

## Lesson 7 – Searching for a Cardholder's Record

The Entry-Master cardholder search function allows you to locate a specific card number or cardholder using the following features:

- Enter Cardholder's Name (or Card #)
- List All Cardholders
- Search on a Selected Field
- Search Criteria for More Complex Searches

Lessons pertaining to cardholders and cardholder data will use fictitious names, card numbers, and/or company names from the Entry-Master Demonstration Database. To work through these lessons you will need to replace sample data (Names, Card Numbers, etc.) with real data in your existing system.

Once you locate the card number or cardholder, you can view and make changes to the record associated with the card number or cardholder. This lesson teaches you how to use all the listed search features.

Navigate to the *Main Menu* and click on **Option 1 – Cardholder Search/Edit** (see **Figure 2-7-1** below). If you are not logged in and need help, see [Lesson 1 – Logging into the System](#).

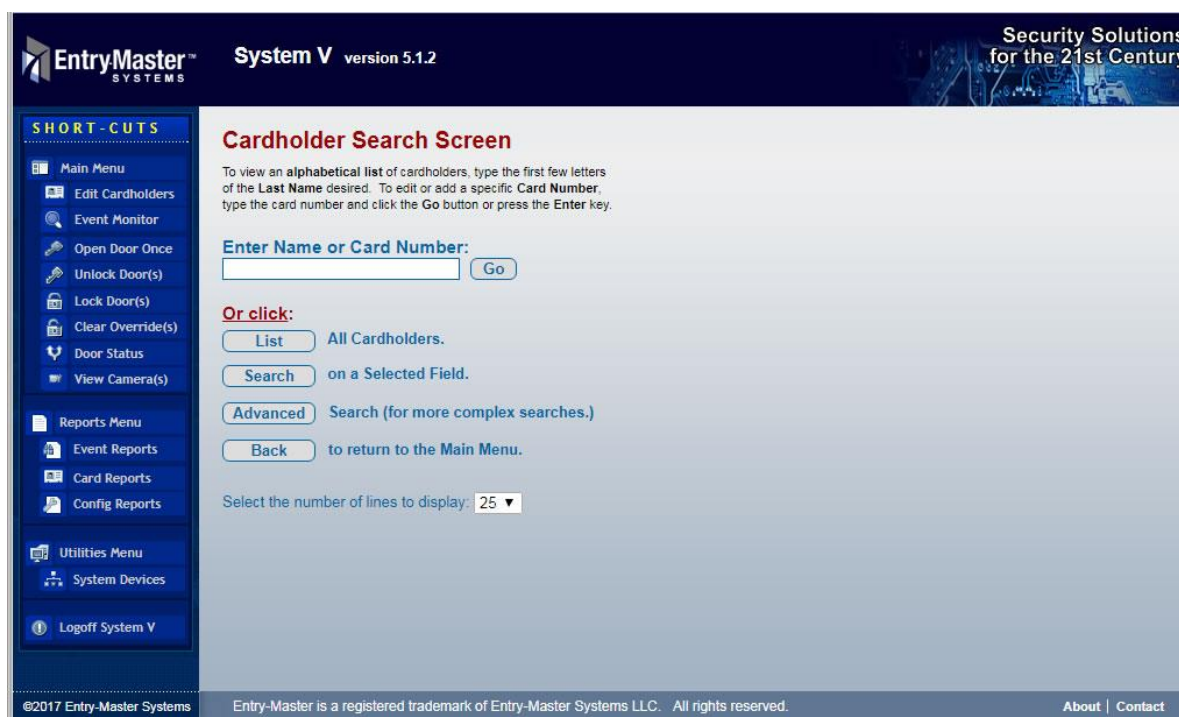


Figure 2-7-1. Cardholder Search Screen

The quickest and easiest way to search the cardholder database is to click on the “List” feature which will display the entire database.

Figure 2-7-2. Cardholder Search - List

If you know the cardholder Name, you can search by **Name** or by **Card Number**.

The selection of “**List**” will display a screen with the entire database (Figure 2-7-3 below):

SCH_CD50		Entry-Master® v5.1.2 Cardholder Search Screen			
Search: <b>Card Name Index</b> for Search String: * <b>(All Records)</b>					
Card Num.	Cardholder Name	Work Phone	In/Out	Department	
<a href="#">00000763</a>	BARKER, CINDY		Forgive	UMBC - MARKETING	
<a href="#">00101020</a>	DURANT, MARK		Forgive	UMBC	
<a href="#">00102001</a>	HAYNES, BILL		Forgive	UMBC	
<a href="#">07700007</a>	JONES, SAMMY		Forgive	AIR SYSTEMS INC	
<a href="#">00100091</a>	JONES, WILLIAM		Forgive	VARIA SYSTEMS LLC	
<a href="#">00007778</a>	JONESBY, LARRY		Forgive	APPLIED SCIENCE INC.	
<a href="#">00000153</a>	SMITH, ADAM		Forgive	VARIA	
<a href="#">00000762</a>	SMITH, NATALIE		Special	UMBC	
<a href="#">00002365</a>	SMITHEY, JONES		Forgive		
<a href="#">20000252</a>	VARIA TECH		Forgive	VARIA	
<a href="#">20000285</a>	VARIA TECH		Forgive	VARIA	
Enter Display Lines: 25 ▼ or Click: <input type="button" value="PageUp"/> or <input type="button" value="PageDn"/>					
				<input type="button" value="Back"/>	<input type="button" value="Print"/>
				<input type="button" value="Help"/>	

Figure 2-7-3. Cardholder List

For a larger systems, it is usually quicker to search by **Name**. For example, using just a search for the last name of “Jones” will display ALL cardholders with “JONES” in their **Last Name**. The “**Name**” search field only searches in the format of **Last Name, First Name**.

Type the name of an existing cardholder in the **Enter Name or Card Number** field. For this example, we will type “Dur” and either press the “Enter” key or press the “Go” button. The following screen will display:

SCH_CD50		Entry-Master® v5.1.2 Cardholder Search Screen		09/24/2017	
Search: <b>Card Name Index</b> for Search String: <b>DUR</b>					
Card Num.	Cardholder Name	Last Used	In/Out	Department	
<b>00101020</b>	<b>DURANT, MARK</b>	03/09/2017	Forgive	UMBC	
Enter Display Lines: 25 ▼		or Click: <input type="button" value="PageUp"/> or <input type="button" value="PageDn"/>		<input type="button" value="Back"/>	<input type="button" value="Print"/>
<input type="button" value="Help"/>					

Figure 2-7-4. Cardholder Search Results

To access the cardholder, click on the hyperlinked **Card Number** (see Figure 2-7-5 below):

SCH_CD50		Entry-Master® v5.1.2 Cardholder Search Screen		09/24/2017	
Search: <b>Card Name Index</b> for Search String: <b>DUR</b>					
Card Num.	Cardholder Name	Last Used	In/Out	Department	
<b>00101020</b>	<b>DURANT, MARK</b>	03/09/2017	Forgive	UMBC	
Enter Display Lines: 25 ▼		or Click: <input type="button" value="PageUp"/> or <input type="button" value="PageDn"/>		<input type="button" value="Back"/>	<input type="button" value="Print"/>
<input type="button" value="Help"/>					

Figure 2-7-5. Cardholder Search – Hyperlinked Number

Click on the **Card Number** hyperlink (as in Figure 2-7-5 above) and the **Cardholder Record** will display (see Figure 2-7-6 below):


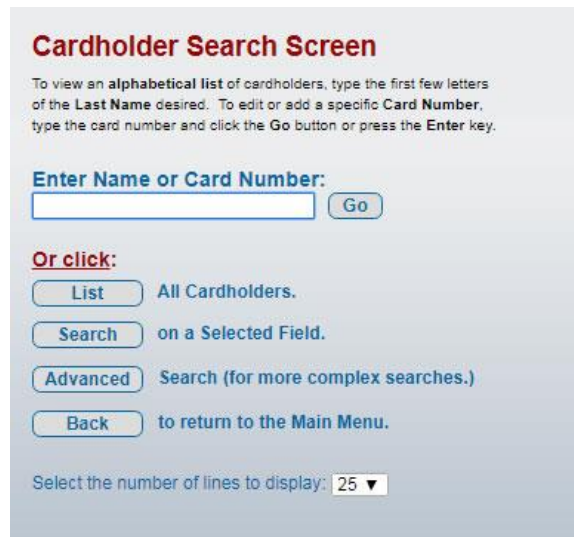
CARDS		Entry-Master® v5.1.2 Cardholder Database Screen		09/24/2017	
*>	Card Number: <b>00101020</b>	©2001-2017 by Entry-Master Systems. All Rights Reserved.			
1>	User's Name: <input type="text" value="DURANT, MARK"/>				
2>	Department: <input type="text" value="UMBC"/>				
3>	User ID #: <input type="text"/>				
4>	Photo File ID: <input type="text" value="00125528"/>				
5>	Type of Card: <input type="text" value="37 - EMS 37-bit format"/>				
6>	Issue Date: <input type="text" value="01/30/2017"/> <input type="button" value="Calendar"/>				
7>	Expiration: <input type="text"/> <input type="button" value="Calendar"/>				
8>	Revalidate: <input type="text"/> <input type="button" value="Calendar"/>				
9>	I/O Status: <input type="text" value="F - Forgive"/>	at 0311 03/09/2017 10:04:34			
10>	Home Phone: <input type="text"/>	16> Keypad PIN: <input type="text"/>			
11>	Work Phone: <input type="text"/>	17> <input type="checkbox"/> Trace <input type="checkbox"/> ADA Card			
12>	Acc Group 1: <input type="text" value="0001 - Base Employee Access"/>	<b>Nesting Level Information</b> Card Level: 0      Violations: 0 <b>*** Last Badging ***</b> Date: 03/09      Rdr#: 0311 Time: 10:04      Stat: 06			
13>	Acc Group 2: <input type="text" value="0002 - Executive Access"/>				
14>	Acc Group 3: <input type="text" value="---- No Group Selected ----"/>				
15>	Elev Access: <input type="text" value="0005 - Accounting 4th Floor"/>				
F1>	User's Notes: <input type="text" value="[Notes]"/>	Reader Loc Description: <input type="text" value="Front Main Entrance"/>			
<b>Last Badging Message ---&gt;</b>		<b>Access Granted by Valid Card.</b>			
<input type="button" value="Save"/>		<input type="button" value="Cancel"/>	<input type="button" value="Delete"/>	<input type="button" value="Prev"/>	<input type="button" value="History"/>
		<input type="button" value="Copy"/>	<input type="button" value="Next"/>	<input type="button" value="Back"/>	<input type="button" value="Print"/>
		<input type="button" value="Help"/>			

Figure 2-7-6. Cardholder Record Screen

Click the “**Back**” button to return to the **Cardholder Search Results** screen. Click the “**Back**” button again to return to the **Cardholder Search** screen.



**Cardholder Search Screen**

To view an **alphabetical list** of cardholders, type the first few letters of the **Last Name** desired. To edit or add a specific **Card Number**, type the card number and click the **Go** button or press the **Enter** key.

**Enter Name or Card Number:**

**Go**

**Or click:**

**List** All Cardholders.

**Search** on a Selected Field.

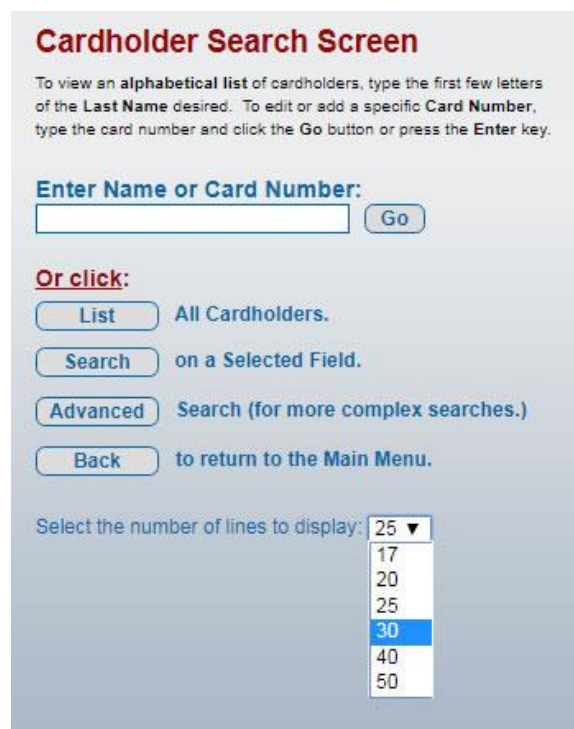
**Advanced** Search (for more complex searches.)

**Back** to return to the Main Menu.

Select the number of lines to display: 25 ▼

**Figure 2-7-7. Cardholder Search Screen**

Notice the options on this screen. Click “**List**” to access a screen with **All Cardholders**. You can also select the **number of lines** to display with your selection.



**Cardholder Search Screen**

To view an **alphabetical list** of cardholders, type the first few letters of the **Last Name** desired. To edit or add a specific **Card Number**, type the card number and click the **Go** button or press the **Enter** key.

**Enter Name or Card Number:**

**Go**

**Or click:**

**List** All Cardholders.

**Search** on a Selected Field.

**Advanced** Search (for more complex searches.)

**Back** to return to the Main Menu.

Select the number of lines to display: 25 ▼

- 17
- 20
- 25
- 30**
- 40
- 50

**Figure 2-7-8. Cardholder Search - Line Display**

Click on the line **Display** pulldown and select “**25**,” then press the “**List**” button to display the entire cardholder list (see **Figure 2-7-3** above).

You can see the **PageUp** and **PageDn** buttons to navigate through the list of cardholder records. The **PageDn** button moves down to the next group of **25 records**. The **PageUp** button moves up to the previous group of **25 records**. You can also change the number of lines displayed.

ID	Name	Action	Organization
00101033	CSP ENGINEER	Forgive	CSP CONSTRUCTION
00101023	CUSTEN, CALVIN	Forgive	UMBC
00101056	DAVIS, LISA	Forgive	CSP CONSTRUCTION
00101074	DEL TUFO, TODD	Forgive	ENTERPRISE

Enter Display Lines: 25 ▼ or Click: PageUp or PageDn Back

**Figure 2-7-9. Cardholder Search Records - Navigation**

Click the “**Back**” button to return to the **Cardholder Search** screen (**Figure 2-7-7**). Now click the “**Search**” button to search “on a **Selected Field**” (see **Figure 2-7-10** below):

Choose search field, or click Back to exit back to Main Search Screen.

- ☒ 1. User's Name
- ☐ 2. Department
- ☐ 3. User's ID#
- ☐ 4. Photo File ID
- ☐ 5. Type of Card
- ☐ 6. Issue Date
- ☐ 7. Expiration
- ☐ 8. Revalidate
- ☐ 9. I/O Status
- ☐ 10. I/O Reader
- ☐ 11. Home Phone
- ☐ 12. Work Phone
- ☐ \*\* Access Group(s)
- ☐ 16. Elev Access
- ☐ 18. Keypad PIN
- ☐ 19. ADA/Trace
- ☐ 20. Last Date
- ☐ 21. Last Time
- ☐ 22. Last Rdr#
- ☐ 23. Last Stat
- ☐ 24. Nest Level
- ☐ 25. I/O Date
- ☐ 26. I/O Time
- ☐ 27. Violations

Enter Display Lines: 25 ▼ Back Print Help

Enter Search Value: JONES Search

**Figure 2-7-10. Cardholder System Search**

Typically, you click on the field you desired; but the **User's Name** radio button is already selected. Type “Jones” in the **Search Value** field, then press the “**Search**” button on the bottom right of the screen. A screen will display ALL records with “JONES” in the **Last Name**.

Once again, return to the **Cardholder Search Screen** (either using the “**Back**” button or click on “**Edit Cardholders**” shortcut in the left-hand navigation).



To conduct an **Advanced Search**, press the “**Advanced**” button (Figure 2-7-11 below):

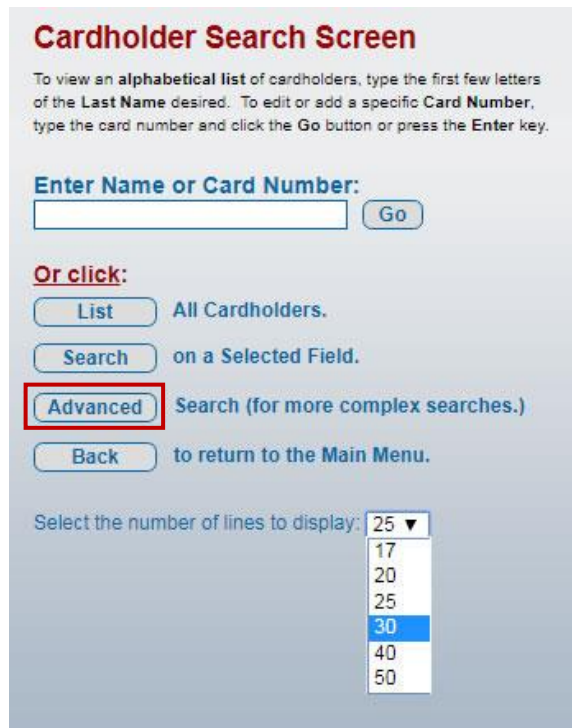


Figure 2-7-11. Cardholder Search - Line Display

The following screen will display (Figure 2-7-12):




Figure 2-7-12. Advanced System Search

The **Advanced Search** Criteria for more complex searches feature is an easy-to-use, point and-click, advanced search feature that allows you to construct customized queries. With menu-driven selections, you can retrieve stored data in a more “granular” fashion (i.e. with more detail) from the **Entry-Master** system installed at your facility.

## Advanced Search Entry Fields:

The table below describes the different fields that display on the Advanced Search Screen.

Field Name	Description
<b>Select a Field</b>	A drop-down list of data fields from the Cardholder database. The is selected first. For example, "Department" is a field in the Cardholder database.
<b>Rel Operator</b>	A drop-down list of relational operators that determine the condition needs to be met for data to appear on report. Using "Department is to..." as an example, the condition (or operator) is "Equal to." This all cardholder data that have a specific string of characters stored in department field.
<b>Search Data</b>	An entry field in which you type the string of text or numbers that stored (or not stored) in the data field. If we wanted all cardholder that have the word "Security" stored in the Department field, we would Security in this entry field.
<b>And/Or</b>	Links statements together to either include or exclude criteria. Here examples:  Department is equal to Security <b>OR</b> Department is equal to Safety Department is equal to Security <b>AND</b> Last Badging Date is greater than or equal to 01/01/2003

## Linking Query Statements:

You only need a single statement to create a query. However, the [Advanced Search](#) feature allows you to connect up to six conditional statements in a single query. Clicking on the **AND-OR** radio button links more than one statement together for a more sophisticated query.

Clicking on the AND radio button between statements means that the cardholder's record must qualify for both the first condition and the second condition. The query string below is searching for all records that include "Marketing" in the **Department** AND and **Issue Date** on or AFTER January 1, 2015.

**Note:** to search on Date field, you must use a month/day/year format.

SCH\_CD50 Entry-Master® v5.1.2 Advanced Cardholder Search

**Search Field**  
Department ▼  
☒ AND ☐ OR  
Issue Date ▼  
☒ AND ☐ OR  
-- Select a Field -- ▼

**Relational Operator**  
Containing ▼  
Greater Than or Equal to ▼  
-- Select Rel Operator -- ▼

**Search Data**  
MARKETING  
01/01/2015  
▼

☒ AND ☐ OR

**SUB-QUERY CONNECTOR**

**Search Field**  
-- Select a Field -- ▼  
☒ AND ☐ OR  
-- Select a Field -- ▼  
☒ AND ☐ OR  
-- Select a Field -- ▼

**Relational Operator**  
-- Select Rel Operator -- ▼  
-- Select Rel Operator -- ▼  
-- Select Rel Operator -- ▼

**Search Data**  
▼  
▼  
▼

Enter Display Lines: 25 ▼ **Search** Reset Back Print Help

Figure 2-7-13. Advanced Search Example

### Sub-Query Connector:

You can also create a "compound" query using the **Sub-Query Connector** radio button below the top three search query fields. The Sub-Query Connector connects the top three statements to the bottom three statements using **AND** or **OR** conditions. This feature tells the program to retrieve records based on the first three statements then retrieve records based on the second three statements.