

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.

	A	B	C	D	E	F	G	H
1	Company	Last Name	First Name	Email Address	Access Level / Role	Login Name (Must Be Unique)	Password	Phone Number
2	C23084	Flaska	PM	phazepm.net+PMFlaska@gmail.com	ProjectManager	ACME_PMFaska	Password1!	312-555-1212
3	C23084	Feldman	Executive	phazepm.net+ExecFeldman@gmail.com	AccountOwnerUser	ACME_ExecutiveFeldman	Password1!	312-555-1213
4	C23084	Johnson	Beckie	phazepm.net+AccountUser@gmail.com	AccountOwnerUser	ACME_BeckieJohnson	Password1!	312-555-1214
5	C23084	Entella	Jordyn	phazepm.net+Entella@gmail.com	AccountOwnerUser	ACME_JordynEntella	Password1!	312-555-1215
6	C23084	Freecor	Michelle	phazepm.net+MFreeecore@gmail.com	AccountOwnerUser	ACME_MichelleFreecor	Password1!	312-555-1216
7	C23084	Bob	Bob	phazepm.net+PMBob@gmail.com	ProjectManager	ACME_PMBob	Password1!	312-555-1217
8	C24279	Esaka	FMManager	phazepm.net+FM@gmail.com	FacilitiesManager	ACME_Esaka	Password1!	312-555-1218

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.