SAVANCE WORKPLACE

PDK 1.0 Integration Setup

A Guide to Setting up a PDK & Savance Workplace Integration

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Introduction

Savance Workplace is a simple, easy-to-use, and fully customizable electronic in out board software solution. Among its many features, it has the ability to print labels directly onto security badges.

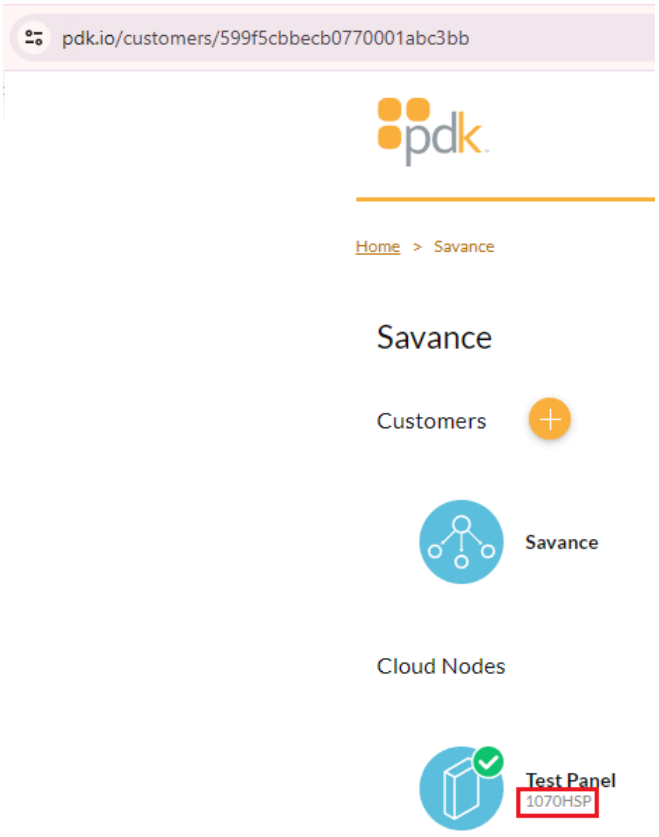
Savance Workplace has multiple interfaces, or apps, for accessing your data. For the purposes of integrating with PDK and printing badges, we will use Savance Workplace's website to sync people out of PDK and into Savance Workplace, and then we'll use Savance Workplace's desktop app to print badges.

Note: In PDK, people have profiles which assign physical access rights. They become Savance Workplace users with no additional privileges until privileges are granted through Savance Workplace Security Group options. To reduce any confusion, understand that not all Savance Workplace users will be able to log into Savance Workplace until provided with a username and password. For badge printing purposes, only administrators who print badges have an Savance Workplace account or the ability to log in.

Prerequisites

- **Panel ID**

  Panel ID's can be found in the https://pdk.io below the panel's name under the **Cloud Nodes** section. They can be listed in Savance as a comma separated list.

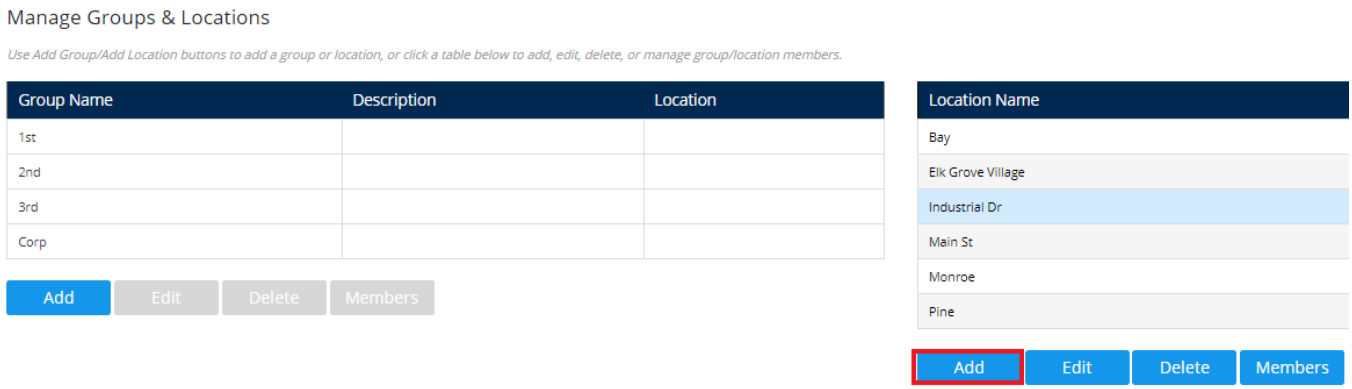


Savance Workplace Setup

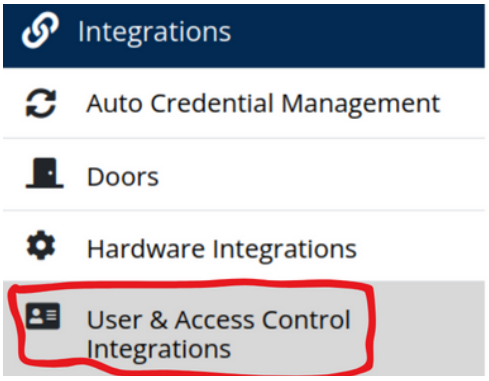
Savance Workplace Web Application

1. Our first stop is the Administrative Panel to start assembling the components.
2. Cloud customers can access the Administrative Panel from https://cloud.savaceworkplace.com. On-premise customers will have a separate web address.
3. Log into Savance Workplace with an Administrative account
    a. Navigate to the Administration tab
    b. Under the 'Users, Groups, & Security' section, click on 'Groups & Locations'

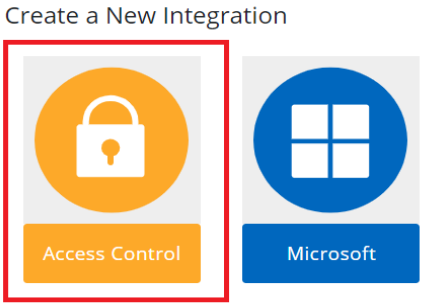
On the right-hand side, click “Add” to create a new Location name. This Location could represent your Main Entrance, a Satellite Location, or some other naming convention specific to your organization.



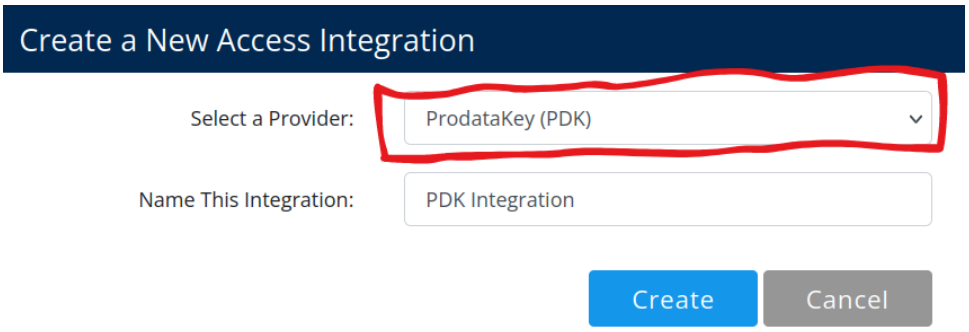
4. The Administrative Menu sits on the left-hand column, expanding the Integration option.
    a. Click on the “User & Access Control Integrations” option



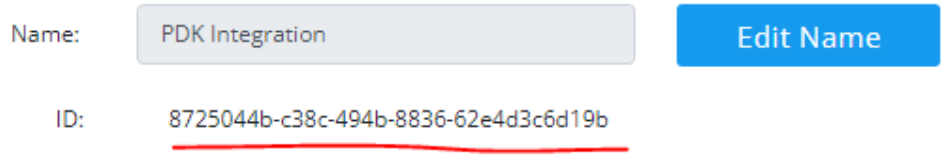
    b. From this page click “Access Control” under “Create New Integration”



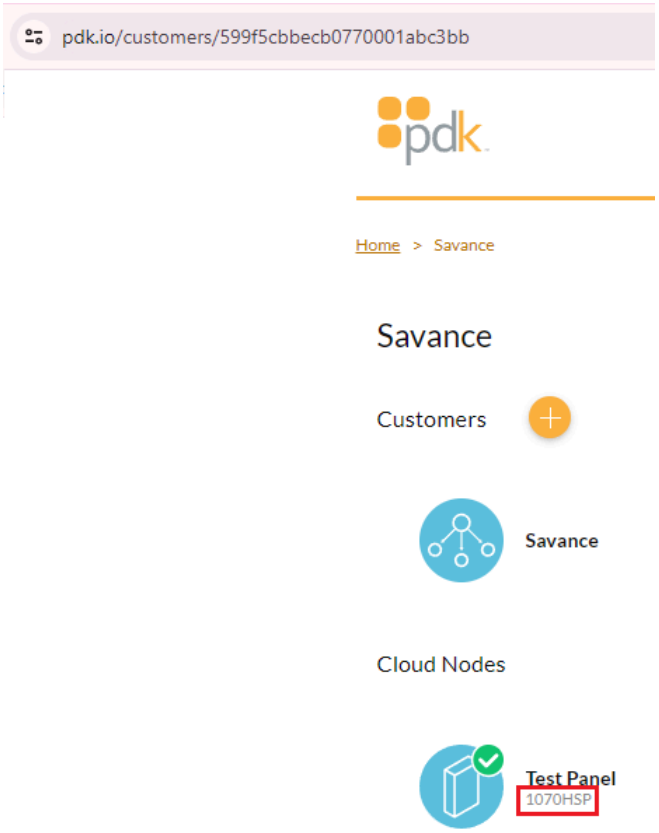
5. Select “**Prodata Key (PDK)**” as your Provider
    a. Name the Integration something unique now or edit this name later.



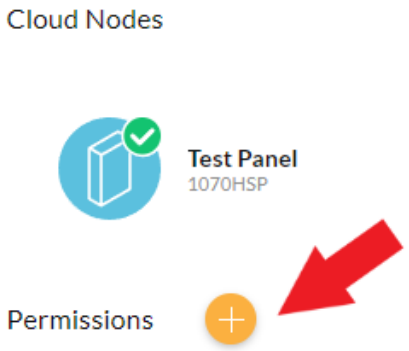
Your new integration has now been created. You'll notice the integration's ID is located just beneath its name. Save this ID for later. This is the ID that you'll use to configure the connector.



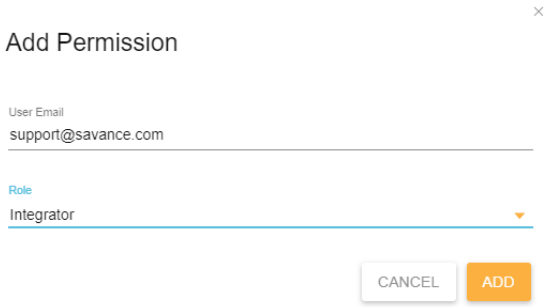
b. Make sure all required fields are met before Saving your Settings.
   i. Note: Panel ID's can be found in the https://pdk.io menu under the panel's name. They can be listed in Savance as a comma separated list.



c. locate the permissions area then click on the plus icon to create a new permission.



d. Enter support@savance.com as the email and select “Integrator” as the role, exactly as shown below.

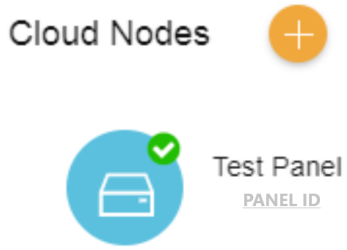


e. Navigate back to your Savance Workplace integration configuration panel
f. Under “Default Door Status,” select a purposeful status based on how you are using the door
g. Optionally, select the “Default Door Location” we created earlier
h. Verify the “Time Zone” of PDK Panel
i. Click "Save Settings"
j. Click "Test API Call"
k. This test should return positive results, if not, contact your IT administrator or Savance Support.
l. If you’re ready to sync your People from PDK to the Savance Workplace, navigate to the “Syncing Users from PDK to Savance Workplace” section.

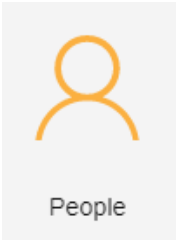
Creating a Person in PDK

Once logged into your PDK.io account, navigate to the panel where you intend to add people.

For example:

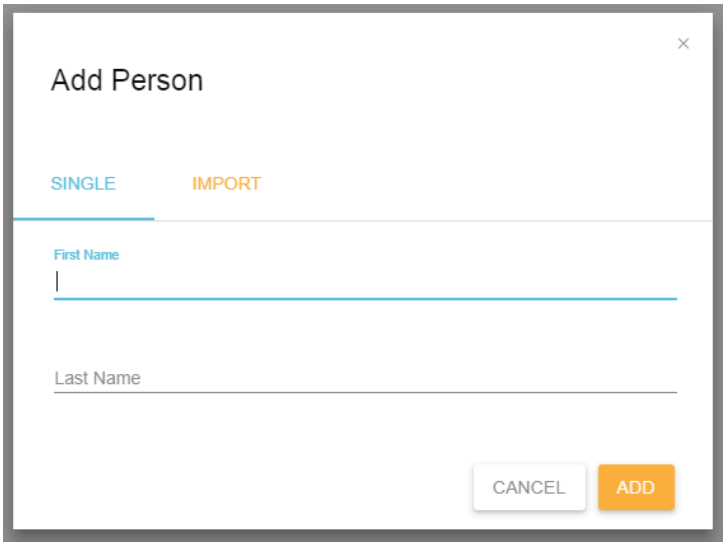


Then go into People:



And click the + in the lower right corner:

PDK provides two ways to add people: One-at-a-Time, or Bulk Import:



If you wish to import people in bulk, follow the instructions provided by PDK. Once people have been added to PDK, we are ready to sync them into Savance Workplace.

NOTE: Do not assign badges to people yet. This will be done at a later step.

Configuring the Integration

Under the Integration Settings header, you'll notice all the settings you can configure:

Note Hereafter **Savance Workplace** term is referred as **Workplace**

Integration ID:
The integration ID is automatically generated. You will need this GUID for the Connector.

Integration Enabled:
If this is set to **No**, the connector and integration will not be active.

Sync Events:
Would you like events to be synced, such as a user swiping a card?

Sync Users on Event Activity:
When the connector is running, and a cardholder without an Workplace account swipes a card, Workplace will try to create a profile for the user in Workplace automatically. If this setting is set to **No**, Workplace will ignore these inputs.

Disable Workplace Users On Disable or Deletion in PDK:
If this option is set to **Yes**, cardholders in the workplace will automatically get disabled when they are disabled or deleted in the PDK system.

Sync Door on Event Activity:
When the connector is running, and an access event occurs on a card reader that has not been synced with the workplace yet, Workplace will try to add the reader as a Door in the workplace automatically. If this setting is set to **No**, Workplace will ignore these inputs.

Sync User Photos:
If this option is set to **Yes**, cardholders with a picture will have their photo imported into Workplace, where it can be displayed on status boards and in the web client.

API Version:
Currently we are supporting **1.0** and **2.0** versions of PDK API, you can select any one of these versions that support your environment.

Opt In To WebHooks:

If this option is set to **Yes**, you are able to create/update a subscription for receiving WebHook events such as door events, user sync events, door sync events from the PDK system .

Polling Only:

If this option is set to **Yes**, instead of card swipes and other events instantly being sent to the Workplace, the connector will check with the PDK system every so often to see if any new events have occurred. You can set this time interval using the setting Polling Interval.

Event Subscription URI:

Leave this blank, the connector will use the default URI for the Savance Workplace Web Server.

Panel IDs:

Panel ID is required for making API calls to the PDK system.

User Groups Sync White List, User Groups Sync Black List:

These are a CSV (comma-separated values) list of user groups Access Codes in Symmetry through which you can select certain groups of people to be synced or ignored.
White List: Only people who **do have** an access code listed here will be synced.
Black List: Only people who **do not have** an access code listed here will be synced.

-Note: Only the white list or the black list can be used at one time.

Default Door Status:

When a new card reader is synced through the integration, this is the status that it will assign people in the Workplace. You can always change the status that readers assign people through the **Doors** menu in the Admin page.

Default Door Location:

When a new card reader is synced through the integration, this is the location that it will be marked as located in the Workplace. You can always change the location of the reader through the **Doors** menu in the Admin page.

Default User Password:

When a cardholder is synced into the Workplace, they are assigned a username and password for login into the Workplace. This is the default password that any synced users are assigned. A user's password can be changed from the default at any time by right-clicking on a user, selecting **Administer User**, and then typing a new password in the password and confirm password box.

Sync User Interval:

If greater than 0, the time between each UserSync that the connector executes to check for new PDK persons.

Sync Door Interval:

If greater than 0, the time between each DoorSync that the connector executes to check for new PDK readers.
Note: Sync Doors on Event Activity means when an event is received by the Connector service, the system will create a new door if it doesn't recognize the door sent with the event.
If it's greater than 0, Sync Door Interval will sync all doors every X number of minutes.
If you want to disable automatic door sync, Sync Doors On Event would be set to off, and Sync Door Interval must be 0.

Panel Time Zone:

The time zone of the location where the PDK readers are installed.

Polling Interval:

How often the Connector will request new access events from the integration?

Enable Random Credential Generation:

If this option is set to **Yes**, then the Workplace will generate credential numbers in random manner with the default credential type and default credential format.

Random Credential Range Minimum:

The minimum range is used to create random credential numbers.

Random Credential Range Maximum:

The maximum range is used to create random credential numbers.

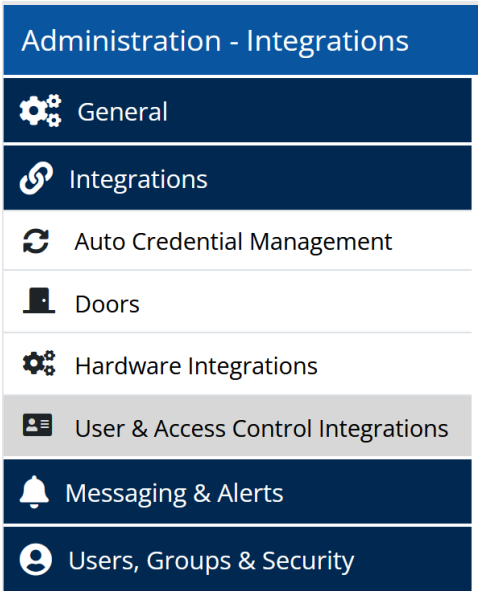
After you select and input all of the settings that you need, make sure to click **Save Settings**. If you forgot to input a required value, make sure you fix that.

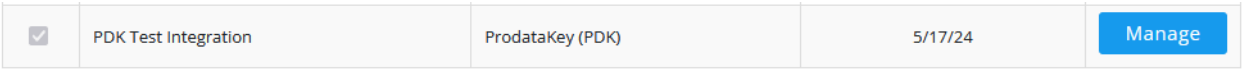
Before you proceed with the integration, make sure that you're connected to PDK by clicking the "Test API Call" button

Syncing Users From PDK to Savance Workplace

Now that you have created your people in PDK, the next step is to transfer them into Savance Workplace.

1. Log into Savance Workplace with an Administrative account
2. Navigate to the Administration tab
3. At the top left, of the board, click on the Integration option
4. Select "User & Access Control Integrations"
5. On this page you will see the PDK integration that was previously created:

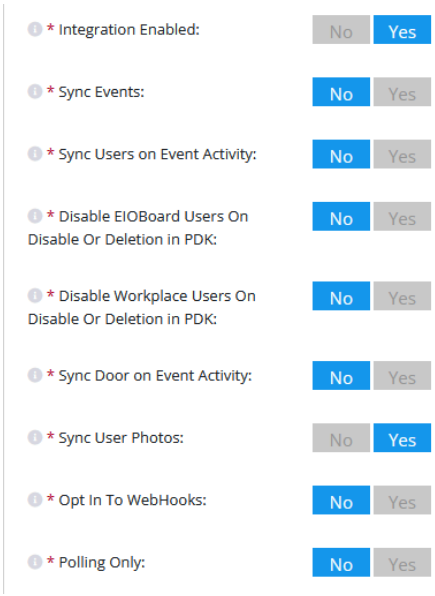




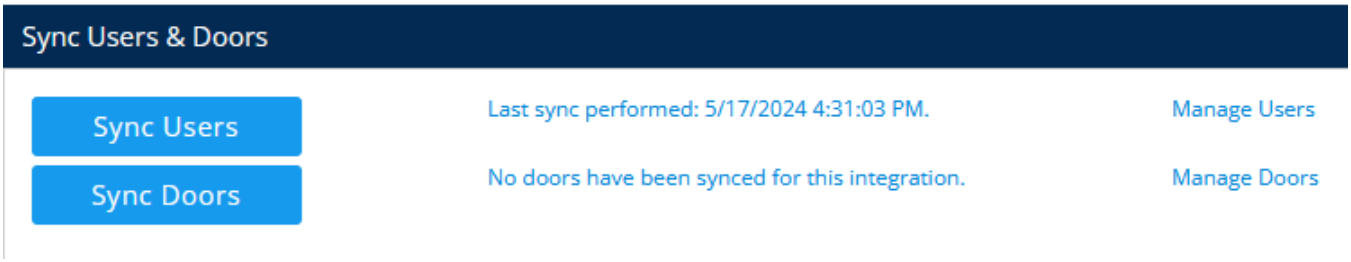
Clicking on the "Manage" button will bring you into the details of the integration.

The first settings that you'll want to configure is a series of toggle switches.

Hover over the symbol by each of them for a brief explanation of what they do.
Your configuration of these settings will depend on your use case for the integration.
If you have any questions about what you should enable, contact Savance support.



To sync users, scroll down to “Sync Users & Doors” section:



If you’re using the integration for staff tracking and event syncing, then you can sync doors in this section as well.

1. Click on “Sync Users”
2. Follow steps 1 through 4 to syncing your People from PDK
3. On step 3 you’ll select users that you’d like to sync from PDK to Savance Workplace. There are a few filters that you can select for this sync:
    a. “Show New” – PDK Users not synced into Savance Workplace
    b. “Show Existing” – PDK Users already synced into Savance Workplace. Select this option if you intend to sync newly added photos stored in PDK.
    c. “Show All” – Displays all users in PDK
4. Depending on how many people are in PDK, this may require multiple batches to complete. Each batch requires your input before starting the next batch.

Once it is complete, a message will appear with details of the sync. If an error occurs durin your sync, try again, and if it persists contact support for assistance.

When your sync completes, you can return to the ‘Manage Integration’ page. The “Sync Users & Doors” section records the timestamp of your last successful sync, for example:

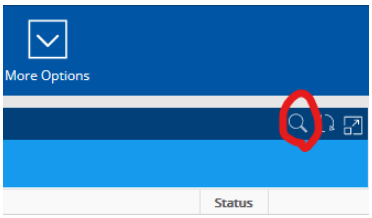
Last sync performed: 5/5/2019 1:07:07 PM.

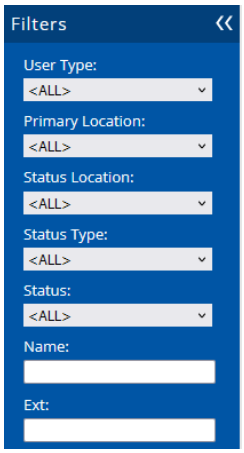
Clicking on that link will provide more details and allow you to edit each imported user.

Customize User Data & Photos

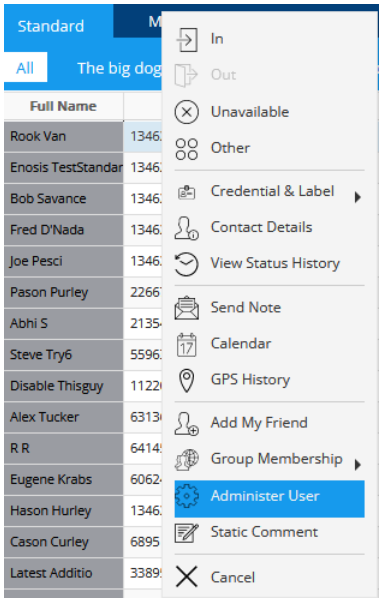
Once you've synced your users from PDK to Savance Workplace, you can modify their information through the home page.

If you want to find a user, you can use the search button on the right side to open up the filter menu on the left side of the screen.

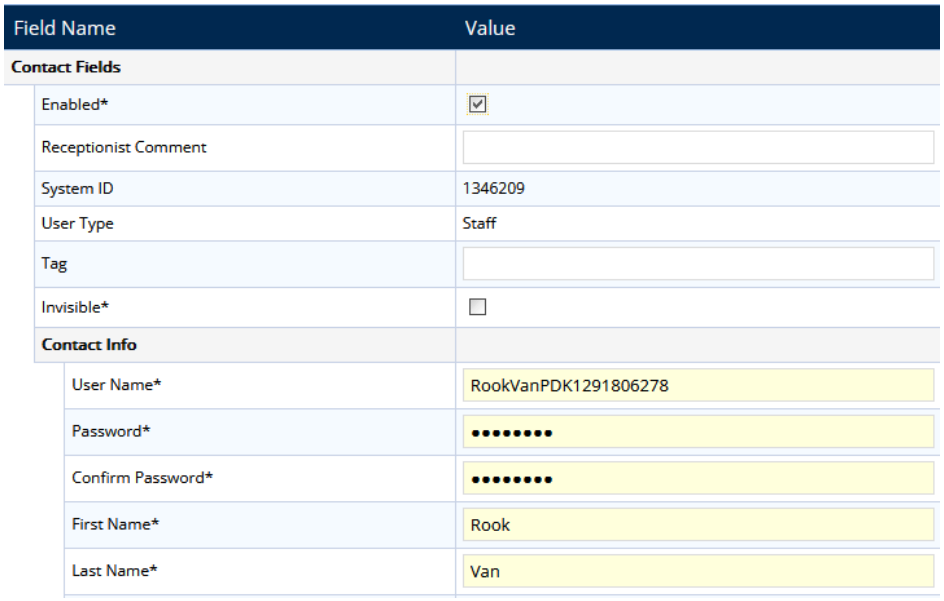




To customize user information such as their photo or a field, right click on the user and select "Administer User" (non-administrator users in Savance Workplace who have user manager privileges can click on "Contact Details" then click the Edit Info button)

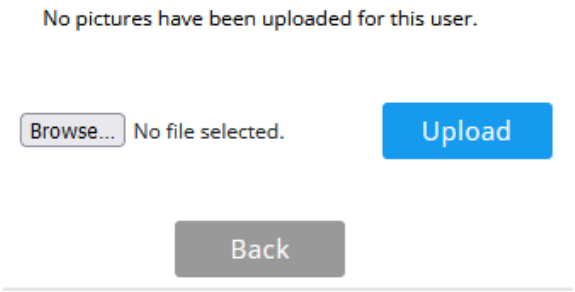


In this administration page all of the data pertaining to a user may be edited:



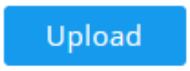
If you would like to change a user's image inside Savance Workplace, click on their profile picture on the same page where you can edit their information.

The following prompt will show up:

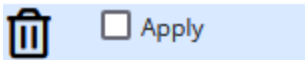


If they don't have any pictures available and you'd like to add one, follow these steps:

1. Select "Browse..."
2. Select an image
3. Press the "Upload Button"



4. Select the check box next to the image that you uploaded, and then press "Back"

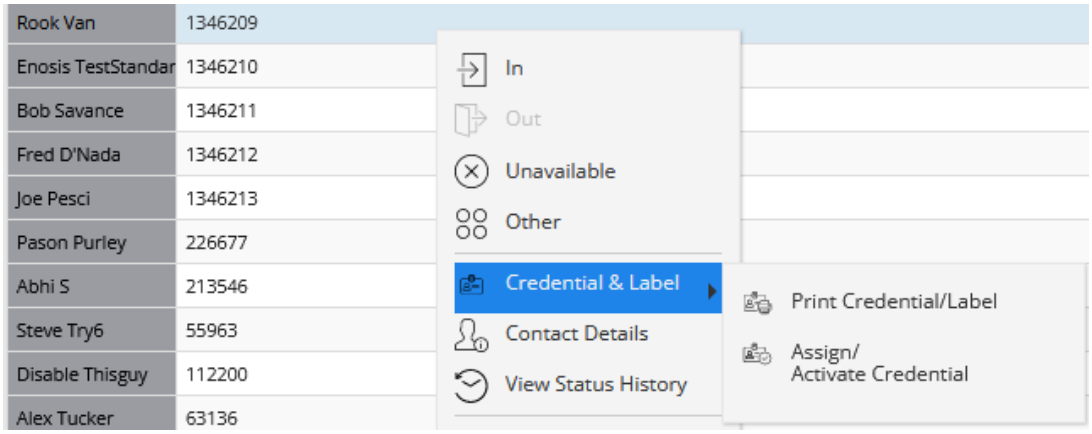


The user now has an image associated with them in Savance Workplace.

Printing Badges

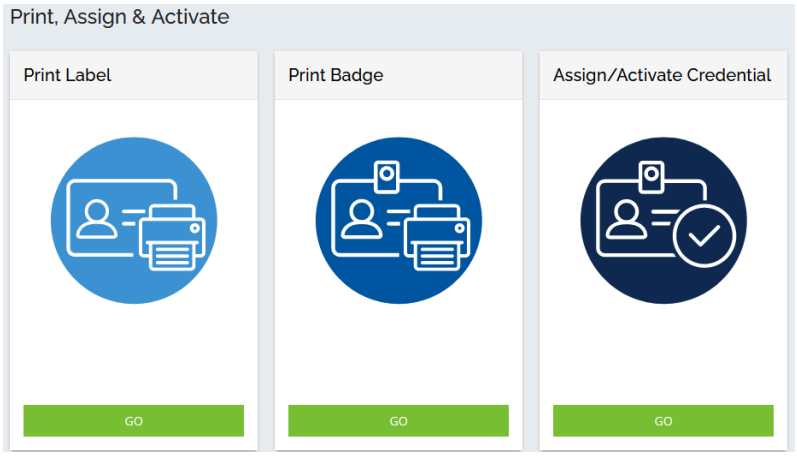
Savance Workplace Web Instructions

Right click on the user that you would like to print a badge for:

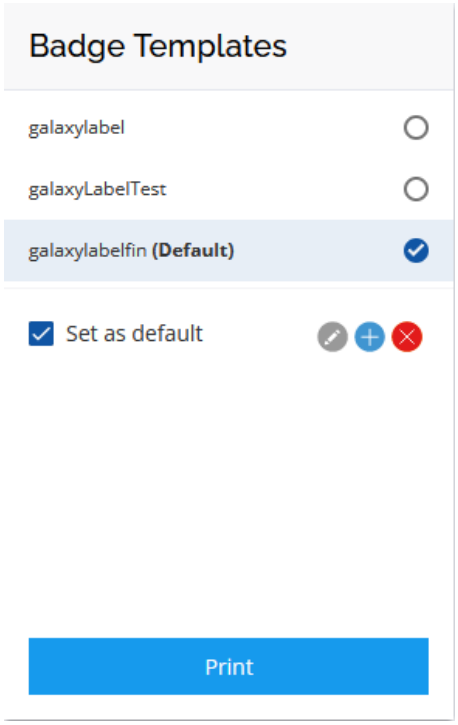


Open the “Credential & Label” menu by hovering your mouse over it, and then select “Print Credential/Label” from the menu.

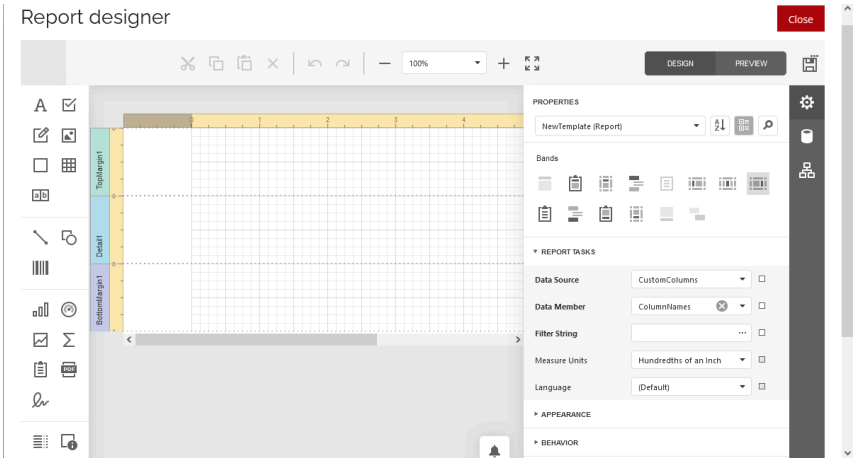
On the following screen, select “GO” under “Print Badge”.



Select the template that you'd like to use to print the badge, and select print. You may check the "Set as Default" checkbox if you would like future badges to be printed using that template in the future.



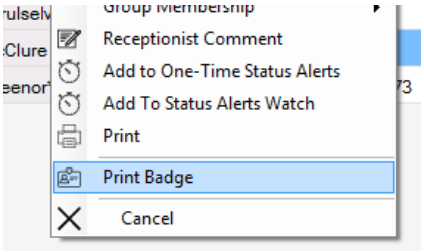
If no template exists, select the icon on the bottom of the box.
This will open the template designer.



We recommend that you design your templates in the desktop app for stability, but you can design them here as well.

Savance Workplace Desktop Instructions

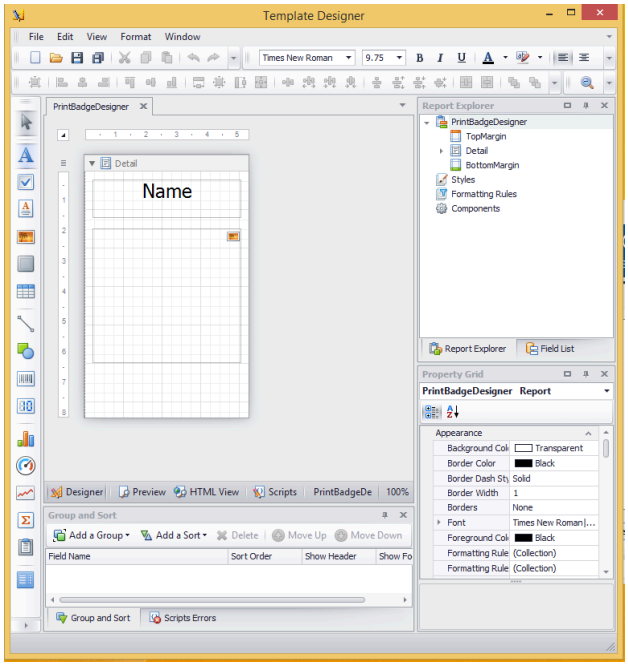
The Savance Workplace Desktop App can also print badges. The most recent version can be downloaded from this location: Savance Workplace Desktop Download
To print a user's badge from the desktop app, right click on the user and select "Print Badge":



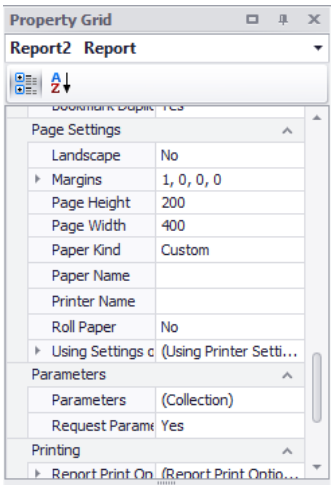
This will open the Template Selector Window. If there are no templates available, you can create one in the Designer.

Badge Designer

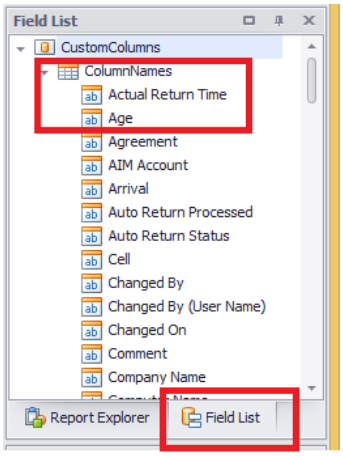
When you create a new badge or click 'Designer' on an existing one, it will open the Template Designer. This is your canvas for designing a Badge Template.



By default, the size of the print area is the same size as the standard RFID access card. You may edit the template as you wish. To change the Template Size and Orientation, you can set the Page Height and Width in the Page Settings, which can be found in the Property Grid at the Bottom Right:



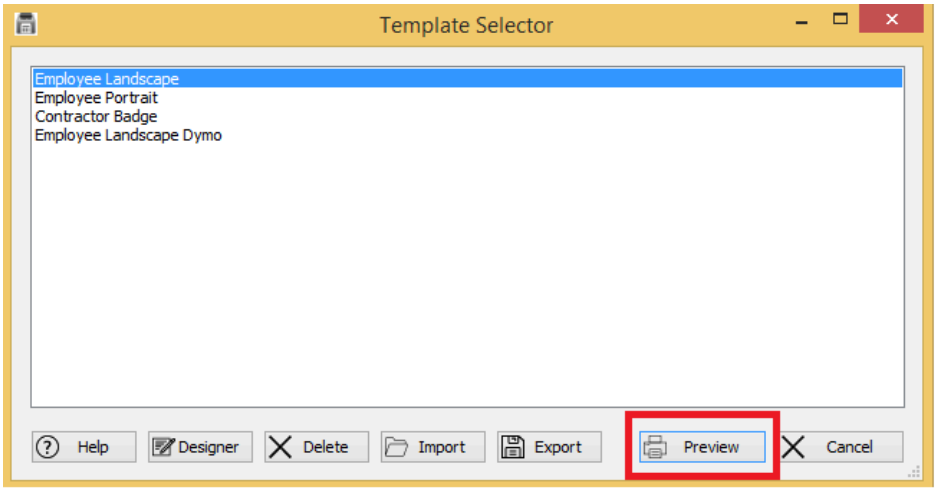
User fields may be added to the card by clicking on the "Field List" tab and expanding "Column Names."



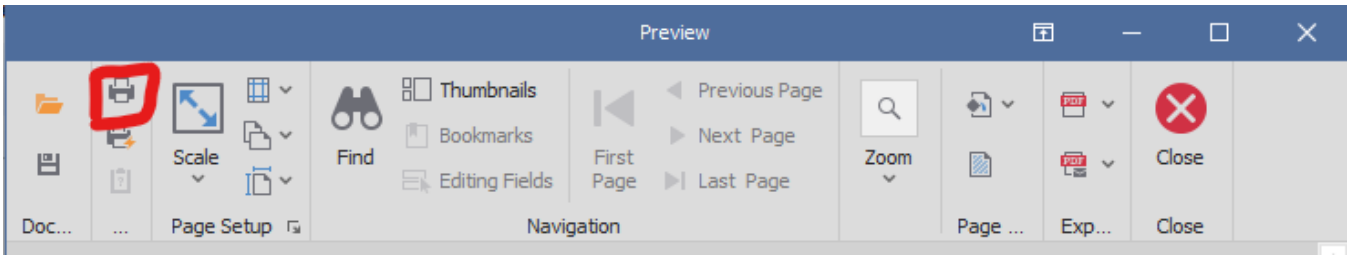
Any of these fields may be dragged onto the card template.
Once the badge template is designed to your satisfaction, use the Save icon in the upper left to save the template for future use:

Printing a Badge

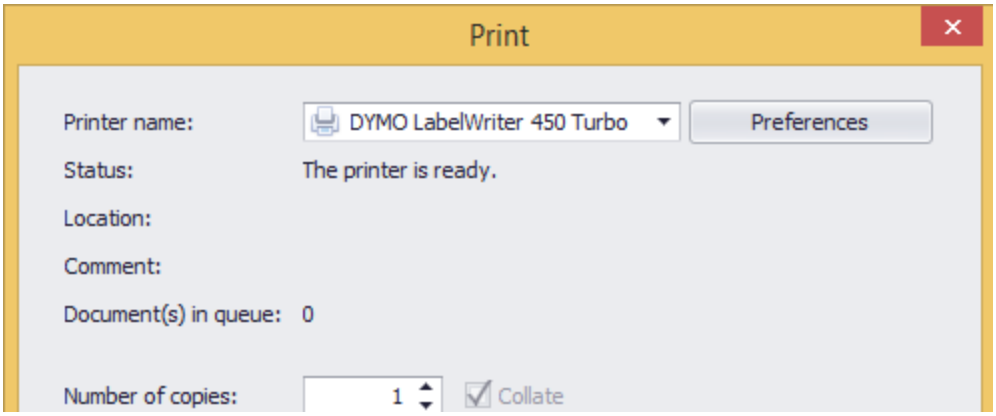
Once there is at least one template, select a template in the "Template Selector" window and click "Preview:



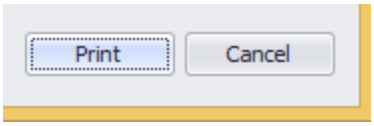
This will open the “Preview” window. From here, click the “Print” button on the top left:



Double check that the information on the Print page is correct.



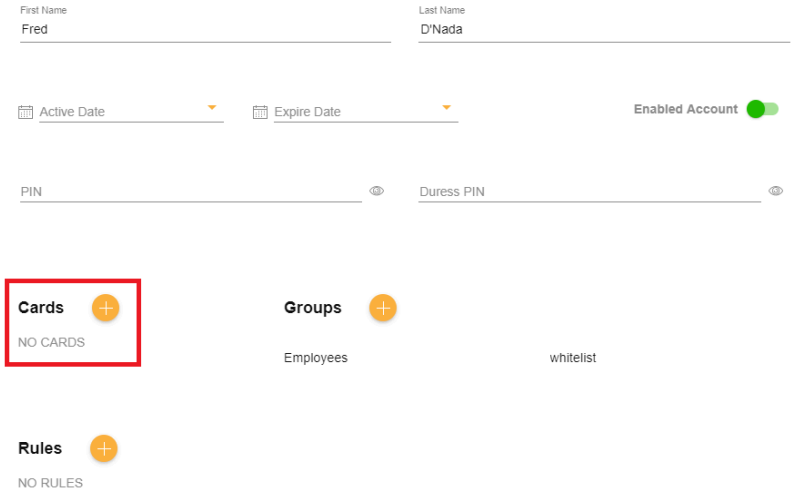
When ready, click the Print button:

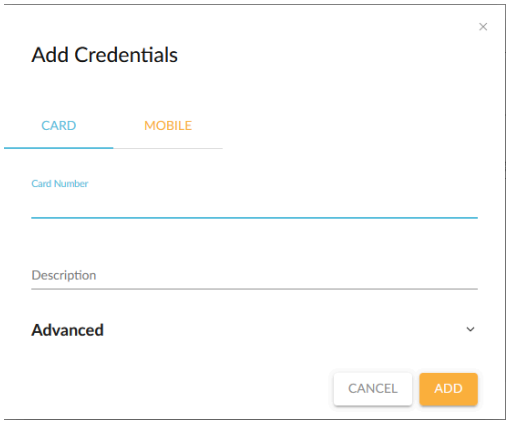


Assign the Badge to the User

Once a badge has been printed and you know the badge number that will belong to the user, go back into PDK and assign the badge number to the person. You can find their by using an RF IDeas enrollment reader.

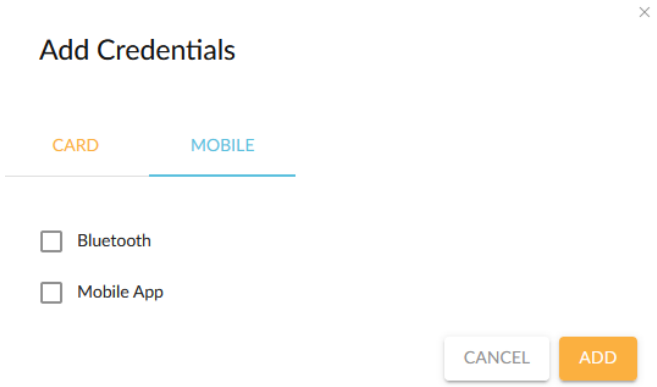
Back in https://pdk.io, select a person and click the "+" next to Cards:





Then enter the card number associated with that Person. This information can be found on the Savance Workplace desktop app in the user panel or on the badge itself, if it was added to the template.
After you select add, the card is ready to be used.

If you would like additional functionality, you can enable mobile phone authentication options in the same menu by navigating to the “MOBILE” tab, and enabling the check boxes.



Additional Information

If you’d like extra information on how to use a Zebra printer or set up a camera on your device, documentation can be found here: Badge Printing with the Zebra Printer