

MemberExport PRO

User manual



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1 Introduction

MemberExport Pro helps you export members from your Umbraco installation to an Excel or Csv file. It's also possible to save the export options steps for later use .

MemberExport PRO can export thousands of members in a few seconds.

MemberExport uses the database directly and will only work with the default Umbraco Membership provider!¹

¹ Since version 2.6 you can use a derived type of the Umbraco membership provider see chapter configuration how to configure this.

2 Installation

Install the MemberExport PRO package using the Umbraco package installer.



MemberExport

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Package version v3

License [Member export \(PRO\) license agreement](#)

Package readme

MemberExport helps you exporting Umbraco members to an Excel or csv file. Once installed it adds a new folder to the Members section. MemberExport PRO can export thousands of members in seconds, you can export directly to Excel and you can save your export options for later use. If you don't have a license file Memberexport is limited to export 200 records and CSV output only.

IMPORTANT: This installer will need modify rights to folders: /bin,/config and /app_data, folder and also needs to be allowed to create tables in the database.

For a manual installation read the documentation.

I accept [terms of use](#)

Install package

Make sure that the installer has modify rights on the following folders:

- /bin
- /app_plugins

The installer also needs rights to create tables in the database.

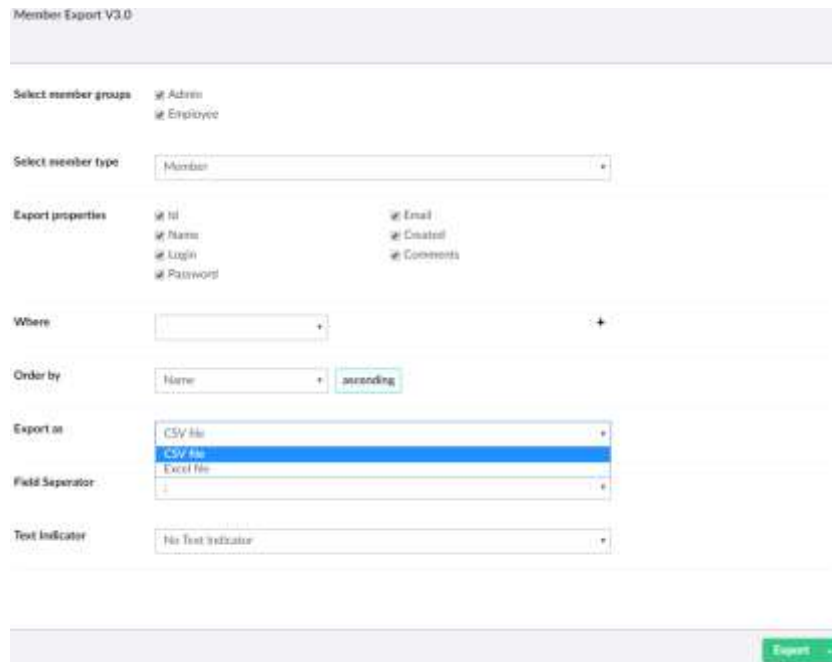
If for some reason you can't give the installer these rights, you can install the package manually. Read the chapter manual configuration how to do this.

Once the package is installed you have an extra folder in your member section called MemberExport. You might need a page refresh to see this folder.

3 Export Members

To export members you browse to the Member section of your Umbraco site. Open the “Export members” folder and click on the “Export members” menu option. The export member screen will appear.

Here you can specify what to export, specify the export format (Excel, or csv) and you can specify the csv export options in case of csv export.



The screenshot displays the 'Member Export V3.0' interface. It features several sections for configuration:

- Select member groups:** Includes radio buttons for 'Admin' and 'Employee'.
- Select member type:** A dropdown menu currently set to 'Member'.
- Export properties:** A grid of checkboxes for 'Id', 'Name', 'Email', 'Login', 'Password', 'Contact', and 'Comments'.
- Where:** A dropdown menu with a plus sign to the right.
- Order by:** A dropdown menu set to 'Name' and a 'ascending' button.
- Export as:** A dropdown menu with 'CSV file' selected and 'Excel file' as an alternative.
- Field Separator:** A dropdown menu.
- Text Indicator:** A dropdown menu set to 'No Text Indicator'.

At the bottom right of the form, there is a green 'Export' button.

When you click the export button you can download or open the csv file.

3.1 Filter and sort data

Since Version 3 and higher you can filter and sort data before exporting. In the Where clause select a field you want to filter on and add the criteria. You can query on multiple criteria. Use + to add criteria and the trash can icon to remove a criteria. Order by field allows you to sort data in the exported file ascending or descending.



Where: Name (dropdown) contains (dropdown) test (input) + trash icon

And: Created (dropdown) after (dropdown) 2018-11-20 (date input) + trash icon

Order by: Name (dropdown) ascending (button)

3.2 Save exports

You can save the export options for later use, by hitting the save button. The saved exports will be stored in the same “Export Members folder” The save option will only save the export definition. The actual export file will be generated on the fly .



4 Extend MemberExport

MemberExport is an out of the box product, still in some cases you might want to modify the package to your needs. MemberExport can be extended by writing your own value parsers and export providers.

4.1 Value parsers

By default MemberExport exports the stored value from the database. When this value is an Id value you might want to export the text value instead. This can be achieved using a value parser. By default MemberExport comes with value parsers for the following datatypes :

- Checkbox
- Dropdownlist
- MNTP
- MultipleDropdownlist
- Radiobox
- Ultimatepicker

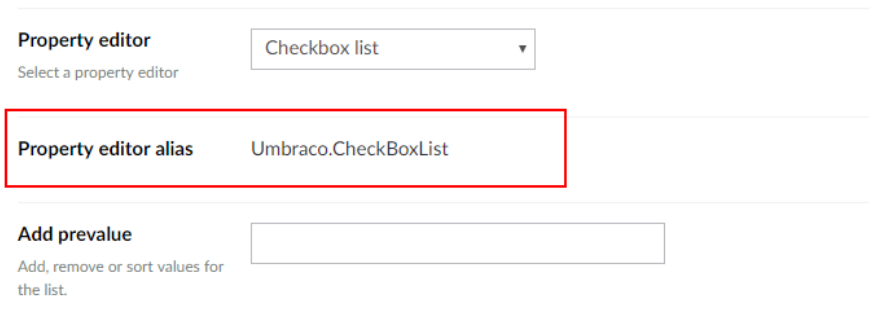
In the example below we will write a value parser for the Checkbox datatype. By default values will be exported as 1/0. We want the values to be exported as yes/no for this example.

First we need to add a reference to the MemberExport.Library dll. Then we can create a class that implements the IValueParser interface and decorate the class with the ValueParser attribute

```
[ValueParser(PropertyEditorAlias = "b4471851-82b6-4c75-afa4-39fa9c6a75e9")]
[ValueParser(PropertyEditorAlias = "Umbraco.CheckBoxList")]
public class CheckboxValueParser : IValueParser
{
    public virtual object Parse(object value)
    {
        return null;
    }
    public virtual object Parse(MemberField memberField, object value, FieldParserOptions
fieldParserOptions)
    {
        if (value != null)
        {
            var sb = new StringBuilder();

            foreach (string item in value.ToString().Split(','))
            {
                var prevalue = memberField.GetPrevalues().FindLast(p => p.Id.ToString() == item);
                if (prevalue != null)
                {
                    if (sb.Length > 0)
                    {
                        sb.Append(',');
                    }
                    sb.Append(prevalue.Value);
                }
            }
            value = sb.ToString();
        }
        return value;
    }
}
```

The propertyeditor alias of the valueparser attribute needs to return the GUID which is displayed on the datatype edit screen.



Property editor

Select a property editor

Property editor alias

Add prevalue

Add, remove or sort values for the list.

The Parse method will be called when a true/false property value is exported. In the above example we transform the value to a csv list of selected items.

The following information about the exported field is available in the memberFieldInfo variable:

- **PropertyId.** The id of the property
- **PropertyEditorAlias.** The alias of the property editor
- **DatatypeNodeId.** The node id of the Datatype.
- **Alias.** The Property alias.
- **Text.** The Property text.

To use the Value Parser all we need to compile the project and add the dll to the bin folder of the Umbraco install. Then it will be picked up automatically and values will be exported as csv.

5 Manual Installation/Configuration

If you renamed the Umbraco folder or for some reason can't give the installer sufficient rights to create tables in the database, or the sufficient rights to modify the following folders /bin, /app_plugins you need to install MemberExport PRO Manually.

5.1 Manual installation of files

- Open the folder in the zip file.
- Copy all .dll files to the /umbraco/bin/ folder.
- Copy delete.controller.js, delete.html, memberexport.controller.js and memberexport.html to App_Plugins\memberexport\backoffice\ memberexport
- Copy MemberExport.Config to App_Plugins\memberexport \config
- Copy MemberExport.css to App_Plugins\memberexport\ css
- Copy memberexportdatepicker.js, memberexportlicenseinfo.js and memberexportnumericinput.js to App_Plugins\memberexport\ directives
- Copy booleancheckbox.controller.js, booleancheckbox.html, checkBoxList.controller.js, checkBoxlist.html, datepicker.html, dropdownselector.controller.js, dropdownselector.html, numericinputfield.html, orderby.controller.js, orderby.html, queryfilter.controller.js, queryfilter.html to App_Plugins\memberexport\fields.
- Copy csvexport-bw.png and excelexport-bw.png to App_Plugins\memberexport\images.
- Copy *.xml to App_Plugins\memberexport\lang
- Copy memberexportbackofficeresources.js to App_Plugins\memberexport\resources
- Copy memberexporthelper.js to App_Plugins\memberexport\services
- Copy package.manifest to App_Plugins\memberexport\

If you purchase a license (.Lic) file. Put that in the Bin folder of your Umbraco install!

5.2 Manual configuration of Database

Run the following script to install the database tables

```
CREATE TABLE [dbo].[MemberExportState] (
    [Id] [int] IDENTITY(1,1) NOT NULL,
    [UniqueIdentifier] [uniqueidentifier] NOT NULL,
    [Name] [nvarchar](255) NOT NULL,
    [ExportState] [ntext] NOT NULL,
    [Icon] [nvarchar](255) NOT NULL,
    CONSTRAINT [PK MemberExportState] PRIMARY KEY CLUSTERED
(
    [Id] ASC
)WITH (PAD_INDEX = OFF, STATISTICS_NORECOMPUTE = OFF, IGNORE_DUP_KEY = OFF, ALLOW_ROW_LOCKS = ON, ALLOW_PAGE_LOCKS = ON) ON [PRIMARY]
) ON [PRIMARY] TEXTIMAGE_ON [PRIMARY]
```

5.3 Update trees.config

Add the following snippet to the /config/trees.config file.

```
<add initialize="true" sortOrder="99" alias="memberexport" application="member" title="Member export" iconClosed="icon-folder" iconOpen="icon-folder-open" type="MemberExport.Controller.MemberExportTreeApiController, MemberExport" />
```

6 Configuration

6.1 Exclude properties

When you want to exclude a property from the export options screen. You can add it to the `excludeProperties` elements of the `Memberexport.config` file. Create an exclude element such as below and add it to the config file

```
<exclude alias="[alias of your property here]"/>
```

By default the new technical properties of the Umbraco membership provide such as `LockOutDate` etc are ignored.

6.1.1 Fixed properties

Besides the user defined properties it's also possible to exclude fixed properties such as Name of the member. Excluding these properties work exactly the same as excluding normal properties, they are prefixed with `__member`. Below all the fixed properties

Alias	Description
<code>__memberName</code>	The name of the member
<code>__memberCreatedBy</code>	The user created the member (disabled by default)
<code>__memberCreated</code>	The date the member is created
<code>__memberId</code>	The node id of the member
<code>__memberLogin</code>	The login of the member
<code>__memberPassword</code>	The password of the member
<code>__memberEmail</code>	The email address of the member
<code>__memberType</code>	The member type
<code>__memberGroups</code>	A comma separated list of groups assigned to the member

6.2 Configure a custom Membership provider

When you have custom membership provider that derives from the normal membership provider you can configure the type on the `supportedMemberAPIProviders` element of the `memberexport.config` file.

```
<supportedMemberAPIProviders>
  <provider typeName="Customproviders.members.membershipprovider"/>
</supportedMemberAPIProviders>
```

This only works with membership provider that derives from the Umbraco membership provider. Or where you copied the code from the original Umbraco Membership provider and use the normal Umbraco tables to store member data, otherwise it will not work.

7 Troubleshooting

7.1 I don't see the MemberExport package in my members section

Make sure you have sufficient rights to install the package. See chapter 2, otherwise perform a manual installation see chapter 4.

7.2 My CSV file is messed up when opening in Excel.

Make sure that you set the correct options to display the CSV file. For Excel, choose ; as the delimiter and " as a string indicator.

7.3 I get an Invalid License exception.

Make sure you've bought the correct license for the (sub)domain, or an enterprise license and added the license file to the bin folder. Contact support@soetemansoftware.nl for help.

7.4 I get an Invalid Membership provider message.

MemberExport uses the Database directly and will therefore only work with the default Membership provider. Contact support@soetemansoftware.nl for help.