

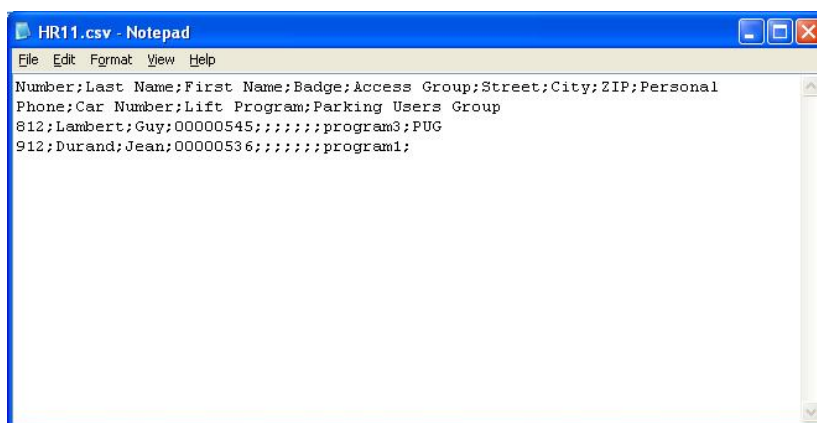
How to import cardholders in GuardPointPro from *.csv file

Introduction

Two cardholder import profiles allow to import cardholders into GuardPointPro by default: one from MS-Excel format file (Hr.xls) and another from MS-Access format file (Hr.mdb). It is also possible to create new import profiles which using another format import files. In addition, most systems know easily export their data in the 'CSV' format (Comma-separated values) which is a text format where each row represents a record and the data in a row are separated by a specific delimiter (comma, semicolon, etc.).

How to import cardholders in GuardPointPro from *.csv file?

1. Create one *.csv file with the same field names that are used in the Hr.xls file.

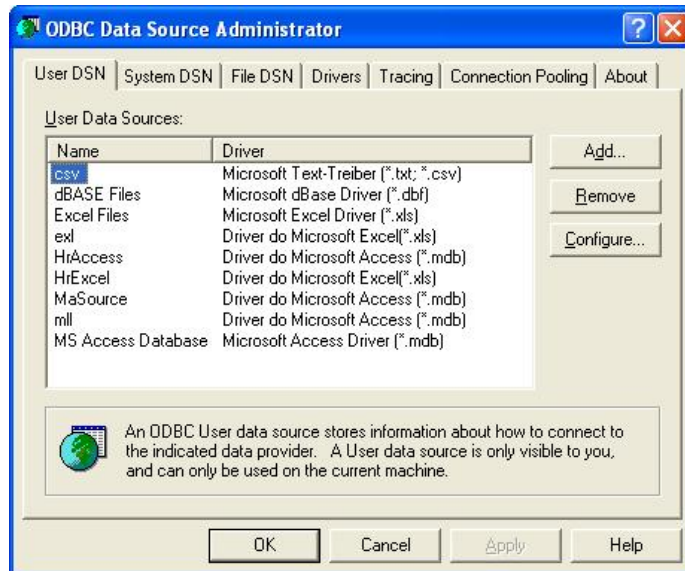


2. Place this file in the GuardPointPro folder.
3. Under GuardPointPro, create a new cardholder import profile by clicking New in this screen:

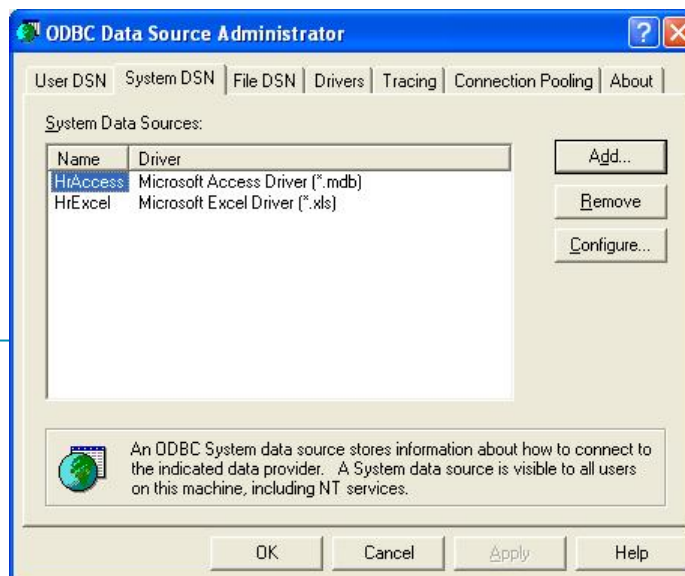


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4. In tab « Connection Settings », click on the « Set connection » button to open the following screen:

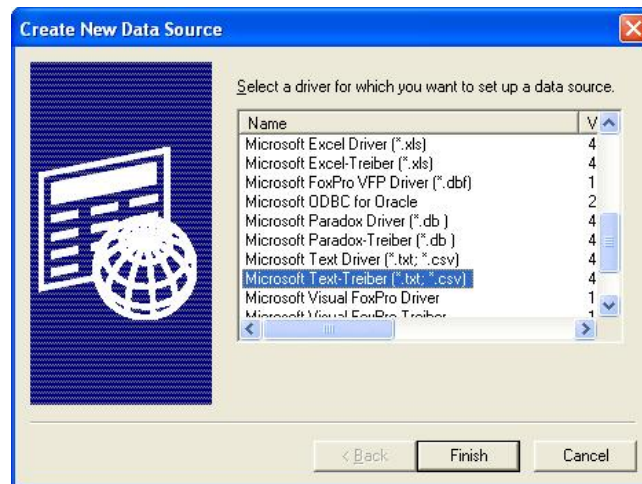


5. Click on the tab « System DSN », then « Add » to add a new connection ODBC.

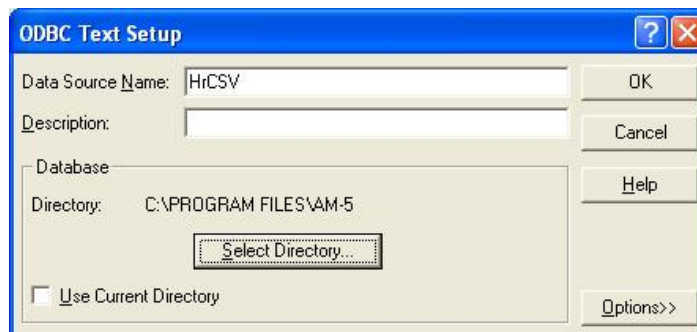


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6. Then, the following screen is displayed:

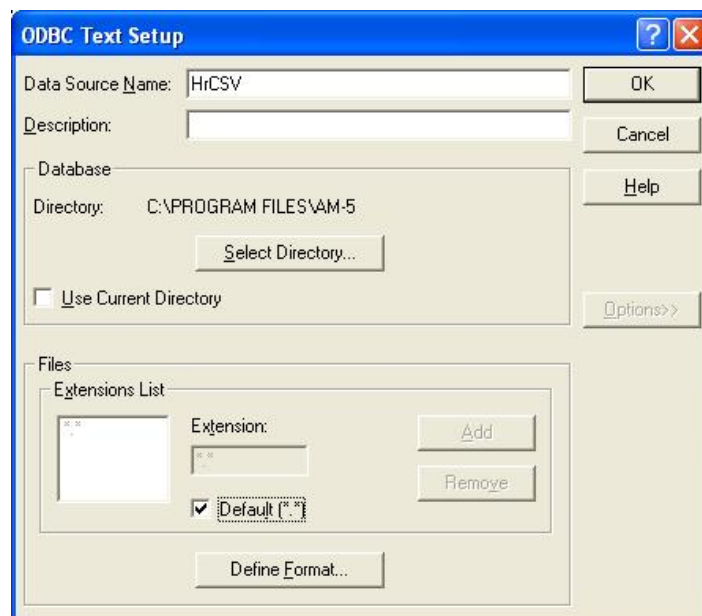


7. Click on « Microsoft Text-Treiber (*.txt; *.csv) » then « Finish ».
Give a name to the data source (ex. HrCSV) and unselect « Use Current Directory ».
Then, select the GuardPointPro folder by clicking on « Select Directory ».

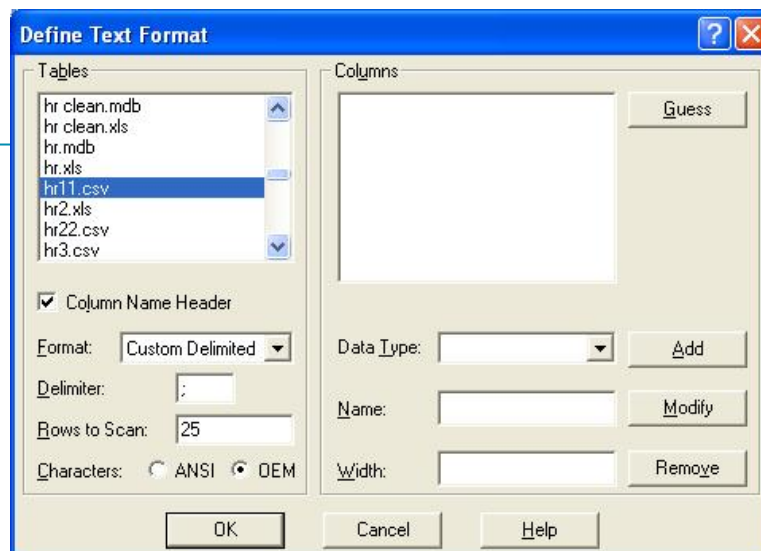


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8. Click on « Options » to display the complete window and on « Define Format » to define the CSV file format:

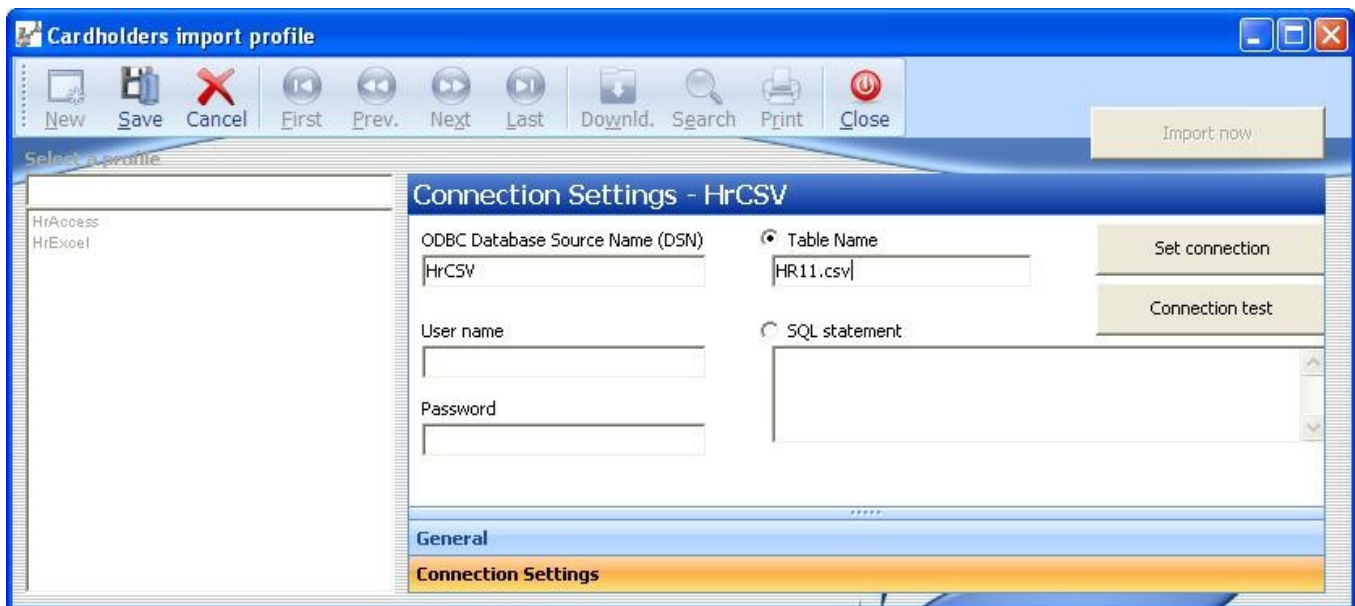


9. In this new screen, select in the left list, the CSV file created at the first step. Then click on « Column Name Header » and choose the format « Custom Delimited » by setting the relevant delimiter (e.g. ';').



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10. Click OK three times then, in GuardPointPro, fill the 'ODBC Database Source Name (DSN)' with the previous data source name (eg. HrCSV) and the 'Table Name' with the CSV filename (e.g. HR11.csv).



If the CSV file has fields name different from the regular ones (those used as column titles in the Hr.xls file), select the "SQL Statement" option for entering SQL query, which defines the relationship between field names of the file with those of GuardPointPro

Example of SQL query :

```
SELECT [Index] AS [Number], [Last] AS [Last Name], [First] AS [First Name] FROM users
```

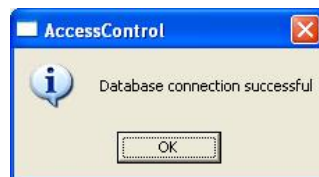
The following rules must be respected:

- The cardholder field [Number] is mandatory. It is a primary key field which corresponds to the "Number" field of the "Cardholder" screen in GuardPointPro In addition, this field must be a unique number.
- The [Last Name] field is also mandatory.
- [Last Name] and [First Name] fields are case sensitive.
- The first and last names combination has to be different for each cardholder; first or last name may be repeat, but not both.
- If new cardholder is imported with existing card number already allocated to an existing cardholder in the GuardPointPro database, the card is removed from the existing cardholder and it is allocated to the new imported cardholder.

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- If an imported cardholder has already a badge in the GuardPointPro database, the system is deleting the other badge.
- Importing new access groups automatically creates them in the GuardPointPro database
- When the option “Synchronize and delete” is checked, all cardholders that do not exist into the import file are removed from the GuardPointPro database.

11. Save and click on « Connection Test » to have the following message:



This message confirms both the connection to the import file and also the query syntax, if exists.

12. Click on « Import Now » to import cardholders from the CSV file.