Managing users via CSV

Tags: **Skills**

You can manage the users on your plan right in the Skills platform.

However, if you're managing large organizations, you can use a CSV upload to simplify the process and reduce human error.

In this article

Who can use this?

	Stnd	Prem	Strt	Pro	Ent
Learners:					
Managers:					
Admins:			✓	✓	✓

Tip: See also APIs and integrations to learn how to leverage APIs to manage your users.

Adding new users

Whether you're just starting to set up users in Skills or wanting to add new users to your plan, you can use a CSV template to add them. You can add learners, team managers, and plan admins during the same upload.

Creating a custom template

1. On the **Directory** tab of the People page (opens in new tab), click the **Download** icon.
2. Click **Download all users in CSV import template**.
3. Open this file in your spreadsheet program.
4. Delete all rows except the header row. Do not alter or reorder the column names in the header row.
5. Save the CSV template for future use. We recommend adding "template" and a date/time stamp to the filename for easy identification.
6. To avoid confusion, delete any previous templates you may have saved.

> **Note:** This template will be unique to your plan and will include the license types your plan has purchased. It will be accurate at the time you create it, using the steps above.
>
> If, in the future, you change or purchase different license types, you'll need to create a new custom template for future CSV uploads.

Populating your custom template

1. Open your custom template in your spreadsheet program. See Creating a custom template above if you need to create or refresh your template—for example, if you changed or purchased different license types since your last upload.
2. Do not alter or reorder the column names in the header row.
3. Populate the following columns of the spreadsheet for each new user, using one row per user:
    - **PlanUserId:** Leave this blank when adding new users.
    - **Email:** Enter the primary email address.
    - **Note:** If desired, enter an employee ID or other identifier.
    - **Teams:** If desired, enter one or more teams to assign the user to. Separate multiple teams with a semicolon, if applicable.
    - **IsAdmin:** Enter “TRUE” to make the new user an admin; enter “FALSE” or leave blank otherwise.
    - **IsManager:** Enter “TRUE” to make the new user a team manager; enter “FALSE” or leave blank otherwise. If you enter “TRUE”, you must also complete the **TeamsManaged** field.
    - **ManagerPermission:** If the user will be a team manager, enter their permission level, or leave this blank to use the plan’s default permission level. Choices include “Basic”, “Limited”, or “Full”. See Managing team managers to learn about each of these permission levels. Leave this blank if not applicable (not a manager).
    - **TeamsManaged:** If the user will be a team manager, enter one or more teams they'll manage. Separate multiple teams with a semicolon, if applicable. Leave this blank if not applicable (not a manager).
    - **[Plan and add-on license types]:** Between the **TeamsManaged** and the **Action** columns, you'll find one or more plan and add-on license type columns, which are unique to your plan. Enter “TRUE” for each license you wish to assign; enter “FALSE” or leave blank otherwise (entering “FALSE” or leaving this field blank has the same effect). Please see the tip below to avoid creating unlicensed users.
    - **Action:** If you wish to send an automated invitation to the new user, enter “Invite”. Leave this blank otherwise.
4. Follow the instructions below to import your completed CSV.

> **Tips:**
>
> - **Manager permission:** To find your current manager permission level, click **Configure** on the **Managers** tab of the People page (opens in new tab).

- **Skills license types:**
  - **Learners:** If both the **IsAdmin** and **IsManager** fields are “FALSE” or blank (i.e., for a standard learner), you must assign at least one plan license to avoid creating an unlicensed user.
  - **Leaders:** Plan admins and team managers don’t need a Skills license to manage their team or curate content in channels. But without a license, they can’t watch content. Licenses can be assigned later, if needed.
  - **Available licenses:** You must purchase licenses before you can assign them to users. You can find the number and type of licenses available to your plan on the **Plan** tab of your Account page (opens in new tab).
  - **Plan licenses vs. add-on licenses:** There's currently one add-on license type available to purchase for your Skills plan: **Labs**. All other licenses are considered plan licenses. You must assign users a plan license in order to assign them an add-on license.
  - **Legacy Tech Foundations plans:** Legacy plans required Tech Foundations licenses to either be purchased as a stand-alone plan, or as an add-on to a Skills plan. Current plans, however, allow you to purchase Tech Foundations as a plan license, allowing greater flexibility in customizing licenses on your plan. If you wish to convert a legacy Tech Foundations plan to a current plan, please speak with your Pluralsight contact.
- **Batch size:** Limit your CSV to 1,000 rows for a successful upload. If you need to add more than 1,000 rows, upload multiple CSVs.

back to top

Editing or removing existing users

If you already have users set up in Skills, you can download a CSV of all users on your plan, make your edits, and then upload your edited CSV to the platform.

1. On the **Directory** tab of the People page (opens in new tab), click the **Download** icon.
2. Click **Download all users in CSV import template**.
3. Save the CSV file as a backup in case you need to revert to the original state. We recommend adding “original” and a date/time stamp to the filename for easy identification.
4. Make a copy of the file with a unique filename. This is the copy you’ll use to make your edits and, eventually, import back into Skills.
5. See the respective instructions below to edit users or remove users.
6. When finished, follow the instructions below to import your completed CSV.

Tips:

- When importing, Skills will only update users (rows) that have been modified from the CSV you downloaded—and that include “Update” or "Remove" in the **Action** column.
- Skills will ignore the following:
  - Blank cells
  - Cells with no changes

- Rows that you remove entirely
- Rows that do not include “Update” or "Remove" in the **Action** column

- To help reduce human error and ensure that Skills will ignore them, we recommend:
  - Deleting the contents of any cells that you don't wish to modify
  - Deleting any entire rows that you don't wish to modify
- For example, if you’re updating a user’s team, the only columns that you need to populate are **PlanUserID**, **Team**, and **Action**.

Editing users

- Do not alter or reorder the column names.
- Do not alter or delete the value in the **PlanUserId** column. This is a system-generated field used to uniquely identify a user.
- You can edit any of the following fields. See Adding new users above for descriptions of these fields.
  - Email
  - Note
  - Teams
  - IsAdmin
  - IsManager
  - ManagerPermission
  - TeamsManaged
  - [Plan and add-on license types]—unique to your plan
- Enter “Update” in the **Action** column for each user (row) you have modified.

Tips:

- To remove a user from all assigned teams, enter “Unassign” in the **Teams** column.
- If you want to remove the user from your plan, don’t just remove their license(s). This will create an unlicensed user which will remain on your plan. Instead, follow the steps below for removing users.

Removing users

A learner's account will remain tied to the team plan until a plan admin removes it, or until the learner asks Pluralsight Support to remove it. If all you do is remove their license(s), they’ll remain on your plan as an unlicensed user.

Learners can buy an individual subscription and continue learning with their account. However, they cannot buy an individual subscription or be added to a team plan while their account is tied to your team plan. This still applies if your plan has expired or if the learner’s license has been removed.

Follow these steps to remove admins, team managers, licensed users, and unlicensed users from your team plan:

- Do not alter or reorder the column names.
- Do not alter or delete the value in the **PlanUserId** column. This is a system-generated field used to uniquely identify a user.
- Enter “Remove” in the **Action** column for any users you wish to remove from the plan.

> **Note:** The following will happen when you remove a user:
>
> - The user will be removed from your plan.
> - The user will lose their plan license(s) and any add-on licenses—along with any admin or manager permissions—they were assigned under your plan.
> - Any licenses they had been assigned—with the exception of non-transferrable certification add-ons—will be returned to your bank of unassigned licenses.
> - Admins and managers on your plan will lose visibility to some analytics data for the removed users. See How analytics data follows learners to learn more.
> - The user’s Pluralsight account will remain intact, including their course history, profile settings, and any personal channels they have created. If, in the future, you re-invite them to the plan, they join another organization’s team plan, or they get their own individual subscription, they will retain access to their account—as long as they still have access to one of the email addresses associated with it. For this reason, we recommend that users add a personal email in addition to their primary email address.
>
> For additional information on what happens when a user is removed from a plan, see Pluralsight Skills individual accounts and team plans.

back to top

Importing your CSV

Whether adding, editing, or removing users, you must upload your CSV when you’re done with your edits.

1. After editing your CSV file, save your changes and close it.
2. On the **Directory** tab of the People page (opens in new tab), click **Import CSV**.
3. Click **Choose file** and navigate to and select your CSV file.
4. Click **Upload** to import your file.

See the next section to learn how to confirm your upload.

back to top

Confirming your upload

When you upload your CSV, Skills will automatically download a confirmation CSV showing you the results of the upload. Check the **Message** column of the confirmation CSV to make sure the changes to each row were successful.

If the **Message** column contains “Success”, the respective row was updated successfully.

Any other value in this column indicates a failure for that row. An error in any column will result in failure for the entire row; no partial changes will be made.

If you need help, please contact Pluralsight Support.