Spotlight Bulk User Insert Wizard User Guide

Blackchair Spotlight

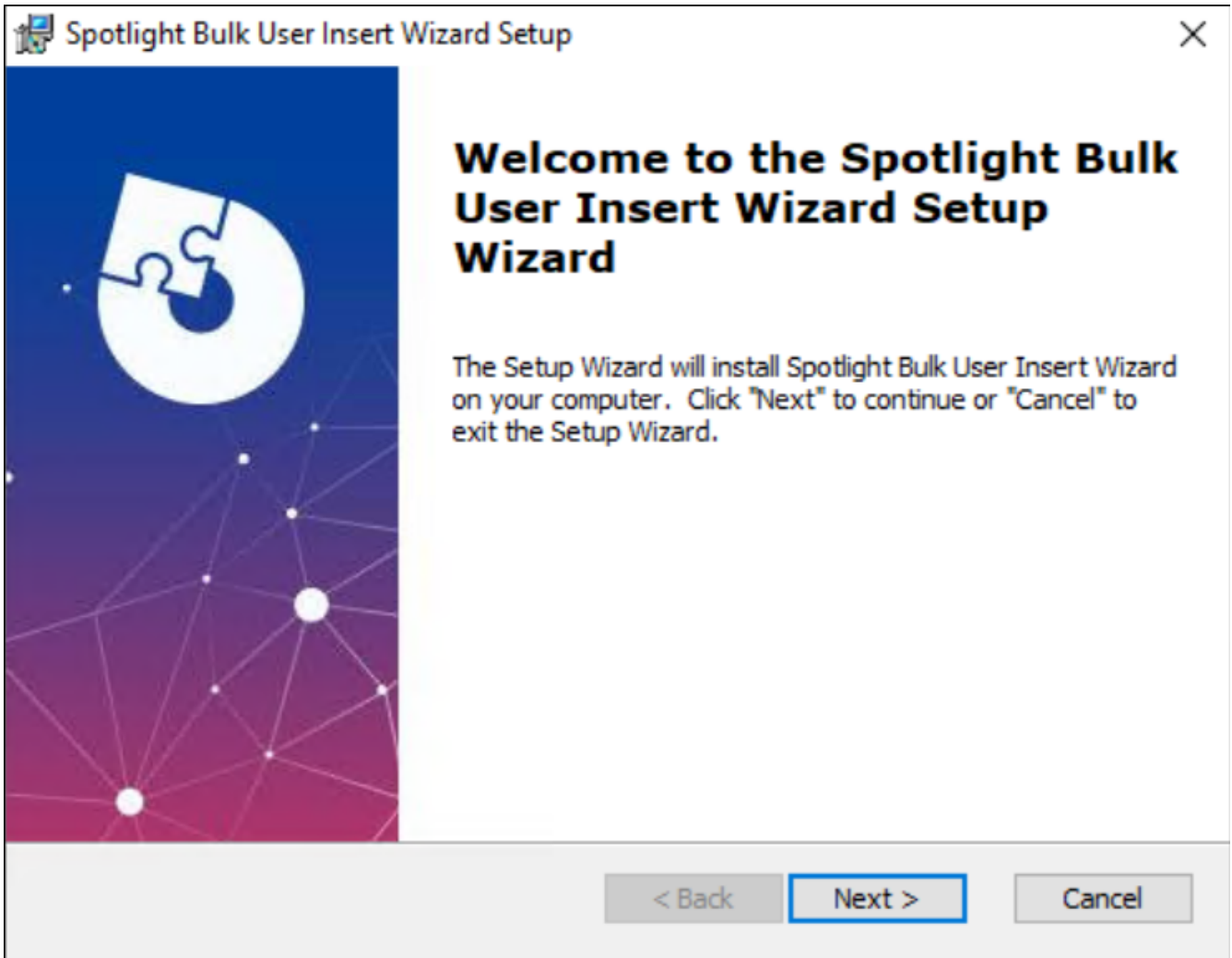**Bulk User Insert Wizard User Guide**

Version 2.1.0

Introduction

The Spotlight Bulk User Insert Wizard is a GUI driven tool designed to allow Spotlight Admin users to add multiple Spotlight users to an existing Spotlight environment without utilising the Spotlight UI.
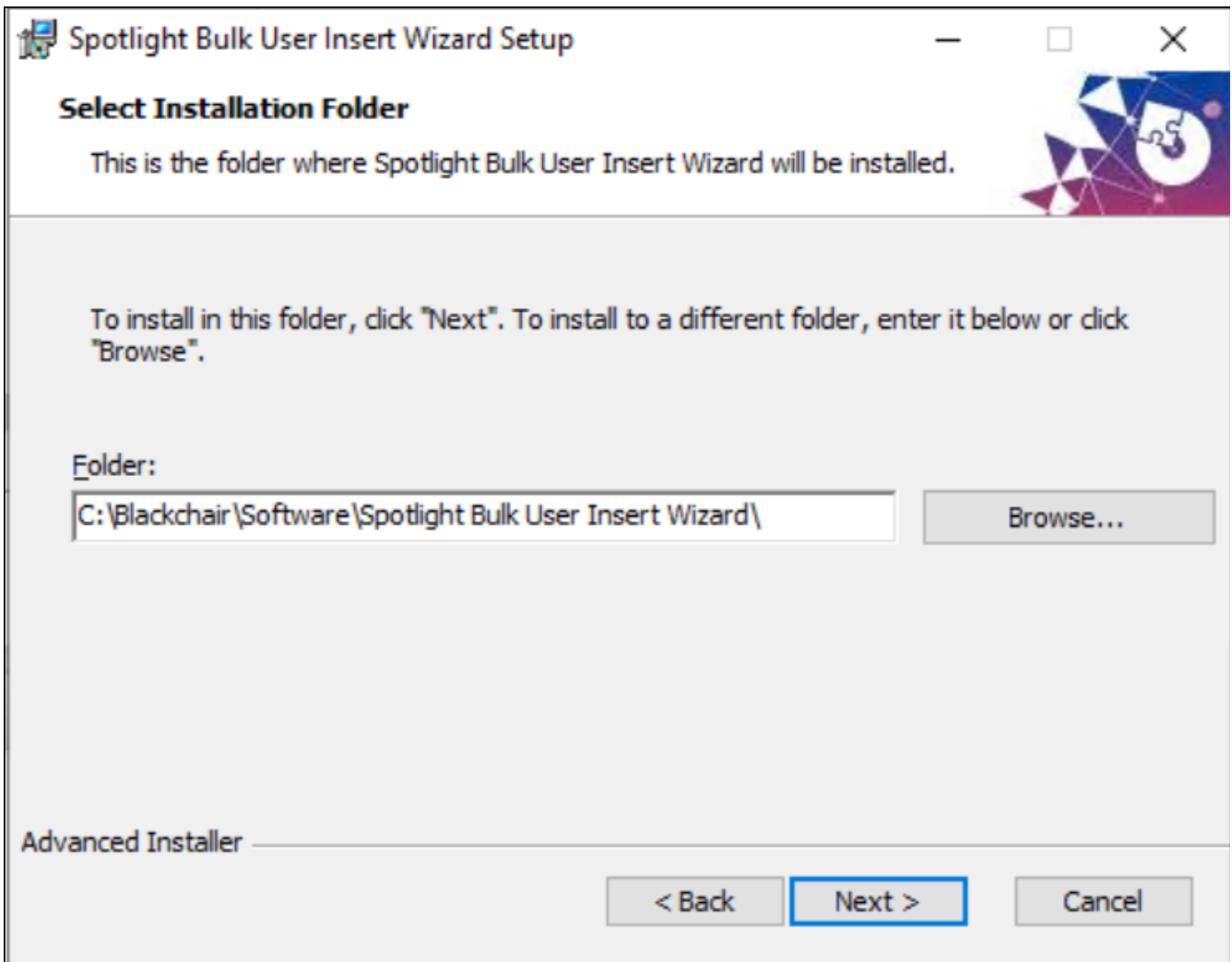
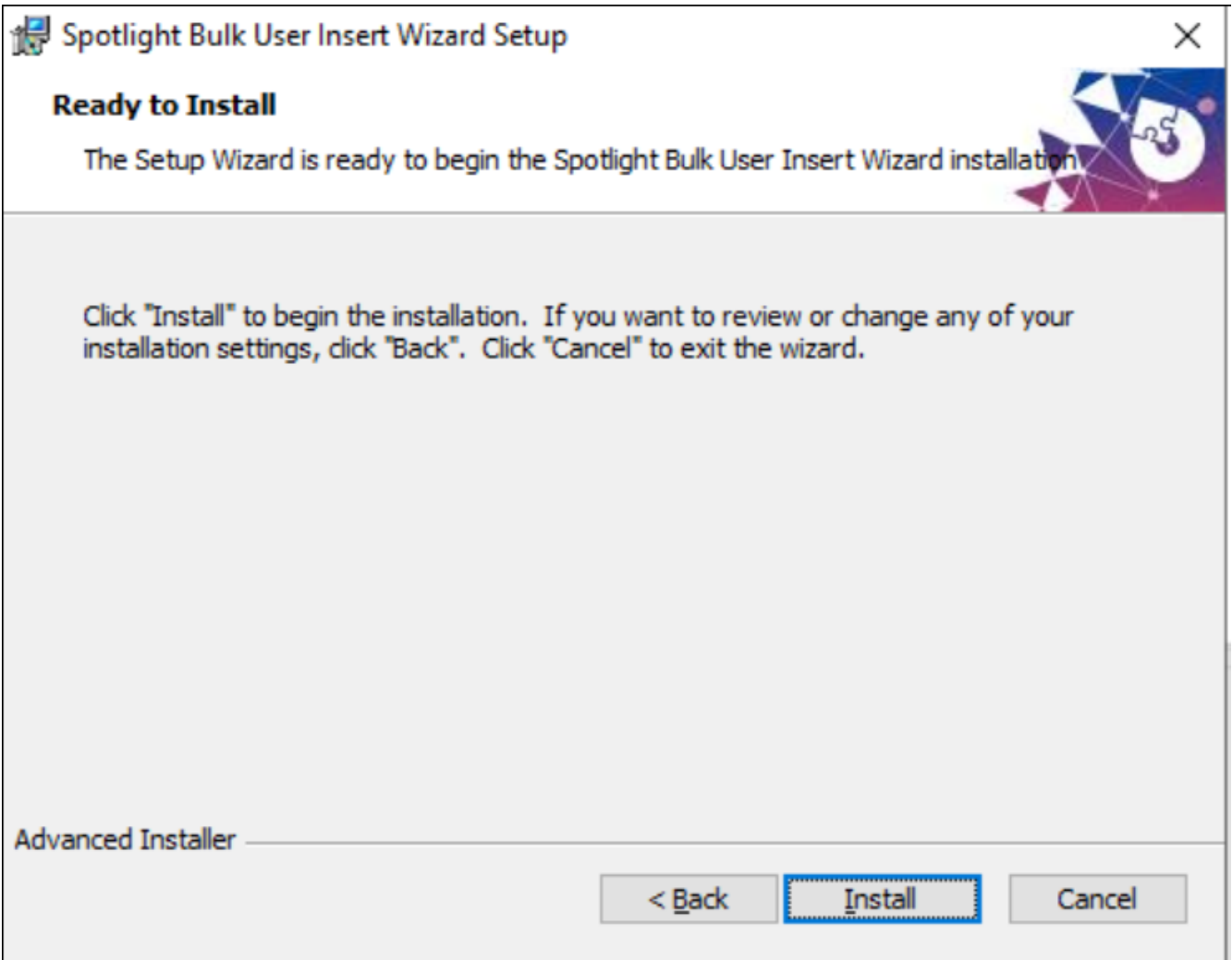Summary

Wizard Setup

To install the Wizard:

- Open the Windows Installer file - **Spotlight Bulk User Insert Wizard - version number**
- Select **Next**

Spotlight Bulk User Insert Wizard Setup

Welcome to the Spotlight Bulk User Insert Wizard Setup Wizard

The Setup Wizard will install Spotlight Bulk User Insert Wizard on your computer. Click "Next" to continue or "Cancel" to exit the Setup Wizard.

< Back   Next >   Cancel

- Enter a Folder path - it is recommended to install in a folder within the main Spotlight folder. **C:\Blackchair\Software\Spotlight Bulk User Insert Wizard** is the default location
- You can also select **Browse** to locate and select an existing folder path
- Select **Next**

- Select **Install**

Spotlight Bulk User Insert Wizard Setup   ✕

Ready to Install

The Setup Wizard is ready to begin the Spotlight Bulk User Insert Wizard installation

Click "Install" to begin the installation. If you want to review or change any of your
installation settings, click "Back". Click "Cancel" to exit the wizard.

Advanced Installer

< Back   Install   Cancel

- When the wizard is installed, you can choose to view the **Read Me** file and/or launch the **Spotlight Bulk User Insert Wizard** by selecting the relevant check boxes
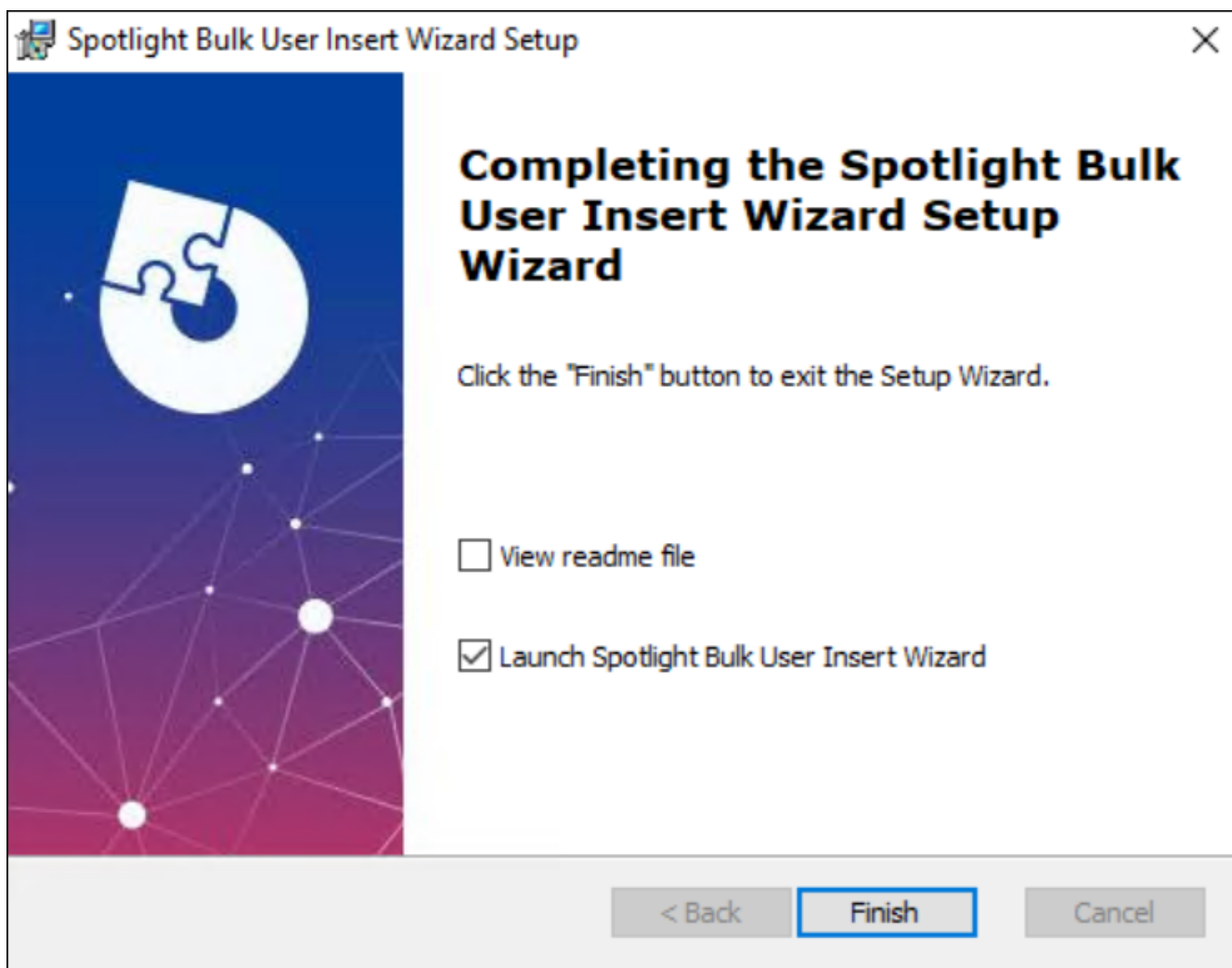
- A short cut to launch the wizard will also be placed on your desktop
- Select **Finish**

NB: The Read Me file contains the version history of the wizard


User Insert Process

To open the wizard:

- Launch after install or
- Select the shortcut on your desktop or
- Double click the **Spotlight Bulk User Insert Wizard** application in the installed location eg **C:\Blackchair\Software\Spotlight Bulk User Insert Wizard**

Welcome

The wizard will guide you the process of adding users in the following areas.

- Set up connection to the Spotlight **slconfig** database
- Load users
    - From a csv file
    - From an existing environment
    - Manually
- Set target environments
- Set user permissions
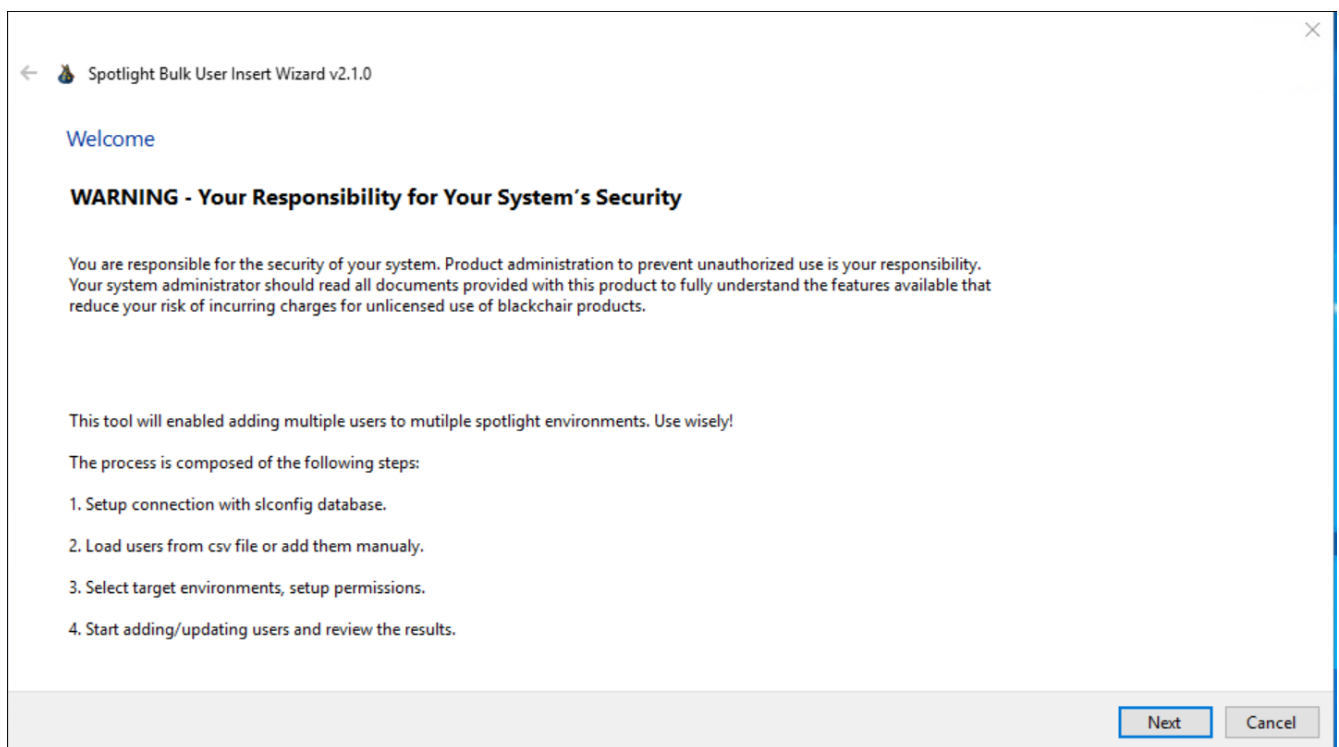
Select "**Next**" to continue

SLConfig Database Connection

Manually adjust the following information in the **SLConfig Database Connection** field:

- **Data Source**
    - the IP or Host name of the db server
- **Initial Catalog**
    - the name of the slconfig db
- **User ID**
    - the username of the spotlight db account
- **Password**
    - the password of the spotlight db account

Alternatively you can instead :

- Select **Setup Connection**

- Select the Data Source Type - **Microsoft SQl Server** or **Oracle Database**
- Select OK

- For **MS SQL - SQL Server Authentication**
    - Enter the Server Name
    - Select **Use SQL Server Authentication**
    - Enter the spotlight db account username and password
    - Select **Save My Password**
    - Select **slconfig**
    - Test the connection
    - Select **OK**

- For **MS SQL - Windows Authentication**
    - Enter the Server Name
    - Select **Use Windows Authentication**
    - Select **slconfig**
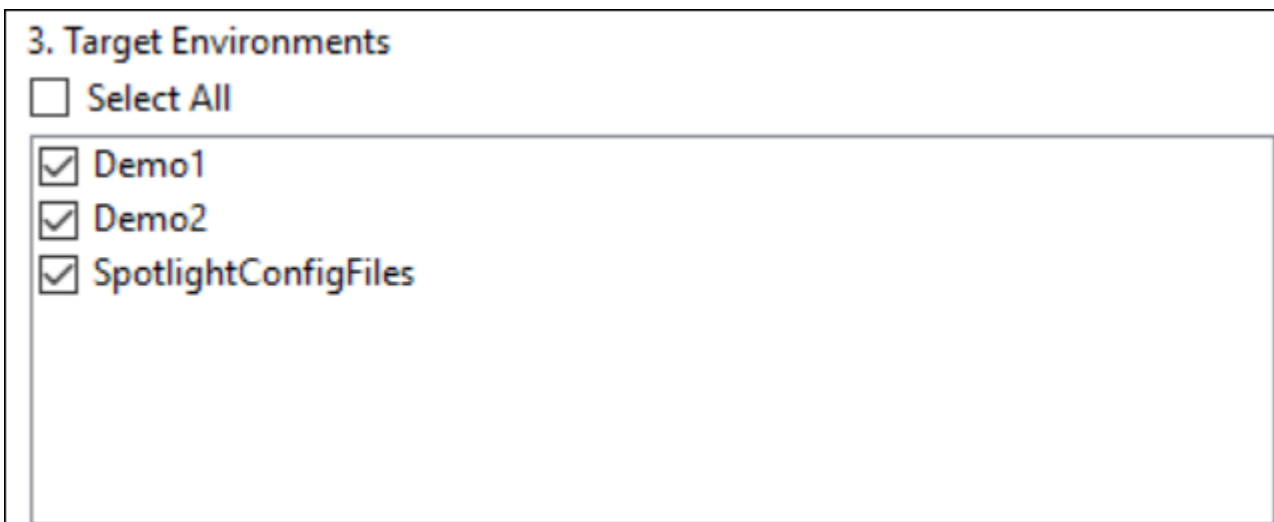   - Test the connection
    - Select **OK**

- For **Oracle**
    - Enter the **Server Name**
    - Enter the slconfig db account username and password provided by the customer
    - Select **Save my Password**
    - Test the connection
    - Select **OK**
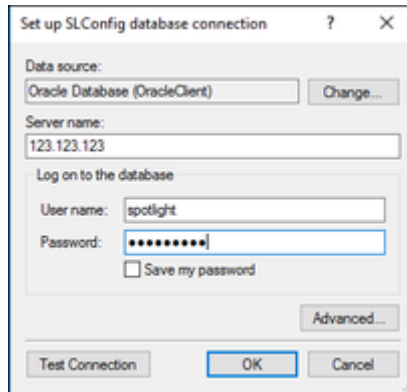
- Next select **Load Environments**

- The list of environments configured in **slconfig** database will now be displayed

Load Users

Users can be loaded into the wizard either through a pre-prepared csv file or from an existing Spotlight environment.

Once the users are loaded, adjustments can still be made to all aspects of the user, including permissions.

Users details can also be exported from an environment to a csv file, which can be utilised to get data user data from a previous Spotlight installation and import into the new installation.

From File

- To import users from a csv file, the file must first be prepared in a specific format. To view the expected format, select the Expected Format button.
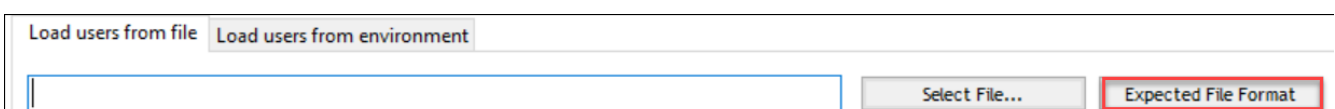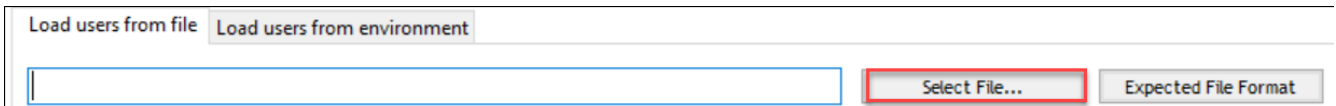
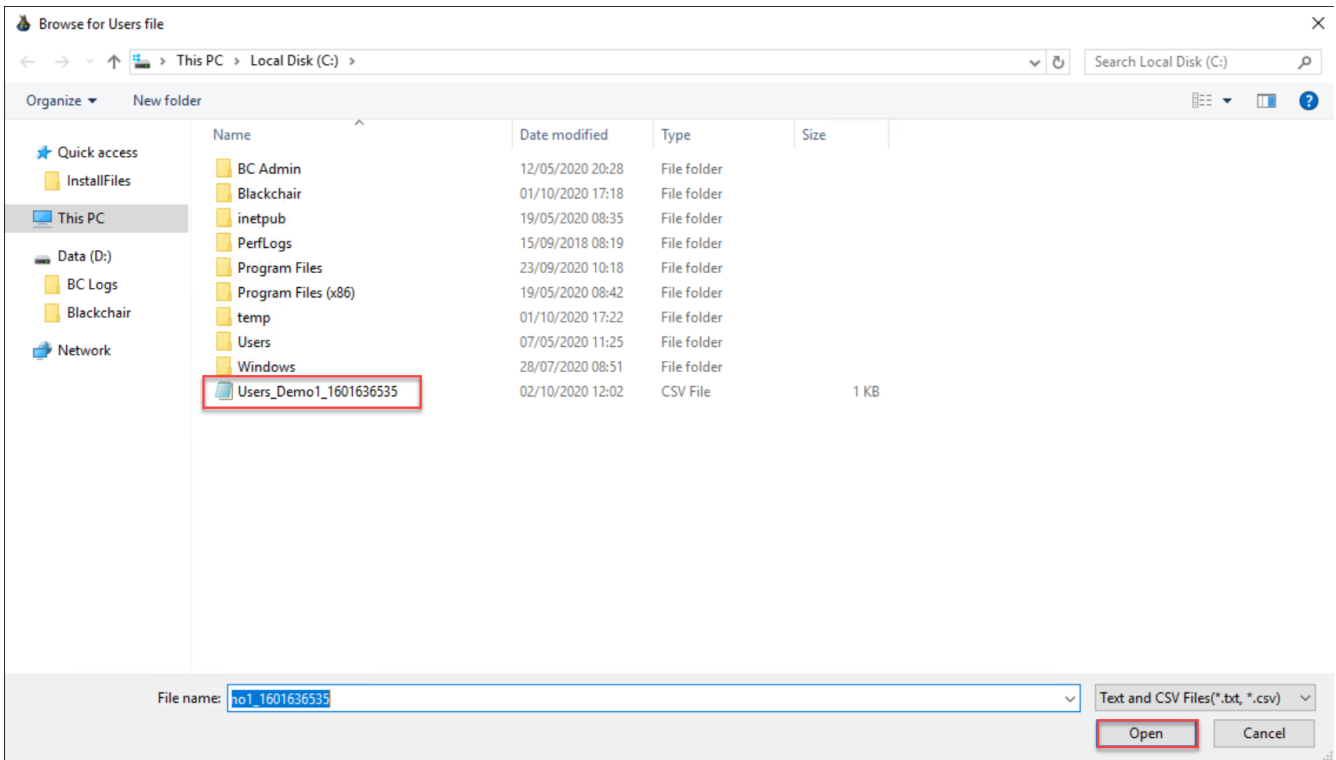- A sample csv file will open
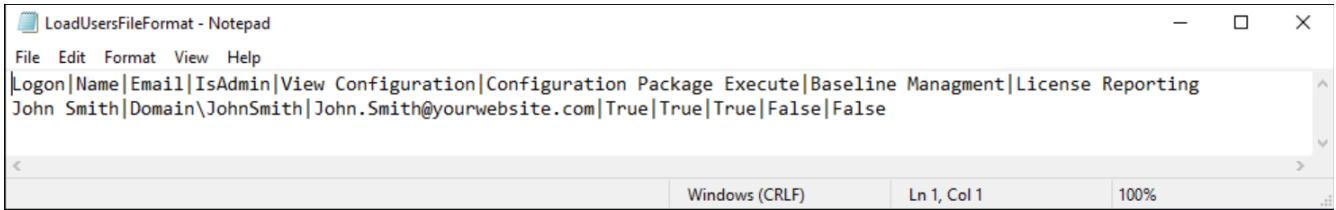
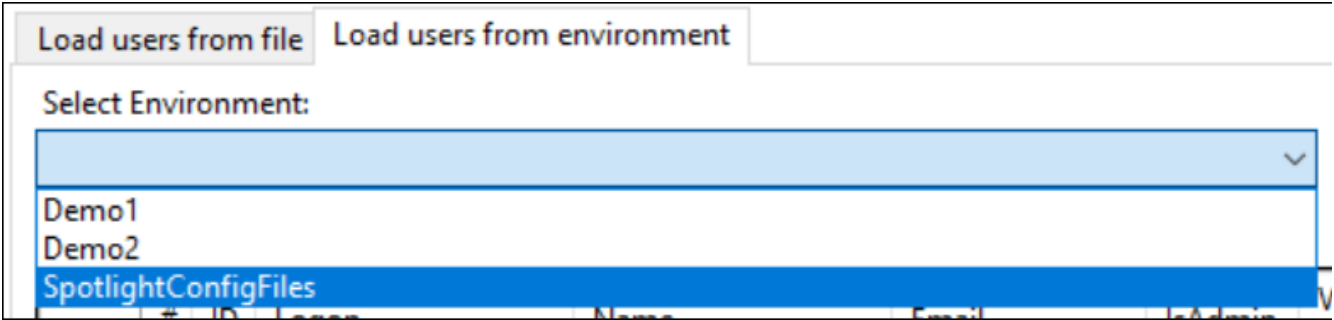To load the csv file:

- Select the **Select File** button

- Browse to the location of the CSV file, select it
- Select **Open**

- A list of users is now displayed

From Environment

- Select the **Load users from environment** tab
- Select the environment from the dropdown

- A list of users is now displayed

Export Users

When users are loaded into the wizard from an environment, these users can then be exported to a CSV file. This is a very useful tool to use when Spotlight was previously installed and there now a fresh install of Spotlight with a new **slconfig**.

To use this tool, you would need to set the **slconfig** connection to the previous **slconfig** database. select Export Users and save the csv file
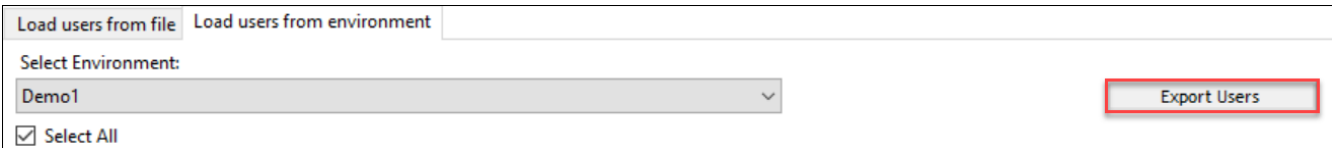

The file can then be used as before using the **Load from File** feature

Users Window

The Users window display all the user either loaded from a CSV or from an existing environment, and can be used to adjust the following values:

- ID
- Login
- Name
- Email
- Is Admin
- Permissions

- The **ID, Login, Name** and **Email** fields are free text fields. To adjust simply alter the current text.
- The **IsAdmin** and **permission** fields are check boxes. To adjust, select or deselect the check boxes as appropriate
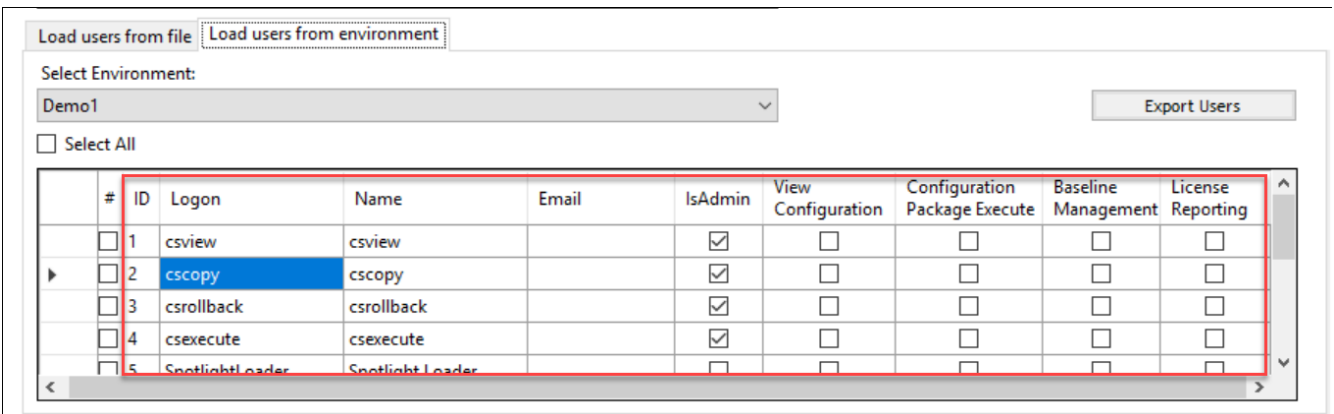
- The ID field is not available when users are loaded from a CSV file. When imported into a target environment, an ID number will be created for each user. When users are loaded from an existing environment, the ID number of the user in that environment is

present. This does not need to be adjusted as the wizard will check if these IDs already exist, and if they do, will increment the new ID number accordingly.

- When users are loaded from a CSV file, the Login field may not include the Domain of the user. This can be added by entering a Domain prefix in the Prefix Users with Domain check box

- When users are loaded from an existing environment additional users and there details can also be added manually. To do so, go to the last cell in the user window and manually enter the required data.

- When users are loaded from an existing environment, you can decide to include/exclude some of these users from the target environments. To select the users, select the **Select All** button, or select individual users using the check box beside each users name

Target Environments

Once the users have been configured the next step is to select which environments the users will be exported to. To select the environments

- Select **Select All** or
- Select the individual environment check boxes

3. Target Environments

☐ Select All

☑ Demo1
☑ Demo2
☑ SpotlightConfigFiles

Permissions

The permissions set in the user window can be overwritten before importing into the target environment. You may wish to do this to save you setting individual permissions and where all users in the user window have the same permissions. To do so:

- Select **Overwrite Permissions**
- Select either **Select All** or the individual permission type check boxes

☑ Overwrite Permissions (when checked individual permissions will be ignored)
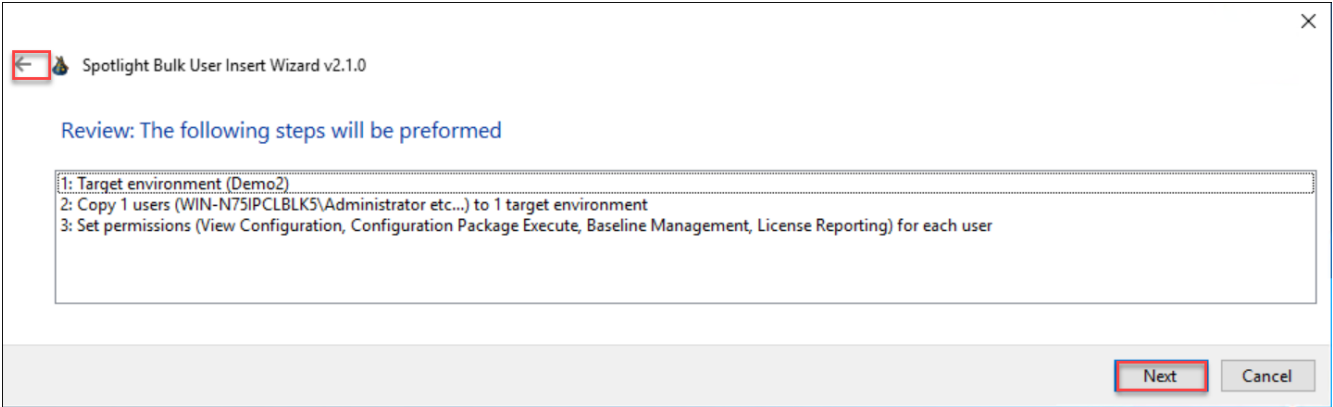☐ Select All

☐ View Configuration
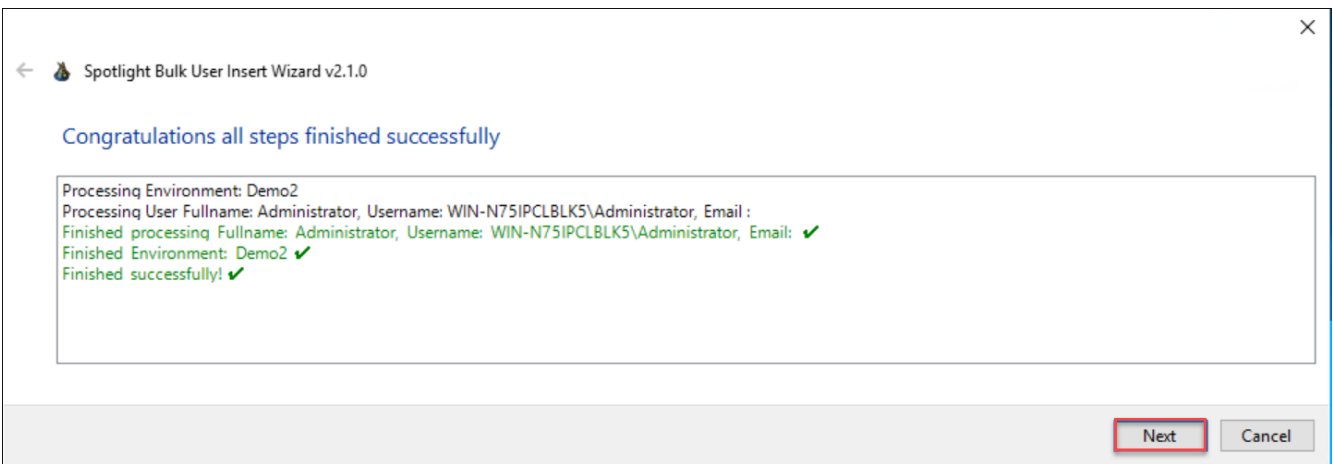☐ Configuration Package Execute
☑ Baseline Management
☑ License Reporting

Finish

- To import the users into the target environment, select **Next**
- Review the steps that will be taken, if correct select **Next**. If any adjustments require to be made, select the **Back** button

- The next screen will indicate if the import was successful, select **Next**

- Finally the last page will allow you to view the import log or go back to the the start-up page