Creating New User Accounts

Administration · https://www.easyterritory.com/documentation/territory-designer/administration/bulk-user-upload/

Summary

EasyTerritory accounts can now be created quickly and easily with our new Bulk User Upload template. This feature allows administrators to upload a CSV containing name, email, login credentials and account attributes to EasyTerritory to create the accounts automatically taking into account license quotas for Full and Mobile-Only users. This is a crucial ability for any organization hoping to implement Managed Project Support, where assigning ownership of regions to managers is only possible if the manager's accounts already exist.

Below are instructions to walk you through populating the Bulk User Upload template, using the Upload Dialog to import the template, and reviewing the resulting accounts.

Instructions

First, use the link below to download the Bulk User Upload template. This will be the structured CSV spreadsheet that can be populated with the account details.

Bulk User Upload Template CSV

https://downloads.www.easyterritory.com/latest/EZT%20Bulk%20User%20Upload%20Template.zip

Fill out the columns in the spreadsheet with the appropriate information being careful to **maintain the header row and adhere to the provided format** so that EasyTerritory can interpret each column. The flag columns shown below will default to FALSE if they are not assigned in the CSV.

- **Is Admin?:** user can access the Admin Panel, view and overwrite all projects, create, edit, and delete all user accounts
- **Is Disabled?:** user can no longer login, view or modify projects, or request password reset
- **Is Mobile?:** user has access to Mobile View version of EasyTerritory from mobile device or desktop, no access to Shape Editor Panel, project save, can only view projects and data uploaded and saved by Full user accounts

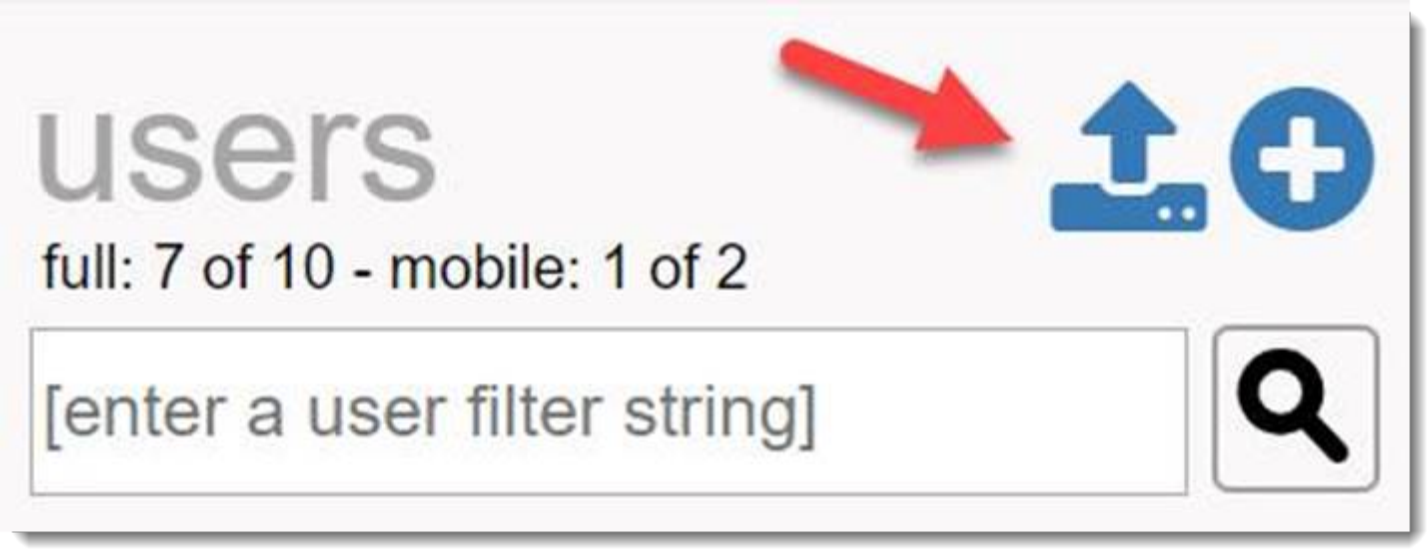
- **Is CRM Writer?:** user can write data from projects in EasyTerritory to Dynamics 365 based on configurations in Admin Settings Panel

If an identity provider is not being used (i.e. OKTA or ADFS) then a password must be provided for each account (minimum 8 characters, one capital letter, one lower case letter, and one number).

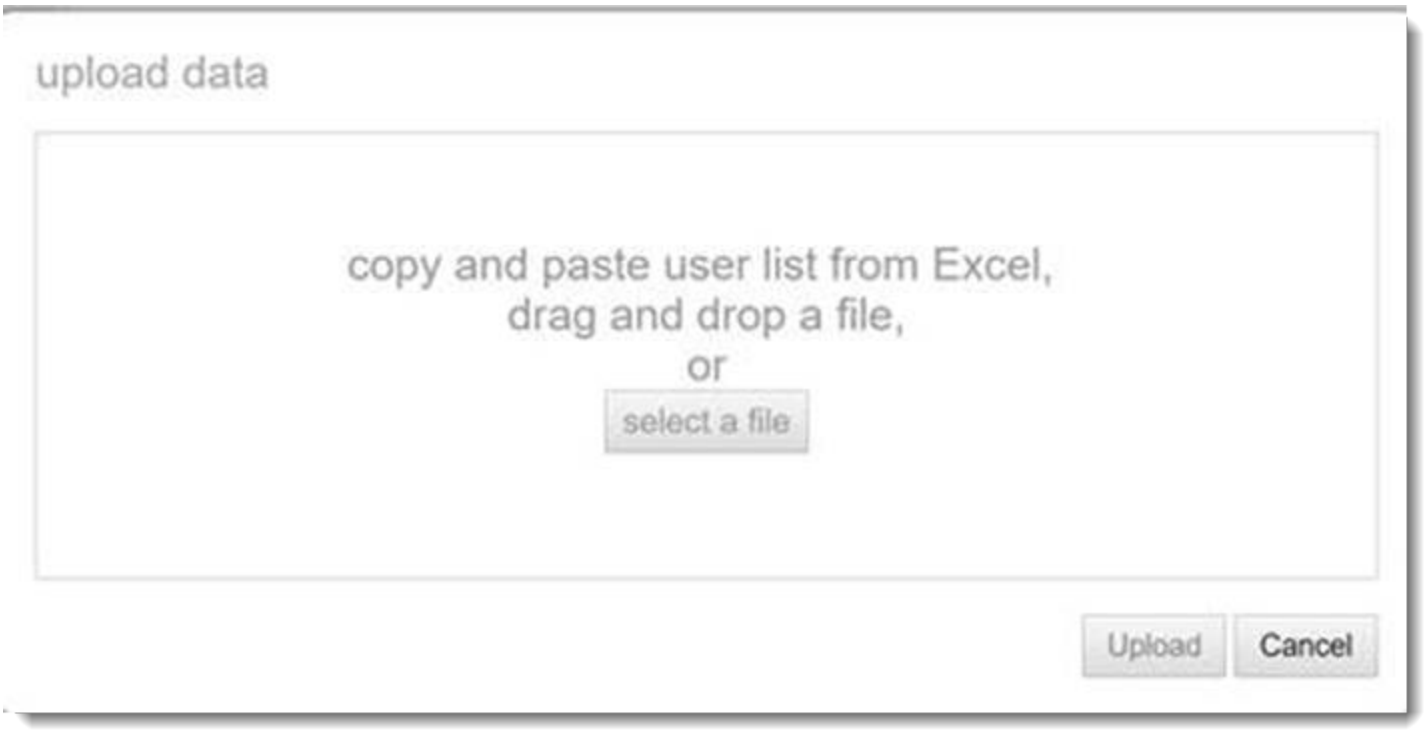
Username	First Name	Last Name	Email	Password	Is Admin	Is Disabled	Is Mobile	Is Crm Writer
bob.smith@abc.com	Bob	Smith	bob.smith@abc.com	Temp123	FALSE	FALSE	FALSE	FALSE
john.doe@abc.com	John	Doe	john.doe@abc.com	Temp456	FALSE	FALSE	TRUE	FALSE

The number of licensed accounts is set in the EasyTerritory configuration files. If this number is exceeded in the CSV upload remaining accounts will be skipped, along with any row in the spreadsheet missing a username and email address.

Once the CSV has been populated with the full account details use the Upload option in the EasyTerritory Admin Panel under the Users tab.



Use the Upload Dialog to copy/paste the cells from the CSV (including column headers), drag and drop the file, or browse to the saved location.



Review the new accounts and be sure to distribute login credentials securely.

For questions, contact Support@EasyTerritory.com.