

*ProFuturo*

# Bulk Import Manual

UN PROGRAMA DE:



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This document explains, step-by-step, the **bulk user importing process by the Admin profile**.

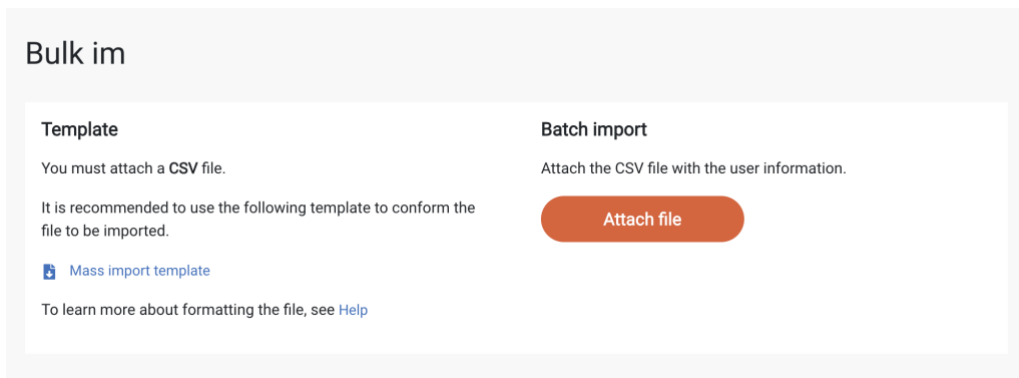
As a Classroom Experience coach, by clicking on the **top tab “Management”**, the user will be able to access the bulk user import feature.

Bulk import allows you to **register new users whose email (primary key) does not exist in the platform and update the data** of those that do exist.

**The bulk importer does not assign users within groups**; it only creates them on the platform. Users can then **access the groups via a code**.

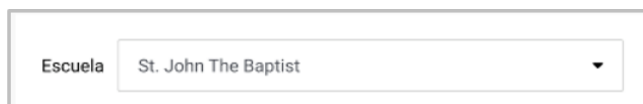
## Steps to follow via the Admin profile

1. As a coach, the user will have the **“Management” option available in the Classroom Experience menu**.
2. After clicking on “Management”, he/she will be taken to the **import page**:



The screenshot shows a web interface for bulk importing users. It has a title 'Bulk im' at the top. Below it, there are two main sections: 'Template' and 'Batch import'. The 'Template' section contains instructions: 'You must attach a CSV file.', 'It is recommended to use the following template to conform the file to be imported.', a link 'Mass import template' with a download icon, and a link 'To learn more about formatting the file, see Help'. The 'Batch import' section contains the instruction 'Attach the CSV file with the user information.' and a large orange button labeled 'Attach file'.

In the design of the import page **the School selector** (at the top) is missing; this field **will be displayed only to coaches that belong to more than one school** and in this case it should be similar to this field:



The screenshot shows a dropdown menu for selecting a school. The label 'Escuela' is on the left. The dropdown box contains the text 'St. John The Baptist' and a downward arrow on the right.

3. On the import page, the user can click on:
  - **“Bulk import template”** and a file with a short example of the document to be filled in will be downloaded.

- “**Help**” to be sent to the platform’s helpline.
4. When you click on “**Attach file**”, the browser’s **file selector** will open (**it will only accept .csv files**).
  5. Once the file has been uploaded, you will be taken to a **preview screen of the file**.

If the preview **did not detect any errors** it will be displayed:

- X new users will be registered
- X users’ data will be updated

### Confirm the import

First check that the file is correct and then click the 'Import' button to finish the batch import.

- 0 new users will be registered
- Data of 5 users will be updated

Import
Cancel

Line	Status	Name	Surname	Email address	Password	Username	Role	Date of birth	Gender	Disable	Reason
1	Update	User	Demo 1	user1@fake.com	1234	user1	S	1984	O	0	E
2	Update	User	Demo 2	user2@fake.com	12345.Aa	user2	T	15/04/1984	O	0	E
3	Update	User	Demo 3	user3@fake.com	12345.Aa	user3	A	15/04/1984	O	0	E
4	Update	User	Demo 4	user4@fake.com	12345.Aa	user4	D	15/04/1984	M	0	M
5	Update	User	Demo 5	user5@fake.com	12345.Aa	user5	L	15/04/1984	F	0	U

Here the user will be able to see the data prior to uploading. Click on:

- **Cancel:** it will return to the initial import page, without any upload/change of data.
- **Import:** the import process will start.

If the import process **detects errors**, it will display:

Confirm the import

**File could not be imported**

Review and correct errors and then attach the file again.

Attach file

1 Errors

Line	Status	Name	Surname	Email address	Password	Username	Role	Date of birth	Gender	Disable
1	Update	User	Demo 1	user1@fake.com	1234	user1	S	1984	O	0
2	Update	User	Demo 2	user2@fake.com	12345.Aa	user2	T	15/04/1984	O	0
3	Update	User	Demo 3	user3@fake.com	12345.Aa	user3	A	15/04/1984	O	0
4	Update	User	Demo 4	user4@fake.com	12345.Aa	user4	D	15/04/1984	M	0
5	Error	User		user5@fake.com	12345.Aa	user5	L	15/04/1984	F	0

User surnames may not be left blank.

**A new file can be re-attached** via this screen, which will take the user back to its **preview screen** (point no. 5).

**If the import process has been successful**, the **successful import mode** will be displayed at the end of it on the initial import screen, and the number of users that are created/updated will also be displayed.

Users have been imported successfully.

## Fields defined for the importer

The fields defined for the importer are (\* = mandatory field):

- **Username:** Alphanumeric characters.
  - **First name\*:** Alphanumeric characters.
  - **Surname(s)\*:** Alphanumeric characters.
1. **Date of birth\*:** Date format: day/month/year. (e.g., 15/04/1984.). **In the case of students, only the year of birth will be indicated. (e.g. 2015).**

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- **Gender\***: possible values:
  - F = Female
  - M = Male
  - O = Other
  - N = None/Would rather not say
- **email\***: Primary key and unique user identifier. Email format. It is the only field that cannot be updated from the bulk importer, as it is a primary key.
- **Role\***: Field to define the role at system level (not at subject/group level) - possible values
  - S = Student, pupil
  - T = Teacher
  - A = Admin
  - D = Director, School Principal
  - L = Leader, Lead Teacher
- **Password:**
  - Can be left blank for data updates (existing users). When blank, the user's current password is not updated.
  - The password must be filled in for user registration, according to the "role" field of the uploaded file, we need to include:
    - role = "S", minimum password restrictions
    - 1. role = "T", "A", "D", "L" greater restrictions than the student password, as it needs to be more robust. Passwords must be at least 8 characters long:
      - 1. Passwords must have at least 1 lowercase letter(s).
      - 2. Passwords must have at least 1 uppercase letter(s).
      - 3. Passwords must be at least 1 non-alphanumeric character(s) such as \*, -, or #.
- **Disable:** possible values:
  - 0: user activated (by default).
  - 1: user deactivated.
  - 1. To "Create" you don't have to put anything
- **Reason:** possible values:
  - E = Error

- M = Migration
- U = Unsubscribe
- R = Regression, Egressed