

You can create many users for this customer by importing a Microsoft Excel spreadsheet. You can also import a spreadsheet to update existing user information, including changing roles and adding users to user groups.

Requirements: Confirm that you can locate the ImportUsersTemplate.xls template spreadsheet that is supplied with your system at C:\Creo\InSite\templates\.

1. Open the ImportUsersTemplate.xls template spreadsheet.

This spreadsheet contains column headings for each element in the user account. The columns for required user information are shaded in blue—for example, **Username, First and Last Name, Password, Email Address, Email Language, Admin Role, Default Job Role and Job Access.**

2. Copy and rename the spreadsheet according to your needs:
 - Create one spreadsheet for each customer account.
 - Create one spreadsheet for all staff users.

3. In the spreadsheet, for each user, enter information in the cells of columns that are shaded in blue. These columns are required fields—the cells must be populated for the import to be successful.

You may leave the cell in the **Job Access** column empty if the user should not have full access to current and future jobs. If the user should have full access, type all in the cell.

Note: You can give the user access to specific jobs later, using the **Manage Access** view.

You can import users who belong to more than one group—in the **User Group** column, separate the names of the groups by a space, a semicolon, and another space. For example, for a user who belongs to group A and group B, type Group A ; Group B. The specific user's name will be displayed in all the relevant groups.

If your group does not exist when you import the spreadsheet, the group will be created for you and the users will be added.

4. For each user, enter information in the cells of other columns as needed.

Note: You do not need to complete unshaded columns for the import to be successful. For example, you do not need to add their contact information.