

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)

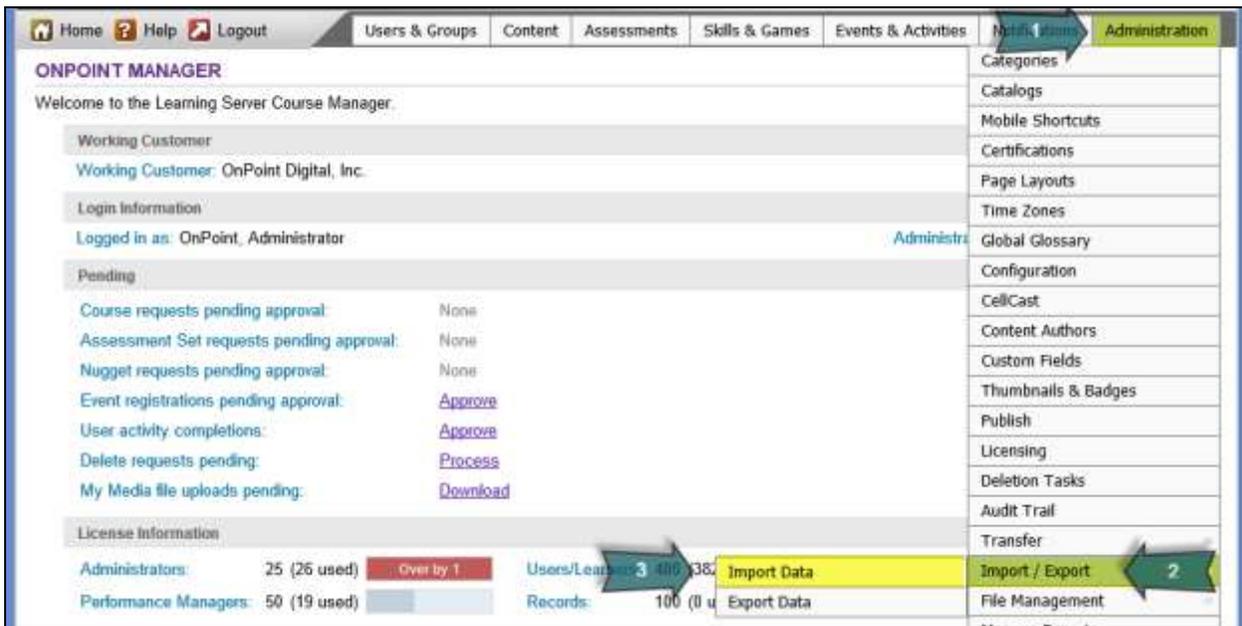


Figure 1

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

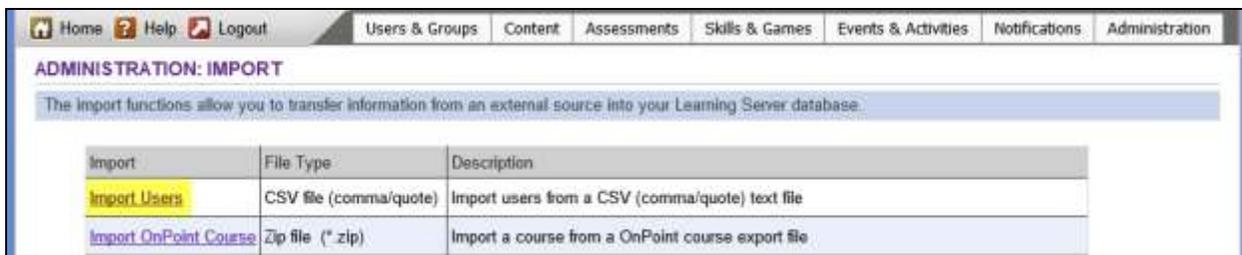


Figure 2

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)

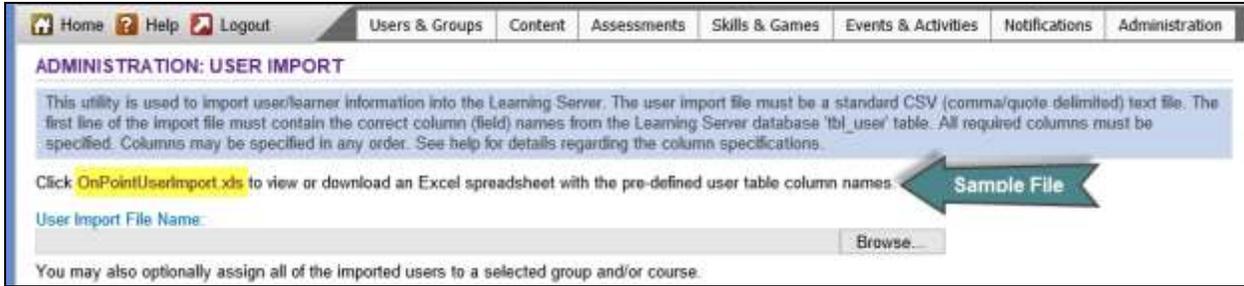


Figure 3

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.



Figure 4

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

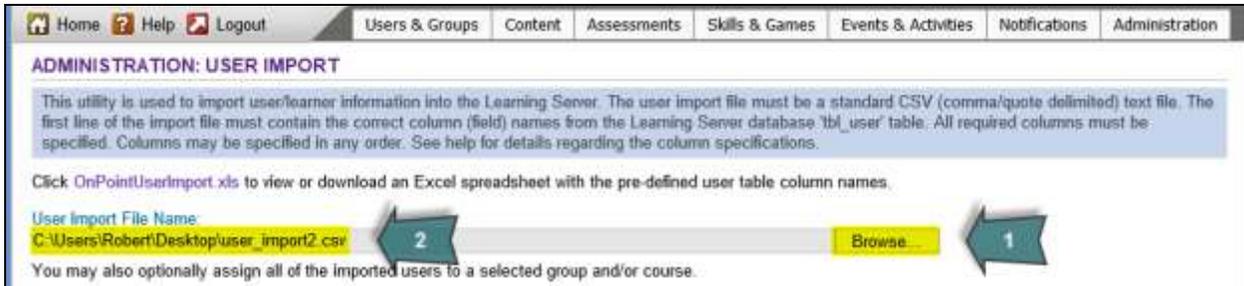


Figure 5

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

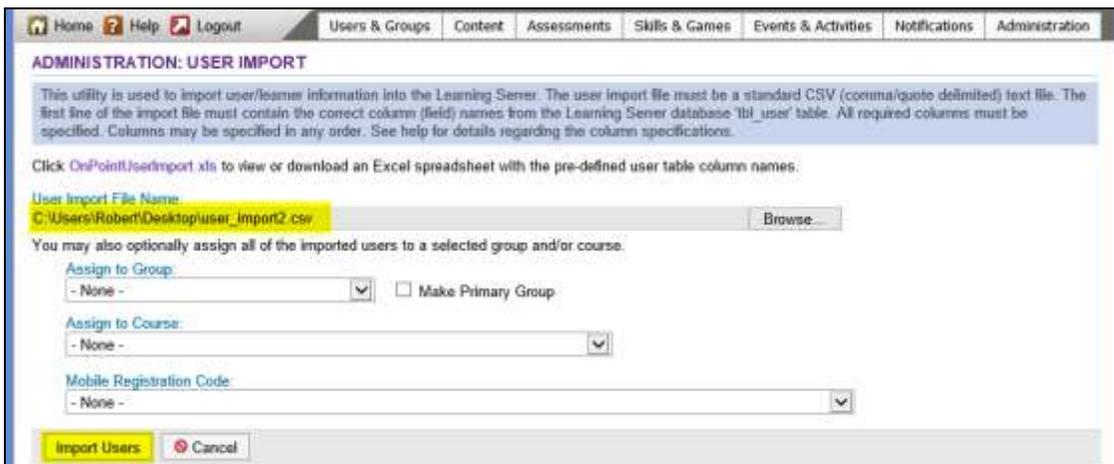


Figure 6

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)

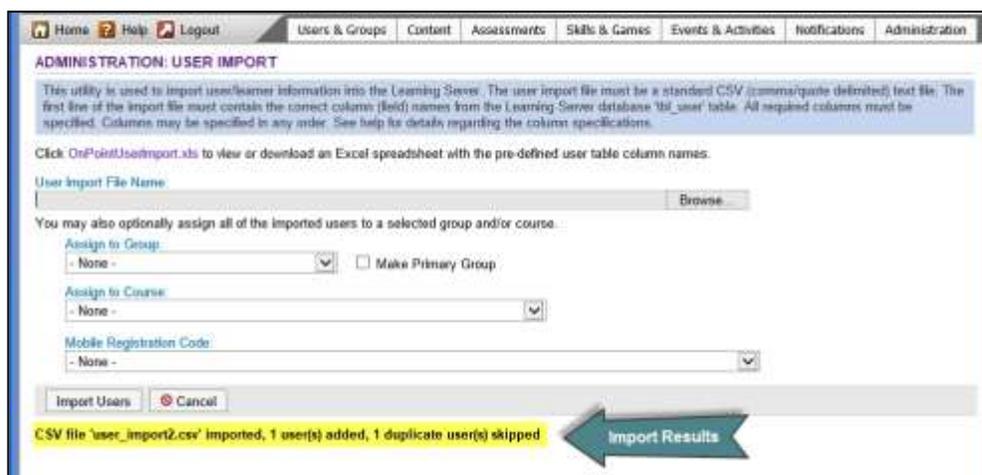


Figure 7

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)

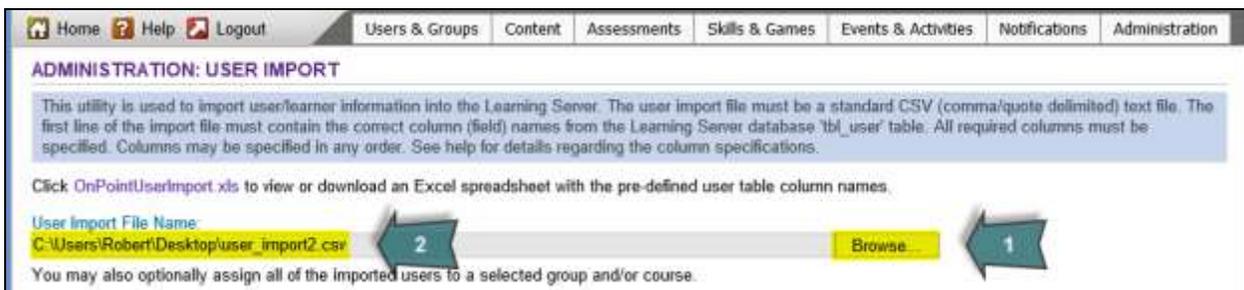


Figure 5

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

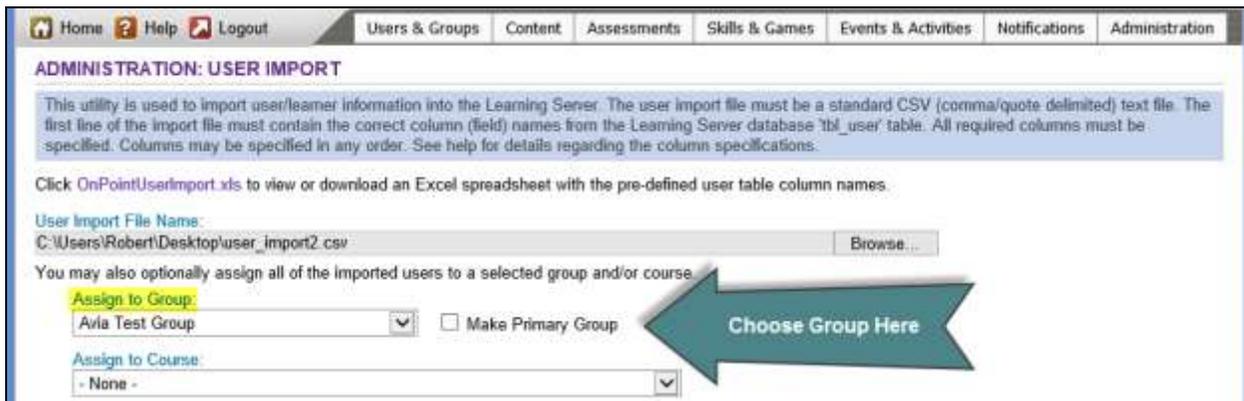


Figure 8

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)

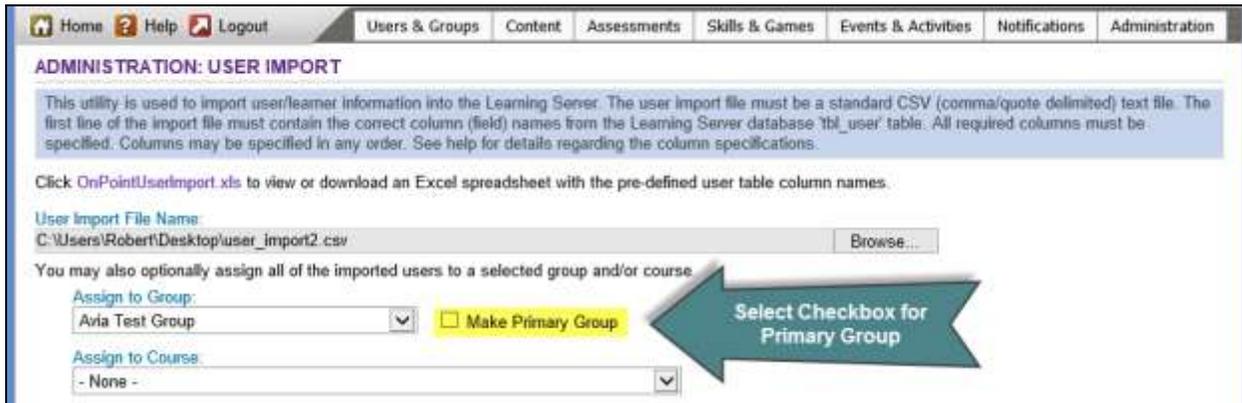


Figure 9

4. Select **Import Users**. (Figure 10)

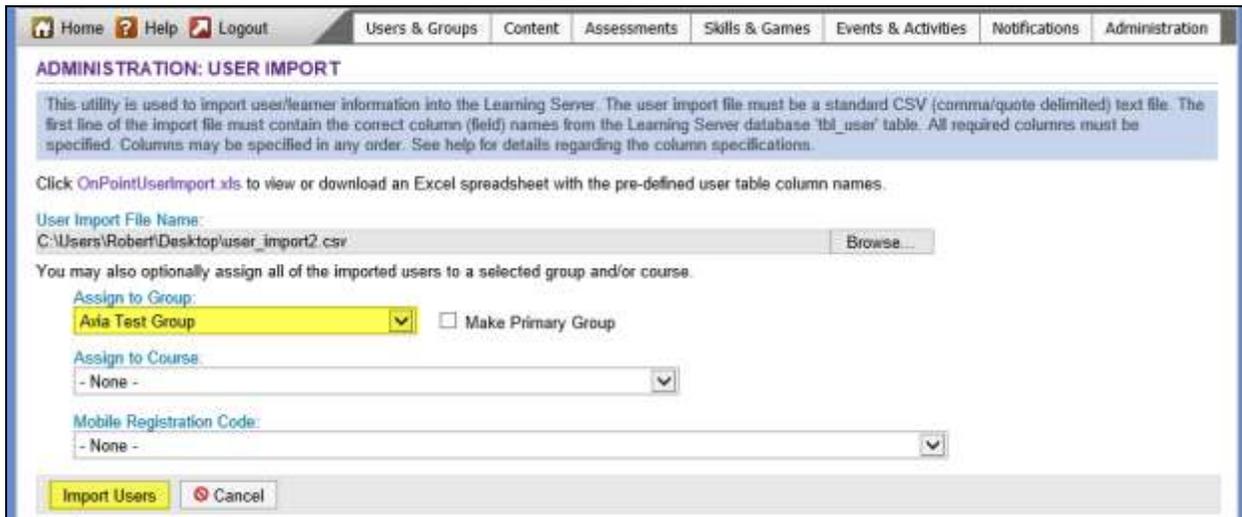


Figure 10

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)

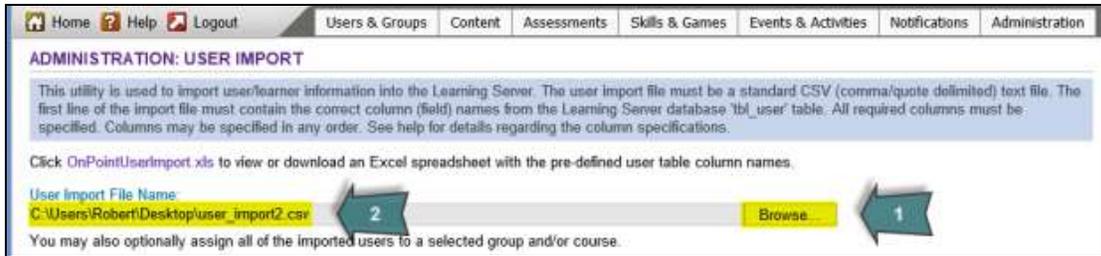


Figure 5

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

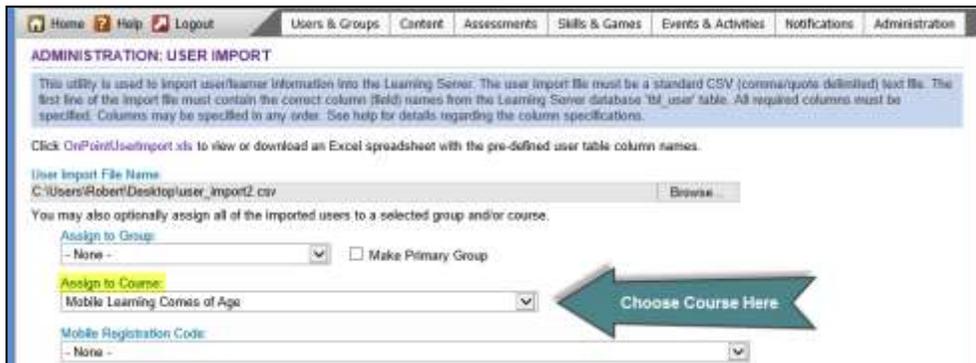


Figure 11

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

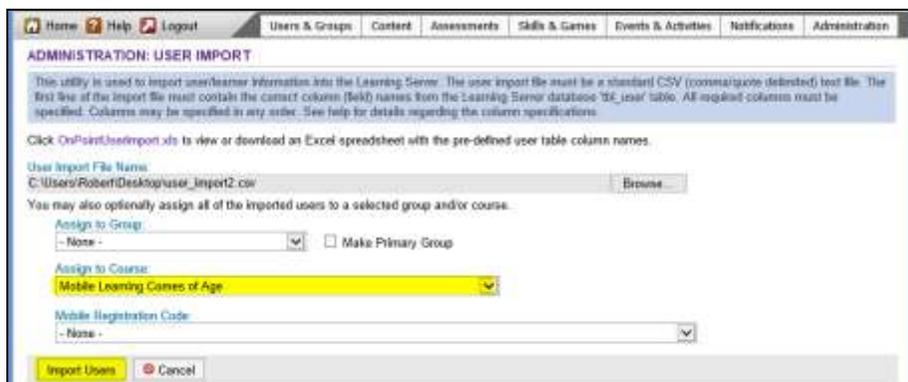


Figure 12

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)

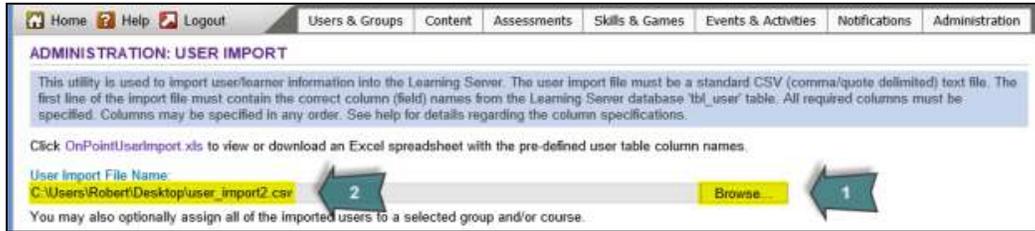


Figure 5

- 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)

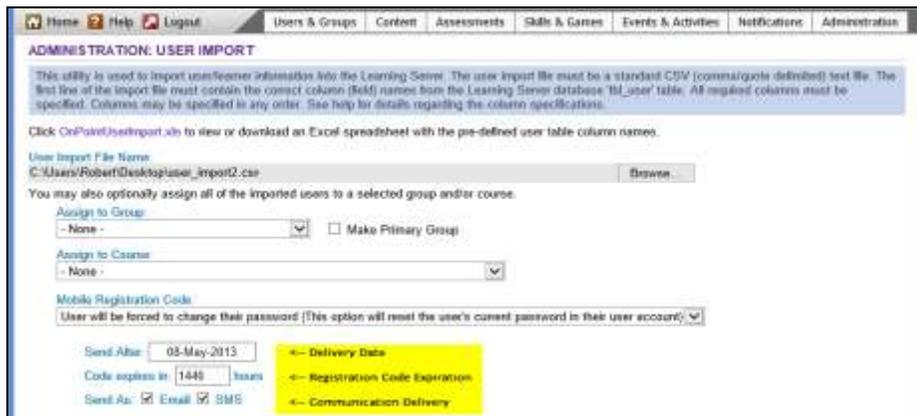


Figure 13

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.

- Select **Import Users**. (Figure 14)

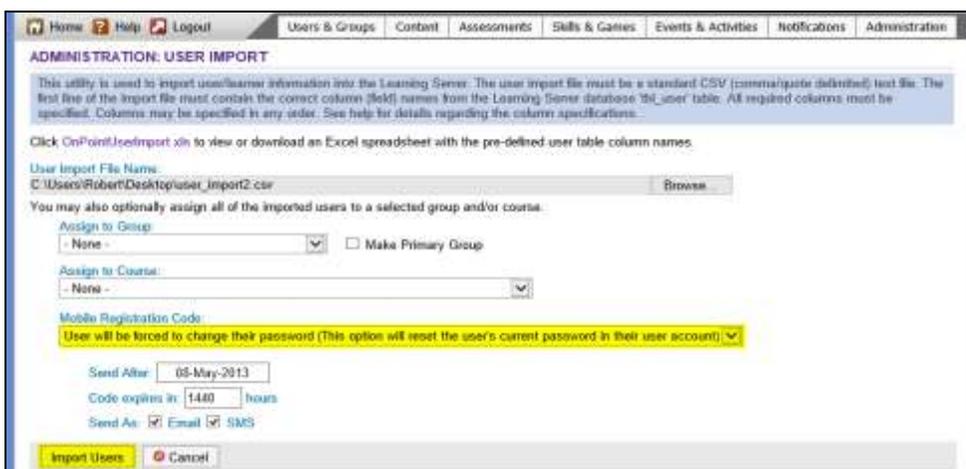


Figure 14