

User Importer 3.3 Administration

Overview

The *User Importer* add-on allows you to quickly and easily manage hundreds or thousands of WebEOC user accounts.

The importer allows you to download a spreadsheet, enter all relevant user account information, and then import all of the accounts into WebEOC at one time.

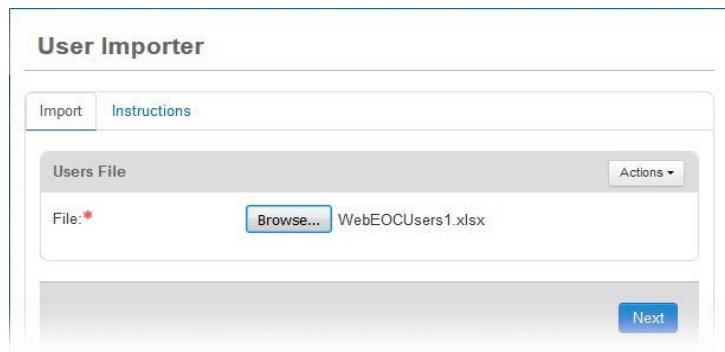
Compatibility

Versions 8.3 and later

Core	+	Available to add
Professional	+	Available to add
Enterprise	+	Available to add

Import Template

The User Importer add-on includes a template that you can use for quick and easy addition, modification, and removal of WebEOC users. The header row of the template shows the user accounts fields that are supported. You can use Microsoft® Excel® or another spreadsheet program to open and work with the spreadsheet template.



About the Template

Note the following about the downloadable template and the columns (fields) included in it:

Required Data: The imported spreadsheet does not need to include all the columns that appear in the template. At a minimum, it must contain columns and the associated data for the following required fields: **User Name**, **Password**, **Account Type**, and **Primary Email**.

	A	B	C	D	E	F	G
1	User Name	Password	Account Type	Account Disabled	Change Password At Next Login	Allow Session To Expire	Primary Email
2							
3							
4							
5							
6							
7							

Note: You are only required to include a **Password** value for new user records.

Columns you do not include in the spreadsheet do not affect any existing data in WebEOC. This helps ensure you update only the user information you want to change.

Updating Records: When updating existing user accounts, if you leave the password field blank, the user's password is not changed. This is especially useful when you want to update user information without changing a user's unique password.

Expiration Date: A key use case for importing users is setting up temporary staff for a response or exercise. The spreadsheet includes the **Expiration Date** field so that you can set up these user accounts to automatically expire at an appropriate time.

Account Removal: You can use the template to remove user accounts as well. In these cases, include the **User Name** for each account you want to remove, and enter **TRUE** in the **Remove** column for that account. You do not need to include any other fields or data for these accounts.

To Download the Template

1. From the *Admin* window, go to **Plugins: User Importer**.
2. In the **Import** tab, open the **Actions** menu and click **Download Template**, or go to the **Instructions** tab and click the link toward the top.
3. Open or save the file.

Instructions

Once you've downloaded the template, we recommend you take a look at the **Instructions** tab in the *User Importer* page of the *Admin* window. The tab includes details about each column/field in the template. Required fields are marked with an asterisk.

User Importer

Import

Instructions

Download [UserImporterTemplate.xlsx](#) template file.
The following table provides descriptions of each input file field. Fields marked with an asterisk (*) are required.

Field name	Possible values	Max length	Description
User Name*	Any	100	User name used to log in to WebEOC
Password*	Any	150	User password used to log in to WebEOC. Password field is required only for new users. Leaving it blank for existing users will prevent password changing during import. <i>Note: Passwords are case sensitive.</i>
Account Type*	User, Full Administrator, Service, Service as Administrator	N/A	Type of user account
Account Disabled	True, False	N/A	Indicates whether the account will be disabled after import

Building Data

About User Accounts

A WebEOC user account is automatically created for each new user listed in the spreadsheet. The new account includes the details from the spreadsheet, which can include the user's email address, password, and permission settings.

You can also update existing user accounts using the spreadsheet. If a user listed in the spreadsheet already exists in WebEOC, the import process updates the user's information.

You can control the permissions of many users at once by including in the spreadsheet the WebEOC position assignments for each user. Separate multiple positions with a comma.

To Build Data in the Spreadsheet

To build data in the spreadsheet, simply enter user account information in each row of the spreadsheet. Save it as a Microsoft Excel file (with an .xlsx extension).

	A	B	C	D	E	F	G
1	User Name	Password	Account Type	Account Disabled	Change Password At Next Login	Allow Session To Expire	Primary Email
2	agreene	Password1	Full Administrator	FALSE	FALSE	FALSE	agreene@mailing.com
3	cgrimes	Password1	User	FALSE	FALSE	FALSE	cgrimes@mailing.com
4	mstaples	Password1	User	FALSE	FALSE	FALSE	mstaples@mailing.com
5	escoll	Password1	User	FALSE	FALSE	FALSE	escoll@mailing.com

For the users you want to remove from your WebEOC system, enter only the **User Name** and enter **TRUE** in the **Remove** column.

Note: You cannot remove the user account for the user who is currently logged in to the system.

Important: You cannot undo user removal. To ensure you are removing only the appropriate user accounts, pay special attention to the validation results; double-check the *Users to be removed* section to make sure it contains only those users you want to remove.

Import Process

User information can be re-imported as many times as necessary.

To Import or Remove Users

1. From the *Admin* window, go to **Plugins: User Importer**.
2. From the **Import** tab, click **Browse** or **Choose File**.
3. Locate, select, and open the completed template. The name of the file appears next to the **Browse** or **Choose File** button.
4. Click **Next**. The **Import** tab shows the users to be added, updated, or removed and any errors found in the input file.

5. Click **Confirm**. If the import process encounters data errors in the spreadsheet, you can correct them. Simply cancel the import, fix the issues, and re-import the revised spreadsheet. Only rows without errors are processed when you click **Confirm**.

Import Errors

Errors that occur during import are usually related to validating the data. For example, you may have:

- Included a position that does not already exist in the system.
- Used an invalid email format.
- Marked the currently logged in user for removal.

The error indicates which row or column contains the invalid data and a brief description of the error encountered.

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