

CSV Import File Guidelines

You can automate adding users by creating a comma-separated values (CSV) file with user information and then importing the file. You can include attributes in the CSV file, such as license level and the publishing access, to apply to the users at the same time you import them.

To import users, you can use the server or site administration pages or the `tabcmd` utility. Using `tabcmd` provides an option for assigning a site role to all users in the CSV file. For information, see [Import Users](#) or [createsiteusers filename.csv](#).

You can import users at the site or server level. If you import users to the server (not to a specific site), the users aren't assigned to a site and are imported as Unlicensed.

CSV file format requirements

When you create the CSV file for importing users, make sure that the file meets the following formatting requirements:

- The file does not include column headings. [Tableau Server] assumes that every line in the file represents a user.
- The file is in UTF-8 format, and includes the byte-order mark (BOM).
- Character encodings such as BIG-5 have been converted to UTF-8. You can do this by opening the file in a text editor and using the [Save As] command.
- If a user name includes an @ character that represents anything other than a domain separator, you need to refer to the symbol using the hexadecimal format: `\0x40`

For example, `user@fremont@mycompany.com` should be `user\0x40fremont@mycompany.com`

Required columns in the CSV file

The following values are required for each user:

- User name
- Password: If Tableau Server is configured to use Active Directory authentication, there must be a `Password` column, but the column itself should be empty. If the server is using local authentication, you must provide passwords for new users.

Additional import file options

The CSV file can contain the following fields, in the order shown here:

- User name. The user name. If the server is configured to use Active Directory, this value must match a user defined in Active Directory. If the user name is not unique across domains, you must include the domain as part of the user name (for example, `example\Adam` or `adam@example`). This is the only required field.
- Password. A password for the user. If the server is configured to use Active Directory, this value is not used.
- Display name. The display name is part of the information used to identify a user on the server. If the user's display name is already in use, Tableau Server updates the existing user information with the settings in the CSV file. If the server is configured using Active Directory, this value is not used.
- License level. This can be [Creator], [Explorer], [Viewer], or [Unlicensed].

- Administrator level ([System], [Site], or [None]). This setting determines whether the user is imported as an administrator.

If you are using the web UI to import users, you can set the administrator site role to [System] only if you import the file at the server (All Sites) level. If you are signed in to a specific site, and if the administrator column for a user in the CSV file is set to [System], Tableau Server imports the user as a site administrator.

- Publishing capability (**yes/true/1** or **no/false/0**). If you are using the web UI, the publisher setting is used only if you import while signed in to a specific site. If you import users at the server (All Sites) level, this value isn't used.
- Email address. The email address is part of the information used to identify a user on the server. If the email address is already in use, Tableau Server updates the existing user information with the settings in the CSV file.

The order of the columns is significant. The first column is treated as the user name, the second as the password, the third as display name, and so on, regardless of the content in the columns. If you omit values for a field, you must still include the field's comma delimiter.

Improve performance for large CSV files passed through tabcmd

A server administrator can enable server settings that help to improve performance for importing large CSV files through tabcmd commands. You can do this using the `tsm configuration set` command with the following options:

- `vizportal.csv_user_mgmt.index_site_users`
- `vizportal.csv_user_mgmt.bulk_index_users`
- `searchserver.index.bulk_query_user_groups`

Essentially, these options index users after the CSV file is processed, instead of one-by-one as they are added to the server's database. This reduces the number of calls to the database and the memory required to process the file.

These `tsm configuration set` options apply to the `tabcmd createsiteusers`, `deletesiteusers`, `addusers`, and `removeusers` commands.

For descriptions for these settings, see [tsm configuration set Options](#).

Notes

- If you are not signed in to a specific site and are importing users at the server level, you can assign only the Server Administrator and Unlicensed site roles.
- If you have a user-based server installation, and if adding users would exceed the number of users allowed by your license, the users are added as unlicensed users.
- If you use `tabcmd` and specify the license, but importing users would exceed your license limits, users are imported as Unlicensed.

CSV settings and site roles

The license level, administrator, and publishing settings for a user determine how the user's site role is set during the import process. The following table shows how the settings are converted to site roles.

-----+-----+ CSV settings Site role
=====+=====+

License level=(any) | Server Administrator. This setting ||| applies to Tableau Server only, and it || Administrator=System\ | is valid only if you are importing users ||| while managing the server (that is, not || Publisher=true | signed in to a specific site). ||||| The Server Administrator site role ||| always takes a Creator license if one is ||| available. If no Creator license is ||| available, see [Troubleshoot ||| Licensing] ([{MCXref |||.xref}](https://help.tableau.com/curr/|||ent/server/en-us/unlicensed.htm)) to learn about the way Tableau ||| Server handles this. | +-----+ | License level=Creator or | Site Administrator Creator or Site || Explorer | Administrator Explorer. This setting is ||| valid only if you are importing users || Administrator=Site | while signed in to a specific site. ||||| Publisher=true || +-----+ +-----+ | License level=Creator\ | Creator ||||| Administrator=None\ ||||| Publisher=true || +-----+ +-----+ | License level=Explorer\ | Explorer (Can Publish) ||||| Administrator=None\ ||||| Publisher=true || +-----+ +-----+ | License level=Explorer\ | Explorer ||||| Administrator=None\ ||||| Publisher=false || +-----+ +-----+ | License level=Viewer\ | Viewer ||||| Administrator=None\ ||||| Publisher=false || +-----+ +-----+ | License level=Unlicensed\ | Unlicensed ||||| Administrator=None\ ||||| Publisher=false || +-----+ +-----+ |

CSV import example for Tableau Server

The following example shows a CSV file that contains information for several users.

```
henryw,henrypassword,Henry Wilson,Creator,None,yes,henryw@example.com
freds,fredpassword,Fred Suzuki,Viewer,None,no,freds@example.com
alanw,alanpassword,Alan Wang,Explorer,Site,yes,alanw@example.com
michellek,michellepassword,Michelle Kim,Creator,System,yes,michellek@example.com
```

If you import this file while managing a site, four users are added to that site. The `Administrator` setting for user Michelle is `System`. However, because you are importing the users into a site, Tableau Server give Michelle the Site Administrator Creator site role. Three of the users are allowed to publish.

If you import this file while managing the server, four users are added to the server, but they are not added to any site. Only one user is imported as a server administrator; the rest are set to Unlicensed.