

# Check list of automatic user master data adjustment

To get a smooth process of the automatic user master data adjustment we need your support.  
If you got questions feel free to contact us.

*Please fill out this document carefully and send it to your personal project manager of the Magh and Boppert GmbH.*

*Many thanks for your support.*

## Information in the CSV file

<p><b>What is the name of the CSV table?</b></p> <p>It's necessary for the automated process that the file is always named the same, this means there is no time stamp or similar in the name.</p>	
<p><b>At what time or on what days should the automated adjustment be determined?</b></p> <p>The import is processed one time in the night by standard.</p>	
<p><b>Login</b></p> <p>The users are identified within Avendoo® by the field Login. Thus that field has to be unique.</p> <p>Mostly it's the e-mail address, the personnel numer or a name.</p>	

## *User data fields*

### Mandatory fields

login, firstname, lastname, preferred\_language, email (can be changed to optional)

### OU - organizational unit

The OU is used for the automatic assignment of the employees to their superior or team leader.

If you got further question about the structure of the OU feel free to contact your project manager.

**Important note:** If a superior gets automatically a team leader so this team leader is always permitted to the whole OU of the employee on whom he/she is stored as superior.

This means that employees with different superiors have to have a different value in the OU.

**Hint:** If this isn't clear by the hierarchic structure of the OUs you can add the user name of the superior or the name of the employee to the OU.

The OU can also be used for the course assignment via the rules on participants.

### Definition of group, division and region

Free text fields to work more efficient with rules on participants later on

# Parameters of the REST API

## Internal information for your project manager

This information is required to process the master data adjustment at your option.

( (usergroup) = parameter of the API)

Please set a check mark at one of the options and fill out the text fields if required.

<p><b>To which client should the users be imported?</b> (userGroup)</p> <p><i>Please note your favored client in the right column.</i></p>	
<p><b>Should the password sent to the user via e-mail?</b></p> <p><i>Please set a check mark if the password should be sent automatically to the user via e-mail.</i></p> <p><b>Warning:</b> This is be done directly on creating the user account at the moment of the import.</p>	<p><b>Password via e-mail</b> (sendPasswordPerMail)</p>
<p><b>Should the user change the password after the first login?</b></p> <p><i>Please set a check mark if the user should get the ability to change the password by him/herself after the first login.</i></p>	<p><b>Change password after the first login</b> (changePasswordAfterLogin)</p>

**How should the password be generated?**  
(passwordGenerationOption)

*Please select how the password should be generated.*

**User name = password**

for example login=password

mmuster-u = mmuster-u

**Random password**

A random password will be generated by the configuration in the client.

**Forgotten password function (only in combination with the random password)**

Each user has to use the Forgotten password function first. Each user has to get an e-mail address to which Avendoo® sends the Forgotten password e-mail.

**Note:** A random password is always sent first in standard.

**What happens to the users who are not any longer in the CSV file?**

(userImportDeleteOption)

**Only valid for inactive users:**

**userImportAnonymizeOption** = 0 (not anonymizing) or x>0 (anonymizing after x days)

To anonymize means that the user data regarding login, first name, last name, personnel number and password will be anonymized. The following data can remain: client, OU, region, division, group, company, language, entry date, deletion date and expiration date. The other data will be deleted.

**userImportPermanentDeleteOption** = 0 (not to delete permanently) or x>0 (delete permanently after x days)

The effects of the user status "Permanently deleted" to deletion date, expiration date, reports, training inventory, restorage, filter in the user management, participant management of the event date and the course activation, community posts, forum posts, private messages and course announcement (participant list) you see in this table of the online help:  
[https://help.avendoo.de/en/author-backend/user-management#User\\_status](https://help.avendoo.de/en/author-backend/user-management#User_status)

*Note: Users marked as deleted can be restored with your whole training inventory. But there's no guarantee that all learning status and event date registrations can be restored.*

*Avendoo® also got data for users who are marked as deleted (otherwise there couldn't be a restorage). But regarding data protection the user accounts have to be manually and permanently deleted after a certain time.*

You got an overview what happened to the user on single options in the online help:

[https://help.avendoo.de/en/author-backend/user-management#Information\\_about\\_the\\_API\\_User\\_import](https://help.avendoo.de/en/author-backend/user-management#Information_about_the_API_User_import)

**Users have no change**

**Users are set to inactive**

**Users are marked as deleted**

**Users are permanently deleted**

(number of days)

(number of days)

<p><b>Which fields (columns) should be ignored in a re-import?</b> (userImportIgnoreForUpdateFieldsOption)</p> <p>This data is only set on creating an account and can be manually adjusted then in Avendoo®. If there are change in the source system these changes cannot be considered.</p> <p><i>Please use the text field on the right side to list the fields (columns) which should be ignored before the import.</i></p>	
<p><b>How should the default login mechanism be configured?</b> (loginMechanismus)</p> <p>The default login mechanism defines how the user can login.</p> <p><b>Note:</b> This is only relevant for systems in which SSO is possible.</p>	<p><b>Avendoo® and SSO</b> <b>Only Avendoo®</b> <b>Only SSO</b></p>
<p><b>Which personal data can the user manage and see by him/herself?</b> (userImportField9Value)</p> <p>This area can be configured in the user management to define which fields in the personal data of the user profile should be seen and can be edited if required.</p> <p>Note: There's only one user profile per import selectable.</p>	<p><b>Importpw (standard)</b> The users are only allowed to change the password under "My data".</p> <p><b>Import</b> The users are not allowed to make changes under "My data".</p> <p><b>Importall</b> The users are allowed to change all data under "My data".</p> <p><b>Own adjustment</b> You can adjust individually in the user management "User profile".</p>
<p><b>Which minimum number should be defined for the automatic user data adjustment?</b> Minimum number: (minRows)</p>	

**Example:** If you got 9,500 users there should be 9,000 users at minimum for the adjustment in the import file on a regular basis. Otherwise the import will not be processed.

*Please note the number of the users at minimum in the column on the right side.*

## Further notes

- **Which encoding should be used by standard?**

Encoding: (userImportCsvCharEncoding)

The encoding UTF-8 is standard.

Alternatively available: ISO-8859-1

- **Which delimiter is used in the CSV file?**

Table delimiter: (userImportCsvSeparator)

The semicolon (;) is used for separating the information.

- **Which function got the permission groups?**

Permission groups: (standardPermissionGroup)

Which permission group should be set in the import by standard?

**Note:** *Please speak with your project manager about creating the permission groups.*