

# GuardPointPro—How to import CSV files

GuardPointPro has the facility to import cardholders from CSV files.

To do this we need to setup & configure ODBC data sources through windows and then create an import profile in GuardPointPro.

Before we start with the ODBC configuration download the test.zip from [here](#) and extract the test.csv to your GuardPointPro folder

## Note:

if your row names in the CSV are the same as those of which GPP is expecting you cannot use "AS" in the statement.

SELECT [Number] AS [Number] FROM cards.csv - will not work

it must be

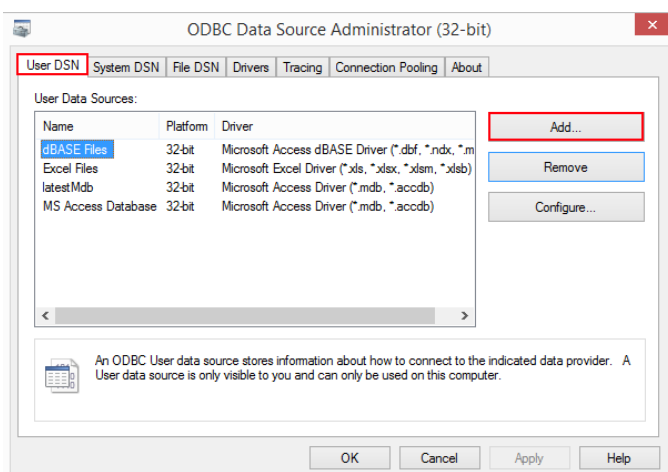
SELECT [Number] FROM cards.csv -- which will work

## Setup & Configure ODBC data sources

1. In Windows go to **Control Panel\System and Security\Administrative Tools** Double click on to the ODBC Data Sources (32-bit)

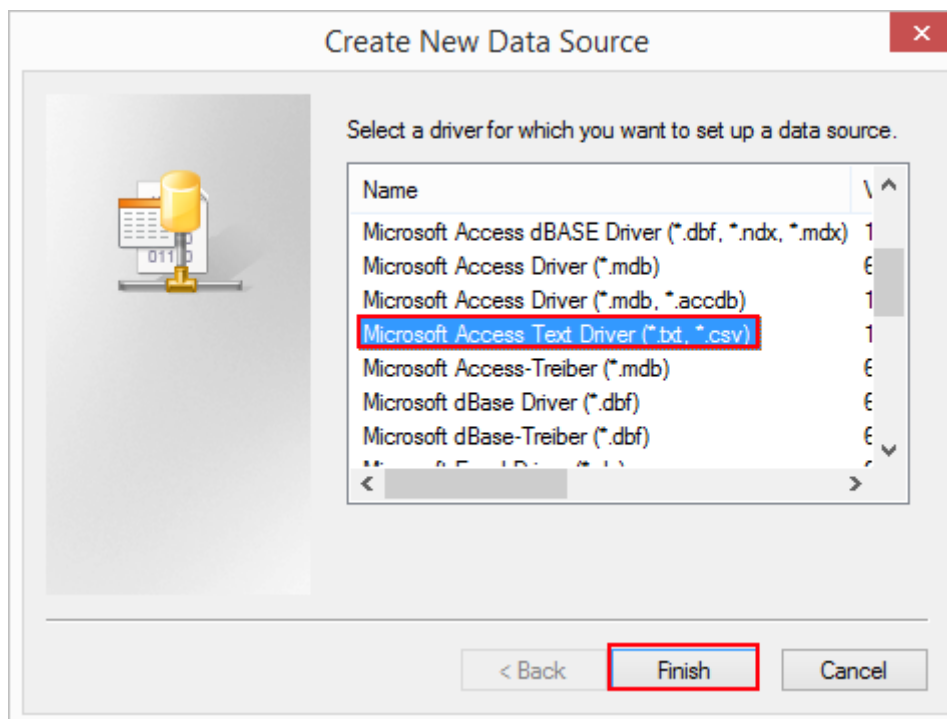
Name	Date modified	Type	Size
Component Services	22/08/2013 07:57	Shortcut	2 KB
Computer Management	22/08/2013 07:54	Shortcut	2 KB
Defragment and Optimize Drives	22/08/2013 07:47	Shortcut	2 KB
Disk Cleanup	22/08/2013 07:57	Shortcut	2 KB
Event Viewer	22/08/2013 07:55	Shortcut	2 KB
Internet Information Services (IIS) Manager	22/08/2013 07:50	Shortcut	2 KB
iSCSI Initiator	22/08/2013 07:57	Shortcut	2 KB
ODBC Data Sources (32-bit)	22/08/2013 00:56	Shortcut	2 KB
ODBC Data Sources (64-bit)	22/08/2013 07:59	Shortcut	2 KB
Performance Monitor	22/08/2013 07:52	Shortcut	2 KB

2. The ODBC data source administrator window will open

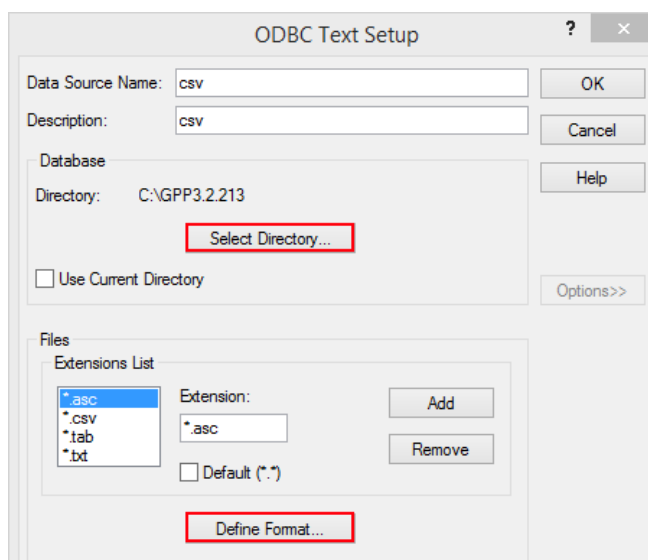


# GuardPointPro—How to import CSV files

The add data source window will open.  
Select Microsoft text driver and click finish

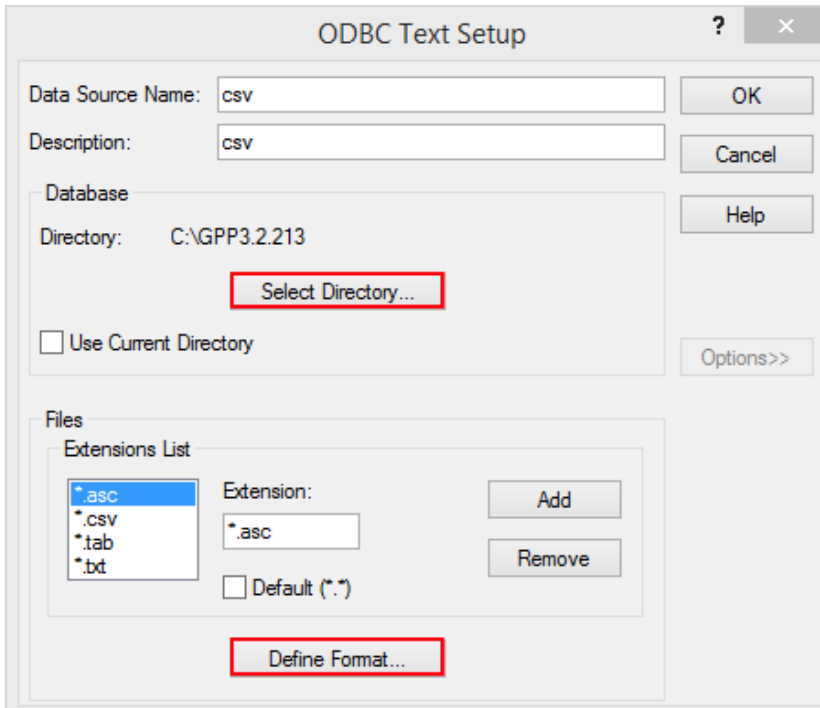


The ODBC Text setup window will open. Give the configuration a memorable Name and description in the Data Source Name feild



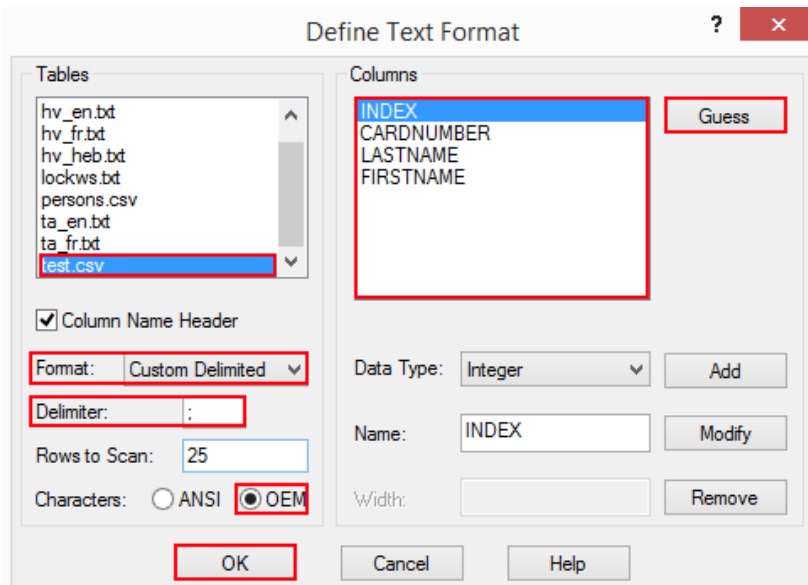
# GuardPointPro—How to import CSV files

At this window click the select directory button and browse to your GuardPointPro folder.



The ODBC Text Setup dialog box is shown. It has a title bar with a question mark and a close button. The 'Data Source Name' field contains 'csv' and the 'Description' field also contains 'csv'. There are 'OK', 'Cancel', and 'Help' buttons on the right. The 'Database' section shows the 'Directory' as 'C:\GPP3.2.213'. A 'Select Directory...' button is highlighted with a red box. Below this is a checkbox for 'Use Current Directory'. The 'Files' section has an 'Extensions List' with '\*.asc', '\*.csv', '\*.tab', and '\*.txt'. The 'Extension' field contains '\*.asc' and is highlighted with a red box. There are 'Add' and 'Remove' buttons. A 'Define Format...' button is also highlighted with a red box. An 'Options>>' button is at the bottom right.

Now click the Define Format button, this screen will appear



The Define Text Format dialog box is shown. It has a title bar with a question mark and a close button. The 'Tables' list on the left contains several files, with 'test.csv' selected and highlighted with a red box. The 'Columns' list on the right contains 'INDEX', 'CARDNUMBER', 'LASTNAME', and 'FIRSTNAME', with 'INDEX' selected and highlighted with a red box. There is a 'Guess' button next to the columns list. The 'Format' dropdown is set to 'Custom Delimited' and is highlighted with a red box. The 'Delimiter' field contains a semicolon (;) and is highlighted with a red box. The 'Rows to Scan' field contains '25'. The 'Characters' section has two radio buttons: 'ANSI' and 'OEM', with 'OEM' selected and highlighted with a red box. There are 'OK', 'Cancel', and 'Help' buttons at the bottom.

# GuardPointPro—How to import CSV files

From the **Tables** list select the **test.csv**

Click into the Column Name Header

From the **Format** drop down list select **Custom Delimited**

For the **Delimiter** field use the **;** symbol

Rows to Scan can be left at 25 [if using your won test with more than 25 rows, expand this number to the rows of your sheet]

Characters should have the **OEM** selected

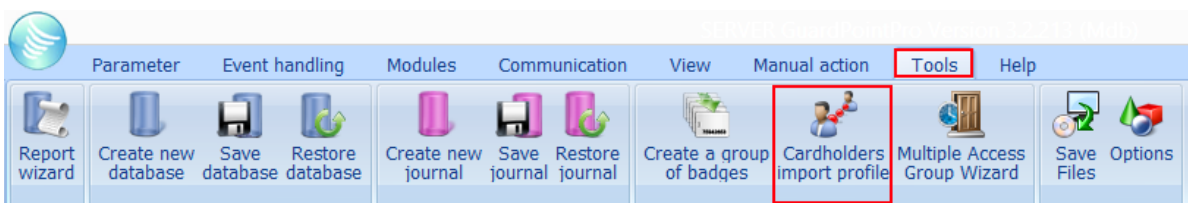
The **Columns** should now self populate with the columns from the test.csv sheet. If this does not happen then click the **Guess** button

Click the OK button

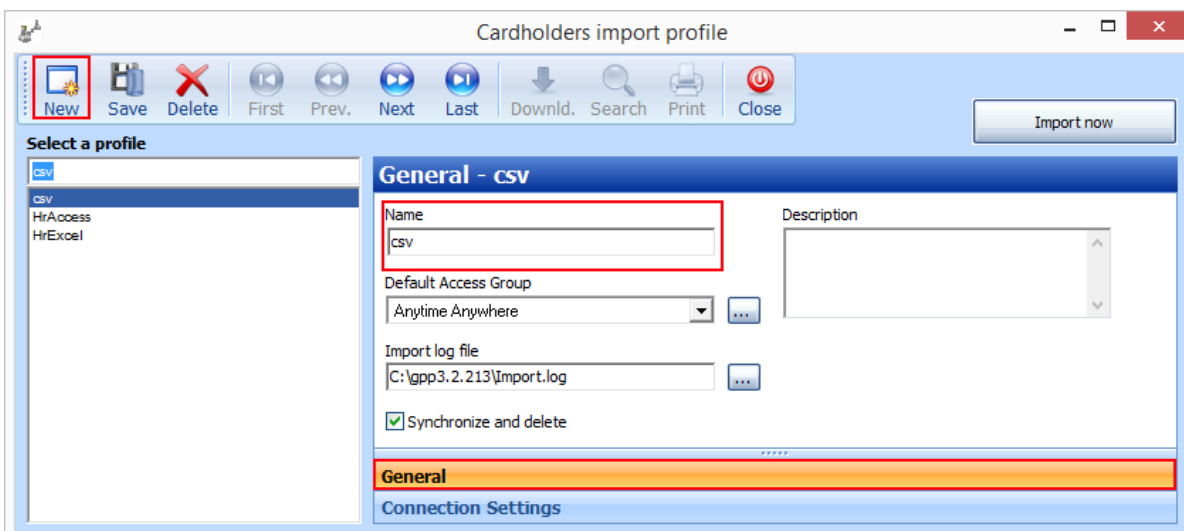
Back at the ODBC data Source Administration Window click OK, the window will close.

## Configuration of GuardPointPro import profile

1. At the GuardPointPro main menu click **Tools** then **Cardholders Import Profile**



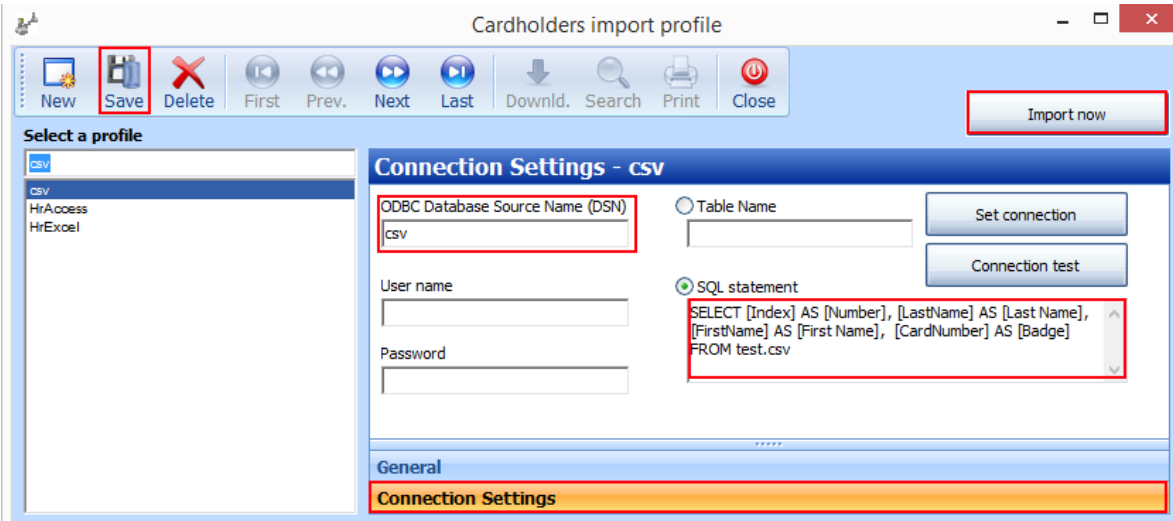
2. The Cardholders Import profile will now open.



Select **New** from the **General** tab, Name the new import profile something memorable and click **Save**

# GuardPointPro—How to import CSV Cardholde files

Now select the **Connection Settings Tab**



Give the settings profile a name in the ODBC Database Source Name (DSN) field.

Select the **SQL statement** radio button and paste this statement into the box:

```
SELECT [Index] AS [Number], [LastName] AS [Last Name], [FirstName] AS [First Name], [CardNumber] AS [Badge] FROM test.csv
```

Click **Save**

Click the **Import Now** button.

Once the import is complete you will see notification on the GuardPointPro log screen.

```
07/06/17 15:51:25 1000 Starting cardholders import on 07.06.2017 15:51:25
```

```
07/06/17 15:51:25 1000 End cardholders import on 07.06.2017 15:51:25
```

There is also a log of the import available in txt format in the guardPointPro folder called:

Import\_[date].log

Its output will inform you if the import has been successful and what was imported

```
*****
Starting cardholders import on Wednesday, 07 Jun 2017 11:16:11
Cardholders import profile: csv

07/06/2017 11:16:11 Cardholder James Greg (number=1) updated
07/06/2017 11:16:11 Badge: 00000155 OK
07/06/2017 11:16:11 Cardholder Dickinson Dave (number=2) updated
07/06/2017 11:16:11 Badge: 00000123 OK
07/06/2017 11:16:11 Cardholder Abrahms Abdul (number=3) updated
07/06/2017 11:16:11 Badge: 00000567 OK
```

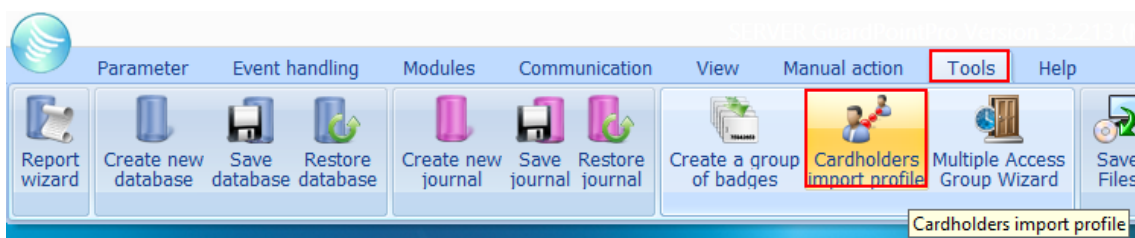


# GuardPointPro—How to import CSV Cardholder files

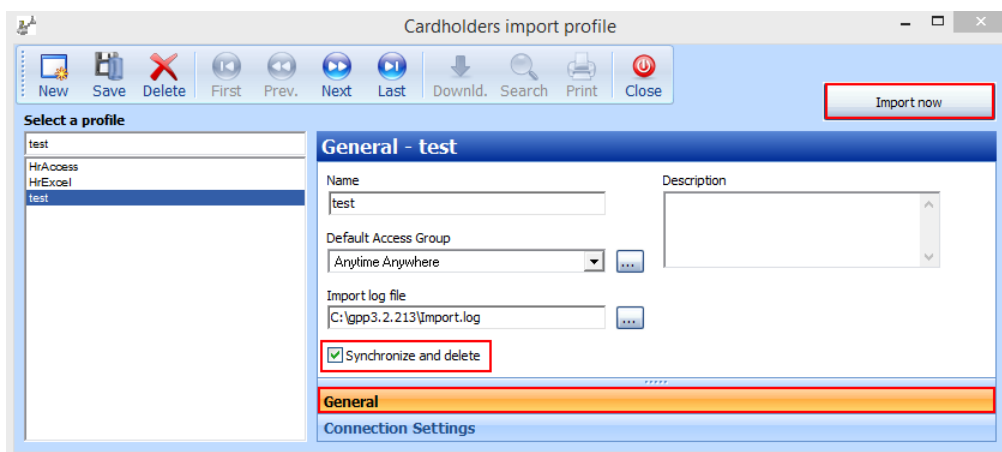
Once we have a successful import we can then synchronise the GPP database with CSV file.  
This feature can be configured to import on a time schedule using the ACM module in GuardPointPro

## Synchronise the GuardPointPro database with the CSV file when importing

1. At the main GuardPointPro menu go to Tools> Cardholder import profile



2. At the cardholder import profile window select your test CSV profile you made earlier, click into the synchronise and delete check box and save



Click the Import now button.

GuardPointPro will now synchronise its cardholder database with the contents of the CSV file including deleting any cardholders not currently in the CSV file

This is particularly use full if a 3rd party database, like active directory is able to export its users to CSV.

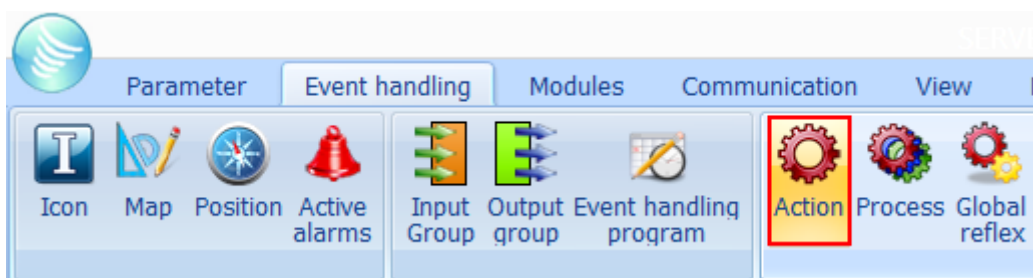
# GuardPointPro—How to import CSV Cardholder files

## Configuring GuardPointPro CSV import on a schedule.

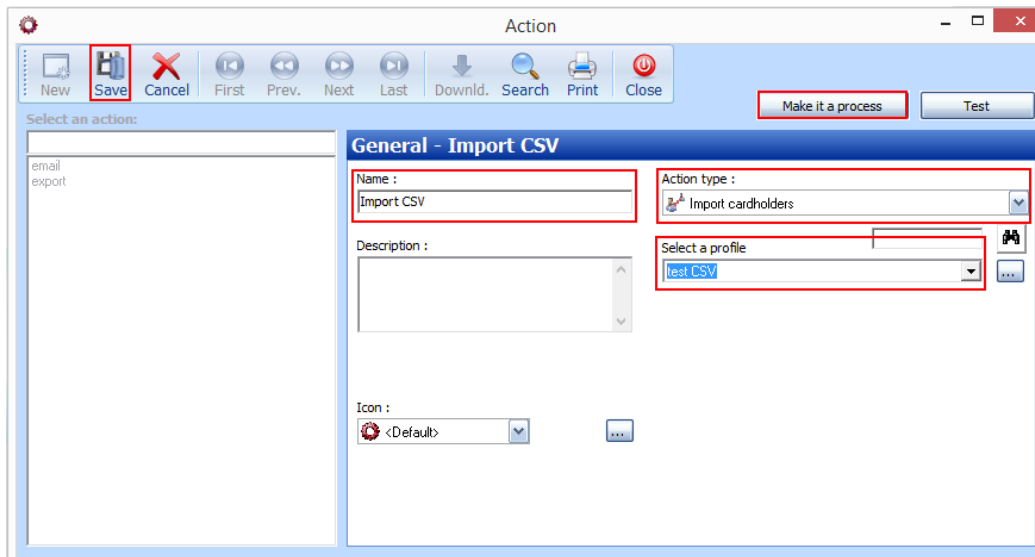
After you have configured GuardPointPro to import CSV files we can then set GuardPointPro to import the CSV file on a schedule.

**Note:** To use this feature GuardPointPro needs the ACM module

1. At the GuardPointPro main menu click Event Handling> Action



2. At the Action screen click New.



Give the new action a memorable name.

For Action type select Import Cardholder from the drop down list.

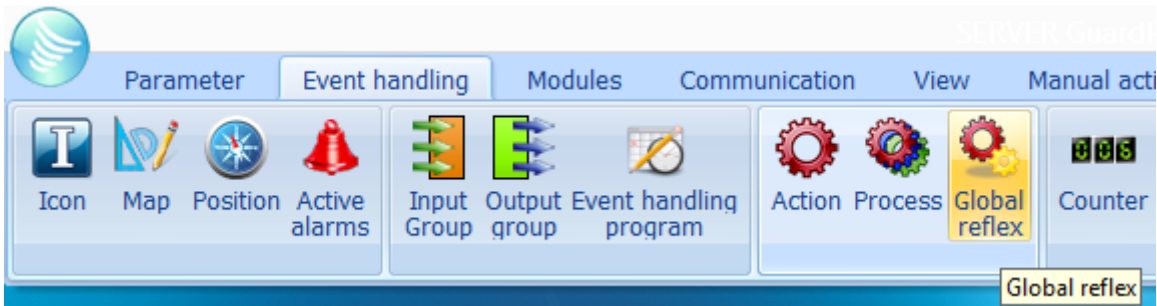
For Select a profile select the CSV profile you made earlier.

Save the action.

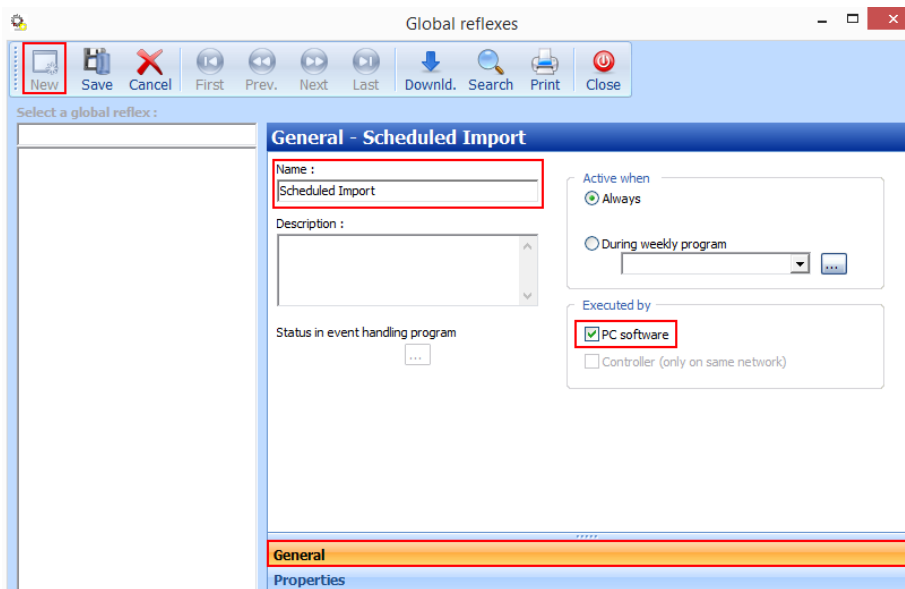
Click Make it a process button—You will receive an on screen message saying the process has been successfully created

# GuardPointPro—How to import CSV Cardholde files

- At the GuardPointPro main menu select Event handling> Global Reflex



The Global Reflex screen will open.



Click New to create a new Global Reflex.

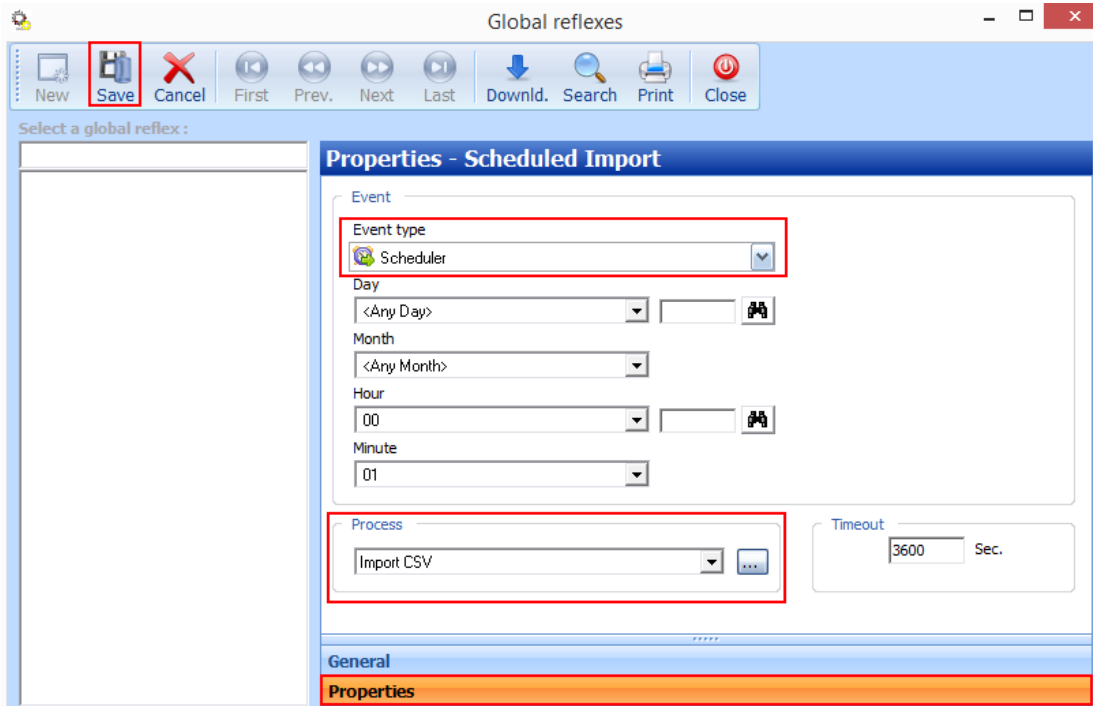
Give the new Global Reflex a memorable name

Ensure Executed by has PC software selected [This means that the Global reflex will only be triggered if GuardPointPro is open & running]



# GuardPointPro—How to import CSV Cardholde files

Click onto the Global reflex screen properties tab



The screenshot shows the 'Global reflexes' window with the 'Properties - Scheduled Import' tab selected. The 'Event type' dropdown is set to 'Scheduler'. The 'Day' dropdown is set to '<Any Day>', 'Month' to '<Any Month>', 'Hour' to '00', and 'Minute' to '01'. The 'Process' dropdown is set to 'Import CSV'. The 'Timeout' is set to '3600 Sec.'. The 'Save' button in the toolbar is highlighted with a red box. The 'Properties' tab in the bottom navigation bar is also highlighted with a red box.

For Event Type select Scheduler.

We have to now select when the import will happen.

In my example I want the import to happen everyday at 00.01

I choose any day, any month, 00 hour & 01 minutes.

The scheduler will now run every day of the year at 00.01.

For Process select the process you made earlier

Click save