

MySmart Portal - Bulk User Import

Bulk importing users:

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 bulk import.

This document contains the following sections:

- Limitations of bulk importing users.
- Creating the .CSV or .XLSX user data file.
- Importing the .CSV or .XLSX user data file.

Limitations of bulk importing users:

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).

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.

	A	B	C	D	E	F	G	H
1	FirstName	LastName	Email	Phone Number	UserName	Password	CUST-CODE	Role
2								
3								
4								
5								
6								
7								
8								
9								
10								

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	Valid Email id of the user
Phone Number	Valid Phone Number of the user
User Name	User Name of the user
Password	Sample Password (user can reset their once they are logged in)
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.

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 username & password.

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.

	A	B	C	D	E	F	G	H
1	First Name	Last Name	Email	Phone Number	User Name	Password (Auto generated)	CUST-CODE	Role
2	NICOLE	CRADDOCK	Anapol.Brian@lowry.com	734-595-5899	NICOLE	12345	10053-000	3
3	CARLA	BRONNER	carla.bronner@joann.com	559-713-3404	CARLA	56789	10265-200	2
4	CONNIE	LACCA	bldinvoices@bldcorp.com	248-442-4533	CONNIE	12345	10374-217	2
5	CHAD	HINRICH	CJHinrichs@landolakes.com	402-643-9109	CHAD	56789	10450-000	3
6	ROBERT	TRUMBULL	rt.L.Trumbull@owenscorning.com	231-775-3413	ROBERT	12345	11043-243	2
7	CHRIS	SODERGREN	CSODERGREN@rexairllc.com	231-775-3413	CHRIS	56789	11933-000	2
8								

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.