How to Bulk Upload Users in CDX Fundamentals of Mobile Heavy Equipment, First Edition (FMHE 1e)

The following steps should be followed to upload all your users to the CDX Learning Systems course site. There are two steps required in this process. First, you must fill out a class roster spreadsheet with all user details needed for creating individual accounts. Second, your completed spreadsheet file must be uploaded to the course site to automatically generate all user accounts within the course site.

1. Begin by downloading the user upload template provided on the Support page. This is a .csv spreadsheet file which must remain in its default format when you have completed and saved it locally. Please ensure that you use the template corresponding with your FMHE 1st Edition course site.

2. The first 5 columns of the template require individual user account information consisting of the **username**, **first name**, **last name**, **email address**, and **city** of the user.

CDX

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3. Beginning with column F, the subsequent columns to the right account for each of the **courses** in which the user will be enrolled. In addition, you must specify the **role** the user will be assigned and identify the user **Group** in which they should be placed within each course. This is your opportunity to autogenerate and organize each of your independent classes or cohort groups within each of the online courses.

y	course1	role1	group1	course2	role2	group2	course3	rol
ty Name	Foundations & Safety	student	Group name 1	Electrical & Electronic Systems	student	Group name 1	Fluid Power	stu
ty Name	Foundations & Safety	student	Group name 2	Electrical & Electronic Systems	student	Group name 2	Fluid Power	stu

Name of the course user is enrolling in

Assigned user role upon enrollment

Group name in which user is placed upon enrollment

Complete these details for every course in which the user is enrolling

4. The template includes two fictitious users' information entered in rows 2 and 3 as examples of how each of your user's account details should be entered.

	A	B	C	D	E
1	username	firstname	lastname	email	city
2	euser	Example	User	euser@example.com	City Name
3	euser	Example	User	euser@example.com	City Name

CDX

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5. Once you are ready to enter in your users' information, begin by replacing the example users' in your template with details for two of your own students and complete all columns for each additional user in the rows below as needed. It is critical to enter a valid email address for each of your enrolling users. The email addresses listed here will be used to notify the individuals of their account setup by sending them an email with a URL of your site, their assigned username, and a randomly generated password which they will be asked to change when first logging in. Their email will also be required for resetting a password in the event the user forgets it.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	username	password	firstname	lastname	email	city	course1	role1	group1	course2	role2	group2	course3	role3	group3
2	ladams	changeme	Lisa	Adams	ladams@a	Nairobi	Safety and	student	Class A	Engine Re	student	Class A	Automatic	student	Class A
3	jsmith	changeme	John	Smith	jsmith@a:	Nairobi	Safety and	student	Class B	Engine Re	student	Class B	Automatic	student	Class B

6. Be sure to list which **role** they should be assigned, student or teacher, and enter the **Group** they will be placed in within each of the courses. The number of groups to be created and their naming is your decision. This must be completed for each of the 7 courses which complete the FMHE curriculum. Please note, while the Group field is optional, it is strongly recommended that you specify the Group or cohort a student will be placed in to help you manage different student cohorts within each course. If you do not include a Group for the user to reside in at this time, you may need to manually create and organize your Groups in each individual course after enrolling your users. It is best to do this now to save yourself time and effort later!

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	username	password	firstname	lastname	email	city	course1	role1	group1	course2	role2	group2	course3	role3	group3
2	ladams	changeme	Lisa	Adams	ladams@a	Nairobi	Safety and	student	Class A	Engine Re	student	Class A	Automatic	student	Class A
3	jsmith	changeme	John	Smith	jsmith@a:	Nairobi	Safety and	student	Class B	Engine Re	student	Class B	Automatic	student	Class B

CDX

7. Do not change the course names provided in the template. The course names listed in the example rows are written to match the course names on your site. Instead, copy and paste the course names for each individual user as needed, then enter the Role and Group information for each course until your full roster is complete. When finished, save your roster spreadsheet under a new name on your Desktop. Please note, you must save the file in its original **.csv format**.
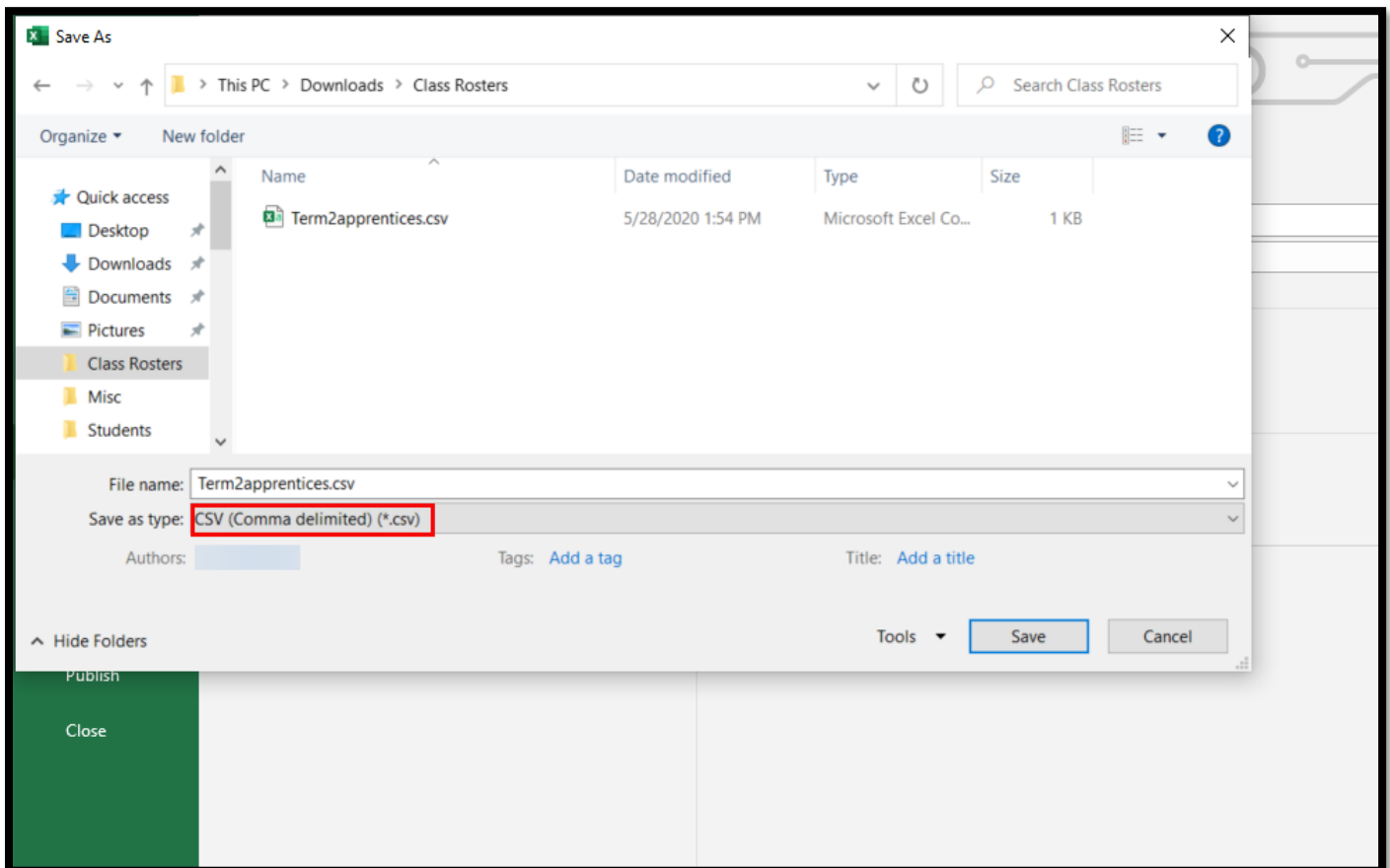
CDX

How to Bulk Upload Users in CDX Fundamentals of Mobile Heavy Equipment, First Edition (FMHE 1e)

8. With your complete roster file saved, you are now ready to upload the file to your course site to automatically generate all the user accounts. Begin by logging into your CDX site as an Admin. Please note, only users with administrative access to the site will have permissions to add new users to the site.
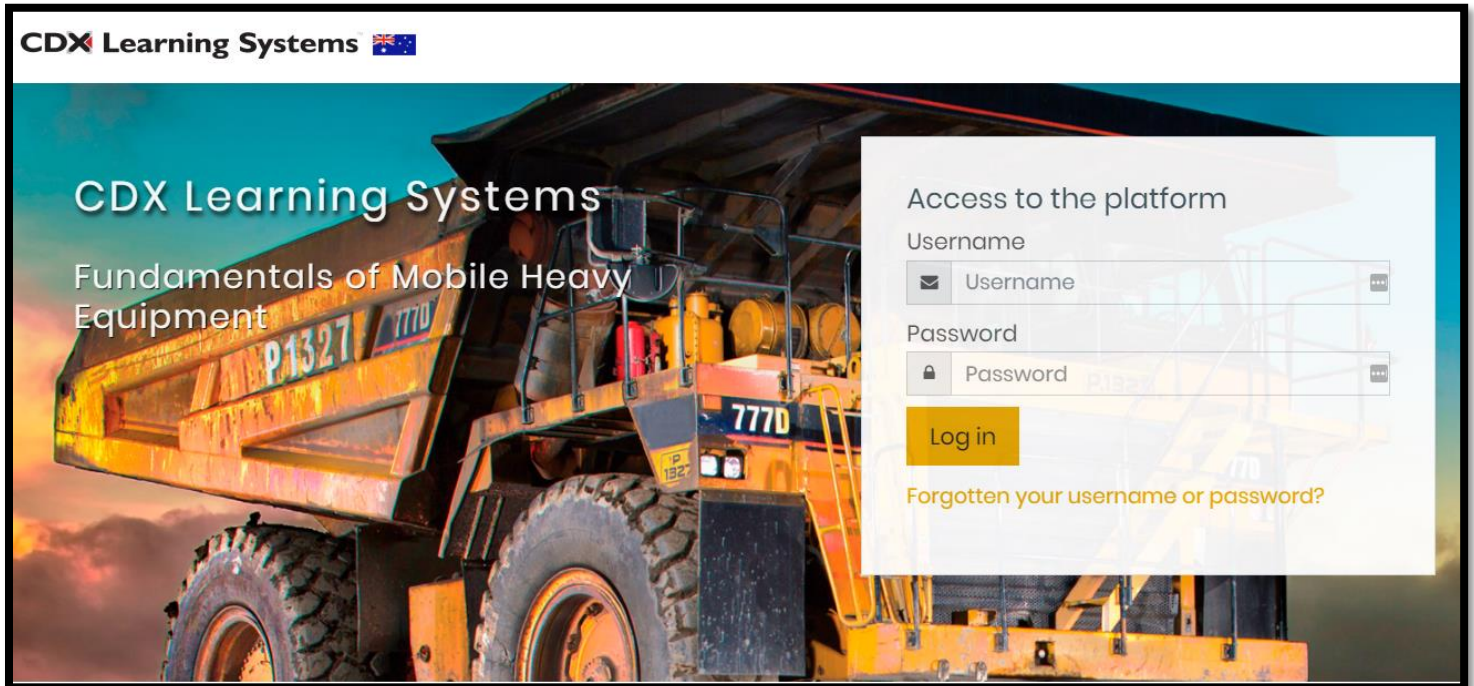
How to Bulk Upload Users in CDX Fundamentals of Mobile Heavy Equipment, First Edition (FMHE 1e)

9. After logging in, click the **Site administration** button in the site Navigate Drawer on the left side of the page.
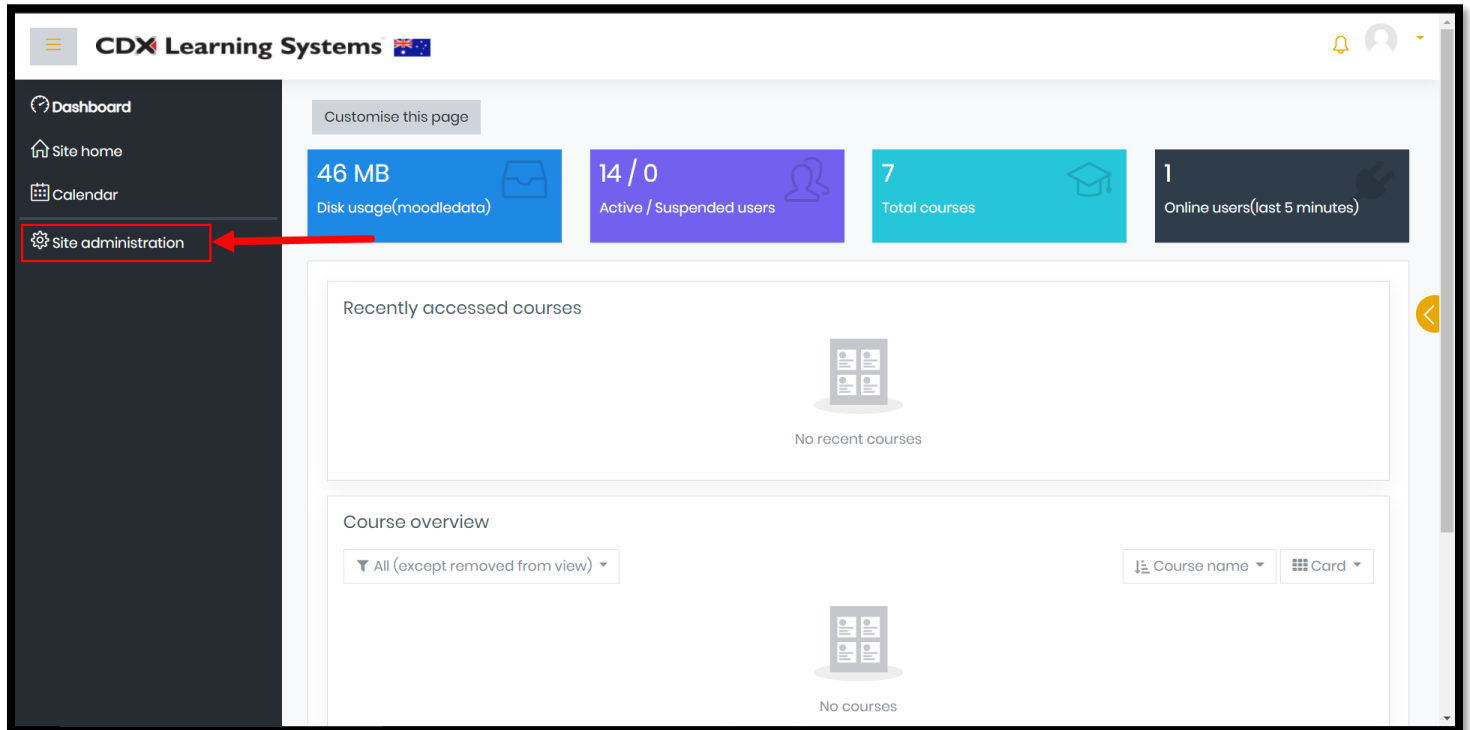
How to Bulk Upload Users in CDX Fundamentals of Mobile Heavy Equipment, First Edition (FMHE 1e)

10. Select the **Users** tab on the Site Administration page and then click the **Upload users** option under the **Accounts** section.
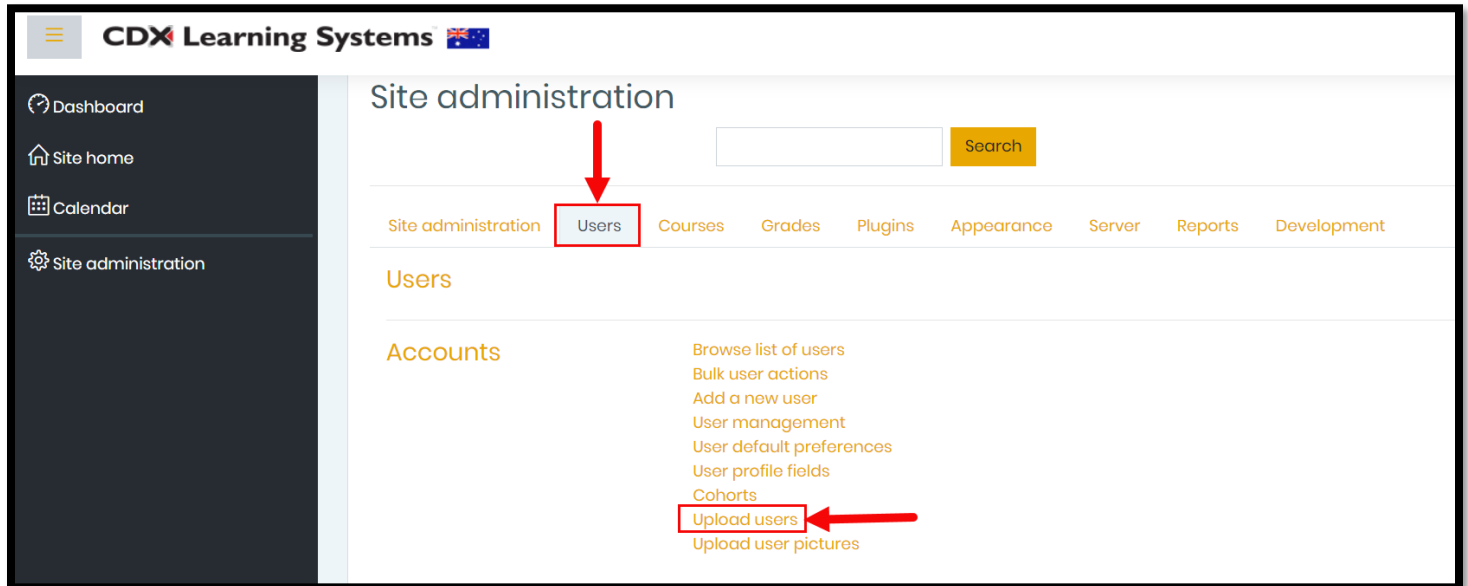
11. The Upload users page will display a file drop box field in which you must drag and drop your prepared .csv class roster file from its location on your Desktop.
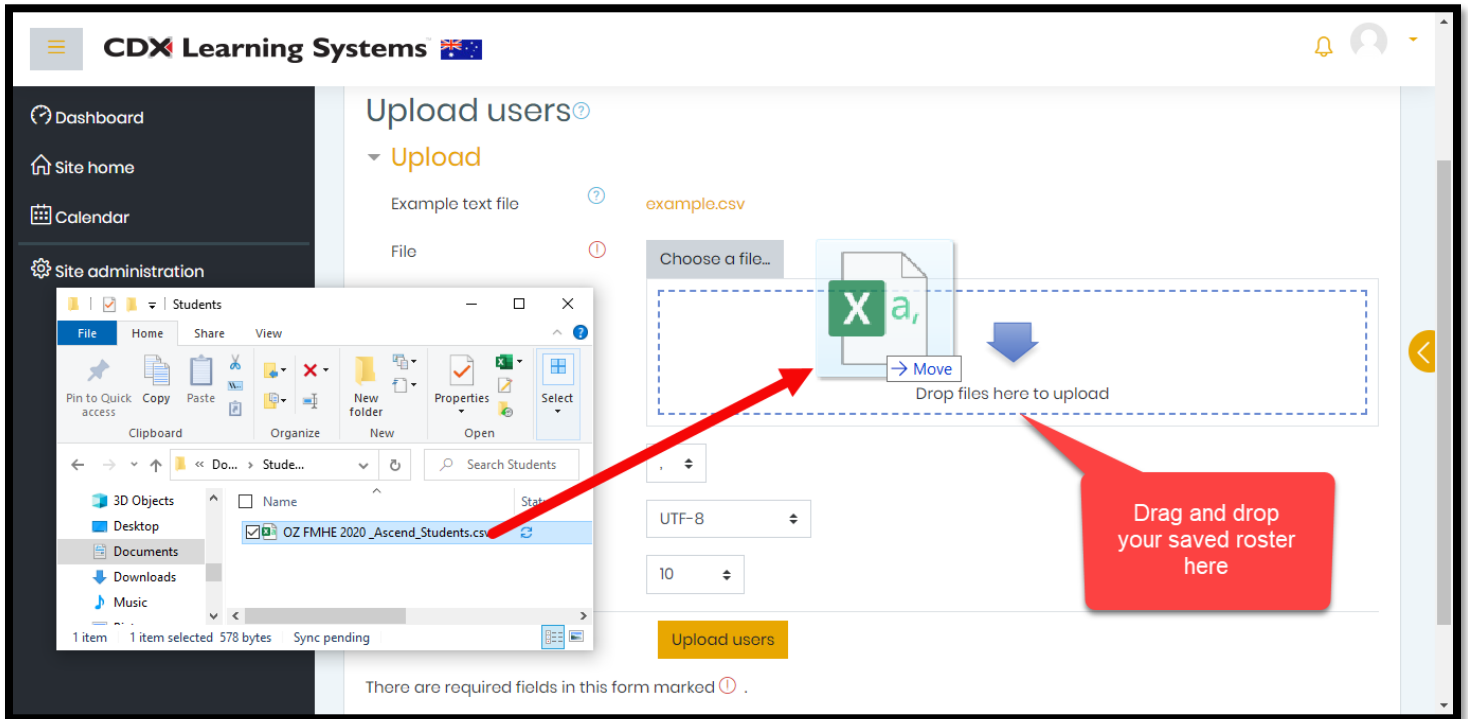
12. After the file completes loading to the box, click the **Upload users** button below.

13. An Upload users preview page will open, displaying the first rows as they were entered in the spreadsheet file. Please take a few moments now to verify that the user information you have uploaded is complete and accurate. We recommend leaving all default settings on this page as they are. When ready, scroll to the bottom of the page and click **Upload users.** An email notification will automatically be sent to each of the uploaded users containing their login credentials. Upon logging into your site for the first time, they will be required to change their password.

14. On the following page of Upload user results, you will see a list of all students who have been successfully added to your courses and can confirm their enrollment under the **Enrolments** column. Scroll down to the bottom of this page and click the **Continue** button.
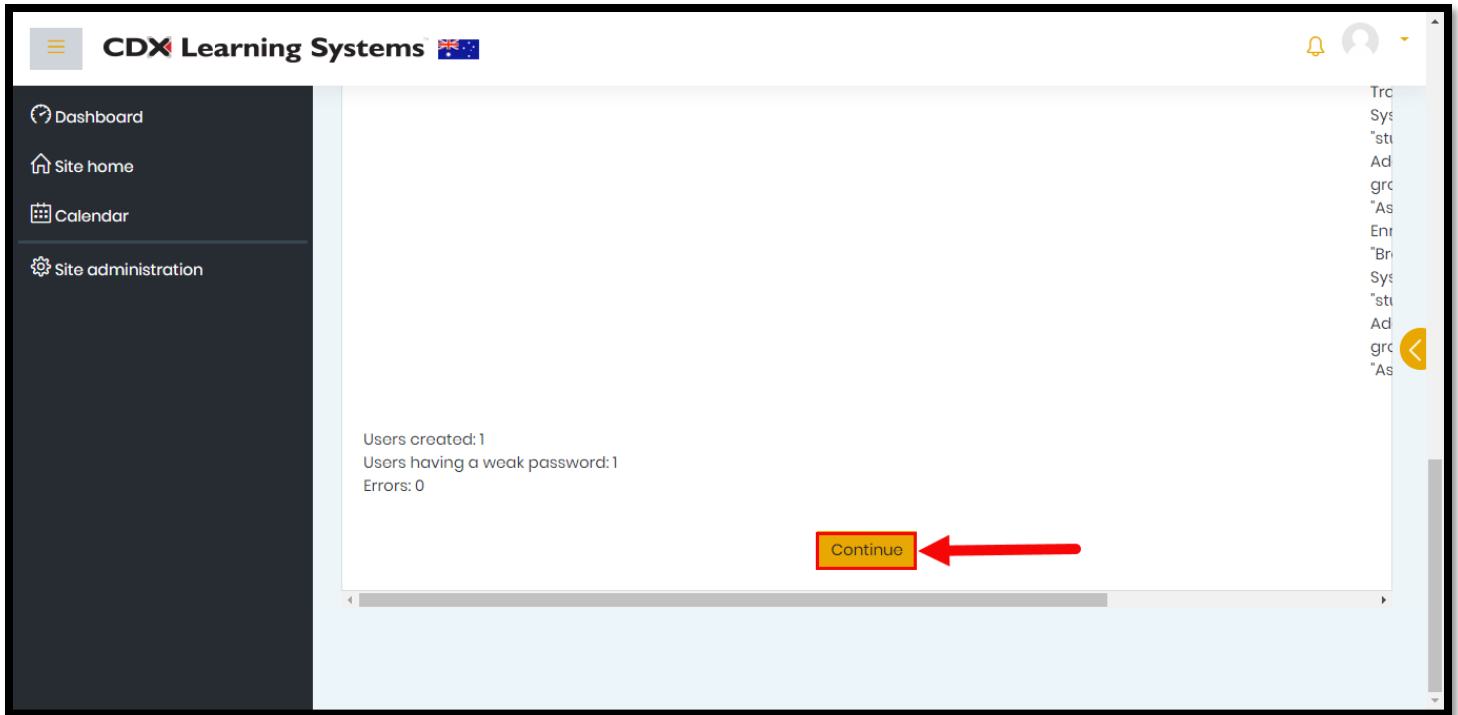
15. Return to your **Site home** using the corresponding button in the navigation drawer to the left. Next, open a course in which you have just enrolled your users, then click on the **Participants** link in the navigation drawer to verify that your uploaded users have been successfully added to the course.