Create New Users

Introduction

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

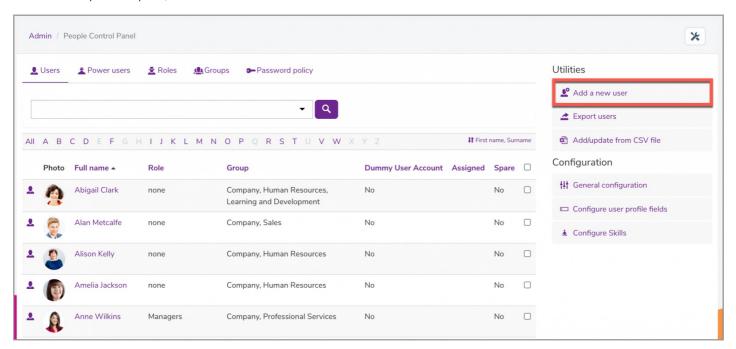
Here we will provide steps on how to add users where you have the option to either add new users individually or in bulk.

The instructions below are outlined in the video.

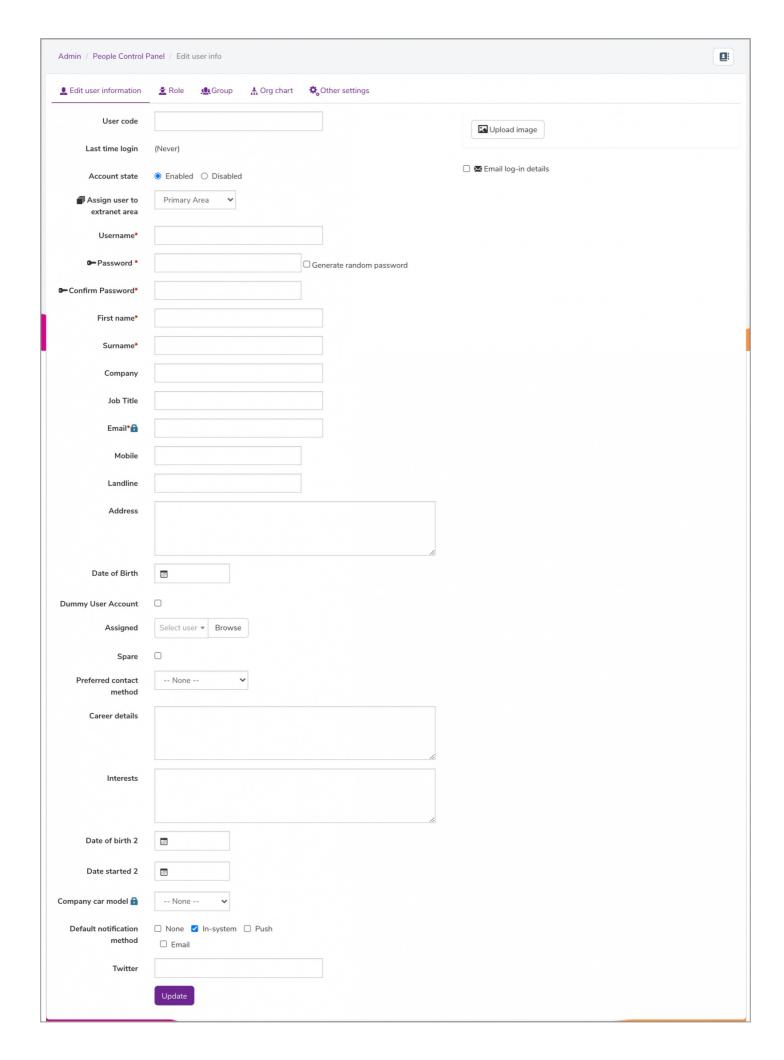
Adding a single user

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.



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



- 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.

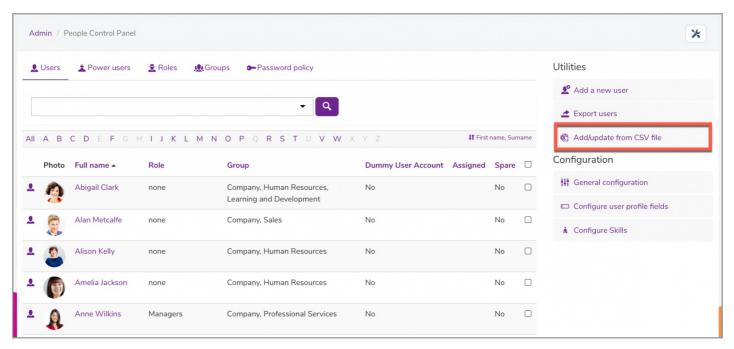
Check the 'email log in details box' and click 'update' to save, triggering the email to the user.



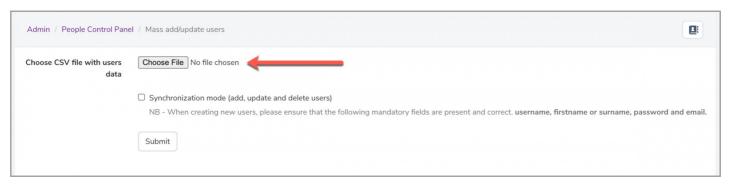
Adding in multiple users

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

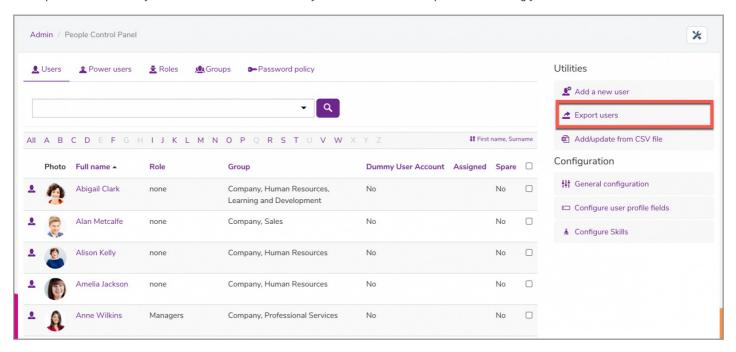
- 1. Head to Admin > People.
- 2. From the People admin panel, select Add/update from CSV file to import multiple users at once using a CSV.



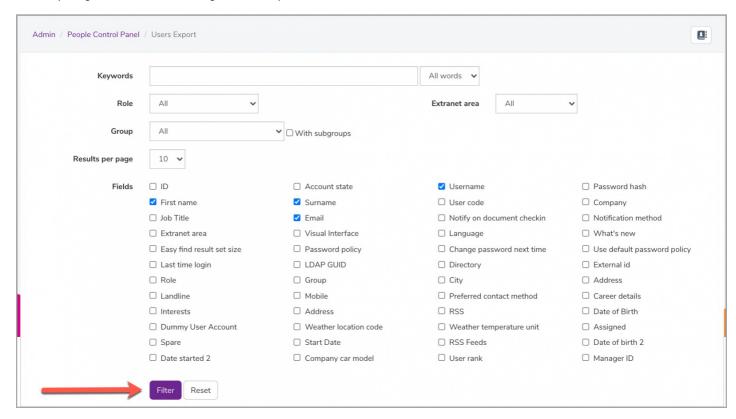
3. You will be able to upload a CSV file containing users data from your device:



□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.



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

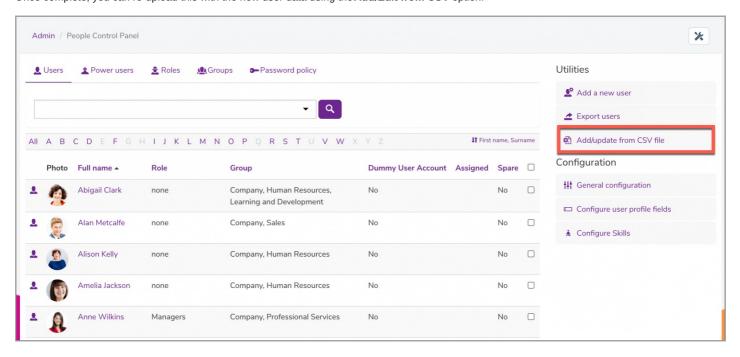


When creating new users, please ensure that the following mandatory fields are present:

- 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.



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 asupport ticket.

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