

Importing users

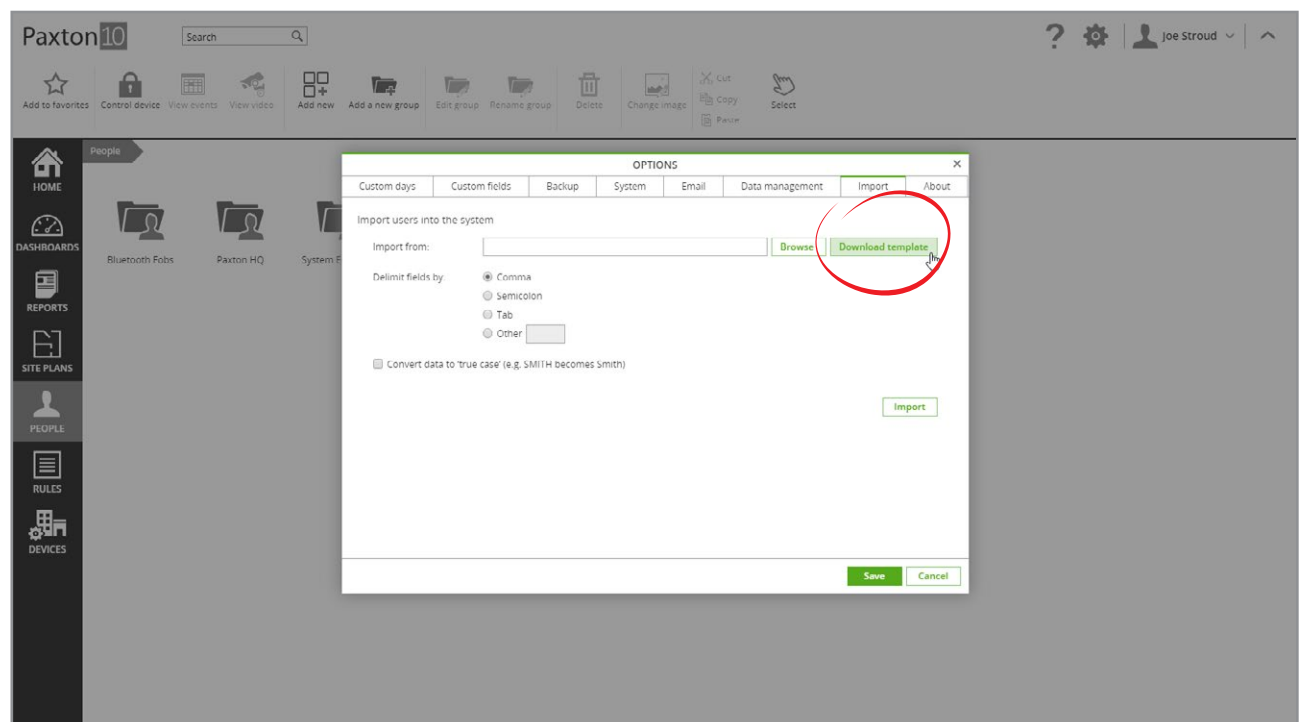
Overview

User data can be imported into a Paxton10 system to add or update user records. Paxton10 will accept information in the form of a text (TXT) file or a comma separated values (CSV) file. These standard file formats are supported by most database or spreadsheet software packages including Microsoft Excel and Access.

Producing a file for import

To simplify the import process, use the template provided.

1. Click on the 'System options' cog in the top right corner
2. Select the 'Import' tab
3. Click on 'Download template'



A CSV file will be downloaded to your downloads folder. Add users to this file, each as a new row, to be imported into your system.

First name / Last name

This is the name of the user you want to import, these fields are compulsory.

Group

Imported users can be placed automatically into a group. Type in the name of an existing group, or enter a new name to create a new group. Users imported into a group will adopt any permissions or behaviour associated with that group. Leaving this field empty will place the user outside of any group.

Building permission

Enter the name of an existing building permission to add the imported users to the permission, in addition to any permissions they will inherit by their group membership. Leave this blank to not apply any additional permissions to the user.

Email address

Email address must be unique. If a user already exists in the system with the entered email address, importing will update the existing user's record with any new or updated information.

Valid from / Expiry date

If required, enter a date the person will be valid from, and when the person's permissions will expire.

Custom fields

Any additional headers will add the information to a custom field if one can be found with the same name, otherwise new custom fields will be created with the relevant data type.

Fields and formats

Some fields, including any custom fields, require data of a certain type or format:

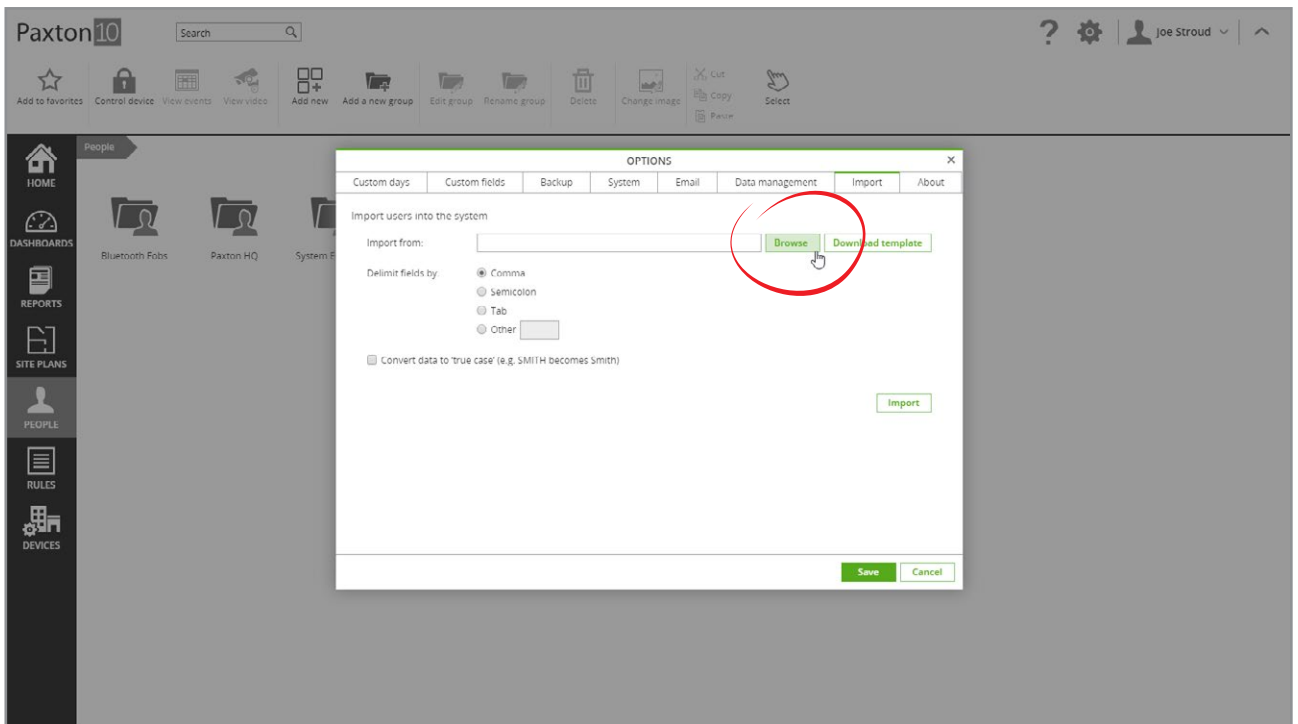
Date	DD/MM/YY
Email	example@email.com
Check box	Y/N or 1/0
Number	Any number between 0 and 999999999
Text	Any character, maximum of 4000 characters

Import users

To import users into the system:

1. Click on the '**System options**' cog in the top right corner
2. Select the '**Import**' tab
3. Click '**Browse**' to locate the file containing the users to import. (Ensure your file is saved either as a .TXT or .CSV file)
4. Click '**Import**'

Warning: It is strongly advised to do a system backup prior to importing users.



Example CSV file

1	First name	Last name	Group	Building permission	Email address	Valid from	Expiry date	Address	Employee?
2	Diana	Perry	Cleaners	Cleaners permission	cleaner2@example.com	01/05/2018			Y
3	Judy	Head	Cleaners	Cleaners permission	cleaner2@example.com				Y
4	Jonathan	Taylor	Cleaners	New permission	cleaner2@example.com	25/11/2017	25/01/2018		N
5	Sarah	Rogers	Cleaners	Cleaners permission	cleaner4@example.com	26/11/2017			Y
6	Jennifer	Walker							N
7	Jean	Sanders	Managers	All appliances, all the time	manager@example.com				Y
8	Martha	Foster	Managers	All appliances, all the time		15/01/2016	14/01/2018		N
9	Theresa	Henderson							Y
10	Paula	Carter		New permission	paulacarter@example.com				N
11	Judith	Perez			judithperez@example.com				N
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Frequently asked questions

How do I import credentials?

Currently, it is not possible to import credentials from another system.

Can I update details of existing users?

To update details of existing users, ensure the user records contain an email address, then include the email address in the import file, along with the user's name and updated information. If the email addresses are found to match existing users, the import will update these users with any new or changed information.

Can I import users directly from the export of a Net2 system?

Yes. In Net2, select the export feature from the top file menu, then in Paxton10 using the import tab, simply browse to the CSV file Net2 exported and click import.

Note: Not all data exported by Net2 can be imported into Paxton10 (e.g. Access levels are not imported meaning new building permissions must be created).

Can I import users directly from the export of a third party system?

The import can identify data from a number of headings and can extract data where custom delimiters are used. Providing a name field can be detected, Paxton10 will do its best at importing what it can. For best results, use the template provided.

Always do a system backup prior to importing if you are unsure of the results.