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Interactive User Import/Export 2.0

User Guide

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1 INTRODUCTION

Interactive User Import provides you the functionality to easily and quickly import users into DotNetNuke® and Dynamic Registration through a streamlined and well documented wizard that includes many advanced and dynamic features.

After installing your new user importing module system it is easy to import large files with virtually endless number of users.

Just a few of the many features enable you to optionally distribute emails after the import process, execute interactive events during the process to fire off emails, execute sql statements, add the user to a particular role, and much more.

Interactive User Import also works as a standalone DotNetNuke® User Import with or without other custom registration fields.

Whats New: Enhancements in 2.0:

- Interactive Email Events can now be full HTML within the Rich Text Editor
- New feature to force the user to update their password upon initial login
- New features to default user language and user time zone if these are not originally imported from within the file
- Export features now include the ability to export users security roles, the export routine can generate the expire date for each role selected for export
- Ability to over-ride portal settings for user registration (Public, Private, Verified, None) and automatically authorize the user

Module Features:

- Import users into DotNetNuke® and Dynamic Registration®
- Import Users from Comma Separated File, Tab Separated File, or Semi Colon File
- Import Users from Excel File
- Export users from DotNetNuke® into a CSV file
- Specify which import columns represent your DotNetNuke® User fields
- Specify which import columns represent your Dynamic Registration Custom Fields
- Importing routine is done utilizing the scheduler to allow for large import files and detailed logging
- Save Import definitions, and then later manage and delete import definitions
- Optionally distribute email to user after import
- Optionally generate username and password for user
- Create Interactive Events to fire off during the import routine
- Event to fire off an email during import routine
- Event to execute a SQL statement during import routine
- Event to add user to a role during import routine
- Events can be fired off for every imported user or based on a particular imported field value
- Optionally add the user to single portal or all portals within the DotNetNuke® installation
- Fully localized and ready for any language - all system messages, literals, and labels are all setup within the local resource files (defaults to English)

Note: this manual assumes prior experience with DotNetNuke® application. For further information about DotNetNuke®, please consult the DotNetNuke® manual.

2 INSTALLATION PROCEDURE

Included in your download is a zip file

DataSprings_InteractiveUserImport_UnZipMeBeforeInstall.zip containing two installation zip files.

The procedure for installing these two modules is identical. Therefore only the instructions for installing User Import module will be outlined, but those apply to User Export as well.

In order to install your “Interactive User Import” module, login with an account to your DNN site as a host or administrator account. Once you have logged in, Navigate to the Admin or Host menu item, and click “Module Definition”.

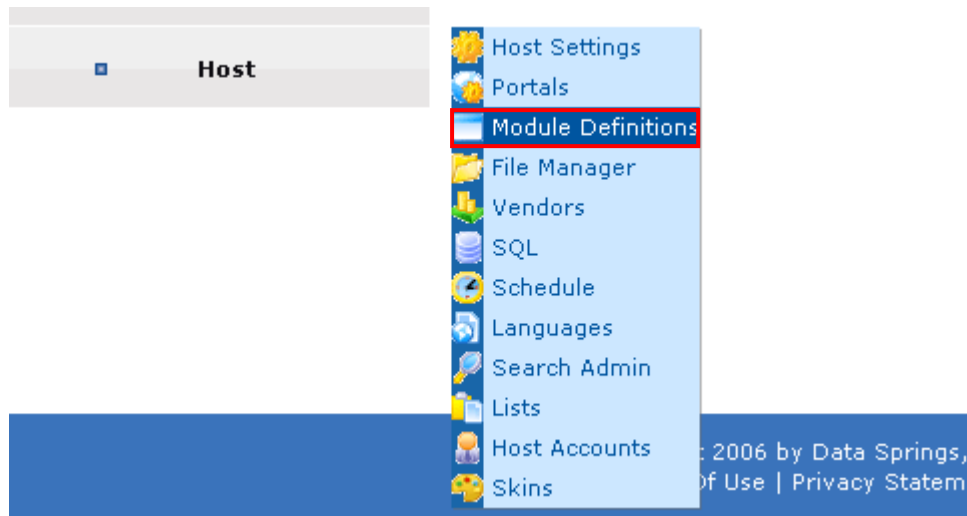


Figure 1: Installation procedure (step 1/6)

The following screen will be displayed.

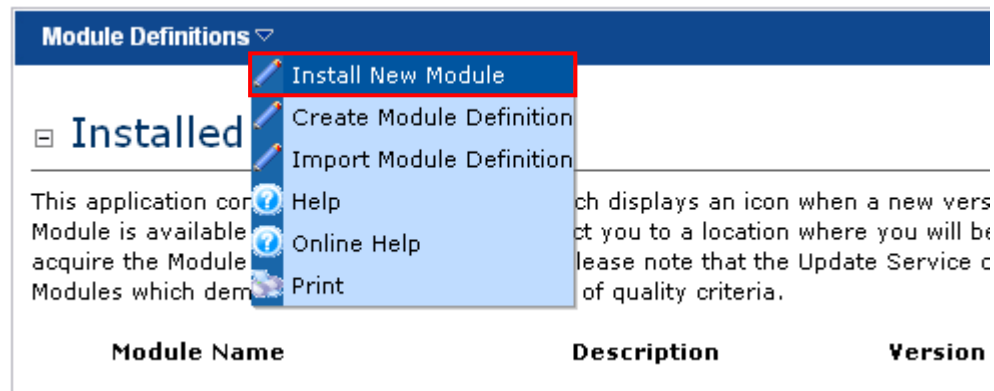


Figure 2: Installation procedure (step 2/6)

Click “Install New Module” to continue installing “Interactive User Import” and the following screen will be displayed.

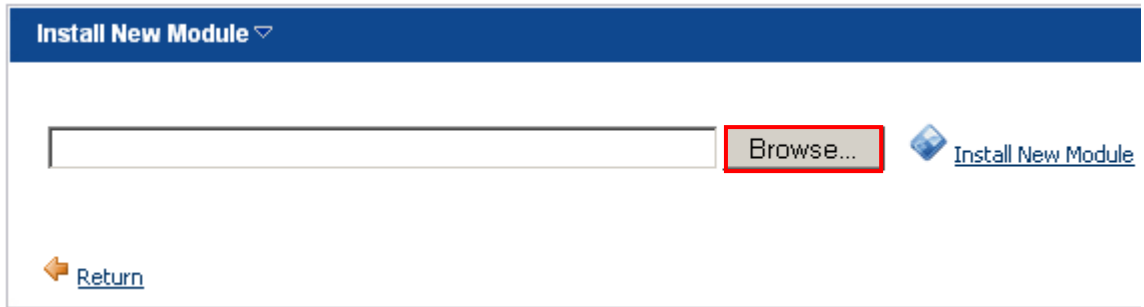


Figure 3: Installation procedure (step 3/6)

Click “Browse” and the dialog window for locating the installation file “**DataSprings_InteractiveUserImport_PA 02.00.10.zip**” will be displayed.

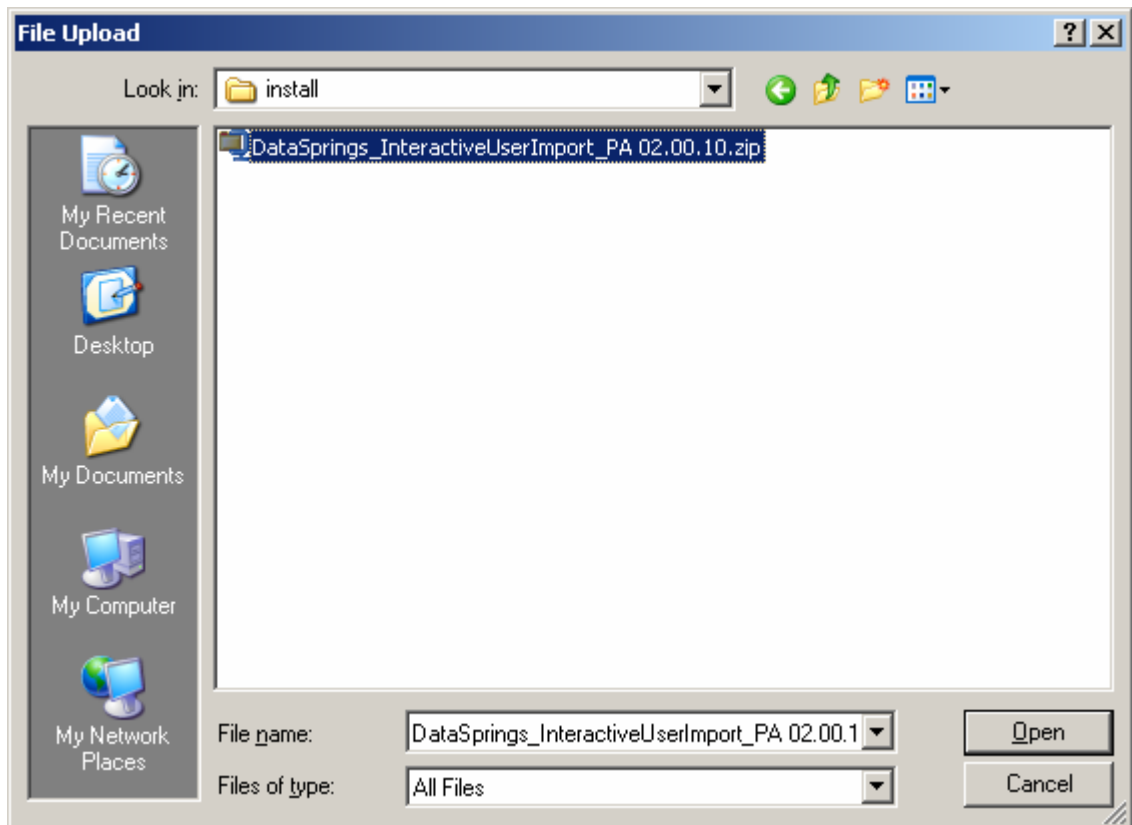


Figure 4: Installation procedure (step 4/6)

Locate the “**DataSprings_InteractiveUserImport_PA 02.00.10.zip**” and click on the “Open” button. The following screen will be displayed.

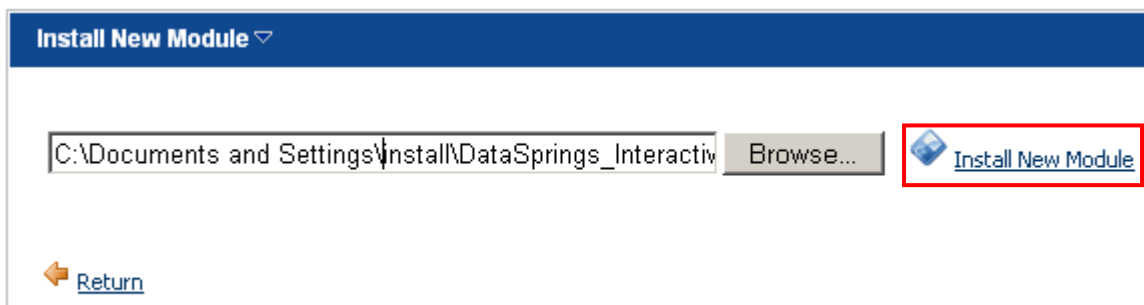


Figure 5: Installation procedure (step 5/6)

Click on the “Install New Module” link inside this screen and the installation will begin. After a couple of moments the screen informing you on successful installation will be displayed.

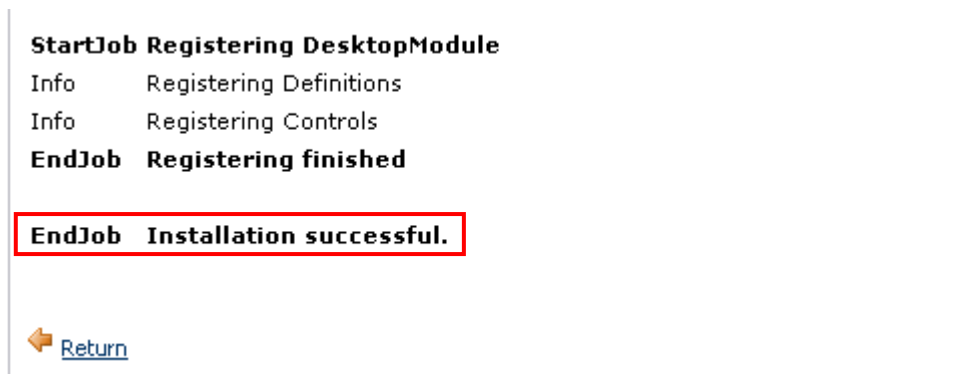



Figure 6: Installation procedure (step 6/6)

Note: please keep track of any errors that appear during the installation. These errors can be helpful if your module has problems.

3 ADDING INTERACTIVE USER IMPORT MODULE TO A PAGE

In order to add “Interactive User Import” module to a desired page follow these steps:

1. Select the “Add New Module” radio button
2. Choose “Interactive User Import” from the “Module” pull down menu
3. Click on the “Add” link (or the arrow icon .

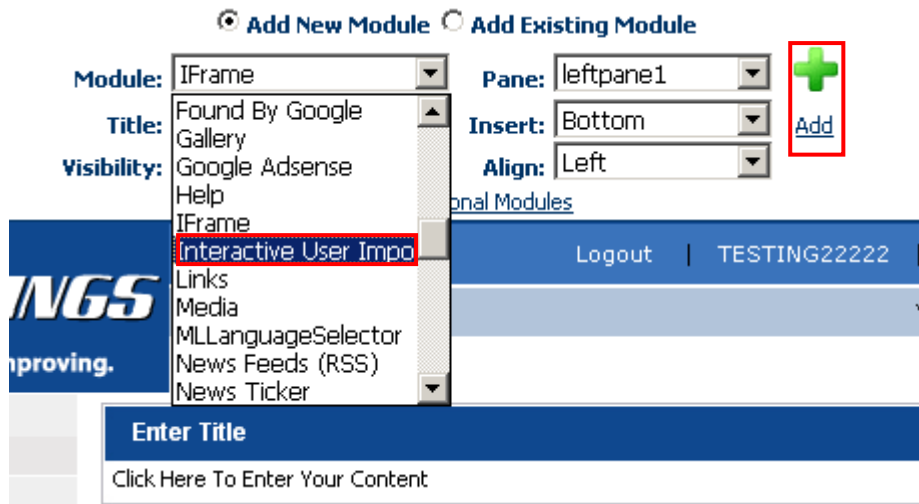


Figure 7: Adding a module to a page

The “Interactive User Import” module will be added to the page.

Interactive User Import ▼

Step 1 - 5

Enter a configuration name and selected a sample import file or import file which represents the column names for this configuration. You can import CSV or TAB delimited text file or Excel (XLS) spreadsheet.

Upload new file
Use existing import configuration

Name:
 I want to execute existing import definition

File:

[Previous](#) | [Next](#) | [Finish](#)

Interactive User Export ▼

Select Fields

<input checked="" type="checkbox"/> Username	<input checked="" type="checkbox"/> Suffix	<input checked="" type="checkbox"/> Cell
<input checked="" type="checkbox"/> Password	<input checked="" type="checkbox"/> Unit	<input checked="" type="checkbox"/> Fax
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Street	<input checked="" type="checkbox"/> Website
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> IM
<input checked="" type="checkbox"/> DisplayName	<input checked="" type="checkbox"/> Region	<input checked="" type="checkbox"/> Biography
<input checked="" type="checkbox"/> e-mail	<input checked="" type="checkbox"/> Country	<input checked="" type="checkbox"/> TimeZone
<input checked="" type="checkbox"/> Prefix	<input checked="" type="checkbox"/> PostalCode	<input checked="" type="checkbox"/> PreferredLocale
<input checked="" type="checkbox"/> MiddleName	<input checked="" type="checkbox"/> Telephone	<input checked="" type="checkbox"/> DNNInstallation

Export Delimiter

Portal Administrator may have disabled this feature.

[Export](#)

Figure 8: Interactive User Import module added to the page

Use the arrow next to the “Interactive User Import” label to open the main menu (see section 4).

4 USING THE INTERACTIVE USER IMPORT MAIN MENU

In order to access the Interactive User Import main menu, click on the arrow symbol next to the “Interactive User Import” label.

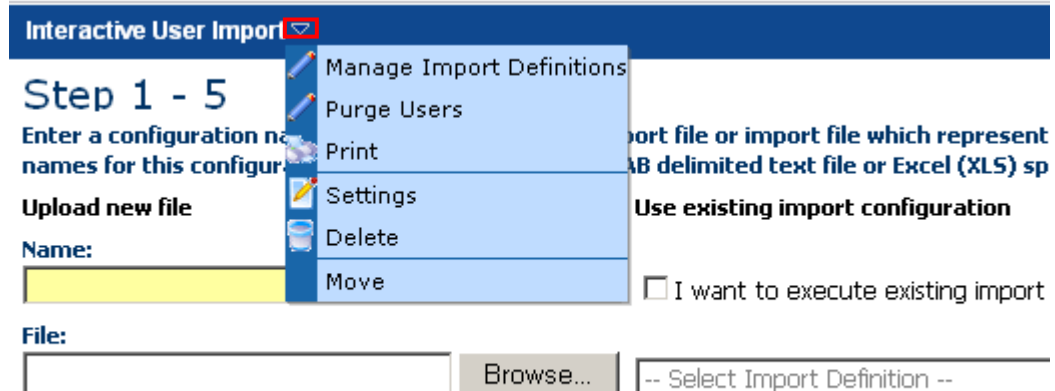


Figure 9: Using the interactive user import main menu

The following options are available inside the main menu:

- **Manage Import Definitions** – option for managing import definitions i.e. import templates (see section 7)
- **Purge Users** – option for deleting users (see section 8)
- **Print** – use this option to display a printer friendly version of the page
- **Settings** – option for managing standard module settings
- **Delete** – option for deleting the module (see section 10)
- **Move** – option for changing the location of the module within the page

5 PERFORMING USER IMPORT

The interactive user import consists of 5 sequential steps. This section of the document will give detailed instructions for each of the steps. The first step is defining the file name and choosing the file which will serve as a template for importing data.

Interactive User Import ▾

Step 1 - 5

Enter a configuration name and selected a sample import file or import file which represents the column names for this configuration. You can import CSV or TAB delimited text file or Excel (XLS) spreadsheet.

Upload new file

Name:

File:

Use existing import configuration

I want to execute existing import definition

[Previous](#) | [Next](#) | [Finish](#)

Figure 10: Importing a file (step 1/5)

The following parameters are available inside the first screen:

- **Upload New File**
 - **Name** – input field for setting the name of import configuration
 - **File** – click on the “Browse” button in order to select the sample import file (**note:** you can import CSV or TAB delimited text file or Excel spreadsheet)
- **I want to execute existing import definition** – see section 6 for further information

After setting the desired parameters, click on the "Next" button. The following screen will be displayed.

Interactive User Import ▾

Step 2 - 5

Select which columns you want to import and specify integration with DotNetNuke core fields such as First Name, Last Name, e-mail...etc.

Upload New File

Select Delimiter: CSV ▾, , [Reload](#)

	Column Name	DotNetNuke Core Field
<input type="checkbox"/>	Username	< Select Field > ▾
<input type="checkbox"/>	Password	< Select Field > ▾
<input type="checkbox"/>	First Name	< Select Field > ▾
<input type="checkbox"/>	Last Name	< Select Field > ▾
<input type="checkbox"/>	DisplayName	< Select Field > ▾
<input type="checkbox"/>	e-mail	< Select Field > ▾
<input type="checkbox"/>	Street	< Select Field > ▾
<input type="checkbox"/>	City	< Select Field > ▾
<input type="checkbox"/>	Country	< Select Field > ▾
<input type="checkbox"/>	IM	< Select Field > ▾

[Previous](#) | [Next](#) | [Finish](#)

Figure 11: Importing a file (step 2/5)

The following parameters are available inside this screen:

- **Select Delimiter** – the CSV format is available (**C**omma **S**eparated **V**alue)
- **Reload** – use this field and link to reload i.e. reapply the delimiter in case the correct one has not been used i.e. the layout of the imported data is not correct
 - **For example:** the # delimiter has been applied to the import file, but the delimiter used in the file is comma; if that is the case the layout will be incorrect; you need to enter comma into the input field and click on the “Reload” link; the new delimiter will be applied and the data will be correctly displayed
- **Column Name / DotNetNuke® Core Field** – select which imported field column should be imported into the DotNetNuke® Core Field (**for example**, if you are importing a file with five columns (First name, last name, telephone, username, password) you would match those columns up with the DotNetNuke® core fields that relate to them.

After choosing the fields you wish to import, click on the "Next" button. The following screen will be displayed.

Notes:

- This is step 2/5. Within this step you will specify which imported fields will be imported and matched with the DotNetNuke® core fields. If you only see one row or one column listed you should review the delimiter. The default delimiter is a semi-colon but might need to be changed based upon the delimiter used in imported file

Interactive User Import ▾

Step 3 - 5

Easily setup events for your interactive user import. Based upon field values you can add/remove the user from a DNN Role, send users e-mail, or execute sql query. Fields being imported, should fire off the event.

DNN Role
 Distribute e-mail
 Execute SQL Query

Role Settings:
 ▾
 Expire Date:
 [Calendar](#)

When:
 ▾
 and
 ▾
 =
 [Add Event](#)

Dynamic Events in this import definition:

Event	Properties	When
-------	------------	------

[Previous](#) | [Next](#) | [Finish](#)

Figure 12: Importing a file (step 3/5)

The following parameters are available inside this screen

- **DNN Role** – this option will add a user to a role, if you select only on initial import it will not add the user to the role for updating the user etc.... Also, you can make this condition based upon criteria in the 'Select Field'. For example if the field State is = "California" then add them to this role, otherwise it would not.
- **Distribute e-mail** – see section 5.3 - similar to above example but instead it distributes and email
- **Execute SQL Query** – see section 5.4 - Similar to above example but instead it executes a SQL statement
- **Dynamic Events in this import definition** – this part of the screen will list the defined events so you could review the settings prior to moving on to the 4th step

After setting the desired parameters, click on the "Next" button. The following screen will be displayed.

Interactive User Import ▾

Step 4 - 5

You can setup additional option for this job. Generate random password will overwrite imported password field if any. Superuser accounts can perform import on all Portals in the database. Please be careful with Overwrite Existing option since this will instruct scheduler to overwrite existing User Properties based on the Username.

- Generate User Name
- Generate Password?
- Overwrite Existing Users (by username)?
- Register on all Portals in the database (Must be Super User to enable)?
- Enable logging (recommend for small distributions)?
- Make import recurring (will run import for every scheduled instance)?
- Use static file for import (will run import pulling file from the server for each import)?
- Specify global filter?
- Limit Records Per Scheduler Instance?
- Force password change upon next sign in?
- Automatically Authorize Users (override user registration flag for public/private/verified in Admin/Site Settings)

Previous | [Next](#) | [Finish](#)

Figure 13: Importing a file (step 4/5)

Within this screen you can setup additional options for this job such as generate username or passwords for the users. The following parameters are available inside this screen:

- **Generate User Name** – select this option if you would like “Interactive User Import” module to automatically generate the username
 - **Auto Create User type** – list of the different auto create user type options
- **Generate Password** - select if you would like Interactive User Import to automatically generate the password for users
 - **Password Prefix** – if “Interactive User Import” module is generating the password, you should specify the prefix for the password here; the prefix will be the beginning characters used for the password (**e.g:** yourportal)
 - **Password Suffix number length** – if “Interactive User Import” module is generating the password, you should specify a suffix length here; a password suffix would be a random number; the random number length would be based upon this settings
 - **For example:** if you selected 4 it is possible the password (based upon the password prefix) could be “yourportal_1392” or “yourportal_9332”. If you selected 6 as your suffix number length then your password might be “yourportal_732814”, etc
- **Overwrite Existing Users (by username)** – if you are importing user information this option can overwrite current information based on the userID.
 - **For example** if the user’s last name, their phone number, or their email address has changed, then the import process would update their DotNetNuke® and Dynamic Registration® user information; if this option is not checked the user will be skipped and user information will not be overwritten

- **Register on all Portals in the database (Must be Super User to enable)?** – select this option if you would like the user and user information registered on each portal within the host installation
- **Enable logging (recommended for small distributions)** - select this option if you wish to allow logging of the import processes. This log is then viewed under Host, Scheduler, and then the History link for the specific application
- **Make import recurring (will run import for every scheduled instance)?** – select this option if you wish to make the import a recurring procedure. This import will always execute based on when the scheduler is enabled to run. The scheduler settings are setup under Host, Scheduler. If you edit the scheduled definition for the Data Springs User Import process you could specify the schedule settings (such as nightly at 11:00PM etc...)
- **Use static file for import (will run import pulling file from the server for each import)?** – select this option if you wish to use the same file for every import; when you select this checkbox the page will be refreshed containing the input field for specifying the desired import file/template
- **Specify global filter?**- this feature will review a global filter before importing the user
 - **For example:** You might want to only import users if the Postal Code was set to a specific postal code. This feature is useful if you want to use one large distribution file but maybe only import specific records for this specific portal or import definition
- **Limit Records Per Scheduler Instance?** - select this option if you wish to set a limit to how many records can be imported per scheduled import; when you select this checkbox the page will be refreshed containing the input field for specifying the desired amount of records to be imported per scheduled import
- **Force password change upon next sign in?** - select this option if you wish to make the users change their password the next time they sign in
- **Automatically Authorize Users (override user registration flag for public/private/verified in Admin/Site Settings)** – use this option to automatically authorize imported users disregarding the potential registration flag in the Admin/Site Settings

After setting the desired parameters, click on the "Next" link. The following screen will be displayed.

Interactive User Import ▾

Step 5 - 5

Press Finish to create import Job. New Scheduler Process will be created. Please visit DotNet more information about this job.

Preview Data

Username	Password	First name	Last name	Display name	Email
		John	Smith		jsmith@address.com
		Samantha	Smith		ssmith@address.com
		Rob	Smith		rsmith@address.com
		Ted	Smith		tsmith@address.com
		Jane	Smith		janesmith@address.com

Core Integration

Dynamic Events

Import Options

[Previous](#) | [Next](#) | [Finish](#)

Figure 14: Importing a file (step 5/5)

Preview the data as well as chosen options by using the + symbol next to each of the three labels (Core Integration, Dynamic Events and Import options) and click on the “Finish” to complete the procedure. The following screen will be displayed.

Interactive User Import ▾

Message

The import job has been created. Please visit Host Settings - Schedule for a more details.
[Click Here](#) to go back.

Interactive User Export ▾

Select Fields

<input type="checkbox"/> Username	<input type="checkbox"/> MiddleName	<input type="checkbox"/> Active
<input type="checkbox"/> Password	<input type="checkbox"/> Suffix	<input type="checkbox"/> Publish
<input type="checkbox"/> First Name	<input type="checkbox"/> Unit	<input type="checkbox"/> Schulform
<input type="checkbox"/> Last Name	<input type="checkbox"/> Street	<input type="checkbox"/> 1.FachHG
<input type="checkbox"/> DisplayName	<input type="checkbox"/> City	<input type="checkbox"/> 2.FachHG
<input type="checkbox"/> e-mail	<input type="checkbox"/> Region	<input type="checkbox"/> 1.FachGR

Figure 15: Import successfully performed

Note: click on the link to view detailed import history (see section 5.1).

5.1 Viewing Import History

In order to view the history of import jobs, choose option “Schedule” from the “Host” menu.

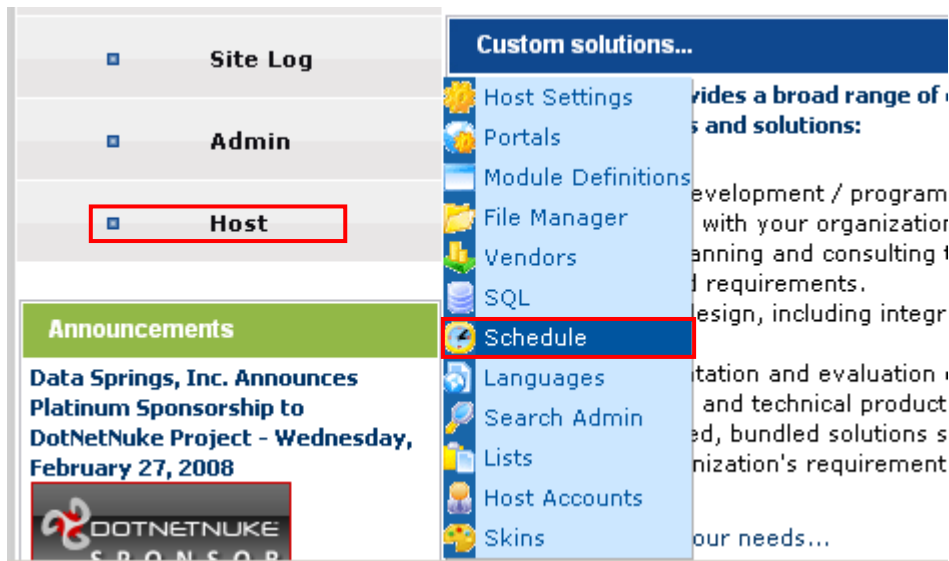


Figure 16: Viewing Import History (step 1/3)

The following screen will be displayed.

Type	Enabled	Frequency	Retry Time Lapse	Next Start	
DotNetNuke.Services.FileSystem.SynchronizeFileSystem, DOTNETNUKE		Every 1 Hour	Every 2 Hours		History
DotNetNuke.Services.Cache.PurgeCache, DOTNETNUKE		Every 2 Hours	Every 30 Minutes		History
Dataspring.DNN.Modules.OptInAdvanceEmail.SendNewsletters,Dataspring.DNN.Modules.OptInAdvanceEmail	<input checked="" type="checkbox"/>	Every 1 Hour	Every 4 Hours	3/25/2008 7:40:49 AM	History
DataSprings.DNN.Modules.UserImport.UserImportProcess, DataSprings.DNN.Modules.UserImport	<input checked="" type="checkbox"/>	Every 45 Minutes	Every 60 Minutes	3/25/2008 7:54:17 AM	History

Figure 17: Viewing Import History (step 2/3)

Click on the “History” link next to the import schedule and the following screen will be displayed.

Schedule History			
Description	Duration (seconds)	Succeeded	Start/End/Next Start
<p><i>DataSprings.DNN.Modules.UserImport.UserImportProcess, DataSprings.DNN.Modules.UserImport</i></p> <p>Interactive User Import Log: importing:'5tE'; build:'2.0.0.26141'; logging enabled'; limited records per instance feature is turned off; CSV File:'d:\websites\betasprings\Portals\0\02659a726c6436c85b80de274f3778b.csv'; Static File:'; CSV Delimiter:',''; Successfully Loaded File w/ Row Count:'12';</p> <p>-----New Imported User-----</p> <p>Records:1 Display Name:10 Auto Create Type:3 PortalID:0 Created User: otte@gmx.com - Beta Springs User Status (failed) :otte@gmx.com failed w/ status: InvalidPassword; Skipping to next record;</p> <p>-----New Imported User-----</p> <p>Records:2 Display Name:10 Auto Create Type:3 PortalID:0 Created User: guenter.eberspach@eberspaecher.com - Beta Springs User Status (failed) :guenter.eberspach@eberspaecher.com failed w/ status: InvalidPassword; Skipping to next record;</p> <p>-----New Imported User-----</p> <p>Records:3 Display Name:10 Auto Create Type:3 PortalID:0</p>	10.39	True	S: 8/28/2009 1:52:02 AM E: 8/28/2009 1:52:12 AM N: 8/28/2009 2:52:02 AM

Figure 18: Viewing Import History (step 3/3)

5.2 Setting up interactive events

This section will explain how to setup various interactive events.

Interactive User Import ▾

Step 3 - 5

Easily setup events for your interactive user import. Based upon field values you can add/remove the user from a DNN Role, send users e-mail, or execute sql query. Fields being imported, should fire off the event.

DNN Role
 Distribute e-mail
 Execute SQL Query

Role Settings: Administrators ▾
 Expire Date: [Calendar](#)

When: Only Initial Import ▾ and < Any Field Response > ▾ = [Add Event](#)

Dynamic Events in this import definition:

Event	Properties	When

[Previous](#) | [Next](#) | [Finish](#)

Figure 19: Setting up interactive events

The following parameters are available inside this screen

- **DNN Role** – this option will add a user to a role, if you select only on initial import it will not add the user to the role for updating the user etc.... Also, you can make this condition based upon criteria in the 'Select Field'. For example if the field State is = "California" then add them to this role, otherwise it would not.
- **Distribute e-mail** – see section 5.3 - - Similar to above example but instead it distributes and email
- **Execute SQL Query** – see section 5.4 - Similar to above example but instead it executes a SQL statement

After setting the desired parameters, click on the "Next" button.

5.3 Distributing e-mails

In order to distribute e-mail during the interactive user import, choose option “Distribute e-mail”. The page will be refreshed with further options for defining an email message.

Interactive User Import ▾

Step 3 - 5

Easily setup events for your interactive user import. Based upon field values you can add/remove the from a DNN Role, send users e-mail, or execute sql query. Fields being imported, should fire off the eve

DNN Role
 Distribute e-mail
 Execute SQL Query

E-mail Settings:

From Name

From Email

TO

Subject

Message
 Basic Text Box
 Rich Text Editor

Dear \$(FirstName),

Text
 Html
 Raw

When: and = [Add Event](#)

Dynamic Events in this import definition:

Event | **Properties** | **When**

[Previous](#) | [Next](#) | [Finish](#)

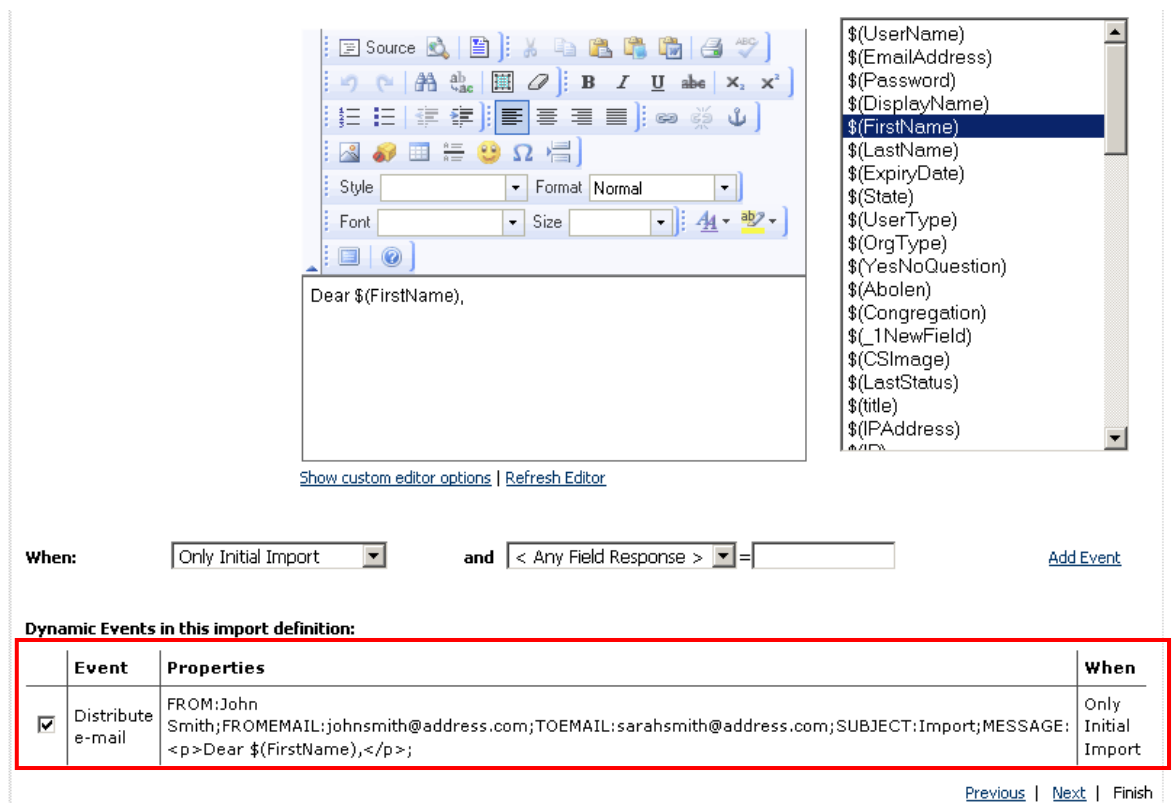
Figure 20: Distributing email

The following parameters are available inside this screen:

- **E-mail Settings**
 - **From Name** – enter the name of the person you want the email message to appear to be from.

- **From Email** - enter the email of the person you want the email message to appear to be from
- **TO** – input field for entering the email address of the recipient. **Note: You can use tokens within the email to property. For example \$(EmailAddress). This will get replaced with the users email during the import.**
- **Subject** – input field for entering the subject of the email message. **Note: You can use tokens within the email subject. For example, \$(FirstName) – You are not registered in the portal!**
- **Message** – text area for defining the body of the email message
 - **Note:** you can choose from the following message formats by clicking the appropriate radio button next to the label:
 - Text
 - HTML
 - Raw
- **Basic Text Box** – this is the default setting for a plain text message
- **Rich Text Editor** – click this to enable the WYSIWYG editor for rich text formatting (see Figure 22)
- **When/and** – pull down menu for selecting the desired timing for sending this message (e.g. “Only Initial Import”)
- **Add Event** – option for adding an event

After setting the desired parameters, click “Add Event” to add the defined event and the page will be refreshed containing details of the created event.



\$(UserName)
\$(EmailAddress)
\$(Password)
\$(DisplayName)
\$(FirstName)
\$(LastName)
\$(ExpiryDate)
\$(State)
\$(UserType)
\$(OrgType)
\$(YesNoQuestion)
\$(Abolen)
\$(Congregation)
\$(_1NewField)
\$(CSImage)
\$(LastStatus)
\$(title)
\$(IPAddress)

Dear \$(FirstName),

[Show custom editor options](#) | [Refresh Editor](#)

When: and = [Add Event](#)

Dynamic Events in this import definition:

	Event	Properties	When
<input checked="" type="checkbox"/>	Distribute e-mail	FROM:John Smith;FROMEMAIL:johnsmith@address.com;TOEMAIL:sarahsmith@address.com;SUBJECT:Import;MESSAGE:<p>Dear \$(FirstName),</p>;	Only Initial Import

[Previous](#) | [Next](#) | [Finish](#)

Figure 21: Event successfully created

Click "Next" button to continue defining this import.

5.4 Executing a SQL Query

In order to execute a SQL query during the interactive user import, choose option "Execute SQL Query". The page will be refreshed with further options for defining a query.

Interactive User Import ▾

Step 3 - 5

Easily setup events for your interactive user import. Based upon field values you can add/remove e-mail, or execute sql query. Fields being imported, should fire off the event.

DNN Role
 Distribute e-mail
 Execute SQL Query

SQL Settings:

SQL

- \$(UserName)
- \$(EmailAddress)
- \$(Password)
- \$(DisplayName)
- \$(FirstName)
- \$(LastName)
- \$(ExpiryDate)
- \$(State)
- \$(UserType)
- \$(OrgType)
- \$(YesNoQuestion)
- \$(Abolen)

When: ▾ **and** ▾ =

Figure 23: Executing SQL query

The following parameters are available inside this screen:

- **SQL Settings**
 - **SQL** – text area for entering the desired query
 - **Tokens** – list of tokens you can choose from to further automate the query
- **When/and** – pull down menu for selecting the desired timing for executing this query (**e.g.** "Only Initial Import")
- **Add Event** – option for adding an event

After setting the desired parameters, click on the "Next" link in order to continue the import.

6 USING EXISTING IMPORT DEFINITION

Apart from uploading a new import configuration file, you have the option of using an existing import definition in case you have already performed imports.

In order to use an existing import configuration, select that checkbox (“I want to execute existing import definition”), choose the desired import definition from the pull down menu and click on the “Next” link.

Figure 24: Using an existing import definition (step 1/3)

The following screen will be displayed.

	Column Name	DotNetNuke Core Field
<input checked="" type="checkbox"/>	Username	Username
<input checked="" type="checkbox"/>	Password	Password
<input checked="" type="checkbox"/>	First Name	First Name

Figure 25: Using an existing import definition (step 2/3)

This screen contains the import definition as used previously, but also an option “Upload New File” which you can now use to import data using this setup but from a completely new file. The following screen will be displayed after you click on the “Upload New File” link.

Interactive User Import ▾

Step 2 - 5

Select which columns you want to import and specify integration with DotNetNuke core fields such as First Name, Last Name, e-mail...etc.

C:\Documents and Settings\gazib:

Select Delimiter: [Reload](#)

	Column Name	DotNetNuke Core Field
<input checked="" type="checkbox"/>	Username	<input type="text" value="Username"/>
<input checked="" type="checkbox"/>	Password	<input type="text" value="Password"/>

Figure 26: Using an existing import definition (step 3/3)

Click on the "Browse" button to locate the desired file on your PC and then click on the "Upload" link to begin importing the data from the new file.

7 MANAGING IMPORT DEFINITIONS

In order to start managing import definitions, choose option “Manage Import Definitions”.

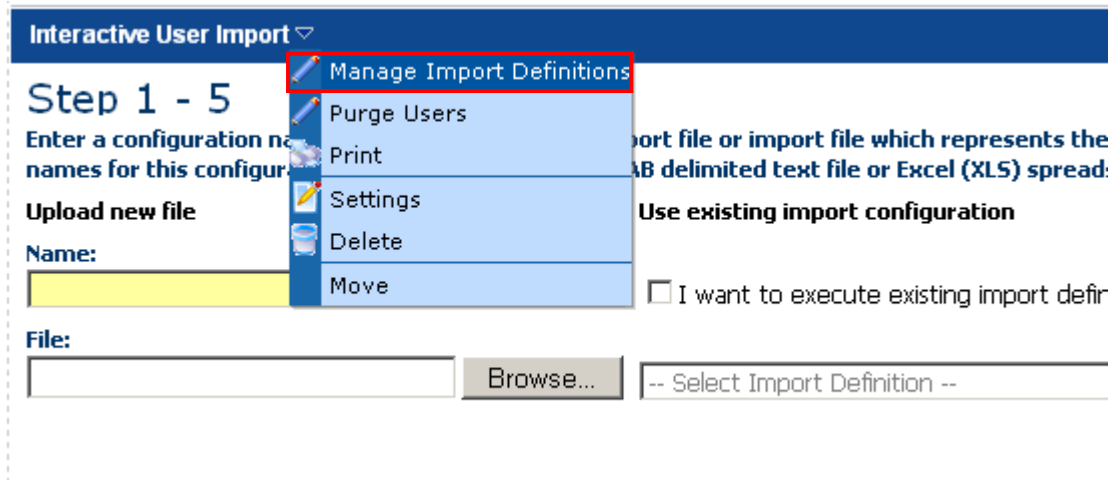


Figure 27: Choosing option “Manage Import Definitions”

The following screen will be displayed.

Manage Import Definitions							
ID	Name	Created By	Created Date	Changed By	Changed Date	Active	
✗ 7	my import	johnsmith	3/25/2008	johnsmith	3/25/2008	False	
✗ 8	my import	johnsmith	3/25/2008	johnsmith	3/25/2008	False	
✗ 9	my import	johnsmith	3/25/2008	johnsmith	3/25/2008	False	
✗ 10	my import	johnsmith	3/25/2008	johnsmith	3/25/2008	True	

[Cancel](#)

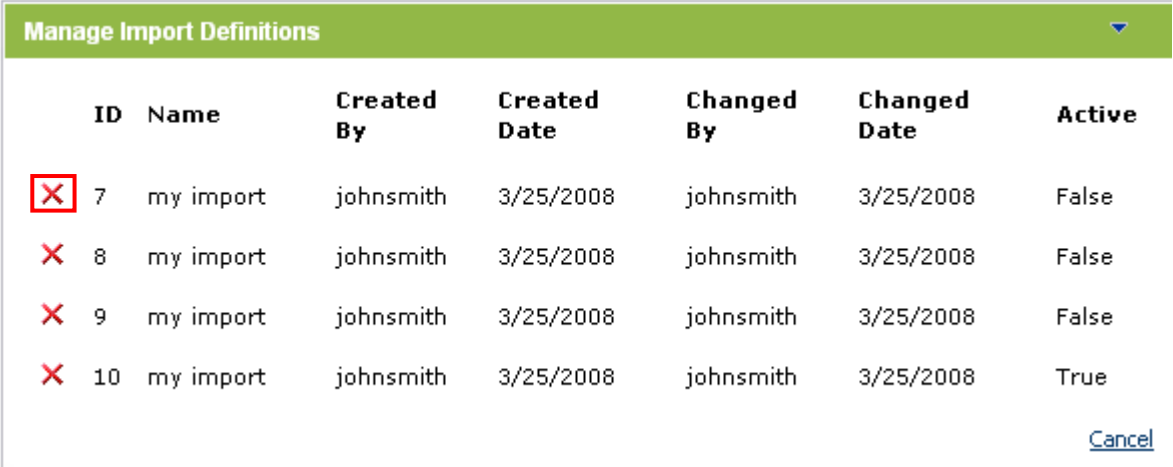
Figure 28: Managing import definitions

The following parameters and options are available inside this screen:

- **✗** - option for deleting an import definition (see section 7.1)
- **ID** – field displaying import definition ID
- **Name** – field displaying the name of the import definition
- **Created By** – field displaying username of the user who created
- **Created Date** – field displaying the date import definition has been created
- **Changed By** - field displaying username of the user who changed the import definition
- **Changed Date** - field displaying the date import definition has been modified
- **Active** – field displaying the import definition status

7.1 Deleting an import definition

In order to delete an import definition click on the delete icon **X** next to the desired import definition.



ID	Name	Created By	Created Date	Changed By	Changed Date	Active
X 7	my import	johnsmith	3/25/2008	johnsmith	3/25/2008	False
X 8	my import	johnsmith	3/25/2008	johnsmith	3/25/2008	False
X 9	my import	johnsmith	3/25/2008	johnsmith	3/25/2008	False
X 10	my import	johnsmith	3/25/2008	johnsmith	3/25/2008	True

[Cancel](#)

Figure 29: Deleting an import definition (step 1/2)

The following screen will be displayed.

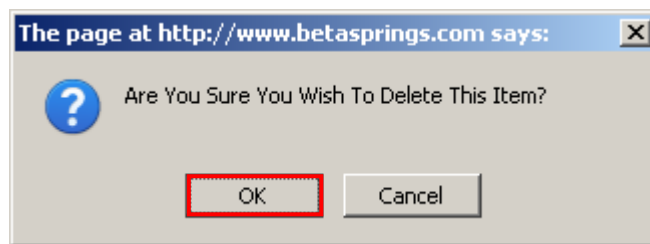


Figure 30: Deleting an import definition (step 2/2)

Click "OK" button and the import definition will be deleted.

8 PURGING USERS

In order to purge/delete all users within your portal instance, choose option “Purge Users” from the main menu.

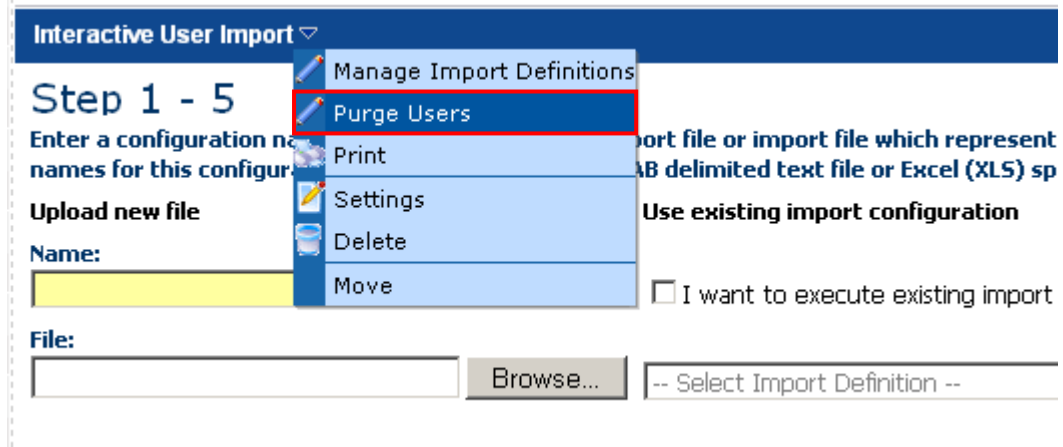


Figure 31: Purging users (step 1/2)

The following screen will be displayed.

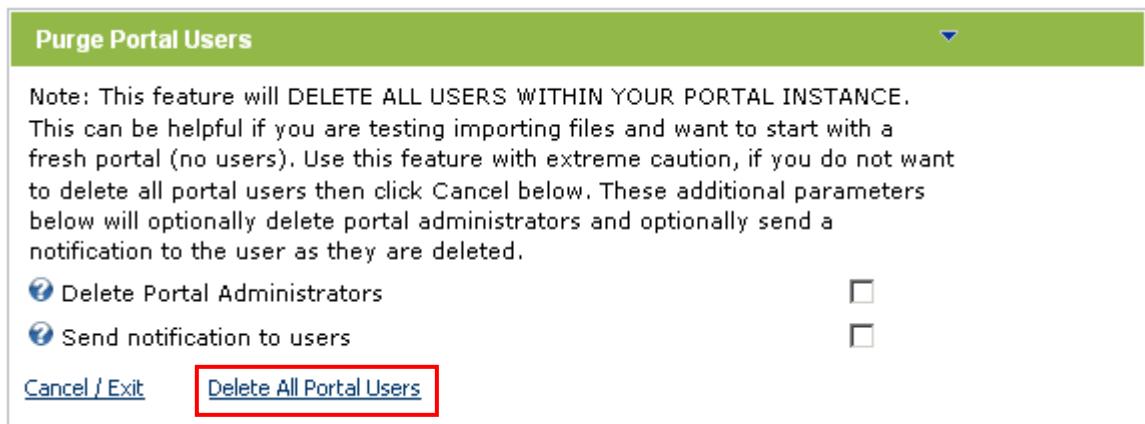


Figure 32: Purging users (step 2/2)

The following other parameters are available inside this screen:

- **Delete Portal Administrators** – select this checkbox to delete portal administrators
- **Send Notification to users** – select this checkbox to send the notification to the users that they have been deleted

After setting the desired parameters, click on the “Delete All Portal Users” and the users will be deleted.

9 PERFORMING USER EXPORT

In order to perform an export of user information, set the desired export parameters and click “Export”.

Interactive User Export ▾

Select Fields

<input type="checkbox"/> Username	<input type="checkbox"/> MiddleName	<input type="checkbox"/> Active
<input type="checkbox"/> Password	<input type="checkbox"/> Suffix	<input type="checkbox"/> Publish
<input type="checkbox"/> First Name	<input type="checkbox"/> Unit	<input type="checkbox"/> Schulform
<input type="checkbox"/> Last Name	<input type="checkbox"/> Street	<input type="checkbox"/> 1.FachHG
<input type="checkbox"/> DisplayName	<input type="checkbox"/> City	<input type="checkbox"/> 2.FachHG
<input type="checkbox"/> e-mail	<input type="checkbox"/> Region	<input type="checkbox"/> 1.FachGR
<input type="checkbox"/> State	<input type="checkbox"/> Country	<input type="checkbox"/> 3.Fach
<input type="checkbox"/> UserType	<input type="checkbox"/> Gender	<input type="checkbox"/> Zusammen-ja-nein
<input type="checkbox"/> OrgType	<input type="checkbox"/> PostalCode	<input type="checkbox"/> Zusammenarbeit-Name

Select Roles

<input type="checkbox"/> admin	<input type="checkbox"/> Gold	<input type="checkbox"/> SBT-Redirection Role2
<input type="checkbox"/> Administrators	<input type="checkbox"/> IAM	<input type="checkbox"/> Silver
<input type="checkbox"/> Arbitrary Role 1	<input type="checkbox"/> Individual	<input type="checkbox"/> Subscribers
<input type="checkbox"/> board memebers	<input type="checkbox"/> Jason-Test-Member	<input type="checkbox"/> Test Special Admin

Export Delimiter

#

Portal Administrator may have disabled this feature.

Export

Figure 33: Exporting user information (step 1/4)

The following export parameters are available:

- **Select Fields** – set the fields you wish to export
- **Select Roles** – set the desired roles you wish to export. Selecting each role will display the users expiry date within the export file.
- **Export Delimiter** – use this field to specify the export delimiter i.e. the symbol which will divide the data

Once you set the export parameters, click “Export” and the following screen will be displayed.

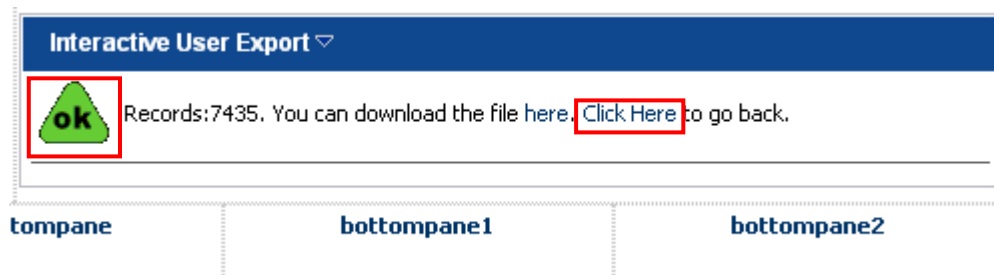


Figure 34: Exporting user information (step 2/4)

The "OK" icon displayed in the left hand corner denotes the successful export. Click on the "here" link to download the file. The following screen will be displayed.

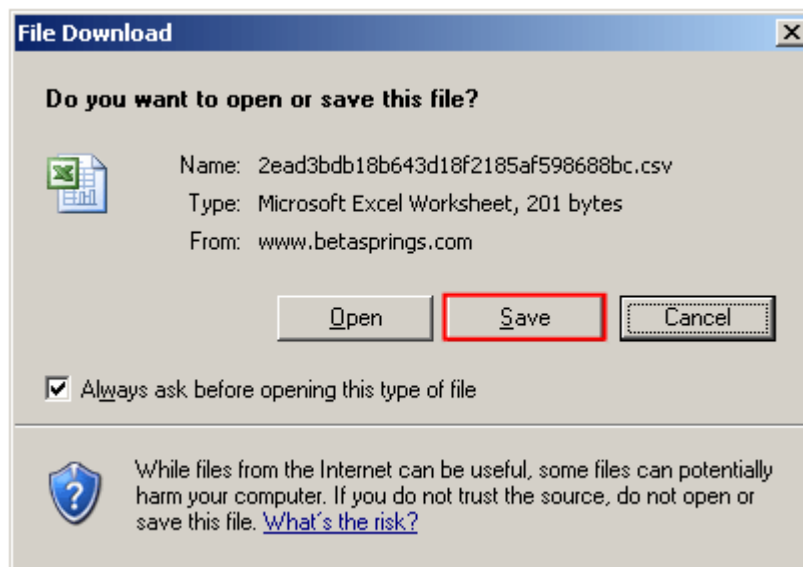


Figure 35: Exporting user information (step 3/4)

Click "Save" to save the exported file to your PC. The following screen will be displayed.

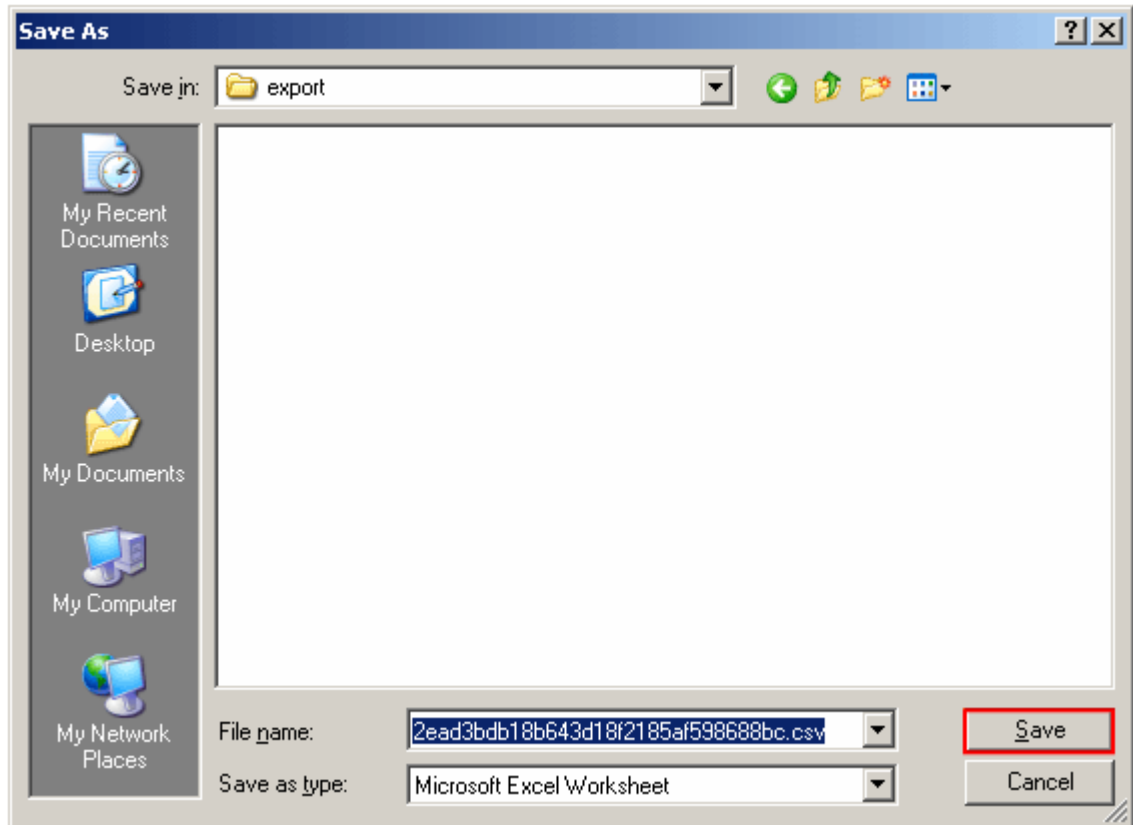


Figure 36: Exporting user information (step 4/4)

Set the desired name and location for the exported file and click on the “Save” button in order to complete the procedure of exporting the file.

10 DELETING THE MODULE

In order to delete the “Interactive User Import” module, choose option “Delete” from the main menu.

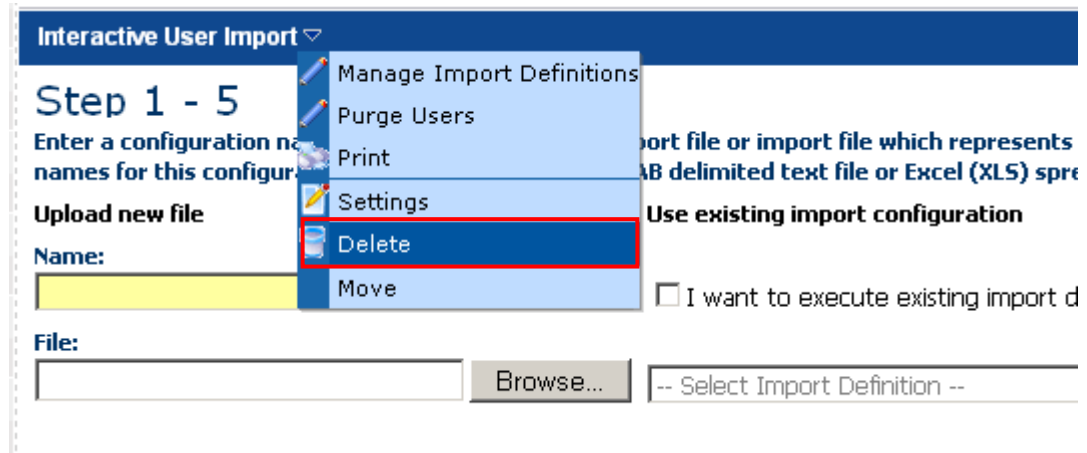


Figure 37: Deleting the module (step 1/2)

The following screen will be displayed.

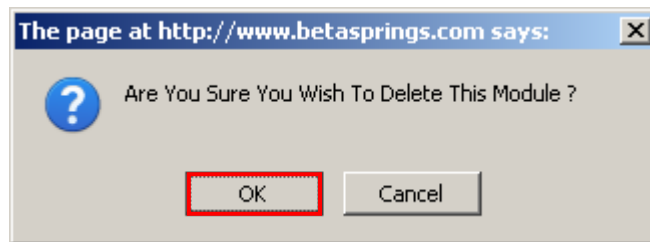


Figure 38: Deleting the module (step 2/2)

Click “OK” to confirm deletion of the module and it will be deleted.

11 TROUBLESHOOTING TECHNIQUES

We suggest these troubleshooting tips:

- The importing routine uses the DotNetNuke® scheduling system for all imports. In order to kick off and/or test the scheduler you need to have host rights and navigate to host, schedule within your portal.
- Verify that your scheduler is running, sometimes the scheduler might be set to fire off every hour so your import routine will not fire off for an hour. One tip is to simply go to Host, Scheduler, and edit the User Import schedule. Make any change such as changing the import to run every 59 minutes instead of 60. This will force the scheduler to kick off right away.
- For troubleshooting, we suggest you enable logging within step 4 of the wizard. This will log each and every step during the import such as each user, any Interactive Events and their details, etc...
- If some users are importing and others are not we suggest you take a look at the password field you are importing. Does it meet the password field requirements for the site? If so we suggest you either change the password requirements for the site or import passwords that match the portals requirements.
- If your email events are not firing off verify that you have from email and to email address specified. Please note: The email address can be token based such as \$(EmailAddress). You should also test sending an email under Admin, Newsletters. Does the email not work there? If not you should contact your hosting provider and let them know. Interactive User Import uses the same email routines as DNN so they should work.