Create users from an account list

Applies to userXpress 2.0.0.0

Import new user IDs and source accounts, assign initial passwords and create users in selected systems.

This workflow copies each new user from an existing source account. It is separate from Mass User Create, whose spreadsheet defines roles and account attributes directly.

Prepare the account list

Use an `.xlsx` workbook with these 16 headers in the first row, in exactly this order. Header names are case-sensitive. Keep the columns even when a value is optional.

Column	Header	Value
A	`UserID`	New user ID
B	`CopyFrom`	Existing source user
C	`InitialPassword`	Initial password. If blank on import, complete password generation before creation.
D	`Alias`	Optional alias value
E	`FirstName`	Optional first-name value
F	`LastName`	Last name. A blank value uses the new user ID.
G	`Address`	Copy address data
H	`Defaults`	Copy defaults
I	`Parameters`	Copy parameter assignments
J	`RefUser`	Copy reference-user assignment
K	`Roles`	Copy roles
L	`Profiles`	Copy profiles
M	`Groups`	Copy groups
N	`Personal`	Copy personal data
O	`License`	Copy license data
P	`EasyAccess`	Copy Easy Access menus

In columns G–P, enter `N` to exclude that data from the copy. A blank value copies the data. Use only `N` or a blank cell for these controls. Other values are not a reliable way to express “no”.

Review a small sample before applying the list broadly.

The source user must exist in each relevant target system/client. Verify its roles and profiles before using it as a template.

Import and assign passwords

1. Open the account-list batch-creation window and choose **File** → **Import**.
2. Import the workbook and review the rows.
3. If needed, choose **Set Password** → **Individual** to generate individual passwords, or **Set Password** → **Same** when your approved process requires a shared initial value.
4. Save the updated account list using **File** → **Save List**.

After the application generates passwords, **Accounts** → **Create Users** remains unavailable until the updated list has been saved.

The saved file contains credentials. Protect it appropriately.

Create and verify

Select the intended system/client combinations and choose **Accounts** → **Create Users**. Monitor the results. Use **Accounts** → **Cancel** if you need to stop. Inspect what already completed before restarting.

Select a user in the grid to view that user’s logs. Select a system/client in the system panel to narrow the logs to that target. Resolve failures individually rather than assuming that all accounts were created.

This workflow imports `.xlsx` workbooks, not CSV or XML files.