

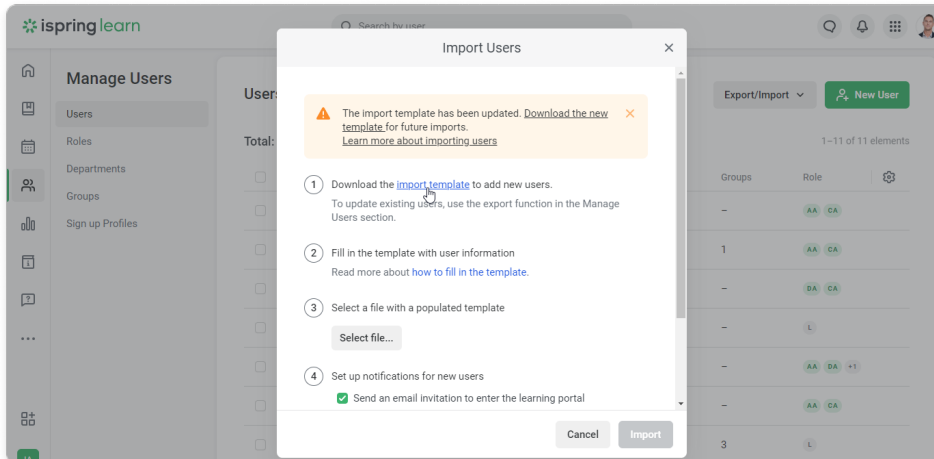
Importing Users from an Excel File

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 many users to another group or department.

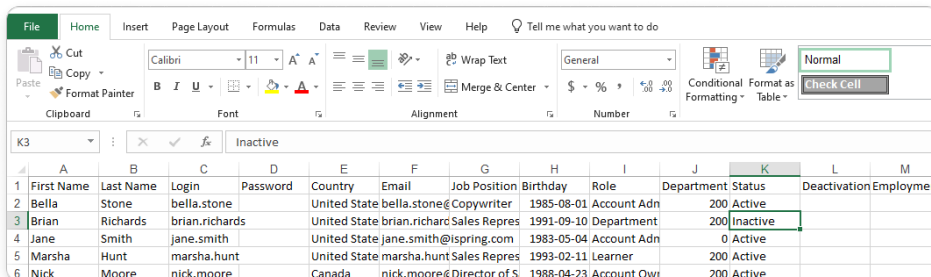
1. In the **Users** section, open the **Export/Import** menu and select **Import Users**.

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2. In the **Import Users** window, download an import template. To do this, click on the 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.



	A	B	C	D	E	F	G	H	I	J	K	L	M
	First Name	Last Name	Login	Password	Country	Email	Job Position	Birthday	Role	Department	Status	Deactivation	Employment
1	Bella	Stone	bella.stone		United State	bella.stone@Copywriter		1985-08-01	Account Adn	200	Active		
2	Brian	Richards	brian.richards		United State	brian.richard	Sales Repres	1991-09-10	Department	200	Inactive		
3	Jane	Smith	jane.smith		United State	jane.smith@ispring.com		1983-05-04	Account Adn	0	Active		
4	Marsha	Hunt	marsha.hunt		United State	marsha.hunt	Sales Repres	1993-02-11	Learner	200	Active		
5	Nick	Moore	nick.moore		Canada	nick.moore@Director of S		1988-04-23	Account Owi	200	Active		

Important:

1. You can enter one of the 3 statuses in the **Status** column: [Active](#), [Inactive](#) or [Employment Ended](#).
2. The required columns are **Login** and **Department ID**, and all columns coinciding with the required [user profile fields](#).
3. The **Email** column will appear in the import file only if the **Email** user profile field is [required](#).
4. 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.

	G	H	I	J	K	L	M	N	O	P	Q	R	S
	Job Position	Birthday	Role	Department	Status	Deactivation	Employment	Employee su	Employee fu	Group	Group	Group	Group
1	Copywriter	1985-08-01	Account Adn	200	Active				No	Active Sales	Discussion G	Product Training	
2	Sales Repres	1991-09-10	Department	200	Inactive				No	Active Sales	Discussion G	Product Training	
3	ispring.com	1983-05-04	Account Adn	0	Active				No	Active Sales	Discussion G	Product Training	
4	Sales Repres	1993-02-11	Learner	200	Active				No	Active Sales	Discussion G	Product Training	
5	Director of S	1988-04-23	Account Ow	200	Active				No	Active Sales	Discussion G	Product Training	

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.

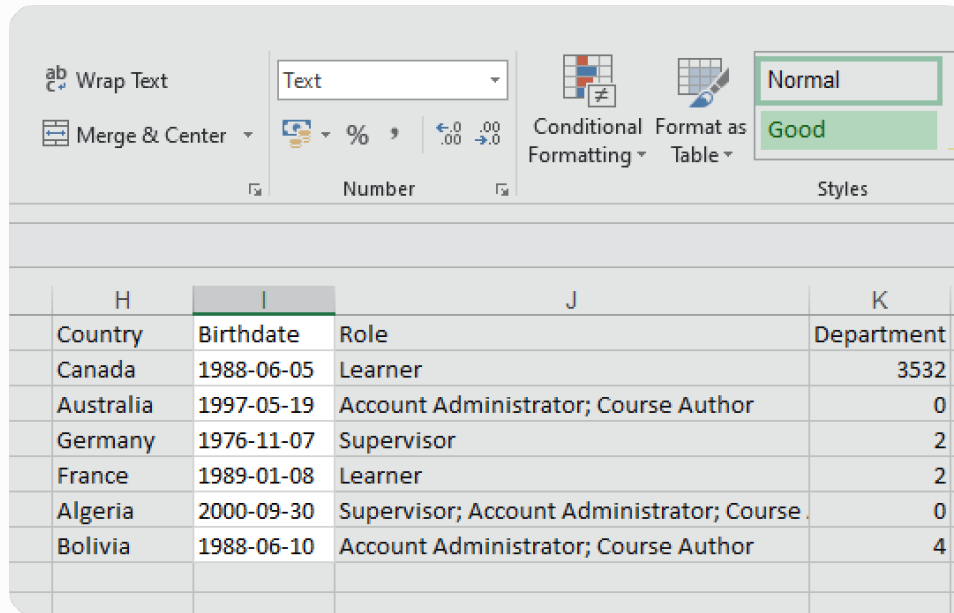
13. The phone number should start with "+".

	A	B	C	D	E	F	G	H	I	J
	First Name	Last Name	Login	Password	Country	Email	Phone	Job Position	Birthday	Role
1	Bella	Stone	bella.stone		United State	bella.stone@+1800 222		Copywriter	1985-08-01	Account Adn
2	Brian	Richards	brian.richards		United State	brian.richard@+1800 333		Sales Repres	1991-09-10	Department
3	Jane	Smith	jane.smith		United State	jane.smith@+1800 444 2224		Sales Repres	1983-05-04	Account Adn
4	Marsha	Hunt	marsha.hunt		United State	marsha.hunt@+1800 555		Sales Repres	1993-02-11	Learner
5	Nick	Moore	nick.moore		Canada	nick.moore@+1800 666		Director of S	1988-04-23	Account Ow

- Select the cell and right-click.
- Select **Format Cells...**

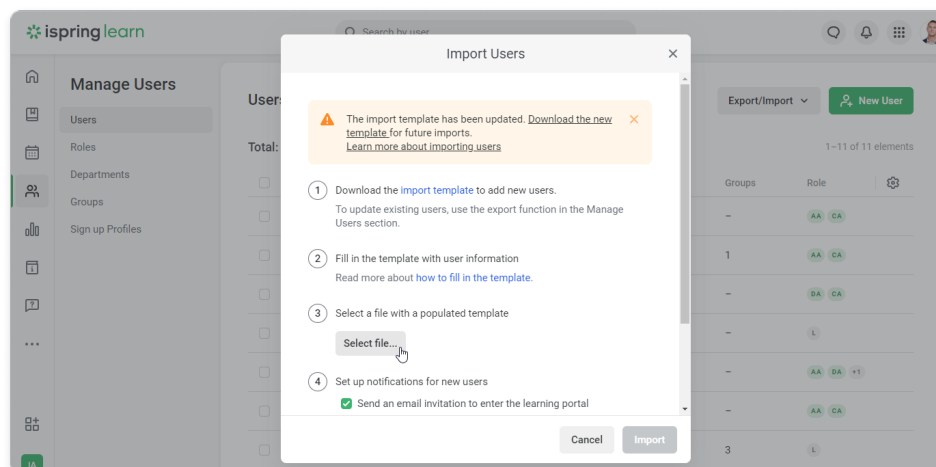
	A	B	C	D	E	F	G	H	I	J
	First Name	Last Name	Login	Password	Country	Email	Phone	Job Position	Birthday	Role
1	Bella	Stone	bella.stone		United State	bella.stone@+1800 222		Copywriter	1985-08-01	Account Adn
2	Brian	Richards	brian.richards		United State	brian.richard@+1800 333		Sales Repres	1991-09-10	Department
3	Jane	Smith	jane.smith		United State	jane.smith@+1800 444 2224		Sales Repres	1983-05-04	Account Adn
4	Marsha	Hunt	marsha.hunt		United State	marsha.hunt@+1800 555		Sales Repres	1993-02-11	Learner
5	Nick	Moore	nick.moore		Canada	nick.moore@+1800 666		Director of S	1988-04-23	Account Ow

15. In the **Birthdate** field, enter a date in the "yyyy-mm-dd" Text format. Make sure [Birthdays](#) are enabled in your account settings.

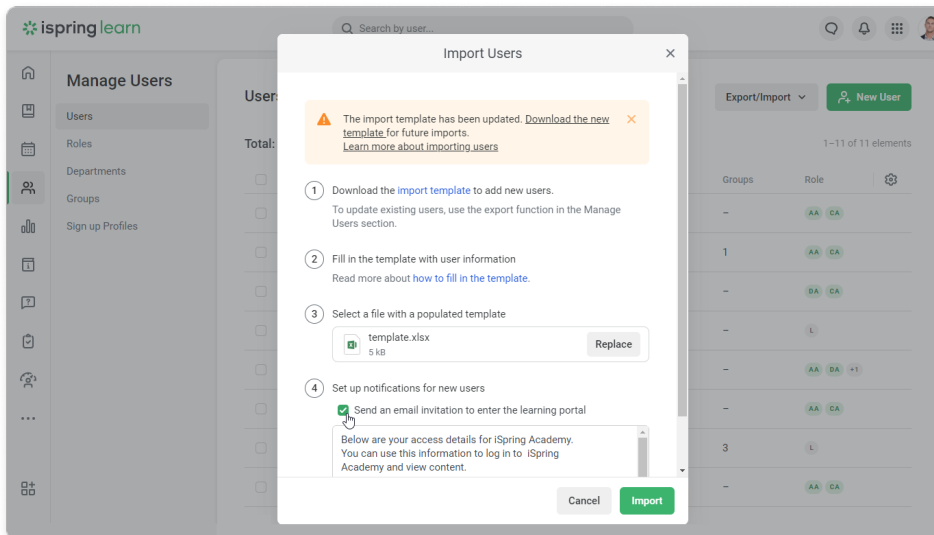


	H	I	J	K
	Country	Birthdate	Role	Department
	Canada	1988-06-05	Learner	3532
	Australia	1997-05-19	Account Administrator; Course Author	0
	Germany	1976-11-07	Supervisor	2
	France	1989-01-08	Learner	2
	Algeria	2000-09-30	Supervisor; Account Administrator; Course	0
	Bolivia	1988-06-10	Account Administrator; Course Author	4

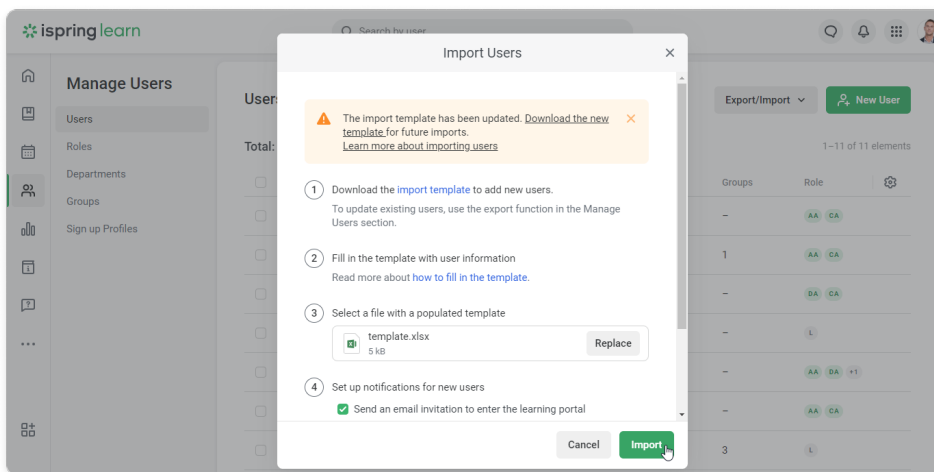
4. Upload the file with the user list. To do this, click on **Select file**, choose the file on your computer and click **Open**.



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



6. Click on **Import**.



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.
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.

