Exporting user information

Once your intranet has been in use and user information has been added to it over time, there may be situations where you need to get an overview of what has been filled out in fields across user profiles.

An export of data from People to a CSV can be performed to assist with this, and it is the fastest way to answer questions about user information.

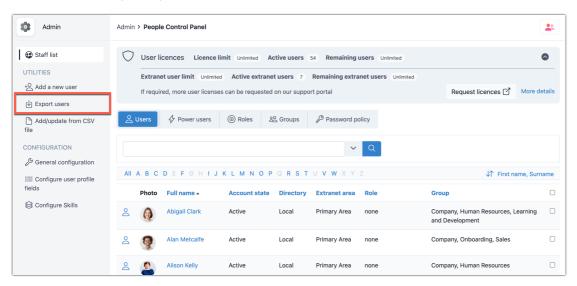An export can be needed for various reasons, but common use cases are:

- To highlight which users have empty fields so these can be targeted for update (either by asking the user to fill these out themselves or a bulk import by a People administrator)
- To create the correct CSV template for use in a bulk import
- To check the data that has been entered by users into the fields is appropriate
- To create a CSV of user data for company records or to store elsewhere
- To assist with support issues or investigations (account state, which Roles or Groups all users are in, etc)

This guide will cover the steps to create an export.

Creating an export

An application administrator of the People application can perform exports of user data at any time.
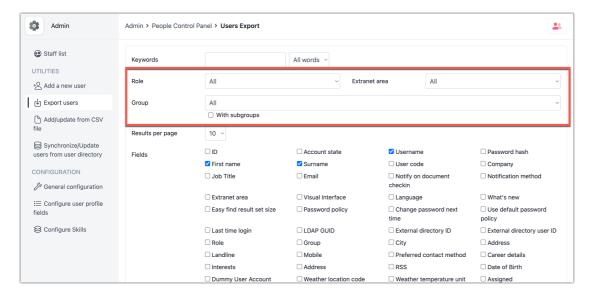
1. Head to Admin > People > Export Users

2. Decide if you want to export all users or just those in a specific extranet, Role or Group.

If you want to export all users, leave the filters as they are because they are 'all' by default.

Please note: Blocked users will appear in exports regardless of the options chosen here, and that is expected.
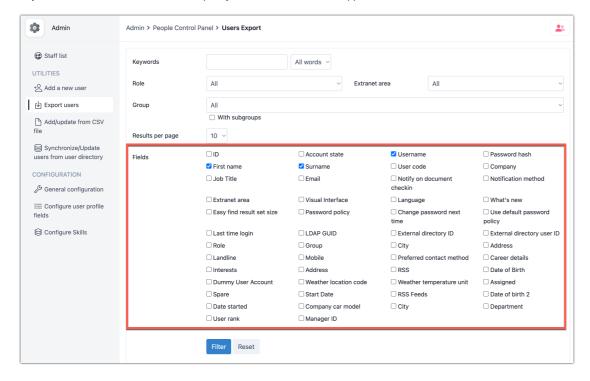

3. Select the fields you wish to include in the export

You only need to select the fields you are interested in here; selecting all fields or a lot at once can cause the export to fail.
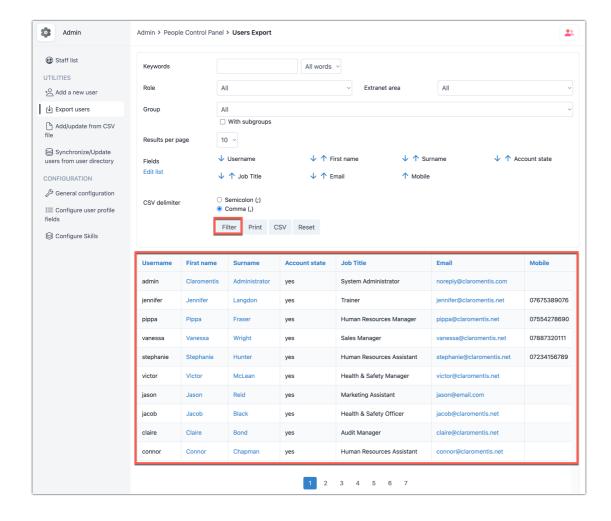
We strongly recommend leaving username, first name and last name selected (as they are by default) so that it's easy to identify which user is on each row in the CSV and avoid any misidentification of the data.

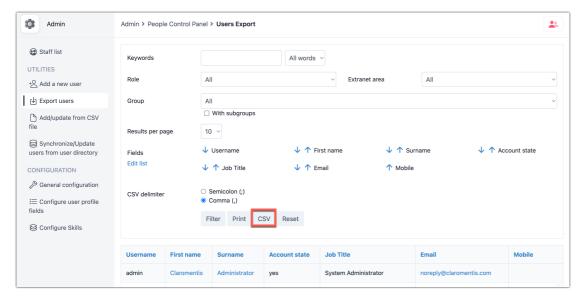Any custom-created fields added to People by administrators will also appear here for selection.

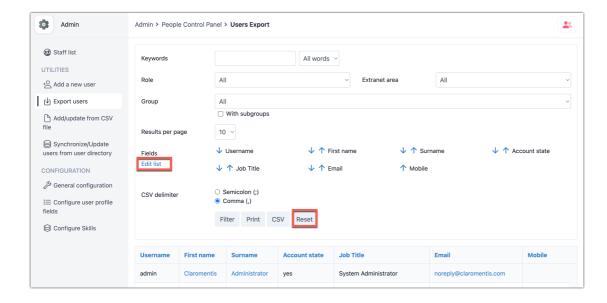**4.** Click the 'Filter' button

A preview of the information that will be created in a CSV will be shown at the bottom of the screen.

5. If you are happy with your selection, click 'CSV' to download the information to your device.

5a. If you want to change the included fields, you can click 'edit list' to do so, or 'reset' to start from scratch before choosing to download this again.

6. Open the downloaded CSV locally to view the contents and assist your use case

username	firstname	surname	account state	job title	email	[m]usr_mobile
admin	Claromentis	Administrator	yes	System Administrator	noreply@claromentis.com	
jennifer	Jennifer	Langdon	yes	Trainer	jennifer@claromentis.net	7675389076
pippa	Pippa	Fraser	yes	Human Resources Manager	pippa@claromentis.net	7554278690
vanessa	Vanessa	Wright	yes	Sales Manager	vanessa@claromentis.net	7887320111
stephanie	Stephanie	Hunter	yes	Human Resources Assistant	stephanie@claromentis.net	7234156789
victor	Victor	McLean	yes	Health & Safety Manager	victor@claromentis.net	
jason	Jason	Reid	yes	Marketing Assistant	jason@email.com	
jacob	Jacob	Black	yes	Health & Safety Officer	jacob@claromentis.net	
claire	Claire	Bond	yes	Audit Manager	claire@claromentis.net	
connor	Connor	Chapman	yes	Human Resources Assistant	connor@claromentis.net	
anne	Anne	Wilkins	yes	Sales Director	anne@claromentis.net	
charles	Charles	Johnston	yes	Marketing Director	charles@claromentis.net	
dan	Dan	Butler	yes	Support Technician	dan@claromentis.net	
james	James	Terry	yes	North America Senior Sales	james@claromentis.net	
joanne	Joanne	Thomson	yes	Support Technician	joanne@claromentis.net	
john	John	Vance	yes	Finance Executive	john@claromentis.net	
joshua	Joshua	Tucker	yes	Marketing Executive	joshua@claromentis.net	
phil	Phil	Lawrence	yes	Developer	phil@claromentis.net	
simon	Simon	Walker	yes	Developer	simon@claromentis.net	
sonia	Sonia	Hodges	yes	Training Coordinator	sonia@claromentis.net	
victoria	Victoria	Allan	yes	Finance Executive	victoria@claromentis.net	
dave	Dave	Arril	yes	Head Of Sales	dave@claromentis.net	
barclay	Barclay	Martin	yes	Sales & Training Manager	barclay@claromentis.com	
nigel	Nigel	Davies	yes	Sales Director	nigel@claromentis.net	
rob	Robert	Reith	yes	Managing Director	rob@claromentis.net	
sameer	Sameer	Arora	yes		sameer@claromentis.net	
mike	Michael	Christian	yes	Information Architect	mike@claromentis.net	
demo	Demo	Account	yes		demo@claromentis.net	

☐ Tip: Use the 'find' function in your chosen program to locate information or users easily

If you will be using the CSV to perform a bulk import, make sure to follow the advice outlined in our guide to adequately prepare this to be successful.

7. Repeat the steps to perform other exports and fulfil different use cases.

The fields exported and how the CSV is used offline will be different depending on what you are trying to achieve.