



Great Ideas. Always Flowing.™

Interactive User Import/Export 3.0

User Guide

Table of contents:

| | | |
|-------|--|----|
| 1 | INTRODUCTION | 4 |
| 1.1 | What's New in 3.0..... | 4 |
| 2 | INSTALLATION PROCEDURE..... | 5 |
| 3 | ADDING INTERACTIVE USER IMPORT MODULE TO A PAGE..... | 9 |
| 4 | INTERACTIVE USER IMPORT PRODUCT LICENSE..... | 11 |
| 5 | USING THE INTERACTIVE USER IMPORT MAIN MENU..... | 13 |
| 6 | PERFORMING USER IMPORT | 14 |
| 6.1 | Setting up interactive events | 21 |
| 6.2 | Distributing e-mails..... | 22 |
| 6.2.1 | Pageshot of the rich text editor (WYSIWYG) | 24 |
| 6.3 | Executing an SQL Query | 25 |
| 7 | PERFORMING AN IMPORT USING AN SQL QUERY..... | 26 |
| 8 | USING EXISTING IMPORT DEFINITION | 28 |
| 9 | MANAGING IMPORT DEFINITIONS..... | 30 |
| 9.1 | Deleting an import definition..... | 31 |
| 10 | PURGING USERS | 32 |
| 11 | VIEWING THE LOG RESULTS | 33 |
| 12 | PERFORMING USER EXPORT | 34 |
| 13 | DELETING THE MODULE..... | 36 |
| 14 | TROUBLESHOOTING TECHNIQUES..... | 37 |
| 14.1 | Scheduler not enabled..... | 37 |

List of figures:

| | | |
|------------|--|----|
| Figure 1: | Installation procedure (step 1/9) | 5 |
| Figure 2: | Installation procedure (step 2/9) | 5 |
| Figure 3: | Installation procedure (step 3/9) | 6 |
| Figure 4: | Installation procedure (step 4/9) | 6 |
| Figure 5: | Installation procedure (step 5/9) | 7 |
| Figure 6: | Installation procedure (step 6/9) | 7 |
| Figure 7: | Installation procedure (step 7/9) | 8 |
| Figure 8: | Installation procedure (step 8/9) | 8 |
| Figure 9: | Installation procedure (step 9/9) | 8 |
| Figure 10: | Adding a module to a page..... | 9 |
| Figure 11: | Interactive User Import module added to the page (pageshot 1/2) | 10 |
| Figure 12: | Interactive User Import module added to the page (pageshot 2/2) | 10 |
| Figure 13: | Licensing your copy of Interactive User Import module (step 1/2) | 11 |
| Figure 14: | Licensing your copy of Interactive User Import module (step 2/2) | 11 |
| Figure 15: | Using the interactive user import main menu | 13 |
| Figure 16: | Importing a file (step 1/5)..... | 14 |
| Figure 17: | Importing a file (step 2/5)..... | 15 |
| Figure 18: | Importing from a CSV file..... | 16 |
| Figure 19: | Importing a file (step 3/5)..... | 17 |
| Figure 20: | Importing a file (step 4/5)..... | 18 |
| Figure 21: | Importing a file (step 5/5)..... | 20 |
| Figure 22: | Import successfully performed..... | 20 |
| Figure 23: | Setting up interactive events | 21 |
| Figure 24: | Distributing email | 22 |
| Figure 25: | Event successfully created | 23 |
| Figure 26: | Rich text formatting..... | 24 |
| Figure 27: | Executing SQL query..... | 25 |
| Figure 28: | Performing an import using an SQL query | 26 |
| Figure 29: | Using an existing import definition (step 1/3) | 28 |
| Figure 30: | Using an existing import definition (step 2/3) | 28 |
| Figure 31: | Using an existing import definition (step 3/3) | 29 |
| Figure 32: | Choosing option "Manage Import Definitions" | 30 |
| Figure 33: | Managing import definitions..... | 30 |

| | |
|--|----|
| Figure 34: Deleting an import definition (step 1/2)..... | 31 |
| Figure 35: Deleting an import definition (step 2/2)..... | 31 |
| Figure 36: Purging users (step 1/2) | 32 |
| Figure 37: Purging users (step 2/2) | 32 |
| Figure 38: Viewing the log results (step 1/2) | 33 |
| Figure 39: Viewing the log results (step 2/2) | 33 |
| Figure 40: Exporting user information (step 1/3) | 34 |
| Figure 41: Exporting user information (step 2/3) | 34 |
| Figure 42: Exporting user information (step 3/3) | 35 |
| Figure 43: Deleting the module (step 1/2) | 36 |
| Figure 44: Deleting the module (step 2/2) | 36 |
| Figure 45: Enabling the scheduler (step 1/3)..... | 37 |
| Figure 46: Enabling the scheduler (step 2/3)..... | 38 |
| Figure 47: Enabling the scheduler (step 3/3)..... | 38 |

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.

1.1 What's New in 3.0

- **Popular Request:** New feature to execute imports of users based on a SQL Query – Previous versions allowed you to import files from CSV, TAB, XLS, and XLSX but now new enhancements allow you to use a SQL statement for the user import. The SQL query can utilize the standard DNN connection or an alternate connection string. As with other import definitions – You can always save the import definition and use it over and over again!
- **New features added to optionally update user credential fields** (previous versions only allowed update of user profile fields)
- **New features added to optionally fire off SQL statements** before imports take place and after imports take place --- Allows for further work flow such as disabling everyone from a role, setting a import flag on the user, etc...
- **New UI** specifically enhanced for DNN 6.x users
- **Other great features** (includes extended reports for the import email report, access to sample import files, etc)

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, choose **Extensions** from the **Host** menu”.

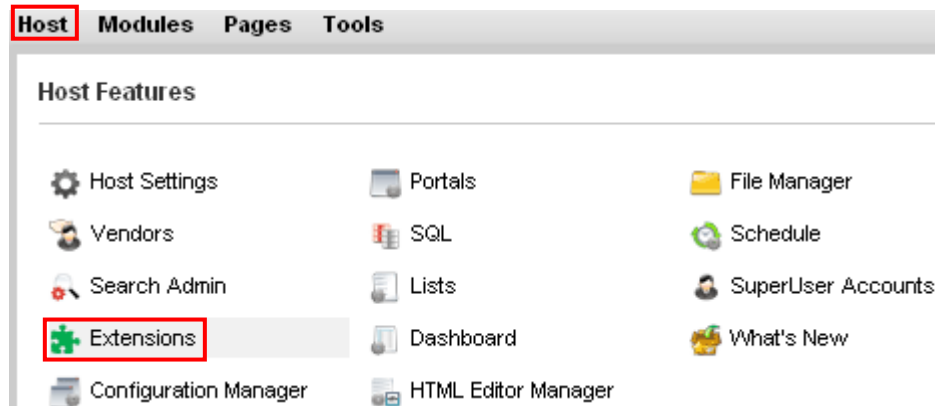


Figure 1: Installation procedure (step 1/9)

The following page will be displayed.

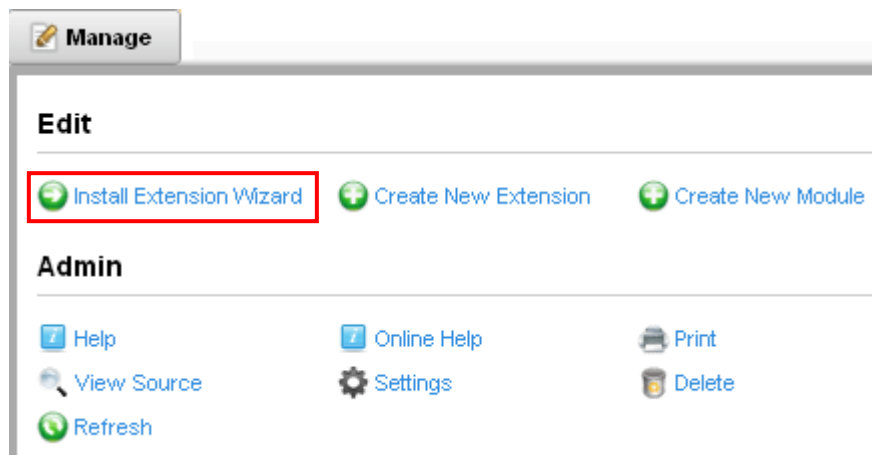


Figure 2: Installation procedure (step 2/9)

Click **Install Extension Wizard** to continue installing “Interactive User Import” and the following page will be displayed.

My Website > Extensions

Upload New Extension Package

7 DotNetNuke can be extended in many ways. This wizard helps you upload and install

Use the Browse button to browse your local file system to find the extension package you want then click Next to continue.

Choose File No file chosen

7 Your site is configured with a maximum file upload size of 2047 MB.

Next Cancel

Figure 3: Installation procedure (step 3/9)

Click **Choose File** to locate the installation file on your PC.

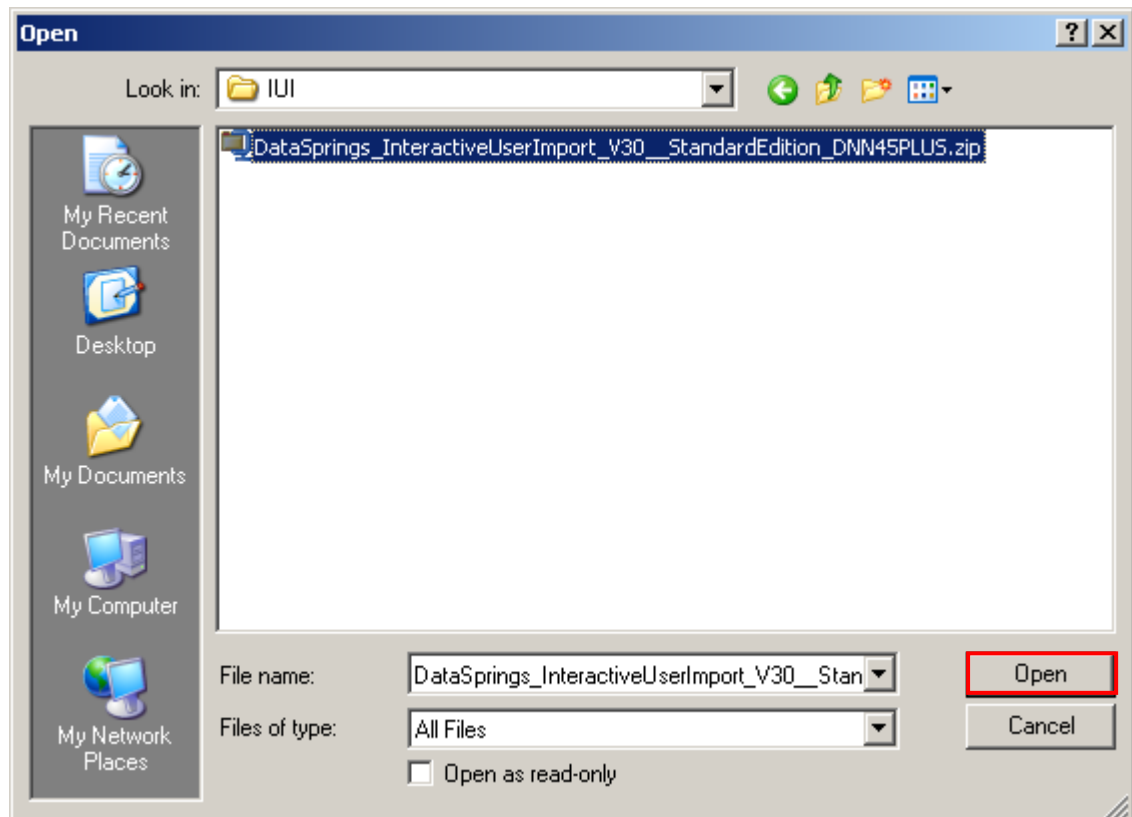


Figure 4: Installation procedure (step 4/9)

Locate the installation file and click **Open**. The following page will be displayed.

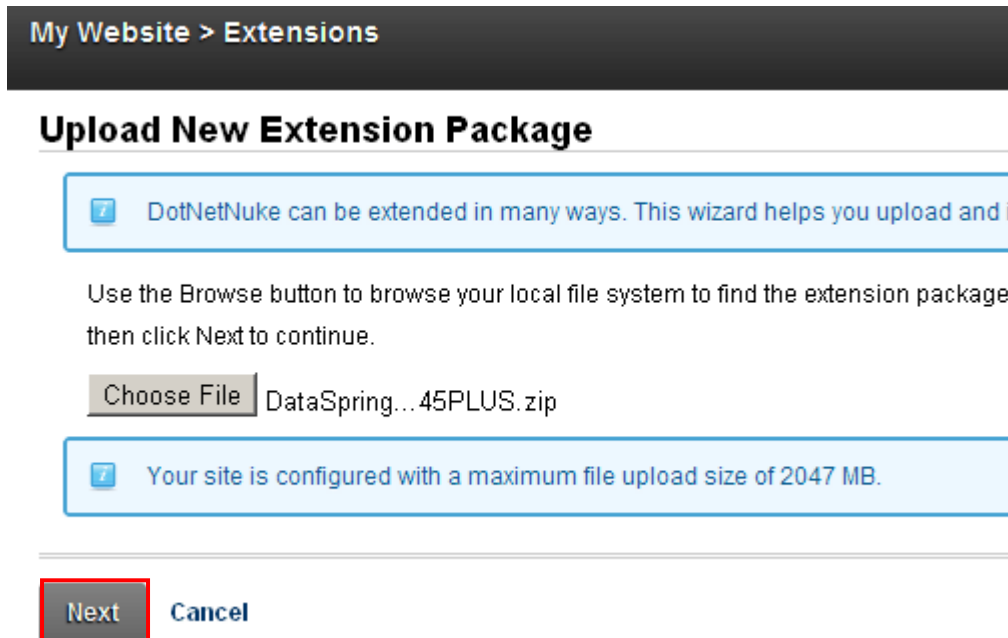


Figure 5: Installation procedure (step 5/9)

Click **Next** and the “Package Information” will be displayed.

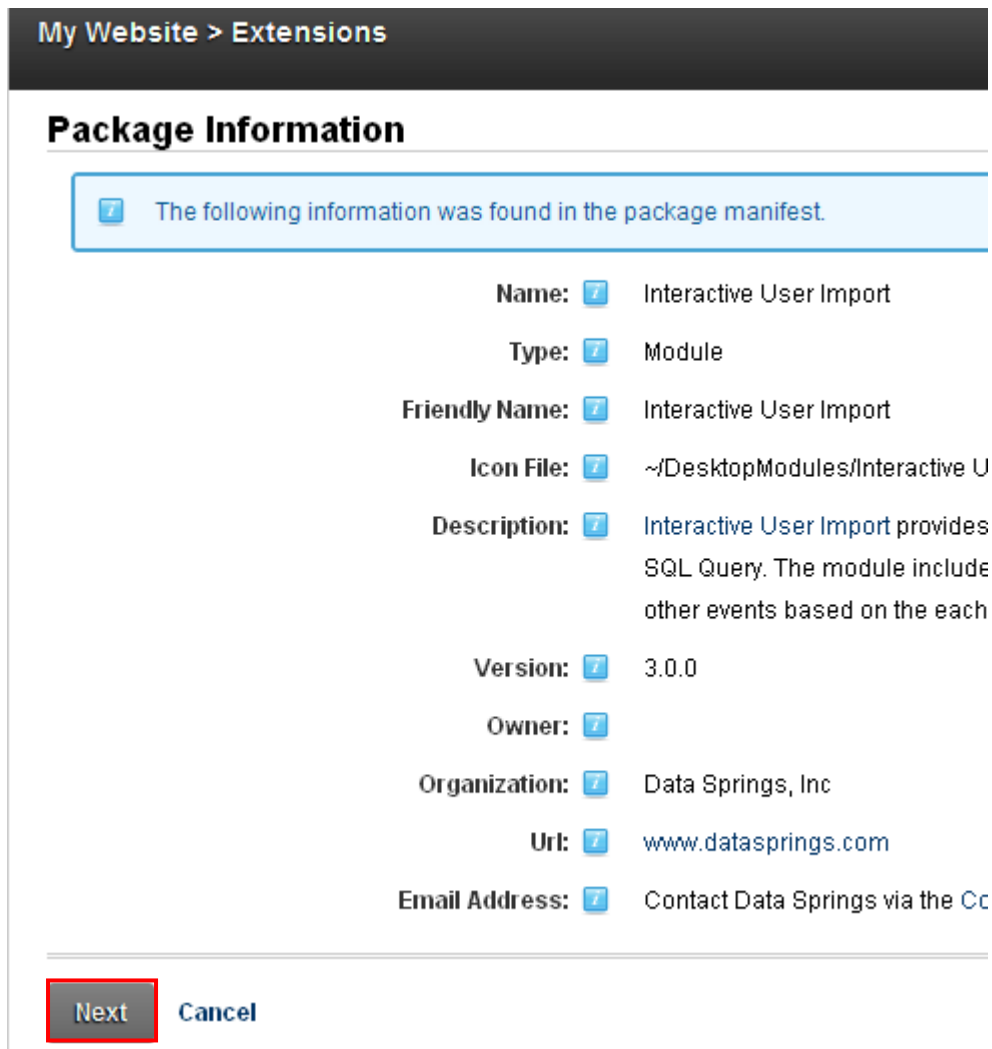


Figure 6: Installation procedure (step 6/9)

Click “Next” and the “Release Notes” page will be displayed.

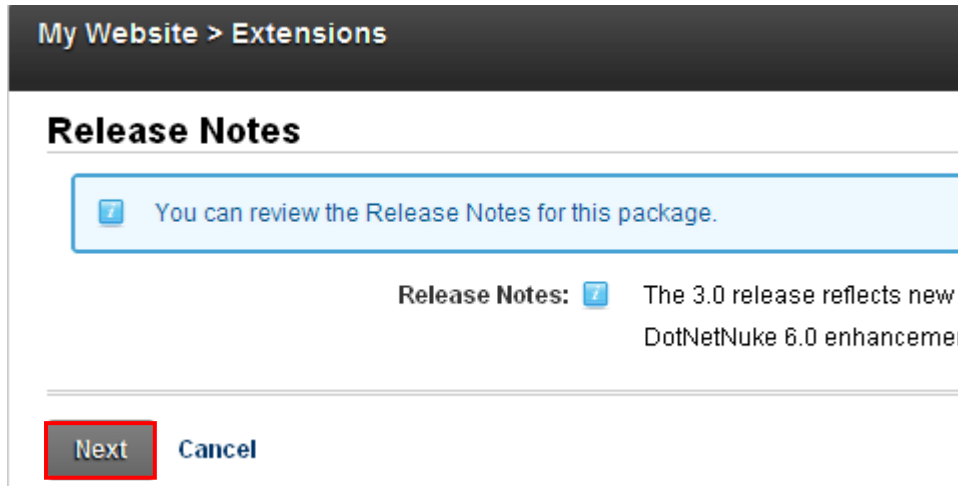


Figure 7: Installation procedure (step 7/9)

Click “Next” and the “Review License” page will be displayed.

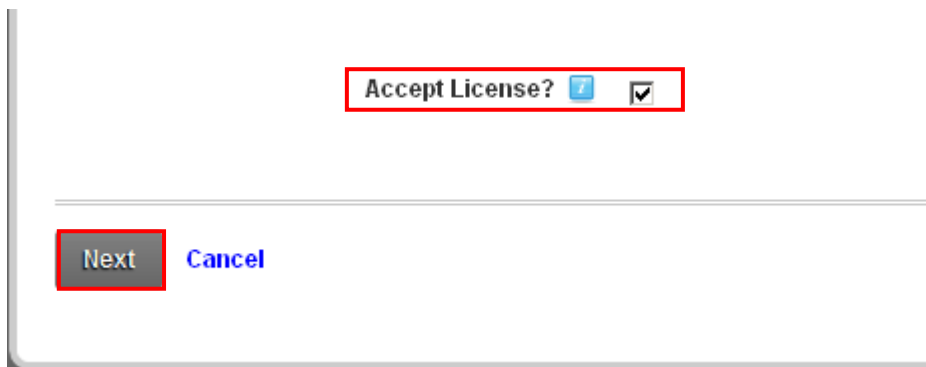


Figure 8: Installation procedure (step 8/9)

Select the “Accept License” to indicate that you accept the license and click **Next**. The installation will begin and after a couple of moments you will see the confirmation message in the bottom of the page.

Info Installation committed
 Info Installation successful. - Interactive User Import
 Info Deleted temporary install folder

EndJob Installation successful.

Return

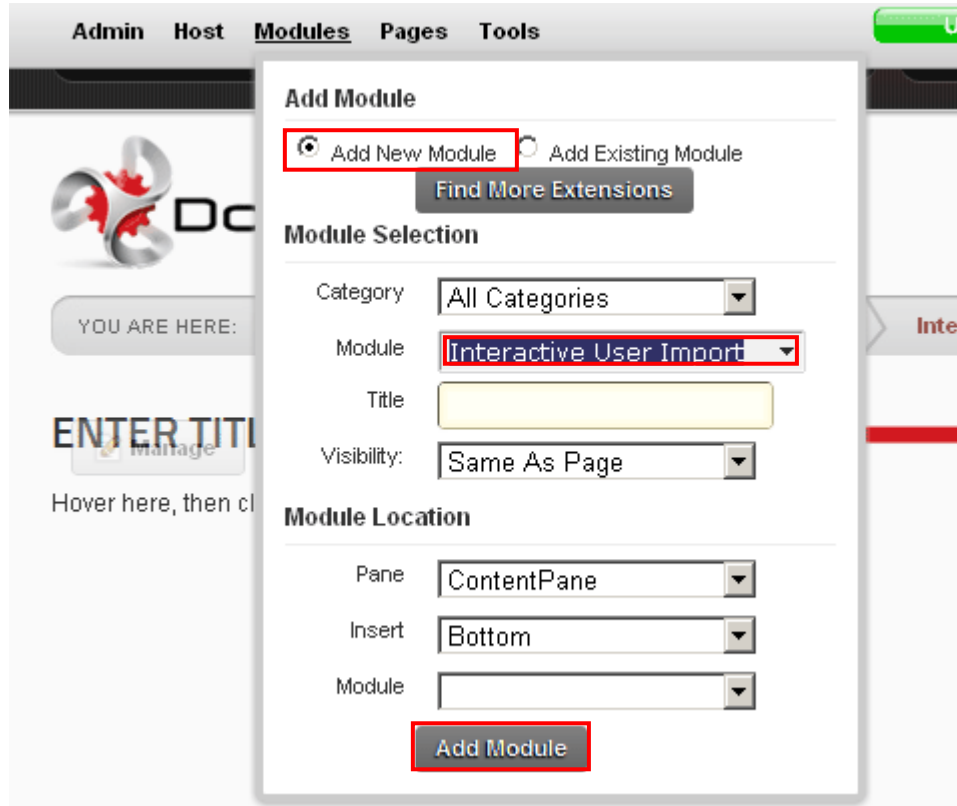
Figure 9: Installation procedure (step 9/9)

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 **Add New Module**
2. Choose **Interactive User Import** from the **Module** pull down menu
3. Click **Add Module**



The screenshot shows the 'Add Module' dialog box in a web application. The dialog is titled 'Add Module' and has two radio buttons: 'Add New Module' (selected) and 'Add Existing Module'. Below the radio buttons is a 'Find More Extensions' button. The 'Module Selection' section contains a 'Category' dropdown set to 'All Categories', a 'Module' dropdown set to 'Interactive User Import', a 'Title' text input field, and a 'Visibility' dropdown set to 'Same As Page'. The 'Module Location' section contains a 'Pane' dropdown set to 'ContentPane', an 'Insert' dropdown set to 'Bottom', and an empty 'Module' dropdown. At the bottom of the dialog is an 'Add Module' button.

Figure 10: Adding a module to a page

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

INTERACTIVE USER IMPORT

[Manage](#)

New Import From Text / Excel File upload (CSV, TXT, TAB, XLS, XLSX)
 New Import From SQL Query
 Existing Import Definition

Enter a configuration name and selected a sample import file or import file names for this configuration. You can import CSV or TAB delimited text file or Excel 97 / 2007 (XLS / XLSX) spreadsheet.

Upload new file

Name:

File: No file chosen

Having problems importing your IUI file?
Check out these IUI import examples and tips.

Previous | **Next** | Finish

Figure 11: Interactive User Import module added to the page (pageshot 1/2)

INTERACTIVE USER EXPORT

[Manage](#)

Select Fields [?](#)

Username Unit Fax
 Password Street Website
 First Name City IM
 Last Name Region Photo
 DisplayName Country Biography
 e-mail PostalCode PreferredTimeZone
 Prefix Telephone TimeZone
 MiddleName Cell PreferredLocale
 Suffix

Select Roles [?](#)

Administrators Subscribers Translator (en-US)
 Registered Users

Export Delimiter [?](#)

Portal Administrator may have disabled this feature.

Export

Figure 12: Interactive User Import module added to the page (pageshot 2/2)

Click “Manage” to open the main menu (see section 5).

4 INTERACTIVE USER IMPORT PRODUCT LICENSE

In order to license your copy of Interactive User Import module, choose “Tailored Text License” from the main menu.

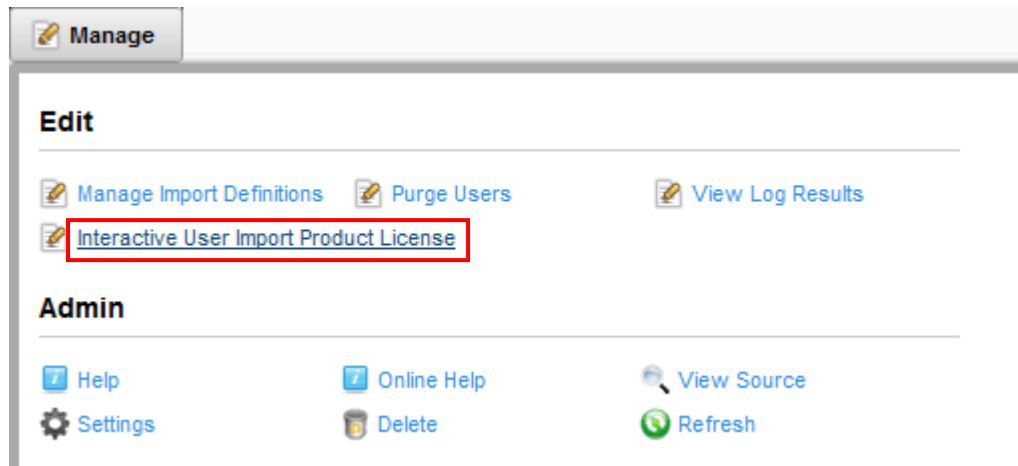


Figure 13: Licensing your copy of Interactive User Import module (step 1/2)

The following page will be displayed.

DATA SPRINGS PRODUCT LICENSING

| | |
|----------------------------|---------------------------------------|
| DNN Version: | 6.0.0 |
| Product: | Interactive User Import |
| Product Variant: | Standard Edition |
| Product Version: | 3.0.0.23680 |
| Machine Key: | E8EBFF68-39EA-46B0-950A-CFD11D58FD0B |
| Host Title: | DotNetNuke |
| Portals: | My Website (training.betasprings.com) |
| IP Address: | 89.216.213.151 |
| Contact / Developer Name: | <input type="text"/> |
| Contact / Developer Email: | <input type="text"/> |
| Customer Name: | <input type="text"/> |
| Invoice ID: | <input type="text"/> |

BY CHECKING THE BOX INDICATING I AGREE TO THE

Figure 14: Licensing your copy of Interactive User Import module (step 2/2)

The following information should be supplied (**note**: all parameters are required):

- **Contact/Developer name and email address** – please enter the name and email of the module developer (**note**: important because in some situations we might need to contact the developer directly)

- **Customer Name** – enter your name
- **Invoice ID** – enter the Invoice ID you have received in your email from Snowcovered.com after the purchase

5 USING THE INTERACTIVE USER IMPORT MAIN MENU

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

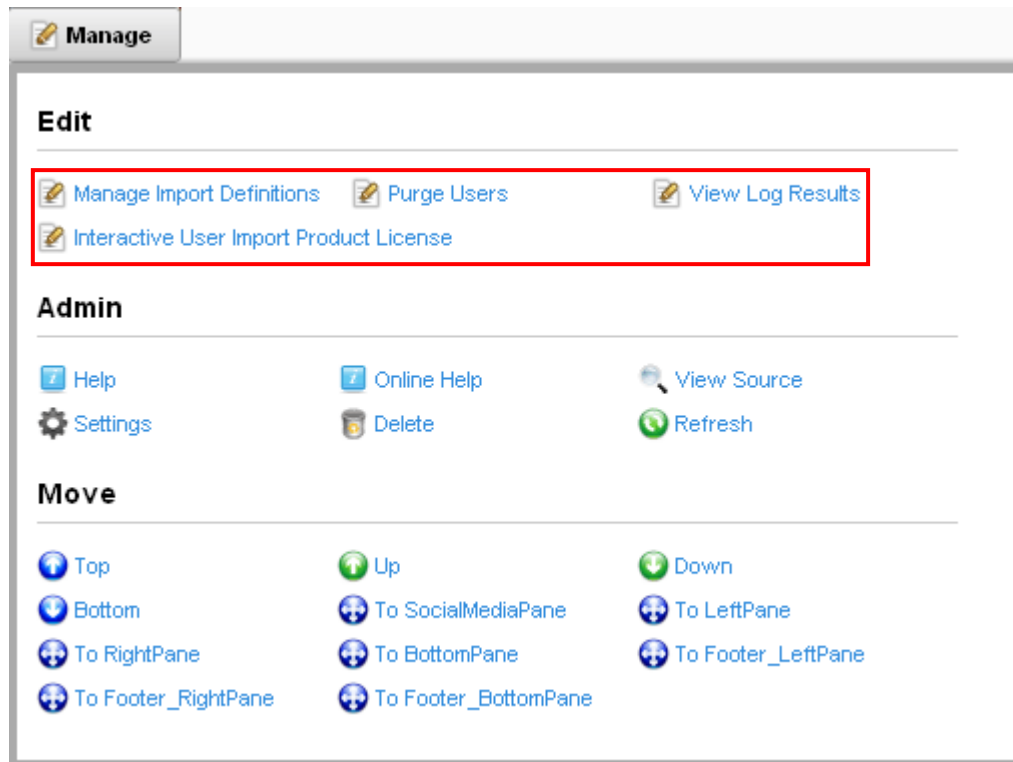


Figure 15: Using the interactive user import main menu

The following options are available inside the main menu:

- **Manage Import Definitions** – option for managing import definitions i.e. import templates (see section 9)
- **Purge Users** – option for deleting users (see section 10)
- **View Log Results** – option for viewing the log results (see section 11)
- **Interactive User Import Product License** – the option for licensing your copy of Interactive User Import module (see section 4)
- **Settings** – option for managing standard module settings
- **Delete** – option for deleting the module instance (see section 13)

6 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.

Before performing the 5 steps, choose the desired import method:

- **New Import From Text/Excel File** – the information below will describe this method in detail
- **New Import From SQL Query** – choose this option to perform an import using an SQL query (see section 7)
- **Existing Import Definition** – choose this option to perform an import using an existing import definition (see section 8)

The first step is defining the file name and choosing the file which will serve as a template for importing data.

New Import From Text / Excel File upload (CSV, TXT, TAB, XLS, XLSX)

New Import From SQL Query

Existing Import Definition


STEP 1 - 5

Upload new file

Name:

File:

 users.csv

 Having problems importing your IUI file?
[Check out these IUI import examples and tips.](#)

Previous |

Figure 16: Importing a file (step 1/5)

The following parameters are available inside the first page:

- **Upload New File**
 - **Name** – input field for setting the name of import configuration
 - **File** – click **Choose File** in order to select the sample import file (**note**: you can import CSV or TAB delimited text file or Excel spreadsheet)

After setting the desired parameters click **next**. The following page will be displayed.

STEP 2 - 5

Upload New File

Sheet: [Reload](#)

| | Column Name | DotNetNuke Core Field |
|-------------------------------------|-------------|--|
| <input checked="" type="checkbox"/> | First Name | <input type="text" value="First Name"/> ▼ |
| <input checked="" type="checkbox"/> | Last Name | <input type="text" value="Last Name"/> ▼ |
| <input checked="" type="checkbox"/> | DisplayName | <input type="text" value="DisplayName"/> ▼ |
| <input checked="" type="checkbox"/> | e-mail | <input type="text" value="e-mail"/> ▼ |
| <input checked="" type="checkbox"/> | Street | <input type="text" value="Street"/> ▼ |
| <input checked="" type="checkbox"/> | City | <input type="text" value="City"/> ▼ |
| <input type="checkbox"/> | Photo | <input type="text" value="Photo"/> ▼ |

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

Figure 17: Importing a file (step 2/5)

The following parameters are available inside this page:

- **Sheet** – enter the name of the specific sheet you wish to upload the data from and click “Reload” to reload the information
- **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.

In case you are importing from the CSV file, the following page will be displayed.

STEP 2 - 5

Upload New File

Select Delimiter: , Reload

| | Column Name | DotNetNuke Core Field |
|-------------------------------------|-------------|--|
| <input checked="" type="checkbox"/> | First Name | <input type="text" value="First Name"/> |
| <input checked="" type="checkbox"/> | Last Name | <input type="text" value="Last Name"/> |
| <input checked="" type="checkbox"/> | DisplayName | <input type="text" value="DisplayName"/> |
| <input checked="" type="checkbox"/> | e-mail | <input type="text" value="e-mail"/> |
| <input checked="" type="checkbox"/> | Street | <input type="text" value="Street"/> |
| <input checked="" type="checkbox"/> | City | <input type="text" value="City"/> |
| <input type="checkbox"/> | Photo | <input type="text" value="Photo"/> |

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


Figure 18: Importing from a CSV file

Notes:

- 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

After choosing the fields you wish to import, click **Next**. The following page will be displayed.

STEP 3 - 5



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](#)

Figure 19: Importing a file (step 3/5)

The following parameters are available inside this page

- **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 6.2 - similar to above example but instead it distributes and email
- **Execute SQL Query** – see section 6.3 - Similar to above example but instead it executes a SQL statement
- **Dynamic Events in this import definition** – this part of the page 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 **Next**. The following page will be displayed.

STEP 4 - 5

Generate User Name

Generate Password?

Overwrite Existing Users?

Make all non administrators within portal unauthorized before import?

Email import history report

Email import list report to?

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?

Execute SQL query before import / after import

Force password change upon next sign in?

Automatically Authorize Users (override user registration flag for/verified in Admin/Site Settings)

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

Figure 20: Importing a file (step 4/5)

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

- **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
- **Make all non administrators within portal unauthorized before import?** – select this option to un-authorize all non administrators before the import
- **Email import history report** – enter the email address of the person who should receive the via email a report of which users were imported
- **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
- **Execute SQL query before import / after import** – select this option to execute a SQL query before and after the import? I need more information about this option. You can choose a unique query before the import runs and also a unique query to be executed after the import has finished executing. This workflow can be useful if you wanted to always remove the user from a role or set another flag somewhere within the database before or after (or both) the import definition executes.
- **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 **Next**. The following page will be displayed.

STEP 5 - 5

PREVIEW DATA

| First Name | Last Name | DisplayName | e-mail | Street | City |
|------------|-----------|-------------|----------------------|------------------------------------|---------|
| John | Smith | jsmith | jsmith@address.com | Aberdeen Ave 944S Aberdeen St. | Chicago |
| Ted | Smith | tsmith | tsmith@address.com | East St. Lavergne Ave 5199N | Chicago |
| Sarah | Smith | ssmith | ssmith@address.com | Fairfield Ave. Artesian Ave. 11500 | Chicago |
| Jennifer | Smith | jensmith | jensmith@address.com | Gambrinus St. Francisco Ave 3800 | Chicago |
| Martha | Smith | msmith | msmith@address.com | Hale St Burling St. 2800 | Chicago |
| Jerry | Smith | jerrysmith | jsmith@address.com | Kaskaskia Ave. Komensky Ave. 1200 | Chicago |

CORE INTEGRATION

DYNAMIC EVENTS

IMPORT OPTIONS

Automatically start the User Import Scheduler Process?

Previous | Next |
Finish

Figure 21: 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 **Finish** to complete the procedure. The following page will be displayed.

INTERACTIVE USER IMPORT

✔

Message The import job has been created. Please visit Host Settings - Schedule for a more details. can also kick off the Interactive User Import schedule or view the import logs from the links below.

Run Interactive User Import Schedule Process Now

View Log Results

Figure 22: Import successfully performed


The following options are available:

- **Run Interactive User Import Schedule Process Now** – click this link to immediately run the user import schedule
- **View Log Results** – click this link to see the log results

6.1 Setting up interactive events

This section will explain how to setup various interactive events.

STEP 3 - 5



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](#)

Figure 23: Setting up interactive events

The following parameters are available inside this page

- **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 6.2 - Similar to above example but instead it distributes and email
- **Execute SQL Query** – see section 6.3 - Similar to above example but instead it executes a SQL statement

After setting the desired parameters click **Next**.

6.2 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.

E-mail Settings:

From Name

From Email

TO

Subject

Message Editor: Basic Text Box Rich Text Editor

Rich Text Editor

Dear \$(FirstName),

Words: 2 Characters: 15

When: and =

Add Event

Figure 24: Distributing email

The following parameters are available inside this page:

- **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 26)

- **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.

E-mail Settings:

From Name John Smith

From Email jsmith@address.com

TO sarahsmith@address.com

Subject Import

Message Editor: Basic Text Box Rich Text Editor

Rich Text Editor

Link to Portal Page...

Paragraph Style Apply CSS Clas

Dear \$(FirstName),

Design HTML

Preview Words: 2 Characters: 15

When: and

Dynamic Events in this import definition:

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

Previous |

Figure 25: Event successfully created

Click **Next** to continue defining this import.

6.3 Executing an SQL Query

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

Figure 27: Executing SQL query

The following parameters are available inside this page:

- **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

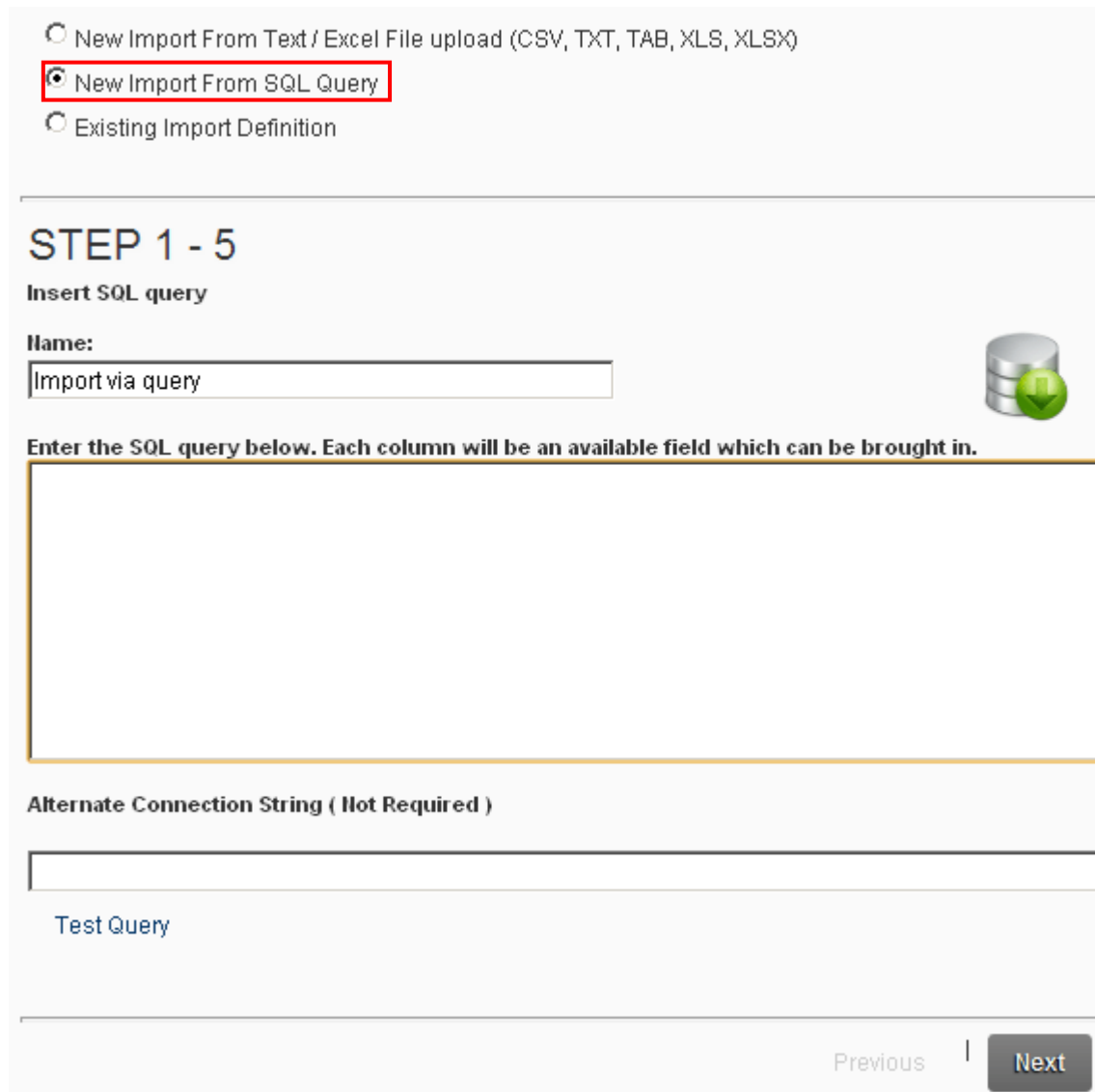
After setting the desired parameters, click **Next** in order to continue the import.

7 PERFORMING AN IMPORT USING AN SQL QUERY

The Interactive User Import module allows you to execute user import based on an SQL query. The SQL query can utilize the standard DNN connection or an alternate connection string.

In addition, you can save this as an import definition and use it again whenever you need it.

In order to start importing user via an SQL query, choose **New Import From SQL query**. The page will be refreshed containing further parameters for setting up this type of import.



The screenshot shows the 'New Import From SQL Query' option selected in a radio button group. Below this, the interface is titled 'STEP 1 - 5' and 'Insert SQL query'. A 'Name:' label is followed by a text input field containing 'Import via query'. To the right of the input field is a database icon with a green checkmark. Below the input field is a large text area for entering the SQL query, with the instruction 'Enter the SQL query below. Each column will be an available field which can be brought in.' Below the text area is a label 'Alternate Connection String (Not Required)' followed by another text input field. At the bottom left of the form is a 'Test Query' button. At the bottom right are 'Previous' and 'Next' navigation buttons.

Figure 28: Performing an import using an SQL query

The following import parameters are available:

- **Name** – enter the name for this import which will help you differentiate it from other import definitions
- **Enter the SQL query text area** – enter the actual query inside this text area. You should return a column name for each imported field you would like to import as a user.

Example:

This example would pull from the existing database source but have a new column created called `MyNewUserName` that would include the current username followed by – `MyTestUser`). You will have the opportunity within the next step to choose which columns

map to which DNN user credential and user profile fields so there is no need to worry about always making sure you have the exact columns in the query:

```
Select Users.UserName as [MyNewUserName] + ' -MyTestUser', * from  
Users
```

- **Alternate Connection String** – This is the connection string that would be used instead of the standard DotNetNuke connection string. The connection string would be similar to the connection string used within DotNetNuke:
 - Data Source=localhost;Initial Catalog=DNN6;User ID=sa;Password=test12345
- **Test Query** – click this option to make sure the query is giving the expected results
- **Next** – once you set the desired parameters, click **Next** to continue

8 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 **Next**.

INTERACTIVE USER IMPORT

New Import From Text / Excel File upload (CSV, TXT, TAB, ...)

New Import From SQL Query

Existing Import Definition

STEP 1 - 5

Enter a configuration name and selected a sample import file configuration. You can import CSV or TAB delimited text file or Excel 97 / 2007 (XLS / XLSX) spreadsheet.

Use existing import configuration

-- Select Import Definition --

Previous | **Next**

Figure 29: Using an existing import definition (step 1/3)

The following page will be displayed.

STEP 2 - 5

Upload New File

Select Delimiter: [Reload](#)

| | Column Name | DotNetLuke Core Field |
|-------------------------------------|-------------|---|
| <input checked="" type="checkbox"/> | First Name | <input type="text" value="First Name"/> |
| <input checked="" type="checkbox"/> | Last Name | <input type="text" value="Last Name"/> |

Figure 30: Using an existing import definition (step 2/3)

This page 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 page will be displayed after you click **Upload New File**.

STEP 2 - 5

Select the file you like to upload No file chosen

Select Delimiter:

| | Column Name | DotNetLuke Core Field |
|-------------------------------------|-------------|---|
| <input checked="" type="checkbox"/> | First Name | <input type="text" value="First Name"/> |

Figure 31: Using an existing import definition (step 3/3)

Click **Choose File** to locate the desired file on your PC and then click **Upload** to begin importing the data from the new file.

9 MANAGING IMPORT DEFINITIONS

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

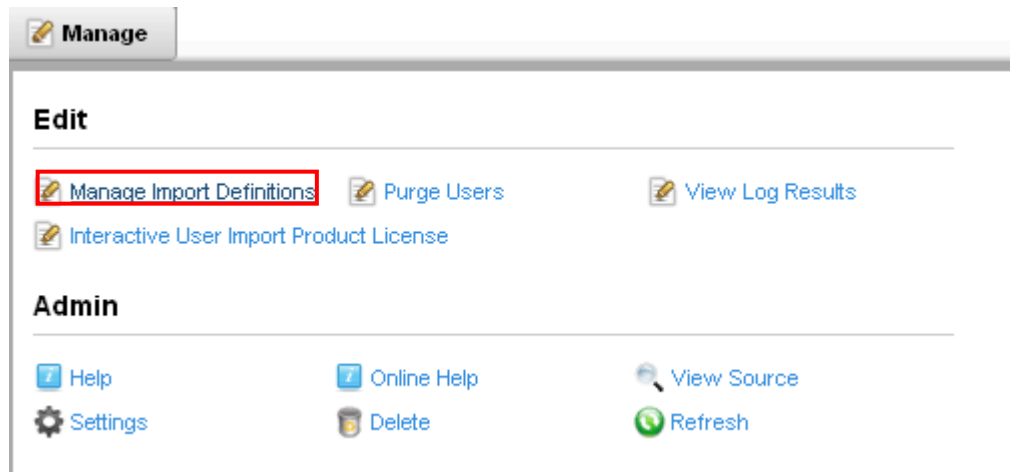


Figure 32: Choosing option “Manage Import Definitions”

The following page will be displayed.

The screenshot shows the 'Manage Import Definitions' page with a table of import definitions. The table has columns for Status, ID, Name, Created By, Created Date, Changed By, Changed Date, and Active/Inactive. There are four rows of data, each with a red 'X' icon in the Status column and a green light icon in the Active/Inactive column.

| Status | ID | Name | Created By | Created Date | Changed By | Changed Date | Active/Inactive |
|--------|----|---------------|------------|--------------|------------|--------------|-----------------|
| ✗ | 1 | My new import | host | 8/29/2011 | host | 8/29/2011 | False |
| ✗ | 2 | My new import | host | 8/29/2011 | host | 8/29/2011 | True |
| ✗ | 3 | My new import | host | 8/29/2011 | host | 8/29/2011 | False |
| ✗ | 4 | My new import | host | 8/29/2011 | host | 8/29/2011 | True |

Figure 33: Managing import definitions

The following parameters and options are available inside this page:

- ✗ - option for deleting an import definition (see section 9.1)
- **Status** – the green light means that this import definition is currently active and will process once the scheduler kicks off. A red icon means that this import definition has already been executed or is no longer active.
- **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/Inactive** – field displaying the import definition status

9.1 Deleting an import definition

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

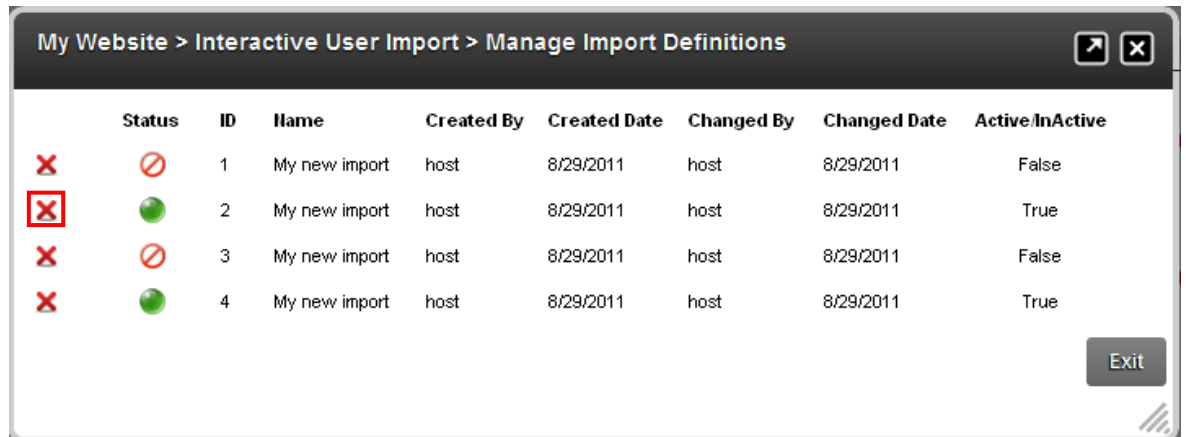


Figure 34: Deleting an import definition (step 1/2)

The following page will be displayed.

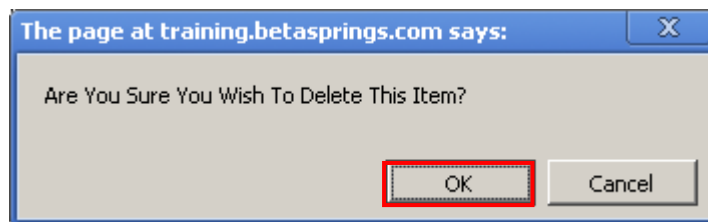


Figure 35: Deleting an import definition (step 2/2)

Click **OK** and the import definition will be deleted.

10 PURGING USERS

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

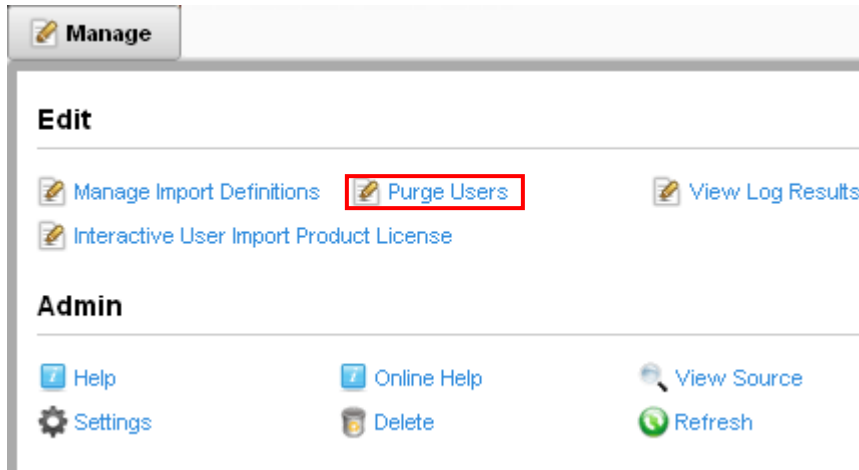


Figure 36: Purging users (step 1/2)

The following page will be displayed.

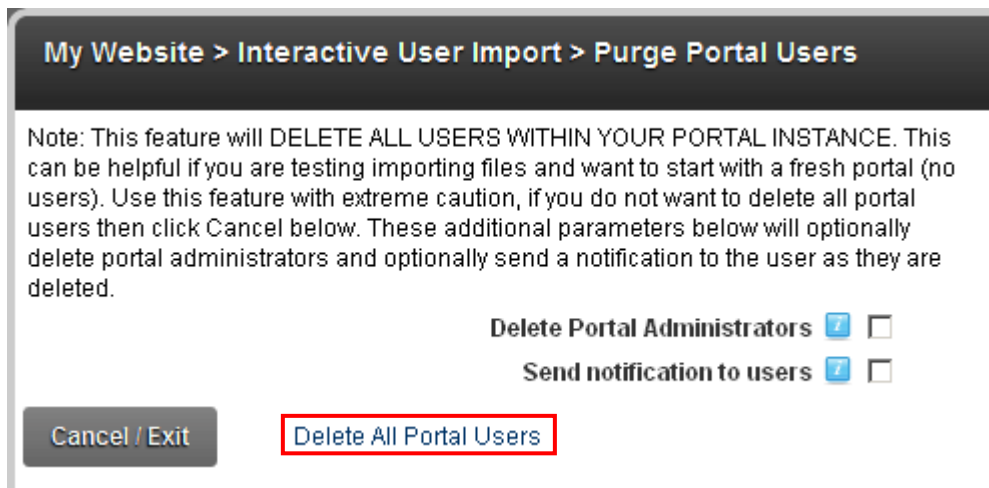


Figure 37: Purging users (step 2/2)

The following other parameters are available inside this page:

- **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 **Delete All Portal Users** and the users will be deleted.

11 VIEWING THE LOG RESULTS

In order to easily access the log results, choose option “View Log Results” from the main menu.

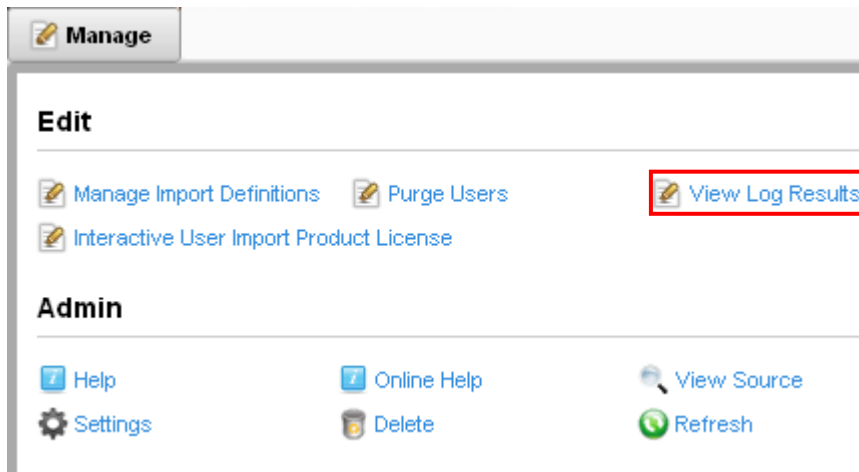


Figure 38: Viewing the log results (step 1/2)

The following page will be displayed.

The screenshot shows the 'View Log Results' page. At the top, there is a breadcrumb trail: 'My Website > Interactive User Import > View Log Results'. Below this, there are two buttons: 'Run Interactive User Import Schedule Process Now' and 'Cancel / Exit'. There are also two icons: 'Refresh History' and 'Clear Import History'. The main content is a table with the following columns: 'Description', 'Duration', 'Succeeded', and 'Start/End/Next Start'.

| Description | Duration | Succeeded | Start/End/Next Start |
|--|----------|-----------|--|
| DataSprings.DNN.Modules.UserImport.UserImportProcess, DataSprings.DNN.Modules.UserImport Interactive User Import Log: importing:'My new import'; build:'3.0.0.23680'; logging disabled for this import - you can enable logging within the import options for a detailed view of the import process.; Successfully Loaded File w/ Row Count:'7'; total records imported:7; importing:'My new import'; build:'3.0.0.23680'; logging disabled for this import - you can enable logging within the import options for a detailed view of the import process.; Successfully Loaded File w/ Row Count:'7'; total records imported:7; | 0.17 | True | S: 8/30/2011 1:37:56 AM E: 8/30/2011 1:37:56 AM N: 8/30/2011 2:37:56 AM |
| DataSprings.DNN.Modules.UserImport.UserImportProcess, DataSprings.DNN.Modules.UserImport Interactive User Import Log: | 0.017 | True | S: 8/30/2011 12:37:49 AM E: 8/30/2011 12:37:49 AM N: 8/30/2011 1:37:49 AM |
| DataSprings.DNN.Modules.UserImport.UserImportProcess, DataSprings.DNN.Modules.UserImport Interactive User Import Log: | 0.11 | True | S: 8/29/2011 11:37:42 PM E: 8/29/2011 11:37:42 PM N: 8/30/2011 12:37:42 AM |
| DataSprings.DNN.Modules.UserImport.UserImportProcess, DataSprings.DNN.Modules.UserImport Interactive User Import Log: | 0 | True | S: 8/29/2011 9:58:10 PM E: 8/29/2011 9:58:10 PM N: 8/29/2011 10:58:10 PM |

Figure 39: Viewing the log results (step 2/2)

The following options and parameters are available:

- **Run Interactive user Import Schedule Process Now** – click this link to start the import schedule process immediately
- **Refresh History** – click this link to refresh the lower part of the page with import history
- **Clear Import History** – click this link to clear the import history
- **Cancel/Exit** – click this link to cancel and return to the previous page

12 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 ?

Username Unit Fax

Password Street Website

First Name City IM

Last Name Region Photo

DisplayName Country Biography

e-mail PostalCode PreferredTimeZone

Prefix Telephone TimeZone

MiddleName Cell PreferredLocale

Suffix

Select Roles ?

Administrators Subscribers Translator (en-US)

Registered Users

Export Delimiter ?

Portal Administrator may have disabled this feature.

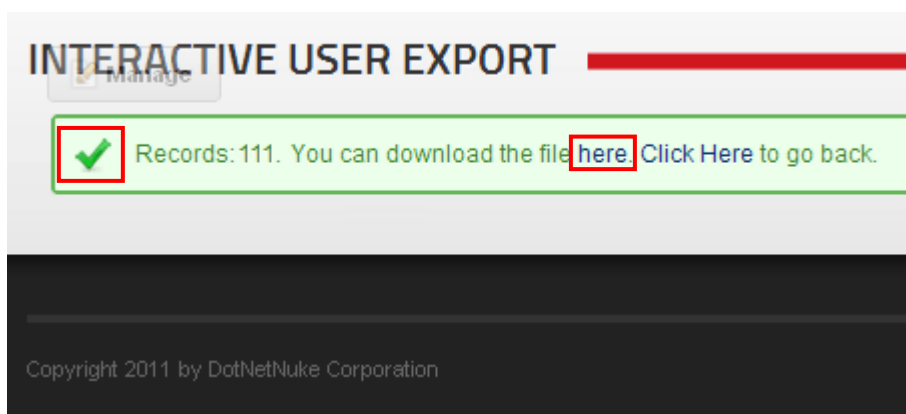
Export

Figure 40: Exporting user information (step 1/3)

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 page will be displayed.



INTERACTIVE USER EXPORT

Records: 111. You can download the file [here](#). [Click Here to go back.](#)

Copyright 2011 by DotNetNuke Corporation

Figure 41: Exporting user information (step 2/3)

The “OK” icon displayed in the left hand corner denotes the successful export. Click [here](#) to download the file. The following page will be displayed.

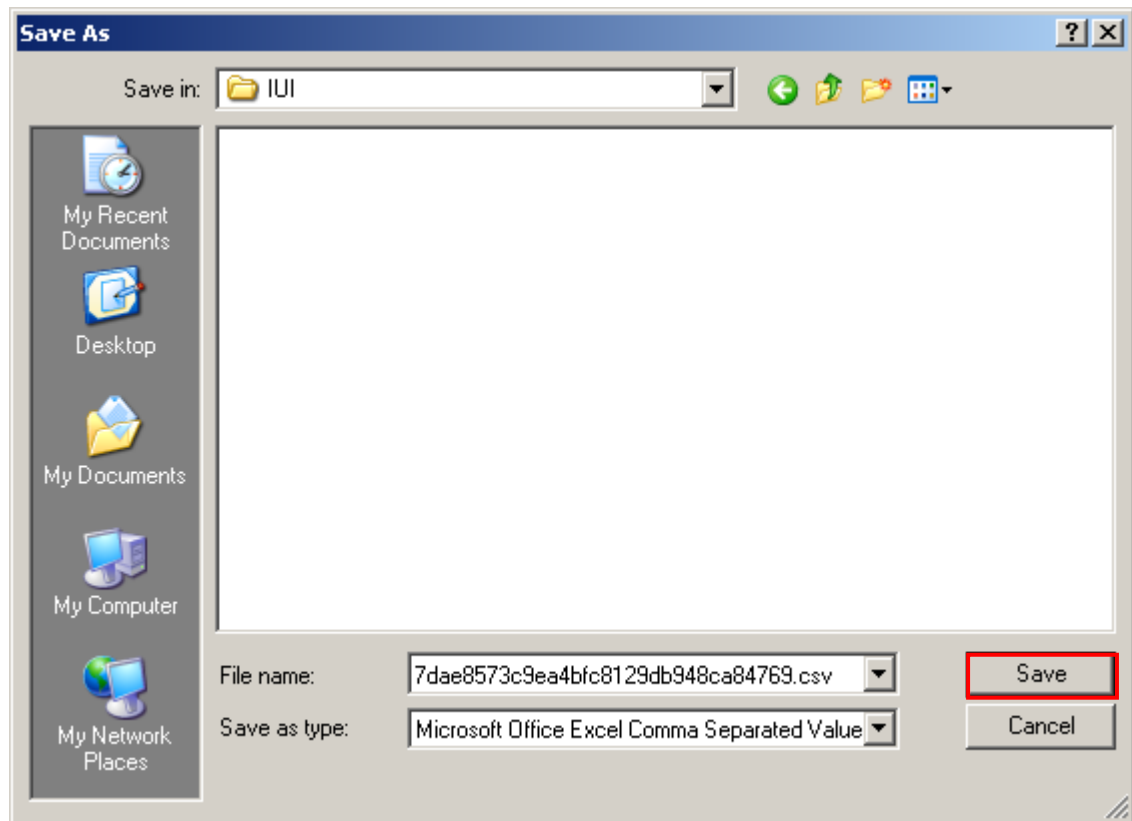


Figure 42: Exporting user information (step 3/3)

Set the desired name and location for the exported file and click **Save** in order to complete the procedure of exporting the file.

13 DELETING THE MODULE

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

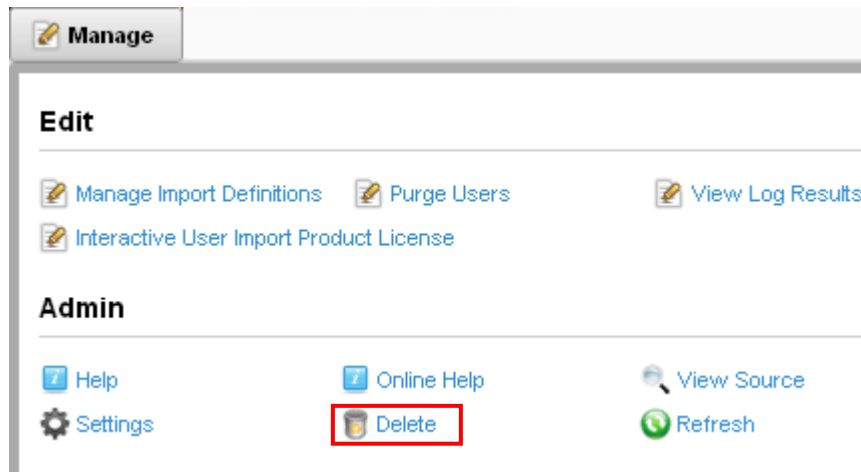


Figure 43: Deleting the module (step 1/2)

The following page will be displayed.

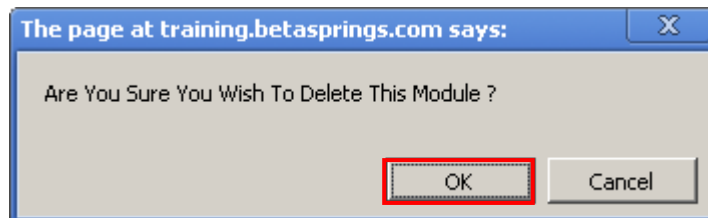


Figure 44: Deleting the module (step 2/2)

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

14 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.

14.1 Scheduler not enabled

In case the scheduler is not enabled and you get this error:



Warning: Interactive User Import Scheduler Not Enabled

We tried to initiate the scheduler for Interactive User Import however the scheduler is not currently enabled. Please enable the scheduler under host/schedule

Choose the “Schedule” option from the “Host” menu.

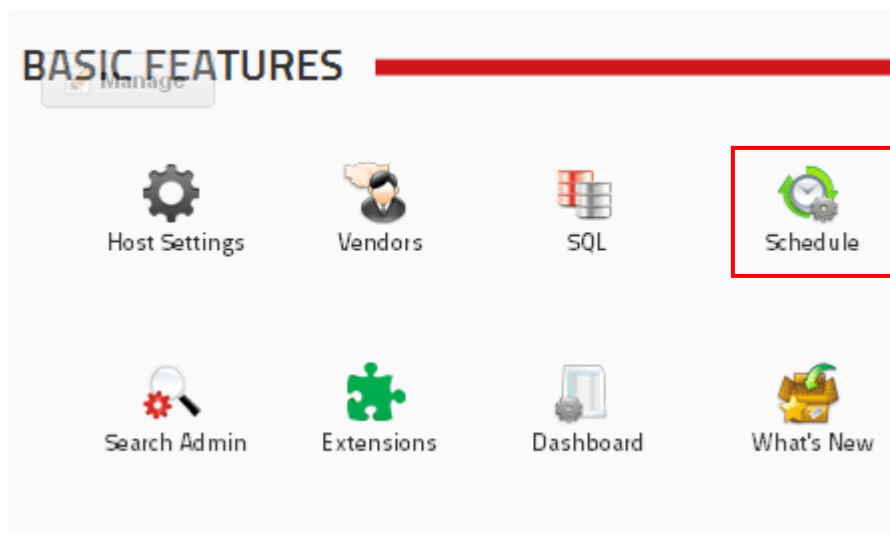


Figure 45: Enabling the scheduler (step 1/3)

The following page will be displayed.















| SCHEDULE  | | |
|--|-------------------------------------|------------------|
| Name | Enabled | Frequency |
|  Purge Users Online | <input type="checkbox"/> | Every 1 Minute |
|  Purge Site Log | <input type="checkbox"/> | Every 1 Day |
|  Purge Schedule History | <input checked="" type="checkbox"/> | Every 1 Day |
|  Purge Log Buffer | <input type="checkbox"/> | Every 1 Minute |
|  Send Log Notifications | <input type="checkbox"/> | Every 5 Minutes |
|  Search Engine Scheduler | <input checked="" type="checkbox"/> | Every 24 Hours |
|  Purge Cache | <input type="checkbox"/> | Every 2 Hours |
|  Purge Module Cache | <input checked="" type="checkbox"/> | Every 1 Minute |
|  Messaging Dispatch | <input checked="" type="checkbox"/> | Every 1 Minute |
|  Interactive User Import | <input checked="" type="checkbox"/> | Every 60 Minutes |


Figure 46: Enabling the scheduler (step 2/3)


Find the user Import process within this page (note that the “Enabled” checkbox is not selected for this process) and click the edit icon . The following page will be displayed.

[My Website](#) > [Schedule](#) > [Edit Schedule](#)

Friendly Name: 

Full Class Name and Assembly: 

Schedule Enabled: 

Time Lapse: 


Retry Frequency: 

Figure 47: Enabling the scheduler (step 3/3)

Click **Yes** under **Schedule Enabled** to enable this process and then click **Update** to save the changes.⁷

15 RESOURCES

Here are the additional resources you can use to help you learn about the Import User Import/Export module:

- **Examples:** you can find more examples for using the module here: www.datasprings.com/UIExamples
- **Video demonstration:** <http://www.youtube.com/watch?v=Nyz955NnTAo>