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CSV User Import

Service Description

imc Learning Suite

October 08, 2024

Preface

The imc Learning Suite (LMS) is a standard product (standard software) which is constantly being extended with further functions & features (Innovation Packages). The LMS offers several user data import possibilities, and this document describes one such service: user import with csv file.

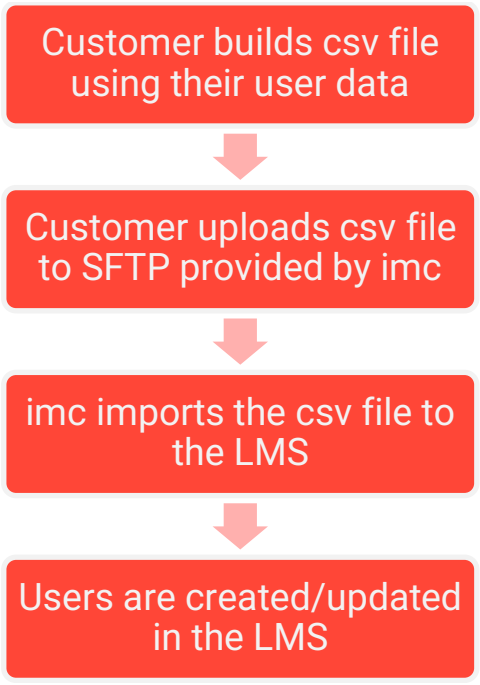
This document contains the procedures to configure a user import with a csv file in the LMS, considering the following aspects:

- **Description of the services to be provided** by the imc project team in the context of a user import with csv file.
- **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

User import with csv file in imc Learning Suite (ILS) allows to create and update users in the LMS. The user import requires a xml file to map import data to personal attributes in the LMS, a csv file with the import data itself and a (optional) xml file for registration rules. In case the import is scheduled to be daily, weekly, or monthly, a cronjob needs to be installed, too.

The process works as follows:



Description of the Service

The user import with csv file allows data exchange between the master data system managed by the customer and the imc Learning Suite (LMS), requiring efforts from both an **imc Consultant** and a **customer IT representative**. The implementation of a csv user import is approached in the following sequential phases by imc:

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

Design phase

The purpose of a user import is to import personal data from a source system to imc Learning Suite. One core task when configuring a user import is to define which personal data should be imported from the source system into imc Learning Suite and to map that import data to personal attributes in the LMS.
In addition, registration rules provide the ability to further process the imported data and use it to e.g., automatically assign users to groups or define clearances for users.

During the design phase, the **imc project team** will create and provide a functional specification[1] to the customer, which includes the following key information for the csv user import:

1. **Custom user profile attributes**
   Once it was agreed with the customer which personal information should be imported from the source system to ILS, the attribute mapping for the user import must be created. The attribute mapping maps the attributes from the source system (csv file) to the respective personal attributes in ILS. In fact, each attribute from the source file may be mapped to one or more than one personal attribute in ILS.
   It must be ensured that for every attribute to be imported from the source file a personal attribute exists in ILS. Personal attributes in ILS must therefore be created before creating the attribute mapping. The attribute mapping itself is defined in an XML format where the attributes form the source file (sourceField) are mapped to the corresponding ILS personal attribute (clixField).

2. **CSV Import Structure**
   The attribute mapping defines the structure of the csv file which will be imported**.** One essential step is to agree on a unique identifier for users. The unique identifier must be part of the user import file and must be mapped to the appropriate external user ID field in ILS (**EXT_ID_CSV**). To create or update users, mandatory personal attributes in the LMS are also required in the csv file. Furthermore, the column separator of the csv file needs to be defined (tabulator, semicolon, comma, or pipe). The encoding of the file needs to be UTF-8 and the file format .csv.
   Note: If two users have the same "unique" identifier in one import (duplicated IDs), both

[1] Based on Standard interface Template - User Import via CSV

users will not be imported and trigger an error. The import continues with the other users whose ID is unique.

3. **Registration rules (OPTIONAL)**
   Registration rules are xml-files that define certain automated processes to be executed when a user profile is stored (e.g., creation or update of a user via import). They are used to automate procedures regarding the update of user information, the update of group assignments or clearances of users.

Result of the design phase: The functional specification document created by imc and the customer's approval for implementation is available.

Implementation phase

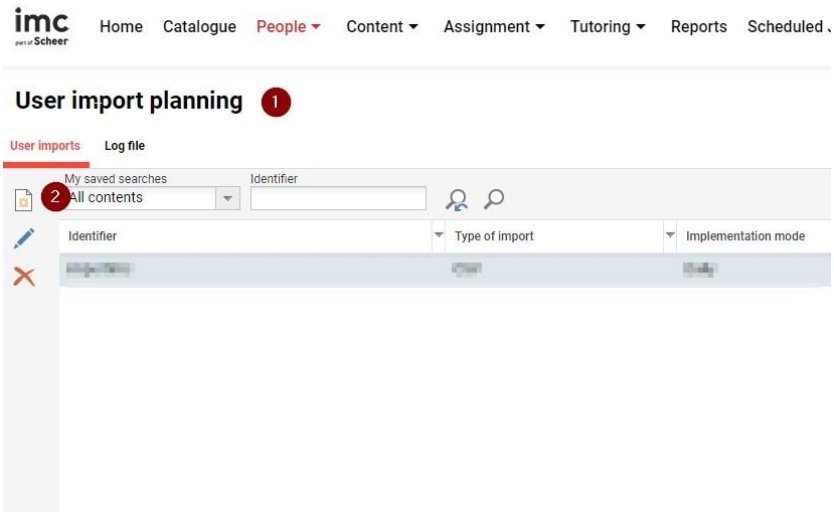
During the implementation phase, configurations will be done on the customer's LMS. If the customer has a STAGE or TEST system with imc, then the implementation will first be done on that system. Otherwise, configuration is done directly on the customer's production system (PROD).

Note: Personal attributes are always created on PROD. Afterwards, the database of PROD is copied to STAGE / TEST such that personal attributes must only be created once.

User import planning in ILS allows the configuration of the user import in the LMS. The user import requires a xml file to map import data to user attributes in the LMS, the .csv-file with the import data and an xml file for registration rules.

1. The **attribute mapping** defines the structure of the csv file to be imported and maps the column names of the csv file to personal attributes in ILS (file name: **mapping.xml**)
2. The **csv user import file** with all user data (file name: **users.csv**)
3. **Registration rules** can be added and are stored either on client-level (if multiClientContext is activated) or under Configuration (file name: **rules.xml**)

Quick guide on how to use user import planning:
Log in to your system with an admin account and open the menu User Import Planning **(1)** and create a new entry **(2)**.



Now you must store all the information for the import:

(3) Identifier

(4) Client for the import

(5) The attribute mapping must be uploaded here

(6) Name of the CSV import file

(7) Field separator in the CSV file

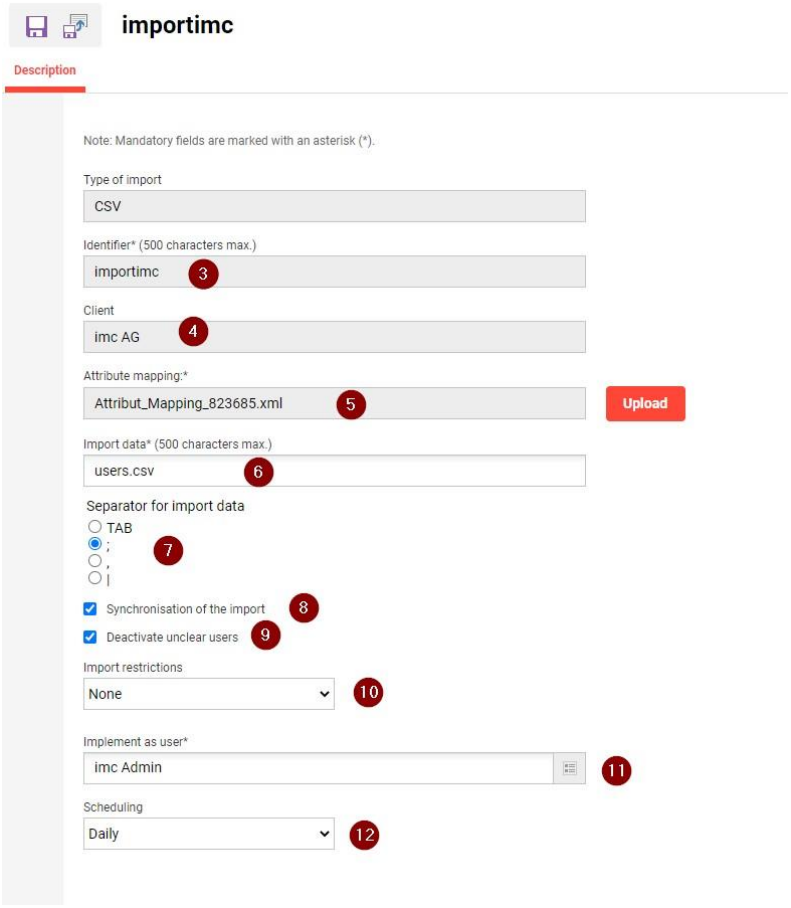
(8) Synchronisation of the import (if a user is no longer included in the import file, it will be set to deregistered)

(9) Deactivate non-unique users (if a user is included twice, it will be set to deregistered)

(10) Import restrictions (should a user only be created or also updated)

(11) System user that performs the import (may not be deleted)

(12) Scheduling (Manually, Daily, Weekly, ...)



A new directory is now created on the LMS server under **data\person\personimport\identifier\source** and the CSV file must be stored in that directory to be imported automatically. Depending on the configuration of the user import job, the import is carried out at regular intervals. The corresponding cronjob with the name **UserImport** can be configured via the Scheduled Jobs menu.

During the implementation phase, imc will test the user import using a csv file with the agreed structure provided by the customer containing dummy data.

The **customer IT representative** will then be responsible for:

1. Creating a csv file from the master data system with the agreed csv file structure
2. Uploading the csv file to the SFTP server on a regular basis

The **imc project team** will provide all **credentials** that are required to build a **SFTP server** connection:

- Server: {{ Server-URL }} {{ PORT }}
- Directory: {{ PATH TO UPLOAD FOLDER }}
- User name
- Password

Result of the implementation phase: The csv user import has been implemented by imc and the customer has successfully configured the SFTP server connection to upload the csv file.

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 csv user import has been implemented on PROD and the customer confirms the implementation is complete.

[End of document]