Managed Access Gateway (MAG)

Bulk Actions Upload Guide

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EXOSTAR

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Introduction

Bulk Actions Upload allows Organization Administrators and Organization Stewards to perform user actions in bulk. This guide provides instructions on how to use the Bulk Actions Upload tab in Exostar's Managed Access Gateway (MAG).

Bulk Actions Upload

The Bulk Actions Upload option can be used to add, delete, suspend, or unsuspend multiple MAG accounts and applications at one time. Users who have singular or multiple accounts can be deleted, suspended or unsuspended. Additionally, singular or multiple applications can be suspended or deleted at one time via input from a CSV/Excel file template you upload into MAG.

Bulk Requirements/Limitations

- Max file size is 4 MB.
- Number of rows must not exceed 10,000 (only 10,000 users per upload).
- Please make sure the file contains only one sheet.
- Make sure you delete any dummy user information (i.e., the first row is filled with dummy user info as an example of what to fill out for each user).
- Number of columns must not exceed 50 (admin can include other columns in request, these additional columns will not be used but passed back in the response)
- **Country Codes:** Please make sure this column is filled out using the *ISO 3166-2 standard region code* requirements.
  - https://en.wikipedia.org/wiki/ISO_3166-2 OR https://www.iso.org/obp/ui/en/#search
  - *Examples:* Virginia: US-VA, Puerto Rico: US-PR, Texas: US-TX, New York: US-NY, Bavaria: DE-BY
- When using Excel to upload data, be aware that **by default Excel strips leading zeros from a number.** This can have unintended effects, especially for phone numbers or postal codes. End users need to be aware of this. To avoid this lossy conversion, the user should format the cells as Text, or put a ' (single quote) in front of the number, etc.
- **Results download:** On the results download (successes and failures), the following columns will be added to the file's furthest left: the Item Number, Status, Reject Reason, Created User Entity, and the User ID. The rejection reason will explain which data is incorrect and the columns to fix.
- Duplicate users with the same email will not be permitted.

Complete Template

The CSV/Excel file template must have the following fields populated. Definitions of these fields are included in the table.

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Field	Cardinality/ Values
UserID	**Required**
Role	*Optional*

Download Template

Follow the instructions to complete template download.

1. Go to the Training Resources page to download the Bulk Actions template.
2. Download the template to create your file. ***Do not modify** any formatting, field locations, or field titles.
3. Once you enter your data, **the file must be saved as a .CSV** for the upload functionality to work.
4. Save the file to your computer.

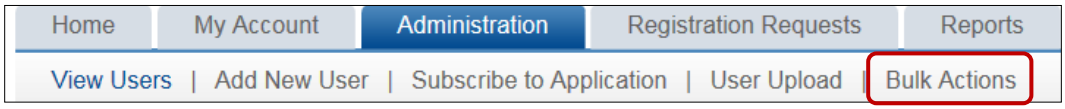
The total number of users that can be uploaded at a time is configurable. The default value is 200. If you try to upload more than the configured number of users in a single csv file, you receive an error message.

Complete Bulk Actions Upload

Follow the steps below to complete the **Bulk Actions** upload:

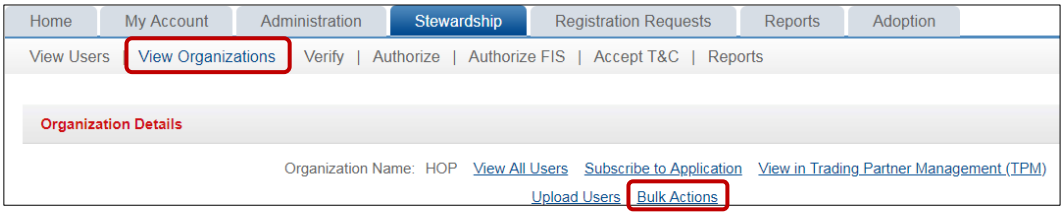
Organization Administrators:

1. Navigate to the **Administration** tab.
2. Click **Bulk Actions.**



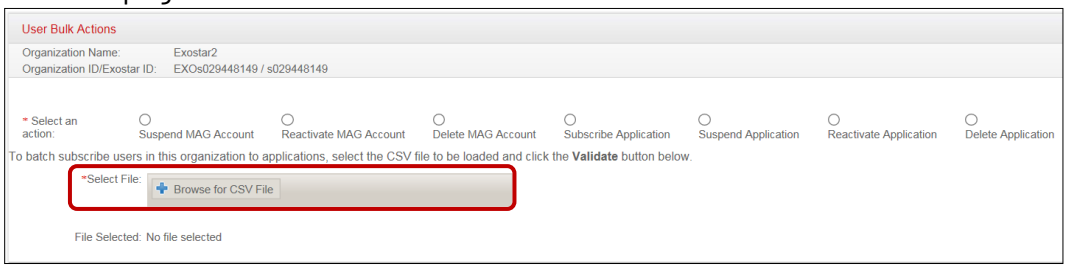
Organization Stewards:

1. Navigate to the **Stewardship** tab. Click **View Organizations**.
2. Search for the organization and select the organization from the displayed list.
3. Select **Bulk Actions**.

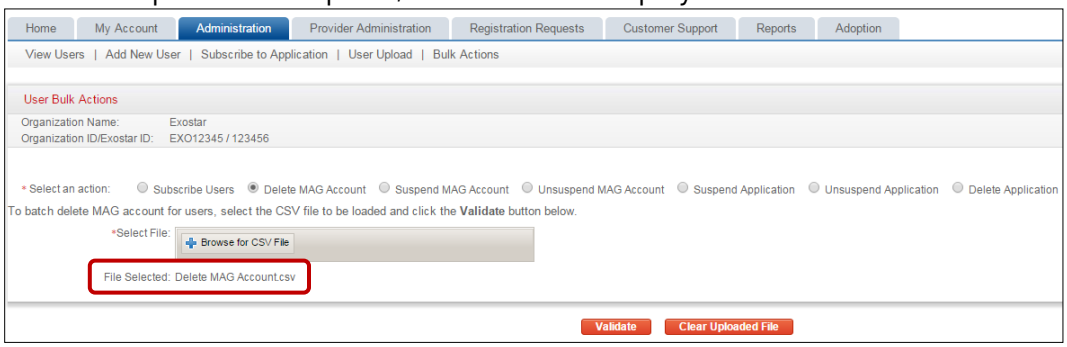


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4. Organization Administrators and Organization Stewards are presented with the **Bulk Actions** page.

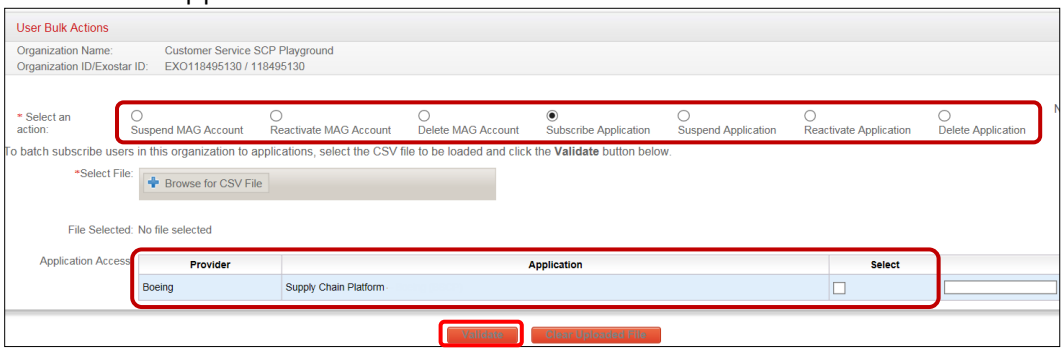


5. To upload the CSV file you created, click **Browse for CSV.** Select the CSV file from your computer.
6. Once the upload is complete, the file name displays in the **File Selected** field.



7. Choose the desired action.

NOTE: If you select the following actions **Subscribe/Suspend/Reactivate/Delete Application,** or **Suspend/Reactivate/Delete MAG Account**, a list of applications will display. Select the applications.

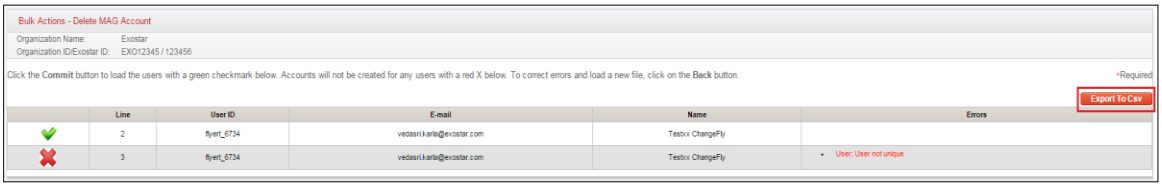


NOTE: Sponsor Code field is optional.

8. Click **Validate** to the data you entered. The system presents any errors or warnings.

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9. If there are errors preventing your file from being processed, correct them. Follow the guidelines in the Bulk Actions Error Handling section for assistance. Click the **Export to CSV** button to export the errors for reference (optional).



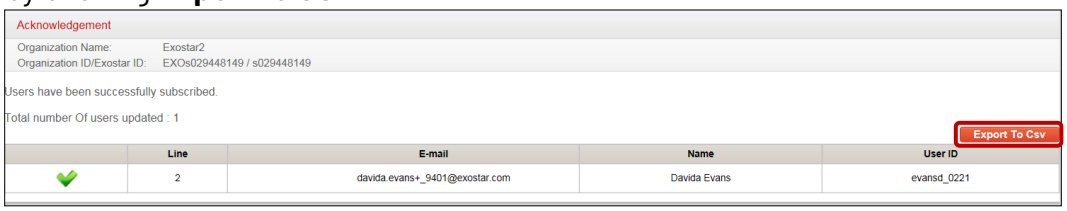
Error Example: User ID is not unique. To resolve, remove the user from the file.

The exported file contains:

- **Line Number**: Line number in the file.
- **Name**: Name of the user.
- **Email**: User's email address.
- **User ID**: User ID/UPN of the user.
- **Status**: Status of the upload; either **SUCCESS** or **FAILURE.**
- **Reason**: Failure reason.

NOTE: If you enter data the system does not recognize, such as entering UK instead of GB in the country column, your file will contain no data.

10. If you have errors, correct them in your original CSV file. **You should not upload the exported CSV file.**
11. Click **Commit** to submit the file.
12. An **Acknowledgement** page displays with the results. View the results from the file by clicking **Export to CSV**.



The process is complete. Any application subscriptions require approval by your organization's Application Administrator. The Application Administrator can approve or deny requests they are the administrator for.

User Upload

The CSV User Upload feature can be used to add multiple users to your organization. The feature uses input from a file you create based on the CSV User Upload template.

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Complete Template

The CSV file needs to have the following fields populated:

Field	Cardinality/ Values	Response/Comments
Last Name	**Required** Max 32 characters	Accepts letters, numbers and special characters.
First Name	**Required** Max 32 characters	Accepts letters, numbers and special characters
Middle Name	*Optional* Max 32 characters	Accepts letters, numbers and special characters.
Suffix	*Optional* Max 4 characters	Accepts letters, numbers and special characters. If entered value does not match one of the following options: II, III, IV, V, VI, VII, VIII, Jr., or Sr., the system saves it as an 'Other' value.
Honorifics	*Optional*	Accepts only the following the characters: Dr., Miss, Mr., Mrs., Ms, Prof., Sir, and (no characters entered).
Job Title	*Optional* Max 50 characters	Accepts letters, numbers and special characters.
Email Address	**Required** RFC822 compliant	Must be unique.
Phone	**Required** Min 4 characters Max 20 characters	Accepts only the following characters: Numbers, '-', '+', '.', '(', ')', 'e', 't', 'x' and embedded white spaces.
Fax	*Optional* Min 4 characters Max 20 characters	Accepts only the following characters: Numbers, '-', '+', '.', '(', ')', 'e', 't', 'x' and embedded white spaces.
Address 1	**Required** Max 64 characters	Accepts letters, numbers and special characters.
Address 2	*Optional* Max 64 characters	Accepts letters, numbers and special characters.
City	**Required** Max 52 characters	Accepts letters, numbers and special characters.
Region code (ISO 3166-2)	**Required**	Instead of State/Country > use ISO 3166-2 standard region code. https://en.wikipedia.org/wiki/ISO_3166-2 https://www.iso.org/obp/ui/en/#search *(i.e.: Virginia: US-VA, Puerto Rico: US-PR, Texas: US-TX, Bavaria: DE-BY)*

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Role	**Required**	Accepts only the following values: org_admin, app_admin, and bundle_admin.
R-IDP User ID (New users only)	*Optional*	• R-IDP User ID must be unique for the associated R-IDP. • Organization must be associated to an R-IDP. • Minimum 1 character required if value is entered.
Employee Reference	*Optional* Max 16 characters	Accepts letters, numbers and special characters.

Download Template

Follow the instructions to complete template download:

1. Go to the Training Resources page to download the template.
2. Download the template to create your file. Do not modify any formatting, field locations, or field titles.
3. Once you enter your data, **the file must be saved as a .CSV** for the upload functionality to work.
4. Save the file to your computer.

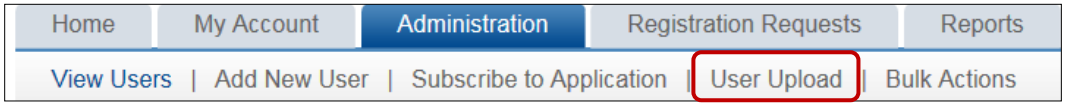
NOTE: The total number of users that can be uploaded at a time is configurable. The default value is 200. If you try to upload more than the configured number of users in a single csv file, you receive an error message.

Complete User Upload

Follow the steps below to complete the **User Upload**:

Organization Administrators:

1. Navigate to the **Administration** tab.
2. Click **User Upload.**

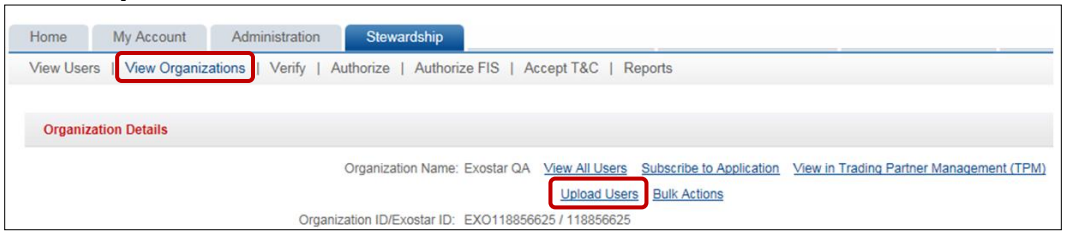


Organization Stewards:

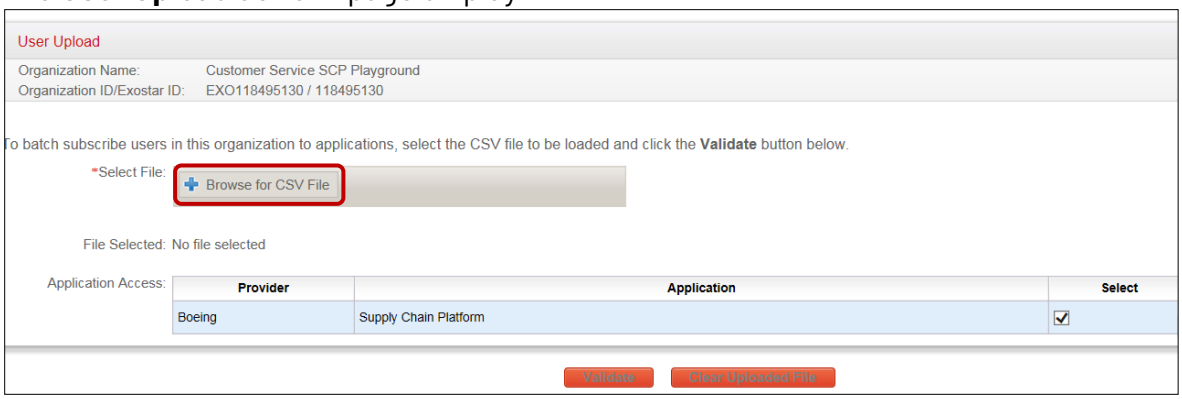
1. Navigate to the **Stewardship** tab and click **View Organizations**.
2. Search for the organization and select the organization from the displayed list.

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3. Select **Upload Users**.

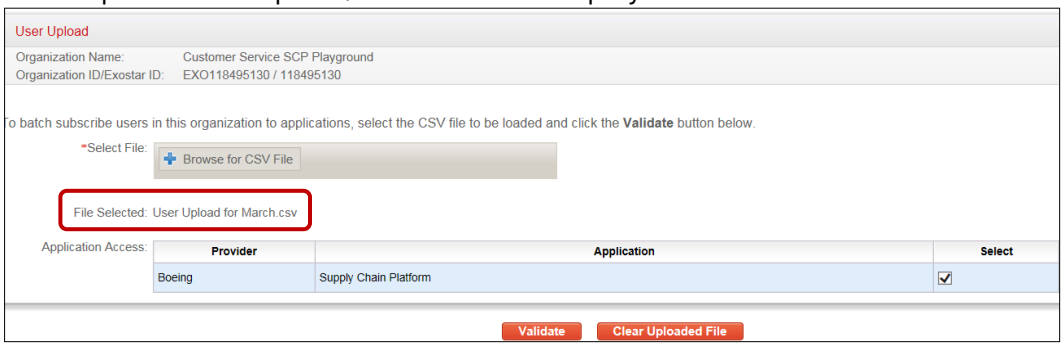


4. The **User Upload** actions page displays.

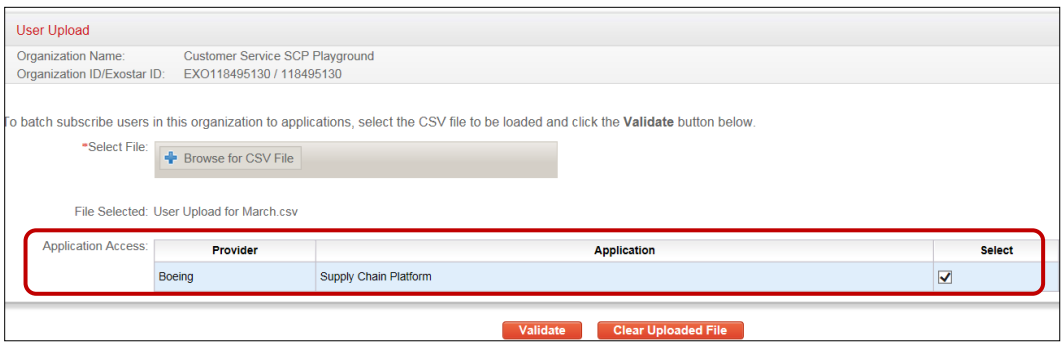


5. To upload the CSV file you created, click **Browse for CSV.** Select the CSV file from your computer.

6. Once the upload is complete, the file name displays in the **File Selected** field.



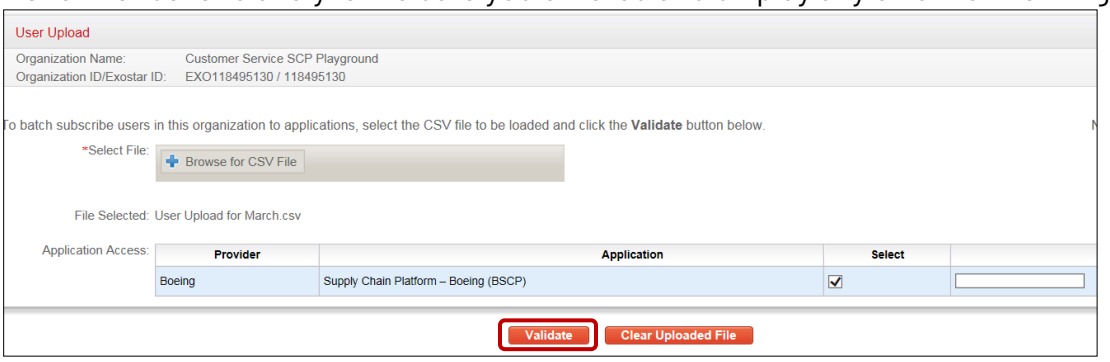
7. Select the desired applications.



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NOTE: Sponsor code field is optional.

8. Click **Validate** to analyze the data you entered and display any errors or warnings.



9. If there are errors preventing your file from processing, correct them. Follow the guidelines in the User Upload Error Handling section of this guide for assistance. Click the **Export to CSV** button to export the errors for reference (optional).

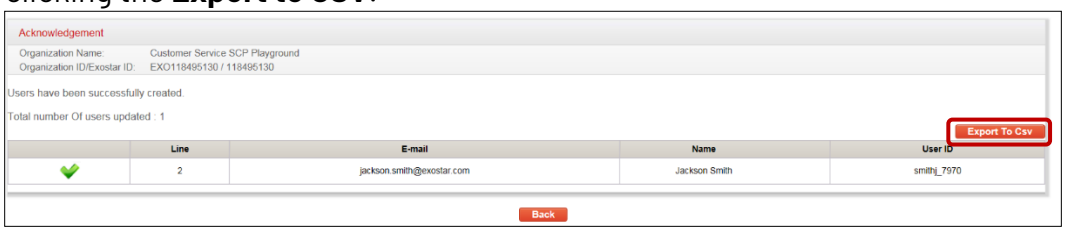


The exported file contains:

- **Line Number**: Line number in the file.
- **Name**: Name of the user.
- **Email**: User's email address.
- **User ID**: User ID/UPN of the user.
- **Status**: Status of the upload; either **SUCCESS** or **FAILURE.**
- **Reason**: Failure reason.

NOTE: If you enter data the system does not recognize, such as entering UK instead of GB in the country column, your file will contain no data.

10. If you have errors, correct them in your original CSV file. **You should not upload the exported CSV file.**
11. Click **Commit** to submit the file.
12. An **Acknowledgement** page displays the results. View the results from the file by clicking the **Export to CSV**.



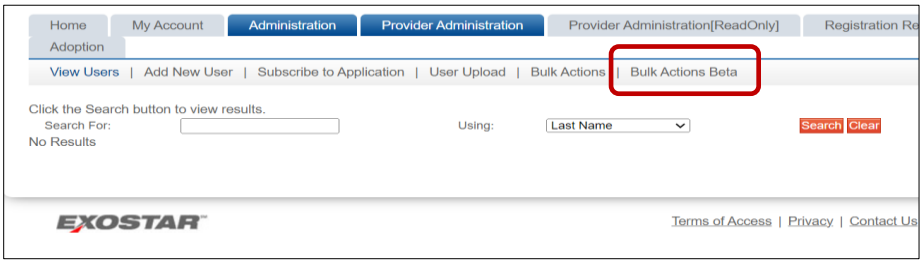
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The process is complete. Any application subscriptions require approval by your organization's Application Administrator. The Application Administrator can approve or deny requests for applications they administer.

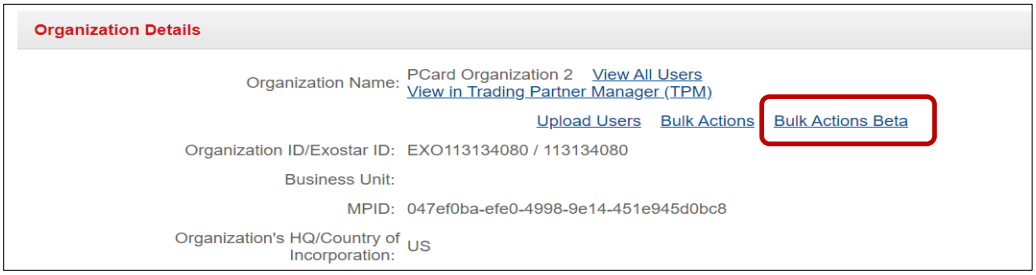
BETA Bulk Uploads

To use BETA Bulk Uploads, follow the steps below:

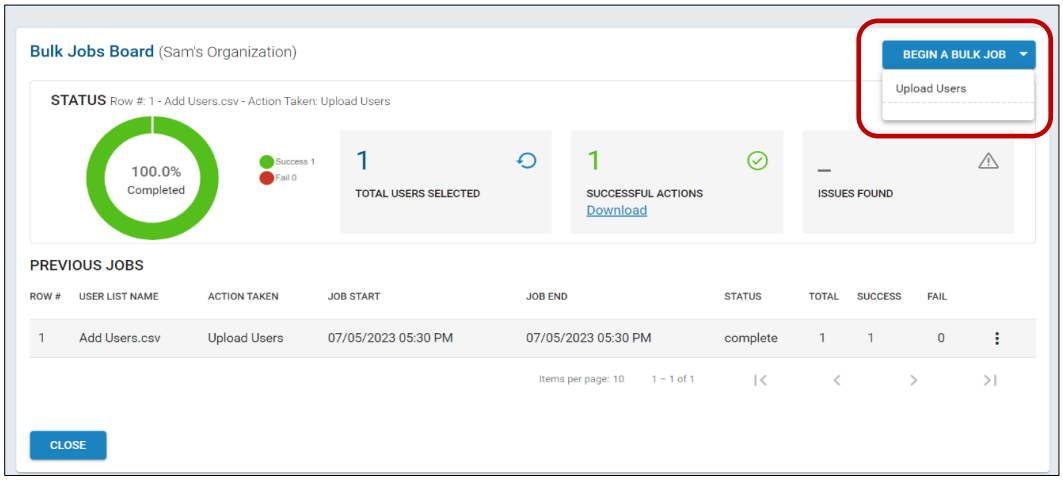
1. As an **Organization Administrator**, from your Administration tab, select the **Bulk Actions Beta** sub-tab.



2. If you manage multiple organizations, as an **Organization Steward**, under the **Organization Details** tab, click **Bulk Actions Beta** link.

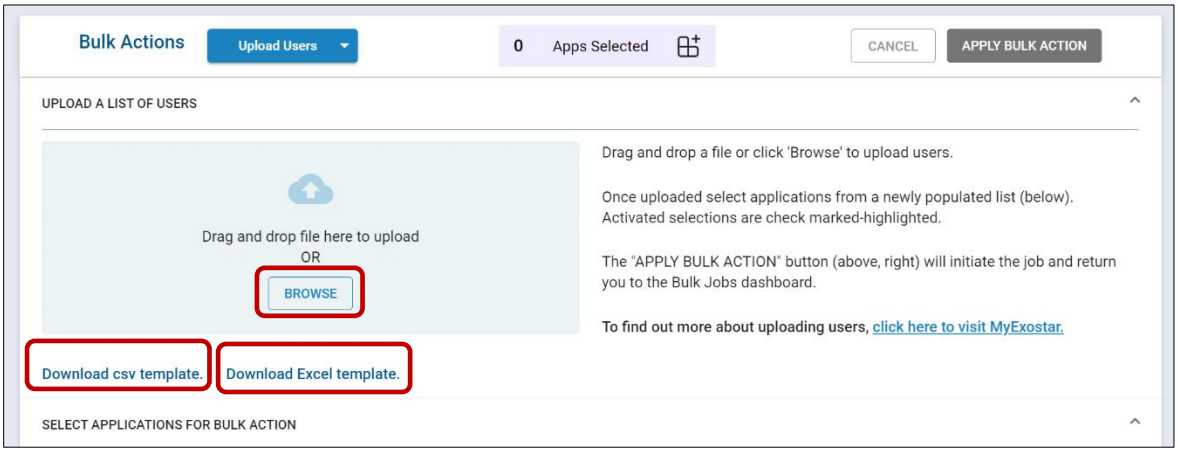


3. You will be redirected to the **Bulk Jobs Board** page.
4. The user begins a new action to upload users by clicking on the **BEGIN A BULK JOB** drop-down and selecting Upload Users.

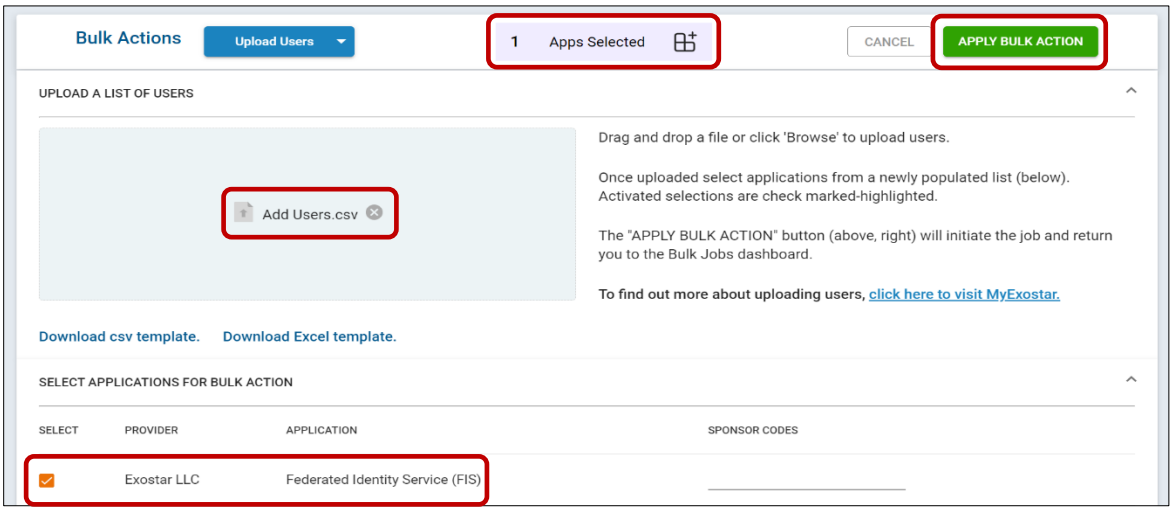


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5. You will see a page display to download the **template file** (*CSV* or *Excel* workbook), as well as select the applications they want to subscribe the new users to.

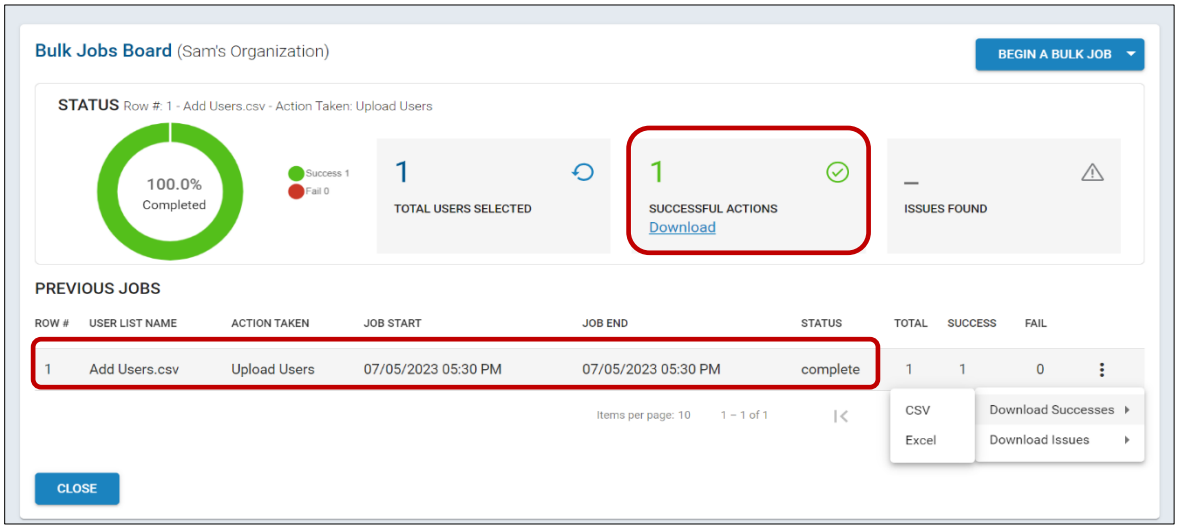


6. Download the template, then fill out the fields as required. Save your file to your computer.
7. Then click **BROWSE** to upload the file. Once a valid file is uploaded the admin can click on the Green **APPLY BULK ACTION** button to begin processing the file.

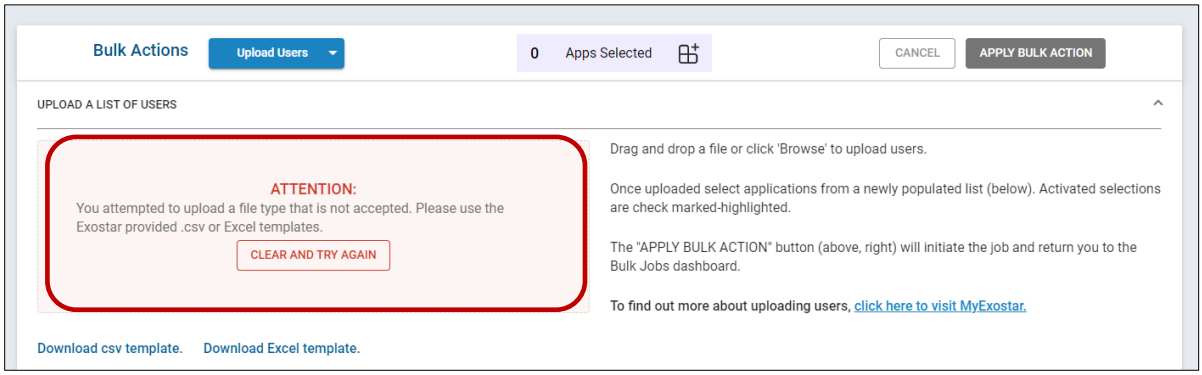


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8. You will be redirected to the dashboard where you can monitor the status of your action or carry out a new action which is added to the queue (asynchronous process).

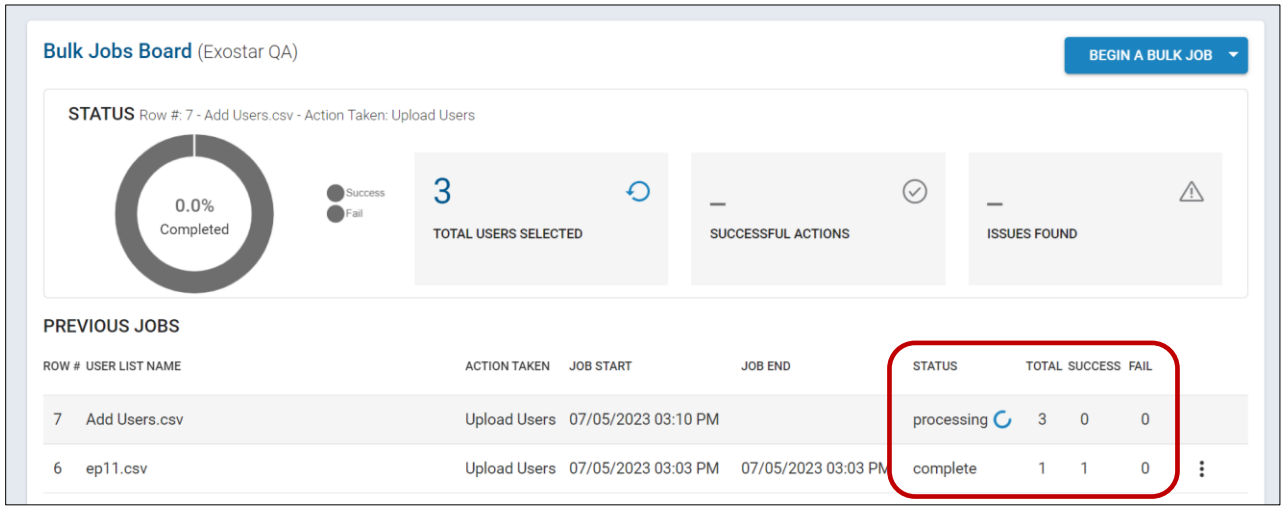


9. If you run into any errors, a message will display informing you the file is checked and if the right number of required columns exist, the file size matches requirements, etc. You must correct any errors in the file before you can proceed with the bulk upload.



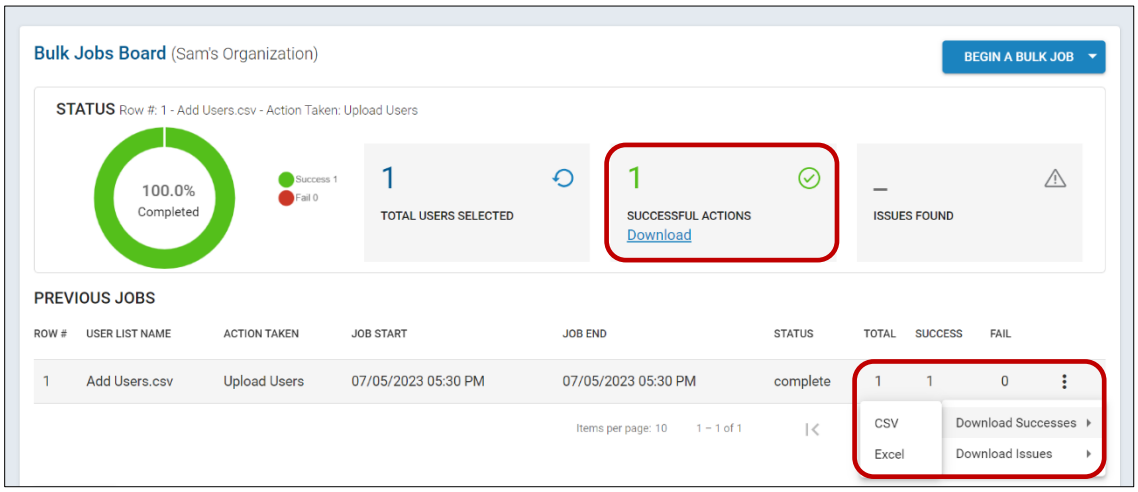
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10. After you correct any errors and re-upload the file, you can check the status on the Bulk **Jobs Board**.



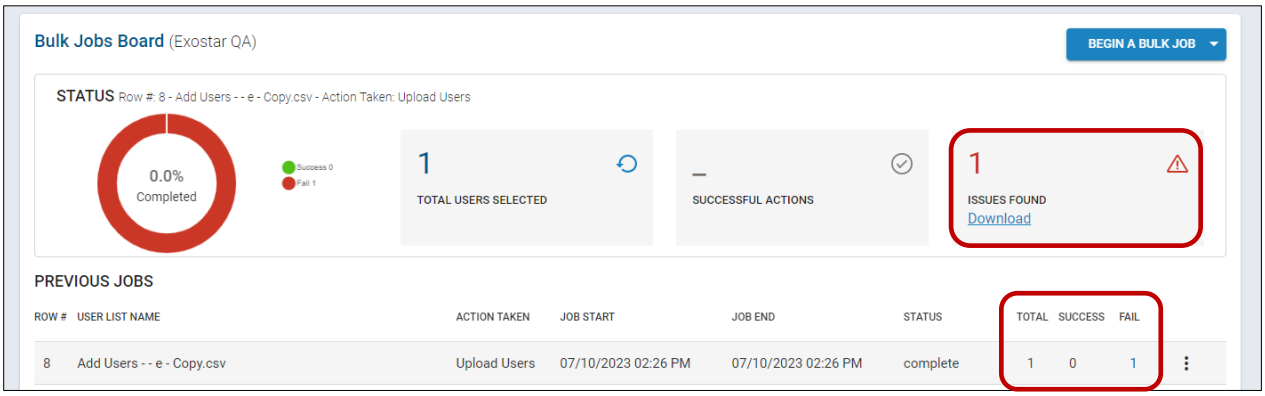
11. Once the upload is complete, the Admin can view how many users in the file were successfully added and how many failed. You can also download a file of all successful users or all failed users to be corrected and re-uploaded.

Bulk Upload Success



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Bulk Upload Failed



If the bulk upload failed, repeat the steps above to correct the errors and re-upload to begin the bulk upload process again.

Error Handling

This section includes error you might receive when completing the upload process for Bulk Actions and User Upload.

Bulk Actions Errors

The upload utility has features built in to help resolve data formatting issues. Use the below table to understand and resolve issues during file validation.

Validation Message	Error Condition
User: Unauthorized action. User subscription to the application <appname> is not active. Cannot suspend or unsuspend or delete selected application for user <userID>.	Suspend an application for the user whose subscription to the application is not active.
User: MAG account for the user <userID> was suspended. Cannot suspend or unsuspend or delete application.	Suspend or unsuspend application for users whose MAG account is suspended.
User: User ID Not Found	Organization Administrator can perform bulk upload on the users belonging to his organization only. If a user not belonging to his organization is in upload file.
User: Unauthorized action. User subscription to the application is not eligible to unsuspend	Unsuspend an application for a user with status other than "SUSPEND"
Application: No application was selected.	Suspend or activate an application without selecting an application

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User: Unauthorized action. MAG account status for the user <userID> is DEFERRED.	Trying to unsuspend MAG account for a user whose MAG account status is DEFERRED.
User: User account <userID> is already active.	Trying to unsuspend MAG account for a user whose MAG account is already enabled.
User: Unauthorized action. MAG account status for the user <userID> is NASCENT-Pending First Logon.	Trying to unsuspend MAG account for a user whose MAG account status is NASCENT.
User: User account <userID> was already suspended.	Message should be displayed on trying to suspend MAG account for a user whose MAG account is already suspended
User: User ID Not Found	Once a MAG account is deleted for a user no further upload action is allowed on that account. Warning displays on trying to perform any action for a user having MAG account status as DELETED.

User Upload Errors

The upload utility has features built in to help resolve data formatting issues. Use the table below to help understand and resolve issues occurring during file validation.

Error Condition	Validation Message
Required field is missing from the file	<Column Name> is required.
Data in field is too long	<Column Name> is too long.
Data in field is invalid.	<Column Name> is not valid.
Organization is subscribed to application bundle and application being requested is flagged as bundle only	User cannot be subscribed to <Application name>.
Both a password and a R-IDP ID are present in the file	Either User Password or Remote User ID may be set, but not both
R-IDP ID is not unique within the organization's R-IDP.	This remote account is already linked to another MAG account
Organization is not subscribed to an R-IDP but file contains R-IDP User ID and no password for a user	This organization is not enabled for EAG.

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Email Address already exists for user in organization	An account is already created for this email address in this organization, or more than one user with the same email address found in the file. **Note**: Not an error, just an additional message.
Account is a child account and FIS is being requests	This account is not eligible for FIS because it is a child account.
User is already subscribed to the application	User is already subscribed to <Application Name>.
User is already an application administrator for an application	User is already an application administrator for <Application Name>.

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