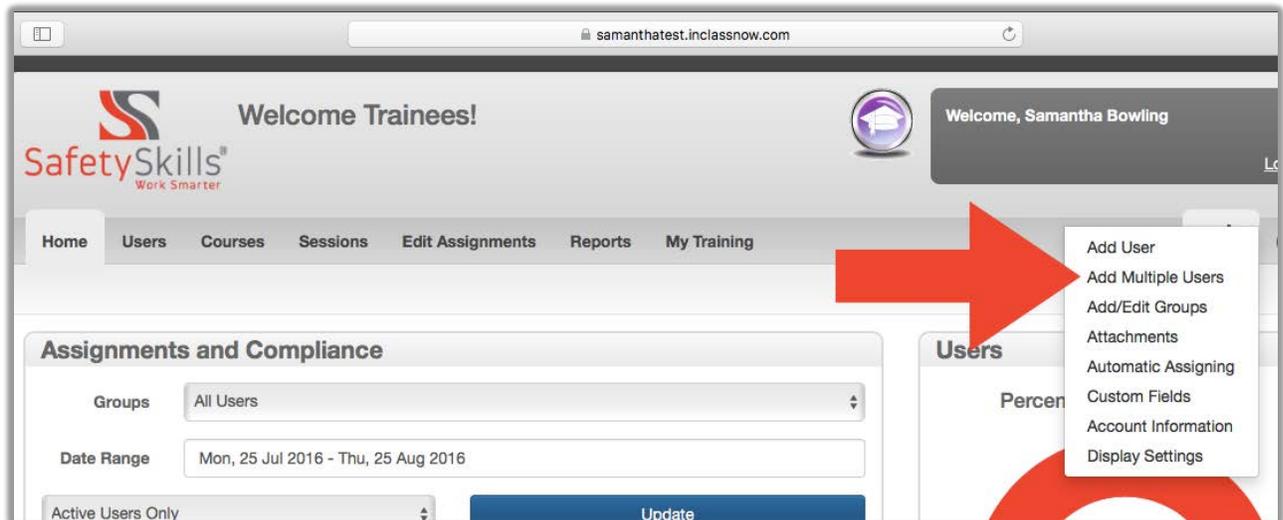


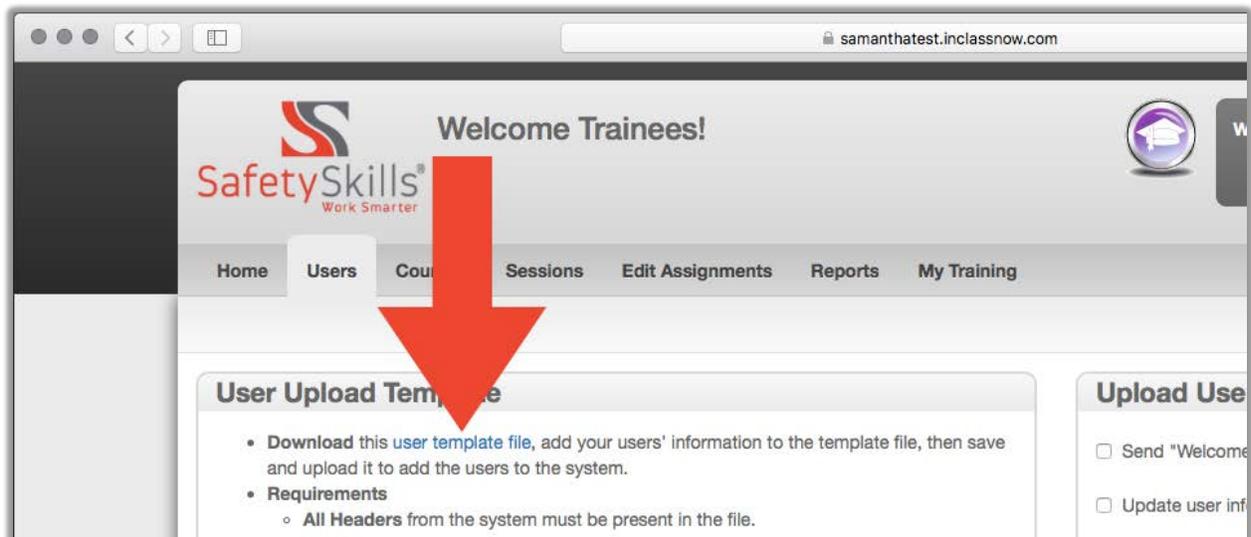
How to Create or Edit User Lists in Numbers

How to Download the Template

To get started, click on the "Configure" tab (looks like two gears on the upper right of the LMS) and select "Add Multiple Users" from the drop down menu.

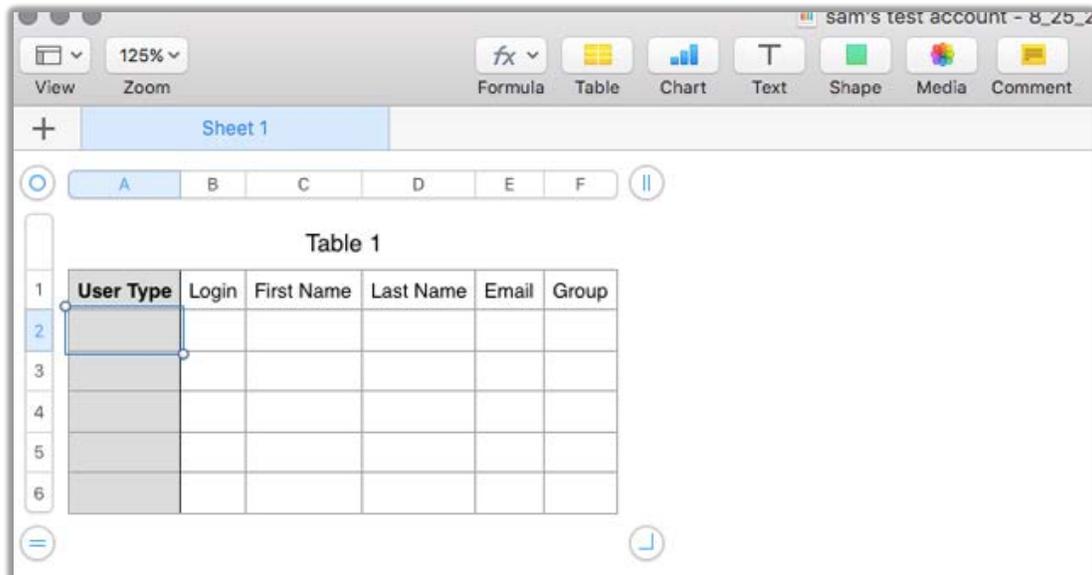
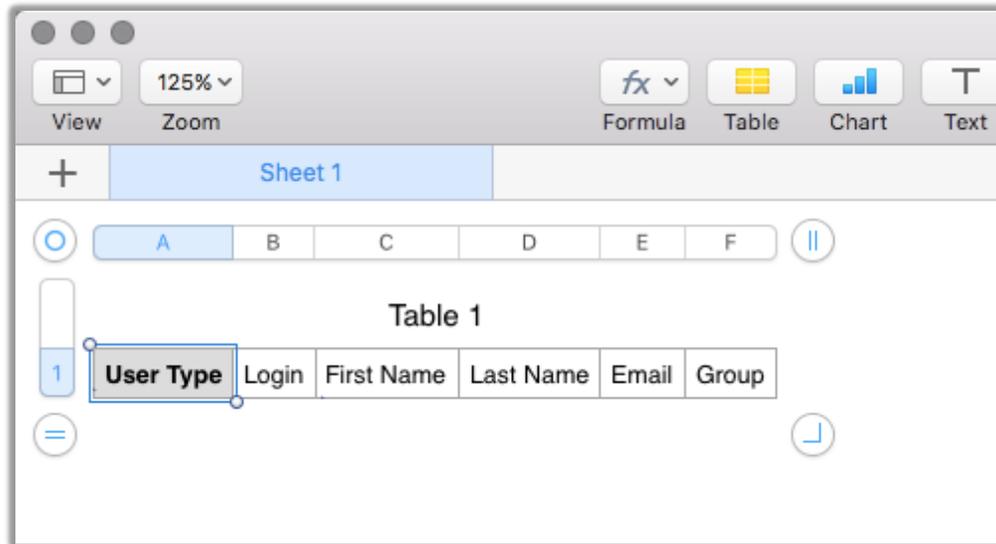


On the left side of the screen, you will see the blue link to download the "user template file," this file, like all other default exports from the LMS, will export a Comma Delimited, CSV file. You will use this template to upload multiple users to your account.



Filling Out the User Template

When you open the blank “user template file” in Numbers you will see only the column headers. You must add rows to begin entering data to the file.



The user template file will contain all of the headers that exist in the account at the time you export the file. These headers **must be present** to successfully upload the file and add users. If you have additional “Custom Fields,” these will also be on the template. If you would like to utilize additional fields, the “Owner” of the account can add “Custom Fields”. As long as the column headers on the import file match the fields in the LMS **exactly**, the sheet will upload without errors.

You **must** fill out columns A through D (user type, login, first name, last name). The other columns pertain to creating and managing groups and custom fields for your users. To learn more about that process, you can go [here](#) and [here](#).

User Type:

There are three available user types to choose from. You **must** use one of these three:

- Super Administrator: Able to view, assign, and run reports on all users in the system
- Administrator: May be granted access to certain groups; able to view, assign, and run reports only for users in those groups
- Learner: Only able to view and take training assigned to them

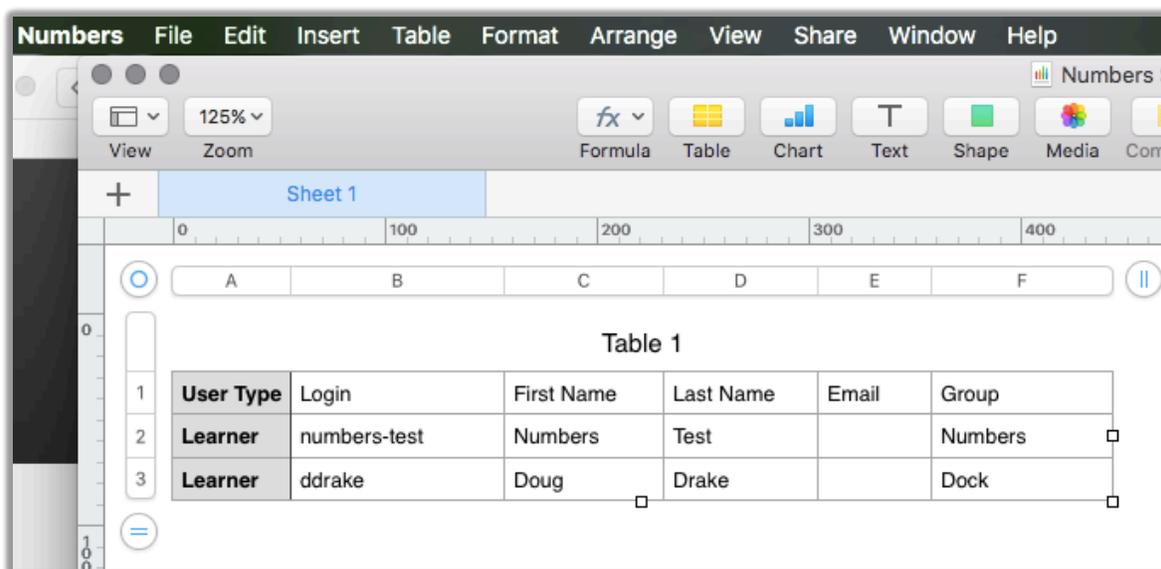
Login:

A user's login must be at least four characters, and unique to that specific user. You may use their email address as their login if you wish, or any combination of letters and numbers.

Email:

You may choose to enter an email address for your users (column E). This will allow you to send reminder notifications to them about upcoming or newly assigned training courses. However, you **may not** duplicate email addresses in the system.

You can either type data into the file or copy and paste from an existing file. There should be no extra blank rows, columns or cells in the sheet. There should be only 1 sheet in the file.

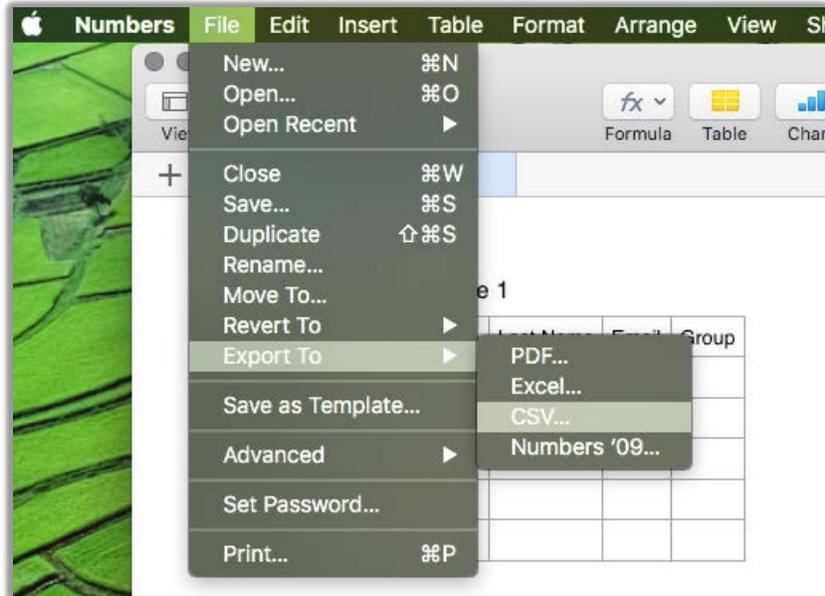


The screenshot shows the Numbers application interface. The spreadsheet has columns A through F and rows 1 through 3. A table titled "Table 1" is embedded in the spreadsheet, starting at row 1, column A and ending at row 3, column F. The table contains the following data:

	User Type	Login	First Name	Last Name	Email	Group
1	Learner	numbers-test	Numbers	Test		Numbers
2	Learner	ddrake	Doug	Drake		Dock

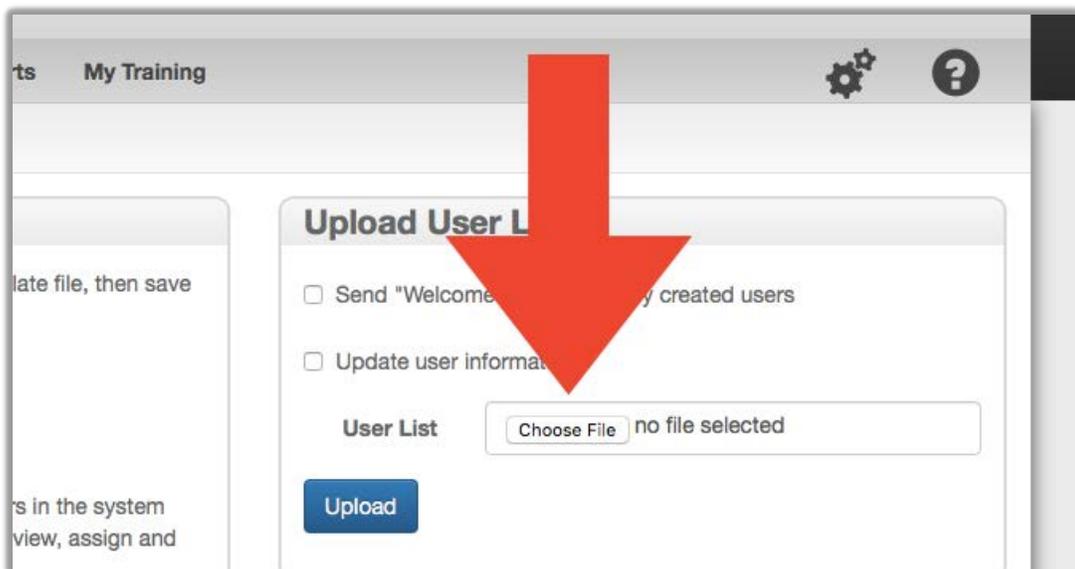
How to “Save” the File

When you have successfully completed filling out the template file, you will **export the file from Numbers to a CSV file**. To do this click “File>Export To>CSV...”. Your computer will then prompt you to name and save the file.

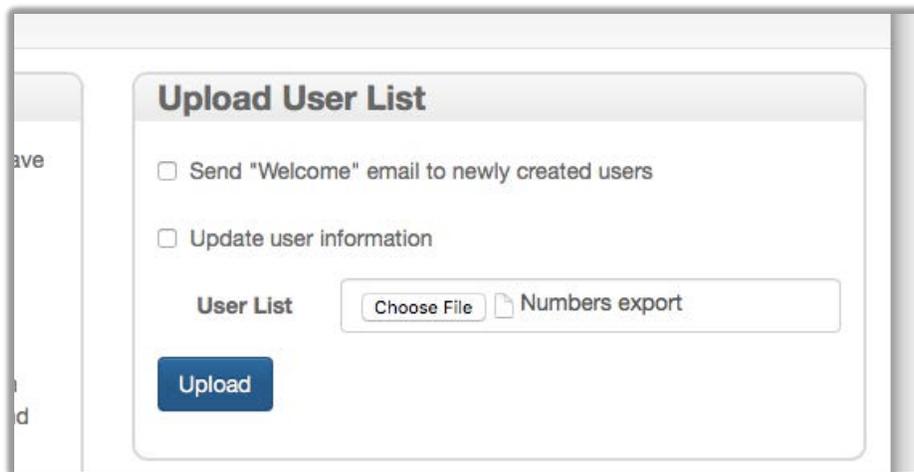
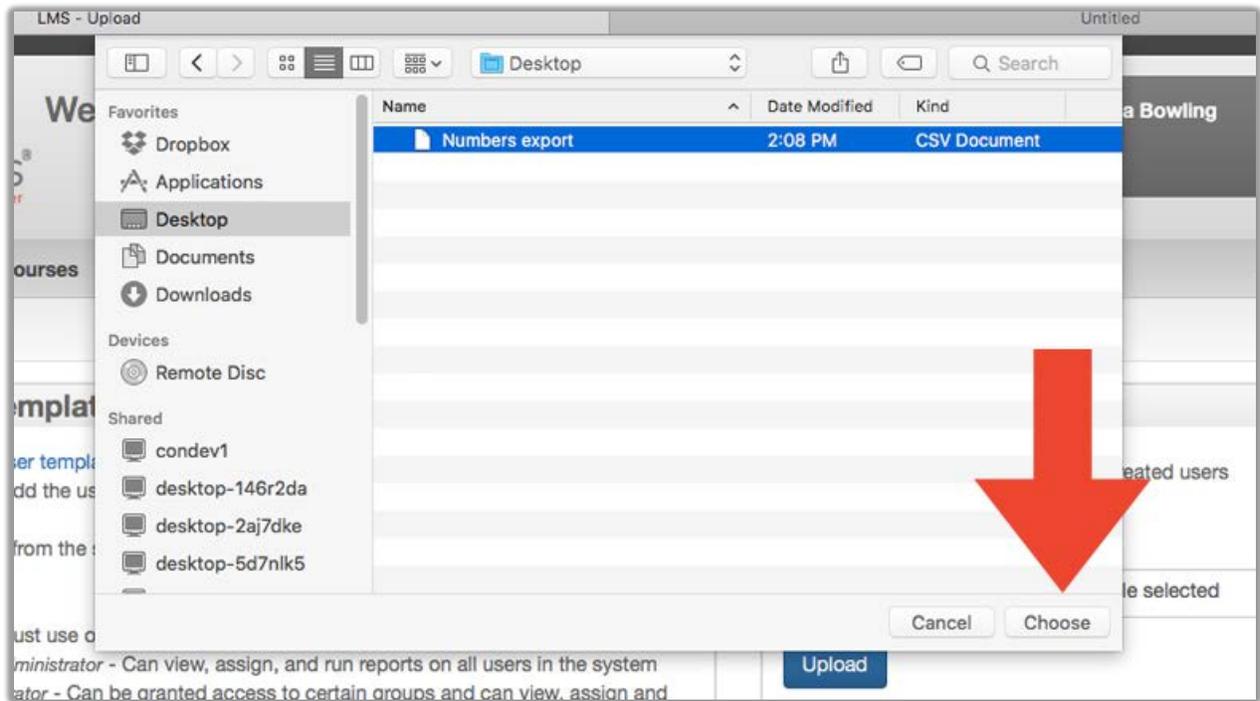


How to Import the File

To import the file to the LMS, go back to the “Add Multiple Users” feature from the Configure tab. Click “Choose File” to browse your computer and find the CSV file you exported.



Once you have located the file you would like to import, click “Choose.”



After you have the file selected click the blue “Upload” button.

If you have listed existing users on your file, be sure to check the “Update User Information” box before you click “Upload” so that the LMS knows to update existing user information. Otherwise, you will receive an error report.

After Your File Has Been Processed

After the file has been processed the LMS will tell you the number of users added, updated, or if there were any errors. If errors occur while processing your file, please save the error report and review the error messages. If you have any questions or need any help correcting the errors, please email the SafetySkills customer care team at support@safetyskills.com and include a copy of the error report you received so we can take a look and let you know how to resolve the errors.

What to Do If Your Data is On Any Existing File

If your user data is available in another file format you should be able to edit your file in numbers. You will need to add the columns headers as they line up to the LMS. Again the required column headers are "User Type," "Login," "First Name," "Last Name," "Email," and "Group". If you have added any "Custom Fields" to the LMS you will need to add those fields to the file as column headers as well.

Make sure to **export your file to the CSV format**, then you can import it into the LMS. Make sure you have removed any blank rows, columns or cells as needed.

Also you will need to be cautious of how data has been deleted from the file, by yourself or by anyone who handled the file before you received it. Simply deleting what you see does not fully remove that there was once data in a cell when working with CSV files. The cell, row or column must be deleted from the file to prevent blank cells from creating errors. A "best practice" would be to select a few columns to the right of the last column that contains data and delete the columns from the file. Then do the same thing with a few rows below the last row of data on your file. This will hopefully remove any ghost cells, rows or columns from the file.

How Many People Can I Add?

Depending on your account type there may be a limit to the number of users you can add to your account. If you are utilizing a "EnterpriserPro" account, your seat count and active users will be listed on the "Home" tab of the LMS. You can add users until your seat limit is reached.

If you are utilizing one of our account types where you pay per assignments, then there is no limit to the number of active users you can put in your account.