

# Bulk User Tool Utility Information

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## Product Name

Bulk User Tool Utility Information

## General Information

The Bulk User Tool is for quickly adding and linking multiple users to their cardholder directory accounts while allowing the user to then log into Visitor Management.

For Visitor Management, the user logging in must be a cardholder. This cardholder must be paired with a user. This is typically done in System Administration by creating a directory, linking the cardholder with the directory account, then linking the user to that same directory account.

A log file for the Bulk User Tool is created in the log directory of the OnGuard installation (By default, this is c:\Program Files\OnGuard\logs). The BulkUserTool.log file can be accessed to view more details on how the Bulk User Tool has been run.

### ===== Limitations=====

- The Bulk User Tool cannot run on a mobile station.
- If searching on several thousand cardholders, memory consumption could become an issue. It is recommended to process these tasks in batches of just one or two thousand at a time.
- All cardholders that are used for linking and user creation must have the Allowed Visitors option enabled. The Allowed Visitors option can be found in System Administration by navigating to Administration > Cardholders and selecting the Visits sub-tab.
- If using an LDAP directory for linking cardholders in bulk, user name matches will not function properly.
- If using active directory for linking cardholders, the matching criteria must not contain mismatched parenthesis or a single "\*" character. An example of a valid search is: "(FRANK), FR\*". An invalid search is: "(FRANK, FR\*"

### ===== Permissions=====

To use the Bulk User Tool the following permissions must be enabled:

User directory accounts - In System Administration, select Administration > Users > System Permission Groups > Users, Directories, Certification Authorities, Logical Access. Enable the User directory accounts check box

along with its Link/unlink check boxes.

Users - In System Administration, select Administration > Users > System Permission Groups > Users, Directories, Certification Authorities, Logical Access. Enable the Users check box along with its Add, Modify, and Delete check boxes.

#### ====Obtaining the Bulk User Tool==

For OnGuard 2009 (6.3):

The Bulk User Tool can be obtained by logging in to [www.partner.lenel.com](http://www.partner.lenel.com) and navigating to the Support > Downloads page. Select your OnGuard version from the dropdown, click the Software tab, and scroll down to Installation Tools. (You will need a Lenel login to gain access to this site.)

For OnGuard 2010 (6.4) and later:

The Bulk User Tool has been added to the OnGuard Installation, and will be installed on every system including custom installations. The Bulk User Tool is available from the Windows Start menu after installation.

#### ====Using the Bulk User Tool====

Linking users to their cardholder directory accounts has two steps. First you must link the cardholder with a directory. You must then create a user account for that cardholder and link it with the same directory.

Step 1: Link cardholders with directories

- 1) Log into the Bulk User Tool using your OnGuard credentials.
- 2) On the Bulk User Tool welcome window, select the Link cardholders with directories radio button and click [Next].
- 3) From the Directory drop-down, choose the directory in which to link the cardholder(s) to.
- 4) Use the Field, Condition, and Value drop-down boxes to set the logic conditions that are used to search for existing cardholders and click [Add].

The logic search allows you to search a specific field that has a set condition with a certain value. For example, the field could be the cardholder's "Department", the condition could be set to "Contains", and the value could be "Engineering". This search would find any cardholders whose department is set to engineering.

- 5) The search conditions are added to the listing window. Click [Next].

6) Enter the cardholder search criteria to further narrow the search and click [Next]. The search will be limited to cardholders that can receive visitors.

7) The results window is displayed with all of the cardholders that met the conditions of the search listed. Select the cardholder(s) that you wish to link to the directory account. Click [Finish]. For more information about cardholders look at the details column in the listing window. The details listed will give you information for each cardholder such as, but not limited to, if the cardholder is already linked to an account.

#### Step 2: Create users and link with directories

Note: If you are modifying an existing user, the permission groups and segments of that user will not be modified. Only the directory account(s) will be added.

1) On the Bulk User Tool welcome window, select the Create users and link with directories radio button and click [Next].

2) The permission groups window opens. Choose the appropriate permission settings for the new users.

3) Enter the cardholder search criteria to further narrow the search and click [Next].

4) If your system is segmented, select the segments that you would like to search in and click [Next].

5) The results window is displayed. Select the user(s) that you wish to add and link to the cardholder directory account. Click [Finish]. For more information about cardholders look at the details column in the listing window. The details listed will give you information for each cardholder such as, but not limited to, if the cardholder is already linked to an account.

## Applies To

OnGuard 2009 (6.3.249) or later

## Additional Information

None