Lowry

Smart Portal

Bulk Users – Import Instructions & Validations

Index

Introduction:

Rather than add users manually one at a time, you can add many users in a bulk import. To do this, you create a CSV (comma separated values) or .XLSX file that contains the user's data. Aside from the essential user data, such as email address and phone number, you can set user roles and add users to an organization (using CUST-CODE).

You must be an administrator to use the bulk import option.

Limitations & Validations:

You can import a core set of data about users. For example, using bulk import, you can import the user data described in the table below, but

1. No Validations will be done against duplicates inside the .CSV or .XLSX files, Please make sure there are no duplicates (email id's) inside the file.

> Scenario 1: If there are duplicates inside the .CSV or .XLSX file
>
> > Suppose we have the same email id for two different records at different rows say,
> > Record 121 - Brooks.Clayre@lowry.com
> > Record 240 - Brooks.Clayre@lowry.com
> > Since the record 121 is already registered inside the database the bulk import process throws an error when it reaches record 240 and exits the import process. In that case, we need to remove all the records up to the record 240 since they are already inserted in to the database and make a fresh import in to the database using the below mentioned process.
>
> Scenario 2: If there are duplicate records which match the registered data in database
>
> > Suppose we have the same email id for a record matching with registered data inside the database, in that case an error will be thrown with the email id that conflicts with the registered data and no records will be inserted, you can correct the record and import the same .CSV or .XLSX file in to the database using the below mentioned process.

2. If there are any empty cells inside the .CSV or .XLSX file (except for last name) the import process will exit without inserting any records and throws an error with the Email ID of the record at which the cell value is empty, admin can correct and import the same.

3. You cannot import the user's time zone, or photo, or language preference (as of now).

4. "No records found" error message will be shown for uploading an Empty or Blank .xlsx or .csv file.

Creating the .CSV or .XLSX user data file:

The first row of the file is the header row and contains the fields listed in the table below. You must include the header row, using all the fields and in the order they are listed below, even if you're not importing that data. In other words, you can have empty columns of data, but you must include all the header row fields.

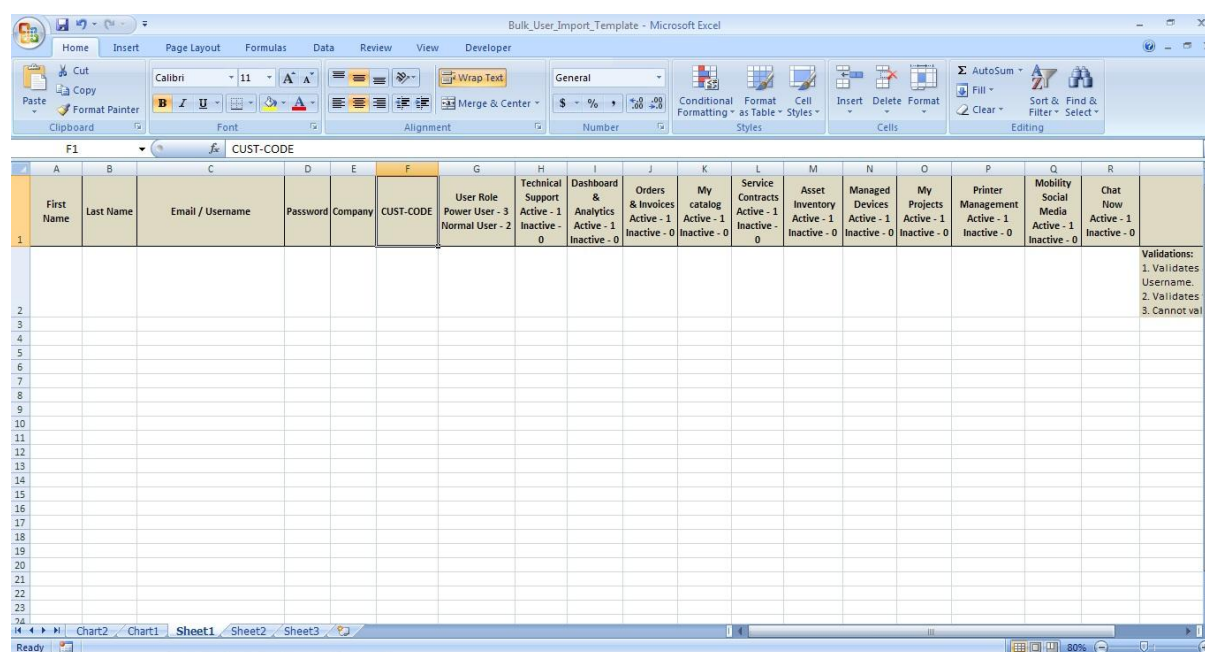The file must be properly formatted .CSV or .XLSX file.

Figure 1 Bulk User Import table

User Data Table:

Field	Description
First Name *	First name of the user
Last Name	Last name of the user
Email / Username*	Valid Email id of the user
Password *	Sample Password (user can reset their once they are logged in)
Company *	Company or Organization to which the user belongs.
CUST-CODE *	Valid customer code provided to the Organization to which the user belongs.
Role *	Role of the user – Power user/Normal user. Power user permission level id – 3 Normal user permission level id – 2. The values 3 or 2 should be provided in the Role column according to user role.
Module Management – Technical Support *	Provide 1 – to allow access to the module Provide 0 – to deny access to the module
Module	Provide 1 – to allow access to the module

Management – Dashboard & Analytics *	Provide 0 – to deny access to the module
Module Management – Orders & Invoices *	Provide 1 – to allow access to the module Provide 0 – to deny access to the module
Module Management – My Catalog *	Provide 1 – to allow access to the module Provide 0 – to deny access to the module
Module Management – Service Contracts *	Provide 1 – to allow access to the module Provide 0 – to deny access to the module
Module Management – Asset Inventory *	Provide 1 – to allow access to the module Provide 0 – to deny access to the module
Module Management – Managed Devices *	Provide 1 – to allow access to the module Provide 0 – to deny access to the module
Module Management – My Projects *	Provide 1 – to allow access to the module Provide 0 – to deny access to the module
Module Management – Printer Management *	Provide 1 – to allow access to the module Provide 0 – to deny access to the module
Module Management – Mobility Social Media *	Provide 1 – to allow access to the module Provide 0 – to deny access to the module
Module Management – Chat Now *	Provide 1 – to allow access to the module Provide 0 – to deny access to the module

*Required fields (Except for Last Name, all fields are required while bulk importing users)

Note: Whenever a user is successfully registered (using create user or bulk import), an email is sent to the registered email id of the user along with First Name, Last Name, Email & customer code.

Importing the .CSV or .XLSX user data file:

Login with your admin credentials and navigate to "User Management" which has "Import Users" function to bulk import user data.
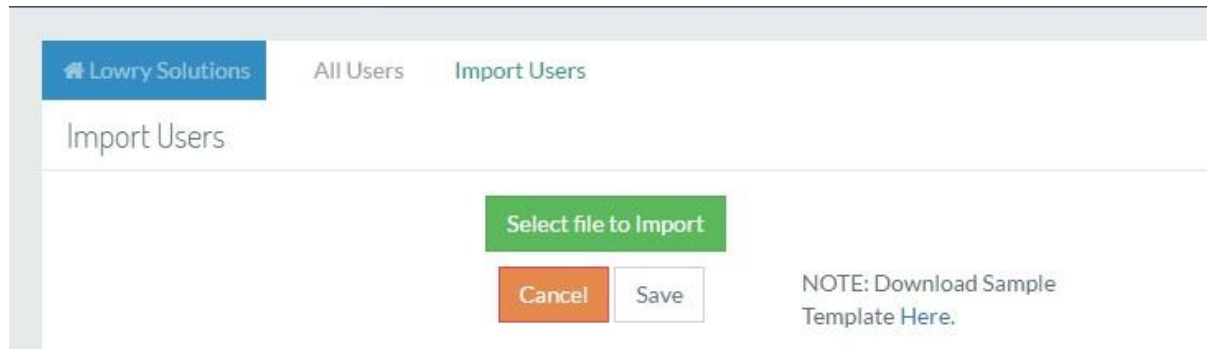
The "Import Users" data screen contains,

Figure 2 Bulk User Import screen

Note: Sample .XLSX template is provided for Administrators to download.

You can download the template and use it to Import users data in to the database.

	First Name	Last Name	Email / Username	Password	Company	CUST-CODE	User Role Power User - 3 Normal User - 2
2	Anapol	Brian	Anapol.Brian@lowry.com	*****	Lowry	10821-015	3
3	Brooks	Clayre	Brooks.Clayre@lowry.com	*****	Lowry	10845-011	2
4	Pender	Jerry	Pender.Jerry@lowry.com	*****	Lowry	10745-003	2
5	Lucas	Floyd	Lucas.Floyd@lowry.com	*****	Lowry	10745-019	3
6	Tucker	Jerome	Tucker.Jerome@lowry.com	*****	Lowry	10745-001	2
7	Lehmann	Henry	Lehmann.Henry@lowry.com	*****	Lowry	10456-120	2

Module Management Technical Support	Module Management Dashboard & Analytics	Module Management Orders & Invoices	Module Management My catalog	Module Management Service Contracts	Module Management Asset Inventory	Module Management Managed Devices	Module Management My Projects	Module Management Printer Management	Module Management Mobility Social Media	Module Management Chat Now
1	1	1	1	1	1	1	1	1	1	1
1	1	1	1	1	1	1	1	1	1	1
1	0	1	1	1	0	0	1	0	1	1
1	0	1	1	0	0	1	0	1	1	1
1	1	1	1	0	1	0	0	1	1	1
1	0	1	1	0	0	1	1	1	1	1
1	1	1	1	0	0	0	1	0	1	0
1	0	1	1	1	0	0	1	1	1	1

Figure 3 Sample User Data

Note: Make sure you thoroughly check all the limitations provided above before importing any user data in to the database.

You can check out the brief video instructions provided in the "Import Users" page on how to bulk import users in to the database.