



## How to Add and Edit Multiple Users

You can add, edit or delete multiple Administrators, Managers and Users at the same time using the **CSV** (Comma Separated Values) **Import** feature. This is located at the bottom of the group settings page.

### Export Group Users

The first step is to export the existing users to a CSV (there needs to be at least an Administrator on the account to use CSV feature). This will download a file called **group.csv**. The file will contain all of the current group user data such as username, display name and email. It also contains permissions for the users, for example can they publish documents or change their email address.

#### Import/Export CSV

You can make bulk changes to users by exporting them to a CSV file, editing it with an external tool, and then importing it. Users can be edited, added or deleted. Any existing user not present in the uploaded file will be left unaltered.

Export group users to CSV

Import group users from CSV

### The CSV File

The file will open in Excel.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	username	display_name	email	role	publish	own_docs	change_email	user_limit	locked	manager	password	delete	1
2	graham	Graham	graham@	admin	TRUE	TRUE	TRUE	0					
3	gee	Gee	guillaume	manager	TRUE	TRUE	FALSE	0	FALSE				
4	doug	Doug	doug@wii	manager	FALSE	TRUE	TRUE	0	TRUE				
5	naomi	Naomi		manager	TRUE	TRUE	TRUE	5	FALSE				
6													
7	#	Exported at 2022-02-22 13:45:22 +0000											
8	#	Any users not present in this file will NOT be changed when it is imported.											
9	#	Make sure any managers or admins already exist BEFORE trying to assign them as a manager in this file.											
10	#	You cannot create a new manager and assign them to a user in one go via CSV.											
11	#	Blank rows, and any row with a hash (#) in the first column, are ignored.											
12	#	Usernames cannot be changed via CSV upload.											
13	#	Changes to users are done first (in the order they appear in this file), followed by user deletions, followed by new user creation.											
14	#	To add a user, simply fill in a new row for them. Admins must have an email address set.											
15	#	To change or set a user's password, put the new password in the 'password' column.											
16	#	To delete a user, enter their username in the 'delete' column.											

You can insert new rows under the last user. Each column is as follows:

### A. username

This is the name the user logs in as – it has to be lowercase, with no spaces and no punctuation.

	A	
1	username	dis
2	graham	Gr
3	gee	Ge
4	doug	Dc
5	naomi	Na

### B. display\_name

This is how the user will appear to others in the account.

	B	
	display_name	e
	Graham	g
	Gee	g
	Doug	d
	Naomi	

### C. email

The email address for the user. This can be left blank.

	C	
	email	
	graham@widgit.com	
	guillaume@widgit.com	
	doug@widgit.com	

### D. role

Whether they are an admin, manager or user.

	D	
	role	
	admin	
	manager	
	manager	
	manager	

### E. publish

This will give them permission (or not) to publish documents. To allow them to publish mark as **TRUE**, to deny them permission mark as **FALSE**, to leave unchanged, leave the cell blank.

	E	
	publish	
	TRUE	
	TRUE	
	FALSE	
	TRUE	

### F. own\_docs

Mark this column as **TRUE** to allow the user to have their own documents folder (or **FALSE** if you only want them to access a shared area.)

	F	
	own_docs	
	TRUE	
	TRUE	
	TRUE	
	TRUE	

### G. change\_email

If this column is marked **TRUE** the user has permission to change their own email.

G	
change_email	
TRUE	
FALSE	
TRUE	
TRUE	

### H. user\_limit

Managers can have an oversight of a set of users, for example a teacher and a set of pupils. This column shows the maximum number of users they can control.

H	
user_limit	lo
0	
0	
0	
5	

### I. locked

This can be used to lock users (see separate guide). You may wish to do this whilst setting up, to prevent early access, or if there is an issue with a particular user. Again, leave empty for no change, **FALSE** for unlocking and **TRUE** to lock.

I	
locked	n
0	
0	FALSE
0	TRUE
5	FALSE

### J. manager

You can allocate users to a specific manager – use the manager username.

J	
manager	p
doug	

### K. password

You can set people's passwords using this column. **These can be changed once they have logged in themselves.**

K	
password	c

### L. delete

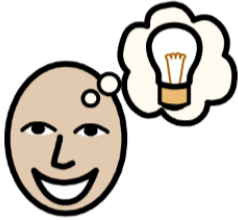
To delete a user, put their username in this column.

L	
delete	

### M. 1

For internal use only – please do not use this column.

M	
1	



To consider when editing a csv file:

- Any users not present in this file will **NOT** be changed when it is imported.
- Make sure any Managers or Admins already exist **BEFORE** trying to assign them as a Manager in this file.
- You cannot create a new Manager and assign them to a user in one go via CSV.
- Blank rows, and any row with a hash (#) in the first column, are ignored.
- Usernames cannot be changed via CSV upload.
- Changes to Users are processed first (in the order they appear in this file), followed by User deletions, then new user creation.
- To add a User, simply fill in a new row for them. Admins must have an email address set.
- To change or set a User's password, put the new password in the 'password' column.
- To delete a User, enter their username in the 'delete' column.
- If you assign a Manager to a User when both are created in the same CSV import, the Manager will not be assigned. You can run the CSV file through a second time to assign the Manager

## Import Group Users

Once you have made any required changes, and saved your file, you can import back into the online account. Simply click the button, navigate to the file and click save.

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