

# 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	В	С	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"

#### 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					
×					Status	Username	Firstname	Surname	Email
					New	adam.smith	Adam	Smith	adam.smith@email.com
				M	New	bob.charlie	Bob	Charlie	bob.charlie@email.com
				M	New	carly.brown	Carly	Brown	carly.brown@email.com

Confirm submit

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

Log-in to l

## 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':

Keywords			All words v	
Role	All ~		Extranet area All	~
Group	All ~	With subgroups		
Results per page	10 ~			
Fields		Account state	Username	Password hash
1	First name	🗹 Surname	<ul> <li>User code</li> </ul>	Company
(	🗌 Job Title	🗹 Email	Notify on document checkin	Notification method
(	Extranet area	Visual Interface	- Lunguage	What's new
(	Easy find result set size	Password policy	Change password next time	<ul> <li>Use default password policy</li> </ul>
(	Last time login	LDAP GUID	Directory	<ul> <li>External id</li> </ul>
(	Role	Group	City	□ Address
(	Landline	Mobile	Preferred contact method	Career details
(	Interests	Address	RSS	<ul> <li>Date of Birth</li> </ul>
(	Dummy User Account	<ul> <li>Weather location code</li> </ul>	Weather temperature unit	Assigned
(	Spare	Start Date	RSS Feeds	Date of birth 2
	Date started 2	Company car model	□ User rank	Manager ID

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.

# 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	Template preview
1 [{{ systemName!raw }}] New account	
Template Body	29-05-2020 14:00
<pre>1 sstrong&gt;New Accountor /&gt; 2 Congratulations, your new {{ systemNameIraw }} account has been crea     dbr /&gt; 4 Here are your log-in details:dbr /&gt; 5 dbr /&gt; 6 Username : {{ usernameIraw }} dbr /&gt; 7 Password : {% if isLdapAccount %}Your password is managed by LDAP.{} 8 dbr /&gt; 9 <a href="{{ urliraw }}">Log-in to {{ systemNameIraw }}</a>dor /&gt;</pre>	Reply • Forward • Delete     People       New Account     Congratulations, your new account has been created.       Here are your log-in details:
10	
	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.

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