

SHRM Hosted Sites Dual Membership Program New Member Import



Contents

Introduction	3
Background	3
Prepare Import File	4
Import Tool Access	4
Choose File.....	5
Field Match.....	7
Setting the Username	8
Setting the Password	8
Options	8
Role Assign	8
Welcome Email	9
Update Existing Users	9
Save Settings	10
Test & Import	10
Import Results	11
After the Import.....	11
After Activating the Record	12
Questions or Need Help.....	13

Introduction

In addition to the reports now available through the Dual Membership Release (DMR) program and/or the Affiliate Management Portal (AMP), many chapters maintain a separate chapter member database for such purposes as a membership directory accessible by their members, direct email communications from the chapter to its membership, etc.

This guide is for Administrators of SHRM hosted websites that are participating in the Dual Membership Release program and provides instructions for adding **new** members to a chapter membership database (if applicable) using the daily Transaction report and the User Import tool.

NOTE: To provide a good Member experience, it is highly recommended that your chapter ensure that all new members are communicated with and/or added to your chapter membership database (if applicable) within three business days.

Background

Each day the chapter will receive a transaction report listing all transactions for new members and renewals, to include purchases for pending future membership renewals, which have taken place in the previous 30 days.

The hosted site software does not prevent duplicate records, which means that you should only import **new members**. You should not import renewing or rejoining members.

Should you wish to add the members manually, the instructions are in your Training Center under the sub-heading of **Managing Members > Membership Database**.

If you have questions about the Import Tool or your SHRM hosted website, please [submit a ticket](#) for assistance from the SHRM Affiliate Website Service Desk.

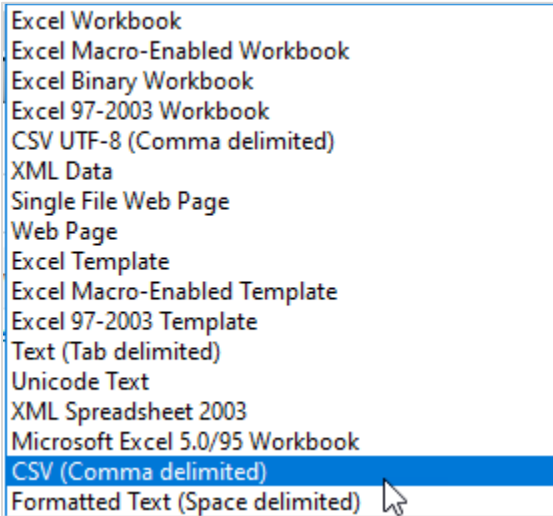
If you have questions about the daily Transaction Report, please contact [SHRM Member Relations](#).

Prepare Import File

The first step is to prepare the DMR daily transaction report excel file by making a copy and then removing from that copy all that are not verified as being new members (i.e., renewing members or pending future membership renewals).

This will ensure that you have the original file with all transaction details and then a copy containing only the **new members** that you need to import into your chapter membership database.

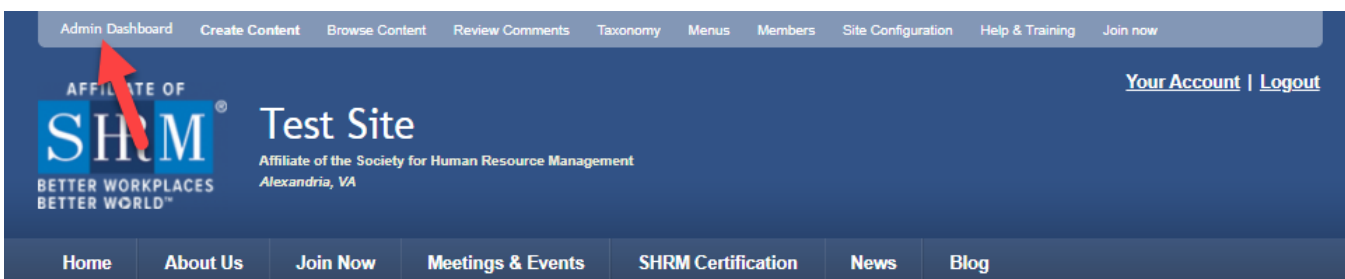
Now, save the copy containing only the new members as a CSV (Comma delimited) file:



After taking these steps, your file is ready to import.

Import Tool Access

Login to your SHRM hosted website and from the admin links found at the top of your site, select **Admin Dashboard**:



From the Admin Dashboard, scroll to the **User Management** section and select the **Import Members** link:

User Management

Member Categories

Here is a listing of your member categories.

Title
09 Orientation Discount
2 yr Local
2 yr Local with National
2009 Board of Directors

Manage chapter members and administrator accounts.

[Member Directory Search](#)
Search Members

[View Pending Members](#)
View pending new member registrations.

[Manage Site Administrators](#)
Manage site administrator accounts.

[Create Members & Administrators](#)
Create new member or chapter administrator accounts.

[Manage Membership Profile Fields](#)
Enhance your member registration / profile fields by adding your own, or editing the set of default fields.

[Manage Membership Categories](#)
Create new and or edit existing membership categories used for group mailings.

[Registration Settings](#)
Define how you want member accounts created and the various email settings when members join your chapter.

Import Members
Import a list of Members from .csv file.

Choose File

From the **Browser Upload** section, click the **Choose File** button to search for the CSV file from your computer:


Browser Upload

Upload a CSV file.

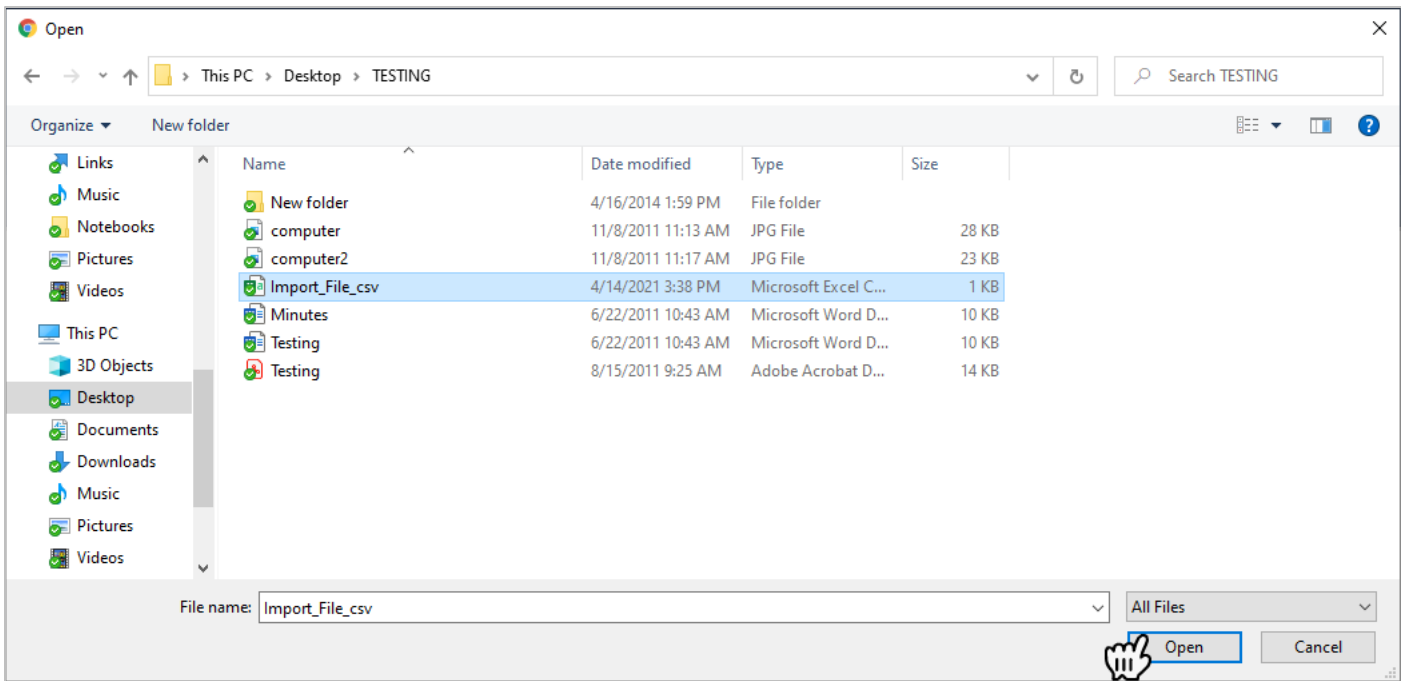
CSV File

No file chosen

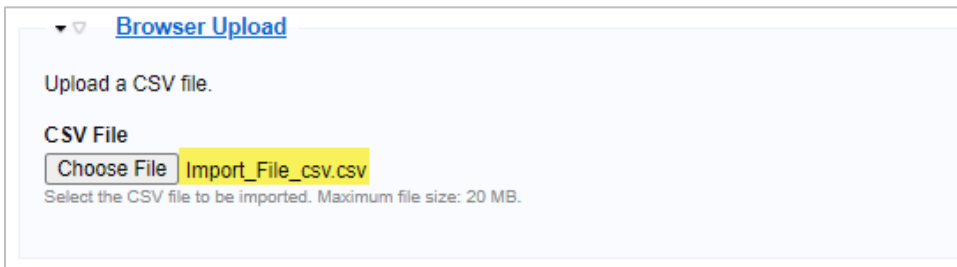
Select the file to be imported. Maximum file size: 20 MB.



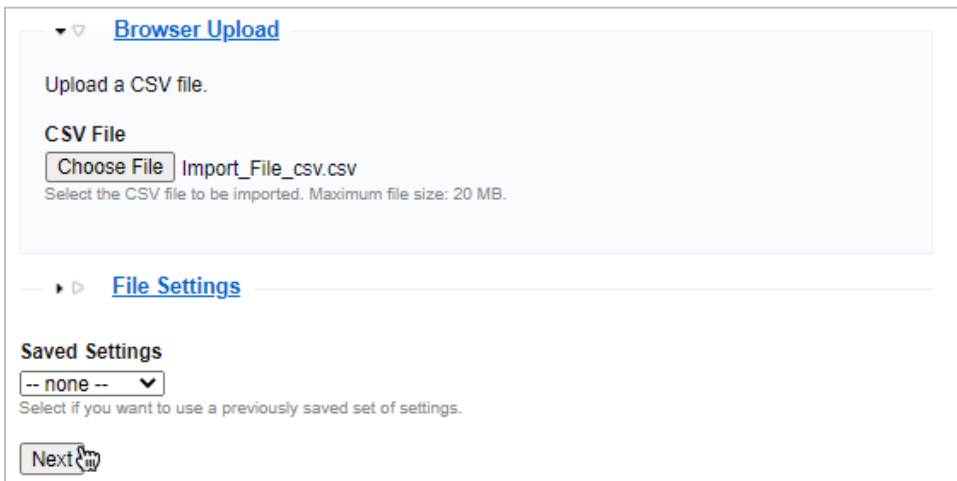
Browse for your file, select it, and click the **Open** button:



After clicking Open, you will be directed back to the Browser Upload section in your site and should see the name of the file you selected:



Now that you have selected your file, click the Next button:



Field Match

In this step you will match the fields found in the CSV file that you created to fields found in your chapter membership database called Drupal fields. To do the field match, click the drop-down arrow for each field and then select the matching information.

If there is a field listed in the CSV file column and you cannot find a match in the Drupal fields drop-down, this means the field does not exist in your database and the information will not be imported.

In addition, sometimes you will have Drupal fields, but do not have the information in your CSV file and that does not cause any import issues.

Reference Material: You can learn more about Database Management within your website Training Center under the **Managing Members/Membership Database** subheading by reading the article titled **Editing Member Profiles**.

CSV column	Drupal fields	Username	Abbreviate
Email	Email Address*	--	<input type="checkbox"/>
First Name	First Name	1	<input type="checkbox"/>
Middle Name	-----	--	<input type="checkbox"/>
Last Name	Last Name	2	<input type="checkbox"/>
Job Title	Business Title	--	<input type="checkbox"/>
Company Name	Company Name	--	<input type="checkbox"/>
Primary Address 1	Address	--	<input type="checkbox"/>
Primary Address 2	Address 2	--	<input type="checkbox"/>
Primary Address 3	-----	--	<input type="checkbox"/>
Primary City	City	--	<input type="checkbox"/>
Primary State	State or Province	--	<input type="checkbox"/>
Primary Zip Code	Postal Code	--	<input type="checkbox"/>
Country	Country	--	<input type="checkbox"/>
Primary Phone	Telephone	--	<input type="checkbox"/>
Primary Fax	-----	--	<input type="checkbox"/>
Certifications	-----	--	<input type="checkbox"/>
SHRM National Member Email	-----	--	<input type="checkbox"/>
Secondary Address 1	-----	--	<input type="checkbox"/>
Secondary Address 2	-----	--	<input type="checkbox"/>
Secondary City	-----	--	<input type="checkbox"/>
Secondary State	-----	--	<input type="checkbox"/>
Secondary Zip	-----	--	<input type="checkbox"/>
Secondary Email	-----	--	<input type="checkbox"/>
Secondary Phone	-----	--	<input type="checkbox"/>
Join Date	Join Date	--	<input type="checkbox"/>
Expiration Date	Expiration Date	--	<input type="checkbox"/>

Setting the Username

Because you are importing **new** members, you will need to set a username. To do this, under the column titled **Username**, click the drop-down arrow for First Name and select one and then the drop-down arrow for Last Name and select 2:

CSV column	Drupal fields	Username	Abbreviate
Email	Email Address*	--	<input type="checkbox"/>
First Name	First Name	1	<input type="checkbox"/>
Middle Name	-----	--	<input type="checkbox"/>
Last Name	Last Name	2	<input type="checkbox"/>

Taking the above steps will set the username for everyone on the import file to their First and Last Name, with no spaces. The username will look like this: FirstnameLastname or StevePerry

Setting the Password

The password is system generated and not something that you set-up.

Options

Place a checkmark in the selection **Ignore First Line**. This tells the software to ignore the headers in your CSV file (ex: First Name, Last Name):

Options

Ignore First Line
If the first line is the names of the data columns, set to ignore first line.

Contact
Set each user's personal contact form to 'allowed'.

Send Email
Send email to users when their account is created.

Username Space
Include spaces in usernames, e.g. 'John' + 'Smith' => 'John Smith'.

Activate Accounts
User accounts will not be visible to other users until their owner logs in. Select this option to make all imported user accounts visible. **Note - one time login links in welcome emails will no longer work if this option is enabled.**

No other selections are needed.

Role Assign

Because you are importing **New Members**, you should select the Role of **Pending**:

▼ ▾ [Role Assign](#)

Assign Role(s) To All Users

Active Member

Board member

Chapter Admin

Drupal Admin

Expired Member

Non Member

Pending Member

Selecting the Role of Pending allows you to change the status later to Active which triggers the system to send the new member an email with login instructions. Choosing any other role will not allow the system to send this important email.

Welcome Email

You will not be using this feature to send an email because you will be using the default message. This default message automatically sends once you have changed the member status from Pending to Active and provides login instruction.

Update Existing Users

Because you will be importing **New Members only**, leave the default option of **No Update** selected for all:

▼ ▾ [Update Existing Users](#)

Profile

No Update

Replace Data

Add Data

Affected: Profile fields.

Roles

No Update

Replace Data

Add Data

Affected: roles assigned to user.

Password

No Update

Replace Data

Affected: password.

Contact

No Update

Replace Data

Affected: user contact option.

Save Settings

You can enter a name for the settings you just selected and save them for future imports. For example, you can create a setting called Pending Members and next time you have this type of import, you can select from the saved settings and will not need to do the field match and/or select other options:

Save Settings

Save settings for re-use on other imports.

Settings Name

Name to identify these settings by.

Save

Test & Import

Test

Selecting this option allows you to run a test with the settings you have selected to see if there are any errors or issues that need to be corrected before importing:

Tested

file	started	processed	importable	errors	status
Import_File_csv.csv	April 13, 2021 - 3:58pm	3	2	1	tested

[Delete](#) | [Import](#)

If there are any errors, you can view them to find out the issue before proceeding and make any adjustments needed.

Import

Selecting this option will start the import and you will receive a confirmation message. If you wish to continue, click the **Import** button. If you would like to abort the import, click the **Cancel** link:

Are you sure you want to import users?

Start importing users.

Import [Cancel](#)

Import Results

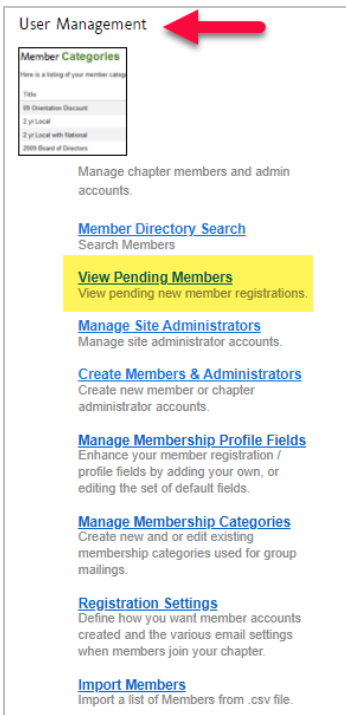
After the import is complete, you will see the results:

file	started	processed	imported	errors	status
Import_File_csv.csv	April 14, 2021 - 3:43pm	2	2	0	imported

[Delete](#)

After the Import

After the import is complete, you will be able to find the list of Pending Members you added by clicking the **Admin Dashboard** link found at the top of your site and then scroll to the **User Management** section and select the **View Pending Members** link:



User Management

Member Categories
Here is a listing of your member categories.

Name
00 Organization Element
1 Local
2 Local with National
0000 Board of Directors

Manage chapter members and admin accounts.

[Member Directory Search](#)
Search Members

View Pending Members
View pending new member registrations.

[Manage Site Administrators](#)
Manage site administrator accounts.

[Create Members & Administrators](#)
Create new member or chapter administrator accounts.

[Manage Membership Profile Fields](#)
Enhance your member registration / profile fields by adding your own, or editing the set of default fields.

[Manage Membership Categories](#)
Create new and or edit existing membership categories used for group mailings.

[Registration Settings](#)
Define how you want member accounts created and the various email settings when members join your chapter.

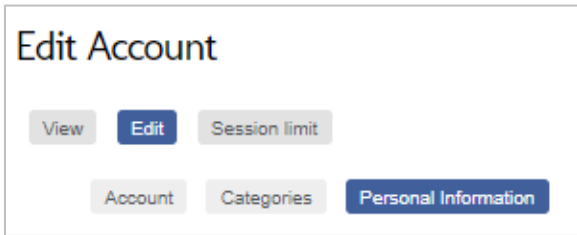
[Import Members](#)
Import a list of Members from .csv file.

Once you have the list of pending members, you will need to activate the record by changing the status from Pending to Active.

To do this, click the name of the member from the pending list. Once in the member record, click the **Edit** button which will direct you the **Account** screen. Scroll down on the account screen and place a check mark in the status box for **Active** and click the **Save** button:

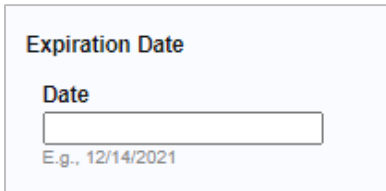
<input checked="" type="checkbox"/> Active Member
<input type="checkbox"/> Expired Member
<input type="checkbox"/> Pending Member
<input type="checkbox"/> Non Member

If you would like to add an expiration date to the record after making the member Active, click the Personal Information tab:



The screenshot shows the 'Edit Account' page with several tabs: 'View', 'Edit', 'Session limit', 'Account', 'Categories', and 'Personal Information'. The 'Personal Information' tab is highlighted in blue, indicating it is the active section.

Scroll down to Expiration Date and enter the information and then Save:



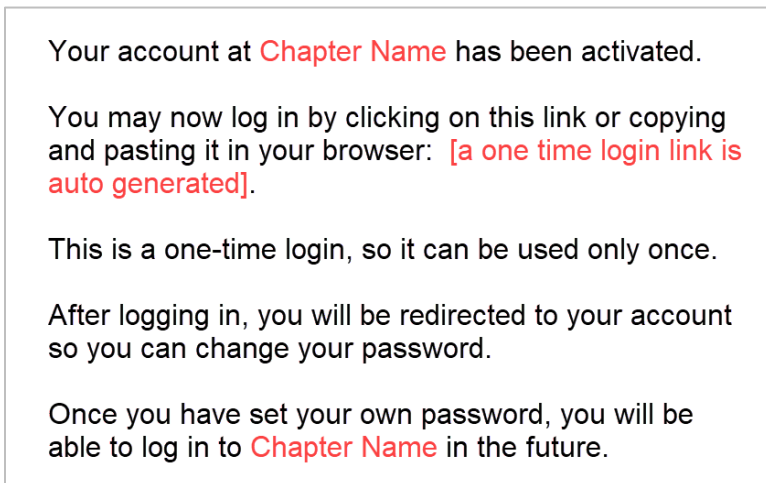
The screenshot shows the 'Expiration Date' section with a 'Date' label and an input field. Below the input field, there is a placeholder text: 'E.g., 12/14/2021'.

After Activating the Record

Now that you have activated the member record, they are an Active Chapter Member in your database. The member can now login and manage their record as well as access member protected content.

In addition, because you changed the status from Pending to Active, a Member Account Activation email with a one-time login link to access the chapter website will automatically be sent.

Example below of email message sent:



The screenshot shows an email message template with the following text:

Your account at **Chapter Name** has been activated.

You may now log in by clicking on this link or copying and pasting it in your browser: **[a one time login link is auto generated]**.

This is a one-time login, so it can be used only once.

After logging in, you will be redirected to your account so you can change your password.

Once you have set your own password, you will be able to log in to **Chapter Name** in the future.

Note: The message above is the default message that your chapter may be using. You have the option to modify the message, however you need to ensure that it is clear to the new member that these login instructions are for your chapter website and is separate from their SHRM (national) membership login credentials.

Reference Material: You can learn how to modify the Member Account Activation email message by reading the article titled **Customizing the Registration Process** found under the **Managing Database Fields & Join Now Application** sub-heading.

Questions or Need Help

If you have questions about the Import Tool or your SHRM hosted website, please submit a [ticket](#) for assistance from the SHRM Affiliate Website Service Desk.