Lesson 9 – Batch Updating Cards

The **Batch Update Cardholders** feature on the Entry-Master System gives you the ability to update large groups of Cardholders within your system. This lesson will give an overview of the following Batch Updates:

- Batch Add Cards by Card Number
- Batch Update by Card Number
- Batch Update by a Selected Field
- Batch Update Inactive Card Users

> **IMPORTANT NOTE:**
>
> Running any **Batch Update** function permanently changes your data. Entry-Master Systems recommends that you **backup 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 backup of your data. For information regarding Backing up and Restoring in Chapter 4 - Using Entry-Master Disk Utilities.

Accessing Batch Update Function

To use the **Batch Update** function, log into the Entry-Master System (See Chapter 2 - Lesson 1, **Logging into the System**).

At the **Main Menu** select **Option 3**, **Enter Utilities Menu**:

Figure 2-9-1. Main Menu – Enter Utilities Menu

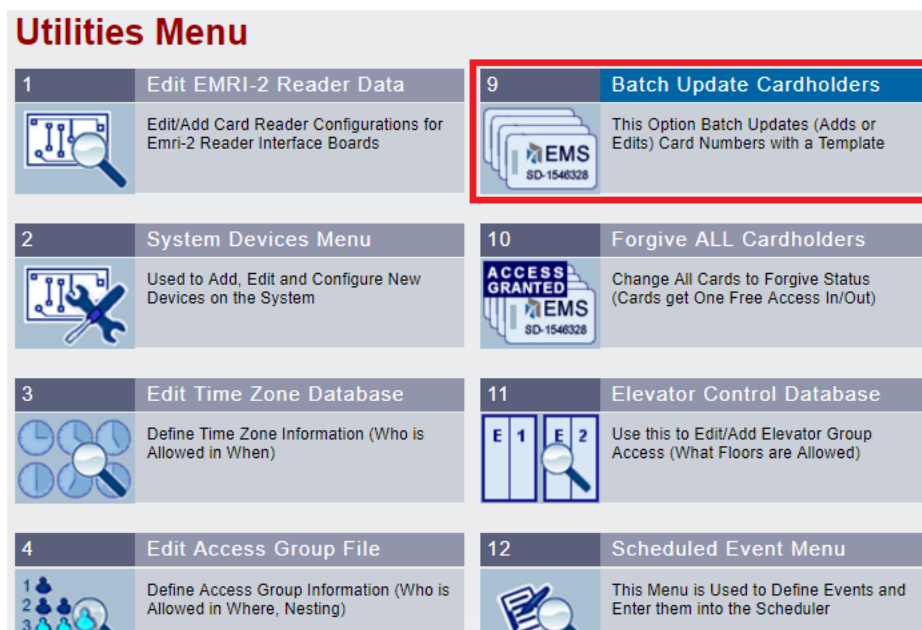On the **Utilities Menu** select **Option 9, Batch Update Cardholders**:

Figure 2-9-2. Utilities Menu – Option 9

All of the following sections will assume that you have logged in to the Entry-Master System and navigated to the *Batch Update Cardholder Menu* by clicking Option 9, as shown above (**Figure 2-9-2**).

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.

The *Batch Add Cards by Card Number* option assumes that your Entry-Master dealer (or other supplier of your cards) has provided cards that are in numerical order, and have no cards missing in the set of cards provided.
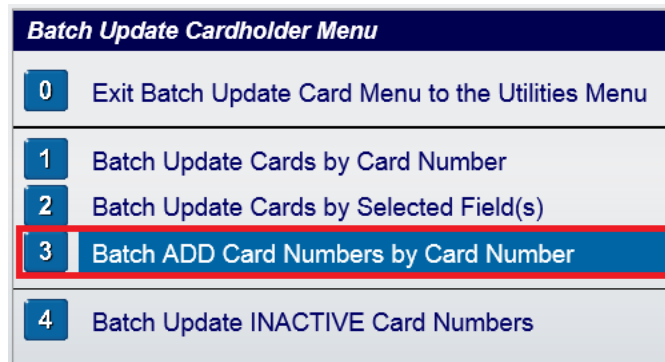
> **IMPORTANT NOTE:**
>
> If the cards supplied to you are not in numerical order, or have card numbers missing in the sequence of cards provided, then the *Batch Add Cards by Card Number* function should not be used. In the case of card numbers that are not in numerical sequence and continuous (i.e. no missing numbers) then adding card numbers by starting and ending card numbers may not be the best way to enter the card numbers into your Entry-Master system. In such a case, contact your Entry-Master dealer and inform them of the situation; they should be able to inform you on the best method for adding the card numbers.

For this example, we will only be adding three (3) cards into the system. Normally, this function would be used to add a significant number of cards; otherwise, it is much more efficient (and less dangerous) to add a few cards one at a time, using the COPY function to make the process easier and quicker (See the *Copying a Cardholder Record* section of Chapter 2 - Lesson 8).

You can follow along and actually add the cards to the system, if you wish. Three cards are relatively easy to delete, and this is a rare example of when deleting cards is appropriate.
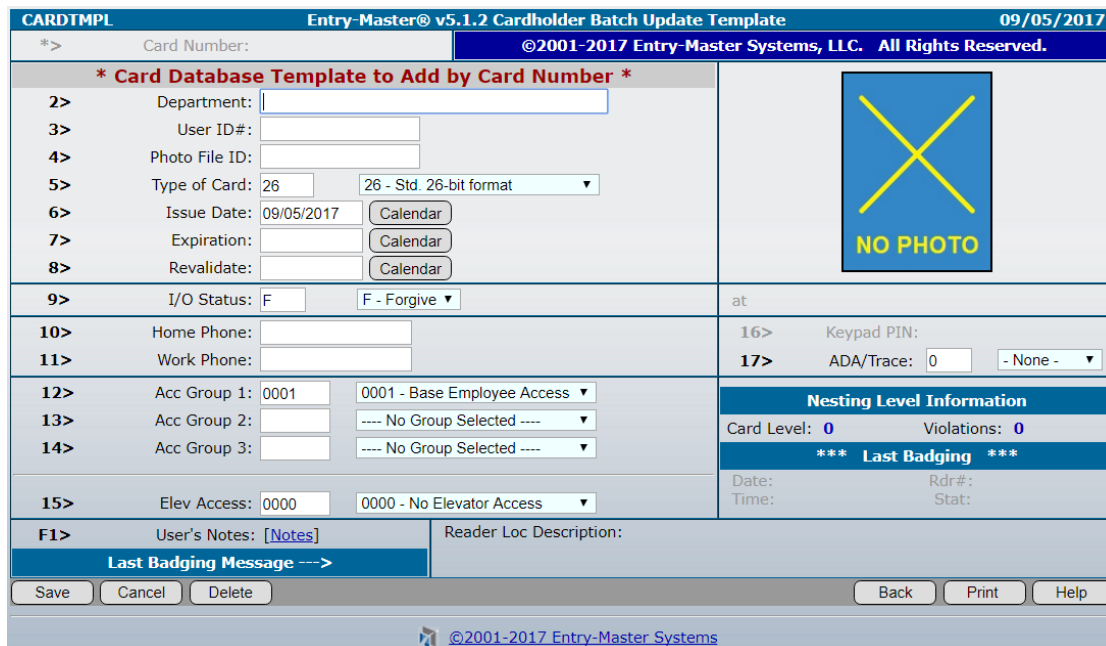
To begin, select **Option 3, Batch ADD Card Numbers by Card Number**, as shown below in **Figure 2-9-3**:

Figure 2-9-3. Batch Adding Card Numbers

The following *Batch Add by Card Number* template screen is displayed (**Figure 2-9-4**):

Figure 2-9-4. Initial Batch Add Card Template with Default Fields

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.** ●
>
> Also, notice that all of the same default fields you saw in <u>Chapter 2 – Lesson 8</u> (*Adding and Deleting Cardholder Records*) are filled in already. You may alter these fields, but these fields are necessary to the proper operation of a cardholder record, and if you make them blank or deselected them, the cardholder records you create with the **Batch Add** function may not operate correctly.
>
> If cardholder records are batch added improperly, they cannot be added again (since **Batch Add never overwrites existing records**); the only way to correct them is to batch update them by **Card Number** or S**elected Record**, which sections follow this one.

1. Type "Technical Support" in the **2> Department** field. Note that once you move to another field, or click "Save" the field "folds" any lower case letters to upper case.

2. In this example, the **5> Type of Card** field defaults to **26 – Std. 26-bit format**. The appropriate card type will be supplied by your Entry-Master dealer. If your system uses multiple card types, your dealer will instruct you as to how to determine what selection to make. For this example, make sure the **5> Type of Card** field is selected as **26 – Std. 26-bit format**.

3. The **6> Issue Date** field will already have the current date selected. **Note that the issue date serves as an activation date, as well.** For this example, type "10/02/2017" to select **10/02/2017**, or use the "**Calendar**" button to select the date.

> **IMPORTANT NOTE:**
>
> Normally, entering dates in the Entry-Master system is very flexible – you can type in almost anything that could be reasonably understood as a legitimate date, and the system will interpret it and enter it into the field in the proper format (i.e. **MM/DD/YYYY**).
>
> However, in the case of batch updates, the dates must be entered *EXACTLY* in the **MM/DD/YYYY** format; otherwise, the updated cards may not function as desired.
>
> The reason for this inconvenience is that the batch update procedure includes some special characters that allow for more sophisticated search and replace functions that can be independently programmed for each field in a batch update. This added flexibility requires that the normal "date checking" features (which ensure that "legitimate" dates are being entered into date-formatted fields) are not able to function.
>
> **It is for this reason that we strongly urge you to use the "Calendar" buttons that are to the right of all date-formatted fields. Using the "Calendar" button guarantees that a valid date will be inserted into the batch update card template.**

4. The **7> Expiration Date** for these cards will be December 31, 2017. Type "12/31/2017" in this field. The date must be entered as **MM/DD/YYYY** for system to properly process it.

5. All new cards are typically set to **Forgive**, which should be the default value. If the **9> I/O Status** field is not set to forgive, <u>**stop this lesson**</u> **and contact your System Adminstrator or your Entry-Master dealer.**

6. These cardholders will be allowed *Base Employee Access* (**Access Group 0001**) to the facility. The **12> Acc Group 1** field may default to a different group number or **Access Group 0001** may not be *Base Employee Access*, depending upon how your particular system is configured. For this example, if the group is not already set to **Access Group 0001**, then please use the drop-down menu to select it.

7. The **15> Elevator Access** field should default to **0000 – No Elevator Access**. For this example, if the elevator group is not already set to **Elevator Access Group 0000**, then please use the drop-down menu to select it (just as you did with **12> Acc Group 1** in **Step 6** above).

8. Leave the **17> ADA/Trace** field with its default of **0 - None**. The template should look like the following figure (**Figure 2-9-5**):

Figure 2-9-5. Completed Batch Add Card Template

> **IMPORTANT NOTE:**
>
> When you "batch add" cards, you are required to enter at least the **12> Access Group 1** field to be defined on the **Card Template Screen**. If the **12> Access Group 1** field is left undefined, then the Entry-Master Software assumes that **12> Access Group 1** is set to **0000 –Invalid Card** and assigns all cards that are added as **Invalid**.

9. Click on the "Save" button to start the *Batch Add Card* process. The following screen displays and you will type in the **Starting** and **Ending Card Numbers** to **Add** (**Figure 2-9-6** below):
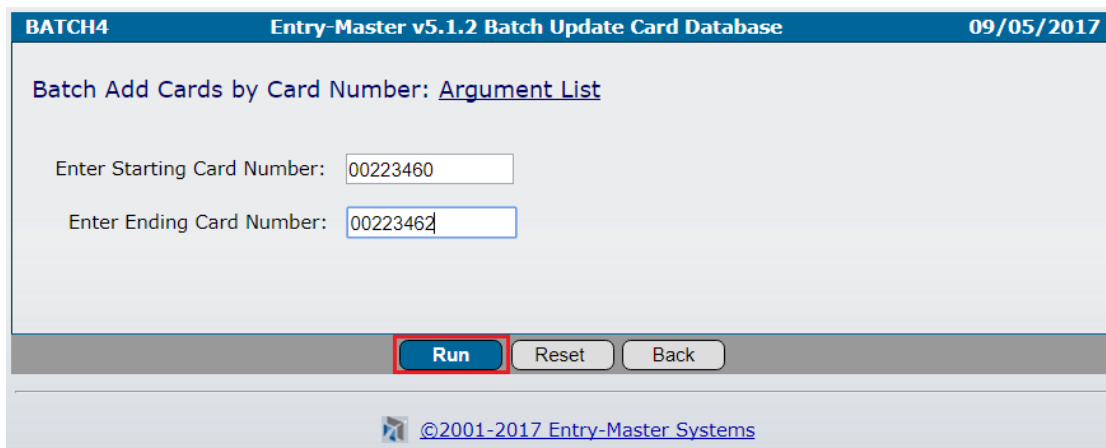
Figure 2-9-6. Selecting the Starting and Ending Card Numbers to Add

10. Click on the "Run" button and a "processing screen" is displayed, informing you to wait for the Batch Update to finish. When the batch update is finished, it will display the following screen (**Figure 2-9-7**):
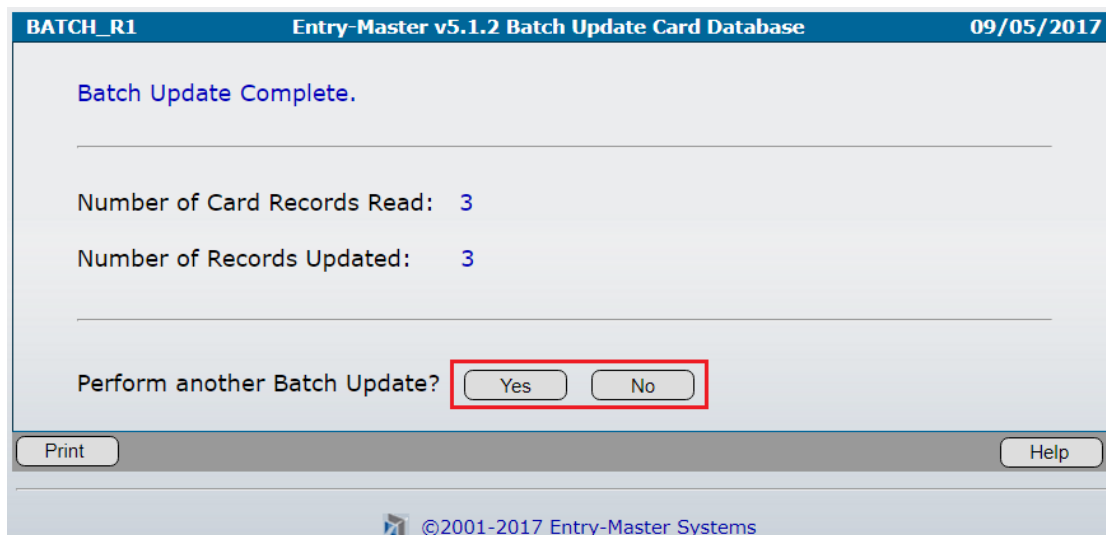

Figure 2-9-7. Batch Update Completed – Perform another Batch Update Query

This message confirms that the cards have been added to the database. At this point, you will need to inform the system whether you wish to perform another batch update, and click the appropiate button. If you choose "Yes" then the system returns you to the *Batch Update Cardholder Menu* (as in **Figure 2-9-3**); if "No" is selected, the system **deletes** the card template you were using and displays the following screen, before returning you to the *Utilities Menu*:
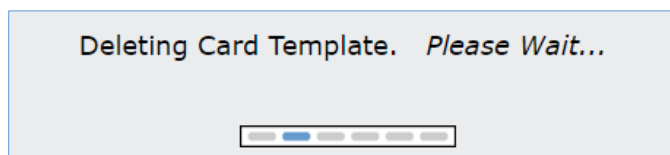

Figure 2-9-8. Deleting the Card Template

Batch Update by Card Number (*for existing cardholders*)

To batch update cardholders by Card Number, select **Option 1, Batch Update Cards by Card Number**, as shown below in **Figure 2-9-9**:

Figure 2-9-9. Batch Update by Card Number

The following *Batch Update by Card Number* template screen is displayed, and for this example, we are only going to change the **9> I/O Status** field to "Special" (see **Figure 2-9-10** below):

Figure 2-9-10. Initial Batch Update Card Template with I/O Status Selected

At this point, you can enter information in every field or in some of the fields. Only the fields that are filled in will be altered by the batch update. Fields left blank are not altered.

1. In this example, you will change the **9> I/O Status** fields for cards numbered from **223460** to **223462**. Click in the **9> I/O Status** field and select "**S - Special**" from the drop-down list, as shown above in **Figure 2-9-10**.

2. Click on the "Save" button to start the batch update process. The following screen displays; type in the **Starting** and **Ending Card Numbers** to **Update** (see **Figure 2-9-11** below):

Figure 2-9-11. Selecting the Starting and Ending Card Numbers to Update

3. Click on the "Run" button and the following screen is displayed (**Figure 2-9-12 below**), informing you to wait for the Batch Update to finish:

Figure 2-9-12. Waiting for the Batch Update to be Completed

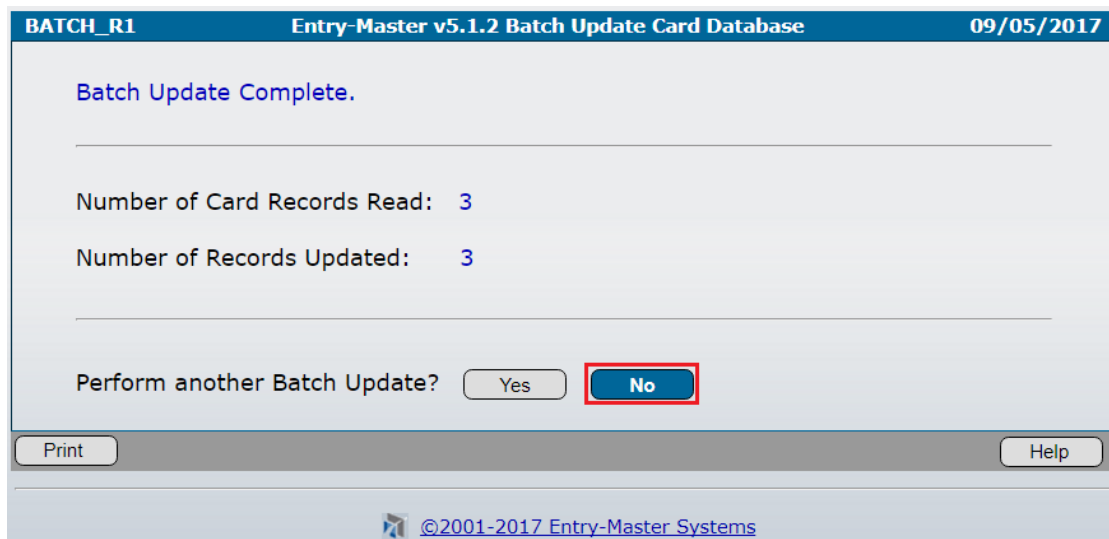4. When the batch update is finished, it will display the following screen (**Figure 2-9-13**):

Figure 2-9-13. Batch Update Completed – Perform another Batch Update Query

Batch Update by Selected Field (*for existing cardholders*)

Suppose you want to assign a "Vendor" access group for all cardholders who have the word "VENDOR" in their **2> Department** field. To batch update cardholders by a selected field, select **Option 2, Batch Update Cards by Selected Field(s)**, as shown below in **Figure 2-9-14**:

Figure 2-9-14. Batch Update by Selected Field

The following *Batch Update by Selected Field* template screen is displayed, and for this example, we are only going to change the **12> Acc Group 1** field to "**0015**" (see **Figure 2-9-15** below):

Figure 2-9-15. Initial Batch Update Card Template with Group "0015" Selected

At this point, you can enter information in every field or in some of the fields. Only the fields that are filled in will be altered by the batch update. Fields left blank are not altered.

1. In this example, you will change the **12> Acc Group 1** fields for cards that contain "**VENDOR**" in the **2> Department** field. Click in the **12> Acc Group 1** field and select group "**0015 – Vendor Access**" from the drop-down list, as shown above in **Figure 2-9-15**.

2. Click on the "Save" button to start the batch update process; the following screen displays:

3. Select "Department" for the **Search Field** and type "Vendor" in the Search String field (note that whatever you type in the **Search String** field get "folded" to upper-case, once you click any other field or button – See **Figure 2-9-16** below):

Figure 2-9-16. Selecting the Department Containing VENDOR to Update

4. Click on the "Run" button and a "processing screen" is displayed, informing you to wait for the Batch Update to finish. When the batch update is finished, it will display a screen, which informs you that the batch update has completed, and how many cardholder records were updated. See **Figure 2-9-7** to see an example of this screen, as well as how to proceed when you are finished.

Batch Update Inactive Cards (*for existing cardholders*)

There may come a time where you wish to update cards which have not been used for some specific time. Usually, the best way to accomplish this is by expiring cards that have not been used since a specified date. To batch update inactive cardholders, select **Option 4, Batch Update INACTIVE Card Numbers**, as shown below in **Figure 2-9-17**:

Figure 2-9-17. Batch Update Inactive Cards

The following *Batch Update Inactive Cards* template screen is displayed, and for this example, you are only going to change the **7> Expiration** field to "**12/24/2017**" (see **Figure 2-9-18** below):

Figure 2-9-18. Batch Update Card Template with Expiration set to 12/24/2017

At this point, you can enter information in every field or in some of the fields. Only the fields that are filled in will be altered by the batch update. Fields left blank are not altered.

1. In this example, you will change the expiration fields for cards that have not been used since **01/01/2017** to expire on **12/24/2017**. Click the "**Calendar**" button next to the **7> Expiration** field and select the "**12/24/2017**" button on the calendar window (See **Figure 2-9-18).**

2. Click on the "Save" button to start the batch update process; the following screen displays:

Figure 2-9-19. Selecting the Batch Inactive Cards Cut-Off Date to 01/01/2017

3. Click the "**Calendar**" button to the right of the **Cut-Off Date for Inactive Cards** field, as shown above in **Figure 2-9-19**, and select the "**01/01/2017**" button on the calendar window.

4. Click on the "Run" button and the following screen is displayed (**Figure 2-9-20 below**), informing you to wait for the Batch Update to finish:

Figure 2-9-20. Waiting for the Batch Update to be Completed

5. When the batch update is finished, it will display the following screen (**Figure 2-9-21**):
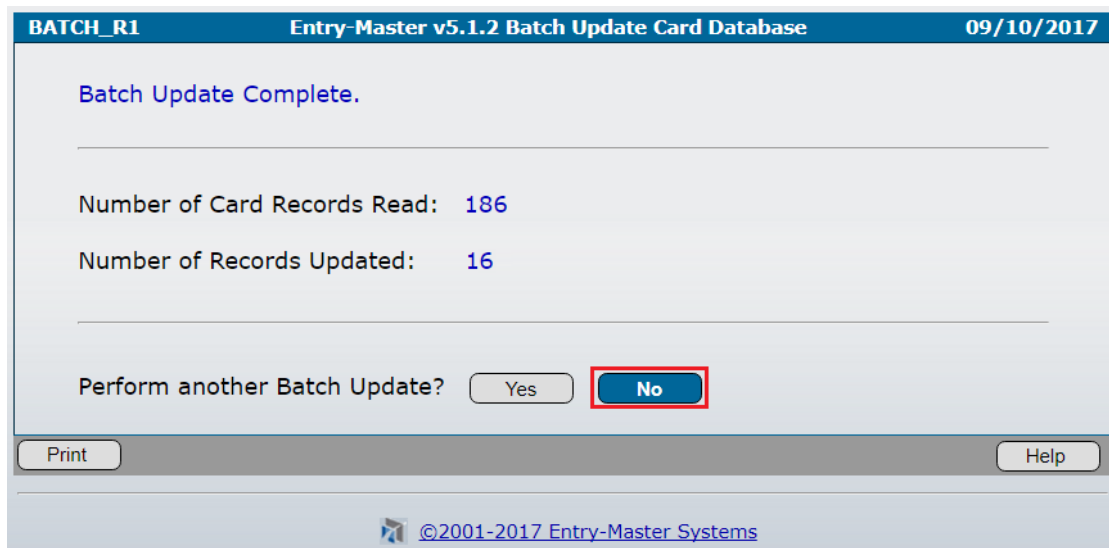

Figure 2-9-21. Batch Update Completed – Perform another Batch Update Query

6. At this point, you will need to inform the system whether you wish to perform another batch update, and click the appropiate button. If you choose "Yes" then the system returns you to the *Batch Update Cardholder Menu* (as in **Figure 2-9-17**); if "No" is selected, the system **deletes** the card template you were using and displays the following screen, before returning you to the *Utilities Menu*:
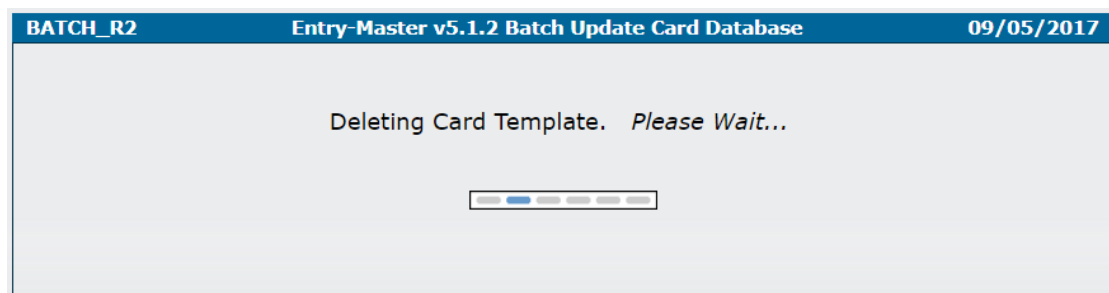

Figure 2-9-22. Deleting the Card Template