



Self-Registration

Introduction

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 the preferences that are used to create new accounts. You can have as many account templates as you wish, but only one can appear on your site's Login screen. Links to other self-registration templates can be posted on your website or sent via email.

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

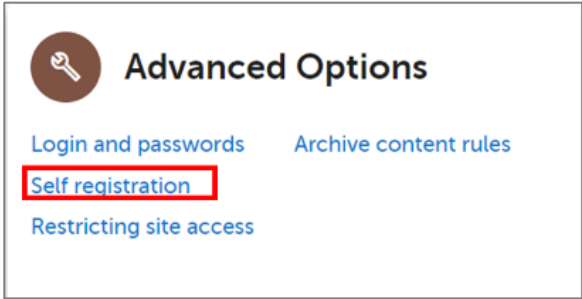
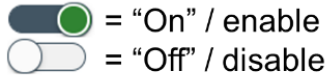
- **Create self-registration profiles for different departments or groups of users**, assigning permissions and privileges for each profile, then either email the self-registration link or post links to the self-registration profiles on your website.
 - **Provide a self-registration link on your login 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.
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Enabling Self Registration

Introduction When you enable self-registration, Brainshark will automatically create user profile called **NEW_USER**.

Enable Self-Registration Follow the steps below to enable self-registration in your site.

Step	Action
1	From Administration , select the “Advanced Options” card.
2	Click the “Self-registration” link. 
3	In the “Enable registration” section, slide the toggle to “On” to enable. 

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Enabling Self Registration, Continued

Enable Self-Registration, continued

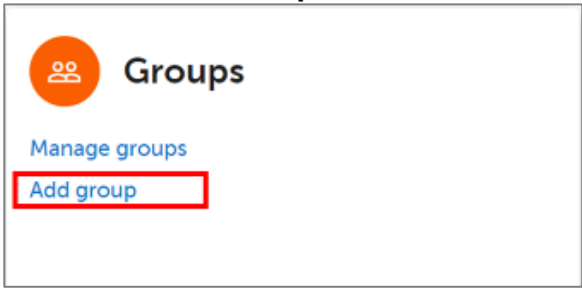
Step	Action
4	<p>Select other self-registration options sliding the toggle to “On” (Toggle is green) to enable or “Off” (toggle is white) to disable:</p> <ol style="list-style-type: none"> a. Require company name for self-registration—use this option if you have more than one Brainshark site at your company or if you require registration for people outside of your company (e.g.: vendors, distributors, partners, customers). 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, slide the toggle to “On/enable” 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.



Set -up Self Registration Profiles

Create Group (optional)

While creating a group is optional, Groups in Brainshark help you manage and organize users in your site. Groups are typically used for Formal Learning, or for companies that assign a Brainshark login to every employee or to distributors or partners. Consider creating different groups based on the permissions you are assigning to each profile template. Or, if you are enabling self-registration from your login screen, create a group so you can confirm the new registrants and assign permissions and privileges 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. You can use any existing groups you have set up in your site or follow the instructions below to create the groups you need.

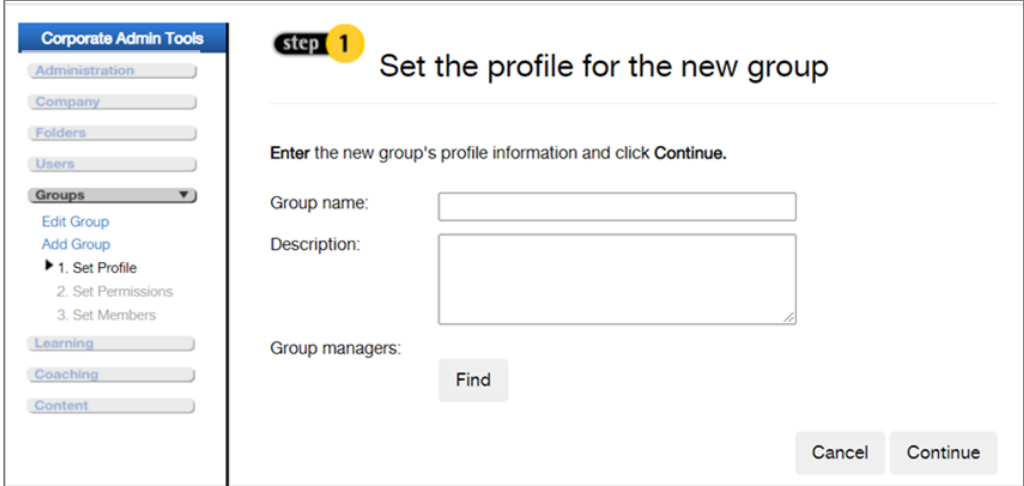
Step	Action
1	From Administration , select the “Groups” card.
2	Click the “Add Group” link. 
3	Enter the Group Name and the Description .
4	Assign Group Managers , if applicable.

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Set -up Self Registration Profiles, Continued

**Create Group
(optional),
continued**


Step	Action
5	<p data-bbox="321 619 576 653">Click “Continue”.</p> <div data-bbox="321 653 1339 1136"><p data-bbox="592 682 1144 745">step 1 Set the profile for the new group</p><p data-bbox="592 787 1047 819">Enter the new group's profile information and click Continue.</p><p data-bbox="592 840 1112 871">Group name: <input type="text"/></p><p data-bbox="592 882 1112 976">Description: <input type="text"/></p><p data-bbox="592 987 820 1050">Group managers: <input type="button" value="Find"/></p><p data-bbox="1112 1081 1315 1123"><input type="button" value="Cancel"/> <input type="button" value="Continue"/></p></div>

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Set -up Self Registration Profiles, Continued


Create Group (optional), continued

Step	Action																																								
6	<p>Set the folder permissions for this Group.</p> <p>For example, give new self-registrants viewing only access to folders, by checking the “Viewer” box for the folder(s) you will allow them to view the content, until such time that you can review each new user’s profile.</p> <div data-bbox="321 800 1321 1341" style="border: 1px solid black; padding: 5px;"> <p>Set the permissions for the "TRS Sales" group</p> <p>The  icon indicates that permissions to this folder are available through a parent group.</p> <p>Change the folder access permissions granted to this group and click Submit.</p> <table border="1" data-bbox="532 951 1313 1325"> <thead> <tr> <th>[Folder Name]</th> <th>Viewer <small>select all deselect all</small></th> <th>Author <small>select all deselect all</small></th> <th>Administrator <small>select all deselect all</small></th> </tr> </thead> <tbody> <tr> <td>▼ Tri-River Systems, Inc</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td> ▼ Coaching Video Examples</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td> ▼ Content Approval</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td> ▼ Documents</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td> ▼ GO1 SCORM Content</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td> ▼ Internal Only: WIP</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td> ▼ Marketing</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td> ▼ Internal Only: WIP</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td> ▼ Marketing</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table> </div>	[Folder Name]	Viewer <small>select all deselect all</small>	Author <small>select all deselect all</small>	Administrator <small>select all deselect all</small>	▼ Tri-River Systems, Inc	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼ Coaching Video Examples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼ Content Approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼ Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼ GO1 SCORM Content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼ Internal Only: WIP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼ Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼ Internal Only: WIP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼ Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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7	Click “Submit”.																																								
8	<p>Next, you will be prompted to set the members of this group.</p> <p>Note: If you have not yet created profiles for self-registration, click “Submit” to skip this step and finish creating the Group.</p>																																								



Create Self Registration Template Profiles

Create User Profile Template Create the user profile(s) to be used as a template for self-registration

Step	Action
1	From Administration select the “Users” card.
2	<p>Click the “Add User” link.</p> 
3	<p>In the Set Profile section:</p> <ol style="list-style-type: none"> Enter the Username (See <i>Tips for Naming Your Self- Registration Profiles</i> section in the next section for suggestions). 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. Enter the First and Last name (see <i>Tips for Naming Your Self Registration Profiles</i> in the next section for suggestions) 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 (<i>user@company.com</i>). 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. Set desired User privileges 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 on the user’s account once the 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 Self Registration Profiles

Tips for Naming Self Registration Profiles

If you have only one self-registration profile template, select a user name that will be easy to recognize in Manage Users. 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

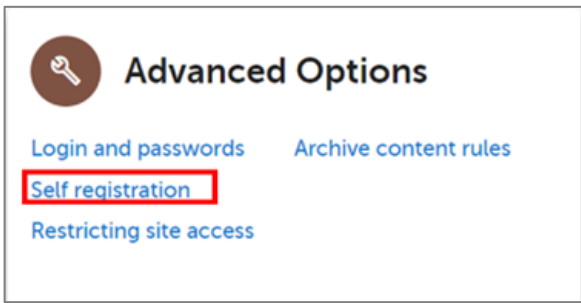
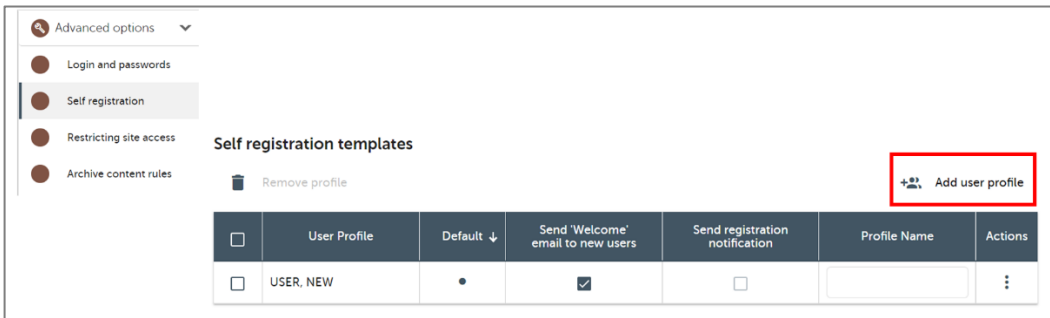
Marketing Template

- User name: marketing_user
 - First name: Marketing
 - Last name: User
 - Email: marketinguser@<yourdomain>.com
-



Assign Template Profiles to Self-Registration

Assign Templates to Self-Registration Once your self-registration profile templates are created and permissions assigned, you'll want to add the profiles to your site's self-registration.

Step	Action
1	From Administration , select the “Advanced Options” card.
2	Click the “Self-registration” link. 
3	In the Self registration templates section, click “Add user profile” . 
4	From the Find a user modal, check the box next to the profile you want to use as a self- registration template. <p>Note: To quickly locate a user profile, enter the name in the Search field. If you named your profiles as suggested in the <i>Tips for Naming Your Self Registration Profiles</i> section, you can type User in the <i>Search</i> field to display the self-registration templates you created.</p>



Find a user ×

×

User status
Active

Group
Select

<input type="checkbox"/>	User Name ↑	Last Name	First Name	Email
<input checked="" type="checkbox"/>	Mktg_User_999999	Self-reg	Mktg_User	Mktg_User_999999@trs.com
<input type="checkbox"/>	NEW_USER2319843	USER	NEW	new_user2319843@trs.com

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Cancel
Select

5 Click **“Select”**.

6 If you created more than one self-registration template, repeat steps 3 to 5 to add the additional templates.

7 Select the options for the self-registration templates:

Select the **Default** radio button next to the self-registration template you would like to present on your site’s login page, should you decide to enable self-registration from that page.

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

Self registration templates

Remove profile
 Add user profile

<input type="checkbox"/>	User Profile	Default ↓	Send "Welcome" email to new users	Send registration notification	Profile Name	Actions
<input type="checkbox"/>	USER, NEW	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	New User Self Reg	⋮
<input type="checkbox"/>	Self Reg Profile, Sales	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales Group Self Reg	⋮
<input type="checkbox"/>	Self-reg, Mktg_User	<input type="radio"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Marketing User Self Re	⋮

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Discard
Apply

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Assign Template Profiles to Self-Registration, Continued

**Assign
Templates to
Self-
Registration,**
continued

Step	Action
	<p>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.</p> <p>a. 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.</p> <p>NOTE: this option is not available for the NEW_USER profile automatically created by Brainshark when you enable self-registration.</p>



How to Deploy Self Registration

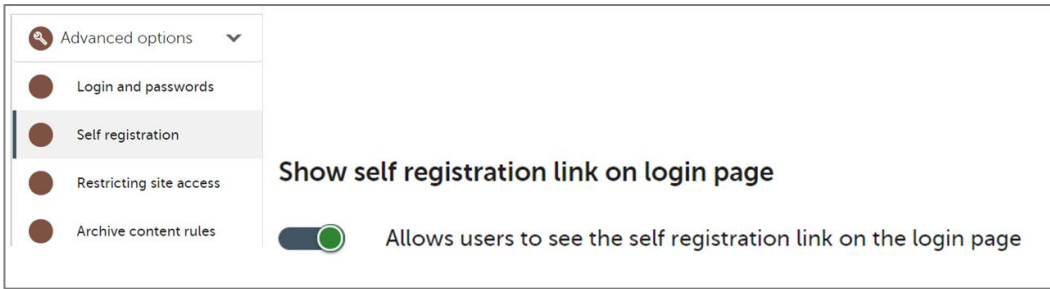
Deploy Self Registration

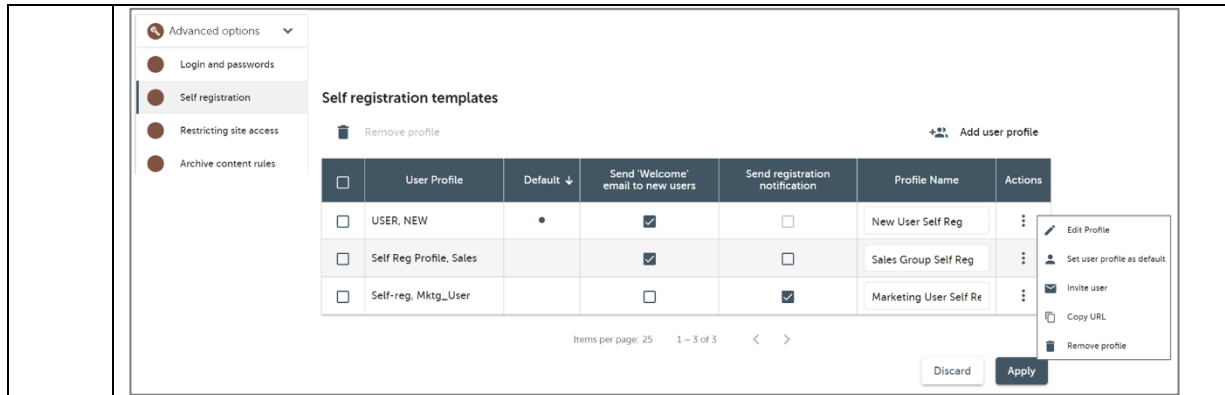
After you have enabled self-registration and set-up the desired profile templates, you can deploy it in a few ways. You can use the combination of these methods that best meets your needs:

- 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 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.

Step	Action
1	From Administration , select the “Advanced Options” card.
2	Click the “Self-registration” link.
3	In the Show self-registration link on login page section, slide the toggle to “On” (toggle will be green).
	
4	In the Self registration templates section, verify/select the default profile to be used on your site’s login screen. Note: If the profile you want to use is not the default, click the vertical ellipses in the actions column for that profile and select “Set user profile as default” .



Publish Self Registration Link on a Web Page

Publishing a link or links to self-registration on a web page gives you the flexibility to provide 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.

Step	Action
1	From Administration , select the “Advanced Options” card.
2	Click the “Self-registration” link.
3	In the Self registration templates , section, click the vertical ellipses in the Actions column associated with the profile then select “Copy URL” from the menu. <div data-bbox="407 1194 675 1482" style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <ul style="list-style-type: none"> Edit Profile Set user profile as default Invite user <li style="border: 2px solid red; padding: 2px;"> Copy URL Remove profile </div>
4	Paste the URL in the code for your webpage.

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How to Deploy Self Registration, Continued

Email Link though 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.

Step	Action
1	From Administration , select the “ Advanced Options ” card.
2	Click the “ Self-registration ” link.
3	<p>In the Self registration templates, section, click the vertical ellipses in the Actions column associated with the profile then select “Invite User” from the menu.</p> <div data-bbox="332 787 600 1071" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <ul style="list-style-type: none"> Edit Profile Set user profile as default <li style="border: 2px solid red;"> Invite user Copy URL Remove profile </div> <p>NOTE: If you are composing your own email invitation and want to include the self-registration link, select “Copy URL”, and paste it into your message.</p>
4	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.
5	<p>Edit the email as needed, address, and send.</p> <p>NOTE: You can make edits to this email as necessary but take care not to modify the hyperlinks contained in the message.</p>



QUESTIONS AND ASSISTANCE

**Questions
and
Assistance**

If you have questions or need assistance with Self registration, please contact Brainshark Support.

Our support team is available to assist you Monday – Friday, 8:00 AM to 9:00 PM Eastern.

Phone: 781.370.8222

Email: support@brainshark.com
