

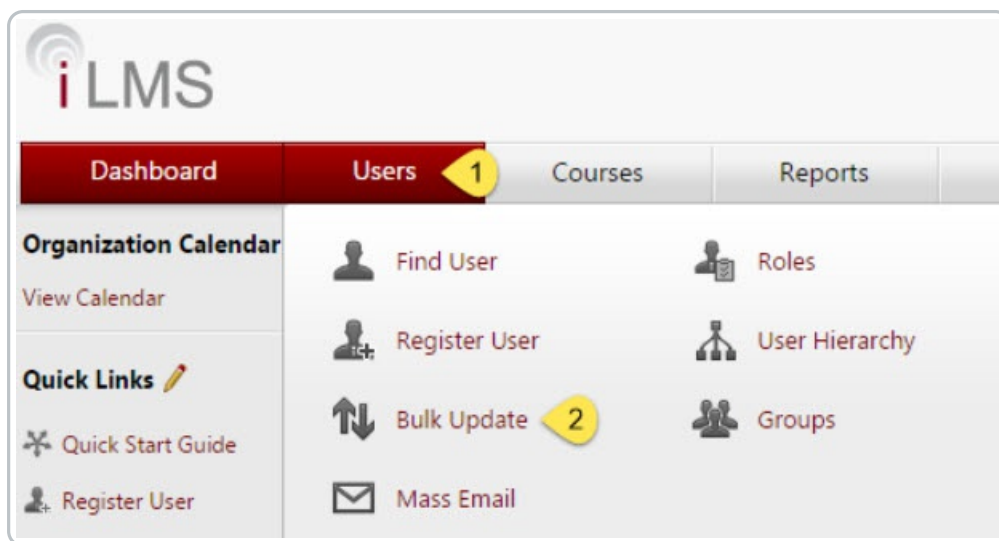
Automated User Bulk Update (CSV)

Last Modified on 03/18/2021 11:26 am CDT

Automatic Bulk Update allows you to use an FTP, FTP+SSH (SFTP), or FTP+SSL (FTPS) connection to automatically download bulk update spreadsheets from your FTP server and have the iLMS process them.

As opposed to the 5,000 user limit in the manual Bulk Update process, up to 20,001 users can be updated through the Automatic Bulk Update process at one time.

1. To access the Automatic Bulk Update in your Admin Portal, navigate to the Users tab
2. Select "**Bulk Update**" from the menu



3. Once in the bulk update menu, click on the automatic tab.


Manual
Automatic
3

Automatic Bulk Update

☐ Enable Automatic Bulk Updates

FTP Details and Schedule

The iLMS checks for new files on your FTP server based on the credentials and schedule below.

FTP Settings [ Save & Check Connection]

FTP Type

☒ FTP+SSL
☐ FTP+SSH
☐ FTP

Host Name *

Port *

990

FTP Mode

Passive Mode

Remote Directory

☐ Anonymous Login

Username *

Password *

Download and Execute File Order

Time Stamp

Descending

☐ Use PGP to Decrypt File

Proxy Settings

☐ Use Proxy

FTP + SSL Settings

Certificate

Choose File

No file chosen

Password

Security *

Implicit TLS or SSL

Allowed Protocols

☐ TLS 1.0
☐ SSL 3.0

☐ Clear Command Channel

Descriptions for each field on the settings form are listed below:

Enable Automatic Bulk Updates

Check this box to turn on the automatic bulk update process.

FTP Details and Schedule

Below, you will enter the details for your FTP server, such as credentials and connection type.

Save Check Connection

After entering your FTP server details, you may use this to test the connection and ensure it is functioning properly.

FTP Type

Here you may choose FTP+SSL (FTPS) or FTP+SSH (SFTP)

Note: Plain FTP is no longer supported. Connection must use SFTP or FTPS connection.

Choosing any of the radio buttons will change which options are available to you below this section.

Host Name

The address for your FTP server

(either a DNS address, such as myftp.mycompany.com or a publically available IP address.)

Port the FTP port to which your FTP server is set to bind.

FTP Mode

You may select Active or Passive, depending on your server configuration.

Remote Directory

The directory that contains your spreadsheet files, with / being the default root directory.

Anonymous Login

Check this if your server allows, and you wish to use, an anonymous FTP login.

Username

Specify the FTP user here.

Password

Specify the FTP users password here.

Download and Execute File Order

Choose to sort by File Name or Time Stamp, either in Ascending or Descending order if your FTP directory has multiple spreadsheets present.

Use PGP to Decrypt File

If you have PGP configured, you may select this box to use your previously configured PGP settings to decrypt the PGP-encrypted spreadsheet files.

Use Proxy

Checking this box will allow you to use a proxy server to connect to the FTP server.

Proxy Settings	
<input checked="" type="checkbox"/> Use Proxy	
Proxy Name *	Port *
Proxy Type *	
Username *	Password *

Proxy Name

The DNS name or IP address for your proxy server. Port The port that is configured for your proxy server.

Proxy Type

You may choose either Socks4, Socks4a, Socks5, HttpConnect, FtpSite, FtpUser, or FtpOpen.

Username (under proxy if "User Proxy" enabled)

The username to authenticate to your proxy server.

Password (under proxy if "User Proxy" enabled)

The password for the user to authenticate to your proxy server.

FTP+SSL/SSH settings



The screenshot shows a dialog box titled "FTP + SSL Settings". It contains several fields and options: a "Certificate" field with a "Choose File" button and "No file chosen" text; a "Password" field; a "Security" dropdown menu set to "Implicit TLS or SSL"; "Allowed Protocols" with checkboxes for "TLS 1.0" and "SSL 3.0"; and a checkbox for "Clear Command Channel".

If you are using **FTP+SSL (FTPS)**, you must upload the SSL certificate for your FTP server and optionally provide its password.

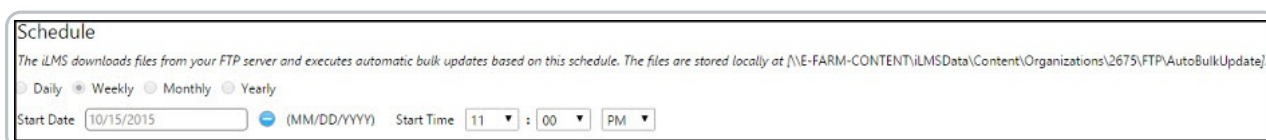
You may select either Implicit or Explicit TLS or SSL as a security method, and may optionally define which TLS or SSL protocols are allowed. You may also choose whether to use the Clear Command Channel command for the iLMSs FTP client connection.

If you are using **FTP+SSH (SFTP)**, you must upload the private SSH key used for your server and optionally provide the password used.

If you use plain **FTP**, no further configuration is necessary.

Schedule

Here you may set the schedule that the iLMS retrieves your spreadsheets: daily, weekly, monthly, or yearly.



The screenshot shows a dialog box titled "Schedule". It contains a description: "The iLMS downloads files from your FTP server and executes automatic bulk updates based on this schedule. The files are stored locally at \\E-FARM-CONTENT\\iLMSData\\Content\\Organizations\\2675\\FTP\\AutoBulkUpdate\\". Below this are radio buttons for "Daily", "Weekly" (selected), "Monthly", and "Yearly". At the bottom, there is a "Start Date" field with the value "10/15/2015" and a calendar icon, followed by "(MM/DD/YYYY)", and a "Start Time" field with "11", ":", "00", and "PM" dropdowns.

The Start Date and Start Time specify the first run for the schedule; it will continue to run at the same time according to the time-frame set above.

Settings

For each user record in the bulk update spreadsheets, you may specify the following options:

Settings

Send Registration Email to Users

☐ New Users
☐ Existing Active Users

User Must Change Password At Next Login

☐ New Users
☐ Existing Active Users
☐ Existing Inactive Users

Create unrecognized Regions, Divisions and Departments

☐

Update Blank Values for Non Mandatory Fields in User Profile

☐

- If a registration email is to be sent to New or Existing users
- Require that users change their password upon next login
- Create unrecognized (new) regions, divisions, and departments specified in the spreadsheets
- Whether a blank value in a non-mandatory fields will overwrite information in that field in the users profile (The default setting is to not modify values in the spreadsheet that are blank.)

Notifications

Here you may choose whether to notify the primary organization administrator of each bulk update and optionally CC other recipients on the emails.

Notifications

[Edit Notification Template](#)

☒ Notify the primary organization admin at each automatic bulk update.

☐ Also Notify

To enter more than one email address separate them using a comma.

CSV Format

Choose whether to use the default CSV upload template to match the spreadsheets being uploaded or convert your spreadsheets into a format readable by the iLMS. You may click Download Template to see the standard iLMS upload template.

CSV Format

☒ Uploaded files are in the iLMS Bulk Update standard format.
[Download Template](#)

☐ Uploaded files must be converted to the iLMS Bulk Update standard format.

If you pick the latter option, you must map the fields 1:1 from your spreadsheet to the iLMS built-in fields and specify the column number.

Ensure that the names match identically; for instance, if your First Name* column is the same as the default templates First Name*, you must also include the asterisk.

See the Mapping details below:

CSV Format

● Uploaded files are in the iLMS Bulk Update standard format. [Download Template](#)

● Uploaded files must be converted to the iLMS Bulk Update standard format.

Mapping

iLMS Field	Foreign Field Name	Foreign Field Column #
First Name *	<input type="text"/>	<input type="text"/>
Middle Name	<input type="text"/>	<input type="text"/>
Last Name *	<input type="text"/>	<input type="text"/>
Employee ID	<input type="text"/>	<input type="text"/>
Hire Date	<input type="text"/>	<input type="text"/>
Address 1	<input type="text"/>	<input type="text"/>
Address 2	<input type="text"/>	<input type="text"/>
City	<input type="text"/>	<input type="text"/>
Country	<input type="text"/>	<input type="text"/>
State (US or Canada)	<input type="text"/>	<input type="text"/>
State/Province/Region(Non US or Canadian)	<input type="text"/>	<input type="text"/>
Zip Code/Postal Code	<input type="text"/>	<input type="text"/>
Time Zone	<input type="text"/>	<input type="text"/>
Email ID *	<input type="text"/>	<input type="text"/>
Password *	<input type="text"/>	<input type="text"/>
Phone	<input type="text"/>	<input type="text"/>
Fax	<input type="text"/>	<input type="text"/>
Company/Employer	<input type="text"/>	<input type="text"/>
Job Title	<input type="text"/>	<input type="text"/>
Supervisor Name	<input type="text"/>	<input type="text"/>
Supervisor Email	<input type="text"/>	<input type="text"/>
Region *	<input type="text"/>	<input type="text"/>
Division *	<input type="text"/>	<input type="text"/>
Department *	<input type="text"/>	<input type="text"/>
User Language	<input type="text"/>	<input type="text"/>
New Email ID	<input type="text"/>	<input type="text"/>
New Employee ID	<input type="text"/>	<input type="text"/>
Custom Field 1	<input type="text"/>	<input type="text"/>
Custom Field 2	<input type="text"/>	<input type="text"/>
Custom Field 3	<input type="text"/>	<input type="text"/>
Custom Field 4	<input type="text"/>	<input type="text"/>
Action	<input type="text"/>	<input type="text"/>

Save

For more information on available fields, character limits, restrictions, and formats see the articles below:

[iLMS Profile Fields and Required Formats for Bulk Update](#)

[Region, Time, and Language Codes](#)