

# Account Import Guide

## Article Number

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## Information

The import process allows you to bulk create accounts and update user information. This allows you to upload user data that you already have on file, like Card IDs, demographic information, and more. You do not have to create accounts through an import in order for a user to sign in, but it does allow you to pre-populate information. This stores user's information in the system which will then be available in reports. It also saves user's time because they are not required to complete information already stored.

The import process is easy and breaks down into a couple of steps:

1. First, download the **User Import Template** file below.
2. Work with your registrar or records office to populate the import file with your user information. See the rest of this article for help with this process.
3. Upload your import file to our [transfer site](#) using your campus's SFTP credentials.
4. Contact [Support](#) to let us know that the file is ready to be processed, or if you need your SFTP credentials. *Do not send your file to this address* - we always want to ensure that student information is sent securely. You may choose to carbon copy (CC) your Consultant to keep them in the loop.

## The Import Template File

The same import template is used to both create new accounts and to update user information. You can import everything from basic information, such as name and email, to other fields like demographic information or enrollment status. Check the import file headers for the complete list of importable fields.

When populating the import file, keep in mind these important reminders:

- **Do not alter the template headers.** These headers are predefined and if they are changed, the import file will not process.
- **Ensure your data is formatted properly.** Specific fields have specific formatting requirements. Check the **Engage User Import Field Specifications** document below for the complete list of these requirements.
- **Verify that your import file is encoded as UTF-8.** Other encoding types are not supported, and can lead to incorrect characters being displayed in Engage.

*If you do not format your import file correctly, it could lead to incorrect data or a delay in the processing of the import file. Please make sure to check the file before passing it to Support.*

## Creating New Accounts

When creating or importing accounts, you are required to provide the following fields. If any of these fields are missing or empty, the user will not be imported:

- **Action**
- **Username**
- **CampusEmail**

Feel free to provide as many other fields in the import as you would like (according to the standards discussed above).

## Updating Information on Existing Accounts

Updating existing accounts uses the same import template. If you are updating existing accounts, you must identify how you'd like to update the data. As an example, you may run into a situation where you want to completely replace all of the user data in the system. Down the road, you may want to only update specific fields. In these two examples, the **Action**, or method for updating the data is different. The available Actions are:

- **Update:** Replace the data in the system with the data on your import file. Blank fields on your import file are ignored and will *not* replace existing data in the system.
- **Append:** Only update the data in the system if it currently has a blank value. Data on the import file will **not** be added if there is currently a value for that field in the system.
- **Overwrite:** Completely replace the data in the system with the data on your import file. Unlike Update, this *will not ignore blanks*. If you use Overwrite, expect whatever is in the system to match the data provided on your import file – blanks and all.

Regardless of the Action type chosen, if the Username value is not already assigned to an Engage user, a new User record will attempt to be created.

If the Action is blank, the system assumes you're trying to import a new account. This can cause the record to fail to import if the Username or CampusEmail values provided already exist in Engage. For that reason, we recommend that you use the Update action for most purposes.

This process cannot be used to change usernames. To change existing usernames, contact Support.

## Action Examples

### Update

*Only populated fields on the import file affect the data in the system. Blanks do not replace anything.*

	Username	Legal First Name	Legal Last Name	Campus Email	Mobile Phone	Class Standing
<b>Data pre-import</b>	alice12	Alice	Appleton	alice12@hometown.edu	555-962-2305	
<b>Import file</b>	alice12	Alice	David	alice12@hometown.edu		Sophomore
<b>Append post-import</b>	alice12	Alice	David	alice12@hometown.edu	555-962-2305	Sophomore

*Only fields that are updated are the ones that were previously blank in the system.*

	Username	Legal First Name	Legal Last Name	Campus Email	Mobile Phone	Class Standing
<b>Data pre-import</b>	bob387	Bob	Boucher	bb387@hometown.edu		
<b>Import file</b>	bob387	Bob	Thomas	bb387@hometown.edu	972-555-2943	Senior
<b>Overwrite</b>	bob387	Bob	Boucher	bb387@hometown.edu	972-555-2943	Senior

**Post-import** file replaces everything in the system – blanks and all.

	<b>Username</b>	<b>Legal First Name</b>	<b>Legal Last Name</b>	<b>Campus Email</b>	<b>Mobile Phone</b>	<b>Class Standing</b>
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<b>Data pre-import</b>	carl90	Carl	Edwards	robert@hometown.edu	214-555-9000	Junior
<b>Final Steps</b>	carl90	Carl	Abraham	bob@hometown.edu		

**Data post-import**  
When you are finished with your template, reach out to the support team at [support@campuslabs.com](mailto:support@campuslabs.com). They will help you complete the secure file transfer process. If you are looking for more information about the Import Automation process, please read our [Engage Import Automation](#) article.

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### KB Product

Engage

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