AxiomV™ Card Import Wizard

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RBH
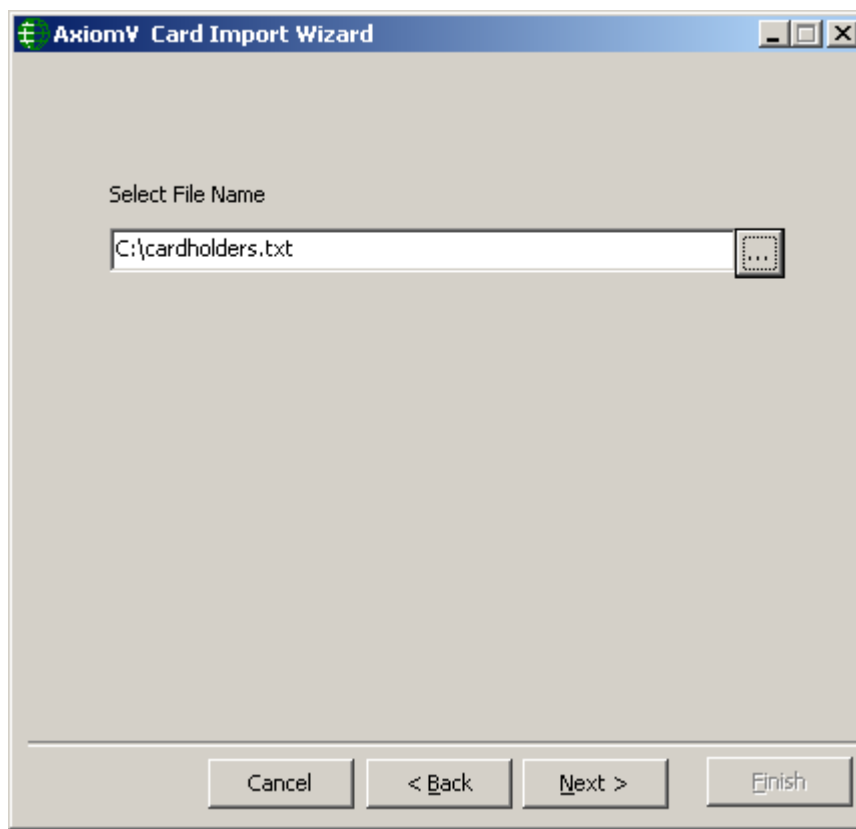ACCESS
TECHNOLOGIES
INC.

Contents

AxiomV™ Card Import Wizard is used to import cardholder information from other sources into AxiomV™. A registered <u>license</u> is required for this utility to work.
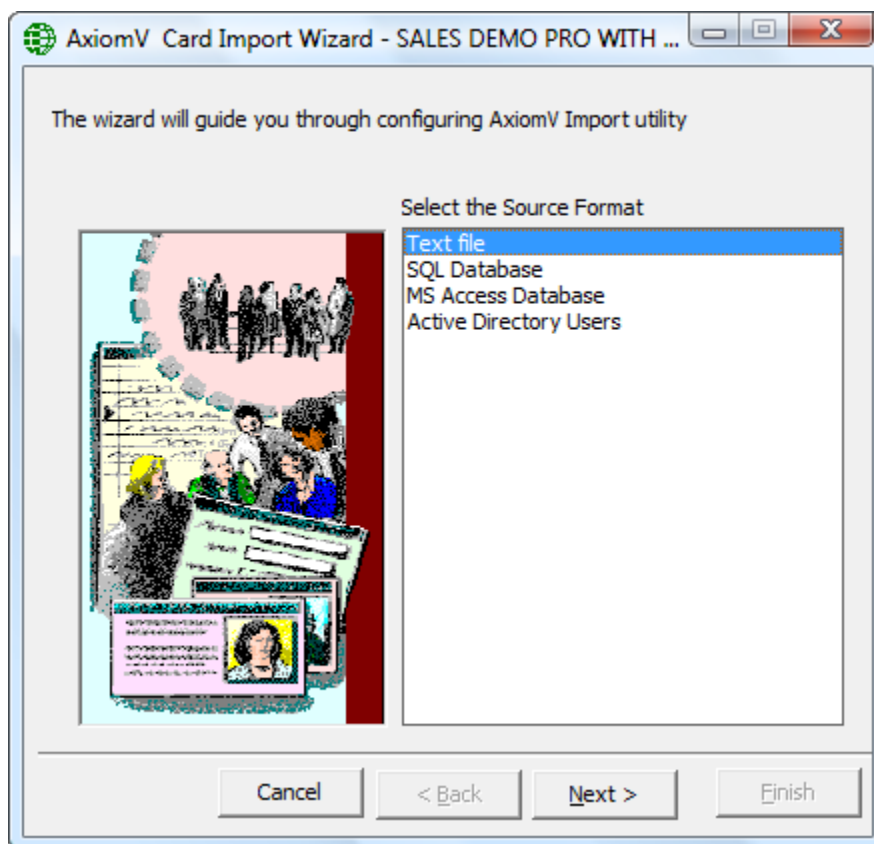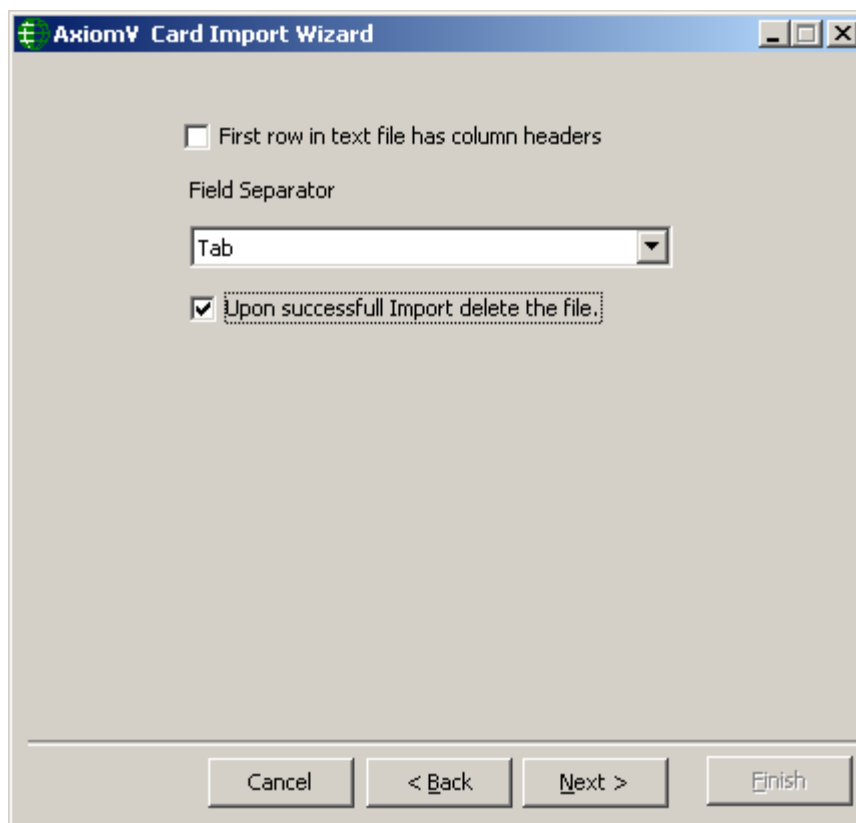

Select one of the four available *Source Formats* of the data to be imported (the location with the cardholder data) and then click the *Next* button.

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Text Format

If you selected *Text File* as the *Source Format*, select the file to be imported from and click the *Next* button. You can use the browse button (…) to search for the path to the required file.

Select the type of *Field Separator* used in the source file and click the *Next* button.

Separators can be:

Tab

Comma (,)

Semicolon (;)

Pipeline (|)

Colon (:)

Check 'First row in text file has column headers' if it is applicable.

Check 'Upon successful Import delete the file' you want the text file deleted after the data has been imported.

Map the source fields to AxiomV™ cardholder fields. Mapping the wrong fields may result in invalid cardholder data. Enter Date Format of the source file if you are importing date fields as well. Check in the Unique Field. If nothing is checked in, Card Number is taken to be the unique field by default.

A multiple cards for a cardholder are now allowed if multiple credentials option is checked in system settings. This will only work if selected unique field belongs to cardholder instead of card. In case of multiple credentials different rules will apply for unique field for adding, deleting card or cardholders. For example, if unique field is initials(cardholder), then all the cards with same initials will be imported under same cardholder and all the cards with same initials will be deleted In order to delete individual card, unique field must be card number. Selecting the wrong unique field may result in invalid cardholder data.

Click *Next* to launch the window to schedule the import.
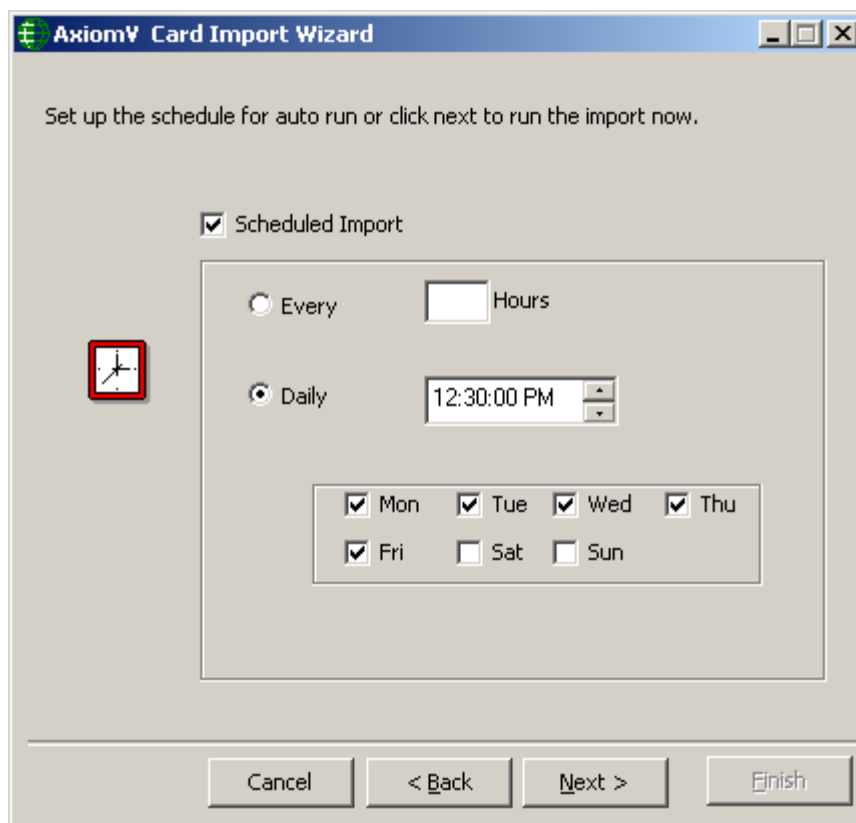
Configure the *Schedule* for importing cardholders' information. Click the *Next* button to have the option of selecting *Run* (to import the selected information right away) or minimize the Wizard to auto run the import at the scheduled time.

The import utility can be set to run at an interval set in hours (e.g. every two hours or every five), or it can be set to run on specific days at a specific time (e.g. 12:30pm).
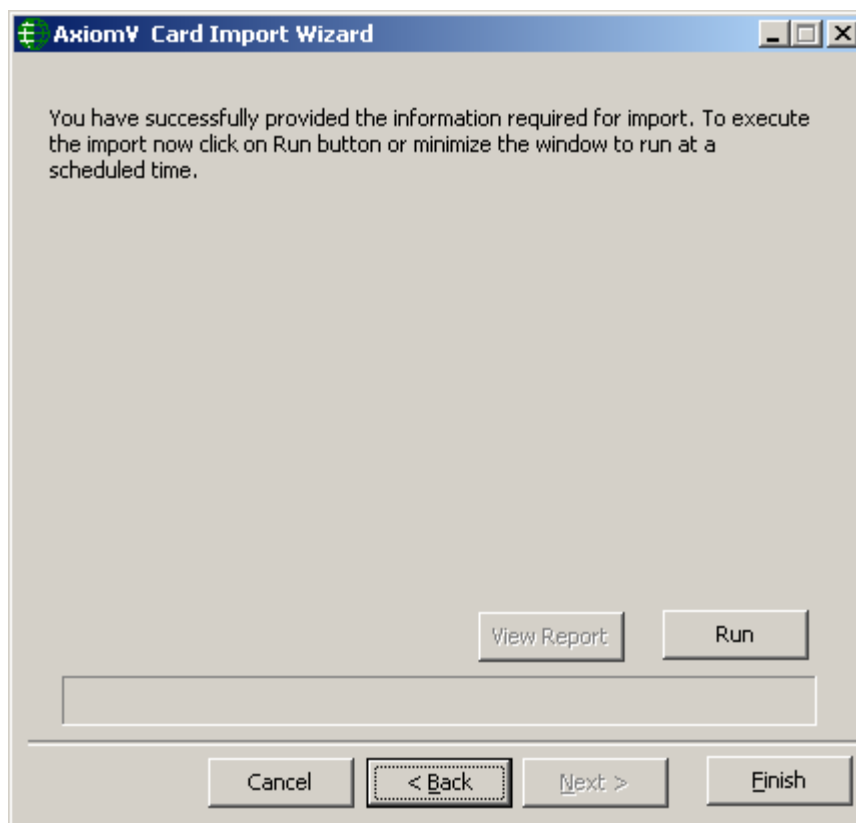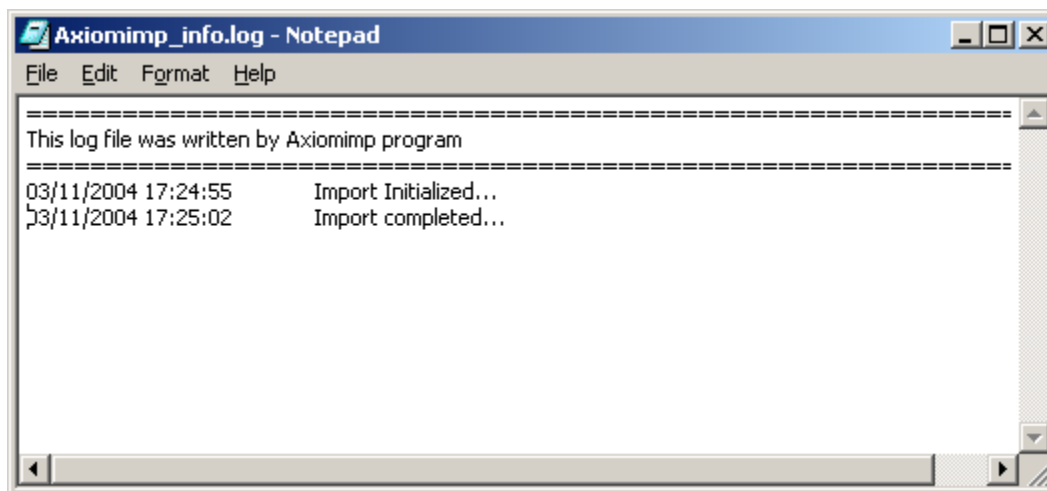
Click on *Run* button to start importing the selected fields from the source file to AxiomV™ cardholder.
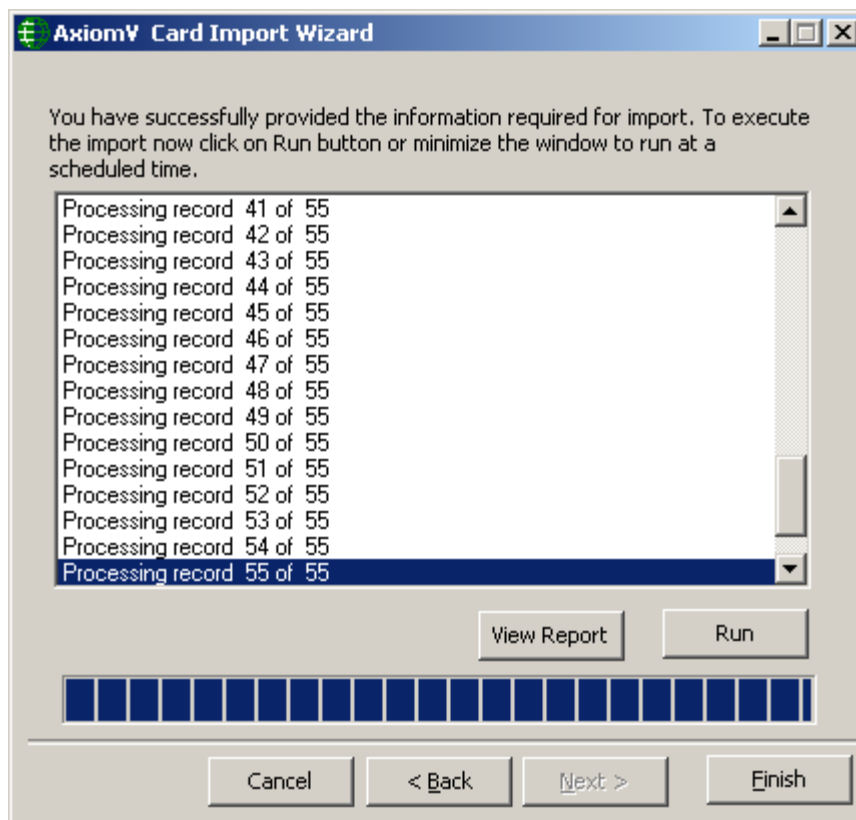
Minimize the Import Wizard to have in auto run mode. Clicking on the *Finish* button will shut down the AxiomV™ Card Import Utility.
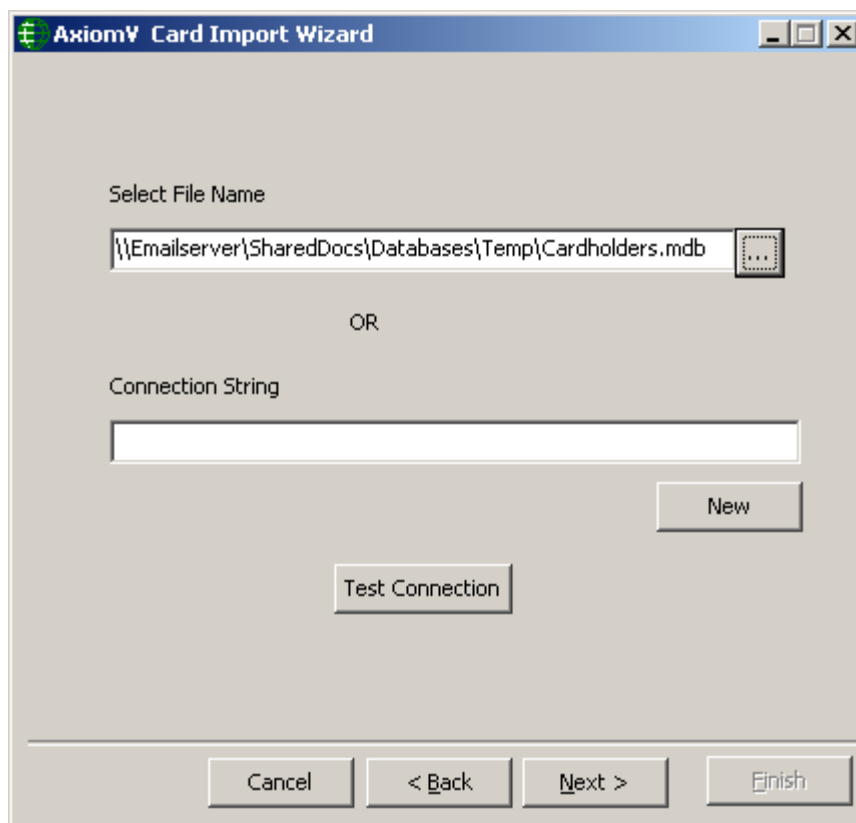
Click on *View Report* button to view Axiom Import Log information once the cardholder information is imported to AxiomV™ cardholder.
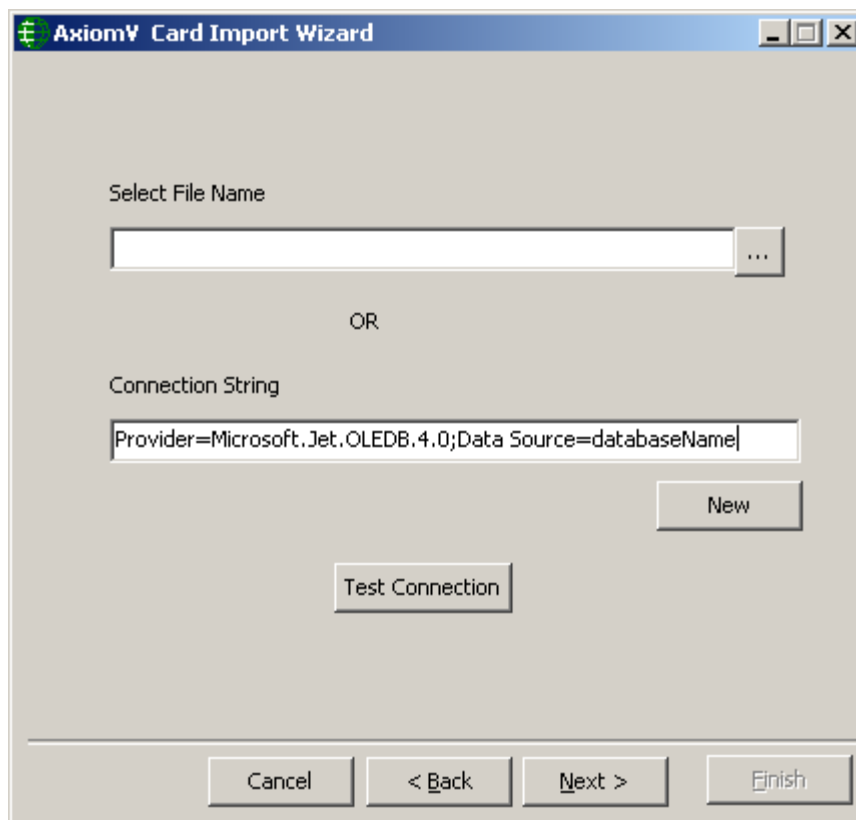
MS Access Database Format
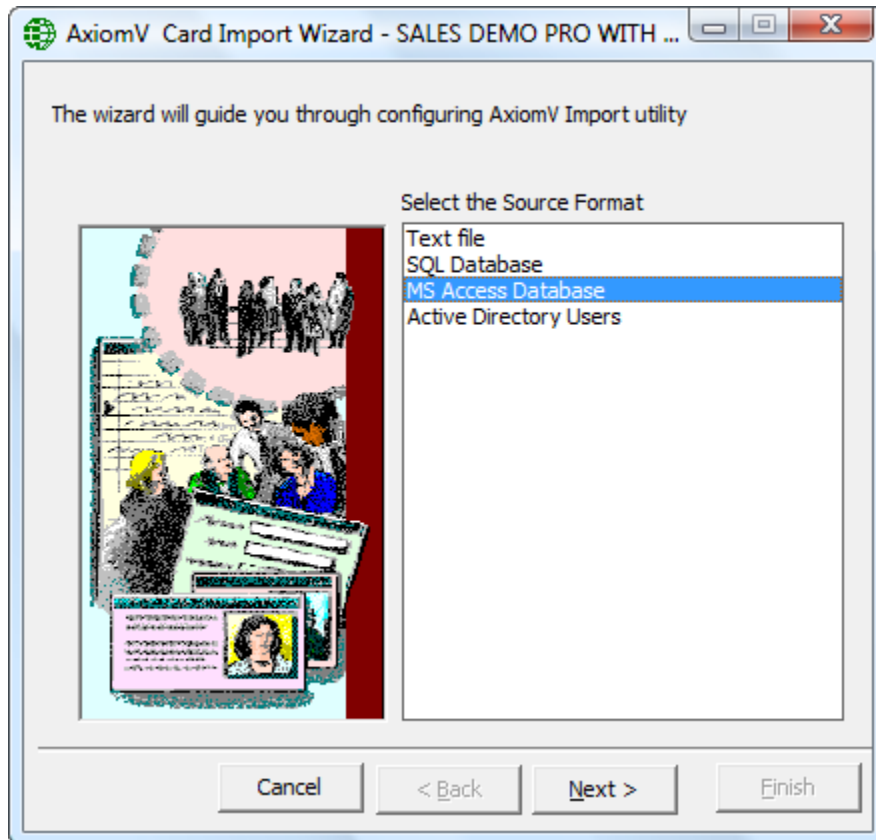
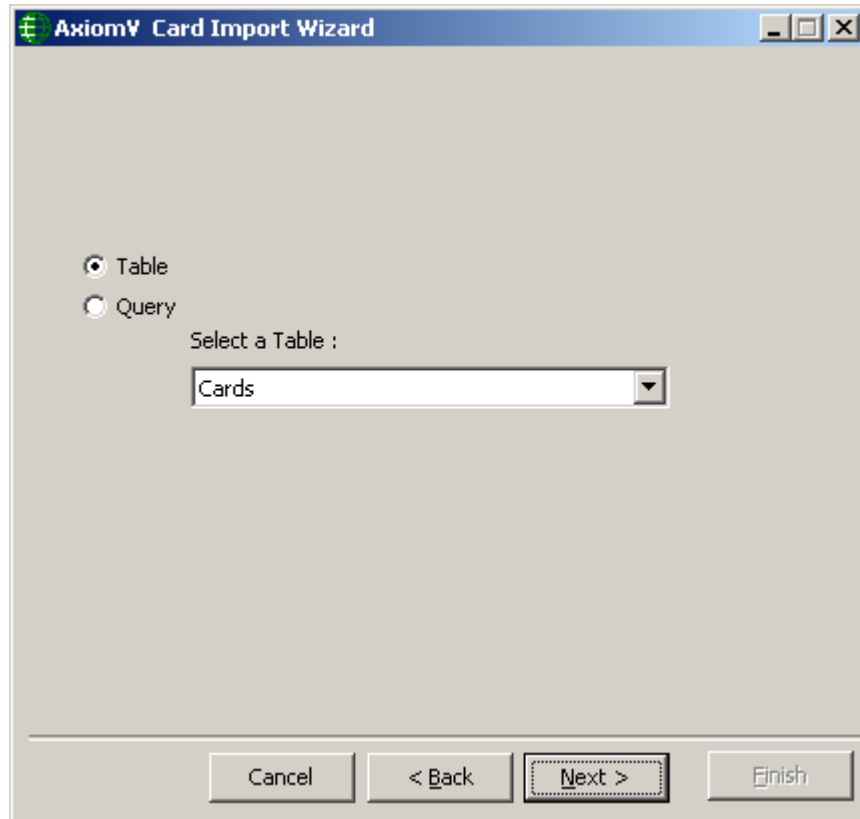

Select the *Source format* as *MS Access Database* and click on *Next* button.

Select the *File Name* or write in the *Connection String*, whichever way the source file from where the cardholder information to be imported, is available.
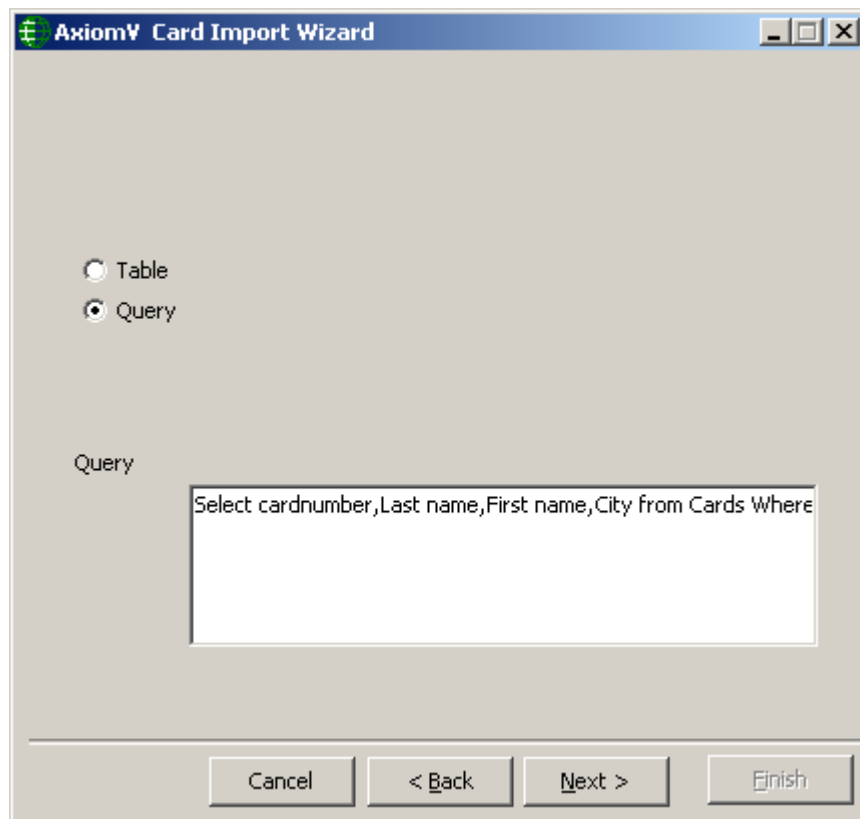
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Select *Table* or *Query* for importing Cardholder information.

Or

AxiomV™ Card Import Wizard

Click on *Next* button to Map the fields to be imported.

Map the source fields to AxiomV™ cardholder fields. Mapping the wrong fields may result in invalid cardholder data. Enter Date Format of the source file if you are importing date fields as well. Check in the Unique Field. If nothing is checked in, Card number is taken to be the unique field by default. Click *Next* to launch the window to schedule the import.

Configure the *Schedule* for importing cardholders' information. Click the *Next* button to have the option of selecting *Run* (to import the selected information right away) or minimize the Wizard to auto run the import at the scheduled time.

The import utility can be set to run at an interval set in hours (e.g. every two hours or every five), or it can be set to run every day at a specific time (e.g. 12:55pm).

Click on *Run* button to start importing the selected fields from the source file to AxiomV™ cardholder.

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Minimize the Import Wizard to have in auto run mode. Clicking on the *Finish* button will shut down the AxiomV™ Card Import Utility.
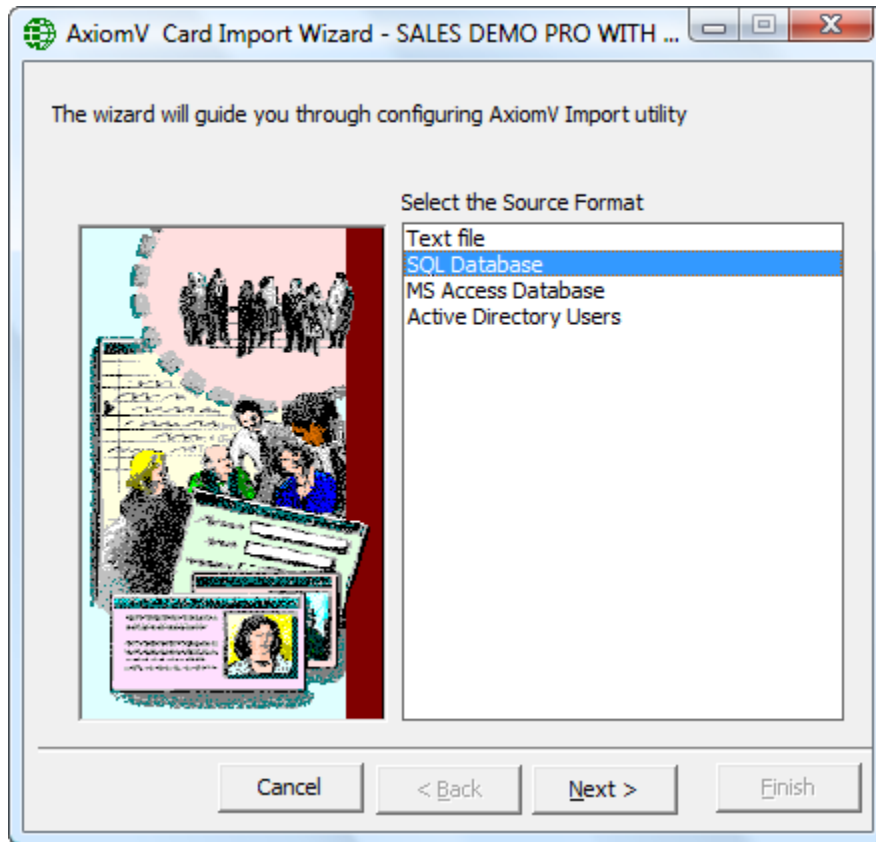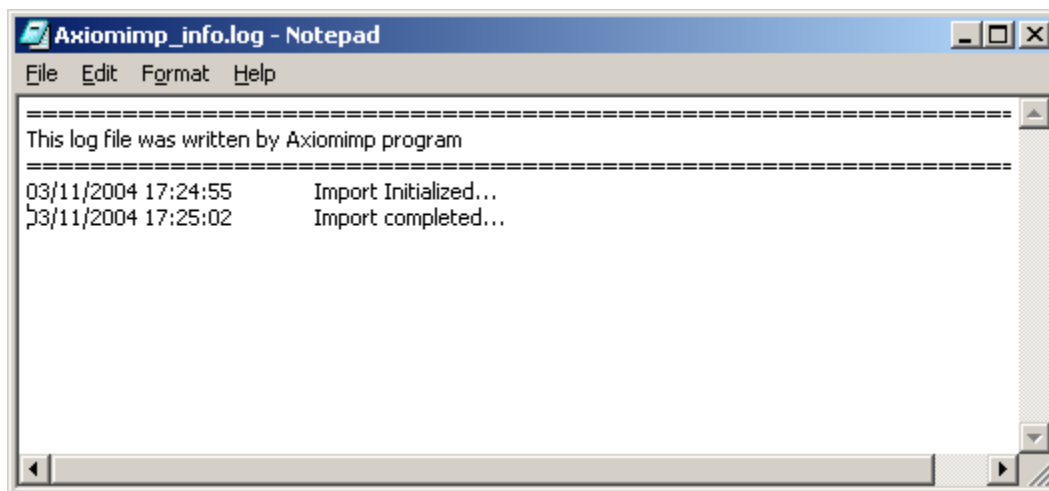
Click on *View Report* button to view Axiom Import Log information once the cardholder information is imported to AxiomV™ cardholder.

```
Axiomimp_info.log - Notepad                                    _ |□| X|
File   Edit   Format   Help
==========================================================
This log file was written by Axiomimp program
==========================================================
03/11/2004 17:24:55          Import Initialized...
03/11/2004 17:25:02          Import completed...
```
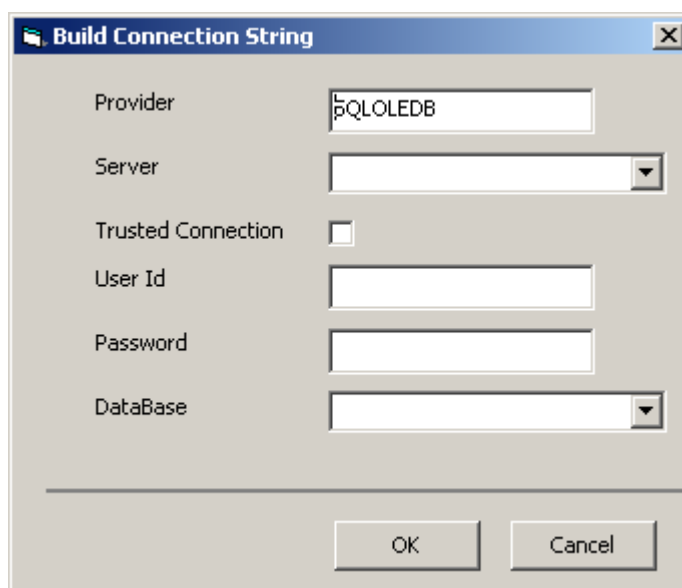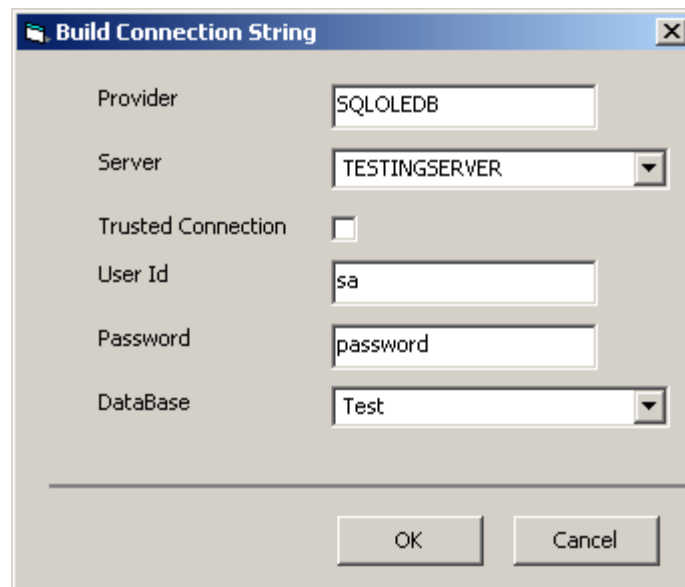
SQL Database Format

Select the *Source format* as *SQL Database* and click on *Next* button.
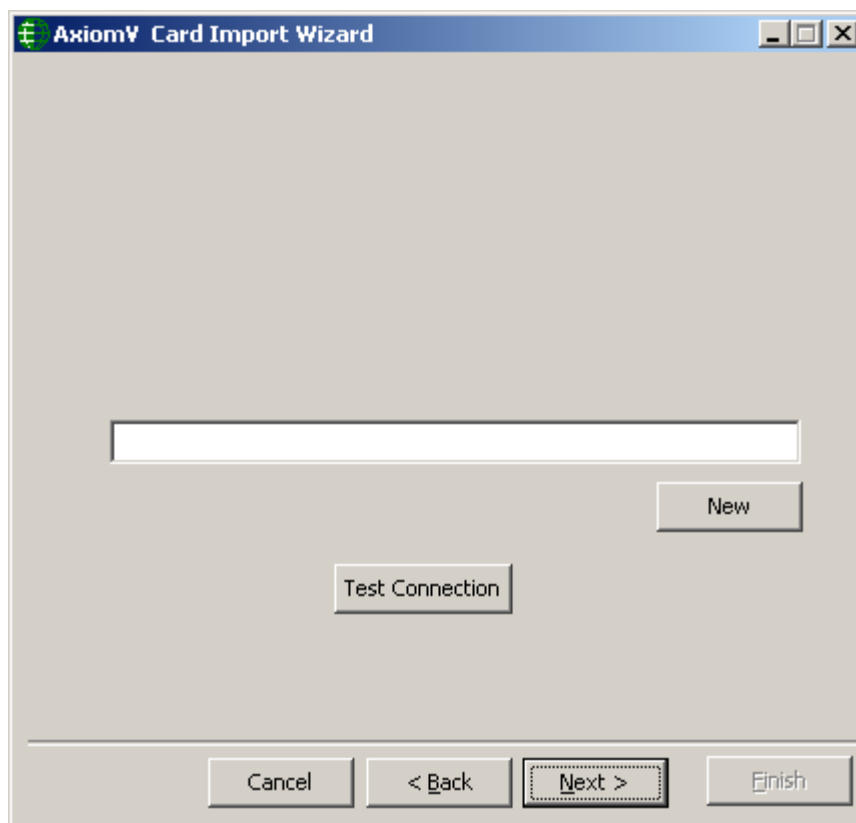
Click on *New* Button to provide the information about the connection string for the SQL database from where the cardholders' information is to be imported.
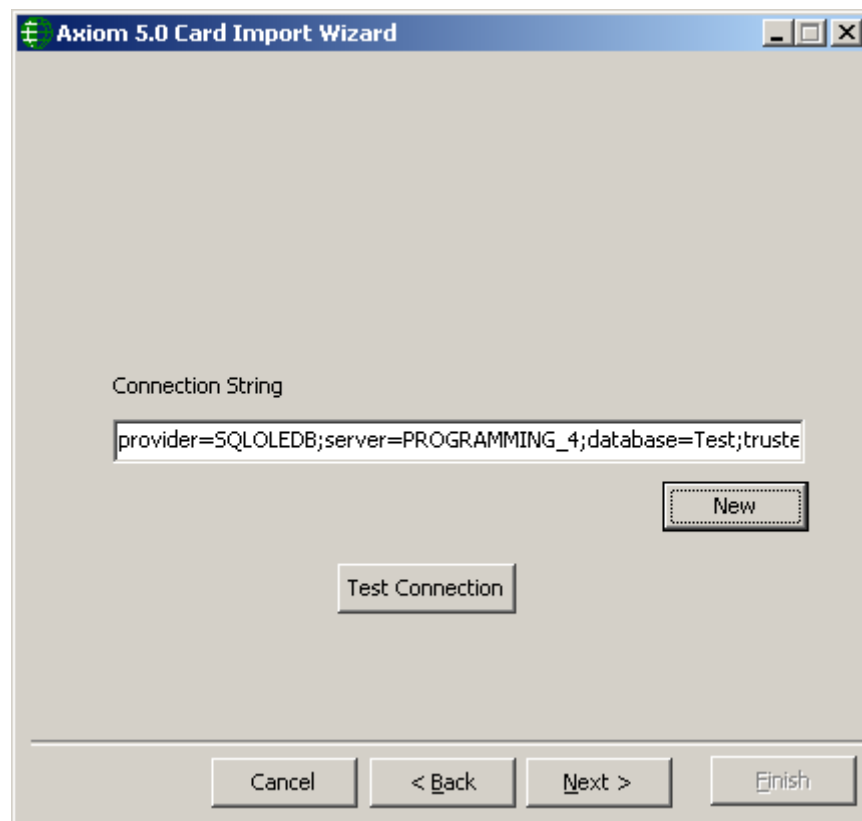

Provide the above information to build a valid connection string. Use 'sa' as the 'User Id' and 'password' for the 'password' if you haven't changed them.

Click *OK* to get back to connection string window.

Click on *Test Connection* button to verify a valid connection string.

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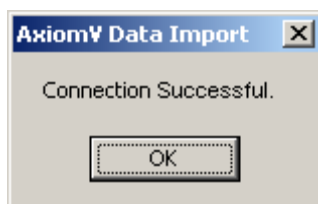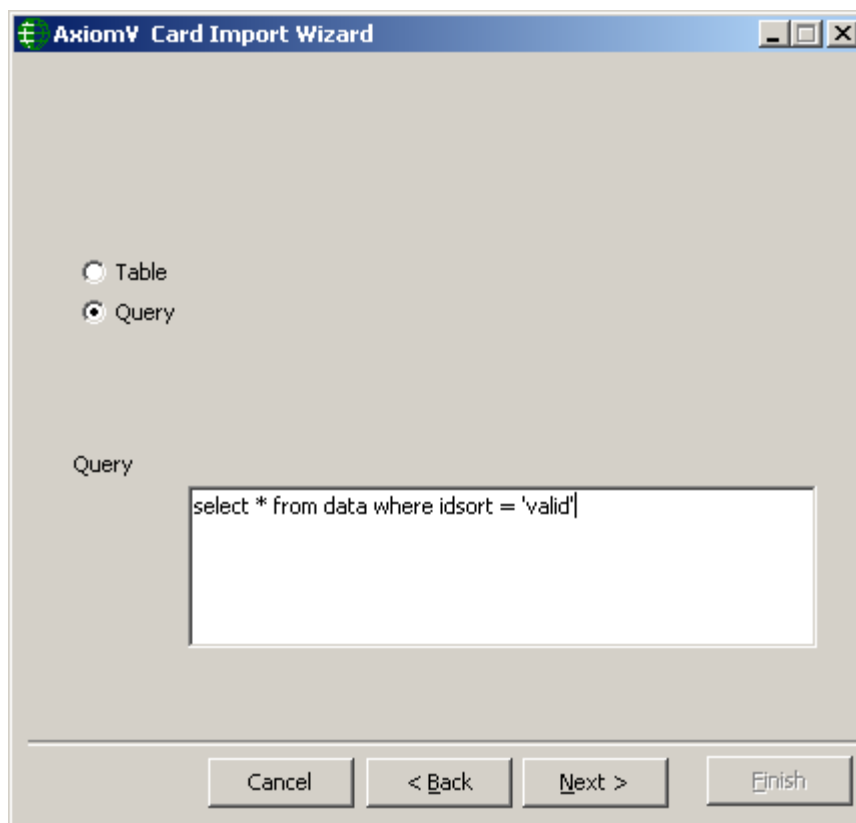
If the information provided is correct, you will get the message 'Connection Successful', otherwise
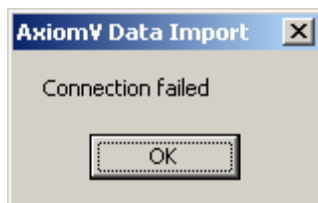
Click on *Next* button after providing a successful connection for importing cardholder SQL database.
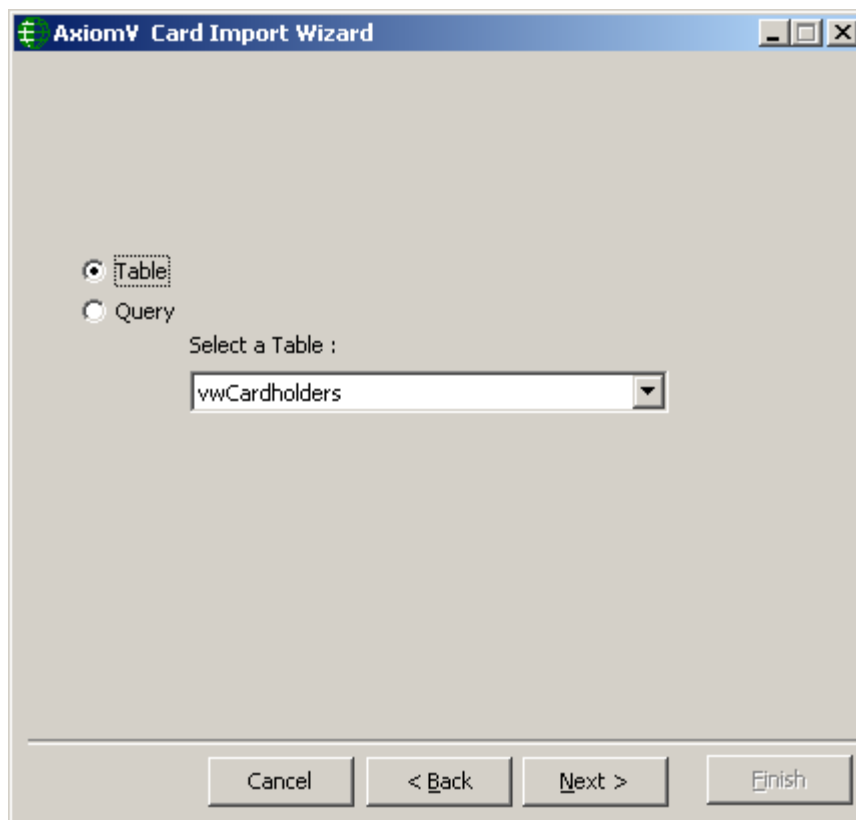
Select *Table* or *Query* for importing Cardholder information. Select the name of the table if 'Table' option is selected or write the query if 'Query' option is selected.

Click on *Next* button to Map the fields to be imported.

Map the source fields to AxiomV™ cardholder fields. Mapping the wrong fields may result in invalid cardholder data. Enter Date Format of the source file if you are importing date fields as well. Check in the Unique Field. If nothing is checked in, Card number is taken to be the unique field by default. Click *Next* to launch the window to schedule the import.

Set up the schedule for auto run at a later date/time or click *Next* to have the option of running import immediately.

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You have successfully provided the information required for import. To execute the import now click on Run button or minimize the window to run at a scheduled time.

View Report   Run
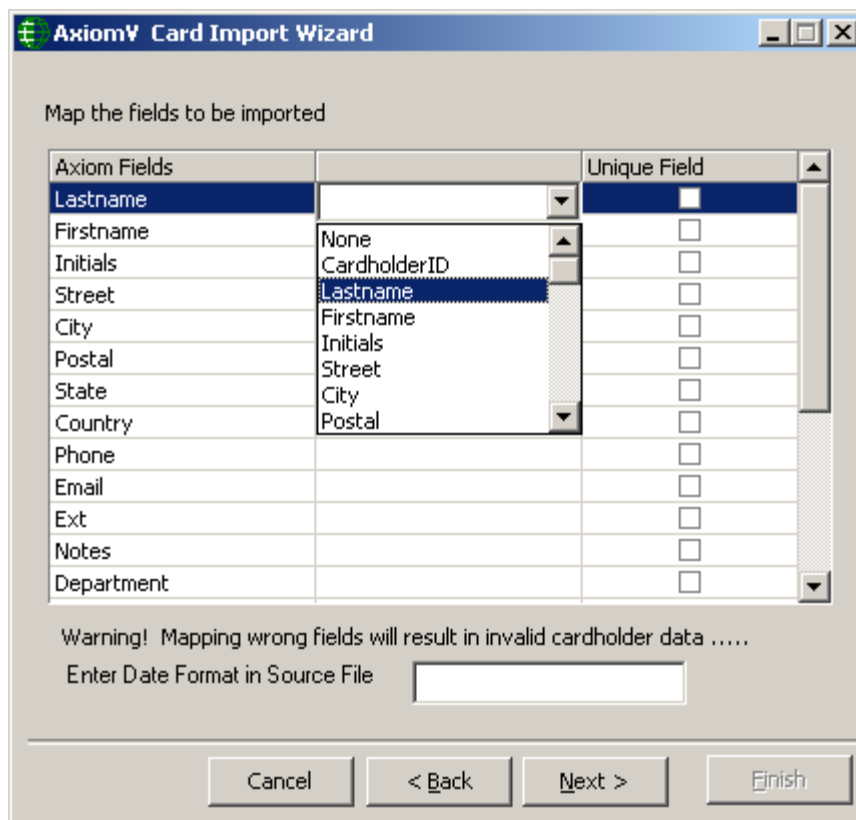
Cancel   < Back   Next >   Finish
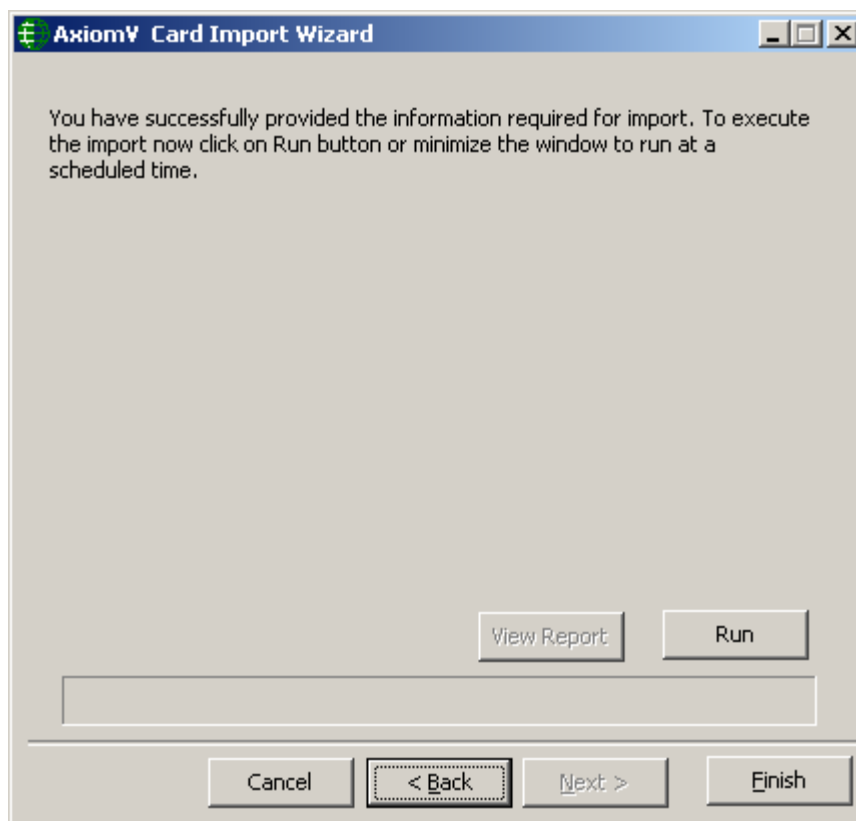
Click on *Run* button to start the import.

AxiomV Card Import Wizard

You have successfully provided the information required for import. To execute the import now click on Run button or minimize the window to run at a scheduled time.

```
Processing record 41 of 55
Processing record 42 of 55
Processing record 43 of 55
Processing record 44 of 55
Processing record 45 of 55
Processing record 46 of 55
Processing record 47 of 55
Processing record 48 of 55
Processing record 49 of 55
Processing record 50 of 55
Processing record 51 of 55
Processing record 52 of 55
Processing record 53 of 55
Processing record 54 of 55
Processing record 55 of 55
```

View Report   Run

Cancel   < Back   Next >   Finish

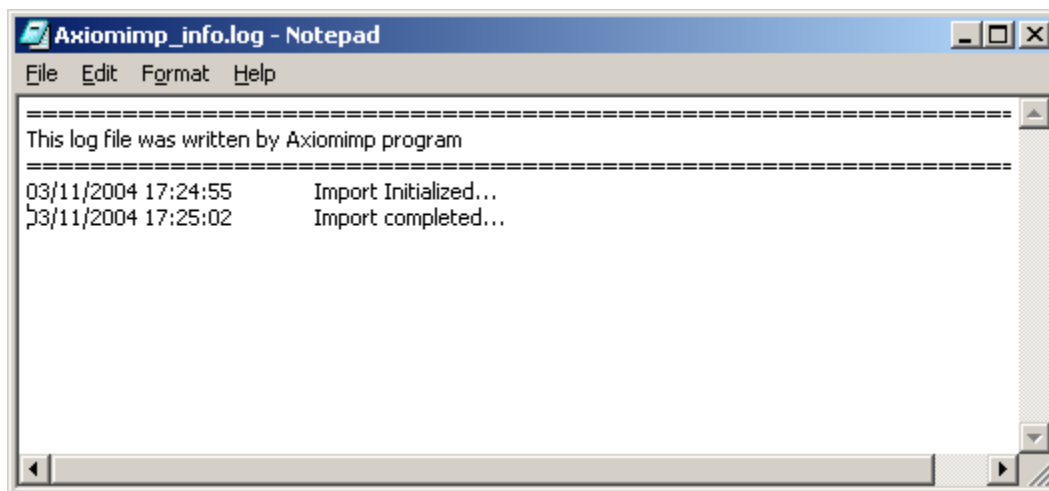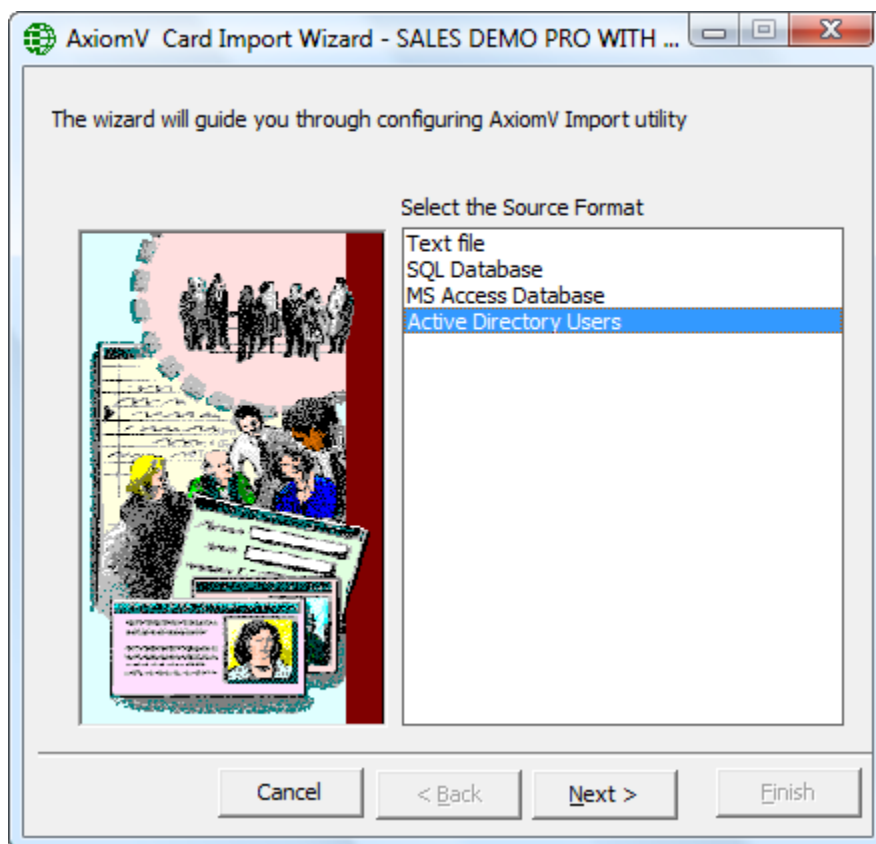Minimize the Import Wizard to have in auto run mode. Clicking on the *Finish* button will shut down the AxiomV™ Card Import Utility.

Click on *View Report* button to view *Axiomimp_info.log* file to check the error messages for import, if any.
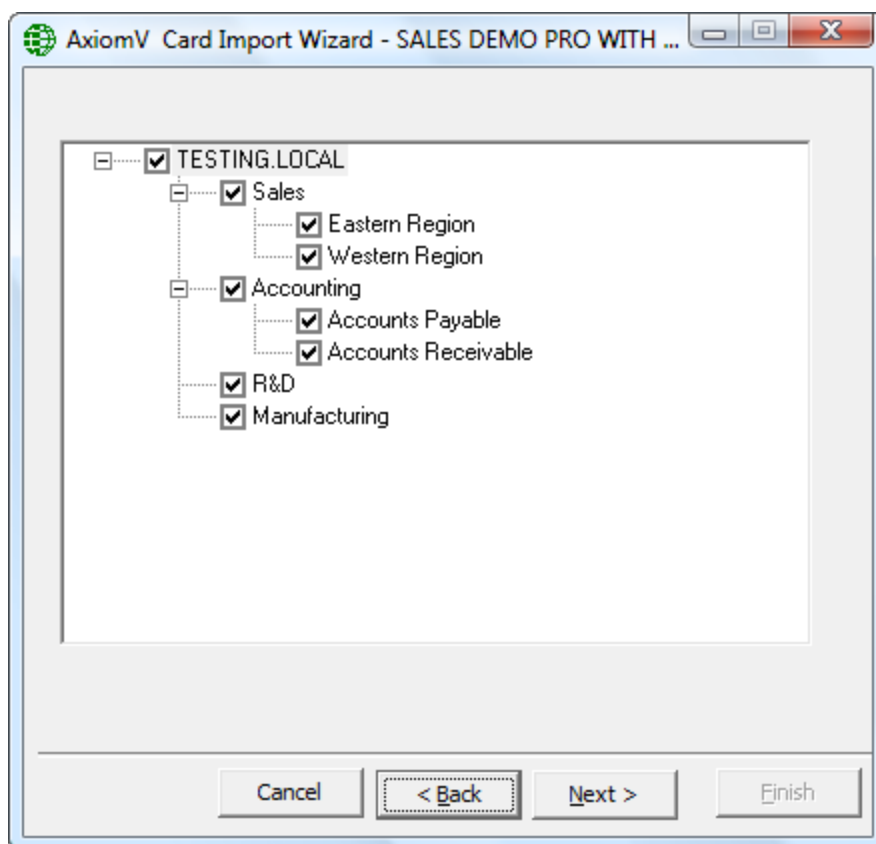
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Active Directory Users

You **must** be logged on as a Domain User for this selection to work.

Select the *Source format* as *Active Directory Users* and click on *Next* button.

A view of the Domain's Organization Units will be displayed so that you may select which ones to import from. Click on the boxes to check or uncheck. Selected units will be used to update the AxiomV™ cardholders.

Click the *Next* button to continue.

Choose source fields from the User's properties to be mapped to the desired Axiom fields. Source data from the User's properties will be used to create (or update, if the cardholder already exists) cardholders in the AxiomV™ system. Check *Unique Field* for fields where data is not to be duplicated (e.g. cardnumber).

If dates are to be imported then enter the format for the dates in *Enter Date Format in Source File*.

When *Usage Count* is selected the import will change the count during the import to the data provided in the source field, if the box is check (*add card usage to existing count, if selected*), then the data in the source field will be added to the existing count value instead of overwriting it.

Click the *Next* button to continue.
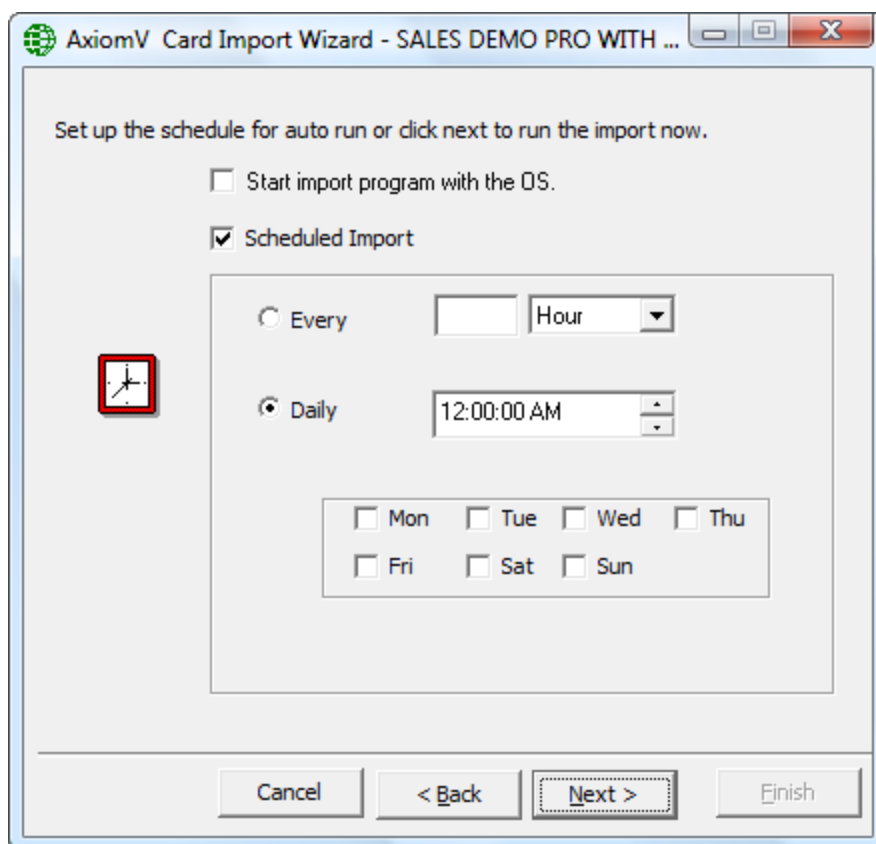
You can set this utility to run whenever the operating system starts, to run on a schedule, or you can have it run now. A scheduled import can run periodically or on specified days at specified times.

Click the *Next* button to continue.
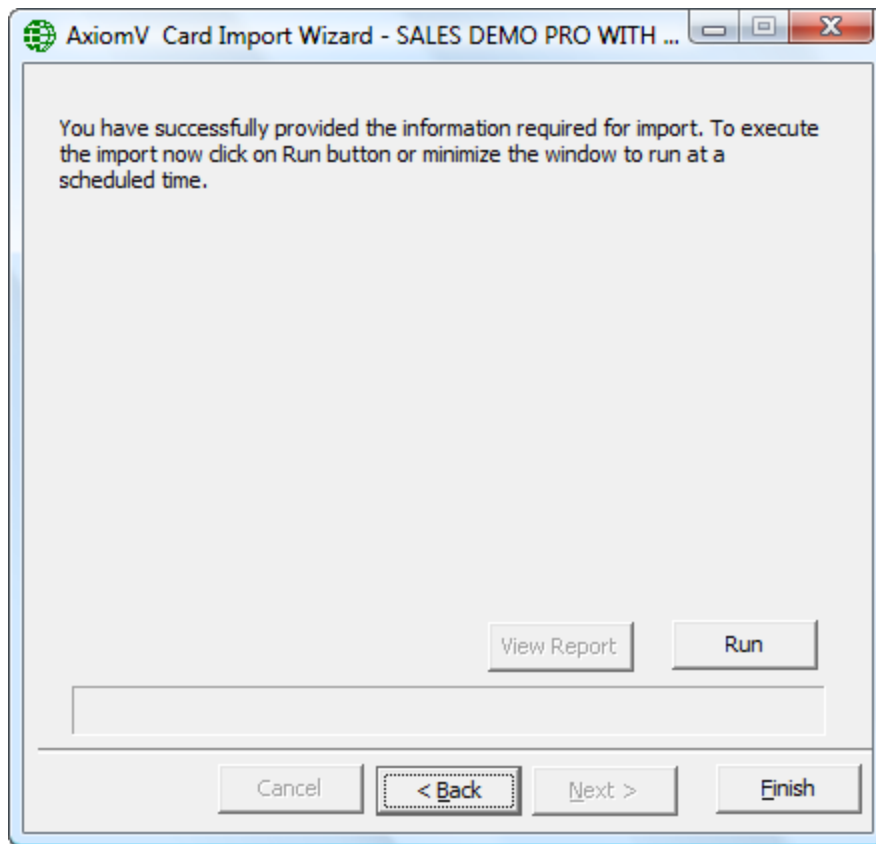
Click *Run* to run the import now or minimize the window to run at a scheduled time. Selecting *Finish* will close the utility and the schedule will **not** run the import.