



## Registry Tip

# Updating Existing User Information with CSV Batch Upload

| Release/Revision Date | Location of Change in this Document                           | Comment                                                                                                                            |
|-----------------------|---------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| June 01/09            | Complete Rewrite of Tip                                       | This tip has been rewritten to reflect the current CSV process related to updating Roles and Facilities for <b>Existing</b> Users. |
| Aug 15, 2008          | Linked CSV Sample Document                                    | Users must include Country Code in CSV file or file will be rejected.                                                              |
| July 10, 2008         | Purpose and New Section – BA User by Role and Facility Report | Updates regarding using the BA user by role and facility report<br>Moved from Alert to Tip                                         |
| January 5, 2007       |                                                               | Initial Release                                                                                                                    |

**Audience:** User Security Administrators

**Purpose:** This tip informs User Security Administrators (USAs) of the current functionality to allow the USA to use a CSV file for uploading changes to existing user information.

**Key Principles:** Using the Batch upload functionality on the USA menu, USA's can use a CSV file upload to update **existing** user information, including BA designate relationship information. (Note: this functionality does not include **new** User ID and **new** password). This is especially useful for companies where there are numerous changes to staff assignments.

- o Using the following CSV file format, the USA fills in the appropriate columns to reflect the required changes.

|   | A    | B    | C        | D       | E               | F            | G                | H                  | I            | J         | K                |
|---|------|------|----------|---------|-----------------|--------------|------------------|--------------------|--------------|-----------|------------------|
| 1 | VERB | NOUN | REVISION | User ID | User First Name | User Surname | User Second Name | Phone Country Code | Phone Number | Phone Ext | Fax Country Code |
| 2 |      |      |          |         |                 |              |                  |                    |              |           |                  |
| 3 |      |      |          |         |                 |              |                  |                    |              |           |                  |
| 4 |      |      |          |         |                 |              |                  |                    |              |           |                  |
| 5 |      |      |          |         |                 |              |                  |                    |              |           |                  |

|   | L          | M       | N     | O                        | P                        | Q             | R           | S              | T    | U                   |
|---|------------|---------|-------|--------------------------|--------------------------|---------------|-------------|----------------|------|---------------------|
| 1 | Fax Number | Fax Ext | Email | Confidential Access Flag | Experimental Access Flag | Mail Override | Active User | User Role Name | BAID | Facility Identifier |
| 2 |            |         |       |                          |                          |               |             |                |      |                     |
| 3 |            |         |       |                          |                          |               |             |                |      |                     |
| 4 |            |         |       |                          |                          |               |             |                |      |                     |
| 5 |            |         |       |                          |                          |               |             |                |      |                     |



- **Important: Due to the changes to the format file for this upload that will be made on June 3<sup>rd</sup>, any previously saved formats prior to this date will be rejected by the Registry. Please ensure that you use this new format noted above after June 3<sup>rd</sup>.**
- The specification and template documents are available on the Registry Resource Centre under:
  - Registry Job Aids – Job Aid – BA User Spreadsheet Upload Specifications
  - Registry Resource Centre – Registry Job Aids – Job Aid – BA User Spreadsheet Templates

**BA User by Role & Facility Report:** The BA User by Role & Facility Report in CSV format can be easily manipulated to create your User upload file.

To use a CSV report received from the Registry, you must:

- Delete the **Facility Name** and **Last Login Date** columns
- Add three 3 columns to the beginning of the data.
  - Column A = VERB - each row would be Change
  - Column B = NOUN - each row would be User
  - Column C = REVISION - each row would be 001

Cut, paste and update the appropriate data. The saved CSV format file with the changes can be uploaded to the Registry.

Note: Additional assistance with this process is available in the Registry Resource Centre Training Module 2.3 – *Manage User ID and Access*.

**More information:**

Please contact the Registry Service Desk.

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