

XPressEntry / PremiSys Integration

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For use with the XPressEntry Mobile Access Control System

By



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Purpose

This document is intended to instruct users on how to synchronize an XPressEntry system with a **PremiSys** system. XPressEntry has the capability of providing access control management from a handheld device. For XPressEntry setup information, see the document, "XPressEntry Installation and Upgrade" found at https://telaeris.com/documentation.

Pre-requisites/Requirements

- 1. XPressEntry 3.5+
- 2. PremiSys 4.7.66 or later
- 3. API Licenses:
 - a. CardholderAPI
 - b. TransactionAPI
 - c. QueryAPI
 - d. ActionAPI
- 4. Ports 30000, 30001 open for communication between XPressEntry Server and handhelds on machine where XPressEntry will be installed.
- 5. Windows 8.1+ or server type equivalent
- 6. **Optional:** Some XPressEntry synchronization functions require permissions for the Identicard Database.
 - a. Create a database user that can create and insert data into PremiSys and Cardholder databases.
 - b. SQL Server Identicard instance should be permitted for remote connections.

Limitations

- API does not allow pulling of historical activities from PremiSys to XPressEntry.
 - o It IS possible to get real-time badge scans.
- Can update occupancy to identify the current location of cardholders.

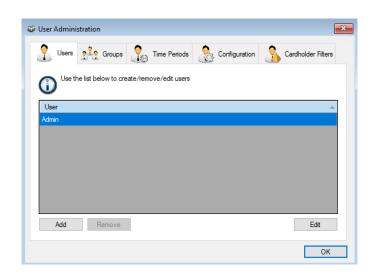
Order of Operations

- 1. Setup System PremiSys Data and Settings
- 2. Enable XPressEntry Synchronization
- 3. Set up XPressEntry Data

Setting Up PremiSys to Synchronize with XPressEntry

It is assumed that a version of PremiSys and XPressEntry are installed on computers or virtual machines that can **talk to each other**, or the **same** computer or virtual machine.

To install XPressEntry, you must have Administrator privileges on its respective machine. You must additionally be an **Administrator** or super user in the **PremiSys** System.



Enable XPressEntry Synchronization

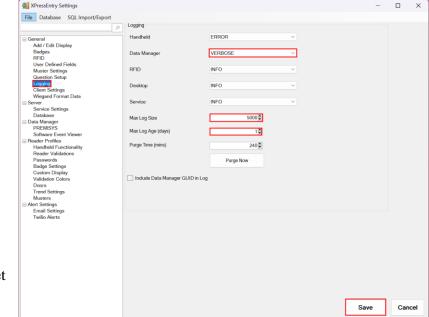
XPressEntry uses a module called Data Manager to synchronize all data with PremiSys. From the main page of XPressEntry, go to XPressEntry > Settings (ALT+S or **Tools > Settings**).



General Tab

- 1. From the Settings page, select **General > Logging**.
- Set the Data Manager Log level to **DEBUG** or **VERBOSE**
 - a. This will allow you to view log entries during the sync process.
- 3. Max Log Size **5000** or higher
- 4. Max Log Age 1 Day or higher

Once the integration is complete, set the log level to **ERROR** so only error messages will be tracked.

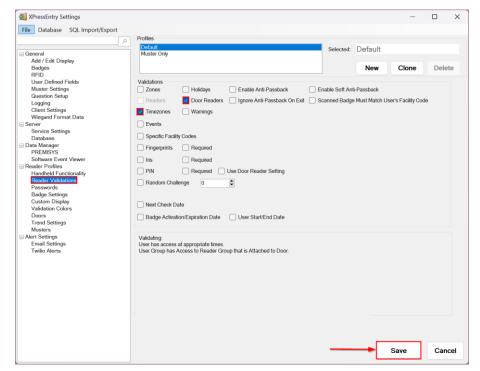


Reader Profile Tab

- 1. Go to **Reader Profiles > Reader Validations**. This is where you configure the handhelds.
- 2. Ensure that **Door Readers** and **Timezones** are the only mode checked under

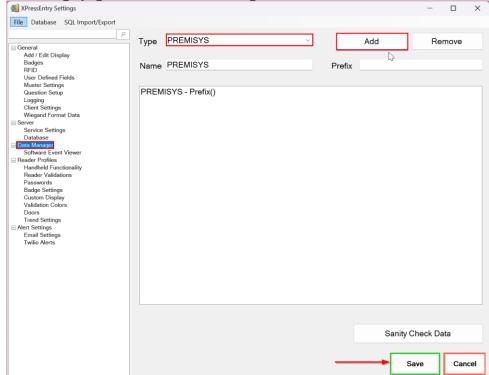
Validations.

3. Select **Save** at the bottom right when finished.



Data Manager Tab

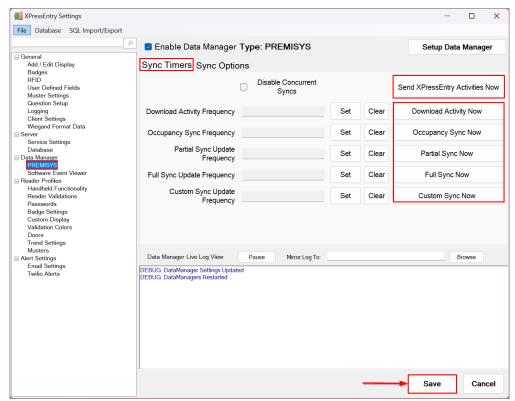
From the Settings page select the Data Manager Tab.



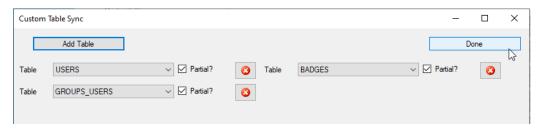
- 1. **Type** This is the integration type. Select **PREMISYS** > **Add** > **Save.**
- 2. Go to **Data Manager** > **PREMISYS** in sidebar menu.

3. **Setup Data Manager** – This sends you to the setup form for PREMISYS data manager. Sync Timers

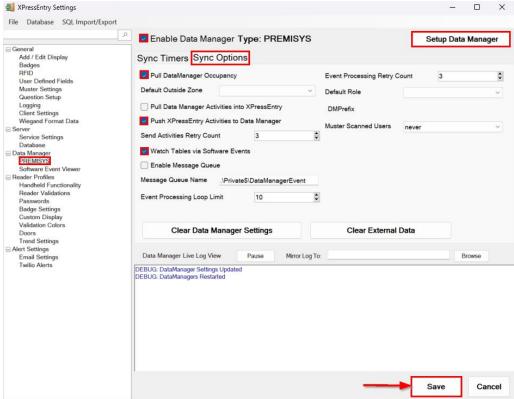
XPressEntry uses Timers to pull PremiSys data into XPressEntry.



- 1. **Download Activity Frequency** Pulls reader scan records into XPressEntry and stores them in XPressEntry's activity table. This function also updates the zone occupancy.
- 2. **Occupancy Sync Frequency** Updates the zone occupancy without storing the activity records.
- 3. **Partial Sync Frequency** Pulls all data excluding cardholder data, including readers, areas, access levels. It will only grab the last x number of users that were added to the system.
- 4. **Full Sync Update Frequency** Updates all tables by pulling all necessary records from PremiSys. This function may take some time.
 - a. It is recommended to run a full sync **once per day** in the middle of the night when the system is not busy.
- 5. **Custom Sync Frequency** Updates a set of tables that the user configures.
 - a. To configure, right click Custom Sync Now and select Edit Custom Sync.



Sync Options



- 1. **Pull Data Manager Occupancy** Enables use of the Occupancy Sync.
- 2. **Pull Data Manager Activities into XPressEntry** Enables use of the Activity Sync.
- 3. **Push XPressEntry Activities to Data Manager** Enables XPressEntry to push Scan data to PremiSys.
- 4. **Send Activities Retry Count** Number of times XPressEntry will attempt to resend an activity if it fails.
- 5. **Default Role** The default XPressEntry Role that will be assigned to users if the integration does not otherwise assign a role. Entrants are recommended but not required.
- 6. **Muster Scanned Users** Enables sync to convert scans from specific readers to be converted into Muster Scans which mark users as safe. Muster readers must be configured in the reader data. Please see *Mustering Documentation* for more details.
- 7. **Setup DataManager Button** Opens PremiSys specific settings.
- 8. **Clear DataManager Settings** Resets all settings on the two above tabs, as well as the PremiSys specific settings.
- 9. **Clear External Data** Deletes all data synced from PremiSys from the XPressEntry Database.

PremiSys Data Manager Setup Page

Press the **Setup Data Manager** button to get the PremiSys specific setup screen. In the new window, you will see the following:

- 1. **Server IP** IP address of the system where PremiSys server is hosted.
- 2. **Query API Port** Query API Port for PremiSys Server.

3. **Data API Port** – Data API Port for PremiSys Server. PremiSys Data Manager Setup 4. Transaction API Port Transaction API Port General Database Details for PremiSys Server. Server IP: premisys47.ad.telaeris.com Query API Port : 5. **User Name** – PremiSys User Name : Admin Data API Port 9003 System username Password: Transaction API Port : 9002 6. **Password** – PremiSys System password Server Timezone : Pacific Standard Time V 7. Server Timezone – Timezone of the PremiSys server. It is **Test Connect** Defaults OK

Click **Test Connect** after entering all the data correctly. This will connect to the PremiSys system using the given user's name and password.

The result will display **Connection Success!** if connected to PremiSys successfully. If there is any error in the connection it will show in the same result window.

- 1. Database Server 🖷 PremiSys Data Manager Setup Address/Name of the General Database Details **IDENTICARD SOL** Database Server Enable Database Connection premisys47.ad.telaeris.com\IDENTICA Server Instance. Port 1433 2. **Port** – SQL Server DB admin User ID Test Database Connection ******** Password Port. It would be 1433 Database Name by default if there are PremiSvs no other SQL Server instances installed. **Test Connect** Defaults OK 3. **User ID** – SQL Server User ID that has access
- 4. **Password** SQL Server Password for the user.

to PremiSys database.

set to PST by default.

5. **Enable Database Connection** – Uncheck the option if you don't want to enable the functions that require database access to IDenticard.

Click **Test Database Connection** after entering all the data correctly. This will open a connection to the PremiSys database using the given DB user name and password, and the result will display **Connection Success!** if connected to PremiSys DB successfully. If there is any error in the connection, it will show in the same result window.

Exit out of this form. On the Data Manager tab of the Settings form, select **Save**. It is now time to begin syncing data.

Enable XPressEntry Synchronization XPressEntry Data

After setting up the data manager, run the initial **Full Sync** to pull data from PremiSys. Once the PremiSys system is set up and synchronizing, you will see this data represented in XPressEntry under the **Add/Edit Info** tab.

Data which is imported from PremiSys **cannot be changed** and is greyed out in XPressEntry without proper permissions.

Sync Check

The purpose of this section is to help the operator understand exactly what data XPressEntry is pulling from PremiSys. For a quick setup, please navigate to the next section, **Set up XPressEntry Data.**

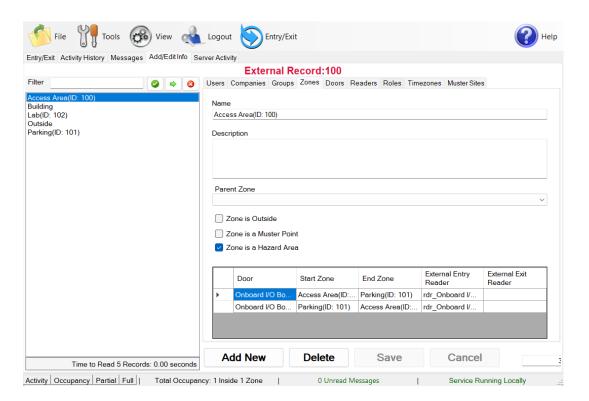
PremiSys	XPressEntry
Access Area	Zone
Door	Reader
Door	Door
Cardholders	Users
Cards	Badges
Timezones	Time Zones
Access Levels	Groups
Access Levels	Reader Groups
Card Access Rights	User Permissions

Zones

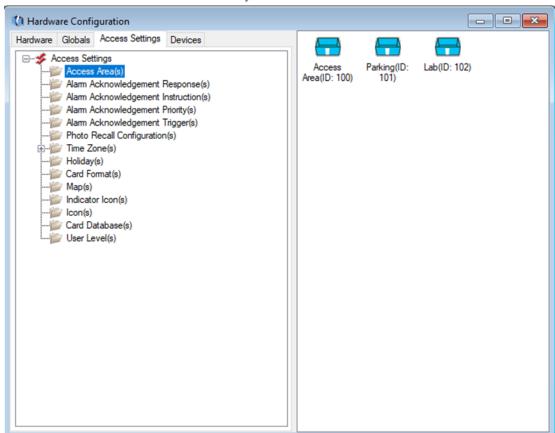
All **Access Areas** in PremiSys should be available to view in the **Zones** tab under **Add/Edit Info**.

Here is an example of properly synchronized zones:

XPressEntry Zones



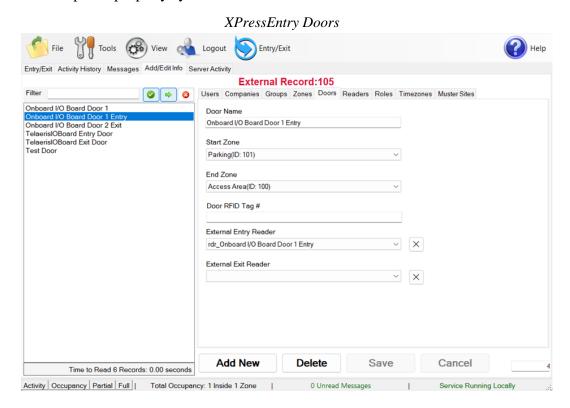
PremiSys Access Areas



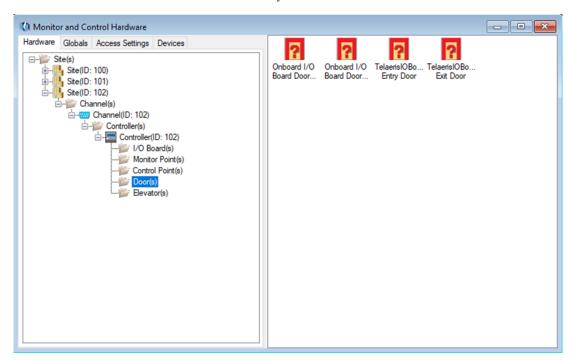
Doors

All doors from all sites are available to view in the **Doors** tab under **Add/Edit Info**.

Here is an example of properly synchronized doors:

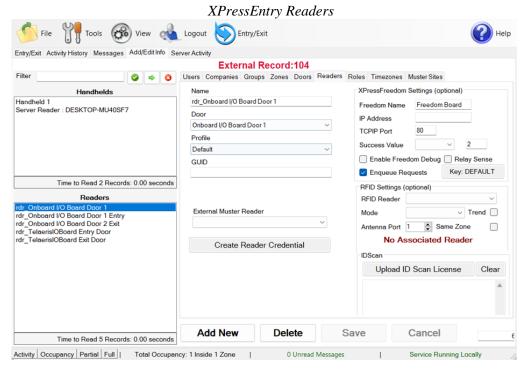


PremiSys Doors



Readers

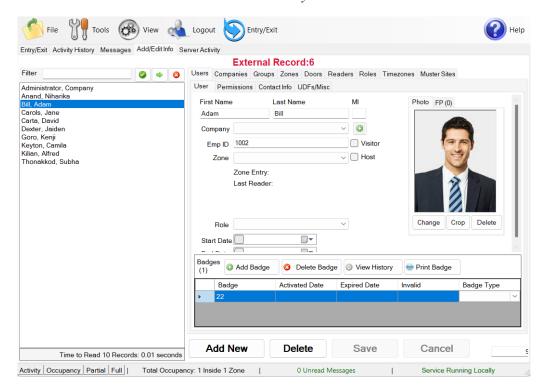
Since PremiSys sends activities through doors, readers are created from each door in XPressEntry automatically.



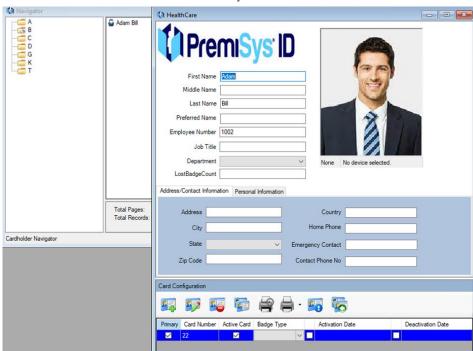
Users

Here is an example of a properly synchronized user:

XPressEntry Users



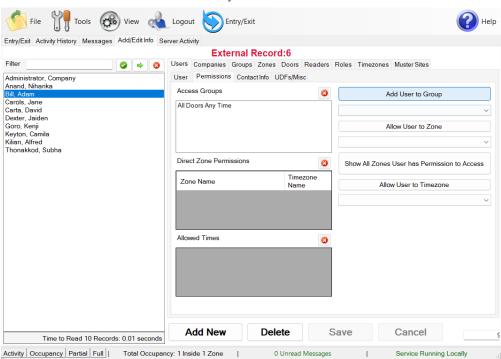
XPressEntry will pull the user's image and badge number from PremiSys. You can see the badge number at the bottom of the screen.



PremiSys Users

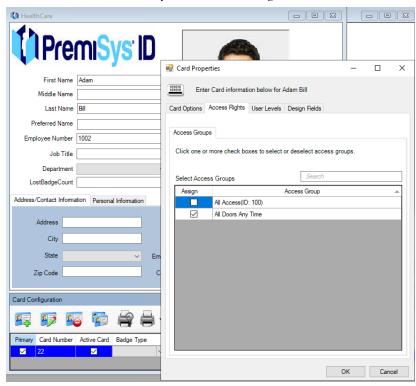
User Permissions

Users in XPressEntry have the same permissions to each reader as they do in PremiSys.



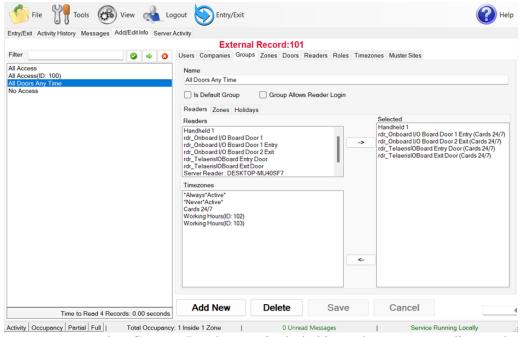
XPressEntry User Permissions

PremiSys Card Access Rights



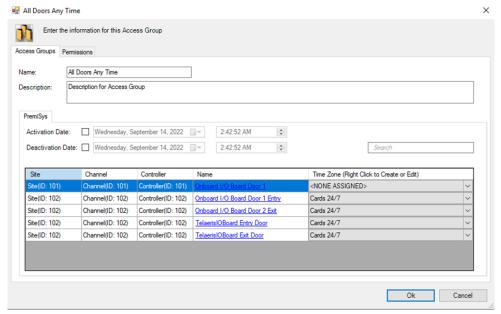
Groups

XPressEntry Groups



Access Groups are mapped to Groups. Readers are included in each group according to the readers assigned for each Access Group.

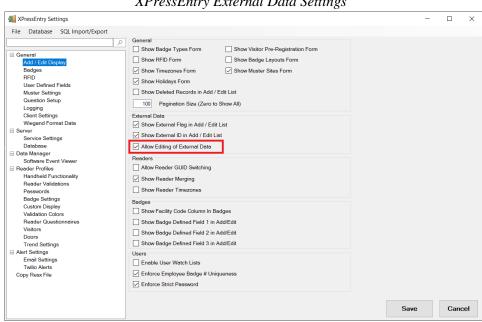
PremiSys Access Levels



Configuring XPressEntry Using PremiSys Data

Now that XPressEntry has been synchronized with the PremiSys database, it needs to be configured to use this information. The tabs that need to be configured are the Doors, Readers, and Zones.

In the XPressEntry system, editing of any external data is **disabled by default**. To enable the settings, go to XPressEntry Settings > General Tab > Add/Edit Display then check the option Allow Editing of External Data in the External Data Section.



XPressEntry External Data Settings

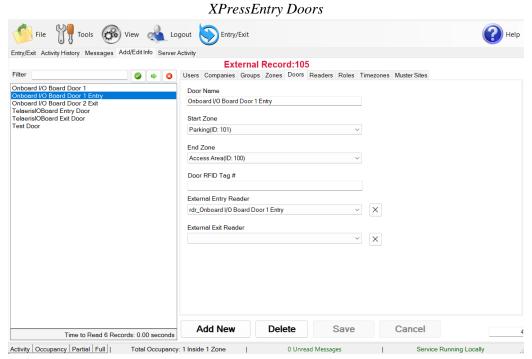
Configuring Doors

Entry/Exit permissions in XPressEntry are set by doors. Doors contain **two** readers – an **exit** and an **entry** reader. Door access is determined by the User's access to the door's reader.

- For entry, permission is based on the user's access to the door's external entry reader.
- For exit, permission is based on the user's access to the door's external exit reader.

Doors should be set by the user for each Handheld Reader in XPressEntry.

The XPressEntry Integration with PremiSys can use **AccessAreas** assigned in PremiSys as **zones**.



- 1. **Zones** For each door, set the **start** zone and **end** zone in **PremiSys**. This will "enter" a user in the specified zone when they enter or exit (or scan at a PremiSys door).
- 2. **External Readers** The External Entry Reader is automatically set to the **Reader** that is created from the **door**.

There should be a door in XPressEntry for **each** physical station that an employee will have a handheld.

Doors can also be added for each of the physical readers. If XPressEntry is set up to pull activities, it will move people in the system based on the reader they were scanned at and the zones attached to the door.

Configuring Readers

In XPressEntry's PremiSys integration, it is not necessary to associate any reader in the system with a handheld. This association can be done on the handheld when it comes time to scan.

A handheld unit can logically represent any reader in the building. When the handheld is issued to an employee at a specific door, the employee must first set the door on the handheld. The XPressEntry Reader that the handheld represents is based on whether the handheld is in entry mode or exit mode.

For example, let us say that you have handheld A stationed at door A. Door A has two readers associated with it: Reader A-Entry and Reader A-Exit. The employee holding the handheld sets the handheld's door to Reader A. When the employee sees a cardholder walking towards the building, he sets the handheld to Entry mode and scans the cardholder's badge. The handheld in entry mode identifies itself as reader A-Entry and sends an activity to the server.

Later, there is heavy volume exiting Door B. Door B has two readers associated with it: Reader B-Entry and Reader B-Exit. The employee from door A is called to help and brings handheld A. He sets the door on his handheld to Door B and the mode to Exit. When he begins scanning people walking out of the door, the handheld identifies itself as Reader B-Exit and sends each scan as an activity to the server.

Activities

XPressEntry will synchronize activities to PremiSys if that option has been set in the Data Manager.

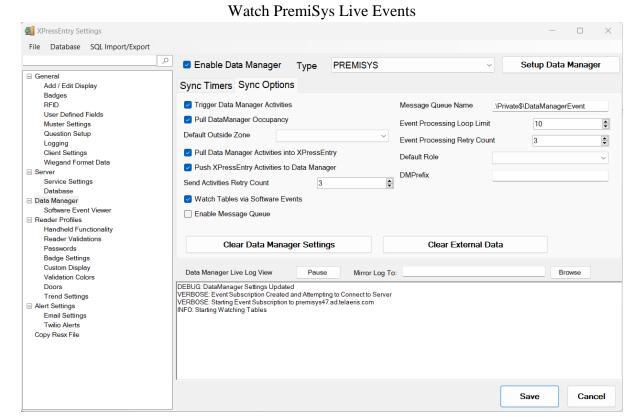
- 1. If XPressEntry is configured to "push" activities, they will appear in the **PremiSys Software**.
- 2. If XPressEntry is configured to "pull" activities, the **occupancy** of the system will **change** each time a person scans at a reader that is mapped to a door in **XPressEntry**.

You may want to pull activities if:

- 1. You want to use XPressEntry to manage Emergency Evacuations.
 - a. XPressEntry uses PremiSys activities to determine who is on and who is off campus.
 - b. In the case of a mustering event, XPressEntry will have an up-to-date list of who is on site on this day.
 - c. Using this list, XPressEntry can be utilized to "muster" or mark people as safe to create a list of people who are still on site.
- 2. You want to use XPressEntry's features to determine who is on site, and what areas people are in.

When PremiSys is configured to **Watch Table via Software Events** under Sync Options, the live events (card transactions) in PremiSys will be pulled in XPressEntry immediately.

Note: We cannot pull historical activities with PremiSys. The only activities that can be pulled are those that have happened within a minute.



For more information about the functionality of XPressEntry, please look at the XPressEntry manual.