



Bulk User Import and Generate Random Password via Email

This feature is available from **Claromentis 8.13.17+**. If you are on an older version please request an upgrade [here](#).

Overview

In this guide, we will outline the process of

- Importing a CSV file to perform a bulk import of new users.
- Generate random passwords for them.
- Send email invitations via email.
- Optional: Force user to set new password on login
- Customise invitation email template.

Prerequisite

You may have to decide and customise what user fields you wish to store in Claromentis and perform an export so that you have a CSV template to work with by following this guide: [CSV: Updating user profile fields](#)

Importing CSV File

1. At a minimum, your CSV files must have the following headings: **username**, **firstname**, **surname**, and **email** and to generate a random password it **mustn't contain a password column**.

	A	B	C	D
1	username	firstname	surname	email
2	adam.smith	Adam	Smith	adam.smith@email.com
3	bob.charlie	Bob	Charlie	bob.charlie@email.com
4	carly.brown	Carly	Brown	carly.brown@email.com

Tips: We recommend uploading max around 200 users per CSV to avoid overloading your email server.

2. Navigate to **Admin > People**, and select **Add/Update from CSV file**

3. Select the CSV file from your computer and check **"Generate random passwords and send login credentials via email"**

Choose CSV file with users data import.csv

☐ 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.**

☒ Generate random passwords and send login credentials via email
Random passwords will be generated for newly created users that don't have a password specified in the CSV file. Credential emails will be sent to newly created users, and to existing users whose passwords are changed by the import.

4. Select the action you wish, in this case, check the heading to "Add" all 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.**

Add	Update	Sync Groups	Sync Roles	Subscribe to all news channels					
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Status	Username	Firstname	Surname	Email
<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	New	adam.smith	Adam	Smith	adam.smith@email.com
<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	New	bob.charlie	Bob	Charlie	bob.charlie@email.com
<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	New	carly.brown	Carly	Brown	carly.brown@email.com

5. After clicking "Submit" you will receive confirmation that all these users have been added and an email invitation was sent.

adam.smith (First Name: Adam, Surname: Smith) New user added successfully

bob.charlie (First Name: Bob, Surname: Charlie) New user added successfully

carly.brown (First Name: Carly, Surname: Brown) New user added successfully

Number of new users **3**

From " " < >
Subject New account
To "Adam Smith" <adam.smith@ >

HTML Plain text Source

New Account

Congratulations, your new " " account has been created.

Here are your log-in details:

Username : adam.smith

Password : " "

[Log-in to " "](#)

Optional: Force users to set a new password on login

Following the steps above are sufficient to ensure each new user added by the CSV is emailed a random password to log in with.

However, you may additionally wish to prompt the user to set their own password to use going forward after the initial login.

This means the random password would no longer be active and instead the user creates one, in line with the password policy rules administrators have set.

To ensure this, additionally include the 'Change password next time' column in the CSV used to import the new users and set it to '1':

Admin / People Control Panel / Users Export

Keywords: [] All words [v]

Role: [All] Extranet area: [All]

Group: [All] [] With subgroups

Results per page: [10]

Fields:

- ☒ ID
- ☒ First name
- ☐ Job Title
- ☐ Extranet area
- ☐ Easy find result set size
- ☐ Last time login
- ☐ Landline
- ☐ Interests
- ☐ Dummy User Account
- ☐ Spare
- ☐ Date started 2
- ☐ Account state
- ☒ Surname
- ☒ Email
- ☐ Visual Interface
- ☐ Password policy
- ☐ LDAP GUID
- ☐ Group
- ☐ Mobile
- ☐ Address
- ☐ Weather location code
- ☐ Start Date
- ☐ Company car model
- ☒ Username
- ☐ User code
- ☐ Notify on document checkin
- ☒ Change password next time
- ☐ Directory
- ☐ City
- ☐ Preferred contact method
- ☐ RSS
- ☐ Weather temperature unit
- ☐ RSS Feeds
- ☐ User rank
- ☐ Password hash
- ☐ Company
- ☐ Notification method
- ☐ What's new
- ☐ Use default password policy
- ☐ External id
- ☐ Address
- ☐ Career details
- ☐ Date of Birth
- ☐ Assigned
- ☐ Date of birth 2
- ☐ Manager ID

Filter Reset

1 = yes and means the system will turn on the People option shown below for those users:

username	firstname	surname	email	change password next time
User1	Alice	Johnson	hannah.door@claromentis.com	1
User2	Peter	Stuart	test2@test.com	1
User3	Kevin	Miles	test3@test.com	1
User4	Susan	Carey	test4@test.com	1
User5	Marina	Smith	test5@test.com	1
User6	Jessica	Fredericks	test6@test.com	1
User7	Scott	Harpenden	test7@test.com	1

So once the CSV import is finished, users will be emailed a random password which they can log in with, and after successful first login, the system will additionally prompt the user to create their own to use going forward as shown

below.

Your browser doesn't support video.
Please download the file: video/mp4

Customise email invitation template

Intranet email templates can be customised from **Admin > System > Localisation > Edit Notification Template**

Under **System** select your appropriate default language ie: English

The email template is called: **panels.peopleadmin_edituser.new_user_email_notification**

Edit Notification

Editing the notification template "panels.peopleadmin_edituser.new_user_email_notification"

Language

English

Template subject

1 [{{ systemName|raw }}] New account

Template Body

1 New Account

2 Congratulations, your new {{ systemName|raw }} account has been created.
3

4 Here are your log-in details:

5

6 Username : {{ username|raw }}

7 Password : {% if isLdapAccount %}Your password is managed by LDAP.{% else %}
8

9 Log-in to {{ systemName|raw }}

10

Template preview

! New account

29-05-2020 14:00

Reply • Forward • Delete

People

New Account

Congratulations, your new account has been created.

Here are your log-in details:

Username : jsmith

Password : Password123

Log-in to

Save

Remove customisation

System notification templates use twig formatting, so any drastic changes made must adhere to these rules.

Slight modifications to the wording of the template likely won't need any twig logic applied, however, for changes beyond this more information on how to follow the formatting is here.

Click **"Save"** to apply any changes.