PleaseReview v6.4 quick guide to importing users

This quick guide provides an overview of how to import users using PleaseReview.
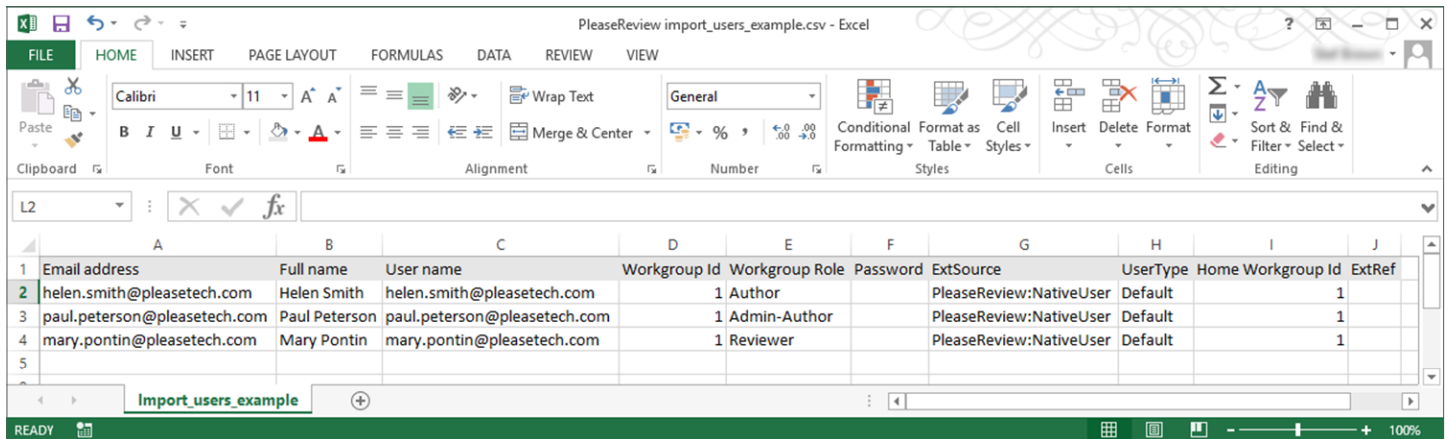
These instructions are specific to PleaseReview instances integrated with Okta, Ping, and Azure for user authentication (SSO).

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.

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

Additionally, Workgroup Administrator, Monitor and Managerial Delegation can be added to a Workgroup role.
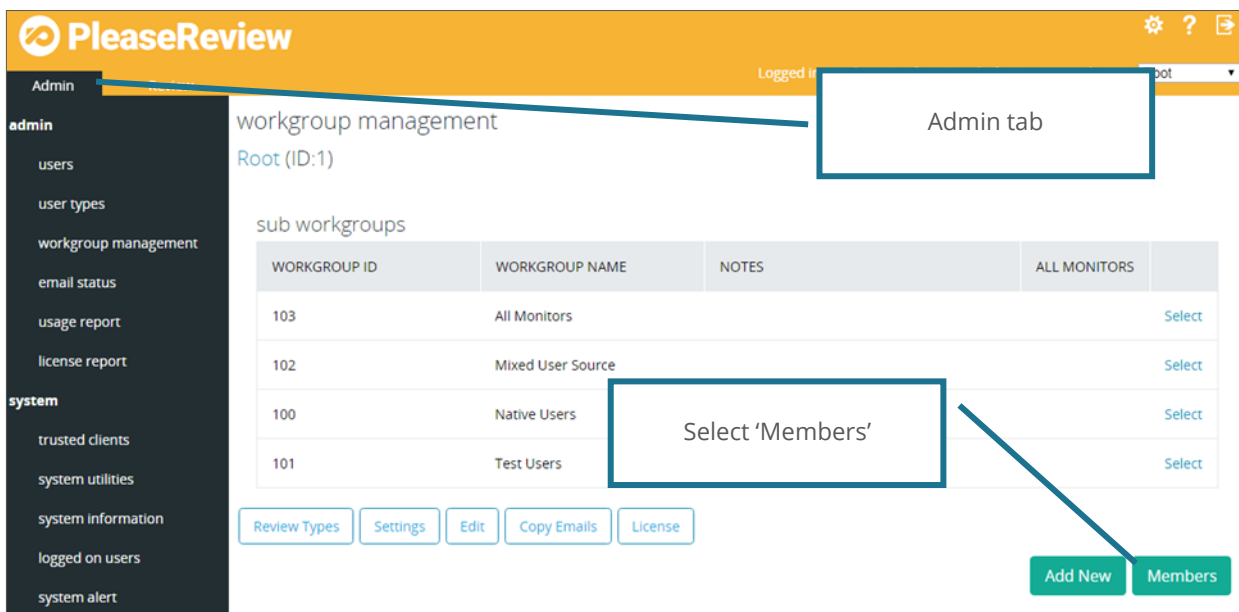
For further information on PleaseReview workgroup roles, refer to the Quick Guide to Roles.

Import Users

The completed csv file can now be imported into PleaseReview.
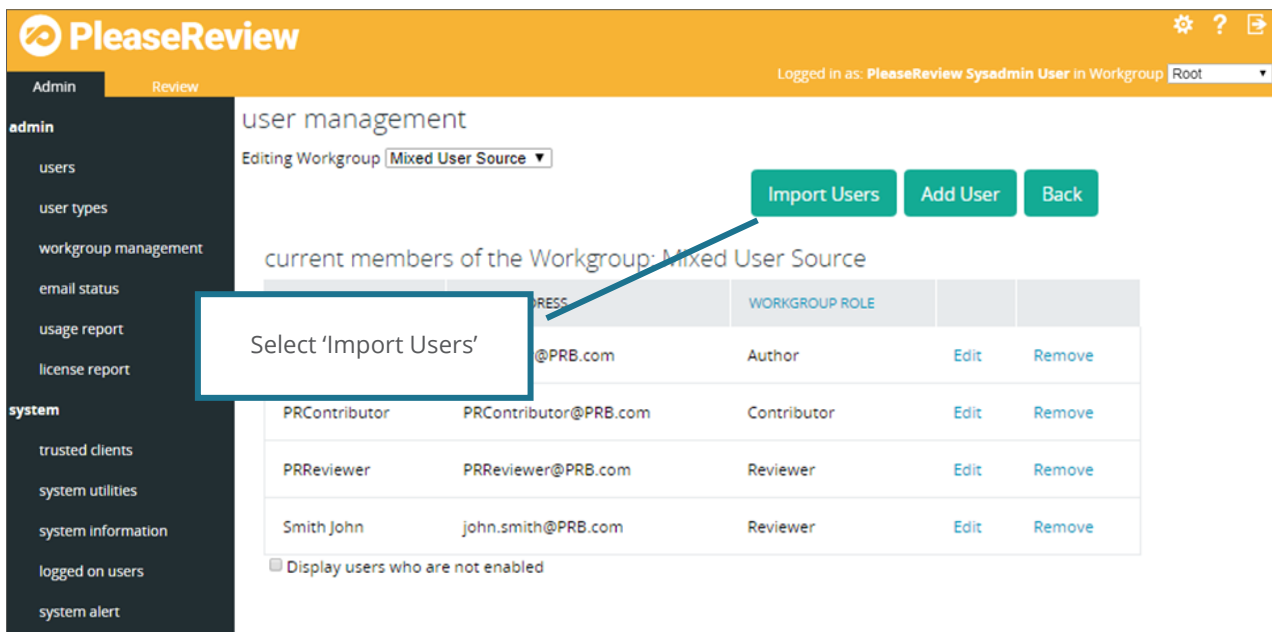
Sign into PleaseReview using the System Administrator login details.

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

In the User Management screen, select 'Import Users':
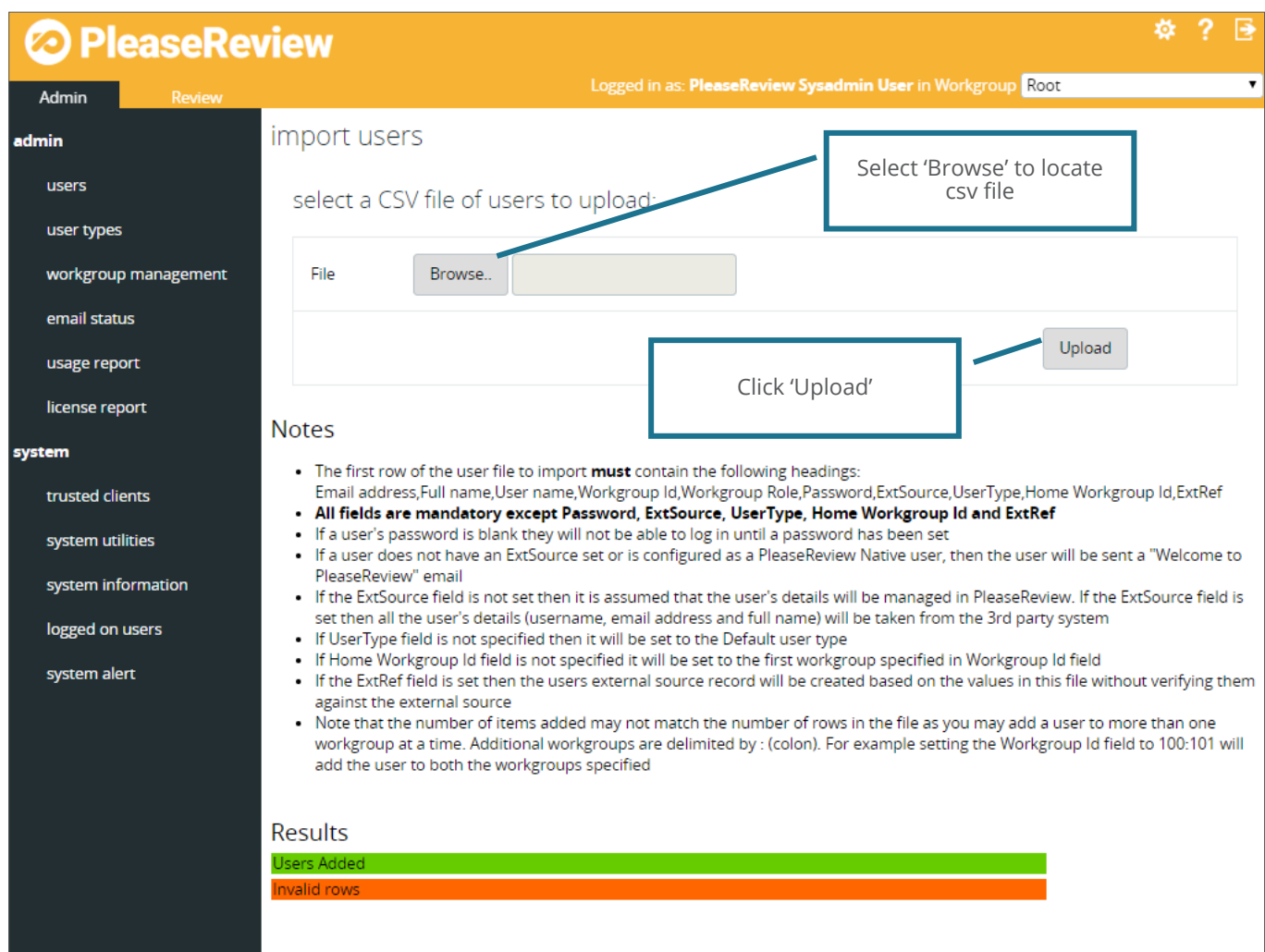
Select 'Browse' and locate the completed csv file.

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

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