

Updating Existing User Information with CSV Batch Upload

Jurisdiction	Release/Revision Date	Location of Change in this Document	Comment
AB/SK/BC/MB	June 29, 2023		There are no changes to the intent of this tip, updated to reflect current state
	Jun 1, 2009	Complete rewrite of tip	This tip has been rewritten to reflect the current CSV process related to updating Roles and Facilities for Existing Users
	August 15, 2008	Linked CSV Sample Document	Users must include Country Code in CSV files 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. Moved from Alert to Tip.
	January 5, 2007		Initial Release

Audience: User Security Administrators and Backup User Security Administrators (USA's)

Purpose: This tip reminds USA's of the functionality to use a CSV file to upload changes to existing user information.

Key Principles:

Using the batch upload functionality on the Admin Functions menu, USA's can use a CSV file upload to update **existing** user information, including BA designate relationship information. This is especially useful for companies where there are numerous changes to staff assignments.

Note: this functionality does not include **new** User ID and **new** password setups).

A copy of the BA User CSV Spreadsheet Upload Specifications and Templates are available on the [Petrinex Website – Learning Centre – Job Aids – Spreadsheet CSV Upload Specifications and Templates – All Jurisdictions – Business Associate User](#).

Using the CSV template 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										



The **BA User by Role and Facility Report** can be easily manipulated to create your BA User upload file. After requesting the BA User by Role and Facility report in a CSV format from the Admin Functions – Data Submission and Reports – Submit Report Request menu you will have to:

- Delete the **Facility Name, Password Changed Date** 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 and paste this information into the CSV template document and make any required data updates.
- The saved CSV format file with the BA user information can then be uploaded using the Admin Functions – Data Submission and Reports - Upload Report Request menu.

More information:

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