

BULK OPERATIONS



ENTRUST

SECURING A WORLD IN MOTION

Bulk Operations

Instant ID as a Service includes options to import multiple enrollment records by uploading an import ZIP file containing enrollment data. Instant ID as a Service parses the import file then creates enrollment records for each entry in the import file. Instant ID as a Service can also upload photographs and signature files for the applicants.

Prepare the ZIP Import File

The ZIP import file contains all the data including photographs and signatures for an applicant. Follow the guidelines in this section to prepare the ZIP import file.

Note: Instant ID as a Service limits the size of each enrollment including signature and photograph files to 5 MB.

Prepare the Photographs

The photograph files must be prepared in the following way to successfully upload photographs in an enrollment import.

- Photograph files must be in a folder named **Photos**.
- The import CSV file must contain a column called **Photo** that contains the file names of the photographs in the Photos folder.
- Photographs must be in jpeg image format.

Prepare the Signatures

The signature files must be prepared in the following way to successfully upload signatures in an enrollment import.

- Signature files must be in a folder named **Signatures**.
- The import CSV file must contain a column called **Signature** that contains the file names of the signatures in the **Signatures** folder.
- Signatures must be in jpeg image format.

Prepare the Import File

The import file is a comma separated value (CSV) file that contains applicant data and references to photographs and signatures. Follow the following guidelines when creating the import file.

Here is an example of a CSV import file:

Student ID	First Name	Last Name	Job Title	Prefix	Photo	Signature
1	Sarah	Sampleton	Staff	Ms.	photo1.jpg	signature1.jpg
2	Travis	Sampleson	Staff	Mr.	photo2.jpg	signature2.jpg
3	Mary	Exampleperson	Staff	Mrs.	photo3.jpg	signature3.jpg

Prepare the Import File

Follow these steps to create an import CSV file:

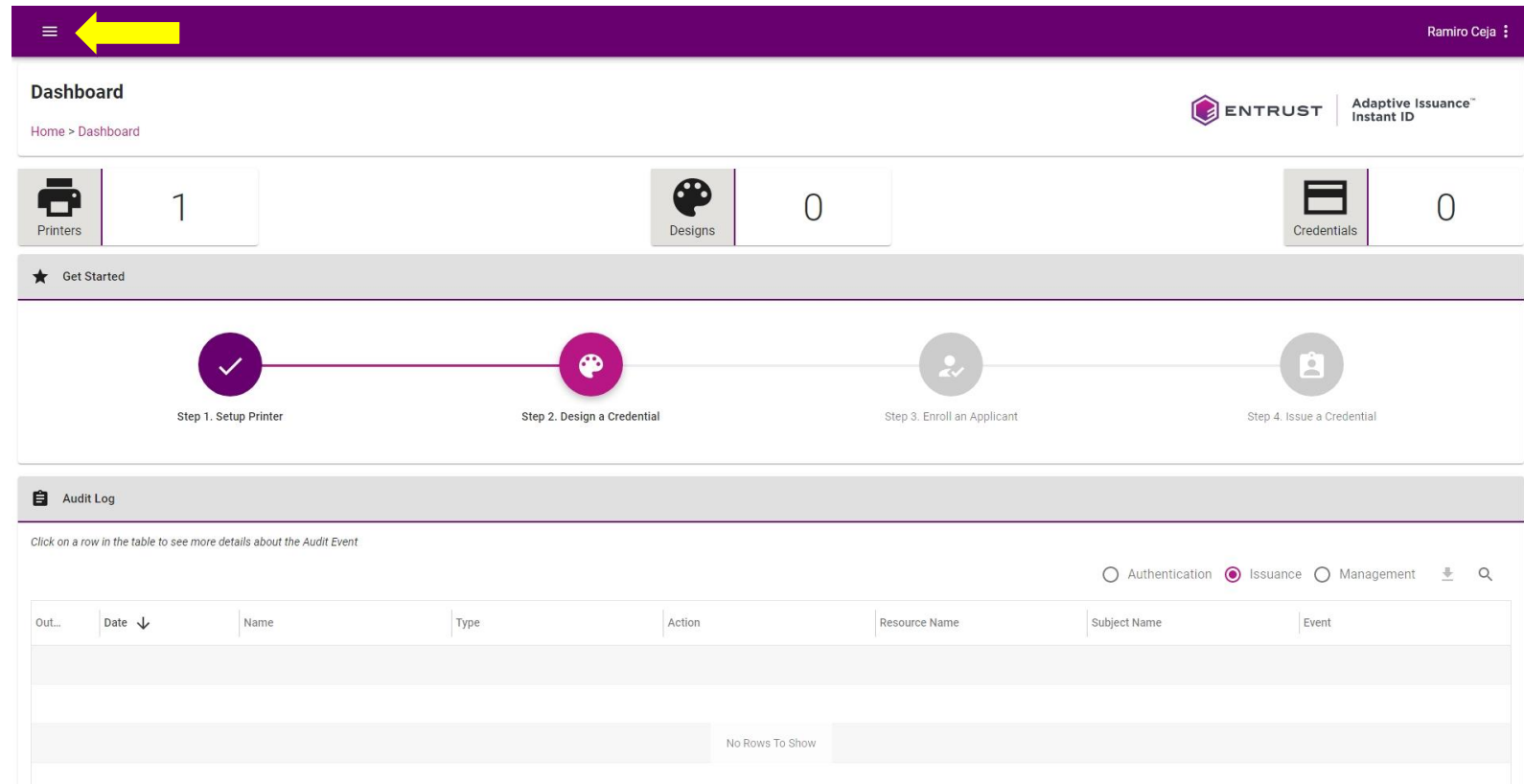
1. Create a new spreadsheet using Microsoft Excel.
2. Add a column for each field in the credential design. The names of the columns must match the names of the fields in the credential design exactly.
3. Create a column called Photo to import photographs.
4. Create a column called Signature to import signatures.
5. Enter applicant data in the columns.
6. In the Photo column, enter the file name of the photograph in the Photos folder.
7. In the Signature column, enter the file name of the signature file in the Signature folder.
8. Save the spreadsheet as a CSV file.

Prepare the ZIP File

1. Add the CSV import file, Photos folder, and Signature folder to a ZIP file.
2. Ensure that the ZIP file contains the following files and folders in this structure:
 - [CSVFileName].csv
 - Photos
 - [PhotographFileName1].JPG
 - [PhotographFileName2].JPG
 - [PhotographFileName3].JPG
 - Signature
 - [SignatureFileName1].JPG
 - [SignatureFileName2].JPG
 - [SignatureFileName3].JPG

Bulk Operations

To add a Bulk Operation, click on the **Main Menu** icon at the top left corner of the screen.



The screenshot displays the Entrust dashboard interface. At the top left, a yellow arrow points to the Main Menu icon (three horizontal lines). The dashboard includes a navigation bar with the user name 'Ramiro Ceja', the Entrust logo, and the text 'Adaptive Issuance™ Instant ID'. Below the navigation bar, there are three summary cards: 'Printers' with a count of 1, 'Designs' with a count of 0, and 'Credentials' with a count of 0. A 'Get Started' section follows, featuring a four-step process flow: Step 1. Setup Printer (completed), Step 2. Design a Credential (active), Step 3. Enroll an Applicant, and Step 4. Issue a Credential. Below this is an 'Audit Log' section with a table header and a search filter. The table has columns for Out..., Date, Name, Type, Action, Resource Name, Subject Name, and Event. The current state shows 'No Rows To Show'.

Dashboard

Home > Dashboard

ENTRUST Adaptive Issuance™ Instant ID

Printers 1

Designs 0

Credentials 0

★ Get Started

Step 1. Setup Printer

Step 2. Design a Credential

Step 3. Enroll an Applicant

Step 4. Issue a Credential

Audit Log

Click on a row in the table to see more details about the Audit Event

Authentication Issuance Management

Out...	Date ↓	Name	Type	Action	Resource Name	Subject Name	Event
No Rows To Show							

Bulk Operations

Select **Bulk Operations**.

Dashboard

Credentials

Credential Designs

Enrollment Designs

Mobile Flash Pass Designs

Printers

Print Queue

Bulk Operations

Administration

Bulk Operations

Home > Bulk Operations List

Quick filter...

<input type="checkbox"/>	Name	File Name	Type	State	Initiate Time ↓	Rows Successful	Rows Failed	Actions
No Rows To Show								

Rows per page: 10 Total: 0

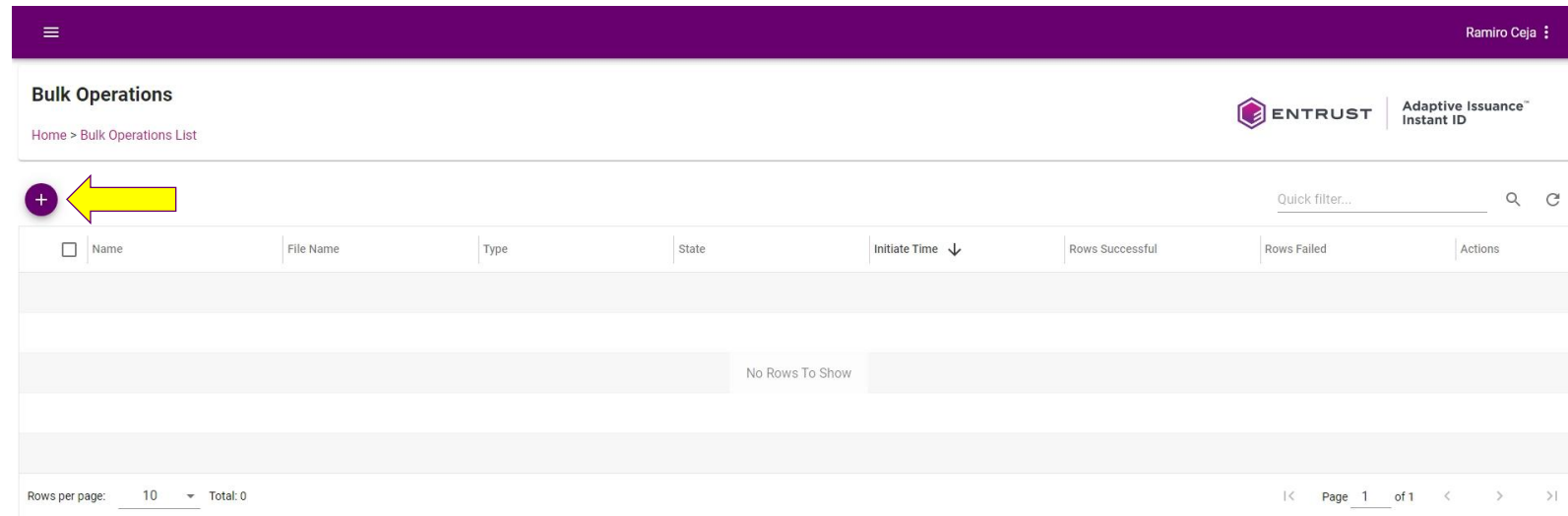
Page 1 of 1

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https://training2.us.dev.trustedauthdev.com/#/bulkoperations

Add a Bulk Operation

From the **Bulk Operations List** page, click on the **Add** icon.



The screenshot shows the 'Bulk Operations' page in the Entrust user interface. At the top right, the user's name 'Ramiro Ceja' is displayed. The page title is 'Bulk Operations' with a breadcrumb trail 'Home > Bulk Operations List'. The Entrust logo and 'Adaptive Issuance™ Instant ID' are in the top right corner. A purple circular button with a white plus sign, representing the 'Add' icon, is highlighted with a yellow arrow. Below this is a table with columns: Name, File Name, Type, State, Initiate Time (with a downward arrow), Rows Successful, Rows Failed, and Actions. The table is currently empty, displaying 'No Rows To Show'. At the bottom of the table area, it shows 'Rows per page: 10' and 'Total: 0'. A pagination bar at the bottom right indicates 'Page 1 of 1'.

Add a Bulk Operation

Select **Import** from the **Actions** list and **Enrollments** from the **Operations** list.

Home > Bulk Operations List

ENTRUST Adaptive Issuance™ Instant ID

Ramiro Ceja

1 Operation Setup 2 File to upload 3 Start/Stop

Actions: Import Operations: Enrollments

Enrollment Design: Action to select enrollment design

File Delimiter: Pipe (|) Comma (,)

Maximum Number of Retries: Five (5)

Name: Name of operation (Required)

Description: Describe operation

Sample Bulk File

```
# A bulk CSV file for bulk creating of enrollments must contain a column na
# the credential to use when creating an enrollment. The rest of the column
# values. The header of these columns specifies the name of the field as s
# In this sample, the credential is named My Credential and it contains thr
# and "Photo". Fields whose values are binary values like the Photo in thi
Credential,First Name,Last Name,Photo
My Credential,Julie,Doran,/9j/4AAQSkZJRgABAQAAAwBLAAD/4QCMRXhpZgAATU0AKgAAA
My Credential,Mark,Romano,/9j/4AAQSkZJRgABAQAAQQAQZAAD/4QCMRXhpZgAATU0AKgAAA
My Credential,Richard,Rosen,/9j/4AAQSkZJRgABAQAAFAAUAAD/4QCMRXhpZgAATU0AKgA
```

Add a Bulk Operation

A sample import file is displayed at the bottom of the screen for you to download optionally.

Home > Bulk Operations List

ENTRUST Adaptive Issuance™ Instant ID

Ramiro Ceja

1 Operation Setup 2 File to upload 3 Start/Stop

Actions: Import Operations: Enrollments

Enrollment Design: Action to select enrollment design

File Delimiter: Pipe (|) Comma (,)

Maximum Number of Retries: Five (5)

Name: Name of operation (Required)

Description: Describe operation

Sample Bulk File

```
# A bulk CSV file for bulk creating of enrollments must contain a column name
# the credential to use when creating an enrollment. The rest of the columns
# values. The header of these columns specifies the name of the field as $
# In this sample, the credential is named My Credential and it contains the
# and "Photo". Fields whose values are binary values like the Photo in this
Credential,First Name,Last Name,Photo
My Credential,Julie,Doran,/9j/4AAQSkZJRgABAQAAwBlAAAD/4QCMRxpZgAATU0AKgAAA
My Credential,Mark,Romano,/9j/4AAQSkZJRgABAQAAQQAQAAAD/4QCMRxpZgAATU0AKgAAA
My Credential,Richard,Rosen,/9j/4AAQSkZJRgABAQAAFAAUAAAD/4QCMRxpZgAATU0AKgAA
```

Upload Enrollment Records

To upload enrollment records:

- Select the **Enrollment Design**.
- Select the **File Delimiter**.
- From the **Maximum Number of Retries** list select the number of retries allowed after an import error.
- Enter a name for the operation in the **Name** field.
- Enter a description of the bulk operation in the **Description** field (optional).

The screenshot displays the 'Add Bulk Operation' page in a web application. The page has a purple header with a menu icon on the left and the user name 'Ramiro Ceja' on the right. Below the header, the page title is 'Add Bulk Operation' and the breadcrumb is 'Home > Bulk Operations List'. The main content area is titled 'Operation Setup' and includes a progress indicator with three steps: 1. Operation Setup (active), 2. File to upload, and 3. Start/Stop. The form contains several fields: 'Actions' set to 'Import', 'Operations' set to 'Enrollments', 'Enrollment Design' set to 'Entrust', 'File Delimiter' with radio buttons for 'Pipe (|)' and 'Comma (,)' (the latter is selected), 'Maximum Number of Retries' set to 'Five (5)', 'Name' set to 'Entrust', and a 'Description' field with the placeholder text 'Describe operation'. Below these fields is a 'Sample Bulk File' section containing a code block with a CSV header and three rows of data.

```
# A bulk CSV file for bulk creating of enrollments must contain a column na
# the credential to use when creating an enrollment. The rest of the column
# values. The header of those columns specifies the name of the field as s
# In this sample, the credential is named My Credential and it contains thr
# and "Photo". Fields whose values are binary values like the Photo in thi
Credential,First Name,Last Name,Photo
My Credential,Julie,Doran,/9j/4AAQSkZJRgABAQAAAwBLAAD/4QCMRXhpZgAATU0AKgAAA
My Credential,Mark,Romano,/9j/4AAQSkZJRgABAQAAQGAZAAAD/4QCMRXhpZgAATU0AKgAAA
My Credential,Richard,Rosen,/9j/4AAQSkZJRgABAQAAFAAUAAAD/4QCMRXhpZgAATU0AKgA
```

Upload Enrollment Records

Click on **INITIATE**.

Import Enrollments

Enrollment Design
Entrust

File Delimiter
 Pipe (|)
 Comma (,)

Maximum Number of Retries
Five (5)

Name
Entrust

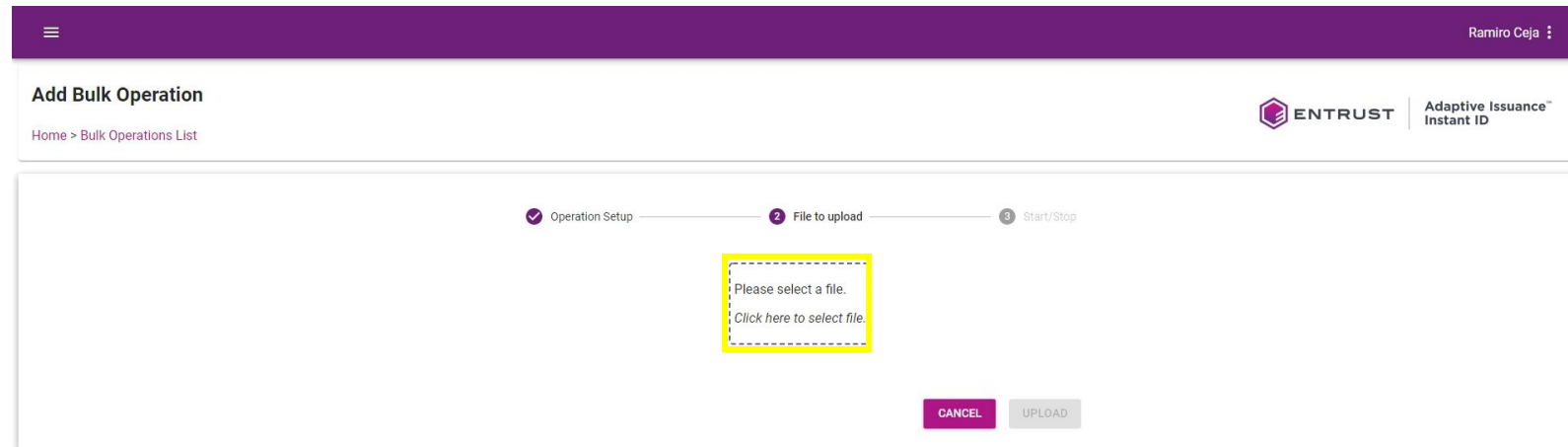
Description
Describe operation

Sample Bulk File

```
# A bulk CSV file for bulk creating of enrollments must contain a column na  
# the credential to use when creating an enrollment. The rest of the column  
# values. The header of those columns specifies the name of the field as s  
# In this sample, the credential is named My Credential and it contains thr  
# and "Photo". Fields whose values are binary values like the Photo in thi  
Credential,First Name,Last Name,Photo  
My Credential,Julie,Doran,/9j/4AAQSkZJRgABAQAAAwBLAAD/4QCMRXhpZgAATU0AKgAAA  
My Credential,Mark,Romano,/9j/4AAQSkZJRgABAQAAGQAZAAD/4QCMRXhpZgAATU0AKgAAA  
My Credential,Richard,Rosen,/9j/4AAQSkZJRgABAQAFAAUAAAD/4QCMRXhpZgAATU0AKgA
```

Upload Enrollment Records

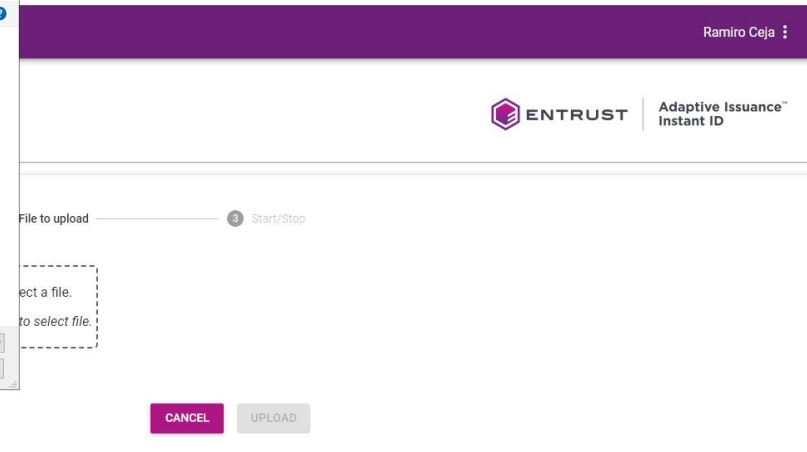
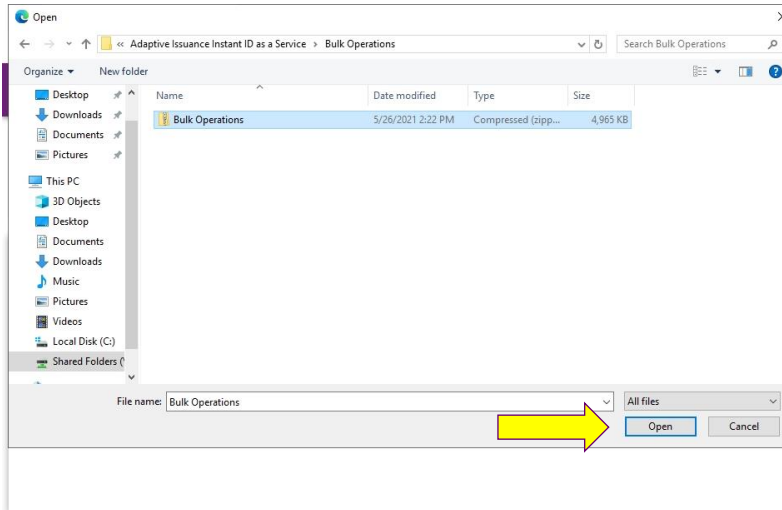
Click in the upload area.



The screenshot shows a web interface for 'Add Bulk Operation'. At the top, there is a purple navigation bar with a menu icon and the user name 'Ramiro Ceja'. Below the navigation bar, the page title 'Add Bulk Operation' is displayed, along with a breadcrumb 'Home > Bulk Operations List'. The ENTRUST logo and 'Adaptive Issuance™ Instant ID' are visible in the top right corner. A progress indicator shows three steps: '1 Operation Setup' (completed), '2 File to upload' (current step), and '3 Start/Stop'. A dashed box highlights the text 'Please select a file. Click here to select file.' in the center of the page. At the bottom right, there are two buttons: 'CANCEL' and 'UPLOAD'.

Upload Enrollment Records

Select the ZIP file and click on **Open**.



Upload Enrollment Records

Click on **UPLOAD**.

The screenshot shows a web interface for adding bulk operations. At the top, there is a purple navigation bar with a menu icon and the user name 'Ramiro Ceja'. Below this, the page title is 'Add Bulk Operation' with a breadcrumb 'Home > Bulk Operations List'. The ENTRUST logo and 'Adaptive Issuance™ Instant ID' are in the top right. A progress indicator shows three steps: '1 Operation Setup' (checked), '2 File to upload' (current), and '3 Start/Stop'. A dashed box contains the text 'Bulk Operations.zip' and 'Click here to select file.'. At the bottom right, there are two buttons: 'CANCEL' and 'UPLOAD'. A yellow arrow points to the 'UPLOAD' button.

Upload Enrollment Records

Review the details of the bulk operation and click on **START**.

Home > Bulk Operations List

Operation Setup — File to upload — **Start/Stop**

Click START to IMPORT information from **File: Bulk Operations.zip**. Click CANCEL to stop operation.

Type: Enrollments
Delimiter: ,
Name: Entrust

BACK CANCEL **START**

Upload Enrollment Records

Click on **FINISHED**.

Home > Bulk Operations List

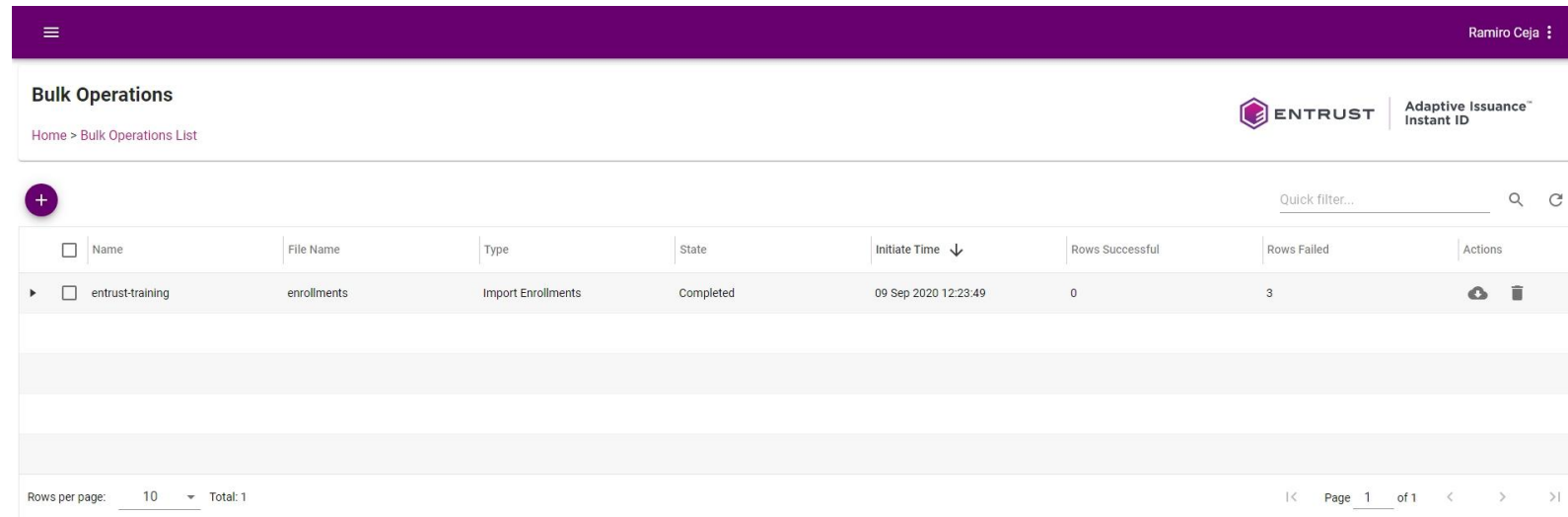
Operation Setup — File to upload — Start/Stop

Click 'FINISHED' to return to List.

FINISHED

Bulk Operations

The **Bulk Operations List** page, displays the status of the import process.

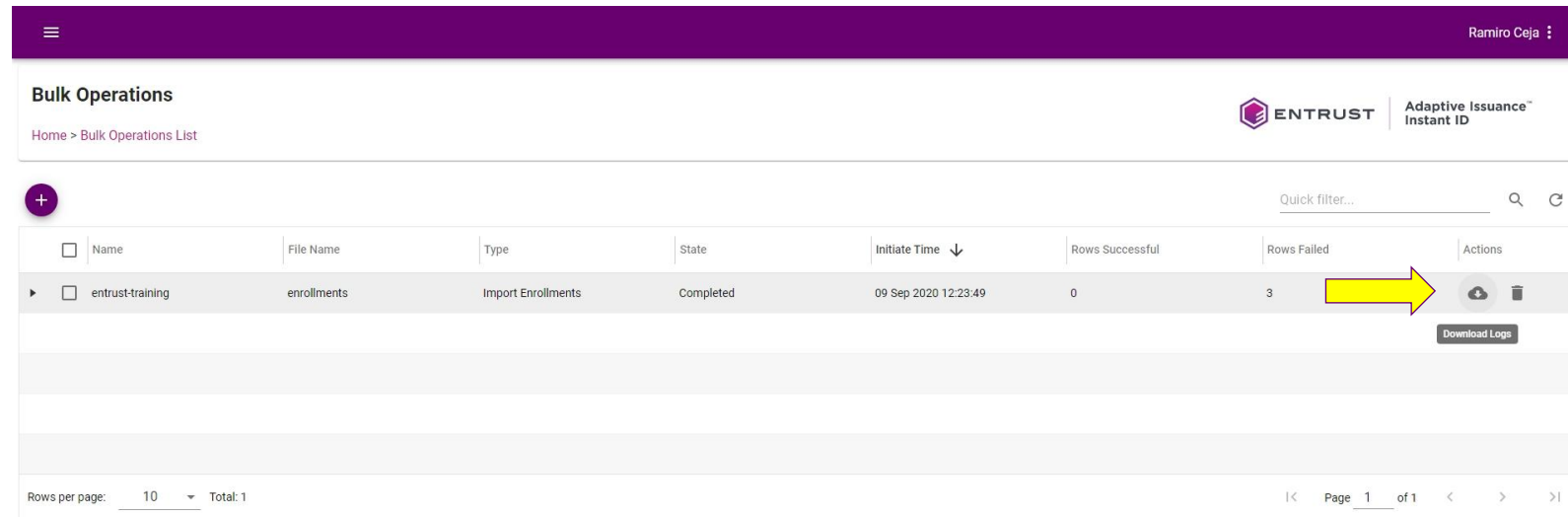


The screenshot displays the 'Bulk Operations List' page. At the top, there is a purple navigation bar with a menu icon and the user name 'Ramiro Ceja'. Below this, the page title 'Bulk Operations' is shown, along with the breadcrumb 'Home > Bulk Operations List' and the Entrust logo with the text 'Adaptive Issuance™ Instant ID'. A search bar labeled 'Quick filter...' is located on the right. The main content is a table with the following columns: Name, File Name, Type, State, Initiate Time, Rows Successful, Rows Failed, and Actions. A single row is visible with the following data: Name: entrust-training, File Name: enrollments, Type: Import Enrollments, State: Completed, Initiate Time: 09 Sep 2020 12:23:49, Rows Successful: 0, Rows Failed: 3. The table includes a plus icon for adding new operations and a trash icon for deleting existing ones. At the bottom of the table, there is a pagination control showing 'Rows per page: 10' and 'Total: 1', along with navigation arrows and 'Page 1 of 1'.



<input type="checkbox"/>	Name	File Name	Type	State	Initiate Time ↓	Rows Successful	Rows Failed	Actions
▶ <input type="checkbox"/>	entrust-training	enrollments	Import Enrollments	Completed	09 Sep 2020 12:23:49	0	3	

Bulk Operations

To download import enrollment operation logs, click on the **Download Logs** icon.



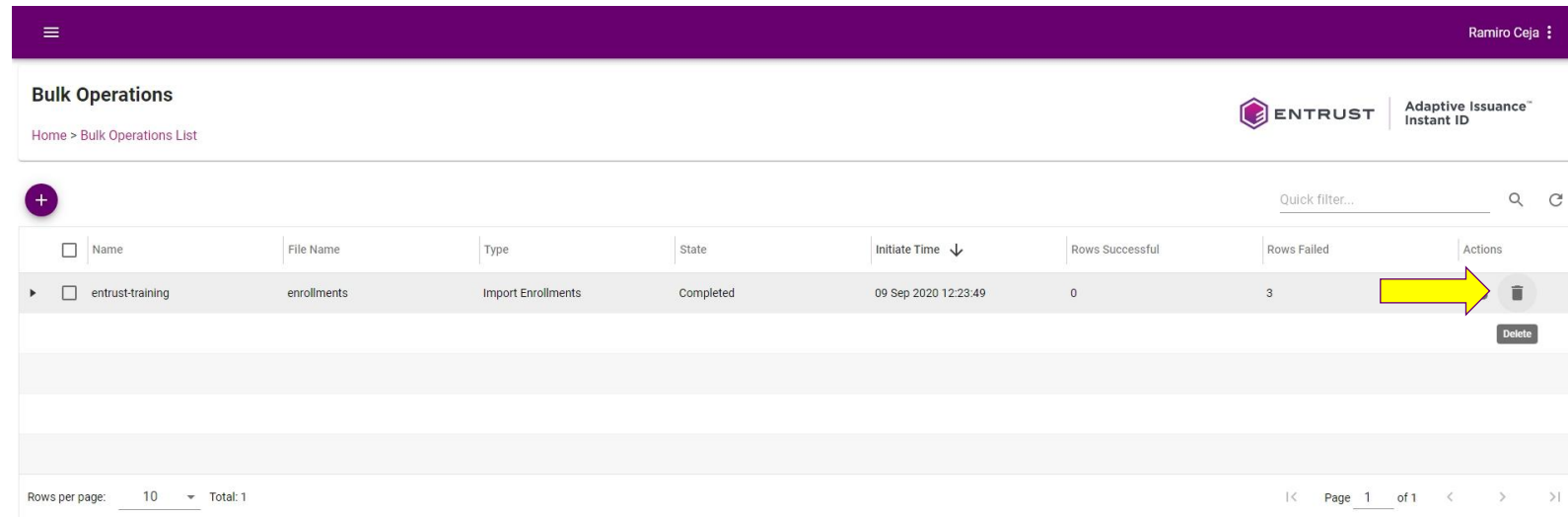
The screenshot displays the 'Bulk Operations' page in a web application. The page header includes the user name 'Ramiro Ceja' and the 'ENTRUST Adaptive Issuance Instant ID' logo. Below the header, there is a breadcrumb trail 'Home > Bulk Operations List'. A search bar labeled 'Quick filter...' is present. The main content is a table with the following columns: Name, File Name, Type, State, Initiate Time, Rows Successful, Rows Failed, and Actions. A single row is visible with the following data: Name: entrust-training, File Name: enrollments, Type: Import Enrollments, State: Completed, Initiate Time: 09 Sep 2020 12:23:49, Rows Successful: 0, Rows Failed: 3. A yellow arrow points to the 'Actions' column for this row, which contains a cloud download icon and a trash icon. A 'Download Logs' button is located below the table. At the bottom of the table, there is a pagination control showing 'Rows per page: 10' and 'Total: 1'. The footer of the page contains copyright information: 'Copyright 2020 Entrust Limited © All rights reserved. Terms of Service Privacy Statement Open Source Software Copyright Notice Build' and the 'ENTRUST' logo.

<input type="checkbox"/>	Name	File Name	Type	State	Initiate Time ↓	Rows Successful	Rows Failed	Actions
<input type="checkbox"/>	entrust-training	enrollments	Import Enrollments	Completed	09 Sep 2020 12:23:49	0	3	 


Rows per page: 10 Total: 1 Page 1 of 1

Bulk Operations

To delete import enrollment operations, click on the **Delete** icon.

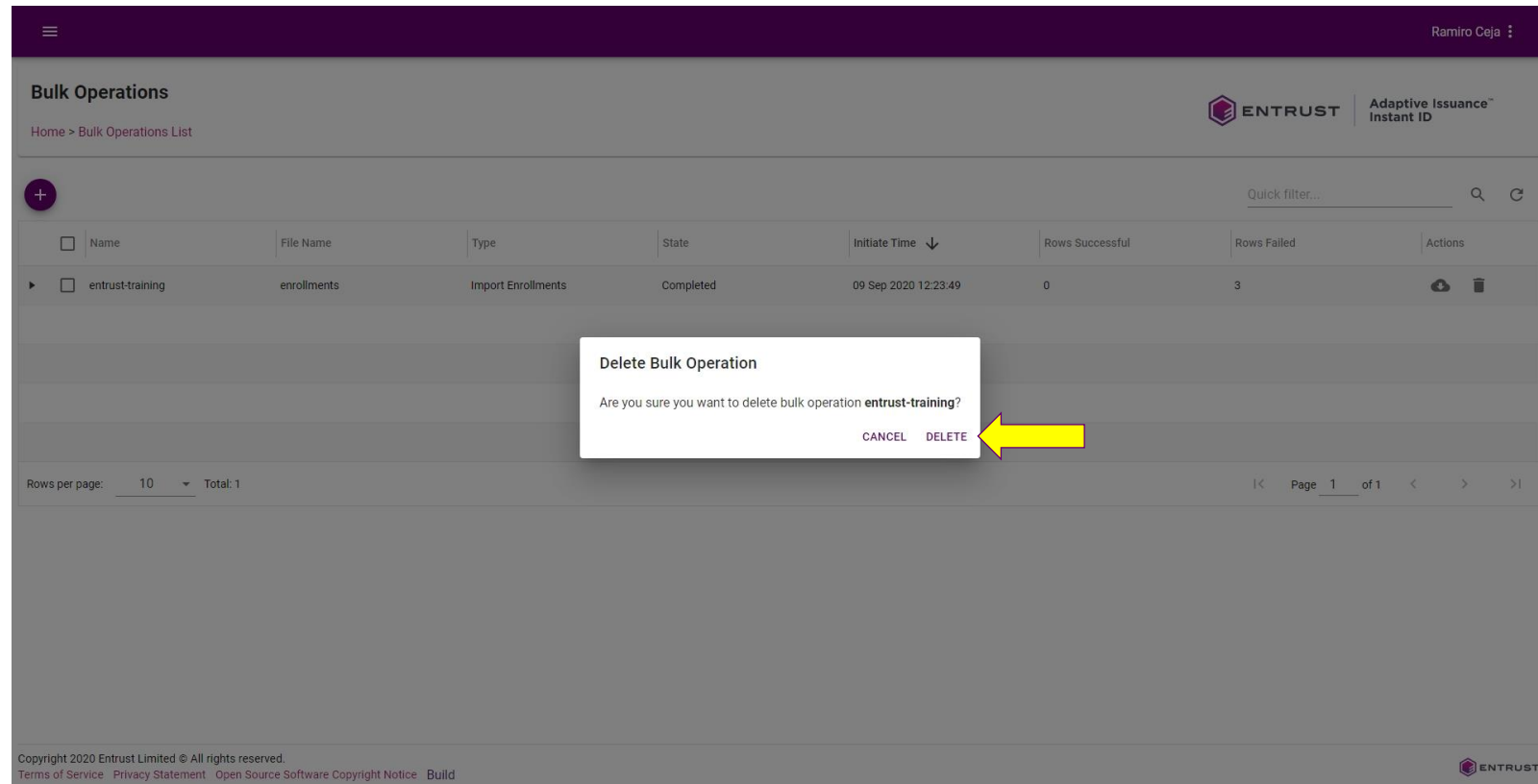


The screenshot shows the 'Bulk Operations' page in the Entrust system. The page header includes the Entrust logo and 'Adaptive Issuance Instant ID'. The main content area features a table with the following columns: Name, File Name, Type, State, Initiate Time, Rows Successful, Rows Failed, and Actions. A single row is visible with the following data: Name: entrust-training, File Name: enrollments, Type: Import Enrollments, State: Completed, Initiate Time: 09 Sep 2020 12:23:49, Rows Successful: 0, Rows Failed: 3. A yellow arrow points to the 'Delete' icon in the Actions column of this row. The footer of the table shows 'Rows per page: 10 Total: 1' and 'Page 1 of 1'.

<input type="checkbox"/>	Name	File Name	Type	State	Initiate Time ↓	Rows Successful	Rows Failed	Actions
<input type="checkbox"/>	entrust-training	enrollments	Import Enrollments	Completed	09 Sep 2020 12:23:49	0	3	 Delete

Bulk Operations

If you are sure that you want to delete the bulk operation, click on **DELETE**.



The screenshot displays the 'Bulk Operations' page in the Entrust system. A table lists a single bulk operation named 'entrust-training'. A modal dialog box is open, asking for confirmation to delete this operation. A yellow arrow points to the 'DELETE' button in the dialog.

Name	File Name	Type	State	Initiate Time	Rows Successful	Rows Failed	Actions
entrust-training	enrollments	Import Enrollments	Completed	09 Sep 2020 12:23:49	0	3	[Refresh] [Delete]

Delete Bulk Operation

Are you sure you want to delete bulk operation **entrust-training**?

CANCEL DELETE

Rows per page: 10 Total: 1 Page 1 of 1

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Bulk Operations

The bulk operation is deleted.

The screenshot displays the 'Bulk Operations' page in the Entrust system. The page header includes the Entrust logo and 'Adaptive Issuance™ Instant ID'. The breadcrumb trail shows 'Home > Bulk Operations List'. A table with columns for Name, File Name, Type, State, Initiate Time, Rows Successful, Rows Failed, and Actions is shown, but it is empty with the message 'No Rows To Show'. A success message at the bottom states 'Bulk operation entrust-training deleted.' The footer contains copyright information for Entrust Limited and various links.

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