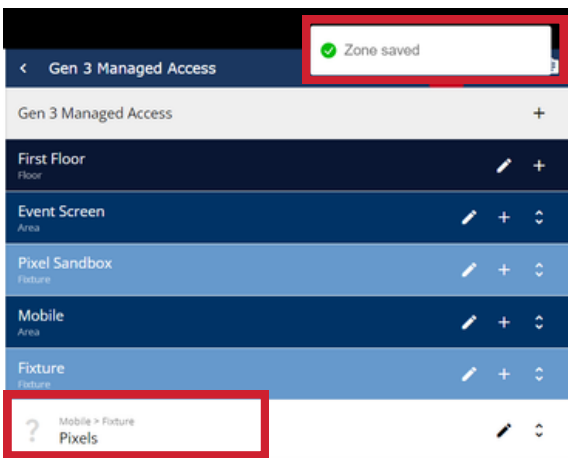


5 A pop-up will appear where you can name the new position and save it.



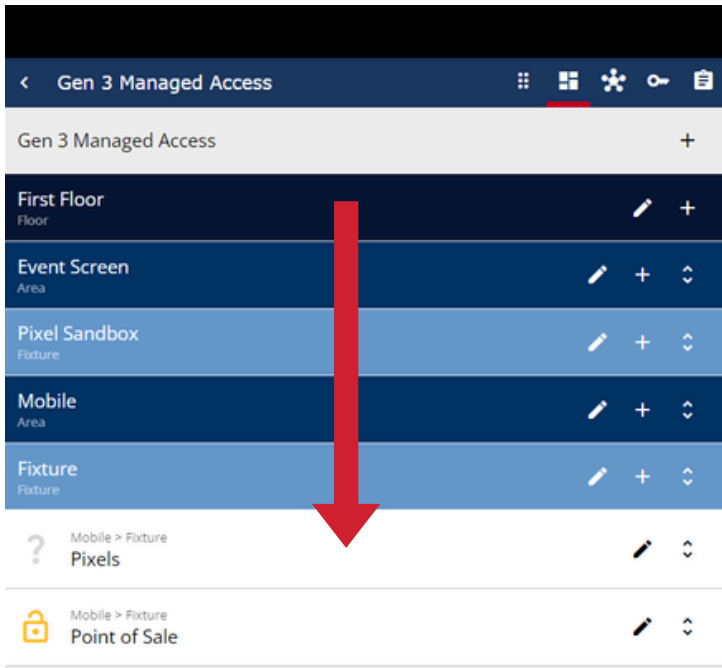
6 Once saved a notification will appear and the position will be added below the associated fixture.

Note: The confirmation will state “Zone” in this step that means Position.

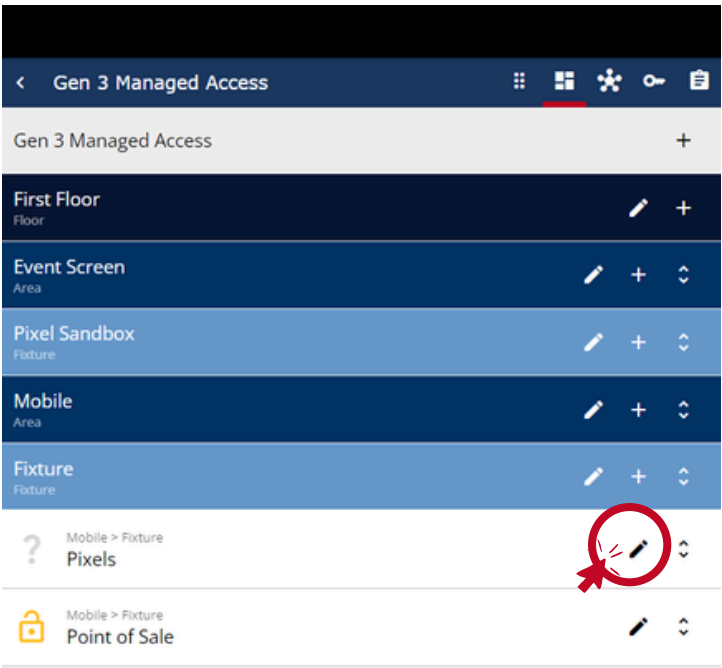


REMOVING POSITIONS

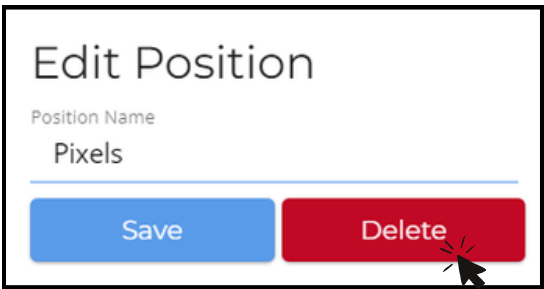
1 On the store layout navigate to the position you wish to remove.



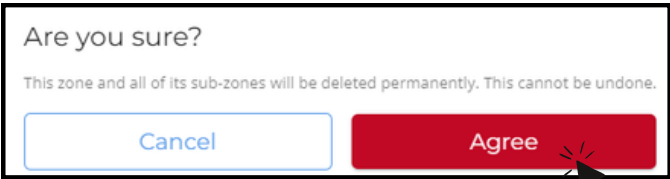
2 Click on the pencil icon. A pop-up window will appear.



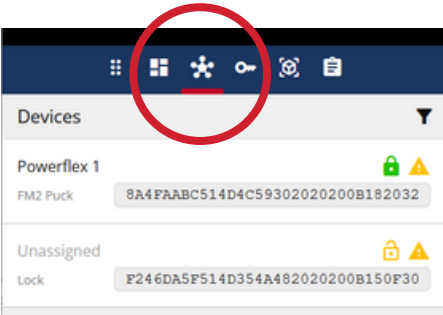
3 On this pop-up screen you can click Delete to remove the position.



4 A confirmation message will appear confirming your choice. Click agree and the position will be deleted.

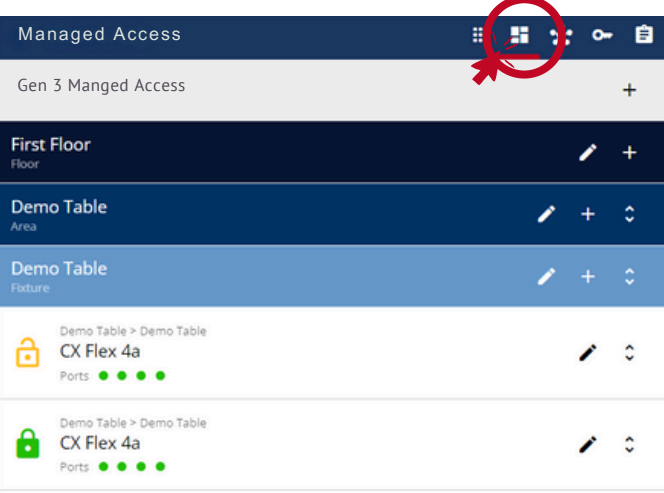


Note: Deleting a position does not delete historical activity; the CX Flex 4A associated with the position will remain within the platform under Devices pending reassignment.

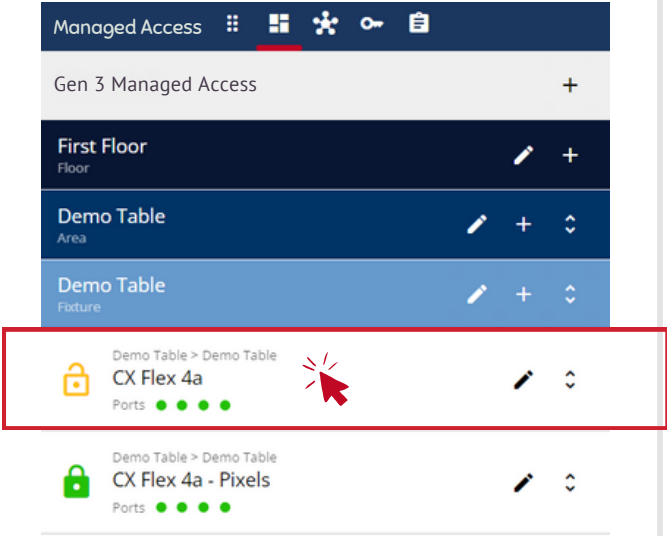


ASSIGNING PORTS

1 In the store layout, select the CX Flex position you wish to edit.



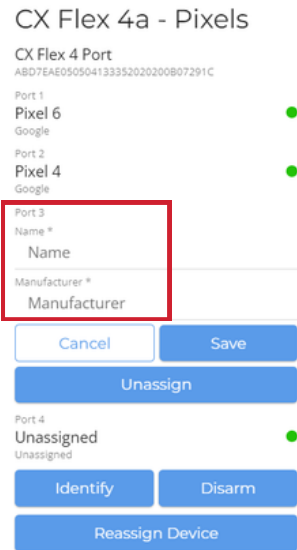
2 Click on the name of the CX Flex you wish to assign a position to.



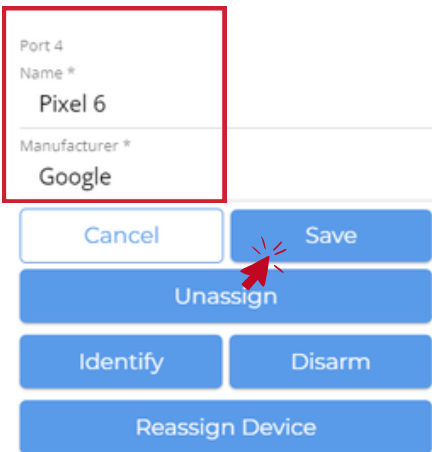
3 Click on the port name you wish to edit, a new popup will appear.



4 Edit the Name & Manufacturer



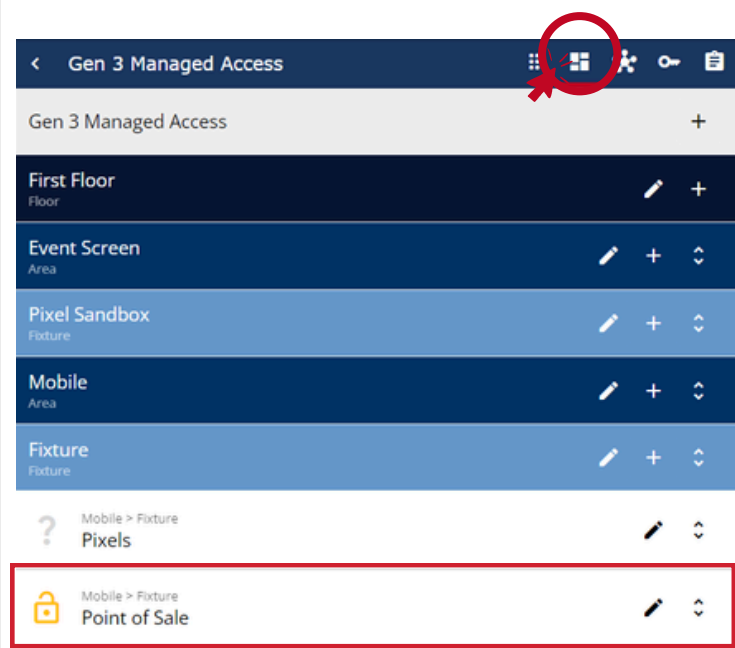
5 Once you've filled in the field you can click Save.



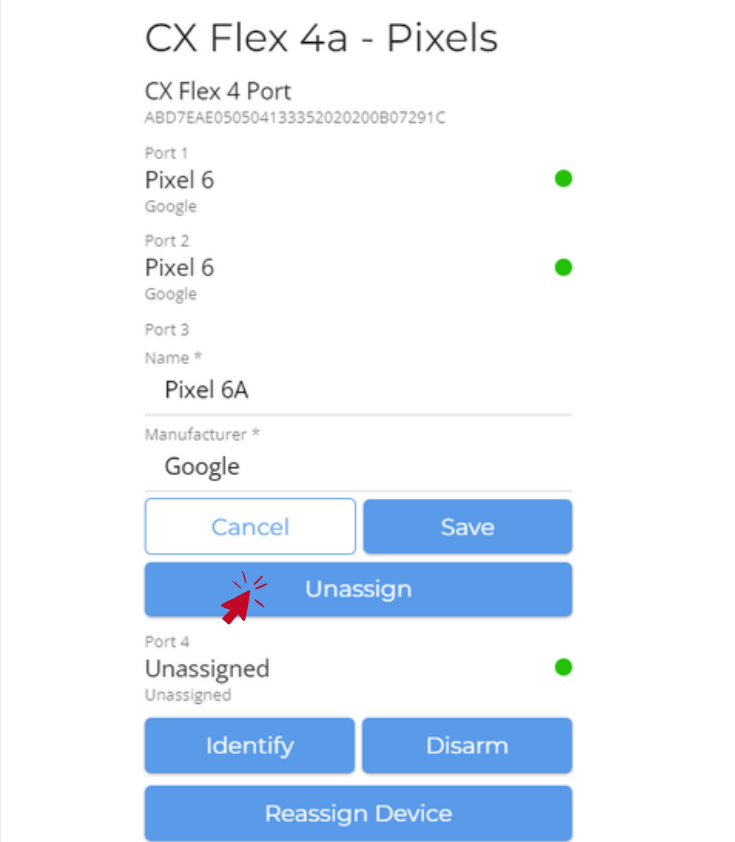
6 Refresh, and you'll see the updated assigned port.



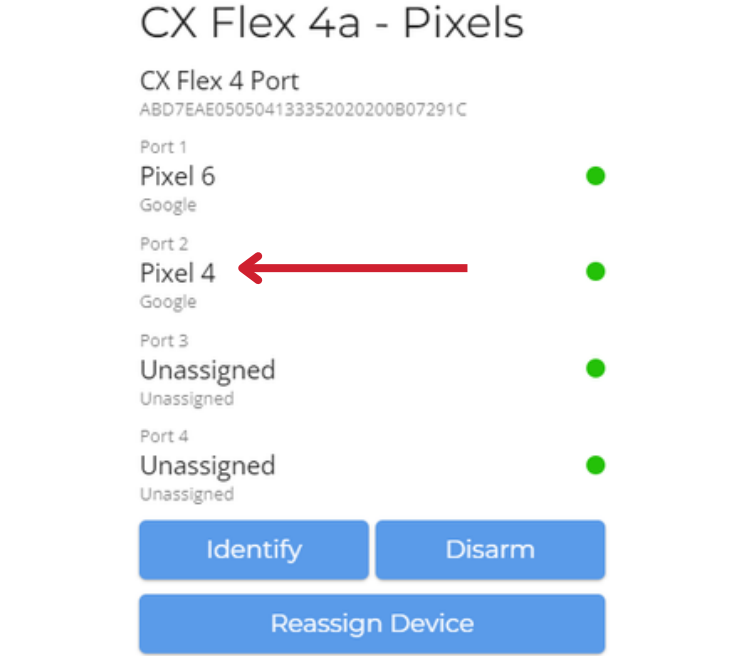
1 Navigate to your store layout and select the position you wish to edit.



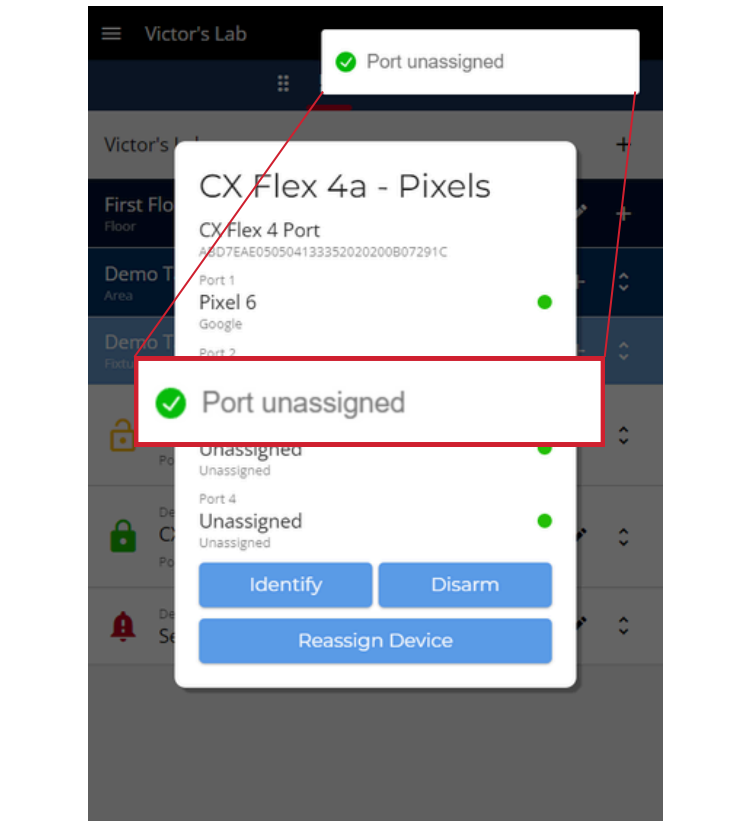
3 Click on the Unassign button to remove the product information from the port.



2 Click on the pencil icon to edit the ports.
A pop-up window will appear; select the port you wish to unassign.



4 A notification will appear confirming that the port has been unassigned.





SECURITY DEVICE PAIRING

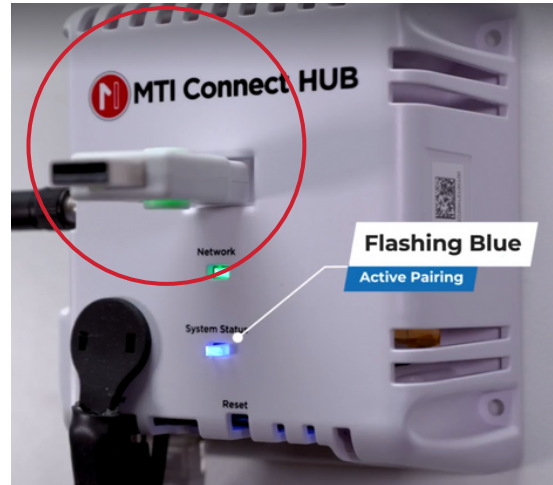
1 To pair to the MTI Connect Hub you will need to do the following.

- Ensure that the power is connected and the security device is powered on
- You will need your “Network Pairing” card



2 There are two methods for placing the MTI Hub into pairing mode.

- **Manual Method:** As shown in this step, insert USB Intellikey on top of the mini micro-USB port for 10 seconds until your status light on the hub flashes blue
- **Web Portal Method:** See next page (step 7 - 10).



3 Tap the network pairing card against the security device.

The security device will beep and flash blue; indicating that the security device is now in pairing.



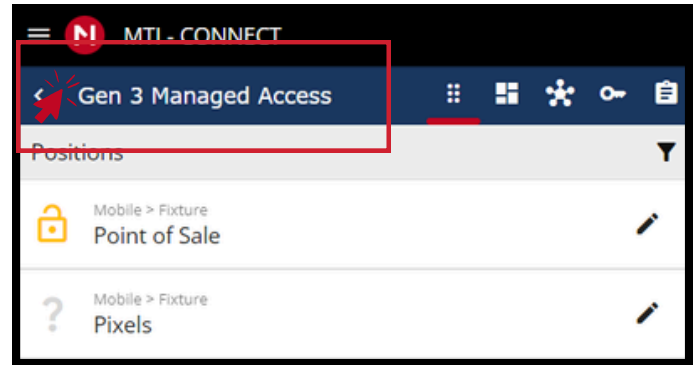
4 Once paired it will flash white and you can test that it is paired by plugging a device into the security device and using an active key or the app to arm/disarm.



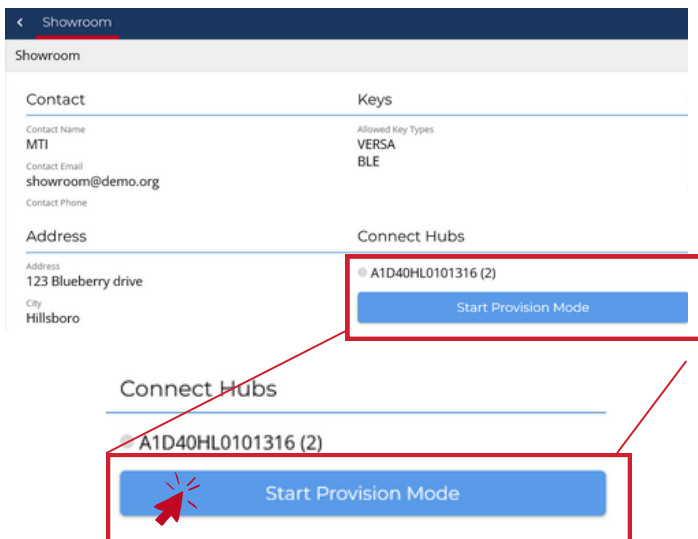
- 7 To pair with the Web Portal, log in and navigate to the store you are working on.



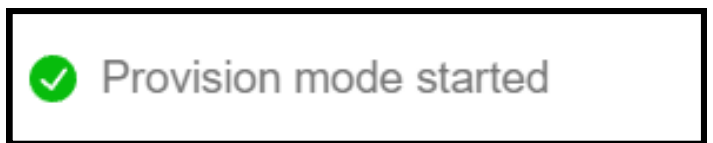
- 8 Click on the name of the store on the left hand side. It will take you to store details.



- 9 Click on **Start Provisioning Mode** to turn on pairing mode on the MTI Hub



- 10 After clicking the button you will see a confirmation box appear on the top right of your screen. You can now continue with the pairing process on your security device (see previous page step 3 - 4).





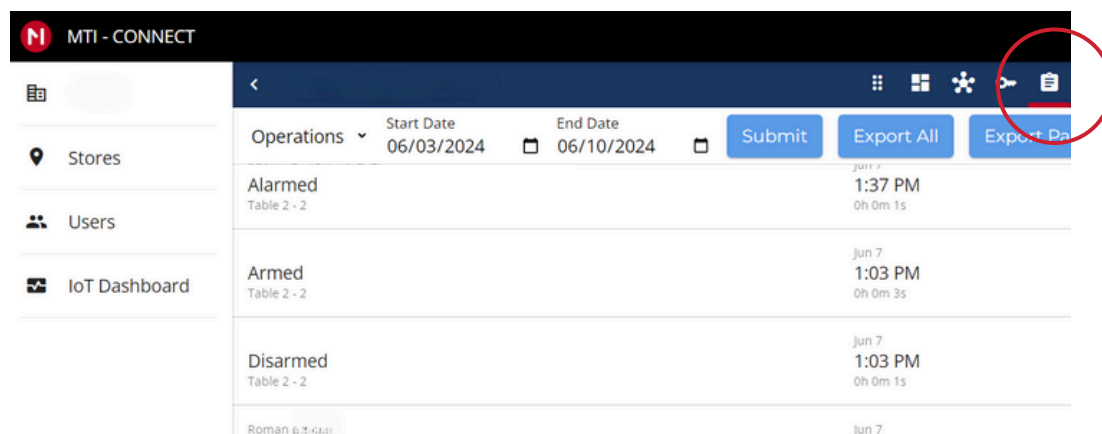
REPORTING



As part of the platform there are two methods to run store analysis as it relates to the MTI security within your store.

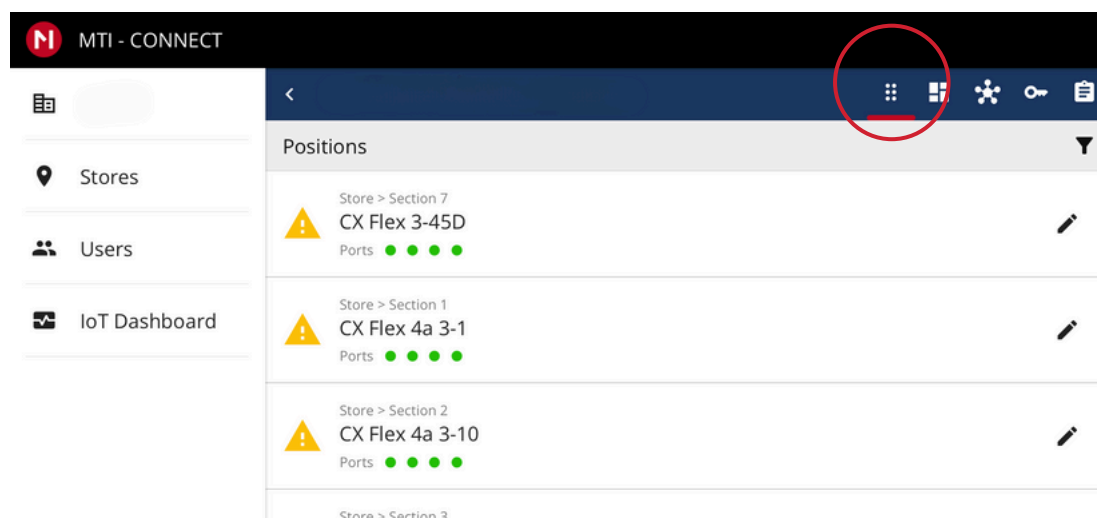
1) Historical Log

The historical log page reports on security activity that has already happened.

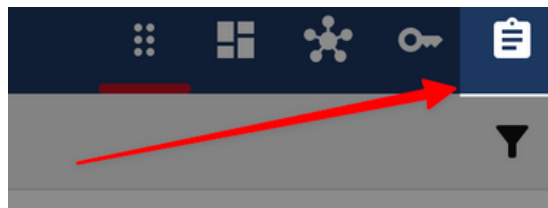


2) Exceptions

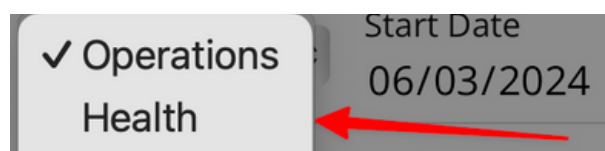
The exceptions page reports on security health that need immediate attention.



1 Select Historical Logs



2 Select Event Types: Health & Operations



3 Event Types Definitions:

- **Operations:** Shows actions performed in the store
- **Health:** Shows device health status and duration
- *Marketing: Not within use in Google Stores.*

4 Enter your desired date range

Select Dates Range to include:

Note: You can select up to 7 days range of data to be displayed

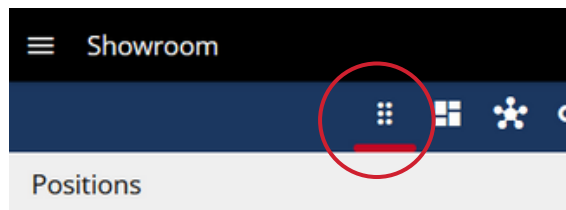
Start Date End Date
06/03/2024 06/10/2024



5 Optionally, you can select Export all to export to a CSV file.

Export All

1 Select Exceptions Icon



2 Review security health exceptions and make the necessary correction.

