

Lesson 8 – Editing the Cardholder’s Record

Most of the work you will perform on the *Entry-Master*® System will be adding and editing card numbers. Now that you know how to search for and display a cardholder's record you are ready to learn how to modify the record and how to add a new card number.

This lesson teaches you how to do the following:

- Modify information the cardholder's record
- Add a new card number

See Appendix A, *The Cardholder Record Screen*, for a complete description of all fields and functions displayed on the Cardholder Record screen.

Changing data in the Cardholder’s Record

Suppose Natalie Harris bought a new car and got new license plates. To keep the cardholder database up to date, you need to enter the new license plate number in the cardholder record for NATALIE HARRIS.

1. Log into the *Entry-Master*® System as described in Lesson 1.
2. Click on the [Cardholder Search/Edit](#) link.
3. Display the cardholder record for NATALIE HARRIS by;
 - a. entering all or a portion of her last name;
 - b. or by entering her card number.
4. Click on the Go button.
5. Click on the card number for Natalie Harris.

The cardholder record for Natalie Harris displays in the window. Your screen should look like the following:

The screenshot displays the 'Entry-Master System V' interface. On the left is a blue sidebar with a 'Main Menu' containing options like Cardholders, Monitor, Alarms, Open Once, Unlock, Lock, Clear Door, Status, and Video. Below this are 'Reports Menu' and 'Utilities Menu'. The main area shows a cardholder record for 'HARRIS, NATALIE' with Card Number 00534293. Fields include: 1> User's Name: HARRIS, NATALIE; 2> Department: 5720 VOICE NETWORKS; 3> User ID#: 123-45-6789; 4> Lic. Plate: KLA-215; 5> Reg. State: MD - Maryland; 6> Issue Date: 04/17/2008; 7> Expiration: ; 8> Revalidate: ; 9> I/O Status: F - Forgive at; 10> Home Phone: (301) 716-1951; 11> Work Phone: (410) 594-1805; 12> Acc Group 1: 0002 - Reg Employee Access; 13> Acc Group 2: 0005 - Parking Privileges; 14> Acc Group 3: --- No Group Selected ---; 15> Elev Access: 0000 - No Elevator Access; 16> Keypad PIN: ****; 17> Trace and ADA Card checkboxes. A 'Nesting Level Information' section shows Card Level: 0, Violations: 0, and '*** Last Badging ***' with Date: 04/04, Rdr#: 0111, Time: 17:09, Stat: 06. At the bottom, there are buttons for Save, Cancel, Delete, Prev, History, Copy, Next, Back, Print, and Help. The 'Save' button is highlighted with a red box.

Figure 2-8.1 Cardholder Record for Natalie Harris

6. Once the information displays, navigate to the **Lic Plate** field. To do this either:
 - a. press<Tab> until the cursor is positioned in the field;
 - b. or, with your cursor, click several times in the **Lic Plate** field. This highlights the entire text in this field
7. Type over the old number with the new number.
8. Make any other modifications to this record in the same manner. If you have no other modifications to make, click on the Save button and a blank Cardholder screen displays.

Adding a New Card Number

Occasionally you may need to add a new card number. This section shows you how:

1. From the *Entry-Master*® System Main Menu, click on the [Cardholder Search/Edit](#) link

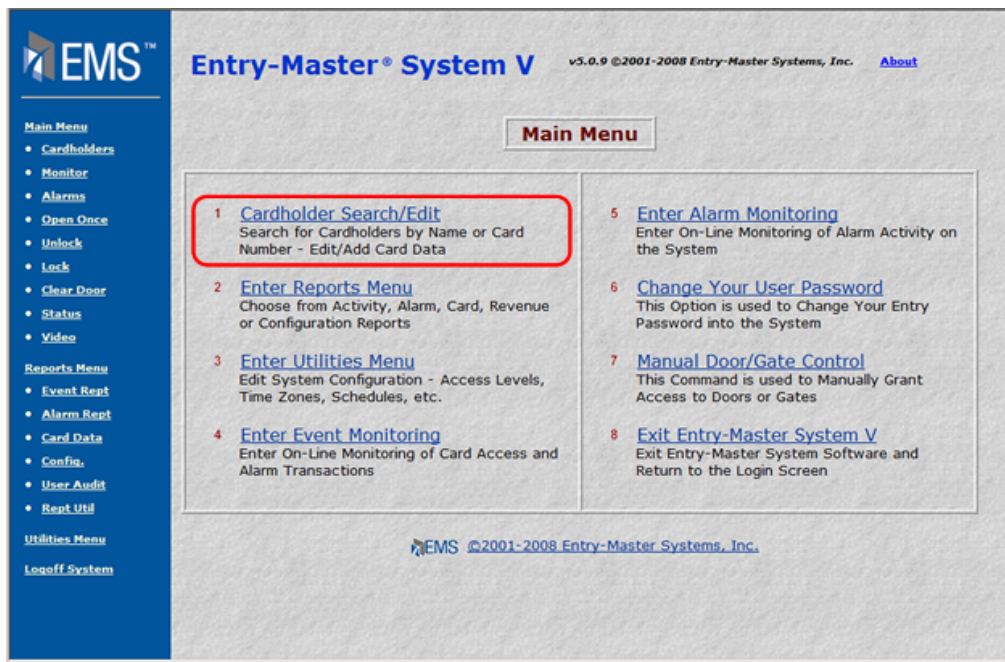


Figure 2-8.2 Cardholder Window

2. The *Entry-Master*® System Search Screen displays.

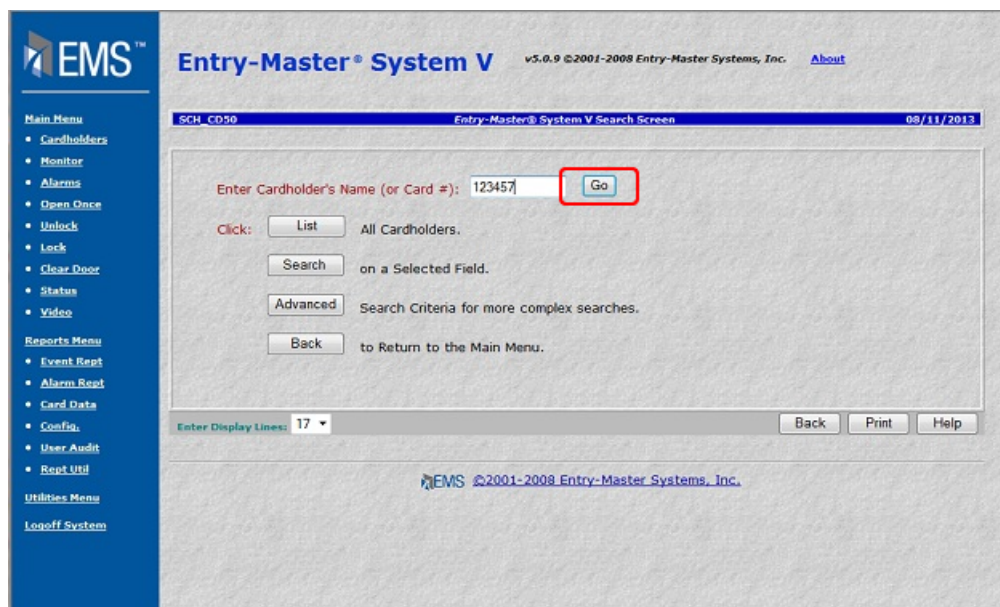


Figure 2-8.3 Cardholder Search Screen

3. The cursor is positioned in the **Enter Card Name (or Card #)** field. Enter 123457 in this field then click on the Go button.
4. A blank Cardholder Record Screen displays.

The screenshot shows the 'Entry-Master System V' interface. At the top, it displays 'v3.0.9 ©2001-2008 Entry-Master Systems, Inc.' and 'About'. The main area is a form for a cardholder record. The Card Number is 00123457. The User's Name field is currently blank with a blinking cursor. Other fields include Department, User ID#, Lic. Plate, Reg. State (set to 'No State Selected'), Home Phone, Work Phone, and three Access Groups (all set to 'No Group Selected'). There are also fields for Issue Date (05/23/2003), Expiration, Revalidate, I/O Status (F - Forgive), Keypad PIN (N/A), and checkboxes for Trace and ADA Card. A 'Nesting Level Information' section shows Card Level: 0 and Violations: 0, with a 'Last Badging' message. At the bottom, there are buttons for Save, Cancel, Delete, Prev, History, Copy, Next, Back, Print, and Help. A 'User's Notes' field is also visible.

Figure 2-8.4 Blank Cardholder Record Screen

- The cursor is blinking in the **User Name** field. This lesson will take you through this screen quickly.

For more information about the fields in this screen see Appendix A, *The Cardholder Record Screen*, or the lessons that cover some of the specific fields. For example, Lesson 5 describes time zones and Lesson 6 describes access levels.

- Type LONG, JEANNE into the **User's Name** field and press <Tab>. The cursor moves to the Department field.
- Always enter the **LAST** name first and the **FIRST** name last. Separate the **LAST** and **FIRST** name by a comma and a space. Also, you can use upper or lower case to type in any entries. The *Entry-Master*® System converts all text to upper case after you leave the field.
- In the **Department** field enter **SALES** and press <Tab>. The cursor moves to field to the **User's ID#** field.
- The User's ID# field is the user's employee number or social security number. Type **224-38-1234** and press <Tab>. The cursor moves to the **Lic. Plate** field 4.

Important Note... The dashes in the social security number are not required, but make the number easier to read. If the social security number is always used for this field, the system can be configured to automatically insert the dashes.

- Enter **XYZ-877** into the **Lic. Plate** field. The dash is not required.
- The next field, **Reg. State**, has a drop-down list of all the states. There are two ways to display a drop-down list and make a selection:

- a. You can click on the down arrow in this field to display all possible states.
- b. You can press the <Tab> key from a previous field, then use the up and down arrows on your keyboard to make a selection. In this case, once you highlight your selection, press the <Enter> key. The *Entry-Master*® System leaves your selection in the field then moves to the next field.

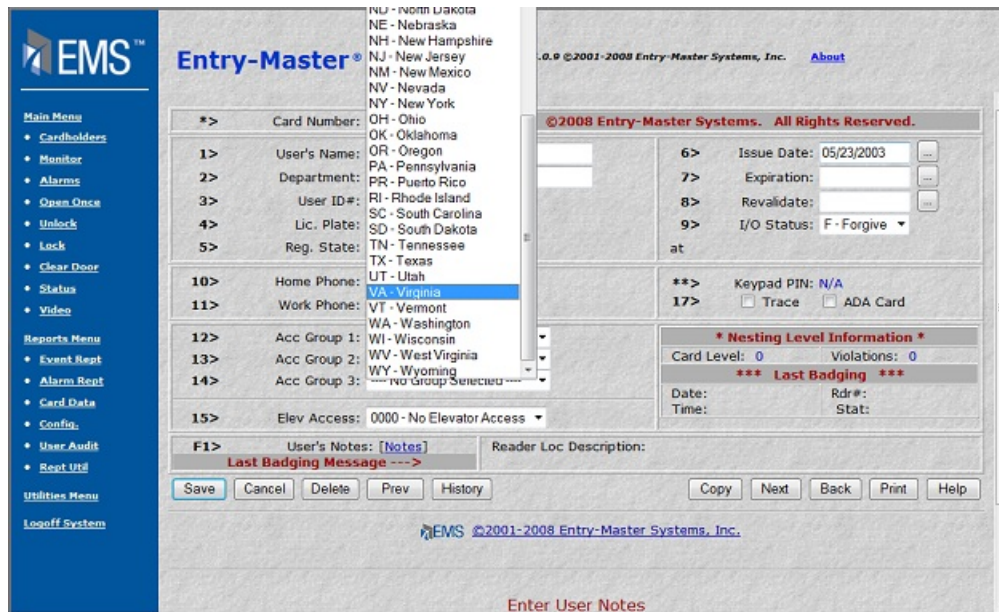


Figure 2-8.5 Registration State Drop-Down List

12. Notice that the current date is already filled in by the *Entry-Master*® System. Normally you will not change this date unless for some reason the date you issue the card is not the same as the date you are adding the card to the system. For example, to change the date to June 20, 2003, type **062003** and press <Tab>. The cursor moves to the **Expiration** date field.

Note... The slashes are not required when entering a date and if you do not specify a year, the *Entry-Master*® System uses the current year.

13. Enter the **Expiration** date in the same manner as the **Issue** Date. This card will be valid for 6 months, so add six months to the Issue Date and type in the result in the Expiration date field. Press <Tab>. Notice that the *Entry-Master*® System put the slashes in the date.
14. Do not enter a **Revalidate** date unless you wish the card to be revalidated **automatically** on a particular date. We do not want the card to revalidate, so just press <Tab>.
15. The **I/O Status** field is also contains a drop-down list as shown in the following figure. All new cards are typically set to **Forgive**. If the passback feature is utilized on your

system, then the first time the card is used the I/O status will change. See Lesson 10, *Forgiving Cardholders* for more information about the Forgive I/O status.

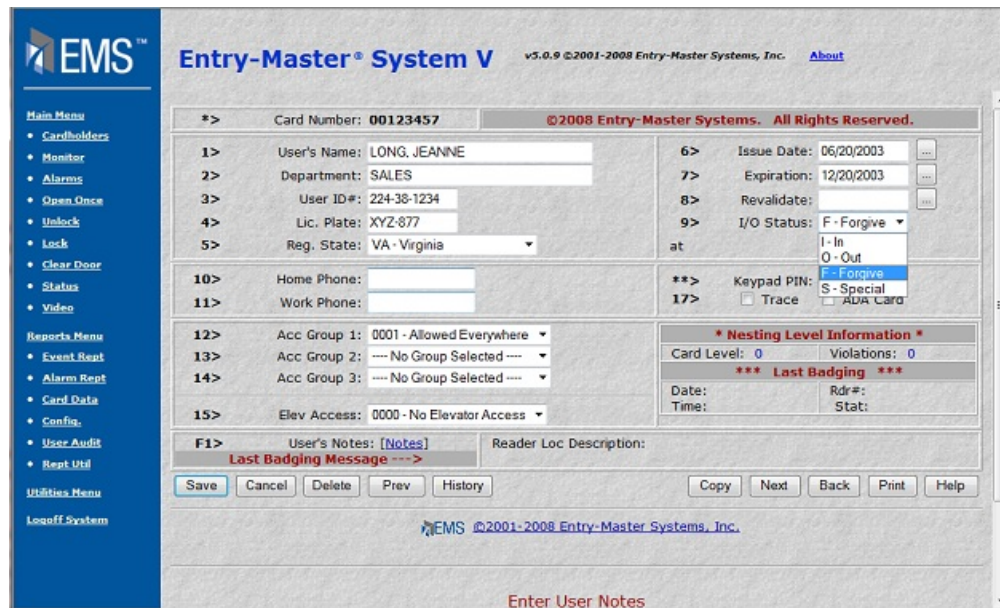


Figure 2-8.6 I/O Status Drop-Down List

16. Press <Tab> to move to the **Home Phone** field. Type **7035555488** and press <Tab>. Notice that the *Entry-Master*® System has inserted the proper characters to make the number read "(703) 555-5488". The cursor moves to the **Work Phone** field.
17. In the **Work Phone** field, enter **5553322**. When you press <Tab>, the default area code is automatically inserted. If the area code were different, you could type it in as well.

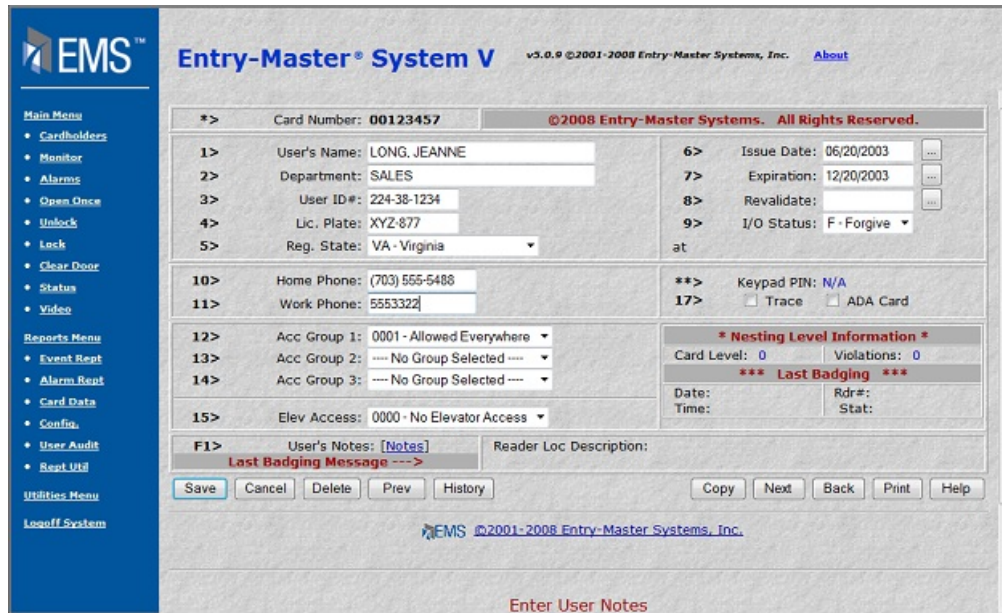


Figure 2-8.7 Formatting the Phone Number Fields

Note... The default area code can be configured for each telephone field. Contact your *Entry-Master®* dealer to configure these fields.

- In the **Acc (Access) Group 1** field, display the drop-down list and select **0002 – Front & Conference**.

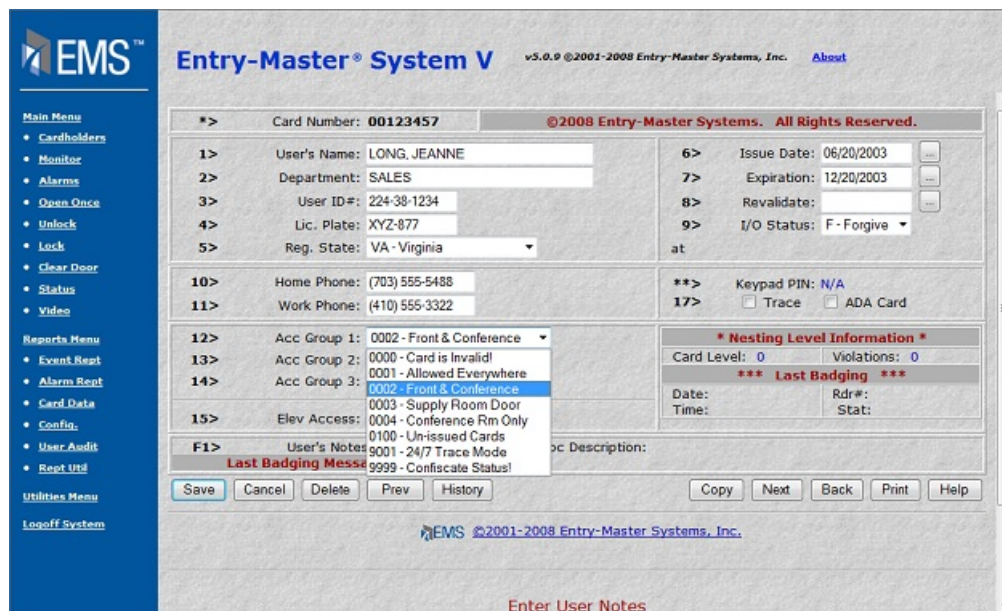


Figure 2-8.8 Access Group Drop-Down List

- Leave the default **0** in the **Elev (Elevator) Access** field. For this example, no elevator access is defined.

20. In the **Trace (Y/N)?** field, **No** is already selected. For this example no activity trace is desired therefore no entry is necessary. Had we changed the entry to Yes, then every time this card was used, an alarm message would appear on the Monitoring Screen(s).
21. Scroll down to view the **User's Notes** field. This area is for you to enter special information about the user that is not asked for on the Cardholder Record screen. You can type any details you wish. The following screen illustrates an entry in the **User's Notes** field.

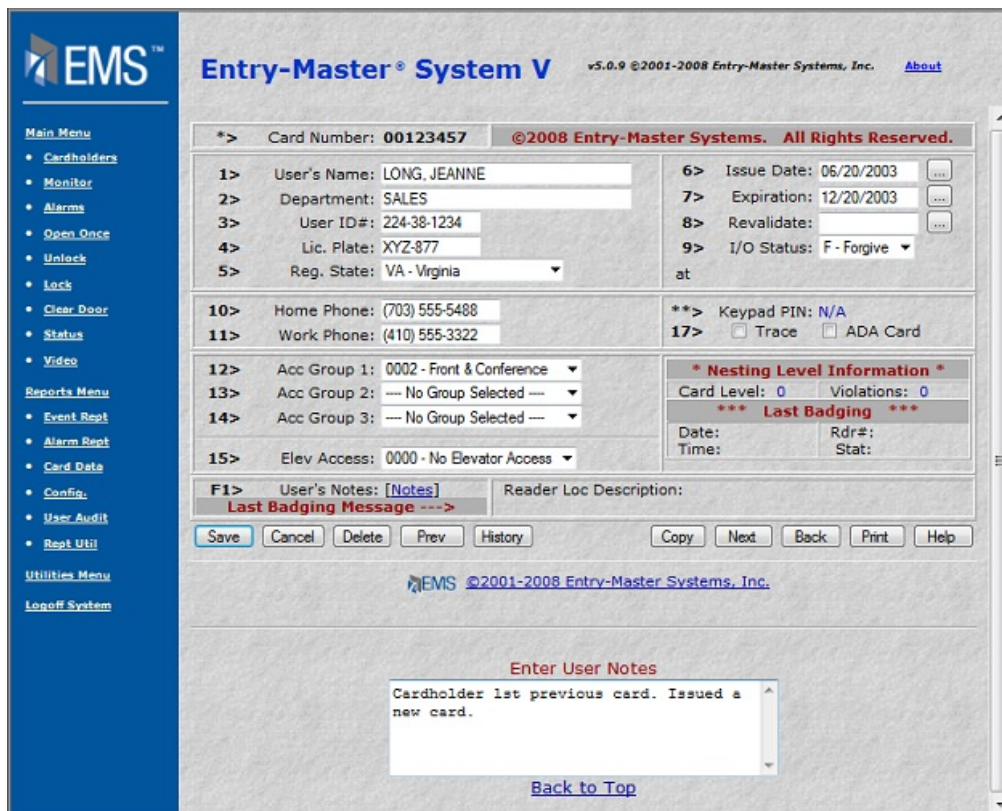


Figure 2-8.9 Sample User Notes

Your screen should reflect all the entries as shown in the next figure.

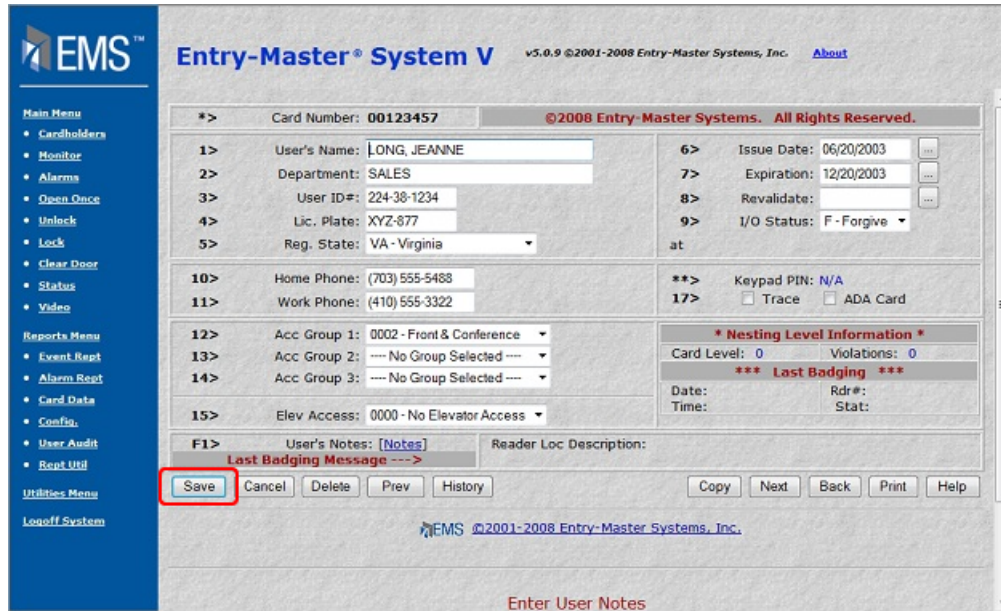


Figure 2-8.10 Cardholder Record Screen Completed

22. When you press the Save button, your record is saved and the *Entry-Master®* System returns you to the Search Screen.

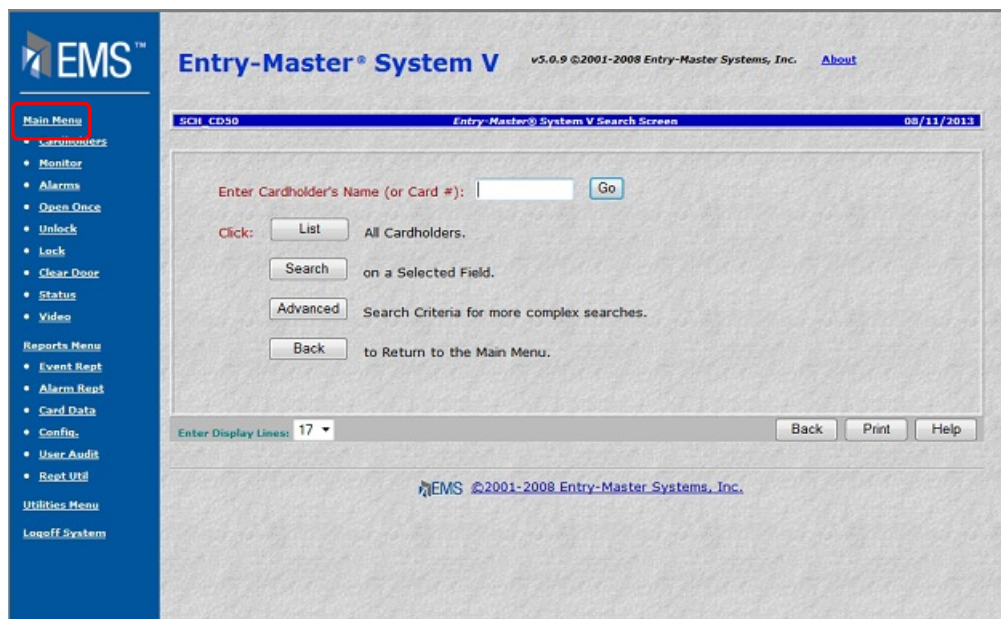


Figure 2-8.11 *Entry-Master®* System Search Screen

When ready, you can click on the **Main Menu** link to return to the *Entry-Master®* System Main menu.

Important Note... The only fields that are necessary to a cardholder record are the I/O Status and the Acc. Group 1.

Without these two fields, a cardholder will never be granted access to any readers.

Copy an Existing Cardholder Record:

If an existing cardholder record has data that is very similar to what you need for a new cardholder record, you may choose to duplicate this record, which saves you from entering data into all the fields. It is important to remember that you cannot copy to an existing record. If this is attempted, the system will display a dialog box instructing you first to delete the existing record.

1. Display the Cardholder record that you wish to copy.

The screenshot displays the 'Entry-Master System V' interface. The main window shows a cardholder record for 'BAKER, KEVIN W' with Card Number 07701150. The record includes fields for User's Name, Department (ENTRY-MASTER, LLC), User ID#, Lic. Plate (YGC-044), Reg. State (MD - Maryland), Issue Date (03/11/2012), Expiration, Revalidate, I/O Status (F - Forgive), Home Phone, Work Phone, Keypad PIN (****), Trace, and ADA Card options. It also shows Access Groups (0005 - Master Access Group) and Elevator Access (0000 - No Elevator Access). A 'Nesting Level Information' section indicates Card Level 0 and 0 violations, with a 'Last Badging' message dated 06/25 at 21:20. The 'Copy' button is highlighted with a red box.

Figure 2-8.12 Original Cardholder Record

2. Click the Copy Button and the following window displays.

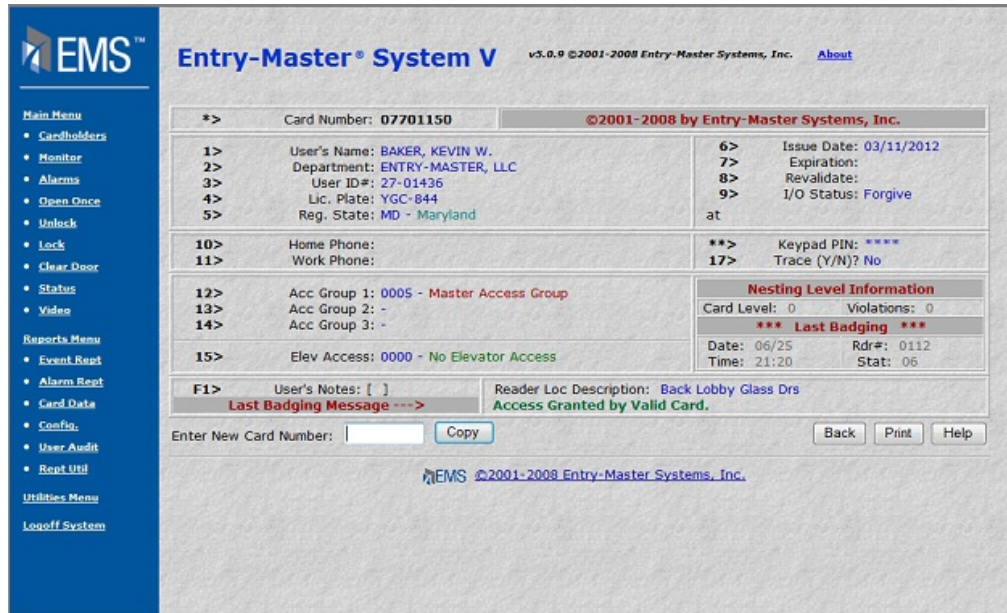


Figure 2-8.13 Enter a New Card Number

3. In the **Enter New Card Number** field, enter the 8-digit number printed on the new card.
4. Click on the Copy button and the following message displays:

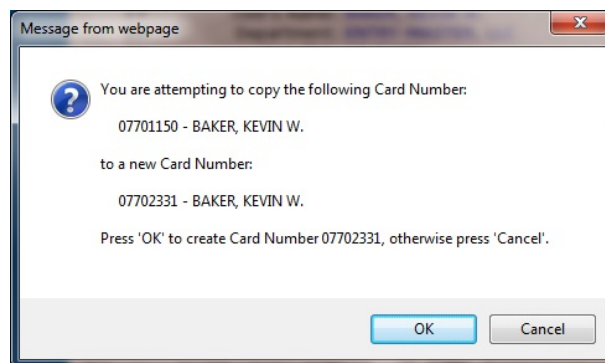


Figure 2-8.14 Copy Message

5. Click on OK to continue or Cancel to stop this process. When you click on OK, the *Entry-Master*® System confirms that the new card number you typed does not currently exist in the Cardholder database.

Important Note... If you had entered a card number assigned to an existing cardholder record, you must delete the record before you can continue. The *Entry-Master*® System will not let you accidentally copy over existing records.

- a. If this card number already exists in the database, the following message appears:

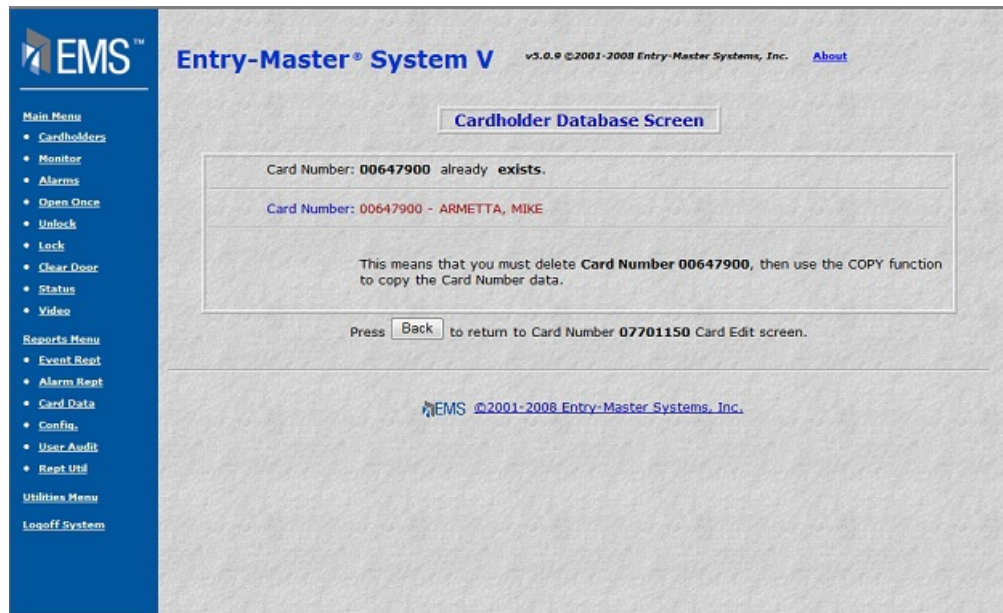


Figure 2-8.15 Existing Card Number Message

- b. Click on the Back button to return to the original cardholder's record.
- 6. If the number does not exist, a copy of the original cardholder's record appears for you to alter accordingly.

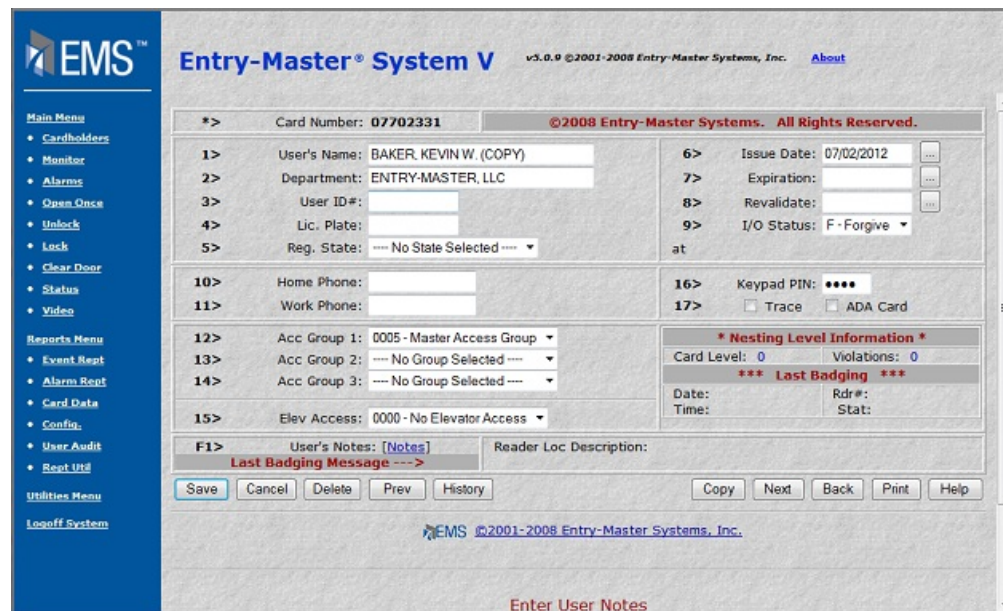


Figure 2-8.16 Copied Cardholder Record with New Entries

- 7. Type over any information that you need to change then click on the Save button.
- 8. Once the record is saved, the Search Screen redisplay.

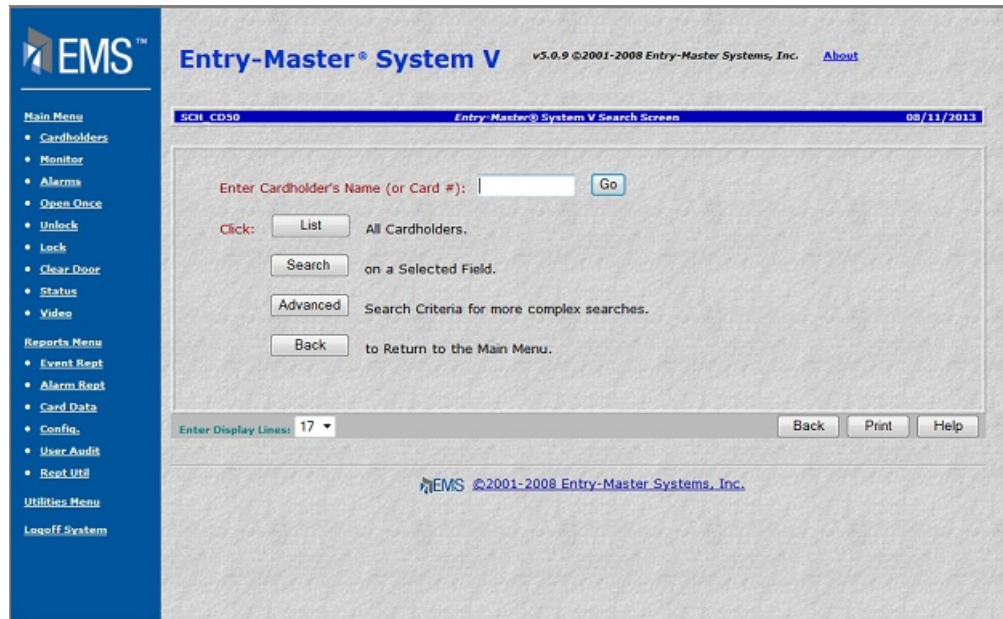


Figure 2-8.17 The *Entry-Master*® System Cardholder Search Screen

This lesson taught you how to modify specific fields in the cardholder record and how to add a new card number. The purpose of this lesson was to get you familiar with moving around the cardholder record screen.

Proceed to Lesson 9, *Batch Updating Cards*.