Import User and User Group Assignment

See previous W5 version guide

PURPOSE

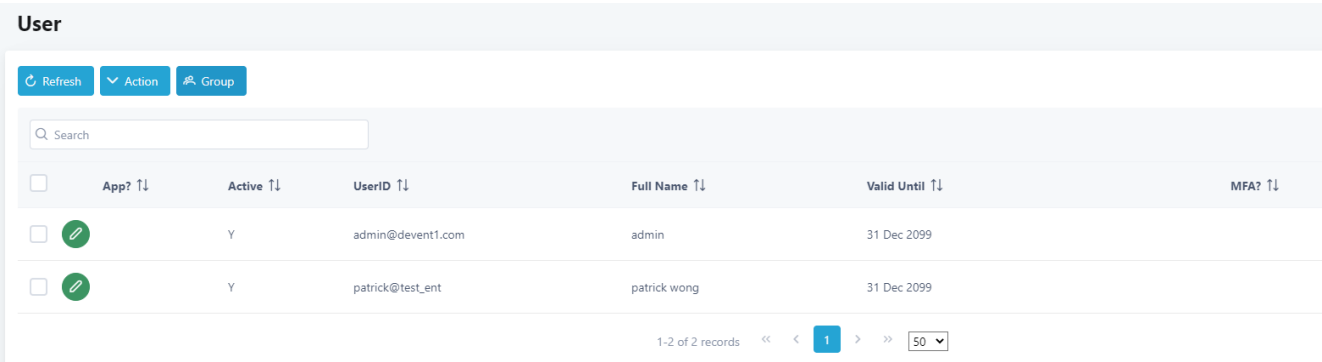
This document shows the detailed procedures on how to import user and user group assignment in CS Lucas system.

WHY IS THIS IMPORTANT?

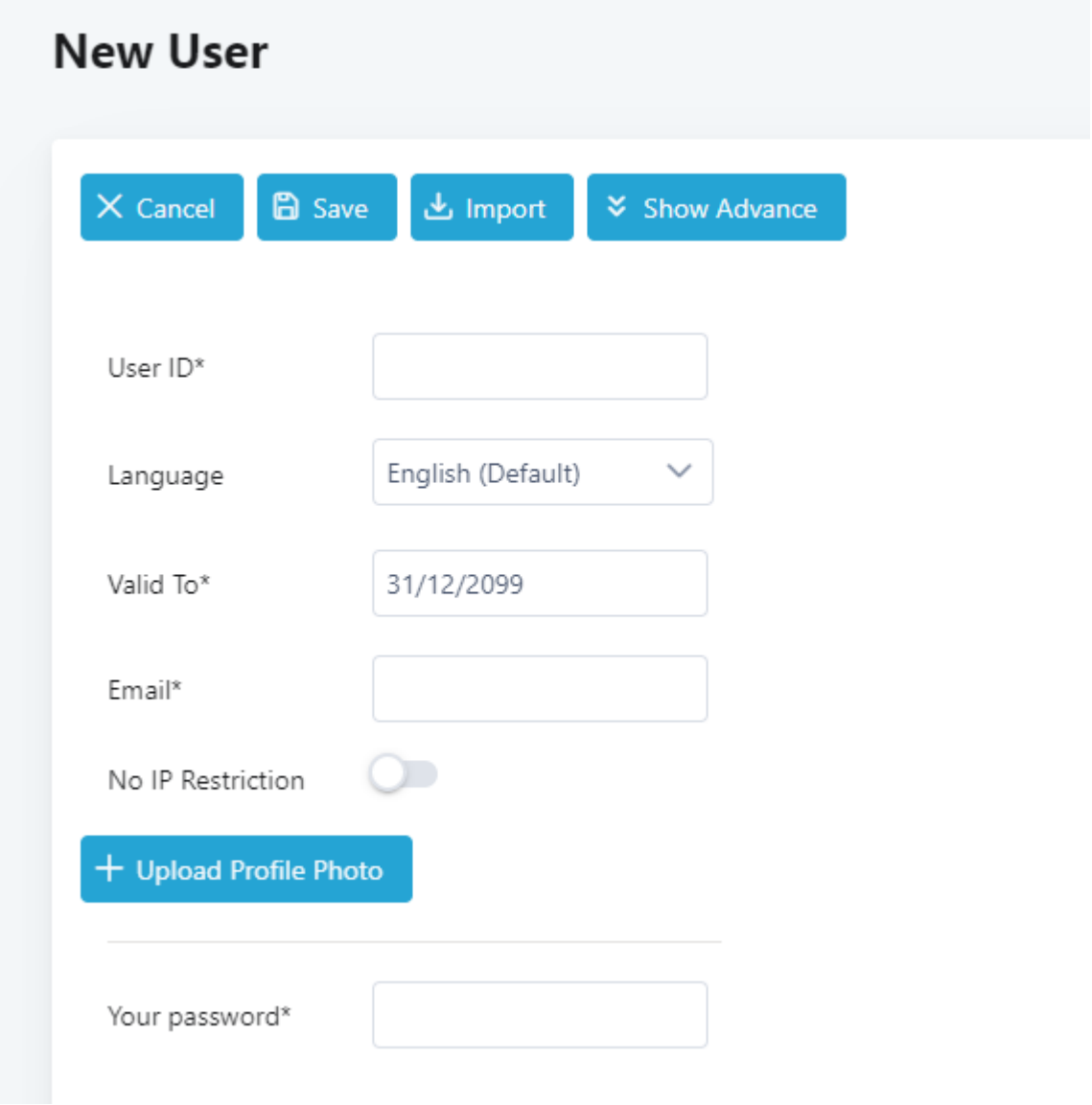
This provides a faster way for setting up users and assigning user groups to users in the system.

PROCEDURE

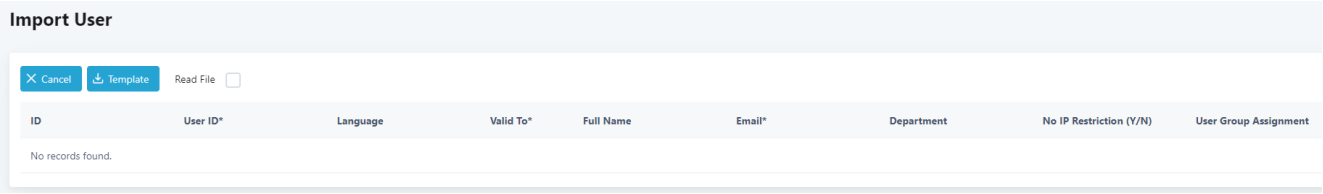
1. From the main menu, select Set Up > Global > User and Rights.



2. Click New.

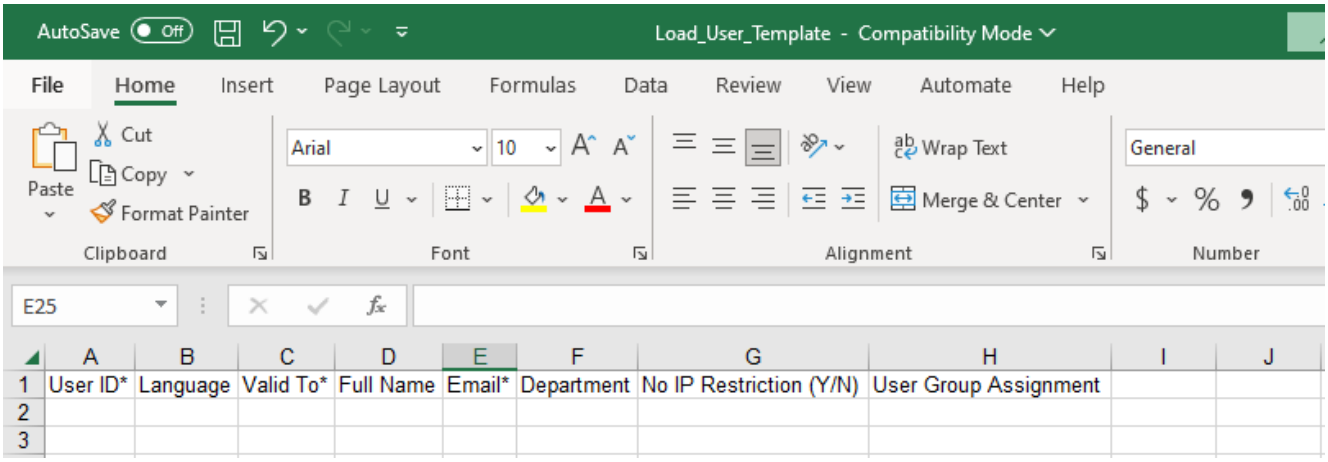


3. Click Import. The Import User screen displays.

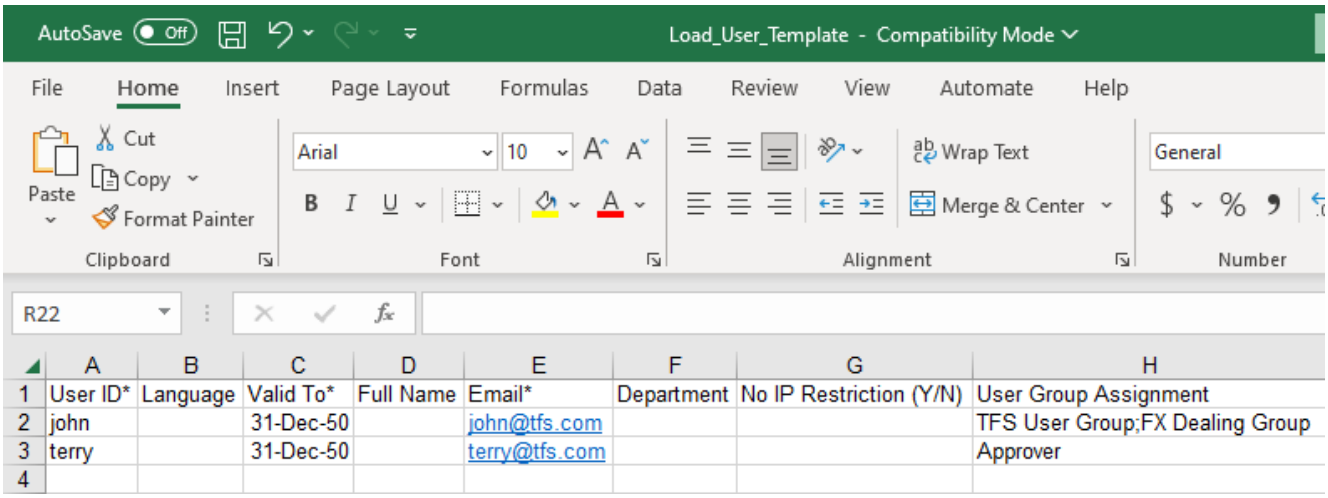


4. Click Template to download CS Lucas import template.

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



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



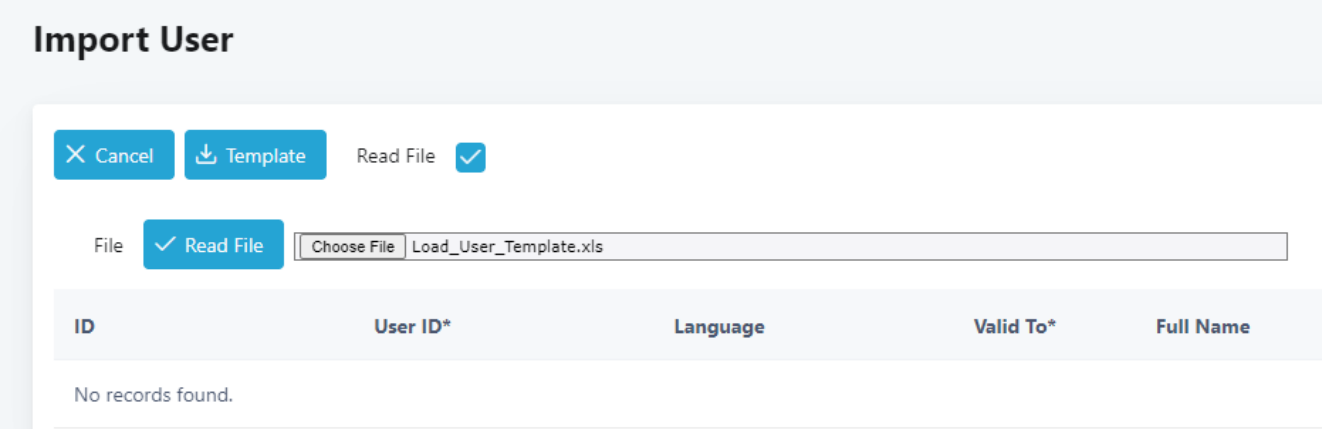
7. The following table shows the rules and validation check for importing user and user group assignment.

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.

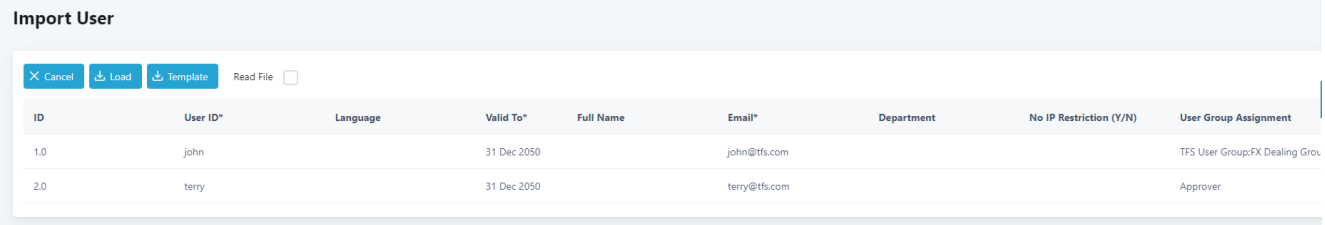
8. Save the Excel file on the computer.

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.



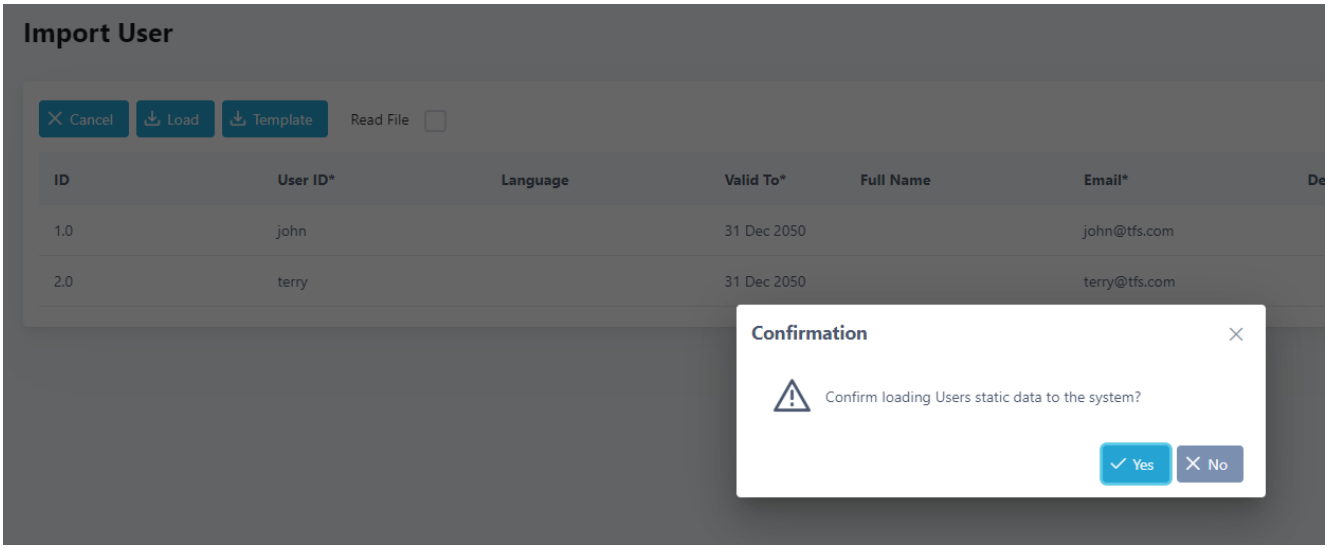
11. Click Read File. The values inputted in the Excel File will display.



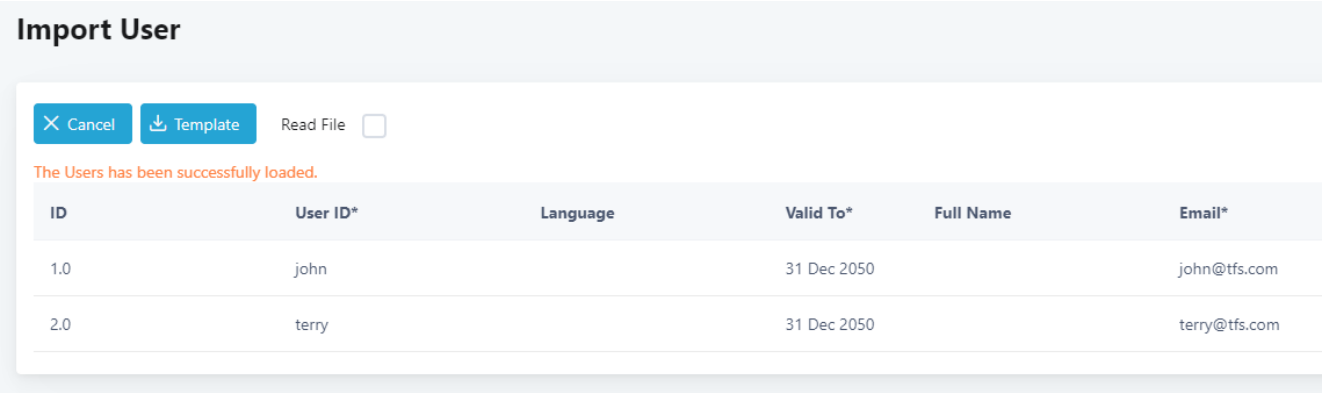
12. If there is an error, the user will be prompted with the rows to be corrected. To make corrections, go to the Excel file to make the necessary corrections and click Read File again.

13. If there is no error, click Load.

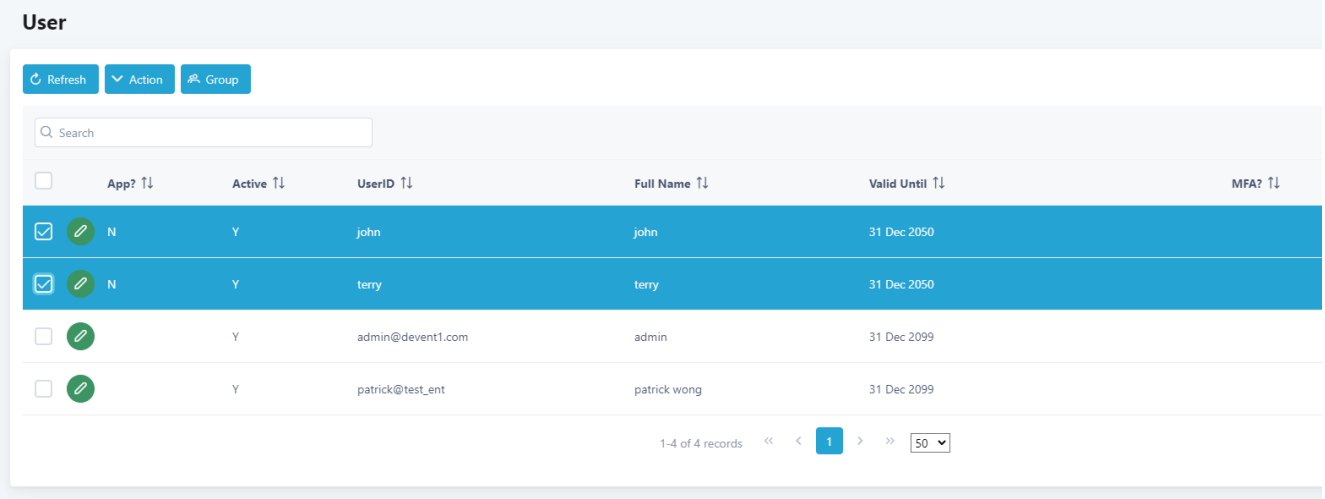
14. A popup appears to confirm, click Yes.



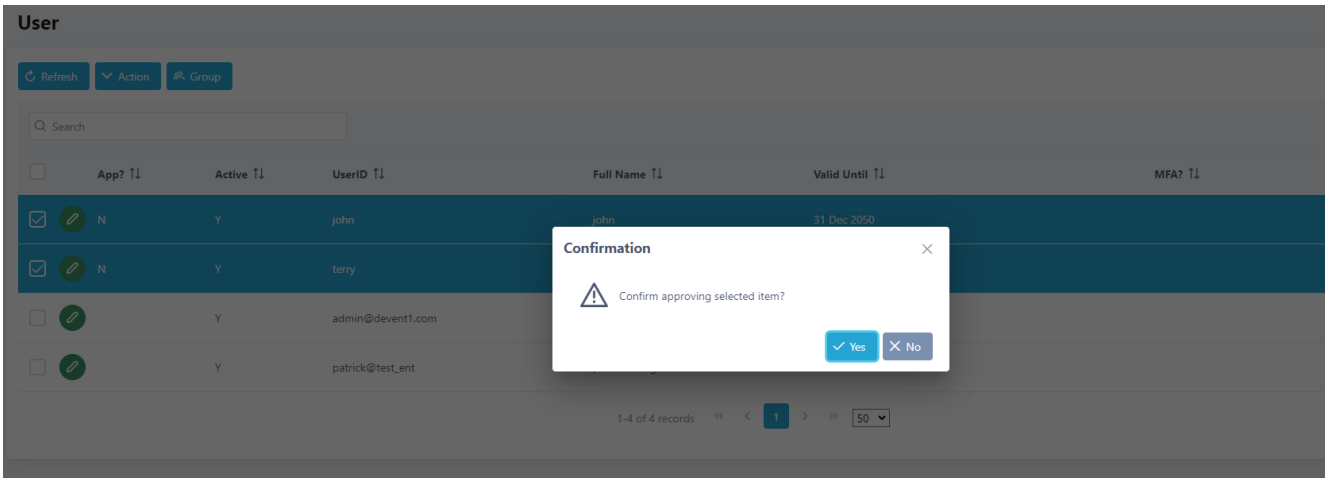
15. A message saying that loading is successful will be displayed.



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



17. Click Action and Approve. A popup appears to confirm, click Yes.



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.
12-Jan-2023	TS	Updated to W6 instructions and screenshots.