Creating new local users in bulk

User accounts can be created as long as license spaces are available.

There are various methods of account creation in Claromentis.

This guide will cover the manual creation of multiple local accounts in bulk, using a CSV.

## Creating local user accounts in bulk

A CSV import is used by a People administrator to facilitate the account creation.

This means your team need to prepare a CSV file to use for the import.

The processing time required by the system to complete all actions pushed to it by the import means your team should consider:

1. How many users are going to be included

Creating an account is an action that takes up processing time, so the larger the CSV the longer this takes to complete.

2. How much metadata about the users you want to include, e.g. phone number, address, location, etc

You may want to import information about each user at the same time as creating their account. Each column in the CSV and the data contained in it adds on to the processing time.

If too many users or too much information is included in the CSV, it won't be able to complete.

**General advice**

The 4 fields required to create local accounts in bulk are Username, first name, last name, email, and the system can process this quickly if the CSV only contains data to create users with these fields only.

We recommend importing new users in batches of 200 - 300 users at a time to ensure the import can complete within the processing time.

So, depending on how many users you want to create in bulk, and how much metadata is included against each, you can make a judgment on the batch size for your CSVs for the import to be successful.

It is worth considering importing a CSV to create user accounts in the first instance and then importing the metadata in subsequent imports.

If you would like further advice before you run your imports, pleaseraise a support ticket, and our team will assist you, or if you are onboarding, contact your onboarding team.
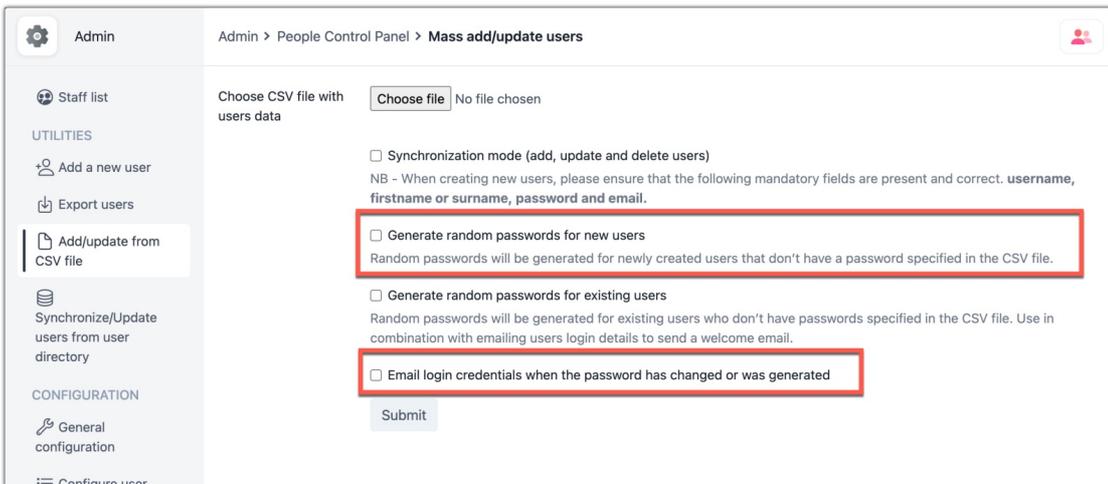
## Steps

1. Head to **Admin > People**.

2. Click the 'Add/Update' tab
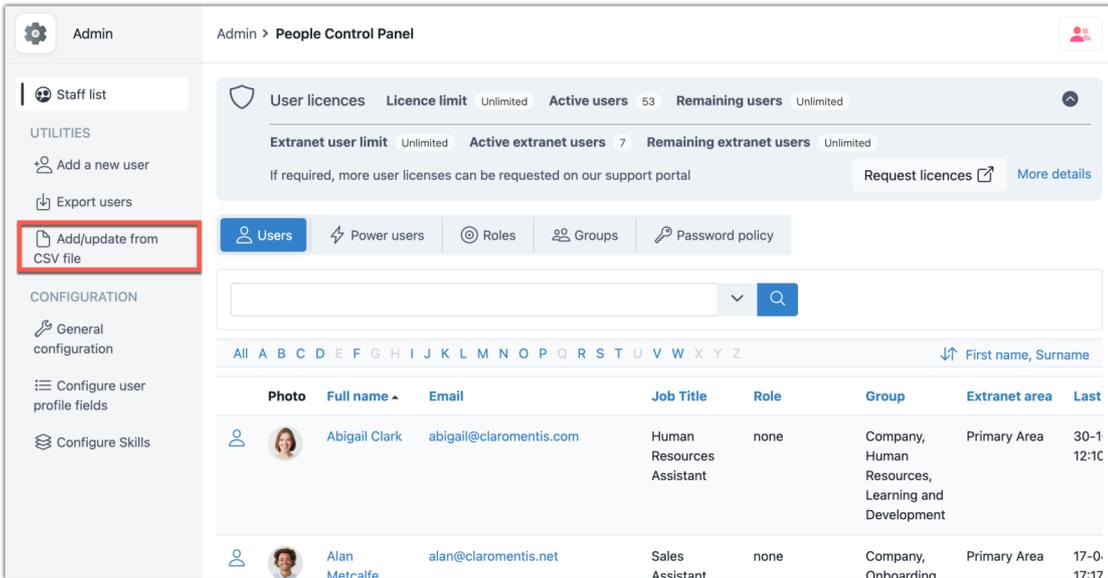


3. On the next screen, click 'choose file' and upload your CSV from your computer.

After this, consider the import options available.

If you are creating new users, the one to select is 'Generate random passwords for new users'



Also consider whether you also need to select 'Email login details when the password has changed or was generated' as this will notify each user of their credentials.
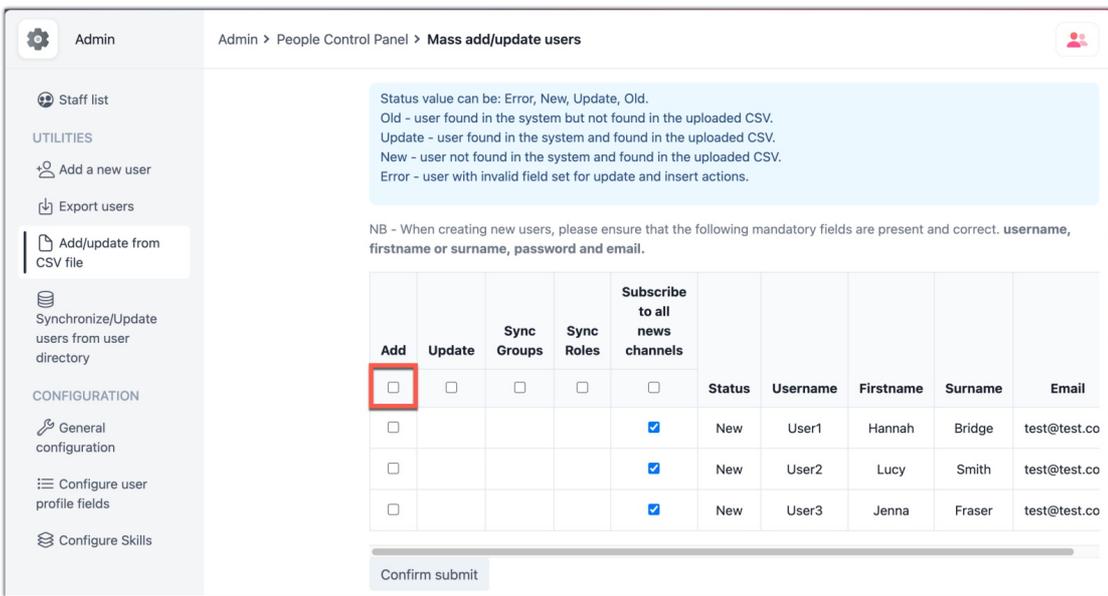
If you are onboarding, you may not want to notify users at this stage, but you do want to create their accounts, so ensure the email option is deselected.

Click 'Submit' to proceed.

4. The Intranet will read the CSV and ask what you wish to do with its contents.

Select the 'Add new' checkbox for all users in the CSV and click 'Confirm submit'.
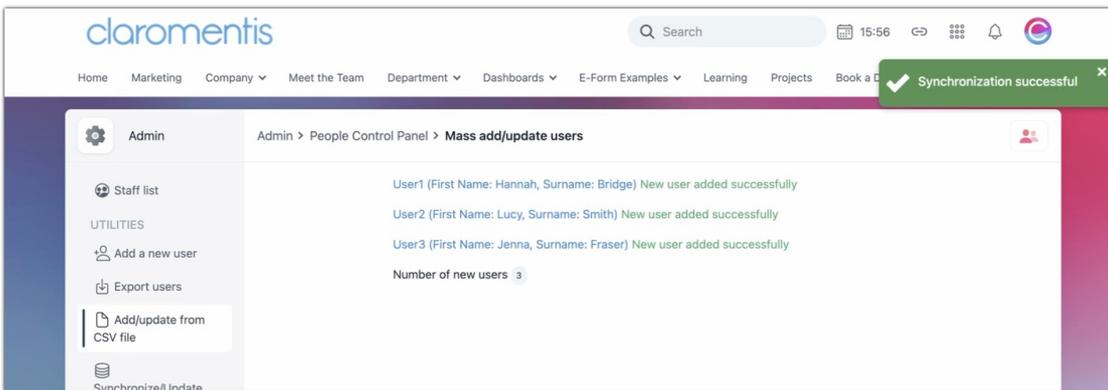
The system will process the CSV.

**Please note:** If your CSV contains too many users, it may not be able to provide a preview, but you can still select to 'add' the new accounts for all included in the file.

5. The system will take a few minutes to process the CSV, do not click away while this takes place.

If successful, the accounts created will be lsited on screen:



If an error is given, it should indicate what the issue was so you can recitfy this in the file before trying to import this again. e.g. required fields were missing, data not in the expected format to be read etc

6. Check that the profiles can be found in People and/or are listed on the admin side.

7. Repeat all steps as necessary for batches of other new users.

Here is a video of an import being run.
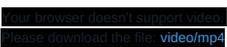


## Optional: Force users to set a new password on login

Following the steps above is sufficient to ensure that each new user added by the CSV can be emailed a random password to log in with. (if the 'Email login details when the password has changed or was generated' option is chosen)

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 enter '1' for each row.

1 = yes, and means the system will turn on the 'change password next time' option for those users:

| username | firstname | surname | email | change password next time |
|----------|-----------|---------|-------|---------------------------|
| **User1** | Alice | Johnson | hannah.door@claromentis.com | 1 |
| **User2** | Peter | Stuart | test2@test.com | 1 |
| **User3** | Kevin | Miles | test3@test.com | 1 |
| **User4** | Susan | Carey | test4@test.com | 1 |
| **User5** | Marina | Smith | test5@test.com | 1 |
| **User6** | Jessica | Fredericks | test6@test.com | 1 |
| **User7** | Scott | Harpenden | test7@test.com | 1 |

So once the CSV import is finished, user accounts will have been created, emailed their login details, but once they log in the first time, they are prompted to set their own to use going forward.

Your browser doesn't support video.
Please download the file: video/mp4

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