



Import Logons

In addition to creating logons individually, logons can be created thru an Import routine. To access the import logon functionality your logon will need to be enabled with the “Logon Management” and “Import Logons” permission.

Once your logon has this permission you can go to Administration > Logon Management > and click on Import Logons to access the Import Logon functionality.

You will first need to create Security Levels for your workgroups.

- 1.) Go to Administration > Security Levels
- 2.) Create Security Levels either by selecting a default security level then clicking on the “Save As” button and giving your new security level a new name, OR by manually creating a new Security Level. You will want the name of this new workgroup to be unique. It is best for it to follow the following naming convention. Example: John-Doe-Workgroup – [user type], where user type is Group/Account Manager/Partner/Partner Rep/Administrator/Global.

Once you have your workgroups Security Levels you can begin to import your logons. The file you will use as your “Import Logons” file will need to be of type “.csv” (comma separated values) . This file will need to 19 Columns and must be in the following order:

- 1.) Group / Partner Name
- 2.) First Name – **Required**
- 3.) Last Name - **Required**
- 4.) Username - **Required**
- 5.) Password - **Required**
- 6.) Group
- 7.) Default Page – either “Edit Profile”, “Sales Update” or “View Profile”
- 8.) Company
- 9.) Title
- 10.) Phone
- 11.) Fax
- 12.) Mobile
- 13.) Email
- 14.) Address 1
- 15.) Address 2
- 16.) City
- 17.) StateCode – 2 character state code only (example: AL/TX/CA/etc...)
- 18.) Zip
- 19.) CountryCode – 3 character country code (example: USA/CAN/etc...)



Once you have your file go to Administration > Manage Logons and click on the “Import Logons” link in the horizontal navigation for the page. You will be taken to this page:

Import Logons - Upload Your File

First, click [Browse...] to find your file, and then click [Next >>] to upload.

The import file must be a .csv file and have a header row and 19 columns. The columns must be in the following order

1. Group / Partner Name
2. First Name
3. Last Name
4. Username
5. Password
6. Group
7. Default Page - 'Edit Profile', 'Sales Update' or 'View Profile'
8. Company
9. Title
10. Phone
11. Fax
12. Mobile
13. Email
14. Address1
15. Address2
16. City
17. StateCode - 2 character state code (e.g. 'AL')
18. Zip
19. CountryCode - 3 character country code (e.g. 'USA')

The maximum size of the import file is 5MB.

Browse to the file you will be using to import your logons. Select the file then click the Next button. On the Import Logons – Choose Workgroup and User Type screen, select the User Type from the list provided, that you will be assigning to the imported logons. NOTE – You can only import one user type list at a time. All logons in your import file will be of the same user type. Click on the “Next” button. On the Import Logons – Choose Workgroup and User Type you will select the “User type” for the logons you will be importing.

Import Logons - Choose Workgroup and User Type

Next, please select a workgroup. Imported logons will have access to this workgroup.

Workgroup:

Also, please select a user type. Imported logons may also create a(n) acct mgr / partner rep.

User Type:

Administrator

Administrator

Global User

Acct Mgr

Partner

Partner Rep

Click Next. Select the correct Security Level from the drop down as well as any Custom Label set and Message board that has been set up for your workgroup.

Import Logons - Set Parameters

Next, please select a label set, security level and message board.

Label Set:

Security Level:

Message Board:

Angela Technical Projects - Admin

Angela Technical Projects - Global

Angela Technical Projects - Group

Click Next. On the Import Logons – Summary page you will see all the information you have entered as well as a list of logons that will be imported. In the event there already exists a logon in the system that matches one in your import file you will see a notation that a duplicate logon will be created and that if you proceed an “E:” will be

Import Logons - Summary

Ready to import. Click [Finish >>] to start the import.

File: AL Logins_111620111329.csv

Workgroup: Angela Technical Projects

User Type: Partner Rep

Label Set: Standard

Security Level: Angela Technical Projects - PR

Message Board: Basic Information Board

Number of Records: 40

○ Ready to import. Records below maybe have issues.
Duplicate username(s) will still be loaded but an "E:" will be appended to the username.

First Name	Last Name	Username	Partner	Comments	Error Condition
Buddy	Starling	bstar@	Troy	new partner	duplicate logon created
Tiffani	Stephens	tnstephens@	Troy	new partner	duplicate logon created
Brenda	Campbell	bcamp@	Troy	new partner	duplicate logon created
Oliver	Aaron	coaaron@	Troy	new partner	duplicate logon created
Malerie	Filiaut	malee@	Troy	new partner	duplicate logon created
Jennifer	Gardner	jlgardner@	Troy	new partner	duplicate logon created
Jessica	Acord	jacord@	Troy	new partner	duplicate logon created