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.

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.

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**.

☐ **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	pippa	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 typehere.

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**:

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

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).

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
☑	☐	☐	☐						
☑	☐	☐	☐	Update	jennifer	Jennifer	Langdon	10	+44 (0)1273 666355
☑	☐	☐	☐	Update	pippa	Pippa	Fraser	11	+44 (0)1273 666355
☑	☐	☐	☐	Update	vanessa	Vanessa	Wright	12	+44 (0)1273 666355
☑	☐	☐	☐	Update	stephanie	Stephanie	Hunter	13	+44 (0)1273 666355
☑	☐	☐	☐	Update	victor	Victor	McLean	14	+44 (0)1273 666355
☑	☐	☐	☐	Update	jason	Jason	Reid	15	+44 (0)1273 666355
☑	☐	☐	☐	Update	jacob	Jacob	Black	16	+44 (0)1273 666355
☑	☐	☐	☐	Update	claire	Claire	Bond	17	+44 (0)1273 666355
☑	☐	☐	☐	Update	connor	Connor	Chapman	18	+44 (0)1273 666355
☑	☐	☐	☐	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 <u>not</u> 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.

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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