

Import Multiple Users

You can import a CSV (Comma Separated Values) file to add multiple users at once. To add an individual user, see [Add a User](#).



In previous Apperian releases, it was possible to use this feature to update the group membership of existing users. This functionality is no longer available as of October 2017.

Once you upload the CSV file, the Import Users page displays a preview which you can review and edit before committing to the import. The preview also highlights data with issues that must be resolved. Messages on the page itself describe the issues.



Tip

You can edit data directly on the page. This makes it easy to correct issues without uploading a new spreadsheet.



Before You Begin

Before you import multiple users, you must create a CSV file that lists the users you want to add. You can export this list from Microsoft Outlook or Active Directory, or you can create it using a spreadsheet program such as Microsoft Excel. For instructions, see [Create a CSV File to Import Users](#).

To import multiple users

1. On the navigation bar, click **Users**.
2. Click **Import Users** in the upper right corner to open the Import Users page.
3. In the File section, click **Choose File** and browse to select the CSV file containing the users you want to add.
 - The file is uploaded and analyzed for issues. This process may take several seconds; don't leave the page until the processing is complete. If there are issues in the file, the incorrect cells are highlighted and descriptive messages appear.
4. In the Options section:
 - a. Choose whether to send an email invitation to the imported users. Each user with an email address specified in the CSV file will receive an invitation that provides instructions for accessing Apperian. The invitation message includes a link to a page where the user can set a password.
 - **Best Practice:** Apperian recommends selecting Yes to ensure that new users set a password.
 - b. Choose a role to assign to the users. All users will be assigned the same role. You can edit individual users later to change their roles.
 - c. Choose one of the following options to specify how users in the CSV file should be added to groups:
 - **Use CSV Values**
 - This option assigns users to the group specified in Groups column in the CSV file.
 - **Choose Manually**
 - Use the list to select one or more groups. All users in the CSV file will be added to the selected groups.
 - This option ignores groups specified in the CSV file. Note that if you choose this option, values in the Groups column are replaced with "Manually selecting group."
5. If necessary, fix any issues. Either:
 - a. Edit the highlighted fields directly in the Preview section.
 - b. Edit the CSV file on your computer, then click **Choose File** to reimport the file.
6. Click **Import** to import the users. This may take several minutes.

After you click OK, you are redirected to the **Users** page. The new users don't appear right away, so you may have to refresh after a few minutes.

Troubleshooting

The following table describes the warnings you may receive when you attempt to import a users CSV file.



Most warnings do not prevent you from importing properly formatted users. If you upload a CSV file with warnings, the highlighted rows are ignored and those users are not added.

Error	Description
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<p>Invalid CSV file format</p>	<p>This is the only error that prevents you from adding any users.</p> <p>This can occur because:</p> <ul style="list-style-type: none"> • The spreadsheet is missing a required column. • The spreadsheet includes a column that shouldn't be there. • A column name is spelled incorrectly. <p>For a list of column requirements, see Create a CSV File to Import Users.</p> <p>This could also be a problem with the way it was exported. The previous link has instructions for exporting files from Microsoft Outlook or Active Directory. You can try to export the file again, or you can edit it using a spreadsheet application.</p>
<p>Users highlighted in yellow already exist in the organization and will not be imported.</p>	<p>The highlighted user already exists. You don't need to take any action here because the duplicate user will not be imported.</p>
<p>Users highlighted in blue are duplicates and will not be imported.</p>	<p>Two or more users in the CSV file have the same email address or user ID. Edit the highlighted cells to remove or change any duplicate email addresses or user IDs.</p>
<p>Values highlighted in red do not meet the requirements. Users associated with them will not be imported.</p>	<p>The data does not meet formatting requirements as described in Create a CSV File to Import Users.</p> <p>Specific issues include:</p> <ul style="list-style-type: none"> • First Name cannot be blank, and must be fewer than 100 characters. • Last Name cannot be blank, and must be fewer than 100 characters. • User ID cannot be blank, must be fewer than 100 characters, and can only contain the following characters: a-z, A-Z, 0-9, ~!\$%^&* _+=. @,,- • Email must be a valid email address. • Email is a required value when you choose the administrator role. • Groups must already exist within the organization. • Phone must be at least 7 digits and fewer than 50 digits. <p>Remember, you can edit cells directly in the preview section.</p>