

Guidelines for Using the CSV Data Loader

Add New Users:

- Ensure that the data contained in the CSV conforms to the formatting required by the template as specified in the table below. Do not insert commas as these will cause subsequent data to be treated as a separate column.
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- If a new user is to be assigned to a particular organization structure, ensure that the entire organization hierarchy is included in the CSV. This could be a new or existing structure. For example, in an organization with four levels, you must include specifications for levels 1, 2, 3, and 4. You may not omit definitions for intermediate levels (i.e., Levels 2 or 3). Note that "n" levels are supported, although only 5 are shown below.
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- If an organization structure is not specified (i.e., levels and descriptions are left blank), the profile organization structure will be used if the option to use a profile has been checked. If a profile is not used, the user will be created with an organization structure of "Unassigned".
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- If an organization description for a certain level is entered but the corresponding description code is not, then the organization level will not be added. A warning message will appear in the log file.
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- When adding, the mandatory fields are: Action, UserID, FamilyName, GivenName, Password

Updating existing users:

- Ensure that the data contained in the CSV conforms to the formatting required by the template as specified in the table below. Do not insert commas as these will cause subsequent data to be treated as a separate column.
- Where supported, the reserved value "**NONE**" may be used to clear the field.
- Profiles are not used when updating existing users even if the option is checked.
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- Incorrectly formatted records will be rejected as invalid data.
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- When updating the only mandatory fields are: Action and User ID.

CSV Data Formatting (as in downloadable template)

Field	Content	Data Handling	Default
Action	Control Action (Either Add, Delete or Update)	Must be "A", "D", "U", or "AU" (Add, Delete, Update, Add or Update as appropriate)	None

UserID	NetDimensions User ID	A Unique ID That Conforms to NetDimensions ID constraints (maximum 85 characters)	None
BirthDate(dd-MMM-yyyy)	Date of Birth	<p>The following date formats are supported:</p> <ul style="list-style-type: none"> dd-mm-yy (e.g. "31-12-13") dd-mm-yyyy (e.g. "31-12-2013") dd-mmm-yy (e.g. "31-dec-13") dd-mmm-yyyy (e.g. "31-dec-2013") <p>A string of "NONE" implies no specified date.</p> <p>For dd-mm-yy and dd-mmm-yy formats where the year component may be ambiguous, the date is assumed to be in the past unless it results in a date that is over 80 years ago, in which case it will be assumed to be a date in the future.</p>	None
City	Contact Info - City	Any Text (Max field length:50)	None
Company Address 1	Contact Info - Address 1	Any Text (Max field length:150)	None
Company Address 2	Contact Info - Address 2	Any Text (Max field length:150)	None
CompanyName	Contact Info - Company Name	Any Text (Max field length:50)	None
Cost Center	Cost Center	Any Text (Max field length:45)	None
Cost Center Name	Cost Center Name	Any Text (Max field length:85)	None
Country	Contact Info - Country	Any Text (Max field length:3) Note: ISO 3166-1 alpha-3	None
DeptId	Department ID	Any Text (Max field length:85)	None
Department	Department Name	Any Text (Max field length:85)	None
Direct Appraiser	Manager -- whoever can authorize	This must be a NetDimensions User ID. If System Configuration option "Require Direct Appraiser or Organization Approver to exist for User CSV upload" is enabled then it is required that the Direct Appraiser's User ID should already exist in the system or the non-existing Direct	None

		Appraiser has to be defined for creation in a row that is before assigning the Direct Appraiser to a user within the CSV file. If the option is disabled, then it is not required that the Direct Appraiser's User ID should already exist in the system. System will not automatically create the missing user.	
Email	E-mail Address	Valid E-mail (Max field length:150)	None
Employee Num	Employee Number	Any Text (Max field length:85)	None
EmploymentCountry Code	Contact Info - Country	Any Text (Max field length:3) Note: ISO 3166-1 alpha-3	None
ExpirationDate	Expiration Date	The following date formats are supported: dd-mm-yy (e.g. "31-12-13") dd-mm-yyyy (e.g. "31-12-2013") dd-mmm-yy (e.g. "31-dec-13") dd-mmm-yyyy (e.g. "31-dec-2013") A string of "NONE" implies no specified date. For dd-mm-yy and dd-mmm-yy formats where the year component may be ambiguous, the date is assumed to be in the past unless it results in a date that is over 80 years ago, in which case it will be assumed to be a date in the future.	None
ExternalAuthentication	External Authentication	"Y" or "N"	N
FamilyName	Surname or Last Name	Any Text (Max field length:85)	None
Gender	Gender	Any Text (Max field length:1)	None
GivenName	First Name	Any Text (Max field length:85)	None
HR Mgr	For E-mails/Approvals	Any Text (Max field length:85) Special Cases	None
HR Mgr Email	For E-mails/Approvals	Any Text (Max field length:85)	None
LanguagePref	Language	ISO 2-char codes: en, fr_CA, es_ES,...	None

ManagerName	Manager Name	Any Text (Max field length:85)	None
ManagerEmail	Manager E-mail	Any Text (Max field length:85)	None
Job Title	Title of Employee	Any Text (Max field length:85)	None
Join Date(dd-MMM-yyyy)	Date the Employee Joined the Company	<p>The following date formats are supported: None dd-mm-yy (e.g. "31-12-13") dd-mm-yyyy (e.g. "31-12-2013") dd-mmm-yy (e.g. "31-dec-13") dd-mmm-yyyy (e.g. "31-dec-2013")</p> <p>A string of "NONE" implies no specified date.</p> <p>For dd-mm-yy and dd-mmm-yy formats where the year component may be ambiguous, the date is assumed to be in the past unless it results in a date that is over 80 years ago, in which case it will be assumed to be a date in the future.</p>	None
Location Code	Location Code	Any Text (Max field length:85)	None
MiddleName	Middle Name	Any Text (Max field length:85)	None
Mobile	Contact Info - Mobile	Any Text (Max field length:85)	None
OtherName	Other Name	Any Text (Max field length:85)	None
Password	NetDimensions Talent Suite Native Password	<p>Any string that meets the system-configured password security requirements</p> <p>Use the "*GENERATE*" value for a system-generated password to be included in the New Welcome User email for a newly created user.</p>	None
Personal Title	Title of the Person (Mr., Mrs., Dr. ...)	Any of Currently Defined Titles	None
Phone	Phone Number	Any Text (Max field length:85)	None

PostalCode	Contact Info - Postal Code/ZIP	Any Text (Max field length:50)	None
Province State	Contact Info - Province/State	Any Text (Max field length:50)	None
Skin	Skin	Skin Name	System Default
Status	Status of User (Either Active, Suspended or Closed)	Must be "Active", "Suspend", or "Close" (not case sensitive)	Active
TeleFax	Contact Info - Telefax	Any Text (Max field length:85)	None
TimeZone	Time Zone	Time zone ID	None
Email Forwarding	E-mail Forwarding	Must be "N", "D", "H", "O", "E" (N/A, Direct Appraiser, HR Manager e-mail, Organization Approver, E-mail address as entered below)	N
Forwarding Email Address	Alternative Mail	Valid E-mail (Max field length:150)	None
User Option 1	User Option 1	Any Text (Max field length:100)	None
User Option 2	User Option 2	Any Text (Max field length:100)	None
User Option 3	User Option 3	Any Text (Max field length:100)	None
UserRole	User Role ID	Any Text (Max field length:85)	None
AdditionalRoles	Additional Roles	A list of Role IDs separated by a space e.g. "S G M D" or just ONE letter e.g. "S". This column is ignored if the System Configuration option 'Allow additional roles' is disabled.	None
UserAttr1	User-Defined Attribute 1	If configured as drop-down boxes, value should be user attribute code, max field length:85. Otherwise, max field length: 1,000	None

UserAttr2	User-Defined Attribute 2	If configured as drop-down boxes, value should be user attribute code, max field length:85. Otherwise, max field length: 1,000	None
UserAttr3	User-Defined Attribute 3	If configured as drop-down boxes, value should be user attribute code, max field length:85. Otherwise, max field length: 1,000	None
UserAttr4	User-Defined Attribute 4	If configured as drop-down boxes, value should be user attribute code, max field length:85. Otherwise, max field length: 1,000	None
UserAttr5	User-Defined Attribute 5	If configured as drop-down boxes, value should be user attribute code, max field length:85. Otherwise, max field length: 1,000	None
UserAttr6	User-Defined Attribute 6	If configured as drop-down boxes, value should be user attribute code, max field length:85. Otherwise, max field length: 1,000	None
UserAttr7	User-Defined Attribute 7	If configured as drop-down boxes, value should be user attribute code, max field length:85. Otherwise, max field length: 1,000	None
UserAttr8	User-Defined Attribute 8	If configured as drop-down boxes, value should be user attribute code, max field length:85. Otherwise, max field length: 1,000	None
	User-Defined Attribute Extension (if there are any)	Any Text (Max field length:85)	None
initialURL	First Screen	Screen ID must be a number (Home - 0, Learn - 2, Current Modules - 3, Enrollment Approval - 10, Manage - 11, Learning Path - 12, Catalog Browser - 13, Catalog Search - 14, Records/Transcript - 15, Career Center Summary - 16, Dashboard - 17, Review - 18, Session Administration - 19)	System Default

NewUserId	NetDimensions User ID	A Unique ID That Conforms to NetDimensions ID constraints	None
Content Server	Content Server Name	Value should correspond to a Content Server Name	No content server
Supervised Groups	User groups supervised by the User	User group names separated by vertical bars, e.g., group1 group2 group3	None
Supervised Organizations	Supervised Organizations	Full organization hierarchy to be supervised by the user in question with level codes separated by forward slash, use vertical bar to separate between multiple hierarchies, e.g., ROOT/level1org/level2org ROOT/level2org/level3org	None
User Profile Account	User Profile Account	"Y" or "N"	N
JobProfiles	Job Profiles	A list of job profile reference codes, separated by vertical bars, e.g., ENGINEER IT_CONSULTANT	None
User Group	User Groups where User is specifically identified as a member	A list of User Group Names, separated by vertical bars, e.g., group1 group2 group3	None
SendResetPasswordMail	Reset Password with System-Generated Password	<p>"Y" or "N"</p> <p>Reset password on an existing user using a system-generated password to be included in the New Password email. This is applicable for Update action and any Password value defined is ignored.</p> <p>Ensure that it's an one-time update on an existing user instead of a recurring user update job.</p>	N
Level1Code	Org Hierarchy Level 1 Code	Any Text (Max field length:85)	Unassigned

Level1Desc	Org Hierarchy Level 1 Description	Any Text (Max field length:85)	None
Level1ApproverID	Organization Level 1 Approver	It is required that the User ID already exists in the system. If not, the non-existing Approver has to be defined for creation in a row that is before assigning the Approver to a new organization within the CSV file.	None
Level2Code	Org Hierarchy Level 2 Code	Any Text (Max field length:85)	Unassigned
Level2Desc	Org Hierarchy Level 2 Description	Any Text (Max field length:85)	None
Level2ApproverID	Organization Level 2 Approver	It is required that the User ID already exists in the system. If not, the non-existing Approver has to be defined for creation in a row that is before assigning the Approver to a new organization within the CSV file.	None
Level3Code	Org Hierarchy Level 3 Code	Any Text (Max field length:85)	Unassigned
Level3Desc	Org Hierarchy Level 3 Description	Any Text (Max field length:85)	None
Level3ApproverID	Organization Level 3 Approver	It is required that the User ID already exists in the system. If not, the non-existing Approver has to be defined for creation in a row that is before assigning the Approver to a new organization within the CSV file.	None
Level4Code	Org Hierarchy Level 4 Code	Any Text (Max field length:85)	Unassigned

Level4Desc	Org Hierarchy Level 4 Description	Any Text (Max field length:85)	None
Level4ApproverID	Organization Level 4 Approver	It is required that the User ID already exists in the system. If not, the non-existing Approver has to be defined for creation in a row that is before assigning the Approver to a new organization within the CSV file.	None
Level5Code	Org Hierarchy Level 5 Code	Any Text (Max field length:85)	Unassigned
Level5Desc	Org Hierarchy Level 5 Description	Any Text (Max field length:85)	None
Level5ApproverID	Organization Level 5 Approver	It is required that the User ID already exists in the system. If not, the non-existing Approver has to be defined for creation in a row that is before assigning the Approver to a new organization within the CSV file.	None