



## CSV: Updating user profile fields

In this guide, we will outline the process of exporting & updating profile fields by importing a CSV file in the People application.

Using this method will update any profile field you require and is most useful when changes are needed en masse across a large number of users.

In this scenario, we will bulk update a field created to host phone number information - 'Mobile' - so it reflects the current information for each user that there is data for.

For more information on User Profile Fields, check out our guide [here](#).

### Exporting users

The first stage of updating a user profile field is to export user information via CSV. This will give you the current information that is attached to each user on the system.

At this point we do not wish to create large export that includes superfluous information, instead, we only want to include the bare minimum fields required for the import to run successfully alongside the field(s) we want to update.

1. Head to **Admin > People**, and select **Export users**. This area will show you a list of all available (hardcoded & custom-made) fields that can be updated.

A screenshot of the 'People Control Panel' interface. The top navigation bar includes 'Admin / People Control Panel' and a search icon. Below the navigation, there are tabs for 'Users', 'Power users', 'Roles', 'Groups', and 'Password policy'. A search bar is present. 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 the Utilities section is a 'Configuration' section with three options: 'General configuration', 'Configure user profile fields', and 'Configure Skills'. The main area of the page displays a table of users with columns for 'Photo', 'Full name', 'Role', 'Group', 'Dummy User Account', 'Assigned', and 'Spare'. The table lists five users: Abigail Clark, Alan Metcalfe, Alison Kelly, Amelia Jackson, and Anne Wilkins.

2. Choose the relevant fields including the field you wish to update and select **Filter**.

By default, 'Username', 'First name' and 'Surname' will be selected. It is best practice to include first name and surname in your exports, as this allows you to easily identify each user when making edits and lowers the possibility of errors in data entry.

For this example, the 'Mobile' field has been selected as well as the User 'ID' field to help identify the user for each column.

The screenshot shows the 'Users Export' configuration page. At the top, there is a breadcrumb trail: 'Admin / People Control Panel / Users Export'. Below this, there are several filter options: 'Keywords' (text input), 'Role' (dropdown), 'Group' (dropdown), 'Extranet area' (dropdown), and 'Results per page' (dropdown). The 'Fields' section contains a grid of checkboxes for various user attributes. The 'ID' and 'Mobile' fields are checked. At the bottom left, there are 'Filter' and 'Reset' buttons.

**Please note:** The username must be included in any CSV re-import so the system knows who to tie updates to, upload will fail without the username being included.

The CSV export will include both active & blocked accounts. You can include the 'Account State' option when filtering the CSV so you can determine the status of each account. 'YES' = active and 'NO' = blocked.

### 3. Download the data by selecting CSV.

The screenshot shows the 'Users Export' configuration page with the 'Fields' section updated. The selected fields are 'ID', 'Username', 'First name', and 'Surname'. The 'CSV delimiter' is set to 'Comma (,)' and is highlighted with a red circle. At the bottom, there are 'Filter', 'Print', 'CSV', and 'Reset' buttons.

**Tip:** The order of the columns will be reflected as per the field list. You can change the column order by using the blue arrows next to the field names.

## Updating CSV

When opening the CSV, the selected fields will display the current information for each user. The column title will reflect the **Symbolic Name** of the profile field.

When editing the CSV file in your chosen external program, there are certain caveats when using specific providers - in general, we recommend avoiding Microsoft Excel due to the issues it can cause in data formatting and subsequent re-import.

Excel can be used successfully but your team will need to be vigilant about data entry, ensure the absence of excel processing and export the file from Excel in CSV format to ensure successful re-import into the Intranet.

More information on alternatives can be found [here](#).

### 1. Preparing a CSV file

In the downloaded CSV, enter the new data in the relevant column(s) for the users. This is the stage where the CSV can be edited where a change is required.

In this example, the symbolic name used for the Mobile field is `[m]usr_mobile`

| id | username  | firstname   | surname       | [m]usr_mobile      |
|----|-----------|-------------|---------------|--------------------|
| 1  | admin     | Claromentis | Administrator |                    |
| 10 | jennifer  | Jennifer    | Langdon       | +44 (0)1273 666355 |
| 11 | pipa      | Pippa       | Fraser        | +44 (0)1273 666355 |
| 12 | vanessa   | Vanessa     | Wright        | +44 (0)1273 666355 |
| 13 | stephanie | Stephanie   | Hunter        | +44 (0)1273 666355 |
| 14 | victor    | Victor      | McLean        | +44 (0)1273 666355 |
| 15 | jason     | Jason       | Reid          | +44 (0)1273 666355 |
| 16 | jacob     | Jacob       | Black         | +44 (0)1273 666355 |
| 17 | claire    | Claire      | Bond          | +44 (0)1273 666355 |
| 18 | connor    | Connor      | Chapman       | +44 (0)1273 666355 |
| 23 | anne      | Anne        | Wilkins       | +44 (0)1273 666355 |
| 24 | charles   | Charles     | Johnston      | +44 (0)1273 666355 |
| 25 | dan       | Dan         | Butler        | +44 (0)1273 666355 |
| 26 | james     | James       | Terry         | +44 (0)1273 666355 |
| 27 | joanne    | Joanne      | Thomson       | +44 (0)1273 666355 |
| 28 | john      | John        | Vance         | +44 (0)1273 666355 |
| 29 | joshua    | Joshua      | Tucker        | +44 (0)1273 666355 |
| 30 | phil      | Phil        | Lawrence      | +44 (0)1273 666355 |

**Please note:** The symbolic name is important in identifying the profile field. The symbolic name should not be altered when editing the CSV.

Copying/pasting information from your repository into the CSV is fine, vigilance is key to avoid incorrect data entry whilst getting the CSV ready for import.

The new field information should all be entered in the same format, and the format required will depend on the [type of the field itself](#).

In the 'Mobile' example the field type is 'string' therefore any combination of letters and numbers is accepted and will be read by the system successfully.

Other types have different expectations however, for 'date' type fields the data entry is required to be YYYYMMDD with no hyphens, slashes etc separating the numbers.

Check out the list of data entry expectations per field type [here](#).

## 2. Save this file as a CSV.

Depending on the provider you used to edit the CSV, the option to save the file as a CSV may be deeper in its settings or require clicking 'Save As' first to see CSV as an option.

If the file is not saved in CSV format the import to the Intranet will fail.

## Importing CSV

The last stage of updating a user profile field is to re-import the updated CSV. The import process will replace the existing data based on information in the CSV.

1. Head back to **Admin > People**, and select **Add/Update from CSV file**:

Admin / People Control Panel

Users Power users Roles Groups Password policy

Utilities

- Add a new user
- Export users
- Add/update from CSV file

Configuration

- General configuration
- Configure user profile fields
- Configure Skills

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

2. Select **Choose File** or use our drag & drop feature to upload the CSV

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

**Reminder:** Ensure the Synchronisation mode is *not* selected when importing a CSV that is only to update information.

Synchronisation mode should only be used in situations where **mass deletions** are taking place, as with this enabled the system will copy everything from the CSV imported, deleting all other user-profiles and information not included in it.

3. Check the **Update** column for all relevant users.

The Update column indicates the user found in the system and in the uploaded CSV. If the option is not available, please ensure the user exists in both the system and CSV (Username or User ID should match in both areas).

Admin / People Control Panel / Mass add/update users

Status value can be: Error, New, Update, Old.  
 Old - user found in the system but not found in the uploaded CSV.  
 Update - user found in the system and found in the uploaded CSV.  
 New - user not found in the system and found in the uploaded CSV.  
 Error - user with invalid field set for update and insert actions.

NB - When creating new users, please ensure that the following mandatory fields are present and correct. **username, firstname or surname, password and email.**

| Update                              | Sync Groups              | Sync Roles               | Subscribe to all news channels | Status | Username  | Firstname | Surname | Id | Metadata: Mobile   |
|-------------------------------------|--------------------------|--------------------------|--------------------------------|--------|-----------|-----------|---------|----|--------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>       | Update | jennifer  | Jennifer  | Langdon | 10 | +44 (0)1273 666355 |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>       | Update | pipa      | Pippa     | Fraser  | 11 | +44 (0)1273 666355 |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>       | Update | vanessa   | Vanessa   | Wright  | 12 | +44 (0)1273 666355 |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>       | Update | stephanie | Stephanie | Hunter  | 13 | +44 (0)1273 666355 |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>       | Update | victor    | Victor    | McLean  | 14 | +44 (0)1273 666355 |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>       | Update | jason     | Jason     | Reid    | 15 | +44 (0)1273 666355 |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>       | Update | jacob     | Jacob     | Black   | 16 | +44 (0)1273 666355 |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>       | Update | claire    | Claire    | Bond    | 17 | +44 (0)1273 666355 |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>       | Update | connor    | Connor    | Chapman | 18 | +44 (0)1273 666355 |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>       | Update | anne      | Anne      | Wilkins | 23 | +44 (0)1273 666355 |

⚠ If your CSV contains a lot of users the system may not be able to handle all the changes in a single import. To combat this, you will need to import the CSV in smaller batches of users and/or exclude blocked accounts from the CSV so only active accounts are updated. We recommend batching less than 500 users at a times.

**i** **Group and Role Sync** can only add newly identified groups or roles to each user. The sync process is not designed for Groups or Roles removal due to its destructive nature and cannot be undone. If you need to remove users from certain groups and roles, this can be performed in **Admin > People** by editing Groups or Roles.

4. Select the **Confirm Submit** button (found on the bottom of the page) to confirm the changes.

Once the CSV has been successfully imported, you will see a list of the changes applied for each user.

Admin / People Control Panel / Mass add/update users

jennifer (First Name: Jennifer, Surname: Langdon) User successfully updated  
 pippa (First Name: Pippa, Surname: Fraser) User successfully updated  
 vanessa (First Name: Vanessa, Surname: Wright) User successfully updated  
 stephanie (First Name: Stephanie, Surname: Hunter) User successfully updated  
 victor (First Name: Victor, Surname: McLean) User successfully updated  
 jason (First Name: Jason, Surname: Reid) User successfully updated  
 jacob (First Name: Jacob, Surname: Black) User successfully updated  
 claire (First Name: Claire, Surname: Bond) User successfully updated  
 connor (First Name: Connor, Surname: Chapman) User successfully updated  
 anne (First Name: Anne, Surname: Wilkins) User successfully updated  
 charles (First Name: Charles, Surname: Johnston) User successfully updated  
 dan (First Name: Dan, Surname: Butler) User successfully updated  
 james (First Name: James, Surname: Terry) User successfully updated

Tip: You can find the total number of updated users at the bottom of this list.

Number of updated users **71**

To check information has been updated successfully, head to any user profile that was included in the CSV and confirm the fields have been updated as expected.

To ensure fields show on user profiles, you will need to **add them to display** in the 'View Profile Page' area.

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](#)

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