



Manually Import and Manage User Accounts



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Introduction

Users are typically created, updated and unenabled by the People Data Feed, however Users can also be manually added to Learn using the Kallidus User Import function (KUI). This may be necessary to allow access to Learn for temporary workers, contractors, and seasonal staff - Users who are not added to Learn via the People Data Feed, but who require access to Learn.

KUI can also perform additional functions during the import process, for example creating new Groups and assigning Users directly to Groups. See the [‘Additional KUI functions’](#) section of this guide (p18) for more information.

This document describes how to use KUI to import new Users and maintain/update User information.

Background

When importing new Users, the following information must be provided as a minimum:

- First name
- Last name
- Username*
- Email address**

**Username must be a unique field. It can include numeric values and special characters.*

***Although not a mandatory field, It is highly recommended that an email address is also provided. Without an email address, a User cannot receive notifications or reset their own password.*

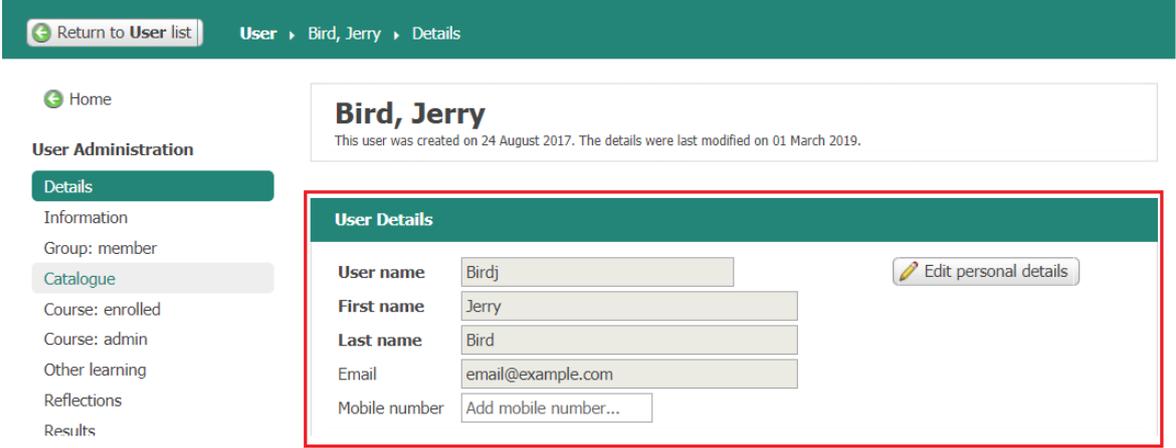
KUI imports this generic User information into both KIP (The Kallidus Identity Provider) and Learn. Along with the Users password, these credentials will be referenced when a User attempts to log into Learn. See the [‘Create and sharing passwords’](#) section of this guide (p16) for more information.

Note: Imported Users will be automatically unenabled if the total number of Users exceeds the maximum specified in your licence.



Where User information is saved

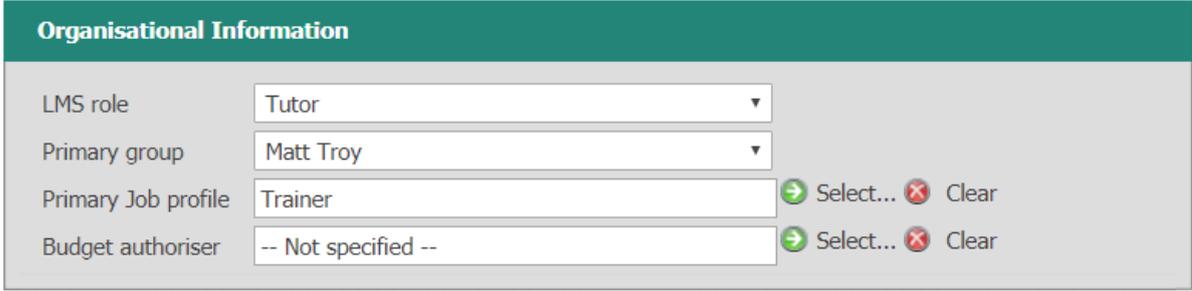
This information is saved in the 'Details' page for each User. These are generic fields. They are the same for all Kallidus customers:



The screenshot shows a user profile page for 'Bird, Jerry'. The page has a green header with a 'Return to User list' button and a breadcrumb 'User > Bird, Jerry > Details'. On the left is a sidebar with 'User Administration' and 'Details' (highlighted) sections. The main content area is titled 'User Details' and contains the following fields:

User name	<input type="text" value="Birdj"/>	Edit personal details
First name	<input type="text" value="Jerry"/>	
Last name	<input type="text" value="Bird"/>	
Email	<input type="text" value="email@example.com"/>	
Mobile number	<input type="text" value="Add mobile number..."/>	

In addition to this basic information, KUI can also populate information in the 'Organisational Information' section in the 'Details' page for each User. These fields are the same for all Kallidus customers. Note: If no LMS Role is specified, the User will be automatically assigned the role of 'Student':



The screenshot shows the 'Organisational Information' section with the following fields:

LMS role	<input type="text" value="Tutor"/>	
Primary group	<input type="text" value="Matt Troy"/>	
Primary Job profile	<input type="text" value="Trainer"/>	Select... Clear
Budget authoriser	<input type="text" value="-- Not specified --"/>	Select... Clear

KUI can also insert/update User information fields. These fields are unique to each customer. User information fields may contain for example the department, region, grade or division in which Users work

User Information Fields are saved in the 'Information' section of a User's profile. The below screenshot includes some typical examples of User Information Fields:



[Return to User list](#)

User > Bird, Jerry > Information

[Home](#)

User Administration

Details

Information

- Group: member
- Catalogue
- Course: enrolled
- Course: admin
- Other learning
- Reflections
- Results
- Job profile
- Accreditation
- CPD programmes
- Book event
- Send email
- Report

Bird, Jerry

This user was created on 24 August 2017. The details were last modified on 01 March 2019.

General Information Diversity Photo

Import key

Preferred training location

Location	Head Office
Division	Operations
Department	L&D
Region	South
Grade	Grade A
Employment type	Full time
Long term absence	No



Recruit



LMS



Performance



360



Talent



Content

Import new Users

For this example, five new Users will be added to Learn. The import spreadsheet looks like this:

	A	B	C	D	E	F	G	H	I	J	K
1	Username	First Name	Last Name	Email	Primary Job Profile	LMS Role	Primary Group	Location	Division	Team	Region
2	Clintonp	Pat	Clinton	email@exar	Account Manager	Student	Debarteloj	Head Office	Operations	Accounts	West
3	Carratherl	Louise	Carrather	email@exar	HR Administrator	Student	talbotr	Head Office	Operations	HR	East
4	Briced	Dan	Brice	email@exar	Digital Marketer	Student	Feelyk	Head Office	Operations	Marketing	North
5	Hoguej	Jock	Hogue	email@exar	Finance assistant	Manager	Debarteloj	Head Office	Operations	Accounts	West
6	Wynneb	Ben	Wynne	email@exar	Trainer	Tutor	talbotr	Head Office	Operations	L&D	West
7											
8											

- Columns A to D will populate the 'User Details' section of the User Details page
- Columns E to G will populate the 'Organisational Information' section
- Columns H to K will populate 'User Information Fields'

To create new Users using a KUI import:

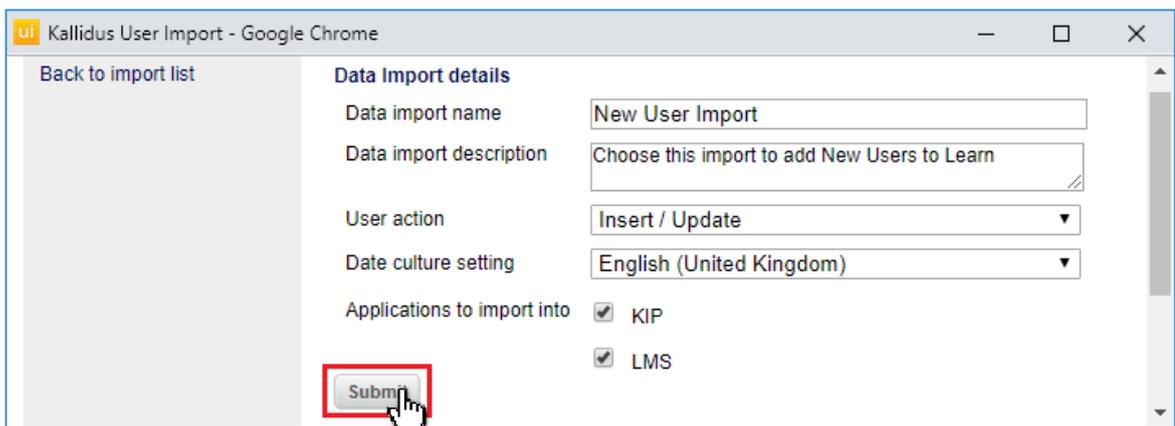
1. **Open KUI.** Navigate to 'Administration Home' and select 'User'. Scroll to the end of the page and select 'Import'. This will open KUI:

Garrity, Marilyn	Garritym	Marleen Roseman	Support Consultant
Gendron, Earnest	Gendrone	Larry Lindquist	Sales Manager
Gill, Graham	Gillg	Julie Julieson	Product Owner

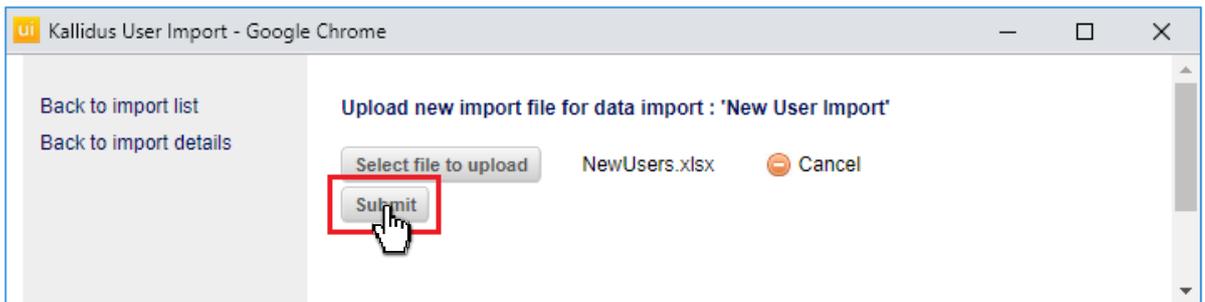
1 2 3 4



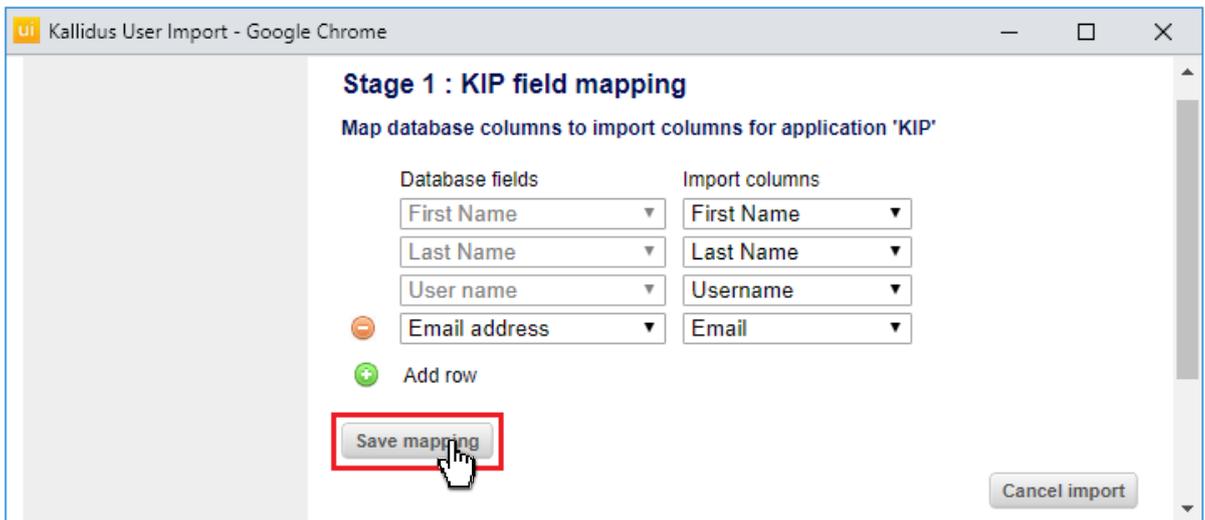
2. **Create a new import.** Click 'Add new import' in the top left of the window. Specify a name and description. This will identify the import should it need to be repeated in future. Select the required User action (to Insert/Update or delete imported User records) and choose which applications to import into (KIP / LMS - for new imports select both KIP and Learn). Click 'Submit' to continue:



- 3. Upload a data file.** Click 'Select File to upload' and browse to the spreadsheet containing the data for import. Click 'Submit' to select. If the import spreadsheet contains multiple sheets an additional prompt to select the correct spreadsheet will appear. Click 'Submit' to continue.

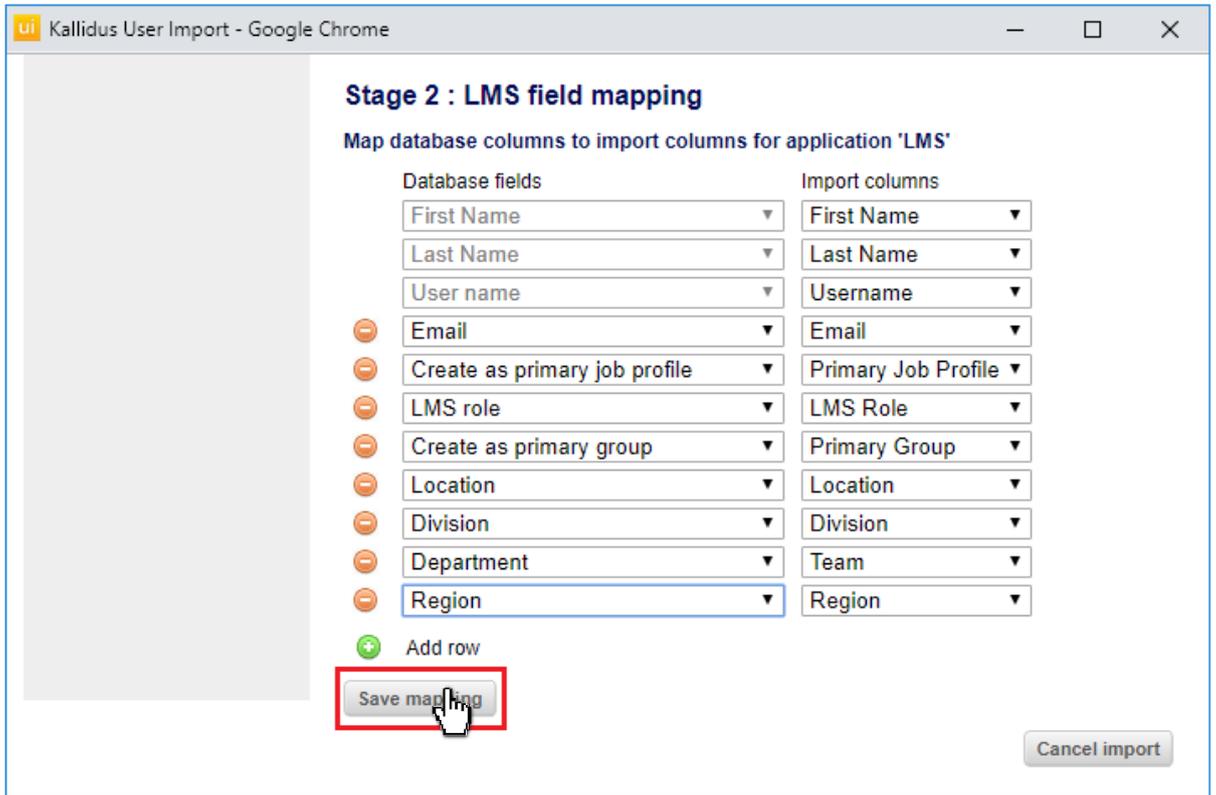


- 4. Map the User details to KIP.** The columns in the import spreadsheet must now be mapped to the appropriate fields in KIP. Fields in KIP are shown in drop-down menus on the left of the screen, and fields in the import spreadsheet are on the right. KUI will attempt to match the fields. Save time at this step by configuring the import spreadsheet with column titles to match the destination fields in KIP. When the fields are all mapped, click 'Save mapping' to continue.



- 5. Map the User details to Learn.** The columns in the import spreadsheet must now be mapped to the appropriate fields in Learn. This will include the same fields as previously mapped to KIP. It may also include additional 'Organisational Information' and 'User information' fields. Rows can be added or deleted using the symbols to the left of the mapping menu. When all required spreadsheet columns are

mapped, click 'Save mapping' to continue:



Stage 2 : LMS field mapping

Map database columns to import columns for application 'LMS'

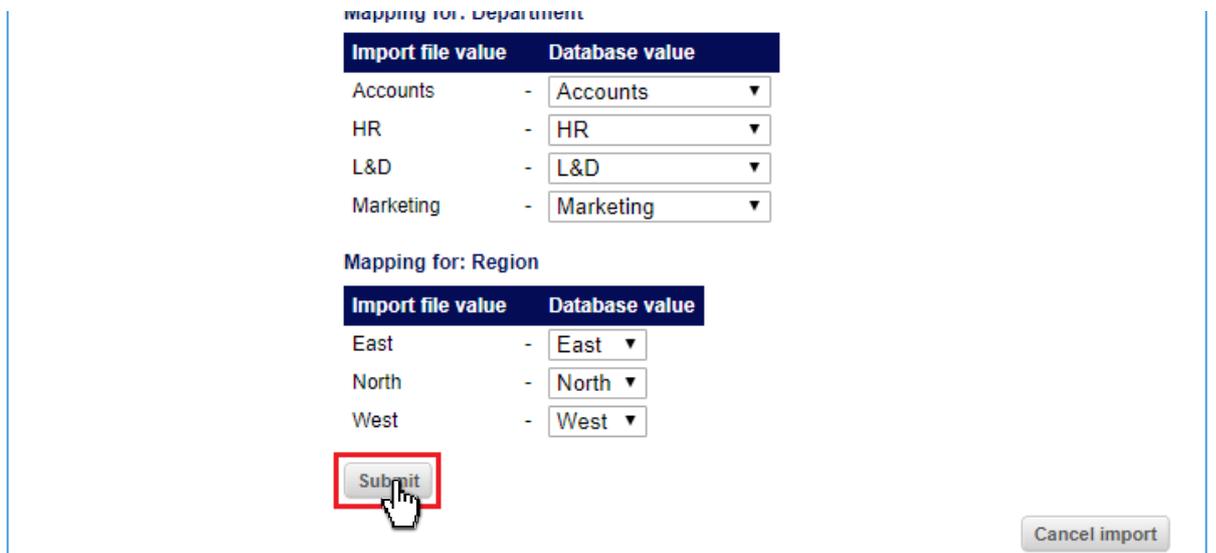
Database fields	Import columns
First Name	First Name
Last Name	Last Name
User name	Username
Email	Email
Create as primary job profile	Primary Job Profile
LMS role	LMS Role
Create as primary group	Primary Group
Location	Location
Division	Division
Department	Team
Region	Region

+ Add row

Save mapping (highlighted)

Cancel import

- Map LMS Fields values.** KUI will attempt to match fields and values in the import spreadsheet, with the corresponding field in Learn. This may be default fields, such as LMS Role or User Information Fields. Check and correct the Field Values as required, then Click 'Submit' to continue:



mapping for: Department

Import file value	Database value
Accounts	Accounts
HR	HR
L&D	L&D
Marketing	Marketing

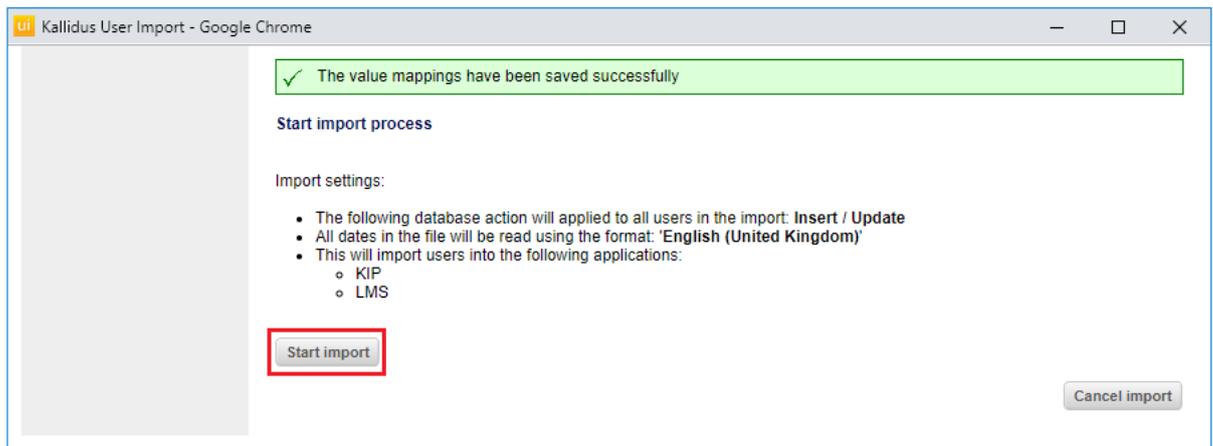
Mapping for: Region

Import file value	Database value
East	East
North	North
West	West

Submit (highlighted)

Cancel import

- 7. Start the import process.** Before starting the import take a moment to review the import settings. If any changes are required, click 'Cancel' and return to the start of the Import. Mappings will be saved but can be edited if required. Click 'Start Import' when ready to continue. A progress bar appears and the 'Start import' button is replaced with a 'Stop import' button. If stopped, the import will continue to process the current row in the import spreadsheet before interrupting the import.



- 8. Review the import.** Once the import is complete, Click 'View results' to see a summary screen which will detail how successful the import has been. It will contain the following details:

Records processed	The total number of rows containing data
Successfully processed records	The number of data rows imported successfully
Errors	The number of rows which failed to import
Warnings	The number of rows imported, but with partial failure

- 9. Close the import.** The required actions are performed, and the import is complete. The mappings are saved, so the import can be repeated if necessary. Mappings can be changed but progress through the import will be quicker next time if no edits are required.

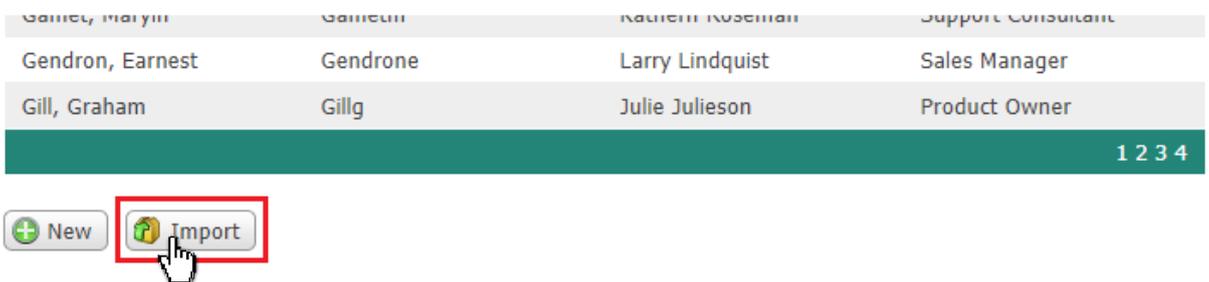
Note: The import history can be reviewed in the future if required. See the ['View import history'](#) section of this guide (p11) for more information. The same import can be reused to update User information. See the ['Repeat an import'](#) section of this guide (p13) for more information.

View import history

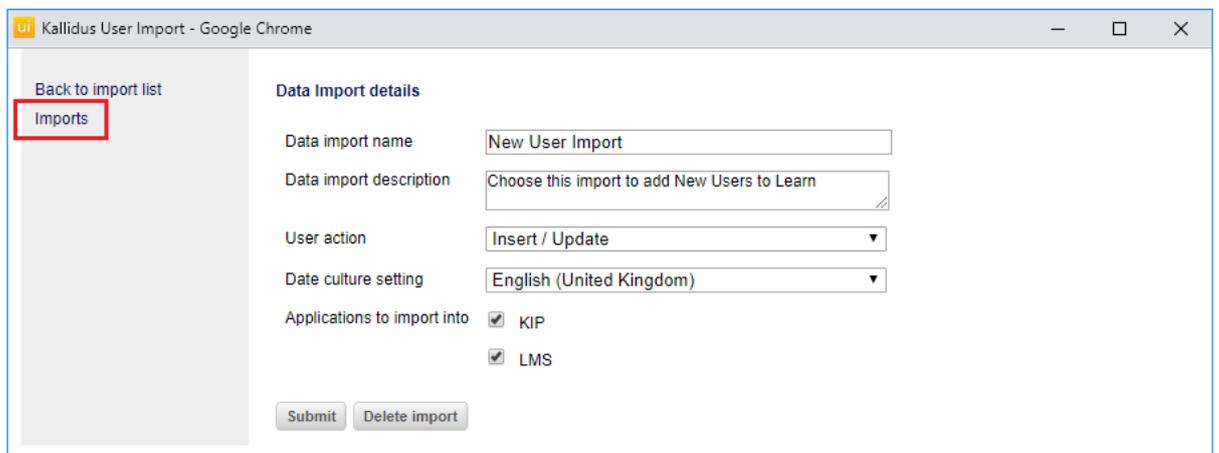
The details of every complete or partial import are saved and can be reviewed at any time. Cancelled imports can be continued, and the properties of complete imports can be reviewed.

To view or edit an import:

1. **Open KUI.** Navigate to 'Administration Home' and select 'User'. Scroll to the end of the page and select 'Import'. This will open KUI:

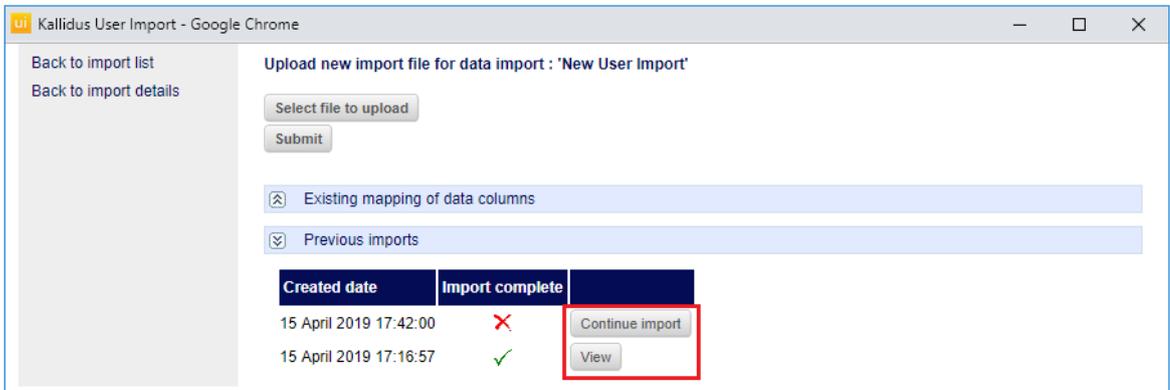


1. **View previous imports.** Select an import definition from the list. Click 'Imports' to view previous imports:



2. **Select an import, view the properties.** Select an import from the list. Click 'View' to see the import history including the created date, import start date, and import end date can be viewed. Click 'Continue import'

to continue the import. The imported file can also be downloaded.



Created date	Import complete	
15 April 2019 17:42:00	✗	Continue import
15 April 2019 17:16:57	✓	View

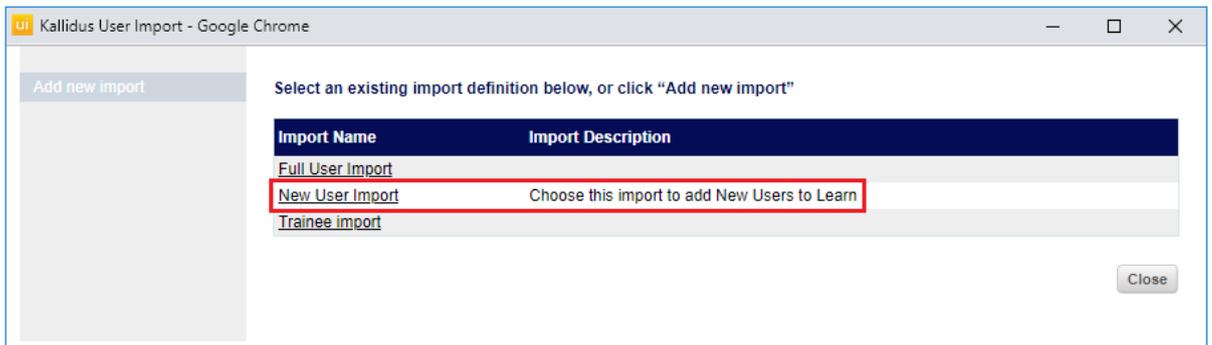
Repeat an import to delete or update User profiles

A previously used import definition can be reused to delete Users, or to update User information. The import process is quicker when an existing mapping definition is reused. Mappings can be edited if required.

Note that only Manually Added Users should be maintained in this way. If Users have been added by the People Data Feed, then profiles must continue to be maintained by the People Data Feed.

To reimport to update User information:

1. **Navigate to the import list.** Navigate to 'Administration Home' and select 'User'. Scroll to the end of the page and select 'Import'. This will open KUI. Previous import definitions are listed. Click to open an import definition:



Kallidus User Import - Google Chrome

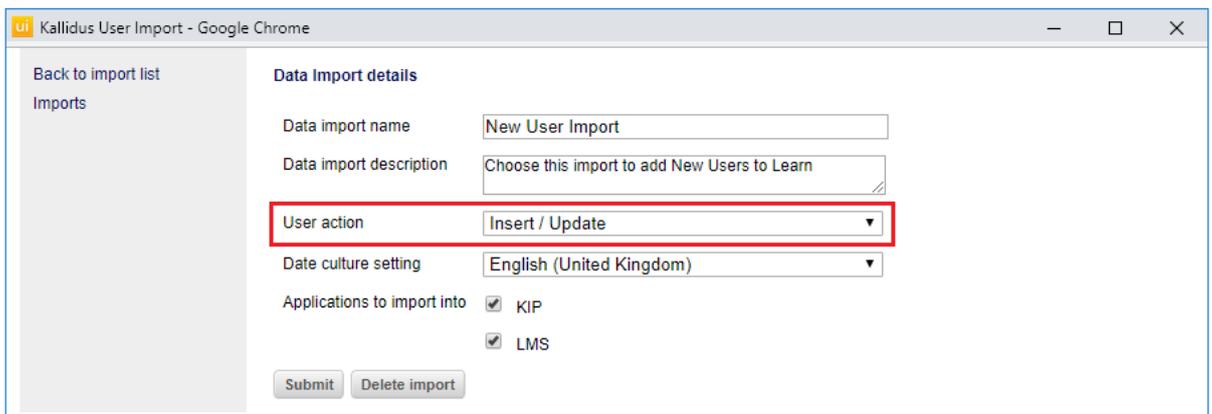
Add new import

Select an existing import definition below, or click "Add new import"

Import Name	Import Description
Full User Import	
New User Import	Choose this import to add New Users to Learn
Trainee import	

Close

2. **Choose a User action.** Two options are available. 'Delete' will delete Users from the LMS where the import key/username matches. 'Insert / Update' will add new Users, or update User details where the Import key/Username matches.



Kallidus User Import - Google Chrome

Back to import list
Imports

Data Import details

Data import name:

Data import description:

User action:

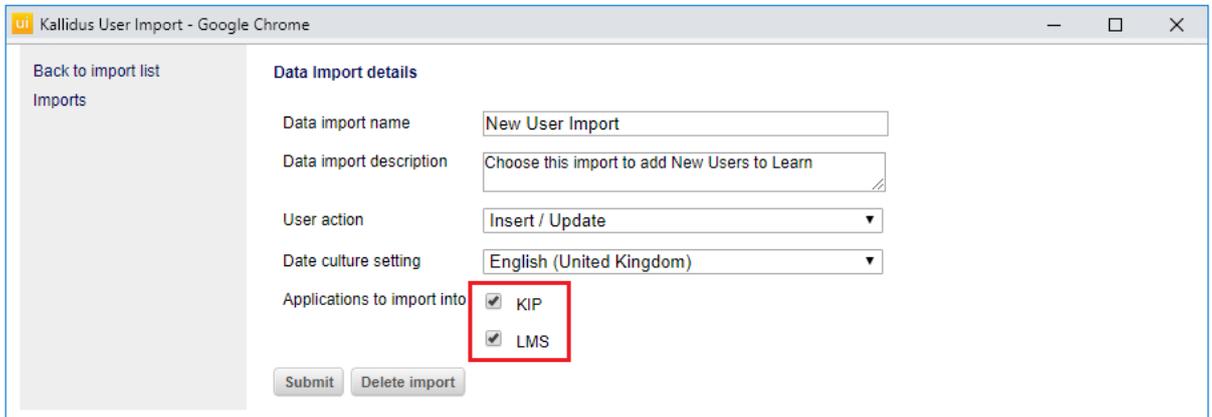
Date culture setting:

Applications to import into: KIP LMS

Submit Delete import

3. **Choose the application to import into.** If the imported information will change anything about the Users basic information (Import Key, Username, First name, Last name and email address) then select both KIP

and Learn. If the import will update Information Fields only, then 'LMS' only can be selected.



Data Import details

Data import name:

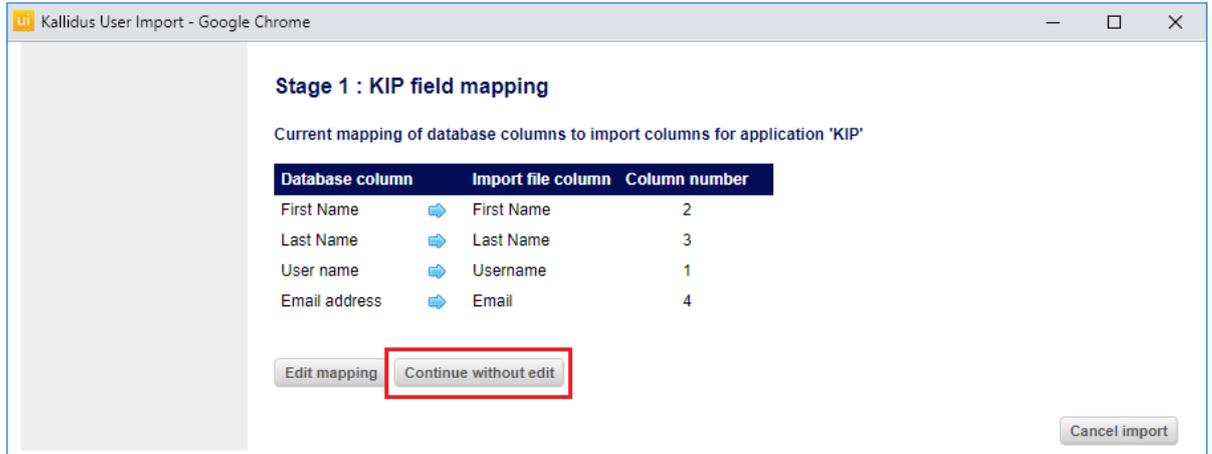
Data import description:

User action:

Date culture setting:

Applications to import into: KIP LMS

- 4. Import spreadsheet and check mappings.** Browse to and select the import spreadsheet containing the amended information. If the spreadsheet contains the same columns and no changes to the mappings are required, then click 'Continue without edit' until the 'Start Import' page is reached. If the structure of the import has changed, fields must be remapped:



Stage 1 : KIP field mapping

Current mapping of database columns to import columns for application 'KIP'

Database column	Import file column	Column number
First Name	First Name	2
Last Name	Last Name	3
User name	Username	1
Email address	Email	4

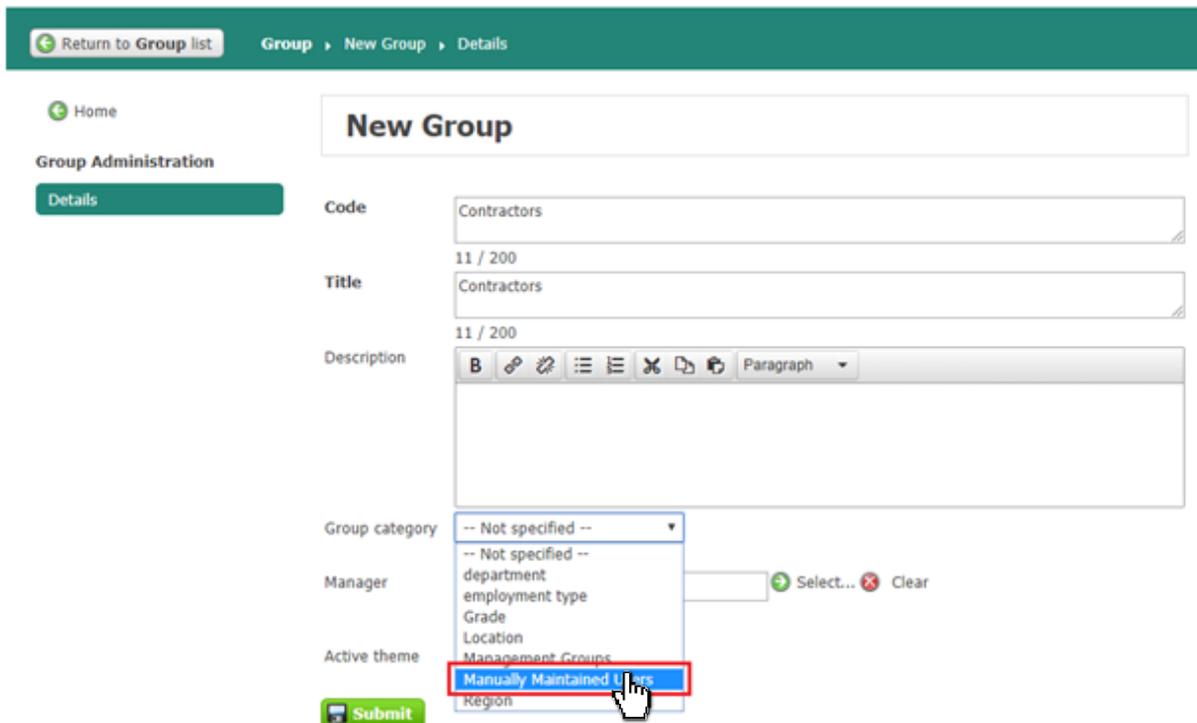
- 5. Start the import, view the results.** Once mappings are checked/changed then the import is ready to run.

Manage manually added Users

When a User profile exists in Learn but does not appear in the People Data Feed, it will be assumed they are a leaver, and the User will be unenabled*. This will apply to any Users added manually via KUI import or individually.

To prevent manually added Users being automatically unenabled by the People Data feed, they can be added to a Group with the Category of 'Manually Maintained Users'. Members of a Group with this category will be ignored by the People Data Feed and can, therefore, continue to access Learn *even if they are not part of the People Data Feed from the HR system*.

Provided a User is a member of one Manually Maintained User group, they can be a member of any other Groups. Group category is specified on the 'Details' page when creating a new Group, or viewing an existing Group:



Return to Group list Group > New Group > Details

Home

Group Administration

Details

New Group

Code: Contractors
11 / 200

Title: Contractors
11 / 200

Description: [Rich text editor with Paragraph selected]

Group category: -- Not specified --
 -- Not specified --
 department
 employment type
 Grade
 Location
 Management Groups
 Manually Maintained Users
 Region

Manager: [Text field] Select... Clear

Active theme: [Text field]

Submit

Note: A leave date will also be added to the User profile. In order that the User can be re-enabled, the leave date must be removed.

Manage User passwords

When importing new Users, the administrator must determine how each Users password will be created. There are three options:

- Specify individual passwords in the import spreadsheet
- Specify a generic password during the import process
- Generate a random password during the import process

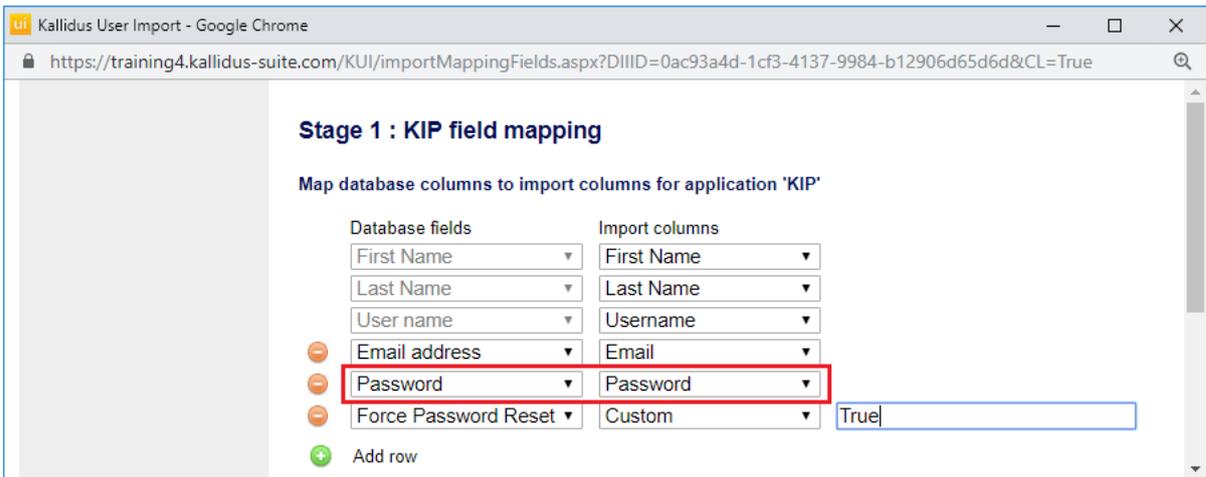
In each scenario, Users can be required to reset their password when they first log in. Password complexity is configured as part of the implementation process. [Contact the HelpDesk team](#) to review password complexity in your organisation.

When new Users are imported into the site, the default email template 'UserCreated' will be triggered. This email will include by default the Users login credentials (Username and password). The wording and content of the template can be changed if required.

Please see the ['Configuring email communications' guide in the Help Centre](#) for more information about viewing and editing KIP email templates.

Specify individual passwords in the import spreadsheet

The import spreadsheet must contain a column titled 'password'. The administrator should populate this column with a password for each User. During the import process, this column is mapped to the corresponding database field, as in the screenshot below. This would enable the administrators to specify different passwords for each imported User.



Stage 1 : KIP field mapping

Map database columns to import columns for application 'KIP'

Database fields	Import columns
First Name	First Name
Last Name	Last Name
User name	Username
Email address	Email
Password	Password
Force Password Reset	Custom

True

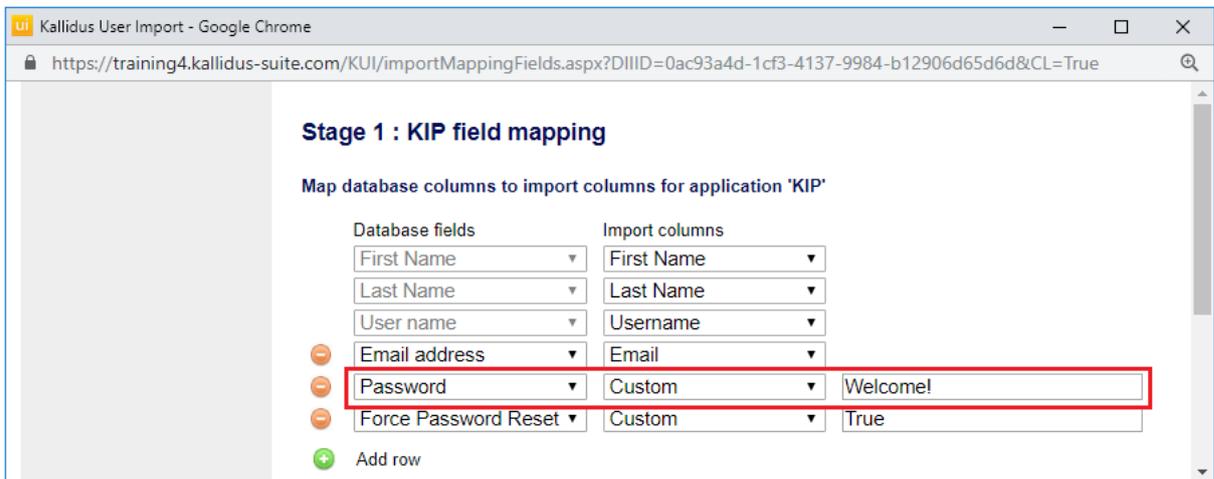
Add row

In this example, a row is added in which the database field 'Force Password Reset' is mapped to the option of 'Custom' in the import spreadsheet. The Custom option allows the Administrator to specify an option as a default value for *all* imported Users. By adding 'True' as the custom field, Users will be required to choose a new password once they have logged in.

Specify a generic password during the import process

The import spreadsheet does not contain a column containing User passwords. Instead, the option of 'Custom' is selected in the import column, and a generic password is specified for all Users.

In this example, the password 'Welcome!' is specified for all Users. The Database field 'Password' is mapped to the option of 'Custom' in the import spreadsheet. The Custom option allows the Administrator to specify an option as a default value for *all* imported Users. By adding 'True' as the custom field, Users will be required to choose a new password once they have logged in.

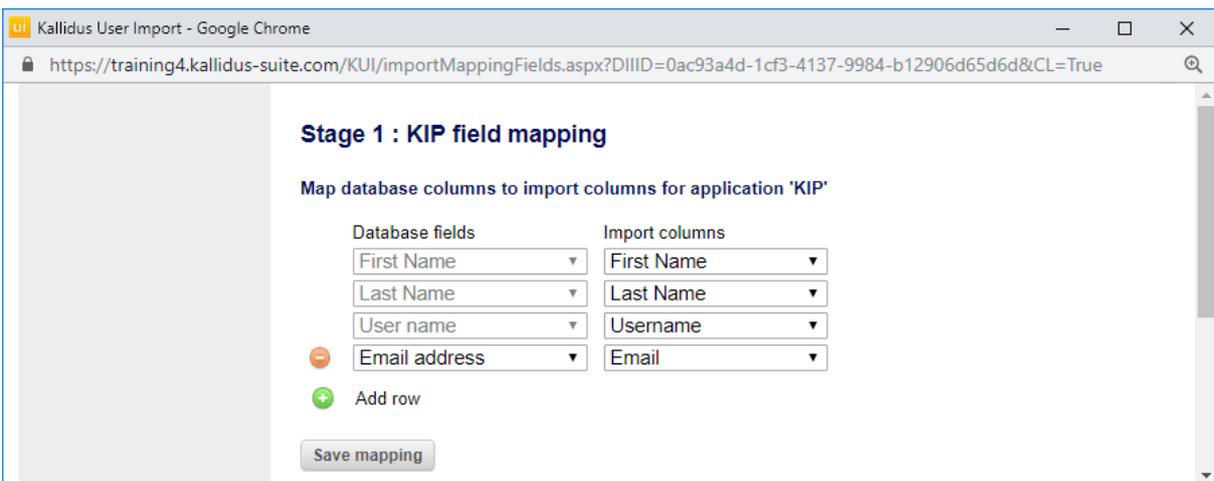


The screenshot shows the 'Stage 1 : KIP field mapping' interface. It displays a table for mapping database fields to import columns for application 'KIP'. The 'Password' row is highlighted with a red box, showing 'Custom' selected for the import column and 'Welcome!' entered in the adjacent text field. The 'Force Password Reset' row shows 'True' entered.

Database fields	Import columns	
First Name	First Name	
Last Name	Last Name	
User name	Username	
Email address	Email	
Password	Custom	Welcome!
Force Password Reset	Custom	True

Generate a random password during the import process

If no mapping is made for 'User password' as in the below screenshot, then KIP will generate a random password for each User.



The screenshot shows the 'Stage 1 : KIP field mapping' interface. It displays a table for mapping database fields to import columns for application 'KIP'. The 'Password' field is not present in the mapping table. A 'Save mapping' button is visible at the bottom.

Database fields	Import columns
First Name	First Name
Last Name	Last Name
User name	Username
Email address	Email

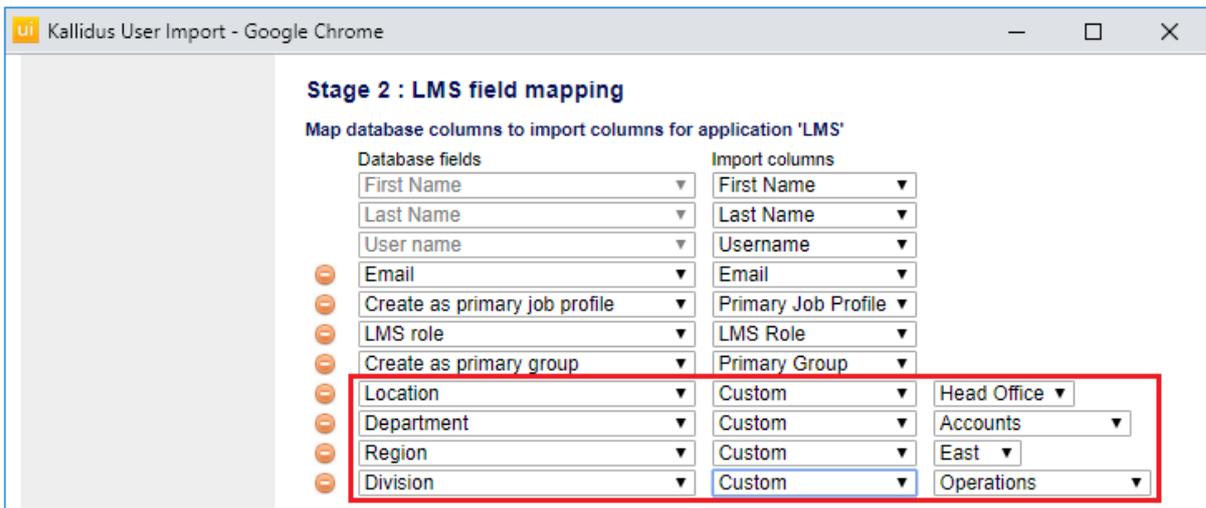
Bulk import actions

A custom value can be selected for database fields when importing new Users or updating existing Users. The custom value is applied to all imported Users.

The below examples assume that Users are being imported for the first time, so KIP fields are also specified. If updating details, this can be excluded from mapping.

Assign a User Information Field value to all imported Users

All Users need to be assigned the same UIF. Instead of selecting a column in the spreadsheet, Custom is selected, and an available value for the UIF can be selected to apply to all imported Users.

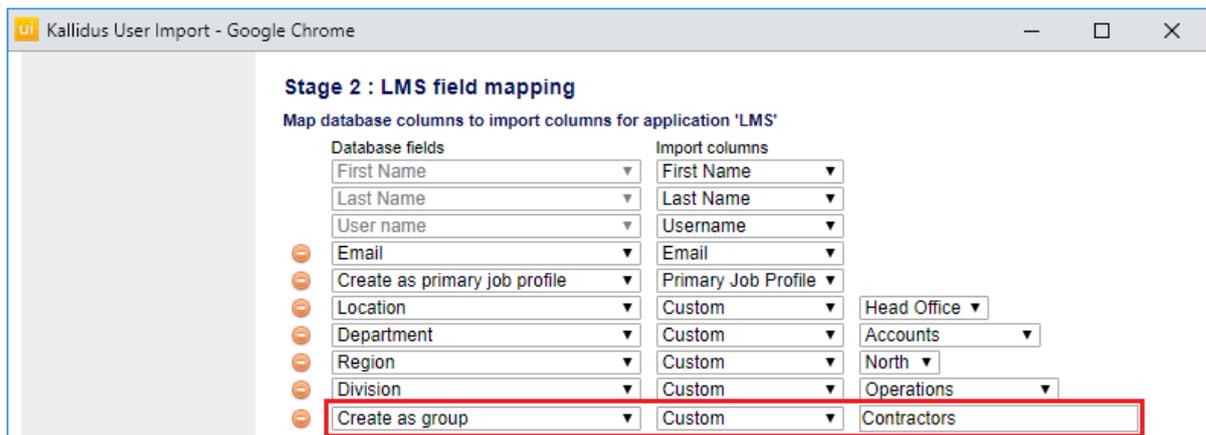


Database fields	Import columns	
First Name	First Name	
Last Name	Last Name	
User name	Username	
Email	Email	
Create as primary job profile	Primary Job Profile	
LMS role	LMS Role	
Create as primary group	Primary Group	
Location	Custom	Head Office
Department	Custom	Accounts
Region	Custom	East
Division	Custom	Operations

Note: Group rules may be based on these values which could, therefore, add Users to appropriate Groups.

Assign imported Users to a new or existing Group

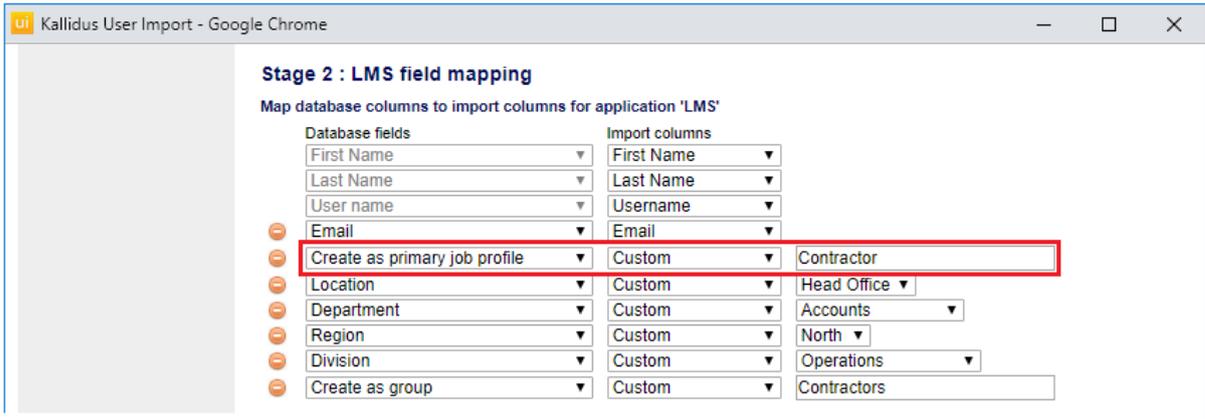
Select 'Create as Group' in the Database column and 'Custom' in the import column. Type the name of an existing Group or a new Group to which all Users should be added. If a Group exists with the name specified, Users will be added to it. If no exact match is found, a new Group will be created, and Users assigned.



Database fields	Import columns	
First Name	First Name	
Last Name	Last Name	
User name	Username	
Email	Email	
Create as primary job profile	Primary Job Profile	
Location	Custom	Head Office
Department	Custom	Accounts
Region	Custom	North
Division	Custom	Operations
Create as group	Custom	Contractors

Assign imported User a new or existing Primary Job Profile

Select 'Create as Primary Job Profile' in the Database column, and 'Custom' in the import column. Type the name of an existing Primary Job Profile or a new Job Profile to which all Users should be assigned. If a Job Profile exists with the name specified, Users will be added to it. If no exact match is found, a new Primary Job profile will be created, and Users assigned.



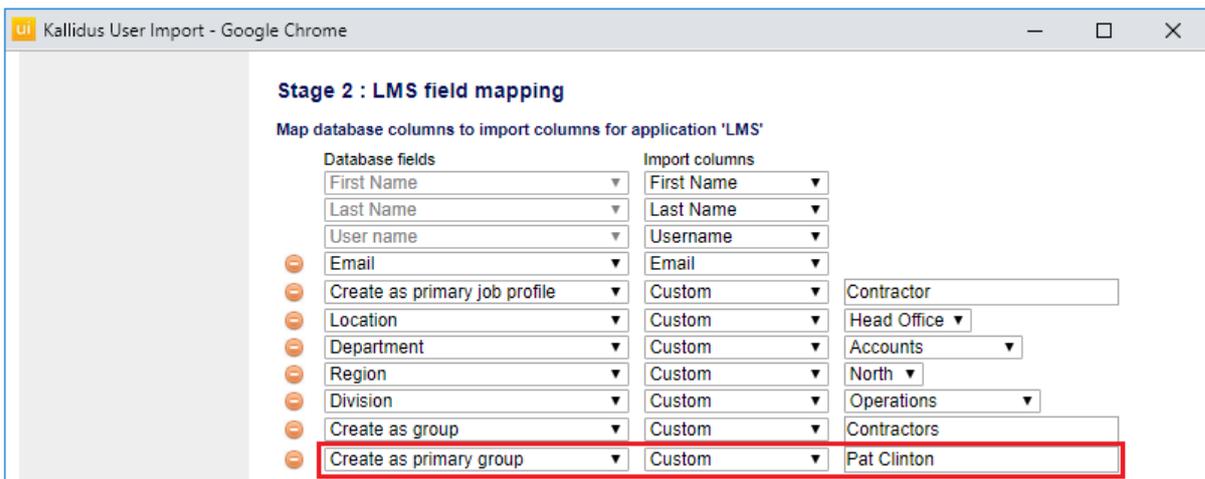
Stage 2 : LMS field mapping

Map database columns to import columns for application 'LMS'

Database fields	Import columns	
First Name	First Name	
Last Name	Last Name	
User name	Username	
Email	Email	
Create as primary job profile	Custom	Contractor
Location	Custom	Head Office
Department	Custom	Accounts
Region	Custom	North
Division	Custom	Operations
Create as group	Custom	Contractors

Assign imported User to a Primary group

The Primary Group must already have a manager assigned. You cannot make a User a group manager via import. If no manager specified, the whole import will fail. If no Group exists with a manager assigned, the whole import will fail. This does not create a Group.



Stage 2 : LMS field mapping

Map database columns to import columns for application 'LMS'

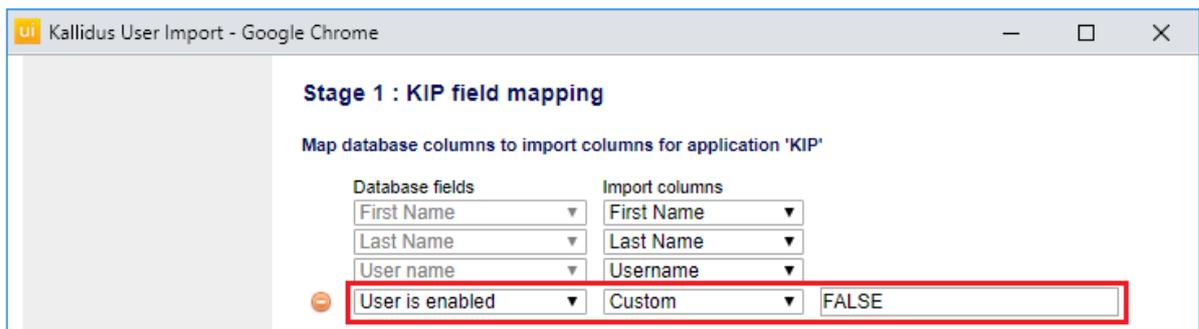
Database fields	Import columns	
First Name	First Name	
Last Name	Last Name	
User name	Username	
Email	Email	
Create as primary job profile	Custom	Contractor
Location	Custom	Head Office
Department	Custom	Accounts
Region	Custom	North
Division	Custom	Operations
Create as group	Custom	Contractors
Create as primary group	Custom	Pat Clinton

Set the availability (enabled/unenabled) for all imported Users

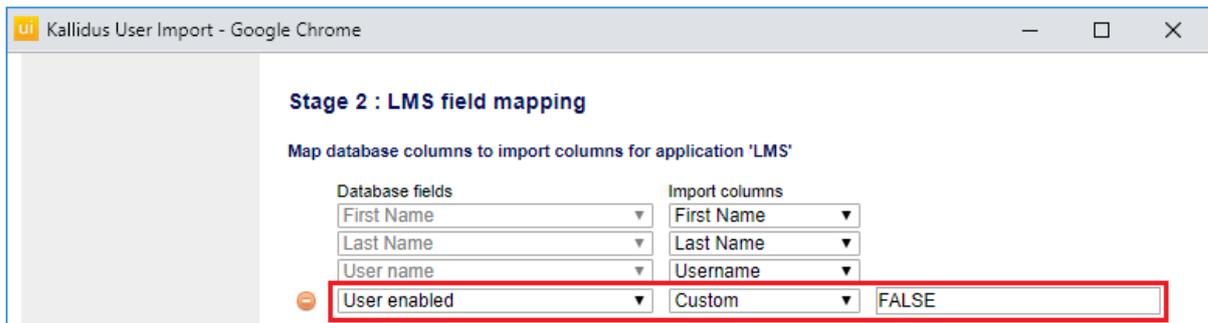
KIP can be used to update the enabled status for multiple Users – either when first imported or at a later time. In the below example, the Database field ‘User is enabled’ is linked to the option of ‘Custom’, and the text ‘FALSE’ is entered into the free text field.

When mapped in KIP and the LMS as in the below screenshots, this will unenable *all* Users in the import spreadsheet (to enable Users in bulk, enter ‘TRUE’ in the free text field).

KIP field mapping:



LMS field mapping:



Note: Unenabled Users will be removed from any Events to which they are assigned.



FAQ

I have SSO (Single Sign-On). Is this process different for me?

The process is the same. Take care to ensure that the Username specified is consistent with the SSO user identifier (unique field on your network). Check with your IT team to find out how Usernames are defined.

What emails are sent when a new User is added?

By default, the KIP email 'User created' will be sent. Please see the ['Configuring email communications' guide in the Help Centre](#) for more information about viewing and editing KIP email templates.

Can I add Users but not send emails?

The 'User Created' KIP email can be unenabled. However, KUI cannot trigger the notification at a later time.

Why don't I see the import button?

You don't have the correct permissions on your User profile. Speak to your admin team to see about getting your access upgraded to include the necessary permissions.

Can I map import columns more than once?

Yes. Import columns can be mapped more than once for the import process. However, database fields can be mapped only once.

Can I run multiple imports concurrently?

No. If there is already an import in progress when an administrator attempts to start an import, a message will be displayed explaining why a second import cannot be started

Can I specify a Group manager through import?

No. A Primary Group can be created, and Users can be assigned to that Group, but the import process cannot specify the manager of a Group.

What happens if a manually added User becomes a permanent employee?

The unique identifier for Users is the Import key. Therefore, if the import key for the manually added User matches the import key for the User added by the People Data Feed, then it will be assumed they are the same person. However, if the import key is not present in the manually added Users profile or if the import keys do not match, then a duplicate User will be created.

To avoid the creation of duplicate Users, we would recommend that the import key is updated to match the import key for the User in the HR system before they are added by the People Data Feed. If a duplicate is created, the training record for the manually added User can be copied to the new User (added by the People Data Feed) and the manually added User can be deleted.

What format should the import spreadsheet be?

Name the spreadsheet columns to match the corresponding fields in Learn. For KIP imports, that's Username, First name, Last name, Email address. Navigate to *System Configuration* / *User Information* to see the properties (including title) for User Information Fields. Alternatively, view the 'Information' section of any Users' profile.



