

Managing User Data in Bulk via CSV

BSC Health & Safety e-Learning Platform



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Introduction

By using a CSV file, you can create or edit multiple user accounts at once. This makes for an easier process than creating or editing accounts individually. For example, you could create 100 user accounts with one file upload instead of entering the account data manually.

Creating Accounts

To create accounts in bulk we need to gather the required data and add it to a spreadsheet file in the correct format. Once we have created our file we can then upload the contained data to the platform.

Step One: Creating the CSV file

We can create a CSV file from any Excel (or equivalent) spreadsheet file. Saving a spreadsheet file as CSV will remove any formatting (such as colours) and any data not contained in the first workbook (tab).

The CSV file will consist of a top-row (row 1) which contains all the column headings and as many further rows as needed to contain the data. The column headings must match the specifications detailed below as they inform the platform as to what data each column contains.

Spreadsheet Specifications:

Column Name	Description	Example Content
auth	Used to denote an active or inactive user (current or ex-employee). This must be lowercase .	active
username	A unique username for that person. Often the email address but can be any other unique value (such as an employee number or network ID). This must be lowercase .	john.smith@fakecompany.com
email	The user's email address. This must be lowercase .	john.smith@fakecompany.com

Column Name	Description	Example Content																		
firstname	The user's first name.	John																		
lastname	The user's last name.	Smith																		
country	The ISO 2-digit country code. This must be uppercase - list here: https://www.iso.org/obp/ui/#search	GB																		
custom_department	The user's Department (optional, can be left blank).	IT																		
custom_citytown	The user's location. Could be a city/town building or campus.	London																		
profile_field_manager	The email address of the user's manager. This will automatically give that manager access to this user's data on the platform. This must be in lowercase (optional, can be left blank).	susan.jones@fakecomp any.com																		
cohort1, cohort2, cohort...	<p>The name of the cohort (course) the user is to be added to.</p> <p>You can view a list of available cohorts on your platform by going to Administration > Users > Accounts > Cohort.</p> <p>The 'Cohort ID' column contains the name of the cohort to be used in the spreadsheet. See the highlighted area in the screenshot below.</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Cohort ID</th> <th>Description</th> <th>Cohort size</th> <th>Source</th> <th>Edit</th> </tr> </thead> <tbody> <tr> <td>Global</td> <td>Global</td> <td>Users added to this cohort will be given access to the following: <ul style="list-style-type: none"> • Display Screen Equipment: Learning • Display Screen Equipment: Risk Assessment • Fire Safety • Manual Handling • Data Protection Including GDPR • The Policy Hub </td> <td>7</td> <td>Created manually</td> <td>✕ ⊗ ⋮</td> </tr> <tr> <td>Remote Workers' Health, Safety and Welfare</td> <td>RemoteWorkers</td> <td>Users added to this cohort will be given access to the Remote Workers' Health, Safety and Welfare training.</td> <td>3</td> <td>Created manually</td> <td>✕ ⊗ ⋮</td> </tr> </tbody> </table> <p>Can be left blank if the user does not have to be added to more than one cohort.</p>	Name	Cohort ID	Description	Cohort size	Source	Edit	Global	Global	Users added to this cohort will be given access to the following: <ul style="list-style-type: none"> • Display Screen Equipment: Learning • Display Screen Equipment: Risk Assessment • Fire Safety • Manual Handling • Data Protection Including GDPR • The Policy Hub 	7	Created manually	✕ ⊗ ⋮	Remote Workers' Health, Safety and Welfare	RemoteWorkers	Users added to this cohort will be given access to the Remote Workers' Health, Safety and Welfare training.	3	Created manually	✕ ⊗ ⋮	RemoteWorkers
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Remote Workers' Health, Safety and Welfare	RemoteWorkers	Users added to this cohort will be given access to the Remote Workers' Health, Safety and Welfare training.	3	Created manually	✕ ⊗ ⋮															
password	The initial password for the user (to be changed on 1st login). Passwords can be generated randomly for each user if preferred. However, the 'New account' email notification will have to be enabled to ensure each user is sent their password information.	health3safety																		

	A	B	C	D	E	F	G	H	I	J	K	L
1	auth	username	email	firstname	lastname	country	custom_department	custom_citytown	profile_field_manager	cohort1	cohort2	password
2	active	john.smith@fakecompany.com	john.smith@fakecompany.com	John	Smith	GB	IT	London	susan.jones@fakecompany.com	Display	Driver	pa33word
3	active	emma.williams@fakecompany.com	emma.williams@fakecompany.com	Emma	Williams	GB	Sales	Manchester	rebecca.roberts@fakecompany.com	Display		pa33word

Figure 1 - This file would create two new user accounts

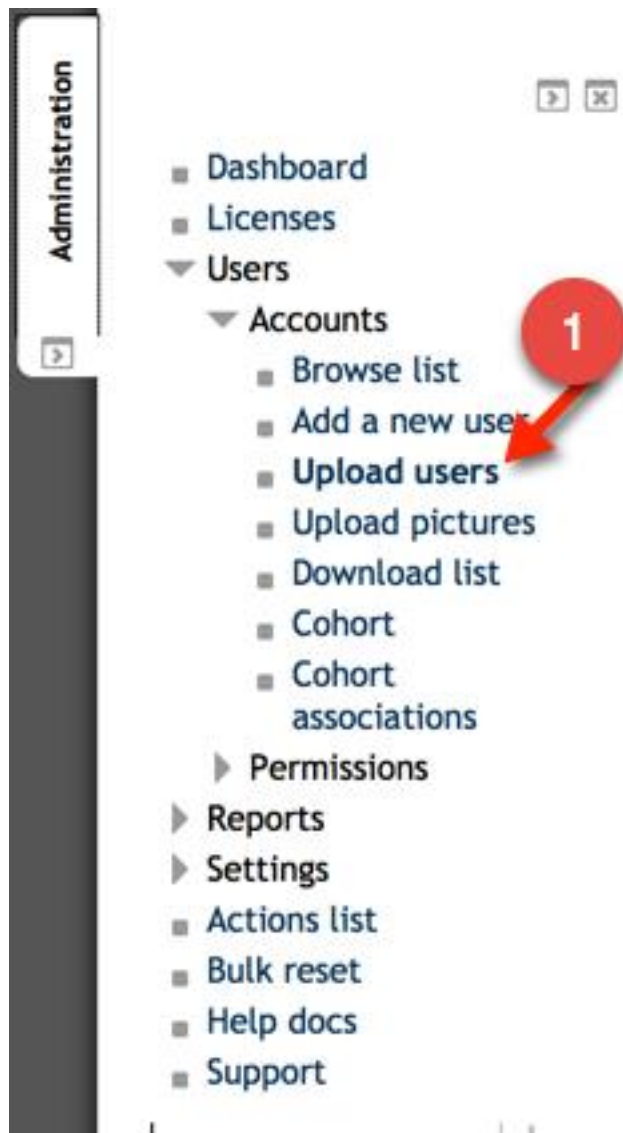
Once you have prepared your file you can use your spreadsheet application 'Save as' option to save the file in 'CSV (Comma Separated Values)' format. The exact process will differ depending on the spreadsheet application you are using.

You can download an example template from our help article here to use as a basis for your upload: <https://support.britsafe.org/hc/en-gb/articles/360006540833>

Step Two: Uploading your data

Next, we need to upload our CSV file to the platform. To do this:

1. Go to **Administration > Users > Accounts > Upload users**




2. Drag and drop your csv file into the upload area (or click on 'Choose a file' to browse)
3. Click on the **Upload users** button

Upload users ?

▼ Upload

File* Maximum size for new files: 256MB



You can drag and drop files here to add them.

CSV delimiter ⌵

Encoding ⌵

Preview rows ⌵

3 

There are required fields in this form marked *.

4. On the resulting screen in the **Settings** section set **Upload type** to 'Add new only, skip existing users'
5. Set **New user password** to 'Field required in file' (this ensures the password you provided in the csv file is assigned to all new users).
 - a. If you would like the platform to generate random passwords for each user do not change this. Be aware, for users to be advised of their credentials when using platform generated passwords, the 'New Account' email notification must be enabled. See our [Managing email notifications](#) guide for more information.
6. Set **Force password change** to 'All' (This forces all new users to choose their own password when they first log in)

The screenshot shows a 'Settings' section with the following options:

- Upload type:** Add new only, skip existing users (indicated by a red circle with '4' and an arrow pointing to the dropdown arrow).
- New user password:** Field required in file (indicated by a red circle with '5' and an arrow pointing to the dropdown arrow).
- Existing user details:** No changes
- Existing user password:** No changes
- Force password change:** All (indicated by a red circle with '6' and an arrow pointing to the dropdown arrow).
- Allow renames:** No
- Allow deletes:** No
- Allow suspending and activating of accounts:** Yes
- Prevent email address duplicates:** Yes
- Standardise usernames:** Yes
- Select for bulk user actions:** No

7. Scroll to the end of the screen and click the **Upload users** button

Your user data will now be uploaded and new user accounts will be created. The platform will list the content of each row of your spreadsheet as the accounts are created.

Updating Accounts

To edit accounts in bulk we need to download the user data, edit it in our spreadsheet application and upload the updated data to the platform.

Step One: Downloading user data

Existing user data can be downloaded in CSV format. This file can then be edited with our changes and uploaded back to the platform. To download the user data in CSV format:

1. Go to **Administration > Users > Accounts > Download list**
2. (optional) Use the filters to select a subset of user data
3. In the **'Available'** column, select users whose data you wish to download
4. Click on the **'Add to selection'** button to add your selected users to the **'Selected'** column or click the **'Add all'** button to add all users in the **'Available'** column to the **'Selected'** column
5. Click on the **'Download list'** button

A CSV file containing your user data will be downloaded to your computer.

The screenshot shows the 'Administration' interface. On the right, a navigation menu lists 'Administration', 'Dashboard', 'Licenses', 'Users', 'Accounts', 'Browse list', 'Add a new user', 'Upload users', 'Upload pictures', 'Download list', 'Cohort', 'Cohort associations', 'Permissions', 'Reports', 'Settings', 'Actions list', 'Bulk reset', 'Help docs', and 'Support'. A red arrow labeled '1' points to 'Download list'.

At the top, a 'New filter' section is shown with 'User full name' as the filter type, a dropdown set to 'contains', and an empty text input field. A red arrow labeled '2' points to the 'Add filter' button.

The main area is titled 'Users in list' and contains two columns: 'Available' and 'Selected'. The 'Available' column shows 'All users (7)' and lists Edgar Allen Poe, George Orwell, Jane Austen, Leo Tolstoy, Mary Shelley, Oscar Wilde, and Sylvia Plath. A red arrow labeled '3' points to the 'Available' column. The 'Selected' column shows 'All selected (7/7)' and lists the same seven authors. A red arrow labeled '4' points to the 'Add to selection' button below the columns.

Below the columns are buttons for 'Add to selection', 'Remove from selection', 'Add all', and 'Remove all'. A red arrow labeled '5' points to the 'Download list' button at the bottom of the page.

Step Two: Preparing the downloaded file for uploading

Your user data has been downloaded but it's not quite ready to be uploaded back to the platform. To prepare the file you need to open it in your spreadsheet application and make some changes.

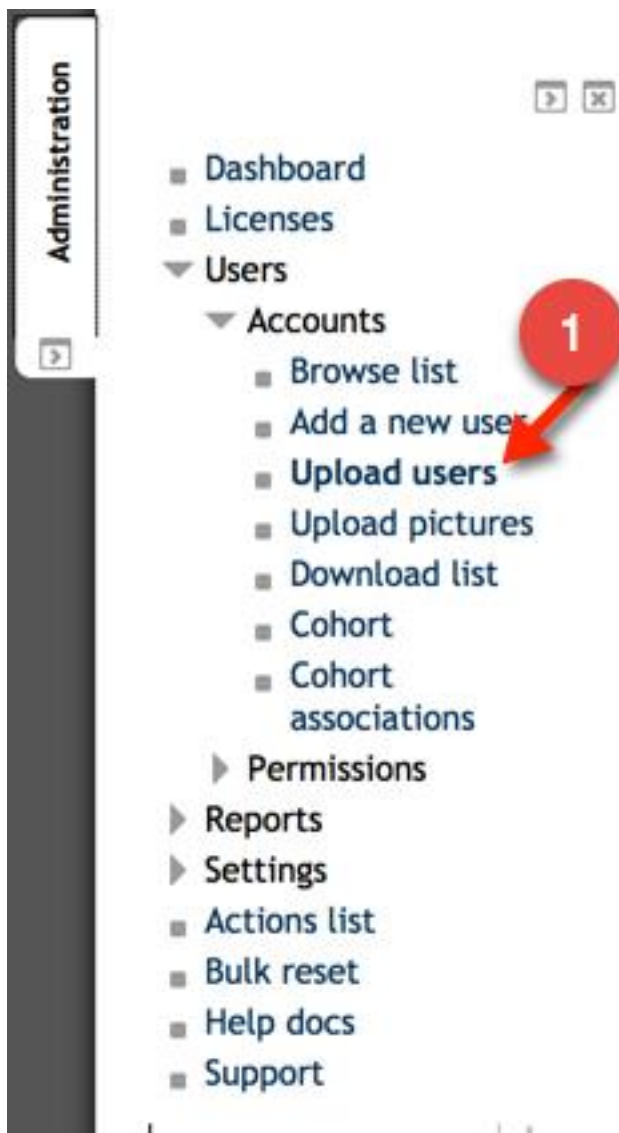
1. Delete the 'id' and 'firstaccess' columns as these cannot be used in an uploaded file
2. Add any missing columns needed such as 'cohort1' and 'password'
3. Change the user data as needed
4. Save the file (ensure you do not change the file format from CSV)

Your file should now be ready to upload

Step Three: Uploading your edited data to the platform

Next, we need to upload our CSV file to the platform. To do this:

1. Go to **Administration > Users > Accounts > Upload users**




2. Drag and drop your csv file into the upload area (or click on 'Choose a file' to browse)
3. Click on the **Upload users** button

Upload users ?

▼ Upload

File* Maximum size for new files: 256MB



You can drag and drop files here to add them.

CSV delimiter ⌵

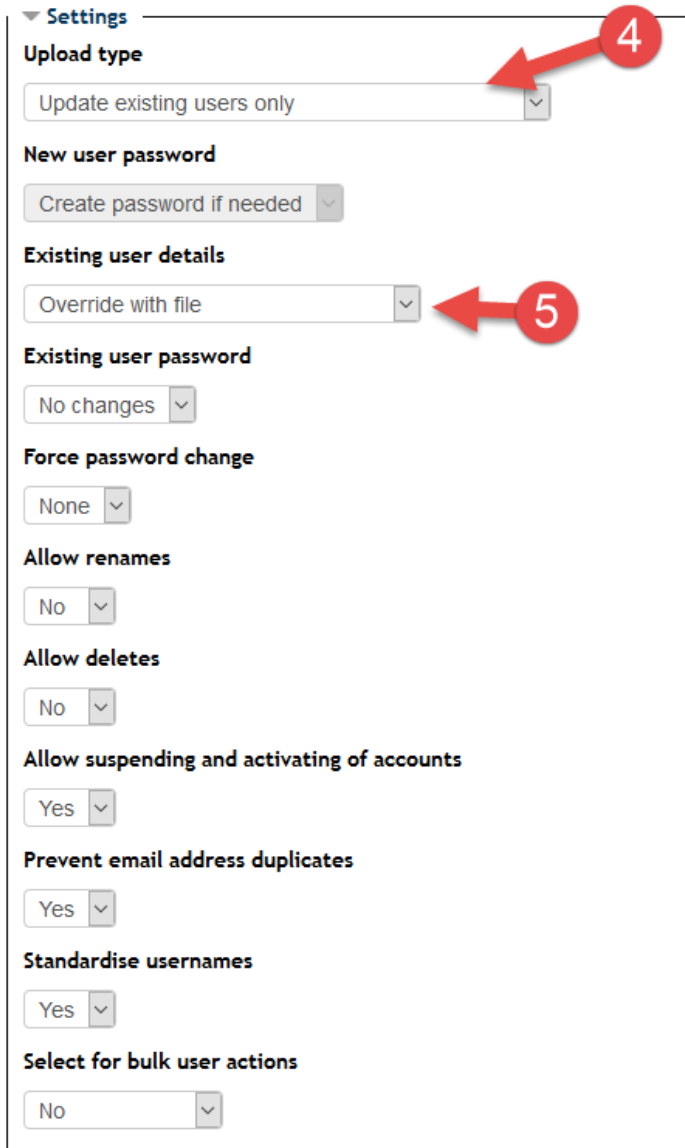
Encoding ⌵

Preview rows ⌵

3 

There are required fields in this form marked *.

4. On the resulting screen in the **Settings** section set **Upload type** to 'Update existing users only'
5. Set **Existing user details** to 'Override with file'
6. If you are updating passwords for existing users set **Existing user password** to 'Update' and set **Force password change** to 'All'



Settings

Upload type
Update existing users only

New user password
Create password if needed

Existing user details
Override with file

Existing user password
No changes

Force password change
None

Allow renames
No

Allow deletes
No

Allow suspending and activating of accounts
Yes

Prevent email address duplicates
Yes

Standardise usernames
Yes

Select for bulk user actions
No

7. Scroll to the end of the screen and click the **Upload users** button

Your user data will now be uploaded and the existing accounts updated. The platform will list the content of each row of your spreadsheet as the accounts are updated.

Troubleshooting

The platform requirements of the CSV file are quite stringent. You may encounter issues if you attempt to upload data which contains the following:

- Spaces in or at the end of usernames or email addresses
- Apostrophes in usernames or email addresses
- Uppercase letters in usernames or email addresses
- Commas in the data