



DOKEOS  
eLearning made easy



# Importing users into Dokeos LMS

## Introduction

You are building a learning programme on Dokeos LMS and now has come the time to import users in the system. We will address this need at 3 levels

1. **Level 1** : you just need to import a list of users in LMS and courses
2. **Level 2** : you need to add profiling filters to sort users through criteria like Department, Country, Position etc.
3. **Level 3** : you need to synchronize Dokeos LMS with your Human Resources Management System or Active Directory or any kind of people management system

## Level 1 : Importing a list of users in Dokeos LMS

To import users, you need a CSV file that lists your users in a series of columns and rows. Column headers will start with FirstName , LastName , Email etc. And there are strict rules to add and name these column headers that we will explain below.

### Ms-Excel, Google Sheets or LibreOffice ?

To manage users lists before you import them into Dokeos, you may rely on a Human Resources Management System, but you usually end up with an export to any kind of Excel-like format : XLS, XLSX, ODS etc.

Ms-Excel is an easy tool to play with long lists, sort the data, rename column headers, complete the missing fields etc. So is Google Sheets (part of Google Drive) or LibreOffice.

The only thing you need to keep in mind is that, at the end of the sorting-renaming-completing process, you need to export your users list as a CSV file. CSV is a plain text Comma Separated Values file. Keep in mind that Dokeos LMS accepts only ";" (semi-colon) or "," (comma) as fields separator.

You can open the same .csv file in Microsoft Excel, Google Sheets or LibreOffice, but the method to open this file properly is different on each of them. To keep it simple, I will now focus on Google Sheets as this corresponds to some of our clients configuration and works on any computer.

### Generate an empty CSV file

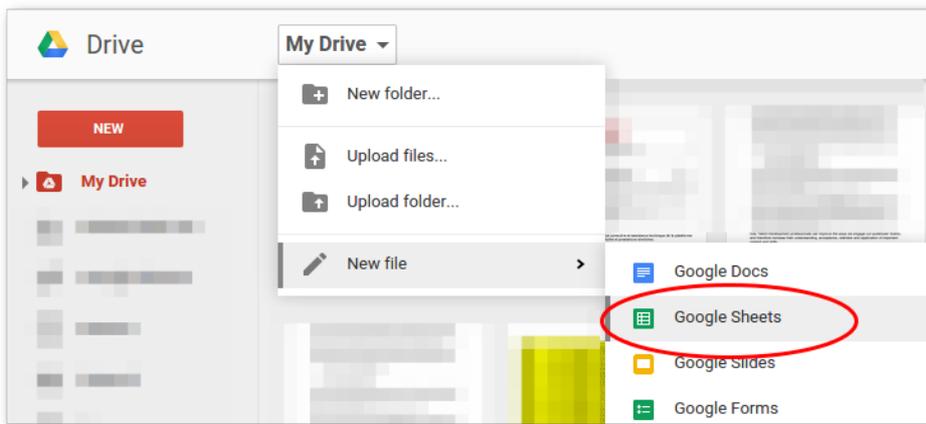
Connect to your portal with admin credentials, enter Admin Panel and click on Users > Import. Then go to the "Generate an empty CSV file" section, check all the boxes of the "RECOMMENDED" column and click on "Download CSV template". Save it in a folder somewhere, let's suppose your folder is named "UsersImport".

If you open it in a Text Editor like *Microsoft Notepad* or *Apple TextEdit*, it will look like this :

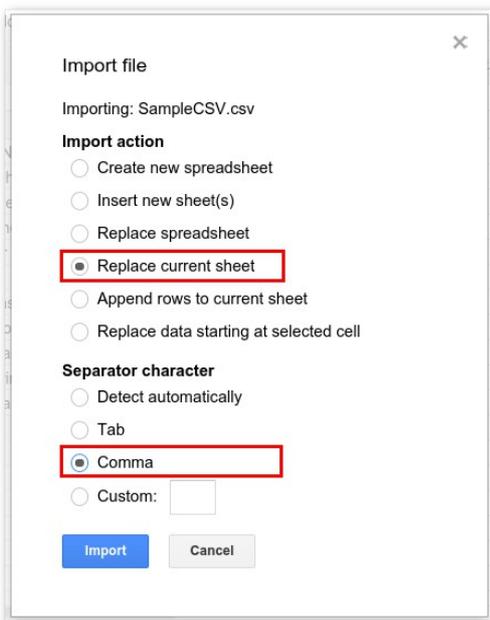
```
SampleCSV.csv x
FirstName,LastName,Email,UserName>Password,Active
Marty,MCFLY,mmcfly@mail.com,mcflym,password,1
Suzy,CUE,scue@mail.com,scue,password,1
Alan,WHITE,awhite@mail.com,awhite,password,0
```

## Import the template in Google Sheets

For some reason, Google does not allow you to open the CSV file. To edit the CSV template in Google Sheets, start with creating an empty Google Sheets on your Google Drive:



Then import the CSV file inside the Google Sheet through File > Import > Upload. You should end up with this popup. Select Replace current sheet and set Separator character to Comma, then click on Import.



Now you get your CSV example displaying properly in Google Sheets. The “,” separator has been replaced with cells in a table. Pay special attention to the column headers. Since these will be interpreted by Dokeos, any editing there will break the import. Do not replace “FirstName” with “First Name” etc.

A	B	C	D	E	F
FirstName	LastName	Email	UserName	Password	Active
Marty	MCFLY	mmcfly@mail.co	mcflym	password	1
Suzy	CUE	scue@mail.com	scue	password	1
Alan	WHITE	awhite@mail.cor	awhite	password	0

### Enter your own users list in the template

Edit your users list so as to end up with the same type of data in the same order : first name / last name / email / user name (also called Login) and Password. Set All Active to 1 unless you want to import them into the system for future use but give them no access so far.

Your Dokeos LMS license has a maximum of Active users, you can add more but all additional users must be set as Active = 0.

Do not change anything in the Headers row : FirstName | LastName etc.

You should end up with a list like this.

	A	B	C	D	E	F
1	FirstName	LastName	Email	UserName	Password	Active
2	Alison	Newhall	anewhall@mail.com	anewhall	password	1
3	Deb	Tucker	dtucker@mail.com	dtucker	password	1
4	Jen	McGhee	jmcghee@mail.com	jmcghee	password	1
5	Ryan	Fuller	rfuller@mail.com	rfuller	password	1
6	Jessica	Petti	jpetti@mail.com	jpetti	password	1
7	Taylor	Robinson	trobenson@mail.com	trobenson	password	1
8	Beth	Wilcot	bwilcot@mail.com	bwilcot	password	1
9	Anne	Shea	ashea@mail.com	ashea	password	1
10	Sinead	Pilgrim	spilgrim@mail.com	spilgrim	password	1
11	Andreas	Delta	adelta@mail.com	adelta	password	1

### Username and passwords policies

Most common options for Username (=login) is the family name or the email address.

As for passwords, you can opt for 2 common strategies

- Give a **complex password** to everyone like 72eG4f12ey32. That can prove tedious if you have a long list of users.
- Give **the same password** (like “1234”) to everyone and force them to change their password at their first connection (this option is located in Admin > Portal > Settings > Security).

Dokeos sends an email to the users when you enroll them. Ensure to deactivate this option if this is not what you are looking for. Take the necessary time to edit the Registration Email since this may be the first contact you have with some of them.

## Active and Inactive users and your pricing plan

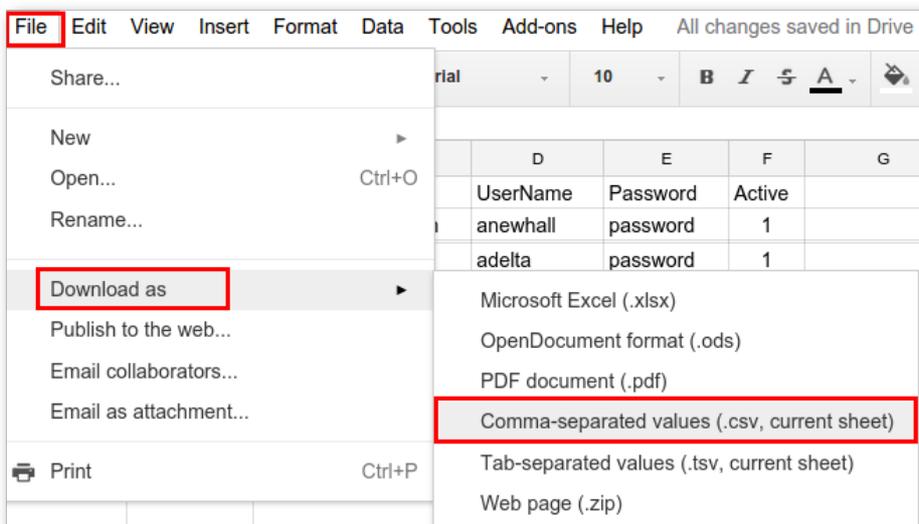
Dokeos is an all-included cloud based e-learning solution. You get a 24/7 service for an annual budget. This budget includes the software, the support, the hosting and a certain volume of users. Since you don't want to pay more than needed, you can deactivate users so that they are not taken into account for the calculation of your annual fee. The fee is calculated on your maximum of active users.

It is up to you to plan a strategy on this. A basic strategy is to upload the whole list as Inactive and activate them progressively. Another option consists in activating everyone and re-uploading the list to indicate rapidly who should be deactivated. A third strategy, connected to Dokeos SHOP and a training catalog for sale, is that anyone can self-register but they become active when payment is validated.

## Export the file as a CSV from Google Sheets

Once we are happy with the data structure (the right data in the right column), the correct counting of users, the spelling etc., we are ready to export the data as a CSV file from Google Sheets to our "ImportUsers" folder locally on the computer.

Click on File > Download as > Comma-separated values (.csv, current sheet)



You end up with a file named like "Untitled spreadsheet – Sheet1.csv" or any other name you may have given to the sheet.

## Import users in Dokeos LMS

Now it is time to be back to your Dokeos LMS portal and enter your admin credentials. Enter admin panel and select Users > Import, scroll down to the Users Import section, ensure that Send email to users is set to "no" if you don't want to inform users yet.



Import users

Browse Drag & Drop

Send email to users  Yes  No (Edit Invitation Email)

SUBMIT

If there is an error in your file, Dokeos will display an error message that indicates where the error is located. Common errors are : wrong headers syntax (First Name instead of FirstName), wrong coding of file (web files need to be UTF-8 charset) or wrong separator (the files includes FirstName TAB LastName instead of FirstName,LastName for instance). Contact Dokeos support in case of trouble. We will help you with the syntax of your CSV file.

When the import works smooth and fine, you end up in the LMS users list and you can find the added users in the list :

First Name	Last Name	Login	Email	Status	Active
Alison	Newhall	anewhall	<a href="mailto:anewhall@mail.com">anewhall@mail.com</a>	Learner	✔
Andreas	Delta	adelta	<a href="mailto:adelta@mail.com">adelta@mail.com</a>	Learner	✔
Anne	Shea	ashea	<a href="mailto:ashea@mail.com">ashea@mail.com</a>	Learner	✔
Beth	Wilcot	bwilcot	<a href="mailto:bwilcot@mail.com">bwilcot@mail.com</a>	Learner	🔒

## Level 2 : adding profile fields

You need to add users in Dokeos LMS but you also need to add filters / profiling to sort them according to your business criteria : Department, State, Country... The process is the same with two more steps :

### Create the filters

Enter Admin > Users > Import. Select ADD FILTER and start typing for instance COUNTRY and then the list of countries :



Country

USA

India

China

Proceed similarly with all required filters.

## Export the CSV template

You export the CSV template the same way but you will have selected the additional filters in the

Mandatory	Recommended	Optional	Custom
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Login	<input type="checkbox"/> Language	<input checked="" type="checkbox"/> Country
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> Password	<input type="checkbox"/> Phone number	<input checked="" type="checkbox"/> State
<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Active	<input type="checkbox"/> Status (learner/trainer)	<input checked="" type="checkbox"/> Department

[Download CSV template](#)

Import the CSV file in Google sheets like in Level 1. Complete the columns with data, including the 3 additional columns : Country, State, Department. And proceed similarly to exporting the file to CSV then importing it into Dokeos.

You have now added profiling into your users list and you can use these profiling fields as filters to enroll people into courses, programs etc.

## Level 3 : Connecting Dokeos to your HRMS or Active Directory

Dokeos connects with most HRMS of the market. Contact Dokeos support. Corporate SLA includes HTTPS security, connection to your HRMS, AD-connection and/or SSO.

## Need help?

Contact Dokeos support on [support@dokeos.com](mailto:support@dokeos.com) and <https://support.dokeos.com> . Depending on your SLA, the Dokeos support team will answer you as soon as possible.

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