



OpenTech IoE
- Internet of Everything -
Platform

R24 Release Notes

OpenTech IoE Platform Release 24 went into production on July 29, 2021. The following enhancements are included in this latest release. Additional details about each feature are included in the Release Notes.

- ❖ Storage Genie Access Management by Unit Visitor
- ❖ Access Profile and Time Group Assignment by Unit

[Epic 16138] – Storage Genie Access Management

The Storage Genie app can enhance your customer’s experience by utilizing hands-free secure access to your facility. Customers can also view access history, make payments, and contact the facility through the app.

Release 24 introduces the option to disable Storage Genie access for the facility or select unit(s). This new feature is available to all Control Center users (excluding Read Only or Live Agent roles) on the Facility => Configuration left Nav in title of ‘Storage Genie’ (*refer to Figure 1*).

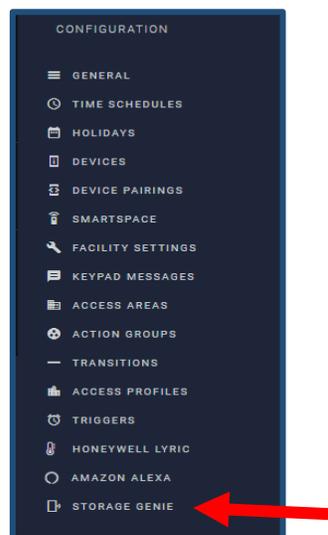


Figure 1 (New Storage Genie menu option)

When Control Center user selects the 'Storage Genie' menu option, they are presented with a new Configuration screen with three setting choices (*refer to Figure 2*):

1. Storage Genie Application
2. Storage Genie Access
3. Auto Open

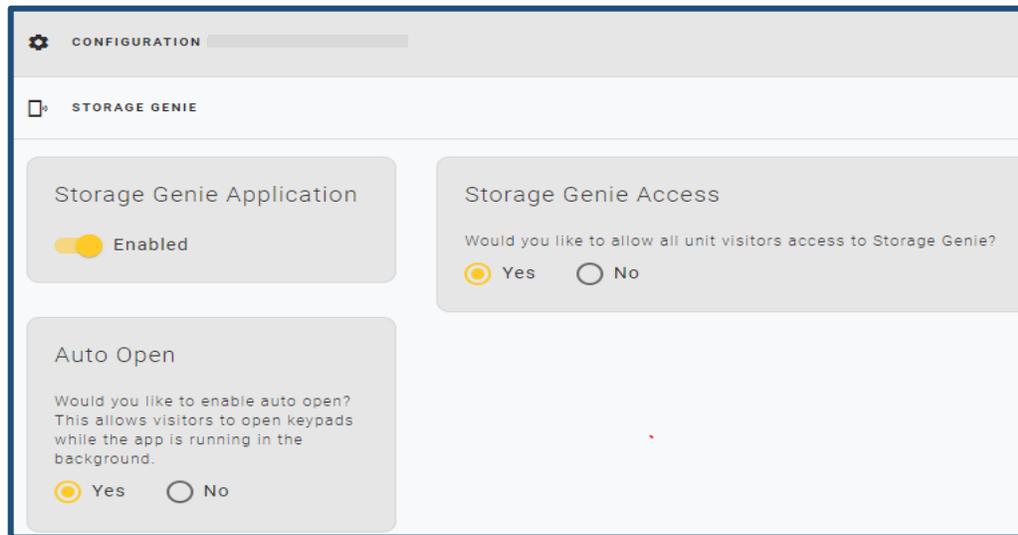


Figure 2 (New Configuration screen with three setting options)

- **Storage Genie Payment Link**
 - The Storage Genie Payment Link allows tenant to make a payment via the app.
 - The Storage Genie Payment Link was intentionally not moved to the new configuration screen, and it remains in the pre Release 24 Control Center location.
 - If a Storage Genie Payment Link was included when creating or editing a facility, the URL displays in the Storage Genie Payment Link field (*refer to Figure 3*).
 - If a Storage Genie Payment Link was not included when creating or editing a facility, the Storage Genie Payment link field is blank.

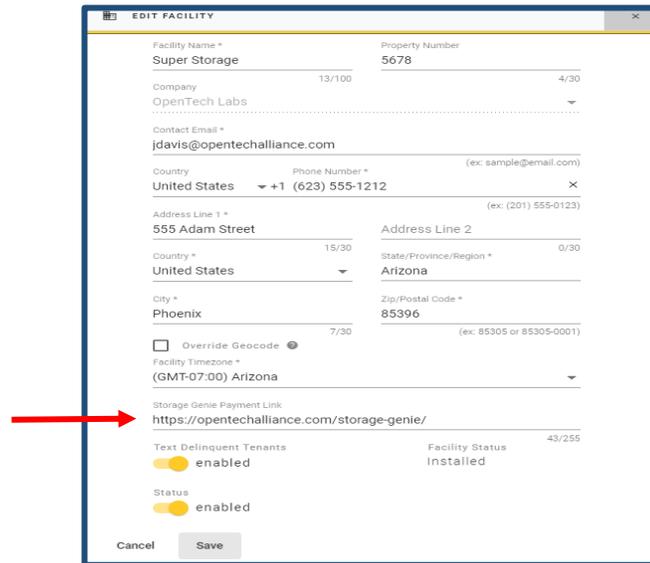


Figure 3 (Edit Facility Screen with Storage Genie Payment Link)

▪ **Auto Open Setting**

- Existing setting relocated to the new Storage Genie Configuration screen.
- Allows facility visitors to access keypads while the app is running in the background.
- The default Auto Open setting is 'No' (disabled) when a facility is initially set up.
- The Auto Open setting can be toggled from 'No' to 'Yes' and vice versa.
- If Auto Open is enabled in the Control Center, Storage Genie user sees the Auto Open toggle **green** in the app (refer to Figure 4)
- If Auto Open is disabled in the Control Center, Storage Genie user see Auto Open toggle grayed out.
- All Control Center roles with the exception of Live Agent and Read Only users can access the Auto Open setting.

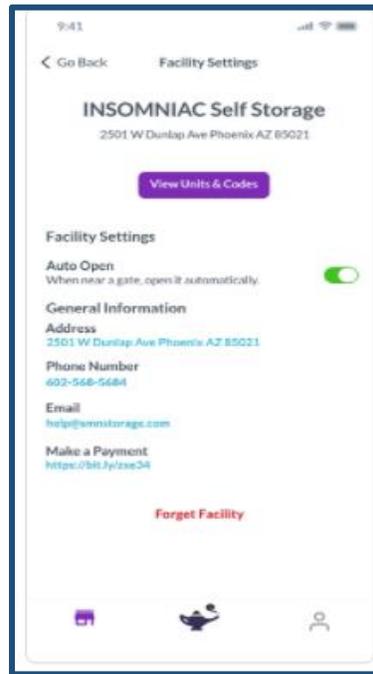


Figure 4 (Storage Genie app with Auto Open Enabled)

▪ **Storage Genie Application Setting**

- New Release 24 setting controlling access to Storage Genie for the entire facility.
- **Default is set to 'Enabled' to allow visitors to access their unit(s) via Storage Genie.**
- The setting can be toggled from 'Enabled' to 'Disabled' and vice versa.
- In order for the Storage Genie Application setting to be enabled, the facility:
 - Must be installed
 - Needs Longitude and Latitude geo-coded
 - Cannot be configured with PTI keypads
- If the Storage Genie Application setting is disabled:
 - Facility will not appear on the app's map
 - Visitor is unable to add the facility to their list view
 - A banner displays on the Storage Genie Configuration screen stating that Storage Genie is currently hidden; Storage Genie is not enabled for this facility (refer to Figure 5).

- Similar messages display if the facility is not yet installed, longitude / latitude Geo-coded or configured with PTI keypads preventing Storage Genie to be enabled.
- If visitor had previously added the facility to their My Facility list view while Storage Genie was enabled, user continues to have access to Storage Genie unless their access is specifically removed (refer to Storage Genie Access section).
- All Control Center roles with the exception of Live Agent and Read Only user can access the Storage Genie Application setting.

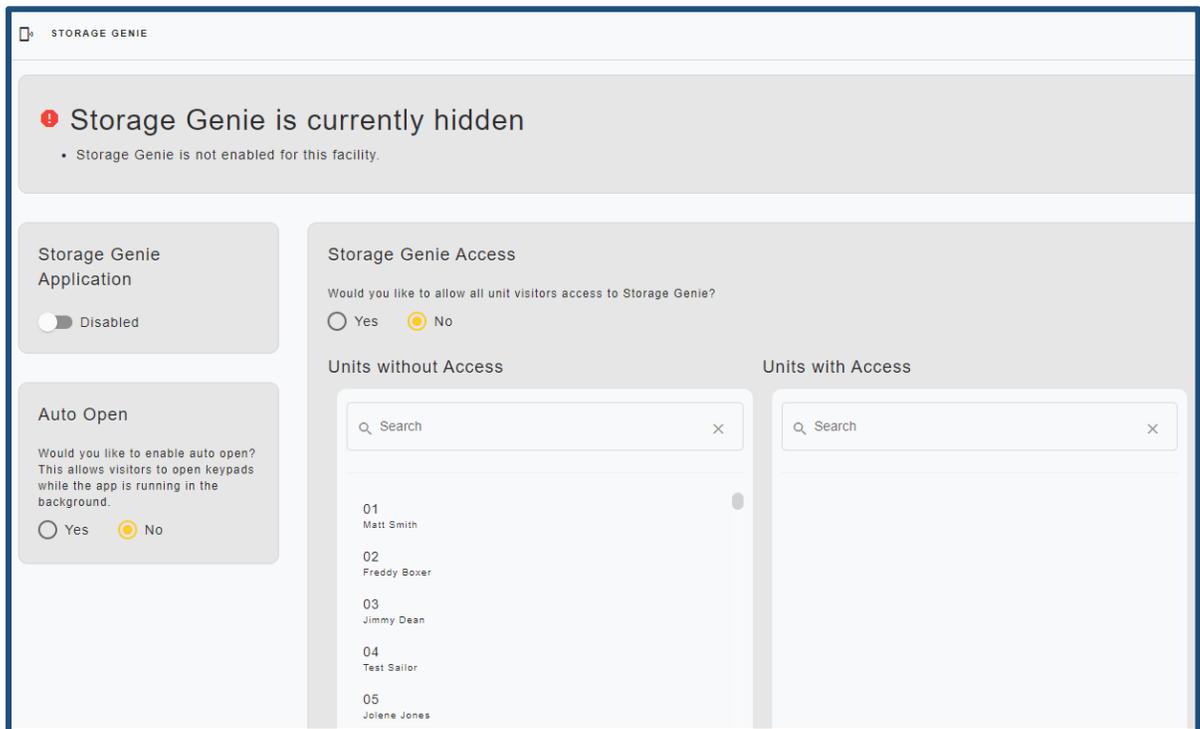


Figure 5 (Storage Genie Application setting is 'Disabled')

- **Storage Genie Access Setting**
 - New Release 24 setting controlling Storage Genie access by unit.
 - The default is set to “Yes” allowing **all** visitors to use Storage Genie.
 - If the setting is changed to ‘No’, then only units in the ‘Units with Access’ column will be able to utilize Storage Genie (i.e., only these units will be displayed in the Storage Genie app (*refer to Figure 6*)).
 - The Storage Genie Access setting persists irrespective of what updates are sent by the facility’s Property Management System (PMS); for example, a move out or tenant delinquency.
 - Control Center user can search for a specific unit or visitor with OR without Storage Genie access.
 - All Control Center roles with the exception of Live Agent and Read Only users can access the Storage Genie Access setting.

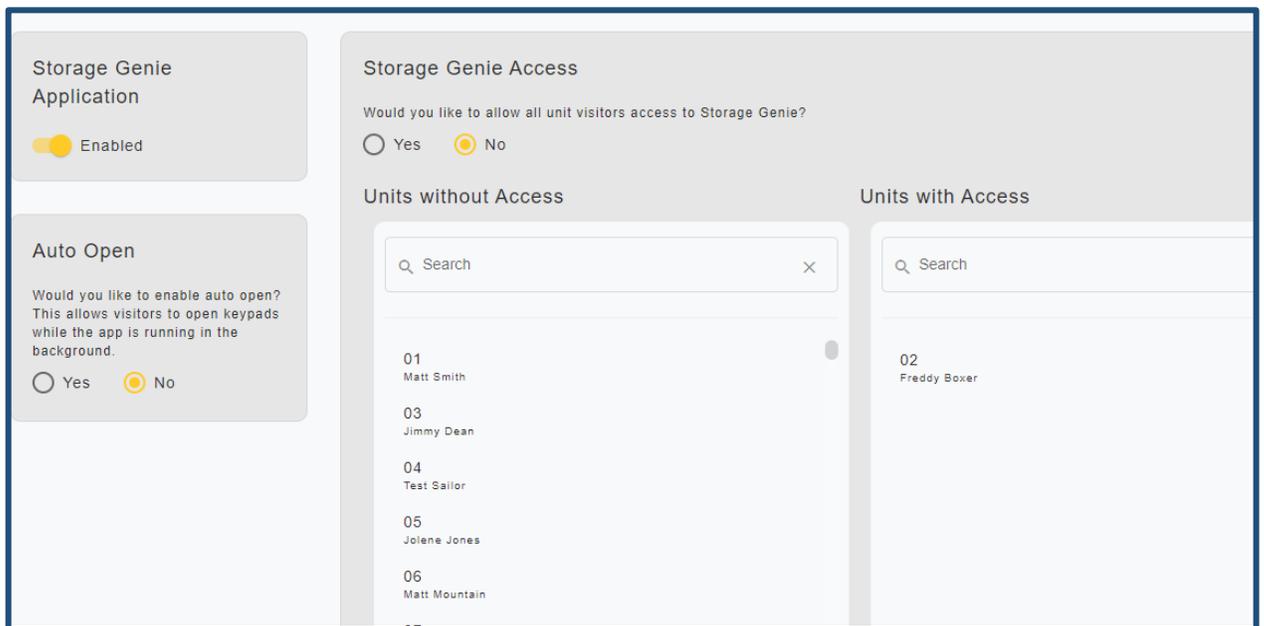


Figure 6 (Example of Storage Genie Application Enabled; five units without Storage Genie access; one unit with access)

The following stories are included in Epic 16138:

- [16140] Storage Genie: Configuration Settings - Storage Genie Access Management Screen
- [16141] Storage Genie: Configuration Setting Screen (UI)

[Epic 16144] – Access Profile & Time Group Assignment by Unit

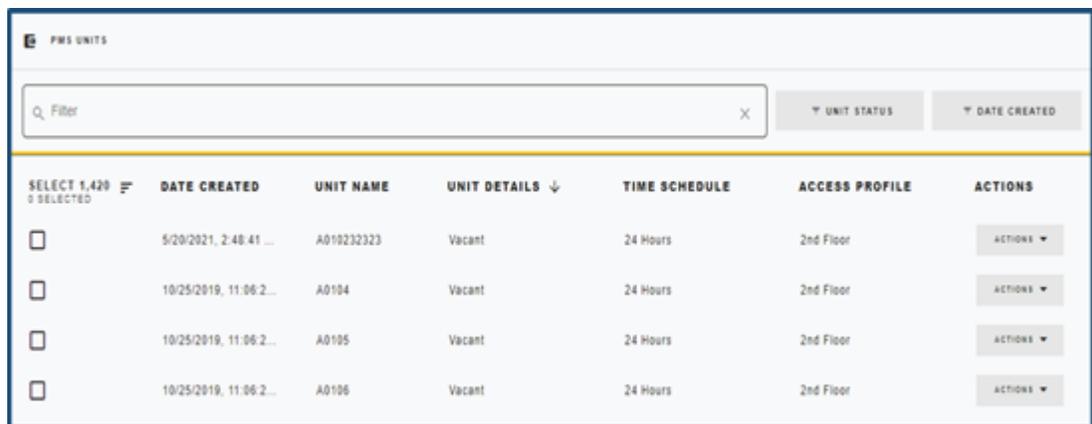
The PMS Units screen is extended to allow authorized Control Center users to override a facility's Access Profile and / or Time Schedule for one or more selected units. The override stays in effect until removed by Control Center user.

The following changes were made to the PMS Units screen:

- Shortened column widths to eliminate horizontal scrolling.
- Removed 'Guest Count' column.
- Combined 'Unit Status' and 'Tenant Name' columns into the new 'Unit Details' column:
 - If a unit has no tenant assigned, 'Unit Detail' displays 'Vacant'.
 - If a unit has a tenant assigned who is behind with payment, 'Unit Detail' column displays 'Delinquent' along with tenant name.
 - If unit is booked by a tenant in good standing, 'Unit Detail' column displays 'Rented' along with tenant name.
- The 'Delete Unit' action is available via the Actions drop down associated with the unit or via the 'Delete' button on the screen. Units can be deleted individually or in bulk.

- A new action in name of 'Override Access' is available to allow user to manage overrides to the facility Access Profile and / or Time Schedule for one unit or multiple units.
- Selecting unit(s) for access override:
 - If multiple units are checked, user selects the button in title of 'Override Access' to complete the action.
 - If a single unit is checked, user selects the 'Override Access' option on the Actions drop down adjacent to the unit.
- The 'Override Access' modal displays the following:
 - Unit(s) selected for the override action
 - Time Schedule options:
 - Preserve - Maintains the Time Schedule override
 - Remove Access Override – Removes the Time Schedule
 - Time Schedules for the facility
 - Access Profile options:
 - Preserve - Maintains the Access Profile override
 - Remove Access Override – Removes Access Profile
 - Access Profiles for the facility
- The default option for Time Schedules and Access Profiles is to 'Preserve' the current selection.
- If an override is assigned for Time Schedule, the 'Time Schedule' column will show that schedule else 'Time Schedule' column is blank indicating there is no override.
- If an override is assigned for Access Profile, the 'Access Profile' column will show that access profile else 'Access Profile' column is blank indicating there is no override.
- Access Profile and Time Schedule are mutually exclusive meaning they can be updated individually or together.
- *The 'Override Access' action overwrites any existing Access Profile(s) and / or Time Schedule previously set **EXCEPT FOR DELINQUENT TENANT**. The override remains in effect until it is explicitly removed. When the Property Management System (PMS) sends updates for the facility, Time Schedule and / or Access Profile overrides prevail, and they are not overwritten by the PMS.*
- Removing an access override for a unit that does not have an override assigned has no effect on the unit.

- Control Center user shall have the ability to filter by Access Profile or Time Schedule to display unit(s):
 - Adhering to the facility Access Profile and / or Time Schedule
 - Overriding the facility Access Profile and / or Time Schedule
- All roles with the exception of LiveAgent! and Read Only user can perform an override to the facility's Access Profile and / or Time Schedule.
- Refer to Figures 7 and 8 for examples of adding and removing overrides.



SELECT 1,420 0 SELECTED	DATE CREATED	UNIT NAME	UNIT DETAILS ↓	TIME SCHEDULE	ACCESS PROFILE	ACTIONS
<input type="checkbox"/>	5/20/2021, 2:48:41 ...	A010232323	Vacant	24 Hours	2nd Floor	ACTIONS ▼
<input type="checkbox"/>	10/25/2019, 11:06:2...	A0104	Vacant	24 Hours	2nd Floor	ACTIONS ▼
<input type="checkbox"/>	10/25/2019, 11:06:2...	A0105	Vacant	24 Hours	2nd Floor	ACTIONS ▼
<input type="checkbox"/>	10/25/2019, 11:06:2...	A0106	Vacant	24 Hours	2nd Floor	ACTIONS ▼

Figure 7 (Example of four units with Access Profile and Time Schedule Overrides to allow 24 hour access to vacant units on the 2nd floor for assumed maintenance)

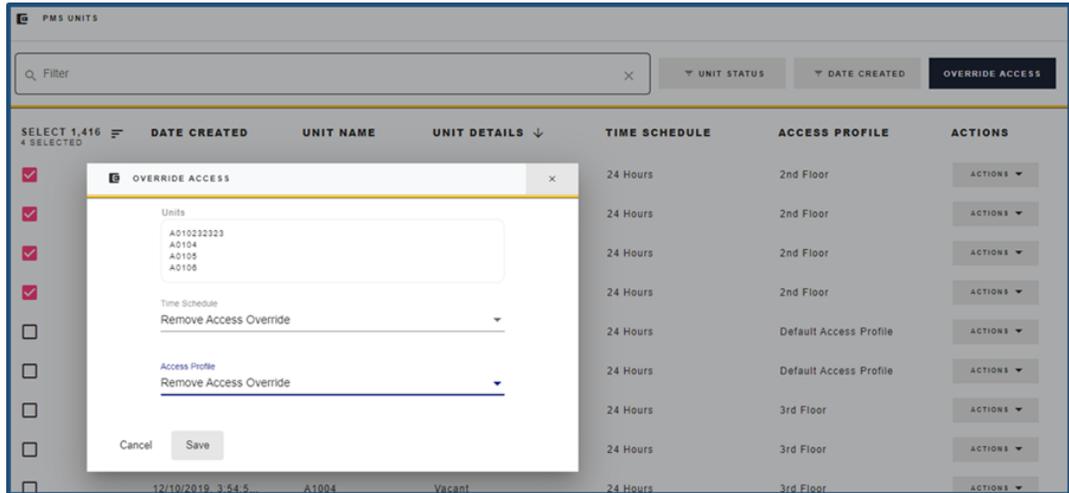


Figure 8 (Example of the same four units with Access Profile and Time Schedule Overrides being removed; Access Profile and Time Schedule revert to previous defaults and nothing will display in the 'Time Schedule' and 'Access Profile' columns)

The following story is included in Epic 16144:

- [16147] Access Profile & Time Group: Assignment by Unit

OpenTech Support

The OpenTech IoE / CIA team is available to address any questions:

- (602) 773-1700 (Option 1) **or** via email at ioesupport@opentechalliance.com