

# CSV Member Upload

## CSV Member Upload

There are two options supported when utilizing CSV uploads to gate content within Virtual Y.

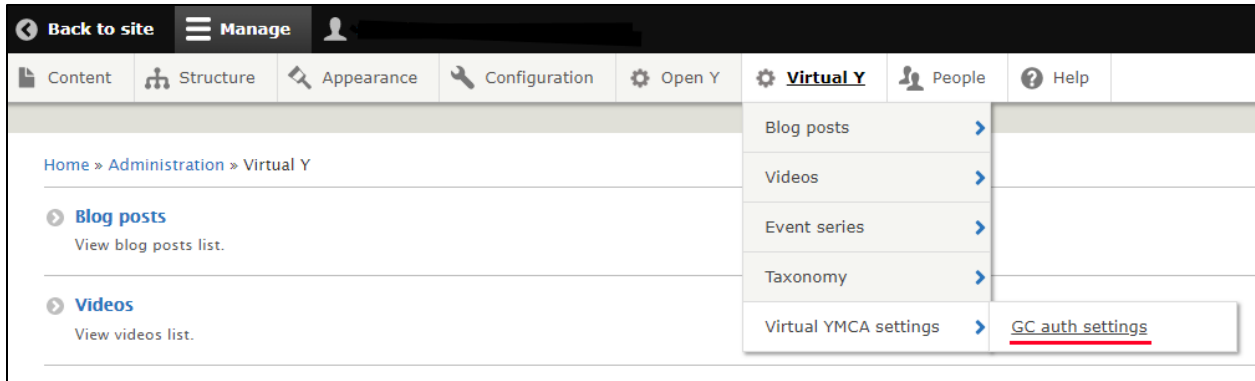
- 1) No Email Verification
- 2) Email Verification

The below steps outline what is needed to upload the CSV file, make minor adjustments to the functionality, and the steps the members will go through to gain access to the site.

**NOTE: Administrators and Staff users should always be added to the Virtual Y site prior to importing Virtual Y members using this process, using the Administration > People page. Additionally, Administrators and Staff users should not be added to the CSV member file and should not be assigned the roles "Virtual YMCA", "Virtual YMCA Trial", or "Virtual YMCA Premium", as these are reserved for Members.**

## CSV Member Upload Setup Steps

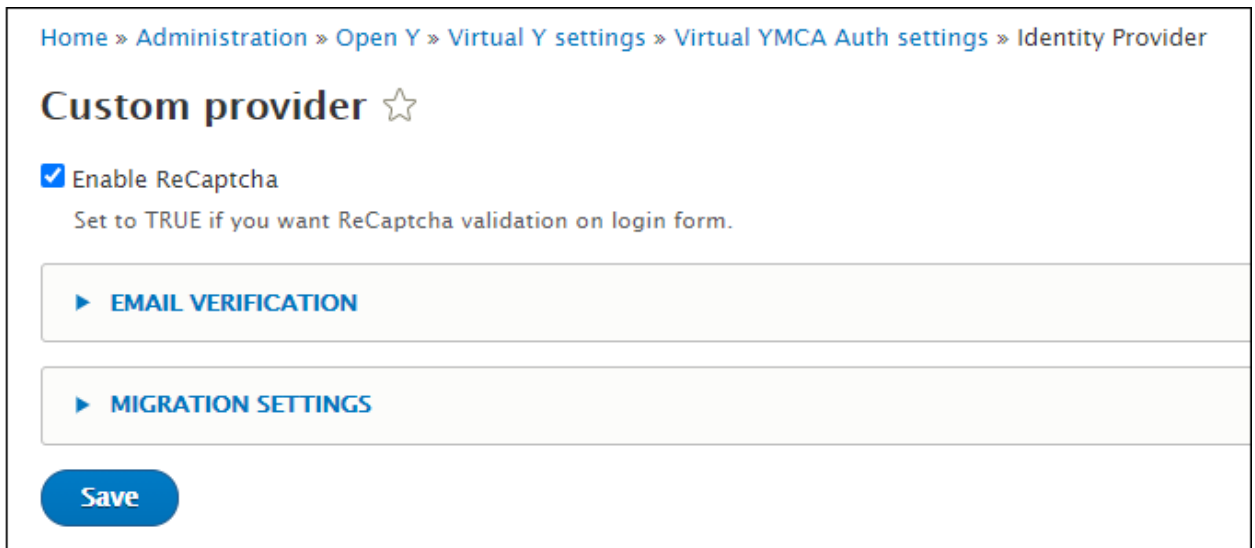
- 1) Extract a member file from your CRM system
  - a. The file must contain a **header row** designated the columns
  - b. All values in the file are to be **comma delimited**, including the header row
  - c. Each member record **should be on its own line**
  - d. The name of the CSV must be **"gc\_auth\_custom\_users.csv"**
  - e. Columns to include
    - i. Member ID
    - ii. Member First Name
    - iii. Primary Member
    - iv. Member Email
    - v. Package Name
    - vi. Package Site
  - f. Please see a sample CSV here:  
<https://ycloud.y.org/sites/virtual.y.org/files/2020-08/Virtual-Y-Member-CSV-File-Example.csv>
- 2) Navigate to your Virtual Y website and log into the admin section
- 3) Navigate to the CSV Upload Section by
  - a. Clicking the **"Manage"** link in the top left of the site then hovering over **Virtual Y, Virtual YMCA Settings**, and finally **GC Auth Settings**.



b. Click “Edit” on the **Custom provider** row

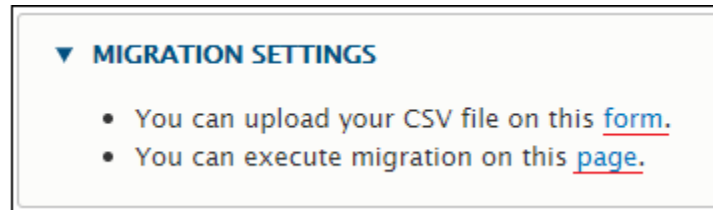
ACTIVE	NAME	ACTION
<input checked="" type="checkbox"/>	Custom provider	<a href="#">Edit</a>

4) You will see the custom provider screen where you may set several options related to the CSV upload option. On this screen you may perform the following in addition to the upload action.



- a. Enable ReCaptcha
- b. Enable email verification
  - i. This option will require members to log into their email and click a link to gain access to the Virtual Y’s gated content. This member must do this every time they log into the site.
  - ii. If enable, you may set the following values as well
    1. Length of time the login link is valid for
    2. The email verification text


3. The verification message displayed to the screen upon submitting the log in form
- c. Migration Settings
- i. This expandable section provides links allowing
    1. Upload of a new CSV file by clicking the **“form”** link.
    2. Executing a migration based on the uploaded CSV file by clicking the **“page”** link.



- 5) To upload a new CSV file
- a. Click the **“form”** link from Migration Settings.
  - b. A new browser tab opens, showing the current CSV file in the system if it already exists, a Remove button, and a Submit button.
  - c. Before the new CSV file can be uploaded, the file currently saved must be removed from the system by clicking the **“Remove”** button

[Home](#) » [Administration](#) » [Open Y](#) » Upload CSV

**CSV file**

 [gc\\_auth\\_custom\\_users.csv](#)

[Remove](#)

CSV file to import.

[Submit](#)

- d. With the old CSV file removed, now browse to find the updated CSV by clicking the **“Choose File”** button.

[Home](#) » [Administration](#) » [Open Y](#) » Upload CSV

**CSV file**

[Choose File](#) No file chosen

CSV file to import.

[Submit](#)

- e. With the new CSV file picked, click the **“Submit”** button to complete the file upload process.

[Home](#) » [Administration](#) » [Open Y](#) » [Upload CSV](#)

### CSV file

 [gc\\_auth\\_custom\\_users.csv](#)

[Remove](#)

CSV file to import.

[Submit](#)

- 6) To execute the **CSV migration** process please follow these steps.
  - a. Click the **“page”** link from Migration Settings.
  - b. A new browser tab opens, showing the migration options available.

[Home](#) » [Administration](#) » [Structure](#) » [Migrations](#) » [Edit migration group](#) » [Migrations](#) » [Migration overview](#) » [Execute migration](#)

**Operation \***

**Import**  
Imports all previously unprocessed records from the source, plus any records marked for update, into destination Drupal objects.

**Rollback**  
Deletes all Drupal objects created by the import.

**Stop**  
Cleanly interrupts any import or rollback processes that may currently be running.

**Reset**  
Sometimes a process may fail to stop cleanly, and be left stuck in an Importing or Rolling Back status. Choose Reset to clear the status and permit other operations to proceed.

Choose an operation to run.

**▼ ADDITIONAL EXECUTION OPTIONS**

**Update**  
Check this box to update all previously-imported content in addition to importing new content. Leave unchecked to only import new content

**Sync**  
Check this box to sync (delete missed in source) all previously-imported content in addition to importing new content. Leave unchecked to only import new content

**Ignore dependencies**  
Check this box to ignore dependencies when running imports - all tasks will run whether or not their dependent tasks have completed.

**Limit to:**  
  
Set a limit of how many items to process for each migration task.

[Execute](#)

- c. Leave the **“Import”** option selected.
- d. Expand the **“Additional Execution Options”** area to show the options **“Update”**, **“Sync”**, and **“Ignore Dependencies”**.
- e. Select the **“Import”** operation, and from **“Additional Execution Options”** select **“Sync”**. This will ensure that member updates present in the CSV file will also be picked up by the migration process and reflected in the Virtual Y site. Also, cancelled members will result in those members’ rows removed from the CSV file. The **“Sync”** setting will delete those cancelled members’ accounts from the Virtual Y site.
- f. Click the **“Execute”** button.
- g. A progress bar displays indicating the migration is working.

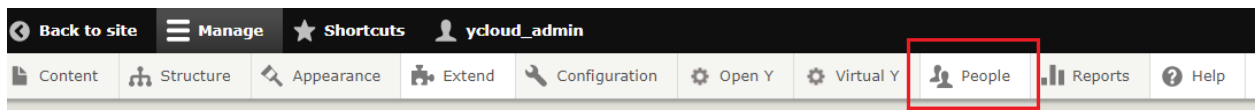
## Migrating *Import Customers* ☆

### Migrating *Import Customers*

- h. Once complete, a green status message will be displayed showing the number of members created, updated, failed, or ignored.

✓ Processed 4 items (4 created, 0 updated, 0 failed, 0 ignored) – done with 'gc\_auth\_custom\_users'

- i. You may view the entire member list by clicking on the **People** menu item in the Administration menu bar.



- j. Members in the list, displayed as users with the “Virtual YMCA” role, may now log into the site.

### Member Experience


When accessing your Virtual Y website the member will perform the following actions to access your gated content.

- 1) Navigate to your Virtual Y website

HOME BLOGS VIDEOS LIVE STREAMS VIRTUAL MEETINGS

## Sign In

Email Address

I'm not a robot  reCAPTCHA  
Privacy - Terms

**LOGIN**

- 2) Enter their **email address** and click **submit**
- a. If your association **is not using** email verification, the member would gain access to the gated content immediately if the email entered matches that of an email on the uploaded CSV Member File.
  - b. If your association **is using** email verification, the following would occur
    - i. The member receives an email to their email address
    - ii. The member clicks the link provided in the email and is redirected back to the Virtual Y site with access to the gated content granted.