Personnel

The Personnel screen is used for creating badge holder records. Using this screen, it is possible to associate a badge number with a name, set access rules, and attach special attributes to the badge.

Accessing Personnel Screen

The Personnel screen can be opened in two ways as below:

1. **By clicking the** Personnel **button on the CardAccess main toolbar.**

Fig. 32.1. The 'Personnel' button on CardAccess toolbar.

2. **By clicking the** Access➔Personnel **menu options using the CardAccess menu bar.**
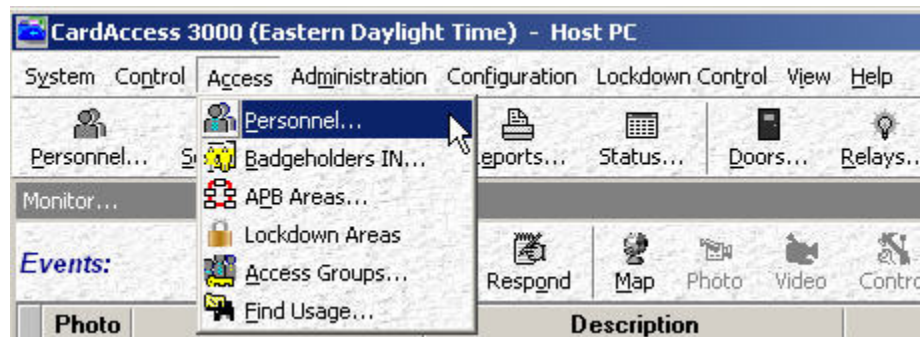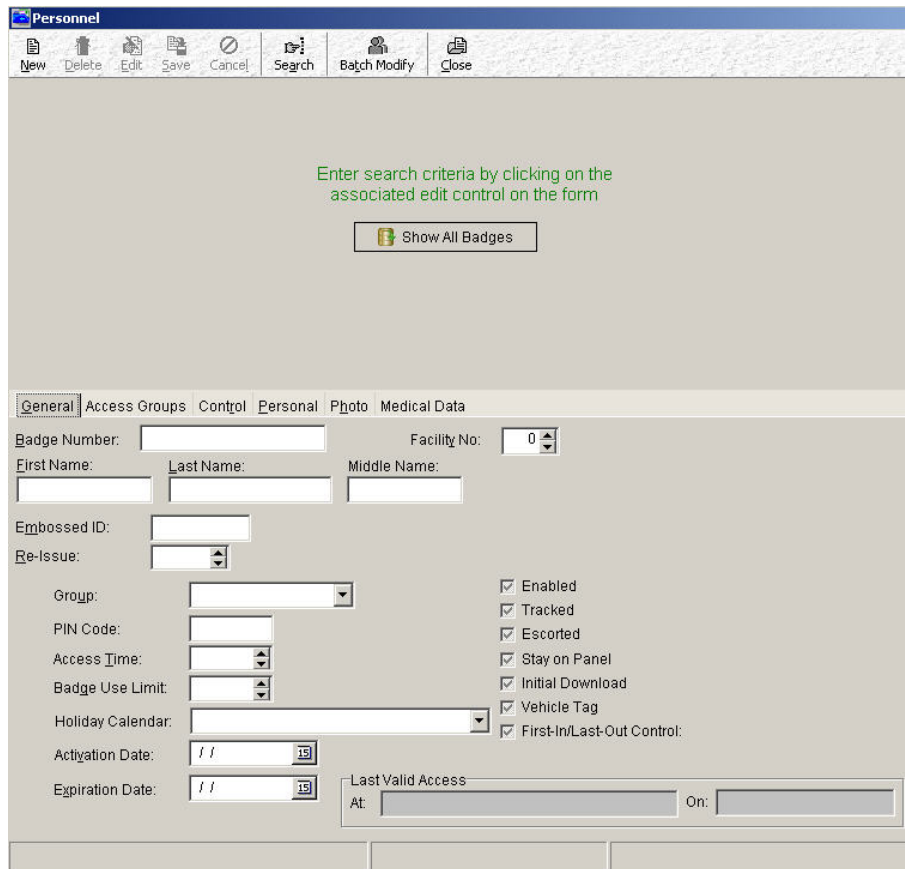

Fig. 32.2. Clicking the 'Personnel' menu option in the Access menu list.

Both the methods will open the Personnel screen in *General* tab as shown below.

Fig. 32.3. Personnel screen in General tab.

The Personnel screen consists of four major sections. They are as follows:

    A. *The Main Toolbar:* **The toolbar seen at the top of the screen (refer figure 32.3) provides buttons for functions such as Adding, Deleting, Editing, Searching of badge records etc.**

    B. *The View Window:* **The view window seen in the top half of the screen is reserved for displaying the Personnel records that are created in the Personnel screen. Records can be displayed in two ways as below.**

a. **By clicking the** Show All Badges **button- Doing this will display** all records **that are created in the Personnel screen.**

OR

b. **By using a** search criterion- **Search criteria offer you the privilege of viewing only records of your interest (for details, refer the section** Searching for Personnel Records **below).**

For a highlighted badge record, the columns of the view window will display the data you enter in the respective controls provided in the bottom half of the screen.

If you wish to view more records in the view window, resize the Personnel screen by dragging the bottom right corner of the screen.

To view the details of a specific record, use the scrollbar to the right of the View window to scroll to the desired record, and then click on the record. The settings of the selected record will then be displayed in the bottom half of the screen.

C. *The Settings Section:* **The settings section seen in the bottom half of Personnel screen has a number of controls (in the different folder tabs) for entering the badge holder information, as well as setting the operating rules for a badge holder. The settings made in the controls affect the operation of the devices that are configured in the other CardAccess screens. Each of the controls will be discussed under their respective folder tabs.**

D. *The Status Bar:* **The status bar seen at the bottom of the screen provides four details as below.**

a. *Filter:* **Against the word 'Filter', you will see the search criterion that is currently in effect, in the Personnel screen. For details, refer the section** Searching for Personnel Records **below.**

b. *Reset Filter:* **Suppose you have used a search criterion to 'filter' out the desired personnel records, and wish to cancel the**

current filter action, you may click the 'Reset Filter' button. Doing this will take the Personnel screen back to its default state (figure 32.3), where no records will be seen.

c. *Last Edit:* **Against the words** *'Last Edit'***, you will see the date and time at which the** <u>currently</u> <u>highlighted</u> **badge record was last changed.**

d. *Total Badges:* **Against the words '***Total Badges'***, you will see the total count of badge records that match the search criterion that is currently in effect. This count will equal the number of badge records you see on the view window of the screen.**
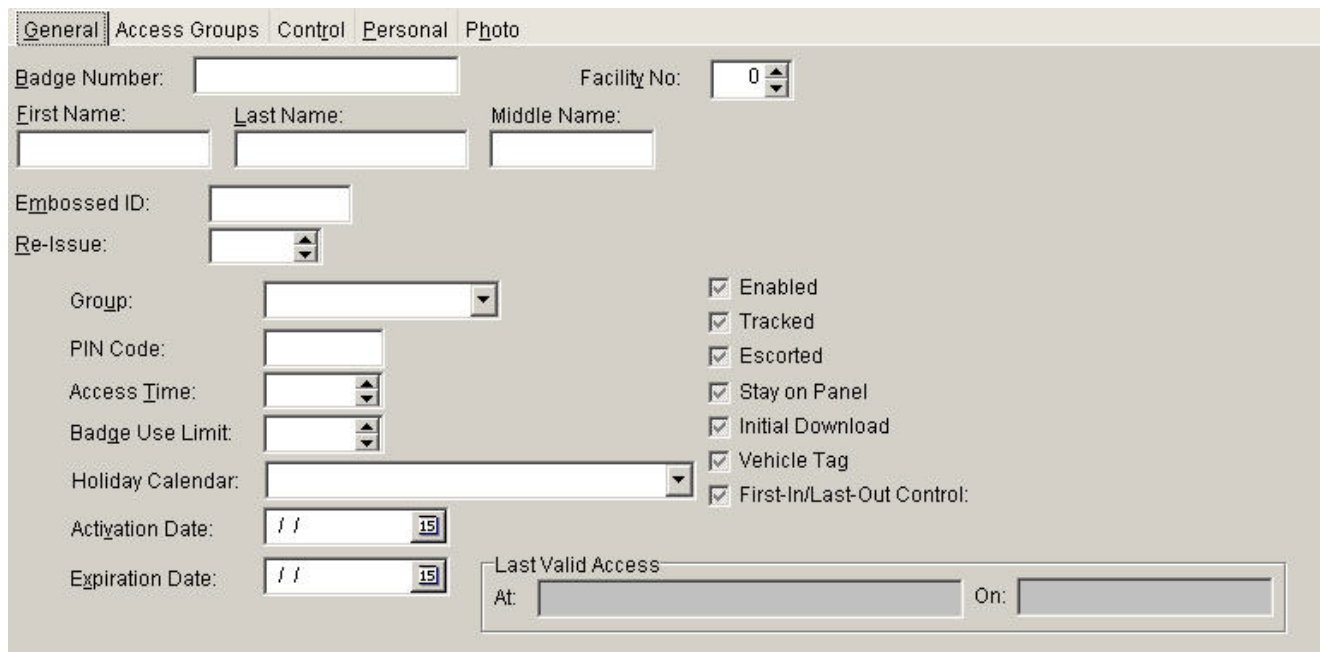
Personnel Records Sort Order

By default, the records in Personnel screen will be sorted according to *Badge No* column. This column allows the personnel records to be sorted according to badge numbers. However, any column can be used for sorting. The sort criterion can be changed by clicking on the column name desired to be used for sorting. Column used for sorting will be highlighted in yellow color. A column can be sorted in ascending/descending orders alternately by clicking the column name. Upward/downward arrows seen in the yellow colored column represent ascending/descending sort orders respectively.

General Tab

The General tab of Personnel screen is where the general information of a cardholder is entered.

The Personnel screen will be displayed in General tab by default.

Fig. 32.4. Personnel screen 'General' tab.

The controls of General tab are explained in the following section.

General Tab Controls

Badge Number

 This field is provided for entering the badge number assigned to a particular badge. The Badge Number entry is a <u>must</u> for creating a basic working badge.

Badge Number: |

Fig. 32.5. The 'Badge Number' field.

The field accepts numeric values only. Leading zeros if entered are ignored. The following message box will be displayed when you type in 0 as the first digit in the field.

CardAccess 3000 - Information

The badge number cannot be 0.

OK

Fig. 32.6. Message box displayed when 0 is entered as the first digit in Badge Number field.

The maximum number of digits that the field accepts depends on the value set for the *Max Badge Digits at Panel* control in the System Settings screen. A maximum of 5, 7, 9, 11, 13, 15, 17 or 19 digits can be set for this control in System Settings.

Facility

The field accepts numbers from 0 – 10. The number can be entered by

- o **Typing the number in the field or**
- o **Using the arrow buttons to the right of the control to choose the number.**

You must set this number to the position of the facility code in the facility codes screen. See the section of the manual called Facility Codes for more information. When facility is set to zero in a badge holder record, facility codes are ignored for that badge holder (see Facility Codes for more on what that means).

Fig. 32.7. The 'Facility' field.

Group

This field is used for selecting a group for database partitioning. The default selection in this field will be *None*.
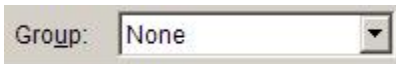

Fig. 32.8. The Group field.

To select a group, follow the steps below:

- Click on Edit button in Personnel screen toolbar.
- Click the down arrow of Group control.
- Select a group from the drop down list by clicking on it.

First Name

This field is provided for entering the first name of the badge holder. The field accepts any combination of letters and numbers. A maximum of 25 characters can be entered in this field.
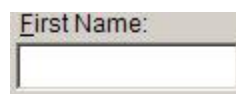

Fig. 32.9. The 'First Name' field.

Last Name

This field is provided for entering the last name of the badge holder. The field accepts any combination of letters and numbers. A maximum of 25 characters can be entered in this field.
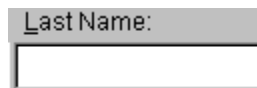
Last Name:

Fig. 32.10. The 'Last Name' field.

Middle Name

This field is provided for entering the middle name of the badge holder. The field accepts any combination of letters and numbers. A maximum of 30 characters can be entered in this field.
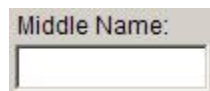
Middle Name:

Fig. 32.11. The 'Middle Name' field.

Embossed ID

Some brands of access cards (like Weigand swipe) do not have card numbers printed on the cards. Instead, they have a serial number 'embossed' (printed) on the card. The manufacturer includes a document with a cross-reference chart that matches serial numbers to card numbers. That serial number is the only identifier on this type of card. The Embossed ID field is a notation field where the user can use this serial number for reference purposes (in case the card is lost). The Embossed ID field is not actively used by the system, it is for notation only.
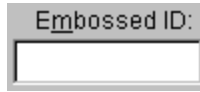
Fig. 32.12. The 'Embossed ID' field.

Re-Issue

Every badge has an associated Badge Number and a Re-Issue number. The Re-Issue number plays an important role to identify the authorized badge holder in case of badge loss. When a badge is lost, the badge holder will be issued a new badge with the same badge number. But, since the old and new badges now have the same badge number, it becomes necessary that the two badges are differentiated from each other. This is when the Re-Issue number comes into picture. To distinguish between the two badges, the Re-Issue number of the lost badge will be incremented by 1, and assigned to the new badge.

When reissue numbers are enabled in a badge format (see '**Badge Formats**' for more information), the CardAccess panels will examine the badge <u>and</u> the re-issue numbers to determine if the card holder will be allowed access. The reissue number must match the number in the Re-issue field of the cardholder's Personnel record. If the numbers don't match a 'Badge Violate Re-Issue' error event message is generated and <u>access</u> <u>is</u> <u>denied</u>.

In this way, numerous badges can be issued with the same badge number, but only the most current issue of the badge will gain valid access at any door.

The Re-Issue number can be set by

- Typing in a value in the range 1-99 in Re-Issue field or ,
- Using the arrow buttons on the right side of the Re-Issue control to choose the required number.
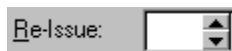

Fig. 32.13. The Re-Issue field.

Pin Code

The pin code is a 1-4 digit (personal) number used in applications where the badge holders are required to present <u>two</u> forms of identification to gain entry at a door. When the system is set up to require 'Card & Code' access at a door, an access card must be presented to a reader <u>and</u> a security code must be entered into a keypad before the door will unlock. Pin codes can be common/unique for all users. Refer the section **Readers** for information on setting up **'Card & Code'** operation at a reader
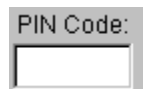
Fig. 32.14. The 'Pin Code' field.

Access Time

Access Time is the number of seconds that a door is held unlocked (that is, open state) after a successful badge read. The Access Time control in the Personnel record can be set to 'override' door open times for certain users, without affecting the door open times for the general population. Door open times are set in the **Readers screen**. Access Time values set in a badge holder's record preempt settings in the Readers screen, for every door that the Badge Holder has access to.
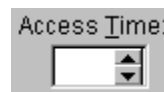
Fig. 32.15. The 'Access Time' field.

The Access Time can be set by

- Typing the desired value in Access Time field or
- Choosing a desired value using the arrow buttons to the right of Access Time control.

Badge Use Limit

The 'Badge Use Limit' control is used to set the maximum number of times a badge can be used, before it is automatically disabled by the system. Once a badge is disabled, it cannot be used again (system wide) until the badge holder record is manually re-enabled by the system administrator.

The Badge Use Limit can be set by

- Typing a number from 1-999 in the Badge Use Limit field or
- Choosing a desired number using the arrow buttons to the right of Badge Use Limit control.

Fig. 32.16. The 'Badge Use Limit' field.

Activation Date

Activation date is a means of automatically enabling a badge based on date. When a badge record is created with Activation date set to some date in the future, the system will automatically enable the badge on the indicated date.

Once enabled, the system will automatically download the badge record to every panel that has doors, that the cardholder is allowed access. Activation happens at 00:00:00 o'clock (midnight + n seconds, at the start of the day) of the date indicated in Activation Date field.

The Activation Date can be set in the following two ways:

- Typing a date of choice in the Activation Date field. The date entered must be in MM/DD/YYYY or MM/DD/YY date format.
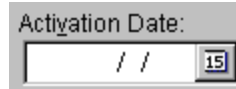
Fig. 32.17. The 'Activation Date' field.

- **By using the** calendar **to choose a desired date. This can be done by following the steps below:**

  o **Click on the calendar button (marked as 15) to the right of Activation Date field. Upon clicking, a calendar window of the current month and year will be opened, with the current date in highlight.**

Fig. 32.18. Calendar window displayed by clicking on calendar button.

Note: **Double left/right arrows and single left/right arrows seen at the top of the screen can be used to scroll backward/forward through the dates/months of a year, for desired date selection.**

  o **Click on a desired date in the calendar.**

Expiration Date

Expiration date is a means of automatically disabling a badge based on date. Disabled badges are <u>not</u> deleted from the database; they are 'deactivated' and can be reactivated at any time later.

Note: **The date entry must be in MM/DD/YYYY or MM/DD/YY date format.**

Once a badge record has been deactivated, the system will automatically remove that badge record from every panel where it is stored. Deactivation happens at 24:00:00 o'clock (midnight, at the end of the day) of the date indicated in Expiration Date field.

The Expiration Date can be set in the following two ways:

- **Typing a date of choice in the Expiration Date field. The date entered must be in MM/DD/YYYY or MM/DD/YY date format.**
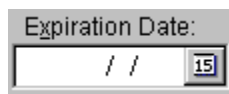

Fig. 32.19. The 'Expiration Date' field.

- **By using the** calendar **to choose a desired date. This can be done by following the steps below:**

  - **Click on the calendar button (marked as 15) to the right of Expiration Date field. Upon clicking, a calendar window of the current month and year will be opened with the current date in highlight.**

Fig. 32.20. Calendar window displayed by clicking on calendar button.

Note: **Double left/right arrows and single left/right arrows at the top of the screen can be used to scroll backward/forward through the dates/months of a year, to select a desired date.**

       o   **Click on a desired date in the calendar.**

Note: **When a badge is disabled by means of an Expiration Date, the system will remove the check mark from *Enabled* check box, in the concerned Personnel record.**

Enabled

   This control enables or disables a badge. If checked, the badge is enabled. When the badge is enabled, the cardholder's badge record is automatically sent to all panels, where the cardholder will be allowed access. When the badge is disabled, the record is automatically removed from every panel, where the cardholder has access. To enable or disable the badge, click on 'Enabled' check box.
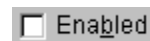

Fig. 32.21. The 'Enabled' check box.

Tracked

The tracked function is usually used to track a badge holder's movements throughout a building. When the Tracked check box is enabled (checked) for a particular badge record, a different priority level is assigned to the badge.

Priority levels for badge card reads are set in the Readers screen (for more information, refer the section Readers). In figure 32.23, observe that the default priority for a Tracked Badge is higher than the default priority for a valid badge. This means that, even though a Tracked badge read is a 'valid' badge read, it will be treated differently.

There are two specific differences in the handling of a tracked badge versus a standard valid badge. They are:

- **A Tracked badge read has a special event message called "Badge Valid – Tracked" and**
- **It is usually displayed in the Alerts portion (not Events) of CardAccess screen so that, they can be noticed by security personnel easily.**

Click the 'Tracked' checkbox to enable or disable the Tracked function for a given badge holder.
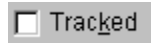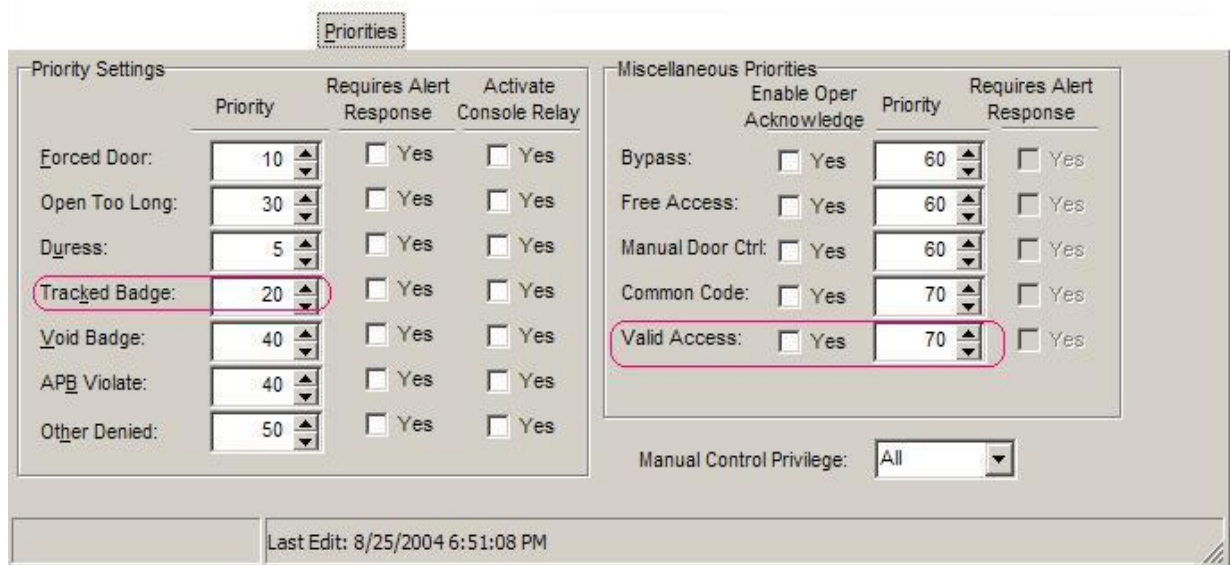
☐ Tracked

Fig. 32.22. The 'Tracked' check box.

Fig. 32.23. Readers screen Priorities tab showing default priority values for 'Tracked Badge' and 'Valid Access' badge reads..

Escorted

When Escorted box is checked for a badge, two badge reads are required at the reader for the Escorted cardholder to gain access. The second badge read must be from a non-Escorted type card. However, an Escorted card will require a second badge read only at those readers that are set up as Escort readers (for more information on setting up an Escort reader, refer the section Readers). At a non-escort reader, a badge set to Escorted is treated in the same way as any other non-Escorted badge. To enable escorted, click the Escorted check box.
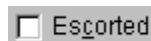
☐ Escorted

Fig. 32.24. The 'Escorted' check box.

Stay on Panel

This control is active only when an access panel is in Interactive Mode (to learn more about interactive mode, refer the section Panels). When Interactive Mode is enabled at a panel, all badge records that have the 'Stay on Panel' function enabled, will be permanently stored in the panel memory, as much as space allows. Those badge records that have not been used recently, and do not have the 'Stay on Panel' function enabled, can be deleted from panel memory, if memory space becomes an issue. When Interactive Mode is turned on at a panel, set the 'Stay on Panel' function active for all badges that are expected regularly at readers on that panel, provided the memory space allows.
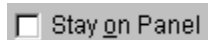
☐ Stay on Panel

Fig. 32.25. The 'Stay on Panel' check box.

Initial Download

 This control is active only when an access panel is in the Interactive Mode (to learn more about interactive mode refer the section Panels). When Interactive Mode is enabled at the panel, all badge records that have the Initial Download function enabled, will be downloaded to the panel memory, on every full panel or badge download. When Initial Download is not enabled, each badge will only be downloaded to the panel as they are presented to readers on that panel.
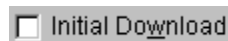
☐ Initial Download

Fig. 32.26. The 'Initial Download' check box.

Vehicle Tag

The 'Vehicle Tag' check box will be visible only when Vehicle Tracking is enabled in *System Settings* screen. This box when checked changes the type of badge holder record from cardholder to Vehicle Tag. Technically, this means

that, the badge belongs to an asset and not a person. Vehicle tags are most commonly created to track company automobiles. Setting up the vehicle tagging function is explained in more detail in the **Readers** section. Click the check box to enable vehicle tagging.
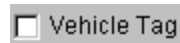
Fig. 32.27. The 'Vehicle Tag' check box.

Last Valid Access

The 'Last Valid Access' area automatically displays the location and date of the latest badge read, for the currently highlighted badge record.
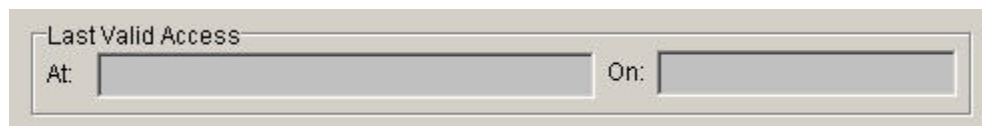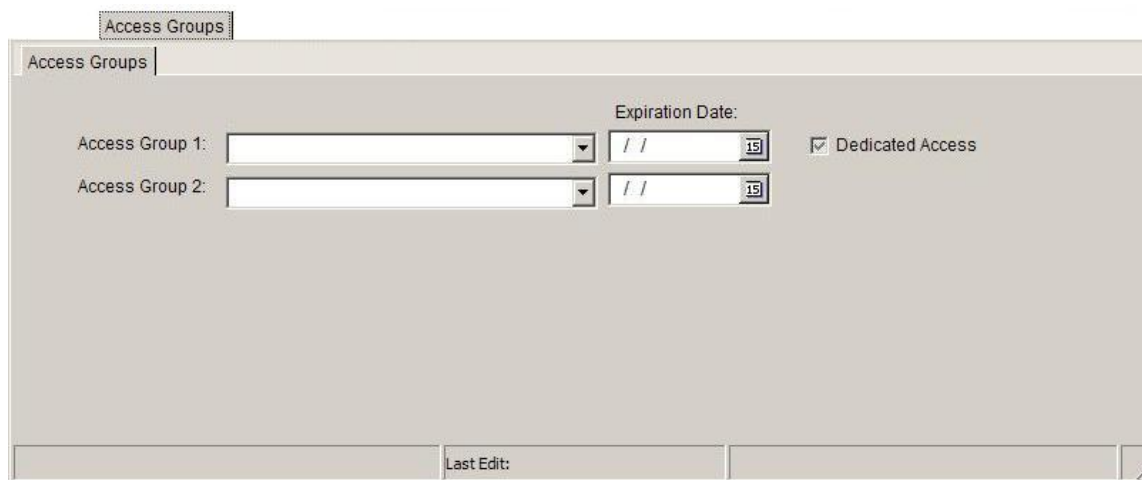

Fig. 32.28. The 'Last Valid Access' area.

Access Groups Tab

The Access Groups tab allows you to assign Access Group(s) to the selected badge holder. Access groups are the one that determine which doors of the building a badge holder can access, and at what times of the day.

By default, the Access Groups tab will have a sub-tab with the <u>same</u> <u>name</u>- *Access Groups*. You will see the second sub tab <u>only</u> <u>when</u> the *Dedicated Access* feature is enabled for the selected badge holder. Dedicated Access is explained separately under the heading **Dedicated Access**.

**The** Access Groups sub-tab **will show** <u>only</u> **two standard access group controls by default.**

Fig. 32.29. The default 'Access Groups' tab in Personnel screen.

But, it is possible to have a maximum of six access groups (inclusive of a dedicated access group, if you choose to create) for every badge holder in the CardAccess.

In case you wish make provision for more access groups than the default, you need to make a setting in the Access Groups per Badge **control of** System Settings screen.
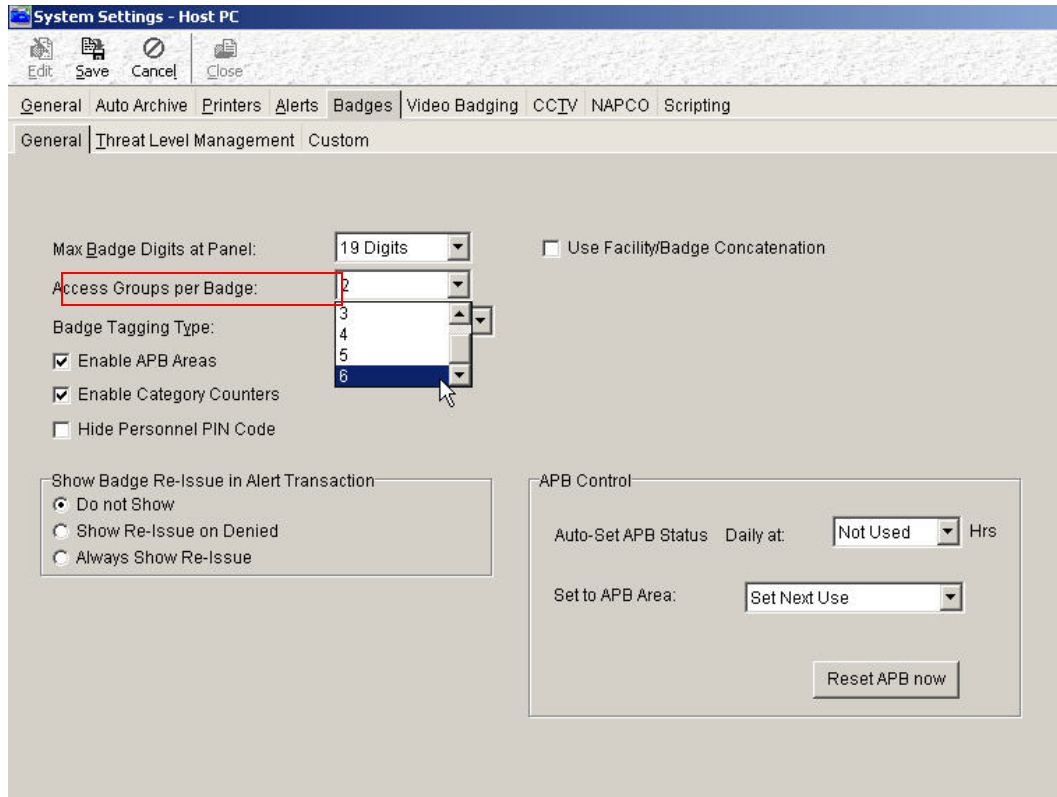
Fig. 32.30. The 'Access Groups per Badge' control on 'System Settings' screen 'Badges' tab.

Please refer the section **System Settings** to learn the steps to be followed for providing more Access Groups to CardAccess badge holders.

In accordance with the number you choose in the Access Groups per Badge control, the number of Access Group controls on <u>Personnel</u> screen 'Access Groups' tab <u>will</u> <u>also</u> <u>change</u>.

Note: In case you have kept the Personnel screen open, you need to close the screen and reopen it for the change to take effect.

In the figure below, you see six access group controls in Personnel screen as we have chosen the number six (maximum) in the System Settings 'Access Groups per Badge' control.
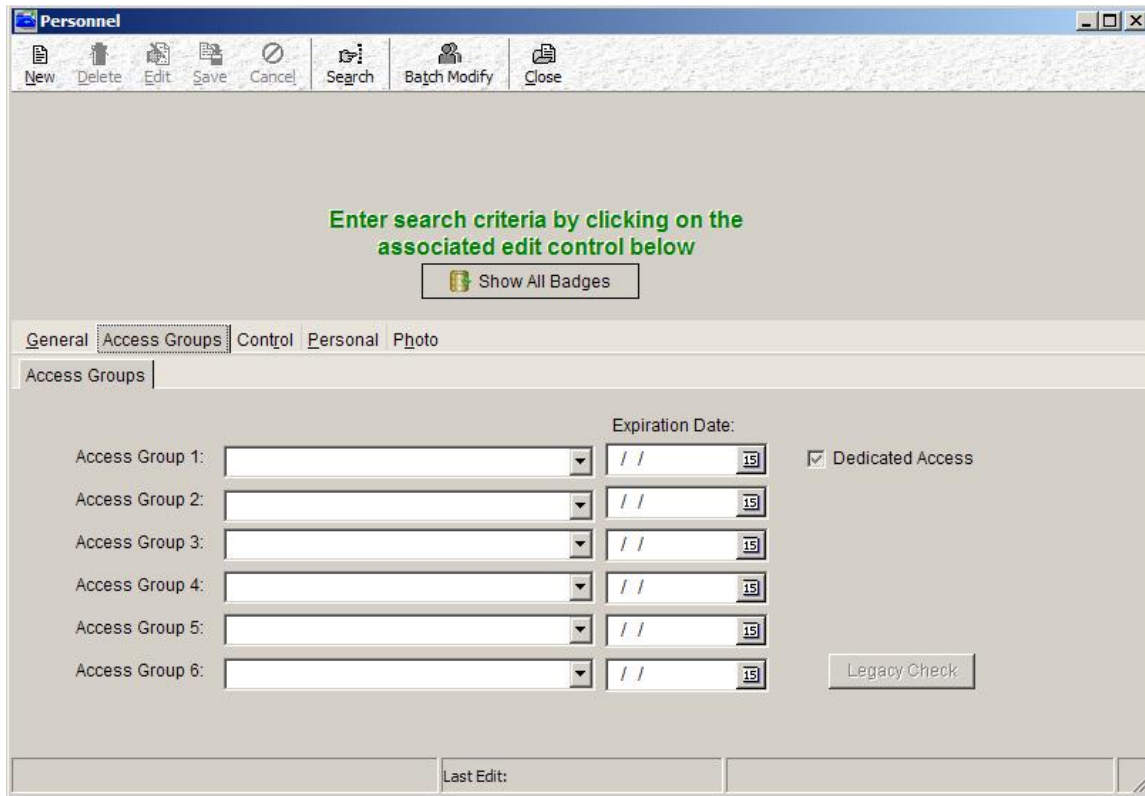
Fig. 32.32. Change in number of access group controls on Personnel screen, depending on the setting made in System Settings screen (figure 32.30).

We shall now move on to create a basic working badge.

Creating a Basic Working Badge

A badge will be functional only when the concerned badge record has a Badge Number, a Name and <u>at least</u> one access group. These details must be specified in their respective fields, in the Personnel screen. The other Personnel screen controls will be assigned default values when you click the 'New' button to create the badge record.

Below, we look at the steps involved in creating a basic working badge.

Note: Before entering the data in the Personnel screen, you must have the badge whose record is going to be created in the screen.

- **Open Personnel screen by clicking on** Personnel **button or** Access→Personnel **menu options in the CardAccess main screen. The screen will open in the** *General* **tab by default.**

- **Click the** New **button on Personnel screen tool bar.**

- **In** Badge Number **field, enter the badge number of the given badge. (see figure 32.33 below).**

Note: **The maximum number of digits that the Badge Numbers can have is fixed in the** *System Settings* **screen. In System Settings screen, the badge numbers are allowed a maximum of 5, 7, 9, 11, 13, 15, 17 or 19 digits.**

- **Specify the name of the badge holder using the** First Name, Last Name **and the** Middle Name **fields. A maximum of 25 characters are allowed in each of these fields.**

Fig. 32.33. Inputs needed in General tab to create a basic working badge.

- **Click on** Access Groups **tab.**

- **Click the down arrows to the right of the desired Access group controls and select the access groups of choice in the lists. Make sure to select a different access group for each control as the system does not allow duplicate access group selections.**

Fig. 32.34. Choosing Access Groups on the 'Access Groups' tab to create a basic working badge.
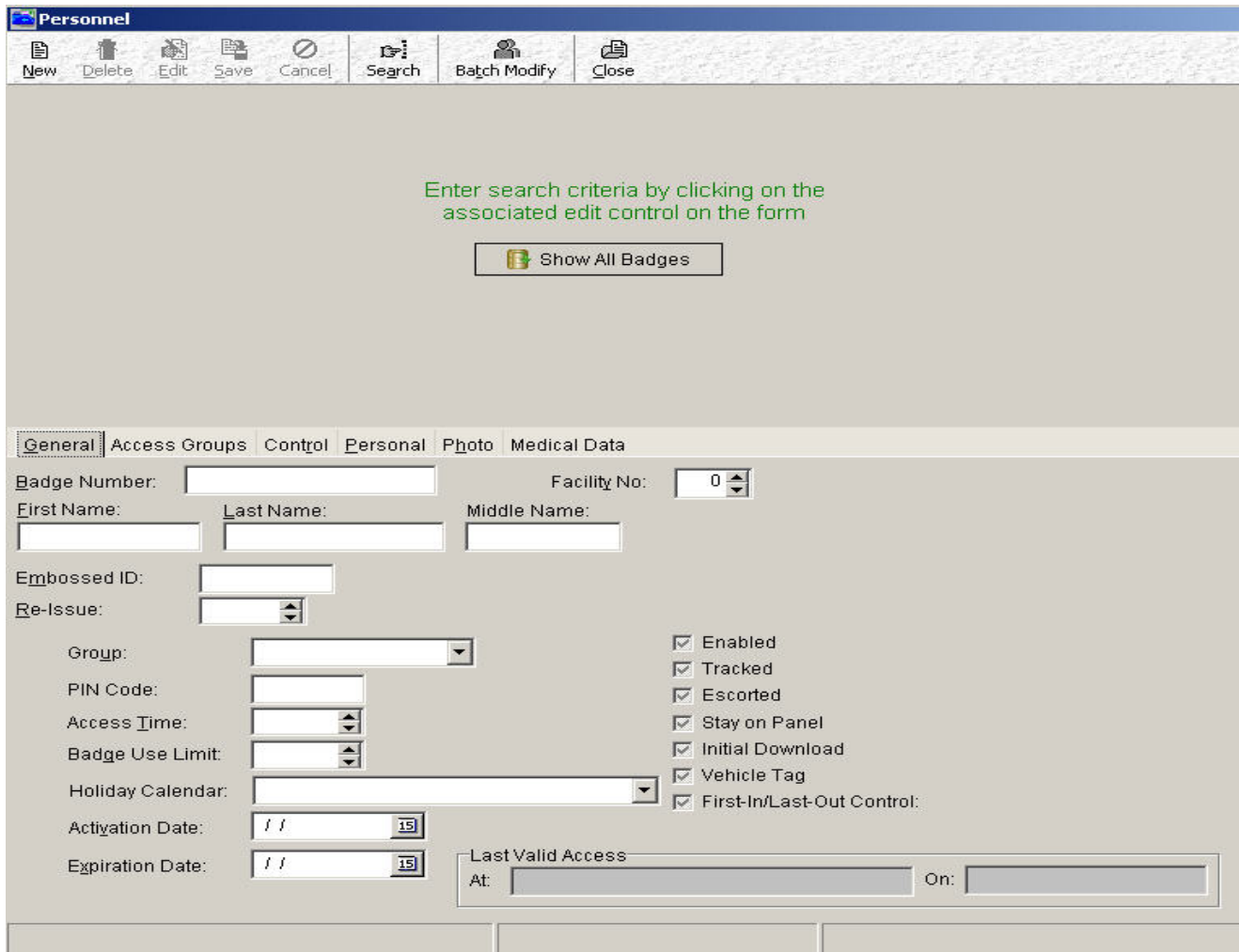*Note:*

- The access group controls 1-n (where n can be any number from 1-6 as fixed in the 'System Settings' screen Access Groups per Badge control. See figure 32.30) can be chosen in any order for assignment. The system does not care about the order in which the controls are assigned access groups.

- If no Access Groups are seen in the drop down lists, you need to create some in the 'Access Groups' screen. Refer the section **Access Groups** to do this.

- **Click the** Save **button on the toolbar to save these settings.**

Once the badge record is saved, the badge created will be automatically downloaded to the Panels that have the Readers in the assigned Access Groups.

Searching for Personnel Records

When you click on Access→Personnel **menu options (or click the** Personnel **button on the CardAccess main toolbar), the Personnel screen will open in the** *General* **tab, but** will not **show any badge records. This happens whether/not records are present in the screen.**

Fig. 32.35. The default 'Personnel' screen not showing any badge records.

Suppose you have several badge records created in the screen and wish to view some or all of them, you can do so by using one of the methods mentioned below.

Method 1: **By employing the** Show All Badges **button to view** <u>all Personnel records</u>**.**

Clicking the 'Show All Badges' button will display all records that exist in the Personnel screen.
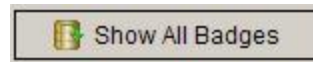
Fig. 32.36. The 'Show All Badges' button to view all personnel records.

You can view the settings of a desired record by clicking on that record in the view window, and observing the settings in the lower half of the screen.

Method 2: **By using a Search Criterion**

Sometimes, you may be interested in viewing only specific Personnel record(s). Here, it becomes needless to employ the 'Show All Badges' that will return all records on the screen. The better way to go in this situation is to search for the records you are interested in, by using <u>search criteria</u>**.**

A large number of edit controls on the Personnel screen serve as search criteria. The Personnel screen has five categories of edit controls. They are: - *Text fields, combo boxes, spin controls, date controls and checkboxes.* **Below, we will discuss how to use each of these categories for searching personnel records.**

Text Fields, Spin Controls, Date Controls

All text fields (except the *PIN Code* **field on 'General' tab and the** *Remarks* **field on 'Personal' tab), spin controls and date controls serve as search criteria. These controls change their color from** white➔light blue **when you click the white space of the controls. This color change is an indication that the selected control can be employed for searching records.**

Along with the light blue color, the selected control will also provide the 'Escape to Cancel' option.

Below, we have shown what happens when you click the white space of the Badge Number text field
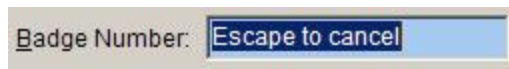
Fig. 32.37. Clicking the Badge Number field has changed the field color to light blue, besides providing the 'Escape to cancel' option.

Note:

- **The Escape to Cancel option is provided in case you change your mind and no longer want to use the selected control for record searching. In this case, you may click the Esc key on your computer keyboard to cancel the current search action. On clicking the Esc key, the selected control will revert back to its default white color.**

- **The Escape to Cancel option for all other controls will serve the <u>same</u> purpose of canceling the search action.**

On the other hand, if you wish to continue searching by the selected control (which is currently seen in light blue color, say by Badge Number field as in our example figure 32.37), you just have to <u>input</u> the <u>correct</u> <u>data</u> into the selected control, and press the Enter key on your keyboard.
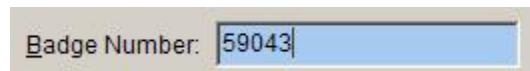
Fig. 32.38. Entering a search criterion.

Note: **Make sure the data you enter in the selected control matches the data actually present in the badge record you are searching for. Suppose you wish to search the Personnel record having badge number 59043, you must enter this number <u>accurately</u> into the field.**

On pressing the Enter key, the system will search for the requested record(s) by using the search criterion provided, and display the matching record(s) on the view window of the screen. You can now click on any desired record in the view window, and view its settings in the lower half of the screen.
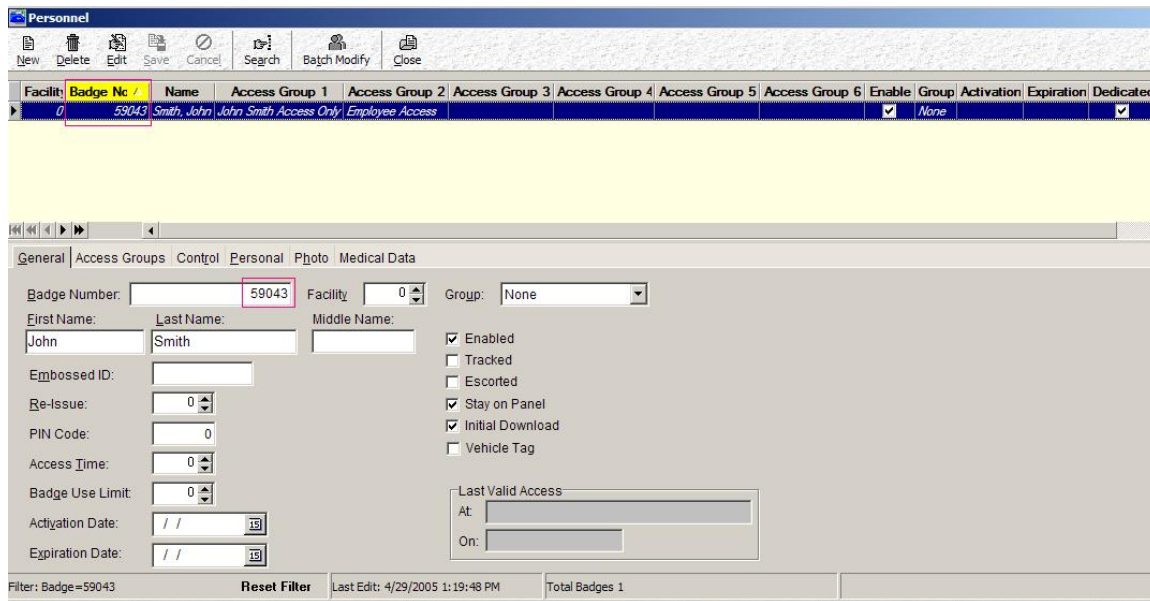
Fig. 32.39. Search result in view window.

The status bar seen at the bottom of the screen will indicate the search criterion currently employed, along with the total number of badges that satisfy that criterion.

Fig. 32.40. Personnel screen status bar indicating the current search criterion used, along with the total number of badge(s) that satisfy the criterion.

If you wish to clear the Personnel screen from the current search results, you may click on Reset Filter button seen on the status bar. This will revert the Personnel screen back to its default condition (see figure 32.35 above), wherein no records will be seen.


Fig. 32.41. Reset Filter button on status bar for refreshing the Personnel screen.

Combo Boxes

All combo boxes (except the *Gender* combo box on 'Personal' tab) serve as search criteria. The combo boxes change their color from white→light blue when you click the white space of the box. This color change is an indication that the selected control can be employed for searching personnel records.

Along with the light blue color, you will also see the list of options that are associated with the selected combo box.

Below we have shown what happens when you click the white space of Access Group 1 control, on the Access Groups tab.
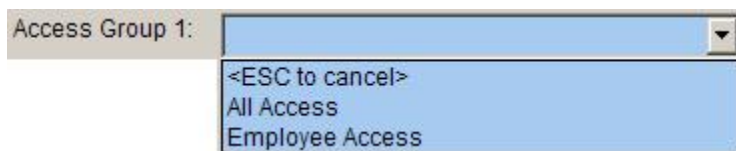
Fig. 32.42. Access Group 1 control turned into blue color, along with the list of access groups, on clicking the white space of Access Group 1 control.

As far as the Access Group 1-6 controls are concerned, the Access Groups list you will see on clicking the controls will only include standard access groups (figure 32.42) that are created in the Access Groups screen. <u>Dedicated</u> Access Group names will be excluded from the list.

The options being displayed, you are now ready to search for Personnel records by clicking a desired option in the list.

Note: Clicking the Esc to cancel option will cancel the search action, returning the selected control back to its default white color.

Below we are selecting *Employee Access* (a standard access group) as the search criterion.
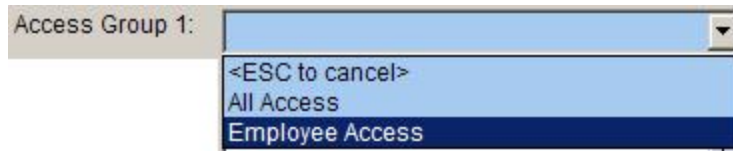
Fig. 32.43. Clicking an option to be used as the search criterion.

On clicking, the system will search for the requested record(s) by using the search criterion specified, and display the matching record(s) on the view window of the screen.

In our example, we have three records that have Employee Access assigned to Access Group 1 control. Hence the system displays these three records on the view window. The settings of the record highlighted in the view window can be seen in the lower half of the screen.
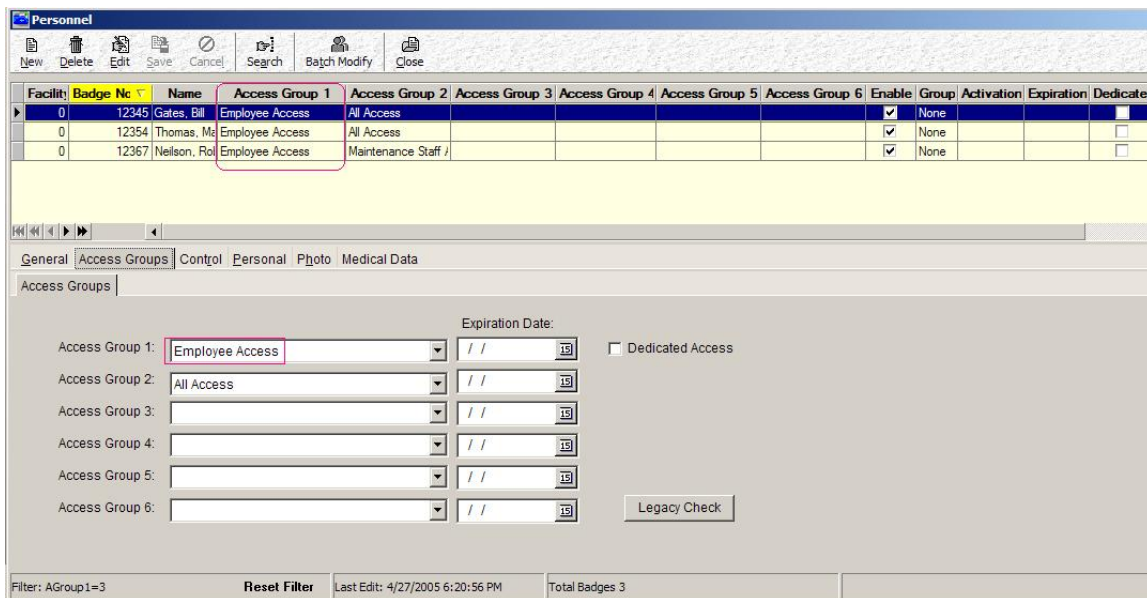

Fig. 32.44. Search results in view window.

The status bar seen at the bottom of the screen will indicate the current search criterion used, along with the total number of badges that satisfy the selected criterion.

Fig. 32.45. Personnel screen status bar indicating the current search criterion used, along with the total number of badges that satisfy the criterion.

If you wish to clear the Personnel screen from the current search results, you may click on Reset Filter button seen on the status bar. This will revert the Personnel screen back to its default condition (see figure 32.35 above), wherein no records will be seen.

Fig. 32.46. Reset Filter button on status bar for refreshing the Personnel screen.
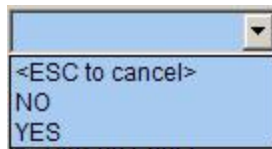
Checkboxes

When the Personnel screen is opened, all the checkboxes will be grayed out by default.
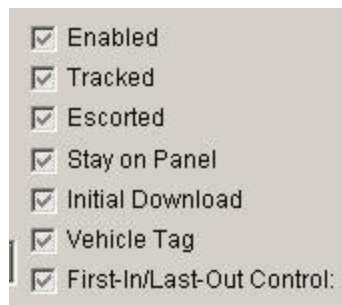
Fig. 32.47. Checkboxes of Personnel screen General tab grayed out by default.

When you click a grayed out checkbox, you will see a drop down list consisting of three options- Esc to cancel, NO and YES options. These options will be seen on a light blue background.

As an example, we clicked the *Enabled* checkbox and obtained the options shown in the figure below.

Fig. 32.48. Options obtained on clicking a grayed out checkbox on Personnel screen.

With the options being displayed, you are now ready to search for Personnel records by using one of the options in the list.

Note: Clicking the Esc to cancel option will cancel the current search action, thereby returning the selected checkbox to its default state (grayed out).

In case you click the **YES** option in the list, the system will search for all Personnel records that were created with the selected checkbox enabled (checked).

In our example, clicking YES for Enabled checkbox, has resulted in the list of all records that were created with the Enabled checkbox selected (checked). See figure below. The settings of the record highlighted in the view window can be seen in the lower half of the screen.

Fig. 32.49. Search results in view window.

In case you click the <u>NO</u> option, the system will search for all Personnel records that were created with the selected <u>checkbox</u> <u>unchecked</u>.

The status bar seen at the bottom of the screen will indicate the current search criterion used, along with the total number of badges that satisfy the selected criterion.

Fig. 32.50. Personnel screen status bar indicating the current search criterion used, along with the total number of badges that satisfy the criterion.

Note: **The YES option for a checkbox is allotted the logical value 1, and the NO option is allotted the value 0. Since we chose the option YES for Enabled checkbox, we see the search criterion as Enabled=1 in the above figure.**

If you wish to clear the Personnel screen from the current search results, you may click on Reset Filter **button seen on the status bar. This will revert the Personnel screen back to its default condition (see figure 32.35 above), where you will see no records.**

Fig. 32.51. Reset Filter button on status bar for refreshing the Personnel screen.

Editing a Personnel Record

Follow the steps below if you wish to edit a Personnel record.

- **Open Personnel screen by clicking on** Personnel **button or**

Access→Personnel **menu options in the CardAccess main screen. By default, the screen will open in** *General* **tab, and will not show any badge records.**

- **Select the Personnel record you wish to edit. This can be done in two ways as below.**

  - **By clicking the** Show All Badges **button, and choosing the desired record in the view window or,**

  - **Searching for the required record by using a search criterion (refer the heading** [Searching for Personnel Records](#) **for details).**

- **Click the** Edit **button on the toolbar.**

- **Make the desired changes to the controls in the different folder tabs, seen in the bottom half of the screen.**

- **Click the** Save **button on the toolbar to save the changes.**

- **Click the** Close **button on the toolbar to close the screen.**

Deleting a Personnel Record

Follow the steps below if you wish to delete a Personnel record.

- **Open Personnel screen by clicking on** Personnel **button or** Access→Personnel **menu options in the CardAccess main screen. By default, the screen will open in** *General* **tab, and will not show any badge records.**

- **Select the Personnel record you wish to delete. This can be done in two ways as below.**

  - **By clicking the** Show All Badges **button, and choosing the desired record in the view window or,**

- o **Searching for the required record by using a search criterion (refer the heading [Searching for Personnel Records](#) for details).**

- **Click the** Delete **button on the toolbar. On clicking, the following message box will be displayed.**

Fig. 32.52. Message box displayed before deleting a badge record.

Note: **The delete action cannot be reversed. Make sure you have chosen the correct record for deleting.**

- **After confirmation, click the** Yes **button in the message box to delete the selected record.**

- **Click the** Close **button on the toolbar to close the screen.**

Access Group 1-6 Expiration Date

The Access Group Expiration Date controls allow you to set a (future) date when the Access Group(s) will be removed from a cardholder (that is, the Access Group control(s) for the cardholder record will revert back to the default selection *'No Access'* **). This event takes place at 24:00:00 o'clock (midnight at the end of the day) of the indicated date.**

Note: **When an access group is taken away from a cardholder because the expiration date has been reached, the change is automatically downloaded to the panels where the cardholder had access.**

Unlike the badge Expiration Date which disables the card, removing an access group does not necessarily mean that the cardholder will no longer have access to a building. For example, if we provide a card holder with Access Groups 1 & 2 say, and we set an expiration date on Access Group 2 only, Access Group 2 will be removed from the card holder on the expiration date, but that card holder will still have access group 1.

The Expiration Date for an Access Group control can be set in the following ways:

- Typing a date of choice in the Expiration Date field. The date entered must be in MM/DD/YYYY or MM/DD/YY date format.

Fig. 32.53. Access Group 1-6 Expiration Date fields.

- By using the calendar to choose a desired date. This can be done by following the steps below:

  o Click on the calendar button (marked as 15) to the right of an Expiration Date field. Upon clicking, a calendar window of the current month and year will open up, with the current date in highlight.
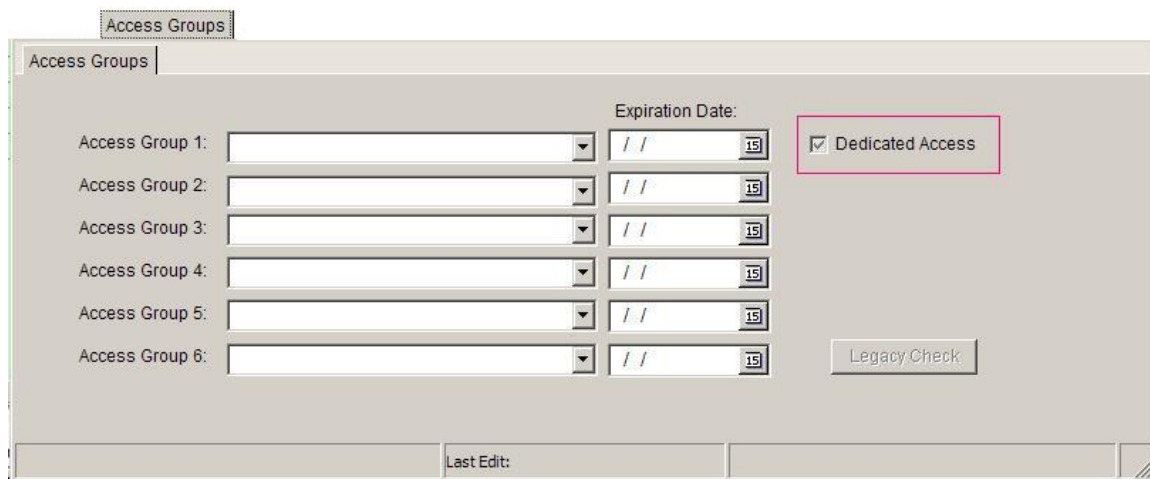

Fig. 32.54. Calendar window displayed by clicking on number button.

Note: **Double left/right arrows and single left/right arrows can be used to scroll backward/forward through the dates/months of a year, to select a desired date.**

      o   **Click on a desired date in the calendar.**

Dedicated Access

The Access Groups tab has a checkbox named Dedicated Access. The purpose of this checkbox is to turn the dedicated access feature On/Off, for a selected badge holder.

Fig. 32.55. The 'Dedicated Access' check box in Personnel screen 'Access Groups' tab.

A 'Dedicated' Access group is a special access group in that, it <u>solely</u> belongs to the selected badge holder only, and cannot be assigned to anybody else. This differs from the standard access groups that can be assigned to as <u>many</u> badge holders as you wish. More information on standard access groups can be sought in the section <u>Access Groups</u>.

Below, we explain how to create a 'dedicated' access group.

Creating a Dedicated Access Group

As an example, let us create a 'dedicated' access group that solely belongs to the president of a company. The following are the steps involved.

1. **Open** Personnel **screen by clicking on** Personnel **button or** Access→ Personnel **menu options in CardAccess main screen. By default, the screen will open in the** General **tab, and will show no badge records in the view window.**


Fig. 32.56. Personnel screen in General tab.

2. **The foremost action to take in Personnel screen is to either search for or, create a new badge holder record (by following steps explained under** **Creating a Basic Working Badge) for which you wish to enable the dedicated access feature.**

In our example, we will consider the badge record we created earlier (with Badge Number *59043*, Name *John Smith* and two standard access groups- *All Access*, *Employee Access*) to be the badge record of the president, for whom we will create a dedicated access group.

So, we will search for this particular record (by entering the badge number, or the name in corresponding General tab field and clicking the Enter key on the keyboard). We also have the option of searching by clicking the down arrow of access group 1 or 2 control, and choosing the correct access group for that control). On searching, the system will display the record sought after, in the view window of the screen.
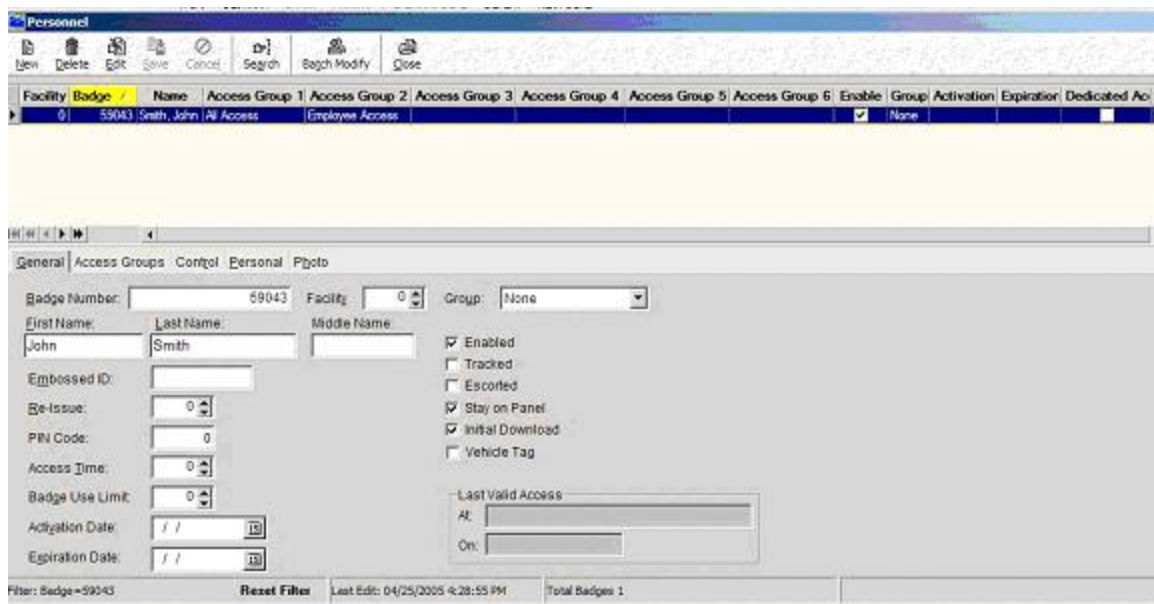
Fig. 32.57. Badge record for dedicated access group highlighted in the view window.

3. **Click on** Access Groups **tab.**

4. **Click the** Edit **button on Personnel screen toolbar.**

5. **Click the** Dedicated Access **checkbox to select it.**

On clicking, you will find yourself in the Dedicated Access sub-tab as shown in the figure below. This sub-tab will contain two columns named as *Panels/Readers* and *Time Schedule.*

The Panels/Readers column will show the names of all Panels that are created in the Panels screen. To the left of each Panel name you will see a node (+ mark). Expanding a Panel node will show the list of all Readers that belong to the selected Panel, and whose records are created in the Readers screen.
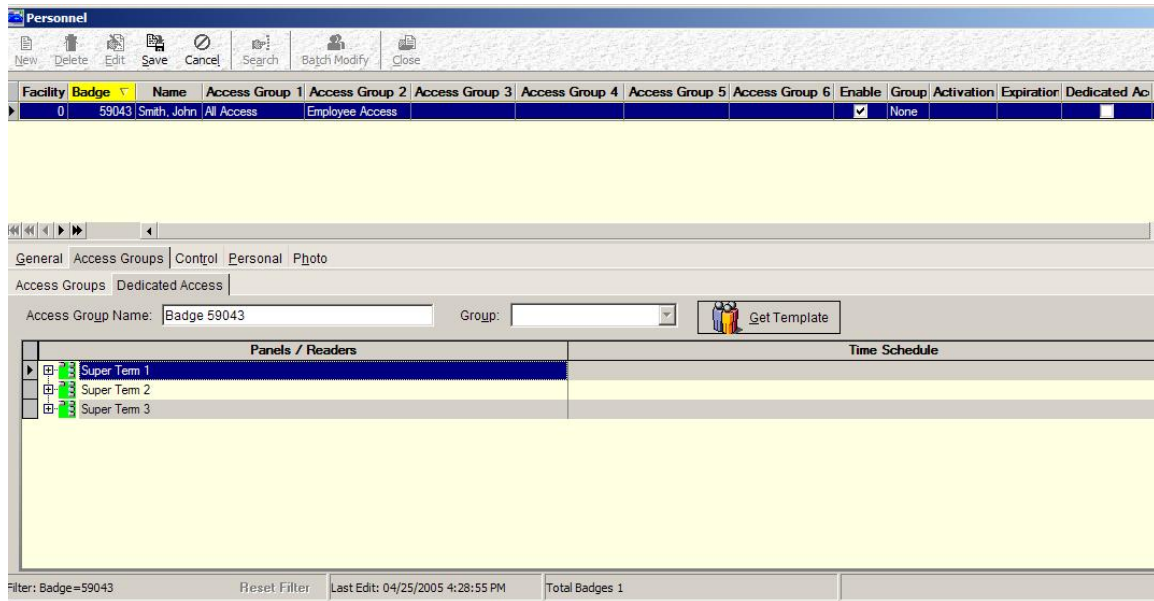
Fig. 32.58. The 'Dedicated Access' sub-tab.

6. Decide on the Reader you wish to 'dedicate' to the selected badge holder, and expand the corresponding Panel node. On expanding the Time Schedule column corresponding to that Reader will show the default selection *Not Used*.

Let us assume that we like to dedicate the Reader named *President's Office* belonging to the *Panel 3* (see figure below) to *John Smith* in our example. Hence we need to expand the node corresponding to Panel 3 as we have done below.
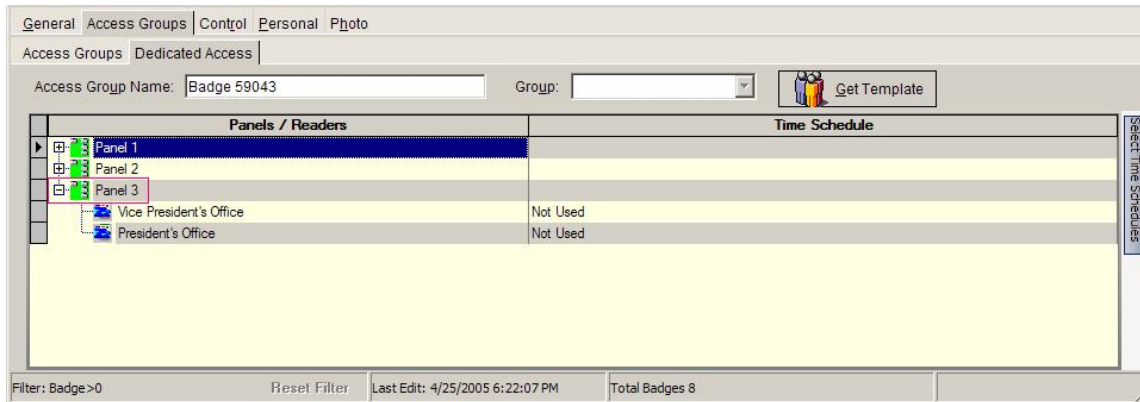
Fig. 32.59. Expanding a Panel node to dedicate a Reader.

7. **Click the** Time Schedule **column of the selected Reader. Doing this will show a** down arrow**. Click the down arrow and select a desired time schedule in the list. The time schedules seen in the list are those that are created in the 'Schedules' screen.**

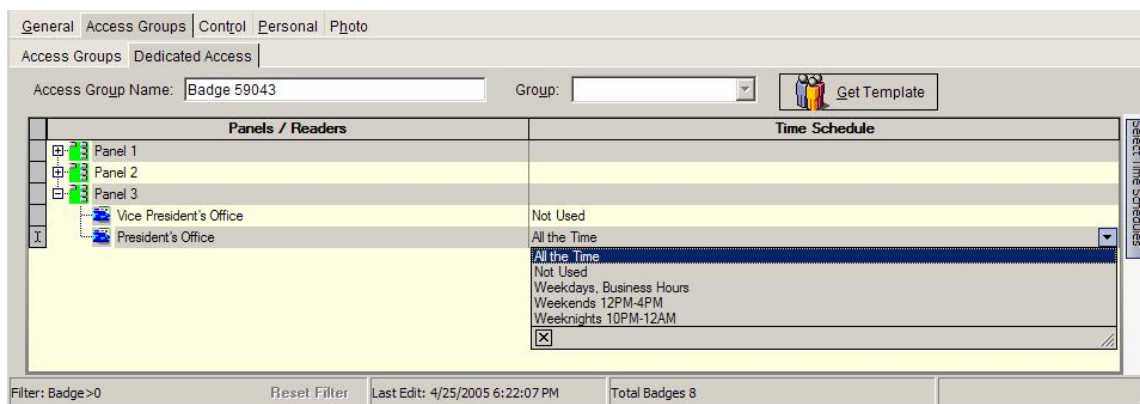**For our example, we will select the Time Schedule** *All the Time* **for** *President's Office*.
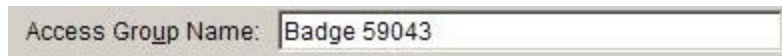

Fig. 32.60. List of Time Schedules for a selected Reader.

Note: **If no schedules are seen in the list, you need to create some in the Schedules screen. Refer the section Schedules to do this.**

8. **Similarly, you can make time schedule selections for other Readers (belonging to the Panel selected in step 6).**

9. In case you wish to include **Readers** belonging to other **Panels** in the dedicated access group, repeat steps **6, 7** and **8** for the desired **Panels** under the **Panels/Readers column.**

10. **By default, the** Access Group Name **field will show the badge number of the Personnel record in question.**

Access Group Name: | Badge 59043

Fig. 32.61. Access Group Name field showing the default selection of badge number.

You can change the default naming by typing in a descriptive name for the dedicated access group.

Below we have named the access group we wish to dedicate for John Smith as *John Smith Access Only*

Access Group Name: | John Smith Access Only

Fig. 32.62. Entering a descriptive name for the dedicated access group.

11. **If required, a group can be selected for the selected badge holder by clicking the down arrow of** Group **control, and selecting a desired group name in the list. The group names listed will be those that are created in the Groups screen.**

Note: **In case no group names are seen in the list, you need to create some in the Groups screen, on the Personnel tab. Refer the section** Groups **to do this.**

12. **Click the** Save **button on the toolbar to save these settings.**

These settings will now allow the selected badge holder to have sole access to the mentioned **Readers,** during the specified **Time Schedules.** In our example, John Smith will have dedicated access to **President's Office, All the Time.**

Note: **Dedicated access group when created for a badge holder, will be automatically assigned to the <u>first</u> Access Group control on the Access Groups tab, for the badge holder record.**
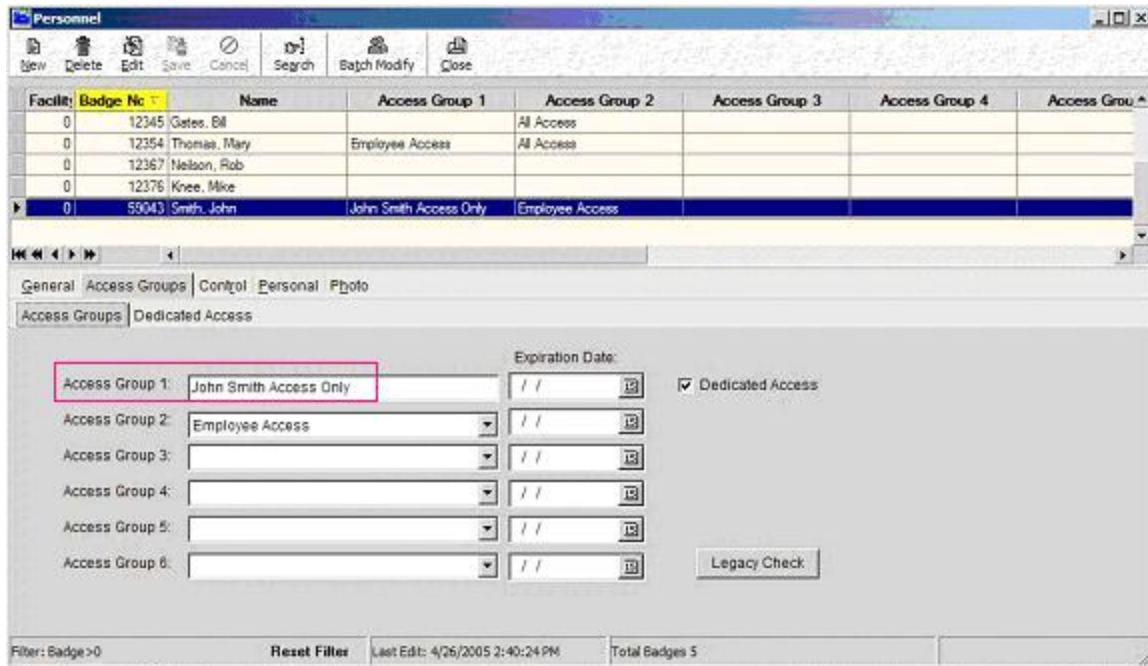
Fig. 32.63. Dedicated access group automatically assigned to Access Group 1 control.

Even if a standard access group had been assigned to Access Group 1 control previously, the dedicated access group will dominate and replace the standard access group assignment. Recall that we had previously assigned the access group *All Access* to Access Group 1 control for John Smith (see figure 32.34). But the dedicated access group *John Smith Access Only* has replaced *All Access* as seen in figure 32.63.

The (dedicated) Access Group Expiration Date works in the same way as it does on a standard access group. Once 'dedicated' access groups are created, they do not appear in the standard 'Access Groups' screen. However, every dedicated access group that is created does use up an access group number, just like a standard access group. The CardAccess permits a maximum of 1000 access groups. Every dedicated access group and standard access group that you create is subtracted from the total number available. **'Get Template' Button**

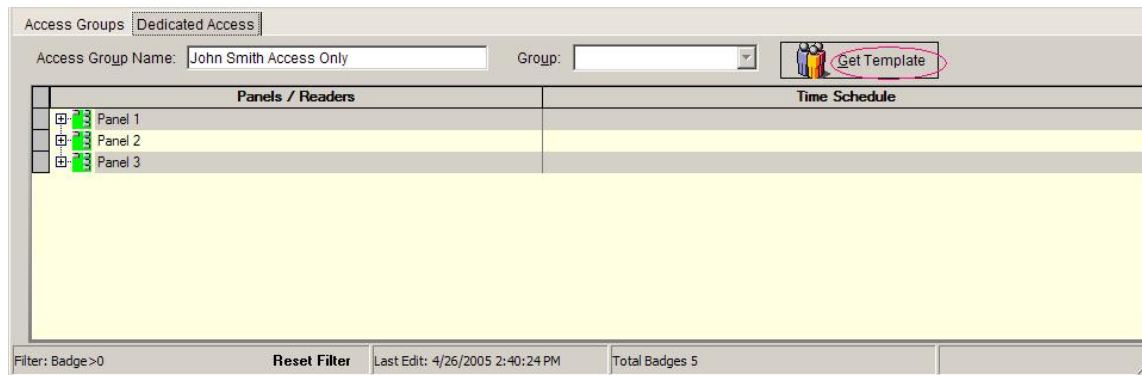The Dedicated Access sub-tab has a button named as 'Get Template'.

Fig. 32.64. The 'Get Template' button on the Dedicated Access sub-tab.

This button allows you to use the settings of a different access group (created earlier), as the basis for creating/editing the dedicated access group in question. Templates serve as a time saving feature as you can conveniently load the settings of an existing access group, without having to make those settings all over again.
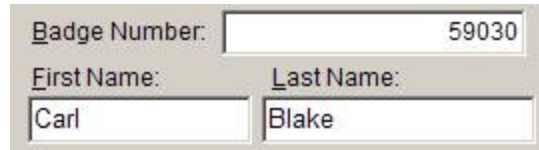
Below we explain how to use the 'Get Template' button to create a dedicated access group.

Using 'Get Template' Button

Below we will create a 'dedicated' access group for Carl Blake, the vice president of a company. To do this, we will use *John Smith Access Only* (dedicated access group for the President we created earlier) as the template. The following steps will be involved.

1. **Open** Personnel **screen by clicking on** Personnel **button or** Access→Personnel **menu options in the CardAccess main screen. The screen will open in the** *General* **tab by default.**

2. **The foremost action to take in the Personnel screen is to either search for or, create the badge holder record (by following steps explained under** Creating a Basic Working Badge**) for which you wish to create a dedicated access group.**
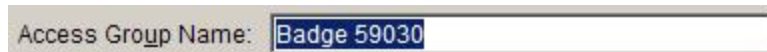
We will create **Carl Blake's** record by clicking the New **button on Personnel screen toolbar, and entering his** Badge Number **and** Name **in the respective fields, on the Personnel screen General tab.**

Badge Number:	59030
First Name:	Last Name:
Carl	Blake

Fig. 32.65. Entering Badge Number and Name of the Personnel.

3. **Click on** Access Groups **tab.**

4. **Click the** Dedicated Access **checkbox to select it. On clicking, you will find yourself in the Dedicated Access sub-tab.**

5. **The** Access Group Name **field in Dedicated Access sub-tab will (by default) show the badge number of the personnel in question.**
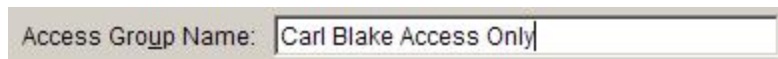
Access Group Name: Badge 59030

Fig. 32.66. Access Group Name field showing the default selection of badge number.

You can change the default naming by typing in a descriptive name for the dedicated access group.

Below we have named the access group we wish to 'dedicate' for Carl Blake as *Carl Blake Access Only.*

Access Group Name: Carl Blake Access Only

Fig. 32.67. Entering a descriptive name for the dedicated access group.

6. **If required, a group can be selected for the selected badge holder by clicking the down arrow of the** Group **control, and selecting a desired**

group name in the list. The group names listed will be those that are created in the Groups screen.

Fig. 32.68. The 'Group' control.

Note: **In case no group names are seen in the list, you need to create some in the Groups screen, on the Personnel tab. Refer the section Groups to do this.**

7. **At this point, none of the Readers listed under the Panels/Readers column will be assigned Time Schedules. You may check this by expanding the nodes (+ marks) seen to the left of the Panel names listed under the** Panels/Readers **column. The** Time Schedule **column against every Reader name will show you the default selection** *Not Used***.**
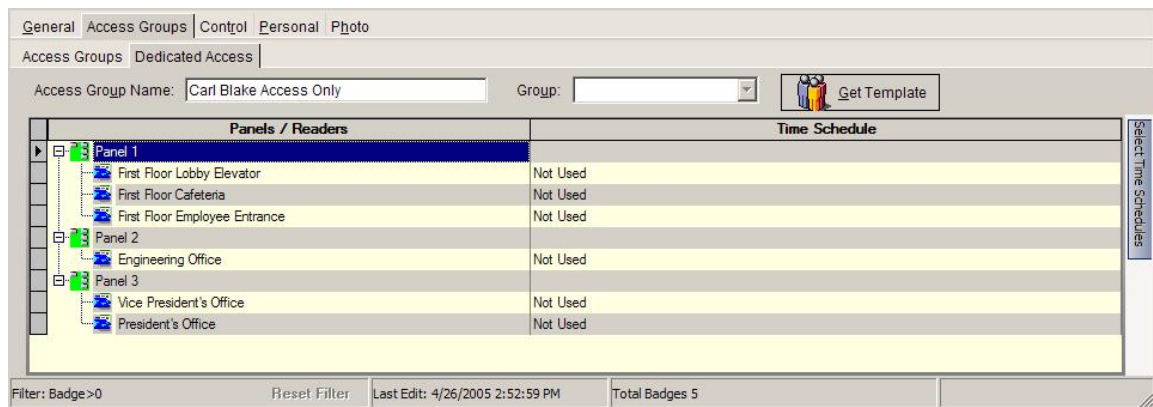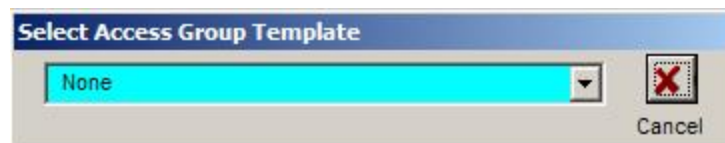

Fig. 32.69. All nodes expanded.

Checking this way will help you to understand the implications of selecting an access group template for the dedicated access group in question.

8. **Click the** Get Template **button. On clicking, the 'Select Access Group Template' dialog will be displayed.**

Fig. 32.70. The 'Select Access Group Template' dialog.

9. **In the** Select Access Group Template **dialog, click the down arrow of the control to view the list of available access groups in the CardAccess.**

Note:

*   **The drop down list will show the names of standard access groups (created in the 'Access Groups' screen)** <u>as well as</u> **'Dedicated' access groups (created in the 'Personnel' screen).**

*   **The drop down list will show access groups names** <u>only</u> **if they are created previously. If no access group names are seen in the list, you must create them afresh. To do this, refer the heading** [Creating a Dedicated Access Group](#) **above, or the heading 'Creating an Access Group' in the section titled** [Access Groups](#).

10. **Locate a desired** access group **in the drop down list, and click on it.**

In our example, we will be selecting the access group *John Smith Access Only*.
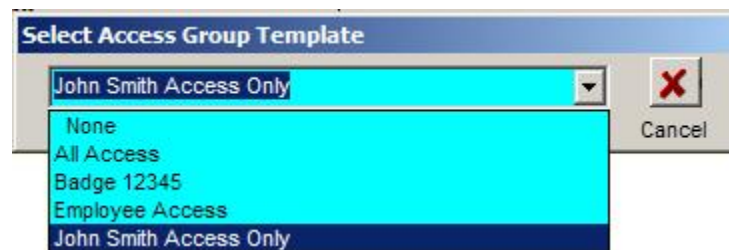
Fig. 32.71. Selecting an Access Group that will act as a template for the current access group.

On clicking, the time schedule settings of the selected access group will be loaded to the Readers of the current access group being created.

In the figure below, carefully observe the time schedule *All the Time* **loaded against the Reader** *President's Office* **on selecting the access group** *John Smith Access Only*.
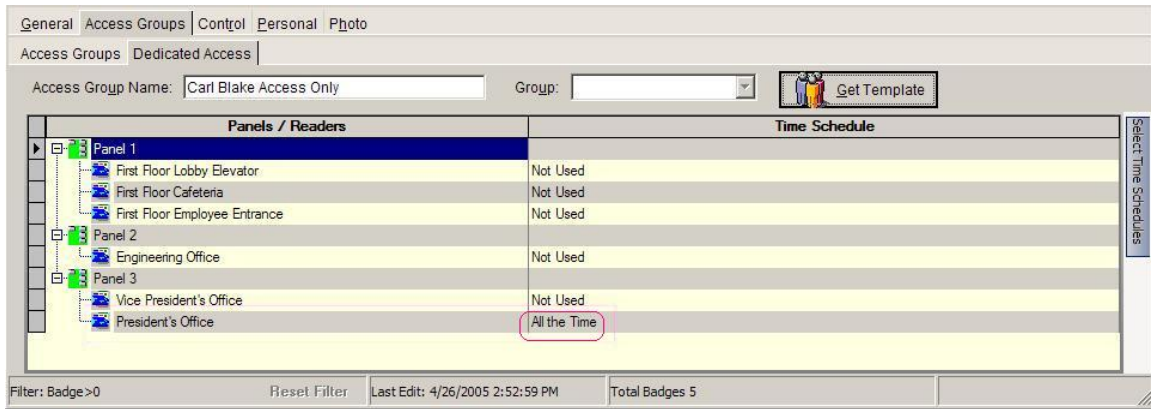
Fig. 32.72. Time Schedule settings after template selection.

11. You may now make changes to these settings, by making fresh Time Schedule assignments to the Readers of your choice.

Below, we have made time schedule assignment to Engineering Office Reader, belonging to Panel 2.

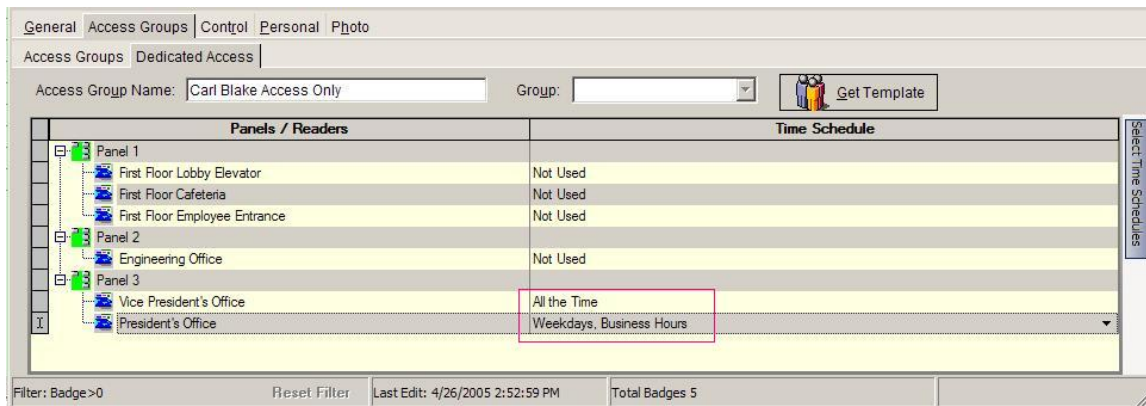**Fig. 32.73. Fresh Time Schedule assignments.**

12. Click the Save button on the toolbar to save these settings.

These settings will now allow the selected badge holder to have sole access to the mentioned Readers, during the specified Time Schedules.

In our example, Carl Blake will have dedicated access to Vice-President's Office *All the Time* and to President's Office during *Weekdays, Business Hours.*

Note: **Dedicated access group when created for a badge holder, will be automatically be assigned to the first Access Group control, on the Access Groups tab, for that badge holder record.**
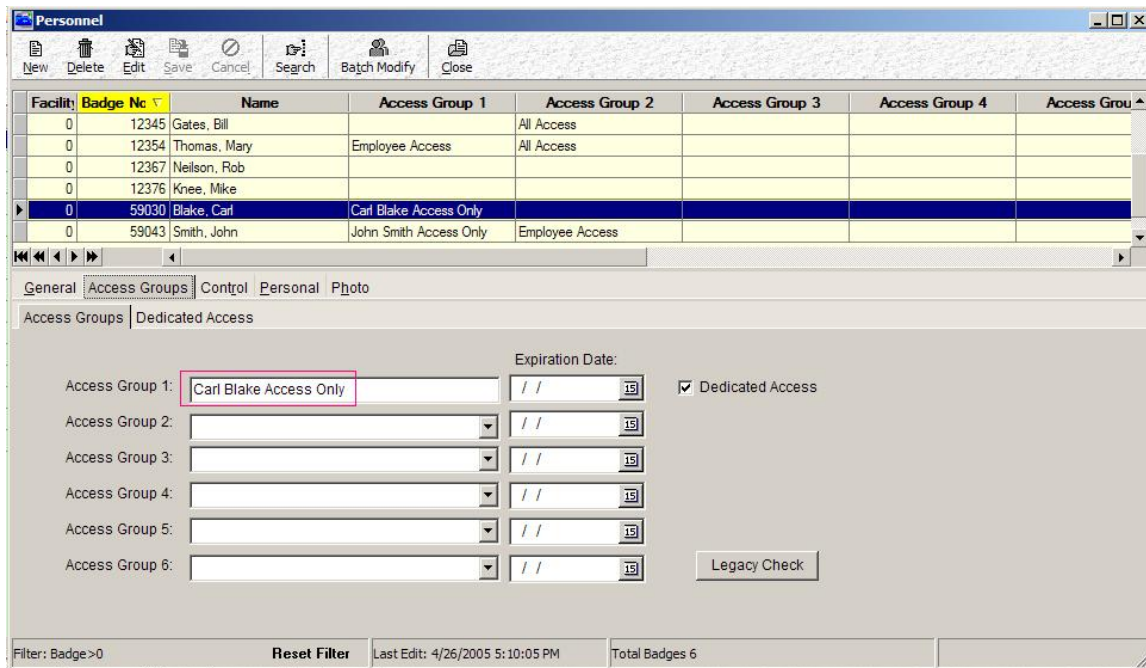
Fig. 32.74. Dedicated access group automatically assigned to Access Group 1 control.

Editing a Dedicated Access Group

Follow the steps below if you wish to edit a dedicated access group:

- **Open 'Personnel' screen by clicking on** Personnel **button or** Access→Personnel **menu options in the CardAccess main screen. By default, the screen will open in the** General **tab, and will not show any badge records.**

- **Select the record whose dedicated access group settings you wish to edit. Selection can be made in two ways as below.**

  a. **By clicking the** Show All Badges **button, and choosing the desired record or,**

b. **Searching for the required record by using a search criterion (refer the heading** [Searching for Personnel Records](#) **for details)**

- **Click on** Access Groups **tab, and then on** Dedicated Access **sub-tab.**

- **Click the** Edit **button on the toolbar.**

- **Make the** desired changes **to the controls on the Dedicated Access tab.**

- **Click the** Save **button on the toolbar to save the changes.**

- **Click the** Close **button on the toolbar to close the screen.**

Deleting a Dedicated Access Group

Following the steps below if you wish to delete the dedicated access group of a badge holder.

- **Open Personnel screen by clicking on** Personnel **button or** Access→ Personnel **menu options in the CardAccess main screen. By default, the screen will open in the** General **tab, and will not show any badge records.**

- **Select the record whose dedicated access group you wish to delete. Selection can be made in two ways as below.**

    a. **By clicking the** Show All Badges **button and choosing the desired record or,**

    b. **Searching for the required record by using a search criterion.**

- **Click on** Access Groups **tab.**

- **Click the** Edit **button on the toolbar.**

- **Click the** Dedicated Access **check box to deselect it.**

Upon clicking, the following message box will be displayed to inform that the 'delete' action is irreversible.

Fig. 32.75. Message box displayed before deleting the dedicated access group of a badge holder.

- **After confirming, click the** Yes **button in the message box to delete the dedicated access group.**

- **Click the** Save **button on the toolbar to save this change.**

- **Click the** Close **button on the toolbar to close the screen.**

Control Tab

Controls for Anti Passback and Alarm Shunt Settings for individual badge holders are available in the *Control* tab.

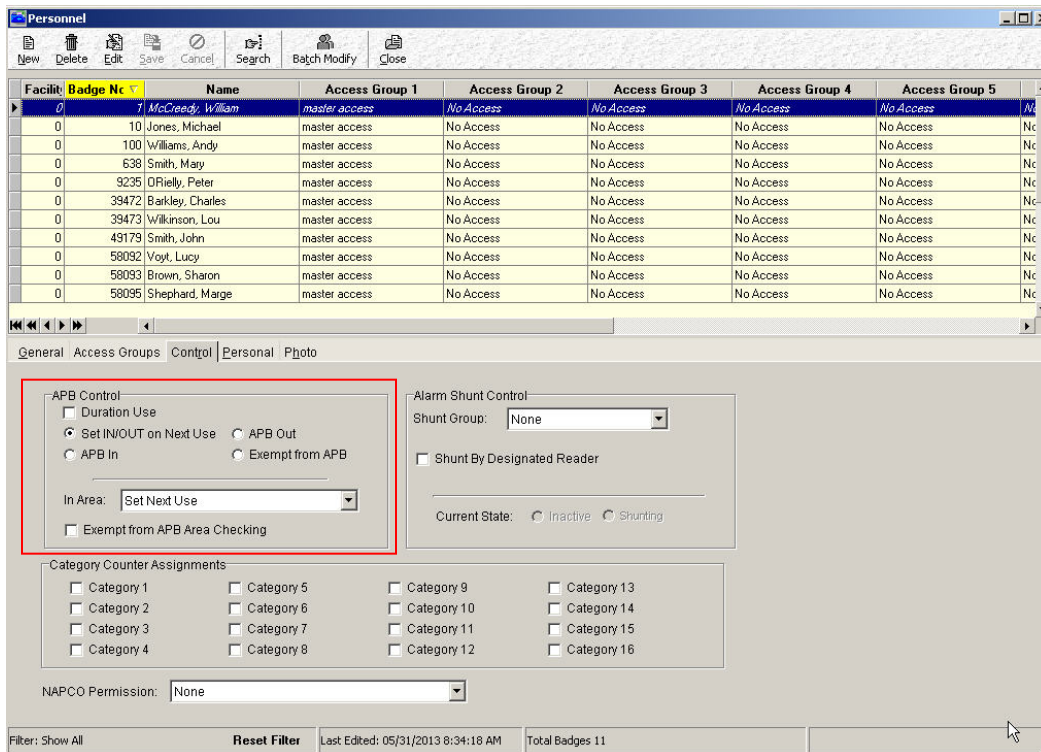A click on Control tab will display the screen below.

Fig. 32.76. Personnel screen 'Control' tab.

Anti Passback controls are on the left and Alarm Shunt controls are on the right sides of 'Control' tab as shown in the above figure.

Anti Passback (APB)

Anti Passback is a mode of operation that is set at a Reader (see Readers for more information). The function of Anti Passback is to prevent a card from being presented to the same Reader twice.

Controls for Anti Passback settings are provided in two screens- *Readers* and *Personnel*. Settings made in Readers screen apply to the <u>concerned Reader</u> at the door, as well as to <u>all cardholders</u> accessing the door. Whereas, settings made in the <u>Personnel</u> screen are applied to each <u>cardholder individually</u>. Personnel screen settings allow Anti Passback operation to be modified for a cardholder individually, without affecting the Anti Passback settings for the other cardholders who access the given Anti Passback enabled door.

Note: Anti Passback controls in the Personnel screen work in conjunction with the Anti Passback controls in the Options tab of the Readers screen. Anti Passback processing parameters must be set in <u>both</u> locations or Anti Passback will not be enabled.

Personnel APB Controls

APB controls are seen on the left side of Personnel screen 'Control' tab as shown in the figure below.

Fig. 32.77. APB controls for personnel.

The controls are explained below.

Duration Use

The Duration Use control is used in conjunction with a timer called '*Duration Use Time*', which is set in Options tab of Readers screen. The basic operation of Duration Use is to allow the setting of a time period duration which, successive reads of the same badge will be blocked, until the timer expires.
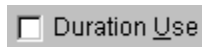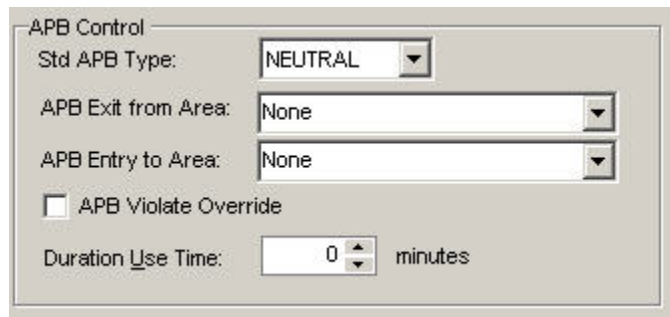

Fig. 32.78. Personnel 'Duration Use' Control.

Fig. 32.79. Readers screen APB controls.

The 'Duration Use' control in a Personnel record has several modes of operation. Which mode is active, depends on settings in the Readers screen. The modes are discussed below.

Timed Re-Entry

With no Anti Passback set at the Reader (that is, Reader set to 'Neutral' as in figure 32.79), the Reader allows unlimited badge reads of the same card, by default. When a Duration Use Time is set in the Readers screen, and the Duration Use feature is enabled in a card holder's Personnel record, that card holder will be blocked from re-entering the same door until the time out period has expired. Other badge holders who do not have the Duration Use times set in their records are not blocked from re-entering the door as the Reader is not in Anti Passback

mode. This type of Reader functionality is more accurately termed as 'Timed Re-Entry'.
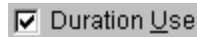

Fig. 32.80. 'Duration Use' box in Personnel screen checked for Timed Re-Entry.
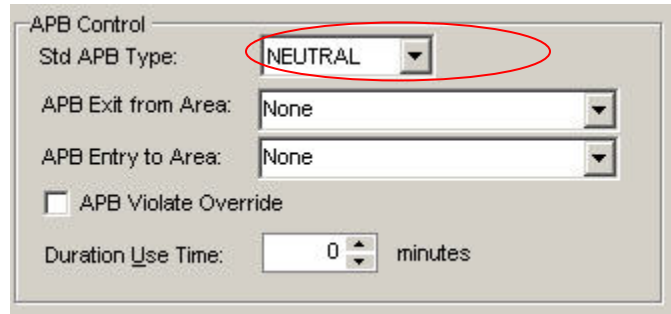
Fig. 32.81. APB Type set to 'Neutral' in Readers screen Options tab, for Timed Re-Entry .

Note: The alert message generated for a timed re-entry violation (Badge Violate Re-Use) is different from an Anti Passback violation.

Timed APB

With Timed APB reader functionality, one or more readers are set up as Anti Passback readers (where option IN/OUT is selected in APB Type control, as in figure 32.83). A Duration Use Time is also set on each of those readers. The Duration Use feature can then be enabled for selected Personnel records. Those badges that have Duration Use enabled, will be able to re-enter an Anti Passback reader after the time out period has expired. Badge holders who do not have Duration Use set in their badge records will be denied the option of re-entering any APB enabled door (they cannot re-enter until they 'exit').

Fig. 32.82. 'Duration Use' box in Personnel screen checked for Timed APB.

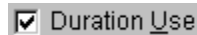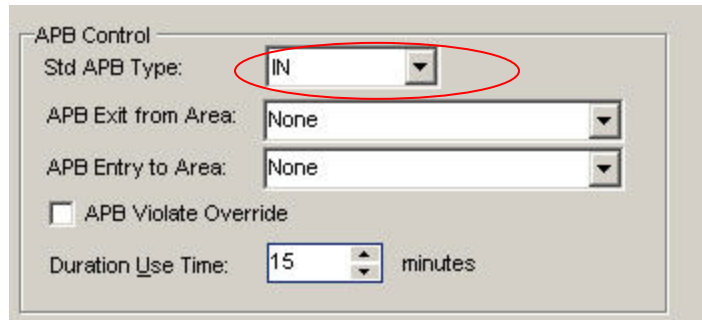**Fig. 32.83. APB Type set to 'In' in Readers screen Options tab, for Timed APB.**

APB Setting

The APB setting is a manual method of <u>presetting</u> the Anti Passback status for the highlighted cardholder. When a cardholder's card is presented to an Anti Passback **IN** reader, the status of that card holder is said to be 'IN'. When a cardholder's card is presented to an Anti Passback **OUT** reader, that cardholder is said to be **'OUT'** (of the building).

The APB setting controls offer the CardAccess administrator a way to preset the current APB status of a cardholder. The following options are available:

- *In:* Sets the card holder status to **IN** the building
- *Out:* Sets the card holder status to **OUT** of the building
- *Exempt from APB:* Sets the cardholder to be 'immune' from Anti Passback rules. The card acts as though Anti Passback is not enabled at any **APB** reader.
- *Set IN/OUT on Next Use:* Sets the cardholder's status to **IN** or **OUT** based on which type of APB reader (IN or OUT) the next card read comes from.
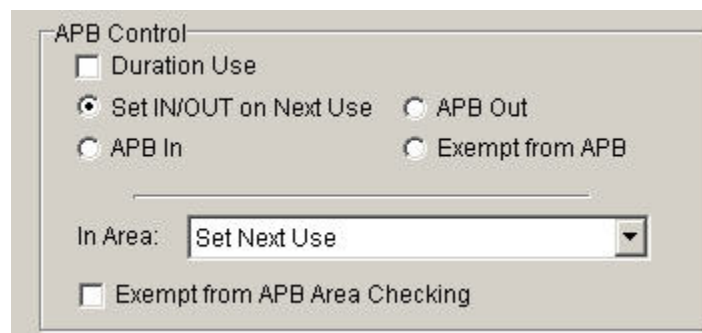
Fig. 32.84. APB Setting controls in Personnel screen.

Alarm Shunt Control

An 'Alarm Point' by definition is (usually) a set of contacts of some type that are connected by wires to an alarm panel 'Input' (ours or someone else's). 'Alarm Shunting' is a term that refers to the (old technology) act of bridging a shorting wire across the contacts of an Alarm Point, to prevent that Alarm Point from triggering an alert, when an access door is opened. In effect, the system is 'faked' into believing that the door is still closed so an alarm is not sounded.

Shunting is often used with burglar alarm systems so that authorized entries and exits can be made to and from a building, without the need to disarm the alarm system. However, the explanation above that detailed using a piece of wire to short the contacts of an alarm point is highly over simplified. There is some specialized hardware and software that has been created to perform these shunting functions.

There are two types of shunting used in modern access control systems such as the CardAccess. They are- hardware shunting and software shunting. Hardware shunting uses relays to accomplish 'hardwire bridging' across input points. Software shunting is discussed in detail below.

Every panel made by Continental is shipped with some number of (software programmable) alarm inputs. Since those inputs are under software control, the status of those inputs can easily be ignored by the software. Ignoring input status messages (on purpose) is called 'software alarm shunting'. When software shunting is enabled, the software ignores the status messages of one input or a group of inputs.

By enabling the shunt feature in a cardholder record, that badge holder's card is set up as a 'shunt card'. A shunt card opens doors just like a standard card, but the shunt card has an additional special feature. Once shunting is enabled in a cardholder record, that cardholder can enable or disable shunting at a reader or group of readers.

What we mean when we say 'enable or disable shunting' is, when the shunt card is presented to a reader, the door strike is activated (opening the door like a normal card), and shunting is activated. When the same card is presented again to the same reader, shunting is deactivated.

The most understandable example of an application for alarm shunting happens when the access control or security system includes Programmable Infrared Sensors (PIRS). These sensors trigger every time they see 'moving heat' (moving people). That means that when a building is fully occupied during the day, these sensors will be constantly triggering (false) alarms.

Here is a case where you may not want to disable the entire access control system (because you want to maintain security at the doors), but you do want to disable the PIR inputs (or perhaps, other types of inputs that are located inside the building perimeter). The alarm shunting function was designed for just such a purpose.

For example, you can set up a manager's access card as an alarm shunt card. When the manager arrives in the morning to open the building and presents his or her card to a door, the door opens as normal, but the PIR inputs are turned off as well (shunting is turned on). The rest of the access control system remains operationally unchanged.

Setting Up a Shunt Card

Setting up alarm shunting at a door or group of doors is a two-step process.
- You need to decide which badges will be allowed to turn the shunting feature on and off and
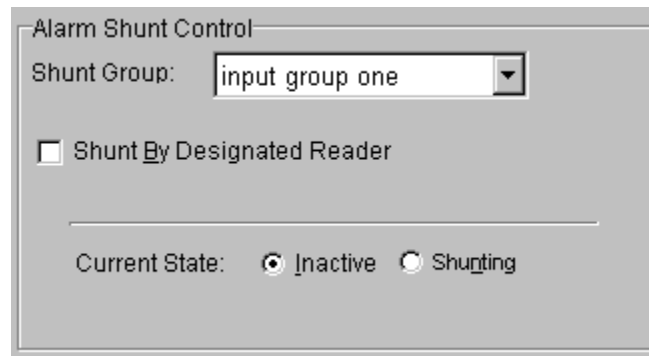- You need to decide which inputs or groups of inputs will be shunted, and by which cards

Note:
- o Before you can shunt groups of Inputs, you must create Input Groups in the Groups screen, available from the Administration menu. See the manual section on **Groups** for more information

- o You can create a number of different shunt cards - cards that shunt different groups of inputs, a number of cards that shunt the same group of inputs, cards that turn on shunting at one door only, some cards that turn on shunting of an input group from any reader, other cards that turn on shunting at shunt designated readers only.

Alarm shunting can be set up to operate in any one of the three modes. Which mode is active for a particular card is determined by the alarm shunt control settings on the Control tab of the Personnel record. There are also some companion settings that must be made in the Readers screen for some modes as explained below.

Shunt a Group of Inputs from Any Reader

In Personnel screen, if you add a Shunt Group to any card holder record, but do not enable the 'Shunt by Designated Reader' check box, that card will turn on shunting of the selected Input group from any reader in the system. Be sure that the 'Alarm Shunt Reader' check box remains unchecked in the Readers screen.

Fig. 32.85. Personnel screen settings to shunt a group of Inputs from any Reader.

Shunt a Group of Inputs from Shunt Designated Readers

In Personnel screen, if you add a Shunt Group to any card holder record, and you enable the 'Shunt by Designated Reader' check box (refer figure 32.86), that card will turn on shunting from shunt designated readers only. The 'Alarm Shunt Reader' box in Readers screen must be checked to designate a reader as a shunt reader (refer figure 32.87).
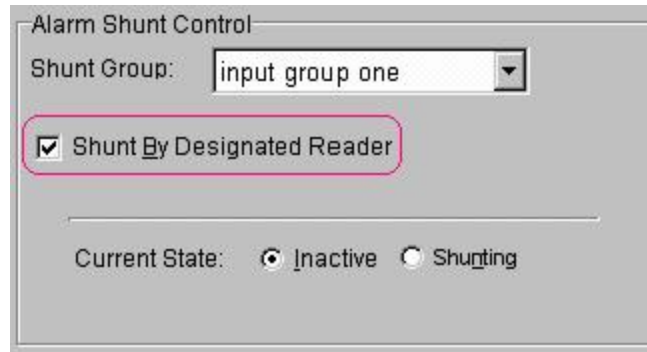
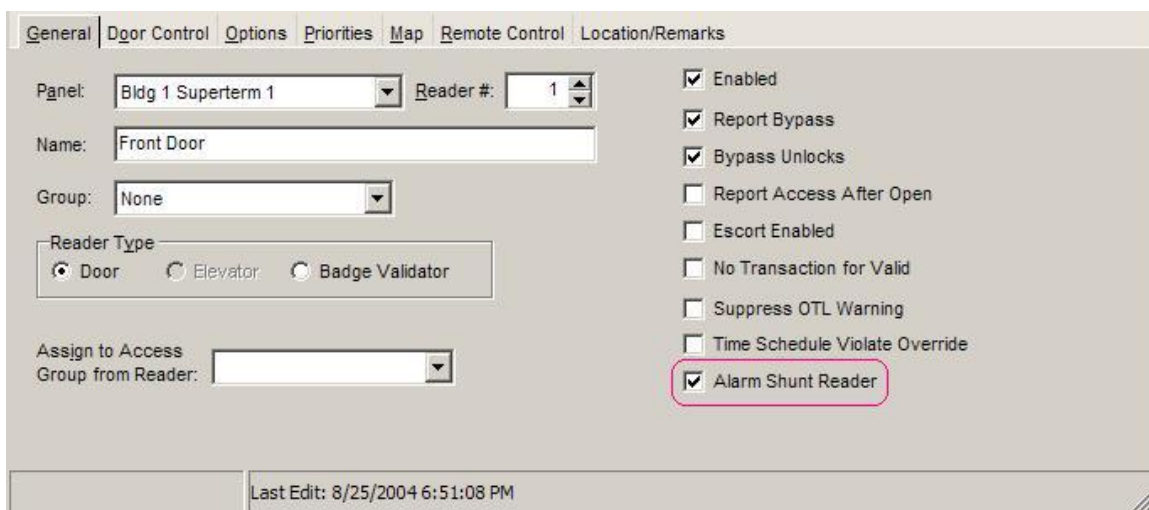Fig. 32.86. Personnel screen settings for shunting by designated reader.

Fig. 32.87. 'Alarm Shunt Reader' box checked in Readers screen to enable shunting by designated Reader (here, Front Door Reader).

Note: **Alarm Shunting can be enabled for an indefinite period of time if the selected Reader belongs to a MicroTerm, MiniTerm, SmartTerm, Super 4 or a SuperTerm panel.**

In case the selected Reader belongs to a newer panel such as a SuperTerm +, Turbo SuperTerm, Super 4 +, Turbo Super 4 or a Super 2 Panel, a new control named Max Shunt Time **(see figure below) will be displayed after you check the 'Alarm Shunt Reader' checkbox. This control can be used to fix the maximum shunt time you wish to allow for the selected Reader.**
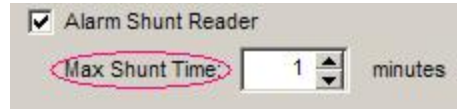
Maximum Shunt Time control displayed when Alarm Shunt Reader checkbox is enabled for Readers connected to SuperTerm +, Turbo SuperTerm, Super 4 +, Turbo Super 4 or Super 2 Panels.

The default time shown for this control is 1 minute. The control allows you to fix up to 500 minutes of Alarm Shunting for the selected Reader.

If desired, you can change the default time by

- o Clicking the white space of the control, and typing in a number of choice. The maximum number you can enter is 500.

- o Or you can use the arrow buttons of the spin control to choose a desired number.

Once the Max Shunt Time specified elapses, the system will generate the 'Door Open Too Long' event message for activities (if any) at the selected Reader.

Shunt One Door

In Personnel screen, if you enable 'Shunt by Designated Reader' but <u>do not</u> add a shunt group (figure 32.88), that card will shunt the door contact of whichever door the card is presented to. All door contact messages will be suppressed at that door as long as the door remains open. This means that if the door were left open after the entry, the 'Door Open Too Long' event message would not be broadcast. Input shunting for that door is disabled when the door contact closes.
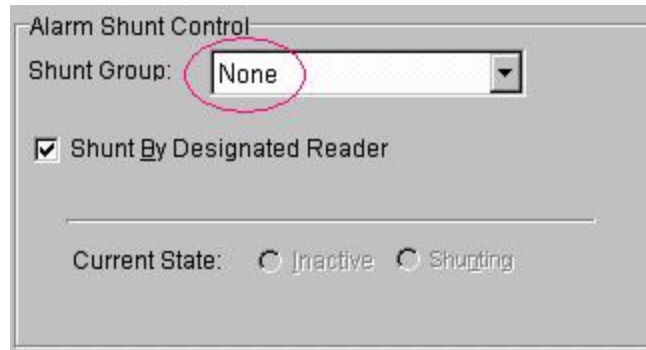
Fig. 32.88. Personnel screen settings to shunt one door only (any door).

Shunt Event Messages

When you activate or deactivate shunting using a badge at a reader, there are event messages sent from the panel to the CardAccess software (seen below in Figure 32.89). Note that the name of the badge holder who activated shunting is shown as well as the shunt group that was activated and the door where the badge read occurred.

ALARM SHUNT ON	Smith, John ->Alarm Shunt Group	3-1 Front Door		10:26:12 PM 9/28/2004		10:26:14 PM 9/28/2004	70
ALARM SHUNT OFF	Smith, John ->Alarm Shunt Group	3-1 Front Door		10:26:16 PM 9/28/2004		10:26:18 PM 9/28/2004	70

Fig. 32.89. Shunt Event Messages in CardAccess.

Manually Activate/Deactivate Shunting

There is a way to turn the shunt feature on and off manually (in addition to turning the feature on and off using an access control badge). To manually activate or deactivate shunting, follow the steps below:

- **Open the** Personnel **Screen.**

- **Click on the** Control **Tab.**

- **Click on the Personnel record that has shunting enabled.**

Note: **Only badge records that have a shunt group selected have the ability to activate shunting manually. If a shunt group is not selected in a given badge record, manual shunting is not available.**

- **Click on the Words "Current State".**
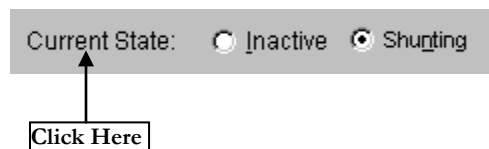
Fig. 32.90. Manual Shunt Control.

Upon clicking the following message box will appear.

Fig. 32.91. Shunt warning dialog.

- **Click the** Yes **button in the warning dialog.**

Change in alarm shunt status can be seen by closing and re-opening the Personnel screen, and highlighting the Personnel record whose shunt status you attempted to change. The status would have changed from 'Inactive' to 'Shunting' or vice versa.

Personal Tab

The Personal tab provides a number of fields for entering personal notes about a cardholder. These fields are primarily notation fields. Although the fields are not active like those on the General tab, they are still available to reports and to the Badge Editor software.

A click on the Personal tab will display the screen below.

Fig. 32.92. Personnel screen in Personal tab.

The Personal tab fields in figure 32.92 are explained below.

Soc. Sec

This field is meant for entering the Social Security Number of the badge holder. The field accepts nine numeric digits only.

Company ID, Department, and Location

These fields are meant for entering the Company Name, Department and Location in which the badge holder works. Each of these fields accepts sixteen alphanumeric characters. These three fields are also special because as you enter names in these fields, they create a list of names already entered. After

the list has been started, you can then choose a name from the drop down list instead of typing in a name.

Supervisor

This field is meant for entering the name of the badge holder's Supervisor. The field accepts <u>nineteen</u> alphanumeric characters. This field is also creates a list of names as you enter them, like the above mentioned fields.

Hire Date

This field allows you to enter the date of hiring the personnel. The date can be entered in the following two ways:

- o Typing a date of choice in the Hire Date field. The date entered must be in **MM/DD/YYYY** or **MM/DD/YY** date format.

- o By using the calendar to choose a desired date. This can be done by following the steps below:

    - ▪ Click the calendar button (numbered as 15) found on the right side of *'Hire Date'* control. Upon clicking, a calendar window of the current month and year will be opened, with the current date in highlight.
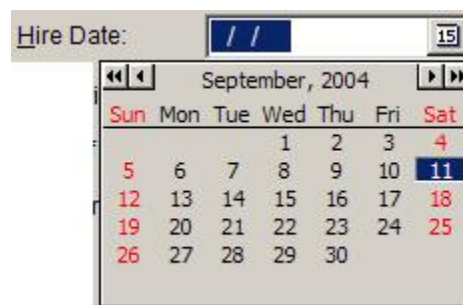

Fig. 32.93. Calendar window displayed by clicking on calendar button (numbered as 15).

Note: **Double left/right arrows and single left/right arrows are provided at the top of the screen to scroll backward/forward through the dates/months of a year, to aid in desired date selection.**

- **Click on a desired date in the calendar.**

Hire Date is a non-active field. The date in this field is not connected to any program logic.

Date of Birth

This field is for entering the badge holder's Date of Birth. The date can be entered in the following two ways:

o **Typing a date of choice in the Date of Birth field. The date entered must be in MM/DD/YYYY or MM/DD/YY date format.**

o **By using the** calendar **to choose a desired date. This can be done by following the steps below:**

- **Click the calendar button (numbered as 15) found on the right side of** *'Date of Birth'* **control. Upon clicking, a calendar window of the current month and year will be opened with the current date in highlight.**

Fig. 32.94. Calendar window displayed by clicking on calendar button (numbered as 15).

Note: **Double left/right arrows and single left/right arrows are provided at the top of the screen to scroll backward/forward through the dates/months of a year, to aid in desired date selection.**

- **Click on a desired date in the calendar.**

Gender

This field is for specifying the Gender of the badge holder. The default selection for this field will be 'Unspecified'. The Badge Holder's Gender can be specified by clicking the down arrow of the 'Gender' control and choosing a gender in the drop down list.

Phone, Ext

These fields are provided for entering the badge holder's contact phone numbers and their extensions. The fields accept ten and eleven alphanumeric characters respectively.

Vehicle/Make

This field is provided for entering a description of the badge holder's automobile. The field accepts a maximum of seventeen alphanumeric characters.

License Plate

This field is provided for entering the License Plate number of badge holder's automobile. The field accepts a maximum of eleven alphanumeric characters.

Remarks

The remarks field is provided for entering remarks/comments on the badge holder. The field accepts a maximum of two hundred and fifty five characters.

Middle Name

This field is for specifying the middle name of the badge holder. The field accepts a maximum of 30 alphanumeric characters.

Photo Tab

The Video Badging software is shipped as a part of the CardAccess software package. But, the Video Badging software is disabled by default. The 'Photo' tab in Personnel screen will be visible only if Video Badging is enabled in the System Settings screen. For enabling Video Badging, refer the heading Video Badging Tab in the section titled System Settings.

Note: The Video Badging package must be purchased separately.

The Photo tab has two working modes depending on the option (*Photos Only* or *Badging 3000*) selected in the System Settings screen. The buttons visible on the tab are also dependant on the option (*Photos Only* or *Badging 3000*) you select. The tab will have lesser number of buttons in the 'Photos Only' mode.

In this section, we will only discuss the 'Photos Only' mode. Badging 3000 mode is explained in the section Badging 3000 Interface in CardAccess.

Photos Only Mode

When the *Photos Only* option is selected in the System Settings screen, the Photo tab in Personnel screen will be displayed as below.
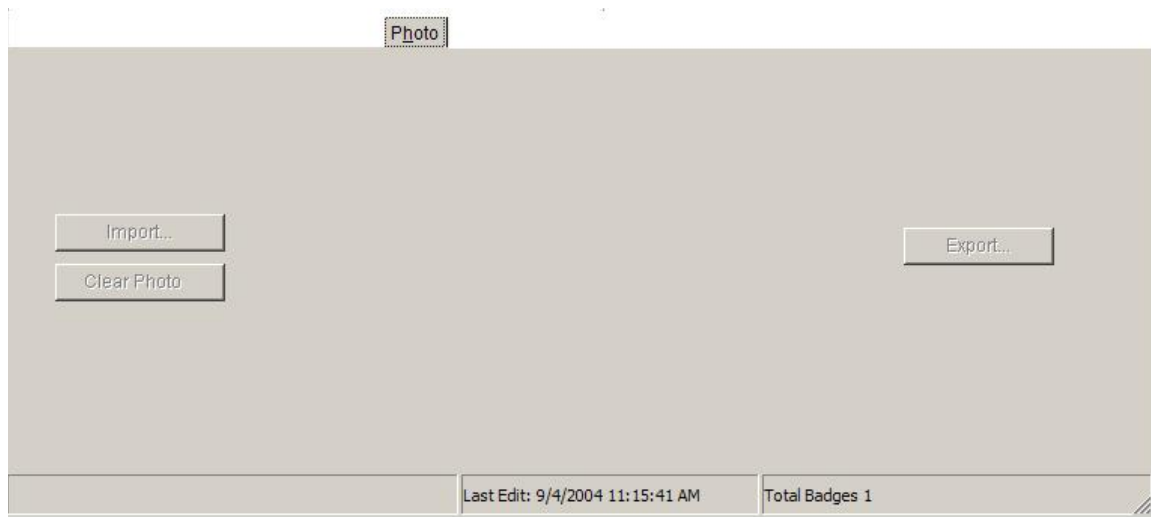
Fig. 32.95. Personnel screen Photo tab when 'Photos Only' option is selected in System Settings screen.

As shown in the above figure, Photo tab will provide only three buttons in the 'Photos Only' mode- *Import*, *Clear Photo*, and *Export*.

Thus, in this mode it is <u>only possible</u> to import the existing images that were created using another manufacturer's software package. It is <u>not possible</u> to do the following in Photos Only mode:

- o **Creating a badge design.**

- o **Printing or previewing a badge design.**

- o **Capturing an image.**

- o **Capturing a signature.**

Note:

o The buttons in figure 32.95 are grayed out. They can be enabled by clicking the *Edit* button on the toolbar.

The button controls of the Photo tab in 'Photos Only' mode are explained in the following section.

Photo Tab Controls in 'Photos Only' Mode

The button controls of Photo tab in 'Photos Only' mode are explained below.

Import

Clicking on Import button will bring up the 'Import A Photo Image' dialog that allows searching of the hard drive or network drives for importing an image. The window supports .bmp, .jpg, .wmf and .gif type image files.
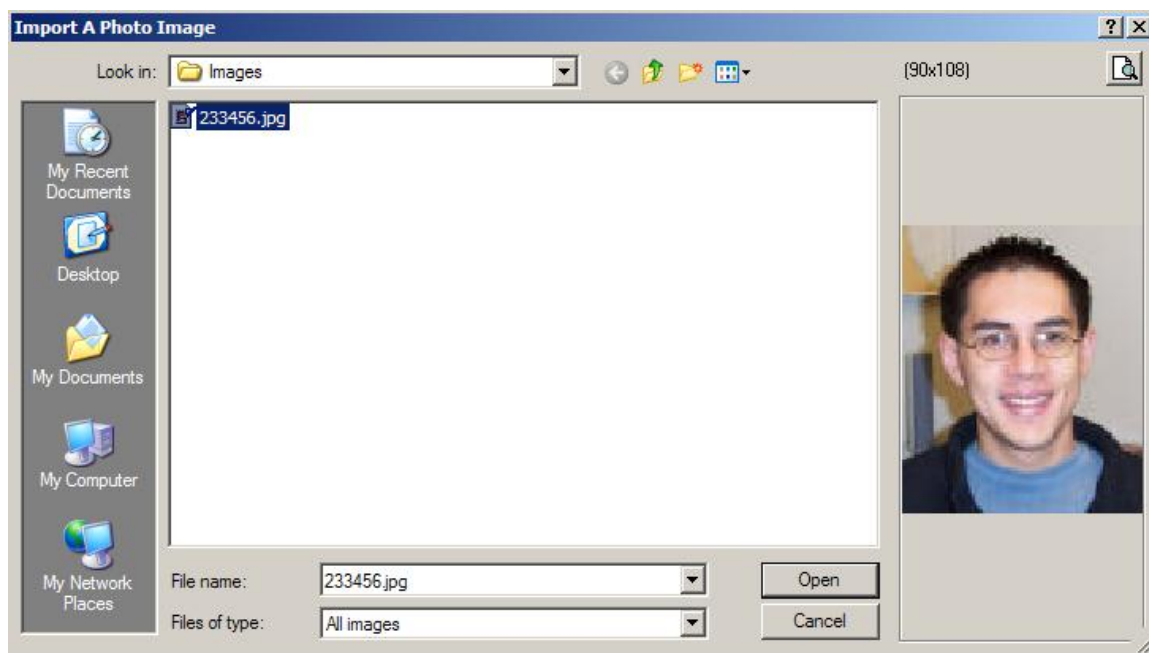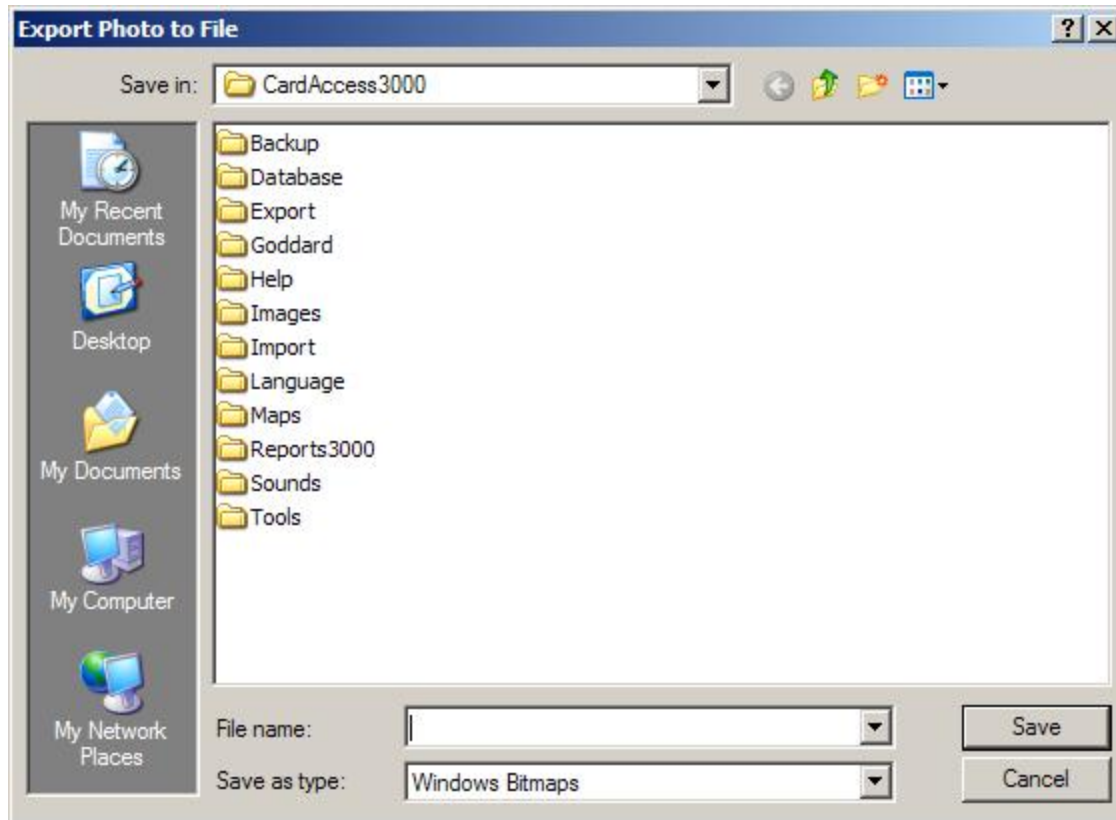

Fig. 32.96. 'Import A Photo Image' dialog.

Export

Clicking the Export button will bring up the 'Export Photo to File' dialog that allows exporting of the badge holder's image to a bitmap type file. A destination folder and a filename must be selected in the dialog.
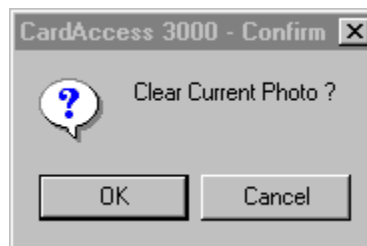
Fig. 32.97. The 'Export Photo to File' dialog.

Clear Photo

The 'Clear Photo' button will be visible only if the selected badge record has a photo assigned to it. Clicking this button will clear the badge holder's photo from the record. The system displays a warning message before deleting the image.


Fig. 32.98. The 'Clear Photo' warning dialog.

Custom Fields Tab

The Custom Fields tab will be seen on Personnel screen only if Custom Fields have been created in the System Settings screen. This tab will have the same name as the 'Page Title' entered in the System Settings 'Custom' tab. For creating Custom fields, refer the heading 'Custom Tab' in the section titled **System Settings.**

The Custom Fields tab is used in case where the user needs more notation type fields than are provided on the Personal tab. Custom fields can be titled according to the user's choice.
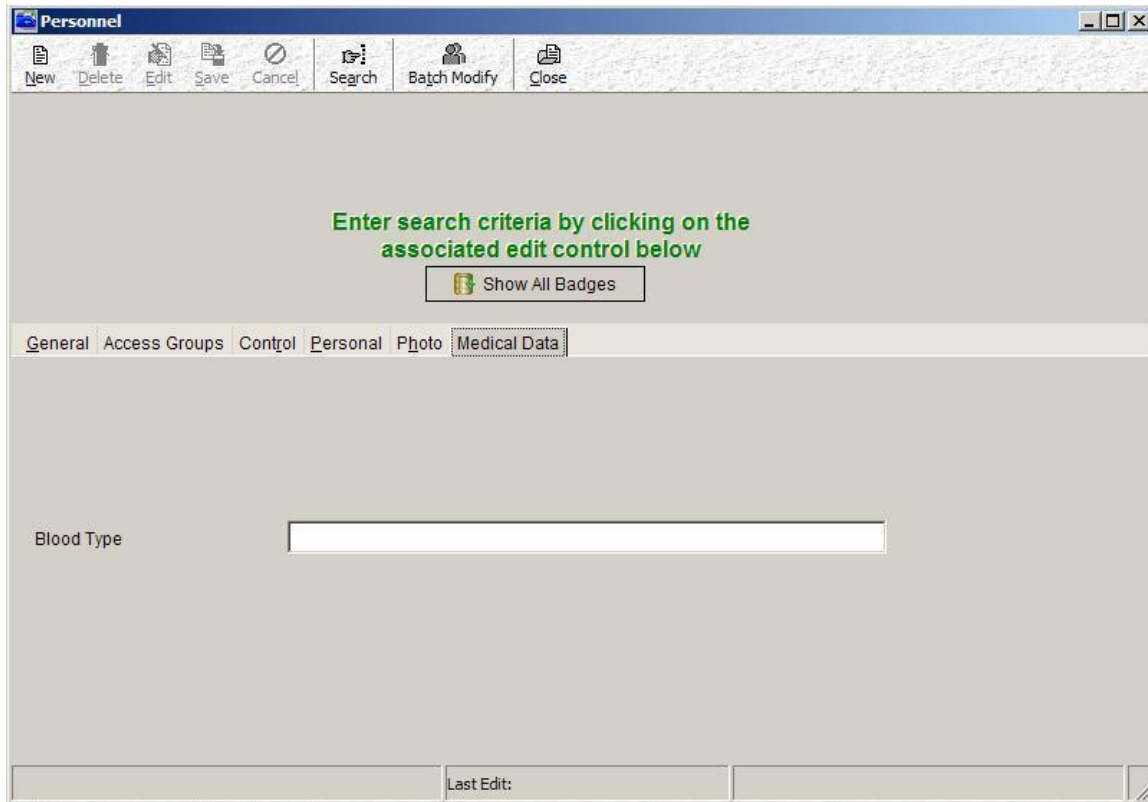
Fig. 32.99. Personnel screen in Custom Fields tab (titled Medical Data) showing 'Blood Type' field that was created in System Settings 'Custom' tab.