



# Bulk import teams

Tags: **Flow**

If you need to import multiple teams, follow the steps below to bulk import your teams.

To learn more about managing and editing your teams, check out [Team management](#) and [Team details](#).

**Note:** You can use either the Flow REST API or the Teams page to bulk upload.

In this article

[Preparing to bulk import teams](#)

[Bulk importing teams via the API](#)

[Bulk importing teams via the Teams page](#)

[Bulk importing multi-tiered nested teams](#)

Who can use this?

<u>Core</u>	<u>Plus</u>
✓	✓

## Preparing to bulk import teams

Before bulk importing users, create a .csv file with the following columns:

- Name
- Email
- Team name
- Parent team name, if applicable
- [Membership visibility](#): Yes, No, or Inherit
- [Membership type](#): Viewer or Contributor

If you already have teams and users in Flow, simplify this process by downloading your existing team and user structure from the Teams page, then using this as a template for your changes. This ensures your .csv file has the correct columns and setup, and gives you a reference for how your users are already structured.

**Important:** When adding a new user or team, if membership visibility is left blank, we will default to Inherit. For an existing user or team, if membership visibility is left blank, we will not update this field.

Example .csv file:

The CSV file should include the following columns:

Name	Email	TeamName	ParentTeamName	Membership Visibility	Membership Type

Example:

```
name,email,team_name,parent_team_name,view_rights,membership_type
Michael,user1@email.com,team1,,Yes,Contributor
Dwight,user2@email.com,team1,,No,Viewer
Jim,user3@email.com,team2,team1,
Pam,user4@email.com,team1,,No
Toby,user5@email.com,team1,,Viewer
```

[back to top](#)

## Bulk importing teams via the API

You can bulk import teams from an API client.

To bulk import teams via the API:

1. Create an API key. To learn more about creating an API key, see [Flow REST API introduction](#).
2. Enter the following URL into your preferred API client:
  - `https://flow.pluralsight.com/v3/customer/core/team_membership/bulk_import/`
3. Choose the .csv file you created.
4. Specify the **import\_type** as either **overwrite** or **update**.
5. Set any additional parameters for your upload. Find these additional parameters below.
6. Click **Send**.

Additional parameters for **overwrite**:

- `add_new_apex_users`
- `remove_memberships`
- `remove_empty_teams`
- `remove_teams`

Additional parameters for **update**:

- `add_new_apex_users`

Additional parameter details:

Name	Type	Description
csv_file	file	Required, .csv file of teams, team memberships
import_type	string	Required, <b>overwrite</b> or <b>update</b>
add_new_apex_users	boolean	True/false
remove_memberships	boolean	True/false (only with overwrite)
remove_empty_teams	boolean	True/false (only with overwrite)
remove_teams	boolean	True/false (only with overwrite)

To verify whether or not the .csv import was successful:

1. In the Flow app, click **Settings**.
2. Under User management, click **Teams**.
3. At the top of the page, a banner indicates the import's progress.
4. If the import was successful, click the link to view the results.

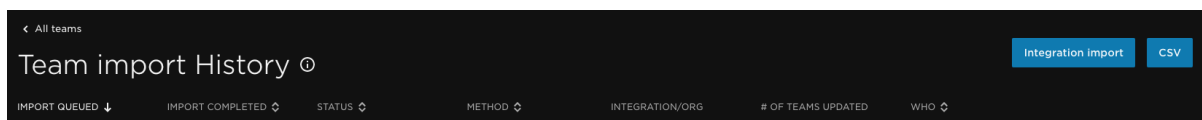
[back to top](#)

## Bulk importing teams via the Teams page

**Note:** If you're importing multi-tiered nested teams see the [Bulk importing multi-tiered nested teams](#) section below.

To bulk-import teams via the Teams page:

1. Click **Settings** in the top navigation in Flow.
2. Click **Teams** in the left navigation under User Management. This will take you to the **Team import history** page.
3. Click the **Integration import** button or the **CSV** button in the top right.



4. Click the **Choose File** button and select your .csv file.
5. Click the **Next** button once you've chosen your .csv file.



## Bulk Import Teams

Please choose a .csv file containing your users and teams to upload with the following criteria

[Learn more about bulk importing teams](#)

The CSV file should include the following columns:

Name	Email	TeamName	ParentTeamName	Membership Visibility	Membership Type

Example:

```
name,email,team_name,parent_team_name,view_rights,membership_type
Michael,user1@email.com,team1,,Yes,Contributor
Dwight,user2@email.com,team1,,No,Viewer
Jim,user3@email.com,team2,team1,
Pam,user4@email.com,team1,,No
Toby,user5@email.com,team1,Inherit,Viewer
```

No file chosen

Cancel

Next

6. Select the circle for **Update** or **Overwrite**.

- Update means that Flow adds the bulk imported teams to the ones you already set up in the Flow platform.

## Bulk Import Teams

Please choose a .csv file containing your users and teams to upload with the following criteria

Do you want us to completely overwrite your current teams, or just do an update?

Update  Add user if not found

Overwrite

[Back](#) [Next](#)

- Overwrite means the teams you had set up in Flow will be replaced with the ones you created within the .csv file. For the overwrite option, you can fine-tune what you want to keep and what you want to officially overwrite.

## Bulk Import Teams

Please choose a .csv file containing your users and teams to upload with the following criteria

Do you want us to completely overwrite your current teams, or just do an update?

Update

Overwrite

Add user if not found

Remove teams not in .csv file

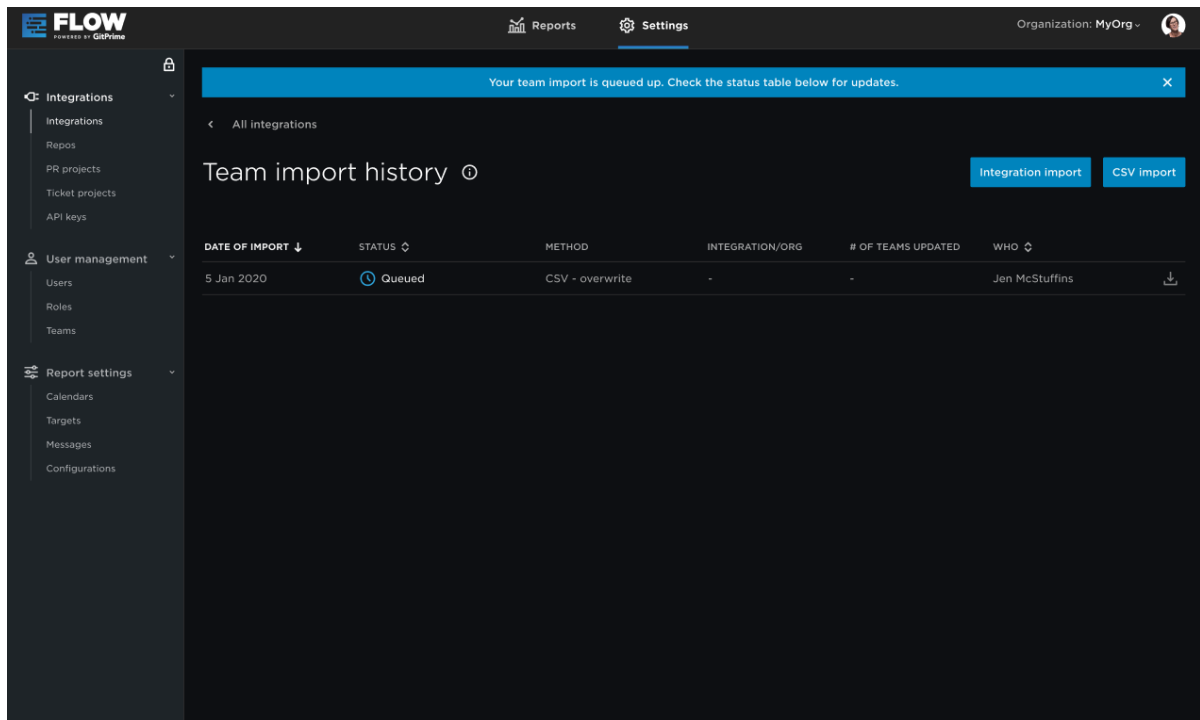
Remove memberships not in .csv file

Remove teams with no members

[Back](#) [Next](#)

**Note:** Selecting Update or Overwrite will display different checkbox options on the right side of the modal. You may check whichever options you wish to include.

7. Click **Next** once you finish selecting any additional options.
8. Double-check the settings you selected.
9. Click **Yes, Import** to confirm the import if your settings are correct. This starts the import and takes you to the Team import history page.



10. Check the status of your recent import.

- If there were no errors in the .csv and the import was successful, a success message appears in the status column.
- If there are errors in the import, an error message appears in the status column.

If there are errors in the import, Flow creates an updated .csv file stating any errors during the import process. Click the **download** button on the right side to download a copy of the updated .csv file.

Rectify the errors and reupload the .csv file to complete the process.

[back to top](#)

## Bulk importing multi-tiered nested teams

When importing teams that include multiple nested team levels, use the parent\_team column to associate the nested team to the most immediate parent\_team.

**Tip:** If one or multiple parent teams has nested users but no native users, you may need to add a fake user to the empty team in order to recreate the hierarchy.

Alternatively, manually create any empty team once you've imported your file, then nest the nested teams. To learn how to manually nest teams, see the Nesting a team section of [How to create teams](#).

Example Team Structure:

- King of the Castle: 0 users, 10 nested users

- Front End: 0 users, 10 nested users
- FE A: 2 users, 0 nested users
- FE B: 1 users, 2 nested users
- FE B1: 2 users, 0 nested users

In the above team structure, the top two team levels, King of the Castle and Front End, do not have any native users.

In this case, Flow creates the Front end team because of its immediate association to its nested teams, FE A and FE B. The main parent team, King of the Castle, must be added manually.

Alternatively, a user must be added to either the King of the Castle or to the Front End team.

The image below shows what the file looks like without adding an additional user, fake or otherwise:

	A	B	C	D	E	F
1	<b>name</b>	<b>email</b>	<b>team_name</b>	<b>parent_team_name</b>	<b>view_rights</b>	<b>membership_type</b>
2	John Doe	<a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a>	FE A	Front End	yes	contributor
3	J Deer	<a href="mailto:jdeer@mycompany.com">jdeer@mycompany.com</a>	FE A	Front End	no	contributor
4	Tori Fischer	<a href="mailto:tfischer@mycompany.com">tfischer@mycompany.com</a>	FE B	Front End	yes	contributor
5	R Saba	<a href="mailto:rsaba@mycompany.com">rsaba@mycompany.com</a>	FE B1	FE B	inherit	contributor
6	Luke Roger	<a href="mailto:lroger@mycompany.com">lroger@mycompany.com</a>	FE B1	FE B	inherit	contributor

To create the top-level team, add the team to the file:

	A	B	C	D	E	F
1	<b>name</b>	<b>email</b>	<b>team_name</b>	<b>parent_team_name</b>	<b>view_rights</b>	<b>membership_type</b>
2	John Doe	<a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a>	FE A	Front End	yes	contributor
3	J Deer	<a href="mailto:jdeer@mycompany.com">jdeer@mycompany.com</a>	FE A	Front End	no	contributor
4	Tori Fischer	<a href="mailto:tfischer@mycompany.com">tfischer@mycompany.com</a>	FE B	Front End	yes	contributor
5	R Saba	<a href="mailto:rsaba@mycompany.com">rsaba@mycompany.com</a>	FE B1	FE B	inherit	contributor
6	Luke Roger	<a href="mailto:lroger@mycompany.com">lroger@mycompany.com</a>	FE B1	FE B	inherit	contributor
7	Robert Sanchez	<a href="mailto:rsanchez@mycompany.com">rsanchez@mycompany.com</a>	King of the Castle		yes	viewer
8	Robert Sanchez	<a href="mailto:rsanchez@mycompany.com">rsanchez@mycompany.com</a>	Front End	King of the Castle	yes	viewer

- Line 7 adds a user directly to the top parent team.
- Line 8 adds a user directly to the Front End team, thereby associating Front End to the parent\_team.

Once you have your team structure mapped out in your file, follow the steps in the previous sections to upload and import it.

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If you need help, please contact [Pluralsight Support](#).