



Evolvi Resource Manager (ERM)

Version 1.2

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1. Introduction

1.1 What is Evolvi Resource Manager?

Evolvi Resource Manager (ERM) is an Application that allows you to upload, amend and cancel users in Evolvi.

1.2 What browsers are supported?

You can use this application on the following platforms.

| Browser | Version |
|--|---|
| Google Chrome  | v63+ |
| Internet Explorer  | IE 11 (only) |
| Microsoft Edge  | Microsoft Edge v41+ Microsoft Edge HTML v16+ |

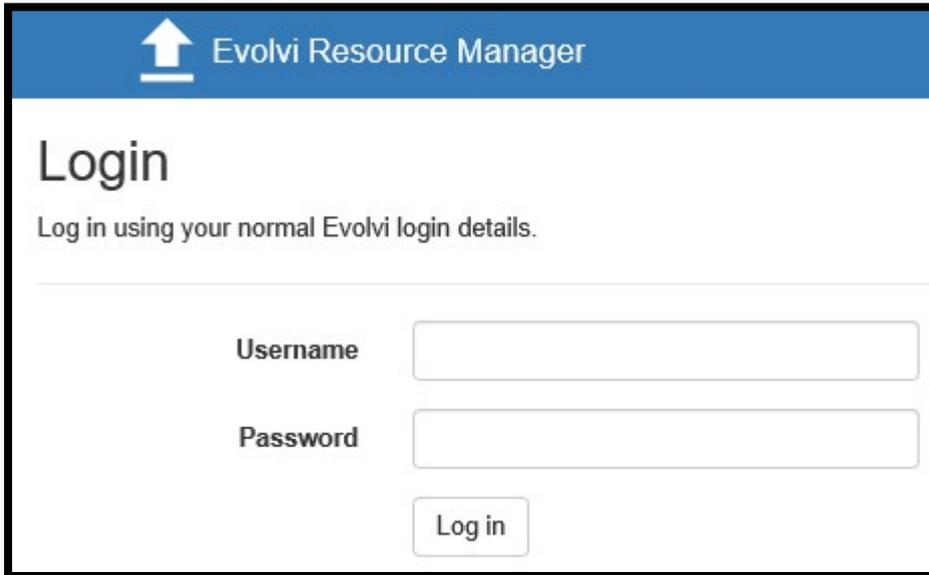
1.3 How does it work?

The Evolvi Resource Manager Application allows users to make bulk changes to user profiles by uploading CSV files. Each action has a carefully written process which is detailed further in this user guide.

2. The Application

2.1 Signing Into Your Account

Upon launching the application via your chosen web browser, you should be presented with the below screen.



The screenshot shows the login interface for the Evolvi Resource Manager. At the top, there is a blue header with a white upward-pointing arrow icon and the text "Evolvi Resource Manager". Below the header, the word "Login" is displayed in a large, bold font. Underneath "Login", the instruction "Log in using your normal Evolvi login details." is shown. The main form area contains two input fields: "Username" and "Password", each with a corresponding text box. Below these fields is a "Log in" button.

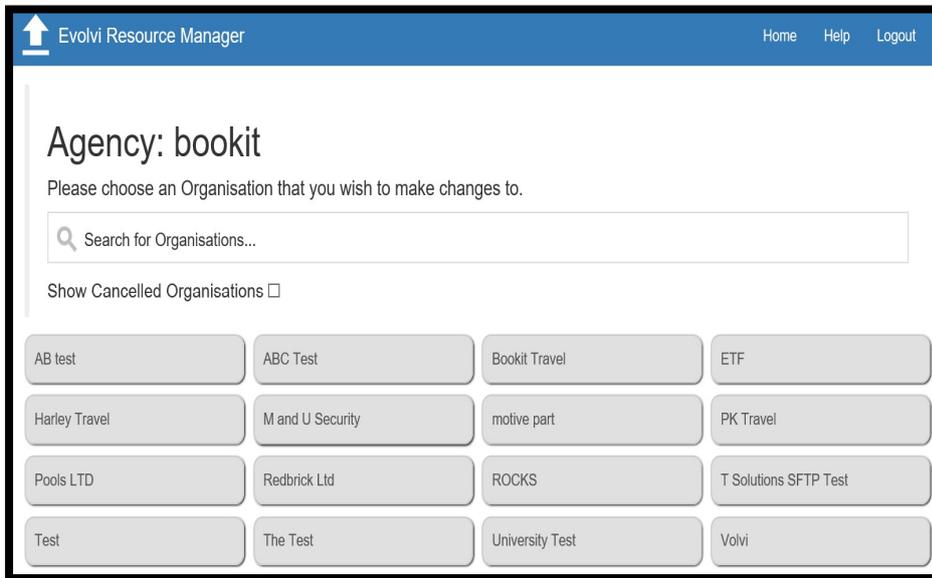
To Login enter your existing Evolvi Username and Password into the login form and press the "Log In" button.

NOTE: Your organisation will need to be set up to use the System before you are able to login. Please email the Evolvi Helpdesk on support@evolvi.co.uk to set up your organisation to use this System. In addition, your user profile must have a Policy Group that has these policies enabled:

- **Manage Users**
- **Manage Organisations**

2.2 App Overview

Upon successful login you will be presented with the agency home page screen, similar to the below.



The menu bar will be available at the top of the window at all times. The menu bar includes three links.

Home -The "Home" link will return you to the Agency home page.

Help - The "Help" link will open this user guide in a new tab.

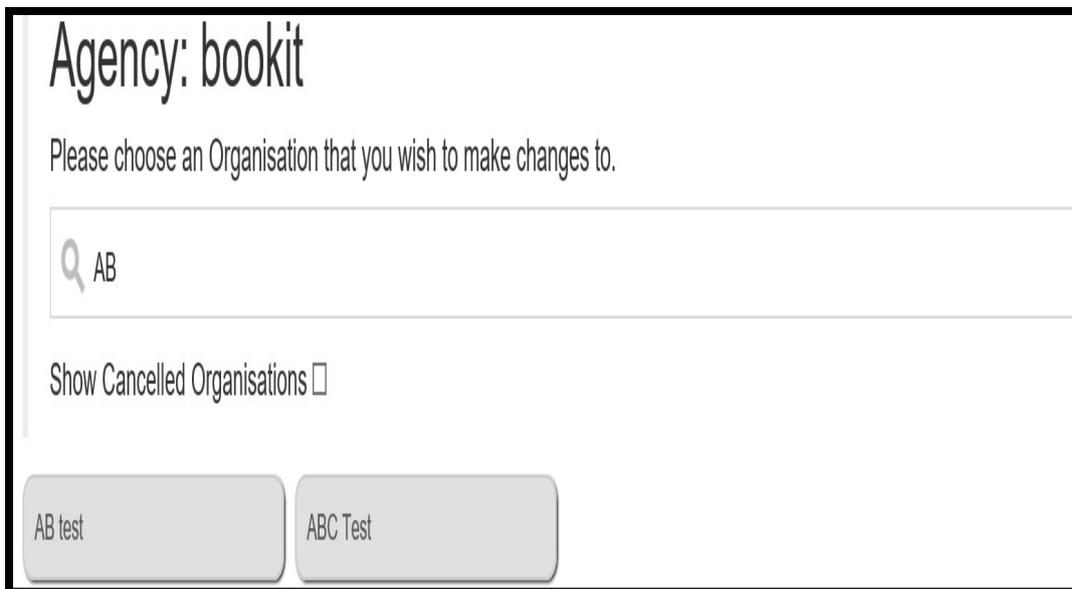
Logout - Clicking "Logout" will log you out of ERM.

3. Select Organisation

Before uploading any user profiles or downloading any templates, the appropriate organisation must be selected.

3.1 Search Organisations

Using the search bar you can locate a specific organisation name, the results will filter automatically as you type to the nearest matches based on the text entered.



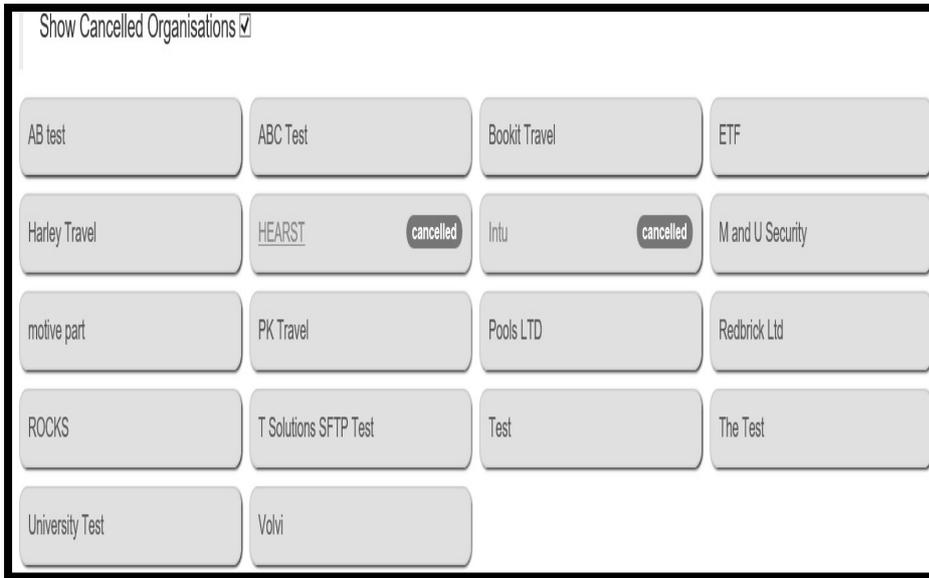
The screenshot shows a search interface for organisations. At the top, it says "Agency: bookit". Below that is a prompt: "Please choose an Organisation that you wish to make changes to." There is a search input field containing a magnifying glass icon and the text "AB". Below the search field is a checkbox labeled "Show Cancelled Organisations". At the bottom, there are two buttons: "AB test" and "ABC Test".

Removing text from the box (so only the spy glass icon shows in the field) will revert your home page to show all organisations.

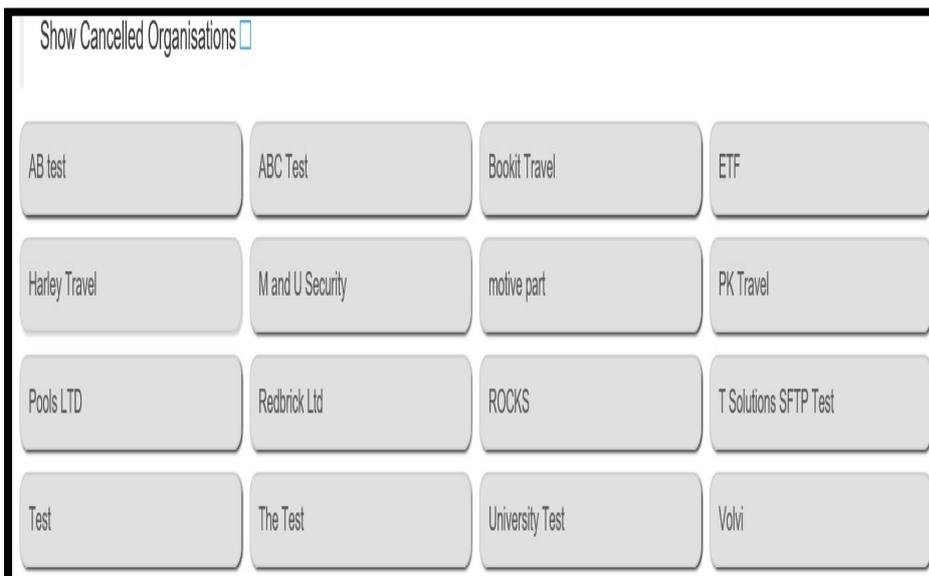
3.2 View Cancelled Organisations

You can view but **cannot** make any changes to cancelled organisations.

Select the check box for ‘Show Cancelled Organisations’ on the home page.



Unchecking the box will return the menu to ‘active’ organisations only.

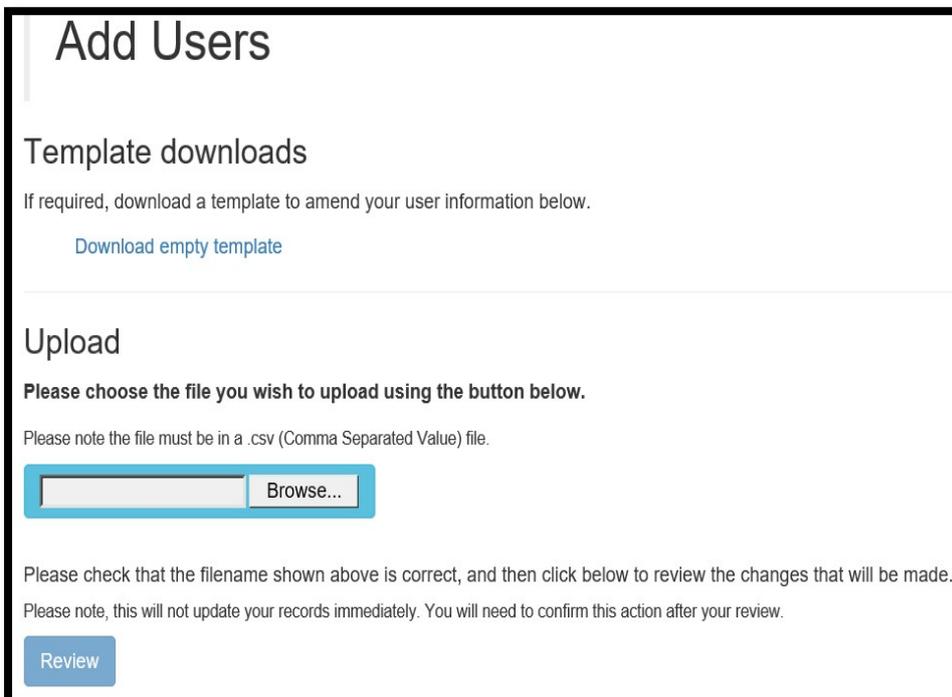


4. Add Users

Having selected an organisation, select the 'add users' button from the menu.



Once selected you will be taken to the following page.

A screenshot of a web page titled 'Add Users'. The page has a white background and a black border. At the top left, the title 'Add Users' is displayed in a large, bold, black font. Below the title, the section 'Template downloads' is shown. Under this section, there is a line of text: 'If required, download a template to amend your user information below.' Below this text is a blue link that says 'Download empty template'. A horizontal line separates this section from the 'Upload' section. The 'Upload' section has a bold heading 'Upload' followed by the instruction 'Please choose the file you wish to upload using the button below.' Below this is another line of text: 'Please note the file must be in a .csv (Comma Separated Value) file.' Underneath is a file upload control consisting of a light gray text input field and a blue button labeled 'Browse...'. Below the file control, there is more text: 'Please check that the filename shown above is correct, and then click below to review the changes that will be made.' and 'Please note, this will not update your records immediately. You will need to confirm this action after your review.' At the bottom of the page is a blue button labeled 'Review'.

4.1 Downloading an Empty Template

NOTE: If you already have a file for upload skip to [4.2 Uploading File](#) to continue.

Select “Download empty template” this will give you an empty CSV file formatted for this organisation, which will be accepted by the system for uploads. The filename default is **OrganisationName_Upload_DateOfDownload**.



Below example of the template.

The image shows an Excel spreadsheet with the following columns: A (Username), B (Organisation), C (Unit), D (PolicyGroup), E (DefaultAccount), F (Title), G (Forename), H (Surname), I (Address1), J (Address2), K (Address3), L (Address4), M (Address5), N (City), O (County), P (Postcode), Q (Telephone), R (AdditionalConfirmationEmail), S (Password), T (ForcePasswordChange), and U (AccessType). The first row contains these headers, and the following three rows are empty.

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U |
|---|----------|--------------|------|-------------|----------------|-------|----------|---------|----------|----------|----------|----------|----------|------|--------|----------|-----------|-----------------------------|----------|---------------------|------------|
| 1 | Username | Organisation | Unit | PolicyGroup | DefaultAccount | Title | Forename | Surname | Address1 | Address2 | Address3 | Address4 | Address5 | City | County | Postcode | Telephone | AdditionalConfirmationEmail | Password | ForcePasswordChange | AccessType |
| 2 | | | | | | | | | | | | | | | | | | | | | |
| 3 | | | | | | | | | | | | | | | | | | | | | |

NOTE: default columns are as shown

Username, Organisation, Unit, PolicyGroup, DefaultAccount, Title, Forename, Surname, Address1, Address2, Address3, Address4, Address5, City, County, Postcode, Telephone, AdditionalConfirmationEmail, Password, ForcePasswordChange and AccessType – Customized Fields will also be included as columns where applicable.

Once you have populated the sheet save it as a CSV and proceed to uploading the file.

4.2 Uploading File

Browse to the file and upload it as instructed.

NOTE: uploaded files must contain under 10,000 rows and be less than 3 Mb in size.

Upload

Please choose the file you wish to upload using the button below.

Please note the file must be in a .csv (Comma Separated Value) file.

Upon successful file selection the 'review' button will become available and the path of your chosen file should appear in the upload field.

Upload

Please choose the file you wish to upload using the button below.

Please note the file must be in a .csv (Comma Separated Value) file.

Please check that the filename shown above is correct, and then click below to review the changes that will be made.

Please note, this will not update your records immediately. You will need to confirm this action after your review.

NOTE: only one file can be loaded at a time, if another file is selected the field is populated with the latest chosen file.

If you are happy with your selection proceed by pressing ‘Review’.

Providing no errors have been found with your file you will be presented with a success screen similar to below.

Review Additions

✔ Upload is ready to submit.

File Review

Download the data from the table below, including feedback.

Download file feedback

Table Key: No value/No Change New value Warning Error in Value Value will be ignored

| Feedback | Username | Organisation | Unit | PolicyGroup | DefaultAccount | Title | Forename | Surname | Address1 | Address2 | Address3 | Address4 | Address5 | City | County | Postcode | Telephone |
|----------|---------------------|---------------|---------------|----------------------|----------------|-------|----------|-----------|----------|----------|----------|----------|----------|--------|----------|-----------|--------------|
| | testuser2@email.com | Bookit Travel | Bookit Travel | Agency Administrator | Bookit 1 | Mr | A | Traveller | House | Street2 | Street2 | Street2 | Street2 | A City | B County | POST CODE | 01234 567890 |
| | testuser3@email.com | Bookit Travel | Bookit Travel | Agency Administrator | Bookit 1 | Mrs | A | Traveller | House | Street3 | Street3 | Street3 | Street3 | A City | B County | POST CODE | 01234 567890 |
| | testuser4@email.com | Bookit Travel | Bookit Travel | Agency Administrator | Bookit 1 | Mr | A | Traveller | House | Street4 | Street4 | Street4 | Street4 | A City | B County | POST CODE | 01234 567890 |
| | testuser5@email.com | Bookit Travel | Bookit Travel | Agency Administrator | Bookit 1 | Mr | A | Traveller | House | Street5 | Street5 | Street5 | Street5 | A City | B County | POST CODE | 01234 567890 |
| | testuser6@email.com | Bookit Travel | Bookit Travel | GuestBooker | Bookit 1 | Mrs | A | Traveller | House | Street6 | Street6 | Street6 | Street6 | A City | B County | POST CODE | 01234 567890 |
| | testuser7@email.com | Bookit Travel | Bookit Travel | Approval Required | Bookit 1 | Mr | A | Traveller | House | Street7 | Street7 | Street7 | Street7 | A City | B County | POST CODE | 01234 567890 |

At this point it is important to review the information displayed in the table. The table shows the net result that the upload will have on any existing data, with new and changed data highlighted as well as any erroneous data, warnings or fields which will be blank once the data is uploaded.

NOTE: If you encounter any errors refer to the following section [8. Troubleshooting](#)

4.3 Submit File

If you are happy with the results proceed to submitting the changes via the ‘submit’ button which is located at the bottom of the page.

Submission

If you are happy with the changes detailed above please submit these changes now.

Submit Changes

NOTE: ERM will not allow you to upload a file containing errors.

As the file is uploading you will see a progress bar.

Adding Users

Stop

NOTE: the process can take a few minutes depending on how many records are being updated.

Once the progress bar becomes full the below screen appears upon completion.

Review Additions

✔ Update Complete.

[Return to Organisation: Bookit Travel](#)

File Review

Download the data from the table below, including feedback.

[Download file feedback](#)

Table Key: No value/No Change New value Warning Error in Value Value will be ignored

| Feedback | Username | Organisation | Unit | PolicyGroup | DefaultAccount | Title | Forename | Surname |
|----------|---------------------|---------------|---------------|----------------------|----------------|-------|----------|-----------|
| ✔ | testuser2@email.com | Bookit Travel | Bookit Travel | Agency Administrator | Bookit 1 | Mr | A | Traveller |
| ✔ | testuser3@email.com | Bookit Travel | Bookit Travel | Agency Administrator | Bookit 1 | Mrs | A | Traveller |

You have successfully bulk uploaded users to the system! To return to the organisation page select the green highlighted button.

If you need to do the process again with another organisation, select the home button in the top right corner and follow the same steps to complete the upload.

Home
Help
Logout

5. Update Users

Having selected an organisation, select the 'Update users' button from the menu.



You will be presented with the following screen.

Update Users

Template downloads

If required, download a template to amend your user information below.

[Download empty template](#)
[Download populated template](#)

Upload

Please choose the file you wish to upload using the button below.

Please note the file must be in a .csv (Comma Separated Value) file.

Browse...

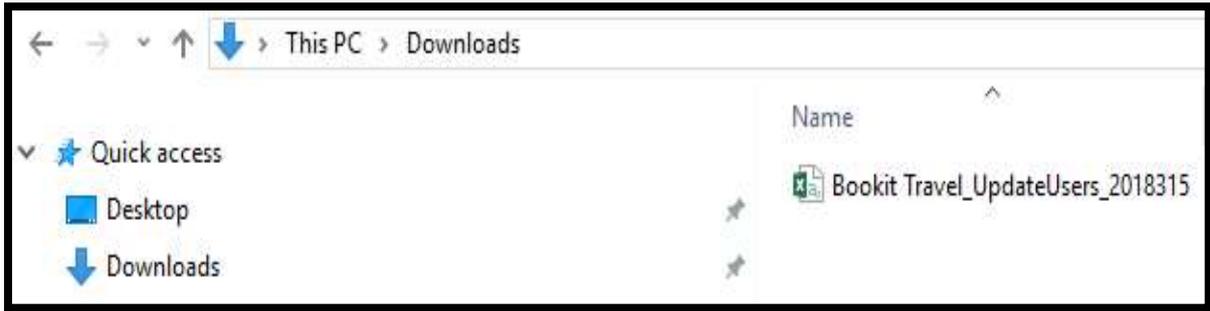
Please check that the filename shown above is correct, and then click below to review the changes that will be made.
 Please note, this will not update your records immediately. You will need to confirm this action after your review.

Review

5.1 Downloading an Empty Template

NOTE: If you already have a file for upload skip to [5.3 Uploading File](#) to continue.

Select "Download empty template" this will give you an empty CSV file formatted for this organisation, which will be accepted by the system for uploads. The filename default is **OrganisationName_Update_DateOfDownload**.



Below example of the template.

| Username | Unit | PolicyGroup | DefaultAccount | Title | Forename | Surname | Organisation | Address1 | Address2 | Address3 | Address4 | Address5 | City | County | Postcode | Telephone | AdditionalConfirmationEmail | Password | ForcePasswordChange | AccessType |
|----------|------|-------------|----------------|-------|----------|---------|--------------|----------|----------|----------|----------|----------|------|--------|----------|-----------|-----------------------------|----------|---------------------|------------|
| | | | | | | | | | | | | | | | | | | | | |

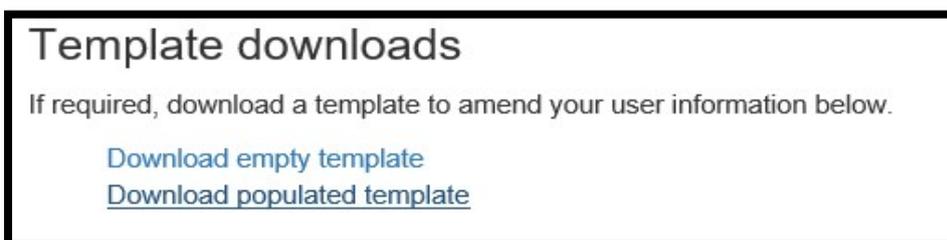
NOTE: default columns are as shown

Username, Organisation, Unit, PolicyGroup, DefaultAccount, Title, Forename, Surname, Address1, Address2, Address3, Address4, Address5, City, County, Postcode, Telephone, AdditionalConfirmationEmail, Password, ForcePasswordChange and AccessType – Customized Fields will also be included as columns where applicable.

Once the information you require to be changed is populated save as a CSV then proceed to [5.3 Uploading File](#).

5.2 Downloading a Populated Template

During the initial template selection you will see an option to ‘Download Populated’ Template.



By selecting this option you will receive a downloaded copy of ‘all users’.

| Username | Unit | PolicyGroup | DefaultAccount | Title | Forename | Surname | Organisation | Address1 | Address2 | Address3 | Address4 | Address5 |
|----------------------|---------------|---------------|----------------------|-------|------------|-----------|--------------|-----------|-----------|-----------|-----------|-----------|
| Usertest1@test.com36 | Bookit Travel | Bookit Travel | Agency Administrator | FAO | Forename36 | Surname36 | Helpdesk | Address37 | Address38 | Address39 | Address40 | Address41 |
| Usertest1@test.com37 | Bookit Travel | Bookit Travel | Agency Administrator | FAO | Forename37 | Surname37 | Helpdesk | Address38 | Address39 | Address40 | Address41 | Address42 |

NOTE: Further information regarding the purpose of this function can be found here [7.User Reports](#)

5.3 Uploading File

Browse to the file and upload it as instructed.

NOTE: uploaded files must contain under 10,000 rows and be less than 3 Mb in size.

Upload

Please choose the file you wish to upload using the button below.

Please note the file must be in a .csv (Comma Separated Value) file.

Upon successful file selection the 'review' button will become available and the path of your chosen file should appear in the upload field.

Upload

Please choose the file you wish to upload using the button below.

Please note the file must be in a .csv (Comma Separated Value) file.

Please check that the filename shown above is correct, and then click below to review the changes that will be made.
Please note, this will not update your records immediately. You will need to confirm this action after your review.

Review

If you are happy with your selection proceed by pressing 'Review'.

Providing no errors have been found with your file you will be presented with a success screen similar to below.

Review Additions

Upload is ready to submit.

File Review

Download the data from the table below, including feedback.

[Download file feedback](#)

Table Key: No value/No Change New value Warning Error in Value Value will be ignored

| Feedback | Username | Organisation | Unit | PolicyGroup | DefaultAccount | Title | Forename | Surname | Address1 | Address2 | Address3 | Address4 | Address5 | City | County | Postcode | Telephone |
|----------|---------------------|---------------|---------------|----------------------|----------------|-------|----------|-----------|----------|----------|----------|----------|----------|--------|----------|-----------|--------------|
| | testuser2@email.com | Bookit Travel | Bookit Travel | Agency Administrator | Bookit 1 | Mr | A | Traveller | House | Street2 | Street2 | Street2 | Street2 | A City | B County | P0ST C0DE | 01234 567890 |
| | testuser3@email.com | Bookit Travel | Bookit Travel | Agency Administrator | Bookit 1 | Mrs | A | Traveller | House | Street3 | Street3 | Street3 | Street3 | A City | B County | P0ST C0DE | 01234 567890 |
| | testuser4@email.com | Bookit Travel | Bookit Travel | Agency Administrator | Bookit 1 | Mr | A | Traveller | House | Street4 | Street4 | Street4 | Street4 | A City | B County | P0ST C0DE | 01234 567890 |
| | testuser5@email.com | Bookit Travel | Bookit Travel | Agency Administrator | Bookit 1 | Mr | A | Traveller | House | Street5 | Street5 | Street5 | Street5 | A City | B County | P0ST C0DE | 01234 567890 |
| | testuser6@email.com | Bookit Travel | Bookit Travel | GuestBooker | Bookit 1 | Mrs | A | Traveller | House | Street6 | Street6 | Street6 | Street6 | A City | B County | P0ST C0DE | 01234 567890 |
| | testuser7@email.com | Bookit Travel | Bookit Travel | Approval Required | Bookit 1 | Mr | A | Traveller | House | Street7 | Street7 | Street7 | Street7 | A City | B County | P0ST C0DE | 01234 567890 |

At this point it is important to review the information displayed in the table. The table shows the net result that the upload will have on any existing data, with new and changed data highlighted as well as any erroneous data, warnings or fields which will be blank once the data is uploaded.

NOTE: If you encounter any errors refer to the following section [8. Troubleshooting](#)

5.4 Submit File

If you are happy with the results proceed to submitting the changes via the ‘submit’ button which is located at the bottom of the page.

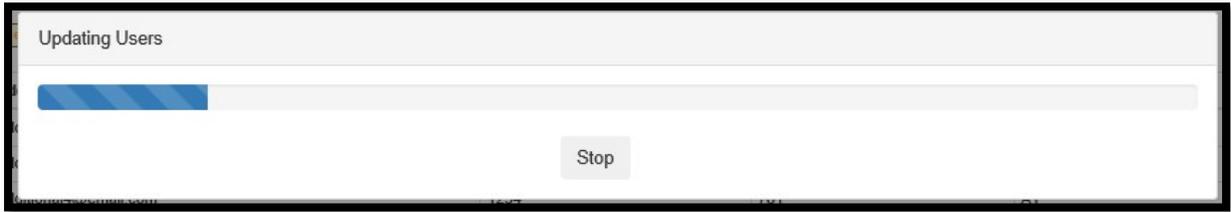
Submission

If you are happy with the changes detailed above please submit these changes now.

[Submit Changes](#)

NOTE: ERM will not allow you to upload a file containing errors.

As the file is uploading you will see a progress bar.



NOTE: the process can take a few minutes depending on how many records are being updated.

Once the progress bar becomes full the below screen appears upon completion.

Review Updates

✔ Update Complete.

[Return to Organisation: Bookit Travel](#)

File Review

Download the data from the table below, including feedback.

[Download file feedback](#)

Please review all changes shown below, specifically the legend which indicates the changes that will be made.
 If you would prefer empty fields from your file being treated as deletions then please check the box below.

Treat empty fields as deletes

Table Key: No change New value Existing value will be retained Existing value will be deleted Warning Error in Value Value will be ignored

| Feedback | Username | AdditionalConfirmationEmail |
|----------|---------------------|-----------------------------|
| ✔ | testuser2@email.com | Additional2@email.com |
| ✔ | testuser3@email.com | Additional3@email.com |
| ✔ | testuser4@email.com | Additional4@email.com |

You have successfully bulk updated details on the system! To return to the organisation page select the green highlighted button.

If you need to do the process again with another organisation, Select the home button in the top right corner and follow the same steps to complete the upload.



6. Cancel Users

IMPORTANT NOTE: It is **strongly** advised a backup is taken before cancelling any users (refer to section [6.4 Download backup](#)) as the Evolvi Support team will not be able to re-instate users which have been cancelled in error.

Having selected an organisation, select the 'Cancel users' button from the menu.



You will be presented with the following screen.

Cancel Users

Template downloads

If required, download a template to amend your user information below.

[Download empty template](#)
[Download populated template](#)

Upload

Please choose the file you wish to upload using the button below.

Please note the file must be in a .csv (Comma Separated Value) file.

Browse...

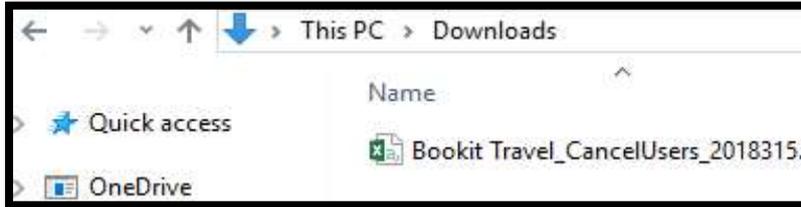
Please check that the filename shown above is correct, and then click below to review the changes that will be made.
 Please note, this will not update your records immediately. You will need to confirm this action after your review.

Review

6.1 Downloading an Empty Template

NOTE: If you already have a cancel file for upload skip to [6.3 Uploading File](#) to continue.

Select “Download empty template” this will give you an empty CSV file formatted for this organisation, which will be accepted by the system for uploads. The filename default is **OrganisationName_CancelUsers_DateOfDownload**.



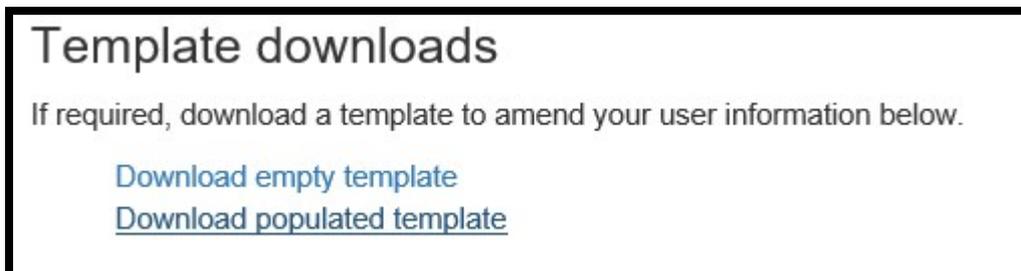
Below example of the template.

| | A | B | C | D |
|---|----------|---|---|---|
| 1 | Username | | | |
| 2 | | | | |
| 3 | | | | |

Once the information you require to be changed is populated save as a CSV then proceed to [6.3 Uploading File](#).

6.2 Downloading a Populated Template

During the initial template selection you will see an option to ‘Download Populated’ Template.



By selecting this option you will receive a downloaded copy of ‘all users’.

| | A | B |
|----|----------------------|---|
| 1 | Username | |
| 2 | testuser2@email.com | |
| 3 | testuser3@email.com | |
| 4 | testuser4@email.com | |
| 5 | testuser5@email.com | |
| 6 | testuser6@email.com | |
| 7 | testuser7@email.com | |
| 8 | testuser8@email.com | |
| 9 | testuser9@email.com | |
| 10 | testuser10@email.com | |
| 11 | testuser11@email.com | |
| 12 | testuser12@email.com | |
| 13 | testuser13@email.com | |
| 14 | testuser14@email.com | |

NOTE: Further information regarding the purpose of this function can be found here 7.User Reports.

6.3 Uploading File

As instructed proceed to upload the file using the browse button.

Upload

Please choose the file you wish to upload using the button below.

Please note the file must be in a .csv (Comma Separated Value) file.

Upon successful file selection the 'review' button will become available and the path of your chosen file should appear in the upload field.

Upload

Please choose the file you wish to upload using the button below.

Please note the file must be in a .csv (Comma Separated Value) file.

Please check that the filename shown above is correct, and then click below to review the changes that will be made.
Please note, this will not update your records immediately. You will need to confirm this action after your review.

NOTE: only one file at a time can be loaded, if another file is selected the field is populated with the latest chosen file.

If you are happy with your selection proceed by pressing 'Review'.

Providing no errors have been found with your file you will be presented with a success screen similar to below.

Review Cancellations

[Download Backup](#)

Please download this backup of users you are about to cancel, in case you make any mistakes and require the reactivation of anyone in the file uploaded.

[Download Backup](#)

✔ Upload is ready to submit.

File Review

Download the data from the table below, including feedback.

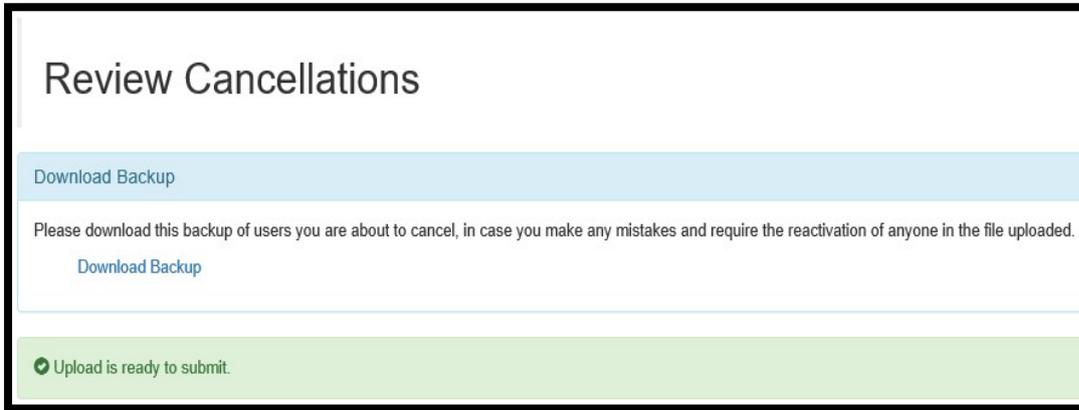
[Download file feedback](#)

Table Key: Warning Error in Value Value will be ignored

| Feedback | Username |
|----------|---------------------|
| | testuser2@email.com |
| | testuser3@email.com |
| | testuser4@email.com |
| | testuser5@email.com |
| | testuser6@email.com |

6.4 Download Backup

During the review process you will see an option to ‘backup’ before submitting your file.



By selecting this option a CSV file formatted for this organisation will be downloaded, The filename default is **OrganisationName_Action_DateOfDownload**, save this to your chosen location.



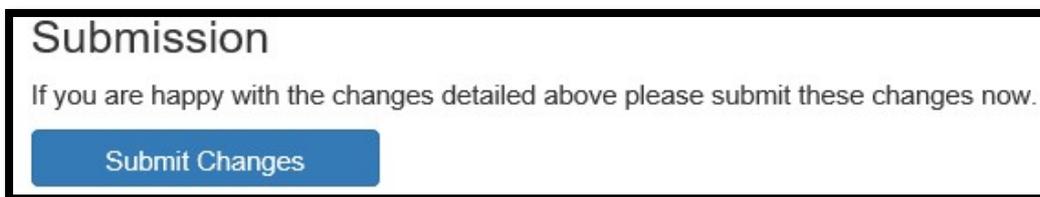
An example of the file contents are below.

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R |
|----|----------------------|----------------|----------------|----------------------|----------------|-------|----------|-----------------|----------|----------|----------|----------|----------|--------|----------|-----------|--------------|-----------------------------|
| 1 | Username | Organisation | Unit | PolicyGroup | DefaultAccount | Title | Forename | Surname | Address1 | Address2 | Address3 | Address4 | Address5 | City | County | Postcode | Telephone | AdditionalConfirmationEmail |
| 2 | testuser2@email.com | Bookkit Travel | Bookkit Travel | Agency Administrator | Bookkit 1 | Mr | A | Traveller House | Street2 | Street2 | Street2 | Street2 | Street2 | A City | B County | POST CODE | 01234 567890 | Additional12@email.com |
| 3 | testuser3@email.com | Bookkit Travel | Bookkit Travel | Agency Administrator | Bookkit 1 | Mrs | A | Traveller House | Street3 | Street3 | Street3 | Street3 | Street3 | A City | B County | POST CODE | 01234 567890 | Additional13@email.com |
| 4 | testuser4@email.com | Bookkit Travel | Bookkit Travel | Agency Administrator | Bookkit 1 | Mr | A | Traveller House | Street4 | Street4 | Street4 | Street4 | Street4 | A City | B County | POST CODE | 01234 567890 | Additional14@email.com |
| 5 | testuser5@email.com | Bookkit Travel | Bookkit Travel | Agency Administrator | Bookkit 1 | Mr | A | Traveller House | Street5 | Street5 | Street5 | Street5 | Street5 | A City | B County | POST CODE | 01234 567890 | Additional15@email.com |
| 6 | testuser6@email.com | Bookkit Travel | Bookkit Travel | GuestBooker | Bookkit 1 | Mrs | A | Traveller House | Street6 | Street6 | Street6 | Street6 | Street6 | A City | B County | POST CODE | 01234 567890 | Additional16@email.com |
| 7 | testuser7@email.com | Bookkit Travel | Bookkit Travel | Approval Required | Bookkit 1 | Mr | A | Traveller House | Street7 | Street7 | Street7 | Street7 | Street7 | A City | B County | POST CODE | 01234 567890 | Additional17@email.com |
| 8 | testuser8@email.com | Bookkit Travel | Bookkit Travel | Agency Administrator | Bookkit 1 | Miss | A | Traveller House | Street8 | Street8 | Street8 | Street8 | Street8 | A City | B County | POST CODE | 01234 567890 | Additional18@email.com |
| 9 | testuser9@email.com | Bookkit Travel | Bookkit Travel | Agency Administrator | Dump Account | Ms | A | Traveller House | Street9 | Street9 | Street9 | Street9 | Street9 | A City | B County | POST CODE | 01234 567890 | Additional19@email.com |
| 10 | testuser10@email.com | Bookkit Travel | Bookkit Travel | Agency Administrator | Dump Account | Mrs | A | Traveller House | Street10 | Street10 | Street10 | Street10 | Street10 | A City | B County | POST CODE | 01234 567890 | Additional10@email.com |
| 11 | testuser11@email.com | Bookkit Travel | Bookkit Travel | Agency Administrator | Bookkit 1 | Mr | A | Traveller House | Street11 | Street11 | Street11 | Street11 | Street11 | A City | B County | POST CODE | 01234 567890 | Additional11@email.com |
| 12 | testuser12@email.com | Bookkit Travel | Bookkit Travel | Basic Booker | Bookkit 1 | Mr | A | Traveller House | Street12 | Street12 | Street12 | Street12 | Street12 | A City | B County | POST CODE | 01234 567890 | Additional12@email.com |

NOTE: If you need to load the backup into the system follow the 'Uploading File' steps in section [4. Add Users](#) - You will need to edit the 'password' field before uploading the file all other columns will prepopulate with required information saved in the system.

6.5 Submit File

If you are happy with the results proceed to submitting the changes via the 'submit' button which is located at the bottom of the page.



NOTE: ERM will not allow you to upload a file containing errors.

As the file is uploading you will see a progress bar.

NOTE: the process can take a few seconds to a few minutes depending on how many records are being updated.

Once the progress bar becomes full the below screen appears upon completion.

Cancel Users – Result

✔ Users successfully Cancelled

[Return to Organisation: Bookit Travel](#)

Feedback

Download the data from the table below, including feedback.

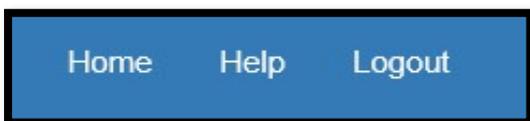
[Download file feedback](#)

Table Key: Warning Error in Value Value will be ignored

| Feedback | Username |
|----------|---------------------|
| ✔ | testuser2@email.com |
| ✔ | testuser3@email.com |
| ✔ | testuser4@email.com |
| ✔ | testuser5@email.com |
| ✔ | testuser6@email.com |

You have successfully bulk cancelled users on the system! To return to the organisation page select the green highlighted button.

If you need to do the process again with another organisation, Select the home button in the top right corner and follow the same steps to complete the upload.



7. User Profile Reports

With the introduction of the General Data Protection Regulation, Evolvi is no longer able to provide files containing details of user profiles. However, ERM users with the appropriate access will be able to download the required files themselves by following these steps.

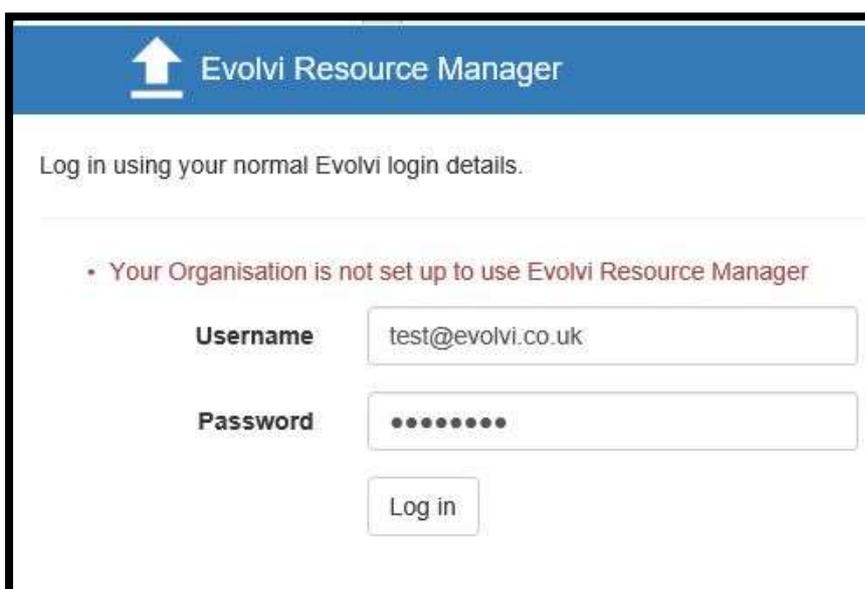
- Log into the ERM system in the usual way
- Navigate to the required organisation
- Select the Update Users option
- Download a populated template, and save to the required secure location.

8. Troubleshooting

Below are a few troubleshooting steps with a few know problems/solutions that in most cases can be resolved by the User.

8.1 Errors attempting to Login to ERM

Error1: A user has attempted to log into the system and encountering the below message.

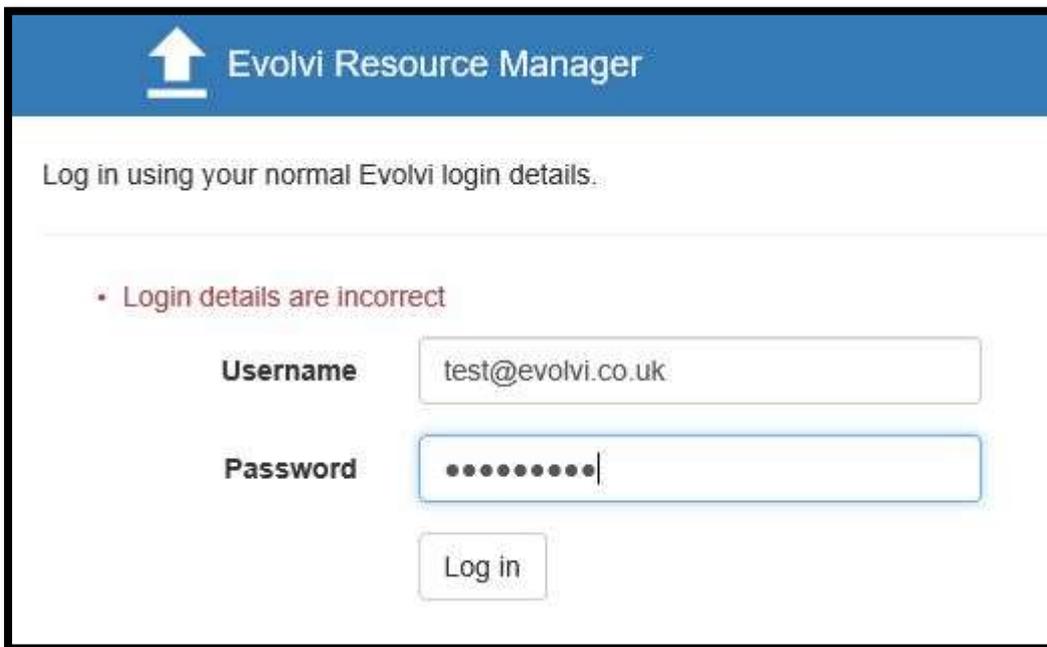


The screenshot shows the Evolvi Resource Manager login interface. At the top, there is a blue header with a white upward-pointing arrow icon and the text "Evolvi Resource Manager". Below the header, the text "Log in using your normal Evolvi login details." is displayed. A red error message is shown: "• Your Organisation is not set up to use Evolvi Resource Manager". Below the error message, there are two input fields: "Username" with the value "test@evolvi.co.uk" and "Password" with masked characters "••••••••". A "Log in" button is located below the password field.

Problem: The organisation does not have the feature required to use ERM enabled.

Solution: Contact Evolvi Support to enable the feature 'Profile Integration'

Error2: A user has attempted to log into the system and encountering the below message.



The screenshot shows the Evolvi Resource Manager login interface. At the top, there is a blue header with a white upward-pointing arrow icon and the text "Evolvi Resource Manager". Below the header, the text "Log in using your normal Evolvi login details." is displayed. A red error message "Login details are incorrect" is shown. The login form includes a "Username" field with the text "test@evolvi.co.uk" and a "Password" field with masked characters. A "Log in" button is located below the password field.

Problem: the username or password the user is attempting to use doesn't match the information saved on Evolvi.

Solution: Please try again with the correct details or contact a system administrator for the Evolvi Application to reset your details

8.2 Errors received when trying to upload a CSV file

Error 1: A user has attempted to upload a file but receiving the below error.

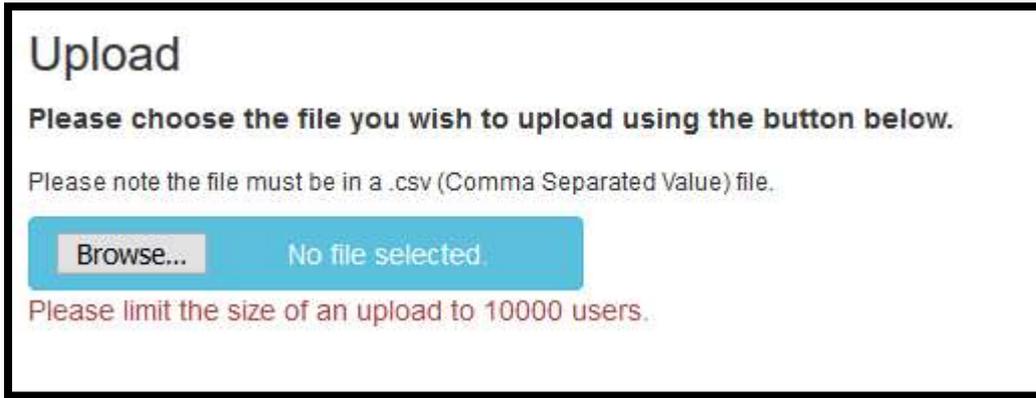


Problem: the file attempting to be uploaded has no data on the document.

Solution: Browse to the correct file or edit the existing document with the needed information.

Error 2: A user has attempted to upload a file but receiving one of the following errors.





Upload

Please choose the file you wish to upload using the button below.

Please note the file must be in a .csv (Comma Separated Value) file.

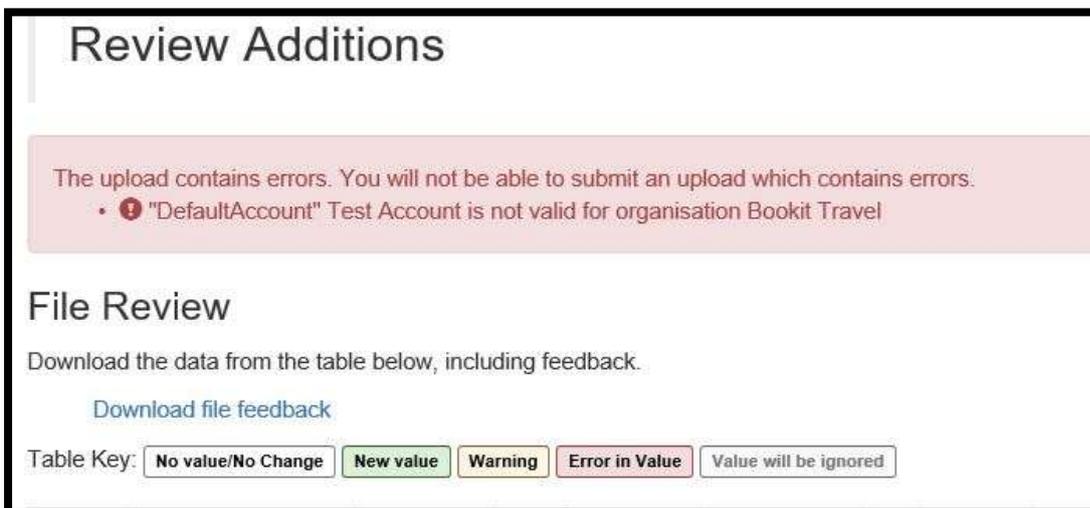
[Browse...](#) No file selected

Please limit the size of an upload to 10000 users.

Problem: the file attempting to be uploaded is too large.

Solution: Split the file into several smaller batches, making sure that the header row is included at the top of each one of them.

Error 3: A user has uploaded a file however during the 'review' they are unable to proceed due to the below error:



Review Additions

The upload contains errors. You will not be able to submit an upload which contains errors.

- [Error icon] "DefaultAccount" Test Account is not valid for organisation Bookit Travel

File Review

Download the data from the table below, including feedback.

[Download file feedback](#)

Table Key: No value/No Change New value Warning Error in Value Value will be ignored

Problem: the file attempting to be uploaded has an incorrect value for the 'DefaultAccount' for one or more users.

Solution: Edit the existing document with the correct information for the 'DefaultAccount' ensure to re save the file as CSV then re-upload the file following the uploading file steps.

8.3 Contact us

If you have any questions or queries regarding the ERM system, then please contact the Evolvi Helpdesk on 01732 598511 or support@evolvi.co.uk