

## Overview

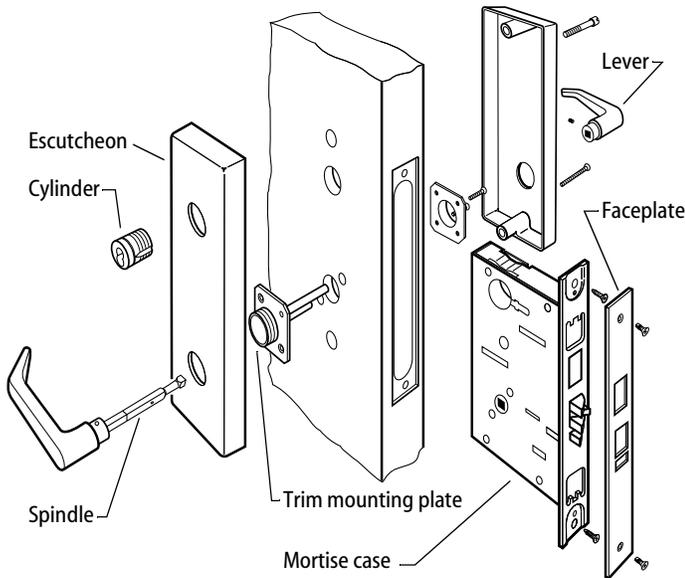


Figure 1—Exploded view of the mortise lock (M trim shown)

### 1 Mark centerlines

**Caution:** If the door is a fabricated hollow metal door, determine whether it is properly reinforced to support the lock. If door reinforcement is not adequate, consult the door manufacturer for information on proper reinforcement.

**Note:** Prepare the door according to ANSI A115.1 before using these instructions.

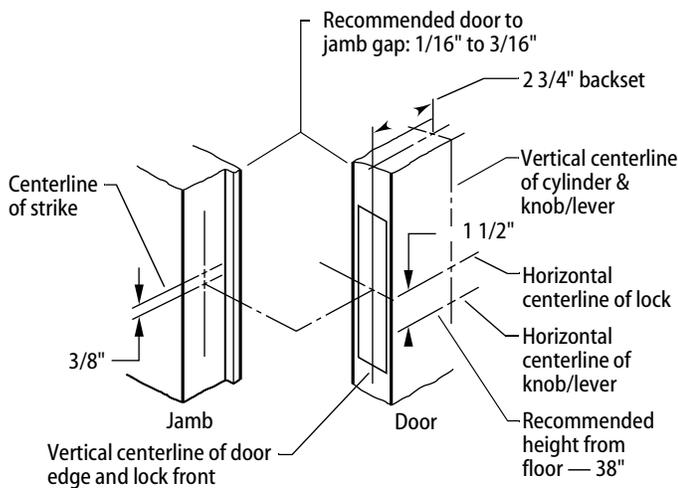


Figure 2—Marking the centerlines

- 1 Mark the horizontal centerline of the lock on both sides of the door and on the door's edge.
- 2 Mark the vertical centerline of the lock on the door edge.

- 3 Mark the vertical centerline of the cylinder & knob/lever on both sides of the door as measured from the vertical centerline on the door's edge.
- 4 Mark the horizontal centerline of the strike on the door jamb 3/8" above the horizontal centerline of the lock.

### 2 Center punch drill points

**Caution:** Only center punch the holes required for the function and trim you are installing.

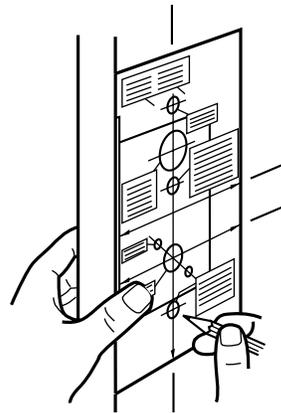


Figure 3—Punching the drill points

- 1 Cut the template along the dotted line and align the horizontal and vertical arrows to the marked centerlines on the door.
- 2 Tape the template to the door.
- 3 Center punch the appropriate drill points.

### 3 Install strike plate

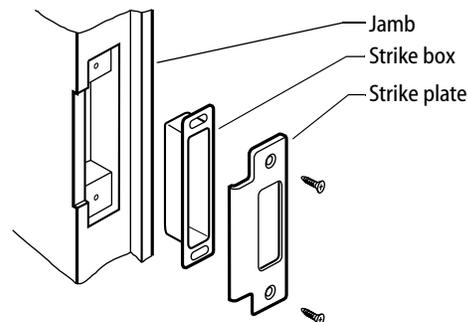


Figure 4—Installing the strike plate

- 1 Mortise the door jamb for the strike box and strike plate. When the strike box is not used, mortise the jamb deep enough to allow the latch bolt and dead bolt to fully extend. (See Installation Specifications for dimensions, template H03 and H11.)
- 2 Insert the strike box and secure the strike with screws provided.

**Caution:** The auxiliary bolt must make contact with the strike plate. The auxiliary bolt deadlocks the latchbolt and prevents someone from forcing the latch open when the door is closed. If the incorrect strike is installed, a lock-in can occur.

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## 4 Mortise and drill holes

**Note:** Check the lock for function, hand, and bevel before drilling.

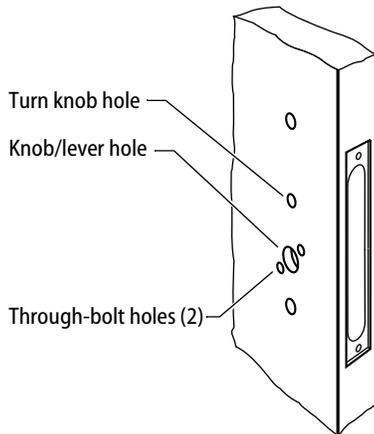


Figure 5—Hole pattern for inside of door

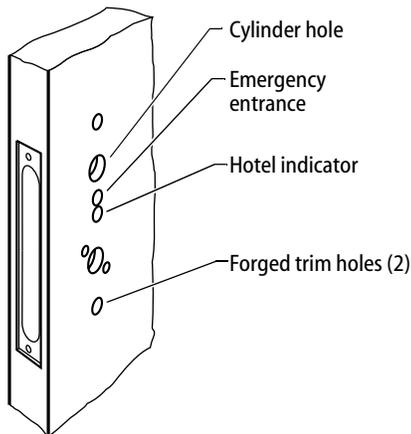


Figure 6—Hole pattern for outside of door

- 1 Mortise the door for the lock case and faceplate.
- 2 Drill only those holes required for the lock function and trim. See Installation Specifications and Hole Pattern Chart for hole requirements (templates H03 and H04).

## 5 Optional: Change hand and bevel

Check the hand and bevel of the mortise case before installing it in the door. Complete these steps if the lock hand or bevel needs to be changed.

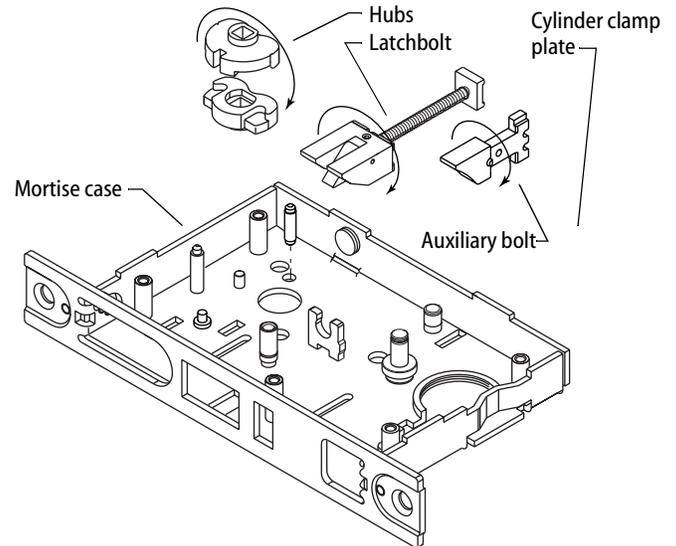


Figure 7—Changing the hand and bevel

- 1 Put the mortise case on a level surface and remove its cover.
- 2 Complete one of the following three steps:
  - To change the hand only (for example, from LH to RH)**
    - ▲ Turn over the latchbolt, auxiliary bolt, hubs (keeping the hubs together), and cylinder clamp plate, if applicable.
  - To change the bevel only: (for example, from LH to LHRB)**
    - ▲ Turn over the latchbolt and auxiliary bolt.
  - To change the hand and bevel (for example, from LH to RHRB)**
    - ▲ Turn over the hubs (keeping them together), and the cylinder clamp plate, if applicable.
- 3 Screw the cover back onto the mortise case.
- 4 Check to see if the lock works properly.

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## 6 Install mortise case

**Note:** For electrically-operated locks see the instructions in Wiring Diagrams for Electrically-Operated Locks.

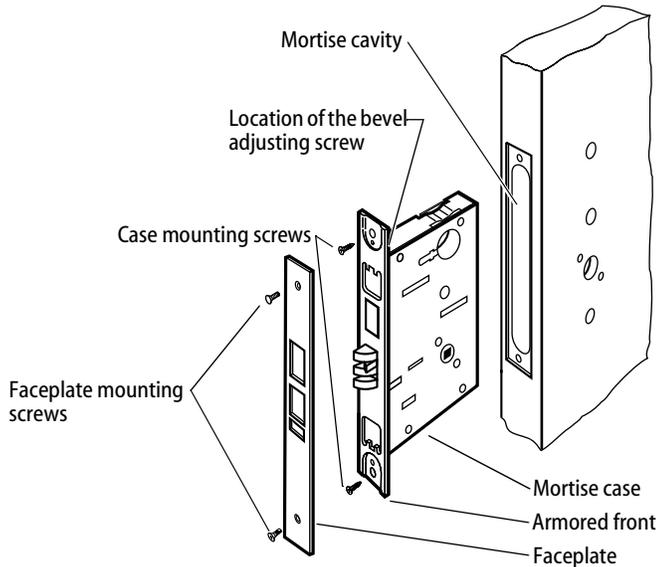


Figure 8—Installing the mortise case

- 1 Remove the faceplate from the lock.
- 2 If necessary, loosen the screws on the top and bottom of the lock case and adjust the bevel of the armored front to match the door bevel. Retighten the screws.
- 3 Install the mortise case into the mortise cavity.
- 4 Secure the mortise case in the door with the case mounting screws.

**Note:** Do not put the faceplate back on yet.

## 7 Install mounting plates, escutcheons or roses, & cylinders

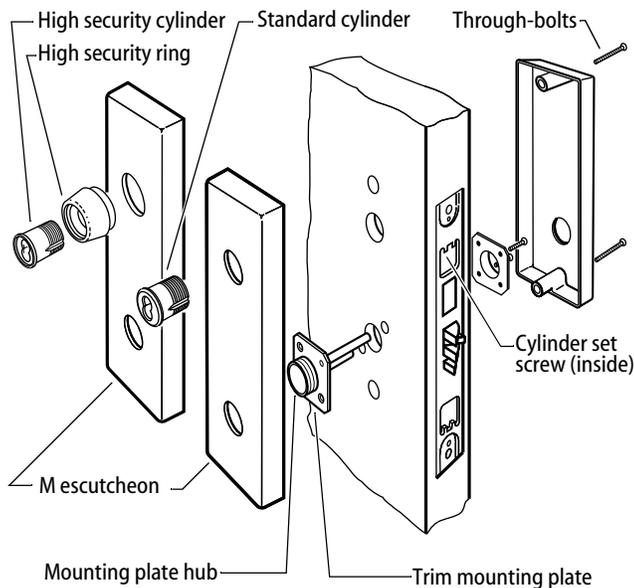


Figure 9—Installing the mounting plates, escutcheons, & cylinders

### To install the mounting plates:

- 1 For J trim, position the J alignment plate on the outside of the door. For all other trim, go to step 2.
- 2 Install the outside and inside mounting plates.
- 3 Install the two (2) mounting plate screws from the inside of the door.

**Caution:** Do not overtighten the mounting plate screws. Overtightening may compress the mortise cavity and bind the locking mechanism.

### To install the concealed cylinder (for N trim only):

- 1 With the mortise cylinder wrench inserted into the core hole, insert the cylinder into the cylinder hole on the outside of the door. Rotate the cylinder wrench clockwise until the groove around the cylinder head is even with the door surface.

**Caution:** A malfunction can occur if the cylinder is threaded in too far.

- 2 Secure the cylinder in the mortise case with the cylinder set screw.

### To install the escutcheons or roses:

- 1 Position the inside and outside escutcheons or roses on the door so they are centered on the mounting plates.
- 2 If there are escutcheon screws, install the upper and lower escutcheon screws from the inside of the door.

**Note:** The J escutcheon only has an upper escutcheon screw.

- 3 If there are escutcheon or rose rings, use the spanner wrench to install the inside and outside rings onto the mounting plates.

**Note 1:** To adjust the hotel indicator for hotel functions, see the Hotel Indicator Adjustment Instructions (T61960).

**Note 2:** For complete instructions on installing the mortise cylinder, see the Mortise Lock Cylinder Instructions (T61972).

### To install the standard cylinder or high security cylinder:

- 1 Make sure that the washer, if present, and cylinder ring are positioned on the cylinder.

**Note:** The high security cylinder does not have a washer.

- 2 With the mortise cylinder wrench inserted into the core hole, insert the cylinder assembly into the cylinder hole on the outside of the door.
- 3 For standard cylinders, rotate the mortise cylinder wrench clockwise until the cylinder ring is flush against the door.

For high security cylinders, rotate the mortise cylinder wrench clockwise until the cylinder head touches the inside rim of the cylinder ring.

**Caution:** A malfunction can occur if the cylinder is threaded in too far.

- 4 Secure the cylinder in the mortise case with the cylinder set screw.

### To install the faceplate:

Secure the mortise case faceplate to the mortise case with the faceplate mounting screws.

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## 8 Install knobs or levers

### For both levers and knobs

Unscrew the inside spindle one full turn to allow the spindles to turn freely.

### For levers

- 1 With the handle pointing toward the door hinges, put the outside lever and spindles into the lock from the outside of the door.
- 2 Slide the inside lever onto the tapered inside spindle.
- 3 Turn the set screw until it makes contact with the spindle. Then tighten the set screw approximately 3/4 of a turn.
- 4 Turn the levers to check that they work smoothly.

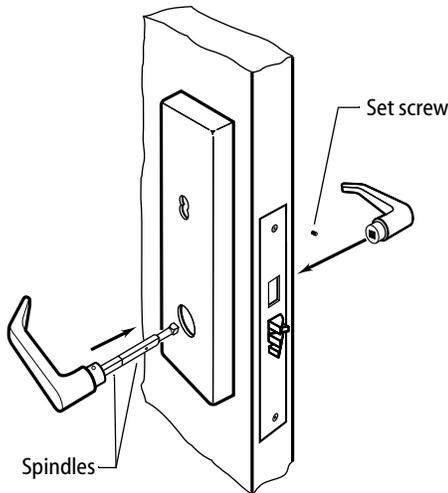


Figure 10—Installing the levers

### For knobs

- 1 From the outside of the door, put the outside knob and spindles into the lock.
- 2 Slide the inside knob onto the tapered inside spindle.
- 3 Turn the set screw until it makes contact with the spindle. Then tighten the set screw approximately 3/4 of a turn.
- 4 Push the set screw cap into the set screw hole.
- 5 Turn the knobs to check that they work smoothly.

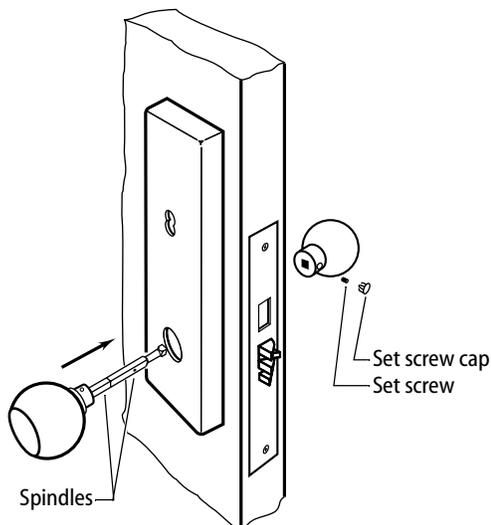


Figure 11—Installing the knobs

## 9 Install core

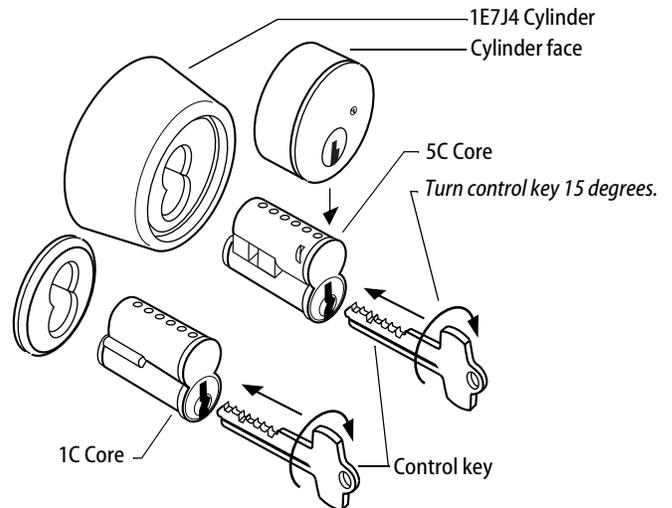


Figure 12—Installing the core

- 1 For 5C cores, slide the cylinder face down over the 5C core. For all other cores, go to step 2.
- 2 Put the control key into the core (or cylinder face) and turn the key 15 degrees clockwise.
- 3 Adjust the throw pins if needed, then put the core (and cylinder face) into the cylinder with the control key.
- 4 Turn the key 15 degrees counterclockwise and remove the key.

**Note:** Follow these steps to remove the core also.