Section 1-2

Cardholder records

This section:

- Describes how to enter, edit, view and delete cardholder records.

Every cardholder has a personal record which consists of three pages: the **Card Data** page, the **Personal Data** page and the **Personal AP** page (Personal Access Points). If the Video Badging option is installed then there is a fourth page labelled **Photo ID**. The data in the cardholder record determines how the Card operates within the Access Control System. Note that if you keep records about cardholders, in the UK you may have to register under the Data Protection Act.

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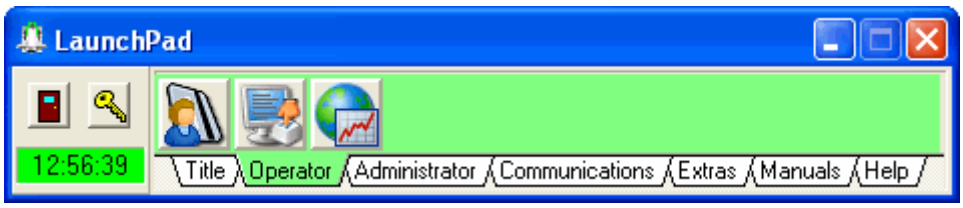
Running the Cardholders program

From LaunchPad



- Click on the button for the Cardholders program:

Entering a new cardholder record

Note: if you want to add a block of consecutively numbered cards, all with the same access level and site code reference, you can use the Add Cards Wizard (described at the end of this section), then edit the cardholder records to enter the cardholder name and other details.

1. Click on the button to display the cardholders form.
2. Click on the **Edit** tab.
3. Click on the + button. The cursor flashes in the **Last Name** field, ready for you to enter a new cardholder record.
4. Enter the data for the new cardholder record as described in the section on "Entering data" below.
5. You can also link the record to the cardholder's portrait and signature. The portrait and signature must already be stored somewhere on your system as jpeg files (**.jpg**) - we recommend that you store them in the **c:\Program Files\Siemens\Granta\sysmgrsql\Portrait** folder and the **c:\Program Files\Siemens\Granta\sysmgrsql\Signature** folder respectively.
6. When you have entered the data for the new cardholder record, save it by clicking on the ✓ button. If the access control system is on line, the data for the new card is downloaded to the Controllers.

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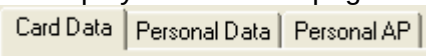
Entering data

To enter data in a field, move the pointer to the field and click the mouse-button. If the field is a text field, the cursor will flash in the field. If the field is an option field, the list of options will open automatically and you can choose the option you want by clicking on it.

To display the different pages of the cardholder record, click on the tabs:



Fields on every page

The following fields appear at the top of all pages.

Last Name

Enter the cardholder's last name in the **Last Name** field.

First Name

Enter the cardholder's first name in the **First Name** field.

Partition

Note: this field is only displayed if your system has been configured to use partitions - see section 2-10 for details of setting up partitions.

If your system uses partitions, click on this field and choose the partition to which this cardholder belongs.

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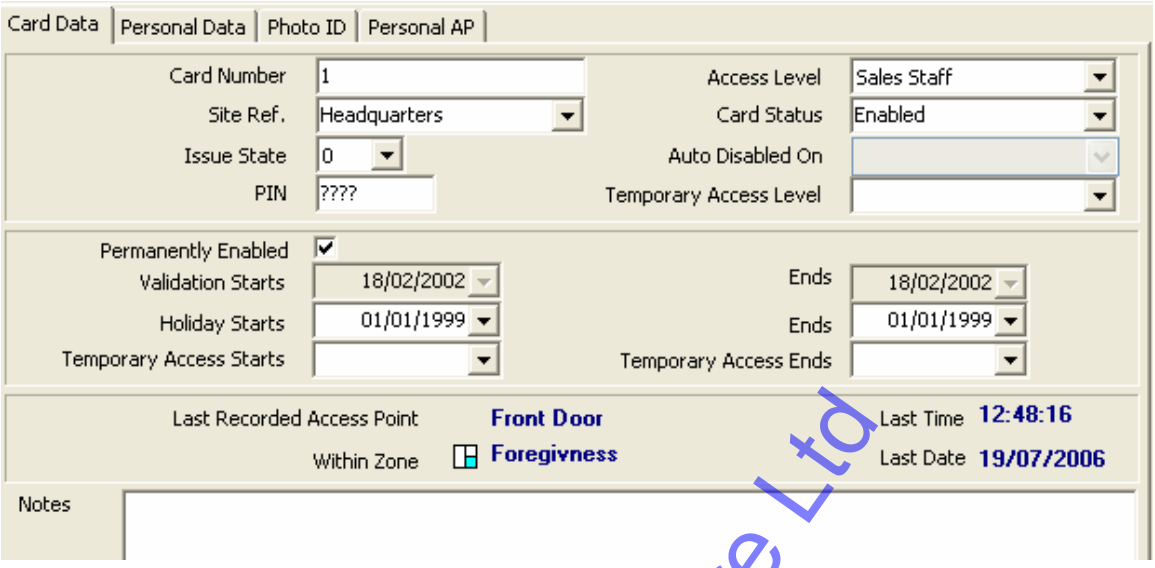
Fields on the Card Data page



Card Number

- Type the Card Number in this field. The range of Card Number you can enter here depends on the setting displayed in the **Card No. Format** field on the Card Reading screen in the System Administration program.

Card No. Format	Card Number Range
0	1 to 65535 (16-bit card numbers)
1	1 to 16777215 (24-bit card numbers)
2	1 to 1073741823 (30-bit card numbers)
3	1 to 4294967295 (32-bit card numbers)

Note: **you must enter a card number in this field**. If you don't, you cannot save the record.

- If the Card Number you have typed already exists in the database, a message is displayed when you attempt to save the record. Choose another Card Number.

Learning the card number from an "Enrolment Reader"

If you don't know the card number, you can get the system to read it from an "Enrolment Reader". You would normally set up this reader next to the computer so you can read the cards easily whilst using the Cardholders program.

1. Run the System Administration program.

2. Display the Access Violation Messages screen, click on the ▲ button, click on the **Cardholder Not Found** field and choose **Report** or **Alarm** from the list, then click on the ✓ button.

3. Also in the System Administration program, display the Card Reading screen, click on the ▲ button, click on the **Enrolment Reader** field

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and choose the reader that you will be using for this purpose from the list, then click on the button.

4. Display the Card Data page in the Cardholders program and, if you have not already done so, click on the button.

5. Get the card read at the Enrolment Reader.

   The **Card Number** and **Site Ref.** and **Issue State** fields are automatically filled in for you.

6. When you have finished entering your new cardholder record, save it in the normal way.

Learning the card number from a Card Programmer

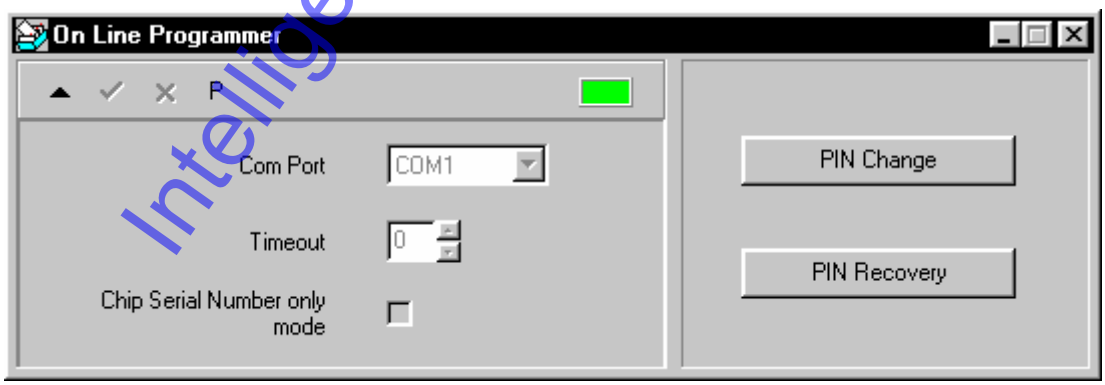
If you don't know the card number, you can get the system to read it from your Card Programmer.

1. Run the System Administration program.

2. Display the Card Reading screen, click on the button, enable the **On Line Programmer** check box, then click on the button.

3. Display the Card Data page in the Cardholders program and, if you have not already done so, click on the button.

   If the button to the right of the **Card Number** field is red, this means that the Programmer is off line. Check that it is connected to the computer's COM port and that the Programmer is powered up. If it still won't go on line, open the **Configure** menu, choose the **On Line Programmer** command and check that the COM port shown in the form is the one to which the Programmer is connected. The box at the top of the form will go green when the Programmer is on line.



4. Place the card on the Programmer and click on the button to the right of the **Card Number** field.

   If the Programmer is logged off, you must now enter the Programmer's PIN.

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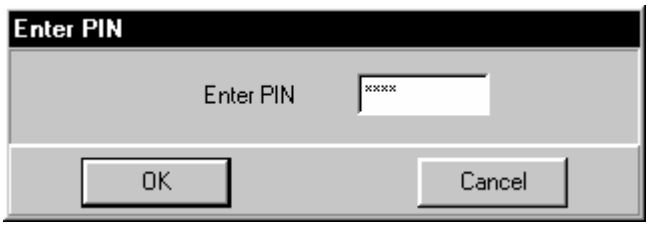

If you have forgotten your PIN, use the **PIN Recovery** feature and contact your supplier. Note: for detailed information about the Programmer, please refer to the Programmer Management Software handbook or help file.

After you have entered the correct PIN, the **Card Number** and **Site Ref.** and **Issue State** fields are automatically filled in for you.

5. When you have finished entering your new cardholder record, save it in the normal way.

Site Ref.

In this field you choose the Site Code Reference name corresponding to the Site Code stored in this Card. A list of site code reference names is displayed when you click on the field. If the list is empty, the site code reference has not been set up in the System Administration program - see your system administrator.

- Choose a Site Code Reference from the list by clicking on it.

Issue State

The issue state is a number from 0 to 7 programmed into each Card. When a Card is first issued, its issue state should be programmed to 0 to match the Issue State field in each cardholder record which initially defaults to 0. If a Card is lost, you can issue the cardholder with a new Card programmed with a higher issue state, for example, 1, and set the **Issue State** field in the cardholder record to 1 as well. When you have done this, the old Card with issue state 0 will not work and so cannot be used to gain access by someone who finds it. This system also has the benefit that the cardholder will always have the same card number in the history files.

- If you want to change the issue state from **0**, click on the **Issue State** field and choose the new issue state of the Card from the list by clicking on it.

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Access Level

The access level determines through which doors the card is allowed and during what times.

- Choose an Access Level from the list by clicking on it.

Refer to your plan of cardholders and their corresponding Access Levels.

If the list of Access Levels is empty, you need to define the Access Levels using the Access Configuration program.

Card Status

This field can be set to **Enabled**, **Disabled**, **Trace** or **Alarm**.

Enabled - this is the default setting for a Card to work normally.

Disabled - the Card will not gain access at any door. You can configure the system so that Controllers will send out an alarm or a non-alarm message when a disabled card is read by setting the **Disabled Card** field on the Access Violation Messages page of the System Administration program to **Alarm** or **Report** respectively.

Trace - if either the **Default Transaction Log Mode** or **Time Frame Mode** in the **Log Files** page of the System Administration program is set to **Trace**, the **Card Status** field in the cardholder record must be set to **Trace** if you want all messages about this Card to be broadcast by the Controllers. If “trace” is in operation and this field is set to anything other than **Trace**, the Controllers transmit no messages to the host computer about this Card unless the Card is read at a “traced” Access Point.

Alarm - the Card is disabled and will not gain access at any door. If the **Alarm Card** field on the Access Violation Messages page of the System Administration program is set to **Alarm**, the Controller sends an alarm message to the host computer when the Card is read. Use this option if a Card is lost or stolen so anyone trying to use it alerts the system.

- If you want to change the card status from **Enabled**, click on the **Card Status** field and choose the new status of the Card from the list by clicking on it.

PIN

- If the cardholder requires a PIN (personal identification number) to gain access to any of the Access Points then either type the PIN in this field (4, 5 or 6 digits), or type **????** which enables the cardholder to choose his or her own PIN the first time they use the system (the number of digits required for cardholders choosing their own PINs is set on the Card Reading page of the System Administration program).

Note: if the cardholder enters a PIN with 1 added to the last digit, this is a “duress PIN” - the cardholder gains access to the door in the normal way and a duress alarm message is sent to the host computer. (If the last digit of the PIN is 9, the last digit for the duress PIN is 0.)

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Temporary Access Level

If you want to give someone temporary access to the system using the **Temporary Access Starts** and **Temporary Access Ends** fields, this access level determines through which doors the card is allowed and during what times.

Validation Starts/Ends

The **Validation Starts** and **Ends** fields specify a period during which the Card is temporarily valid. (If you need to change these fields in any number of cardholder records at the same time, use the **Validation Dates Block Update** command in the **Tools** menu - see below.)

Before you can enter validation dates, you must first click on the **Permanently Enabled** check box to disable it.

The **Starts** field contains the date when the Card becomes valid. The **Ends** field contains the last date on which the card is still valid. For example, if you want a card to be valid for one week from Monday to Friday, you enter Monday's date in the **Starts** field and Friday's date in the **Ends** field.

Note: if you want a Card to be valid for one day, enter the same date in the **Starts** and **Ends** fields.

(By default, Cards are validated at 2am. You can adjust this time by setting the **Daily Housekeeping At** field in the Hardware Systems program to any half hour from 00:35 (12:35am) to 05:05 (5:05am). (If you need to validate the cards immediately, use the **Validation Dates Block Update** command in the **Tools** menu - see below.)

- Disable the **Permanently Enabled** check box.
- Enter the date at which you wish the Card to become valid in the **Starts** field.
- Enter the last date on which you wish the Card to be valid in the **Ends** field.

To enter a date in a field, you use the calendar provided.

1. Open the calendar by clicking on the down-arrow button to the right of the field.

2. To move back a month, click on the button to the left of the month. To move forward a month, click on the button to the right of the month. To

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move back a year, click on the button to the left of the year. To move forward a year, click on the button to the right of the year.

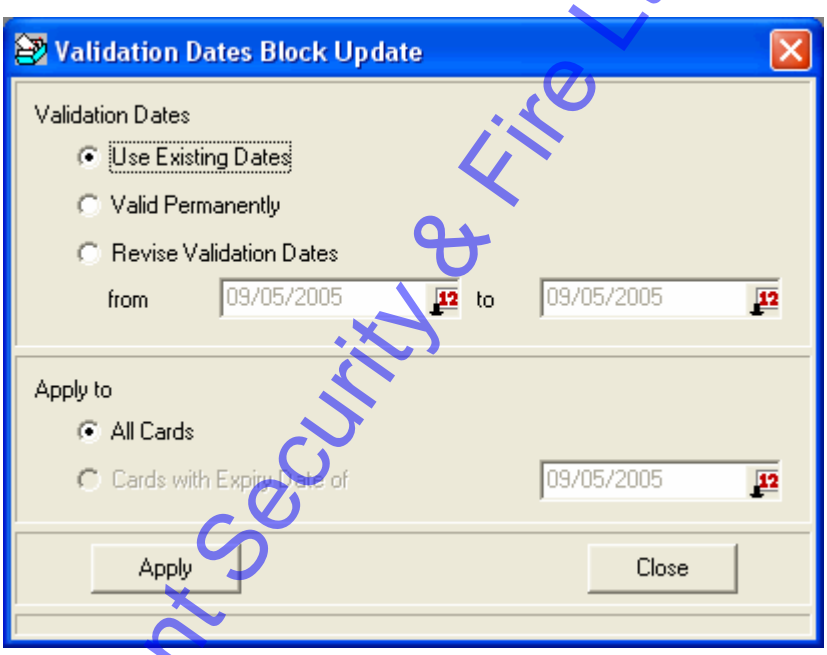
3. Click on a day to enter that date in the field.

4. To enter today's date, click on the **Today** button.

Validation Dates Block Update command in Tools menu

Use this command to validate cards immediately, or to change the validation dates and times in any number of cardholder records at the same time.

1. Open the **Tools** menu and choose the **Validation Dates Block Update** command.



2. To validate all cards immediately, enable the **Use Existing Dates** option, then click on the **Apply** button, then click on the **Yes** button. A box is displayed telling you how many cardholder records were validated. (You might want to validate cards immediately if the system was off line during the "housekeeping" time.)

3. To make cards valid <u>all the time</u>, click on the **Valid Permanently** option button. You can choose either to make <u>all cards</u> valid all the time, or only cards with a <u>specified expiry date</u> (the expiry date is the date in the **Validation Ends** field in the cardholder record).

   - To make all cards valid all the time, click on the **All Cards** option button and then click on the **Apply** button, then click on the **Yes** button. A box is displayed telling you how many cardholder records were changed.

   - To make cards with a specified expiry date valid all the time, click on the **Cards with Expiry Date of** option button, choose the expiry date you want using the calendar, then click on the **Apply**

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button, then click on the **Yes** button. A box is displayed telling you how many cardholder records were changed.

4. To change the validation dates of all cards, or of cards with a specified expiry date, click on the **Revise Validation Dates** option button and set the date on which you want the cards to become valid in the **from** field, and the last date on which you want the cards to be valid in the **to** field.

   - To change the validation dates of all cards, click on the **All Cards** option button and then click on the **Apply** button, then click on the **Yes** button. A box is displayed telling you how many cardholder records were changed.

   - To change the validation dates of cards with a specified expiry date, click on the **Cards with Expiry Date of** option button, choose the expiry date you want using the calendar, then click on the **Apply** button, then click on the **Yes** button. A box is displayed telling you how many cardholder records were changed.

Holiday Starts/Ends

These two fields specify a period during which the Card is temporarily invalid. (Note: this is not affected by the **Permanently Enabled** check box: the Card still becomes invalid between the holiday dates.)

The **Starts** field contains the date when the Card becomes invalid. The **Ends** field contains the last date on which the card is still invalid. For example, if you want a card to be invalid while someone goes on holiday from Monday to Friday, you enter Monday's date in the **Starts** field and Friday's date in the **Ends** field.

When the holiday period is over, the two fields become blank.

A Card whose **Card Status** field is set to **Trace** is no longer traced after a holiday: the **Card Status** field is set to **Enabled**. A Card whose **Card Status** field is set to **Alarm** remains an Alarm Card after a holiday.

Note: if you want a Card to be disabled for one day, enter the same date in the **Starts** and **Ends** fields.

(By default, Cards are validated at 2am. You can adjust this time by setting the **Daily Housekeeping At** field in the Hardware Systems program to any half hour from 00:35 (12:35am) to 05:05 (5:05am).

- Enter the date when the cardholder goes on holiday in the **Starts** field.

- Enter the date of the last day of the cardholder's holiday in the **Ends** field.

(See **Validation Starts /Ends** for details of how to enter a date using the calendar.)

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Temporary Access Starts/Ends

These two fields specify a period during which the Card is temporarily enabled. While temporarily enabled, it has the temporary access level specified in the **Temporary Access Level field**.

The **Starts** field contains the date when the Card becomes enabled. The **Ends** field contains the last date on which the card is still enabled. For example, if you want a card to be enabled for one week from Monday to Friday, you enter Monday's date in the **Starts** field and Friday's date in the **Ends** field.

Note: if you want a Card to be valid for one day, enter the same date in the **Starts** and **Ends** fields.

(By default, Cards are validated at 2am. You can adjust this time by setting the **Daily Housekeeping At** field in the Hardware Systems program to any half hour from 00:35 (12:35am) to 05:05 (5:05am).

When the temporary access period is over, the two fields become blank.

- Enter the date when the card should be enabled in the **Starts** field.
- Enter the date after which the card should be disabled in the **Ends** field.

(See **Validation Starts /Ends** for details of how to enter a date using the calendar.)

Last Recorded Access Point Last Time

Within Zone Last Date

These are information fields - see "Cardholder record information fields" in "Viewing the cardholder records" section.

The button enables you to put a Card in a chosen zone manually. You need to do this when a Card is in the wrong zone and the cardholder is being refused access because of anti-passback access violations.

- Click on the button.
- Click on the zones list box which is displayed next to the button and choose the zone you want the card to be in from the list (the best way to get a card working again is to put it in the **Forgiveness** zone).

Notes

This is just a text field in which you can write any comments (up to 256 characters including spaces).

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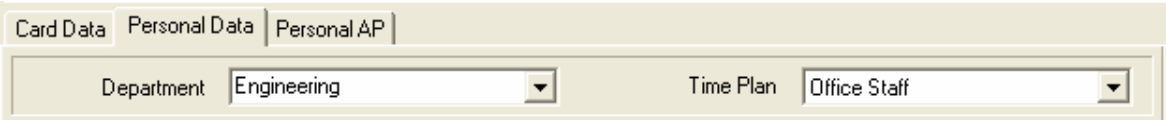
Fields on the Personal Data page



The only fields on the Personal Data page by default are the **Department** and the **Time Plan**.

You can add your own fields to the Personal Data page using the **Personal Data Fields** function.

Department

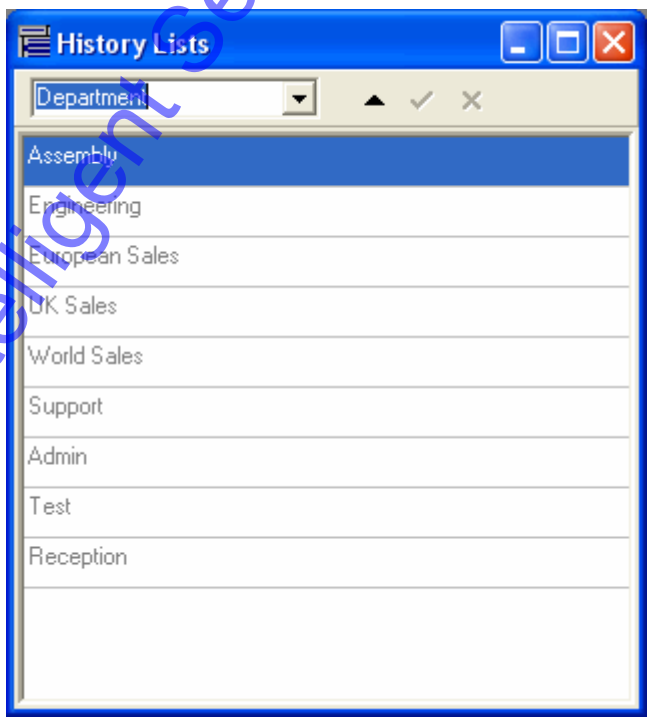
The **Department** field is optional, but is used by some of the reports.

- Either: click on the arrow to the right of the **Department** field and choose the department you want from the list.
- Or: click in the **Department** field and type in the name of the department you want.

Note: if you type in a department name, it is automatically added to the list of departments that you display by clicking on the arrow to the right of the **Department** field.

To edit or remove a department name from the list, do the following:

1. Open the **Configure** menu and choose the **History Lists** command.



2. Click on the ▲ button.

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3. To delete a name, click on it then click on the button.
4. To change a name, click on it until the cursor appears, then type and delete text at the cursor.
5. To add a new name to the list, click on the button to add a blank line, then click on the blank line and type the new name.
6. If you make a mistake, click on the button to cancel all the changes you have made.
7. When you have finished, click on the button to save the changes.

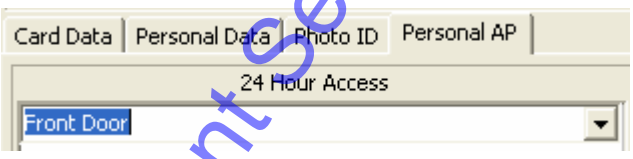
Time Plan

The **Time Plan** field is optional, but is used by the 48 Hour Week reports. If a cardholder record is linked to a Time Plan using this field, the cardholder must get his or her card read at an IN Reader on arrival for work, and must get his or her card read at an OUT Reader on leaving work. IN and OUT Readers must be configured specifically for this purpose using the Access Configuration program.

- Click on the **Time Plan** field and choose the Time Plan you want from the list.

If the list is empty, you need to configure your Time Plans using the System Administration program.

Fields on the Personal AP page



The **Personal AP** page enables you to choose up to sixteen “personal access points” which this cardholder is allowed access through, even if the access points are not in this cardholder’s access level. These personal access points are not linked to a Time Frame: the cardholder can gain access to them 24 hours a day, 7 days a week and holidays.

- Click on one of the fields, then click on the arrow to the right and choose an access point from the list.
- To delete a personal access point, click on it so it is highlighted, then press the **Delete** button on your keyboard.

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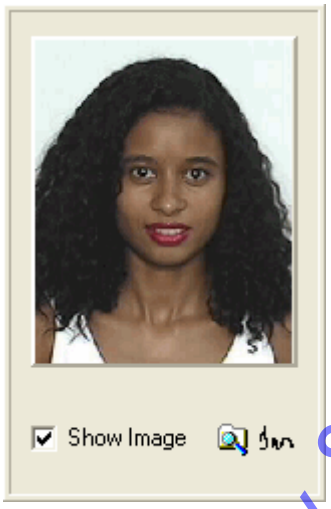
Linking the cardholder record to the cardholder's portrait and signature

The portrait and signature must already be stored somewhere on your system as jpeg files (**.jpg**) - we recommend that you store them in the **c:\Program Files\Siemens\Granta\sysmgrsql\Portrait** folder and the **c:\Program Files\Siemens\Granta\sysmgrsql\Signature** folder respectively.



Portrait

If you have an image of the cardholder's portrait stored on your computer or file server or on a memory card plugged into a card reader on your computer, you can link the cardholder record and image as follows:

1. Display the cardholder record on the screen.

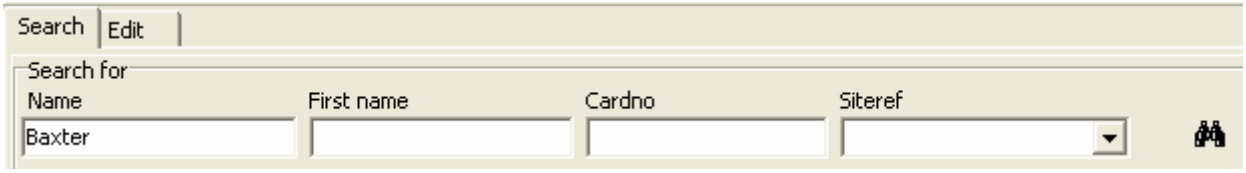
   If you are entering the cardholder record for the first time, it will already be displayed.

   If not, click on the **Search** tab and either:

   - Click on the button to display a list of all the cardholders in your system.

   or:

   - Enter some details about the cardholder you want to find in the search fields as shown below, then click on the button.



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- Click on the cardholder in the list, then click on the **Edit** tab.

Cardno	Last Name	First name	Department	Telno	Siteref
0000000003	Ampersand	Catherine	Assembly		Headquarters
0000000045	Baker	Bert	Test		Headquarters
0000000001	Baxter	Louise	European sales		Headquarters
0000000832	Bell	Lucy	Support		Headquarters
0000000002	Blenny	Betty	European sales		Headquarters
0000000016	Clark	Shanei	UK sales		Headquarters
0000000066	Crab	Kirsten	Assembly		Headquarters
0000000666	Curtis	Dave	Admin		Headquarters

- If the fields on the cardholder form are all grey, click on the button to edit the record.

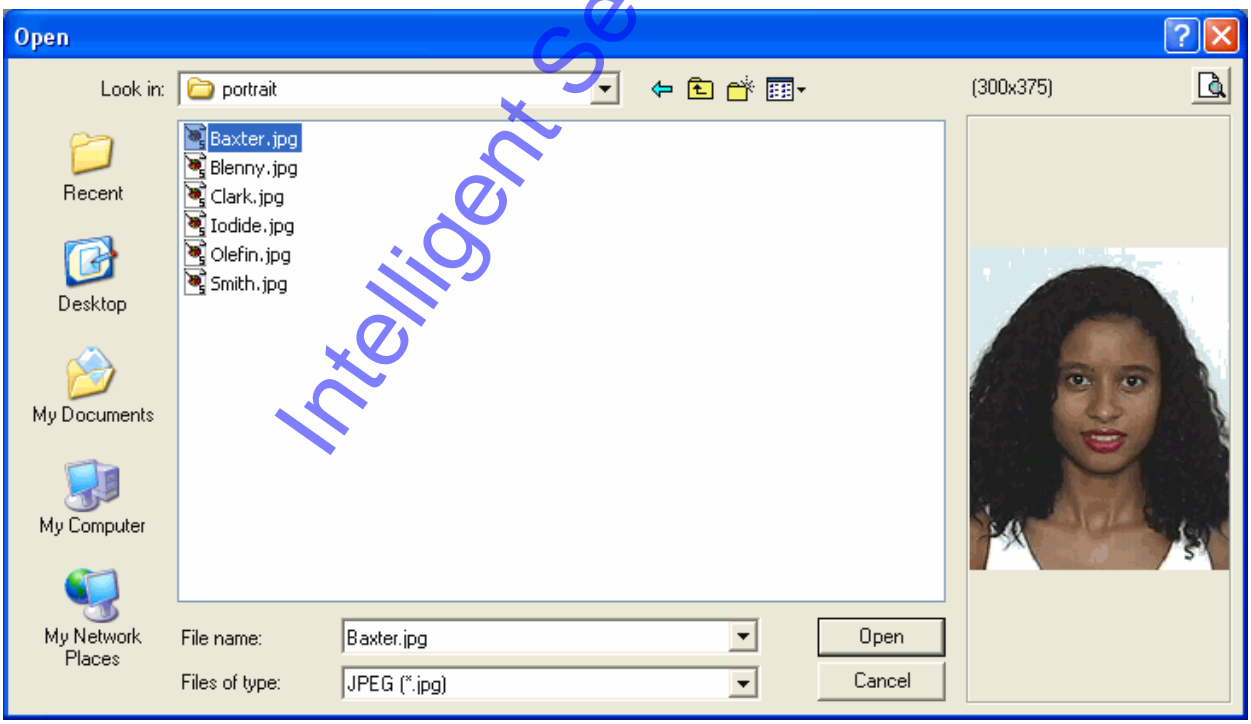
2. If the portrait button is displayed at the bottom right, click on it to display the signature button as shown above.

3. Make sure that the **Show Image** check box is ticked as shown above.

4. Click on the button.

5. Find the folder on your computer or file server or card reader where your cardholder images are stored (usually **c:\Program Files \Siemens\Granta\sysmgrsql\Portrait**).

6. Click on the image you want. The image is displayed in the space on the right side of the screen.



7. Click on the **Open** button.

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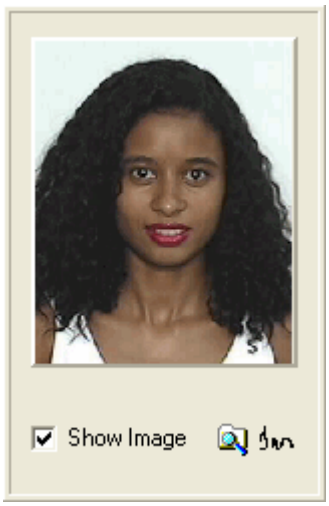
The portrait is displayed in the cardholder record:



8. Click on the button to save the cardholder record linked to this portrait.

Signature

If you have an image of the cardholder's signature stored on your computer or file server or on a memory card plugged into a card reader on your computer, you can link the cardholder record and signature as follows:

1. Display the cardholder record on the screen.

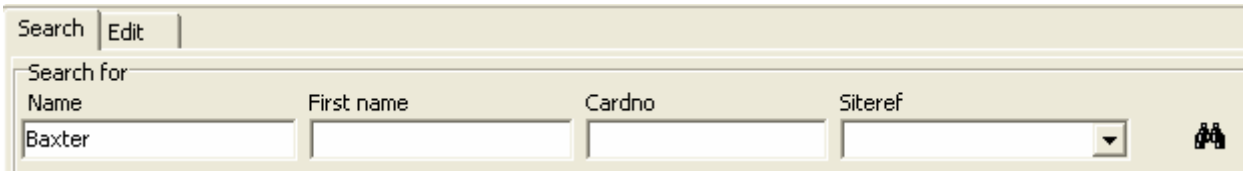
   If you are entering the cardholder record for the first time, it will already be displayed.

   If not, click on the **Search** tab and either:

   - Click on the button to display a list of all the cardholders in your system.

   or:

   - Enter some details about the cardholder you want to find in the search fields as shown below, then click on the button.



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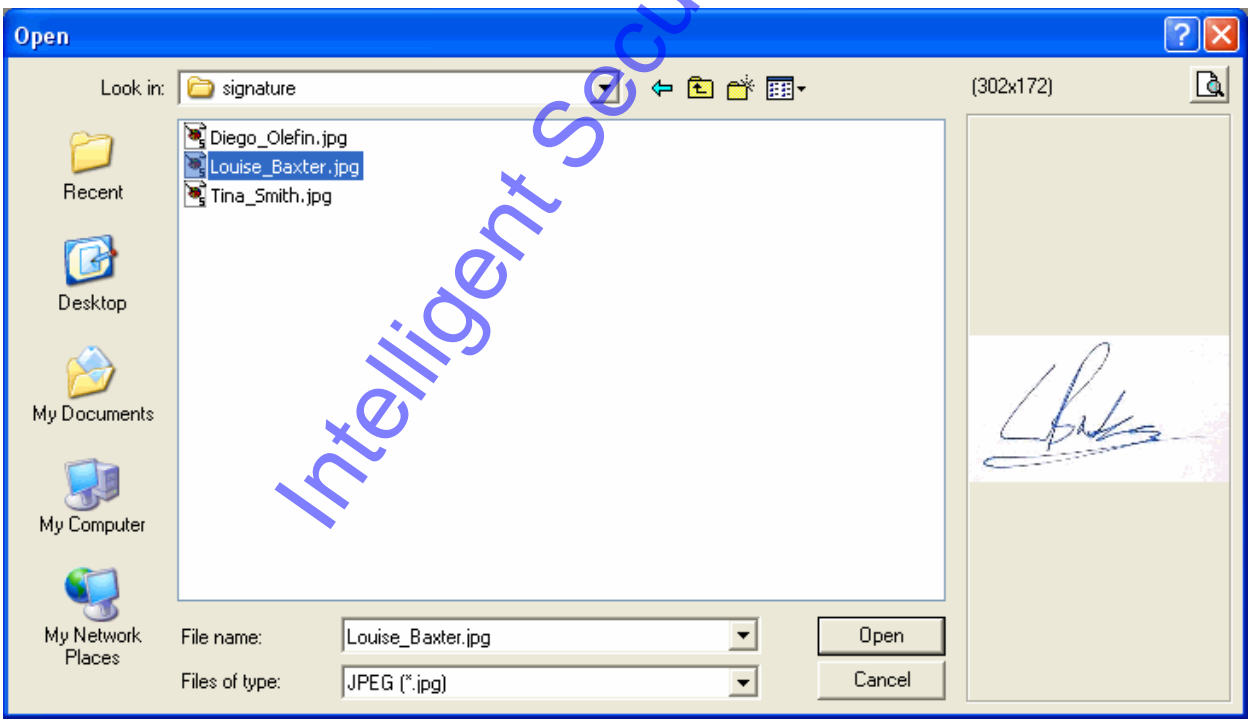
- Click on the cardholder in the list, then click on the **Edit** tab.

Cardno	Last Name	First name	Department	Telno	Siteref
0000000003	Ampersand	Catherine	Assembly		Headquarters
0000000045	Baker	Bert	Test		Headquarters
0000000001	Baxter	Louise	European sales		Headquarters
0000000832	Bell	Lucy	Support		Headquarters
0000000002	Blenny	Betty	European sales		Headquarters
0000000016	Clark	Shanei	UK sales		Headquarters
0000000066	Crab	Kirsten	Assembly		Headquarters
0000000666	Curtis	Dave	Admin		Headquarters

- If the fields on the cardholder form are all grey, click on the button to edit the record.

2. Click on the signature button which is displayed at the bottom right of the cardholder record screen.
3. Make sure that the **Show Image** check box is ticked.
4. Click on the button.
5. Find the folder on your computer or file server or card reader where your cardholder signatures are stored (usually **c:\Program Files \Siemens\Granta\sysmgrsql\Signature**).
6. Click on the signature you want. The image is displayed in the space on the right side of the screen.



7. Click on the **Open** button.

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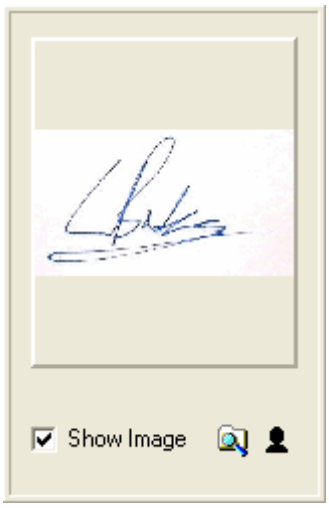
To see the signature displayed in the cardholder record, click on the button:



8. Click on the button to save the cardholder record linked to this signature.

Viewing the cardholder records

You can view the cardholder records either by using the navigating buttons, or by opening the list box at the top left of the screen and choosing a cardholder from the list.

You can switch between the signature and portrait by clicking on the button or the button.

Cardholder record information fields

A number of fields in the cardholder record display information which you can see when you view the records in the working group.

PIN

This field may display **????** or ******** or blank.

If the field contains **????**, the cardholder has not yet chosen his or her PIN. If the field contains ******** then the cardholder has chosen or been given a PIN. If the field is blank the cardholder does not use a PIN.

To give a PIN type one in.

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Last Recorded Access Point, Last Time, Last Date

These fields display the name of the last Access Point at which the Card was read, and the time and date of reading. Provided the system is on line, this field is updated in real time, so the person watching the screen can see where the cardholder moves around the system.

Within Zone

This field shows the global anti-passback zone / roll call zone which the Card is currently in (if zones have been set up in the Access Configuration program). Provided the system is on line, this field is updated in real time.

Show Image

If the cardholder record is linked to a portrait and/or signature image file, select the **Show Image** check box to display the cardholder's portrait or signature.

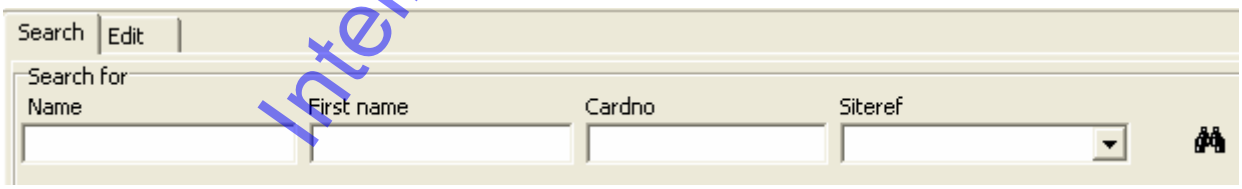
You can switch between the portrait and signature by clicking on the button or the button.

Using the search function

- If you want to see a list of all the cardholders in your system, click on the button to clear any existing search, then click on the button.

If you have a large number of cardholders in your system, it is easier to work with a smaller group of cardholder records which you can choose by setting up a filter. For example, you could search for all cardholders whose last name begins with B, or all cardholders whose last name begins with B and whose access level is Office Staff.

The following are the fields you can use in your search:



You can search on any one of these fields, or on a combination. Usually, you will want to enter a name or part of a name in the **Last Name** field, or a card number in the **Card Number** field.

If you enter, for example, the single letter "B" in the **Last Name** field, the search will find all cardholder records whose last name begins with B.

If you have a multi-site system, you can either search all sites (by leaving the **Site Ref.** field empty), or you can search one site only (by choosing its Site Code Reference in the **Site Code Ref.** field).

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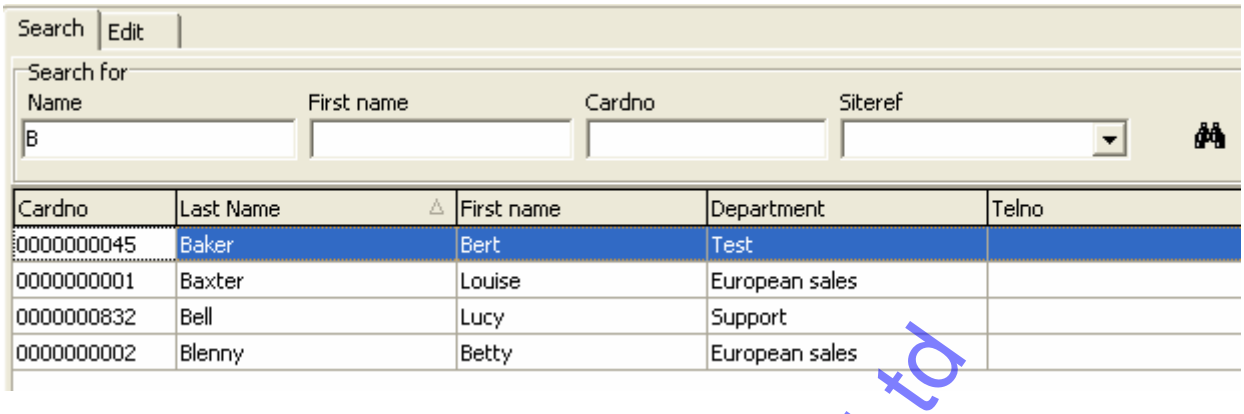
1. Enter B in the name field.

2. Click on the button.



After a search, the bottom of the screen shows you the number of cardholder records found which match your settings (4 Carddholders in this case).

3. To view or edit one of the cardholder records, click on it in the list, then click on the **Edit** tab.

To clear the search settings, click on the button.

Note that only the records which match the search settings can be displayed until you click on the button to clear the search settings.

Editing a cardholder record

If you want to change an existing cardholder record in any way, take the following steps:

1. Display the cardholder record you want to edit on the **Search** tab screen, as described in "Using the search function".

2. Click on the cardholder record you want to edit, then click on the **Edit** tab.

3. Click on the button.

4. Edit the record. (The fields in the record are described in the previous section on “Entering a new cardholder record”.)

5. Click on the button to save the changes.

   Note: if you want to learn a new card number for this record using an “Enrolment Reader” as described in the section on entering a new cardholder record, you must first click on the **Card Number** field and delete the existing card number. Then get the card read at the Enrolment Reader in the normal way. The **Card Number** field must be blank to learn the new card number.

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Deleting a cardholder record

1. Display the cardholder record you want to edit on the **Search** tab screen, as described in "Using the search function".

2. Click on the cardholder record you want to edit, then click on the **Edit** tab.

3. Click on the button.

Using the Add Cards Wizard to enter a block of consecutively numbered cards

Note: the Add Cards Wizard adds a block of consecutively numbered cards to the cardholder database stored in the computer and, if the system is on line, it downloads the new cardholder records to the Controllers.

1. Click on the Setup Wizard icon in LaunchPad, then log on using your name and password.

2. Click on the **Add New Cards To Existing System** option button, then click on the **Next** button, wait for the next screen and click on the **Next** button again.

3. Enter the following and then click on the **Next** button:

   - **Site Code** - enter your site code - this is the actual site code in decimal - not the site code reference number. Warning: if you enter a site code which does not exist, the Wizard will create it and all the cards you add using the Wizard will be allocated this new site code.

   - **Site Name** - enter the name of your site if it is not correct already. Warning: if you enter a site name which is different from the one already stored in the database, the Wizard will change the site name to what you type here.

   - **Access Level** - click on the list box and choose the access level which you want the new block of cards to have.

   - **First Card Number** - enter the number of the first card in the block of cards you want to add - make sure you don't overlap the new block of cards with any existing ones.

   - **Last Card Number** - enter the number of the last card in the block of cards you want to add.

   - **Enable Cards** - this check box must be selected for the new block of cards to be able to unlock the doors. Note: if you want to add a new block of cards for allocation to cardholders in the future, click

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on this check box so that the new cards are all disabled - you can then enable a card as and when you allocate it to a cardholder.

4. Click on the **Next** button.

5. Wait while Setup Wizard adds the new cardholder records, make sure the **Start LaunchPad** check box is not selected, then click on the **Finish** button.

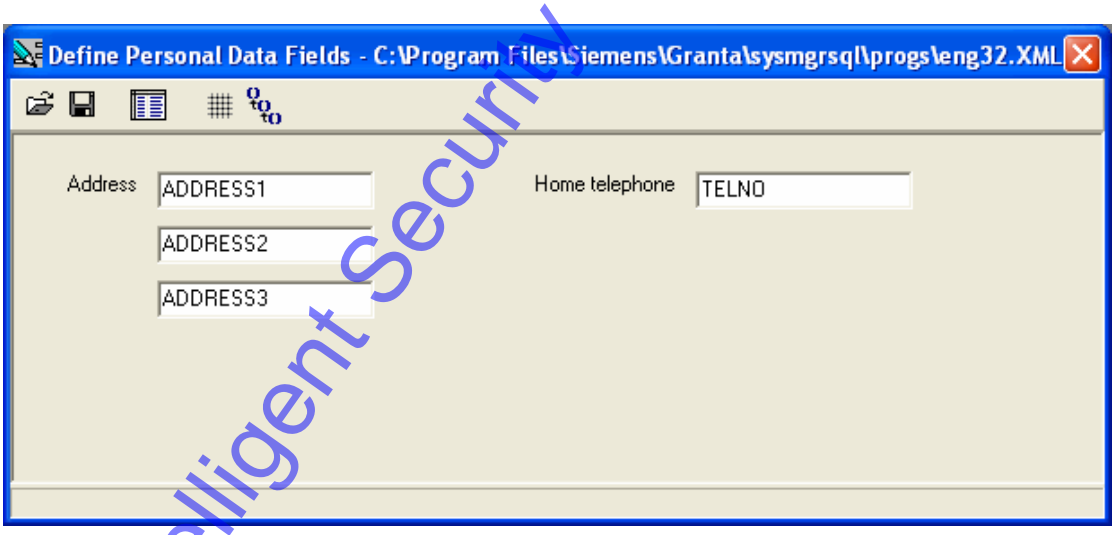
The new card records are now stored in the cardholder database. Use the Cardholders program to check that they have the correct site code. You can enter the cardholder name and other details by editing the cardholder record as described earlier.

Personal Data Fields

The Personal Data Fields feature enables you to edit the Personal Data page so that it contains the information you want, displayed as you want.

In version 5 of the software the layout of the fields is stored in a **.xml** file. In version 4 of the software it was stored in a **.dbf** file.

Here is an example layout:



This shows the labels (outside the boxes) and the field names (inside the boxes). The Personal Data Fields feature enables you to:

- edit/delete labels
- move labels
- add new labels
- move fields
- add new fields
- resize new fields

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- delete new fields
- order the fields (choose which field the cursor goes to when the user presses the **Tab** key)

When you have finished, you save the file and distribute it to your customers.

Creating a new Personal Data page layout

Displaying the Personal Data Fields form

- Click on the button to display the form on which you create your new layout.

Aligning your fields and labels using the grid

- Click on the button and choose the grid size in pixels to align your fields and labels, for example: **X Grid** = 10 and **Y Grid** = 10. Enable the **Snap To Grid** check box and click on the **OK** button.

Adding a label

1. Right-click anywhere on the blank part of the form and choose the **New Label** command from the pop-up menu.
2. Type the text you want to appear on the finished page, for example: Address, then click on the **OK** button.
3. Drag the label to where you want it on the form. The grid will make it easy to align with other fields and labels.

Adding a field

1. Right-click anywhere on the blank part of the form and choose the **New Edit Field** command from the pop-up menu.
2. Click in the list box to see the list of available fields.

   Several fields are provided by default and you can choose any of these. If you want to create your own fields, see the next section.
3. Click on the field you want from the list, for example: ADDRESS1, then click on the **OK** button.
4. Drag the field to where you want it on the form. The grid will make it easy to align with other fields and labels.

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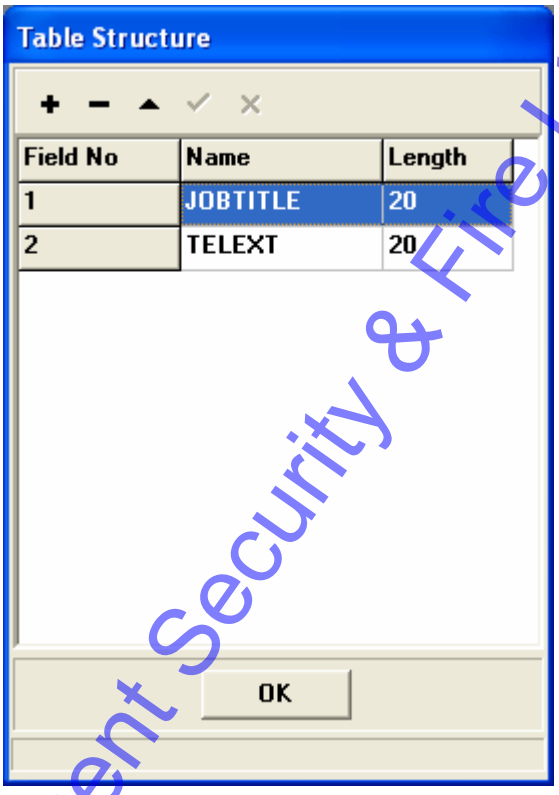
Defining or editing your own fields

Note: before you do this, you must close System Manager and all other copies of the Cardholders program on all computers on your network. Preferably, the Cardholders program which you are using to define or edit the fields should be the only part of the access control software which is running on your whole system.

You can define your own field, or change the length of one of your own fields, or delete one of your own fields.

1. Click on the button.



Note: when you first look at the Table Structure there are two fields already defined as shown above – you must not delete or edit either of these two fields.

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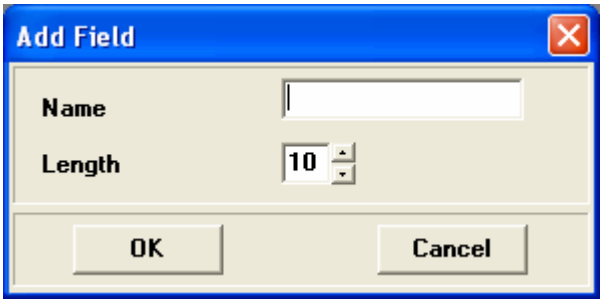
2. To add a new field, click on the button.



3. Enter the name of the field in the **Name** field (note: this is not the text that appears on the finished page - it is the name of the field and must be different from the names of all other fields).

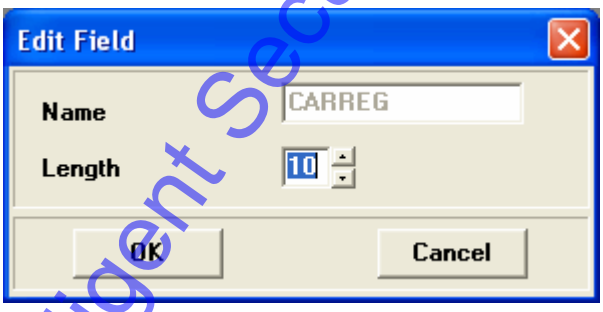
4. Choose the number of characters the field can hold in the **Length** field.

5. Click on the **OK** button.

   The new field automatically appears at the end of the list.

6. Click on the button to save the new field.

7. To change the length of one of your own fields, click on the field then click on the button, then click on the **OK** button to acknowledge the warning message, then click on the next **OK** button.



8. Change the length of the field (in characters), then click on the **OK** button, then click on the button to save the changes.

9. To delete one of your own fields, click on the field then click on the button, then click on the **OK** button to acknowledge the warning message, then click on the next **OK** button.

10. When you have finished adding, editing and deleting fields, click on the **OK** button to return to the Personal Data Fields form.

Setting the Tab Order of the fields

On the finished page you can press the Tab key to move from field to field. You can choose the order in which the fields are visited.

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1. Click on the button.

   The **Tab Order** box shows the sequence in which the fields are visited when you press the **Tab** key.

2. To move a field in the list, click on the field to highlight it.

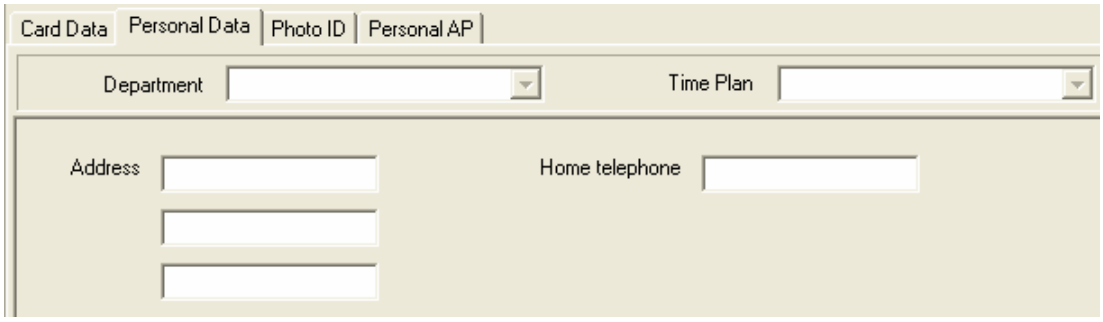
3. Click on either the up arrow or down arrow button until the field is in the position you want.
4. Repeat steps 2 and 3 until the whole sequence is correct, then click on the **OK** button.

Saving your layout

- When you have all the fields and labels placed where you want them, click on the button to save your Personal Data page layout. You should save the layout in your **c:\Program Files\Siemens\Granta\sysmgrsql\progs** folder (assuming you used the default paths when you installed the software). If you are using English, the file must be called **eng32.xml**, **fra32.xml** for French, **ger32.xml** for German, **spa32.xml** for Spanish. Note: you must save the new layout in the **c:\Program Files\Siemens \Granta\sysmgrsql\progs** folder on every computer on your network which has the cardholders program installed.

Looking at your layout

When you display the Personal Data page of your Cardholder records, you will now see your new layout, as shown in the example below.



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You can edit your cardholder records and enter data in the new fields.

Editing your Personal Data page layout

Displaying the Personal Data Fields form

- Click on the button to display the form on which you can edit your layout. Your existing layout will automatically be displayed on the form.

Displaying a layout from version 4 of the software

- Click on the button and load your old layout. This will be a **.dbf** file stored in the **c:\sysmgr32\progs** folder of your old version 4 software.
- Save the layout as a **.xml** file in the **c:\Program Files\Siemens \Granta\sysmgrsql\progs** folder as described earlier in "Saving your layout".

Moving a field

- To move a field, click on its box and drag it to where you want it on the screen.

Moving a label

- To move a label, click on the label and drag it to where you want it on the screen.

Moving a group of fields and/or labels

- To move a group of fields and/or labels, hold down the **Shift** key and click on each of the fields and labels you want to move.
- Drag the group to where you want it on the screen.

Resizing a field

- To resize a field, click on its box. It is displayed with eight handles:

- To resize the field, drag one of the handles to the new size.

The new size will be how the field appears on the finished page - it does not determine how many characters you can type into the field -

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you must do this using the button as described in the earlier section on “Defining or editing your own fields”.

Changing the number of characters in a field

- Use the button as described in the earlier section on “Defining or editing your own fields”.

Adding a new field

1. Right-click anywhere on the blank part of the form and choose the **New Edit Field** command from the pop-up menu.
2. Click in the list box to see the list of available fields.

   Several fields are provided by default and you can choose any of these. If you want to create your own fields, see the next section.
3. Click on the field you want from the list, for example: ADDRESS1, then click on the **OK** button.
4. Drag the field to where you want it on the form.

Adding a new label

1. Right-click anywhere on the blank part of the form and choose the **New Label** command from the pop-up menu.
2. Type the text you want to appear on the finished page, for example: Address, then click on the **OK** button.
3. Drag the label to where you want it on the form.

Editing label text

1. To change the text in a label, right-click on the label and choose the **Edit** command from the pop-up menu.
2. Type the label text.
3. Click on the **OK** button.

Deleting a label

- To delete a label, right-click on the label you want to delete and choose the **Delete** command from the pop-up menu.
- Click on the **Yes** button.

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Deleting a field

- To delete a field, right-click on the field you want to delete and choose the **Delete** command from the pop-up menu.
- Click on the **Yes** button.

Deleting a group of fields and/or labels

- To delete a group of fields and/or labels, hold down the **Shift** key and click on each of the fields and labels you want to delete.
- Right-click on one of the fields or labels and choose the **Delete** command from the pop-up menu.
- Click on the **Yes** button.

Using Data Exchange

The Data Exchange feature enables you to export cardholder records from the access control system to another system, or to import cardholder records from another system into the access control system.

Setting up the Cardholders program so that changes made to the cardholders database are added to the export file

1. Open the **Configure** menu and choose the **Data Exchange** command.

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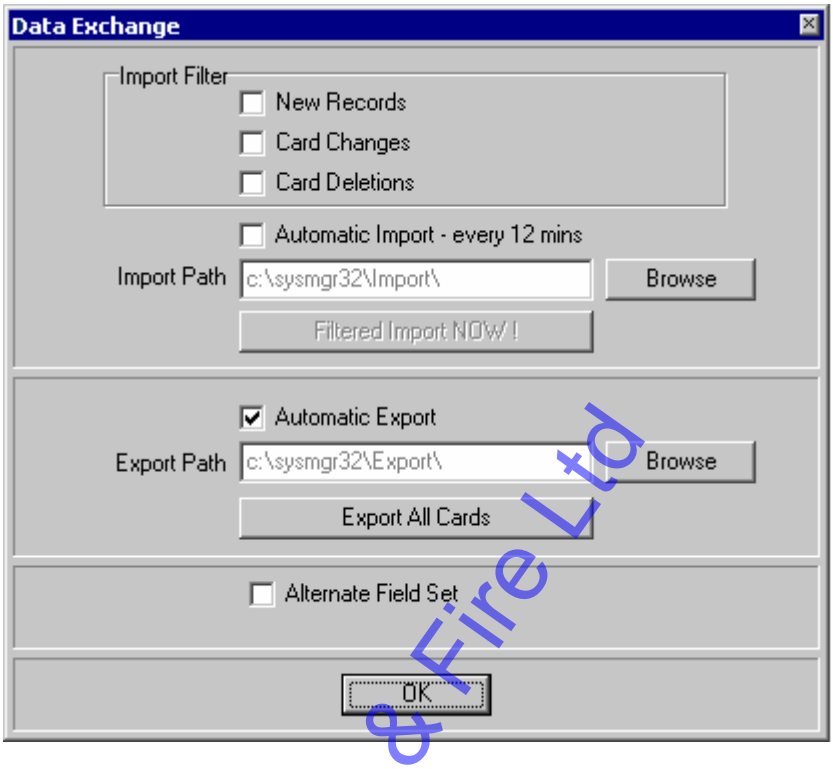
2. Enable the **Automatic Export** check box.



3. Make sure the **Export Path** points to the **export** directory created during installation. If you need to change the path, use the **Browse** button.

4. Click on the **OK** button.

Alternate Field Set check box de-selected

With the **Alternate Field Set** check box de-selected (as shown in the picture above), whenever you add a new cardholder record, delete a cardholder record, or change a cardholder record using the Cardholders program, the card number, site code, cardholder first name and cardholder last name are added to the file called **bprif.exp** in the **export** directory. This file should be read by the third party program and used to update its own database. The **bprif.exp** file should then be deleted from the **export** directory; a new one will be created as soon as any more changes are made.

The card number is padded with leading zeros to make the length five characters, for example 00171. The site code is also padded with leading zeros to make the length five characters, and is then stored in front of the card number to make a ten (10) character number which is saved in the **bprif.exp** file's *CardNo* field.

Note: whenever you save a cardholder record, another line is added to the **bprif.exp** file only if a change has been made to the card number, site code, cardholder first name or cardholder last name.

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Alternate Field Set check box selected

With the **Alternate Field Set** check box selected, whenever you add a new cardholder record, delete a cardholder record, or change a cardholder record using the Cardholders program, all of the following fields are added to the file called **bprif.exp** in the **export** directory:

RECSTAT	-	Status of record A = Added, C = Changed, D = Deleted.
CARDIDNO	-	Unique Record Identifier
NAME	-	Last Name
FIRSTNAME	-	First Name
CARDNO	-	Card Number with leading zeros (10 digits)
SITEREF	-	Site Code Name (as allocated to card)
LEVEL	-	Access Level Name (as allocated to card)
CARDUSE	-	Enabled, Disabled, Trace, Alarm (as allocated to card)
VALID_FROM	-	Valid from Date
VALID_TO	-	Valid to Date
PERM_ENABL	-	Permanently Enabled status
DEPT	-	Department
ADDRESS1	-	} Address field
ADDRESS2	-	} "
ADDRESS3	-	} "
ADDRESS4	-	} "
TELNO	-	} Telephone Field
CARNO	-	} Car Registration Number field
*UDF0	-	} Personal title
*UDF1	-	}
*UDF2	-	}
*UDF3	-	}
*UDF4	-	}
*UDF5	-	}
*UDF6	-	}
*UDF7	-	}
*UDF8	-	}
*UDF9	-	}

For this set to be used the CARDIDNO is a unique number generated when new cardholders are entered.

Fields in the export file are separated by ; characters, for example:

A;2961060740;Bloggs;Joe;0000054321;Headquarters;everywhere;Enabled;17/12/2001;17/12/2001;True;Cleaners;;;;;;;;;;;;;;;;;

*If the "User Defined Fields" (marked UDF) are not present, a blank field is exported: ;;

Exporting details of <u>all</u> the cardholder records

To save in the **bprif.exp** file details of <u>all</u> the cardholder records in the access control system database, open the **Configure** menu in the Cardholders program, choose the **Data Exchange** command, then click on the **Export All Cards** button. Note that this overwrites all existing data stored in the **bprif.exp** file.

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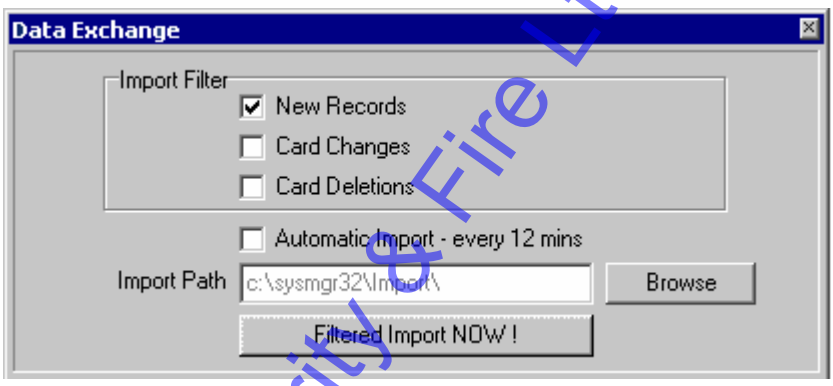
Setting up the Cardholders program to import cardholder records from another system

The other system must provide a file called **bprif.exp** in an **import** directory. This file contains details of cardholder records which you can import into the access control system cardholder database.

1. Open the **Configure** menu and choose the **Data Exchange** command.

2. Make sure the **Import Path** points to the **import** directory, wherever it may be. If you need to change the path, use the **Browse** button.

3. Using the three **Import Filter** check boxes, choose the cardholder records you want to import.



(Note: whenever you change filter settings, you must make the same changes on every copy of the Cardholders program on your local area network.)

New Records are cardholder records which have been added to the other system's database.

If you choose this option, the Cardholders program will add the new cardholder records detailed in the **bprif.exp** file to the access control system database. If there is an existing cardholder record with the same card number, it will be overwritten.

If any fields are missing from the **bprif.exp** file, they will be set to default values - you can enter the correct values in these fields afterwards by editing the cardholder record.

Card Changes are cardholder records in the other system's database which have been changed.

If you choose this option, the Cardholders program will make changes to the cardholder records as detailed in the **bprif.exp** file. If there is no existing cardholder record with the same card number, it will create a new one.

Card Deletions are cardholder records which have been deleted from the other system's database.

If you choose this option, the Cardholders program sets the **Card Status** field of all the deleted cardholder records detailed in the **bprif.exp** file to **Disabled**. It does <u>not</u> delete the cardholder records from the database.

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4. Click on the **Filtered Import NOW !** button.

The access control system cardholder database is updated according to the data in the **bprif.exp** file and the filters which you chose at step 3.

The changes are downloaded to all relevant Controllers in all local hardware systems according to their Access Level ("deleted" cards are disabled, not deleted). Changes to cardholder records at Remote Site Hardware Systems are stored in the host computer until connections are made at the configured times.

Automatic Import

If you enable the **Automatic Import - every 12 mins** check box, the Cardholders program will import cardholder record data from the **bprif.exp** file automatically every 12 minutes, according to the filters you set up in the **Import Filter** check boxes. You need to delete the **bprif.exp** file after each import, otherwise you will import the same data each time and will overwrite any subsequent changes. You can change the 12 minutes to a different value in the appropriate **.lan** file.

Using the global field replace utility

This utility enables you to change the contents of certain fields throughout the whole of your cardholders database in one go without having to edit each record individually.

For example, you might want to change the name of the "Engineering" department to the "Design" department, in which case this utility will find all the cardholder records whose **Department** field is set to "Engineering" and change the contents of the **Department** field to "Design".

Or you might change the layout of your photo-ID badges and therefore want to allocate the new badge design to all your cardholders.

The global field replace utility enables you to replace one or more of the following fields throughout the whole cardholders database in one operation:

Site Code Reference
Access Level
Card Status
Department
Time Plan
Badge Design

Important note: we recommend that you make a backup of your user32 table which is in your SQL database before you start – please see your IT department, system administrator or installer for help with this. Any changes you make using the global field replace utility are irreversible - there is no "undo" function. Accordingly the utility has its own permission in the list of cardholders permissions in LaunchPad.

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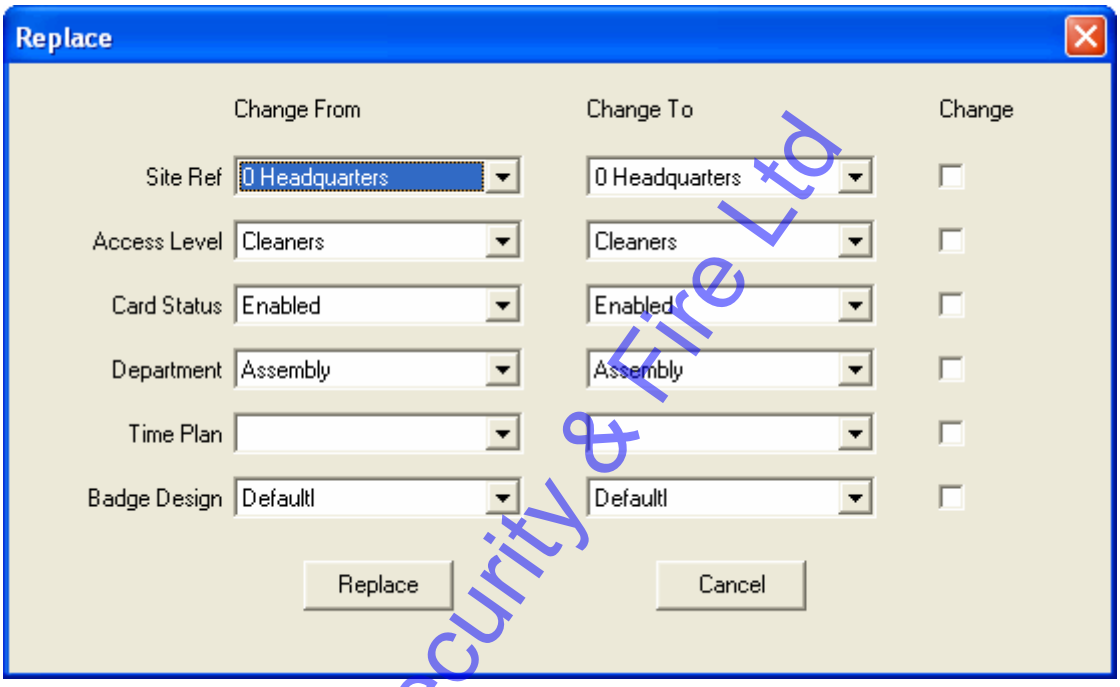
Example 1

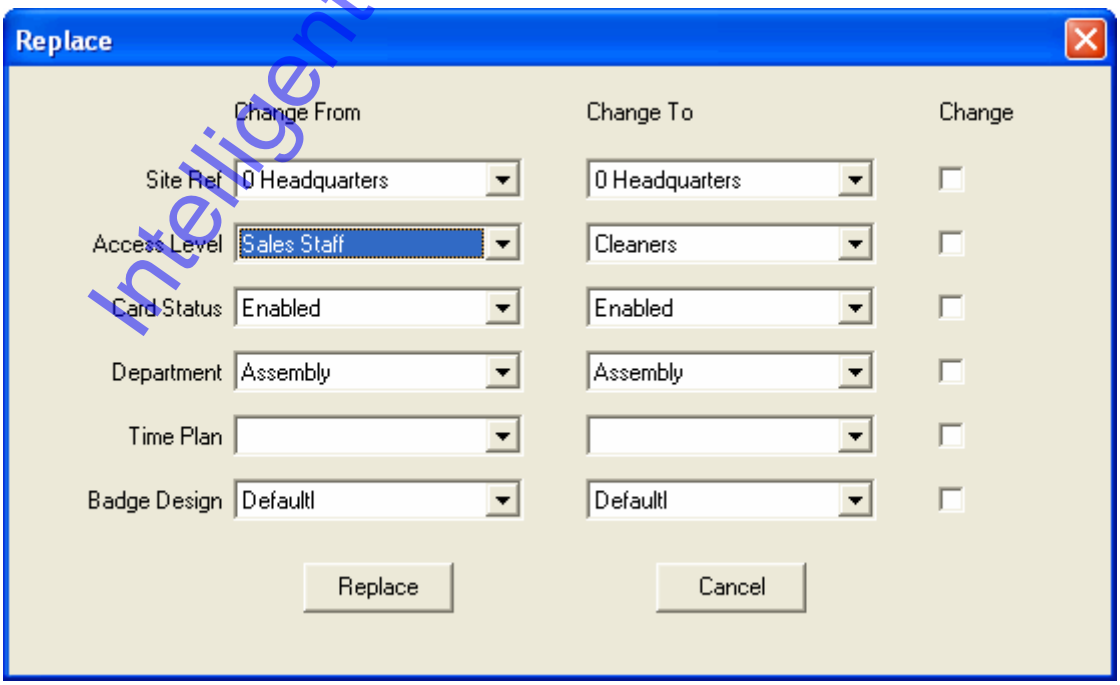
Place all cardholders whose access level is “Sales staff” in an existing access level called “Office staff”.

1. Click on the button which is at the top of the cardholders screen, immediately to the right of the navigation buttons:

   The “Global field replace” form is displayed:



2. In the column headed **Change From**, click on the **Access Level** field and choose “Sales staff” from the list.



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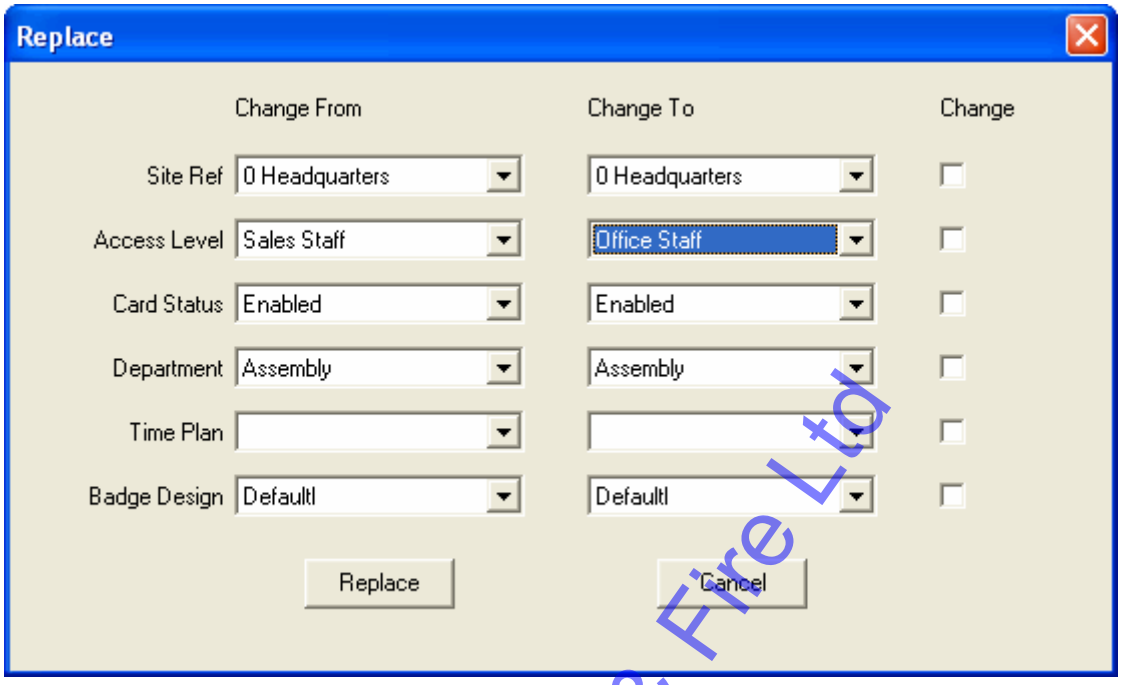
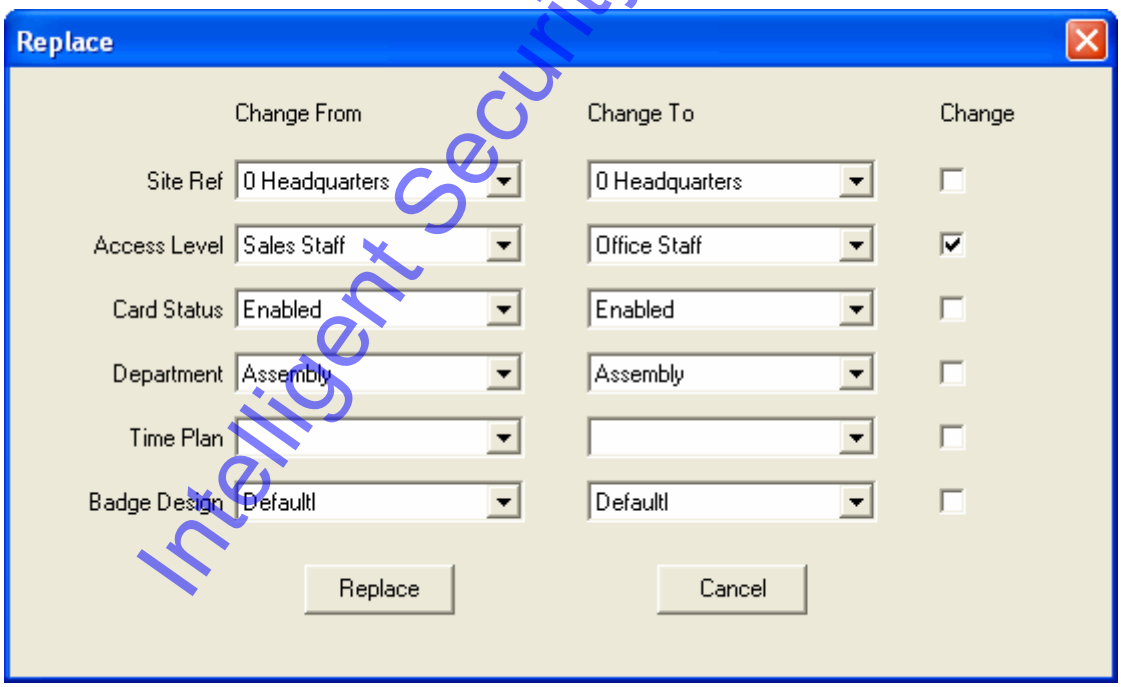
3. In the column headed **Change To**, click on the **Access Level** field and choose “Office staff” from the list.



4. In the column headed **Change**, click on the check box for the **Access Level** field to select it.



Note that you can select as many check boxes as you want in the **Change** column - the utility enables you to replace any number of different fields in one operation.

5. Make sure that the changes you have selected are correct, then click on the **Replace** button. To make the changes, click on the **Yes** button. (Remember that there is no going back - the changes you make are irreversible. If you make a mistake, you will have to revert to your backup of your **user32** table.)

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A message is displayed when the fields have been updated - click on the **Yes** button.

Example 2

Place all cardholders whose access level is “Sales staff” in a new access level called “Export sales”.

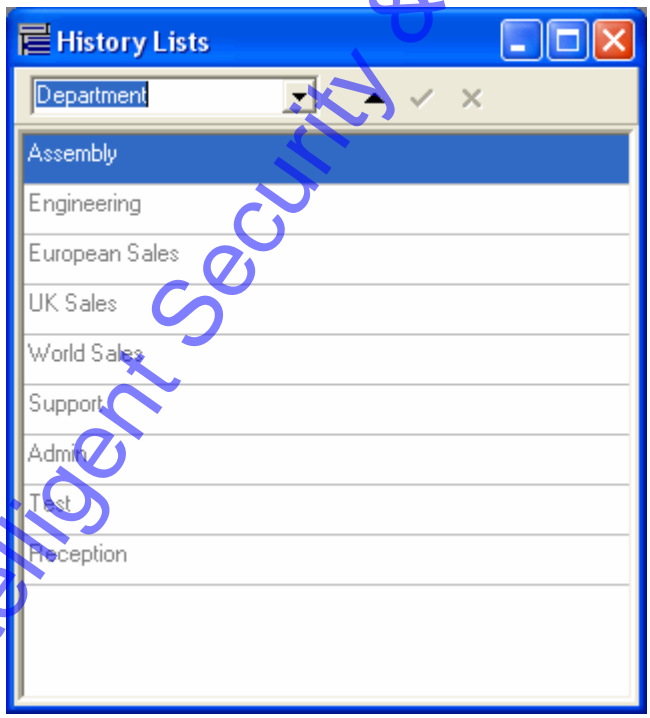
- Define a new access level called “Export sales” using the System Administration program, then follow the same procedure as in example 1 above, choosing “Sales staff” in the **Change From** column and “Export sales” in the **Change To** column.

Example 3

Place all cardholders who are in the “Engineering” department in a new department called “Design”.

1. First you need to create a new department name called “Design”.

   Open the **Configure** menu and choose the **History Lists** command.



2. Click on the ▲ button, then click on the ✚ button to add a blank line to the bottom of the list of department names.

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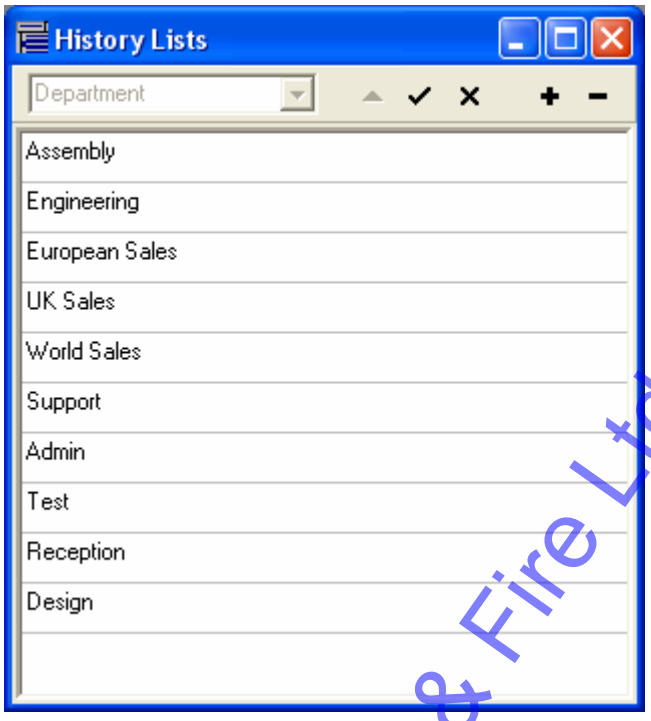
3. Click on the blank line so that the cursor is flashing in it and type Design.

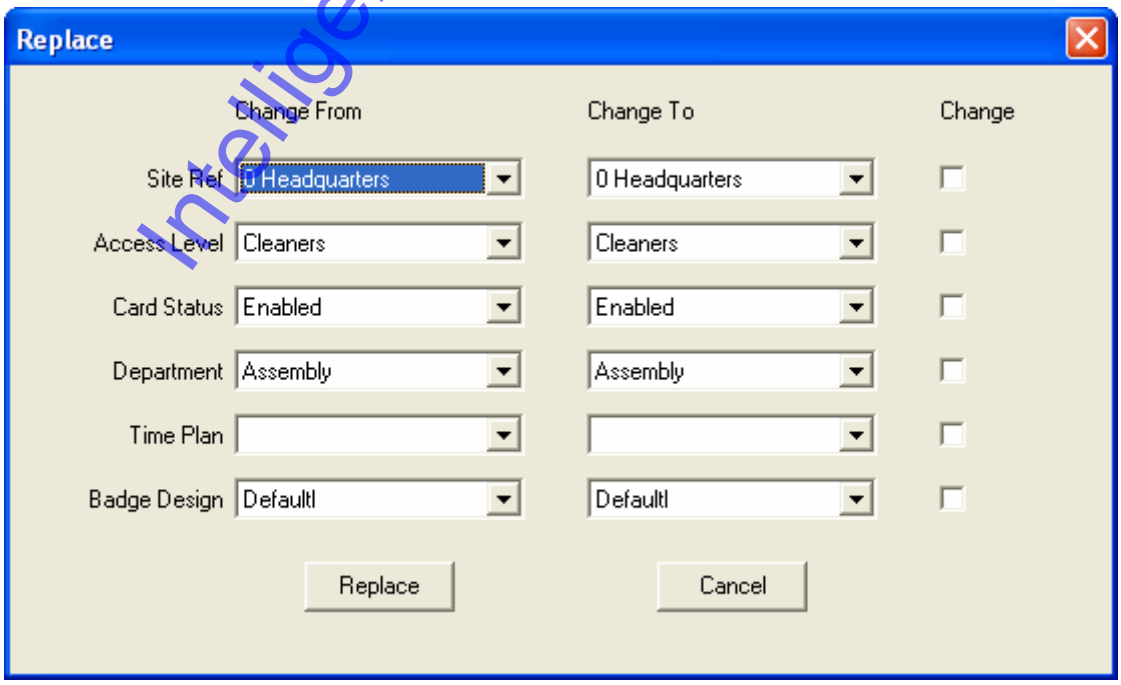


If you make a mistake, click on the ✕ button to cancel all the changes you have made and try again.

4. Click on the ✓ button to save the new department name, then click on the ✕ button to close the History Lists form.

5. Click on the button which is at the top of the cardholders screen, immediately to the right of the navigation buttons:

The "Global field replace" form is displayed:



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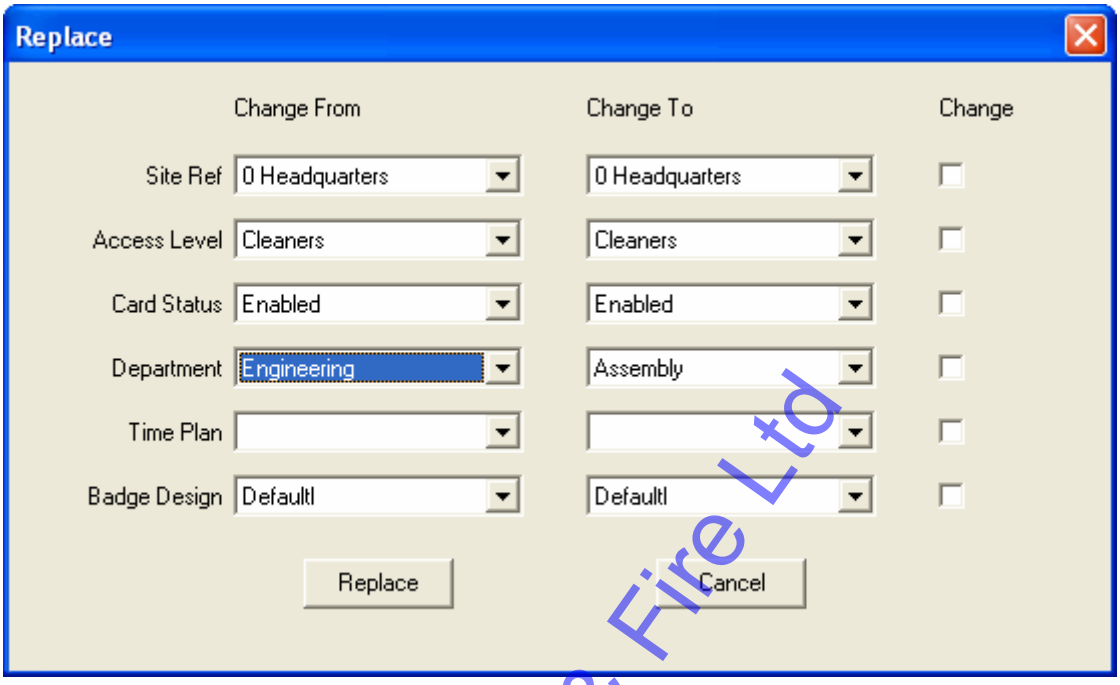
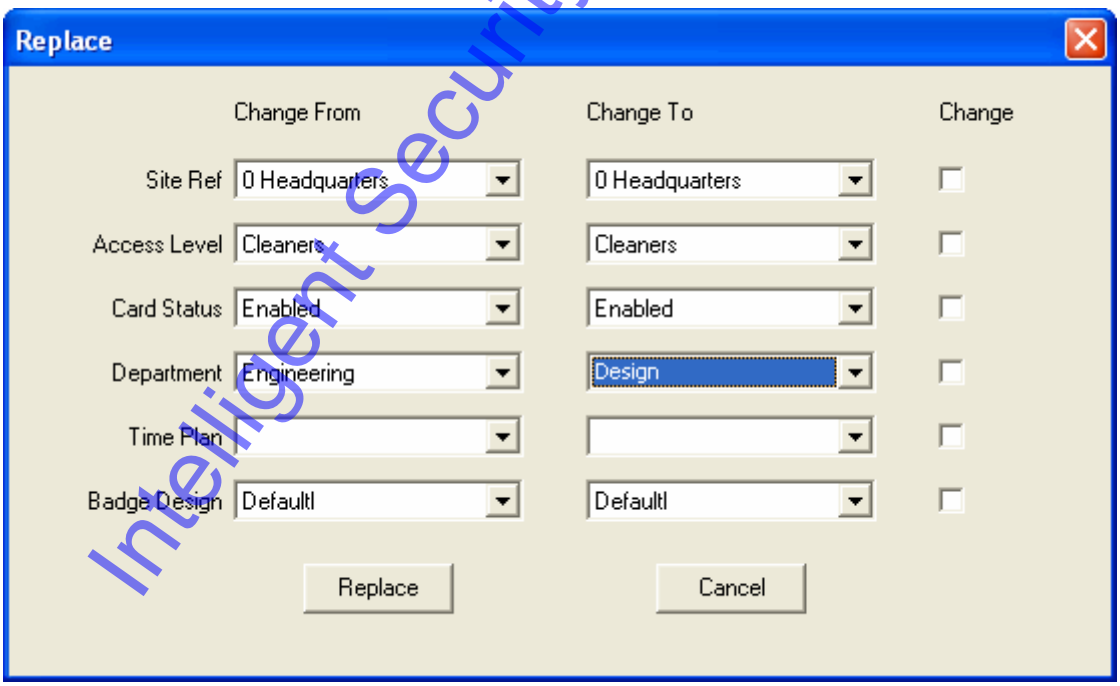
6. In the column headed **Change From**, click on the **Department** field and choose “Engineering” from the list.



7. In the column headed **Change To**, click on the **Department** field and choose “Design” from the list.



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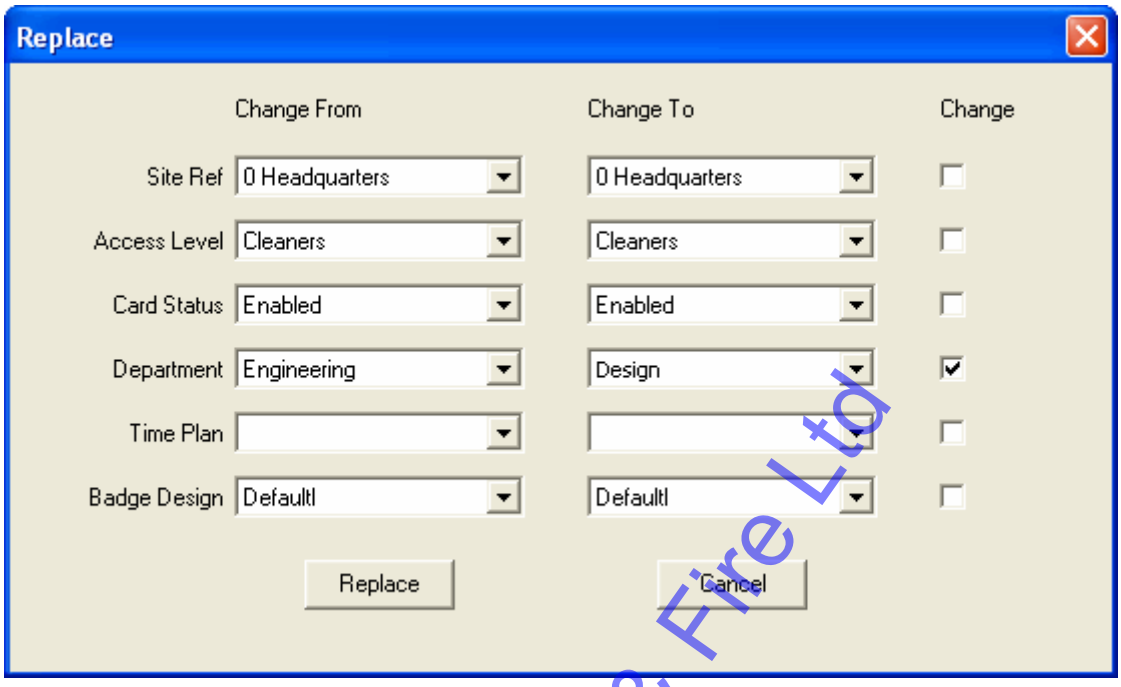
8. In the column headed **Change**, click on the check box for the **Department** field to select it.



9. Make sure that the changes you have selected are correct, then click on the **Replace** button. To make the changes, click on the **Yes** button. (Remember that there is no going back - the changes you make are irreversible. If you make a mistake, you will have to revert to your backup of your **user32** table.)

   A message is displayed when the fields have been updated - click on the **Yes** button.

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