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Symphia NowForce

Bulk Upload Guide

For versions 5.6 and above

Contents

Preface

The NowForce advanced dispatch and response technology provides comprehensive situational awareness. NowForce allows dispatchers, responders and third-party resources to share insights in real-time, creating faster response times to potential threats and active incidents. NowForce leverages an integrated system of live and historical event data, state-of-the-art mapping, and tailored mobile applications for responders' and reporters' input to ensure that the closest, best equipped and most appropriate personnel is dispatched.

Contacting Cognyte Service and Support

At Cognyte, we value our users and partners, and we strive to continuously improve the customer service experience. Cognyte Smart Support™ ensures 24/7, on-demand service and support. Enter support requests, access training and troubleshooting tips, initiate RMAs, check warranty status, access resources, and more.

If you encounter any type of problem after reading this document, contact your local distributor or Cognyte representative. For the main service and support page on the Cognyte web page, visit: https://www.cognyte.com/contact

For immediate assistance, contact the support team:

<table>
<tr><th>Cognyte Support™ App</th><th colspan="2">Contact Support</th></tr>
<tr><td rowspan="3">Android

iOS</td><td>Americas</td><td>Phone: +1-866-639-8482 or +1-303-254-7005
Email: symphia.support@cognyte.com
CALA: Open 9:00 am to 5:00 pm (EST) Monday to Friday
Canada/USA: Open 9:00 am to 5:00 pm (Local Time) Monday to Friday</td></tr>
<tr><td>Europe, Middle East, and Africa</td><td>Phone: +44 (0) 845-843-7333
Israel: +972 99624286
Email: symphia.support@cognyte.com
Open 8:00 am to 6:00 pm (GMT) Monday to Friday</td></tr>
<tr><td>Asia/Pacific</td><td>India: (+91) 124 415 9500
Singapore: (+65) 6549 7769
Email: symphia.support@cognyte.com
Open 9:00 am to 5:00 pm Local Time (Monday to Friday)</td></tr>
</table>

Overview

The NowForce Bulk Upload Utility enables you to create multiple entities in the NowForce system simultaneously, by uploading the entities as rows a worksheet (tab). You can upload the following entity types: Groups, Incident Types, Incidents, POIs, Beacons, Geofences, and Users.

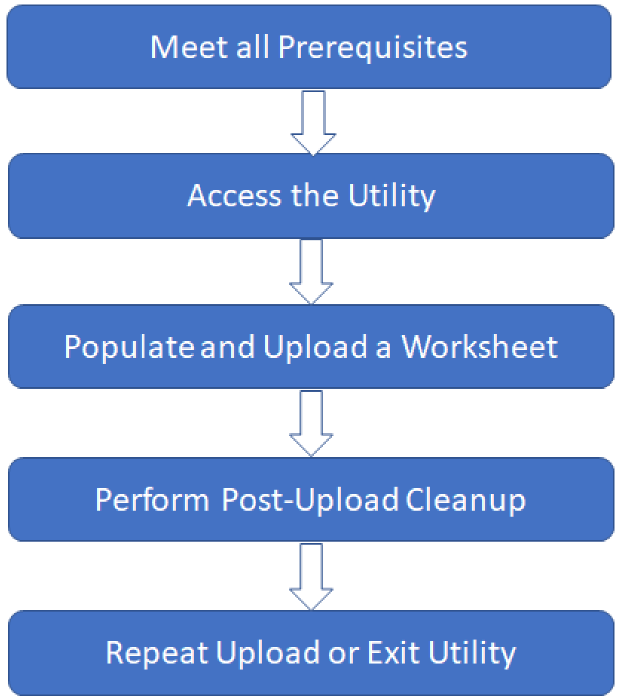
> Note
> - This utility does not delete or modify existing entities.
> - Rollback is not supported after upload.

This guide explains how to use the Bulk Upload Utility. It is intended for administrators who have prior experience with creating entities in the various NowForce system modules.

About this Document

The high-level and detailed steps recommended in this document for using the Bulk Upload Utility are summarized below.

High-Level Flow



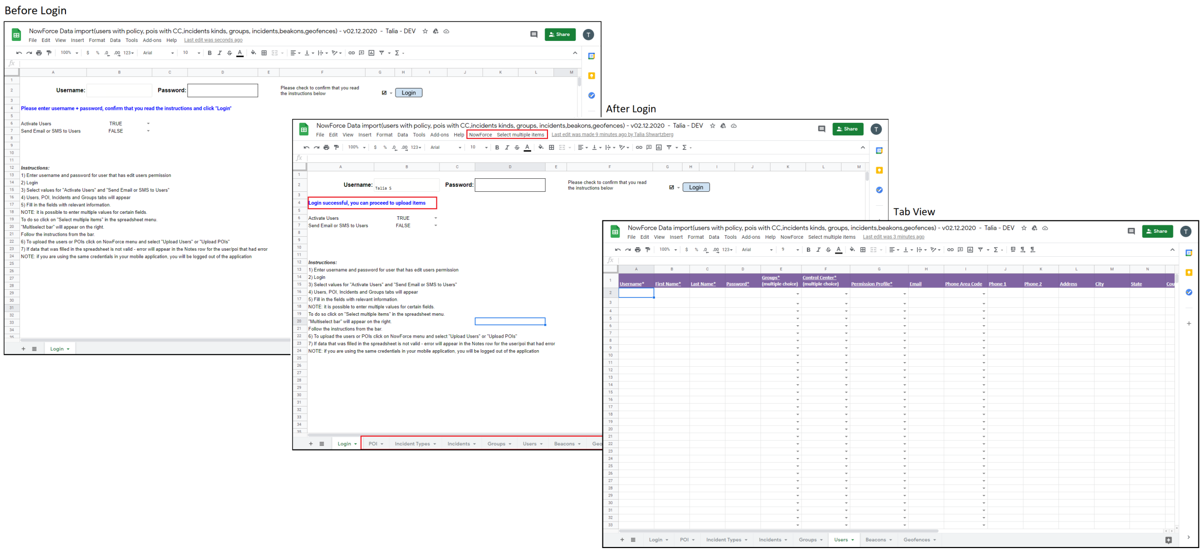
Detailed Flow

No.	Step	Related Topics
1	**Meet all Prerequisites**	"Prerequisites " (page 7)
2	**Access the Utility**	"Requesting the Utility" (page 7)
		"Logging into the Utility" (page 8)
		"Utility Layout and Views" (page 7)
3	**Populate and Uploading a Worksheet**	"Populating and Uploading a Worksheet" (page 11)
		"Changing Default User Settings (Optional)" (page 10)
		"Appendix A: Entity-Specific Upload Guidelines" (page 14)
		"Appendix B: Cell-Specific Editing Guidelines" (page 16)
4	**Perform Post Upload Cleanup**	"Performing Post-Upload Cleanup" (page 12)
5	**Repeat Upload or Exit Utility**	"Populating and Uploading a Worksheet" (page 11)
		"Exiting the Utility" (page 13)

Utility Layout and Views

The NowForce Bulk Upload Utility is a Google Sheets online spreadsheet accessed via a link.

It comprises a login tab and seven additional tabs for each of the NowForce entity types supported by the utility.



For Google Sheets terminology and usage, see Google Support.

Prerequisites

To receive and use the Bulk Upload Utility, you must have:

- A Google account with a Gmail address.
- A NowForce user account.
- Administrative user credentials.

Requesting the Utility

Email a request for the utility and your Google account details to the NowForce Support team. For contact information, see "Contacting Service and Support" (page 1).

Logging into the Utility

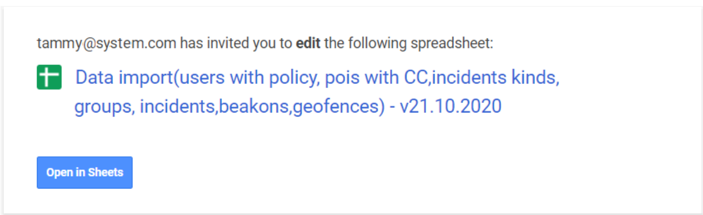
This section explains how to log into the Bulk Upload Utility with your NowForce administrator username. As a best practice, always log in immediately before using the utility, regardless of previous usage.

Note the following limitations prior to login:

- You cannot log into the Bulk Upload Utility and NowForce system at the same time with the same username. Logging into one will log you out of the other.
- You cannot log into more than one instance of the spreadsheet with the same username. Logging into one instance will log you out of the other.

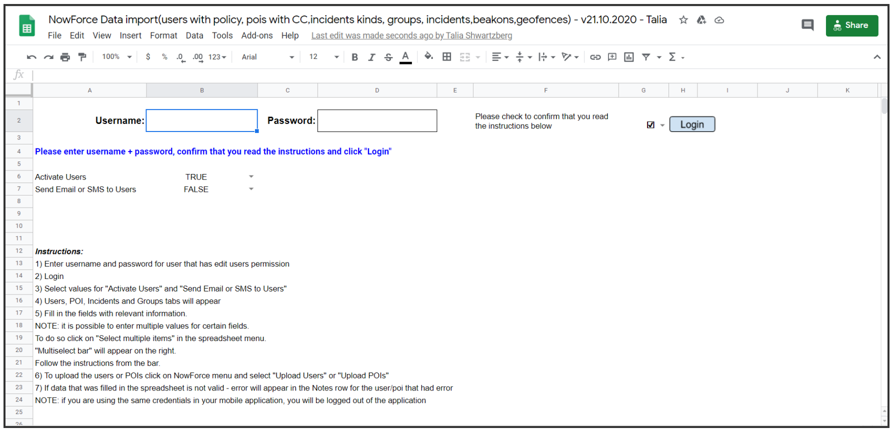
▼ To log into the Bulk Update Utility

1. Open the email you received from NowForce and click **Open in Sheets**.



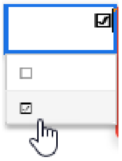
> **Tip**
> You can optionally save the link as a favorite in the browser for future access. However you must be logged in to your Google account to update the spreadsheet.

2. Enter your system administrator username and password in the corresponding fields.



3. Select the **Please check to confirm that you read the instructions below** checkbox. To

do so, click the field and select the lower option.

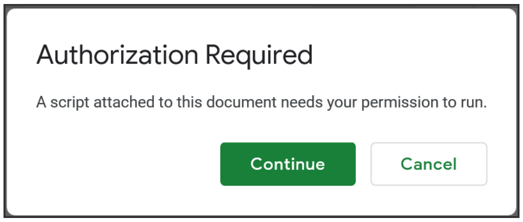


4. Click the **Login** button adjacent to Username and Password.

> Caution
> Login fails if the Username or Password cells are still selected. Click elsewhere in the spreadsheet and then click **Login** again.

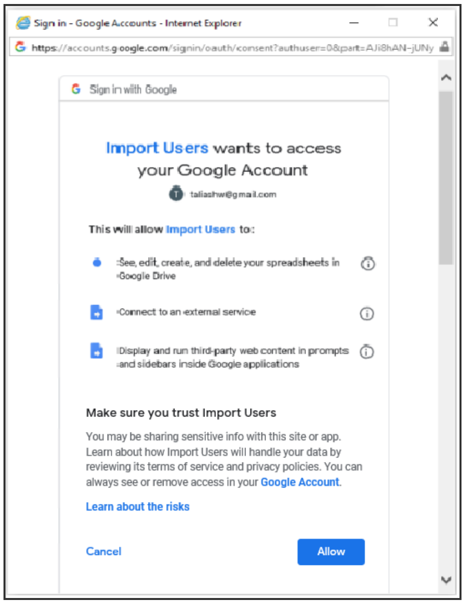
5. If you are logging in for the first time, do the following:

   a. In the Authorization Required window, click **Continue** to give your account access to the spreadsheet.

   b. If you have more than one Gmail account, double-click the relevant account in the **Choose an account** window.

c. On the **Import Users** page, click **Allow** to link your system user to the Gmail account.



6. Wait until the authentication script completes and you receive the message "Login successful, you can proceed to upload items".

Changing Default User Settings (Optional)

If you are uploading User entities, you can optionally change the **Activate Users** and/or **Send Email or SMS to Users** default values prior to upload. These settings are located on the Login worksheet apply to all entities in the Users worksheet. This can be done either before or after login.

▼ To change the default user settings

1. Open the spreadsheet and log in if preferred. For details, see "Logging into the Utility" (page 8).
2. From the **Activate Users** dropdown list, select an option:
   - True (default) - To automatically activate all users after they have been uploaded. Each user will then be able to log into the NowForce modules for which they have privileges.
   - False - To upload the users without activating them. The administrator will then need to activate each user separately in the Users panel of the Dispatcher module.
3. From the **Send Email or SMS to Users** dropdown list, select an option:

- False (default) - To activate users without notifying them.
- True - To send an activation notification to users via email and/or SMS.

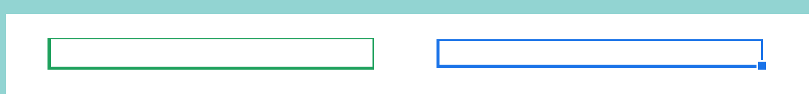
> Tip
>
> A user can receive an email notification if an email address has been added in NowForce. A user can receive an SMS notification if the telephone number has been added in the system and an SMS Gateway has been defined for the organization.
>
> The SMS Gateway is configured in the Interfaces page of the NowForce Administrator module. For details, see How to Configure the Text Messaging Gateway in the Dispatcher.

4. Click another cell elsewhere on the page to save the changes.

Populating and Uploading a Worksheet

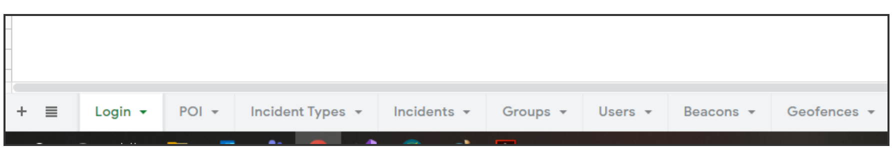
This section explains in general how to add and upload entities in a worksheet. The utility lets you upload one worksheet at a time. For best practices, leave all other worksheets empty.

Before starting, carefully read "Appendix A: Entity-Specific Upload Guidelines" (page 14) for further details about the entity type you are uploading.

> Tip
>
> - You can upload up to 100 records at a time in a worksheet.
> - Selecting a cell creates a border with a color assigned to you. If you see different colored borders, then more than one system-defined user is currently updating the spreadsheet. This is not recommended as it can lead to errors.
>
> 
>
> - After adding information into the NowForce system (either directly or via the Bulk Upload utility) you must log into the utility again to see the updates.

▼ To add records to a worksheet

1. Log into the Bulk Upload utility. For details, see "Logging into the Utility" (page 8).
2. Open a worksheet by clicking its tab at the bottom of the spreadsheet.

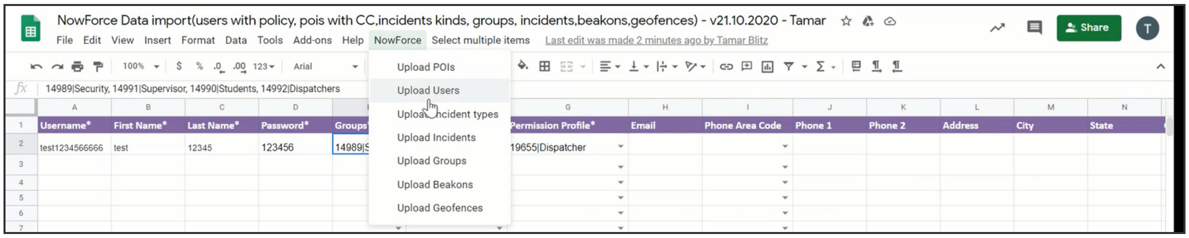


3. Manually add each new record as a row by entering data in the cells. Instructions are displayed in the column header, where relevant.

> Tip
> - For instructions on the different cell types, see "Appendix B: Cell-Specific Editing Guidelines" (page 16).
> - For mandatory dropdown lists, ensure that the value you require exists in NowForce.

4. Exit the cell by clicking elsewhere. Your update is saved automatically.

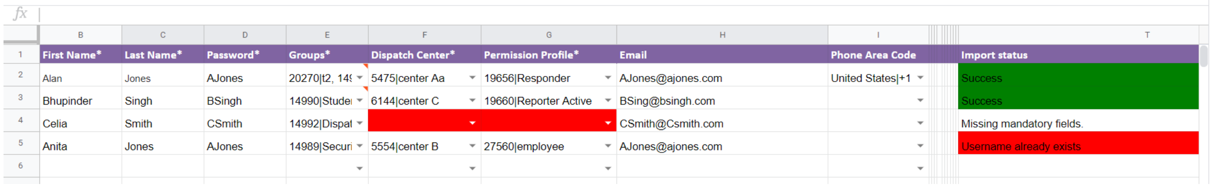
5. Upload the records by selecting **NowForce** > **Upload [Entity Name]**.



Performing Post-Upload Cleanup

After upload, the Import Status field for a record will display any of the following outcomes:

- Success - A green Import Status cell indicates that the row was uploaded successfully.
- Failure - If upload failed for the row, the error reason is displayed in the Import Status field together with an indication of the error in red anywhere in the row.
- Empty - Indicates that timeout occurred before the upload script reached this and subsequent records.



Delete all successful records and correct any that returned an error. Then upload the fixed and omitted records.

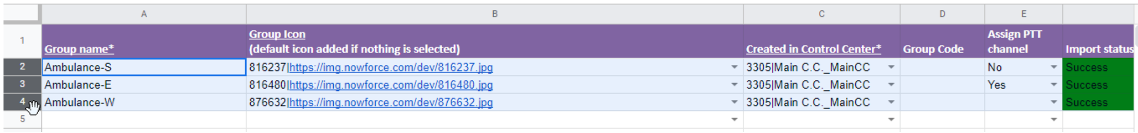
> Tip
> - If the error reason is unclear, open a ticket tor the NowForce Support Team with the error details.

- If all records were uploaded successfully, delete them all to prepare the spreadsheet for subsequent usage.

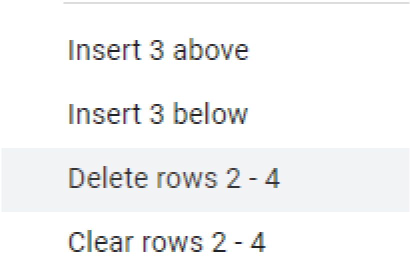
▼ To handle records following an upload

1. Highlight and delete successfully uploaded records:

   a. Click the row number of the top record and move the hand-shaped cursor downwards.



   b. Right click anywhere in the selection and choose **Delete rows**.



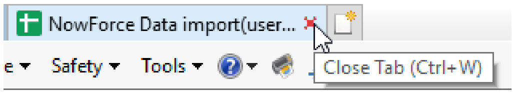
2. Upload the worksheet with the fixed and unloaded records. For details, see "Populating and Uploading a Worksheet" (page 11).

Exiting the Utility

After logging out you will no longer see the NowForce and Select Multiple Items menus, nor values in the dropdown lists. All changes made to the entity worksheets during the session are saved automatically.

Either of the following will log you out of the utility:

- Closing the tab.



- Logging into the system or mobile app with the same username.

Appendix A: Entity-Specific Upload Guidelines

When adding and uploading entities, pay attention to the following for each entity type.

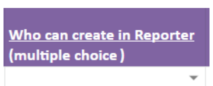
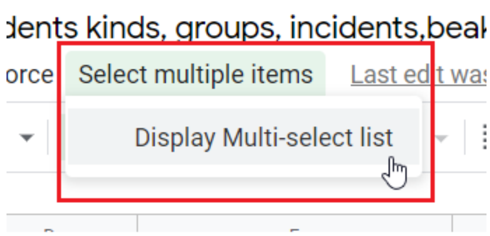
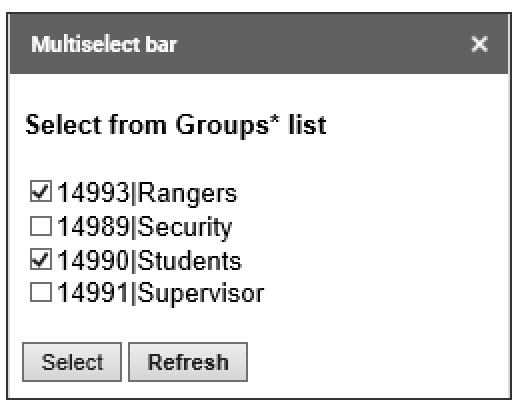
Entity Type	Prerequisites/Limitations	More Information
Upload Groups	• Upload **Groups** before uploading **Users**. • **Assign PTT Channel** - If empty, the default is No. • **Group Code** - Only accepts numeric values.	Creating New Groups
Upload Incident Types	• Upload **Incident Types** before uploading **Incidents**. • **Address**, **Latitude/Longitude** and **POI Location** - For details on dependencies between these cell values, see "Appendix B: Cell-Specific Editing Guidelines" (page 16).	Managing Incident Types
Upload Incidents	• **Alert Dispatchers on Creation/Activation** - If empty, the default is 'No'. • **Address, Latitude & Longitude, and POI Location** - For dependencies between these cells, see see "Appendix B: Cell-Specific Editing Guidelines" (page 16).	Creating a New Incident
Upload POIs	• Address and Latitude/Longitude - For dependencies between these cells, see "Appendix B: Cell-Specific Editing Guidelines" (page 16).	Adding and Managing Points of Interest (POIs)
Upload Beacons	• NowForce recommends Eddystone beacons. These are included by default in the utility.	NowForce Indoor Positioning Planning and Installation Guide
Upload Geofences	• Supports circular geofences with focal address and radius only. Point geofences are not supported.	Creating and Editing Geofences/ Areas of Interest (AOIs)

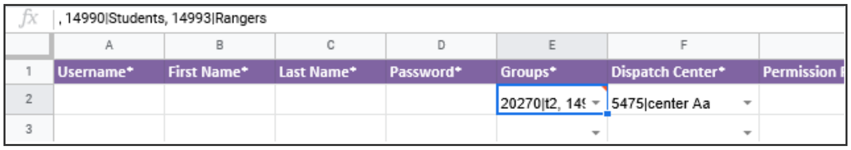
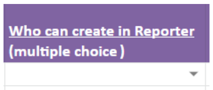
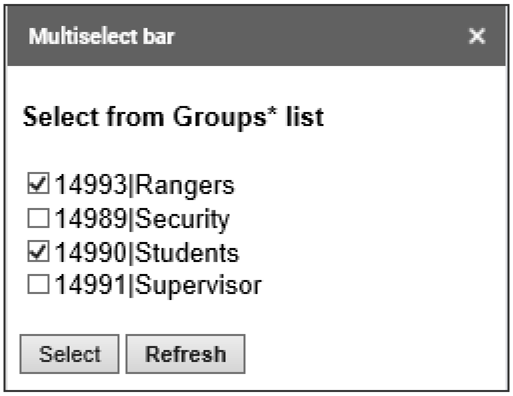
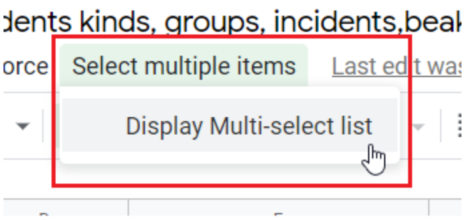
Upload Users	• Optionally change the following default values on the login page before upload:
	  • **Activate Users**
	  • **Send Email or SMS to Users**
		Adding and Managing Users

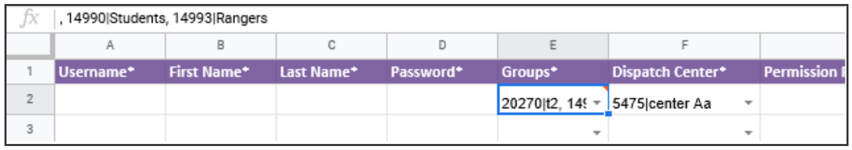
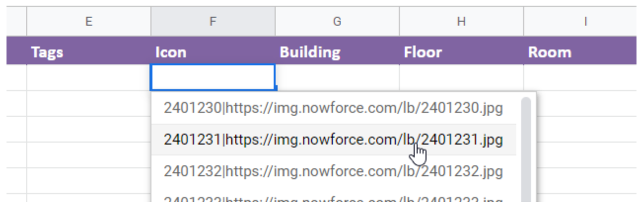
Entity Type	Prerequisites/Limitations	More Information
	For details, see "Changing Default User Settings (Optional)" (page 10). • The **Username** must be unique across all NowForce modules. • Control Center is not relevant for app users.	

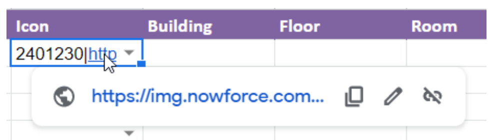
Appendix B: Cell-Specific Editing Guidelines

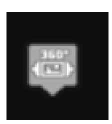
This table presents the different cell types and how to use them.

Cell Type	Usage
Mandatory  	Indicated by an asterisk in the column heading. Leaving these cells empty will give an error during upload.
Free text 	Select the cell and type a value. If a certain format is required, for example for adding a date, instructions are provided in the column heading.
Dropdown list - single choice 	• Click the arrow and select a value from the list. • For some dropdown lists values may differ according to user privileges.
Dropdown list - multiple choice 1  	Multiple Choice in the column header indicates that more than one value can be selected from a dropdown list. The options are listed in the Multiselect bar. To choose more than one option: 1. Select the cell. 2. Click **Select Multiple Options** > **Display Multiple Options** .  3. In the Multiselect bar:  a. If the bar still displays a previously selected list, click **Refresh**. b. Click the required values and then click **Select**.

Cell Type	Usage
	The values are listed in the text bar for the selected cell. 
Dropdown list - multiple choice 2  	Multiple Choice in the column header indicates that more than one value can be selected from a dropdown list. The options are listed in the Multiselect bar.  To choose more than one option: 1. If the Multiselect bar is not already open from a previous selection: a. Select the cell. b. Click **Select multiple options** > **Display Multi-select list**.  c. In the Multiselect bar, click the required values and then click **Select**. 2. If the Multiselect bar is open from a previous selection: a. Select the cell and then click **Refresh**. b. Click the relevant values and then click **Select**.

<table>
<tr><th>Cell Type</th><th>Usage</th></tr>
<tr><td></td><td>The values are listed in the text bar for the selected cell.

</td></tr>
<tr><td>Dropdown list - icons
</td><td>Icons are listed by JPEG filename. If no icon is selected, a default icon defined by your organization will be used.


To see an icon:
a. Select the filename from the dropdown list.
b. Hover over the link in the cell to display the edit bar.


c. Click the link in the edit bar to display the icon.
</td></tr>
<tr><td>Address, POI and Lattitude & Longitude fields</td><td>• Include city and country in the Address cell to minimize auto-correct errors and enhance accuracy.
• Adding an address auto-completes Latitude and Longitude if these cells are empty.
• If both the Address cell and Latitude and Longitude cells have values, Latitude and Longitude take precidence.</td></tr>
</table>