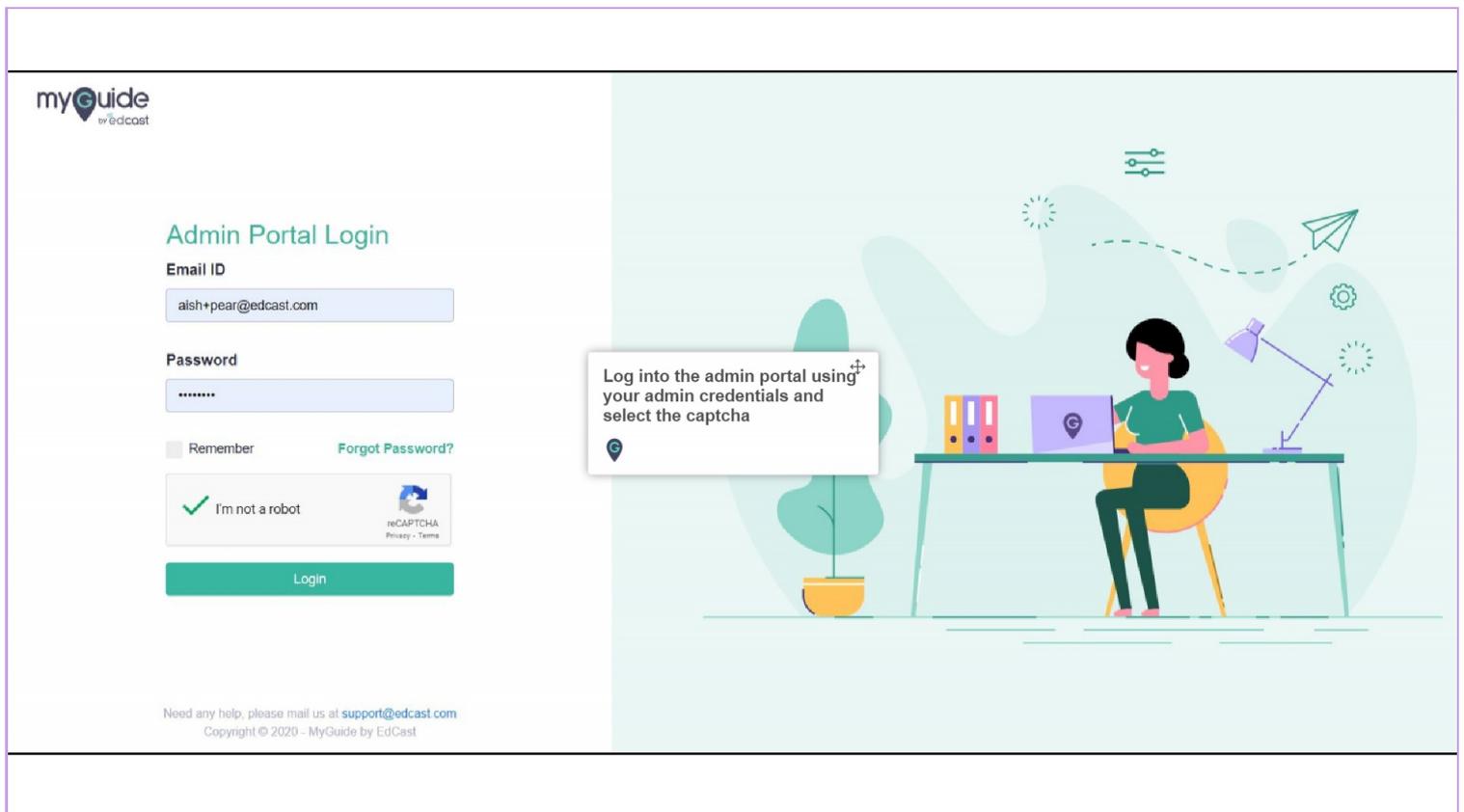




How to add multiple users at once through bulk import

Step: 01

Log into the admin portal using your admin credentials and select the captcha



myGuide
by edcast

Admin Portal Login

Email ID

Password

Remember [Forgot Password?](#)

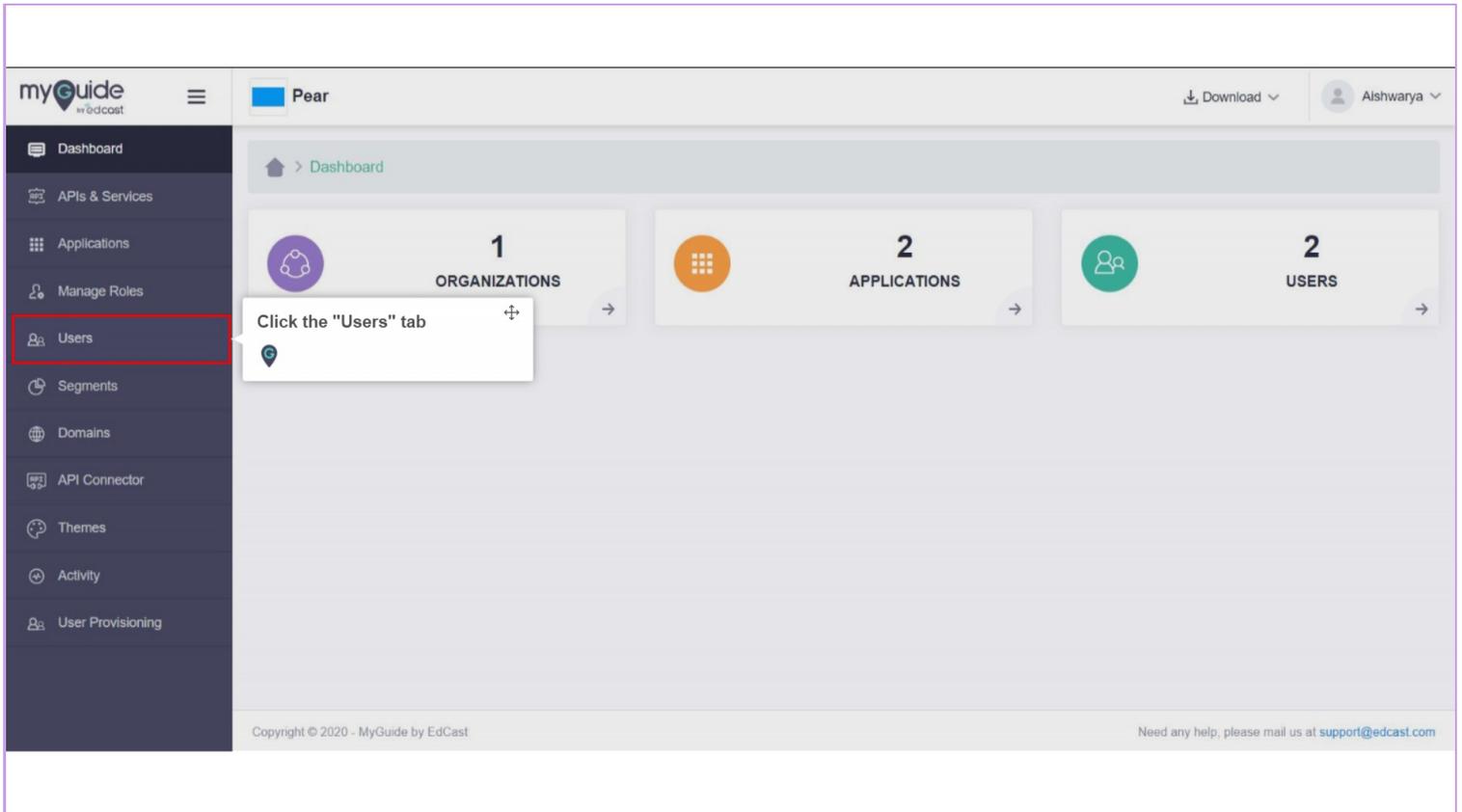
I'm not a robot  reCAPTCHA
Privacy - Terms

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Log into the admin portal using your admin credentials and select the captcha

Step: 02

1) Click the "Users" tab



The screenshot displays the myGuide by edcast dashboard interface. The top navigation bar includes the myGuide by edcast logo, a hamburger menu icon, the name 'Pear', a 'Download' button, and a user profile icon for 'Alshwarya'. The left sidebar contains a list of navigation items: Dashboard, APIs & Services, Applications, Manage Roles, Users (highlighted with a red box), Segments, Domains, API Connector, Themes, Activity, and User Provisioning. The main content area shows a breadcrumb 'Dashboard' and three summary cards: '1 ORGANIZATIONS', '2 APPLICATIONS', and '2 USERS'. A white callout box with a pointer icon is positioned over the 'Users' card, containing the text 'Click the "Users" tab' and a location pin icon. The footer contains the copyright notice 'Copyright © 2020 - MyGuide by EdCast' and the support email 'support@edcast.com'.

Step: 03

1) Click on "Import User"

The screenshot shows the 'myGuide by EdCast' interface. The left sidebar contains navigation options: Dashboard, APIs & Services, Applications, Manage Roles, Users (selected), Segments, Domains, API Connector, Themes, Activity, and User Provisioning. The main content area is titled 'Pear' and shows a 'Users' management page. At the top right, there are 'Download' and 'Aishwarya' user profile options. Below the header, there is a search bar and two buttons: 'Add User' and 'Import User'. The 'Import User' button is highlighted with a red border. A tooltip with the text 'Click on "Import User"' points to this button. Below the buttons is a table with columns: Avatar, First Name, Last Name, Email ID, Status, Guide Role, and Organization. One user is listed: Aishwarya Karanjkar with email aish+pear@edcast.com, status Active, and role Administrator. The footer contains copyright information and a support email address.

Avatar	First Name	Last Name	Email ID	Status	Guide Role	Organization
	Aishwarya	Karanjkar	aish+pear@edcast.com	Active	Administrator	Unas

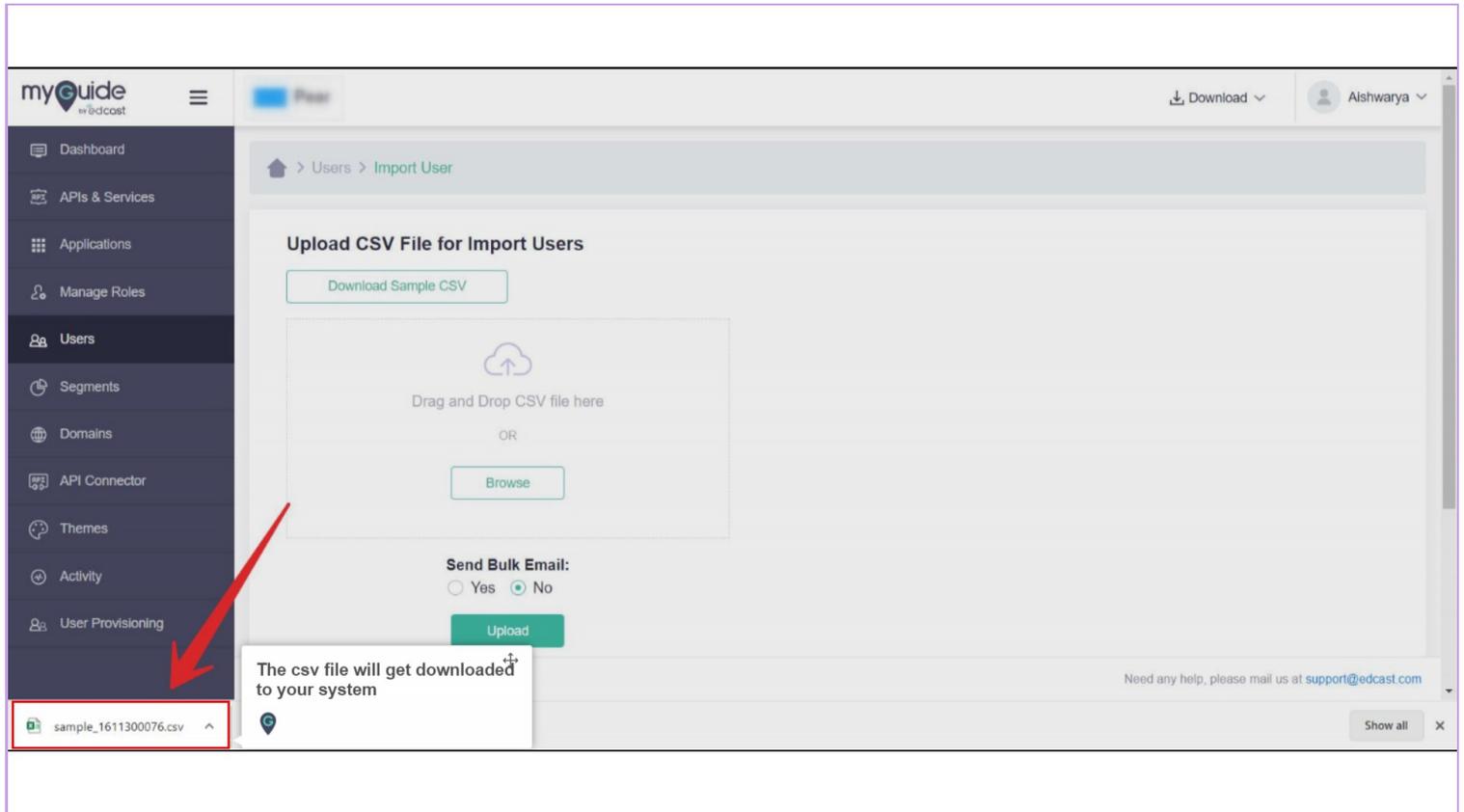
Step: 04

1) Click the "Download Sample CSV" button

The screenshot shows the 'myGuide by EdCast' web interface. The top navigation bar includes the logo, a user profile for 'Pear', and a 'Download' dropdown. The left sidebar menu lists various system components, with 'Users' currently selected. The main content area is titled 'Import User' and features a 'Download Sample CSV' button highlighted with a red border. A callout box with a pointer icon and the text 'Click the "Download Sample CSV" button' is positioned over this button. Below the button is a large dashed box for file upload, containing a cloud icon, the text 'Drag and Drop CSV file here', and a 'Browse' button. At the bottom of the main area, there is a 'Send Bulk Email:' section with radio buttons for 'Yes' and 'No' (the 'No' option is selected), and an 'Upload' button. The footer contains copyright information and a support email address.

Step: 05

1) The csv file will get downloaded to your system

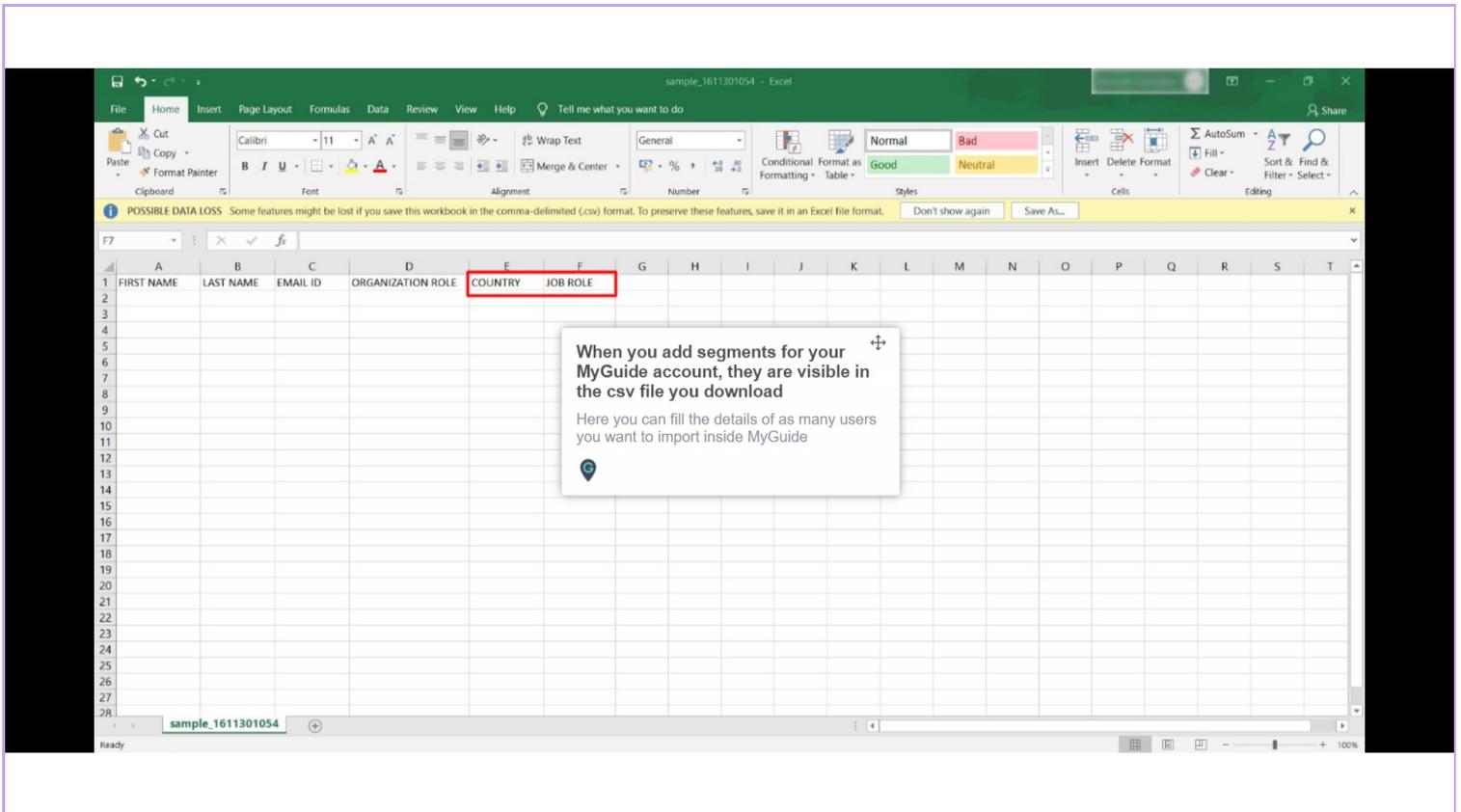


The screenshot displays the 'myGuide by edcast' interface. The left sidebar contains a navigation menu with items: Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, and User Provisioning. The 'Users' menu item is highlighted. The main content area is titled 'Import User' and features a section for 'Upload CSV File for Import Users'. This section includes a 'Download Sample CSV' button, a drag-and-drop area with a cloud icon and the text 'Drag and Drop CSV file here', and a 'Browse' button. Below this is a 'Send Bulk Email' section with radio buttons for 'Yes' and 'No' (selected), and an 'Upload' button. A red arrow points from the 'Download Sample CSV' button to a file named 'sample_1611300076.csv' in the file explorer. A tooltip above the file name states: 'The csv file will get downloaded to your system'. The top right of the interface shows a 'Download' button and a user profile for 'Aishwarya'.

Step: 06

When you add segments for your MyGuide account, they are visible in the csv file you download

Here you can fill the details of as many users you want to import inside MyGuide



Step: 07

Make sure the entries you fill for the segments in this csv should match the values you have added inside the admin portal

This is important because MyGuide will segregate the users based on these segment values

Make sure the entries you fill for the segments in this csv should match the values you have added inside the admin portal

This is important because MyGuide will segregate the users based on these segment values

	A	B	C	D	E	F	G	H	I	J
1	FIRST NAME	LAST NAME	EMAIL ID	ORGANIZATION ROLE	COUNTRY	JOB ROLE				
2	username	lastname	username@	Role 1	Australia	developer				
3										
4										

Step: 08

1) After saving your csv file, you need to upload it to the admin portal. Click on "Browse" and select your file

myGuide by edcast

Pear

Download

Aishwarya

Users > Import User

Upload CSV File for Import Users

Download Sample CSV

Drag and Drop CSV file here

OR

Browse

Send Bulk Email:
 Yes No

Upload

After saving your csv file, you need to upload it to the admin portal. Click on "Browse" and select your file

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Step: 09

- 1) Otherwise, select "No" and click on "Upload" button
- 2) If you want to notify your users that they have been added to MyGuide and their user IDs, select the radio button for - Yes. This feature will send emails to the users.

The screenshot displays the 'myGuide by edcast' interface for the 'Import User' function. The main heading is 'Upload CSV File for Import Users'. A file named 'sample_1611301054.csv' is shown with a 'Browse' button. Below this, the 'Send Bulk Email' section features two radio buttons: 'Yes' and 'No', with 'No' selected. A green 'Upload' button is positioned below the radio buttons. A tooltip on the left states: 'If you want to notify your users that they have been added to MyGuide and their user IDs, select the radio button for - Yes. This feature will send emails to the users.' Another tooltip on the right says: 'Otherwise, select "No" and click on "Upload" button'. The 'Import User File History' table is empty, and a 'Refresh' button is visible. The footer includes 'Copyright © 2020 - MyGuide by EdCast' and 'Need any help, please mail us at support@edcast.com'.

Step: 10

In a short while, the users will get added. You can check the user import history for the progress.

myGuide by edcast

Dashboard

APIs & Services

Applications

Manage Roles

Users

Segments

Domains

API Connector

Themes

Activity

User Provisioning

Pear

Download

Aishwarya

sample_1611301054.csv

Browse

Send Bulk Email:

Yes No

Upload

In a short while, the users will get added. You can check the user import history for the progress.

Import User File History

Refresh

Status	Progress	Creation Date
Done	100%	Fri, Jan 22, 2021
Done	100%	Fri, Jan 22, 2021

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Step: 11

1) Go to users tab to see the details of users added

The screenshot shows the 'myGuide by EdCast' interface. The top navigation bar includes the logo, a hamburger menu, the organization name 'Pear', a 'Download' button, and the user profile 'Aishwarya'. The left sidebar lists various system components. The main area is titled 'Users' and contains a search bar and 'Add User' and 'Import User' buttons. Below these is a table of users:

First Name	Last Name	Email ID	Status	Guide Role	Organization Role	User Action
Username	Lastname	username@email.com	Active	Player	Role 1	[Action icons]
Aishwarya	Karanjkar	aish+pear@edcast.com	Active	Administrator	Unassigned	[Action icons]

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Thank you

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