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# User Editing How2

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# Revision History

Name	Date	Reason For Changes	Version
MDH	5-Nov-10	Initial document	0.1

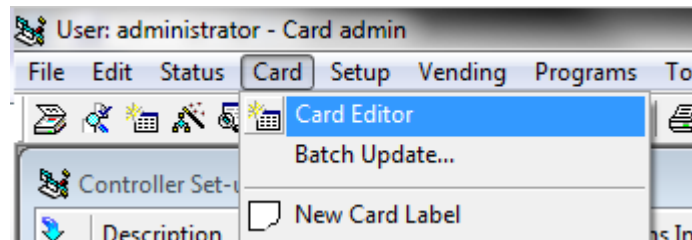
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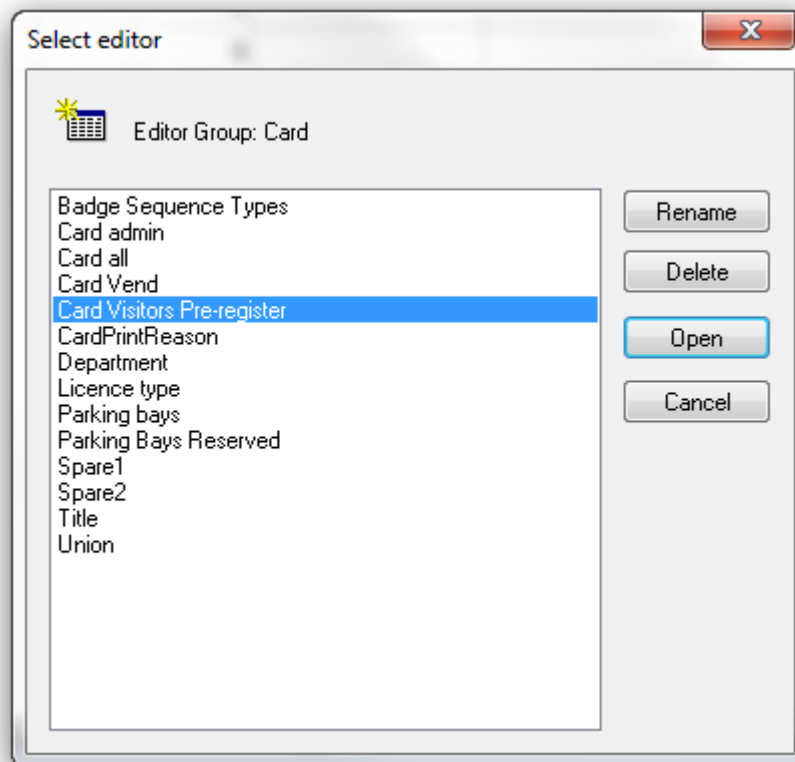
# 1. Card Editor

## a. To Open the Card editor

1. On the menu bar click on “**Card**”, then select “**Card Editor**”.



2. The **Select Editor** dialog box will appear.
  - a. **Card Admin**: Displays data generally edited by Admin staff.
  - b. **Card All**: Displays all card data.
  - c. **Card Vend**: Displays vending data generally edited by Vending/canteen staff.



3. Select “**Card Admin**” and click on open.
4. The **Card Admin** table will appear.

User: administrator - [Card admin]

File Edit Status Card Setup Vending Programs Tools View Window Help

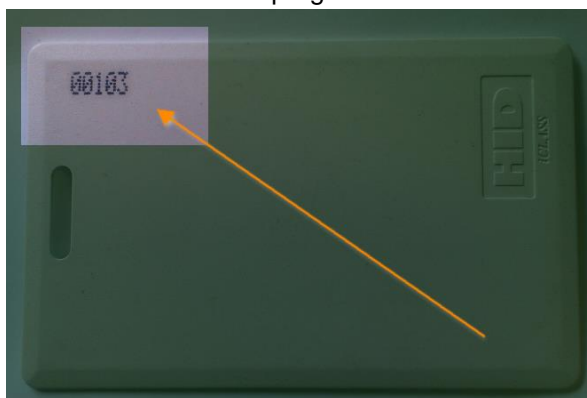
	Status	Card	Name	First Name	Title	Area Group	Company	Department	ID Number	Employ Nu...	Phone Cell	Car Regi
1	Disabled		zCard 001		None	Area group 0		Department 0		zEmploy 001		
2	Disabled		zCard 002		None	Area group 0		Department 0		zEmploy 002		
3	Disabled		zCard 003		None	Area group 0		Department 0		zEmploy 003		
4	Disabled		zCard 004		None	Area group 0		Department 0		zEmploy 004		
5	Disabled		zCard 005		None	Area group 0		Department 0		zEmploy 005		
6	Disabled		zCard 006		None	Area group 0		Department 0		zEmploy 006		
7	Disabled		zCard 007		None	Area group 0		Department 0		zEmploy 007		
8	Disabled		zCard 008		None	Area group 0		Department 0		zEmploy 008		
9	Disabled		zCard 009		None	Area group 0		Department 0		zEmploy 009		
10	Disabled		zCard 010		None	Area group 0		Department 0		zEmploy 010		
11	Disabled		zCard 011		None	Area group 0		Department 0		zEmploy 011		
12	Disabled		zCard 012		None	Area group 0		Department 0		zEmploy 012		
13	Disabled		zCard 013		None	Area group 0		Department 0		zEmploy 013		
14	Disabled		zCard 014		None	Area group 0		Department 0		zEmploy 014		
15	Disabled		zCard 015		None	Area group 0		Department 0		zEmploy 015		
16	Disabled		zCard 016		None	Area group 0		Department 0		zEmploy 016		
17	Disabled		zCard 017		None	Area group 0		Department 0		zEmploy 017		
18	Disabled		zCard 018		None	Area group 0		Department 0		zEmploy 018		
19	Disabled		zCard 019		None	Area group 0		Department 0		zEmploy 019		
20	Disabled		zCard 020		None	Area group 0		Department 0		zEmploy 020		
21	Disabled		zCard 021		None	Area group 0		Department 0		zEmploy 021		
22	Disabled		zCard 022		None	Area group 0		Department 0		zEmploy 022		
23	Disabled		zCard 023		None	Area group 0		Department 0		zEmploy 023		
24	Disabled		zCard 024		None	Area group 0		Department 0		zEmploy 024		
25	Disabled		zCard 025		None	Area group 0		Department 0		zEmploy 025		
26	Disabled		zCard 026		None	Area group 0		Department 0		zEmploy 026		
27	Disabled		zCard 027		None	Area group 0		Department 0		zEmploy 027		
28	Disabled		zCard 028		None	Area group 0		Department 0		zEmploy 028		
29	Disabled		zCard 029		None	Area group 0		Department 0		zEmploy 029		
30	Disabled		zCard 030		None	Area group 0		Department 0		zEmploy 030		
31	Disabled		zCard 031		None	Area group 0		Department 0		zEmploy 031		
32	Disabled		zCard 032		None	Area group 0		Department 0		zEmploy 032		

MICHAEL-PC

## a. Quick Edit

Certain information could be edited on the shown screen

- **Xref:** Reference of the card.
- **Status:** Status of the card (**This is a required setting**)
  - **Enabled:** The card is configured to work on the system
  - **Disabled:** The card will not work on the system
  - **Capture:** The card is enabled but will be captured at a reader set for capture. Requires the setting at capture group.
- **Card:** The card number. If the DB Mode is set to 02 XREF. Then the card number must be equal to the Xref number. If the DB Mode is set to 10, Random, then the card number can be any card number. (**This is a required Setting**)
  - The card number is the number programmed on the card



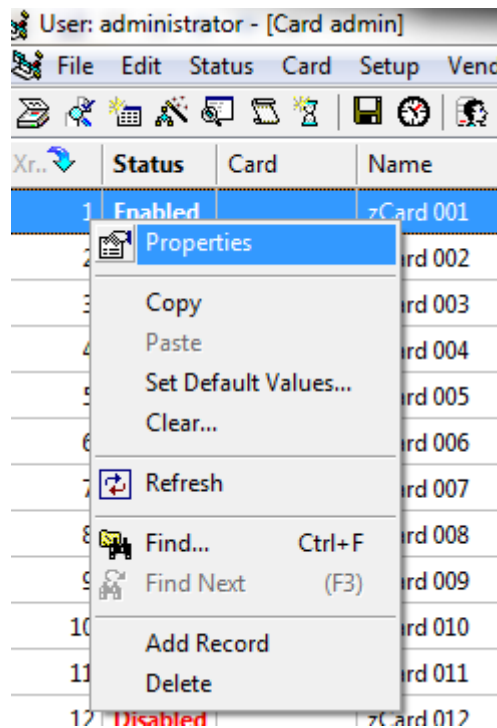
- **Name:** The card Holders Surname
- **First Name:** The Card holder's First name.
- **Title:** The Title of the card holder, EG: MR. Mrs.
- **Area Group:** This is a list of predefined Area Groups(**This is a required setting**)
- **Company:** the Company of the card holder.
- **Department:** The department to which the card holder belongs
- **ID Number:** The ID(Identity Document) Number of the card holder
- **Employee Number:** The Employee number of the card holder
- **Phone Cell:** The Cell Phone Number of the card holder.
- **Car Registration:** The Registration Number of the Vehicle.
- **Location:** This is updated by the Software and displays the current location of the card according to the software.
- **Capture GRP:** This is the predefined capture group setting if the card status is set to capture, this will determine where the card will be captured. The setting in the CR351-5 setup is required.
- **Badge Sequence:** Used in a dual badge setup, determines the sequence for the dual badge.
  - **1<sup>st</sup> Badge:** This card must be badged first
  - **2<sup>nd</sup> Badge:** This card must be badged second
  - **Master:** This card does not require dual badge.
  - **Don't care:** The card can be badged whenever, still requires another card. If the other card is set for 1<sup>st</sup> badge then this card must be used second. If the other card is 2<sup>nd</sup> badge this card must be badged first. If the other card is set to don't care then either card can be badged first.

	Badge Sequence	Spare
0	1st Badge	
0	2nd Badge	
0	Don't Care	
0	Master	
0	Master	

- **Spare/2:** This field is a spare field where any information can be entered.
- **Allow Disabling:** If the CD Inactive is set in the **General Setup** this allows to set certain cards to not disable.
- **Output Group:** The cards Output group.

## b. Properties.

1. To view a more detailed card properties, right click on the card and select **properties**.



2. The card data dialog box will appear.

The 'Card Data' dialog box is shown with the 'General' tab selected. It contains the following sections and fields:

- Personal Details:** Title (None), Initials, Surname (zCard 001), First name(s), Nick Name, ID Number, Gender (None), Employee Number (zEmploy 001), Spare PD1, Spare PD2.
- Contact Numbers:** Home, Work, Cellular, Other.
- Address:** Address1, Address2, Suburb, City, Postal Code, Email.
- Business:** Company, Department (Department 0), Description, Job Task (zTask 0), Spare (zSpare 0), Spare 2, Spare 3, Union (Union 0). Includes an 'FP Search...' button.
- Vehicle Info:** Car1 Regis Number, Car2 Regis Number, Car3 Regis Number, Description1, Description2, Description3.
- Comment:** A text area for notes.

At the bottom, there are navigation controls for 'Record' (1 of 999) and 'XRef' (1 zCard 001), along with 'OK', 'Cancel', and 'Apply' buttons.

## i. General

- **Personal Details**
  - **Title:** Selected from a list.
  - **Surname:** Holders surname. This field is often used to enter the surname and first name.
  - **First Names:** The Card holder's First name.
  - **ID number:** ID number (or passport if no ID number).
  - **Gender:** Selected from a list.
  - **Employ number:** Company employment number. This is a unique number and cannot be duplicated. An error message will be given if you enter a duplicate number. The second number will not be accepted.
- **Contact Numbers**
  - **Home:** Telephone numbers.
  - **Work:** Telephone numbers.
  - **Cell:** Telephone numbers.
  - **Other:** Telephone numbers.
- **Address**
  - **Address 1:** Street name and house number or unit number.
  - **Address 2:** Complex name,
  - **Suburb:** Suburb where residence is located
  - **City:** City where residence is located
  - **Postal code:** Postal Code of residence. Normally defined by suburb by the postal office
  - **Email:** An Email address of the card holder.
- **Business**
  - **Company:** Generally used for contractors or visitors.
  - **Department:** Selected from a list.
  - **Description:** Work description.
- **Vehicle Info**
  - **Car registration 1,2,3:** Registrations of all vehicles that can be used to site, e.g. BCD123GP.
  - **Description 1,2,3:** Description of the vehicles, e.g. Silver Volkswagen Touran.
- **Comment:** Any information can be entered here. E.G: reason for disable, so on.



## ii. Status

The screenshot shows the 'Card Data' application window with the following sections:

- General Tab:**
  - Groups:** Control Card, Multi Group (?), Area Group (0), Exp AG Add (0), Exp AG Del (0), Absent AG Add (0), Absent AG Del (0), Count F AG Add (0), Count F AG Del (0), CD count AG (0), Capture Group (0), C Asset Group (0), Time Group (1), Trigger Group (0).
  - Counts:** Period (yyyy-mm-dd hh:mm), Last Date (yyyy-mm-dd hh:mm), Pcnt Now (0), Count Now (0), Pcnt Limit (0), Count Limit (0).
  - Locations:** Location (0), Time, Previous Location (0).
  - Master Card** and **Temp Card** dropdowns.
- Card Tab:**
  - Virtual Card Settings:** Virtual Card dropdown, Card 1, Card 2, Previous CD, Host, Visitor Ref, PIN Code, APB Reset (No), Passback (Not passback), Ext Access (0), Random %.
  - Disable Card when Inactive
  - Issued** and **Expires** date/time pickers.
  - Absent Start** and **Absent End** date/time pickers.
  - Status:** Enabled, Expire Status (Disabled), Absent Status (Disabled), Count F Status (Disabled).
- Footer:** Record navigation (1 of 999), XRef (1 zCard 001), and OK, Cancel, Apply buttons.

### • Groups

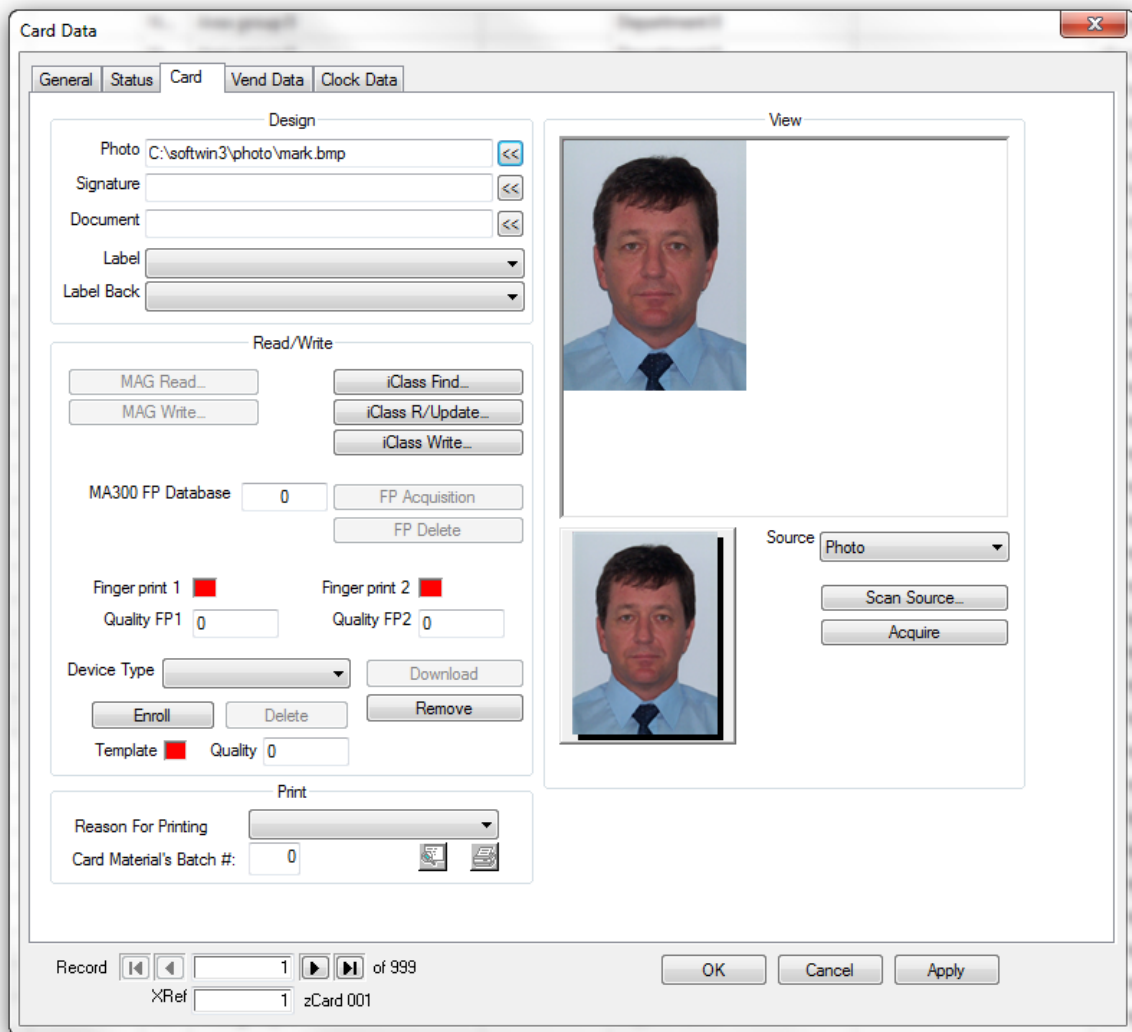
- **Control Card:** Also referred to as control group. Links the card to a control card – with data of all empty fields taken from the linked control card. For example: card 10 is linked to control card 100 – card 10's department and area group are set as empty, card 100 is set with department ABC and area group 123 – thus card 10 has department ABC and area group 123. A control card can be linked to another control card – the linking limit is set in general set-up (CD recursive). Note that the linking also stops when a card has been tested in the linking (e.g. card 10 linked to 100, 100 linked to 200, 200 linked to 100).
- **Mult Group:** Cards can belong to multiple groups, e.g. to the parking group, the admin group and the management, each giving access to certain area zones. If any of the allocated groups has access, access is permitted. Multi-groups are displayed according to the area group type – the area group type is set in the area group menu, new group types are set in the area group type menu. Group type 0 displays all groups.
- **Area Group:** Area groups define to which area zones the cardholder may be granted access to. Many cards may be allocated to the same group (e.g. "Area group - managers" with access to all zones) or the card can have its own unique group.

- **Exp AG Add:** Defines additional area zones the cardholder may be granted access to when the card expires.
- **Exp AG Del:** Defines area zones the cardholder may not be granted access to when the card expires.
- **Absent AG Add:** Defines additional area zones the cardholder may be granted access to when the card is set to be absent (on leave).
- **Absent AG Del:** Defines area zones the cardholder may not be granted access to when the card is set to be absent (on leave).
- **Count F AG Add:** Defines additional area zones the cardholder may be granted access to when the cards counters are full
- **Count F AG Del:** Defines area zones the cardholder may not be granted access to when the card expires.
- **CD Count AG:** A group can be allocated, and when the cardholder enters an area selected in the group (e.g. the canteen), the card counters are decremented.
- **Capture Group:** The card can be set to capture when entering specific areas. Set-up groups are set with the zones to which cards are captured and a capture group is set for the cards to be captured. Typically a group is set to capture at building exits, another at parking exit only.
- **C Asset Group:** When the asset management option is enabled, the asset group selects what assets can be reserved and issued by the cardholder.
- **Time Group:** TIME GROUP defines when a card may be granted access. One of 15 access time groups are selectable (with 8 time zones), e.g. "Time group 1 - managers" with 24 hour access.
- **Trigger Group:** A trigger group can be allocated that is used in triggered events (e.g. when entering an area, the group counter is incremented). This group is set in the Value element of a card event.
- **Settings**
  - **Virtual Card:** Cards set as virtual (yes) are not sent to controllers are used in triggers and as control or master cards. When used in triggers, all non-empty fields in the virtual card are compared with the card in the event – and if the same, the trigger is true (e.g. the virtual card only setting is department 10, and if any card in the event is set with department 10, the trigger is true).
  - **Card 1:** This number is the true number encoded in to, or on to the card or tag. This number is only used for readers set to random data, for other settings, the reference number is used as the card number. Readers are set to use cards 1 (e.g. MAG and PROX card).
  - **Card 2:** This number is the true number encoded in to, or on to the card or tag. This number is only used for readers set to random data, for other settings, the reference number is used as the card number. Readers are set to use cards 2 (e.g. MAG and PROX card).
  - **Issue 1:** Certain card types use issue numbers that typically follow the card number. The issue number can be read as part of the card and wrong issue cards are rejected. This requires a setting in set-up/general set-up/cards mask. The issue number can be set (also in cards mask menu) to auto increment when the card is programmed. Only used when using MAG type cards
  - **Issue 2:** Certain card types use issue numbers that typically follow the card number. The issue number can be read as part of the card and wrong issue cards are rejected. This requires a setting in set-up/general set-up/cards mask. The issue number can be set (also in cards mask menu) to auto increment when the card is programmed. Only used when using MAG type cards

- **Previous CD:** This number indicates the previous card number the cardholder used and is only used for documentation purposes and does not affect the functioning of the system.
- **Host:** A card number can be linked to a host card, only being allowed access via a reader which gives access to the area (or linked area) in which the host is in. The linked number is the reference number of the host, not the card number. This option is also referred to as Follow me.
- **Visitor Ref:** If the card is a visitor card, as entered by the visitor system, the last visitor reference (i.e. the visitor that last was allocated to use the card) is displayed. If a normal card, the reference is zero.
- **PIN Code:** A pin number can be allocated to cards when pin pads are installed. Depending on the set-up of the Pin Pad and reader time groups, access is via either card or pin code or both. Cards set with a pin code of zero, gains access only by card, no pin is required. Should more than one cardholder have the same pin code and access is only by pin (no card is swiped), the system reports access to the holder of the pin code first found in the database (starting at card 1). When cards and pin codes are used, the correct card is reported. A 9 in the last digit of the code is reserved for duress report, i.e. when a cardholder changed the last digit to 9, a duress alarm is generated (access is granted if the card normally has access).
- **APB Reset:** When checked, the card has a free APB movement, i.e. when attempting to gain access via an APB reader and the card has access but has an APB error, access will be granted.
- **Passback:** A card set as a passback card, overrides anti-passback, i.e. the card can be used for multi-access to the same area zone without the requirements to exit the zone (as is required for anti-passback). The required option is selected by clicking in the down arrow and clicking on the required option.**EXT Access:**
- **Random %:** When access is granted by a reader set with random search, the search % of the reader is overwritten by the % set for the card
- **Disable Card when Inactive:**
- **Issued:** This is the date and time the card was issued and serves as the enable time for the card. The card will not function before this date/time. The format is year-month-date hour: minute (e.g. 1986-12-30 11:50). Sets the issues to date/time of the PC and the expires time as defined in the expire mask in the General set-up menu
- **Expires:** The card expires on this date/time. The format is the same as above.
- **Absent Start/ End:** Absent is used for setting when a cardholder is on leave and access is restricted during this period. When the current data-time is within the absent start and end date/times (format is the same as above) the absent card status is used and area zones added / deleted as selected in absent add and delete groups.
- **Status:** Each card is set with a status of Disabled, Enabled or Capture. When the card has expired, the expired status is used and when the cards count is full, the count full status is used. Typically an expired card becomes capture
- **Expire Status:** The status of the card when expired, e.g. when the card is expired, it is a capture card, normally it is enabled.
- **Absent Status:** The status of the card while the card holder is absent/ on leave.
- **Count F Status:** The status of the card once the zone count has reached maximum.
- **Counts**
  - **Period:** Time period of the period counter, limiting the card to the count zone according to the period count limit.
  - **Last Date:** The last date the period counter started.
  - **Pcnt Limit:** The limit value of the period counter.
  - **Pcnt Now:** The now value of the period counter

- **Count Now:** The current overall count is displayed and is updated by the system when the card entered the count zone.
- **Count Limit:** The limit is the maximum number of times the card can enter the count zone.
- **Locations**
  - **Location:** The current location of the card
  - **Time:** The last date and time the card moved.
  - **Previous Location:** The previous location of the card, i.e. the previous area zone it was in before the last time the card was used.
- **Master Card:** Similar to control card, a card can be linked to a master card (master card link takes preference over a control card). Typically James has 3 cards (123, 234 and 345)– card 123 is the master card (all data filled in), card 234 is only set with card number (all other empty) and linked to master card 123, card 345 is set with card number, area group 10 and linked to master card 123). All other data for card 234 and 345 is taken from card 123.
- **Temp Card:** When linked to a temporary card, a card is effectively disabled. When a temporary card becomes disabled, the card linked as master card (to the temp card) and the link back from master to temp, is automatically deleted. This option is typically used when a cardholder forgets card at home and is issued a temporary card for the day. Link the temp card to the cardholder's card (temp card only fields not empty are card number and expire at day end or card is capture-expire), and link the cardholder's card to the temp card (cardholder's card is effectively disabled). When the temp card is captured or expired – the links are broken automatically and the cardholder's card functions normally.

### iii. Card



- **Design**
  - **Photo:** A photo can be linked to the card by entering the file name (with path). The photo is linked to the card by double clicking on the photo area, which opens a list box of photos in the photo database. Select the appropriate photo by scrolling the list. Photos are of any popular file types, e.g. .bmp, .jpg, etc. The photo file name can be edited or selected.
  - **Signature:** Similar to photo, a signature is read in as can be linked to the card by entering the file name (with path).
  - **Document:** Similar to photo, a document (e.g. ID document) is read in as can be linked to the card by entering the file name (with path).
  - **Label:** In order to print or program cards, a front label design must be selected.
  - **Label Back:** In order to print or program cards, a back label design must be selected.
- **Read/Write**
  - **MAG Read:** Reads the MAG track on the card using a MAG reader
  - **MAG Write:** Writes the card number and issue number to the MAG Track using programmer
  - **iClass Find:**\*\*\*\*\*
  - **iClass R/Update:**\*\*\*\*\*
  - **iClass Write:**\*\*\*\*\*

- **FP Acquisition:** Enrols a fingerprint onto the system saving the template into the databases.
- **FP Delete:** Deletes the fingerprint from the databases.
- **Fingerprint 1,2:** Green Fingerprint is enrolled, red no fingerprint.
- **Quality FP1/ FP2:** Fingerprint Score/quality
  - **0-165:** The person must be re-enrolled.
  - **166-175:** This is the bare minimum and only accepted if all fingers have been tested and expert enrolment assistance has been sought.
  - **176-185:** Acceptable, Fingerprint matching should be stable.
  - **186-215:** Good quality enrolment. Should match even with dirt or injuries.
  - **216-256:** Excellent quality.
- **Device Type:** \*\*\*\*\*
- **Download:** \*\*\*\*\*
- **Enrol:** \*\*\*\*\*
- **Delete:** \*\*\*\*\*
- **Remove:** \*\*\*\*\*
- **Template:** \*\*\*\*\*
- **Quality:** \*\*\*\*\*
- **Print**
  - **Reason For Printing:** The reason for printing the card.
  - **Card Materials Batch#:** Card Materials used EG Ribbon.
  - **Print Preview:** Preview the card before print
  - **Print:** Print card label
- **View:**
  - **Source:** Selects where the card Photo will be acquired.
    - **Photo:** The Photo exists and the user will browse to the image.
    - **Video:** A live image will display in the box above and the user will capture the image. This requires a capture source(webcam)
    - **Document:** The card holders ID Document will be scanned in using a Scanner attached to the PC
    - **Signature:** The card Holders signature
  - **Scan Source:** Opens a dialog box of each device that can be used to acquire the photo, Document, signature.
  - **Acquire:** Acquires the object selected in source using the device selected in scan source.

#### iv. Vend Data

- **Cost Group:** A card belongs to a cost group or none (Cost group 0). Cards that belong to a cost group, use the subsidies and value allocated to the group and does not use allocations to the card (only when not using a cost group). When cost group 0 is selected, the cards value is displayed in units (e.g. 45678 cents). When a cost group is selected, the cost groups value is displayed.
- **Discount Group:** A card can be linked to a discount group (when not selected to discount group 0), receiving discounts on items at certain machines (see discount group below).
- **Subsidy:** These values are used in conjunction with value if applicable the subsidy is used before the value or in conjunction with the value.
  - **Date:** Date displays the start of the last period the card was used for vending
  - **Period:** The period sets the interval after which the subsidy remaining is set with limit. When the card is used at a vending unit, and period plus date if before the current time/date, the limit is copied to remain. If remaining subsidy was negative (this could occur when the PC was off-line and vending occurred at a vender that is set to be able to free vend when off-line – the vend is reported to the PC when back on-line), the new subsidy is equal to limit less the remaining (negative) subsidy. If the remaining subsidy was positive (i.e. subsidy was not completely used), the new subsidy is equal to limit, i.e. the unused subsidy is lost.
  - **Limit:** Displays the subsidy available per period

- **Remain:** the subsidy remaining
- **Value:** the functions are similar to that of subsidy
- **Token:** The functions are similar to subsidy

v. **Clock Data**

The screenshot shows a software window titled "Card Data" with a "Clock Data" tab selected. The window is divided into two main sections: "Accumulation Totals" and "Clock Groups".

**Accumulation Totals:** This section contains five input fields, all of which are currently set to the value "0":

- Day: 0
- Week: 0
- Month: 0
- Hr/Week: 0
- Hr/Leave: 0

**Clock Groups:** This section contains two rows of controls:

- Clock In AG:** A text input field containing "0" followed by a dropdown menu showing "Setup group 0" and a red question mark icon.
- Clock Out AG:** A text input field containing "0" followed by a dropdown menu showing "Setup group 0" and a red question mark icon.

At the bottom of the window, there is a status bar with the following elements:

- Record navigation: Previous, First, 1, Last, Next buttons, followed by "of 999".
- XRef: "XRef 1 zCard 001".
- Action buttons: "OK", "Cancel", and "Apply".

- **Accumulation Totals**
  - **Day:** Cards current day accumulation total
  - **Week:** Cards current week accumulation total
  - **Month:** Cards current monthly accumulation total
  - **Hr/Week:** Minimum hours required for each week. Used for reports.
  - **Hr/Leave:** \*\*\*\*\*
- **Clock Groups**
  - **Clock In AG:** Selects where the card may clock in. EG: card 1 my clock in at area 123 and card 2 clocks in at area 1
  - **Clock Out AG:** Selects where the may clock out.