

Import User and User Group Assignment (W5)

[This version is superseded. Click here to view the latest guide.](#)

PURPOSE

This document shows the detailed procedures on how to import user and user group assignment in CS Lucas system.








WHY IS THIS IMPORTANT?

This provides a faster way for setting up users and assigning user groups to users in the system.

PROCEDURE



1. From the main menu, select Set Up > Global > User and Rights.

User						
<div>Refresh New Delete De/Activate Approve Group </div>						
	App? 	Active 	UserID 	Full Name 	Valid Until 	MFA? 
<input type="checkbox"/>		Y	approver1	approver1	31 Dec 2099	
<input type="checkbox"/>		Y	approver2	approver2	31 Dec 2099	
<input type="checkbox"/>		Y	dev01@12dl2d.com	dev01	8 Dec 2019	

2. Click New.

New User

User ID*

Language

Valid To*

Email*

No IP Restriction ☐

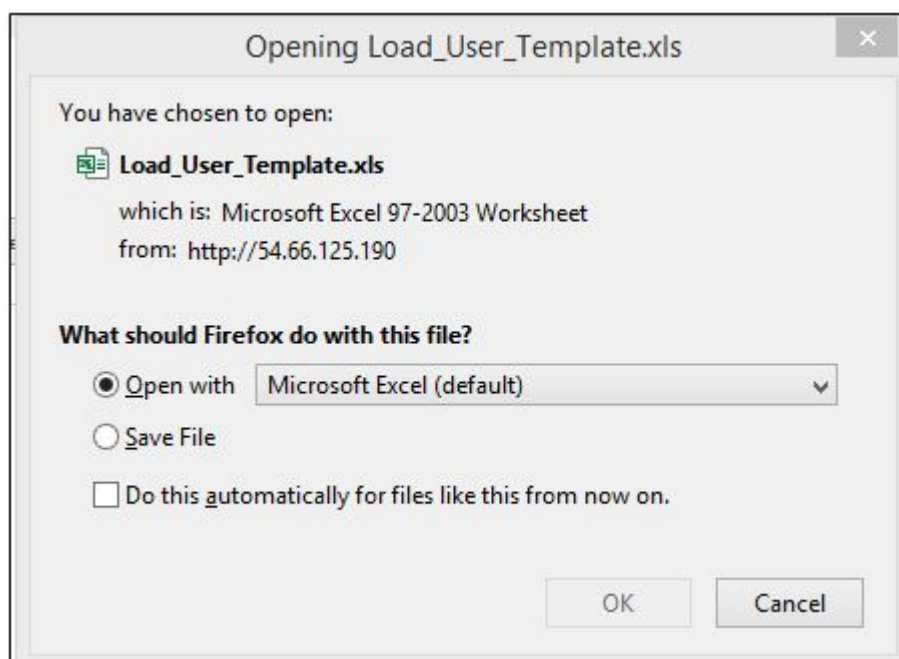
3. Click Import. The Import User screen displays.

Import User

☐ Read File

ID	User ID*	Language	Valid To*	Full Name	Email*	Department	No IP Restriction (Y/N)	User Group Assignment
No records found.								

4. Click Template to download CS Lucas template for importing user and user group assignment.



5. Save the file and open. An Excel sheet will be opened.

File	Home	Insert	Page Layout	Formulas	Data	Review	View	Help
Paste	Arial 10	B I U	Font	Alignment	Wrap Text	Merge & Center	General	\$ %
I16								
	A	B	C	D	E	F	G	H
1	User ID*	Language	Valid To*	Full Name	Email*	Department	No IP Restriction (Y/N)	User Group Assignment
2								
3								

6. Fill out the sheet. Fields with asterisks (*) are mandatory.

File	Home	Insert	Page Layout	Formulas	Data	Review	View	Help
Paste	Arial 10	B I U	Font	Alignment	Wrap Text	Merge & Center	General	\$ %
H16								
	A	B	C	D	E	F	G	H
1	User ID*	Language	Valid To*	Full Name	Email*	Department	No IP Restriction (Y/N)	User Group Assignment
2	john		31-Dec-50		john@tfs.com			UAGroup_dev;AU User Group
3	terry		31-Dec-50		terry@tfs.com			Approver

7. The following table shows the rules and validation check for importing user and user group assignment.

Field	Remarks
User ID*	Mandatory. User ID must be unique in the system.
Language	Optional. Leave blank will be defaulted to English (Default).
Valid To*	Mandatory. Date must not be a past date.
Full Name	Optional. Fill in the full name. This is a free text field.
Email*	Mandatory. Fill in the email address of the user. This is a free text field.
Department	Optional. Must be a valid value as per in the system.
No IP Restriction (Y/N)	Optional. Allowed values: Y or N or y or n.
User Group Assignment	Optional. This allows users to specify which user group the user should belong to. Users can specify multiple user groups separated by ";". For e.g. GroupA;GroupB;GroupXYZ User groups must be valid, i.e. approved and not deleted from the system.

8. Save the Excel file on the computer.

9. Go back to the Import User screen, tick on Read File checkbox.

10. Click Choose File. Browse for the file saved in the computer.

Import User

←

Template

Read File ☒

File

Read File

Browse...

Load_User_Template.xls

ID	User ID*	Language	Valid To*	Full Name	Email*	
No records found.						

11. Click Read File. The values inputted in the Excel File will display.

Import User

←

Load

Template

Read File ☐

ID	User ID*	Language	Valid To*	Full Name	Email*	Department	No IP Restriction (Y/N)	User Group Assignment
1	john		31 Dec 2050		john@tfs.com			UAGroup_dev;AU User Group
2	terry		31 Dec 2050		terry@tfs.com			Approver

12. If there is an error, the user will be prompted with the rows to be corrected. To make corrections, go to the Excel file to make the necessary corrections and click Read File again.

13. If there is no error, click Load.

14. A popup appears to confirm, click OK.

Confirm loading Users static data to the system?

OK

Cancel

15. A message saying that loading is successful will be displayed.

The Users has been successfully loaded.

16. Go back to the User screen, tick on the checkbox beside the user id imported.

User

Refresh

New

Delete

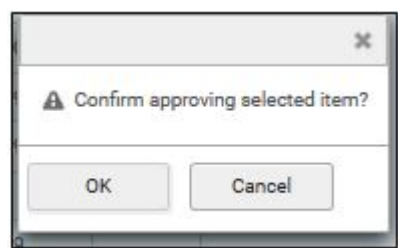
De/Activate

Approve

Group

	App? ▾	Active ▾	UserID ▾	Full Name ▾	Valid Until ▾	MFA? ▾
<input checked="" type="checkbox"/>	N	Y	john	john	31 Dec 2050	
<input checked="" type="checkbox"/>	N	Y	terry	terry	31 Dec 2050	
<input type="checkbox"/>		Y	approver1	approver1	31 Dec 2099	
<input type="checkbox"/>		Y	approver2	approver2	31 Dec 2099	
<input type="checkbox"/>		Y	dev01@12dl2d.com	dev01	8 Dec 2019	

17. Click Approve. A popup appears to confirm, click OK.



FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

[User Rights and Permissions](#)

CHANGE HISTORY

Date	By	Changes
24-Oct-2017	TS	Created.
25-Aug-2018	Silpa	Updated step 1.
20-Nov-2019	Lyra	Updated Screenshots.