GREENWALD INTELLICARD

Smart Card Management System 2

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Table of Contents

INTRODUCTION 1

1.1.1. Welcome

Welcome! With the purchase of the Greenwald Intellicard Smart Card Management System 2 (SMS2), you have opened the door to the world of integrated computer managed smart card systems. Using the Greenwald Intellicard System, you will have the power to effectively manage numerous laundry machines, Card Transaction Stations and Door Access Readers, all with the convenience of an easy-to-use windows-based software package – SMS2.

Previous users of SMS or other smart-card management software packages will find SMS2 packed with new features and innovative administration tools, making it the ideal system for addressing multiple commercial laundry and access control solutions.

New users of the Smart Card Management System will find SMS2 to be both intuitive and easy to learn.

Experienced and new SMS users alike will quickly benefit from the Greenwald Intellicard system, and will soon enjoy:

- Reduced operating expenses.
- Increased profits.
- Reduced vandalism.
- Financial accountability.
- Controlled building access.

1.2. Overview

The Smart Card Management System is a flexible and powerful management tool that creates an electronic cash environment where the need for handling and accounting for coins is eliminated. In addition, smart card technology enables greater flexibility in controlling pricing functions.

SMS2 effectively integrates not only a diverse line of Laundry Machine Readers and Card Transaction Stations, but also an advanced electronic Door Access system.

Before we can understand how SMS2 integrates these components, we will review the Greenwald Intellicard system components.

1.2.1. System Components

1.2.1.1 Smart Cards

An obvious component to any smart card system is the Smart Card itself. Greenwald Intellicard Smart Cards are a durable, high security microprocessor-controlled storage medium. The smart card has the ability to store large amounts of data in a completely secured environment, preventing unauthorized duplication or alteration. These features combined with a long life span make the Greenwald Intellicard smart card an ideal medium for commercial laundry and door access applications.

Two card types are used in the Greenwald Intellicard System:

- **User Cards** are used to purchase commercial laundry services or are used for door access applications. Typically, they will be distributed by the building manager or purchased from a Card Transaction Station.
- **Management cards** are used to initialize and set-up laundry, transaction and Door Access Readers. They are also used to collect audit information from the different Laundry Machine Readers, Card Transaction Stations and Door Access Readers, set pricing and time functions and run diagnostics on field equipment.

1.2.1.2. Machine Card Readers

The Machine Card Reader validates monetary values placed on smart cards by customers and deducts the appropriate vend price before initiating a cycle. Machine Card Readers are equipped with displays, which provide pricing, and operation instructions to the consumer as well as to system administrators and service personnel. Machine readers also store all machine activity, allowing this data to be retrieved and analyzed with the SMS2 reporting function.

1.2.1.3. Card Transaction Stations

Card Transaction Stations allow for unattended smart card purchase and recharge (adding value to an existing card). Customers insert cash into a bill acceptor or swipe a credit/debit card, and the transaction station either dispenses a smart card or adds value to a previously purchased card. System Administrators and/or service personnel to account for currency or credit/debit card transactions can periodically audit card Transaction Stations.

1.2.1.4. Door Access Readers

Door Access Readers are sophisticated access control systems that are installed with an electronic locking device such as an electric strike or magnetic lock. These units can be programmed to allow access to specified cardholders, and can also be used to deny entry into a building or room at any time.

1.2.1.5. Smart Card Management System

The focus of this manual will be the operation of the Smart Card Management System. Once properly installed and set up, functions of SMS2 enable the operator to:

- Set up laundry Machine Card Readers and Card Transaction Stations with pricing and functions defined according to your needs.
- Set up and maintain an “electronic” key system with the Door Access Manager.
- Retrieve and view audit reports from all equipment including usage reports, money collected and access reports.
- Set up PC stations to issue and sell user cards.
- Maintain and update all pricing and setup information.

1.2.2. The Big Picture

So how does it all work? The System Administrator enters the necessary data into the software: locations, machines, pricing and other information SMS2 will need to manage a system.

When data entry is complete, the System Administrator can create different types of Smart Cards to perform various functions. Each Smart Card can be used to perform one or several of the functions listed below.

1.2.2.1. Management Cards

Login Cards – Smart Cards that allow or restrict the operation of SMS2. Additional login cards allow other users to become System Administrators.

Setup Cards – Smart Cards that utilize data entered into SMS2 to program each individual unit - laundry machines, card transaction machines and Door Access Readers.

Data Collection Cards – Smart Cards used to collect data stored on individual machine readers, transaction machines and Door Access Readers and transfer this data to SMS2. The collected data from these cards create reports for later analysis.

Utility Cards – Smart Cards used to allow laundry machines to operate in service mode for necessary maintenance. Utility cards also allow the set up of time/date information for the machines.

1.2.2.2. User Cards

Cash Cards – Smart Cards purchased from a Card Transaction Station or issued through SMS2. These cards are used to purchase vends, and can be revalued at a Card Transaction Station or by the software.

User Cards – Smart Cards issued to users that have been assigned a unique User Identification. This enables system administrators to track individuals' usage of Laundry Machine Readers, Card Transaction Stations and Door Access Readers.

Once the data is entered, and the appropriate cards have been created for setup and distribution to users, the system is ready to be used. Users will be able to purchase cards from Card Transaction Stations (if available), add value to cards, and use laundry machines equipped with the Greenwald Intellicard Laundry Machine Readers.

1.3. Understanding SMS2

1.3.1 What is SMS2?

Smart Card Management System 2 (SMS2) is the managing component of the Greenwald Intellicard Smart Card System. This versatile, easy to use software package can manage an unlimited number of laundry facilities as well as control door access functions. The primary tasks of the SMS2 software are to manage data, create cards and generate reports.

1.3.1.1. Data Management

The software sorts, tracks and displays all data relating to:

- Laundry machines.
- Card Transaction stations.
- Door Access Readers.
- System users.

1.3.1.2. Card Creation

Along with the PC Smart Card Reader, SMS2 creates and reads all the cards necessary to manage the Greenwald Intellicard Smart Card system including:

- Machine setup cards.
- Utility Cards.
- Data Collection Cards.
- User Cards.

1.3.1.3. Report Generation

A comprehensive selection of pre-designed reports has been included with the SMS2. Reports are easily viewed or printed and include:

- Cash collected.
- Machine usage.
- Door Access usage.
- Location information

Additionally, custom report generation is possible with SMS2.

1.3.2. How does SMS2 Work for You?

SMS2 is the central management tool used to control your entire Greenwald Intellicard Smart Card System. From one PC, you can quickly and easily customize the functions and operations of each machine used in the system.

Customization includes pricing, time and cycle function specifications for laundry machines, as well as location restrictions. This means that changing the vend cost for a washer or deciding to run specials at certain times of the day is now just a few key strokes away. Specific location pricing and restricting the use of cards to only certain locations is also accomplished in the SMS2 software.

The features of the Greenwald Intellicard Smart Card System combined with the ease of use of the SMS2 software offers greater accountability and the ability to save both time and money.

1.3.2.1. Accountability

All transaction information in SMS2, Laundry Machine Readers, Card Transaction Stations and Door Access Readers can be recorded. SMS2 has the ability to gather and manage the transaction information. This means that:

- When service personal use a service card, the date and time of the action can be recorded.
- Collectors are accountable for cash collected in the transaction stations.
- Machine usage by individual customers can be tracked.

1.3.2.2. Save Time

The Smart Card System does away with the great expense and time resources needed to handle and account for coins. SMS2 also has other valuable time saving features:

- The SMS2's easy to learn and use interface allows you to be up and running in just a short period of time.
- The cloning feature in SMS2 allows for quick setup of similar machines and users.
- Quick and easy generation of reports that let you keep track of your entire operation—at a glance!

- Remote programming is currently available for the Credit Card and Multi Transaction Systems.

Now that you know more about the Greenwald Intellicard Smart Card Management System 2 and how it can help you better operate and administrate you system, let’s get started…

GETTING STARTED WITH SMS2

2

2.1.1. Overview

This chapter will cover the basic steps for getting started with SMS2:

- System requirements for installation.
- Installing SMS2 software and hardware.
- Starting SMS2 once it is installed.
- A review of the SMS2 Interface
- Working with Smart Cards

A section covering the overall architecture of SMS2 including navigation has been included as well.

2.2. Installation

This section reviews the PC hardware requirements for running SMS2 and describes both the software and hardware installation. Users upgrading from SMS1 should consult with Greenwald Intellicard Technical Support Department for further details at 1-800-221-0982.

2.2.1. System Requirements

Following are the minimum system requirements necessary for SMS2 to be installed and used on your PC:

- Pentium or equivalent processor.
- Windows 95 or Windows 98 Operating System.
- 32 Megabytes of RAM (Random Access Memory).
- Available serial port.
- 40 Megabytes disk space (Hard Drive).
- PS2 Keyboard or Mouse Port

Note:

40 Megabytes of disk space is the minimum system requirement. Operators managing large facilities or storing large amounts of data in SMS2 will need more available disk space.

2.2.2. Software Installation

Note:

SMS2 is designed to run on a local hard drive. Network drives are not supported at this time.

1. Insert the SMS2 CD-ROM into your computer's CD-ROM drive and the Auto-Run program will begin. If Auto-Run starts proceed to Step 2 (Page 25). If Auto-Run does not start proceed to Step a. (below).

Note:

In order for Auto-Run to work properly, "Auto Insert Notification" must be enabled in the Windows operating system. If it is not, consult your Windows documentation to enable it, or follow these steps:

a. Click the Start button located on the Windows Task Bar (Figure 2.1).

b. Click Settings (Figure 2.1).

c. Click Control Panel (Figure 2.1).

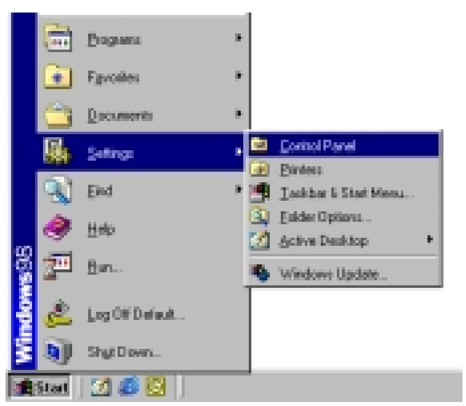

Figure 2.1 Starting Alternate SMS2 Installation

d. In the Control Panel folder, double click the add/remove icon (Figure 2.2).

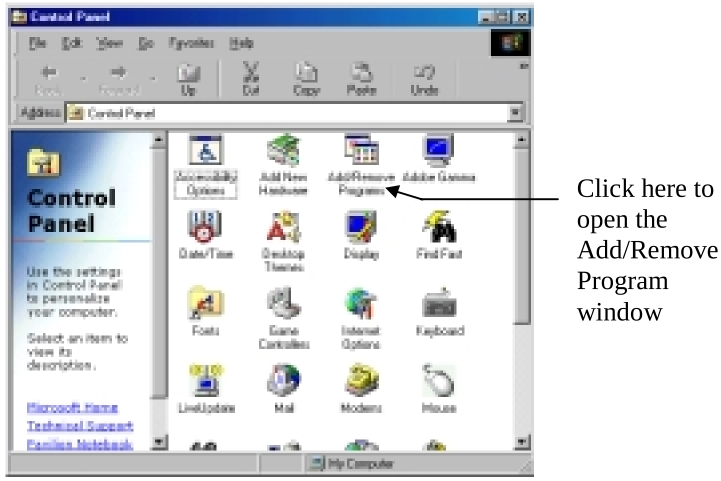

Figure 2.2 Opening the Add/Remove Program Window

e. Click the Install button located at the top of the window (Figure 2.3).

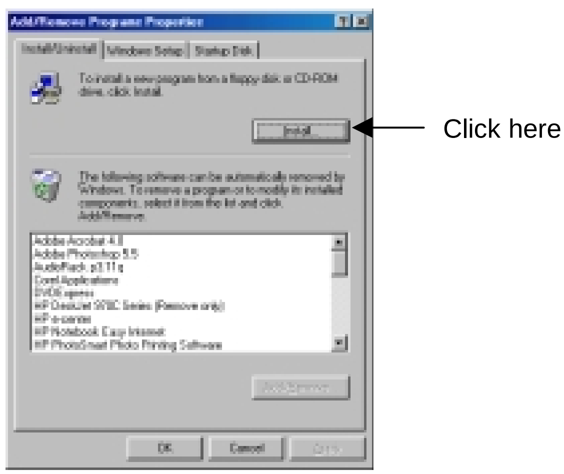

Figure 2.3 Add/Remove Programs Properties Window

f. Click Next (Figure 2.4).

Figure 2.4 Insert CD-ROM Window

g. Click Finish (Figure 2.5).

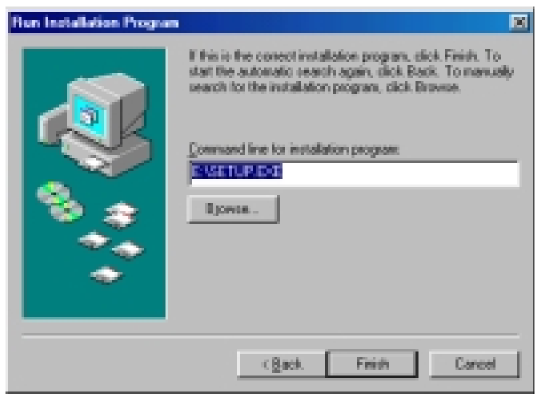

Figure 2.5 To Complete Alternate Installation

2. A license agreement will appear. Please read this carefully and click the Yes button to accept the license conditions (Figure 2.6).

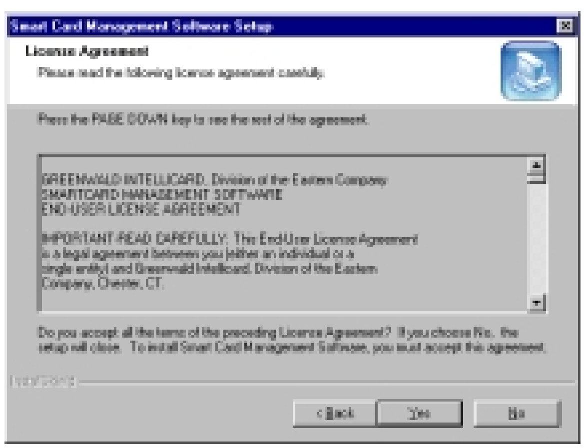

Figure 2.6 Licensing Agreement

3. In the Choose Destination Location window, click Next to accept the default folder location, or click the Browse button to install SMS2 elsewhere. If you choose to install the software elsewhere, make note of where you have installed it (Figure 2.7).

Figure 2.7 Choose Destination Location Window

4. When the Select Program Folder window appears, click Next to complete the installation, or click Browse to select a different folder for custom settings. Now click Next to complete the installation (Figure 2.8).

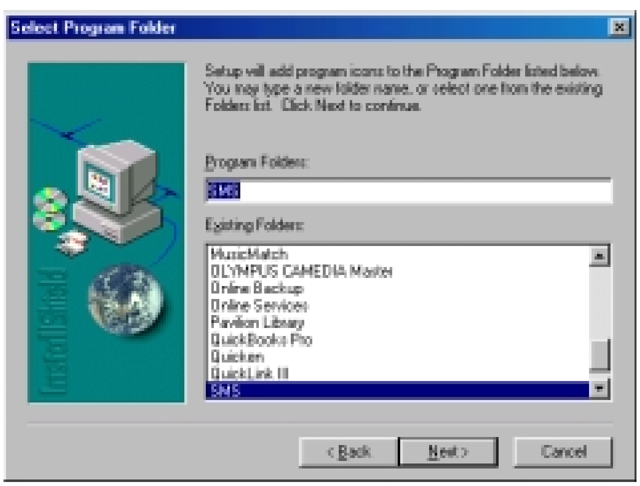

Figure 2.8 Select Program Folder Window

Caution:

It may take several minutes for the install to complete. **Do Not Reboot Until Installation is Completed!**

5. A window may appear prompting you to restart your computer. If so, restart your computer at this time. If you are not prompted to restart your computer, you are ready to run SMS2.

Installation of SMS2 onto your system is now complete. An SMS icon has been placed both on your desktop and in the programs menu of the Windows Task Bar (Figure 2.9).

Figure 2.9 SMS Icon

2.2.3. Hardware Installation

In order to operate SMS2, a Tritheim Smart Port Smart Card Reader/Writer (PC Card Reader) must be installed. This reader must be purchased with your other system components. Follow these steps for the PC Reader installation:

1. Close all programs using the serial port connection you have designated for use with the SMS2 PC Reader.
2. Plug the PC Reader’s 9-pin serial connector into the PC’s serial connection.
3. Plug the PC Reader’s adapter between the PC’s PS2 keyboard or mouse port and the PC.

Since the PC Reader driver installation has been completed during the software installation process and SMS2 automatically searches all serial and parallel ports for the reader, the installation process is now complete.

You are ready to begin using SMS2!

2.2.4. Starting SMS2 for the First Time

Once the software and hardware installation have been completed, follow these steps to start the software:

2. Double click the SMS icon located on the desktop of your PC (Figure 2.9). The Login window will appear.

Tech Tip

If you find that SMS2 will not start or that the software does not recognize the PC Reader, reboot your computer.

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3. Insert either a Greenwald Intellicard User or Management Smart Card (Sections 2.4.1) into the PC reader. Be sure that the smart chip is facing up and leading into the reader (Section 2.4.2).
4. Enter the 4-digit default PIN (Personal Identification Number), 1-2-3-4, and click the Ok button to begin SMS2 (Figure 2.10).

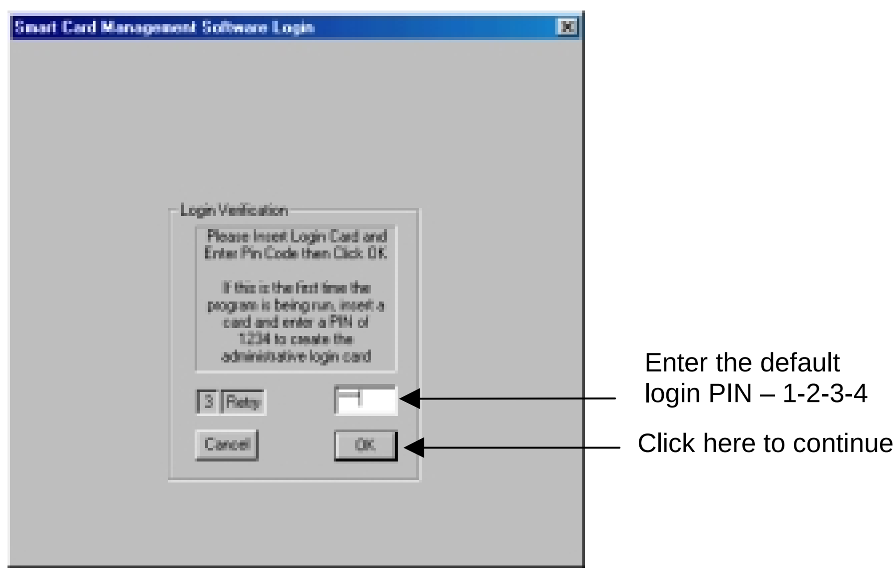

Figure 2.10 Login Window

5. Label this card as your login card.
6. Once a user has successfully logged into SMS2 the Login Card can be removed from the PC Reader at anytime.

Warning!

The Greenwald Intellicard Smart Card used for this process is now the default system administrator card. Unless other system administrator cards are created this is the **only** means to access the software. It is recommended that at least one other administrator card be created at this time (See Chapter 4).

Caution:

In addition to the Smart Card you created to be the system administrator card, you will need your PIN to access the software. Together they are the **only** means of accessing the SMS software. It is recommended that the PIN be changed immediately to prevent any security compromises (the Login window states that 1-2-3-4 is the default PIN). Be sure to keep the System Administrator card in a safe place so that you do not inadvertently get locked out of the software.

2.2.5. Normal SMS2 Login

1. Double click the SMS2 icon located on the desktop of your PC (Figure 2.9). The Login window will appear.
2. Insert a Login Card (Section 2.4.2)
3. Enter the correct Personal Identification Number (Figure 2.10).
4. Click OK to start the software (Figure 2.10).

2.2.6. The SMS2 Interface

SMS2 is a modular software package that can be purchased in different configurations. The modules that make up SMS2 are called managers. Each manager has been developed to function with specific components of the Greenwald Intellicard System. The following is a description of each manager.

2.2.6.1. Login Controls Manager (Figure 2.11)

Security has been a major consideration in the development of the SMS2 software. Although the software's ability to manage an entire organization's laundry and door access equipment makes it convenient, it can also make it vulnerable. For this reason, the Login Controls Manager can control access and administrative privileges in SMS2.

In the Login Manager you will be able to enter information about each SMS2 user, assign their Personal Identification Numbers (PIN), define their SMS2 privileges and restrictions, and issue them Login Cards.

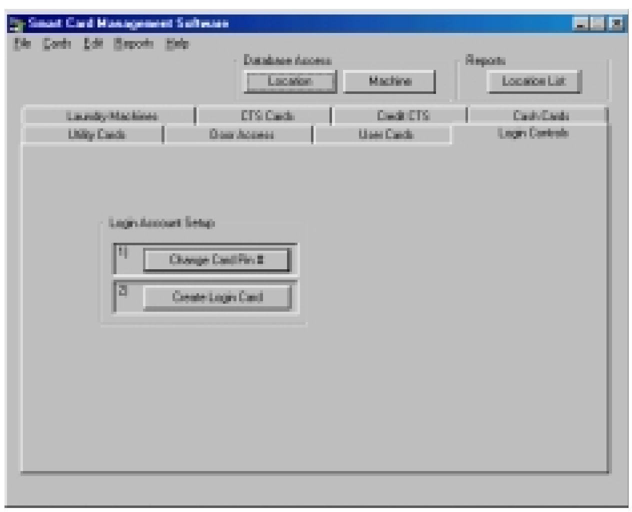

Figure 2.11 Login Controls Manager

2.2.6.2. Locations Manager (Figure 2.12)

The Locations Manager is included with all SMS2 software packages. Every machine and user that is entered into SMS2 is assigned to a Location. Utilizing multiple locations allows you to restrict machine usage by location, control door access, and also gives you the ability to produce meaningful reports. To use SMS2 it is necessary to set up at least one location. All the other managers utilize information from the Locations Manager.

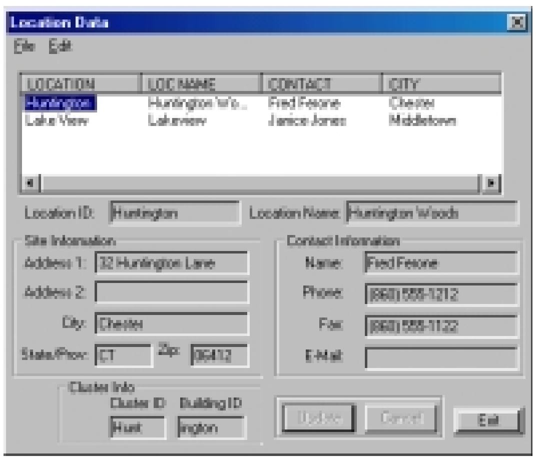

Figure 2.12 Locations Manager

2.2.6.3. Machines Manager (Figure 2.13)

The Machines Manager tracks all Laundry Machine Readers, Card Transaction Stations and Door Access Readers being managed by the SMS2 software. In the Machine Manager you will be able to assign each machine an individual identification, location, and make and model number. As with the Locations Manager, the information stored in this manager is utilized by other managers in the SMS2 software.

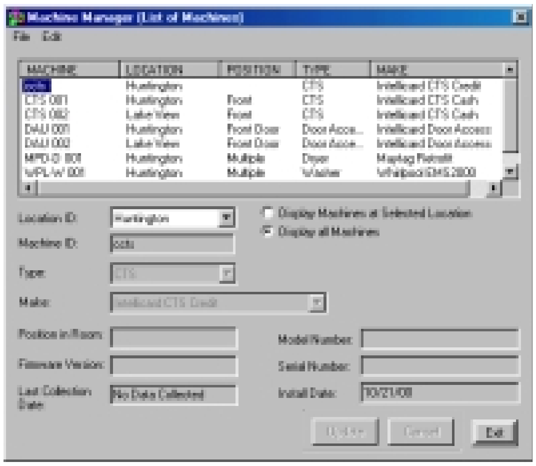

Figure 2.13 Machines Manager

2.2.6.4. User Cards Manager (Figure 2.14)

The User Cards Manager is an advanced feature of the SMS2 software package. In the User Cards Manager, specific identities can be assigned to a particular Smart Card. This allows for individual programming of cards for both the Door Access Readers (i.e. limiting usage to one particular location) as well as data collection based on individual usage of Laundry Machines and Card Transaction Stations.

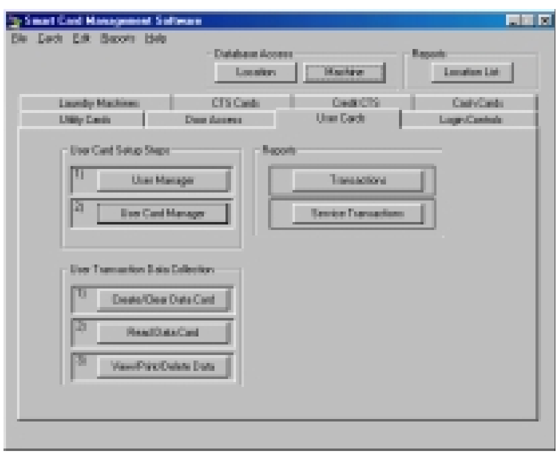

Figure 2.14 User Cards Manager

2.2.6.5. Laundry Machines Manager (Figure 2.15)

The Laundry Machines Manager is the module that manages all information relating to washers, dryers and stack laundry machines. In addition to being able to access the Locations Manager and Machines Manger directly from within the Laundry Machines Manager, other functions include:

- The management of laundry machine readers including pricing, cycle and display information.
- The collection and reading of laundry machine transaction data.
- Printing of laundry machine reports.
- Administration of special pricing based on peak usage

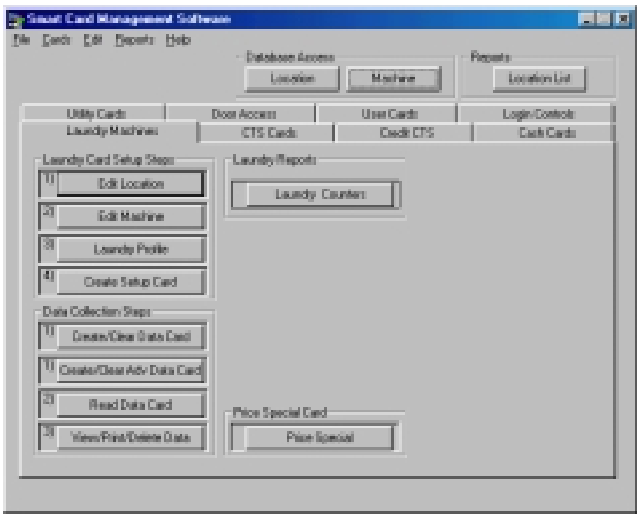

Figure 2.15 Laundry Machines Manager

2.2.6.6. CTS Cards Manager (Figure 2.16)

The CTS Cards Manager is used for operating and maintaining Cash Transaction Machines. All functions of the Cash Transaction Machines are set up within this manager. These functions include card deposit charge, maximum card values, display messages, bills to be accepted and data collection cards. There are also several reports available here for the Cash Transaction Machine transactions.

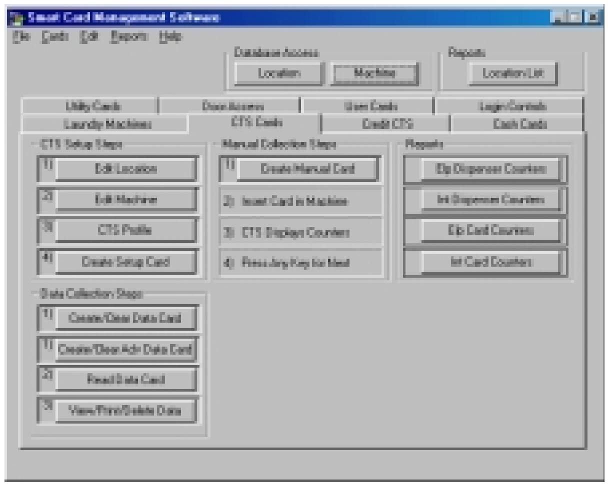

Figure 2.16 CTS Card Manager

2.2.6.7. Credit CTS Manager (Figure 2.17)

The Credit CTS Manager programs the Credit Card Transaction Station and the Multi Card Transaction to allow cashless recharge and value of Smart Cards. The SMS2 software allows both dial-up modem access and direct access via PC to set up and data collect the Credit and Combo CTS. Once set up, the Credit CTS is now able to accept debit and credit cards for transactions.

Note:

The Credit CTS is password protected to prevent unauthorized outside access. This adds additional security to the sensitive data being collected and stored in the Credit Card Transaction Station.

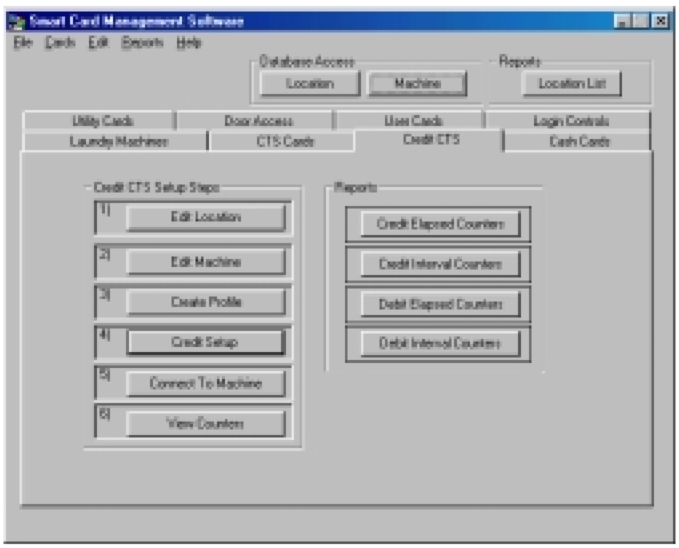

Figure 2.17 Credit CTS Manager

2.2.6.8. Cash Cards Manager (Figure 2.18)

The Cash Cards Manager allows SMS2 software users to create Cash Cards from their computer when a transaction station is not being used at a location.

Creating Cash Cards using this manager also allows for individual Cash Cards to be created with specific monetary values preset on each card.

The Cash Cards Manager can also be used as the SMS2 “cash register.” It tracks every debit and credit made in the software, accounting for all funds added, subtracted and by whom.

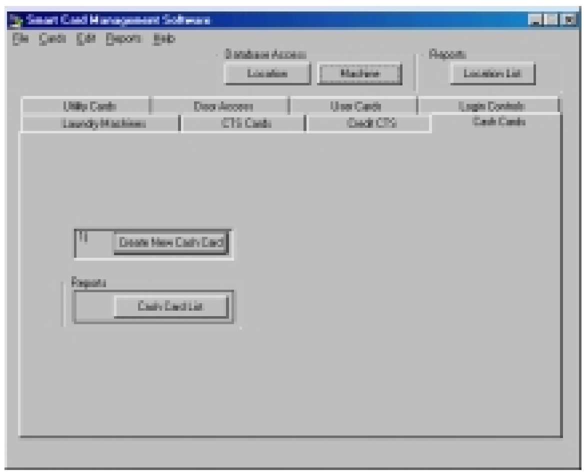

Figure 2.18 Cash Cards Manager

2.2.6.9. Utility Cards Manager (Figure 2.19)

The Utility Cards Manager is used to create Smart Cards that set the internal clocks of Laundry Machine Readers and Door Access Readers. Other Utility Cards can initiate a service mode operation in Laundry Machine Readers and Card Transaction Stations.

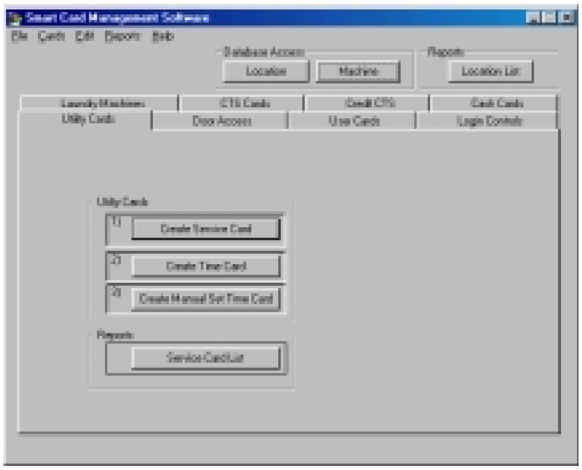

Figure 2.19 Utility Cards Manager

2.2.6.10. Door Access Manager (Figure 2.20)

The Door Access Manager allows you to determine access to buildings and rooms. This can limit access to the laundry room as well as provide added security to sensitive areas of a business or building. The Door Access Manager allows you to program the relay delay, as well as run reports containing such information as who uses a location and when.

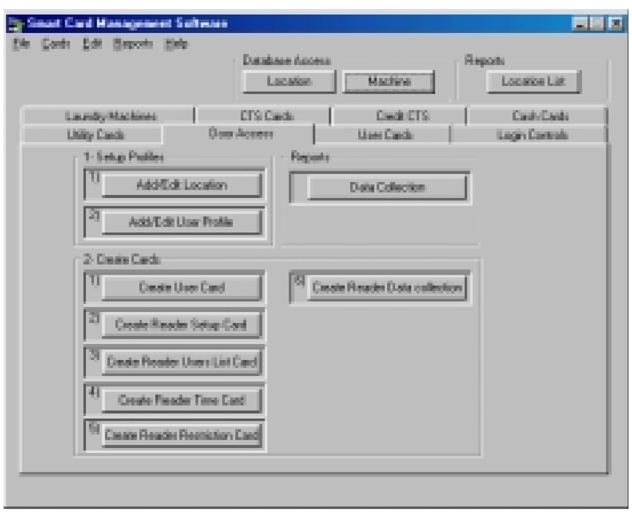

Figure 2.20 Door Access Manager

2.3. SMS2 Functions

As stated earlier, SMS2 is designed to be intuitive and easy to use. It puts at your fingertips the tools you need to manage your laundry facilities. All SMS2 features and commands are easy to use and are just a mouse click away.

In this section the SMS2 feature and command navigation will be explained.

2.3.1. Tabs

The managers are divided into tabs. To open a manager, simply click on the corresponding tab (Figure 2.21).

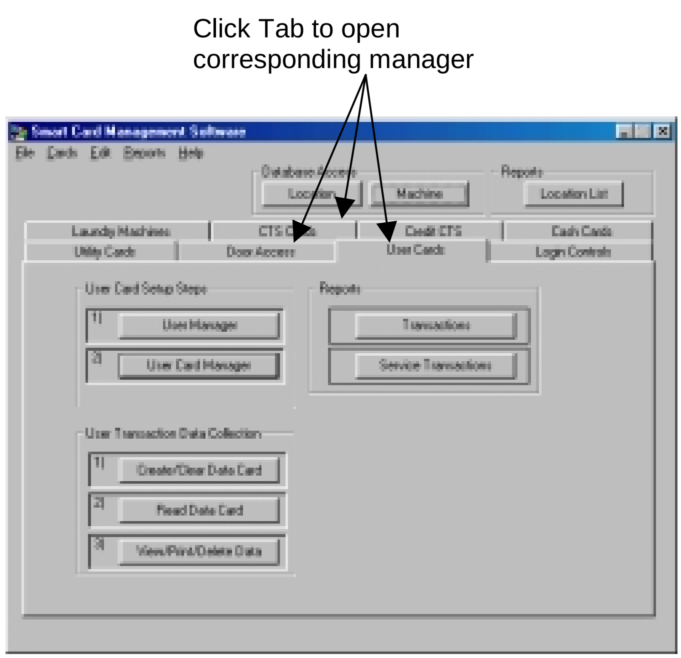

Figure 2.21 Tabs

2.3.2. Menus

Menus, a common Windows element, are widely used in the SMS2 software. SMS2 displays menus in a Menu Bar at the top of the screen (Figure 2.22). You can choose commands from the menus in two ways:

- Click the menu name to access the menu. When applicable, click the name of the submenu, and then click the command you need.

- Press the ALT button on your keyboard to activate the Menu bar, and use the cursor keys to navigate through the menus and submenus. Once a desired command is highlighted, press the enter key.

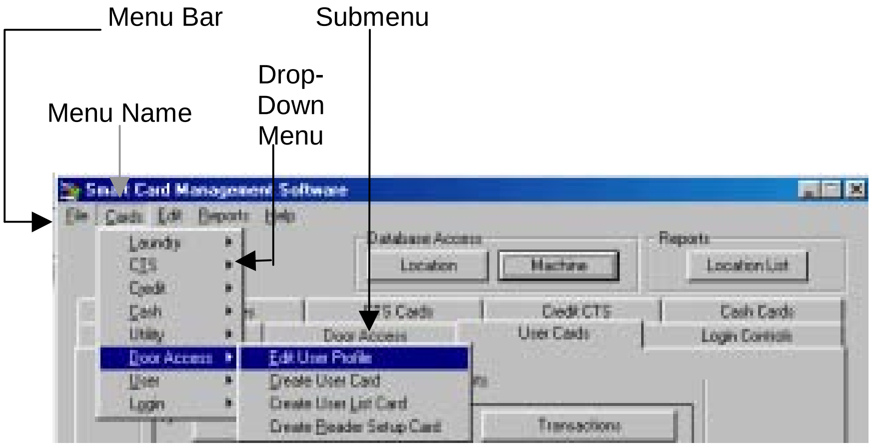

Figure 2.22 Menus

2.3.3. Buttons

SMS2 is equipped with both command and database access buttons (Figure 2.23). These allow for easy navigation and shortcuts to commonly used commands. To activate a button, simply point to it with your mouse and click. Using the Tab key to highlight the desired command and then pressing the Enter key can also activate command buttons.

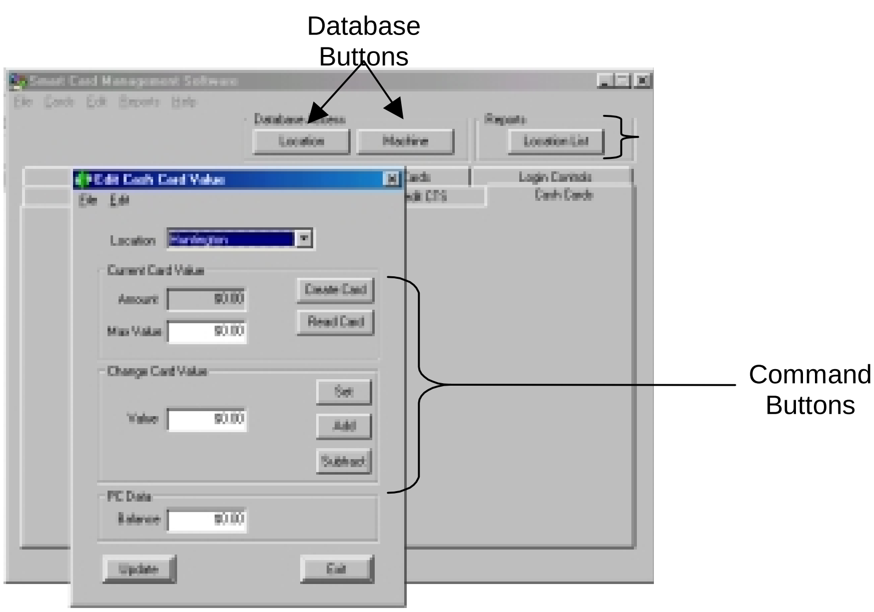

Figure 2.23 SMS2 Buttons

2.3.4. Keyboard Navigation

This manual will provide instructions for SMS2 using a mouse or another PC pointing device. Since SMS2 uses standard Windows navigation elements, keyboard navigation can also be used.

When working with the records in SMS2 the tab key is used to navigate through the fields, options and command buttons within the record. The space bar is used to enable or disable options and the Enter key is used to activate a command button.

2.4. Working with Smart Cards

There are three different types of smart cards used in the Greenwald Intellicard system. The primary difference between each one of these cards is their memory capacity. The card types are as follows:

- User Card (256 Byte memory capacity)
- Management Card (1K memory capacity)
- 8K Management Card (8K memory capacity)

For certain card applications (Section 1.2.2), it is necessary to use a specific card type to insure that there is enough memory for its assigned functions. In other cases, more than one card can be used. When possible, it is most cost-effective to use the lowest memory card.

2.4.1. Visually Identifying a Card

The Smart Chip for each card has a unique appearance. Figure 2.24 shows the different types of smart-chips.

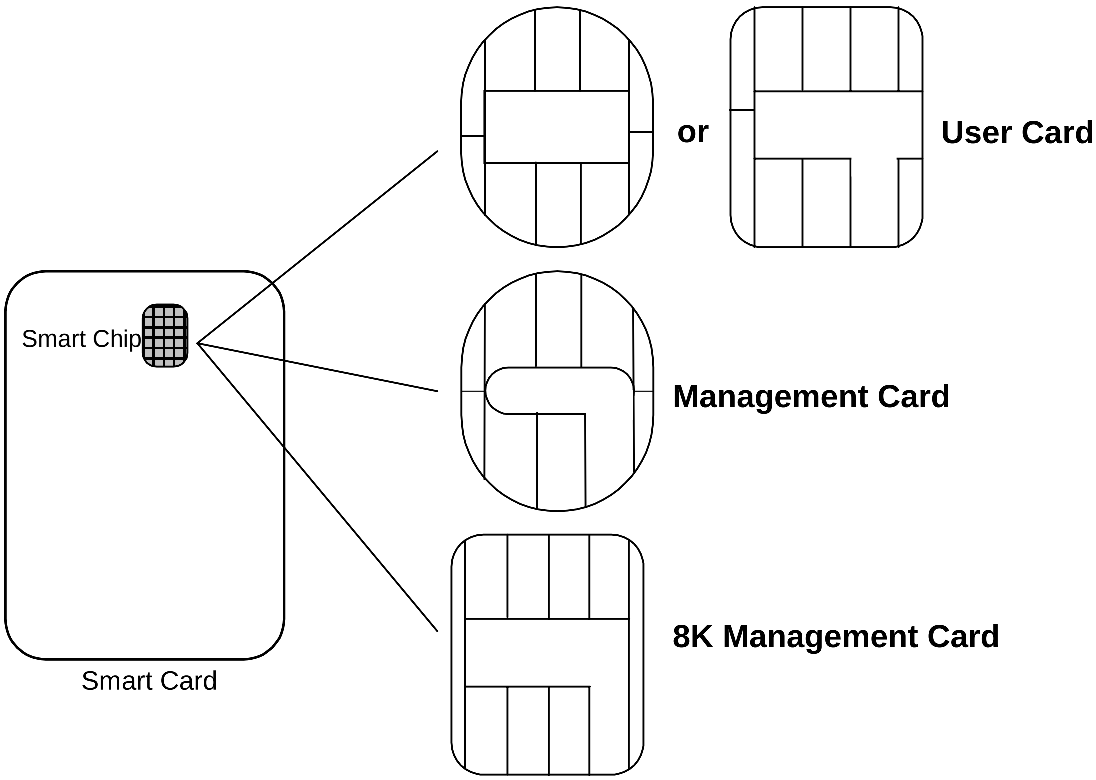

Figure 2.24 Visually Identifying Smart Cards

Note:
This is only a visual guideline. The most accurate way to identify a card is with the Identify Card function covered in Section 2.4.3.

2.4.2. Reading and Writing to the Smart Card

When using SMS2, you will need to write (or create) new smart cards or read the data from existing smart cards. This is accomplished through the use of the PC Smart Card Reader. When using the PC Card Reader, insert the card with the chip side facing up and toward the reader.

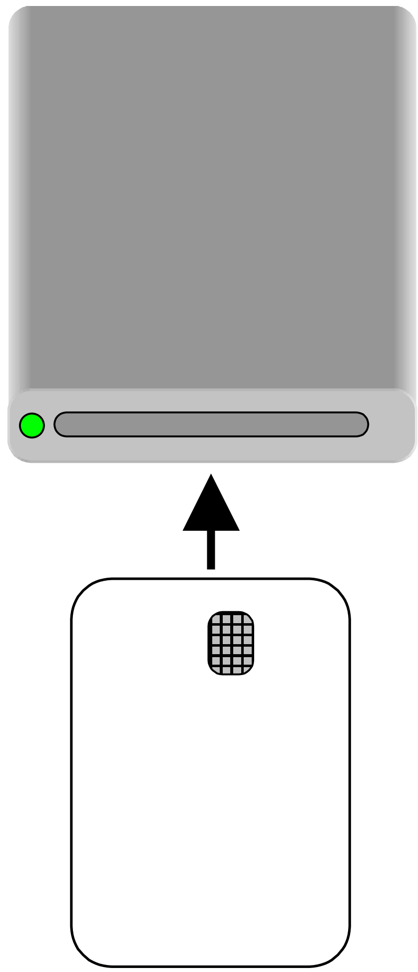

Figure 2.25 Inserting the Smart Card into the PC Reader

2.4.3. Identifying Card Contents

Each card created in the SMS2 software can be audited to identify the card type (Service Card, User Card, etc.). Once the card type is determined, it can be examined from the manager in which it was created and further details can be viewed.

2.4.3.1. Identifying a Card

1. Insert the Card into the PC Reader (Section 2.4.2).
2. Select Identify Card from the Help drop-down menu on the main screen (Figure 2.26).

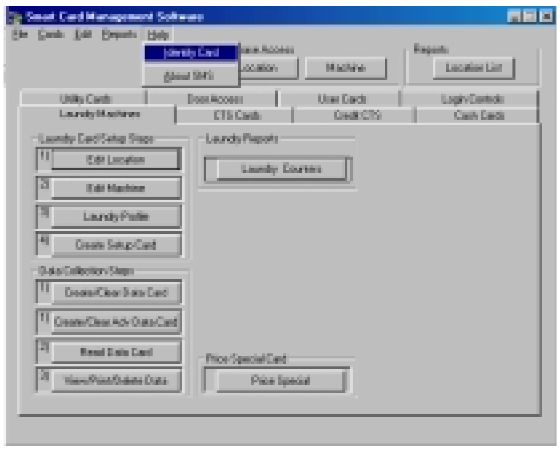

Figure 2.26 Identifying a Card

3. A window containing the card information will appear (Figure 2.27).

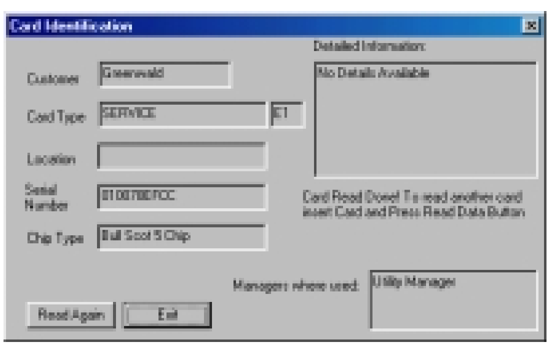

Figure 2.27 Card Identification Window

4. Click the Exit button when finished, or insert a different card into the PC Reader and click the Read Again button (Figure 2.27).

GUIDED TOUR

3

3.1.1. Overview

In this chapter, a guided tour will introduce the steps involved in the software setup of a laundry facility. This section is recommended only for previous SMS users and seasoned PC users who want to get a feel for the new SMS2 interface structure. Only brief explanations of different screens and functions will be provided. Please refer to the appropriate chapters for further details.

3.1.2. The Scenario

For this exercise, we will set up two separate laundry facilities. Both facilities have identical equipment. Each laundry room is equipped with:

- 1 Cash Transaction Station
- 5 Whirlpool EMS2000 Washers
- 5 Maytag PD Dryers

Although the equipment is identical, the vend cost for each location differs as shown in Table 3.1.

Table 3.1 Pricing by Property Name

	Huntington Woods	Lake View
CTS Card Deposit	$3.00	$4.50
Washer	$1.30	$1.75
Dryer	$1.00	$1.15

Because of the difference in price and the close vicinity of these two properties, we will restrict tenants to using only the equipment in their building.

3.2. Setting Up the Databases

The first step in setting-up the system is to configure the different databases necessary to run the equipment in our scenario. The databases that need to be set up are associated with the following managers (or software modules):

- Locations Manager
- Machines Manager
- CTS Cards Manager
- Laundry Machines Manager

The following sections will cover the setup process in each one of these SMS2 Managers.

3.2.1. Locations

1. After logging on to SMS2 (Section 2.2.5), click **Locations** in the main dialog box (Figure 3.1).

Click here

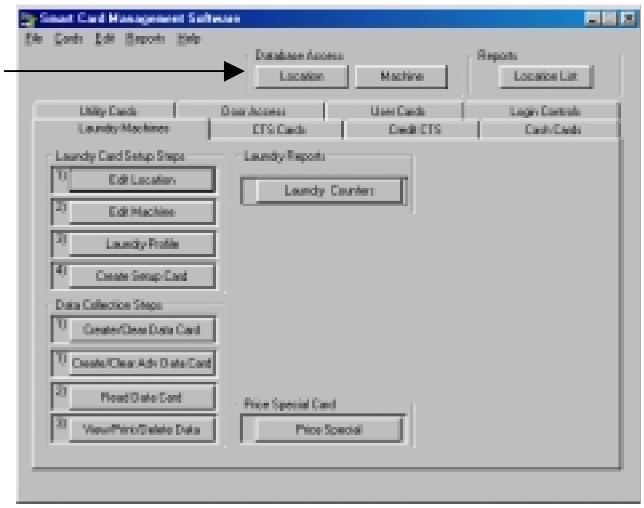

Figure 3.1 Locations

2. The Location Data dialog box will open. Select **Add New Location** from the Edit drop-down menu (Figure 3.2).

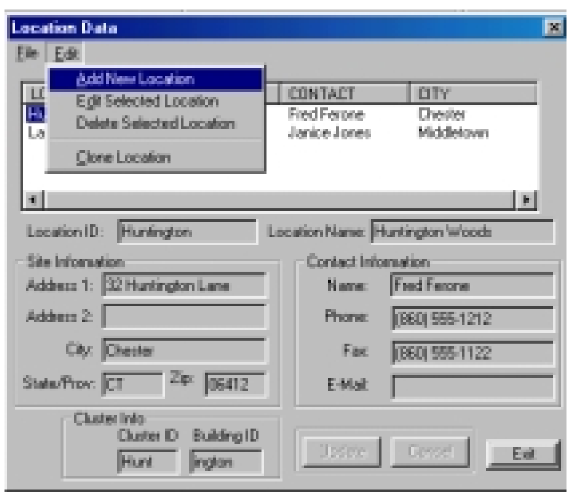

Figure 3.2 Add Location

3. A blank Location record will appear. Enter the information from Table 3.2 into the appropriate fields.

Table 3.2 Huntington Woods Location Setup

Field Name	Information to Enter
Location ID	Huntington
Location Name	Huntington Woods
Address 1	32 Huntington Lane
Address 2	
City	Chester
State/Prov	CT
Zip	06412
Name	Fred Ferone
Phone	(860) 555-1212
Fax	(860) 555-1122
E-Mail	fferone@Hwoods.com

4. Once all information has been entered correctly, click **Update** to save the information into the database (Figure 3.3).

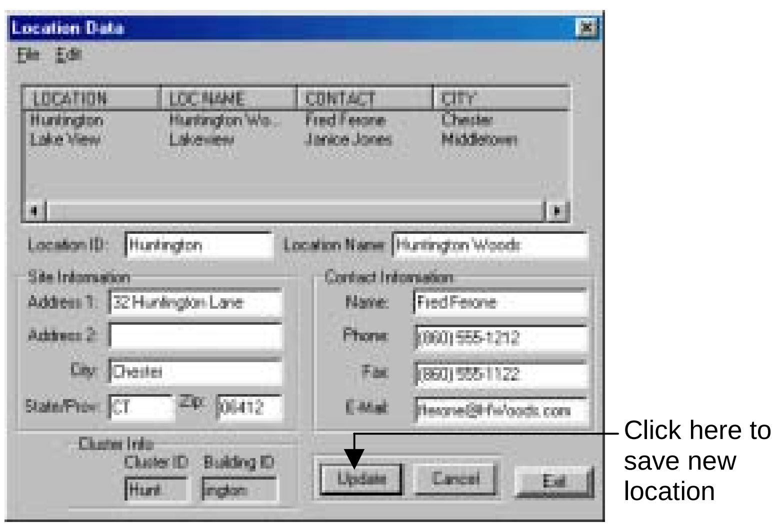

Figure 3.3 Saving New Location

5. Repeat steps 2 through 4 to enter the data for Lake View. Use the information in Table 3.3 to enter the correct data for each field in the **Location Data** dialog box

Table 3.3 Lake View Location Setup

Field Name	Information to Enter
Location ID	Lake View
Location Name	Lake View
Address 1	1050 Buena Vista Drive
Address 2	P.O. Box 2400
City	Middletown
State/Prov	CT
Zip	06400
Name	Janice Jones
Phone	(860) 555-1212
Fax	(860) 555-1122
E-Mail	jjones@lakeview.com

6. When completed, the Location List Window in the Location Data dialog box should include the two properties (Figure 3.4).

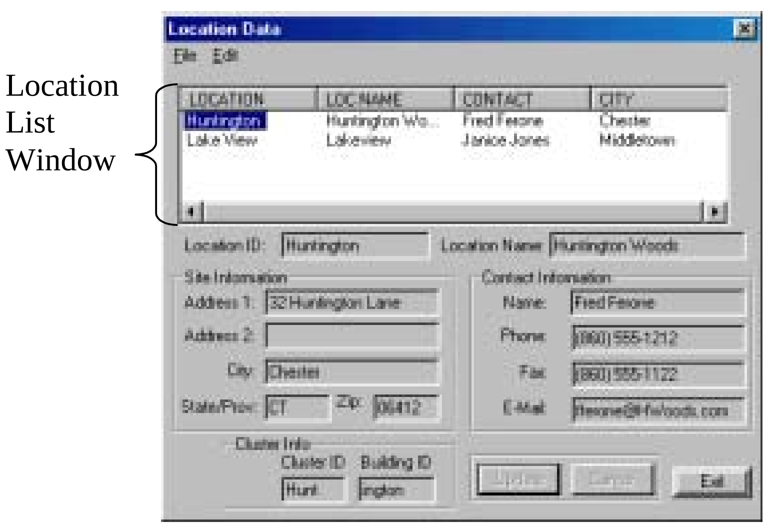

Figure 3.4 Completed Location Setup

7. Close the Location Data window by clicking the Exit button.

3.2.2. Machines

After the Locations have been entered, the next step is to set up the Machine Database.

1. Click **Machine** in the main dialog box (Figure 3.5).

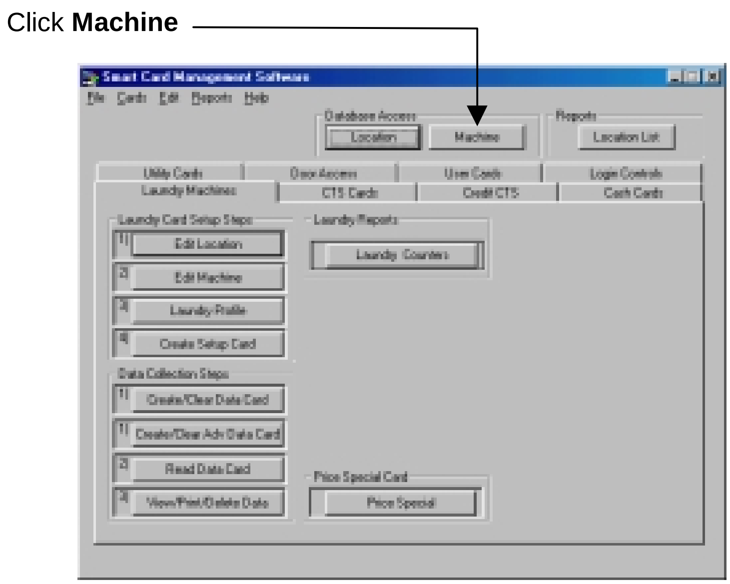

Figure 3.5 Opening the Machine Manager

2. In the Machine Manager dialog box, select **Add New Machine** from the Edit drop-down menu (Figure 3.6).

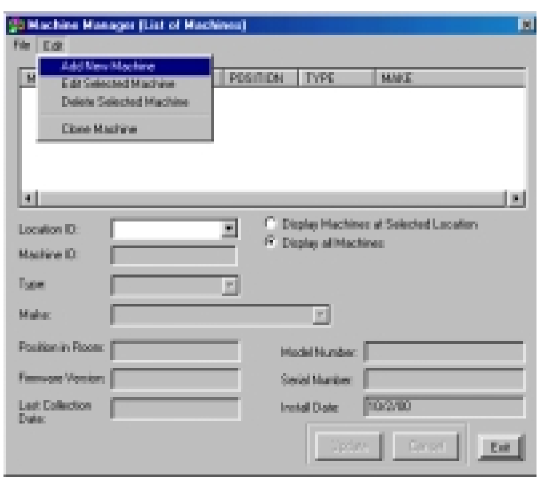

Figure 3.6 Adding a New Machine

3. A blank Machine record will appear. Enter the information in Table 3.4 into the appropriate fields to set up the Cash CTS for Huntington Woods.

Table 3.4 Huntington Woods Cash CTS Machine Setup

Field Name	Information to Enter
Location ID	Huntington
Machine ID	CTS001
Type	CTS
Make	Intellicard CTS Cash
Position in Room	Front
Firmware Version	2.15
Model Number	5101-AVSD-F
Serial Number	01234560001

Note:

The software automatically updates the **Last Collection Date** field. In the **Install Date** field enter the date installation will occur on, otherwise it will defaults to the current date.

4. Once all information has been entered correctly, click **Update** to store the information into the database (Figure 3.7).

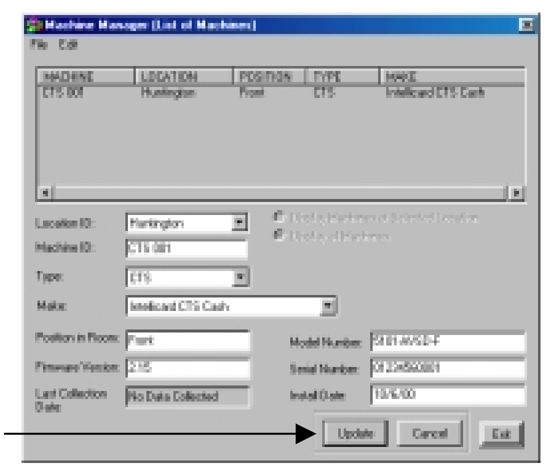

Figure 3.7 Saving Machine Information

5. Repeat steps 2 through 4 to set up the Cash CTS for the Lake View property. Use Table 3.5 to enter the correct data for each field in the Machine Manager (List of Machines) dialog box.

Table 3.5 Lakeview Cash CTS Machine Setup

Field Name	Information to Enter
Location ID	Lake View
Machine ID	CTS002
Type	CTS
Make	Intellicard CTS Cash
Position in Room	Front
Firmware Version	2.15
Model Number	5101-AVSD-F
Serial Number	01234560002

6. Next, add two more records to set up the dryers and washers for Huntington Woods. Repeat steps 2 through 4 using the information in Table 3.6 to enter the correct data.

Table 3.6 Huntington Woods Machine Setup

Field Name	Washer Setup	Dryer Setup
Location ID	Huntington	Huntington
Machine ID	WPL-W 001	MPD-D 001
Type	Washer	Dryer
Make	Whirlpool EMS 2000	Maytag Retrofit
Position in Room	Multiple	Multiple
Firmware Version	2.36	3.15
Model Number	EMS 2000	Maytag PD
Serial Number	N/A	N/A

7. Finally, set up the washer and dryer for the Lake View property. Repeat steps 2 through 4 using the information in Table 3.7 to enter the correct data.

Table 3.7 Lake View Machine Setup

Field Name	Washer Setup	Dryer Setup
Location ID	Lakeview	Lakeview
Machine ID	WPL-W 002	MPD-D 002
Type	Washer	Dryer
Make	Whirlpool EMS 2000	Maytag Retrofit
Position in Room	Multiple	Multiple
Firmware Version	2.36	3.15
Model Number	EMS 2000	Maytag PD
Serial Number	N/A	N/A

8. When completed, check to verify that the Machine List Window in the Machine Manager (List of Machines) dialog box includes the 6 machines entered in this section (Figure 3.8).

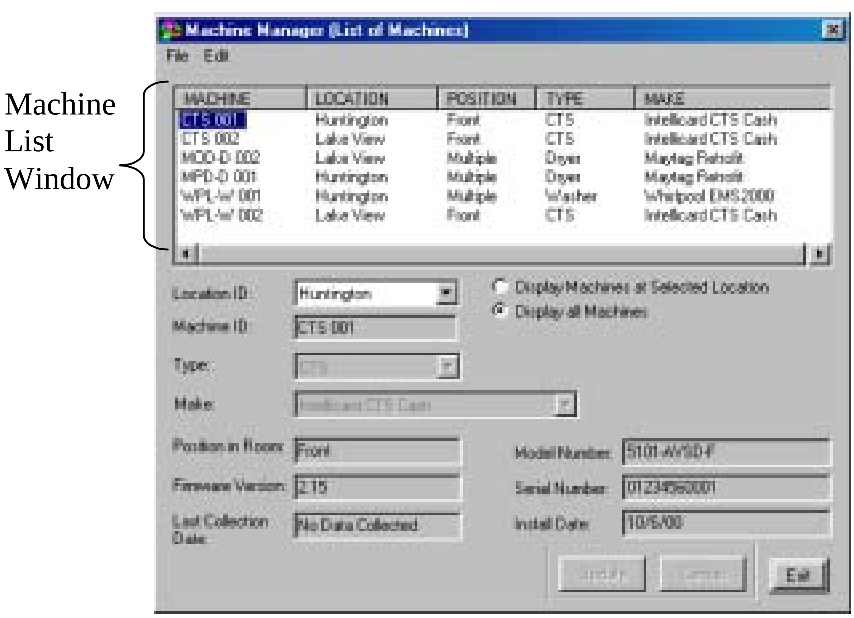

Figure 3.8 Completed Machine Setup

3.2.3. Profiles

Once Locations have been established and all Machine types have been entered, profiles need to be defined before the machines can be programmed. In the profile section of the database, information defining pricing and other functions of the different machines is entered.

3.2.3.1. CTS Profile

Begin by defining the profile for the CTS. Notice that the profiles for the two locations will be similar except for the deposit cost for the card and the CTS cutoff value.

Set up the Huntington Woods CTS Profile with the following steps:

1. Click the **CTS Cards** tab in the main screen (Figure 3.9).
2. Click **CTS Profile** button (Figure 3.9).

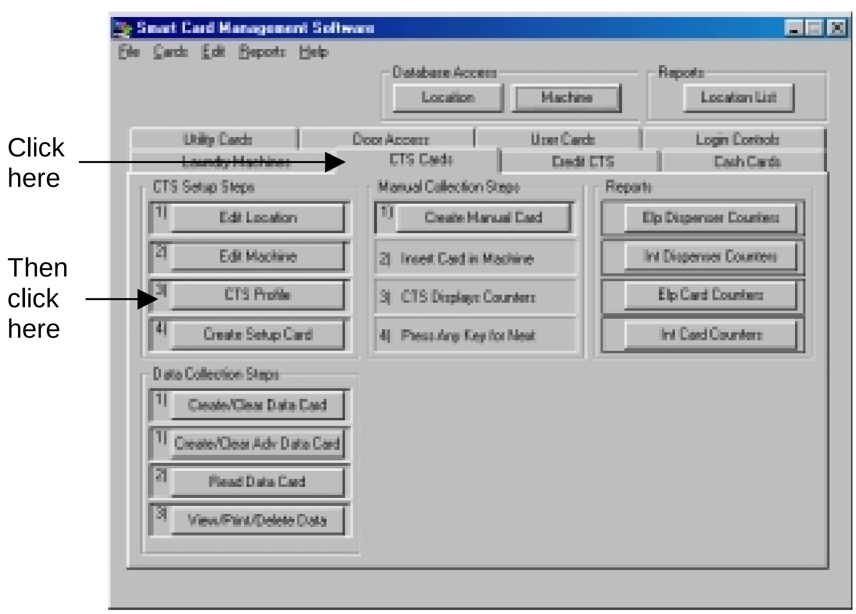

Figure 3.9 Opening the CTS Profile Manager

3. The CTS Profile Manager will open. Select **Add New Profile** from the Edit drop-down menu (Figure 3.10).

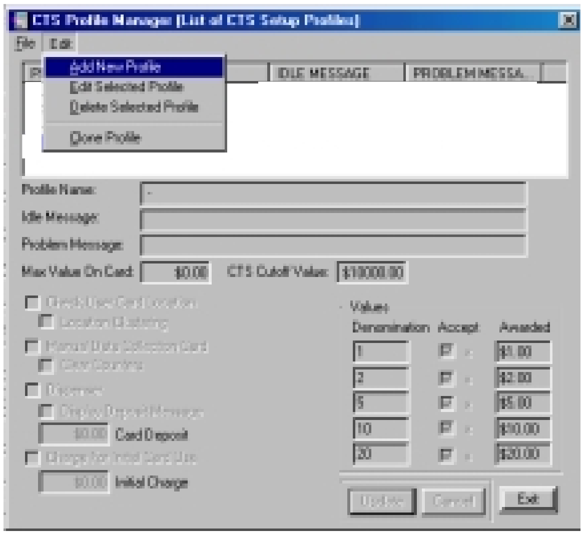

Figure 3.10 Adding a New Profile

4. A blank Profile record will open. Enter the information from Table 3.8 into the appropriate fields.

Table 3.8 Huntington Woods Cash CTS Profile Setup

Field Name	Information to Enter
Profile Name	Huntington CTS
Idle Message	Welcome Tenants
Problem Message	Call 800-555-1212
Max Value on Card	$99.00
CTS Cutoff Value	$4000.00
Check User Card Location	Click on box to enable this feature
Location Clustering	Do not enable this feature
Manual Data Collection Card	Do not enable this feature
Dispenser	Click on box to enable this feature
Display Deposit Message	Click on box to enable this feature
Card Deposit	$3.00
Denomination Accept/Awarded	Click on all boxes other than $2.00 to accept all other bill denominations. Awarded column values should match the Accept column values (see Figure 3.11).

5. Once all information has been entered correctly, click **Update** to store the information into the database (Figure 3.11).

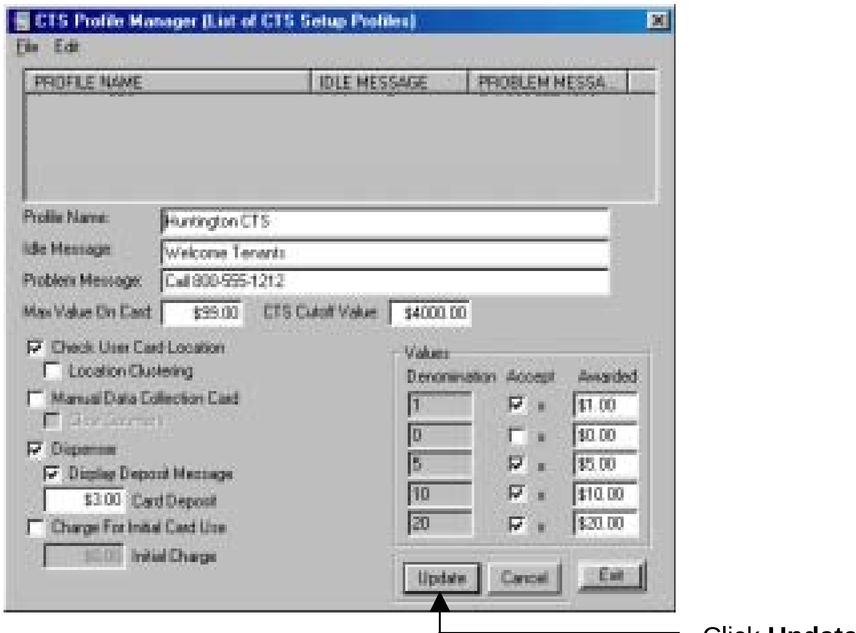

Figure 3.11 Updating the Database

6. Repeat steps 3 through 5 to set up the Cash CTS Profile for the Lake View property. Use Table 3.9 to enter the correct data for each field in the CTS Profile Manager dialog box.

Table 3.9 Huntington Woods Cash CTS Profile Setup

Field Name	Information to Enter
Profile Name	Lake View CTS
Idle Message	Welcome Tenants
Problem Message	Contact Management
Max Value on Card	$99.00
CTS Cutoff Value	$6000.00
Check User Card Location	Click on box to enable this feature
Location Clustering	Do not enable this feature
Manual Data Collection Card	Do not enable this feature
Dispenser	Click on box to enable this feature
Display Deposit Message	Click on box to enable this feature
Card Deposit	$4.50
Denomination Accept/Awarded	Click on all boxes other than $2.00 to accept all bill denominations other than two-dollar bills. Awarded column values should match the Accept column values (see figure 3.11 above).

7. When completed, check to verify that the CTS Profile List Window in the CTS Profile Manager dialog box includes both profile setups covered in this section.
8. Close the CTS Profile Manager by clicking the Exit button.

3.2.3.2. Washer and Dryer Profiles

Set up the washer profile for Huntington Woods as follows:

1. Click the **Laundry Machines** tab in the main screen (Figure 3.12).
2. Click the **Laundry Profile** button (Figure 3.12).

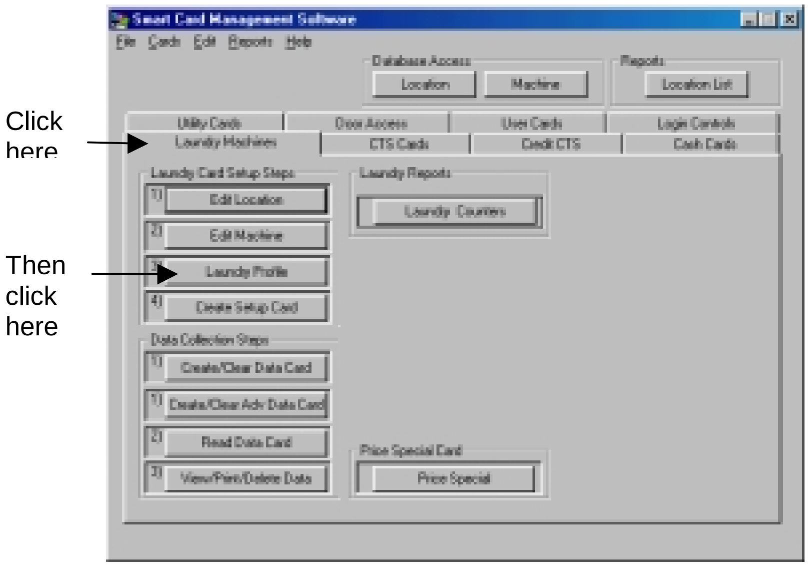

Figure 3.12 Opening the Laundry Profile Manager

3. The Laundry Profile Manager will open. Select **Add New Profile** from the Edit drop-down menu (Figure 3.13)

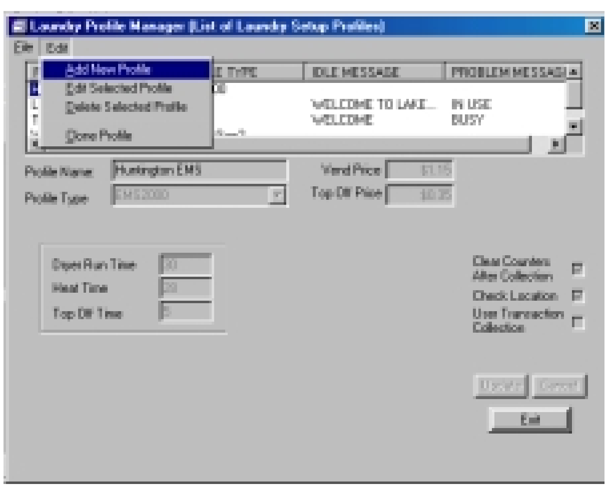

Figure 3.13 Adding a New Laundry Profile

4. A blank profile record will open. Enter the information from Table 3.10 into the appropriate fields.

Table 3.10 Huntington Woods Washer Setup

Field Name	Information to Enter
Profile Name	Huntington Washer
Profile Type	Select “EMS 2000”
Vend Price	$1.30
Top Off Price	Not Applicable
Dryer Options	Not Applicable
Clear Counters After Collection	Click on box to enable this feature
Check Location	Click on box to enable this feature
User Transaction Collection	Do not enable this feature

5. Once all information has been entered correctly, click **Update** to store information into the database (Figure 3.14).

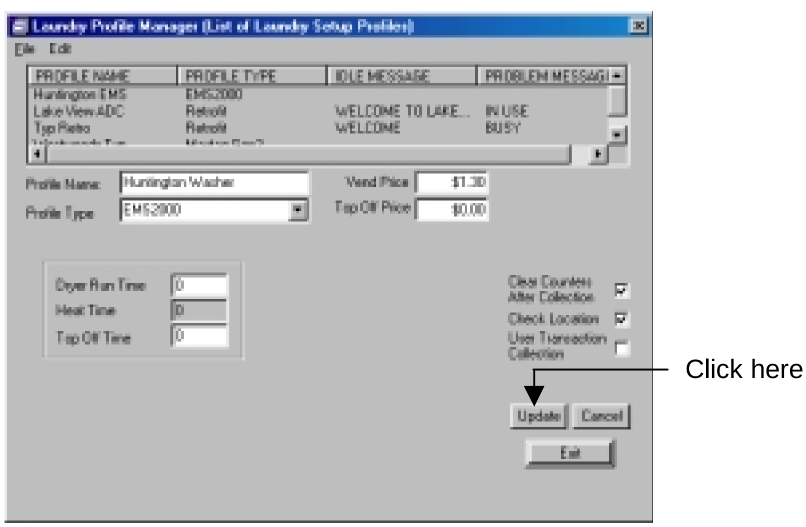

Figure 3.14 Updating the Database

6. Repeat steps 3 through 5 to set up the Washer profile for the Lake View property. Use Table 3.11to enter the correct data for each field in the Laundry Machine manager.

Table 3.11 Lake View Washer Setup

Field Name	Information to Enter
Profile Name	Lake View Washer
Profile Type	Select “EMS 2000”
Vend Price	$1.75
Top Off Price	Not Applicable
Dryer Options	Not Applicable
Clear Counters After Collection	Click on box to enable this feature
Check Location	Click on box to enable this feature
User Transaction Collection	Do not enable this feature

7. To set up the dryers for the two properties, repeat steps 3 through 5 two more times to set up two profiles with the information from Table 3.12.

Table 3.12 Dryer Setup

Field Name	Huntington	Lakeview
Profile Name	Huntington Dryer	Lake View Dryer
Profile Type	Select “Retrofit”	Select “Retrofit”
Vend Price	$1.00	$1.15
Top Off Price	$.25	$.25
Idle Message	MACHINE READY	MACHINE READY
Busy Message	MACHINE IN USE	MACHINE IN USE
Scroll Speed Value	80	80
Number of Pulses	4*	4*
Display Idle Message	Click on box to enable this feature	Click on box to enable this feature
Display Price When Idle	Click on box to enable this feature	Click on box to enable this feature
Cash Deduction	Select “Immediate”	Select “Immediate”
Clear Counters After Collection	Click on box to enable this feature	Click on box to enable this feature
Check Location	Click on box to enable this feature	Click on box to enable this feature
User Transaction Collection	Do not enable this feature	Do not enable this feature

***Note:**

When setting Number of Pulses field to 4, be sure to set the Maytag PD dryer for a four coin cycle startup.

8. When completed, check to verify that the Laundry Profile List Window includes all four laundry profiles created (Figure 3.15).

Profile List WiNdow

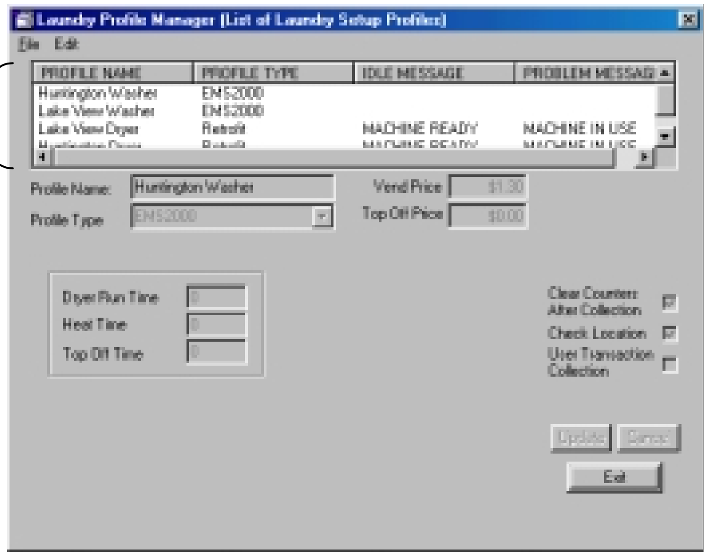

Figure 3.15 Completing the Laundry Profiles

9. Close the Laundry Profile Manager window by clicking the Exit button.

3.3. Creating Setup Cards

Now that the database has been set up with all the necessary information about our locations, the machines that will be used in them, and the profiles of how these machines are to operate, the only step remaining to begin operation is to program the machines.

To program the machines setup cards must be created.

3.3.1. Creating a CTS Setup Card

1. Click the **CTS Cards** tab in the main screen (Figure 3.16).
2. Click the **Create Setup Card** button.

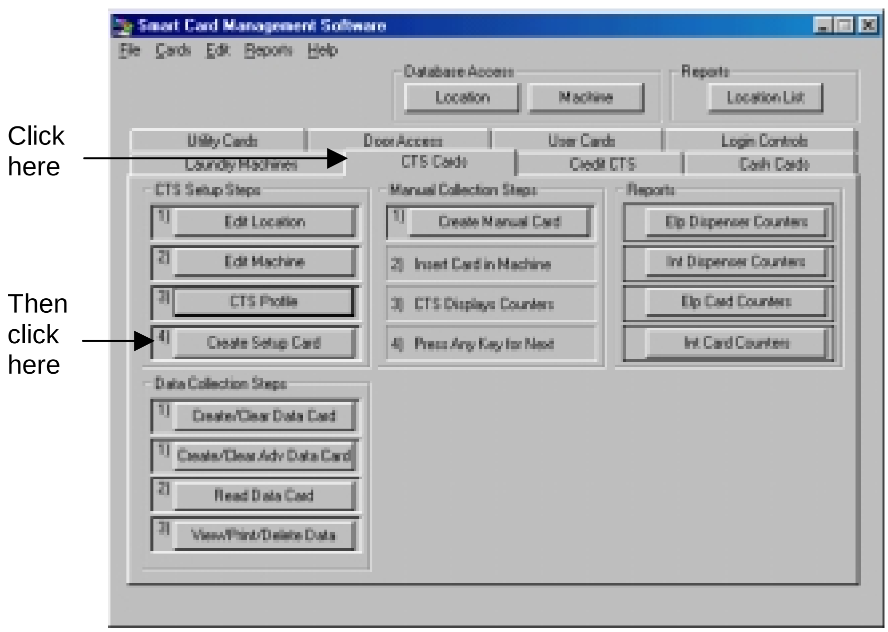

Figure 3.16 Creating a CTS Setup Card

3. In the Create CTS Setup Card window click on machine to setup (Figure 3.17).

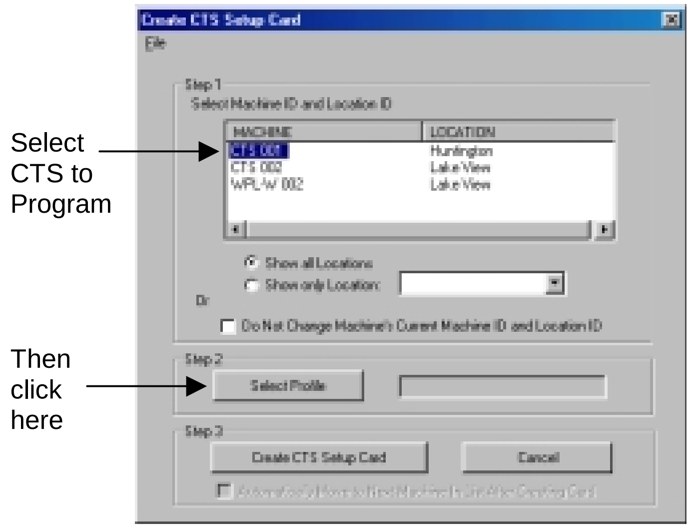

Figure 3.17 Select CTS to Program

4. Click the **Select Profile** button (Figure 3.17). Select the profile for the CTS that is being programmed, and click the **Select** button (Figure 3.18).

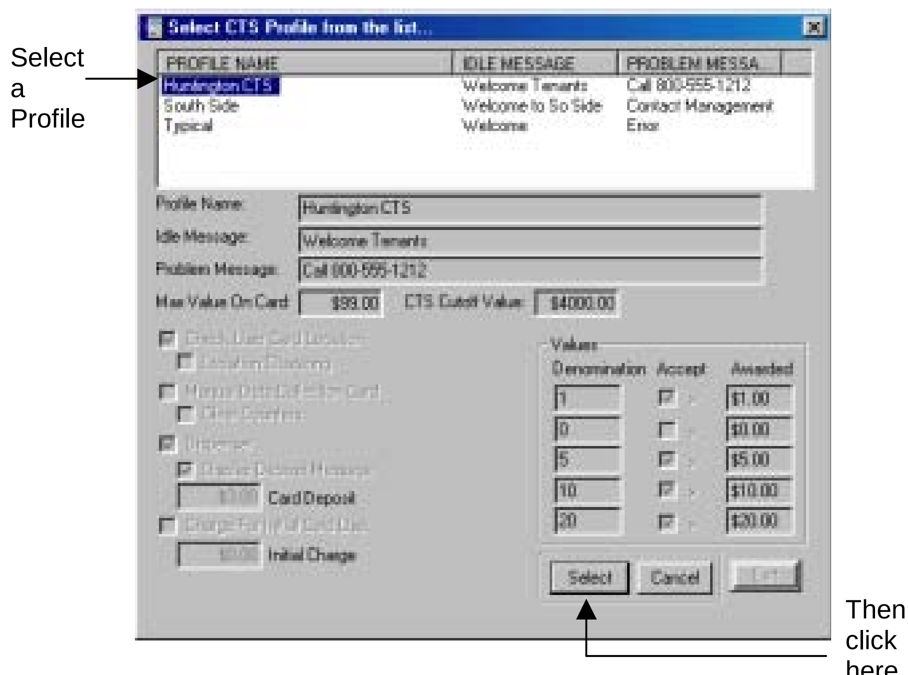

Figure 3.18 Select Profile

5. Insert a Management Card into the PC Card Reader (Figure 3.19).

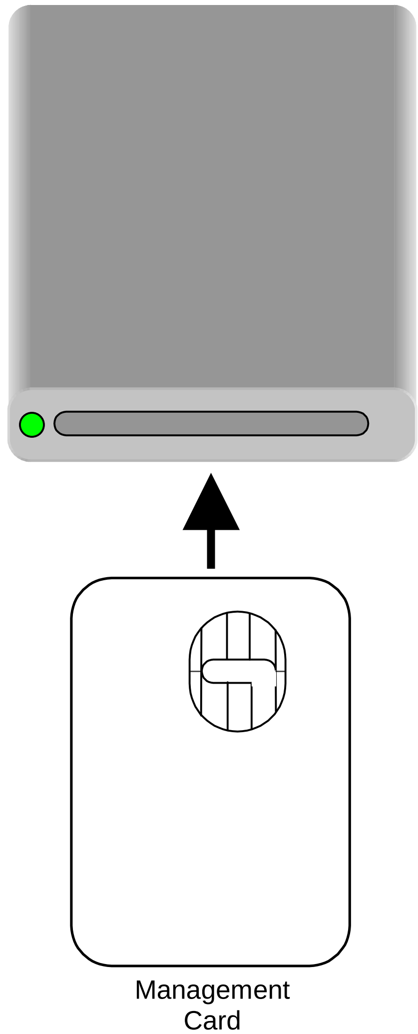

Figure 3.19 Inserting a Management Card into the PC Reader

6. Click the **Create CTS Setup Card** button (Figure 3.20).

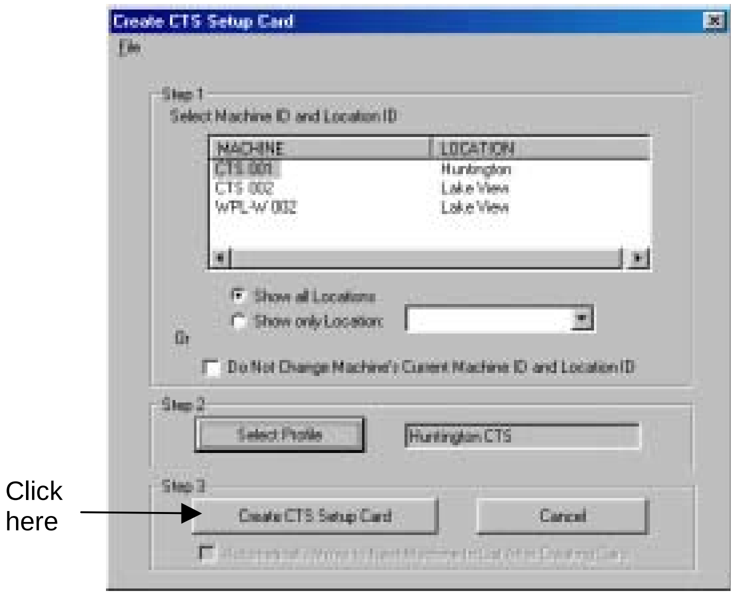

Figure 3.20 Creating the CTS Setup Card

7. The CTS Setup Card has now been created and can be used to program your Card Transaction Station.
8. Close the Create CTS Setup Card window by clicking the Cancel button.

3.3.2. Creating a Laundry Setup Card

1. Click the **Laundry Machines** tab in the main screen (Figure 3.21).
2. Click the **Create Setup Card** button (Figure 3.21).

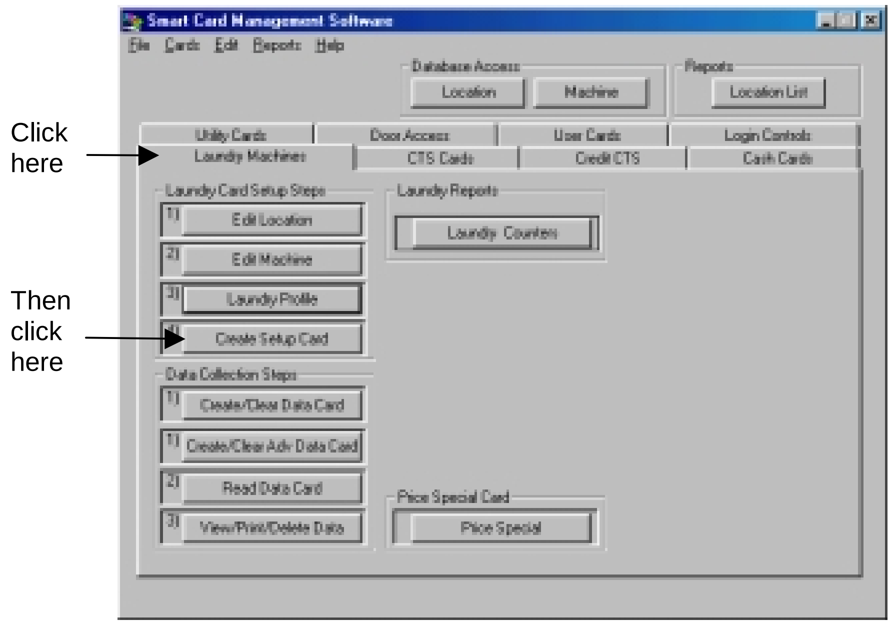

Figure 3.21 Creating a Laundry Setup Card

3. In the Create Laundry Setup Card window click on the machine to set up (Figure 3.22).

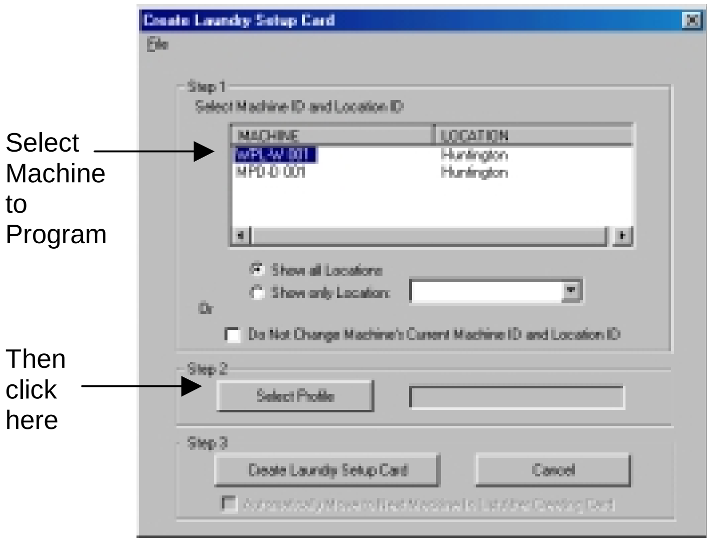

Figure 3.22 Selecting a Laundry Machine to Program

4. Click the Select Profile button (Figure 3.22). Select the profile for the Laundry Machine that is being programmed, and click the **Select** button (Figure 3.23).

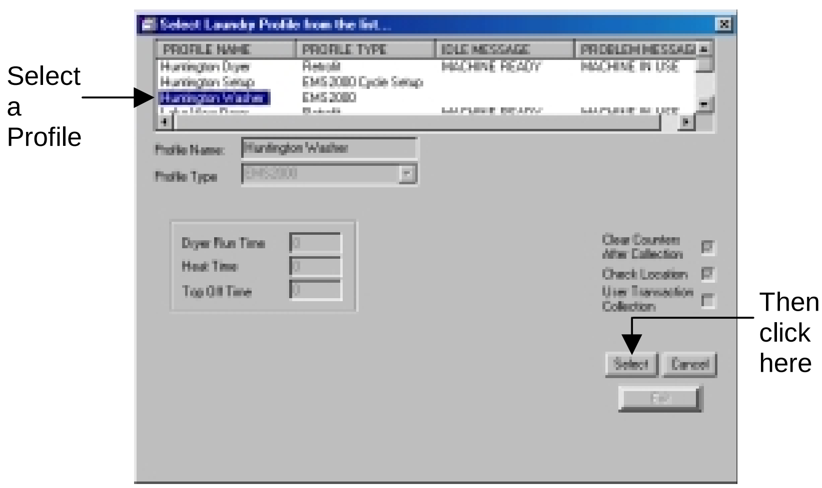

Figure 3.23 Selecting a Profile

5. Insert a Management Card into the PC Card Reader (Figure 3.24).

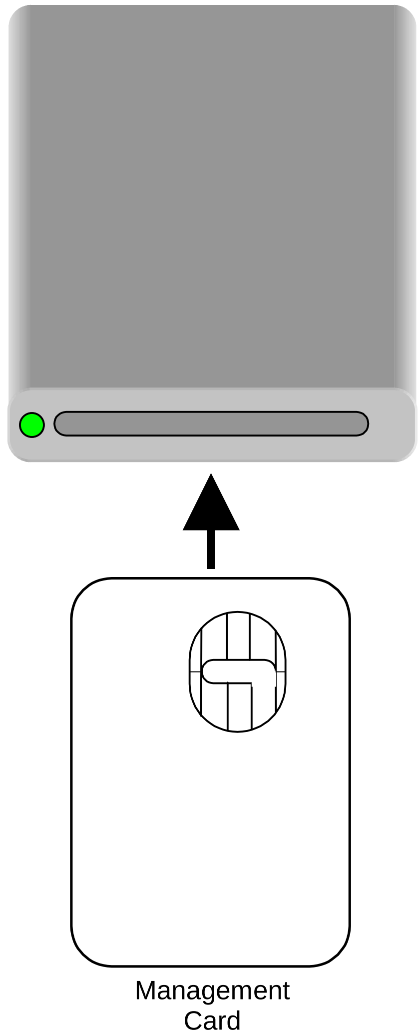

Figure 3.24 Inserting a Management Card into the PC Reader

6. Click the **Create Laundry Setup Card** button (Figure 3.25).

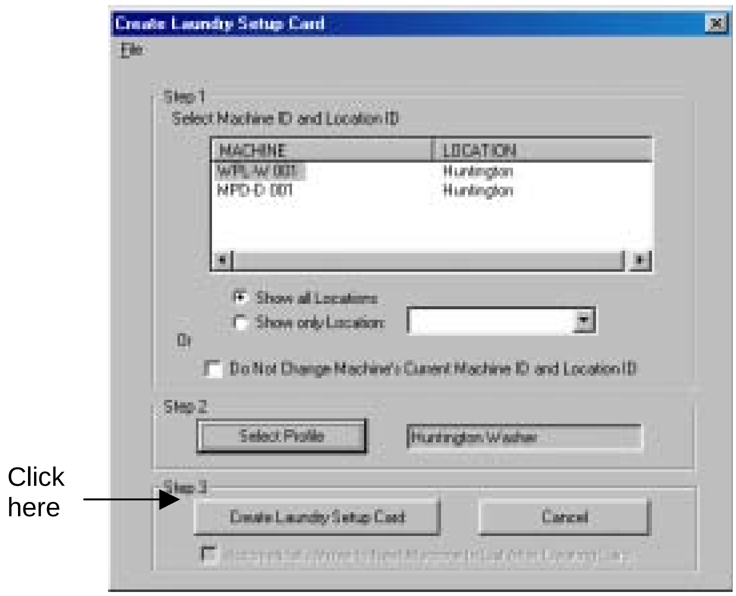

Figure 3.25 Creating the Laundry Setup Card

7. The Laundry Setup Card has now been created and can be used to program your laundry machine.

LOGIN CONTROLS

4

4.1.1. Overview

SMS2 has been designed to support a multi-user environment. The Login Controls Manager allows the system administrator to control access to SMS2.

4.1.2. Description

Access privilege to SMS2 carries great responsibility. Depending upon the managers installed, users can have access to:

- All financial records and usage reports stored in the software.
- All data collected from the various laundry machines, Card Transaction Stations and Door Access Units including collection records, usage and service reports.
- Creating valued cash cards.
- Complete control of the Door Access system.

With this understanding, it becomes very clear that an advanced systematic method to control and restrict access to the software is necessary.

4.1.3. How Does it Work?

All software access and security functions are handled in the Login Controls Manager. There are two Login categories defined by SMS2, they are System Administrator and System User.

- A System Administrator is a user of SMS2 that has unrestricted privileges to the entire SMS2 software package, including the ability to create additional System Users and System Administrators.
- A System User is a user of SMS2 that has privileges and restrictions as set by the System Administrator. System Users cannot create other System Users.

SMS2 requires two credentials for identification verification:

- A Login Card is issued, usually at the time of user creation, and is required upon login to the system.
- A PIN (Personal Identification Number) is also assigned to each system user and administrator for increased security. Should the card be lost or misplaced, it would be useless without the correct PIN.

Note:

Each user and administrator must have their own card and Personal Identification Number.

4.1.4. Login Control Interface

The Login Control Interface is comprised of five sections (Figure 4.1):

1. The User List Window is a listing of all system users in the database, including system administrators. The User Record Window lists and sorts by the following user information:
   - Last Name
   - First Name
   - Apartment Number
   - Building Number

2. The User Information section holds the personal information relating to each user.
3. The Privileges section is a series of tabs and check boxes that define each user's software privileges and restrictions.
4. The Card Information section shows the serial number of the card that is associated with each user in the database.
5. The command buttons located on the bottom right of the Login Controls interface allow for quick and easy use of common functions used in the Login Control Manager.

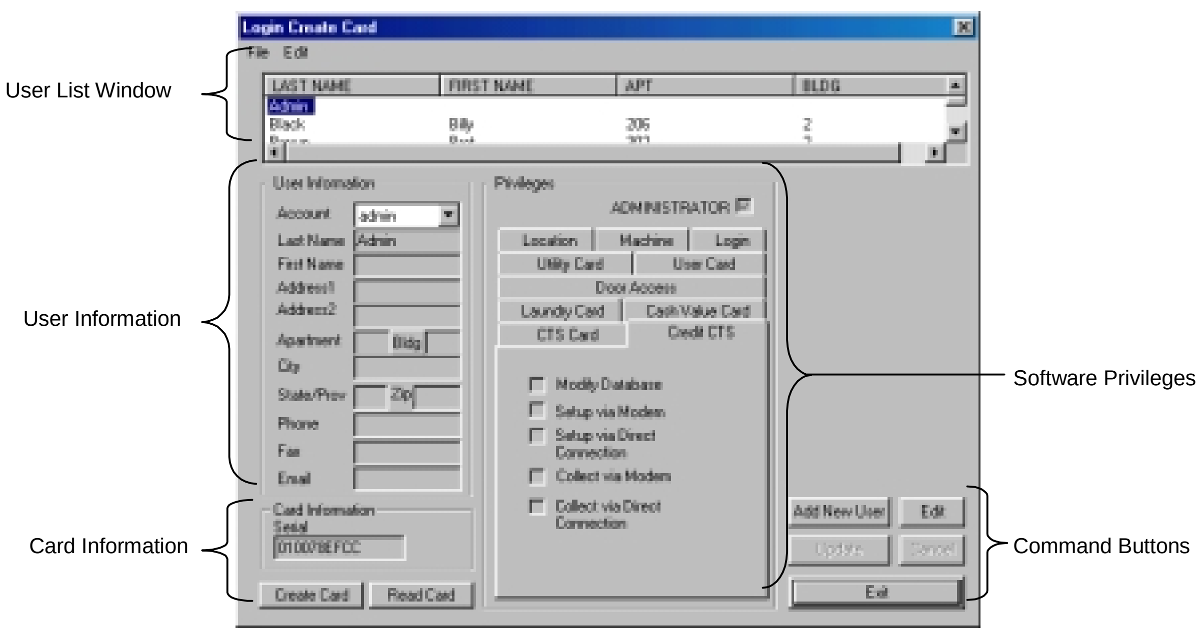

Figure 4.1 Login Controls Manager Main Interface

4.1.4.1. User Information

The User Information identifies each user who will have access to the database. The only required field is the Account field, which must be a unique alphanumeric identification that allows the software to differentiate between each user. Optional fields have been added to incorporate additional information for each user. This is especially helpful for system administrators managing large numbers of system users.

Table 4.1 describes each field in the User Information section of the Login Manager, explains its significance and identifies field restrictions such as maximum character information.

Table 4.1 User Information Fields

Field Name	Description	Restrictions
Account	Required field for creating a unique user identity. This identification will be used by the software in reports, card creation, etc.	Any alphanumeric combination up to ten characters in length
Last Name	Last Name of user	Up to 32 characters
First Name	First name of user	Up to 32 characters
Address1	Address of user	Up to 32 characters
Address2	Address of user	Up to 32 characters
Apartment	Apartment number of user	Up to 16 characters
Bldg	Building number of user	Up to 16 characters
City	City of user	Up to 32 characters
State/Prov	State or Province of user	Up to 16 characters
Zip	Postal code of user	Up to 16 characters
Phone	Phone number for user	Up to 16 characters
Fax	Fax number for user	Up to 16 characters
Email	Email address for user	Up to 32 characters

Once again, SMS2 uses only the Account field to identify system users. All other fields are kept in the database only for convenience in managing large numbers of users.

Tech Tip:

A system administrator can decide to store other information than what is currently listed in the User Information section. For example, if the Email field is not being used, an employee's badge number can be entered instead.

4.1.4.2. Privileges

The system administrator sets privileges for each user during the Login User Setup process by checking the box for those areas or functions of the software to which the new user will have access. Areas to which the user is restricted are simply not checked. A user's privileges can always be edited or access can be denied at any time.

Warning!

Even though access privileges can be modified at any time, it is very important to understand the implication of each SMS2 privilege before assigning it to a user. Certain privileges obtained by the wrong person can create irreversible consequences or security issues that are difficult to correct. Table 4.2 explains each privilege in greater detail.

Table 4.2 describes each privilege controlled by the Login Controls Manager:

Table 4.2 Privilege Description

Privilege	Description
	Location Manager
Add/Edit Location	Allows users to add new locations and edit or delete existing locations. This privilege allows access to the location database, which can affect all other parts of the software. Only top-level administrators should have access to this privilege. Locations are typically predetermined by the top-level administrators and affect other SMS2 managers so caution should be used when assigning this privilege.

continued on next page

Table 4.2 continued

Machines Manager	
Add/Edit Machine	The machine database manages information of Laundry Machine Readers and Card Transaction Stations. This privilege allows a user to add, delete and edit machines in the system. The information controlled by this manager allows the machines to function properly. Altering machine information will have a direct effect on report generation. Adding new machines is done during the setup process of a property, or when adding additional equipment to a site.
Login Manager	
Change PIN	**Caution should be used when assigning any of the Login Control privileges**. The Change PIN function allows a user to change either their own or a different user's Personal Identification Number. This could potentially allow someone to get "locked out" of the system. However, in order to change a PIN, it is required to know the current PIN for a user and have their login card.
Create Login Card	This feature allows a user to create a new login card, or recreate a login card if one is lost. Caution should be taken because a user can purposely or inadvertently recreate a user card, potentially locking another user out of the system.
Modify Login Privileges	Modifying login privileges should be left only to top-level administrators since a user would be able to assign themselves any privileges they desire if they have access to this privilege.
Utility Card Manager	
Create Service Card	Service cards are used to initiate a service routine in the different machines supported by the software. In some cases, cycles can be stopped and free cycles can be started. The software keeps track of the different service cards that are issued; therefore it is advisable that managers overseeing service personnel create service cards.
Create Time Card	A time card is used to set the date and time on a machine. Date and time entries affect report generation and price specials (see Chapter 13).
Create Manual Clock Card	A Manual Time card is used to set the date and time on a machine. Date and time entries affect report generation and price specials (see Chapter 13).

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Table 4.2 continued

User Card Manager	
Create Transaction DC	Allows users to create a data collection card used to collect the user transactions from each machine. Once the information is transferred to the card it is no longer stored in the machine.
Read Transaction DC	Allows users to transfer data from the data collection card to a PC and view reports generated from that data.
Edit User Profile	Allows modification of user records, and door access privileges.
Create User Card	Allows the creation of a card for a user that is already in the system.
Read User Card	Allows the reading of user cards and viewing the user information associated with that card.
Door Access Manager	
Create Setup Card	Allows creation of a Door Access Reader setup card. All access privileges are based on the reader identification and setup.
Create User Card	Allows user to create a card for a user that is already in the system.
Create Master Key	Allows user to create a card that will have access to all door access readers in the system.
Edit User List	Allows editing of user’s lists that have privileges to a specified Door Access Unit.
Create User List Setup Card	Allows creation of cards used to program/reprogram door access unit with a new list of access privileges.
Create Data Collection Card	Allows user to create a card for collecting transaction data from the door access reader. Once data is collected, it needs to be transferred to the software.
Read Data Collection Card	Allows user to transfer transaction information from data collection card into the software and to view transaction reports.
Read User Card	Allows the reading of user cards and viewing the user information associated with that card.
Laundry Card Manager	
Create Setup Card	Allows user to create a setup card that programs Laundry Machine Readers with the data from the software. The user has the ability to select any profile in the database to use when creating the setup card.
Edit Profile	Allows editing of Laundry Profiles that contain pricing information as well as location restrictions, display specifications and other machine function information. Users who are not allowed to change machine pricing and cycle durations should not be assigned this privilege.
Read Data Collection Card	Grants user the ability to transfer data from a data collection card. Once the information is downloaded, it can be viewed in various reports.
Create Data Collection Card	This privilege allows a user to create a data collection card. Once the data is collected from a Laundry Machine Reader, it should be transferred to SMS2

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Table 4.2 continued

Cash Value Card Manager	
Create Cash Card	Allows a system user to create a card to be used for storing monetary value.
Add Value	Allows the system user to add value to a cash card. The value added is deducted from the PC balance, an "electronic cash register," and the transaction is recorded in an audit report.
Subtract Value	Subtracting value from a card is also tracked, and the value deducted is added to the PC balance.
Read Cash Card	The Read Cash Card feature enables a user to determine the cash value of a Cash Card.
Edit PC Balance	The PC Balance is an "electronic cash register" where the PC cash is stored. This limits the amount of cash that a user can put on a card without the PC being recharged. This feature allows a user to recharge the PC.
Edit Maximum Value	This privilege allows a user to define the maximum monetary value that a cash card can hold.
CTS Card Manager	
Create Setup Card	Allows user to create a setup card that programs the Card Transaction Station with the data from the software. The user has the ability to select any profile in the database to use when creating the setup card.
Edit Profile	Allows editing of Cash Transaction Station profiles containing location restrictions, display specifications, bills accepted and card deposit cost. Users who are not allowed to change the Cash Transaction Station options should not be assigned this privilege
Create Data Collection Card	This privilege allows a user to create a data collection card. Once the data is collected from a Card Transaction Station, it should be transferred to a PC.
Read Data Collection Card	Allows user the ability to transfer the stored data from a data collection card into the software. Once the information is transferred, it can be viewed in various reports.
Credit CTS Manager	
Modify Database	Allows editing of the Credit CTS database. Allows user to create or edit the Credit CTS profiles and setups.
Setup Via Modem	Allows user to set up the Credit CTS utilizing a PC modem and phone line.
Setup Via Direct Connection	Allows user to set up the Credit CTS utilizing a direct serial connection.
Collect Via Modem	Allows user to collect data from the Credit CTS utilizing a PC modem and phone line.
Collect Via Direct Connection	Allows user to collect from the Credit CTS utilizing a direct serial connection

4.1.5. Working with Login Control Records

4.1.5.1. Adding a User

1. Click the Login Controls tab (Figure 4.2).
2. Click the Create Login Card button (Figure 4.2).

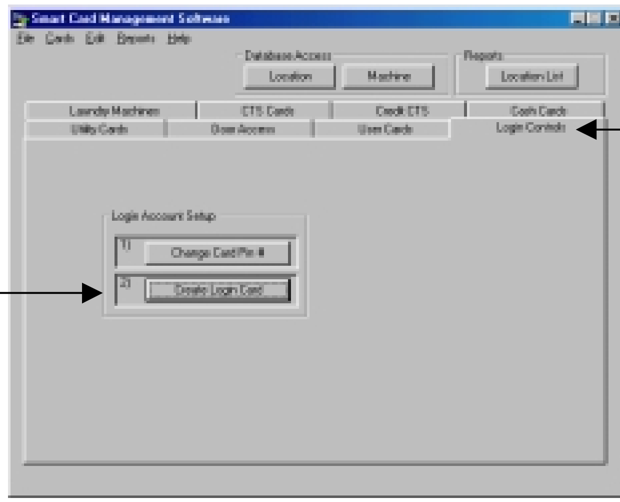


Figure 4.2 Opening a Login Create Card Window

3. Click the Add New User button (Figure 4.3).

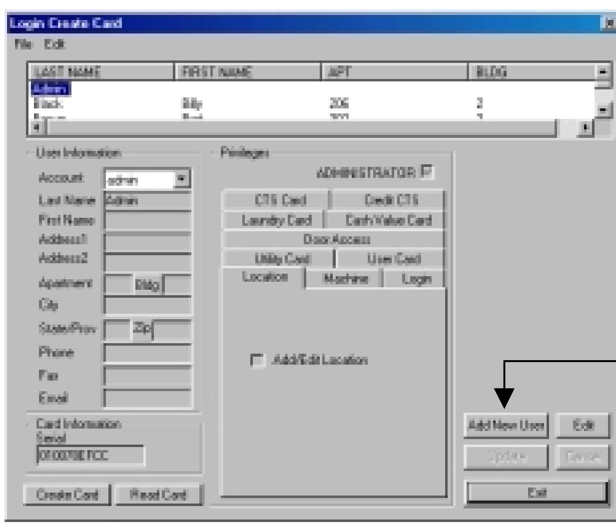


Figure 4.3 Adding a New User

4. Enter all needed user information.

Note:
While most fields in the User Information record are optional, the Account field is a required field. A unique alphanumeric account number or name up to 10 characters in length must be entered.

5. Check all software privileges to be associated with this user (see table 4.2 for further details).
6. After verifying that all user information and software privileges have been entered correctly, click the Update button (Figure 4.4).

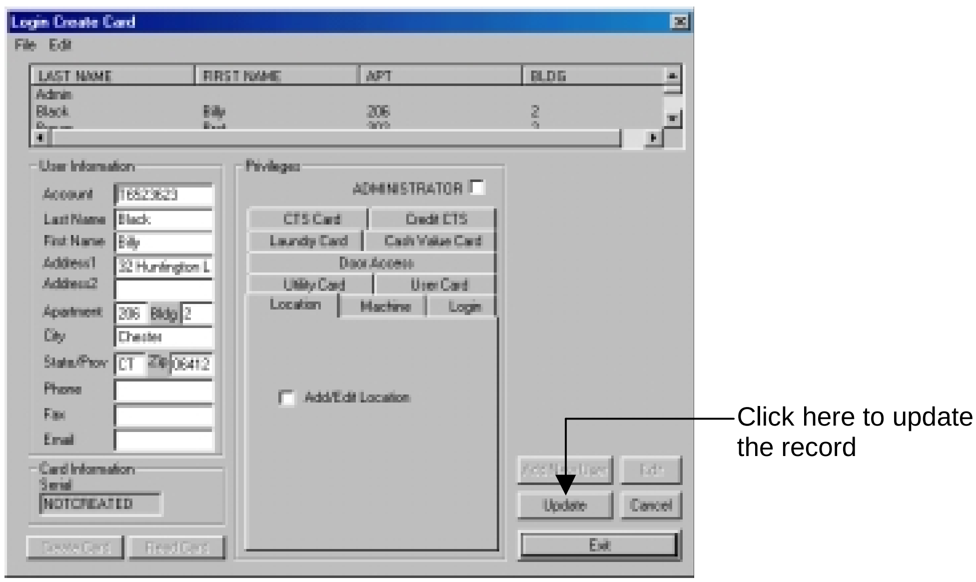


Figure 4.4 Saving Login User into the Database

7. Follow the steps in Section 4.1.5.2 to create a Login Card.

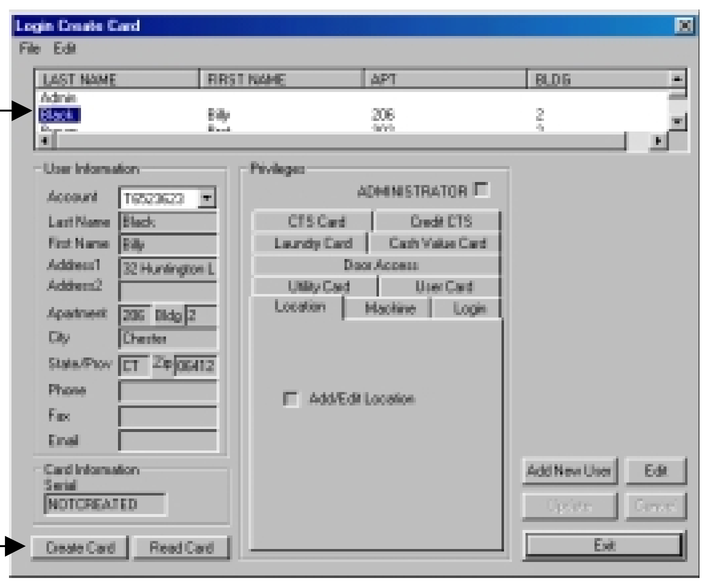
4.1.5.2. Creating a Login Card with a PIN (Personal Identification Number)

Note:

If a card has been previously issued to the user you must first reset the user’s card serial number (Section 4.1.5.8)

1. Once a user is in the system, a login card can be created. In the Login Controls tab, click the Create Login Card button (Figure 4.2).
2. In the User List Window, select the user to create a card for (Figure 4.5).
3. Insert a Smart Card into the PC smart card reader and click the Create Card button (Section 2.4.2).

Select user to create card for



Click here after inserting smart card into the PC Reader

Figure 4.5 Creating a Login Card

4. A PIN Entry dialog box will appear. Enter a 4-digit numeric PIN to be associated with that card, and reenter the numbers in the Confirm PIN Number field. Click Ok (Figure 4.6).

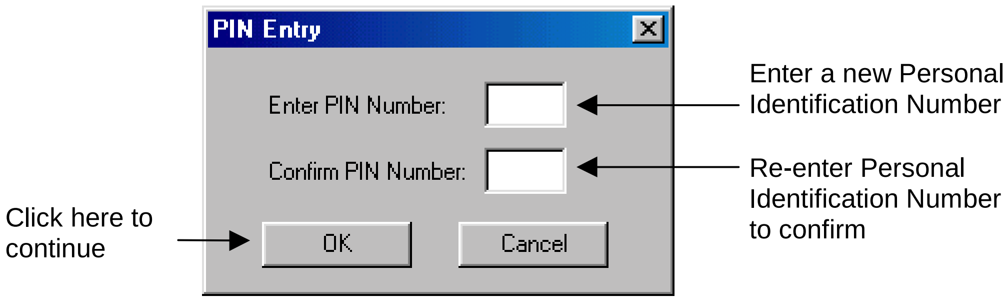


Figure 4.6 PIN Entry Window

5. A Login Card Created message appears, click Ok to complete card creation (Figure 4.7).

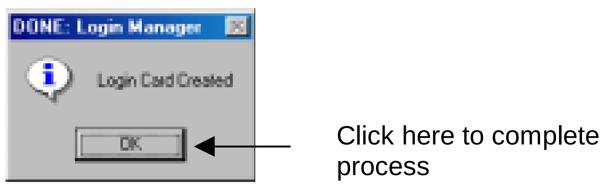


Figure 4.7 Login Card Created

4.1.5.3. Changing the PIN for an Existing Login Card

1. In the Login Controls tab, click the Change Card PIN # button (Figure 4.8).

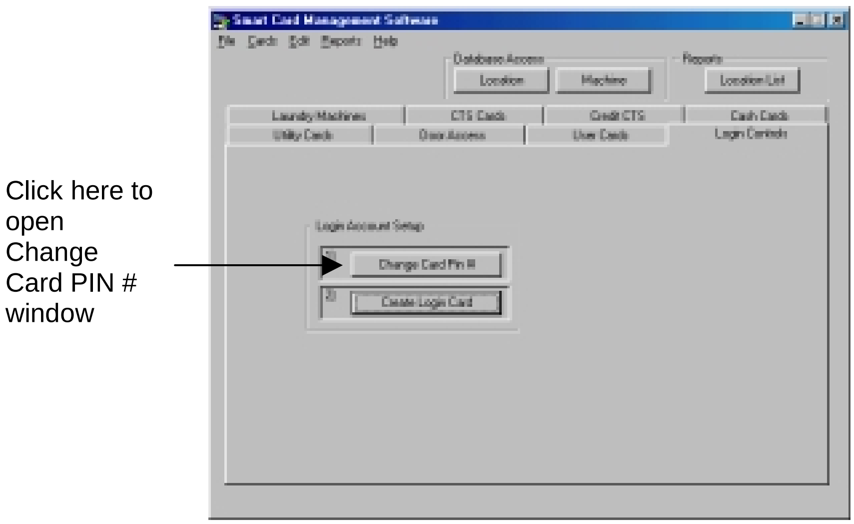


Figure 4.8 Opening the Change Card PIN # Window

2. In the first field enter the current PIN (Figure 4.9).
3. In the middle and bottom fields, enter and confirm the new PIN (Figure 4.9).
4. Click the Change PIN Button (Figure 4.9).

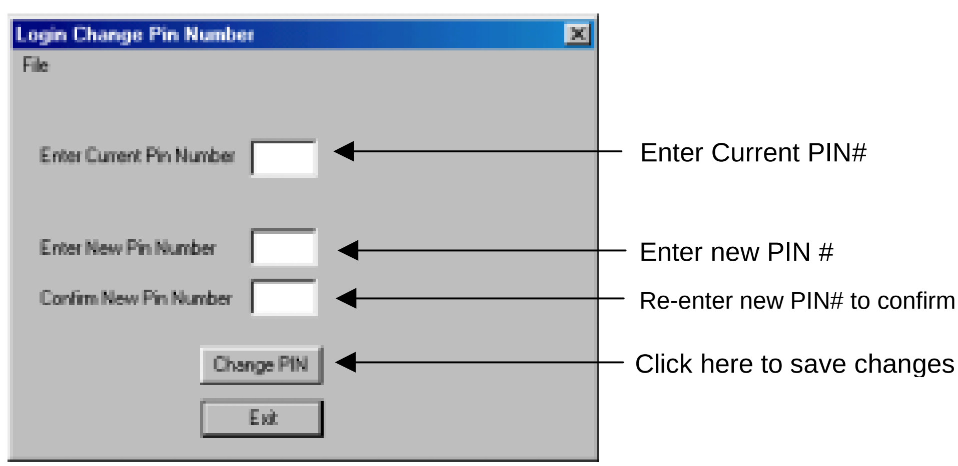


Figure 4.9 Changing a PIN Number

5. A Login Card PIN Changed message will appear, click Ok.

4.1.5.4. Editing a User Record

Note:
Once an account is assigned to a user, it is permanent! Editing a user record will only alter privileges for the selected user.

1. In the Login Controls tab, click the Create Login Card button (Figure 4.2).
2. Select the user to be edited by clicking on their name in the User List Window (Figure 4.10).
3. Click the Edit button (Figure 4.10).

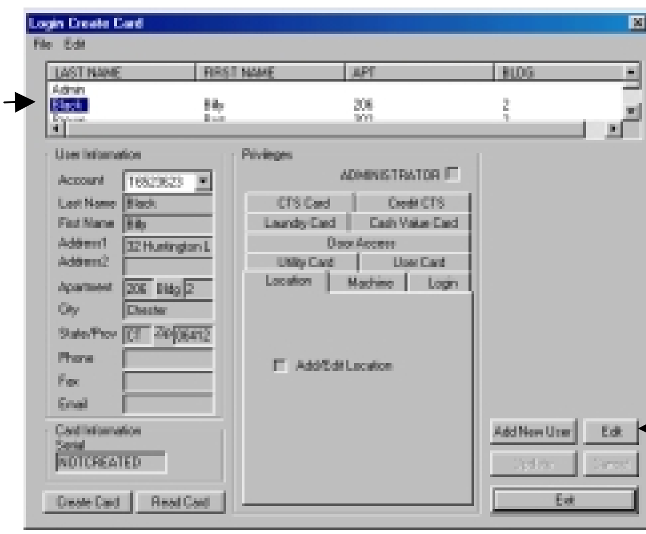


Figure 4.10 Editing Login Users

4. Make any necessary changes.
5. Click the Update button to save your changes (Figure 4.11).

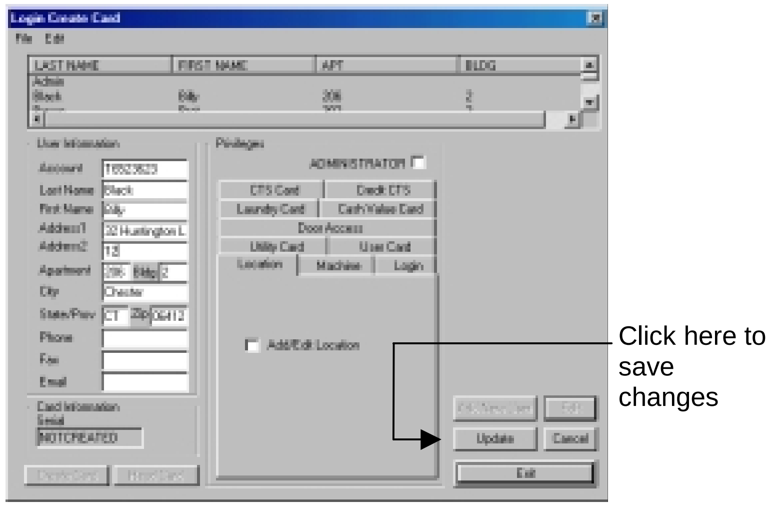


Figure 4.11 Completing Editing Process

4.1.5.5. Deleting a User Record

Warning!

When deleting a User, the database retains the user information for report generation only. A deleted user cannot be recovered.

1. In the Login Controls tab, click the Create Login Card button (Figure 4.2).
2. Select the user to be deleted by clicking on their name in the User List Window (Figure 4.12).

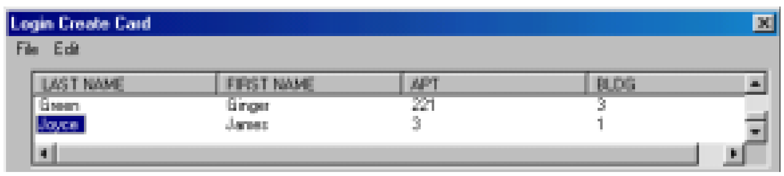


Figure 4.12 Selecting a User to be Deleted

3. Select Delete User from the Edit drop-down menu (Figure 4.13).

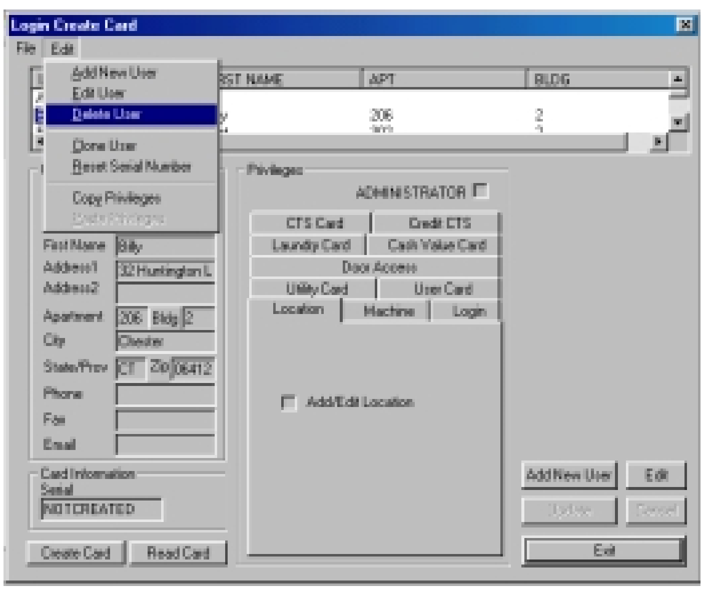


Figure 4.13 Deleting a Login User

4. A confirmation to delete a user will appear. If you wish to proceed, click the Yes button. Click the No button to cancel the operation (Figure 4.14).

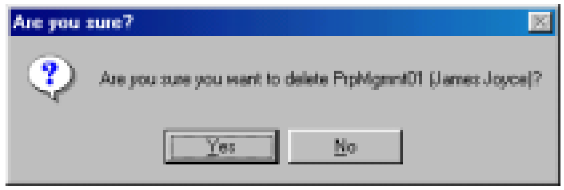


Figure 4.14 Deletion Confirmation

4.1.5.6. Cloning a User

Cloning a user is a timesaving technique used to create multiple users with the same or similar user address and software privileges. When cloning a user all fields except Account, Last Name, and First Name are recreated. To clone a record:

1. In the Login Controls tab, click the Create Login Card button (Figure 4.2).
2. Select the user to be cloned by clicking on their name in the User List Window (Figure 4.15).

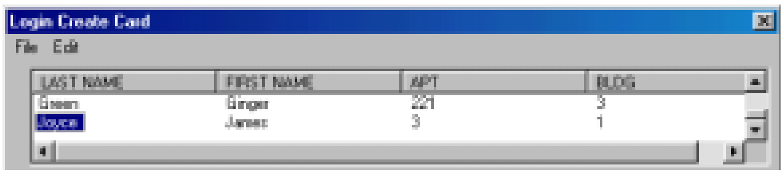


Figure 4.15 Selecting a User to be Cloned

3. Select Clone User from the Edit drop-down menu (Figure 4.16)

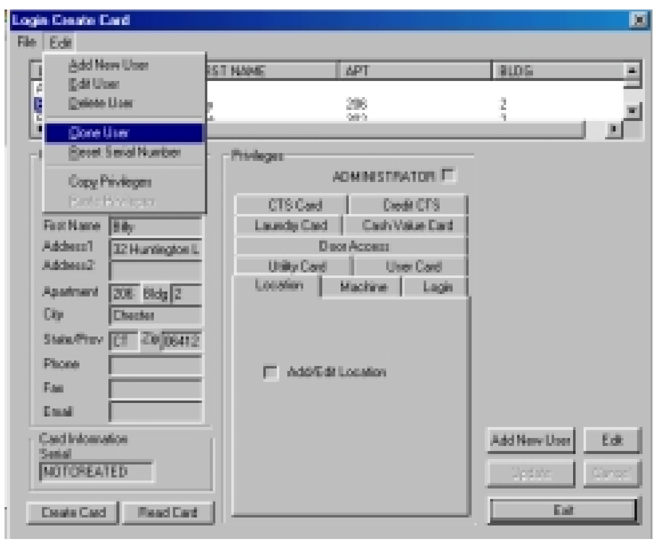


Figure 4.16 Cloning a User

4. Enter a new Account name/number (Figure 4.17).
5. Enter Last and First Name fields (Figure 4.17).
6. Make any other applicable changes.

7. Click the Update button to save the new user to the system (Figure 4.17).

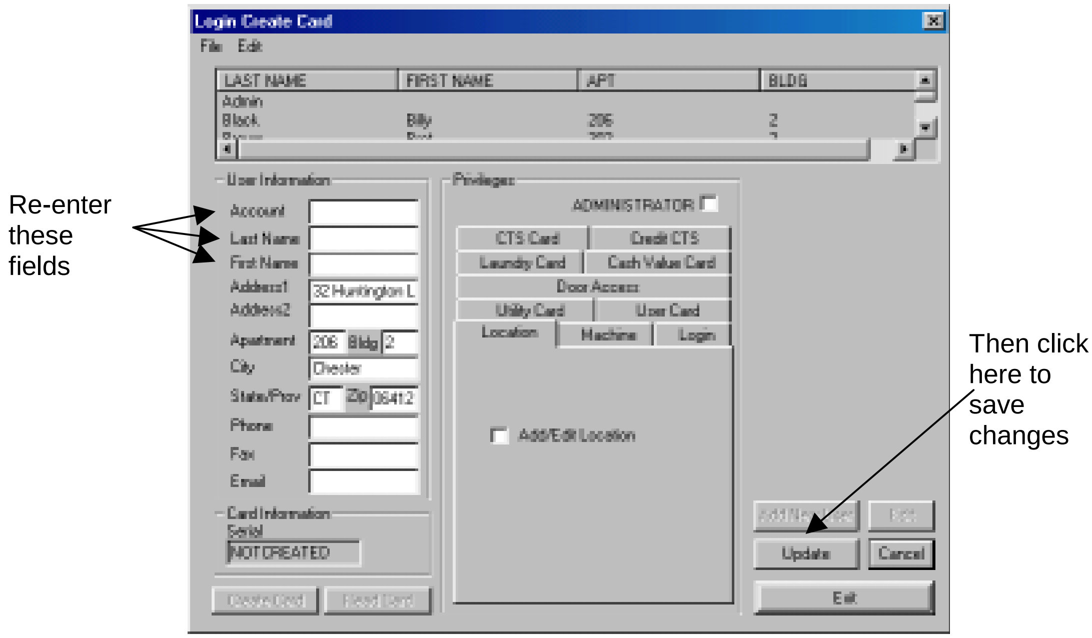


Figure 4.17 Entering a New User

4.1.5.7. Copying User Privileges

You can copy privileges from one user to another. To copy privileges:

1. In the Login Controls tab, click the Create Login Card button (Figure 4.2).
2. In the User List Window select user whose privileges will be copied (Figure 4.18).

Figure 4.18 Selecting a User

3. Select Copy Privileges from the Edit drop-down menu (Figure 4.19).

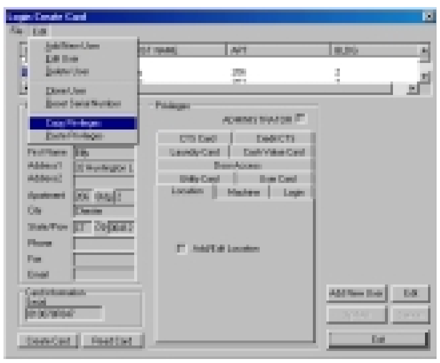


Figure 4.19 Copying Privileges

4. In the User List Window select user to copy privileges to (Figure 4.18).
5. Select Paste Privileges from the Edit drop-down menu (Figure 4.20).

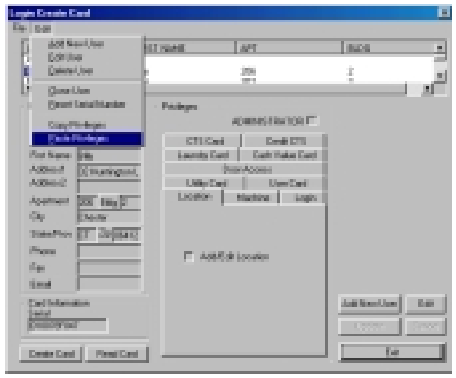


Figure 4.20 Pasting Privileges

5.1.5.8. Resetting a Login Card Serial Number

Warning!

By resetting the serial number of a user, you will lose the link between the user and the card already created for him/her.

If a system user’s Login Card is lost or damaged, reset the user’s card serial number before a new one can be issued.

To reset a user’s Login Card serial number:

1. In the Login Controls tab, click the Create Login Card button (Figure 4.2).
2. In the User List Window select user to reset card serial number for (Figure 4.10).
3. Click the Edit button (Figure 4.10).
4. Select Reset Serial Number from the Edit drop-down menu (Figure 4.21).
5. A warning window will appear, click Yes to continue or No to cancel.
6. Click the Update button.

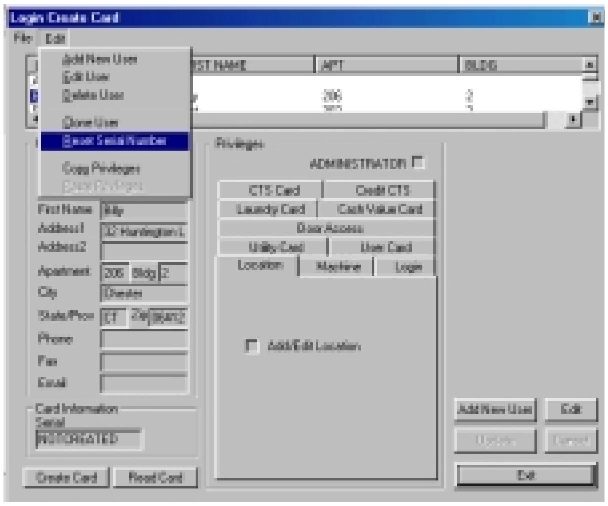


Figure 4.21 Resetting a User’s Card Serial Number

LOCATIONS

5

5.1.1. Overview

Locations are the fundamental building blocks of the SMS2 database. Locations must be defined and entered into the system before any machines can be setup in the software database, or programmed for operation.

Location records can identify individual or groups of facilities for the purpose of usage restriction and more meaningful report generation.

The Locations function offers two useful features to the system operator:

- Locations allow the software to identify and gather data collected from each facility separately, allowing for greater flexibility in report generation. For example, an operator can view total revenue by location rather than the totals for the entire route.
- Utilizing multiple locations allows operators to restrict machine usage and offers greater flexibility in controlling door access. For example, if a route operator manages multiple Laundromats within the same vicinity, utilizing location restrictions prevents a customer from spending their money in one location to buy a Cash Card and then using the card in a different facility to purchase wash and dry cycles.

Note:

Even if SMS2 is being used to manage only one facility, it is still necessary to create at least one location.

5.1.2. Working with Location Records

5.1.2.1 The Interface

The Location Record consists of four basic components (Figure 5.1):

1. The **Location List Window** displays all the Locations entered into the software. The Location ID, Location Name, Contact and the City of the Location are listed for easy identification and sorting.
2. The **Main Body** of the record contains the Location information: Location ID, Location Name, as well as address and contact information. While the Location ID is a required alphanumeric field, all other fields in this part of the record are optional.
3. **Cluster Information** is an advanced location restriction feature of the software. It allows for laundry machine usage restriction by location, while allowing for semi-restricted use of a centrally located Card Transaction Station.
4. **Command buttons** for the most commonly used features have been included for ease of use.

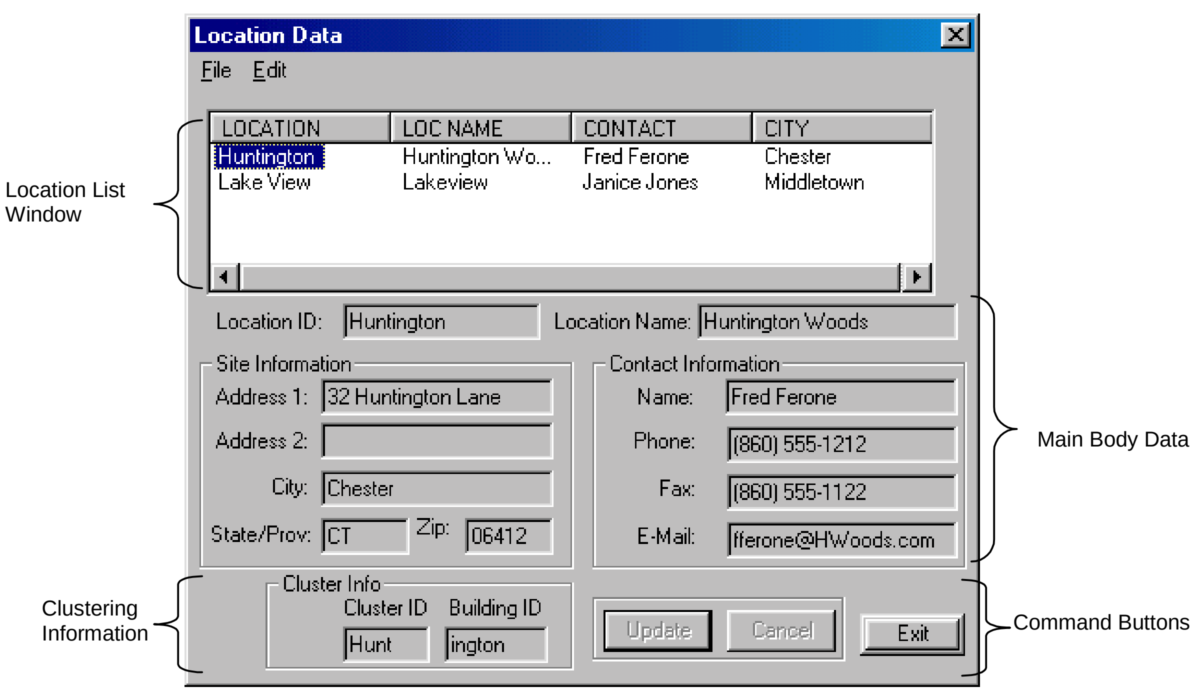


Figure 5.1 Location Data Interface

Table 5.1 describes each field in the Locations Record and identifies the field restrictions.

Table 5.1 Locations Record Fields

Field Name	Description	Restrictions
Location ID	Required unique field containing a case-sensitive identity for the location. This identification is used in reports, machine setup cards and all other functions utilizing Locations.	Any alphanumeric combination up to ten characters in length
Location Name	Name of Location	Up to 32 characters
Address1	Address of Location	Up to 32 characters
Address2	Address of Location	Up to 32 characters
City	City of Location	Up to 16 characters
State/Prov	State or Province of Location	Up to 16 characters
Zip	Postal code of Location	Up to 16 characters
Contact	Name of contact at Location	Up to 32 characters
Phone	Phone number for Location	Up to 16 characters
Fax	Fax number for Location	Up to 16 characters
E-Mail	Email address or the Location contact	Up to 16 characters

The only required field is the Location ID Field. All other fields are optional and are kept in the database for ease of managing large numbers of facilities.

Tech Tip:

A system administrator can decide to store other information than what is currently listed in the Locations database. For example, if the Contact Name is not being used, the name of the service technician who is responsible for this site can be entered instead.

5.1.2.2. Understanding Location Clustering

The clustering feature of the SMS2 allows for more advanced location restrictions in the Card Transaction Station when that option is enabled. This feature was designed to address the needs of those administering large apartment complex facilities.

It allows end-users to purchase cards from a central location, yet limits their use of laundry machines to a single location.

Clustering looks at the first four digits of the location ID as the global identifier and the remainder of the ID field as the unique location restriction.

When utilizing the clustering feature, you must begin all Location ID's for an apartment complex with the same four digits, and continue with unique values for the rest of the field. Table 5.2 is an example of assigning four location ID's with a common clustering ID.

Table 5.2 Locations Clustering Sample

Location	Building Number	Location ID
Lakeview	100	LKVW100
Lakeview	200	LKVW200
Lakeview	300	LKVW300
Lakeview	400	LKVW400

If the location ID's are entered in this fashion, the Card Transaction Stations can be set up to recharge cards of tenants from any of these buildings, yet the laundry machines in building 100, would only be available to those tenants living in that building.

Note:

In order for this clustering sample to work, the CTS Profile would need to have the "clustering" option enabled and would require that the four Location ID's listed in Table 5.2 be used.

5.1.2.3. Opening the Locations Database

There are two ways to open the Locations Database (Figure 5.2):

- Clicking the Locations button in the main SMS2 interface, or
- Clicking the Locations button within the related managers: Laundry Machines, CTS Card, Credit CTS and Door Access Manager.

To open the Locations Database Click the Locations Button Located in the Main Interface, or in related managers.

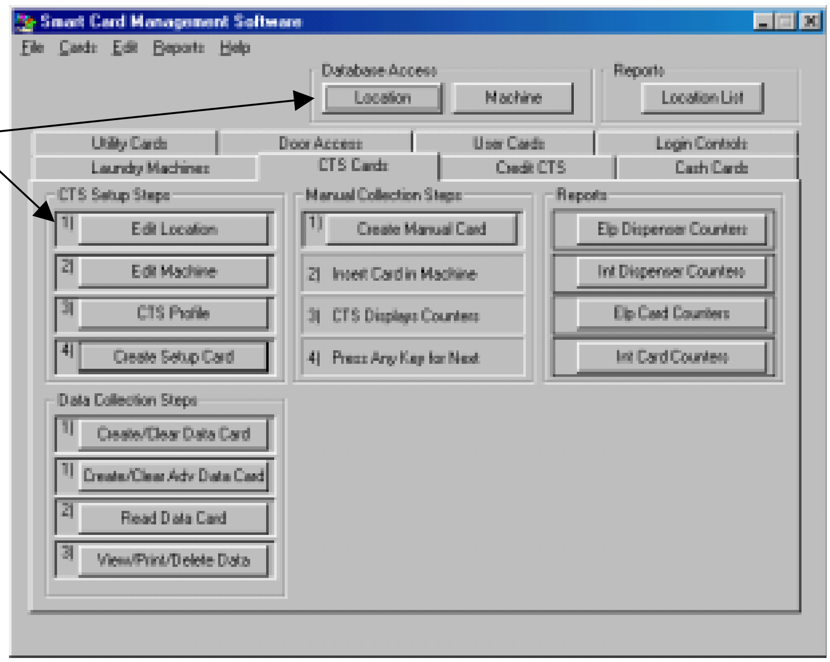


Figure 5.2 Opening the Locations Database

5.1.2.4. Adding a Location

1. Open the Locations Database (Section 5.1.2.3).
2. Select Add New Locations from the Edit drop-down menu (Figure 5.3).
3. Enter data into the appropriate fields (Table 5.1)
4. Verify that the data you have entered is accurate and click the Update button to save (Figure 5.3).

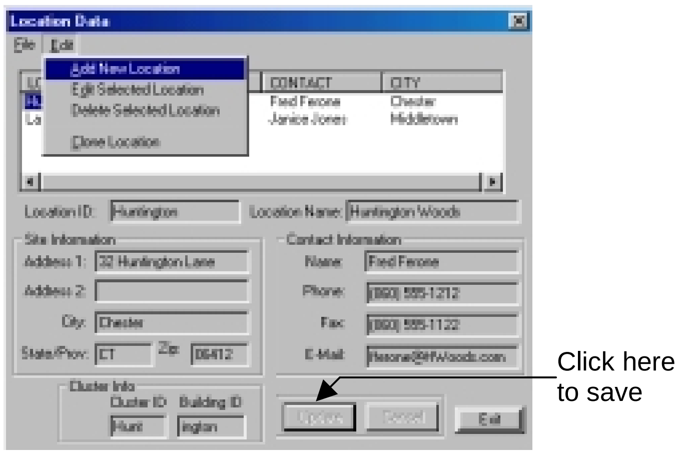


Figure 5.3 Adding Locations

5.1.2.5. Editing a Location

1. Open the Locations Database (Section 5.1.2.3).
2. Select the location you wish to edit from the Locations List Window (Figure 5.4).
3. Select Edit Selected Location from the Edit drop-down menu (Figure 5.4).

Tech Tip

Steps 2 and 3 can be avoided by simply double clicking on the location to be edited from the Locations List Window.

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4. Enter necessary changes.
5. Verify that the new information is accurate, and click the Update button to save changes.

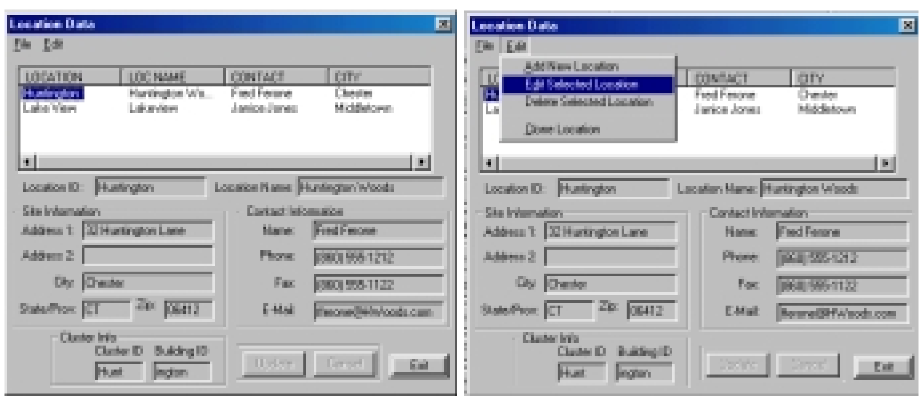

Figure 5. 4 Editing Locations

5.1.2.6. Deleting a Location

1. Open the Locations Database (Section 5.1.2.3).
2. Click the location you wish to delete from the Locations List Window (Figure 5.5).
3. Select Delete Selected Location from the Edit drop-down menu (Figure 5.5).
4. A confirmation window will appear, click Yes to continue, or No to cancel.

Warning!

Deleted Locations cannot be recovered

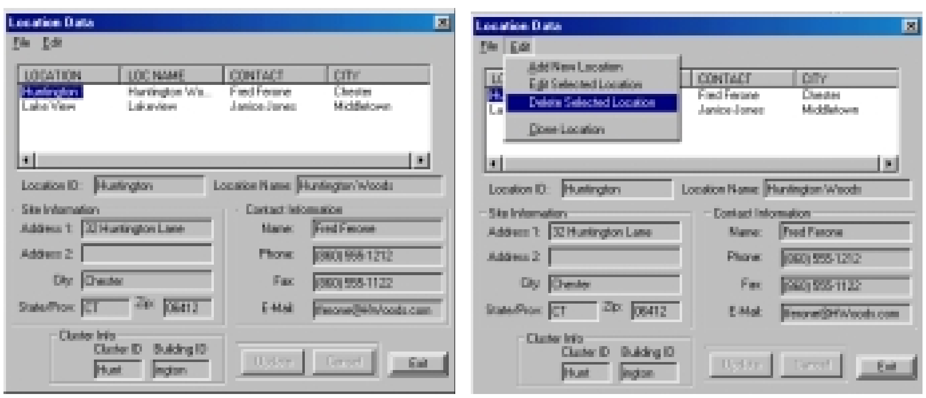

Figure 5.5 Deleting a Location

5.1.3. Viewing or Printing Location List Reports

A report can be printed to list all the locations entered in SMS2. The Report includes the Location ID, Location Name, Contact Name and City of the location.

To print a Location List Report:

1. Click the Location List button in the main SMS2 window (Figure 5.6).

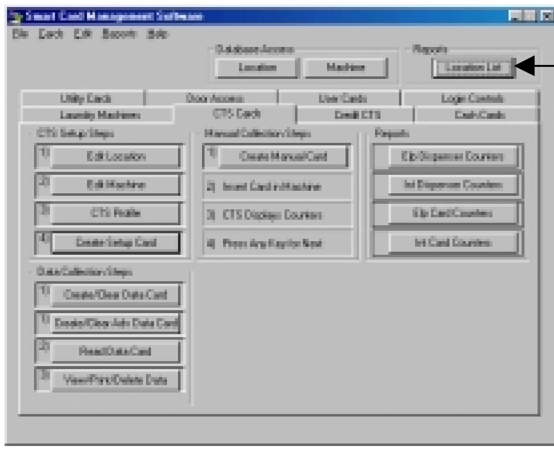

Figure 5.6 Opening a Location List Report

2. The Location List report will be open. You can view it on screen or click the printer icon to print the report (Figure 5.7)

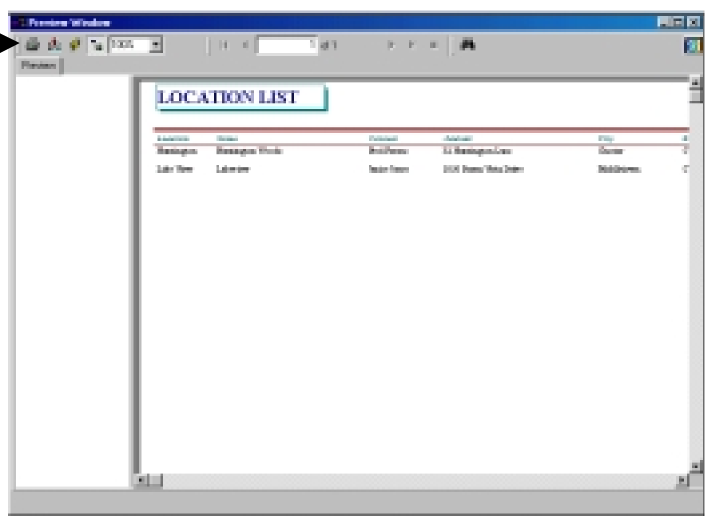

Figure 5.7 Location List Report

6.1.1. Overview

The User Cards Manager is an advanced feature of the SMS2 software package. This manager allows the system administrator to distribute individualized cards to end-users so that their activity can be tracked. This manager can also be used to assign Door Access privileges.

These features make the User Cards Manager ideal for operations that need to:

- Reconcile user transactions in cash systems.
- Track door access activity of individual end-users or employees.
- Track user activity in the laundry machines and Card Transaction Stations.

6.1.2. How Does it Work?

The User Cards Manager's database must first be set up before individual user cards can be created. Once the laundry machines, transaction machines and Door Access Readers are properly programmed, information can be tracked and a record of usage is established and maintained.

A User Data Collection card is created. This card is then used to collect the data from the machine. This User Data is later transferred into the software. Once this process is completed, a report can be viewed or printed to show individual user activity.

These are the steps that need to be followed to get the most of your User Cards Manager:

1. Enter user information into the User Manager.
2. Create individual's user cards in the User Card Manager.
3. Be sure to use the User Transaction Data Collection Dallas Stick in all Laundry Machine Readers and Card Transaction Stations where user transactions will be tracked.
4. Periodically collect data with your User Data Collection Card
5. View or print reports to see individual's usage.

6.2. User Manager

The User Manager is a part of the User Cards Manager that keeps track of all users in the system. Name, address and access information for Door Access Readers is entered into the User Manager.

Note:
Although the Access Privileges for Door Access Readers can be assigned in the User Manager, a Door Access Location List must be set up in the Door Access Manager in order for this feature to work (See Chapter 11).

6.2.1. The User Manager Interface

The User Manager is comprised of five sections (Figure 6.1):

1. The **User Information** section includes the user's personal information including name, address and access information.
2. **Card Information** that is associated with the User Card.
3. The **Access Information** section allows the administrator to assign specific Door Access privileges to each user.
4. The User Manager utilizes **command buttons** to allow for convenient access to commonly used functions.
5. The **Users List Window** allows for onscreen viewing of all users in the system.

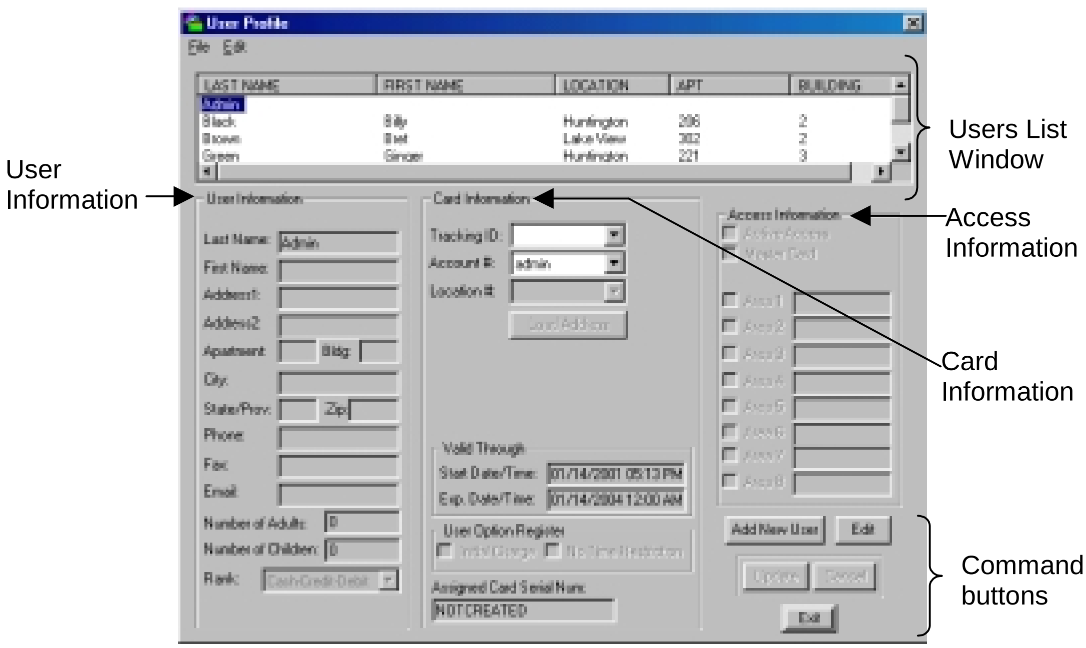

Figure 6.1 User Manager Interface

Table 6.1 describes each field in the User Manager, explains its significance and identifies field restrictions:

Table 6.1 User Manager Fields

Field Name	Description	Restrictions
Last Name	Last name of user	Up to 32 characters
First Name	First name of user	Up to 32 characters
Address 1	Address of user	Up to 32 characters
Address2	Address of user	Up to 32 characters
Apartment	Apartment number of user	Up to 16 characters
Building	Building number of user	Up to 16 characters
City	City of user	Up to 32 characters
State/Prov	State or Province of user	Up to 16 characters
Zip	Postal code of user	Up to 16 characters
Phone	Phone number for user	Up to 16 characters
Fax	Fax number for user	Up to 16 characters
Email	Email address of user	Up to 30 characters
Number of Adults	Number of adults living in apartment	No restrictions
Number of Children	Number of children living in apartment	No restrictions
Rank	The order of payment types this customer prefers to use to reconcile his or her account (Example: Cash then Credit Card then Debit Card).	Drop-down menu
Tracking ID	A customized system to save time in distributing User Cards (Section 6.3.1).	Drop down selection
Account #	Assigns a unique identity to the user	Required alphanumeric field up to 10 characters in length
Location #	Assigns user to a location existing in the Locations Manager	Required field, Drop down selection
Valid Through	Assigns a start and expiration date for the User Card (currently only applicable to Door Access Cards).	Date/Time field

continued on next page

Table 6.1 continued

Initial Charge	When this option is enabled in the User Profile as well as the Card Transaction Station a user will be charged a fee (entered in the CTS profile), the first time the card is used.	Check box
No Time Restriction	When this option is enabled the user will not be affected by time restrictions set for Door Access Readers (Chapter 11).	Check box
Assigned Card Serial #	Displays card serial number once a User Card has been assigned to the user	Software defined
Access Information	This section pertains to Door Access. Refer to Chapter 11 of this manual for further details.	Check boxes

6.2.2. Working with the User Manager

6.2.2.1. Adding a User

1. In the User Cards Manager, click the User Manager button (Figure 6.2).

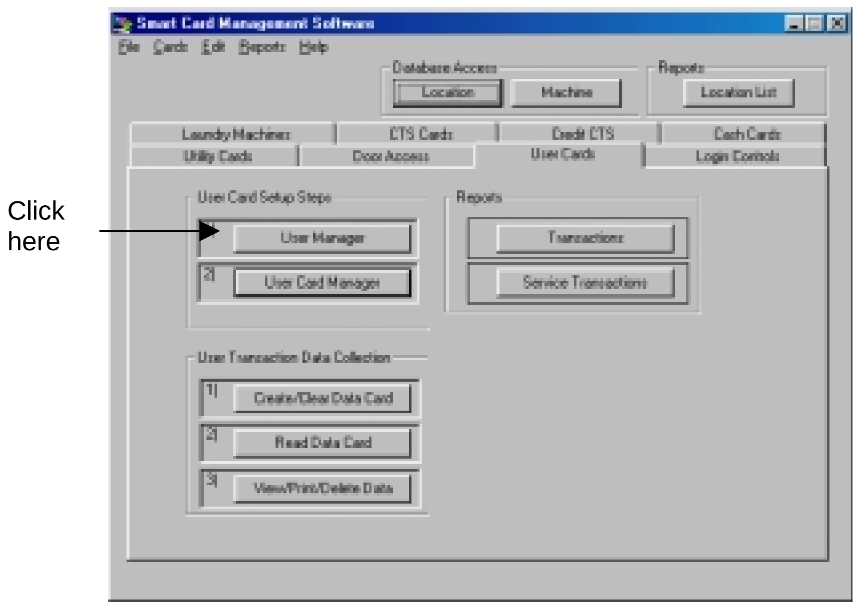

Figure 6.2 Opening the User Manager

2. Click the Add New User button or select Add New User from the Edit drop-down menu (Figure 6.3).
3. Enter or select all information for the User Information and Card Information sections (Table 6.1).

Tech Tip

When entering users in their respective locations, you can click the Load Address button to enter the address information for that location.

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4. If Door Access is being used, check all areas that the user will have access to and enable the “Active Access” option.

5. After verifying that all user information and access privileges have been entered correctly, click the Update button (Figure 6.3).

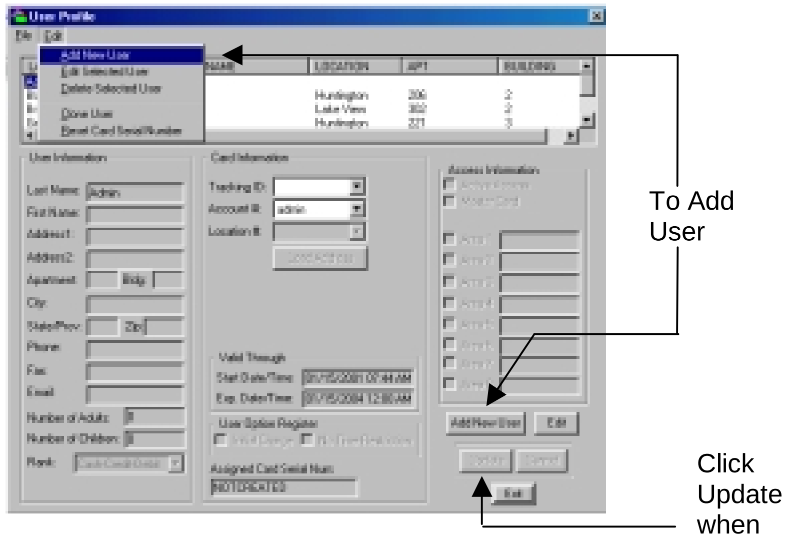

Figure 6.3 Adding a User

6.2.2.2. Editing a User

1. In the User Cards Manager, click the User Manager button (Figure 6.2).
2. Click the user you wish to edit from the Users List Window (Figure 6.4).
3. Select Edit Selected User from the Edit drop-down menu (Figure 6.4).

Tech Tip

Steps 2 and 3 can be avoided by simply double clicking on the user to be edited from the Users List Window.

---

4. Make necessary changes.
5. Verify that the new information is accurate, and click the Update button to save changes.

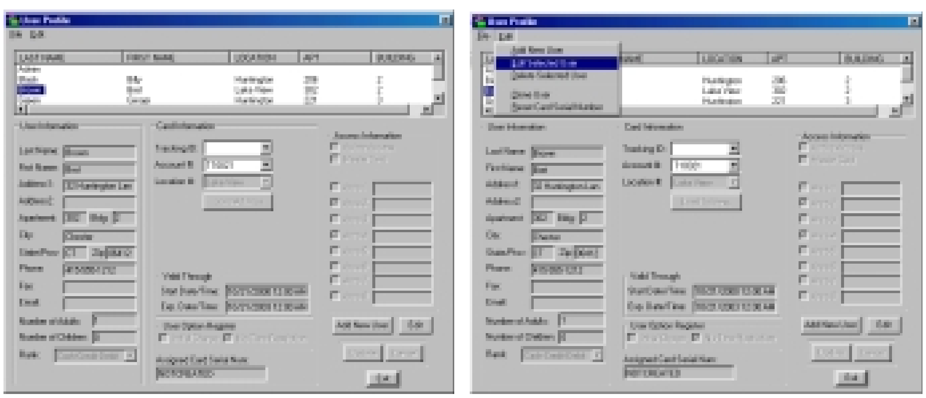

Figure 6.4 Editing a User

6.2.2.3. Deleting a User

Warning!

When deleting a User, the database retains the user information for report generation only. A deleted user cannot be recovered.

1. In the User Cards Manager, click the User Manager button (Figure 6.2).
2. Click the User you wish to delete from the Users List Window (Figure 6.5).
3. Select Delete Selected User from the Edit drop-down menu (Figure 6.5).
4. A window will appear to verify deletion of selected users, click the Yes button to proceed with the deletion. Click the No button to cancel this operation.

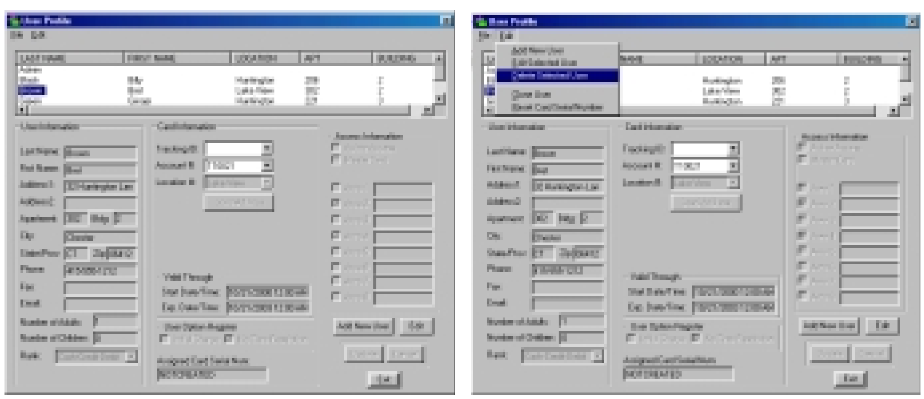

Figure 6.5 Deleting a User

6.2.2.4. Cloning Users

The cloning feature has been included with SMS2 as a timesaving feature for adding multiple users with similar information, such as tenants from the same apartment but with separate accounts.

The cloning feature allows the system administrator to copy all the information for an existing user except for the Account Number, and name fields.

To clone a user, follow these steps:

1. In the User Cards Manager, click the User Manager button (Figure 6.2).
2. Click the user you wish to clone from the Users List Window.
3. Select Clone User from the Edit drop-down menu (Figure 6.6).
4. Enter a new account number and make any other changes.
5. Enter the user’s name in the appropriate fields.
6. Click the Update button to save the information for the new user to the database.

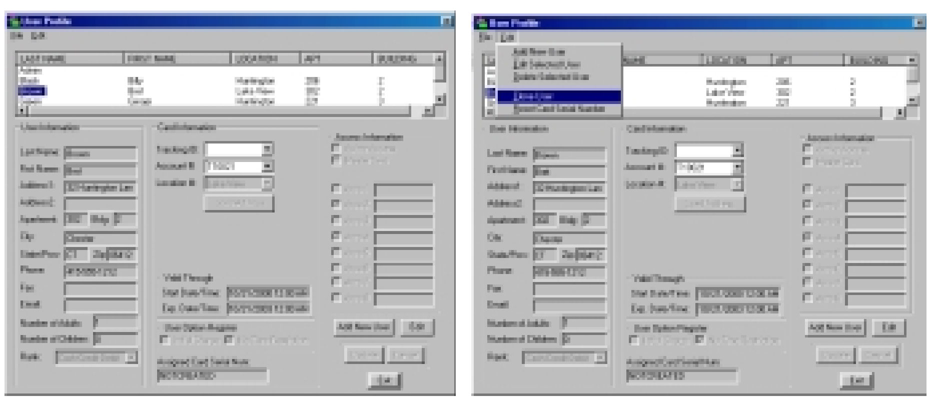

Figure 6.6 Cloning a User

6.2.2.5. Resetting a User Card Serial Number

If a new card needs to be issued to a user after one has already been issued, the card serial number that is tracked in the User Profile needs to be reset first.

To do so follow these steps:

1. In the User Cards Manager, click the User Manager button (Figure 6.2).
2. In the Door Access User Profile Window select the user for whom the card serial number is to be reset (Figure 6.7).
3. Click the Edit button.
4. Select Reset Card Serial Number from the Edit drop-down menu (Figure 6.7).
5. A warning window will appear, click Yes to continue or No to cancel.
6. Click the Update button.

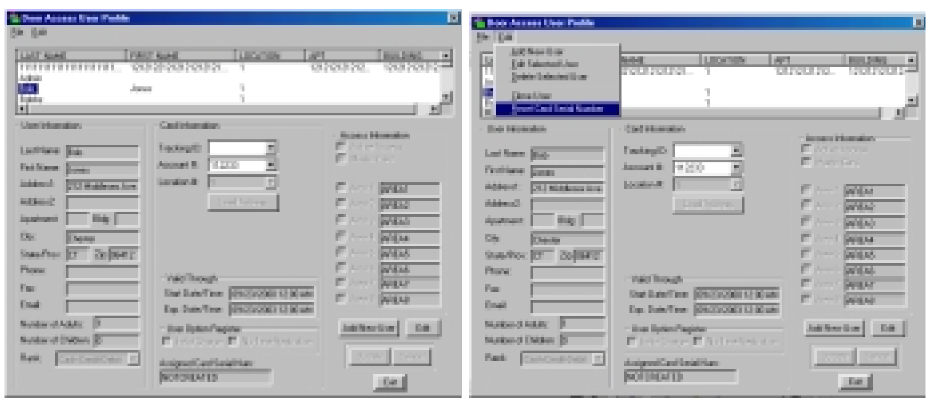

Figure 6.7 Resetting a User Card Serial Number

6.3. Creating User Cards

Once a user or a number of users have been entered into the system, user cards can be issued. The User Card Manager is the tool for creating these cards.

The User Card Manager creates either single user cards, or it can allow for convenient multiple card creation.

6.3.1. Tracking ID (Optional Feature)

The Tracking ID feature has been implemented to save time in issuing cards to a large number of users

Cards can be purchased with an external Tracking ID number printed on the card. In this case Greenwald Intellicard can provide a database disk that contains all of the Tracking ID numbers and their corresponding internal card serial number.

Once this database is copied into the software the User Manager can use this information to associate a card's internal serial number to the Tracking ID number on the card. This means that when entering a user into the system, an available Tracking ID number is selected and the user is issued that card.

This saves time because the card creation procedure is bypassed.

Note:
Importing the Tracking ID User Database is covered in Appendix A.

6.3.2. Working with the User Card Manager

6.3.2.1. Creating a Single User Card

1. In the User Cards Manager tab, click the User Card Manager button (Figure 6.7).

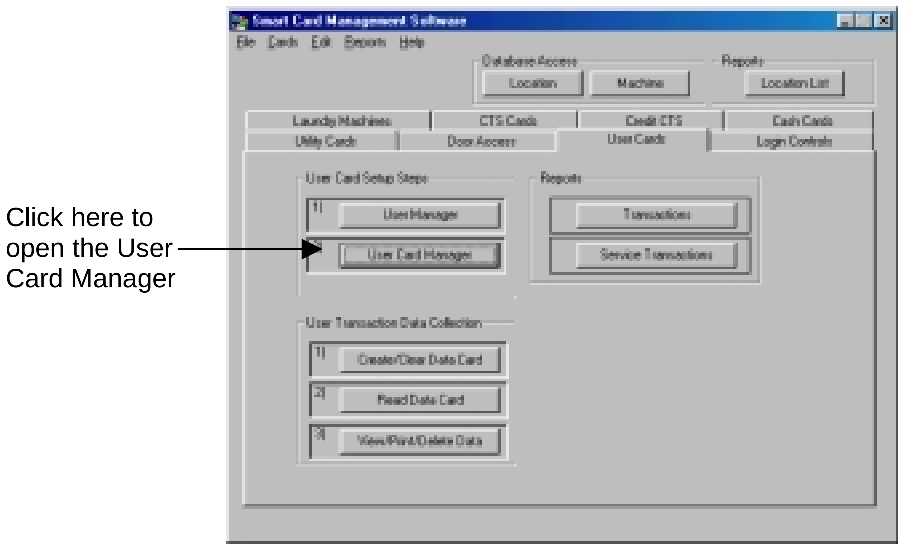

Figure 6.7 Opening the User Card Manager

2. Select the user's location from the Card Location drop down selection (Figure 6.8).
3. If this card is being created for a new user, select the "Load only new users for this location" sorting option to limit the number of users to be listed (Figure 6.8).
4. Select the User Account Number or name from the appropriate drop down selection (Figure 6.8).

Tech Tip

If managing a large number of users, you may first select the user's building, apartment or telephone number to narrow the number of users that will appear in the Account Number or Name field.

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5. If this user card will also be used for door access privileges, enable the "Create Door Access Card" option by clicking on the appropriate box (Figure 6.8).
6. Insert a user card into the PC Reader (Section 2.4.2).
7. Click the Create Card button (Figure 6.8).

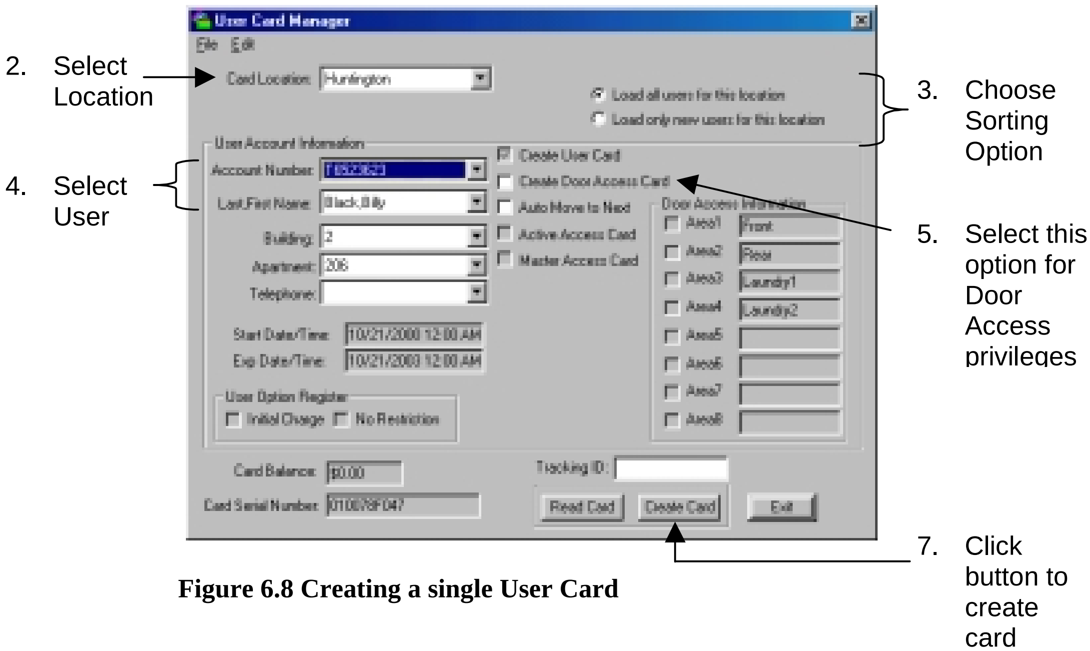

Figure 6.8 Creating a single User Card

8. A window showing the card creation progress will appear. When it has closed, the card has been created (Figure 6.9).

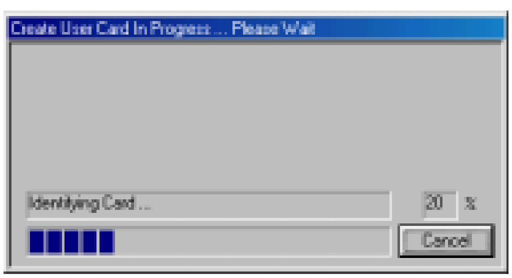

Figure 6.9 Card Creation Progress Window

6.3.2.2. Creating Multiple User Cards

SMS2 allows for creation of multiple user cards by location or specific buildings in a location. This option can be used to create cards for all users in a selected location/building or for new users only (those who have not had a user card issued to them).

To create multiple user cards, follow these steps:

1. In the User Cards Manager tab, click the User Card Manager button (Figure 6.7).
2. Select the users' location from the User Location drop down selection (Figure 6.10).
3. If cards are being created only for new users, select the "Load only new users for this location" option (Figure 6.10).
4. If cards are being created only for a specific building for this location, select the building from the Building drop down selection (Figure 6.10).
5. If these user cards are to be used for door access privileges, enable the "Create Door Access Card" option by clicking on it (Figure 6.10).
6. Enable the "Auto Move to Next" option (Figure 6.10). This will automatically go to the next new user to be created in the list.
7. Insert a blank user card into the PC Reader (Section 2.4.2).
8. Click the Create Card button (Figure 6.10).

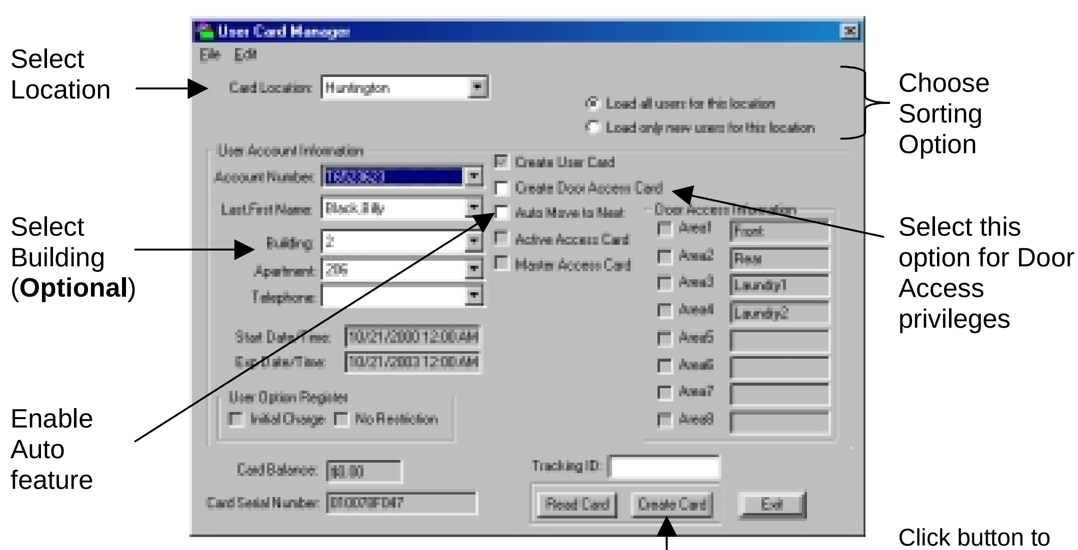

Figure 6.10 Creating Multiple User Cards

9. A window showing the card creation progress will appear. When it has closed, the card has been created (Figure 6.9).
10. The software will automatically move to the next user in that location/building. Insert a new card and click the Create Card button again and continue this process for creating the desired number of user cards.

6.4. User Transaction Data Collection Dallas Stick

In order to benefit from the User Card options, all machines must be equipped with the User Transaction Data Collection Dallas Stick.

If Laundry Machine Readers and Card Transaction Stations are not currently equipped with the User Transaction Data Collection Dallas Stick, an upgrade can be purchased by contacting Greenwald Intellicard at 1-800-221-0982.

Warning!

Once a user card is issued, it will work on all programmed Laundry Machine Readers and Card Transaction Stations regardless of whether the User Transaction Data Collection Dallas Stick is installed in these units or not.

6.5. Collecting Data

When a User Card is used to operate a unit that has been programmed to record machine activity, a transaction data record is kept in its memory. To retrieve transaction records and view them, follow these three steps.

1. Create a User Data Collection Card.
2. Collect data from the machine.
3. Read the Data Card (transfer the transaction record into the software).

Once these steps are completed, reports of user transactions can be viewed or printed (Section 6.6.1).

6.5.1. Creating a User Data Collection Card

1. Insert an 8K Management Smart Card into the PC Reader (Section 2.4.2).

Warning!

This process will delete any previous collections on the card. If this card has been used for data collections in the past, read the data card into the appropriate manager first.

2. Click the Create Data Card button in the User Cards tab (Figure 6.11).

Click here to create a User Data Card

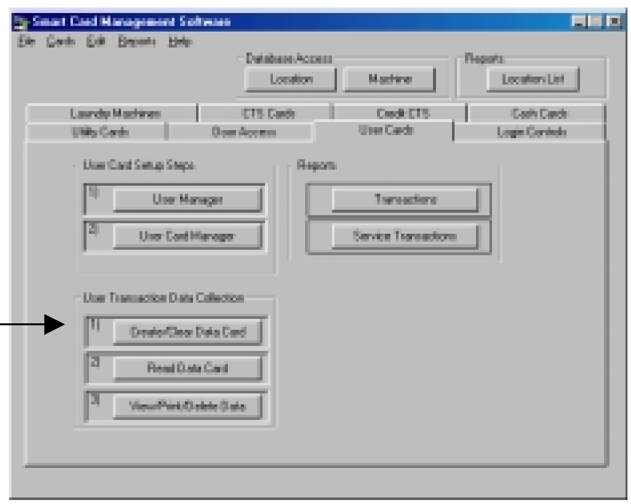

Figure 6.11 Create User Data Card

3. A card creation progress window will appear. When completed, the card has been created (Figure 6.12).

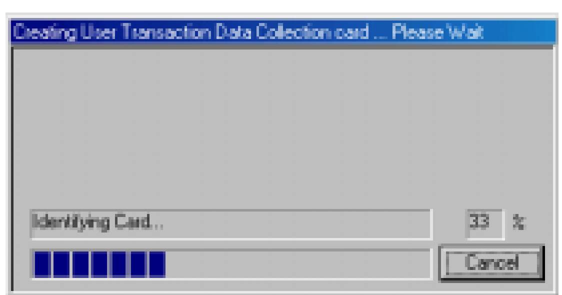

Figure 6.12 Card Creation Progress Window

6.5.2. Collecting the User Data

Before any User data can be collected, a Service Card must first be inserted into the reader of the laundry machine or Card Transaction Station (for further details on creating Service Cards, see Chapter 13). To collect data, insert the User Data Collection Card into machine within one minute of removing the Service Card and follow the instructions on the display.

Note:
Each User Transaction Collection Card has a limited capacity. Depending upon the amount of data being collected, each card can collect the data from 1 to 20 machines. These cards are also reusable. Once the data is transferred from the card to a PC, you can recreate the collection card, erasing all previous collections.

6.5.3. Reading User Data Collection Cards

Reading the Data Card transfers the transaction records into the PC so that the data can be viewed or used for report generation.

To read the User Data Collection Card:

1. Insert a User Transaction Data Collection Card with data on it into the PC Reader (Section 2.4.2).
2. Click the Read Data Card button in the User Cards tab (Figure 6.13).

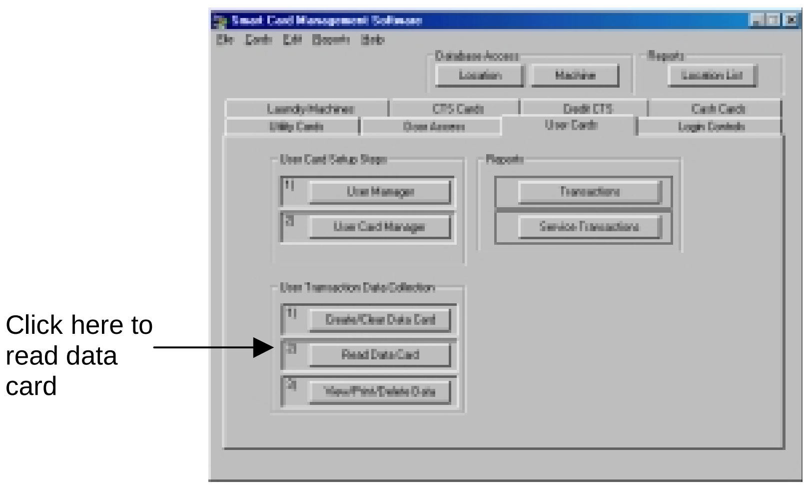

Figure 6.13 Reading a User Data Card

3. Select one of the viewing options, then click the Read CTS Collection Card button (Figure 6.14).

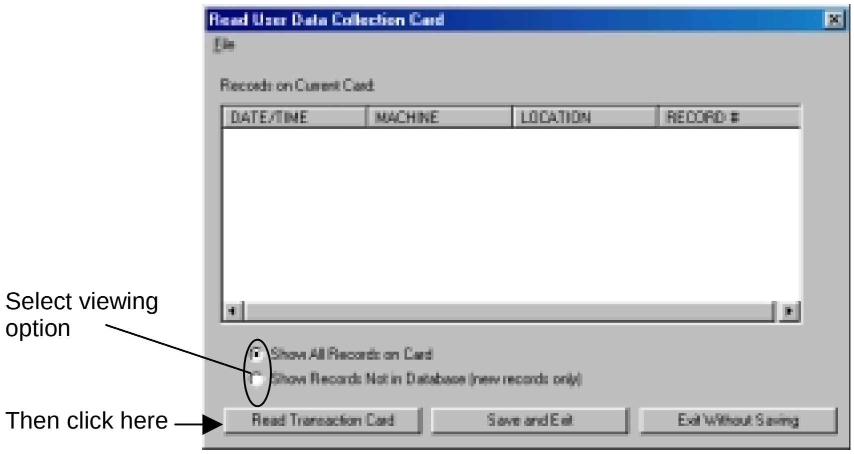

Figure 6.14 Reading the User Data Collection Card

4. The Read User Data Collection Card window will open and list all the User data collections on the card. Select which records to save select the Save Selected Records from the File drop-down menu or click the Save and Exit button to save all records (Figure 6.15).

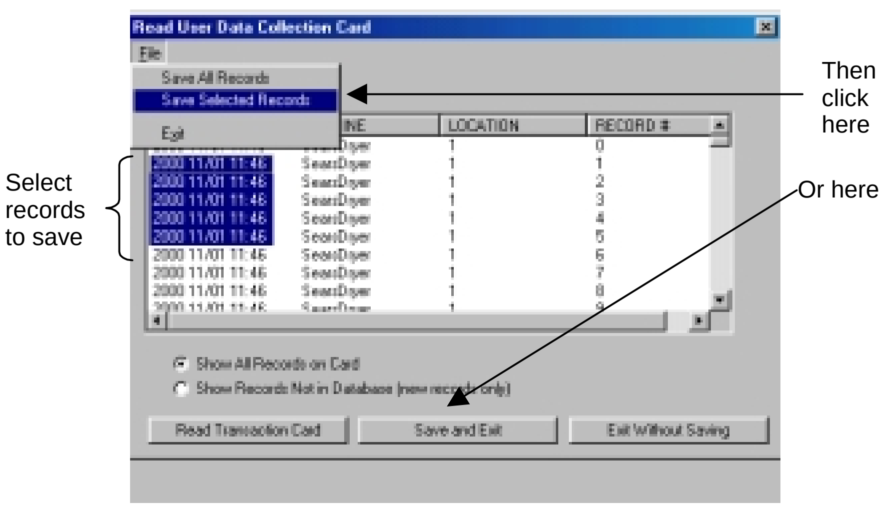

Figure 6.15 Saving the Collection Records

5. Double-clicking on a collection record listed in the Read User Data Collection Card window will open a window containing the Transaction Information, Machine ID, Location and Collection Date/Time of that record.

6.6. User Reports

User reports allow you to view or print a detailed report showing an individuals’ usage of the different machines supported by the SMS2 software. Both User and Service transaction reports are available in the User Cards Manager

6.6.1. Viewing and Printing User Reports

Once data has been collected and transferred to a PC, follow these steps to view or print a report:

1. In the User Cards Manager click the desired report or select it from the User submenu of the Reports drop-down menu in the main SMS window (Figure 6.16).

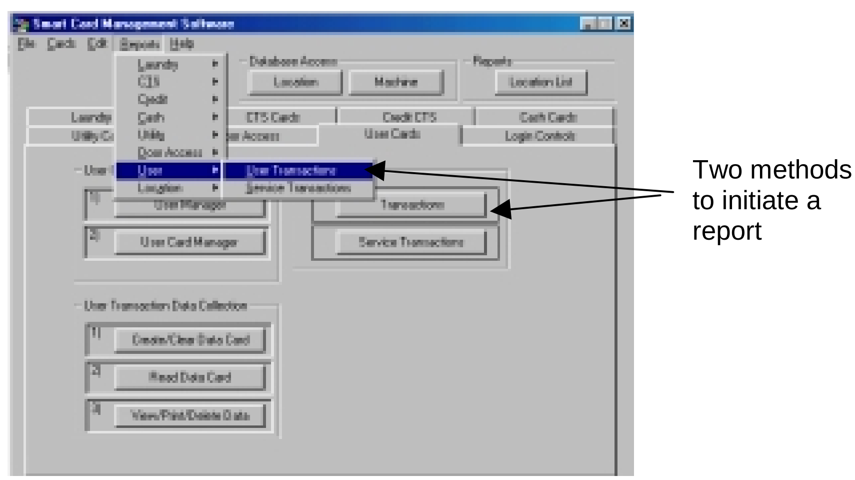

Figure 6.16 Accessing User Reports

2. A window specifying a date range will appear (Figure 6.17). Enter the beginning and ending transaction dates for the desired report. You can select the “No upper Bound” option to view a report containing all transactions since the “Start of range” field value or select the “No lower Bound” option to view a report containing all transactions leading up to the “End of range” value.

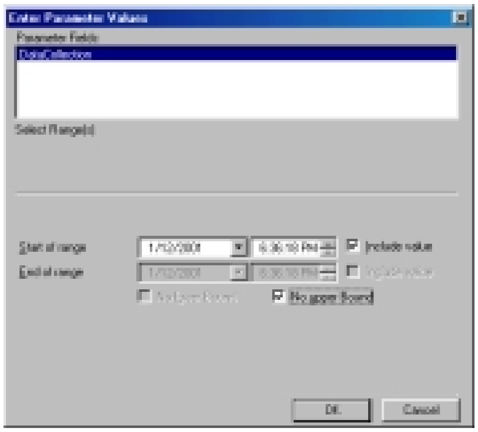

Figure 6.17 Date Range Window

3. The report will be generated and appear on your screen. You can either view it on the screen, or click the printer icon to print the report (Figure 6.18).

Click here to print report

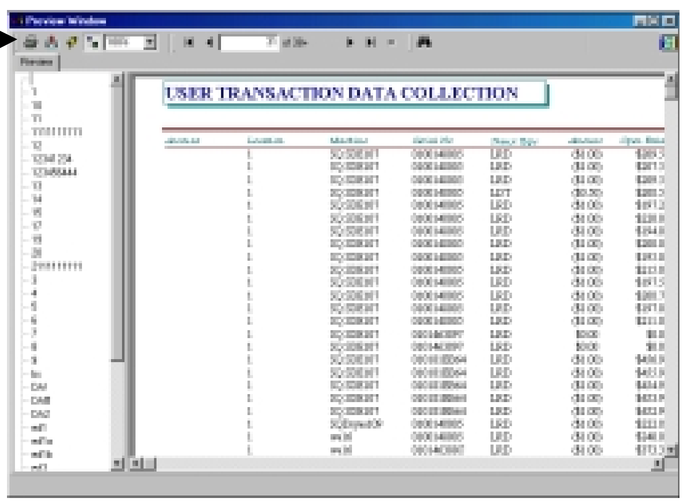

Figure 6.18 Cash Card Report Window

6.6.2. Understanding User Reports

The report generated reflects all collected transactions for the date ranges that were specified.

Tables 6.2 and 6.3 identify and explain each field in the User and Service Transaction Data Collection Report.

Table 6.2 User Transaction Data Collection Report

Field Name	Description
Account	User's account number.
Location	Location of transaction.
Machine	Machine ID of transaction.
Serial No.	Serial number of User Card.
Dispensed	Was a card dispensed or not.
Amount	Amount of money for transaction.
Open Balance	Balance prior to transaction.
Closed Balance	Balance after transaction.
Transaction Date/Time	The date and time of transaction.
Collection Date/Time	The date and time of collection.

Table 6.3 Service Transaction Report

Field Name	Description
Account	User's account number.
Location	Location of transaction.
Machine	Machine ID of transaction.
Serial No.	Serial number of Service Card.
Transaction Type	Type or transaction.
Transaction Date	Transaction date and time.
Collection Date/Time	The date and time of collection.

6.6.3. Deleting Collection Data

Warning!

Deleted collection data cannot be recovered.

You can periodically purge the collection data so that it will not take up unnecessary disk space on your computer.

1. Click the View/Print/Delete button (Figure 6.19).

Click here

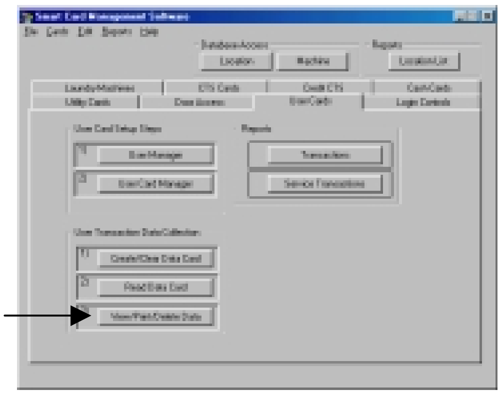

Figure 6.19 The Data Collected Window

2. Select the collection records to delete (Figure 6.20).
3. Select Delete Selected Records from the Edit menu (Figure 6.20).

Then click here

Select data to delete

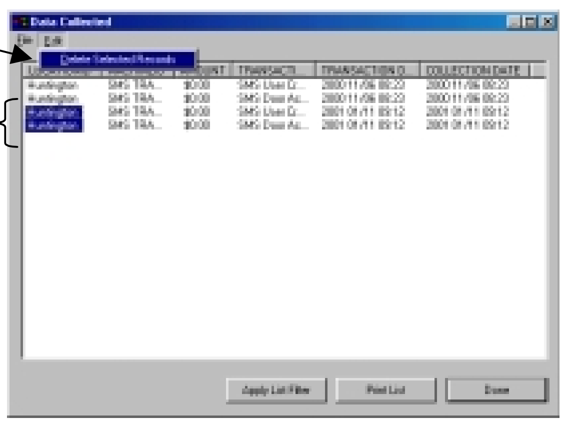

Figure 6.20 Deleting the Collected Data

4. A confirmation window will appear. Click the Yes button to proceed or the No button to cancel.

Machine Manager

7

7.1.1. Overview

Once Locations are defined and entered into the system, all machines must be defined. Machines include:

- Laundry Card Readers
- Cash Transaction Stations
- Credit Card Transaction Stations

During the setup process each machine type and make are entered into the Machine Manager and associated with a location. When entering machines of the same type that are in the same location you may enter the machine into the software only once. However if individualized reports are desired or when user transaction data collection is used, it is necessary to assign each machine a unique identification.

7.1.2. Working with Machine Manager Records

7.1.2.1. The Interface

The Machine Manager Record consists of three components (Figure 7.1):

1. The **Machine Manager List Window** lists the following information on all of the Machines: The Machine ID, associated location, position in room, machine type and make of machine.
2. The main body of the record contains the **Machine information** detailed in Table 7.1, display options, collection and installation date information.
3. **Command buttons** for the most commonly used features have been included for ease of use.

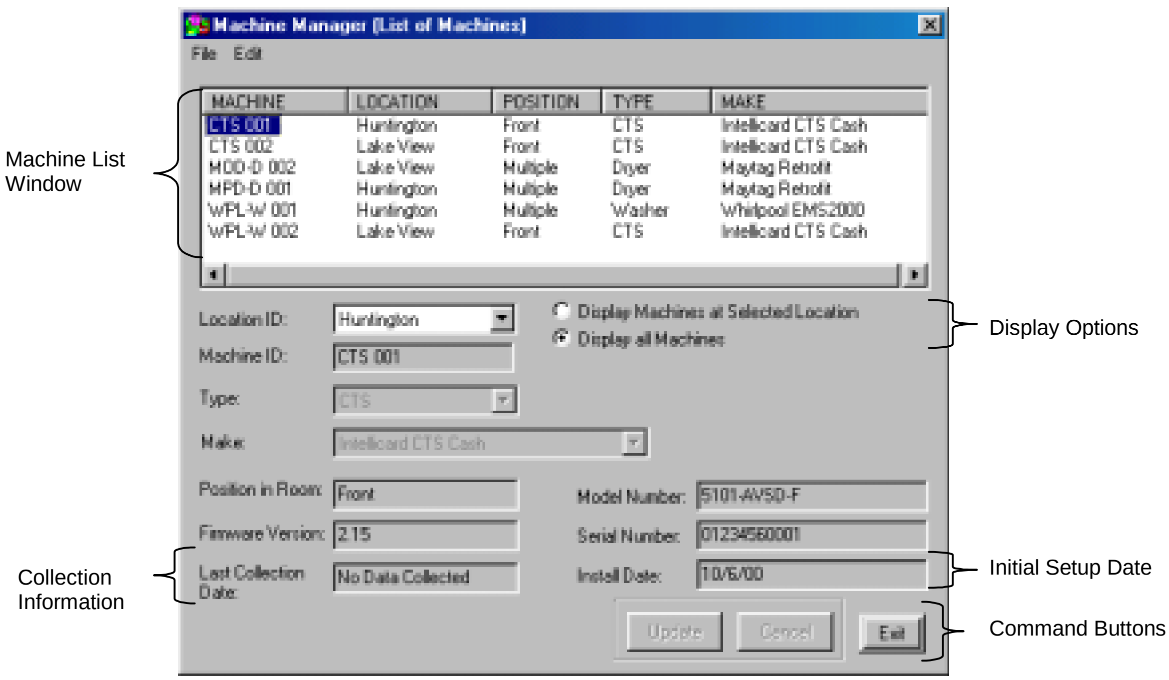

Figure 7.1 Machine Record Interface

Table 7.1 describes each field in the Machine Record and identifies the field restrictions.

Table 7.1 Machine Record Fields

Field Name	Description	Restrictions
Location ID	Required field. Operator selects a Location to be associated with machine.	Drop-down menu listing operator-defined Locations
Machine ID	Required field, assigns a unique identity to the machine. The software uses this identification in reports, machine setup and card creation.	Any unique alphanumeric combination up to ten characters in length
Type	Required field. Operator selects a machine type (example: washer, dryer, stack and CTS).	Drop-down menu listing machine types predefined by software
Make	Required field. Operator selects a machine make from a list corresponding to the machine type	Drop-down menu listing machine makes predefined by software according to machine type selected
Position in Room	Optional field that is manually entered and updated. Used for describing position of machine in room. This field is especially helpful if each machine in a location is setup independently.	Up to 10 characters
Firmware Version	Optional field that is manually entered and updated. Allows system operator to quickly view firmware version of machine.	Up to 10 characters
Model Number	Optional field that is manually entered and updated. Model number of machine.	Up to 48 characters
Serial Number	Optional field that is manually entered and updated. Serial number of machine.	Up to 48 characters
Last Collection Date	Automatic field. Software records the date of the last data collection.	Defined by software
Install Date	Software records the date of the initial machine setup.	Defined by software
Sorting Options	Allows system operators to view entire machine database or selected by location.	Check-box selections

7.1.2.2. Supported Machines

At the time of this publication, SMS2 is capable of supporting numerous machine readers and Card Transaction Stations. Table 7.2 lists all machines currently supported by the software. Greenwald Intellicard is continually developing and implementing solutions for different laundry machines. If the list does not include a machine make that you are currently operating, please contact Greenwald Intellicard for possible software upgrades.

Table 7.2 SMS2 Supported Machines

Machine Type	Machine Make
Washers	Whirlpool EMS 2000
	Maytag Retrofit/Gen2
	Speed Queen Retrofit
	Continental Retrofit
	Dexter Retrofit
	Wascomat Retrofit
	Whirlpool EMS 1000 Retrofit
	Sears W 260516908
	Speed Queen W SWT210/211*A
	Speed Queen W SWT220/221*A
	Speed Queen W SWT020/221*A
	Hubesch W HWT120*C
	Hubesch W HWT110*C

continued on next page

Table 7.2 continued

Dryers	Whirlpool EMS 2000
	Maytag Retrofit/Gen2
	American Dryer Retrofit
	Speed Queen Retrofit
	Whirlpool EMS 1000 Retrofit
	Sears D 660051690
	Speed Queen D SDE107*F
	Speed Queen D SDG109*F
	Speed Queen D SDG 009*A
	Hubesch D HDE107*F
	Hubesch D HDG109*F
Stack Dryers	Whirlpool EMS 2000
	Maytag Retrofit/Gen2
	American Dryer Retrofit
	Sears S 2679082990
	Speed Queen S SSE107/117*F
	Speed Queen S SSG109/119*F
	Hubesch S HSE107/117*F
	Hubesch S HSG109/119*F
CTS	Intellicard CTS Cash/MiniMate
	Intellicard CTS Credit
	Intellicard CTS Combo Box

*****

An asterisk indicates that any character(s) in its place will be supported.

7.1.3. Working with the Machine Manager

7.1.3.1. Opening the Machine Manager Record

There are two ways to open the Machine Manager Record (Figure 7.2):

- Clicking the Machine button in the main SMS2 interface, or
- Clicking the Machine button within the related managers: Laundry Machines, CTS Card and Credit CTS.

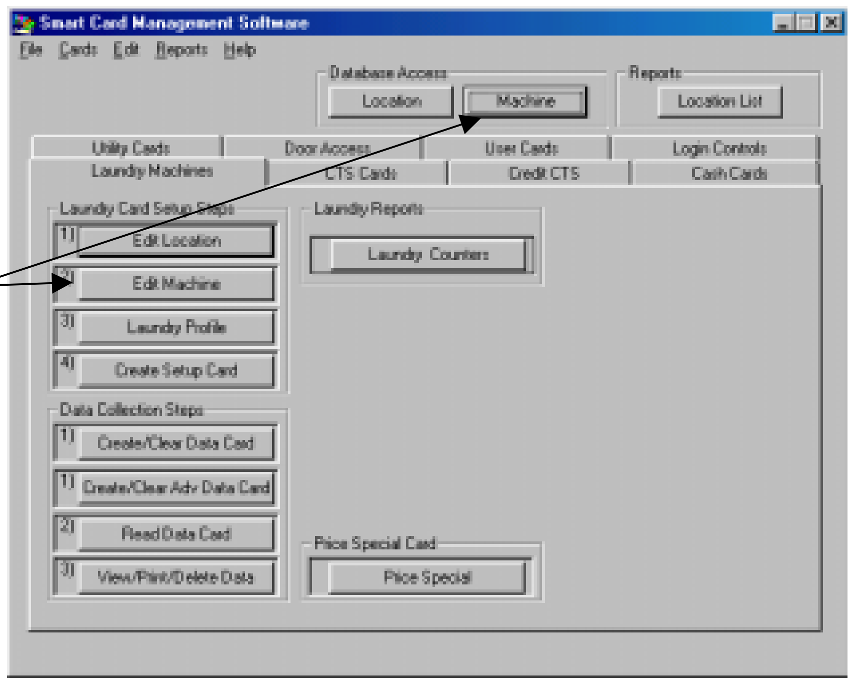

Figure 7.2 Opening the Machine Manager Record

7.1.3.2. Adding a Machine

1. Open the Machine Manager (Figure 7.2).
2. Select Add New Machine from the Edit drop-down menu (Figure 7.3).
3. Enter data into fields (Table 7.1).
4. Verify that all data has been entered or selected correctly.
5. Click the Update button to save new machine.

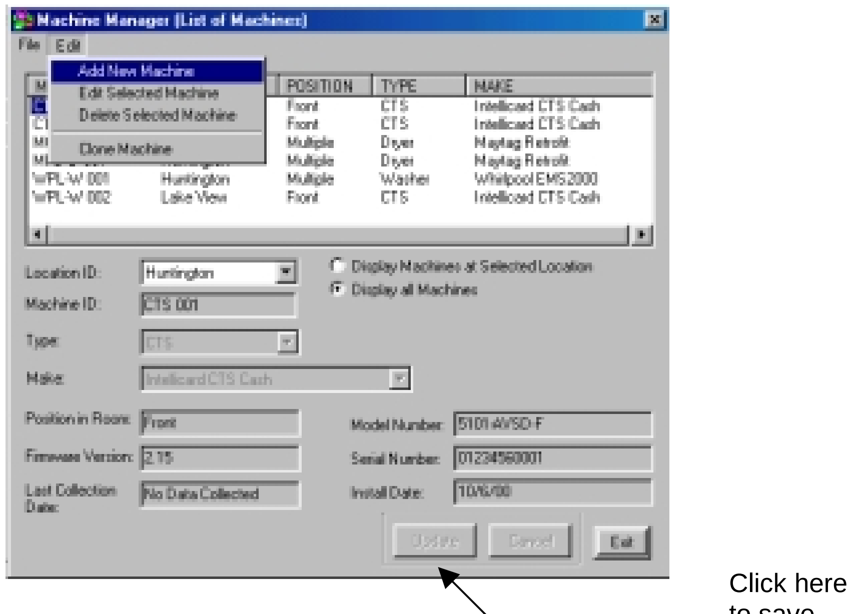

Figure 7. 3 Adding a Machine

7.1.3.3. Editing a Machine

1. Open the Machine Manager (Figure 7.2).
2. Click the machine to edit from the Machine List Window (Figure 7.4).
3. Select Edit Selected Machine from the Edit drop-down menu (Figure 7.4).

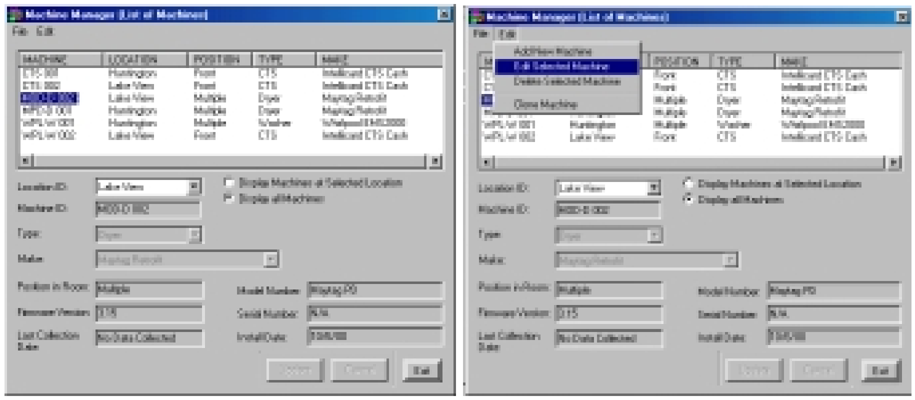

Figure 7. 4 Editing Machines

Tech Tip

Steps 2 and 3 can be avoided by simply double clicking on the machine to be edited from the Machine List Window.

4. Make necessary changes.
5. Verify that the new information is correct, and click the Update button to save changes (Figure 7.5).

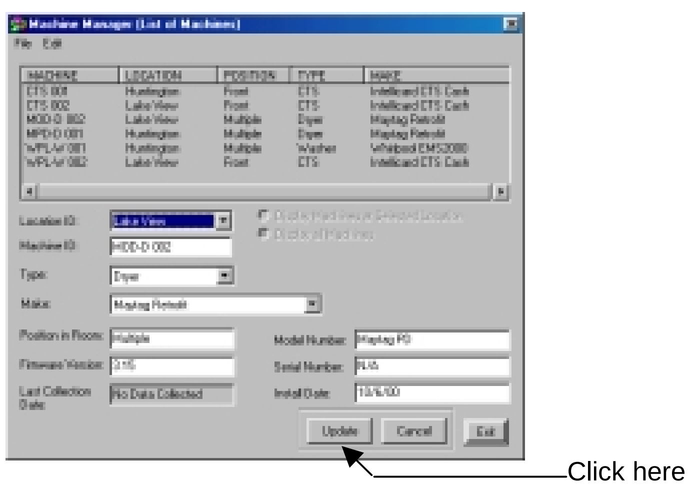

Figure 7.5 Saving Changes

7.1.3.4. Deleting a Machine

Warning!

When deleting a Machine, the database retains the information for report generation only. Deleted Machines cannot be recovered

1. Open the Machine Manager record (Figure 7.2).
2. Click the machine to delete from the Machine List Window (Figure 7.6).
3. Select Delete Selected Machine from the Edit drop-down menu (Figure 7.6).

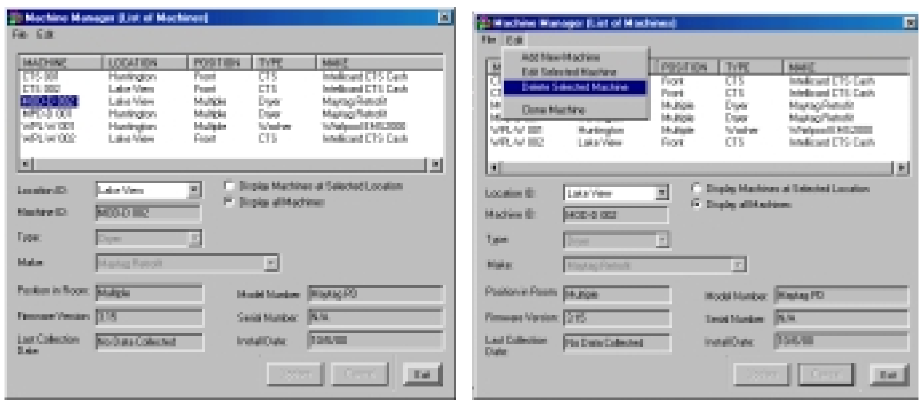

Figure 7.6 Deleting a Machine

4. A message will appear to verify deletion of selected Machine. Click the Yes button to proceed with deletion of machine or No to cancel (Figure 7.7).

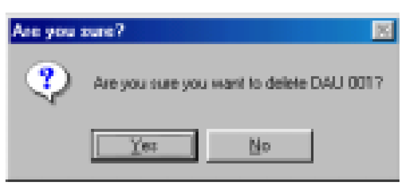

Figure 7.7 Deletion Confirmation Window

7.1.3.5. Cloning a Machine

The cloning feature has been included with SMS2 as a time saving feature for adding multiple machines with similar information. This feature is ideal in facilities where each machine is setup individually with its own ID to track usage.

The cloning feature allows the system operator to copy all the information from an existing machine in the database except for the Machine ID field. Once a machine is cloned, the operator enters a new Machine ID, and the new Machine information will be saved as a new record.

1. Open the Machine Manager (Figure 7.2).
2. Click the machine to clone from the Machine List Window (Figure 7.8).
3. Select Clone Machine from the Edit drop-down menu (Figure 7.8).

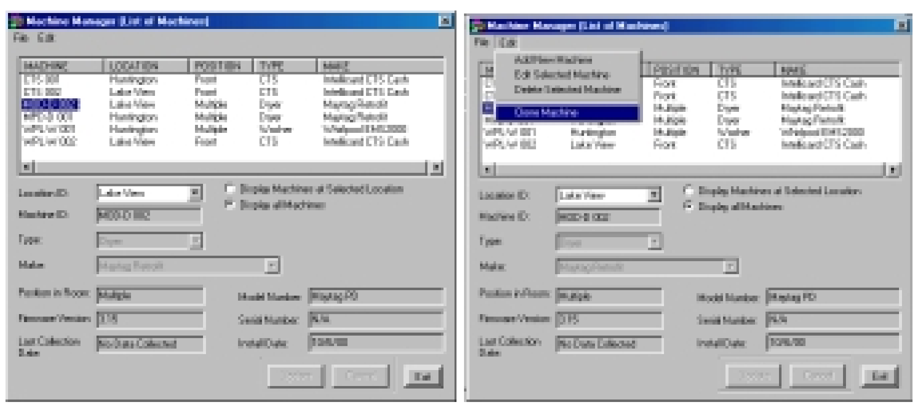

Figure 7.8 Cloning a Machine

4. Enter a new machine identification in the Machine ID Record (Figure 7.9).
5. Click the Update button to save new machine record (Figure 7.9).

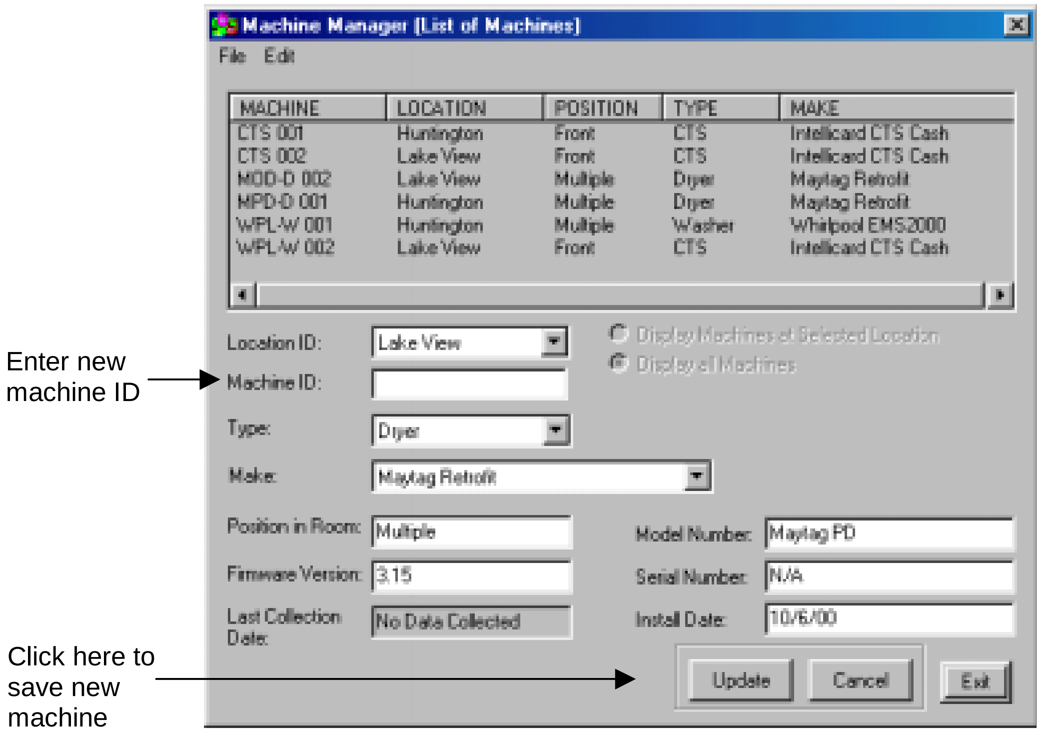

Figure 7.9 Completing the Cloning Process

7.1.3.6. Viewing the Machine List

1. Open the Machine Manager (Figure 7.2).
2. The Machine(s) will be listed in the Machine List Window.
3. Select a sorting preference by clicking the appropriate check-box (Figure 7.10):
    a. Display Machines at Selected Locations. This permits viewing only machines associated with the location selected in the Location ID record.
    b. Display All Machines. Displays all machines in the database.
4. To view details of an individual machine, select it by clicking on the corresponding Machine ID in the Machine List Window.

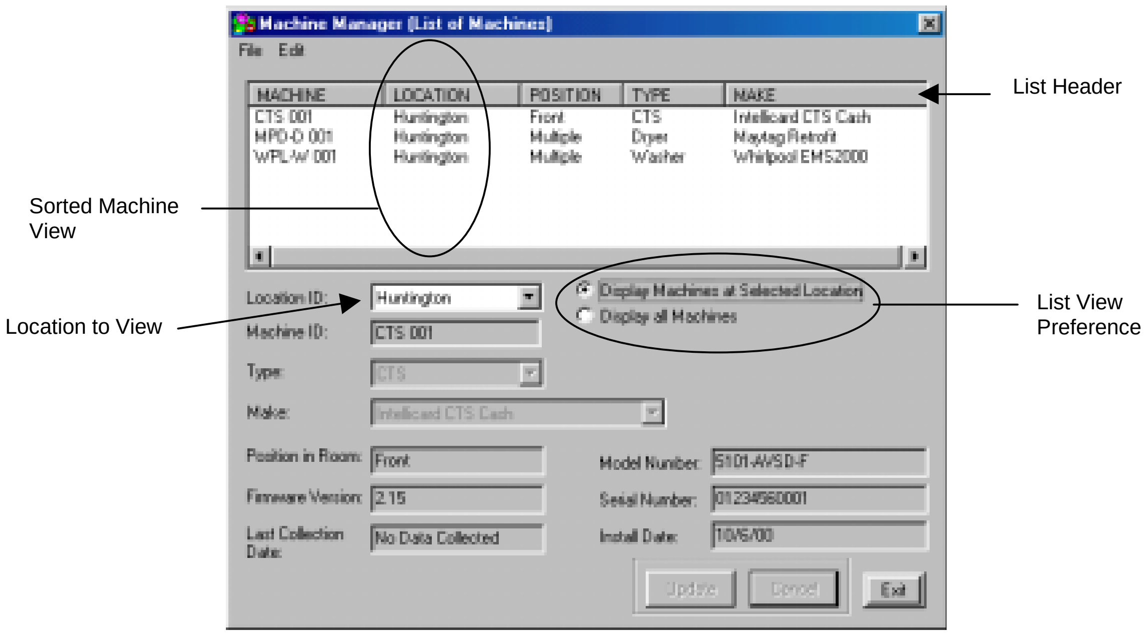

Figure 7.10 Viewing Machines by Location

Tech Tip

To further sort the machine list, click the header that corresponds to the field by which you wish to sort. For example, to view all Washers, click the Type list header. This will sort the list by machine type and all the washers will be grouped together.

7.1.3.7. Printing a List of Machines

A list of all the machines in the database can be printed. The report includes the Machine ID, Location, Position, Type and Make of each machine.

To print the List of Machines report:

1. Open the Machine Manager (Figure 7.2).
2. Select Print List from the File drop-down menu (Figure 7.11).

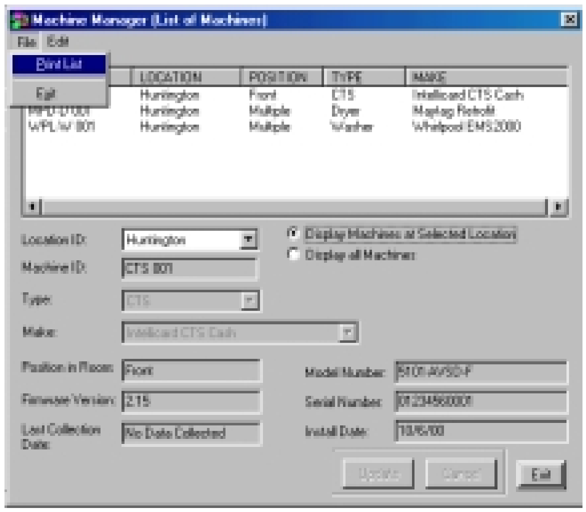

Figure 7.11 Opening the Machine List Report

3. In the List Print Manager Window click the Print button (Figure 7.12).

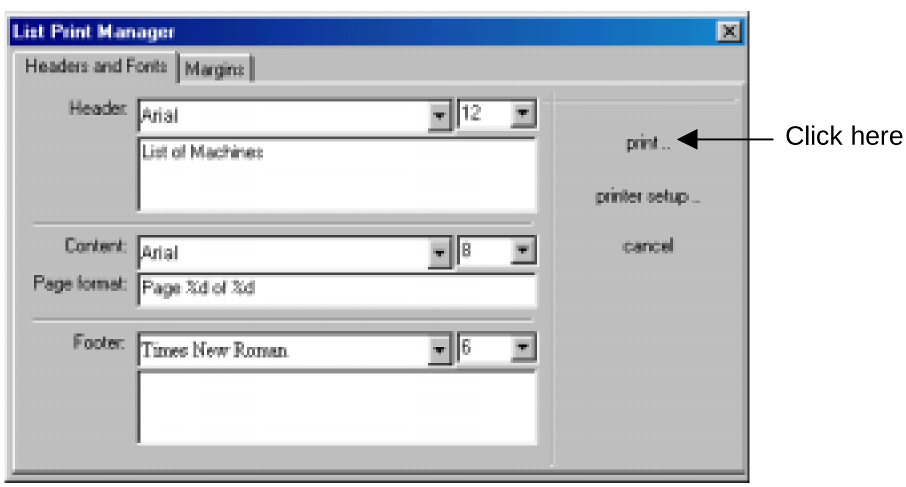

Figure 7.12 Printing the Machine List Report

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LAUNDRY MACHINES

8

8.1.1. Overview

An important function of the SMS2 software is to manage Smart Card operated laundry machines that are equipped with Greenwald Intellicard Machine Card Readers. The Laundry Machines Manager is the SMS2 module that is used to manage the data and functions needed to setup and operate washers, dryers and stack laundry machines.

The capabilities of the Laundry Machines Manager include:

- Entering and managing Laundry Machine Profiles
- Creating Laundry Machine Setup Cards
- Defining and creating cards for Price Special Profiles
- Data collection and report generation

8.1.1.1 Laundry Machine Profiles

Laundry Machine Profiles define various functions and operation of the Machine Card Readers and the laundry machines they control. Profiles differ for each machine type (Section 8.2), but generally contain information such as:

- Pricing
- Cycle durations
- Display message specifications
- Location restrictions
- Data collection and cash deduction option

8.1.1.2. Laundry Machine Setup Cards

Laundry Machine Setup Cards are used to program the Machine Card Readers with the data that has been entered into the software. When the card is created, a Location, Machine ID and Profile are selected and that information is loaded onto a Smart Card. This card can then be used to program one or more Machine Card Readers.

8.1.1.3. Price Special Profiles

SMS2 allows for special pricing based on the time of day and the day of the week. Price Special Profiles can be used for discounts during off hours or premium pricing at peak use. Additionally, this feature can be used to disable a machine at a specified time.

The Laundry Machines Manager allows you to define any number of Price Special Profiles and create cards to program this information into the Machine Card Readers. This feature can only be used on machines previously programmed.

8.1.1.4. Data Collection and Report Generation

The Laundry Machines Manager is used to create Laundry Machine Data Collection cards so that data can be collected. Once this card has been used to collect the machine information, the Laundry Machines Manager is used to read the data and generate reports.

8.1.1.5. The Laundry Machines Manager Interface

The Laundry Machines Manager (Figure 8.1), is used to access the components discussed above as well as the Locations and Machine managers.

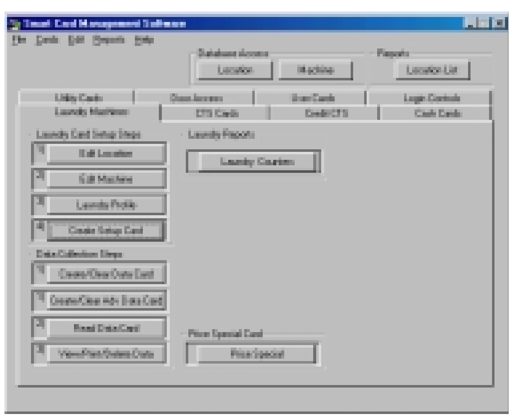

Figure 8.1 The Laundry Machines Manager Interface

8.2. Profiles

8.2.1. Understanding Profiles

The Profiles in the Laundry Machines Manager contain all the administrator-defined specifications of the function and operation for washers, dryers, and stack laundry machines being managed by the SMS2 software. Because SMS2 supports numerous makes and models of laundry machines, there are six different Laundry Profiles and a Price Special Profile to accommodate each machine type. Although each profile is unique, pricing, cycle length and display specifications are generally defined for each machine.

8.2.1.1. Profile Reference Table

Table 8.1 lists each profile type and the machine make that is associated with it. Use this Table to determine which profile is used with the laundry machines in a system.

Table 8.1 Profile Reference Table

Profile	Supported Machine
Retrofit	Maytag Retrofit
	Speed Queen Retrofit
	Continental Retrofit
	Dexter Retrofit
	Wascomat Retrofit
	Whirlpool EMS 1000
	American Dryer Retrofit

(Continued on next page)

(Table 8.1 continued)

Electromechanical Retrofit	Sears W 260516908 Speed Queen W SWT210/211*A Speed Queen W SWT220/221*A Speed Queen W SWT020/221*A Hubesch W HWT120*C Hubesch W HWT110*C Sears D 660051690 Speed Queen D SDE107*F Speed Queen D SDG109*F Speed Queen D SDG 009*A Hubesch D HDE107*F Hubesch D HDG109*F Sears S 2679082990 Speed Queen S SSE107/117*F Speed Queen S SSG109/119*F Hubesch S HSE107/117*F Hubesch S HSG109/119*F
EMS 2000	Whirlpool EMS 2000 (Basic Features)
EMS 2000 Cycle Setup	Whirlpool EMS 2000 (Advanced Cycle Setup)
Maytag Gen 2	Maytag Generation 2 (Basic Features)
Maytag Gen 2 Advanced Setup	Maytag Generation 2 (Advanced Features)
Price Special	Whirlpool EMS 2000

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An asterisk indicates that any character(s) in its place will be supported.

8.2.2. The Laundry Profile Interface

The Laundry Machine Profile record consists of three common components (Figure 8.2):

1. The **Profile List Window** lists all of the profile records in the system.
2. The **Main Body** of the record contains the profile information, which includes a profile name, profile type, pricing information, location restriction and collection specifications.
3. **Command buttons** for the most commonly used features have been included for ease of use.

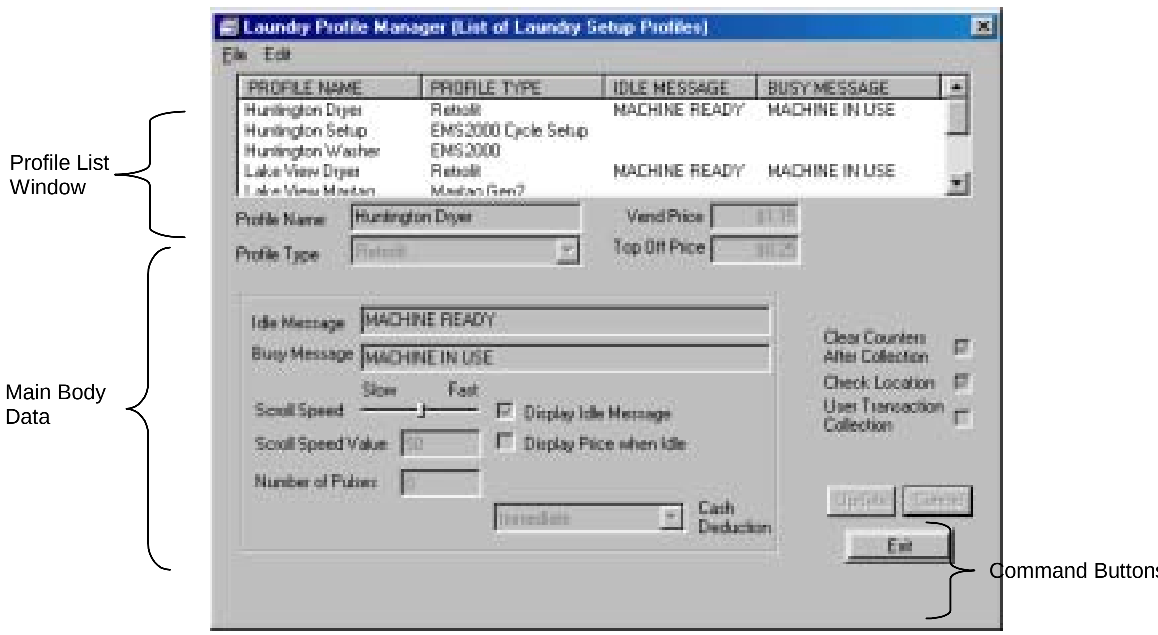

Figure 8. 2 Laundry Profile Record

8.2.3. Common Laundry Profile Elements

Although each profile type is unique, there are some elements associated with most or all of the profiles. The following is an explanation of some of these elements.

8.2.3.1. Idle Message

This message can appear on the Laundry Machine Reader display while the laundry machine is not in operation. Typically a welcome message or instruction is specified. In addition to the Idle Message, the Machine Card Reader has the capability to display the price specified in the profile. During the setup process, choose to display either, both or neither of these messages.

8.2.3.2. Busy Message

This message can appear on some Laundry Machine Reader display when the laundry machine is in use. Typically a message stating that the machine is not available is specified. During the setup process, choose whether or not to display a Busy Message.

8.2.3.3. Scroll Speed

The Scroll Speed field determines the speed that the Idle Message and Busy Message are displayed on the Machine Card Reader. The speed can be set anywhere from 0 to 100. A popular setting for this field is 80.

8.2.3.4. Cash Deduction

There are three styles of operation to deduct value from a Cash Card that can be selected:

- **Immediate** The standard method of operation. When a customer inserts a Cash Card into the Machine Card Reader the card value is shown. After a short delay the new card value (the original value less the vend cost) is shown. When this process is completed a cycle is initiated in the laundry machine when card is removed.
- **Count Down** A Cash Card is inserted into the reader and after the card value is displayed, a count down from 3 to 1 gives customers an opportunity to remove their cash card before the vend cost is deducted.

- **Re-insert** A Cash Card is inserted into a reader and after displaying the card value the customer is prompted to remove and re-insert the Cash Card before the vend cost is deducted and the cycle is initiated in the laundry machine.

8.2.3.5. Clear Counters After Collection

Each Machine Card Reader keeps a transaction record of the laundry machine usage (counters). When collecting this data and viewing it in the form of a report, the ability to see both elapsed and interval counters is available. The "Clear Counters After Collection" option clears only the usage information since the last data collection. When this option is enabled, the viewing of both elapsed and interval counters is possible. If this option is not enabled, the elapsed and interval counters will be identical.

8.2.3.6. Check Location

When this option is enabled, the Machine Card Reader installed on the laundry machine will verify that the Cash Card has been issued (either by a Card Transaction Station or PC) with the correct location identification. If the Location Identification does not match, the transaction will be denied. This option allows the restriction of machine usage to a single location.

8.2.4. Retrofit Profiles

Retrofit Profiles are used to define the function and operation parameters of the following laundry machine types:

- Maytag Retrofit
- Speed Queen Retrofit
- Continental Retrofit
- Dexter Retrofit
- Wascomat Retrofit
- Whirlpool EMS 1000
- American Dryer Retrofit

8.2.4.1. Overview

All of the laundry machines listed above were originally designed to work with a coin-drop unit. Coin-drop operated laundry machines are already equipped with an advanced electronic or computerized circuitry to identify and verify that the correct coins are passing through the coin-drop unit. This is accomplished with a special sensor that is located in the coin-drop unit and is integrated with the circuitry of the laundry machine. When coins are dropped, the sensor measures the time it takes the coin to drop through it and the circuitry in the laundry machine verifies time duration of the drop. When a coin is accepted the sensor will then send a signal to the laundry machine called a pulse.

The Greenwald Intellicard System integrates with these laundry machines, by simulating coin pulses with a relay installed on the Machine Card Reader.

It is important to understand that the main functions of the Machine Card Readers in these machine types is to display a price for customers, deduct the vend cost from their Cash Card, and send the number of pulses specified to the machine. For example, a laundry machine may start with four pulses for a regular cycle (typically a value of one dollar), and set the Greenwald Intellicard System to charge $1.25 or even have variable pricing according to the time of day. As long as the laundry machine is set to start with four pulses and the profile specifies a four pulse start, the machine will operate at any set price.

Since these machines are equipped with electronic or computerized logic, they may have advanced features built in such as variable cycle settings.

In order to use these features, they must be programmed in the laundry machine as specified by the machine's manufacturer.

8.2.4.2. The Retrofit Profile Interface

Table 8.2 describes each field and its restrictions in the Retrofit Profile (Figure 8.3).

Table 8.2 Retrofit Profile

Field Name	Description	Restrictions
Profile Name	Required field creating an identity for the profile. The software will use this identification in reports, machine setup, and card creation.	Any alphanumeric combination up to 30 characters in length
Profile Type	Defines type of profile.	Drop-down menu, select "Retrofit"
Vend Price	Price to begin normal cycle.	Currency field
Top Off Price	Price to initiate a top off cycle.	Currency field
Idle Message	Message to scroll on smart card reader display when machine is not in use	Up to 30 character (capitalized letters only)
Busy Message	Message to scroll on smart card reader display while machine is in use.	Up to 30 character (capitalized letters only)
Scroll Speed/Value	Scroll speed is a visual representation of the scroll value for messages displayed on the smart card reader display.	Range is between 0 to 100. Software defaults to 50.
Number of Pulses	Determines the number of pulses to send to machine for a full vend (normal cycle). Top off vends (for dryers) are automatically set to one pulse.	Numerical Field
Display Options	Allows operator to specify whether to display the idle message, the price, or both when machine is idle.	Two separate check-boxes, one, both, or neither can be activated
Cash Deduction	Selects the cash deduction style for the user interface.	Drop-down menu
Clear Counters after Collection	Enabling this option will clear the interval counters when collecting data.	Check Box
Check Location	Activates or deactivates the Check Location option.	Check Box
User Transaction Collection	Enables user transaction collection in readers equipped with the User Transaction Data Collection Dallas Stick.	Check Box

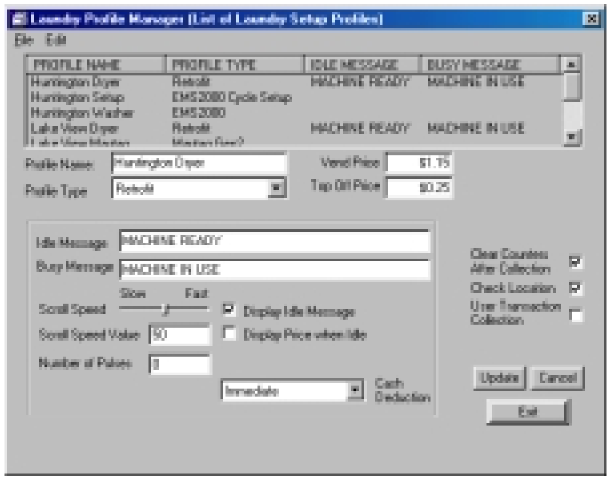

Figure 8.3 Retrofit Profile

8.2.5. Electromechanical Retrofit Profiles

Electromechanical Retrofit Profiles are used to define the function and operation parameters of the following laundry machine types:

- Sears W 260516908
- Speed Queen W SWT210/211*A
- Speed Queen W SWT220/221*A
- Speed Queen W SWT020/221*A
- Hubesch W HWT120*C
- Hubesch W HWT110*C
- Sears D 660051690
- Speed Queen D SDE107*F
- Speed Queen D SDG109*F
- Speed Queen D SDG 009*A
- Hubesch D HDE107*F
- Hubesch D HDG109*F
- Sears S 2679082990
- Speed Queen S SSE107/117*F
- Speed Queen S SSG109/119*F
- Hubesch S HSE107/117*F
- Hubesch S HSG109/119*F

*
An asterisk indicates that character(s) in its place will be supported.

8.2.5.1. Overview

Electromechanical Retrofit machines are washers and dryers designed to work with a coin-chute and an electromechanical timer. The timer is equipped with one or more switches to signal the laundry machine to start or stop a cycle. When a customer actuates the coin-chute it physically engages the electromechanical timer initiating its cycle.

The Greenwald Intellicard System integrates with these laundry machines by replacing the entire coin-chute and timer system with the Machine Card Readers that utilize internal relay switches to signal the laundry machines.

8.2.5.2. The Electromechanical Retrofit Profile Interface

Table 8.3 describes each field and its restrictions in the Electromechanical Retrofit Profile (Figure 8.4).

Table 8.3 Electromechanical Profile Fields

Field Name	Description	Restrictions
Profile Name	Required field creating an identity for the profile. The software in reports, machine setup, and card creation will use this identification.	Any alphanumeric combination up to 30 characters
Profile Type	Defines type of profile.	Drop-down menu, select "Electromechanical"
Vend Price	Price to begin normal cycle.	Currency field
Top Off Price	Price to initiate a top off cycle.	Currency field
Idle Message	Message to scroll on smart card reader display when machine is not in use	Up to 30 character (capitalized letters only)
Busy Message	Not applicable on Electromechanical machines.	
Scroll Speed/Value	Scroll speed is a visual representation of the scroll value for messages displayed on the smart card reader display.	Range is between 0 to 100. Software defaults to 50.
Dryer Run Time	Time duration of dryer cycle with normal vend.	Numerical Field
Heat Time	Portion of Dryer Run Time that will be heated (be sure to consult dryer manual to determine correct Run Time to Heat Time Ratio).	Numerical Field
Top Off Time	Dryer cycle time duration for Top Off vend.	Numerical Field
Display Options	Allows operator to specify whether to display the idle message, the price, or both when machine is idle.	Two separate check-boxes, one, both, or neither can be activated
Cash Deduction	Cash deduction method for the user interface.	Drop-down menu
Clear Counters after Collection	Activates or deactivates the clear counter option.	Check Box
Check Location	Activates or deactivates the Check Location option.	Check Box
User Transaction Collection	Enables user transaction collection in readers equipped with the User Transaction Data Collection Dallas Stick.	Check Box

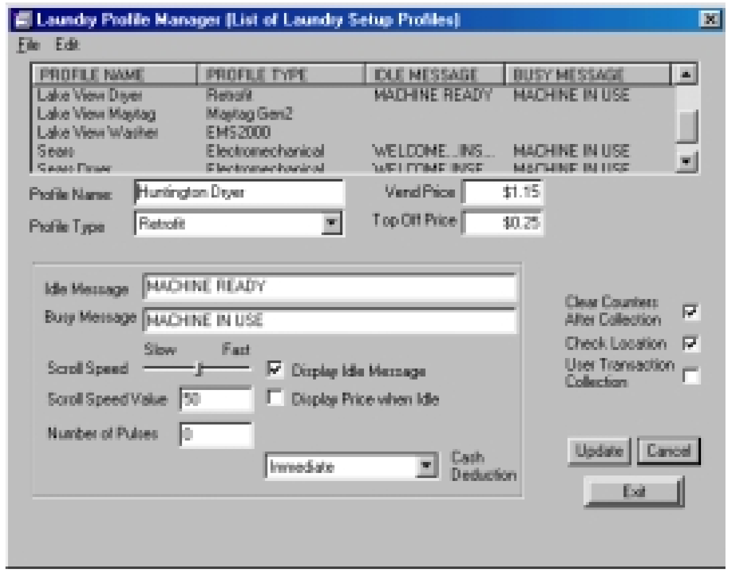

Figure 8.4 Electromechanical Retrofit Profile

8.2.6. EMS 2000 Profile

The Whirlpool EMS 2000 washer and dryer series is a card-ready system. These machines already come equipped with smart card readers. Most functions are set through the machine interface (see EMS 2000 Owner's Manual), but the SMS2 software sets pricing and dryer run time.

Table 8.4 describes each field and its restrictions in the EMS 2000 Profile (Figure 8.5).

Table 8.4 EMS 2000 Profile Record

Field Name	Description	Restrictions
Profile Name	Required field creating an identity for the profile. The software in reports, machine setup, and card creation will use this identification.	Any alphanumeric combination up to 30 characters
Profile Type	Defines type of profile.	Drop-down menu, select "EMS 2000"
Vend Price	Price to begin normal cycle.	Currency field
Top Off Price	Price to initiate a top off cycle.	Currency field
Dryer Run Time	Time duration of dryer cycle with normal vend.	Numerical Field
Heat Time	Portion of Dryer Run Time that will be heated is set automatically by software according to Whirlpool specifications	Software Defined
Top Off Time	Dryer cycle time duration for Top Off vend.	Numerical Field
Clear Counters after Collection	Activates or deactivates the clear counter option.	Check Box
Check Location	Activates or deactivates the Check Location option.	Check Box
User Transaction Collection	Not Applicable for EMS 2000.	Check Box

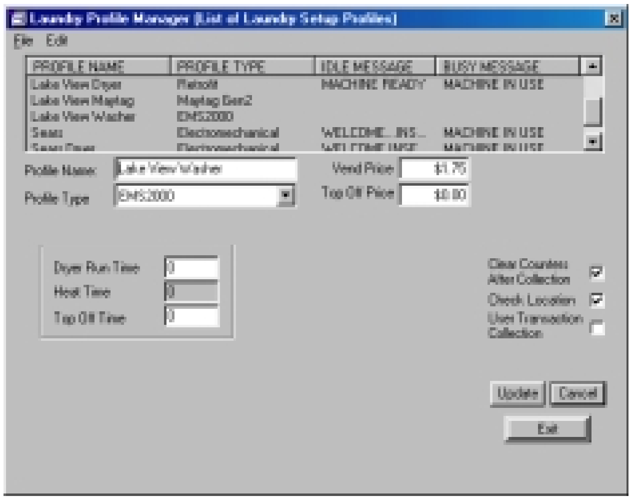

Figure 8.5 EMS 2000 Profile

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8.2.8. Maytag Gen2 Profile

Maytag Gen2 machines (PR series) are card ready. They can be managed by SMS2. In this profile only basic features such as pricing, washer cycle length, rinse length and dyer time are defined. However, for ease of operation the Maytag Gen2 Advanced profile can be used instead of programming with the MEQ Maytag Machine Programmer. Table 8.7 describes each field and its restrictions.

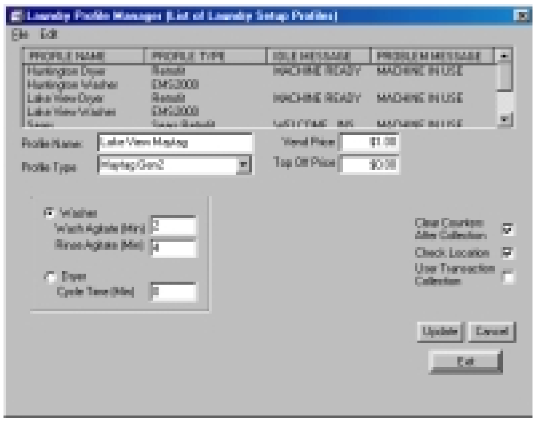

Figure 8.7 Maytag Gen2 Setup Profile

Table 8.7 Maytag Gen2 Profile Record Fields

Field Name	Description	Restrictions
Profile Name	Required field creating an identity for the profile. The software will use this identification in machine setup, and card creation.	Any alphanumeric combination up to 30 characters
Profile Type	Defines type of profile.	Drop-down menu, select "Maytag Gen2"
Vend Price	Price to begin normal cycle.	Currency field
Top Off Price	Price to initiate a top off cycle.	Currency field
Washer Option	Select this option for use with washers. Includes user defined wash agitate and rinse agitate cycle length.	Check box with two numerical fields for cycle lengths
Dryer Option	Select this option for use with dryers. Includes user defined dryer cycle time.	Check box with a numerical field for dryer run time
Clear Counters after Collection	Activates or deactivates the clear counter option.	Check Box
Check Location	Activates or deactivates the Check Location option.	Check Box
User Transaction Collection	Enables user transaction collection in readers equipped with the User Transaction Data Collection Dallas Stick.	Check Box

8.2.9. Maytag Gen2 Advanced Profile

In this profile, all features and functions available to the Maytag Gen2 series of laundry equipment can be managed. Please refer to the Maytag Gen2 Advanced Feature (Section 8.5.1).

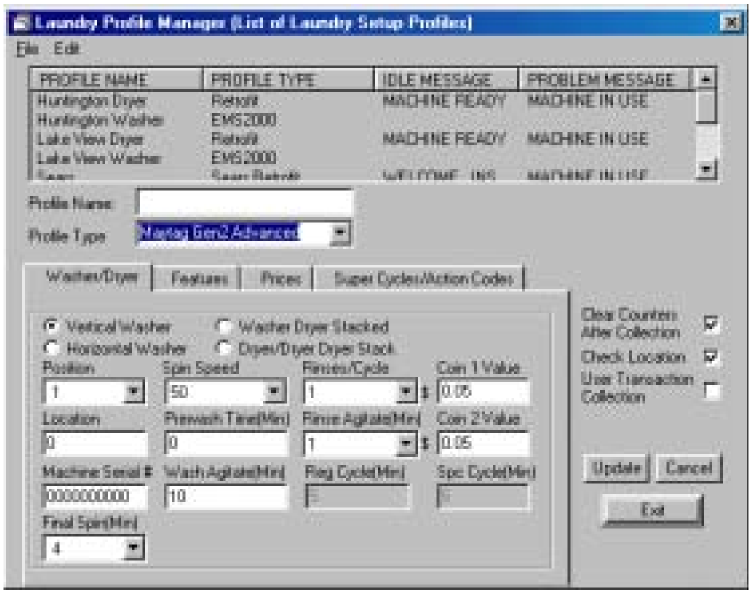

Figure 8.9 Maytag Gen2 Advanced Profile

Table 8.8 Maytag Gen2 Advanced Profile Record Fields

Field Name	Description	Restrictions
Profile Name	Required field creating an identity for the profile. The software in machine setup, and card creation will use this identification.	Any alphanumeric combination up to 30 characters
Profile Type	Defines type of profile.	Drop-down menu, select “Maytag Gen2 Advanced”
Advanced Features Tabs	A series of advanced options designed to meet Maytag specifications (Section 8.5.1)	Series of four tabs with multiple check boxes and drop-down menus
Clear Counters after Collection	Activates or deactivates the clear counter option.	Check Box
Check Location	Activates or deactivates the Check Location option.	Check Box
User Transaction Collection	Enables user transaction collection in readers equipped with the User Transaction Data Collection Dallas Stick.	Check Box

8.2.10. Working with the Laundry Profiles

8.2.10.1. Adding a Laundry Profile

1. In the Laundry Machine tab, click the Laundry Profile button (Figure 8.9).
2. Select Add New Profile from the Edit drop-down menu.
3. Enter/select data into the appropriate fields (See Tables 8.3 – 8.9)
4. Verify that all information is correct and click the Update button to save the new record.

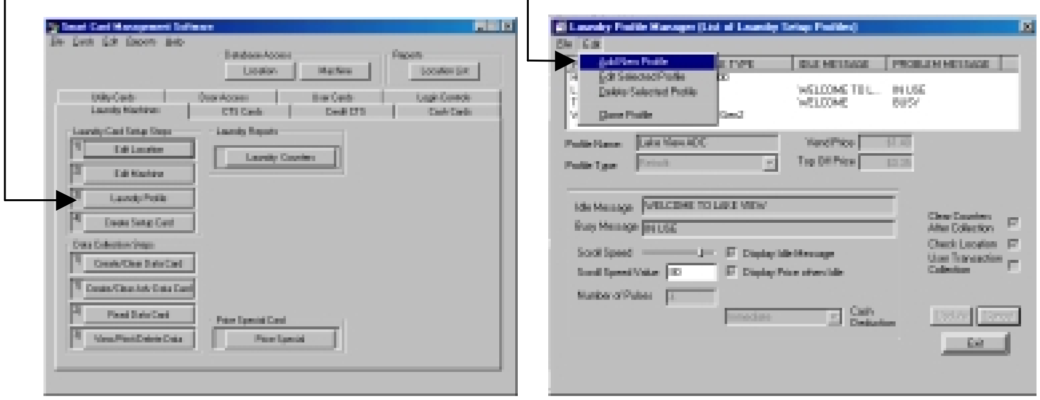

Figure 8.9 Creating a Laundry Profile

8.2.10.2. Editing a Laundry Profile

1. In the Laundry Machine tab, click the Laundry Profile button (Figure 8.9).
2. Click the profile to edit from the Laundry Profile List Window (Figure 8.10).
3. Select Edit Selected Profile from the Edit Drop-down menu (Figure 8.10).

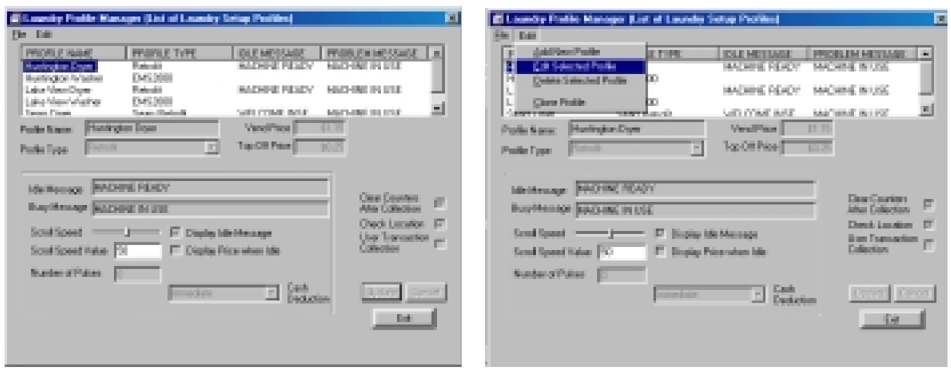

Figure 8.10 Editing Retrofit Profile

Tech Tip

Time Saving Shortcut – Double click Profile to be edited in the Profile List Window and skip steps 2 and 3.

---

4. Enter necessary changes.
5. Verify that the new information is accurate, and click the Update button to save changes.

8.2.10.3. Deleting a Laundry Profile

1. In the Laundry Machine tab, click the Laundry Profile button (Figure 8.9).
2. Click the profile to delete from the Profile List Window (Figure 8.11).
3. Select Delete Selected Profile from the Edit drop-down menu (Figure 8.11).

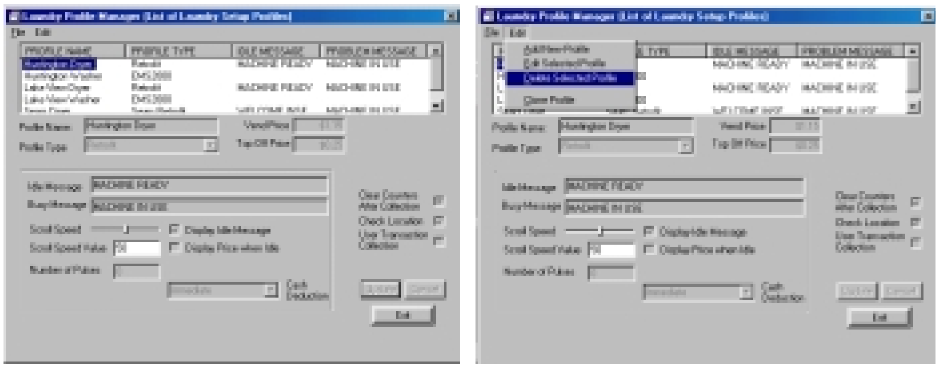

Figure 8.11 Deleting a Laundry Profile

4. A message will appear to verify deletion of selected Profile, click the Yes button to proceed with deletion of machine or the No button to cancel.

Warning!

Once a profile is deleted it cannot be retrieved. Be sure that the profile being deleted will not be needed anymore for machine setup.

8.2.10.4. Cloning a Laundry Profile

The cloning feature has been included with SMS2 as a time saving feature for adding multiple profiles with similar information.

The cloning feature allows the system operator to copy all the information for an existing profile in the database except for the Profile Name field. Once a profile is cloned, the operator enters a new Profile Name, and the new Machine information is saved as a new record.

1. In the Laundry Machine tab, click the Laundry Profile button (Figure 8.9).
2. Click the profile to clone in the Profile List Window (Figure 8.12).
3. Select Clone Profile from the Edit drop-down menu (Figure 8.12).

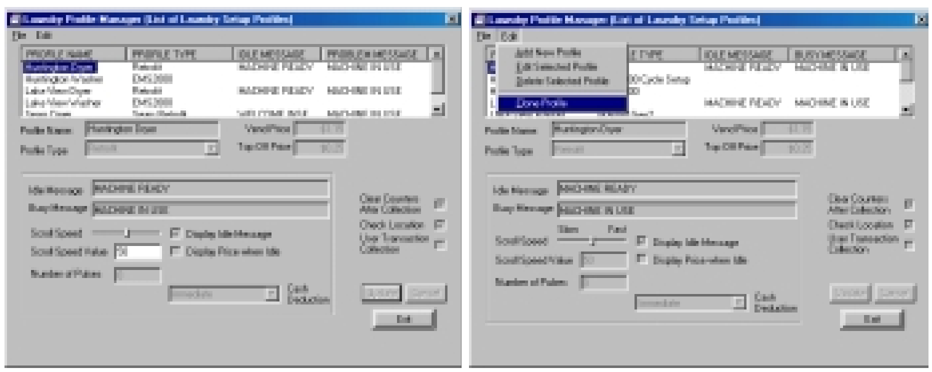

Figure 8.12 Cloning a Laundry Machine

4. Enter new machine identification in the Machine ID Record (Figure 8.13).
5. Click the Update button to save new machine record (Figure 8.13).

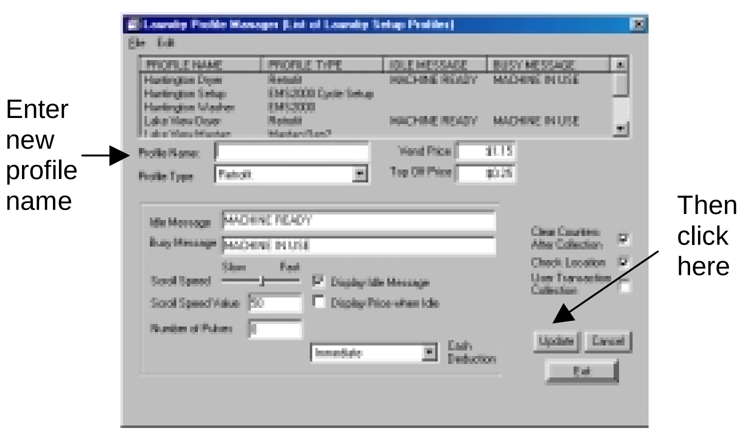

Figure 8.13 Completing the Cloning Process

8.2.11. Working with Price Special Profiles

SMS2 allows for special pricing and functions based on the time of day and the day of the week. Price Special Profiles can be used for discounts during off hours or premium pricing at peak use. Additionally, this feature can be used to disable machines at a specified times.

The Laundry Machines Manager allows you to define any number of Price Special Profiles and to create cards to program this information into the Machine Card Readers. This feature can only be used on laundry machines that have already been programmed.

To setup a Price Special Profile:

1. Create a Profile
2. Define up to twenty-three specials within the profile.
3. Create a Price Special Card to program the machine with.

8.2.11.1. Opening the Price Special Profiles Window

To open the Price Special Profiles Window click the Price Special button in the Laundry Machines Manager (Figure 8.14).

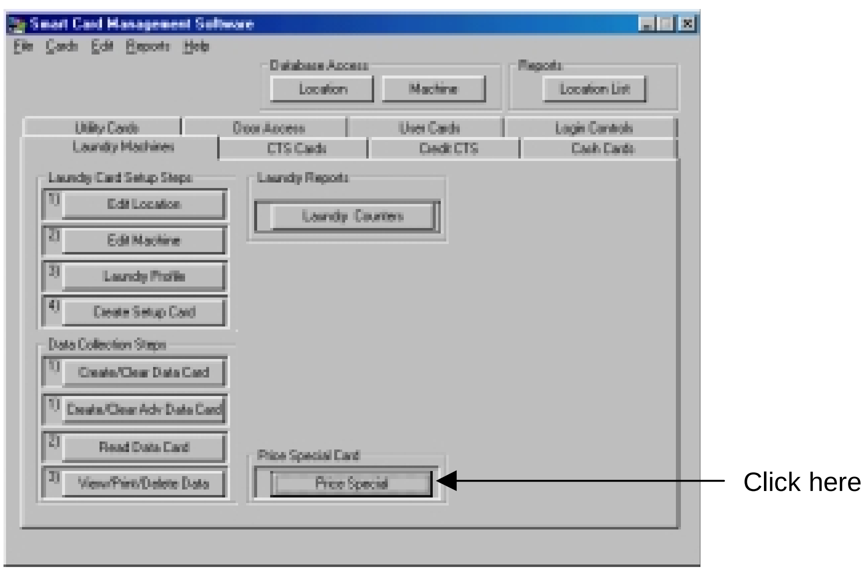

Figure 8.14 Opening the Price Special Profiles Window

8.2.11.2. The Price Special Profiles Window Interface

The Price Special Profiles window consists of five basic components (Figure 8.15):

1. The **Profile List Window** displays all the profiles entered into the software.
2. The **Profile Information** section contains the profile's default pricing information.
3. The **Special List Window** displays all the specials of a selected profile.
4. The **special information** section contains the day, time and specifications of the selected special.
5. **Function and command buttons** for the most commonly used features have been included for ease of use.

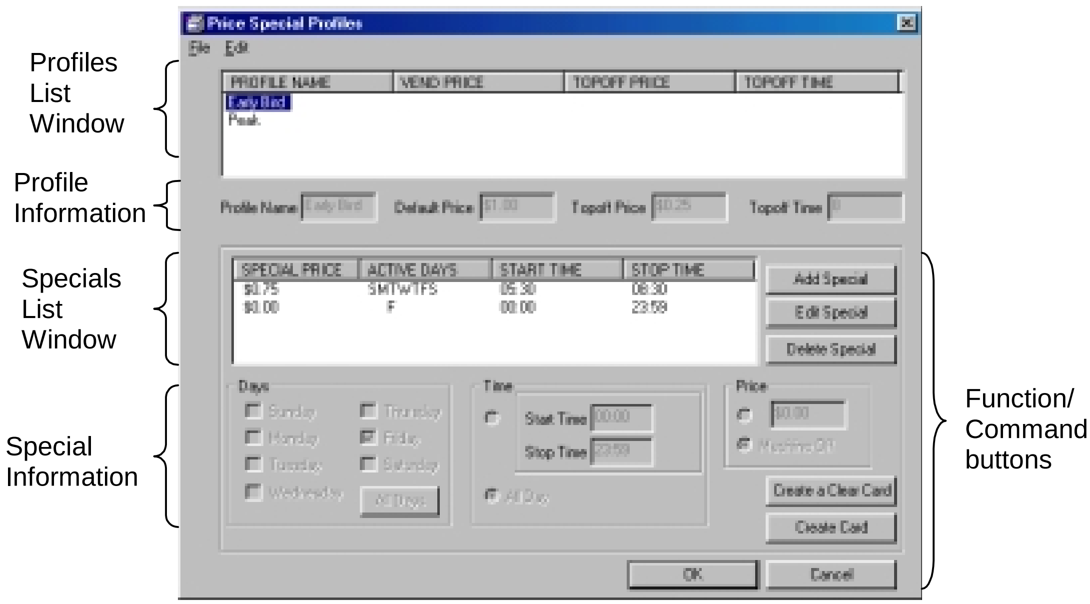

Figure 8.15 The Price Special Profiles Interface

8.2.11.3. Adding a Price Special Profile

1. In the Price Special Profile window select Add Profile from the edit drop-down menu (Figure 8.16).

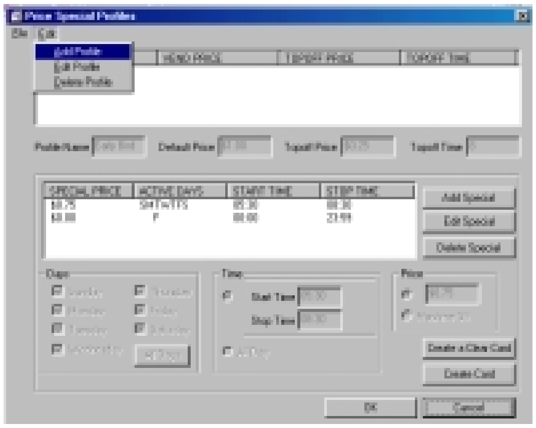

Figure 8.16 Adding a Profile

2. Enter a profile name, the default price (price when no special is in effect), Top Off price and time (for dryers only)(Figure 8.17).
3. Click the Update button (Figure 8.17).

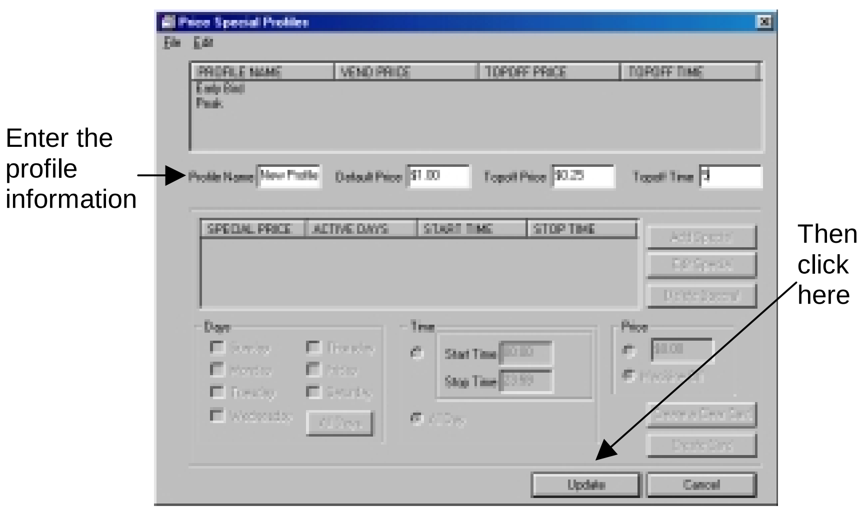

Figure 8.17 Entering the Profile Information

8.2.11.4. Editing a Price Special Profile

1. In the Price Special Profile window select the Profile to edit from the Profiles List Window (Figure 8.18).
2. Select Edit Profile from the edit drop-down menu (Figure 8.18).

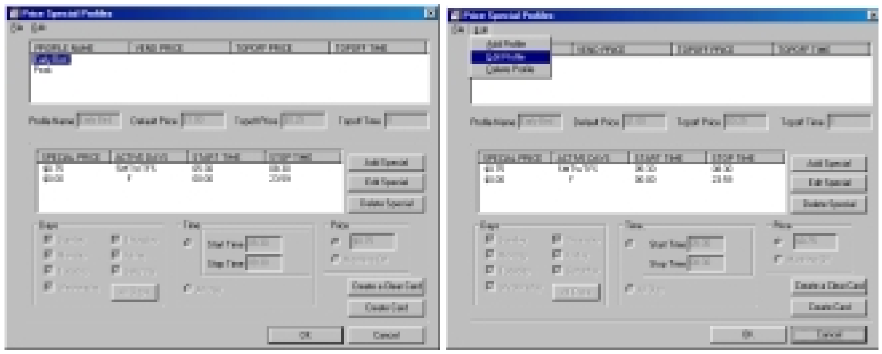

Figure 8.18 Editing a Profile

3. Edit the profile information: profile name, default price (price when no special is in effect), Top Off price and time (for dryers only)(Figure 8.19).
4. Click the Update button (Figure 8.19).

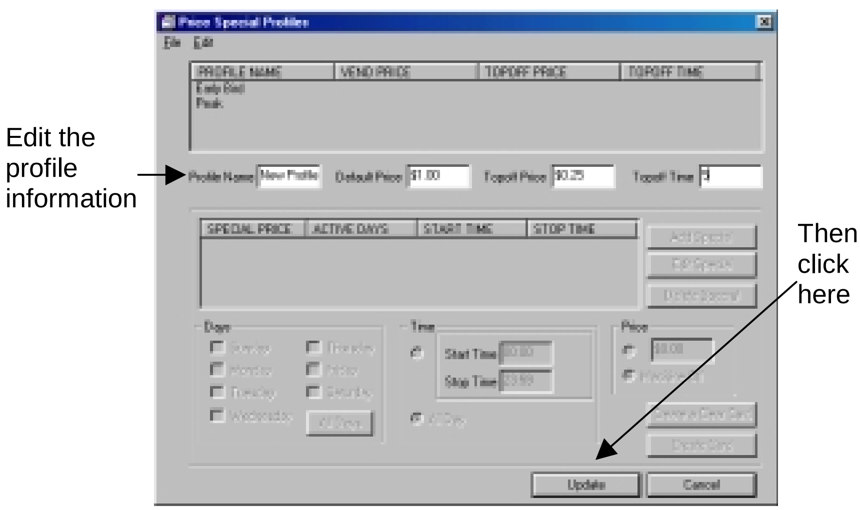

Figure 8.19 Editing the Profile Information

8.2.11.5. Deleting a Price Special Profile

Warning!

A deleted Price Special Profile cannot be recovered.

1. In the Price Special Profile window select the Profile to edit from the Profiles List Window (Figure 8.20).
2. Select Delete Profile from the edit drop-down menu (Figure 8.20).

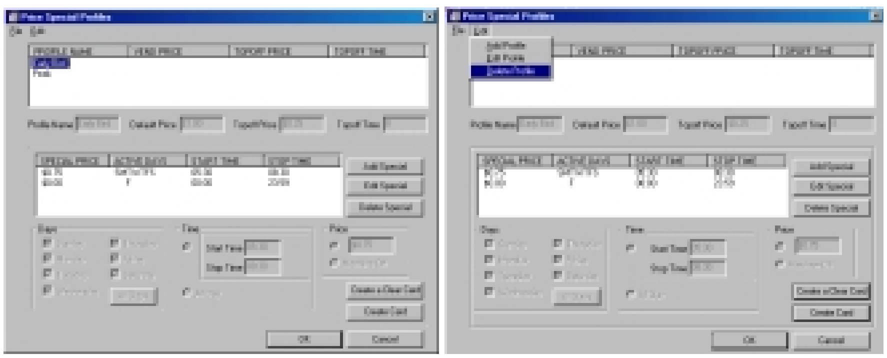

Figure 8.20 Deleting a Price Special Profile

8.2.11.6. Adding a Special

1. Select a Profile from the list to add a Special to (Figure 8.21).
2. Click the Add Special button (Figure 8.21).

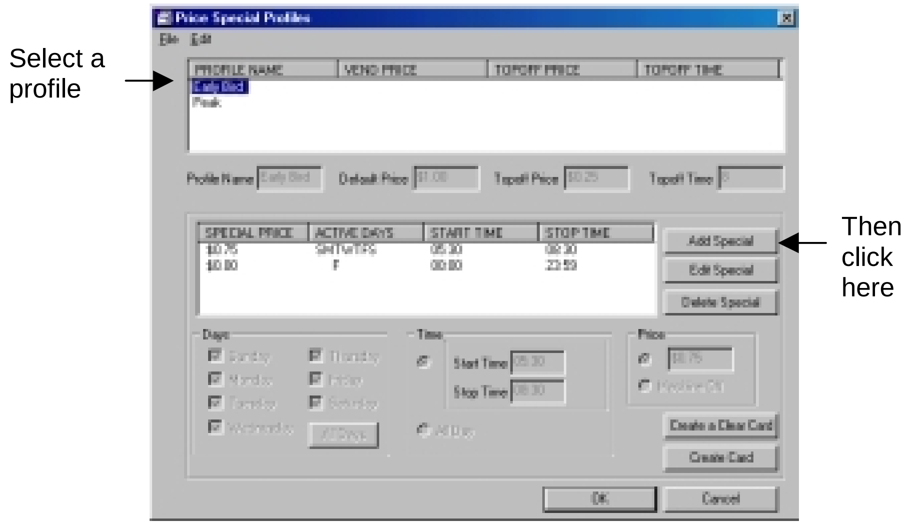

Figure 8.21 Adding a Special

3. Enter the Special Information (Figure 8.22):
   - Select the days for Special to apply (click the All days button to select all the day of the week).
   - Enter the Start and Stop time of the special or select All Day.
   - Enter the price for the special or select Machine Off for machine to be off during the days and times specified.
4. Click the Update button (Figure 8.22)

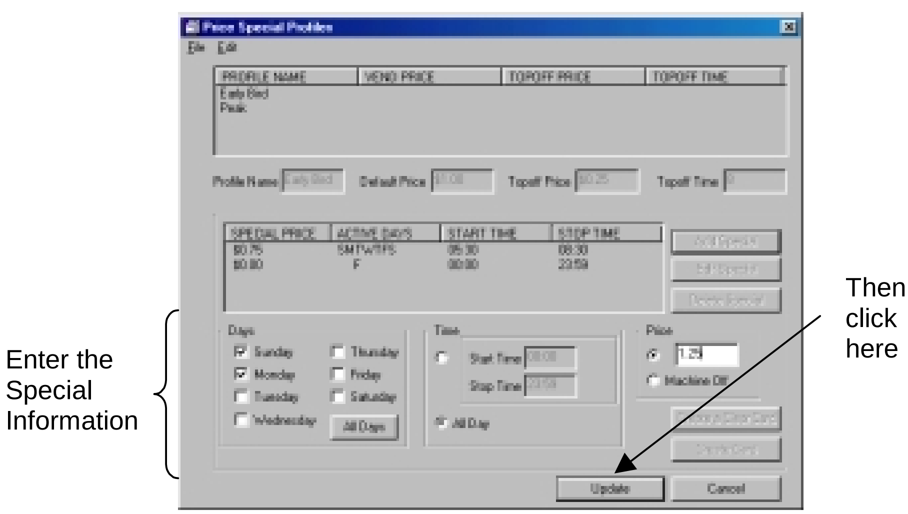

Figure 8.22 Entering the Special Information

8.2.11.7. Editing a Special

1. Select a Profile containing the Special to edit from the Profiles List Window (Figure 8.23).
2. Select the Special to edit (Figure 8.23).
3. Click the Edit Special button (Figure 8.23).

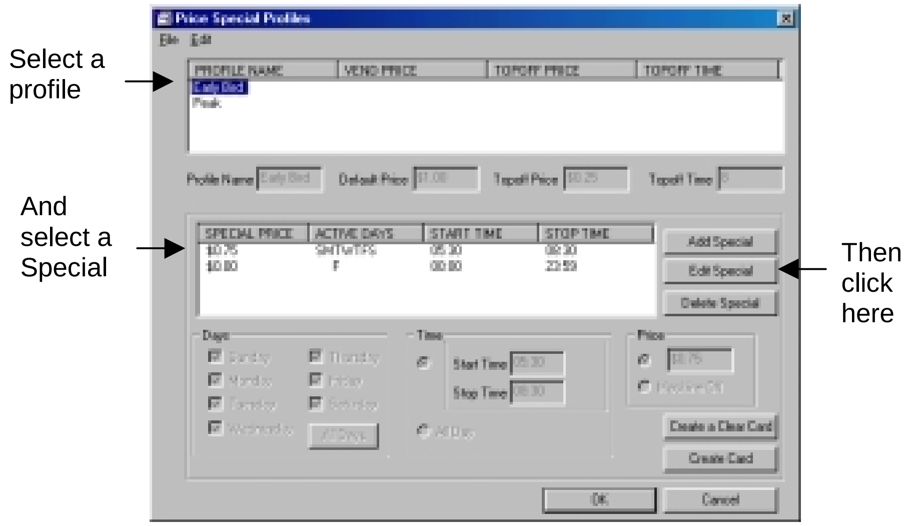

Figure 8.23 Editing a Special

4. Make changes to the Profile information (Figure 8.24).
5. Click the Update button (Figure 8.24)

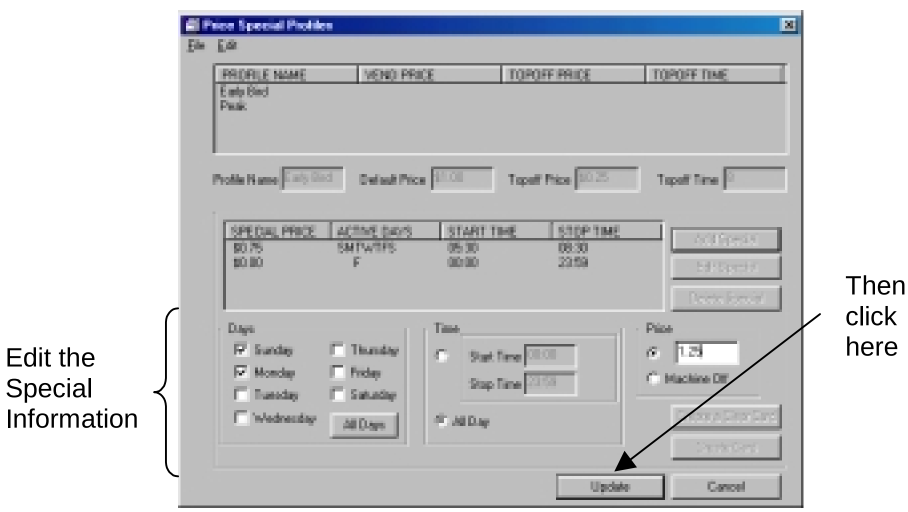

Figure 8.24 Editing the Special Information

8.2.11.8. Deleting a Special

Warning!

A deleted special cannot be recovered

1. Select the Profile containing the Special to delete from the Profiles List Window (Figure 8.25).
2. Select the Special to delete (Figure 8.25).
3. Click the Delete Special button (Figure 8.25).

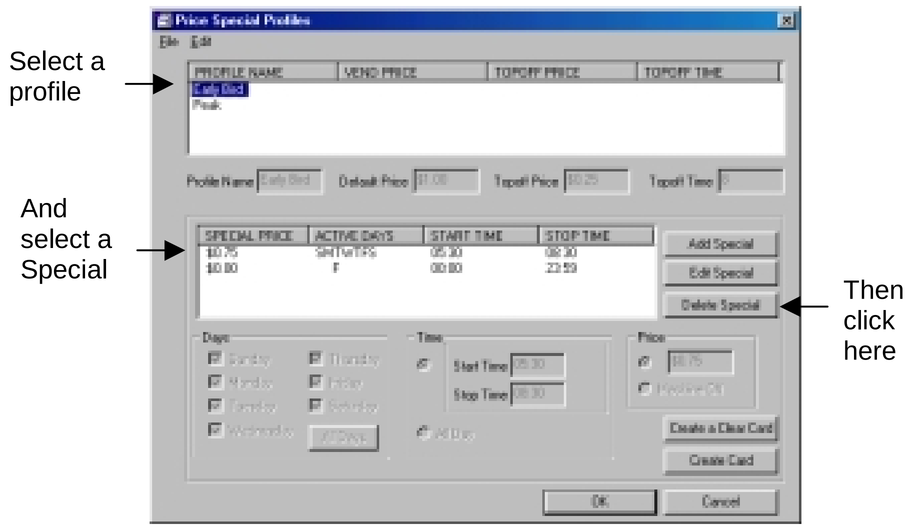

Figure 8.25 Deleting a Special

8.2.11.9. Creating a Price Special Card

1. In the Price Special Profile window select a profile to create a card for from the Profiles List Window (Figure 8.26).
2. Insert a Management Card into the PC Reader (Section 2.4.2).
3. Click the Create Card button. (Figure 8.26).

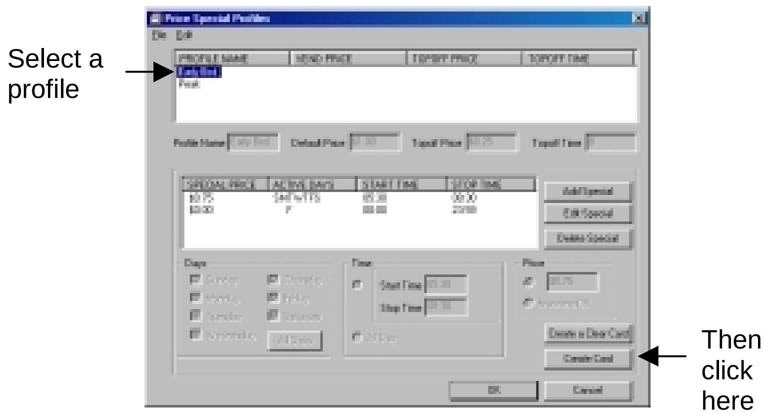

Figure 8.26 Creating a Price Special Card

8.2.11.10. Creating a Clear Price Card

A Clear Card is used to clear the Price Specials once they have been programmed into a Laundry Machine Reader.

1. Insert a Management Card into the PC Reader (Section 2.4.2).
2. Click the Create a Clear Card button (Figure 8.27).

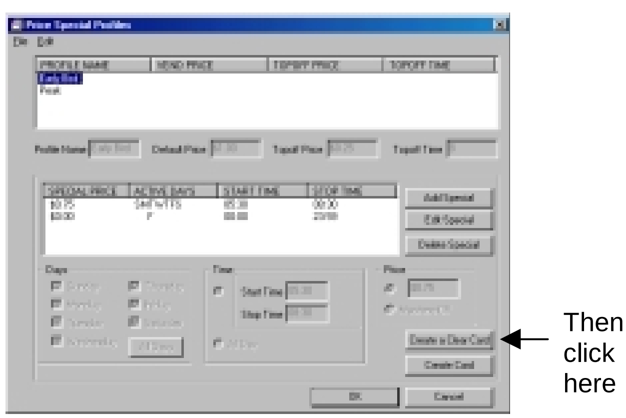

Figure 8.27 Creating a Clear Card

8.3. Laundry Setup Cards

Once the location, machine and profile information have been entered, you are ready to create a setup card.

The card creation is accomplished in the Laundry Setup Card window. This window is comprised of three parts (Figure 8.28):

1. In the select machine ID and Location ID section, select which laundry machine type and at what location to program (machine setup is discussed in chapter 7). Additionally, an option to sort by location is available and may be needed for users who have many facilities.
2. In the Select Profile section, choose from a list of profiles.
3. In the last section of the Laundry Setup Card Window, the card programming process is completed.

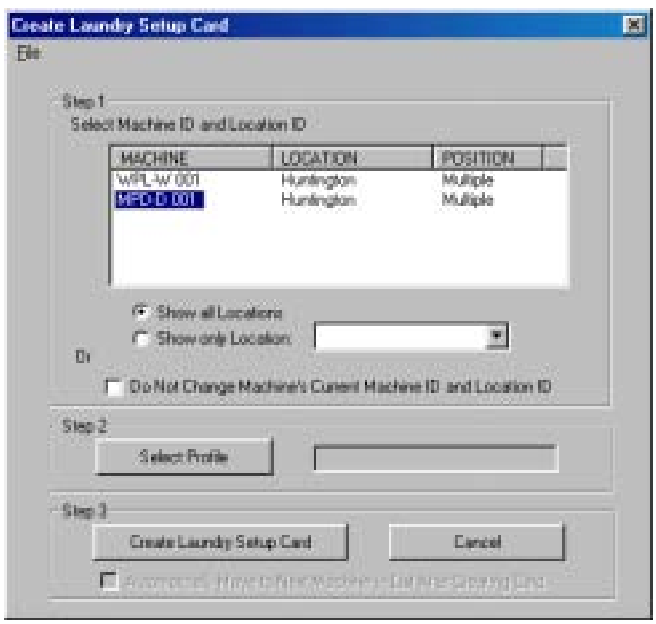

Figure 8.28 Create CTS Setup Card Window

8.3.1. Creating a Laundry Setup Card

1. In the Laundry Machines tab, click the Create Setup Card button (Figure 8.29).

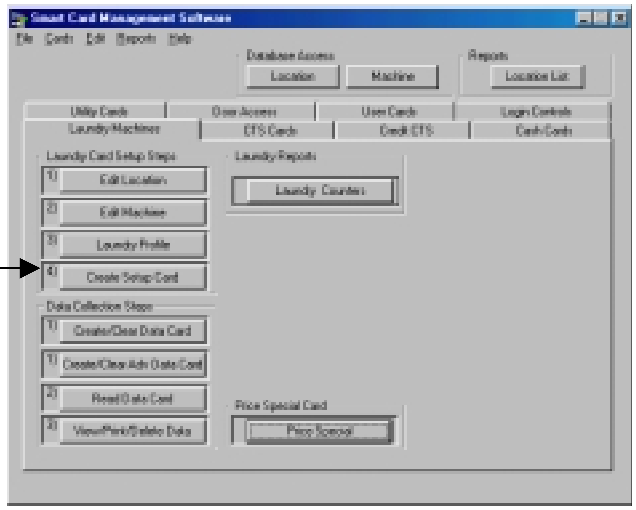

Figure 8.29 Creating a Laundry Setup Card

2. Select a Machine ID with a corresponding Location ID by clicking on it. There are two ways to view the machines in the database (Figure 8.30):
    a. Click “Show all Locations” and view the entire list of machines.
    b. Click “Show only Location” and use the drop-down menu to view only machines from the selected locations
3. Click the Select Profile button (Figure 8.30).

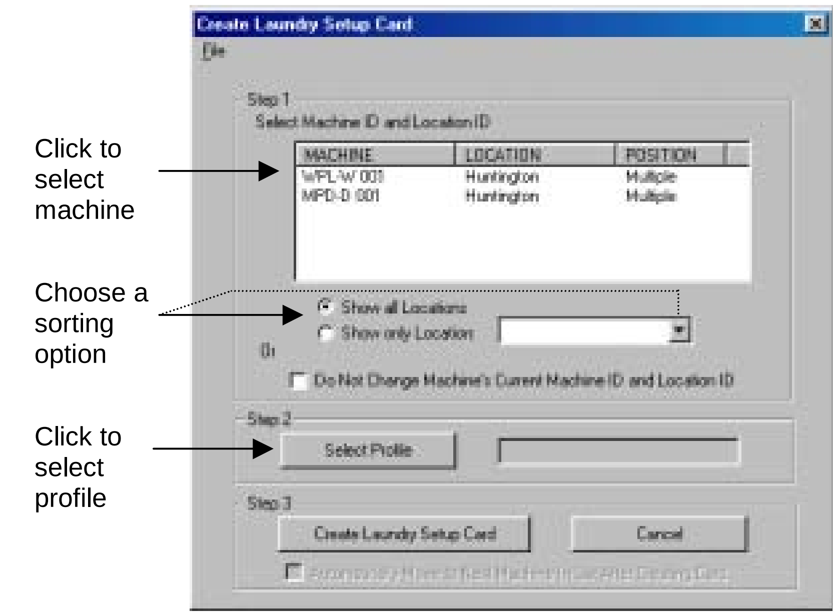

Figure 8.30 Laundry Setup Card Creation Steps

4. Select profile from Profile List Window (Figure 8.31).
5. Review to verify that the profile information is correct, and click the Select button (Figure 8.31).

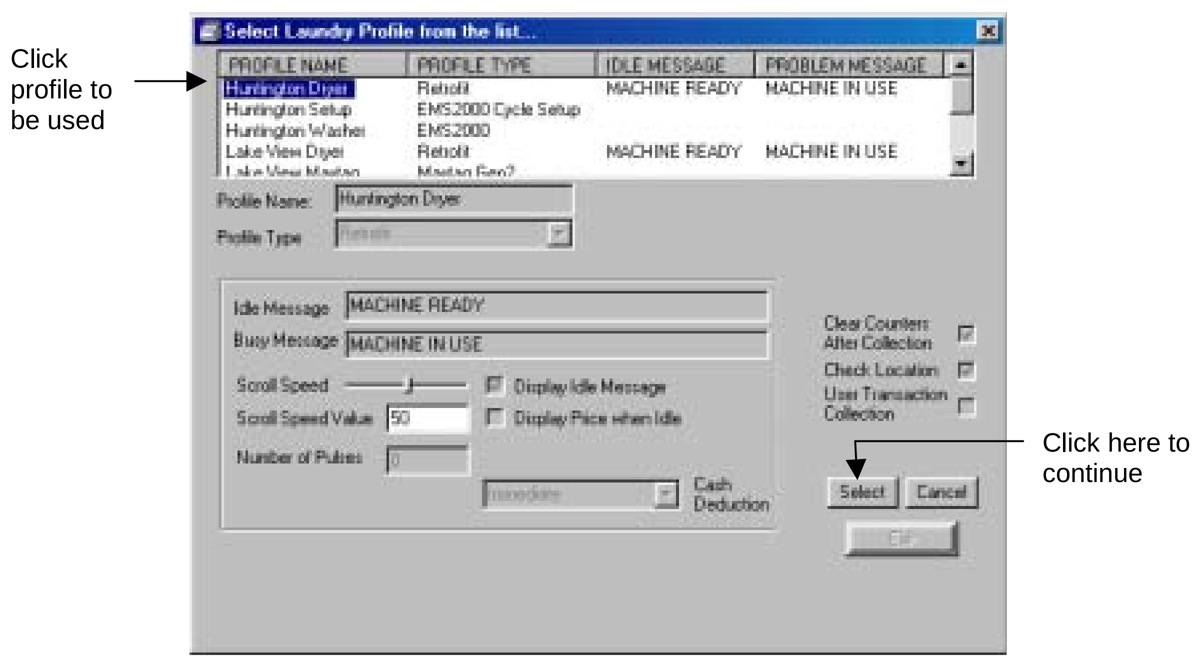

Figure 8.31 Selecting a Laundry Machine Profile

6. Insert a management smart card into the PC reader (Section 2.4.2.) and click the Create Laundry Setup Card button (Figure 8.32).

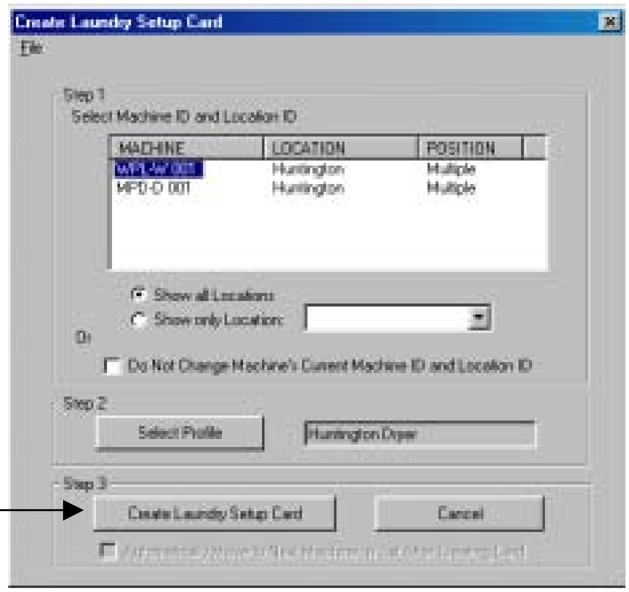

Figure 8.32 Creating the Laundry Machine Setup Card

Note:
If multiple machines are to be setup using the same profile, select the “Automatically Move to the Next Machine In List After Card Creation” option. This will automatically go to the next machine on the list and save time. Be sure to use a different management card each time.

8.4. Reports

The Laundry Machines Manager can generate laundry Machine Counter reports. There are numerous advanced reports for the Maytag Gen2 series of laundry machines described in Section 8.5.2.

The process for generating the reports is as follows:

1. Create a Data Collection Card
2. Collect data from machine
3. Read Data Card
4. View or print the report

8.4.1. Creating a Data Collection Card

1. Insert a management card into the PC Reader (Section 2.4.2).
2. In the Laundry Machines tab, click one of the following (Figure 8.33):
    a. Click the Create Data Card button to collect standard reports from all machines.
    b. Click the Create Adv Data Card button to collect advanced reports in the Maytag Gen2 machines.

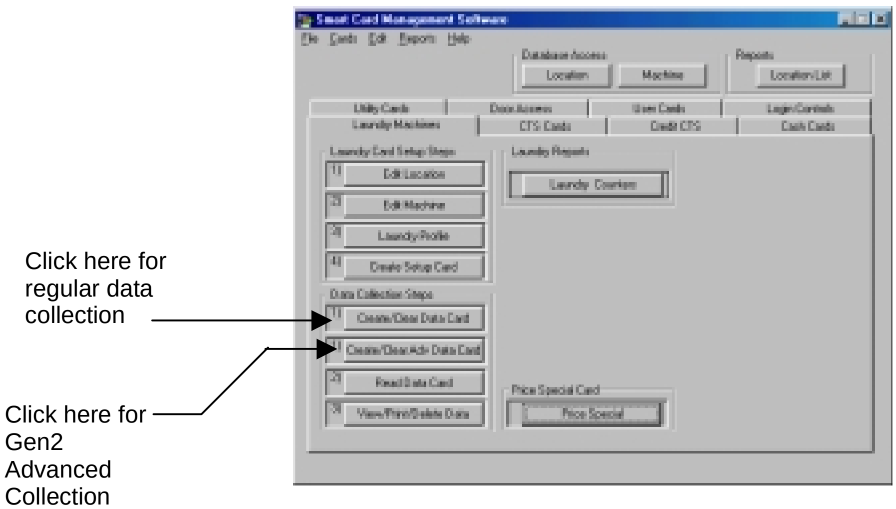

Figure 8.33 Creating a Laundry Machine Data Collection Card

8.4.2. Collecting Data from a Machine

To collect data from a laundry machine, insert the card into the machine reader and remove it when prompted by the display.

8.4.3. Reading a Data Card

1. Insert a data card with collection information into the PC reader (Section 2.4.2.).
2. In the Laundry Machines tab, click the Read Data Card button (Figure 8.34).

Click here to read the Data Collection Card

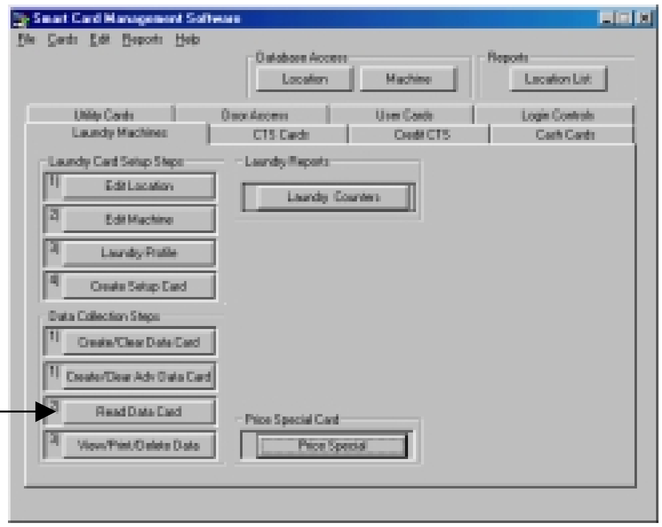

Figure 8.34 Reading a Laundry Machine Data Collection Card

3. Select an option to show all the data collections on the card or only data that has not been saved to the database then click the Read Machine Collection Card button (Figure 8.35).

Select viewing option

Then click here

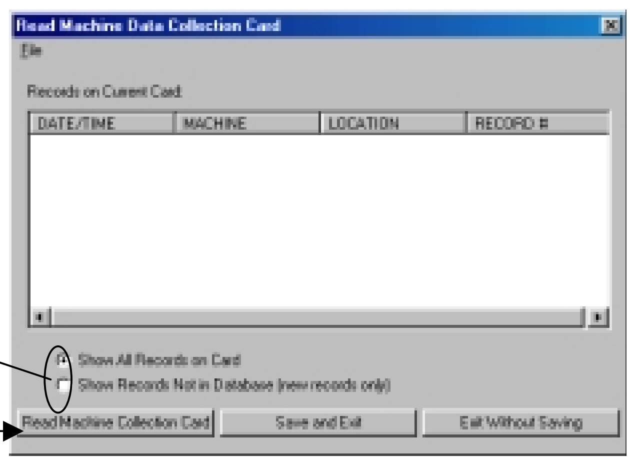

Figure 8.35 Reading the Data Collection Card

4. The Read Machine Data Collection Card window will open and list all the User data collections on the card. Select which records to save. Select the Save Selected Records from the File drop-down menu or click the Save and Exit button to save all records (Figure 8.36).

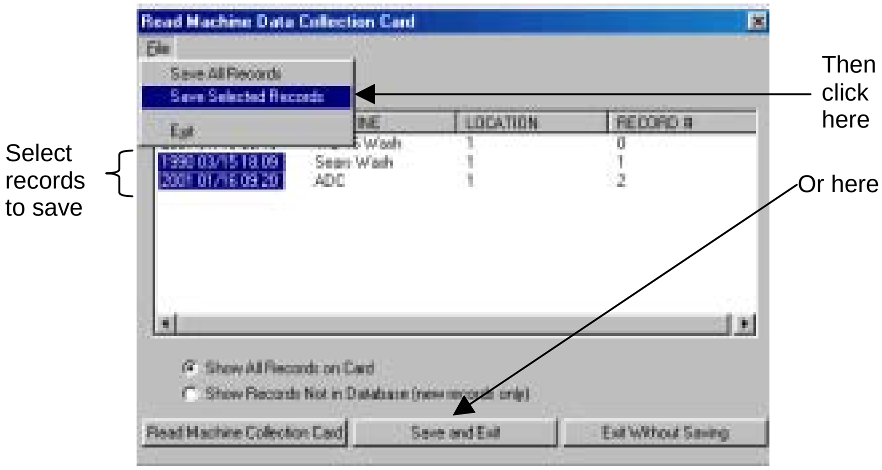

Figure 8.36 Saving the Collection Records

5. Double-clicking on a collection record listed in the Read User Data Collection Card window will open a window containing the Transaction Information, Machine ID, Location and Collection Date/Time of that record.

8.4.4. Viewing and Printing Reports

1. Click the Laundry Counters button in the Laundry Machines Manager for that report or select any other desired report from the Laundry sub menu of the Reports drop-down menu (Figure 8.37).

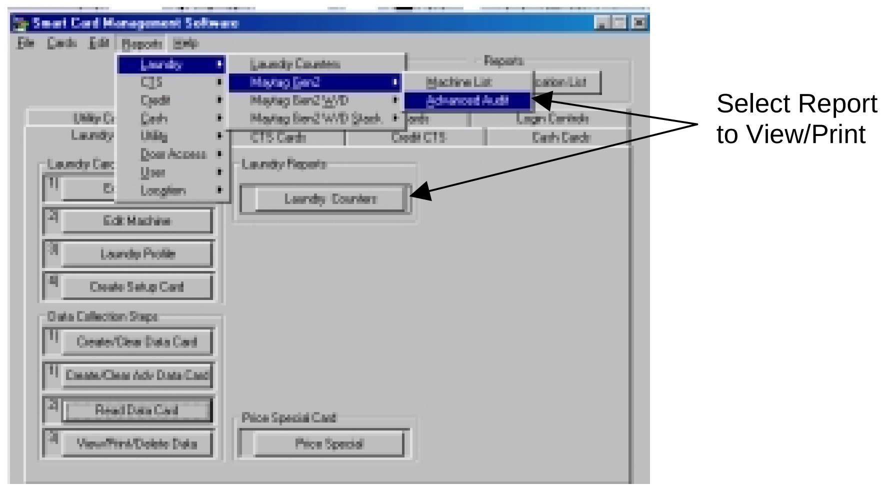

Figure 8.37 Selecting Laundry Machine Report

2. A window specifying a date range will appear (Figure 8.38). Enter the beginning and ending collection dates for the desired report. Select the "No upper Bound" option to view a report containing all transactions since the "Start of range" field value or select the "No lower Bound" option to view a report containing all transactions leading up to the "End of range" value.

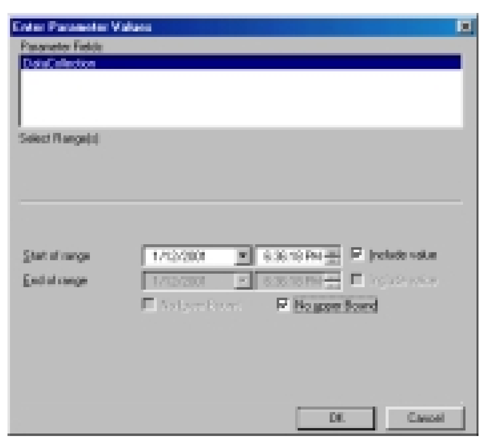

Figure 8.38 Date Range Window

3. The report will be generated and appear on your screen. Either view the report on the screen, or click the printer icon to print the report (Figure 8.39).

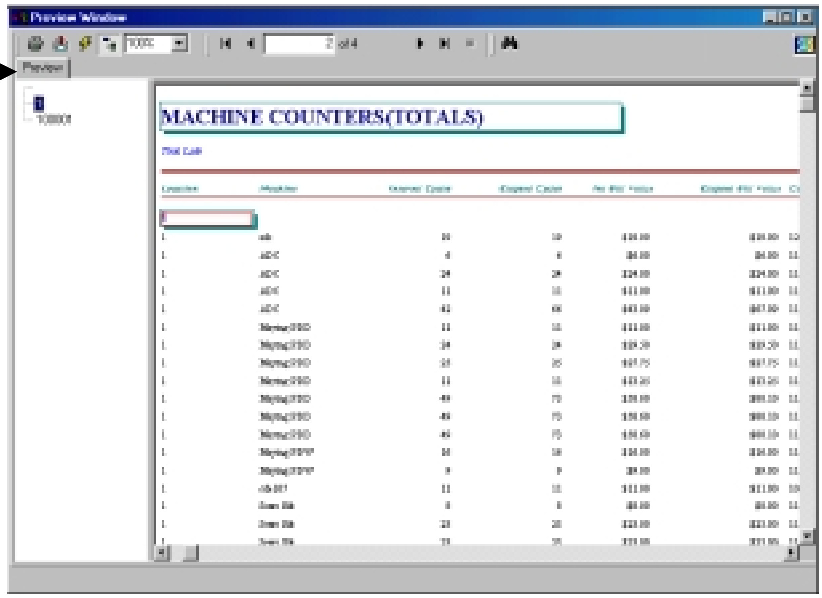

Figure 8.39 Viewing the Machine Counters Report

8.4.5. Understanding Laundry Counters Reports

The report generated reflects all collected data for the date ranges that were specified.

Table 8.9 identifies and explains each field in the Laundry Counters Report.

Table 8.9 Laundry Counter Report

Field Name	Explanation
Location	Location of collection.
Machine	Collected machine ID.
Interval Cycle	Number of cycles since last collection.
Elapsed Cycle	Total number of cycles.
Interval Bill Value	Dollar value charged for vends since last collection.
Elapsed Bill Value	Total dollar value charged for vends.
Collection Date/Time	Date and time of collection.

Note:

For Maytag Gen2 report explanation, refer to section 8.5.2.

8.4.6. Deleting Collection Reports

It is recommended to periodically purge the collection data so that it will not take up unnecessary disk space on your hard drive.

1. Click the View/Print/Delete button (Figure 8.40).

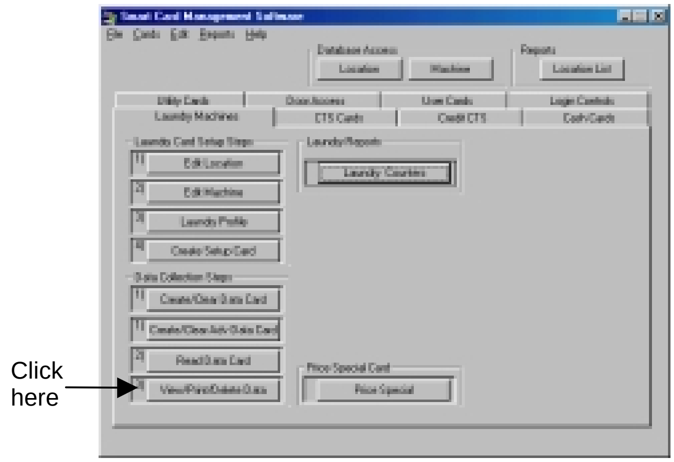

Figure 8.40 Opening the Data Collected Window

2. Select the collection records you wish to delete (Figure 8.41).
3. Select Delete Selected Records from the Edit drop-down menu (Figure 8.41).

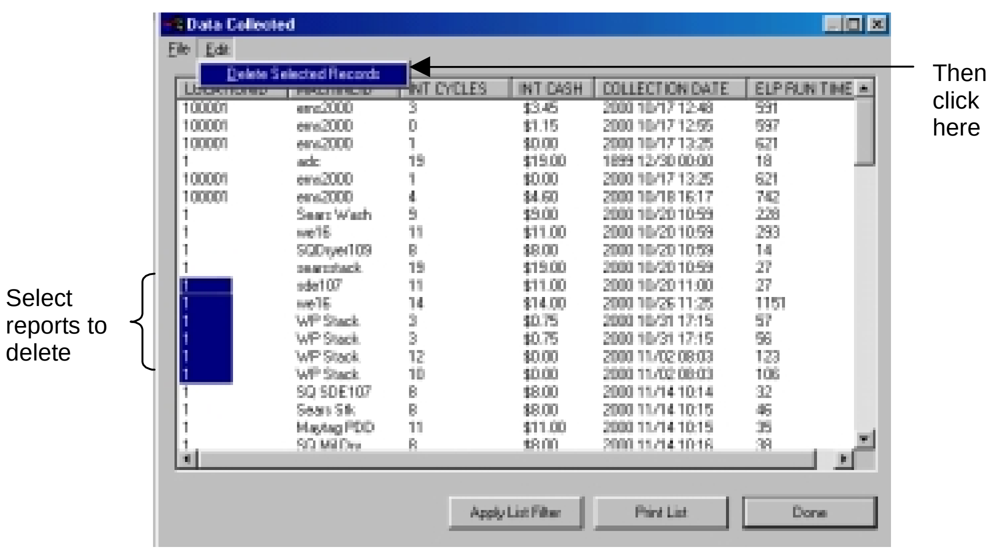

Figure 8.41 Deleting the Collection Records

4. A confirmation window will appear. Click the Yes button to proceed or the No button to cancel.

8.5. Maytag Gen2 Information

8.5.1. Maytag Gen2 Advanced Features

8.5.1.1. Dryer or Dryer Stack

Washer/Dryer Tab	
Position	This value represents the position of the dryer or dryer stack in the room. This is a required field with values predetermined by Maytag. The available values range for dryers is 65-127.
Coin 1 Value	Not used.
Location	Not used.
Topoff Value	Not used.
Machine Serial #	This is the machine serial number assigned to this profile.
Reg Cycle (Min)	Represents the number of minutes for a regular cycle.
Spc Cycle (Min)	Represents the number of minutes for a special cycle.
Features Tab	
Fixed Cycle	A dryer set up for "Fixed Cycle" operation can only accept additional time accumulated by increments equal to the length of a complete dry cycle.
Special Pricing	Enables Special Pricing.
Add Coin Mode	This option causes the machine display to show the number of coins (coin 1) to enter, rather than the dollars-and-cents amount.
Coin Slide Mode	Machine set to operate with Coin-Slide system.
Clear Escrow Disabled	If not disabled, money held in escrow for 30 minutes without further escrow or cycle activity will be cleared.
Disable Price Display	Disables price from being displayed on the machine's display.
Debit Only	Machine set to operate with Smart Card system only.
Coins Only	Machine set to operate with Coin-Drop system only.
Enhanced Debit	**This setting must be selected for the Greenwald Intellicard system.**

Continued on next page

8.5.1.1. Dryer or Dryer Stack continued

Prices Tab	
Penny Offset	This is a preset value by Maytag. If vend value is at $.25 on the Washer/Dryer Tab and $.03 in the penny offset field then the vend price is now calculated at $.28 to start the machine. The penny offset will also change your special pricing and cycle based pricing by the increment chosen.
Special Vend Price	This is the value to set special time of day pricing.
Regular Vend Price	This is the value to set for cycle based pricing.
Time	Time period when special pricing is in effect.
Days	Days of the week when special pricing is in effect.
Super Cycle/Action Codes Tab	
Set Serial	Enables the serial number entered in the Washer/Dryer tab to be transferred into the machine’s microprocessor.
Set Location/Position	Enables the Location/Position set on the Washer/Dryer Tab to be set in the Maytag Microprocessor.
Set Price/Coin Value	Enables the Price/Coin Values set on the Washer/Dryer tab to be set in the Maytag Microprocessor.
Set Cycle Length/# Rinses	Enables the Cycle lengths/and number of rinses set on the Washer/Dryer tab to be set in the Maytag Microprocessor.
Clear Interval Counts	Enables the interval counters to be cleared after data collection.
Clear Interval Counts-CCC	For use with Maytag Accutrac System
Record Used Already	For use with Maytag Accutrac System

8.5.1.2. Washer Dryer Stack

Washer/Dryer Tab	
Position	This value represents the position of the washer/ dryer stack in the room. This is a required field with values predetermined by Maytag. The available values range for washer/ dryer stack are 1-127.
Spin Speed*	Maximum spin speed. *Horizontal models only.
Extra Rinse/Cycle	Rinses/Cycle (Horizontal and Vertical), Extra Rinses/Cycle (Stack)
Coin 1 Value	Not used.
Location	Not used.
Prewash Time (Min)	Length of time for a pre-wash in minutes, range is 0-10.
Rinse Agitate (Min)	Not used.
Coin 2/Topoff	This represents the value of the Topoff value in number of nickels. 05=$0.25
Machine Serial #	This is the machine serial number assigned to this profile.
Wash Agitate (Min)	Length of main wash cycle. Range is 8-20 minutes; default is 10.
Reg Cycle (Min)	Represents the number of minutes for a regular cycle.
Spc Cycle (Min)	Represents the number of minutes for a special cycle.
Final Spin (Min)	Length of the final spin in minutes. Range is 3-10 minutes; default is 4.
Features Tab	
Fixed Cycle	A dryer set up for "Fixed Cycle" operation can only accept additional time accumulated by increments equal to the length of a complete dry cycle.
Special Pricing	Enables Special Pricing.
Add Coin Mode	This option causes the machine display to show the number of coins (coin 1) to enter, rather than the dollars-and-cents amount.
Coin Slide Mode	Machine set to operate with Coin-Slide system.
Clear Escrow Disabled	If not disabled, money held in escrow for 30 minutes without further escrow or cycle activity will be cleared.
Super Cycle Mode	Allows for optional cycle enhancements to be purchased
Disable Price Display	Disables price from being displayed in the machine.
Suds Detect Mode	Allows machine to respond with special function when suds are sensed – Horizontal units only. Minimum wash cycle of 10 minutes required.
Debit Only	Machine set to operate with Smart Card system only.

Continued on next page

8.5.1.2. Washer Dryer Stack continued

Coins Only	Machine set to operate with Coin-Drop system only. Not applicable for Smart Card systems.
Enhanced Debit	**This setting must be selected for the Greenwald Intellicard system.**
Max Extract Disabled	Avoids wrinkles if activated, max water extraction if not.
Cycle Based Pricing	Allows cycles to be priced differently for different water temperatures.
Prices Tab	
Washer	
Penny Offset	This is a preset value by Maytag. If you set your vend value at $.25 on the Washer/Dryer Tab and you select $.03 in the penny offset field then the vend price is now calculated at $.28 to start the machine. The penny offset will also change your special pricing and cycle based pricing by the increment chosen.
Regular Vend Price	Price of a regular cycle.
Regular Cold Price	Price of a regular cold water cycle.
Regular Warm Price	Price of a regular warm water cycle.
Regular Hot Price	Price of a regular hot water cycle.
Special Vend Price	This is the value set for special time of day pricing
Special Cold Price	Price of a special cold water cycle.
Special Warm Price	Price of a special warm water cycle.
Special Hot Price	Price of a special hot water cycle.
Dryer	
Penny Offset	This is a preset value by Maytag. If you set your vend value at $.25 on the Washer/Dryer Tab and you select $.03 in the penny offset field then the vend price is now calculated at $.28 to start the machine. The penny offset will also change your special pricing and cycle based pricing by the increment chosen.
Special Vend Price	Price of a normal cycle during a special time period.
Time	Time period when special pricing is in effect.
Days	Days of the week when special pricing is in effect.

Continued on next page

8.5.1.2. Dryer Washer Stack continued

Super Cycle/Action Codes Tab	
Upgrade Price	Cost to upgrade to a Super Cycle (must be enabled in features)
Type	Sets super cycle type. 1 for agitation enhanced, 2 for water enhanced, 3 for both.
Set Serial	Enables the serial number entered in the Washer/Dryer tab to be transferred into the machine's microprocessor.
Set Location/Position	Enables the Location/Position set on the Washer/Dryer Tab to be set in the Maytag Microprocessor.
Set Price/Coin Value	Enables the Price/Coin Values set on the Washer/Dryer tab to be set in the Maytag Microprocessor.
Set Cycle Length/# Rinses	Enables the Cycle lengths/and number of rinses set on the Washer/Dryer tab to be set in the Maytag Microprocessor.
Clear Interval Counts	Enables the interval counters to be cleared after data collection.
Clear Interval Counts-CCC	For use with Maytag Accutrac System
Record Used Already	For use with Maytag Accutrac System

8.5.1.3. Horizontal Washer

Washer/Dryer Tab	
Position	This value represents the position of the horizontal washer in the room. This is a required field with values predetermined by Maytag. The available values range for washers are 1-63.
Spin Speed	Maximum spin speed. *Horizontal models only.
Extra Rinse/Cycle	Rinses/Cycle (Horizontal and Vertical), Extra Rinses/Cycle (Stack)
Coin 1 Value	Not used.
Location	Not used.
Prewash Time (Min)	Length of time for a pre-wash in minutes, range is 0-10.
Coin 2/Topoff	Not used.
Machine Serial #	This is the machine serial number assigned to this profile.
Wash Agitate (Min)	Length of main wash cycle. Range is 8-20 minutes; default is 10.
Final Spin (Min)	Length of the final spin in minutes. Range is 3-10 minutes; default is 4.
Features Tab	
Special Pricing	Enables Special Pricing.
Add Coin Mode	This option causes the customer display to show the number of coins (coin 1) to enter, rather than the dollars-and-cents amount.
Coin Slide Mode	Machine set to operate with Coin-Slide system.
Clear Escrow Disabled	If not disabled, money held in escrow for 30 minutes without further escrow or cycle activity will be cleared.
Super Cycle Mode	Allows for optional cycle enhancements to be purchased
Disable Price Display	Disables price from being displayed in the machine.
Suds Detect Mode	Allows machine to respond with special function when suds are sensed – Horizontal units only.
Debit Only	Machine set to operate with Smart Card system only.
Coins Only	Machine set to operate with Coin-Drop system only. Not applicable in Smart Card systems.
Enhanced Debit	**This setting must be selected for the Greenwald Intellicard system.**
Max Extract Disabled	Avoids wrinkles if activated, max water extraction if not.
Cycle Based Pricing	Allows cycles to be priced differently for different temperatures.

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8.5.1.3. Horizontal Washer continued

Prices Tab	
Penny Offset	This is a preset value by Maytag. If you set your vend value at $.25 on the Washer/Dryer Tab and you select $.03 in the penny offset field then the vend price is now calculated at $.28 to start the machine. The penny offset will also change your special pricing and cycle based pricing by the increment chosen.
Regular Vend Price	Price of a regular cycle.
Regular Cold Price	Price of a regular cold water cycle.
Regular Warm Price	Price of a regular warm water cycle.
Regular Hot Price	Price of a regular hot water cycle.
Special Vend Price	Represent the number of quarter (coin 2); may adjust from 0-39.
Special Cold Price	Price of a special cold water cycle.
Special Warm Price	Price of a special warm water cycle.
Special Hot Price	Price of a special hot water cycle.
Penny Offset	This is a preset value by Maytag. If you set your vend value at $.25 on the Washer/Dryer Tab and you select $.03 in the penny offset field then the vend price is now calculated at $.28 to start the machine. The penny offset will also change your special pricing and cycle based pricing by the increment chosen.
Special Vend Price	This is the value you set for special time of day pricing.
Regular Vend Price	Price of a regular cycle.
Time	Time duration when special pricing is in effect.
Days	Days of the week when special pricing is in effect.
Super Cycle/Action Codes Tab	
Upgrade Price	Cost to upgrade to a Super Cycle (must be enabled in features)
Type	Sets super cycle type. 1 for agitation enhanced, 2 for water enhanced, 3 for both.
Set Serial	Enables the serial number entered in the Washer/Dryer tab to be transferred into the machine’s microprocessor.
Set Location/Position	Enables the Location/Position set on the Washer/Dryer Tab to be set in the Maytag Microprocessor.
Set Price/Coin Value	Enables the Price/Coin Values set on the Washer/Dryer tab to be set in the Maytag Microprocessor.

Continued on next page

8.5.1.3. Horizontal Washer continued

Set Cycle Length/# Rinses	Enables the Cycle lengths/and number of rinses set on the Washer/Dryer tab to be set in the Maytag Microprocessor.
Clear Interval Counts	Enables the interval counters to be cleared after data collection.
Clear Interval Counts-CCC	For use with Maytag Accutrac System
Record Used Already	For use with Maytag Accutrac System

8.5.1.4. Vertical Washer

Washer/Dryer Tab	
Position	This value represents the position of the vertical washer in the room. This is a required field with values predetermined by Maytag. The available values range for washers are 1-63.
Spin Speed	Maximum spin speed. *Horizontal models only.
Extra Rinse/Cycle	Rinses/Cycle (Horizontal and Vertical), Extra Rinses/Cycle (Stack)
Coin 1 Value	Not used.
Location	Not used.
Prewash Time (Min)	Length of time for a pre-wash in minutes, range is 0-10..
Rinse Agitate (Min)	Not used.
Coin 2/Topoff	Not used.
Machine Serial #	This is the machine serial number assigned to this profile.
Wash Agitate (Min)	Length of main wash cycle. Range is 8-20 minutes; default is 10.
Final Spin (Min)	Length of the final spin in minutes. Range is 3-10 minutes; default is 4.
Features Tab	
Special Pricing	Enables Special Pricing.
Add Coin Mode	This option causes the customer display to show the number of coins (coin 1) to enter, rather than the dollars-and-cents amount.
Coin Slide Mode	Machine set to operate with Coin-Slide system.
Clear Escrow Disabled	If not disabled, money held in escrow for 30 minutes without further escrow or cycle activity will be cleared.
Super Cycle Mode	Allows for optional cycle enhancements to be purchased
Disable Price Display	Disables price from being displayed in the machine.
Suds Detect Mode	Allows machine to respond with special function when suds are sensed – Horizontal units only.
Debit Only	Machine set to operate with Smart Card system only.
Coins Only	Machine set to operate with Coin-Drop system only. Not applicable in Smart Card systems.
Enhanced Debit	**This setting must be selected for the Greenwald Intellicard system.**
Max Extract Disabled	Avoids wrinkles if activated, max water extraction if not.
Cycle Based Pricing	Allows cycles to be priced differently for different temperatures.

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8.5.1.4. Vertical Washer continued

Prices Tab	
Penny Offset	This is a preset value by Maytag. If you set your vend value at $.25 on the Washer/Dryer Tab and you select $.03 in the penny offset field then the vend price is now calculated at $.28 to start the machine. The penny offset will also change your special pricing and cycle based pricing by the increment chosen.
Regular Vend Price	Price of a regular cycle.
Regular Cold Price	Price of a regular cold water cycle.
Regular Warm Price	Price of a regular warm water cycle.
Regular Hot Price	Price of a regular hot water cycle.
Special Vend Price	Represent the number of quarter (coin 2); may adjust from 0-39.
Special Cold Price	Price of a special cold water cycle.
Special Warm Price	Price of a special warm water cycle.
Special Hot Price	Price of a special hot water cycle.
Penny Offset	This is a preset value by Maytag. If you set your vend value at $.25 on the Washer/Dryer Tab and you select $.03 in the penny offset field then the vend price is now calculated at $.28 to start the machine. The penny offset will also change your special pricing and cycle based pricing by the increment chosen.
Special Vend Price	Price of a normal cycle during a special time period.
Regular Vend Price	Price of a regular cycle.
Time	Time duration when special pricing is in effect.
Days	Days of the week when special pricing is in effect.
Super Cycle/Action Codes Tab	
Upgrade Price	Cost to upgrade to a Super Cycle (must be enabled in features)
Type	Sets super cycle type. 1 for agitation enhanced, 2 for water enhanced, 3 for both.
Set Serial	Enables the serial number entered in the Washer/Dryer tab to be transferred into the machine's microprocessor.
Set Location/Position	Enables the Location/Position set on the Washer/Dryer Tab to be set in the Maytag Microprocessor.
Set Price/Coin Value	Enables the Price/Coin Values set on the Washer/Dryer tab to be set in the Maytag Microprocessor.
Set Cycle Length/# Rinses	Enables the Cycle lengths/and number of rinses set on the Washer/Dryer tab to be set in the Maytag Microprocessor.
Clear Interval Counts	Enables the interval counters to be cleared after data collection.
Clear Interval Counts-CCC	For use with Maytag Accutrac System
Record Used Already	For use with Maytag Accutrac System

8.5.2. Maytag Gen2 Reports

8.5.2.1. Machine List	
Location	Location ID of Machine (SMS2 Location ID).
Name	Name of machine's location.
Machine	Machine ID of Machine.
Model	Model Number (if entered).
Position	Position in Room (if entered).
Machine Serial	Machine's serial Number (if entered).

8.5.2.2. Machine Elapsed Monies	
Location	Location ID of Machine.
Machine	Name of machine's location.
Model Code	Model Code (sent from Machine).
Int Cash	Cash collected for this interval.
Elp Money	Total cash collected since installation.
Collection Date/Time	Date and time of collection.

8.5.2.3. Machine Interval Counters	
Location	Location ID of Machine.
Machine	Name of machine's location.
Model	Model Code (sent from Machine).
Reg Prc Cycle	Number of regular priced cycles.
Spc Prc Cycle	Number of special cycles
No Runs	Number of cycles where money was taken, but machine did not run.
Srv Cycles	Number of service cycles.
Trouble Cycles	Number of trouble cycles.
Power Downs	Number of times machine was powered down.
UnAuth Srv	Number of unauthorized service door openings.
Auth Srv	Number of authorized service door openings.
UnAuth Coin Va	Number of unauthorized coin vault openings
Auth Coin Value	Number of authorized coin vault openings
Collection Date/Time	Date and time of collection

8.5.2.4. Machine Elapsed Counters	
Location	Location ID of Machine.
Machine	Name of machine's location.
Model	Model Code (sent from Machine).
Reg Prc Cycle	Number of regular priced cycles.
Spc Prc Cycle	Number of special cycles
No Runs	Number of cycles where money was taken, but machine did not run.
Srv Cycles	Number of service cycles.
Trouble Cycles	Number of trouble cycles.
Power Downs	Number of times machine was powered down.
UnAuth Srv	Number of unauthorized service door openings.
Auth Srv	Number of authorized service door openings.
UnAuth Coin Va	Number of unauthorized coin vault openings
Auth Coin Value	Number of authorized coin vault openings
Collection Date/Time	Date and time of collection

8.5.2.5. Machine Service	
Location	Location ID of Machine.
Machine	Name of machine's location.
Time Last CV	Time of last coin vault opening.
Time Last Trouble	Time of last trouble cycle.
Time Last Power Down	Time of last power failure/shutoff to machine.
Time Last Srv Opns	Time of Last service door opening.
Time Prev Srv Opns	Time of previous service door opening.
Time Prev CV	Time of previous coin vault opening.
Time Prev Trouble	Time of previous trouble cycle.
Time Prev Power Down	Time of previous power down.
Time Last Setup	Time of last machine setup, price change, etc.
Collection Date/Time	Date and time of collection.

8.5.2.6. Stack Interval Washer Counters	
Location	Location ID of machine.
Machine	Name of machine's location.
Model	Model Code (sent from Machine).
Sud Cyc	Number of suds cycles performed.
Suds Rec Cyc	Number of suds recovery cycles performed.
Power Off	Number of times machine was powered off.
UA Srv	Number of unauthorized service door openings.
A Srv	Number of authorized service door openings.
UA Coin V	Number of unauthorized coin vault openings.
A Coin V	Number of authorized coin vault openings.
Reg Prc Cyc	Number of regular priced cycles performed.
Spc Prc Cyc	Number of special priced cycles performed.
No Runs	Number of times where money was taken, but machine did not run.
Serv Cyc	Number of service cycles.
Trouble	Number of trouble cycles.
Collection Date/Time	Date and time of collection

8.5.2.7. Stack Elapsed Washer Counters	
Location	Location ID of Machine.
Machine	Name of machine's location.
Model	Model Code (sent from Machine).
Sud Cyc	Number of suds cycles performed.
Suds Reg Cyc	Number of suds recovery cycles performed.
Power Off	Number of times machine was powered off.
UA Srv	Number of unauthorized service door openings.
A Srv	Number of authorized service door openings.
UA Coin V	Number of unauthorized coin vault openings.
A Coin V	Number of authorized coin vault openings.
Reg Prc Cyc	Number of regular priced cycles performed.
Spc Prc Cyc	Number of special priced cycles performed.
No Runs	Number of times where money was taken, but machine did not run.
Serv Cyc	Number of service cycles.
Trouble	Number of trouble cycles.
Collection Date/Time	Date and time of collection

8.5.2.8. Stack Interval Dryer Counters	
Location	Location ID of Machine.
Machine	Name of machine's location.
Model	Model Code (sent from Machine).
Power Off	Number of times machine was powered off.
UA Serv	Number of unauthorized service door openings.
A Serv	Number of authorized service door openings.
UA Coin V	Number of unauthorized coin vault openings.
A Coin V	Number of authorized coin vault openings.
Reg Topoff Cyc	Number of regular top-off cycles performed.
Spc Topoff Cyc	Number of special top-off cycles performed.
Reg Cyc	Number of regular priced cycles performed.
Spc Cyc	Number of special priced cycles performed.
No Runs	Number of times where money was taken, but machine did not run.
Service	Number of service cycles.
Trouble	Number of trouble cycles.
Collection Date/Time	Date and time of collection

8.5.2.9. Stack Elapsed Dryer Counters	
Location	Location ID of Machine.
Machine	Name of machine's location.
Model	Model Code (sent from Machine).
Power Off	Number of times machine was powered off.
UA Serv	Number of unauthorized service door openings.
A Serv	Number of authorized service door openings.
UA Coin V	Number of unauthorized coin vault openings.
A Coin V	Number of authorized coin vault openings.
Reg Topoff Cyc	Number of regular top-off cycles performed.
Spc Topoff Cyc	Number of special top-off cycles performed.
Reg Cyc	Number of regular priced cycles performed.
Spc Cyc	Number of special priced cycles performed.
No Runs	Number of times where money was taken, but machine did not run.
Service	Number of service cycles.
Trouble	Number of trouble cycles.
Collection Date/Time	Date and time of collection

8.5.2.10. Stack Washer Dryer Service	
Location	Location ID of machine.
Machine	Name of machine's location.
Model	Model code (sent by machine).
Last Coin V	Time of last coin vault opening.
Last Serv	Time of last service door opening.
Last Power Off	Time of last machine power off.
Last Setup	Time of last machine setup, price change, etc.
Last D Trouble	Time of last dryer trouble cycle.
Last W Trouble	Time of last washer trouble cycle.
Prev Serv	Time of previous service door opening.
Prev Coin V	Time of previous coin vault opening,
Prv Power Off	Time of previous machine power off.
Prev D Trouble	Time of previous dryer trouble cycle.
Prev W Trouble	Time of previous washer trouble cycle.
Collection Date/Time	Date and time of collection

CTS Card Manager

9

9.1.1. Overview

A Cash Card Transaction Station (Cash CTS), allows for unattended smart card purchases or recharge (adding value to an existing card). Three basic types of Cash CTS's are currently supported by the SMS2 software:

- Cash CTS with Dispenser
- Add-Value only Cash CTS (without dispenser)
- MiniMate – Low Cost Add-Value Station

While the three Cash CTS types are somewhat different, their basic operation are similar.

9.1.1.1. Cash CTS Operation

The Cash CTS is typically located in the vicinity of the laundry machines. The Cash CTS is ruggedly constructed of heavy-duty stainless steel for optimal security of the stored cash within.

When a customer needs to purchase a new smart card, or add value to an existing card, cash is inserted into the bill acceptor. When the cash is accepted, the Cash CTS will ask if the customer wants to add value to an existing card or purchase a new one (provided that the machine has a dispenser). If the customer decides to purchase a new card, a message can appear stating the cost for a new card and the required action for the customer to proceed. If only adding value, the Cash CTS will prompt the customer to insert their existing card. At this point, the Cash CTS will either dispense the new card or add value to the existing card.

During these two different transactions, a record is kept. When cash is collected, a Data Collection Card is inserted into the Cash CTS. All information pertaining to the cash collected by the machine and cards dispensed is transferred to the Data Collection Card. The data can then be transferred to a PC and viewed by an administrator at a later time.

9.1.1.2. The Setup Process

There are four steps necessary to setup the Cash CTS:

1. Create a Location (see chapter 5).
2. Enter Cash CTS information into the Machine Manager (see chapter 7).
3. Create a Cash CTS profile (Section 9.2).

4. Create a Cash CTS setup card (Section 9.3).

9.2 Cash CTS Profiles

The Cash CTS Profile Manager record is made up of three basic components (Figure 9.1):

- The **CTS Profile List Window** displays all the Cash CTS profiles in the software. The records are sorted by the Profile Name, Idle Message, and Problem Message.
- The **Main Body** of the record contains the profile information specified by the system user.
- **Command buttons** for the most commonly used features have been included for ease of use.

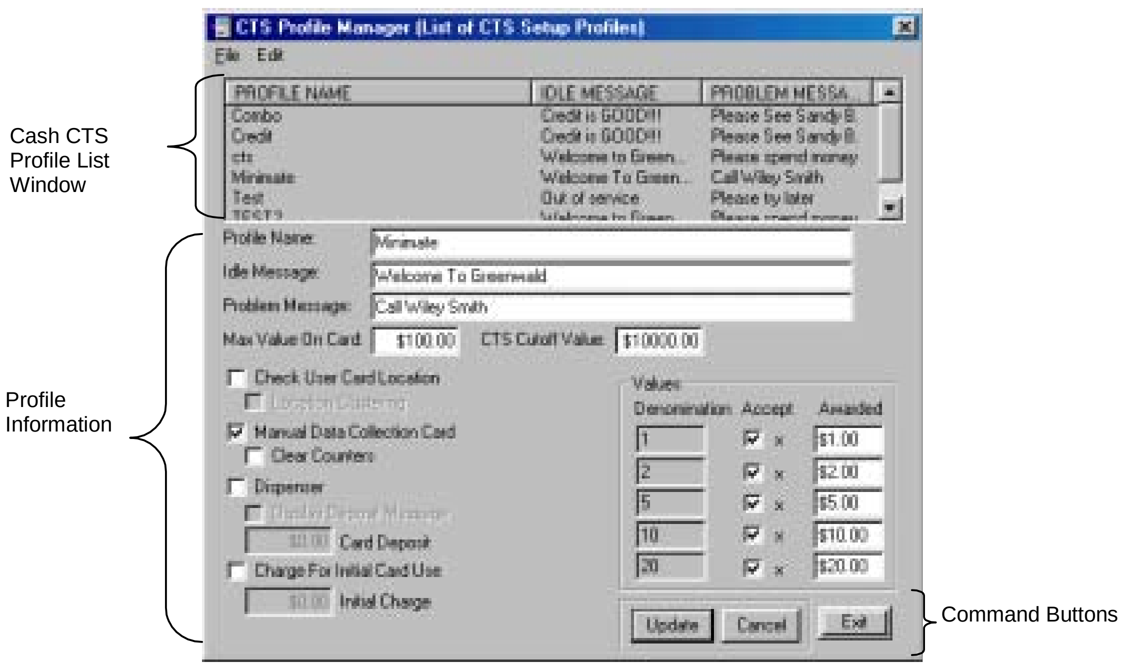

Figure 9.1 Cash CTS Profile Record Interface

Table 9.1 describes each field in the Cash CTS Profile Manager and identifies the field restrictions.

Table 9.1 Cash CTS Profile Manager Fields

Field Name	Description	Restrictions
Profile Name	Required unique field creating an identity for the profile.	Any alphanumeric combination up to 30 characters in length
Idle Message	Message displayed on Cash CTS while not in use.	Up to 20 characters
Problem Message	Message displayed on Cash CTS when an error has occurred.	Up to 20 characters
Max Value on Card	Sets the maximum amount of value that can be set to the card.	Currency field
Cash CTS Cutoff Value	Sets the Cash CTS to go into an error mode once a certain amount of cash has been collected.	Currency field
Check User Card Location	If this option is selected, only users with correct location ID can add value to their card.	Check Box
Location Clustering	Selecting this feature enables location clustering (See Chapter 5).	Check Box
Manual Data Collection Card	Enabling this feature allows for the use of a manual collection card. A manual collection card displays collection information on the Cash CTS display, but does not transfer that information to the card.	Check Box
Clear Counters	Clear counters, when enabled, clears all collection information after the use of Manual Collection Card. Use caution with this feature as all information is lost once data is displayed on the Cash CTS screen.	Check Box
Dispenser	This will enable or disable the dispenser in the Cash CTS	Check Box
Display Deposit Message	Enabling this feature prompts the Cash CTS to display cost of card for new card purchases, and for customer to accept before proceeding.	Check Box

continued on next page

Table 9.1 continued

Card Deposit	Sets the cost for dispensed cards.	Currency field
Charge for Initial Card Use	When this option is selected the first time a User Card with this option enabled the user will be charged a fee to offset the cost of the card.	Check Box
Initial Charge	Sets the Initial Charge cost for using a User Card for the first time.	Currency field
Denomination	Lists all bill denominations accepted by bill acceptor.	Software Specified
Accept	Allows specifying which bills to accept.	Check Box
Awarded	Specifies amount of value awarded for each bill. For example, you can award a $22 value for a $20 bill to encourage the use of larger bills.	Currency field

9.2.1. Working with the Cash CTS Profile Manager

9.2.1.1. Adding a Profile

1. In the Cash CTS Cards tab, click the Cash CTS Profile button (Figure 9.2).

Click here to open Cash CTS Profile Manager

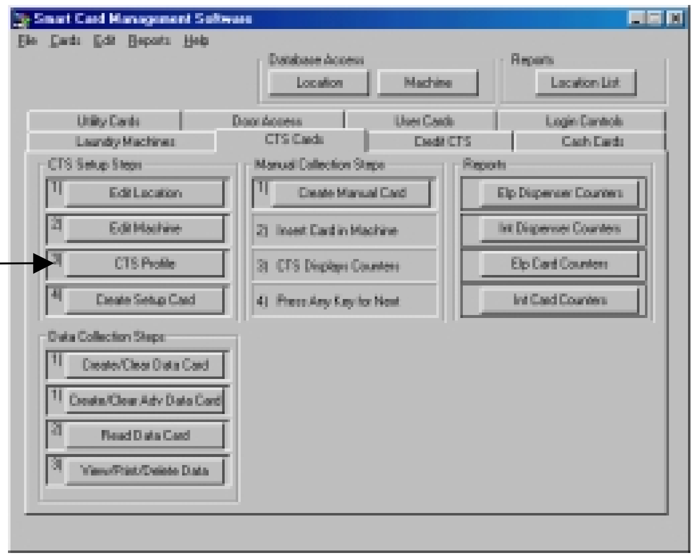

Figure 9.2 Opening the Cash CTS Profile Manager

2. Select Add New Profile from the edit drop-down menu (Figure 9.3).

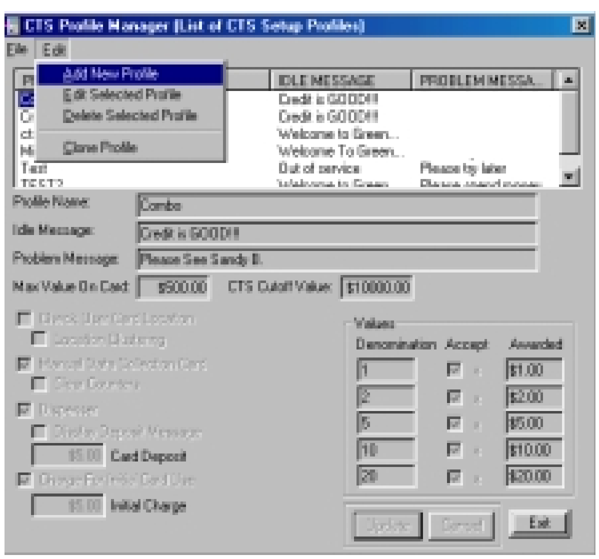

Figure 9.3 Adding a Cash CTS Profile

3. Enter data into fields (see table 9.1)
4. Verify that all data has been entered correctly; click the Update button to save the new profile (Figure 9.4).

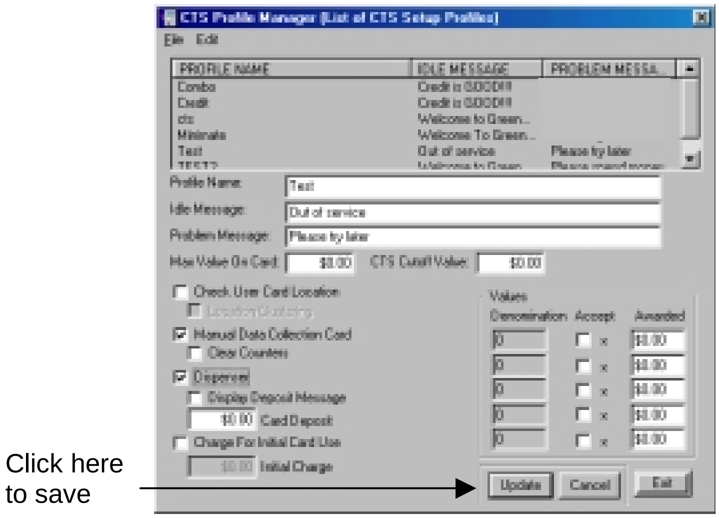

Figure 9.4 Saving Additions/Changes to Cash CTS Profile Manager

9.2.1.2. Editing a Profile

1. In the Cash CTS Cards tab, click the Cash CTS Profile button (see Figure 9.2).
2. Click the profile to edit from the Cash CTS Profile List Window (Figure 9.5).
3. Select Edit Selected Profile from the Edit drop-down menu (Figure 9.5).

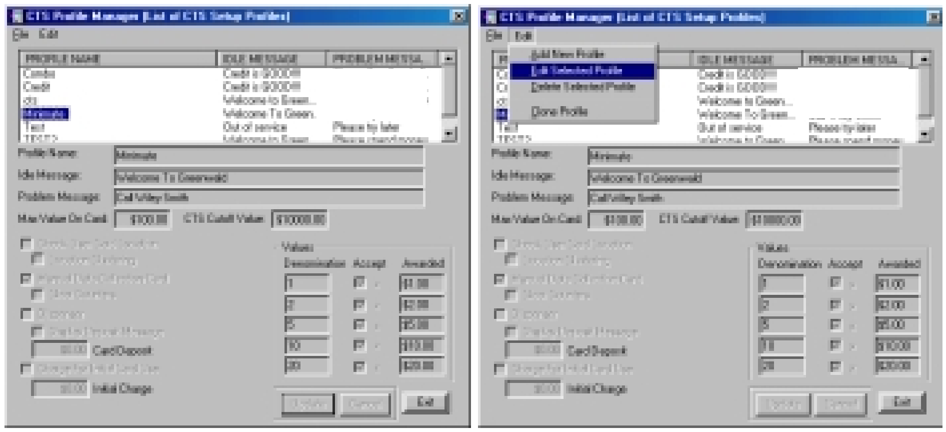

Figure 9.5 Editing a Cash CTS Profile

Tech Tip

Steps 2 and 3 can be avoided by simply double clicking on the profile to be edited from the Profile List Window.

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4. Make necessary changes.
5. Verify that the new information is correct, and click the Update button to save changes (see Figure 9.4).

9.2.1.3. Deleting a Profile

Warning!

A deleted profile cannot be recovered

1. In the Cash CTS Cards tab, click the Cash CTS Profile button (see Figure 9.2).
2. Click the profile to delete from the Profile List Window (Figure 9.6).
3. Select Delete Selected Profile from the Edit drop-down menu (Figure 9.6).

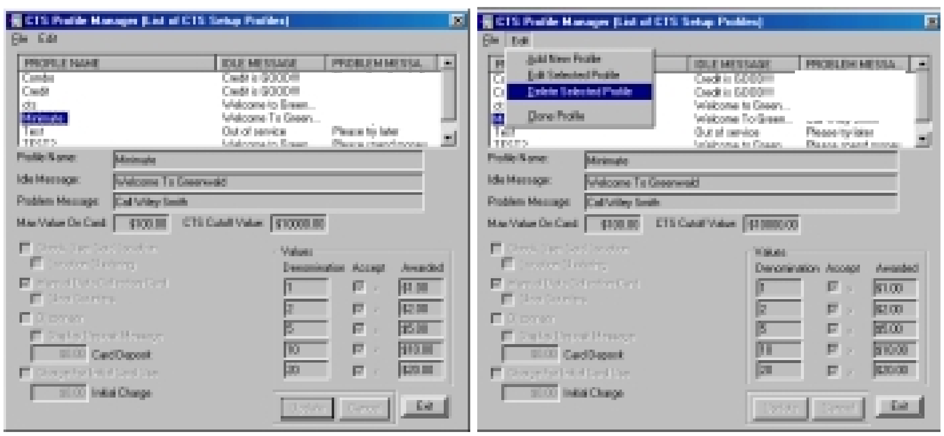

Figure 9.6 To Delete a Cash CTS Profile

4. A message will appear to verify deletion of selected Profile, click the Yes button to proceed with deletion of machine or the No button to cancel (Figure 9.7).

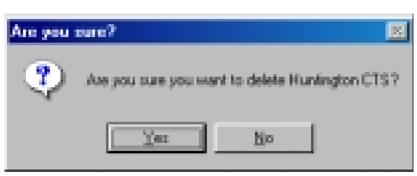

Figure 9.7 Deletion Confirmation

9.2.1.4. Cloning a Profile

The cloning feature has been included with SMS2 as a time saving feature for adding multiple profiles with similar information.

The cloning feature allows the system operator to copy all the information for an existing profile in the database except for the Profile Name field. Once a profile is cloned, the operator enters a new Profile Name, and the new profile information is saved as a new record.

1. In the Cash CTS Cards tab, click the Cash CTS Profile button (see Figure 9.2).
2. Click the profile to clone from the Profile List Window (Figure 9.8).
3. Select Clone Profile from the Edit drop-down menu (Figure 9.8).

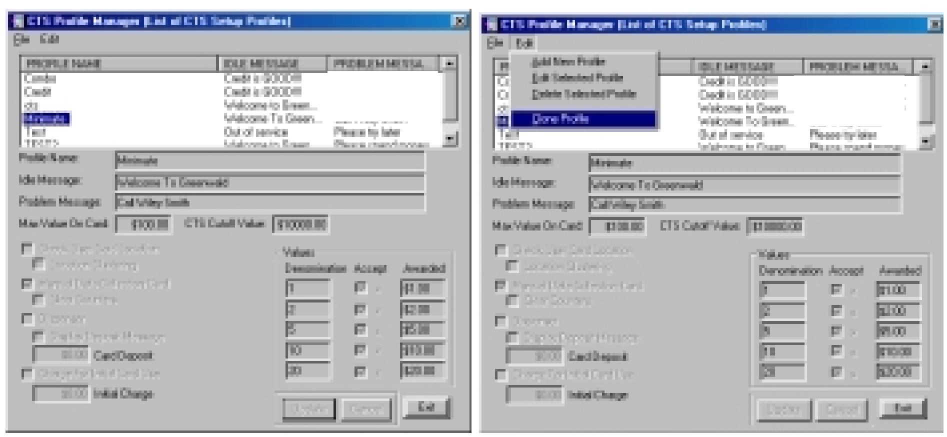

Figure 9.8 Cloning a Cash CTS Profile

4. Enter a new Profile Name (Figure 9.9).
5. Click the Update button to save the new profile record (Figure 9.9).

Enter new Profile Name

Then click here to save new profile

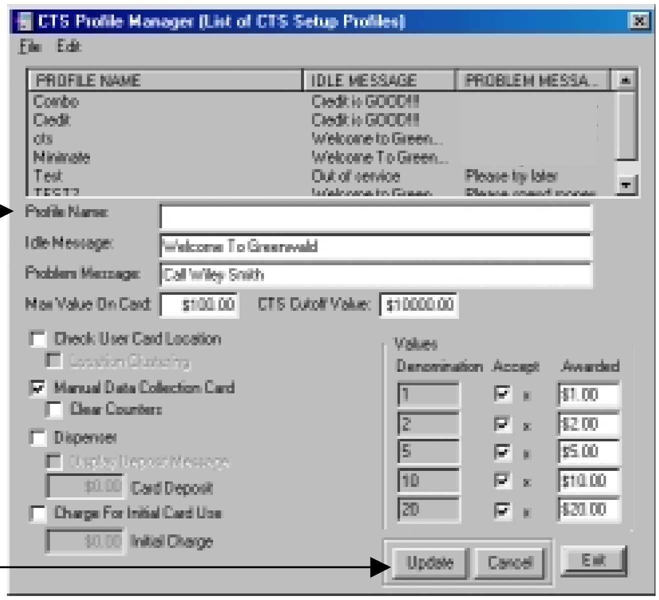

Figure 9.9 Cloning a Cash CTS Profile

9.3. Cash CTS Setup Card

Once the location, machine and profile information have been entered, a setup card can be created.

The card creation is accomplished in the Cash CTS Setup Card window. This window is comprised of three parts (Figure 9.10):

1. In the select machine ID and Location ID section, you can select which Cash CTS type and at what location to program (machine setup is discussed in chapter 7). Additionally, an option to sort by location is available and may be needed for users who have many facilities.
2. In the Select Profile section, a list of previously created profiles appears to choose from.
3. In the last section of the Cash CTS Setup Card Window, the card programming process is executed.

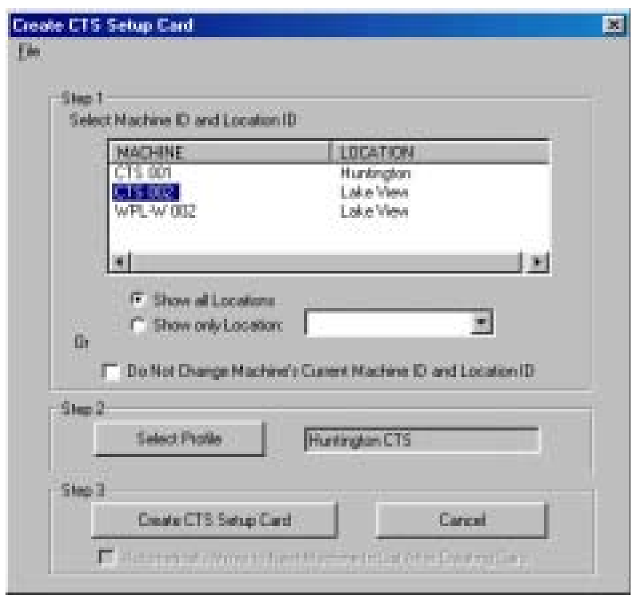

Figure 9.10 Create Cash CTS Setup Card Window

9.3.1. Creating a Cash CTS Setup Card

1. In the Cash CTS Card tab, click the Create Setup Card button (Figure 9.11).

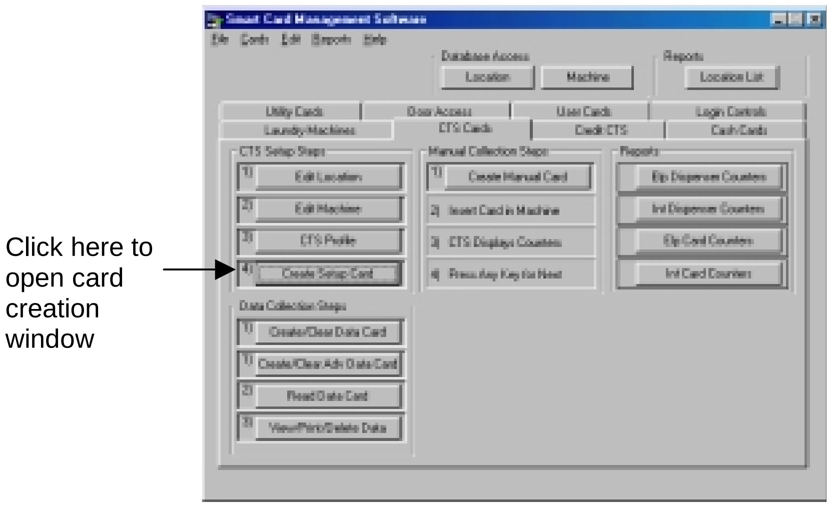

Figure 9.11 Creating Cash CTS Setup Card

2. Select a Machine ID with a corresponding Location ID by clicking on it. There are two ways to view the machines in the database (Figure 9.12):

    a. Click “Show all Locations” and view the entire list of machines.

    b. Click “Show only Location” and use the drop-down menu to view only machines from the selected locations

3. Use the “Do Not Change Machine’s Current Machine ID and Location ID” option to reprogram machine options without changing its ID. This option allows one card to reprogram many machines.

4. Click the Select Profile button (Figure 9.12).

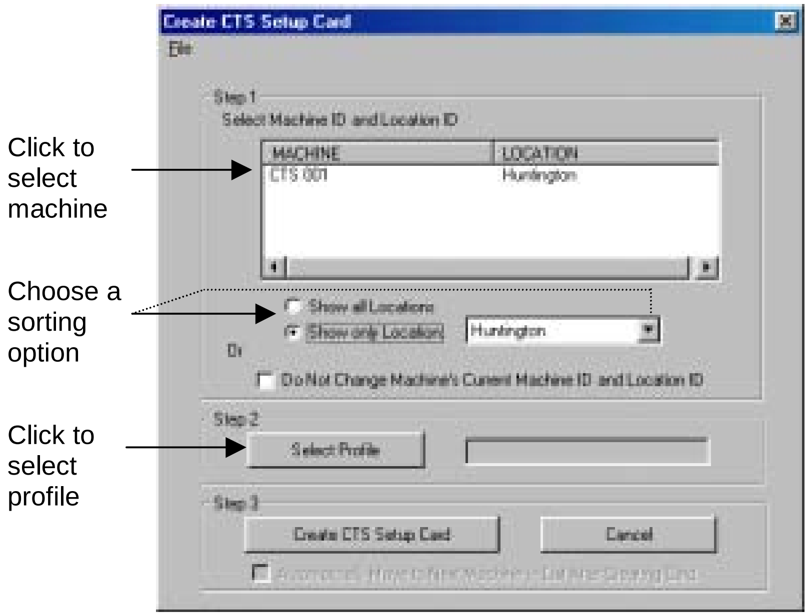

Figure 9.12 Cash CTS Setup Card Creation Steps

5. Select profile from Profile List Window (Figure 9.13).
6. Review to verify that the profile information is correct, and click the Select button (Figure 9.13).

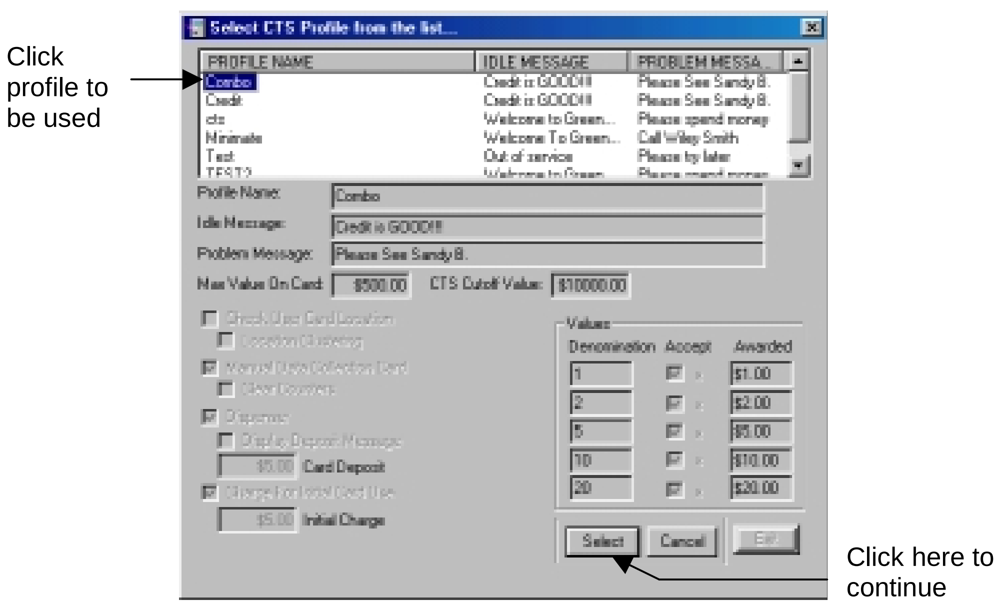

Figure 9.13 Selecting a Cash CTS Profile

7. Insert a management smart card into the PC reader (Section 2.4.2), and click the Create Cash CTS Setup Card button (Figure 9.14).

Click here to complete Cash CTS Setup Card creation

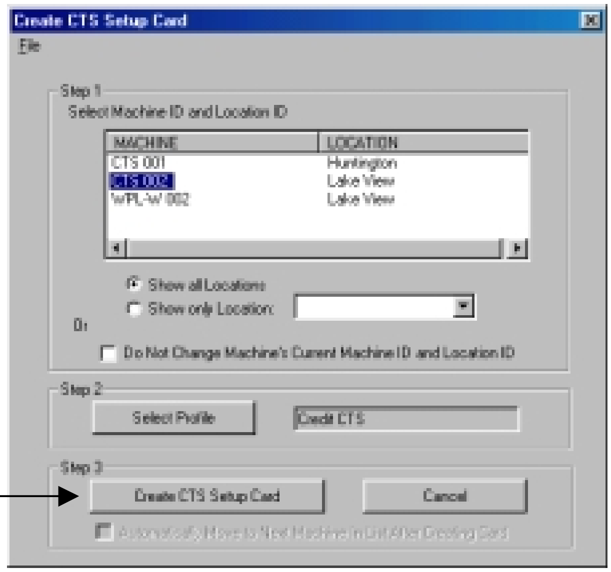

Figure 9.14 Creating the Cash CTS Setup Card

Note:
If multiple machines are to be setup, enable the "Automatically Move to the Next Machine In List After Creating Card" option. This will automatically go to the next machine on the list and save time. Be sure to use a different management card each time.

9.4. Reports and Data Collection

There are four reports available for the Cash CTS, they are:

- Cash CTS Dispensed Elapsed Counters
- Cash CTS Dispensed Interval Counters
- Cash CTS Elapsed Card Counters
- Cash CTS Interval Card Counters

Each one of these reports shows either the elapsed total or the interval amounts of money collected for either dispensed cards or reloaded (revalued) cards. Each report is prepared with the Location ID, Machine ID, total cash collected, and an inventory of each bill denomination.

The process for getting the report is as follows:

1. Create a Data Collection Card
2. Collect data from machine
3. Read Data Card
4. View or print the report

9.4.1. Creating or Clearing a Collection Card

This process is used to create or clear a Data Collection Card. To collect CTS counter information, a standard data collection card is used. To collect the Initial Card Charge information in addition to the CTS counter information, an advanced data collection card is used. .

1. Insert a management card into the PC Reader (Section 2.4.2).
2. In the Cash CTS Card tab, click the Create/Clear Data Card or the Create/Clear Adv Data Card button (Figure 9.15).

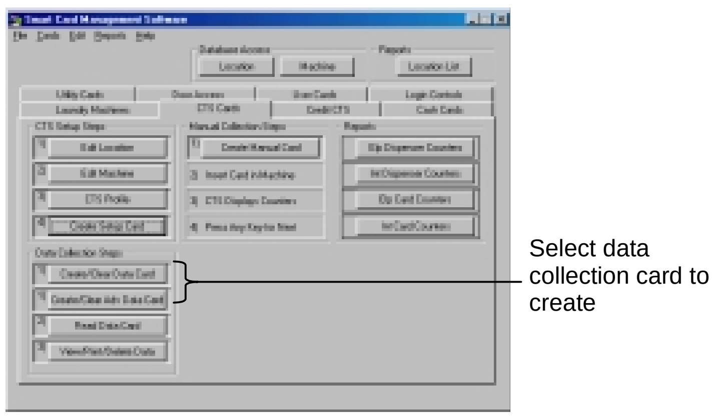

Figure 9.15 Creating a Cash CTS Data Collection Card

9.4.2. Collecting Data from the Cash CTS

To collect data from a Cash CTS, insert a data collection card into the unit’s card reader and remove it when prompted by the Cash CTS.

Note:
If “User Transaction” Data Collection is enabled, a service card must be inserted into the Cash CTS. Once the Service Card has been inserted there is one minute to use the Data Collection Card.

9.4.3. Reading a Data Card

1. Insert data card with the collection information into the PC reader (Section 2.4.2).
2. In the Cash CTS Card tab, click the Read Data Card button (Figure 9.16).

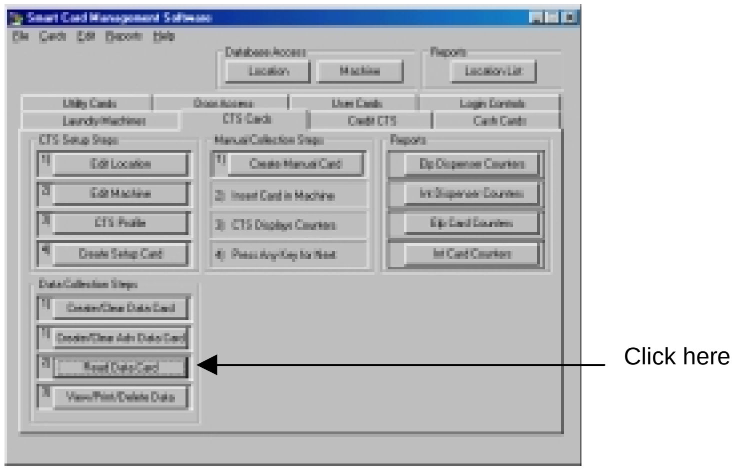

Figure 9.16 Reading a Cash CTS Data Collection Card

3. Select option to show all the Cash CTS data collections on the card or only ones that have not been saved to the database, then click the Read CTS Collection Card button (Figure 9.17).

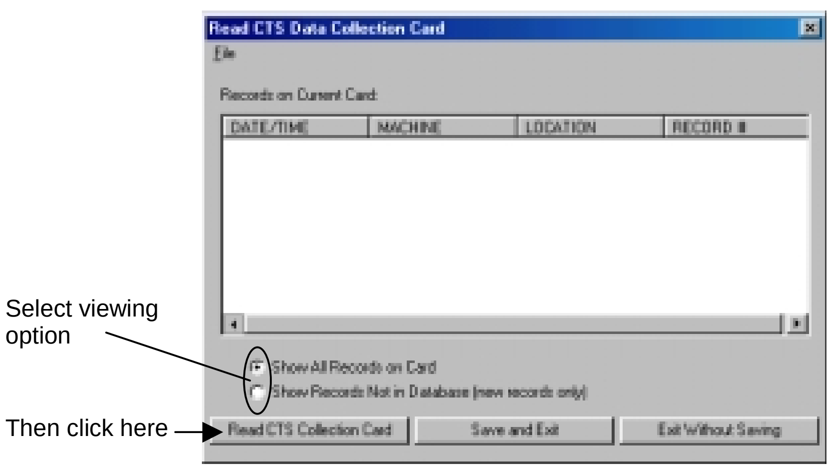

Figure 9.17 Reading the Cash CTS Data Collection Card

4. The Read CTS Data Collection Card window will open and list all the CTS data collections on the card. Select which records to save. Select the Save Selected Records from the File drop-down menu or click the Save and Exit button to save all records (Figure 9.18).

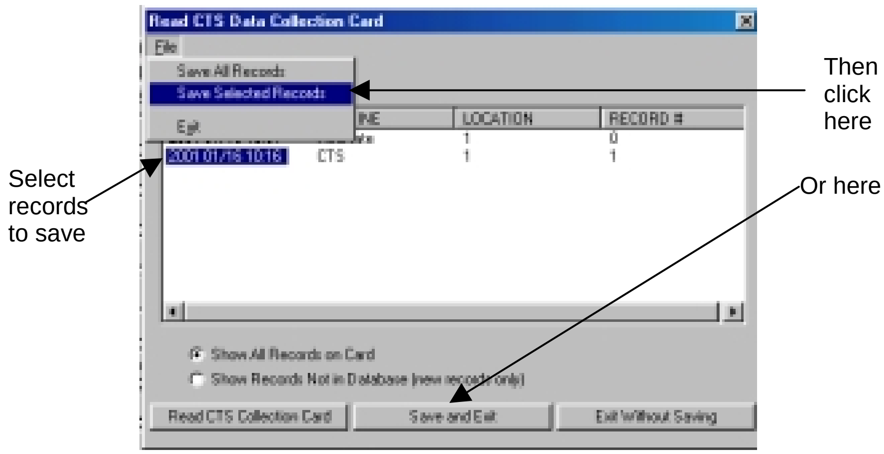

Figure 9.18 Saving the Collection Records

5. Double-clicking on a collection record listed in the Read User Data Collection Card window will open a window containing the Transaction Information, Machine ID, Location and Collection Date/Time of that record.

9.4.4. Viewing and Printing Reports

1. Open a desired report in one of two ways (Figure 9.19):
   - Click on the button for the desired report in the CTS Cards Manager.
   - Select the desired report from the CTS sub menu of the Reports drop-down menu in the main window.

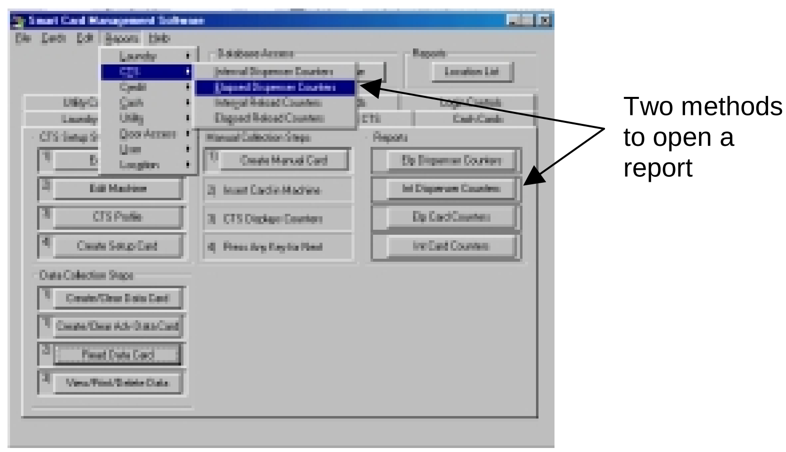

Figure 9.19 Opening a Cash CTS Report

2. A window specifying a date range will appear (Figure 9.20). Enter the beginning and ending collection dates for the desired report. Select the “No upper Bound” option to view a report containing all transactions since the “Start of range” field value or select the “No lower Bound” option to view a report containing all transactions leading up to the “End of range” value.

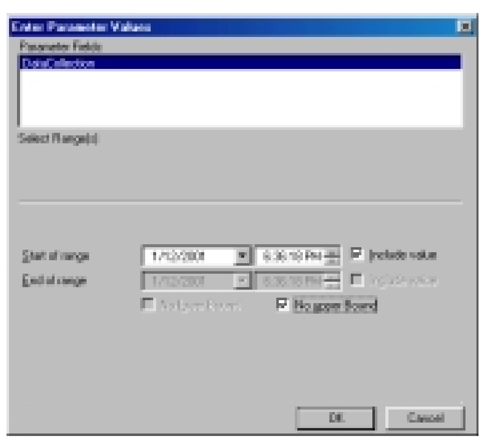

Figure 9.20 Date Range Window

3. The report will be generated and appear on the screen. You can either view it on the screen, or click the printer icon to print the report (Figure 9.21).

Click here to print report

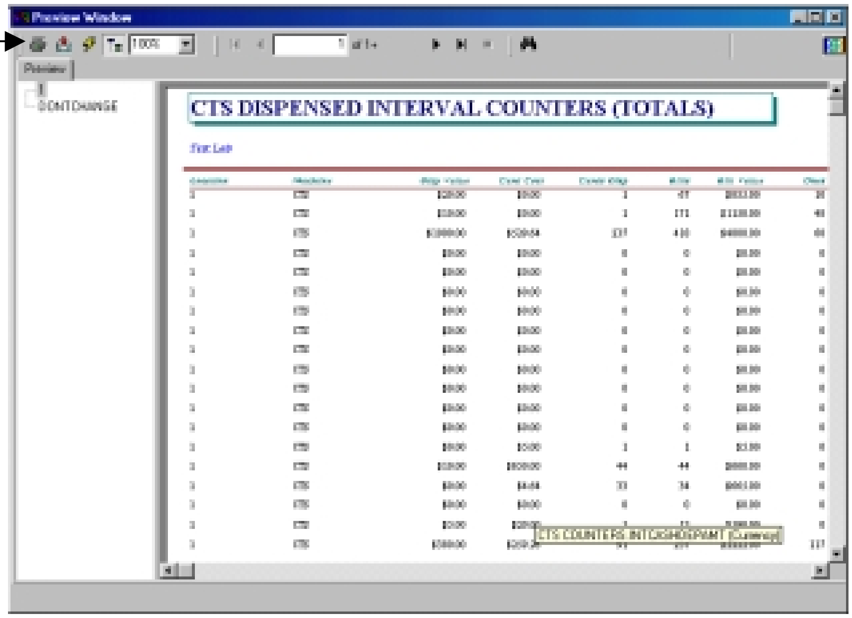

Figure 9.21 Viewing the Cash CTS Report

9.4.5. Understanding the Cash CTS Reports

The report generated reflects all collected transactions for the date ranges that were specified.

Tables 9.2 – 9.5 identify and explain each field in the different Cash CTS Collection Report.

Table 9.2 Cash CTS Dispensed Elapsed Counters Report

Field Name	Explanation
Location	Location of collection
Machine	Collected machine ID
Card Value	Elapsed total for dollars sold on dispensed cards (does not include deposit cost)
Card Cost	Elapsed total for dollars collected for card deposit.
Cards Disp	Elapsed total for number of cards dispensed.
Bills	Elapsed total number of bills collected by machine.
Bill Value	Elapsed total value of currency collected by machine.
Ones	Elapsed total number of ones collected.
Twos	Elapsed total number of twos collected.
Fives	Elapsed total number of fives collected.
Tens	Elapsed total number of tens collected.
Twenties	Elapsed total number of twenties collected.
Collection Date/Time	Date and time of collection.

Table 9.3 Cash CTS Dispensed Interval Counters Report

Field Name	Explanation
Location	Location of collection
Machine	Collected machine ID
Card Value	Interval (since last collection) total for dollars sold on dispensed cards (does not include deposit cost)
Card Cost	Interval total for dollars collected for card deposit.
Cards Disp	Interval total for number of cards dispensed.
Bills	Interval total number of bills collected by machine.
Bill Value	Interval total value of currency collected by machine.
Ones	Interval total number of ones collected.
Twos	Interval total number of twos collected.
Fives	Interval total number of fives collected.
Tens	Interval total number of tens collected.
Twenties	Interval total number of twenties collected.
Collection Date/Time	Date and time of collection.

Table 9.4 Cash CTS Elapsed Card Counters Report

Field Name	Explanation
Location	Location of collection
Machine	Collected machine ID
Card Loaded	Elapsed total number of cards revalued by machine.
Bills	Elapsed total number of bills collected by machine.
Bill Value	Elapsed total value of currency collected by machine.
Ones	Elapsed total number of ones collected.
Twos	Elapsed total number of twos collected.
Fives	Elapsed total number of fives collected.
Tens	Elapsed total number of tens collected.
Twenties	Elapsed total number of twenties collected.
Collection Date/Time	Date and time of collection.

Table 9.5 Cash CTS Interval Card Counters Report

Field Name	Explanation
Location	Location of collection
Machine	Collected machine ID
Card Loaded	Interval (since last collection) total number of cards revalued by machine.
Bills	Interval total number of bills collected by machine.
Bill Value	Interval total value of currency collected by machine.
Ones	Interval total number of ones collected.
Twos	Interval total number of twos collected.
Fives	Interval total number of fives collected.
Tens	Interval total number of tens collected.
Twenties	Interval total number of twenties collected.
Collection Date/Time	Date and time of collection.

9.4.6. Deleting Collection Reports

It is recommended to periodically purge the collection data so that it will not take up unnecessary disk space on your computer.

1. Click the View/Print/Delete button (Figure 9.22).

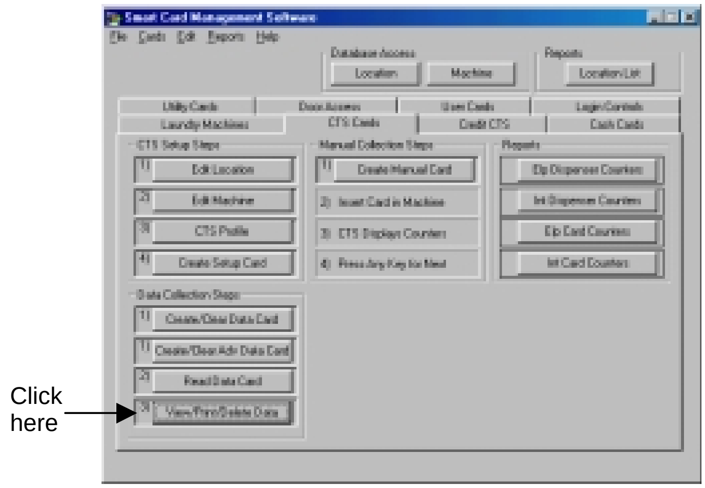

Figure 9.22 To Open the Data Collected Window

2. Select the collection records to delete (Figure 9.23).
3. Select Delete Selected Records from the Edit drop-down menu (Figure 9.23).

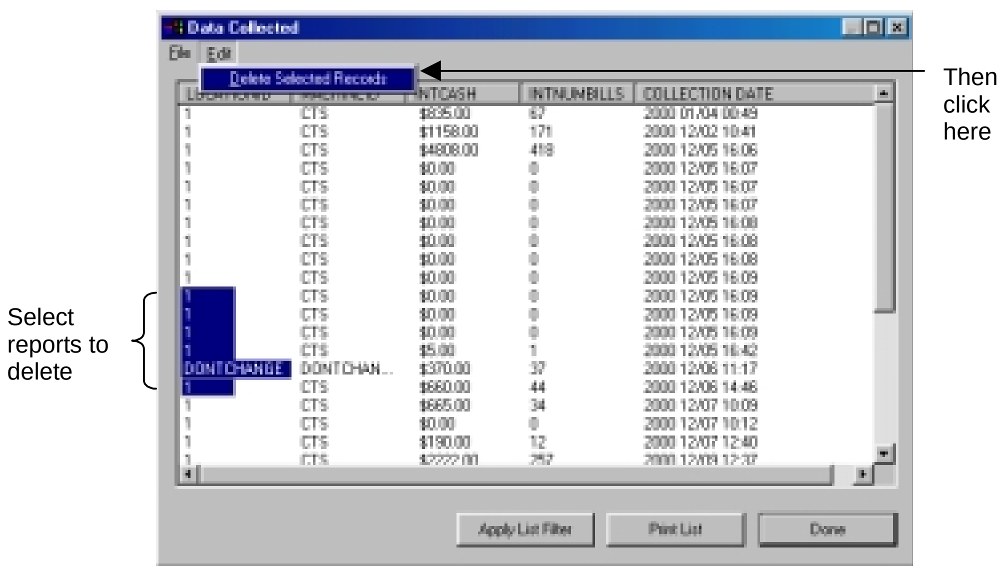

Figure 9.23 Deleting the Collection Records

4. A confirmation window will appear. Click the Yes button to proceed or the No button to cancel.

9.4.7. Manual Data Collection

A Manual Data Collection card is used to view the transaction information on the display of the Cash CTS.

In order for the Manual Data Collection card to function, the "Manual Data Collection Card" option in the Cash CTS profile must be enabled. If the "Clear Counters" option has been enabled as well, the data will be deleted after it is displayed. Otherwise, it can be collected with a Data Collection card at a later time.

Warning!

The Manual Data Collection card **does not** actually collect the data from the Cash CTS. If the "Clear Counters" option is enabled in the profile of the Cash CTS from which you are collecting the data will be lost after it is displayed.

9.4.7.1. Creating a Manual Data Collection Card

1. Insert a Management Card into the PC Reader (Section 2.4.2).
2. Click the Create Manual Card button in the CTS Cards Manager (Figure 9.24)

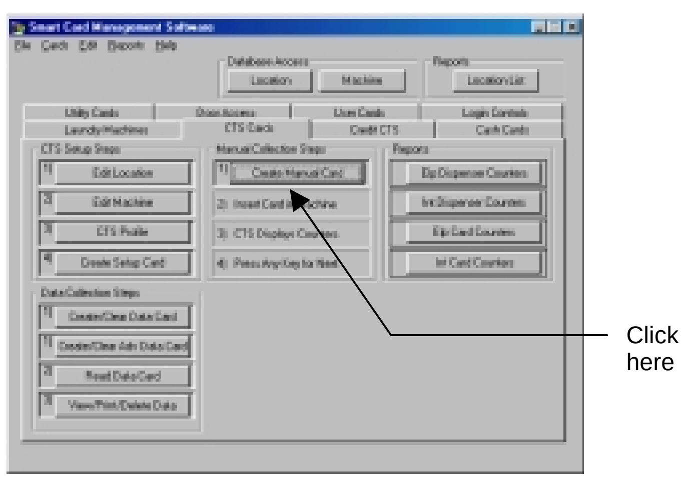

Figure 9.24 Creating a Manual Data Collection Card

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Credit CTS Manager 10

10.1.1. Overview

The Credit Card Transaction Station (Credit CTS) allows for a cash-free vending enviroment. Instead of using coins for commercial laundry applications, or cash to purchase smart cards, customers use their major credit or debit cards to purchase valued smart cards or add value to existing cards.

This further reduces the cost of handling money and the expense associated with vandalism, as with this system there is no cash on the premises.

10.1.1.1. Credit CTS Operation

The Credit CTS is typically located near the laundry area where the valued cards will be used. Customers simply swipe their credit or debit cards and select one of three predetermined monetary values to add to their card. The transaction is approved via a modem, and purchased amount is then transferred to the smart card.

Programming the Credit CTS and data collection can be accomplished through a modem connection or a direct serial PC connection.

10.1.1.2. The Setup Process

There are four steps necessary to setup the CTS:

1. Define Locations (see chapter 5).
2. Enter Credit CTS information into the Machine Manager (see chapter 7).
3. Create a Credit CTS profile (covered in this chapter, Section 10.1.2).
4. Program this information into the Credit (covered in this chapter, Section 10.1.3).

Combo Box Users:
To setup a Combo Box, a profile must be entered and filled out in the Credit CTS Manager. Then the **same** profile must be edited in the CTS Cards Manager (Section 9.2) and the machine is setup in the same manner as a Credit CTS.

10.1.2. Credit CTS Profiles

Credit CTS Profiles are entered and edited in the Credit Profile window.

10.1.2.1. Opening the Credit Profile Window

To open the Credit Profile window click the Create Profile button in the Credit CTS Manager (Figure 10.1).

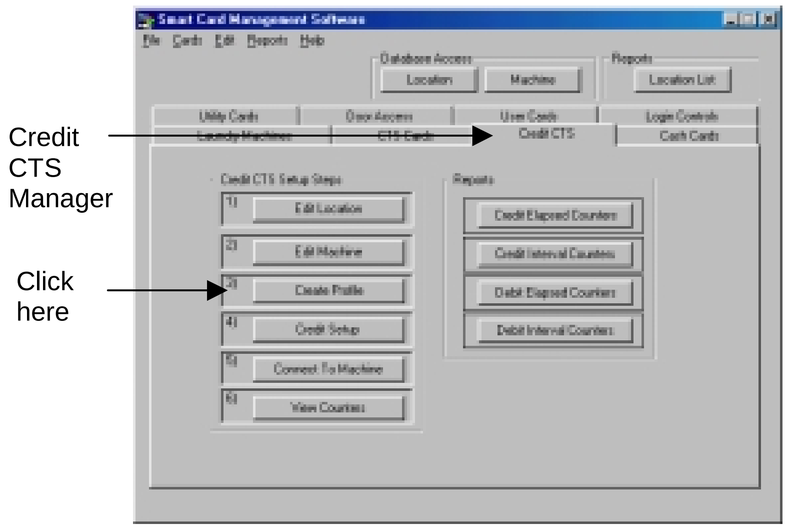

Figure 10.1 Opening the Credit Profile Window

10.1.2.2. The Credit Profile Window Interface

The Credit CTS Profile Manager record is made up of three basic components (Figure 10.2):

- The **Profile List Window** lists all CTS profiles in the software. The records are sorted by the Profile Name.
- The **Main Body** of the record contains the profile information specified by the system user.
- **Command Buttons** for the most commonly used features have been included for ease of use.

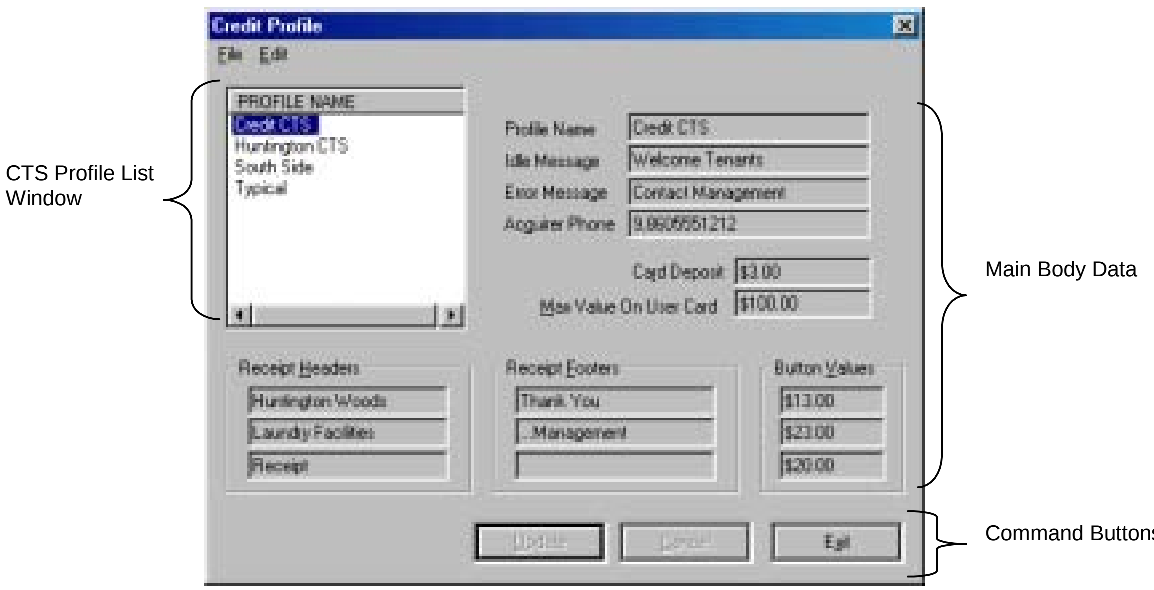

Figure 10.2 Credit CTS Profile Record Interface

Table 10.1 describes each field in the Credit CTS Profile Manager, and identifies field restrictions.

Table 10.1 Credit CTS Profile Manager Fields

Field Name	Description	Restrictions
Profile Name	Required unique field creating an identity for the profile.	Any alphanumeric combination up to 30 characters in length
Idle Message	Message displayed on Credit CTS while not in use.	Up to 20 characters
Error Message	Message displayed on Credit CTS while in error mode.	Up to 20 characters
Acquirer Phone	Number of the clearing house for Credit CTS to dial for credit card transactions.	To be entered exactly as dialed. Use commas for pausing (example: 9,18605551212)
Card Deposit	Sets cost for purchasing new cards.	Currency field
Max Value on User Card	Sets the maximum value a user can have on their card. Credit CTS will not allow a transaction to occur if customer has already reached this limit.	Currency field
Receipt Header	Three lines of text to be printed on top of the customer credit card receipt.	Up to 20 characters on each of the 3lines.
Receipt Footer	Three lines of text to be printed at the bottom of the customer credit card receipt.	Up to 20 characters on each of the 3lines.
Button Values	Sets the value for each of the three buttons located on the Credit CTS. These are the only values that a customer can purchase.	Currency fields

10.1.2.3. Adding a Profile

1. In the Credit CTS tab, click the Create Profile button (Figure 10.3).

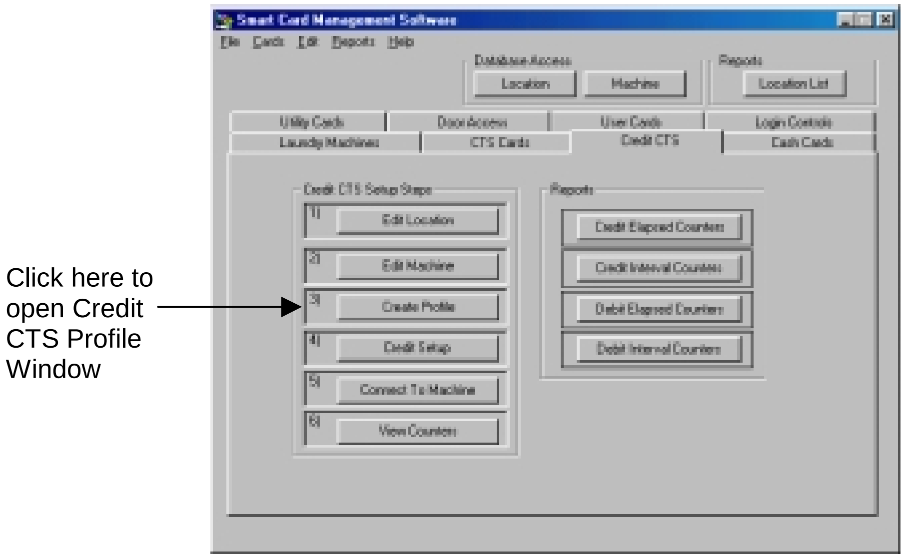

Figure 10.3 Opening the Credit CTS Profile Window

2. Select Add New Profile from the edit drop-down menu (Figure 10.4).

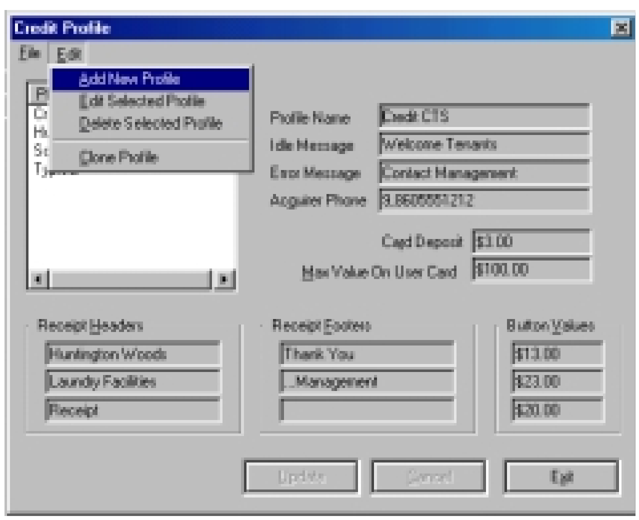

Figure 10.4 Adding CTS Profile

3. Enter data into fields (see Table 10.1)
4. Verify that all data has been entered correctly; click the Update button to save the new profile (Figure 10.5).

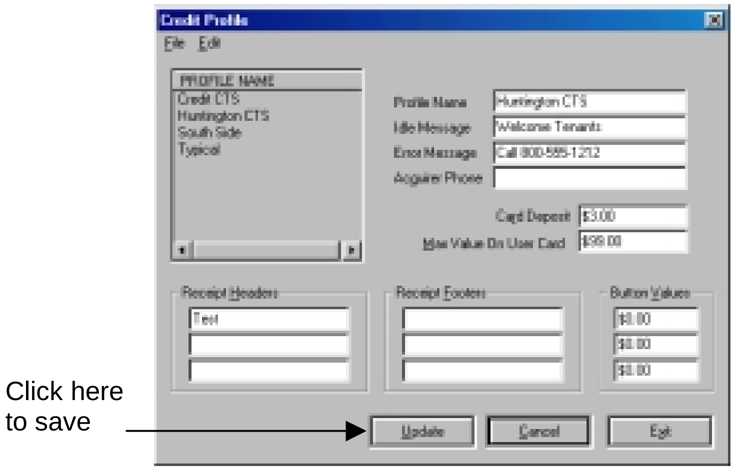

Figure 10.5 Completing/Saving the Credit CTS Profile

10.1.2.4. Editing a Profile

1. In the Credit CTS tab, click the Create Profile button (Figure 10.3).
2. Click on the profile to edit in the Profile List Window (Figure 10.6).
3. Select Edit Selected Profile from the Edit drop-down menu (Figure 10.6).

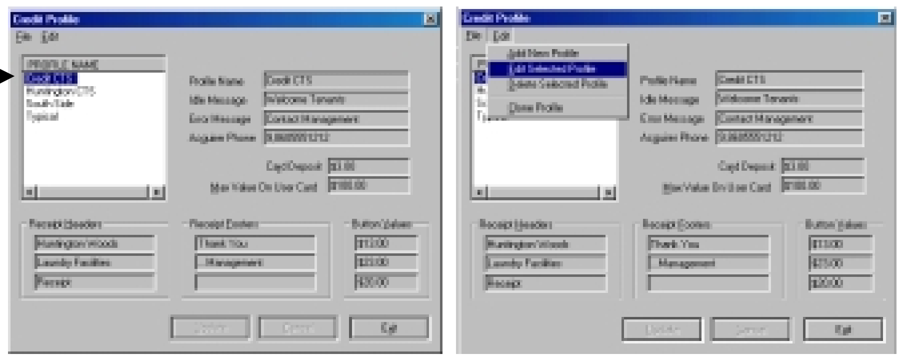

Figure 10.6 Editing a Credit CTS Profile

Tech Tip

Steps 2 and 3 can be avoided by simply double clicking on the profile to be edited from the Profile List Window.

---

4. Make any necessary changes.
5. Verify that the new information is correct, and click the Update button to save changes (Figure 10.5).

10.1.2.5. Deleting a Profile

Warning!

A deleted profile cannot be recovered. Be sure that the profile being deleted will not be needed anymore as it may affect machine setup.

1. In the Credit CTS tab, click the Create Profile button (Figure 10.3).
2. Click the profile to delete from the Profile List Window (Figure 10.7).
3. Select Delete Selected Profile from the Edit drop-down menu (Figure 10.7).

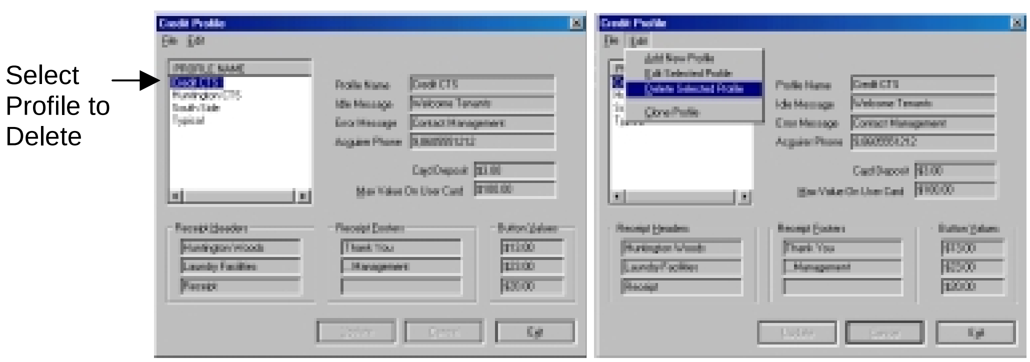

Figure 10.7 Deleting a Credit CTS Profile

10.1.2.6. Cloning a Profile

The cloning feature has been included with SMS2 as a time saving feature for adding multiple profiles with similar information.

The cloning feature allows the system operator to copy all of the information for an existing profile in the database except for the Profile Name field. Once a profile is cloned, the operator enters a new Profile Name, and the profile information is saved as a new record.

1. In the Credit CTS tab, click the Create Profile button (Figure 10.3).
2. Click the profile to clone from the Profile List Window (Figure 10.8).
3. Select Clone Profile from the Edit drop-down menu (Figure 10.8).

Select Profile to Clone

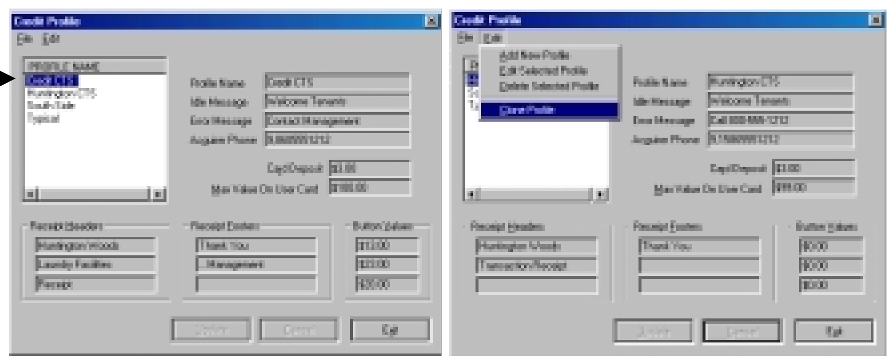

Figure 10.8 Cloning a Credit CTS Profile

4. Enter a new Profile Name (Figure 10.9).
5. Click the Update button to save the new profile record (Figure 10.9).

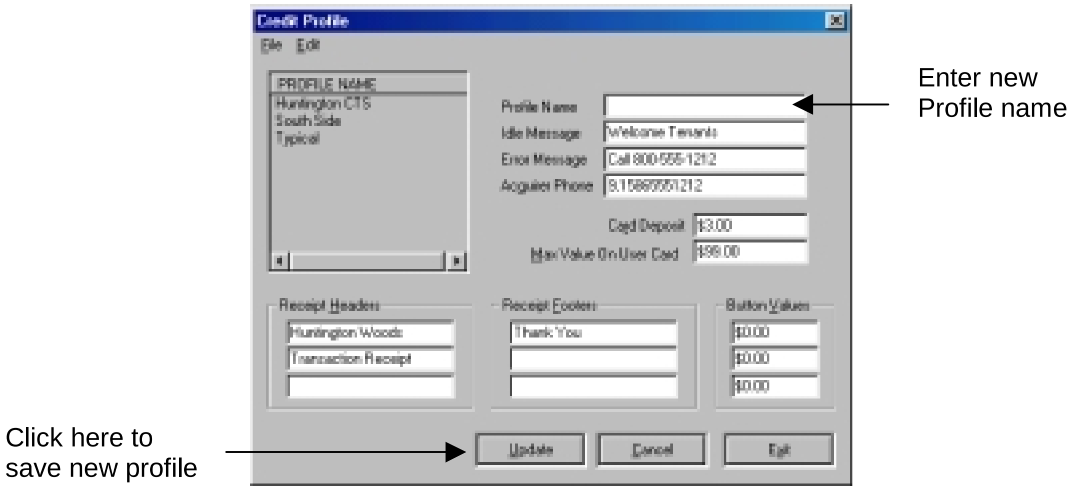

Figure 10.9 Completing the Cloning Process

10.1.3. Setting Up and Collecting the Credit CTS

Once the location, machine and profile information have been entered, the Credit CTS can be set up and collected.

To setup or collect data from the Credit CTS:

1. Define the Credit Setup.
2. Connect to the Credit CTS via a modem or direct serial connection.

10.1.3.1. Creating or Editing the Credit Setup

1. Click the Credit Setup button in the Credit CTS tab (Figure 10.10).

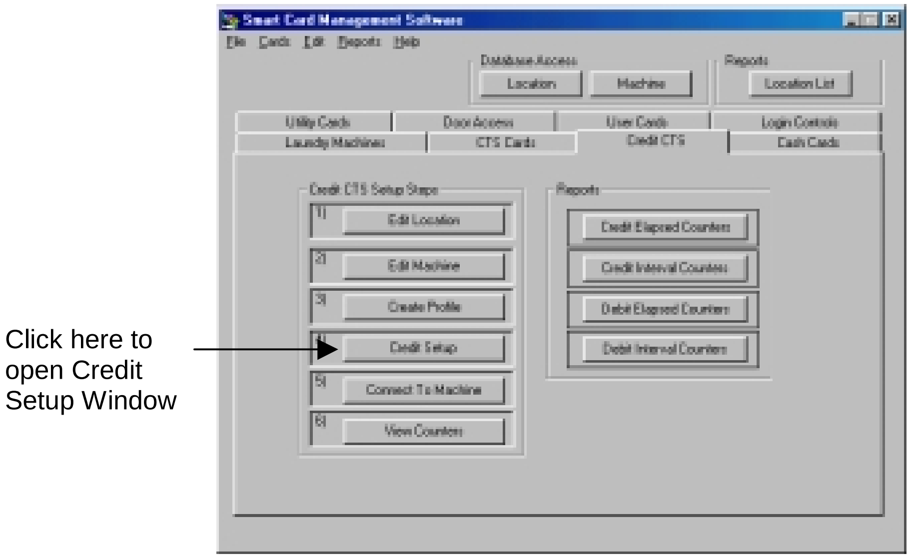

Figure 10.10 Opening the Credit Setup Window

2. Select a machine from the drop-down menu to setup or edit (Figure 10.11).
3. Enter the dial up phone number of the Credit CTS exactly as it is to be dialed (Figure 10.11).
4. Enter the Terminal ID (this number is assigned by the credit transaction clearing house being used) (Figure 10.11).
5. Enter the current password. If this is the first time the machine is being programmed enter ten zeros for the password (0000000000) (Figure 10.11).
6. Enter a new password if changing the password. If the password is not being changed, enter the password in Step 5 for verification (Figure 10.11).
7. Select a profile from the drop-down menu to be used for this machine (Figure 10.11).
8. Click on the Machine Active option to enable machine (Figure 10.11).
9. Click on the Dispenser Active option if machine model is equipped with a dispenser (Figure 10.11).
10. Click the update button to save the new information (Figure 10.11).

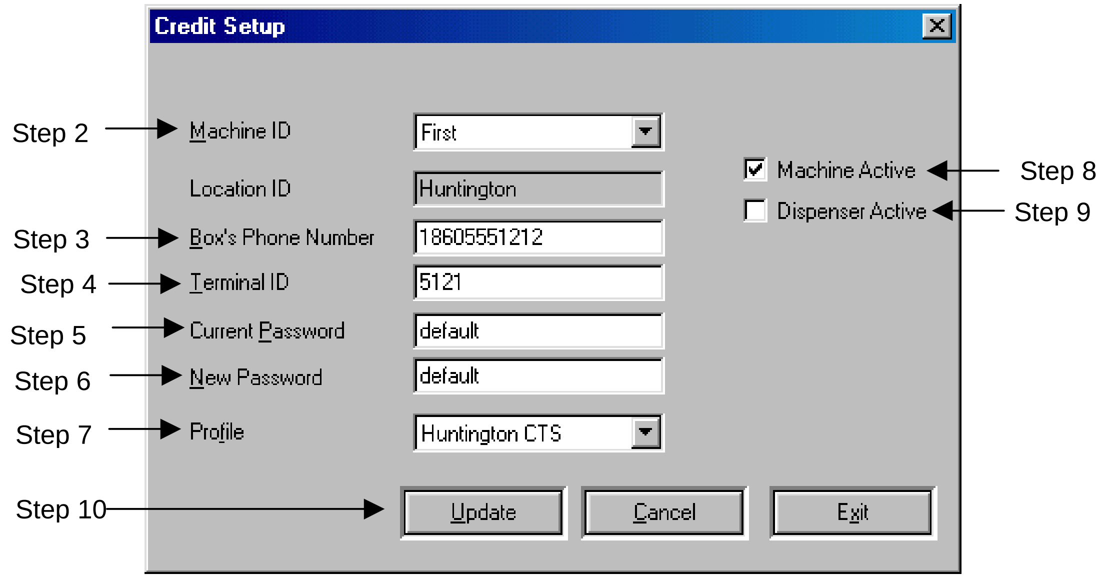

Figure 10.11 The Credit Setup Steps

10.1.3.2. Downloading/Uploading Credit CTS Information

1. Click the Connect to Machine button in the Credit CTS tab (Figure 10.12).

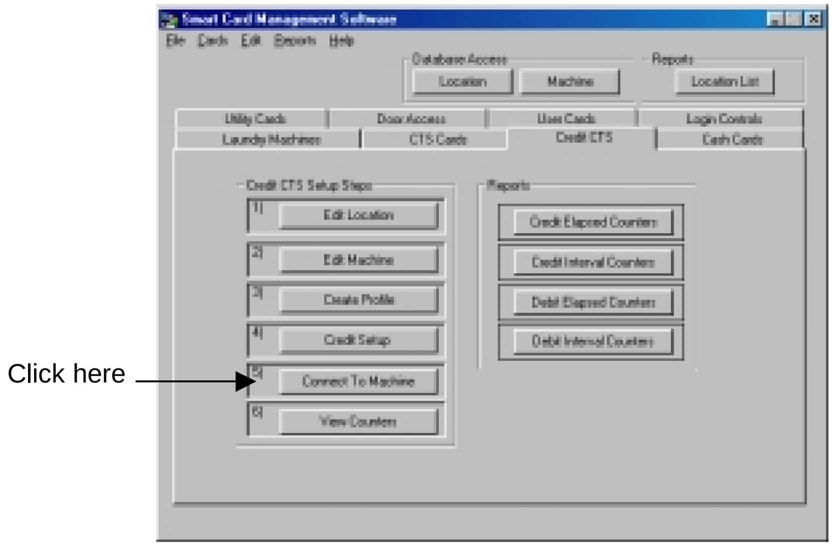

Figure 10.12 Connecting to the Machine

2. Select method of connecting to the Credit CTS (Figure 10.13):
   - If using the “Modem” option, select the assigned COM Port (communications port) for your modem (refer to your PC/Windows documentation) and select the “Wait for Dial Tone” option if necessary with your telephone system.
   - If using the “Direct” option (direct connection), select the COM Port used for your serial connection (refer to your PC/Windows documentation) and connect serial port to Credit CTS using a serial cable.
3. Select the Machine to program (Figure 10.13).

4. Select those functions to activate during the connection (Figure 10.13).
   - "Send Setup" will send Location, Machine, and Credit CTS Profile information.
   - "Send Receipt Header/Footer" will send any updated receipt information only.
   - "Send Modem Initialization String" is used the first time the Credit CTS is set up to initialize the modem in the Credit CTS (refer to Credit CTS documentation).
   - "Get Counters/Transactions" downloads transaction data from the Credit CTS to be used for report generation.
   - "Clear Counters/Transactions After Collection" is used to clear interval counters after collection.

5. Click the Start button (Figure 10.13).

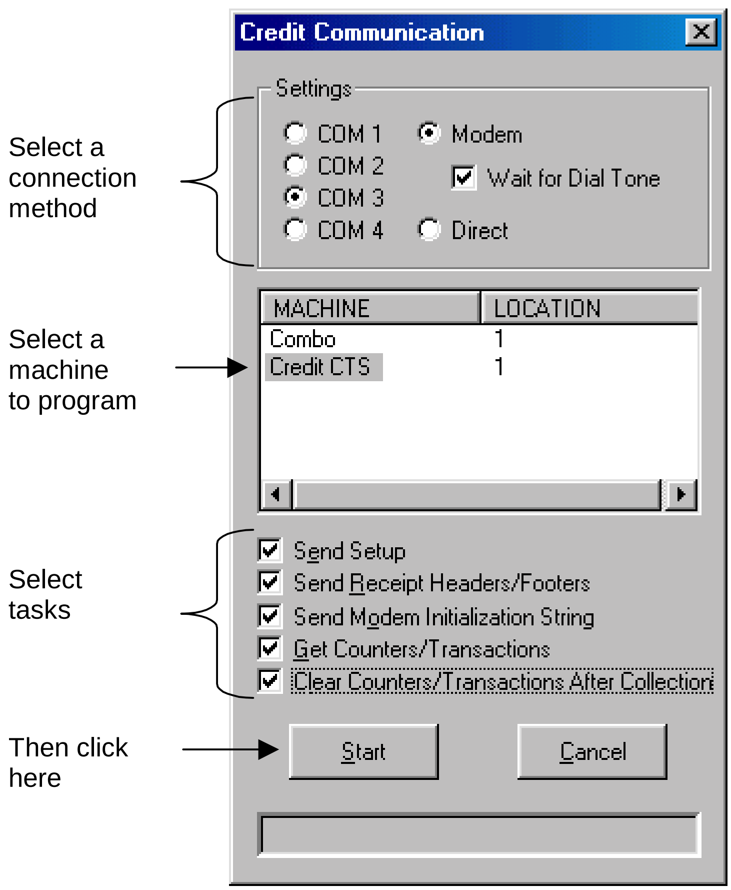

Figure 10.13 Connecting to the Credit CTS

10.1.4. Credit CTS Reports

There are four reports available from the Credit CTS Manager:

1. The Credit Elapsed Counter report shows the overall totals for credit card transactions.
2. The Credit Interval Counter report shows the interval (the totals for each collection period) for credit card transactions.
3. The Debit Elapsed Counter report shows the overall totals for debit card transactions.
4. The Debit Interval Counter report shows the interval (the totals for each collection period) for debit card transactions.

Each report provides the following information:

- **Location –** location where the transaction took place.
- **Machine –** machine identification.
- **Card Value –** total monetary value for recharged Cash Cards.
- **Dispensed Card Value –** total monetary value for dispensed Cash Cards.
- **Card Dispensed –** number of cards that were dispensed.
- **Card Cost –** portion of the money that went towards the card cost rather than the value added to Cash Cards.
- **Cards Loaded –** number of cards that were recharged.
- **Collection Date/Time –** date and time of the collection.

10.1.4.1. Viewing and Printing Credit CTS Reports

1. Open a desired report in one of two ways:
   - Click on the desired report button in the Credit CTS Manager.
   - Select the desired report from the Credit CTS sub menu of the Reports drop-down menu in the main window.

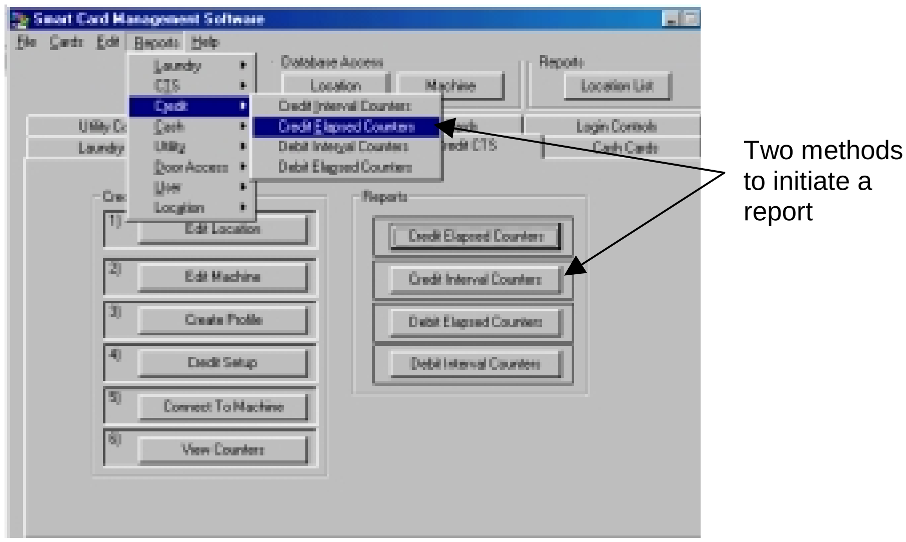

Figure 10.14 Opening a Credit CTS Report

2. A window specifying a date range will appear (Figure 10.15). Enter the beginning and ending collection dates for the desired report. Select the “No upper Bound” option to view a report containing all transactions since the “Start of range” field value or select the “No lower Bound” option to view a report containing all transactions leading up to the “End of range” value.

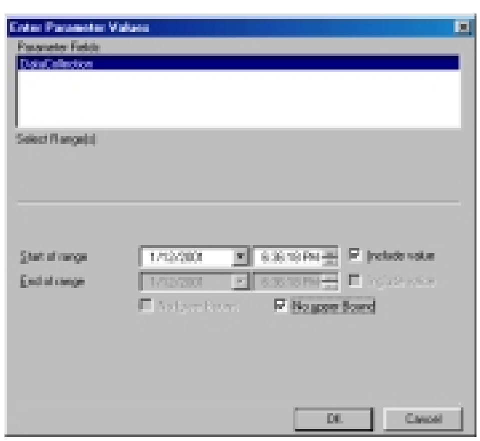

Figure 10.15 Date Range Window

3. The report will be generated and appear on your screen. View it on the screen, or click the printer icon to print the report (Figure 10.16).

Click here to print report

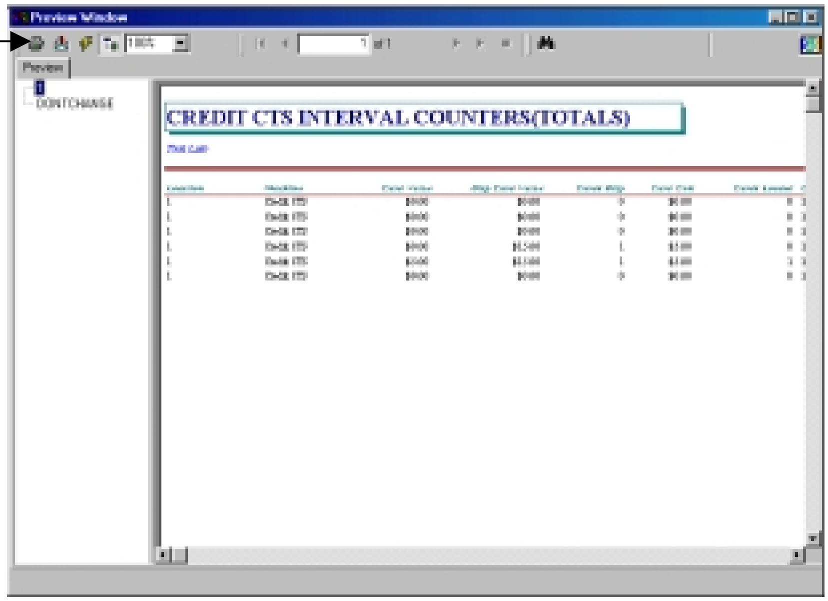

Figure 10.16 Credit CTS Report Window

DOOR ACCESS MANAGER

11

Overview

Along with SMS2, the Greenwald Intellicard Door Access Readers are used to control door entry.

The Door Access Readers are installed in the vicinity of the entry point and are integrated with a low voltage electric locking device such as an electric strike or magnetic lock (refer to the Door Access Reader documentation for further details). Once the installation is complete, the reader setup information is entered into the Door Access Manager and Setup Cards are created and used to program the Door Access Readers.

Users of the Door Access Readers may be issued Door Access or User Cards that define the specific location or areas within a location to which access will be granted. In other cases, users may use their existing cards to access entry points within a location.

Once the Door Access system is up and running access privileges can be changed at any time by either issuing the user a new card or by updating the list of valid users at the Door Access Reader.

The Door Access Manager also has the ability to create Data Collection cards for the Door Access Reader. Once the data is collected, user access reports can be viewed or printed.

11.1. The Setup Process

Before entering data into the Door Access Manager it is important to understand how it works. After understanding the multiple ways to restrict and grant access, a strategy for setting up a facility can be formulated.

11.1.1. Understanding Door Access Restrictions

The Door Access Manager uses several criteria for restricting access:

11.1.1.1. Locations

Each user entered into the database is assigned to a specific location. A Door Access Reader will only permit access to individuals with a Door Access or User Card programmed with the same location identification as the reader. The only exception is a Master Card, which can access any location managed by the SMS2 software from which it was issued.

11.1.1.2. Areas

Areas allow further access restriction within a location. Each Location can be set up with as many as eight areas. When a Door Access or User Card is created the system administrator selects the areas to which the user will have access. Door Access Readers are assigned to an Area and will only permit access to those users allowed to enter the specified Area. An area can include one or more readers, which is useful when more than eight entry points are being managed in one location.

11.1.1.3. Time Restrictions

Each Door Access Reader can be programmed to restrict access at certain times of the day on specified days of the week. When a User Card is created the system administrator can select whether or not to have time restrictions apply.

11.1.1.4. Active/Inactive Access

A user’s access privileges can be suspended at any time. This can be accomplished without their knowledge or permission and requires reprogramming of all the readers to which the user had access with a Reader User List Card.

11.1.2. Choosing a Door Access System

There are two ways to set up Door Access Readers:

11.1.2.1. Standard Door Access System

In the standard system, Locations (Section 11.1.1.1) is the only criterion used for access restriction. Users with any valid Cash Card, Door Access Card or User Card will have access to the reader if the location identification on the card is the same as that programmed to the reader.

This system is easy to manage because updating the reader every time users' restrictions are altered or new users are assigned to the software is unnecessary. In this system time restrictions, access reports and the ability to eliminate a single user's access are not available.

This system is ideal for simple applications such as allowing all the tenants and employees of an apartment building access to a laundry room at any time.

11.1.2.2. Advanced Door Access System

To benefit from the multiple restriction criteria described in section 11.1.1 the Advanced Door Access System needs to be implemented. In this system each user must be entered into the system with their access privileges or restrictions defined before a Door Access or User Card is issued to them.

This system is ideal for providing flexible control over door access. However when using this system, whenever there is a change to the Door Access Manager database, all Door Access Readers which will be affected by the change will have to be reprogrammed

11.1.3. Standard System Setup Steps

The following is the order of setting up the User Cards and Door Access Readers when choosing to utilize the Standard Door Access System:

11.1.3.1. Step One: Add or Edit Location

In the Door Access Location List window (Figure 11.1) new locations can be added and their areas defined. Locations that were set up previously can be edited to include Areas.

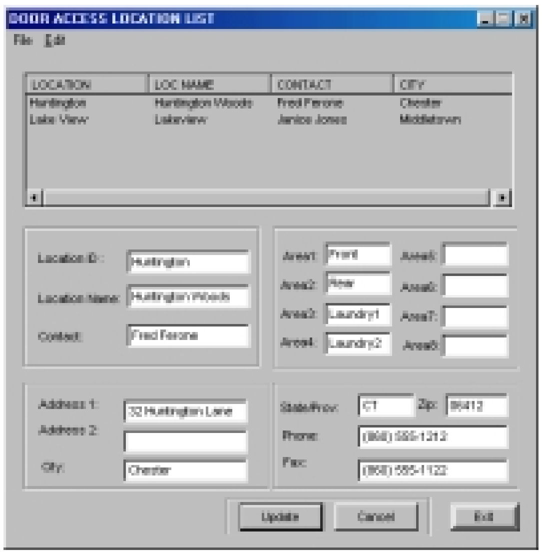

Figure 11.1 Door Access Location List Window

11.1.3.2. Step Two (Optional): Add or Edit User Profiles

In the Standard Door Access System any valid Cash Card, Door Access Card or User Card with a location that corresponds to the Door Access Reader will work. Therefore it is not necessary to issue Door Access Cards if other card types are being used. If a card needs to be issued, the Door Access Profile window (Figure 11.2) can be utilized to accomplish this. It is important to remember that in this system access records are not tracked even if the user has been entered into the database.

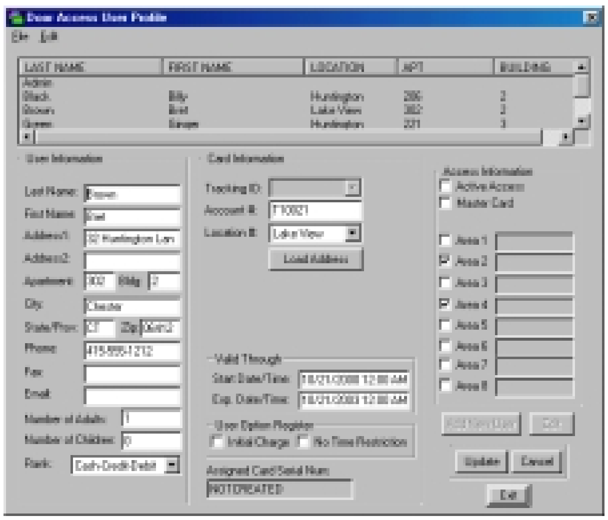

Figure 11.2 Door Access User Profile Window

11.1.3.3. Step Three (Optional): Create User Cards

If User Profiles are being used (See Step Two), User Cards are created in the Door Access User Card Manager (Figure 11.3).

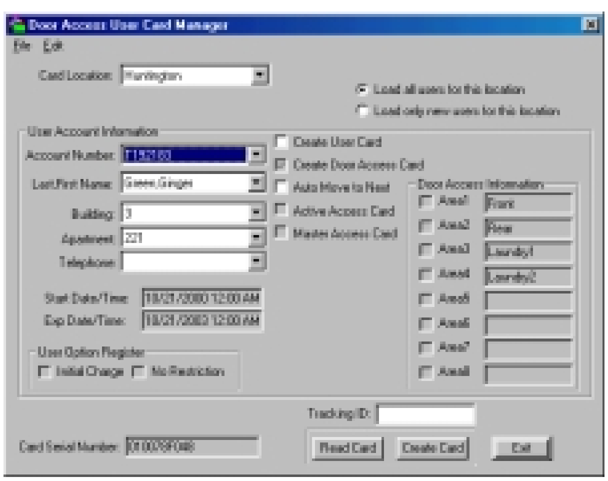

Figure 11.3 Door Access User Card Manager

11.1.3.4. Step Four: Create Reader Setup Card

The Reader Setup window (Figure 11.4) creates the setup card to program the Door Access Reader. In this step a location identification to be associated with the reader is assigned.

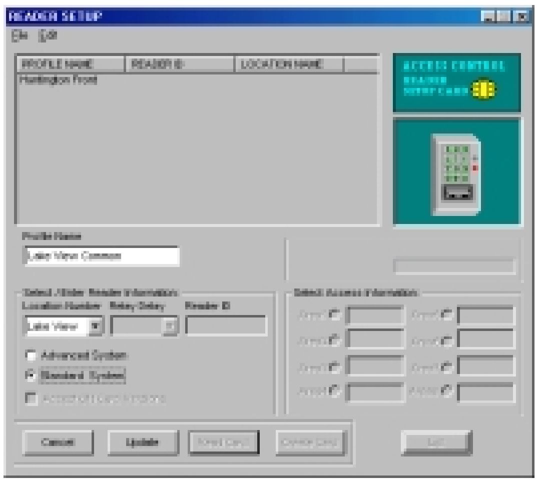

Figure 11.4 Reader Setup Window

11.1.4. Advanced System Setup Steps

The following is the order of setting up the Door Access User Cards and the Door Access Readers when choosing to utilize the Advanced Door Access System:

11.1.4.1. Step One: Add or Edit Location

In the Door Access Location List window (Figure 11.5) new locations can be added and their Areas defined. Locations that were previously set up can be edited to include Areas.

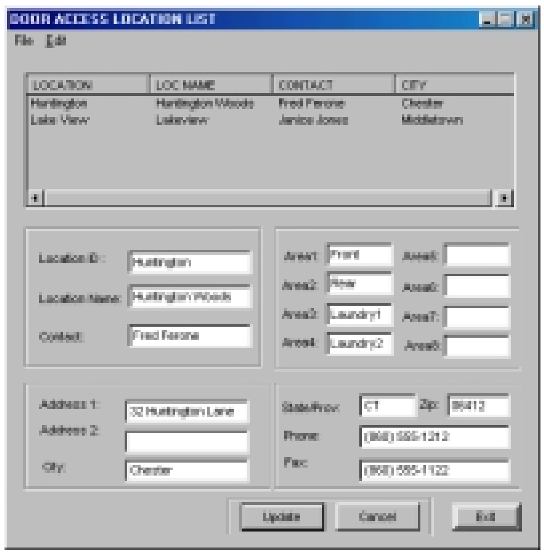

Figure 11.5 Door Access Location List Window

11.1.4.2. Step Two: Add or Edit User Profiles

In the Door Access User Profile window (Figure 11.6) each user's information is entered. In addition to the user contact information such as name, address and telephone number the following access privilege information is entered:

- Location to be associated with the user.
- Area or areas accessible to the user.
- Optional user time restrictions.
- Active or Inactive Access status of user.
- Master Card Privileges
- Access expiration date
- Initial Charge User Option (See Chapter 9)

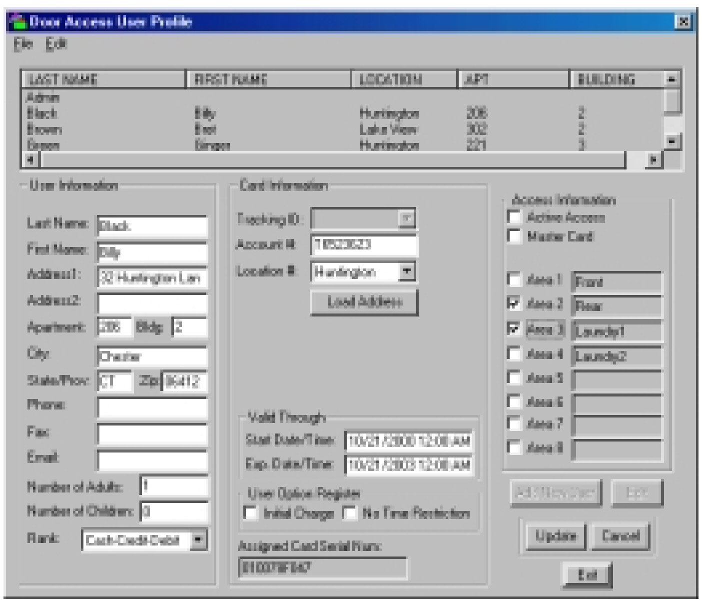

Figure 11.6 Door Access User Profile Window

11.1.4.3. Step Three: Create User Cards

The Door Access User Card Manager (Figure 11.7) is used to set up user account information and door access information. It is also used to create and read Door Access and User Cards.

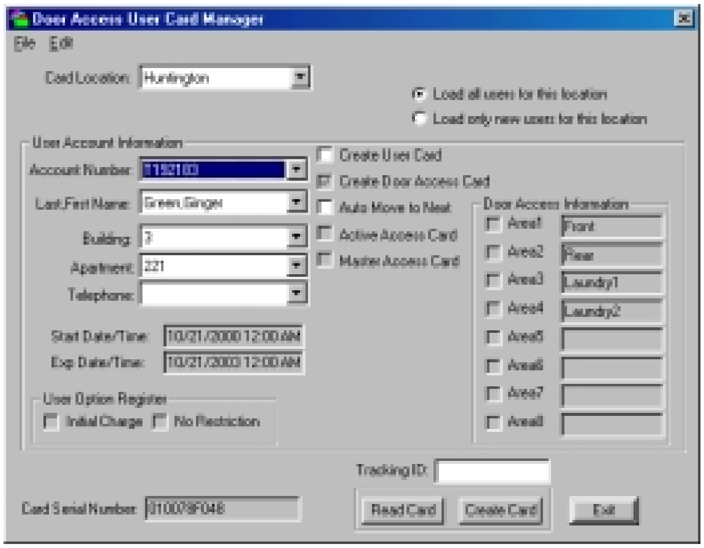

Figure 11.7 Door Access User Card Manager

11.1.4.4. Step Four: Create Reader Setup Card

In the Reader Setup window (Figure 11.8) the setup card to program the Door Access Reader is created. In this step you will assign both location identification and an area number.

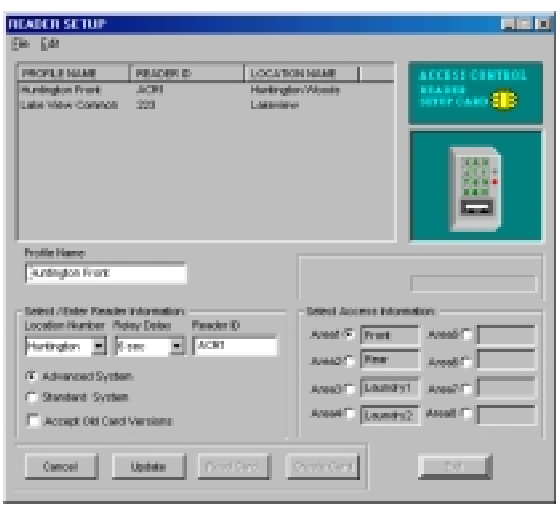

Figure 11.8 Reader Setup Window

11.1.4.5. Step Five: Create User List Card

The User List Card transfers all of the valid users assigned to a Door Access Reader. This card is not only used during the initial setup process, but also to update the Door Access Reader any time a change is made to the database (Figure 11.9).

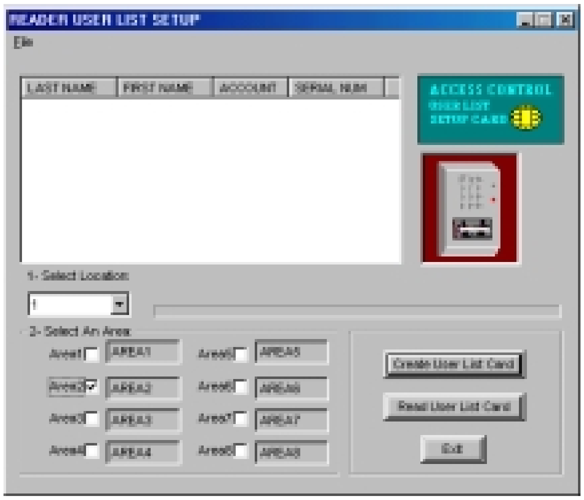

Figure 11.9 Reader User List Setup Window

11.1.4.6. Step Six: Create Reader Time Card

In the Time Card window (Figure 11.10) a card to set the time in the Door Access Reader is created. This is an important step if access reports will be viewed at a later time or if using time restrictions.

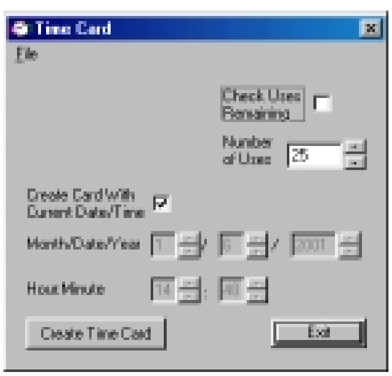

Figure 11.10 Time Card Window

11.1.4.7. Step Seven (Optional): Create Reader Restriction Card

In the Door Access Restriction Time window (Figure 11.11) access can be further restricted to specified users using the time of day and days of the week.

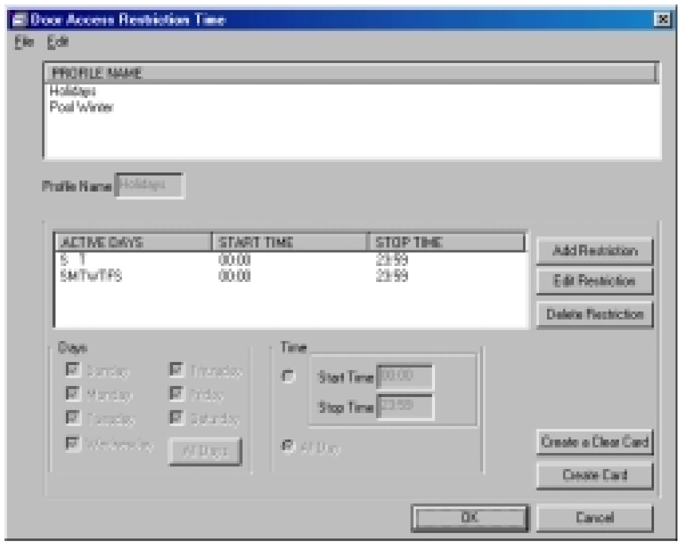

Figure 11.11 Door Access Restriction Time Window

11.1.5. Working with Locations

Locations are the fundamental building blocks of the SMS2 database and the primary restriction criterion in Door Access. New locations can be created in the Door Access Location List window and existing locations can be edited to include additional information needed for the Door Access Manager.

Note:
When setting up the database to run a "Standard System" it is not necessary to add any additional information to **existing** locations.

11.1.5.1. Opening the Door Access Locations List Window

To open the Door Access Locations List Window click the Add/Edit Location button in the Door Access Manager (Figure 11.12).

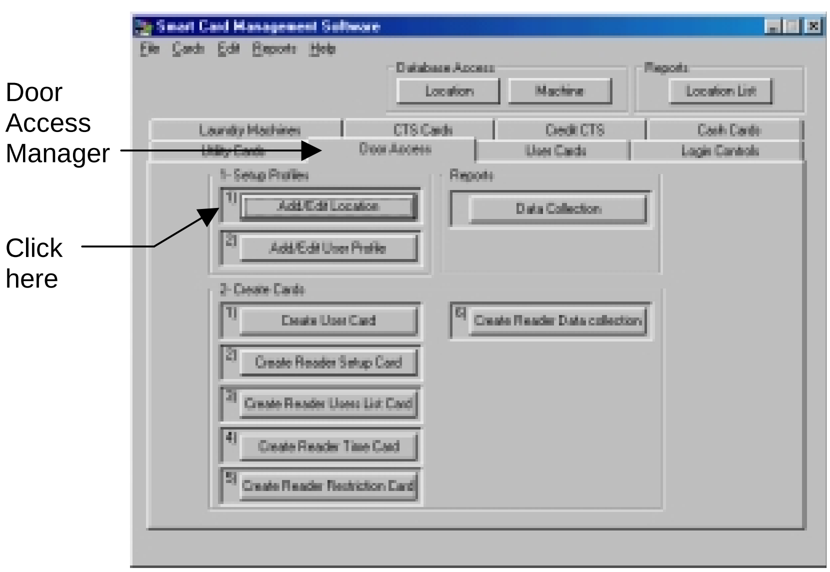

Figure 11.12 Opening the Door Access Locations List Window

11.1.5.2. The Door Access Locations List Window Interface

The Door Access Locations List Window consists of three basic components (Figure 11.13).

1. The **Location List Window** lists all the Locations entered into the software. The Location ID, Location Name, Contact and the City of the Location are listed for easy identification and sorting.
2. The **Main Body** of the window contains the Location information: Location ID, Location Name, Area Identifiers, as well as address and contact information.
3. **Command buttons** for the most commonly used features have been included for ease of use.

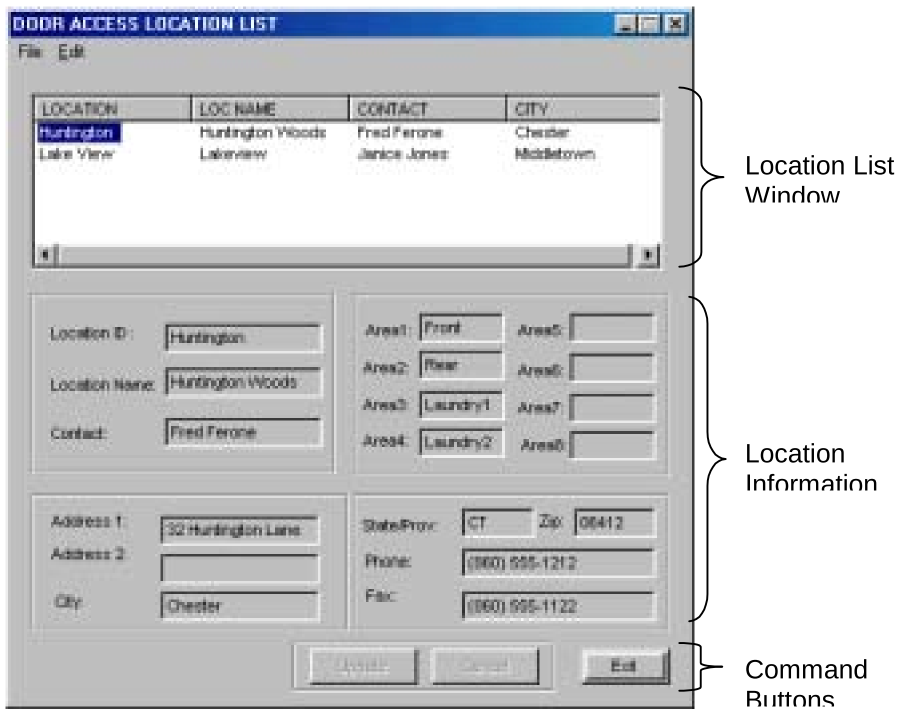

Figure 11.13 Door Access Location List Interface

Table 11.1 describes each field in the Door Access Location List window and identifies the field restriction.

Table 11.1 Door Access Location List Fields

Field Name	Description	Restrictions
Location ID	Required unique field containing an identity for the location. This identification is used for door entry restrictions, in reports, machine setup cards and all other functions utilizing Locations.	Any alphanumeric combination up to ten characters in length
Location Name	Name of Location	Up to 32 characters
Address1	Address of Location	Up to 32 characters
Address2	Address of Location	Up to 32 characters
City	City of Location	Up to 16 characters
State/Prov	State or Province of Location	Up to 16 characters
Zip	Postal code of Location	Up to 16 characters
Contact	Name of contact at Location	Up to 32 characters
Phone	Phone number for Location	Up to 16 characters
Fax	Fax number for Location	Up to 16 characters
Area 1 – Area 8	A secondary criteria for access restriction. When using the Advanced Setup each user is assigned to any number of areas within a location and each Door Access Reader is assigned to an Area. You can have up to eight Areas at each Location.	Any alphanumeric combination up to ten characters in length

11.1.5.3. Adding a Location

1. In the Door Access Location List window select Add New Location from the Edit drop-down menu (Figure 11.14).
2. Enter data into the appropriate fields (Table 11.1).
3. Verify that the data entered is accurate and click the Update button to save (Figure 11.14).

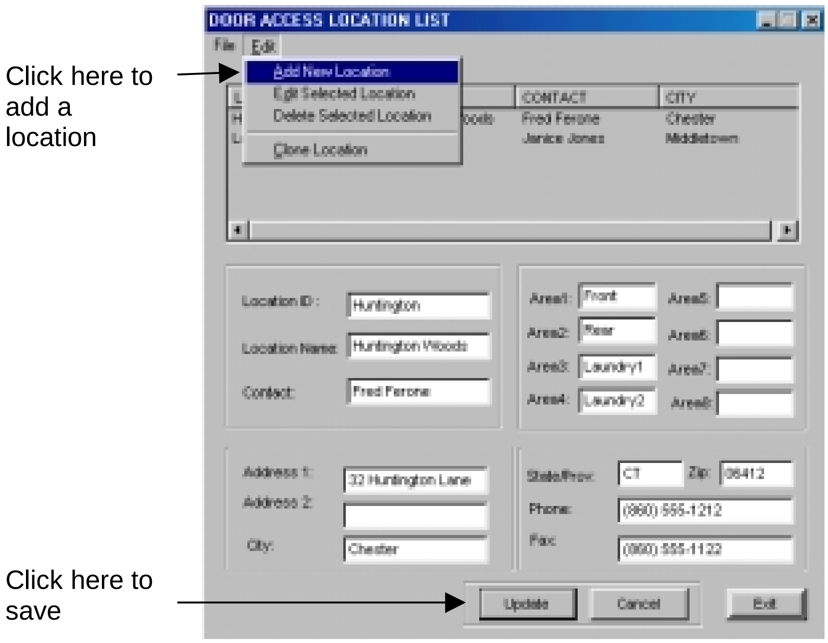

Figure 11.14 Adding a Location

11.1.5.4. Editing a Location

1. In the Door Access Location List Window select the location to edit from the Locations List Window (Figure 11.15).
2. Select Edit Selected Location from the Edit drop-down menu (Figure 11.15).

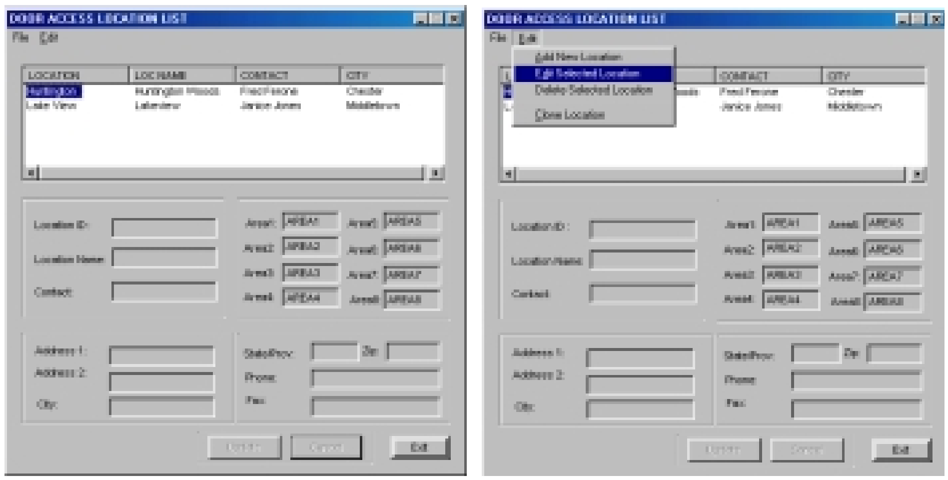

Figure 11.15 Editing a Location

Tech Tip

The first two steps can be avoided by simply double clicking on the location to be edited from the Locations List Window.

---

3. Enter the necessary changes or additions such as the Area identification fields.
4. Verify that the new information is accurate and click the Update button to save your changes (Figure 11.16).

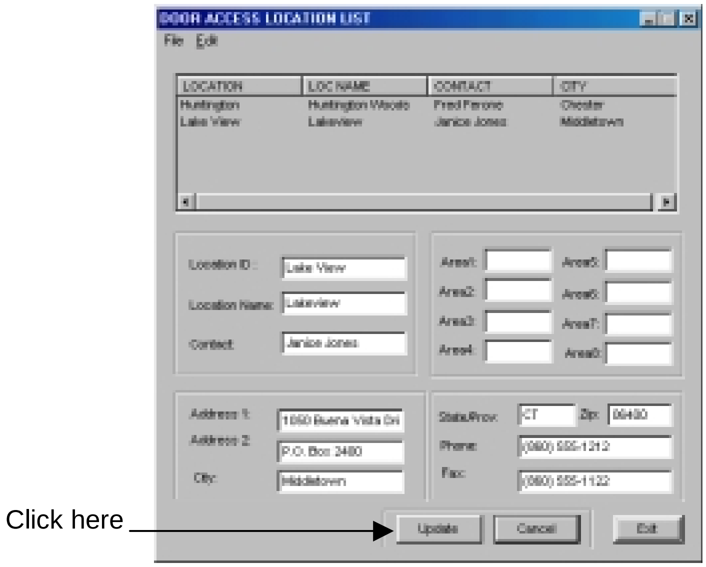

Figure 11.16 Updating an Edited Location

11.1.5.5. Deleting a Location

Warning!

A deleted Location cannot be recovered.

1. In the Door Access Location List window click the location you wish to delete from the Locations List Window (Figure 11.17).
2. Select Delete Selected Location from the Edit drop-down menu (Figure 11.17).
3. A confirmation window will appear, click Yes to continue or No to cancel.

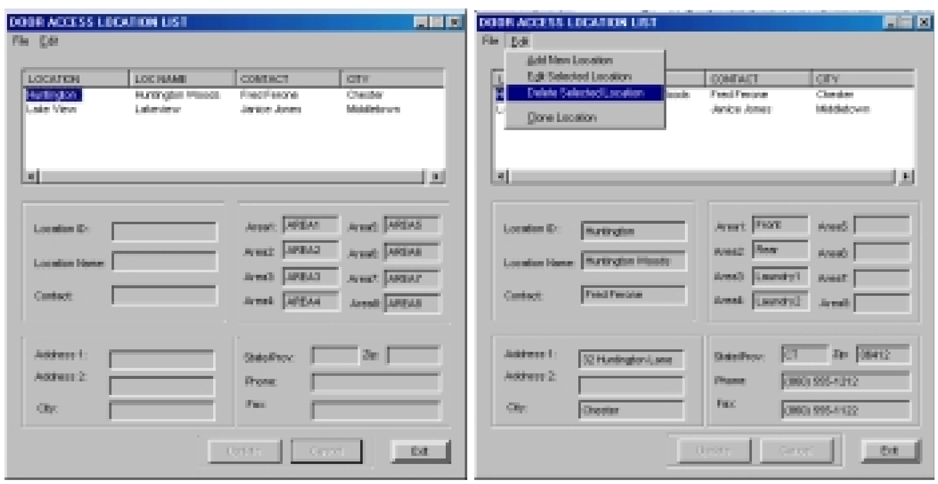

Figure 11.17 Deleting a Location

11.1.5.6. Cloning a Location

The cloning feature has been included with SMS2 as a timesaving feature for adding multiple Locations with similar information.

When cloning, a new Location is created with all the information being identical except for the Location ID.

To clone a Location, follow theses steps:

1. In the Door Access Location List window click the location to clone from the Locations List Window (Figure 11.18).
2. Select Clone Location from the Edit drop-down menu (Figure 11.18).

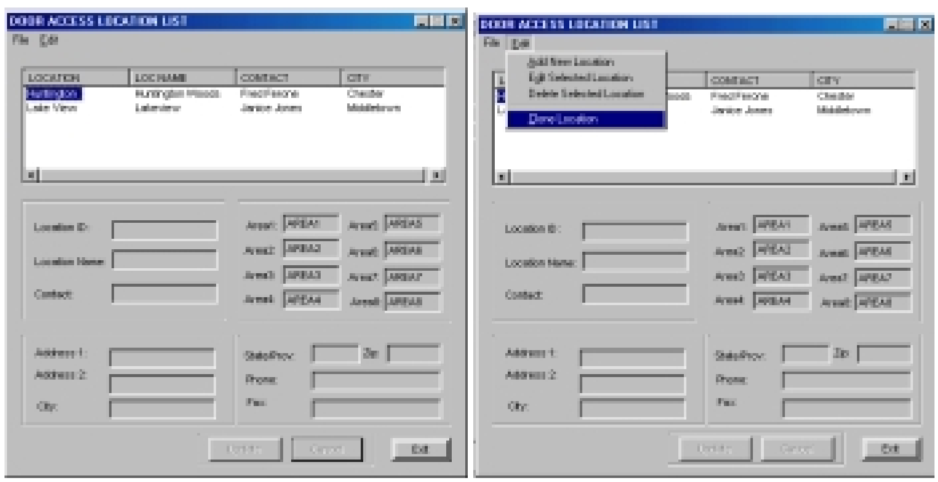

Figure 11.18 Cloning a Location

3. Enter a new Location ID and make any other changes.
4. Click the Update button to save the new Location (Figure 11.19).

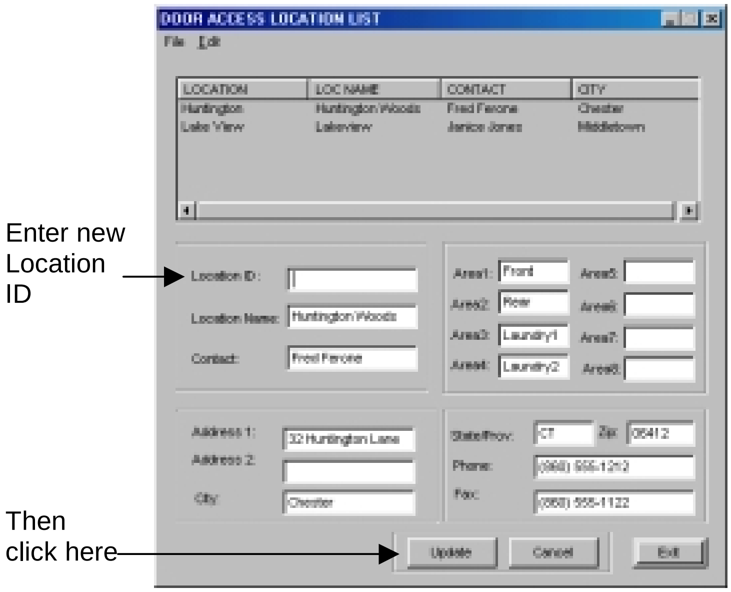

Figure 11.19 Completing the Cloning Process

11.1.6. Working with User Profiles

In this part of the database, specific user information is entered into the software. In addition to the user's personal information their access privileges and restrictions are determined in the Door Access User Profile window.

11.1.6.1. Restricting Access in the User Profile

The User Profile includes numerous ways to restrict access to individual users:

Active Access – When using the Advanced System this option must be enabled for a user to have <u>any</u> access privileges. This option can also be used to temporarily suspend a user's access privileges.

> **Note:**
>
> When making any changes to a user's restrictions each Door Access Reader that will be affected by this change must be reprogrammed with a Reader User List Card (Section 11.1.9).

Master Card – When this option is enabled, the user will have access to all Door Access Readers in all the locations programmed by SMS2.

Location ID - Whether using the Basic System or Advanced System in setting up your Door Access System, Locations are the primary criteria for restricting users' access. Unless the Master Card option is enabled, a user will only be able to access doors programmed with the same Location ID as their own profile.

Areas – When using the Advanced System a reader is set up with a specific area (areas are defined in the Door Access Locations List). When entering a user into the system, select which of the eight available Areas in each Location a user will be allowed access.

Valid Through – In these two fields enter a start and end date for a period during which the user's card will be valid. This allows for an expiration date on a Door Access or User Card.

No Time Restriction – The Greenwald Intellicard Door Access System allows for restricting access to individual readers according to the time of day and day of week. By selecting this option the user’s access will not be affected by these time restrictions.

11.1.6.2. Opening the Door Access User Profile Window

To Open the Door Access User Profile window click the Add/Edit User Profile in the Door Access Manager (Figure 11.20)

Door Access Manager

Click here

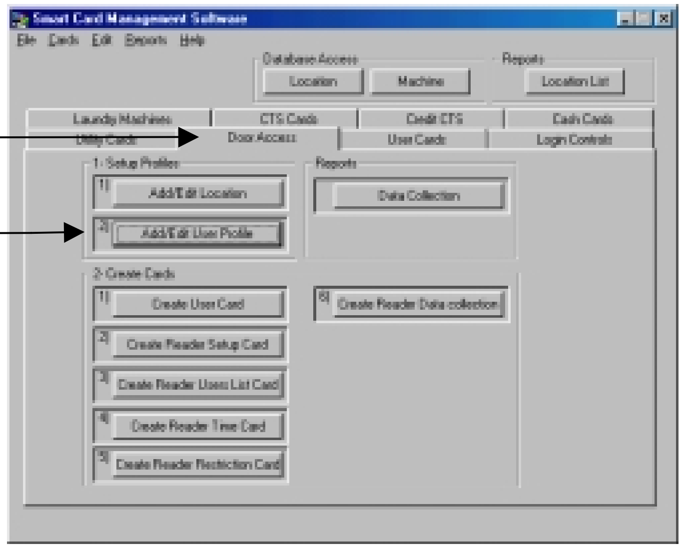

Figure 11.20 Opening the Door Access User Profile Window

11.1.6.3. The Door Access User Profile Window Interface

The Door Access User Profile window consists of three basic components (Figure 11.21):

1. The **User Profile List Window** lists all of the Users entered into the software (this includes those users entered in the User Manager, Utility Cards Manager or the Login Controls Manager). The name, address and Location information are listed for easy identification and sorting.
2. The main body of the window contains the **User Information**.
3. **Command Buttons** for the most commonly used features have been included for ease of use.

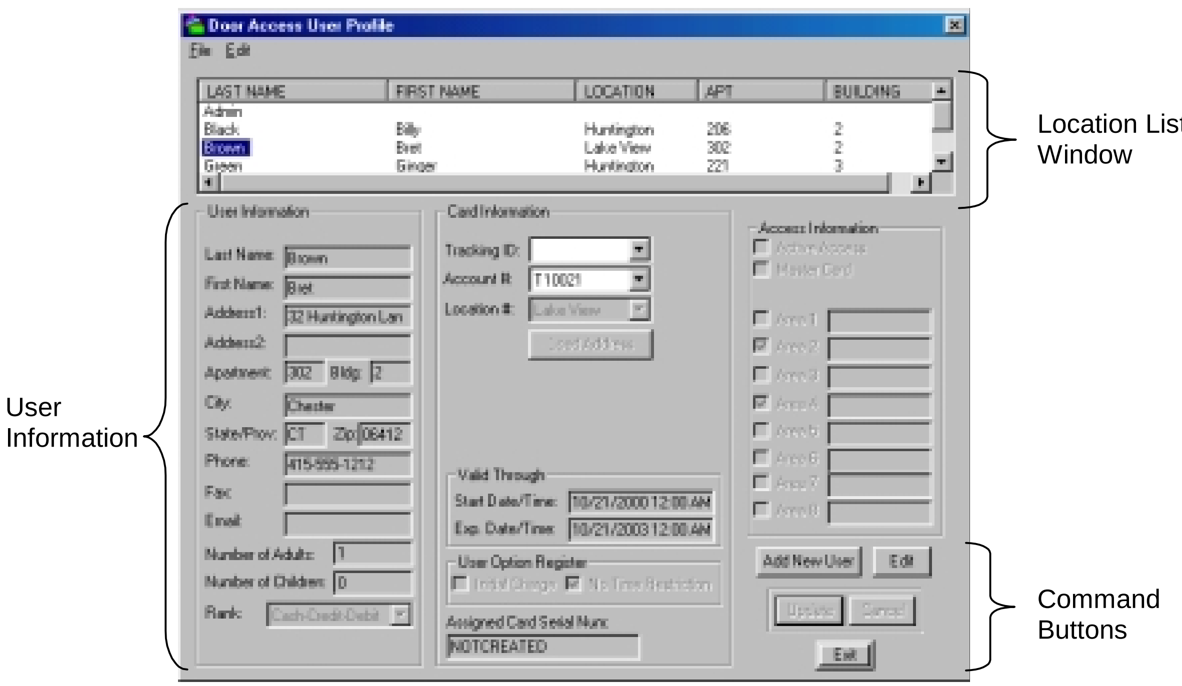

Figure 11.21 The Door Access User Profile Window Interface

Table 11.2 describes each field in the Door Access User Profile window and identifies field restrictions:

Table 11.2 User Manager Fields

Field Name	Description	Restrictions
Last Name	Last name of user	Up to 32 characters
First Name	First name of user	Up to 32 characters
Address 1	Address of user	Up to 32 characters
Address2	Address of user	Up to 32 characters
Apartment	Apartment number of user	Up to 16 characters
Building	Building number of user	Up to 16 characters
City	City of user	Up to 32 characters
State/Prov	State or Province of user	Up to 16 characters
Zip	Postal code of user	Up to 16 characters
Phone	Phone number for user	Up to 16 characters
Fax	Fax number for user	Up to 16 characters
Email	Email address of user	Up to 30 characters
Number of Adults	Number of adults living in apartment	No restrictions
Number of Children	Number of children living in apartment	No restrictions
Rank	The order of payment types this customer prefers to use to reconcile his or her account (Example: Cash then Credit Card then Debit Card).	Drop down selection
Tracking ID	A feature of the User Card Manager, selecting a Tracking ID that corresponds to a card will save time in issuing cards (See User Card Manager, Chapter 6)	Drop down selection
Account #	Assigns a unique identity to the user	Required alphanumeric field up to 10 characters in length
Location ID	Assigns user to a location existing in the Locations Manager	Required field, Drop down selection
Valid Through	Defines the time period the card will be valid.	Two time/date fields. Format: MO/DY/YEAR HR: MN.

continued on next page

Table 11.2 continued

Initial Charge	Enabling this option will prompt the Cash Card Transaction Machine to charge the user an initial fee typically to offset the cost of the card (Section 9.2).	Check Box
No Time Restriction	Gives the user the ability to use Door Access Readers even during predefined restricted times (see section 11.1.11)	Check Box
Assigned Card Serial #	Displays card serial number once a card has been assigned to the user	Software defined
Active Access	This option enables in a user to have access to specified Locations and Areas.	Check Box
Master Card	Enabling this option allows user access to all Door Access Readers programmed by your SMS2 package.	Check Box
Area 1 – **Area 8**	Selects which Areas (Predefined in the Door Access Location List window section 11.1.5) the user will be granted access to.	Check boxes

11.1.6.4. Adding a User

1. In the Door Access User Profile window click the Add New User button or select Add New User from the Edit drop-down menu (Figure 11.22).
2. Enter the information for the User (Table 11.2).

Tech Tip

When entering users in their respective locations, click the Load Address button to automatically load the address information for that location.

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3. After verifying that all user information and access privileges have been entered correctly, click the Update button (Figure 11.22).

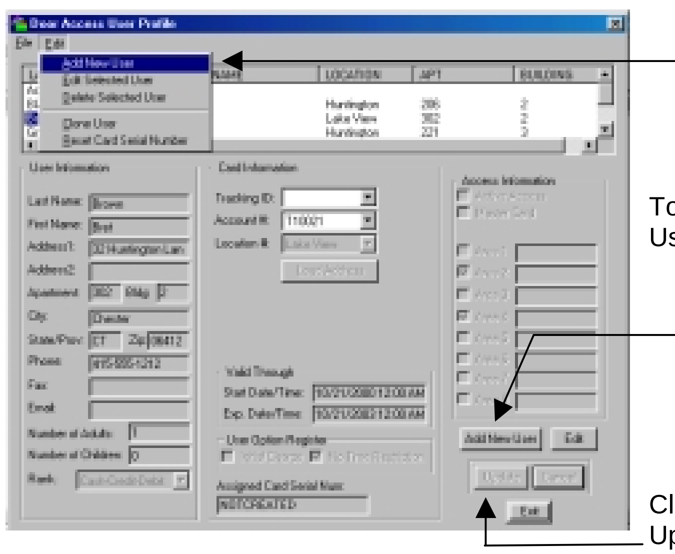

Figure 11.22 Adding a User

11.1.6.5. Editing a User

1. In the Door Access User Profile window click the user to edit from the Users List Window (Figure 11.23).
2. Select Edit Selected User from the Edit drop-down menu.

Tech Tip

Steps 1 and 2 can be avoided by simply double clicking on the user to be edited from the Users List Window.

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3. Make any necessary changes.
4. Verify that the new information is accurate, and click the Update button to save changes.

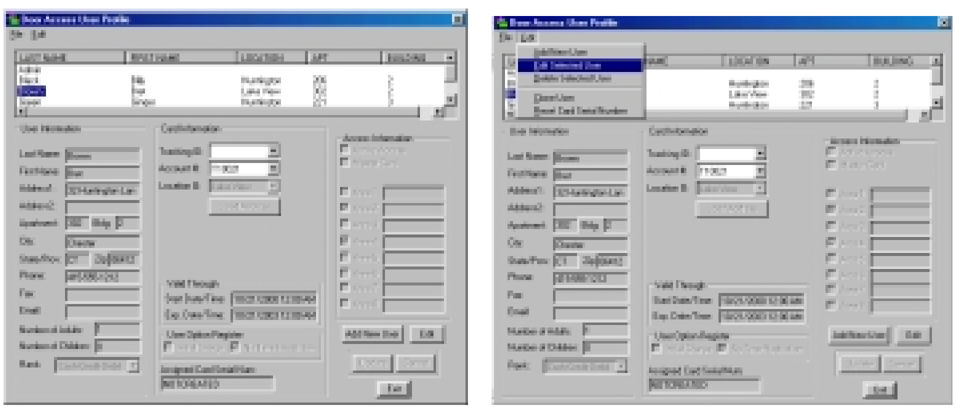

Figure 11.23 Editing a User

11.1.6.6. Deleting a User

Warning!

When deleting a User, the database retains the user information for report generation only. A deleted user cannot be recovered.

1. In the Door Access User Profile window click the User to delete from the Users List Window (Figure 11.24).
2. Select Delete Selected User from the Edit drop-down menu (Figure 11.24).
3. A window will appear to verify deletion of the selected user, click the Yes button to proceed with the deletion. Click the No button to cancel this operation.

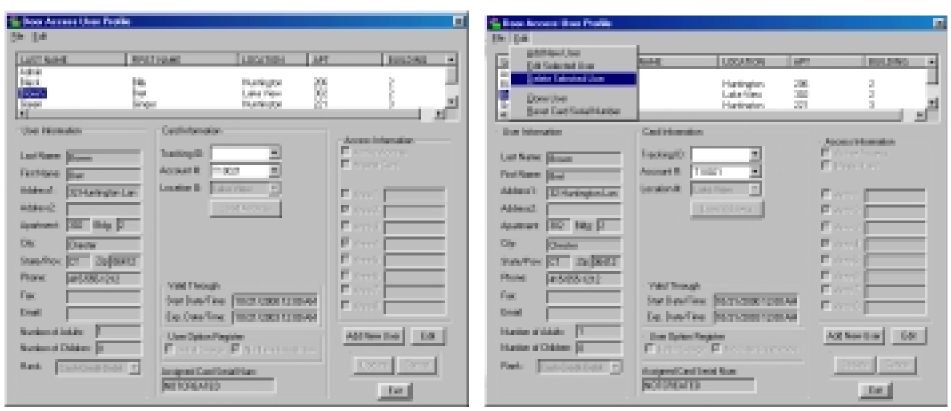

Figure 11.24 Deleting a User

11.1.6.7. Cloning a User

The cloning feature has been included with SMS2 as a time saving feature for adding multiple users with similar information, such as tenants from the same apartment but with separate accounts or access restrictions.

The cloning feature allows the system administrator to copy all the information for an existing user except for the Account Number, and name fields.

To clone a user, follow these steps:

1. In the Door Access User Profile window click the user to clone from the Users List Window (Figure 11.25).
2. Select Clone User from the Edit drop-down menu (Figure 11.25).
3. Enter the new user’s name and a new unique account number.
4. Make any additional changes to the new user’s record.
5. Click the Update button to save the information for the new user to the database.

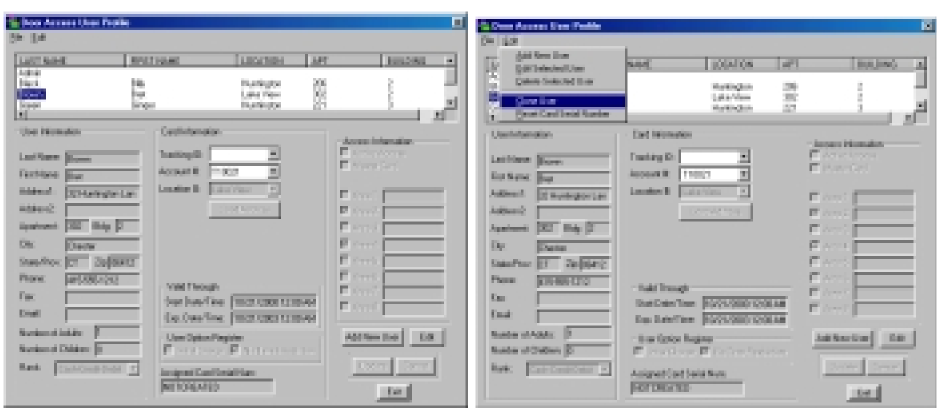

Figure 11.25 Cloning a User

11.1.6.8. Resetting a User Card Serial Number

Warning!

By resetting the serial number of a user, you will lose the link between the user and the card already created for that person.

If a new card needs to be issued to a user after one has already been issued, the card serial number that is tracked in the User Profile needs to be reset first.

To do so follow these steps:

1. In the Door Access User Profile Window select the user for whom the card serial number is to be reset (Figure 11.26).
2. Click the Edit button.
3. Select Reset Card Serial Number from the Edit drop-down menu (Figure 11.26).
4. A warning window will appear, click Yes to continue or No to cancel.
5. Click the Update button.

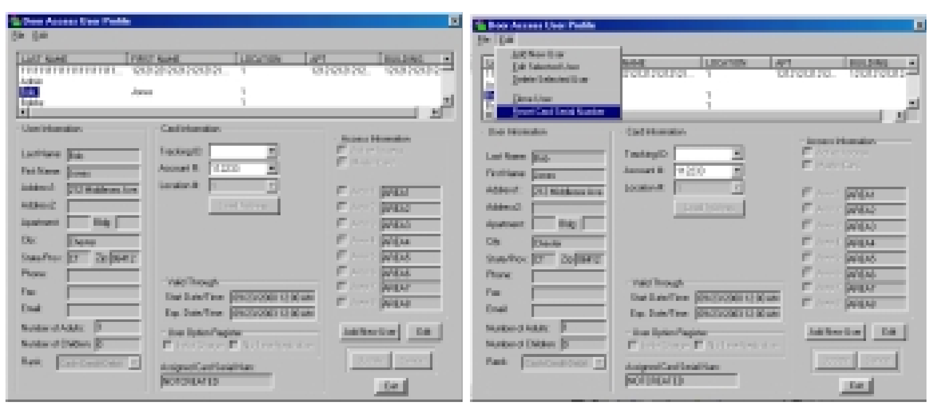

Figure 11.26 Resetting a User Card Serial Number

11.1.7. Creating User Cards

Once the database has been setup and the Door Access Readers have been programmed, User Cards can be created and issued to users.

User Cards can be issued either one at a time or to an entire building or location.

11.1.7.1. Creating a Single User Card

1. Click the Create User Card button in the Door Access Manager (Figure 11.27).

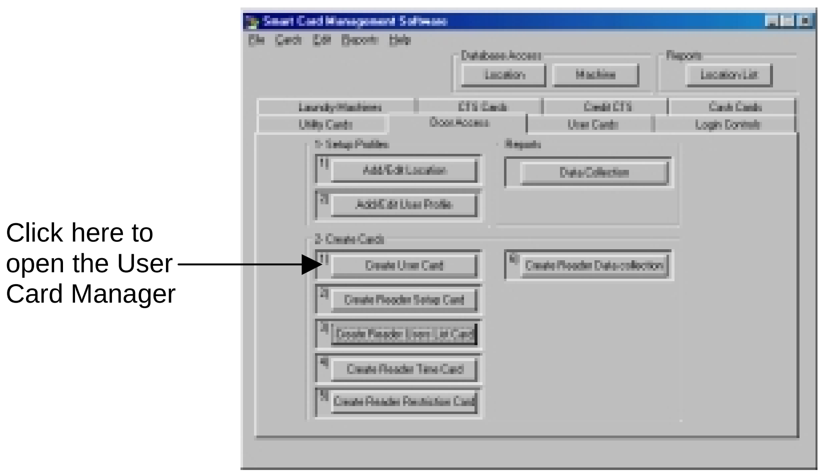

Figure 11.27 Opening the Door Access User Card Manager

2. Select the user’s location from the Card Location selection (Figure 11.28).
3. If this card is being created for a new user, select the “Load only new users for this location” sorting option to limit the number of users to be listed (Figure 11.28).
4. Select the User Account Number or name from the appropriate drop down selection (Figure 11.28).

Tech Tip

When managing a large number of users, first select the user’s building, apartment or telephone number to narrow the number of users that will appear in the Account Number or Name field.

---

5. Enable the “Create User Card” option by clicking on the appropriate box if the card will be used for laundry vending applications (Figure 11.28).
6. Insert the user card into the PC Reader (Section 2.4.2).
7. Click the Create Card button (Figure 11.28).

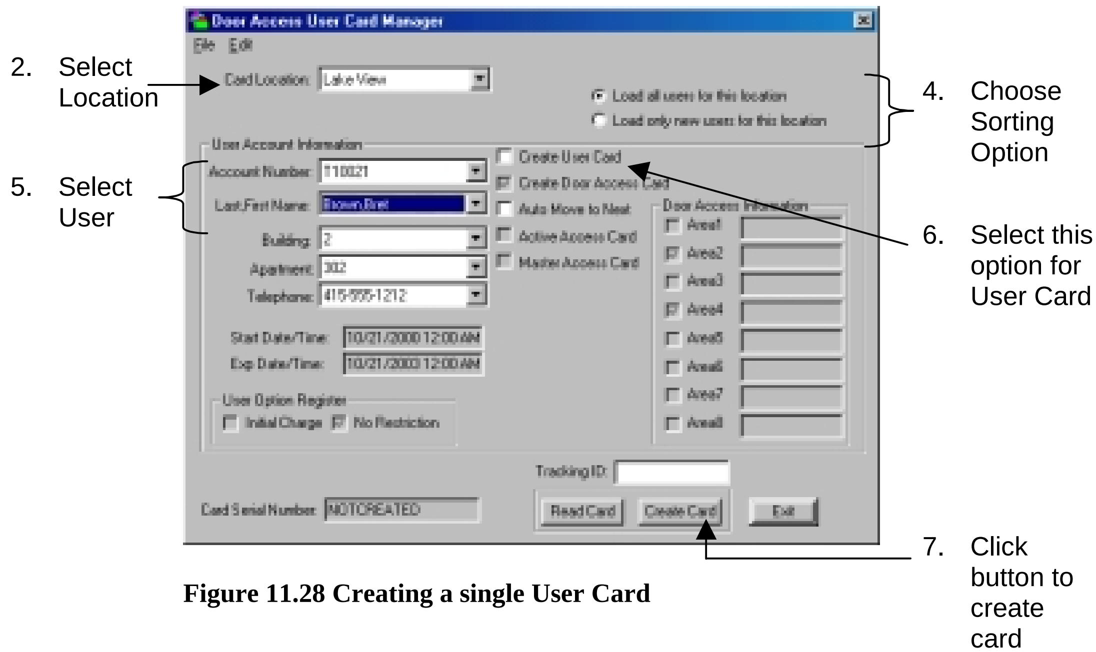

Figure 11.28 Creating a single User Card

8. A window showing the card creation progress will appear. When the window closes, the card has been created (Figure 11.29).

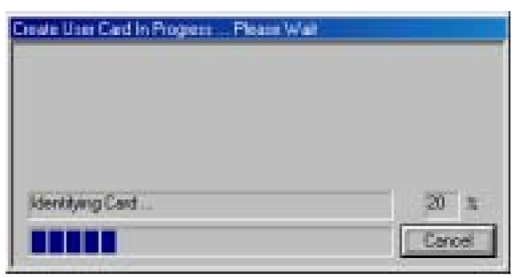

Figure 11.29 Card Creation Progress Window

11.1.7.2. Creating Multiple User Cards

SMS2 allows for creation of multiple user cards by location or specific buildings in a location. This option can be used to create cards for all users in a selected location/building or for new users only (those who have not had a user card issued to them).

To create multiple user cards, follow these steps:

1. Click the Create User Card button in the Door Access Manager (Figure 11.27).
2. Select the users' location from the User Location selection (Figure 11.30).
3. If cards are being created only for new users, select the "Load only new users for this location" option (Figure 11.30).
4. If cards are being created only for a specific building for this location, select the building from the Building drop-down selection (Figure 11.30).
5. Enable the "User Card" option by clicking on it if the cards are also going to be used for laundry vending applications (Figure 11.30).
6. Enable the "Auto Move to Next" option (Figure 11.30).
7. Insert a blank user card into the PC Reader (Section 2.4.2).
8. Click the Create Card button and repeat process (Figure 11.30).

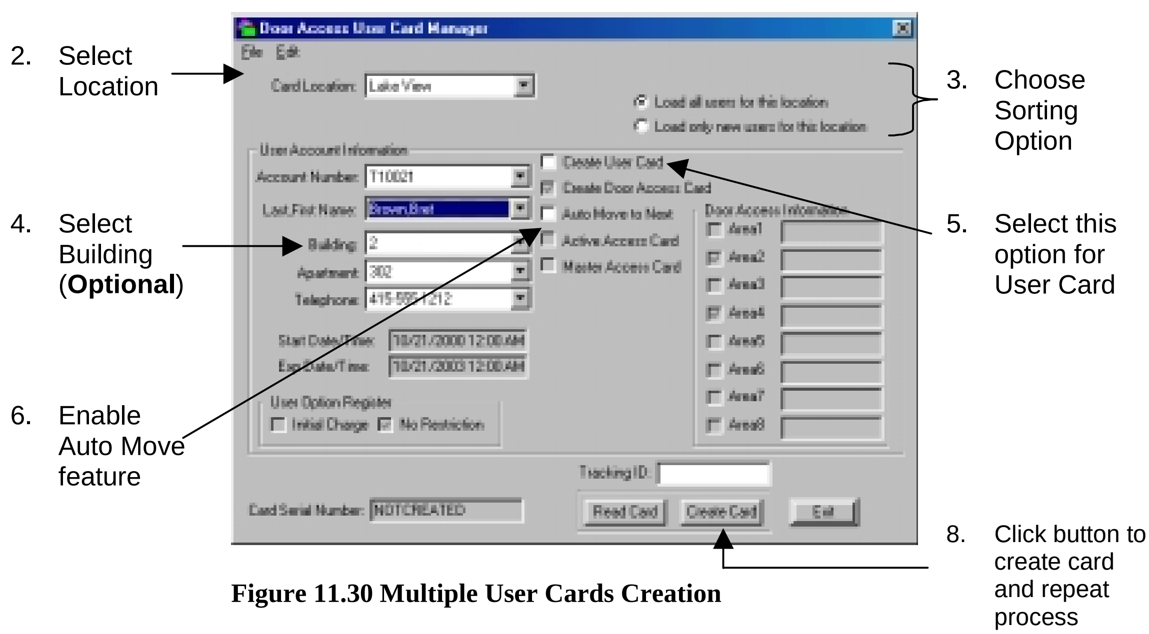

Figure 11.30 Multiple User Cards Creation

9. A window showing the card creation progress will appear. When it has closed, the card has been created (Figure 11.29).
10. The software will automatically move to the next user in that location/building. Insert a new card and click the Create Card button again and continue this process for creating the desired number of user cards.

11.1.8. Door Access Reader Setup Card

Door Access Reader Setup Cards are created from Profiles that are managed in the Reader Setup window. Once a profile is entered for a Door Access Reader, a setup card can be created to program it.

When using the Standard Door Access System, the reader can then be programmed with this card. When using the Advanced Door Access System, the User List (Section 11.1.9), Reader Time (Section 11.1.10) and Reader Restriction (Section 11.1.11) cards will be needed during the programming process.

11.1.8.1. Opening the Reader Setup Window

To open the Reader Setup window click the Create Reader Setup Card button in the Door Access Manager (Figure 11.31).

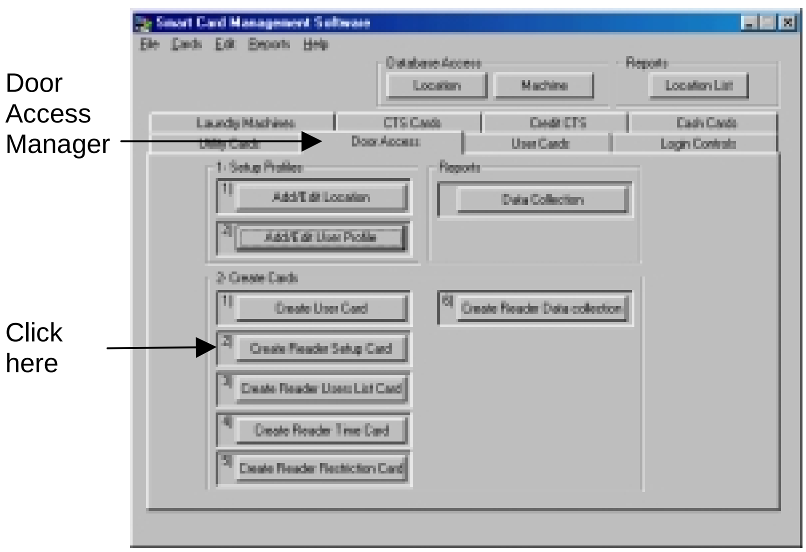

Figure 11.31 Opening the Reader Setup Window

11.1.8.2. The Reader Setup Window Interface

The Reader Setup window consists of three basic components (Figure 11.32):

1. The **Reader Setup Profile Window** lists all the Profiles entered into the software.
2. The **Reader Setup Information** of the window contains the reader setup information.
3. **Command Buttons** for the most commonly used features and Card Function buttons have been included for ease of use.

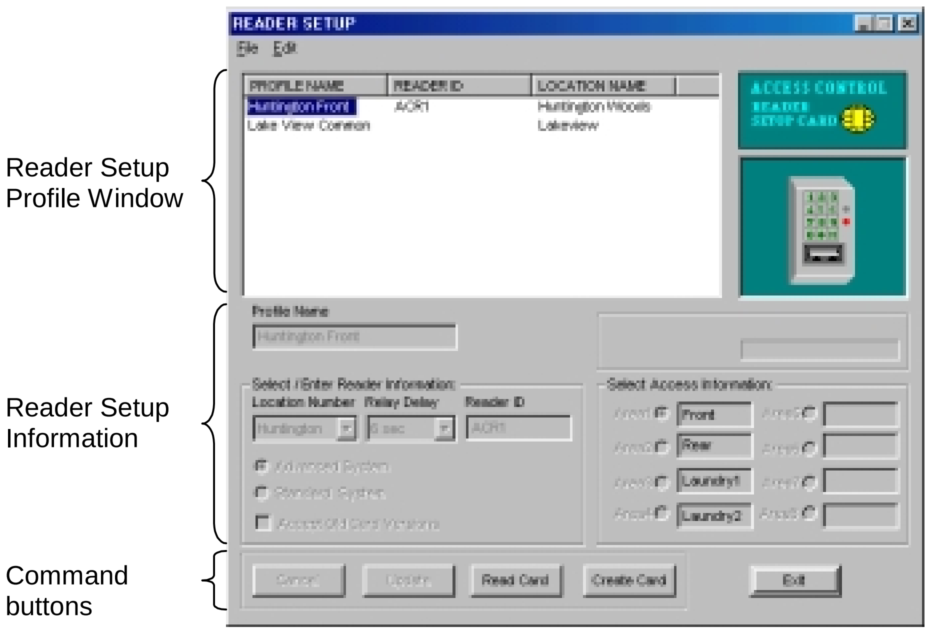

Figure 11.32 Reader Setup Window Interface

Table 11.3 describes each field in the Reader Setup window and identifies field restrictions.

Table 11.3 Reader Setup Window Fields

Field Name	Description	Restrictions
Profile Name	Required unique field assigning an identity to the profile.	Any alphanumeric combination up to 30 characters in length
Location Number	Associates one of the existing locations with the reader.	Drop Down Selection
Relay Delay	This determines how long the door will stay unlocked each time a valid card is accepted. The range is 0-9 seconds.	Drop Down Selection
Reader ID	Required unique field assigning an identity to the reader that will be programmed with the profile.	Any alphanumeric combination up to ten characters in length
Advanced or Standard System	Selecting one or the other of these options determines whether the Door Access Reader will operate in Standard or Advanced mode (see section 11.1.2).	Check Boxes
Accept Old Card Versions	If this option is enabled the Door Access Reader programmed from this version of software will accept cards from previous versions of SMS2 which **do not include an expiration date or time restriction override.** If this option is not enabled, the users' old cards will not work and new cards will have to be issued.	Check Box
Area 1 – Area 8	Associates one of the existing Areas in the selected Location with the reader.	Check Boxes

11.1.8.3. Adding a Reader Setup Profile

1. In the Reader Setup window select Add New Profile from the Edit drop-down menu (Figure 11.33).
2. Enter the data into the appropriate fields.
3. Verify that the data that was entered is accurate and click the Update button to save.

Click here

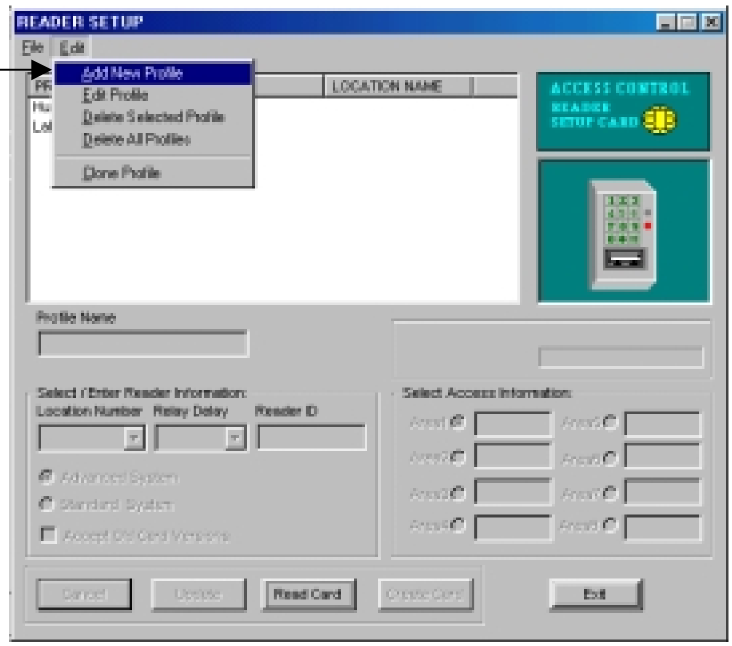

Figure 11.33 Adding a Reader Setup Profile

11.1.8.4. Editing a Reader Setup Profile

1. In the Reader Setup window select the profile to edit from the Profile List Window (Figure 11.34).
2. Select Edit Profile from the Edit drop-down menu (Figure 11.34).

Figure 11.34 Editing a Reader Setup Profile

Tech Tip

Steps 1 and 2 can be bypassed by double clicking on the profile to be edited from the Profile List Window.

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3. Enter the necessary changes.
4 Verify that the new information is accurate and click the Update button to save the changes (Figure 11.35).

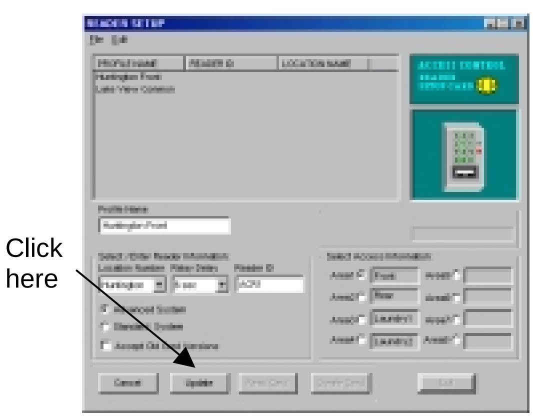

Figure 11.35 Saving the Reader Setup Profile Changes

11.1.8.5. Deleting a Single Reader Setup Profile

Warning!

A deleted reader setup profile cannot be recovered.

1. In the Reader Setup Profile window click the profile to delete from the Profile List Window (Figure 11.36).
2. Select Delete Selected Profile from the Edit drop-down menu (Figure 11.36).
3. A Confirmation window will appear, click Yes to continue or No to cancel.

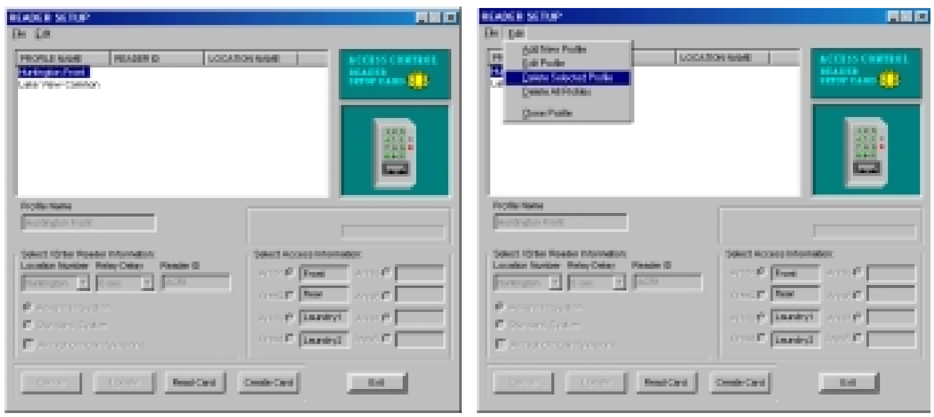

Figure 11.36 Deleting a Single Reader Setup Profile

11.1.8.6. Deleting All Existing Reader Setup Profiles

Warning!

Deleted reader setup profiles cannot be recovered

1. In the Reader Setup window select Delete All Profiles from the Edit drop-down menu (Figure 11.37).
2. A Confirmation window will appear, click Yes to continue or No to cancel.

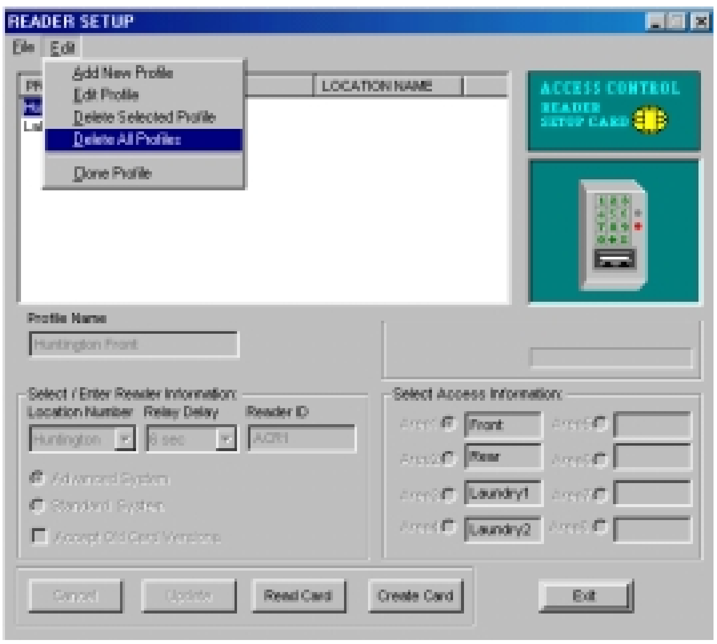

Figure 11.37 Deleting All the Reader Setup Profiles

11.1.8.7. To Clone a Reader Setup Profile

The cloning feature has been included with SMS2 as a time saving feature for adding multiple Locations with similar information.

When cloning, a new Reader Setup Profile is created with all the information being identical except for Profile Name and Reader ID.

To clone a Reader Setup Profile, follow these steps:

1. In the Reader Setup window click the profile to clone from the Profile List Window (Figure 11.38).
2. Select Clone Selected Profile from the Edit drop-down menu (Figure 11.38).

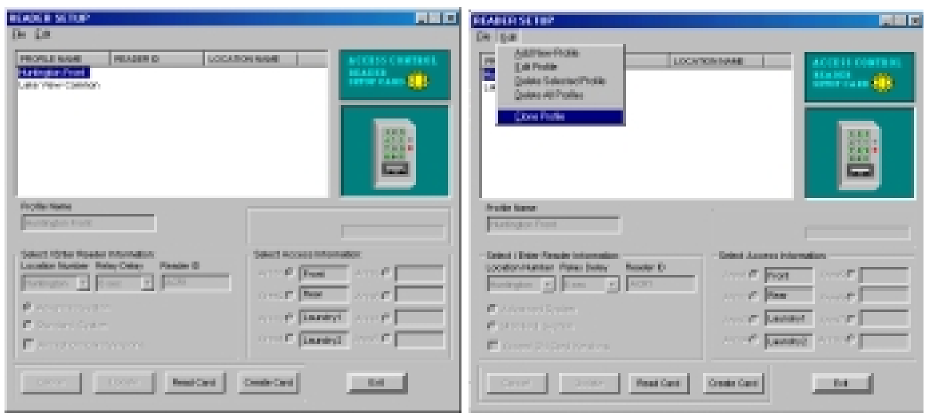

Figure 11.38 Cloning a Reader Setup Profile

1. Enter a new Profile Name and Reader ID and make any changes.
3. Click the Update button to save the new Reader Setup Profile (Figure 11.39).

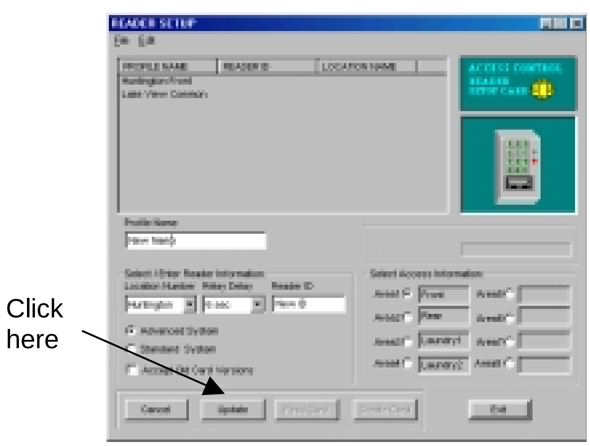

Figure 11.39 Completing the Cloning Process

11.1.8.8. Creating a Reader Setup Card

Once a profile has been entered for a reader, follow theses steps to create a setup card for it:

1. Insert a management card into the PC Card Reader (See section 2.4.1 and 2.4.2).
2. In the Reader Setup window select the profile from the Profile List Window to be used for the setup card (Figure 11.40).
3. Click the Create Card button (Figure 11.40).

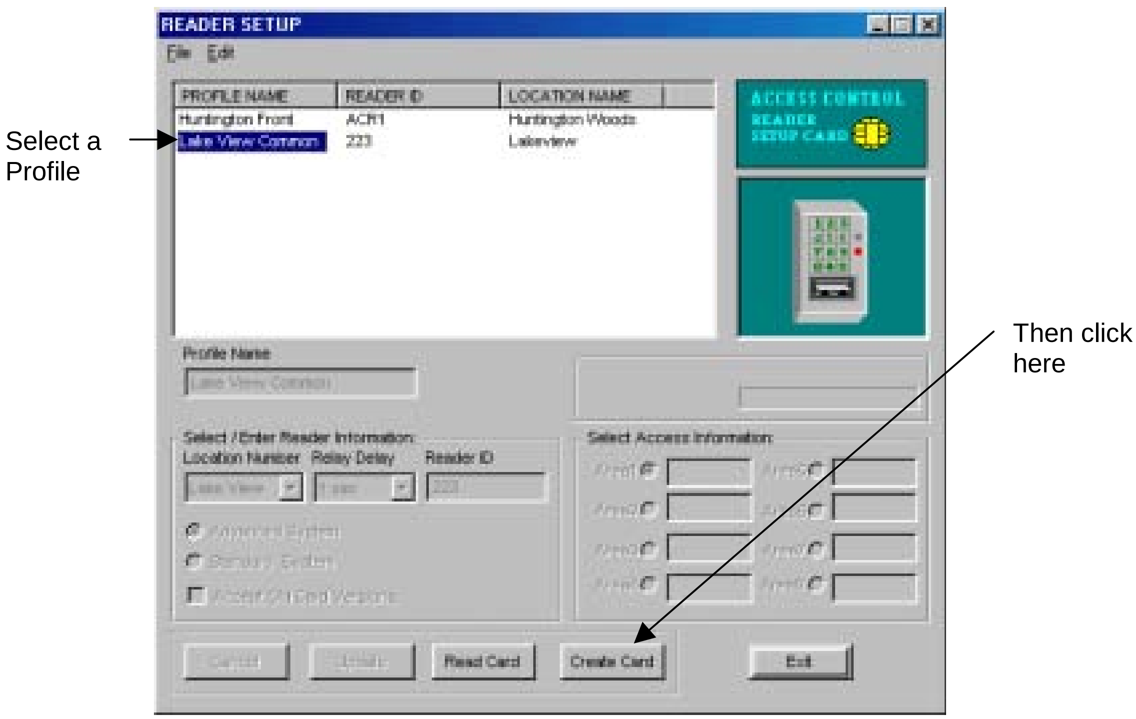

Figure 11.40 Creating a Door Access Reader Setup Card

11.1.8.9. Reading an Existing Door Access Setup Card

1. Insert the Door Access Setup Card into the PC Reader (See Section 2.4.2).
2. In the Reader Setup window click the Read Card button (Figure 11.41).
3. The card information will be displayed in the main body of the window (Figure 11.41).

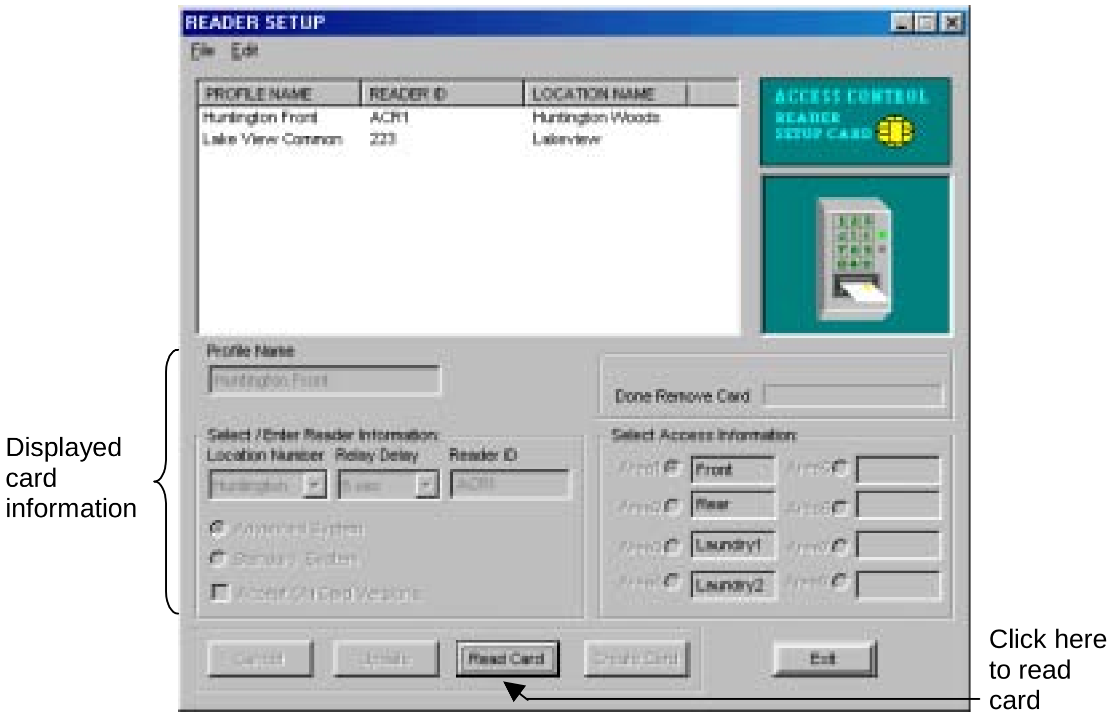

Figure 11.41 Reading an Existing Reader Setup Card

11.1.9. Reader User List Card

The Reader User List Card transfers the list of users with their access status to a particular Door Access Reader. This card must be used during the initial setup of a Door Access Reader and any time changes are made to the database that will affect a reader.

To create a User List Card:

1. In the Door Access Manager click the Create Reader User List Card button (Figure 11.42).

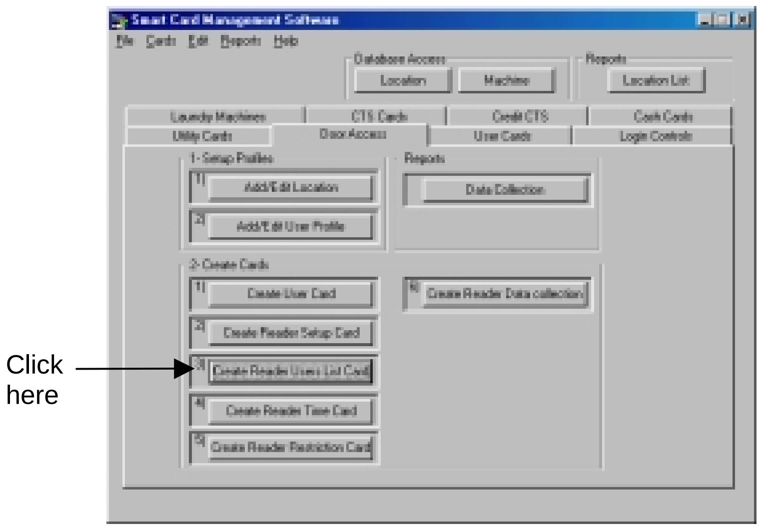

Figure 11.42 To Create a Reader User List Card

2. Select the Location of the reader from the Location drop-down menu (Figure 11.43).
3. Select the reader's Area (Figure 11.43).
4. Insert a 8k Management Card into the PC Card Reader (Section 2.4.2).

5. Click the Create User List Card button (Figure 11.43).

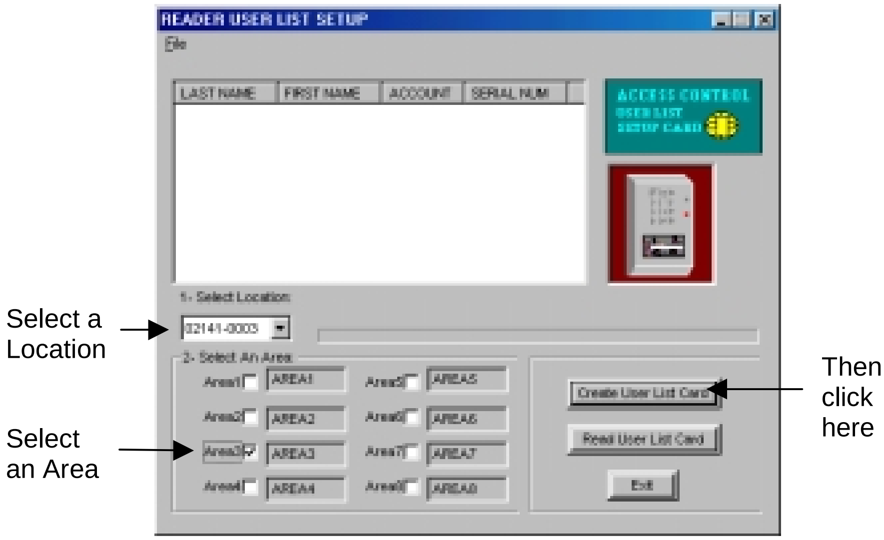

Figure 11.43 Creating a Reader User List Setup Card

Note:
Users who will be allowed entry will be displayed in the window as the card is being created.

11.1.10. Reader Time Cards

In the Advanced Door Access System the Door Access Readers must be set with the correct time in order for reporting capabilities and time restriction to function correctly.

11.1.10.1. Creating a Time Card

1. Click the Create Reader Time Card button in the Door Access Manager (Figure 11.44).

Click here

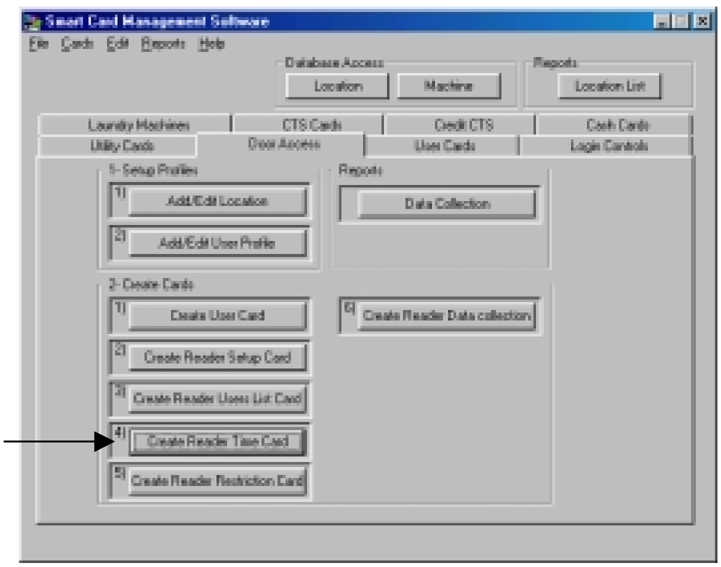

Figure 11.44 Creating a Time Card

2. If this card is to be issued with only a limited number of uses, check the “Check Uses Remaining” option and enter the number of times this card can be used (Figure 11.45).
3. Enable the “Create Card with Current Date/Time” option to create the Time Card with your PC’s Date and Time, or disable this option and enter desired date and time manually (Figure 11.45).

Note:
Disabling this option allows the creation of time cards to be used at a later time.

4. Insert a Smart Card into the PC Reader (Section 2.4.2)

5. Click the Create Time Card button (Figure 11.45).

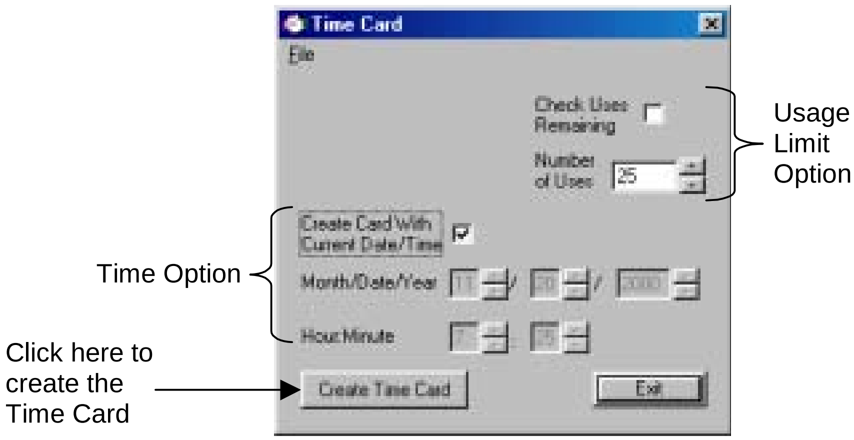

Figure 11.45 Creating the Time Card

11.1.11. Reader Restriction Cards

The Door Access Manager has the ability to restrict access to specific Door Access Readers according to the day of week and time of day.

Note:

Time restrictions do not apply to users set up with either the “No Time Restriction” or the “Master Card” options enabled (section 11.1.7). Additionally, time restrictions cannot be used in the Standard Door Access System.

Time restrictions are organized into Profiles that can contain up to twenty-three restrictions. Each restriction determines the time of day and which days the access will be restricted to a particular Door Access Reader. For example a particular profile can restrict access to an entry point between 5PM and 10PM Monday through Friday and restrict access for the entire day on Saturday and Sunday.

To set up time restrictions in a Door Access Reader:

1. Add a Time Restriction Profile.
2. Create up to twenty-three restrictions for that profile.
3. Create a Reader Restriction Card for programming the Door Access reader.
4. A “Clear Card” can be created to remove time restrictions from the Door Access Reader

11.1.11.1. Opening the Door Access Restriction Time Window

To Open the Door Access Restriction Time Window, click the Create Reader Restriction Card button in the Door Access Manager (Figure 11.46).

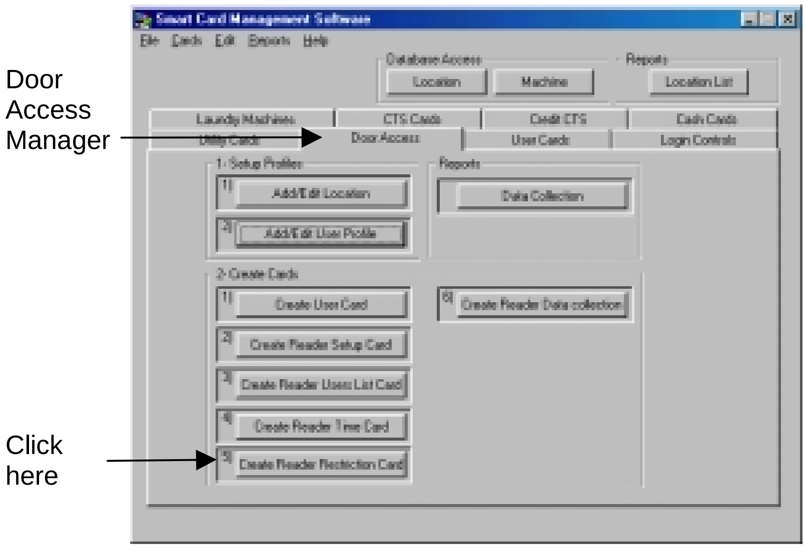

Figure 11.46 Opening the Door Access Restriction Time Window

11.1.11.2. The Door Access Restriction Time Window Interface

The Door Access Restriction Time window consists of four basic components (Figure 11.47):

1. The **Profile List Window** lists all the profiles entered into the software.
2. The **Restriction List Window** lists all the restrictions of a selected profile.
3. The **Restriction Information** section contains the day and time specifications of the selected restriction.
4. **Command and Function Buttons** for the most commonly used features have been included for ease of use.

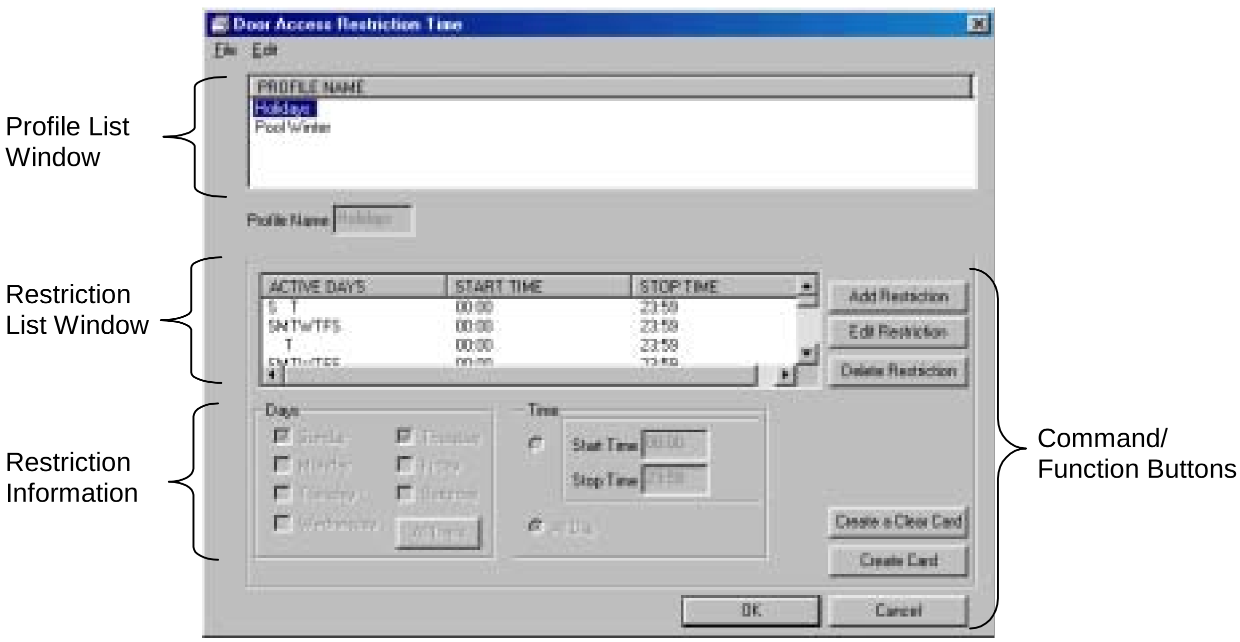

Figure 11.47 The Door Access Restriction Time Window

Table 11.4 describes each field in the Door Access Restriction Time window and identifies its restrictions.

Table 11.4 Reader Setup Window Fields

Field Name	Description	Restrictions
Profile Name	Required unique field assigning an identity to the profile.	Any alphanumeric combination up to 30 characters in length
Days	Selects which day or days of the week the restriction will apply to.	Check Boxes for each day of the week
All Days	This time saving feature selects all the days of the when clicking this button.	Button
Start Time /Stop Tim	Select this option when defining a limited time period for the restriction to be active. The starting and ending times entered will apply to the day(s) selected. Note: Time restrictions cannot cross the 23:59 to 00:00 time change (see note in Section 11.1.11.6)	Check Box to select Option. Time fields formatted to "Military Time." HH:MM
All Day	If selecting this option access restrictions will apply to the entire day or days selected.	Check Box

11.1.11.3. Adding a Reader Restriction Profile

1. In the Door Access Restriction Time window select Add Profile from the Edit drop-down menu (Figure 11.48).
2. Enter an identification in the Profile Name field (Figure 11.48).
3. Click the Update button to save the new profile (Figure 11.48).

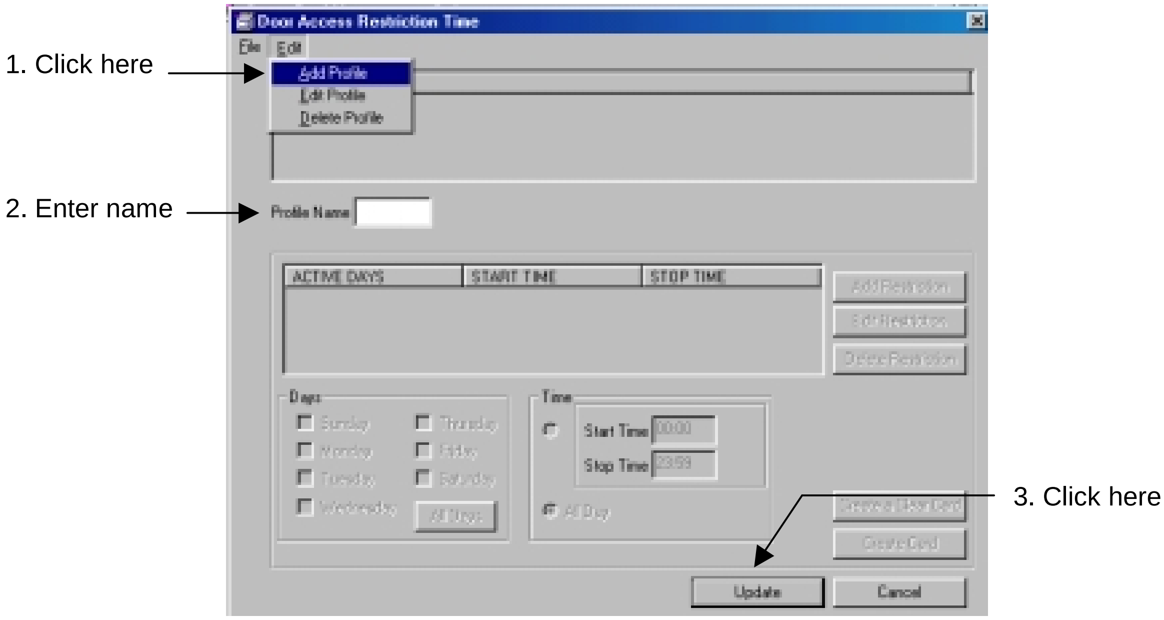

Figure 11.48 Adding a Door Access Restriction Time Profile

11.1.11.4. Editing a Reader Restriction Profile Name

1. In the Door Access Restriction Time window select a profile to edit from the Profile List Window.
2. Select Edit Profile from the Edit drop-down menu (Figure 11.49).
3. Edit the Profile Name field (Figure 11.49).
4. Click the Update button to save changes to the profile (Figure 11.49).

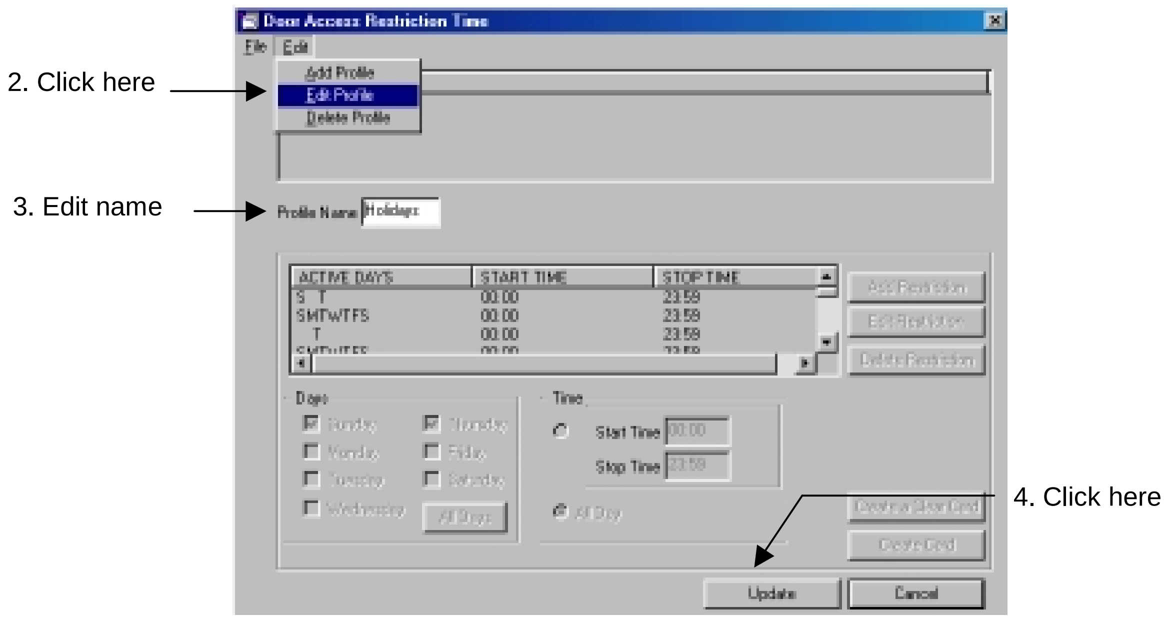

Figure 11.49 Editing a Door Access Restriction Time Profile

11.1.11.5. Deleting a Door Access Restriction Time Profile

Warning!

A deleted Door Access Restriction Profile and all Restrictions assigned to it cannot be recovered.

1. In the Door Access Restriction Time window select a profile to delete from the Profile List Window (Figure 11.50).
2. Select Delete Profile from the Edit drop-down menu (Figure 11.50).

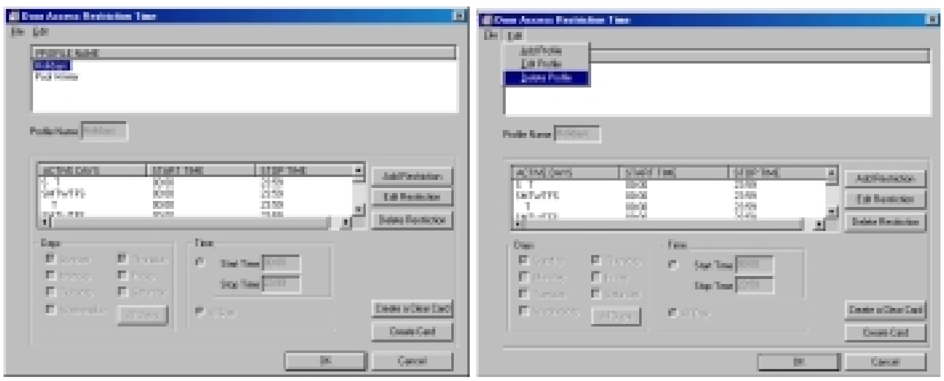

Figure 11.50 Deleting a Door Access Restriction Time Profile

11.1.11.6. Adding a Restriction

Note:
A single time restriction cannot cross the 23:59 to 00:00 time change. For example to create a time restriction from 5PM to 9AM two separate restrictions need to be created, one from 17:00 to 23:59 and one from 00:00 to 9:00.

1. In the Door Access Restriction Time window select a profile to add the restriction to (Figure 11.51).
2. Click the Add Restriction button (Figure 11.51).

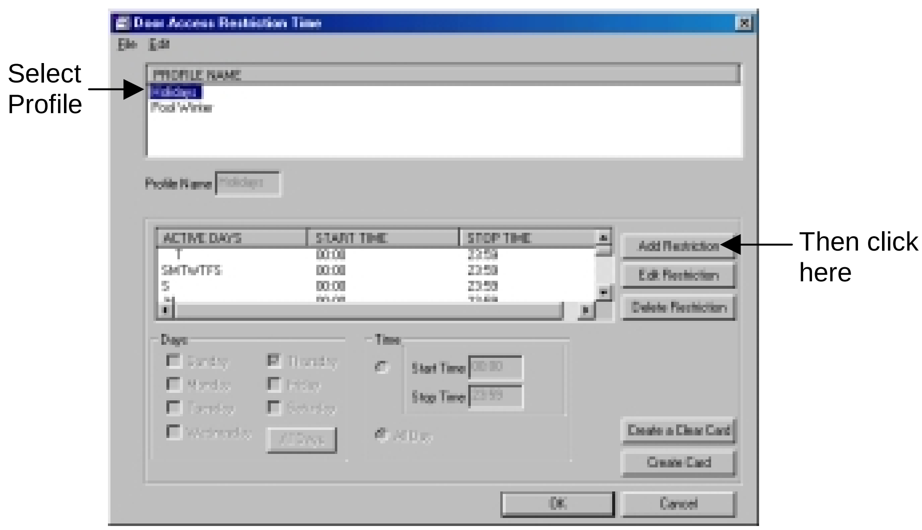

Figure 11.51 Adding a Restriction

3. Enter the restriction days and time as defined in Table 11.3 (Figure 11.52).

4. Click the Update button to save the new restriction (Figure 11.52).

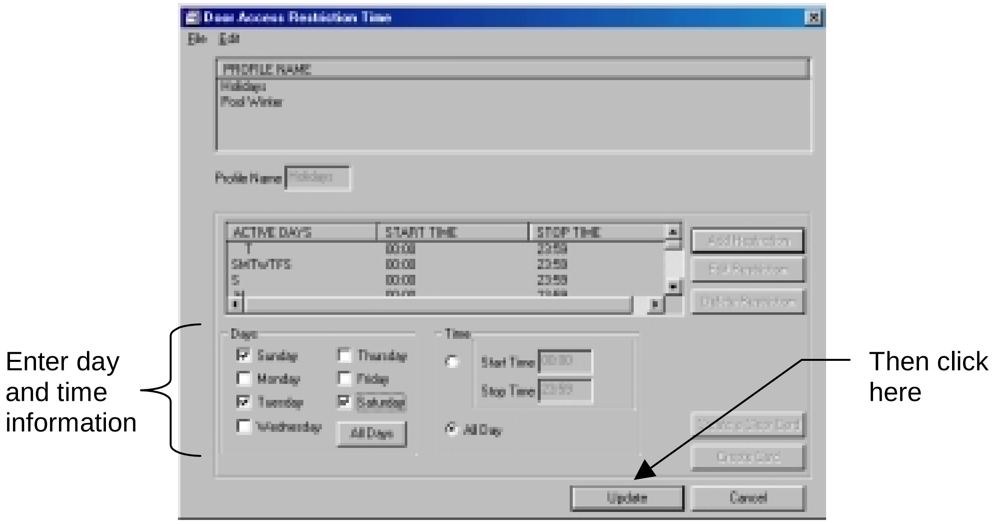

Figure 11.52 Selecting Restriction Parameters

11.1.11.7. Editing a Restriction

1. In the Door Access Restriction Time window select a profile and the restriction to edit (Figure 11.53).
2. Click the Edit Restriction button (Figure 11.53).

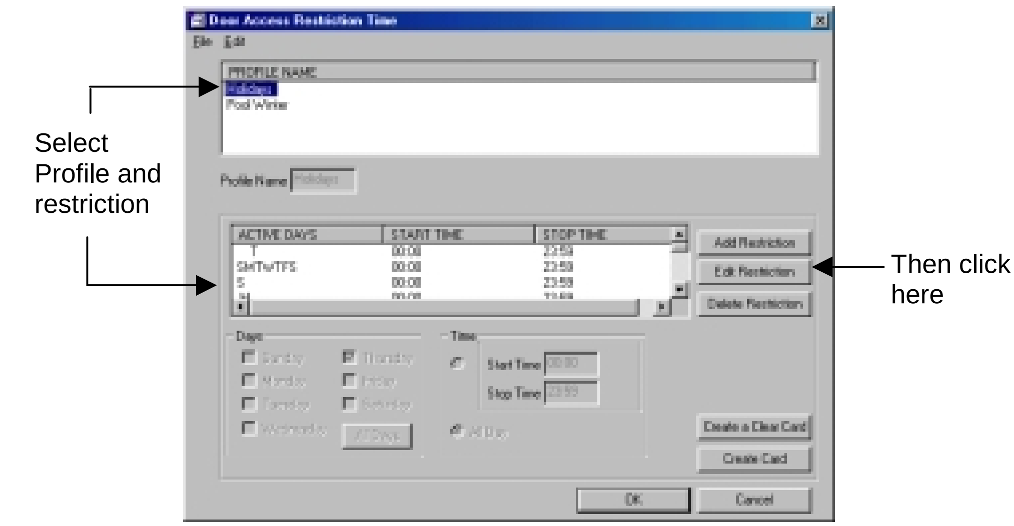

Figure 11.53 Editing a Restriction

3. Edit the restriction days and time as defined in Table 11.4 (Figure 11.54).
4. Click the Update button to save the new changes (Figure 11.54).

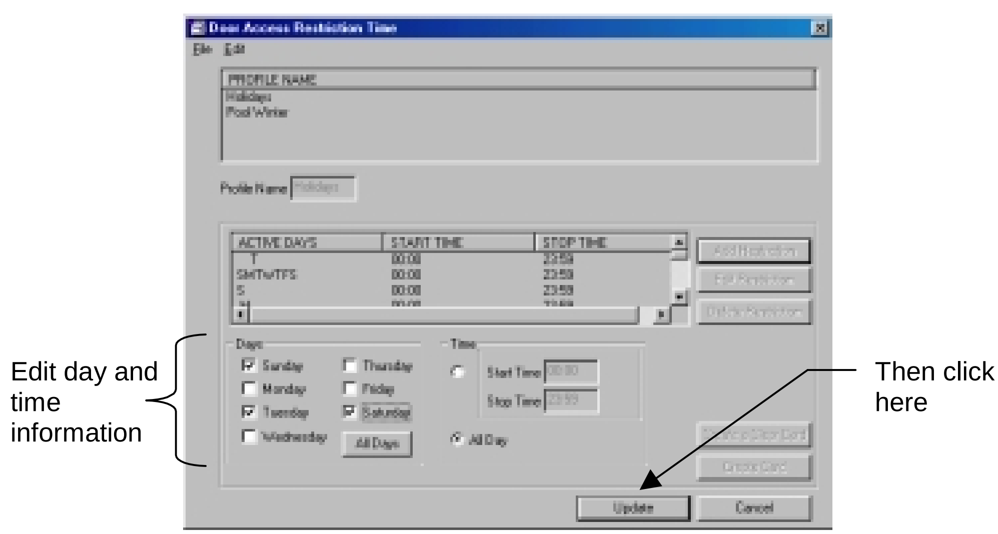

Figure 11.54 Editing a Restriction

11.1.11.8. Deleting a Restriction

Warning!

A deleted Door Access Restriction cannot be recovered.

1. In the Door Access Restriction Time window select a profile and the restriction to delete (Figure 11.55).
2. Click the Delete Restriction button (Figure 11.55).

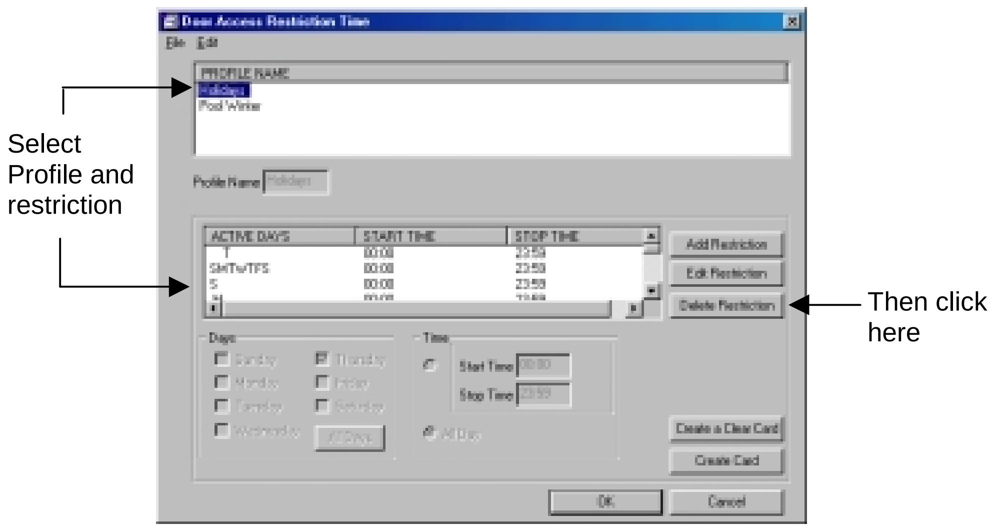

Figure 11.55 Deleting a Restriction

11.1.11.9. Creating a Reader Restriction Time Card

Once the profiles and restrictions have been entered, Reader Restriction Time Cards are created to program the Door Access Readers with the profile information.

To Create a Reader Restriction Card:

1. Insert a Management Card into the PC Card Reader (Sections 2.4.1 and 2.4.2).
2. In the Door Access Restriction Time Window select a profile to use (Figure 11.56).
3. Click the Create Card Button (Figure 11.56).

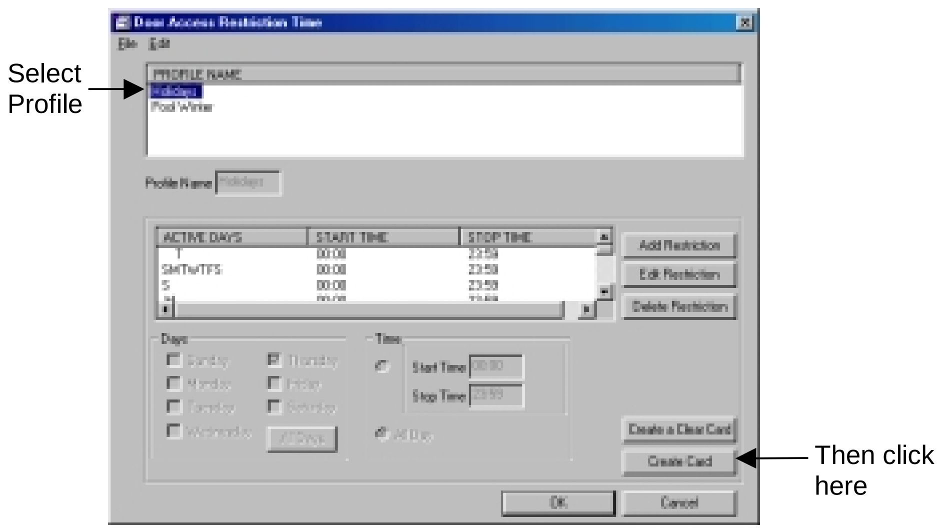

Figure 11.56 Creating a Reader Restriction Time Card

11.1.11.10. Creating a Reader Restriction Time "Clear Card"

Once a Door Access Reader has been programmed with time restrictions, a Clear Card can be used to remove those restrictions from the reader.

To Create a Reader Restriction Time Clear Card:

1. Insert a Management Card into the PC Card Reader (Sections 2.4.1 and 2.4.2).
2. In the Door Access Restriction Time Window click the Create Clear Card button (Figure 11.57).

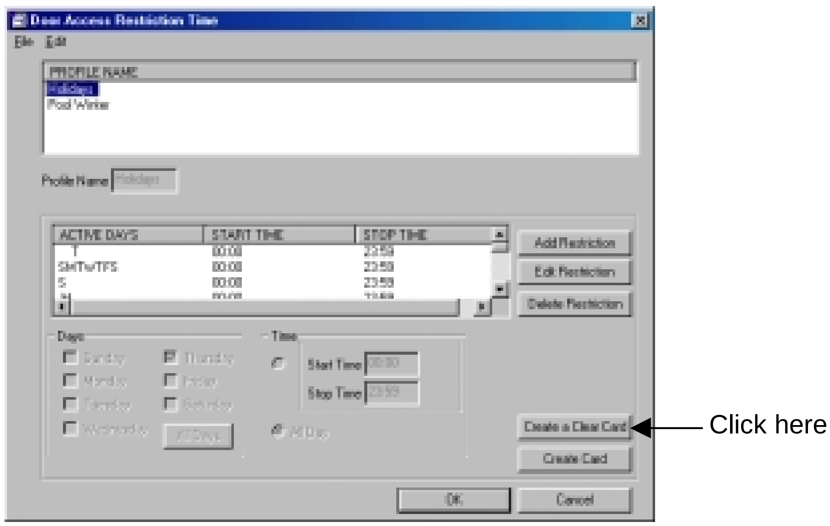

Figure 11.57 Creating a Reader Restriction Time Clear Card

11.2. Collecting Data

When a User Card is used to gain access through a Door Access Reader in the Advanced System, an entry record is kept in the machine's memory. To retrieve transaction records and view them, follow these three steps.

1. Create a Reader Data Collection Card.
2. Collect data from the Door Access Reader.
3. Read the Data Card (transfer the record into the software).

These steps are discussed in further detail in Section 11.2.1. Once these steps are completed, reports of user transactions can be viewed or printed (Section 11.3).

11.2.1. Creating a Data Collection Card

1. Insert an 8K Management Smart Card into the PC Reader (Section 2.4.2).

Warning!

This process will delete any previous collections on the card. If this card has been used for data collections in the past, be sure to read the data card into the appropriate manager first.

2. Click the Create Reader Data Collection button in the Door Access Manager (Figure 11.58).

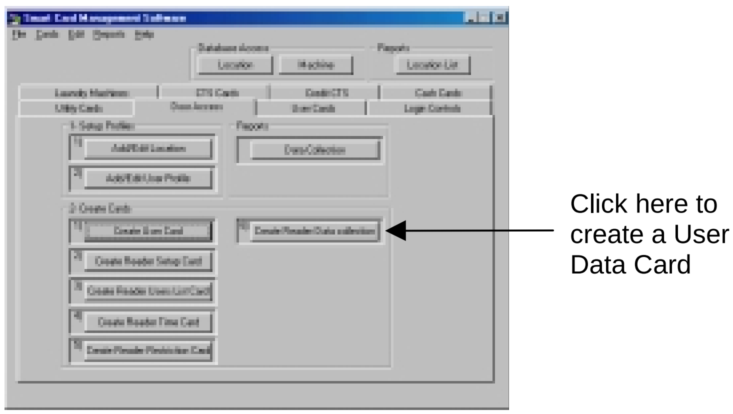

Figure 11.58 Creating a Reader Data Collection Card

3. In the Door Access Data Collection window click the Create/Clear Card button. (Figure 11.59).

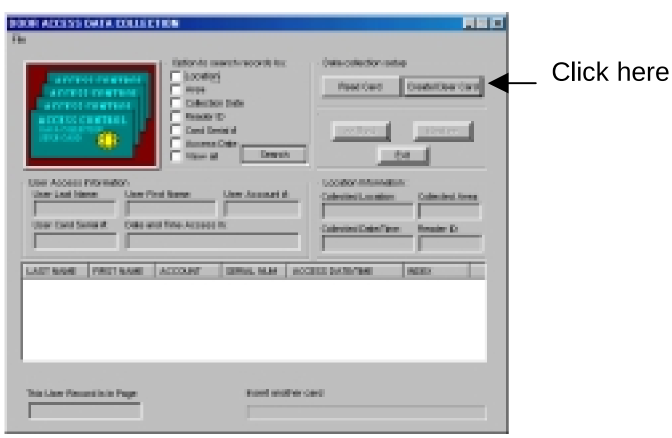

Figure 11.59 Creating the Data Collection Card

11.2.2. Collecting Data

To collect data, insert a Service Card into the Door Access Reader and then insert the Door Access Data Collection Card within one minute.

Note:

The memory capacity of a Door Access Data Collection card allows for only one Door Access Reader collection per card.

11.2.3. Reading the User Data Collection Card

Reading the Data Card transfers the records into the PC so that the data can be viewed or used for report generation.

1. Insert the Door Access Data Collection card into the PC Reader (Section 2.4.2)
2. Click the Create Reader Data Collection button in the Door Access Manager (Figure 11.58).
3. In the Door Access Data Collection window click the Read Card button (Figure 11.60).
4. Click the Exit button when completed (Figure 11.60).

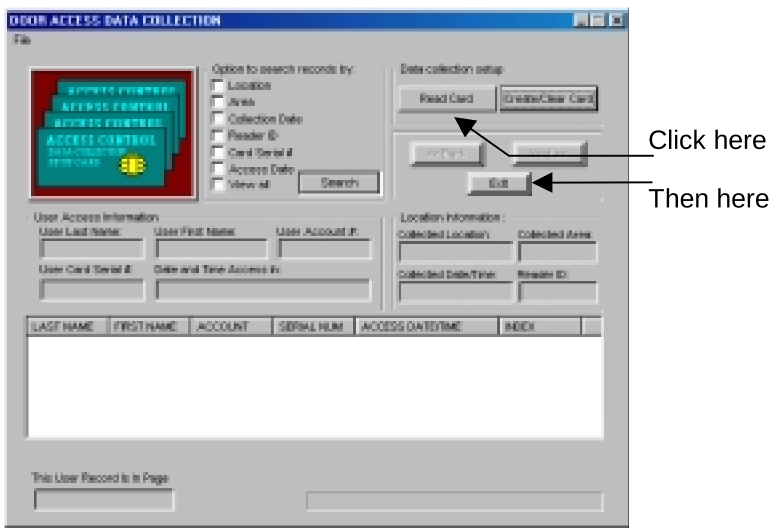

Figure 11.60 Reading the Door Access Data Collection Card

11.3. Door Access Reports

Door Access reports allow you to view or print a detailed report showing an individuals' usage of the Door Access Readers.

11.3.1. Viewing and Printing User Reports

Once data has been collected and transferred into the PC, follow these steps to view or print a report:

1. Click the Data Collection button in the Door Access Manager (Figure 11.61).

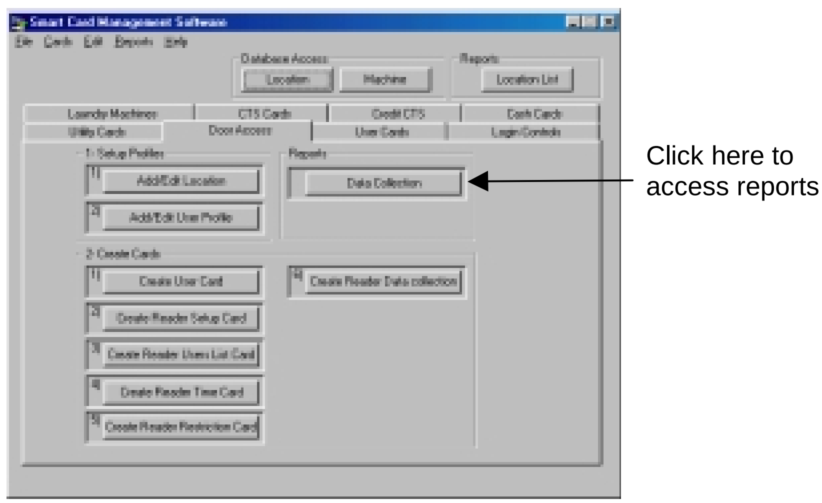

Figure 11.61 Door Access User Reports

2. A window specifying a date range will appear (Figure 11.62). Enter the beginning and ending collection dates for the desired report. Select the "No upper Bound" option to view a report containing all transactions since the "Start of range" field value or select the "No lower Bound" option to view a report containing all transactions leading up to the "End of range" value.

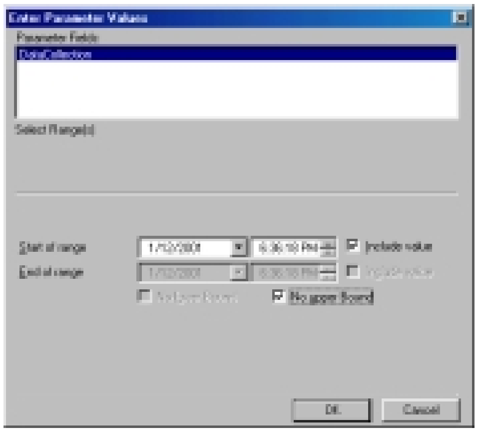

Figure 11.62 Date Range Window

3. Click OK when finished.

4. The report will be generated and appear on your screen. At this time either view it on the screen, or click the printer icon to print the report (Figure 11.63).

Click here to print report

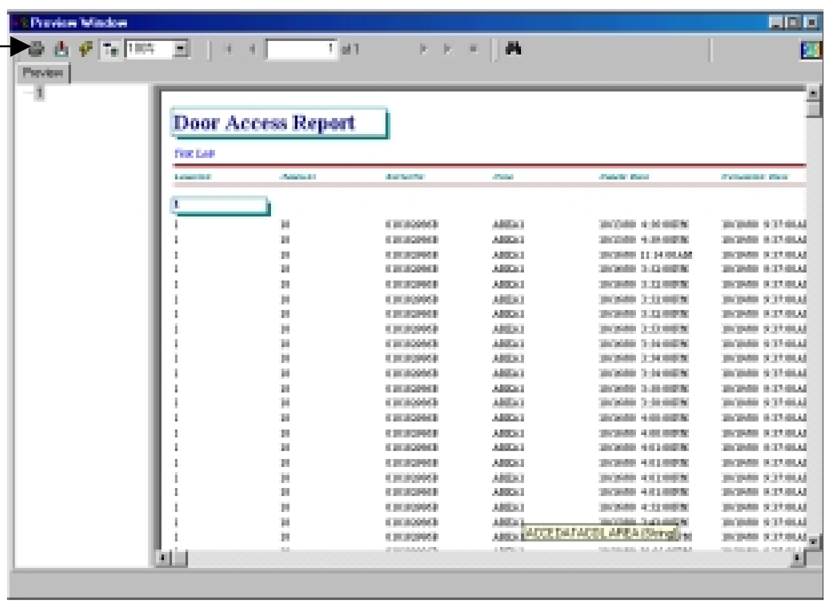

Figure 11.63 Door Access Report Window

11.3.2. Understanding User Reports

The report generated reflects all collected records for the date ranges that were specified.

Table 11.5 identifies and explains each field in the User Transaction Data Collection Report.

Table 11.5 Door Access Report

Field Name	Explanation
Account	User’s account number.
Location	Location of Reader.
Serial No	User’s card serial number.
Area	Area of reader.
Access Date	Date and time of access.
Collection Date/Time	The date and time of collection.

11.3.3. Deleting Collected Data

Warning!

A deleted data collection record cannot be recovered.

After collected data is no longer needed it can be deleted to save disk space.

1. In the Door Access Manager click the Create Data Collection button (Figure 11.64).
2. Select the criteria to search records by and enter the range into the appropriate field, or select View All.
3. Click the Search button.

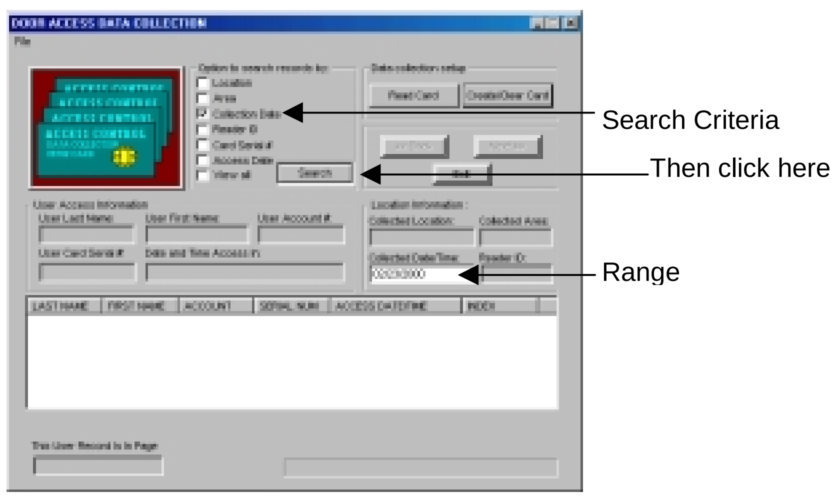

Figure 11.64 Searching Collected Data

4. Select collected data to delete (Figure 11.65).

5. Select Delete Selected Records from the File menu (Figure 11.65).

Then click here

Select record to delete

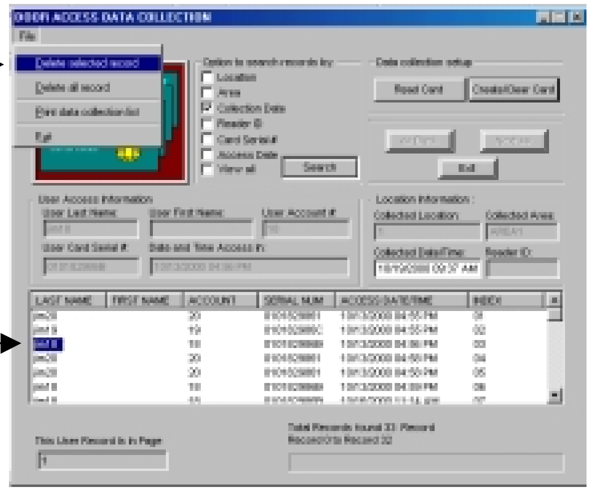

Figure 11.65 Deleting a Collected Record

Note:
You can also delete the entire database of data collections by selecting “Delete All Records” from the File drop-down menu.

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A. Importing a User List

There is a menu option in the **User Manager** dialog (under the File menu), to import the user list, which only an Administrator can do. The file will come on a floppy disk with a shipment of user cards if the system user has purchased that option (called card Serialization). The file will be tab delimited, and should contain two columns, which are the cross-reference of each card's externally printed number to the internal serial number of the card.

The first line MUST contain the Card's chip ID (numeric value, 0 = Solaic/Pocketbook, 1 = Bull Scot5), and optionally a file version number. Each subsequent line must contain 4 fields, separated by tabs.

Column 1 = External number, in decimal notation.

Column 2 = 4 byte card serial number, in decimal notation.

Column 3 = Location ID (supplied by the user)

Column 4 = Account ID (supplied by the user)

The recommended way to supply the 2 user fields is to:

1. Open the file in Excel, opening it as a tab delimited text file.
2. Enter the location ID to put on the cards in the third column of the first user record.
3. Paste that location ID down the list for all cards.
4. Supply an account ID for each record. The simplest technique is to use sequential Account IDs. Enter the starting account ID in the fourth column of the first record, and then use the Edit/Fill/Series option of Excel, and highlight fill down the column with a linear Series. **Account ID's MUST be unique.**
5. Save the modified database as a tab delimited text file using the file name "Serial Numbers.txt" into the SMS directory.
6. In the User Manager of SMS2 select Import User List from the File drop-down menu.

When imported, SMS2 creates a user record for each card, assigning all the above values and leaving all other information at its default (no name, address, etc). (The External number is the Tracking ID in SMS2). When users cards are handed out, the user information should be recorded (user name, address, the card's external number) so that the information can be entered into SMS2 to correctly reflect whom the card has been given to.

This feature is a quick way to allow the SMS2 user to create many user records in SMS2, and associate each user with a card. However, the SMS2 user is responsible for making sure that the cards corresponding to the imported data have the correct Location ID on them, and that they are created as User cards (this is generally accomplished with a CTS). Also, it should be noted that the CTS will create the cards as generic user cards, and that no advanced user features will be available (such as Initial Card Charge, or card Expiration date). The SMS2 user needs to create, or recreate, these types of user cards through SMS2 to enable these features.

B. Using a Logo in Printed Reports

A graphic, such as a company logo, can be included in SMS2 reports.

The graphic must be either a Bitmap (.bmp) or Jpeg (.jpg) digital file type. The logo cannot exceed a length of 225 pixels or a height of 50 pixels.

To include a logo in SMS2 Reports:

1. From the File drop-down menu click Select Logo (Figure 14.1).

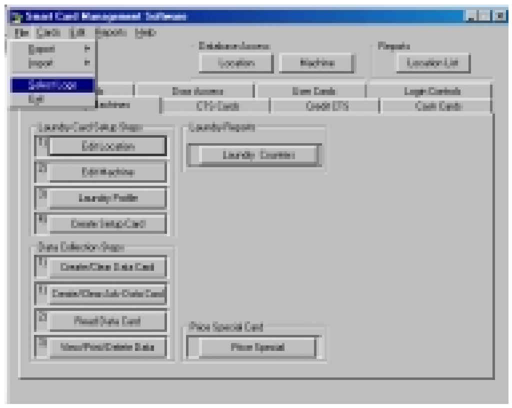


Figure 14.1 Selecting a Logo for Reports

2. Select either .bmp or .jpg file type from the Files of type drop-down menu (Figure 14.2).
3. Select file to insert as logo (Figure 14.2).
4. Click the open button (Figure 14.2).

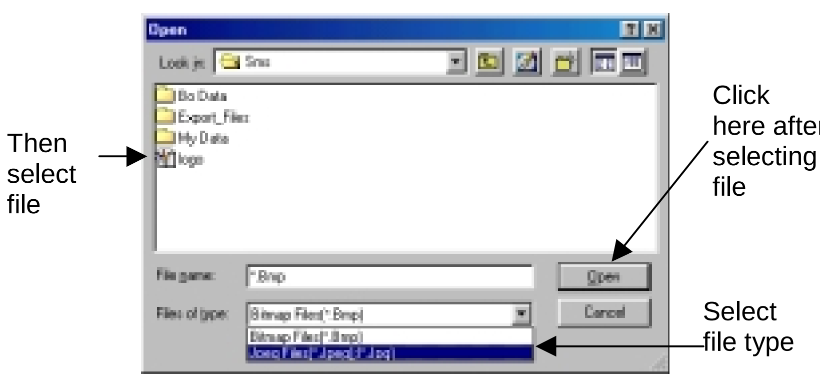


Figure 14.2 Opening the Logo

5. A confirmation window will appear stating the maximum allowed size of the logo. Click the Yes button to continue or No to cancel.
6. If logo was successfully selected, it will now be displayed in all SMS2 reports (Figure 14.3).

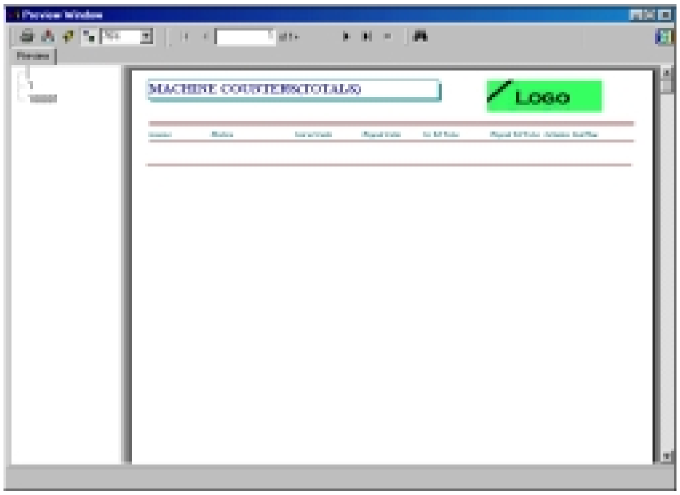


Figure 14.3 Report with Logo

C. Exporting SMS2 Databases

SMS2 reports can be exported and customized. Exported report data can be viewed or manipulated in a database or spreadsheet software package. SMS2 can export data in either a tab delimited or MS Access format.

Table 14.1 describes the databases that can be exported.

Table 14.1 Exportable SMS2 Databases

Name	Description
Axcoll.mdb	Door Access data collection information.
Crdsmade.mdb	Log of when User Cards and Cash Cards were created and by whom.
Datacol.mdb	Card Transaction Station and Laundry Machine Reader Counters.
Manager.mdb	SMS2 database including all Users, Machines, Profiles and Locations.
Transcol.mdb	Collected User Transactions.
All	Exports all databases.

To export a report:

1. Select Export from the file menu (Figure 14.4).
2. Select an export format – either Tab Delimited or MS Access (Figure 14.4).
3. Select a database (Figure 14.4).
4. The exported database has been copied to the “Export_Files” folder located in the “SMS” directory.

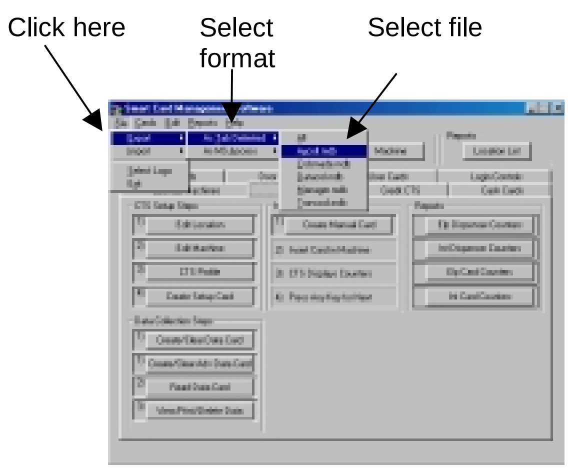


Table 14.4 Exporting Databases

UTILITY CARDS MANAGER 13

13.1.1. Overview

The Utility Cards Manager creates and tracks service cards, time cards and manual time cards.

13.1.1.1. Service Cards

Service Cards are used to initiate a service routine in all the machines of the Greenwald Intellicard Smart Card System. Once the machine is initiated into this mode, the functions and features of the service mode differ between the machine types. Please refer to the machine-specific instructions for more information on the service mode.

13.1.1.2. Time Cards

Since usage reports and time dependent functions are available for different machines, it is necessary to have the correct time set in these machines. The time card is set with a specified time, and sets the machine to that time when inserted.

13.1.1.3. Manual Set Time Card

The Manual Set Time card will also set the time for those machines that use time features. This card works by initiating a time setting mode in the machine. Please refer to the machine-specific instructions for more information about using the Manual Set Time Card.

13.1.2. Service Cards

13.1.2.1. Creating a Service Card

1. Click the Create Service Card button in the Utility Cards Manager (Figure 13.1).

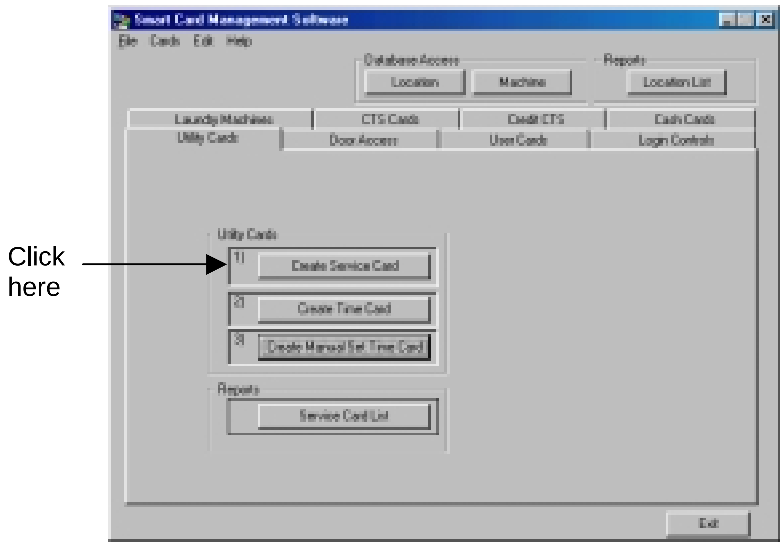


Figure 13.1 Creating a Service Card

2. Select a user from the User List Window (Figure 13.2), and proceed to Step 3. If the user is not in the system, proceed to Step 2a.
   a) Click the Add New User button.
   b) Enter an alphanumeric Account number. THIS IS A REQUIRED FIELD.
   c) Enter all other User Information.
   d) Click the Update button.

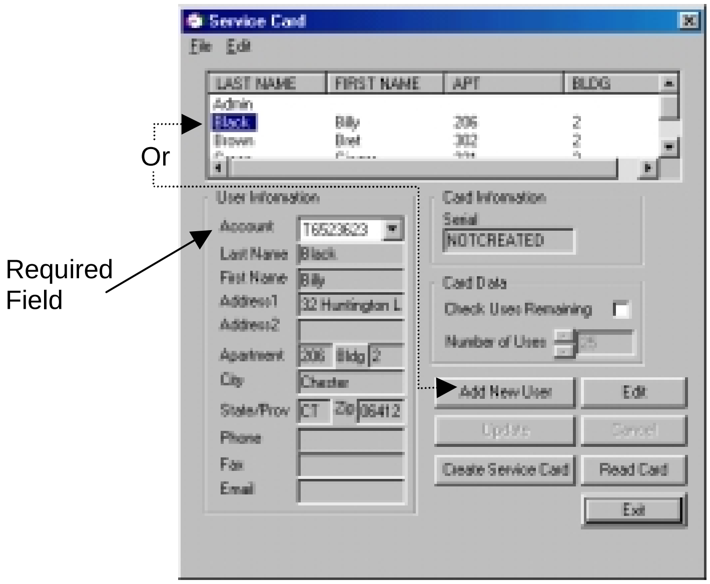


Figure 13.2 Selecting/Adding User

3. If this card is to be issued with only a limited number of uses, select the “Check Uses Remaining” option and enter the number of times this card can be used (Figure 13.3).
4. Insert a Smart Card into the PC Reader (Section 2.4.2).
5. Click the Create Service Card button (Figure 13.3).

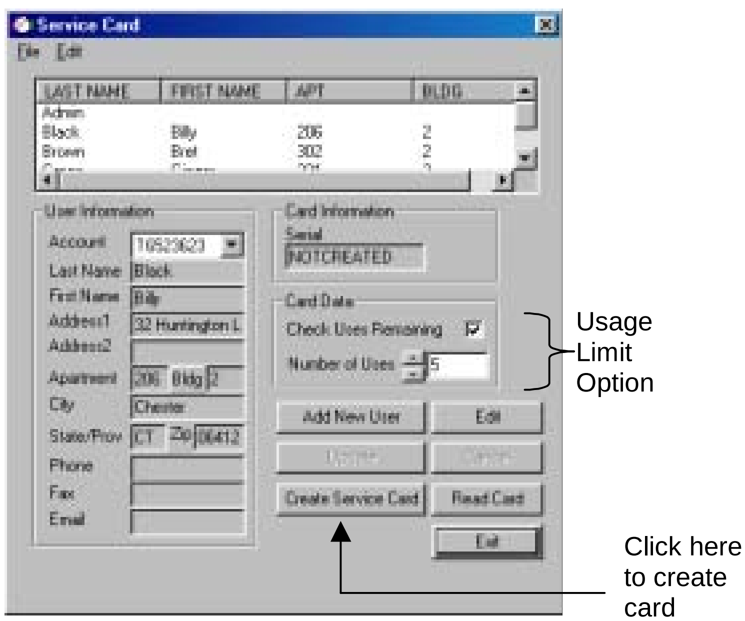
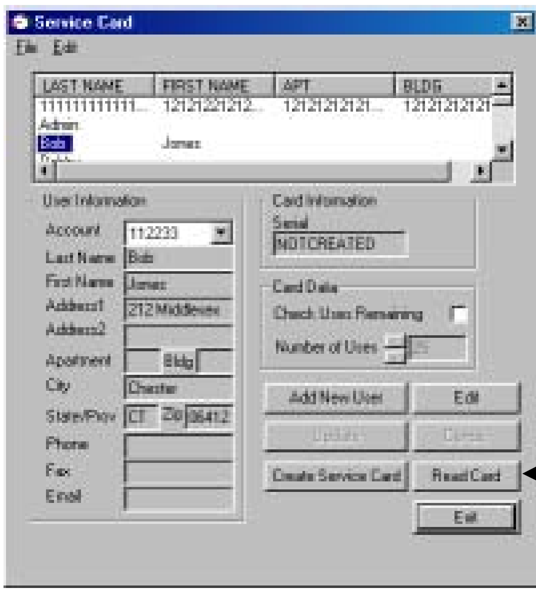


Figure 13.3 Creating a Service Card

13.1.2.2. Reading a Service Card

1. Click the Create Service Card button in the Utility Cards Manager (Figure 13.1).
2. Insert the Service Card into the PC Reader (Section 2.4.2)
3. Click the Read Card button (Figure 13.4)
4. The User and Service Card information will be displayed.



Click here

Figure 13.4 Reading a Service Card

13.1.2.3. Resetting a Serial Number

If a User has lost or damaged their card and a new card needs to be created, the serial number for that user's card needs to be reset.

1. Click the Create Service Card button in the Utility Cards Manager (Figure 13.1).
2. Select the user whose card is to be reset (Figure 13.5).
3. Click the Edit button.
4. Select Reset Card Serial Number from the Edit menu (Figure 13.5).
5. Click the Update button.

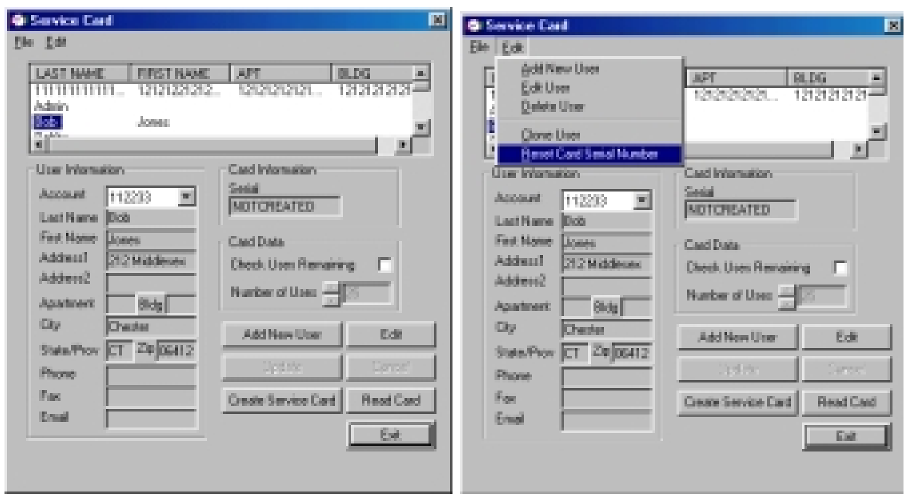


Figure 13.5 Resetting the Card Serial Number

13.1.3. Creating a Time Card

1. Click the Create Time Card button in the Utility Cards Manager (Figure 13.6).

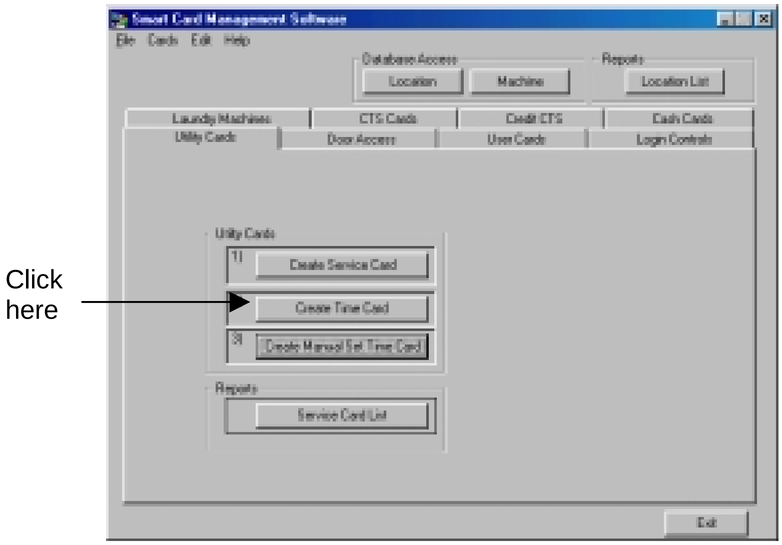


Figure 13.6 To Create a Time Card

2. If this card is to be issued with only a limited number of uses, select the “Check Uses Remaining” option and enter the number of times this card can be used (Figure 13.7).
3. Enable the “Create Card with Current Date/Time” option to create the Time Card with your PC’s Date and Time, or disable this option and enter the desired date and time (Figure 13.7).

Note:
Disabling this option allows you to create time cards to be used at a later time. It may not always be possible to know the time a machine will be programmed, in this instance, using the Manual Set Time Card is recommended.

4. Insert a Smart Card into the PC Reader (Section 2.4.2).
5. Click the Create Time Card button (Figure 13.7).

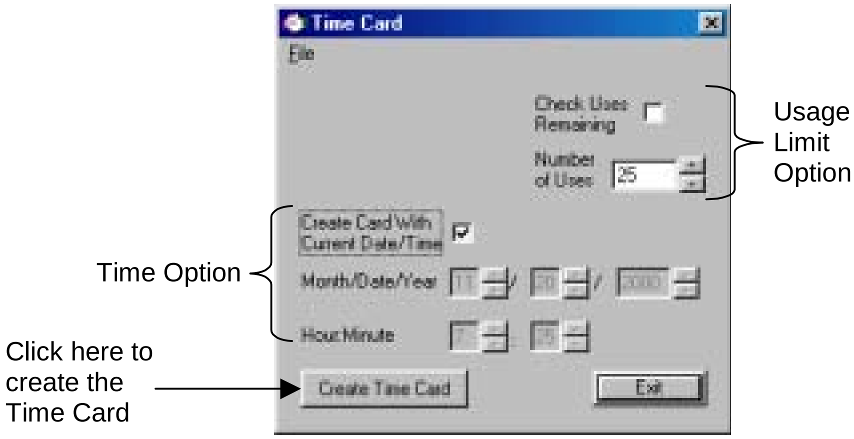


Figure 13.7 Creating a Time Card

13.1.4. Creating a Manual Set Time Card

1. Click the Create Manual Set Time Card button in the Utility Cards Manager (Figure 13.8).

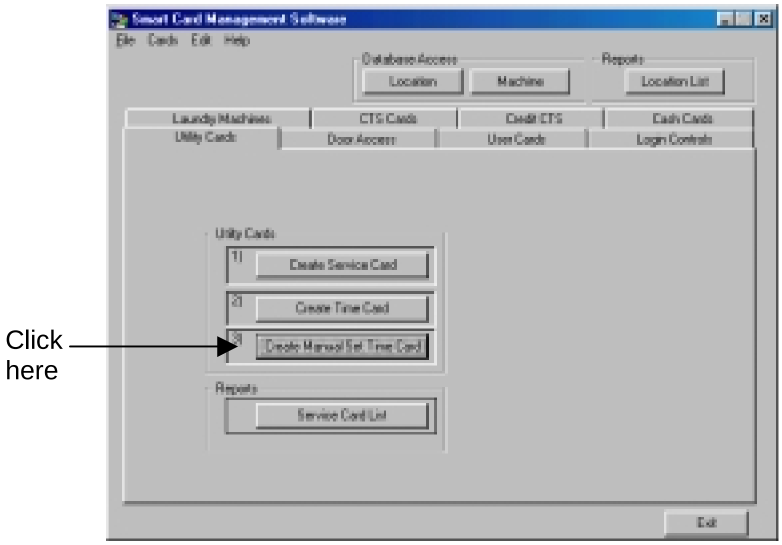


Figure 13.8 Creating a Manual Set Time Card

2. If this card is to be issued with only a limited number of uses, select the "Check Uses Remaining" option and enter the number of times this card can be used (Figure 13.9).
3. Insert a Smart Card into the PC Reader (Section 2.4.2).
4. Click the Create Manual Time Card button (Figure 13.9).

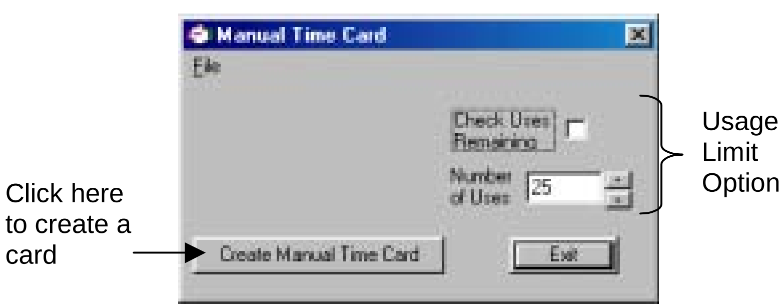


Figure 13.9 Creating the Manual Set Time Card

13.1.5. Service Card Report

The Utility Card Manager has the ability to generate a report providing the following information for each Service Card that was created:

- **Account –**account number of the user assigned to the Service Card.
- **First Name –**first name of the user.
- **Last Name –**last name of the user.
- **Serial Number –**internal serial number of the Service Card for the user.
- **Creation Date/Time –**date and time that the Service Card was created.

13.1.5.1. Viewing and Printing a Service Card Report

1. To open the report do one of the following (Figure 13.10):
   - Click on the Service Card List button in the Utility Cards Manager.
   - Select the Service Card List report from the Utility submenu of the Reports menu in the main window.

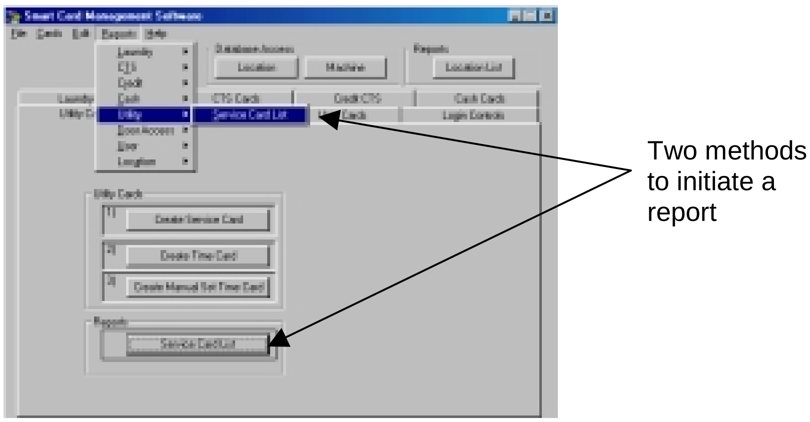


Figure 13.10 Opening the Service Card Report

2. The report will be generated and appear on your screen. At this time either view it on the screen, or click the printer icon to print the report (Figure 13.12).

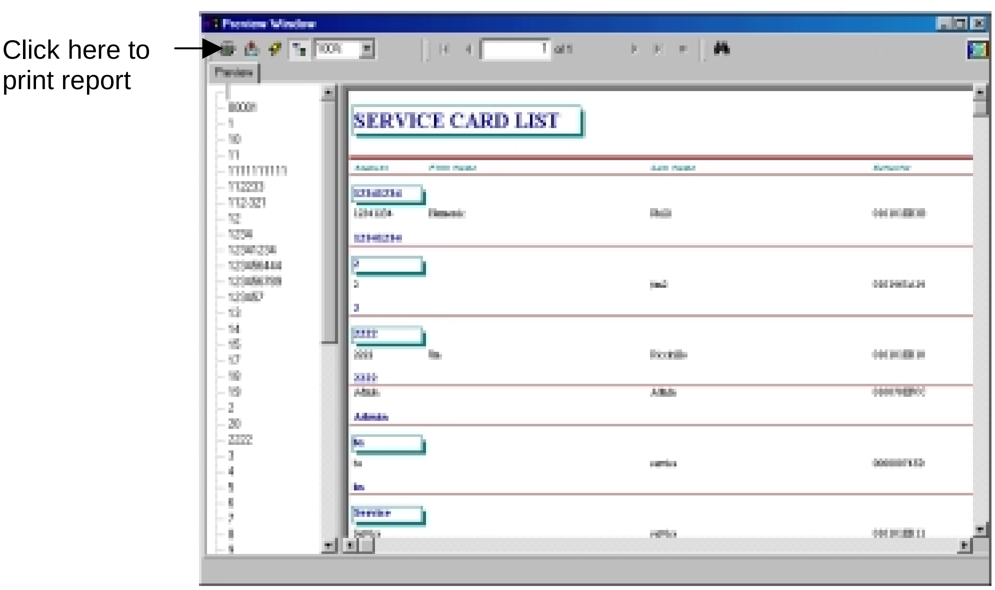


Figure 13.12 Utility Card Report Window

Cash Card Manager 12

12.1.1. Overview

The Cash Card manager has been implemented for creating cash cards for users when a transaction machine is not being used. Additionally, this manager can be used to add or subtract value from existing cards.

12.1.1.1. How Does it Work

The Cash Card Manager has a balance, which is set by a system user who is granted the privilege to do so (see Login Controls Manager). Using the balance, system users can create new Cash Cards, and add or deduct value from existing cards. Maximum value permitted on a Cash Card can also be set.

A record of each transaction is kept and can be viewed or printed.

Note:
The PC Balance can be used to account for all the money that is collected when issuing Cash Cards to users, or it can be used as virtual money with any figure entered to allow the system to work.

12.1.2. Using the Cash Card Manager

12.1.2.1. Setting/Changing the PC Balance

1. Click the Create New Cash Card button in the Cash Cards tab (Figure 12.1).

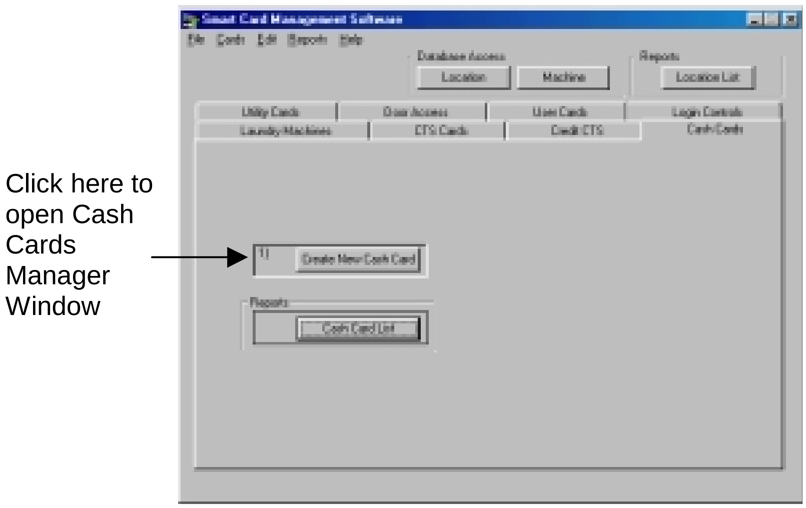


Figure 12.1 Opening the Cash Cards Manager Window

2. Enter a value in the Balance field (Figure 12.2).
3. Click the update button to save value (Figure 12.2).

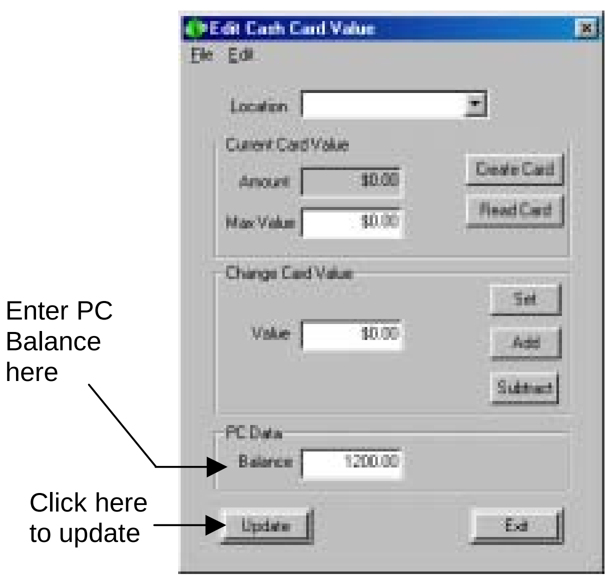


Figure 12.2 Changing the PC Balance

12.1.2.2. Setting/Changing the Maximum Card Value

1. Click the Create New Cash Card button in the Cash Cards tab (Figure 12.1).
2. Enter a value in the Max Value field (Figure 12.3).
3. Click the update button to save value (Figure 12.3).

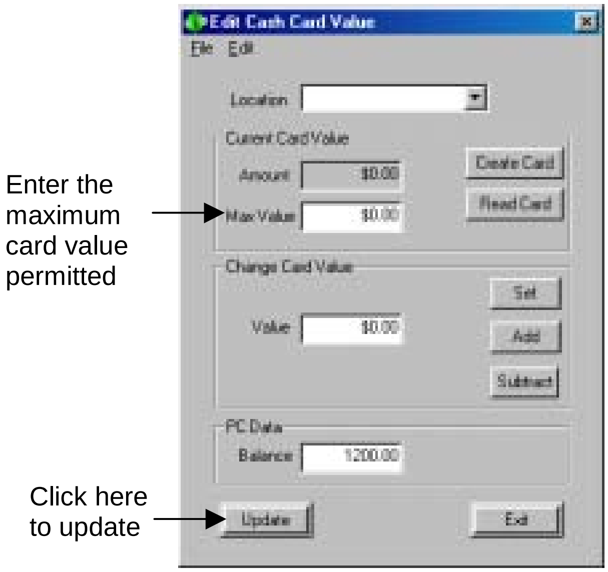


Figure 12.3 Changing the PC Balance

12.2.1.3. Creating a Cash Card

1. Click the Create New Cash Card button in the Cash Cards tab (Figure 12.1).
2. Select a Location ID from the Location pull-down menu (Figure 12.4).
3. Enter value if desired (Figure 12.4).
4. Insert a user Smart Card into the PC Reader (Section 2.4.2).
5. Click the Create Card button (Figure 12.4).

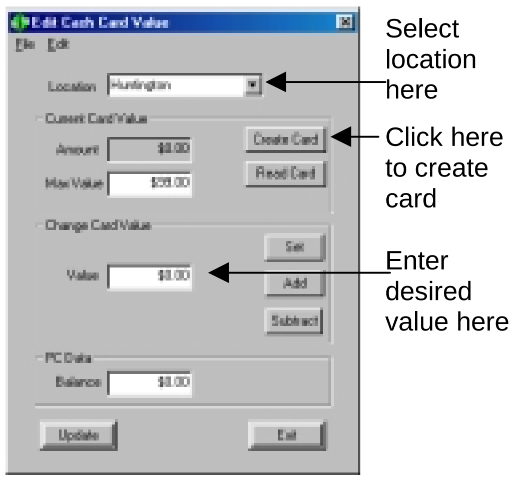


Figure 12.4 Creating a Cash Card

Warning!

If cards are created with the User Manager, they **MUST NOT** be recreated here. Doing so will delete any user data previously written to the card. Only use this manager to modify the card value.

12.1.2.4. Reading an Existing Cash Card

1. Click the Create New Cash Card button in the Cash Cards tab (Figure 12.1).
2. Insert the Cash Card into the PC Reader (Section 2.4.2).
3. Click the Read Card button (Figure 12.5).
4. The card's location and value will be displayed.

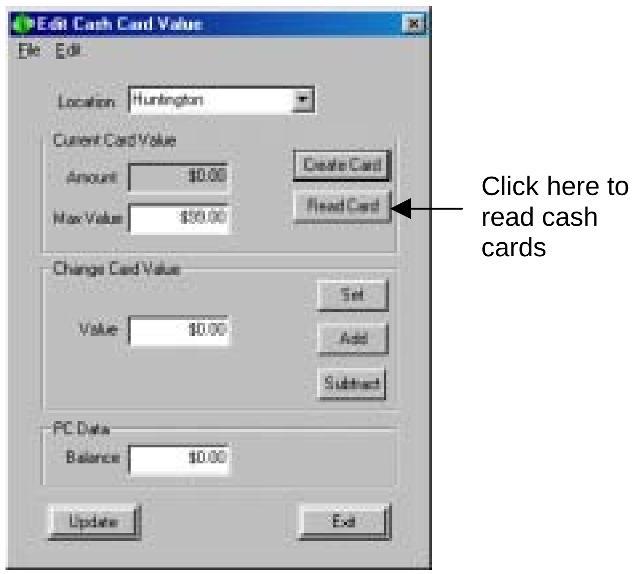


Figure 12.5 Reading a Cash Card

12.2.1.5. Setting Value to a Cash Card

Once a card is created, a value can be assigned to it.

1. Click the Create New Cash Card button in the Cash Cards tab (Figure 12.1).
2. Insert an existing cash card into the PC Reader (Section 2.4.2).
3. Enter a value to set to the card (Figure 12.6).
4. Click the Set button (Figure 12.6). PC Balance will be updated accordingly.

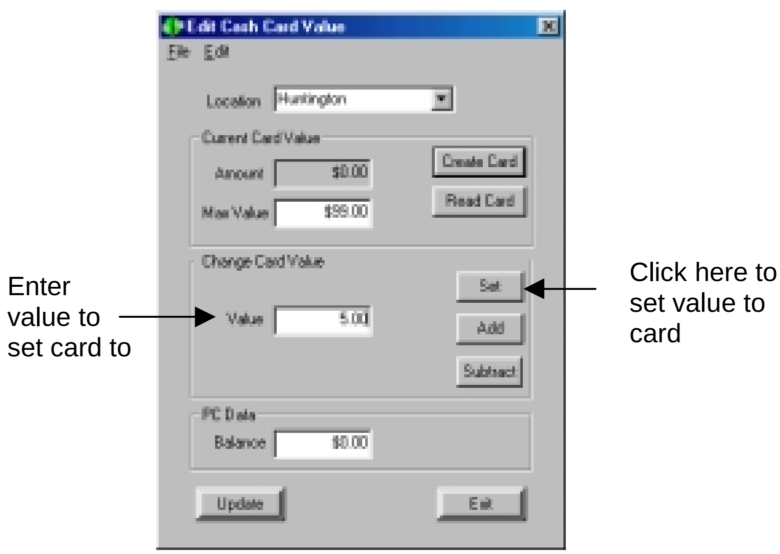


Figure 12.6 Setting Value to a Cash Card

Note:
This feature is useful when changing multiple cards with the same value. For example, adding $20 to User Cards.

12.2.1.6. Adding Value to a Cash Card

1. Click the Create New Cash Card button in the Cash Cards tab (Figure 12.1).
2. Insert an existing cash card into the PC Reader (Section 2.4.2).
3. Enter a value to add to the card (Figure 12.7).
4. Click the Add button (Figure 12.7).

Note:

The value entered will be added to the Cash Card and deducted from the PC Balance.

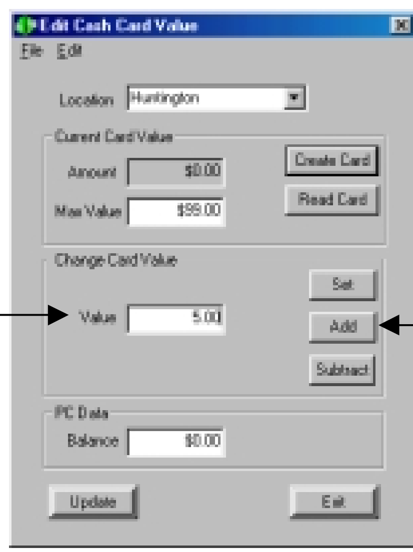


Figure 12.7 Adding Value to a Cash Card

12.2.1.7. Subtracting Value from a Cash Card

1. Click the Create New Cash Card button in the Cash Cards tab (Figure 12.1).
2. Insert an existing cash card into the PC Reader (Section 2.4.2).
3. Enter a value to subtract from the card (Figure 12.8).
4. Click the Subtract button (Figure 12.8).

Note:
The value entered will be Subtracted from the Cash Card and added to the PC Balance.

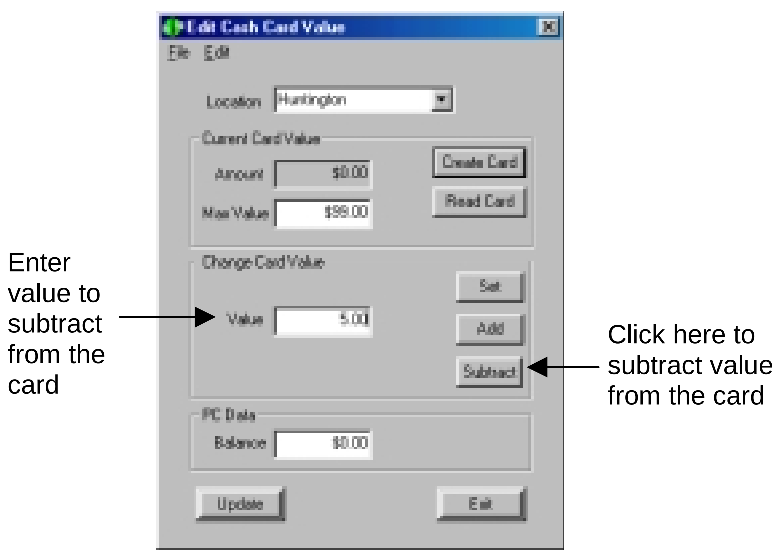


Figure 12.8 Subtracting Value from a Cash Card

12.1.3. Reports

A report showing each transaction conducted in the Cash Card Manager can be generated.

The report shows the following information:

- **Account –** user account for Cash Card (if applicable).
- **Login –** system user logged into SMS2 when this occurred.
- **Location –**location for which the Cash Card was created.
- **First Name –** system user's first name.
- **Last Name –**system user's last name.
- **Action –**description of the transaction (for example, Create).
- **Serial –**serial number of the card that was created or adjusted.
- **PC Balance –**balance after the value for the transaction has been deducted or added to the PC balance.
- **Amount –**total value of the transaction.
- **Creation Date –**date and time the transaction took place.

12.1.3.1. Viewing and Printing a Cash Card Report

1. To open a report, do one of the following (Figure 12.9):
   - Click on the Cash Card List button in the Cash Cards Manager.
   - Select the Cash Cards List report from the Cash submenu of the Reports menu in the main window.

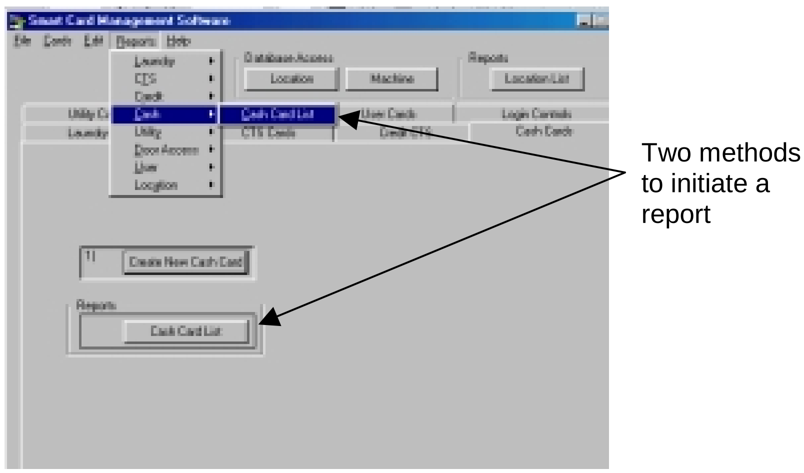


Figure 12.9 Opening the Cash Cards Report

2. A window specifying a date range will appear (Figure 12.10). Enter the beginning and ending collection dates for the desired report. Select the “No upper Bound” option to view a report containing all transactions since the “Start range” field value or select the “No lower Bound” option to view a report containing all transactions leading up to the “End of range” value.

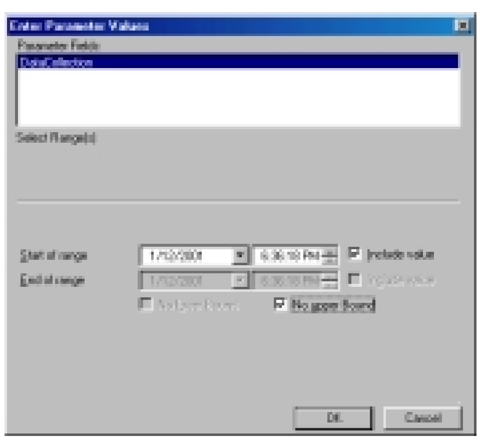


Figure 12.10 Date Range Window

3. The report will be generated and appear on your screen. At this time either view it on the screen, or click the printer icon to print the report (Figure 12.11).

Click here to print report

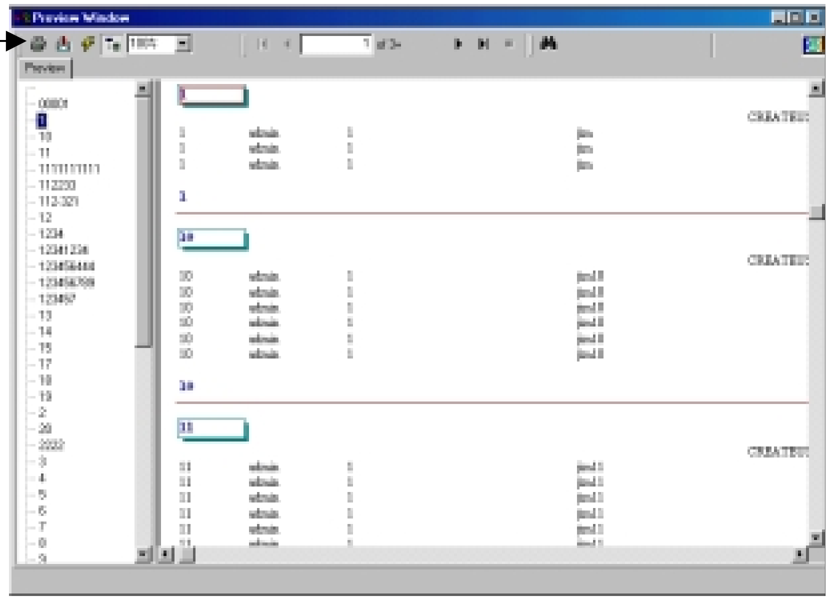


Figure 12.11 Cash Card Report Window