



Bulk Importing Quota Users from a CSV file

Overview

The Account Import feature enables one to easily import accounts using a comma-separated text file into pre-determined User Classes. The imported data is then used to create GoPrint administrators and Quota accounts.

- ▶ *Required information:* LoginID, FirstName, LastName
- ▶ *Optional information:* email address, password, prior account balance
- ▶ *Requirements:* the proper User Class must first be determined

CSV Fields and Format

Since the user is given the option to set up which fields are imported based on the column title information, the system can be very flexible at importing various files. There are two main requirements for the import file contents;

- ▶ Data should be separated by a comma per element (e.g. Firstname,Lastname,Address,City,State,Zip)
- ▶ The first line should be column titles and will not be imported as data.

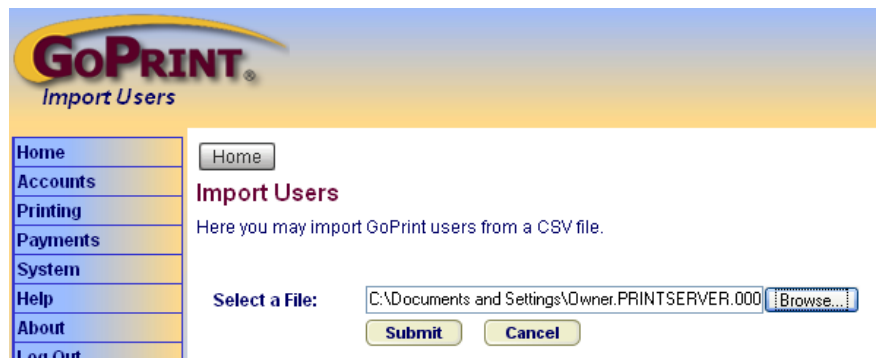
Sample:

```
LoginID,First Name,Last Name,EMAIL,PASSWORD,BALANCE,,  
FSMITH,FRED,SMITH,FRED@COX.NET,GOPRINT,4,,  
test,test,goprint,test@gmail.com,goprint,20,,
```

Step 1 – Upload the CSV file

After selecting the *Accounts/Import Users* option from the left-hand border menu, a field entitled **Select a File:** prompting for a filename will display. Use the *Browse* button

1. Accounts Import Users
2. Browse for the CSV file and click Submit





It is strongly recommended that the current database be backed up before performing the account import feature. The default import method, which is a selection on this screen, is *All Entries* and it will overwrite existing accounts without confirmation if they have a matching Account ID!

Choosing Import Data

After choosing a file to import, a screen used for 'lining up' the import data is displayed. There are two parts to be aware of:

- ▶ The top half displays the first ten records of the file that was chosen (the first row of the import file is assumed to be the column titles). This half of the screen is a reference view to be used for setting up the import records.
- ▶ The bottom half of the screen is where user interaction is needed. On the left side is a list of the fields that the GoPrint GS-4 system needs for each account record. It will be necessary to use the reference view above to correctly match up the fields as closely as possible with the GoPrint GS-4 system field names.

Import

Use this drop-down box to select *All Entries* or *New Entries Only*.

- ▶ **All Entries**
 - Import every line (not including the header line 1). While using this option to import, if an Account ID being imported is identical to an already existing Account ID in the GoPrint GS-4 system, the account in the GoPrint GS-4 system **will be overwritten without confirmation**.
- ▶ **New Entries**
 - Only will only import records that don't already exist within the system based on Account ID.

Although it is advisable to match as many attributes as possible, only the Account ID field is needed for the import to succeed.

Scheduled Quota Option

Use this drop-down box to select scheduled quota option.

- ▶ **Run scheduled quotas for new users**
 - New User will receive any Scheduled Quotas from Purses associated with the Class the new user is added to.
- ▶ **Suppress scheduled quotas for new users**
 - Option will suppress Scheduled Quotas for any new users imported.

The Default PIN will be used when either the user's record contains no PIN or no PIN field has been set. Users with no PIN will not be able to log into the system. The Default Reference Number will be used when either the user's record contains no Reference Number or no Reference Number field has been set.

To start importing, click the Import button once the proper attributes have been matched up with the field names.

A properly formatted CSV file outputs a list of its contents:

Home > Import Users

Import Users

Sample CSV Data

LoginID	First Name	Last Name	EMAIL	PASSWORD	BALANCE		
FSMITH	FRED	SMITH	FRED@COX.NET	GOPRINT	4		
test	test	goprint	test@gmail.com	goprint	20		
sherry	sherry	anderson			5		
12345	terry	miller	terry@goprint.com	goprint	50		

Import All Entries ▾

Step 2 – Match the User Attributes with the CSV fields

User Attribute	Field
Account ID	(None) ▾
First Name	(None) ▾
Last Name	LoginID First Name Last Name
E-Mail	EMAIL PASSWORD BALANCE
PIN	
Default PIN	
Reference Number	(None) ▾
Default Reference Number	
Class	(None) ▾
Default Class	(None) ▾
Balance	(None) ▾

1. From the **Field** drop down menu associate the user attribute from the CSV field to the corresponding GoPrint attribute.
2. If PIN/Passwords are not available for import, create a default Pin for all users and enable the option to require users to change PIN at first login
3. Assign Users to the desired Default Class



Step 3 – Confirm Import

Click Accounts- Manager Users

1. Select Search to return a list of all users fields or click Search to return results for all users
2. Check the GoPrint Quota user to ensure they have been assigned to the proper class and all desired user data successfully imported.

Manage Users Account Search Results

Account Search

This is the Account Search page. Here you may search for accounts and perform various tasks any selected ones.

The screenshot shows the 'Account Search' form with the following fields and controls:

- Login Name**: Text input field
- Last Name**: Text input field
- Ref Num**: Text input field
- Records Per Page**: Dropdown menu set to 100
- Active / Inactive**: Dropdown menu set to Both
- Class**: Dropdown menu set to Any Class
- First Name**: Text input field
- Email**: Text input field
- Ina**: Text input field (partially visible)

Buttons: Search, Clear, Search Directories. A callout box with a red arrow points to the Search button, containing the text: "Click Search to return a list of all users!".

Found 7 Accounts

Note: Results are cached between searches.

<input type="checkbox"/>	Account ID	Full Name	Email	Ref No	Status	Last Updated
<input type="checkbox"/>	BFRANKLIN	Franklin, Bill			Active	04/06/2007
<input type="checkbox"/>	BJOHNSON	Johnson, Brent			Active	04/06/2007
<input type="checkbox"/>	JJACKSON	Jackson, Jim			Active	04/06/2007
<input type="checkbox"/>	JSMITH	Smith, Jay			Active	04/06/2007
<input type="checkbox"/>	RED	Jones, Red			Active	04/06/2007
<input type="checkbox"/>	WCLARK	Clark, Walt			Active	04/06/2007
<input type="checkbox"/>	testuser	goprintuser, test	test@goprint.com		Active	04/06/2007

Set Quota Accounts Inactive

To set individual or a subset of accounts to Inactive, manually check the account then select the **Misc. Action** drop down menu then select to Make Inactive then select to RUN COMMAND.

Note: currently scripting this task is not available.

<input type="checkbox"/>, Angela
<input checked="" type="checkbox"/>	ID091	Lawrimore Title, Lawrimore Title (Angela)
<input checked="" type="checkbox"/>	ID092	Legal Dept., Legal Dept.
<input checked="" type="checkbox"/>	ID093	Lege
<input checked="" type="checkbox"/>	ID094	LePr
<input checked="" type="checkbox"/>	ID095	Lofto
<input checked="" type="checkbox"/>	ID096	Lowcountry title, Lowcountry Title
<input type="checkbox"/>	ID097	Lowcountry title, Lowcountry Title (Laura)

Manually select each user account

Change Account Attributes

Add to Class (pick one)

Misc. Action (pick one)

Adjust Balance

Adjust Purse

Amount

- (pick one)
- Make Active
- Make Inactive
- Allow Credit
- Hold Credit

Option #2 – Individual Quota Accounts

You can manually set an Active to Active and Inactive under each users Quota Profile

	Account	Member Of	
	Mobile	Transactions	

Account

Account ID

First Name

Last Name

Email

Card No

New Password

Verify Password

No password has been set.

Reference No

Active

Credit Hold

Deleting User Accounts

Quota user accounts cannot be deleted when an existing balance exists. To delete an account the balance must be adjusted to 0.0. To do so,

1. Select the Purse from the Adjust Balance section
2. *Amount*: Enter a negative amount equal to the users current balance
3. *Other Reason*: enter a single word describing the reason
4. Select Adjust Balance button

[Home](#) | [Transactions](#) | [Login History](#)

Member Of

Class Membership

✕ Default User Class

(pick one) ▼ Add to Class

Current Purses

Purse Name	Balance	Credit Limit Remaining
Default User Class - Quota funds	50.00	0.00
Default User Class - CBORD FUNDS	---	---
Default User Class - Allowance	0.00	0.00
Default User Class - ATRIUM (Multiplan)	---	---
Default User Class - Value Card	---	---

Credit is currently not allowed in the system.

Adjust Balance

Purse Default User Class - Quota funds ▲
Default User Class - Allowance ▼

Amount -50.00

Adjust Reason Other ▼

Other Reason not student

Payment Type Cash ▼

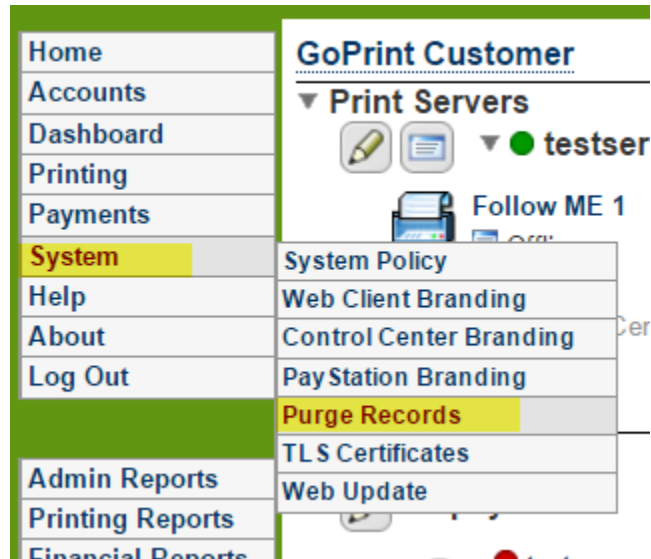
eMail Receipt

Adjust Balance



Purge ALL Users

System – Purge Records



Note: Non-Admin Users will purge ALL users

Purge Data

You may purge data that is no longer needed.
The selected types of data will be purged up until the provided date.

Purge data prior to

- Purge **ALL Users** → Non-Admin Users who have not logged in since the date above.
 Print Jobs recorded prior to the date above.
 Transactions posted prior to the date above.
Inactive Users → All [3] Users marked inactive.