# SHRM Hosted Sites

# Dual Membership Program Member Import


**One transaction. One profile. Dual membership.**

### Add Chapter to your SHRM Membership

Click "Sign in" below, then select your state and Chapter from the drop down box, and follow the steps!

Sign In

### Join/Renew SHRM and Your Chapter

Click "Join/Renew Now" below, and follow the steps.
Be sure to add your Chapter.

Join/Renew Now

*This chapter is a 100% membership chapter, which means you must also be a member of the national SHRM organization (www.shrm.org). In order to join you will be required to enter your National SHRM email address for auditing purposes.

# Contents

# Introduction

This guide is for Administrators of SHRM hosted websites that are participating in the Dual Membership Program.

It is the responsibility of the chapter to add members to the database within **72 hours**. SHRM does not add this information for you and there is no connection between your SHRM hosted website membership database and SHRM's database.

This guide was designed to provide you instructions for adding new members to the database using the daily Transaction report and the User Import tool.

# Background

The chapter receives two reports daily from SHRM:

- Transaction Report which shows new members, membership renewals, etc.
- Roster which provides the full list of members

You should use the daily transaction report to import new members into the database.

The hosted site software was designed to prevent duplicate records, which means that you can only import new members. You should not import renewing or rejoining members.

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

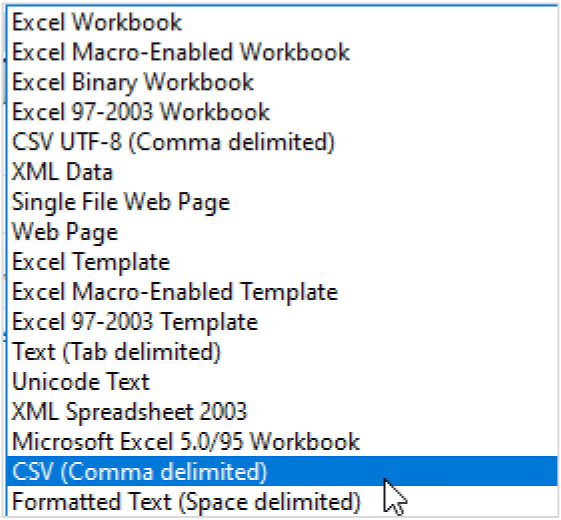
Should you have questions about the Import Tool or your SHRM hosted website, please submit a Support Request for assistance. Submitting the request will generate a Support Ticket for the SHRM Affiliate Website Service Desk and allows SHRM the ability to track the type and number of questions and/or issues as well as the assistance provided.

If you have questions about the daily Transaction Report or the Roster, please contact your Member Engagement Associate and/or Field Service Director.

## Prepare Import File

The first step is to prepare the daily transaction excel file by making a copy and only keep NEW members on the report.  This way you have the original file with all details and then the copy that has only new members for the import.

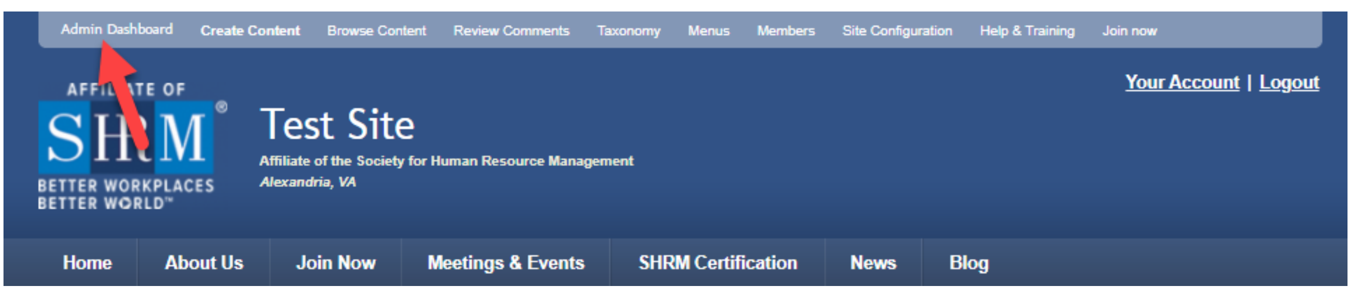
Now, save the copy of the daily transaction report excel file containing only new members as a CSV (Comma delimited) file:



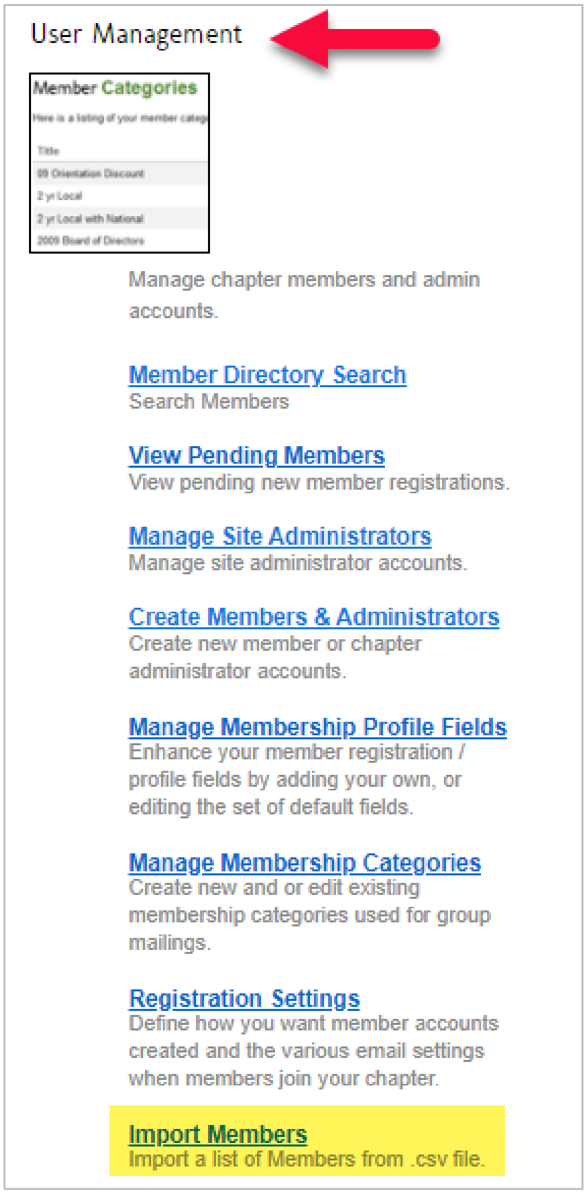

After taking these steps, your file is ready to import.

## Import Tool Access

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

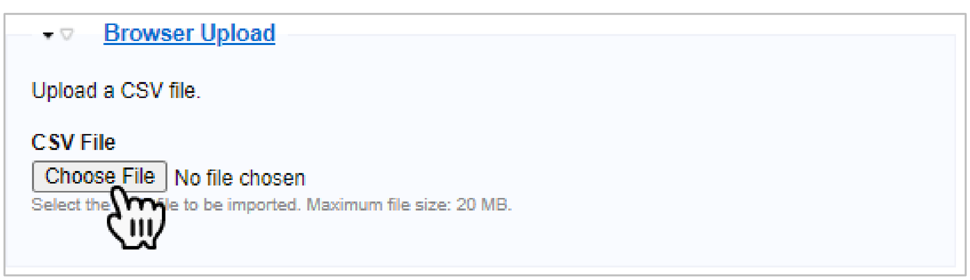



From the Admin Dashboard, scroll to the **User Management** section and select the **Import Members** link:

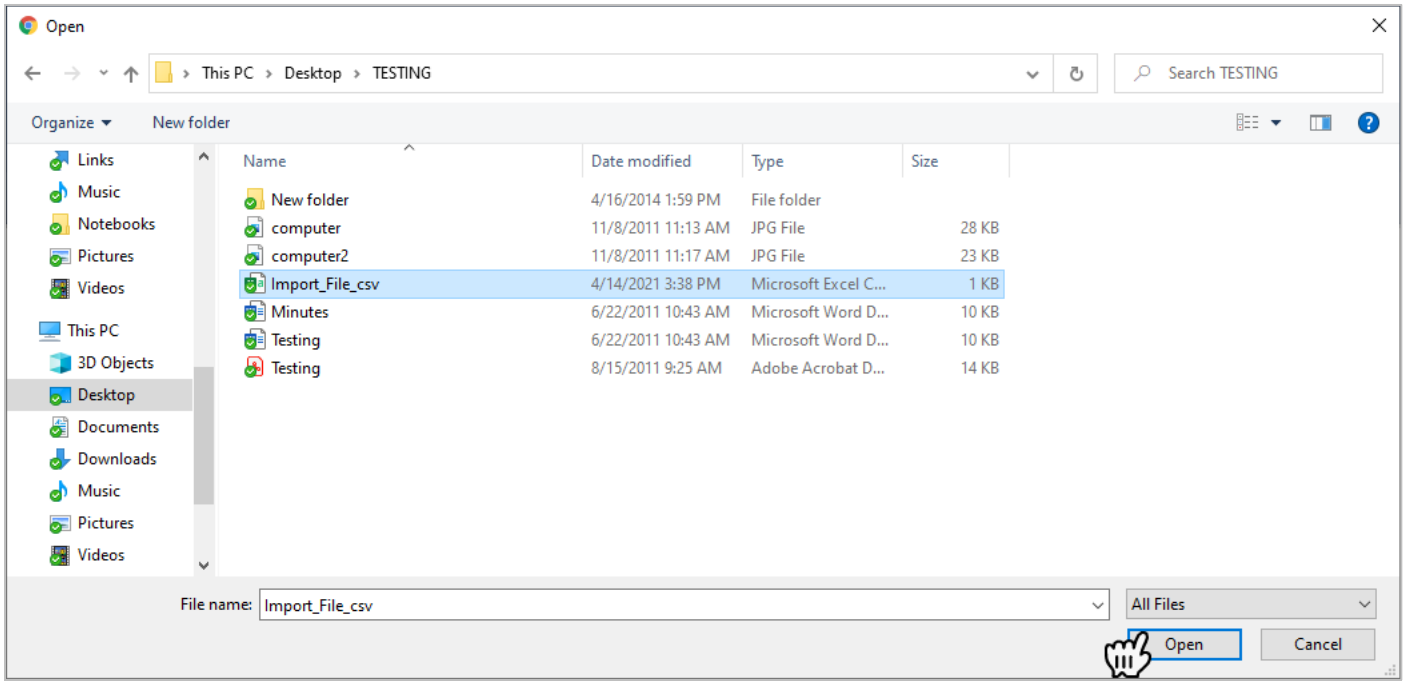



## Choose File

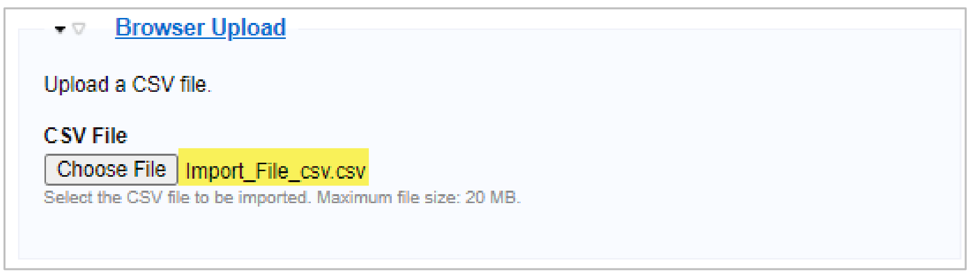
From the **Browser Upload** section, click the **Choose File** button to search for the CSV file from your computer:



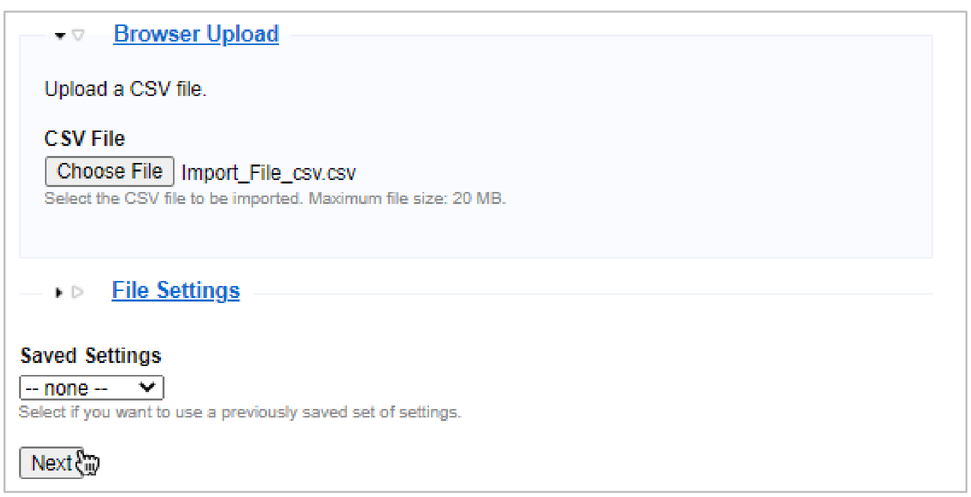

Browse for your file, select it, and click the **Open** button:




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

This is where you will match the fields found in the CSV file to the member database, called Drupal fields. To do the field match, click the drop-down arrow for each field and then select the matching information.

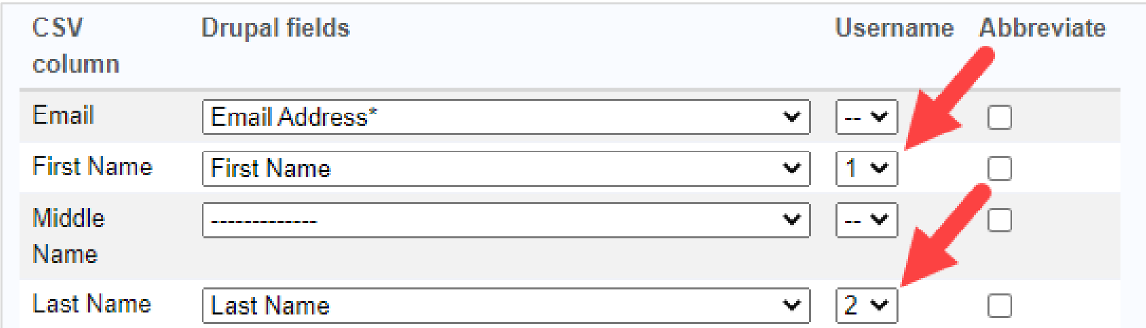
If there is a field listed in the CSV file column and you cannot find a match in the Drupal fields drop-down, this means the field does not exist in your database and the information cannot be added.

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.

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

## 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 1 and then the drop-down arrow for Last Name and select 2:



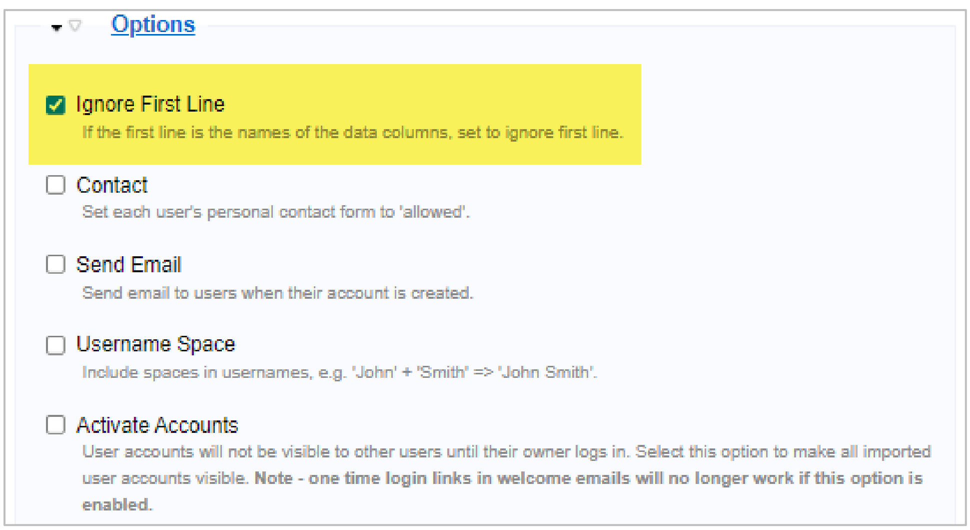

Taking the above steps will set the username for everyone on the import file to their First and Last Name, with no spaces.  The username will look like this:  FirstnameLastname or StevePerry

## Setting the Password

The password is system generated and not something that you set-up to help keep this information secure.

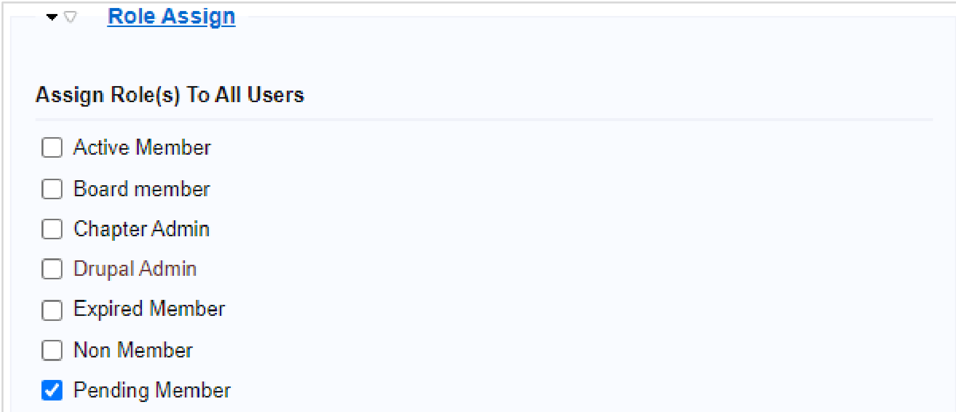
## Options

The only selection needed **Ignore First Line**. This is because your CSV file has headers such as First Name, Last Name, etc.  So, selecting this option will instruct the tool to ignore this first line of the file:




## Role Assign

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



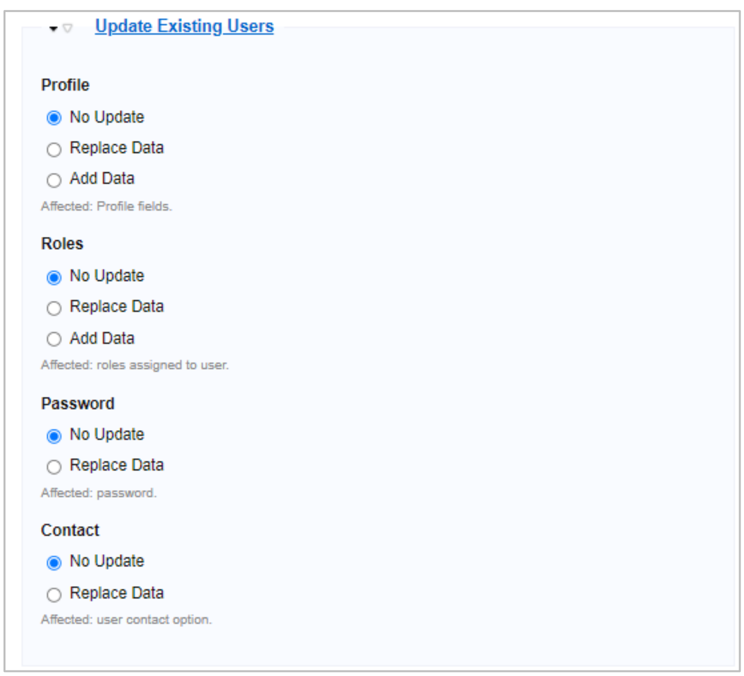

Selecting the Role of Pending allows you to change the status later to Active which triggers the system to send the new member an email with login instructions.  Choosing any other role will not allow the system to send this important email.

## 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.

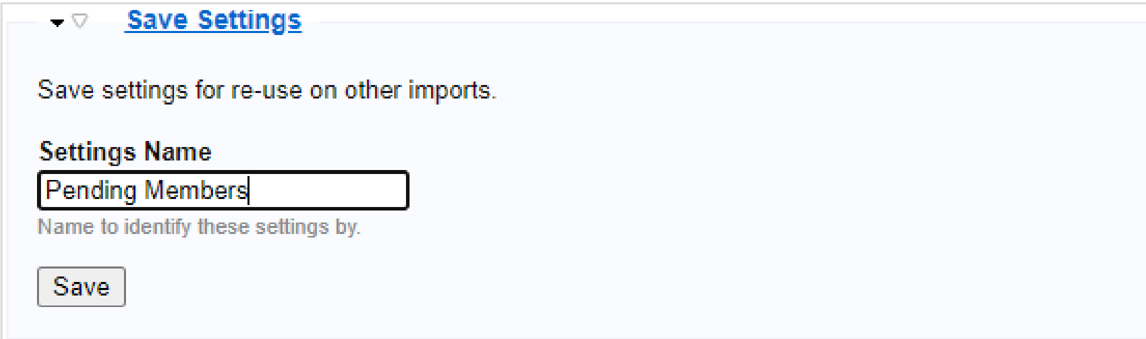
## Update Existing Users

Because the import tool has been designed to import **New Members only**, leave the default option of **No Update** selected for all:



## Save Settings

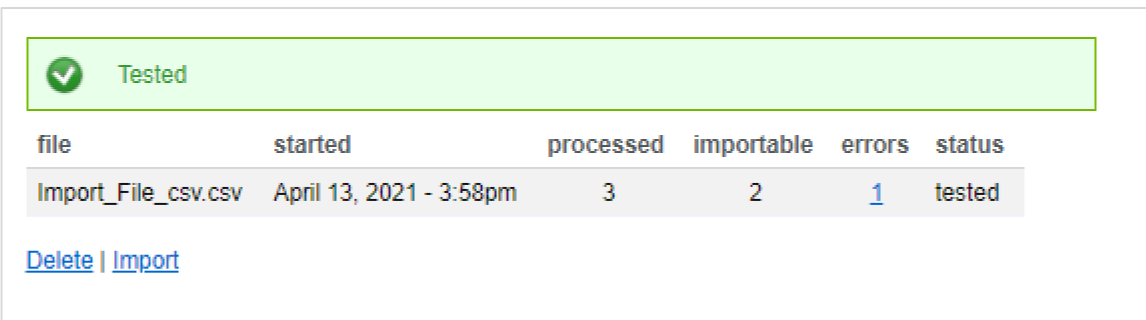
You can enter a name for the settings you just selected and save them for future imports. For example, you can create a setting called Pending Members and next time you have this type of import, you can select from the saved settings and will not need to do the field match and/or other options:




## Test & Import

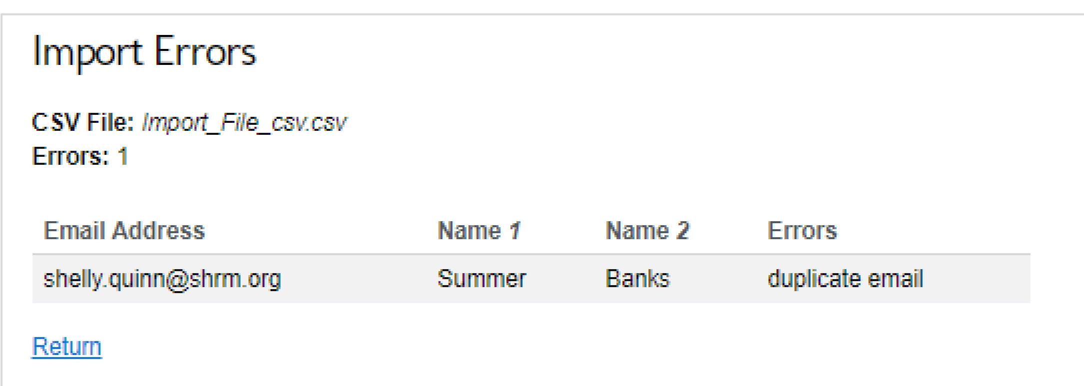
**Test**

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 fixed before importing:



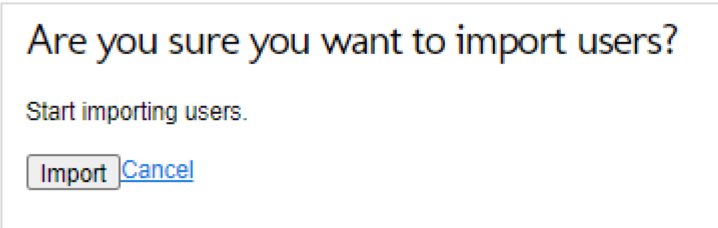

If there are any errors, you can view them to find out the issue before proceeding and make any adjustments needed.

For instance, below shows that a duplicate email was found. You can move forward with the import because the system will not import this information because that would create a duplicate record in the database:



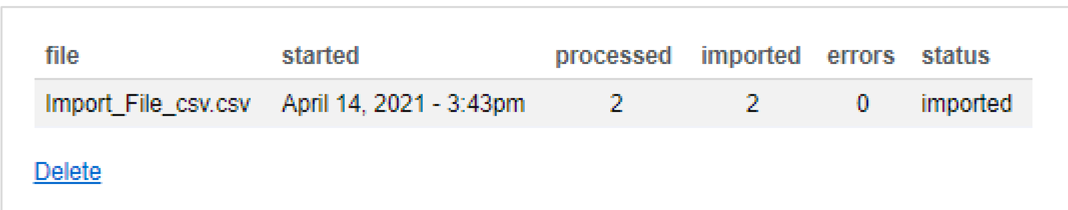
**Import**

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:



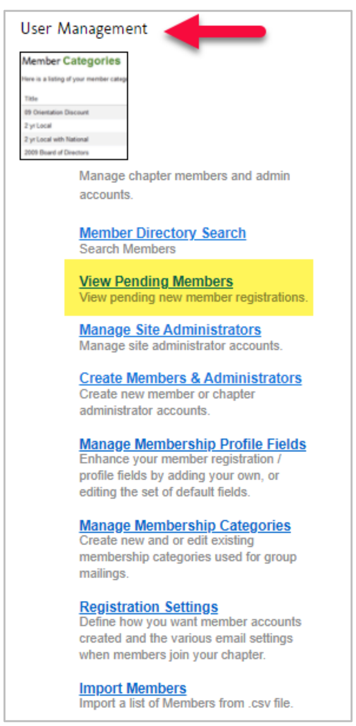

## Import Results

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




## After the Import

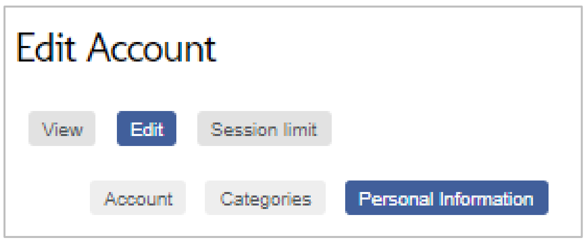
After the import is completed, you will be able to find a listing of Pending Members by clicking the **Admin Dashboard** link found at the top of your site and then scroll to the **User Management** section and select the **View Pending Members** link:



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:


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




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


## After Activating the Record

Now that you have activated the member record, the member will be listed as an Active Member in your database and will be able login to member protected content if you have any posted.

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

The message looks like the example below:

> 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.

## Questions or Need Help

If you need guidance or technical support, please submit a Support Request as required per the SHRM Training & Support Guidelines.

Submitting the request will generate a Service Desk Ticket so that we can help.