

Lesson 9 – Batch Updating Cards

The batch update feature of the *Entry-Master*® System provides several ways to update cards. They are:

- **Batch Update by Card Number** – Use this function to update a group of existing card numbers.
- **Batch Update by Selected Field** – Use this function to update a group of existing cards based upon the contents of a specific field.
- **Batch Add Card Numbers by Card Number** – Use this function to add a group of new cards to the database.
- **Batch Update Inactive Card Users** – Use this function to make changes to inactive card users.

This lesson teaches you how to perform several of these functions.

A VERY IMPORTANT NOTE: Running any Batch Update function permanently changes your data. Entry-Master Systems, Inc. recommends that you back up your cardholder data before performing a Batch Update. Once you run any Batch Update function, the only way to retrieve your original data is to revert to a back up of your data.

Batch Add Cards by Card Number (for new cardholders)

Usually, your *Entry-Master*® System dealer provides more than enough cards for each site. However, occasionally you may need to add an additional group of cards. Log into the *Entry-Master*® System as described in Lesson 1.

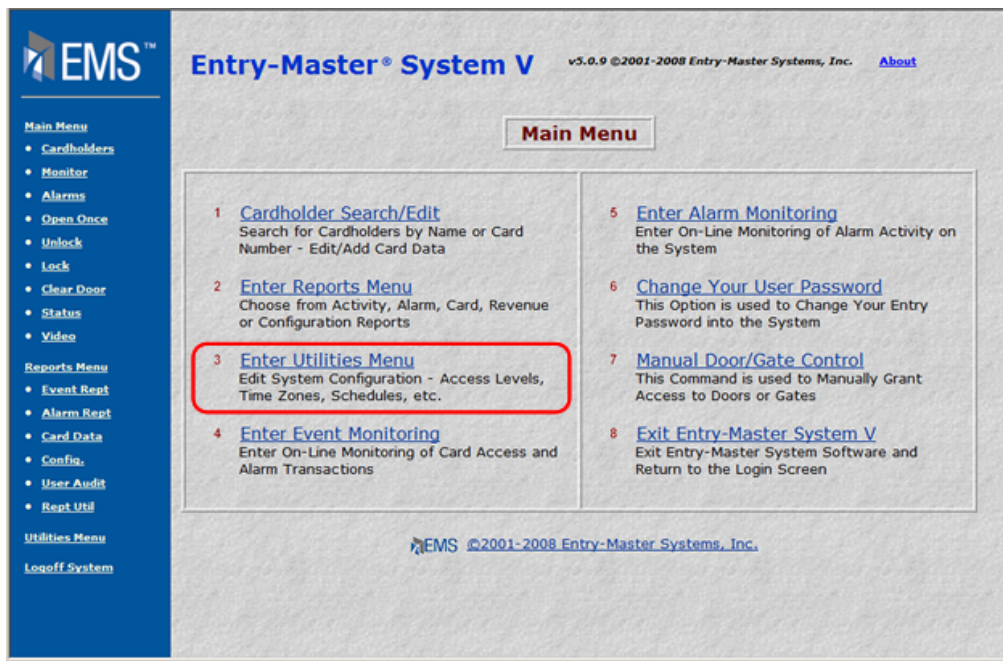


Figure 2-9.1 The Entry-Master® Main Menu

Click on [Utilities Menu](#) link on the *Entry-Master®* System Main Menu. The Utilities Menu displays as shown in the following illustration:

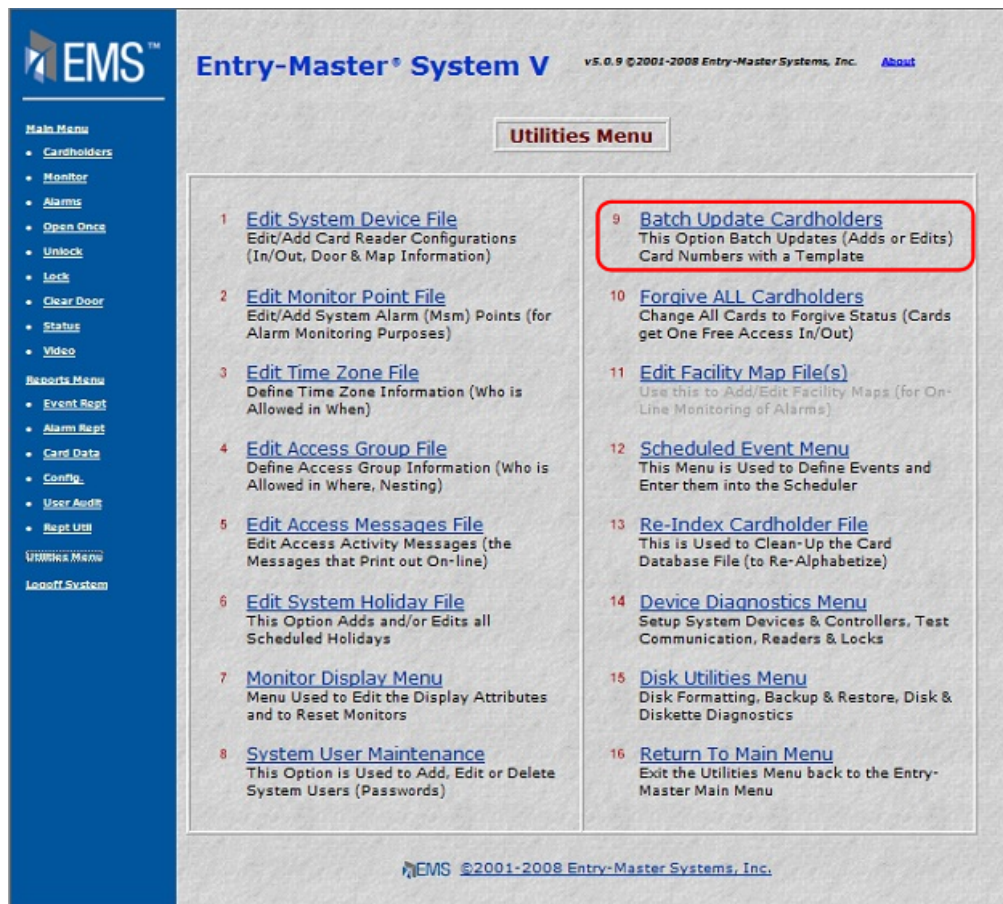


Figure 2-9.2 The Utilities Menu

Click on the [Batch Update Cardholders](#) link to display the Batch Update Cardholder Menu.

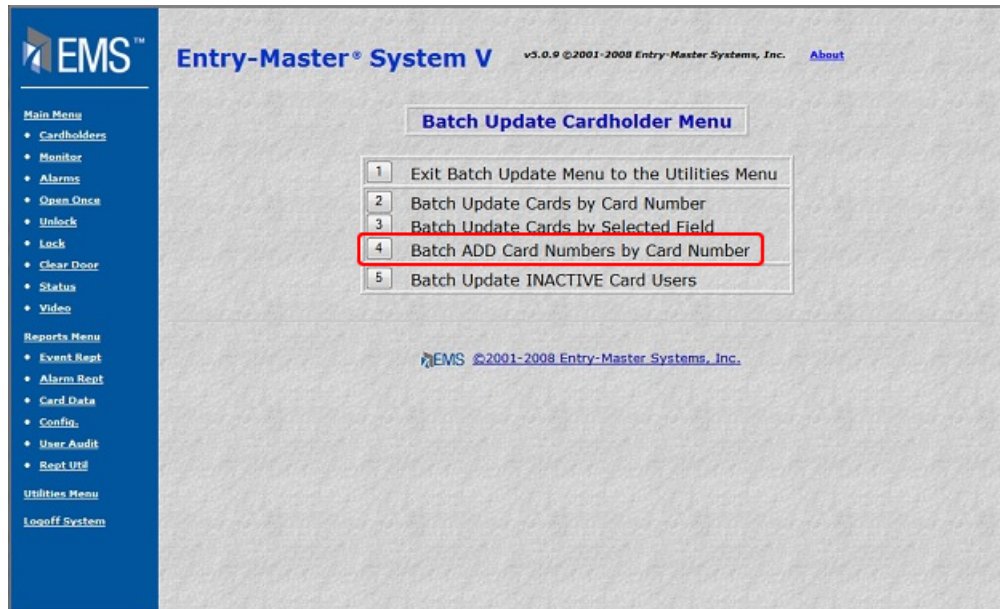


Figure 2-9.3 Batch Update Cardholder Menu

Click on the [Batch ADD Card Numbers by Card Number](#) link and the screen as shown next displays.

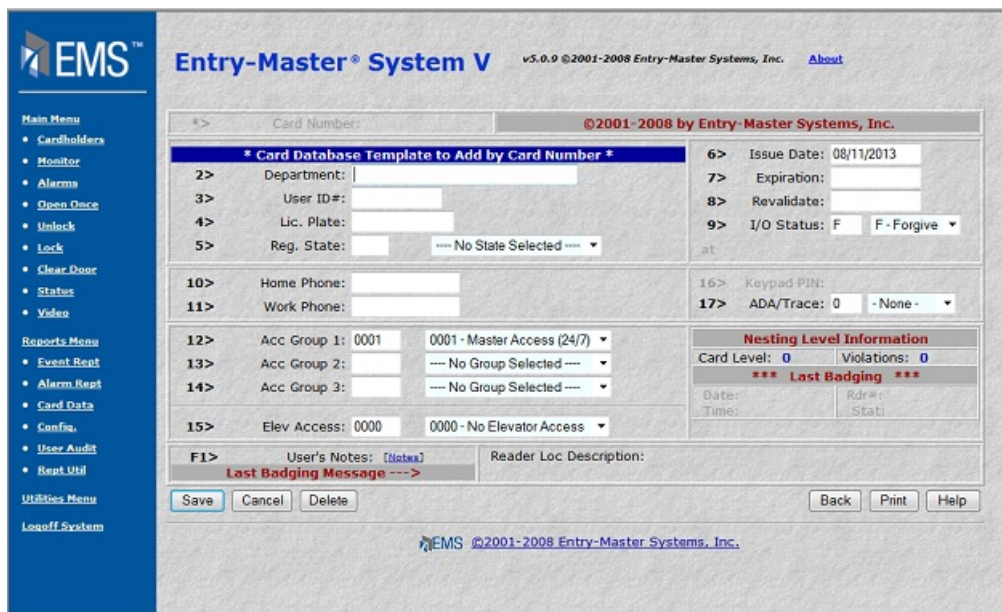


Figure 2-9.4 Batch Add Cards by Card Number

When this screen displays you can edit all or some of the fields. For example, we are going to add a group of cards to a new department that has been added to the facility. This department will be Technical Support.

Remember that you can use the <Tab> key or the mouse to move from field to field.

1. Type **Technical Support** in the **Department** field.
2. Type **05/01/2003** for **Issue Date**.
3. The **Expiration Date** for these cards will be December 31, 2004. Type **123101** in this field. When you press <Tab>, notice that the date is now shown as 12/31/2001.
4. All new cards are typically set to **Forgive**. Select **Forgive** from the **I/O Status** drop-down list. If your system utilizes the passback feature, then the first time the card is used the I/O status will change. See Lesson 10, Forgiving Cardholders, on page 98 for more information about the Forgive I/O status.
5. These cardholders will be allowed Master Access (Access Group 0001) of the facility. Select this access group from the drop-down list in the **Acc Group 1** field.
6. The **Elevator Access** should be **0000**.
7. If necessary, select **No Trace**. The template should look like the following figure.

Important note: When you "batch add" cards, you are required to enter at least an I/O Status and an Access Group 1 on the Card Template Screen.

If you do not define at least an I/O Status and an Access Group 1, then the Entry-Master® Software assumes that the access group is invalid (0000) and assigns a "Confiscate Card" status to all your cards.

The screenshot shows the 'Entry-Master System V' interface. The main window is titled '* Card Database Template to Add by Card Number *'. It contains several fields for card configuration:

- 2> Department: TECHNICAL SUPPORT
- 3> User ID#: [empty]
- 4> Lic. Plate: [empty]
- 5> Reg. State: [empty] (No State Selected)
- 6> Issue Date: 05/01/2003
- 7> Expiration: 12/31/2004
- 8> Revalidate: [empty]
- 9> I/O Status: F (Forgive)
- 10> Home Phone: [empty]
- 11> Work Phone: [empty]
- 12> Acc Group 1: 0001 (0001 - Master Access (24/7))
- 13> Acc Group 2: [empty] (No Group Selected)
- 14> Acc Group 3: [empty] (No Group Selected)
- 15> Elev Access: 0000 (0000 - No Elevator Access)
- 16> Keypad PIN: [empty]
- 17> ADA/Trace: 0 (None)

At the bottom, there are buttons for 'Save', 'Cancel', and 'Delete'. The 'Save' button is highlighted with a red box. A 'Nesting Level Information' box shows 'Card Level: 0' and 'Violations: 0'.

Figure 2-9.5 Batch Add Cards by Card Number

8. Click on the Save button to start the update process. The following screen displays:

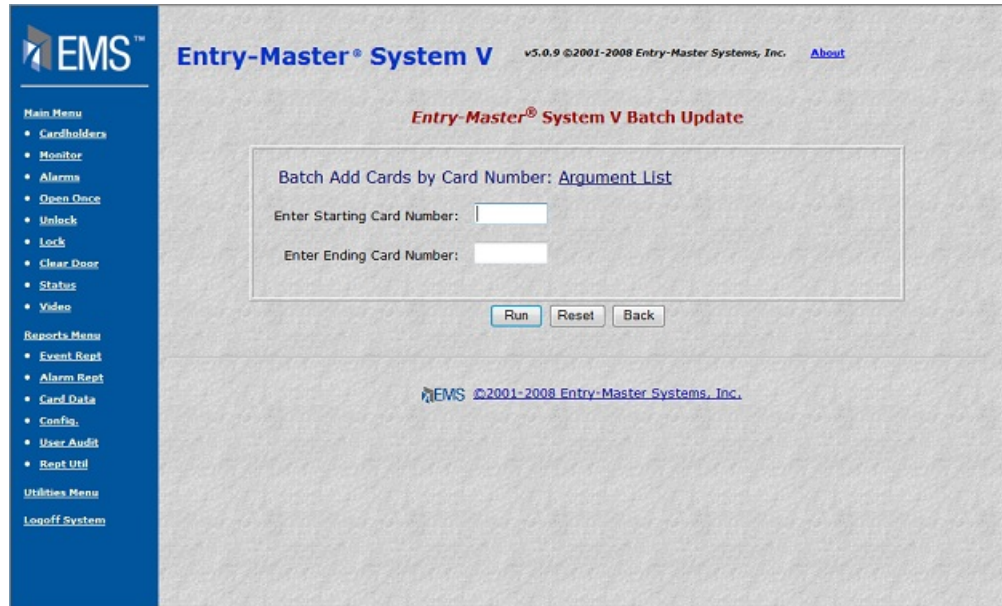


Figure 2-9.6 Batch Card Update Screen

9. We will add 3 cards, 223460 through 223462. **223460** is the **Starting Card Number** and **223462** is the **Ending Card Number**.
10. Click on the Run button and a processing message displays.

This message confirms that the cards have been added to the database. When the process is complete, the system returns you to the **Batch Update Card Selection Menu**. You can edit each of the cards individually or you can click the [Batch Update Cards by Card Number](#) link to update another group of cards.

Batch Update by Card Number (for existing cardholders)

To batch update cards by card number, log into the *Entry-Master*® System as described in Lesson 1 on page 18. The *Entry-Master*® Main Menu should be displayed on the computer screen as shown next.

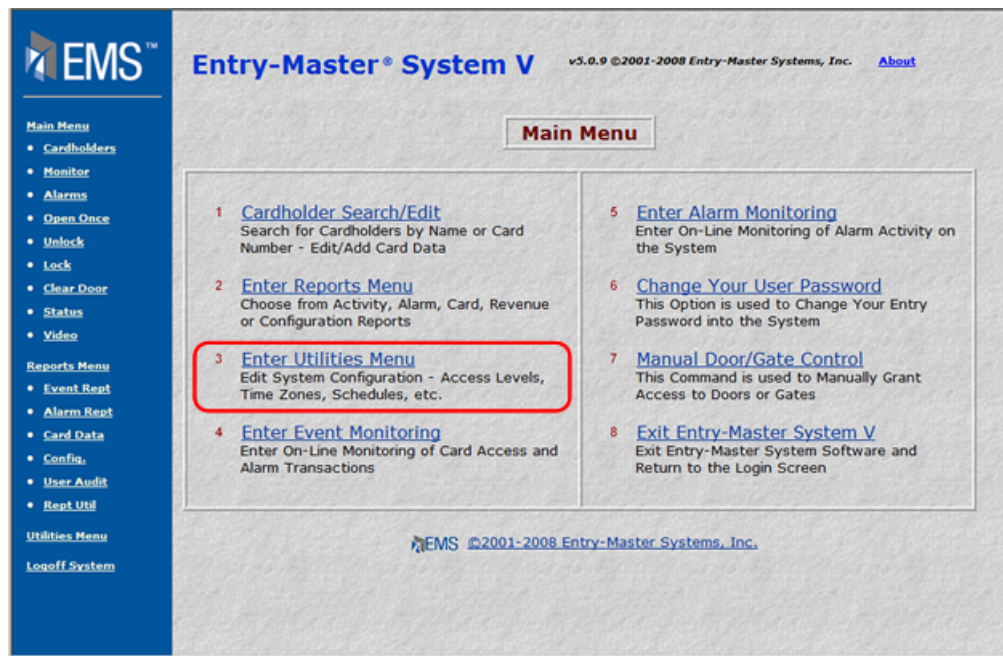


Figure 2-9.7 The Entry-Master® System Main Menu

Click on the [Enter Utilities Menu](#) link and the following displays on the screen:

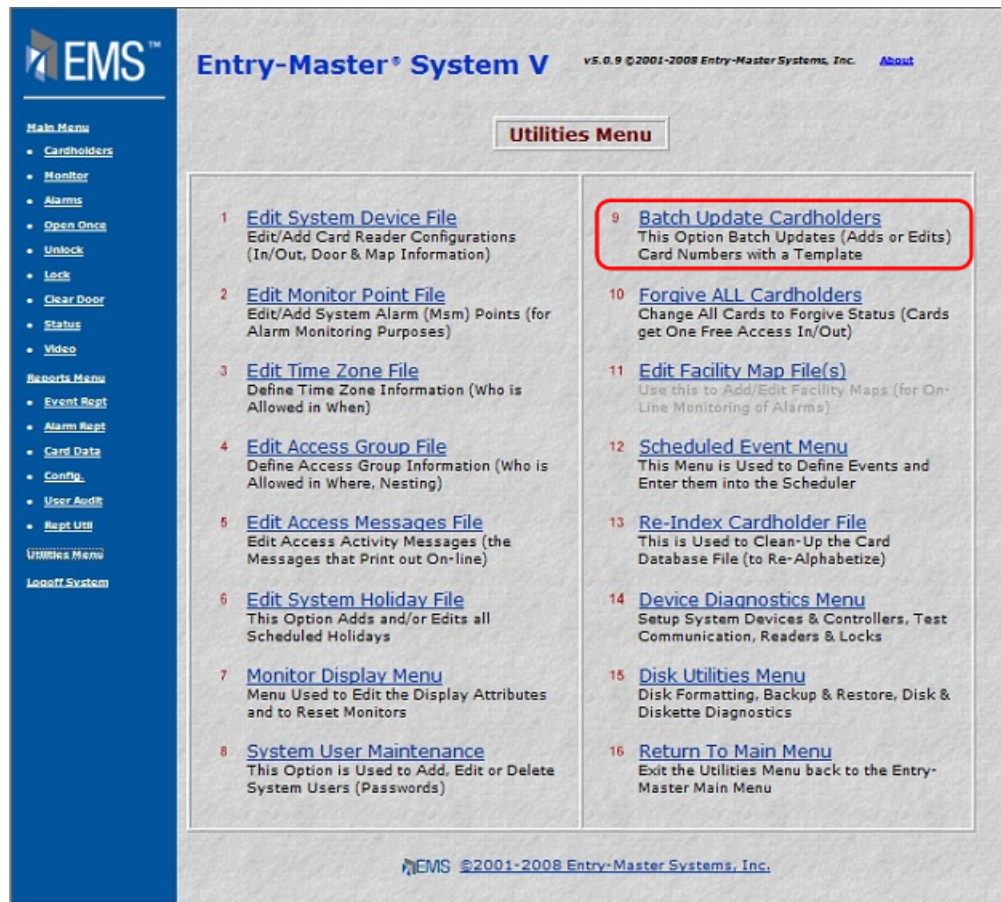


Figure 2-9.8 The Utilities Menu

Click on the [Batch Update Cardholder](#) link and the Batch Update Cardholder Menu displays next:

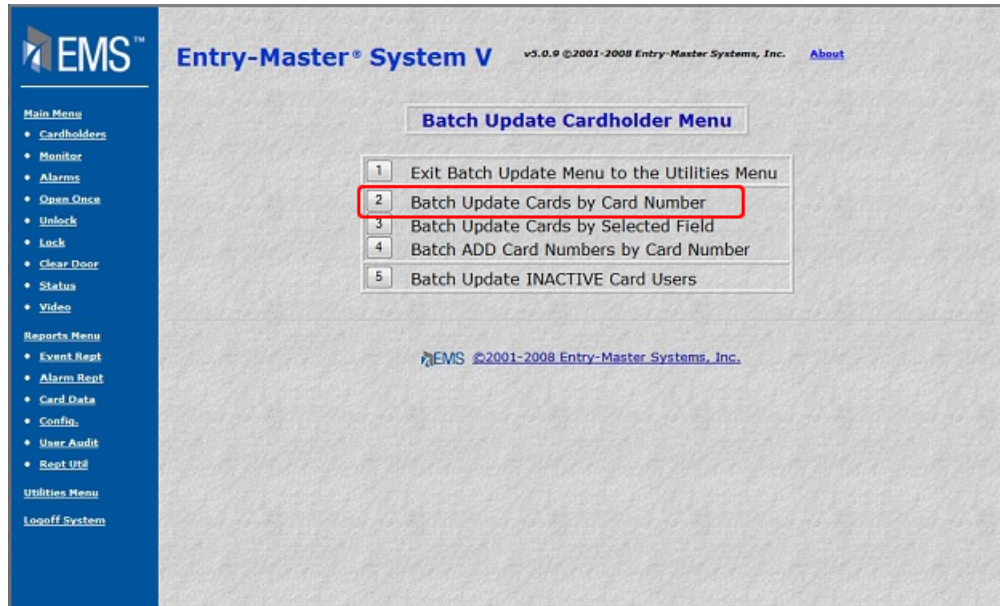


Figure 2-9.9 Batch Update Cardholder Menu

This is the Batch Update Cardholder Menu. Click on the [Batch Update Cards by Card Number](#) link to display the Batch Update Cards by Card Number Screen.

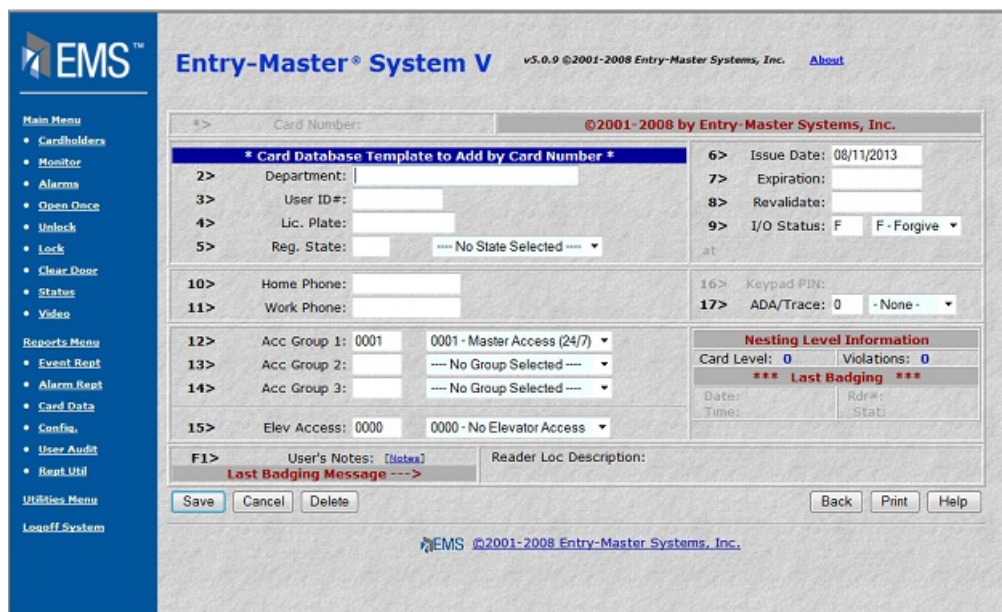


Figure 2-9.10 Batch Update by Card Number

1. You can enter information in every field or in some of the fields. In this example, you will change the I/O Status for cards numbered from 223460 to 223462. Click in the **I/O Status** field. Select **Special** from the drop-down list.
2. Click on the Save button and the following screen displays.

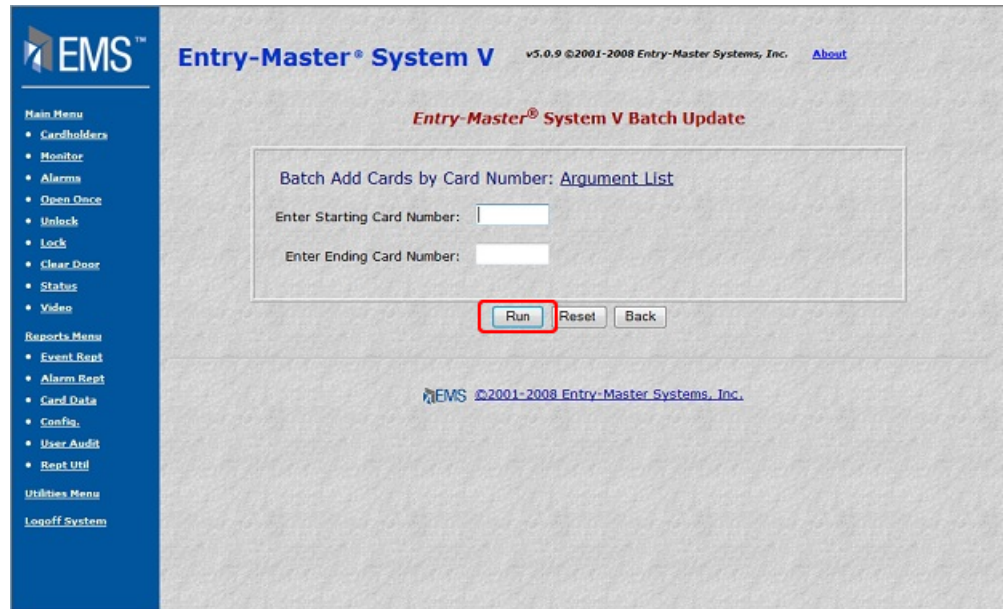


Figure 2-9.11 Starting Card Number Prompt

3. **Enter Starting Card Number 223460.**
4. **Enter Ending Card Number 223462.**
5. Click on the Run button to begin the update.

The names of all the cards that have been updated will quickly scroll on the screen. Next, a message telling you that the update operation is finished displays. When the update operation is finished, the Batch Update Cardholder Menu redisplay.

Batch Update Cards By Selected Field (for existing cardholders)

Suppose you want to define Access Group 2 for all cardholders who are employed by the Data Processing Department. Log into the *Entry-Master*® System as described in Lesson 1 on page 18. The *Entry-Master*® System Main Menu should be displayed on the computer screen as shown next.

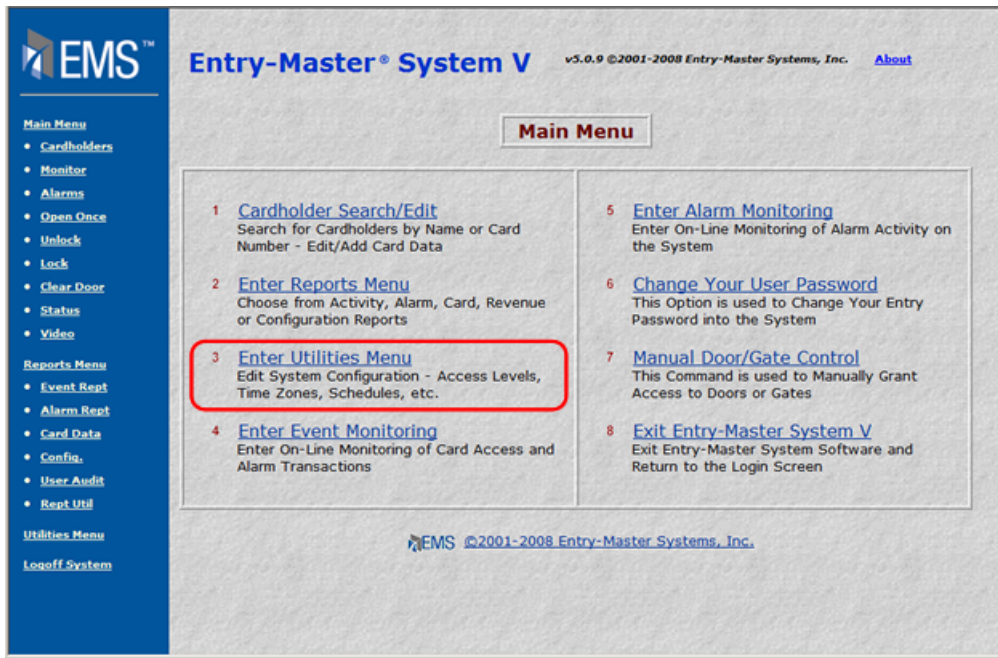


Figure 2-9.12 The *Entry-Master*® System Main Menu

Click on the [Enter Utilities Menu](#) link and the following screen displays:

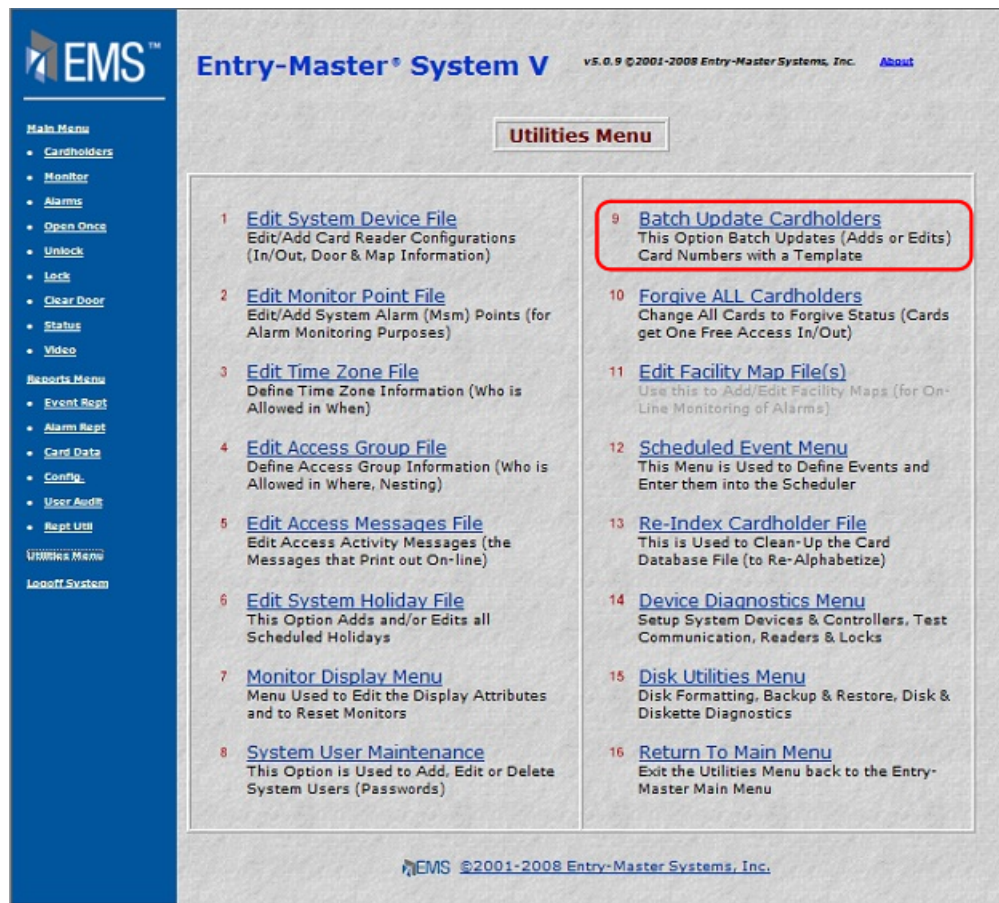


Figure 2-9.13 The Utilities Menu

Click on the [Batch Update Cardholders](#) link and the Batch Update Cardholder Menu displays.

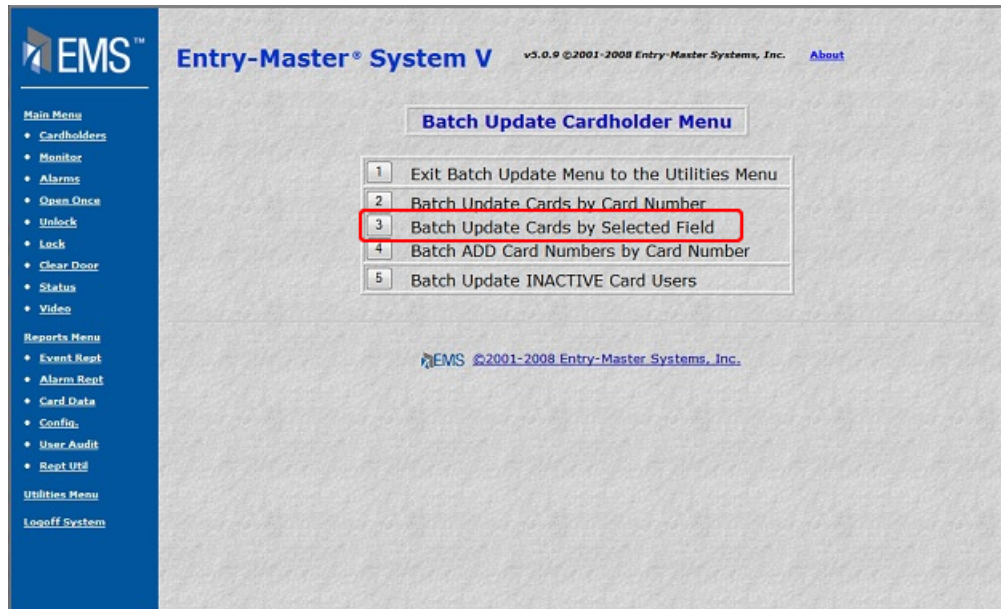


Figure 2-9.14 The Batch Update Card Selection Menu

Click on [Batch Update Cards by Selected Field](#) to display the following screen:

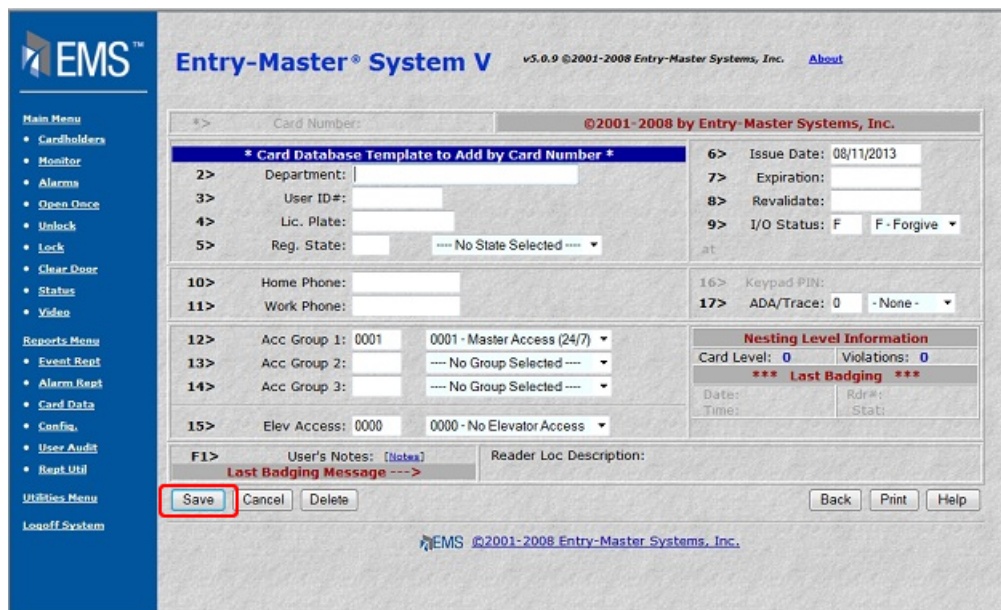


Figure 2-9.15 The Card Template Screen

1. Click in the **Acc Group 1** field to display a list of Access Groups. Select an access group from the drop-down list. In this example, access group **0002** defines Regular Employee Access.
2. Click on the Save button and a selection menu displays next.

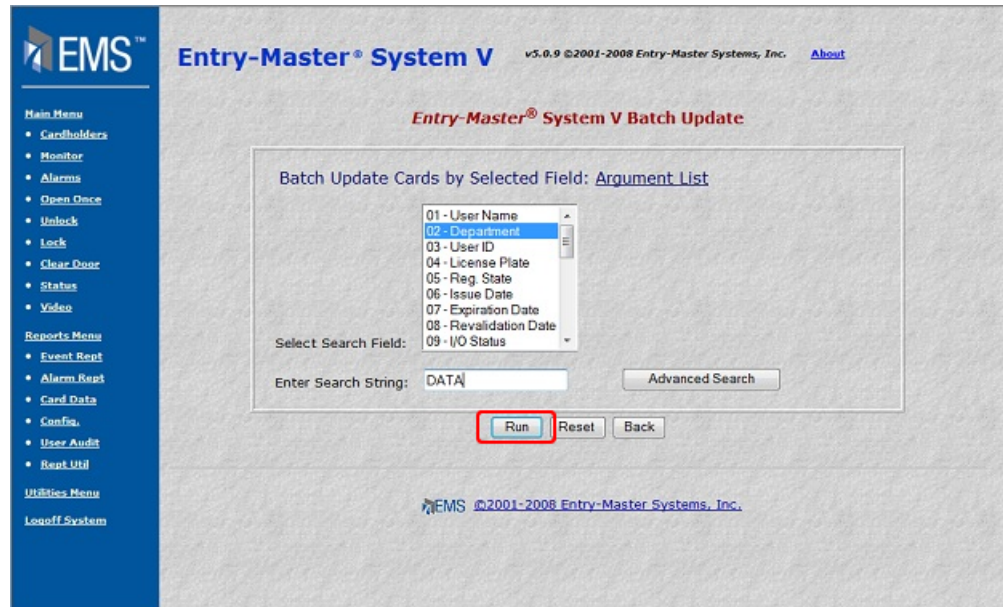


Figure 2-9.16 Batch Card Edit Field Selection Menu

3. Click on the **Department** radio button.
4. In the **Enter Search Value** field, type **DATA**. Note that **DATA** is just a portion of the Department name. You do not need to enter the entire department name. However, keep in mind that doing so will update all Department names that contain DATA.
5. Click on the Run button and a message telling you how many records were updated displays.
6. When the update is complete, the Batch Update Cardholder Menu redisplay.

Batch Update Inactive Cardholders

The same screens display for this feature as the other Batch Update features except it specifically affects cardholder records based on the date the cardholder last used the card. Typically, you use this to batch update cards that have not been used for a period of time.

You may now proceed to Lesson 10, *Forgiving Cardholders*.