

## Organization Administrators

### CREATING NEW USERS (BULK USERS)

Org Admins can conveniently create multiple new users using the bulk uploading tool. They can also assign and modify Observer-Learner relationships, rubrics, and schools in bulk using the user management tools.

#### Helpful Hint:

Only Org Admins with no school affiliations can create users in bulk.

Prior to the bulk upload, you must create a User Information Template that includes all of the required user data needed to create accounts. To learn more about creating a User Information Template, please see the article, [Creating the User Information Template](#).

To access the bulk user creation tools:

1. From the User Management screen, click *Manage and create users in bulk* to open the bulk uploading tools.
2. In the Bulk User Management Tools screen, click the *Create New Users* tab (see image below).

The Create New Users screen guides you through the four step process of uploading your user lists. Some things to remember when working in the New Users screen:

- You must click *Next Step* to progress to the next screen.
- To edit a previously completed step, click its numbered icon. Data in subsequent steps is preserved.

Bulk User Management Tools

Update Existing User **Create New Users**

1 School Affiliations 2 User Information 3 Passwords and Notifications 4 Review and Upload

Select the school(s) for which you are creating users.  
Users will be automatically assigned to the selected school(s).  
If you do not select any schools, users will be created without school affiliations.

Select school(s)

Return to full user list

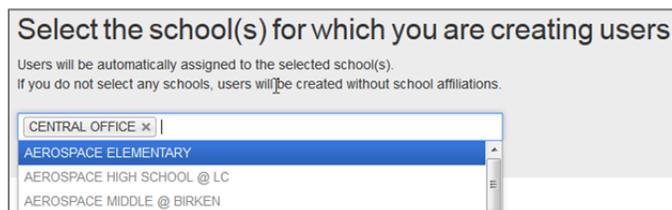
Next step

Create New users (Bulk) screen

## Step 1 – School Affiliations

If desired, you may assign uploaded users to a school or schools. All listed users are assigned to the selected school(s). If you do not wish to make a school assignment, just leave the field blank. School assignments can be modified or added after users are uploaded.

1. Click in the selection field to view a list of schools.
2. Click a school to select it.
3. To add more schools, click in the field and make additional selections.



4. To remove a school selection, click in the upper right corner of the school tile.



5. Click *Next step*.

## Step 2 – User Information

The bulk uploader requires a core set of data, presented in a CSV (comma separated values) or Excel file for uploading. User data must be presented in a specific order and format to be read properly by the software. You can download a blank User Information Template and/or a Data Guide that defines the values accepted by the system.

1. When your User Information Template is ready, click *Select and upload your User Information Template*.
2. Browse for and open the template.
3. Click *Next step*.



### Helpful Hint:

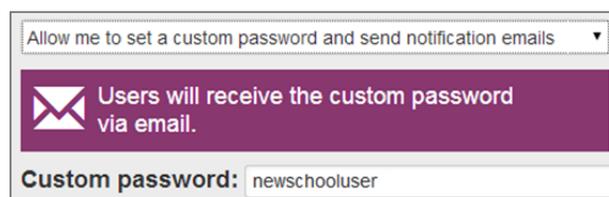
Data errors in templates are not identified until after step four. If there are errors, a data error sheet is generated and available for download at the end.

## Step 3 – Passwords and Notifications

Choose a temporary password type and a distribution method so users can sign into their accounts for the first time. Choose among options that allow the system to email either a single, custom password or randomly generated passwords to users. A third option permits you to create a custom password and distribute it to users via an outside method.

Each option provides an explanatory notice when you select it.

1. Click the selection field to view options.
2. Select an option. If you choose to create a custom password, a second field displays to enter the password.
3. Click *Next step*.



Password option – explanatory notice

## Step 4 - Review and Create

The last step allows you to review your actions in the previous three steps and then submit your user account data. Once you click submit, account creation cannot be undone.

If you wish to edit a previous action, just click its numbered icon to return to the step. After you make changes, remember to click Next step to move to the next step.

Also, use the review screen to make note of the data you submitted. You may wish to take a screenshot. If, for example, you created a custom password, make sure you record it somewhere. Passwords must be reset individually.

1. Review the information on the screen.
2. If needed, return to step(s) to make modifications.
3. Record or make note of the data you submitted.
4. Click *Create Accounts!*

<b>You are about to create new user accounts.</b>	
Please review this information carefully. Account creation cannot be undone.	
Accounts will be associated with the following schools:	CENTRAL OFFICE
You have submitted user information in the following template:	Bulk User Information Template(1).xls
The temporary password for these account will be:	[auto-generated random password]
Users will be notified of their login credentials via:	an auto-generated email notification

*Summary review screen*

### Helpful Hint:

*If there are template errors, a notification displays, along with an error document (spreadsheet) you can download to review the data issues. Errors are highlighted in pink. You may correct the errors within the document and re-upload, if desired.*