

## VP-Importing a batch of cardholders

Cardholder information can be imported into VantagePoint as a batch. This can be particularly useful if you are swapping from a previous system.

The batch import window is located in the cardholder management window under the batch process tab.

your cardholder list must be stored in one of these formats:

CSV(comma delimited) TEXT (comma delimited) Excel (xls,xlxs) -Note: if using excel you must have excel installed on the VP computer The structure/format of your list must be in the following:

ID, Name, Company, Department, Title, Card number, Password

for example: (also see attached file testImport.xlsx at the bottom of the page)

11005John sensoracesssales Dept Mr123411006Dave daves compmanagementDr12345611007EricMicrosoft ITMr1112580ID,Name and card number are compulsory.IDIDID

Once you have opened your import file you will see its contents displayed:

| Card Holder Management       Time Schedule Management       Access Right Management       Baltah Process         and Holder Batch Upbad       Card Holder Batch Modification       Cand Holder Data Batch Import         Import File       Data Format: Di, Name, Company (Mulable), Department (Mulable), Card (or PIN), Password (Mulable or 4 Digits)         Fee Type: CSV (Comma Delmited), TECK (Morason Excel Installed, Jf Moroson Excel Is not installed, store the contents of the excel file in CSV or TEXT format to import.         Import File       Criguesr (Ado Own (Desktop Vestimport, Max         Access Right       Al |     |
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| Import File           Data Format: ID, Name, Company(Nullable), Department(Nullable), Title(Nullable), Card(or PN), Password(Nullable or 4 Digits)           File Type: SV(Comma Delimited), EXCI Workbook/sip, stax)           Caution: To use the Evoid file you must have Microsoft Evoid in stalled. If Microsoft Evoid is not installed, store the contents of the excel file in CSV or TEXT format to import.           Import File         C: Users Rob Oven/Desktop/testImport.vlsx         Open         P           Access Right         Al <ul> <li>Apply All</li> <li>Import File</li> </ul>                                     |     |
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| ▶ 2 11006 Dave daves comp management Dr 123456 0000 All   |     |
| 1 11005 John sensoracess sales Dept Mr 1234 0000 test   |     |



## **VP-Importing a batch of cardholders**

By holding the shift key you can select multiple cardholders and choose the desired access groups for them by using the access right drop down menu and apply button above. you may also edit fields in this window as well.

Once you are happy with the data to be imported you can then click "Register" and this will begin the import process

| 🔄 Card I   | Holder Man   | agement                                    | :: Vantag     | ePoint               |                         |        |                  |          |              |             |            |        | ,    | < |
|--|--|--|---------------|----------------------|-------------------------|--------|------------------|----------|--------------|-------------|------------|--------|------|---|
| Card Holder Management   |  |  |               |                      |                         |        |                  |          |              |             |            | Locout | Evit |   |
|  |  |  |               |                      |                         |        |                  |          |              |             |            | Luguut |      |   |
| Integra  | ated Search  | Card H                                     | lolder Managi | ement Time S         | chedule Management      | Access | Right Management |          |              |             |            |        |      |   |
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|  | cess Right   |  |               |                      |                         |        |                  |          |              | 🗹 Apply All |            |        |      |   |
|  |  |  |               |                      |                         | Clear  |                  |          |              |             |            |        |      |   |
|  | Index  |  | Name          | Company              | Department              |        | Card(or PIN)     | Password | Access Right | Remark      | Status     |        |      |   |
|  |  |  |               |                      |                         |        |                  |          |              |             | Registered |        |      |   |
|  |  |  |               | daves comp           | management              |        | 123456           |          |              |             | Registered |        |      |   |
|  |  |  |               | sensoracess          | sales Dept              |        |                  |          |              |             |            |        |      |   |
|  |  |  |               |                      |                         |        |                  |          |              |             |            |        |      |   |
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|  |  |  |               |                      |                         |        |                  |          |              |             |            |        |      |   |
| Select Multiple - Allows more than one choice to be selected. Usually done by holding down the CTRL key or the SHIFT key while selecting.  |  |  |               |                      |                         |        |                  |          |              |             |            |        |      |   |
|  |  |  |               |                      |                         |        |                  |          |              |             |            |        |      |   |
|  | imports photo  | images of                                  | cardholders r | matching by cardhold | er ID                   |        |                  |          |              |             |            |        |      |   |
| Fi   | e Name Form  | at: ID - File                              | Extension Ty  | pes: *.jpg, *.png, * | .bmp - Example: 123456. | jpg    |                  |          |              |             |            |        |      |   |
|  |  |  |               |                      |                         |        |                  |          |              | Browse fo   | r Folders  |        |      |   |
|  |  |  |               |                      |                         |        |                  |          |              |             |            |        |      |   |
|  |  |  |               |                      |                         |        |                  |          |              |             |            |        |      |   |

if there are any problems with the import they will appear in red in the status field. for example in the screen shot above the card number 1234 already exists in the current system.

you may also import card holder photos. the name of the photo must match the cardholder ID and be of the format jpg, png, bmp