

Salesforce Usersync:

Steps for taking advantage of the Usersync feature.

If you do not have the Manage Integrations available through Brainshark's UI in Administration please reach out to your CSM or [support@brainshark.com](mailto:support@brainshark.com) to have it enabled.

Once this is enabled follow these steps.

1. Create a Report in Salesforce that contains these fields. (These are the required fields for the Usersync to work)
  - a) UserId
  - b) Active
  - c) Username
  - d) First Name
  - e) Last Name
  - f) Email
  - g) Last Modified (date/time value)
  - h) Profile (recommended but not required)
  
2. You can also add additional fields to the report that you use to populate in the user's fields in the Brainshark UI.

Example:

  - Title
  - Manager Username (The value must equal the Brainshark username and cannot be the standard Full Name value that Salesforce uses as a default)
  - Secondary Email
  - Department
  - Phone
  - Address1
  - Address2
  - City
  - State/Province
  - Country
  - Zip/Postal Code
  - Custom01-Custom10
  - Unique Company Identifier
  - Bio

Navigate to Brainshark Administration → Manage Integrations

If you do not see an existing Salesforce integration listed, click the Create New Integration Profile button to create a new integration profile.

If you do see an existing integration click on the actions menu and select edit.

If the fields are not populated, you will need to populate the fields:

Integration Type: Choose Salesforce using the dropdown.

Organization Type: Product or Sandbox from dropdown

Username: This is the Salesforce Username that we will use to run the report you built in Salesforce.

Note: The user must have permissions in Salesforce to run the report.

Password: This is the Salesforce password appended with that user's Salesforce security token.

Click Validate

For this Usersync feature you need to enable the Enable User Sync checkbox

#### Integration Profile

Integration Type*	Salesforce	▼
Organization Type*	Production	▼
Username*	syncuser@brainshark.com	🔗
Password*	*****	🔗
Description		🔗

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User Management  Enable User Sync [\(edit\)](#)

The other options on this page should not be changed as they do not pertain to this Usersync configuration

Data Sync Options	<input checked="" type="checkbox"/> Enable Brainshark Coaching Data Sync
	<input checked="" type="checkbox"/> Enable Learning Data Sync
	<input checked="" type="checkbox"/> Enable Integration Views Sync
Show Content options	<input checked="" type="radio"/> All Content
	<input type="radio"/> All Content excluding these folders <a href="#">(edit exclude list)</a>
	<input type="radio"/> Only content from these folders <a href="#">(edit include list)</a>
	<input checked="" type="checkbox"/> Exclude presentations that require a username and password
	<input type="radio"/> Use a Common Brainshark Account
	<input checked="" type="radio"/> Use a Unique Brainshark Account for each Salesforce User
	<small>Please enter the username and password of a Brainshark Administrator. This Brainshark Administrator account will use the single sign on registration feature to provide each user with a unique Brainshark account and automatically login to that account.</small>
	Username *
	Password *
Security Settings (Signon Mode)	Confirm Password *

Click the (edit) for the User Sync

Populate the report Id field with the report id from Salesforce

← → ↻ 🏠 dgasser-dev-ed.my.salesforce.com/0001J0000067wJi

Apps System Dashboard... AOL Mail Facebook SITE Brainshark Support... MyLeague Plus: Fun... Sha

**BRAINSHARK** Search... Search

Home Chatter Dashboards Contacts Leads **Reports** Brainshark Settings Brainshark Activities Brainshark Inte

 **BSK\_SFDC\_USERSYNC**

Report Generation Status: Complete

Map the fields Brainshark Fields are on the left and the Salesforce report fields will be on the right. Use the dropdown to map the fields and click apply when finished.

See example:

Edit ×

User Sync Configuration

Salesforce User Id*	User ID
Active*	Active <span style="float: right;">▼</span>
User Name*	Username <span style="float: right;">▼</span>
First Name*	First Name <span style="float: right;">▼</span>
Last Name*	Last Name <span style="float: right;">▼</span>
Primary Email*	Email <span style="float: right;">▼</span>
Last Modified Date*	Last Modified Date <span style="float: right;">▼</span>
Profile Name <span style="float: right;">▼</span>	Role <span style="float: right;">▼</span> <span style="color: red;">×</span>
Custom 06 <span style="float: right;">▼</span>	Title <span style="float: right;">▼</span> <span style="color: red;">×</span>

+ +

CANCEL
APPLY

For Usersync to function your Brainshark account must have at least one Self-Registration profile available. Administration → Manage Company → Advanced Options → Self Registration

If there are no profiles listed, then set the **Enable Self-Registration to YES**

Recommended settings:

**Require company name for Self-Registration= NO**

**Show Self-Registration link on login page= NO (unless you are using this feature)**

**Submit the page to have a Default Self Reg User created.**

If you want all users created through the Usersync to be created with the same set of permissions and group memberships, then you do not need to add additional user profiles to the list of templates.

Click on the USER, NEW user profile in the list of template and Click Edit Profile

Set the group memberships for the users that will be created based on this template user.

Brainshark recommends that you assign the permissions to folders via the groups instead of via the user permissions

Any enrollments you want to assign to new users must be done at the group level by enrolling the group in Courses/Curriculums. (Current and Future Members setting for the group enrollment)

If you want users to be created differently then you will need to create new template users with the appropriate group memberships for each variation.

In the Self-Registration template section, there is Profile Name field. This field is used to map the new users to the correct template. The value in this field will need to match the value of the field in the Salesforce that you are using for mapping to the templates.

Please note you do not need to use the Salesforce Profile Name field from the report. You can use any field in the report. We often have customers use the Role or Title field for mapping to the selfreg templates.

If the value of the field in the report does not match one of the values for the SelfReg templates "Profile Name" field, then that user will automatically get associated with the default SelfReg template.

When users are mapped to a self-reg template they will be added to all the groups that template user is a member of. If users are added to groups via the Usersync then if they change to a new SelfReg template (via the Profile Name field mapping), then they would be removed from the groups associated with the previous template and added to the groups associated with the new template.

If a user is added to groups outside of the Usersync via a manual action through the UI or via a User Bulk Upload file, or via the API then that user would not be removed from those groups.

The user sync occurs nightly at approx. 11pm Eastern.

If the date value of the field that is mapped to the Last Modified Date (Brainshark Field) is more recent than the date we have in our database for changes for that individual, then we will update the Brainshark user profile. Any of the Brainshark fields may be updated once we map the SFDC Userid to the Brainshark Userid if the value in the report changes.

**If you have any questions or need assistance, please do not hesitate to contact your CSM or [support@brainshark.com](mailto:support@brainshark.com)**