

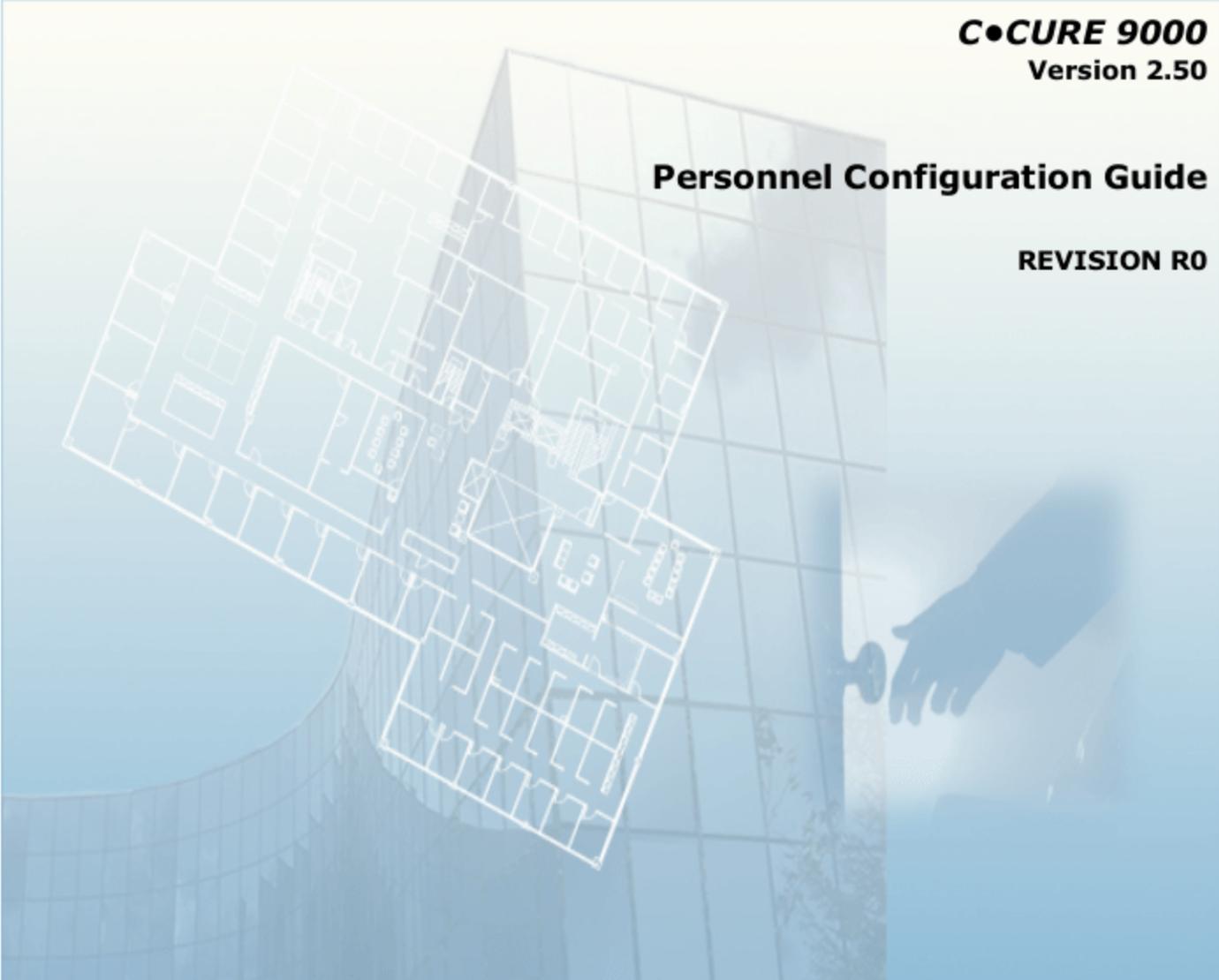
SOFTWARE HOUSE

From Tyco Security Products

C•CURE 9000
Version 2.50

Personnel Configuration Guide

REVISION R0



SOFTWARE HOUSE

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Preface

The *C•CURE 9000 Personnel Configuration Guide* is for new and experienced security system users who want to learn to use this product for the C•CURE 9000 Security Management System.

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How to Use this Manual

This manual contains chapters that provide the following information about C•CURE 9000 Personnel configuration.

Chapter 1: Personnel Overview

Provides introductory information about Personnel in C•CURE 9000.

Chapter 2: Personnel

Provides instructions for configuring C•CURE 9000 Personnel records.

Chapter 3: Personnel Type

Explains how to create and modify Personnel Types.

Chapter 4: Clearance

Describes how to create and modify Clearances.

Chapter 5: Credential

Explains how to view, assign, and remove Personnel Credentials.

Chapter 6: Custom Clearance

Explains how to view Custom Clearances as well as how to remove expired Custom Clearances.

Chapter 7: Images

Provides information about importing and using Image objects in C•CURE 9000.

Chapter 8: Badge Layout

Provides information about creating and adding Badge Layouts to Personnel.

Chapter 9: CHUID Format

Describes how to create and use CHUID Formats.

Chapter 10: Personnel Views

Explains how to create and use Personnel Views.

Finding More Information

You can access C•CURE 9000 manuals and online Help for more information about C•CURE 9000.

Manuals

C•CURE 9000 software manuals are available in Adobe PDF format on the C•CURE 9000 DVD.

You can access the manuals if you copy the appropriate PDF files from the C•CURE 9000 Installation DVD English\Manuals folder.

The available C•CURE 9000 and Software House manuals are listed in the *C•CURE 9000 Installation and Upgrade Guide*, and appear as hyperlinks in the online.pdf file on the C•CURE 9000 DVD English\Manuals folder.

These manuals are also available from the Software House Member Center website

([\[REDACTED\]](#)).

Online Help

You can access C•CURE 9000 Help by pressing F1 or clicking Help from the menu bar in the Administration/Monitoring Station applications.

These manuals are also available from the Software House Member Center website

([\[REDACTED\]](#)).

Conventions

This manual uses the following text formats and symbols.

Convention	Meaning
Bold	This font indicates screen elements, and also indicates when you should take a direct action in a procedure. Bold font describes one of the following items: <ul style="list-style-type: none"> • A command or character to type, or • A button or option on the screen to press, or • A key on the keyboard to press • A screen element or name
blue color text	Indicates a hyperlink to a URL, or a cross-reference to a figure, table, or section in this guide.
<i>Regular italic font</i>	Indicates a new term.
<text>	Indicates a variable.

The following items are used to indicate important information.

NOTE

Indicates a note. Notes call attention to any item of information that may be of special importance.

TIP

Indicates an alternate method of performing a task.



Indicates a caution. A caution contains information essential to avoid damage to the system. A caution can pertain to hardware or software.



Indicates a warning. A warning contains information that advises users that failure to avoid a specific action could result in physical harm to the user or to the hardware.



Indicates a danger. A danger contains information that users must know to avoid death or serious injury.

Software House Customer Support Center

Telephone Technical Support

During the period of the Agreement, the following guidelines apply:

- Software House accepts service calls **only** from employees of the Systems Integrator of Record for the installation associated with the support inquiry.

Before Calling

Ensure that you:

- Are the Dealer of record for this account.
- Are certified by Software House for this product.
- Have a valid license and current Software Support Agreement (SSA) for the system.
- Have your system serial number available.
- Have your certification number available.

Hours	Normal Support Hours	Monday through Friday, 8:00 [REDACTED] to 8:00 [REDACTED], EST. Except holidays.
	Emergency Support Hours	24 hours/day, seven days a week, 365 days/year. Requires Enhanced SSA "7 x 24" Standby Telephone Support (emergency) provided to Certified Technicians. For all other customers, billable on time and materials basis. Minimum charges apply – See MSRP.
Phone	For telephone support contact numbers for all regions, see [REDACTED]	

Personnel Overview

This chapter introduces the Personnel configuration components of the C•CURE 9000 Security and Event Management System. C•CURE 9000 Personnel provides the tools needed to configure Personnel records, user credentials, security clearances, badge layouts, images, and access card formats for your personnel.

In this chapter

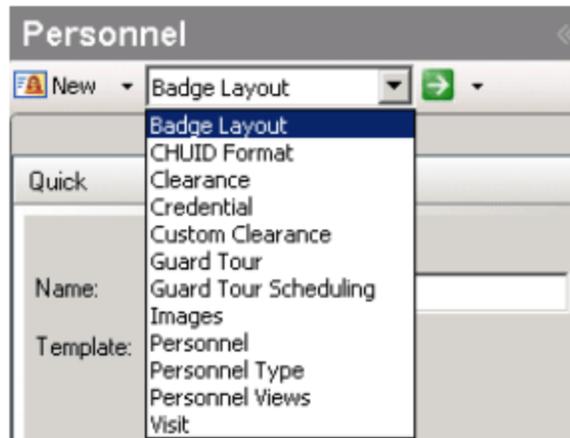
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Personnel Pane Overview

C•CURE 9000 Personnel gives you the ability to create Personnel records and define access credentials for your employees.

You can access Personnel by clicking the **Personnel** button. The Personnel pane opens and you can access existing Personnel records or create new ones. The Personnel pane is shown in [Figure 1 on Page 16](#).

Figure 1: The Personnel Pane



The Personnel pane allows you to access and define the following types of personnel related data from the drop-down list in the Personnel pane toolbar.

Table 1: Personnel Pane Selections

Selection	Meaning
Badge Layout	You can define the appearance and features of the access badges for your site using the C•CURE ID Badge Designer. See Badge Layout Editor on Page 162 for more information on the Badge Layout Editor.
CHUID Format	You can specify the Card Holder Unique ID (CHUID) used to uniquely identify each person's access credentials. See CHUID Format Overview on Page 168 for more information on the CHUID Format Editor.
Clearance	You can define the locations that each cardholder can access, and assign time schedules for that access. See Clearance Editor on Page 110 for more information on the Clearance Editor.
Credential	You can view a list of each individual access credential. See Credential Editor on Page 132 for more information on Credentials.
Custom Clearance	You can view a list of each individual Custom Clearance. ⁸ See Custom Clearance View on Page 152 for more information on Custom Clearances.
Guard Tour	You can use the Guard Tour Editor to define Guard Tours, a series of Stops where a Guard checks in during security rounds, for your site. See the <i>C•CURE 9000 Guard Tours Guide</i> for detailed information about Guard Tours. If your license does not include the Guard Tour option, this selection does not appear in the Personnel pane drop-down list.
Guard Tour Scheduling.	You can use the Guard Tour Scheduling Editor to configure schedules by which individual Guards are expected to run their assigned Guard Tours. See the <i>C•CURE 9000 Guard Tours Guide</i> for detailed information about Guard Tours. If your license does not include the Guard Tour option, this selection does not appear in the Personnel pane drop-down list.

Personnel Pane Selections (continued)

Selection	Meaning
Images	You can import images from picture files saved on your system or network into the C•CURE 9000 database to use for portraits, signature, badge logos, and backgrounds. You can also view a list of all images stored in the database. See Images Editor on Page 156 for more information on Images.
Personnel	You can use the Personnel Editor Views to create individual records for each of the people who can access your site, including their access credentials and their clearances (the doors and locations they are allowed to access). See Personnel Editor on Page 37 for more information about the Personnel Editor.
Personnel Type	You can use the Personnel Type Editor to define terms that identify the type of personnel at your site. Employee and Contractor are provided, but you can define additional personnel types, such as guard, visitor, escort, or whatever terms are appropriate for you. These Personnel Types are mainly for customer use to accurately describe Personnel. However, you can also use the Personnel Type Editor to configure an inactivity period for each defined Personnel Type. This allows the system to disable any Credentials belonging to Personnel with the specified types after a period with no system activity. See Personnel Type Overview on Page 100 for more information on Personnel Types, and for more information about 'Disabling for Inactivity'.
Personnel Views	Personnel Views let you customize the editing of Personnel records in C•CURE 9000. You can use the two default Personnel Views provided with C•CURE 9000, or you can create Personnel Views to display more or fewer fields, and add or remove tabs from a view, and assign those views to Operator Privileges so that your Operators editing and viewing Personnel only have access to the fields that they need. See Personnel Views Editor on Page 182 for more information on Personnel Views.
Visits	Visits lets you create Visitor Management objects if your license includes the Visitor Management option. For more information about Visitor Management, see the <i>C•CURE 9000 Visitor Management Guide</i> . If your license does not include the Visitor Management option, this selection does not appear in the Personnel pane drop-down list.

Card Formats

You can define and customize the arrangement of data used by your Personnel access badges and your card readers. The Card Format Editor is accessed from the **Card Formats and Keys** pane in the C•CURE 9000 Administration Client. See the *C•CURE 9000 Card Formats and Keys Guide* for more information on the Card Format Editor.

Personnel Object Tasks

Many of the tasks you can perform on Personnel objects use the same general procedures. The methods for creating, editing, viewing a list of objects, exporting, and other functions are similar across most Personnel objects.

- [Creating an Object on Page 18](#)
- [Creating an Object Template on Page 18](#)
- [Creating an Object from a Template on Page 19](#)
- [Editing an Object on Page 20](#)
- [Viewing a List of an Object Type on Page 20](#)
- [Using the Object List Context Menu on Page 23](#)
- [Exporting an Object on Page 24](#)
- [Deleting an Object on Page 25](#)

Creating an Object

You can create an object from the Personnel pane using the Personnel pane drop-down list and the new button for the object type.

To Create an Object from the Personnel Pane

1. In the **Navigation** Pane of the Administration Workstation, click **Personnel** to open the Personnel pane.
2. Select the object type you want to create (for example, **Personnel**) from the drop-down list in the Personnel Pane.
3. Click **New** to create a new object of the type you selected. The object type's editor opens, and you can configure the object.
4. To save your new object, click **Save and Close**.

- or -

Alternatively, if you want to save the object and then create a new one, click **Save and New**. The current object is saved and closed, but the object editor remains open to allow you to create a new object.

NOTE

On the Personnel Editor, you can click **Save** if you want to save the Personnel record and continue editing it without closing the editor.

Creating an Object Template

You can create a object template for most object types. You can use the template as the basis of new object records by saving the settings you want your objects to have in common. In a template, you can fill in field values with the same values for all records, and then use the template when you are creating new records. (This is subject to the settings that C•CURE 9000 allows you to save in a template for that object type.)

The Templates you create are listed alphabetically in the drop-down list of the **New** button in the Personnel pane, as in the example below for Clearances.

**Example:**

You could create a template for all personnel with a Personnel Type of Employee, with the same set of Clearances. Whenever you are creating a new Employee Personnel record, you can save time by creating the new record from the template instead of the default blank form.

To Create a Object Template

1. In the **Navigation** Pane of the Administration Workstation, click **Personnel** to open the Personnel pane.
2. Select the object type you want to create (for example, **Personnel**) from the drop-down list in the Personnel Pane.
3. Click the down-arrow on the **New** button and click on **Template** to create a new object template. The Object's editor opens, and you can configure the object.
4. Any fields that you configure values for become part of the template (subject to the settings that C•CURE 9000 allows you to save in a template for that object type). When you subsequently create a new object of this type from that template, these field values are already filled in.
5. To save your new object template, click **Save and Close**.

NOTE

On the Personnel Editor, you can click **Save** if you want to save the Personnel template and continue editing it without closing the editor.

Creating an Object from a Template

You can create a new object from a Template that you have previously saved. The new object created from the template contains the same settings, fields, and tabs as the template.

To Create an Object from a Template

1. In the **Navigation** Pane of the Administration Workstation, click **Personnel** to open the Personnel pane.
2. Select the object type you want to create (for example, **Personnel Views**) from the drop-down list in the Personnel Pane.
3. Click the down-arrow on **New** and select a template from the templates listed under *---Templates*.



4. The object's Editor opens, and you can configure the object.
5. Type a name for the object in the **Name** field (the **Name** must be unique).
6. To save your new object, click **Save and Close**.

Editing an Object

Most objects in the Personnel pane have an editor that is used to configure the objects of that type. Credential is the exception - Credentials (which are contained in a Personnel record) are created using the Personnel editor.

To Edit an Object

1. Display a Dynamic View list of the object you wish to edit (see [Viewing a List of an Object Type on Page 20](#)).
2. Click the object you wish to modify to select it.
3. Right-click the selected object and choose **Edit** from the context menu.
4. The object's Editor opens and you can change any of the settings for the object.
5. To save your modified object, click **Save and Close**.

NOTE

On the Personnel Editor, you can click **Save** if you want to save the Personnel record and continue editing it without closing the editor.

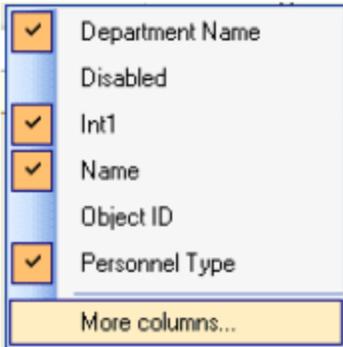
Viewing a List of an Object Type

You can view a list of all objects of a specific type by opening the default Dynamic View for the object type.

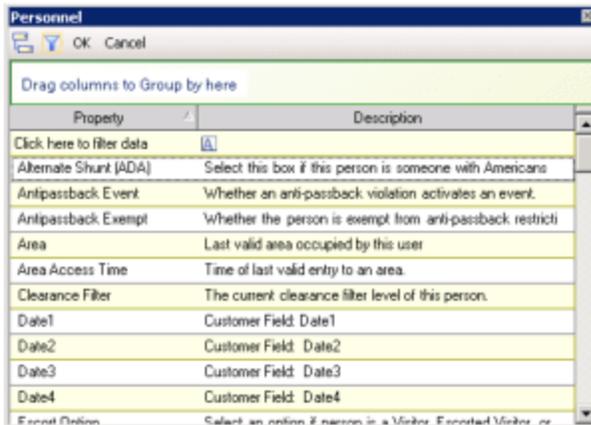
To View a List of an Object Type

1. In the **Navigation** Pane of the Administration Workstation, click **Personnel** to open the Personnel pane.
2. Select the object type you wish to view in a list (for example, select **Personnel** from the Personnel pane drop-down list).
3. Click  to open a Dynamic View listing all the objects of this type. (You can also click the down-arrow of this button to either view the list in the current tabbed view or open a new tabbed view).
4. You can sort, filter, and group items in the list using the Dynamic View icons. See [Sorting and Filtering the List of Objects on Page 21](#).
5. You can right-click an object in the list to open the context menu (see [Deleting an Object on Page 25](#)) and perform any of the functions on that menu.

- You can right-click on a column heading (such as **Name**) in the view to display a context menu that lets you change the columns displayed by the Dynamic View.



- Click on the name of a column to add it to the view.
- Click on a column that is currently displayed in the view (marked with) to remove that column from the view.
- Click on **More Columns** to choose additional columns to display, if there are additional columns that are not displayed. Select one or more columns from the dialog box that appears, using **CTRL+Left-click**, or a range of columns using **SHIFT+Left-click**, then click **OK** to display the additional columns.



Columns that you add or remove from a Dynamic View in this manner are only in effect until you close the Dynamic View. If you want additional columns to appear each time you open the view, you must edit and save changes to that specific dynamic view.

NOTE If you add new records to the database while you have a Dynamic View open, or delete existing records, the Dynamic view automatically updates to add or remove these records. You can also click  to refresh the list manually.

Sorting and Filtering the List of Objects

Once you have displayed the list of Objects Dynamic View, you can sort and filter this list using the Dynamic View toolbar.

Filtering the List of Objects

You can filter the list of Objects to display only the Objects that match the criteria you specify. You can filter the list by any field that is displayed on the Dynamic View.

To Filter the List of Objects

1. From the **Objects Dynamic View**, click  on the Dynamic View toolbar to enable filtering. A filter row appears in the Dynamic view.
2. Click in any column in the filter row to filter the data in the list. You can type in a value, or choose a value from the drop-down list (click the  that appears when you click in the column).
3. Click the filter button  to choose a filter criteria (such as “Begins with” or “Contains”) from a drop-down list. The filter button changes to reflect the choice you made.
4. You can turn off all filtering criteria by clicking  to the left of all columns, or you can click the same icon in a column you have selected to clear data in that column only.

Sorting the List of Objects

You can sort the list by any field that is displayed on the Dynamic View.

To Sort the List of Objects

1. From the **Objects Dynamic View**, click a column heading (such as “Name”) to sort the list of Objects by the data in that column.
2. You can toggle the sort from ascending to descending and back by continuing to click on the column head.
3. You can display additional columns by right-clicking a column heading and clicking on a column in the list of columns. Columns shown in the list with a check mark are already selected for display.

Printing a List of Objects

You can print the Objects Dynamic View as a report listing all or some of the Objects on your system. You can filter and sort the list before sending it print.

To Print the List of Objects

1. From the Objects View, sort and filter the list so the records you want to print are displayed in the desired order. You can also change the width of the data columns by clicking the column margin and dragging to make it wider or narrower.
2. Click  to open a **Windows Print** dialog box. You can set the paper size, source, orientation, and margins from this box. You can also click the **Printer** button to select a different printer.
3. Click **OK** and a **Print Preview** dialog box appears. You can use the toolbar to zoom the preview, change the arrangement of displayed pages, navigate to any page of the list, and send the list to print.
4. Click the **Print** button  to send the Objects list to print.

Using the Object List Context Menu

The context menu that opens when you right-click on one or more objects in the Dynamic View includes some standard selections and often contains additional selections that are specific to the object type. (See [Figure 2](#) on [Page 23](#) for an example, showing the Personnel context menu).

You can select one or more object in the Dynamic View (using multiple selection combinations such as **SHIFT+Left-click** and **CTRL+Left-click**) and perform functions such as Set property, Add to group, Export selection, and Find in Journal using the context menu. See [Table 2](#) on [Page 23](#) for definitions of the standard context menu selections.

Figure 2: Personnel List Context Menu

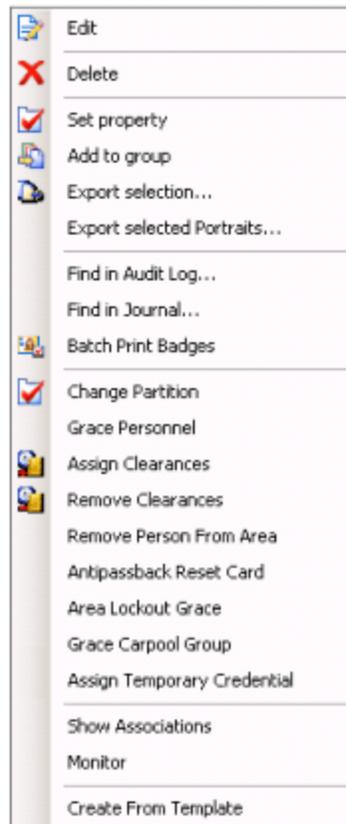


Table 2: Object List Context Menu

Selection	Description
Edit	Click this menu selection to edit the object. The object’s editor opens. You can rename the record, change its Description , and the objects and fields to include in it.
Delete	Click this menu selection to delete the selected object. A prompt appears asking you to confirm that you want to delete the object. Click Yes to delete the object or No to cancel the deletion.

Object List Context Menu (continued)

Selection	Description
Set Property	<p>Click this menu selection to change the Property value of a field in all the selected objects. For example, you could select multiple Personnel and change their Personnel Type to "Employee".</p> <p>A dialog box appears asking you to select a property to change. Click  to open a selection list and click the property you wish to change. You can then change the value of this property by changing the Value field.</p>
Add to Group	You can add one or more selected objects to a Group of that object type. When you click this menu choice, a dialog box appears for you to select the Group to which to add the object. When you click a Group of the Object type in the list, the selected object is added to the Group.
Export Selection	Click this menu selection to Open an Export...to XML or CSV file dialog box to export one or more of the selected objects to either an XML or a CSV file. This allows you to quickly and easily create XML/CSV reports on the selected data. See Exporting an Object on Page 24 for more information.
Find in Audit Log	Opens a Query Parameters dialog box in which you can enter prompts and/or modify the query criteria to search for entries in the Audit Log that reference the selected object. When found, the results display in a separate Dynamic View (see the <i>C•CURE 9000 Data Views Guide</i>).
Find in Journal	Opens a Query Parameters dialog box in which you can enter prompts and/or modify the query criteria to search for entries in the Journal that reference the selected object. When found the results display in a separate Dynamic View (see the <i>C•CURE 9000 Data Views Guide</i>).
Change Partition	This selection is available if your system is partitioned. Click to open a dialog box that allows you to change the Partition to which the object belongs. For more information see the chapter on Partitions in the <i>C•CURE 9000 Software Configuration Guide</i> .
Show Association	This menu selection is available only for the following object types on the Personnel Pane: Badge Layouts, CHUID Formats, Clearances, Personnel, and Personnel Types. Click to open a dialog box that lists Security Objects associated with the object in the Dynamic View. For more information, see "Showing Associations for an Object" in the <i>C•CURE 9000 Getting Started Guide</i> .
Monitor	<p>This menu selection is available only for the Personnel object type on the Personnel Pane. Click this menu selection to view Door swipe activity on an Admin Monitor Activity Viewer for the selected Personnel.</p> <p>For more information, see "Monitoring an Object from the Administration Station" in the <i>C•CURE 9000 Getting Started Guide</i>.</p>
Create from Template	<p>Click to create a new Personnel record from a Personnel Template.</p> <p>This menu selection is available only when you right-click on a Personnel Template.</p> <p>This is useful if you have a large number of Personnel Templates - you can use the Search fields (Name, Personnel Type, etc.) to narrow the list of Personnel records displayed in the Dynamic View so that you can more easily choose the Personnel Template from which to create a new Personnel record.</p>

Exporting an Object

From a Dynamic View of an object, you can export an object as an .XML file or a .CSV file.

NOTE

Although XML is the initial default file type, once you choose a type in the **Save as type** field, whether XML or CSV, that becomes the default the next time this dialog box opens.

- When you export to an XML file, all available data for the selected object(s), whether displayed in the Dynamic View or not—as well as all the child objects of the selected record(s), is exported.
- When you export to a CSV file, you can view the exported data in an Excel spreadsheet and further manipulate it for your use. Only data in the columns displaying in the Dynamic View is exported, and in the order displayed. This allows you to both select and arrange data fields for your report.

NOTE

CSV-formatted exports **cannot** be imported into C•CURE 9000. If you require importing functionality (such as importing an object into a different C•CURE 9000 server, export to XML).

When you click **Export Selection**, you are running the export on the client computer. Consequently, the system does not use the Default Export Directory Path—which is on the server. It opens a directory on the client, reverting to the last directory used. You can navigate to the default export server directory, if you wish. Or to avoid confusion or use the same destination folder for both client and server computers, you can use UNC (Universal Naming Convention) paths.

Example:

```
\\ComputerName\Program Files\Software House\SWHSystem\Export
```

For more information, see the Dynamic Views chapter in the *C•CURE 9000 Data Views Guide*.

To Export an Object to an XML or CSV File

1. Open a Dynamic View of the object type (see [Viewing a List of an Object Type on Page 20](#)).
2. Select one or more objects from the list, then right-click.
3. Select **Export Selection** from the context menu. A Windows file selection dialog opens to allow you to export the object(s).
4. Navigate to the folder where you want to save the exported objects.
5. Choose the type of export from the drop-down list in the **Save as type** field (either Export as XML file or Export as CSV file).
6. Type a file name in the **File name** field, or click on a file in the folder (that file will be overwritten by the export) and click **Save** to export the object.

Deleting an Object

You can delete an object from C•CURE 9000 if it is no longer needed.

To Delete an Object

1. Display a Dynamic View list of the object (see [Viewing a List of an Object Type on Page 20](#)).
2. Select the object you wish to delete.
3. Right-click the selected object and choose **Delete** from the context menu.
4. A dialog box appears to confirm that you want to delete the object. Click **No** to cancel the deletion, or click **Yes** to delete the object. A dialog box appears to show the progress of the deletion.
5. Click **OK** to complete the deletion.

Disabling Credentials for Inactivity Overview

The *Disabling by Inactivity* capability allows you to configure your C•CURE 9000 system to automatically disable Personnel Credentials that have not been used for a specified period of time.

NOTE Only Card Admits are considered 'card activity' by the Disabling for Inactivity service. Card Rejects do not count.

In addition, the system provides reports that can tell you the following:

- Which Credentials **will be** expired on a certain date.
- Which Credentials **were** expired on a certain date.
- Which Credentials **should have been** expired, but **were not**.

For information on how the Disabling by Inactivity process works with MAS and SAS servers, see [Disabling Credentials for Inactivity in an Enterprise Environment](#) on Page 27.

To Set Up Disabling by Inactivity for Your System

1. Configure two System Variables in the **Personnel** category, **Disable by Inactivity Enabled** and **Disable by Inactivity Scan Time**. For information about editing these System Variables, see:
 - [Configuring the Disable by Inactivity Process for Personnel Credentials](#) on Page 44
 - the Personnel Category in the *C•CURE 9000 System Maintenance Guide*
2. Configure Inactivity Periods for the Personnel Types you have defined for your site. For information, see [Personnel Type Overview](#) on Page 100 and [Configuring the Disable by Inactivity Process for Personnel Credentials](#) on Page 44.
3. Assign the desired Personnel Types to Personnel Records. For information, see [Setting the Personnel Type](#) on Page 49.

You can review the status of Credentials—related to Inactivity Disabling—in several different ways:

- For an individual Personnel Record – on the **Personnel Editor Credential** tab. For information, see [Personnel Credentials Tab](#) on Page 54.

NOTE A credential whose status is:

- **Lost, Stolen, Disabled, or Expired** is excluded from being disabled by the inactivity process.
- **Disabled by Inactivity** will also have the **Disabled** status set.

- For a list of Credentials in the system – on the Credential Dynamic View. For information, see [Credential Editor](#) on Page 132
- For a list of Credentials in the system – By running any one of three pre-defined Reports:
 - SWH62 - Credentials that Should be Disabled by Inactivity Report
 - SWH63 - Credentials that have been Disabled by Inactivity Report
 - SWH64 - Credentials that should be Disabled by Inactivity but Were Not Report

For information, see Appendix A in the *C•CURE 9000 Data Views Guide* .

Disabling Credentials for Inactivity in an Enterprise Environment

In an Enterprise Environment, the two **Personnel** category System Variables, **Disable by Inactivity Enabled** and **Disable by Inactivity Scan Time** must be configured appropriately on each individual server since Credentials are expired on their own server.

A Global Personnel's Credentials are expired by the MAS server using information propagated from each SAS server. Software House assumes that the MAS and all its SASes are synchronizing normally on a regular basis. Delays in synchronization can cause inaccurate expirations, as well as inaccurate data on any of the Inactivity Reports.

Personnel

The C•CURE 9000 Personnel Editor is used to create Personnel records for the people who need access to your site.

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Searching for Personnel

You can search for Personnel using the Search functions on the Personnel pane. You can perform a Quick Search using the Personnel Name fields, or you can perform an Advanced search by defining a Query using the Query Editor. Searches are activated by clicking the Search button (🔍).

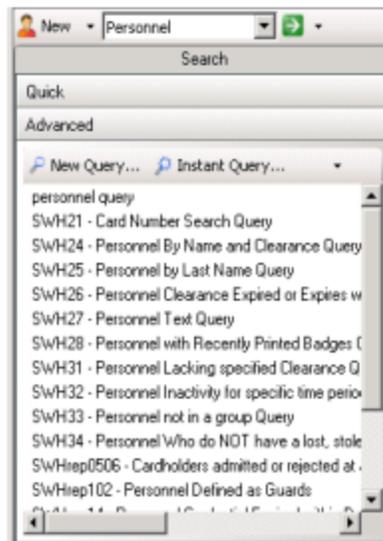
- To show a list of all Personnel, click 🔍 without entering any data in the Quick or Advanced Search panes.
- To Quick Search for Personnel, type your search information in the Quick Search pane and click 🔍. See [Performing a Personnel Quick Search on Page 30](#) for more information.
- To perform an Instant Query, click Advanced to show the Advanced pane, then click **Instant Query**. See [Running an Instant Query on Page 31](#) for more information.
- To perform an Advanced search, click **Advanced** to show the Advanced pane, then select a Personnel Query from the list and click 🔍, as shown in [Figure 3 on Page 30](#).

See [Defining a Personnel Advanced Search \(Query\) on Page 33](#) for more information.

NOTE

The list includes the pre-defined Queries related to Personnel that come with the system. (See Appendix A in the *C•CURE 9000 Data Views Guide* for more information.) The list also includes any Queries already defined by an Operator.

Figure 3: Advanced Search Pane



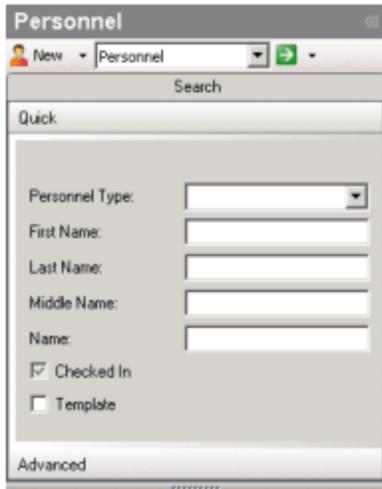
- To search for Credentials for Personnel based on certain conditions, see [Searching for Credentials for Personnel on Page 36](#).
- If you have defined a default Dynamic View for Personnel that includes a Query, click 🔍 to display that view, showing Personnel that meet the criteria in the Query. See the Chapter on Dynamic Views in the *C•CURE 9000 Data Views Guide* for more information about default views.

Performing a Personnel Quick Search

To Perform a Personnel Quick Search

1. Click the **Personnel** pane button.

- The Personnel pane opens with Quick Search visible.



- Click the drop-down list in the Personnel pane toolbar and select **Personnel**.
- If you wish to search for a specific Personnel Type, select from the **Personnel Type** drop-down.
- Type the personnel name information you wish to search for in the Quick Search fields (**FirstName**, **LastName**, **MiddleName**, or **Name**). You can type a full name or a partial name (search for a name that “starts with” the letters you type).

Example:

If you type “Smi” in **Name** you would find “Smith”.

The **Name** field can be used to find combinations of last, first, and middle names.

- If you wish to search for a Checked In Visitor, select the **Checked In** field (click until a check mark appears).
- If you wish to search for a personnel template file rather than a person record, select the **Template** field (click until a check mark appears).

NOTE

The check mark field has three states:

- **Blank** means "search for records where this criteria is NOT True."
- **Checked** means "search for records where this criteria IS True".
- **Dimmed** means "do not use this criteria in the search".

- Click  to open a Dynamic View showing the Personnel objects that match the information you entered.

Running an Instant Query

An Instant Query is useful when you need to find information in C•CURE 9000, but you do not want to create a new Query and save it. Instant Query is useful for a one-time look up of objects that are not available with a Quick Search.

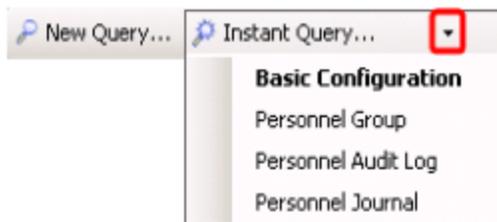
For example, the Quick Search for Personnel lets you look for Name-related data. It does not let you search for Card Numbers, Personnel Type, Credentials, and most other Personnel data.

An Instant Query lets you look for any Personnel-related data by defining your search terms on the fly and running it. An Instant Query is configured the same way as an Advanced Search (Query). Unlike an Advanced Search (Query), you cannot save the Instant Query search you define.

If you expect to repeat the search at a later time, you should define it and save it as an Advanced Search (Query). See [Defining a Personnel Advanced Search \(Query\)](#) on [Page 33](#) for more information.

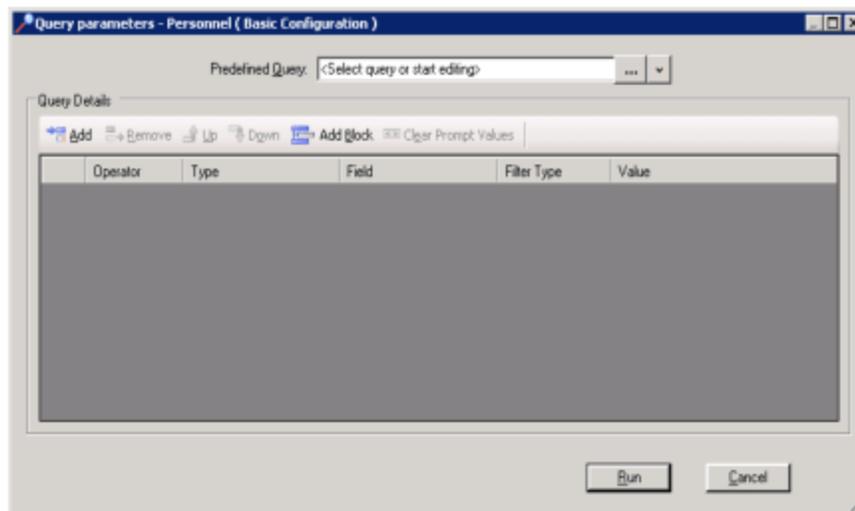
To Run an Instant Query

1. Click the **Personnel** pane button.
The Personnel pane opens with Quick Search visible.
2. Click the drop-down list in the Personnel pane toolbar and select **Personnel**.
3. Click **Advanced**.
4. Click **Instant Query** to define a basic Instant Query, or click the down arrow to show the available Instant Query types. Click on one of these choices to open the Query Parameters dialog box for that query type.



The Query Parameter dialog box for the Instant Query you have chosen opens.

Figure 4: Query Parameter Dialog Box



5. You can click **...** in the Predefined Query field to select a previously saved Personnel query, make changes to the query in the Query Details table, and click **Run** to run the query.

Alternatively, you can click **Add** to add query statements to the Query Details table, and click **Run** to run this query.

- The results of the query are displayed as a Dynamic View in the C•CURE 9000 Administration Workstation Content area.

For more information on the details of defining and running an Instant Query, see the chapter on Queries in the *C•CURE 9000 Data Views Guide*, and the online Help for Instant Query (click **F1** to display the online Help).

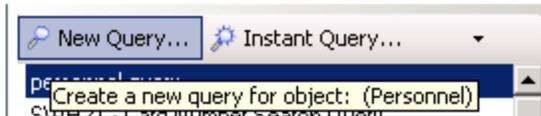
Defining a Personnel Advanced Search (Query)

If you expect to perform a particular search multiple times, you should define and save an advanced search (Query). You create a Query using the Query Editor. You can create a Query to search for any C•CURE 9000 object, but in this case the focus is on creating a Query to search for Personnel objects.

You define an advanced search by creating rows in the Query Criteria table that specify what you want to search for. If you define multiple rows, you specify how each row is related to the other rows (AND/OR logical operator).

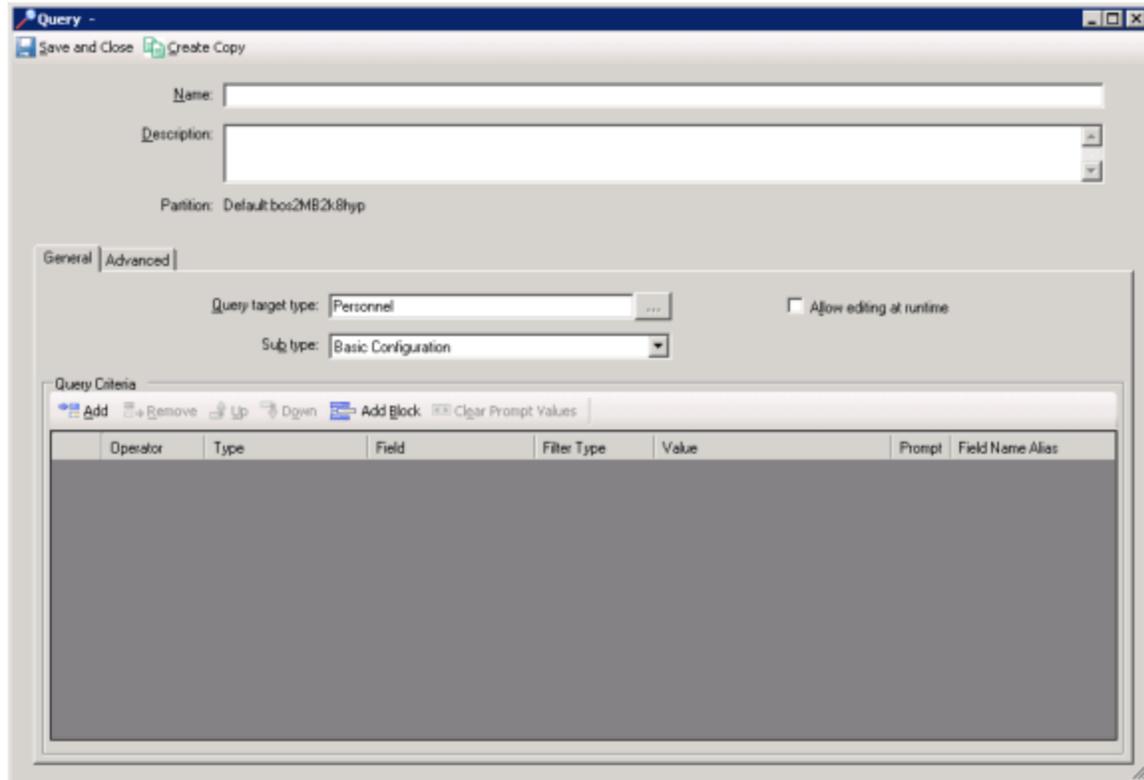
To Define a Personnel Query

- Click the **Personnel** pane button.
- The Personnel pane opens with Quick Search visible.
- Click the drop-down list in the Personnel pane toolbar and select **Personnel**.
- Click **Advanced**.
- Click **New Query** to open the Query Editor (see [Figure 5 on Page 34](#)) to create a new advanced search.



- Type a name for your Personnel Query in the **Name** field.

Figure 5: Query Editor



7. Type a description for your Personnel Query in the **Description** field. A description should give enough information so that an Operator who is unfamiliar with your queries can tell what the query is searching for.
8. To begin defining the search criteria for the query, click **Add**. A new row appears in the **Query Criteria** table.
9. Choose the kind of object you want to search for from the drop-down list in the **Object Type** Column. To search for persons, choose **Personnel**.
10. Choose a field to search on from the drop-down list in the **Field** column.

Example:

To search on Last Names, pick **LastName**

11. Choose a filter type from the drop-down list in the **Filter Type** column.

Example:

If you intend to search for Last Names that begin with the letters "Bro" choose **Starts With** for the filter type.

12. In the **Value** column, type the value that you want to search for.

Example:

If you intend to search for Last Names that begin with the letters "Bro" type in "Bro" (without the quotes).

13. For each row, you can specify whether or not you want to give the Operator running the Query the ability to change the search criteria. If you select **Prompt**, when an Operator runs the search, a dialog box appears to allow them to modify each row that has **Prompt** enabled.

Example:

If you enable Prompt for a row that searches for LastNames starting with “Bro”, the Operator can choose a different value from the dialog that appears.

14. You can also add grouped search expressions by clicking **Add Group**.

Example:

If you want to search for Personnel who have an Employee Type of **Contractor** and a value of **0** in the **Logical1** field, and from that group, find those people with Operator privileges, you could add a group to a search for Operators that added a search criteria for both Employee Type and Logical1.

15. To save the Query, click **Save and Close**.

Searching for Credentials for Personnel

You can define a Query on the Query Editor that searches for Credentials based on some attribute of the Card's Personnel record and/or the Personnel Child records. Once you have a list of these Credentials on a Dynamic View, you can use **Set Property** from the right-click Context Menu to edit these Credentials in bulk.

Example:

Suppose you want to find the Credentials for all the Personnel in your database who are Contractors so you can change the dates when their Credentials will expire. Adapting the procedure described in [Defining a Personnel Advanced Search \(Query\)](#) on [Page 33](#), create a Query with the parameters shown in the following table. (If you expect to repeat the search at a later time, you should save it as an Advanced Search [Query].)

Query Target Type: Credential				
Operator	Type	Field	Filter Type	Value
In	Personnel	PersonnelType	Equals	Contractor

The query returns a Dynamic View list of the Credentials for all Personnel who have "Contractor" as their Personnel Type. You could then select all or some of the Contractors and use the Set Property option from the right-click context menu to set an Expiration Date for their Credentials.

NOTE

You could also use Credential as the target type in a Query to retrieve a list of Credentials with access to (Clearances for) a particular Door.

For more detailed information on configuring and using Queries see the Query chapter in the *C•CURE 9000 Data Views Guide*.

Personnel Editor

A C•CURE 9000 Personnel record is used to store information about people who can access your site, including their access credentials and their clearances (the doors and locations they are allowed to access). The Personnel Editor is used to enter information about each person.

The following sections provide more information about using Personnel to define Personnel records.

- [Personnel Editor Tabs](#) on [Page 37](#)
- [Personnel Tasks](#) on [Page 37](#)

Personnel Editor Tabs

The Personnel Editor stores personnel information on several tabbed views. The following sections give more information about each Personnel tab and how to use it.

- [Personnel General Tab](#) on [Page 46](#).
- [Personnel Credentials Tab](#) on [Page 54](#).
- [Personnel Clearances Tab](#) on [Page 64](#).
- [Personnel Customer Tab](#) on [Page 67](#).
- [Personnel Customer Extended Tab](#) on [Page 69](#).
- [Personnel Images Tab](#) on [Page 71](#).
- [Personnel Badging Tab](#) on [Page 77](#).
- [Personnel Previous Doors Tab](#) on [Page 81](#).
- [Personnel User-defined Fields Tab](#) on [Page 83](#).
- [Personnel Custom Clearance Tab](#) on [Page 84](#)
- [Personnel Documents Tab](#) on [Page 91](#)
- [Personnel Personnel Triggers Tab](#) on [Page 96](#)

Personnel Tasks

You can perform the following tasks with the Personnel Editor to configure Personnel records.

- [Personnel Object Tasks](#) on [Page 18](#)
- [Accessing the Personnel Editor](#) on [Page 38](#).
- [Selecting a Personnel View](#) on [Page 39](#).
- [Searching for Personnel](#) on [Page 30](#).
- [Using the Personnel List Context Menu](#) on [Page 39](#) to set properties of one or more personnel objects, add personnel to groups, export personnel records and Image, batch print badges, and other functions.
- [Exporting Personnel Portraits](#) on [Page 42](#)
- [Configuring the Disable by Inactivity Process for Personnel Credentials](#) on [Page 44](#)

Accessing the Personnel Editor

You can access the Personnel Editor from the C•CURE 9000 Personnel pane.

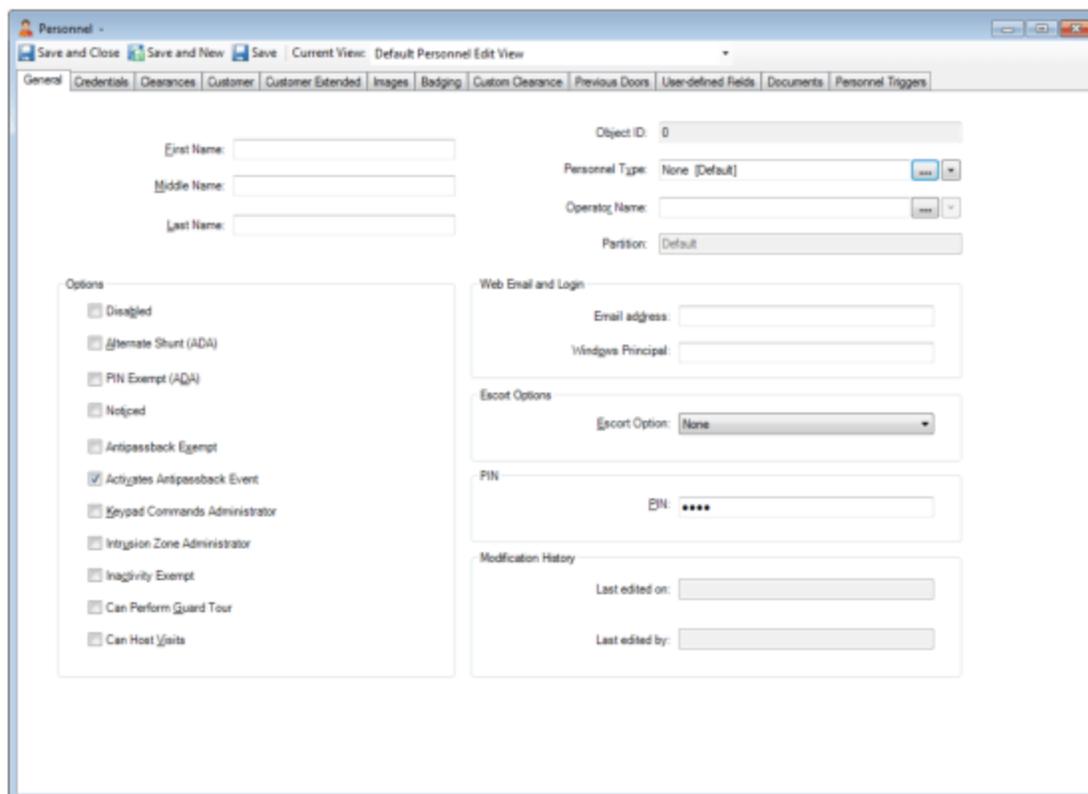
To Access the Personnel Editor

1. Click the **Personnel** pane button in the Administration Station.
2. Select **Personnel** from the drop-down list in the Personnel pane toolbar.
3. Click  to open a Dynamic View showing all Personnel objects.
4. Double-click the name of the Person in the list that you want to edit (or right-click to display the context menu, then click **Edit**), and the Personnel Editor opens (see [Figure 6](#) on [Page 38](#)).

NOTE

The figures in this chapter show the Personnel Editor Default Personnel Edit View. Because an Administrator can change the content of a Personnel View, adding or removing tabs and fields, as well as adding User Defined Fields, the Personnel Views you see may not look exactly like the figures in this document. See [Default Personnel Views](#) on [Page 182](#) for more information.

Figure 6: Personnel Editor



The screenshot shows the Personnel Editor window with the following fields and sections:

- General Tab:**
 - First Name:
 - Middle Name:
 - Last Name:
 - Object ID:
 - Personnel Type: (dropdown)
 - Operator Name: (dropdown)
 - Partition:
- Options:**
 - Disabled
 - Alternate Shunt (ADA)
 - PIN Exempt (ADA)
 - Noticed
 - Antipassback Exempt
 - Activates Antipassback Event
 - Keypad Commands Administrator
 - Intrusion Zone Administrator
 - Inactivity Exempt
 - Can Perform Guard Tour
 - Can Host Visits
- Web Email and Login:**
 - Email address:
 - Windows Principal:
- Escort Options:**
 - Escort Option: (dropdown)
- PIN:**
 - Pin:
- Modification History:**
 - Last edited on:
 - Last edited by:

Selecting a Personnel View

You can select a Personnel View that you are authorized to use from the **Current View** drop-down list. You may be assigned to use a Personnel View for creating a new Personnel record, and a separate Personnel View for editing an existing record. In this case, if you are editing an existing record, the view for creating a new record is not available from the **Current View** drop-down list.

Two Default Personnel Views are included in C•CURE 9000, as shown in [Figure 7 on Page 39](#). Your Administrator determines which Personnel Views are available to each Operator, so you may see a different list of available Views.

When you close the Personnel editor, the view you used last is remembered, and the Personnel editor opens using that view the next time you run it.

To Select a Personnel View

1. From the Personnel Editor, click  in the Current View field.
2. Choose the Personnel View you want to use from the drop-down list.

Figure 7: Default Personnel Views



Using the Personnel List Context Menu

The Personnel context menu (see [Figure 8 on Page 40](#)) in the Dynamic View of Personnel includes the selections common to all objects, as well as additional selections specific to Personnel records. See [Using the Object List Context Menu on Page 23](#) for more information on the common selections. You can select one or more Personnel in the Dynamic View (using **SHIFT+Left-click** and **CTRL+Left-click**) and perform functions such as Set properties, Add Personnel to Groups, Export Personnel records and Image, Batch Print Badges, using the context menu. See [Table 3 on Page 40](#) for definitions of the Personnel-specific context menu selections.

Figure 8: Personnel List Context Menu

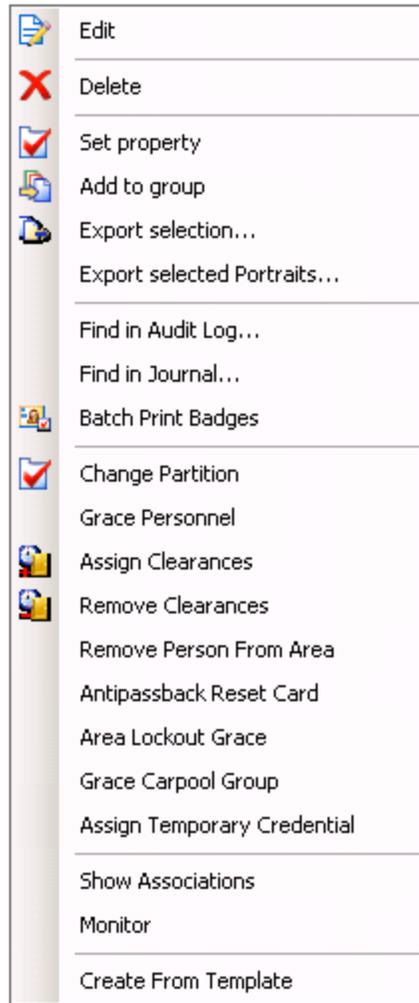


Table 3: Personnel List Context Menu

Selection	Description
Export Selected Portrait	Click this menu selection to open an Export Personnel Portraits dialog box from which you can specify the location and filename of the external file to which to export the Primary Image from the selected Personnel record. See Exporting Personnel Portraits on Page 42 for more information.
Batch Print Badges	This selection is available if you have configured Batch Printing in Options & Tools Badge Setup . Select one or more badges in the Personnel Dynamic View and click this menu selection to batch print the selected badge(s). Depending on your Badge Setup Printer Settings, the badges either print automatically or are added to the Batch Print Queue. If the badges are queued, the C•CURE ID Batch Print Manager dialog box opens to allow you to manage the print queue. From this dialog you can choose to print these badges and any other badges currently in the queue.
Grace Personnel	Click to clear the antipassback/timed antipassback information for selected Personnel and allow them access to the antipassback Area. For more information see the Areas chapter in the <i>C•CURE 9000 Areas and Zones Guide</i> . NOTE: If you select more than 100 Personnel, the Grace Personnel selection is not available.

Personnel List Context Menu (continued)

Selection	Description
Assign Clearances	Select one or more Personnel records from the Dynamic View, then right-click and select Assign Clearances . A dialog box appears that allows you to select one or more Clearances to add to the Personnel records you have chosen. Click OK to assign the Clearances. A dialog box appears to confirm that the Clearances were added, or explain why they were not added. Click OK to close this dialog box. You can also Print or Email the contents of the dialog box.
Remove Clearances	Select one or more Personnel records from the Dynamic View, then right-click and select Remove Clearances . A dialog box appears that allows you to select one or more Clearances to remove from the Personnel records you have chosen. Click OK to remove the Clearances. A dialog box appears to confirm that the Clearances were removed, or explain why they were not removed. Click OK to close this dialog box. You can also Print or Email the contents of the dialog box.
Remove Person from Area	Click to remove the selected Personnel from an Area so they no longer appear in any of the Area's Roll Call Reports. (If personnel swiped into an Area and then tailgated out, the system could have them erroneously recorded as still being in the Area.) NOTE: This action requires a confirmation. It also warns you that it does not change the occupancy counts on the Area's iSTAR Controller and could take a while to complete. For more information see the Areas chapter in the <i>C•CURE 9000 Areas and Zones Guide</i> .
Antipassback Reset Card	Click to reset the iSTAR Global Antipassback owners of the selected Personnel's cards when that iSTAR owner is not communicating. For more information see the Areas chapter in the <i>C•CURE 9000 Areas and Zones Guide</i> . NOTE: If you select more than 100 Personnel, the Antipassback Reset Card selection is not available.
Area Lockout Grace	Click to clear all running Area Lockout timers for the selected Personnel and to allow them one-time access to the target locked-out Areas. For more information see the Areas chapter in the <i>C•CURE 9000 Areas and Zones Guide</i> . NOTE: If you select more than 100 Personnel, the Area Lockout Grace selection is not available.
Grace Carpool Group	Click to clear the Antipassback/timed Antipassback information for the selected Personnel member(s) of one or more Carpool Groups (and all other members of the Carpool Groups) and allow them access to the Carpool Area. This is a 'timed' grace for which you must enter start/end times in a standard Manual Action dialog box. During that time period, everyone in the Carpool Group gets Free access to the Carpool Area. For more information see the Areas chapter in the <i>C•CURE 9000 Areas and Zones Guide</i> . NOTE: If you select more than 100 Personnel, the Grace Carpool Group selection is not available.
Activate Temporary	Click to Activate a Temporary Credential. You can also use this function to change the Expiration date of the credential. A dialog box appears so that you can set the Expiration time span for the Temporary Credential. See Activating a Temporary Credential on Page 143 for more information.
Assign Temporary Credential	Click to assign a Temporary Credential to this Personnel record. A Name Selection dialog box appears listing the Temporary Credentials and their status. If you selected an Unassigned Temporary Credential, it is assigned to the person. If you select an Assigned or Activated Temporary Credential, a Warning appears that if you click OK , the Temporary Credential will be removed from the person it is currently assigned to, and re-assigned to the person you had selected. If you click Cancel , no action is taken.
Return Temporary	Click to return a Temporary Credential to Unassigned status. You use this function when a person returns the access card to you when they no longer need it or it has expired. Once the credential has a status of Unassigned , you can assign it to another person, as needed. Only available for a Personnel record that has a Temporary Credential assigned.

Personnel List Context Menu (continued)

Selection	Description
Show Association	Click this menu selection to view a list of Security Objects associated with this Personnel record. For more information, see "Showing Associations for an Object" in the <i>C•CURE 9000 Getting Started Guide</i> .
Create from Template	Click to create a new Personnel record from this Template. Available only when you right-click on a Personnel Template.

Exporting Personnel Portraits

You can use the **Export selected Portraits** context menu selection to export the Personnel primary portrait image from one or more records in a Personnel Dynamic View to a folder as .jpg format files.

To Export Personnel Portraits

1. In the **Navigation** Pane of the Administration Workstation, click **Personnel** to open the Personnel pane.
2. Select **Personnel** from the Personnel pane drop-down list).
3. Click  to open a Dynamic View listing all Personnel records. (You can also click the down-arrow of this button to either view the list in the current tabbed view or open a new tabbed view).
4. Select one or more Personnel records in the list and right-click. The Personnel context menu appears.
5. Select **Export selected Portraits**. The Export Personnel Portraits dialog box appears.
6. In the **Output folder on the client** field, click  to select a folder on the Administration Client system to store the exported Portraits. (You can alternatively type the name of an existing folder on the client system.)
7. In the Portrait name pattern field, you can click  to add a Personnel record field as part of the file name that is used to store the Portrait file. You can type in the field to customize the filename pattern (you could shorten the filename by removing the '(Object ID)' portion, for instance).

Example:

The default file pattern generates a filename such as Personnel Last, First (5000).jpg. If you select Text1 from this dialog box, the export would generate a filename such as Personnel Last, First (5000)Text1value.jpg

8. You can choose either **Overwrite existing files** or **Rename existing files** to determine how to deal with previously exported Portraits.
 - **Overwrite existing files** replaces existing files of the same name.
 - **Rename existing files** adds a .bak extension to existing files of the same name so that they are not overwritten.
9. Click **Export** to export the primary Portrait of the selected Personnel. A dialog box appears to list the Portraits that have been exported, and list any Personnel records that do not have Portraits associated with them. You can:
 - **Print** the contents of this dialog box.

- **Email** the contents of this dialog box.
- **Open Folder** to view the folder where the Portraits were exported
- Click **OK** to close the dialog box.

Configuring the Disable by Inactivity Process for Personnel Credentials

You can configure your C•CURE 9000 system to automatically disable those personnel credentials (cards) that have been inactive for a specified amount of time. You can define the required inactivity period plus the time of day when this Disable by Inactivity service kicks off, as well as being able to exempt particular personnel from the process.

NOTE

Only Card Admits are considered 'card activity' by the Disabling for Inactivity service. Card Rejects do not count.

For information on how the Disabling by Inactivity process works with MAS and SAS servers, see [Disabling Credentials for Inactivity in an Enterprise Environment](#) on Page 27.

The following tasks are relevant to the Disable by Inactivity process:

- [To Configure your System to Disable Inactive Personnel Credentials](#) on Page 44
- [To Exempt Personnel from having Inactive Credentials Disabled](#) on Page 45

To Configure your System to Disable Inactive Personnel Credentials

1. Set the appropriate values for the two relevant System Variables in the **Personnel** category, **Disable by Inactivity Enabled** and **Disable by Inactivity Scan Time**.

NOTE

In an Enterprise Environment, these System Variables must be configured on each individual MAS/SAS server since credentials must be expired on their own server. (Global Personnel's Credentials are expired by the MAS server, but using information propagated from each SAS server.)

- a. In the Administration Station, on the **Options & Tools** pane, select **System Variables** and expand the **Personnel** category on the **General** tab.
 - b. In the **Name** column, locate the **Disable by Inactivity Enabled** system variable, click in the **Value** field, and change **False** to **True**.
 - c. Locate the **Disable by Inactivity Scan Time** system variable and double-click on the row to edit it.
 - d. On the **System Variables Editor Inactivity Scan Time Variable** tab,
 - Enter the time every day (the hour and minute [in UTC]), when the scan will begin and then find and disable all Personnel Credentials whose lack of activity meets the Inactivity Period value set for their Personnel Type.
 - Click **Save and Close**.
 - e. Click to close the **System Variables General** tab.
2. Configure the Inactivity Period for the Personnel Types defined for your site.
 - a. In the Navigation Pane, click **Personnel** to open the Personnel pane and select **Personnel Type** from the pane drop-down list.
 - b. Click  to open a Dynamic View listing all the Personnel Types in your system.
 - c. Double-click the specific Personnel Type in the list whose Inactivity Period you wish to set.

Example:

Contractor

- d. On the **Personnel Type** Editor, in the **Inactivity Period** field, specify the number of days that must elapse without any card activity for Credentials belonging to Personnel with this designated Personnel Type before an enabled and running Disable by Inactivity service disables these Credentials.

NOTE

The valid range for the number of days you can enter in this field is 3 – 2000. If the default value of 0 (zero) is left, the Disable by Inactivity service will ignore Personnel with this Personnel Type.

- e. Click **Save and Close**.
 - f. Repeat the steps for any other Personnel Types for which you want to set Inactivity Periods.
3. Assign a Personnel Type with a specific Inactivity Period to a Personnel Record.
 - a. Follow the procedure in [Setting the Personnel Type](#) on [Page 49](#).
 - b. Click **Save and Close**.

To Exempt Personnel from having Inactive Credentials Disabled

1. On the Personnel pane, select **Personnel** from the pane drop-down list and then:
Click **New** to create a new Personnel Record.
- or -
Click  to open the Personnel Dynamic View and select the desired Personnel Record.
2. In the **Options** box on the **General** tab, click to select the **Inactivity Exempt** option check box.
3. Click **Save and Close**.

Personnel General Tab

The **Personnel General** tab lets you identify a person, set their Personnel ID, Person Type, Operator Name, Email Address, Escort Option, and PIN. You can also set options for Disabled Access, Alternate Shunt, and Guard Tour, as well as site-specific organizational identifiers. [Figure 6 on Page 38](#) shows the Personnel General tab.

See [Personnel General Tab Definitions](#) on [Page 46](#) for definitions of all fields and buttons on the **Personnel General** Tab.

General Tab Tasks

See the following sections for instruction on performing these tasks.

- [Setting the Personnel Type on Page 49](#)
- [Choosing an Operator Name on Page 50](#)
- [Setting Options on Page 51](#)
- [Setting an Email Address on Page 52](#)
- [Setting the Escort Option on Page 52](#)
- [Setting a General PIN on Page 53](#)

Personnel General Tab Definitions

The fields and buttons on the Personnel General tab are shown in [Table 4 on Page 46](#).

Table 4: Personnel General Tab Definitions

Field/Button	Description
First Name	The first name of the person. This field is not required.
Middle Name	The middle name of the person. This field is not required.
Last Name	The last name of the person. The Last Name field is required.
Personnel ID	This field contains a system generated ID number for this person. This field is read-only.
Personnel Type	<p>Click <input type="button" value="..."/> to choose a Personnel type for this Personnel record by clicking and selecting from the dialog box that appears. The system provides four Personnel Types: Employee, Contractor, Visitor, and None. None is the default value.</p> <p>You can use the Personnel Type Editor to configure the following:</p> <ul style="list-style-type: none"> • Additional Personnel Types to meet your site's needs. <p>Example:</p> <p style="padding-left: 40px;">A Personnel Type called Temporary could be added if your site wanted to identify temporary personnel.</p> <ul style="list-style-type: none"> • Inactivity Periods for specific Personnel Types, which allows Personnel Records with this type to be disabled if their credentials have been inactive for that length of time. <p>For more information see Personnel Type Overview on Page 100.</p>

Personnel General Tab Definitions (continued)

Field/Button	Description
Operator Name	<p>Use this field to identify this person as an Operator who can run C•CURE 9000 applications, such as the Administration workstation and the Monitoring Station.</p> <p>If this person is not intended to be a C•CURE 9000 Operator, leave this field blank.</p> <p>Click <input type="button" value="..."/> to select an Operator for this Personnel record from the list of Operators defined for your system. Each Operator is a person with a Windows system account.</p> <p>NOTE: Each Operator can be assigned to only one Personnel record. If you try to assign an Operator to a Personnel record and that Operator is already assigned to another Personnel record, an error message appears and you cannot save the record.</p>
Partition	A read-only field displaying the partition to which this Personnel record belongs. This field is visible only if the C•CURE 9000 system is partitioned.
Options	
Disabled	<p>Select this option if you want to deny this person access. All of this person's access credentials will be denied access as long as Disabled is selected.</p> <p>Checking this box does not cause any of the person's access credentials to be marked as Disabled on the Credentials tab, but none of these credentials will grant access as long as Disabled is selected on the General tab.</p>
Alternate Shunt (ADA)	Select this option to cause the alternate shunt relays for ADA (Americans with Disabilities Act) door timings to be activated whenever this person is granted access to a door equipped with these options. Alternate shunt relays typically provide additional time for a person to go through a door without causing an alarm condition. (See the <i>C•CURE 9000 Hardware Configuration Guide</i> chapter on Doors).
PIN Exempt (ADA)	<p>Select this option so that a person seeking access at a reader configured on the Reader Keypad tab for both Card and PIN Required and Allow PIN Exempt does not have to enter the PIN.</p> <p>This is useful for disabled personnel with limited use of their fingers or for those who would have difficulty reaching the reader.</p>
Noticed	<p>Select this option to track activities by this person:</p> <ul style="list-style-type: none"> • Displays the Noticed tag in access/reject admit messages. • Triggers any Noticed Events defined when Doors were configured.
Antipassback Exempt	Select this option to make this person exempt from antipassback rules (regular and timed) for all Areas. The person is permitted entry to/exit from antipassback Areas regardless of a violation. While no violation messages are generated/logged, access activity is logged as usual.
Activate Antipassback Event	Select this option so this person activates antipassback events—whether or not the person is antipassback exempt—if the access/exit would ordinarily cause a violation.
Keypad Command Administrator	Select this option to enable this person to use Keypad Commands even if the person is not in a Personnel Group granted the Keypad Command permission.
Intrusion Zone Administrator	Select this option to enable this person to Arm/Disarm Intrusion Zones using the Card swipe Arm/Disarm methods even if the person is not in the Personnel Group configured for that Intrusion Zone.
Inactivity Exempt	Select this option to indicate that this person's credentials cannot be disabled due to a lack of activity in the system.

Personnel General Tab Definitions (continued)

Field/Button	Description
Can Perform Guard Tour	Select this option to enable this person to be assigned to perform a Guard Tour. See the <i>C•CURE 9000 Guard Tours Guide</i> for detailed information about Guard Tours.
Can Host Visits	Select this option to enable this person to act as a Visit Host for Visitor Management, a separately licensed feature. See the <i>C•CURE 9000 Visitor Management Guide</i> for detailed information.
Web Email and Logon	
Email address	<p>Enter an Email address for this Personnel record. This field is not required. However, if an Email address is defined and this person is either of the following, he/she will receive the appropriate email notification:</p> <ul style="list-style-type: none"> • A member of a Personnel Group that is used as an Email Group. • Enabled to perform Guard Tours and assigned to run a specific scheduled Tour. See the <i>C•CURE 9000 Guard Tours Guide</i> for detailed information about Guard Tours. • A person who is eligible to host Visits can use email and a password (Basic Authentication) to login to the Visitor Management Web Portal.
Windows Principal	<p>Enter a Windows domain\username combination for Personnel who are eligible to use Windows Authentication to access the Visitor Management Web Portal as a Host of Visits.</p> <p>This username must be unique on a standalone server. It also must be unique within an Enterprise, or a replication conflict will occur. The Personnel editor cannot validate Enterprise uniqueness.</p> <p>Alternatively, Basic Authentication via an Email address can be used to access the Visitor Management Web Portal by a person who is eligible to host Visits.</p>
Escort Options	
Escort Option	<p>Click the down-arrow to choose an Escort Option for this Personnel record by selecting from the drop-down that appears. The system provides the following four options:</p> <ul style="list-style-type: none"> • Unescorted Visitor – A Visitor to the company who is permitted to go through the facility without an Escort. • Escorted Visitor – A Visitor to the company who must be accompanied by an employee designated as an Escort in order to move through the facility. • Escort – an Employee trained in using the visitor management policies of the company, who knows what to do in any of the following situations: <ul style="list-style-type: none"> - Escorted Visitor's card fails for clearance. - An employee wants to cut in front of or in the middle of the Escorted Visitor queue. • None – the default value.

Personnel General Tab Definitions (continued)

Field/Button	Description
PIN	
PIN	<p>Defines the Personal Identification Number for this Person. This PIN is used for readers that require Card Access Followed by PIN. The PIN is encrypted when stored in the database.</p> <p>If the Display PIN system variable is set to False:</p> <ul style="list-style-type: none"> • The PIN is not visible anywhere in the C•CURE 9000 system. • This field displays asterisks when the cursor is in the field. • A Confirmation window opens when you change the value, then move the cursor to a different field. You need to re-enter the PIN to confirm its value. <p>If the UseGeneralPINForPINOnly system variable is set to True, this field is read-only.</p> <p>The number of digits in the PIN is determined by the PINLength value set in Options & Tools>System Variables. (The maximum size allowed is 9.)</p>
Modification History	
Last Edited On	The Date and Time of the last edit of this Personnel record. This field is updated by the system and is read-only.
Last Edited By	Name of the Operator who last edited the General tab data for this personnel record. This field is updated by the system and is read-only.
Personnel Record Options	
Save and Close	Click Save and Close when you have completed any changes to the Personnel record and wish to save those changes. The Personnel Editor closes.
Save and New	Click Save and New when you have completed any changes to the Personnel record and wish to save those changes, and then want to create a new Personnel record. The Personnel record you were editing is saved, and a new Personnel record opens (either blank or including template information if you were using a template to create new Personnel records).
Save	<p>Click Save when you have made any changes to the Personnel record and wish to save these changes without closing the editor—in order to continue configuring the record.</p> <p>NOTE: If another user editing the same record saves their changes while you are editing it, the following error message displays when you click Save: "Cannot save. The object has changed since you last loaded it."</p>
Current View	This field shows the currently selected Personnel View, and the drop-down list shows the other Personnel Views that can be selected. The Current View field only shows the Personnel Views that the Operator can access.
Close	<p>Click Close when you want to close the Personnel Editor without saving your changes.</p> <p> A prompt appears so that you can choose to continue editing or close the editor. Click OK to close the editor without saving changes, or click Cancel to continue editing the Personnel record.</p>

Setting the Personnel Type

The Personnel Type field lets you categorize each Personnel record in your database based on the person's role or type. By default you can choose **Employee**, **Contractor**, **Visitor**, or **None**.

You can also define additional Personnel Types to suit your site, however. For example, if you want to identify Personnel records as Security Personnel, Maintenance Personnel, Temporary Employees, or any other category, you can create these new Personnel Types with the Personnel Type Editor (see [Personnel Type Overview](#) on [Page 100](#)), and then assign the new type to Personnel records in your database.

In addition, the Personnel Type you assign to a Personnel record can control the following:

- Whether or not their Credential(s) can be disabled for lack of activity in the system.
- The number of days without valid card activities before a running Disable by Inactivity service disables the Credential(s). For more information, see [Disabling Credentials for Inactivity Overview](#) on [Page 26](#)

To Set the Personnel Type

1. From the Personnel General Tab, click **Select** in the **Personnel Type** field to open a selection dialog listing available Personnel Types.
2. Click a Personnel Type in the list to select that Personnel Type.

You can also click the **Actions** button and select **New** to create a new Personnel Type for this person or **Edit** to modify an existing Personnel Type. For more information about the **Actions** button, see the *C•CURE 9000 Getting Started Guide*.

3. To save the Personnel Type, click **Save and Close**.

Choosing an Operator Name

You choose an Operator name to give a person the ability to run C•CURE 9000 applications, such as the Administration Workstation or the Monitoring Station. You choose an Operator Name from a list of Operators configured for your system. Operators are configured using the Configuration Pane Operator Editor.

An Operator name is related to a specific Windows user account, and has a defined set of Privileges that determine exactly which functions and features of C•CURE 9000 the Operator can and cannot access.

Example:

An Operator whose job it is to enter Personnel data may not be able to run the Monitoring Station, view Hardware status, unlock doors, or view video.

To Choose an Operator Name

1. From the **Personnel General** Tab, click **Select** in the **Operator Name** field to open a selection dialog listing available Operators.
2. Click a name in the list to select that Operator.
3. If there are no available or appropriate Operators in the list, you need to create one for the person. Click the **Actions** button and select **New** to create a new Operator or **Edit** to modify an existing Operator. Then repeat the previous steps. For more information about the **Actions** button, see the *C•CURE 9000 Getting Started Guide*.
4. To save the Operator Name, click **Save and Close**.

Setting Options

You can set a number of options for a Personnel record from the **Personnel General** tab.

To Set Options

1. Select **Disabled** if you want to deny this person access. All of this person's access credentials and their PIN will be denied access as long as Disabled is selected. If you select this option, the person will **not** be able to gain access using any of their access cards or their PIN.

Checking this box does not cause any of the person's access credentials to be marked as disabled on the Credentials tab, but none of these credentials will grant access as long as **Disabled** on the General tab is selected.
2. Select **Alternate Shunt (ADA)** to cause the alternate shunt relays for ADA (Americans with Disabilities Act) door timings to be activated whenever this person is granted access to a door equipped with these options. Alternate shunt relays typically provide additional time for a person to go through a door without causing an alarm condition. For more information, see the *C•CURE 9000 Hardware Configuration Guide* chapter on Doors.
3. Select **PIN Exempt (ADA)** so a disabled person seeking access at a reader configured for both "Card and PIN Required" and "Allow PIN Exempt" does not have to enter the PIN on the keypad. For information, see the *C•CURE 9000 Hardware Configuration Guide* section on iSTAR Readers.
4. Select **Noticed** to set this Personnel record so that access attempts are marked with the Noticed flag (allowing you to track these attempts). If the Noticed Flag is selected, the journal message displays "Noticed" when an access attempt occurs.
5. Select **Antipassback Exempt** to make this person exempt from antipassback rules (regular and timed) for all Areas. The person is permitted entry to/exit from an antipassback Area regardless of a violation). If this option is selected, **no** violation message are generated/logged, but access activity is logged as usual.
6. Select **Activates Antipassback Event** so this person activates antipassback events – whether or not the person is antipassback exempt – if the access/exit would ordinarily cause a violation .
7. Select **Keypad Command Administrator** to enable this person to be able to use Keypad Commands even if the person is **not** in a Personnel Group granted the Keypad Command permission. If this option is selected, this person can use any Keypad Commands regardless of the Personnel Group the command is validated for.
8. Select **Intrusion Zone Administrator** to enable this person to Arm/Disarm Intrusion Zones using the Card swipe Arm/Disarm methods even if the person is not in the Personnel Group configured for that Intrusion Zone.
9. Select **Inactivity Exempt** to enable this person to be exempt from having credentials disabled because of inactivity, . If this option is selected, this person's credentials cannot be disabled even if they have not been active for the amount of time configured for their assigned Personnel Type.
10. Select **Can Perform Guard Tour** to enable this person to be able to perform Guard Tours. If this option is selected, this person can be assigned to walk any Guard Tour. See the *C•CURE 9000 Guard Tours Guide* for detailed information about Guard Tours.
11. Select **Can Host Visits** to allow this person to act as a Visit Host for Visitor Management, a separately licensed feature. See the *C•CURE 9000 Visitor Management Guide* for detailed information.
12. To save the Options Settings, click **Save and Close**.

Setting an Email Address

You can define an Email address for a person on the **Personnel General** tab. Then, if the person is either of the following:

- A member of a Personnel Group that becomes used as an Email Group, he/she will receive any Email sent to that Group.
- Enabled on the **Personnel General** tab to perform Guard Tours and assigned on the **Guard Tour Scheduling Editor** to run a specific scheduled Tour, he/she will receive email notification of the Tour—if that option is selected. (See the *C•CURE 9000 Guard Tours Guide* for detailed information about Guard Tours.)

To Set an Email Address

1. From the **Personnel General** tab, click in the **Email** field.
2. Type the Email address for this Personnel record.
3. To save the address, click **Save and Close**.

Setting the Escort Option

You can configure a person's Escort option—**None**, **Unescorted Visitor**, **Escorted Visitor**, **Escort**—which controls how he/she is able to move around a facility, through its Doors and into and out of Areas.

To Configure a Person's Escort Option

1. Click the **Personnel** drop-down list and select **Personnel**.
2. Click **New** to create a new Personnel record.

- or -

Click  to open a Dynamic View showing a list of all existing Personnel Objects, right-click the Personnel record you want to change, and click **Edit** from the context menu that appears.

The **Personnel Editor** opens with the **General** Tab displayed.

3. In the **Escort Options** box, click the down-arrow next to the combo box and select the **Escort Option** you want for this Personnel record:
 - **None** (the default)
 - **Unescorted Visitor** - A Visitor to the company who is permitted to go through the facility without an Escort.
 - **Escorted Visitor** - A Visitor to the company who must be accompanied by an employee designated as an Escort in order to move through the facility.
 - **Escort** - an Employee trained in using the visitor management policies of the company, who knows what to do in any of the following situations:
4. To save the Personnel Escort Option, click **Save and Close**.

Setting a General PIN

You can set a general Personal Identification Number (PIN) for a person on the **Personnel General** tab.

There are three System Variables (choose **Options & Tools>System Variables**, then double-click **Personnel**) that affect the General PIN.

- If the **Display PIN** System Variable is set to **False**, the actual PIN number is not displayed, it is replaced by “•” characters. If the **Display PIN** System Variable is set to **True**, the PIN numbers are visible.
- If the **Use General PIN for PINOnly Access** System Variable is set to **True**, the PIN on the **General** tab will be the same as the PIN on the PINOnly access credential. If you Auto Generate a PIN on the **Credentials** tab, it replaces the General PIN, and the General PIN field is no longer editable.
- The length of the PIN is set in the System Variable **PINLength**. The PIN length can be from 3-9 digits long. The default value is 4.

NOTE

A general PIN differs from a PIN-Only credential. A general PIN is used in conjunction with an access card at designated reader and keypad combinations to gain access to a location. A PIN-only access credential is used at keypad-only access locations in place of a access card. You can define a PIN-only credential on the **Personnel Credentials** tab.

To Set a General PIN

1. From the **Personnel General** tab, click in the **PIN** field.
2. In the **PIN** field, type the PIN for this Personnel record.
3. If your system is set up to **not** display the PIN number, a dialog box appears asking you to validate the PIN you entered by retyping it in the dialog box.
4. To save the PIN, click **Save and Close**.

Personnel Credentials Tab

The Credentials tab allows you to add and configure access credentials for a person. For each credential, you can specify the type, format, activation and expiration dates, and current status.

Figure 9 on Page 54 shows the **Personnel Credentials** tab. The fields in the lower part of the Credentials tab are not active until you click **Add Card Access**. Then you can enter information into the fields.

Personnel Credential Tab Tasks

- [Activating and Expiring Access Cards on Page 59](#)
- [Adding an Access Card on Page 61](#)
- [Adding a PIN-Only Access Credential on Page 62](#)
- [Removing an Access Card on Page 62](#)
- [Validating a CHUID on Page 63](#)

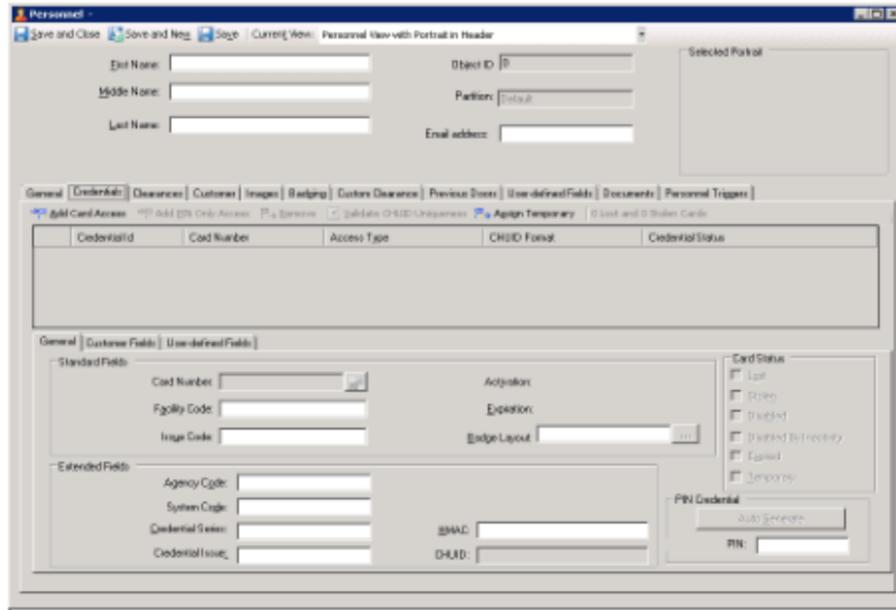
Personnel Credential Tab Definitions

See [Personnel Credentials Tab Definitions on Page 55](#) for definitions of all fields and buttons on the **Personnel Credentials** tab. Figure 9 on Page 54 shows the **Personnel Credentials** tab.

Figure 9: Personnel Credentials Tab

If your system has User-defined Credentials fields, a new tab can be added to a Personnel View Credentials tab to contain Credential fields that were added to the Personnel View. Figure 10 on Page 55 shows the Personnel View called **Personnel View with Portrait in Header**, which has a User-defined Fields tab positioned on the Credentials tab. See the User-defined Fields chapter in the *C•CURE 9000 Software Configuration Guide* for more information about User-defined fields.

Figure 10: Credentials Tab with User-defined Fields Tab



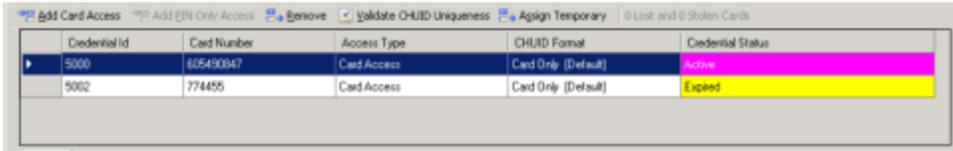
Personnel Credentials Tab Definitions

The fields and buttons on the Personnel Credentials tab are shown in [Table 5](#) on [Page 55](#).

Table 5: Personnel Credentials Tab Definitions

Field/Button	Description
Credential Table	
Credential ID	The sequence number for each Credential is incremented for each Credential for a given person. This value is unique and thus useful for importing Personnel and their credentials. This value is auto-generated and cannot be changed.
Card Number	<p>Card Number is a value up to 20 digits in length (with a maximum value of 18446744073709551615).</p> <p>The card number is manually typed in and need not be unique as long as the CHUID of which it is a part of is unique. The card number length may be limited to less than 20 digits by the CHUID format you are using.</p> <p>Example:</p> <p>A card number of 333 with a facility code of 2 would not conflict with a card number of 333 with a facility code of 3, if the facility code was part of the CHUID.)</p> <p>Three fields are filled in when you type a card number in this field:</p> <ul style="list-style-type: none"> The Card Number field in the Credentials data grid. The read only Card Number field. The read only CHUID Format field. <p>For a PIN-Only credential, the label PIN is displayed in the Card Number field. The PIN itself is never displayed in this table.</p>
Access Type	The Access Type for each Credential. The value is set to Card Access if you click Add Card Access or PIN-Only if you click Add Pin Only Access .

Personnel Credentials Tab Definitions (continued)

Field/Button	Description
CHUID Format	This field shows the CHUID format chosen for each credential. Click the field and then click  to choose a CHUID format. A Selection dialog box opens, listing the applicable enabled CHUID formats. For a PIN-Only credential, the PIN-Only CHUID format is automatically chosen and cannot be changed.
Credential Status	<p>This read-only field shows the setting from the Card Status fields:</p> <ul style="list-style-type: none"> • If none of the Card Status fields are selected, and the current date is between the Activation and Expiration Dates on this tab, the status is Active. • If today's date is outside of the Activation and Expiration Dates range, the status is Expired. • If the Credential has been marked as Lost and/or Stolen, the status is Lost or Stolen. • If the credential has been manually disabled (either by selecting Disabled on the General tab to disable all credentials, or Disabled on the Credential tab to disable a specific credential) then the status is Disabled. • If the credential has been automatically disabled by the Disable by Inactivity Service, the status is Disabled by Inactivity. <p>NOTE: For information, see Disabling Credentials for Inactivity Overview on Page 26</p> <p>If the System Variable Credential Expired Status Color has been assigned a color value, an Expired card is displayed with that color background.</p> <p>If the System Variable Credential Active Status Color has been assigned a color value, an Active is displayed with that color background.</p>  <p>See UI Settings in the <i>C•CURE 9000 System Maintenance Guide</i> for more information.</p>
Standard Fields	
Card Number	A read-only field displaying the Card Number entered into the Credentials table for this record.
Generate a Unique Random Card Number 	<p>Click this button to assign a unique random card number to this credential. This card number contains up to the maximum number of digits for the CHUID format chosen for the credential. For example, the default 'Card Only' CHUID format generates card numbers with no more than ten digits.</p> <p>Three fields are filled in when Generate Unique Random Card Number is pressed:</p> <ul style="list-style-type: none"> • The Card Number field in the Credentials data grid. • The read only Card Number field • The read only CHUID format field <p>This behavior is the same as if a manual entry had been made into the Card Number field of the Credentials data grid.</p>
Facility Code	The Facility Code for the credential, entered manually, which can be up to 9223372036854775807, unless limited by the CHUID Format.
Issue Code	The Issue Code , usually used to indicate the number of times the credential has been issued. The value can be up to 2147483647, as limited by CHUID Format.

Personnel Credentials Tab Definitions (continued)

Field/Button	Description
Smart ID	Visible only if a Smart ID CHUID format has been enabled. Represents a 128-bit field used for Smart Card credentials. This field is read-only unless you select a CHUID format created from the Smart ID CHUID Template (see CHUID Format Overview on Page 168). If you select a Smart ID CHUID format, the values you enter into the Smart ID field are used to populate the CardInt2, CardInt3, and CardInt4 fields, and to generate the read-only CHUID field.
Activation	The Activation Date for the credential. The time defaults to the time the credential was created
Expiration	Defines the Date and Time when this Card is considered expired. For new credentials, this is set to the number of years specified in the System Options to be added to the Activation Date Time.
Badge Layout	Select the Badge Layout to be used for this credential from the list of badge layouts in this selection list.
Mobile Number	Visible only if the Smart ID Personnel System Variable is enabled, and you add the field to a Personnel View (Personnel Views Editor on Page 182). See the System Variables chapter in the <i>C•CURE 9000 System Maintenance Guide</i> for information about System Variables. The Mobile Number field is read only. Its value is assigned via an external enrollment application.
Card Status	
Lost	Use this selection to indicate that a badge has been reported lost. (Not applicable to PIN-Only credentials.)
Stolen	Use this selection to indicate that the credential has been reported stolen.
Disabled	Use this selection to indicate that the badge has been manually disabled.
Disabled by Inactivity	This read-only field indicates that the credential was disabled by the Disable by Inactivity process. The process sets both the Disabled by Inactivity check box and the Disabled check box to True (<input checked="" type="checkbox"/>) If you clear (<input type="checkbox"/>) the Disabled check box, the Disabled by Inactivity check box is also cleared, and the Disabled by Inactivity date is recalculated to restart with the current date. The Disabled by Inactivity date is also recalculated to restart with the current date if the Lost or Stolen check boxes are cleared. NOTE: For information, see Disabling Credentials for Inactivity Overview on Page 26 .
Expired	This check box is set to True (<input checked="" type="checkbox"/>) when the Expiration date has passed.
Temporary	
BLE	Visible only if the Smart ID Personnel System Variable is enabled, and you add the field to a Personnel View (Personnel Views Editor on Page 182). See the System Variables chapter in the <i>C•CURE 9000 System Maintenance Guide</i> for information about System Variables. This check box indicates that this credential can be assigned to a mobile device and read by a Bluetooth Low Energy (BLE) Reader. If this box is not checked, the Credential will not work at the BLE reader.
Extended Fields	
Agency Code	Identifies the government agency issuing the credential.
System Code	Identifies the system in which the card is enrolled and is unique for each site.
Credential Series	This field is available to reflect major system changes.

Personnel Credentials Tab Definitions (continued)

Field/Button	Description
Credential Issue	A value that is set to '1' the first time a card is issued, and is incremented by one whenever a replacement card is issued. The code can be up to 20 digits in length, but the usual length in a government card format is 1 digit.
HMAC	<p>Hash Message Authentication Code. This value is unique for each card record, and is calculated by smart card readers based on card data, the site key, and the hashing algorithm used by the reader.</p> <p>The HMAC for a card can be different based on the reader type at which the card is presented because different reader manufacturers use different hashing algorithms. As a result, you may have to configure multiple card records for a given physical card if that card will be used for access at multiple reader types.</p> <p>Set this value to 0 for non-extended cards.</p>
CardInt1-CardInt4	CardInt fields are user-named fields provided for proprietary extended card fields that you may use at your site.
CHUID	<p>The Card Holder Unique Identifier (CHUID) is a number generated by the system, based on the CHUID Format and the values in other credential fields.</p> <p>The CHUID has an 80-Digit Maximum and a 10-Digit Minimum. It must have an even number of digits. All CHUIDS in the system, regardless of the format used, must have the same length, so CHUIDs using a shorter CHUID Format are padded with 0s.</p>
PIN Credential	
PIN	<p>PIN (Personal Identification Number) is a number assigned to a cardholder. The cardholder uses this PIN at keypads when required. Use this field only if your card readers have keypads.</p> <p>This PIN field on the Credentials tab is used for PIN-only access credentials. If you are using a General PIN, the PIN is displayed on the General tab.</p>
Auto Generate	<p>Click this button to generate a unique PIN number for a PIN-Only credential. When you click the button, a dialog appears to show you the generated PIN. This is the only time the PIN is displayed, so you need to communicate it to the person who will be using the PIN. If you click the button again, a new PIN is generated to replace the previous one.</p> <p>If a person forgets their PIN, you must replace it with a new PIN. The PIN is encrypted when stored in the database, and there is no way to look it up.</p> <p>This button is available only if you are editing a PIN-Only credential.</p>
Miscellaneous	
Personnel Identifier	<p>A number field usually used in Government extended format access cards. This field is optional and it need not have a unique value. Its maximum size can be 9223372036854775807.</p> <p>It can be included in a CHUID Format, in which case its length may be limited by the CHUID format.</p>
Association Category	<p>A number field usually used in Government extended format access cards. This field is optional, and it need not have a unique value. Its maximum size can be 9223372036854775807.</p> <p>It can be included in a CHUID Format, in which case its length may be limited by the CHUID format.</p>
Organizational Category	<p>A number field usually used in Government extended format access cards. This field is optional, and it need not have a unique value. Its maximum size can be 9223372036854775807.</p> <p>It can be included in a CHUID Format, in which case its length may be limited by the CHUID format.</p>
Organizational Identifier	<p>A number field usually used in Government extended format access cards. This field is optional, and it need not have a unique value. Its maximum size can be 9223372036854775807.</p> <p>It can be included in a CHUID Format, in which case its length may be limited by the CHUID format.</p>

Personnel Credentials Tab Definitions (continued)

Field/Button	Description
Buttons	
Add Card Access	Click this button to add a new access credential. This button is unavailable if the person already has the maximum number of credentials.
Add PIN Only Access	Click this button to add a new PIN-Only access credential. This button is unavailable if the person already has a PIN-Only access credential (only one per person is allowed), or already has the maximum number of credentials. Also, a PIN-only CHUID format must be enabled for Add PIN Only Access to be available.
Remove	Click a Credential row, then click Remove to remove the selected access Credential
Validate CHUID Uniqueness	Click this button to check whether the CHUID for this Personnel record is unique. A dialog box appears that displays the CHUID and states whether it is valid (unique) or not.

Credentials Tab Tasks

You can perform the following tasks from the Credentials tab:

- [Activating and Expiring Access Cards on Page 59.](#)
- [Adding an Access Card on Page 61.](#)
- [Adding a PIN-Only Access Credential on Page 62.](#)
- [Removing an Access Card on Page 62.](#)
- [Validating a CHUID on Page 63.](#)

You can add an access card to the list of Credentials for a Personnel record. A Personnel record can have many access credentials (up to five), depending on the value specified in the Personnel System Variable Maximum Cards Per Person. For information about System Variables see the *C•CURE 9000 System Maintenance Guide*.

Activating and Expiring Access Cards

The value of the **Credential Status** field on the Personnel Credentials tab determines whether or not an access card can be used to gain access.

- A card with a status of **Active** can be used to gain access.
- A card with a status of **Expired**, **Lost**, **Stolen**, **Disabled**, or **Disabled by Inactivity** cannot be used to gain access.
 - a. You set the **Credential Status** for a card by changing the **Activation** and **Expiration** date/time of the Credential, as well as setting a **Card Status Value** (**Lost**, **Stolen**, or **Disabled**).
 - You can use the **Activation** and **Expiration** date/time fields to control when access cards you create become valid for use and when they are invalid. You can set an **Activation** and **Expiration** date when you created a Credential, but you can subsequently change these settings at a later time if the need arises.
 - b. You cannot manually set the **Credential Status** of a card to **Disabled by Inactivity** yourself. You have to configure your C•CURE 9000 system to automatically disable cards that have not been active for a configured period of time. For information, see [Disabling Credentials for Inactivity Overview on Page 26.](#)

Also see [Configuring the Disable by Inactivity Process for Personnel Credentials on Page 44.](#)

c. A Card Status of **Temporary** Indicates that the card is a Temporary Credential. This status is independent of the other status settings. See [Credential Editor on Page 132](#) for more information.

Table 6 on Page 60 shows how to use the Activation and Expiration date/time fields to achieve a variety of Credential Status settings.

Table 6: Setting the Credential Status

To Make Credential Status...	Settings	Description
Always Active	<p>Activation date/time = Expiration date/time</p> <p>Example:</p> <p>Activation: 5 /5 /2009 11:55 PM Expiration: 5 /5 /2009 11:55:PM</p>	<p>This setting allows you to set up a credential that does not expire.</p> <p>Both the date and time portions of the Activation and Expiration fields must match exactly.</p>
Active for Time Period	<p>Activation date/time < Expiration date/time</p> <p>and</p> <p>Expiration date/time > current date</p> <p>Example:</p> <p>Activation: 1 /5 /2008 11:55 PM Expiration: 5 /5 /2014 11:55:PM</p>	<p>This setting allows you to set when a date when the credential first becomes Active, and when it becomes Expired.</p>
Expired	<p>Expiration date/time < current date</p> <p>Example:</p> <p>Activation: 1 /5 /2008 11:55 PM Expiration: 5 /5 /2008 11:55:PM</p>	<p>This setting allows you the set a credential as currently Expired. It will never become Active if you do not change the Expiration date/time.</p>
Expired for Time Period	<p>Activation date/time > Expiration date/time</p> <p>Example:</p> <p>Activation: 1 /5 /2011 11:55 PM Expiration: 9 /20/2010 11:55:PM</p>	<p>Allows you to make the Card Active before the Expiration date/time and after the Activation date/time, but is Expired between these dates.</p> <p>Example:</p> <p>If you have an employee who will be on a leave of absence for 3 months next year, you can have the card Active now, Expired during the absence, and Active when they return.</p>
<p>This setting is allowed only if you set the System Variable Allow Activation After Expiration to True. You can then save a credential with an Activation Date later than the Expiration Date. You can use this to expire cards for a period of time, and then activate them. The card is valid for use up until the Expiration Date, then is invalid for use until the Activation Date occurs.</p> <p>If this System Variable is set to False (the default value) you cannot save a credential with an Activation Date later than the Expiration Date. For information about System Variables see the <i>C•CURE 9000 System Maintenance Guide</i>.</p>		
Lost	Card Status <input checked="" type="checkbox"/> Lost	Credential Status is set to Lost ; card is denied access.
Stolen	Card Status <input checked="" type="checkbox"/> Stolen	Credential Status is set to Stolen ; card is denied access.
Disabled	Card Status <input checked="" type="checkbox"/> Disabled	Credential Status is set to Disabled ; card is denied access.
Expired By Inactivity	Card Status <input checked="" type="checkbox"/> Expired By Inactivity	Credential Status is set to Expired By Inactivity ; card is denied access.

Setting the Credential Status (continued)

To Make Credential Status...	Settings	Description
Temporary	Card Status <input checked="" type="checkbox"/> Temporary	Credential Status is set to Temporary ; access is determined by other status settings.

Adding an Access Card

To Add an Access Card

- From the **Credentials** tab of the Personnel Editor, click **Add Card Access**. (If this button is unavailable, it means that the maximum number of credentials for this Personnel record are already configured. See the system variable **Maximum Cards Per Person** in the *C•CURE 9000 System Maintenance Guide*.)
- A new row appears in the table listing the person's credentials. In addition, the **Standard Fields**, **Extended Fields**, **Card Status**, and **PIN Credential** fields below the table display the values for the currently selected credential.
- Type the card number for this credential into the **Card Number** field in the selected table row.
 Optionally, you can click  to generate a random card number. See **Generate a Unique Random Card Number** in [Table 5](#) on [Page 55](#) for more information.
- If you want to change the default value of the CHUID format, click in the **CHUID Format** field on the table row, then click  to select a CHUID format from the list of CHUID formats (only Enabled CHUID formats are available for selection).
- Review the values in the **Standard Fields** section of the **Credentials** tab, and modify them as needed. See [Personnel Clearances Tab Definitions](#) on [Page 64](#) for definitions of these fields.
- You can add a Badge Layout for this access card by clicking  in the **Badge Layout** field and selecting a Badge Layout from the dialog box that appears. See [Badge Layout Editor](#) on [Page 162](#) for more information about Badge Layouts.
 You can also click the **Actions** button  and select **New** to create a new Badge Layout for this access card or **Edit** to modify an existing Badge Layout. For more information about the **Actions** button, see the *C•CURE 9000 Getting Started Guide*.
- To modify the **Credential Status**, set the values of the **Activation**, **Expiration**, **Lost**, **Stolen**, or **Disabled** fields. See [Activating and Expiring Access Cards](#) on [Page 59](#) for information on using these fields to set the Credential Status.
 - Select **Lost** to indicate that a badge has been reported lost. Not applicable to PIN-Only credentials.
 - Select **Stolen** to indicate that the credential has been reported stolen.
 - Select **Disabled** if you want to indicate that the badge has been manually disabled, thereby denying access to the person when they use any of their access cards or PIN.
 As long as **Disabled** on the General tab is selected on the General tab, the person's access attempts will be denied. You will still need to check this box to indicate the card has been manually disabled.

- The Expired field is set to True when the Expiration Date has passed. The Expiration field on this tab defines the Date and Time when this Card is considered expired. For new credentials, this will be set to the number of years specified in the System Options to be added to the Activation Date Time.
8. If you are using an Extended Card, you can modify the **Extended Fields** values as appropriate. See the [Personnel Clearances Tab Definitions](#) on [Page 64](#) for definitions of these fields.
 9. To save the Credentials settings, click **Save and Close**.

Adding a PIN-Only Access Credential

You can assign only one PIN-Only Access Credential to a Personnel record. However, the Add PIN-Only Access button may be unavailable if:

- A Personnel record already has a PIN-Only Access Credential.
- A Personnel Record already has the maximum number of Credentials, even if no PIN-Only Access Credential has been assigned.
- You have not created and enabled a PIN Only CHUID Format from the PIN Only CHUID Format template (see [CHUID Format Tasks](#) on [Page 171](#)).

You must use the **Auto Generate** button to generate a unique PIN when you use this option. If you have set the **Display PIN** System Variable to False, the generated PIN number is visible only in the **PIN Confirmation** dialog box that appears when you click **Auto Generate**. You must give the PIN information to the person who will use it for access at that time, because you cannot re-display the PIN. If the person forgets their PIN, you must Auto Generate a new PIN for the person.

If the **Display PIN** System Variable is set to **True**, the PIN numbers are visible on the **Credentials** tab.

To Add a PIN-Only Access Credential

1. From the **Credentials** tab of the Personnel Editor, click **Add PIN Only Access**.
2. Click **Auto Generate** (located at the bottom of the dialog box in the **PIN Credential** section).
3. A dialog box appears so that you can see the PIN the system generated. Give this PIN information to the person who will use the PIN, then click **OK**.
4. If the PIN generated is **not** appropriate, you can click **Auto Generate** again to generate a new unique PIN.
5. To save the **Credentials** settings, click **Save and Close**.

Removing an Access Card

To Remove an Access Card

1. From the **Credentials** tab of the Personnel Editor, click on the Credential in the list of Credentials that you wish to remove.
2. Click **Remove** to remove the Credential.
3. To save the **Credentials** settings, click **Save and Close**.

Validating a CHUID

When a Personnel record is saved, the CHUID for each credential in the Personnel record is checked to make sure that it is unique in the system. A card access credential must be unique among all card access credentials, and a PIN-Only access credential must be unique among all PIN-Only access credentials.

If any of the credentials is **not** unique when you attempt to save a Personnel record, an error message appears identifying which credential is not unique. You can then adjust one or more of the CHUID fields to make the credential CHUID unique.

You can also check the uniqueness of any credential by selecting a credential on the **Credentials** tab and clicking **Validate CHUID Uniqueness**.

Example:

If you have received an error message that a credential is not unique, you can change the value of a CHUID field and click **Validate CHUID Uniqueness** to test whether or not the value is now unique.

To Validate CHUID Uniqueness

1. From the **Credentials** tab of the Personnel Editor, click the Credential in the list of Credentials that you wish to validate.
2. Click **Validate CHUID Uniqueness** to test whether the CHUID for the selected credential is unique.
3. If the CHUID is not unique, an error message appears stating that the CHUID is not unique, and displaying the CHUID value.
4. If the CHUID is unique, a message appears showing the CHUID and stating that the CHUID is valid.
5. To save the Credentials settings, click **Save and Close**.

Personnel Clearances Tab

The **Personnel Clearances** Tab lets you assign access privileges (Clearances) to a person. A Clearance specifies the Doors or Door Groups and Elevators or Elevator Groups that a person can access, and the scheduled times that access can occur. You can also set the Clearance Filter level for this person.

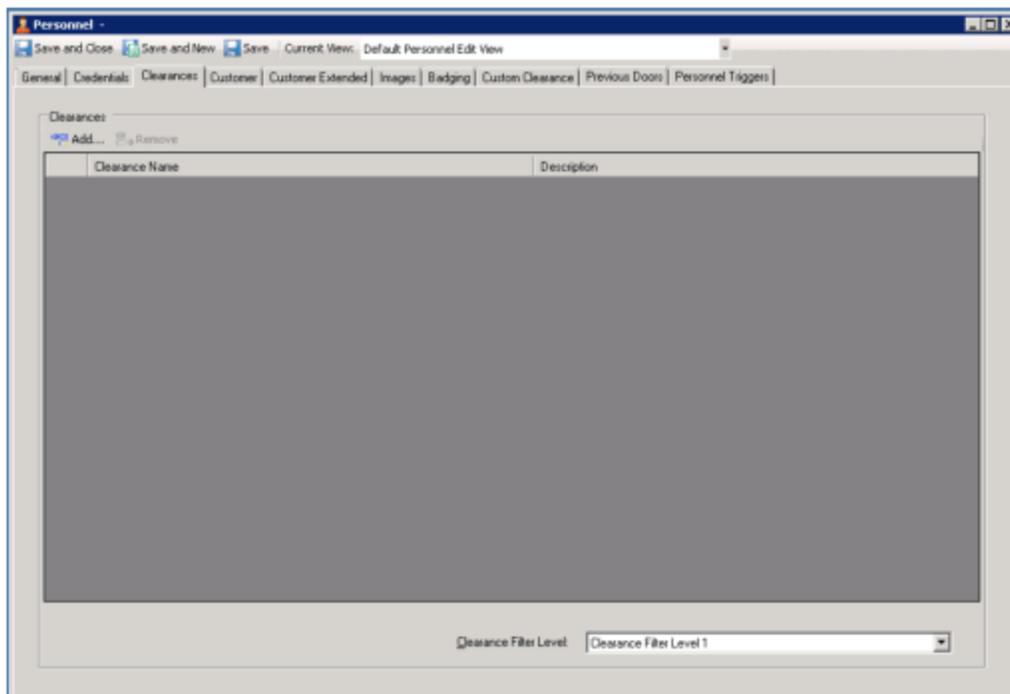
See [Personnel Clearances Tab Definitions](#) on [Page 64](#) for definitions of all fields and buttons on the **Personnel Clearances** tab. [Figure 11](#) on [Page 64](#) shows the **Personnel Clearances** tab.

See [Clearances Tab Tasks](#) on [Page 65](#) for the tasks you can perform from the Clearances tab.

NOTE

The **Clearance Partition** column is visible only if the system is Partitioned.

Figure 11: Personnel Clearances Tab



Personnel Clearances Tab Definitions

The fields and buttons on the Personnel Clearances tab are shown in [Table 7](#) on [Page 64](#).

Table 7: Personnel Clearances Tab Definitions

Field/Button	Description
Clearance Id	Displays the system-generated ID of the Clearance.
Clearance Name	Displays the name of the Clearance.

Personnel Clearances Tab Definitions (continued)

Field/Button	Description
Clearance Partition	Displays the name of the Partition the Clearance resides in. This column is visible only on a Partitioned system.
Description	Displays the description of the Clearance entered by the Operator when the Clearance was last edited.
Add	Click this button to add a new clearance. You can select one or more Clearances from the Clearance Select dialog box that appears, and click OK to add them to the Personnel record. You can use CTRL+Left click and SHIFT+Left-click to select multiple Clearances The number of clearances allowed per person is defined in Options & Tools>System Variables .
Remove	Click this button to remove the selected clearance(s). A dialog box appears asking you to confirm the removal. Click Yes and the selected credentials are removed.
Clearance Filter Level	You can select a Clearance Filter Level for this person from the drop-down list. The available Clearance Filter Levels are numbered 1 through 6. Level 1 is the lowest level and is the default level for both Personnel and Readers. Level 6 is the highest level. You can use the Levels to restrict access by activating an Event that raises the Clearance Filter Level of one or more Readers. Personnel with a lower Clearance Filter Level than the reader are denied access.

Clearances Tab Tasks

You can perform the following tasks from the Clearances tab:

- [Adding a Clearance on Page 65.](#)
- [Removing a Clearance on Page 66.](#)
- [Setting a Clearance Filter Level on Page 66.](#)

Adding a Clearance

You can add a Clearance to a Personnel record to specify the access rights for this person.

NOTE

The maximum number of Clearances that you can assign to a Personnel record is set by the System Variable **Maximum Clearances Per Person** in **System Variables** for Personnel. The default value is 10. For information about System Variables see the *C•CURE 9000 System Maintenance Guide*.

To Add a Clearance

1. From the **Clearances** tab of the Personnel Editor, click **Add**. A **Clearance** selection control dialog box appears.
2. Select one or more clearances from the list of clearances in the dialog box. You can select multiple clearances by using **CTRL+Left-click**, or you can select a range of clearances by clicking the first row in the range, then using **SHIFT+Left-click** to select the last row in the range.
3. Click **OK** to accept the selections you have made, or click **Cancel** to discard your selections.
4. The Clearances you selected are added to the table listing clearances for this person.
5. To save the **Clearances** settings, click **Save and Close**.

Removing a Clearance

To Remove a Clearance

1. From the **Clearances** tab of the Personnel Editor, click the row in the Clearances table that you wish to remove.
To select a row, click on the row selector. The row is highlighted, and the row selector changes to .
2. Click **Remove**. A dialog box opens for you to confirm the deletions.
3. Click **Yes** to delete the Clearance, or **No** to cancel the deletion.
4. To save the **Clearances** settings, click **Save and Close**.

Setting a Clearance Filter Level

You can set a Clearance Filter Level for a person that determines whether or not the person can gain access at specific iSTAR Readers. A person must have a greater or equal Clearance Filter Level than the Reader for access to be granted. The default Clearance Filter level for Personnel is 1.

When an Event or condition changes the Clearance Filter level of readers on this C•CURE 9000 Server, the new Personnel Clearance Filter Level is applied to any Personnel who swipe a credential at those readers, and Personnel with a lower Clearance Filter Level than the reader are denied access. Personnel with equal or greater Clearance Filter Level are granted or denied access based on their Clearance.

Example:

You set up an Event that activated during a security lockdown by setting the Clearance Filter Level for a group of iSTAR readers to Level 4. Any Personnel who have a Clearance Filter setting lower than Level 4 who attempt to access those readers are denied access.

To Set a Clearance Filter Level

1. Open the Personnel editor. (See [Accessing the Personnel Editor on Page 38.](#))
2. Navigate to the Clearances tab.
3. Click  in the **Clearance Filter Level** field to select a Clearance Filter Level from the drop-down list.
4. Click **Save and Close** to save your changes to the Personnel record.

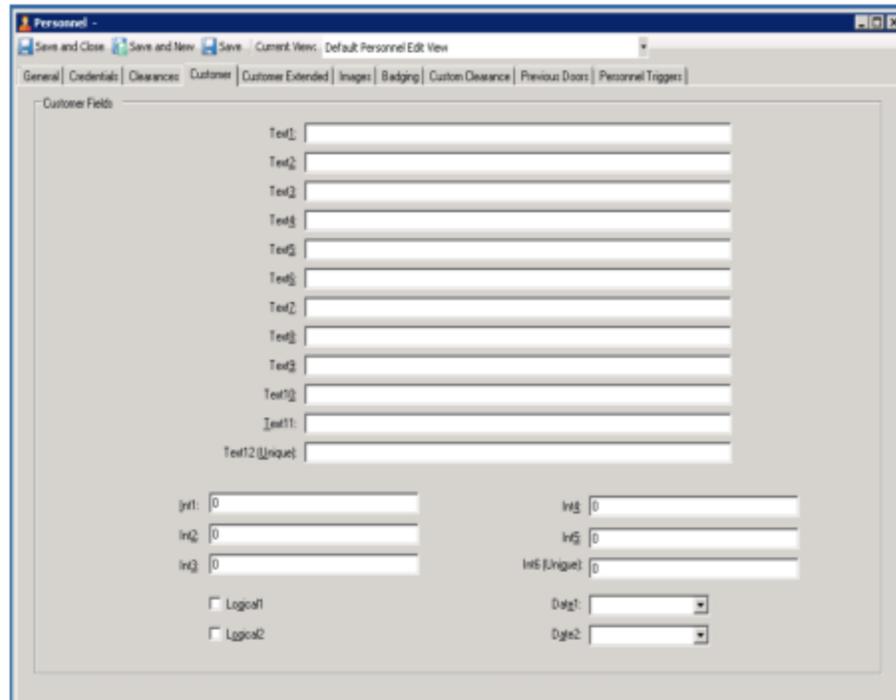
Personnel Customer Tab

The Personnel **Customer** Tab (shown in [Figure 12](#) on [Page 67](#)) displays 22 Customer fields that can be renamed on the Customer tab. These fields are not used directly by C•CURE 9000, but are reserved for customer use. These fields can be used in any way a user wishes. They can also be included on badges designed using the C•CURE ID Badge Designer.

See [Personnel Customer Tab Definitions](#) on [Page 68](#) for definitions of all fields and buttons on the Personnel Customer Tab.

- You can rename these fields using the Options and Tools Customer Field Labels editor. You can make these changes only if you have the appropriate Operator Privilege for **Customer Field Labels**. See the *C•CURE 9000 System Maintenance Guide* for more information.
- You can move, resize, and even remove these fields using the Personnel Views editor. You can make these changes only if you have the appropriate Operator Privilege for **Personnel Views**. See [Personnel Views Editor](#) on [Page 182](#) for more information.

Figure 12: Customer Tab



To Access the Personnel Customer Field Editor

1. In the navigation pane, click the **Options & Tools** button and select **Customer Field Labels**. The Customer Field Label editor opens.
2. In the **Database Field Name** column, scroll to the field whose label you want to edit. The default field labels correspond to the fields on the Personnel Customer tab.
3. In the Label column, type in the new field label.

4. Scroll down and modify any of the other text, integer, numeric value, logical, or date fields, as needed. Enter the new label in the Label column.
5. Click **Save and Close** to save the changes.

Personnel Customer Tab Definitions

The following fields and buttons shown in [Table 8](#) on [Page 68](#) are available on the Customer tab.

Table 8: Personnel Customer Tab Definitions

Field/Button	Description
Text1 - Text11	These fields are intended for personnel information such as department, address, city, and state. You can change the field labels using the Customer Field Label editor . The Text fields on this tab (Text1 - Text12) have a Maximum Length of 150 characters.
Text12 (Unique)	This field is required to have a unique text value for every record in the database. If two or more records have an identical value for Text12, an error message is displayed. You can change the field label using the Customer Field Label editor . If you migrate Personnel data from C•CURE 800/8000, unique text contained in Text6 on C•CURE 800/8000 is mapped to Text12 on C•CURE 9000.
Int1 - Int5	These fields are intended for numeric personnel information such as department number, salary, and age. You can change the field label using the Customer Field Label editor . The Integer fields (Int - Int6) have a minimum value of 0 and a maximum value of 9223372036854775807.
Int6 (Unique)	This field is required to have a unique numeric value for every record in the database. If two or more records have an identical value for Int6, an error message is displayed. You can change the field label using the Customer Field Label editor .
Logical1 - Logical2	Logical3 and Logical4 are boolean fields. You can use these fields for Yes/No value information such as whether a person is a full-time employee. You can change the field labels using the Customer Field Label editor . Click the check box to signify Yes or clear the check box to signify No .
Date1 - Date2	Date1 and Date2 are Date-formatted fields. You can use these two date fields to specify personnel information such as a starting date or a promotion date. You can change the field labels using the Customer Field Label editor . You can pick a value for these fields by clicking the down-arrow to open a Calendar control and choosing a date.

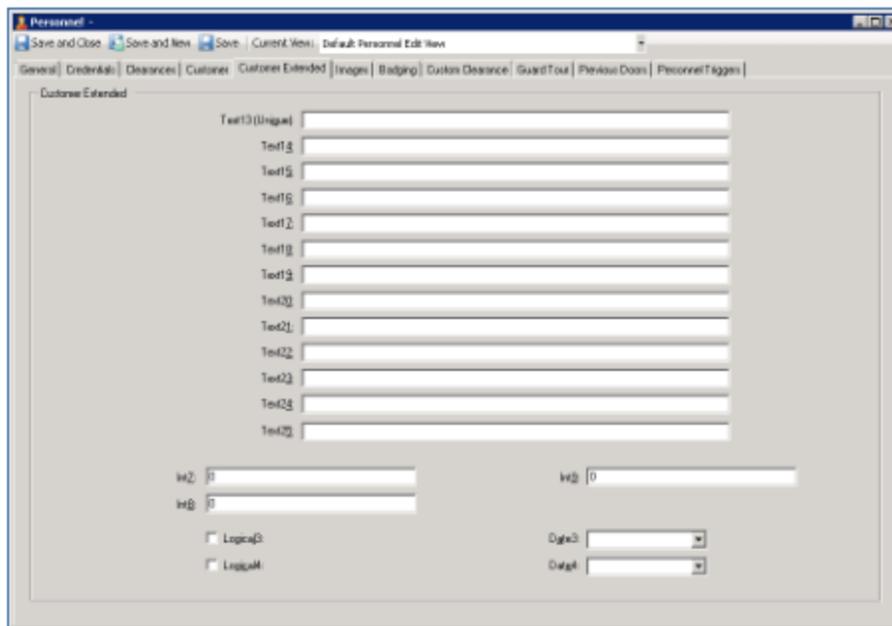
Personnel Customer Extended Tab

The Personnel **Customer Extended** Tab (shown in [Figure 13](#) on [Page 69](#)) displays 20 Customer fields that can be renamed on the Customer Extended tab. These fields are not used directly by C•CURE 9000, but are reserved for customer use. They can also be included on badges designed using the C•CURE ID Badge Designer.

See [Personnel Customer Extended Tab Definitions](#) on [Page 69](#) for definitions of all fields and buttons on the Personnel Customer Extended Tab.

- You can rename these fields using the Options and Tools Customer Field Labels editor. You can make these changes only if you have the appropriate Operator Privilege for **Customer Field Labels**. See the *C•CURE 9000 System Maintenance Guide* for more information.
- You can move, resize, and even remove these fields using the Personnel Views editor. You can make these changes only if you have the appropriate Operator Privilege for **Personnel Views**. See [Personnel Views Editor](#) on [Page 182](#) for more information.

Figure 13: Customer Extended Tab



Personnel Customer Extended Tab Definitions

The following fields and buttons shown in [Table 9](#) on [Page 69](#) are available on the Customer Extended tab.

Table 9: Personnel Customer Extended Tab Definitions

Field/Button	Description
Text13 (Unique)	This field is required to have a unique text value for every record in the database. If two or more records have an identical value for Text13, an error message is displayed. You can change the field label using the Customer Field Label editor . If you migrate Personnel data from C•CURE 800/8000, unique text contained in Text7 on C•CURE 800/8000 is mapped to Text13 on C•CURE 9000.

Personnel Customer Extended Tab Definitions (continued)

Field/Button	Description
Text14 - Text25	These fields are intended for personnel information such as department, address, city, and state. You can change the field labels using the Customer Field Label editor . The Text fields on this tab (Text13 - Text25) have a Maximum Length of 150 characters.
Int7 - Int9	These fields are intended for numeric personnel information such as department number, salary, and age. You can change the field label using the Customer Field Label editor . The Integer fields (Int7 - int9) have a minimum value of 0 and a maximum value of 9223372036854775807.
Logical3 - Logical4	Logical3 and Logical4 are boolean fields. You can use these fields for Yes/No value information such as whether a person is a full-time employee. You can change the field labels using the Customer Field Label editor . Click the check box to signify Yes or clear the check box to signify No .
Date3 - Date4	Date3 and Date4 are Date-formatted fields. You can use these two date fields to specify personnel information such as a starting date or a promotion date. You can change the field labels using the Customer Field Label editor . You can pick a value for these fields by clicking the down-arrow to open a Calendar control and choosing a date.

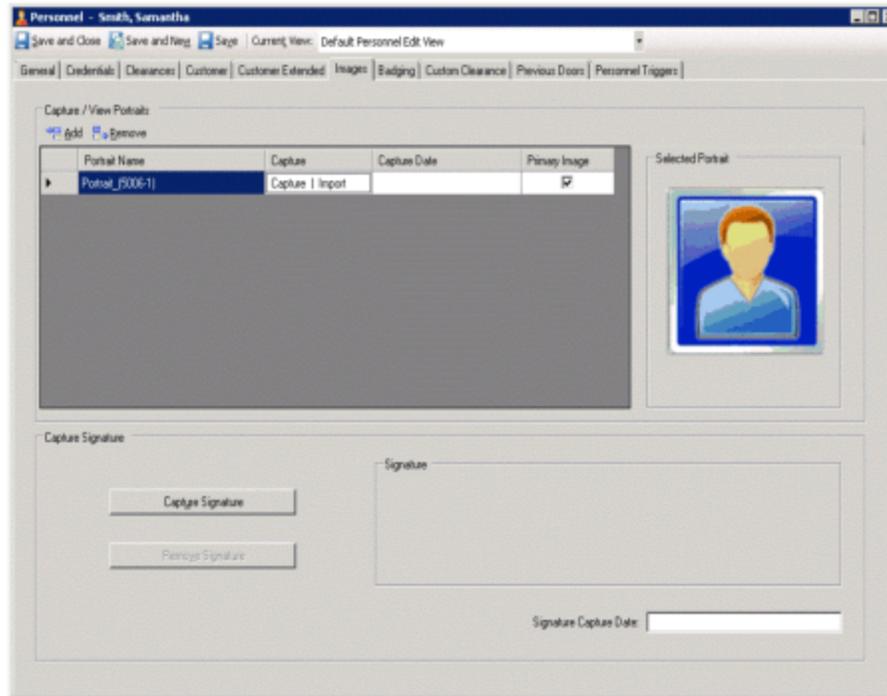
Personnel Images Tab

The **Personnel Images** tab lets you include badge portraits and captured signatures in the Personnel record. These images are stored in the C•CURE 9000 database.

See [Personnel Images Tab Definitions](#) on [Page 71](#) for definitions of all fields and buttons on the **Personnel Images** tab. [Figure 14](#) on [Page 71](#) shows an example of the **Personnel Images** tab.

See [Images Tab Tasks](#) on [Page 72](#) for tasks you can perform from the Images tab.

Figure 14: Personnel Images Tab



Personnel Images Tab Definitions

The fields and buttons on the Personnel Images tab are shown in [Table 10](#) on [Page 71](#).

Table 10: Personnel Images Tab Definitions

Field/Button	Description
Portrait Name	Type in a name for the image that you will capture, or accept the default name the system assigns.
Capture	Click this button to capture a new portrait image (if an image has not yet been captured), or replace an existing image.
Capture Import	(Appears only if you chose Enable both device capture and import from file during C•CURE ID Portrait Configuration.) <ul style="list-style-type: none"> Click the left side of this button to Capture an Image from a capture device. Click the right side of this button to Import an Image from a file.
Capture Date	Displays the capture date and time for each Portrait image.

Personnel Images Tab Definitions (continued)

Field/Button	Description
Primary Image	Identify one of the captured images as the primary image for this personnel record. You can click in this field to change the primary image.
Capture Signature	Click this button to capture a signature image for this personnel record. Depending on your Badge setup settings, a dialog box opens to allow you to capture a signature from a capture device, or to import an image file from disk. If a signature capture image already exists in this personnel record, using Capture Signature overwrites that image.
Remove Signature	Click this button to remove a captured signature image from this personnel record. The signature image is removed immediately when you click this button.
Signature Capture Date	Displays the date that the current captured signature was added to this personnel record.
Add	Click this button to add a new image. Then click the Capture button to choose an image. <ul style="list-style-type: none"> • If you have specified Import from file in Options & Tools>Badge Setup, you can select an image file from the available drives in the Import Image dialog box that appears. • If you have specified TWAIN as the capture device in Options & Tools>Badge Setup, a dialog box appears to let you select a TWAIN device for the image capture.
Remove	Select a row in the Images table by clicking the row selector  , then click Remove to delete the selected image(s). A dialog box appears asking you to confirm the removal. Click Yes and the selected images are removed.

Images Tab Tasks

You can perform the following tasks from the **Personnel Images** tab.

- [Adding an Image to a Personnel Record on Page 72](#)
- [Removing an Image from a Personnel Record on Page 75](#)
- [Adding a Signature to a Personnel Record on Page 75](#)
- [Removing a Signature from a Personnel Record on Page 75](#)

Adding an Image to a Personnel Record

You use the **Capture** button to add an image to a Personnel Record.

The **Capture** button is configured during Badge Setup to either allow you to import a file or to capture a photo image via a camera. See the *C•CURE 9000 C•CURE ID User Guide* for more information on Badge Setup and on capturing images.

NOTE

During Badge Setup, you can choose to display a combined **Capture** and **Import** button on the Personnel Imaging tab. If you select this option, the button appears as **Capture | Importe**.

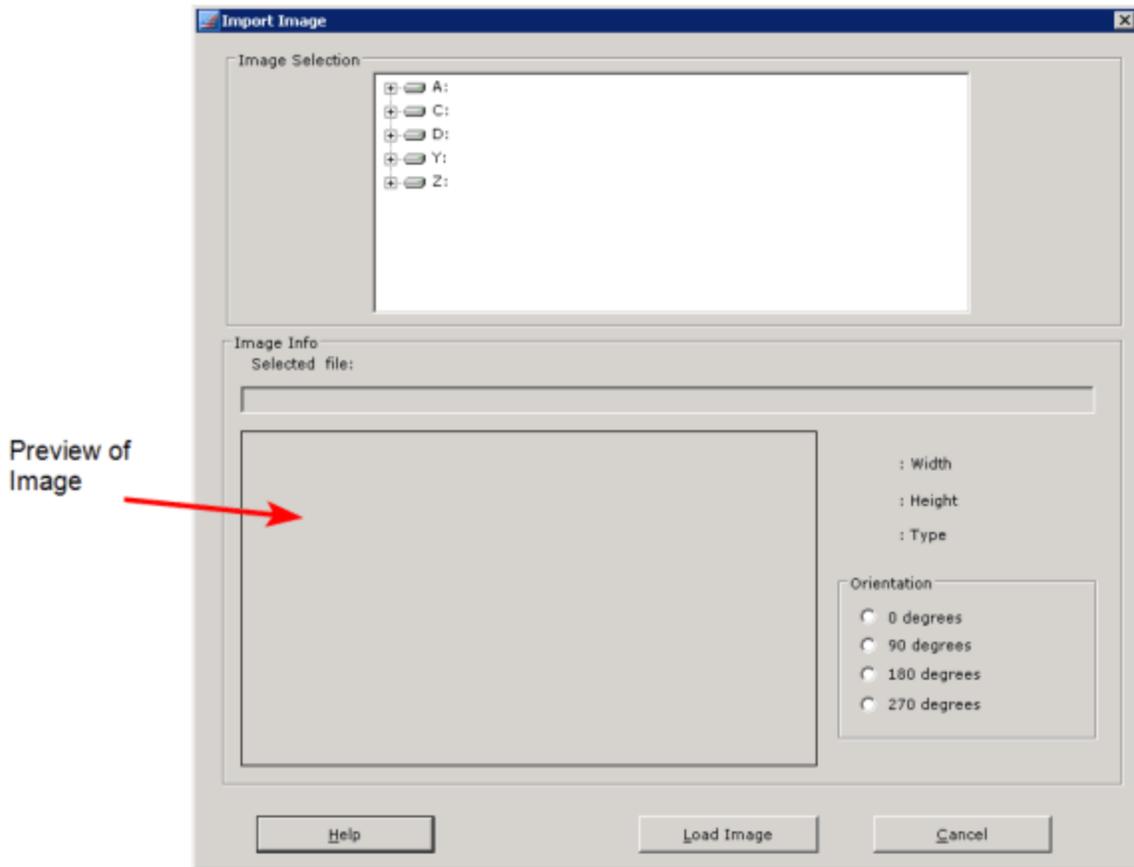
- If you click the left side of the button, you can Capture an Image.
 - If you click the right side of the button, you can Import an Image.
- If your system is set up to import an image from disk, see [To Import an Image into a Personnel Record on Page 73](#).

- If your system is set up to Capture an image from a camera, see [To Capture an Image with a Camera and Add it to a Personnel Record](#) on [Page 74](#).

To Import an Image into a Personnel Record

1. From the **Images** tab of the Personnel Editor, click **Add**. A new row appears in the Capture/View Portraits table.
2. Click **Capture** (or the **Import** side of the **Capture | Import** button) in the new row. The **Import Image** dialog box shown in [Figure 15](#) on [Page 73](#) appears.

Figure 15: Import Image Dialog Box



3. Click the **Image Selection** tree to navigate to the file you want to import.
4. Click the image file in the tree that you want to import; a preview of the image file appears.
5. Click one of the **Orientation** options to rotate the image, if desired.
6. Click **Load Image**. The **Save Image** dialog box ([Figure 17](#) on [Page 74](#)) appears.
7. Use the cropping selection box to select the portion of the image to import, if you wish.
8. Resize the cropping selection box by clicking and dragging any of the box's corners, if you wish.
9. Click **Save** to save the image. The image appears in the Image area on the **Images** tab, and the system assigns a Portrait Name and Capture Date.
10. Modify the system-assigned **Portrait Name** by editing that field in the Table, if you wish.

- If you want this image to be the Primary Image (that displays on Dynamic Views and at the Monitoring Station) for this person, select in the **Primary Image** field.
- Click **Add** to save the imported image.

To Capture an Image with a Camera and Add it to a Personnel Record

- From the **Images** tab of the Personnel Editor, click **Add**. A new row appears in the **Capture/View Portraits** table.
- Click **Capture** (or the **Capture** side of the **Capture | Import** button) in the new row. The **Video Capture** dialog box, shown in [Figure 16](#) on [Page 74](#), opens to let you freeze and save a picture.

Figure 16: Video Capture Dialog



- Frame your subject in the **Video Capture** dialog box by moving the camera or by using the cursor.
- Make any adjustments using the controls on the dialog box, and click **Accept** to capture the image. The **Save Image** dialog box (see [Figure 17](#) on [Page 74](#)) opens so that you can make adjustments to the captured image.

Figure 17: Save Image Dialog Box



- Use the mouse (click and drag) to move the cropping selection box (dotted line rectangle) with the mouse pointer to select the portion of the image to import as a portrait, if you wish. You can this box anywhere on the captured image.
- Use the cropping Selection box sizing handles to change the dimensions of the image as required, if you wish.

7. Use the brightness and contrast controls to change the appearance of the image. Other camera features may be available, such as Backlighting, Zoom In/Out, or Flash On/Off. These controls are described in the *C•CURE 90000 C•CURE ID User Guide*.
8. When you have selected the portion of the image you want to save, and you have performed all adjustments, click **Save** to save the image.
The image appears in the Image area on the **Images** tab, and the system assigns a Portrait Name and Capture Date.
9. Modify the system-assigned **Portrait Name** by editing that field in the Table, if you wish.
10. If you want this image to be the Primary Image (that displays on Dynamic Views and at the Monitoring Station) for this person, select in the **Primary Image** field.
11. Click **Save and Close** to save the image.

Removing an Image from a Personnel Record

To Remove an Image from a Personnel Record

1. From the **Images** tab of the Personnel Editor, click the row selector  for the image you wish to delete.
2. Click **Remove**. A confirmation dialog box appears asking you to confirm the deletion. Click **Yes** to delete the image, or **No** to cancel the deletion.

Adding a Signature to a Personnel Record

To Add a Signature to a Personnel Record

1. From the **Images** tab of the Personnel Editor, click **Capture Signature**.
2. The **Signature Capture** dialog box that you configured during Badge Setup (on the Options and Tools pane) appears.
 - Signature Import: Click the **Image Selection** tree to navigate to the file you want to import and then click the signature file you want to import
 - Signature Capture: Follow the signature capture instructions for the signature capture device you are using.
3. Click **OK** to capture the signature. The **Save Image** dialog box appears.
4. Use the cropping selection box to select the portion of the signature to import. You can resize the cropping selection box by clicking and dragging any of the box's corners.
5. Click **Save** to save the signature. The signature appears in the Signature area on the **Images** tab.
6. Click **Save and Close** to save the imported signature.

Removing a Signature from a Personnel Record

When you remove a signature by clicking **Remove Signature**, the signature is removed immediately. If you change your mind and want to undo the removal of the signature, click  and when the dialog box appears asking if you want to save changes before exiting, answer **No**. When you open the Personnel Editor again, the signature is restored.

To Remove a Signature from a Personnel Record

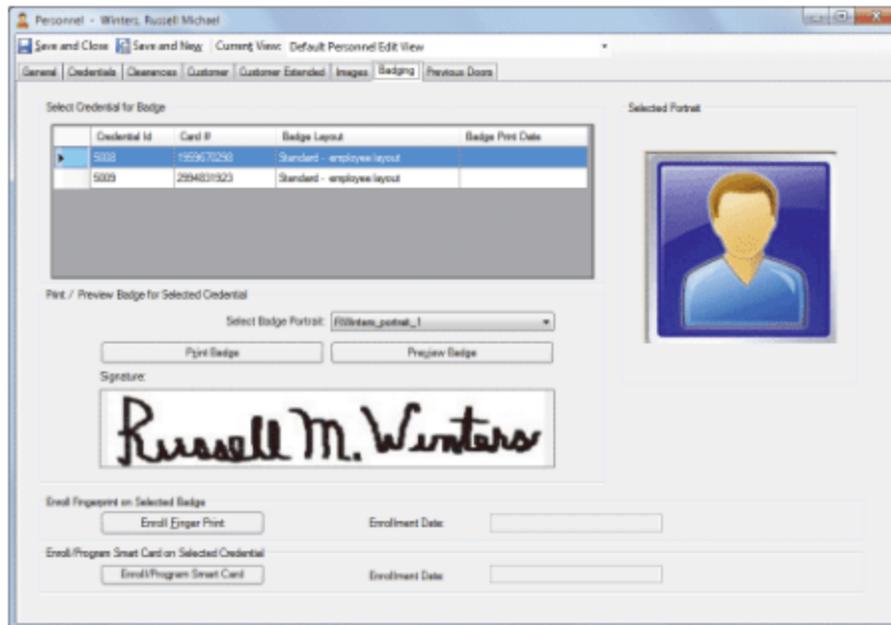
1. From the **Images** tab of the Personnel Editor, click **Remove Signature**.
2. The signature is immediately removed.

Personnel Badging Tab

The **Personnel Badging** tab lets you select a portrait image for each badge access credential, enroll a fingerprint for a badge, preview a badge prior to printing, and print a badge to a badge printer.

See [Personnel Badging Tab Definitions](#) on [Page 77](#) for definitions of all fields and buttons on the Personnel Badging Tab. [Figure 18](#) on [Page 77](#) shows the **Personnel Badging** tab.

Figure 18: Personnel Badging Tab



Personnel Badging Tab Definitions

The fields and buttons on the Personnel Badging tab are shown in [Table 11](#) on [Page 77](#).

Table 11: Personnel Badging Tab Definitions

Field/Buttons	Description
Credential Id	The system-assigned ID number for this credential, from the Personnel Credentials tab.
Card #	The card number for the selected credential, from the Personnel Credentials tab.
Badge Layout	Displays the Badge Layout selected for this credential on the Personnel Credentials tab. Badge Layouts are created using the C•CURE ID Badge Designer.
Badge Print Date	Displays the last date that the credential (badge) was printed.
Select Badge Portrait	This drop-down list lets you select a badge portrait from the badge portraits stored in the Personnel database. This portrait is used for previewing and printing the currently selected credential. You can add portraits to the personnel record using the Personnel Badging tab.

Personnel Badging Tab Definitions (continued)

Field/Buttons	Description
Print Badge	Click this button to print the selected badge. Depending on your Badge Setup Printer Settings, the badge either prints automatically or is added to the Batch Print Queue. If the badge is queued, the C•CURE ID Batch Print Manager dialog box opens to allow you to manage the print queue. From this dialog box you can choose to print this badge and any other badges currently in the queue.
Preview Badge	Click this button to view a print preview of the person's badge. A C•CURE ID Print Preview dialog box opens to display the badge. Click to close the preview dialog box.
Enroll Finger Print	Click this button to enroll fingerprints onto cards via a Bioscrypt reader. The Fingerprint Capture dialog box appears, and prompts guide you through the enrollment process.
Enrollment Date	A read-only field that displays the Date/Time that a fingerprint was enrolled for the selected credential.
Enroll/Program Smart Card	Click this button to enroll or program smart cards via a Smart Card encoder. Depending upon the configuration settings for the encoder, your Smart Card is enrolled/programmed or added to the Batch Print Manager queue.
Enrollment Date	A read-only field that displays the Date/Time that a Smart Card was enrolled and/or programmed for the selected credential.

Badging Tab Tasks

- [Selecting a Badge Portrait on Page 78](#)
- [Enrolling a Fingerprint on Page 78](#)
- [Previewing a Badge on Page 79](#)
- [Printing a Badge on Page 80](#)

Selecting a Badge Portrait

For each badge credential you created on the **Personnel Credentials** tab, you can select a badge portrait from those you imported on the **Personnel Images** tab.

To Select a Badge Portrait

1. From the **Personnel Badging** tab, select a credential from the **Select Credential for Badge** table.
2. Use the drop-down list in the **Select Badge Portrait** field to select a portrait for the credential. (If the drop-down list is empty, you must add an image to the Personnel record using the **Personnel Imaging** tab.)
3. Click **Preview Badge** to see a preview of the badge credential with the portrait in place, or click **Print Badge** to print this badge credential.

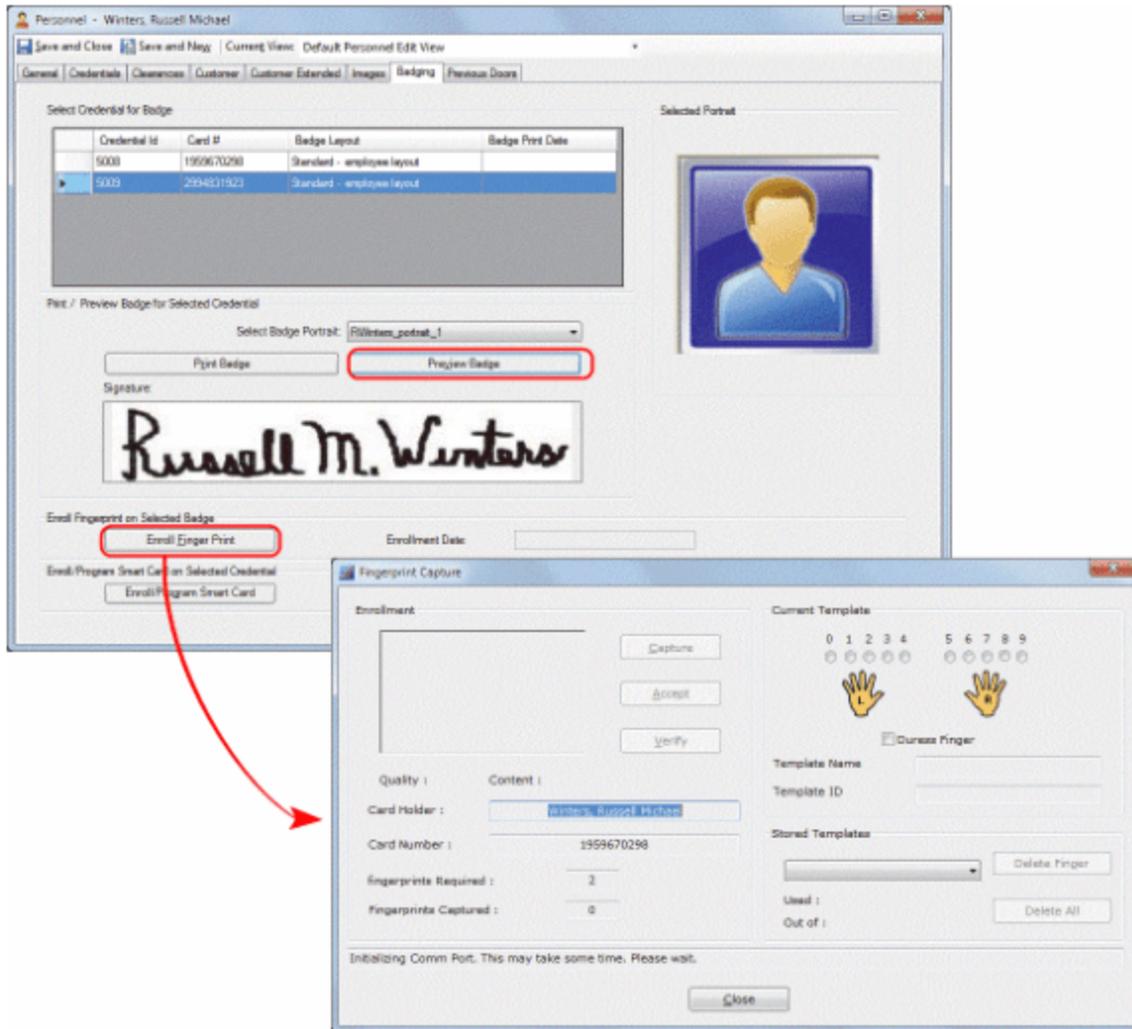
Enrolling a Fingerprint

If you have used Badge Setup to configure fingerprint capture, you can use the **Enroll Finger Print** button to perform fingerprint enrollment for badge credentials. If you have not enabled fingerprint capture in Badge Setup, the **Enroll Finger Print** button is unavailable.

To Enroll a Fingerprint

1. From the **Personnel Badging** tab, select a credential from the **Select Credential for Badge** table.
2. Click **Enroll Finger Print**. The **Fingerprint Capture** dialog box (Figure 19 on Page 79) appears.

Figure 19: Fingerprint Capture Dialog Box



3. Capture one or more fingerprints using the **Capture** button. For more information on using this dialog box, click F1 to view the C•CURE ID Help.

Previewing a Badge

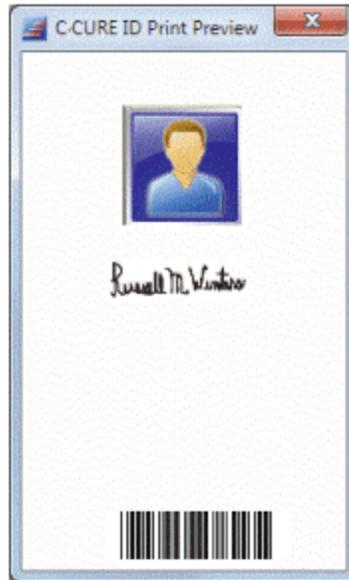
You can view a preview of a badge credential to determine if it looks correct before you print it.

To Preview a Badge

1. From the **Personnel Badging** tab, select a credential from the **Select Credential for Badge** table.

2. Click **Preview Badge**. The **C•CURE ID Print Preview** dialog box (Figure 20 on Page 80) appears, showing you a full-size preview of the badge.

Figure 20: Preview Badge Dialog Box



3. Click  to close the preview dialog box.

Printing a Badge

You can send a badge credential to the printer you configured during Badge Setup.

NOTE

If any data in the personnel record has been changed but not yet saved, you must save the changes before the badge can be printed. This feature is intended to prevent the printing of a badge with data that has not been audited

To Print a Badge

1. From the **Personnel Badging** tab, select a credential from the **Select Credential for Badge** table.
2. Click **Print Badge**. Depending on the Printing and Print Queue options configured using Badge Setup, the badge is either sent to the printer, or added to the C•CURE ID Print Queue. In the latter case, the **C•CURE ID Print Queue Manager** dialog box appears for you to decide how and when to print the badge.

Enrolling/Programming a Smart Card

If you have set up a badge printer or Smart Card encoder device using **C•CURE ID Badge Setup>SmartCard** settings, you can use the **Enroll/Prog. Smart Card** button to program MIFARE Smart Cards. Refer to the C•CURE 9000 C•CURE ID for instructions for configuring and performing Smart Card programming and enrolling.

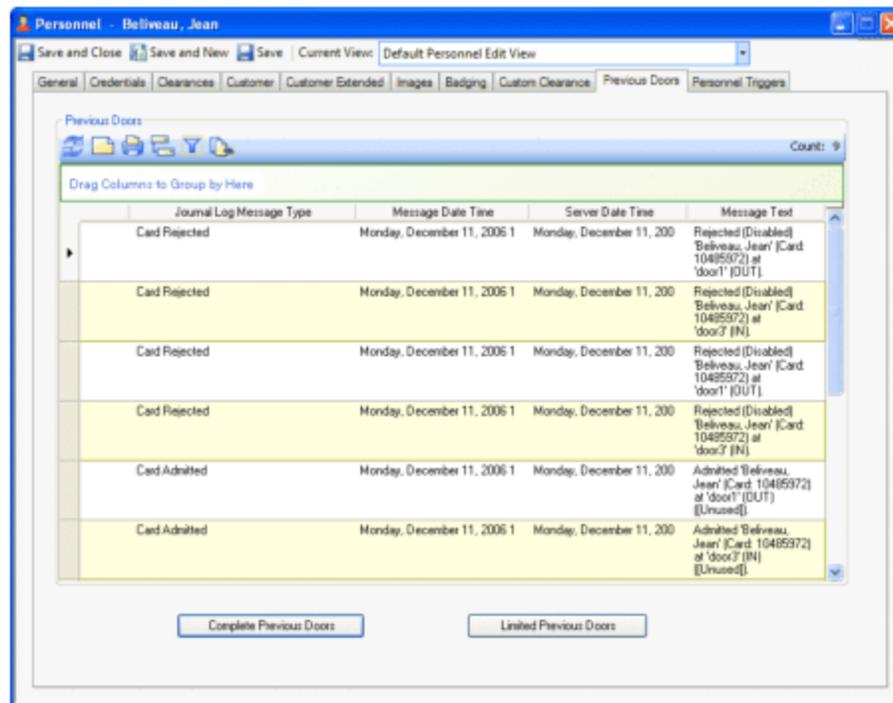
Personnel Previous Doors Tab

The **Personnel Previous Doors** tab allows users to display a Journal replay of the accesses and rejects for a person.

The replay starts with the most recent accesses first, and goes back as far as the journal is configured to store. (The Journal System Variable setting for **Number Of Days To Store** determines how many days of journal activity are stored. For information about System Variables see the *C•CURE 9000 System Maintenance Guide*”.

The list displays as a Dynamic View that you can sort, filter, group, and print. [Figure 21](#) on [Page 81](#) shows the Personnel Previous Doors tab.

Figure 21: Personnel Previous Doors Tab



See [Personnel Previous Doors Definitions](#) on [Page 81](#) for definitions of all fields and buttons on the **Personnel Previous Doors** Tab.

Personnel Previous Doors Definitions

The fields and buttons on the Personnel Previous Doors tab are explained below.

Previous Doors List

This list displays previous access attempts by this person for the journal storage period (the setting for the Personnel System Variable **Maximum Days in Journal**). The list shows the Message Type, Message Date and Time, the Server Date and Time, and the text of the message.

Complete Previous Doors

Click this button to display **all** of the latest access messages, up to the number of days specified in the Personnel System Variable **Maximum Days in Journal**).

Limited Previous Doors

Click this button to display a specified number of access messages. This number is set in the **Previous Doors Replay Number** in System Variables. The default value is three messages.

Previous Doors Tab Tasks

- [Viewing a Complete Previous Doors List on Page 82](#)
- [Viewing a Limited Previous Doors List on Page 82](#)

Viewing a Complete Previous Doors List

This view shows all the latest access messages in the journal for the number of days specified in the Personnel System Variable **Maximum Days in Journal**.

To View a Complete Previous Doors List

1. From the **Previous Doors** tab, click **Complete Previous Doors**.
2. A Dynamic View appears, listing all of the latest access messages in the Journal for this person.

Viewing a Limited Previous Doors List

This view shows the most recent access messages, up to the number set in the **Previous Doors Replay Number** in System Variables. (The default value is three messages.)

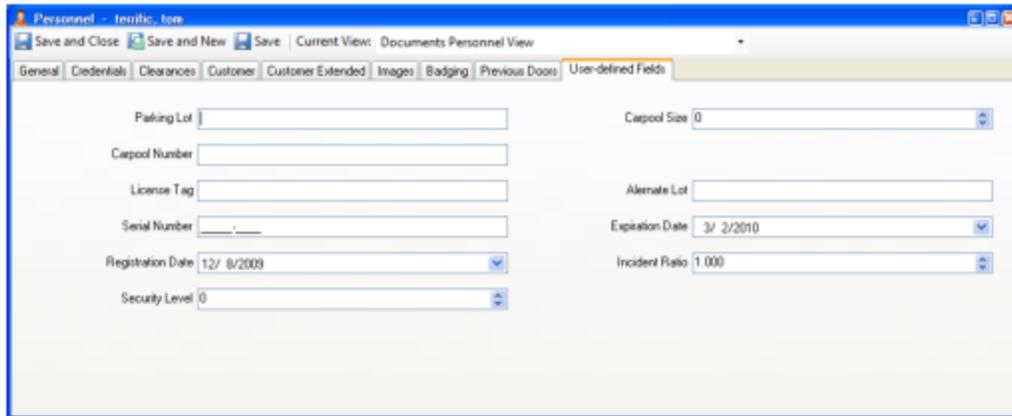
To View a Limited Previous Doors List

1. From the **Previous Doors** tab, click **Limited Previous Doors**.
2. A Dynamic View appears, listing the most recent access messages up to the number set in the **Previous Doors Replay Number** in System Variables.

Personnel User-defined Fields Tab

When a C•CURE 9000 Administrator creates a new Personnel View, a new tab is added to the Personnel View. This tab is called User-defined Fields, and it lists by default all of the User-defined Fields that existed at the time the View was created. [Figure 22](#) on [Page 83](#) shows an example of a User-defined Fields tab with a few User-defined fields.

Figure 22: Example User-defined Fields Tab



The appearance of this tab (and others in the View) may differ from this example if the Administrator performs subsequent editing of the Personnel View. An Administrator can move fields, add additional fields, hide existing fields, rename or remove the User-defined Fields tab, or create an entirely new tab for the User-defined fields.

For more information about User-defined Fields, see the chapter on User-defined Fields in the C•CURE 9000 Software Configuration Guide.

Personnel Custom Clearance Tab

The **Personnel Custom Clearance** Tab lets you assign Custom Clearances to a person.

'Custom' Clearances differ from regular 'Common' Clearances because they allow you to associate individual Clearance Items with a specific person. This lets you give access to/exclusion from Doors/Door Groups and Elevators/Elevator Groups **uniquely** per person.

You can assign only one Clearance Item (either a Door/Door Group or an Elevator/Elevator Group) to a Custom Clearance; but you can assign multiple Custom Clearances to individual Personnel.

NOTE

Custom Clearances are supported only on the iSTAR controller and apC Panels.

The **Personnel Custom Clearance** Tab itself has two tabs:

- Doors
- Elevators

See [Personnel Custom Clearance Tab Definitions](#) on [Page 85](#) for definitions of all fields and buttons on the **Personnel Custom Clearance** tab. [Figure 23](#) on [Page 85](#) shows the **Personnel Custom Clearance** tab with the **Doors** tab displayed. [Figure 24](#) on [Page 85](#) shows the **Personnel Custom Clearance** tab with the **Elevators** tab displayed.

Custom Clearances in an Enterprise Environment

In an Enterprise Environment, although Custom Clearances relate to Doors/Elevators that are specific to a particular SAS, assigning Custom Clearances works as follows:

- Custom Clearances assigned to a Global Personnel record are always global.
- Custom Clearances assigned to a Local Personnel record are always local.

If the MAS is offline, you can add the same Custom Clearance at both the MAS and SAS. Once the MAS is back online, only one Custom Clearance should remain in the database.

Figure 23: Personnel Custom Clearance Tab - Doors Tab

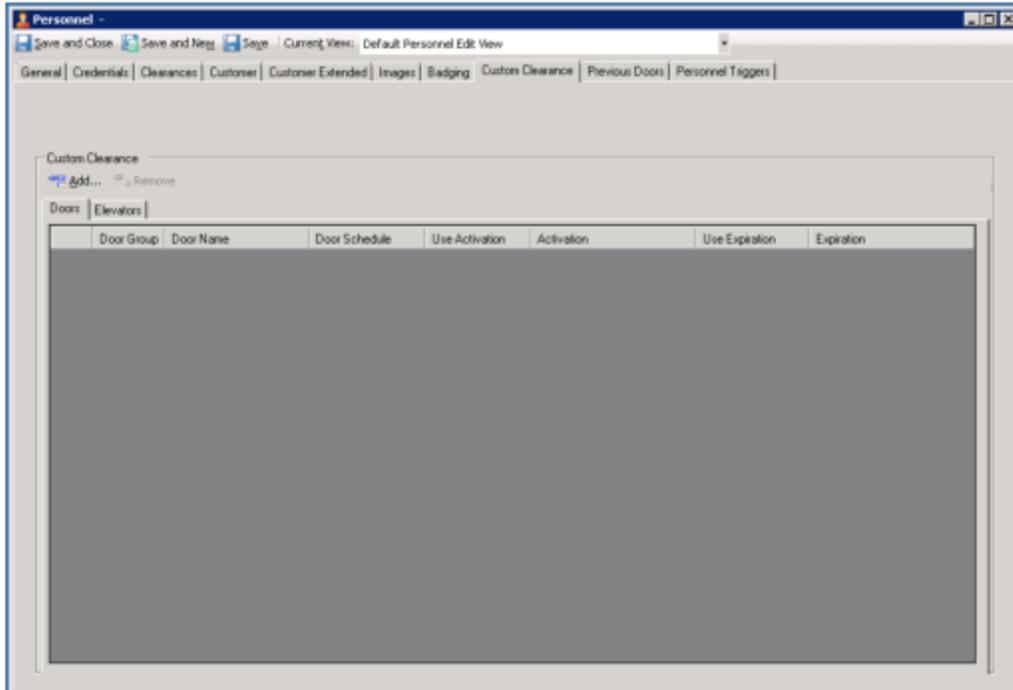
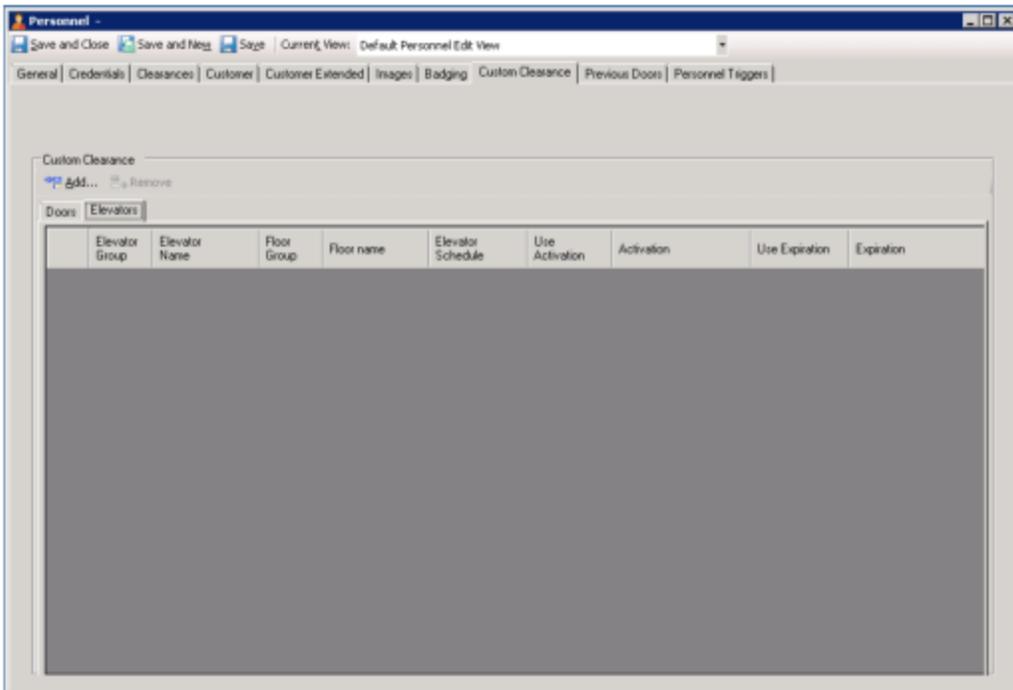


Figure 24: Personnel Custom Clearance Tab - Elevators Tab



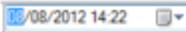
Personnel Custom Clearance Tab Definitions

The fields and buttons on the Personnel Custom Clearance tab are shown in [Table 12 on Page 86](#).

Table 12: Personnel Custom Clearance Tab Definitions

Field/Button	Description
Custom Clearance	
Add	Click this button to associate a new Door/Door Group or Elevator/Elevator Group Custom Clearance item with this person.
Remove	Click this button to remove the selected Door/Door Group or Elevator/Elevator Group Custom Clearance item from this person.
Doors Tab	
Door Group	Click the check box to limit the objects in the selection dialog box that opens in the Door Name field to Door Groups only. (If this check box is unselected, the selection list includes single Doors only.)
Door Name	Click in this field, and then click <input type="button" value="..."/> to open a selection dialog box listing the available Doors, or Door Groups (depending on whether or not Door Group was selected in the first field). Select a Door or Door Group to add that object to the Custom Clearance.
Schedule	Click in this field, and then click <input type="button" value="..."/> to open a selection dialog box listing the available Schedules. Select a Schedule to add that Schedule to the Custom Clearance.
Use Activation	Click to select this check box to enable the date/time in the Activation field and set the date on which this Custom Clearance becomes active . (The Custom Clearance does not allow access before the date you set.)
Activation	Click in this field to display a calendar icon with a down-arrow <input type="text" value="08/08/2012 14:22"/> and then click the down-arrow to pick the date on which this Custom Clearance becomes active . (You can also enter the date/time manually.)
Use Expiration	Click to select this check box to enable the date/time in the Expiration field and set the date on which this Custom Clearance becomes inactive . (The Custom Clearance does not allow access after the date you set.)
Expiration	Click in this field to display a calendar icon with a down-arrow <input type="text" value="08/08/2012 14:22"/> and then click the down-arrow to pick the date on which this Custom Clearance becomes inactive . (You can also enter the date/time manually.)
Elevators Tab	
Elevator Group	Click the check box to limit the objects in the selection dialog box that opens in the Elevator Name field to Elevator Groups only. (If this check box is unselected, the selection list includes single Elevators only.)
Elevator Name	Click in this field, and then click <input type="button" value="..."/> to open a selection dialog box listing the available Elevators, or Elevator Groups (depending on whether or not Elevator Group was selected in the first field). Select an Elevator or Elevator Group to add that object to the Custom Clearance.
Floor Group	Click the check box to limit the objects in the selection dialog box that opens in the Floor Name field to Floor Groups only. (If this check box is unselected, the selection list includes single Floors only.)
Floor Name	Click in this field, and then click <input type="button" value="..."/> to open a selection dialog box listing the available Floors, or Floor Groups (depending on whether or not Floor Group was selected in the first field). Select a Floor or Floor Group to add that object to the Custom Clearance.
Elevator Schedule	Click in this field, and then click <input type="button" value="..."/> to open a selection dialog box listing the available Schedules. Select a Schedule to add that Schedule to the Custom Clearance.
Use Activation	Click to select this check box to enable the date/time in the Activation field and set the date on which this Custom Clearance becomes active . (The Custom Clearance does not allow access before the date you set.)

Personnel Custom Clearance Tab Definitions (continued)

Field/Button	Description
Activation	Click in this field to display a calendar icon with a down-arrow  , and then click the down-arrow to pick the date on which this Custom Clearance becomes active . (You can also enter the date/time manually.)
Use Expiration	Click to select this check box to enable the date/time in the Expiration field and set the date on which this Custom Clearance becomes inactive . (The Custom Clearance does not allow access after the date you set.)
Expiration	Click in this field to display a calendar icon with a down-arrow  , and then click the down-arrow to pick the date on which this Custom Clearance becomes inactive . (You can also enter the date/time manually.)

Custom Clearance Tab Tasks

You can perform the following tasks from the Custom Clearance tab:

- [Adding a Custom Clearance to Access Doors/Door Groups on Page 87.](#)
- [Removing a Custom Clearance for Doors/Door Groups on Page 88.](#)
- [Adding a Custom Clearance to Access Elevators/Elevator Groups on Page 89.](#)
- [Removing a Custom Clearance for Elevators/Elevator Groups on Page 90.](#)

In addition, you can have expired Custom Clearances removed from a person's record by creating an Event with a **Remove Expired Custom Clearance from Personnel** Action. For information, see [Removing an Expired Custom Clearance from a Personnel Record on Page 153](#)

NOTE

Whether or not you can assign Custom Clearances to a Personnel record, as well as the maximum number of Custom Clearances allowed, is set by the System Variable **Maximum Custom Clearances Per Person** in **System Variables** for Personnel. (The default value for this variable is 0 [zero], meaning that **no** Custom Clearances can be assigned to **any** Personnel record.)

If the **Maximum Custom Clearances Per Person** variable is set to zero, when you click **Add** on either the Custom Clearances Doors or Elevators tab, the following warning message appears:

To enable Custom Clearances the "Maximum number of Custom Clearances per person" item in the Personnel entry of the System Variables must be greater than 0.

For information about editing this System Variable, see the *C•CURE 9000 System Maintenance Guide*.

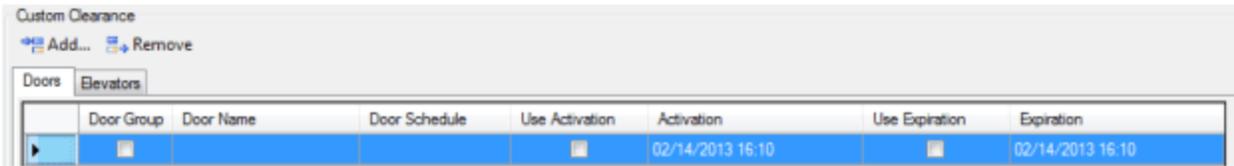
Adding a Custom Clearance to Access Doors/Door Groups

NOTE

In an Enterprise Environment if the MAS is offline, you can add the same Custom Clearance at both the MAS and SAS. Once the MAS is back online, only one Custom Clearance should remain in the database.

To Add Custom Clearances to Access Doors/Door Groups

1. From the **Custom Clearance** tab of the Personnel Editor with the **Doors** tab showing, click **Add** to create a new row, as shown in the following figure.



2. Click in the **Door Name** field to display and click this button. A selection list opens with the available Doors or Door Groups.
3. Click to display Door objects, to display Door Groups, or both to display both Doors and Door Groups.
4. Click the Door or Door Group you want to add to the Clearance. The selection list dialog box closes and the selection is added to the row. If you added a Group, the Door Group column in the table is selected (when you click in any field).
5. Click in the **Door Schedule** field to display and click this button. A selection list opens with the available Schedules.
6. Click a Schedule to add it to the row.
7. If you wish to set an optional date/time in the future when this Custom Clearance will become active and/or become inactive, click to select the **Use Activation** and/or **Use Expiration** check boxes. The current date/time (in 24-hour clock format) in the **Activation** and/or **Expiration** fields becomes available.
 - a. Click in the **Activation** and/or **Expiration** fields to display a calendar icon with a down-arrow and then click the down-arrow to display a calendar.
 - b. Scroll through the calendar to select the date on which you want the Custom Clearance to become active/expire for this person.

NOTE You can also click directly in the **Activation** and/or **Expiration** fields, without selecting the check box, to display and use the calendar. Once you have selected an **Activation/Expiration** date, the appropriate **Use Activation/Expiration** check box is automatically selected.

8. Click **Save and Close** to accept the selections you have made, adding this Custom Clearance for a Door/Door Group to the Person's record, and closing the record.
 - or -
 - Click **Save and New** to accept the selections you have made, adding this Custom Clearance for a Door/Door Group to the Person's record, and keeping the Personnel Editor open to add more Personnel.
 - or -
 - Click **Cancel** to discard your selections.

Removing a Custom Clearance for Doors/Door Groups

To Remove a Custom Clearance for Doors/Door Groups

1. From the **Custom Clearance** tab of the Personnel Editor with the **Doors** tab showing, click the row selector for the row in the Custom Clearances table that you wish to remove. The row is highlighted, and the row selector changes to .

2. Click **Remove**.
3. To save the **Custom Clearances** settings, click **Save and Close**

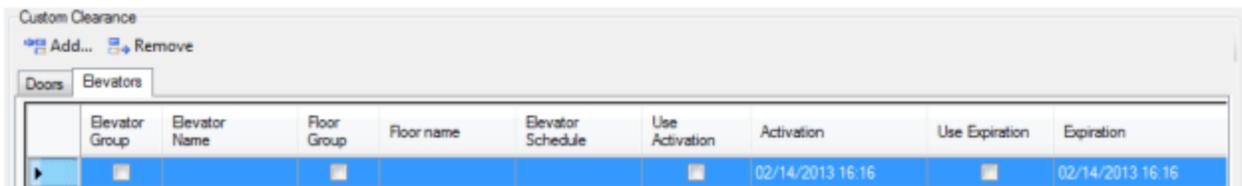
Adding a Custom Clearance to Access Elevators/Elevator Groups

NOTE

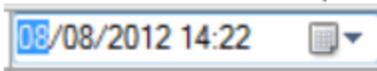
In an Enterprise Environment if the MAS is offline, you can add the same Custom Clearance at both the MAS and SAS. Once the MAS is back online, only one Custom Clearance should remain in the database.

To Add a Custom Clearance to Access Elevators/Elevator Groups

1. From the **Custom Clearance** tab of the Personnel Editor, click to display the **Elevators** tab and then click **Add** to create a new row, as shown in the following figure.



2. Click in the **Elevator Name** field to display  and click this button. A selection list opens with the available Elevators or Elevator Groups.
3. Click  to display Elevator objects,  to display Elevator Groups, or both to display both Elevators and Elevator Groups.
4. Click the Elevator or Elevator Group you want to add to the Custom Clearance. The selection list dialog box closes and the selection is added to the row. If you added a Group, the Elevator Group column in the table is selected (when you click in any field).
5. Click in the **Floor Name** field to display  and click this button. A selection list opens with the available Floors or Floor Groups.
6. Click  to display Floor objects,  to display Floor Groups, or both to display both Floors and Floor Groups.
7. Click the Floor or Floor Group you want to add to the Custom Clearance. The selection list dialog box closes and the selection is added to the row. If you added a Group, the Floor Group column in the table is selected (when you click in any field).
8. Click in the **Elevator Schedule** field to display  and click this button. A selection list opens with the available Schedules.
9. Click a Schedule to add it to the row.
10. If you wish to set an optional date/time in the future when this Custom Clearance will become active and/or become inactive, click to select the **Use Activation** and/or **Use Expiration** check boxes. The current date/time (in 24-hour clock format) in the **Activation** and/or **Expiration** fields becomes available.
 - a. Click in the **Activation** and/or **Expiration** fields to display a calendar icon with a down-arrow



and then click the down-arrow to display a calendar.

- b. Scroll through the calendar to select the date on which you want the Custom Clearance to become active/expire for this person.

NOTE

You can also click directly in the **Activation** and/or **Expiration** fields, without selecting the check box, to display and use the calendar. Once you have selected an **Activation/Expiration** date, the appropriate **Use Activation/Expiration** check box is automatically selected.

11. Click **Save and Close** to accept the selections you have made, adding this Custom Clearance for an Elevator/Elevator Group to the Person's record, and closing the record.

- or -

Click **Save and New** to accept the selections you have made, adding this Custom Clearance for an Elevator/Elevator Group to the Person's record, and keeping the Personnel Editor open to add more Personnel.

- or -

Click **Cancel** to discard your selections

Removing a Custom Clearance for Elevators/Elevator Groups

To Remove a Custom Clearance for Elevators/Elevator Groups

1. From the **Custom Clearance** tab of the Personnel Editor with the **Elevators** tab showing, click the row selector for the row in the Custom Clearances table that you wish to remove. The row is highlighted, and the row selector changes to .
2. Click **Remove**.
3. To save the **Custom Clearances** settings, click **Save and Close**

Personnel Documents Tab

The Personnel Documents tab allows you to assign a Document object—whether a URL, a PDF, or a TXT file, for example—to a Personnel Record and then to view that Document. The Document can be either a 'Shared' Document that was added to C•CURE 9000 on the Documents Editor, or a 'Private' Document imported from outside the system, such as a birth certificate or a diploma. (The size of the Document file must be smaller than 500K.)

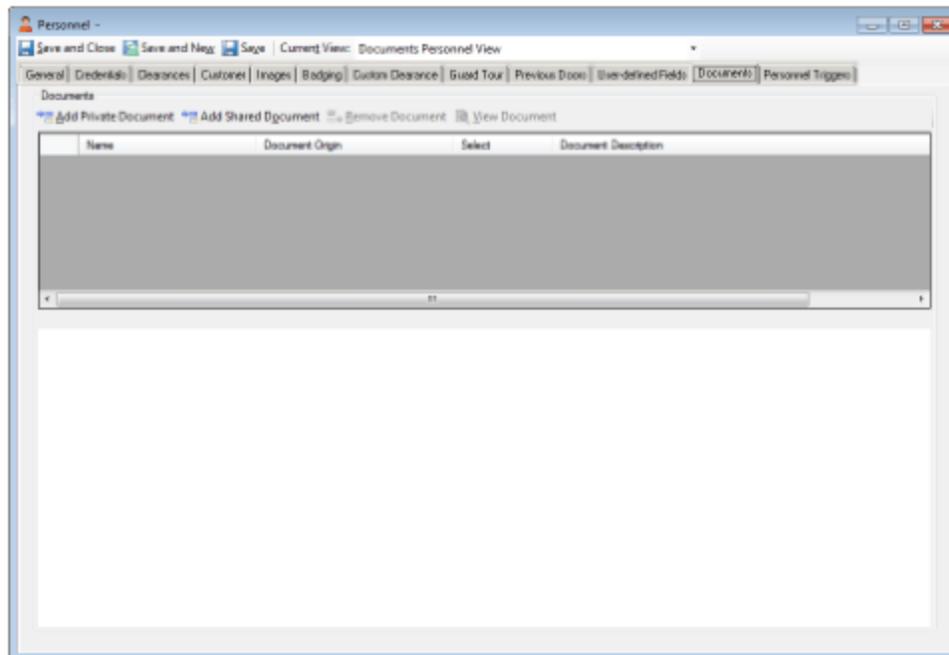
The system supports up to two documents per Personnel Record. (The maximum number that can be assigned is set by a Personnel System Variable. For information about System Variables, see the *C•CURE 9000 System Maintenance Guide*.)

This Documents tab is not automatically included in the default Personnel View. It is included in the "Personnel View with Portrait in Header" and is automatically added to any new Personnel View that you create. So if you wish to use the Documents tab for any Personnel Records, you must either select the aforementioned View or create a new Personnel View.

In order to add Documents to Personnel Records you must have **Read Permission** for Documents and **Add Documents Permission** for Personnel. To be able to view these Documents, you must have **Read Permission** for Documents and **View Documents Permission** for Personnel. For more information, see the Privileges chapter in the *C•CURE 9000 Software Configuration Guide*.

Figure 25 on Page 91 shows the Personnel Documents tab.

Figure 25: Personnel Documents Tab



- For the tasks you can perform from this tab, see the [Documents Tab Tasks](#) on Page 93
- For definitions of all fields and buttons on the Personnel Documents tab, see [Personnel Documents Tab Definitions](#) on Page 92.

Personnel Documents Tab Definitions

The fields and buttons on the Personnel Documents tab are shown in [Table 13](#) on [Page 92](#).

- Shared Documents are Documents added to the C•CURE 9000 system via the Document Editor that can be assigned to more than one Personnel Record or Event Record. For information, see the Document chapter in the *C•CURE 9000 Software Configuration Guide*.
- Private Documents are Documents, such as birth certificates, imported from outside C•CURE 9000 that can be attached to only one Personnel Record.

The number of Documents allowed per person is defined in **System Variables**. For information, see the *C•CURE 9000 System Maintenance Guide*.

Table 13: Personnel Documents Tab Definitions

Field/Button	Description
Name	<ul style="list-style-type: none"> • For a Shared Document, displays the name of the Document. • For a Private Document, displays the name of the Person whose record this is.
Document Origin	Displays 'file:/// ' followed by the Document's file name, such as TechStylegd.pdf or Door.gif.
Select	<ul style="list-style-type: none"> • Displays Select Document to click and select a Shared Document. • Displays Import File to click to import a Private Document.
Document Description	Displays the description of the Shared Document entered on the Document Editor.
Add Private Document	Click this button to add a new row to the Document tab, and then click Import File in the row to add a Private Document.
Import File	<p>Click this button to open a Windows file dialog box for locating the file you want to add as a Private Document to this Personnel Record.</p> <p>When you click the down-arrow on the Files of type field, three file types drop down that you can use to filter your options:</p> <ul style="list-style-type: none"> • Documents (*.pdf; *.txt) • Image Files (*.bmp; *.jpeg; *.gif; *.png) • All Files (*.*) <p>Select a file and click Open.</p> <p>(The document can be no larger than 500K or an error message displays.)</p>
Add Shared Document	Click this button to add a new row to the Document tab, and then click Select Document in the row to add a Shared Document.
Select Document	Click this button to open a selection box with the list of Documents in the system. Click a Document to select it.
Remove	Select the row of the Document you wish to remove and then click this button.
View Document	Select the row of the Document you wish to view and then click this button.

Personnel Documents Tab Definitions (continued)

Field/Button	Description
Content Area	<p>The Document you've selected to view displays in this area if it is a PDF, TXT, XML, or image file whose viewer is supported by the browser, or a URL.</p> <p>If the Document is another type of file, such as a DOC or XLS file, a File Download dialog box appears asking "Do you want to open or save this file?" When you click Open, the file appears in an external window in its native format. Image files whose viewer is not supported by the browser—TIF files, for example—open in whichever Graphics application format you have on your system—such as Paint Shop Pro or Paint. (Depending on how the application settings for opening in a browser are set, the DOC, PPT, or XLS file may open in the Content area.)</p> <p>NOTE: Although the external window has buttons that seemingly allow you to edit the file and save changes, these changes are not saved in the C•CURE 9000 database. To change a Document, you would have to edit it outside C•CURE 9000 and then re-import it.</p>

Documents Tab Tasks

You can perform the following tasks from the **Documents** tab:

- [Adding a Shared Document to a Personnel Record on Page 93.](#)
- [Adding a Private Document to a Personnel Record on Page 94.](#)
- [Removing a Document File from a Personnel Record on Page 94.](#)
- [Viewing a Document Belonging to a Personnel Record on Page 94.](#)

NOTE

The maximum number of Documents that you can assign to a Personnel record is set by the System Variable **Maximum Documents Per Person** in **System Variables** for Personnel. The default value is 2. If the value of the System Variable is decreased, existing Personnel records with Documents may not be able to add more Documents. The records' existing Documents will remain, but may become unavailable for viewing.

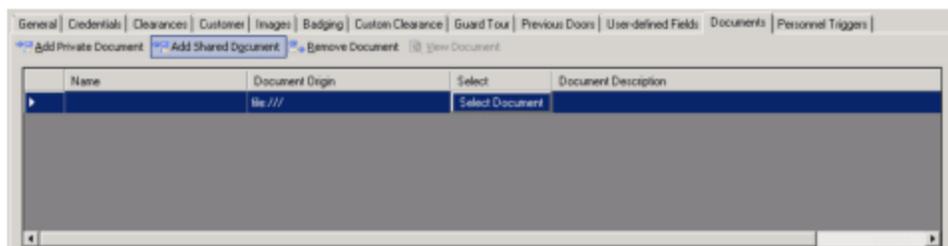
For information about System Variables, see the *C•CURE 9000 System Maintenance Guide*.
 You can only add Documents that are smaller than 500K.

Adding a Shared Document to a Personnel Record

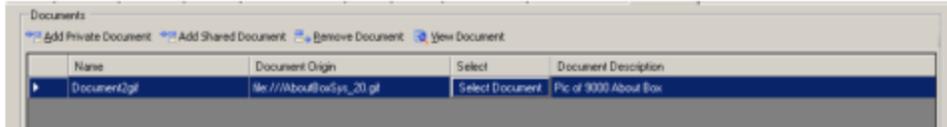
To Add a Shared Document

1. From the **Documents** tab of the Personnel Editor, click **Add Shared Document**. (If this button is unavailable, it might mean that the maximum number of Documents for this Personnel record are already configured, or that you do not have the requisite permissions.)

A new row appears in the table with **Select Document** in the **Select** field.



2. Click **Select Document**. A Selection box opens with a list of the Documents that have been added to the system on the Documents Editor.
3. Click a Document in the list to select it.
The Document is added to the row on the Personnel Documents tab.



4. To save the **Documents** setting, click **Save and Close** or **Save and New** on the Personnel Editor.

Adding a Private Document to a Personnel Record

To Add a Private Document

1. From the **Documents** tab of the Personnel Editor, click **Add Private Document**. (If this button is unavailable, it means that the maximum number of Documents for this Personnel record are already configured.)
A new row appears in the table with **Import File** in the **Select** field.
2. Click **Import File**. A standard Windows file dialog box, **Import Document from File**, opens.
The **Files of type** field on the bottom reads Documents (*.pdf; *.txt) which filters the files lists to only those two types. Clicking the down-arrow opens a drop-down with further file type filters: Image Files (*.bmp; *.jpeg; *.gif; *.png) and All Files (*.*)
3. Navigate to the file you want to add to this Personnel Record as a Document, select it, and click **Open**.
The Document is added to the list on the Personnel Documents tab.



4. To save the **Documents** setting, click **Save and Close** or **Save and New** on the Personnel Editor.

Removing a Document File from a Personnel Record

To Remove a Document

1. From the **Documents** tab of the Personnel Editor, click the row of the Document in the list that you wish to remove.
2. Click **Remove** to remove the selected Document from the list.
3. To save the **Documents** setting, click **Save and Close** or **Save and New** on the Personnel Editor.

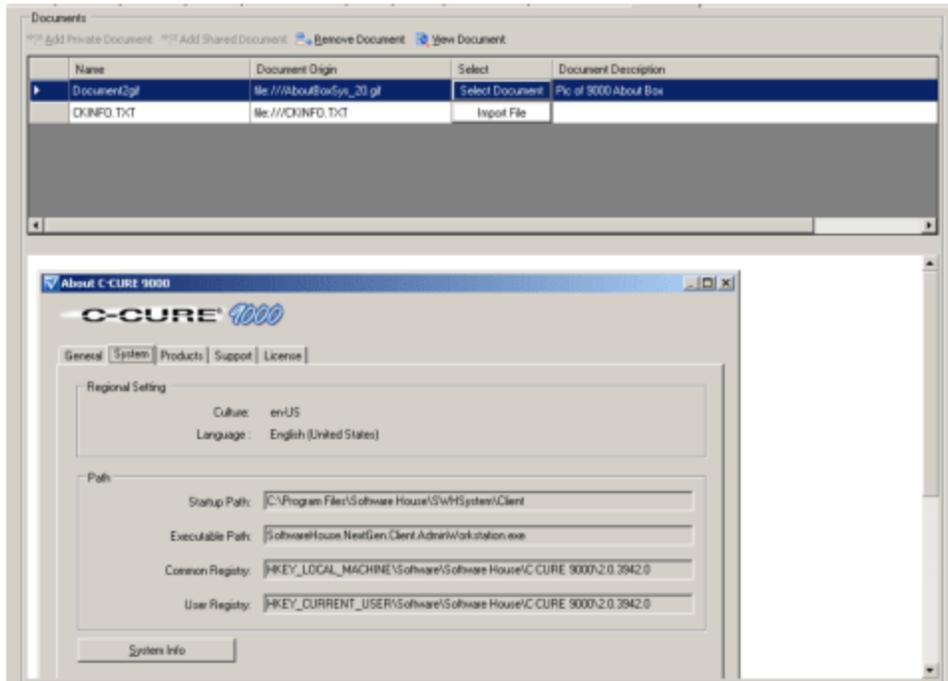
Viewing a Document Belonging to a Personnel Record

You can only view "Private Documents" added to a Personnel record on the Document tab of the Personnel Record to which it belongs. Private Documents cannot be displayed in a Dynamic View. Only Documents added to the system

with the Document Editor—"shared Documents"—can be viewed in a Dynamic View as well as on the Personnel Document tab. (See the C•CURE 9000 Personnel Guide.)

To View a Document

1. From the **Documents** tab of the Personnel Editor, click the row of the Document in the list that you wish to view.
2. Click **View Document** to view the selected Document.
 - If the selected Document is a URL or a PDF, TXT, XML, or an Image File whose Viewer is supported by the browser, it opens for viewing in the bottom half of the **Documents** tab.



- If the selected Document is another type of file, such as a Word DOC file or an Excel XLS file, a **File Download** dialog box appears asking "Do you want to open or save this file?" Click **Open** and the file appears in an external window in its native format with buttons that allow you to edit the file. Image files whose viewer is not supported by the browser, TIF files, for example, open in whichever Graphics application format you have on your system—such as Paint Shop Pro or Paint. (Depending on how the application settings for opening in a browser are set, the DOC, PPT, or XLS file may open in the Content area.)
3. When you are finished viewing the Document, you can close the Documents tab or the Personnel window.

NOTE Although you can seemingly edit and save the changes to a Document that opens for viewing in an external application, like Word, Excel, or Paint Shop Pro, such changes are not saved in the C•CURE 9000 system. (To make changes to any Document, you have to make them outside of C•CURE 9000 and then re-assign the Document within the system.)

Personnel Personnel Triggers Tab

The **Personnel Personnel Triggers** Tab lets you add and configure a trigger for a person that pulses an Event whenever a 'Card Admitted'/'Card Rejected' message is logged to the Journal for him/her at the defined Door/Elevator.

NOTE

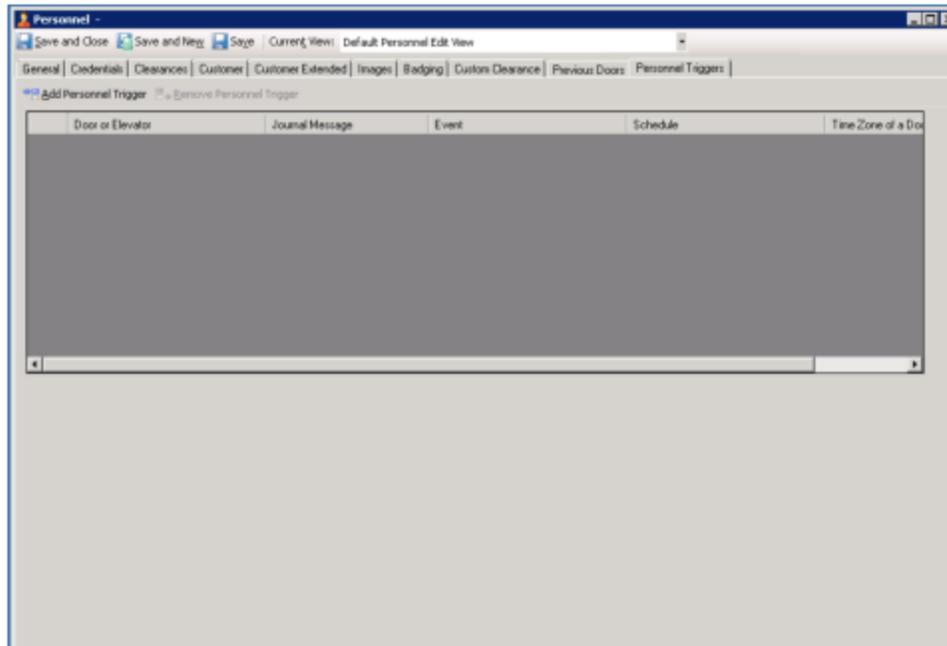
The Primary Object of the Card Admitted/Card Rejected journal message that kicks off the Event is the name of the individual for which the trigger is configured, while the Secondary Object is the Door/Elevator. The following example shows the format of the message

Example:

'Event "Event Name" is pulsed by "Card Admitted (or Rejected)" of Personnel "Person Name" at Door (or Elevator) "Door(Elevator) Name"'

See [Personnel Triggers Tab Definitions](#) on [Page 96](#) for definitions of all fields and buttons on the **Personnel Triggers** tab. [Figure 26](#) on [Page 96](#) shows the **Personnel Triggers** tab.

Figure 26: Personnel Triggers Tab



Personnel Triggers Tab Definitions

The fields and buttons on the Personnel Personnel Triggers tab are shown in [Table 14](#) on [Page 97](#).

Table 14: Personnel Personnel Triggers Tab Definitions

Field/Button	Description
Add Personnel Trigger	Click this button to add a new Personnel Trigger. A Name Selection dialog box opens to allow you to choose either the Door object type (the default) or the Elevator object type and the specific Door/Elevator . You can then select a Card Admitted/Card Rejected Journal Message and the Event and Schedule for this trigger.
Remove Personnel Trigger	Select a trigger row and click this button to remove the selected row.
Door or Elevator	Displays the Door or Elevator you selected from the Name Selection dialog box..
Journal Message	Click the down-arrow to select Card Admitted or Card Rejected from the drop-down list.
Event	Click in this field to display <input type="text"/> and then click this button to select the Event to be pulsed when the Journal Message selected in the preceding field is logged to the journal for the Door or Elevator selected in the first field. You can select either a host Event or a panel Event. <ul style="list-style-type: none"> When the home panel of a panel Event is offline, pulsing the Event does nothing, but if the home panel of the Door/Elevator is offline, pulsing the Event is postponed until communication is restored.
Schedule	Click in this field to display <input type="text"/> and then click this button to select the Schedule on which the Event is pulsed when the selected Journal Message is logged for the Door/ Elevator selected in the first field..
Time Zone	Displays the Door/Elevator Time Zone (read-only). NOTE: This is the Time Zone of the iSTAR Controller for the Door or Elevator. If the Controller does not have an assigned Time Zone, the Time Zone of the Server is displayed.

Personnel Personnel Triggers Tab Tasks

You can perform the following tasks from the Personnel Triggers tab:

- [Adding a Personnel Trigger on Page 97.](#)
- [Removing a Personnel Trigger on Page 98.](#)

Adding a Personnel Trigger

You can add a Trigger to a Personnel record that pulses an Event whenever a Card Admitted/Card Rejected message is logged to the Journal for that person at a defined Door/Elevator. The Event will be pulsed based on the selected Schedule within the selected Door's/Elevator's Time Zone.

To Add a Trigger

- From the **Personnel Triggers** tab of the Personnel Editor, click **Add Personnel Trigger**. A **Name Selection** dialog box appears with **Door** entered as the default in the **Object Selection** box **Select Type** field.
- Click one of the Doors from the list below to select a Door.
- or -
Click in the **Select Type** field to open the **Select Type** dialog box to select an Elevator.

- a. Click **Elevator** in the **Class** field in the list below. The **Name Selection** dialog box reappears with **Elevator** entered in the **Object Selection** box **Select Type** field and the Elevators available in the system listed below.
 - b. Click one of the listed Elevators to select it.
3. A new row appears in the table with the Door/Elevator you selected in the **Door or Elevator** field.
 4. Click the down-arrow in the **Journal Message** field to display a drop-down list with 2 choices, Card Admitted and Card Rejected, and select one of the two. The message you chose displays in the **Journal Message** field.
 5. Click in the **Event** field to open the **Event** selection dialog box and click an Event in the list to select it. The Event you chose displays in the **Event** field.
 6. Click in the **Schedule** field to open the **Schedule** selection dialog box and click a Schedule in the list to select it. The Schedule you chose displays in the **Schedule** field.
 7. The Time Zone field behaves as follows:
 - If the iSTAR Controller for the selected Door/Elevator has an associated Time Zone, that Time Zone is displayed. (This field is read-only and is filled by the system once you select the Door or Elevator.)
 - If the iSTAR Controller for the selected Door/Elevator does **not** have an associated Time Zone, the time zone is assumed to be that of the Server, but is not displayed at all.

The Personnel Triggers tab now looks as shown in the following example:



8. To create more Triggers for this person, repeat the preceding steps.
9. To save the Personnel Triggers you configured, click **Save and Close**.

Removing a Personnel Trigger

To Remove a Personnel Trigger

1. From the **Personnel Triggers** tab of the Personnel Editor, click the row in the table that you wish to remove. To select a row, click the row selector. The row is highlighted, and the row selector changes to .
2. Click **Remove Personnel Trigger**.
3. To save the **Personnel Triggers** settings, click **Save and Close**.

Personnel Type

The C•CURE 9000 Personnel Type Editor is used to create Personnel Type objects to reflect the job titles and roles for the people who need access to your site.

In this chapter

Personnel Type Overview	100
Samples of Expiration Time Span Settings	104

Personnel Type Overview

A Personnel Type lets you categorize each Personnel record in your database based on the person's role or type. By default you can choose Employee, Contractor, Visitor, or None. However, you can also use the **Personnel Type Editor** to define additional Personnel Types to suit your site.

Example:

If you wanted to identify Personnel records as Security Personnel, Maintenance Personnel, Temporary Employees, or any other employee category, you can create these new Personnel Types and then assign the type to Personnel records in your database.

Figure 27 on Page 100 shows the Personnel Type editor.

Figure 27: Personnel Type editor

The screenshot shows a window titled "Personnel Type - Part-Time" with a "Save and Close" button. The "Name" field contains "Part-Time". The "Description" field is empty. The "Partition" is set to "Default", and the "Maintenance Mode" checkbox is unchecked. The "Enable Default Expiration Override" checkbox is checked. Below this, the "Expiration Time Span" section is expanded, showing "Default Credential Expiration Time" with radio buttons for "Years", "Days" (selected), and "Hours". A spinner box next to "Days" shows the value "24". The "From" dropdown is set to "Activation Date Time", and the "Use Current Day's Year" checkbox is unchecked. The "Time of Expiration" section shows a spinner box with "10:25 AM" selected. A text box below explains that users can specify default expiration times for new Credentials as a number of Hours, Days or Years from the Credential's creation time, and that if specified in Days or Years, the specific time of day the expiration will occur. At the bottom, the "Inactivity Period (days)" spinner box shows the value "0".

Overriding the Default Time Span of Expiration for a Personnel Type

The setting for the Personnel system variable **TimeSpan of Expiration** specifies the time period past the creation date of a credential to use for the default expiration date of a new credential. (See Personnel System Variables in the *C•CURE 9000 System Maintenance Guide* for more information).

You can change this default value for a specific Personnel Type by selecting **Enable Default Expiration Override** in the Personnel Type editor.

Example:

If the default value set by the system variable **TimeSpan of Expiration** is five years, and you want to set the default value for new credentials for Personnel assigned the Visitor Personnel Type to five days, you can change this default while editing the Visitor Personnel Type by selecting **Enable Default Expiration Override** in the Personnel Type editor and changing the setting.

The **Default Credential Expiration Time** is expressed in Years, Days, or Hours. When Years or Days is selected, you can specify the **Time of Expiration** - the time of day that Expiration occurs. When Hours is selected, the **Time of Expiration** is unavailable.

If you want to base the expiration date of Credentials for a Personnel Type on a Date field in the Personnel record, you can select a date field from the From drop-down list. You can also chose to select the current year as the starting point for the expiration period.

Example:

You want Credentials for the **Employee** Personnel Type to expire on each person's birthdate three years after activation. Your database uses the **Date1** field from the Personnel Customer tab to contain the person's birthdate.

- Select **Enable Default Expiration Override**.
- Select a **Default Credential Expiration Time** of 3 Years.
- Select **Date1** in the **From** drop-down list.
- Select **Use Current Day's Year**.

With these selections, all subsequently created Personnel of type Employee will have their Credential expire on their birthday three years after the Credential is issued.

For more examples of how to use this setting, see [Samples of Expiration Time Span Settings](#) on Page 104.

To Set the Expiration Time Span for Credentials Assigned to Personnel of a Personnel Type

1. Click the **Personnel** pane button in the Administration Station.
2. Select **Personnel Type** from the drop-down list in the Personnel pane toolbar.
3. Click  to open a Dynamic View showing all Personnel Type objects.
4. Double-click the name of the Personnel Type in the list that you want to edit.
5. Select **Enable Default Expiration Override**.
6. Set the numeric portion of the **Default Credential Expiration Time** by typing a number or clicking .
7. Choose **Years**, **Days**, or **Hours** to set the time period.
8. You can choose a Personnel Date Field to set a specific date on which you want Credentials of this Personnel Type to expire (as an alternative to the default setting - Activation Date Time).

Example:

If the Personnel field **Date 1** on the Customer tab represents the birthday of Personnel, choosing that field for the **From** date would set the Expiration Date to the Date 1 setting (their birthday) for each person.

9. If you chose **Years** or **Days** for the time period, you can select a **Time of Expiration** by selecting the check box  2:02 PM  and using  to change the hour, minutes, and AM/PM setting.

10. Click **Save and Close** to save your changes.

Setting Disabling by Inactivity Periods for Personnel

In addition, the **Personnel Type** Editor lets you determine which Personnel Credentials will be disabled when the 'Disable by Inactivity' service is configured to run daily. You use this **Personnel Type** Editor to configure the inactivity period for the different Personnel Types in your system. (The 'inactivity period' is the number of days a person's access card is permitted to go without valid card activity before that Credential is automatically disabled.) For more information, see:

- [Disabling Credentials for Inactivity Overview on Page 26](#)
- [Configuring the Disable by Inactivity Process for Personnel Credentials on Page 44](#)

Personnel Type Definitions

The following table gives definitions of the fields in the Personnel Type Editor.

Table 15: Personnel Type Editor Definitions

Field	Description
Name	Type a name for the Personnel Type you are creating.
Description	Type a description that will help you identify this Personnel Type or its intended usage.
Partition	A read-only field displaying the partition to which this Personnel Type belongs. This field is visible only if the C•CURE 9000 system is partitioned.
Can Be Visitor	If this check box is selected, Personnel assigned to this Personnel Type can be assigned as Visitors for the Visitor Management application.
Enable Default Expiration Override	Enable this option to set up a Default Credential Expiration Time for this Personnel Type that is different from the overall setting for the Personnel system variable TimeSpan of Expiration . You can use this to set up a Personnel Type that has a shorter or longer Expiration timespan than the default. This could be useful for a temporary employee type, for example.
Default Credential Expiration Time	You can set a timespan for the default period after which Credentials of a person assigned to this Personnel Type expire automatically. After you select a Number , you can set the unit of time to Years, Days, or Hours .
Number	Type or use  to set the number for the Default Credential Expiration Time. The range of numbers is determined by the Years, Days, or Hours setting. Maximum settings are: Years: 24 Days: 99 Hours: 24
Years, Days, Hours	Choose one of these time measurements by clicking the radio button.

Personnel Type Editor Definitions (continued)

Field	Description
From	<p>You can select one of the following date fields from Personnel to use as the beginning date for the Default Credential Expiration Time (instead of the Activation Date Time default).</p> <p>Available fields are:</p> <ul style="list-style-type: none"> • Activation Date Time (Credential) - This is the default choice for a Credential when created via the Personnel Credential tab or the Credential editor. If you choose another field, the Hours time measurement is not available (because the Date fields do not support Hours). • Date1 (from the Personnel Customer tab - if the field label has been changed, the new label appears in this drop-down list) • Date2 (from the Personnel Customer tab - if the field label has been changed, the new label appears in this drop-down list) • Date3 (from the Personnel Customer Extended tab - if the field label has been changed, the new label appears in this drop-down list) • Date4 (from the Personnel Customer Extended tab - if the field label has been changed, the new label appears in this drop-down list) <p>The Value of the field (for each record) is used to determine the expiration date of the related Personnel Credential. For examples of how to use this setting, see Samples of Expiration Time Span Settings on Page 104.</p>
Use Current Day's Year	<p>Check this box to use the Month and Date of the From field, along with the current year, for beginning of the period defined by the Credential Expiration Time. When this box is not checked, the entire date in the From field is used to signify the start of the Credential Expiration Time period.</p> <p>Example:</p> <p>If the date in the From field is 10/20/2014 and this check box is cleared, the Expiration Date will become 10/20/2014 plus the duration specified in Default Credential Expiration Time. If the check box is checked, the start of the Default Credential Expiration Time will be 10/20 of the current year.</p>
Time of Expiration	<p>You can set the time of day that a credential associated with this Personnel Type expires. Select the check box, then use  to change the hour, minutes, and AM/PM setting.</p> <p>this setting is only available if you chose Years or Days as a unit of measurement.</p>
Inactivity Period	<p>The number of days without valid card activities that can elapse for Personnel with this Personnel Type before an enabled/running Disable by Inactivity service disables the Credential.</p> <p>This setting is only used if the System Variable for Disable by Inactivity is enabled, and the Disable by Inactivity service is running. For more information, see the <i>C•CURE 9000 System Maintenance Guide</i> section on Personnel System Variables .</p> <p>The default value for this field is 0 (zero), which means that Personnel with this Personnel Type will never be disabled by inactivity.</p>

Using the Personnel Type Context Menu

The Personnel Type context menu in the Dynamic View of Personnel Types includes the selections common to all objects, as well as additional selections specific to Personnel Types. See [Using the Object List Context Menu](#) on [Page 23](#) for more information on the common selections.

You can select one or more Personnel Types in the Dynamic View (using **SHIFT+Left-click** and **CTRL+Left-click**) and perform functions such as Set properties (Change Description and/or Inactivity Period), Add Personnel to Groups, or Export Personnel Type, using the context menu.

Samples of Expiration Time Span Settings

You can set the Expiration Time Span for Credentials added to Personnel records in three ways:

- You can set the Expiration Time span for all new Credentials with the **TimeSpan of Expiration** System Variable.
- You can set the Expiration Time span for all new Credentials of a Personnel Type from the Personnel Type editor.
- You can set the Expiration Time span for one or more Temporary Credentials using the context menu selection **Activate Temporary**.

C•CURE 9000 can calculate the default Expiration Date for Credentials based on:

- The System generated **Activation Date/Time** (the time when the Credential was created).
- One of the four Customer/Extended tab date fields (**Date1** to **Date4**).

Following are examples of setting the Expiration Time Span using these methods.

Example: Set the TimeSpan of Expiration System Variable for all New Credentials

When you create a new Credential, the Activation Date/Time is set to the current date and time. If you use the settings shown below, the Credential will expire 3 years after the date the Credential was created.

The screenshot shows a window titled "System Variables" with a "Save and Close" button. The main area is titled "Expiration Time Span" and contains the following text: "You may specify the default expiration times for new Credentials as a number of Hours, Days or Years from specific Cardholder Date Field. Additionally, if you specify the default expiration time in Days or Years, you may also specify the specific time of day the expiration will occur. If you elect not to, the time of day when expiration occurs will be the time of day the credential was created."

Below this text is a section titled "Default Credential Expiration Time" with three radio buttons: "Years" (selected), "Days", and "Hours". A spin box next to "Years" is set to "3".

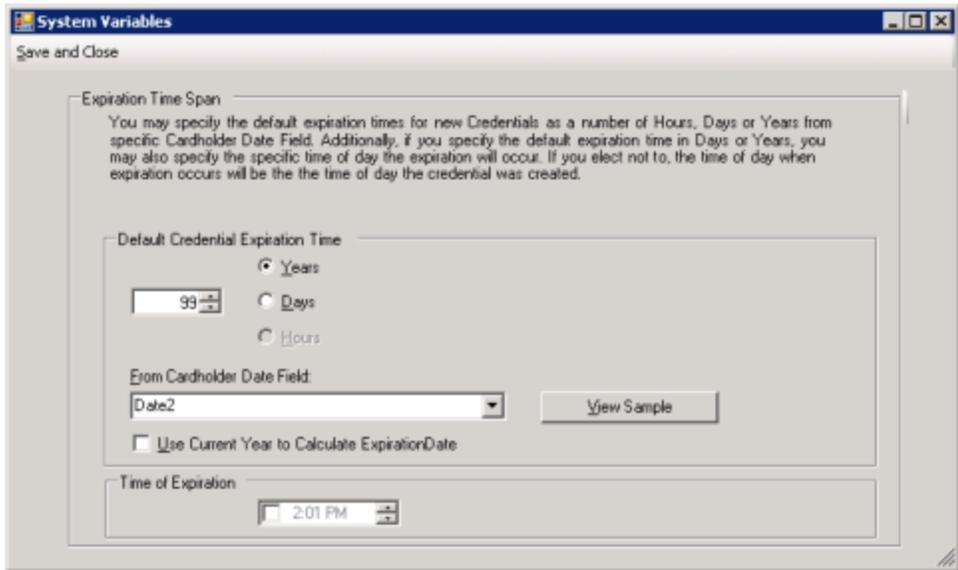
Underneath is a dropdown menu labeled "From Cardholder Date Field:" with "Activation Date/Time" selected. To its right is a "View Sample" button.

At the bottom of this section is a checkbox labeled "Use Current Year to Calculate ExpirationDate" which is unchecked.

Below this is a section titled "Time of Expiration" with a spin box set to "2:01 PM" and a checked checkbox.

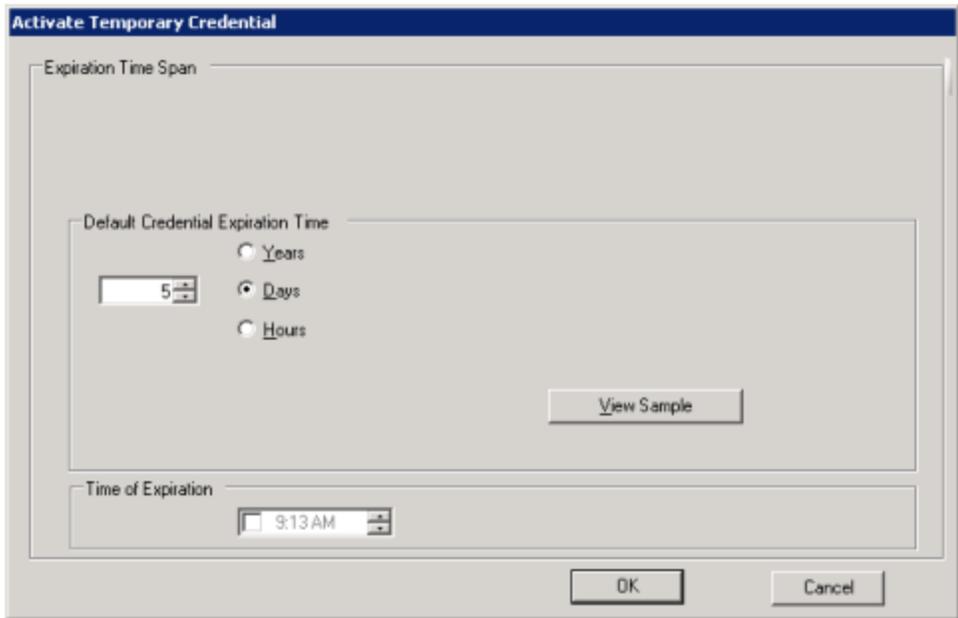
If you select a different Cardholder Date Field, the system uses the date in that field to calculate when the Credential will expire.

In this example, all New Credentials will expire 99 days after the date in the Date2 field in the cardholder's Personnel record.



Example: Set the Expiration Time Span for Temporary Credentials using Activate Temporary

When you Activate a Temporary Credential, you cannot choose a cardholder date field; the Activation Date/Time is set to the current date and time. If you use the settings shown below, the Credential will expire 5 years after the date the Credential was created.



Example: Calculate from Cardholder Activation Date/Time

When you create a new Credential, the Activation Date/Time is set to the current date and time. If you use the settings shown below, the Credential will expire 5 years after the date the Credential was created.

Example: Calculate from Cardholder Customer Date Field

If you use one of the Customer/Extended Tab Date fields for this calculation, the Credential will expire 5 years after the date in the field chosen.

Example: Calculate from Cardholder Hire Date Field

If you use one of the Customer/Extended Tab Date fields to represent the cardholder's date of hiring (such as using the Date1 field as the hire date), the Credential will expire 5 years after the cardholder's Hire date.

Example: Calculate from Cardholder BirthDate Field

If you use one of the Customer/Extended Tab Date fields to represent the cardholder's birthdate (using the Date1 field as the birth date), you can select **Use current year to calculate Expiration Date** to have Credential expire 5 years from the current year on the cardholder's birthday.

Samples of Expiration Time Span Settings

Default Credential Expiration Time

Years
 Days
 Hours

From Cardholder Date Field:

Use Current Year to Calculate ExpirationDate

Clearance

A Clearance defines the locations and times an access card is valid. In C•CURE 9000, you create Clearance objects to define the access to specific doors and elevators on specified schedules, and then assign these clearances to individual cardholders, or groups of cardholders.

In this chapter

Clearance Editor	110
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Clearance Editor

The Clearance Editor in C•CURE 9000 lets you create Clearance objects that define the security objects that a person assigned the Clearance can access.

The following sections give more information about the Clearance object and how to use it.

- [Clearance General Tab on Page 114](#)
- [Clearance Doors Tab on Page 115](#)
- [Clearance Elevators Tab on Page 116](#)
- [Clearance Groups Tab on Page 118](#)
- [Clearance Tasks on Page 110](#)

Clearance Tasks

The following tasks can be performed with the Clearances Editor.

- [Personnel Object Tasks on Page 18](#)
- [Accessing the Clearance Editor on Page 110](#)
- [Creating a Clearance on Page 111](#)
- [Configuring a Clearance on Page 111](#)
- [Adding Doors or Door Groups to a Clearance on Page 112](#)
- [Adding Elevators or Elevator Groups to a Clearance on Page 113](#)
- [Removing Doors/Door Groups and Elevators/Elevator Groups from a Clearance on Page 114](#)
- [Clearance Groups Tab on Page 118](#)
- [Adding a Clearance to a Group on Page 119](#)

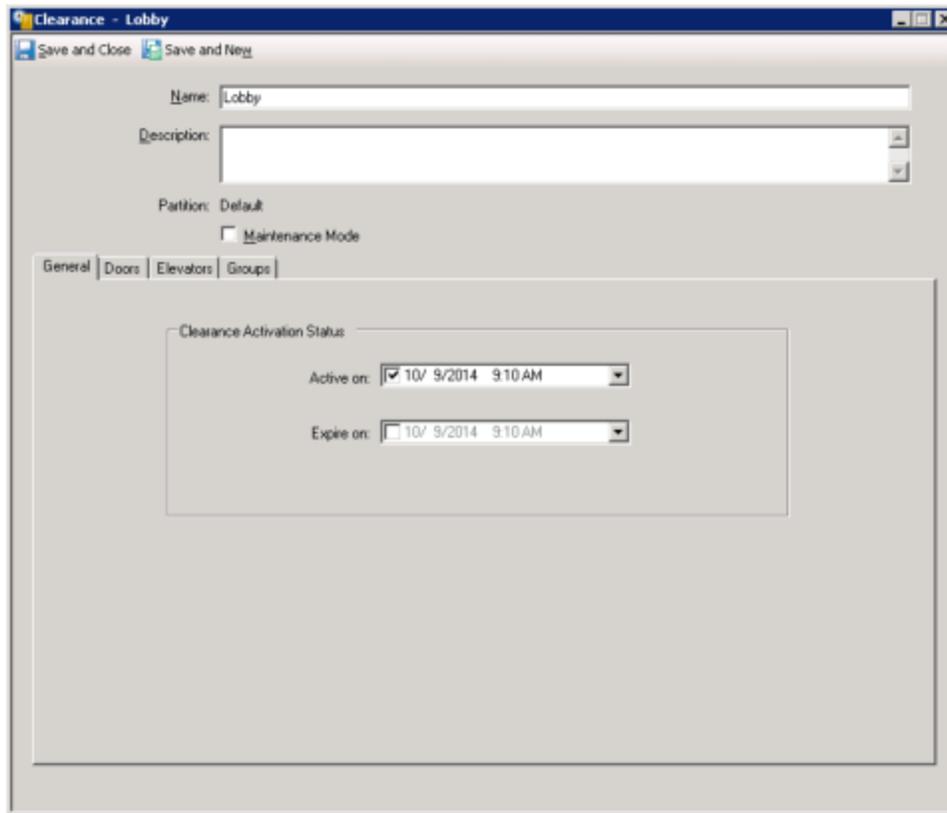
Accessing the Clearance Editor

You can access the Clearance Editor from the C•CURE 9000 Personnel pane.

To Access the Clearance Editor

1. Click the **Personnel** pane button.
2. Click the Personnel drop-down list and select **Clearance**.
3. Click  to open a Dynamic View showing all Clearance objects.
4. Double-click the Clearance in the list that you want to edit. The **Clearance Editor** opens. See [Figure 28 on Page 111](#).

Figure 28: Clearance Editor



Creating a Clearance

You can create a new Clearance to assign access privileges to a person. To create a Clearance, follow the steps in [Creating an Object](#) on [Page 18](#).

When you create a Clearance, you specify the activation and expiration dates for the Clearance, as well as the Doors, Door Groups, Elevators, and Elevator Groups that are controlled by the Clearance.

NOTE

When you assign Doors or Elevators to a Clearance, Software House recommends that you assign Doors or Elevators from the same controller type to the Clearance. For example, it is better for system operation to assign Doors from several iSTAR controllers to a Clearance, rather than some Doors from iSTAR controllers and some Doors from apC controllers.

Configuring a Clearance

You can configure a Clearance for use with personnel in C•CURE 9000.

To Configure a Clearance

1. In the **Navigation** Pane of the Administration Workstation, click **Personnel** to open the Personnel pane.
2. Select **Clearance** from the Personnel drop-down list.
3. Click **New**.

- or -

Click  to view a list of existing Clearances, right-click the Clearance you wish to configure, and choose **Edit** from the context menu.

The **Clearance** Editor opens.

4. In the **Name** field, type the name that you want to use for this Clearance.
5. In the **Description** field, enter any information that would be useful for identifying the Clearance or explaining the settings you have chosen.
6. On the **Clearance General** tab, choose activation and expiration settings for the Clearance.
7. On the **Clearance Doors** tab, select the Doors (or Door Groups) that are controlled by this Clearance. See [Adding Doors or Door Groups to a Clearance](#) on [Page 112](#).
8. On the **Clearance Elevators** tab, select the Elevators (or Elevator Groups) that are controlled by this Clearance. See [Adding Elevators or Elevator Groups to a Clearance](#) on [Page 113](#).
9. On the **Clearance Groups** tab, view the list of the Clearance Groups to which this clearance belongs. If you want to add the Clearance to a Clearance Group, see [Clearance Groups Tab](#) on [Page 118](#).
10. To save your modified Clearance, click **Save and Close** .

Adding Doors or Door Groups to a Clearance

You can add Doors or Door Groups to a Clearance by adding rows to the **Doors and Door Groups** table on the **Clearance Doors** tab (see [Figure 30](#) on [Page 116](#)).

NOTE

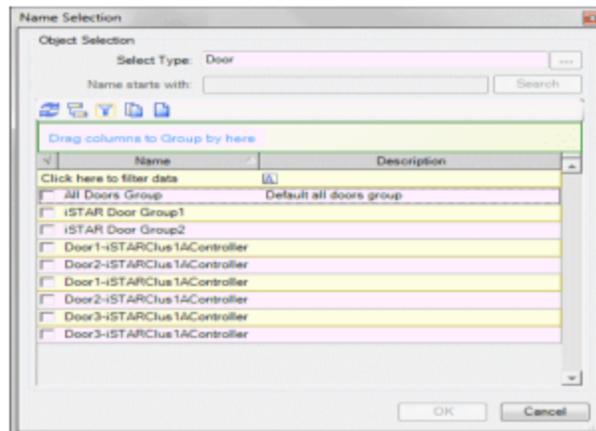
Once a Clearance has been saved, while you can add (and edit) new Doors/Door Groups as described in the following procedure, you cannot edit the existing saved items.

To make changes to existing Doors/Door Groups, you have to delete the item and then re-create it. For information, see [Removing Doors/Door Groups and Elevators/Elevator Groups from a Clearance](#) on [Page 114](#)

To Add Doors or Door Groups to a Clearance

1. From the **Clearance** Editor, click on the **Doors** tab.
2. Click **Add** and the **Name Selection** dialog box for Doors appears, with both Doors and Door Groups displayed.

Figure 29: Name Selection Dialog Box – Doors



- Click to display only Door objects or to display only Door Groups.
- Click in the check box(es) to select as many of the Doors or Door Groups as you wish and then click **OK**. (You can click **CTRL + A** and then a check box to select all the objects.)

The **Schedule** selection list dialog box appears.

- Click the Schedule you want to add to the Clearance for those Door(s)/Door Group(s).

The selection list dialog box closes and a row appears in the **Doors and Door Groups** table for each Door/Door Group you selected with the Schedule selection added to the row. (If you added a Group, the Door Group column in the table is selected)

- If you wish to change the Schedule for any Door(s)/Door Group(s), click in the **Schedule** field and then click to select a different Schedule from the **Schedule** selection list dialog box that re-opens.
- If you wish to change the selected Door/Door Group for any row, click in the **Door Name** field and then click to select the Door/Door Group from the **Door** selection list dialog box that re-opens.
- When you are done adding Doors and Schedules to the Clearance, click **Save and Close** to save the Clearance.

Adding Elevators or Elevator Groups to a Clearance

You can add Elevators or Elevator Groups to a Clearance by adding rows to the **Elevators and Elevator Groups** table on the **Clearance Elevators** tab (see [Figure 31](#) on [Page 117](#)).

NOTE

Once a Clearance has been saved, while you can add (and edit) new Elevators/Elevator Groups as described in the following procedure, you cannot edit the existing saved items.

To make changes to existing Elevators/Elevator Groups, you have to delete the item and then re-create it. For information, see [Removing Doors/Door Groups and Elevators/Elevator Groups from a Clearance](#) on [Page 114](#)

To Add Elevators or Elevator Groups to a Clearance

- From the **Clearance** Editor, click the **Elevators** tab.

2. Click **Add** and the **Name Selection** dialog box for Elevators appears, with both Elevators and Elevator Groups displayed.
3. Click  to display only Elevator objects or  to display only Elevator Groups.
4. Click in the check box(es) to select as many of the Elevators or Elevator Groups as you wish and then click **OK**. (You can click **CTRL + A** and then a check box to select all the objects.)
The **Schedule** selection list dialog box appears.
5. Click the Schedule you want to add to the Clearance for those Elevator(s)/Elevator Group(s).
The selection list dialog box closes and a row appears in the **Elevators and Elevator Groups** table for each Elevator/Elevator Group you selected with the Schedule selection added to the row. (If you added a Group, the Elevator Group column in the table is selected)
6. Click in the **Floor Name** field and then click  to select the Floor or Floor Group for the Clearance. The Floor dialog box appears.
7. Click  to display only Floor objects or  to display only Floor Groups.
8. Click the Floor or Floor Group you want to add to the Clearance. The dialog box closes and the selection is added to the row. (If you added a Group, the Floor Group column in the table is selected)
9. If you wish to change the Schedule for any Elevator(s)/Elevator Group(s), click in the **Schedule** field and then click  to select a different Schedule from the **Schedule** selection list dialog box that re-opens.
10. If you wish to change the selected Elevator/Elevator Group for any row, click in the **Elevator Name** field and then click  to select the Elevator/Elevator Group from the **Elevator** selection list dialog box that opens.
You can change the selected Floor/Floor Group for any row in the same way.
11. When you are done adding Elevators, Floors, and Schedules to the Clearance, click **Save and Close** to save the Clearance.

Removing Doors/Door Groups and Elevators/Elevator Groups from a Clearance

To Remove a Door/Door Group or Elevator/Elevator Group

1. From the **Door/Elevators** tab of the **Clearances** Editor, click the row in the table that you wish to remove. (To select a row, click on the row selector. The row is highlighted, and the row selector changes to )
2. Click **Remove**.
You can then save the Clearance as is or add or remove more Door/Door Groups and/or Elevators/Elevator Groups.

Clearance General Tab

The **Clearance General** tab (see [Figure 28](#) on [Page 111](#)) lets you create a name and description for a Clearance, and define the Activation and Expiration dates for the Clearance.

Table 16: Clearance General Tab Definitions

Field/Button	Description
Name	Type a name for the Clearance.
Description	Type a textual description of the Clearance that will give you enough information to distinguish this Clearance from other similar Clearances.
Partition	A read-only field displaying the partition to which this Clearance belongs. This field is visible only if the C•CURE 9000 system is partitioned.
Clearance Activation Status	This set of field shows the dates on which the Clearance is activated and the date it expires.
Active on	Set a Clearance to become active on a future date if you want to create and assign the Clearance in advance. The Clearance does not allow access before the date you set. Select the check box and click the down-arrow to set a date using the calendar control. If the check box is not selected, the date is ignored.
Expires on	Set a Clearance to become inactive on a future date if you want to create and assign a Clearance that is temporary. The Clearance does not allow access after the date you set. Select the check box and click the down arrow to set a date using the calendar control. If the check box is not selected, the date is ignored.
Save and Close	Click Save and Close when you have completed any changes to a Clearance and wish to save those changes.
Save and New	Click Save and New when you have completed any changes to the Clearance and wish to save those changes, and you also want to create a new Clearance. The Clearance you were editing is saved, and a new Clearance opens.
	Click Close when you want to close the Clearance Editor without saving your changes. A prompt appears so that you can choose to continue editing or close the editor. Click OK to close the editor without saving changes, or click Cancel to continue editing the Clearance.

Clearance Doors Tab

The **Clearance Doors** tab (see [Figure 30](#) on [Page 116](#)) lets you specify the Doors and Door Groups that are accessible from a Clearance. When the Clearance is assigned to a person, that person can access the Doors in the list at the times specified by the Schedule associated with that Door or Door Group.

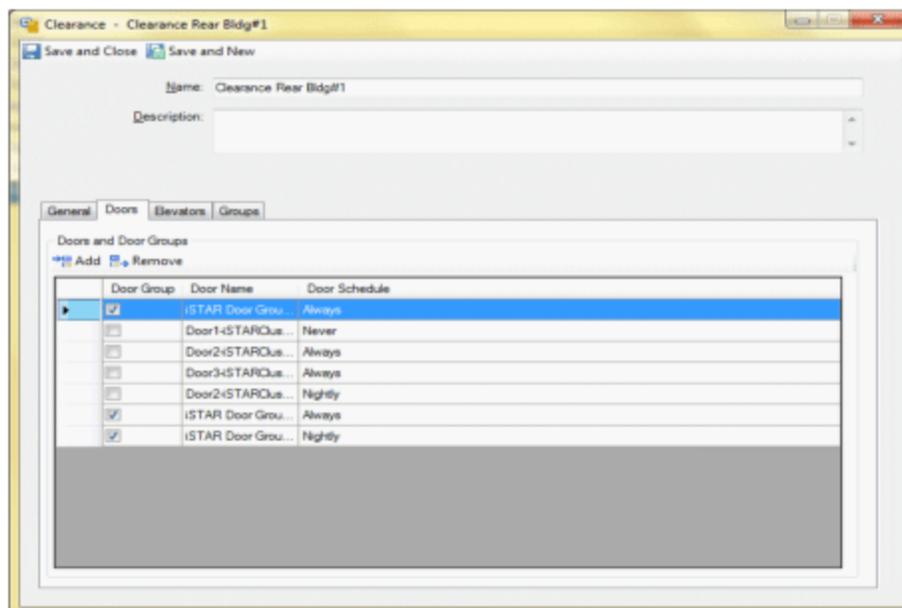
Table 17: Clearance Doors Tab Definitions

Field/Button	Description
Doors and Door Groups	This table is used to build a list of the Doors/ Door Groups that are included in this Clearance. The Doors/ Door Groups each have a Schedule object associated with them to specify when a person with this Clearance can access the Doors.
Door Group	This check box is selected if you chose a Door Group.

Clearance Doors Tab Definitions (continued)

Field/Button	Description
Door Name	Once you have selected one or more Doors/Door Groups and an associated Schedule, a row is added to the table for each Door object added to the Clearance with its name in this field. NOTE: Before the Clearance is saved , you can change the selected Door/Door Group for a row by clicking in this field and then clicking <input type="button" value="..."/> . Select a new Door/Door Group from the Door dialog box that opens to add it to the Clearance.
Door Schedule	Once you have selected one or more Doors/Door Groups and an associated Schedule, the Schedule for each selected Door object is added to the Clearance and displays in this field. NOTE: Before the Clearance is saved , you can change the selected Schedule by clicking in this field and then clicking <input type="button" value="..."/> . Select a new Schedule from the Schedule dialog box that opens to add it to the Clearance.
Add	Click this button to open a Name Selection dialog box for Doors/Door Groups. Once you have selected one or more Doors/Door Groups and clicked OK , a Schedule dialog box opens for you to select a Schedule for the chosen Door objects. A new row is added to the table for each Door/Door Group selected with its associated Schedule.
Remove	Click this button to remove the selected row from the table.

Figure 30: Clearance Doors Tab



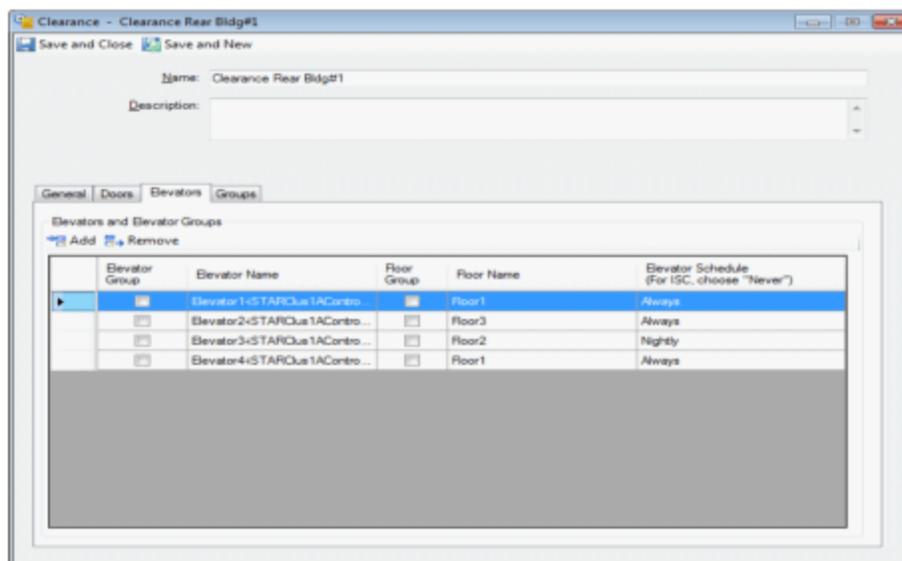
Clearance Elevators Tab

The **Clearance Elevators** tab (see [Figure 31](#) on [Page 117](#)) lets you specify the Elevators and Elevator Groups that are accessible from a Clearance. When the Clearance is assigned to a person, that person can access the Elevators in the list at the times specified by the Schedule associated with that Elevator or Elevator Group.

Table 18: Clearance Elevators Tab Definitions

Field/Button	Description
Elevators and Elevator Groups	This table is used to build a list of the Elevators/ Elevator Groups that are included in this Clearance. The Elevators/ Elevator Groups each have a Schedule object associated with them to specify when a person with this Clearance can access the Elevators.
Elevator Group	This check box is selected if you chose an Elevator Group.
Elevator Name	Once you have selected one or more Elevators/ Elevator Groups and an associated Schedule, a row is added to the table for each Elevator object added to the Clearance with its name in this field. NOTE: Before the Clearance is saved , you can change the selected Elevator/Elevator Group for a row by clicking in this field and then clicking <input type="button" value="..."/> . Select a new Elevator/Elevator Group from the Elevator dialog box that opens to add it to the Clearance.
Floor Group	This check box is selected if you chose a Floor Group rather than a single Floor
Floor Name	Click in this field, and then click <input type="button" value="..."/> to open a selection dialog box listing the available Floors/Floor Groups. Select a Floor/Floor Group to add it to the Clearance.
Elevator Schedule	Once you have selected one or more Elevators/ Elevator Groups and an associated Schedule, the Schedule for each selected Elevator object is added to the Clearance and displays in this field. NOTE: Before the Clearance is saved , you can change the selected Schedule by clicking in this field and then clicking <input type="button" value="..."/> . Select a new Schedule from the Schedule dialog box that opens to add it to the Clearance.
Add	Click this button to open a Name Selection dialog box for Elevators/ Elevator Groups. Once you have selected one or more Elevators/ Elevator Groups and clicked OK , a Schedule dialog box opens for you to select a Schedule for the chosen Elevator objects. A new row is added to the table for each Elevator/ Elevator Group selected with its associated Schedule. NOTE: You have to select and add a Floor/Floor Group manually for each Elevator/Schedule row .
Remove	Click this button to remove the selected row(s) from the table.

Figure 31: Clearance Elevators Tab

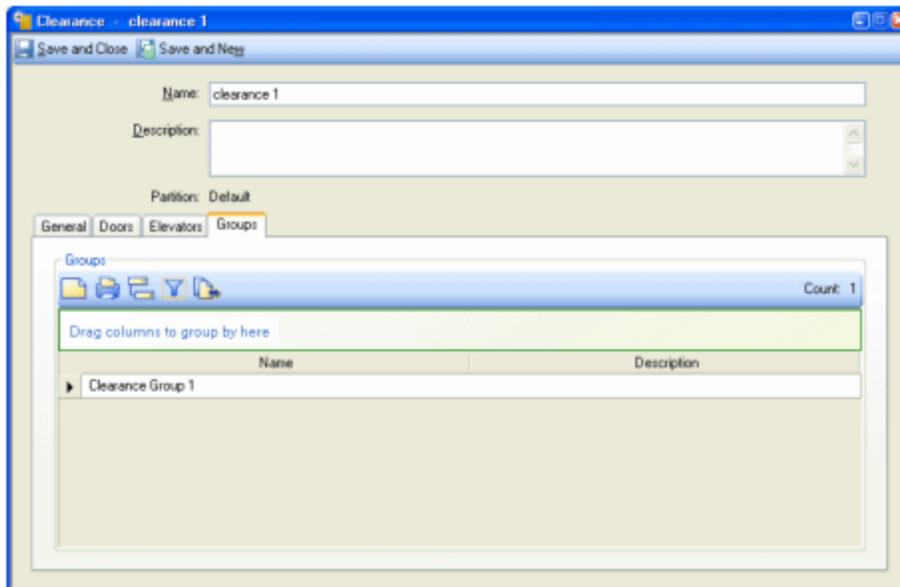


Clearance Groups Tab

Groups are used for organizing C•CURE 9000 objects and are created from the Configuration Pane. You can configure groups of controllers, inputs, outputs, readers, clearances, and other security objects.

The Clearance Groups tab (see [Figure 32](#) on [Page 118](#)) lists the Clearance Groups to which the Clearance you are editing belongs. You can double-click a Clearance Group in the list to edit the Clearance, view the Clearances that are members of the Group, and add Clearances to the Group.

Figure 32: Clearance Groups Tab



Refer to the Dynamic Views chapter in the *C•CURE 9000 Data Views User Guide* for more information about the use of the buttons found in the Groups tab.

Adding Clearances to a Group from the Clearance Groups Tab

You can add a Clearance to a Group by editing a Clearance Group listed on the Clearance Groups tab.

To Add a Clearance to a Clearance Group from the Groups Tab

1. When you double-click a Clearance Group row on the Clearances Group tab, the Group Editor General tab appears so that you can edit the Group.
2. Click **Add** on the **Group General** tab to add an object to the Clearance Group.
3. The **Clearance** dialog box opens to display a list of existing Clearances that can be added to the Clearance Group.
4. Click one or more Clearances in the list (using Windows multiple selection methods such as **CTRL+click**), and then click **OK**.
5. The Clearance(s) that you selected are added to the Group.

Adding a Clearance to a Group

If the Clearance you are editing is not a member of a Group, you can add it to a Group by right-clicking on the Clearance in a Clearances Dynamic View.

To Add a Clearance To a Group

1. In the **Navigation** Pane of the Administration Workstation, click **Personnel** to open the Personnel pane.
2. Select **Clearances** from the Personnel pane drop-down list.
3. Click  to open a Dynamic View showing all Clearance objects.
4. Right-click the Clearance in the list that you want to add to a group and select **Add To Group** from the context menu.
5. In the dialog box that appears, click the Group to which you want to add the Clearance.
6. Click **OK** in the confirmation dialog box that appears.

Credential

A Credential is an access card or PIN defined in the C•CURE 9000 Personnel editor or the Credential editor. The Credential Dynamic View allows you to view a list of all Credentials in the system, and sort, filter and group the list. You can then open the Credential Editor to edit the Credential.

In this chapter

- Credential Overview122
- Credential Dynamic View124
- Searching for Credentials128
- Credential Editor132
- Accessing The Credential Editor133
- Credential General Tab134
- Credential User-defined Fields Tab138
- Credential Badging Tab139
- Temporary Credential Tasks140
- System Variables for Credentials148
- Credentials Event Actions149

Credential Overview

Credentials in C•CURE 9000 are the database objects that represent access cards issued to Personnel. There are two types of Credential:

Personnel Credentials	Represent access cards and PINs that are permanently assigned to Personnel in the C•CURE 9000 database.
Temporary Credentials	<p>Represent access cards that are used primarily for short term access, such as temporary replacement access cards for employees whose permanent Credentials have been lost, stolen, or disabled.</p> <p>Temporary Credentials can be associated with a Personnel record, but can also exist independently in an Unassigned state.</p> <p>Temporary Credentials can also be used with the Visitor Management option to provide credentials for visiting personnel, who only require access cards for the duration of their visit. (See the <i>C•CURE 9000 Visitor Management Guide</i> for more information).</p>

You can view the Credentials in C•CURE 9000 via the Credential Dynamic View (see [Credential Dynamic View](#) on [Page 124](#)).

TIP

To quickly determine which Person record owns an Assigned or Activated Temporary Credential, right-click on the Credential in the Credential Dynamic View and choose **Edit Person**. The owner's Personnel record opens in the Personnel editor so you can review the person and their credentials.

You can create/edit Temporary Credentials and edit Personnel Credentials using the Credential editor (see [Credential Editor](#) on [Page 132](#)).

You can create Personnel Credentials from the Personnel Credential tab (see [Personnel Credentials Tab](#) on [Page 54](#)).

The following topics provide more information about using Credentials:

- [Managing Temporary Credentials](#) on [Page 140](#) discusses how to manage Temporary Credentials, including a workflow example for creating, allocating, tracking, and re-using your Temporary Credentials.
- [Credentials Event Actions](#) on [Page 149](#) explains the new Event actions that can be used to automate some of the management of Temporary Credentials.
- [System Variables for Credentials](#) on [Page 148](#) details the System Variables that are used to manage the activation and expiration of Temporary Credentials.
- [Using the Credential View Context Menu](#) on [Page 125](#) explains the menu selections that are available on the context menu of the Credential Dynamic View.

Disable by Inactivity

Credential Inactivity features (such as Disable by Inactivity) do not apply to Temporary Credentials.

Enterprise Support for Temporary Credentials

Temporary Credentials can be created in any Partition. A Temporary Credential can be assigned to a Personnel record in a different Partition, or on a different Application Server. A local Personnel record can be assigned a Global Temporary Credential, and a Global Personnel record can be assigned a local Temporary Credential.

As a result, there may be instances where a Personnel record on a SAS cannot display some of the Temporary Credentials that are assigned to a person on a remote system. In such a case, a warning message box is displayed

when viewing the Personnel Credential tab that explains that "additional card(s) are assigned to this person" that are not visible from this SAS.

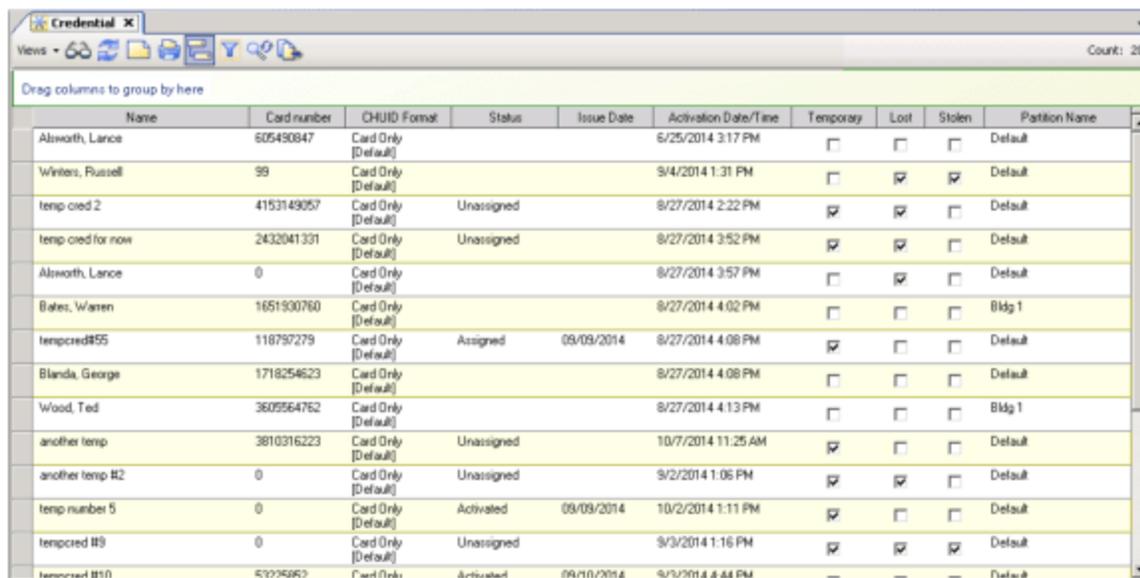
Credential Dynamic View

The Credential Dynamic View displays a list of all Credentials (both permanent and temporary).

To Open the Credential Dynamic View

1. Follow the steps in [Viewing a List of an Object Type](#) on [Page 20](#), choosing **Credential** from the Personnel pane drop-down list.
2. Click  to open the Credential Dynamic View.

Figure 33: Credential Dynamic View



Name	Card number	CHUID Format	Status	Issue Date	Activation Date/Time	Temporary	Lost	Stolen	Partition Name
Absworth, Lance	605450847	Card Only [Default]			6/25/2014 3:17 PM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Default
Winters, Russell	99	Card Only [Default]			9/4/2014 1:31 PM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Default
temp cred 2	4153149057	Card Only [Default]	Unassigned		8/27/2014 2:22 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default
temp cred for now	2432041331	Card Only [Default]	Unassigned		8/27/2014 3:52 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default
Absworth, Lance	0	Card Only [Default]			8/27/2014 3:57 PM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default
Bates, Warren	1651900760	Card Only [Default]			8/27/2014 4:02 PM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bldg 1
tempcred#55	118797279	Card Only [Default]	Assigned	09/09/2014	8/27/2014 4:08 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Default
Blanda, George	1718254623	Card Only [Default]			8/27/2014 4:08 PM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Default
Wood, Ted	3605564762	Card Only [Default]			8/27/2014 4:13 PM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bldg 1
another temp	3810316223	Card Only [Default]	Unassigned		10/7/2014 11:25 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Default
another temp #2	0	Card Only [Default]	Unassigned		9/2/2014 1:06 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default
temp number 5	0	Card Only [Default]	Activated	09/09/2014	10/2/2014 1:11 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Default
tempcred #9	0	Card Only [Default]	Unassigned		9/3/2014 1:16 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Default
tempcred #10	53232852	Card Only [Default]	Activated	09/10/2014	9/3/2014 4:44 PM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Default

NOTE

You can right-click on any column in the view to add or remove columns from the view. In particular, you can add a helpful column called **Assigned To Personnel Name** so that you can see the name of the Personnel record to whom a Temporary Credential is assigned. this field is blank if the card is not temporary, or if it is unassigned.

You can use the Dynamic View controls to refresh, filter, print, etc. the contents of the Dynamic View, as explained in [Viewing a List of an Object Type](#) on [Page 20](#).

Table 19: Credential View Definitions

Field/Button	Definition
Name	The name of the Credential, or the Person name associated with the Credential.
Card Number	The Card Number for the Credential.
CHUID Format	The CHUID format for the Credential.

Table 19: Credential View Definitions (continued)

Field/Button	Definition
Status	Whether the Credential is Assigned , Activated , or Unassigned . Valid only for Temporary Credentials; for personnel Credentials, this field is blank. Unassigned - A Temporary Credential that is not assigned to a Personnel record. Assigned - A Temporary Credential that is assigned to a Personnel record, but is expired or not yet activated. Activated - A Temporary Credential that is assigned to a Personnel record and is activated.
Issue Date	The Date the Credential was last issued (each time a Temporary Credential is activated, the Issue Date is set to the current date). Valid only for Temporary Credentials; for personnel Credentials, this field is blank.
Activation Date/Time	The date and Time that the Credential was Activated.
Temporary	Is this a Temporary Credential?
Lost	Is the Credential marked Lost?
Stolen	Is the Credential marked Stolen?
Partition Name	The Partition in which the Credential resides.

Using the Credential View Context Menu

The Credential View context menu (see [Figure 34](#) on [Page 126](#)) opens when you right-click on one or more Credentials in the Dynamic View of Credentials.

You can select one or more Credentials in the Dynamic View (using multiple selection combinations such as **SHIFT+Left-click** and **CTRL+Left-click**) and perform functions such as **Set Property**, **Export Selection**, and **Batch Print Badges** using the context menu. [Using the Object List Context Menu](#) on [Page 23](#) for information about using the context menu. See [Table 20](#) on [Page 126](#) for definitions of the Credential View-specific context menu selections.

Figure 34: Credential View Context Menu

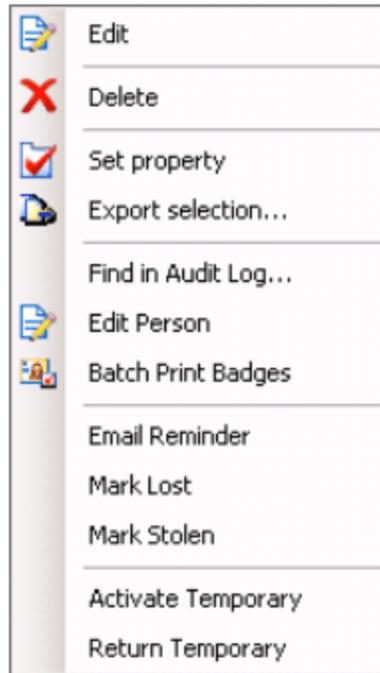


Table 20: Credential View Context Menu

Selection	Description
Edit Person	Select to open the Personnel Editor for the person assigned to the Credential. Not available for Unassigned Credentials. NOTE: This selection provides the quickest way to determine which person is assigned to a Temporary Credential.
Batch Print Badges	Select one or more badges in the Credential Dynamic View and click this menu selection to batch print the selected badge(s). Depending on your Badge Setup Printer Settings, the badges either print automatically or are added to the Batch Print Queue. If the badges are queued, the C•CURE ID Batch Print Manager dialog box opens to allow you to manage the print queue. From this dialog you can choose to print these badges and any other badges currently in the queue.
Email Reminder	Available only for Temporary Credentials that are Activated or Assigned to Personnel records that have an Email address on the Personnel General tab. Select this to send an Email Reminder to the person(s) assigned to the Temporary Credential(s). The reminder states: "You were provided a temporary card on <issue date>. Please return the card at your earliest convenience." The <issue date> field is filled in with the appropriate value, and the email is sent to the email address for the current owner as shown on their Personnel screen. If the email cannot be sent, an appropriate error is displayed in the Sending Email Reminders dialog box. This selection can be used with multiple selections, and a failure of one or more selections does not stop the attempt for other selections.
Mark Lost	Select to mark the Credential(s) as Lost. A dialog box appears to confirm the setting, and the Credential(s) are marked as Lost.
Mark Stolen	Select to mark the Credential(s) as Stolen. A dialog box appears to confirm the setting, and the Credential(s) are marked as Stolen.

Credential View Context Menu (continued)

Selection	Description
<p>Activate Temporary</p>	<p>Select to change the status of Temporary Credential(s) to Activated. A dialog box appears that allows you to set the duration of the Activation.</p> <p>You can enter a number and select whether the number represents Years, Days, or Hours.</p> <p>You can also set the time of day when the Credential(s) will expire.</p> <p>This selection appears only for Temporary Credentials.</p>
<p>Return Temporary</p>	<p>Select to change the status of Temporary Credentials to Unassigned (returning the credential to the pool of Temporary Credentials available to be assigned).</p> <p>NOTE: If the Temporary Credential has an identical name as the Personnel, returning the credential changes its status to Assigned (from Activated). Naming the card identically is assumed to mean that the card should stay with the same-named personnel.</p> <p>This selection appears only for Temporary Credentials.</p>

Searching for Credentials

You can search for Credentials using the Search functions on the Personnel pane. You can perform a Quick Search using the Credential fields on the pane, or you can perform an Advanced search by defining a Query using the Query Editor. Searches are activated by clicking the Search button (🔍).

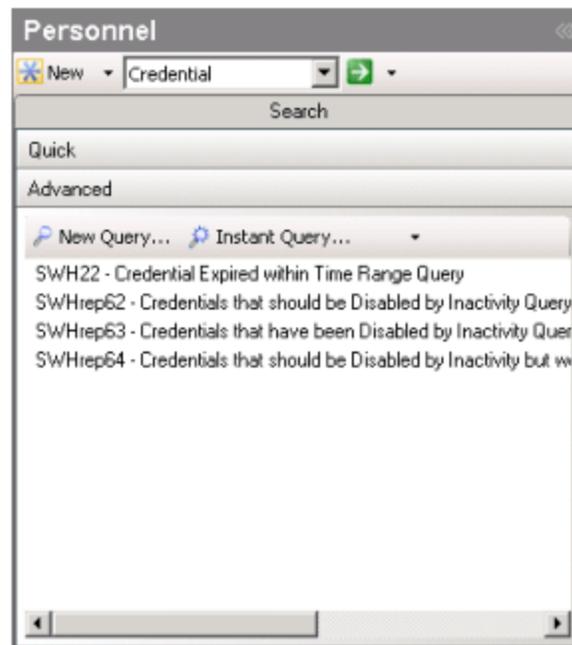
- To show a list of all Credentials, click 🔍 without entering any data in the Quick or Advanced Search panes.
- To Quick Search for Credentials, type your search information in the Quick Search pane and click 🔍. See [Performing a Credential Quick Search](#) on [Page 129](#) for more information.
- To perform an Instant Query, click **Advanced** to show the Advanced pane, then click **Instant Query**. See [Running an Instant Query](#) on [Page 31](#) for more information (the topic shows a Personnel Instant Query, but the principles are the same for Credentials).
- To perform an Advanced search, click **Advanced** to show the Advanced pane, then select a Credential Query from the list and click 🔍, as shown in [Figure 35](#) on [Page 128](#).

See [Defining a Personnel Advanced Search \(Query\)](#) on [Page 33](#) for more information (the topic shows a Personnel Advanced Query, but the principles are the same for Credentials).

NOTE

The list includes the pre-defined Queries related to Credentials that come with the system. (See Appendix A in the *C•CURE 9000 Data Views Guide* for more information.) The list also includes any Queries already defined by an Operator.

Figure 35: Credential Advanced Search Pane



- To search for Credentials for Personnel based on certain conditions, see [Searching for Credentials for Personnel](#) on [Page 36](#).
- If you have defined a default Dynamic View for Credentials that includes a Query, click 🔍 to display that view, showing Personnel that meet the criteria in the Query. See the Chapter on Dynamic Views in the *C•CURE 9000 Data Views Guide* for more information about default views.

Performing a Credential Quick Search

To Perform a Credential Quick Search

1. Click the **Personnel** pane button. The Personnel pane opens with Quick Search visible.
2. Click the drop-down list in the Personnel pane toolbar and select **Credential**.

3. Enter the Credential information you wish to search for in the Quick Search fields (**Personnel Type, Name, Card Number, Status**). You can type a full name or a partial name (search for a name that “starts with” the letters you type).

Example:

If you type “Smi” in **Name** you would find “Smith”.

The **Name** field can be used to find combinations of last, first, and middle names.

4. You can select **Cards Issued On or Before** to search for Temporary Credentials issued on that date or before that date.
5. You can select **Is Temporary Credential** to search for Temporary Credentials.
6. You can select **Lost** or **Stolen** to search for Credentials marked Lost or Stolen.
7. You can select **Template** to search for Credentials that are Templates.

NOTE

The check mark fields have three states (which cycle each time you click in the check mark):

- **Blank** means "search for records where this criteria is NOT True.
- **Checked** means "search for records where this criteria IS True".
- **Dimmed** means "do not use this criteria in the search".

Example:

If you click so that the **Template** check box is dimmed ()⁽¹⁾, the search results will show both Template and Non-Template Credentials.

8. Click  to open a Dynamic View showing the Credential objects that match the information you entered.

Quick Search Examples for Temporary Credentials

The following are examples of ways to use Quick Search with Temporary Credentials.

To Find Out How many Temporary Credentials Exist

1. Follow the steps for [Performing a Credential Quick Search](#).
2. Select **Is Temporary Credential** and click .
3. The result will be a Dynamic View listing all Temporary Credentials.

To Find Out How Many Temporary Credentials are Assigned to a Personnel Type

1. Follow the steps for [Performing a Credential Quick Search](#).
2. Use the Personnel Type drop-down list to pick a Personnel Type.

Example:

Select **Employee**.

3. Select **Is Temporary Credential** and click .
4. The result will be a Dynamic View listing all Temporary Credentials that are assigned to Employees.

To Find Out How Many Temporary Credentials Have Been Lost or Stolen.

1. Follow the steps for [Performing a Credential Quick Search](#).
2. Select **Lost** to search for Lost credentials, or **Stolen** to search for Stolen credentials.
3. Select **Is Temporary Credential** and click .
4. The result will be a Dynamic View listing all Temporary Credentials that are marked Lost or Stolen.

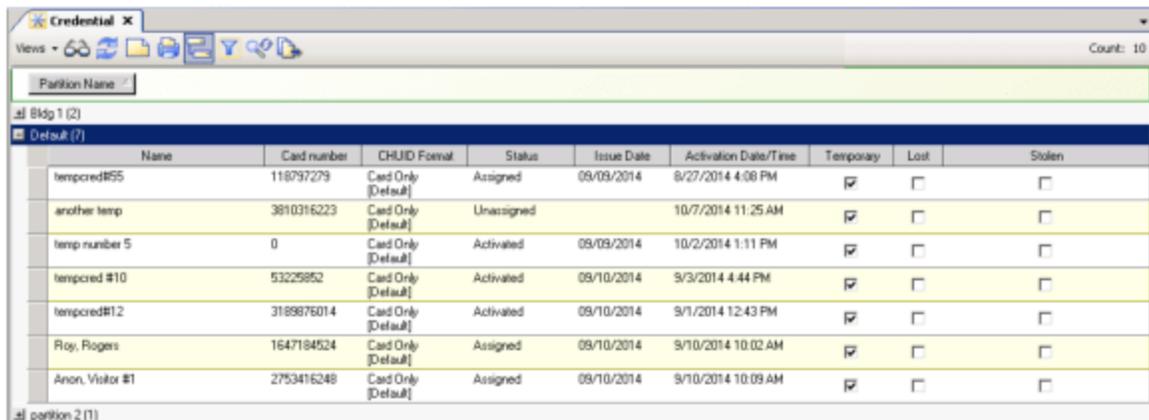
To Find Out How Many Temporary Credentials Have not Been Returned After "N" Days

1. Follow the steps for [Performing a Credential Quick Search](#).
2. Select **Cards Issued On or Before** and click the drop-down arrow to select a date that is "N" days prior to the current date.
3. Select **Activated** from the **Status** drop-down list.
4. Select **Is Temporary Credential** and click .
5. The result will be a Dynamic View listing all Temporary Credentials that are still activated after "N" days.

To Find Out How Many Temporary Credentials are Unassigned and Available to be Assigned

1. Follow the steps for [Performing a Credential Quick Search](#).
2. Select **Unassigned** from the **Status** drop-down list.
3. Select **Is Temporary Credential** and click .
4. The result will be a Dynamic View listing all Temporary Credentials that are Unassigned.

To find out how many Temporary Credentials are available for each Partition, you can click on the Partition Name column of the Dynamic View and drag it to the **Drag Columns to group by here** area to sort the Dynamic View results by Partition.



Name	Card number	CHUID Format	Status	Issue Date	Activation Date/Time	Temporary	Lost	Stolen
tempcred#55	116797279	Card Only [Default]	Assigned	09/09/2014	8/27/2014 4:08 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
another temp	3810316223	Card Only [Default]	Unassigned		10/7/2014 11:25 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
temp number 5	0	Card Only [Default]	Activated	09/09/2014	10/2/2014 1:11 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
tempcred #10	53225852	Card Only [Default]	Activated	09/10/2014	9/3/2014 4:44 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
tempcred#12	3189876014	Card Only [Default]	Activated	09/10/2014	9/1/2014 12:43 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roy, Rogers	1647184524	Card Only [Default]	Assigned	09/10/2014	9/10/2014 10:02 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Anon, Visitor #1	2753416248	Card Only [Default]	Assigned	09/10/2014	9/10/2014 10:09 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Credential Editor

The Credential editor can be opened from the Personnel pane to let you edit a regular Credential or a Temporary Credential.

Regular Credentials are access cards and PINs associated with Personnel records in the system.

Temporary Credentials are access cards or PINs that are assigned to Personnel on a Temporary basis. These Credentials can be **Assigned** to Personnel, **Activated** for Personnel, or **Unassigned** (waiting to be assigned).

Regular Credentials can ONLY be created from the Personnel editor Credential tab (see [Personnel Credentials Tab](#) on [Page 54](#)).

Temporary Credentials can be created from the Credential editor (see [Credential General Tab](#) on [Page 134](#)) or using the Personnel editor Credentials tab.

See [Managing Temporary Credentials](#) on [Page 140](#) for more information about Temporary Credentials.

The following sections provide more information about using the Credential Editor.

- [Credential Editor Tabs](#) on [Page 132](#)
- [Credential Tasks](#) on [Page 132](#)

Credential Editor Tabs

The Credential Editor stores access card information on several tabbed views. The following sections give more information about each Credential editor tab and how to use it.

- [Credential General Tab](#) on [Page 134](#)
- [Credential User-defined Fields Tab](#) on [Page 138](#)
- [Credential Badging Tab](#) on [Page 139](#)

Credential Tasks

You can perform the following tasks related to one or more Credentials.

- [Accessing The Credential Editor](#) on [Page 133](#)
- [Creating a Temporary Credential](#) on [Page 141](#)
- [Searching for Credentials](#) on [Page 128](#)
- [Using the Credential View Context Menu](#) on [Page 125](#)
- [Personnel Object Tasks](#) on [Page 18](#)
- [Temporary Credential Tasks](#) on [Page 140](#)

Accessing The Credential Editor

You can access the Credential Editor from the C•CURE 9000 Personnel pane.

To Access the Credential Editor

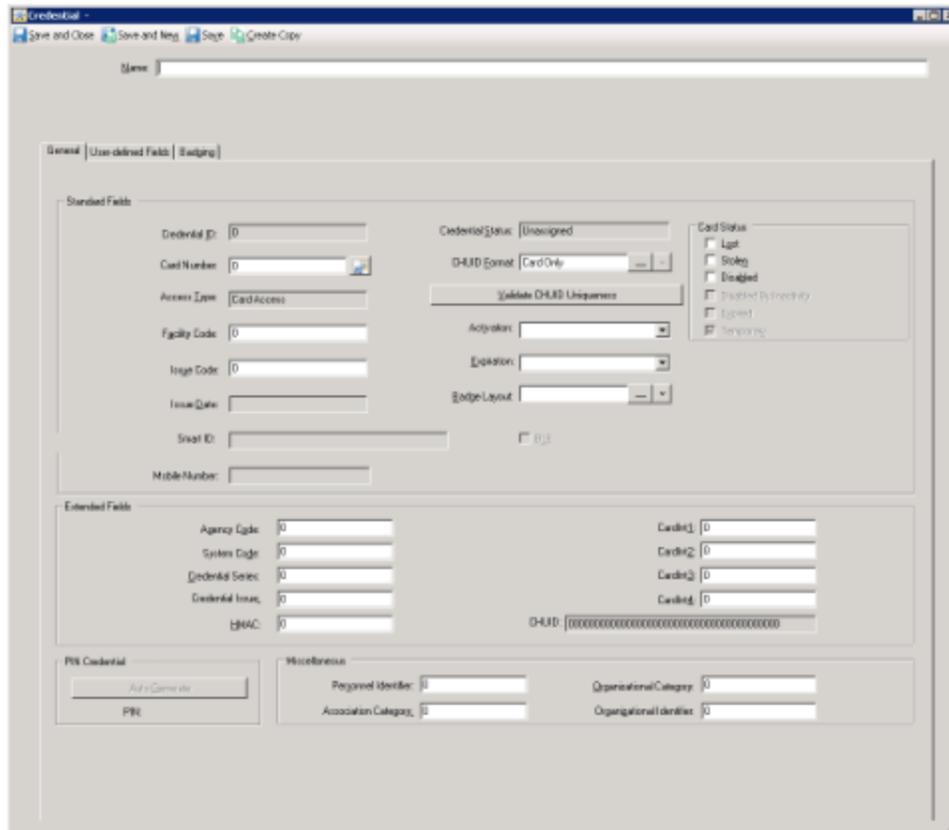
1. Click the **Personnel** pane button in the Administration Station.
2. Select **Credential** from the drop-down list in the Personnel pane toolbar.
3. Click  to open a Dynamic View showing all Credential objects.
4. Double-click the name of the Credential in the list that you want to edit (or right-click to display the context menu, then click **Edit**), and the Credential Editor opens.

Credential General Tab

The Credential General tab allows you to create/edit Temporary Credentials or edit regular Credentials.

The General tab includes the fields that are on the Personnel Credential tab, with the exception of the Credential table that can show multiple Credentials. The Credential editor shows only one Credential at a time.

Figure 36: Credential General Tab



Credential General Tab Definitions

The fields and buttons on the Credentials General tab are shown in [Table 21](#) on [Page 134](#).

Table 21: Credential General Tab Definitions

Field/Button	Description
Standard Fields	
Name	The Name associated with the Credential: either the name of a Temporary Credential or the name of a Personnel record with which a regular Credential is associated.
Partition	The Partition in which the Credential resides.
Credential ID	The sequence number for each Credential is incremented for each Credential for a given person. This value is unique and thus useful for importing Personnel and their credentials. This value is auto-generated and cannot be changed.

Credential General Tab Definitions (continued)

Field/Button	Description
Card Number	<p>Card Number is a value up to 20 digits in length (with a maximum value of 18446744073709551615).</p> <p>The card number is manually typed in and need not be unique as long as the CHUID of which it is a part of is unique. The card number length may be limited to less than 20 digits by the CHUID format you are using.</p> <p>Example:</p> <p>A card number of 333 with a facility code of 2 would not conflict with a card number of 333 with a facility code of 3, if the facility code was part of the CHUID.)</p> <p>Three fields are filled in when you type a card number in this field:</p> <ul style="list-style-type: none"> • The Card Number field in the Credentials data grid. • The read only Card Number field. • The read only CHUID Format field. <p>For a PIN-Only credential, the label PIN is displayed in the CardNumber field. The PIN itself is never displayed in this table.</p>
Access Type	The Access Type for each Credential. The value is set to CardAccess if you click Add Card Access or PIN-Only if you click Add Pin Only Access .
Facility Code	The Facility Code for the credential, entered manually, which can be up to 9223372036854775807, unless limited by the CHUID Format.
Issue Code	The Issue Code , usually used to indicate the number of times the credential has been issued. The value can be up to 2147483647, as limited by CHUID Format.
Issue Date	The date a Temporary Credential was Issued to a Person.
SMART ID	<p>Visible only if a Smart ID CHUID format has been enabled. Represents a 128-bit field used for Smart Card credentials.</p> <p>This field is read-only unless you select a CHUID format created from the Smart ID CHUID Template (see CHUID Format Overview on Page 168).</p> <p>If you select a Smart ID CHUID format, the values you enter into the Smart ID field are used to populate the CardInt2, CardInt3, and CardInt4 fields, and to generate the read-only CHUID field.</p>
Mobile Number	<p>Visible only if the Smart ID Personnel System Variable is enabled, and you add the field to a Personnel View (Personnel Views Editor on Page 182). See the System Variables chapter in the <i>C•CURE 9000 System Maintenance Guide</i> for information about System Variables.</p> <p>The Mobile Number field is read only. Its value is assigned via an external enrollment application.</p>
Credential Status	<p>Blank for a regular Credential.</p> <p>Unassigned, Assigned, or Activated for a Temporary Credential.</p>
CHUID Format	This field shows the CHUID format chosen for each credential. Click the field and then click <input type="button" value="..."/> to choose a CHUID format. A Selection dialog box opens, listing the applicable enabled CHUID formats. For a PIN-Only credential, the PIN-Only CHUID format is automatically chosen and cannot be changed.
Activation	The Activation Date for the credential. The time defaults to the time the credential was created
Expiration	<p>Defines the Date and Time when this Card is considered expired. For new regular credentials, this is defaulted to the number of years specified in the System Options to be added to the Activation Date Time.</p> <p>Temporary Credentials expire based on the Temporary Credential Activation Default system variable.</p>
Badge Layout	Select the Badge Layout to be used for this credential from the list of badge layouts in this selection list.

Credential General Tab Definitions (continued)

Field/Button	Description
BLE	<p>Visible only if the Smart ID Personnel System Variable is enabled, and you add the field to a Personnel View (Personnel Views Editor on Page 182). See the System Variables chapter in the <i>C•CURE 9000 System Maintenance Guide</i> for information about System Variables.</p> <p>This check box indicates that this credential can be assigned to a mobile device and read by a Bluetooth Low Energy (BLE) Reader. If this box is not checked, the Credential will not work at the BLE reader.</p>
Card Status	
Lost	Use this selection to indicate that a badge has been reported lost. (Not applicable to PIN-Only credentials.)
Stolen	Use this selection to indicate that the credential has been reported stolen.
Disabled	Use this selection to indicate that the badge has been disabled manually or by the system.
Disabled by Inactivity	<p>This read-only field indicates that the credential was disabled by the Disable by Inactivity process. The process sets both the Disabled by Inactivity check box and the Disabled check box to True (<input checked="" type="checkbox"/>) .</p> <p>If you clear (<input type="checkbox"/>) the Disabled check box, the Disabled by Inactivity check box is also cleared, and the Disabled by Inactivity date is recalculated to restart with the current date. The Disabled by Inactivity date is also recalculated to restart with the current date if the Lost or Stolen check boxes are cleared.</p> <p>NOTE: For information, see Disabling Credentials for Inactivity Overview on Page 26.</p>
Expired	This check box is set to True (<input checked="" type="checkbox"/>) when the Expiration date has passed.
Temporary	<p>This check box is set to True (<input checked="" type="checkbox"/>) and is read-only if the Credential is a Temporary Credential.</p> <p>New Credentials created with the Credential editor are always Temporary and cannot be changed to regular Credentials in the Credential editor.</p> <p>With Existing Credentials (both regular and Temporary) created via the Personnel Credentials tab, you can change the Temporary setting, so it is possible to change a Temporary Credential to a regular Credential and vice-versa.</p> <p>However, you cannot change an Unassigned Temporary Credential to a regular Credential.</p>
Extended Fields	
Agency Code	Identifies the government agency issuing the credential.
System Code	Identifies the system in which the card is enrolled and is unique for each site.
Credential Series	This field is available to reflect major system changes.
Credential Issue	A value that is set to '1' the first time a card is issued, and is incremented by one whenever a replacement card is issued. The code can be up to 20 digits in length, but the usual length in a government card format is 1 digit.
HMAC	<p>Hash Message Authentication Code. This value is unique for each card record, and is calculated by smart card readers based on card data, the site key, and the hashing algorithm used by the reader.</p> <p>The HMAC for a card can be different based on the reader type at which the card is presented because different reader manufacturers use different hashing algorithms. As a result, you may have to configure multiple card records for a given physical card if that card will be used for access at multiple reader types.</p> <p>Set this value to 0 for non-extended cards.</p>
CardInt1-CardInt4	CardInt fields are user-named fields provided for proprietary extended card fields that you may use at your site.

Credential General Tab Definitions (continued)

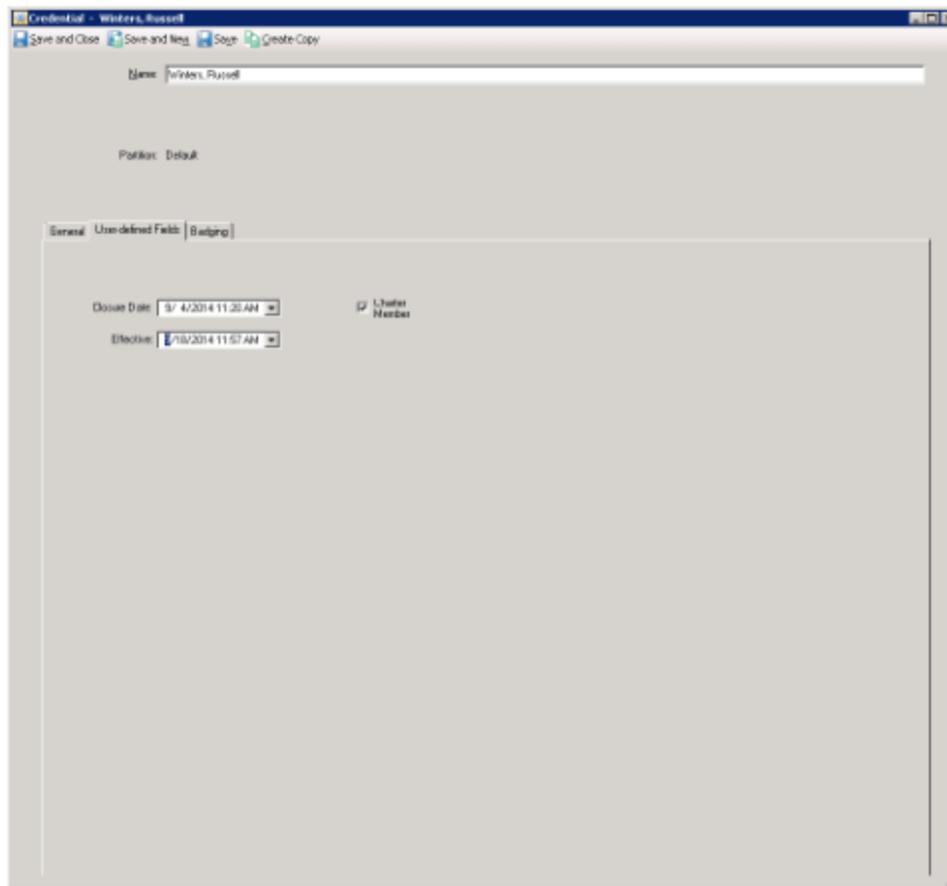
Field/Button	Description
CHUID	<p>The Card Holder Unique Identifier (CHUID) is a number generated by the system, based on the CHUID Format and the values in other credential fields.</p> <p>The CHUID has an 80-Digit Maximum and a 10-Digit Minimum. It must have an even number of digits. All CHUIDS in the system, regardless of the format used, must have the same length, so CHUIDs using a shorter CHUID Format are padded with 0s.</p>
PIN Credential	
PIN	<p>PIN (Personal Identification Number) is a number assigned to a cardholder. The cardholder uses this PIN at keypads when required. Use this field only if your card readers have keypads.</p> <p>This PIN field on the Credentials tab is used for PIN-only access credentials. If you are using a General PIN, the PIN is displayed on the General tab.</p>
Miscellaneous	
Personnel Identifier	<p>A number field usually used in Government extended format access cards. This field is optional and it need not have a unique value. Its maximum size can be 9223372036854775807.</p> <p>It can be included in a CHUID Format, in which case its length may be limited by the CHUID format.</p>
Association Category	<p>A number field usually used in Government extended format access cards. This field is optional, and it need not have a unique value. Its maximum size can be 9223372036854775807.</p> <p>It can be included in a CHUID Format, in which case its length may be limited by the CHUID format.</p>
Organizational Category	<p>A number field usually used in Government extended format access cards. This field is optional, and it need not have a unique value. Its maximum size can be 9223372036854775807.</p> <p>It can be included in a CHUID Format, in which case its length may be limited by the CHUID format.</p>
Organizational Identifier	<p>A number field usually used in Government extended format access cards. This field is optional, and it need not have a unique value. Its maximum size can be 9223372036854775807.</p> <p>It can be included in a CHUID Format, in which case its length may be limited by the CHUID format.</p>
Buttons	
 (Generate a Unique Random Card Number)	<p>Click this button to assign a unique random card number to this credential. This card number contains up to the maximum number of digits for the CHUID format chosen for the credential. For example, the default 'Card Only' CHUID format generates card numbers with no more than ten digits.</p> <p>Three fields are filled in when Generate Unique Random Card Number is pressed:</p> <ul style="list-style-type: none"> • The Card Number field in the Credentials data grid. • The read only Card Number field • The read only CHUID format field <p>This behavior is the same as if a manual entry had been made into the Card Number field of the Credentials data grid.</p>
Validate CHUID Uniqueness	<p>Click this button to check whether the CHUID for this Personnel record is unique. A dialog box appears that displays the CHUID and states whether it is valid (unique) or not.</p>
Auto Generate	<p>Click this button to generate a unique PIN number for a PIN-Only credential. When you click the button, a dialog appears to show you the generated PIN. This is the only time the PIN is displayed, so you need to communicate it to the person who will be using the PIN. If you click the button again, a new PIN is generated to replace the previous one.</p> <p>If a person forgets their PIN, you must replace it with a new PIN. The PIN is encrypted when stored in the database, and there is no way to look it up.</p> <p>This button is available only if you are editing a PIN-Only credential.</p>

Credential User-defined Fields Tab

The Credential User-defined Fields tab displays the User-defined fields related to Credentials. This tab initially is blank, but when User-defined fields for Credentials are configured, they are displayed on this tab.

All of the User-defined fields for Credentials are auto-arranged on the tab. There is no capability to edit or re-arrange the fields.

Figure 37: Credential User-defined Fields Tab



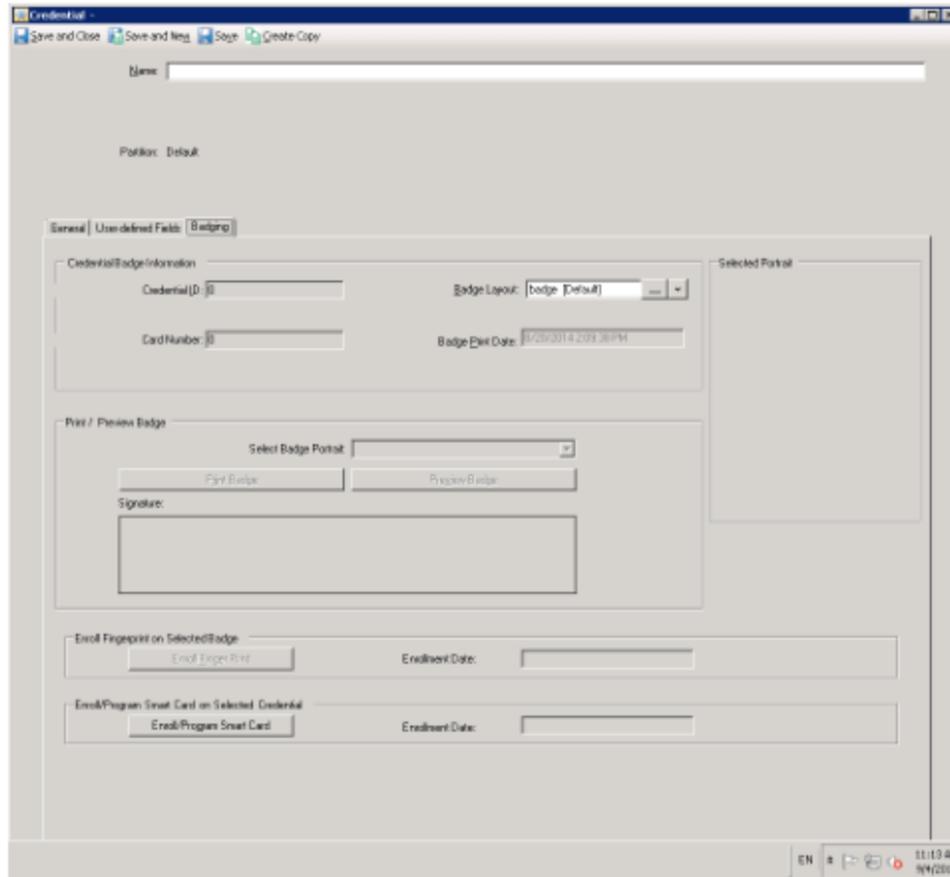
Credential Badging Tab

The Credential Badging tab displays the badging fields for a single Credential. These fields are also displayed on the Personnel Badging tab, except that the Personnel Badging tab can display field values about all of a person's badges.

See [Personnel Badging Tab Definitions](#) on [Page 77](#) for definitions of the fields on the Credential Badging tab.

For a Temporary Credential, you can use the functions on the Badging tab to configure and print a physical badge to go with the Temporary Credential.

Figure 38: Credential Badging Tab



Temporary Credential Tasks

You can perform the following tasks with the Credential editor to configure Temporary Credentials.

- [Managing Temporary Credentials on Page 140](#)
- [Creating a Temporary Credential on Page 141](#)
- [Assigning a Temporary Credential on Page 142](#)
- [Activating a Temporary Credential on Page 143.](#)
- [Using Temporary Credentials for Anonymous Visits on Page 144](#)
- [Emailing Reminders to Return Temporary Credential on Page 145](#)
- [Returning a Temporary Credential on Page 146](#)
- [Marking a Temporary Credential as Lost or Stolen on Page 147](#)
- [Deleting an Object on Page 25](#)
- [Searching for Credentials on Page 128.](#)

Managing Temporary Credentials

You can use Temporary Credentials to manage lost or stolen access cards, and to manage access cards for employees who need temporary access at a site.

For information about using Temporary Credentials with Visitor Management, see the *C•CURE 9000 Visitor Management Guide*.

Workflow for Managing Temporary Access Cards

The following is an example of a workflow for managing Temporary Credentials. (This is presented only as an example to help a site to formulate its own policy.)

Table 22: Temporary Credentials Workflow

Action	See...
Establish a reserve of Temporary Credentials for use when Employees forget or lose their access cards. Optionally, if you want to assign Temporary Credentials to anonymous visitors, you can create Personnel records to which you can attach Temporary Credentials and re-use these Personnel records and credentials for subsequent visits.	Creating a Temporary Credential on Page 141 Using Temporary Credentials for Anonymous Visits on Page 144
Set the Temporary Credentials to expire after a predetermined period, so that un-returned Temporary Credentials cannot be used after that Expiration Date. You can set the Expiration Date and Time when you create the Credential, or when you Activate it.	Creating a Temporary Credential on Page 141 Activating a Temporary Credential on Page 143
Use Quick Search to display a dynamic view of Personnel when an employee needs a temporary card.	Performing a Personnel Quick Search on Page 30
Right-click on the person and select Assign Temporary Credentials , and select an Unassigned credential from the dialog box that appears.	Assigning a Temporary Credential on Page 142

Table 22: Temporary Credentials Workflow (continued)

Action	See...
Email a reminder to a person with a Temporary Credential when the agreed upon date for returning the credential approaches. Right-click on an activated Credential and select Email Reminder . (Only available if the person's email address is entered in their Personnel record.)	Emailing Reminders to Return Temporary Credential on Page 145
When the person returns the card, use Quick search to display a dynamic view of Personnel including the person. Right-click on the person and select Return Temporary , and a dialog box appears to confirm that the credential has been returned. The Temporary Credential is now Unassigned , and available for use by another person.	Returning a Temporary Credential on Page 146
Determine which Personnel have not returned Temporary Credentials after the agreed upon period, using the Credential Quick Search field Cards Issued On or Before (date) .	Searching for Credentials on Page 128
If a person has not returned the credential by an agreed upon date, you can mark the Temporary Credential as Lost or Stolen to prevent its further use. You can also use the Expiration Date setting to expire an un-returned Temporary Credential to prevent its further use. If the Temporary Credential is eventually returned, you can clear the Lost or Stolen Card Status, or change the Expiration Date/Time to make the card usable again.	Marking a Temporary Credential as Lost or Stolen on Page 147 Creating a Temporary Credential on Page 141

Creating a Temporary Credential

You can create a Temporary Credential using the Credential editor.

Note that the **Card Status Temporary** field is selected and read-only - you can create only Temporary Credentials in this manner.

To Create a Temporary Credential

1. Click the **Personnel** pane button in the Administration Station.
2. Select **Credential** from the drop-down list in the Personnel pane toolbar.
3. Click **New** to open the Credential editor.
4. Enter a name for the Credential in the **Name** field.
5. Fill in the Fields such as **Card Number**, **Facility Code**, and **Issue Code** as needed.
6. Select the **CHUID Format** for the card.
7. Set the **Activation** and **Expiration Dates** to meet your needs. For a Temporary Credential, you may wish to set a short duration, such as 5 days (so that a card that is not returned automatically expires) by making the Expiration Date 5 days after the Activation Date.
8. Click **Save and Close** to save your settings and close the Credential editor.

Alternatively you can choose:

- **Save and New** - Click to save the current Credential and have the Credential editor stay open so that you can create a new credential.

- **Save** - Click to save all changes to the credential you are editing. The Credential editor remains open.
- **Create Copy** - Click to create a copy of the Credential being edited. If you have not saved the original, a prompt is displayed asking whether to save the original before creating a copy of the Credential. The **Name**, **Credential ID**, and **Card Number** fields are blanked, but the values in other fields are retained.

Assigning a Temporary Credential

You can assign a Temporary Credential to a Personnel record as a temporary replacement for a lost or stolen access card that can be set up with a managed activation time span, and tracked when returned (or not returned).

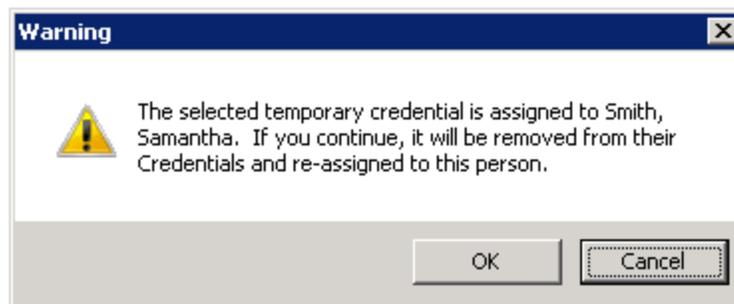
The **Assign Temporary Credential** context menu selection also activates the credential, so you can assign and activate in one step.

When temporary credentials are assigned and activated in this way, the expiration date is set according to the Temporary Credential Activation default (see [System Variables for Credentials](#) on [Page 148](#)).

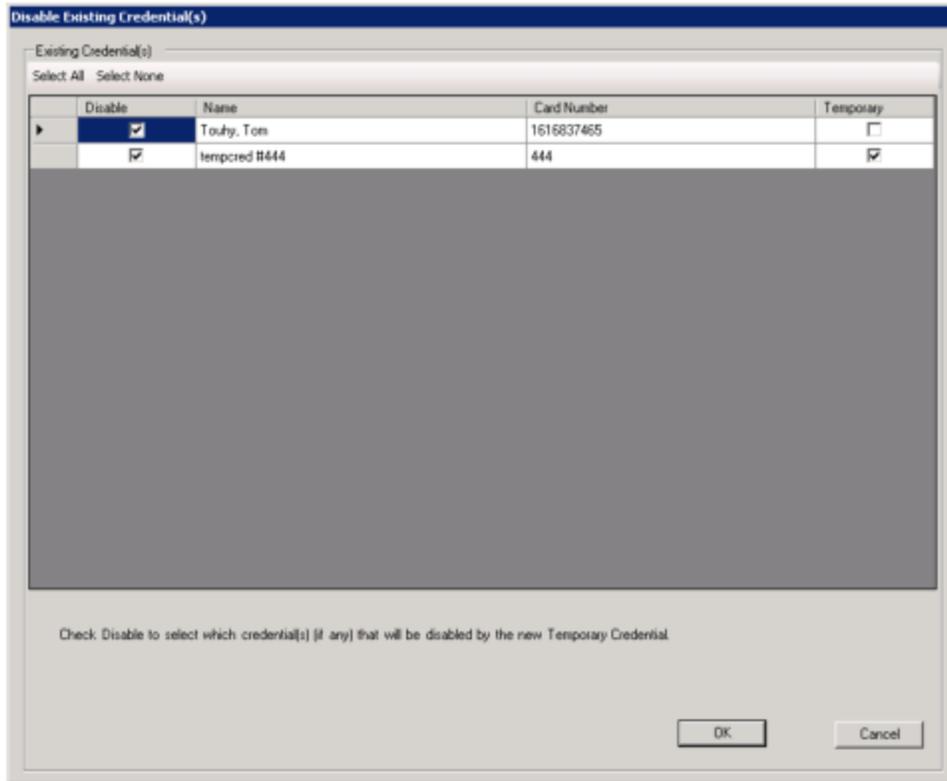
To Assign Temporary Credentials to a Person

1. Use the Personnel pane Quick Search to find the person's Personnel record on a Personnel Dynamic View. See [Performing a Personnel Quick Search](#) on [Page 30](#).
2. Right-click on the person in the Personnel Dynamic View.
3. Select **Assign Temporary Credential**. A Name Selection dialog box appears.
4. Select a Temporary Credential that is **Unassigned** from the dialog box.

(You can select a Temporary Credential that is **Assigned** or **Activated**, but if you do so, a Warning appears stating that the credential will be removed from the person it is currently assigned to if you click **OK**. Or you can **Cancel**, and repeat this step to choose a different credential.)



5. If this person has one or more currently active Credentials, a dialog box appears to let you choose whether to mark one or more of those Credential as **Disabled** when the new Temporary Credential is added to the Personnel record. Select or clear the check box(es) and click **OK**, or click **Cancel** to cancel assigning the temporary Credential.



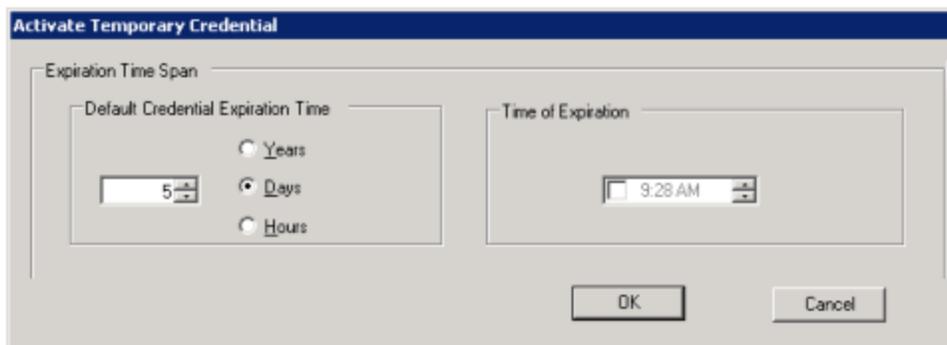
- If needed, you can manually change the Card Status of the now Disabled Credential to **Lost** or **Stolen**, and the **Lost and Stolen Cards** count will be incremented when you save the Personnel record.

Activating a Temporary Credential

You can activate a Temporary Credential that is **Assigned** to a person, so that the Credential can be used for access.

When you select **Activate Credential** from the Credential or Personnel Dynamic View context menu, an Activate Temporary Credential dialog box opens to allow you to set the Expiration Time Span (the amount of time the Credential remains active) for the Temporary Credential).

Figure 39: Activate Temporary Credential Dialog Box



The default value for the **Expiration Time Span** is determined by the system variable **Temporary Credential Activation Default**. See [System Variables for Credentials](#) on [Page 148](#) and the *C•CURE 9000 System Maintenance Guide* for more information on System Variables.

Table 23: Activate Temporary Credential

Field/Button	Description
Default Credential Expiration Time	Type a number or use the <input type="text"/> to raise or lower the value. The maximum allowed activation time for a temporary credential is 5 Years (equivalent to 1825 days or 43,800 hours).
Years, Days, Hours	You can set the duration to Years, Days, or Hours.
Time of Expiration	You can specify the Time of Expiration for the Credential by checking the box and typing in a date or using the <input type="text"/> to raise or lower the value. You can only specify the time of expiration if Years or Days is selected. If Hours is selected the ability to specify the time is disabled.
OK	When you click OK , the Temporary Credential is activated. The Issue Date set to today and the Expiration Date is set to the number of days in the future specified.
Cancel	If you click Cancel , the Credential is not modified.

Using Temporary Credentials for Anonymous Visits

You can use Temporary Credentials to set up access for anonymous Visitors if you do not want to create dedicated Personnel records for these visitors. You can create a pool of Personnel records set aside for anonymous visitors, and re-use them whenever visitors arrive.

To Configure Access for Anonymous Visits

1. Prior to visitor arrival, create a number of new Personnel records so that you will have a Personnel record for each visitor.

Example:

"Anon, Visitor #1", "Anon, Visitor #2", "Anon, Visitor #3".

2. Add the appropriate Clearances to each visitor Personnel record.
3. Use **Add Card Access** in each visitor Personnel record to create an access card, and set the Card Status to Disabled and Temporary. This ensures that you have a Temporary Credential for each visitor Personnel record, named accordingly, so it is recognizably associated with each visitor Personnel record. The card is disabled so that it cannot be used until activated.

Example:

"Anon, Visitor #1" has a Credential named "Anon, Visitor #1", etc.

4. **Save and Close** each visitor Personnel Record.

5. When one or more visitors arrive, issue them the access cards that correspond to the visitor credentials, and use either the Credential or Personnel Dynamic View context menu to **Activate Temporary Credential**. This removes the **Disabled Card Status** and makes the cards ready to use.
6. When the visitors return the access cards and leave, use the Credential or Personnel Dynamic View context menu to **Return Temporary Credential**, changing the Status back to **Assigned** and **Disabled**, so that the Credentials are available for subsequent visitors.
7. When new visitors arrive, re-issue the access cards and use (**Activate Temporary**) to activate the cards for the new visitors.

Emailing Reminders to Return Temporary Credential

You can Email a reminder to personnel who have **Activated** or **Assigned** Temporary Credentials that they need to return their temporary access card.

This selection is only available for Personnel records that have an **Email address** on the Personnel General tab.

This selection can be used with multiple selections, and an Email failure of one or more selections does not stop the attempt for other selections.

You can also create and schedule an Event to send out Email reminders for Temporary Credentials. See [Credentials Event Actions](#) on [Page 149](#) for more information.

You can use Quick Search for Credentials to show the Temporary Credentials that are **Activated** and have **Cards Issued On or Before** a date you specify, identifying the cards that are appropriate for an Email Reminder.

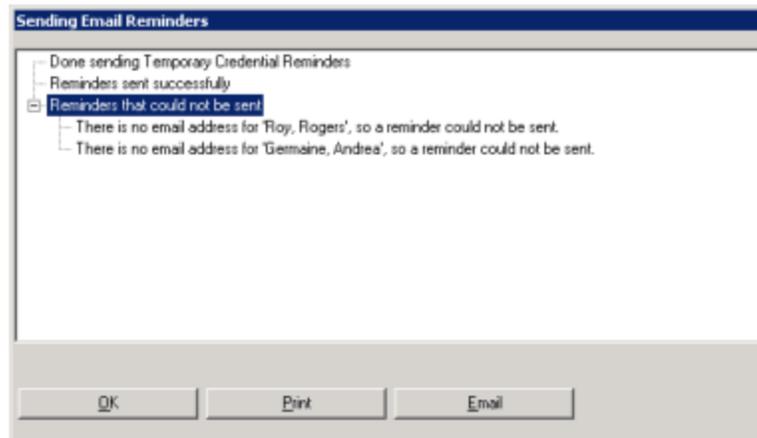
The Email Reminder sent to a person assigned to the Temporary Credential states:

"You were provided a temporary card on <issue date>. Please return the card at your earliest convenience."

The <issue date> field is filled in with the appropriate value, and the email is sent to the email address for the current owner as shown on their Personnel screen.

To Send an Email Reminder to Return Temporary Credentials

1. Follow the steps for [Performing a Credential Quick Search](#).
2. Select **Cards Issued On or Before** and click the drop-down arrow to select a date that is "N" days prior to the current date.
3. Select **Activated** from the **Status** drop-down list.
4. Select **Is Temporary Credential** and click .
5. The result will be a Dynamic View listing all Temporary Credentials that are still activated after "N" days.
6. Select the rows in the Dynamic View to which you want to send an Email Reminder.
7. Right-click and select one or more rows in the list and choose **Email Reminder**.
8. The Sending Email Reminder dialog box appears to confirm that Email was sent, or listing the personnel to whom a reminder could not be sent.



Returning a Temporary Credential

You can return an Activated Temporary Credential, making it **Unassigned** and available to be assigned to another Personnel record.

You would perform this action when the person assigned this Temporary Credential no longer needs it.

- The person is an employee who lost their access card, and needed a Temporary Credential until their card was replaced.
- (For Visitor Management only) The person is a visitor who was assigned a Temporary Credential during a visit, and has finished the visit (no longer needs an access card).

To Return a Temporary Credential from the Credential Dynamic View

1. Click the **Personnel** pane button in the Administration Station.
2. Select **Credential** from the drop-down list in the Personnel pane toolbar.
3. Select the **Is Temporary Credential** check box in the Quick Search panel.
4. Click  to open a Dynamic View showing all Temporary Credentials.
5. Select the Temporary Credential you wish to return to **Unassigned** Status.
6. Right-click to open the context menu and select **Return Temporary**.

To Return a Temporary Credential from the Personnel Dynamic View

1. Click the **Personnel** pane button in the Administration Station.
2. Select **Personnel** from the drop-down list in the Personnel pane toolbar.
3. Enter the person's name (full or partial) in the Quick Search panel.
4. Click  to open a Dynamic View showing all Personnel that match the Quick Search criteria.
5. Select the person whose Temporary Credential you wish to return to **Unassigned** Status.
6. Right-click to open the context menu and select **Return Temporary**.

Marking a Temporary Credential as Lost or Stolen

You mark a Temporary Credential as either **Lost** or **Stolen**, making it unavailable to be assigned or activated for access.

You would perform this action when the person assigned this Temporary Credential:

- Reports the Temporary Credential Lost or Stolen.
- Has not returned a Temporary Credential by the agreed upon date.

A **Lost** or **Stolen** credential that is used in an attempt to gain access will be rejected.

To Mark a Temporary Credential Lost or Stolen from the Credential Dynamic View

1. Click the **Personnel** pane button in the Administration Station.
2. Select **Credential** from the drop-down list in the Personnel pane toolbar.
3. Select the **Is Temporary Credential** check box in the Quick Search panel.
4. Click  to open a Dynamic View showing all Temporary Credentials.
5. Select the Temporary Credential you wish to mark as **Lost** or **Stolen** Status.
6. Right-click to open the context menu and select either **Lost** or **Stolen**.

System Variables for Credentials

Several System Variables in the Personnel category have an effect on Credentials. See the *C•CURE 9000 System Maintenance Guide* for more information on these System Variables.

Maximum Cards Per Person

This system variable lets you set the number of cards that you can add to a single person record. The number must be between 1 and 5.

Temporary Credential Activation Default

This system variable defines the default in days that a newly activated Temporary Credential remains active. When you activate a Temporary Credential, you can choose to change this default on the Activate Temporary Credential dialog box. See [Activating a Temporary Credential](#) on [Page 143](#).

Timespan of Expiration

This system variable allows you to specify the time period past the creation date to use for the default expiration date of a new credential. The **Default Credential Expiration Time** is expressed in Years, Days, or Hours. When Years or Days is selected, you can specify the **Time of Expiration** - the time of day that Expiration occurs.

Example:

If you set the **Default Credential Expiration Time** to 5 Years and the **Time of Expiration** at 2:30 PM, a Credential you create will by default expire after 5 Years, at 2:30 PM.

You can change the Timespan of Expiration for a Temporary Credential when you activate it (see [Activating a Temporary Credential](#) on [Page 143](#)).

You can also change the default Timespan of Expiration for a Personnel Type by editing it (see [Personnel Type Overview](#) on [Page 100](#)).

Extend Maximum Cards Per Person

This system variable, if set to **True**, specifies that Credentials with a status of **Lost**, **Stolen**, or **Disabled** do not count against the limit set by the system variable **Maximum Cards Per Person**.

For example, if a Person has 2 active Credentials and 3 Lost Credentials on a system with a **Maximum Cards Per Person** limit of 3, one more Credential could be added to the Personnel record.

If **False**, all Credentials count against the limit set by the system variable **Maximum Cards Per Person**.

Credentials Event Actions

The following actions for managing Temporary Credentials are available for configuration in Events.

Mark Unreturned Temporary Credentials Lost

This action is used to automate the process of marking un-returned Temporary Credentials as **Lost**. Credentials marked **Lost** through this action are treated by C•CURE 9000 as if they were marked **Lost** in the Personnel editor.

You can create an Event and schedule it to run periodically to invoke this action. The action has a field called **Number of unreturned days** that you can set so that any Temporary Credential that has been Assigned or Activated but not returned after that many days is considered lost.

Marking a Temporary Credential as **Lost** disables the credential and makes it useless for accessing the site.

When activated, this action searches for all Temporary Credentials that have not been returned for **Number of unreturned days** (or longer), and marks each as **Lost**.

The Personnel record's **Lost Credentials** count is incremented by this action.

Mark Unreturned Temporary Credentials Stolen

This action is used to automate the process of marking un-returned Temporary Credentials as **Stolen**. This action functions identically to **Mark Unreturned Temporary Credentials Lost**, except it marks the Temporary Credential as **Stolen** instead of **Lost**. This action gives an additional option for handling un-returned credentials. If marked as **Stolen**, the Temporary Credentials are not removed from the Personnel record.

Email Reminders for Unreturned Temporary Credentials

This action is used to automate the process of sending email reminders for un-returned Temporary Credentials. The action has a field called **Number of unreturned days**, which is the number of days that the Temporary Credential has been assigned and not returned.

The action locates each Temporary Credential that has not been returned past the specified number of days and sends an email to the email address associated with the assigned Personnel record reminding them to return the credential.

If a Personnel record does not have an associated email address, no email can be sent.

Custom Clearance

A Custom Clearance is a clearance that gives unique access, individualized by person, to Doors/Door Groups and Elevators/Elevator Groups. Custom Clearances are configured from a **Custom Clearance** tab in the C•CURE 9000 Personnel Editor. The Custom Clearance View allows you to view a list of all Custom Clearances in the system, and sort, filter and group the list. You can then open the Personnel Editor to edit the Personnel record that contains a given Custom Clearance.

In this chapter

Custom Clearance View152

Custom Clearance View

The Custom Clearance selection from the Personnel pane lets you display a Dynamic View that lists all Custom Clearances in the system. Custom Clearances are unique individualized clearances for Doors/Door Groups and Elevators/Elevator Groups that are associated with specific Personnel records in the system.

Tasks that you can perform using the Custom Clearance View are explained in [Custom Clearance Tasks](#) on [Page 152](#).

The Custom Clearance View shows the columns listed by default in [Table 24](#) on [Page 152](#). You can right-click a column heading to choose additional columns to display.

Table 24: Custom Clearance View Definitions

Columns	Description
Personnel Name	The full name of the person who owns this Custom Clearance.
Access Type	This column displays the type of access each Custom Clearance gives—whether Door, Door Group, Elevator, or Elevator Group.
Clearance Item Name	Displays the name of the Custom Clearance.
Schedule Name	Displays the name of the schedule during which this Clearance gives access.
NOTE: In an Enterprise Environment, the Partition Name column also displays by default. It shows the Partition that the Custom Clearance belongs to—whether Global or a specific local partition on the SAS.	

NOTE

One of the additional columns you can choose to display is 'Name'. It displays a system-generated name for the Custom Clearance that is used on the Privilege Editor Exceptions tab.

Example:

CC_(5001-376064978)

Custom Clearance Tasks

You can perform the following task related to one or more Custom Clearances.

- [Personnel Object Tasks](#) on [Page 18](#)
- You can also have expired Custom Clearances removed from a person's record by creating an Event with a **Remove Expired Custom Clearance from Personnel** Action. For information, see [Removing an Expired Custom Clearance from a Personnel Record](#) on [Page 153](#)

Using the Custom Clearance View Context Menu

The Custom Clearance View context menu opens when you right-click on one or more Custom Clearances in the Dynamic View of Custom Clearances.

You can select one or more Custom Clearances in the Dynamic View (using multiple selection combinations such as **SHIFT+Left-click** and **CTRL+Left-click**) and perform one of the following functions supported on the Custom Clearance View context menu: Edit, Set Property, Export Selection, Find in Audit Log, and Delete. See [Using the Object List Context Menu](#) on [Page 23](#) for information about using the context menu.

Removing an Expired Custom Clearance from a Personnel Record

You can create Events with a **Remove Expired Custom Clearance from Personnel** Action to delete Custom Clearances with expired date/times from Personnel records. This allows you to automatically clean up expired Custom Clearances from people's records. The Event can be configured to run either on a schedule or on demand.

NOTE

In an Enterprise Environment, Custom Clearances assigned to a:

- Global Personnel record are always **global**.
- Local Personnel record are always **local**.

Consequently, to remove them you must create the following:

- A separate Event at each local SAS to remove an expired **Local** Custom Clearance.
- An Event on the MAS to remove an expired **Global** Custom Clearance.

To Create an Event to Remove Expired Custom Clearances

1. In the Navigation Pane of the Administration Client, click **Configuration** to open the Configuration pane and select **Event** from the pane drop-down list.
2. Click **New** to open the **Event Editor**.
3. Give the Event an appropriate name and description and enable it.
4. Configure it as you wish on the **General**, **Options** and other **Event Editor** tabs. For information, see "Configuring an Event" in the *C•CURE 9000 Software Configuration Guide*.

Example:

- On the **General** tab, you can arm the Event, set its **Priority**, and create a **Schedule** for it.
 - On the **Options** tab, you can choose to have any Event state changes sent to the **Journal** and/or **Monitoring Station** and require the Event to be acknowledged.
5. On the **Event Action** tab, click **Add** to create a new Action for the Event.
 - In the **Action** field, click the down-arrow and scroll down to select **Remove Expired Custom Clearance from Personnel** from the list.
 6. Click **Save and Close** to accept the selections you have made and save the Event.

- or -

Click **Save and New** to accept the selections you have made, save the Event, and keep the Event Editor open to create another Event.

- or -

Click **Cancel** to discard your selections.

Images

The Images Editor in C•CURE 9000 lets you import, name and store images that you want to use as dynamic images on badge layouts.

In this chapter

Images Editor156

Images Editor

The Images editor selection from the Personnel pane lets you import, name and store images that you want to use as dynamic images on badge layouts.

Tasks that you can perform using the Images Editor are explained in [Images Tasks on Page 156](#).

Definitions for Images Editor fields and button are covered in [Images Definitions on Page 159](#).

When you display a Dynamic View that lists all images, the list includes the following three types of Images:

Table 25: Personnel Image Types

Image Type	Description
System	These images are used by C•CURE 9000 and cannot be modified or deleted.
Dynamic Badge Image	These are images that you have imported from files using the Images Editor. See Importing an Image on Page 156 .
Portrait	These are images that you imported or captured on the Personnel Images tab to use as badge portraits.

Images Tasks

You can perform the following task related to Images.

- [Personnel Object Tasks on Page 18](#)
- [Importing an Image on Page 156](#)

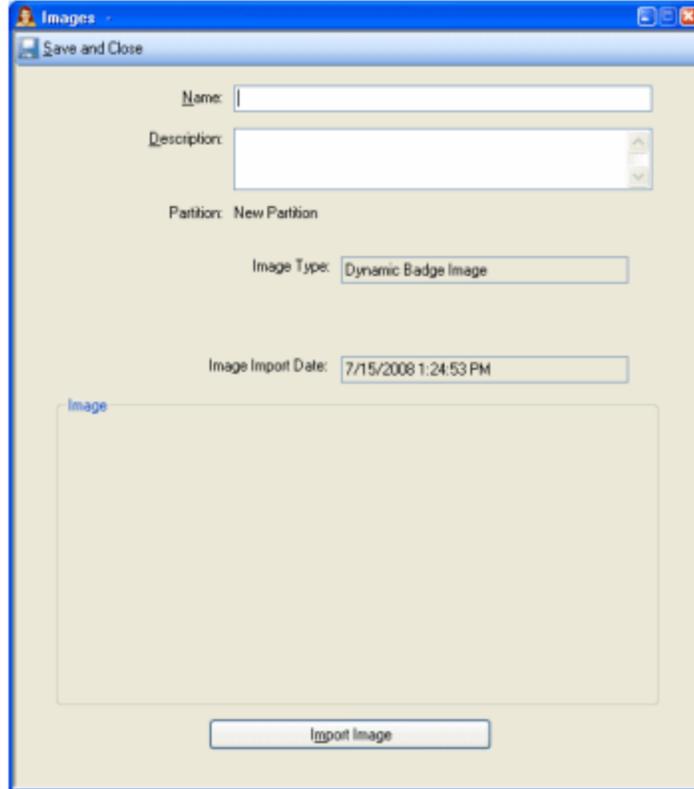
Importing an Image

You can import images into the C•CURE 9000 database for use with badges and Personnel records. After you import an image, you can add it as a dynamic image to a badge layout, and then print a badge that uses that image.

To Import an Image

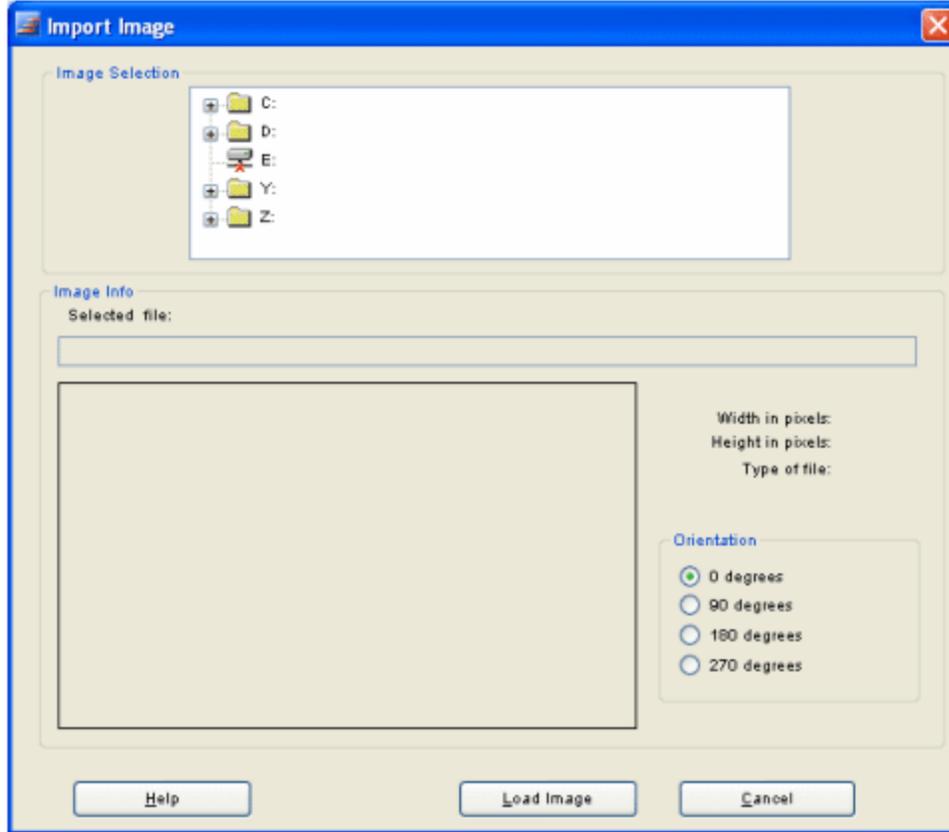
1. In the Navigation Pane of the Administration Workstation, click **Personnel** to open the Personnel pane.
2. Select **Images** from the Personnel pane drop-down list.
3. Click **New** to create a new Image object. The **Images** Editor opens (see [Figure 40 on Page 157](#)).

Figure 40: Images Editor



4. In the **Name** field, type a name for the Image object.
5. In the **Description** field, type a textual description that will help to identify this object.
6. Click **Import Image**. The **Import Image** dialog box appears (see [Figure 41](#) on [Page 158](#)).

Figure 41: Import Image Dialog Box



7. Click the Image Selection tree to navigate to the file you want to import.
8. Click the image file you want to import, and a preview of the image file appears.
9. Click one of the Orientation options to rotate the image, if desired.
10. Click **Load Image**. The **Save Image** dialog box opens (see [Figure 42](#) on [Page 158](#)).

Figure 42: Save Image Dialog Box



11. You can use the cropping selection box to select the portion of the image to import. You can resize the cropping selection box by clicking and dragging any of the box's corners.
12. Click **Save** to save the image. The image appears in the Image area on the Image Editor.
13. Click **Save and Close** to save the imported image.

Adding a Dynamic Image to a Badge Layout

To add an imported image to a badge as a Dynamic Image (a graphic on the badge that can be varied on a per badge basis), you need to import the image, name the image, enter the image name into a customer field in one or more Personnel records, and specify that customer field as the source for the dynamic image in the badge layout.

To Add a Dynamic Image to a Badge Layout

1. Import an Image (see [Importing an Image on Page 156](#)) and save the image with a Name. For this example, name the image "Badge Image".
2. Launch the C•CURE ID Badge Designer. See [Badge Layout Editor on Page 162](#).
3. Drag the Image icon to the badge layout and position the image object where you want it on your badge layout.
4. In the Image Processing Panel, click **Dynamic Filename**, and select a customer field (Text 1 - Text11) to be the source for the Dynamic Image. For example, choose **Text2** to be the field you will use for dynamic images.
5. For each Person's badge that you want the image to appear on, use the Personnel Editor (see [Personnel Editor on Page 37](#)) to edit the text field and type in the name of the imported image object that you saved. For this example, type in **Badge Image**.
6. Click **Save and Close** to save the Personnel record.
7. Repeat Steps 5 and 6 for each badge that you want to include a dynamic image.
8. On the **Personnel Editor Badging** tab, click **Preview Badge** to view a preview of the badge to make sure the dynamic image appears correctly.

Images Definitions

This section defines the fields and buttons on the Images Editor.

Table 26: Images Definitions

Field/Button	Description
Name	Type a name for the image that you are importing.
Description	Type a description that will help you identify this image or its intended usage.
Image Type	The type of image that is being stored. Currently all stored images are Dynamic Badge Images.
Partition	A read-only field displaying the partition to which this Image belongs. This field is visible only if the C•CURE 9000 system is partitioned.
Name of Person	If this image is a Portrait that you captured or imported on the Personnel Images tab, the person to which you assigned this image is listed. This is a read-only field.

Images Definitions (continued)

Field/Button	Description
Image Import Date	Displays the date and time that this image was most recently saved after being imported. This field is read-only and is updated by the system if you re-import a new image into this image object.
Image Size	<p>Displays the size of the image.</p> <p>Measurements are width x height in pixels, uncompressed size in bytes, and compressed size in bytes.</p> <p>Example:</p> <p>If the Image Size field displays: 300 x 244 (219600 [12042])</p> <p>This means the images is:</p> <ul style="list-style-type: none"> • 300 pixels wide • 244 pixels high • 219,600 bytes uncompressed • 12,042 bytes compressed
Image	Displays an image after you import it using the Import Image button.
Import Image	This button opens the Import Image dialog box so you can select an image from a local or network drive, and make adjustments to it. See Importing an Image on Page 156 for more information.
Save and New	Click Save and New when you have completed any changes to the image and wish to save those changes, and you want to create a new Image. The Image you were editing is saved, and a new Image opens (either blank or including template information if you were using a template to create new Images).
Save and Close	Click Save and Close when you have completed any changes to a Card Format and wish to save those changes.
	<p>Click Close when you want to close the Card Format Editor without saving your changes.</p> <p>A prompt appears so that you can choose to continue editing or close the editor. Click OK to close the editor without saving changes, or click Cancel to continue editing the Image.</p>

Badge Layout

This chapter explains how to create badge layouts for access cards in C•CURE 9000 Personnel.

In this chapter

Badge Layout Editor 162

Badge Layout Editor

A Badge Layout is an object that specifies a badge design created using the C•CURE ID Badge Designer, and allows the design to be assigned to a badge credential in a Personnel record. The badge layout also allows you to assign up to three card formats for Magnetic Stripe Encoding, if your access credentials use mag encoding.

The sections provide more information about using the Badge Layout Editor to define Badge Layouts.

- [Badge Layout Tasks](#) on [Page 162](#)
- [Badge Layout Definitions](#) on [Page 165](#)

Badge Layout Tasks

You can perform the following tasks with the Badge Layout Editor.

- [Personnel Object Tasks](#) on [Page 18](#)
- [Launching the Badge Designer](#) on [Page 162](#)
- [Creating a Badge Layout](#) on [Page 163](#)
- [Setting Card Formats for Mag Stripe Encoding](#) on [Page 164](#)

Launching the Badge Designer

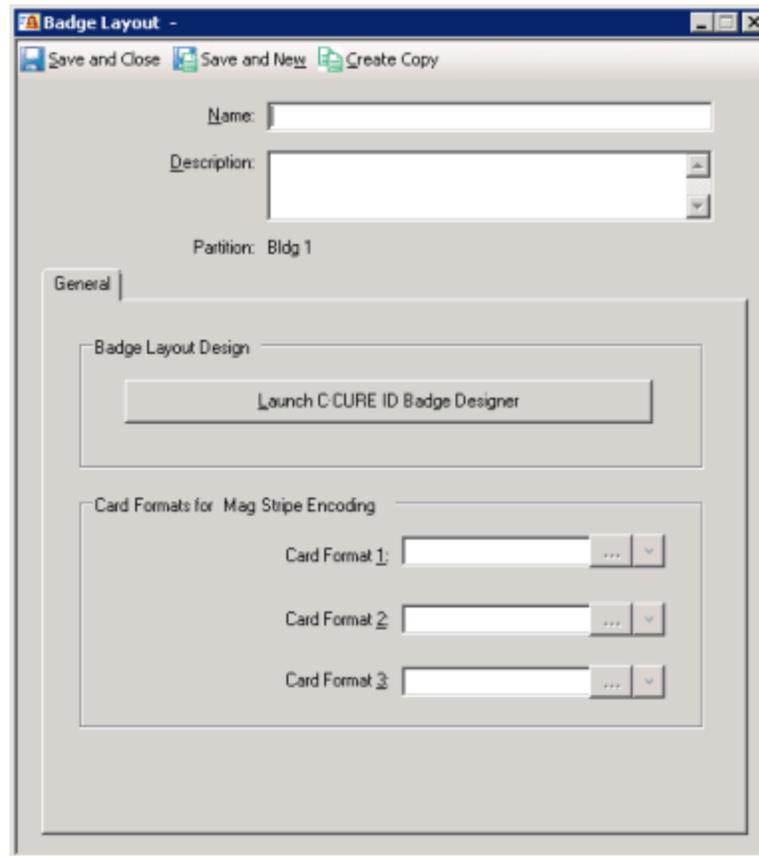
You use the C•CURE ID Badge Designer to create a badge layout, and to edit an existing badge layout.

To Launch the Badge Designer

1. In the **Navigation** Pane of the Administration Workstation, click **Personnel** to open the Personnel pane.
2. Select **Badge Layout** from the Personnel pane drop-down list.
3. Click  to open a Dynamic View listing all Badge Layout objects.
4. Right-click the Badge Layout in the list that you wish to edit, and click **Edit**.

The Badge Layout Editor opens (see [Figure 43](#) on [Page 163](#)).

Figure 43: Badge Layout Editor



5. Click **Launch C•CURE ID Badge Designer** to open the **C•CURE ID Badge Designer**. (See [Figure 44](#) on [Page 164](#)).

Creating a Badge Layout

You can create a new Badge Layout for use with C•CURE ID Badging on C•CURE 9000.

A Badge Layout specifies the badge design that can be assigned to a badge credential in a Personnel record. The badge design is created using the C•CURE ID Badge Designer.

The badge layout also allows you to assign up to three card formats for Magnetic Stripe Encoding, if your access credentials use mag encoding.

You can also create a Badge Layout template if you want to create multiple badge designs based on the same badge properties (such as badge orientation, badge dimensions, background images, Mag Encoding Options, and number of sides). See [Creating an Object Template](#) on [Page 18](#).

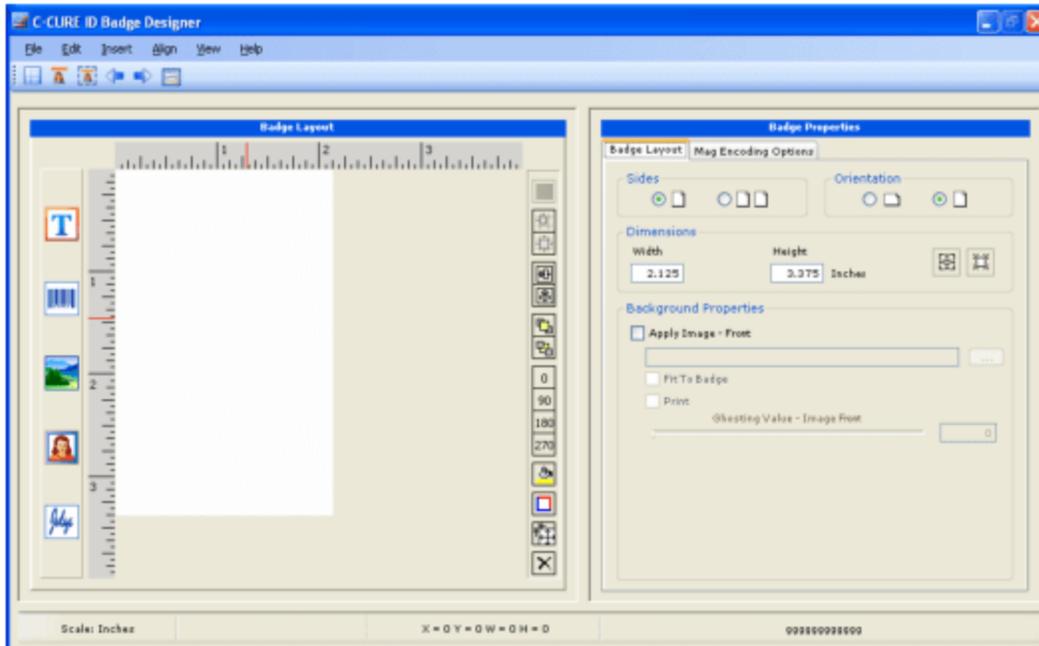
Example:

If you want to create a badge with a corporate logo, but have variants of the design for day shift employees, night shift employees, temporary employees, and security personnel, you could create a badge template with the basic design, and then create additional badge layouts using the template as a basis, but with a different color background for each of the badge types.

To Create a Badge Layout

1. Create a Badge Layout object (see [Creating an Object on Page 18](#)).
2. To create a badge design (the actual layout of fields and graphics on an access card) click Launch CCURE ID Badge Designer.
3. The C•CURE ID Badge Designer appears. (See [Figure 44 on Page 164](#).)

Figure 44: C•CURE ID Badge Designer



4. If you have specified Magnetic Stripe encoding on the badge design, you can assign card formats to the badge layout. Otherwise **Card Format 1**, **Card Format 2**, and **Card Format 3** are unavailable. See [Setting Card Formats for Mag Stripe Encoding on Page 164](#) for more information.
5. To save your new Badge Layout, click **Save and Close**.

Alternatively, if you want to save the Badge Layout and then create a new one, click **Save and New**. The current Badge Layout is saved and closed, but the Badge Layout Editor remains open to allow you to create a new Badge Layout.

Setting Card Formats for Mag Stripe Encoding

If your access badges use Magnetic Stripe Encoding for access or other purposes, you need to specify how many Magnetic Tracks are encoded on each badge, and which format each track represents.

To accomplish this, you need to do the following:

- From the **Badge Designer**, define the number of magnetic tracks on the badge design.
- From the **Badge Layout Editor**, specify the Card Formats for each track on the Badge Layout.

To Set Card Formats for Mag Stripe Encoding

1. In the **C•CURE ID Badge Designer**, specify the Magnetic Stripe encoding options you wish to use. You can specify either two magnetic tracks or three magnetic tracks, and the data that is encoded on each track.
2. Save your badge design and exit the **C•CURE ID Badge Designer**. You are returned to the **Badge Layout Editor**.
3. For each magnetic track that you defined on the badge design, select a card format for the data to be encoded on that magnetic track. Click for the card format you want to specify, and select a Card Format from the selection dialog box that appears. (Only Card Formats that are valid for magnetic stripe encoding are listed. If the list is empty, you need to create or modify a Card Format to support magnetic stripe encoding. See the *C•CURE 9000 Card Formats and Smart Card Keys Guide* for information.)
4. To save your Badge Layout, click **Save and Close**.

Badge Layout Definitions

This section defines the fields and buttons on the **Badge Layout Editor General** tab.

Table 27: Badge Layout Editor Definitions

Field/Button	Description
Name	Type a name for the badge layout. Each badge layout must have a unique name.
Description	Type a text description for the Badge Layout. This description is visible in the Dynamic View list of Badge Layouts, so it can be useful in distinguishing one badge layout from another.
Launch C•CURE ID Badge Designer	Click this button to open the C•CURE ID Badge Designer application, so that you can design the specific layout of a badge.
Partition	A read-only field displaying the partition to which this Badge Layout belongs. This field is visible only if the C•CURE 9000 system is partitioned.
Card Format 1	Specifies the card format used for encoding the magnetic stripe on the card, if used. If you have specified a magnetic card stripe as part of your badge design in the C•CURE ID Badge Designer, you can click to pick a card format for Magnetic Stripe 1. If you are not using Magnetic Stripe encoding, this selection is unavailable.
Card Format 2	Specifies the card format used for encoding the magnetic stripe on the card, if used. If you have specified a magnetic card stripe as part of your badge design in the C•CURE ID Badge Designer, you can click to pick a card format for Magnetic Stripe 2. If you are not using Magnetic Stripe encoding, this selection is unavailable.
Card Format 3	Specifies the card format used for encoding the magnetic stripe on the card, if used. If you have specified a magnetic card stripe as part of your badge design in the C•CURE ID Badge Designer, you can click to pick a card format for Magnetic Stripe 3. If you are not using Magnetic Stripe encoding, this selection is unavailable.
Save and Close	Click Save and Close when you have completed any changes to a Badge Layout and wish to save those changes.
Save and New	Click Save and New when you have completed any changes to the Badge Layout and wish to save those changes, and you want to create a new Badge Layout. The Badge Layout you were editing is saved, and a new Badge Layout opens.

Badge Layout Editor Definitions (continued)

Field/Button	Description
Create Copy	<p>Click Create Copy to create a new Badge Layout object that includes all of the elements of the Badge Layout and the associated Badge Design. For example, the copied object will have the same Height, Width, Orientation, Card Formats, Captions, etc. as the original Badge Layout.</p> <p>Fill in a unique Badge Layout Name and click Save and Close to save the new Badge Layout.</p>
	<p>Click Close when you want to close the editor without saving your changes.</p> <p>A prompt appears so that you can choose to continue editing or close the editor. Click OK to close the editor without saving changes, or click Cancel to continue editing the Badge Layout.</p>

CHUID Format

This chapter explain how to edit, enable, and validate CHUID Formats.

In this chapter

- CHUID Format Overview168
- CHUID Format Editor171
- Viewing a List of CHUID Formats177

CHUID Format Overview

C•CURE 9000 provides eleven Card Holder Unique Identifier (CHUID) format templates. You can create additional CHUID formats by modifying the existing format templates to meet your needs. (CardOnly CHUID format cannot be modified.)

Each of these format templates is provided to support a different card type and usage. For example, the Card-Facility-Issue CHUID is provided to support legacy ISC Controller access cards. Similarly, the Government-HMAC CHUID is intended for sites that need to include an HMAC (Hash Message Authentication Code) in the cardholder identifier.

Depending on the requirements your site has for access credentials, you can use one or more of these formats, and you can modify the formats you use – as long as those formats can be validated to guarantee that the resulting credentials are unique on the C•CURE 9000 system.

To use a CHUID format in your Personnel records, that CHUID format must be enabled. By default, only the CardOnly CHUID format is enabled.

Because C•CURE 9000 uses a Card Reader format to interpret the raw data read from an access card, you should create a Card Reader format for each CHUID format you enable. You can then assign the Card Reader format to all readers that you expect to read access cards that use a particular CHUID format. For more information on Card Reader formats, see the *C•CURE 9000 Card Formats and Smart Card Keys User Guide*.

To use a different format, you need to open the **CHUID Format Editor** and create a CHUID format from one of the templates.

NOTE

When you make changes to a CHUID format, the C•CURE 9000 Hardware Drivers should not be running; changes to the CHUIDs in Personnel records can force a download of card records to the hardware controllers, and this is not desirable during normal operations. See [Applying a CHUID Format to Existing Credentials](#) on [Page 174](#).

If you plan to modify a CHUID format, it is best to do so before credentials are added to Personnel records because Credentials significantly lengthen the conversion time (if more than 20,000 credentials exist in the system).

See [Table 28](#) on [Page 168](#) for more information on the CHUID Format templates.

Table 28: CHUID Formats

Format	Field (Length)	CHUID Length	Notes
Card Only	CardNumber (10)	10	The format itself is read-only. You can change the Name and Description fields of the Format but not data fields, length, or positions.
Card Only 64 Template	CardNumber (20)	20	Card Only 64-bit Unique Identifier template.
Card-Facility-Issue Template	CardNumber (10) FacilityCode (4) IssueCode (4)	18	This CHUID format is intended to support ISC Controllers.

CHUID Formats (continued)

Format	Field (Length)	CHUID Length	Notes
Government Card Template	Card Number (6) Agency Code (4) System Code (4) Credential Series (1) Credential Issue (1)	16	
Card Only 64 Template	CardNumber (20)	20	Card Only 32-bit Unique Identifier template.
Card-Facility Template	CardNumber (10) FacilityCode (4)	14	This CHUID Format is read-only.
PIN-Only Template	CardNumber (10)	10	The format itself is read-only. You can change the Name and Description fields of the Format but not data fields, length, or positions.
Government-HMAC Template	CardNumber(6) AgencyCode(4) SystemCode (4) CredentialSeries (1) CredentialIssue (1) HMAC (10)	26	Intended for sites that need to include an HMAC (Hash Message Authentication Code) in the cardholder identifier.
Extended Format	Any Fields	Between 10 and 80.	This format is the basis of user-created CHUID formats and the templates other than CardOnly, Pin Only, and Card Only 64.

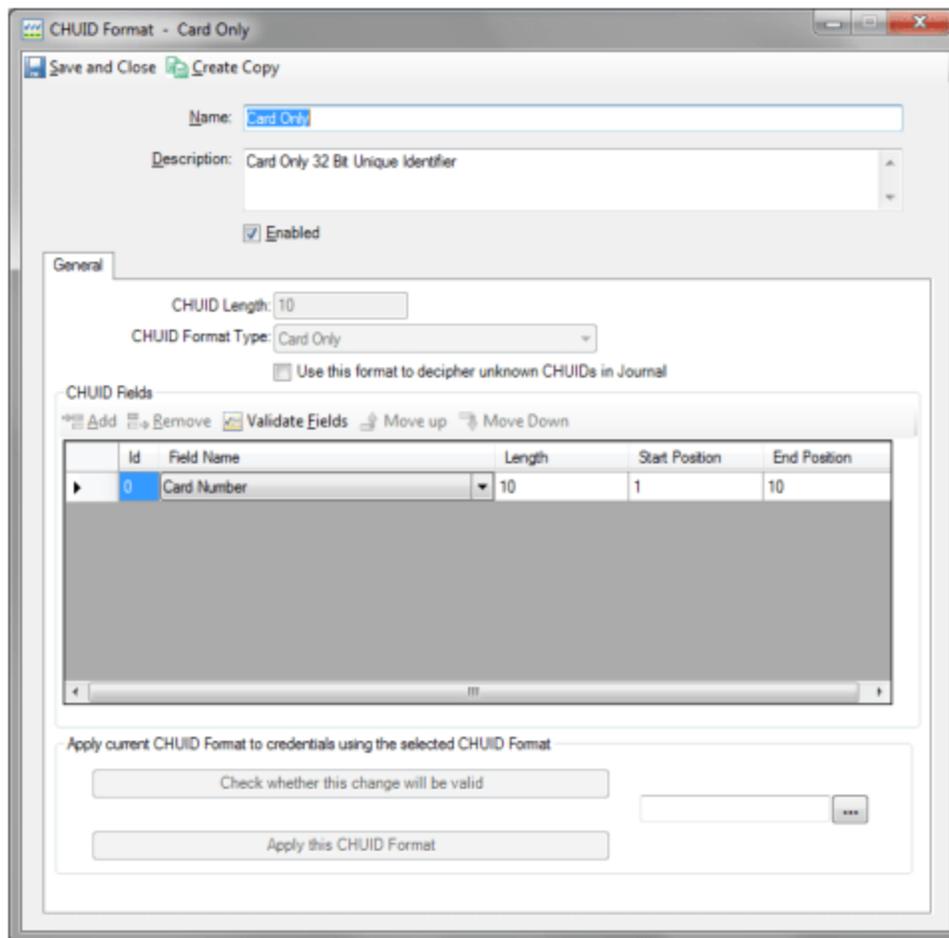
CHUID Formats (continued)

Format	Field (Length)	CHUID Length	Notes
Full FASC-N CHUID Format (200 bit) Template	CardNumber(6) AgencyCode(4) SystemCode (4) CredentialSeries (1) CredentialIssue (1) Personnel Identifier (10) Association Category (1) Organizational Category (1) Organizational Identifier (4)	32	This Smartcard format is used by 200 bit TWIC/PIV II (Transportation Worker Identification Credential/Personal Identity Verification) cards.
PIV II CHUID Format (75 bit) Template	Card Number (6) Agency Code (4) System Code (4)	14	This Smartcard format is used to represent the GSA CHUID Format used by PIV II (Personal Identity Verification) cards.
PIV-I CHUID Format (128-bit) Template	Card Number (40) CardInt1 (20) CardInt2 (20)	80	This Smartcard format is used to represent the GSA CHUID Format used by PIV-I (Personnel Identity Verification) cards.
SmartID 128 Template	CardInt2 (15) CardInt3 (15) CardInt4 (10)	40	<p>The Smart ID Credential field is a single 128-bit field. The Smart ID value is divided by the system into the CardInt2, CardInt3, and CardInt4 fields, which make up the Smart ID 128 CHUID format.. This CHUID format is used to meet the requirements of FIPS 201.</p> <p>CardInt2 is the Most Significant Bit (MSB), while CardInt2 is the Least Significant Bit (LSB).</p> <ul style="list-style-type: none"> • CardInt2 is 48 bits (15 MSB digits) • CardInt3 is 48 bits (15 digits) • CardInt4 is 32 bits (10 LSB digits) <p>This format can only be used if the Smart ID Mode System Variable is set to 1. See the System Variables chapter in the <i>C•CURE 9000 System Maintenance Guide</i>.</p>

CHUID Format Editor

The **CHUID Format Editor** allows you to edit and enable any or all of the CHUID formats that are included with C•CURE 9000, and to customize these formats to meet your site's needs. The **CHUID Format Editor** is shown in [Figure 45](#) on [Page 171](#).

Figure 45: CHUID Format Editor



- See the [CHUID Format Overview](#) on [Page 168](#) for more information about CHUID formats in C•CURE 9000.
- See [CHUID Format Editor Definitions](#) on [Page 177](#) for definitions of the CHUID Editor Fields and Buttons.
- See [CHUID Format Fields](#) on [Page 179](#) for the list of fields that can be included in a CHUID Format.
- See [CHUID Format Tasks](#) on [Page 171](#) for the tasks you can perform using the CHUID Format editor.

CHUID Format Tasks

You can perform the following tasks with the CHUID Format Editor.

- [Creating and Enabling a CHUID Format](#) on [Page 172](#)
- [Editing a CHUID Format](#) on [Page 173](#)
- [Checking a CHUID Format](#) on [Page 174](#)

- [Applying a CHUID Format to Existing Credentials](#) on [Page 174](#)

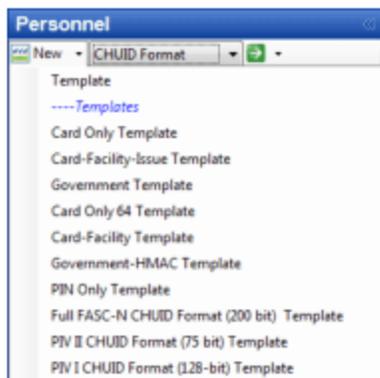
Creating and Enabling a CHUID Format

- A CHUID Format should be created from a template (to avoid creating an invalid format) and enabled to be used in Personnel records.
- The CardOnly CHUID format is enabled by default.
- You can create additional CHUID formats from scratch (not recommended) or from the templates and enable them if you need them.

To Create a CHUID Format from a Template

1. In the **Navigation** Pane of the Administration Workstation, click **Personnel** to open the Personnel pane.
2. Select **CHUID Formats** from the Personnel pane drop-down list.
3. Click **New** to create a new CHUID Format from scratch, or click the drop-down arrow on the **New** button to choose a Template to base your CHUID Format on.

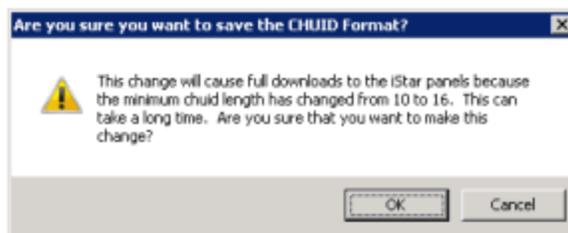
NOTE **New from Template** is the preferred method for creating a CHUID format, to minimize potential errors.



4. Type in a Name and Description for this CHUID Format.
5. Click **Enabled** to Enable the CHUID Format.
6. Select **Use this format to decipher unknown CHUIDs in Journal** if you want C•CURE 9000 to interpret card swipes by unknown cards using this CHUID format, so that the resulting Journal entry is more useful. See [Personnel Credentials Tab Definitions](#) on [Page 55](#) for more information.
7. Click **Add** to add fields to the CHUID Format.
8. To remove a field from the CHUID Fields table, click the row selector to select one or more CHUID format field rows (hold down **SHIFT** or **Ctrl** to select multiple rows), then click **Remove** to delete the row for this field. This button is unavailable when no rows exist, or no rows are selected.
9. To change fields that are currently in the CHUID Format, click the drop-down arrow in the **Field Name** column and select a new field from the list.
10. Set the Field Length (this will adjust the Start Position and End Position for the field).
11. Repeat steps 6 through 9 as needed for additional fields.

12. When you have completed all modifications and additions, click **Validate Fields** to validate the CHUID format fields before saving your changes to the format.
13. Click **Save and Close**. If the CHUID Format is longer than all existing ones, a dialog box appears to warn you about the effects of changing a CHUID format.

Figure 46: Save Warning for CHUID Format



14. Click **OK** to confirm enabling the CHUID Format, or **Cancel** to cancel the process.

Editing a CHUID Format

After you save a CHUID format, subsequently you can only modify the **Name**, **Description**, and **Enabled** flag if you edit the format.

Instead you can use the **Create a Copy** button to create a new CHUID format using the same settings as an existing CHUID format. You can edit this copy to make any changes, and then if desired, apply the new CHUID format to all records that currently use an existing CHUID format.

Modifying a CHUID Format by Creating a Copy

NOTE

You cannot modify the fields and format length of a CHUID Format after you have saved it. If you need to modify a CHUID Format after saving it, you need to create a copy of the Format, using **Create a Copy**, modify the copy, and then apply the new CHUID Format in place of the existing one.

To Modify a CHUID Format

1. In the **Navigation** Pane of the Administration Workstation, click **Personnel** to open the Personnel pane.
2. Select **CHUID Formats** from the Personnel pane drop-down list.
3. Click  to open a Dynamic View listing all CHUID Format objects.
4. Select the CHUID format that you want to modify from the list.
5. Double-click the CHUID format to edit it (or right-click and choose **Edit** from the context menu). The **CHUID Format Editor** opens.
6. Click **Create Copy** to make a copy of the existing CHUID format.
7. You can name the CHUID Format by typing in the **Name** field.
8. You can modify the Description of the CHUID Format by typing in the **Description** field.

9. You can select the **Enabled** flag to make the CHUID Format available for assignment to Personnel records. Or you can clear the field if you do not want the CHUID Format Enabled. (If a CHUID Format is currently assigned to one or more Personal records, you cannot clear this field.)
10. You can click **Add** to add a field to the CHUID format. A new row appears in the CHUID Fields table.
11. Select a field for the row from the **Field Name** drop-down list.
12. Type in the field length of the field into the **Length** column.
13. To remove a field from the CHUID Fields table, click the row selector  to select one or more CHUID format field rows (hold down **SHIFT** or **Ctrl** to select multiple rows), then click **Remove** to delete the row for this field. This button is unavailable when no rows exist, or no rows are selected.
14. You can change the position of a field in the CHUID Format by using the **Move Up** button to move the field's row up in the table, or use the **Move Down** button to move the field's row down in the table.
15. You can change the Length of an existing field by typing the length into the **Length** field.
16. Click **Save and Close** to save your changes. If the CHUID Format is longer than all existing ones, a dialog box appears to warn you about the effects of changing a CHUID format. See [Figure 46](#) on [Page 173](#).
17. Click **OK** to confirm enabling the CHUID Format, or **Cancel** to cancel the process

Applying a CHUID Format to Existing Credentials

You can replace an existing CHUID Format for all existing Credentials assigned that CHUID Format. You use the **Apply this CHUID Format** button to replace the existing CHUID Format in all Credentials using that CHUID Format.

You can use the **Check whether this change will be valid** button to learn if any Credentials will fail to be changed to the new CHUID Format, prior to attempting to apply the new Format. You can then examine these Credentials to determine if you can modify them to work with the new CHUID Format. If a Credential during the **Apply this CHUID Format** process, the Credential retains its current CHUID.

You can perform the following CHUID Format tasks:

- [Checking a CHUID Format on Page 174](#)
- [Applying a CHUID Format on Page 175](#)

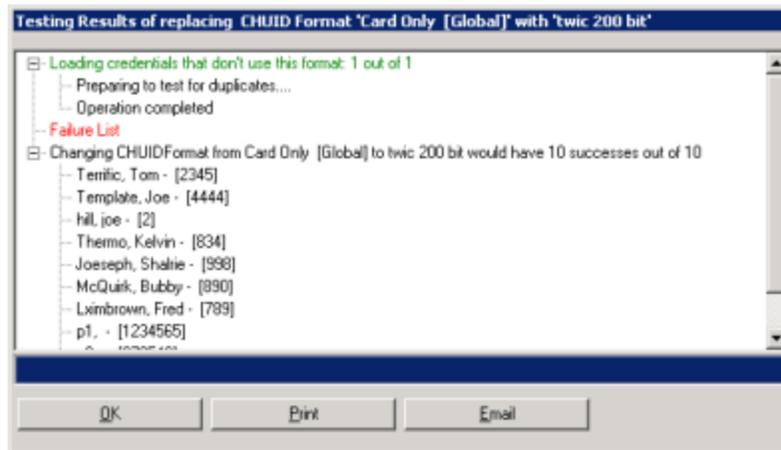
Checking a CHUID Format

To Check a CHUID Format

1. In the CHUID Format editor, open the CHUID Format you want to use to replace an existing format.
2. Click  and select the CHUID Format you want to replace. The **Check whether this change will be valid** button becomes enabled.
3. Click **Check whether this change will be valid**.

The system performs a test and displays a Testing dialog box ([Figure 47](#) on [Page 175](#)) that shows if any Credentials would fail to be applied.

Figure 47: CHUID Testing Progress Dialog Box

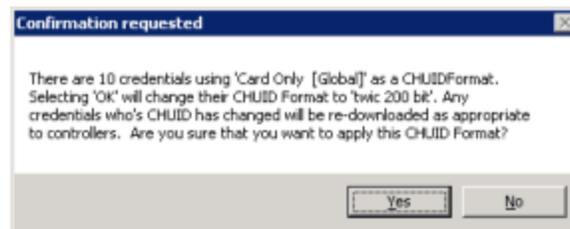


4. If you are satisfied with the result, you can apply the CHUID Format using the **Apply this CHUID Format** button. See [Applying a CHUID Format](#) on Page 175.
5. You can save the CHUID Format by clicking **Save and Close**.

Applying a CHUID Format

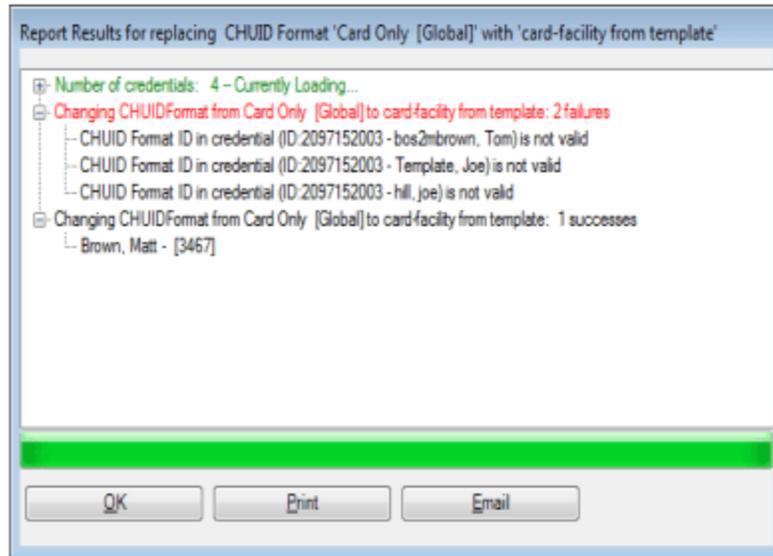
If you want to apply a CHUID Format to existing Credentials that currently use a different CHUID Format, you can edit the CHUID Format you want to apply and use the **Apply this CHUID Format** button to apply the format, replacing the selected format in any Credentials that use that format.

6. Open the CHUID Format you want to apply in the CHUID Format editor.
7. Click  to choose the CHUID Format you want to replace. a selection dialog box appears listing the CHUID Formats you can replace.
8. Click **Apply this CHUID Format**.
9. A confirmation dialog box appears asking you if you are sure you want to apply the CHUID format.



If you are changing the CHUID on a database with a large number of credentials, it can take a long time to update all CHUIDs, especially if the new CHUID format length causes all CHUIDs in the system to change.

A CHUID Progress dialog box appears ([Figure 48](#) on Page 176) to allow you to keep track of the changes.

Figure 48: CHUID Validation Progress Dialog Box

10. Click **OK** to close the dialog box.

Viewing a List of CHUID Formats

You can view a list of all CHUID Formats by opening the default Dynamic View for CHUID Formats.

To View a List of CHUID Formats

1. In the **Navigation** Pane of the Administration Workstation, click **Personnel** to open the Personnel pane.
2. Select **CHUID Formats** from the Personnel pane drop-down list.
3. Click  to open a Dynamic View listing all CHUID Format objects.
4. You can sort, filter, and group items in the list.
5. You can right-click a CHUID Format in the list to open the context menu and perform any of the functions on that menu. See "Using the Object List Context Menu" in the *C•CURE 9000 Getting Started Guide* for more information.
6. If you want to view a list of CHUID Format Templates, select the **Template** check box in the Search pane, then click .

CHUID Definitions

This section defines the fields and buttons on the **CHUID Format Editor** General tab.

CHUID Format Editor Definitions

Table 29 on Page 177 describes the fields on the CHUID Format Editor.

Table 29: CHUID Format Editor Definitions

Field	Description
Name	The name of the CHUID format. The Maximum length can be 100 characters.
Description	Textual description of the CHUID. The maximum length for the Description is 500 characters.
Partition	A read-only field displaying the partition to which this CHUID Format belongs. This field is visible only if the C•CURE 9000 system is partitioned.
Enabled	This flag is used to indicate whether the CHUID Format can be selected for any card records. If Enabled is not selected, you cannot assign the format to a Personnel record. If a CHUID Format is currently enabled, and the format is currently assigned to one or more Personnel records, you will receive an error message if you try to clear the Enabled field and save changes to the CHUID. You cannot clear the Enabled field until you remove the CHUID from any Personnel records to which it is assigned. You can view a list of Credentials to determine what CHUID formats are assigned to each Credential.
CHUID Length	A read-only field that specifies the number of characters in the CHUID Format. This value is calculated from the lengths of the individual fields in the CHUID Format.

CHUID Format Editor Definitions (continued)

Field	Description
CHUID Format Type	A read-only field that identifies the the type of CHUID Format that this CHUID Format is based upon. Possible Values are: Card Only - based on the 10-character Card Number. Card Only 64 bits - based on a 20-character Card Number. PIN Only - based on a 10-character PIN. Extended Format - an extensible CHUID Format that lets you add or remove fields.
Used by 128 bit SmartID	A Checkmark in this read-only field indicates that this card format was created from the 128 bit CHUID Format Template for Smart ID usage.
Use this format to decipher unknown CHUIDs in Journal	If you select <input checked="" type="checkbox"/> this option, C•CURE 9000 will try to interpret card swipes by unknown cards using this CHUID format, so that the resulting Journal entry is more useful. Example: If you swipe an unknown card at a reader, as message similar to this appears: "Rejected (Unknown card)(1001000278) access request at 'door 1 [Default]' (IN)" If you have selected this option for the Card-Issue CHUID Format, the card number is interpreted using that CHUID Format: "Rejected (Unknown card)(Card: 100100027 Issue: 8) access request at 'door 1 [Default]' (IN)"
CHUID Fields	The field selections are those of the Personnel Identifier and the standard extended card fields. You can specify any number of fields until the maximum number of digits is reached. The field order is fixed, and cannot be changed by Operator. A CHUID Format must have at least one field to be saved
Length	The length of the selected field.
Starting Position	The calculated starting position of the field in the CHUID format. This is a read-only field that is automatically calculated based on the previous field's length.
Ending Position	The calculated ending position of the field in the CHUID format. This is a read-only field that is automatically calculated based on the field's length.

CHUID Format Editor Buttons

Table 30 on Page 178 describes the buttons on the **CHUID Format Editor**.

Table 30: CHUID Format Editor Buttons

Button	Description
Save and Close	Click Save and Close when you have completed any changes to a CHUID Format and wish to save those changes.
Create Copy	Validates that: <ul style="list-style-type: none"> • There are no duplicated CHUID fields • All fields have valid, non-zero lengths • The length of the CHUID Format is not odd • The length of the CHUID is greater than 10 and less than 80.
Add	Click this button to add a new row to the table representing the CHUID fields in this CHUID Format

CHUID Format Editor Buttons (continued)

Button	Description
Remove	Click the row selector  to select one or more CHUID format field rows (hold down SHIFT or Ctrl to select multiple rows), then click this button to remove the row for this field. This button is unavailable when no rows exist, or no rows are selected.
Validate Fields	Validates that any change to the CHUID format fields does not cause any CHUID Format Violations. This button validates that the fields are the correct length; it does not validate the CHUID format against existing Personnel records.
Move up	Click this button to move the selected row up one position in the CHUID Fields table, changing the order of the fields in this CHUID Format. This can be useful if the order of fields on your access cards does not match the default order of fields in the CHUID Format.
Move down	Click this button to move the selected row down one position in the CHUID Fields table, changing the order of the fields in this CHUID Format. This can be useful if the order of fields on your access cards does not match the default order of fields in the CHUID Format.
Check whether this change will be valid	Click this button to check if all CHUIDs that would be changed have the correct length and fields. Displays a CHUID Validation Progress dialog box that reports any errors. To make this button available, you need to click  and select the CHUID format you wish to replace. Clicking this button will not replace the CHUID format, only test to see the results if the CHUID format were replaced.
Apply this CHUID Format	Click this button to replace an existing CHUID format with the CHUID format you are currently editing. All credentials that use the selected CHUID format will be changed. To make this button available, you need to click  and select the CHUID format you wish to replace.
	Click Close when you want to close the CHUID Format Editor without saving your changes. A prompt appears so that you can choose to continue editing or close the editor. Click OK to close the editor without saving changes, or click Cancel to continue editing the CHUID Format.

CHUID Format Fields

The following fields can be part of the CHUID Format. The fields are predetermined to be in the order listed below.

Example:

If Card Number is part of the CHUID, it will always be the first field in the CHUID.

- Card Number
- Facility Code
- Issue Code
- Agency Code
- System Code
- Credential Series
- Credential Issue
- HMAC
- CardInt1 – CardInt4

- Personnel Identifier (**Credentials** Tab)
- Association Category (**Credentials** Tab)
- Organizational Identifier (**Credentials** Tab)
- Organizational Category (**Credentials** Tab)

NOTE

Be aware that using Personnel Identifier, Association Category, Organizational Identifier, or Organizational Category in a CHUID format can significantly slow processing of bulk updates of Personnel such as Imports.

Personnel Views

The C•CURE 9000 Personnel Views Editor is used to create Personnel Views that allow you to customize the fields displayed in the Personnel Editor when an Operator edits a Personnel record.

In this chapter

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Personnel Views Layout Designer Tab	189
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Personnel Views Properties Panel	210
Personnel Views Properties Tab	214
Personnel Views Fields and Controls Tab	219

Personnel Views Editor

A C•CURE 9000 Personnel View is used to provide the Personnel editor with a customized 'view' - a set of tabs that display only the fields that a given Operator needs to edit Personnel records at your site.

With the Personnel Views editor, you can change the appearance of Personnel screens in C•CURE 9000, customizing the Personnel editor to show different fields and tabs. You can also add User-defined fields that you have configured to the Personnel Views (see the User-defined Fields chapter in the *C•CURE 9000 Software Configuration Guide* for more information about User-defined fields).

You can then edit a Personnel record using your new views to test them for appearance and function before making them available to C•CURE 9000 Operators (see [Assigning Personnel Views to Operators](#) on Page 186).

The following sections provide more information about the Personnel Views editor and tasks you can perform using it.

- [Personnel Views Editor Tabs](#) on Page 183.
- [Personnel Views Editor Tasks](#) on Page 184.
- [Layout Designer Tab Tasks](#) on Page 189.

Some of the changes that you can make with the Personnel Views editor are:

- Change the fields that are displayed on a Personnel editor view - see [Adding a Field to a Tab](#) on Page 194.
- Create new tabs for a Personnel editor view - see [Adding a Tab to a View](#) on Page 199.
- Change the size, location, and label of fields - see [Changing Field Properties](#) on Page 198.

NOTE

Changes to the labels of fields that are made using the Personnel View **do not** affect the label used for those fields on Dynamic Views, Reports, Exports, Imports, and Queries.

Changes to the labels of fields that are made using the language translation features of the Multi-language User Interface Editor **do** affect the label used for these fields by dynamic views, queries, reports, and exports. See the chapter in the *C•CURE 9000 System Maintenance Guide* on displaying C•CURE 9000 in multiple languages.

Changes to the labels on fields that are made using the Customer Field editor on the Customer tab and Extended Customer tab **do** affect the label used for these fields on Dynamic Views, Reports, Exports, Imports, and Queries. See [Understanding Personnel Views and the Customer Field Editor](#) on Page 183.

- Move fields from one tab to another - see [Moving a Field to Another Tab](#) on Page 195
- Remove a field from the View - see [Removing a Field](#) on Page 197
- Adjust the tab order of fields on a tab - see [Setting the Tabbing Order for a Personnel View](#) on Page 200.

Default Personnel Views

C•CURE 9000 provides two default Personnel views that cannot be modified or deleted, but can be saved as a copy (see [Creating a Copy of a Personnel View](#) on Page 185) for use as the basis of your customized Personnel Views:

- Default Personnel Edit View - this view is similar to the Personnel editor in previous versions.

- Personnel View with Header – this view shows the placement of Personnel Name-related fields so that they are not contained on a single tab, but are visible at all times. It contains fewer fields per tab (the Name header makes the size of each tab smaller).

NOTE

If you want to prevent Operators from accessing one or more of the Default Personnel Views, you can create an exception in the Operator Privilege. See [Assigning Personnel Views to Operators on Page 186](#)

Understanding Personnel Views and the Customer Field Editor

The Customer Field editor lets you rename, move, and hide fields on the Personnel Editor Customer tab and Extended Customer tab, in one or more languages. The changes you make on these tabs using the Customer Field editor, particularly to the names of the fields, affect how these fields are displayed in Dynamic Views, Reports, Exports, Imports, and Queries.

NOTE

Moving, and hiding fields using the Customer Field editor does not affect existing Personnel Views, but does affect Personnel Views created subsequently.

Renaming a label using the Customer Field Editor does affect existing Personnel View.

Example:

If you use the Customer Field editor to change the name of the **Text1** field to **Department Name**, subsequently when you display a Dynamic View of Personnel, one of the columns that you can choose to display is now **Department Name** rather than **Text1**. Similarly, if you create a Personnel Report, you can display the contents of the **Department Name** field on the Report.

However, if you did not change **Text1** to **Department Name** in the Customer Field editor, and instead used the Personnel Views editor to change the **Text1** field label on the Customer tab, the field appears as **Text1** in Dynamic Views, Reports, Exports, Imports, and Queries.

This is because you are only changing the field's label when you use the Personnel Views editor. You are not changing the meaning of the field outside of the Personnel View. You are just changing the way the field is labelled on one specific Personnel View - other Personnel Views can display the field differently.

Basic Guidelines

Customer Field editor - use to change the name of a field on the Customer tab or Customer Extended tab when you want to change the way the field is displayed by C•CURE 9000 in Personnel, Dynamic Views, Reports, Exports, Imports, and Queries.

Personnel Views editor - use when you want change the label of a Personnel field on any tab in a specific Personnel View. The change does not appear on Dynamic Views, Reports, Exports, Imports, Queries, or on any other Personnel View.

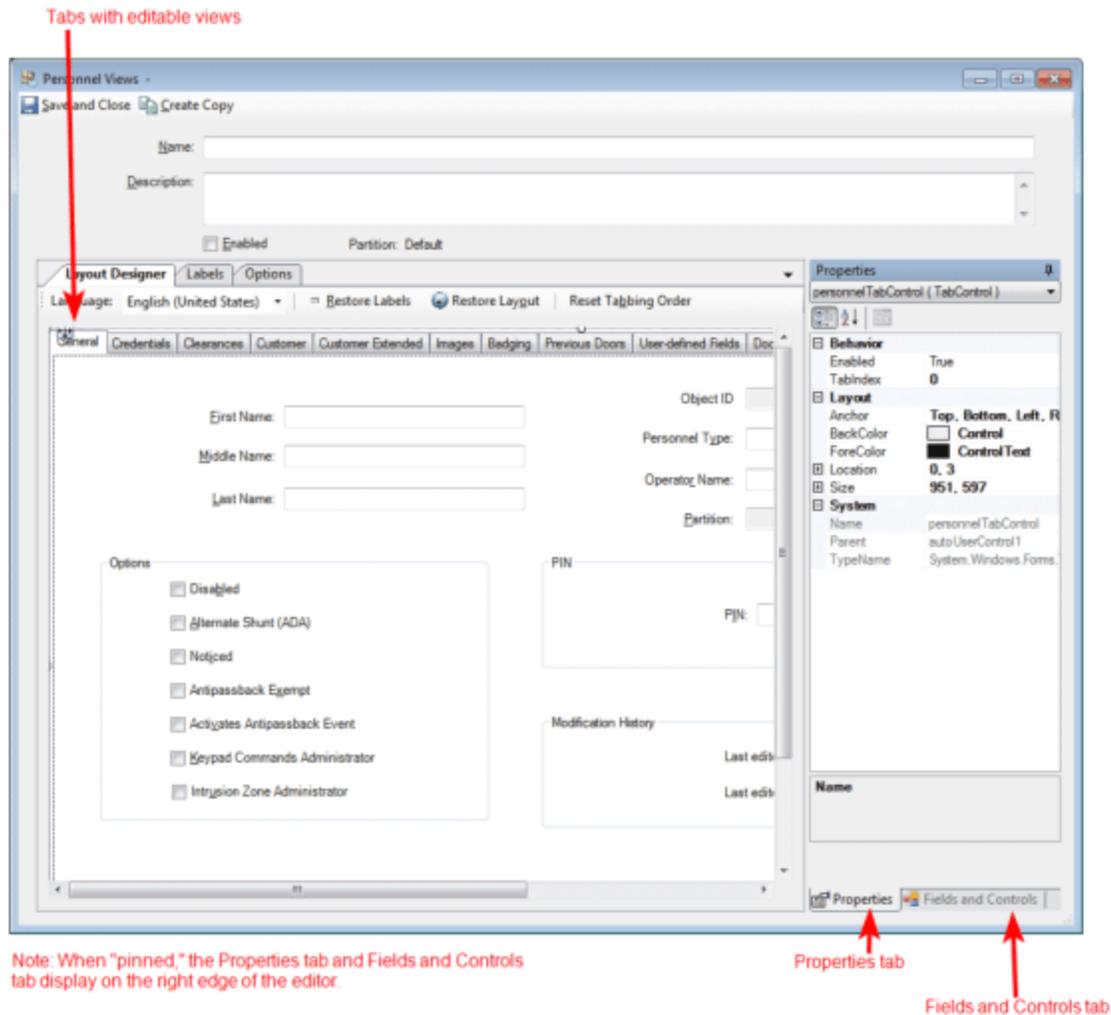
Personnel Views Editor Tabs

The Personnel Views Editor provides several tabbed views that you can use to configure the fields and tabs in your Personnel View. The editor also provides a View Properties form. The following sections give more information about each Personnel Views Editor tab and how to use it.

- [Personnel Views Layout Designer Tab on Page 189](#).

- [Personnel Views Labels Tab on Page 204.](#)
- [Personnel Views Options Tab on Page 208.](#)
- [Personnel Views Properties Panel on Page 210.](#)
- [Personnel Views Properties Tab on Page 214.](#)
- [Personnel Views Fields and Controls Tab on Page 219.](#)

Figure 49: Personnel Views Editor



Personnel Views Editor Tasks

You can perform the following tasks with the Personnel Views Editor to configure a Personnel View.

- [Personnel Object Tasks on Page 18.](#)
- [Accessing the Personnel Views Editor on Page 185.](#)
- [Creating a Copy of a Personnel View on Page 185.](#)
- [Using the Personnel Views List Context Menu on Page 186.](#)

- [Assigning Personnel Views to Operators](#) on [Page 186](#).

Accessing the Personnel Views Editor

You can access the Personnel Views Editor from the C•CURE 9000 Personnel pane.

To Access the Personnel Views Editor

1. Display a Dynamic View list of Personnel Views (see [Using the Personnel Views List Context Menu](#) on [Page 186](#)).
2. Double-click the name of the Personnel View in the list that you want to edit, and the Personnel Views Editor opens (see [Figure 50](#) on [Page 185](#)).

Figure 50: Personnel Views Editor

NOTE

Because the Personnel Views editor needs to load Personnel View data and the tools to edit this data, as well as any User-defined Fields included in the View, the Personnel Views Editor typically takes longer to load than the Personnel editor.

Creating a Copy of a Personnel View

You can create a copy of a Personnel View by using the **Create Copy** button in the Personnel Views Editor. When you create a copy of a Personnel View, everything in the view you copied is duplicated in the new View except the name of the view. When you save the new view you must give it a new object name that is unique.

NOTE

A copy of a view differs from a Personnel View Template in that the original and the copy can both be used to edit Personnel records and can be assigned to Operators. A Personnel View Template cannot be used to edit or modify Personnel records and it cannot be assigned to Operators – it is used strictly as a model for creating new views.

To Create a Copy of a Personnel View

1. Open the Personnel View you wish to copy. (See [Accessing the Personnel Views Editor on Page 185.](#))
2. Click **Create Copy**. A copy of the Personnel View you were editing is created and opened in the Personnel Views Editor.
3. Type a unique name for the new Personnel View in the **Name** field.
4. Make any editing changes you wish to the Personnel View.
5. Click **Save and Close** to save your new Personnel View.

Using the Personnel Views List Context Menu

The Personnel Views context menu that opens when you right-click on one or more Personnel Views in the list of Personnel Views includes selections that are common to all objects. See [Using the Object List Context Menu on Page 23](#) for more information on the common selections.

Assigning Personnel Views to Operators

When you create a new Personnel View and enable the view, Operators who have Privileges to access Personnel are given read-only access to the new view (provided the new view resides in a Partition that the Operator can access), and they can use the views to edit Personnel. If a view is not enabled, Operators cannot use it.

You can control how Operators can use Personnel Views to create or edit Personnel Records. See [Personnel Views Options Tab on Page 208.](#)

NOTE

If you create a Personnel View in the Default Partition, any Operator who has the Privilege **Access to Common Objects** has read-only access to the view unless you remove access by creating an exception.

Conversely, if you do not want an Operator to have any access to a Personnel View (either one you created or a Default Personnel View), you need to use the Privilege editor to prohibit that access by adding an exception.

To Assign a Personnel View to an Operator

1. Click **Configuration** in the Navigation pane.
2. Select **Privilege** from the Configuration pane drop-down list.
3. Click **New** to create a new Privilege (or edit an existing Privilege by clicking  , selecting the Privilege from the Dynamic View that appears, and double-clicking).
4. Click **Personnel Views** in the list of Classes. The Permissions list for Personnel Views appears in the Permissions box.

- Click in the **Grant** column for permissions you wish to give to Operators with this Privilege.

Example:

If you do not want Operators with this Privilege to be able to access any Personnel Views, click in the **No Access** row.

- If you want to set specific Permissions for individual Personnel Views:
 - Click on the Exceptions tab.
 - Click **Personnel Views** in the list of Classes.
 - Click **Add** to select one or more Personnel Views from a list, and click OK to add them to the Exception Objects table.
 - Click on the row for a Personnel View in the Exception Objects table.
 - Click in the **Grant** column for permissions you wish to give to Operators with this Privilege.
- When you are done setting Permissions, click **Save and Close** to save your settings and close the Privilege editor.
- If this Privilege is not already assigned to your Operator(s), select **Operator** from the Configuration pane drop-down list.
- Click  and select the Operator from the Dynamic View that appears, and double-click to edit the Operator.
- To add the Privilege to this Operator, click **Add** in the Privileges and Schedules table.
- Click in the new row in the Privilege column, then click to select the Privilege to add.
- Click on a Privilege in the Privilege dialog box that appears.
- Click in the new row in the Schedule column, then click to select the Schedule for the Privilege.
- Click **Save and Close** to save your settings and close the Operator editor.

To Remove Access to a Personnel View from an Operator

- Click **Configuration** in the Navigation pane.
- Select **Privilege** from the Configuration pane drop-down list.
- Click  to select the Privilege that you wish to edit from the Dynamic View that appears, and double-click it.
- Click the Exceptions tab.
- Click **Personnel Views** in the list of Classes.
- Click **Add** in the Exception Objects box.
- Click the Personnel View(s) that you want to prevent Operators with this Privilege from using. You can use multiple selection (**CTRL+Shift** for a range or **CTRL+Left-click** for individual Privileges) to pick more than one Personnel View.
- Click **OK** and these exceptions are added to the Exception Objects table.
- In the Permissions table, click in the **Grant** column to set the permission exceptions.
 - If you select **No Access**, the Operators with this Privilege are not able to access (or even see) the selected Personnel Views.

- If you select **Read**, they are only able to view these Personnel Views, but not edit the contents.

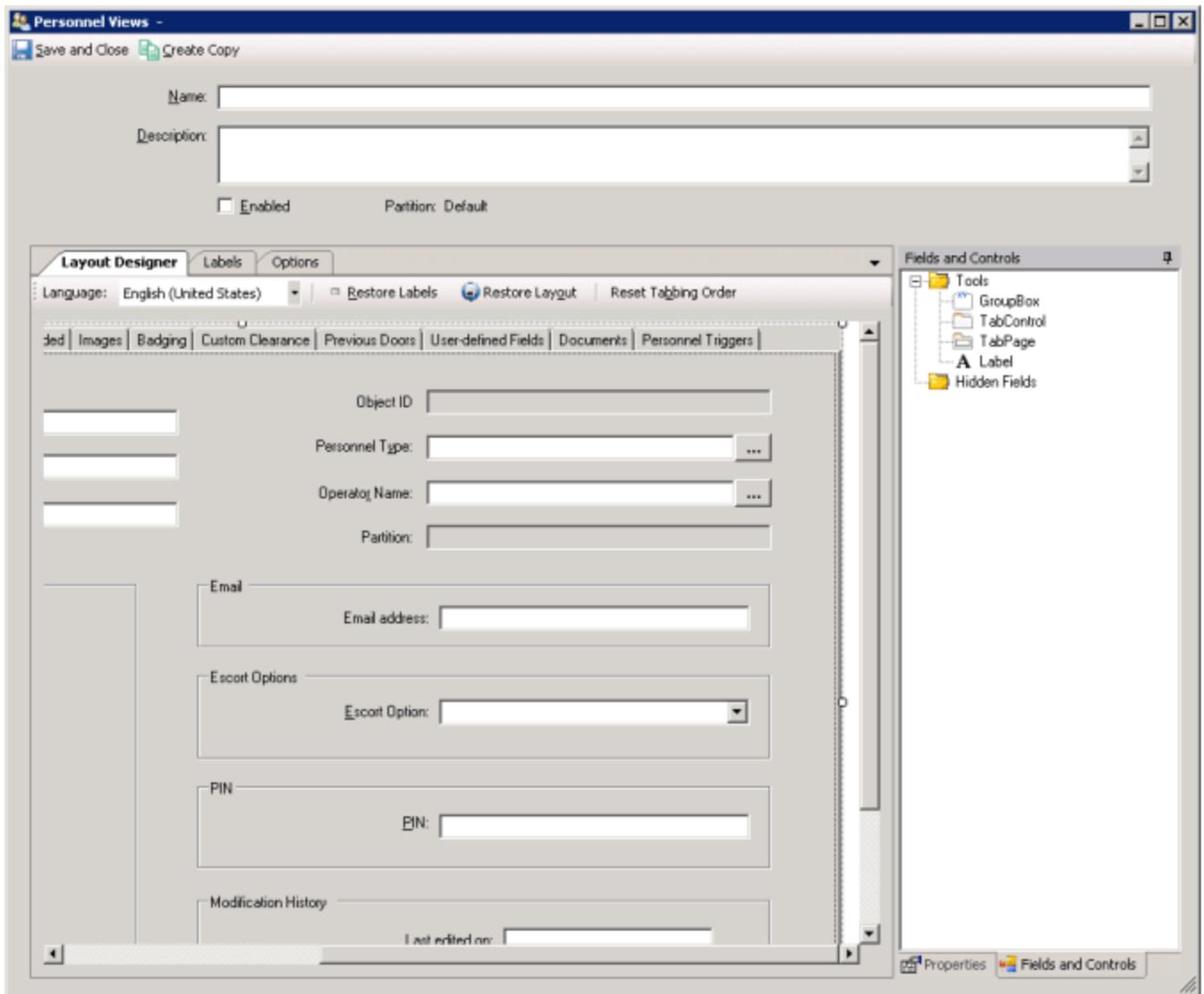
10. When you are done setting Exceptions, click **Save and Close** to save your settings and close the Privilege editor.

Personnel Views Layout Designer Tab

The **Personnel Views Layout Designer** tab lets you change the content and appearance of the Personnel editor in a particular Personnel View. You can move, remove and resize fields, add/remove tabs and boxes, and adjust the view to accommodate different languages in order to tailor the Personnel View to the needs of your Operators.

Figure 51 on Page 189 shows the Personnel Views Layout Designer tab.

Figure 51: Personnel Views Layout Designer Tab



- See [Layout Designer Tab Tasks](#) on [Page 189](#) for a list of the tasks you can perform from the Layout Designer tab.
- See [Personnel Views Layout Designer Tab Definitions](#) on [Page 202](#) for definitions of all fields and buttons on the Personnel View Layout Designer Tab.

Layout Designer Tab Tasks

See the following sections for instructions on performing Layout Designer tasks.

- [Displaying the Layout Designer in a Floating Window](#) on Page 190
- [Selecting a Language](#) on Page 191
- [Restoring Labels](#) on Page 192
- [Restoring a Layout](#) on Page 193
- [Selecting Objects in the Layout](#) on Page 193
- [Moving a Field to the Front or Back](#) on Page 195
- [Moving a Field to Another Tab](#) on Page 195
- [Moving a Field to a Different Group Box](#) on Page 196
- [Resizing a Field](#) on Page 196
- [Removing a Field](#) on Page 197
- [Aligning Fields](#) on Page 197
- [Changing a Field Label](#) on Page 198
- [Changing Field Properties](#) on Page 198
- [Adding a Tab to a View](#) on Page 199
- [Removing a Tab](#) on Page 200
- [Adding a Group Box](#) on Page 201

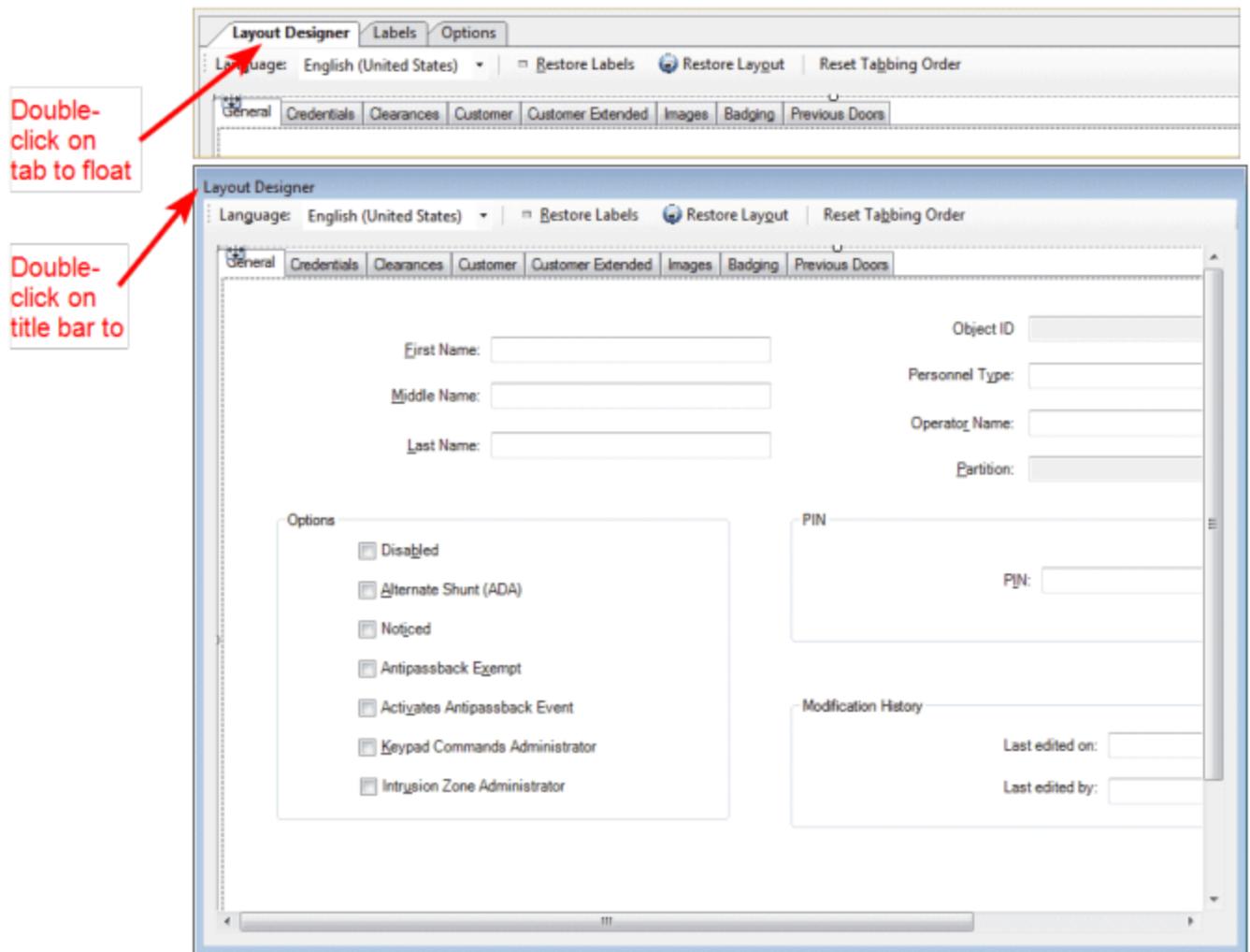
Displaying the Layout Designer in a Floating Window

You can display the Layout Designer in a floating window outside the C•CURE 9000 Content pane. Being able to move the Layout Designer to a screen location outside of the C•CURE 9000 Admin application can be useful if you want to see how an existing Personnel screen appears while you are designing a new view. Also, you can make the floating window larger or smaller so that you can see more of less of the layout design, as is convenient.

To Float or Dock the Layout Designer

- Double-click on the title bar of the Layout Designer to float the window. You can then move it anywhere on the desktop.
- Double-click on the title bar of a floating Layout Designer window to dock the window (return it to the Personnel Views Editor window).

Figure 52: Float Layout Designer to Move it on Desktop



Selecting a Language

When you are editing a Personnel View, you can make changes to the way the Personnel View appears in one or more languages.

NOTE When you use the Personnel Views Editor to make changes in any language, you are changing **only the label** of the fields in the Personnel View only, not the meaning of the field, or how it is used by C•CURE 9000 for other purposes such as Dynamic Views, Reports, or Queries.

Also, you can only make language changes for language versions currently residing on your system. When you choose a language from the Language field drop-down list, the list only contains the languages for which language resources already exist on your system.

There are two ways for language resources to be added to a C•CURE 9000 system.

- Install a C•CURE 9000 Language Pack. See the *C•CURE 9000 Installation and Upgrade Guide* for more information.
- Create a language translation using the Multilingual User Interface Editor, a purchaseable option. See the *C•CURE 9000 System Maintenance Guide* for more information.

Language resources created via the first two methods can be manually installed on a remote C•CURE 9000 client

To Select a Language

1. From the Personnel View Layout Design tab, click the down-arrow in the **Language** field. A list appears showing the available languages on your system.
2. Select a language from the **Language** drop-down list. The resources for that language are applied to the fields on your Personnel View.

Restoring Deleted Objects

If you delete an object (such as a field, label, GroupBox, or Tab) you can restore it by clicking **Ctrl+z**. You can restore multiple deletions by repeating the **Ctrl+z** key combination.

Example:

If you delete the **First Name** field, the Customer Tab, and the PIN Group Box, you can click **Ctrl+z** three times to restore the deleted objects.

Ctrl+z does not restore changes to object properties.

Example:

If you change the label for **Last Name** to "Surname" and the BackColor to 'Red', then click **Ctrl+z**, the previous property values are not restored.

Restoring Labels

You can restore all the labels in a Personnel View to the default values of the Default Personnel View using the **Restore Labels** button on the Layout Designer or on the Labels tab. Clicking this button restores all field labels to the value they have in the default Personnel View. This button does not restore fields that you have moved to a different tab or removed from the view.

You can restore an individual label by selecting the label and setting the UseDefaultLabel property on the Properties tab to **True**.

To Restore All Labels

1. Open the Personnel View for editing. See [Accessing the Personnel Views Editor on Page 185](#).
2. Click **Restore Labels** on the Layout Designer tab.
3. Click **Yes** to confirm your action. All labels are changed to the default values that are in the Default Personnel View.

Restoring a Layout

You can restore a Personnel View to the original default layout of the Default Personnel View (including tabs for User-defined fields). The **Restore Layout** button on the Personnel View Layout Designer can be used to discard any layout changes you have made, so that you can start again with the Default layout.

NOTE

If you created your Personnel View from a Personnel View Template and you click **Restore Layout**, the Layout is restored to the original default settings, not to the settings saved in the template. Additionally, any User-defined Fields that are accessible to the current Operator are added to the restored view.

To start again from the template, create a new Personnel View from the template.

To Restore a Layout

1. Open the Personnel View for editing. See [Accessing the Personnel Views Editor on Page 185](#).
2. Click **Restore Layout** on the Layout Designer tab.
3. Click **Yes** to confirm your action. All tabs in the View are changed to the default fields and positions that are in the Default Personnel View.

Selecting Objects in the Layout

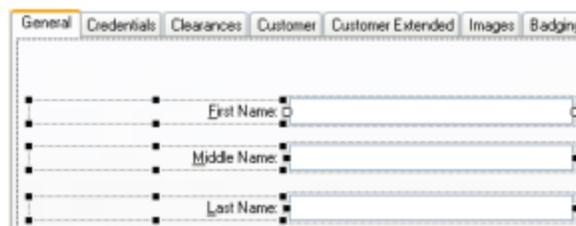
You can select one or more objects on the Layout Design tab using the mouse and keyboard, so that you can move these objects, change these object's properties, or change their front-to-back order relative to other objects on the layout design. See [Table 31 on Page 194](#) for a list of selection methods.

Example:

If you wish to change the background color of a field and its label, then move the field and label to a new position on the layout, you can select both the field and its label so that your changes apply to both.

When you select an object, the selection handles (black or white squares at the edges of the field or button) used to move and resize the object become visible. See [Figure 53 on Page 193](#).

Figure 53: Selection Handles



When you select multiple objects, the first object selected has white handles and is the 'active' object – if you choose to align the objects, they align with the object selected with white handles. If you select multiple objects, you can re-click one of the objects to make it the 'active' (white handle) object (see [Figure 54 on Page 194](#)).

Figure 54: Active Selection Handle

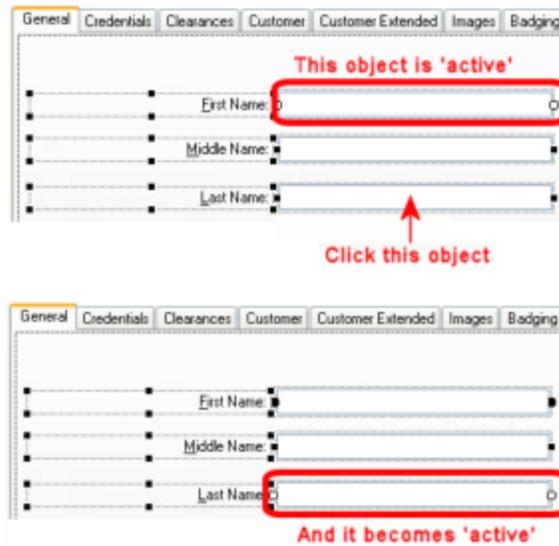


Table 31: Selecting Objects in the Layout Design Tab

To Select:	Do:
Field, Label, or Tab	Left-click on the object.
More than one object, such as a Field and its Label.	CTRL+Left-click on each object or SHIFT+Left-click on each object. The first object you select is 'active' (white handles).
Multiple Objects	Left-click on an empty spot in the layout and drag the mouse pointer to draw a selection box around multiple objects. When you release the left mouse button, all the objects within (even partially) the selection box are selected. The object nearest the top of the selection box is 'active' (white handles).

Adding a Field to a Tab

You can add a field to a tab by selecting the field in the Fields and Controls tab (see [Personnel Views Fields and Controls Tab](#) on [Page 219](#)) and dragging it to the a tab in the Personnel View.

The Fields and Controls tab includes two types of fields that you can add:

- Fields that were previously removed from the Personnel View.
- User-defined fields that were added to C•CURE 9000, but have not yet been added to this Personnel View.

Moving a Field or Label

You can change the location of a field or label on a view tab by selecting it with the mouse and dragging it to a new location.

NOTE

To move a field from one tab to another, you must remove the field from the tab it is located on, then add the field to the other tab. See [Moving a Field to Another Tab](#) on [Page 195](#) for more information.

NOTE

Fields and their labels must be selected together (see [Selecting Objects in the Layout](#) on [Page 193](#)) if you want to move them together. If you select and move the field alone, its label does not move.

To Move a Field or Label

1. Click on the field or label you want to move. (You can use multiple selection methods to select more than one field or label – see [Selecting Objects in the Layout](#) on [Page 193](#)).
The selection handles for the object become visible. See [Figure 53](#) on [Page 193](#) for an example.
2. Hover the mouse over the selected objects until the cursor changes to , then hold down the left mouse button and drag the objects to a new position.
3. Release the mouse button to complete the move.

Moving a Field to the Front or Back

You can move objects in the layout so that they are behind or in front of other objects using the **Bring to Front** and **Send to Back** selections on the Layout Design context menu.

If multiple objects overlap, you can repeat these functions to position the objects.

Example:

You have a Group Box, a field and text label, and a label with a colored background. You want the field and text label on top, the Group Box on the bottom, and the colored label in front of the Group Box but behind the field and label. If the colored label is in completely in front of the field and its label, you can select the colored label and click **Send to Back**. But now it is under the group box. You can select the Group Box and click **Send to Back** so that the group box is behind the colored label, and the colored label is behind the field and its label.

To Move a Field to the Front or Back

1. Click on the field, label, or object you want to move. (You can use multiple selection methods to select more than one field or label – see [Selecting Objects in the Layout](#) on [Page 193](#)).
2. Hover the mouse over the selected object(s), then right-click to open the context menu.
 - Click **Bring to Front** to move the object(s) on top of other objects that it overlaps.
 - Click **Send to Back** to move the object(s) behind other objects that it overlaps.

Moving a Field to Another Tab

To move a field (or other object) to a different tab, you need to remove it from its current tab and then add it to the other tab. When you remove a field, the field and its label are placed on the Fields and Control tab as a single entity. From there you can drag the field to another tab.

To Move a Field to Another Tab

1. Select the field you want to move.

2. Right-click and select **Delete**. The field – and its label – are removed from the tab and placed in the **Hidden Fields** folder in the Fields and Controls pane.
3. Click the tab on which you wish to place the field.
4. Click on the Fields and Controls tab of the Properties Form.
5. Locate the field you wish to place on the tab within the Hidden Fields folder, in a subfolder named for the tab where the field was originally.

Example:

If you deleted the field from the General tab to move it to the Badging tab, look in the **General** folder to find the field.

6. Select the field and drag it to a position on the tab. The field and its label are placed on the new tab.
7. You can then drag the field and label with the mouse to a precise location.

Moving a Field to a Different Group Box

You can move a field from one Group Box to another, or from anywhere into a Group Box.

To Move a Field to a Different Group Box

1. Select the field (and optionally its label) you want to move.
2. Click the left mouse button and drag the selected object(s) to the new position inside the Group Box.
3. Release the mouse button to drop the object(s).

Resizing a Field

You can resize a field or other object such as a label or Group Box using the mouse or by changing the size property in the Properties panel

Not all fields are resizable (for example, check box controls shrink and grow with the length of the text label).

NOTE

When you resize a field or label, you should consider the potential size for text if the Personnel View is translated into a language that typically needs larger field and label sizes, because the positions and sizes of the controls in a Personnel View are the same for any language the system is configured to use.

To Resize a Field Using the Mouse

1. Select the field that you want to resize by clicking it. Selection handles (see [Figure 53 on Page 193](#)) appear along the field's edges.
2. Click and hold the left mouse button on a selection handle and drag to make the field larger or smaller.

To Resize a Field Using the Properties Panel

1. Select the field that you want to resize by clicking it.
2. Display the Properties tab for the field (see [Personnel Views Properties Tab Definitions on Page 214](#)).

3. Click in the **Layout>Size** field.
4. Change the first number to change the field **Width**; change the second number to change the field **Height**.

Example:

The field size is currently 500,200. To change the **Height** to 300 change the field size to 500,300.

Removing a Field

You can remove a field from the Personnel View. A field that is removed from the Personnel View is listed in the Fields and Controls tab tree view until it is again placed on a tab in the Personnel View.

To Remove a Field

1. Select the field (or the label of the field) you want to remove.
2. Right-click and select **Delete**. The field and its label are removed from the tab (and placed in the Hidden Field folder on the Fields and Controls tab as a single entity).
3. You can open the Fields and Controls tree view to find the field and add it to another tab or group box by dragging and dropping it.

Aligning Fields

You can align selected fields in several ways:

Align Left – Aligns the left edge of the selected fields to the left edge of the ‘active’ field (white selection handles). Use this by selecting vertically positioned fields. If you try to use **Align Left** on fields that are horizontally aligned, the fields will overlap horizontally.

Align Right – Aligns the right edge of the selected fields to the right edge of the ‘active’ field (white selection handles). Use this by selecting vertically positioned fields. If you try to use **Align Right** on fields that are horizontally aligned, the fields will overlap horizontally.

Align Top – Aligns the top edge of the selected fields to the top edge of the ‘active’ field (white selection handles). Use this by selecting horizontally positioned fields. If you try to use **Align Top** on fields that are vertically aligned, the fields will overlap vertically.

Align Bottom – Aligns the bottom edge of the selected fields to the bottom edge of the ‘active’ field (white selection handles). Use this by selecting horizontally positioned fields. If you try to use **Align Bottom** on fields that are vertically aligned, the fields will overlap vertically.

To Align Fields

1. Select the fields (and/or labels) you want to align, using multiple selection (**CTRL+Left-click** on each field).
2. Click on the selected object to which you want to align the other objects. That object’s selection handles become ‘active’ (white).
3. Right-click and select an alignment option (**Align Left**, **Align Right**, **Align Top**, or **Align Bottom**) from the context menu.
4. The selected fields are aligned to the ‘active’ object according to the option you chose.

Changing a Field Label

You can change the label that identifies a field on the Personnel View. When you edit the label and change it, you are only changing the display label for the field in this view, not changing the meaning of the field in the C•CURE 9000 System. Nor are you changing the system label (the label that is used to identify the field in Dynamic Views, Reports, and Queries). To change the system label, you should use a translation tool like the Multilingual User Interface editor.

To Change a Field Label

1. Select the label associated with the field you want to change.
2. Display the Properties tab for that Label (see [Personnel Views Properties Tab Definitions](#) on Page 214).
3. In the **Translation>Label** property, type the new display label that you want to use.

Example:

If you want to change the display label for Text2 to “Identity” select the Text2 Label, then change the **Translation>Label** property to “Identity”.

4. If you want to assign a hot key to a letter or number in the Label, type an “&” in front of the character in the Label that you want to use as a Hot key. When a user holds down **Alt** and types this letter or number, the cursor tabs to this field.

NOTE

Hot keys are enabled on a per tab basis. If you assign “S” to a field label on the General tab, that hot key only works on the General tab and does not conflict with a hot key assignment of “S” on another tab.

If you assign the same letter or number to two or more fields on the same tab, the user will need to press the hot key several times to cycle between the fields to which the hot key is assigned. See [Creating Hot Keys on a Personnel View Tab](#) on Page 218 for more information.

Changing Field Properties

You can adjust the display properties of fields in your Personnel Views.

To Change Field Properties

1. Display the Properties tab (see [Personnel Views Properties Tab](#) on Page 214).
2. Select the field that you want to modify. That field’s properties appear in the Properties tab. (Alternatively you can select the control, right-click, then select Properties from the context menu to open the Properties form.)
3. You can now modify any of the editable property values for the field.

Example

- You can change the ReadOnly property of a TextBox field to **True** if you do not want the field's content's to be editable.
- You can change the BackColor property of a field to a different color.
- You can change the Label property of a field so that a different field name is displayed on the view.

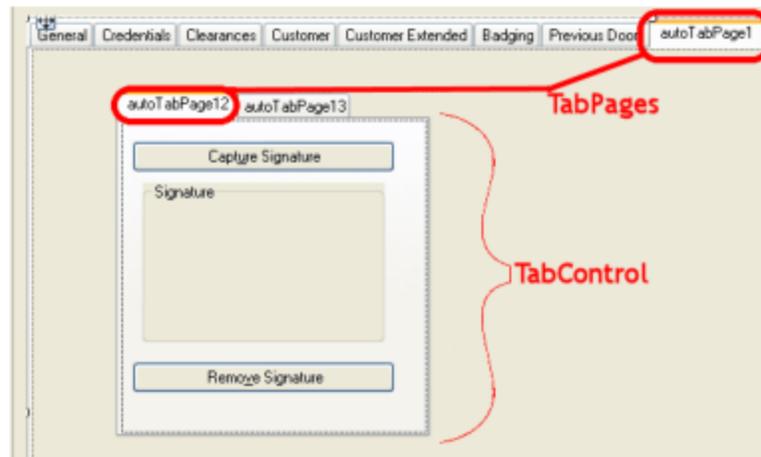
Adding a Tab to a View

You can add a new tab to a Personnel View. You can then add fields to the tab, or move fields from other tabs to the new tab (see [Moving a Field to Another Tab on Page 195](#)).

There are two kinds of tabs (see):

- A **TabPage** (like the General tab) can contain fields and **TabControls**. You can add a **TabPage** to the main page of the Personnel View - the `personnelTabControl` - to add a new tab at the same level as default tabs such as General, Badging, etc.).
- A **TabControl** can contain fields and **TabPages**. You can add a **TabControl** to an existing tab and then add **TabPages** to the **TabControl**. An example of a **TabControl** is the `tabControlCredentialInfo` object on the default Credentials tab - you can add more **TabPages** to this **TabControl**.

Figure 55: TabPage and TabControl



To Add a TabPage

1. From the Personnel Views Editor Fields and Controls tab, double-click on the Tools folder. (Alternatively you can select a tab, right-click, then select **Add Tab** from the context menu.)
2. Drag the **TabPage** from the Tools folder to the interior of an existing tab and release. The Tab control is added to that tab.

If you drag the **TabPage** to the main tab page (`personnelTabControl`) and release, the tab control is added at the same level as the default tabs (General, Credentials, etc.).

To Add a TabControl

1. From the Personnel Views Editor Fields and Controls tab, double-click on the Tools folder. (Alternatively you can select a tab, right-click, then select **Add Tab** from the context menu.)
2. Drag the **TabControl** from the Tools folder to the interior of an existing tab and release. The Tab control is added to that tab.
3. You can now add fields (or more **TabPages**) to the new **TabControl** (see [Adding a Field to a Tab on Page 194](#)).

Removing a Tab

You can remove a tab from a Personnel View if you do not want it to be used by your Operators. You can then add fields from that tab to other tabs if needed.

To Remove a Tab

1. From the Personnel Views Editor Layout Designer, click on the tab you want to remove.
2. Right-click and select **Remove Tab** from the context menu.
3. The tab is deleted and any fields on the tab are moved to the Tabs and Fields pane in the Hidden Fields folder. You can open this folder and drag fields from this folder to a position on the Layout Designer.

Setting the Tabbing Order for a Personnel View

Tab order governs the way the cursor moves when an Operator clicks the Tab key. The field, labels, and buttons in a Personnel View each have a TabIndex number assigned to them, and the numerical order of the TabIndex determines what object the cursor moves to when Tab is pressed. Typically, the default Tab Order moves the cursor from field to field from top left to bottom right within each Tab in the View (each Tab has its own tab order).

When you add, remove, or move objects in a View, it can affect the tab order because the new objects might be placed between objects that used to be adjacent. This can cause the cursor to seem to jump over fields when Tab is clicked.

You can adjust the tab order in two ways:

- You can manually change the tab order for a field by changing the TabIndex property on the Properties tab.
- You can click **Reset Tabbing Order** to set the tab order for all objects in the View. This button assigns every object on a tab in the Views editor a value that is 10 greater than the proceeding value. After performing a reset, every object can be tabbed in order from upper left to lower right on each tab. This can save you considerable time if you would like to re-establish the tabbing order after you have moved a number of fields to new positions.

To Reset the Tabbing Order for a View

1. From the Personnel View Layout Designer tab, click **Reset Tabbing Order**.
2. The tab order for each object on each tab in the View is recalculated.

To Set the TabIndex for an Object

1. From the Personnel View Layout Designer tab, click on the object for which you want to change tab order.
2. Click on the Properties tab.
3. In the **TabIndex** property, type the number for the new tab order and click **Enter**.

Adding a Group Box

You can add a GroupBox to a tab in a Personnel View. A GroupBox is used to visually group one or more fields on a tab. It can also provide additional information to the Operator about how the fields in the GroupBox are related, and how to use them. When you select a GroupBox in the Personnel Views Editor, moving or deleting the box moves or deletes all the fields within the GroupBox.

To Add a Group Box

1. Display the Fields and Controls tab (see [Personnel Views Properties Tab Definitions on Page 214](#)).
2. Display the tab to which you wish to add a Group Box.
3. Select the **GroupBox** control in the Fields and Controls Tools folder.
4. Drag the **GroupBox** to the tab.
5. Position the **GroupBox** on the tab using the  icon.
6. Resize the **GroupBox** as needed.
7. You can now add other fields, labels, or buttons to the Group Box.
8. If you add a Group Box on top of other fields, these fields do not become part of the Group Box unless you move the fields so that they are fully contained within the Group Box.

Deleting a Group Box

You can delete a Group Box from the View Layout.



When you delete a custom Group Box that has fields within it, the box and all of its contents are deleted from the View. In addition, the Title and properties of the Group Box are deleted - they are not preserved in the Fields and Controls tab.

If you accidentally delete a Group Box, you can:

- Click **Ctrl+z** to undo the deletion.
- Restore it using **Restore Layout** (if it was part of the original default view), but that discards any other layout or label changes you have made, even if you have saved previous changes.
- Click to close the editor, and answer **No** to the prompt "Save changes before editing?" Any changes you made during this editing session are discarded.

If you are going to delete a Group Box but do not want to delete the fields that reside in the Group Box, you should move those fields outside of the Group Box before deleting.

To Delete a Group Box

1. Display the tab on which the **GroupBox** you wish to delete resides.
2. Remove from the Group Box any fields, labels, or buttons you wish to preserve on the view and move them onto the Tab outside the Group Box.
3. Select the **GroupBox** and click **Delete**.

4. The **GroupBox** is deleted from the Tab.
5. Re-arrange the controls you moved from the Group Box.
6. You can click **Save and Close** to save your changes, or continue editing the view.

Personnel Views Layout Designer Tab Definitions

The fields and buttons on the Personnel Views Layout Designer tab are shown in [Table 32 on Page 202](#).

The selections available on the Layout Design tab context menu are defined in [Table 33 on Page 202](#).

Table 32: Personnel Views Layout Designer Tab Definitions

Field/Button	Description
Language	This drop-down list shows the languages for which C•CURE 9000 language resources have been installed on your system. See Selecting a Language on Page 191 .
Restore Labels	Changes the text of all the custom labels, group boxes, and tabs on the layout to be equal to the "Default Label" text. Changes to other properties (Color and Anchor for example) are not affected. When you click Restore Labels , a warning box appears asking you to confirm this change. For User-defined fields, this button sets the label to the name of the user-defined field.
Restore Layout	Restores all tabs in the layout to the Default Personnel Edit View, and places all User-defined fields that you can access onto the Personnel View. When you click Restore Layout, a warning message appears asking you to confirm that all customizations will revert to their default characteristics if you click this button.
Reset Tabbing Order	Sets the tab order for every object in the Views editor. When you move fields, labels, and boxes around the view without adjusting their TabIndex , they maintain the original tab order. Example: If you move the PIN field directly under the Last Name field, when a user clicks Tab repeatedly the PIN field will still be after the Partition field rather than the Last Name field. This button assigns every object in the Views editor a value that is 10 greater than the proceeding value so that every object can be tabbed in order from upper left to lower right on each tab. This can save you considerable time if you would like to re-establish the tabbing order after you have moved a number of fields to new positions. Additionally, you can make manual corrections to the tabbing order if needed.

Table 33: Layout Design Context Menu

Selection	Description
Bring to Front	Select one or more objects in the Design Layout, then click Bring to Front to move the selected objects to the top layer of the layout, in front of other objects.
Send to Back	Select one or more objects in the Design Layout, then click Send to Back to move the selected objects to the bottom layer of the layout, in back of other objects.
Align Left	Moves all selected objects so that their left edges are aligned to the object on which you opened the context menu.
Align Right	Moves all selected objects so that their right edges are aligned to the object on which you opened the context menu.
Align Top	Moves all selected objects so that their top edges are aligned to the object on which you opened the context menu.

Layout Design Context Menu (continued)

Selection	Description
Align Bottom	Moves all selected objects so that their bottom edges are aligned to the object on which you opened the context menu.
Delete	Removes the selected objects from the view and places them on the Fields and Controls tab, from which they can be placed back on the view on a different tab or location.
Properties	<p>Opens the Properties tab for the selected object. If you select multiple objects, even of different types, the Properties that they have in common are selected.</p> <p>Example:</p> <p>You could change the BackColor of a Label, a Field, and a GroupBox if you selected all three and chose Properties.</p>
Add Tab	Click to add a new tab to the View. (Available only when the personnelTabControl is selected). The new tab is added to the right of the User-defined Fields tab in the layout.
Remove Tab	Click to remove the selected tab from View. (Available only when the personnelTabControl is selected). The tab and all of its fields are removed from the Personnel View, so if you plan to remove a tab you should consider moving its fields to another tab first.

Personnel Views Labels Tab

The **Personnel Views Labels** tab lets you edit the labels for all fields in a Personnel View. In addition, you can make changes to the way the Personnel Views labels appear in one or more languages.

NOTE

When you use the Personnel Views Labels tab to make changes in any language, you are changing **only the labels** of the fields in the Personnel Views, not the meaning of the field, or how it is used by C•CURE 9000 for other purposes, such as Dynamic Views, Reports, or Queries.

Also, you can only make language changes for language versions currently residing on your system. When you choose a language from the Language field drop-down list, the list only contains the languages for which language resources already exist on your C•CURE 9000 system.

See [Personnel Views Labels Tab Definitions](#) on [Page 206](#) for definitions of all fields and buttons on the **Personnel Views Labels** tab. [Figure 56](#) on [Page 204](#) shows the **Personnel Views Labels** tab.

Figure 56: Personnel Views Labels Tab

Location	Name	Default Label	Label
General	tabPageGeneral	General	General
General	labelPartition	&Partition:	&Partition:
General	groupBoxPIN	PIN	PIN
General	labelPIN	P&IN:	P&IN:
General	groupBoxLastEdt	Modification History	Modification History
General	labelLastEdtBy	Last edited by:	Last edited by:
General	labelLastEdtDate	Last edited on:	Last edited on:
General	labelOperatorSelection	Operato&r Name:	Operato&r Name:
General	groupBoxOptions	Options	Options
General	checkBoxIntrusionZone	Intr&usion Zone Administrator	Intr&usion Zone Administrator
General	checkBoxIssueKeypadCmd	&Keypad Commands Administrator	&Keypad Commands Administrator
General	checkBoxAPEvent	Acti&vates Antipassback Event	Acti&vates Antipassback Event
General	checkBoxAPBExempt	Antipassback E&xempt	Antipassback E&xempt
General	checkBoxNoticed	Not&iced	Not&iced
General	checkBoxADA	&Alternate Shurt (ADA)	&Alternate Shurt (ADA)
General	checkBoxDisabled	Disa&bled	Disa&bled
General	labelPersonnelType	Personnel T&ype:	Personnel T&ype:
General	labelPersonnelID	Object ID	Object ID
General	labelLastName	&Last Name:	&Last Name:
General	labelMiddleName	&Middle Name:	&Middle Name:
General	labelFirstName	&First Name:	&First Name:
Credentials	tabPageCredentials	Credentials	Credentials
General	tabPageGeneralCredential	General	General

Labels Tab Tasks

The Labels tab provides you with an alternate way to view and edit the labels for fields in your Personnel Views. The Labels tab contains a list of all the labels from all the tabs in your Personnel View. When you select a label on the Labels tab, the label is also selected on the Layout Designer tab.

You can perform the following tasks from the Labels tab:

- [Displaying the Labels Tab in a Floating Window](#) on [Page 205](#)
- [Editing Labels in a Selected Language](#) on [Page 205](#)
- [Restoring Default Labels](#) on [Page 205](#)
- [Sorting Labels](#) on [Page 206](#)

- [Editing Labels Using the Labels Tab on Page 206](#)

Displaying the Labels Tab in a Floating Window

You can display the Labels Tab in a floating window outside the C•CURE 9000 Content pane. Being able to move the Labels Tab to a screen location outside of the C•CURE 9000 Admin application can be useful if you want to see how an existing Personnel screen appears while you are designing a new view. Also, you can make the floating window larger or smaller so that you can see more of less of the labels tab, as is convenient.

To Float or Dock the Labels Tab

- Double-click on the title bar of the Labels Tab to float the window. You can then move it anywhere on the desktop.
- Double-click on the title bar of a floating Labels Tab window to dock the window (return it to the Administration Client content pane).

Editing Labels in a Selected Language

You can select a language on the Labels tab so that you can edit labels for the View in that language. You can only choose languages for which language resources already exist on your system - you cannot create a new language version of the View from the Personnel Views editor. See [Selecting a Language on Page 191](#) for more information about language resources and the Personnel Views Editor.

A label has the same position on the View for all the languages. You can display labels in different languages to verify that labels do not overlap other controls in cases where the label text has a different length in other languages.

To Edit Labels in a Selected Language

1. In the Personnel Views Editor, click on the Labels tab.
2. Select a language from the Language field drop-down list.
3. Select the label that you want to translate.
4. In the **Label** column, type the label you want to display for the target language to replace the default language label.
5. To save the settings, click **Save and Close**.

Restoring Default Labels

You can make all of the Personnel View labels (in all Languages) revert to their default values.

To Restore All Labels to Their Default Values

1. In the Personnel Views Editor, click on the Labels tab.
2. Click **Restore Labels**. All Labels in all Languages are reset to their default values.
3. To save the settings, click **Save and Close**.

Sorting Labels

You can sort the labels on the Labels tab by the columns in the table by clicking on a column heading. Changing the sorting on the Labels tab does not change any label's placement in the Personnel View layout.

To Sort Labels by Label Name

1. From the **Labels** tab of the Personnel Views editor, click on the **Name** column in the table. The labels are sorted by Name from A to Z.
2. Click again on the **Name** column in the table. The labels are sorted by Name from Z to A.

To Sort Labels by Tab

1. From the **Labels** tab of the Personnel Views editor, click on the **Location** column in the table. The labels are sorted alphabetically by the View tab on which they occur.
2. Click again on the **Name** column in the table. The labels are sorted in reversed Alphabetic order by the View tab on which they occur.

Editing Labels Using the Labels Tab

You can edit the labels for fields on a view tab on the Layout Designer, but you can also use the Labels tab to edit field labels if you prefer. The Labels tab makes it easy to look at all of the Field labels that make up your view, and it can help you avoid unintentionally naming fields on different tabs with the same label - because you can sort the labels alphabetically and compare labels on different tabs (see [Sorting Labels](#) on [Page 206](#)).

To Edit Labels Using the Labels Tab

1. From the **Labels** tab of the Personnel Views editor, in the **Label** column, click in the Label you wish to edit.
2. Type in the value that you want for the label.
3. Click elsewhere to set the value. The Views Editor will validate the label you typed and display an error message if the label value is invalid.

Personnel Views Labels Tab Definitions

The fields and buttons on the Personnel Views Labels tab are shown in [Table 34](#) on [Page 206](#).

Table 34: Personnel Views Labels Tab Definitions

Field/Button	Description
Language	This drop-down list shows the languages for which C•CURE 9000 language resources have been installed on your system. See Selecting a Language on Page 191 .
Restore Labels	Restores all customized labels in this Personnel View to their default values.
Location	Identifies the tab in the Personnel View that the field or button resides on.

Personnel Views Labels Tab Definitions (continued)

Field/Button	Description
Name	The internal name of the field or button.
Default Label	The text that is displayed by default in a Personnel View to represent a database field or button. This text is read-only and can be modified by a translation tool such as the MultiLingual User Interface editor that can modify C•C9000 language resources.
Label	The customized text that is displayed in a Personnel View to represent a database field or button.

Personnel Views Options Tab

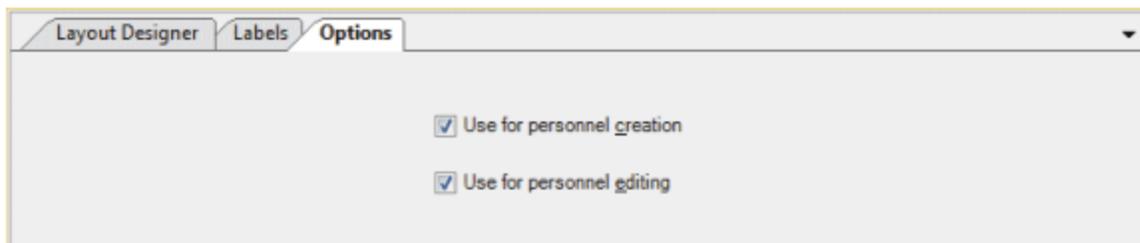
The **Personnel Views Options** Tab (shown in [Figure 57](#) on [Page 208](#)) lets specify how the View you are editing can be used by Operators:

- Use for personnel creation
- Use for personnel editing
- Use for both creating and editing.

NOTE

If you create a Personnel View that you do not want certain Operators to be able to access, you can change their Operator Privileges to include an Exception that gives them no access to that Personnel View. See the chapter on Privileges in the *C•CURE 9000 Software Configuration Guide*.

Figure 57: Personnel Views Options Tab



These settings allow you to specify different Views for adding new Personnel records and for editing existing Personnel records, and control how Operators can use these Views.

- If you select **Use for personnel creation** only, this View is only used when an Operator clicks **New** from the Personnel pane, or **Save and New** from within the Personnel Editor.
- If you select **Use for personnel editing** only, this View is only used when an Operator selects an existing Personnel record to edit, and the **Save and View** button is unavailable (because you cannot use this View to create a new Personnel record).
- If you select both options, this View can be used for both adding new Personnel and editing existing Personnel.
- If you select neither option, or you set the **Enabled** field to , this View is not enabled, and the View cannot be used by any Operator. (If there are no other Personnel Views enabled, the Operators will use the default Personnel View for both creation and editing.)

Example:

You create a Personnel View called "NewPersonnel" that contains the basic fields that you want an Operator to be able to edit when the record is created. However, for subsequent editing of the Personnel record, you intend to use a different Personnel View called "EditPersonnel", with additional, optional fields that do not appear on the 'creation' Personnel View.

For the "New_Personnel" View, you would select **Use for personnel creation** and clear **Use for personnel editing**.

For the "Edit Personnel" View, you would select **Use for personnel editing** and clear **Use for personnel creation**.

Personnel Views Options Tab Definitions

The fields and buttons on the Personnel Views Options tab are shown in [Table 35](#) on [Page 209](#).

Table 35: Personnel Views OptionsTab Definitions

Field/Button	Description
Use for personnel creation	Select this check box to enable the Personnel View to be used when creating a new Personnel record.
Use for personnel editing	Select this check box to enable the Personnel View to be used when editing an existing Personnel record.

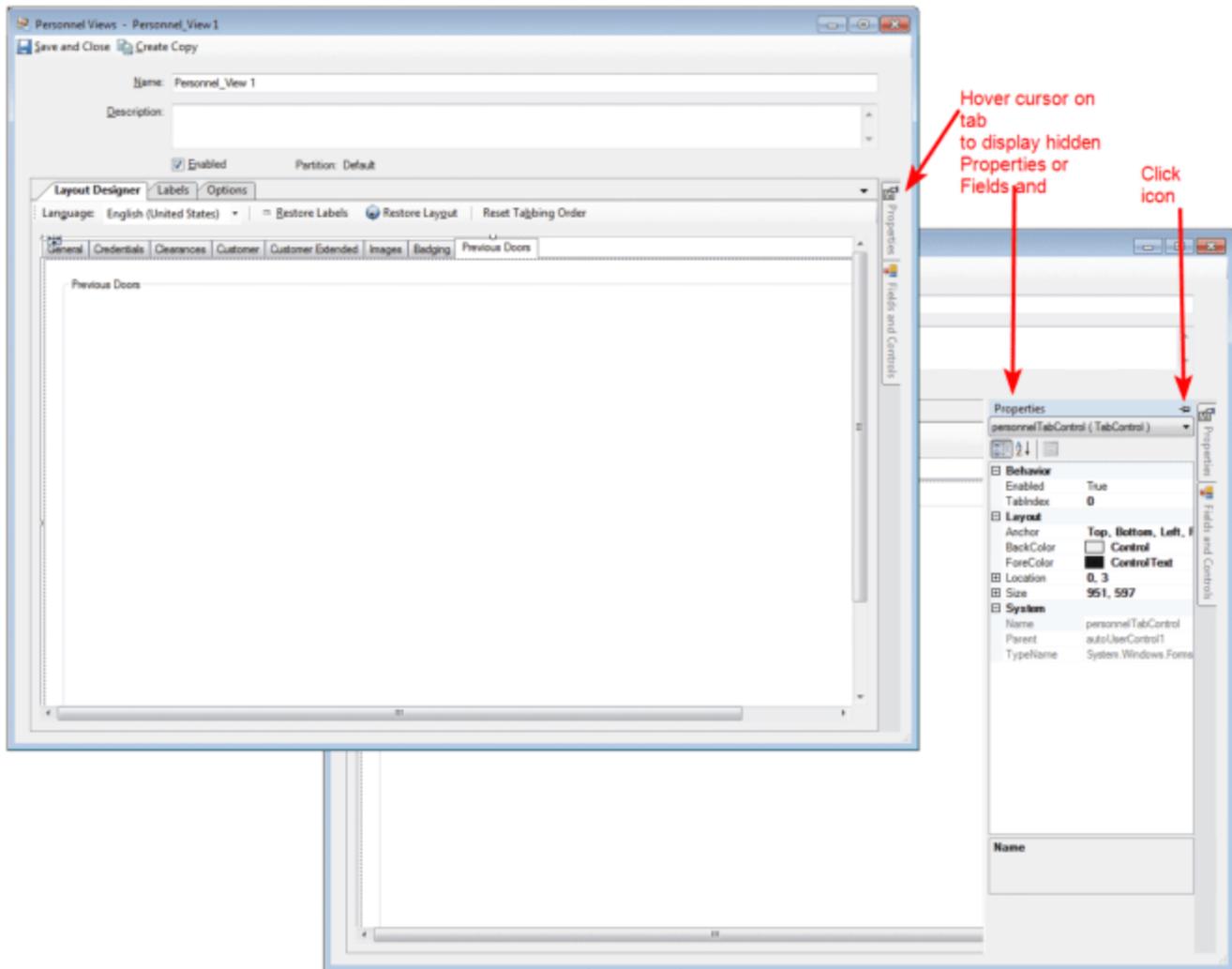
Personnel Views Properties Panel

The Personnel Views Properties panel has two tabs:

- [Personnel Views Properties Tab](#) on [Page 214](#) - allows you to specify the settings for a field, label, tab, or group box on the Layout Designer tab.
- [Personnel Views Fields and Controls Tab](#) on [Page 219](#) - allows you to add fields, labels, tab controls, tab pages, or group boxes to the Layout Designer.

[Figure 58](#) on [Page 210](#) shows the panel hidden and displayed.

Figure 58: Personnel Views Properties Tab



See [Personnel Views Properties Tab Definitions](#) on [Page 214](#) for definitions of the fields and buttons on the Personnel Views Properties tab.

See [Personnel Views Fields and Controls Tab Definitions](#) on [Page 220](#) for definitions of the fields and buttons on the Personnel Views Fields and Controls tab.

The panel is anchored to the frame of the Personnel Views Editor window, and the tabs of the panel can be displayed or hidden individually. You can pin the panel open, auto-hide the panel when not in use, or use it as an independent floating window.

- [Pinning the Properties Panel on Page 211.](#)
- [Auto-Hiding the Properties Panel on Page 211.](#)
- [Floating the Properties Pane on Page 212](#)

Pinning the Properties Panel

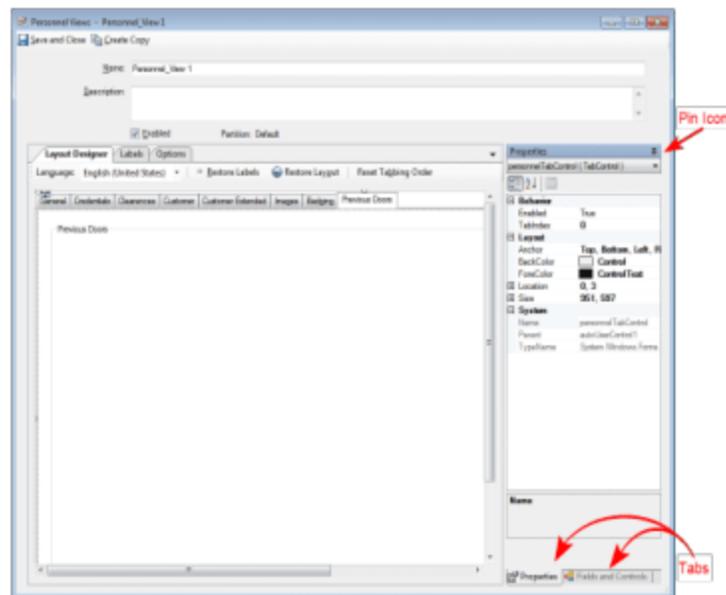
By default, the Properties Panel is anchored to the frame of the Personnel Views Editor window. If you hover over one of the tab anchors (indicated in [Figure 58 on Page 210](#), that tab opens. When you move the cursor away, the tab closes again (this is called auto-hide).

You can cause the panel to be always displayed by pinning open the panel (see [Figure 59 on Page 211](#)).

To Pin Open the Properties Panel

1. Hover over the Properties tab or the Fields and Controls tab anchor (circled in [Figure 58 on Page 210](#)). The Properties panel is displayed.
2. Click  on the title bar of the Properties panel. The button changes to  and the panel stays open (see [Figure 59 on Page 211](#)). You can alternate between the Properties tab and the Fields and Controls tab by clicking on either tab's anchor (circled in [Figure 59 on Page 211](#)).

Figure 59: Properties Panel Pinned Open



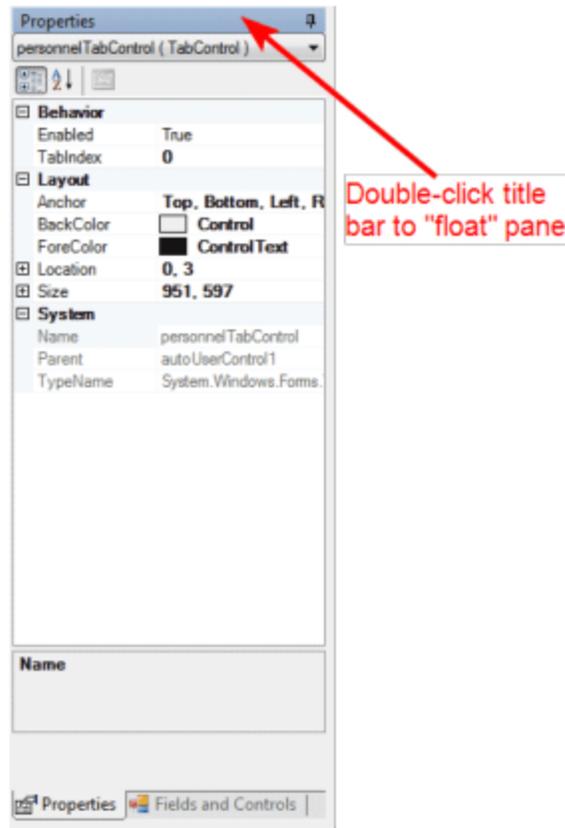
Auto-Hiding the Properties Panel

If you have pinned open the Properties Panel, you can unpin it and revert to the default auto-hide behavior.

To Auto-Hide the Properties Panel

1. Click  on the title bar of the Properties panel. The button changes to  and the panel closes (see [Figure 60](#) on [Page 212](#)).
2. You can now hover over the tab anchors (circled in [Figure 60](#) on [Page 212](#)) to alternate opening and closing the Properties tab and the Fields and Controls tab.

Figure 60: Properties Panel Unpinned



Floating the Properties Pane

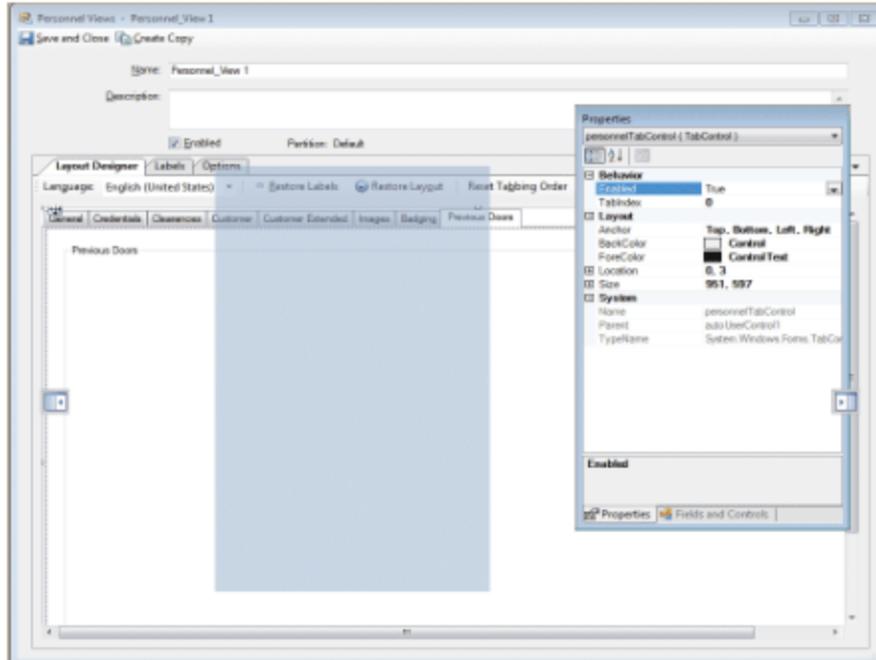
You can cause the Properties Panel to open as a floating window that you can re-position anywhere on your desktop (see [Figure 61](#) on [Page 213](#)).

To Float the Properties Panel

1. Hover over the Properties tab or the Fields and Controls tab anchor (indicated in [Figure 58](#) on [Page 210](#)). The Properties panel is displayed.
2. Double-click on the title bar of the Properties Panel to float the window.
3. To return the Properties Panel to its anchored position, double-click the title bar again.

Use the same procedure to float the Fields and Controls panel.

Figure 61: Floating Properties Panel Being Moved (translucent rectangle) Around the Desktop



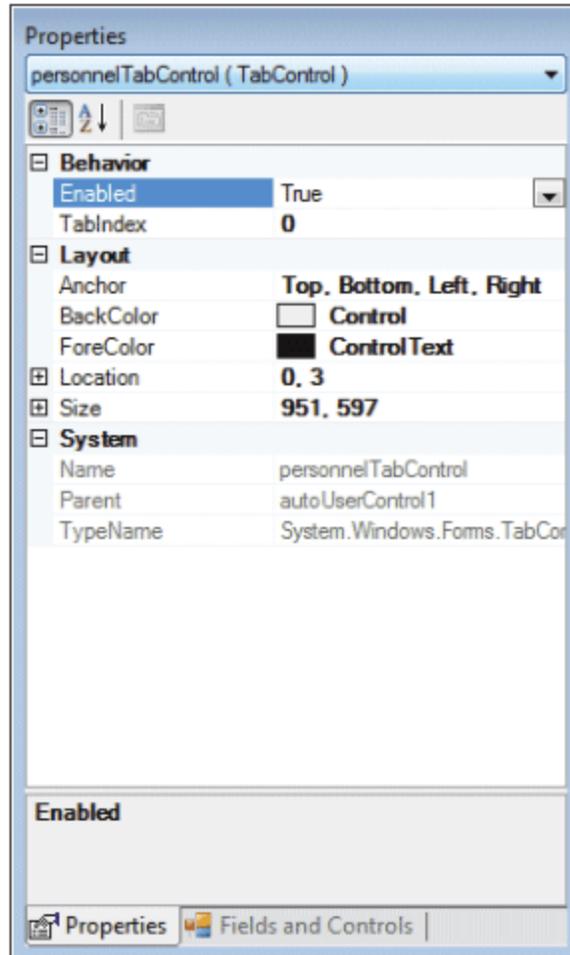
Personnel Views Properties Tab

The Personnel Views Properties tab (shown in [Figure 58](#) on [Page 210](#)) of the Personnel Views Properties Panel displays a form that lets you change the properties of a field or label on the Personnel View.

Example:

If you want to change the background color of a GroupBox that you added to a tab, you can select the GroupBox, display the Properties tab, and click in the **BackColor** property to select a background color for the GroupBox.

Figure 62: Properties Form on Properties Panel



See [Personnel Views Properties Tab Definitions](#) on [Page 214](#) for definitions of the properties on the Personnel View Properties Tab.

Personnel Views Properties Tab Definitions

The fields and buttons available on the Personnel Views Properties tab are shown in [Table 36](#) on [Page 215](#).

The properties that appear in this tab depend on the type of field/button you are editing. [Table 37](#) on [Page 215](#) provides definitions of the properties and identifies the types of fields with which each property.

Table 36: Personnel Views Properties Tab Fields and Buttons

Field/Button	Description
Selected Field	Select the field whose properties you wish to edit from this drop-down list.
Categorized 	This button arranges the properties in several categories (Behavior, Layout, System, and Translation).
Alphabetical 	This button arranges the properties in alphabetical order.
Property Pages 	Not available.

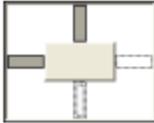
Fields and Controls Property Definitions

Table 37 on Page 215 describes the properties that are included on all fields and controls.

Table 37: Properties Tab - Fields and Controls Definitions

Field/Button	Type	Description
Behavior		
ReadOnly	TextBox	This property indicates whether the contents of a TextBox can be edited by an Operator. If set to True , the contents cannot be edited. If set to False , the contents can be edited.
Enabled	Tab Button CheckBox DateTimePicker TableLayout Panel	Set this property to True to allow an Operator to use this object. Set this property to False to make this object unavailable for Operator use. Example: A CheckBox with enabled set to False is unavailable for selection when an Operator is editing a Personnel record. Example: If you set Enabled to False for the User-defined Field Panel, the Panel and its contents are disabled when an Operator edits a Personnel record.

Properties Tab - Fields and Controls Definitions (continued)

Field/Button	Type	Description
TabIndex	Tab Label TextBox DateTimePicker CheckBox Selection Button Data Grid Tool Strip TableLayout Panel	<p>This property allows you to set the tab order (where the cursor moves to when an Operator clicks the Tab key) for individual objects on the Personnel View. The TabIndex values can range from 0 to 2147483647.</p> <p>NOTE: You can use the Reset Tabbing Order button on the Personnel View toolbar to set the overall tabbing order for the Personnel Views editor.</p> <ul style="list-style-type: none"> When an Operator presses Tab, the cursor moves to the field or button whose TabIndex is higher in the numerical tab order. When an Operator presses SHIFT+Tab key, the cursor moves to the field or button whose TabIndex is lower in the numerical tab order. <p>Example:</p> <p>If you change the TabIndex for MiddleName from 3 to 6, the tab order of the General Tab is changed so that Middle Name is next in the tab order after Last Name.</p> <ul style="list-style-type: none"> Labels have a TabIndex, but Tab does not move the cursor to a Label. The Label TabIndex is used when you define Hot Keys. <p>If you wish to create Hot Keys to tab to a field, the Label and the associated field must be in order, with no other fields with a TabIndex value in between. For example, if the Label's TabIndex is 3 and the field's Text Box has a tabindex of 6, if another label or field has a tabindex of 4 or 5, the Hot key won't work correctly. See Creating Hot Keys on a Personnel View Tab on Page 218 for more information.</p>
Layout		
Anchor	All	<p>This property lets you specify how you want the field to be anchored on the View. It determines how the field or control is affected when a user stretches the View. Click the drop-down and click on the anchors you want to enable.</p> <p>Example:</p> <p>This graphic shows Top and Left selected.</p>  <p>Most fields are anchored Top, Left, and do not change their sizes when the main control is resized. However, grid controls are anchored Top, Left, Bottom, Right, and these controls change their height and width accordingly when the main control is resized.</p>
AutoSize	Label CheckBox	<p>This property sets the size of the label to the minimum height and width if True. If this property is set to False, you can resize the label manually (only on Label and CheckBox).</p>
BackColor	Label TextBox DateTimePicker CheckBox Group Box Tab Control Button Data Grid Panel	<p>This property lets you specify the background color of the field or button from a drop-down list that shows sample colors. Typically labels and buttons are set to Transparent, while fields are set to a system color such as Window or Control. But you can use this property to assign a different color to the text to provide emphasis.</p> <p>Example:</p> <p>If you change the BackColor of the Design button on the Customer tab to Red, the face of the button appears in Red.</p> <p>The BackColor drop-down list has tabs for System, Web, and Custom (RGB) colors.</p> <p>If you right-click on a blank color on the Custom tab, a Windows color picker is displayed that allows you to define a custom color.</p>

Properties Tab - Fields and Controls Definitions (continued)

Field/Button	Type	Description
ForeColor	Label TextBox DateTimePicker CheckBox Group Box Tab Control Button Data Grid Panel	<p>This property lets you specify the text or color of the field or button from a drop-down list that shows sample colors. Typically labels and buttons are set to ControlText (black), while fields are set to a system color such as WindowText. But you can use this property to assign a different color to the text to provide emphasis.</p> <p>Example:</p> <p>If you change the ForeColor of the Design button on the Customer tab to Red, the text on the button appears in Red.</p> <p>The ForeColor drop-down list has tabs for System, Web, and Custom (RGB) colors.</p> <p>If you right-click on a blank color on the Custom tab, a Windows color picker is displayed that allows you to define a custom color.</p>
Location	CheckBox DateTimePicker TextBox TableLayout Panel	<p>This property specifies the X-axis and Y-axis coordinates for the position of the top left corner of the object on the tab or box. You can enter the value as two comma-separated values, or you can enter the values individually in the X and Y properties after clicking . You can also move the control with the mouse to change these values.</p>
Size	All	<p>Two comma-separated integers that specify the width and height, respectively, of a field or label. You can enter the value as two comma-separated values, or you can enter the values individually in the Width and Height properties after clicking .</p> <p>You can also change the size of the control with the mouse to change these values.</p> <p>Example:</p> <p>200, 145 represents a field that is 200 pixels wide by 145 pixels high. For many fields, the height is a fixed number.</p>
TextAlign	Label Integer Date TextBox	You can select whether text or numbers are Left-aligned, Right-aligned, or Center-aligned.
System		
Name	All	This read-only field displays the name of the field or label in the system. This name also appear in the Name column on the Labels tab, and on the context (right-click) menu.
Parent	All	This read-only field displays the name of the parent object for a field or label. Often this represents the Group Box which contains the field/control.
TypeName	All	This read-only field displays the type of the field or label.
Translation		
DefaultLabel	Label GroupBox CheckBox Button Tab Page	This read-only property shows the system label that displays in a dynamic view. This property is not available for new custom labels that you create.

Properties Tab - Fields and Controls Definitions (continued)

Field/Button	Type	Description
Label	Label GroupBox CheckBox Button Tab Page	This property provides a user-editable field label for an object in a Personnel View. You can change the Label text for an object such as a Button or GroupBox. For example, You could change the label for the Print Badge button to "Click to print badge".
UseDefaultLabel	Label CheckBox GroupBox Button	The value is True if the DefaultLabel and Label properties are equal. This property is not available for new labels that you create. If you set this flag to True , the Label property is changed to match the DefaultLabel property. If you change the Label property so that it no longer matches the DefaultLabel, this flag is set to False.

Creating Hot Keys on a Personnel View Tab

You can create Hot Keys for fields on a Personnel View. Hot Keys are navigation shortcuts that an Operator can use to move the cursor to specific fields. When you click **Alt + Hot Key**, the cursor moves to the field associated with that Hot Key.

NOTE

Some of the Hot Keys that were defined for Personnel fields in previous versions have changed because of Personnel view changes.

Hot Keys are defined in the properties of a Label. The Hot Key is defined by placing an ampersand ("&") in the Label in front of the Hot Key letter or symbol. The Hot Key is displayed as an underscored letter in the Label.

NOTE

If more than one label is assigned the same Hot Key, clicking **Alt + Hot Key** more than once tabs to the additional fields.

However, if you assign a field in a Personnel View tab the same hotkey that is also assigned to a main window toolbar command (**Alt+S** for Save and Close, **Alt+w** for Save and New, **Alt+t** for Current View), the main window toolbar hotkey assignment is ignored unless the cursor is in the toolbar.

Example:

The **Middle Name** label is displayed as "Middle Name" indicating a Hot Key of "M"; when you click **Alt+m**, the cursor moves to the **Middle Name** field.

To Define a Hot Key for a Personnel View Field

1. From the Layout Designer, select the label for a field.
2. Right-click and select **Properties**.
3. In the Label property, type an "&" in front of the letter or number that you want to act as a Hot Key.

Example:

If you want to change the Hot Key for **Last Name** to "N", change the label from **&Last Name** to **Last &Name**.

4. Save the change by clicking **Save and Close**, or continue editing.

Personnel Views Fields and Controls Tab

The Personnel Views Fields and Controls tab (shown in [Figure 63](#) on [Page 219](#)) of the Personnel Views Properties panel displays a tree structure that organizes the tools and fields that can be added to a Personnel View. When you remove a field from a Personnel View, that field is included on the Fields and Controls tab so that it can be added to any tab in the Personnel View you are editing.

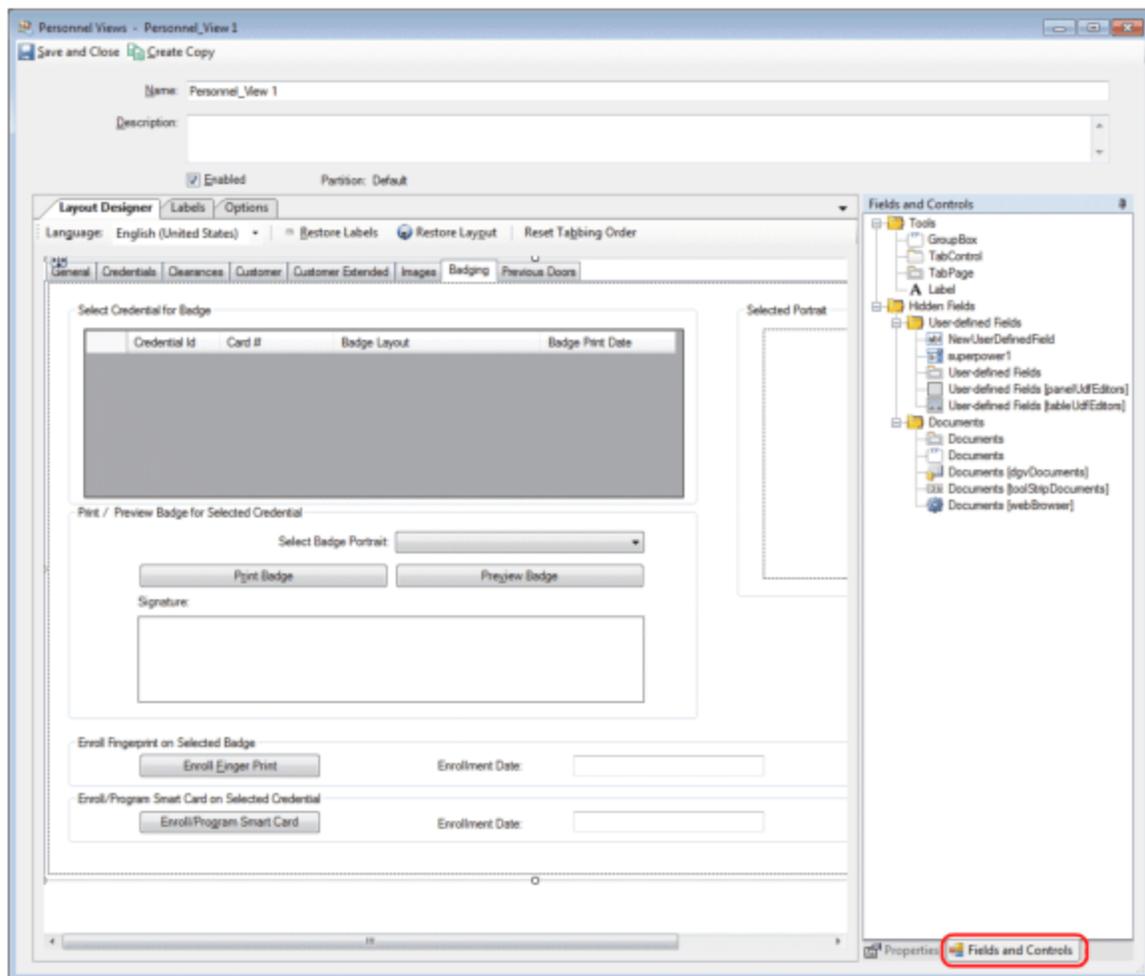
Example:

If you want to move the **Text2** field from the Customer tab to the General tab, delete the **Text2** field from the Customer tab, then navigate to the General tab, display the Fields and Controls tab, and look in the tree under Hidden Fields, Customer tab to locate the Text2 TextBox, then drag the Text2 TextBox onto the General tab.

Also, if User-defined fields are added to a C•CURE 9000 system, those fields appear in the Fields and Control tab Hidden Fields User-defined fields folder, available to be added to any tab in the Personnel View. See [Adding User-defined Fields to a Personnel View](#) on [Page 220](#) for more information.

See [Personnel Views Fields and Controls Tab Definitions](#) on [Page 220](#) for definitions of all fields and buttons on the Personnel Views Fields and Controls Tab.

Figure 63: Fields and Controls Tab



The Properties Views Properties panel Fields and Controls tab can be hidden or displayed in several ways (see [Figure 58](#) on [Page 210](#)).

Personnel Views Fields and Controls Tab Definitions

The following fields and buttons shown in [Table 38](#) on [Page 220](#) are available on the Fields and Controls tab.

Table 38: Personnel Views Fields and Controls Tab Definitions

Field/Button	Description
Tools Folder	This folder contains widgets for adding GroupBox, TabControl, TabPage, and Label objects to a Personnel View. You can select one of these widgets and drag it to a Personnel View. These widgets are always available, allowing you to create as many custom widgets of the specified type as you need.
GroupBox	The GroupBox widget can be added to a Personnel View or TabPage. The GroupBox is used to group together fields to help a user perceive the relationship between the fields.
TabControl	A TabControl can be added to a Personnel View or a TabPage. The default TabControl has two TabPages, but additional TabPages can be added to the TabControl. After adding a TabControl, you can add fields and other objects to its TabPages.
TabPage	A TabPage can be added to a TabControl.
Label	A Label can be added to any tab in the Personnel View. Click the tab on which you want to place the label, then drag the label to the tab. You can position the label on the tab by dragging it around or by setting its Location on the Properties tab.
Hidden Fields Folder	
Fields	<p>All fields that are not present on the Personnel Views tabs are available to be dragged onto a tab. Field are organized based on their original position on a tab in the default Personnel View. User-defined fields are available in a separate folder. You can drag a field from the Hidden Fields folder to any tab in the Personnel View.</p> <ol style="list-style-type: none"> 1. Click the tab on which you want to place the field, then drag to field to the tab. 2. Position the field on the tab by dragging it around or by setting its Location on the Properties tab. <p>Dragging a field onto the View creates both a label (if one exists) and an edit control for editing the field on the View. The label is located to the left of the drop point and the edit control is created to the right of the drop point.</p> <p>Example:</p> <p>The Generate Random Card Number button is on the default Credentials tab. If you remove this button from the Credentials tab, it appears under Hidden Fields>Credentials. This button has no label, so it appears as ab in Hidden Fields, and when you place it on a view, it appears as bt.</p>

Adding User-defined Fields to a Personnel View

When you create new User-defined fields:

- If the Personnel View is one of the Default Views included with the system, the User-defined fields are not shown. (You can create a copy of a default view and add User-defined Fields to the copy.)
- If the Personnel View is created after the User-defined fields were created, the User-defined fields appear on the User-defined Fields tab in the Personnel View, if the Operator creating the View has at least read access to the User-defined fields.

- If the Personnel View is created before the User-defined fields were created, the User-defined fields do not appear in the Personnel View, and would need to be added manually. The User-defined Fields are available on the Fields and Controls tab in the **Hidden Fields>User-defined Fields** folder.

See the User-defined Fields chapter in the *C•CURE 9000 Software Configuration Guide* for more information about User-defined fields.

To Add User-defined Fields to a Personnel View

1. Click the Personnel Views tab in the Personnel Views editor on which you want to add a User-defined field.
2. Display the Properties Panel (see [Personnel Views Properties Panel on Page 210](#)).
3. Click on the **Fields and Controls** tab.
4. Click **Hidden Fields**, then **User-defined Fields** to open the folder contain the User-defined fields.
5. Select the field that you want to add to the view and drag it to a location on the Personnel View tab. The field and its label are positioned on the Personnel View.
6. You can use **Save and Close** to save the view, or continue editing.

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