

PleaseReview v6.4 quick guide to importing users

This quick guide provides an overview of how to import users using PleaseReview.

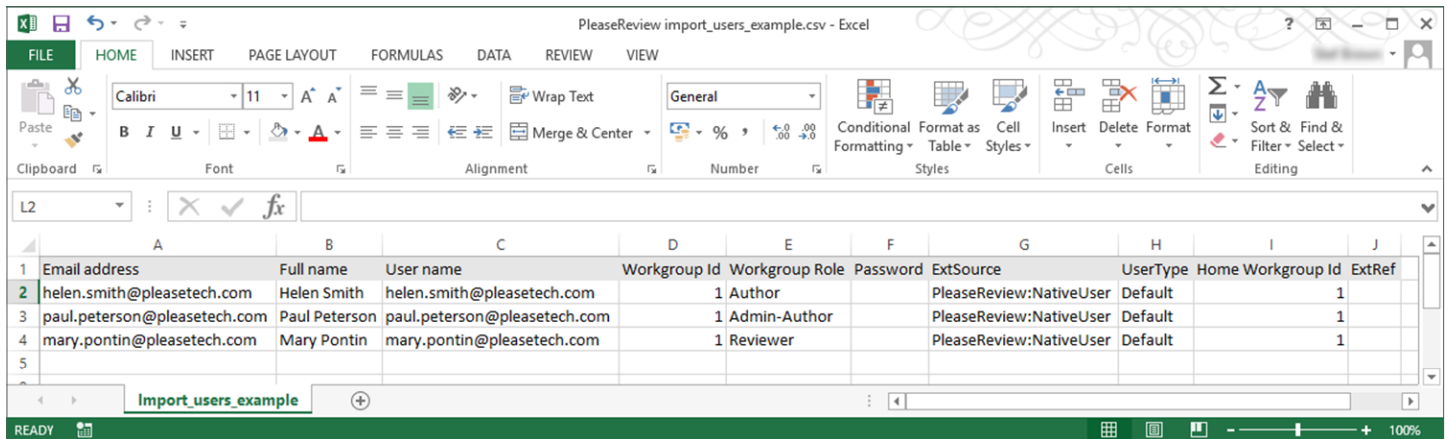
These instructions are specific to PleaseReview instances integrated with Okta, Ping, and Azure for user authentication (SSO).

Set User Roles

Complete the 'PleaseReview import users' CSV file provided by Ideagen.

You only need to complete columns: A,B,C, E and J.

Important – The value in column C must match the value in column J as this is the SSO username.



	A	B	C	D	E	F	G	H	I	J
1	Email address	Full name	User name	Workgroup Id	Workgroup Role	Password	ExtSource	UserType	Home Workgroup Id	ExtRef
2	helen.smith@pleasetech.com	Helen Smith	helen.smith@pleasetech.com	1	Author		PleaseReview:NativeUser	Default		1
3	paul.peterson@pleasetech.com	Paul Peterson	paul.peterson@pleasetech.com	1	Admin-Author		PleaseReview:NativeUser	Default		1
4	mary.pontin@pleasetech.com	Mary Pontin	mary.pontin@pleasetech.com	1	Reviewer		PleaseReview:NativeUser	Default		1

When PleaseReview users are initially set up on the system, they must be assigned a workgroup role. This workgroup role is a maximum setting and may be overridden for each review. The workgroup roles available include:

- Reviewer
- Contributor (includes Reviewer roles)
- Author (includes Reviewer roles)
- Author-Contributor

Additionally, Workgroup Administrator, Monitor and Managerial Delegation can be added to a Workgroup role.

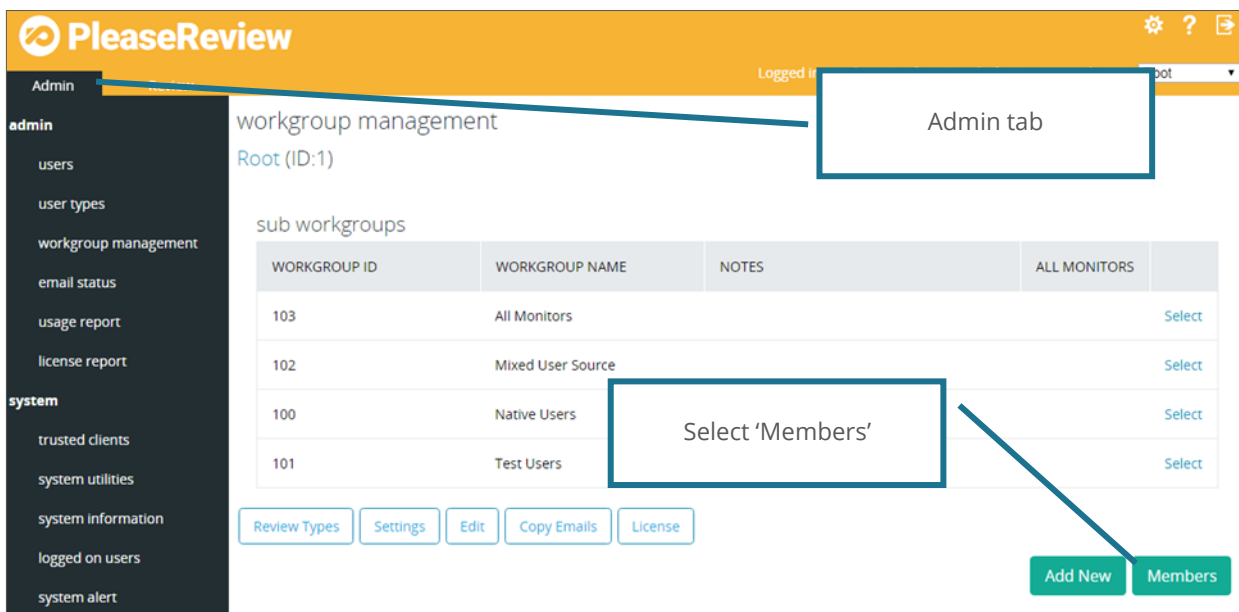
For further information on PleaseReview workgroup roles, refer to the Quick Guide to Roles.

Import Users

The completed csv file can now be imported into PleaseReview.

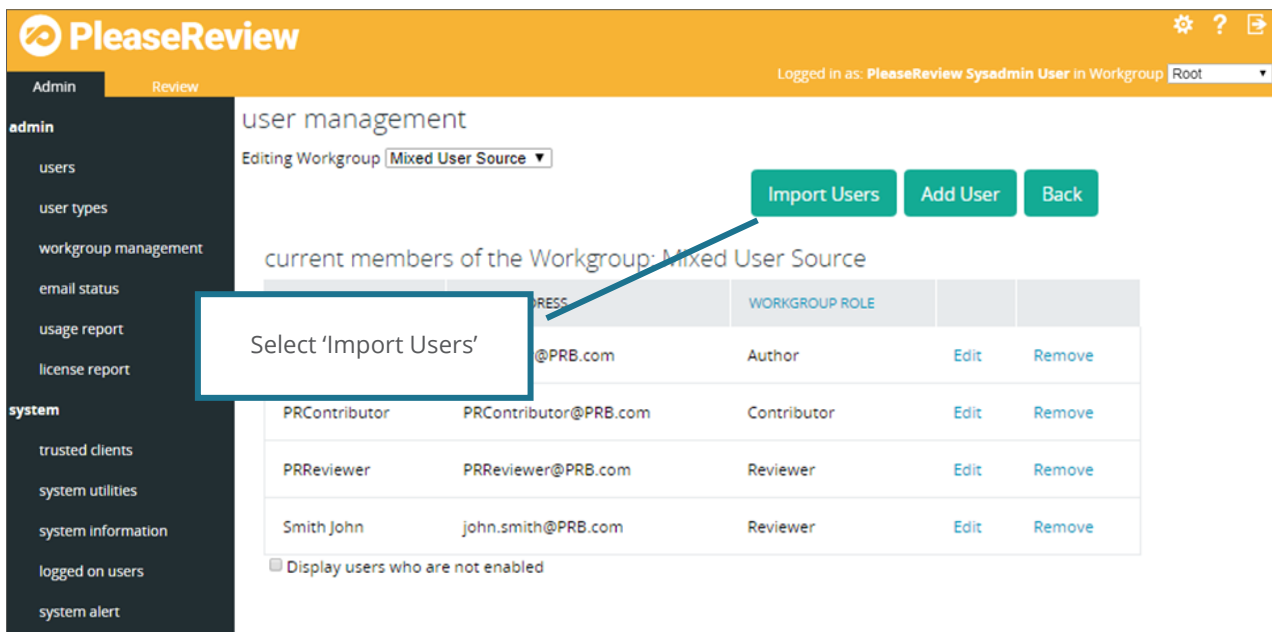
Sign into PleaseReview using the System Administrator login details.

Select the 'Admin' tab in the top left hand side of the home screen, then select 'Members' as shown below:



The screenshot shows the PleaseReview web application interface. On the left, there is a dark navigation menu with the 'Admin' tab selected. The main content area displays 'workgroup management' and 'sub workgroups'. A table lists sub workgroups with columns for Workgroup ID, Workgroup Name, Notes, and All Monitors. At the bottom right, there are buttons for 'Add New' and 'Members'. Annotations with boxes and arrows point to the 'Admin' tab in the navigation menu and the 'Members' button.

In the User Management screen, select 'Import Users':



user management

Editing Workgroup: **Mixed User Source**

Import Users Add User Back

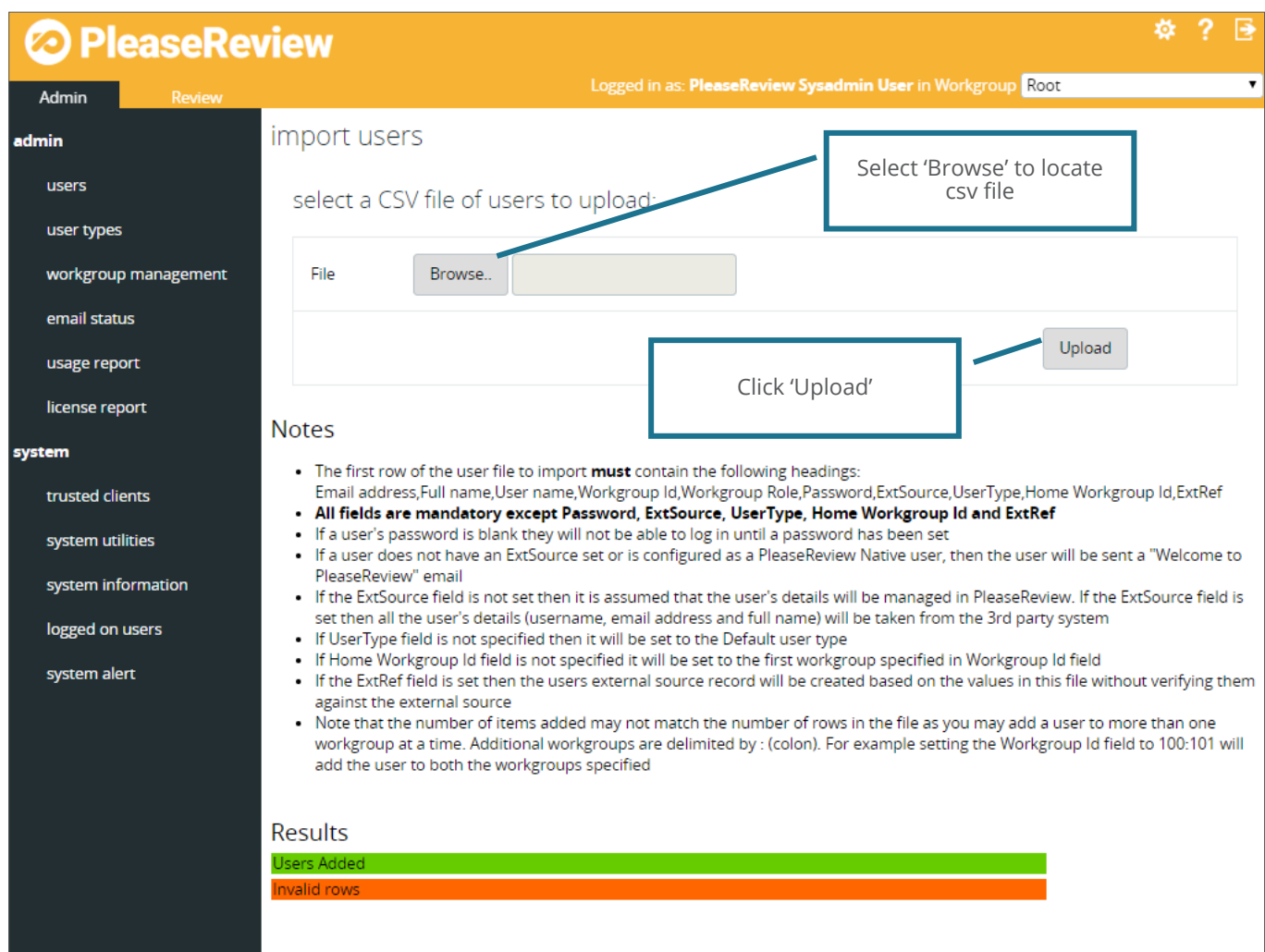
current members of the Workgroup: Mixed User Source

NAME	EMAIL	WORKGROUP ROLE	Edit	Remove
PRContributor	PRContributor@PRB.com	Contributor	Edit	Remove
PRReviewer	PRReviewer@PRB.com	Reviewer	Edit	Remove
Smith John	john.smith@PRB.com	Reviewer	Edit	Remove

☐ Display users who are not enabled

Select 'Browse' and locate the completed csv file.

Finally, select 'Upload' to upload the users listed in the csv into PleaseReview:



import users

select a CSV file of users to upload:

File

Notes

- The first row of the user file to import **must** contain the following headings: Email address, Full name, User name, Workgroup Id, Workgroup Role, Password, ExtSource, UserType, Home Workgroup Id, ExtRef
- All fields are mandatory except Password, ExtSource, UserType, Home Workgroup Id and ExtRef**
- If a user's password is blank they will not be able to log in until a password has been set
- If a user does not have an ExtSource set or is configured as a PleaseReview Native user, then the user will be sent a "Welcome to PleaseReview" email
- If the ExtSource field is not set then it is assumed that the user's details will be managed in PleaseReview. If the ExtSource field is set then all the user's details (username, email address and full name) will be taken from the 3rd party system
- If UserType field is not specified then it will be set to the Default user type
- If Home Workgroup Id field is not specified it will be set to the first workgroup specified in Workgroup Id field
- If the ExtRef field is set then the users external source record will be created based on the values in this file without verifying them against the external source
- Note that the number of items added may not match the number of rows in the file as you may add a user to more than one workgroup at a time. Additional workgroups are delimited by : (colon). For example setting the Workgroup Id field to 100:101 will add the user to both the workgroups specified

Results

Users Added

Invalid rows

Once uploaded, you will see the results of the import at the bottom of the screen: