

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**:

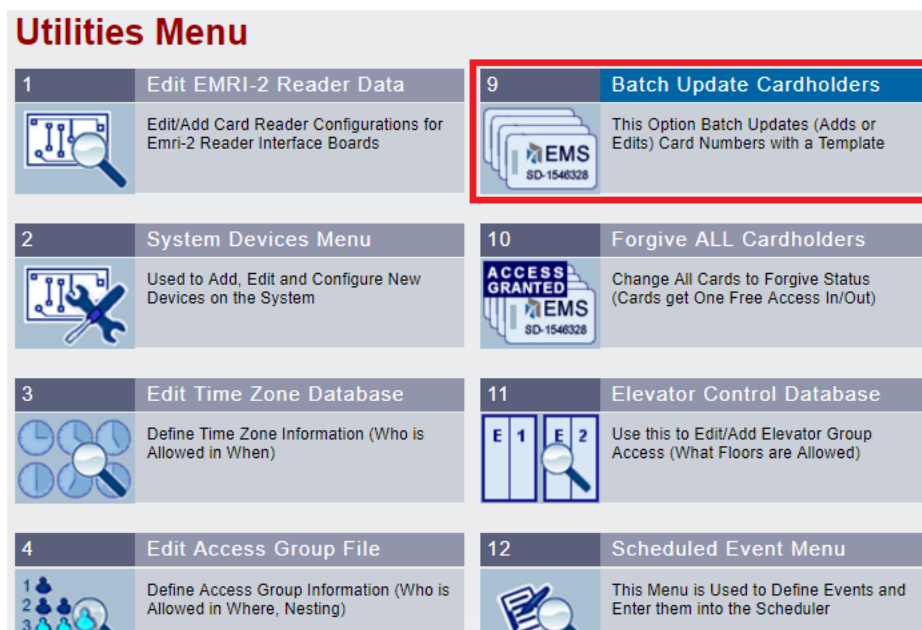


Figure 2-9-2. Utilities Menu – Option 9

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.

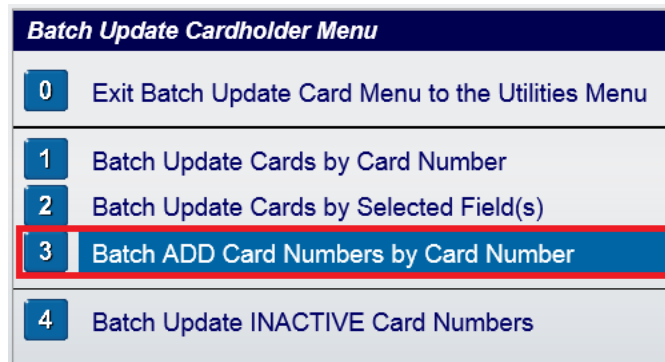
IMPORTANT NOTE:

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.

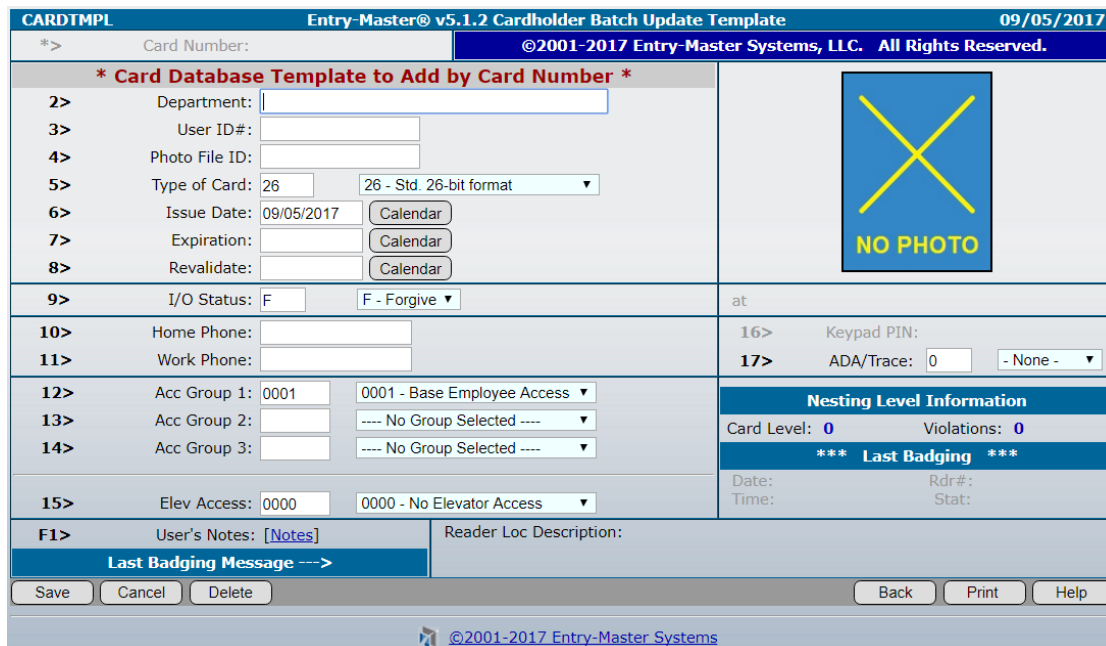
To begin, select **Option 3, Batch ADD Card Numbers by Card Number**, as shown below in **Figure 2-9-3**:



The screenshot shows a menu titled "Batch Update Cardholder Menu". It contains five numbered options. Option 3, "Batch ADD Card Numbers by Card Number", is highlighted with a red border. The other options are: 0 Exit Batch Update Card Menu to the Utilities Menu, 1 Batch Update Cards by Card Number, 2 Batch Update Cards by Selected Field(s), and 4 Batch Update INACTIVE Card Numbers.

Figure 2-9-3. Batch Adding Card Numbers

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



The screenshot shows the "CARDTMPL Entry-Master® v5.1.2 Cardholder Batch Update Template" screen dated 09/05/2017. The screen is divided into several sections. On the left, there are fields for Card Number, Department, User ID#, Photo File ID, Type of Card (26 - Std. 26-bit format), Issue Date (09/05/2017), Expiration, Revalidate, I/O Status (F - Forgive), Home Phone, Work Phone, Acc Group 1 (0001 - Base Employee Access), Acc Group 2 (No Group Selected), Acc Group 3 (No Group Selected), Elev Access (0000 - No Elevator Access), User's Notes, and Reader Loc Description. On the right, there is a "NO PHOTO" placeholder, Keypad PIN, ADA/Trace (0 - None), and Nesting Level Information (Card Level: 0, Violations: 0). At the bottom, there is a "Last Badging Message" section with Date, Time, Rdr#, and Stat fields. The screen includes "Save", "Cancel", "Delete", "Back", "Print", and "Help" buttons.

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 [Chapter 2 – Lesson 8](#) (*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 **Selected 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, **stop this lesson and contact your System Administrator 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**):

CARDTMPL Entry-Master® v5.1.2 Cardholder Batch Update Template 09/05/2017	
*> Card Number:	©2001-2017 Entry-Master Systems, LLC. All Rights Reserved.
* Card Database Template to Add by Card Number *	
2> Department:	TECHNICAL SUPPORT
3> User ID#:	
4> Photo File ID:	
5> Type of Card:	26 26 - Std. 26-bit format
6> Issue Date:	10/02/2017 <input type="button" value="Calendar"/>
7> Expiration:	12/31/2017 <input type="button" value="Calendar"/>
8> Revalidate:	<input type="button" value="Calendar"/>
9> I/O Status:	F F - Forgive
10> Home Phone:	
11> Work Phone:	
12> Acc Group 1:	0001 0001 - Base Employee Access
13> Acc Group 2:	---- No Group Selected ----
14> Acc Group 3:	---- No Group Selected ----
15> Elev Access:	0000 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="Back"/> <input type="button" value="Print"/> <input type="button" value="Help"/>	

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):

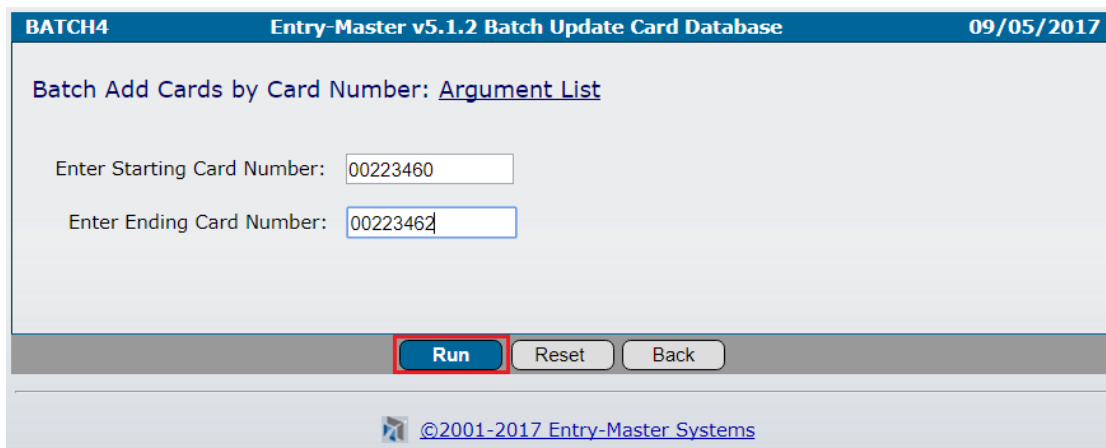


Figure 2-9-6. Selecting the Starting and Ending Card Numbers to Add

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**):

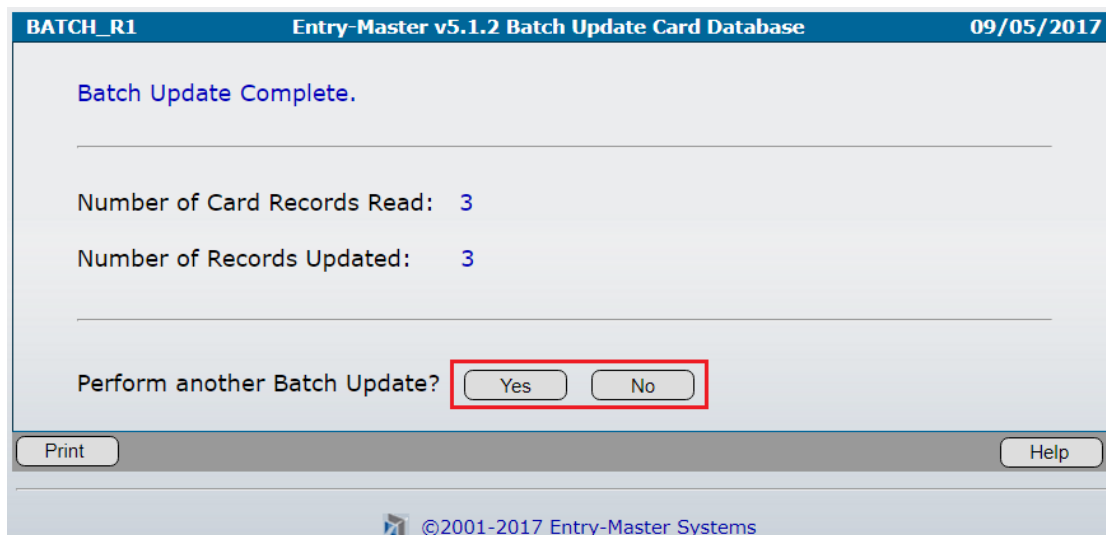


Figure 2-9-7. Batch Update Completed – Perform another Batch Update Query

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 appropriate 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*:

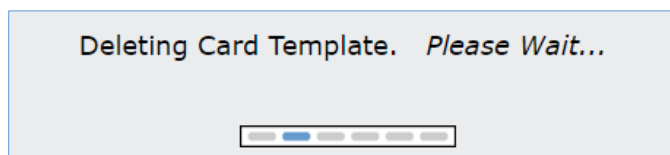


Figure 2-9-8. Deleting the Card Template

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**:

Batch Update Cardholder Menu	
0	Exit Batch Update Card Menu to the Utilities Menu
1	Batch Update Cards by Card Number
2	Batch Update Cards by Selected Field(s)
3	Batch ADD Card Numbers by Card Number
4	Batch Update INACTIVE Card Numbers

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):

CARDTMPL Entry-Master® v5.1.2 Cardholder Batch Update Template 09/05/2017
 * Card Database Template to Update by Card Number *

2> Department:
 3> User ID#:
 4> Photo File ID:
 5> Type of Card: ---- No Type Selected ----
 6> Issue Date: Calendar
 7> Expiration: Calendar
 8> Revalidate: Calendar
 9> I/O Status: S S - Special
 10> Home Phone:
 11> Work Phone:
 12> Acc Group 1: ---- No Group Selected ----
 13> Acc Group 2: ---- No Group Selected ----
 14> Acc Group 3: ---- No Group Selected ----
 15> Elev Access: ---- No Access Selected ----
 F1> User's Notes: [Notes] Reader Loc Description:
 Last Badging Message -->
 Save Cancel Delete Back Print Help

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

- 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

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

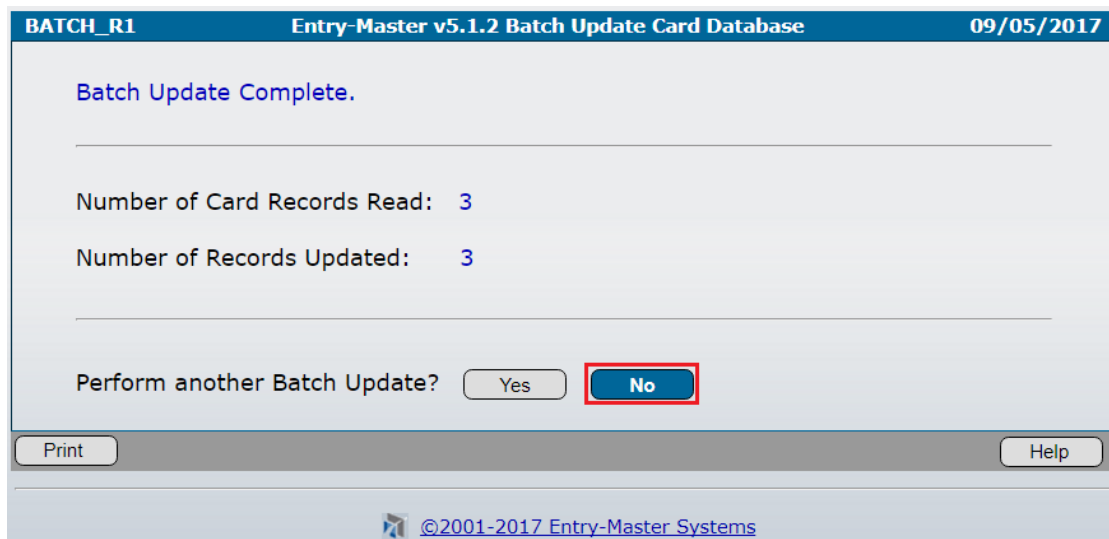


Figure 2-9-13. Batch Update Completed – Perform another Batch Update Query

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**:

Batch Update Cardholder Menu	
0	Exit Batch Update Card Menu to the Utilities Menu
1	Batch Update Cards by Card Number
2	Batch Update Cards by Selected Field(s)
3	Batch ADD Card Numbers by Card Number
4	Batch Update INACTIVE Card Numbers

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):

CARDTMPL Entry-Master® v5.1.2 Cardholder Batch Update Template 09/05/2017
 * Card Database Template to Update by Selected Field *

2>	I/O Status:	0013 - OBP management
3>		0014 - Newspaper Delivery
4>		0015 - Vendor Access
5>	Home Phone:	0016 - Parking.1301.res
6>	Work Phone:	0017 - Test Access Group
7>		0018 - PeopleSoft Access
8>	Acc Group 1:	0015
9>	Acc Group 2:	----
10>		----
11>	Work Phone:	
12>	Acc Group 1:	0015 - Vendor Access
13>	Acc Group 2:	----
14>	Acc Group 3:	----
15>	Elev Access:	----

NO PHOTO

Keypad PIN: ADA/Trace: - None -

Nesting Level Information

Card Level: Violations:

*** Last Badging ***

Date: Rdr#: Time: Stat:

F1> User's Notes: [Notes] Reader Loc Description:

Last Badging Message -->

Save Cancel Delete Back Print Help

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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):

BATCH3 Entry-Master v5.1.2 Batch Update Card Database 09/05/2017

Batch Update Cards by Selected Field: [Argument List](#)

Select Search Field: 01 - User Name
02 - Department
03 - User ID
04 - License Plate
05 - Card Type
06 - Issue Date
07 - Expiration Date
08 - Revalidation Date
09 - I/O Status

Enter Search String: VENDOR Advanced Search

Run Reset Back

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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**:

Batch Update Cardholder Menu

0 Exit Batch Update Card Menu to the Utilities Menu

1 Batch Update Cards by Card Number

2 Batch Update Cards by Selected Field(s)

3 Batch ADD Card Numbers by Card Number

4 Batch Update INACTIVE Card Numbers

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):

The screenshot displays the 'CARDTMPL Entry-Master v5.1.2 Cardholder Batch Update Template' interface. The form includes fields for Card Number, Department, User ID, Photo File ID, Type of Card, Issue Date, Expiration (12/24/2017), Revalidate, I/O Status, Home Phone, Work Phone, Acc Group 1, Acc Group 2, Acc Group 3, Elev Access, User's Notes, and Reader Loc Description. The 'Expiration' field is highlighted, and a 'Calendar' button is visible next to it. A calendar window is open, showing the date 12/24/2017. The 'Save' button at the bottom left is highlighted with a red box.

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:

The screenshot displays the 'BATCH5 Entry-Master v5.1.2 Batch Update Card Database' interface. The form includes a 'Batch Update Inactive Cardholders: Argument List' section with an 'Enter Cut-Off Date for Inactive Cards' field set to 01/01/2017. A 'Calendar' button is visible next to the date field. A calendar window is open, showing the date 01/01/2017. The 'Run' button at the bottom left is highlighted with a red box.

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.

- 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

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

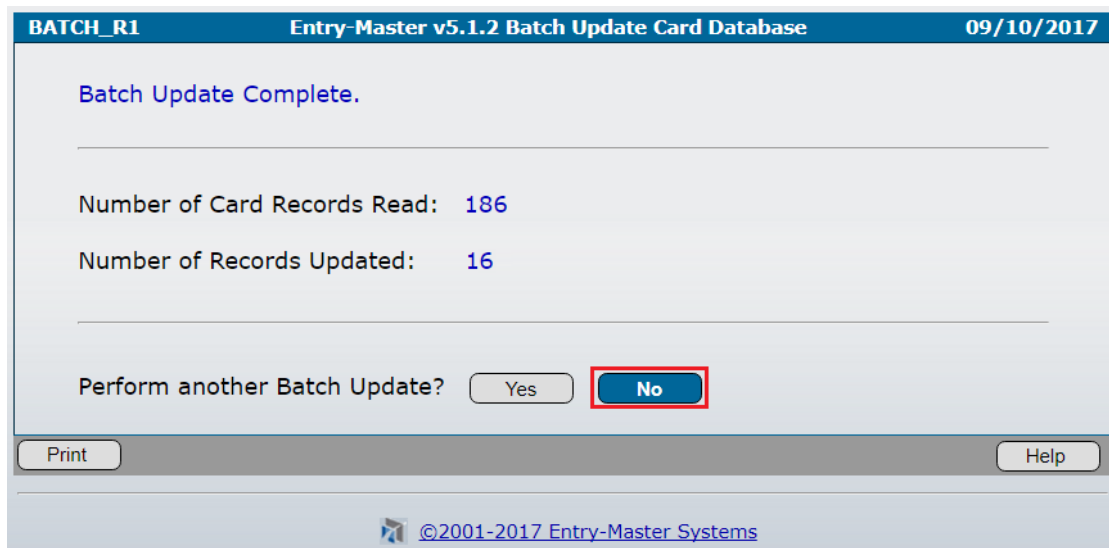


Figure 2-9-21. Batch Update Completed – Perform another Batch Update Query

- At this point, you will need to inform the system whether you wish to perform another batch update, and click the appropriate 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*:

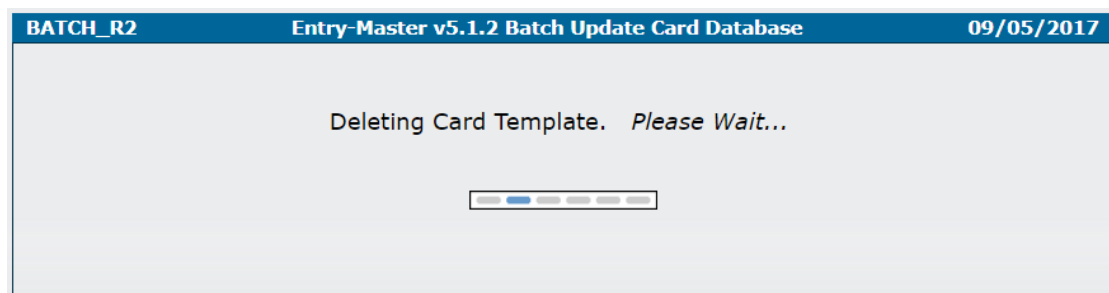


Figure 2-9-22. Deleting the Card Template