

Continental Access

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ImportPersonnel Utility

REVISION – Rev A

DATE: 12/08/2014

CardAccess® 3000 



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Important Information - Must be read before installing software.

- 1) This document pertains to the ImportPersonnel.exe utility which can be found under Reports in the CardAccess3000.
- 2) The ImportPersonnel utility provides the ability to import all fields in personnel.
- 3) The ImportPersonnel utility must be launched manually every time data needs to be imported.

Scope

This document contains information regarding the ImportPersonnel utility. This utility can be found under Reports in the CardAccess 3000. The ImportPersonnel utility imports new badge records and also updates existing badge records in the CA3000 database. This utility will not delete badge records from the database. If you need to delete badge records in the database, you must write a custom .Net application utilizing the CA3000 API.

Prerequisites

- A functional CardAccess 3000 V2.8.x or later system.
- A flat file containing data in the specified file format.

Related Documents

- CaImportData Utility Guide.

ImportPersonnel Utility Overview

The ImportPersonnel utility provides the ability to import all fields in personnel. It can be launched manually from the CardAccess 3000 Reports menu or directly from the CardAccess3000>Reports3000 folder. This utility must be launched, configured and executed every time data is ready for importing.

Launching the ImportPersonnel Utility

- 1) The ImportPersonnel.exe utility is located under Reports in the CardAccess 3000 software. Refer to Figure 1.

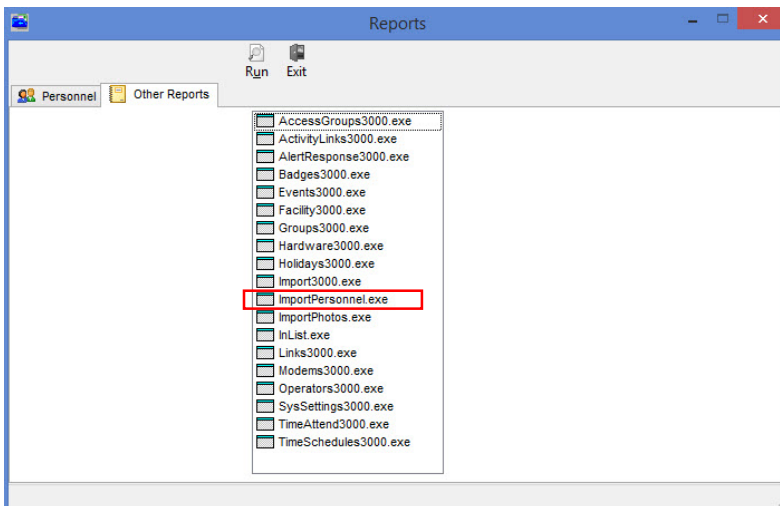


Figure 1.

- 2) This utility can also be launched from outside of the CardAccess 3000 software. You may follow the path **C:\Program Files\ CardAccess 3000\Reports3000** to locate this utility. On a 64 bit operating system, the path will be **C:\Program Files(x86)\ CardAccess 3000\Reports3000**. Refer to Figure 2.

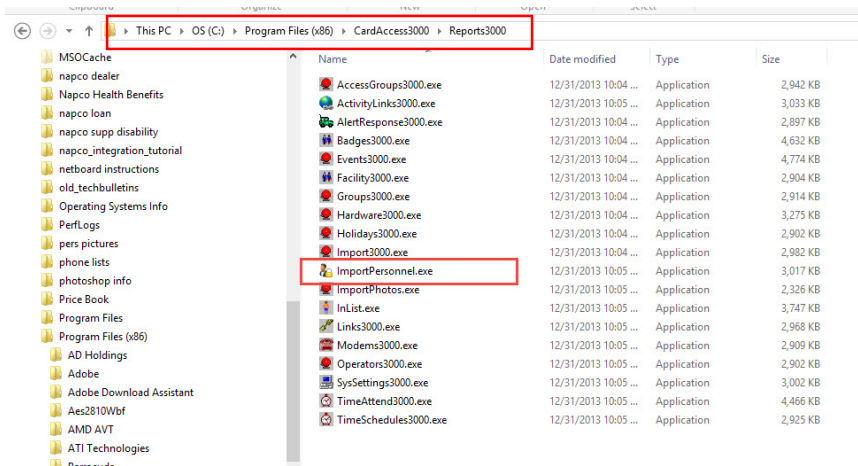


Figure 2.

- 3) After double clicking the **ImportPersonnel.exe** file to run the utility, the **Reports Login** screen will display. You must log in with the CardAccess 3000 credentials. Refer to Figure 3.

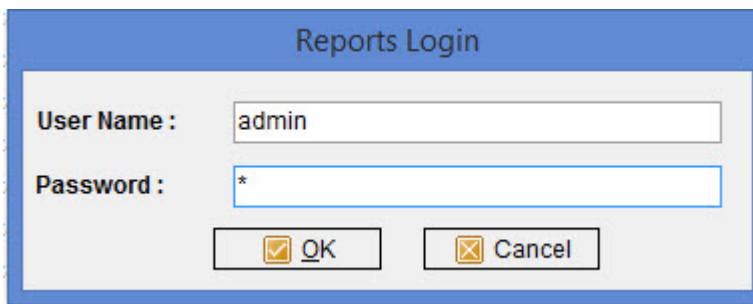


Figure 3.

- 4) After the ImportPersonnel utility is launched, the **CardAccess Import Utility** screen will display. Refer to Figure 4.

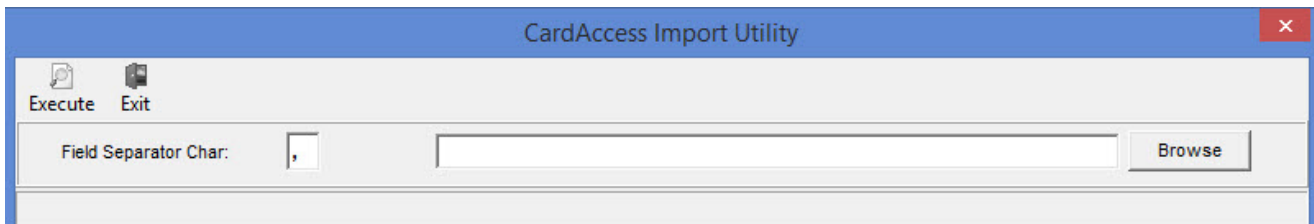


Figure 4.

- 5) Click the **Browse** button to open a **Browse To File** window. Navigate to the path of the import file and select it. Click **Open**. Refer to Figure 5.

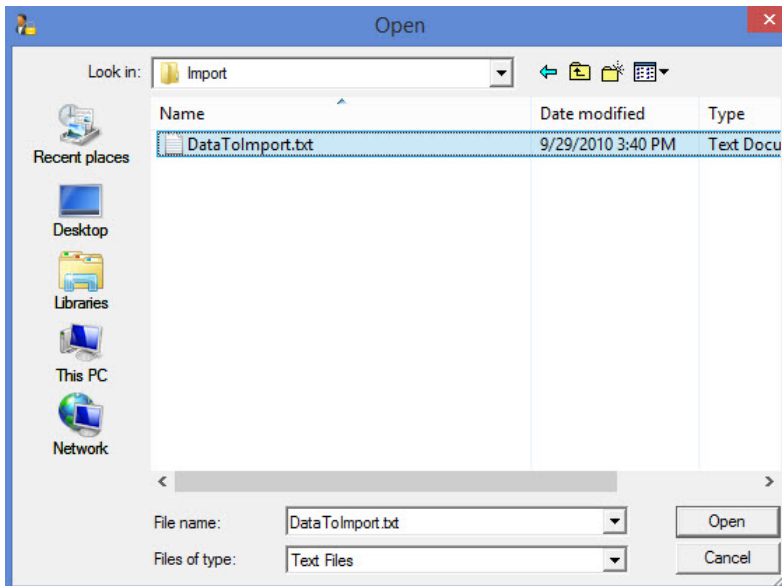


Figure 5.

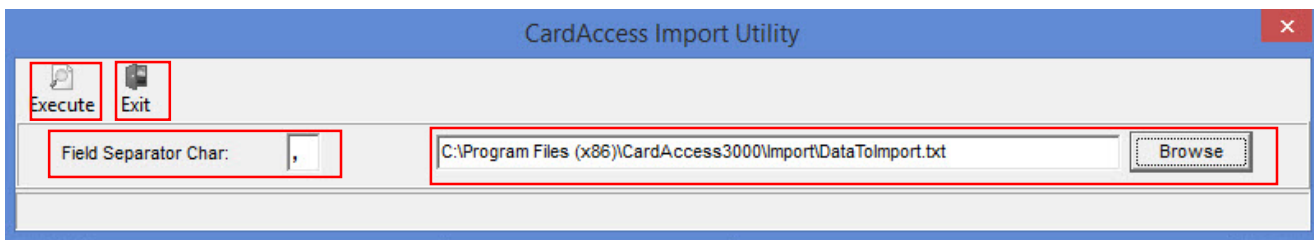


Figure 6.

- 6) The **Field Separator Character** is selectable. The default Field Separator Character is a comma. This can be changed, but in most cases, a comma is used. Refer to Figure 6.
- 7) Click **Execute** to start the data import. Refer to Figure 6.
- 8) After the import is complete, click **Exit** to close the CardAccess Import Utility. Refer to Figure 6.

ImportPersonnel File Template

- 9) There is an ImportPersonnel template file available under the CardAccess3000>Help folder. This template file will contain all the fields and their required order. Refer to Figures 7 and 8.

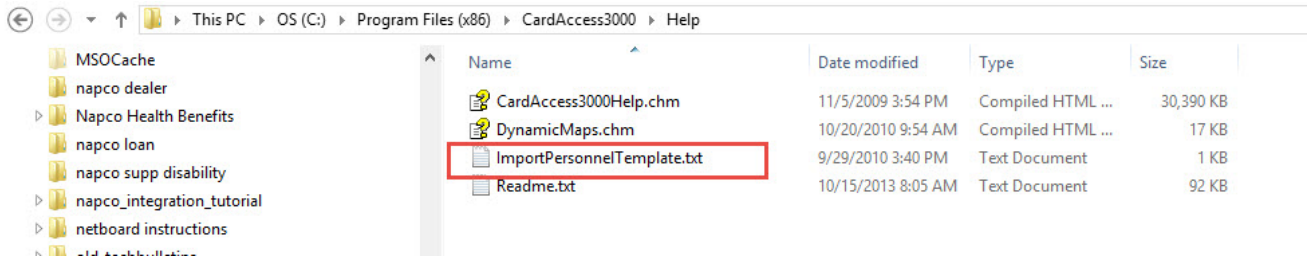


Figure 7.

Fac, Badge, LName, FName, AG1, AG2, AG3, AG4, AG5, AG6, Pin, Iss, Enab, Trk, Res, Init, DShunt, Escort, Apb, ATim, VTag, ADate, DDate, Grp, Emboss, CoID, Dept, Phone, Loc, Vehicle, Lic, Cont, CPhone, SSN, AShunt, HDate, Us1, Us2, Us3, Us4, Us5, Us6, Us7, Us8, Us9, Us10, Us11, AG1Date, AG2Date, AG3Date, AG4Date, AG5Date, AG6Date, Gender, DateofBirth, MiddleName, APBArea, HolidayCalendar, MApbExempt, Category1, Category2, Category3, Category4, Category5, Category6, Category7, Category8, Category9, Category10, Category11, Category12, Category13, Category14, Category15, Category16, AgencyCode, Series, PersonId, OrgCat, OrgId, OrgAssoc, FirstIn

Figure 8.

Import Personnel Field Information

Fac, //Facility Codes are optional - Value is 0 thru 10. (0=None)

Badge, //Badge Number Primary Key is *Fac + Badge*

LName, //Last name

FName, //First name

AG1, //Can assign up to 6 access groups. Newer versions of CA3000 will allow up to 16 AG's.

AG2,

AG3,

AG4,

AG5,

AG6,

AG7 – AG16 //These access groups are available in V2.9.91 and later.

Pin, //Pin code used with a keypad

Iss, //Issue level.- Not used on Prox cards. 0=none

Enab, //Enabled - checked when the badge is enabled.

Trk, //Tracked - normally not checked. A badge can be set to tracked for reporting purp.

Res, //Stay On Panel (Badge is resident on panel). - Checked by default.

Init, //Initial Download to Panel - Checked by default.

DShunt, //Shunt by designated reader function

Escort, //Escorted - Badge requires an escort. Not checked by default

Apb, //Used for Anti-Passback

ATim, //Used for APB Timed duration

VTag, //Badge is a vehicle Tag

ADate, //Badge Activation Date

DDate, //Badge Deactivation Date

Grp, //Group - groups are used for database partitioning and also for reporting

Emboss, //Embossed ID number printed on a magstripe card

CoID, //Company ID

Dept, //Department

Phone, //Phone number

Loc, //Location

Vehicle, //Vehicle type

Lic, //License Plate

Cont,

CPhone, //phone

SSN, //Social security number

AShunt, //Shunt by designated reader function

HDate, //Hire Date

Us1, //Custom user fields (1 to 11) - Refer to the excel file for the string sizes.

Us2,

Us3,

Us4,

Us5,

Us6,

Us7,

Us8,

Us9,

Us10,

Us11,

AG1Date, //Access Group Expiration Dates AG1 - AG6

AG2Date,

AG3Date,

AG4Date,

AG5Date,

AG6Date,

Gender, //Gender

DateofBirth, //Dob

MiddleName, //Middle name

APBArea,

HolidayCalendar, //Used when Holiday Calendars are configured.

MApbExempt,

Category1, //Categories are used for Threat Level management a counting specific events

Category2,

Category3,

Category4,

Category5,

Category6,

Category7,

Category8,

Category9,

Category10,

Category11,

Category12,

Category13,

Category14,

Category15,

Category16,

AgencyCode, //Used for piv badges

Series, //

PersonId,

OrgCat,

OrgId,

OrgAssoc,

FirstIn /Used for the first-In function

Notes:

- The template in Figure 8 is from CardAccess 3000 V2.9.88. Future versions of CardAccess 3000 will contain additional fields including 16 Access Groups.
- If a field(s) is not used, you must still include the delimiters with nothing between them.

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Import3000 Utility

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Important Information - Must be read before installing software.

- 1) This document pertains to the Import3000.exe utility which can be found under Reports in the CardAccess 3000. This utility contains an import and export function. This document will only cover only the import section of the utility.
- 2) This import utility provides the ability to import all fields in personnel.
- 3) The file format is user selectable by mapping fields in the Import3000.exe.
- 4) The Import3000 utility must be configured and launched manually.

Scope

This document contains information regarding the Import3000.exe utility. The Import3000.exe utility contains an import and export feature. This document will only cover the import feature. The export feature is rarely used in this utility. If you wish to export events, it is recommended to export events from the Events3000.exe report. The Import3000.exe utility will not delete badge records from the database. If you wish to delete badge records in the database, you must write a custom .Net application utilizing the CA3000 API.

Prerequisites

- A functional CardAccess 3000 system.
- A .csv or .txt file containing data to import.

Related Documents

- ImportPersonnel Utility Guide.
- CaImportData Utility Guide.

Import3000 Utility Overview

The **Import3000.exe** is “not” a report. It is a utility that imports personnel information into the CardAccess 3000 database. It also contains an export feature which will not be covered in this document. Personnel records can be created or updated by importing records from a 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. The Import3000.exe utility must be configured and launched manually.

Warning – The Import3000.exe 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.

Launching the Import3000.exe Utility

- 1) The **Import3000.exe** is located under **Reports**, in the CardAccess 3000 software.
- 2) To execute the **Import3000.exe** from the Reports list, double click the **Import3000.exe**. Refer to Figure 1.

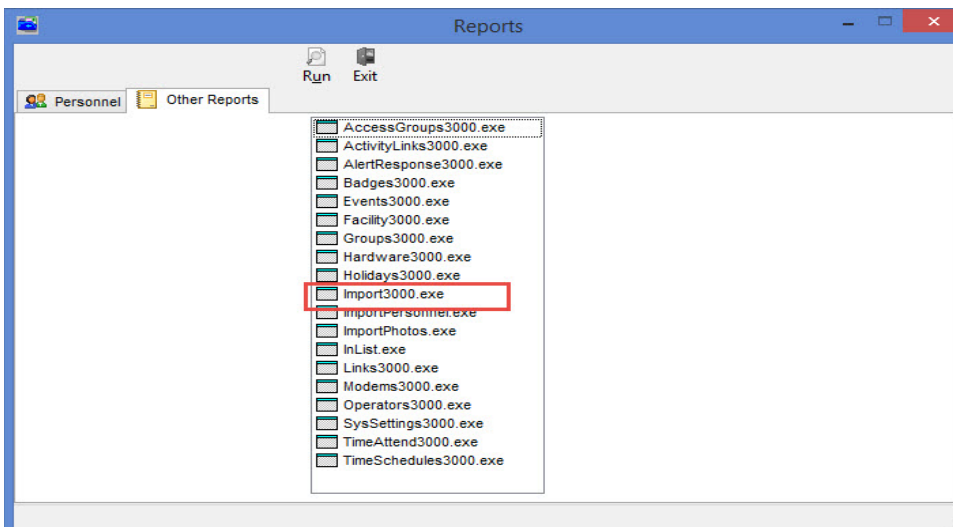


Figure 1.

- 3) After the **Import3000.exe** is launched from within CardAccess 3000, the **CardAccess Import/Export** utility screen will display. Refer to Figure 2.

Very Important: If one or more of the fields on this screen overlap, you must maximize or expand the windows size.

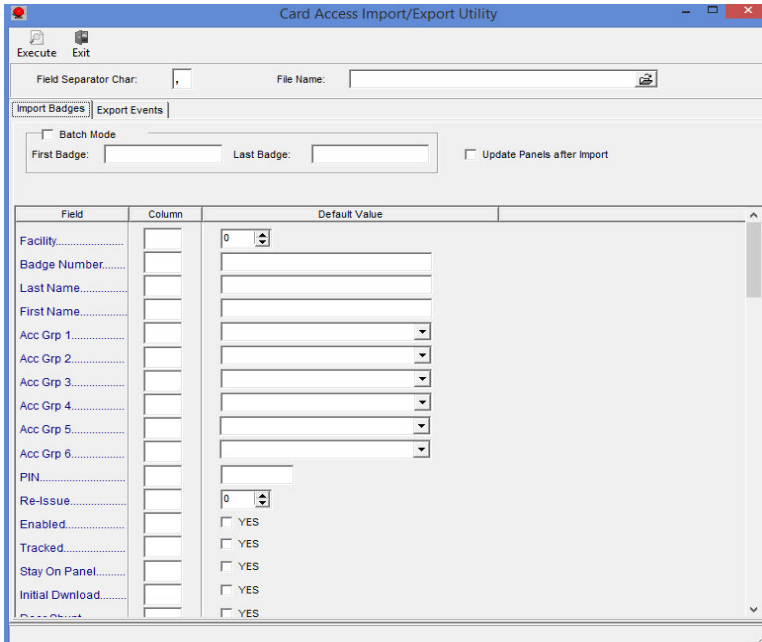


Figure 2.

- 4) This utility can also be launched directly from **Windows Explorer** under the CardAccess3000>Reports3000 folder. Refer to Figure 3.

Note: On a 32 bit OS, the path is **C:\Program Files\ CardAccess3000\Reports3000**. On a 64 bit operating system, the path is **C:\Program Files (x86)\ CardAccess3000\Reports3000**.

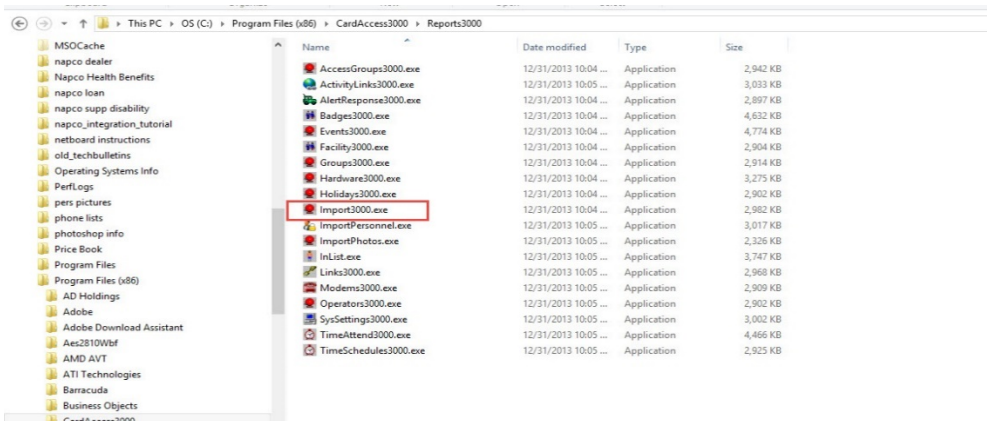


Figure 3.

- 5) After launching the **Import3000.exe** from **Windows Explorer**, a login screen will display. You must log in with the CardAccess 3000 credentials. Refer to Figure 4.

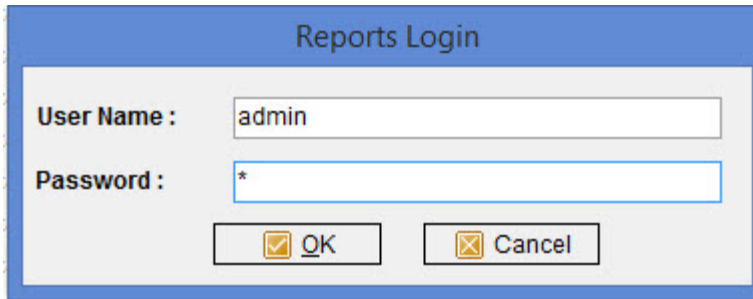


Figure 4.

Configuring the Import3000 Import/Export Utility Screen

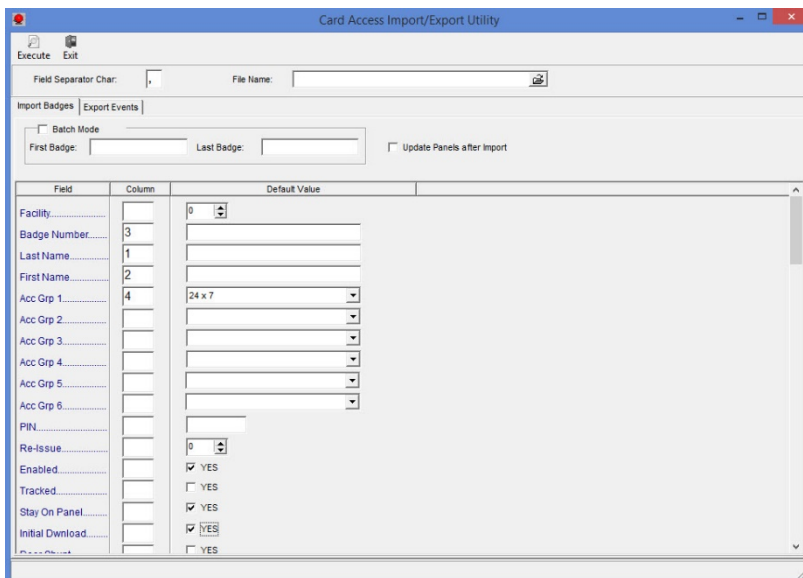


Figure 5.

- 6) After launching the **Import3000.exe**, you must configure the mapping of the fields which correspond to the fields in the import file. Refer to Figure 5 and the notes below.

Important Configuration Notes (Refer to Figure 5):

- The Column to the right is the **default value** column.
- **Facility codes** default to zero if the import file does not contain a Facility Code field.
- The **Badge Number** is a primary key and **MUST** be one of the fields in the import file.
- The **Access Groups** must be **preconfigured** in the CardAccess 3000 software.
- In most cases the **Enabled**, **Stay On Panel** and **Initial Download** should be checked by default while importing badges.

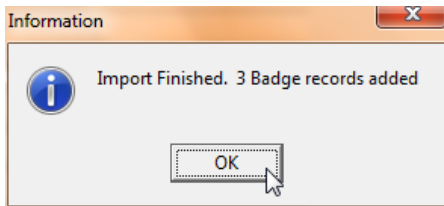


Figure 6.

- 7) After clicking Execute to import data, an **Import Finished** dialog box will display when the import is complete. Click **OK**. Refer to Figure 6.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	fowler	brian	1357	1										
2	cagney	james	1456	1										
3	johnson	bill	9321	2										
4														
5														
6														
7														
8														
9														
10														
11														
12														
13														
14														
15														
16														
17														
18														
19														
20														
21														
22														
23														
24														
25														
26														

Figure 7.

8) The file in Figure 7 is a sample import file that was created using Excel but was saved as a *.csv file format. This file contains the total of 3 records with 4 fields in each record.

Reminder: All headers must be removed from the file prior to importing the data.

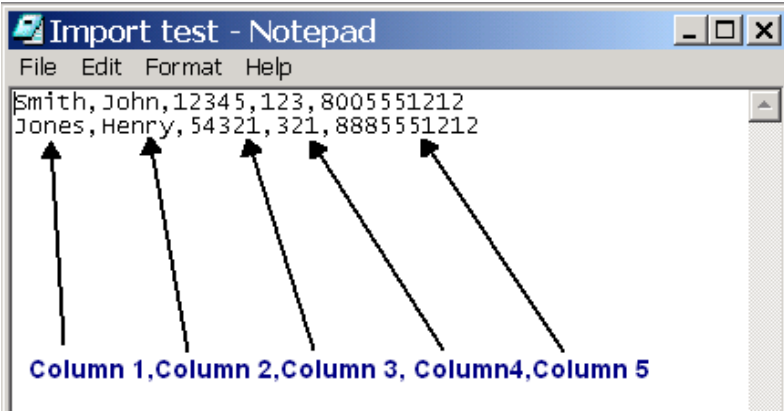


Figure 8.

9) The file in Figure 8 is an example of a text file used for importing. Each field is separated by a comma. This comma represents a column within the Import utility. This file contains a total of 2 records with five fields (columns) in each record.

Example Field Values in Import File

Field Name	Values in Import File	Comments
Facility	1 - 10	Default = 0
Access Group	0,1,2,3,4,5...	Preconfigured Access Group numbers in the CA3000
Enabled, Stay On Panel...	NO= not checked, YES = checked	
Activation Date	10/1/2014	Date Format = month/day/year

General Notes:

- The file format of the import file is user configurable by mapping the fields in the Import3000 screen.
- The import file must contain a badge number since the badge number is a primary key in the badge record. The Facility code defaults to zero if it's not specified in the import file.
- By default, the **Field Separator** is a comma. This can be changed in the Import3000.exe screen.
- The most common import file is from an Excel “.csv” file. If you are importing from an Excel “.csv” file, you must remove the headers in Excel before creating the “.csv”.
- You can use the Import3000.exe utility to create batches of badge records without using an import file. This is called the **Batch Mode**. You can set default values for selected fields and create as many contiguously numbered badges as you desire. All the badges will be created in the Personnel screen with the same default values that you selected in the Import Badges/Default Value' column. BE VERY CAREFUL USING THIS FEATURE.

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CalImportData Utility

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Important Information - Must be read before installing software.

- 1) This document pertains to the CaImportData.exe utility which can be found under the CardAccess3000>Tools folder.
- 2) This import utility is limited to eight fields of personnel data. If you require more personnel fields to import, refer to the CaImportPersonnel.exe utility.
- 3) The CaImportData utility imports in real-time and does not have to be manually launched.

Scope

This document contains information regarding the CaImportData utility. This utility executes automatically and does not have to be launched manually. The CaImportdata utility imports new badge records and also updates existing badge records in the CA3000 database. The CaImportData utility will not delete badge records from the database. If you want to delete badge records in the database, you must write a custom .Net application utilizing the CA3000 API.

Prerequisites

- A functional CardAccess 3000 V2.6.x or later system.
- A flat file containing data to import.

Related Documents

- ImportPersonnel Utility Guide.

CaImportData Utility Overview

The CaImportData utility provides a real-time import of basic personnel information into the CardAccess 3000 database. After the CaImportData utility is launched and running in the system tray, data will be imported automatically, when a flat file is detected in a predefined folder. After the data is imported, the file is automatically deleted. For the ability to import more fields, use the CaImportPersonnel.exe utility.

Very Important: After the data is imported from the flat file, the file(s) will be deleted automatically. Do not place these files on the desktop or in any other folders that contains other files and folders. This might cause an accidental deletion of the other files and folders.

Launching the CaImportData Utility

- 1) The caImportData.exe is located in the CardAccess 3000 Tools folder. You may follow the path **C:\Program Files\ CardAccess 3000\Tools** to locate this utility. On a 64 bit operating system, the path will be **C:\Program Files (x86)\ CardAccess 3000\Tools**.
- 2) After double clicking the **caImportData.exe** file to run the utility, the **Import Personnel Data Utility** icon will display in the system tray. Refer to Figure 1.
- 3) Click the icon in Figure 1 to open the **CardAccess Import Personnel Data** window. The CardAccess Import Personnel Data screen will display Refer to Figure 2.

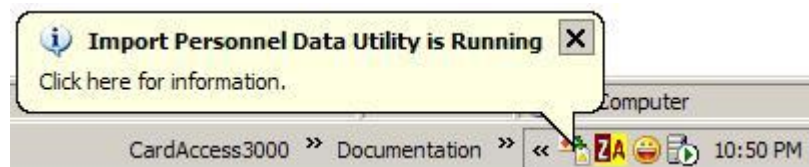


Figure 1.

4) Click the **Browse** button on the **CardAccess Import Personnel Data** window. Refer to Figure 2.

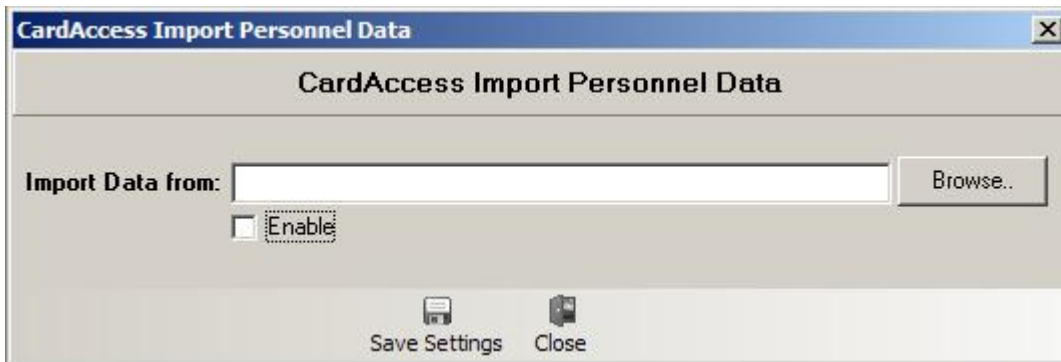


Figure 2.

5) After clicking Browse, the **Browse for Folder** Dialog box will display. Refer to Figure 3.

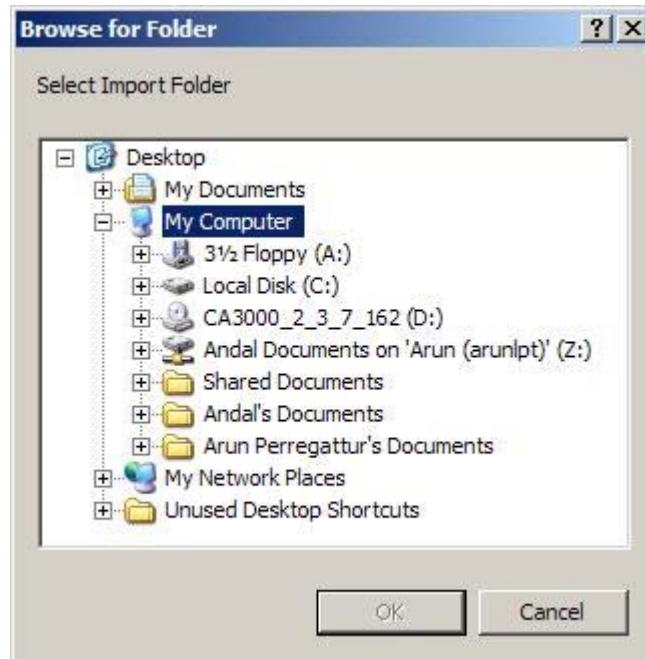


Figure 3.

- 6) Browse to the folder where the CardAccess Personnel data file has been placed. After the folder has been selected, click on **OK** button. Refer to Figure 4.

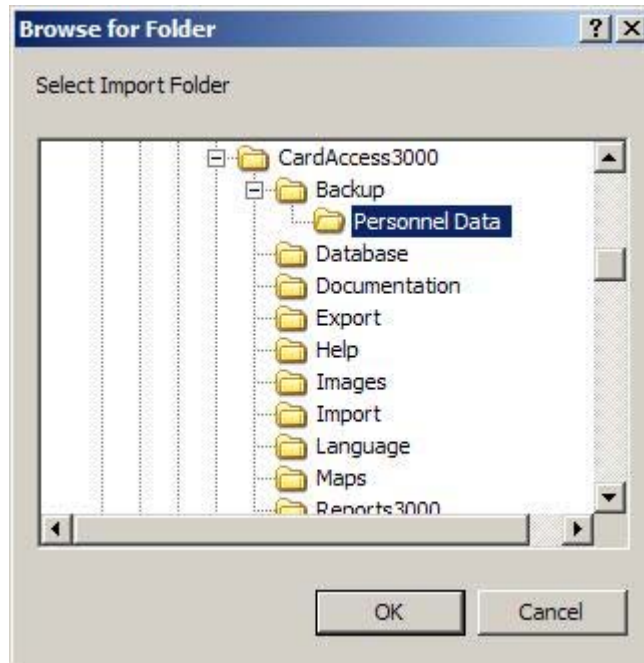


Figure 4.

- 7) After clicking OK, the **Import Data from** field will show the directory path of the selected folder. Refer to Figure 5.



Figure 5.

8) Click the **Enable** checkbox to enable the Personnel data import. Refer to Figure 6.

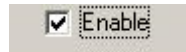


Figure 6.

9) Click on **Save Settings** button at the bottom of the window to save the settings. Refer to Figure 7.

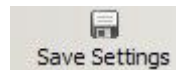


Figure 7.

10) On clicking the button, you will see the message box below. Refer to Figure 8.

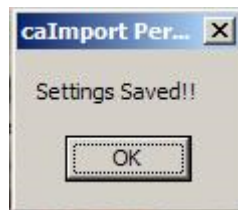


Figure 8.

11) Click the **OK** button in the message box. Refer to Figure 8.



Figure 9.

12) Click the **Close** button found at the bottom to close the window. Refer to Figure 9.

13) After all the settings are configured and saved, the CardAccess Personnel data will be imported from the specified location. The specified folder must contain a .txt file which contains the data. The fields must be separated by a “|” symbol.

CaImportData File Format

File Layout:

Field Name	Data Type	Length	Field	Start	End
BADGENO	character	20	1	1	20
FACILITY	Integer	5	2	22	26
LNAME	character	15	3	28	42
FNAME	character	15	4	44	58
MI	character	1	5	60	60
EMPNO (SS#)	character	10	6	62	71
AG1	Integer	4	7	73	76
AG2	Integer	4	8	78	81

Notes:

- All fields are separated by a delimiter equal to “|”. The delimiter is not required at the start of the record, but is required at the end of the record. Character indicates alphanumeric and integer indicates binary representation. The length value is the max length of the field. The field can be less characters.
- The import will be done in real time. If there is a .txt file in the folder you select, it will import the records in the .txt file and then delete the file. The Caimportdata.exe must be running in the system tray for this to work.
- You can have multiple .txt files in the selected folder. All records in the .txt files will be imported and then the file(s) will be deleted.

File Format Notes and Examples

- 1) Below are the field names of the eight columns in the import file. The import data must not contain the field names.

|Badge|Facility|LName|FName|MI|EMPNO|AG1|AG2|

Note: The access groups must be preconfigured in the CardAccess 3000 prior to specifying and importing them in the import file.

- 2) Below is an example of a few records in a sample import .txt file:

```
1324|1|Jones|Peter|S|987712654|1|0  
1750|2|Smith|Lucy|J|044323456|2|0
```

- 3) If a field(s) is not used, you must still include the delimiters with nothing between them. Below is an example of a record in the import .txt file where the facility field and Employee number is not used:

```
1324| |Jones|Peter|S| |1|0
```

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CaExportData Utility

(Used to Export Time and Attendance Data out of the CardAccess3000)

REVISION – Rev A

DATE: 12/08/2014

CardAccess® 3000 



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Important Information - Must be read before installing software.

- 1) This document pertains to the CaExportData.exe utility which can be found under the CardAccess3000>Tools folder.
- 2) The CaExportData utility is used to export Time and Attendance data out of the CardAccess 3000 software.
- 3) The CaExportData utility exports in real-time after the CaExportData.exe utility is launched and running in the system tray.

Scope

This document contains information regarding the CaExportData utility. This utility can be found under the CardAccess 3000>Tools folder. The CaExportData utility exports Time and Attendance information from the CardAccess 3000 into a flat file. The data in the flat file can then be retrieved via a third party application.

Prerequisites

- A functional CardAccess 3000 V2.6.x or later system.

Related Documents

- CaImportData Utility Guide

CaExportData Utility Overview

The CaExportData utility provides the ability to export Time and Attendance information from the CardAccess 3000 database into a flat file at a predefined location.

Launching the CaExportData Utility

- 1) The CaExportData.exe is located in the CardAccess Tools folder. You may follow the path **C:\Program Files\ CardAccess 3000\Tools** to locate this utility. On a 64 bit operating system, the path will be **C:\Program Files (x86)\ CardAccess 3000\Tools**.
- 2) After double clicking the **caExportData.exe** file to run the utility, the **CaExportData Utility** icon will display in the system tray. Refer to Figure 1.

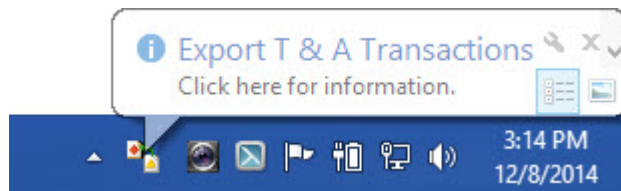


Figure 1.

Configuring the CaExportData Utility

- 3) Right click the icon and click Configure. Refer to Figure 2.

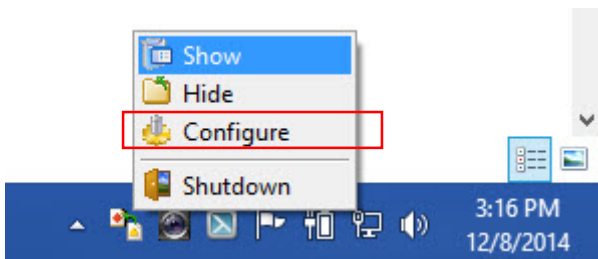


Figure 2.

4) After selecting **Configure**, the **CardAccess T&A Export Configuration** screen displays. Refer to Figure 3.

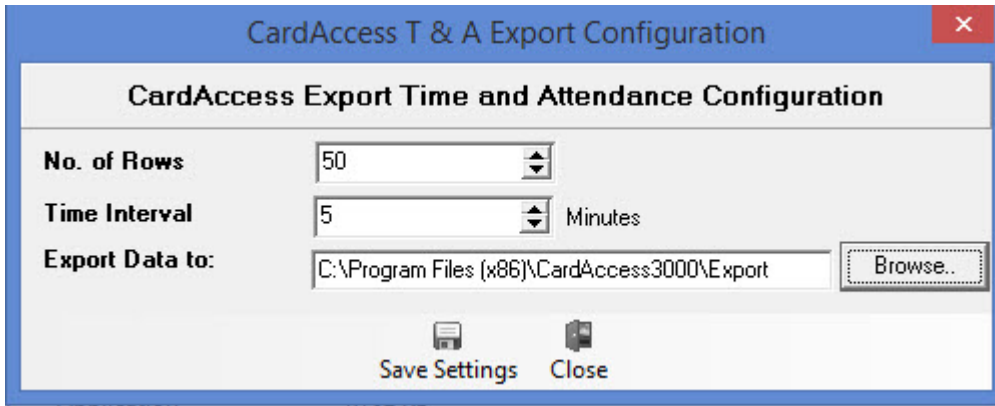


Figure 3.

5) Configure the following settings:

- **No. of Rows** – Number of rows in file.
- **Time Interval**- How often the export is performed.
- **Export Data to:** The Path of the export file.

6) Click on **Save Settings** button at the bottom of the window to save the settings. Refer to Figure 3

CaExportData File Format

The CAExportData utility will export Time and Attendance Transactions to a flat file.

File Layout:

Field Name	format	Length	Start	End
Date	yyyymmdd	8	1	8
Time	hhmmss	6	9	14
Reader ID	Range 0000-9999	4	15	23
Payroll Type	H=Hourly (other values will be ignored)	1	24	24
Facility Code	Range 00000-99999	5	25	29
Badge Number	Range 00000-99999	5	30	34
Social Security Number	Numeric	9	35	43
Transaction Sense	I=In, O=Out, N=Neutral	1	44	44

NOTE: Only Date, Time, Reader ID, Facility Code, Badge Number and Transaction Sense will be exported.