# Basic Card Import (CSV) – SG Import Utility

This topic covers the basic steps to import new cards/cardholders from a CSV Conversion File into a blank SysGal database using the SG Import Utility.

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| 👁 | See **System Galaxy User Guide** for more about data formats and import capabilities not covered in this QRS |
| ⓘ | See prerequisites and stipulations on the back page for creating the CSV *Source Data Conversion File*\*. |
| 💣 | Before you execute an import, perform a database backup of SysGal databases to preserve any programming. |

## Create the Conversion File

1. Obtain a *Source Data Conversion File* (.CSV format) from the end-user's existing system or DBA.

   ✱ (recommended) the *Conversion File* should have a *valid header row* to prevent dropping data.

   **Example of a CSV conversion file in comma-delimited format.**



2. Copy the *Data Conversion File* (CSV) into an appropriate folder location\*.

   ✱ (recommended) Create a folder where you will have access when you start the import – such as
   C:\\GCS\System Galaxy\**SG-Import**\SG_Import.csv   *– or other local/network folder.*

## Create the ODBC Data Source for the Conversion File

This describes how to define an Import ODBC DSN Name and attach the appropriate Microsoft driver.

1. Browse to/Open the **ODBC Data Source Administrator** (32bit required).
   (You can find it by typing *Administrative Tools* into the search field on Windows Taskbar. )

2. Select the **System DSN tab** and click the **Add button** to open the *Create New Data Source* dialog.
   (you should see your SysGal ODBC DSN's already listed.)

3.   Select (highlight) the **"Microsoft Text Driver"** in the listview.
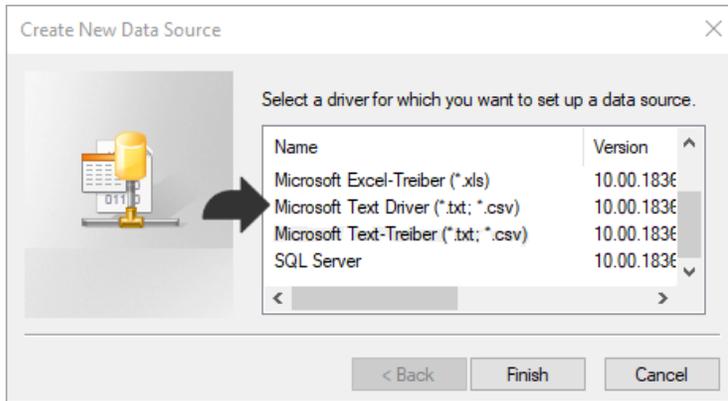


4.   Click the **Finish** button. **(**This will open the *ODBC Text Setup* dialog).

5.   Type a **Name** and **Description.**  Uncheck '**Use Current Directory**' and click **[Select Directory]** button.
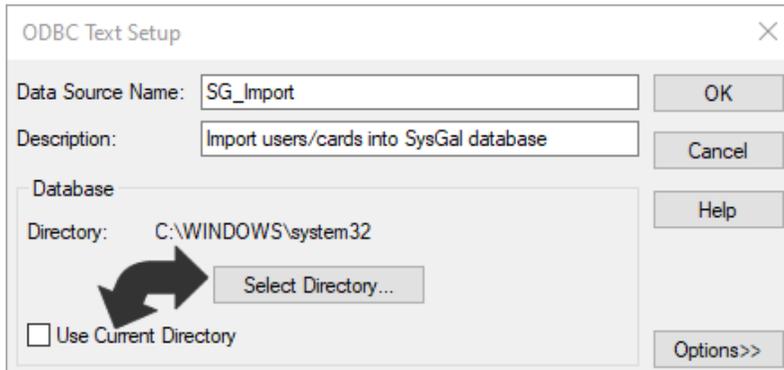


6.   **Select the directory** where the *Conversion File* is stored and click **OK button** to save the path.
     (the *Conversion File* should appear in the listview when you choose the folder.)
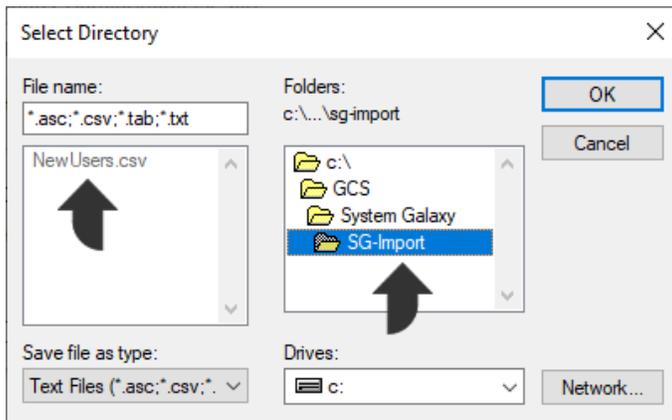
7. When you return to the *ODBC Text Setup* screen, the new directory path will display.)

8. Click the **OK button** to exit the *ODBC Text Setup* screen.

9. You should see the **SG_Import ODBC Data Source** listed with the *Microsoft Text Driver* attached. Click **OK button** to exit.
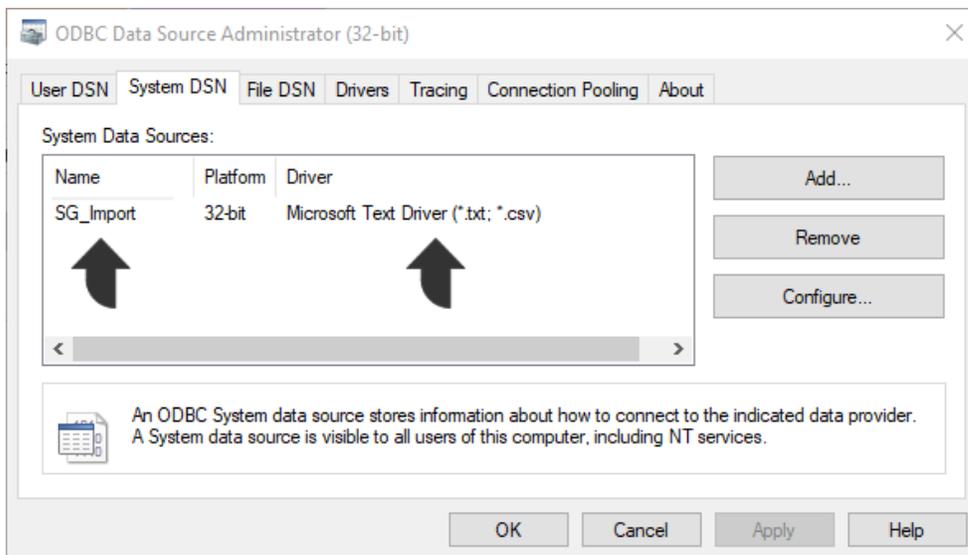
## Launch the SG Import Utility and Connect to the SysGal Database.

The **Card Import Utility** must be connected to the **SysGal Data Source** before you can import users/cards.

1. Launch the **SG Import Utility** by double-clicking the SG-Import.exe file
   (located in the **C:\GCS\System Galaxy\Utilities** folder)

   a. select **File** > **Connect** from the SG Import menu.

   b. select the **Machine Data Source tab** (you should see the SysGal DSN listed)

   c. Select (highlight) the **SysGal DSN name** and click **OK button** (opens SQL Server Login window).
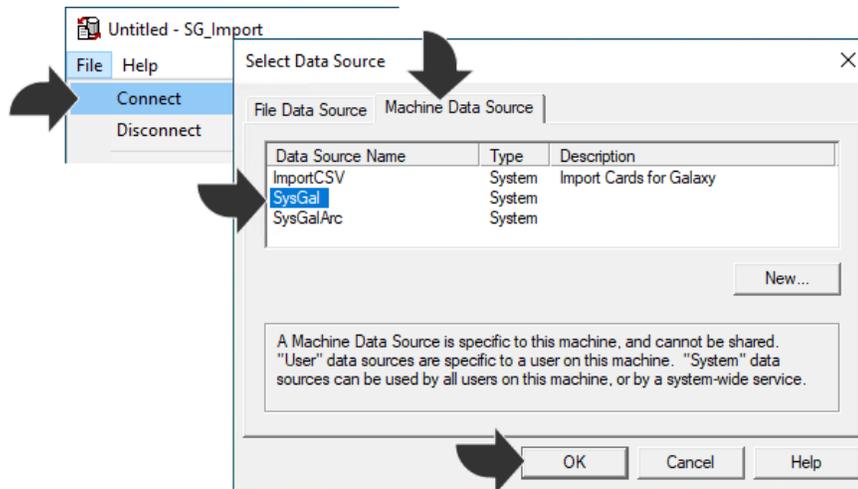


2. Enter the **valid password** for the SysGal database login and click **OK button**.
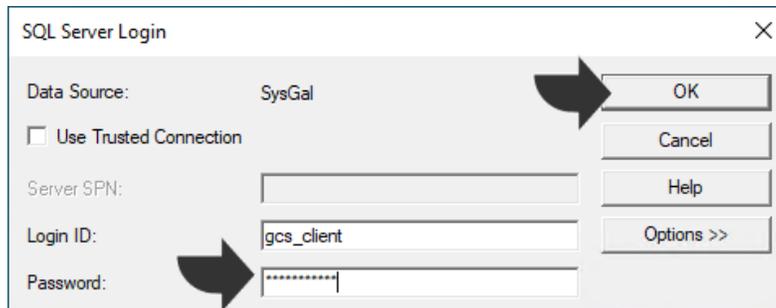


3. Now you are logged into the SysGal database and ready to create the *Import Card Profile*.

## Set up the Data Import Profile for the CSV file

These steps visit the basic fields for importing a CSV Conversion File.  See the *Software User Guide* for more.

1. Open the **Import Card Data** screen from the menu after you have connected to the SysGal database
   a) Select **File > Edit Profile** from the menu to open the *Import Card Data* screen.
   b) In the **[Import from Data Source]** droplist, choose your **Import ODBC Data Source**.
   c) In the **[Select Table to Import From]** droplist, select your *Data Conversion File.*
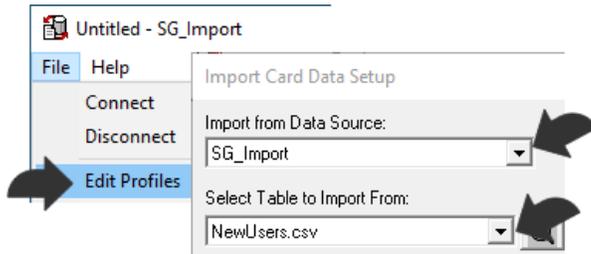


2. Clicking the **[Magnifying Glass] button**  opens a preview pane of the first few rows of the data file.



3. (optional) In the **[Default Access Profile] droplist,** select the *Access Profile Name* that you already added in System Galaxy. – see the SG Software User Guide for instructions on creating Access Profiles.

   TIP: This access profile will be assigned to all the cardholders in your import. You can change them later through the System Galaxy software.

4. In the **[Specify Card Format] droplist,** select the type of card format – such as '26-Bit Wiegand'.

5. The **Data Mapping Listview** shows 2 columns (i.e. **System Galaxy Columns** and **Import Source Columns**). Be careful to map each column correctly. Incorrect mapping can cause total or partial failure to import.

   a) In the **System Galaxy Column**, click on the **Column_Name** that you want to map.
      (An empty droplist will appear in the Import Source Column).
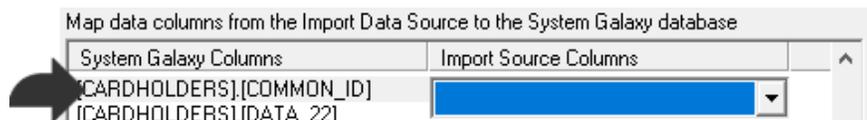
   b) In the **Import Source Column**, select the corresponding **Column_Name** from your Conversion File that you want to map to the System Galaxy column_name that you selected in step-a.
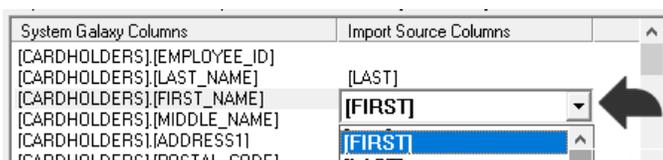
      TIP: Press *<Tab> keyboard key* to escape each droplist without disturbing your selection. This prevents unintentionally changing a setting in the droplist while you scroll the list to find the next column.

   c) **Continue mapping each Column_Name to the appropriate SG column.**

6. Click **Import Now** button.

7. When prompted enter a **File Name** for the Import profile.
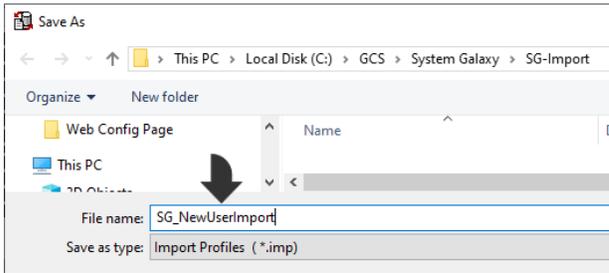


8. Click **SAVE button** to execute the import procedure.
   (the Log File will display the import results, including how many successful transactions, as well as how many cardholders and cards were inserted into the SysGal database.)
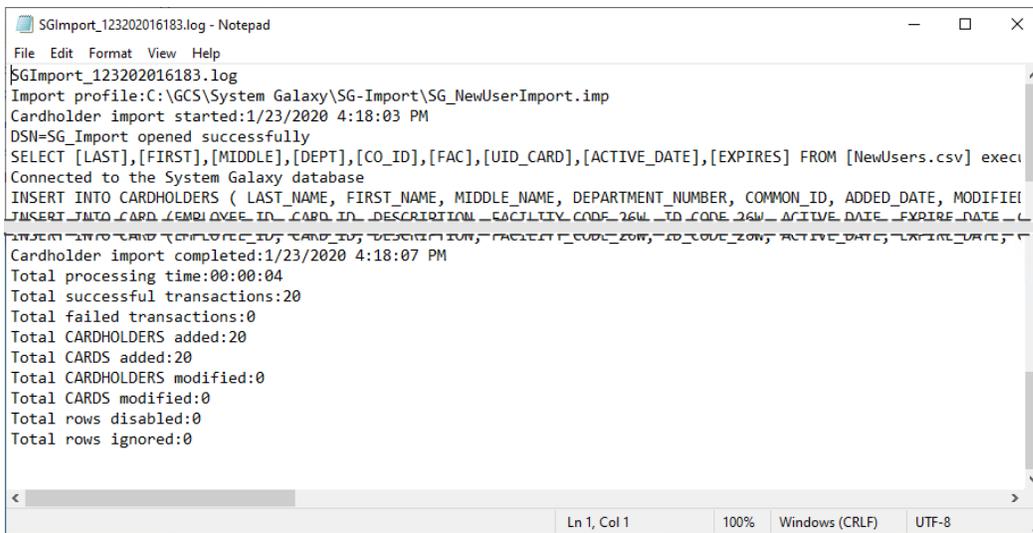


9. You can sign-in to *System Galaxy* and view the cardholders appear in the *Cardholder* screen with all data present that you imported.
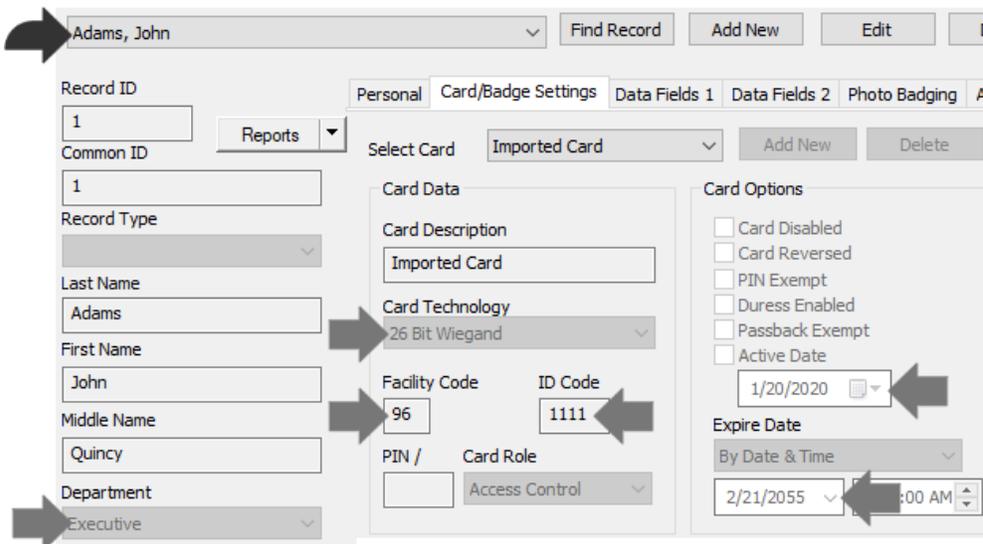
## Import Prerequisites for the CSV file

These requirements are based on using a comma-delimited CSV conversion file for importing new users in a new System Galaxy database that has minimal programming. *Contact authorized technical support as needed.*

1. System Galaxy has a 14-day grace period to import Cards and Cardholders before license registration.

2. You need a valid login to the SysGal database to connect the Import Utility.

3. The *Card Import Utility* will not import records that have duplicate card codes, or unique id's.

4. Any individual columns that contain invalid data (out of range, etc.) might not be imported during the *Card Import Process,* even if the primary data is imported and a cardholder or card is created; thereby leaving the offending field unset in System Galaxy. Results will be in the import Log File.

5. The *conversion file* must obey valid, SQL-compliant formatting ...
   ‣ Must include a header row
   ‣ Column_Names must be SQL-compliant
      » cannot include spaces
      » cannot include special/reserved characters (quotes, tics, hyphens, etc.).
   ‣ Must use the correct formatting for *data-types* and value separators – such as integers, dates, or date/time. A solidus (/) is not a valid date separator in SQL.
      » YYYY-MM-DD (no spaces; use hypens for date separators; no tics or quotes;)
      » YYYY-MM-DD hh:mm:ss (use hypens for date separators; use colons for time separators; one space between the date and time; no tics or quotes;)