BRAINSHARK

July 31, 2018

Product Release Notes

NEW

Brainshark Integrations

Salesforce User Sync

In this release, Salesforce administrators can manage all users in Salesforce alone, including user creation and user updates, via a nightly sync. This will allow admins to save time and effort in managing users in Brainshark and Salesforce.

To enable the sync, the Salesforce admin must:

1. Create a user report in Salesforce.
2. Provide Brainshark with a Salesforce user account that is used to execute the user report. Read and Execute access to the report is required.
3. Provide Brainshark with desired user field mappings – which column in the report should be mapped to which Brainshark user profile field.
    a. The following field mappings are required: Salesforce User ID, Username, First Name, Last Name and E-mail.
    b. In addition, all Brainshark user profile fields (e.g., title, department, city, country etc.,) may be mapped
    c. To map a salesforce user's manager in Brainshark, please include manager's username.
    d. The Salesforce admin can sync any standard or custom field with Brainshark.
    e. Brainshark Active field must be synced with a Salesforce Boolean field only.
    f. Salesforce column names do not need to match the names of Brainshark fields.
    g. If the salesforce profile name is included in the field mappings, it is matched with a Brainshark self-registration template name and syncs a Brainshark user's group assignments to those assigned to the self-registration template user.

Known Limitations:

- If multiple Brainshark accounts share the same username, the user match may not be accurate.

Brainshark CRM Connector for Salesforce V5.3

This release includes two new features:

- Team Readiness Dashboard – the Brainshark Team Readiness dashboard may now be viewed from within Salesforce. Details of the Team Readiness Dashboard may be viewed in the June 2nd and July 21st release notes.
    - After installing the updated package, a Salesforce administrator may create a new 'Team Dashboard' tab.
- Sync Coaching data – in addition to Coaching course data, standalone Coaching activity data (Coaching activities that are not a course) may now be synced in Salesforce allowing customers to create a Salesforce dashboard.
    - The data is based on the Brainshark 'Coaching Participant Summary' report

- After installing the updated package, contact Brainshark Support to enable the Coaching sync.
- Refer to the table below for the 4 coaching objects and available fields

Entity	Coaching Challenge	Coaching Invitations	Coaching Submissions	Coaching Reviews
Fields	ChallengeId	InvitationId	InvitationId	InvitationId
	AuthorId	ChallengeId	ChallengeId	ChallengeId
	Name	ParticipantId	Version	Version
	CreatedDate	InvitationDate	SubmissionDate	ReviewerId
	IsDeleted	LatestSubmissionVersion	AverageScore	OverallScore
		IsDeleted	NumbersOfPeersFeedbackDone	ReviewDate
			MachineScore	

Sync rules:

- Only activities with at least 1 Salesforce participant are synced
  - 'Draft' activities are not synced
  - Activities with no Salesforce participants are not synced
- If the activity creator is not a Salesforce user, the 'AuthorId' field will be null
- If the activity reviewer is not a Salesforce user, the 'ReviewerId' field will be null