Technical Guidelines

myskillcamp

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User import

Three ways of proceeding

You can import users onto the myskillcamp platform in three different ways:

1. **Manual management through the myskillcamp user management screens.**
   - This method is very easy to use and allows you to administer your users online, within the application. The disadvantage of this approach is that the workload becomes significant as soon as you need to manage hundreds of users, or even small volumes but with quickly changing populations.

2. **Manual import of a list of users onto the platform.**
   - **Advantage**: this method accelerates the creation of a large number of users.
   - **How it works**: this way of working allows you to add users from an Excel file with a defined structure, with one line per user to be created. If a user already exists (for a certain email address provided), the line is ignored. When loading the file through the application, you determine (once for the whole file) the learning accesses to the different camps, as well as the branding. The advantage of this method is that you can access it directly in the application, in complete autonomy: "I organise" interface > "Users" > "Importing users". You can download a file with the structure of the Excel document to be respected and a few example lines (to be deleted before loading) at any time from that user import screen.
   - **Limitations**: this mechanism allows you to add users, but not to update or delete them. Only some information can be added: last name, first name, email address, language... but not the user's department, for instance.
     You cannot define a user's access or branding by mentioning it their line. For instance, if you want to apply different brandings according to the users' language, you have to upload several files (a separate file per language), and associate a branding to each file import.
     Finally, it is not possible to automate the registration for a course or learning path.

3. **Synchronisation with your customer relationship management system (CRM).**
   - **Advantages:**
     - Automation of the creation, update and deletion of users.
     - Automation of other aspects such as course registration, access to camps, creation of communities and customisation of user experience (i.e. the branding, the design of the platform).
     - Minimisation of human manipulations and guarantee of constant synchronisation of user data. User synchronisation can be carried out at your own pace (we recommend once a day, but it can also be done several times a day, once every other day, once a week, etc.).
   - **How it works** : synchronisation is based on the exchange of a file in a very free format, from your system to myskillcamp, through an sFTP server that myskillcamp generally makes available to you. Myskillcamp quickly develops a synchronisation script specific to your company. That script then processes the file and applies the rules we have agreed upon beforehand. You can ask your customer success manager

to update these rules at a later date. As this happens on request, please allow time for modifications to be made.

- You will find **more details** about this method further in this document.

These three methods can coexist: you can set up a synchronisation of your users with a CRM, a company directory or any other HR system, and manually manage some users who are not listed in that system (e.g. an external trainer, trainee or student).

Zoom on user synchronisation

Here are extra explanations on how to synchronise myskillcamp users with your user management reference system.

Firstly, there are two types of synchronisation:

- **The company synchronisation (also known as 'full' or 'swap all')**: in this case, every time you import your users, you should send us the complete list of all users who need access to the platform. Users who are not/no longer included in your synchronisation file will not/no longer have access to the platform. In other words, we remove access to the platform as soon as a user disappears from the file.
  - You can import your users several times a day on the sFTP server. Please note: the import files have a fixed title which includes the date of the synchronisation. If you import two files on the same day, for instance, your second import file will overwrite the first one. Only the users of the second import file will have access to the platform (and not the users of the first file).
  - How do the full synchronisation mode and manual additions of users to the platform coexist? If you send us the majority of your users in the synchronisation file, and you sometimes add users manually to the platform, there are two possibilities:
    - You never mention in the synchronisation file the users manually added on the platform. In this case, there is no issue, because our system is able to distinguish between manually added users and users who were added via the synchronisation file. If you wish to retrieve the access of manually added users, you have to do it manually on the platform.
    - If you mention (even just once) in the synchronisation file a user who was already added manually on the platform, you have to keep mentioning them in all future synchronisation files. They will lose access to the platform as soon as they are no longer mentioned in the synchronisation file.
  - In full mode, how does the system distinguish between learners, trainers and administrators? By default, all users who are synchronised via the server are considered as learners. You have two options if you want to assign additional roles to newly synchronised users:
    - After the synchronisation: manage the different roles (access to the 4 interfaces) manually on the platform in the "I organise" interface.

- - Before the synchronisation: send us synchronisation rules that will allow us to distinguish between these different roles and add the necessary columns in the synchronisation file.
- **The training organisation synchronisation (also known as 'delta' or 'flex sync')**: in this case, there is no automatic deletion of users who are not or no longer in the synchronisation file. In other words, you only need to send us the list of the new users who need to have access to the platform. We provide access to the new users you send us, not to all users.
  - You can import several user files a day on the sFTP server. Please note: your files must have a fixed title that includes the date of the synchronisation. If you import a first file today (with today's date in the title), this first series of users will be invited onto the platform. If you then proceed to a second import later today (still with today's date in the file title, so the second file will have the same name as the first one), your second set of users will also be invited to the platform. However, on the server, the file from the second import will 'overwrite' the first file (as the 2 files have the same name). To sum up: the users of the first and second series will all be invited to the platform, but you will no longer find any trace of the first file on the server (because the second file will have 'taken its place'). You will only find your second import on the server.
  - How do the delta synchronisation mode and manual additions of users to the platform coexist? You can synchronise some users on the server (e.g. your learners) and manually add other users on the platform (e.g. your administrators or trainers). This will not cause any problems in terms of access management.
  - In delta mode, how does the system distinguish between learners, trainers and administrators? By default, all users who are synchronised via the server are considered as learners. You have two options if you want to assign additional roles to newly synchronised users:
    - After the synchronisation: manage the different roles (access to the 4 interfaces) manually on the platform in the "I organise" interface.
    - Before the synchronisation: send us synchronisation rules that will allow us to distinguish between these different roles and add the necessary columns in the synchronisation file.

Could you please tell us which type of synchronisation suits you best?

Secondly, three types of information must be included in the file:
1. **A unique and permanent identifier for each user[1]**: a personnel number (e.g. 165428) or any other unique references.
2. **Essential information for a good user experience**: Surname, First name, email address, language (FR/EN/NL). Please write the first letters in capitals (e.g. Kevin Tillier). If all users are English-speaking, you do not necessarily need to add a "Language" column and you can just send us this information.

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[1] If you remove a user from the platform for some reason, and decide to give them access again to the platform a few months or years later, that user will get their account back ONLY IF they use the same unique identifier as when they first accessed the platform. If the user's unique identifier is different from the identifier used for the first access, they will have access to a new account and their learning history will be lost.

3. **Additional information you would like to see on each user's profile**: position, department, etc. The phone number is also a possibility, but is not advisable from a GDPR point of view.

Thirdly, we can organise your learner population based on access rules you send us. To do this, we would need two types of information:
1. **The required information to determine access** in your synchronisation file. This information is not necessarily added to the profile. Rules will be configured to give access to certain camps depending on the value of this information for a given user. It is also possible to configure rules to register for a course or learning path, register for a community, or associate a branding to a user.
2. **Precise user management rules** that you need to send to us. You will find a few examples below:
   - If users are part of the 'Marketing' department in the csv file, enroll them in the 'Marketing' camp on the platform.
   - Associate all users mentioned in the csv file with the 'Your company name - General' camp on the platform.
   - Associate the users in the csv file (column A) with the camp mentioned in column E

Please note:
   - The name of the camps and the information that determines user access must be spelled in the exact same way on the platform, in your synchronisation file and in the rules that you send us.
   - If some users are not included in any of your rules, they will be ignored by our system and will not have access to the platform at all.
   - Users with empty fields may also cause the synchronisation to fail. Please send us a correctly filled in synchronisation file to avoid any issue. If this is not possible, please send us the list of empty fields.

Fourthly, we can automate the registration of users to the platform for a limited period of time. This feature is not necessarily useful for company synchronisation ('full'). If you wish to use this feature, we would need the following information:
   - **Information related to access removal**. The only way to automate platform access removal is to mention a start date and an end date in your synchronization file. You can add two columns in your synchronisation file: 'start date of access' and 'end date of access', with the dates in the following format: DD/MM/YYYY. If this is not possible for you, you can send us a 'start date of access' column AND send us an 'end of access' calculation rule (e.g. start date of access + 30 days). If no end of access date is mentioned in the file and no calculation rule is communicated to us, the user will have unlimited access to the platform. (You can also remove access manually in myskillcamp, but this takes time if the number of users involved is high. In this case, the account will only be reactivated when you register again).
   - **Information related to guided onboarding**[2], if this is a step you wish to impose on your learners. Concretely, we would need information related to the registration to a course or

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[2] This *guided onboarding* option only works via the import of users on the sFTP that we make available to you. It does not work when adding users manually onto the platform.

learning path that you would like to make compulsory before giving access to the rest of the training, i.e. the reference of the session to which the learner must be registered (reference that you must also fill in manually in myskillcamp in the session involved). Please note that your synchronisation file must contain one line per learner's registration for a content (so two lines if the same learner registers for two contents). In concrete terms :

- <u>For a course you created yourself</u>: you will need to send us a column 'reference to the course session in myskillcamp', and fill in this column with the reference to the course session that you manually filled in myskillcamp. Here is the location of this reference feature in myskillcamp: 'I create' interface > 'My sessions' tab > select the session you are interested in and click on the '...' on the right of the screen > 'Edit' > 'Advanced settings' > fill in the 'Reference' field (see image below).
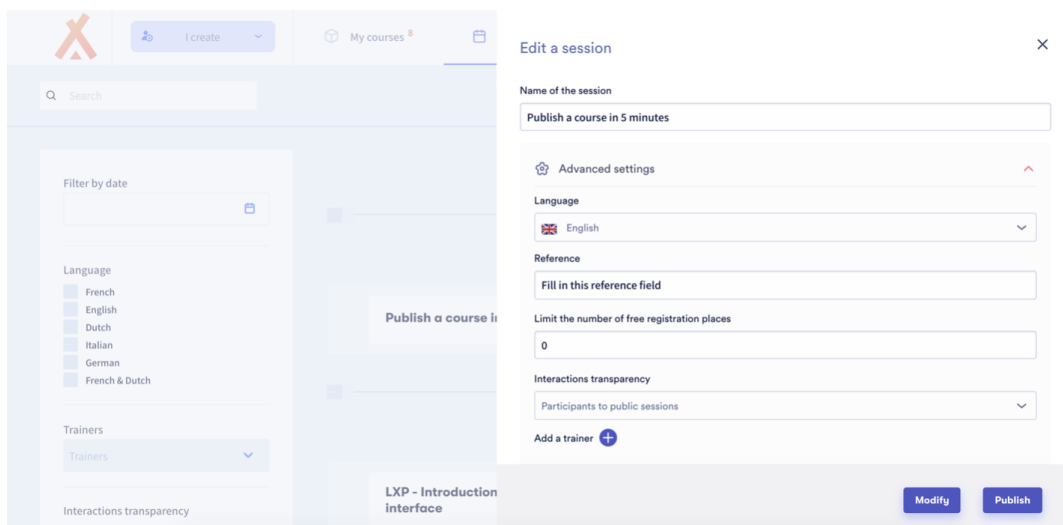
- <u>For a learning path or content from an external provider</u>: you will have to send us a column 'reference to the course session in myskillcamp', and fill in this column with the reference to the session of the learning path or external content that you manually filled in in myskillcamp. You will also need to send us a 'title of the learning path or external content' column and fill it in with a reference that you will give yourself (e.g. this can be the title of the learning path or external content).
  - Please note: in the case of a learning path, if the courses that make up the learning path have more than one session, an algorithm will be run to enroll users as follows:
    - *Ignore all the sessions deleted, or full, or started already (at least one event started before today)*
    - *Pick the remaining session. If there are several remaining sessions:*
      - *If there are remaining sessions with an event, automatically subscribe the user to the session which is the closest to start*
      - *Otherwise, pick the first remaining session that was created*

> You can find an example of a synchronisation file [by clicking here](#).

Fifthly, we would need to know **when and how to invite users to join the platform**, once they are synchronised:

- Should we send them an invitation email[3] with a link to the platform? If so, can we send them our standard email, or do you want to customise the body of the email? (For the time being, it is not possible to customise other parts of the email). If you wish to personalise the body of the invitation email, please send us the text we should put in the email (in a multilingual version if necessary, as we do not adapt the text according to the user's language). In case of multilingual text, please separate and indicate the different languages in your email by using mentions such as 'For English version, see below'). HTML formatting is allowed.
- Would you prefer to send them a communication yourself? In this case, we do not send any invitation email to the users.

Then, here are some explanations on **the format** of the synchronisation file:

- **Preferred file format[4]**: Excel or text file with separator (CSV).
- If you use a CSV file, please always use **the same separators** (either always commas or always semicolons).
- **The alphabet encoding** must be specified: UTF-8 is ideal but not compulsory (ISO-8859-x, WIN-1252).
- **The order and names of the columns**: the standard format is to start with the unique identifier and the essential information (name, first name, email and language). You can choose the order of the other columns. The names of the columns should be in the first row. Column names should be in the first row.
- Please **do not send data about users who should not have access to the platform** (this is not recommended from a GDPR perspective).

Lastly, you will find below some information on the transmission of this synchronisation file:

- **The file is shared via an sFTP server** that we will make available to you (we will send you more information once the server is ready). We take care of the first file upload to make sure everything runs smoothly. We also impose a file name mentioning the date and time of synchronisation. On your side, you will have to download FileZilla to be able to access this server and upload your synchronisation files on it (you will be responsible for this task from the second user import on).

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[3] At the moment, the invitation email is the only customisable email.
[4] Other file formats can be used if required.