



**VIVA LA  
PROCESS!**

**VISITOR MANAGEMENT**

**REVOLUTIONIZED!**

**J**

**JAMES**

SYSTEM DESCRIPTION | VERSION 07. 2020

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## FOREWORD

Our visitor management system JAMES has been developed and perfected over the last years in close cooperation with leading security and facility service providers. The digitalization of procedures and processes from the areas of security and service has always been at the forefront of our development. Of course, the focus is always on the visitor, or rather the visiting process. Someone is invited, arrives, has to orient themselves, is received, stays on the premises and finally leaves again. All these stages are linked to processes that we believe a modern visitor management system should coordinate and bundle in order to support both the employee and the guest and to make their stay easier.

We have therefore adapted JAMES to the modern world of work and the conditions of Industry 4.0. Starting with the invitation by e-mail, via the online portal for visitors, pre-registration via app and our kiosk terminals for reception, we always focus on easy handling by the users and easy comprehensibility for the visitor. A high degree of compatibility with existing hardware and common standards, such as a connection to Microsoft Active Directory and Outlook integration, ensures easy implementation in your company processes.

In this document we have compiled the most important information on the structure of the software for you. You can also use our knowledge database, the MetaWIKI, or simply contact us if you need further information.

## GOALS AND BENEFITS

- Structuring of visitor flows
- Digitization of receptions
- Data protection conformity
- Keeping track of procedures and processes when coming and going
- Maintenance of safety instructions and training
- Visitor history
- Central overview of foreign persons on the premises
- Relief of front office staff
- Equalization of the Babylonian confusion of languages at the reception
- Guarantee of a self-sufficient self check-in for the guest
- and much more...

## METAWIKI - ANSWERS TO YOUR QUESTIONS

The metaWIKI is the knowledge database of metaSEC. Here you can find the detailed documentation and manuals of our software solutions. These are regularly extended and updated.

If you are missing articles or urgently need manuals, just send us an email. We will try to answer your questions as soon as possible and explain them in the form of tutorials in an understandable way and include them in the WIKI.

*By clicking on the fields below you will be directed to the corresponding articles.*

## AVAILABLE PLATFORMS

JAMES requires a server backend system for the operation of the databases as well as the web services. The server system is based on Linux and is largely independent of the system environment.

Currently the following variants are offered and supported:

- Hardware appliance for standalone operation
- Virtual appliance for operation within a VMWARE® environment
- SaaS as a rental model

If the system is operated within a separate IT system, it must be ensured that the system is sufficiently dimensioned in terms of performance.

The software is completely pre-installed on all systems and is always up-to-date. You can start with the setup immediately.

## HARDWARE APPLIANCE

In some environments, remote locations or other circumstances, the use of virtualization is not possible or reasonable. Our hardware appliance is a 1U short rack unit, which is also delivered as a "ready-to-run system". The low installation depth of only 220 mm allows installation even in distribution cabinets with limited space. The system is equipped with 4 network cards and supports the separation of application and management LAN.

metaSEC guarantees a delivery availability of up to seven years for the system. This is extremely important especially in critical environments. The performance of the appliance also allows to map complex JAMES setups and workloads.

Furthermore, a change to a larger system or a virtual appliance is possible at any time. For this purpose, only a backup has to be installed on the new system.



*To learn more about setting up the hardware appliance, download our Quick Setup Guide [here](#).*

## VIRTUAL APPLIANCE

Virtualization and cloud computing are among the biggest trends in the IT industry in recent years. Consolidation of IT processes or simplification of the infrastructure are the primary drivers of this trend.

The virtual appliance is our answer to these market needs. It includes all the functional features offered by the hardware systems and can cover almost any performance requirement. The performance limit is only defined by the underlying environment.

Larger environments can be split into several instances to achieve even higher efficiency within the infrastructure.

The server is available as "ready to run" VMWare® Image or deployment template in OVA format.



A VMWare Player Image can also be downloaded for demo purposes - an incredible advantage in the sales process and customer presentation.

## SOFTWARE AS A SERVICE – JAMES-DO-IT.COM

If the user does not wish to operate his own backend system, he can obtain the entire service via the online platform [www.james-do-it.com](http://www.james-do-it.com)

The platform provides all functions, including client and multisite capabilities. A big advantage is that the user is always up to date with the latest software.

Billing is on a monthly basis and depends on the selected package.

*Please do not hesitate to contact us.*



## SYSTEM STRUCTURE

The system consists of three portals:

- The visitor portal for guests. They can view their appointments, download documents or upload them after processing (signature, stamp).
- The host portal for managing invitations
- The system administration portal for all global settings

Only the first two portals are required for daily operation. Access is possible via a login and also controls the respective data access.

The users for the host portal must either be created in the system portal or, if a Active Directory® Connector is used to enable AD.

The users for the visitor portal are automatically generated and consist of the guest's e-mail as user name and an automatically generated password. The guest users are only created once in the system and are used for recurring appointments.

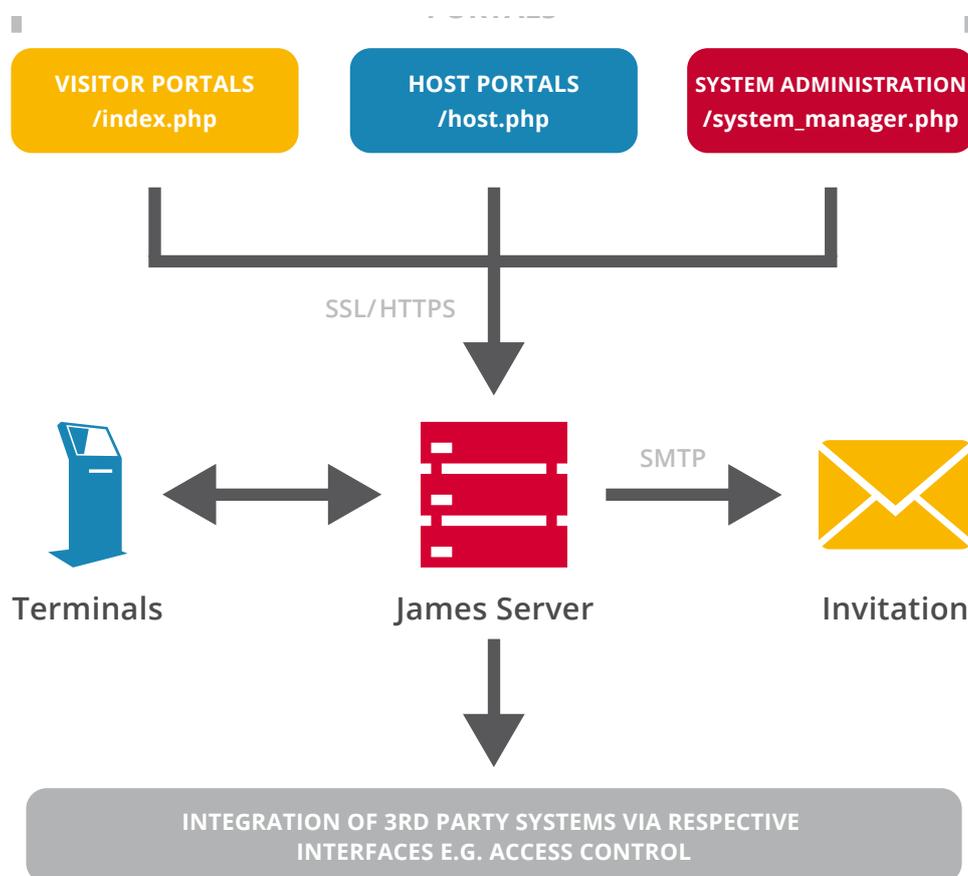


Figure: Logical structure of a JAMES minimal system

## NETWORK

JAMES provides its services via standard TCP/IP protocols. As long as no special backend systems are queried (Exchange, Intercom), all traffic is handled via HTTP / HTTPS. The standard ports 80 for http and 443 for HTTPS encrypted transmission are also used here.

SMTP is used as a protocol for notification and sending of invitations. Mail dispatch is necessary for proper and complete operation.

JAMES can deliver e-mails directly or forward them via a smart host. The second method will usually be the better one in practice.

If additional connectors are used, the following network settings and authorizations may still be relevant:

Dienst	Typ	Port	Richtung	Anmerkung
WebUI / HTTP	TCP	80	in	Management
WebUI / HTTPS	TCP	443	in	Management
SMTP	TCP	25	out/in	E-mail for messaging
LDAP	TCP	379	out/in	Active Directory Sync
HA Sync	UDP	694	in/out	Clustersync
IO Units	TCP	443	in/out	For control of relay contacts
MySQL	TCP	3306	in/out	Reporting
NTP	UDP/TCP	123	in/out	Network time
RTP	UDP	10000+	in/out	Freely configurable and powerful depending on environment/area
SIP	UDP/TCP	5060	in/out	SIP Control port
SIPs	TCP	5061	in/out	Encrypted SIP Port
SNMP	UDP/TCP	161	in/out	Monitoring
WEBSOCKET	TCP	9001	in/out	Various visualization tools

## CONNECTOREN

The connectors represent additional functions or connection to external systems. These functions range from e-mail/calendar connections to access control systems.

Each connector must be set up individually and often also requires settings on the respective connected system. As a rule, this requires the cooperation of external service providers. Please check this in advance.

## EXCHANGE

JAMES has the possibility to access certain resources in the Exchange directly via the Exchange Connector. These include calendars and address books. Especially the access to the address books saves a lot of time in daily work.

The communication takes place via the OWA Webservice API. For a smooth operation an Exchange user is required who has the appropriate system rights. The communication itself takes place via HTTPS, unless the Exchange is configured differently.

**For further information and configuration please visit the following link:**

# SMTP - E-MAIL DISPATCH

All external notifications are sent in JAMES via SMTP, i.e. a regular e-mail. In the simplest case, this e-mail message contains the invitation text and as an attachment the QR code as well as the ICS file with the appointment.

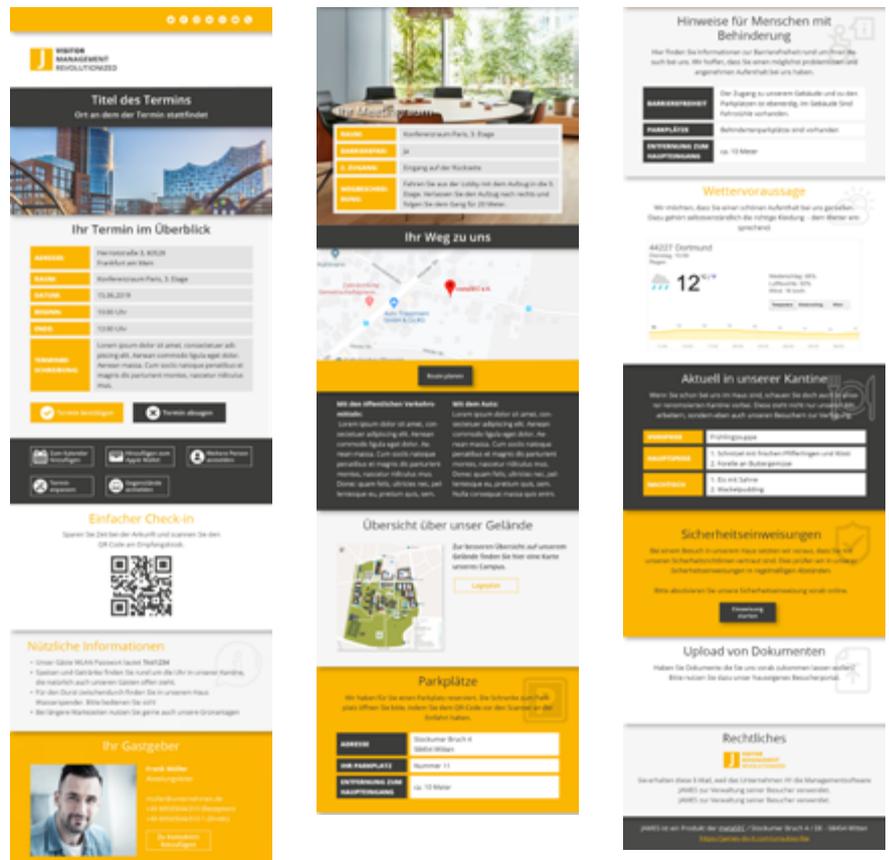
Although JAMES would be quite capable of delivering e-mails directly to the respective target systems, practice shows that the use of an intermediate system (relay) is very useful (spam, etc.).

If external recipients are to be reached, the uplink mail server must allow relay for external targets. SMTP authentication is also supported and can be stored in the connector.

# E-MAIL TEMPLATE

The e-mail template is modular and includes various sections as standard, which can be adapted to your needs. For an adaptation of the template please contact us.

Below you can get an idea of the structure of the e-mail template. By clicking on the button, you will get to the HTML file that we have stored for you to view.



## ACTIVE DIRECTORY

An essential aspect in larger environments is the management of user data and accounts. In Microsoft Windows based networks this usually happens in Active Directory. All user accounts, rights and group memberships are managed here.



In order to minimize both administrative effort and potential sources of error, JAMES offers a connection to Microsoft Active Directory®.

In the simplest case, user data such as last name, first name or email address can be compared.

However, the connector also offers complex and individual possibilities for further coupling between Active Directory user and group management and the alarm server. This goes so far that only the alarm circuits within the alarm server need to be maintained. All other data is taken from the Active Directory.

In principle, it is even permissible to query several independent domain databases and consolidate them in the local user database.

Essentially, a domain user with read rights is required for a successful query in the Active Directory. A domain can be switched in different ways. It may be necessary to set up several connectors for replication. This may be due to the fact that the users are divided into several organizational units (OU=abt1,dc=c=customer,dc=local; OU=abt2,dc=c=customer,dc=local; ...) or you only want to import a certain subset without much selection effort.

Furthermore, it is possible for a central system to map several virtual clients, each of which in turn operates its own domains. This case can also be depicted and does not represent an obstacle.

To ensure smooth operation, the server must be able to communicate freely with the respective domain controllers via the network. A firewall must allow data traffic on port 379 / TCP.

## JAMES OUTLOOK PLUGIN



With the Outlook plugin of JAMES you are able to access JAMES directly from the Microsoft software. From now on you can create your appointments as usual and extend them with the various functions that our visitor management offers you.

Conveniently book a room in a branch of your choice and add the resources you have already created, such as beamer or catering, directly. Choose necessary file attachments or send your instructions directly with your booking. All of this is now very easy with just one click.

You can also define the check-in process directly with the invitation. For example, does the visitor have to go through certain checklists on arrival or departure and do you as the host want to be notified when your guest arrives at reception? You can also use the Outlook plug-in to create internal notes and a description of the appointment at the time of invitation.

All selected settings are directly transferred to JAMES when your invitation is completed and can be viewed there. An immense saving of time without the need to fiddle with another software and seamlessly integrated into your familiar workflow.

*More information about setting up the JAMES Outlook Plugin can be found in our metaWIKI or under the button below.*

## VOIP / TELEPHONE SYSTEMS / INTERCOM

JAMES can make announcements about tinned speech for certain events.

**The following scenario is a classic case in practice:**

A visitor arrives at the location and scans the QR code at a terminal. The door is then controlled via the access control and an announcement is made via the door intercom: "Please enter. A warm welcome to you!"

A standard SIP trunk is required for interaction with a telecommunications system or intercom system. This varies from manufacturer to manufacturer. If the configuration does not work right away, please contact our support at [support@metasec.de](mailto:support@metasec.de) or your respective system partner.

## ACCESS CONTROL

As an extension to our visitor management solution JAMES, we support the direct interaction with various access control systems.

By connecting these two worlds, both solutions are enormously enhanced.

*By combining functions from JAMES and access control, the following scenarios, among others, can be mapped from the standard:*

- Conversion of JAMES invitations to a keyholder object - i.e. the creation of a guest access including a security profile
- Automatic deletion/deactivation of security profiles on exit
- Automatic printing of badges (access cards) with photo, name, etc.
- Installation of assembly points in case of evacuation (Assembly Point)

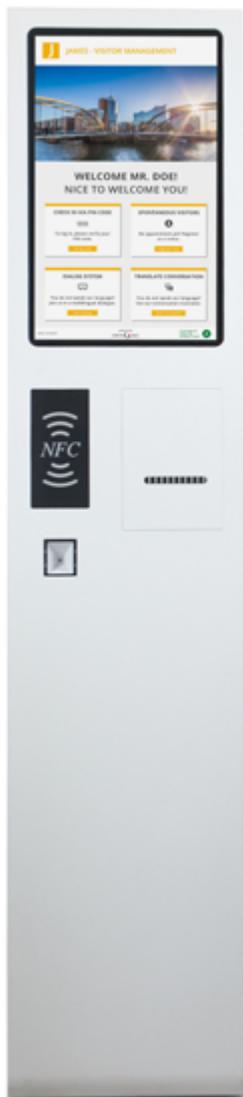
In addition, a wide range of customer-specific enhancements are possible via Customizing. Only the connection between visitor management and access control establishes a complete process for controlling visitor flows within an organization.

In addition, the user benefits from all the other advantages and strengths that each solution already brings in its own right.

## PRINTER

JAMES can automatically issue visitor badges on a printer. For a list of currently supported printers, please contact support.

In order to be able to print visitor badges, a template must be adapted. This template can be edited via the system administration portal.



## INDOOR KIOSK SYSTEM WITH TOUCH FUNCTION FOR SELF CHECK-IN

Receive and greet your visitors in style with the interactive and slim kiosk system. The slim and high-quality design enriches every room - whether foyer, reception or entrance hall. The large touch monitor is perfect for independent check-in with our visitor management software JAMES. You can also easily carry out briefings and training courses here.

A QR scanner is already integrated in the standard system. An NFC scanner or access control reader, as well as a thermal transfer printer, can be optionally installed. In this way, visitor badges can be printed and QR codes read. A considerable advantage for the self check-in of visitors.

**metaSEC Indoor Kiosk system**  
Picture shows equipment variant and may differ from the original

DISPLAY	<ul style="list-style-type: none"> <li>• 21.5" / monitor size 479.8mm x 271.3mm</li> <li>• Full HD resolution for brilliant image display</li> <li>• 10 points Touch function</li> <li>• for interactive touch applications</li> </ul>
PC	<ul style="list-style-type: none"> <li>• Powerful integrated Mini-PC with 4G RAM</li> <li>• Choice of Linux or Windows operating system</li> </ul>
DIMENSIONS	<ul style="list-style-type: none"> <li>• H 1749,8 x B 360 x T 338,1 (mm)</li> <li>• Weight 32,7 kg</li> </ul>
QR-SCANNER	<ul style="list-style-type: none"> <li>• Read mode CMOS / Lighting LED (6000K) 90lux @100mm</li> <li>• resolution 640 x 480 pixel</li> <li>• Scan speed 30 times per second</li> </ul>
OPTIONAL PRINTER	<ul style="list-style-type: none"> <li>• Thermal printing process with a resolution of 576 dpi (8 dots/mm)</li> <li>• Paper width 80 mm, print width 72 mm</li> <li>• max printing speed 150 mm/s</li> </ul>
OPTIONAL NFC / ACCESS CONTROL READER	<ul style="list-style-type: none"> <li>• please ask for corresponding data sheets separately</li> </ul>

## INTEGRATION OF QR-CODE SCANNERS



With our QR Code scanner you get particularly robust and powerful industrial products. These are suitable for mounting in kiosk terminals as well as on doors, gates and barriers (see example picture) or can also be ordered from us in cases.

The QR Code scanners in the box for wall mounting are splash-proof and dust-proof and are already equipped with corresponding QR Code Reader Servers and a PoE splitter. This lightweight yet robust box is very suitable for mounting e.g. in production halls and other production environments.

*Data sheets for the individual QR Code readers or the box can be accessed via the following button.*



Application example: QR-Code reader integrated in a call station at an entrance to open the barrier.



Application example: QR-Code Reader installed in a case for use in a production hall.

## THE LICENSE CONCEPT AT A GLANCE

In order to be able to guarantee exactly the right features and prices for different user needs, we have provided the required base (MZF) with different licenses. The respective expansion stages are essentially based on the number of hosts, i.e. the persons who are to be enabled to invite visitors. This parameter usually also provides a direct indication of the size of the respective company and the amount of visitor traffic, which are important indicators for the respective scope of functions of the license packages.

Further decisive for the choice of the right license are the modules you need for your project. Certain modules require a larger basic version due to complex requirements. Thus it can happen that a larger license must be purchased despite a small number of hosts.

The license level "Project" has a special status. Here the customer has the possibility to customize and individualize the product on almost all levels via the SDK. It is possible to customize the look & feel as well as internal processes. The pricing is also individual and requires a coordination with metaSEC.



### MZF - License M

- The smallest license best suited for small businesses with suitable for a low number of visitors (up to 10 possible hosts). Only a small number of modules can be booked here.



### MZF - License L

- This license is suitable for medium receptions and a larger number of hosts (up to 50 possible hosts). Here you can add an extended number of modules.



### MZF - License XL

- This license is suitable for companies with many visitors and a very high number of hosts (up to 200 possible). You also have the possibility to add all modules here.



### MZF - License ENTERPRISE

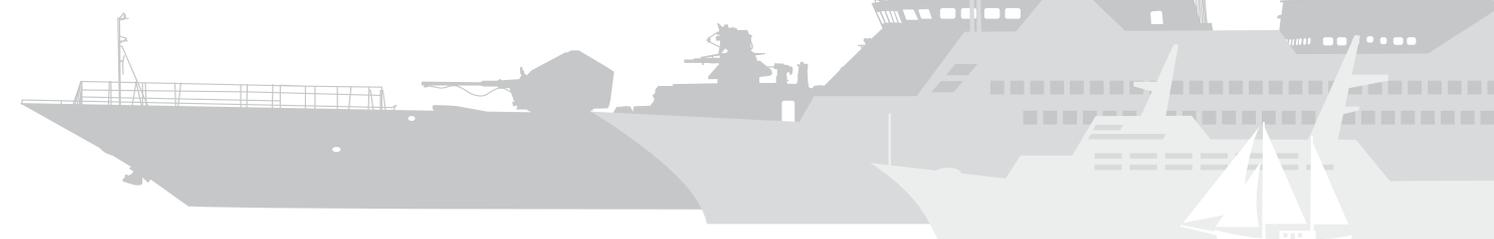
- Suitable for companies with various locations and branches or a large number of visitors or inviting persons (unlimited number of hosts). All modules can be added with this license.



### MZF - License PROJECT

- The right license for all projects and tailor-made solutions that require a certain amount of customizing and access to the maximum range of functions. All modules can be added.

*Use our configuration platform jUniverse to find the right license for you.*



## JUNIVERSE - CONFIGURATION PLATFORM FOR PROCESS MANAGEMENT

The jUniverse is a configuration platform for your customized visitor, logistics or business process and provides you with a comprehensive overview of our JAMES product world. It supports you in your search for a suitable license and gives you a transparent insight into our different license models.

Use our feature configurator to find the right software package for your project based on simple questions. After filling out our questionnaire, jUniverse automatically determines which software modules and resulting licenses you need for your project.

You will also find an overview of all JAMES features, a download area for data sheets and descriptions of our hardware.





## METAWIKI

You need more information and instructions? Then visit our METAWIKI. Here you will always find the latest documentation on our software.



## JUNIVERSE

Discover the jUniverse - the configuration platform for your customized visitor, logistics or business process.

### CONTACT

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