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# Basic Import Utility User Guide

B.A.S.I.S. ET694™

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**IMPORTANT:** The Import utility only works with SQL Server or SQL Server Express.

The Import Utility is a 32-bit Windows application used to import ASCII delimited text files into the Access Control and ID CredentialCenter badging system. This import utility only supports the addition of new records. No update or delete capabilities are provided. If any records already exist with the same social security number (if used), then the duplicate record will be skipped and not imported.

**IMPORTANT:** This utility is currently designed to import ASCII delimited files to a Microsoft SQL Server or Microsoft SQL Server Express database using ODBC.

**Notes:** This utility is for import only! There are no update or delete capabilities whatsoever. If a social security or badge ID already exists in the database, that row in the import file is skipped and NOT imported, leaving that record unchanged.

The import utility requires that all the columns in the ASCII file be present even if they are to be left blank.

The client's ASCII delimited file must follow the sample ASCII delimited file (**sample.txt**) EXACTLY! Almost all the data columns can be blank. (For more information, refer to [Required Fields](#) on page 6.) However, the data must be in the order as described by the header in the sample ASCII delimited file.

Some data columns *cannot* be blank - namely the **Last Name** data column. If any badge information is provided (i.e. badge ID), they must provide a **Badge Type**. Keep in mind that if badge information is provided, it is recommended that the **Activate**, **Deactivate**, and **Status** columns are also provided. However, if these are blank but **Badge Type** is not, the default values for **Activate**, **Deactivate**, and **Status** are 01/01/1997, 01/01/2002, and Active, respectively.

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## Formatting Your Import File

The Import Utility imports an ASCII delimited file into the B.A.S.I.S. database. The import utility accepts only one import file format.

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Your Import Utility installation directory contains a sample ASCII delimited file, **sample.txt**. By default, this is located in the **DataX** directory of the B.A.S.I.S. installation path (**C:\Program Files\B.A.S.I.S.\DataX**). The **sample.txt** file contains all of the fields that are imported into the database.

**IMPORTANT:** To import data into custom fields you must use DataExchange.

You will notice from the **sample.txt** file that an ASCII delimited file is simply an ASCII (text) file, each row of which contains an employee record with badge and access level information. Individual fields, such as **First Name**, **Last Name**, etc., are separated by a delimiter; hence the term “ASCII delimited.” In the **sample.txt** file, the delimiter is a vertical bar character (|).

The format of your import file must match that of the **sample.txt** file EXACTLY. Specifically, you cannot change the order in which the fields are listed. However, just about any character can be used as the delimiter. You can specify the delimiter from within the utility before importing the file. If, for example, the “|” character is contained in one of your data fields, you must avoid using “|” as your delimiter and choose another one. The delimiter you choose MUST NOT appear anywhere in the data portion being imported.

The first row in the **sample.txt** file contains the field headings. This indicates the order in which the fields are to be placed. You can import and view **sample.txt** in Microsoft Excel and use the file as a template to easily format your own data.

Fields that you do not use or wish to ignore can simply be left blank (except required fields). However, you must still separate the fields using the delimiter character. Delimiters are the only way the Import Utility can distinguish one field from another piece of information.

For example, in **sample.txt**, notice that in the second row (i.e., Maria Arquette’s record) the phone number (homephone) is represented by |425-6532|. If you did not have a phone number for her, nothing would appear between the delimiter characters, but they would still need to be maintained. Therefore, if the homephone was unavailable the entry would be represented as ||.

## Required Fields

Certain columns in the ASCII delimited import file are required. They are:

- Last Name
- Badge ID (unless using auto-increment file **StdSQLAutoBadgeID.xdf**)
- Badge Type (name of badge type, i.e., Marketing, Engineering, Visitor, etc.)

**Note:** If you do not have any badge information, then leave all badge fields blank and no badge record will be associated with the cardholder information.

- Badge Activation date will default to 01/01/1997 if left blank and badge information is entered.
- Badge Deactivation date will default to 01/01/2002 if left blank and badge information is entered.
- **Badge Status** will default to Active if left blank and badge information is entered.

## Running the Import Utility

**IMPORTANT:** Before you run the Import Utility, you must have already installed B.A.S.I.S. software and confirmed that the software is running. Do not run the Import Utility until your other B.A.S.I.S. software is installed and functioning properly!

- **WARNING!** • If your system is segmented, you cannot import badges with access levels that do not exist. The access levels must already be entered into the system using the System Administration application.

During the import process, make sure that none of the workstations on your network adds, modifies, or deletes cardholder records or access levels!

To run the Import Utility:

1. In Windows, start the B.A.S.I.S. Import Utility.  
For more information, refer to “Using B.A.S.I.S. on Supported Operating Systems” in the Installation Guide.
2. You must have the ODBC driver installed on this workstation before continuing. Check with your system administrator to confirm that you have an ODBC data source to the B.A.S.I.S. database.
3. From the *File* menu, select *Open*. Navigate to the **DataX** directory of the B.A.S.I.S. installation path (C:\Program Files\B.A.S.I.S.\DataX by default) and select the appropriate XDF import definition file based on the following criteria:
  - Use **StdSQLAutoBadgeID.xdf** if you are using system assigned, auto-incrementing badge ids
  - Use **StdSQLManualBadgeID.xdf** if the ASCII import file contains the badge ID values

**Note:** If you do not know how your system assigns badge IDs, you can check by selecting the *Administration > Cardholder Options* menu option in the ID CredentialCenter application. Click the Badge ID Allocation tab. The value in the **Generate Badge ID** field is how the badge IDs are assigned.

The following table summarizes the import definition file choices:

### Import File Definition Choices

Database	System assigned auto-incrementing badge ID	User assigned badge ID
SQL Server or SQL Server Express	StdSQLAutoBadgeID.xdf	StdSQLManualBadgeID.xdf

**Note:** The name of the XDF file you have loaded is displayed in the title bar.

4. In the Source Database/File section:
  - a. In the **Source Type** field, verify that “Text File” is selected.
  - b. Select whether the first row in the file you are importing has a header.
    - Select the **First Row Header** check box if the file does have a header. The **sample.txt** file is an example of a file with a header; the first row contains column headings that you would not wish to import as a record.
    - Do not select the **First Row Header** check box if the first line of the file contains data you wish to have imported as a record.
  - c. If your ASCII delimited file uses a different delimiter other than what is displayed in the **Delimiter** field, change the delimiter value to what your import file is using.

**Note:** Please note that the drop-down box in front of the **Delimiter** field contains some standard delimiters. If yours is not in the list, select **Other** from the list and enter your

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character in the box next to the drop down list. For example, if you were to import from the sample file you would select **Other** and specify |.

- d. Make sure that the **File name** field contains the full pathname to your ASCII delimited import file. If it is not, you can click on the folder icon to select the file.
5. In the Destination Database/File section:
    - a. Make sure that the **Destination Type** field has “ODBC” selected.
    - b. The **Connect** field should contain the appropriate ODBC connect string. You can use the default ODBC connect string that is automatically entered for you unless you have changed the password to SQL Server or your ODBC data source name is not BEST. Make the necessary changes to the connect string if your password or ODBC data source name is not BEST.
    - c. In the **ODBC Data Source To Use** field, enter the name of the 32-bit ODBC data source name (DSN) that is accessing the access control system database in the ODBC. If you are not sure what your DSN is, you can use the Configuration Editor to check.
  6. Click the [Exchange Data] button.
  7. The Data XChange dialog should appear.
  8. Click the [Start] button to begin importing data. A dialog appears warning that you should have valid data before importing.
  9. Click [Yes] at the dialog that warns you to have valid data before continuing with the import.
  10. The progress meters should begin moving and importing your data.
  11. When the meters reach 100%, the import is complete. Click [Close].
  12. If you made any changes to the Destination Database/File or Source Database/File sections, and you wish to save them so you can reuse the settings, click the **File > Save** menu option. The Select File name dialog opens, and you can specify a new file name for your modified .XDF definition file.
  13. When you are ready to exit, simply click the **File > Exit** menu option and click [Yes] at the confirmation prompt.

## Pitfalls

- Do NOT have multiple access levels with the same access level on a single import row.
- Make sure that no workstation on your network adds, modifies, or deletes cardholder records or access levels during the import process!
- Any data contained in a drop-down list field is automatically added to the choices contained in that list, if it is not already in the B.A.S.I.S. database. These refer to such items as the “dept” (i.e., department) and “loc” (i.e., location) fields. For this reason, a misspelling in your data is a serious hazard to your database integrity. Suppose, for example, that B.A.S.I.S. currently has a department named “Engineering”, and that your import file includes 100 records that each have “Enginering” (missing an “e”) in the “dept” field. The misspelled “Enginering” will be added to the list of choices in the software for department, and all of the 100 records will have the incorrect choice selected. You will then need to manually change each of the 100 records to fix the problem!
- If you receive an error [0] when attempting to open the ODBC connection to import photos, you are probably using the wrong **LNLCTL.DLL**. This was probably loaded by the imaging software.

**IMPORTANT:** Do not run the imaging software until the import is complete.



### Information for Advanced Users

- To enable the [Field Links] button, place a “-c” option on the command line. In the Import Module application, this button is displayed by selecting *Options > Access Field Links*.
- To specify a particular data exchange file from the command line, insert the “-f” parameter followed immediately by the full pathname of the XDF file.
- To bypass the initial main window containing the data definition source/destination information, insert the “-z” parameter on the command line.



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6161 East 75th Street  
Indianapolis, IN 46250  
Phone: (317) 849-2250



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