

Import Users Template Explanation

Notes:

- Items in the Required/Optional columns are bold and italicized if the values are different for the template and the system.
- In the Description/Validation column, “Create” refers to what will happen when you are importing user records to create new users. “Update” refers to what will happen when you are importing user records to update users that already exist in the system.
- If any information that is being added to the template has *leading zeros (such as organization IDs or alternate IDs that start with the number zero)*, then you need to use an application that supports the use of leading zeros in CSV files (Microsoft® Excel does not). If you try to save your import users template file in Excel in CSV format, then any leading zeros that are present will be removed (including if you set the cell format to "text" to try to make the text remain exactly as entered, Excel will remove the zeros when you save to the required CSV format).
- See the Reasons for Failure document (ML-BASE-2011.2.3-ImportUsers-FailureReasons.pdf) for information about messages that display if data fails validation. If a field has more than one type of validation, then a separate failure reason will display for each type of validation.
- It is recommended that you use the same date format for all dates used in the template. If you use more than one date format, then the months and days in the date may unintentionally be reversed.

	Field	Database column (USR_)	Required/Optional in the template	Required/Optional in the system	Default Value	Description/Validation
	Unique ID					
1.	Alternate_User_ID	GLAIT_ALTERNATE_ID column in GLOBAL_ALTERNATE_ID_TRACKING	<i>Required</i>	<i>Optional</i>		<p>Client-specific unique ID for user identification.</p> <p>Alternate User ID is required and must be unique.</p> <p>The character limit is 50. Can consist of any combination of letters, numbers, or special characters, and blank spaces are allowed.</p> <p>Updates are based on the Alternate User ID column in the template. The system attempts to find a match for the Alternate User ID in the Alternate User ID column in the LMS_USERS table. If there's no match, the system then checks the User ID table. If system finds no match in the Alternate User ID or User ID columns in the LMS_USERS table, a new user record is created. If the system does find a match, the user record is updated.</p>
	Login					
2.	Login_ID	LOGIN_ID	Required	Required		<p>Login ID must meet validation standards, otherwise record will fail.</p> <ul style="list-style-type: none"> • Password must be in plain text. • No blank spaces allowed. • Length between 4-20 characters. • Can consist of any combination of letters, numbers, or the following special characters: @, #, [, ^, \$, ., , ?, *, +, (,),], {, }, and \.

	Field	Database column (USR_)	Required/ Optional in the template	Required/ Optional in the system	Default Value	Description/Validation
						<p>Create: Will fail if blank. Will fail if Login ID is not unique.</p> <p>Update: Will fail if blank. Will fail if Login ID is not unique.</p> <p>Actions: If Login ID changes, user is sent email.</p>
3.	Password	PASSWORD	<i>Optional</i>	<i>Required</i>		<p>Create: If password for a user is blank in import file, then a temporary password is randomly generated for the user. If password is included in the import file, then the value is not validated, and the user password field is blank upon import due to security reasons (password cannot be encrypted due to technical feasibility).</p> <p>Update: This field is ignored when a user is being updated.</p> <p>For users without an email address, password communication happens outside the system.</p> <p>Action: If a password is generated or saved, the temporary password email is sent to the user.</p>
Contact						
4.	First_Name	FIRST_NAME	Required	Required		<p>Create: Will fail if First Name is blank. The character limit is 50.</p> <p>Update: Will fail if First Name is blank. The character limit is 50.</p>
5.	Last_Name	LAST_NAME	Required	Required		<p>Create: Will fail if Last Name is blank. The character limit is 50.</p> <p>Update: Will fail if Last Name is blank. The character limit is 50.</p>
6.	Email_Address	EMAIL_ADDRESS	Conditional	Conditional		<p>Email address, if entered, must meet validation standards, otherwise record will fail.</p> <ul style="list-style-type: none"> • The character limit is 255. • Must include one @ and one period (.). • Can include alphanumeric characters (a-z, A-Z, 0-9) plus underscore (_), dash (-), period (.), and apostrophe ('). • Each email address must be unique in the system;

	Field	Database column (USR_)	Required/ Optional in the template	Required/ Optional in the system	Default Value	Description/Validation
						<p>duplicates are not permitted.</p> <ul style="list-style-type: none"> If an email address is required (configuration option), it must be entered. Will fail if above validation standards are not followed. <p>Whether field is required or optional depends on the value of RequireEmailAddress (true or false).</p> <p>If an email address is entered, it must be unique.</p> <p>Create: Will fail if email address is required and the value is blank. Will fail if email address is not unique.</p> <p>Update: Will fail if email address is required and the value is blank. Will fail if email address is not unique.</p>
7.	Middle_Name	MIDDLE_NAME	Optional	Optional		The character limit is 50.
8.	Work_Phone	WORK_PHONE	Optional	Optional		<p>Create: Will fail if greater than 20 characters.</p> <p>Update: Will fail if greater than 20 characters.</p>
9.	Work_Phone_Extension	WORK_PHONE_EXT	Optional	Optional		<p>Create: Will fail if greater than 10 numbers.</p> <p>Update: Will fail if greater than 10 numbers.</p>
10.	Home_Phone	HOME_PHONE	Optional	Optional		<p>Create: Will fail if greater than 20 characters.</p> <p>Update: Will fail if greater than 20 characters.</p>
11.	Mobile_Phone	MOBILE_PHONE	Optional	Optional		<p>Create: Will fail if greater than 20 characters.</p> <p>Update: Will fail if greater than 20 characters.</p>
12.	Fax	FAX	Optional	Optional		<p>Create: Will fail if greater than 20 characters.</p> <p>Update: Will fail if greater than 20 characters.</p>
13.	Address	STREET_ADDR	Optional	Optional		The character limit is 100.

	Field	Database column (USR_)	Required/ Optional in the template	Required/ Optional in the system	Default Value	Description/Validation
		ESS				
14.	City	CITY	Optional	Optional		The character limit is 100.
15.	US_State_ID	STATE_ID	Optional	Optional		<p>If entered, you must use the two-character state ID, otherwise record will fail. See online Help (“State” link on Import Users page”) or the Administration Guide (“Field Formats for Blank Templates” in the Appendix) for the list of state IDs.</p> <p>Create and Update: U.S. State, if entered, must meet validation standards, otherwise record will fail.</p> <ul style="list-style-type: none"> • The system will validate that if a U.S. State is selected, then United States is indicated as the country or the country is blank. • The system will validate that if a country other than the United States is indicated, the U.S. State field is blank. • The system will validate that both U.S. State and Non-U.S. State/Province do not have values; only one or the other is allowed (but both can be blank).
16.	Non_US_State_Province	PROVINCE	Optional	Optional		<p>Create and Update: Non U.S. State/Province, if entered, must meet validation standards, otherwise record will fail.</p> <ul style="list-style-type: none"> • The character limit is 100. • The system will validate that the Non-U.S. State/Province field is blank if the United States is indicated as the country. • The system will validate that both U.S. State and Non-U.S. State/Province do not have values; only one or the other is allowed (but both can be blank).
17.	Postal_Code	POSTAL_CODE	Optional	Optional		The character limit is 20.
18.	Country_ID	COUNTRY	Optional	Optional		<p>If entered, you must use the two-character country ID, otherwise record will fail. See online Help (“Country” link on Import Users page”) or the Administration Guide (“Field Formats for Blank Templates” in the Appendix) for the list of country IDs.</p> <p>Create and Update: Country, if entered, must meet validation standards, otherwise record will fail.</p> <ul style="list-style-type: none"> • The system will validate that if a U.S. State is selected, then United States is indicated as the country or the country is blank.

	Field	Database column (USR_)	Required/ Optional in the template	Required/ Optional in the system	Default Value	Description/Validation
						<ul style="list-style-type: none"> The system will validate that if a country other than the United States is indicated, the U.S. State field is blank.
	Manager, Job Title, Activity					
19.	Job_Title_ID	JOB_TITLE	<i>Optional</i>	<i>Required</i>	ML.BASE.JOB TITLE.None (Other)	<p>If entered, requires ID of MG job title, otherwise record will fail.</p> <p>Create: If blank in import file or there is no match, the value of Other (ML.BASE.JOBTITLE.None) will automatically be assigned.</p> <p>Update: If blank in import file, the existing value in record (if any) is maintained. If there is no existing value, the value of Other is used.</p>
20.	User_Activity	OBJ_IS_ACTIVE (LMS_OBJECT table)	<i>Optional</i>	<i>Required</i>	T (Active)	<p>If entered, requires value of T (true) or F (false), otherwise record will fail.</p> <p>The character limit is 1 (i.e., "T" or "F").</p> <p>Create: If blank in import file, the value of Active (T) will automatically be assigned.</p> <p>Update: If blank in import file, the existing value in record (if any) is maintained. If there is no existing value, the value of Active is used.</p>
21.	MANAGER_ID	MANAGER_ID	<i>Optional</i>	<i>Required</i>	blank (no user manager)	<p>If entered, requires MG User ID of manager Alternate ID of manager. If a value is entered and there is no match, the record will fail.</p> <p>Create: If missing, the value of None (No Manager Selected) will automatically be assigned. If value is present, try to match first against GLAIT_ALTERNATE_ID and then against USR_LMS_USER_ID in database. Then try to match against Alternate ID value in import file. If there is no match, the value will fail.</p> <p>Update: If blank in import file, the existing value in record (if any) is maintained. If there is no existing value, the value of None is used. If there is a value, the same logic as create is applied.</p>
22.	Organization_ID	ORGANIZATION	Required	Required		Requires MG Organization ID.

	Field	Database column (USR_)	Required/ Optional in the template	Required/ Optional in the system	Default Value	Description/Validation
		_ID				<p>Create: Will fail if blank or if no match is found in ORGANIZATION_ID.</p> <p>Update: Will fail if blank or if no match is found in ORGANIZATION_ID.</p> <p>Action: If user's organization changes, all of the existing triggers (permission changes, required training changes, cost changes, domain changes, emails, etc.) should fire, as if the user organization was changed in their profile.</p>
	Preferences					
23.	508C_OPTION	508C_OPTION	<i>Optional</i>	<i>Required</i>	F (Off)	<p>Section 508C Support - If entered, requires value of T (true = On) or F (false = Off), otherwise record will fail.</p> <p>The character limit is 1 (i.e., "T" or "F").</p> <p>Create: If blank in import file, the value of Off (F) will automatically be assigned.</p> <p>Update: If blank in import file, the existing value in record (if any) is maintained. If there is no existing value, the value of Off (F) is used.</p>
24.	Region_ID	REGION_LOCAL E_ID	<i>Optional</i>	<i>Required</i>	en-US (English (United States))	<p>If entered, requires the ID-equivalent of the values that display in the Region drop down list in the user's profile in the system (i.e. en-US), otherwise record will fail. See online Help ("Region" link on Import Users page) or the Administration Guide ("Field Formats for Blank Templates" in the Appendix) for the list of region IDs.</p> <p>Create: If blank in import file, the default value of English (United States) (en-US) is used.</p> <p>Update: If blank in import file, the existing value in record (if any) is maintained. If there is no existing value, the value of English (United States) is used.</p>
25.	Language_ID	LANGUAGE_LO CALE_ID	<i>Optional</i>	<i>Required</i>	en-US (English)	<p>If entered, requires the ID-equivalent of the values that display in the Region drop down list in the user's profile in the system (i.e. en-US), otherwise record will fail. See online Help ("Language" link on Import Users page) or the Administration Guide ("Field Formats for</p>

	Field	Database column (USR_)	Required/ Optional in the template	Required/ Optional in the system	Default Value	Description/Validation
						<p>Blank Templates” in the Appendix) for the list of language IDs.</p> <p>Create: If blank in import file, the default value of English (en-US) is used.</p> <p>Update: If blank in import file, the existing value in record (if any) is maintained. If there is no existing value, the value of English is used.</p>
26.	Show_Contact_Info	SHOW_CONTACT_INFO	<i>Optional</i>	<i>Required</i>	T (true – show contact information)	<p>If entered, requires value of T (true) or F (false), otherwise record will fail.</p> <p>The character limit is 1 (i.e., “T” or “F”).</p> <p>Create: If blank in import file, the default value of Display Contact Information (T) is used.</p> <p>Update: If blank in import file, the existing value in record (if any) is maintained. If there is no existing value, the value of Display Contact Information is used.</p>
27.	Show_Professional_Info	SHOW PROFESSIONAL_INFO	<i>Optional</i>	<i>Required</i>	T (true – show professional information)	<p>If entered, requires value of T (true) or F (false), otherwise record will fail.</p> <p>The character limit is 1 (i.e., “T” or “F”).</p> <p>Create: If blank in import file, the default value of Display Professional Information (T) is used.</p> <p>Update: If blank in import file, the existing value in record (if any) is maintained. If there is no existing value, the value of Display Professional Information is used.</p>
28.	Time_Zone_ID	TIME_ZONE_ID	<i>Optional</i>	<i>Required</i>	System Time Zone	<p>If entered, requires a numerical value associated with a time zone, otherwise record will fail. See online Help (“Time Zone” link on Import Users page”) or the Administration Guide (“Field Formats for Blank Templates” in the Appendix) for the list of time zone IDs.</p> <p>Create: If blank in import file, the System Time Zone is used.</p> <p>Update: If blank in import file, the existing value in</p>

	Field	Database column (USR_)	Required/Optional in the template	Required/Optional in the system	Default Value	Description/Validation
						record (if any) is maintained. If there is no existing value, the System Time Zone is used.
	Professional					
29.	Company	COMPANY	Optional	Optional		The character limit is 255.
30.	Company_Address	COMPANY_ADDRESS	Optional	Optional		The character limit is 100.
31.	Company_City	WORK_CITY	Optional	Optional		The character limit is 100.
32.	Company_US_State_ID	WORK_STATE_ID	Optional	Optional		<p>If entered, you must use the two-character state ID, otherwise record will fail. See online Help (“State” link on Import Users page”) or the Administration Guide (“Field Formats for Blank Templates” in the Appendix) for the list of state IDs.</p> <p>Create and Update: Company U.S. State, if entered, must meet validation standards, otherwise record will fail.</p> <ul style="list-style-type: none"> • The system will validate that if a U.S. State is selected, then United States is indicated as the country or the country is blank. • The system will validate that if a country other than the United States is indicated, the U.S. State field is blank. • The system will validate that both U.S. State and Non-U.S. State/Province do not have values; only one or the other is allowed (but both can be blank).
33.	Company_Non_US_State_Province	WORK_PROVINCE	Optional	Optional		<p>Create and Update: Company Non U.S. State/Province, if entered, must meet validation standards, otherwise record will fail.</p> <p>The character limit is 100.</p> <ul style="list-style-type: none"> • The system will validate that the Non-U.S. State/Province field is blank if the United States is indicated as the country. • The system will validate that both U.S. State and Non-U.S. State/Province do not have values; only one or the other is allowed (but both can be blank).
34.	Company_Postal_Code	COMPANY_POSTAL_CODE	Optional	Optional		The character limit is 20.
35.	Company_Country_ID	WORK_COUNTRY_ID	Optional	Optional		If entered, you must use the two-character country ID, otherwise record will fail. See online Help (“Country” link on Import Users page”) or the Administration Guide (“Field Formats for Blank Templates” in the Appendix)

	Field	Database column (USR_)	Required/Optional in the template	Required/Optional in the system	Default Value	Description/Validation
						<p>for the list of country IDs.</p> <p>Create and Update: Company Country, if entered, must meet validation standards, otherwise record will fail.</p> <ul style="list-style-type: none"> The system will validate that if a U.S. State is selected, then United States is indicated as the country or the country is blank. The system will validate that if a country other than the United States is indicated, the U.S. State field is blank.
36.	Job_Start_Date	JOB_START_DATE	Optional	Optional		<p>Create and Update: The date format is controlled by .NET drivers for each of the accepted file types. Meridian Global processes the date data received from these drivers. There are some best practices to ensure that date data is not lost and that the system gets the correct date (month/day are not reversed):</p> <ol style="list-style-type: none"> Always include a date with month, day, and year (otherwise the drivers will insert the current year as the year). Use the same date format for a single import. In tests with CSV files with "mixed" formats, the system reverses the month/day for some date formats. The safest approach is to use a date format with the month as text (such as Jan or January). Note: CSV files only support three-digit month format. Carefully check test import details following an import test before proceeding with the import, to ensure the dates are correct and that they have not been lost. <p>Some other things to note:</p> <ol style="list-style-type: none"> In some cases, the drivers may correct or remove invalid date formats and the record will succeed. In others, the drivers may fail invalid date formats, and the record will fail. Date formats do not require time. If no time is included, the system will automatically include the time of 12:00 am. If time is included, it is stored relative to the system time zone.
37.	Job_End_Date	JOB_END_DATE	Optional	Optional		<p>Create and Update: See validation for Job_Start_Date.</p>
38.	Professional_Ex	JOB_DESCRIPTOR	Optional	Optional		The character limit is 2,000.

	Field	Database column (USR_)	Required/ Optional in the template	Required/ Optional in the system	Default Value	Description/Validation
	perience	ON				
39.	Education_Level_ID	EDUCATION_LEVEL_ID	Optional	Optional		If entered, requires one of the following values: ML.BASE.DV.EducationLevelBachelors ML.BASE.DV.EducationLevelHighSchool ML.BASE.DV.EducationLevelOther
40.	Education_Description	EDUCATION_DESCRIPTION	Optional	Optional		The character limit is 2,000.
41.	Expertise	EXPERTISE	Optional	Optional		The character limit is 2,000.