

# Job Aid: Step-by-Step Instructions Importing Users



August 2014

# Table of Contents

Section 1: Importing Users .....	1
Step-by Step Instructions to Importing Users .....	1
User Import Options.....	4
Assigning Group Membership to Imported Users.....	4
Assigning a Course to Imported Users .....	5
Generating Mobile Registration Codes for Imported Users.....	6

## 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 new 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)

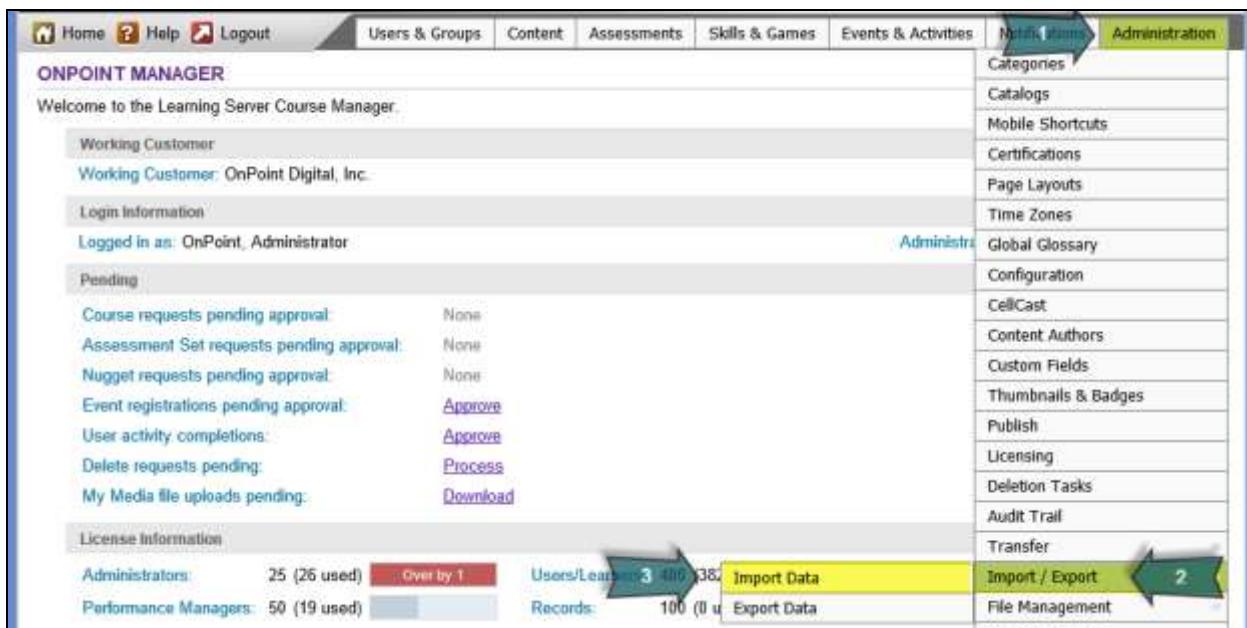


Figure 1

4. Select **Import Users**. (Figure 2)

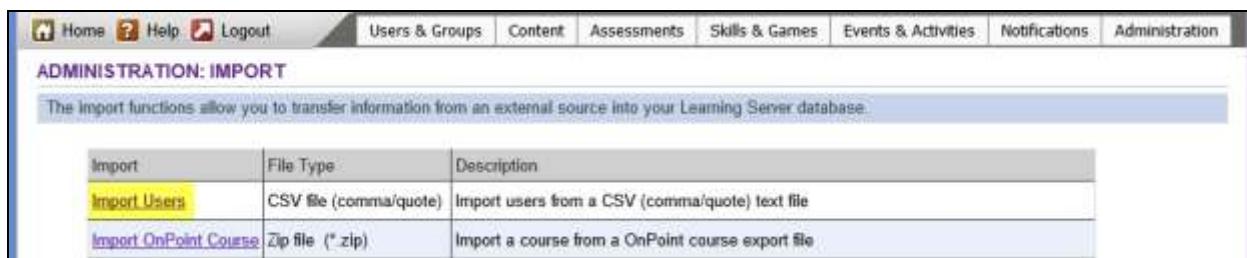


Figure 2

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)

This utility is used to import user/learner information into the Learning Server. The user import file must be a standard CSV (comma/quote delimited) text file. The first line of the import file must contain the correct column (field) names from the Learning Server database 'tbl\_user' table. All required columns must be specified. Columns may be specified in any order. See help for details regarding the column specifications.

Click [OnPointUserImport.xls](#) to view or download an Excel spreadsheet with the pre-defined user table column names.

User Import File Name:  [Browse...](#)

You may also optionally assign all of the imported users to a selected group 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.

Before importing data with this template, please delete everything but the data! This file also must contain the user\_email field of column sixteen. The columns marked REQUIRED for example: user\_email must be included. All others are optional.

user_first_name	user_last_name	user_email	user_organization	user_address	user_phone	user_login	user_password	password_hex	user_timezone	role_id	phone	mobile
REQUIRED	REQUIRED	REQUIRED	User's organization or company name	User's address Street, City, State, Zip	User's email address	REQUIRED Unique user login ID The login ID may be a name, number or any combination of characters	REQUIRED User's login password The password should be at least 5 characters in length	REQUIRED Password hint This hint should be at least 8 characters in length	REQUIRED User's time zone Time zones must be set as one of the following: eastern central mountain pacific	Users role Either User or Learner	Phone number	Mobile number
You can also specify a time zone as the number of hours from GMT. For example -5 for eastern												

Figure 4

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

This utility is used to import user/learner information into the Learning Server. The user import file must be a standard CSV (comma/quote delimited) text file. The first line of the import file must contain the correct column (field) names from the Learning Server database 'tbl\_user' table. All required columns must be specified. Columns may be specified in any order. See help for details regarding the column specifications.

Click [OnPointUserImport.xls](#) to view or download an Excel spreadsheet with the pre-defined user table column names.

User Import File Name: C:\Users\Robert\Desktop\user\_import2.csv

You may also optionally assign all of the imported users to a selected group and/or course.

Figure 5

## 6. Select Import Users. (Figure 6)

This utility is used to import user/learner information into the Learning Server. The user import file must be a standard CSV (comma/quote delimited) text file. The first line of the import file must contain the correct column (field) names from the Learning Server database 'tbl\_user' table. All required columns must be specified. Columns may be specified in any order. See help for details regarding the column specifications.

Click [OnPointUserImport.xls](#) to view or download an Excel spreadsheet with the pre-defined user table column names.

User Import File Name: C:\Users\Robert\Desktop\user\_import2.csv

You may also optionally assign all of the imported users to a selected group and/or course.

Assign to Group: - None -  Make Primary Group

Assign to Course: - None -

Mobile Registration Code: - None -

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)

This utility is used to import user/learner information into the Learning Server. The user import file must be a standard CSV (comma/quote delimited) text file. The first line of the import file must contain the correct column (field) names from the Learning Server database 'tbl\_user' table. All required columns must be specified. Columns may be specified in any order. See help for details regarding the column specifications.

Click [OnPointUserImport.xls](#) to view or download an Excel spreadsheet with the pre-defined user table column names.

User Import File Name:

You may also optionally assign all of the imported users to a selected group and/or course.

Assign to Group: - None -  Make Primary Group

Assign to Course: - None -

Mobile Registration Code: - None -

CSV file 'user\_import2.csv' imported, 1 user(s) added, 1 duplicate user(s) skipped

Figure 7

### 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 before 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)

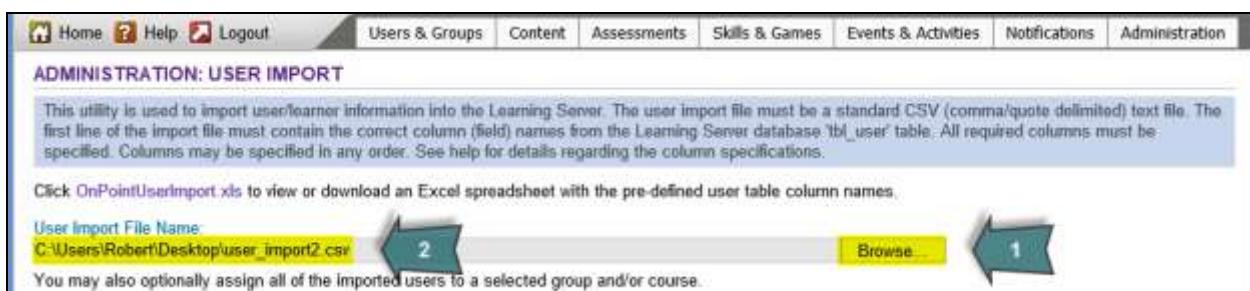


Figure 5

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

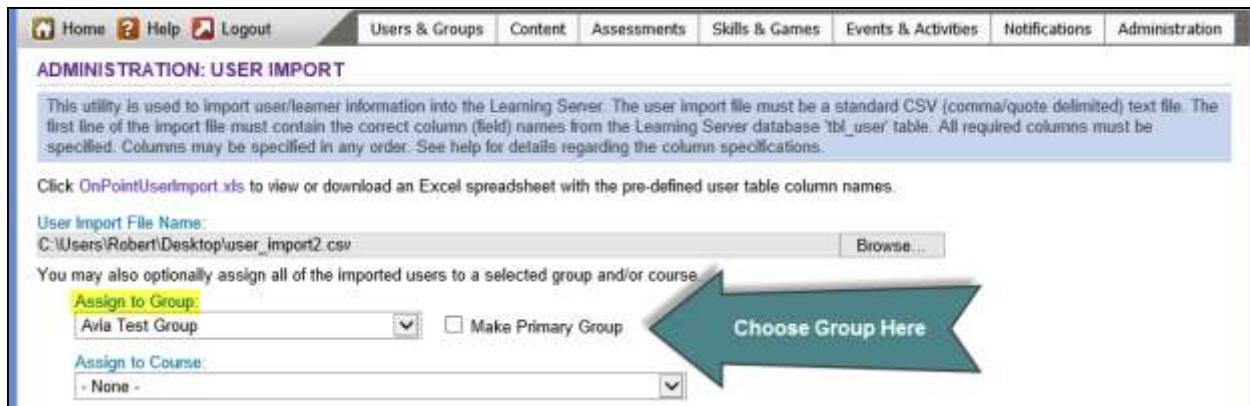


Figure 8

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)

The screenshot shows the 'ADMINISTRATION: USER IMPORT' page. At the top, there are navigation links: Home, Help, Logout, Users & Groups, Content, Assessments, Skills & Games, Events & Activities, Notifications, and Administration. Below the navigation is a section titled 'ADMINISTRATION: USER IMPORT' with a descriptive message about importing user/learner information into the Learning Server. It mentions that the user import file must be a standard CSV (comma/quote delimited) text file and specifies that the first line of the import file must contain the correct column (field) names from the Learning Server database 'tbl\_user' table. All required columns must be specified. Columns may be specified in any order. A link to 'OnPointUserImport.xls' is provided to view or download an Excel spreadsheet with pre-defined user table column names. The 'User Import File Name' field contains 'C:\Users\Robert\Desktop\user\_import2.csv'. Below this, there is a note: 'You may also optionally assign all of the imported users to a selected group and/or course.' Two dropdown menus are shown: 'Assign to Group' (set to 'Avia Test Group') and 'Assign to Course' (set to '- None -'). A yellow box highlights the 'Make Primary Group' checkbox, which is currently unchecked. A large green arrow points to this checkbox with the text 'Select Checkbox for Primary Group'.

Figure 9

4. Select Import Users. (Figure 10)

The screenshot shows the same 'ADMINISTRATION: USER IMPORT' page as Figure 9. The 'Assign to Group' dropdown is now highlighted with a yellow box and set to 'Avia Test Group'. The 'Make Primary Group' checkbox is checked. The 'Assign to Course' dropdown is set to '- None -'. Below these fields are two more dropdowns: 'Mobile Registration Code' (set to '- None -') and 'Import Users' (highlighted with a yellow box). There is also a 'Cancel' button. The 'Import Users' button is the primary focus of the screenshot.

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)

**ADMINISTRATION: USER IMPORT**

This utility is used to import user/learner information into the Learning Server. The user import file must be a standard CSV (comma/quote delimited) text file. The first line of the import file must contain the correct column (field) names from the Learning Server database 'tbl\_user' table. All required columns must be specified. Columns may be specified in any order. See help for details regarding the column specifications.

Click [OnPointUserImport.xls](#) to view or download an Excel spreadsheet with the pre-defined user table column names.

User Import File Name: C:\Users\Robert\Desktop\user\_import2.csv

You may also optionally assign all of the imported users to a selected group and/or course.

Figure 5

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

**ADMINISTRATION: USER IMPORT**

This utility is used to import user/learner information into the Learning Server. The user import file must be a standard CSV (comma/quote delimited) text file. The first line of the import file must contain the correct column (field) names from the Learning Server database 'tbl\_user' table. All required columns must be specified. Columns may be specified in any order. See help for details regarding the column specifications.

Click [OnPointUserImport.xls](#) to view or download an Excel spreadsheet with the pre-defined user table column names.

User Import File Name: C:\Users\Robert\Desktop\user\_import2.csv

You may also optionally assign all of the imported users to a selected group and/or course.

Assign to Group: - None -  Make Primary Group

Assign to Course: Mobile Learning Comes of Age

Mobile Registration Code: - None -

Figure 11

3. Select **Import Users**. (Figure 12)

**ADMINISTRATION: USER IMPORT**

This utility is used to import user/learner information into the Learning Server. The user import file must be a standard CSV (comma/quote delimited) text file. The first line of the import file must contain the correct column (field) names from the Learning Server database 'tbl\_user' table. All required columns must be specified. Columns may be specified in any order. See help for details regarding the column specifications.

Click [OnPointUserImport.xls](#) to view or download an Excel spreadsheet with the pre-defined user table column names.

User Import File Name: C:\Users\Robert\Desktop\user\_import2.csv

You may also optionally assign all of the imported users to a selected group and/or course.

Assign to Group: - None -  Make Primary Group

Assign to Course: Mobile Learning Comes of Age

Mobile Registration Code: - None -

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)

This utility is used to import user/learner information into the Learning Server. The user import file must be a standard CSV (comma/quote delimited) text file. The first line of the import file must contain the correct column (field) names from the Learning Server database 'tbl\_user' table. All required columns must be specified. Columns may be specified in any order. See help for details regarding the column specifications.

Click OnPointUserImport.xls to view or download an Excel spreadsheet with the pre-defined user table column names.

User Import File Name: C:\Users\Robert\Desktop\user\_import2.csv

You may also optionally assign all of the imported users to a selected group and/or course.

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)

This utility is used to import user/learner information into the Learning Server. The user import file must be a standard CSV (comma/quote delimited) text file. The first line of the import file must contain the correct column (field) names from the Learning Server database 'tbl\_user' table. All required columns must be specified. Columns may be specified in any order. See help for details regarding the column specifications.

Click OnPointUserImport.xls to view or download an Excel spreadsheet with the pre-defined user table column names.

User Import File Name: C:\Users\Robert\Desktop\user\_import2.csv

You may also optionally assign all of the imported users to a selected group and/or course.

Assign to Group: None  Make Primary Group

Assign to Course: None

Mobile Registration Code:

User will be forced to change their password (This option will reset the user's current password in their user account).

Send After: 08-May-2013      ← Delivery Date  
 Code expires in: 1440 hours      ← Registration Code Expiration  
 Send As:  Email  SMS      ← Communication Delivery

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)

This utility is used to import user/learner information into the Learning Server. The user import file must be a standard CSV (comma/quote delimited) text file. The first line of the import file must contain the correct column (field) names from the Learning Server database 'tbl\_user' table. All required columns must be specified. Columns may be specified in any order. See help for details regarding the column specifications.

Click OnPointUserImport.xls to view or download an Excel spreadsheet with the pre-defined user table column names.

User Import File Name: C:\Users\Robert\Desktop\user\_import2.csv

You may also optionally assign all of the imported users to a selected group and/or course.

Assign to Group: None  Make Primary Group

Assign to Course: None

Mobile Registration Code:

User will be forced to change their password (This option will reset the user's current password in their user account).

Send After: 08-May-2013  
 Code expires in: 1440 hours  
 Send As:  Email  SMS

**Import Users**  Cancel

Figure 14