Guide to Preparing a Batch User Upload

Batch User Upload simplifies the task of Adding and Managing Users in your Brainshark site. Unlike the process of manually adding, updating or deleting user profiles one at a time, Batch User Upload allows you to make all of these changes simultaneously. Updated user profile data is entered into the *Batch Upload Spreadsheet* by the Company Administrator. Once complete, the *Batch Upload Spreadsheet* is sent to Brainshark Support for upload. Preparation of the *Batch Upload Spreadsheet* requires specific formatting and careful consideration. This document will help guide you through the process of preparing the *Batch Upload Spreadsheet.*

Items to Consider

Be sure to download the most recent version of the *Batch Upload User Spreadsheet* from the Brainshark Knowledgebase before you get started.

If you have existing user profiles in your Brainshark site, and need to use the Batch User Upload process to make changes, be aware that:

- All data in the Batch Upload User Spreadsheet will overwrite any existing data in the Brainshark user profile. Be careful to populate the Batch Upload User Spreadsheet with all **current** profile information PLUS any edits to be made.

- The Brainshark Company Administrator can navigate to **My Applications** > **Administration**. Select **Reporting** from the blue navigation bar. And, from the *Things you can do* menu at the left, select **Data Download** and then the **User Bulk Download** report. This produces a Batch User Upload Spreadsheet of all current users including all existing profile data. NOTE: The spreadsheet will not list the current password for each user. This is a required field; if you want to maintain the user's current password, add that direction in your request to Brainshark Support.

- You can then use this spreadsheet to make any necessary edits and submit the now updated spreadsheet to Brainshark Support. The columns below will correspond to the columns in your spreadsheet; any questions can be directed to Brainshark Support.

If you will want individuals placed in Groups, note that:

- Groups must exist in Brainshark before using the Batch User Upload, otherwise an error will return.

- Use columns named *GroupName1* through *GroupName20* to specify the groups to which this user should belong.

- For customers using Rapid learning, Groups affect dynamic enrollment into courses and/or curriculums.

- See the *GroupName* section of this document for more information.

Remember to take the following precautions to be sure that your batch upload is error free:

- File must be in .csv format.

- Remove all commas, apostrophes, bars and slashes in the spreadsheet. This includes names, titles, and email addresses

- The spreadsheet must be used exactly as it is formatted. Do not delete, add, hide or rename any columns. Do not modify the headings or the format of the upload sheets.

- Remember to include all required data. If columns do not apply for your use, leave them blank or set them to the recommended default using the chart below.

- Include the header row in the file.

- Delete any empty rows/columns by highlighting all columns to the right of the last column completed and all rows under the last row completed (right click and select **Delete**) to be sure there are no cells containing data that may cause the .csv upload to fail.

Fields for User Uploads

The following table includes the Column Header you will see in the Batch Upload Spreadsheet as well as the corresponding Column Value to include depending on the action you would like to take. Be aware that certain fields are required and are denoted below by an asterisk (*) next to the Column Header name. For Group Upload fields, please see the Fields for Group Uploads section below.

NOTE: All fields can be updated EXCEPT the user name. If an upload is submitted with a user name updated, a new user will be created.

Column Header	Column Value
(Column A) Action	This field is <u>not</u> required. When used, only the following values can be entered in this field; all other commands will cause an error. **NOTE:** This field cannot be used to delete users or change usernames. Enter **Add to** create a new user. Entering this value for a user that already exists will cause an error. Enter **Update** to update the profile for an existing user. Entering this value for a user that doesn't exist will cause an error. Leave the field **<blank>** if you want to automatically **Add** if the user doesn't exist, and **Update** if it does.

Column Header	Column Value
(Column B) CompanyDirectory*	Required field. All values in this field must be the same for the entire Batch Upload Spreadsheet. Any rows that contain a different value for *Company Directory* than the value in the first row will not be added. In this field, enter the login directory for the company. For example, if your Brainshark Site URL is www.brainshark.com/yoursite then enter "yoursite" in this column. Do not enter the complete URL.
(Column C) UserName*	Required field. Enter the username you want to create/update within the Brainshark site specified in the *Company Directory* field.
(Column D) Password*	Required field. If *Action* field contains **Add**: Enter the password to use for the user being created. If *Action* field contains **Update**: Enter the new password for the existing user. The password field must contain a value. Even If you are selecting the option to have the system generate password for your users when they are created, it is still necessary to have a value in this field when populating the Batch User Upload Spreadsheet. The password entered must meet the password policy of the company site specified in the *Company Directory* field. You could upload a simple password and require the user to create a new one on first login. **SELF-REGISTRATION USERS NOTE:** If the *Ignore password on update* is set, then this column is ignored on update. If it is clear then the password is updated to this value. *Please note in your request to Brainshark Support if existing passwords are to be ignored upon updates.*
Column E) LastName*	Required field. The last name of the user.
(Column F) FirstName*	Required field. The first name of the user.
(Column G) Title	The title of the user.
(Column H) Department	The department of the user.

Column Header	Column Value
(Column I) Phone	The phone number of the user.
(Column J) Email*	Required field. The email address of the user. **NOTE:** Email address entered must be unique for each user, contain the appropriate '@' symbol and domain. Incomplete, inaccurate, duplicate or missing email address will cause the Upload to fail.
(Column K) CompanyName	The company name to which the user belongs.
(Column L) CreatePersonalFolder	This field controls whether a personal authoring folder is created for the new user. Users with a personal authoring folder will immediately have authoring rights once this spreadsheet is uploaded. If *Action* field contains **Add**: Enter **1** for **Yes** or **0** for **No**. If select **Yes** to enable, also complete *MayRequestGA* and *MayMakeGAOwner* fields. Note: If *Action* field contains **Update,** this field is ignored. If an authoring folder already exists, Brainshark will not remove it.
(Column M) IsCompanyAdmin	Required field. This field controls whether the user is created as a company administrator. Company administrators have elevated privileges which help them manage the Brainshark application and its use. Enter **1** for **Yes** or **0** for **No**.
(Column N) MayEditProfile	Required field. This field controls whether the user has the ability to edit his/her own profile. A user profile includes personal information including but not limited to: name, address, phone, and communication preferences with regard to newsletters and notifications from Brainshark he/she has elected to receive. Enter **1** for **Yes** or **0** for **No**. *We recommend selecting 'No' when multiple users are sharing one login for the purposes of content creation.
(Column O) IsActive	Required field. This field controls whether the user is created as Active or Inactive. Inactive users cannot log in. Enter **1** for **Active** or **0** for **Inactive**.
(Column P) Address1	The address 1 of the user.
(Column Q) Address2	The address 2 of the user.
(Column R) City	The City of the user.

Column Header	Column Value
(Column S) State	The State of the user.
(Column T) Country	The Country of the user.
(Column U) PostalCode	The postal code of the user.
(Column V) Custom1	Custom fields can be used to store user specific information such as an employee ID number, office number or location and other user relevant information not already available in the user profile fields. It is not advisable to store personal information in the custom fields (i.e., social security number) or other data that is subject to privacy regulations.
(Column W) Custom 2	See *Custom1* for more information.
(Column X) Custom 3	See *Custom1* for more information.
(Column Y) Custom 4	See *Custom1* for more information.
(Column Z) UCI	The Unique Company Identifier (UCI), if any, used by the company to uniquely identify the user.
(Column AA) MayCreateInteractions	Required field. This field controls whether the user is able to add Interactions (questions, polls and surveys) to presentations. Enter **1** for **Yes** or **0** for **No**. (If the user will be creating content enter **1**.)
(Column AB) IsLearningAuthor	Required field. This field controls whether the user is a Learning Course Author. Only applicable if the site designated in the *Company Directory* field has Rapid Learning enabled. Enter **1** for **Yes** or **0** for **No**.
(Column AC) IsLearningManager	Required field. This field controls whether the user is a Learning Manager. Only applicable if the site designated in the *Company Directory* field has Rapid Learning enabled. Enter **1** for **Yes** or **0** for **No**.
(Column AD) IsLearningAdmin	Required field. This field controls whether the user is a Learning Administrator. Only applicable if the site designated in the *Company Directory* field has Rapid Learning enabled. Enter **1** for **Yes** or **0** for **No**.

Column Header	Column Value
(Column AE) MustChangePassword	Required field. This field controls whether the new user is prompted to change his/her password on the first login. Enter **1** for **Yes** or **0** for **No**. If the Action column is set to **Update**, and the company does not want existing passwords to be modified during the upload process, please note in your request to Brainshark Support whether existing passwords are to be ignored.
(Column AF) DefaultApplication	Required field. Sets the default application the users see when they login. If using the default application for this site, enter "<<default>>" for each row in this column. Other options include: • **Use Company Default** - set to use company default • **Presentations** – default app for this user will be Presentations • **Administration** – default app for this user will be Administration • **Content Portal** – default app for this user will be Content Portal • **Learning** – default app for this user will be Rapid Learning if Rapid Learning is enabled for your company. • **Defaulted** – for add, use company default. For update, leave unchanged. If not specified, users will see the company default **Content Portal**. Any other value will return an error. If the user does not have access to the application specified in this field, the user will see the company default application.
(Column AG) DefaultHomePage	Required field. Enter "<<default>>" for each row in this column.
(Column AH) MayRequestGA	Required field. Applies when *Create Personal Folder* is enabled for the user. Controls whether this user can request a guest author for a presentation. Enter **1** for **Yes** or **0** for **No**. If select Yes to enable, also complete *MayMakeGAOwner* field.
(Column AI) MayMakeGAOwner	Required field. Applies when *Create Personal Folder* and *May Request GA* are enabled for the user. Next, determine whether the user may make a guest author the owner of their presentation. Enter **1** for **Yes** or **0** for **No**.

Column Header	Column Value
(Column AJ) MayDeleteGAPres	Required field. If *May Request GA* and *May Make GA Owner* are enabled, consider whether the user is able to delete presentations owned by a guest author. Enter **1** for **Yes** or **0** for **No**.
(Column AK) Bio	Text field where you can enter a short biography of the user. If the biography contains commas or quotes, they must be in quotation marks and use standard quoting rules. Do not use line breaks (return, enter).
(Column AL) IMDisplayText	Values to specify IM (instant message) for user. Meaning varies with company IM settings.
(Column AM) IMLinkID	Values to specify IM (instant message) for user. Meaning varies with company IM settings.
(Column AN) IMLInkType	Values to specify IM (instant message) for user. Meaning varies with company IM settings.
(Columns O - BH) GroupName1-20	Use these fields to specify up to 20 groups to which the user should belong. The Groups must exist in your Brainshark site before running this Batch User Upload; the name entered in this field must exactly match the name of the group as it appears in the Brainshark site. Be careful of leading or trailing spaces. Groups should be added starting with *Group 1* and are added based on the groups to which you want to add the user. We recommend you cut and paste the group name from your Brainshark site as it must be EXACTLY as specified in the application or the upload will fail. The group column does not need to be exclusive to one group. For example: User 1 is enrolled in Marketing (group1,) Management (group2), Sales (group3); User 2 is enrolled in Engineering (group1), Management (group2), IT (group); User 3 is enrolled in IT (group1), Engineering (group2), Tech Support (group3). Please alert Brainshark Support if existing user groups are to be updated when submitting the upload. Self-registration users: If the Ignore password on update is set to **Yes**, then this column is ignored on update. If it is set to **No**, then the password is updated to this value.

Column Header	Column Value
(Column BI) SecondaryEmail	Secondary email for the user. Generally used only for Marketing Campaigns application.
(Column BJ) ReceiveBrainsharkNewsletter	Required field. This field controls whether to send the user the Brainshark Newsletter. Enter **1** for **Yes** or **0** for **No**.
(Column BK) ReceiveAdminBrainsharkNewsletter	Required field. This field controls whether to send the user the Brainshark Administrator Newsletter. If the user is a Company Administrator, then enter **1** for **Yes**. If not, enter **0** for **No**. (In other words, mirror the *Is Company Admin* field setting here.)
(Column BL) SendWelcomeEmail	Required field. This field controls whether to send the user an email which includes a randomly generated password and the link to the Brainshark site, or to use the default password identified in the required *Password* field. **Note:** This only works if the *Ignore Password on update* field is turned OFF. If *Action* field is set to Add, enter **1** for **Yes** (to send the Welcome email with the randomly generated password as soon as this upload completes) or **0** for **No** (to not send the email and instead apply the password entered in the required *Password* field).
(Column BM) DisabledCreatePresentationFromWizard	Required field. This field determines whether to disable the ability for the user to create presentations from wizards. Enter **1** for **disabled** or **0** for **enabled**.
(Column BN) SSOKey	The string identifier that your company's identity provider will pass to Brainshark to identify this user for single sign on. Contact Brainshark Support for assistance with this field and SSO.
(Column BO) ReceiveGettingStarted	Required field. This field determines whether to send the user the Getting Started email series of 4 (four) new user emails. Enter **1** for **Yes** and alert the user that these helpful emails are going to arrive so that they don't think they are spam. Enter **0** for **No** if you don't want the emails sent.

Column Header	Column Value
(Column BP) ReceiveViewingActivitySummary	Required field. This field determines whether to automatically send the user the Viewing Activity Summary Report for all presentations the user Authors/creates. Enter **1** for **Yes** to send the report. Enter **0** for **No** if you don't want the report sent.
(Column BQ) ReceiveAdminNews	Required field. This field determines whether to send the user the Administrator News.
(Columns BR…BW) Custom5…Custom10	These fields are available to store custom data for the user.
ReceiveViewReceipts	This field determines whether to send the author or referring user a View Receipt after every view.

Groups

The following table includes the Column Headers you will see in the Batch User Upload Spreadsheet for Group Uploads as well as the corresponding Column Values to include depending on the action you would like to take. For User Upload fields, please see the Fields for User Uploads section above. If you are including a Group Upload along with a User Upload, be sure to use a separate spreadsheet.

Column Header	Column Value
(Column A) Action	**Add**=create the group. Entering this value for a group that already exists will cause an error. **Update**=update the description. Entering this value for a group that does not exist will cause an error. **Delete**=delete the group. Entering this value for a group that does not exist will cause an error. Leaving this field empty will add the group if it doesn't exist, update if it does*. The group name cannot be modified using this process. It must be updated manually.*
(Column B) CompanyDirectory	The login directory for the company. For example, if your Brainshark Site URL is www.brainshark.com/yoursite then enter "yoursite" in this column. Do not enter the complete URL. All values in this field must be the same for the entire Batch Upload Spreadsheet. Any rows that contain a different value for CompanyDirectory than the value in the first row will not be added.
(Column C) GroupName	The name of the group to be added. The combination of CompanyDirectory and GroupName are used to determine if the group exists. Matching for GroupName is case insensitive. GroupName cannot be changed using this field. GroupName must be the name of an existing user group in your Brainshark site. It cannot be "All Company Users" or "Administrators".
(Column D) Description	Description of the group.

Automating Completion of the Batch User Upload Spreadsheet

How you wish to populate the *User Batch Upload* spreadsheet is your choice. Perhaps you choose to manually complete the spreadsheet, or perhaps you choose to write a program that will populate the form based on a feed from an HRIS or LDAP database. Any development required to automate the process of populating the spreadsheet is the responsibility of the customer. Regardless of the method used to populate the data, the instructions above for *Completing the Spreadsheet* must be followed.

Ongoing Updates

Once you have completed the initial loading of users, you may still need to maintain those users going forward. Whether that's adding new users, or modifying the records of existing users, this can be handled using the *Batch User Upload* spreadsheet, or by manually editing the users through the Administration module. If you intend to use the *User Batch Upload* process for this ongoing maintenance, Brainshark requests that you only send the delta moving forward; that is, only send a spreadsheet representing the new or modified users. If a user record is not changing, then it does not need to be sent every time. The *User Batch Upload* spreadsheet provides an 'Action' column that is used to designate the action Brainshark should apply.

Uploading the Batch User Spreadsheet

When you are ready to start the actual upload, you have two options: you can run it yourself or you can have Brainshark do it for you. We've created an executable that you can run, which automatically sends the Batch User Upload Spreadsheet to Brainshark for processing.

If you have completed the *Batch Upload User Spreadsheet* and are ready to send it to Brainshark Support for upload, you may do so now via email.

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