



## **Schlage Utility Software - *Device Template* update**

### **Overview:**

A new feature ***Device Template*** is now available with the Schlage Utility Software (SUS version 4.11.3 or higher). The *Device Template* enables users to quickly copy and then set all “Device Properties” values across multiple AD-Series devices and ensure the devices have the exact same “Properties” settings applied.

With the *Device Template* you can quickly load identical “Lock Properties” in identical devices during installation. For example, you can give all classroom doors one set of lock properties with one template and all closet doors a second set of lock properties with a second template.

*Device Template* saves the “Lock properties” from one lock and loads them into others of the same hardware configuration.

The *Device Template* feature enables users to perform the following operations in a simple and consistent manner.

1. Quickly set the same “Properties” settings into multiple duplicate devices
2. Eliminate setup and configuration errors when commissioning multiple devices at a new site or during normal site maintenance activities
3. A simple and easy to use method to set device configuration “Properties”
4. Save and record the final configuration setting for each devices as an archive of your facility

After installation, testing, and setup are complete you can save and archive a final lock property *Device Template* for each door by saving each *Device Template* with the unique door name.

### **Affected Product:**

The Schlage Utility Software (SUS) version 4.11.3 (or higher) includes this new easy to use *Device Template* feature.

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**HHD KIT** - Hand Held Device (HHD) with pre-loaded Schlage Utility Software (SUS)\*

**AD-Series** devices and accessories: AD200, AD250, AD300, AD301, AD400, AD401, WRI400, WPR400, CT5000, PIB300, PIM400-TD2, PIM400-485

**CO-Series** devices (except CO100) the CO200 and CO250

NOTE: The *Device Template* is a Schlage AD/CO-Series feature and cannot be used with our “Legacy” products. The SUS application does not include support for the *Device Template* feature with CM or CL locks.

\* The SUS software application is provided pre-installed with the HHD KIT or it may also be found [HERE](#) on our Support web site for download

### **Issue addressed:**

It was noted in the field that setting up numerous AD-Series locks and accessories during initial installation, or during blanket updates of configuration settings, can be a time consuming and an error prone process.

It is a significant task for the installation technician to be certain that all the locks and accessories in the facility are set with the same desired configuration.

*Device Template* tackles the questions like; how was cache mode configured? What are the keypad buffing and keypad format settings on all the new locks are they a set the same?

The *Device Template* feature makes quick and consistent device settings possible across multiple devices of the same hardware configuration.

The *Device Template* feature also makes it easy to document and archive the final settings of devices in your facility.

### **Solution: Device Templates**

The new *Device Template* feature within the Schlage Utility Software (SUS) application provides a method for reducing the time it takes to update device settings on multiple devices while also ensuring that all settings are accurately accomplished.

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The new Schlage Utility Software *Device Template* feature will allow users to perform the following steps:

1. **Learn** the desired lock properties of a template lock or device. These properties settings can become the standard template for all other devices of the same hardware class during the installation
2. **Save** all device properties into a unique *Device Template* each with an individually named file in the Schlage Utility Software application
3. **Recall** a particular standard *Device Template* to be restored into any device of the same matching hardware configuration
4. **Program** multiple devices with the same *Device Template* and apply identical properties to all

**Important *Device Template* rules include:**

- The user can name the *Device Template(s)* using an appropriate descriptive name
  - Examples include: “AD200PRK offices”, “AD400MTK Building Exits”, etc. or individually for each device “Baker Hall Room 132”
  - Normal Windows OS file naming conventions are used
- Multiple *Device Templates* can be saved and restored with the same SUS/HHD
  - Generally each site will require more than one *Device Template* to manage the different lock classes and device types in use.
- *Device Templates* are stored according to the device hardware class and configuration. ONLY those devices with the exact same hardware class as the original template device will be updated. The SUS will not allow you to put AD200 lock properties into an AD300, or MAG reader properties into a Multi-tech reader because the properties are not compatible.
  - For example:
    - An AD200 with a Magnetic Swipe Reader used as the “Template” lock for a *Device Template*, that template will not

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be available when the SUS is communicating with an AD200 with a Proximity Reader installed

- **Why?** - The Credential Reader is different and settings in the template file would be miss-matched
- An AD300 with a Proximity Credential Reader used as the “Template” lock for a *Device Template* will not be available when the SUS is communicating with an AD200 with a Proximity Credential Reader installed
  - **Why?** - The lock type is different and settings in the template file would be miss-matched
- The *Device Templates* file is portable and can be copied to a PC, emailed and saved
- A *Device Template* saved on one HDD can be transferred and used by another (or multiple) HDD if desired
- It is recommended that all *Device Templates* also be stored on a separate computer or network drive for reference and as back up. If a backup is ever lost, it is a simple matter to return to the template lock or device and generate a new “*Device Template*”

## **Applying Device Templates**

**Prerequisite:** To use the *Device Template* feature the user must first have a device installed and working as desired with all of its system property settings configured to meet the end user’s needs. This device can be considered the template device for the new *Device Template*.

When a *Device Template* is saved, all properties available from the SUS “Device Options,” “Edit,” and “Reader” tabs will be saved to the device template file. The device template file can be easily and quickly recalled for saving (downloading) into another device with the same hardware configuration.

NOTE: The HDD used to generate or retrieve a *Device Template* MUST be previously “Coupled” with the device before settings can be saved OR retrieved. Refer to the appropriate device User Guide for the Coupling process description(s)

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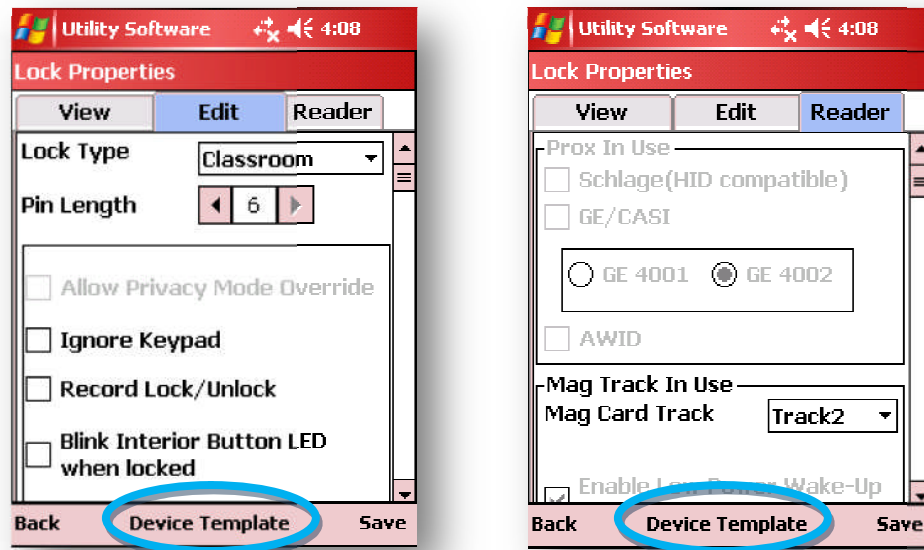
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**Schlage Utility Software Menus:** The *Device Template* menu is only available within the SUS “Lock Properties” screen and only while in the “Edit” or “Reader” tab menus.

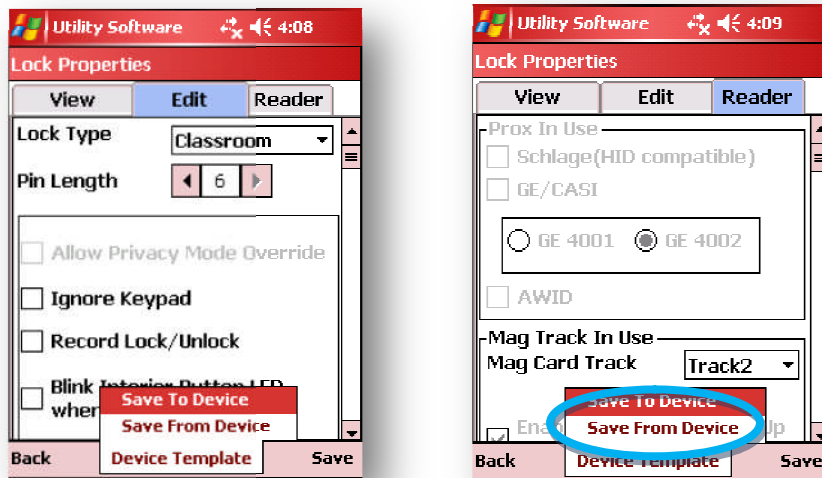
See the typical new SUS screens taken from an AD200 MSK device, below.



NOTE: The *Device Template* can be selected from either the “Edit” or “Reader” tabs. Saving or Restoring a *Device Template* from either screen will update ALL device settings, not just the “Edit” or “Reader” screen options.

**Creating a *Device Template*:** Once a device is setup and operating properly, it may be used to as a “Template” device for generation of a new *Device Template*. Using the Device Template feature, we will copy the “Lock Properties” FROM this device for saving TO additional devices giving them identical “Lock Property” values.

- A. To begin, navigate to either of the “Lock Properties” Edit or Reader tabs and tap on the *Device Template* menu. You will see the “Save To Device” and “Save From Device” menu options.



- B. Tap on the “Save From Device” menu option to bring up the screen below. This will copy the lock properties from this device (lock or module) into the SUS file.



- C. Then enter the descriptive name you want this *Device Template* to have which will also describe the device configuration the intended use of the template

NOTE: This file name should provide enough information to clearly identify the device hardware configuration and where the *Device Template* should be used and restored.

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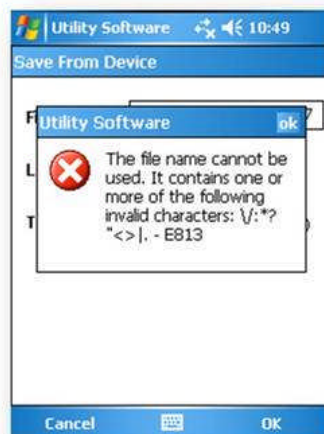
- For example: **AD200PRK-main entrances**. Clearly identifies the product and reader configuration and where the template should be used.



- D. Then tap on “OK” to save the *Device Template* as “**AD200PRK-main entrances**”

**NOTE:** As indicated in the screen above, *Device Template(s)* will be saved on the HHD in the \My Documents\ folder with a .dtf file extension

**NOTE:** All normal Windows file naming conventions are supported. Do not use special characters (?, /, \, ., etc.) when naming your template or the following Operating System error will be presented



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**Saving *Device Template*:** This simple 5 step process is used to apply a *Device Template* to a new or previously installed device

**NOTE:** Loading a *Device Template* on to a device (Lock or Module) requires that you have first saved an appropriate class of *Device Template* on the HHD or copied an appropriate class *Device Template* into the /My Documents/ folder on the HHD

**CAUTION:** When saving a “Device Template” to any PIM400, restoring a device template that modifies or updates the, ID, Frequency Channel in use, WoR or Dynamic Channel Switching (DCS) settings will cause your Wireless Access Point modules to require Linking.

See the appropriate device User Guide for Linking Instructions

**CAUTION:** When saving a “Device Template” to a PIM400-485, or PIB300 that changes the RS-485 address you will need to manually re-set and confirm the correct RS-485 address for proper system operation. The AD300 RS-485 address is not changed with a Device Template save (see Table 1 at the end of this paper)

**Perform the following steps to restore a *Device Template*:**

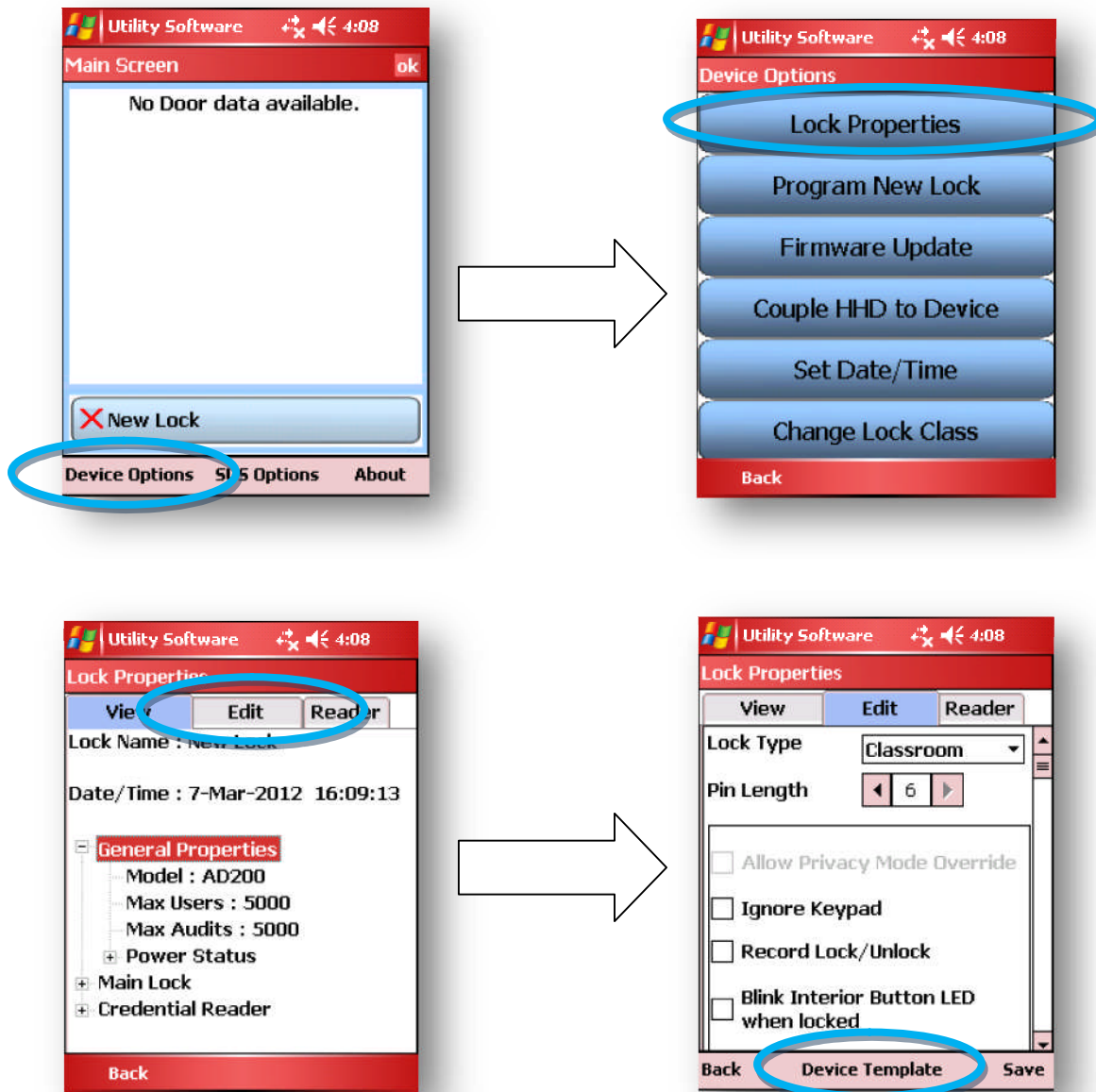
1. Connect the HHD to the device intended to receive the *Device Template* settings
2. Navigate to the “Lock Properties” screen with either the “Edit” or “Reader” tabs selected. See below:

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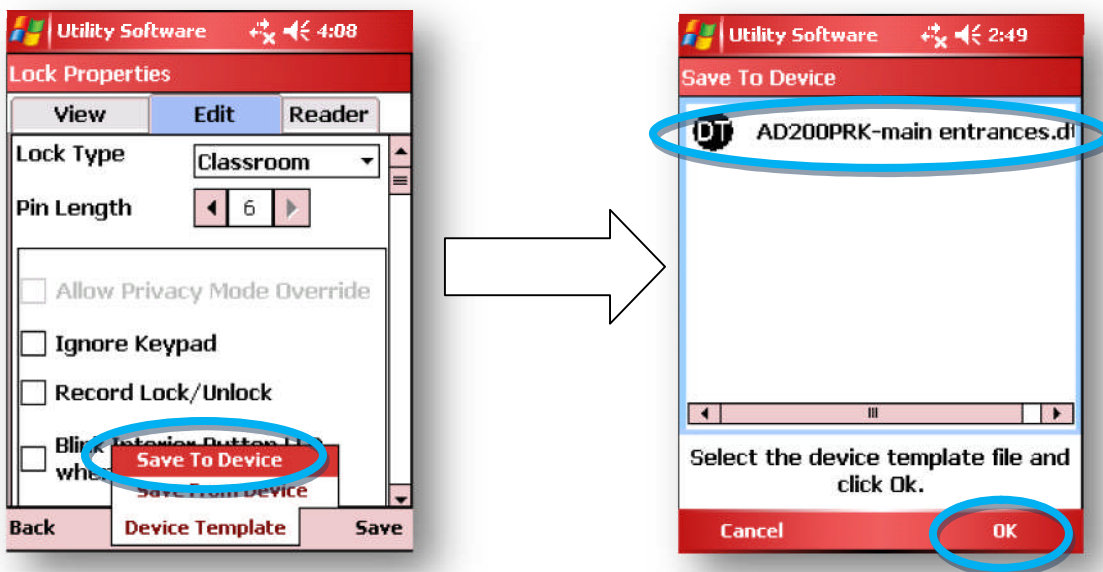
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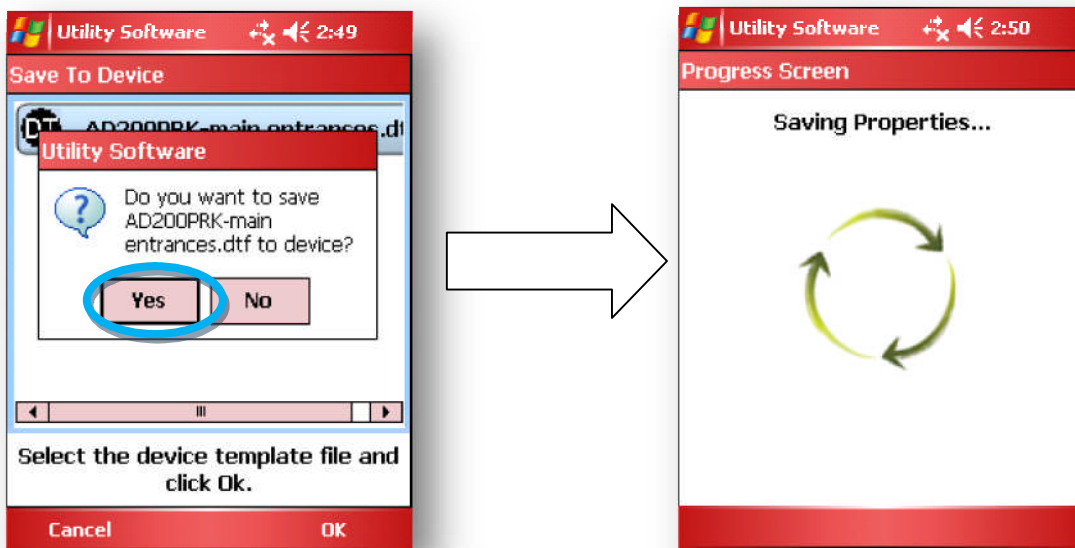


3. Tap on *Device Template* menu, (shown above) and select the “Save to Device” option, then select the *Device Template* you want to load into the device and tap “OK.” This *Device Template* file of “Lock Properties” will be loaded and saved on this lock/device. Only *Device Templates* that match this device hardware type will be presented to select. (For an AD200 PROX you will not see AD200 MAG templates)

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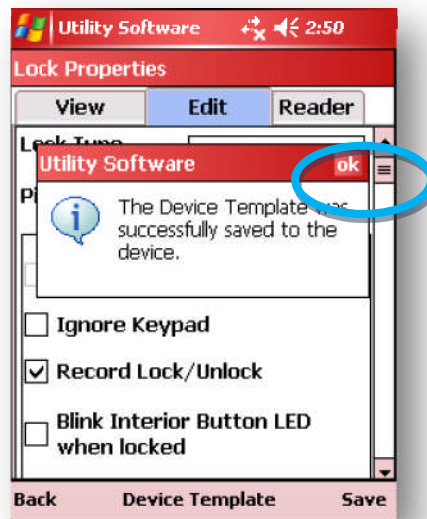


4. Select "OK" in the confirmation screen and watch the Saving Properties screen.



5. Select "YES" in the confirmation screen and the *Device Template* will be applied!

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The exact same “lock Properties” from the template device in the *Device Template* file are now loaded and saved in the connected device.

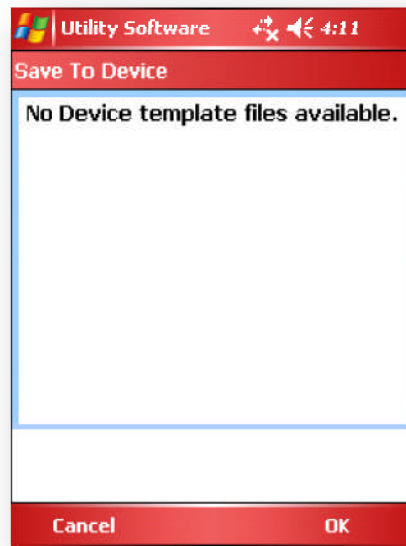
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## Frequently Asked Questions:

- A. When I try to save a *Device Template* to a new device, the *Device Template* file I was expecting to use is not available on the SUS screen.



- This will happen under the following conditions:
  - The *Device Template* was taken from a "Template" device with a different hardware configuration. The device receiving the template information MUST be the exact same hardware type as the "Template" device used to save the template. If the *Device Template* you expected is not displayed it could be a miss-matched hardware configuration. Only Template files in the SUS that match the device class you are trying to program will be displayed.
  - The *Device Template* was copied from another HDD and was not put into the present HDD \My Documents\ folder. All *Device Templates* must be copied to the HDD \My Documents\ folder before the SUS can make them available. You can use "File Explorer" on the HDD to browse and move files to the My Documents folder, when necessary

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**B. Can I save more than one *Device Template* on my HHD?**

- YES: Any number of *Device Templates* can be saved on the HHD. Most users will need more than one *Device Template*.
- Different templates will need to be defined for each device class at your facility (AD200, AD400, CO200, etc) and different credential reader hardware configurations (KP, MS, MSK, PR, PRK, MT, MTK, etc) and door uses, entrance, office, closet.
- To completely document your finished facility you could save a *Device Template* from every supported device by door name and keep backup copies.

**C. Can I use a *Device Template* to put a device back to its Factory Default (FDR) settings?**

- YES, save a "Default" *Device Template* from a template device immediately after taking it out of the box or after performing the appropriate Factory Default Reset (FDR) process for your device. See the appropriate User Guide for your device to perform a factory Default Reset (FDR)

**D. Why aren't Default *Device Templates* pre-loaded onto the HHD from the factory?**

- Default *Device Templates* are not provided (pre-loaded) on the HHD because of the numerous variations that would be required to provide a complete set of templates for every possible product configuration. Most users will need a set of templates for their final facility and they should save them with their specific site requirements
- Default settings should be applied to the customer's devices using the normal Factory Defaults Reset process. See the appropriate User Guide for your device

**E. How can I tell if a device has a template applied to it when I just want to verify**

- There is no indication a *Device Template* was previously applied. The user can view the current "Lock Properties" of the device to verify the settings are the same as the template device used to create the original *Device Template*
- If you are unsure if a device template has been applied to your device, it is simple process to re-apply the *Device Template*

**F. My Wireless device is no longer "Linked" with its PIM400 after applying a *Device Template*.**

- When the SUS applies a *Device Template* to a wireless device, all of the settings are applied at one time and the normal "Warnings" the SUS provides regarding "Lost Link" are not provided. Caution is needed when saving a *Device Template* to a installed PIM400-485, PIM400-TD
- Any change or update to the "ID," "Frequency in Use," "WoR," or "Dynamic Channel Switching" settings will cause devices to be unlinked

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**G. My hardwired online devices no longer communicate with the head in system after applying a *Device Template***

- o When saving a “Device Template” to a PIM400-485, or PIB300 that changes the RS-485 address you will need to manually re-set and confirm the correct RS-485 address for proper system operation. The *Device Template* will not change the AD300 RS-485 address, see Table 1.

**Table 1: Caution with Device Template Use**

Always save and reuse known good Device Templates. Incorrect templates can have the below undesirable results. Make sure the saved template has the desired properties.

<u>Device</u>	<u>Caution</u>
<b>PIM400-485 and PIM400-TD1</b>	<p><b>PIM400-485 &amp; PIM400-TD2</b> - <i>Device Template</i> will change the PIM400 ID, low door high door range, DCS mode, and WoR mode, which will cause loss of LINK</p> <p><b>PIM400-485</b> - <i>Device Template</i> will over write the RS-485 address which can cause ACP COM loss</p>
<b>PIM300-TD2</b>	<p><i>Device Template</i> could change the Door 1 and Door 2 address effecting RS-485 COM from the PIB300 to the devices</p> <p>Incorrect <i>Device Template</i> changes can also effect the PIB300 formats, LED control and logic levels</p>
<b>AD400/AD401/WPR400/WRI400</b>	<p><i>Device Template</i> over writes “Edit and Reader TAB” properties, effecting heartbeat and repeats, COM &amp; Power loss modes, cache mode and reader credential format settings.</p>
<b>AD200/AD250/CT5000 CO200/CO250</b>	<p><i>Device Template</i> over writes “Edit and Reader TAB” properties, effecting lock function, PIN lengths, keypad, power fail mode, delays, LED operation and reader credential format settings.</p> <p>Time settings, audits, and door files are not changed by <i>Device Templates</i></p>
<b>AD300/AD301</b>	<p><i>Device Template</i> over writes “Edit and Reader TAB” properties, effecting lock timeouts, COM loss and Power loss mode, cache, delays, LED operation and reader credential format settings.</p> <p>The RS-485 address is not permanently changed by <i>Device Template</i></p>

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TECHNICAL NOTIFICATION: SES-20120330-C

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<b>Revision</b>	<b>Date</b>	<b>Comments</b>
A	3/30/2012	First issued for "Device Template" introduction
B	6/7/2013	Added Table 1 for SUS behavior tracking over time, and text cautions on Template use related to RS-485 COM and LINKING. Also included text on using "Device Template" to save final configurations per door.

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