



User Import Module Settings Guide

ACFA PSIM 1.1

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1 Introduction into User Import Module Settings Guide

On the page:

- Purpose of document
- General information about the User import module

1.1 Purpose of document

The *User Import Module Settings Guide* is a reference manual designed for *User import* configuration technicians and operators. This manual is part of the *ACFA PSIM* software system.

This Guide presents the following materials:

1. General information about the *User import* module.
2. Activation of the *User import* module.
3. Working with the *User import* module.

1.2 General information about the User import module

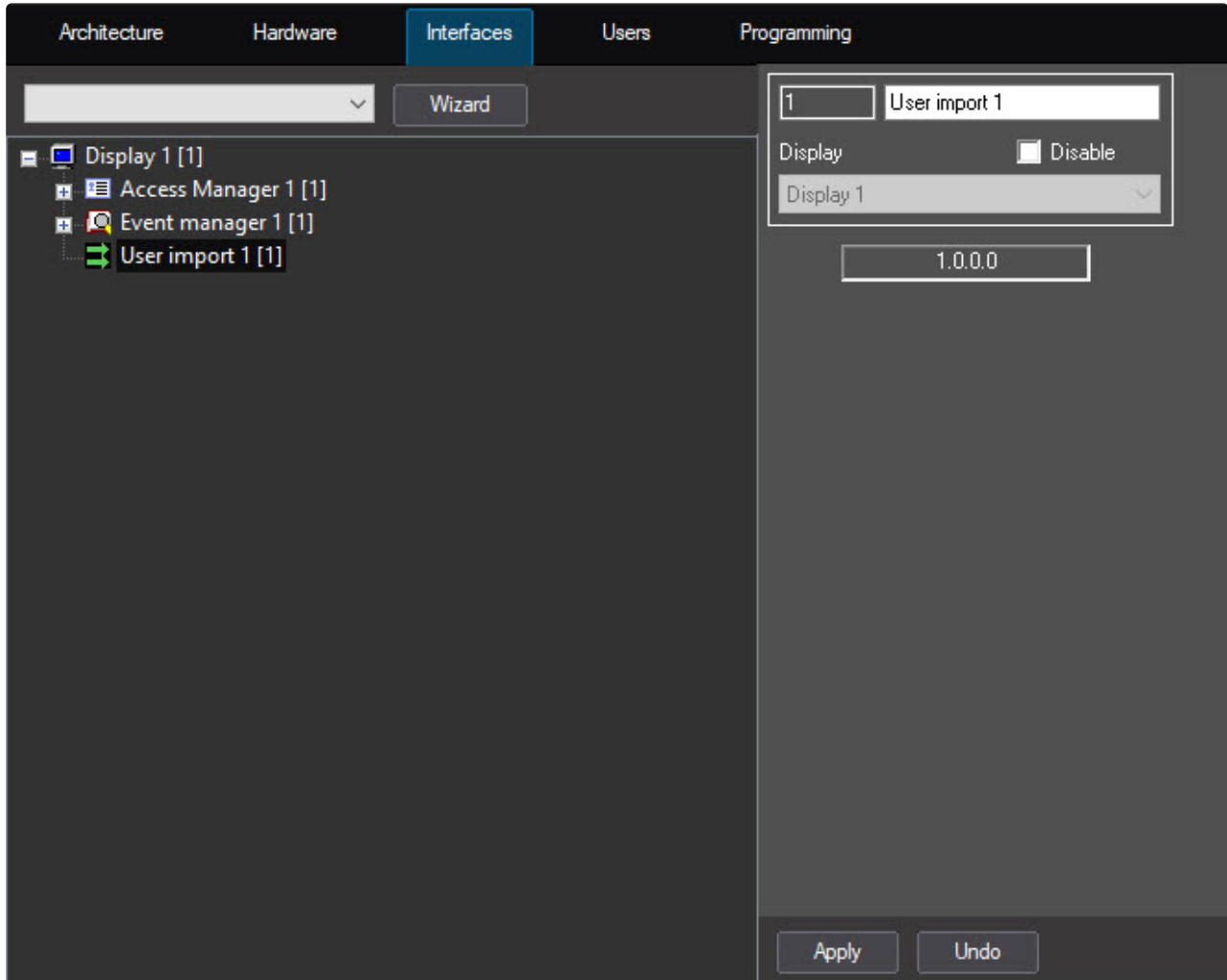
The *User import* software module is a component of the *ACFA PSIM* software package and allows importing users from table of the MS SQL database, Excel and CSV files to the database of the *ACFA PSIM* software package.

2 Licensing policy for User import

The module is licensed per 1 object.

3 Activation of the User import software module

To activate the *User import* software module create the **User import** object on the basis of the **Display** object on the **Interfaces** tab of the **System settings** dialog window.



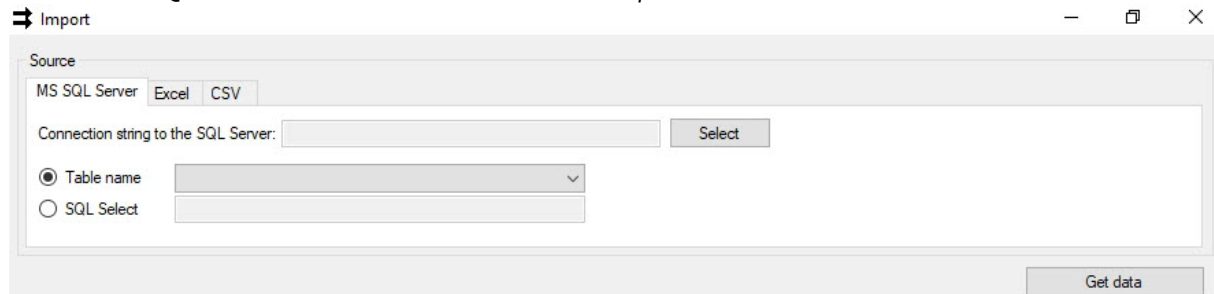
4 Working with User import module

4.1 Select a data source

4.1.1 Select a data source for users importing from external database

To select a data source for users importing from external database, do the following:

1. Go to the **MS SQL Server** tab in the window of the *User import* software module.



2. Click the **Select** button.
As a result the dialog window of connection configuring to the MS SQL Server will be displayed.

Connection Properties

Data source: Microsoft SQL Server (SqlClient) Change...

Server name: TAG-5962\SQLEXPRESS Refresh

Log on to the server

Use Windows Authentication

Use SQL Server Authentication

User name:

Password:

Save my password

Connect to a database

Select or enter a database name:

psim

Attach a database file:

Browse...

Logical name:

Advanced...

Test Connection OK Cancel

- a. Click the **Change** button.
 - i. In the opened window from the **Data provider** drop-down list select the provider of connected data.

Change Data Source

Data source:

Microsoft SQL Server

Description

Use this selection to connect to Microsoft SQL Server 2005 or above using the .NET Framework Data Provider for SQL Server.

Data provider:

.NET Framework Data Provider for SQL Server

Always use this selection

OK Cancel

- ii. Set the **Always use this selection** checkbox if it's required to use the selected value permanently.

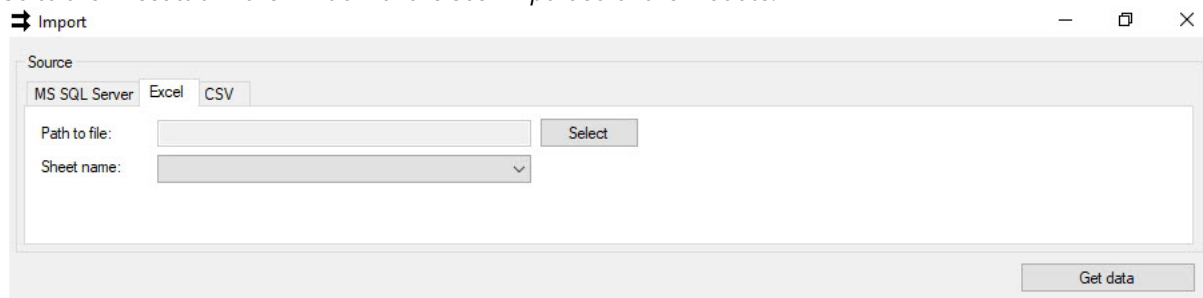
- iii. Click **OK** button to confirm.
 - b. As a result the selected data source will be displayed in the **Data source** field. From the **Server name:** drop-down list select the name of server.
 - c. To connect to local server set the switch to the **Use Windows Authentication** position if this authentication type is allowed in the SQL database settings.
 - d. While configuring connection to database stored on another server, set the switch to the **Use SQL Server Authentication** position and specify user name and password in the corresponding fields.
 - e. From the **Select or enter a database name** drop-down list select the required database.
 - f. Click the **Test connection** button to test the connection.
 - g. In case of successful test click **OK** button.
3. As a result of these operations selected data will be displayed in the **Connection string to the SQL Server** field.
 4. Set the switch to the **Table name** position to import data from the specified table of the database.
 5. To get data by SQL request set the switch to the **SQL Select** position and enter the corresponding request.

Selecting a data source for users importing from external database is completed.

4.1.2 Select a data source for users importing from Excel file

To select a data source for users importing from Excel file, do the following:

1. Go to the **Excel** tab in the window of the *User import* software module.



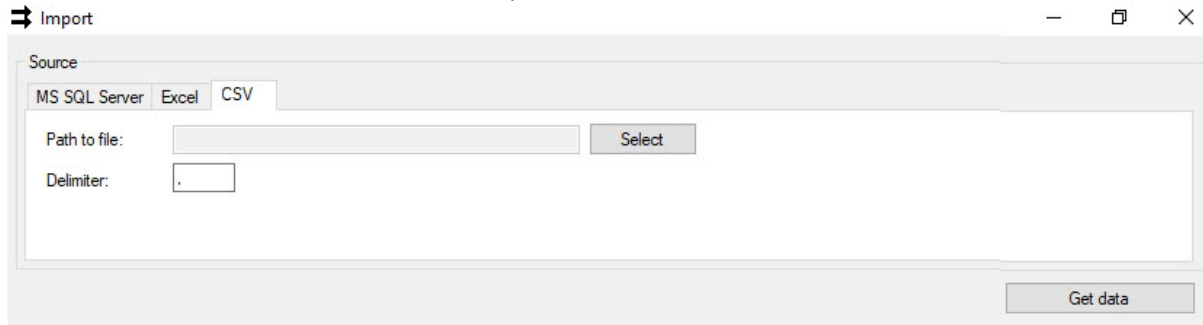
2. Click the **Select** button.
As a result the standard dialog window for a file selection will display. Select a file in the .xlsx format from which import is to be performed.
3. As a result path to the selected file will display in the **Path to file** field.
4. From the **Sheet name** drop-down list select name of sheet from which data is to be imported.

Selecting a data source for users importing from Excel file is completed.

4.1.3 Select a data source for users importing from CSV file

To select a data source for users importing from CSV file, do the following:

1. Go to the **CSV** tab in the window of the *User import* software module.



2. Click the **Select** button.
As a result the standard dialog window for a file selection will display. Select a file in the .csv format from which import is to be performed.
3. As a result path to the selected file will display in the **Path to file** field.
4. Specify delimiter in the corresponding field. On default the "," sign is a delimiter.

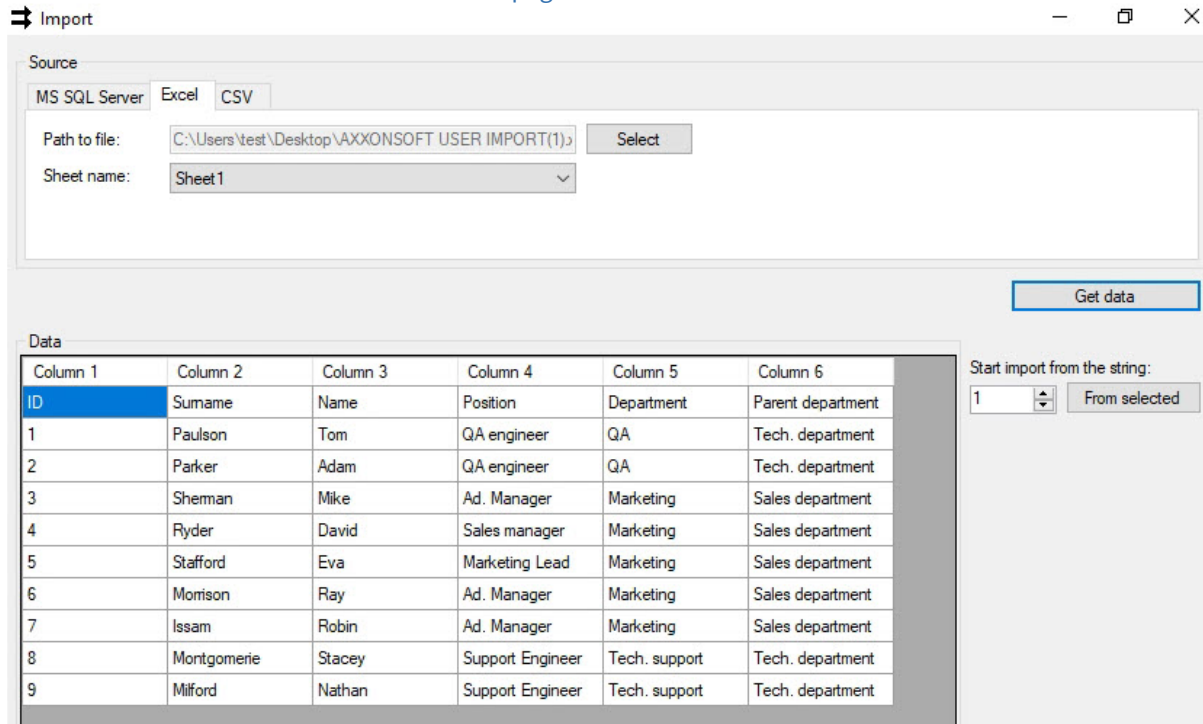
⚠ Attention!
Data in CSV file is to be in UTF-16 coding for correct data importing.

Selecting a data source for users importing from CSV file is completed.

4.2 Select data for importing

To select data for importing in the *User import* software module, do the following:

1. When the corresponding data source is selected click the **Get data** in the window of the *User import* software module. How to select data source see [on this page](#).



2. As a result data from the corresponding data source will be read and displayed in the **Data** table.

3. In the **Start import from the string:** field specify number of line from which import is to be started.
4. Number of selected line in the **Data** table will be displayed in the **Start import from the string** field while clicking the **From selected** button.

Selecting data for importing is completed.

4.3 Specify rules of department importing

To specify rules for department importing, do the following:

1. Go to the **Rules of department importing** section in the *User import* software module.

The screenshot shows the 'Import' software module interface. The 'Source' section is set to 'Excel' with the file path 'C:\Users\test\Desktop\AXXONSOFT USER IMPORT(1)' and sheet name 'Sheet1'. The 'Data' table contains 9 rows of user data. The 'Rules of department importing' section is active, showing a table with 'Department parameter' and 'Column number or value' columns. The 'Rules of importing' section is also visible, showing a list of user parameters to be imported.

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
ID	Surname	Name	Position	Department	Parent department
1	Paulson	Tom	QA engineer	QA	Tech. department
2	Parker	Adam	QA engineer	QA	Tech. department
3	Sherman	Mike	Ad. Manager	Marketing	Sales department
4	Ryder	David	Sales manager	Marketing	Sales department
5	Stafford	Eva	Marketing Lead	Marketing	Sales department
6	Morrison	Ray	Ad. Manager	Marketing	Sales department
7	Issam	Robin	Ad. Manager	Marketing	Sales department
8	Montgomerie	Stacey	Support Engineer	Tech. support	Tech. department
9	Miford	Nathan	Support Engineer	Tech. support	Tech. department

Department parameter	Column number or value
Name	Column 5
External ID	Column 5
External ID of parent department	Column 6

User parameter	Column number or value
External ID	
Surname	
Name	
Patronymic	
Card number	
Object code	
PIN	
Access level	
Block	
APB	
Expiry date	
Position	

2. Parameters of department in the *ACFA PSIM* software package are specified in the **Department parameter** column.
3. From the **Column number or value** drop-down list select the corresponding column from the **Data** table for each parameter of department.

Attention!

Name and **External ID** fields are required.

Specifying rules for department importing is completed.

4.4 Specify rules of user importing

To specify rules for user importing, do the following:

1. Go to the **Rules of importing** section in the *User import* software module.

Import

Source

MS SQL Server Excel CSV

Path to file: C:\Users\Nest\Desktop\AXXONSOFT USER IMPORT(1).xlsx Select

Sheet name: Sheet1

Get data

Data

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
ID	Surname	Name	Position	Department	Parent department
1	Paulson	Tom	QA engineer	QA	Tech. department
2	Parker	Adam	QA engineer	QA	Tech. department
3	Sherman	Mike	Ad. Manager	Marketing	Sales department
4	Ryder	David	Sales manager	Marketing	Sales department
5	Stafford	Eva	Marketing Lead	Marketing	Sales department
6	Monison	Ray	Ad. Manager	Marketing	Sales department
7	Issam	Robin	Ad. Manager	Marketing	Sales department
8	Montgomerie	Stacey	Support Engineer	Tech. support	Tech. department
9	Milford	Nathan	Support Engineer	Tech. support	Tech. department

Start import from the string: 1 From selected

Rules of department importing

Department parameter	Column number or value
Name	Column 5
External ID	Column 5
External ID of parent department	Column 6

Rules of importing

User parameter	Column number or value
External ID	
Surname	Column 2
Name	Column 3
Patronymic	
Card number	
Object code	
PIN	
Access level	
Block	
APB	
Expiry date	
Position	Column 4

Import Cancel last import

2. Parameters of user in the *ACFA PSIM* software package are specified in the **User parameter** column.
3. From the **Column number or value** drop-down list select the corresponding column from the **Data** table for each parameter of user.

⚠ Attention!

Surname field is required.

⚠ Attention!

Columns of the BLOB type from the **Data** table are specified for the **Photo** parameter. Import of photos is not supported if data source is not MS SQL Server.

Specifying rules for user importing is completed.

4.5 Start of user importing process

After setting parameters it's required to start user importing process. To start the import process click the **Import** button.

➔ Import

Source

MS SQL Server Excel CSV

Path to file: C:\Users\test\Desktop\AXXONSOFT USER IMPORT(1).xlsx Select

Sheet name: Sheet1

Get data

Data

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
ID	Surname	Name	Position	Department	Parent department
1	Paulson	Tom	QA engineer	QA	Tech. department
2	Parker	Adam	QA engineer	QA	Tech. department
3	Sherman	Mike	Ad. Manager	Marketing	Sales department
4	Ryder	David	Sales manager	Marketing	Sales department
5	Stafford	Eva	Marketing Lead	Marketing	Sales department
6	Momison	Ray	Ad. Manager	Marketing	Sales department
7	Issam	Robin	Ad. Manager	Marketing	Sales department
8	Montgomerie	Stacey	Support Engineer	Tech. support	Tech. department
9	Milford	Nathan	Support Engineer	Tech. support	Tech. department

Start import from the string: 1 From selected

Rules of department importing

Department parameter	Column number or value
Name	Column 5
External ID	Column 5
External ID of parent department	Column 6

Rules of importing

User parameter	Column number or value
External ID	
Surname	Column 2
Name	Column 3
Patronymic	
Card number	
Object code	
PIN	
Access level	
Block	
APB	
Expiry date	
Position	Column 4

Import Cancel last import

In case of successful importing the confirmation message with number of imported users will display.



Import of users is successfully completed.
10 users imported.

OK

As a result the departments tree including parent and subsidiary departments with users assigned to them will be imported to the ACFA PSIM software package.

To remove users imported by last successful import click the **Cancel last import** button.



Results of the last import are canceled.
10 users deleted.

OK