User Management: Upload and Update Users

Purpose:

The Upload Users feature allows User Account Managers to bulk upload new users and update existing user accounts in TRAIN.

Administrative Roles with Access:
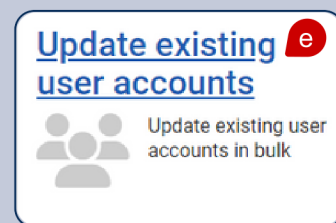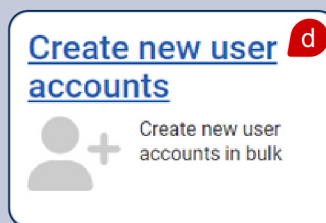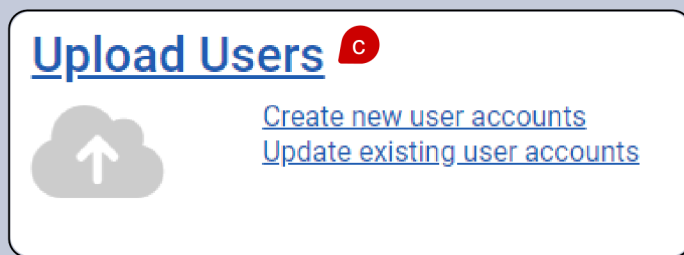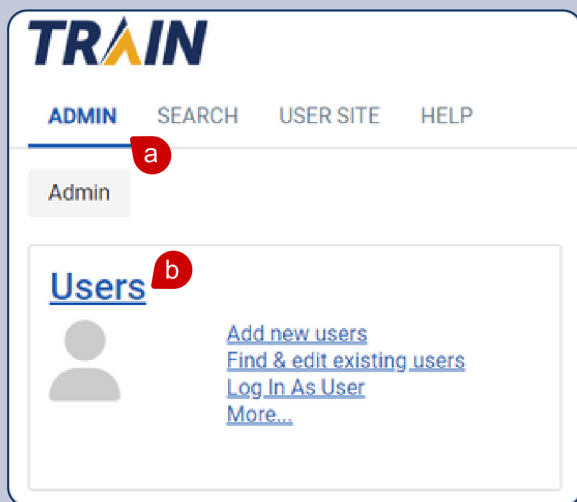
- **User Account Manager**

Table of Contents:

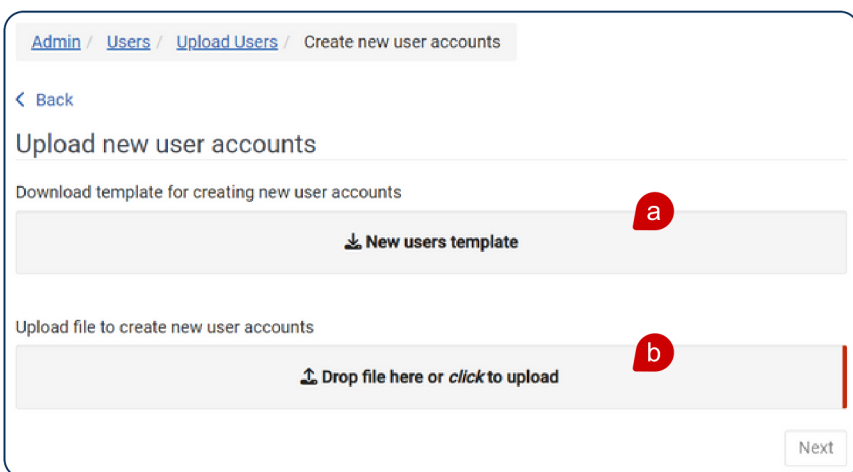**TRAIN**
From the Public Health Foundation

1 Navigate to Upload Users

Go to the **(a) Admin** menu. Click the **(b) Users** tile. Then, click the **(c) Upload Users** tile. From here, you can choose to **(d) Create new user accounts** and/or **(e) Update existing user accounts.**

TRAIN

ADMIN　SEARCH　USER SITE　HELP
a
Admin

Users **b**
Add new users
Find & edit existing users
Log In As User
More...

Upload Users **c**
Create new user accounts
Update existing user accounts

Create new user accounts **d**
Create new user accounts in bulk

Update existing user accounts **e**
Update existing user accounts in bulk

2 Create New User Accounts

Admin / Users / Upload Users / Create new user accounts

‹ Back

Upload new user accounts

Download template for creating new user accounts
⤓ **New users template** **a**

Upload file to create new user accounts
⬆ Drop file here or *click* to upload **b**

Next

Download the New users template, fill out the required information, and upload the New Users template onto TRAIN.
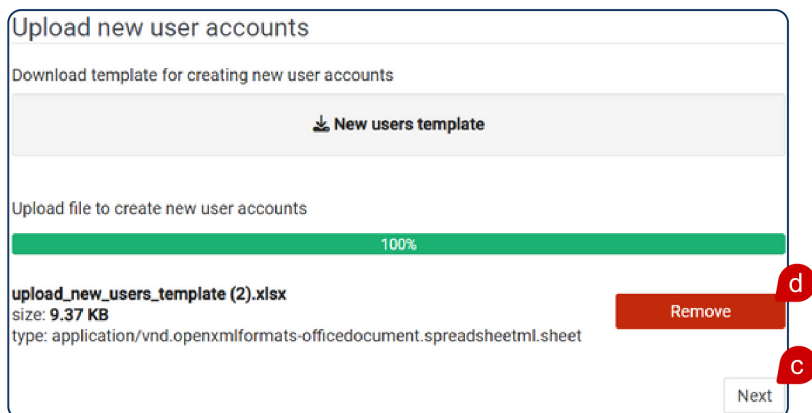
(a) Click the **New users template** button to download an editable .xlxs file. Required columns are marked in red.

(b) Drop the edited .xlxs file with the required information here, or click the button to upload the file to TRAIN.

(c) Click the **Next** button.

Upload new user accounts

Download template for creating new user accounts
⤓ **New users template**

Upload file to create new user accounts
100%

upload_new_users_template (2).xlsx
size: **9.37 KB**
type: application/vnd.openxmlformats-officedocument.spreadsheetml.sheet

Remove **d**

Next **c**

TIP: You **must** fill all required columns to upload new user accounts successfully. Required fields include Login, Last Name, First Name, Email, Organization, Address 1, and Zip Code.

(d) Click the red **Remove** button if you want to delete the file from TRAIN and add a new one.

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2 Create New User Accounts (continued)

Make additional user settings selections.

Upload new user accounts

Select groups where user accounts will be assigned to.
At least one group is required.

Availability

Add

National ×

Back

Next

(e) Click the blue **Add** button to place the user in a Group(s). This selection will apply to all users listed in the uploaded template.

(f) Click the **Next** button.

Email Notification

⦿ Notify users about updated accounts

Enter additional text to Welcome email notification (optional)   Preview email notification

Your comments here

○ Skip email notification

(g) If you want to notify users about their new accounts, check this option.

(h) If you do **not** want to notify users about their updated accounts, check the **Skip email notification** option.

(i) Click the blue **Create new user accounts** button.

Back

Create new user accounts

Once you have created new user accounts, the following screen below will appear with **(j)** the number of user accounts created, **(k)** the number of failed user account creations, and **(l)** the error that prevented successful account creation.

The file has been uploaded

Welcome email notifications have been sent to new users

User accounts created: 0
Failed: 2

The following records were not processed due to errors:

Export

Export All

Export Errors

Login Name (Email)	First and Last Names	Organization	Error
loginname1 (email123@email.com)	jane doe	PHF	Login Name "loginname1" already exists in the system
loginname2 (email321@email.com)	jon doe		Organization is required.

Close

If you want to view an .xlxs file record of the account creation data, click the **(m) Export** button and select whether you want to view **(n)** all account data or just **(o)** the failed user account creations.

If there are no listed errors, click the **(p) Close** button to exit the page.

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Update Existing User Accounts

3

Download the Update users template, fill out the required information, and upload the Update Users template onto TRAIN.

(a) Click the **Update users template** button to download an editable .xlxs file. Required columns are marked in red.

(b) Drop the Update Users file here, or click the button to upload the file to TRAIN.

(c) Click the **Next** button.

(d) Click the red **Remove** button if you want to delete the file from TRAIN and add a new one.

TIP: You **must** fill all required columns to upload new user accounts. Required fields include User ID, Login, Last Name, First Name, Email, Organization, Address 1, and Zip Code.

(e) If you want to notify users about their account updates, check this option.

(f) If you do **not** want to notify users about their updated accounts, check the **Skip email notification** option.

(g) Click the blue **Update user accounts** button.

Once you have created new user accounts, the following screen below will appear with **(h)** the number of user accounts updates, **(i)** the number of failed user account updates, and **(j)** the error that prevented successful account updates.

If you want to view an .xlxs file record of the account update data, click the **(k) Export** button and select whether you want to view **(l)** all account data or just **(m)** the failed user account updates.

If there are no listed errors, click the **(n) Close** button to exit the page.