

Bulk User Import and Generate Random Password via Email

This feature is available from Claromentis 8.13.17+. If you are on an older version please request an upgrade here.

Overview

In this guide, we will outline the process of

- Importing a CSV file to perform a bulk import of new users.
- Generate random passwords for them.
- Send email invitations via email.
- Optional: Force user to set new password on login
- Customise invitation email template.

Prerequisite

You may have to decide and customise what user fields you wish to store in Claromentis and perform an export so that you have a CSV template to work with by following this guide: CSV: Updating user profile fields

Importing CSV File

1. At a minimum, your CSV files must have the following headings: **username**, **firstname**, **surname**, and **email** and to generate a random password **it mustn't contain a password column**.

	Α	В	С	D	
1	username	firstname	surname	email	
2	adam.smith	Adam	Smith	adam.smith@email.com	
3	bob.charlie	Bob	Charlie	bob.charlie@email.com	
4	carly.brown	Carly	Brown	carly.brown@email.com	

Tips: We recommend uploading max around 200 users per CSV to avoid overloading your email server.

- 2. Navigate to Admin > People, and select Add/Update from CSV file
- 3. Select the CSV file from your computer and check "Generate random passwords and send login credentials via email"

Choose CSV file with users data	Choose file import.csv
	Synchronization mode (add, update and delete users)
	NB - When creating new users, please ensure that the following mandatory fields are present and correct. username, firstname or surname, password and email.
	✓ Generate random passwords and send login credentials via email
	Random passwords will be generated for newly created users that don't have a password specified in the CSV file. Credential emails will be sent to newly created users, and to existing users whose passwords are changed by the import.
	Submit

4. Select the action you wish, in this case, check the heading to "Add" all users.

Status value can be: Error, New, Update, Old.
Old - user found in the system but not found in the uploaded CSV.
Update - user found in the system and found in the uploaded CSV.
New - user not found in the system and found in the uploaded CSV.
Error - user with invalid field set for update and insert actions.

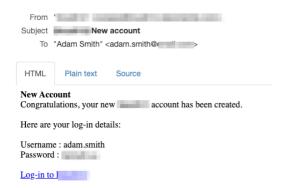
NB - When creating new users, please ensure that the following mandatory fields are present and correct. **username, firstname or surname, password and email.**

Add	Update	Sync Groups	Sync Roles	Subscribe to all news channels					
M					Status	Username	Firstname	Surname	Email
V				V	New	adam.smith	Adam	Smith	adam.smith@email.com
V				V	New	bob.charlie	Bob	Charlie	bob.charlie@email.com
V				W	New	carly.brown	Carly	Brown	carly.brown@email.com

Confirm submit

5. After clicking "Submit" you will receive confirmation that all these users have been added and an email invitation was sent.

adam.smith (First Name: Adam, Surname: Smith) New user added successfully bob.charlie (First Name: Bob, Surname: Charlie) New user added successfully carly.brown (First Name: Carly, Surname: Brown) New user added successfully Number of new users



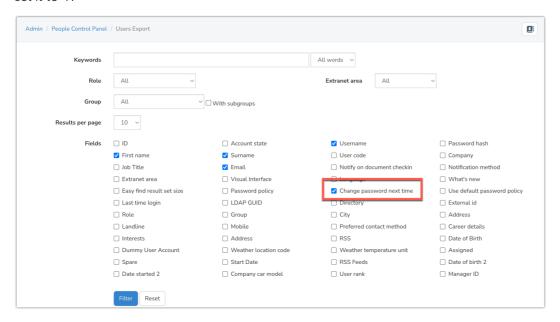
Optional: Force users to set a new password on login

Following the steps above are sufficient to ensure each new user added by the CSV is emailed a random password to log in with.

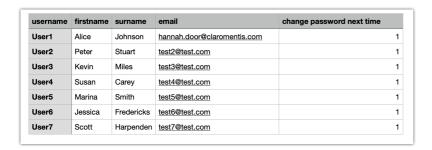
However, you may additionally wish to prompt the user to set their own password to use going forward after the initial login.

This means the random password would no longer be active and instead the user creates one, in line with the password policy rules administrators have set.

To ensure this, additionally include the 'Change password next time' column in the CSV used to import the new users and set it to '1':



1 = yes and means the system will turn on the People option shown below for those users:



So once the CSV import is finished, users will be emailed a random password which they can log in with, and after successful first login, the system will additionally prompt the user to create their own to use going forward as shown

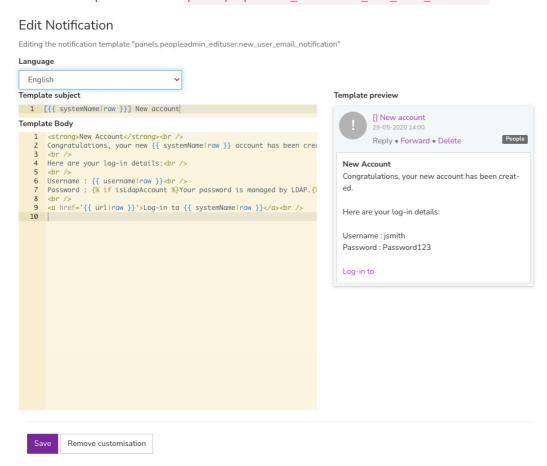
below.



Intranet email templates can be customised from Admin > System > Localisation > Edit Notification Template

Under System select your appropriate default language ie: English

The email template is called: panels.peopleadmin edituser.new user email notification



System notification templates use twig formatting, so any drastic changes made must adhere to these rules.

Slight modifications to the wording of the template likely won't need any twig logic applied, however, for changes beyond this more information on how to follow the formatting is here.

Click "Save" to apply any changes.