

# **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 <u>https://telaeris.com/documentation</u>.

### 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.

← ICT	Global Sites Us	ers	Events Reports Mon	itoring Program	iming Groups Ex	panders .	Automation About					🗆
Syste	Home		Operators					+	Q	G	×	٣
	Global Settings		General									
> 🖬 (	Sites											
	Operators		Name	Database ID	Created Date	Last Modifi	General					
í dí	Roles		Admin		11/24/2020 5:11:42 PM	11/24/2020	Name	APIAdmin				
1	Download Server		APIAdmin		11/25/2020 11:23:58 AM	11/25/2020	Name (Second Language)	APIAdmin				
	Event Server											
	Modem						Configuration					
	Color Maps							10				
	Floor Plan Symbols						User Name	API				
	Event Types						Password		•••			
							Role	Administrator	<u> </u>			
							Time Zone	Use Server Time Zone				
							Use Windows Authentication					
							Show PIN numbers for Users					
							Show Salto Keys					

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**).

≡ ICT Glo	obal	Sites	Users	Even	ts Reports	Monitoring	Programming	Groups	Expanders	Automation	About					
Controll	ers	Schedu	les						Site:	Telaeris		:=	ςΞ	÷	Q	C
General	Со	Calenda Holiday	ar Actions Groups		Time Update	Custom Re	ader Format H	History								
Name		Control	lers		Last Download	l Health	Database ID	Ger	neral							
Telaeris		Biomet	ric Readers		Failed		0	Nan	ne		Telaer	ris				
Telaeris 2		Security Record	y Levels Groups					Nan	ne (Second Langu	age)	Telaer	ris			_	
		Creden	tial Types					Rec	ord Group		<not s<="" th=""><th>set&gt;</th><th></th><th></th><th>- <u></u></th><th></th></not>	set>			- <u></u>	
		Functio	n Codes													
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		User Im	port Job S	tep				Seri	al Number		C245	F2AE				
								IP A	ddress		10.10	.32.5			_ 0'	Dynamic
		Import	Users					Dow	vnload Port			21000				
		Datch A	dd Users					Dow	vnload Server		Down	load Serv	er			

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.

$\equiv$ <b>ICT</b> Global Sites	Users Events Reports	Monitoring Programming	Groups Expanders Automation	About
Doors	Programming Mo	ode: <u>Local</u> Co	ntroller: <u>Telaeris</u> ••• Site	: <u>Telaeris</u> + D Q C
General Outputs	Inputs Options Advance	ed Options Alarm Options	Function Codes History Usage	Events
Name	Controller Data	abase ID Created Date	General	
Telaeris RD1 DR 1	Telaeris 0	11/24/2020 5:17:48 F	<sup>M</sup> Name	Telaeris RD1 DR 1
Telaeris RD1 DR 2	Telaeris 1	11/24/2020 5:17:49 F	M Name (Second Language)	Telaeris RD1 DR 1
			Keypad Display Name	
			Record Group	Site 1 Record Group 1
			Setup	
			Door Type	Card Ten
			Slave Door	<not set=""></not>
			Area Inside Door	Site 1 Inside
			Area Outside Door	Site 1 Outside 💦 📷
			Unlock Schedule	Never 🛛 🔤
			Door Pre-Alarm Delay Time	
			Door Left Open Alarm Time	45 🙅
			Support Manual Commands	
			Interlock Door Group	<not set=""></not>

## 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.

MPressEntry Settings				- 0	×
File Database SQL Import/Export					
General Add / Edit Display Badges RFID	Type PROTEGE ···································	Prefix	Add	Remove	
User Defined Fields Muster Settings Question Setup Logging Client Settings Wiegand Format Data Server Service Settings Database Data Manager Software Event Viewer Reader Profiles Handheld Functionality Reader Validations Passwords Badge Settings Custom Display Validation Colors Doors Trend Settings Email Settings Twilio Alerts	PROTEGE - Prefix()				
			Sanity Cl	neck Data	
			Sa	ve Can	cel

#### Sync Timers

#### XPressEntry uses Timers to pull ProtegeGX Data into XPressEntry.

🛃 XPressEntry Settings					- 🗆 X
File Database SQL Import/Export					
[	🔎 🔽 Enable Data Manager	Type: PROTEG	iΕ		Setup Data Manager
General Add / Edit Display Badges	Sync Timers Sync Optio	ns			
RFID User Defined Fields Muster Settings		Disable Concu Syncs	irrent		Send XPressEntry Activities Now
Question Setup Logging Client Settings	Download Activity Frequency		Set	Clear	Download Activity Now
Server	Occupancy Sync Frequency		Set	Clear	Occupancy Sync Now
Data Manager	Partial Sync Update Frequency		Set	Clear	Partial Sync Now
Software Event Viewer Software Event Viewer Reader Profiles Handheld Functionality Reader Validations Passwords	Full Sync Update Frequency		Set	Clear	Full Sync Now
	Custom Sync Update Frequency		Set Clear		Custom Sync Now
Badge Settings Custom Display Validation Colors Doors Trend Settings					
Alert Settings Email Settings Twile Alerts	Data Manager Live Log View	Pause Mirror	Log To:		Browse
TWING AIGUS	DEBUG: DataManager Settings Update DEBUG: DataManagers Restarted	d			
					Save Cancel

- 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.

Custom	Table Sync				-		×
	Add Table					Done	2
Table	USERS	✓ ✓ Partial?	😮 Ta	able BADGES	✓ ✓ Partial?	0	
Table	GROUPS_USERS	✓ ✓ Partial?	3				

#### Sync Options

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2 APressEntry Settings				- U	~							
File Database SQL Import/Export												
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General			· · · ·		•							
Add / Edit Display	Sync Timers Sync Options											
Badges					121							
RFID User Defined Fields	Pull DataManager Occupancy	Event Processing Retry Cou	nt 3		Ŧ							
Muster Settings	Default Outside Zone	Default Role			~							
Question Setup												
Logging Client Settings Wiegand Format Data	Pull Data Manager Activities into XPressEntry	DMPrefix										
	Push XPressEntry Activities to Data Manager											
Server	Sand Astivitian Date: Count	never		~								
Service Settings Database												
Data Manager	Watch Tables via Software Events											
PROTEGE	Enable Message Queue											
Software Event Viewer												
Handheld Functionality	Message Queue Name\Private\$\DataManagerEvent											
Reader Validations	Event Processing Loop Limit 10											
Passwords Radao Sattingo												
Custom Display												
Validation Colors	Clear Data Manager Settings	ita										
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	DEBUG: DataManagers Restarted											
				_								
			Save	Ca	ncel							

- 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

Protege ICT Data Manager				- 🗆 X
Remote Address	10.10.6.151		Sites	ID 1
Port	8030		✓ Telaeris	
Path	ProtegeGXSoap	Service		
Use Https			Record Group	ID
User Name	API			
Password	***			
EncryptPassword			Credential Types	ID
Escape Special C	haracters In Activi	ies		
Debug Print XML				
Errors		Reload		
		<u>^</u>	Report IDs (Ex. Re	portID:SiteID,ReportID:SiteID)
		¥	3:1	
				Save And Close

## 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:

Filte:   Image: Comparing & Groups Mit Zones   Doors   Readers	Le Muster Sites
User   Permissions   Contact Info   UDFINEsc     Whinson, Garland   Awyers, Tami   Bight   Image: Contact Info	
Addressitator, Company     Adversitator, Company     Avers, Tami     Salex, Rico     Bangamin, Cody     Company     Tily   Bright     Company     Tily   Bright     Company   Image: Company     Company   Image: Company     State, Rico   Visitor     Dand, Loala   Image: Company     Tarzet, Emma   Image: Company     State, Rico   Image: Company     Company   Image: Company     Image: Company   Image: Company     Company   Image: Company     Image: Company	
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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.

Entry/Exit Muster Events Activ	ity History Messages Add/Edit In	lo Logs						
Filter		🍇 Users 🔟 Com	panies 👋 Groups	🕍 Zones 📃	Doors 🗌 Reade	rs 👍 Roles 💿 Timezones 🐏 M	uster Sites	
		User Permission	ns Contact Info UD	Fs/Misc				
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Avers. Tami		-				Add Oser to Group		
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Benjamin, Cody								
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Campos, Silas								
Clay, Billie								~
David, Leola								
Frazier, Emma		Direct Zone Dam				Allow User to Timezor	ne	
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Huang, Melissa		Zone Name						
Johnson, Bill								
Kemp Genaro								
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Vincent, Lyra								
Ware, Jeff								
Watson, Yolanda N.								
White, Saundra								
Wong, Joe								
		Add New	Delete	Save	Cano	e		

#### Doors

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

XPressEntry - 3.5.6564 - Telaeris (Logged In User: Adm	nistrator, Company) —	
🔨 Eile 🙌 Tools 🛞 View 📣 Logout	S Entry/Exit 🚯 Muster	Pelp
Entry/Exit Muster Events Activity History Messages Add/Edit	nfo Logs	
Filter:	🍇 Users 🔝 Companies 🏶 Groups 🤮 Zones 📕 Doors 🔲 Readers 🎄 Roles 🗞 Timezones 🐏 Muster Sites	
Bus 123 Door A	Door Name	
Door B Main Door	Door A	
	Start Zone	
	Main Lobby V	
	End Zone	
	Building A V	
	Door RFID Tag#	
	Evternal Entry Reader	
	Handheld 2 × x	
	External Exit Reader	
Time to Dood 4 Decords: 0.01 cocords	Add New Delete Save Cancel	
Time to Head 4 Hecords: 0.01 seconds		

Activity Occupancy Partial Full Total Occupancy: 18 Inside 2 Zones | OUrread Messages | Service Purning Locally **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.

≡ **ICT** Global Events Reports ē. • ort: All Events Heer Central Station Report Drag a column header here to group by that c **Operator Permission** Event ID Field Setur User Carter, Aaro... 3/15/2024 9:07 A... 3/15/2024 9:07 A... Carter, Aaron Telaeris RD1 DR. Telaeris 00:00:00 12611 00:00:00 12610 00:00:00 12600 12608 00:00:00 Security Level 'XP... 3/15/2024 9:04 A... 3/15/2024 9:04 A... 12607 User Carter, Aaro... 3/15/2024 9:00 A... 3/15/2024 9:00 A... Carter, Aaron Telaeris RD1 DR. Telaeris 00:00:00 12606 🔜

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