



Vision Pro™

Using the People Import/Export Tool
Quick Reference Guide

POWERFLEET®
People Powered IoT

FOR INITIAL SYSTEM SETUP

How to batch-upload people into your Vision Pro™ software database, so they can use your industrial truck management system.



Before You Start

“Access ID” is a key data field. It’s an electronic code *inside* each ID card that lets authorized people use equipment. The Access ID is often **NOT** the same as the number printed on the ID card!



For the easiest way to batch-upload system users with the People Import/Export tool, you should find out the Access ID for each equipment operator. To do this:

1. If your ID cards are from I.D. Systems, get a “Conversion” file from your program manager to translate each card’s printed number into its Access ID.

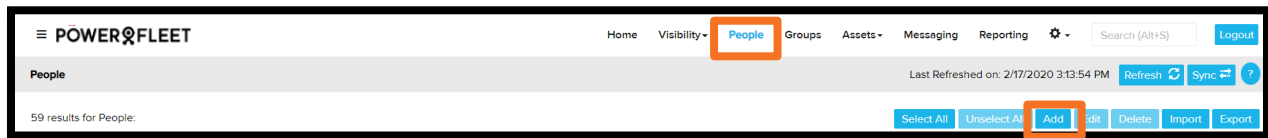
SAMPLE BADGE		five-digit badge ID	ACCESS ID Enter this number in the Access ID field
		00091	11206747

Example of a “Conversion” file that translates each ID card’s printed number into its “Access ID.”

2. If you’re using your own ID cards, **STOP**. You must send a sample card to your program manager to make sure you can set up your system properly, including converting your cards’ printed numbers into Access ID numbers.

NOTE: If you need to upload system users into your database right away, you CAN proceed with the People Import/Export tool, using “dummy” Access ID numbers. (See more below.)

Step 1: Set Up 4 “Reference” People Manually



On the main **People** screen, click **Add**.

Then enter (and **Save**) data for at least 4 “reference” types of system users, as listed below. (For full details, see “Vision Pro™ - People - Users Guide”)

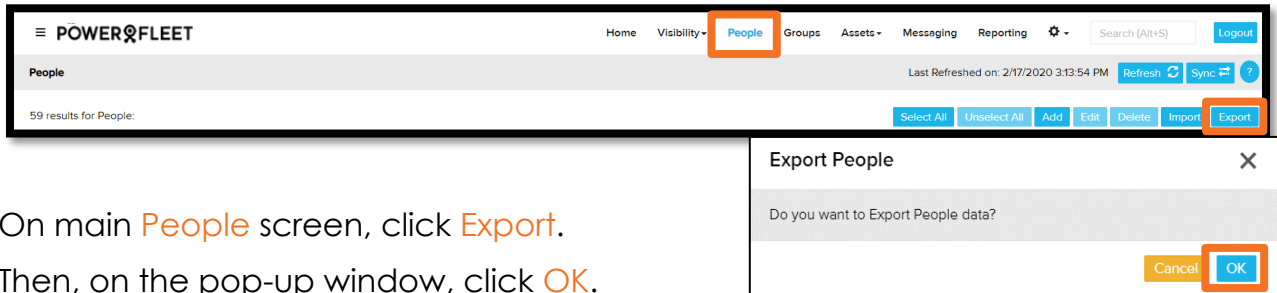
1. **Software User only** (e.g. IT or Admin): gets access to software, but not equipment.

For a Software-only User, **you MUST fill in the email address field**. You do not need to fill in Operator Credentials or Group Assignment(s).

For the three types of Operators below, **you MUST fill in Operator Credentials and at least 1 Group Assignment**. In addition, **IF the Operator needs software access, you must also fill in the email address field**.

2. **Standard Operator** (e.g. forklift driver): gets access to equipment but does not usually get software access.
3. **Master Operator** (e.g. floor supervisor): gets a higher level of access to equipment than Standard Operator, and often gets software access.
4. **Maintenance Operator** (e.g. lead mechanic): gets a higher level of access to equipment than Master Operator, and often gets software access.

Step 2: Export the "Reference" People You Set Up in Step 1



On main **People** screen, click **Export**.

Then, on the pop-up window, click **OK**.

A file named "IDSY_PEOPLE_YYYYMMDD_NNNNNN.csv" will be exported to your computer's download folder. Open the file.

Step 3: Fill in Your Exported File with Actual System Users

Here's an example of an exported "reference file" (this is an excerpt — there are actually 47 columns in the exported file):

	A	B	C	D	E	F	G	H	I	J	K	L
1	# General Information								Operator Information			
2	First Name	MI	Last Name	Email	Job Title	Organization	Mobile Phone	Carrier	External ID	Labor Rate	Credential	Authorization
3	Software		User1	SWUser1@test.com	IT Mgr	IT	555-123-4567	VZW			Not Licensed	STANDARD
4	Standard		StdOp1		FL Driver	Mat'l Handling	555-123-4568	VZW			Licensed	STANDARD
5	Master		MstrOp1	MstrOp2@test.com	Supervisor	Mat'l Handling	555-123-4569	VZW			Licensed	Master
6	Maintenance		MntcOp1	MntcOp2@test.com	Maint Mgr	Maintenance	555-123-4570	VZW			Licensed	Maintenance
7												

Do NOT change the order of any cells or columns in the exported file.

1. Download your actual employee data into a *different* spreadsheet, and edit it so the column headings A-J match the exported file. It's OK if your actual data does not include some fields (e.g. External ID or Labor Rate).
2. Copy/paste your actual employee data into the exported file, below the 4 rows of reference data. Make sure the column data matches.
3. Decide which type of user each employee is, then go to the row of the same type of "reference person." Copy the "reference row" data from columns K-AU, and paste it into the same columns in the corresponding employee's row.

For full details on all of the data fields, see "Vision Pro™ - People - Users Guide."

Step 4: Add Access IDs to Your Exported File

As noted above in **Before You Start**, there are several ways to input **Access IDs**.

1. If your ID cards are from Powerfleet:

- Make a list of the printed numbers on your employees' ID cards, with each number next to the corresponding employee's name.
- Use the "Conversion" file to translate each card's printed number into its Access ID number.
- Copy/paste the Access ID numbers from the "Conversion" file to the exported file (which, after **Step 3**, should now have actual employee data in it).

	A	B	C
1	First Name	Last Name	Card No.
2	Jane	Doe	00091
3	Richard	Little	00123
4	John	Smith	00167
5	Kevin	Wilkes	00154
	Type 5-digit badge ID here	Enter this number in the Access ID field	
	00091	15728731	
	00123	15728763	
	00167	15728807	
	00154	15728794	

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	# General Information				Operator Information								
2	First Name	MI	Last Name	Email	Job Title	Organization	Mobile Phone	Carrier	External ID	Labor Rate	Credential	Authorization	Access ID
3	Jane		Doe	jdoe@test.com	IT Mgr	IT	555-123-4567	VZW			Not Licensed	STANDARD	15728731
4	Richard		Little		FL Driver	Mat'l Handling	555-123-4568	VZW			Licensed	STANDARD	15728763
5	John		Smith	jsmith@test.com	Supervisor	Mat'l Handling	555-123-4569	VZW			Licensed	Master	15728807
6	Kevin		Wilkes	kwilkes@test.com	Maint Mgr	Maintenance	555-123-4570	VZW			Licensed	Maintenance	15728794

- Upload the complete exported file (see section below on **Importing People**).
- If you're using your own ID cards, and we test a sample card, you may be able to use a custom "Conversion" file. If so, follow the same process under "If your ID cards are from Powerfleet," above (but using the custom "Conversion" file).
 - If you're using your own ID cards, you can manually enter Operator Access IDs into your exported file, without a card test.

- Print a list of employees with a space for "Access ID" next to each name.
- Give copies of this list to Maintenance Operators so they can (i) log in to the vehicle hardware (VAC); (ii) select the menu options "Hardware" / "Read ID"; scan any Operator's ID card; and (iv) next to that Operator's name on the list, write down the Access ID displayed on the VAC.

First Name	Last Name	Access ID
Jane	Doe	
Richard	Little	
John	Smith	
Kevin	Wilkes	

(iii)

For full details on scanning ID cards on the VAC, see the "Read Operator Identification" section of the "Powerfleet® VAC4 Hardware Users Guide."

- Collect the completed lists and enter the Access IDs into your exported file.
- Upload the complete exported file (see section below on **Importing People**).

4. If you're using your own ID cards, you can also enter "dummy" Access IDs to the exported file, then scan the cards yourself, without a card test.

- a. Connect the USB Badge Reader (included in your Site Kit) to scan each employee's Operator ID card.

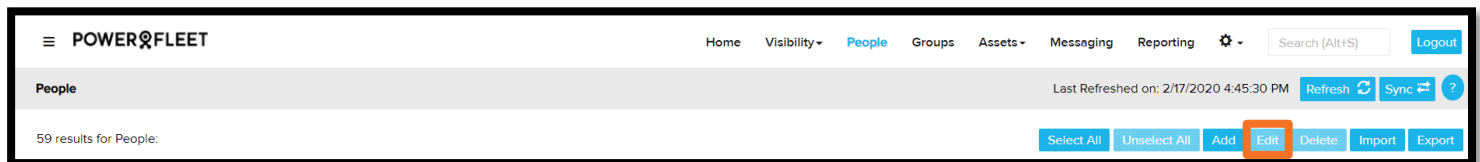
i. **For full details on scanning ID cards with USB Badge Reader, see the "Vision Pro™ - People - Users Guide."**



- b. Enter a unique "dummy" Access ID number for each employee in your exported file, and save the file:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	# General Information				Operator Information								
2	First Name	MI	Last Name	Email	Job Title	Organization	Mobile Phone	Carrier	External ID	Labor Rate	Credential	Authorization	Access ID
3	Jane		Doe	jdoe@test.com	IT Mgr	IT	555-123-4567	VZW			Not Licensed	STANDARD	10000001
4	Richard		Little		FL Driver	Mat'l Handling	555-123-4568	VZW			Licensed	STANDARD	10000002
5	John		Smith	jsmith@test.com	Supervisor	Mat'l Handling	555-123-4569	VZW			Licensed	Master	10000003
6	Kevin		Wilkes	kwilkes@test.com	Maint Mgr	Maintenance	555-123-4570	VZW			Licensed	Maintenance	10000004

- c. Upload the complete exported file (see section below on **Importing People**).
- d. Select the **Edit** menu to change employee data.



- e. Go to the **Operator Credentials** section for each employee. Next to the **Access ID** field, click the **icon**. A pop-up will appear: "Scan the access card." Scan the card and save the Operator's updates.

Operator Credentials

Credential

Licensed

Access ID

10000006

External ID

Enter External ID

Authorization

STANDARD

Certification Expiration Date

Medical Expiration Date

License Expiration Date

Scan the access card

Cancel

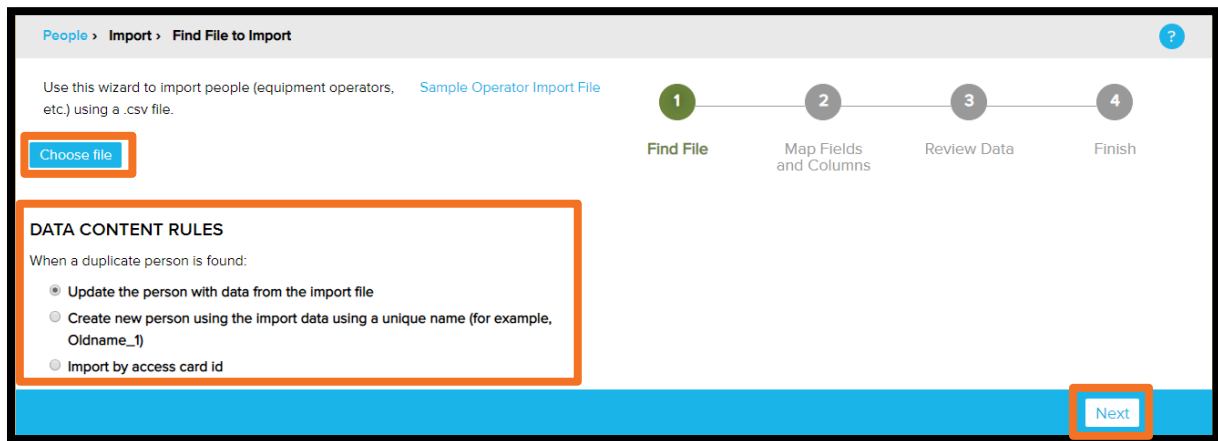
Save

Step 5: Importing People

1. On the main **People** screen, click **Import**.



2. On the next screen (**People/Import/Find File to Import**), select the **Data Content Rule** that you want for duplicate data, then click **Choose File**. Generally, the default, "Update the person with data from the import file," will do.



3. Browse to the folder where you saved the exported .CSV file (which you filled out with actual employee data) and click on that file. Then click **Next**.

4. The next screen ([People/Import/Map...](#)) shows any mapping errors in the file. Since the file was originally exported from the system, it should have NO errors. If it does, correct them and repeat 3 above. If there are no errors, click [Next](#).

People > Import > Map Required Fields and Column Headers

For each of the required field, select the corresponding column header from your .csv file.
All required fields must be mapped to a column header.
Required fields are indicated by an asterisk (*)

1 Find File 2 Map Fields and Columns 3 Review Data 4 Finish

4 rows from the import file have been evaluated.
0 unmapped column(s) found.
47 column(s) are mapped.

General Information

First Name * First Name Col(1)

MI MI Col(2)

Last Name * Last Name Col(3)

Group Assignment

Group Name 1 Group Name 1 Col(18)

Expiration Date 1 Expiration Date 1 Col(19)

Skill Level 1 Skill Level 1 Col(20)

Previous Next

5. The next screen ([People/Import/Review...](#)) shows the data imported from your file. If it looks OK, click [Import](#) to upload the data into the Vision Pro™ database.

People > Import > Review Data for Import

View: ☒ All rows ☐ Invalid rows that will not be imported ☐ Rows adding new records ☐ Rows updating existing records ☐ Rows with missing data that will be imported

Errors	First Name	MI	Last Name	Email	Job Title	Organization	Mobile Phone	Carrier	External ID	Labor Rate	Credential	Authorization	Access ID	PIN	License Date	Certification Date	Medical Date
Details	Jane		Doe	jdoe@test.com	IT Mgr	IT	555-123-4567	VZW			Not Licensed	STANDARD	10000001	0			
Details	Richard		Little		FL Driver	Mat'l Handling	555-123-4568	VZW			Licensed	STANDARD	10000002	0			
Details	John		Smith	jsmith@test.com	Supervisor	Mat'l Handling	555-123-4569	VZW			Licensed	Master	10000003	0			
Details	Kevin		Wilkes	kwilkes@test.com	Maint Mgr	Maintenance	555-123-4570	VZW			Licensed	Maintenance	10000004	0			

Previous Cancel Import

Step 6: Adding Roles for Software Users

IMPORTANT: This step MUST be completed manually for ALL imported software users.

Each Vision Pro™ software user MUST be assigned a Software Role. Along with the user's imported email address, this allows the user to receive login rights.

1. Select each software user, one at a time, from the list of people on the main People screen. Then click Edit.

2. On the Edit screen, click the Software Role drop-down and select the appropriate role. Then click Save. Repeat for all imported software users.

All software users, with an assigned software role, will be sent an automatic email from donotreply@id-systems.com containing instructions on how to setup login password.
