

XML Group Import Implementation

Service Description

imc Learning Suite

09.09.2024

Preface

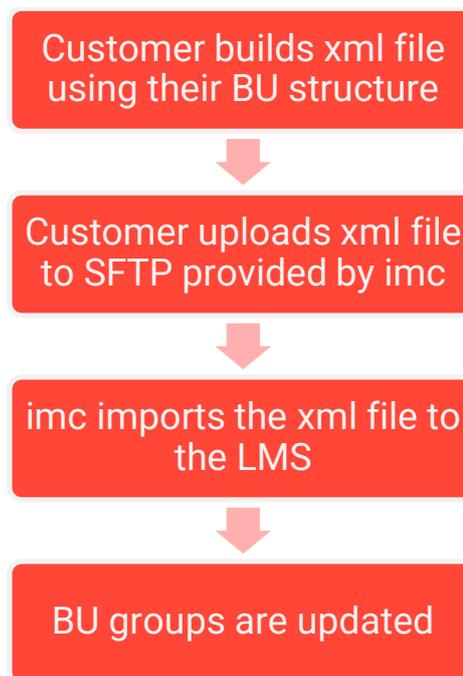
A service description provides clarity and communication by clearly defining what the service is, its scope, and boundaries, ensuring a common understanding among all stakeholders. It specifies the service levels and quality metrics, setting expectations for performance and reliability. Additionally, it details the dependencies and interactions with other services, outlining necessary integrations.

This document contains the procedures to configure a XML Group Import file in the LMS, considering the following aspects:

- **Description of the services to be provided** by the imc project team in the context of a XML Group Import
- **Description of the competences and responsibilities**, which lie partly with imc and partly on the customer's side.
- **Description of the procedure, the process and time dependencies** for a transparent view of the individual steps is possible for all involved people.

Context

This document will guide you through the process of implementing XML Group Import and the imc Learning Suite, including the necessary roles and responsibilities to ensure a successful integration. The process is similar to the csv user import and works as follows:



Description of the Service

This service description applies to the implementation of a XML Group Import to update the organization structure in the system. This is a fast way to update supervisors, deputys or even complete re-organizations or updates of business units. The implementation of a XML Group Import is divided into the following phases:

- Design phase
- Implementation phase
- Roll-out/Close phase

Prerequisites:

SFTP Server: imc provides the the SFTP Server and provides the login details

BU Structure with unique IDs: Customer needs to have a Business Unit (BU) structure with a unique ID for every Business Unit

Cron Job: The “de.imc.clix.tms.businessunit.groupimport.job.XMLGroupImportJob” – CronJob must be added at the cronjobs and defined with the customer as a planned task

Copy Job: Copy Job to copy the XML file from the SFTP server to the customer LMS (PM task of the imc consultant)

Configuration Settings imc LMS: The following settings need to be done and clarified together with the customer in a workshop (CONFIGURATION – IMPORT – XML Group Import):

SETTINGS

VALUE	EXAMPLE
BASE Group	Base Group* ⓘ <input type="text" value="BASE Group"/> ⓘ
Import Folder	Import Folder* ⓘ <input type="text" value="/group/groupimport/"/>
FileName	File name* ⓘ <input type="text" value="bulmport.xml"/>
Scheduler Integration	<input checked="" type="checkbox"/> Scheduler integration ⓘ
Execution Person	Execution Person ⓘ <input type="text" value="imc System Admin"/> ⓘ
Delete Folder content	<input checked="" type="checkbox"/> Delete folder content
Log File Settings	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Log File Settings</p> <p>CSV encoding ⓘ <input type="text" value="UTF-8"/></p> <p>Logfile name pre-fix* ⓘ <input type="text" value="xml_group_log_"/></p> <p>Relative upload path* ⓘ <input type="text" value="/group/groupimport/log/"/></p> <p><input type="checkbox"/> Save as ZIP file ⓘ</p> <p>Field separator <input type="text" value="TAB"/> ▼</p> </div>
Log File Attributes	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Log File Attributes</p> <p><input checked="" type="checkbox"/> Action ⓘ</p> <p><input checked="" type="checkbox"/> Name ⓘ</p> <p><input checked="" type="checkbox"/> Status ⓘ</p> <p><input checked="" type="checkbox"/> Ext ID ⓘ</p> </div>

IMPORT ATTRIBUTES (Default values)

- Type of role
- Group Code
- Description
- Status
- Functions
- Expiration (Default value = empty, Substitution mode = EMPTY)
- Start
- Users (*Note: Substitution mode defines if a value should stay or should be emptied with a new import*)
- Supervisors
- Deputies with access
- Deputies without access

Setup process

Design Phase

The organizational structure of Business Units is used to have a clearer overview of specific User groups. This structure can be used for different purposes. In these structures you can implement the supervisor, deputys and deputys without any rights. The management structure can be mapped across different levels.

In the design phase the structure of the XML file has to be defined.

The following attributes has to be defined:

ATTRIBUT	DEFINITION	EXAMPLE
userAssignmentAttribute	Which personal attribut (unique ID of the user) is used to assign the user to a specific group	<pre><XmlGroupImportData userAssignmentAttribute="EXT_ID_CSV"></pre> <p>Allowed attributes:</p> <ul style="list-style-type: none"> • LOGIN • PERSON_ID • EXT_ID_CSV • EXT_ID_LDAP • EXTERNAL_ID • EXTERNAL_SYSTEM_ID • EXT_SHIB_UID • EXT_SHIB_ENTITY_ID • EMAIL
XmlGroup	Together with different options it is the base of the definition of a group. The options are: <ul style="list-style-type: none"> - "extId" unique ID of the group provided by the customer 	<pre><XmlGroup extId="51004227" typeOfRole="STANDARD" status="ACTIVE" start="2023-11-01" expiration="9999-12-31"></pre>

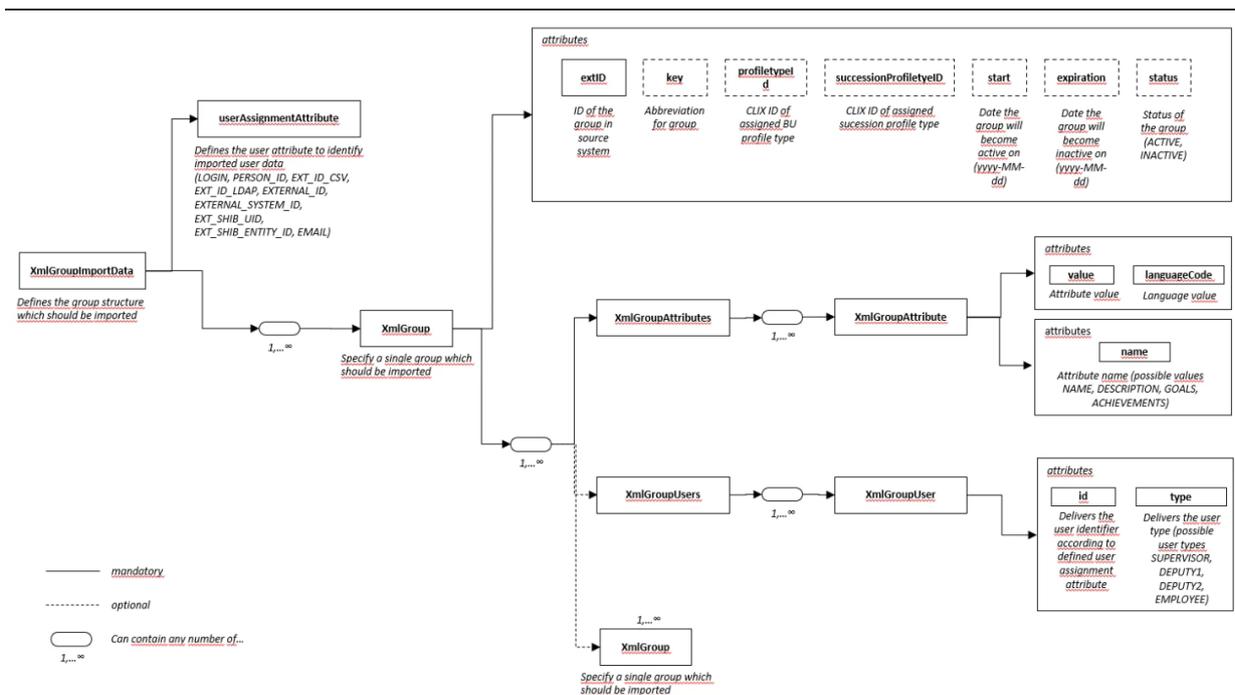
	<ul style="list-style-type: none"> - "typeOfRole" defines if the imported group is a "standard" or a "content admin" group - "status" defines if the group is "active" or "inactive" - "start" defines when a group should be activated or was build in an organization - "expiration" imported groups can automativally be de-activated 	
<p>XmlGroupAttribute</p>	<p>The basic information about the group in connection with the options "name", "languageCode", "value"</p>	<pre><XmlGroupAttribute name="NAME" languageCode="de-DE" value="Zentralfunktion"/> <XmlGroupAttribute name="DESCRIPTION" languageCode="de-DE" value="Beschreibung Zentralfunktion"/></pre>
<p>XmlGroupUser</p>	<p>The attribute is used to assign the users to the groups. Options for this attribut are "type" (with the values "SUPERVISOR", "DEPUTY1", "DEPUTY2", "EMPLOYEE") and "id"</p>	<pre><XmlGroupUser type="SUPERVISOR" id="0815"/> <XmlGroupUser type="DEPUTY1" id="0816"/> <XmlGroupUser type="DEPUTY2" id="0817"/> <XmlGroupUser type="EMPLOYEE" id="0818"/></pre>

```

1  <?xml version='1.0' encoding='utf-8'?>
2  <XmlGroupImportData userAssignmentAttribute='LOGIN'>
3    <!-- Level 0-->
4    <XmlGroup extId='Company' typeOfRole='STANDARD' status='ACTIVE'>
5      <XmlGroupAttributes>
6        <XmlGroupAttribute name='NAME' languageCode='en-GB' value='Departments' />
7        <XmlGroupAttribute name='DESCRIPTION' languageCode='en-GB' value='Main folder for all departments' />
8        <XmlGroupAttribute name='NAME' languageCode='de-DE' value='Abteilungen' />
9        <XmlGroupAttribute name='DESCRIPTION' languageCode='de-DE' value='Hauptordner für alle Abteilungen' />
10     </XmlGroupAttributes>
11     <!-- Level 1-->
12     <XmlGroup extId='Sales' typeOfRole='STANDARD' status='ACTIVE'>
13       <XmlGroupAttributes>
14         <XmlGroupAttribute name='NAME' languageCode='en-GB' value='Sales' />
15         <XmlGroupAttribute name='DESCRIPTION' languageCode='en-GB' value='Main folder for all Sales departments' />
16         <XmlGroupAttribute name='NAME' languageCode='de-DE' value='Vertrieb' />
17         <XmlGroupAttribute name='DESCRIPTION' languageCode='de-DE' value='Hauptordner für alle Vertrieb-Abteilungen' />
18       </XmlGroupAttributes>
19       <XmlGroupUsers>
20         <XmlGroupUser type='SUPERVISOR' id='sales_admin' />
21         <XmlGroupUser type='DEPUTY1' id='sales_deputy' />
22         <XmlGroupUser type='DEPUTY2' id='sales_deputy_wo_clearances' />
23         <XmlGroupUser type='EMPLOYEE' id='sales_employee_1' />
24       </XmlGroupUsers>
25     <!-- Level 2-->
26     <XmlGroup extId='Region DACH' typeOfRole='STANDARD' status='ACTIVE'>
27       <XmlGroupAttributes>
28         <XmlGroupAttribute name='NAME' languageCode='en-GB' value='Regional Sales - D/A/CH' />
29         <XmlGroupAttribute name='DESCRIPTION' languageCode='en-GB' value='Sales Department for DACH' />
30         <XmlGroupAttribute name='NAME' languageCode='es-ES' value='Regional Sales - D/A/CH' />
31         <XmlGroupAttribute name='DESCRIPTION' languageCode='es-ES' value='Vertrieb für DACH' />
32       </XmlGroupAttributes>
33       <XmlGroupUsers>
34         <XmlGroupUser type='SUPERVISOR' id='sales_dach_supervisor' />
35       </XmlGroupUsers>
36     </XmlGroup>

```

To sum up things, here is a schematic in how the XML file needs to be structured and what it can contain:



Implementation phase

After the basic settings are configured and the file is provided by the customer the implementation phase can start. If the customer has a STAGE or DEV system, the test of the file should be done at the STAGE or DEV system which is ideally a new copy of the PROD system.

Note: Please be aware that at the STAGE and DEV system the user date is anonymized and in some cases - when the userAssignmentAttribut is anonymized – the users cannot be assigned to the groups.

1. Test manually: If the BASE GROUP is configured correctly, you can manually import the file with marking the group and import the file manually (“New” – “Import”)
Note: If the wrong group is marked or the base group is not configured correctly at the configuration manager, the “Import” option is not choosable
2. Check the imported groups by checking the name and the IDs
3. Check the assigned users

If everything is working correctly with the new import, update specific values (e.g. rename a group, change the supervisor) and test the update of the BU Import.

When the file is working correctly, the file can be uploaded to the SFTP Server (either manually or via a job from customer side). Now also the automatic update can be tested at the PROD system.

Roll-out / Close phase

During the roll-out phase, if the customer has a STAGE or TEST system with imc, then the same steps as in implementation phase are replicated on the customer’s production system (PROD).

Once the integration has been formally confirmed to be working on the PROD system by the **customer**, the **imc project team** will close the project.

Result of the roll-out/close phase: The XML Group import has been implemented on PROD and the customer confirms the implementation is complete.

Overview of tasks & responsible parties

Tasks	Responsible Party
Define and name Base Group	Customer / imc
Provide example BUImport.xml	imc
Provide SFTP access	imc
Provide BUImport.xml	customer

Change Log

Version	History	Status
1.0	04.11.2024	Review