



SmartMsg Guide for Importing Mass Dial Users and Devices

SmartMsg

Secure Notification Software

Additional SmartMsg documentation is available through the Codespear website.

<http://www.codespear.com/helpcentral.asp>

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CODESPEAR

Federal Signal Codespear

370 E. Maple, Suite 350

Birmingham, MI 48009

www.codespear.com

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Documentation V5.2

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Introduction

The SmartMsg Data Import/Export Utility was designed for importing and accessing data from the SmartMsg system. The **Data Import** feature is useful for taking data that already exists in another source and putting it into SmartMsg. It is also useful as an automated way to put in large amounts of information, such as a large number of users/devices, etc. Additionally, the Data Import function is necessary to restore SmartMsg data from a SmartMsg backup. The data import feature permits the import of data into SmartMsg from a variety of data sources such as:

- ODBC sources (Excel, SQL files)
- Delimited flat files (text files, *.csv files)
- SmartMsg Backup file

This document concentrates on the import of data into the Mass Dial Users and Mass Dial Devices tables in SmartMsg. Typically, this type of Import would take place during the deployment of a Citizen or Campus Alerting system.

For instructions on how to import data using the Data Import Export Tool, please see the *SmartMsg Data Import Export Tool Guide*.

Terminology

Mass Dial User – a citizen or student that is part of a Citizen or Campus Alerting system. A table exists in the SmartMsg database for Mass Dial Users.

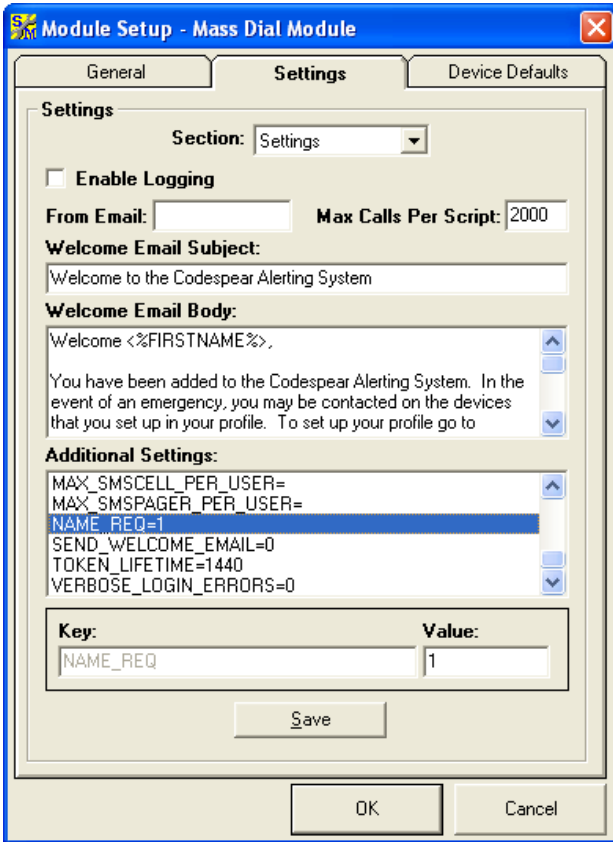
Mass Dial Device – a device belonging to a citizen or student that is part of a Citizen or Campus Alerting system. There are 4 types of Mass Dial Devices – Phone Numbers, SMS Cell Phones, SMS Pagers, and Email Addresses. A table exists in the SmartMsg database for Mass Dial Devices.

Association Group – a group of Mass Dial Users or Mass Dial Devices that is linked to a Citizen or Campus Alert.

Data Source Format

Mass Dial Users Import

For a Mass Dial Users Import, the Data Source must contain fields that can be mapped to specific fields in the SmartMsg database. There must be a field that can be mapped to the User ID field. Other fields will be required depending on the settings within the Mass Dial Module. These settings are located within the Mass Dial module's Settings tab, when the Section "Settings" is chosen from the dropdown menu (see picture below).

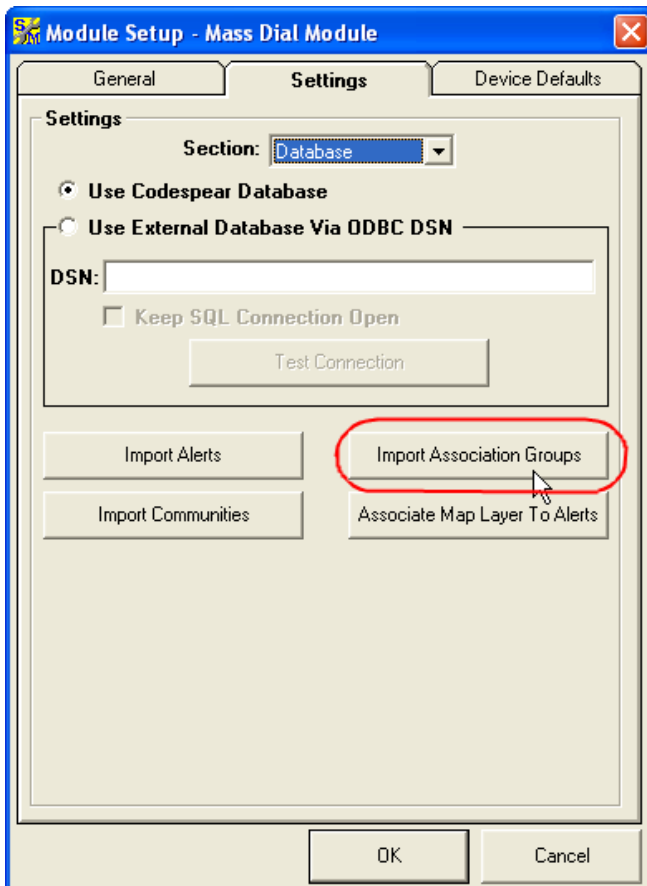


If ALLOW_REG_WITH_NO_ADDRESS_VERIFY=0, the Data Source must contain fields that can be mapped to the SmartMsg fields: **Street Address**, **Street Address 2**, **City** and **Zip**.

If EMAIL_REQ=1, the Data Source must contain a field that can be mapped to the **Email Address** field in the SmartMsg Database. If SEND_WELCOME_EMAIL=1, an email address field is also required. If the setting for ALWAYS_USE_FORGOT_PASSWORD_EMAIL=0, an email address field is also required for import.

If NAME_REQ=1, the Data Source must contain fields that can be mapped to the **First Name** and **Last Name** fields in the SmartMsg Database.

There may also be a field within your Data Source that cannot be mapped until some setup within the Mass Dial Module has taken place. You will not be able to map the **Data Source** field until you have imported Association Groups within the Mass Dial Module (see picture below). Instructions on how to import Association Groups are contained in the document *Citizen or Campus Alerting Web Portal Setup*.



Mass Dial Devices

For a Mass Dial Devices Import, the Data Source must contain fields that can be mapped to specific fields in the SmartMsg database. There must be fields that can be mapped to the User ID, Device Code, Device Data, and Device Name fields.

There may also be a field within your Data Source that cannot be mapped until some setup within the Mass Dial Module has taken place. You will not be able to map the **Data Source Code** field until you have imported Association Groups within the Mass Dial Module (see picture above). Instructions on how to import Association Groups are contained in the document *Citizen or Campus Alerting Web Portal Setup*.

A complete list of available SmartMsg database fields that can be mapped to your Data Source is in the next section.

Mass Dial Fields for Import

Mass Dial Users

User ID – the login username for a citizen or student.

Email Address (Required depending upon setting(s) in Mass Dial Module) – the email address where the citizen or student will be sent their login information, once they are imported (if SEND_WELCOME_EMAIL=1 in the Mass Dial Module settings). It is also the email address that may be used in the event that the user forgot their password (if EMAIL_REQ=1 and ALWAYS_USE_FORGOT_PASSWORD_EMAIL=0 in the Mass Dial Module settings).

Password – the login password for the citizen or student. To have a password randomly generated by the SmartMsg system, enter <%GENPWD%>.

First Name (Required depending on setting in Mass Dial Module) – first name of the citizen or student.

Last Name (Required depending on setting in Mass Dial Module) – last name of the citizen or student.

Street Address (Required depending on setting in Mass Dial Module) – street address of the citizen or student.*

Street Address 2 (Required depending on setting in Mass Dial Module) – additional line for street address of the citizen or student (commonly used for apartment number, building info, etc.).*

City (Required depending on setting in Mass Dial Module) – the city where the citizen or student resides.*

Zip (Required depending on setting in Mass Dial Module) – the zip code of the area where the citizen or student resides.*

Latitude – the latitude coordinate of the citizen or student's address. These fields should not be mapped unless doing a backup.

Longitude – the longitude coordinate of the citizen or student's address. These fields should not be mapped unless doing a backup

Verified – indicates if the address information is verified by the GIS engine. You will not need to map this field, it is used for backup purposes.

Activated – indicates if the user account is activated. You will not need to map this field, it is used for backup purposes.

Data Source – determines if this Mass Dial User is included in a previously imported Association Group. The Data Source should match with an Association Group that was imported in the Mass Dial Module.

OptOut – indicates whether the citizen or student is opted out or opted in. 0=Opt In, 1=Opt Out, blank is the equivalent to 0 (Opt In).

Password Hash – for backup purposes only, you shouldn't have to map this field.

Password Hash (Upper Case) – for backup purposes only, you shouldn't have to map this field.

Unique ID – the unique identifier for the citizen or student. This is typically used for resynchs when changes are made to user information. If you choose not to import Unique IDs, users will be assigned Unique IDs based upon their First Name, Last Name, and Street Address. It is best to import your own Unique IDs.

Auto Purge Date – determines the date that the user account will be deleted from the database.

*The address information (Street Address, Street Address 2, City, and Zip) will be verified by the GIS database in place if the setting in the Mass Dial module for ALLOW_REG_WITH_NO_ADDRESS_VERIFY=0. If it is set to 1, the address does not need to be verified.

Mass Dial Devices

User ID – the login username for a citizen or student. This will match the user account information to the device information.

Data Source Code – the association group or list of association groups (delimited by a semi-colon) that this device shall be a part of. The association group is linked to an alert – therefore, devices put into association groups will not be able to unsubscribe from that alert.

Device Code (Required) – 3 letter code that describes the type of device. 4 possible values – SCL, SMP, PHN, EML. SCL = SMS Cellphone, SMP= SMS Pager, PHN= Phone Number device, EML = Email address.

Device Data (Required) – the device information (i.e. phone number, SMS provider, email address). Format varies per device code:

For device codes SCL and SMP, the device data field format is: CCM=*provider* &PH=*phonenumber*. *Provider* is the Cell phone or Pager provider name, and *PhoneNumber* is the number dialed.

For device code PHN, the device data field format is: PH=*phonenumber*.
Phonenumber is the number dialed.

For device code EML, the device data field format is: TEA=*emailaddress*.
Emailaddress is the email address of the recipient.

Device Enabled – determines whether or not the device will be sent alerts. The user can modify this setting in their profile. A 1 indicates the device is enabled, a 0 indicates the device is disabled.

Device Name (Required) – the “friendly name” of the device. This is what the user will see when they go to the Device Manager page. For example, “David’s email address”.

Unique ID – use this field if you are importing without User IDs (login usernames). Unique IDs can then be used to match the device with the previously imported Mass Dial User’s Unique ID.

If you do not import a User ID or a Unique ID, you will need to import the next 5 fields below. These fields will be used to associate the devices to a previously imported user.

User First Name – first name of the user who owns this device.

User Last Name – last name of the user who owns this device.

Street Address 1 – first line of the street address of the user who owns this device.

Street Address 2 – second line of the street address of the user who owns this device.

Zip Code – zip code of the user who owns this device.

Importing Mass Dial Users and Devices

Mass Dial Users

1. Create and format the Data Source using the information in the previous sections to guide you.
2. Open the SmartMsg Data Import Export Utility. You must be a Global Administrator to login to this program.
3. Click the **Import** button.
4. Choose your Data Source type: **ODBC Source**, **Flat File**, or **SmartMsg Backup File**. For more information on these options, see the *SmartMsg Data Import Export Guide*.
5. Click the **Retrieve Data** button.
6. Click the **Data Type** dropdown and select **8. Mass Dial Users**.
7. Map the desired fields in your Data Source to SmartMsg fields. Any data you want to import must be mapped. If you do not map a field, it will not be imported.
8. Click the **Start Import** button.

Mass Dial Devices

1. Create and format the Data Source using the information in the previous sections to guide you.
2. Open the SmartMsg Data Import Export Utility. You must be a Global Administrator to login to this program.
3. Click the **Import** button.
4. Choose your Data Source type: **ODBC Source**, **Flat File**, or **SmartMsg Backup File**. For more information on these options, see the *SmartMsg Data Import Export Guide*.
5. Click the **Retrieve Data** button.
6. Click the **Data Type** dropdown and select **9. Mass Dial Devices**.
7. Map the desired fields in your Data Source to SmartMsg fields. Any data you want to import must be mapped. If you do not map a field, it will not be imported.
8. Click the **Start Import** button.

For more information please see the *SmartMsg Data Import Export Utility Guide*.