



## I/O TASK GUIDE

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### 1 Using Connector

Using connector consists in three main steps:

- Setting up the read connector
- Setting up the write connector
- Creating the task that couples the read and the write connector.

A read connector is a connector that reads from an external csv file or from forma.lms database

A write connector is a connector that writes to a csv file or to forma.lms database. The number of output and input fields depends from the connector you select; anyway during the task setup you can choose how many of them to use.

Here is the list of forma.lms connectors and their purpose:

#	Connector name	Purpose	Input data	Output data	Note
1	course-export-connector	Export a list of course on a CSV file	-	code name description lang_code status subscribe_method mediumTime permCloseLO difficult show_progress show_time show_extra_info show_rules date_begin	Look at chapter 7

				date_end valid_time max_num_subscribe min_num_subscribe selling prize create_date idCourse	
2	course-report-connector	Export a report describing course usage statistics	-	code name Enrolled_number No_begin No_begin_perc Begin Begin_perc End_course End_course_perc Time_in_course	
3	cvcs-connector	Used with other connectors, it inputs or outputs data depending on use	Depends on the needed output data	Depends on the needed output data	Look at the next chapters
4	docebo-admin	Assigns an admin role to selected users	Type Profile User Folder Course_catalogue Course_path	-	Look at chapter 4
5	docebo-courses	Insert/update a list of course	code name description lang_code status subscribed_method permCloseLO difficult sho_progress show_tim show_extra_info show_rules date_begin date_end valid_time max_num_subscribe selling prize course_type course_edition	-	<b>Check the field you want to be used as record-key</b>
6	docebo-courseuser	Export a list of user and courses results (essential data) Enroll a list of users to courses	Code Userid Level Date_subscription Last_finish	Code Userid Level Date_subscription Last_finish	
7	docebo-orgchart	Create an organization chart	Used with xmlorgchart-connector		Look at chapter 5

8	docebo-users	Import/update or export a list of users	Username Firstname Lastname Password email <custom fields>	Username Firstname Lastname Password email <custom fields>	<b>Check the field you want to be used as record-key</b>  Look at chapter 6
9	sap-user-report-connector	Export a list of users and courses result adding a custom field which can maps SAP cid	-	Userid cid cod_course completion year	
10	user-report-connector	Export a list of user and courses results	-	Id_user Login User_name Id_course Category Code Course Course_status Subscribe_date Begin_date Complete_date User_stauts score	
12	xmlorgchart-connector	Read an organization chart	Read an xml file describing an organization chart	Used with docebo-orgchart connector	Look at chapter 5

## 2 Using CVS Connector for data input

Create a cvs file with the desired input header, and a sample input data like this:

```
My_input1,My_input2, My_input3, My_input4,My_input5
exampledata1,exampledata2,exampledata3,exampledata4,exampledata5
```

Save it into the files/common/iofiles/myinputfile.csv. This file will be used as a “template” input file.

During the connector setup, choose:

- Access: Read
- File pattern: insert the name of the input file (myinputfile.csv in this example)
- Fields definition mode: From Example
- Field delimiter: choose the same field delimiter you used in the input file (comma in this example)
- Enclosure character: nothing in this example
- First row header: yes

Clicking Next, the platform reads and interprets the input file according your input. Complete the setup clicking on Finish button.

Now you can use this connector as input data into forma.lms database.

### 3 Using CVS Connector for data output

In this case, differently from CVS input there is no need to prepare a “template” file.

- Access: Write
- File pattern: insert the output name
- Fields definition mode: manual
- Choose field delimiter: choose your field delimiter (comma for example)
- Enclosure character: choose your field character (even nothing is ok)

Click Next.

On Fields definition, add as many fields as you need; indeed the number of fields depends on the input connector you choose (look at table in chapter 1). In any case during the task setup you can select just a subset of the output fields

### 4 Using the docebo-admin connector

In the docebo-admin you can add administrator to forma.lms; use the input data as follows

- Type: admin -> **this is a fixed value**
- Profile: you can choose whatever admin profile already defined in forma.lms
- User: the user login
- Folder: the org-chart node for which the user will be administrator (**insert root for admin at root level**)
- Course\_catalogue: the course catalogue to associate to the administrator
- Course\_path: the course path to associate to the administrator

Pay attention that the connector deletes possible previous admin profile owned by the user and associates the new one. Moreover you can choose to associate the course catalogue or the course path. You cannot associate both.

### 5 Using docebo-orgchart and xmlorgchart-connector for importing an org chart

- 1) In **connectors tab** make sure the xmlorgchart-connector and docebo-orgchart connectors are available, otherwise add them through the “create” button
- 2) In **connections tab** create a new connection using the xmlorgchart-connector

## Connection

New connection

**Name**

XML ORG Reader

**Description**

**Access**

Read

Write

**File pattern**

my\_organization.xml

Finish

Cancel

Create a new connections using the docebo-orgchart connector like the following example

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### Connection

New connection

**Name**

**Description**

**Access**  
 Read  
 Write  
 Read/Write  
 Don't delete

**Removed folders**  
 Don't delete  
 Delete

**Language**

Next Cancel

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- 3) Select the root or whatever org-chart node in the next step and then click on “finish” button.
- 4) In **Task Tab** create a new task like the following picture, using the previous created connections

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### Tasks

New task

**Name**

**Description**

**Source**

**Destination**

Next Cancel

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- 5) Follow the wizard for setting the required schedule time and then click “finish”

- 6) Put in the /files/common/iofiles the my\_organization.xml file with a structure like this:

```
<?xml version='1.0' encoding='iso-8859-1'?>  
<tree>  
<folder name="Node1" code="1">
```

```
</folder>
<folder name="Node2" code="code2">
</folder>
<folder name="Node3" code="code3">
<folder name="Node31" code="">
</folder>
<folder name="Node32" code="">
</folder>
</folder>
</tree>
```

7) For testing purpose, from the task table run the task

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**N.B. only in the formalms 2.0 and next the code attributes in the XML is processed**

## 6 Using docebo-users connector for importing users

- 1) In **connectors tab** make sure the csv-connector and docebo-users connector are available
- 2) Create a importUser.csv files containing text like the following. In case you have define custom fields, you can include them in your input csv file. Put it into the files/common/iofiles/ folder.

```
username;firstname;lastname;password;email;code;id-emp
hufm87;iezs54;vfom27;fsym23;hufm87.iezs54@vfom27.it;ijif04;2702
kelv21;ozrg53;rxzm23;wine75;kelv21.ozrg53@rxzm23.it;lkiz45;5627
yvmy51;fukw74;sltp85;khtl24;yvmy51.fukw74@sltp85.it;uwyh42;6852
jjiz23;fxfj13;illy83;ngyw38;jizr23.fxfj13@illy83.it;qjwz88;6673
qfzg02;lklk36;rupe76;sgig11;qfzg02.lklk36@rupe76.it;vqtl21;8272
```

- 3) In connections tab create a new **read** connection using the CVS connector like explained in chapter 2. Name the connection “Read user from CVS”.
- 4) Set up the docebo-users connector according your need in “Connections tab”, paying attention to enable the **“write”** Access. Click Next and choose the destination node.

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### Connection

New connection

Name

Description

Access  Read  Write  Read/Write

Send notify  Send  Don't send

Canceled users  Suspended  Delete

File pattern

Require a change of password upon the next log in  No  Yes  Server configuration  Do nothing

Next Cancel

- 5) Create the task for running the batch job as in the following picture using the previous created connector

The screenshot shows the 'New task' form in the form.lms interface. The form fields are:

- Name:** Import Users
- Description:** (empty)
- Source:** Read user from CVS
- Destination:** Import Users from CVS

Buttons: Next, Cancel

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## Tasks

New task

**Name** Import Users

Import schema

User nar	Firstnar	Last Nar	Passwor	Email	code	id-er
username	firstname	lastname	password	email	code	id-emp
hufm87	iezs54	vfom27	fsym23	hufm87.iezs54@vfom27.it	ijif04	2702
kelv21	ozrg53	rxzm23	wine75	kelv21.ozrg53@rxzm23.it	lkiz45	5627
yvmy51	fukw74	sltp85	khtl24	yvmy51.fukw74@sltp85.it	uwyh42	6852
jjzr23	fxfj13	illy83	ngyw38	jjzr23.fxfj13@illy83.it	qjwz88	6673
qfzg02	lklk36	rupe76	sgig11	qfzg02.lklk36@rupe76.it	vqtl21	8272
jjri32	nrpu65	hsyk73	yqry77	jjri32.nrpu65@hsyk73.it	kgzx88	7061
pumv86	yefl42	fntu37	yqit02	pumv86.yefl42@fntu37.it	mvr05	6352
ewqp58	vukv12	gfzi24	jjvp04	ewqp58.vukv12@gfzi24.it	lhfu47	8764
srgm02	rxve11	kquj88	pxuo31	srgm02.rxve11@kquj88.it	qroe43	0836
ygrm43	efnq76	vnxg70	gzfv34	ygrm43.efnq76@vnxg70.it	wlkr41	6152

Previous Next Cancel

- 6) Once you complete the task setup it will be listed in the tasks list. Click on the blue button to verify the new created task

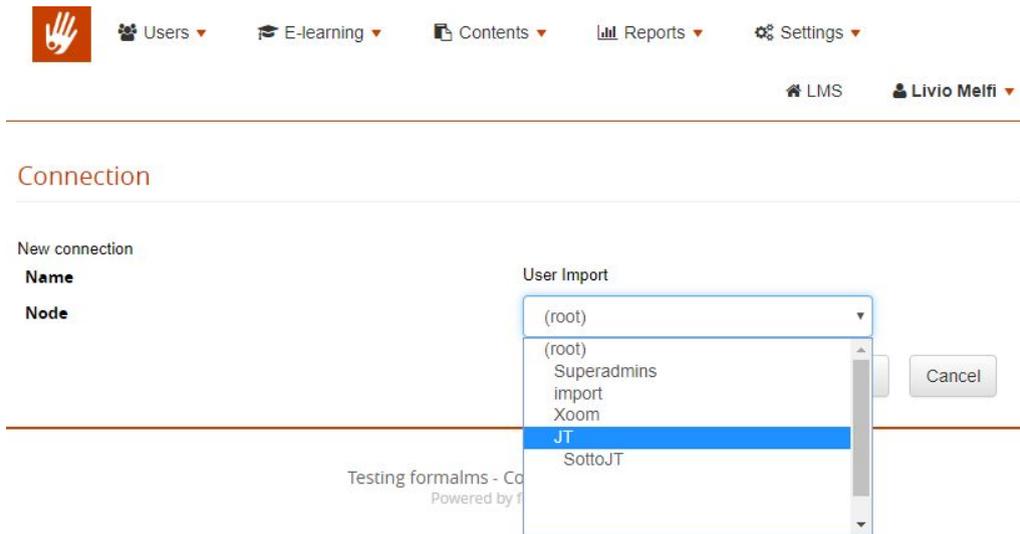
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In case the csv file contains already existing users, they will be not created once again:

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## 6.1 Importing users in an org-char node

While setting-up the docebo-users connector you can choose the chart-node in which all the the users will be imported; click finish to complete the creation of a connector that inserts the user in the selected chart-node



## 6.2 Importing users in multiple chart nodes

In case you need to assign users to different chart nodes you must prepare a CSV file containing information about the destination chart node for each user and using it during the task set-up.

Each org chart destination has to be specified using the **org chart node code**. Moreover the org chart must be already present in forma.lms; all the users assigned to not present chart node will be inserted in the root folder.

During the connector setup: **select the root node as default node**

During the task setup: map the tree\_code field with the csv column in which you insert the destination chart node:

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## Attività

Nuova attività

Nome import utenti

Schema di importazione

Nome ute	Nome	Cognome	Email	Password	tree_code
<input checked="" type="checkbox"/> login	<input type="checkbox"/> first_name	<input type="checkbox"/> last_name	<input type="checkbox"/> email	<input type="checkbox"/> password	<input type="checkbox"/> codice-dominio

Precedenti Successivi Annulla

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## 7 Creating connector for exporting a courses list

- 1) In **connectors tab** make sure the course export-connector and csv- connector are available
- 2) Create a **read** connection using the course-export-connector as in following pictures

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### Connection

New connection

Name Course Export Reader

Description

First row header  Yes  No

Finish Cancel

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- 3) In **connections tab** create a new **write** connection using the CVS connector like explained in chapter 3. Name the connections "Course Export Writer".

### Connection

New connection

Name

Description

Access  Read  Write

File pattern

Fields definition mode  Manual  From example (through the analysis of the first file matching File pattern)

Field delimiter

Enclosure character

Sub-folder

First row header  Yes  No

Next Cancel

### Connection

New connection

Field delimiter

Enclosure character

Fields definition

Previous Finish Cancel

4) Create a new task using the previous created connectors

## Tasks

New task

**Name**

Course Export

**Description**

Connector Example

**Source**

Course Export Reader ▾

**Destination**

Course Export Writer ▾

Next

Cancel

- Check the field you like to export and associate to a selected field from the pull down menu (those fields are the ones you inserted during the connector setup)

## Tasks

New task

Name

Course Export

Import schema							
field1	fieldc	field	field		Do not im	Do n	Do n
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	subscribe	method	permclose	difficult
code	name	description		subscribe_method	mediumTime	permCloseLO	
01testfiera	Il personale in trasferta: valutazione del rischio, tecniche di prevenzione e di guida sicura		italian	2	2	0	0
01	Access Test		italian	4	2	0	0
a1	Aula numero 1		italian	2	2	0	0
	Ruv this		english	2	2	0	0

- The task is ready to be run

Connectors							
Connections							
Tasks							
New task		Create					
Name	Description	Source	Destination	Schedule	Last execution		
Org Chart Updating	Connector example	XML ORG Reader	Creating a org chart from XML	at 06:00	2017-05-04 17:08:28		
Course Export	Connector Example	Course Export Reader	Course Export Writer	at 12:27	2017-06-08 15:26:55		
New task		Create					