

Importing Users into JamAngle

You can batch import your users into JamAngle. This is a fast way to create many user accounts instead of creating each account individually in the system. For this function, we recommend a spreadsheet tool that can help you create the correct data format in a CSV (Comma Separated Values) file. Your file can be imported by JamAngle from any folder location you select.

Import Users

For JamAngle to successfully import your users, the following data rules are necessary.

- Listed are the data fields (columns) required. You must also include the column headers (once only at the top of each column) as per the order listed below:
 - Column Headers: first_name, last_name, email_id, department

The fields with maximum field lengths are:

- **first_name** (max of 50 characters)
 - **last_name** (max of 50 characters)
 - **email_id** (max of 50 characters)
 - **department** (max of 50 characters)
- NOTE: If a department has not been created in JamAngle, it will be automatically created during the import process. In this regard, keep your department naming consistent to avoid unwanted duplication.
 - NOTE: Every user that is imported is assigned the "Hive/Tribe User" role by default. After a successful import, you can edit the Role of a specific user within JamAngle.
 - NOTE: JamAngle does allow you to deactivate a user, a benefit that gives -1 to your overall user count while still retaining a user's details. All imported users are assigned an Active status making their accounts valid for use immediately. You can disable a user within JamAngle after a successful import.
- Once your users are successfully imported, JamAngle will automatically send each user an email invite using the email addresses you have specified in the import. When a user receives this email, they will need to click on the invite link to join your company on JamAngle. Once directed via this link, the user will:
 - Create their personal password



Thereafter, they can log in to JamAngle as follows:

- Input the company domain (as provided in the email)
- Input their email address and personal password created

Note: Should a user not have received this email invite, there is a “resend invitation” in the user management.

IMPORTANT NOTE

Please check the number of users in your user data file vs. your current Subscription Plan. If you have more users in your CSV file, JamAngle will only import the number of user accounts allowed by your Plan. Users are imported according to their record position in your CSV file. The balance of the users in your data file will not be imported. In this regard, either remove the users you do not require, or upgrade your Subscription Plan to accommodate the number of users you wish to import.

WARNING MESSAGES

You may receive warning messages under the following circumstances (note: the exact message is not shown here):

- User import exceeds the number of users for your current Subscription Plan. Solution provided under “Important Note”.
- You may have the incorrect column headers in your CSV file. Please correct according to the guides in this help.
- A user already exists. Every user Email ID (address) must be unique. There is no further action required by you, the user will be skipped during the import.
- Incorrect file or column-layout format. Please correct according to the guides in this help.

