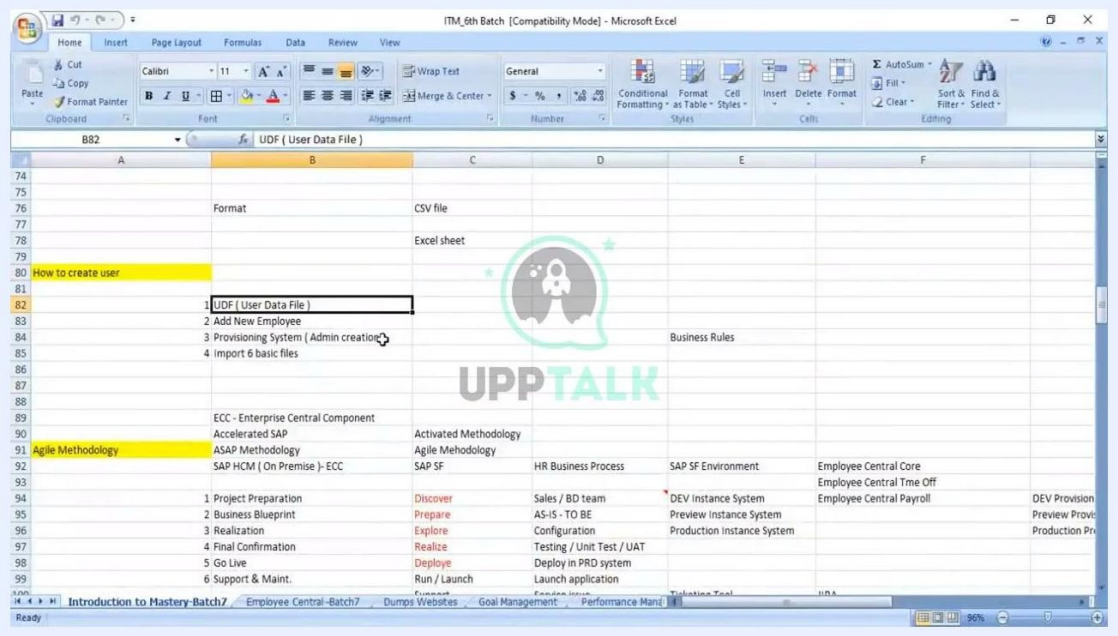
# How to create a user in SuccessFactors using the User Data File (UDF)

If you need to know how to create a user in SuccessFactors, you can do it in several ways. This guide covers the first method, the User Data File (UDF). You download the user data template from the Admin Center, fill in the user details, save the file as CSV, and prepare it for import or further processing.

## User creation methods

You can create a user in the system with any of these methods:

1. UDF (User Data File)
2. Add New Employee
3. Provisioning System (Admin creation)
4. Import 6 basic files




**Excel sheet listing four user creation methods: UDF, Add New Employee, Provisioning System, and Import 6 basic files**

## Prerequisites

Before you start, make sure you have:

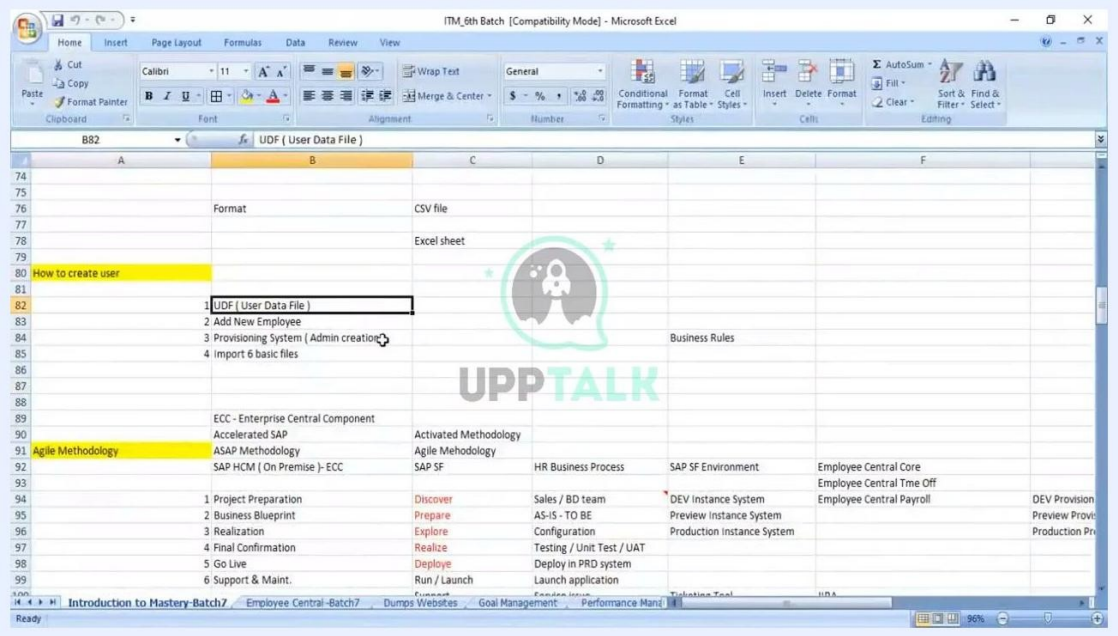
- Your login credentials for the Uptalk platform.

- Access to the **Employee Export** option and the Admin Center.
- Microsoft Excel or a compatible spreadsheet editor.
- The user information you need to enter, such as status, user ID, name, email, and organizational details.
- Confirmation from your organization or customer of whether the USERID should match the user's email or another unique value.

## Steps to create a user in SuccessFactors with the UDF

### 1. Log in to the Uptalk platform

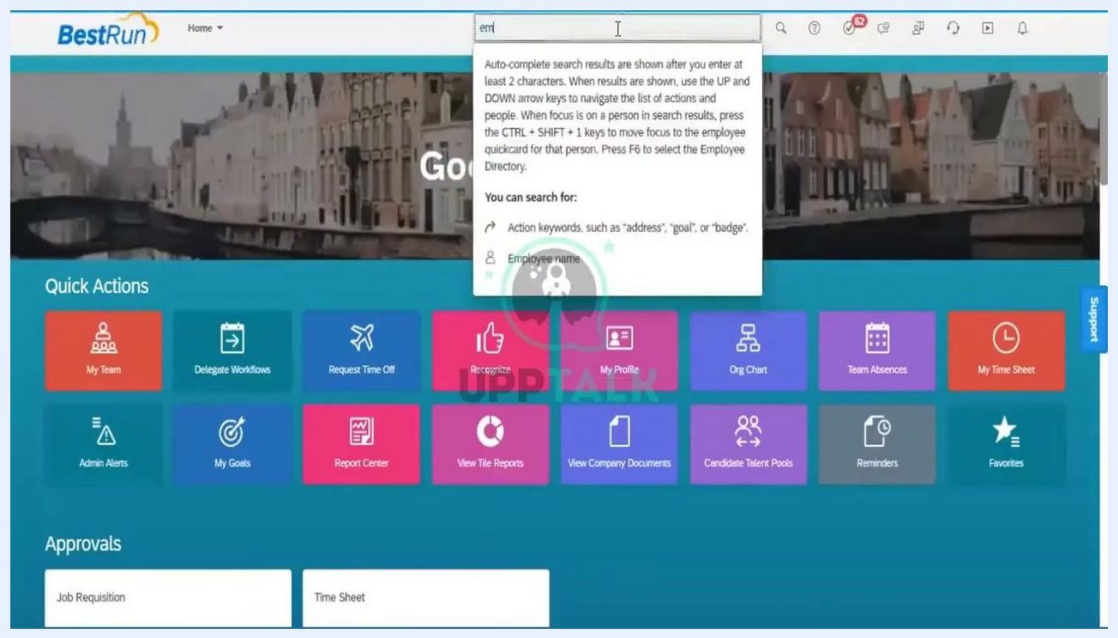
Open the Uptalk platform and sign in with your credentials. After a successful login, the home page opens and shows **Quick Actions** and other dashboard elements.




**Uptalk home page with Quick Actions tiles such as My Team, Request Time Off, and Org Chart, and a For You Today section**

## 2. Search for Employee Export

To create a user via UDF, you first need the user data template. In the search bar at the top of the dashboard, type "employee expo". Then select **Employee Export** from the dropdown list.




**Search bar with "employee expo" typed and Employee Export highlighted in the dropdown list**

## 3. Download the user data file template

Selecting **Employee Export** takes you to the Export Users page in the Admin Center. Here you can download standard user import CSV templates or user directories in CSV format. The page also offers export settings, character encodings, and compensation data options.

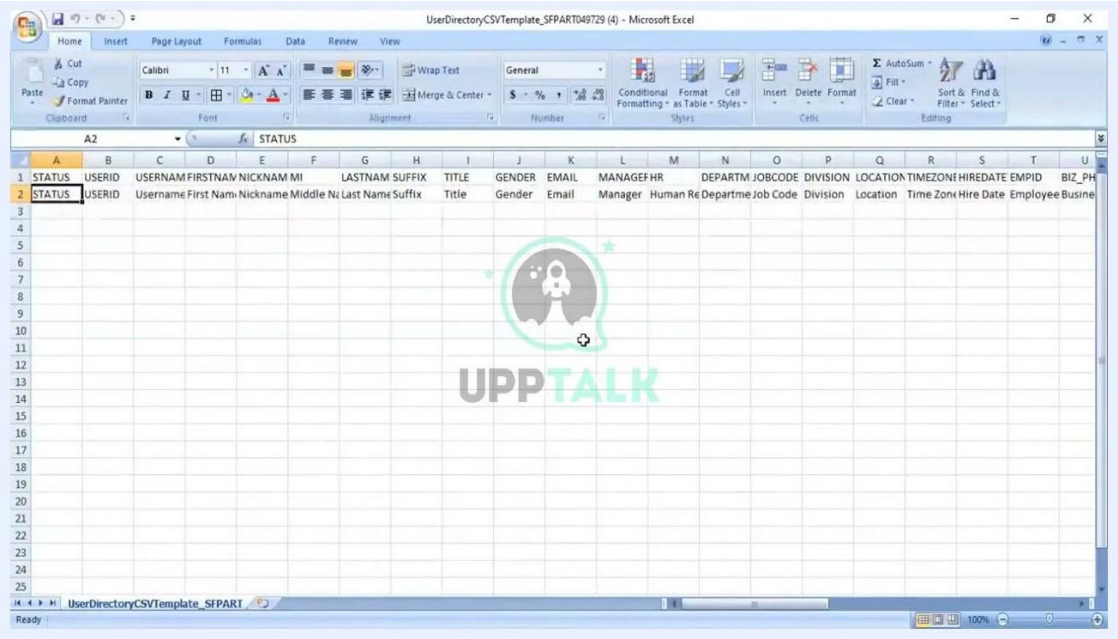
Click **Export Template** to download the user data file template.




**Admin Center Export Users page with Export Template, Export User File, and Export External 360 Raters options, and the cursor on Export Template**

## 4. Open the downloaded template

Find the downloaded file in your Downloads folder. It is typically named UserDirectoryCSVTemplate_SFPART049729.csv or similar. Open it in Microsoft Excel or a compatible spreadsheet editor, and confirm that it opens and is visible on your screen.



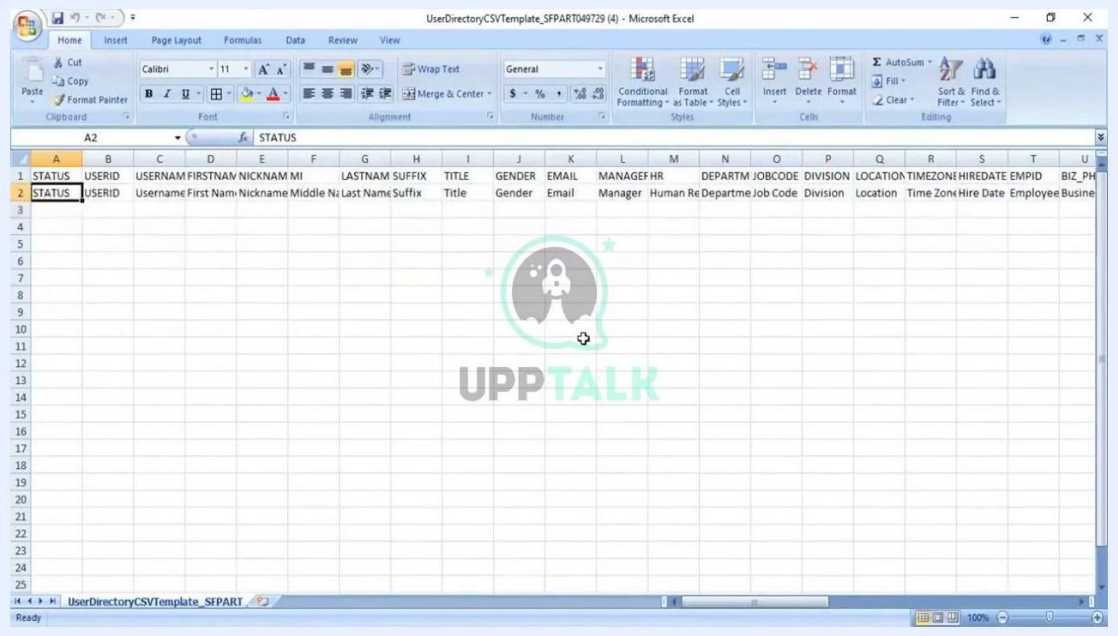

**Excel window showing the blank User Directory CSV template with column headers such as STATUS, USERID, USERNAME, and FIRSTNAME**

## 5. Review the structure of the template

The template is blank except for the header row and a sample row. Each column represents a user attribute that you fill in to create a new user. The columns include:

- STATUS, USERID, USERNAME, FIRSTNAME, NICKNAME, MI (Middle Initial), LASTNAME, SUFFIX
- TITLE, GENDER, EMAIL, MANAGER, HR, DEPARTMENT, JOBCODE, DIVISION

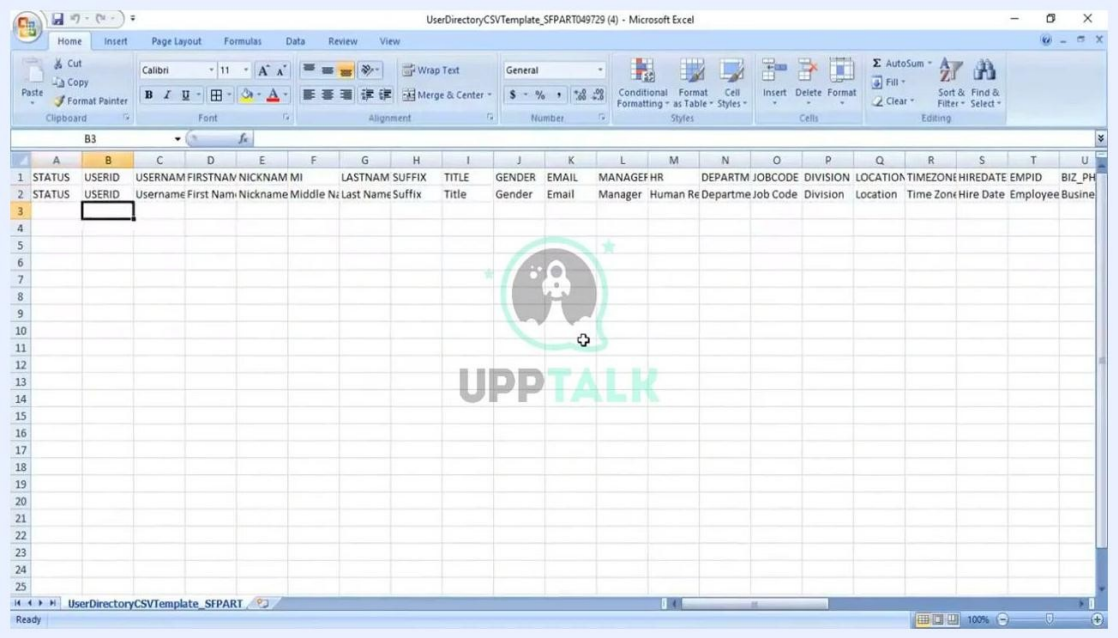
- LOCATION, TIMEZONE, HIREDATE, EMPID, and additional fields as required




**Excel template showing all user creation columns, with header and sample field names and no user data filled in**

## 6. Understand the data entry requirements

Fill in the details for each user you want to create, as the column headers indicate. Required fields typically include STATUS, USERID, FIRSTNAME, LASTNAME, EMAIL, and other organizational details. Complete each field according to your organization's data standards and the template's requirements.

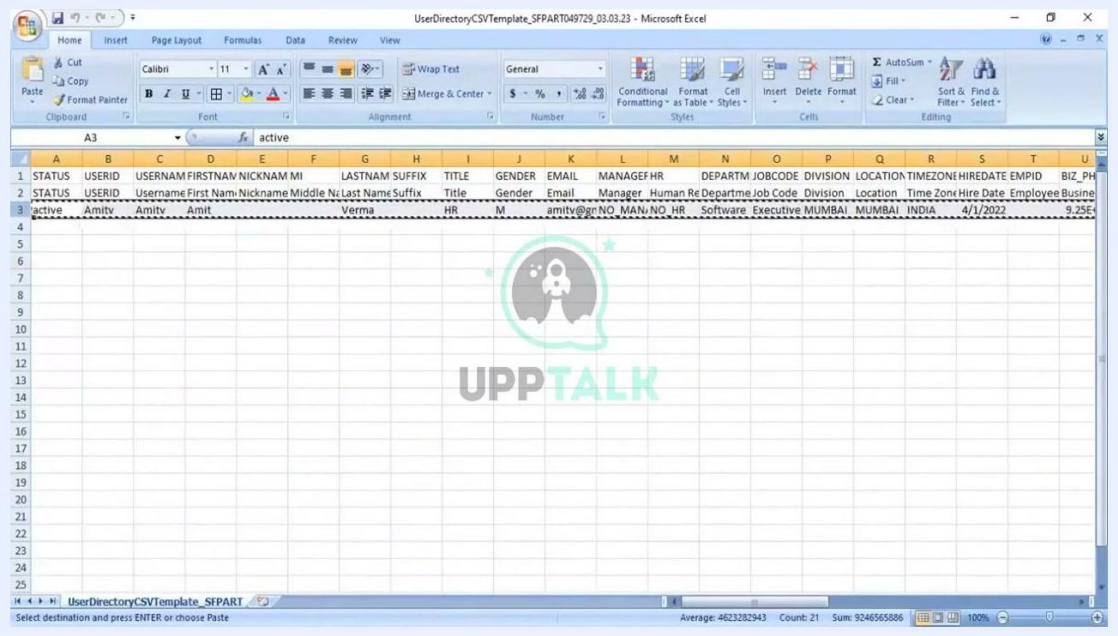



**Excel template with the cursor in the first empty row, ready for data entry**

## 7. Prepare and align your user data

Gather the user information from your records or HR system. If you have several users to add, prepare all their details in advance so entry is efficient.

If your data comes from another source, such as an HR export, align the columns to match the template. Copy the data and paste it into the template, making sure each value lands in the correct column. Then check that all required fields are filled and formatted correctly.



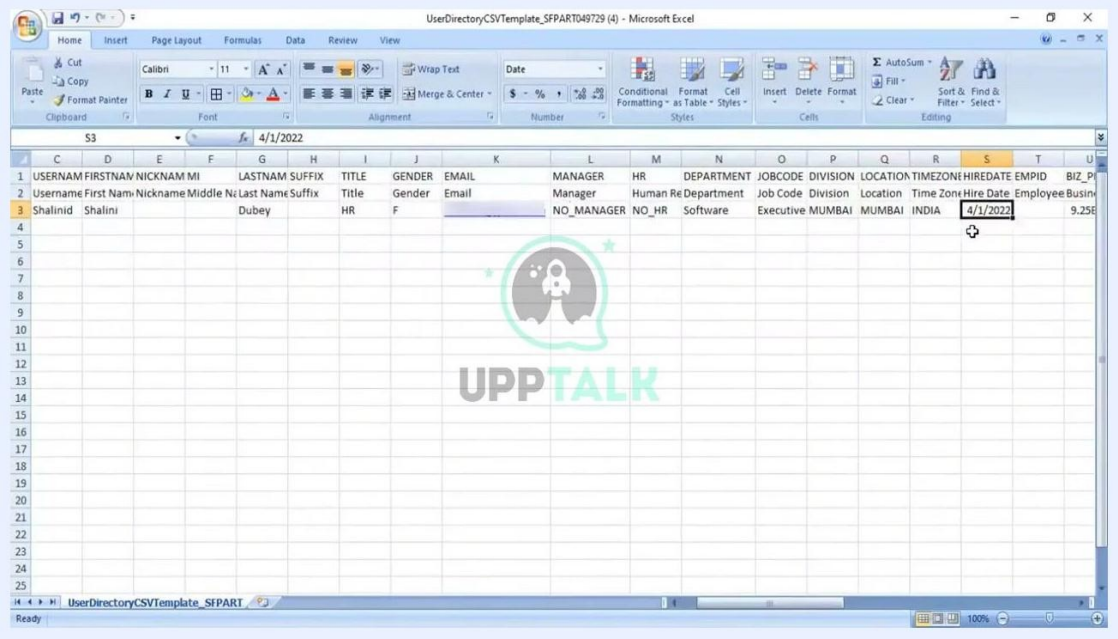

**Excel template with a sample user row selected, ready for copy-paste or editing**

## 8. Enter the user details

Fill in the following columns for each user:

- **STATUS**: Enter active.
- **USERID**: Enter the unique user ID (for example, Shalinid).
- **USERNAME**: Enter the username (for example, Shalini).
- **FIRSTNAME**: Enter the first name (for example, Shalini).
- **LASTNAME**: Enter the last name (for example, Dubey).
- **TITLE**: Enter the title (for example, HR).
- **GENDER**: Enter F for female or M for male.
- **EMAIL**: Enter the user's email address.
- **MANAGER**: Enter the manager, or NO_MANAGER if the user has none.
- **HR**: Enter the HR code (for example, NO_HR).
- **DEPARTMENT**: Enter the department (for example, Software).
- **JOBCODE**: Enter the job code (for example, Executive).
- **DIVISION**: Enter the division (for example, MUMBAI).
- **LOCATION**: Enter the location (for example, MUMBAI).

- **TIMEZONE**: Enter the time zone (for example, INDIA).
- **HIREDATE**: Enter the hire date in MM/DD/YYYY format (for example, 4/1/2022).

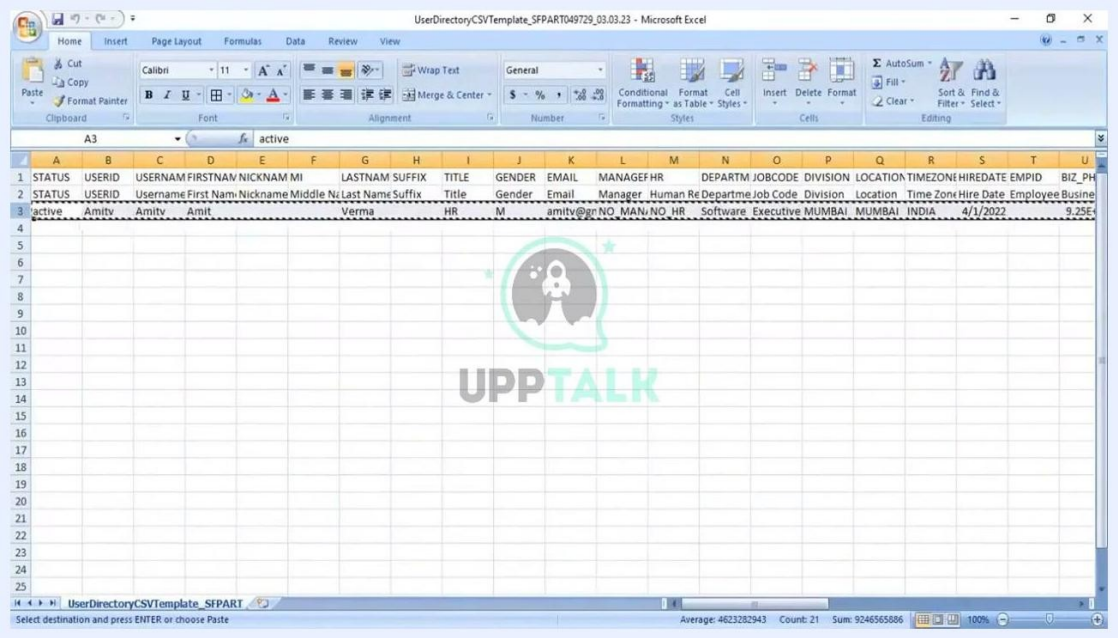



**Excel template with user details entered for a user named Shalini Dubey across the STATUS through HIREDATE columns**

If you are not assigning a manager, enter NO_MANAGER in the MANAGER column. Use all capital letters, with an underscore only between "NO" and "MANAGER". If you are not assigning an HR representative, enter NO_HR in the HR column in the same way.

## 9. Make sure each USERID is unique

The USERID field must contain a unique identifier for each user. If you reuse an existing USERID, verify that it is correct and not duplicated elsewhere in the file.



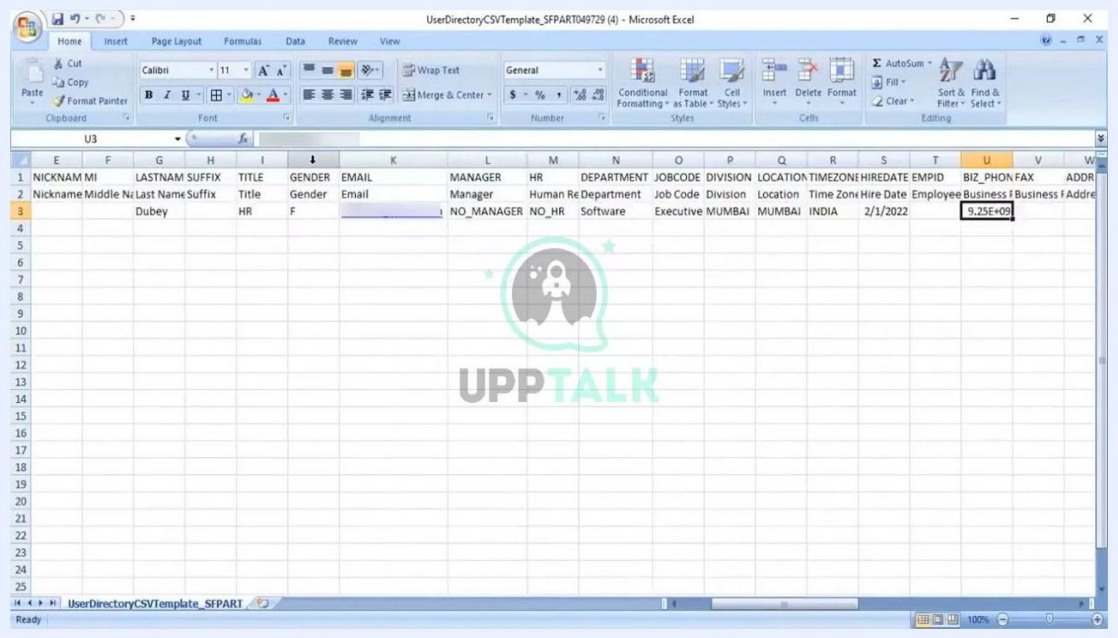

**Excel template with the USERID field being edited to the value Amitv**

## 10. Verify the department and job code

Make sure the DEPARTMENT and JOBCODE columns contain the correct, pre-created values. Do not change them if they are already set up. For example, use Software for the department and Executive for the job code.

## 11. Review the hire date and business phone number

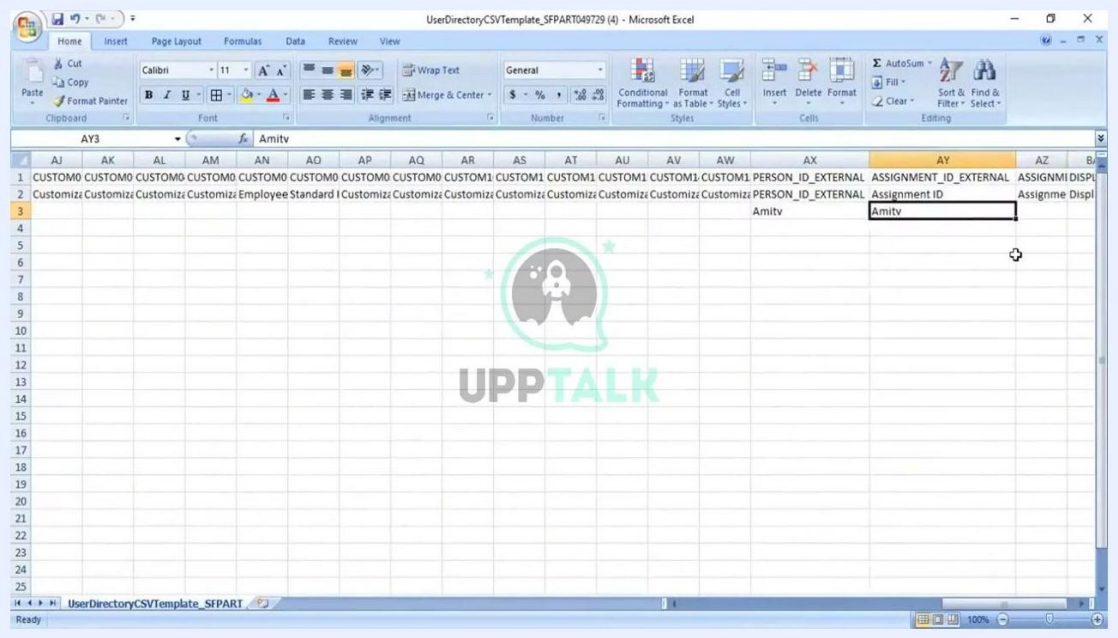
Check that the HIREDATE column uses MM/DD/YYYY format (for example, 2/1/2022). Then go to the BIZ_PHONE column. If the phone number appears in scientific notation (for example, 9.25E+09), reformat the cell to show the full number as text or a standard number. Enter or correct the business phone number as needed.




**Excel template showing the HIREDATE and BIZ_PHONE columns, with the phone number displayed in scientific notation as 9.25E+09**

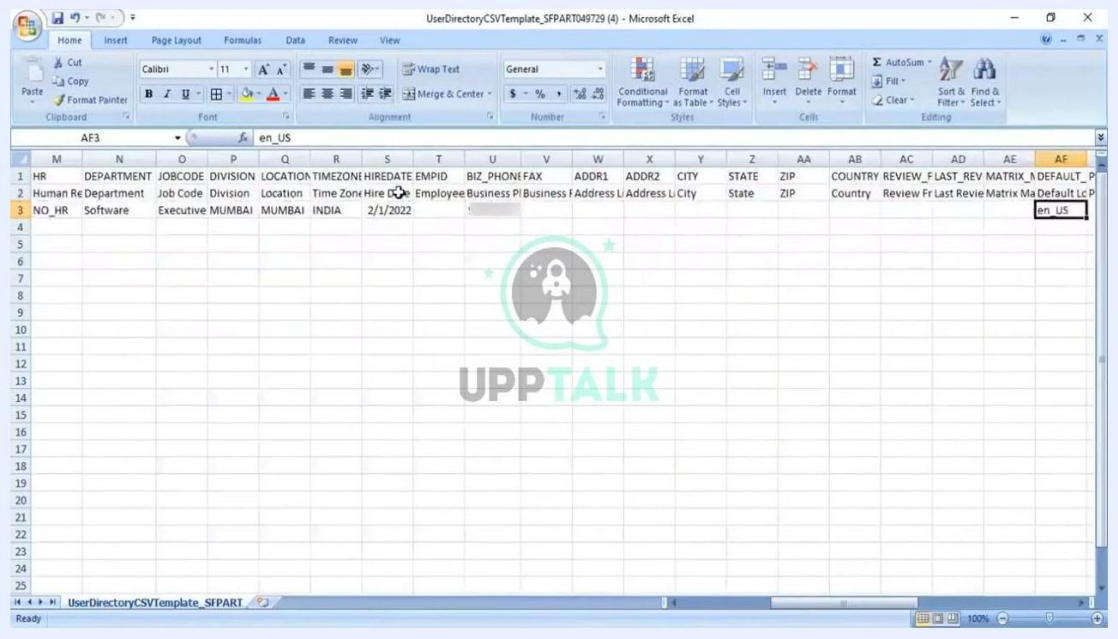
## 12. Add optional details

If required, fill in other fields such as FAX, ADDR1, ADDR2, CITY, STATE, ZIP, and COUNTRY. In the DEFAULT_LOCALE column, enter the locale code (for example, en_US).




**Excel template with en_US entered in the DEFAULT_LOCALE field and address fields visible but empty**

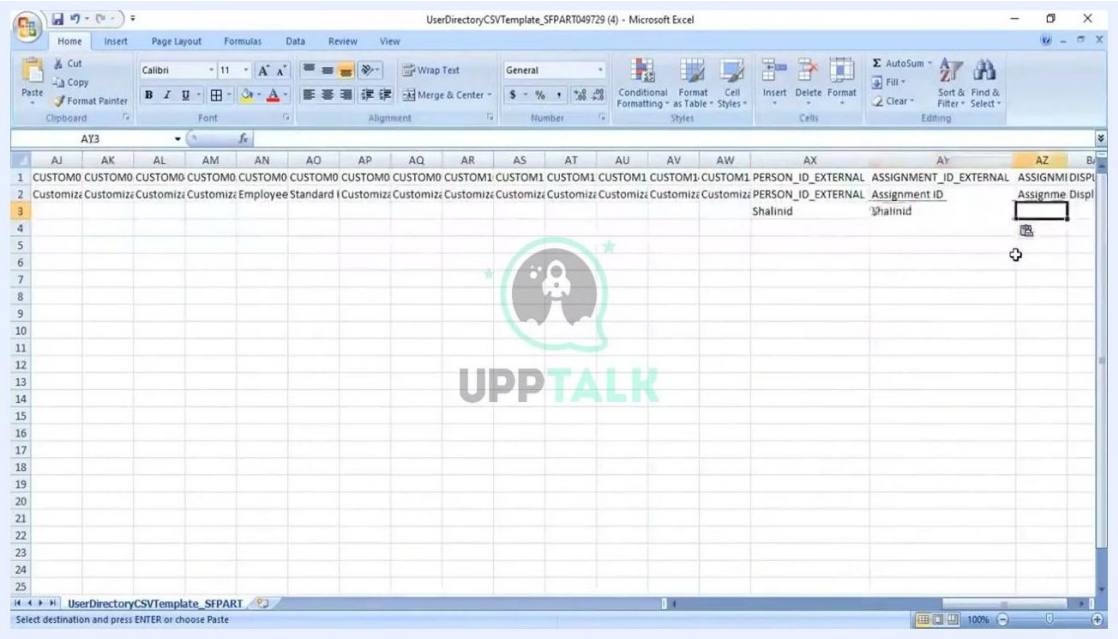
Not every field in the template is mandatory. Complete only the required fields and those relevant to your organization or process. Leave the rest blank if you don't have the information or it doesn't apply.




**Excel template scrolled to the right, showing many columns with only some fields filled in**

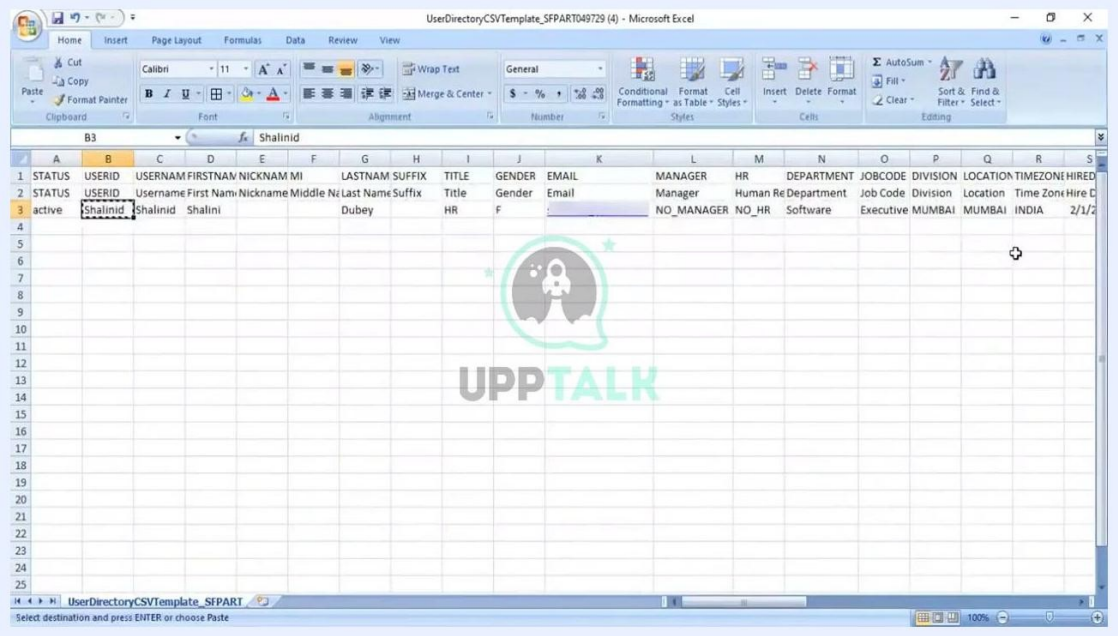
## 13. Enter the user ID in the assignment fields

Scroll to the far right of the template to find the PERSON_ID_EXTERNAL and ASSIGNMENT_ID_EXTERNAL columns. Enter the user ID (for example, Shalinid) in both fields for the corresponding user. If other assignment-related fields need the user ID, enter it consistently.




**Excel template with PERSON_ID_EXTERNAL and ASSIGNMENT_ID_EXTERNAL filled with the user ID Shalinid**

To keep the values consistent, copy the user ID from its original cell and paste it into each column that needs it.



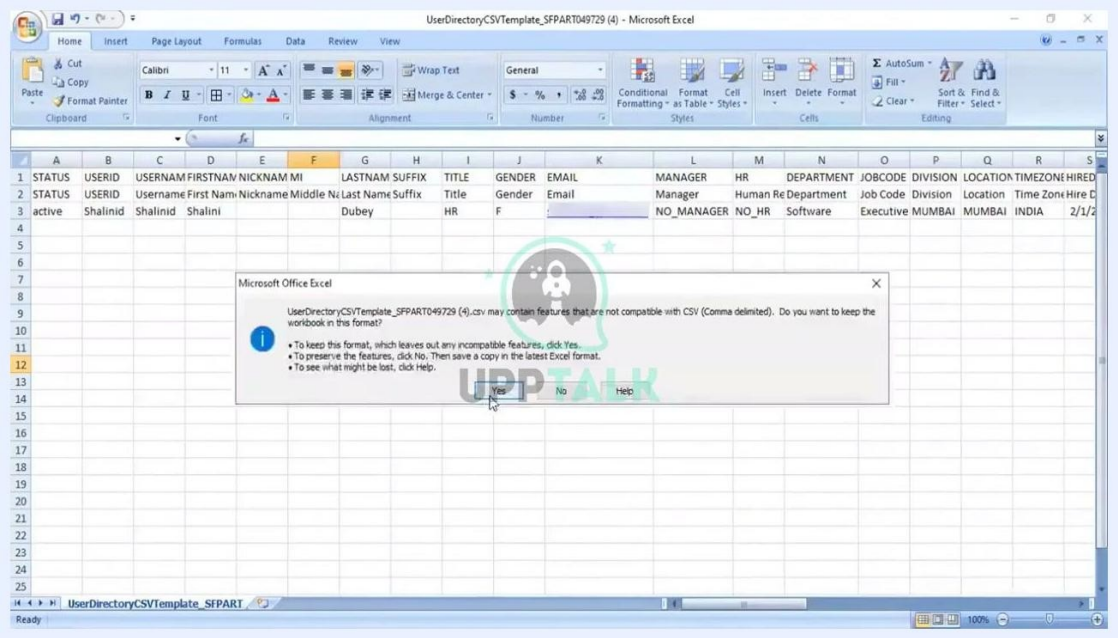

**Excel template with the USERID Shalinid selected for copying into other fields**

## 14. Verify all entered data

Double-check every field you entered or edited for accuracy and completeness. Make sure no required field is blank and all data is in the correct format.

## 15. Save the file in CSV format

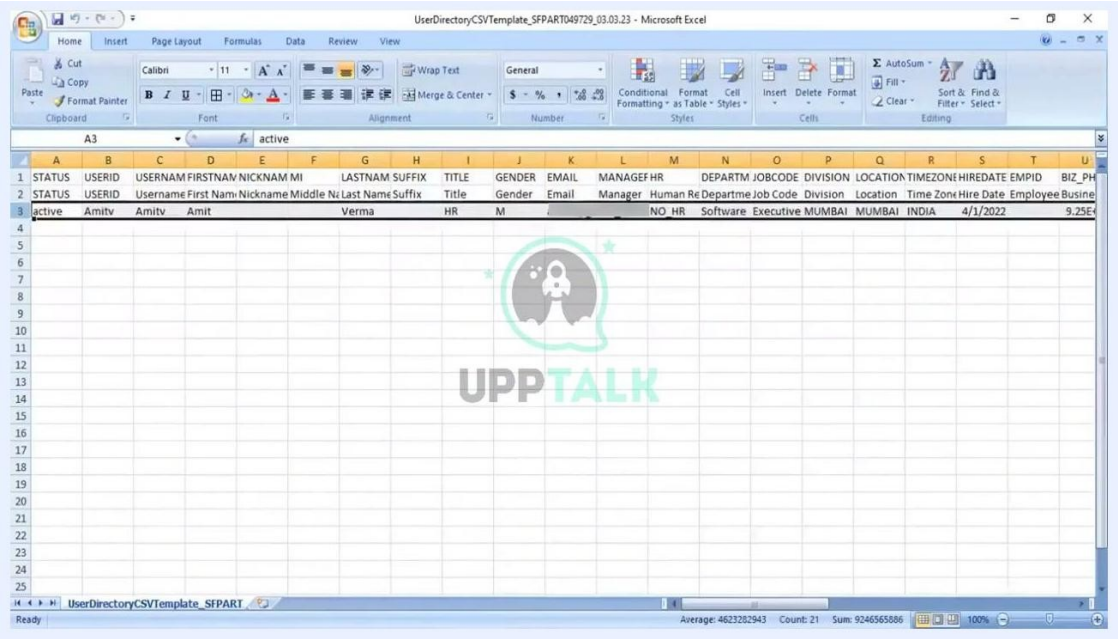
In Excel, click the **Save** icon at the top left or press Ctrl + S. A dialog may warn that some features aren't compatible with the CSV (Comma delimited) format. Click **Yes** to keep the file in CSV format.




**Excel dialog asking whether to keep the workbook in CSV format, with the Yes button highlighted**

## 16. Open and review the saved CSV

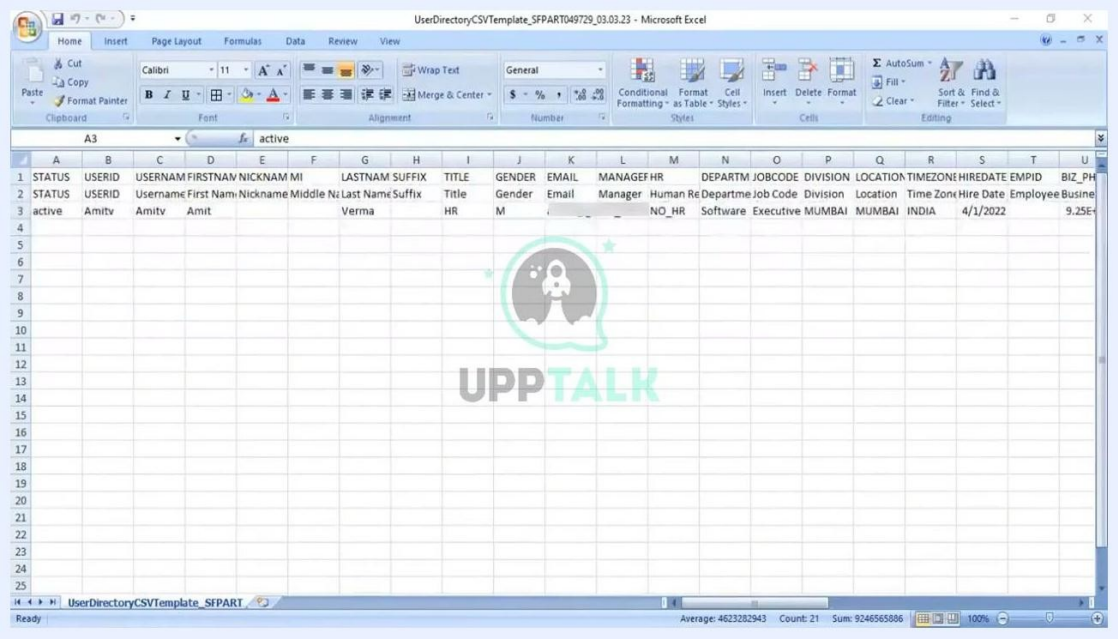
Go to the folder where you saved the file, commonly Downloads. If you don't see the folder, open your file explorer and browse to it. Double-click the CSV file to open it, then check that all data is present and correctly formatted. Some formatting can be lost when you save as CSV.




**Excel window showing the completed User Directory CSV template with user data filled in**

## 17. Copy the data for further use

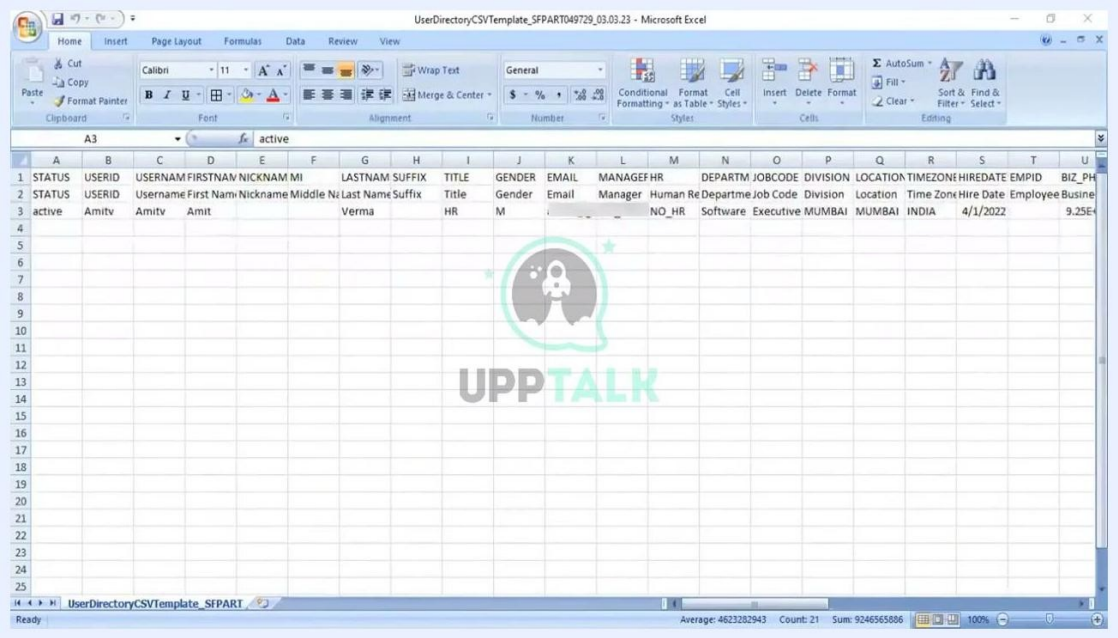
To transfer data from this CSV to another sheet or system, select the relevant cells or rows. Press Ctrl + C to copy them.



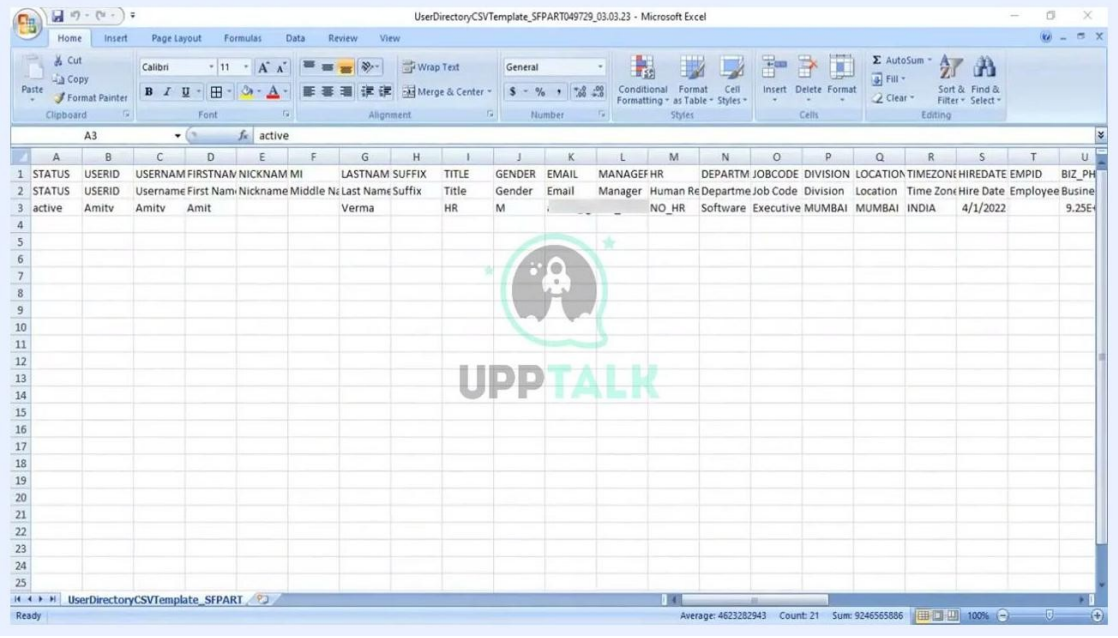

**Excel window with user data selected and ready to copy**

## 18. Paste the data into the required sheet

Go to the target sheet or location and press Ctrl + V to paste the data. Check that the data appears correctly and matches the original formatting as closely as possible.




**Excel window preparing to paste copied user data into another sheet**




**Screen displaying an envelope icon, the email address sales@upptalk.com, and the UPPTALK logo, indicating where to send support requests.**

## Get help

If you have a question or run into a problem, email the support team at sales@upptalk.com. Include your completed CSV file and a description of your issue or question.

## Summary

You now know how to create a user in SuccessFactors with the UDF method. You downloaded the template through **Employee Export**, filled in the user details, saved the file as CSV, and reviewed it. Always confirm that the CSV format is kept and that no critical data is lost when you save.

## What's next

- Import or further process the completed User Directory CSV file in your organization's systems.
- Contact support at sales@upptalk.com if you have uncertainties or technical issues.