

CSV: Updating user profile fields

User profile fields are managed in the '[Configure profile fields](#)' area of the People application.

Information can be placed in these fields about users by users themselves from the 'Edit my profile' area, or by administrators when editing their profiles in Admin > People.

For administrators, it's also possible to bulk import user data to update fields en masse using a CSV, rather than doing this individually on user profiles, or have the users fill these out themselves.

An import can be run at any time by administrators to bulk update fields when necessary.

This guide will cover the steps to prepare and perform a bulk import.

If you have a user sync set up on your site, any mapped fields cannot be updated using the method below as they are controlled by the sync

Step 1: Export user information

The first stage is to export the current user information the system has for the fields you are interested in to a CSV (even if blank)

So, you will need to ensure the field you want to update information for has [already been created](#) in your Intranet.

Creating an export ensures the column formatting for the fields is already correct in the CSV (rather than needing to create the file manually), and the export will include field entries for any user who may already have something filled out.

We do not need to create a large export that includes superfluous information; instead, we need to include the fields we want to update alongside at least 'username' for the system to recognise each user when the CSV is imported.

Reminder: if your site is implementing a user sync, the following steps can only be followed to update fields in bulk that are **NOT** mapped to your external repository. Mapped fields will revert on the next sync if bulk updated using a CSV.

- Head to Admin > People > Export Users

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Staff list

UTILITIES

Add a new user

Export users

Add/update from CSV file

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General configuration

Configure user profile fields

Configure Skills

Admin > People Control Panel

User licences

Licence limit Unlimited

Active users 54

Remaining users Unlimited

Extranet user limit Unlimited

Active extranet users 7

Remaining extranet users Unlimited

If required, more user licenses can be requested on our support portal

Request licences

More details

Users

Power users

Roles

Groups

Password policy

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	Account state	Directory	Extranet area	Role	Group
	Abigail Clark	Active	Local	Primary Area	none	Company, Human Resources, Learning and Development
	Alan Metcalfe	Active	Local	Primary Area	none	Company, Onboarding, Sales
	Alison Kelly	Active	Local	Primary Area	none	Company, Human Resources

- Check the box next to each field you are going to be updating

By default, 'Username', 'First name' and 'Surname' will be selected.

We recommend including these in all exports, as it reduces errors in data entry when adding your information to the CSV ready for import, as users are easily identifiable by this, rather than just the username.

Exports will always include blocked users.

To more easily remove these from the CSV, we recommend also including the 'account state' field so that you can remove blocked accounts before importing the file, if you do not wish to update their information.

e.g. I am going to be updating the Mobile and ext fields for all users. I have chosen these for the export but have also left the default field selections included, as well as 'account state':

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Admin > People Control Panel > Users Export

Keywords

All words

Role

All

Extranet area

All

Group

All

With subgroups

Results per page

10

Fields

☐ ID

☒ First name

☐ Job Title

☒ Account state

☒ Surname

☐ Email

☐ Extranet area

☐ Easy find result set size

☐ Last time login

☐ Role

☐ Landline

☐ Visual Interface

☐ Password policy

☐ LDAP GUID

☐ Group

☒ Mobile

☒ Username

☐ User code

☐ Notify on document checkin

☐ Language

☐ Change password next time

☐ External directory ID

☐ City

☐ Preferred contact method

☐ Password hash

☒ Company

☐ Notification method

☐ What's new

☐ Use default password policy

☐ External directory user ID

☐ Address

☐ Career details

- Click 'filter', and the system will show a preview of what is going to be exported

Tip: You can change the order the fields appear in the CSV by using the blue arrows that now appear next to each

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Admin > People Control Panel > Users Export

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All words

Role

All

Extranet area

All

Group

All

With subgroups

Results per page

10

Fields

ID

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

External directory ID

External directory user ID

Role

Group

City

Address

Landline

Mobile

Preferred contact method

Career details

Interests

Address

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

Company car model

City

Department

User rank

Manager ID

Filter

Reset

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All

Extranet area

All

Group

All

With subgroups

Results per page

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Fields

Username

First name

Surname

Account state

Company

Mobile

Edit list

CSV delimiter

Semicolon (;)

Comma (,)

Filter

Print

CSV

Reset

Username	First name	Surname	Account state	Company	Mobile
admin	Claromentis	Administrator	yes	Claromentis Ltd	
jennifer	Jennifer	Langdon	yes	Claromentis Ltd	
pipa	Pippa	Fraser	yes	Claromentis Ltd	
vanessa	Vanessa	Wright	yes	Claromentis Ltd	
stephanie	Stephanie	Hunter	yes	Claromentis Ltd	07234156789
victor	Victor	McLean	yes	Claromentis Ltd	

- Download the selected data by clicking 'CSV'

This will be saved locally, and you can open it offline to complete the next stage.

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Extranet area

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With subgroups

Results per page

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Fields

Username

First name

Surname

Account state

Company

Mobile

CSV delimiter

Semicolon (;)

Comma (,)

Filter

Print

CSV

Reset

Username	First name	Surname	Account state	Company	Mobile
admin	Claromentis	Administrator	yes	Claromentis Ltd	
jennifer	Jennifer	Langdon	yes	Claromentis Ltd	
pipa	Pippa	Fraser	yes	Claromentis Ltd	

Step 2: Fill out the CSV

Open the CSV you downloaded from Step 1 on your computer.

We recommend not using Microsoft Excel for bulk updates due to the issues it can cause in data formatting and subsequent re-import.

However, Excel can be used successfully with vigilance around data entry, ensuring the absence of Excel processing and ensuring it is exported in CSV format to ensure successful re-import into the Intranet.

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

• Review the users included in the CSV

The CSV will contain blocked user accounts (if these exist on your site) as aforementioned.

If these are not relevant to your updates, remove them from the CSV (they are denoted by 'no' in the 'account state' column)

The 'Account state' column can be removed from your CSV following this, as it has served its purpose not needed for the bulk import.

Next, remove any other user who will not be updating the information, until only those who remain in it are those who are going to be updated.

Please note: We recommend importing CSVs in batches of ~300 users. So if you are hoping to bulk update more than this, split them across several CSVs and import these separately to ensure they all complete and update the users successfully.

username	firstname	surname	company	[m]usr_mobile
admin	Claromentis	Administrator	Claromentis Ltd	
jennifer	Jennifer	Langdon	Claromentis Ltd	
pipa	Pippa	Fraser	Claromentis Ltd	
vanessa	Vanessa	Wright	Claromentis Ltd	
stephanie	Stephanie	Hunter	Claromentis Ltd	07234156789
mikec	Michael	Bennett	ClaroPartner Ltd	
wille	Will	Evergreen	ClaroPartner Ltd	
lucya	Lucy	Adams		
tylerw	Tyler	Williams	OtherPartner Ltd	
lydiad	Lydia	DeWalt	OtherPartner Ltd	
philiph	Phillip	Huxley	OtherPartner Ltd	

- **Perform data entry**

Enter the data you want to update for each user in the relevant column(s) for the users.

Ensure you are entering data in the correct format for the type of field being represented. A list of the expected formats are [here](#).

e.g. A string type field can accept letters and numbers in any combination, but a date type field needs data entered like YYYYMMDD with no hyphens, slashes, etc, separating the numbers to be recognised by the system.

username	firstname	surname	company	[m]usr_mobile
admin	Claromentis	Administrator	Claromentis Ltd	07732123464
jennifer	Jennifer	Langdon	Claromentis Ltd	07675389076
pipa	Pippa	Fraser	Claromentis Ltd	07554278690
vanessa	Vanessa	Wright	Claromentis Ltd	07887320111
stephanie	Stephanie	Hunter	Claromentis Ltd	07234156789
mikec	Michael	Bennett	Claromentis Ltd	07942102845
wille	Will	Evergreen	Claromentis Ltd	07774366451
lucya	Lucy	Adams	Claromentis Ltd	07054432212
tylerw	Tyler	Williams	Claromentis Ltd	07867899443
lydiad	Lydia	DeWalt	Claromentis Ltd	07643382211
philiph	Philip	Huxley	Claromentis Ltd	07094632769

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

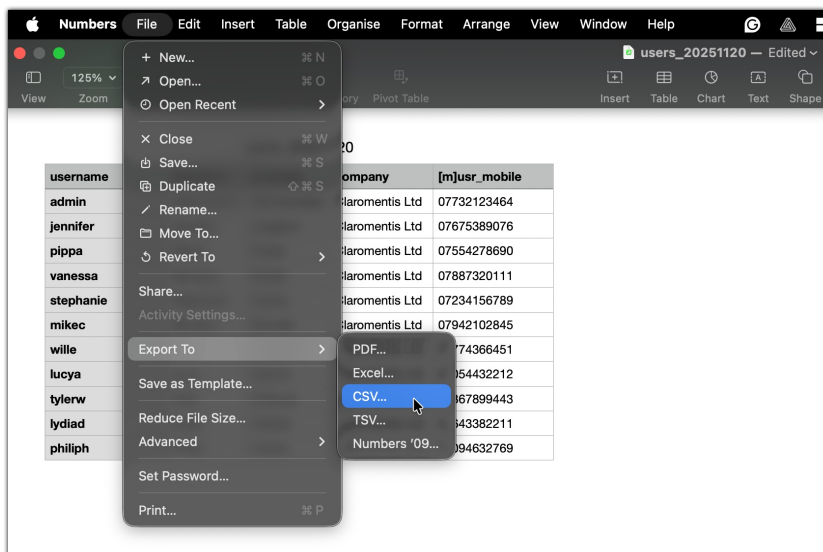
The column titles are the symbolic names of each field in Claromentis and should not be changed, as this is how they are recognised by the system at important times and ensure the corresponding field is updated.

- **Save the file as a CSV**

Once you have entered all the information for each user you want to update and checked that this is in the correct format for the field types included, the file can be exported as a CSV, ready to import to the Intranet.

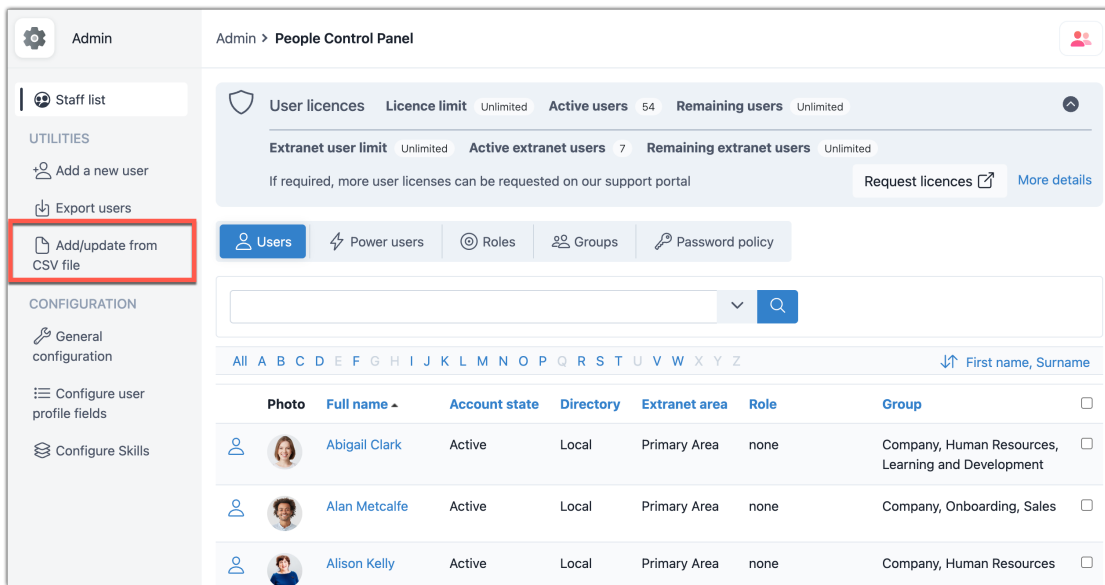
Depending on the provider you used to edit the CSV, the option to save the file as a CSV may be deeper in its settings or require clicking 'Save As' first to see CSV as an option.

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



Step 3: Import the CSV

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



A video showing all the steps to run the import:



- Upload the CSV for import (do not choose any of the options as these are not required for a bulk import of user information)

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.

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

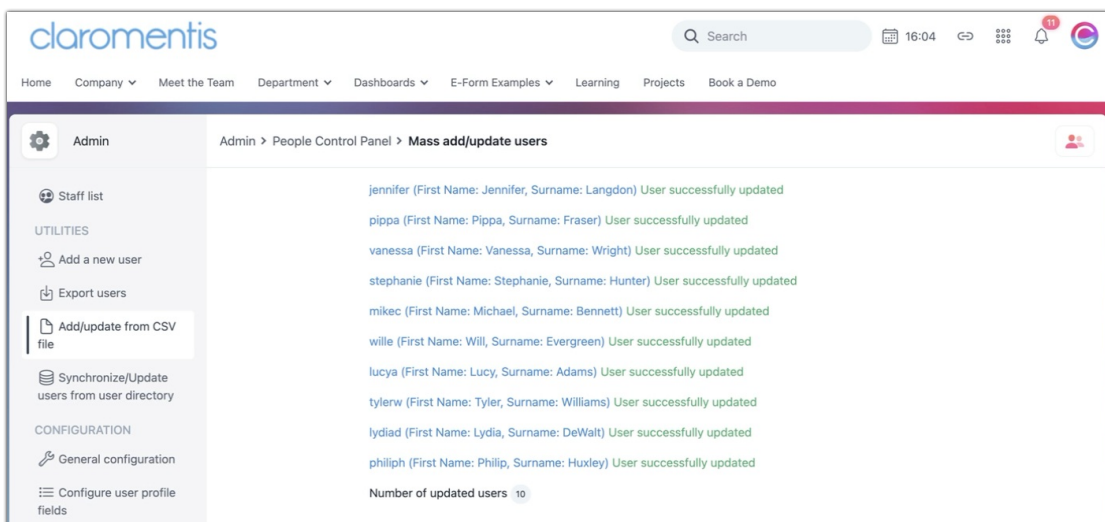
The Update column indicates the user found in the system and in the uploaded CSV. If the option is not available, please ensure the user exists in both the system and CSV (Username or User ID should match in both areas).

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.

- **Select the Confirm Submit button (found at 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.



- **Check user profiles in Admin > People to confirm the updates from the CSV were applied.**

Step 4: Repeat as necessary

Bulk imports can be prepared for and applied in the same way for other fields or users over time by People administrators.

Bulk imports are useful in situations where a lot of data needs to be updated at once or for a lot of users, and it is preferred that an administrator does this rather than relying on the user to update the field themselves.

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Tags: [intranet](#), [people](#), [user guide](#), [export](#), [CSV](#), [import](#)