Importing Users from an Excel File

To save time, you can add a list of users from an Excel file. This option will come in handy if you want to bulk upload your user database exported from your accounting system or when you need to transfer a large number of users to another group or department.

1. In the **Users** section, open the **Export/Import** menu and select **Import Users**.

2. In the **Import Users** window, download a sample file to import new users. To do this, click the **import template** link and save the file to your computer.

3. Add all necessary information about the users into the template. To make the importing feature work correctly, you should keep the original file structure intact.

Important:

1. For active users, leave the **Active** column blank or input **Yes**.

2. If you want to add inactive users, put **No** into the **Active** column.

3. The required columns are **Login** and **Department ID,** and all columns coinciding with the required user profile fields.

4. The **Email** column will appear in the import file only if the **Email** user profile field is required.

5. Leave the **Role** column in the import file empty.
All newly imported users will be assigned to the *Learner* role, and all existing users will keep the same role they had before. You will be able to change users' roles later after the import process is over.

5. The department ID can be checked and copied when editing a department.

6. Every user can be added to an unlimited number of groups, and each of the groups requires a separate column to be created.

7. Let's say the import file contains existing account users and has some **Group** columns (populated or empty). After the importing process is complete, those users will be excluded from the groups they previously belonged to and will be added to the groups specified in the **Group** columns.

If none of the **Group** columns was populated, the imported users won't belong to any group.

8. To add users to a new group without excluding them from existing groups, delete all the **Group** columns and add a new **Add to Group** column. After the importing process is complete, users will be added to the new group and will remain in the groups they previously belonged to.

9. The **Group** or **Add to Group** columns cannot be used simultaneously. The importing process when using both the **Group** or **Add to Group** columns will fail and you will see an error message.

10. If you specify a new group that doesn't exist yet in the account in the **Group** or **Add to Group** column, it will be added to the group list after the importing process is complete. It will be populated with the imported users.

11. Users imported from an Excel file can be added only to standard groups, not smart groups. If you put a smart group name in the **Group** or **Add to Group** column, users will be successfully imported, but won't be assigned to the specified smart group.

12. There are **two ways** to set up passwords for newly imported users:

- Add passwords into the template. The password security level can be set in the Settings section.
- Imported users will receive an invitation email (if you check that option in the **Import Users** window and the email addresses are added to the file). As soon as users follow the link in the email, they will be able to set a password for their account.

4. Upload the file with the user list. To do this, hit the **Browse...** button, select the file on your computer and click **Open**.

Import Users   ✕

① Download the import template to add new users.
  To update existing users, use the export function in the Manage Users section.

② Fill in the template with user information
  Read more about how to fill in the template.

③ Select a file with a populated template

  [   ]   Browse...

Open   ✕

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[Import]   [Cancel]

5. Add an invitation message for the imported users. To do this, select **Send an email invitation to enter learning portal** and modify the message as you wish.

Import Users   ✕

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Read more about how to fill in the template.

③ Select a file with a populated template

| template.xlsx | Browse… |

④ Set up notifications for new users

☑ Send an email invitation to enter the learning portal

Below are your access details for acc Training. You can use this information to log in to acc Training and view content.

To log in, follow this link: https://my.ispringlearn.com or copy it to your browser's address bar.

Import   Cancel

6. Hit the **Import** button.

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   browser's address bar.

   Import 🖑   Cancel

7. If the **Delete users while importing from XLSX** option is enabled, you will be asked to confirm that you are ready to update your user list fully. In
   other words, only users from the imported file will remain in the account, and all others (aside from *Account Owner*) will be deleted.

Update User List   ✕

Are you sure you want to update the list of users?

Attention: If users are not in the uploaded file, they will be
permanently deleted from the system.

Update   Cancel

8. After the importing process is complete, you will see a pop-up window announcing its results. Here you can copy results and possible errors. Click **Done** to go to the user list.
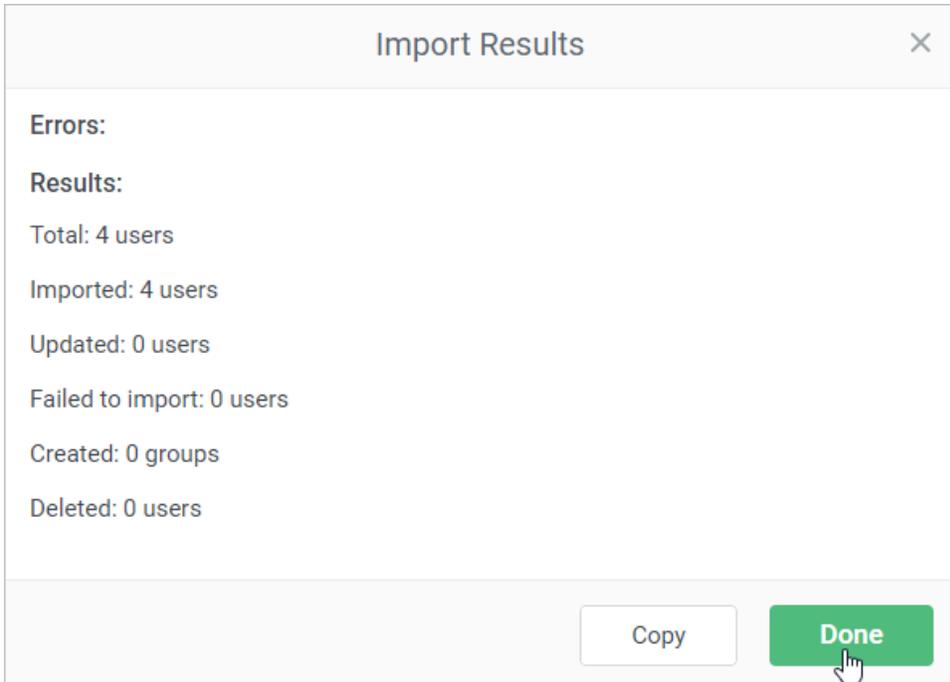
Import Results   ✕

Errors:

Results:

Total: 4 users

Imported: 4 users

Updated: 0 users

Failed to import: 0 users

Created: 0 groups

Deleted: 0 users

Copy   Done