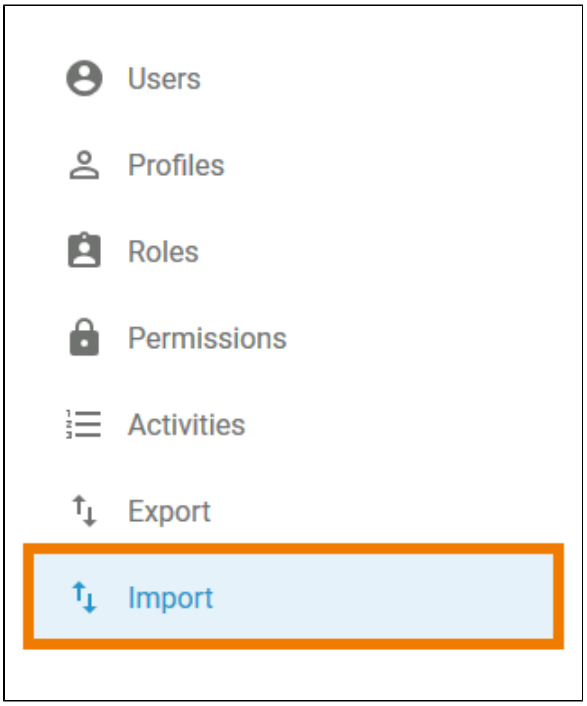
Importing User Data

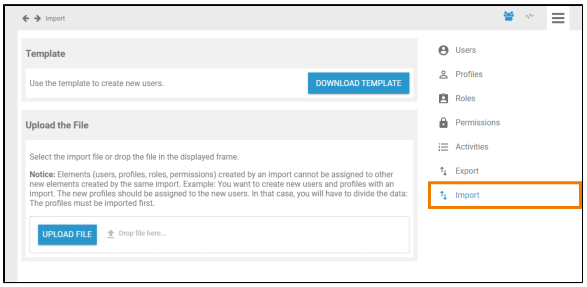
Using Menu "Import"



You can import the following elements and their properties:

- **Users**
- **Profiles**
- **Roles**
- **Permissions**

Use menu **Import** to import data into your **PAS** user management.



Menu **Import** consists of two sections:

- **Template**
- **Upload the File**

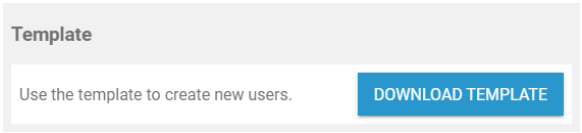
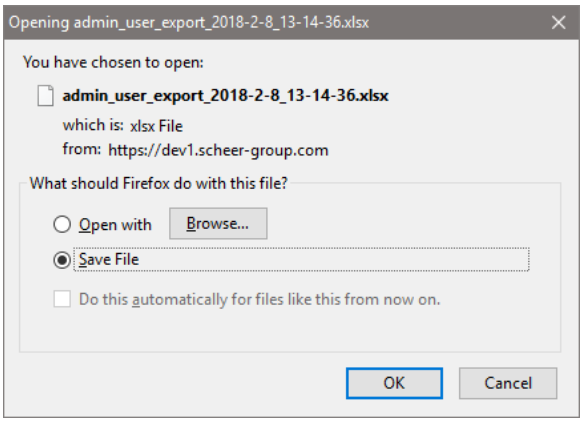
Using the Template

On this Page:

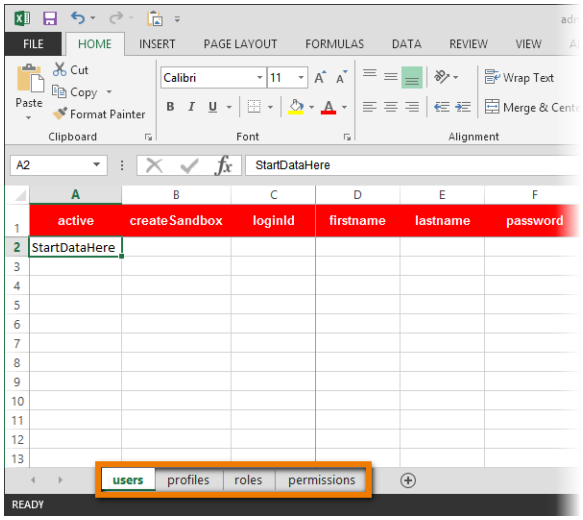
- Using Menu "Import"
- Using the Template
  - Overview of the Template's Content
    - User Properties
    - Profile Properties
    - Role Properties
    - Permission Properties
  - Importing Data

Related Pages:

- Exporting User Data
- Managing Users
- Managing Profiles
- Managing Roles
- Managing Permissions

	The structure of the import file must correspond to the objects and their properties in the user management. Only correctly structured files can be imported. Therefore, we recommend to use the template provided in section **Template.** The Excel file is properly formatted and contains all necessary columns. Use button **Download Template** to save the file to your computer.
	Confirm the download in the pop-up window to open or save the template.

Overview of the Template's Content



For every uploadable element you can find a separate tab in the Excel template:

- **users**
- **profiles**
- **roles**
- **permissions**

Every tab contains the preconfigured columns needed for the properties of this specific element.

Mandatory fields are marked red.

Import of Profiles or Roles

If you want to import profiles or roles, please note that you need to use the profile/role ID. The ID has to be inserted in the import file with double quotes:

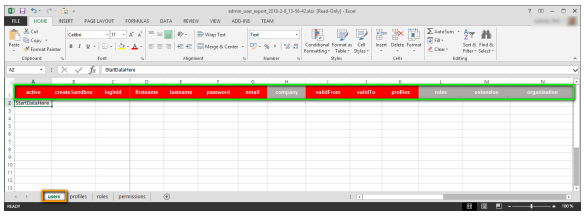
```
//Valid entry for a profile or role ID
["947c5d80-d969-11e5-839d-d5dcd95d29f0"]
```

Import of Boolean Values

The fields **active** and **create Sandbox** must contain boolean values:

- In an English Microsoft Excel application enter TRUE or FALSE.
- In a German Microsoft Excel application enter WAHR or FALSCH.

User Properties



With the help of the template, you can create new users including master data and additional data.

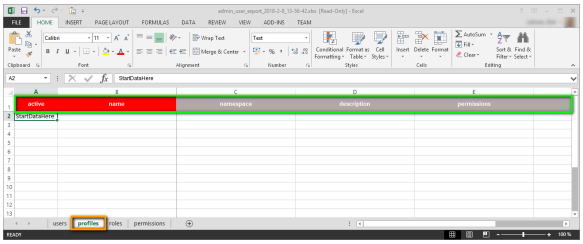
Open tab **users** in the Excel file to insert user data.

The following table is searchable and shows all user properties that can be specified in the template file:

- **Technical Name:** Name of the column in the template
- **User Property:** Name of the field in the user data sheet

Technical Name	User Property	Mandatory	Where to be found?
active	User active	✓	Menu "Users": Master Data
city	City	✗	Menu "Users": Additional Data
company	Company	✗	Menu "Users": Master Data
country	Country	✗	Menu "Users": Additional Data
create Sandbox	Create Sandbox	✓	Menu "Users": Master Data
department	Department	✗	Menu "Users": Additional Data
email	E-Mail	✓	Menu "Users": Master Data
extension	Technical Informations	✗	Menu "Users": Additional Data
fax	Fax	✗	Menu "Users": Additional Data
firstname	First Name	✓	Menu "Users": Master Data
lastname	Last Name	✓	Menu "Users": Master Data
loginId	Login	✓	Menu "Users": Master Data
mobile	Mobile	✗	Menu "Users": Additional Data
organisation	Organisation	✗	Menu "Users": Additional Data
password	Password	✓	Menu "User": Password
phone	Phone	✗	Menu "Users": Additional Data
profiles	Profiles	✓	Menu "Users": Profiles
roles	Roles	✗	Menu "Users": Roles
street	Street	✗	Menu "Users": Additional Data
validFrom	Valid from	✓	Menu "Users": Master Data
validTo	Valid until	✓	Menu "Users": Master Data
zip	ZIP	✗	Menu "Users": Additional Data

Profile Properties



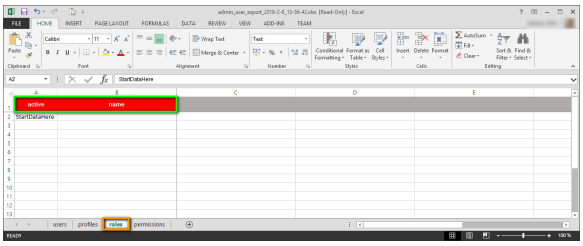
Create new or update existing profiles by inserting their properties into the import file.

To be able to do so, open tab **profiles** in the template file.

The following profile properties can be imported:

Technical Name	Profile Property	Mandatory	Where to be found?
active	Profile active	✓	Menu "Profiles": Master Data
name	Name	✓	Menu "Profiles": Master Data
namespace	Namespace	✗	Menu "Profiles": Master Data
description	Display Name	✗	Menu "Profiles": Master Data
permissons	Permissions	✗	Menu "Profiles": Permissions

Role Properties

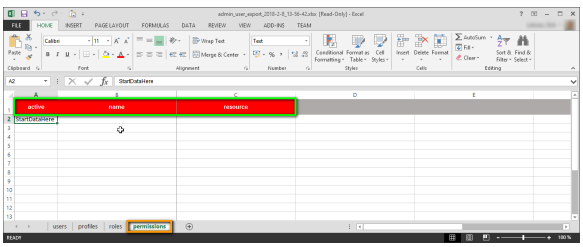


The properties of roles can be found in tab **roles** of the Excel template.

You can insert the following roles properties in the import template:

Technical Name	Role Property	Mandatory	Where to be found?
active	Role active	✓	Menu "Roles": Master Data
name	Name	✓	Menu "Roles": Master Data

Permission Properties



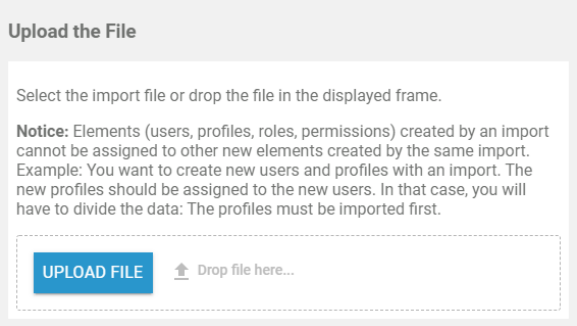
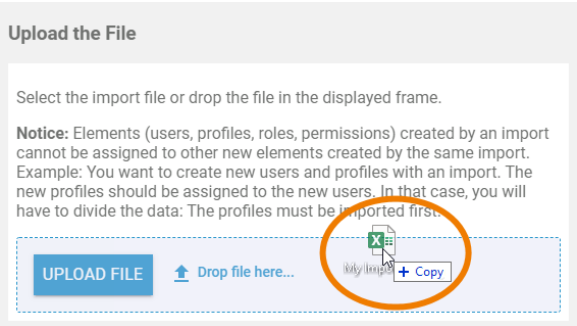
Open tab **permissions** in the template to insert the properties of permissions.

The following properties can be imported for permissions:

Technical Name	Permission Property	Mandatory	Where to be found?

active	Permission active	✓	Menu "Permissions": Master Data
name	Name	✓	Menu "Permissions": Master Data
resource	Permission	✓	Menu "Permissions": Permission

Importing Data

	Go to section **Upload the File** when you have inserted all data into the Excel template.
	You have two options to upload the import file: 1. Use drag and drop to place your document to the space marked **Drop file here** . 2. Click the **Upload File** button to select your file. ⚠

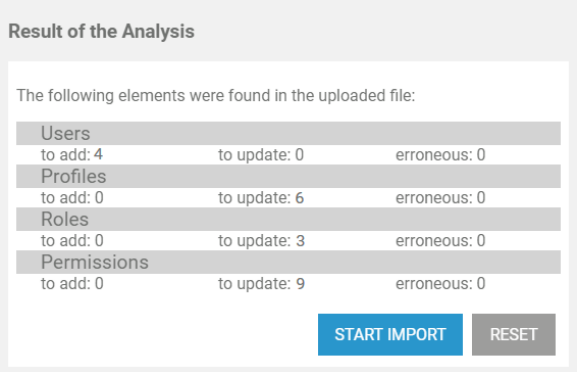
Please note, that elements such as users, profiles, roles and permissions created by an import cannot be assigned to other new elements created by the same import.

Example:

- You want to create new users and new profiles by the same import.

- The new profiles should be assigned to the new users.
- In that case, you will have to divide the import: The pro

files must be imported first, the users by a second import.



As soon as an import file has been uploaded, the content of the file will be analyzed.

In section **Result of the Analysis,** an overview will appear, showing the following information for all four elements:

- How many new objects will be created by the import?
- How many existing objects will be updated by the import?
- Does the import file contain erroneous data?

⚠ If the import file contains objects **to update**, the existing objects in the user administration portal will be overwritten.

Click **Start Import**, to import your file. If you want to stop the operation and cancel the import, click **Reset**.