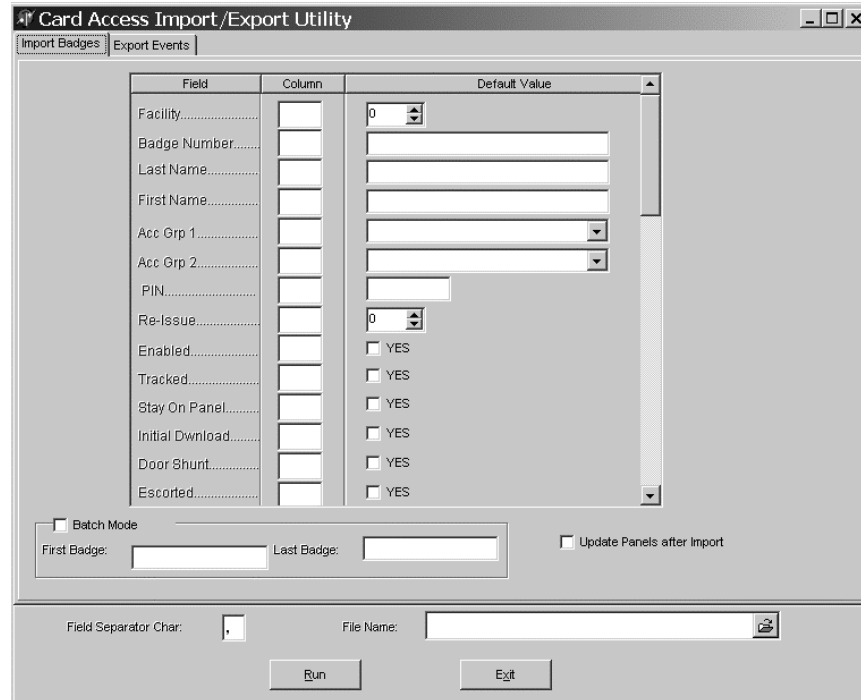## Import Utility

Figure 1102 – The Import Badges screen

The Import/Export utility has three selectable functions.

- **Import Personnel Information –** Personnel records can be created or updated by setting the Import/Export utility to import records from a text file. The type of file typically used as a source file is a 'comma separated value' (.csv) file.

  The comma separated value file is an industry standard text file organization scheme that is recognized by most file import capable database programs.

  However, the CardAccess Import/Export utility can also read files with field separators other than commas. Using another manufacturer's program, you are free to create an import source file that uses almost any typed symbol as a field separator. The symbol used in the source file is selectable in the Import/Export utility screen 'Field Separator Char' field on the 'Import Badges' folder tab. See more below

- **Batch Load Personnel Records –** You can use the Import/Export utility to create batches of badge records without using a source file

('Batch Mode'). You can set default values for selected fields and create as many <u>contiguously</u> <u>numbered</u> badges as you desire. Note that all badges will be created in the Personnel screen with the same default values that you selected in the Import Badges folder tab 'Default Value' column

- **Export Event Records –** The 'Export Events' folder tab contains controls which allow you to select the type of event messages you wish to export from the CardAccess main database to a 'character separated file' (again, you are allowed to select the separator character).

Perform a Basic Badges Import from File

To create a basic badges import, do the following

> **Warning –** The Import utility will overwrite any fields that you select in the 'Column' column **if** there is any data in the source file for that field. Therefore you must be sure that the source file contains approved changes or that the source file contains badge numbers that do not currently exist in the database (new records will be created in that case), existing records will remain untouched

Note: You must have a text source file already saved on your system that meets the requirements stated above for import.

- **Open the Import.exe Utility –** Open the Import utility by clicking the Import.exe shortcut available in the Configuration-> Reports -> Other Reports menu.

- **Import Badges –** The import badges tab should be selected by default. If it is not, click the import badges tab to activate it.

  Figure 1103 – The Import badges tab

- **File Name –** Select the file name of the text file you wish to use for badge import. Click the folder icon 📂 adjacent to the File Name field. This will open a Microsoft browser window. Navigate to the location of the file and click the file name to select it. Click 'Open'. The selected file name will appear in the File Name window.

  Figure 1104 – The File Name screen

- **Field Separator Char. –** Select the separator character that is being used in the text file. Click in the window adjacent to the Field Separator Char text. Enter the character by hitting the appropriate character on your keyboard. The default character will be a comma.

  Figure 1105 – The Field Separator Character screen
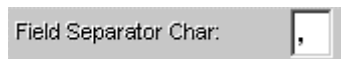
- **Column –** Enter a number in the Import/Export program 'Column' field that corresponds with the position of the data field in your source character separated field text file.

  Figure 1106 is a graphic of a typical comma separated value file with the column numbers indicated. Figure 1107 depicts the column fields in the Import/Export report where you are expected to fill in the relative column number of the filed that you want the Import function to use when it looks for data for the indicated field.

  For example, in Figure 1106 below, in every record in the source file, the last name is contained in column 1. You would therefore put the number 1 in the white space to the right of the 'Last Name' field in the Import utility (in the 'Column' column). Since the first name is in column 2 of the source file, you would type a 2 in the white space to the right of the 'First Name' field of the Import utility, etc.

  You can select as many or as few fields as you prefer. You may choose to ignore fields in the import file. That is, you can elect to import only one field from each record of the file, or all the fields in that file at your option.

  You are telling the utility what CardAccess Personnel screen field to store each field of the source file by using numeric pointers. The Import utility uses the commas as markers to locate the individual fields and it uses the new line character at the end of each line to locate the end of each record.

> **Note –** The source file you construct <u>must</u> contain a badge number field. There must be a unique number field included for each record in the file.

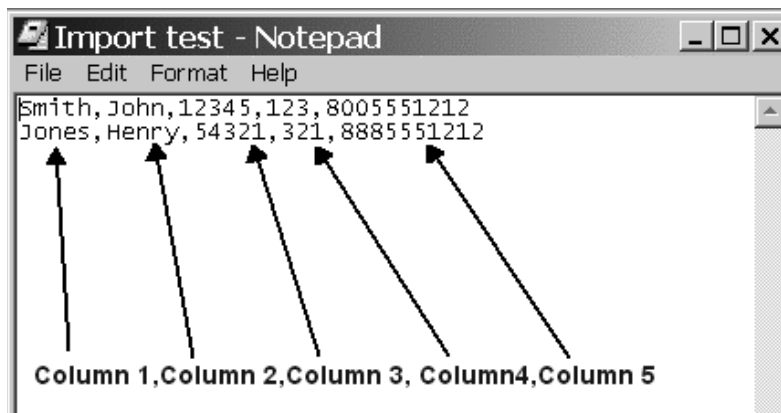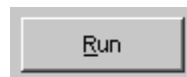Figure 1106 – The Text File Column Numbers

Figure 1107 – Import badges field and column screen

Note: In this basic example, we are not using any fields that require a 'Default Value' to be set. We will cover that option later in this section.

o **Run –** Click the Run button to run the utility and import your in information.

Figure 1108 – The run button

Import Utility Screen Controls

A detailed view of each of the Import badges and Export events utility screen controls follows

- **Import Badges Tab –** The Import Badges section of the import utility allows the user to populate fields in the Personnel screen by importing information from an outside source. This is meant to be a timesaving utility. By utilizing pre-existing text documents that contain important personnel information the user no longer needs to enter this information manually.

Figure 1109 – The Import Badges Tab Screen
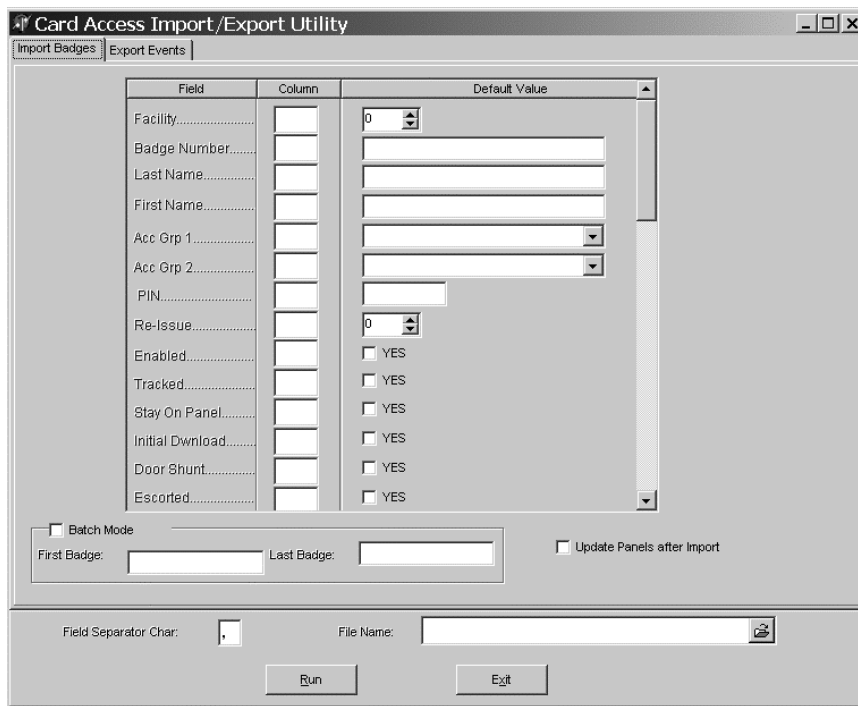
- **Field –** The 'Field' column is a list of all available importable fields located in the Personnel section of the CardAccess software. (See Figure 1109) There is nothing interactive regarding this column. This is a reference to insure that the imported information gets to the proper location.

- **Column –** The 'Column' column is used in conjunction with the text file that we will be importing information from.
  To use this feature, click the column window adjacent to the field you wish to import and enter the column number that corresponds to that field's placement in the text document. (See Figure 1110)

Figure 1110 – Text document example
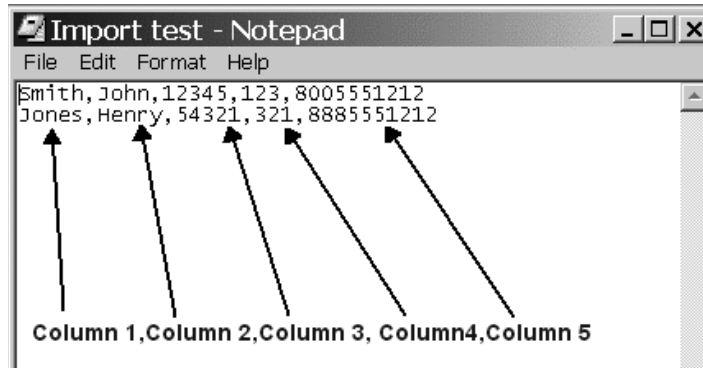
- **Default Value –** The default value column is used to set a 'global' value for any or all features in the Personnel screen. In other words, once a value is entered in one of these fields, the value will hold true for all badges imported that contain a 'Y' in the appropriate column of the text file.

  Example: If the user wishes to 'Enable' all the cards that are being imported then the user would create a column in the text document that would contain a 'Y'. Then the user would place a check in the 'Yes' checkbox adjacent to the 'Enabled' field and put the column number in column window.

  Some of the default values can be enabled with a checkbox while others require the user to select a value that has already been programmed in the personnel screen while still others allow you to enter custom text in the default value field. The section below will describe each feature in more detail.

- **Facility –** The facility field allows the user to select an existing facility code number that can be set during import. To use, select the code number (1-10) by clicking the up or down arrows adjacent to the facility default value window or by clicking in the same window and entering the value with the keyboard. Then click the column window and enter the column designation number for facility associated with your text document. When imported, this number will appear under the 'Facility' field in the Configuration>Personnel>General screen.

Figure 1111 – The Facility Code Screen

- **Badge Number –** The badge number field allows the user to enter a custom badge number that can be set during import. To use, click the default value window adjacent to the badge number field. Enter the number you wish to use. Then click the column window and enter the column designation number for badge number associated with your text document. When imported, this number will appear under the 'Badge Number' field in the Configuration>Personnel>General screen

Figure 1112 – The Badge Number Screen

- **Last Name –** The last name field allows the user to enter a custom last name that can be set during import. To use, click the default window adjacent to the last name field. Enter the text you wish to use. Then click the column window and enter the column designation number for last number associated with your text document. When imported, this text will appear under the 'Last Name' field in the Configuration>Personnel>General screen.

Figure 1113 – The Last Name Screen

- **First Name –** The first name field allows the user to enter a custom last name that can be set during import. To use, click the default window adjacent to the first name field. Enter the text you wish to use. Then click the column window and enter the column designation number for first name associated with your text document. When imported, this text will appear under the 'First Name' field in the Configuration>Personnel>General screen.

Figure 1114 – The First Name Screen

- **Access Grp 1 / Access Grp 2 –** The access group fields allow the user to select from a list, the access group they wish to assign to the badges that are imported. To use, click the arrow adjacent in the default value window next to the Access Grp 1 or 2 fields. A list of existing access groups will appear. Click on the access group you wish to use. The selected access group will appear highlighted in the access grp window. Then click the column window and enter the column designation number for Access grp 1 or 2 associated with your text

document. When imported, this selection will appear under the Access Group 1 or Access Group 2 field in the Configuration-> Personnel-> General screen.

Figure 1115 – The Access Group Rows

- **PIN –** The pin field allows the user to enter a custom pin code that can be set during import. To use, click the default value window adjacent to the PIN field. Enter the number you wish to use. Then click the column window and enter the column designation number for the pin column associated with your text document.

Figure 1116 – The PIN Code Screen

- **Issue Level –** The issue level field allow the user to select an existing issue level that can be set during import. To use, select the level number (1-99) by clicking the up or down arrows adjacent to the issue level default value window or by clicking in the same window and entering the value with the keyboard. Then click the column window and enter the column designation number for issue level associated with your text document. When imported, this number will appear under the 'Re-Issue' field in the Configuration>Personnel>General screen.

Figure 1117 – The Issue Level Screen

- **Fields with checkboxes –** The fields in Figure 1117 and Figure 1118 allow the user to select a feature to activate during import. To use, place a check in the checkbox adjacent to the feature you wish to activate. Then click the column window and enter the column designation number for that feature associated with your text document. When imported, a checkmark will appear next to activated feature in the Configuration-> Personnel-> General screen.

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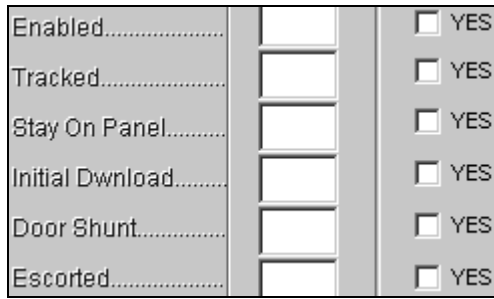
Figure 1118 – Fields with Checkboxes Screen

Figure 1119 – The Vehicle Tag Checkbox Screen

- **APB (Anti-passback) Setting –** The APB field allows the user to select from a list, the Anti-passback setting they can be activated during import. To use, click the arrow adjacent to the default value window next to the APB Setting feature. Click the APB setting you wish to use. The selected setting will appear highlighted in the APB setting window. Then click the column window and enter the column designation number for APB Setting associated with your text document. When imported, this selection will appear under the 'APB Control field in the Configuration-> Personnel-> Control screen.

Figure 1120 – The APB Setting Screen

- **Access Time –** The access time field allows the user to select a custom access time (1-90) in seconds that can be set during import. To use, select the amount of time by clicking the up or down arrows adjacent to the access time default value window or by clicking in the same window and entering the value with the keyboard. Then click the column window and enter the column designation number for access time associated with your text document. When imported, this number will appear under the 'Access Time' field in the Configuration-> Personnel-> General screen.

Figure 1121 – The Access Time Screen

- **Activation/Deactivation Date –** The Activation and Deactivation date field allows the user to select a custom date that can be set during

import. To use, select the date by clicking the date icon ▥. This will display a calendar date selection screen. Click on the date you wish to use. The selected date will appear in either the Activation or Deactivation date field depending on which one you are working at the time. Then click the column window and enter the column designation number for activation or deactivation date associated with your text document. When imported, the Activation Date will appear in the 'Activation Date' field and the Deactivate Date will appear in the 'Expiration Date' field in the Configuration-> Personnel-> General screen.

Figure 1122 – The Activation and Deactivation Date Screen

- **Group –** The group field allow the user to set from a list of pre-programmed Personnel groups. To use, click the arrow adjacent to the default value window in the Group field. Click on the group you wish to use. The selected group will appear highlighted in the default value window. Then click the column window and enter the column designation number for group associated with your text document. When imported, this number will appear under the 'Group' field in the Configuration-> Personnel-> General screen.

Figure 1123 – The Group Screen

- **Personal Information Fields –** The fields in Figure 1123 allow the user to enter custom information that can be entered during import. . To use, click the default window adjacent to the field you wish to import. Enter the text you wish to use. Then click the column window and enter the column designation number for select field associated with your text document. When imported, this text will appear under the proper field in the Configuration-> Personnel-> Personal screen.

Figure 1124 – The Personal Information Section Screen

- **Hire Date –** The hire date field allows the user to select a custom date that can be set during import. To use, select the date by clicking the date icon 🗓. This will display a calendar date selection screen. Click on the date you wish to use. The selected date will appear in the date field. Then click the column window and enter the column designation number for hire date associated with your text document. When imported, the Hire date will appear in the 'Hire Date' field in the Configuration-> Personnel-> Personal screen.

Figure 1125 – The Hire Date Screen

o **User Fields –** The fields in Figure 1125 allow the user to enter custom information that can be entered during import. . To use, click the default window adjacent to the field you wish to import. Enter the text you wish to use. Then click the column window and enter the column designation number for select field associated with your text document. When imported, this text will appear under the proper field in the Configuration-> Personnel-> Custom* screen.

*Note: The custom field within the System-> System Settings menu must be configured before these fields can be imported. See the System Settings section for detailed information.

Figure 1126 – The User Fields Screen
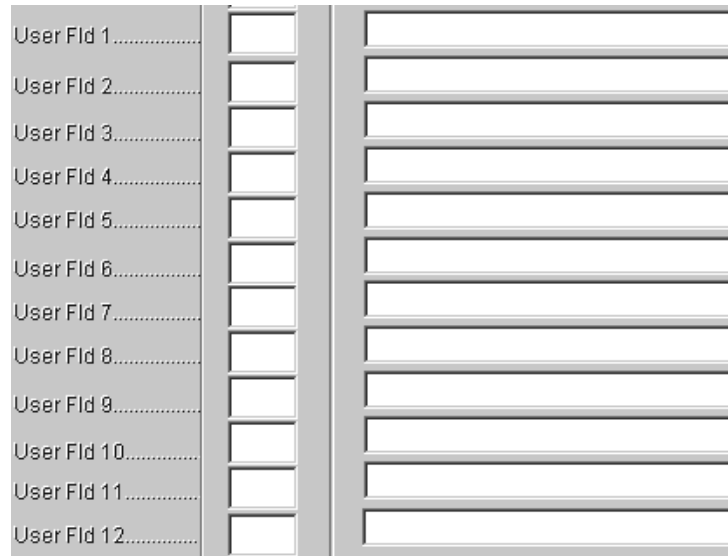
o **Photo Path Name –** This field allows the user to select a path to a picture file that can be set during import. To use, click the default window adjacent to the photo path name field. Enter the path to the file you wish to use. Then click the column window and enter the column designation number for Photo Path associated with your text document. When imported, this photo will appear under the photo window in the Configuration-> Personnel-> Photo screen.

Figure 1127 – The Photo Path Name Field

o **Batch Mode –** The batch mode feature allows the user to import a badge range of cards. Also, the user may set certain default criteria to be inserted at time of importing. Example: You just purchased one hundred new cards and that have consecutive numbers from 1 to 100. Click the checkbox adjacent to the Batch Mode field. This will activate this feature.

Notice that the File Name folder icon is grayed out. Click the window adjacent to the First Badge text. Enter the number 1 on your keyboard. Then, click the window adjacent to the Last Badge text. Enter 100 on your keyboard. We want to have the cards enabled when they are imported so we click the checkbox next to Enabled. Click Run. If you go to Access->Personnel there should be new badges inserted with card numbers of 1 to 100 and they should be Enabled.