Company: Realizeit

Document Title: Data Import

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Contents

1. Introduction

This document describes how to create and use a data import operation in Realizeit to import a list of new users into Realizeit. This includes; creating the data import file, configuring and processing the data import file in Realizeit.

2. Creating the Data Import File

First, a data import file needs to be created. This contains the list of new user to be created in Realizeit.

- Open a new Excel file
- Each column will represent a record for the user. No headers should be added in the upload file. In this example, the following columns represent:
  - Column A: Username
  - Column B: Password (only required if a specific password is necessary)
  - Column C: Forename
  - Column D: Surname
  - Column E: Organization
  - Column F: Group
  - Column G: Aspects (only relevant if "Test students" need to be provided the *Cheat at questions* functionality or if an instructor user is being created.)

- In column A, enter *stu1x* in cell A1, *stu2x* in cell A2, *stu3x* in cell A3 and *stu4x* in cell A4 as the usernames.
- Provide a password for each user in column B.
  - In this example the username is also specified as the password e.g. stu1x
Note: if a password is not specified the system will provide a password.
- Column C will represent the user's forename. Going down the column type e.g *James, Gill, Conor and Amy.*
- Column D will represent the user's surname. Going down the column type, *Pope, Thompson, Green, Roberts.*
- Column E will represent the organization(s) the user will be allocated to, type *Studentx Organization* for each user.
- Column F will represent the group(s) the user will be allocated to, type *Group 2* for each user.
- Column G will represent the aspects that should be applied to the user.
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  - A student user can be provided with the following aspects:
    - eMyData
    - eCheat (this is only used for "Test students" to allow the user to *Cheat at questions*).
  - An Instructor user can be provided with the following aspects:
    - eCurriculumEditing
    - eObjectives
    - eGroupings
    - eMyData
    - eAuthoring

- eContent
- eCheat
- eSalesData
  - In column G enter *eMyData, eCheat* as the two aspects for each user.
  - Save the file as type CSV (Comma Delimited) to your computer.

	A	B	C	D	E	F	G
1	stu1x	stu1x	James	Pope	Studentx Organization	Group 2	eMyData, eCheat
2	stu2x	stu2x	Gill	Thompson	Studentx Organization	Group 2	eMyData, eCheat
3	stu3x	stu3x	Conor	Green	Studentx Organization	Group 2	eMyData, eCheat
4	stu4x	stu4x	Amy	Roberts	Studentx Organization	Group 2	eMyData, eCheat

3. Data Import Operation

3.1. Creating a data import operation
- On login, go to the user menu dropdown beside the user name.
  - To access the data import operation option, click on Administration >Data Import Operation.
- Click on *New Import Operation*.
- In the Item area, provide a *name* for the import operation.
- Click *Save.*

3.2. Providing the data file
- From the Data import operation page, locate the Data Import operation and click on *View.*
- Scroll down to Source of Data and click *New Date Source.*
- Create the source details:
  - Provide a name.
  - Upload File: Click on *Choose File* and browse for the csv file.
    - Note: If the file is on a server, enter the file name in the *File on server* field.
  - Status: Select *Ready to Import.*
  - Data Type: Select *Person* as we will be importing users.
  - Format: Select *Comma Separator* as this is the file type we are importing.
- Click *Save.*
- Click on *Save changes*.

3.3. Configuring the source data
- View the Data import operation.
- Scroll down to Sources of Data and click on *Edit* next to the source name. Scroll down to Rules and click on *New Rule.*
- On the *New Rule* page, configure how the system should read the imported csv file.

Note: View the csv file; notice the data in the columns as follows; Username, Password, Forename, Surname, Organizations, Group, Aspects.

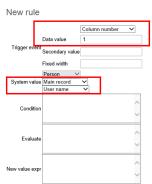|	A	B	C	D	E	F	G
1	stu1x	stu1x	James	Pope	Studentx Organization	Group 2	eMyData, eCheat
2	stu2x	stu2x	Gill	Thompson	Studentx Organization	Group 2	eMyData, eCheat
3	stu3x	stu3x	Conor	Green	Studentx Organization	Group 2	eMyData, eCheat
4	stu4x	stu4x	Amy	Roberts	Studentx Organization	Group 2	eMyData, eCheat

To do this:
- Create the rule for column A (username):
  - From the first drop down select *Column Number.*
  - In the Data Value field enter "1" (this represents column A).
  - There are two drop downs next to System Value:

- Dropdown 1, select the record type as *Main Record.*

NOTE:
  - Main Record – use this option, when column contains a username, fore/surname, aspects and password.
  - Organization – use this option, when column is identifying the Realizeit organization.
  - Grouping –use this option, when column is identifying the Realizeit group.

- Dropdown 2, select the item description associated with the information in the column; select *Username.*

- Click *Save.*
- Continue creating new rules for column B – G choosing the appropriate options as described.
- Click on *New Rule*. Create as follows:

Column B (Password)
  - Select *Column Number*
  - Data Value enter *2*
  - System value select *Main Record – Password*
  - Click *Save*

Column C (Forename)
- o Select *Column Number*
- o Data Value enter *3*
- o System value select *Main Record – Forename1*
- o Click *Save*

Column D (Surname)
- o Select *Column Number*
- o Data Value enter *4*
- o System value select *Main Record – Surname*
- o Click *Save*

Column E (Organization)
- o Select *Column Number*
- o Data Value enter *5*
- o System value select *Organizations – Name*
- o Click *Save*

Column F (Group)
- o Select *Column Number*
- o Data Value enter *6*
- o System value select *Groupings – Name*
- o Click *Save*

Column G (Organization)
- o Select *Column Number*
- o Data Value enter *7*
- o System value select *Main Record – Aspects*
- o Click *Save*
- All rules have been configured.
  - o Click on *Discard* (Source page).
  - o Click on *Discard changes* (Data Operation page).

4. Import
To import the file, go to the Data Import Operations page.
- Click on *Import* beside the Data import operation.
- Click on *Start.*
- When the operation is complete the Actions area will describe the operations which have been completed.
  - o If a password has not been specified in the csv. File then the password the system has allocated will be presented here. Therefore, take note of the passwords.
- Verify the new users, by going to the user menu dropdown beside your user name.
  - o Select Organization and People > People.