Templates and downloads

Applies to userXpress 2.0.0.0

Choose the workbook or document for account creation, account updates and role filters, and obtain the SAP role package.

Choose the file for your task. The workbook commands below save the format used by your installed userXpress application.

- Create new accounts: use the Mass User Create example workbook.
- Update existing accounts: export the accounts you want to change.
- Notify newly created users: save the Word mail-merge template and use the creation results workbook.
- Prepare or share role filters: save the filter template or export your saved filters.
- Assign SAP access for userXpress: download the SAP role package from the installation documentation.

Mass User Create workbook

Use this workbook when you need to create several accounts with personal details, roles, profiles and parameters.

To include choices from your SAP clients, connect those clients before saving the example workbook. Their values appear in lists such as user groups, languages and security policies.

1. Open **Mass User Create** from the main toolbar.
2. Choose **Help** → **Save Example Mass User Create Spreadsheet**.
3. Choose a folder and save the `.xlsx` file.
4. Choose **File** → **Open** in Mass User Create to open it.

The workbook includes **Full Description - Vertical** and **Full Description - Horizontal** examples and a **Your sheet** worksheet for your accounts.

Vertical batches share role, profile and parameter assignments. Horizontal batches hold those assignments on each user's row. Format and user-type cells have drop-down choices.

Follow Mass User Create to prepare and run the workbook. Use Workbook fields and formats for the headings, dates and blank-cell behavior.

Mass Changes workbook

Use this workbook to prepare different changes for existing accounts, such as a new validity date for each contractor.

1. Select the accounts in the Global User Table.
2. Choose **Users → Change → Mass → Mass Changes → Export Selected Users**.
3. In **Mass User Export**, choose the categories to include and the file path, then choose **Export**.
4. When **Messages** shows **Done**, choose **Open File**.

The export creates the **MassUserExport** worksheet from the selected accounts. It adds **Roles** and **Parameters** worksheets when those categories are included.

This workbook carries the account identities and values needed for an update. Follow Prepare the updates, then import it through **Import User Updates**. The field reference explains how empty cells and complete role or parameter lists affect the result.

Word mail-merge template

Use the template to prepare individual messages from the Mass User Create results, for example to send each person their new account details.

1. In **Mass User Create**, choose **Help → Save Example MS Word Mail Merge**.
2. Choose a folder and save the `.docx` file.
3. Open it in desktop Word and connect it to the saved creation-results workbook as the recipient list.

Follow Work with a mail-merge template for the Word controls, recipient fields and email-merge setup. Each system/client/user result row supplies one message.

Role content filter workbook

Use a filter workbook to prepare several queries together or share their definitions with another administrator.

1. In the Global Role Table, choose **Content Filter → Download Filter Template**.
2. Choose a folder and save the `.xlsx` file.
3. Open it and choose a starting point: **Ruleset**, **Simple examples** or **Advanced examples**. The **Instructions** worksheet explains the format.

Follow Import and export role filters to prepare the rows and import selected definitions into **My Queries**.

To share filters you have already saved, choose **Content Filter → Export Filters** and select their names. The export procedure explains what the workbook preserves.

SAP role package

Use the SAP roles download and assignment guide to obtain the ZIP package and import its roles into SAP.

The guide explains the communication role, user-administration role and composite role. After import in PFCG, generate the two single-role profiles and assign the composite role as described there.