

Lesson 8 – Adding and Deleting Cardholder Records

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.

- [Adding](#) a new Cardholder Record
- [Copying](#) a Cardholder Record
- [Deleting](#) a Cardholder Record

See [Appendix A](#), the *Cardholder Record Screen*, for a complete description of all fields and functions displayed on the Cardholder Record screen.

Adding a New Cardholder Record

From the *Main Menu* click on **Option 1 – Cardholder Search/Edit**:



The **Cardholder Search** is now displayed (Figure 2-8-1 below):

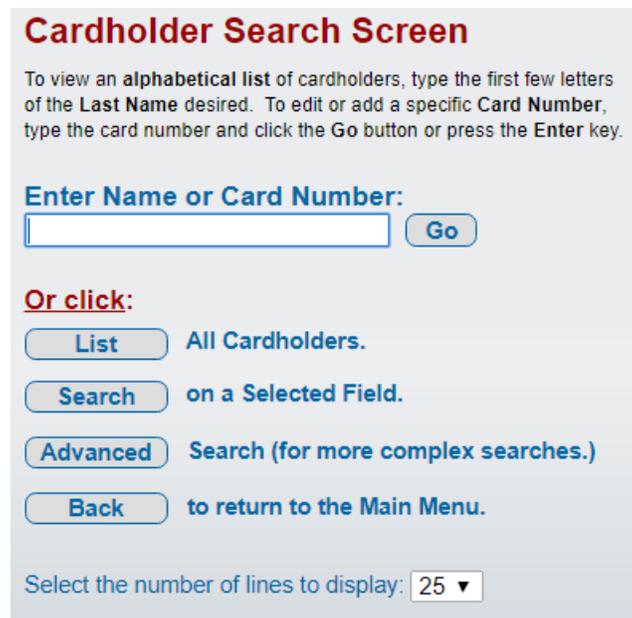


Figure 2-8-1. Cardholder Search Screen

There are two methods to enter a new Cardholder:

1. Type in the new card number in the top field and click the “Go” button.
2. Swipe a new card on a reader and find the new card on the **Event Monitoring** screen.

Method 1 for entering a new Cardholder

Type in the new card number in the top field and click the “Go” button:



Figure 2-8-2. Cardholder Search Screen – Enter New Card Number

A blank new cardholder screen will display (Figure 2-8-3 below):

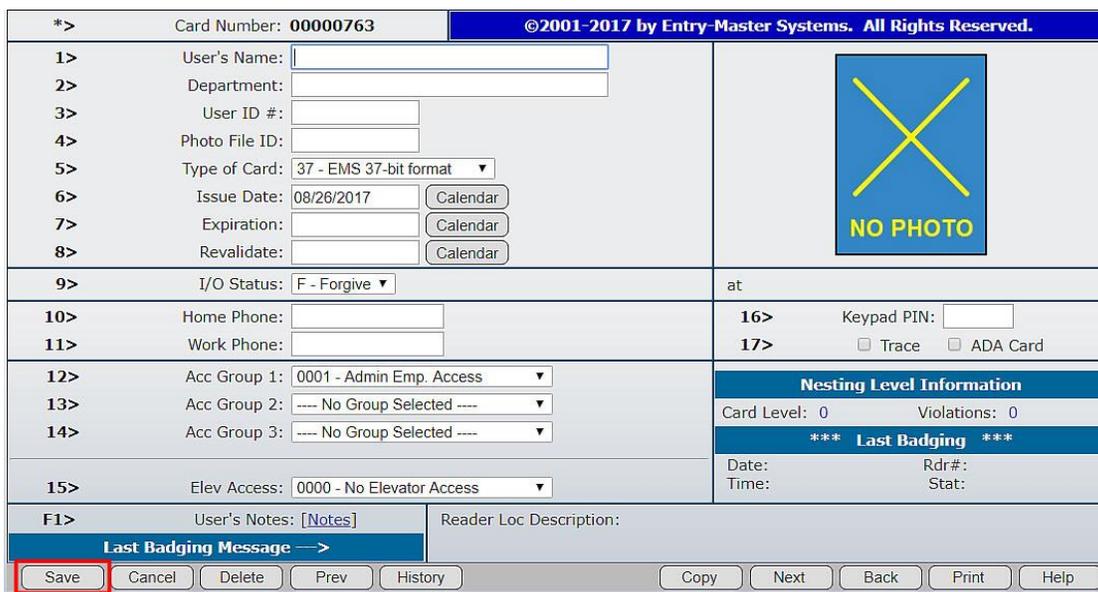


Figure 2-8-3. New Cardholder Screen

Enter the new cardholder data in the appropriate fields. Use the “**Save**” button at the bottom of the screen whenever needed. Each time the new cardholder data is saved, you will be returned to the top of the Cardholder screen.

The cursor is blinking in the **1 > User’s Name** field. This lesson section will take you through entering data on this screen.

Whenever a new card is added some fields are automatically set to their default values:

5 > Type of Card

12 > Acc Group 1

6 > Issue Date

15 > Elev Access

9 > I/O Status

Default values for any field on the card screen can be configured by your Dealer.

For this example, we will only enter data in five fields. The remainder of the fields will contain their default settings.

The **1 > User’s Name** field is the only required field for setting up a new cardholder. If you fail to enter a User Name you will be presented with the following Dialog Box:

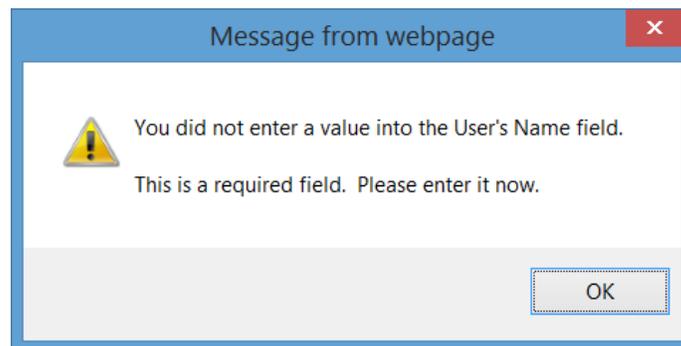


Figure 2-8-3a. No User Name Dialog Box

For this example, type “BARKER, CINDY” into the **1 > User’s Name** field. Always enter the LAST name first and the FIRST name last, using a comma and a space to separate the LAST and FIRST names. Use of upper or lower case is not required; on the Cardholder screen the Entry-Master System converts all text to upper case after you leave the field.

Click on the **2 > Department** field and enter “UMBC – Marketing.”

Click on the **6 > Issue Date** field. Notice that the Entry-Master System automatically inserts the current date into this field. The Issue Date field is the date when the card will begin working.

To enter a date you can type the date or use the **Calendar** button. In this example, we will enter the date Dec 1, 2016 as “120116.”

Click on the 7 > **Expiration** field. **Note:** The slashes in the date entry are not required. If you do not specify a year, the Entry-Master System uses the current year.

In this example, we want the card to be valid for six months. Click on the “Calendar” button next to the 7 > **Expiration** field and select “May 1, 2017” from the calendar pop-up window:



Figure 2-8-4. Calendar Button

Click the 12 > **Acc Group 1** field, use the drop-down list to select Access Group 0003 – **Limited Admin Staff** (Figure 2-8-5 below):

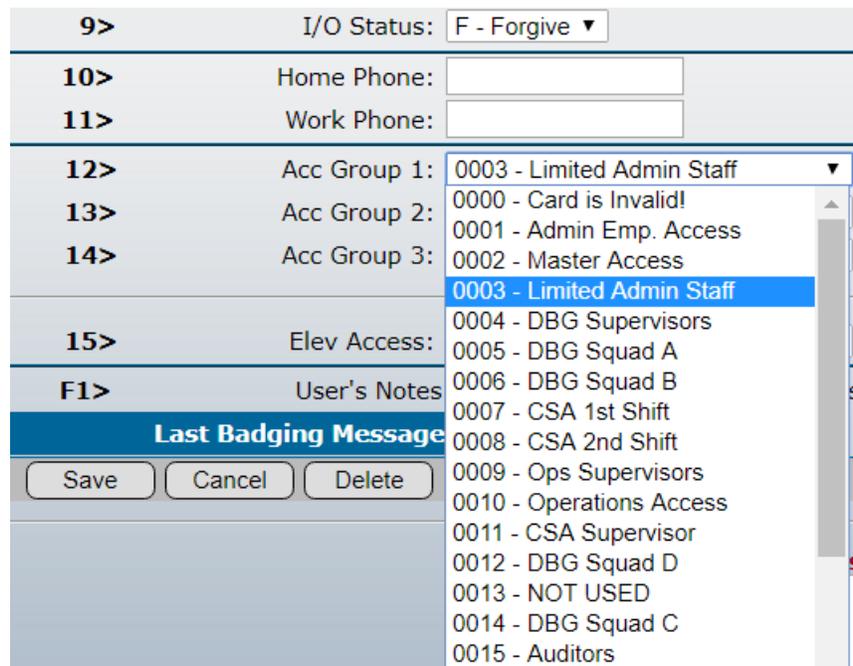


Figure 2-8-5. Selecting Cardholder’s Access Group #1

Figure 2-8-6 below shows the screen that reflects all the entries made for this cardholder:

CARDS		Entry-Master® v5.1.2 Cardholder Database Screen		08/26/2017	
* >		Card Number: 00000763	©2001-2017 by Entry-Master Systems. All Rights Reserved.		
1 >	User's Name:	BARKER, CINDY			
2 >	Department:	UMBC - MARKETING			
3 >	User ID #:				
4 >	Photo File ID:				
5 >	Type of Card:	37 - EMS 37-bit format			
6 >	Issue Date:	12/01/2016 <input type="button" value="Calendar"/>			
7 >	Expiration:	05/01/2017 <input type="button" value="Calendar"/>			
8 >	Revalidate:	<input type="button" value="Calendar"/>			
9 >	I/O Status:	F - Forgive	at		
10 >	Home Phone:		16 >	Keypad PIN:	
11 >	Work Phone:		17 >	<input type="checkbox"/> Trace <input type="checkbox"/> ADA Card	
12 >	Acc Group 1:	0003 - Limited Admin Staff	Nesting Level Information Card Level: 0 Violations: 0		
13 >	Acc Group 2:	---- No Group Selected ----	*** Last Badging *** Date: Rdr#:		
14 >	Acc Group 3:	---- No Group Selected ----	Time: Stat:		
15 >	Elev Access:	0000 - No Elevator Access	F1 > User's Notes: [Notes] Reader Loc Description:		
Last Badging Message --->					
<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 2-8-6. Completed Cardholder Screen

Method 2 for entering a new Cardholder – Swipe the New Card

Another way to enter a new card is to swipe the card with a reader. Sometimes an HID or other access card has numbers that are difficult to read, but this method also avoids the risk of typing the card number incorrectly.

Swipe the new card on a card reader (preferably one close to you).

Go to the **Event Monitoring** screen. You can navigate to the Event Monitoring screen either using **Option 4** on the **Main Menu** or using the link on the lefthand navigation Shortcuts “Event Monitor” (Figure 2-8-7 below):

Figure 2-8-7. Navigating to the Event Monitoring Screen

The next Figure below shows the **Event Monitoring** screen after a new card has been swiped. The new card will appear near the bottom of the screen with a message that reads “Card Not Defined” with the card number hyperlinked. The **Cardholder’s Name** field will appear as “**Unknown**.”

Click on the hyperlinked card number to add the card to the system (Figure 2-8-8 below):

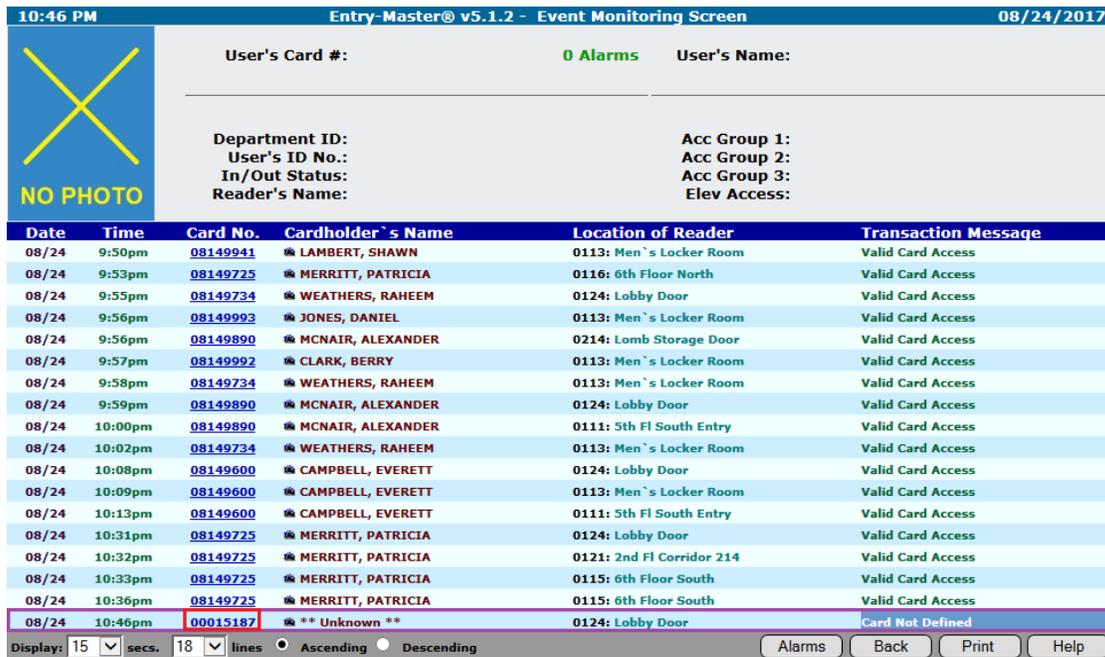


Figure 2-8-8. Clicking on the Hyperlink to Add a Card Number

After clicking on the hyperlinked card number, the new card screen will display (Figure 2-8-9 below). Now the “new” cardholder fields can be filled in with the desired information.

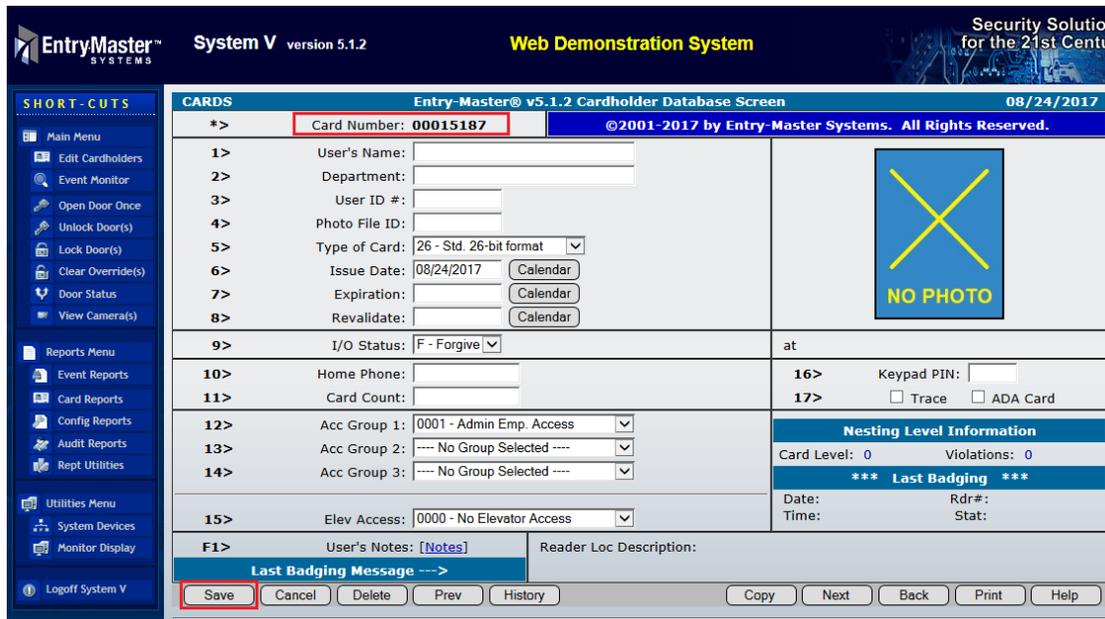


Figure 2-8-9. New Cardholder Record Screen

Copying a Cardholder Record

In the event that a card is lost or damaged, an easy way to create a new record is to copy the existing Cardholder Record, then enter the new card number.

Select an existing cardholder record (See [Chapter 2 - Lesson 7](#) for more information on **Searching a Cardholder’s Record**).

Click the **Copy** button near the bottom of the screen (**Figure 2-8-10**):

CARDS		Entry-Master® v5.1.2 Cardholder Database Screen		08/29/2017	
*> Card Number: 00101020		©2001-2017 by Entry-Master Systems. All Rights Reserved.			
1>	User's Name: DURANT, MARK				
2>	Department: UMBC				
3>	User ID #:				
4>	Photo File ID:				
5>	Type of Card: 37 - EMS 37-bit format				
6>	Issue Date: 01/30/2017				
7>	Expiration: 08/25/2017				
8>	Revalidate:				
9>	I/O Status: F - Forgive	at 0112 03/02/2017 15:06:13			
10>	Home Phone:	16>	Keypad PIN:		
11>	Work Phone:	17>	<input type="checkbox"/> Trace <input type="checkbox"/> ADA Card		
12>	Acc Group 1: 0001 - Admin Emp. Access	Nesting Level Information Card Level: 0 Violations: 0			
13>	Acc Group 2: 0015 - Auditors	*** Last Badging *** Date: 03/02 Rdr#: 0112 Time: 15:06 Stat: 06			
14>	Acc Group 3: ---- No Group Selected ----				
15>	Elev Access: 0004 - Limited Elev Access				
F1>	User's Notes: [Notes]	Reader Loc Description: 5th Fl North Entry			
Last Badging Message --->		Access Granted by Valid Card.			
Save		Cancel		Delete	
Prev		History		Copy	
		Next		Back	
		Print		Help	

Figure 2-8-10. Existing Cardholder Record Screen

When you click the **Copy** button the “new” record will be displayed on the screen. The “old” number appears at the top of the “new” record with the **Enter New Card Number** field near the bottom of the screen (**Figure 2-8-11**):

CARDS		Entry-Master® v5.1.2 Cardholder Database Screen		08/29/2017	
*> Card Number: 00101020		©2001-2016 Entry-Master Systems. All Rights Reserved.			
1>	User's Name: DURANT, MARK	6>	Issue Date: 01/30/2017		
2>	Department: UMBC	7>	Expiration: 08/25/2017		
3>	User ID#:	8>	Revalidate:		
4>	Lic. Plate:	9>	I/O Status: Forgive		
5>	Reg. State: 37 - EMS 37-bit format	at 0112 03/02/2017 15:06:13			
10>	Home Phone:	**>	Keypad PIN: N/A		
11>	Work Phone:	17>	Trace (Y/N)? No		
12>	Acc Group 1: 0001 - Admin Emp. Access	Nesting Level Information Card Level: 0 Violations: 0			
13>	Acc Group 2: 0015 - Auditors	*** Last Badging *** Date: 03/02 Rdr#: 0112 Time: 15:06 Stat: 06			
14>	Acc Group 3: -				
15>	Elev Access: 0004 - Limited Elev Access				
F1>	User's Notes: []	Reader Loc Description: 5th Fl North Entry			
Last Badging Message --->		Access Granted by Valid Card.			
Enter New Card Number: 5413		Copy		Back	
				Print	
				Help	

Figure 2-8-11. Entering New Card Number

Type in the “new” card number and press “Enter” or click the **Copy** button. A dialog box will appear (Figure 2-8-12). Click “OK.”

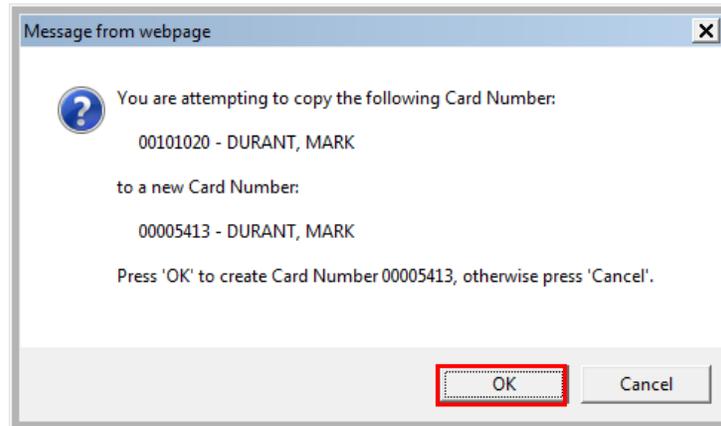


Figure 2-8-12. New Card Number Dialog Box

The new Cardholder Record, with the data from the original card number, will be displayed with the new Card Number you typed in (Figure 2-8-13):

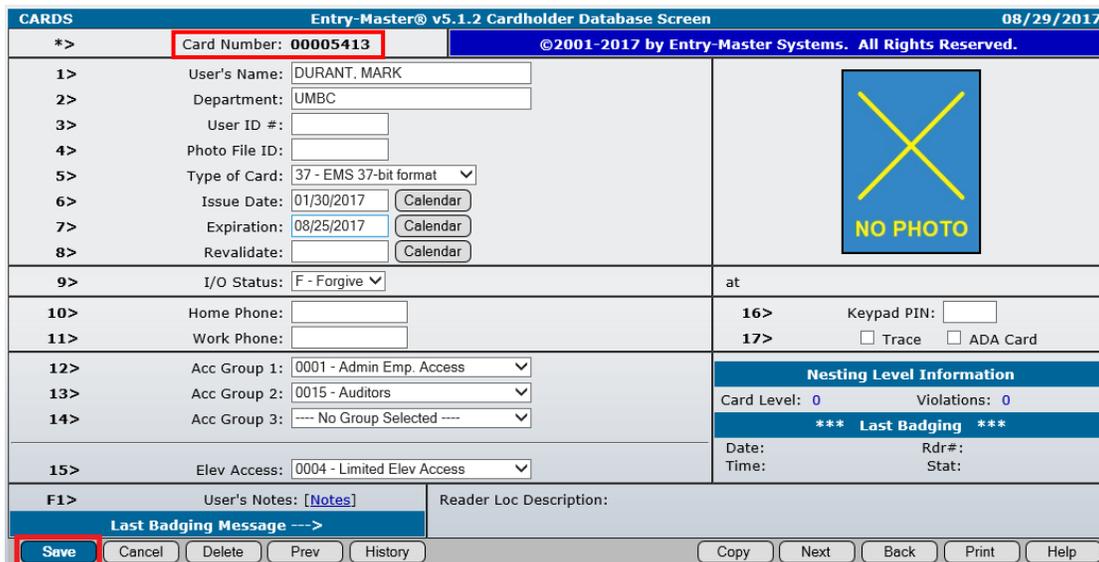


Figure 2-8-13. Clicking “Save” Button to Save Copied Card Number

Now, click the “Save” button, or press the <Enter> key to save the copied Cardholder Record.

The “Save” button must be clicked, or the <Enter> button pressed, in order to save the new, copied **Cardholder Record**. If you click away from this screen without clicking “Save” or pressing <Enter>, the copied Cardholder Record will not be saved.

Once the copied Cardholder Record is saved, you should edit the original Cardholder Record and invalidate it, either by expiring or invalidating it.

The system will not allow a copied Card Number to replace an existing Card Number. In order to copy one Cardholder Record to an existing Card Number, the existing Card Number must be **deleted first**. Failure to do so will cause the following screen to appear:

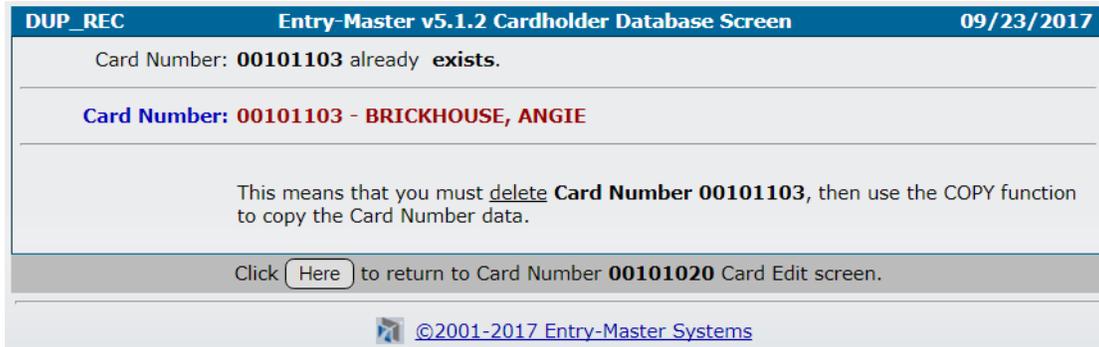


Figure 2-8-14. Existing Card Number Dialog Box

Deleting a Cardholder Record

There are very few reasons to delete a card. This section covers how to **Delete a Cardholder Record** in the event that you want/need to do so.

It is recommended that you avoid deleting a **Cardholder Record**. The card usage history is not deleted when a card number is deleted, but retrieval of data can be very difficult. Retrieval of card history may only be possible by recreating the deleted card number and it is likely that doing so will corrupt the card’s history data.

The system has the capacity to hold many thousands of Cardholder Records – space is not a concern. It is not uncommon for auditors to request full system history logs going back 18 to 36 months. Missing card numbers make audits highly problematic; therefore, it is recommended that Card Numbers not be deleted.

Select an existing cardholder record (See [Chapter 2 - Lesson 7](#) for more information on **Searching a Cardholder’s Record**).



Figure 2-8-15. Selecting Card Search/Edit Option

Click the **Delete** button near the bottom of the screen (Figure 2-8-16):

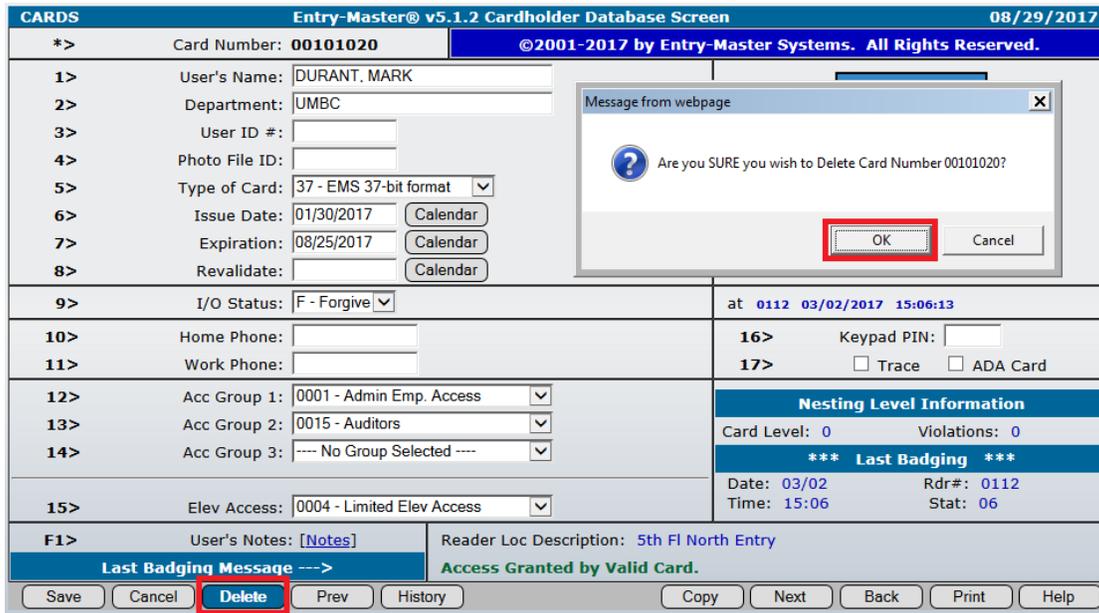


Figure 2-8-16. Deleting a Cardholder Record

When you click the Delete button you will be presented with the dialog box that appears above in Figure 2-8-16. When you click “OK” the system will display a blank Cardholder Record for the number you have deleted (the same screen you will get when you enter a New card number (Figure 2-8-17):

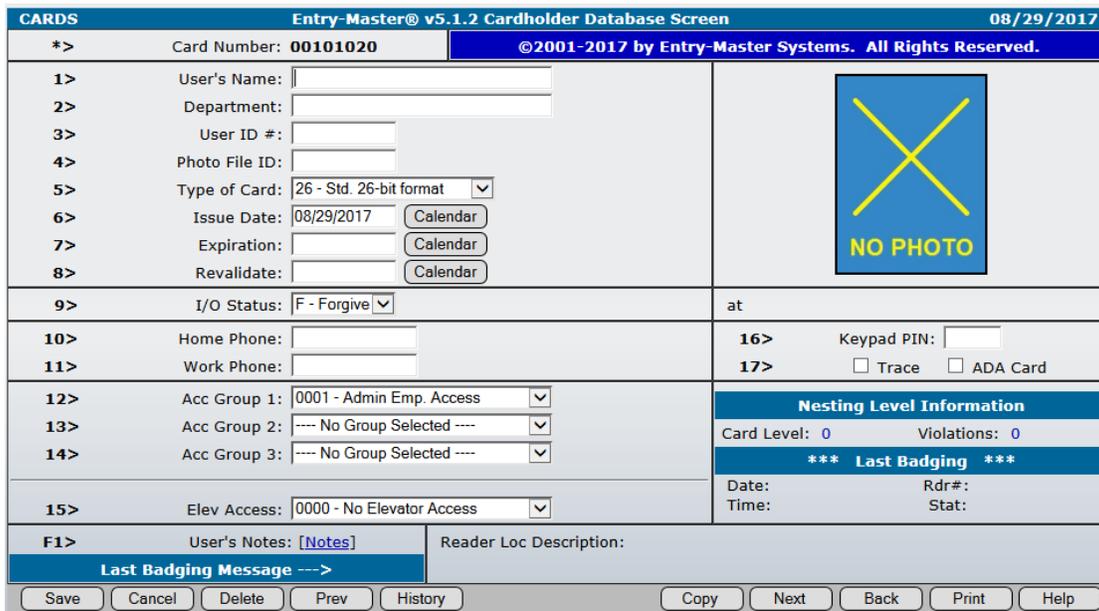


Figure 2-8-17. Blank Cardholder Record after Deletion

The display of the blank Cardholder Record is the indication that the Card Number has been successfully deleted.