Job Aid:

Step-by-Step Instructions Importing Users



August 2014

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Section 1: Importing Users

This brief guide details the process of importing users into OnPoint and includes step-by-step directions, associated screen images and answers to common questions related to this task. This process is only used for creating <u>new</u> user accounts. The import routine does not update existing user data.

Step-by Step Instructions to Importing Users

- 1. Log into OPPortal using a Site Administrator login.
- 2. Select Course Manager.
- 3. Select Administration (1) > Import / Export (2) > Import Data (3). (Figure 1)

🖸 Home 🔂 Help 🖾 Logout 🛛 🖉 Us	ers & Groups	Content	Assessments	Skills & Games	Events & Activities	Notifications Administration
ONPOINT MANAGER						Categories
Velcome to the Learning Server Course Manage	ar.					Catalogs
	4.).					Mobile Shortcuts
Working Customer						Certifications
Working Customer: OnPoint Digital, Inc.						Page Layouts
Login Information						Time Zones
Logged in as: OnPoint, Administrator					Administra	Global Glossary
Pending						Configuration
Course requests pending approval	None					CellCast
Assessment Set requests pending approv	al: None					Content Authors
Nugget requests pending approval	None					Custom Fields
Event registrations pending approval:	Approve					Thumbnails & Badges
User activity completions:	Approve	1				Publish
Delete requests pending:	Process	5				Ucensing
My Media file uploads pending:	Downlo	ad				Deletion Tasks
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4. Select Import Users. (Figure 2)

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annes //		1					
Import	File Type	Description					
Import Import Users	File Type CSV Re (comma/quote	Description	m a CSV (comm	a/quote) text file			

Figure 2

Prepare the user import file by downloading the sample import file (OnPointUserImport.xls) from the User Import page, which is an Excel spreadsheet with pre-defined user table column names, required fields and instructions. (Figure 3)

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You may also optionally assign all of the	imported users to a se	elected aro	up and/or course				

Figure 3

Additionally, the required fields and table column names are as follows:

Required Field	Table Column Name	Comments
User's given name	user_first_name	
User's family name	user_last_name	
Unique user login ID	user_login	The login ID may be a name, number or any combination of characters.
User's login password	user_password	The password should be at least 5 characters in length (configurable)
User's time zone	user_timezone	Time zones must be set as US/Eastern, US/Central, US/Mountain, or US/Pacific.
User's status	status	The user's status may be set to Active, Inactive or Deleted
Account expiration	account_expires	The account expiration date should use the MM/DD/YYYY format. If no expiration date is desired, NEVER may be entered for this value.

Table 1

When reviewing the sample import file below, you may read additional comments regarding optional fields and instructions on populating the sample import file (Figure 4). After inserting the user data into the spreadsheet, delete all rows and columns which fall outside of the spreadsheet range of the user data. In order to be uploaded, the final file must include only column headers and user data, utilize a file name which includes no spaces or special characters, and be saved in the CSV format.

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Figure 4

5. Select **Browse**, navigate the path to the location of the import file and select the file. (Figure 5)

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You may also optionally assign all of th	e imported users to a si	elected aro	up and/or course				

Figure 5

6. Select Import Users. (Figure 6)

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ou may also optionally assign all of the Assign to Group: - None - Assign to Course: - None - Mobile Resistration Code:	imported use	rs to a selected g	roup and/or course ry Group	2			

Figure 6

The results of the import process will be displayed when the process has completed. Note that any user login which already exists in the server database, even if related to a different Customer/Slice, will be skipped in the import process. (Figure 7)

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Assign to Course:							
- None -			~				
Mobile Registration Code							
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Academical Interest							
Import Users O Cancel				-			

Figure 7

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User Import Options

When importing users, you may make group and/or course assignments, as well as generate Mobile Registration Codes, for all users imported into OnPoint during the user import process. Each of these options is accomplished by making additional selections from the User Import page <u>before</u> selecting Import Users as the final step of the import process. Additionally, any of these options may be combined for a single import file, if desired. For example, you may wish to make a group assignment, a course assignment and generate mobile registration codes for a list of imported users in a single import process. However, you may not select multiple groups or courses for a single import process.

Assigning Group Membership to Imported Users

You may assign all of the users on an import list to a given group, as follows:

1. Select **Browse**, navigate the path to the location of the import file and select the file. (Figure 5)



Figure 5

2. Select the group to be assigned to the imported users from the Assign to Group dropdown box. (Figure 8)

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Figure 8

3. If you would like the selected group to be the Primary Group for all imported users, select the **Make Primary Group** checkbox. Otherwise, do not select this checkbox. (Figure 9)

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Figure 9

4. Select Import Users. (Figure 10)

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Mobile Registration Code:							
- None -					×		
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Figure 10

Assigning a Course to Imported Users

You may assign all of the users on an import list to a given course, as follows:

1. Select Browse, navigate the path to the location of the import file and select the file. (Figure 5)

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Figure 5

2. Select the course to be assigned to the imported users from the Assign to Course dropdown box. (Figure 11)



Figure 11

3. Select Import Users. (Figure 12)





Generating Mobile Registration Codes for Imported Users

You may generate Mobile Registration Codes for all of the users on an import list, as follows:

1. Select Browse, navigate the path to the location of the import file and select the file. (Figure 5)

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User Import File Name: C-Wsers'Robert'Desktop'user Import	2 csr 2				Browse	1	

Figure 5

2. Using the **Mobile Registration Code** dropdown box, select the desired registration option (at this time all users will be forced to change their password). Additionally, you may set the date when OnPoint will generate the registration codes, the expiration of the registration code (in hours), and the communication options for delivering the registration code (Email, SMS or both). (Figure 13)

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Mobile Registration Code						
User will be forced to change t	hele password (This optic	e will result the unter's car	ent password in their	user account) 😪		
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Figure 13

Mobile registration codes make it very easy to tie a user's account within the LMS to a mobile device. Note the registration codes may only be used once. If a user attempts to use a mobile registration code after the expiration date, OnPoint will generate an error message indicating the registration code is invalid.

3. Select Import Users. (Figure 14)

ADMINISTRATION: USER IMPORT This satisfy is used to import development information into the Learning Sener. The user import file must be a standard CSV field fine of the import file must be specified in any otder. See help for details regarding the calum specified user table, specified, Columns may be specified in any otder. See help for details, regarding the calum specified user table column names. Click CnPointIseImport in to view or download an Excel spreadsteet with the pro-defined user table column names. Dear inport File Name Clicks on PointIseImport in to view or download an Excel spreadsteet with the pro-defined user table column names. Noting to Gings - None - - Note - - None - - Mobile Reginitation Code	tommalgeote delivitied; text Sie. The All regulard columns must be
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Mobile Registration Code	
User will be forced to change their password (This option will reset the user's current pasaword in their user account).	2 10
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Figure 14