

Importing (Users)

Overview

Importing any data from a template can only be done by the Account Owner Admin. The templates will be provided and are simply .csv files with a header row. This document goes over the import process for a list of **User** records. The process is essentially the same for any import, but the data and template will be different.

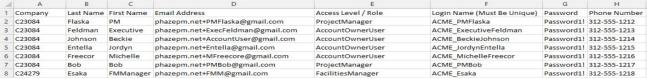
Importing New Users

When creating new users, you have the option to import via a .csv file with the provided template.

Users via Import Template

Please Note: For the **Company Attribute (Column A)** you will need to reference the **Company ID** from within PHAZE, from your current companies if you want to associate the users with a Company upon import. You can find the **Company ID** by: Navigating to the right menu and selecting **View or Edit Companies**

Step 1. Fill out the information for each user.



The template will consist of text fields, and yes or no options for specific configuration attributes which will be discussed later. (Note: All the attributes can be edited and changed once the user is imported.) Save your .csv file with your user information populated.

Step 2 Slide out the Right Menu and select Import Users

You will see this form.

Step 3

Select 'Column mapping is determined by template', in the drop down select the one option, Users.

Check the **Validate Data** box. Leave all other options as they are. For the **Data File**, select the .csv with your user data.

Click **Import**

You will see a success message.

