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Securing Brainshark Content and Identifying Presentation Viewers

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Introduction

As Brainshark users become more prolific in creating presentation and learning content, they become more aware and concerned about securing the privacy of their content. Authors want to ensure that their internal corporate presentations and product information is accessible by only those privileged to view it.

This document outlines various content-centric scenarios and how Brainshark is able to ensure that the viewing of content is as open or limited as the customer requires.

A Quick Review

Brainshark has always allowed content to be created and viewed as either Public presentations (content that may be viewed without a Brainshark Login Account) or Private presentations (those requiring a Brainshark Login Account to enable viewing). Brainshark Rapid Learning courses are always considered Private.

Creating Private content is the primary means to securing access to Brainshark content. This document addresses the posting of Brainshark content URLs on both public and private web pages and through email. Several methods for identifying the content 'viewer' are also discussed, however, 'requiring a login' to access the content remains the primary tenet for securing Brainshark content.

In conjunction with the creation of Private Content or Rapid Learning content, Brainshark User Accounts must be created to gain proper access. User accounts may be created in several ways. These methods are discussed as part of this document.

Posting Brainshark Content

Brainshark offers its authors and administrators a variety of methods for inviting audiences to view their content. These scenarios will illustrate issues related to both Public and Private content.

Posting via Email

As part of the Brainshark core product, authors and administrators may send email invitations to potential 'viewers'. This process embeds the Brainshark URL into the email body. Email may be formulated and sent outside of Brainshark (i.e., marketing campaigns). This email would also contain the Brainshark presentation URL. Please refer to *Finding and Using the Brainshark Presentation Link* – later in this document.

Email and Public Content

It may be important, even for Public content, to discern the identity of the 'viewer'. Techniques to capture this information include:

1. Enabling a Guest Book on the presentation
2. Attaching a 'tracking code' to the presentation URL. Marketing campaigns often use the recipient's email address as the tracking code. The tracking codes may be extracted using one of the Brainshark Viewing Reports. An example of the tracking code syntax is:

http://www.brainshark.com/customersite/vu?pi=12345&text=tracking_code

Email and Private Content

Private content prompts the 'viewer' for their Brainshark login credentials. Once the credentials are entered, presentation viewing proceeds.

Alternatives to prompting the 'viewer' for their credentials include (these alternatives assume the existence of a Brainshark User Account – see *Creating Brainshark Users*):

- **Single Sign-on (SSO)** – please refer to the *Single Sign-on Data Sheet* in the Appendix of this document. This technique will work for embedded links in email as long as the 'viewer' is logged into their hosting network.
- **Login-and-Go** – please refer to the *Login-and-Go Data Sheet* in the Appendix of this document. This technique may be used from email if a universal privileged user account is used to 'log in' to Brainshark. The individual's identify, with this technique, may not be discernable.

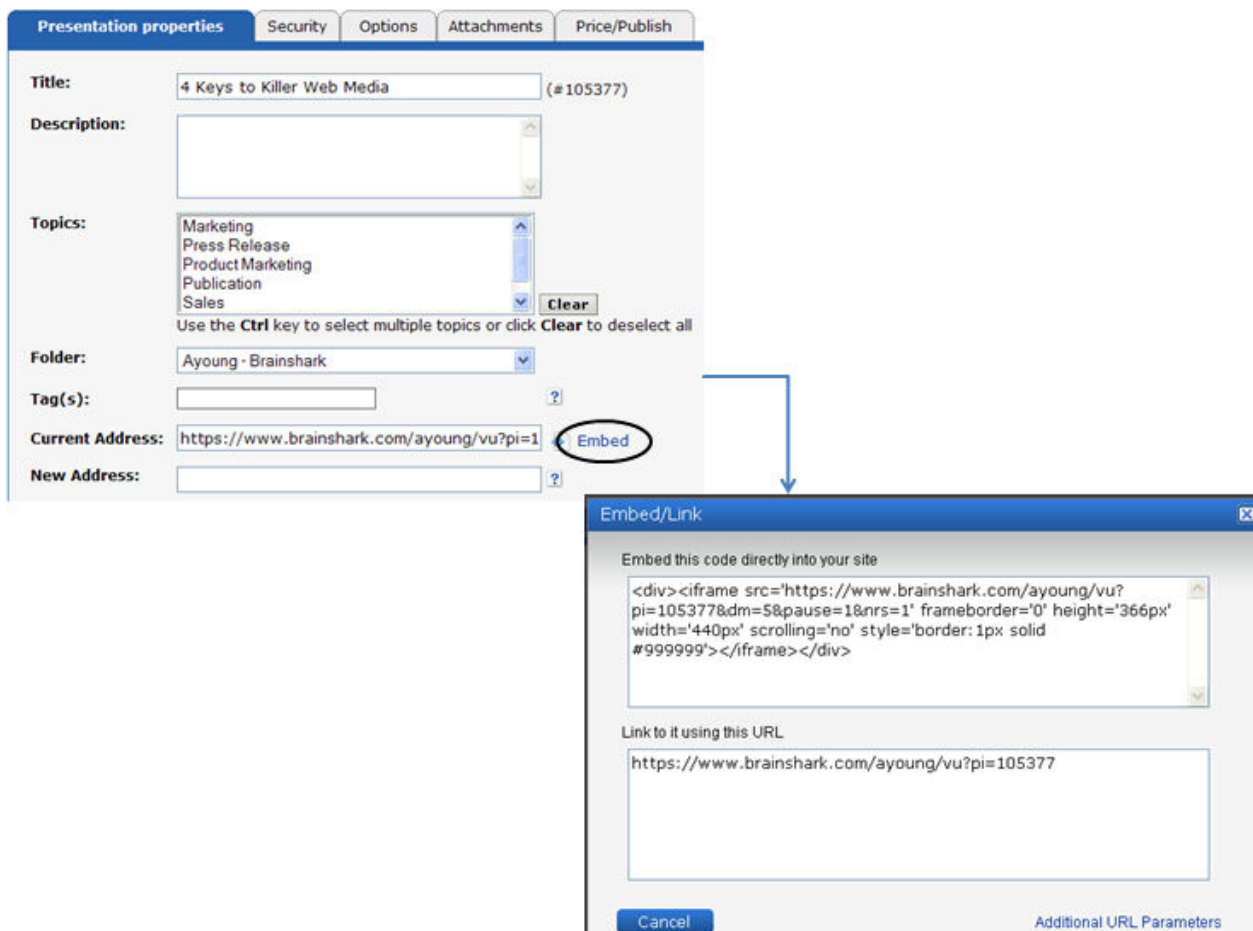
Posting via Customer Web Page

As part of the core product, Brainshark makes the web links (URLs) readily available for use on a Web Page or within any HTML framework. In addition, Brainshark provides the 'embed code' to allow the Brainshark Player to be embedded within an HTML page.

Finding and using the Brainshark Presentation Links

These links are available to content authors and administrators:

1. Login to your Brainshark site
2. Find and Edit the Brainshark content to be 'posted'
3. On the Presentation Properties tab, click the *Embed* hyperlink to expose the Brainshark URL and the Embed Code to place into your web page



Using the Brainshark Presentation URL

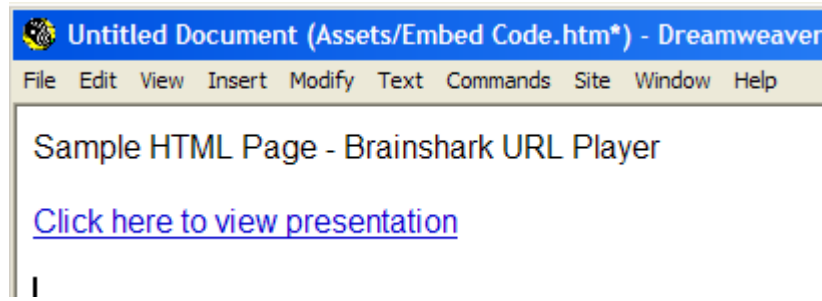
The HTML code to create a hyperlink from the Brainshark URL would look similar to:

```
<body bgcolor="#FFFFFF">

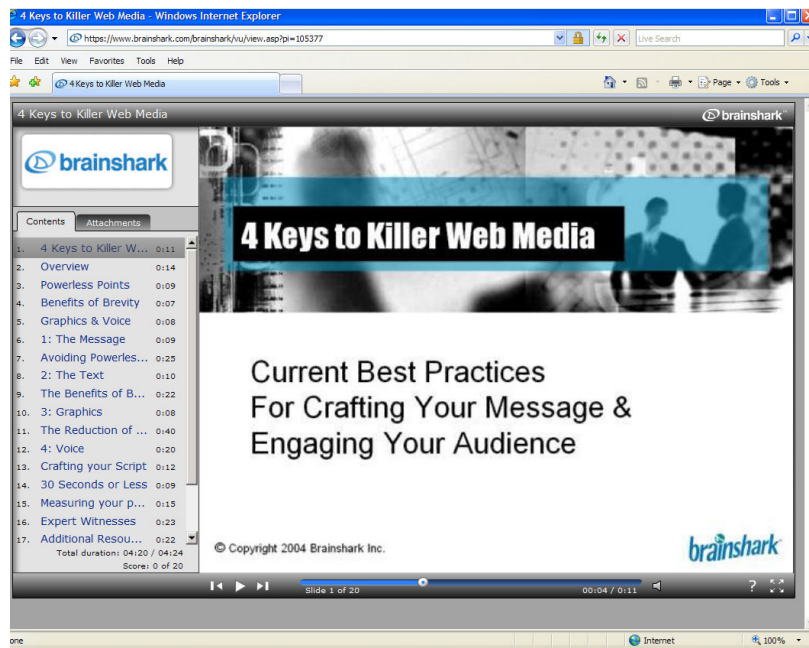
<p><font face="Arial, Helvetica, sans-serif">Sample HTML Page - Brainshark URL
Player </font></p>

<p><font face="Arial, Helvetica, sans-serif"><a
href="https://www.brainshark.com/ayoung/vu?pi=105377">Click here to view
presentation</a></font></p> <p>&nbsp;</p>

</body>
```



Clicking this hyperlink will result in launching the Brainshark Player – shown below:



Using the Brainshark Presentation Embed Code

The code to use the embedded URL is shown below:

```
<body bgcolor="#FFFFFF">

<p><font face="Arial, Helvetica, sans-serif">Sample HTML Page - Embed Brainshark
Player </font></p>

<div><iframe
src='https://www.brainshark.com/ayoung/vu?pi=105377&dm=5&pause=1&nrs=1'
frameborder='0' height='366px' width='440px' scrolling='no' style='border:1px
solid #999999'></iframe></div>

</body>
```

Clicking this thumbnail will result in launching the Brainshark Player – shown below:

Sample HTML Page - Embed Brainshark Player



Public vs. Private Content on Secure and Open Web Pages

There are two factors involved to properly determine the correct 'authentication method' for your environment. The first is whether the Presentation is Public or Private. And the second is whether or not the web page hosting the presentation URL is secure (requires a login).

Public Content: Retrieving Viewer Information

Public content does not require a log-in whether or not the hosting page is secure. It may be a requirement, however, to capture information about the 'viewer'. The two scenarios below describe methods for retrieving viewer information:

Public Content on a Public Web Page

In this scenario, the Brainshark link (URL) for a Public presentation is posted on a public web page. Viewer information may be retrieved by enabling a Guest Book prior to viewing the presentation.

As an author or administrator:

1. Login to your Brainshark site
2. Find and Edit the Brainshark content to be 'posted'
3. On the Presentation Properties tab, enable the Guest Book and Edit to select the fields to capture



Public Content on a Secure Web Page

With a secure web page, it is assumed that the 'viewer' has already logged-in – either explicitly to the web page or indirectly through a Single Sign-on environment with the customer's web environment. In either case, information about the 'viewer' is known and available to the web page and may be extracted and sent to Brainshark.

The simplest way to send the 'viewer' information to Brainshark is by extending the posted Brainshark URL (or embed code – see examples above) with Query Strings allowing the information to be 'silently' passed into the Guest Book fields of the Brainshark Presentation view.

For example, to launch the Brainshark presentation and identify the 'viewer' by first and last name, the URL would look like:

<https://www.brainshark.com/ayoung/vu?pi=105377&fn={firstname}&ln={lastname}>

where

&fn passes the First Name into the Guest Book

&ln passes the Last Name into the Guest Book

{firstname} is the value of the First Name fetched by the web page code

{lastname} is the value of the Last Name fetched by the web page code

A complete set of Guest Book query string parameters is included in the Data Sheet: *Pre-Filling Guest Book Data* – found in the Appendix.

Private Content on a Secure Web Page

With a secure web page, it is assumed that the 'viewer' has already logged-in – either explicitly to the web page or indirectly through a Single Sign-on environment with the customer's web environment. In either case, information about the 'viewer' is known and available to the web page and may be extracted and sent to Brainshark.

For this scenario, Brainshark offers the following alternatives to automatically log-in the 'viewer' and launch the presentation:

- Single Sign-on (SSO)
- Login-and-Go

Single Sign-on (SSO)

Brainshark's Single Sign-On (SSO) feature enables administrators to control access to Brainshark without the hassle of managing and maintaining individual user accounts for an additional application. For individuals that authenticate through their network or other sites, it provides streamlined access to Brainshark without the need for users to log in multiple times.

Brainshark's SSO implementation uses the following protocols: SAML 1.1, SAML 2.0, WS Federation.

A brief data sheet is found in the Appendix of this document. A complete specification is available for customer review. Brainshark Professional Services is available to answer questions and review your current SSO implementation and see how Brainshark may be able to work within your environment.

Login-and-Go

The Brainshark LoginandGo function allows for the *programmatic* launching of *private* Brainshark content (requires a Brainshark Login Account). For example:

- Brainshark *private* content URLs are embedded within a secure customer portal page. As an alternative to single-sign-on and to improve the viewer experience, LoginandGo may be used to pass account login information and initiate content viewing
- Alternatively, if Brainshark accounts do not exist for each Portal User, viewer information may be passed as Guest Book data while the Brainshark login is performed against a single privileged Brainshark account

A detailed data sheet may be found in the Appendix of this document.

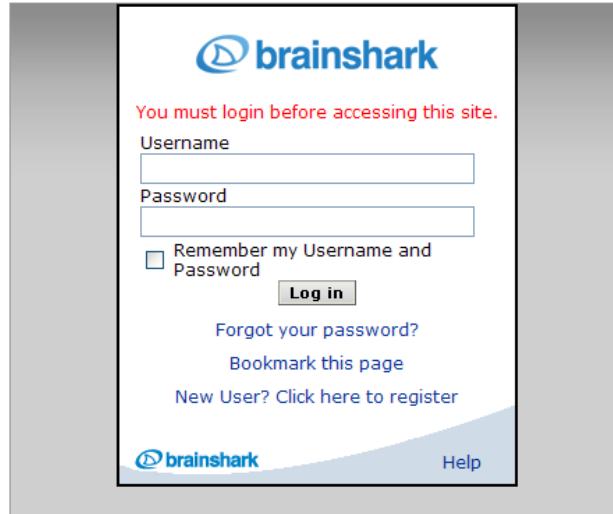
Brainshark Professional Services is available to answer questions and review your current implementation and see how Brainshark may be able to work within your environment.


Private Content on a Public Web Page

Private content requires a Brainshark login account. Posting a Brainshark URL or Embedded Player link to a Brainshark presentation that is marked Private results in the 'viewer' being prompted for their username and password.

For example, the embedded player link used above now points to Private Content and displays:

Sample HTML Page - Embedded Brainshark Player



 **brainshark**

You must login before accessing this site.

Username


Password

Remember my Username and Password

[Forgot your password?](#)

[Bookmark this page](#)

[New User? Click here to register](#)

 **brainshark** [Help](#)

Brainshark Rapid Learning

Brainshark courses and curricula are Private content. Not only do they require a student enrollment, they require a login to access and 'take' the learning content. Once enrolled into courses / curricula, students are invited to 'take' the learning content in several ways:

- Via Email (URL to Learning Locker, URL directly to Learning content, URL to 'auto-login')
- Posted URL (to Learning Locker, directly to Learning content)

Accessing Learning via Email

Students may be emailed a variety of invitations to 'take' Brainshark courses / curricula. The contents of the email may direct the student to:

- Their Brainshark Learning Locker where they may 'take' the course already enrolled for them or enroll themselves in Open Courses. The link to the Learning Locker prompts the Student for their Brainshark login credentials. For example:

From: noreplies@brainshark.com
To: amieyoung@comcast.net
Sent: Thursday, March 25, 2010 3:50:32 PM GMT -05:00 US/Canada Eastern
Subject: Brainshark Registration Confirmation

Nate,

Welcome! You have been set up with a Brainshark login.

To access Brainshark, please visit:

<https://www.brainshark.com/ayoung>

Username: amieyoung@comcast.net

Password: W2

Please visit the following URL for a training presentation on creating, editing and viewing Brainshark presentations:

<http://www.brainshark.com/brainsharkinc/AuthoringBasics?tx=sr>

Thank You!

- A specific course or curriculum (URL) – where they are immediately directed to the learning content for viewing. Prior to viewing the student is prompted for their Brainshark login credentials. For example:

From: noreplies@brainshark.com Sent: Thu 3/25/2010 3:4
To: Young, Arnie
Cc:
Subject: You are registered in: 4 Keys to Killer Web Media

Course Invitation

You are registered to take the course: 4 Keys to Killer Web Media (130399), by: Young, Professional Services Manager, Arnie.

To take this course click on this URL or copy it into the address field in your browser:

<https://www.brainshark.com/ayoung/vu?pi=130399>

If you are a new user, navigate to the URL shown above and click on "New User? Register here." for your User ID and Password.

NOTE:

If the Brainshark site containing the learning content is SSO Enabled and the student accesses their email after authenticating (logging in to) on the customer network, Brainshark will

validate the student's credentials through SSO and automatically log them in to the learning content.

- An 'auto-login' link directing them to a specific course or curriculum **without** having to provide their Brainshark login credentials. The Brainshark Author or Administrator may enable 'auto-login' for Rapid Learning. This feature invites a specific student to 'take' specific learning content without having to login. The student is automatically identified through the URL provided. For example:

From: noreplies@brainshark.com Sent: Thu 3/25/2010 3:
To: Young, Arnie
Cc:
Subject: You are registered in: 4 Keys to Killer Web Media

Course Invitation

You are registered to take the course: 4 Keys to Killer Web Media (129874), by: Young, Professional Services Manager, Arnie.

To take this course click on this URL or copy it into the address field in your browser:

<https://www.brainshark.com/ayoung/2101cc6a-93b7-4bf2-a5ef-9ce37283538f/al/>

If you are a new user, navigate to the URL shown above and click on "New User? Register here." for your User ID and Password.

Accessing Learning via Web Page Links

Customers may wish to post links to their learning content on secure web pages. Students access these links by logging into the secure web pages or through the customer's Single Sign-on (SSO) deployment. To simplify the Brainshark Student experience, Brainshark offers several options to 'silently' log the student into Brainshark.

Single Sign-on (SSO)

Brainshark's Single Sign-On (SSO) feature enables administrators to control access to Brainshark without the hassle of managing and maintaining individual user accounts for an additional application. For individuals that authenticate through their network or other sites, it provides streamlined access to Brainshark without the need for users to log in multiple times.

Brainshark's SSO implementation uses the following protocols: SAML 1.1, SAML 2.0, WS Federation.

A brief data sheet is found in the Appendix of this document. A complete specification is available for customer review. Brainshark Professional Services is available to answer questions and review your current SSO implementation and see how Brainshark may be able to work within your environment.

Login-and-Go

The Brainshark LoginandGo function allows for the *programmatic* launching **of Brainshark learning content** . For example:

- Brainshark learning content URLs are embedded within a secure customer portal page. As an alternative to single-sign-on and to improve the viewer experience, LoginandGo may be used to pass account login information and initiate content viewing

A detailed data sheet may be found in the Appendix of this document.

Brainshark Professional Services is available to answer questions and review your current implementation and see how Brainshark may be able to work within your environment.

Embedded Brainshark Player for Learning

By combining the Login-and-Go function with the Embedded Brainshark Player URL, a posted link may show the learning content within the secure web page after providing Brainshark with the appropriate student login credentials. A sample might look like:

```
<body bgcolor="#FFFFFF">

<p>Sample - LoginandGo with Secure Content</p>

<div><iframe
src='https://www.brainshark.com/brainshark/public/login/loginandgo.asp?cid=9022&uid=xyz@brainshark.com&pwd=12345&dest=%2Fbrainshark%2Fvu%2Fview.asp%3Fpi%3D105377%26dm%3D5%26pause%3D1%26nrs%3D1' frameborder='0' height='366px' width='440px'
scrolling='no' style='border:1px solid #999999'></iframe></div>
```

Embedded Learning Locker

Another option afforded the customer is to post the student's Learning Locker within the web page. This technique also uses loginandgo to authenticate the student and then launches the learning locker within an iFrame. A sample code snippet follows:

```
<div><iframe
src='http://www.brainshark.com/brainshark/public/login/loginandgo.asp?CID={company id}&UID={username}&PWD={password}&DEST=%2Fbrainshark%2Flearning%2FMyLearning.asp%3Fca%3D4%26ui%3D16385&dm=5&pause=1&nrs=1' frameborder='0'
height='366px' width='1000px' scrolling='no' style='border:1px solid #999999'></iframe></div>
```

Launching the Learning Locker in an iFrame using LoginandGo

[My Current Enrollments](#) | [My Prior Enrollments](#)

Current Enrollments for Arnie Young, Professional Services Manager

Courses you are enrolled in are listed below. Click a course title to review details or take a course.

Individual Courses						
Course Name	Status	Topic	Expiration	Passing Score	Type	Duration
Harvard Course	Enrolled			n/a	Jenn Course	No Audio
ILT101	Enrolled			n/a	ILT	No Audio
Sample Animation	Enrolled			n/a	Brainshark	0:33
Sample Course - May	Incomplete			100%	Brainshark	No Audio
Stanford ILT	Enrolled	Product Marketing		n/a	ILT	No Audio

Curriculums				
Curriculum Name	Status	Topic	Credits	Complete
Sample Curriculum	Incomplete	Sales	0	0 of 1

Creating Brainshark User Accounts

As discussed in the Introduction, properly securing content requires that the content be marked 'Requires Log-in' and that all users requiring access to the content have a Brainshark User Account. There are several methods for creating Brainshark User Accounts – detailed in this section.

Creating User Accounts – Brainshark Administrator

A Brainshark Presentation is available on the Custom Connection Online (CCO) instructing Administrators on how to manage Brainshark user accounts. Please refer to:

<https://www.brainshark.com/documentation/manageusers>

Creating User Accounts – Self Registration

Brainshark Administrators may enable the Self Registration feature to permit their students to 'sign up' for a Brainshark User Account and be automatically enrolled into courses / curricula. To learn more about the proper set up of Self Registration, please refer to the Brainshark Presentation:

<http://www.brainshark.com/brainshark/vu/view.asp?pi=841647474>

Creating User Accounts – Single Sign-on

For students located and logged into their corporate network while accessing Brainshark training, the customer may take advantage of the Single Sign-on implementation. This approach integrates Brainshark with the customer's authentication server to validate the student's credentials as they access Brainshark training while on their corporate network. As students are authenticated, Brainshark will create User Accounts for them if not already existing. Please refer to the *Single Sign-on Data Sheet* in the Appendix of this document.

Creating User Accounts – Brainshark Web Services APIs

To meet a company's student workflow, it may be more effective to programmatically create Brainshark User Accounts as needed. The Brainshark Web Services APIs provide a .NET programming library of 'calls' into the Brainshark system to create, modify and query Brainshark database objects. Writing code to create new users and assign them to learning content is a straight-forward programming exercise. Brainshark offers its APIs and Engineering assistance to facilitate this method.

Creating User Accounts – Bulk Uploading Users

Brainshark provides a stand-alone program to allow users to create and modify user accounts in bulk. This function is quite effective for large user communities that frequently change. It's also perfect for the initial population of a learning or secure content user base. Please refer to the *Bulk Uploading Users Data Sheet* in the Appendix of this document.

Brainshark's Web Services / APIs

Also known as Brainshark's SDK (software developer's kit), Brainshark provides a full set of Web Services APIs for customers to develop their own applications that integrate into their Brainshark site.

Written for .NET developers, the APIs contain:

- Methods: CreateSession, DeleteSession
- Generic Operations: Get, List, Set, Create, Copy, Delete, Purchase, SendEmail

Within the context of this security-oriented document, some examples for using the SDK are:

- Programmatically create new user accounts and enroll them in a set of learning content (e.g., extracting information from user login to a secure company web page)
- Emulate an SSO authentication when one is not available
- Dynamically build a web page of Brainshark URLs available to a 'viewer' based upon his login credentials

Brainshark Professional Services will work with you to discuss your project and how the APIs may be best used. Please ask for full documentation on the Brainshark SDK.

Appendices



Pre-filling Guestbook Data

If you have a site or portal that requires authentication and you place Brainshark presentation links on pages in the site, then you can pass viewer information to Brainshark via the URL string. It is possible to pass values for any Guestbook field so that Brainshark will store the data with the viewing information. You do not need to enable the Guestbook for the presentation, but your Brainshark Administrator should label the custom fields for which you will be capturing data. Reference the [Administration Quick Reference Guide](#) for instructions on how to *Define Guestbook Fields*.

Parameters

The following query string values are available for use during a presentation viewing:

Parameter	Field
&fn	First name
&ln	Last name
&em	E-mail address
&cn	Company name
&dp	Department
&ti	Title
&bp	Business Phone
&c1	Custom field 1
&c2	Custom field 2
&c3	Custom field 3
&c4	Custom field 4
&c5	Custom field 5
&c6	Custom field 6
&c7	Custom field 7
&c8	Custom field 8
&c9	Custom field 9
&c0	Custom field 10

Notes and Examples

When the author customizes the presentation URL by replacing the presentation ID with text, the first query string value appended to a URL uses a question mark (?) instead of an ampersand (&) as noted above.

- For example, to view presentation ID 25545678 and pre-fill the viewer's first name and last name use this form for the URL:

<http://www.brainshark.com/mycompany/vu?pi=25545678&fn=<<firstname>>&ln=<<lastname>>>

However, if you use the "New Address" function to change the presentation URL to a more descriptive name, such as EarningsReport, and you want to pre-fill the viewer's department, use this form for the URL:

<http://www.brainshark.com/mycompany/EarningsReport?dp=<<department>>>

In the example above, if you would also like to capture Title and Custom Field 1, use this form for the URL:

<http://www.brainshark.com/mycompany/EarningsReport?dp=<<department>>&ti=<<Title>>&c1=<<Customfield1>>>

Reporting

The Guestbook data that is captured in this manner can be accessed via all standard Brainshark reports which are set to display Guestbook data; including Viewing Details, Question Details and Viewer Clickpath Details reports.

Brainshark Support for Single Sign-On (SSO)

Fast, Secure Account Creation and User Authentication

Brainshark's Single Sign-On (SSO) feature enables administrators to control access to Brainshark without the hassle of managing and maintaining individual user accounts for an additional application. For individuals that authenticate through their network or other sites, it provides streamlined access to Brainshark without the need for users to log in multiple times.



Secure Internet SSO allows organizations to provide users safe access to applications across the Internet without the need to re-login.

Other Benefits

Enhanced Security

Because Software as a Service (SaaS) applications require login to a web site, maintaining control over logins and permissions can be an added challenge for users and for IT support staff. Brainshark's SSO feature supports the most common security protocols used by identity providers. Administrators can limit employee access to a specific set of applications, and easily terminate that access to all systems at once when an employee leaves the company.

Compliance

Brainshark's SSO feature supports even the most rigidly enforced security requirements from IT departments.

Reduced Help Desk Costs

The most frequent IT Help Desk inquiries are from users who have forgotten their password or who have login difficulties. By enabling users to log in to Brainshark (and other applications) through a single sign-on process, you'll dramatically reduce the occurrence of these incidents.

Increase User Adoption Rate

Creating and managing user accounts can be a very cumbersome process – to the point of inhibiting an application's widespread rollout. With features to auto-create and auto-associate users, our SSO feature enables you to expand Brainshark access with ease.

Supported Protocols

SAML 1.1, SAML 2.0, or WS Federation



Login-and-Go Function

The Brainshark LoginandGo function allows for the *programmatic* launching of *private* Brainshark content (requires a Brainshark Login Account). For example:

- Brainshark *private* content URLs are embedded within a secure customer portal page. As an alternative to single-sign-on and to improve the viewer experience, LoginandGo may be used to pass account login information and initiate content viewing
- Alternatively, if Brainshark accounts do not exist for each Portal User, viewer information may be passed as Guest Book data while the Brainshark login is performed against a single privileged Brainshark account

The following examples describe the proper execution of the Brainshark LoginandGo function. It is assumed that the customer will write code on the web page to extract the parameters provided during execution.

SAMPLE 1

The HTML below demonstrates a Post Method of logging into a Brainshark site and viewing a *private* presentation (one requiring login). This invocation assumes that the individual logged into the Customer Portal page has a Brainshark User Account:

```
<form name="Login" method="post"
action="http://www.brainshark.com/brainshark/public/login/loginandgo.asp" target=_blank>
<input type=hidden name="uid" value="ViewingUser Username">
<input type=hidden name="pwd" value="ViewingUser Password">
<input type=hidden name="cid" value="CID">
<input type=hidden name="dest" value="/brainshark/vu/view.asp?pi=PID">
<input type=submit value="Start Sample" ID="SubmitLogin">
</form>
```

Where –

UID is the Username of the individual being logged into Brainshark
PWD is the Password of the individual being logged into Brainshark
CID is the Brainshark Company ID
DEST is the Destination – in this case the URL of the presentation to be viewed
PID is the Presentation ID to be viewed

SAMPLE 2

Alternatively, you may call LoginandGo from a single URL with parameter passing:

<http://www.brainshark.com/brainshark/public/login/loginandgo.asp?uid={username}&pwd={password}&cid={Brainshark sharkive id}&dest=/brainshark/vu/view.asp?pi={PID}>

The above will take the user directly to the sharkive and 'silently' log-in the user specified

Where –

UID is the Username of the individual being logged into Brainshark
PWD is the Password of the individual being logged into Brainshark
CID is the Brainshark Company ID
DEST is the Destination – in this case the URL of the presentation to be viewed. The URL is encoded
PID is the Presentation ID to be viewed

130 Turner Street
Building 1, Suite 100
Waltham, MA 02453
T: 781.370.8000
F: 781.370.8202

Login-and-Go Function

SAMPLE 3

A second alternative to launching private content uses the UCI (unique company identifier) associated with each Brainshark User Account. This avoids having to expose the username and password:

<http://www.brainshark.com/brainshark/public/login/loginandgo.asp?uci={unique user id}&cid={Brainshark sharkive id}&dest=/brainshark/vu/view.asp?pi={PID}&fn={firstname}&ln={lastname}>

Where –

UCI is a Unique Company Identifier (text or numeric value); this is associated with the User Account within Brainshark
CID is the Brainshark Company ID
DEST is the Destination – in this case the URL of the presentation to be viewed. The URL is encoded
PID is the Presentation ID to be viewed
FN, LN are a sample of Guest Book parameters that may be passed to Brainshark and used to identify the viewer in Brainshark Viewing Reports. A complete set of Guest Book query strings is listed below

Brainshark Guest Book Query Strings

&fn	First name.	&c3	Custom field 3
&ln	Last name.	&c4	Custom field 4
&em	E-mail address.	&c5	Custom field 5
&cn	Company name	&c6	Custom field 6
&dp	Department.	&c7	Custom field 7
&ti	Title.	&c8	Custom field 8
&bp	Business Phone.	&c9	Custom field 9
&c1	Custom field 1.	&c0	Custom field 10
&c2	Custom field 2		

Bulk Uploading Users to Brainshark

What is User Bulk Upload?

The User Bulk Upload function is a Windows command-line application that may be run by the customer to upload and update Brainshark User Accounts.

The bulk upload of users offers an alternative to individually adding users to Brainshark through the Administration module. This function allows customers to load a large number of users into the system at once, as well as maintain those users on an ongoing basis. Some customers may choose to use this process if they have a large number of Brainshark authors, or if they are rolling out the Brainshark Rapid Learning solution, and as such have a large volume of students / employees that need to be created.

Preparing Your User Data for Upload

The source of user information used by the Bulk Upload function is contained within a formatted Spreadsheet prepared by the customer. This spreadsheet contains all the information necessary to create or update a user account within Brainshark. This document must be filled out in its entirety in order for the upload process to be successful. Please ask your Customer Success Consultant for a complete User Manual and sample spreadsheet.

There are several questions that a customer should be considering before completing the *User Bulk Upload* spreadsheet. This will ensure that you are planning the right level of access and system privileges for your user community. Some things to consider are as follows:

1. Will you want individuals placed in groups?
2. Should each user have a personal authoring folder?
3. Which users will be Company Administrators?
4. Should users be given permission to maintain their own profile?
5. What features should a user have access to? (e.g. can they create questions, request guest authoring activity, create new presentations, etc)
6. Should users be set-up to receive Brainshark newsletters and new release notifications?
7. For customers using Rapid Learning, which users will be Learning Course Authors, versus Learning Managers or Learning Administrators?

Automating Spreadsheet Completion

It is at a customer's discretion as to how they wish to populate the *User Bulk Upload* spreadsheet. Some may choose to manually complete the spreadsheet while others may wish 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.

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 *User Bulk Upload* spreadsheet, or by manually editing the users through the Administration module. If you intend to use the *User Bulk 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 each time. The *User Bulk Upload* spreadsheet provides an 'Action' column that is used to designate which action applies.