

Membership Populator Technical Guide

PolicyHub All Versions

Chapter 1: CSV Import Process

Overview

Introduction

An alternative to using the **Active Directory** synchronisation to populate PolicyHub with users and groups, **CSV** files can be implemented. There are three ways these files can be populated with the details:

- Using the PolicyHub Membership Populator Service
- Manual administration
- Automatic creation by another system (e.g. HR system)

The CSV files can also be used in conjunction with the **Active Directory** synchronisation to create and populate additional groups which are not available in the customer's Active Directory.

Membership Populator

Automate

The Membership Populator Service can be installed on an internal Client system and is used to automate the creation of the User / Group CSV files for import into PolicyHub.

The service communicates with the Client's **Active Directory** and outputs the results to **CSV** files ready for the daily sync process to import them into PolicyHub.

Membership Populator CSV Data Gatherer

The Membership Populator CSV Data Gatherer is a plugin for the Membership Populator which reads users, groups and their membership from a set of flat files.

The gatherer requires four CSV files containing the values for the users groups and links. Each value in the file is separated by a comma (without extra spaces) by default. Each row is separated by a newline character:

CSV Files

User CSV File

This file contains the values for each user. The file should contain the following values for each user row:

- LoginName
- EmailAddress
- Forename (optional)
- MiddleName (optional)
- Surname (optional)
- Description (optional)
- DisplayName (optional)
- UserId (mandatory)

```
Users.csv X
1 //LoginName,EmailAddress,Forename,MiddleName,Surname,Description,DisplayName,UserId
2 Harry,Harry@training.not,Harry,,Enfield,,Harry Enfield,36EC47E4-5CDE-4C81-B858-96F953DCCE75
3 Helen,Helen@training.not,Helen,,Mirren,,Helen Mirren,96066981-522A-4909-89D8-58D6D1E3ADDO
4 Mick,Mick@training.not,Mick,,Jagger,,Mick Jagger,4C0B8C99-1498-4D78-A979-2903CFAE6AC5
5 Mike,Mike@training.not,Mike,,Rutherford,,Mike Rutherford,11D27715-E25D-4DD1-86F9-55429196F7DF
6 Oliver,Oliver@training.not,Oliver,,Reed,,Oliver Reed,D3B7DDA5-A9BA-4BFF-8A16-EDC4D93DAD04
7 Owen,Owen@training.not,Owen,,Wilson,,Owen Wilson,D712005F-4E68-4C27-B5FE-CD86F813C9DD
8 Steve,Steve@training.not,Steve,,McQueen,,Steve McQueen,0541F5EC-B723-445F-ACFA-7E4616D3BEF7
9 Stevie,Stevie@training.not,Stevie,,Wonder,,Stevie Wonder,4F0A2AA1-3229-43FD-B321-1FCD16674E6F
10 Student,Student@training.not,Student,,,,,Student,E84FDF59-EC0B-48DF-A643-59DC8A334D43
```

Group CSV File

This file contains the values for each group. The file should contain the following values for each group row:

- GroupName
- DisplayName (optional)
- Description (optional)
- GroupId (mandatory)

```
Groups.csv X
1 // GroupName,DisplayName,Description,GroupId
2 Administrators,Administrators,Administrators,94D56F9E-A4E0-4F91-B010-668DF77CA785
3 Supervisors,Supervisors,Supervisors,27713CF9-243F-4DDC-9B2F-74CF448413A0
4 Managers,Managers,Managers,008D5411-49A2-4B42-8591-2AA1EB8B8F0E
5 Operators,Operators,Operators,A44631BA-893D-4E1D-90C4-D453A0911D78
6 HR,HR,HR,1A9F9077-A004-4B60-AE8E-620B59917D14
7 Admin,Admin,Admin,91E5C458-AFDD-476A-8FC9-D668DBC2265
8 Operations,Operations,Operations,66511C29-A533-43D7-9536-7EA8B14BCFDB
```

Group Membership CSV File

This file contains the relationships between the users and groups. Each row contains two values

- Parent Group ID
- Child Group ID

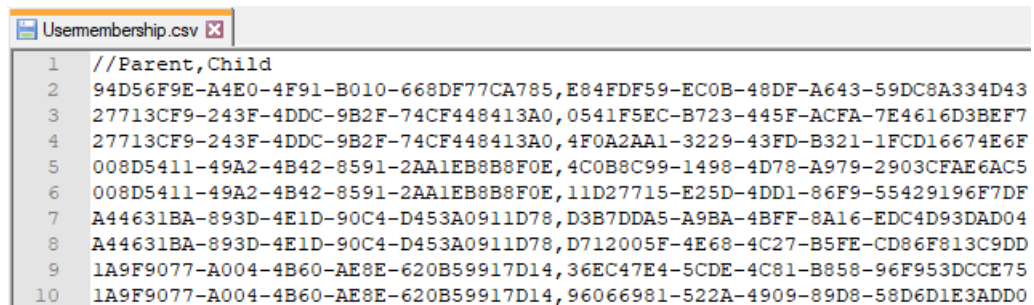
```
Groupmembership.csv X
1 //Parent,Child
2 91E5C458-AFDD-476A-8FC9-D668DBC2265,94D56F9E-A4E0-4F91-B010-668DF77CA785
3 91E5C458-AFDD-476A-8FC9-D668DBC2265,1A9F9077-A004-4B60-AE8E-620B59917D14
4 66511C29-A533-43D7-9536-7EA8B14BCFDB,27713CF9-243F-4DDC-9B2F-74CF448413A0
5 66511C29-A533-43D7-9536-7EA8B14BCFDB,008D5411-49A2-4B42-8591-2AA1EB8B8F0E
6 66511C29-A533-43D7-9536-7EA8B14BCFDB,A44631BA-893D-4E1D-90C4-D453A0911D78
```

CSV Files (cont.)

User Membership CSV File

This file contains the relationships between the users and groups. Each row contains two values:

- Parent Group ID
- Child User ID



```
1 //Parent,Child
2 94D56F9E-A4E0-4F91-B010-668DF77CA785,E84FDF59-EC0B-48DF-A643-59DC8A334D43
3 27713CF9-243F-4DDC-9B2F-74CF448413A0,0541F5EC-B723-445F-ACFA-7E4616D3BEF7
4 27713CF9-243F-4DDC-9B2F-74CF448413A0,4F0A2AA1-3229-43FD-B321-1FCD16674E6F
5 008D5411-49A2-4B42-8591-2AA1EB8B8F0E,4C0B8C99-1498-4D78-A979-2903CFAE6AC5
6 008D5411-49A2-4B42-8591-2AA1EB8B8F0E,11D27715-E25D-4DD1-86F9-55429196F7DF
7 A44631BA-893D-4E1D-90C4-D453A0911D78,D3B7DDA5-A9BA-4BFF-8A16-EDC4D93DAD04
8 A44631BA-893D-4E1D-90C4-D453A0911D78,D712005F-4E68-4C27-B5FE-CD86F813C9DD
9 1A9F9077-A004-4B60-AE8E-620B59917D14,36EC47E4-5CDE-4C81-B858-96F953DCCE75
10 1A9F9077-A004-4B60-AE8E-620B59917D14,96066981-522A-4909-89D8-58D6D1E3ADD0
```