



TruPortal™

IMPORT/EXPORT WIZARD USER GUIDE

Interlogix[®] TruPortal Import/Export Wizard User Guide, product version 1.72.xxx. This guide is item number 460807001F, March 7, 2013.

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Version

This document applies to TruPortal version 1.72.xxx.

Certification



FCC compliance

This device complies with part 15 of the FCC Rules. Operation is subject to the following two conditions: (1) This device may not cause harmful interference, and (2) this device must accept any interference received, including interference that may cause undesired operation.

Class A: This equipment has been tested and found to comply with the limits for a Class A digital device, pursuant to part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference when the equipment is operated in a commercial environment. This equipment generates, uses, and can radiate radio frequency energy and, if not installed and used in accordance with the instruction manual, may cause harmful interference to radio communications. Operation of this equipment in a residential area is likely to cause harmful interference in which case the user will be required to correct the interference at his own expense.

Class B: This equipment has been tested and found to comply with the limits for a Class B digital device, pursuant to part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference in a residential installation. This equipment generates, uses, and can radiate radio frequency energy and, if not installed and used in accordance with the instructions, may cause harmful interference to radio communications.

There is no guarantee that interference will not occur in a particular installation. If this equipment does cause harmful interference to radio or television reception, which can be determined by turning the equipment off and on, the user is encouraged to try to correct the interference by one or more of the following measures:

- Reorient or relocate the receiving antenna.

- Increase the separation between the equipment and receiver.
- Connect the equipment into an outlet on a circuit different from that to which the receiver is connected.
- Consult the dealer or an experienced radio/TV technician for help.

ACMA compliance

Notice! This is a Class A product. In a domestic environment this product may cause radio interference in which case the user may be required to take adequate measures.

Canada

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This document describes how to use the TruPortal Import/Export Wizard to:

- Import persons and credentials data from an existing database (for example, a human resources system or another access control system) in Comma Separated Values (CSV) format.
- Export persons and credentials data in CSV format.
- Delete persons and credentials data in batch mode.
- Export events that provide an historical record of activity, as tracked by TruPortal.

Note: The Import/Export Wizard is not compatible with Microsoft® Windows® XP.

Conventions Used in this Documentation

The text in this manual is formatted to make it easy to identify what is being described.

- Where a term is defined, the word is represented in *italics*.
- Field names are shown in **bold**.
- Menus and menu choices are shown in ***bold italics***. All menu choices have accelerator keys, that can be used to select the menu choices using the keyboard. The underlined letter represents the accelerator key for that menu item. Accelerator keys are written, for example, <Alt>, <C>.
- Keyboard keys are represented in angle brackets. For example: <Tab>, <Ctrl>.
- Keyboard key combinations are written in two ways:
 - <Ctrl> + <Z> means hold down the first key and press the second
 - <Alt>, <C> means press the first key, then press the second
- Buttons on the screen are represented in square brackets; for example: [Modify], [Cancel].

This chapter describes the different ways that the Import/Export Wizard can be used.

Topics in this chapter include:

- [Before You Begin](#) on page 4
- [Importing, Adding, or Updating Persons or Credentials](#) on page 6
- [Exporting Persons and Credentials](#) on page 8
- [Exporting Events](#) on page 9
- [Deleting Persons or Credentials](#) on page 10

Before You Begin

Before using the Import/Export Wizard, review the following section to learn more about how ways that this tool can be used, as well as issues to consider.

Sample Scenarios

Following are some examples that illustrate the different ways the Import/Export Wizard can be used:

Providing Access for Training Class Attendees. If a class of students is coming to a facility for professional training, they would need access for the time they are on site, but once they have completed the training should no longer have access. This can be accommodated by using a CSV file to add the students to the database, and later remove them from the database.

Synchronizing with Other Databases. Since the System allows users to define several user fields to be associated with each persons record, it is likely that some of the data in those fields would also exist in other databases in an organization, such as payroll or human resources. For example, if an e-mail address and phone number is added for each persons record to enable a security guard to notify employees of visitors waiting to be escorted, then those fields would need to be updated periodically as the company directory changes. If personnel records are exported from the company directory database in CSV format, that file can be used to quickly update the appropriate fields in the System.

Batch Editing. A company has just changed its internet domain name from “theircompany.com” to “ourcompany.com” and a large database of employees exists, all with the old domain name in their e-mail addresses. An easy way to fix this is to export the persons records to a CSV file, perform a find-and-replace operation using a tool such as Microsoft Excel to search the whole CSV file, and replace the old domain name with the new one automatically. After saving the CSV file, use the Import/Export Wizard to update the records in the System with the updated CSV file.

Managing Multiple Security Systems at Different Sites. If facilities include buildings at different geographic locations, such as on opposite sides of a city, each would have its own access control system. To simplify the task of keeping them synchronized as employees and credentials change, a CSV file could be exported from the System at the main site and imported that to the System at each auxiliary site.

Giving Persons Records a Unique Identifier

Persons records in the database can have user-defined fields associated with them that can be used to enter personal data about individuals, such as vehicle license plate numbers or telephone numbers.

Every database must have a way to identify one record from another. Since some names are very common, using employee surnames as a unique database record identifier will not work. For this reason, organizations frequently assign each employee or member a unique identification number.

IMPORTANT: For best results, use a persons record identifier, such as an employee number, that is unique to each person in the organization. Without a way to identify each record as unique, then updates, imports, exports and other database maintenance actions may result in changes being made to the wrong record.

Using Unique Fields

The Import Add/Update Persons and Credentials, Delete Persons, and Delete Credentials options that are available on the Operation page of the Import/Export Wizard all have a **Unique** check box on the **Layout** page. Selecting this check box designates the associated database field as unique for purposes of searching and matching records when making updates, additions, and deletions.

The unique field is limited to those default and user-defined fields associated with a Persons record (that is, not those fields associated with either a user account or credential ID). The unique field is used to search the database for records matching those in the CSV file. If a matching record is found, it is updated with the values in the CSV file. If a matching record is not found, then a new person is added to the database. If more than one persons record has the same value in the field marked as unique, then the first record found will be updated or deleted.

Precautions When Using CSV Files to Share Data

A CSV file is a plain text file in which each line represents a row in a table, and the commas in each row indicate the columns. As shown below, the first row of the file is the key containing the field labels for the data in the file:

```
First Name,Middle Name,Last Name,Picture,Person ID
```

```
"Fredegar", "", "Bolger", "", "1003"
```

Some computer operating systems will assign a spreadsheet application as the default editor for CSV files. Since spreadsheets are designed for mathematical processing, many spreadsheets treat numbers in a CSV file as integers, instead of as text, and will remove any leading zeros.

This poses a problem if numeric data is used, such as a United States Social Security Number, as a Unique Field for persons records. Many Social Security Numbers begin with a zero. The System will treat such an all-numeric datum as text, but a spreadsheet will treat a Social Security Number as an integer (if it is typed without the dashes) and remove any leading zeros. For example, Microsoft Excel will remove the leading zero from the Social Security Number 012345678, but will not change the Social Security Number 012-34-5678 because of the dashes.

IMPORTANT: If leading zeros are used in all-numeric unique identifiers, such as person IDs, be sure not to edit a CSV file in a spreadsheet or other program used for processing or analyzing numeric data. If the spreadsheet strips the leading zeros from those entries that have them, then when the data is imported to the System, the unique identifier will not match and the application will insert that persons record as a new entry in the database instead of updating the existing entry, leading to duplication.

Importing, Adding, or Updating Persons or Credentials

The Import/Export Wizard can be used to quickly import an existing database (such as from human resources or another access control system) to a new installation. The Import Wizard will update existing persons records in the System with data from the CSV file.

The Import/Export Wizard can also be used to perform batch operations, such as adding new staff or updating multiple existing persons records, which saves time as compared to updating records individually.

Import Persons and Credentials from a CSV File

The Import/Export Wizard can be used to map the fields of a CSV file to the System database table, and import the persons and credentials.

Note the following details about importing persons and credentials:

- A persons record consists of user-defined fields for personal information, credentials (badge ID, PIN, and access level), and optional user account information to allow users to log in to the System.
- Import and export of user account data is not supported.
- Only user-defined personal data and credential data can be imported and exported.
- At a minimum, either the First Name or Last Name data field is required.
- The Credential ID data field is only required if credential fields are included in the layout.
- If a person listed in the CSV file already exists in the database, then the Import Wizard will update the existing persons record with the data from the CSV file.
- Check to ensure that CSV records are properly formatted before importing them, and then review records in the User Interface after importing them. The Import/Export Wizard will detect many CSV formatting errors, but not all.
- The Import/Export Wizard exports records on a per credential basis. For records that only include the person fields, users with multiple credentials may appear as duplicate records.

To import persons and credentials from a CSV file:

1. Insert the product disc in the client workstation's CD/DVD drive.
Alternately, if the disc image was downloaded and extracted to the client workstation's hard drive, open Windows Explorer, navigate to the disc image on the hard drive, and double-click the **start.hta** application to launch the Utilities software.
2. When the Utilities page appears, click **Import/Export Wizard**.
3. Select a **Language**, and then click [Next].
4. Type the **Panel IP Address**.
5. Type the Administrator's **User Name** and **Password**, and then click [Next].
6. Select **Import Add/Update Person and Credentials**, and then click [Next].
7. For each field in the CSV file:
 - a. Click [Add].
 - b. Type the field name, exactly as it appears in the CSV file, in the **Import Field**.
 - c. If the field in the CSV file does not have a corresponding field in the database or if the field should not be included in the import or update, select "[Blank]," otherwise select the appropriate field.

IMPORTANT: If the CSV file was exported from another database application, such as personnel records, it very likely contains fields which are not included in the System database. However, the Import/Export Wizard reads each field in the CSV file in sequence, left to right. Therefore, if a field in the CSV file does not have a corresponding field in the database, it must be mapped to “[Blank].”

8. Select a **Unique** field.

It is highly recommended that something that is unique to each person be used, such as an employee number, for the unique field. The Credential ID field is selected as unique by default, and cannot be changed. However, since persons in the System database do not need to have a credential (they may just have a user account for remote access to the System), an additional unique field is recommended.

9. (Optional) Click [Save] to save the import layout as a template.

- a. Type a descriptive **File name**.
- b. Choose a path for the import template.
- c. Click [Save].

10. (Optional) Change the default **Date Format**.

11. (Optional) Change the **Delimiter Character**.

12. Be sure **Include Header** is checked.

The header row in a CSV file provides the labels (descriptions) of each field (column). This option should only be cleared if the header row is not needed.

13. Click [Next].

14. In the **Photo Path** field, browse to and select the \Photos folder, if photos are being imported.

Note: Photos must be less than 200 KB or 1.6 megapixels.

15. In the **Data File** field, browse to and select the CSV file.

16. Click [Execute].

The Import/Export Wizard will import data and display a summary of the records processed, records imported, etc.

17. Click [Finish] to close the Import/Export Wizard.

Exporting Persons and Credentials

The Import/Export Wizard can be used to extract personnel data (i.e., the user-defined fields in a persons record) and credentials from the System to a CSV file.

Note: User account information, which allows a person to log into the System, is not exported by the Import/Export Wizard.

Export Persons and Credentials to a CSV File

Use the Export Wizard to write some or all of the user-defined fields and credentials in the database to a CSV file, which can then be used to edit the records or import the data to other databases such as personnel records.

1. Insert the product disc in the client workstation's CD/DVD drive.
Alternately, if the disc image was downloaded and extracted to the client workstation's hard drive, open Windows Explorer, navigate to the disc image on the hard drive, and double-click the **start.hta** application to launch the Utilities software.
2. When the Utilities page appears, click **Import/Export Wizard**.
3. Select a **Language**, and then click [Next]
4. Type the **Panel IP Address**.
5. Type the Administrator's **User Name** and **Password**, and then click [Next].
6. Select **Export Persons and Credentials**, and then click [Next].
7. For each field that should be exported to the CSV file:
 - a. Click [Add].
 - b. Select the field.
Do this in order. Do not add "PIN" in Order 1 then "Last Name" in Order 2.
The name of the field is automatically added to the corresponding **Export Field**.
To rename the field in the CSV file, delete the name from the **Export Field** and type the desired name.
8. (Optional) Click [Save] to save the export layout as a template.
 - a. Type a descriptive **File name**.
 - b. Choose a path for the export template.
 - c. Click [Save].
9. (Optional) Change the default **Date Format**.
10. (Optional) Change the **Delimiter Character**.
11. Be sure **Include Header** is checked.
The header row in a CSV file provides the labels (descriptions) of each field (column). This option should only be cleared if the header row is not needed.
12. Click [Next].
13. (Optional) In the **Photo Path** field, browse to and change the folder for exported photos.
14. (Optional) In the **Data File** field, browse to and change the file name and path for the CSV file.
15. Click [Execute].
16. Click [Finish].

Exporting Events

The Import/Export Wizard can be used to export events that provide an historical record of activity tracked by the System, including:

- Individuals that were granted or denied access,
- Anti-passback violations,
- Users that logged into the System,
- System and device status messages, and
- Alarms, such as door tampering, doors forced open, etc.

Events can also be backed up either manually or on a schedule using the **System Administration > Backup/Restore** page in the User Interface. (See the *TruPortal Software User Guide* for details.) However, note that individual fields cannot be selected during a manual or scheduled event backup.

To export events, follow these steps:

1. Insert the product disc in the client workstation's CD/DVD drive.
Alternately, if the disc image was downloaded and extracted to the client workstation's hard drive, open Windows Explorer, navigate to the disc image on the hard drive, and double-click the **start.hta** application to launch the Utilities software.
2. When the Utilities page appears, click **Import/Export Wizard**.
3. Select a **Language**, and then click [Next].
4. Type the **Panel IP Address**.
5. Type the Administrator's **User Name** and **Password**, and then click [Next].
6. Select **Export Events**, and then click [Next].
7. For each field to be exported to the CSV file:
 - a. Click [Add].
 - b. Select the field.
Do this in order. Do not add "Event ID" in Order 1 then "Device" in Order 2.
The name of the field is automatically added to the corresponding **Export Field**.
To rename the field in the CSV file, delete the name in the **Export Field** and type the desired name.
8. Optional: click [Save] to save the export layout as a template.
 - a. Type a descriptive **File name**.
 - b. Choose a path for the export template.
 - c. Click [Save].
9. Optional: change the default **Date Format**.
10. Optional: change the **Delimiter Character**.
11. Be sure **Include Header** is checked.
The header row in a CSV file provides the labels (descriptions) of each field (column). This option should only be cleared if the header row is not needed.
12. Click [Next].
13. (Optional) In the **Data File** field, browse to and select a different name and path for the CSV file.
14. Click [Execute].
15. Click [Finish].

Deleting Persons or Credentials

The Import/Export Wizard can delete whole persons records, or remove credentials (badge IDs) from persons records. For some example scenarios, see [Before You Begin](#) on page 4.

To delete persons records, at least one unique field is needed to match the records to be deleted. The Import/Export Wizard goes through the list of records in the CSV file, and deletes each matching record in the System. For best results, the unique field should be truly unique, such as a credential ID or person ID. Choosing a field such as Last Name may produce unexpected results. If more than one record matches the unique field, the first record found will be deleted. Since last names are often common, they are not the best choice for a unique field.

Note: To delete credentials, the exact credential IDs are needed. Deleting credentials removes only the credential information, not the whole persons record.

Delete Persons

The Import/Export Wizard can use a CSV file to determine which persons records to delete. The Import/Export Wizard goes through the list of records in the CSV file, and deletes each matching record in the database.

The easiest way to get a CSV file to use as a deletion list is to export the persons and credentials from the database, since the data, unique fields and field labels will match exactly (see [Export Persons and Credentials to a CSV File](#) on page 8). Open the CSV file and remove from the CSV file the persons that should remain in the System, save the CSV file and use it for the delete process.

However, a CSV file from another database can be used, such as a human resources database. Make sure the CSV file only contains the persons to be deleted (every record in the CSV file that has a match in the System will be deleted from the System), and the records have a unique field, such as person ID or credential ID.

IMPORTANT: The Delete Persons option uses one or more unique fields (see [Using Unique Fields](#) on page 5) to match records. If a field that has more than one matching record (such as “Last Name”) in the System is selected as a **Unique Field**, then the first matching persons record found will be deleted, possibly leading to unexpected results.

To delete persons records:

1. Obtain a CSV file to use as the source for deletion. Remove all persons records except those to be deleted from the database.
2. Insert the product disc in the client workstation's CD/DVD drive.
Alternately, if the disc image was downloaded and extracted to the client workstation's hard drive, open Windows Explorer, navigate to the disc image on the hard drive, and double-click the **start.hta** application to launch the Utilities software.
3. When the Utilities page appears, click **Import/Export Wizard**.
4. Select a **Language**, and then click [Next].
5. Type the **Panel IP Address**.
6. Type the Administrator's **User Name** and **Password**.
7. Click [Next].
8. Select **Delete Persons**, and then click [Next].
9. Map the fields in the CSV file to the corresponding fields in the System:

IMPORTANT: Every field in the CSV file for a persons record does not need to be mapped for deletion. The critical fields are the Unique Fields (the field or fields that the Import/Export Wizard will use to match CSV file records to existing records). However, since the records in the CSV file are read from left to right, every field in the CSV file that precedes the **Unique Field** must be mapped.

- a. Click [Add].
 - b. Type the field name, exactly as it appears in the CSV file, in the **Import Field**.
 - c. If the field in the CSV file does not have a corresponding field in the System database or if a field should not be included, select "[Blank]" for the Field, otherwise select the appropriate Field.
10. Select a **Unique** field.
It is highly recommended that something that is unique to each person be used, such as an employee number, for the unique field. The **Credential ID** field is selected as unique by default, and cannot be changed. However, since persons in the System database do not need to have a credential (they may just have a user account for remote access to the System), an additional unique field is recommended.
 11. (Optional) Click [Save] to save the import layout as a template.
 - a. Type a descriptive **File name**.
 - b. Choose a path for the import template.
 - c. Click [Save].
 12. (Optional) Change the default **Date Format**.
 13. (Optional) Change the **Delimiter Character**.
 14. Be sure **Include Header** is checked.
The header row in a CSV file provides the labels (descriptions) of each field (column). This option should only be cleared if the header row is not needed.
 15. Click [Next].
 16. In the **Data File** field, browse to and select the CSV file to use as the source for deletion.
 17. Click [Execute].

Delete Credentials

The Import/Export Wizard can be used to delete credentials without deleting an entire persons record. To delete unused or unwanted credentials, a CSV file listing the credentials to be deleted from the System is needed.

Note: No data other than the Credential ID is required to delete credentials. However, for convenience, it is useful to have a First and Last Name, or at least a Person ID, so that as the CSV file is prepared for the deletion, the credentials to be deleted will be obvious.

1. Obtain a CSV file to use as the source for deletion. Remove all persons records except those whose credentials should be deleted from the System.
2. Insert the product disc in the client workstation's CD/DVD drive.
Alternately, if the disc image was downloaded and extracted to the client workstation's hard drive, open Windows Explorer, navigate to the disc image on the hard drive, and double-click the **start.hta** application to launch the Utilities software.
3. When the Utilities page appears, click **Import/Export Wizard**.
4. Select a **Language**, and then click [Next].
5. Type the **Panel IP Address**.
6. Type the Administrator's **User Name** and **Password**, and then click [Next].
7. Select **Delete Credentials**, and then click [Next].
8. Map the fields in the CSV file to the corresponding fields in the System:

IMPORTANT: Every field in the CSV file does not need to be mapped when deleting credentials. The critical field is the Credential ID field, which will be used to match CSV file records to the System records. However, since the records in the CSV file are read from left to right, be sure to map every field in the CSV file that precedes the credential ID.

- a. Click [Add].
- b. Type the field name, exactly as it appears in the CSV file, in the **Import Field**.
- c. If the field in the CSV file does not have a corresponding field in the System database, select "[Blank]" for the field; otherwise select the appropriate field.
9. (Optional) Click [Save] to save the import layout as a template.
 - a. Type a descriptive **File name**.
 - b. Choose a path for the import template.
 - c. Click [Save].
10. (Optional) Change the default **Date Format**.
11. (Optional) Change the **Delimiter Character**.
12. Be sure **Include Header** is checked.
The header row in a CSV file provides the labels (descriptions) of each field (column). This option should only be cleared if the header row is not needed.
13. Click [Next].
14. In the **Data File** field, browse to and select the CSV file that contains the credentials to be deleted.
15. Click [Execute].

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