SedonaOffice

CSM Central Station Integration
Reference Guide

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About This Guide

This guide is a functional overview (living document) and provides conceptual and summary operational information. This guide does not define all fields within the application; the application provides some definitions while other field names are familiar terms to those in the security industry. The assumption is that the reader is familiar with central station automation systems, as well as web services technology and terminology. (This text is Normal font style)

Overview

SedonaOffice is now offering basic integration to the third-party Central Station software package CMS. Users of CMS can create a new central station account through SedonaOffice, attach an existing central station account to a SedonaOffice system, and view select information on an already existing central station account. Companies that are interested in utilizing this new integration must be setup by our staff to use this feature. Please contact our sales office at SedonaOfficeInfo@boldgroup.com to schedule a demonstration or request installation.

Please note, the monitoring software itself also must be licensed and configured for this integration. This document details the SedonaOffice portion of the integration. For more information on the monitoring side please see your monitoring software provider. If your provider is a Bold Group company, this documentation is also available in BoldU. For all others, please contact your provider for more detail.
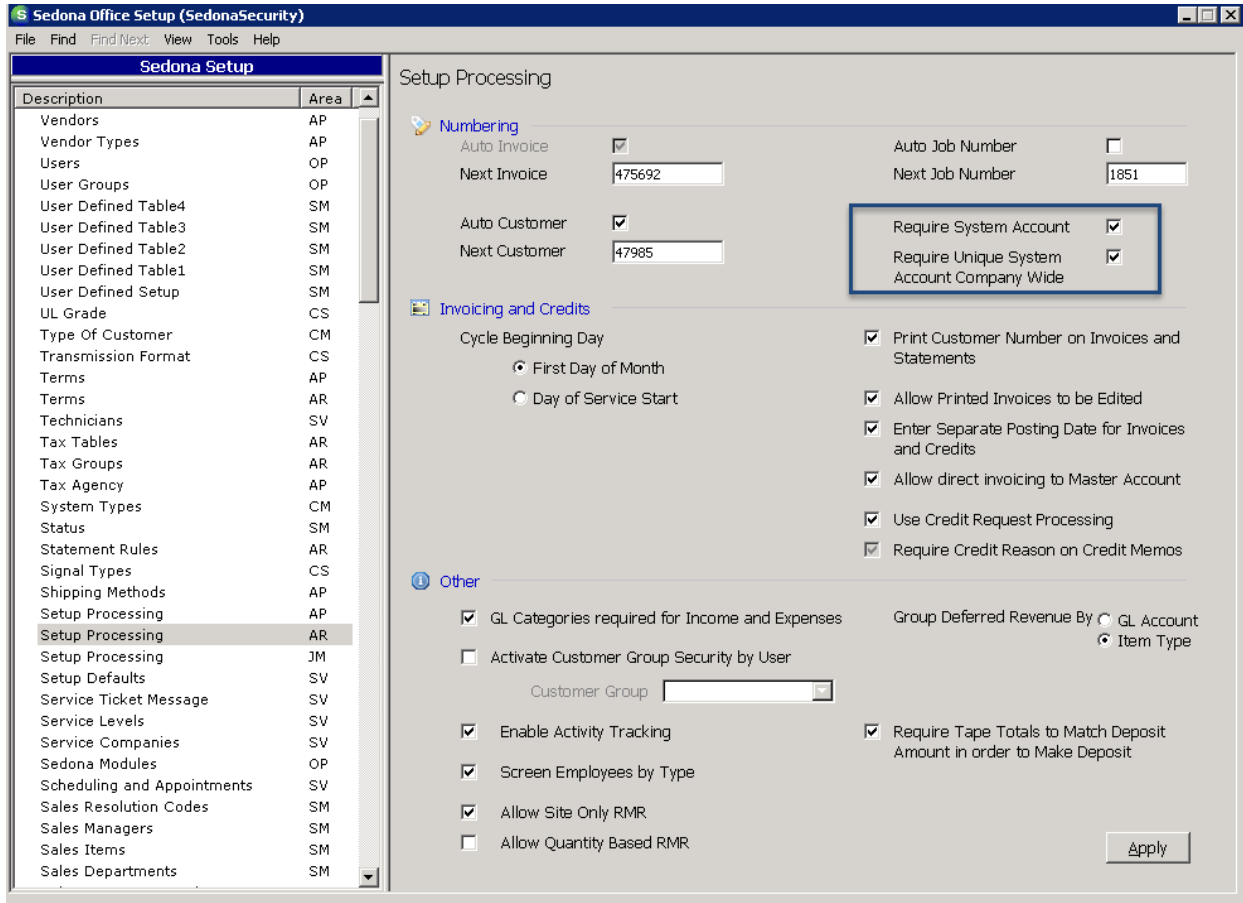
Setup

Using the usercode Administrator, the SedonaOffice Administrator must access the Modules table within SedonaSetup. A checkmark must be placed in the box "Use Central Station Tracking."
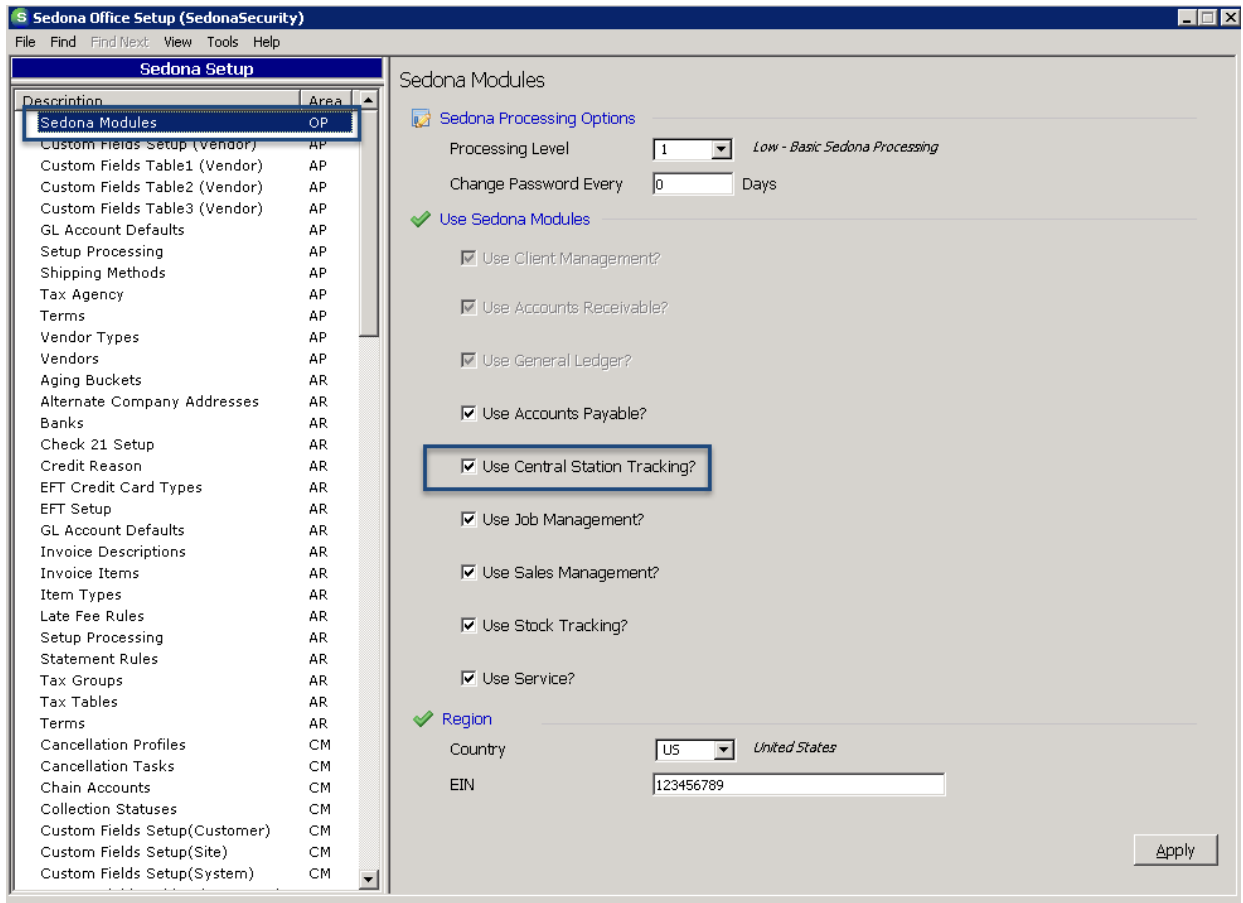
Once our staff has turned on CMS, the Alarm Company CMS will be displayed in the list of Alarm Companies in the Alarm Companies Setup Table.
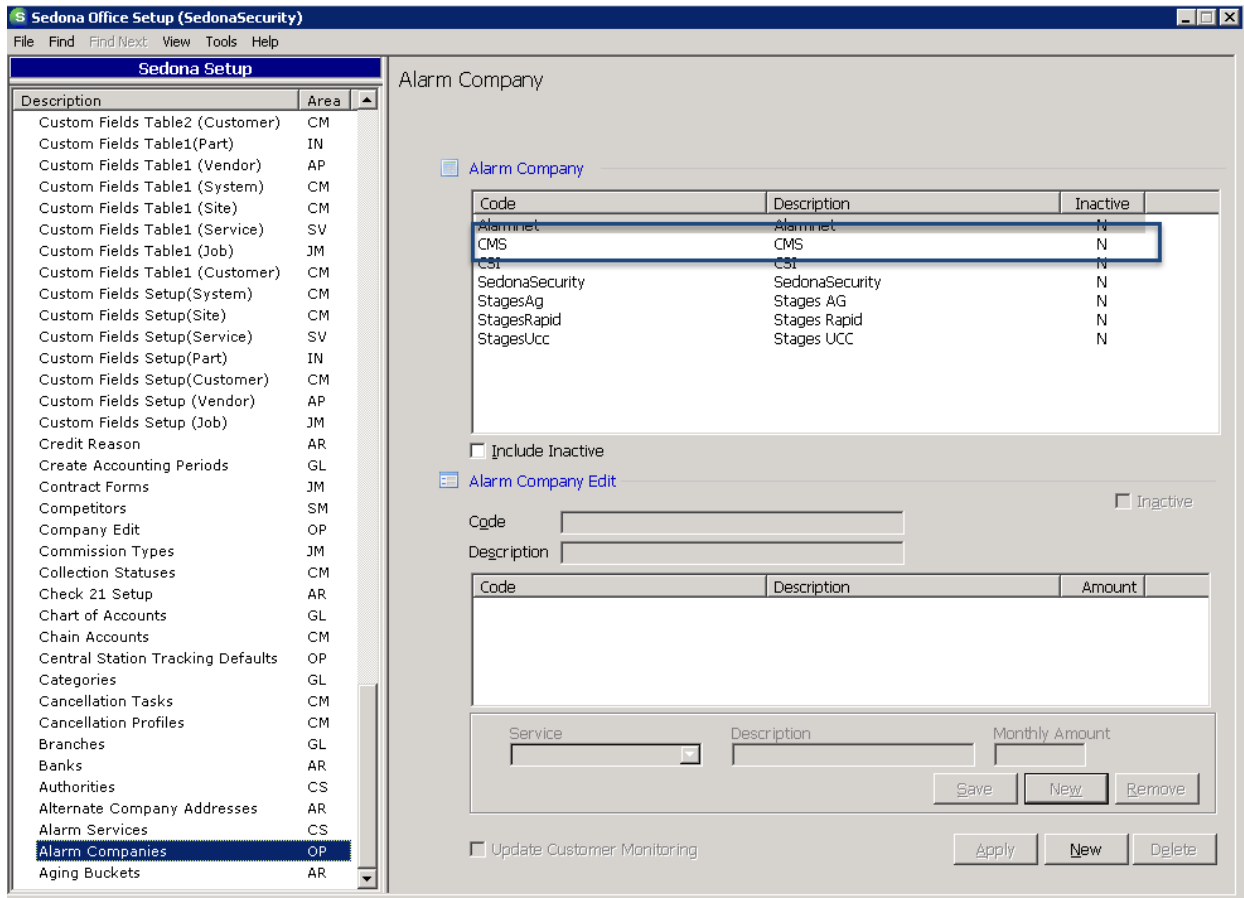
CMS will assign a block of system account numbers to your company. SedonaOffice does not track these numbers or report on the ones that have not been used. To ensure that you do not assign the same system account to more than one system, it will be important for the System Administrator to navigate to the SedonaSetup table entitled "Setup Defaults-AR" and place a checkmark in the boxes displayed below to require that system accounts to be assigned and that those account numbers be unique.

Integration Setup

Navigate to the Integration Setup table within SedonaSetup. Highlight CMS and click on CS Setup.
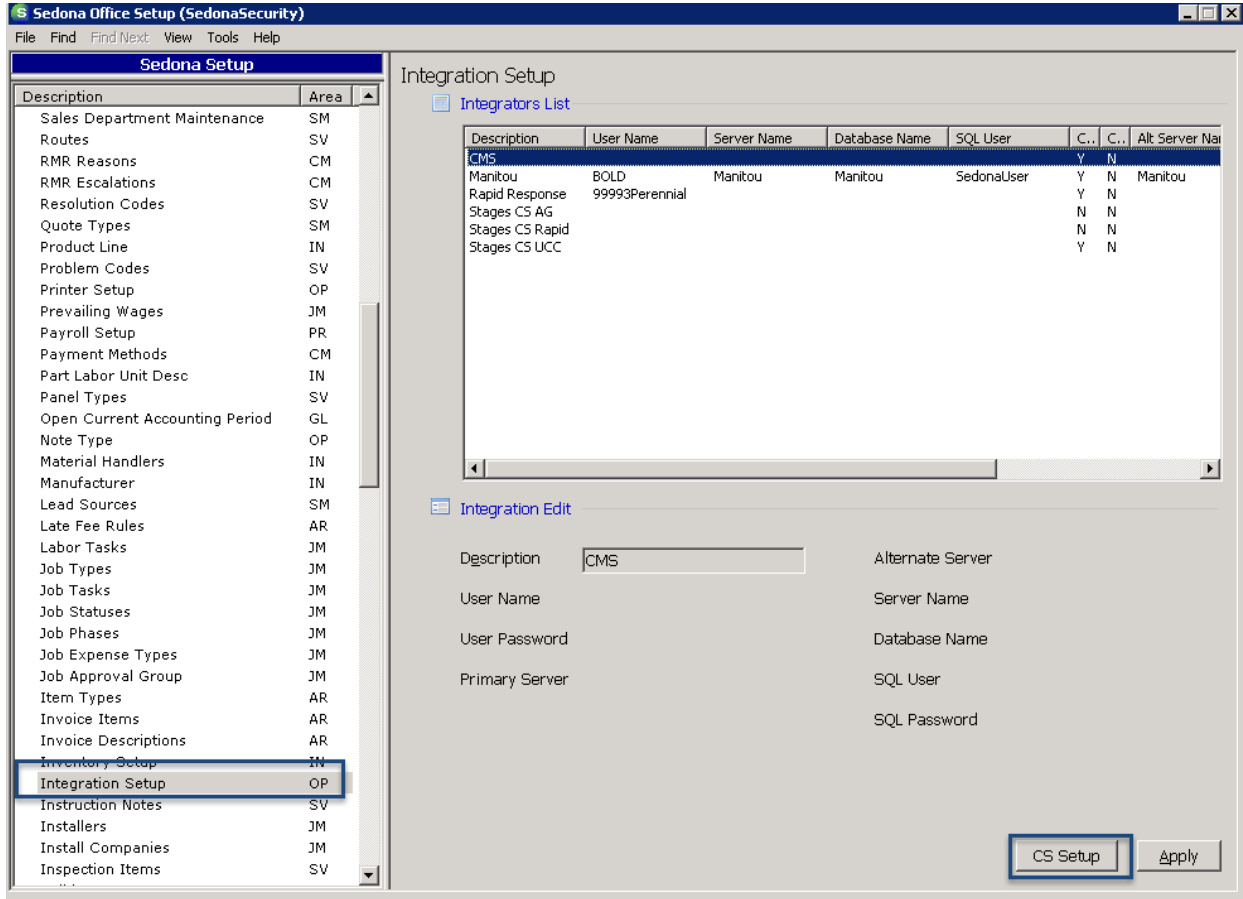
Credentials Setup

Besides web service credentials, CMS filters inbound traffic to their web service based upon the IP address of the request. *Customers must discuss this IP Address with CMS prior to integration to ensure that the Central Station integration feature will function properly*. CMS will provide credentials to the customer for its web service as either company-wide settings or user-level settings. The company-wide credentials approach means that one set of credentials will be used by any user using CMS's web service. User-level credentials means every user has their own unique set. Tabs appear in the form for each approach (A and B).

If CMS issues your company User Level Security credentials, a checkmark must be placed in this box. The User Level Credentials tab will be disabled (B) unless a checkmark is entered into the box. For company-wide credentials, the user must enter the values obtained from CMS into the text boxes in block (D). A test to check these credentials with CMS can be executed by clicking the Test button (E). Setting up user level credentials (if supplied by CMS) is very similar with one important caveat. *The caveat is that the values for Block D for Service Company Number, Install Company Number, and Service URL must still be entered for user-level credentials to function. A test box appears in the User-Level Credentials tab for Service Company Number but it should be left blank unless CMS instructs otherwise.*

Creating a New Central Station Account

Creating a New Customer System Needing a New Central Station Account

Customers must have a system already created for a new central station account to be created.

1. Create a new system for the customer, entering their system account, type, and panel type (if known). Select CMS as the monitoring company from the drop-down box in the Monitored By field.
2. **Leave the CMS Account Number blank**. This indicates that you are creating a new account with CMS.
3. Press Save to create the new system for the customer.

4. Edit the customer system.
5. Click the CMS Info button at the bottom of the form.

The CMS Central Station System Form will be displayed. Proceed to the directions in the section entitled "CMS Central Station System Form."

Editing an Existing Customer System To Add a New Central Station Account

If the customer already has a system, edit the system, and select CMS from the drop-down menu in the Monitored By field. Do not enter any information into the CMS Account Number field. Press the CMS Info button at the bottom of the page.

If any central station information exists within SedonaOffice Central Station (C/S button) for the system (e.g. contacts and zones), the user will be prompted to export the data into the Central Station System Form.

If no information exists in the Central Station (C/S) area, respond by pressing the No button. The CMS screen will appear.

If Central Station information does exist, respond by pressing the Yes button. Upon responding Yes, the CMS Central Station screen will open, *but it will be minimized at the bottom of the screen. Hover over the SedonaOffice button in the toolbar at the bottom of the screen, and select CMS to bring it to the forefront.* The CMS screen will appear.

CMS Central Station System Form

Section A   This system information is taken directly from the system form within SedonaOffice. It includes the customer name and number, the site name and address and a description of the system.

Section B   The central station account number should be entered into the field entitled CMS Account Number. CMS may refer to these numbers as transmission codes. The Master Site Password should be entered into the field Site Password. CMS will issue a range of account numbers available for use. *The use of these numbers must be tracked outside of SedonaOffice. SedonaOffice has no way of tracking which codes have been used or auto assigning any account numbers.* If a user accidentally attempts to assign a previously used number, an error will be received at the time that the central station account is saved.

Section C   CMS has tabs for Contact List, Zones, Timer Settings, and History.

Section D   The order of contacts may be modified by highlighting a specific contact and using the up and down arrow to change their order.

Adding a Contact

New contacts may be added into the Contact List grid. These should be entered in priority order based on who should be contacted first. The first contact is always assigned the number 0. Position the cursor in the line underneath the first contact to add the next contact.
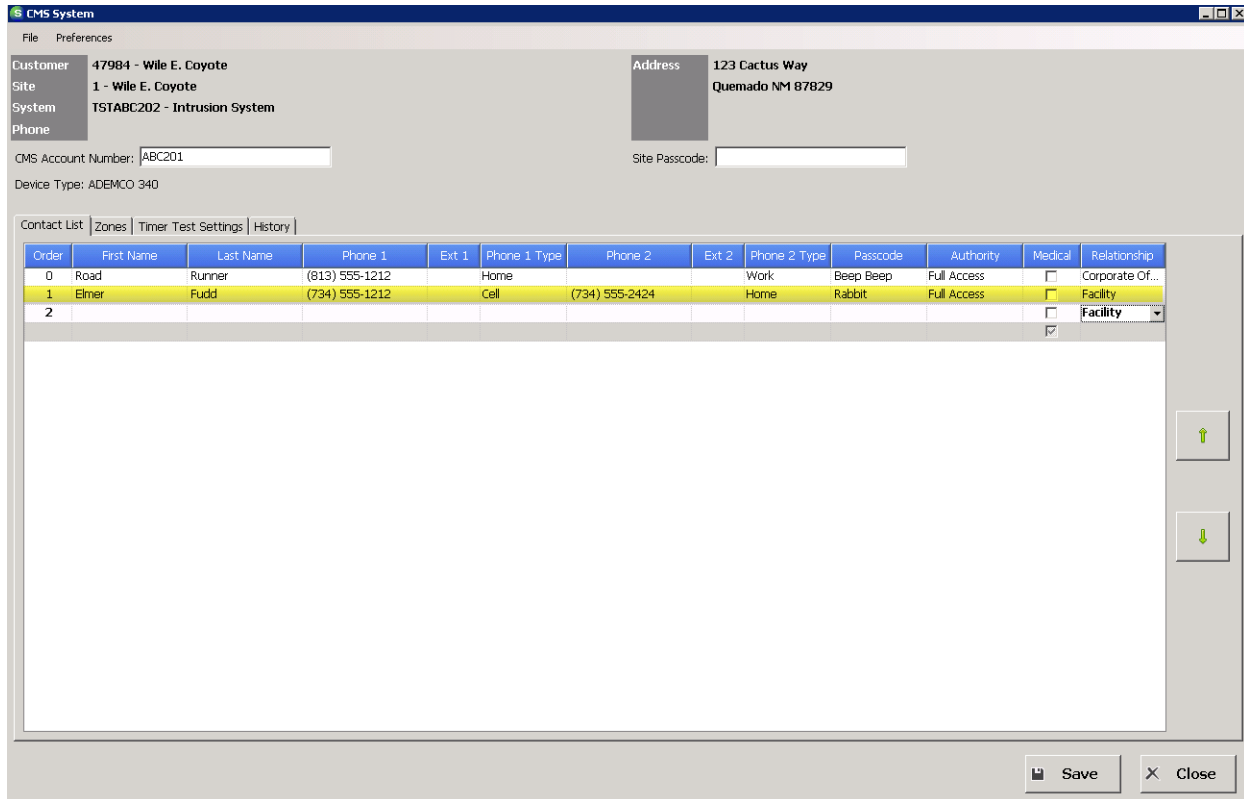
The Passcode is the word provided by each contact as a means of verifying their identity on the telephone. CMS requires that the Authority column contain "Full Access". This may be selected from the drop-down menu.

The order of the contacts displayed may be changed by using the up and down arrow button on the right-hand side of the screen.

Note: It is not currently possible to delete contacts through the integration. Users will need to access the CMS software to remove them.

Adding Zones

The zones tab identifies a specific area being monitored by the system. Zones may be entered directly into the grid.

Zones are adding by positioning the cursor under the first zone and typing in the required information. CMS will provide users with information on the Event Codes that they recognize in their system. Those entries must be typed into the Event Code field. At the request of CMS drop-down boxes are not provided.
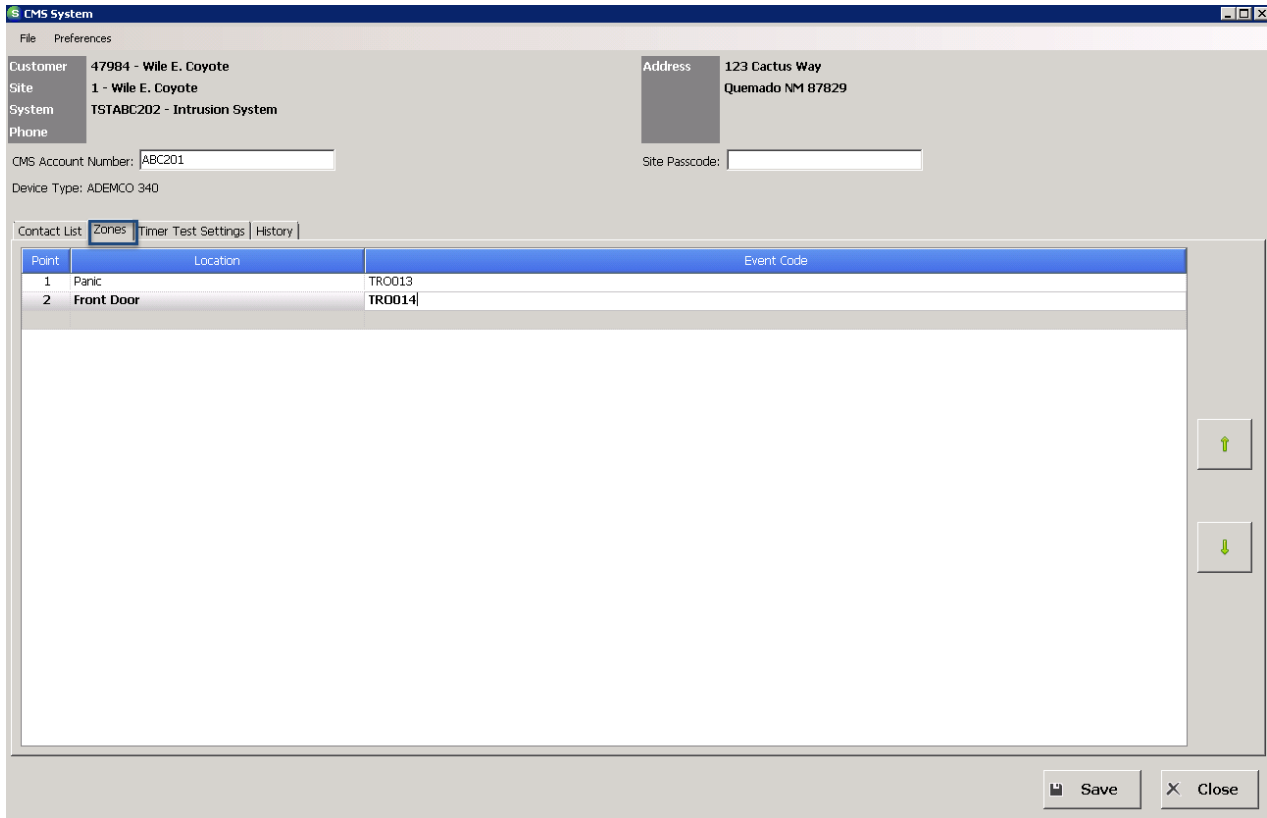
Note: It is not currently possible to edit or delete zone information. Users will need to access the CMS software to make these changes.

Timer Test Settings

Timer Test Settings indicate whether CMS will be testing the system and the frequency of those tests. If the Activate Time Test checkbox is not checked, the values of the Interval and Test Type drop-down fields are not relevant.

History

CMS history may not be viewed until such time as the CMS record has been added. This may be viewed once the addition is completed (see directions below).

Once all information has been entered into the CMS System Form, press Save.

The system presents the following message:
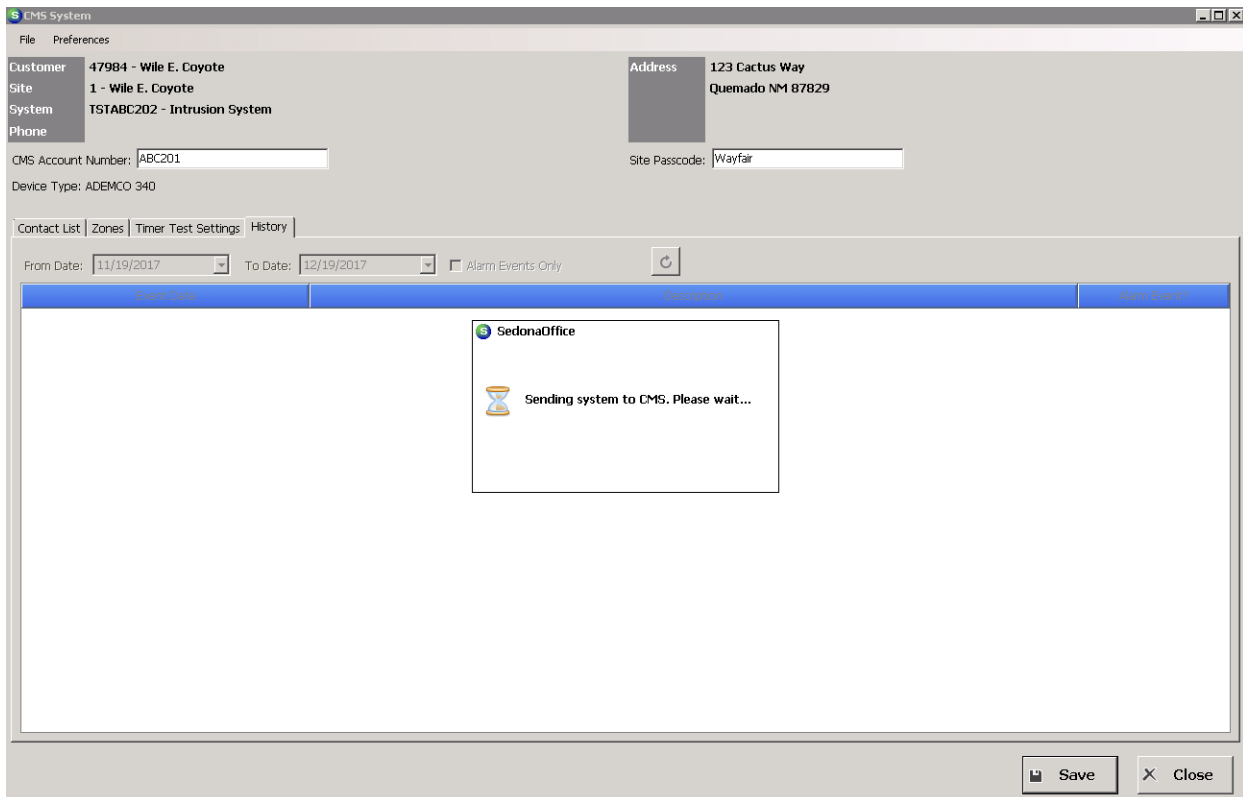
When the acknowledgement notification comes up, the user may click on the OK button.

Attaching a SedonaOffice Record To An Existing Central Station Account

Users may link a record created in CMS to a system within SedonaOffice. To link a SedonaOffice system record, please do the following:

1. Select the customer within SedonaOffice for which the link to the CMS is needed. Edit the customer's system.
2. Enter "CMS" from the Monitored By drop-down list.
3. Press the CMS button at the bottom of the screen. The system will respond:

4. Enter the CMS account number which has been assigned to the customer along with the master site password on the CMS Central Station System form.
5. Press Save to save on the CMS Central Station System form.

View an Existing CMS Record Within SedonaOffice

Users may view contact and zone information on an already existing CMS record within SedonaOffice. Users may add (but not edit or delete) information on the CMS System Form. Updates to contacts and zones must be done directly within the CMS software.

Users may view a CMS record by editing the system record within SedonaOffice and pressing the CMS button at the bottom of the screen. Users will receive the following message

The CMS record will display on the screen.

Activate Test Mode

Users are able to activate and deactivate the test mode on a system. After the CMS record has been added, the Activate Test Mode button may be seen directly underneath the Site Passcode on the right-hand side of the screen. Users may enter the time in minutes (the default is 60) for test mode or they may use the slider to the right of the text box to designate a period higher or lower than 60 minutes. The minimum is set to 1 minute and the maximum to 120.
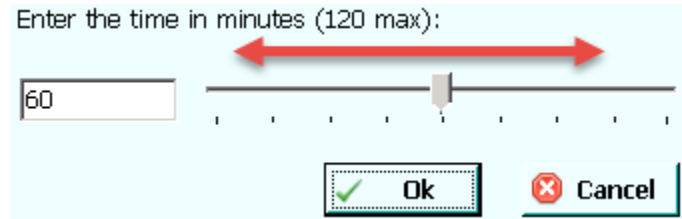
Once the time is set, the user should click on the OK button. Once this button is pressed, the button on the CMS system form will change to Deactivate Test Mode.
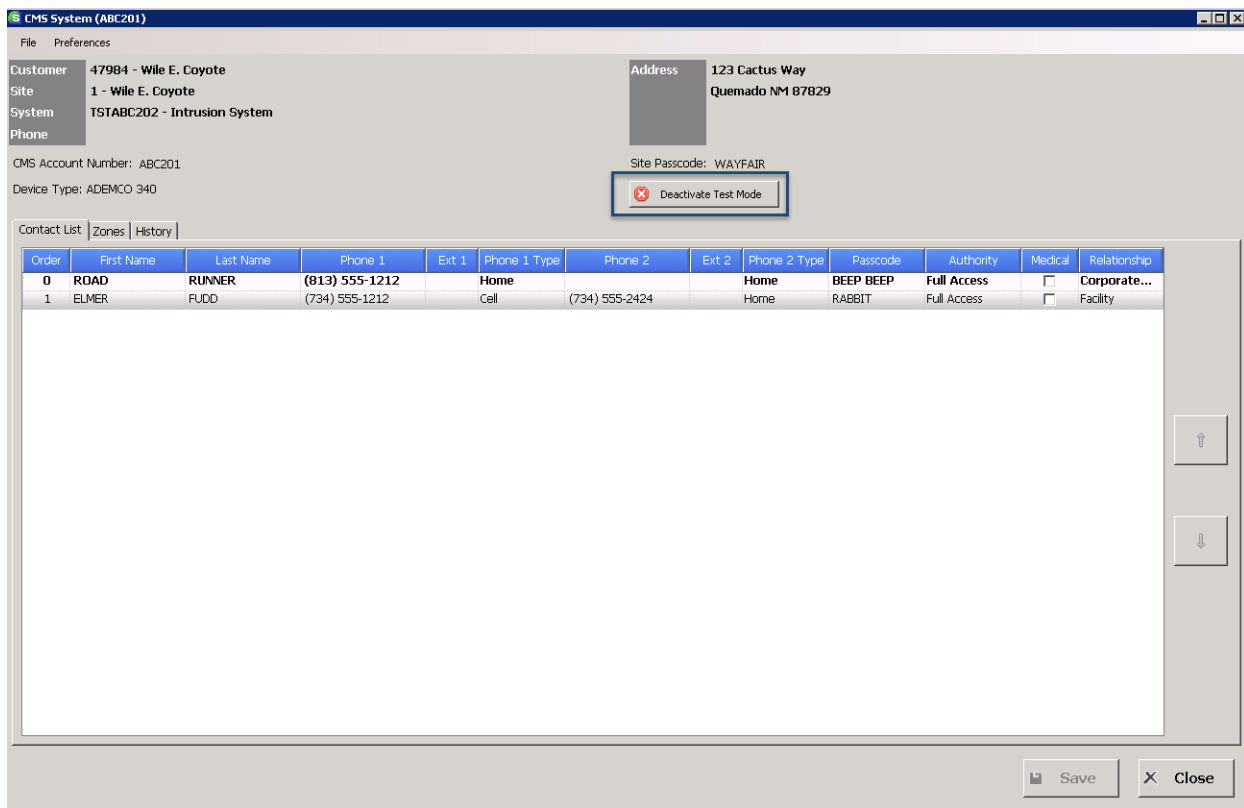
Deactivating Test Mode

Once testing has been completed, users may click on the Deactivate Test Mode button. Clicking this button sends a command to CMS to deactivate the test mode for the system. If this button is not pressed, the test will end after the elapse of time indicated for the test when test mode was activated. If the CMS form is open at the end of the test, the button will continue to display Deactivate Test mode until the user exits the form and comes back in.

Viewing System History

Test history may be viewed on a system by clicking on the System History button.
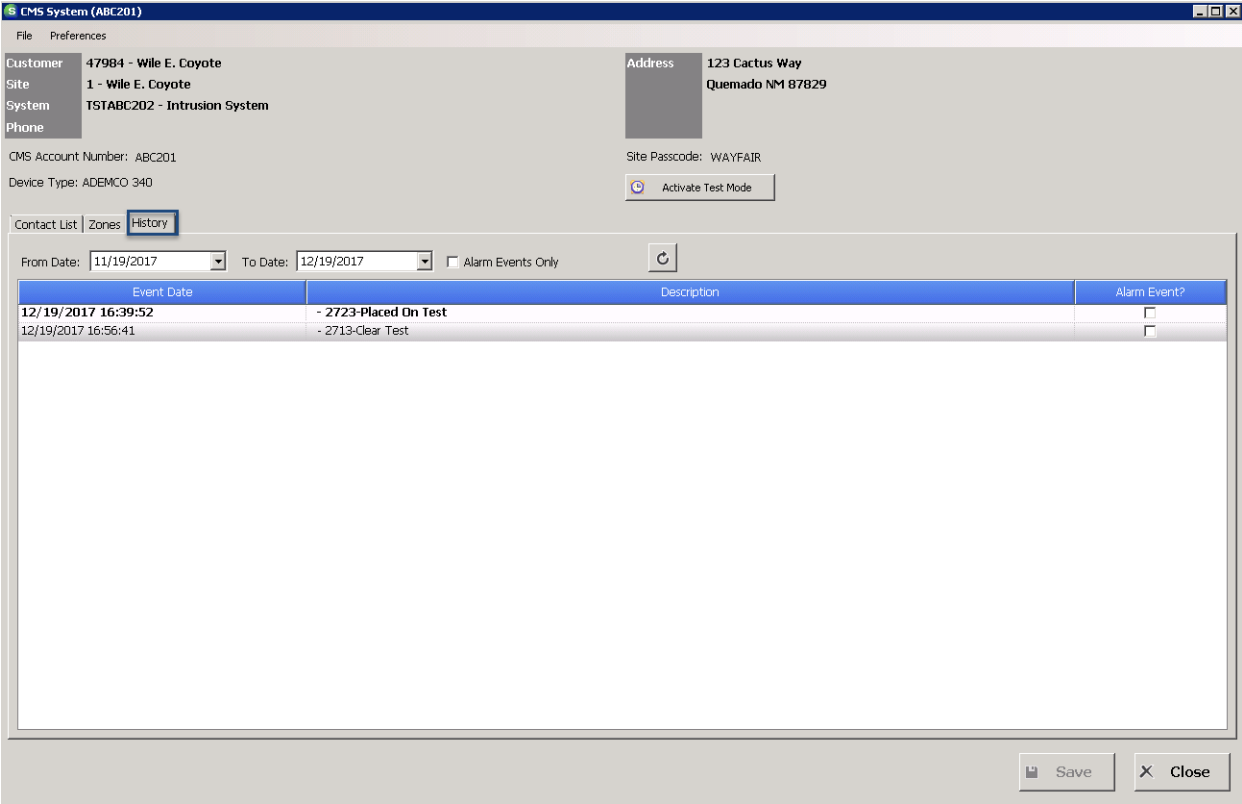
Users may enter a range of dates in which to review test history in the From and To date fields. The default is 30 days. Each time that history needs to be reviewed, the user should press the Refresh button [icon] to ensure that the latest information is obtained.

Users can elect to only view alarm events by placing a checkmark in the box "Alarm Events Only" next to the From and To date fields.