

# ***XPRESSENTRY***

## **XPressEntry / ICT ProtegeGX Integration**

**Revision 03/20/2024**

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 an **ICT ProtegeGX** 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. ICT ProtegeGX version 4.3.285.21 or Higher
3. SOAP SDK
4. Windows Based OS

## Setting Up ProtegeGX to Synchronize with XPressEntry

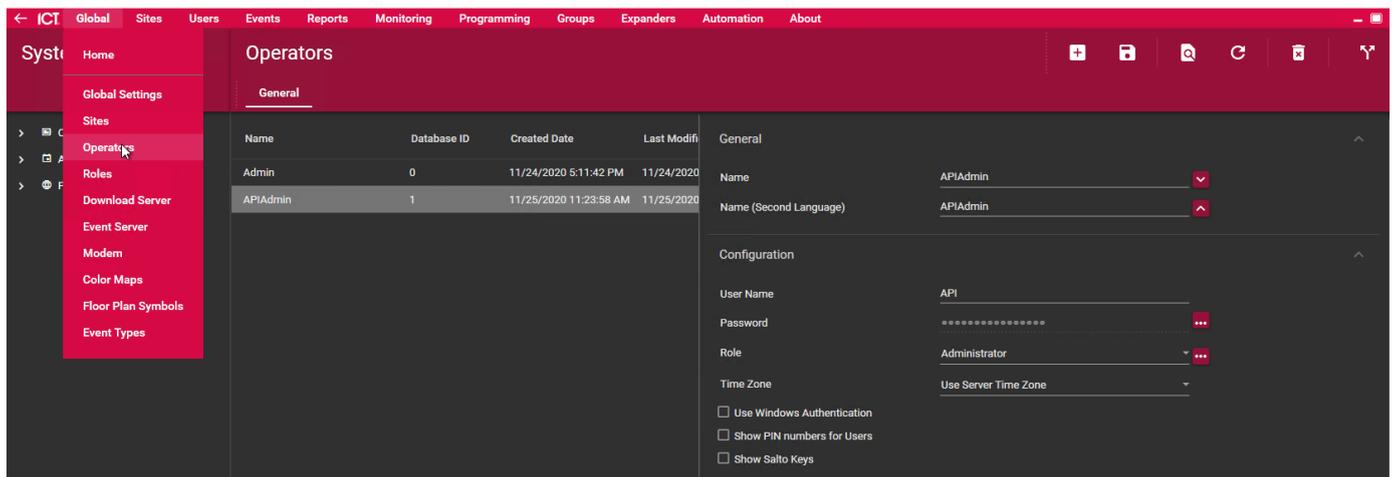
It is assumed that a version of ProtegeGX and XPressEntry are installed on computers or virtual machines that can talk to each other, or the same computer or virtual machine. To install XPressEntry, you should have Administrator privileges on its respective machine. You should additionally be an Administrator or super user in the ICT ProtegeGX System.

## Order of Operations

1. Setup XPressEntry Handhelds in ProtegeGX
2. Enable XPressEntry Synchronization
3. Set up XPressEntry Data

## Setup XPressEntry Handhelds in ProtegeGX

First, make sure that you have an **Operator** in ProtegeGX which has a role with access to all fields required by XPressEntry.



Normally the **administrator** role is used, but if the administrator role cannot be used, create a role that has a **Security Level**.

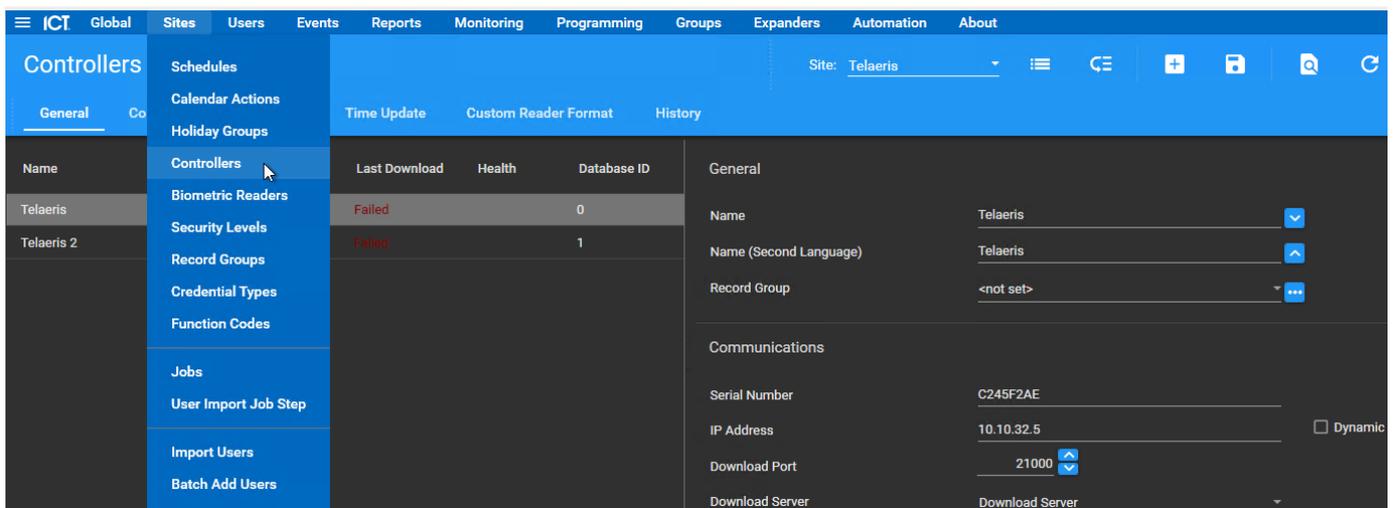
To create a custom role that has the proper access, navigate to **Global > Roles**. Then select the **Security Level Tab** and create a security level with the following access:

- **Access Levels**- Grant Read Only Access
- **Area Groups**- Grant Read Only Access
- **Areas**- Grant Read Only Access
- **Controllers**- Grant Read Only Access
- **Credential Types**- Grant Read Only Access

- **Custom Fields-** Grant Read Only Access
- **Door Groups-** Grant Read Only Access
- **Door Types-** Grant Read Only Access
- **Doors-** Grant Read Only Access
- **Muster Reports-** Grant Read Only Access
- **Phone Numbers-** Grant Read Only Access
- **PhotoID-** Grant Read Only Access
- **Record Groups-** Grant Read Only Access
- **Record History-** Grant Read Only Access
- **Schedules-** Grant Read Only Access
- **User Reports-** Grant Read Only Access
- **Users-** Grant Read Only Access

Once the Operator is created, create the **Readers** within **ICT** which will represent the **handhelds** in your **XPressEntry** system.

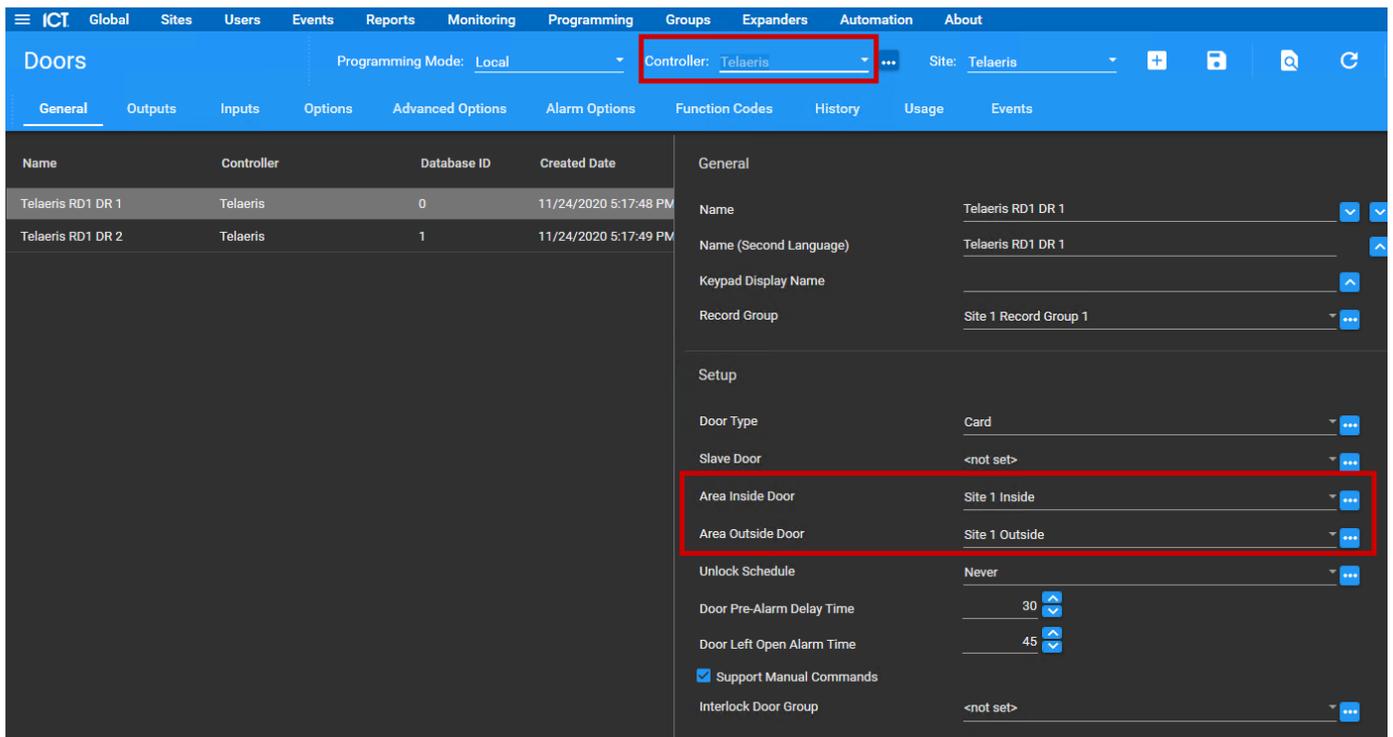
In ProtegeGX, before you can create a door, you must have a **Controller**. You can create a new controller in the system that will be used just for Telaeris Handhelds, or you can add handhelds to an existing Controller (**Sites > Controllers**).



Keep in mind, Telaeris handhelds are not connected directly to ProtegeGX Controllers. Telaeris Handhelds should be added as Protégé Doors, so as placeholders for the handhelds.

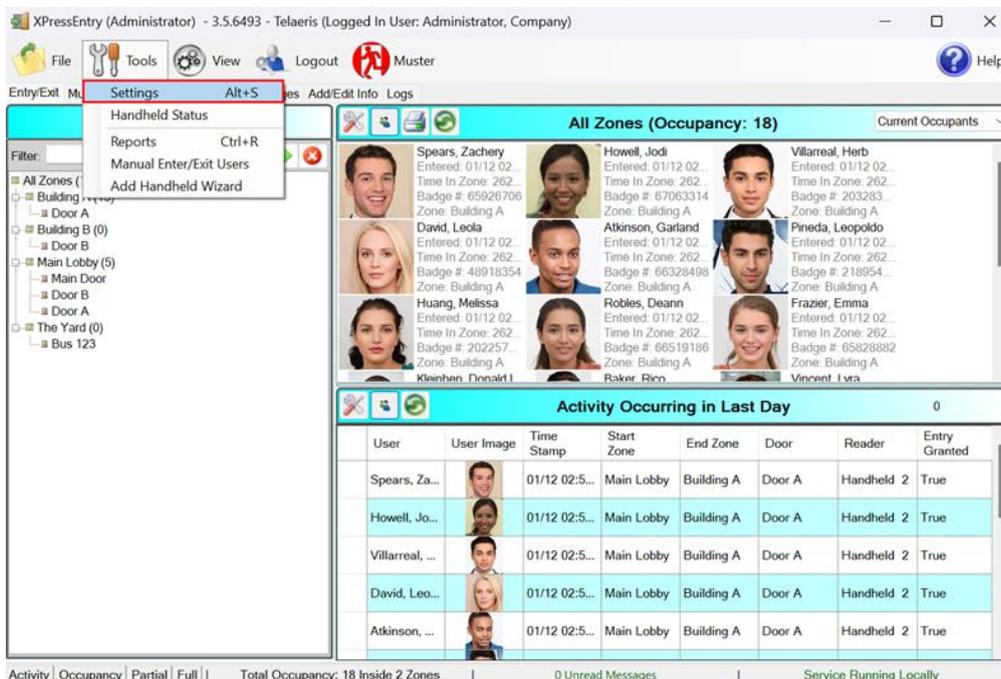
To add a handheld as a door in Protégé:

1. Navigate to **Programming > Doors**.
2. Select the controller at the top and select the **Area Inside Door** and **Area Outside Door** as shown below.



## Enable XPressEntry Synchronization

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

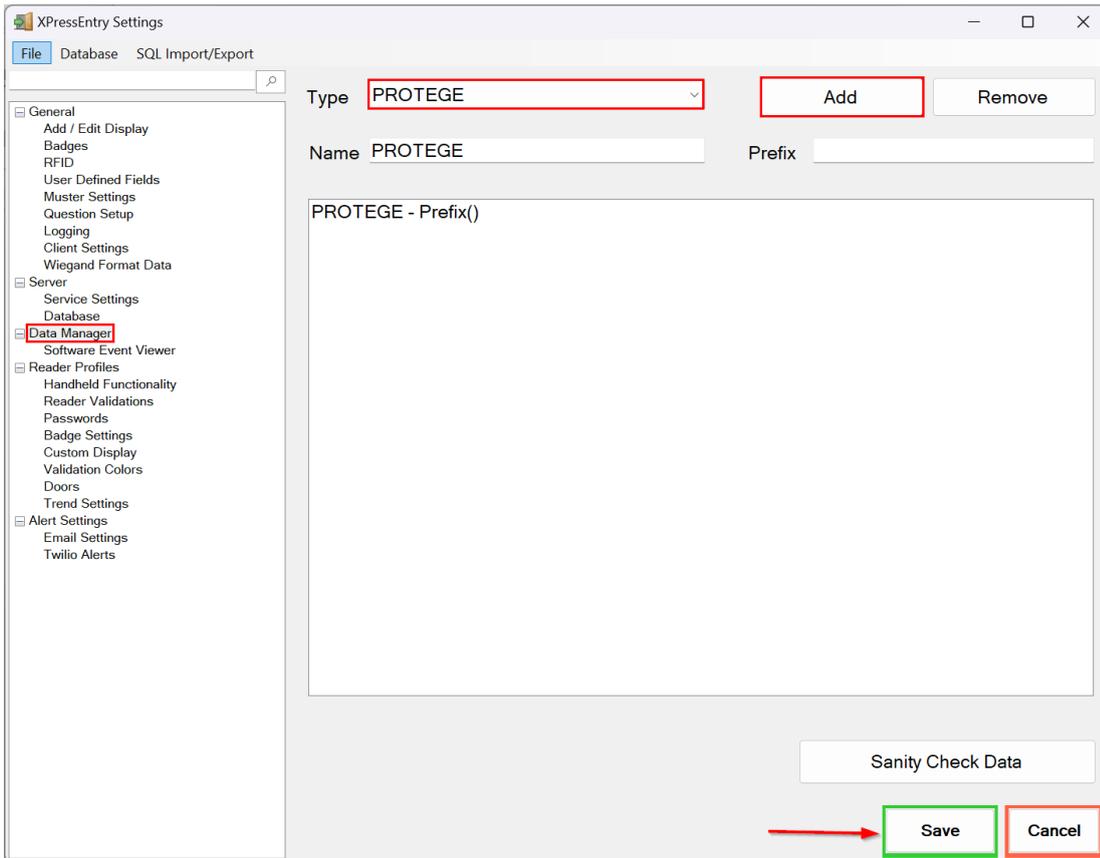


### Data Manager Tab

From the Settings page select the Data Manager Tab.

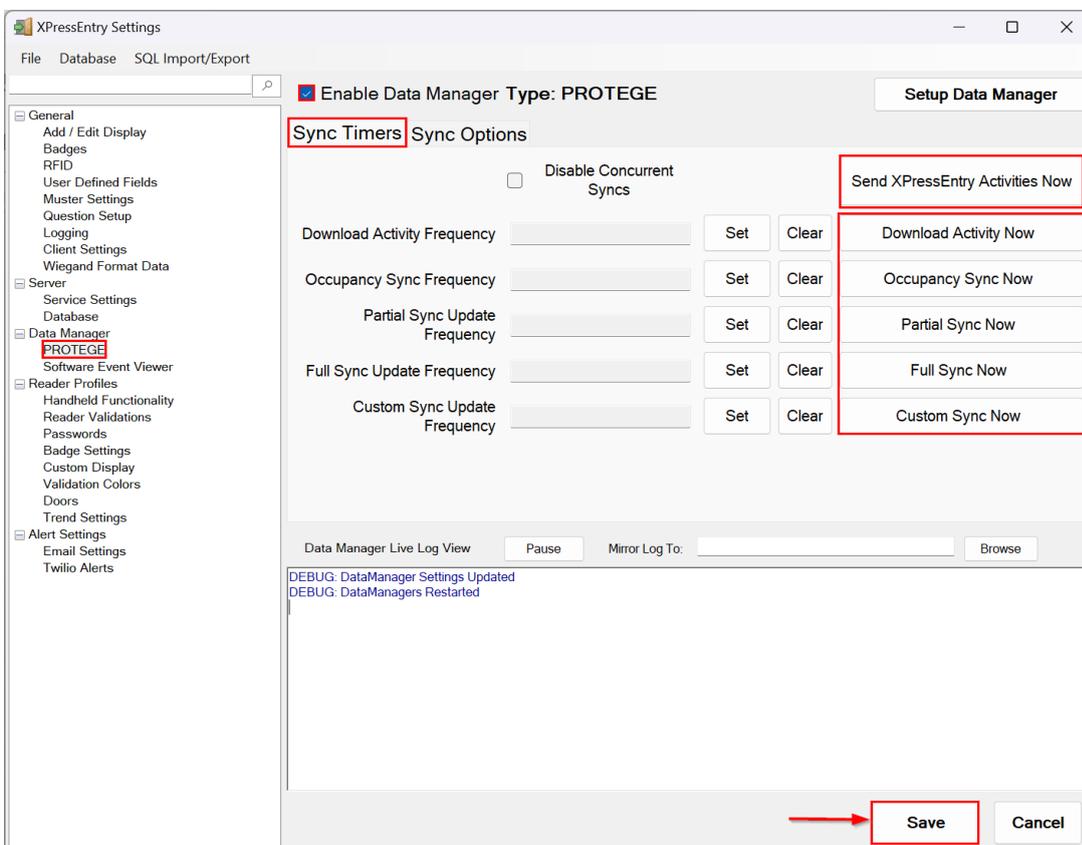
1. **Type** – This is the integration type. Select **PROTÉGÉ > Add > Save**.
2. Go to **Data Manager > PROTEGE** in sidebar menu.

3. **Setup Data Manager** – This sends you to the setup form for ProtegeGX’s data manager.



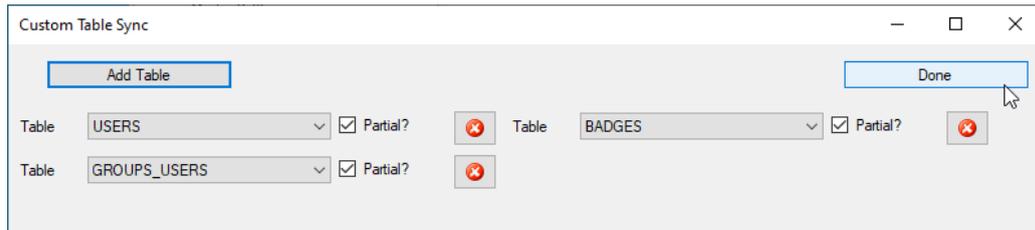
**Sync Timers**

XPressEntry uses Timers to pull ProtegeGX Data into XPressEntry.

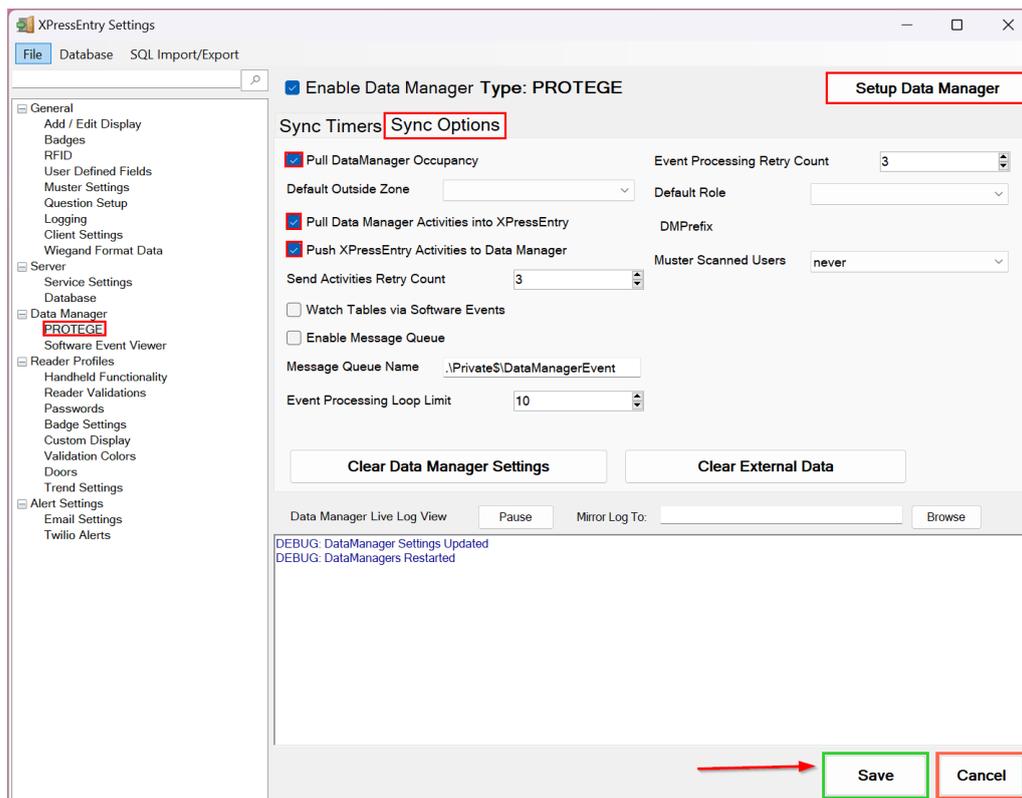


1. **Download Activity Frequency** – Pulls reader scan records into XPressEntry and stores them in XPressEntry’s activity table. This function also updates the zone occupancy.
2. **Occupancy Sync Frequency** – Updates the zone occupancy without storing the activity records.

3. **Partial Sync Frequency** – Pulls all data excluding cardholder data, including readers, areas, access levels.
4. **Full Sync Update Frequency** – Updates all tables by pulling all necessary records from ProtegeGX. 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**. Not currently available with ProtegeGX integration.



## 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 ProtegeGX.
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 ProtegeGX specific settings.

8. **Clear DataManager Settings** – Resets all settings on the two above tabs, as well as the ProtegeGX specific settings.
9. **Clear External Data** – Deletes all data synced from ProtegeGX from the XPressEntry Database.

### ProtegeGX Data Manager Setup Page

Press the **Setup Data Manager** button to get the ProtegeGX specific setup screen. In the new window, you will see the following window. Set the following settings for your installation.

- **Remote Address** – The address of your Protégé installation
- **Port** – The SOAP Port
- **Path** – The SOAP API Route
- **Use Https** – Check if https is set up on the SOAP SDK with a valid certificate
- **User Name** – Operator User Name that XPressEntry will use to pull data from Protégé. This user should have admin access in Protégé.
- **Password** – Password for Operator
- **Encrypt Password** – Check this if SOAP API requires an encrypted password
- **Escape Special Characters in Activities** – Default to checking this. This may fix special characters if they are present in names
- **Debug Print XML** – Provides extra debug information in the sync log. Only keep this on while testing

The screenshot shows the 'Protege ICT Data Manager' configuration window. The interface is divided into two main columns. The left column contains configuration fields: 'Remote Address' (10.10.6.151), 'Port' (8030), 'Path' (ProtegeGXSoapService), 'User Name' (API), and 'Password' (\*\*\*). Below these are checkboxes for 'Use Https', 'EncryptPassword', 'Escape Special Characters In Activities' (checked), and 'Debug Print XML'. A 'Reload' button is positioned next to the 'Errors' field. The right column features a 'Sites' section with a dropdown for 'ID' (1) and checkboxes for 'Telaeris' (checked) and 'Telaeris Site 2'. Below this are sections for 'Record Group' (ID), 'Credential Types' (ID), and 'Report IDs (Ex. ReportID:SiteID,ReportID:SiteID)' (3:1). A 'Save And Close' button is located at the bottom right of the window.

### Set Up XPressEntry Data

After setting up the data manager, run the initial **Full Sync** to pull data from ICT ProtegeGX. Once the ProtegeGX 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 ProtegeGX **cannot be changed** and is greyed out in XPressEntry without proper permissions.

## Users

Here is a sample of a properly synchronized user:

The screenshot shows the XPressEntry software interface. The window title is 'XPressEntry - 3.5.6564 - Telaeris (Logged In User: Administrator, Company)'. The interface includes a menu bar with options like File, Tools, View, Logout, Entry/Exit, and Help. Below the menu bar is a navigation pane with tabs for Users, Companies, Groups, Zones, Doors, Readers, Roles, Timezones, and Muster Sites. The 'Users' tab is active, showing a list of users on the left and a detailed user profile on the right. The user profile is for 'Tilly Bright' and includes fields for First Name, Last Name, MI, Company, Emp ID, Zone, Role, Start Date, and End Date. A photo of the user is displayed next to the profile. Below the profile is a 'Badges' section with a table showing one badge with ID 100, activated on 10/4/2023. The interface also includes buttons for 'Add New', 'Delete', 'Save', and 'Cancel'.

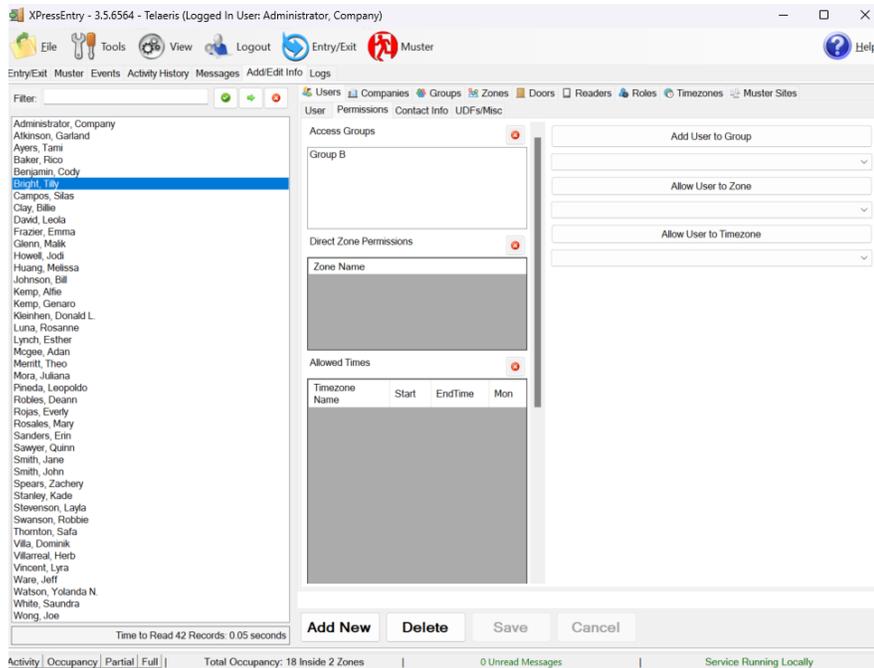
Badge	Activated Date	Expired Date	Invalid	Badge Type
100	10/4/2023			

All External Records (From ProtegeGX) will display in red as an **External Record** at the top of the form. This label will not display for any records that were created from within XPressEntry.

XPressEntry will pull the user's **image** and **badge number** from ProtegeGX. The badge number can be seen at the bottom of the screen.

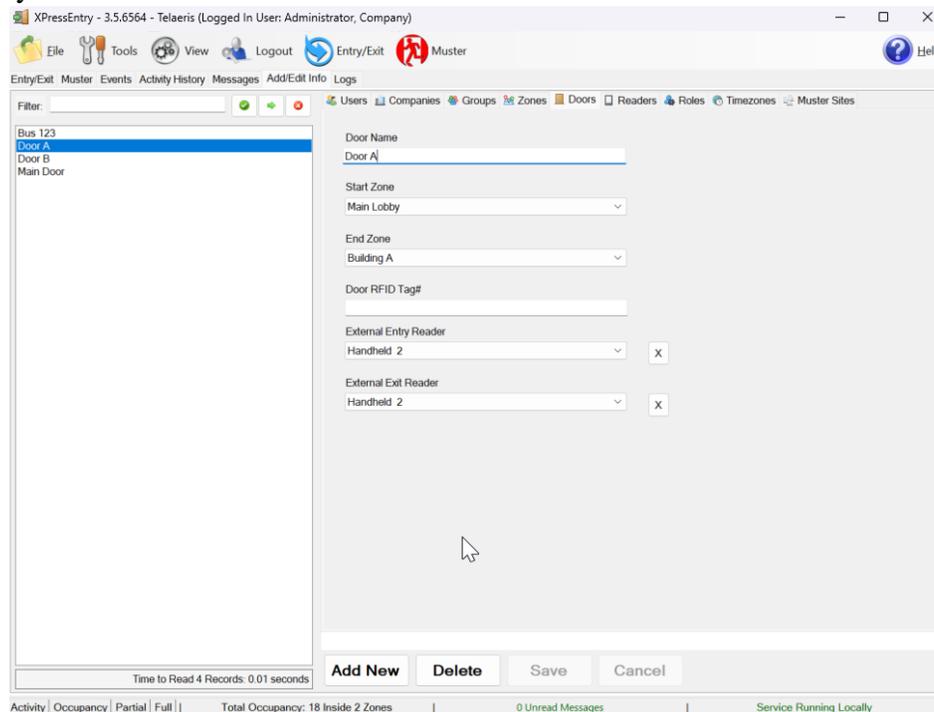
## User Permissions

Users in XPressEntry have the **same permissions** to each reader as they do in ProtegeGX. This is regardless of whether the user is assigned an Access Code, Reader Group, or direct access to a Reader.



## Doors

**Entry/Exit** permissions in XPressEntry are set by doors. Doors contain **two readers** – an exit and an entry **reader**.



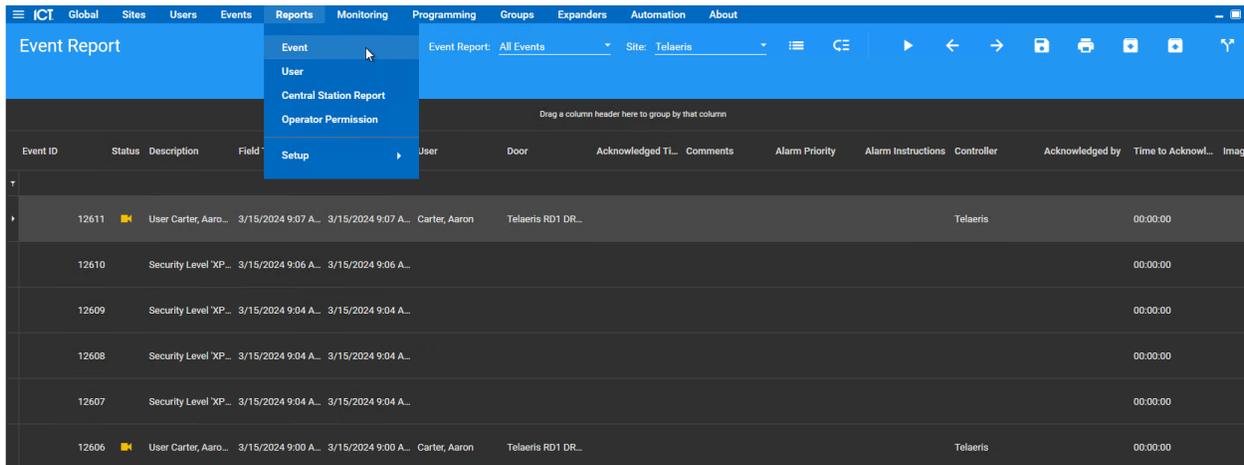
**Door access** is determined by the user's access to the door's reader. For **entry**, permission is based on the user's access to the door's **external entry reader**. For **exit**, permission is based on the user's access to the door's **external exit reader**. Doors may need to be set by the user for each Handheld Reader in XPressEntry.

For each door, the **start** and **end** zone should be set based on the door configured within ProtegeGX. If no areas are set within Protégé, set the start zone and end zone in XPressEntry. This only needs to be done one time.

## Activities

XPressEntry will synchronize activities to ICT ProtegeGX if that option has been set by the Data Manager. Entry/Exit activities will be sent to ProtegeGX and display the results in the Transaction logs.

To View these logs, navigate to **Reports > Event** within ProtegeGX.



The screenshot shows the 'Event Report' interface in ProtegeGX. The top navigation bar includes 'ICT', 'Global', 'Sites', 'Users', 'Events', 'Reports', 'Monitoring', 'Programming', 'Groups', 'Expanders', 'Automation', and 'About'. The 'Reports' menu is open, showing options for 'Event', 'User', 'Central Station Report', 'Operator Permission', and 'Setup'. The 'Event' option is selected, and the main area displays a table of events. The table has columns for Event ID, Status, Description, Field, User, Door, Acknowledged Time, Comments, Alarm Priority, Alarm Instructions, Controller, Acknowledged by, and Time to Acknowledge. The table contains several rows of event data, including user activities and security level changes.

Event ID	Status	Description	Field	User	Door	Acknowledged Time	Comments	Alarm Priority	Alarm Instructions	Controller	Acknowledged by	Time to Acknowledge	Image
12611	🟡	User Carter, Aaro...	3/15/2024 9:07 A...	3/15/2024 9:07 A...	Carter, Aaron	Telaeris RD1 DR...				Telaeris		00:00:00	
12610		Security Level XP...	3/15/2024 9:06 A...	3/15/2024 9:06 A...								00:00:00	
12609		Security Level XP...	3/15/2024 9:04 A...	3/15/2024 9:04 A...								00:00:00	
12608		Security Level XP...	3/15/2024 9:04 A...	3/15/2024 9:04 A...								00:00:00	
12607		Security Level XP...	3/15/2024 9:04 A...	3/15/2024 9:04 A...								00:00:00	
12606	🟡	User Carter, Aaro...	3/15/2024 9:00 A...	3/15/2024 9:00 A...	Carter, Aaron	Telaeris RD1 DR...				Telaeris		00:00:00	