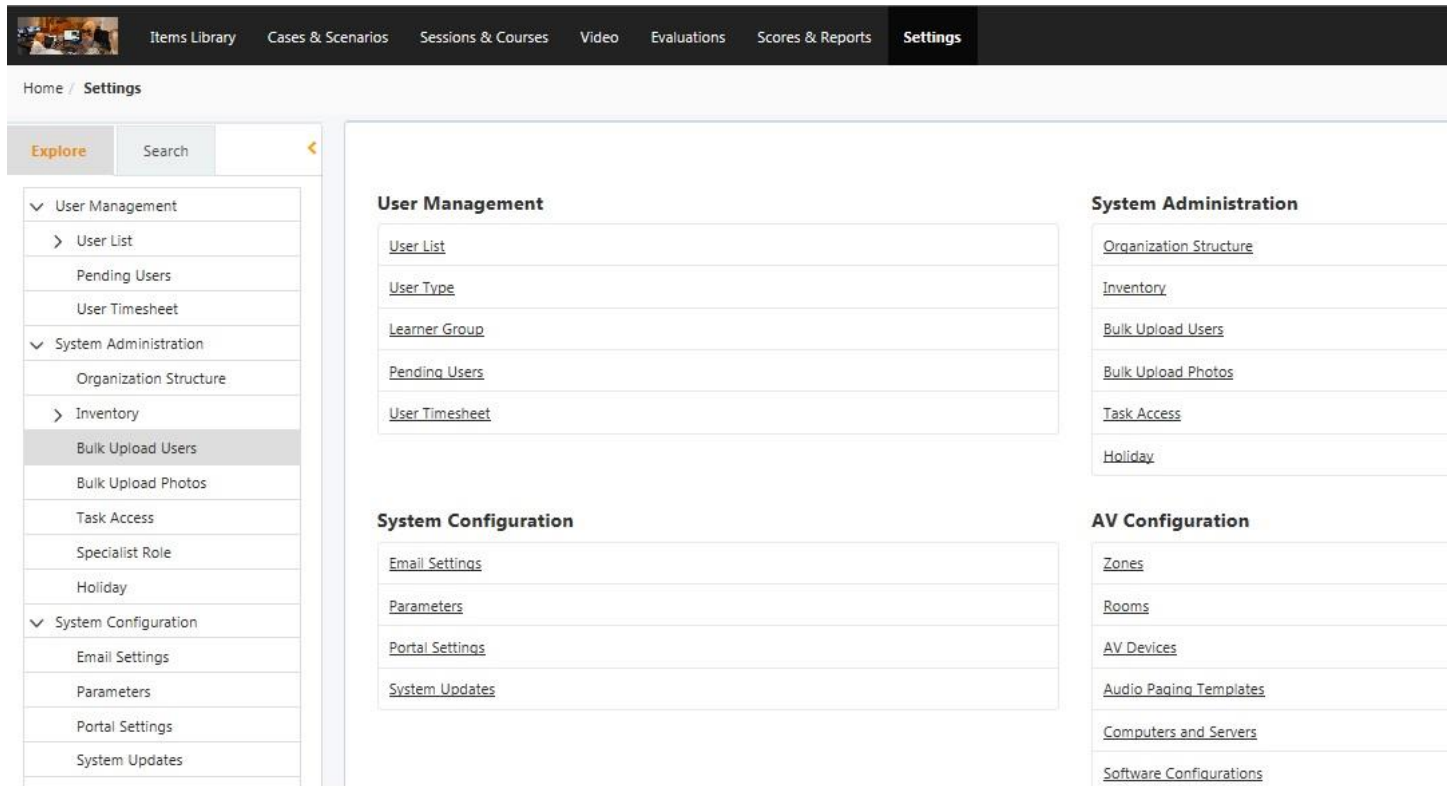


## Bulk Upload Users and Photos

The SIMULATIONiQ™ Enterprise application enables a SIMULATIONiQ Enterprise Administrator to create user accounts for Educators, SPs, Sim Techs and Learners through a bulk upload process.



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 sample file that shows the required fields and the order in which you must have the fields for a successful upload process.
2. Create a separate spreadsheet for each user type: Educator, SP, Learner. For Learners, required fields are: First Name, Last Name, User Name (for Active Directory "synchronization", this must be the user's Active Directory User Name), Email, and Password. Optionally include: Learner ID, Gender, Address, City, State, Zip, Phone. For all other users, include all required fields.  
**IMPORTANT!** Password must be at least 6 characters and must have at least one letter, one number and a special character.
3. Complete the template. **DO NOT** remove the first row.
4. Save each spreadsheet as .xls or .xlsx.
5. Click **Browse**, select the completed spreadsheet file and then click **Open**.
6. Click **Upload** to upload the selected file.
7. 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.
8. 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.
9. In the **Access** grid, click the checkbox next to one or more applications the user can access. Click **Next**.

#### Select File

#### Template

[Download Blank Template](#)

#### Task Access \*

<input type="checkbox"/>	Task Access Name	User Type
<input type="checkbox"/>	Administrator	Administrator
<input type="checkbox"/>	Faculty	Educator
<input type="checkbox"/>	Inventory Clerk	Learner
<input type="checkbox"/>	Live View Only	SP
<input type="checkbox"/>	SIM Tech	SIM Tech
<input type="checkbox"/>	SP	SP
<input type="checkbox"/>	SP Video Access	SP
<input type="checkbox"/>	SP View Only	Educator
<input type="checkbox"/>	Student	Learner

#### Authentication\*

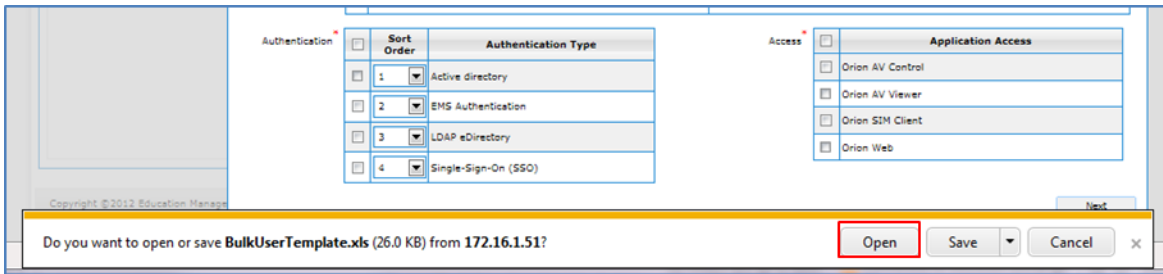
<input type="checkbox"/>	Sort Order	Authentication Type
<input type="checkbox"/>	1 ▾	Active directory
<input type="checkbox"/>	2 ▾	EMS Authentication
<input type="checkbox"/>	3 ▾	LDAP eDirectory
<input type="checkbox"/>	4 ▾	Single-Sign-On (SSO)

#### Access\*

<input type="checkbox"/>	Application Access
<input type="checkbox"/>	AV Control
<input type="checkbox"/>	AV Viewer
<input type="checkbox"/>	SIM Client
<input type="checkbox"/>	Web

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.**



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
- Primary Email
- Password

**Optionally include:** Learner ID, Middle Initial, Gender, Address 1, Address 2, City, State, Zip, Country, Day Phone, Evening Phone, Cell Phone, Pager, Fax, Grad Year, MCAT score, Undergrad GPA, Access Card ID, Secondary Email, Supervisor Email, Employer, Occupation.

- **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

**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 sample file that shows the required fields and the order in which you must have the fields for a successful upload process.
2. Create a separate spreadsheet for each user type: Educator, SP, Learner. For Learners, required fields are: First Name, Last Name, User Name (for Active Directory "synchronization", this must be the user's Active Directory User Name), Email, and Password. Optionally include: Learner ID, Gender, Address, City, State, Zip, Phone. For all other users, include all required fields.
- IMPORTANT!** Password must be at least 6 characters and must have at least one letter, one number and a special character.
3. Complete the template. **DO NOT** remove the first row.
4. Save each spreadsheet as .xls or .xlsx.
5. Click **Browse**, select the completed spreadsheet file and then click **Open**.
6. Click **Upload** to upload the selected file.
7. 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.
8. 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.
9. In the **Access** grid, click the checkbox next to one or more applications the user can access. Click **Next**.

Select File  No file chosen

Template [Download Blank Template](#)

	Task Access	Task Access Name	User Type
<input type="checkbox"/>		AV Team	Administrator
<input type="checkbox"/>		EMS Admin	Administrator
<input type="checkbox"/>		Faculty	Educator
<input type="checkbox"/>		IT Admin	Administrator
<input type="checkbox"/>		Orion Admin	Administrator
<input type="checkbox"/>		PostEncounter Login	Administrator
<input type="checkbox"/>		Session Requestor	Educator
<input type="checkbox"/>		SP	SP
<input type="checkbox"/>		SP Manager	Administrator
<input type="checkbox"/>		Student	Learner
<input type="checkbox"/>		Student Evaluator	SP
<input type="checkbox"/>		teacher	Educator
<input type="checkbox"/>		Video Educators	Educator

	Sort Order	Authentication Type
<input type="checkbox"/>	1	Active directory
<input type="checkbox"/>	2	EMS Authentication
<input type="checkbox"/>	3	LDAP eDirectory
<input type="checkbox"/>	4	Single-Sign-On (SSO)

	Application Access
<input type="checkbox"/>	Orion AV Control
<input type="checkbox"/>	Orion AV Viewer
<input type="checkbox"/>	Orion SIM Client
<input type="checkbox"/>	Orion Web

7. 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.
8. Click **Upload** to upload the selected file.
9. 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.)

10. 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.
11. 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.
12. 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.
13. Click **Next**.

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

**Step 2 of 3: Select Organization, Learner Group**

Select the Organization Unit within the Organization Structure and the Learner Group to assign the users to and then click **Next**.

Organization Structure	Search <input type="text"/>	Search	Expand All	Collapse All
	<b>Organization Structure</b>			
<input type="checkbox"/>	EMS University		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	SON		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	SOM		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	JCHS		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	NRCC		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	NJMHegem		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Learner Group 1		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Graduation 2014		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	CLIENT SUPPORT		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	test2		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	test3		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	SOPh		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	SOMidwifery		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	SOMED		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	UCF_COM		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	YOLO		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	MAA Discovery		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	USC		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	IMSAL		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	NICC_Nursing		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	LG apx		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	PT practice		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	COM		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Oklahoma State Branch of EMS		<input type="checkbox"/>	<input type="checkbox"/>

Learner Group	Learner Group
<input type="checkbox"/>	SON
<input type="checkbox"/>	SOM

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							

- 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 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)

### Bulk Upload Photos - Step 1 of 2 ×

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** below [e.g., Last Name,First Name (Smith,John)]. Click **Browse** to select the zip file and then click **Upload**. Select the **Naming Convention** and **File Extension** used and then click **Next**.

#### Select File

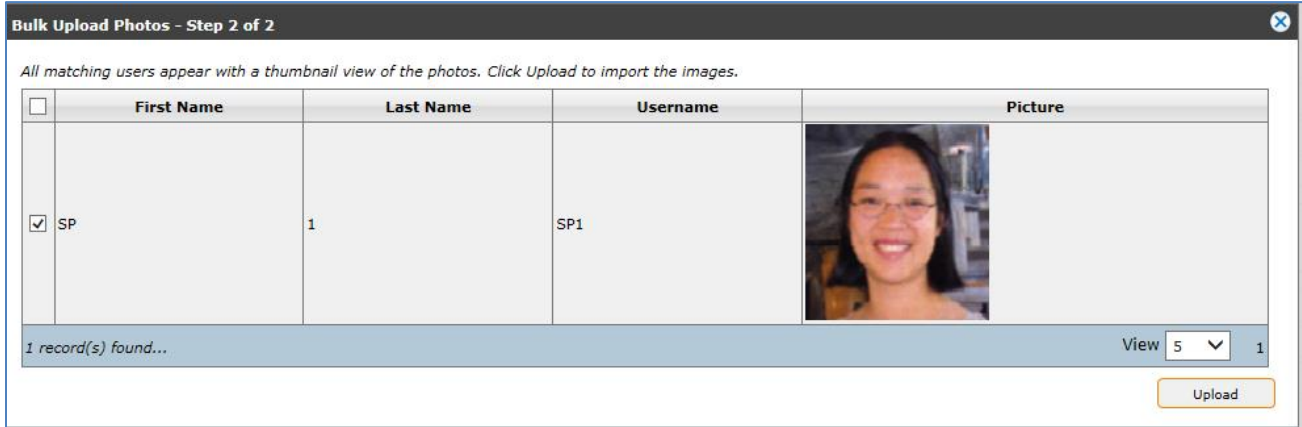
 Browse...

#### Naming Convention\*

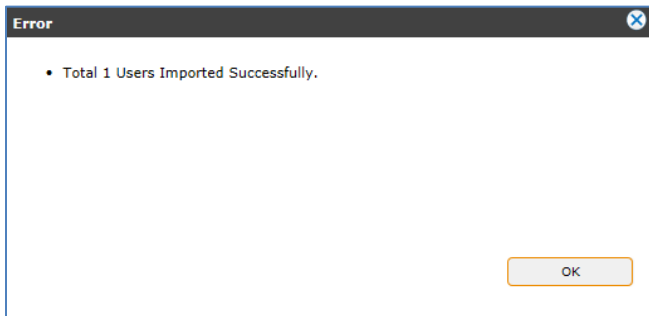
### Step 1 of 2

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**.