

AN1011 - Importing and exporting Net2 user data

User data

User data in Net2 is all of the information the system holds about an individual cardholder. This ranges from their name and address to the number of their individual Net2 card. Often this information already exists in other databases owned by the end user. It is possible to import this existing data into Net2. This can save many hours of administration time when a large system is first being installed. Net2 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 software packages including Microsoft Access and Excel.

Producing a file for import

When producing a file for import into Net2 it is important for the data fields to be arranged in the correct order and do NOT exceed the maximum length as shown in the table at the end of this document. Only the first two fields are required and fields can be left blank.

The screenshot below shows how a CSV file can be produced in Microsoft Excel. The first line can contain the field names, as Net2 is able to ignore them. Any field that is to be left blank must be included so that the rest of the fields remain in their correct locations.

	A	B	C	D	E	F	G
1	Surname	First name	Middle name	Card NO	PIN	Department	
2	Scott	Mike		15894458	9856	Managers	
3	Jones	Sarah		65847592	4562	Sales	
4	Brown	Caroline		25643852	4257	Sales	
5	Smith	James		91569854	3256	Production	
6	O'Brien	John		49685245	1254	Production	
7							
8							

The file must be saved in the .csv format it can then be viewed in a text format, which shows the comma separators. The picture below shows the same file viewed in a text format. Note how the blank fields are shown by two commas with nothing in between them.

```

Surname,First name,Middle name,Card NO,PIN,Department
Scott,Mike,,15894458,9856,Managers
Jones,Sarah,,65847592,4562,sales
Brown,Caroline,,25643852,4257,sales
Smith,James,,91569854,3256,Production
O'Brien,John,,49685245,1254,Production
  
```

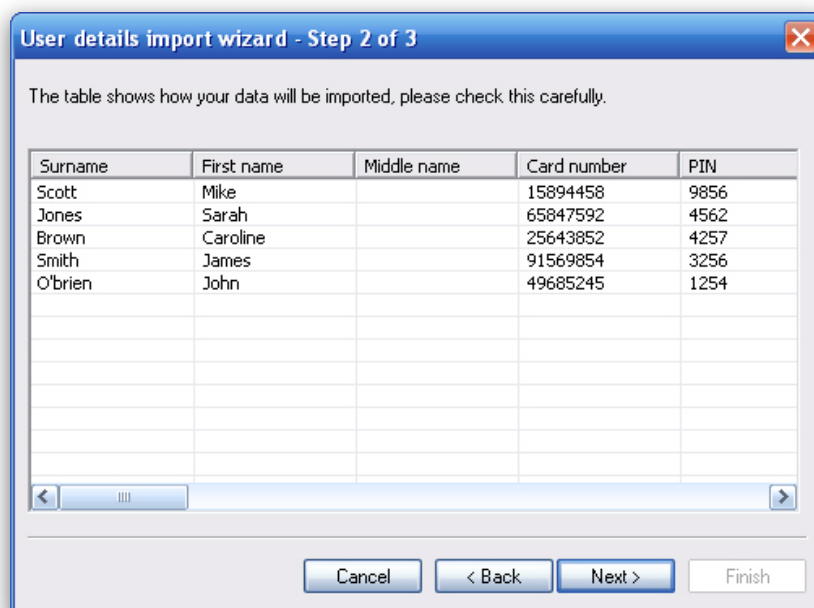
Importing the file

To import the TXT or CSV file, select the import option from the File menu. The import wizard will appear. The filename of the CSV file should be entered or browsed to in the Import filename window. Select the delimiter used in the file, comma, semi-colon or tab (In the example above commas are used). If the field names have been included on the first line of the file, as shown in the example above, the 'first row contains field names' box must be checked.

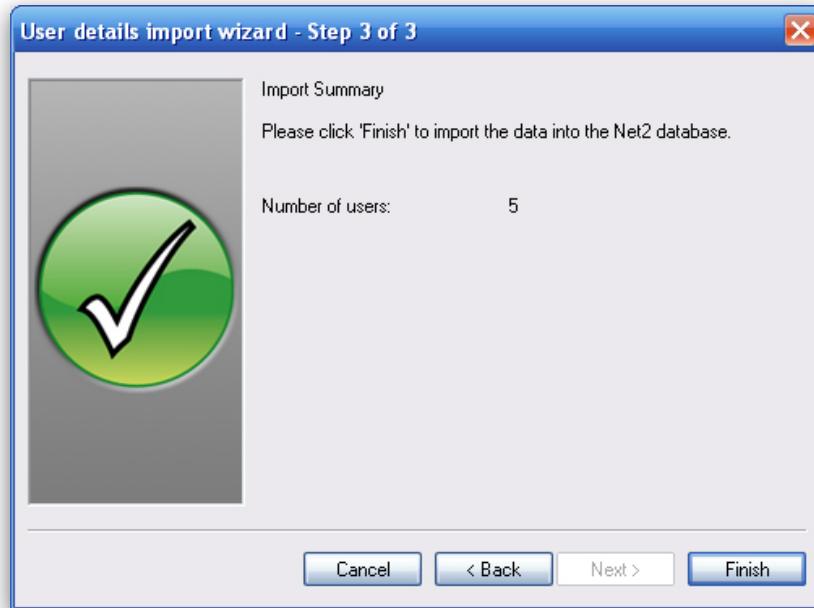
A useful feature of the import wizard is the ability to convert data entries to true text (i.e. SMITH becomes Smith). Only the fields marked with an asterisk (*) in the table at the end of this document are affected by the 'Convert to true case' option. Check the tick box if this function is required.



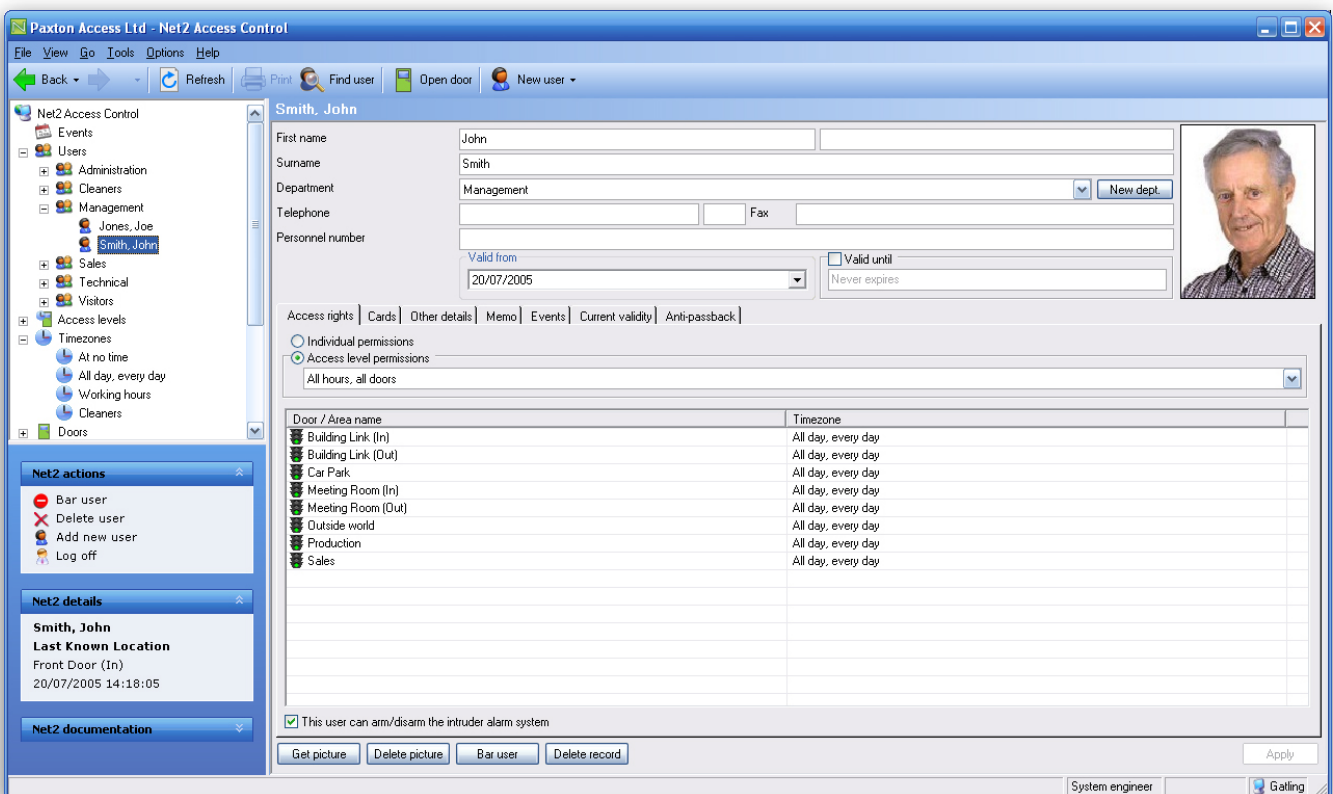
After pressing Next the data will be displayed in a table showing how it will be imported into Net2. It is important at this stage to check the information through to ensure each field is correctly located. Only when this is correct should the file be imported. Note how SMITH has changed to Smith, unfortunately O'Brien has also changed to O'brien! Names that are changed incorrectly in this way the information must be manually changed in the individual user record within the Net2 software.



Once the file import is complete you will be shown how many users have been imported. Click Finish to import the data into the Net2 database.



Once the file import is complete the information will appear under the Users section in the Net2 software. Users will be grouped by Department.



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User data field order

Field number	Net2 field name	Notes
1 *	Surname	Required - Text up to 50 characters
2 *	First name	Required - Text up to 50 characters
3 *	Middle name	Text up to 50 characters
4	Card No	Number 1 to 99999999
5	PIN	Number 1000 to 9999
6 *	Department	Text up to 50 characters
7 *	Access Level	Text up to 50 characters
8	Telephone	Text up to 30 characters
9	Extension	Text up to 10 characters
10	Fax	Text up to 30 characters
11	Active date	Date in the default language format e.g. in the UK it is dd/mm/yyyy
12	Expiry date	Date in the default language format e.g. in the UK it is dd/mm/yyyy
13 *	Field1_100 (Address 1)	Default field name shown in brackets. Text up to 100 characters
14 *	Field2_100 (Address 2)	Text up to 100 characters
15 *	Field3_50 (Town)	Text up to 50 characters
16 *	Field4_50 (County)	Text up to 50 characters
17	Field5_50 (Post code)	Text up to 50 characters
18	Field6_50 (Home telephone)	Text up to 50 characters
19	Field7_50 (Home fax)	Text up to 50 characters
20	Field8_50 (Mobile)	Text up to 50 characters
21	Field9_50 (Email)	Text up to 50 characters
22 *	Field10_50 (Position)	Text up to 50 characters
23	Field11_50 (Start date)	Text up to 50 characters
24	Field12_50 (Car registration)	Text up to 50 characters
25 *	Field13_Memo (Notes)	Text up to 65535 characters (cannot contain field separator).
26	Field14_50 (Personnel number)	Text up to 50 characters

Fields marked with an asterisk (*) are affected by the 'Convert to true case' option during the import.

Additional Imports

If further imports are required, the same process can be followed again, it is important however, not to include any duplicate records in the new import file, as Net2 will reject these.

Export

The Export feature can be accessed from the drop down File menu at the top of the screen. This allows all user details to be exported in a .csv format to any destination that you specify. The layout of the file is the same as that detailed in the table above.

NOTE: If exporting user data from one Net2 system to another Net2 database, be careful not to overwrite any existing users with duplicate UserIDs. The simplest way to ensure this is to delete the UserID column in the .csv file (Column AA) before the import and new IDs will be created for these users in the new database.

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