

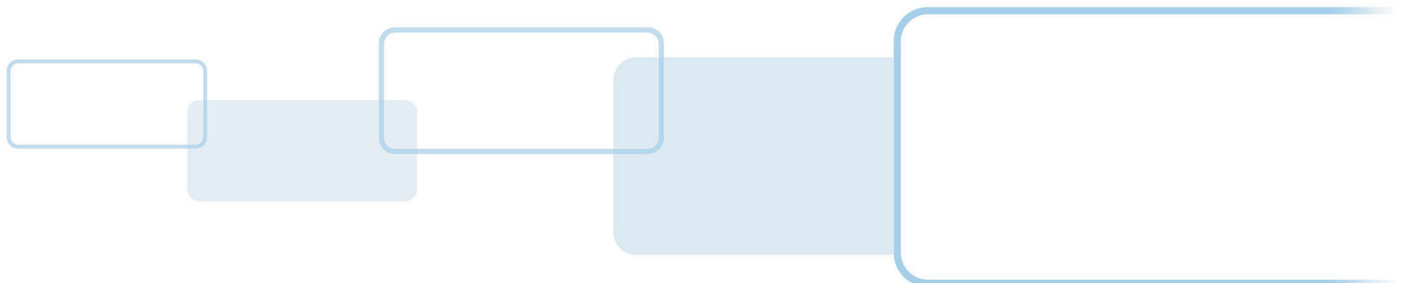


# **EASYLOBBY® EMPLOYEE IMPORT UTILITY**

## **USER GUIDE**

PLT-03855, Rev. B.0

January 2019



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## Revision history

Date	Description	Revision
January 2019	Initial release.	B.0

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# Section 1

## 1 Import employee data

The Employee Import utility is used by administrators to import employee data into an EasyLobby database. The utility allows you to import employee data from a delimited text file, Active Directory or ODBC database. It also allows the imported data fields to be mapped to the EasyLobby employee fields.

### 1.1 Sample files

Some sample files are also provided in the **Utilities** sub-folder. A small sample import is provided by the files **Sample.csv** and **Sample.map**. The .map file tells the Employee Import utility how the .csv input data file is structured. This sample also shows how employee photos can be imported into the EasyLobby database. Some additional samples have been provided by the files **LargeData.csv**, **TestSample.csv** and their associated map files.

### 1.2 Data file format

The .csv data file is a text file that contains comma-delimited or tab-delimited employee records. You can open this file in Microsoft Excel or a text editor.

- Each line/row of text in the file represents a single employee record.
- Optionally, the first line/row may be used as a header row containing the title for each field (cell). This makes the file easier to understand if it is being manually edited. The header row should use the same delimiter (comma or tab) as the employee records.

The data file may contain only fields of information that are significant to you, and in any order you like. It may also contain arbitrary field names that best describe the content they hold. During import, you will have the opportunity to map your fields to the fixed range of fields provided in the EasyLobby employee record format. Your data file's header row might look like this:

`FirstName,LastName,Title,Department,Phone`

Each subsequent line/row of text contains information about one employee record. An example of a small but complete data file is shown in bold text below:

<b>Purpose (row)</b>	<b>Date file contents</b>
<b>Header row</b>	<code>FirstName,LastName,Title,Department,Phone</code>
<b>Employee 1 details</b>	<code>John,Brown,Manager,Support,888-111-2222</code>
<b>Employee 2 details</b>	<code>Jane,Smith,VP,Engineering,888-111-3333</code>
<b>Employee 3 details</b>	<code>Sam,Jones,Engineer,Engineering,888-111-4444</code>
<b>Employee 4 details</b>	<code>Jill,Johnson,Sales Rep,Sales,888-111-5555</code>

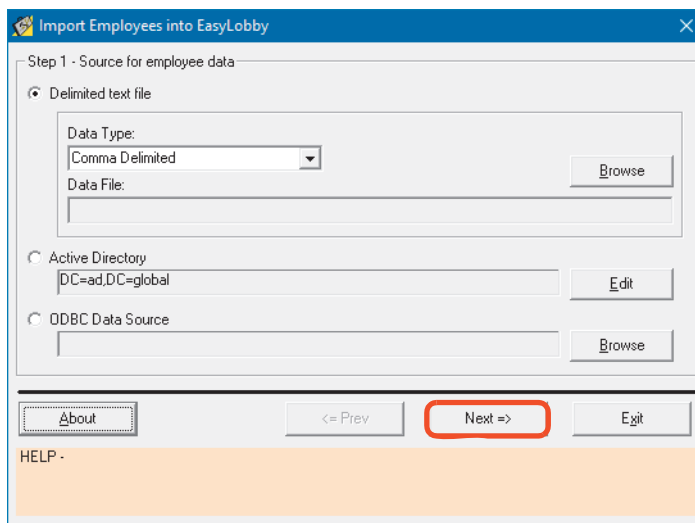
## 1.3 Using the Employee Import utility

The Employee Import utility must be run on a system that already has EasyLobby SVM installed. The program file, **EmployeeImport.exe**, is found in the **Utilities** sub-folder of your EasyLobby SVM installation folder.

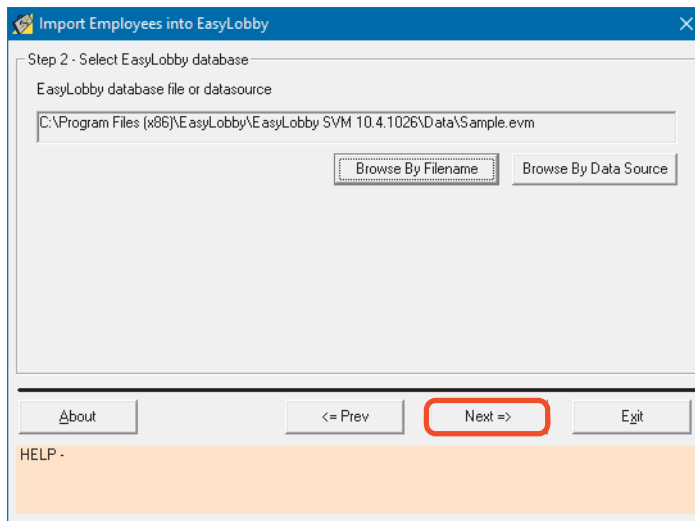
**Note:** Before importing data, it is advisable to open EasyLobby SVM and export or backup existing data.

To import employee records from another database or a spreadsheet:

1. Run EmployeeImport.exe from the Utilities\EmployeeImport folder on the EasyLobby DVD, or from the installation folder, normally C:\Program Files (x86)\EasyLobby\EasyLobby SVM 10.0\Utilities.
2. Select the employee data source. The choices are a Delimited text file, Active Directory, or ODBC Data Source. If you are using the Delimited Text File option, you must first create a comma or tab delimited text file (.csv or .tab) of your employee information; see *Section 1.2 Data file format*. Click **Next =>**.

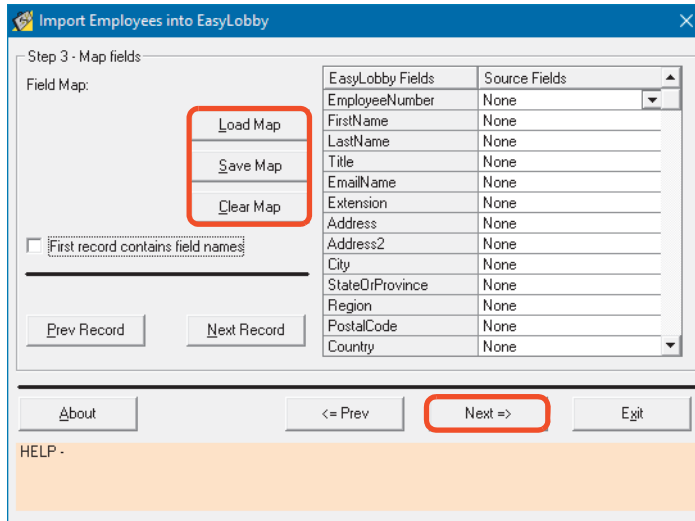


3. Select the EasyLobby database. For Microsoft Access databases click **Browse by Filename**. For Microsoft SQL Server and Oracle databases, click **Browse by Data Source**. Click **Next =>**.

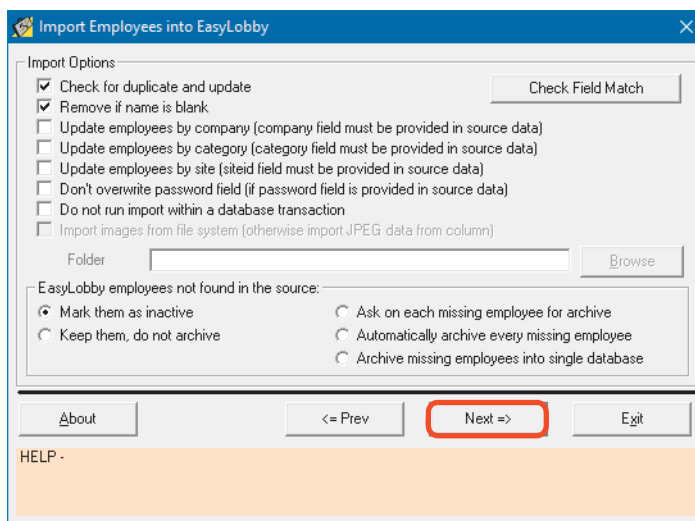


4. The next step is to map the fields in the source file to the fields in EasyLobby. In the **Source Fields** column, click the down arrow ▼ to the right of the field you want to map. If the arrow is not visible, click at the left side of the source field cell. The list of fields available in the source file is displayed. Select the field that corresponds to the field in the **EasyLobby Fields** column. If the first record/row of the database contains field names (not employee data), check **First record contains field names**.

You can save the mapping configuration for future use. This is useful if you are loading information from more than one source file, as you can save a separate mapping for each source. Click **Save Map** to save the map, **Load Map** to load a map, and **Clear Map** to clear the current selections. See *Section 1.4 Map file format* for more information about map files.



5. Click **Next =>**.
6. The import options allow you to control what happens when importing a database.



#### ■ Import Options

**Check for duplicate and update:** If a duplicate record is found in the imported database, the matching record will be updated. Click **Check Field Match** to set which fields will be used to determine a match. Email is often the best data field for determining a match.

**Remove if name is blank:** If an incoming record contains blank name fields, it will not be imported. If this option is cleared, any record is imported even if it has blank name fields.

**Update employees by company:** The company field is used as a priority. Even if an imported record matches an existing record, a new record will be created if the company is different.

**Update employees by category:** The category field is used as a priority. Even if an imported record matches an existing record, a new record will be created if the category is different.

**Update employees by site:** The site field is used as a priority. Even if an imported record matches an existing record, a new record will be created if the site is different.

**Don't overwrite password field** prevents an employee's current password being overwritten by one present in an imported record.

**Do not run import within a database transaction** causes the employee import operations to be performed as separate SQL queries instead of using a single SQL *transaction*, which could be disallowed by the server.

- EasyLobby employees not found in the source:

**WARNING:** This option requires careful selection. Most options will delete (archive) existing employees in your EasyLobby database if their records aren't included in your imported file. If your data source includes details of new employees only, be sure to select **Keep them, do not archive**.

**Mark them as inactive:** If the imported file does not contain a record that matches an employee currently in the EasyLobby database, the employee will be marked as inactive (no longer employed).

**Keep them, do not archive:** If the imported file does not contain a record that matches an employee currently in the EasyLobby database, the employee will remain and will not be marked as inactive. Select this option if your imported file contains only records for new employees.

**Ask on each missing employee for archive:** If the imported file does not contain a record that matches an employee currently in the EasyLobby database, a prompt is displayed to allow you to save an archive file for the employee. The employee is then deleted from the current database. The .evm archive file can be opened in EasyLobby for later reference.

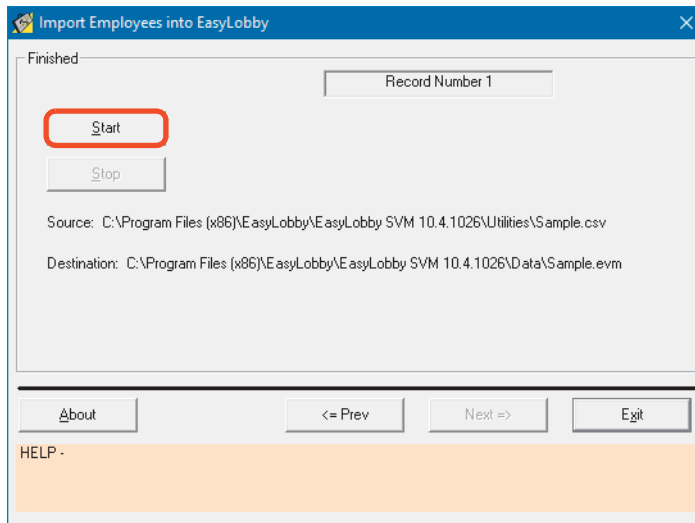
**Automatically archive every missing employee:** If the imported file does not contain a record that matches an employee currently in the EasyLobby database, an employee archive file (.evm) is saved automatically. The employee is then deleted from the current database. The .evm archive file can be opened in EasyLobby for later reference.

**Archive missing employees into single database:** If the imported file does not contain records that match employees currently in the EasyLobby database, an employee archive file (.evm) is saved containing all the unmatched employees. The employees are then deleted from the current database.

7. Click **Next =>**.



8. Click **Start** to begin the employee database import.



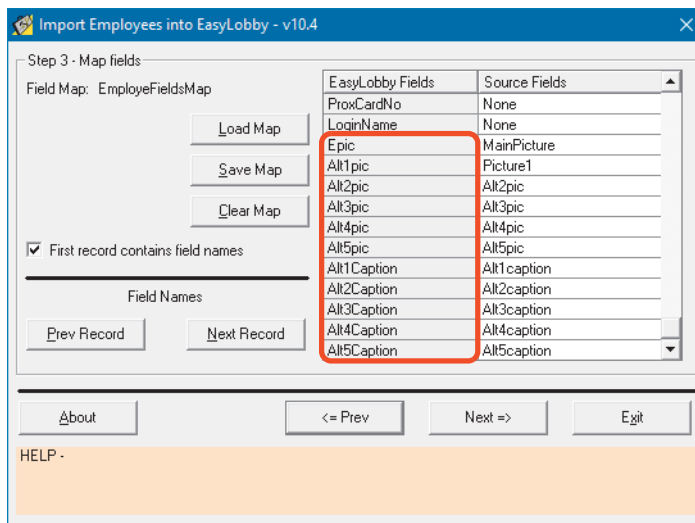
### 1.3.1 Import images

In EasyLobby, the employee form's **Photos** and **Associates** tabs can each display three images. To populate these images, you can include up to six additional fields in your database file which contain links to image files. Optionally, you can include five more fields to hold captions for the last five images. When imported, the images and captions will appear in the employee form.

1. In your .csv file, include extra fields to reference the images.

BI	BJ	BK	BL	BM	BN
ProxCARDNo	LoginName	CreationDate	ModifiedDate	MainPicture	Picture1
701601501401301	jsmith1	07/10/17 1:02	08/11/17 2:03	"JohnSmithFormal.jpg"	"JohnSmithCasual.jpg"

- If a photo is stored in the same folder as the database file being imported, the field in the import record must contain just the filename, e.g. **JohnSmith.jpg**.
  - If the photos are stored in a different folder, the field must include the full path name in quotation marks, e.g. **"F:\Pictures\JohnSmithFormal.jpg"**.
  - A caption field contains the text of the caption. Quotation marks are not necessary. The caption will be imported only if the corresponding image field is also imported, e.g. Alt3Caption requires Alt3pic.
2. When you map your image fields to the EasyLobby fields (see *Section 1.3 Using the Employee Import utility*, step 4.) use the **Epic**, **Alt1pic** and **Alt1Caption** fields located at the bottom of the **EasyLobby Fields** column.



The following table describes where the images appear in EasyLobby:

Field	Appears in	Notes
Epic	<b>Photos</b> tab, image 1	This is always the main employee picture. It appears at the top of the employee form and in the first image slot on the <b>Photos</b> tab. It has no caption.
Alt1pic Alt2pic	<b>Photos</b> tab, images 2 and 3	If supplied, Alt1Caption and Alt2Caption appear below Alt1pic and Alt2pic.
Alt3pic Alt4pic Alt5pic	<b>Associates</b> tab, left to right	If supplied, Alt3Caption, Alt4Caption and Alt5Caption appear below Alt3pic, Alt4pic and Alt5pic.

## 1.4 Map file format

The map file is a text file that contains a single line of text. This file describes the "mapping" between the fields in your data file and the fields in the EasyLobby database.

The map file is built when you use the column matching tool in step 4. of the Employee Import wizard. You must have a header row as the first row in your data file so that the fields in your data file can be displayed and mapped to fields in the EasyLobby employee record. If your source is an Active Directory, the standard user fields are provided for mapping purposes.

The map file has 69 fields. Each field must be present in the map file. In the map file, each field is delimited with a comma.

For each field in the map file, if the field is present in your data file, you must provide the 0-indexed number of the position of that field in your data file. If the field is not provided by your data file, you must put the value "None" in that field, with the exception of the first field (EmployeeID), which must have the value "NA". You may also put a specific value in a field enclosed in square brackets. In this case this specific value will always be assigned to every imported employee record. For example, putting in the specific value "[Staff]" for the Category field would set the category for each imported record to "Staff".

The following is an ordered list of the fields in the map file:

1. EmployeeID	17. Group	33. UserDefined9	49. IdNumber (SSN)	65. Alt1Caption
2. EmployeeNumber	18. EmergencyContact	34. UserDefined10	50. DateOfBirth	66. Alt2Caption
3. FirstName	19. EmergencyPhone	35. UserDefined11	51. License	67. Alt3Caption
4. LastName	20. EmergencyExtension	36. UserDefined12	52. LicenseExpiration	68. Alt4Caption
5. Title	21. Pager	37. IsActive	53. InsuranceCompany	69. Alt5Caption
6. EmailName	22. Fax	38. Gatekeeper	54. PolicyNumber	
7. Extension	23. CellPhone	39. Password	55. Notes	
8. Address	24. WebSite	40. Approval	56. Status	
9. Address2	25. UserDefined1	41. Approver	57. ProxCardNo	
10. City	26. UserDefined2	42. Department	58. LoginName	
11. StateOrProvince	27. UserDefined3	43. Company	59. Epic	
12. Region	28. UserDefined4	44. Category	60. Alt1pic	
13. PostalCode	29. UserDefined5	45. Siteld	61. Alt2pic	
14. Country	30. UserDefined6	46. Building	62. Alt3pic	
15. HomePhone	31. UserDefined7	47. Floor	63. Alt4pic	
16. WorkPhone	32. UserDefined8	48. Office	64. Alt5pic	

Continuing with the example given above, the associated map file for that sample data would be as follows:

#### Data file (.csv):

```
NameFirst,NameLast,Title,Unit,Phone
John,Brown,Manager,Support,888-111-2222
```

#### Map file (.map):

```
NA,None,0,1,2,None,None,None,None,None,None,None,None,None,None,4,None,None,None,None,None,None,
None,None,None,None,None,None,None,None,None,None,None,None,None,None,3,None,None,None,None,None,
None,None,None,None,None,None,None,None,None,None,None,None,None,None,None,None,None,None,
None,None,None,None,None,None,None,None
```

In the map file, the third field (FirstName) has the value of 0, indicating that the first field (0) in the data file, called NameFirst, will be mapped to EasyLobby's FirstName field. Similarly, the map file's 36th field (Department) has the value 3, indicating that the fourth field (0-indexed) in the data file, called "Unit", will be mapped to EasyLobby's Department field.

Note that the above map example constitutes a continuous, single line of text, but is shown with line breaks for clarity. In the actual map file it should be on a single line.

### 1.4.1 Importing relational fields

In the import file are a number of relational fields, namely Department, Company, Category and Site Id. In the EasyLobby database, these employee fields are managed lists, and are stored in separate tables and related to by the field in the employee table. In the Employee Import utility, you use natural text in the import data file for the relational fields. For example for Department, you might use values such as "Sales", "Marketing", "Engineering" and "Administration". The EasyLobby import utility will match up the value in one of these relational fields with an existing entry in the associated table, or if the value does not exist, will create new records as required.

# Section 2

## 2 Automating and scheduling

### 2.1 Automating the employee import process

Once you have set up your data and map files, EmployeeImport utility options, and validated the import by importing a .csv file, you can run the utility without opening it each time. Under normal operation, the utility runs as a wizard with a series of GUI screens that take you through the import process. After you have completed the entire process, and successfully imported a data file, all the settings are stored in the system registry. You now have the option to run EmployeeImport.exe from a command line or batch file, using the /S switch (silent mode), for example:

```
employeeimport.exe /S
```

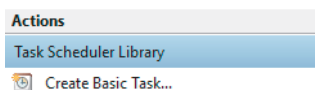
This will run the utility again using all the previous settings.

### 2.2 Task scheduler

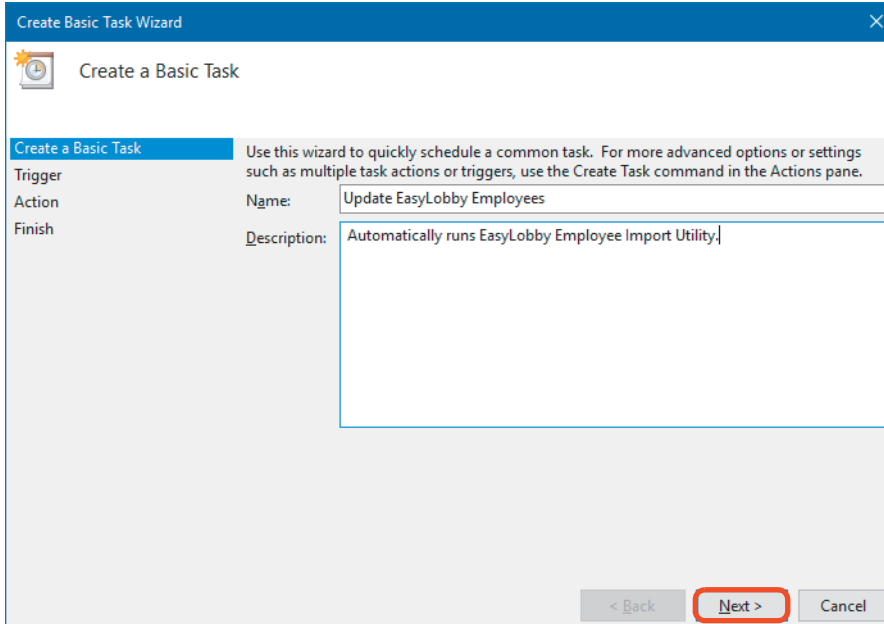
**Note:** A separate installer, called **EmployeeImport100Setup.exe** is provided on the EasyLobby product DVD in the "Installs" folder. This installer allows you to install the EmployeeImport program onto a server for the purposes of running it on a periodic schedule, for example, nightly.

After you have setup the Employee Import Utility and successfully imported employees, you can use the Windows Task scheduler to make exactly the same process run automatically at preset intervals.

1. Open Control Panel and click **System > Administrative Tools > Task Scheduler**.
2. In the **Actions** column, click **Create Basic Task**.



3. Type a name for the task and, optionally, a description. Click **Next**.



Create Basic Task Wizard

Create a Basic Task

Use this wizard to quickly schedule a common task. For more advanced options or settings such as multiple task actions or triggers, use the Create Task command in the Actions pane.

Trigger

Action

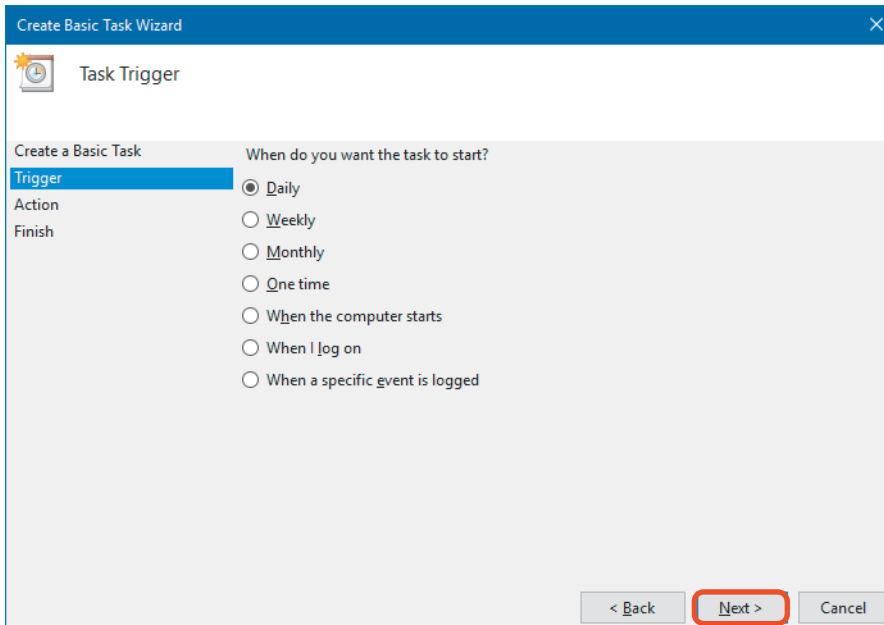
Finish

Name: Update EasyLobby Employees

Description: Automatically runs EasyLobby Employee Import Utility

< Back Next > Cancel

4. Select the frequency at which to perform the task. Click **Next**.



Create Basic Task Wizard

Task Trigger

When do you want the task to start?

Trigger

Action

Finish

☒ Daily

☐ Weekly

☐ Monthly

☐ One time

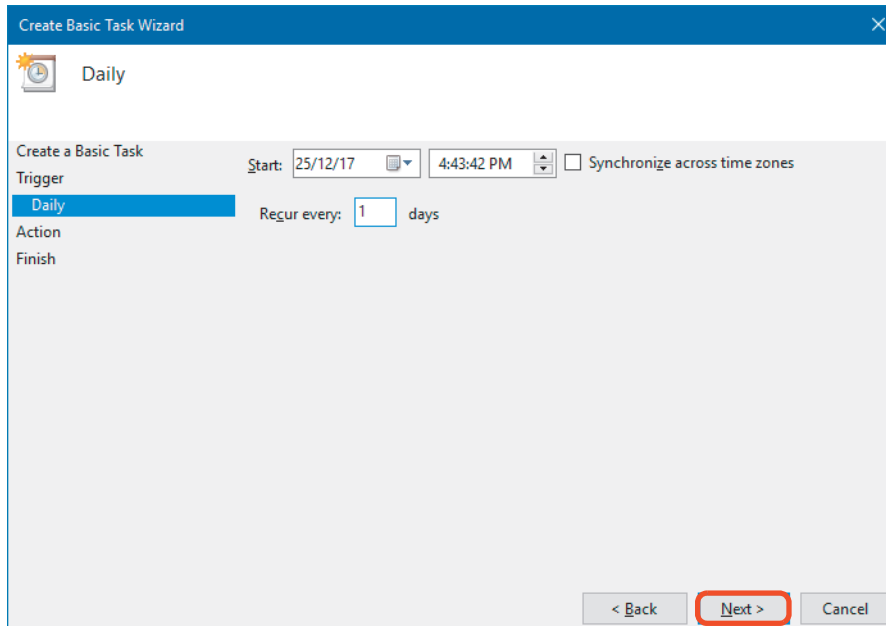
☐ When the computer starts

☐ When I log on

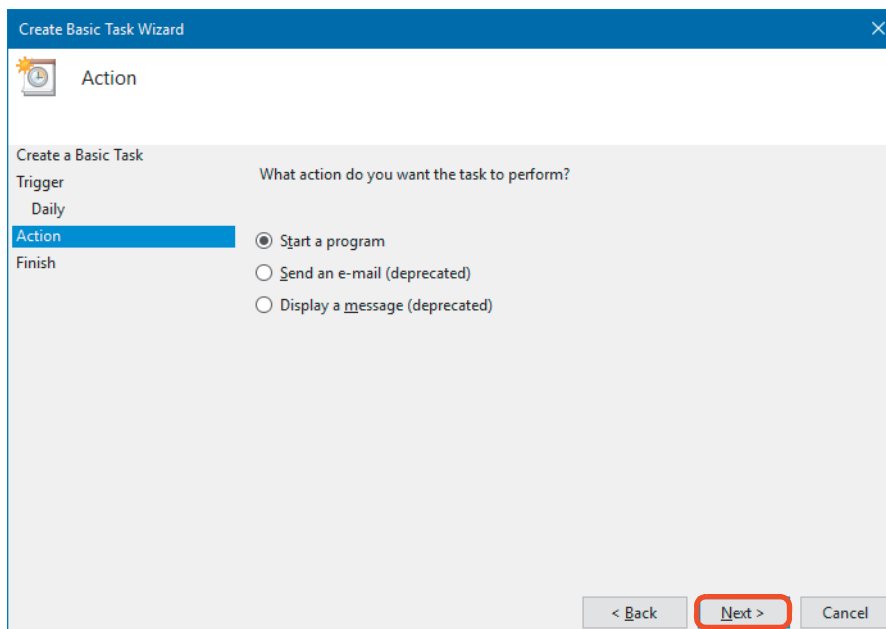
☐ When a specific event is logged

< Back Next > Cancel

5. Select the start date and time for the task. Leave **Recur every** set to 1 to make the task run every day. Note that this dialog differs depending on whether you chose daily, weekly, monthly, etc., on the previous dialog.

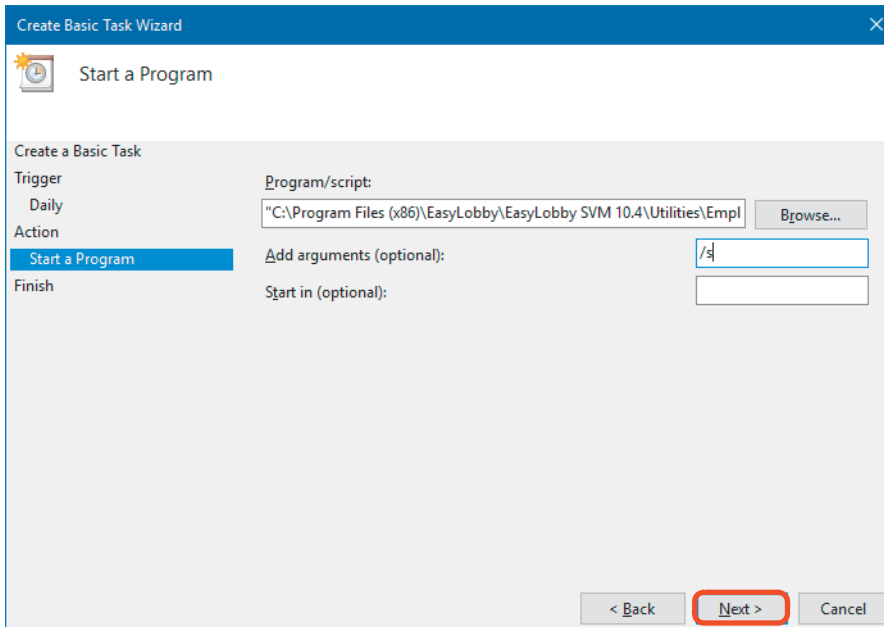


6. Select **Start a program** and then click **Next**.



7. Click **Browse** and locate EmployeeImport.exe in the installation folder, normally C:\Program Files (x86)\EasyLobby\EasyLobby SVM 10.0\Utilities.

In the **Add Arguments (optional)** box, type /s, then click **Next**.



Create Basic Task Wizard

Start a Program

Create a Basic Task

Trigger: Daily

Action: Start a Program

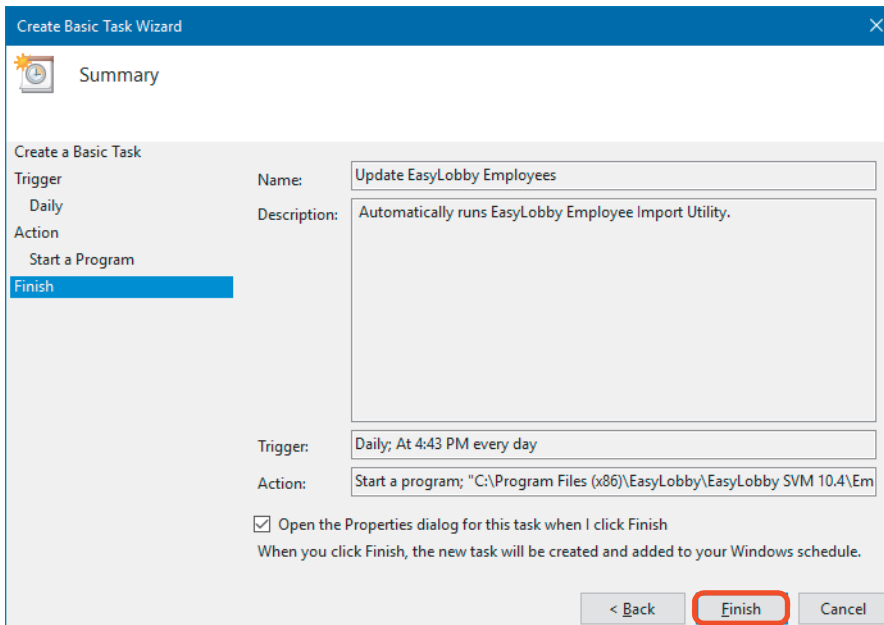
Program/script: "C:\Program Files (x86)\EasyLobby\EasyLobby SVM 10.4\Utilities\Empl" Browse...

Add arguments (optional): /s

Start in (optional):

< Back Next > Cancel

8. The final confirmation dialog indicates that the scheduled task setup is complete. Check the **Open the Properties dialog for this task when I click finish** option and click **Finish**.



Create Basic Task Wizard

Summary

Create a Basic Task

Trigger: Daily

Action: Start a Program

Finish

Name: Update EasyLobby Employees

Description: Automatically runs EasyLobby Employee Import Utility.

Trigger: Daily; At 4:43 PM every day

Action: Start a program; "C:\Program Files (x86)\EasyLobby\EasyLobby SVM 10.4\Em

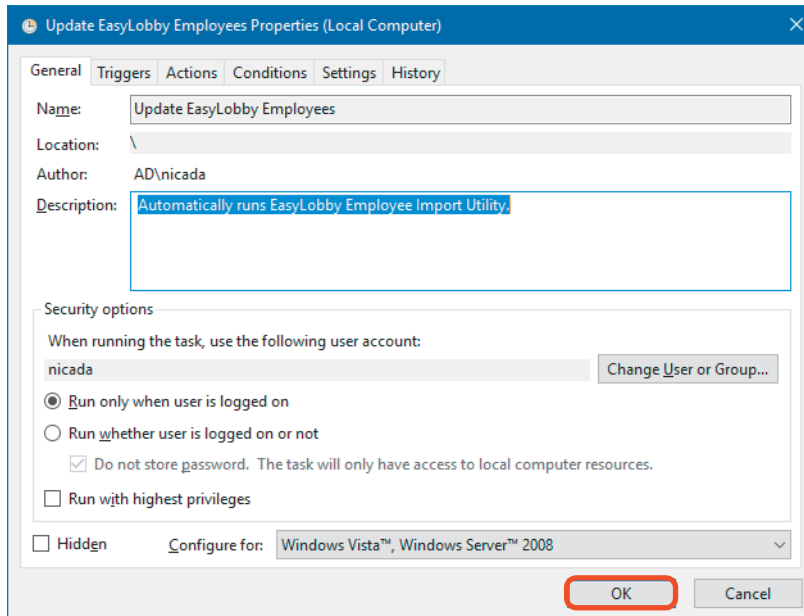
☒ Open the Properties dialog for this task when I click Finish

When you click Finish, the new task will be created and added to your Windows schedule.

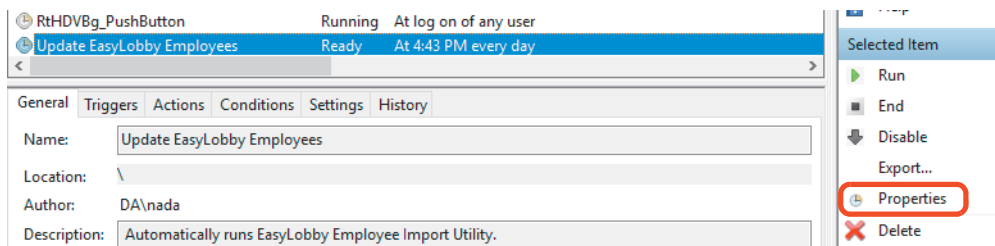
< Back Finish Cancel



9. In the **Security options** area you can select the user account under which the task will run, typically an administrator account. The **Conditions** and **Settings** tabs allow you to further define when the task should run. Click **OK** to finish.



10. To make further edits to the task, select it in the list of tasks in the central pane of the Task Scheduler window, then click **Properties** in the right pane.



## 2.3 Technical support

For more information or support on the employee import utility, contact HID at [support@easylobby.com](mailto:support@easylobby.com), or on 866-607-7339 option 4.

