

## Self-Registration

Self-registration streamlines the process of adding new users to your Brainshark site. Rather than adding them manually, or uploading in bulk, you can put the account creation process in the hands of your users, while maintaining control over what permissions each registrant has.

### Consider the Options

The process starts with at least one user profile to be used as a template and model for self-registration accounts. You set up all of the preferences and permissions that are used to create new accounts. You can have as many account templates as you wish, but only one can appear on the Login page. Links to other self-registration account templates can be posted on your intranet site or sent via email.

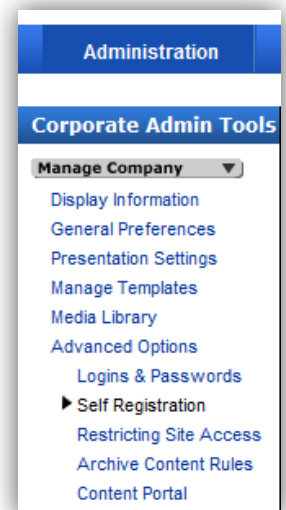
Although every company is different, there are a couple of ways to approach self-registration:

- **Create self-registration profiles for different departments or groups of users**, assigning permissions for each profile, then either email the self-registration link or post links to the self-registration profiles on your intranet site.
- **Provide a self-registration link on your login page**, by creating a standard profile that has minimal permissions. This gives you the opportunity to review each registrant to confirm the level of access, since some registrants should only have permissions, while others should have author or even administrative permissions. This option is also great for companies that plan to give every employee a Brainshark account.

### How to Enable Self-Registration

When you enable self-registration, Brainshark will automatically create a user profile called NEW\_USER.

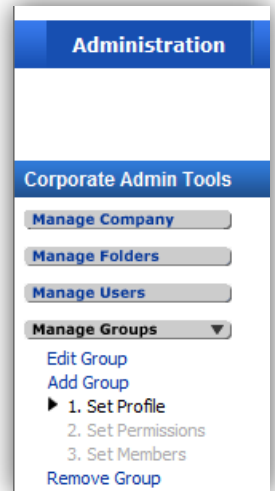
1. From **Administration**, select **Manage Company**.
2. Select **Advanced Options > Self Registration**.
3. In the *Enable self-registration section*, select **Yes**.
4. Select other self-registration options as desired:
  - a. **Require company name for self-registration**—use this option if you have more than one Brainshark site at your company or if you require registration for people outside of your company (e.g.: vendors, distributors, partners, customers).
  - b. **Show Self-Registration link on login page**—if you want to provide users with the option to self-register from the login page, select **Yes** to add a link for the default self-registration template you selected.
  - c. **Domain Restrictions**—you can enter one or more domains to restrict self-registration. You can allow or block users from the specified domain(s). For example: you could enter your company's domain and permit only users coming from this domain to register.



## How to Set-up Self-Registration Profiles

### Create a Group

Groups help you manage and organize users in your site. Since self-registration happens independently, creating a group and assigning permissions eliminates some of the tasks associated with adding users. Consider creating different groups based on the permissions you are assigning to each profile template. Or create one group without any permissions so you can confirm the new registrants and assign permissions as needed. If you already have created profiles for self-registration, you will have the opportunity to assign them to each group during the group setup process.

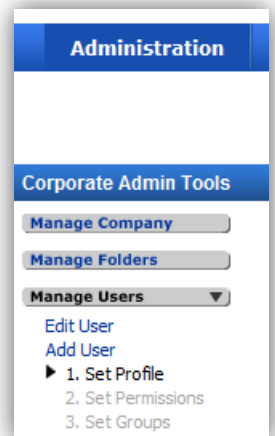


1. From **Administration**, select **Manage Groups**.
2. Select **Add Group**.
3. Enter the *Group Name* and the *Description*.
4. Set the *Folder permissions* for this Group. For example, if you would like new self-registrants to have only viewing access until you can review each profile, select the **Viewer** checkbox next to the folder(s) they need to access.
5. You will be prompted to set the members of this group. If you have not yet created profiles for self-registration, click **Submit** to skip this step and finish creating the group. If you have profiles to be used for self-registration already, locate and select them, then click **Submit**.

### Create Self-Registration Template Profiles

You'll create profiles to be used as templates for self-registration. You can create groups before or after this step. Whichever order you choose, you will have the opportunity to add the profile to any groups you create.

1. From **Administration**, select **Manage Users**.
2. Select **Add User**.
3. In the *Set Profile* section:
  - a. Enter the **User name** (See *Tips for Naming Your Self-Registration Profiles* section in the next section for suggestions).
  - b. Specify a **Password** which will be used for each account created with that template. Or select **Generate new password and notify user immediately**, to have Brainshark assign a temporary password the user must change on first login.
  - c. Enter the **First** and **Last name** (see *Tips for Naming Your Self-Registration Profiles* in the next section for suggestions)
  - d. Enter the **Primary e-mail address**. Although this field is required, the email address will not be used so you can enter a sample email address (user@company.com).



- e. Set desired **User properties**. For example, you can set whether the template will generate a personal authoring folder, or you could make the newly created account inactive by default then activate the account after registration. This gives you the option to review all new accounts prior to activating them.
  - f. Set desired **User privileges** for the profile.
  - g. Set desired **Communication preferences** for the profile.
4. Click **Continue**.
  5. In the *Set Permissions* section, select the Brainshark permissions for the profile. Any permissions you set here can be changed at the user account level once self-registration is complete.
  6. In the *Set Groups* section, select the group(s) that the profile belongs in.
  7. Click **Submit** to create the profile.

#### *Tips for Naming Your Self-Registration Profiles*

- If you have only one self-registration template, select a user name that will be easy to recognize in your user list. This will also assist you in searching through user accounts for your template.

##### **For example:**

- User name: self\_registration
  - First name: Self
  - Last name: Registration
  - Email: selfregistration@<yourdomain>.com
- If you have multiple self-registration templates, organized by department or permission level, name those appropriately. This naming convention also guarantees that the profiles will sort together on the Manage Users screen, or be returned together in Search Results, allowing you to find them more easily should edits be necessary.

##### **For example:**

##### **Sales Template**

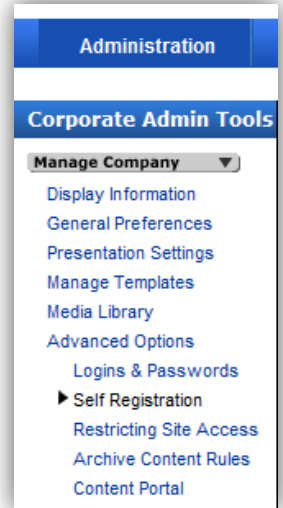
- User name: sales\_user
- First name: Sales
- Last name: User
- Email: salesuser@<yourdomain>.com

##### **Marketing Template**

- User name: marketing\_user
- First name: Marketing
- Last name: User
- Email: marketinguser@<yourdomain>.com

### Assign Template Profiles to Self-Registration

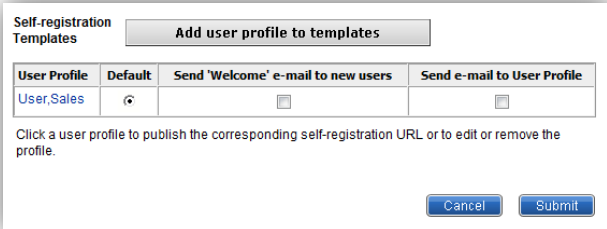
1. From **Administration**, select **Manage Company**.
2. Select **Advanced Options > Self Registration**.
3. In the *Self-registration Templates* section, click **Add user profile to templates**.
4. From the *Find a User* window, select the profile you want to use as a self-registration template by clicking the last name of the profile. If you need to, use the *Search* option at the top of the window. If you named your profiles as suggested in the *Tips for Naming Your Self-Registration Profiles* section, you can type **User** in the *Starts with* field to display all of the self-registration templates you created.
5. If you created more than one self-registration template, repeat steps 3 and 4 to add those additional self-registration templates.
6. Select the **Default** radio button next to the self-registration template you would like to present on the login page, should you decide to enable self-registration from the login page.



**NOTE:** one self-registration link can display on the login page.

7. Select **Send 'Welcome' e-mail to new users** to automatically generate an email including a link for the Brainshark site, username, and password, as well as an introduction to Brainshark. If you selected "change password on next login" the user will be asked to change his/her password on the next login.
8. Select **Send e-mail to User Profile** to receive an email each time a new user registers for an account through self-registration (regardless of how many self-registration account templates you have). You will be notified of the new username and the Brainshark URL the account is registered under so you can make any permission adjustments, or activate/deactivate the account, as necessary.

**NOTE:** this option is not available for the NEW\_USER profile automatically created by Brainshark when you enable self-registration.



User Profile	Default	Send 'Welcome' e-mail to new users	Send e-mail to User Profile
User,Sales	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>

Click a user profile to publish the corresponding self-registration URL or to edit or remove the profile.

Cancel Submit

## How to Deploy Self-Registration

After you have enabled self-registration and set-up the desired profile templates, you can deploy it in a number of ways. You can use the combination of these methods that best meets your needs:

- Publish a link to one self-registration template on the login page to your Brainshark site.
- Publish a link to one or more self-registration templates on a web page.
- Email the link(s) through your email client.

### *Publish a Link to Self-Registration on Your Brainshark Login Page*

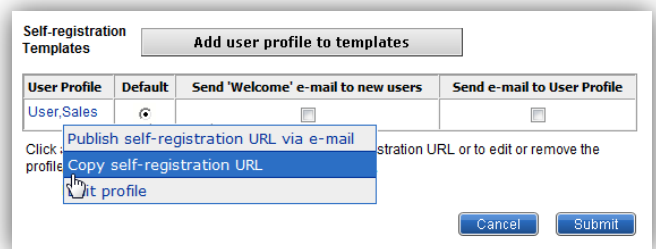
Publishing a link to self-registration on your Brainshark login page makes it easy for new Brainshark users to register for an account. Please note that only one self-registration template can be shown on the login page at a time.

1. From **Administration**, select **Manage Company**.
2. Select **Advanced Options > Self Registration**.
3. Select **Yes** in the *Show Self-Registration link on login page* section.

### *Publish a Link to Self-Registration on a Web Page*

Publishing a link or links to self-registration on a web page gives you the flexibility to provide self-registration options for your users. In addition, you may be able to more easily direct new users to registration through a web page than from your Brainshark site.

1. From **Administration**, select **Manage Company**.
2. Select **Advanced Options > Self Registration**.
3. Click the hyperlinked *User Profile* name.
4. Select **Copy self-registration URL**.
5. Paste the URL in the code for your webpage.



*Email the Link through Your Email Client*

You can take advantage of the ease of self-registration while maintaining complete control over who can register for an account by emailing a link(s) to the self-registration template of your choosing.

1. From **Administration**, select **Manage Company**.
2. Select **Advanced Options > Self Registration**.
3. Click the hyperlinked *User Profile* name.
4. Select **Publish self-registration URL via e-mail**.
5. A pre-populated email will open in your email client containing instructions and a link to the self-registration template. You can make edits to this email as necessary, but take care not to modify the hyperlinks contained in the message.
6. Edit the email as needed, address, and send.

