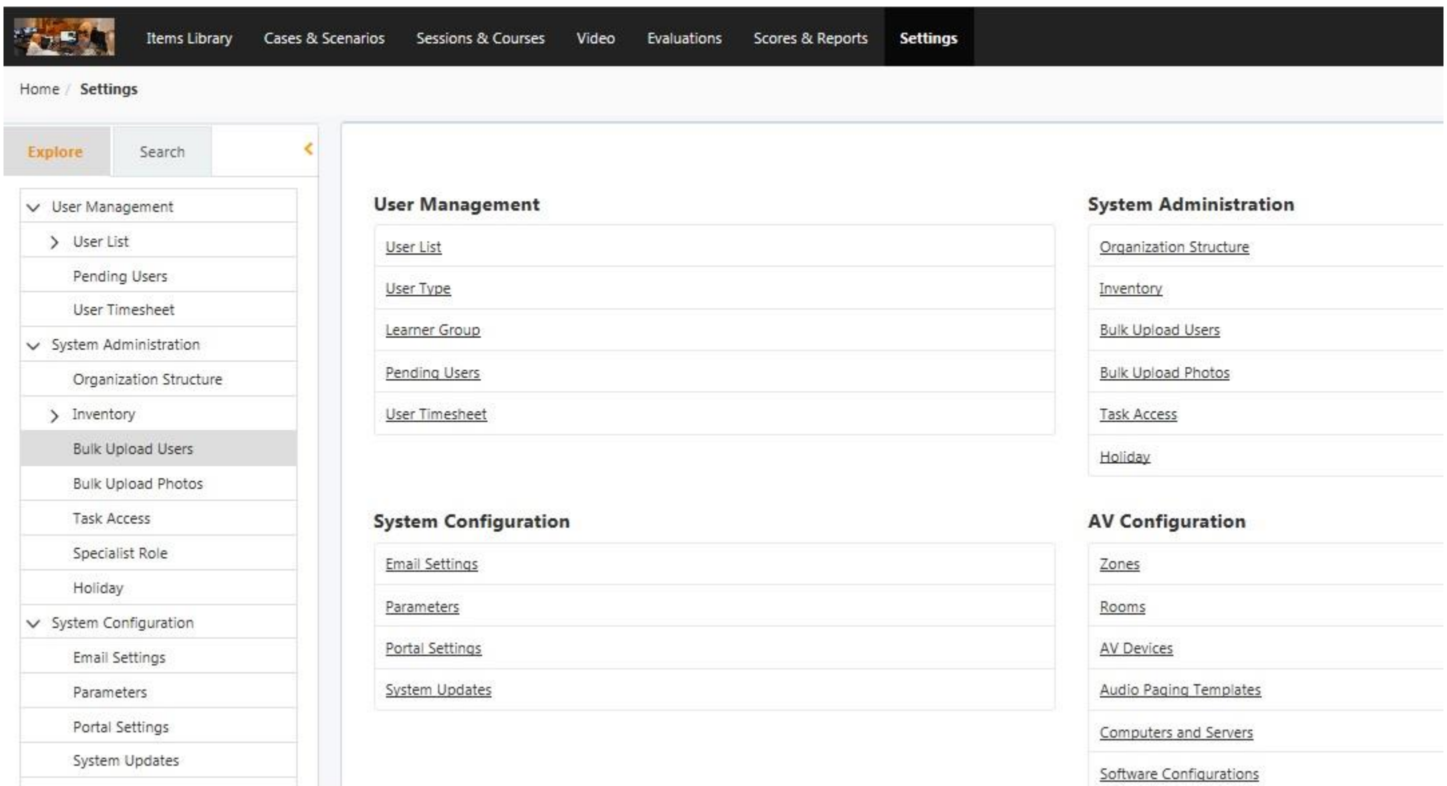
Bulk Upload Users and Photos

The SIMULATIONiQ™ Enterprise application enables a SIMULATIONiQ Enterprise Administrator to:

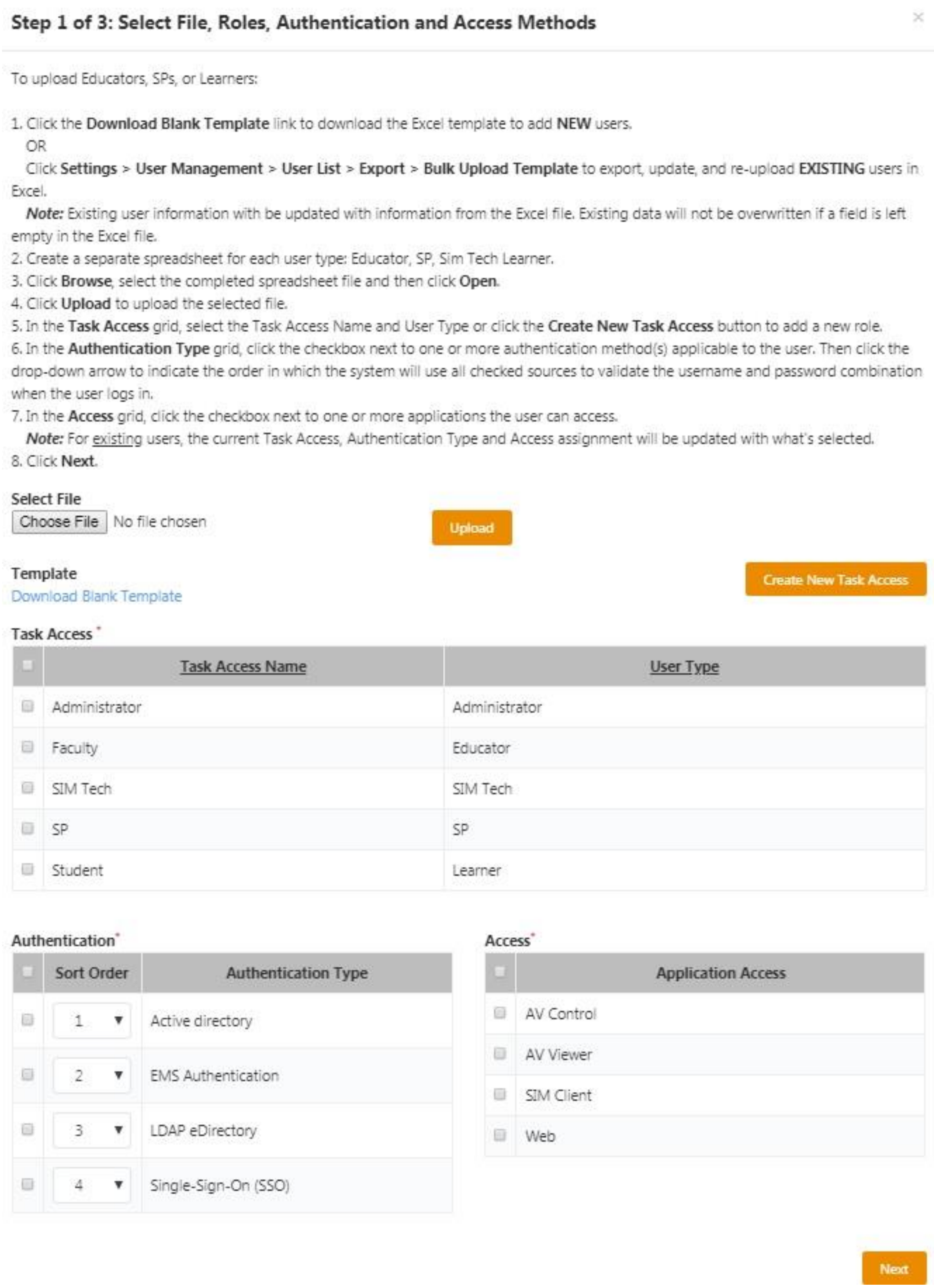
- Create **new** user accounts for Educators, SPs, Sim Techs and Learners through a bulk upload process.
- **Export existing user profile information** (except passwords) to an Excel spreadsheet.
- **Bulk update existing users** using the bulk upload template. **Available in Quartz Release**
- **Bulk upload user profile photos**.

Create new user accounts



Click **Settings** and then click **Bulk Upload Users.** The **Step 1 of 3: Select File, Role, Authentication and Access Methods screen** appears.

Step 1 of 3: Select File, Role, Authentication and Access Methods



Step 1 of 3: Select File, Roles, Authentication and Access Methods

To upload Educators, SPs, or Learners:

1. Click the **Download Blank Template** link to download the Excel template to add **NEW** users.
   OR
   Click **Settings** > **User Management** > **User List** > **Export** > **Bulk Upload Template** to export, update, and re-upload **EXISTING** users in Excel.
   Note: Existing user information with be updated with information from the Excel file. Existing data will not be overwritten if a field is left empty in the Excel file.
2. Create a separate spreadsheet for each user type: Educator, SP, Sim Tech Learner.
3. Click **Browse**, select the completed spreadsheet file and then click **Open**.
4. Click **Upload** to upload the selected file.
5. In the **Task Access** grid, select the Task Access Name and User Type or click the **Create New Task Access** button to add a new role.
6. In the **Authentication Type** grid, click the checkbox next to one or more authentication method(s) applicable to the user. Then click the drop-down arrow to indicate the order in which the system will use all checked sources to validate the username and password combination when the user logs in.
7. In the **Access** grid, click the checkbox next to one or more applications the user can access.
   Note: For existing users, the current Task Access, Authentication Type and Access assignment will be updated with what's selected.
8. Click **Next**.

Select File

Choose File No file chosen

Upload

Template

Download Blank Template

Create New Task Access

Task Access *

	Task Access Name	User Type
	Administrator	Administrator
	Faculty	Educator
	SIM Tech	SIM Tech
	SP	SP
	Student	Learner

Authentication *

	Sort Order	Authentication Type
	1 ▼	Active directory
	2 ▼	EMS Authentication
	3 ▼	LDAP eDirectory
	4 ▼	Single-Sign-On (SSO)

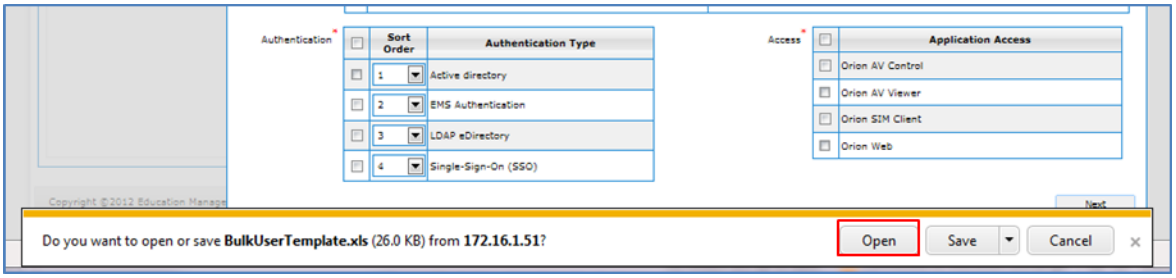
Access *

	Application Access
	AV Control
	AV Viewer
	SIM Client
	Web

Next

1. Click the **Download Blank Template** link to download the Excel template.

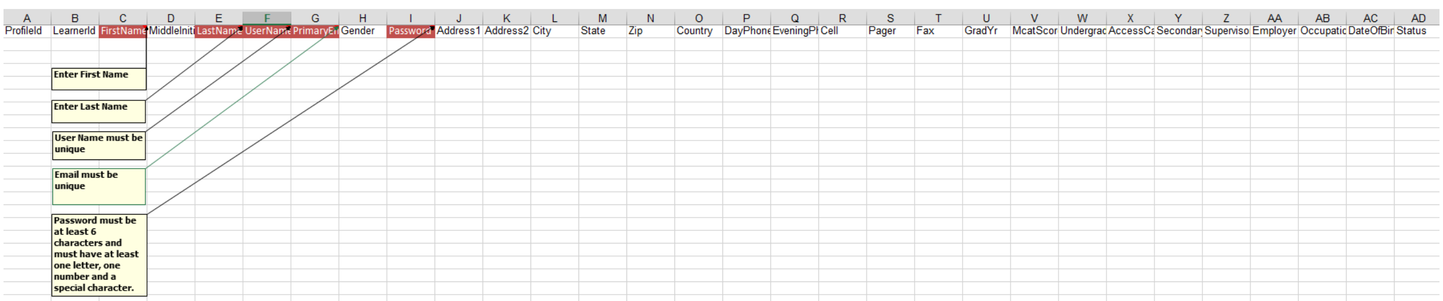
Note: You must create a ***separate*** spreadsheet for each user type: **Educator, SP, Learner, Sim Tech**.



2. Click **Open.**

3. An Excel template appears.
   (***Note***: If Excel is not installed on your computer, save the template, and then open it on a computer that has Excel installed. Input your information there, save the completed template, and bring it back to this computer to upload).

4. Click **Enable Editing** on the yellow bar at the top of the spreadsheet.



- **Required Information**
  For **all types of users**, include this **required** information:
  - First Name
  - Last Name
  - User Name (must be unique)
  - Primary Email (must be unique)
  - Password

- **Password Requirements**

  IMPORTANT! Password must be at least 6 characters and must have at least one letter, one number and a special character.

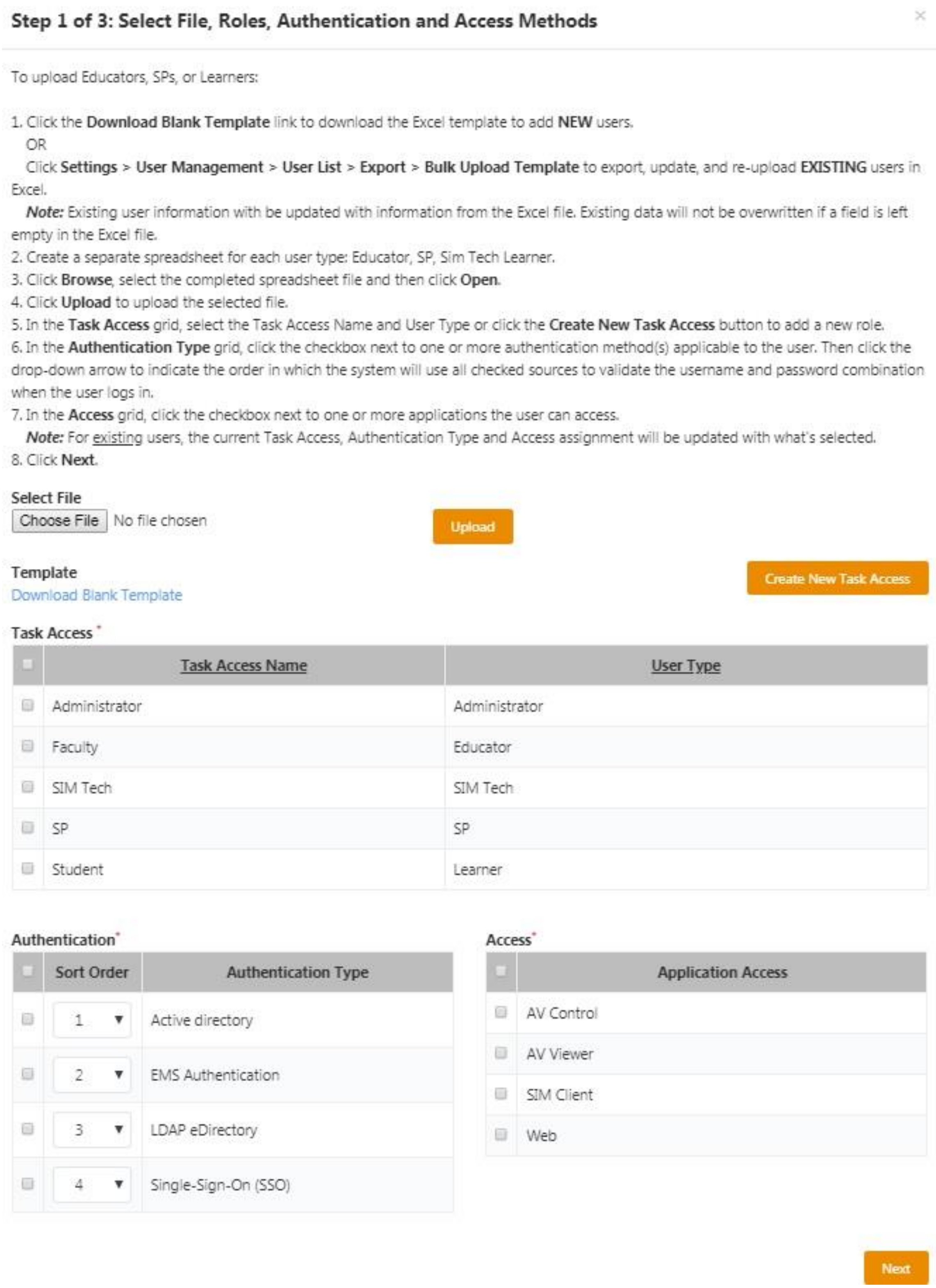
  Regardless of the **Authentication Type**, a password needs to be indicated, following the Password requirements.

- **For Active Directory or LDAP Authentication**
  (Note: If you are using **Active Directory or LDAP authentication** (that is, the SIMULATIONiQ Enterprise system is authenticating against your institution-wide system), each user's username *must be the same as it is in the institution-wide system* and the password field can be **any** password (adhering to the Password requirements.) in order to upload the template. When the user logs into the SIMULATIONiQ Enterprise system, it will bypass the password field in the SIMULATIONiQ Enterprise database and authenticate using your Active Directory user information.)

5. Complete the template and review to make sure all the required fields are complete.

6. Save each spreadsheet as .xls or .xlsx.

Upload the completed spreadsheet



1. On the SIMULATIONiQ Enterprise Bulk Upload screen, click **Browse or Choose File**, select the completed spreadsheet file and then click **Open**. The file name appears in the **Select File** field.

2. Click **Upload** to upload the selected file.

3. In the **Task Access** grid, select the Task Access Name and User Type (or click the **Create New Task Access** button to create a new role.)

4. In the **Authentication Type** grid, click the checkbox next to one or more authentication method(s) applicable to the user.

   - **EMS or SIMULATIONiQ Enterprise Authentication** – users will use the username and password indicated in the bulk upload sheet to log into SIMULATIONiQ Enterprise.
   - **Active Directory, LDAP, Single Sign-on** – users will use the username and password they use to log into their center's computers. This is coordinated with your IT department.

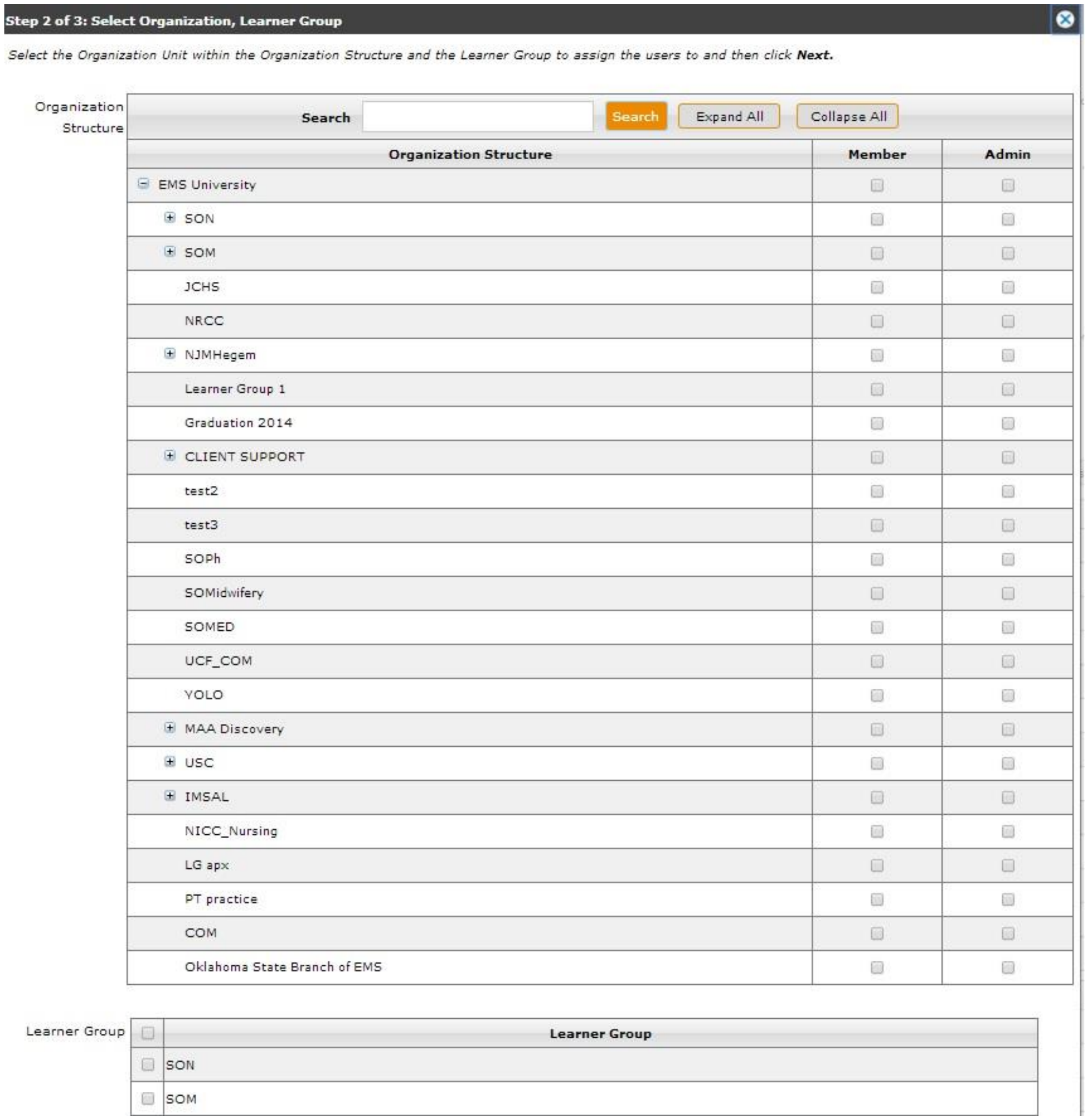
5. Then click the drop-down arrow to indicate the order in which the system will use all checked sources to validate the username and password combination when the user logs in.

6. In the **Access** grid, the default Application Access will be selected automatically.

   To select other Application Access other than the default settings, click the checkbox next to one or more applications the user can access.

7. Click **Next.**

Step 2 of 3: Select Organization Unit and Learner Group (optional)



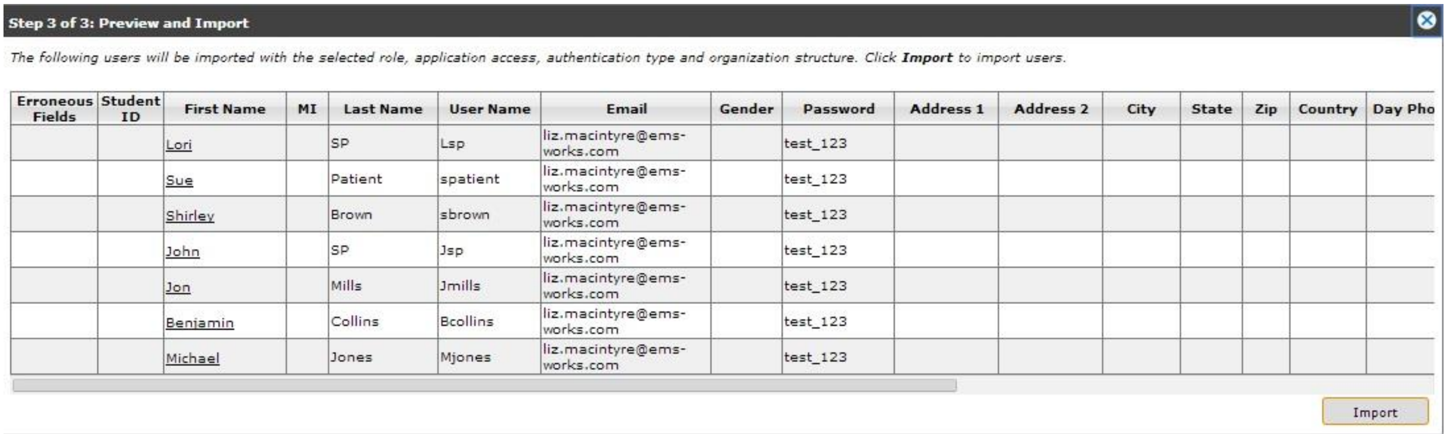
1. In the **Organization Structure** grid, select the level within the hierarchy to associate this group of users.

2. Select whether this group of users are **Members** and/or **Administrators**.

    a. ***Note***: **Learner Groups** are for Learner members. Learner Groups will allow you to filter your searches by Learner Groups, give access to video per Learner Group, allow learners to self-register for session (if you choose that type of session).

3. Click **Next**.

Step 3 of 3: Preview and Import



Step 3 of 3: Preview and Import

*The following users will be imported with the selected role, application access, authentication type and organization structure. Click **Import** to import users.*

Erroneous Fields	Student ID	First Name	MI	Last Name	User Name	Email	Gender	Password	Address 1	Address 2	City	State	Zip	Country	Day Pho
		Lori		SP	Lsp	liz.macintyre@ems-works.com		test_123							
		Sue		Patient	spatient	liz.macintyre@ems-works.com		test_123							
		Shirley		Brown	sbrown	liz.macintyre@ems-works.com		test_123							
		John		SP	Jsp	liz.macintyre@ems-works.com		test_123							
		Jon		Mills	Jmills	liz.macintyre@ems-works.com		test_123							
		Benjamin		Collins	Bcollins	liz.macintyre@ems-works.com		test_123							
		Michael		Jones	Mjones	liz.macintyre@ems-works.com		test_123							

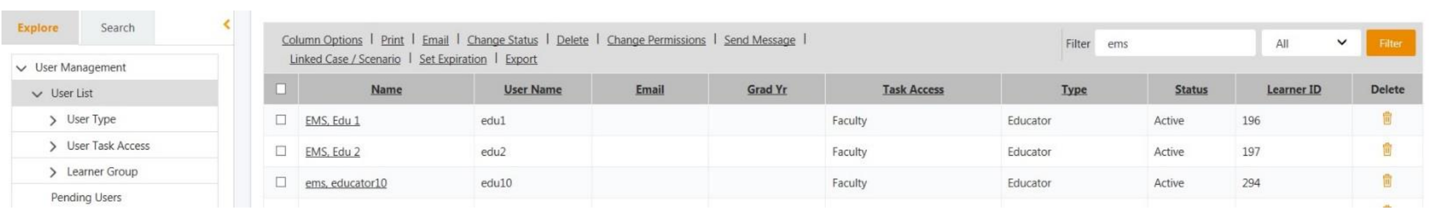
Import

1. Review the data displayed in the preview window and then click **Import.**
   ***Note*:** If information appears in the "Erroneous Fields" column, correct the data in the Excel spreadsheet and upload the corrected file.

Export existing user profile information to an Excel spreadsheet

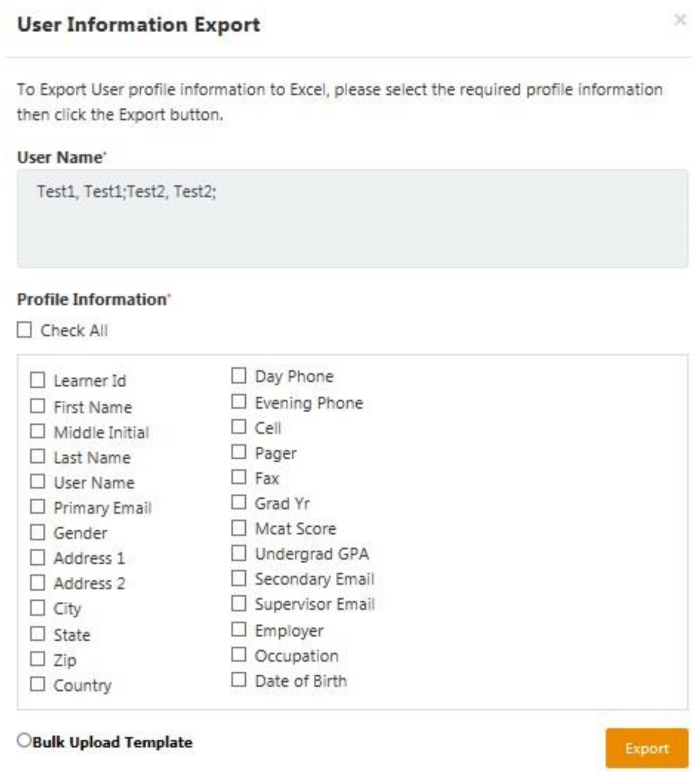
Export existing user information (except passwords) to an Excel spreadsheet from the following locations:

- Settings > User Management > User List
- Settings > User Management > User List > User Type
- Settings > User Management > User List > User Task Access
- Settings > User Management > User List > Learner Group
- Settings > User Management > Pending Users
- Settings > Search > Users



To export existing user profiles to Excel:

1. Click the checkboxes next to the users you want to export.
2. Click the **Export** link.

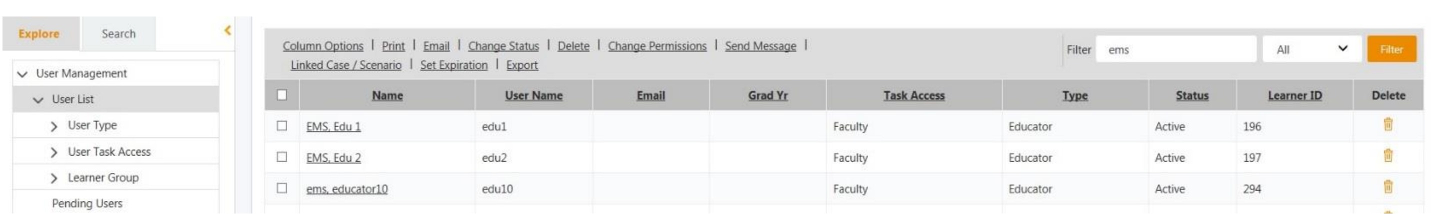


3. Select specific **Profile Information** to export or click **Check All**.
4. Click **Export**. The selected data appears in an Excel spreadsheet.

Bulk update existing users   Available in Quartz Release

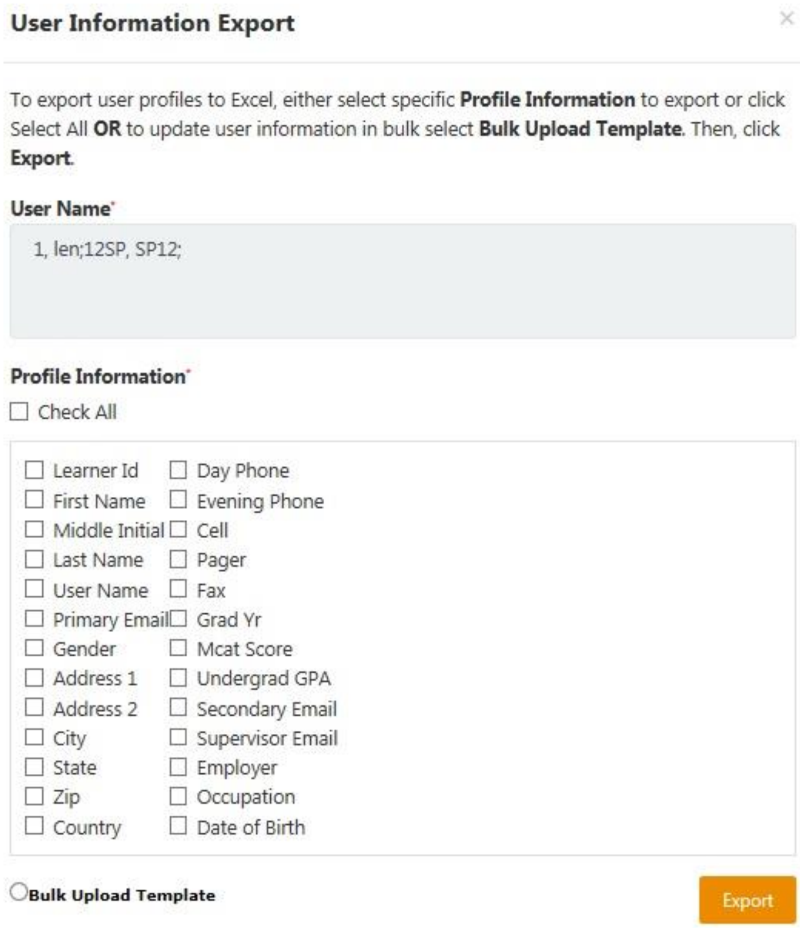
The Bulk Upload template appears with the following workflows to enable you to export existing user profiles (except passwords) to Excel to update in bulk, as well as add new users:

- Settings > User Management > User List
- Settings > User Management > User List > User Type
- Settings > User Management > User List > User Task Access
- Settings > User Management > User List > Learner Group
- Settings > User Management > Pending Users
- Settings > Search > Users



To export existing user profiles to Excel:

1. Click the checkboxes next to the users you want to export, update, and then re-upload.
2. Click the **Export** link.



3. Select specific **Profile Information** to export or click **Check All**

   OR

   select **Bulk Upload Template** to update user information in bulk.

4. Click **Export**.
5. Open, update and then save the spreadsheet as .xls or .xlsx.

   - When uploading the Excel file through Bulk Upload, existing user information with be updated with information from the Excel file. Existing data will not be overwritten if a field is left empty in the Excel file.

   - A **Status** column appears on the Bulk Upload Template to mark new and existing users as Active, Retired or Pending.

<u>Upload the completed spreadsheet</u>

Existing user information with be updated with information from the Excel file. Existing data will not be overwritten if a field is left empty in the Excel file.

1. On the SIMULATIONiQ Enterprise Bulk Upload screen, click **Browse**, select the file and then click **Open**. The file name appears in the **Select File** field.

2. Click **Upload** to upload the selected file.

> ***Note:*** For <u>existing</u> users, the current Task Access, Authentication Type and Access assignment will be updated with what's selected.

3. In the **Task Access** grid, select the Task Access Name and User Type (or click the **Create New Task Access** button to create a new role.)

4. In the **Authentication Type** grid, click the checkbox next to one or more authentication method(s) applicable to the user.

   - **EMS or SIMULATIONiQ Enterprise Authentication** – users will use the username and password indicated in the bulk upload sheet to log into SIMULATIONiQ Enterprise.

   - **Active Directory, LDAP, Single Sign-on** – users will use the username and password they use to log into their center's computers. This is coordinated with your IT department.

5. Then click the **Sort Order** to indicate the order in which the system will validate the username and password combination when the user logs in.

6. In the **Access** grid, the default Application Access will be selected automatically.

   Note: To select other Application Access other than the default settings, click the checkbox next to one or more applications the user can access.

7. Click **Next.**

Select Organization Unit and Learner Group (optional)

1. In the **Organization Structure** grid, select the level within the hierarchy to associate this group of users.

2. Select whether this group of users are **Members** and/or **Administrators**.

    a. ***Note***: **Learner Groups** are for Learner members. Learner Groups will allow you to filter your searches by Learner Groups, give access to video per Learner Group, allow learners to self-register for session (if you choose that type of session).

3. Click **Next**.

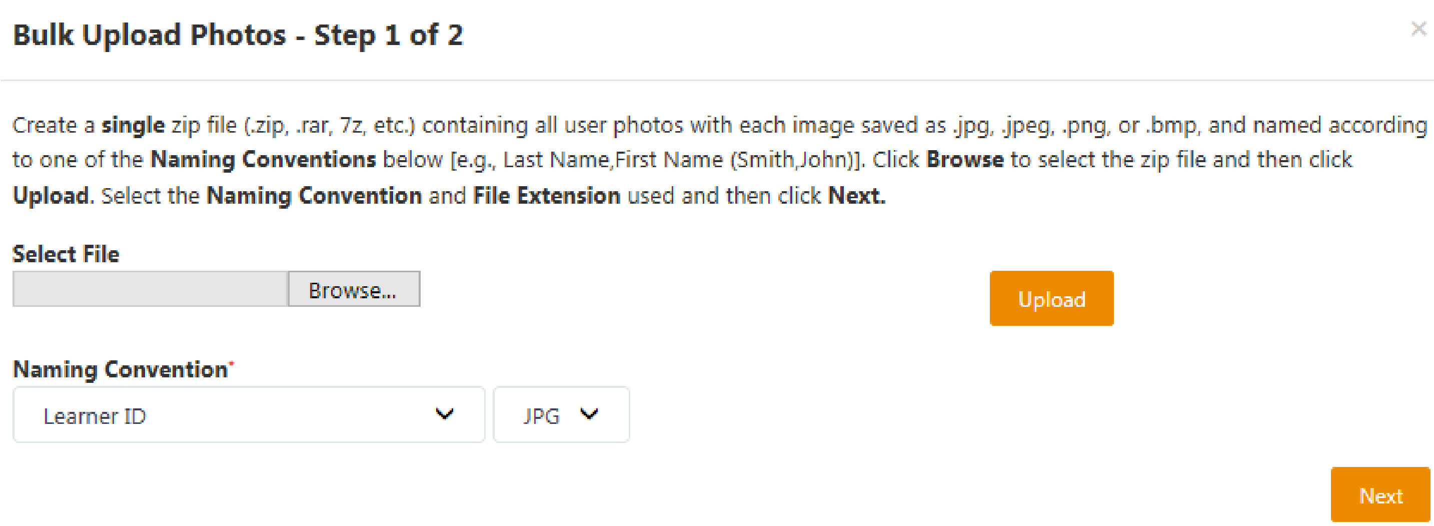
Preview and Import

1. Review the data displayed in the preview window and then click **Import.**
   ***Note*:** If information appears in the "Erroneous Fields" column, correct the data in the Excel spreadsheet and upload the corrected file.

Bulk Upload User Profile Photos

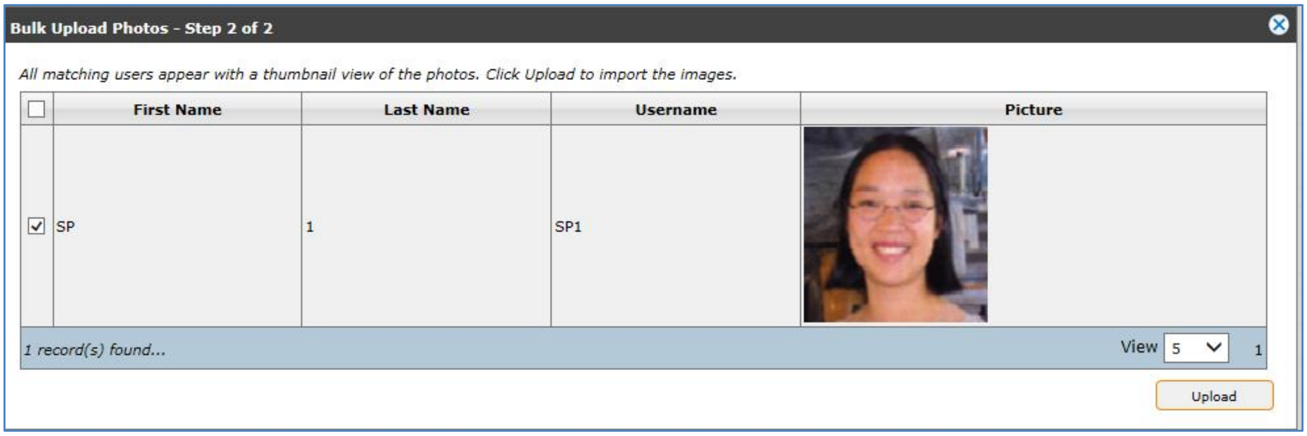
To add photos to many user profiles pages at once using the Bulk Upload Photo feature found in **Settings > System Administration > Bulk Upload Photos.**

1. Create a single zip file (.zip, .rar, 7z, etc.) containing all user photos with each image saved as .jpg, .jpeg, .png, or .bmp, **and named according to one of the Naming Conventions:**
    a. Last Name, First Name (Smith, John)
    b. Learner ID (ID that is in the Learner ID field of the User's Profile Page)
    c. First Name+Last Name (John+Smith)
    d. First Name Last Name (John Smith)
    e. First Letter in first name plus last name (J+Smith)
    f. First Name plus last letter in last name (John+S)



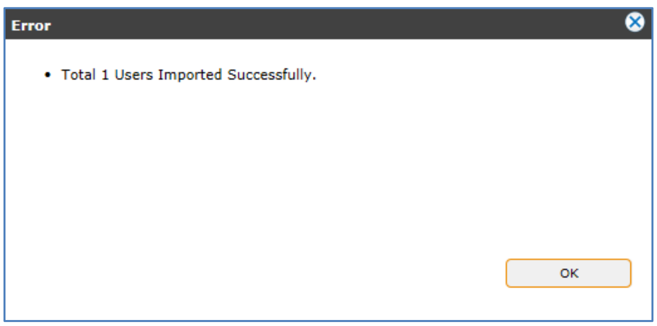
Step 1 of 2

2. Click **Browse** to locate and select the zip file.
3. Click **Upload**.
4. Select the File Extension used. Note: ***All files need to be of the same file format/extension.***
5. Click **Next.**



Step 2 of 2

1. Click the checkboxes next to the users you wish to upload and then click **Upload**. A confirmation screen appears.



2. Click **OK**.