

Enterprise Data Interface

Introduction

Enterprise Data Interface imports Cardholder details from an external source file or database into Gallagher Command Centre.

Interfaces can be configured to add, update or remove Cardholders in Command Centre. In order to configure an interface, fields from the source file must be mapped to relative fields in Command Centre. Once configured, an interface can be run either manually (at any time) or based on a schedule.

Licensing

Scheduled EDI is a licenced feature of Command Centre.

A Secondary option is available in the form of a Customisation called Bookable Resources. Bookable Resources allows the booking of resources such as Classrooms with their associated features, i.e. air conditioning and lighting, to be imported from an external Databases (Booking Management System) or file. A system commonly interfaced with, in this way is Syllabus Plus. Bookable Resources require different Licence entries to EDI and they are:

[Limits]

Bookable Resource=X – X is the number of items that the licence allows you to create

[Features]

EDI-BookingDatabase=1 – This entry is required if the import using EDI is from a Database

EDI-BookingFile=1 – This entry is required if the import is using EDI is from a File

[Customisations]

BookableResource=1

Operator Privileges

EDI is not covered in the “Advanced User” privilege and as such requires two additional privileges to be added to any Operator Group that wishes to perform this action, they are:

- “Edit Enterprise Data Interface” – Allows the Operator to create, edit and delete Enterprise Data Interfaces

And

- “Run Enterprise Data Interface” – Allows the Operator to manually request Enterprise Data Interfaces to start processing

No other privileges will enable the EDI features.

The Run as Operator

When an interface is run, it is run under an Operator's name. This Operator is referred to as the "Run as Operator". All actions performed by the interface are logged under this Operator's name.

The Run as Operator will require the following privileges:

- Edit Cardholders to create/edit cardholders
- Edit Cardholder Notes to create/edit cardholder notes
- Delete Cardholders to delete cardholders
- Modify Access Control to set cardholder access groups
- View Site to view competencies
- Edit Enterprise Data Interface

The nature and the use of this Operator is going to vary, depending on each sites requirements but generally it is better to have an Operator that will not change i.e. A generic Operator such as 'EDI' or 'Import' for example.

That way the importing of information is not associated to a specific person.

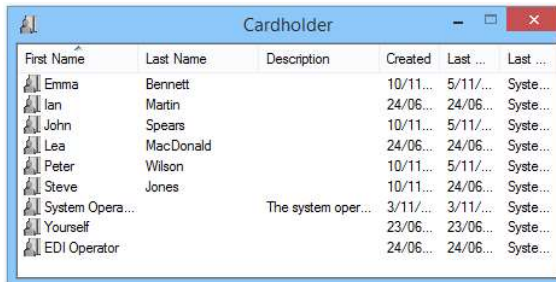
Creating the Run as Operator

Introduction

Universities can use EDI in two different ways, one as a Cardholder import and the other as a Bookable Resources import. The standard version of EDI is a Cardholder import and that is what we are going to be configuring in this scenario. EDI can be an essential part of the enrolment process for Students, importing large volumes of data quickly and easily. Once the initial setup is completed it is simply a case of creating a new source file, assuming the configured options will not change.

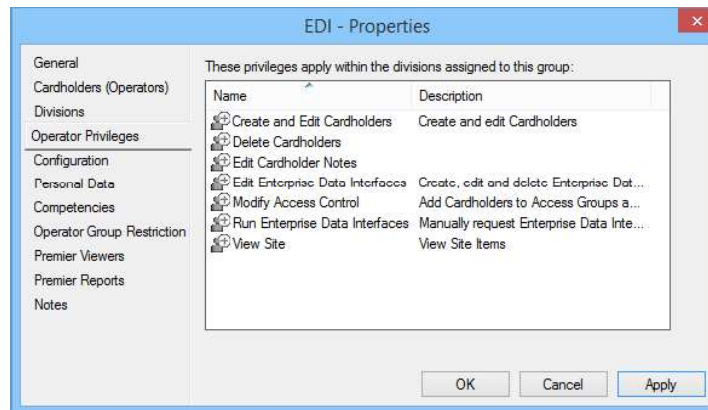
Procedure

1. From the Menu bar click **Manage...Cardholders**
2. Right click **New...Cardholder**
3. Named...**EDI Operator**



First Name	Last Name	Description	Created	Last ...	Last ...
Emma	Bennett		10/11...	5/11/...	Syste...
Ian	Martin		24/06...	24/06...	Syste...
John	Spears		10/11...	5/11/...	Syste...
Lea	MacDonald		24/06...	24/06...	Syste...
Peter	Wilson		10/11...	5/11/...	Syste...
Steve	Jones		10/11...	24/06...	Syste...
System Opera...		The system oper...	3/11/...	3/11/...	Syste...
Yourself			23/06...	23/06...	Syste...
EDI Operator			24/06...	24/06...	Syste...

4. Create a New Operator Group called **EDI**
5. Add the following Operator Privileges to the **EDI** Operator Group
 - **Create and Edit Cardholders**
 - **Delete Cardholders**
 - **Edit Cardholder Notes**
 - **Edit Enterprise Data Interface**
 - **Modify Access Control**
 - **Run Enterprise Data Interfaces**
 - **View Site**





Note

If the Operator Group has permissions across multiple Divisions, ensure that they configured correctly.

6. Add the **EDI Operator** Cardholder to the Operator Group

The screenshot shows the 'EDI - Properties' dialog box with the 'Cardholders (Operators)' tab selected. The left sidebar lists various configuration options: General, Cardholders (Operators), Divisions, Operator Privileges, Configuration, Personal Data, Competencies, Operator Group Restriction, Premier Viewers, Premier Reports, and Notes. The main area displays a table with columns 'Name' and 'Description'. A single entry is visible: 'Operator, EDI'. At the bottom right, there are 'OK', 'Cancel', and 'Apply' buttons.

7. Click **Apply**
8. Open up the **EDI Operator** Cardholder properties
9. Select the **Operator Configuration** tab
10. Change the Logon Name to **EDI**

The screenshot shows the 'Operator, EDI - Properties' dialog box with the 'Operator Configuration' tab selected. The left sidebar lists various configuration options: General, Status and Overrides, Cards, Access Groups, Relationships, Personal Data, Print/Encode, Competencies, Event Notifications, Notes, User Code, Operator Configuration, Alarm Transmission, Salto Options, and History. The main area contains several settings: 'Command Centre logon' is checked; 'Logon Name' is set to 'EDI' with a 'Reset Password' button; 'Force password change at next logon' is unchecked. Below this is a section for 'Operator Group' with a table showing 'Name' and 'Description' for 'EDI'. At the bottom, 'Allow drag and drop onto an item in master list windows' is checked. 'OK', 'Cancel', and 'Apply' buttons are at the bottom right.

11. Reset the Operator Password to **Blank**
12. Click **OK**



Note

This is the Operator which will process all of the Data when an EDI is run. Any changes will be recorded under this Operator's details.

The Source File

The source file will contain the data you wish to add, update, or remove in Command Centre. This file generally originates from a third party database and should be formatted as a delimited or fixed width file.

The options for the delimiters are Comma, Tab or another character. Command Centre can also be configured to accept files with header rows.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Student ID	1st Name	Last Name	Short Name	Division	Descriptive Notes	Authorise	Use exte	Date of Birth	Start Date	Home Adc	Phone	Mobile	Email	ID Photo	Department	
2	123456	John	Smith	J Smith	Root	Full Time Engineer	YES	NO	10/12/1955	1/01/2010	15 SMITH	6478389800	2.11E+11	JSMITH@JOHN.JPG	Engineering		
3	123457	Susan	Jones	S Jones	Root	Full Time Engineer	YES	NO	15/05/1967	1/01/2010	26 JOHN A	6478389800	2.11E+11	SUSAN@SUSAN.JPG	Engineering		
4	123458	Gilroy	Day	G Day	Root	Full Time Engineer	YES	NO	20/03/1980	1/01/2010	29 1ST AVI	6478389800	2.11E+11	GDAY@G Gilroy.JPG	Engineering		
5	123459	Page	Turn	P Turn	Root	Full Time Engineer	YES	NO	27/08/1981	1/01/2010	800 HIGHV	6478389800	2.11E+11	PTURN@CPAGE.JPG	Engineering		
6	123460	Ian	King	I King	Root	Full Time Engineer	YES	NO	31/12/1989	1/01/2010	87 HOME I	6478389800	2.11E+11	IANKING@IAN.JPG	Engineering		
7	123461	Dusty	Martin	D Martin	Root	Full Time Engineer	YES	NO	7/03/1987	1/01/2010	55 DENG Y	6478389800	2.11E+11	DUSTYMA DUSTY.JPG	Engineering		
8	123462	Aaron	Watts	A Watts	Root	Full Time Engineer	YES	NO	11/05/1990	1/01/2010	76 WAKE	6478389800	2.11E+11	AWATTS@AARON.JPG	Engineering		
9	123463	Adrian	Dickson	A Dickson	Root	Full Time Engineer	YES	NO	17/04/1987	1/01/2010	34 LEASE F	6478389800	2.11E+11	ADICKSON-ADRIAN.JPG	Engineering		
10	123464	Alison	Butler	A Butler	Root	Full Time Engineer	YES	NO	9/04/1980	1/01/2010	FLAT 2 VIC	6478389800	2.11E+11	ALISONBLA ALISON.JPG	Engineering		
11	123465	Anna	Samway	A Samway	Root	Full Time Engineer	YES	NO	16/03/1975	3/01/2010	33 SEDDO	6478389800	2.11E+11	ANNASAA ANNA.JPG	Engineering		
12	123466	Andy	Clarke	A Clarke	Root	Full Time Engineer	YES	NO	14/06/1981	3/01/2010	98 AUSTRI	6478389800	2.11E+11	ANDYCLAI ANDY.JPG	Engineering		
13	123467	Ben	Hume	B Hume	Root	Full Time Engineer	YES	NO	30/04/1971	3/01/2010	345 RIVER	6478389800	2.11E+11	BENHUME BEN.JPG	Engineering		
14	123468	Clinton	Colyer	C Colyer	Root	Full Time Engineer	YES	NO	16/10/1990	3/01/2010	22 DWIG D	6478389800	2.11E+11	CCOLYER@CLINTON.JPG	Engineering		
15	123469	Brian	Harris	B Harris	Root	Full Time Engineer	YES	NO	27/05/1989	3/01/2010	78 WELLIN	6478389800	2.11E+11	BRIANHA B BRIAN.JPG	Engineering		
16	123470	Clinton	Karns	C Karns	Root	Full Time Engineer	YES	NO	23/12/1969	3/01/2010	53 SELBY R	6478389800	2.11E+11	CLINTONK CLINTON.JPG	Engineering		
17	123471	Marc	Hamilton	M Hamilton	Root	Full Time Engineer	YES	NO	6/04/1980	3/01/2010	87 ACCESS	6478389800	2.11E+11	MARCHAA MARC.JPG	Engineering		
18	123472	Dale	Williams	D William	Root	Full Time Engineer	YES	NO	20/09/1976	3/01/2010	73 EQUINI	6478389800	2.11E+11	DALEWILL DALE.JPG	Engineering		
19	123473	Dawn	Pearce	D Pearce	Root	Full Time Engineer	YES	NO	21/04/1978	3/01/2010	123 ESTUA	6478389800	2.11E+11	DAWNPE/DAWN.JPG	Engineering		
20	123474	Debbie	Murphy	D Murphy	Root	Full Time WORKS	IN YES	YES	15/05/1975	3/01/2010	90 HORSE	6478389800	2.11E+11	DEBBIEML DEBBIE.JPG	Engineering		
21	123475	Derek	Maddern	D Madder	Root	Full Time WORKS	IN YES	NO	2/05/1990	3/01/2010	49 KING S	6478389800	2.11E+11	DEREK MA derek.JPG	Engineering		

Above is an example of a Comma delimited file with a header row.

There are 21 Cardholder Records in this file.

The fields along the top will be associated to a relative field in Command Centre so that the data comes across accurately.

The "Student ID" field is the unique identifier. A Unique ID field is required when importing the information into Command Centre as this is how the system references the Cardholders to associate the information to.



Enterprise Data Interface Folders

EDI requires a number of folders to be created on the Command Centre Server or a Network Share Location

If you are using Local File Location, i.e. your folders are on the Command Centre Server, you will need to create the following Folders.

- Source Folder - This is where the source data file will be retrieved when the EDI is running.
- Completed Folder - The processed source data file will be moved to this folder and renamed when the EDI has completed.
- Failed Folder - If EDI fails to process the Source Data File, the file will be moved to this folder.
- Image Folder - EDI will look for matching Images in this folder when it is running.
- File Name – This is the name of the Source File, this is case sensitive and must be correct for example "Import.csv".

A network location can also be used

UNC Paths can be used in the following format:

\\server\sharename\filename

The screenshot shows the 'Configure Enterprise Data Interface' window. The 'Location type' is set to 'Network Share'. The 'Details' section includes a 'File name' field and a 'Network credentials to use if not specified below' section with 'Username' and 'Password' fields. Below this, there are four sections for folder paths: 'Source folder', 'Completed folder', 'Failed folder', and 'Image folder'. Each section has a 'Logon with' checkbox and fields for 'Username' and 'Password'. The 'Save' and 'Cancel' buttons are at the bottom.

You will need to specify a User Name and Password for all folders either globally or individual Logons to each folder and ensure that you have access to the remote servers/folders with the correct file access permissions.

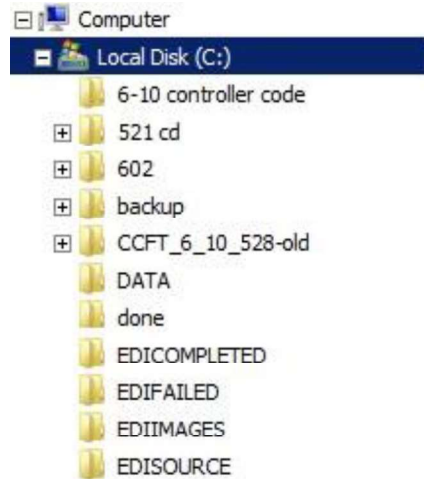
EDI also has the options to specify an import straight from a database – for further information and version compatibility please see the EDI release note

The screenshot shows the 'Configure Enterprise Data Interface' window with 'Location type' set to 'Database'. The 'Details' section includes a 'Database Type' dropdown (set to 'Oracle'), 'Server', 'Username', 'Password', 'Database Name', 'Data Source Name', 'Image Folder', and 'Log Folder' fields. There is a 'Test Connection' button next to the 'Password' field. At the bottom, there is a 'Processing Stored Procedures (Optional)' section with two dropdown menus: 'Before processing, execute:' and 'At the end of processing, execute:'. The 'Save' and 'Cancel' buttons are at the bottom.

Create Local File Locations on the Server

Procedure

1. Create a New Folder on your C:\Drive called **EDISource**
2. Create a New Folder on your C:\Drive called **EDICompleted**
3. Create a New Folder on your C:\Drive called **EDIFailed**
4. Create a New Folder on your C:\Drive called **EDIImages**



Ensure that the folders have read and write privileges.

The file paths will be as follows:

C:\EDISOURCE\ for the source file location

C:\EDICOMPLETED\ for the completed file location

C:\FAILED\ for the failed file location

C:\IMAGES\ for the Image Location

5. Copy your EDI Source data into the newly created **EDISource** Folder
6. Copy your EDI Source Images into the newly created **EDIImages** Folder

Note

You need to copy source data and source images into these folders each time you want to run the EDI.



Information Only

Importing Images with EDI

Cardholder Images can be imported into Command Centre and could be a photo, logo or a scanned signature.

EDI imports Cardholder Images by matching the image name in the Source file with the Image name in the Image folder. If a match is successful the image is imported.

When an image is imported it is moved from the Image folder location to the Completed folder location. When it is moved to the Completed folder any other existing files that have the same name will be overwritten.

If the Source file specifies an image and the image is not in the Source folder, the Cardholder data will be updated, but the image will not be imported. A log file is created and alarm warnings will be displayed to inform the operators of any failure to import the data correctly.

- The Image file extension is also required to be specified.
- To cut down processing time only supply the required Cardholder images to the Image folder, not all Cardholders.
- When an image is imported it may be resized depending on the settings in the Image Personal Data properties.
- The same image cannot be added to all Cardholders, unless a new copy is renamed for each Cardholder.

Configuring Command Centre to Receive the Source Data

Before configuring EDI to run, you will need to ensure that Command Centre is configured to receive the source data.

This can include:

- Personal Data Fields.
- Access Groups.
- Cards.
- Competencies.
- Roles and Relationships.

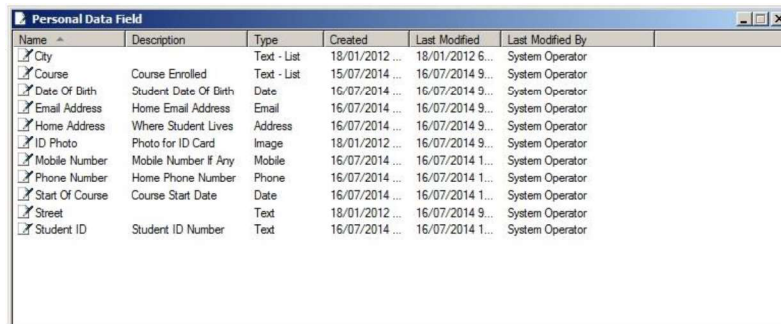
Create/Configure Personal Data Fields

Introduction

Personal Data Fields must be pre-existing in Command Centre so that data from the Source file can be mapped and imported correctly.

Procedure

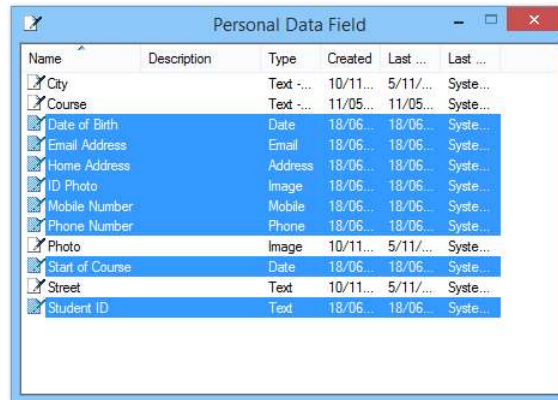
1. Create and Configure a Personal Data Field called **Student ID** and configure it to have **Text** as the data type – Sort Order 1
 - **Unique Value**
2. Create and Configure a Personal Data Field called **Date of Birth** and configure that PDF to have **Date** as the data type – Sort Order 2
3. Create and Configure a Personal Data Field called **Start of Course** and configure that PDF to have **Date** as the data type – Sort Order 3
4. Create and Configure a Personal Data Field called **Home Address** and configure that PDF to have **Address** as the data type – Sort Order 4
5. Create and Configure a Personal Data Field called **Phone Number** and configure that PDF to have **Phone** as the data type – Sort Order 5
6. Create and Configure a Personal Data Field called **Mobile Number** and configure that PDF to have **Mobile** as the data type – Sort Order 6.
7. Create and Configure a Personal Data Field called **Email Address** and configure that PDF to have **Email** as the data type – Sort Order 7
8. Create and Configure a Personal Data Field called **ID Photo** and configure that PDF to have **Image** as the data type – Sort Order 8



Name	Description	Type	Created	Last Modified	Last Modified By
<input checked="" type="checkbox"/> City		Text - List	18/01/2012 ...	18/01/2012 6...	System Operator
<input checked="" type="checkbox"/> Course	Course Enrolled	Text - List	15/07/2014 ...	16/07/2014 9...	System Operator
<input checked="" type="checkbox"/> Date Of Birth	Student Date Of Birth	Date	16/07/2014 ...	16/07/2014 9...	System Operator
<input checked="" type="checkbox"/> Email Address	Home Email Address	Email	16/07/2014 ...	16/07/2014 9...	System Operator
<input checked="" type="checkbox"/> Home Address	Where Student Lives	Address	16/07/2014 ...	16/07/2014 9...	System Operator
<input checked="" type="checkbox"/> ID Photo	Photo for ID Card	Image	18/01/2012 ...	16/07/2014 9...	System Operator
<input checked="" type="checkbox"/> Mobile Number	Mobile Number If Any	Mobile	16/07/2014 ...	16/07/2014 1...	System Operator
<input checked="" type="checkbox"/> Phone Number	Home Phone Number	Phone	16/07/2014 ...	16/07/2014 1...	System Operator
<input checked="" type="checkbox"/> Start Of Course	Course Start Date	Date	16/07/2014 ...	16/07/2014 1...	System Operator
<input checked="" type="checkbox"/> Street		Text	18/01/2012 ...	16/07/2014 9...	System Operator
<input checked="" type="checkbox"/> Student ID	Student ID Number	Text	16/07/2014 ...	16/07/2014 1...	System Operator

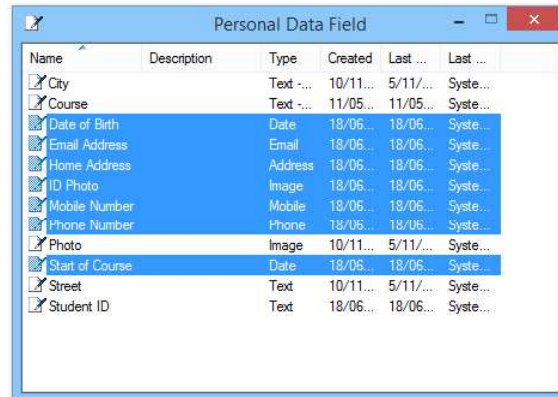
9. From the Menu bar click **Manage...Access Groups**

10. Drag & drop the newly created PDF's into the **Engineering Year 1** and **Engineering Year 2** Access Groups



11. Click **OK**

12. Drag & drop the newly created PDF's with the exception of Student ID into the **Engineering Lecturers** Access Group

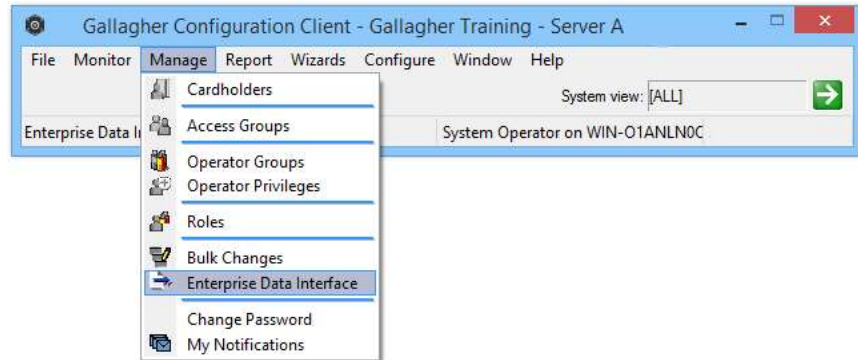


13. Click **OK**

Creating an EDI Interface

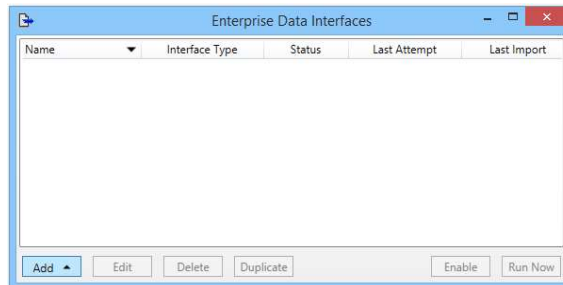
Procedure

1. From the Menu bar click **Manage...Enterprise Data Interface**

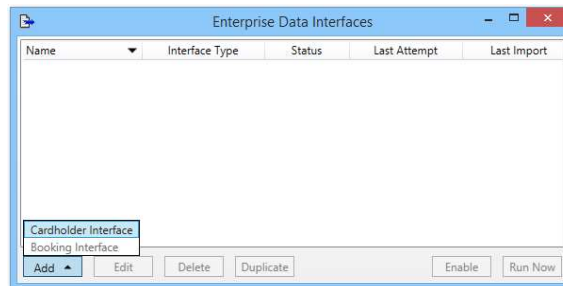


The window will show any EDI's that have previously been configured. The status of an interface is displayed in the Status Column of the window.

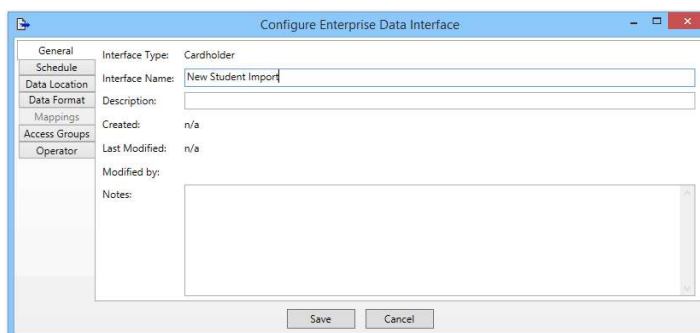
2. Click the **Add** button on the Enterprise Data Interface Screen



3. Click **Cardholder Interface**



4. From the General Tab, Enter **New Student Import** into the Interface Name field



Configure Enterprise Data Interface

General

Interface Type: Cardholder

Interface Name: New Student Import

Description:

Created: n/a

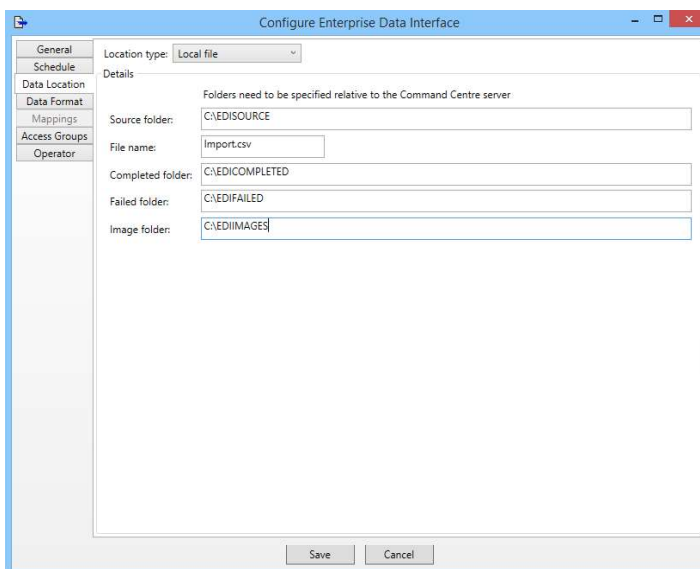
Last Modified: n/a

Modified by:

Notes:

Save Cancel

5. Select the **Data Location** tab
6. Enter the Folder locations that were configured earlier and the Import Data Source file name
 - Source Folder Location = C:\EDISOURCE
 - File Name = Import.csv
 - Completed Folder Location = C:\EDICOMPLETED
 - Failed Folder Location = C:\EDIFAILED
 - Image Folder Location = C:\EDIIMAGES



Configure Enterprise Data Interface

General

Schedule

Data Location

Data Format

Mappings

Access Groups

Operator

Location type: Local file

Details

Folders need to be specified relative to the Command Centre server:

Source folder: C:\EDISOURCE

File name: Import.csv

Completed folder: C:\EDICOMPLETED

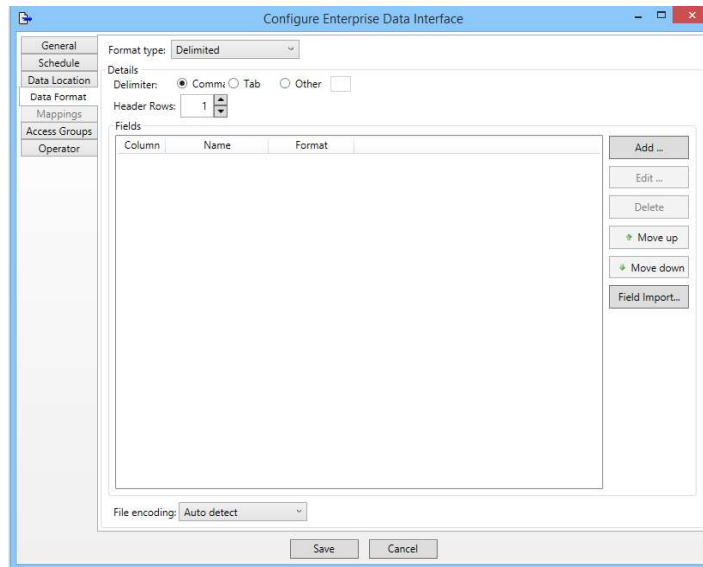
Failed folder: C:\EDIFAILED

Image folder: C:\EDIIMAGES

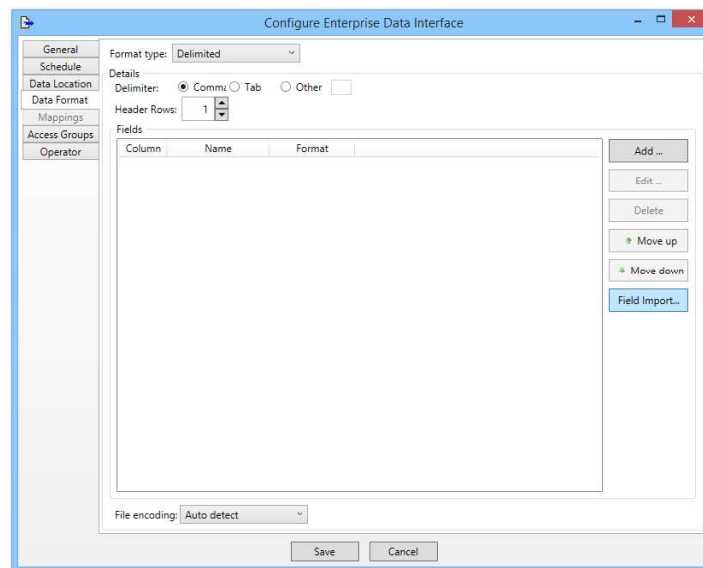
Save Cancel

7. Click the **Data Format** tab
8. Set the Format type to **Delimited**
9. Click the **Comma** radio button to set the delimiter type
10. Leave the File Encoding set as **Auto Detect**

11. Set the Header Rows to 1

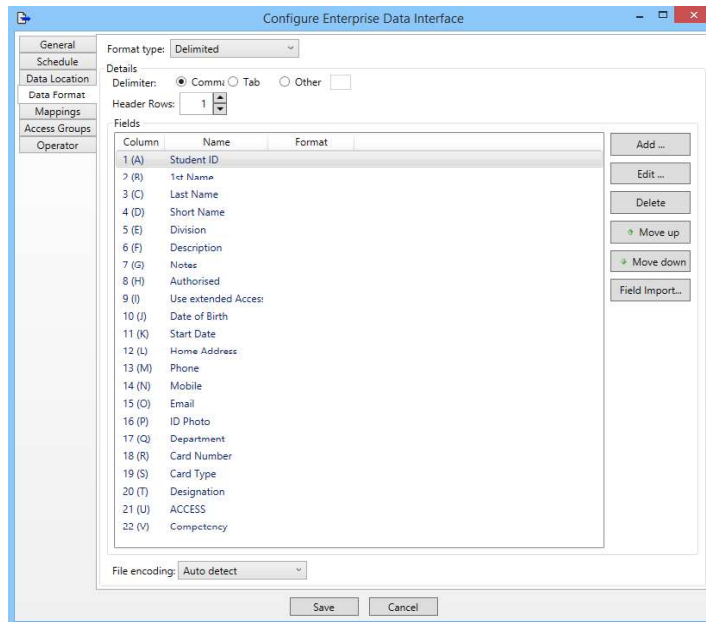


12. Click the **Field Import** Button



13. Browse to the **Source File**

14. Double click on the **Source File** to import fields

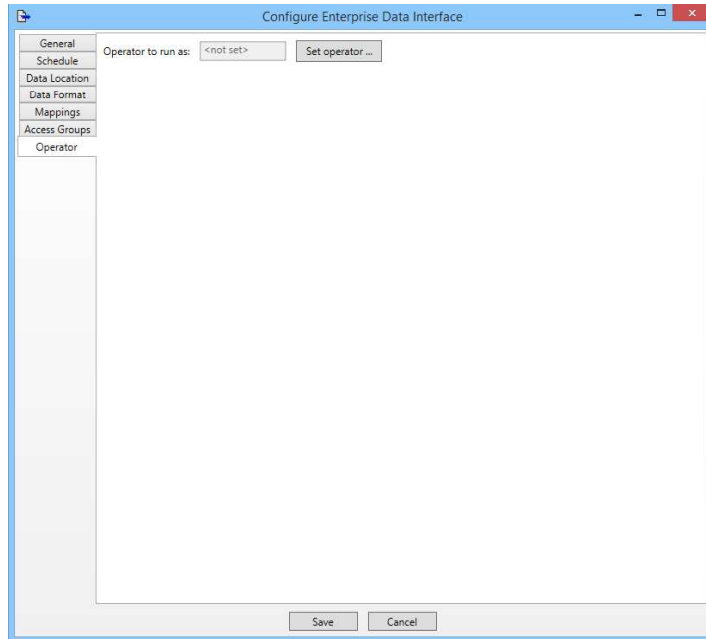


The fields are listed in the order that they were created in the source file.

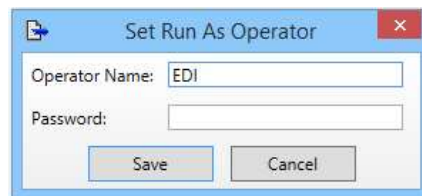
🔙 Setting the Mapping of Data between the Source File and Command Centre Data

🔄 Procedure

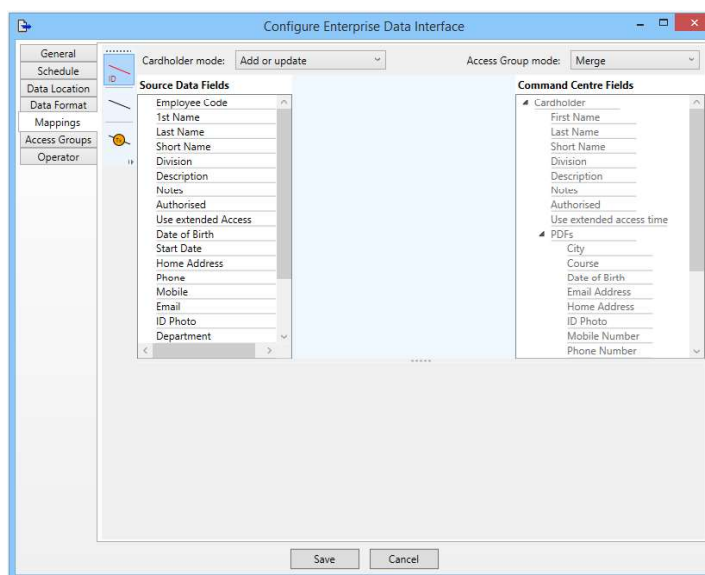
1. Click the **Operator** tab



2. Click **Set operator...**
3. Enter **EDI** as the Operator Name
4. Leave the **Password blank** (empty)
5. Click **Save**



6. Click **Mappings**



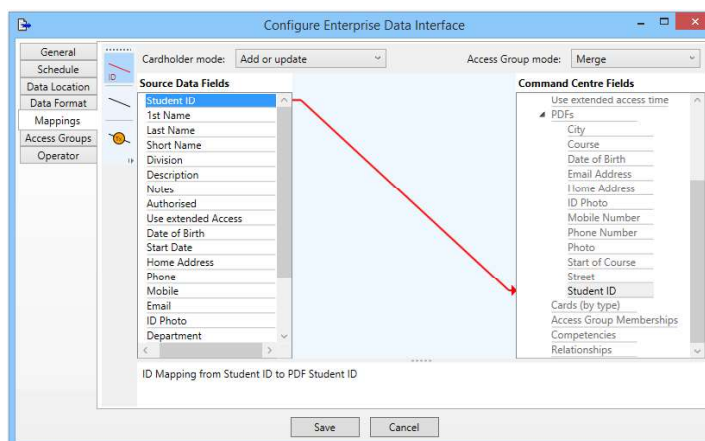
Listed on the left hand side of the screen are the Source File fields and on the Right Hand side of the screen are the corresponding Command Centre fields.

This screen is used to create data maps so that when the import is run the source data is mapped to the appropriate data fields in Command Centre.

7. Select **Add or Update** in the Cardholder Mode Field
8. Select **Merge** in the Access Group Mode Field
9. Ensure that the **Student ID** is set to **Text** and configured as a **Unique** value in Command Centre
10. Click the **ID Tool**



11. Click on **Student ID** and hold down the left mouse button then drag the cursor over to the unique field in the Command Centre list which is **Student ID**
12. Release the mouse when you are over the **Student ID** PDF



A red line will be drawn on the Map showing the Link between the data fields.

The ID Mapping link drawn between the Source and Command Centre fields provides the system with a unique reference to both lists and the data is now linked together.

If you make a mistake the link can be deleted by highlighting it, right clicking then selecting delete or highlight the link and press delete on the keyboard.

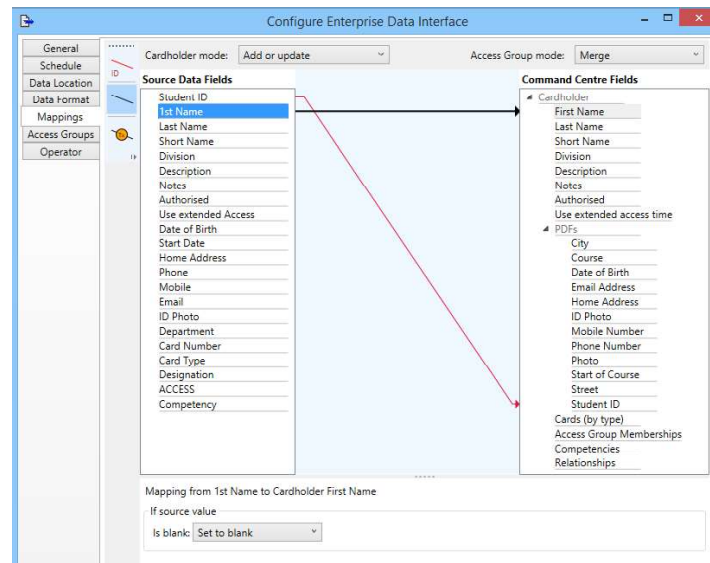
You cannot map the ID to a field which is not set to unique text or numbers. The unique data fields in Command Centre show in bold and the mouse behaves differently if you hover over them.

13. Select the **Direct Mapping Tool**



14. Map the **1st Name** field in the Source data to the **First Name** in Command Centre

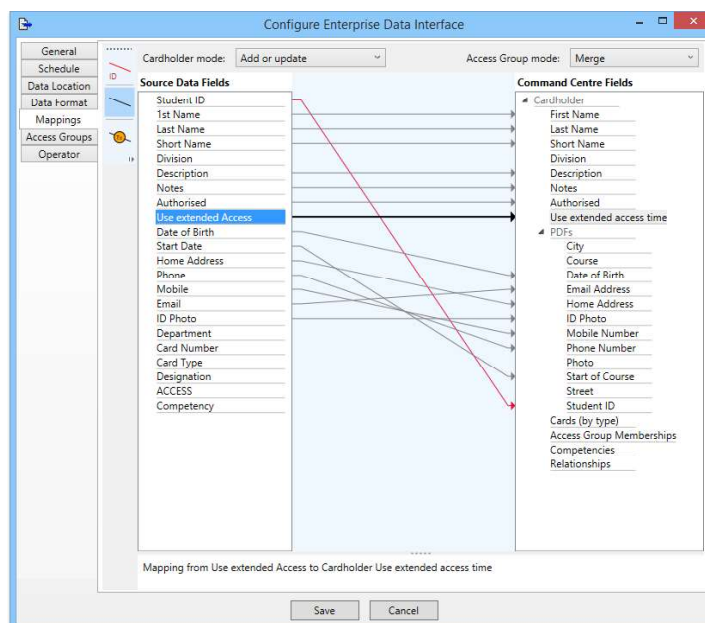
15. Hold down the **left mouse button** and drag the cursor over to the Command Centre field you wish to map to. Release the mouse button. A black line appears between the two fields and a message appears in the window below



This action then links the Source data with Command Centre, and when the import is run whatever is listed in the Source file will be imported into the Command Centre database.

16. Continue linking the following **Source Fields** to the **Command Centre Fields**

SOURCE DATA	COMMAND CENTRE DATA
Last Name	Last Name
Short Name	Short Name
Description	Description
Notes	Notes
Date of Birth	Date of Birth
Start Date	Start of Course
Home Address	Home Address
Phone	Phone Number
Mobile	Mobile Phone
Email	Email Address
ID Photo	ID Photo
Authorised	Authorised
Use Extended Access Time	Use Extended Access Time



Creating a Transformation Mapping

The creation of transformation mapping is similar to a direct mapping with the linking of fields. However, the Transformation Mappings also perform simple conversions to allow for easier importing.

Procedure

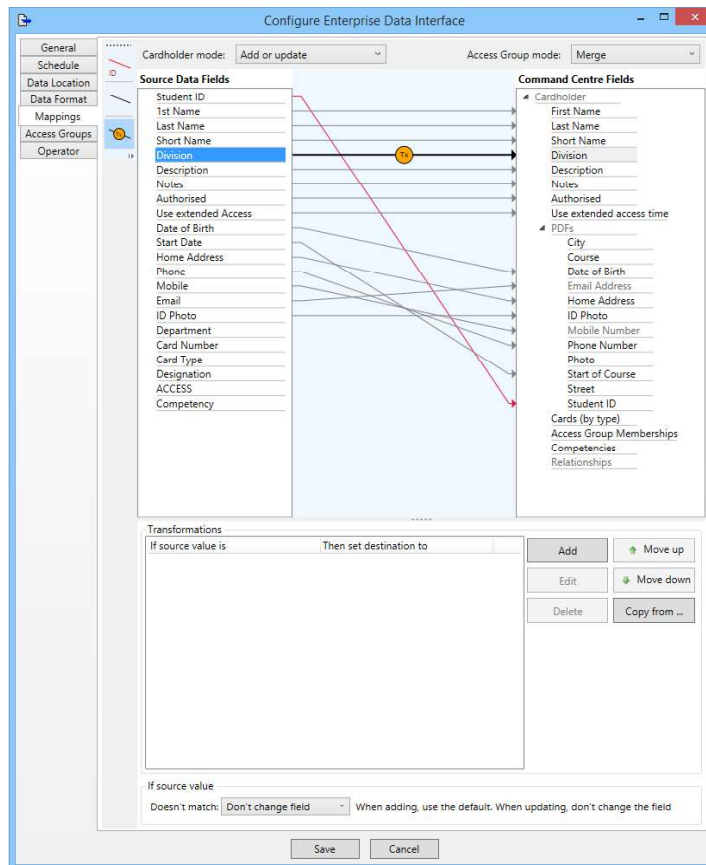
1. Select the **Transformation mapping** tool



2. Select the **Division** source field
3. Hold down the left mouse button and drag the cursor over to the Command Centre field **Division...**Release the mouse button

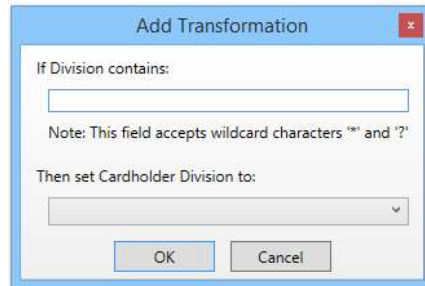
A black line and the transformation icon are shown between the two fields

4. The **Transformation grid** displays below the mapping area



- Click the **Add** button

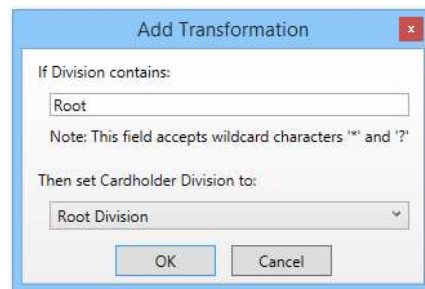
Add Transformation window opens



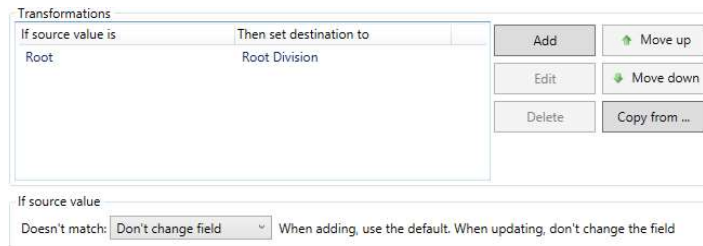
The 'Add Transformation' dialog box has a title bar with a close button. It contains two main sections. The first section is labeled 'If Division contains:' and has a text input field. Below this is a note: 'Note: This field accepts wildcard characters "*" and "?"'. The second section is labeled 'Then set Cardholder Division to:' and has a dropdown menu. At the bottom are 'OK' and 'Cancel' buttons.

- Enter **Root** into the If Division contains field

- From **Then set the Cardholder Division to** drop down list select **Root Division**



This is the 'Add Transformation' dialog box with the values entered in the previous step. The 'If Division contains:' field now contains the text 'Root'. The 'Then set Cardholder Division to:' dropdown menu now shows 'Root Division' selected. The 'OK' and 'Cancel' buttons remain at the bottom.



This section shows the 'Transformations' table and its associated controls. The table has two columns: 'If source value is' and 'Then set destination to'. It contains one row with 'Root' in the first column and 'Root Division' in the second. To the right of the table are buttons for 'Add', 'Edit', 'Delete', 'Move up', 'Move down', and 'Copy from ...'. Below the table, there is a section for 'If source value' with a 'Doesn't match:' dropdown set to 'Don't change field' and a note: 'When adding, use the default. When updating, don't change the field'.

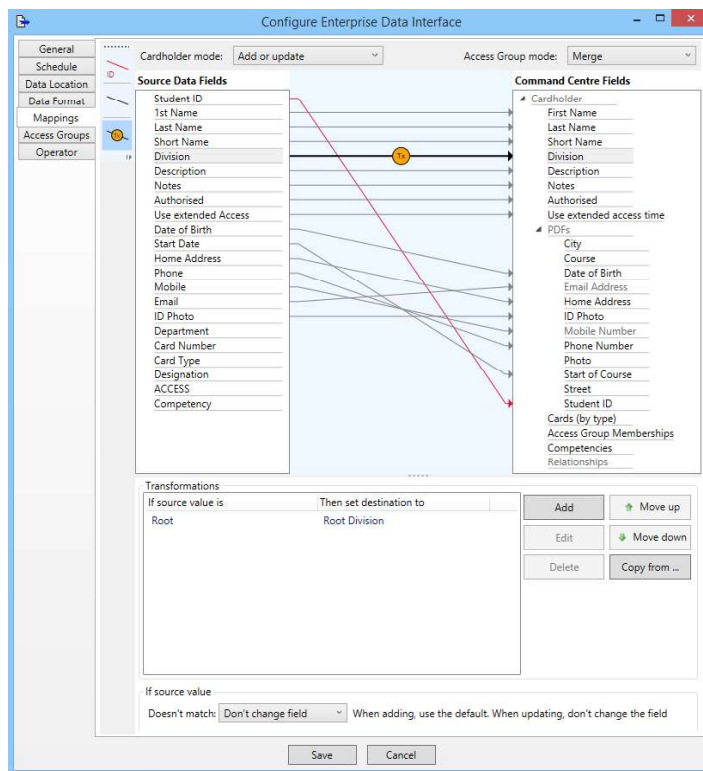
- Click **OK**



Note

Wildcards can be used - * and ? are acceptable wildcard characters.

When the EDI is run, the system will scan the Source file for a match and then map that data to Command Centre, converting from the word Root and adding the Cardholder to the Root Division.

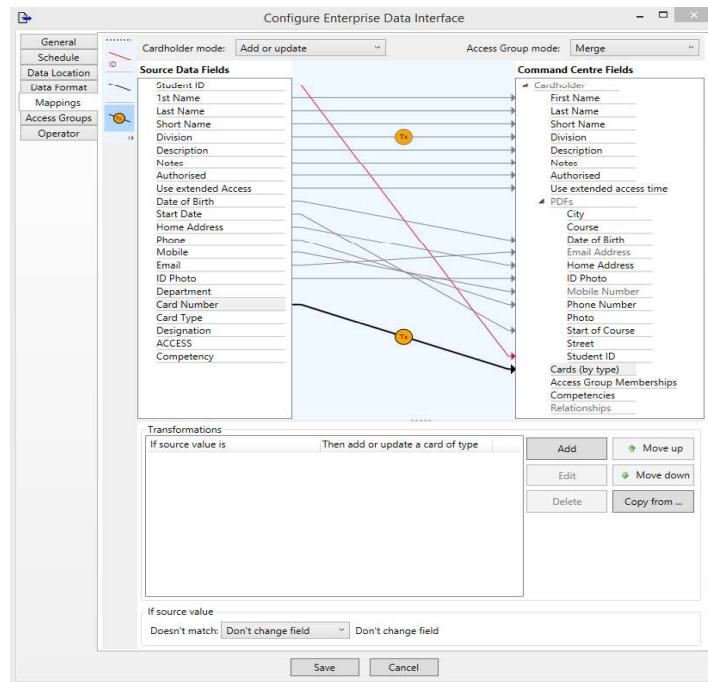


You can enter many transformations to the one link, so if your source file has different naming conventions they all can be transformed from the source value to the new Command Centre value.

Adding a Card Transformation

When a source value is transformed, it can be used to assign a card and define the cards properties. Alternatively, it can be used to modify the properties of a particular card type or the properties of all card types assigned to a Cardholder.

1. Create a **Transformation Mapping** between the **Card Number** Source field and the **Cards by Type** field in the Command Centre fields



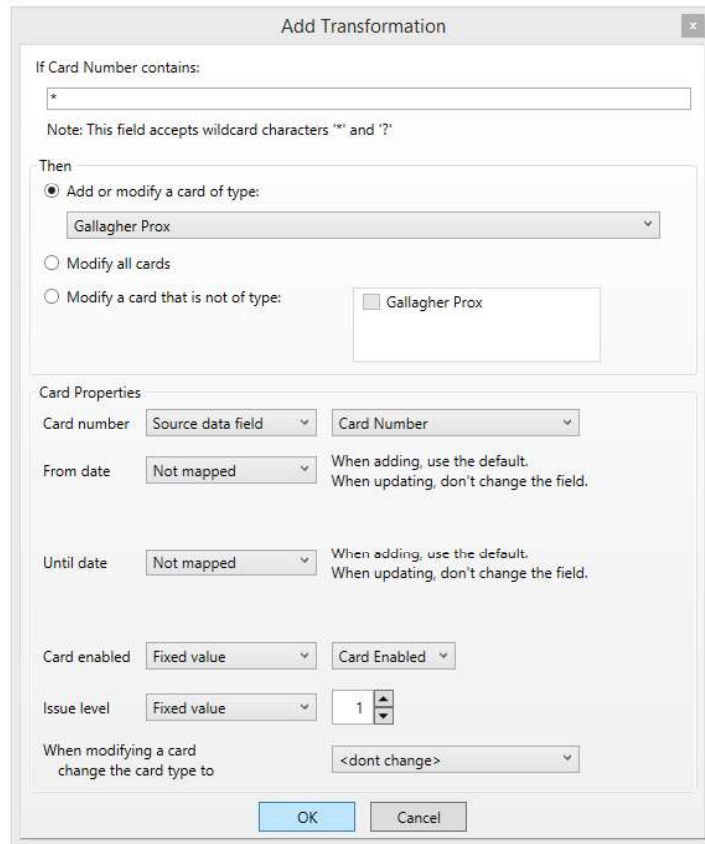
2. Click **Add** in the transformations area

The configuration has some required options - in that a card type needs to be specified, a card number allocated, from – until dates, card enablement, and issue level need to be defined.

You also need to define if you are going to modify 1 card type or all card types.

3. Enter * into the If Card Number contains
4. Select Add or Modify a card of type and from the drop down list select **Gallagher Prox**
5. From the Card Number drop down list select **Source Data Field**
6. From the Source date field drop down list select **Card Number**
7. From Date, is **Not mapped**
8. Until Date, is **Not mapped**
9. From the Card Enabled drop down list select **Fixed Value**
10. From the Card Enabled drop down list select **Card Enabled**
11. From the Issue Level drop down list select **Fixed Value**
12. Change the Issue Level to **1**

13. Click **OK**



The image shows a software dialog box titled "Add Transformation". It contains several sections for configuring a transformation rule. At the top, there is a field "If Card Number contains:" with an asterisk (*) entered. Below this is a note: "Note: This field accepts wildcard characters '*' and '?'". The "Then" section has three radio buttons: "Add or modify a card of type:" (selected), "Modify all cards", and "Modify a card that is not of type:". The first option is linked to a dropdown menu showing "Gallagher Prox". The third option is linked to a text box containing "Gallagher Prox". The "Card Properties" section includes several rows of dropdown menus: "Card number" (Source data field) linked to "Card Number"; "From date" (Not mapped) with a note "When adding, use the default. When updating, don't change the field."; "Until date" (Not mapped) with the same note; "Card enabled" (Fixed value) linked to "Card Enabled"; "Issue level" (Fixed value) linked to a spinner box set to "1"; and "When modifying a card change the card type to" linked to a dropdown menu showing "<dont change>". At the bottom are "OK" and "Cancel" buttons.

Add Transformation

If Card Number contains:

*

Note: This field accepts wildcard characters '*' and '?'

Then

☒ Add or modify a card of type:

Gallagher Prox

☐ Modify all cards

☐ Modify a card that is not of type:

Gallagher Prox

Card Properties

Card number: Source data field Card Number

From date: Not mapped When adding, use the default. When updating, don't change the field.

Until date: Not mapped When adding, use the default. When updating, don't change the field.

Card enabled: Fixed value Card Enabled

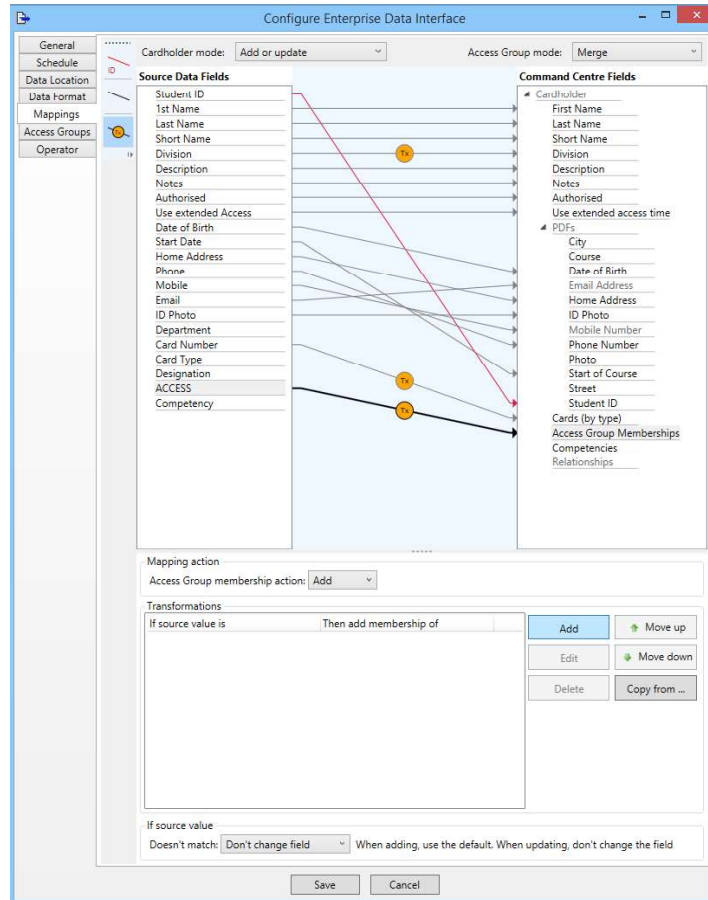
Issue level: Fixed value 1

When modifying a card change the card type to: <dont change>

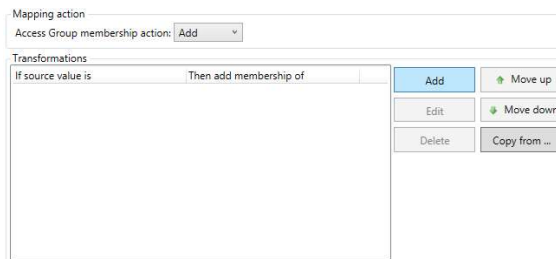
OK Cancel

Adding Access Group Transformations

1. Create a Transformation Mapping from the **ACCESS** Source Field to the Command Centre **Access Group Memberships** Field

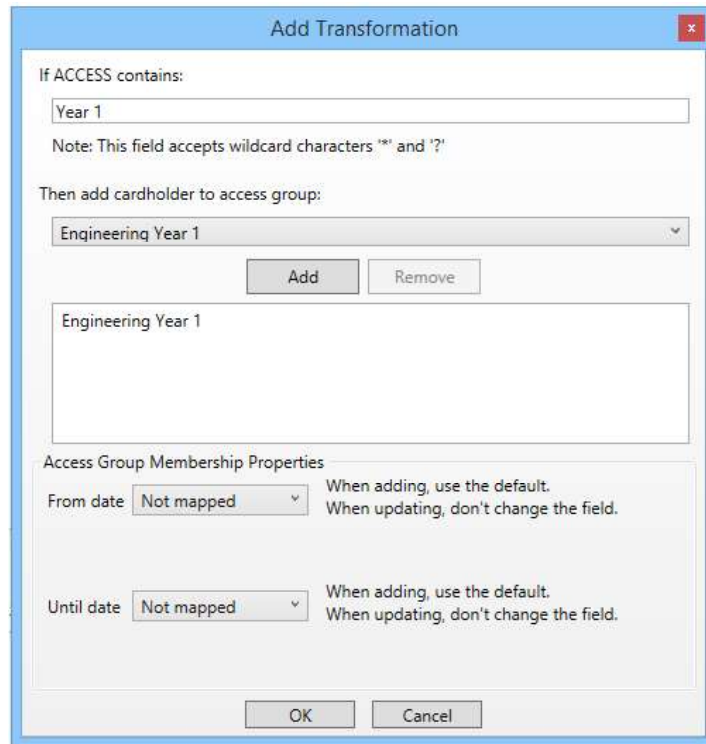


2. Click **Add** in the transformations area



3. Enter 'If ACCESS contains:' **Year 1** 'Then add cardholder to access group' **Engineering Year 1** Access Group
 4. Click **Add**
- Engineering Year 1 will populate the window
5. From Date, **Not Mapped**

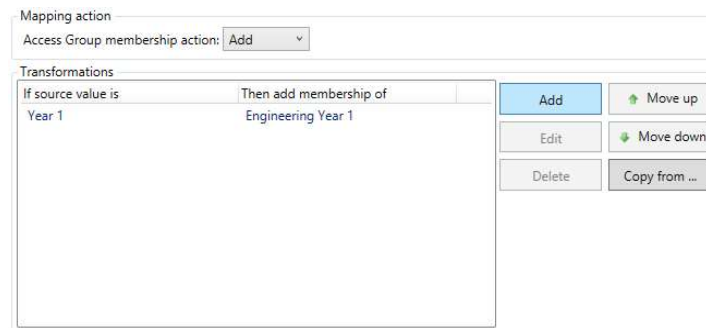
6. Until Date, **Not Mapped**



The 'Add Transformation' dialog box is shown. It has a title bar with a close button. The main content area is divided into sections. The first section is 'If ACCESS contains:' with a text input field containing 'Year 1'. Below this is a note: 'Note: This field accepts wildcard characters '*' and '?''. The second section is 'Then add cardholder to access group:' with a dropdown menu showing 'Engineering Year 1'. Below the dropdown are 'Add' and 'Remove' buttons. The third section is 'Access Group Membership Properties' with two rows. The first row is 'From date' with a dropdown set to 'Not mapped' and a note: 'When adding, use the default. When updating, don't change the field.' The second row is 'Until date' with a dropdown set to 'Not mapped' and the same note. At the bottom are 'OK' and 'Cancel' buttons.

7. Click **OK**

8. Click **Add** in the Transformations area



The 'Transformations' section of the interface is shown. It has a 'Mapping action' dropdown set to 'Add' and an 'Access Group membership action' dropdown set to 'Add'. Below this is a table with two columns: 'If source value is' and 'Then add membership of'. The first row contains 'Year 1' and 'Engineering Year 1'. To the right of the table are buttons: 'Add' (blue), 'Move up' (green arrow up), 'Move down' (green arrow down), 'Edit' (grey), 'Delete' (grey), and 'Copy from ...' (grey).

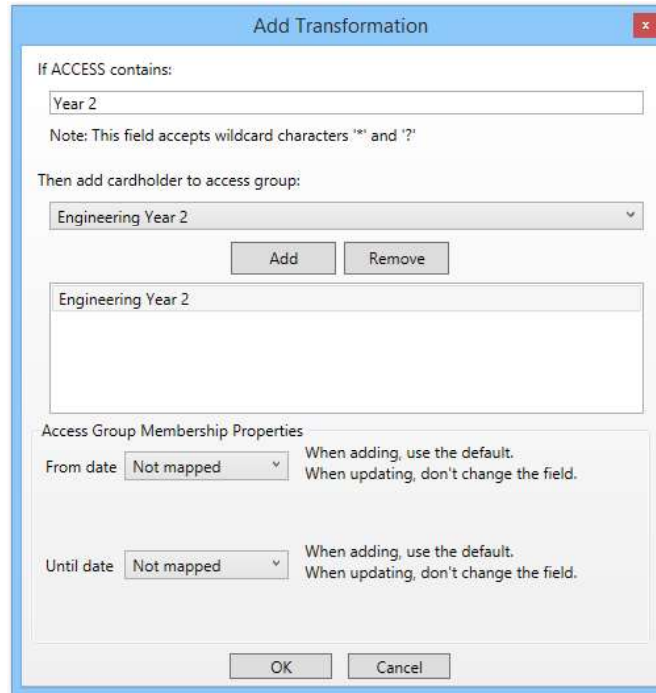
9. Enter 'If Access Contains:' **Year 2** 'Then add cardholder to access group' **Engineering Year 2**
Access Group

10. Click **Add**

Engineering Year 2 will populate the window

11. From Date, **Not Mapped**

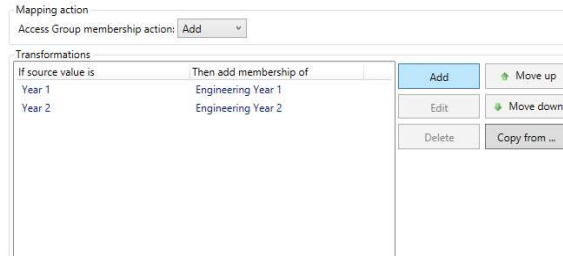
12. Until Date, **Not Mapped**



The 'Add Transformation' dialog box is shown. It has a title bar with a close button. The main content area is divided into several sections. The first section is 'If ACCESS contains:' with a text input field containing 'Year 2'. Below this is a note: 'Note: This field accepts wildcard characters '*' and '?''. The second section is 'Then add cardholder to access group:' with a dropdown menu showing 'Engineering Year 2'. Below the dropdown are 'Add' and 'Remove' buttons. The third section is a list box containing 'Engineering Year 2'. The fourth section is 'Access Group Membership Properties' with two rows. The first row is 'From date' with a dropdown set to 'Not mapped' and instructions: 'When adding, use the default. When updating, don't change the field.' The second row is 'Until date' with a dropdown set to 'Not mapped' and the same instructions. At the bottom are 'OK' and 'Cancel' buttons.

13. Click **OK**

14. Click **Add** in the Transformations area



The 'Transformations' area is shown. It has a 'Mapping action' dropdown set to 'Add'. Below this is a table with two columns: 'If source value is' and 'Then add membership of'. The table contains two rows: 'Year 1' mapped to 'Engineering Year 1' and 'Year 2' mapped to 'Engineering Year 2'. To the right of the table are buttons: 'Add' (blue), 'Edit', 'Delete', 'Move up' (green), 'Move down' (green), and 'Copy from ...' (grey).

15. Enter 'If Access contains:' **Lecturer** 'Then add cardholder to access group:' **Engineering Lecturers Access Group**

16. From Date **Not Mapped**

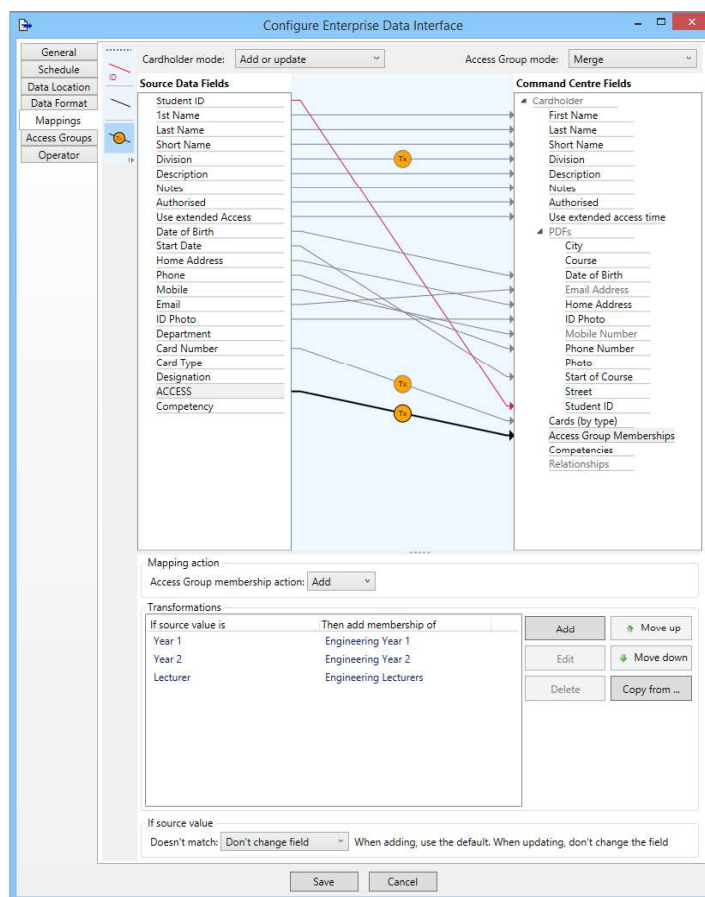
17. Until Date **Not Mapped**

18. Click **OK**

19. Click **Save**

Note

An until date could be specified that would remove the expired cardholders from this Access Group after the until date/time has expired.



In the above, the system will search the source file for matches under the Access Field and then add it to the appropriate access group.

If the Source file has Year 1, then they get Access to the Engineering Year 1 Access Group.

If the Source file has Year 2, then they get Access to the Engineering Year 2 Access Group.

If the Source file has Lecturer, then they get Access to the Engineering Lecturers Access Group.

You can save multiple EDI's but they must have different names.

Running EDI Manually

Introduction

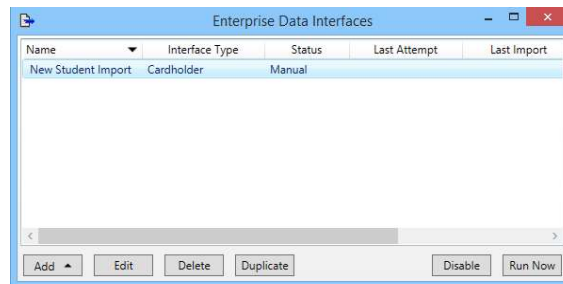
The EDI must be configured correctly before attempting to run and the status must be either Manual or Scheduled.

Check that you have the Source file in the correct location and that any images to be imported are also in the correct folders.

Backup your images and source data, as once the data is imported it will be removed from the Source folder(s) to the Completed folder – This is done in case the process fails and you need to re run the import.

1. Highlight **New Student Import**
2. Click **Enable**

Leave window open

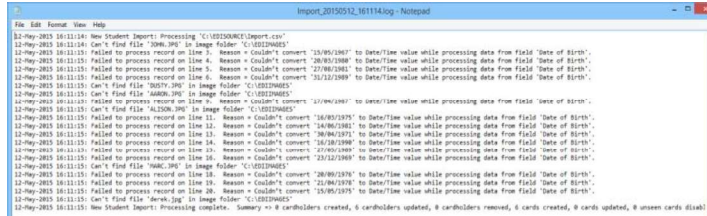


3. Open the **Event Viewer** (view events as data is imported)
4. Open **Cardholders** (view new Cardholders as they are imported into Command Centre)
5. Click **Run Now**

If all has been configured correctly the Cardholders will be imported along with PDF data and Access Groups. The Command Centre Event log will show each Cardholder being added along with any Access details. The event log will also show any errors and if the EDI failed to run.



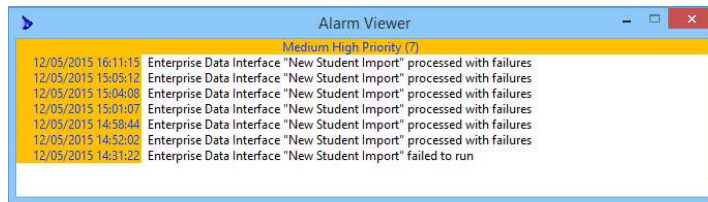
Error Messages and Log Files



After EDI has run, a log file is created which will show any failures in the import process, so that the operator can go in manually and investigate any errors.

The original Source file is renamed and moved into the Completed folder.

A copy of the Source file may also be copied into the EDI Failed folder.



Alarms can also be generated when a failure occurs prompting the operator to find and resolve any errors.

PROBLEM	SOLUTIONS
When importing from a source file the import did not run.	<ul style="list-style-type: none"> Check the source folder to see if the source file is present. The source file name has been incorrectly entered on the Data Location tab, (e.g. the file extension has not been entered).
Unable to convert value. The value could not be imported, as it is not of the correct format.	<ul style="list-style-type: none"> The source file has not been defined correctly on the Data Format tab, (e.g. the data format has been defined as dd/MM/yyyy but the date in the source file is d/MM/yyyy. Define the date format as d/MM/yyyy. Dates with the double day digit will still be imported. The header row has been processed.
Enterprise Data Interface has been upgraded and the Gallagher Command Centre Services will not start after restoring a backup.	<p>The sequence for restoring a backup is:</p> <ul style="list-style-type: none"> Restore your Enterprise Data Interface backup. Exit and stop the Gallagher Command Centre Services. Uninstall Enterprise Data Interface. Reinstall Enterprise Data Interface (same or later version). Restart the Gallagher Command Centre Services.

The interface has been scheduled to run on an interval and the “Ending at” time is the same as it is scheduled to run.	Check the Gallagher Command Centre Event Viewer to see if the interface has run.
A cardholder does not have the expected mapped value.	This may occur if you have mapped more than one source field to the cardholder field (this is not recommended). The last mapping made in the Edit Mappings window is used to add/update the cardholder field.
Operator does not have sufficient privilege.	The operator must be assigned the appropriate privileges in the required divisions to perform the actions specified by the import.
When importing from a database the import does not run.	Ensure the Windows Firewall on the database server allows incoming connections from the Command Centre server.
When importing bookings (for a Bookable Resource), and a booking is not imported, but the log states that the booking was successful imported.	Ensure that each booking record that is imported using the Booking Reference field uses a unique value. If a unique value is not used, the last booking record containing the Booking Reference will be the one that remains at the end of the import processing. All other booking records containing the same Booking Reference in the data set will not be imported.