IMODULES

SFTP Automated Import Tool

Key Points

- Upload a file (up to 50 MB) via a secure FTP (SFTP) connection.

- Automatically picked up by the Import Member Data application.

- Imported into the community as a regular import so the administrators will receive the standard import tool notification.

- Enables you to build an automated process from your back end data system to generate an import file and send it to the SFTP folder for importing into your community.
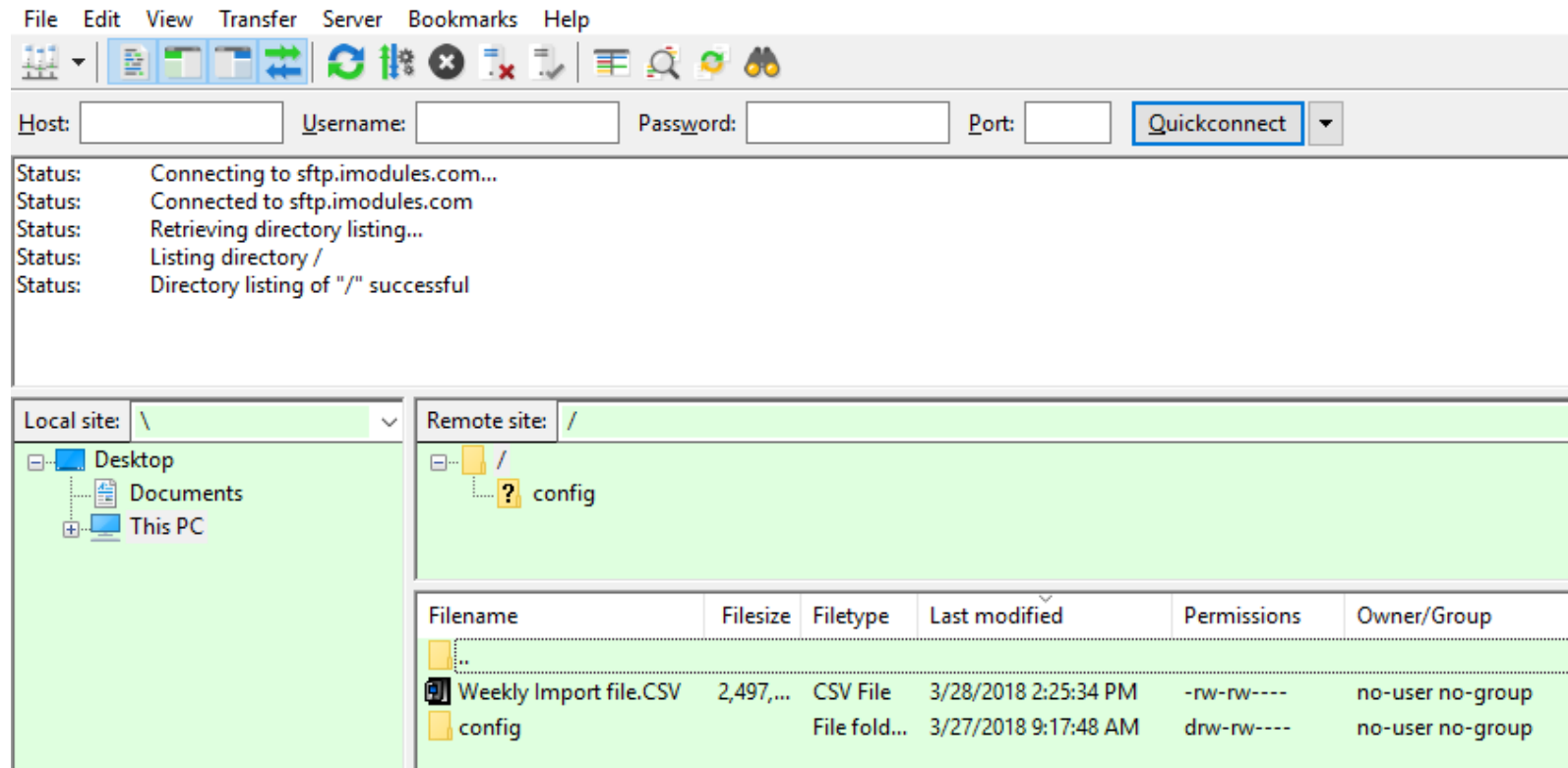
IMODULES

Helpful Information

- Fix it and forget it configuration settings.
  - Once it's set up, you shouldn't need to make frequent changes.

- SFTP with SSH2 protection.

- Queue grabs files every morning at 5:30 and 7:30 AM Central.

- There is NO COST to utilize SFTP imports.

IMODULES

What You'll Need

- An understanding of the manual import tool.

- Secure FTP client software.

- A password will be automatically generated and provided to you, or you can choose to generate an SSH key pair and provide us the public key to set up folder access.

IMODULES

Example: FTP Client

- This is an example of an FTP client where the files will be added.

- The config.xml file stores the settings for the import.

IMODULES

SFTP Configuration File

```xml
<root>
  <!--This is how many days previous to today need to be excluded.-->
  <!--Put in NA if you want it to write all-->
  <!--Note, this app runs past midnight, so if you upload a file at 3 PM on 1/15 and you want to exclude 1/13
      through when the file is imported this needs to be set to three days.-->
  <dontOverWriteFieldDaysAgo>1</dontOverWriteFieldDaysAgo>          ←————————————————————

  <!--The options here are as below, WriteAll is going to be the most common-->
  <!--WriteAll-->
  <!--NullValue-->
  <!--BlankValue-->
  <!--IMPORTANT - The last option is custom, if you do not include one of the three above in its exact syntax whatever is
entered will be considered custom-->
  <dataMarker>WriteAll</dataMarker>          ←————————————————————

  <!--This is what member is responsible for the import. This is the iModules Member ID. This member will get emailed
the standard import tool notifications.-->
  <memberId>89958</memberId>          ←————————————————————

  <!--This specifies whether the change history info should be recorded for this import. It is an optional parameter
which overrides a site-level setting with the same name.-->
  <SaveImportInfoLogItems>false</SaveImportInfoLogItems>          ←————————————————————
</root>
```

IMODULES

SFTP Automated Import Tool

From: noreply@imodules.com
To: jmaack@imodules.com
Cc:
Subject: [iModules] Import Completed

Dear Administrator:

Your import into iModules has been processed.

Description: "State Import - JM"

Import Success Log
Import Error Log

Changed Rows: 27
Unchanged Rows: 30
Failed Rows: 0
New Rows: 1

Ignored Columns:
No columns were ignored in the import file.

Best regards,

iModules

- A sample confirmation message is shown on the left.

- Processing is the same as the manual import tool.

- Error/Success logs will be available.

IMODULES

Next Step

- Contact your Project Manager or Account Manager to begin the implementation of the SFTP Automated Import tool.

- Another import option available to you is Web Services. Please speak with your Project Manager or Account Manager for further details.

IMODULES