

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.

Step 1: Export user information

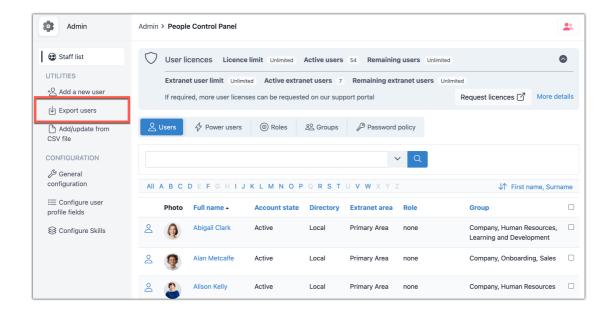
The first stage is to export the current user information the system has for the fields you are interested in to a CSV (even if blank)

So, you will need to ensure the field you want to update information for hasalready 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.

• Head to Admin > People > Export Users



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

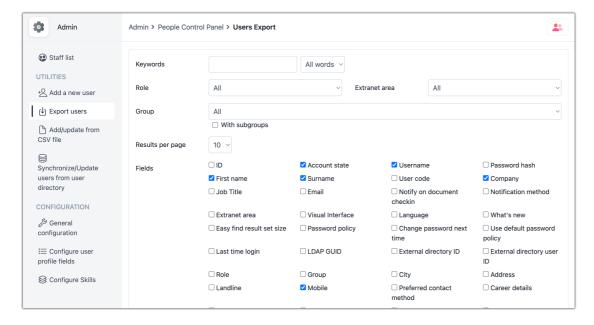
By default, 'Username', 'First name' and 'Surname' will be selected.

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.

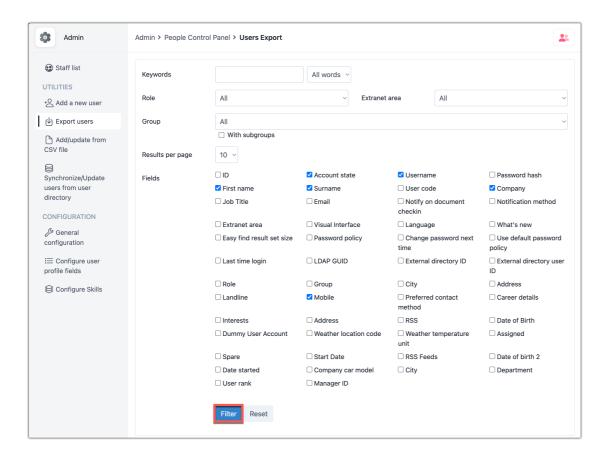
To more easily remove these from the CSV, we recommend also including the 'account state' field so that you can remove blocked accounts before importing the file, if you do not wish to update their information.

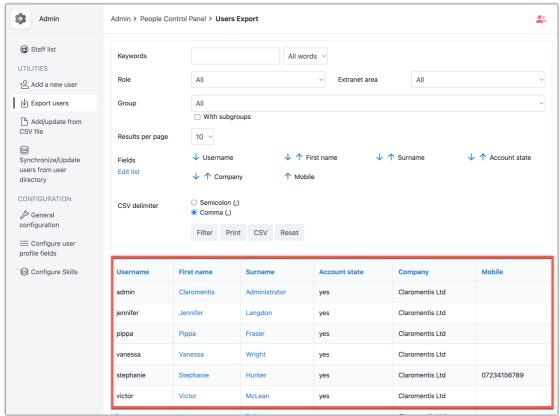
e.g. I am going to be updating the Mobile and ext fields for all users. I have chosen these for the export but have also left the default field selections included, as well as 'account state':



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

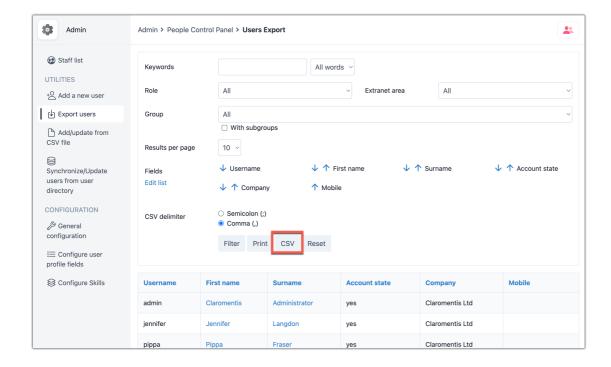
☐ Tip: You can change the order the fields appear in the CSV by using the blue arrows that now appear next to each





• Download the selected data by clicking 'CSV'

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



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	
pippa	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 arehere.

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
pippa	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.

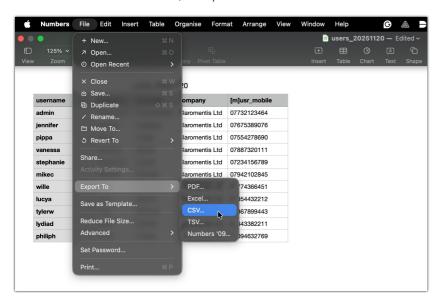
The column titles are the symbolic names of each field in Claromentis and should not be changed, as this is how they are recognised by the system at important times and ensure the corresponding field is updated.

. 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.

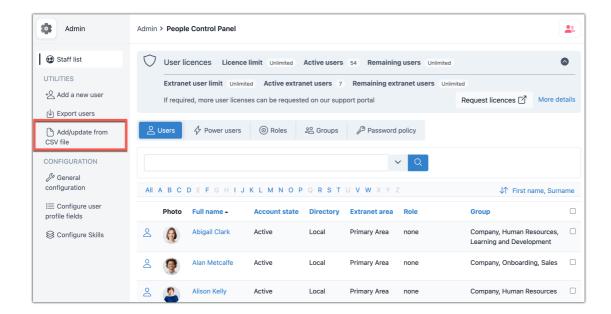
Depending on the provider you used to edit the CSV, the option to save the file as a CSV may be deeper in its settings or require clicking 'Save As' first to see CSV as an option.

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:



• 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 <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.

• 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.

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



• Check user profiles 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 was preferred that an administrator does this rather than relying on the user to update the field themselves.

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