

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 green checkmark icon. Below the navigation bar, 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 two options: 'Add a new user' and 'Export users'. The 'Export users' option is highlighted with a red rectangle. Below the 'Utilities' section, there is a 'Configuration' section with three options: 'General configuration', 'Configure user profile fields', and 'Configure Skills'. The main area of the interface 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' interface. At the top, there's a breadcrumb trail: 'Admin / People Control Panel / Users Export'. Below this, there are several filter sections: 'Keywords' with a text input and a dropdown set to 'All words'; 'Role' with a dropdown set to 'All'; 'Group' with a dropdown set to 'All' and a checkbox for 'With subgroups'; and 'Results per page' with a dropdown set to '10'. The 'Extranet area' is also set to 'All'. The 'Fields' section contains a grid of checkboxes for various user attributes. The 'ID' and 'Mobile' fields are checked. Other visible fields include 'First name', 'Surname', 'Username', 'Password hash', 'User code', 'Company', 'Job Title', 'Extranet area', 'Easy find result set size', 'Last time login', 'Role', 'Landline', 'Interests', 'Dummy User Account', 'Spare', 'Date started 2', 'Account state', 'Email', 'Visual Interface', 'Password policy', 'LDAP GUID', 'Group', 'Address', 'Weather location code', 'Start Date', 'Company car model', 'Notify on document checkin', 'Language', 'Change password next time', 'Directory', 'City', 'Preferred contact method', 'RSS', 'Weather temperature unit', 'RSS Feeds', 'User rank', 'Manager ID', 'Notification method', 'What's new', 'Use default password policy', 'External id', 'Address', 'Career details', 'Date of Birth', 'Assigned', 'Date of birth 2', and 'Manager ID'. At the bottom left of the fields section 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.

This screenshot shows the same 'Users Export' interface as the previous one, but with additional changes. The 'Fields' section now shows a list of selected fields: ID, Username, First name, Surname, and Mobile. Each field has a blue double-headed arrow next to it, indicating it can be reordered. The 'CSV delimiter' section shows two options: 'Semicolon (;)' and 'Comma (,)', with 'Comma (,)' selected. At the bottom, there are four buttons: 'Filter', 'Print', 'CSV', and 'Reset'. The 'CSV' button is highlighted with a red rectangle.

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

Search: [] []

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 11 First name, Surname

| 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"/> |

Utilities

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

Configuration

- General configuration
- Configure user profile fields
- Configure Skills

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 | pippa | 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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