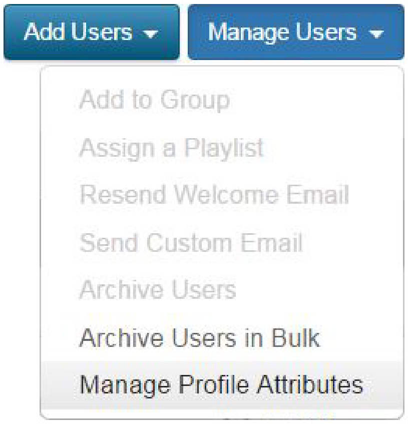
Bulk User Upload

Bulk upload can be used to add new users and update existing users.

You should not use bulk upload if you use single sign-on and user profiles are created when users first log in (just-in-time provisioning). If you do so, duplicate profiles will be created.

Adding New Users

Setup

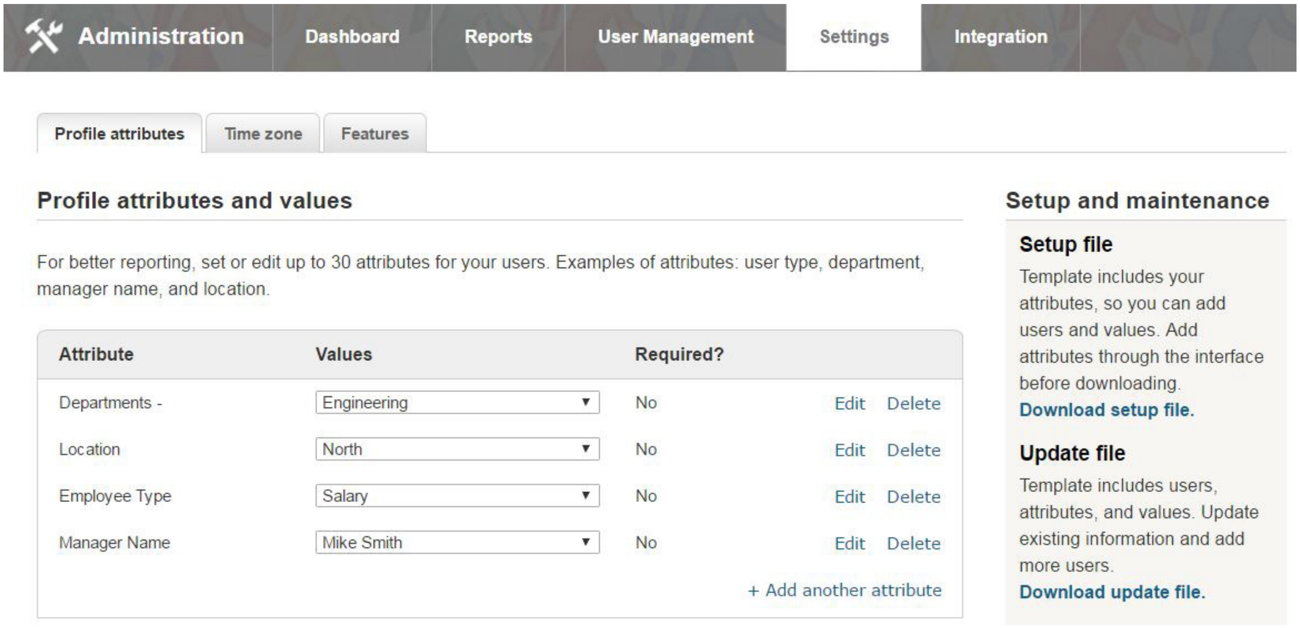


To get started, create a Microsoft Excel or CSV template. This is the file you'll use to upload user information.

At a minimum, the file must include a column for user email addresses, first names, and last names, but additional attributes are recommended for better reporting. For example, you can add categories such as business unit, function, manager, or location. This will allow you to group users and track learning activity by user group.

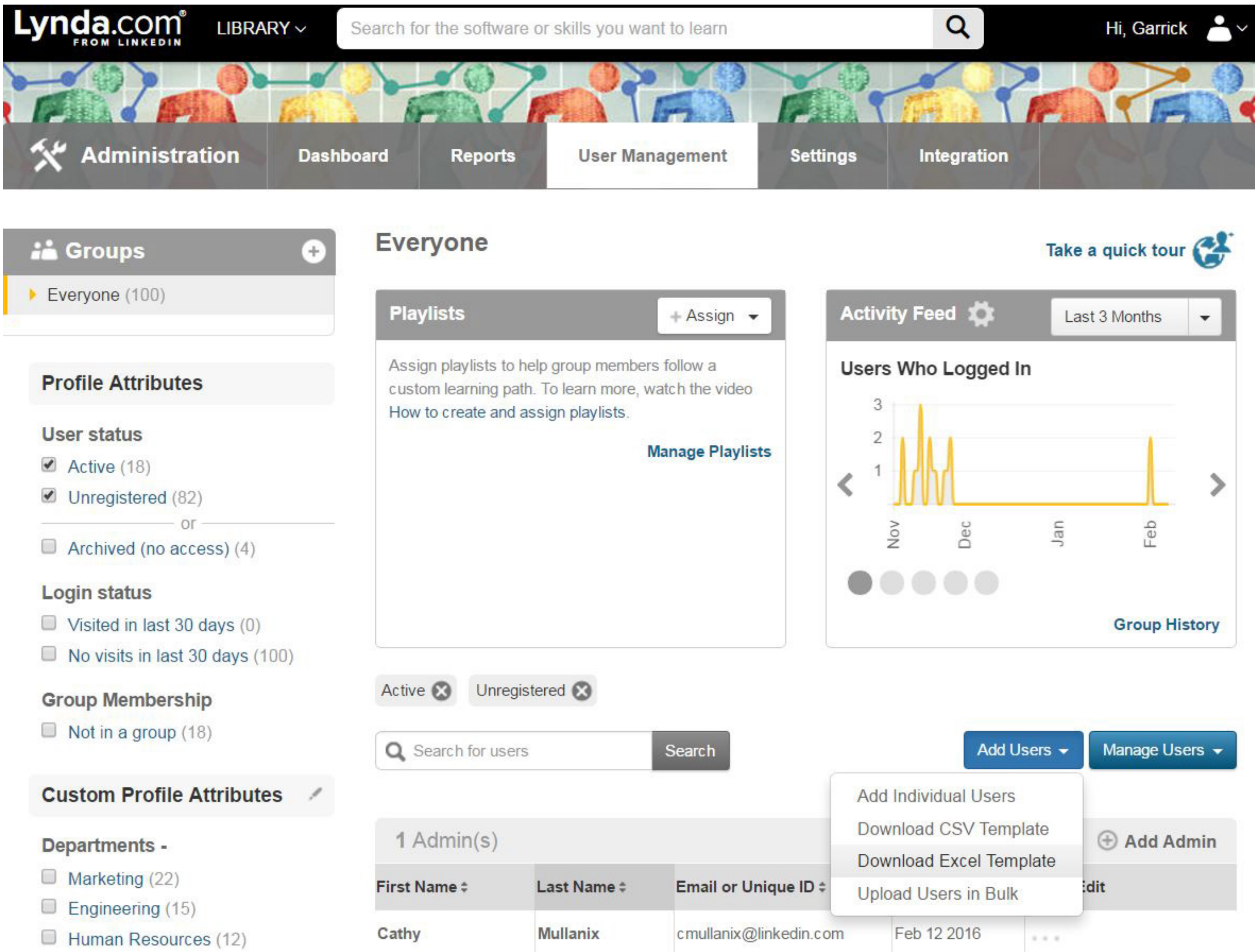
To create your customized upload file template:

- Click **Manage Users > Manage Profile Attributes** from your administrator account.
- Add attributes by clicking **Add another attribute**.
- Once you're finished, download your template by clicking **Download setup file** at the right hand panel.



Preparing your file

1. Download your Excel or CSV template by clicking **Add users** and selecting your file format from the dropdown menu, or by downloading it from the **Manage Profile Attributes** page.
2. Open the file in Excel.
3. Populate the template with your users' information.



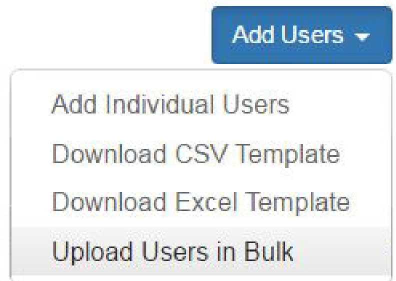
4. To customize the column fields (i.e., user attributes) that are included in the template before populating it, click **Manage Users > Manage Profile Attributes**. Review an example upload file below.

	A	B	C	D	E	F	G	H
1	Email	First name	Last name	Division	Location	Main Manager	Functional Area	Region
2	jsmith@test.com	Jennifer	Smith	Business Unit A	Chicago	Tim Nelson	Operations	North America
3	wjohnson@test.com	William	Johnson	Business Unit B	Omaha	Amanda Bates	Finance	North America

User Information

- You must provide at a minimum email addresses and names.
- Add a line for each user you'd like to add. If you're using a CSV file format, use commas to separate values.
- Other fields (division, location, manager, functional area, region, etc.) are optional but highly recommended, so that you can easily group and recommend content to your users. These fields are customizable by clicking **Manage Users > Manage Profile Attributes** and then clicking **Download setup file**. This file will become your new template.

Uploading



1. Once your upload file is ready, select **Add Users > Upload Users in Bulk**.
2. Choose your file and click **open**.

What Happens Next

- We'll upload the file and notify you of any errors.
- Your newly added users will appear in the **Users** list on the **User Management** tab of your administrator account.
- We'll send an email to your added users with instructions on how to activate their accounts.

Updating Existing Users

Use an Excel file to update or modify existing user information in bulk.

- Click **Manage Users > Manage Profile Attributes > Download update file**.
- Make changes to users in the downloaded Excel document, and save a new version of the document to your local hard drive.
- Upload the revised Excel file by clicking **Manage Users > Manage Profile Attributes > Upload/ update account**.
- The changes you made in the Excel document will be reflected in users' profiles.