

Create New Users

Introduction

Depending on your license limit, you will be able to add as many users to the Claromentis system as needed.

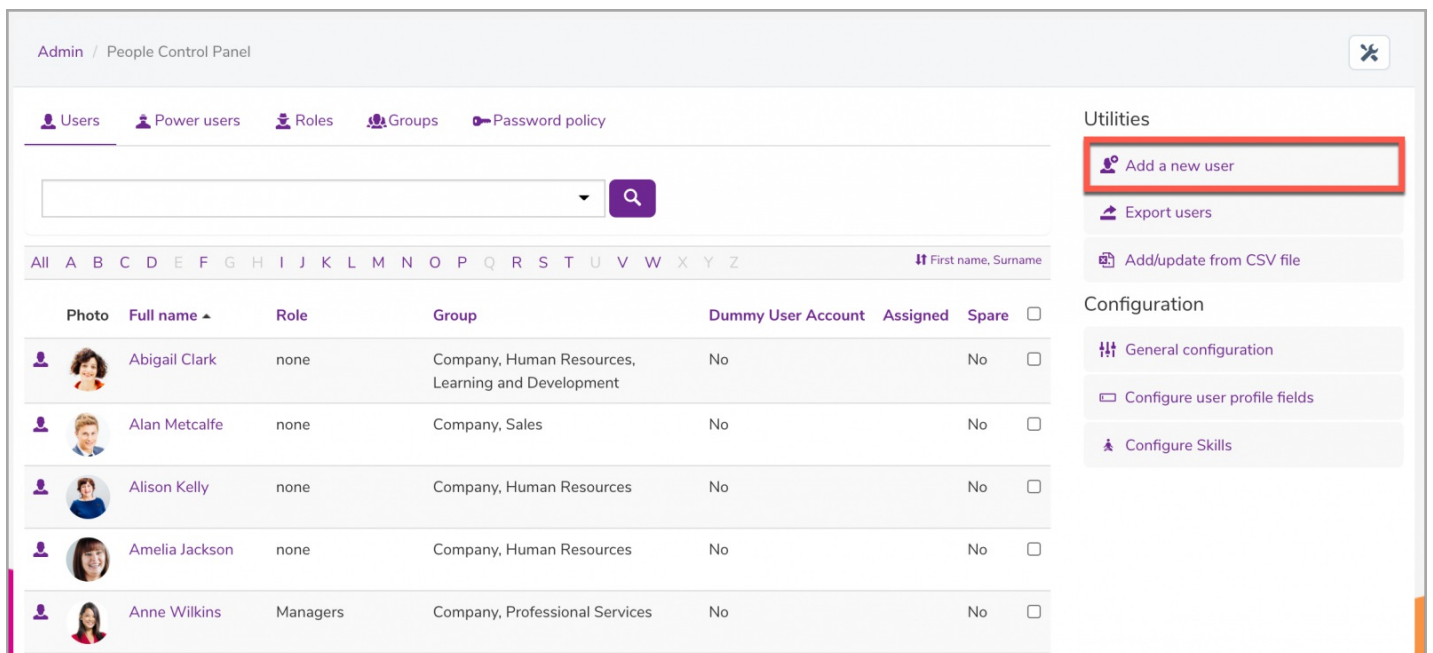
Here we will provide steps on how to add users where you have the option to either add new users individually or in bulk.

The instructions below are outlined in the video.






Adding a single user

A (Local) user can be manually added by following the steps below.

1. Head to **Admin > People**.
2. From the People admin panel, select **+ Add a new user**.



The screenshot shows the 'Admin / People Control Panel' interface. At the top, there are navigation tabs for 'Users', 'Power users', 'Roles', 'Groups', and 'Password policy'. Below these is a search bar with a dropdown menu and a search icon. A horizontal menu with letters A through Z is visible, along with a sort icon and the text 'First name, Surname'. The main area contains a table of users with columns for Photo, Full name, Role, Group, Dummy User Account, Assigned, and Spare. The 'Add a new user' button in the Utilities section is highlighted with a red box.

Photo	Full name	Role	Group	Dummy User Account	Assigned	Spare
	Abigail Clark	none	Company, Human Resources, Learning and Development	No		No <input type="checkbox"/>
	Alan Metcalfe	none	Company, Sales	No		No <input type="checkbox"/>
	Alison Kelly	none	Company, Human Resources	No		No <input type="checkbox"/>
	Amelia Jackson	none	Company, Human Resources	No		No <input type="checkbox"/>
	Anne Wilkins	Managers	Company, Professional Services	No		No <input type="checkbox"/>

3. From here, you can fill out the available fields to build the user's profile.



- Edit user information**
- Role
- Group
- Org chart
- Other settings

User code

Upload image

Last time login (Never)

Account state Enabled Disabled

Email log-in details

Assign user to extranet area

Username*

Password* Generate random password

Confirm Password*

First name*

Surname*

Company

Job Title

Email*

Mobile

Landline

Address

Date of Birth

Dummy User Account

Assigned

Spare

Preferred contact method

Career details

Interests

Date of birth 2

Date started 2

Company car model*

Default notification method None In-system Push Email

Twitter

To complete the profile, you will have to add in the required information:

- First name
- Last name
- Username
- Password (You can use the 'generate a random password' for use)
- Email address

From the user account, you can also enable/disable the account, set the Extranet area for the user, as well as, send an email notification containing the user's login credentials.

Check the 'email log in details box' and click 'update' to save, triggering the email to the user.

Account state Enabled Disabled Email log-in details

Assign user to extranet area Primary Area ▼

Adding in multiple users

Users can be added in bulk using a CSV that contains the new users' information by following the steps below.

1. Head to **Admin > People**.
2. From the People admin panel, select **Add/update from CSV file** to import multiple users at once using a CSV.

Admin / People Control Panel ✕

[Users](#) [Power users](#) [Roles](#) [Groups](#) [Password policy](#)

Q

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ↑ First name, Surname

Photo	Full name ▲	Role	Group	Dummy User Account	Assigned	Spare	
	Abigail Clark	none	Company, Human Resources, Learning and Development	No		No	<input type="checkbox"/>
	Alan Metcalfe	none	Company, Sales	No		No	<input type="checkbox"/>
	Alison Kelly	none	Company, Human Resources	No		No	<input type="checkbox"/>
	Amelia Jackson	none	Company, Human Resources	No		No	<input type="checkbox"/>
	Anne Wilkins	Managers	Company, Professional Services	No		No	<input type="checkbox"/>

Utilities

[Add a new user](#)

[Export users](#)

[Add/update from CSV file](#)

Configuration

[General configuration](#)

[Configure user profile fields](#)

[Configure Skills](#)

3. You will be able to upload a CSV file containing users data from your device:

Admin / People Control Panel / Mass add/update users 📄

Choose CSV file with users data Choose File No file chosen ←

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.**

Submit

Tip: The easiest way to ensure the CSV data is correct is to select the **Export users** option where you will be able to export an existing list of users. The export will include the symbolic names and data format for you to use/follow as a template when creating your CSV.

The screenshot shows the 'Admin / People Control Panel' interface. At the top, there are navigation tabs for 'Users', 'Power users', 'Roles', 'Groups', and 'Password policy'. Below these is a search bar and a list of users. On the right side, there is a 'Utilities' section with three options: 'Add a new user', 'Export users' (highlighted with a red box), and 'Add/update from CSV file'. Below that is a 'Configuration' section with three options: 'General configuration', 'Configure user profile fields', and 'Configure Skills'.

Photo	Full name	Role	Group	Dummy User Account	Assigned	Spare
	Abigail Clark	none	Company, Human Resources, Learning and Development	No	No	<input type="checkbox"/>
	Alan Metcalfe	none	Company, Sales	No	No	<input type="checkbox"/>
	Alison Kelly	none	Company, Human Resources	No	No	<input type="checkbox"/>
	Amelia Jackson	none	Company, Human Resources	No	No	<input type="checkbox"/>
	Anne Wilkins	Managers	Company, Professional Services	No	No	<input type="checkbox"/>

When exporting users, check the following fields and export the data to a CSV.

The screenshot shows the 'Admin / People Control Panel / Users Export' configuration page. It features several filter options: 'Keywords' (text input), 'Role' (dropdown), 'Group' (dropdown), 'Extranet area' (dropdown), and 'Results per page' (dropdown). Below these are two columns of checkboxes for selecting fields to export. The 'Filter' button is highlighted with a red arrow.

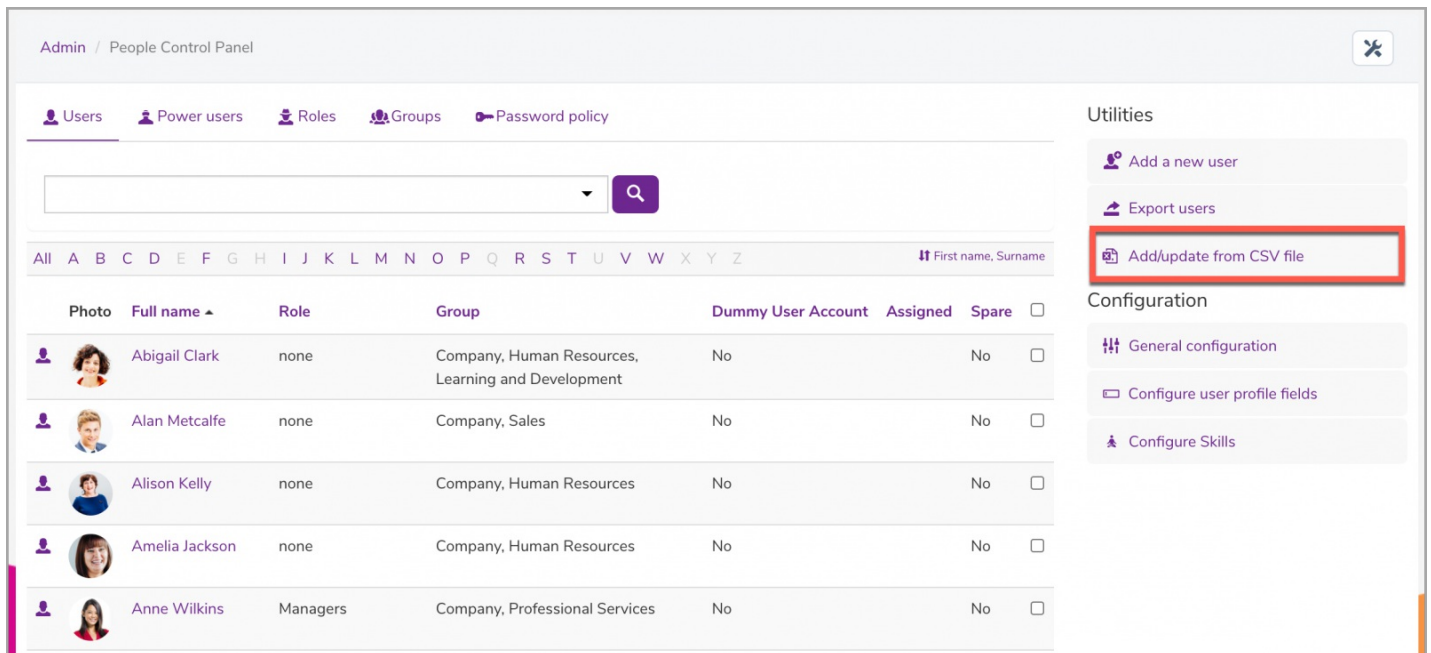
Fields	Fields	Fields	Fields
<input type="checkbox"/> ID	<input type="checkbox"/> Account state	<input checked="" type="checkbox"/> Username	<input type="checkbox"/> Password hash
<input checked="" type="checkbox"/> First name	<input checked="" type="checkbox"/> Surname	<input type="checkbox"/> User code	<input type="checkbox"/> Company
<input type="checkbox"/> Job Title	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Notify on document checkin	<input type="checkbox"/> Notification method
<input type="checkbox"/> Extranet area	<input type="checkbox"/> Visual Interface	<input type="checkbox"/> Language	<input type="checkbox"/> What's new
<input type="checkbox"/> Easy find result set size	<input type="checkbox"/> Password policy	<input type="checkbox"/> Change password next time	<input type="checkbox"/> Use default password policy
<input type="checkbox"/> Last time login	<input type="checkbox"/> LDAP GUID	<input type="checkbox"/> Directory	<input type="checkbox"/> External id
<input type="checkbox"/> Role	<input type="checkbox"/> Group	<input type="checkbox"/> City	<input type="checkbox"/> Address
<input type="checkbox"/> Landline	<input type="checkbox"/> Mobile	<input type="checkbox"/> Preferred contact method	<input type="checkbox"/> Career details
<input type="checkbox"/> Interests	<input type="checkbox"/> Address	<input type="checkbox"/> RSS	<input type="checkbox"/> Date of Birth
<input type="checkbox"/> Dummy User Account	<input type="checkbox"/> Weather location code	<input type="checkbox"/> Weather temperature unit	<input type="checkbox"/> Assigned
<input type="checkbox"/> Spare	<input type="checkbox"/> Start Date	<input type="checkbox"/> RSS Feeds	<input type="checkbox"/> Date of birth 2
<input type="checkbox"/> Date started 2	<input type="checkbox"/> Company car model	<input type="checkbox"/> User rank	<input type="checkbox"/> Manager ID

When creating new users, please ensure that the following mandatory fields are present:

- Username
- Firstname
- Surname
- Password (rename this to 'password' in your CSV from 'password hash')
- Email

On your local PC, fill out the CSV with the new user information.

Once complete, you can re-upload this with the new user data using the **Add/Edit from CSV** option.



The screenshot shows the 'Admin / People Control Panel' interface. At the top, there are navigation tabs for 'Users', 'Power users', 'Roles', 'Groups', and 'Password policy'. Below these is a search bar and a list of users. On the right side, there is a 'Utilities' section with three options: 'Add a new user', 'Export users', and 'Add/update from CSV file'. The 'Add/update from CSV file' option is highlighted with a red box. Below the Utilities section is a 'Configuration' section with three options: 'General configuration', 'Configure user profile fields', and 'Configure Skills'.

Photo	Full name	Role	Group	Dummy User Account	Assigned	Spare	
	Abigail Clark	none	Company, Human Resources, Learning and Development	No		No	<input type="checkbox"/>
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	Anne Wilkins	Managers	Company, Professional Services	No		No	<input type="checkbox"/>

In Claromentis v8.13.17+ there is a new feature that allows new users to be created, random passwords to be generated by the system and this emailed to them (rather than the manual process in earlier versions) - read more [here](#)

Using Add/Edit from CSV option

You can use this same method of exporting certain user fields and then re-uploading to edit users.

(This requires the inclusion of at least the username column so users can be identified by the system).

For more information on updating profile fields using a CSV, check out our article [here](#).

If errors are encountered on import, check the data entered into the column is expected for each field type.

e.g. Date type field - YYYYMMDD (no slashes, hyphens etc).

If you are unsure of the data entry required for a field please submit a [support ticket](#).