# **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.

dmin / P	People Control Panel					>
Users	2 Power users	🛓 Roles 🛛 🏨 Grou	Ips Password policy			Utilities
						L Add a new user
			<b>-</b> و			🛃 Export users
A B	CDEFGH	IJKLMN	O P Q R S T U V W X	Y Z It First	name, Surname	ᆆ Add/update from CSV file
Photo	Full name 🔺	Role	Group	Dummy User Account Assigned	Spare	Configuration
9	Abigail Clark	none	Company, Human Resources, Learning and Development	No	No 🗆	뷰 General configuration
	Alan Metcalfe	none	Company, Sales	No	No 🗆	<ul> <li>Configure user profile fields</li> <li>Configure Skills</li> </ul>
9	Alison Kelly	none	Company, Human Resources	No	No 🗆	
Ø	Amelia Jackson	none	Company, Human Resources	No	No 🗆	
	Anne Wilkins	Managers	Company, Professional Services	No	No 🗆	

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

1 Statuse Holomoto       2 Note       0 Open rel 0 Open relings         User cole       Image: Cole open relings       Image: Cole open relings         Account cole       Enclose of Doubled       Image: Cole open relings         Account cole       Enclose of Doubled       Image: Cole open relings         Image: Cole open relings       Image: Cole open relings       Image: Cole open relings         Image: Cole open relings       Image: Cole open relings       Image: Cole open relings         Image: Cole open relings       Image: Cole open relings       Image: Cole open relings         Image: Cole open relings       Image: Cole open relings       Image: Cole open relings         Image: Cole open relings       Image: Cole open relings       Image: Cole open relings         Image: Cole open relings       Image: Cole open relings       Image: Cole open relings         Image: Cole open relings       Image: Cole open relings       Image: Cole open relings         Image: Cole open relings       Image: Cole open relings       Image: Cole open relings         Image: Cole open relings       Image: Cole open relings       Image: Cole open relings         Image: Cole open relings       Image: Cole open relings       Image: Cole open relings         Image: Cole open relings       Image: Cole open relings       Image: Cole open relings         Imag	Admin / People Control	ranel / Edit user into	l
Lattine ligit Account late Acity a light of a blacked Privary Acit Cervent late Acity a light of a blacked Privary Acit Cervent late Cervent late C	L Edit user information	🚊 Role 🏨 Group 🛔 Org chart 🔅 Other settings	
Lattine logi       Pred         Account state       Enable © Duabed            • Enable © Duabed           • Enable © Duabed             • Enable © Duabed           • Enable © Duabed             • Password           • Imary Ara             • Imary Ara           • Imary Ara	User code		
A caigu out is the impart of a marked in the impact of a marked i	Last time login		
ottom tare	Account state	Enabled O Disabled      Disabled	
• Password • <ul> <li>Centrar Password •</li> <li>First tame •</li> <li>Centrar Password •</li> <li>First tame •</li> <li>Centrar Password •</li> <li>Centrar P</li></ul>		Primary Area 🗸	
Confirm Passwort*	Username*		
First name*	Password *	Generate random password	
Sumane*	- Confirm Password*		
Company   Job Tile   Ensil*®   Ensil*®   Image: Select user * Browse   Select user * Browse   Select user * Browse   Select user * Browse   Image: Select user * Br	First name*		
Job Title   Imail*@   Imail*@   Mobile   Mobile   Landline   Landline   Address   Job Title   Date of Birth   Imail*@   Proferred contact   Imail*@   Imail*@   Date of birth 2   Imail*@   Date of birth 2   Imail*@   Imail*@ <td>Surname*</td> <td></td> <td></td>	Surname*		
Email   Mobie   Mobie   Landine   Address   Address   Obte of Birth   Image: Secture of Browse   Secture of Browse   Secture of Browse   Secture of Browse   Cereer details   Interests   Image: Secture of Birth   Image: Secture of Birth </td <td>Company</td> <td></td> <td></td>	Company		
Mobile   Landline   Address   Address   Date of Birth   Immy User Account   Select user * Browse   Spare   Preferred contact   Immersion   Career details   Interests   Immersion   Date of birth 2   Immersion   Date started 2   Immersion	Job Title		
Landine Landine Address Address Date of Birth  Career details Interest Date of birth 2 Date of	Email* 🔒		
Address   Date of Birkh   Immy User Account   Assigned   Select user * Browse   Spare   Preferred contact   method   Career details   Interests   Date of birkh 2   Date started 2   impany car model 6	Mobile		
Date of Birk   Date of Birk   Date of Birk   Cummy User Account   Sagned   Select user * Browse   Spare   Preferred contact   method   Career details   Interests   Date of birk 12   Date startel2   Image: Spare startel2   Image: Spare startel2	Landline		
burning User Account   Assigned   Spare   Preferred contact method  None ·   Orareer details   Interests   Date of birth 2   Date started 2  None ·	Address		
Dummy User Account   Assigned   Spare   Preferred contact  None ·     Career details   Interests   Date of birth 2   Date started 2   ompany car model A			
Dummy User Account   Assigned   Spare   Preferred contact   • - None • •   Other started 2   Date started 2   ompany car model <b>a</b>	Date of Birth		
Assigned Select user * Browse   Spare •   Preferred contact •   career details •   Interests •   Date of birt 2 •   Date started 2 •   • •			
Spar   Preferred contat method   Career details   Interests   Date of birth 2   Date started 2			
Preferred contact   method     Career details   Interests     Date of birth 2   Date started 2     Image: Started 2 <th></th> <th></th> <th></th>			
method   Career details   Interests   Interests   Date of birth 2   Date started 2   Image: Started 2			
Interests Interests Date of birth 2 Date started 2			
Date of birth 2 Date started 2 ompany car model  None	Career details		
Date of birth 2 Date started 2 ompany car model  None			
Date started 2	Interests		
Date started 2			
ompany car model 🔒 None 🗸	Date of birth 2		
ompany car model 🔒 None 🗸	Date started 2		
method Email			
Twitter	Twitter		

- 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	🗌 🗷 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.

Ad	lmin / P	eople Control Panel						*
	Users	2 Power users	🛓 Roles 🛛 🧟 Grou	Password policy				Utilities
				_				<b>№</b> Add a new user
L				<b>-</b> ַ ַ ַ ַ ַ ַ				🛃 Export users
All	A B	CDEFGH	IJKLMN	O P Q R S T U V W X	Y Z If First	name, Surr	name	國 Add/update from CSV file
	Photo	Full name 🔺	Role	Group	Dummy User Account Assigned	Spare		Configuration
	9	Abigail Clark	none	Company, Human Resources, Learning and Development	No	No		Image: style="text-align: center;">Image: style="text-align: center;"/>Image: style="text-align: style="text-align: center;"/>Image: style="text-align: center
2		Alan Metcalfe	none	Company, Sales	No	No		▲ Configure Skills
•	9	Alison Kelly	none	Company, Human Resources	No	No		
2	Ø	Amelia Jackson	none	Company, Human Resources	No	No		
2	A	Anne Wilkins	Managers	Company, Professional Services	No	No		

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

Admin / People Control Pan	el / Mass add/update users
Choose CSV file with users data	Choose File No file chosen
	<ul> <li>Synchronization mode (add, update and delete users)</li> <li>NB - When creating new users, please ensure that the following mandatory fields are present and correct. username, firstname or surname, password and email.</li> <li>Submit</li> </ul>

**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.

Ad	lmin / Pe	eople Control Panel						*
	Users	2 Power users	達 Roles 🛛 👲 Grou	ups Password policy				Utilities
								🔮 Add a new user
L				▼ Q				🛃 Export users
All	A B	CDEFGH	IJKLMN	OPQRSTUVWX	Y Z If First	t name, Suri	name	வ Add/update from CSV file
	Photo	Full name 🔺	Role	Group	Dummy User Account Assigned	Spare		Configuration
	0	Abigail Clark	none	Company, Human Resources, Learning and Development	No	No		♣♣ General configuration
1	-	Alan Metcalfe	none	Company, Sales	No	No		Configure user profile fields
	100							★ Configure Skills
1	9	Alison Kelly	none	Company, Human Resources	No	No		
2	Ø	Amelia Jackson	none	Company, Human Resources	No	No		
2		Anne Wilkins	Managers	Company, Professional Services	No	No		

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

Admin / People Control Panel	/ Users Export			<b>Q</b> :
Keywords			All words 🗸	
Role	All		Extranet area All	~
Group	All	✓ □ With subgroups		
Results per page	10 🗸			
Fields		Account state	✓ Username	Password hash
	First name	Surname	User code	Company
	🗌 Job Title	🗹 Email	Notify on document checkin	Notification method
	Extranet area	Visual Interface	Language	What's new
	Easy find result set size	Password policy	Change password next time	Use default password policy
	Last time login	LDAP GUID		<ul> <li>External id</li> </ul>
	Role	Group	City	Address
	Landline	Mobile	Preferred contact method	Career details
	□ Interests	Address	C RSS	Date of Birth
	Dummy User Account	Weather location code	Weather temperature unit	Assigned
	Spare	Start Date	RSS Feeds	Date of birth 2
	Date started 2	Company car model	User rank	Manager ID
$\longrightarrow$	Filter Reset			

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.

	Jsers	2 Power users	🛓 Roles 🛛 🧟 Gro	ups Password policy				Utilities
								Le Add a new user
				<u>-</u> ע				📥 Export users
I	A B	CDEFGH	IJKLMN	0 P Q R S T U V W X	Y Z If First	name, Sur	rname	환 Add/update from CSV file
	Photo	Full name 🔺	Role	Group	Dummy User Account Assigned	Spare		Configuration
	0	Abigail Clark	none	Company, Human Resources, Learning and Development	No	No		╂╂ General configuration
	(all all all all all all all all all all	Alan Metcalfe	none	Company, Sales	No	No		Configure user profile fields
•	(i)							▲ Configure Skills
		Alison Kelly	none	Company, Human Resources	No	No		
	Ø	Amelia Jackson	none	Company, Human Resources	No	No		
	•	Anne Wilkins	Managers	Company, Professional Services	No	No		

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.

Created on 1 February 2018 by Hannah Door. Last modified on 20 August 2024 Tags: intranet, people, user guide, add, user, new user