

**Batch User Upload Utility**

**User Guide
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# Batch User Upload Utility

The Batch User Upload Utility is available for use by Brainshark Administrators to create and edit multiple Brainshark user accounts at once instead of individually creating or editing users using the Brainshark Administration user interface. Brainshark Administrators with a large number of Brainshark users, both authors and viewers, will find this utility efficient in creating and editing Brainshark user profiles. Large number of Brainshark users is more than 10.

## Preparing Your Users

The Batch User Upload Utility reads a Batch User Upload Spreadsheet which you prepare and which contains all user profile data to upload to Brainshark. This profile data is used to either create new users or edit existing users. To create and edit users with correct access rights and privileges, there are several questions to consider beforehand.

1. Will you want individuals placed in groups? Groups are used to logically associate users with one another based on commonalities or similarities.
	1. Use columns named **GroupName1** through **GroupName20** to specify which groups this user should belong.
	2. Groups must exist in Brainshark before using the Batch User Upload Utility otherwise an error will be raised.
	3. To add existing users to new groups, use the **/-rg** command line argument which means do not replace existing group memberships with those specified in the spreadsheet. Instead, add existing users to the groups specified in the spreadsheet.
	4. To replace the set of groups this user belongs, use the **/rg** command line argument.
	5. If you do not specify either **/-rg** or **/rg** command line argument, the Batch User Upload Utility will behave as though **/rg** was specified on the command line. **/rg** means existing users will be removed from existing groups and added to the groups specified in the spreadsheet.
2. For customers using Learning, will groups have dynamic enrollment into courses or curriculums?
	1. If so, all users added to these groups will automatically be enrolled when uploaded.
	2. Invitation emails will be sent if and only if the course or curriculum is configured in Brainshark to send invitation emails.
3. Should each user have a personal authoring folder?
	1. Use the column named **CreatePersonalFolder** to specify whether or not to create a personal authoring folder.
	2. Users with a personal authoring folder will immediately have authoring rights to their personal authoring folder once uploaded.
	3. The Batch User Upload utility will not remove an authoring folder if one already exists.
4. Which users will be Company Administrators?
	1. Use the column named **IsCompanyAdmin** to specify whether or not to make a user a company administrator.
	2. Company administrators have elevated privileges which help them manage the Brainshark application and its use.
5. Should users be given permission to modify their own profile?
	1. Use the column named **MayEditProfile** to specify whether or not a user can edit their profile.
	2. A user’s profile includes personal information including but not limited to name, address, phone, and communication preferences which allows the user to sign up for newsletters and other notifications from Brainshark.
6. Will new passwords be assigned or randomly generated?
	1. The Batch User Upload Utility can be used to assign a password or randomly generate a new password.
	2. Use the columns named **Password** and/or **SendWelcomeEmail** in the spreadsheet and the ignore password on update command line option named **/ip** or **/-ip**.
	3. The values in these two columns and use of this command line option are interdependent on each other and must be used with careful consideration.
	4. Refer to Appendix B for a complete list of considerations when using the **Password** and **SendWelcomeEmail** columns and the **/ip** or **/-ip** command line option.
7. Should users be required to change their password when logging in to Brainshark for the first time?
	1. Use the column named **MustChangePassword** to specify whether or not to require new users to change their password after first logging into Brainshark.
	2. If the **Action** column is ‘Update’ and the ignore password on update command line option **/ip** is used explicitly or by default, then rows with the update value are ignored.
	3. If the **Action** column is ‘Update’ and the ignore password on update command line option is disabled by specifying **/-ip,** then these existing users will need to change their password when they next login.
8. What features should a user have access to?
	1. Use the column named **MayCreateInteractions** to specify whether or not to allow this user to create question slides.
	2. Use the column named **MayRequestGA** to specify whether or not this user may request a guest author for a Brainshark presentation.
	3. Use the column named **MayMakeGAOwner** to specify whether or not this user may make a guest author the owner of a Brainshark presentation.
	4. Use the column named **MayDeleteGAPres** to specify whether or not this user may delete Brainshark presentations owned by guest authors.
	5. All of the above are used if and only if **CreatePersonalFolder** is used to create a personal authoring folder for this new user or if an existing user is already an author, these fields will be used to edit their authoring privileges.
9. Should users receive Brainshark newsletters and new release notifications?
	1. Use the following columns to specify whether or not users should receive email communications from Brainshark. See Appendix A for a description of these columns.
		1. **ReceiveBrainsharkNewsletter**
		2. **ReceiveAdminBrainsharkNewsletter**
		3. **ReceiveGettingStarted**
		4. **ReceiveViewingActivitySummary**
		5. **ReceiveAdminNews**
10. For customers using Learning, which users will be Learning Course Authors, Learning Managers , Learning Administrators?
	1. Use the following columns to specify which users will have which privileges:
		1. **IsLearningAuthor**
		2. **IsLearningManager**
		3. **IsLearningAdmin**
11. Should new users be automatically notified of their login credentials when the upload is complete?
	1. Use the column named **SendWelcomeEmail** to specify whether or not to send the user a welcome email which includes their randomly generated login credentials.
	2. If SendWelcomEmail is 1, then /ip and /-ip command line options are ignored.
12. Will any custom fields be used to identify users?
	1. The columns named **Custom1** through **Custom10** are available for storing 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 including but not limited to **FirstName**, **LastName**, **Title**, **Phone** and **Email**.
	2. It is not advisable to store personal information in the custom fields such as Social Security Number or other data that is subject to privacy regulations.

Important Note to Remember: For existing users, it is easy to inadvertently delete data in their profile using the Batch Upload utility. If the utility is used to update existing users with a Batch Upload User spreadsheet that does not include all existing profile data, then the user’s profile will be updated using the data, or lack thereof, in the Batch Upload User spreadsheet. See Tips and Tricks to learn how to get a copy of all existing profile data so you can be sure not to inadvertently delete data.

## Tips and Tricks!

1. To automatically create the most current version of the Batch Upload User Spreadsheet for existing users, download it by going to **Reporting->Administration** and select the report named **User Bulk Download**. This produces a Batch Upload User Spreadsheet of all current users including all existing profile data. To create new users, simply add additional rows to this spreadsheet. Note: this spreadsheet will NOT contain password data for existing users. The Password field in the spreadsheet is a required field.
2. Refer to the Brainshark Support [knowledgebase](https://brainshark.zendesk.com/hc/en-us/articles/204900080-How-to-Process-a-Bulk-Upload-Through-the-Batch-Upload-Utility) to get the latest version of the Batch Upload Utility.
3. 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 plus any edits to be made.
4. The password column must be populated with a non-blank value even though the field may be ignored. Refer to **Appendix B** for complete information about when the password field is used and when it is ignored.
5. The password field must be populated with a password that meets your company’s security policy as defined in Administration > Manage Company > Advanced Options > Logins & Passwords.
6. The Batch Upload User spreadsheet must be used exactly as formatted. Do not delete, add or hide any columns.
7. The first column in the Batch Upload User Spreadsheet indicates add or update, however, if it is left blank, it will update existing users and add users who are not located in the Brainshark account.
8. All fields except user names can be updated. If you try to update a user with a new user name, a new, additional user will be created.
9. Note that the Batch Upload Utility cannot be used to delete existing users.
10. Users added to groups with dynamic enrollments will automatically be enrolled in any courses or curriculums for those groups.
11. Do not include any commas in the spreadsheet.

## Completing the Batch Upload User Spreadsheet

The *Batch User Upload* spreadsheet must be populated in its entirety with few exceptions. The following are some important tips for populating the *Batch Upload* *User S*preadsheet:

* Make sure you are using the most current version of the *Batch User Upload* spreadsheet available for download from the Brainshark Customer Support Knowledgebase by clicking [here](https://www.brainshark.com/training/vu?pi=zHdzBKJZrzXRwLz0).
* The file must be saved as a comma delimited or comma separated values (CSV) file.
* The file must contain a complete header row. Please do not modify header names or columns in any way.
* Commas should never be used in user names, titles, email addresses, etc. The comma is used as a field delimiter, so it is important that the data you are populating in the fields themselves do not contain commas.
* Similarly, other characters such as bars and slashes should be avoided so they do not interfere with the processing of the data.
* Do not include any extra columns. The spreadsheet accounts for all available user fields. If more columns are added, it will cause the processing of the Batch User Upload Spreadsheet to fail.
* Note sometimes even though a row may look empty, it could still contain data. Be sure to completely delete the contents of empty rows.
* Do not delete, add or hide any columns. All required fields must be completed.
* Remember to include all data – any fields left blank will have existing data deleted or left blank when the batch upload is run.
* Usernames cannot be changed via the batch upload process. Uploading an update spreadsheet with new user names will create new users with those new usernames.
* Enter Add or Update in the Action column. If Action column is empty, it will create a new user if the user doesn’t already exist or it will update the user if the user already exists.
* The company directory is the last part of the login directory that you use to log into your site – eg:www.brainshark.com/COMPANYNAME. COMPANYNAME is what should be entered without the [www.brainshark.com/](http://www.brainshark.com/).
* The password column must contain a value. Even if you are selecting the option to have the system generate passwords for your users when they are created, it is still necessary to have some value in this field when populating the batch user upload spreadsheet.
* Make sure that your email addresses are all valid and unique, containing the appropriate “@” symbol and domain. Incomplete or inaccurate, duplicate or missing email addresses will cause the upload to fail.

They don’t have to be unique, it certainly makes it easier to identify them.

* When completing the Groups sections, enter the name of the groups the user is to be in in any of the group columns. It is not necessary that the column contain the same group. For example, if user 1 is in the groups Sales, Management and NE Region, then enter Sales under GroupName1, Management under GroupName2 and NE Region under GroupName3. If user 2 is in Marketing, Executive and Central region, then enter Marketing under GroupName1, Executive under GroupName2 and Central region under Groupname3.
* All groups must be entered in Brainshark prior to the upload, and must be entered onto the spreadsheet EXACTLY as they appear in Brainshark. Be careful of leading or trailing spaces.
* If updating user information, first use the User Bulk Download report from My Applications, Administration, Reports, and select Data Download. This will produce a CSV formatted file containing all current user data in the format required by the Batch Upload utility. Edit what you wish then upload again using the Batch Upload utility.

Please see [Appendix A](#_Appendix_A) for a complete field by field description of the spreadsheet values.

## Automating Completion of Batch Upload User Spreadsheet

It is at a customer’s discretion as to how they wish to populate the *User Batch 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. Regardless of what method is used for populating 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 *User Batch 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 each time. The *User Batch Upload* spreadsheet provides an ‘Action’ column that is used to designate which action applies.

# Automating the Upload

Brainshark has created an executable that you may run at your discretion, which will automatically send the *User Batch Upload* spreadsheet to Brainshark for processing.

Upon receiving the BatchUploadUtility.zip file, you should extract its contents to a folder within the C drive of the local machine designated to run the utility.

A config file contained in the BatchUploadUtility.zip file will require your updating once extracted to your local machine. This is explained in greater detail below.

Once you have completed the *User Batch Upload* spreadsheet and modified the config file, you can run the executable which will connect to Brainshark.com and using SSL, transmit the file. That will submit a job for processing and send a notification upon completion.

**It is recommended that customers who will be automating the user batch upload process identify a technical resource at their organization that can assist with this effort.**

## Minimum System Requirements

The customer-side machine which is running the BatchUploadUtility.exe will need to be using a Microsoft Windows operating system with Microsoft .NET Framework Version 4.7.2.

In order to use this feature your company needs to have APIs/ WebServices Basic Access enabled on your company’s site. To confirm it is enabled on your site, contact support@brainshark.com.

## Editing the Config File

Before running the executable, it is necessary for you to review the contents of this config file to ensure the users will be properly loaded to the correct sharkive and notifications will be sent.

To access the config file, browse to where you extracted the contents of BatchUploadUtility.zip and locate the file called “BatchUploadUtility.exe.config”. To edit this file, click on it to highlight, right click and choose Edit. This will bring you into Notepad where you will see something similar to the following. Items marked in **red** must be updated by you and are explained below:

<configuration>

    <configSections>

        <sectionGroup name="applicationSettings" type="System.Configuration.ApplicationSettingsGroup, System, Version=2.0.0.0, Culture=neutral, PublicKeyToken=b77a5c561934e089" >

            <section name="BatchUploadUtility.Properties.Settings" type="System.Configuration.ClientSettingsSection, System, Version=2.0.0.0, Culture=neutral, PublicKeyToken=b77a5c561934e089" requirePermission="false" />

        </sectionGroup>

    </configSections>

    <applicationSettings>

        <BatchUploadUtility.Properties.Settings>

            <setting name="BatchUploadUtility\_ws\_BrainsharkService" serializeAs="String">

                <value>https://www.brainshark.com/brainshark/webservices\_191/brainsharkservice.asmx</value>

            </setting>

        </BatchUploadUtility.Properties.Settings>

    </applicationSettings>

                <appSettings>

                                <add key="ServerLocation" value="https://www.brainshark.com"/>

                                <add key="WebServiceLocation" value="/brainshark/webservices\_191/brainsharkservice.asmx"/>

                                <add key="ScriptLocation" value="/brainshark/BrainsharkAdmin/BatchLoad.asp"/>

                                <add key="CompanyKey" value=" **YOUR\_LOGIN\_DIRECTORY\*-**"/>

                                <add key="Username" value=" **YOUR\_COMPANYADMINISTRATOR\_USERNAME\***"/>

                                <add key="Password" value=" **COMPANY\_ADMIN\_PASSWORD\***"/>

                                <add key="DefaultKeyword" value="&lt;&lt;Default&gt;&gt;"/>

                                <add key="StatusEmail" value=" **YOUR\_EMAIL\_ADDRESS\***"/>

                </appSettings>

</configuration>

**CompanyKey:** This is the company’s logindirectory, so for example if your sharkive URL is https://www.brainshark.com/companyabc , then your Company Key would be **companyabc**.

**Username:** The username of an active Brainshark Company Administrator in the sharkive.

**Password:** The corresponding password for that Company Administrator.

Note: if the Brainshark Company Administrator changes their password, then this config file will need to be updated accordingly.

**StatusEmail:** The email address where to send the email notification of the success or failure of users processed. Note**:** you can have multiple email addresses separated by a comma, if desired.

Once you have updated the config file and have completed the User Batch Upload spreadsheet, you are ready to run the executable.

## Running the Program

This program is a Console Application so it must be run using the command prompt. The following steps will walk you through this process. Please note: If you are running a client firewall on your machine, be sure that if prompted you allow this program to access the internet.

1. Click the Windows Start button. Select Run, then type “cmd”, and press Enter. You will see a screen similar to this one:



1. At the prompt, type “cd” followed by the full location of the BatchUploadUtility.exe file, and press Enter. Your command prompt should now reflect the path to the BatchUploadUtility.exe file you extracted. You will see a screen similar to this one:



1. To see a help menu with available command line prompts, type “BatchUploadUtility.exe /?” and press Enter. You will see a screen *similar* to the one below:



This shows you two or more additional configuration options that you may want to exercise. See the section below called [Additional Settings](#_Additional_Settings) to learn more about these options.

1. To run the executable from the command line prompt, type “BatchUploadUtility.exe” followed by the exact path to the location of the *User Batch Upload* spreadsheet and type Enter. You will see a screen *similar* to the one below:



This tells you that the file was successfully uploaded to Brainshark.com and is now waiting to be processed. Processing times will vary based on the number of requests in the queue, as well as the size of the file that is processing. Once the processing is complete, you will receive an email to the address specified in the config file, which will be your confirmation that the process completed successfully.



If the file contained errors, the email would show where those errors occurred. You would need to correct all errors in the spreadsheet and try again.

## Command Line Options

## The Batch Upload utility requires one argument and two optional command line parameters as follows:

 **BatchUploadUtility.exe filepath [/-ip] [/-rg]**

 **BatchUploadUtility.exe filepath [/-ip] [/rg]**

 **BatchUploadUtility.exe filepath [/ip] [/-rg]**

**filepath** is the required argument and must be the pathname or filename of the Batch User Upload spreadsheet. File can be the filename of the Batch User Upload spreadsheet if it is in the same directory as the Batch Upload executable file. File must be the full pathname to the Batch User Upload spreadsheet if it is in a different location than the Batch Upload executable file. The optional values to enter are one of the following/-rg or /rg

/-ip or /ip

 Or any combination thereof such as but not limited to /-rg /ip.

**/ip** ignores password on update. This is on by default and is not necessary to enter on the command line. It means existing users whose profiles are being updated will maintain their existing passwords. This command line option is ignored depending on selections made in the Batch User Upload spreadsheet. Please refer to Appendix B for complete details on the results of using this command line option in conjunction with data supplied in the spreadsheet.

**/rg** replaces existing groups. This is on by default and is not necessary to enter on the command line. This means existing users (Action = update) who are already members of groups will be removed from their existing groups and added to groups specified in GroupName1 through GroupName20 fields in the Batch User Upload spreadsheet If no group names are specified in those fields, then existing users will not be members in any groups and will be removed from all existing groups, other than the system default group All Company Users.

**/?** if used by itself (ie BatchUploadUtility.exe /?) will display batch upload utility help.

**IMPORTANT:** If no command line parameters are provided on the command line, then the batch upload utility will behave by default as though /ip and /rg command line options have been provided. This means the batch upload utility will ignore passwords on update and will replace existing groups. To alter this default behavior, one can specify command line options as follows:

 **/-ip** will not ignore password on update – meaning the password provided in the password column will become the existing user’s new password. Depending on selections made in the Batch User Upload spreadsheet, this command line option may be ignored. Please refer to Appendix B for complete details on the results of using this command line option in conjunction with data supplied in the spreadsheet.

**/-rg** will not replace existing groups – meaning an existing users’ current group memberships will remain intact and if new groups are specified in GroupName1 through GroupName20, then the existing user will be added to those groups as well.

## Notifications

When the upload process is complete, the email address identified in the Batch Upload Utility Configuration File will be notified of its success, as well as any failures that may have occurred. See the section titled “**Editing the Config File**” for more detailed information.

# Questions?

# If you have additional questions about *User Batch Upload,* please contact the Brainshark Support team at support@brainshark.com

# Appendix A

**User batch upload:**

|  |  |  |
| --- | --- | --- |
| Column Header | Column Value | Required |
| Action | **Add**=create the user. Give an error if it exists**Update**=update the user. Give an error if it doesn't exist**<null>** =Add if it doesn't exist, update if it does**AddOrUpdateNonEmpty**=Add or update an existing user with ONLY the data provided. Empty CSV data fields are not updated in the user account.  |  |
| CompanyDirectory | The login directory for the company. All values in this column must be the same. Any rows with a different value than the value in the first row will get an error and the entire file will fail. (i.e., if your Sharkive url is [www.brainshark.com/documentation](http://www.brainshark.com/documentation) then enter “documentation” in this column). | Yes |
| UserName | The username to create/update within the company specified above.  | Yes |
| Password | This field contains the password for the username being created. **NOTE:** This field will be ignored if **SendWelcomeEmail** field is set to 1. A new computer generated password will be sent to the user in a welcome email.This field must be nonblank but will be ignored if the **Action value** is **Update** and if the Ignore password on update command line option is used (**/ip**). The password entered must meet the password policy of the company when the Action value is Update and if Ignore password on update option is disabled (**/-ip**).  | Yes |
| LastName | Last name of the user.  | Yes |
| FirstName | First name of the user.  | Yes |
| Title | Title of the user. |  |
| Department | Department of the user. |  |
| Phone | Phone number of the user. |  |
| Email | Email address of the user.  | Yes |
| CompanyName | Company name to which the user belongs to. |  |
| CreatePersonalFolder | Specify whether or not to create a personal folder for the new user.**1 = yes;** **0 = no;** **- = no change (0 by default)****NOTE:** Users for whom a personal authoring folder is created will immediately have authoring rights to this folder. |  |
| IsCompanyAdmin | 1 / 0 option as to whether or not the user is created as a company admin. **1 = yes;0 = no** | Yes |
| MayEditProfile | 1 / 0 option as to whether or not the user has the ability to edit their profile. **1 = yes;** **0 = no** | Yes |
| IsActive | 1 / 0 option as to whether or not the user is created as **Active** (1) or **Inactive** (0). **1 = yes;** **0 = no** | Yes |
| Address1 | Address 1 of the user. |  |
| Address2 | Address 2 of the user |  |
| City | The city of the user. |  |
| State | The state of the user. |  |
| Country | The country of the user. |  |
| PostalCode | Postal code of the user.  |  |
| Custom1 | A field to store custom data for the user |  |
| Custom2 | A field to store custom data for the user |  |
| Custom3 | A field to store custom data for the user |  |
| Custom4 | A field to store custom data for the user |  |
| UCI | The Unique Company Identifier (UCI) used by the company to uniquely identify the user. |  |
| MayCreateInteractions | 1 / 0 option as to whether or not the user is able to create Interactions. **1 = yes;** **0 = no** | Yes |
| IsLearningAuthor | 1 / 0 option as to whether or not the user is a Learning Course Author. **1 = yes;** **0 = no** | Yes |
| IsLearningManager | 1 / 0 option as to whether or not the user is a Learning Manager. **1 = yes;** **0 = no** | Yes |
| IsLearningAdmin | 1 / 0 option as to whether or not the user is a Learning Administrator. **1 = yes;** **0 = no** | Yes |
| MustChangePassword | 1 / 0 option as to whether a user needs to change their password.. **1 = yes;** **0 = no**If the **Action** value is Add, it sets must change password on first login.**/ip** - On update, it is ignored.**/-ip** On Update, it sets must change password on next login | Yes |
| DefaultApplication | . Set the default application the users see when they login.* UseCompanyDefault - set to use company default
* Presentations – default app is presentations
* Administration – default app is administration
* Campaigns – default app is campaigns
* Learning – default app is learning
* Defaulted – for add, use company default. For update, leave unchanged.

Any other value will get an error.**Note**: If user does not have access to the specified app, the user will get the company default app. If using the default application for the Sharkive, enter **“<<default>>”** for each row in this column. | Yes |
| DefaultHomePage | Set the default home page users see when they login.Enter **<<default>>** for each row in this column.Can also use UseCompanyDefault. | Yes |
| MayRequestGA. | 1 / 0 option as to whether or not the user is may request a guest author for a presentation. **1 = yes;** **0 = no** | Yes |
| MayMakeGAOwner | 1 / 0 option as to whether or not the user may make a guest author the owner of a presentation. **1 = yes;** **0 = no** | Yes |
| MayDeleteGAPres | 1 / 0 option as to whether or not the user may delete presentations owned by a guest author. **1 = yes;** **0 = no** | Yes |
| Bio | Text field specifying a short biography of the user. If it contains commas or quotes, it must be in quotation marks and use standard quoting rules, It may not have line breaks.  |  |
| IMDisplayText | Values to specify IM for user. Meaning varies with company IM settings.  |  |
| IMLinkID | Values to specify IM for user. Meaning varies with company IM settings. |  |
| IMLInkType | Values to specify IM for user. Meaning varies with company IM settings. |  |
| GroupName1..n | Up to 20 groups that user should be made a member of. The name must match the name of an existing group in the sharkive. **/rg –** If the **Action** value is Update, the user will be removed from any groups not specified they are currently members of and only added to the groups specified in the current file. **/-rg** – If the **Action** value is Update, all existing groups a user belongs to will be maintained, any new groups in this file will add this user as a new member.  |  |
| SecondaryEmail | Secondary email for the user. Used for our campaigns application only.  |  |
| ReceiveBrainsharkNewsletter | 1 / 0 option as to whether to send the user the Brainshark Newsletter **1 = yes;** **0 = no** | Yes |
| ReceiveAdminBrainsharkNewsletter | . 1 / 0 option as to whether to send the user the Brainshark Monthly Utilization Report **1 = yes;** **0 = no** | Yes |
| SendWelcomeEmail | 1 / 0 option as to whether to send the user an email with a new generated password or use the default one. When set to 1 and **Action** value is Update, only worksif the ***Ignore Password on update*** check box is turned **OFF**. (ie, using the **/-ip parameter)** **1 = yes;** **0 = no** | Yes |
| DisabledCreatePresentationFromWizard | This field is required to be set to 1 = disabled  | Yes |
| SSOKey | Single Sign-On Identifier -- unique identifier for use with SSO --leave blank if not using SSO with Brainshark |  |
| ReceiveGettingStarted | 1 / 0 option as to whether to send the user the Getting Started communications **1 = yes;** **0 = no** | Yes |
| ReceiveViewingActivitySummary | 1 / 0 option as to whether to send the user Viewing Activity Summary emails **1 = yes;** **0 = no** | Yes |
| ReceiveAdminNews | 1 / 0 option as to whether to send the user the Administrator News **1 = yes;** **0 = no** | Yes |
| Custom5 | A field to store custom data for the user |  |
| Custom6 | A field to store custom data for the user |  |
| Custom7 | A field to store custom data for the user |  |
| Custom8 | A field to store custom data for the user |  |
| Custom9 | A field to store custom data for the user |  |
| Custom10 | A field to store custom data for the user |  |
| ReceiveViewReceipts | 1 / 0 option as to whether to send the author or referring user a View Receipt after every view. **1 = yes;**  **0 = no** |  |
| ManagerUsername | The username of the user's manager, if one is assigned. |  |
| UploadPresentations | 1 / 0 option as to whether or not the user can created presentations from upload. **1 = yes;**  **0 = no** |  |
| CreateAnimatedContent | Option deprecated and always set to 1 so all users can create animated content. |  |
| CreateChallenges | 1 / 0 option as to whether to or not the user can create Coaching challenges. **1 = yes;**  **0 = no** |  |
| HeadCoach | 1 / 0 option as to whether or not the user is a Head Coach. **1 = yes;**  **0 = no** |  |
| ReportingEnabled | 1 / 0 option as to whether or not the user has Reporting Enabled. **1 = yes;**  **0 = no** |  |
| CoachUsername | The username of the user’s coach, if one is assigned. |  |

**Group Batch Upload:**

For a group import, the file must have this format:

|  |  |  |
| --- | --- | --- |
| **Column Header** | **Column Value** | Required |
| **Action** | Add=create the group. Give an error if it existsUpdate=update the description. Give an error if it doesn’t existDelete=delete the group. Give an error if it doesn’t exist.Empty=Add if it doesn’t exist, update if it does | Yes |
| **CompanyDirectory** | The login directory for the company the group is in. All values must be the same. Any rows with a different value than the value in the first row will get an error and not be added. | Yes |
| GroupName | The name of the group to be added The combination of CompanyDirectory and GroupName are used to determine if the group exists.Note GroupName cannot be changed. Matching for GroupName is case insensitive.GroupName must be the name of a user group. It cannot be “All Company Users” or “Administrators”.Group name cannot be the defaulted. | Yes |
| Description | Description of the group  |  |
| ReplaceExistingManagers | Use "Y" to replace managers, "N" to merge with the existing group managers. |  |
| GroupManagerUsername1 | The Group Manager's Brainshark username.\* |  |
| GroupManagerUsername2 | The Group Manager's Brainshark username.\* |  |
| GroupManagerUsername3 | The Group Manager's Brainshark username.\* |  |
| GroupManagerUsername4 | The Group Manager's Brainshark username.\* |  |

For both formats, the first row must contain the column headers.

\* If a group requires more than 4 managers, you can enter them on multiple rows. Make sure to set "ReplaceExistingManagers" to "N" for all rows after the first (to prevent the later rows from overwriting the earlier ones). The Description will also be overwritten for each row that a group appears on; use the default keyword (set above) to prevent the overwrite.

# Appendix B

Please note that in all cases the Password column in the Batch Upload User Spreadsheet ***must be set to a nonblank value, the value*** ***must adhere to the password preferences set in Brainshark Administration -> Advanced Options -> Logins and Passwords***. Refer to the table below to learn when the Password field is ignored and when it is used. It depends on the combination of fields and command line options as shown in the table below.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Action** | **Must Change Password field value** | **Send Welcome Email field value** | **Ignore password on update command line option** | **Password field value meaning**  | **Result** | **When to use** |
| add | 1 | 1 | /ip and /-ip are ignored because action is add. | Ignored when Send Welcome Email field value is 1. | New users are created and receive a welcome email containing their username and randomly generated password. Upon first login, new users will be prompted to change their password. | When randomly generated initial passwords automatically mailed to new users is preferred.  |
| add | 1 | 0 | /ip and /-ip are ignored because action is add. | Becomes the new users' password. | New Users are created using the username and password specified in the spreadsheet. New users must be notified of their username and password after the batch upload is successfully completed. Upon first login, new users will be prompted to change their password. | When assigning initial passwords then manually notifying new users of their login credentials is preferred. |
| add | 0 | 1 | /ip and /-ip are ignored because action is add. | Ignored because Send Welcome Email field value is 1. | New users are created and receive a welcome email containing their username and randomly generated password. Upon first login, new users will not be prompted to change their password. | When randomly generated passwords automatically mailed to new users is preferred.  |
| add | 0 | 0 | /ip and /-ip are ignored because action is add. | Becomes the new users' password. | New Users are created using the username and password specified in the spreadsheet. New users must be notified of their username and password after the batch upload is successfully completed. Upon first login, new users will not be prompted to change their password. | When assigning passwords then manually notifying new users of their login credentials is preferred.  |
| update | 1 | 1 | /ip or /-ip | Ignored because SendWelcomeEmail field value is 1. | Existing users will automatically receive an email containing a randomly generated password. The user will be required to change password on their next login. | When changing existing user passwords to randomly generated passwords and requiring them to change on next login is preferred. |
| update | 1 | 0 | /ip | Ignored when Ignore Password on Update (/ip) command line option is used. | Existing users’ passwords are retained but all users will be prompted to change their password on their next login. | When retaining existing user passwords but requiring them to change their password on next login is preferred. |
| update | 1 | 0 | /-ip | Becomes the users' new password when **do not** Ignore Password on Update (/-ip) command line option is used. | Existing users’ passwords will be changed to the value in the Password field. Existing users must be notified of their new username and password after the batch upload is successfully completed. Upon the existing user’s next login, they will be required to change their password. | When resetting existing user passwords to the value in the password field and requiring them to change their password on next login is preferred. |
| update | 0 | 1 | /ip or /-ip | Ignored when Send Welcome Email field value is 1. | Existing users will automatically receive an email containing a randomly generated password. The user will not be required to change password on their next login. | When resetting existing user passwords to randomly generated passwords is preferred. |
| update | 0 | 0 | /ip | Ignored when Ignore Password on Update (/ip) command line option is used. | Existing users’ passwords are retained and the user will not be required to change the password upon next login.  | When updating existing user profile data except password is preferred. |
| update | 0 | 0 | /-ip | Becomes the users' new password when **do not** Ignore Password on Update (/-ip) command line option is used. | Existing users will have their password set to the value in the password field. They will not have to change this password on next login. They will need to be manually notified of this change.  | When resetting existing user passwords to the value in the password field is preferred. |