

## 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

The screenshot shows the 'Admin > People Control Panel' interface. In the left-hand sidebar, under the 'UTILITIES' section, the 'Export users' option is highlighted with a red box. The main content area shows user license information and a table of users.

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':

The screenshot shows the 'Admin > People Control Panel > Users Export' configuration screen. It includes filters for keywords, role, group, and extranet area. Below these are checkboxes for selecting fields to export.

Fields	Selected
<input type="checkbox"/> ID	
<input checked="" type="checkbox"/> First name	
<input type="checkbox"/> Job Title	
<input type="checkbox"/> Extranet area	
<input type="checkbox"/> Easy find result set size	
<input type="checkbox"/> Last time login	
<input type="checkbox"/> Role	
<input type="checkbox"/> Landline	
<input checked="" type="checkbox"/> Account state	
<input checked="" type="checkbox"/> Surname	
<input type="checkbox"/> Email	
<input type="checkbox"/> Visual Interface	
<input type="checkbox"/> Password policy	
<input type="checkbox"/> LDAP GUID	
<input type="checkbox"/> Group	
<input checked="" type="checkbox"/> Mobile	
<input checked="" type="checkbox"/> Username	
<input type="checkbox"/> User code	
<input type="checkbox"/> Notify on document checkin	
<input type="checkbox"/> Language	
<input type="checkbox"/> Change password next time	
<input type="checkbox"/> External directory ID	
<input type="checkbox"/> City	
<input type="checkbox"/> Preferred contact method	
<input type="checkbox"/> Password hash	
<input checked="" type="checkbox"/> Company	
<input type="checkbox"/> Notification method	
<input type="checkbox"/> What's new	
<input type="checkbox"/> Use default password policy	
<input type="checkbox"/> External directory user ID	
<input type="checkbox"/> Address	
<input type="checkbox"/> 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

Admin > People Control Panel > Users Export

Keywords:  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

Admin > People Control Panel > Users Export

Keywords:  All words

Role: All Extranet area: All

Group: All

With subgroups

Results per page: 10

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	
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.

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	Philip	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
pipppa	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.

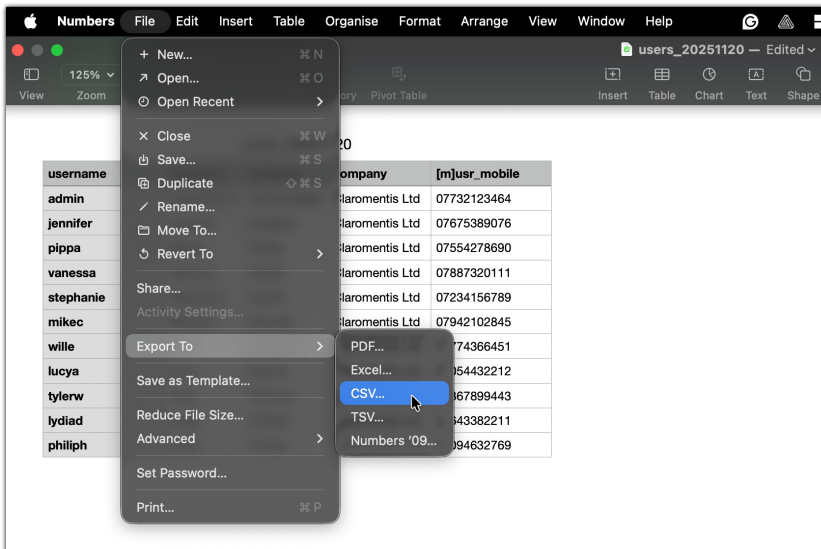
The column titles are the symbolic names of each field in Claromentis and should not be changed, as this is how they are recognised by the system at important times and ensure the corresponding field is updated.

- **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.

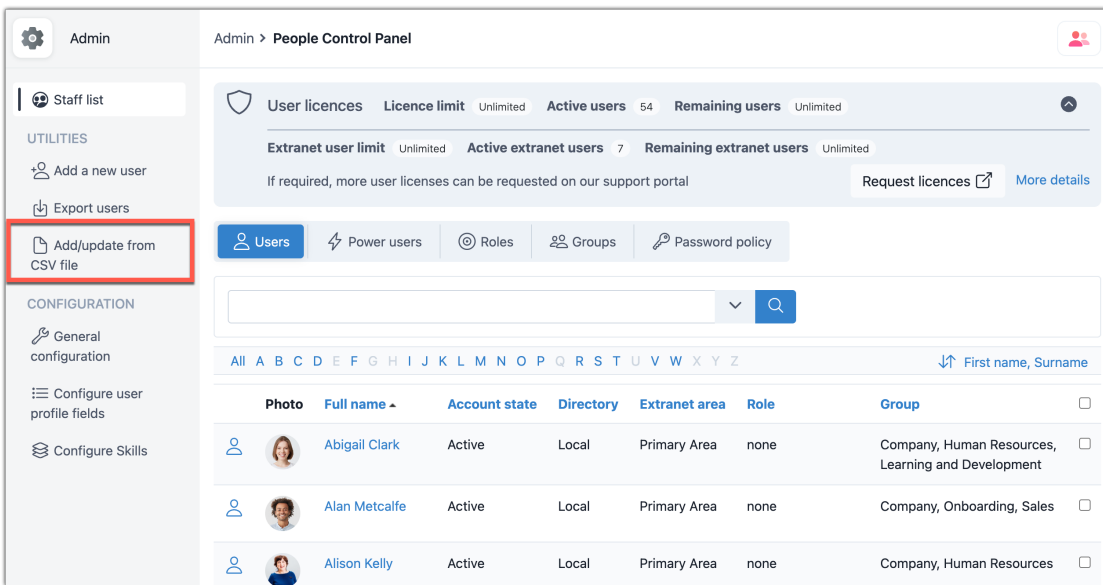
Depending on the provider you used to edit the CSV, the option to save the file as a CSV may be deeper in its settings or require clicking 'Save As' first to see CSV as an option.

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:

[Please download the file video/mp4](#)

- 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.**

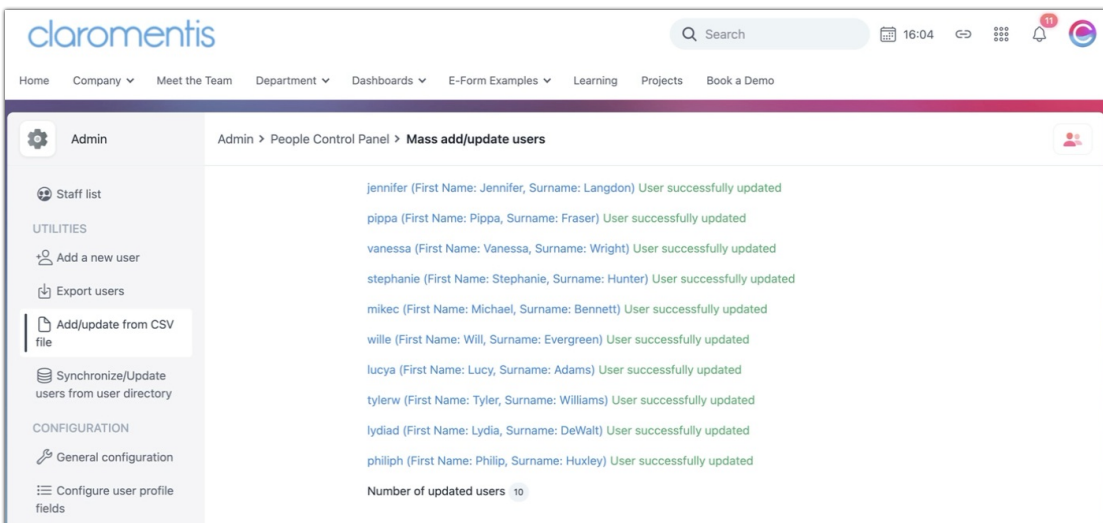
The Update column indicates the user found in the system and in the uploaded CSV. If the option is not available, please ensure the user exists in both the system and CSV (Username or User ID should match in both areas).

**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](#)