

Importing user information

Requirements:

- An administration role that includes the Manage Access right
- A prepared spreadsheet

1. In the **Administration** area, click **Users**.
2. Click **Import User**.
3. In the **Import Users** area, click , and locate the spreadsheet you have prepared.
4. If the first row of the spreadsheet is *not* a heading row, clear the **First row of Excel Spreadsheet contains column names** check box.
5. Click **Upload**.
6. In the **User Information** area, you will see the list of user fields that appears in the user interface. A list is displayed next to each item. If the information is not mapped correctly, then from the list, select the correct reference.
For example, If username states **First Name**, from the list, select **Username**. Most of the information should be mapped correctly.
7. In the **Roles** area, in each list, select the column in the spreadsheet that contains the associated role.
 - Customer user example: if column **N** in the spreadsheet includes the administration roles, select **Column N** from the list beside **Admin Role**.
 - Staff user example: if in the **Roles** area, **Access to Job** is **None**, as it does not exist in the spreadsheet, you can map it to **Job Access** instead.
8. Click **Import**.
The system will warn you if there are any errors.
If you imported users with no access to jobs, you must give these users access to specific jobs.