USERXPRESS
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userXpress documentation

Bulk creation

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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.

Mass User Create

Applies to userXpress 2.0.0.0

Create accounts from a workbook, choose shared or individual assignments, and save each account's results and initial password.

Use **Mass User Create** to create a group of accounts whose details, roles and parameters are defined in a workbook. For example, a new team can share a set of roles while each person has their own name, email address and user ID.

Open **Mass User Create** from the main userXpress toolbar. The **Spreadsheet** tab contains the editable workbook. **Messages** contains workbook-check results and account-creation messages.

Obtain the example workbook

1. Choose **Help** → **Save Example Mass User Create Spreadsheet** and save the file.
2. Choose **File** → **Open** to open it in Mass User Create.
3. Use **Full Description - Vertical** and **Full Description - Horizontal** to see the layouts, then prepare your accounts on **Your sheet**.

The first row provides choices for field headings. Keep the headings for the information you want to supply, using Workbook fields and formats as a reference.

Format and user-type cells have readable drop-down choices. The workbook also offers titles, time zones, security policies, logon languages and user groups from connected clients. You can type a value directly. A value offered by one client can still be unavailable in another target client.

Help → **View Help** opens this guide. **Help** → **Save Example MS Word Mail Merge** saves a Word template for notifying users from the results worksheet.

Choose a layout

- **Vertical**: Use this when everyone in a batch receives the same roles, profiles and parameters. List those assignments down their columns. Names, contact details and other personal values remain on each user’s row.
- **Horizontal**: Use this when users need different assignments. Put each user’s roles, profiles and parameter pairs across that user’s row.

Set cell A1 to `Vertical` or `Horizontal`. Separate batches with two completely blank rows. For example, give Accounts Payable and Accounts Receivable separate Vertical batches when each team needs a different set of roles.

See Repeatable assignments for role dates, parameter pairs and the Horizontal profile restriction.

Set targets for the batch

In both layouts, `System`, `SID` and `Client` define the targets for **every user in the same batch**. They do not belong to the user on the same row. Enter each intended target once, using matching system, SID and client values.

For example, a batch with two users and targets `ABC / 001` and `ABC / 100` creates both users in both clients: four accounts in total. Repeating a target beside each user can repeat processing. Use separate batches, divided by two blank rows, when different groups of users need different targets.

Connect the target clients through the Control Panel before running the workbook check.

Start from exported user objects

Select users in the Global User Table and choose **Export User Objects** to prepare a Horizontal workbook containing their details, roles and parameters. Use this as a starting point when new accounts need similar settings to existing accounts.

Users may come from several source systems. The exported file is one batch until you divide it into separate batches.

The exported `System`, `SID` and `Client` cells are blank so that you can choose the batch's destinations. Their drop-down lists contain choices from the clients connected when the file was exported. The lists are stored in the workbook and work in Excel and the Mass User Create spreadsheet editor.

1. Set `User_ID` and the personal details for the accounts you want to create.
2. Choose matching target values and enter each destination once. A choice in one list does not automatically select matching values in the other two lists.
3. Preserve three-digit clients such as `001`.
4. Run **Check → Format & Systems** after editing.

Existing accounts in a target are reported during checking. To change existing accounts from a workbook, use Mass Changes.

The export shows waiting, active and completed clients. Cancellation waits for active reads to finish. A failed or cancelled export does not provide a completed workbook. Read the reported error before trying again.

Open and check

1. Choose **File → Open** and select the workbook.
2. Select the worksheet containing the accounts to create.
3. Save any edits with **File → Save**, or use **Save As..** to save a separate workbook.
4. Run **Check → Format & Systems**. userXpress checks the worksheet first, then checks its target clients.

5. For a reported problem, use the highlighted cell or **Messages** entry to locate the value and correct it. Save your changes and run **Check → Format & Systems** again.

When the checks succeed, **Accounts → Start** and **Create Users** become available.

The check uses the active worksheet. Switching worksheets clears its check results. Run the check again when returning to that worksheet.

What the check covers

The worksheet check covers the layout marker, required headings, duplicate headings, target identifiers, account dates and coded preferences. The field reference explains the accepted values and blank-cell defaults.

The SAP check covers:

- Connections to the listed systems and clients.
- Existing user IDs and aliases in each target.
- The requested roles, profiles, parameters, output devices, reference users, user groups and security policies.

If **Client Connections** lists disconnected targets, connect those clients in the Control Panel and run **Check → Format & Systems** again. Other problems appear against their target client in **Messages**.

Find a reported cell

Point to a column heading for entry guidance, or to a highlighted cell for its message.

1. Choose **Messages → Show** to open the message list.
2. Double-click an entry with a cell reference. userXpress switches to the **Spreadsheet** tab and selects that cell.
3. Correct the value and run **Check → Format & Systems** again.

Next Cell and **Previous** step through cells reported by the worksheet check. **Messages → Export** saves the displayed message list to an Excel workbook.

Create accounts

Choose **Accounts → Start** or the **Create Users** toolbar button. userXpress processes every account in the active worksheet's batches against that batch's listed targets.

The status bar shows progress as clients and users are processed. Several clients can be active at once. Completed account information is added to the Global User Table, and the results worksheet opens when processing finishes.

Pause or stop

- Choose **Accounts → Pause** to pause after the active account operations finish. Choose **Accounts → Start** to continue.

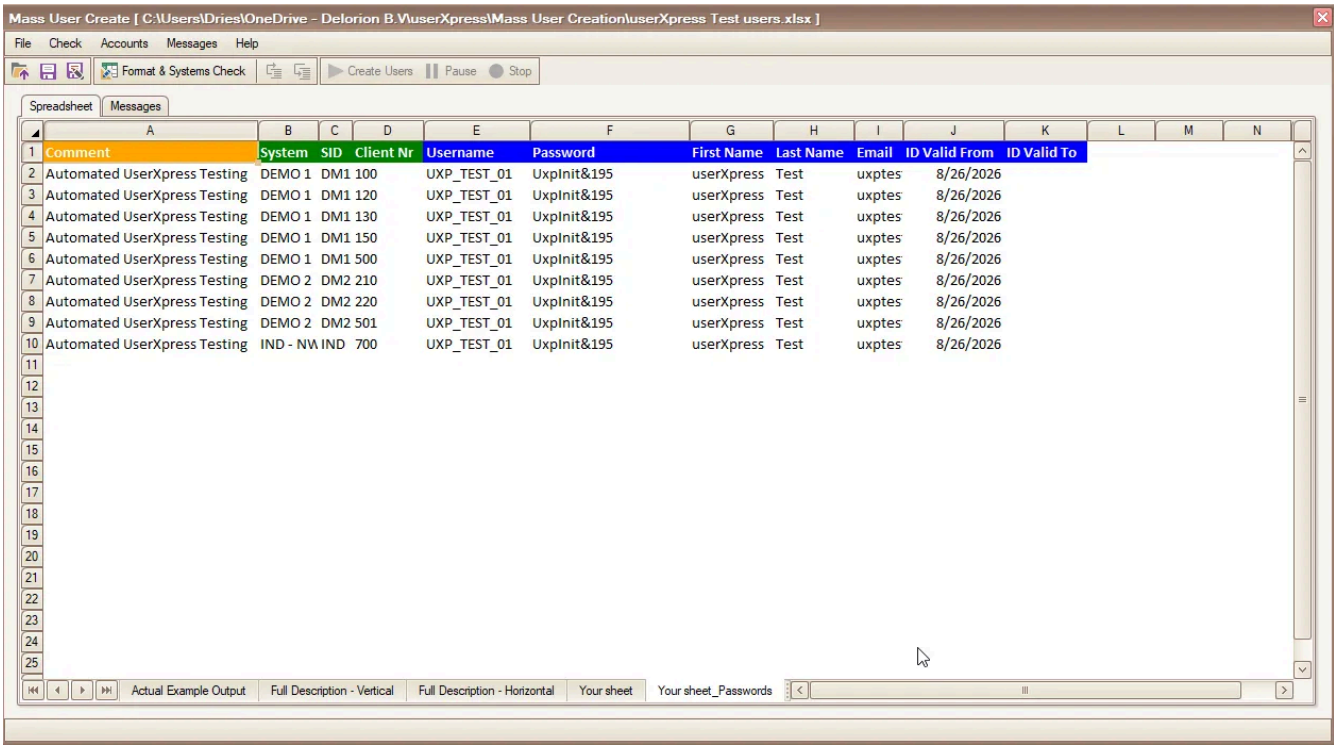
- While processing is active, choose **Accounts** → **Stop**, then **Yes**, to stop the run. Active account operations finish before the results are displayed. Accounts already created remain in SAP.

A stopped or incomplete run retains its progress for **Accounts** → **Start** to resume. See Recover a mass-creation run for the resume choices and recorded failures.

Save and review results

Use the **Save** toolbar button to save the workbook with its new results worksheet. The worksheet name normally ends in `_Passwords`, with a suffix when that name already exists.

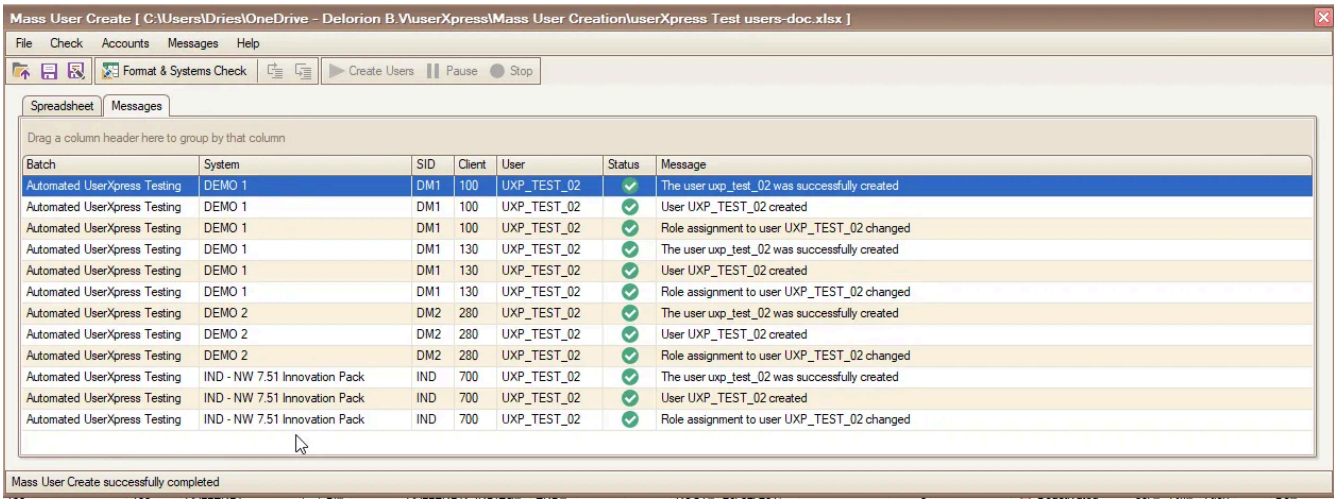
Each row identifies an account and its target through **System**, **SID**, **Client Nr** and **Username**. It also contains the recorded **Password**, name, email address and account-validity dates. **Comment** identifies the batch.



The results worksheet records account details and initial passwords by target client.

Open **Messages** for the account-creation and role-assignment outcomes. **Batch**, **System**, **SID**, **Client** and **User** identify the target of each **Message**.

- **The user … was successfully created** reports account creation. Role-assignment messages follow separately.
- **The user … was not created** is followed by SAP's explanation. Its password cell is empty.
- A role-assignment error can occur after an account was created. Resolve that assignment for the existing account using Update role assignments.



The Messages tab lists account-creation and role-assignment outcomes for each client.

After a stopped run, the **Save** toolbar button remains available. Use the recovery guide for a highlighted password beginning with `Error:` or a message that the Global User Table could not be updated.

For account notifications, see Work with a mail-merge template.

Choose **File** → **Close** to close the workbook or **File** → **Exit** to leave Mass User Create. If an unsaved-workbook warning appears, choose **No** to return and save it. Choosing **Yes** closes it without saving.

Recover a mass-creation run

Applies to userXpress 2.0.0.0

Resume unfinished account creation, retain recorded passwords and resolve a specific creation or display failure.

Use recovery after stopping Mass User Create or after an application, workstation or connection failure interrupts the run. userXpress retains the batch and its recorded account results so it can continue unfinished work.

Resume or stop recovery

Continue from the open window

After **Mass User Create was stopped** or **Mass User Create was incomplete**:

1. Save the displayed results with the **Save** toolbar button.
2. Connect any missing target clients through the Control Panel.
3. Choose **Accounts** → **Start** to continue.

Resume skips system/client/user combinations that already have a recorded result, including recorded failures. It processes combinations without a recorded result and includes the earlier results in the new output.

After recovery has finished, address any **The user … was not created** result. Correct the reported cause, then prepare a separate batch for that account and target. For an account that was created but whose role assignment failed, update its assignments.

Continue after reopening userXpress

1. Start userXpress and connect the target clients.
2. Open **Mass User Create**. userXpress detects the incomplete run and asks whether you want to resume.

Choose the action you need:

- **Yes** loads the original workbook and saved batch, then resumes. If **Systems Not Connected** lists missing clients, connect them and choose **Accounts** → **Start**.
- **No** opens a worksheet of the recorded results and clears the saved resume state. Use this when you want to finish handling the run manually. At **Save Users Processed**, choose **Yes** to save those results.

Choosing **No** ends automatic recovery even if you cancel the subsequent save dialog. Save the displayed results before closing the window. If no results were recorded, userXpress reports that none were found.

If **Missing Spreadsheet** appears, restore the original workbook to the path shown in the message. Reopen Mass User Create and choose **Yes** at the recovery prompt.

Resolve uncertain accounts

A failure can occur after SAP creates an account but before its details are recorded. During recovery, an account found in this state is marked in **Messages** and in the results worksheet.

The **Username** and **Password** cells are highlighted, and **Password** begins with `Error:`. The cell comment explains that the initial password is unknown and role assignment could be incomplete.

For that system/client/user combination:

1. Reinitialize the password to obtain a new initial password.
2. Display its role assignments and compare them with the requested roles and dates in the input workbook.
3. Use Update role assignments for any missing assignments.

If the recovery prompt does not appear after an interrupted run, contact support with the last displayed message and the time of the interruption. Keep the input workbook and any saved results available for that investigation.

SAP creation completed with a display warning

SAP creation completed with a Global User Table display warning means the account-creation run finished, but the table could not show every created account. Save the results, then disconnect and reconnect the affected client to load its account list again. Do not rerun account creation to repair the display.

If **Mass User Create results could not be displayed** appears, the completed-user recovery data is retained. Reopen Mass User Create to use the recovery prompt.

Work with a mail-merge template

Use the results worksheet as a Word mail-merge source when you want to send each user their account details. Each system/client/user row becomes a separate message, so a person with accounts in several clients receives several messages.

Save the result workbook first. The template is available through **Mass User Create → Help → Save Example MS Word Mail Merge**. Email merge requires desktop Word and a compatible email program. See Microsoft's mail-merge instructions for the supported setup.

1. Open the template in Word and choose **Mailings → Start Mail Merge → E-mail Messages**.
2. Choose **Select Recipients → Use an Existing List**, select the saved workbook and select its results worksheet.
3. Use **Insert Merge Field** to place **Username**, **System**, **Client Nr** and the other required account values in your message.

4. Choose **Preview Results** and move through the records. Match each account's details to its **Email** recipient, and exclude rows with failed creation or an unknown password.
5. Choose **Finish & Merge → Send E-mail Messages**. Select **Email** in **To**, enter the subject and choose the records to send. Choose **OK** to send the individual messages.