

# Batch Deactivation of Users in SuccessFactors LMS

# Background

- This process was used specifically to deactivate all users in the HSCTC domain that did not have an email address.
- Users could not be searched for by email in our instance of the database. If we can work with SuccessFactors to add searches by user emails, this process will be greatly simplified.
- Also, we can only export 2,000 users at a time. If we can change this limitation, the process could be greatly simplified also.

# Download User template

The screenshot shows a web application interface with a top navigation bar labeled 'Admin'. Below it are two tabs: 'Commerce' and 'System Admin'. A search bar with a 'Go' button is present. The left sidebar contains a menu with categories like 'Application Admin', 'Security', 'Automatic Processes', 'Connectors', 'Configuration', and 'Custom Columns'. The 'Tools' category is expanded, showing options such as 'Admin Passwords', 'Attachments Utilization', 'Direct Link', 'Label Import/Export', 'Learning Event Synchronization', and 'Import Data'. The main content area is titled 'Import Data' and includes a 'Help' link. It contains a form with the following fields:

- Action:** Radio buttons for 'Import Data' and 'Download Template' (selected).
- Record Type:** A dropdown menu with 'User' selected.
- Submit:** A button highlighted with a red box.

Below the form is an 'Import Results' section with a table header and pagination controls. The table has columns for 'Import ID', 'Date/Time', 'Job Description', 'Job Status', 'Error Log', and 'Delete'. The pagination shows 'Page 1 of 3' and '28 total records'.

# Downloading User template (cont.)

- After clicking Submit on previous screen, save the “EntityTemplate\_User.xlsx” file onto your computer.
- Create 26 copies of this file, one for each letter of alphabet, and rename:
  - EntityTemplate\_User\_A.xlsx
  - EntityTemplate\_User\_B.xlsx
  - Etc.
- There are three columns marked as “(\*required)”:
  - Active
  - Role
  - Domain ID
- When editing “EntityTemplate\_User.xlsx” and reimporting into LMS, those three columns, **as well as the User ID column**, will all need data.

# Export Users

Home Organization **Admin**

Users Performance Learning Content Commerce System Admin

Search:

marks Recents

- Folder
- Users
- My Bookmarks
- Courses
- Offerings

**Users**

- Assignment Profiles
- Event Rules
- Job Codes
- Job Families
- Positions
- Organizations
- Organization Groups
- Regions
- Tools
- Account Requests
- Groups

**Users** Search | Add New |

Search > Search Results Saved Searches

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

**Case sensitive search:**  Yes  No

**User ID:** Starts With

**External ID:** Starts With

**Last Name:** Starts With

**First Name:** Starts With

**Middle Initial:** Starts With

**Role ID:** Starts With

**User Status:**  Active  Not Active  Both

**Profile Status:**  Active  Expired  Both

**Domains:** Starts With

**Job Codes:** Starts With

**Position ID:** Starts With

**Native Deeplink User:**  Yes  No  Both

**Gamification User ID:** Starts With

**Add/Remove Criteria**

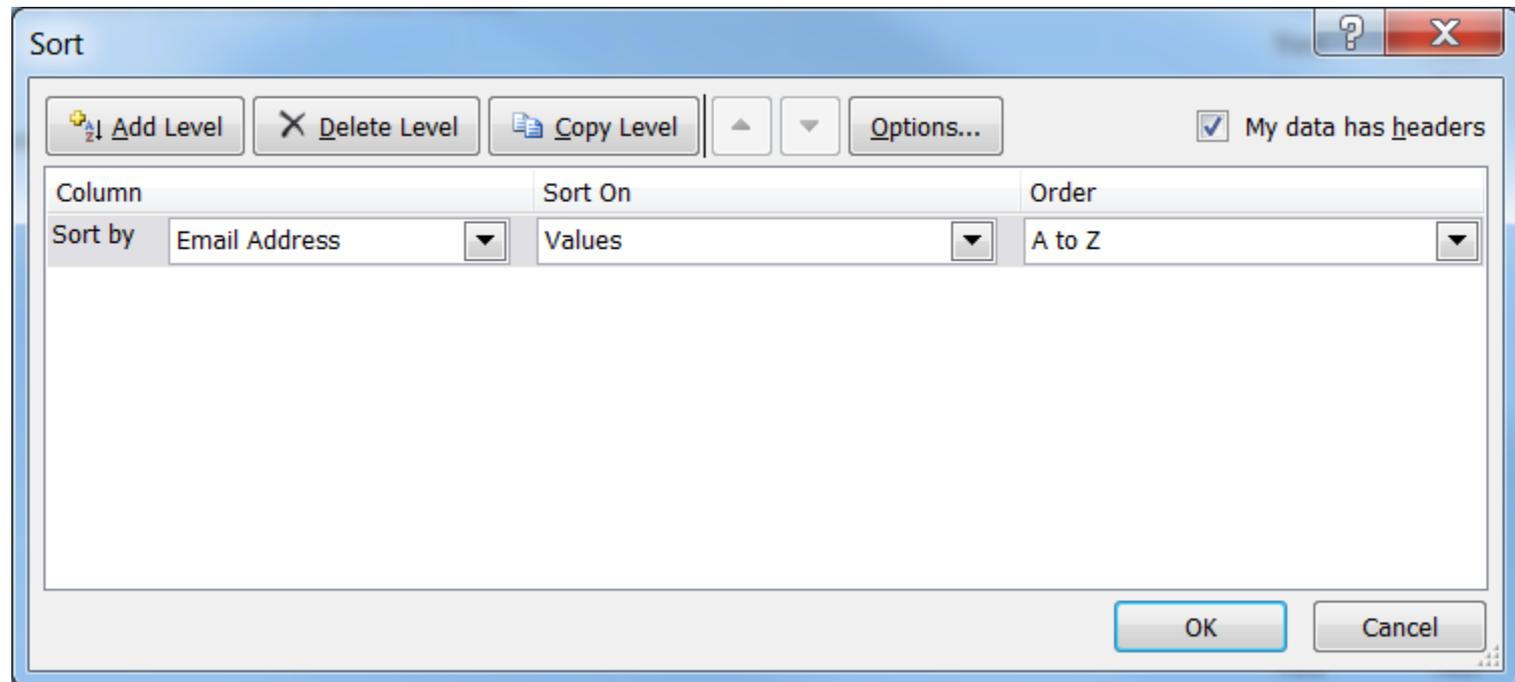
**Field Chooser**

# Export Users (cont.)

- Due to LMS limitations, export users in 26 groups, grouped by first letter of last name. Each group should have its own csv file called “SearchResult\_Student.csv” with the letter included in file name, such as “SearchResult\_Student\_A.csv”.
- Each csv file is then opened and saved as a .xlsx file .
- When you have 26 .xlsx files, you are ready for next step.
  - SearchResult\_Student\_A.xlsx
  - SearchResult\_Student\_B.xlsx
  - Etc.

# Sort User files and delete Users

- Open a User .xlsx file, for example “SearchResult\_Student\_A.xlsx” .
- Sort the spreadsheet by email address (see image below).
- Once you have the users sorted by email, select the users ***with*** email and delete them (see image on next screen). The goal is to be left only with users that don’t have an email address.



# Delete Users, Save File

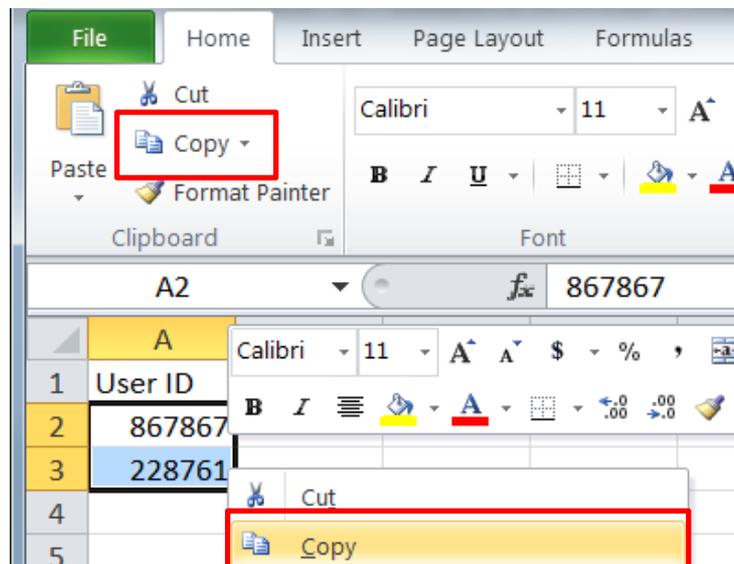
Select and Delete users by right clicking on selection and choosing "Delete." Save file.

The screenshot shows the Microsoft Excel interface with a spreadsheet titled "SearchResult\_Student\_Sample.xlsx". The spreadsheet contains a list of users with columns for ID, Name, Organization, Address, and Email. A right-click context menu is open over a selection of cells, with the "Delete" option highlighted. A red box highlights a column of email addresses, and a red arrow points to the text "Email addresses" below the spreadsheet.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	
69	145341					HSCTC		JINDAL, SA	Yes	ENGG/AOI mumbai	maharastr		400029	IND				sandeep.jindal@airindia.in	Yes	No		
70	122288					HSCTC		Jofuku, Sc	Yes	P.O. Box 3 Seattle	WA		98124	USA				scott.m.jofuku@boeing.com	Yes	No		
71	1088902					HSCTC	HSCTC827	Jones, She	Yes	5025 Brad Huntsville	AL		35805	USA				sherman.jones@sikorsky.com	Yes	No		
72	2018881					HSCTC	CYIENT	Jhawar, Sh	Yes	20-145/1, Mahubna	Telangana		509301	IND				Shriram.Jhawar@cyient.com	Yes	No		
73	120566					HSCTC		Johnson, S	Yes	1483 Goul Cookeville	TN		38506	USA				Sjohnson@flexial.com	Yes	No		
74	1705863					HSCTC		Jamieson, Yes		1 Dow Ave Prestwick	South Ayr	KA9 2SA						stuart.jamieson@utas.utc.com	Yes	No		
75	153421					HSCTC	HSCTC114	Jalal, Tariq	Yes	1714, pl. d laval	quebec		h7t1k6					tariq.jalal@aircanada.ca	Yes	No		
76	141181					HSCTC		Jeevanant	Yes	NO.9, Leng Klang	Selangor		41200	MYS				thamarajan.jeevananthan@hs.utc.com	Yes	No		
77	149741					HSCTC	HSCTC114	johnpulle, Yes		4785 bluef mississaug	ontario		L5R 0c8					valentine.johnpulle@aircanada.ca	Yes	No		
78	186461					HSCTC		Johansen, Yes		1 Hamiltor Windsor	LI CT							victoria.johansen@hs.utc.com	Yes	No		
79	125742					HSCTC		Janushevsl	Yes	Rodunios r Vilnius	Vilnius		LT-02188					viktor.janushevskij@fltechnics.com	Yes	No		
80	149981					HSCTC	HSCTC114	Jaitly, Vinc	Yes	12 Willow Brampton	Ontario		L6R 2S3					vinod.jaitly@aircanada.ca	Yes	No		
81	147561					HSCTC	HSCTC100	Jia, Micha	Yes	Melalian Air Haikou	Hainan		570126					wd_jia@hnair.com	Yes	No		
82	144321					HSCTC		Jurado, Yu	Yes	Av. Fuerza Mexico Cit	Venustiano		15700					yjurado@aeromexico.com.mx	Yes	No		
83	2151871					HSCTC	HSCTC967	Jankovsky, Yes		450 W. Hamilton Ave. Suite 171,	Peterson A							zachary.jankovsky@us.af.mil	Yes	No		
84	1575869					HSCTC		Johnson, Z	Yes	850 Lagoo Chula Vista	CA		91910					zane.johnson@utas.utc.com	Yes	No		
85	150661					HSCTC	HSCTC100	jing, zeng	Yes	mailan airq haikou	hainan		570200					zengjing@hnair.com	Yes	No		
86	1179872					HSCTC		Pratt Jackson, A	Yes											Yes	No	
87	231261					HSCTC	HSCTC959	Jackson, R	Yes											Yes	No	
88	858862					HSCTC	HSCTC113	Jaiiae, Wi	Yes											Yes	No	
89	1499866					HSCTC	HSCTC959	Jammer, E	Yes											Yes	No	
90	718862					HSCTC		Janssen, G	Yes											Yes	No	
91	128301					HSCTC	HSCTC824	Jansson, C	Yes											Yes	No	
92	843863					HSCTC	HSCTC113	Jareonkij, I	Yes											Yes	No	
93	2224888					HSCTC	HSCTC102	Jasni, Nur	Yes											Yes	No	
94	965876					HSCTC	HSCTC516	Jayawarde	Yes											Yes	No	
95	861862					HSCTC	HSCTC113	Jeen-im, D	Yes											Yes	No	
96	137662					HSCTC	HSCTC828	Jennings, E	Yes											Yes	No	
97	147143					HSCTC	HSCTC100	Ji, Shengxi	Yes											Yes	No	
98	147165					HSCTC	HSCTC100	Jiang, Quai	Yes											Yes	No	
99	805869					HSCTC	HSCTC100	Jiang, Quai	Yes											Yes	No	
100	126524					HSCTC	COMAC	Jin, Tie jiar	Yes					CHN						Yes	No	
101	230161					HSCTC		Job, Patric	Yes											Yes	No	
102	174861					HSCTC	HSCTC517	Johansson	Yes											Yes	No	

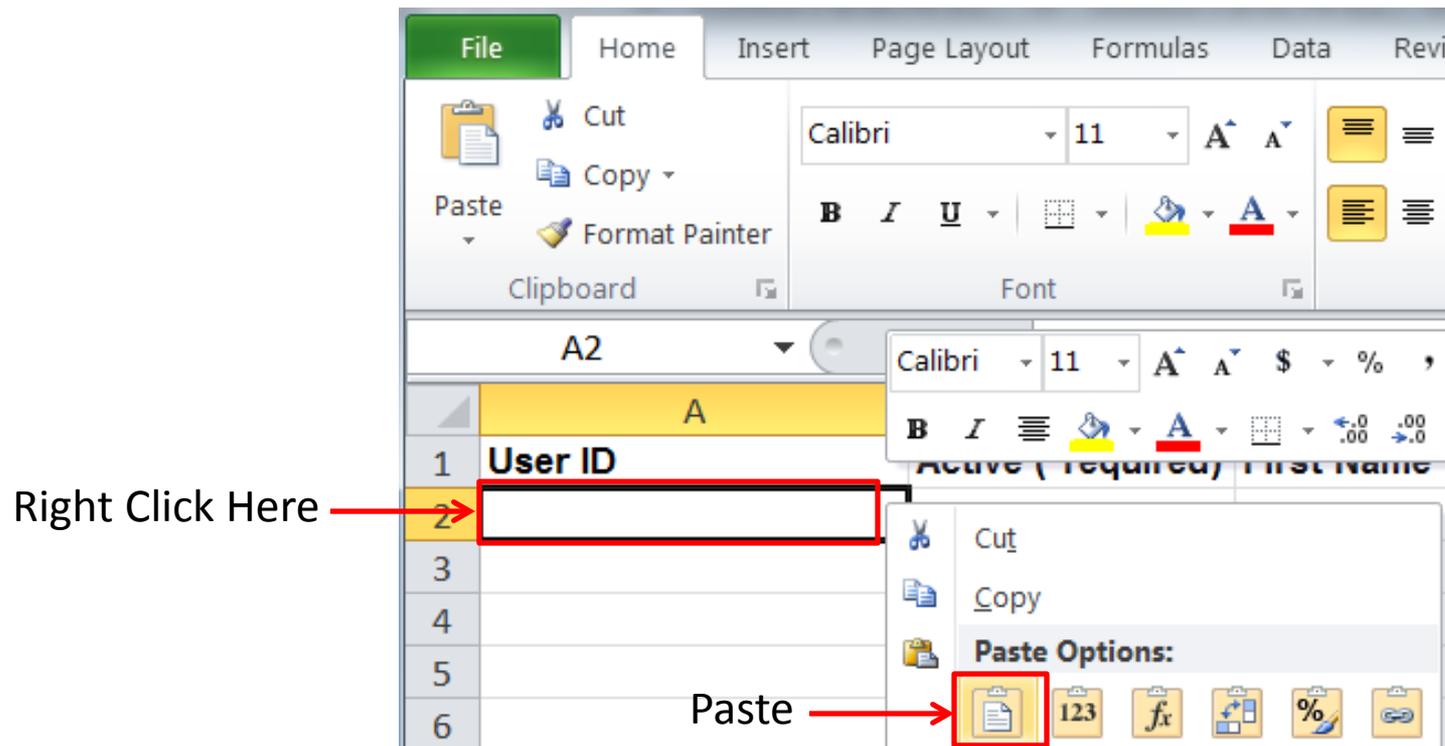
# Merge User ID

- It is recommended to merge data one letter at a time.
- Open the “SearchResult\_Student\_A.xlsx” file created on Slide 6 when exporting Search results from LMS.
- Open the corresponding “EntityTemplate\_User\_A.xlsx” file created on Slide 4.
- In “SearchResult\_Student\_A.xlsx” , select and then copy ALL the user IDs, without the header (row 1). There are three different ways to copy your selection:
  1. Using the keyboard, press “ctrl” and “C” keys at same time.
  2. Right click on selection and choose “Copy” (see image below)
  3. Choose Copy from the Home menu in Excel (see image below)



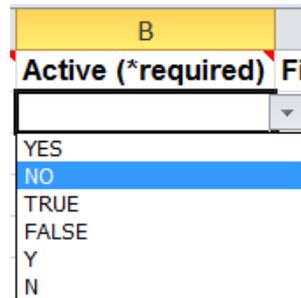
# Merge User ID (cont.)

- After selecting and copying data on previous screen, go to “EntityTemplate\_User\_A.xlsx” file and paste the User IDs into column A (User ID).
- I recommend right clicking in the first cell under the User ID header and selecting the paste option, as shown below.



# Change Active to “No”

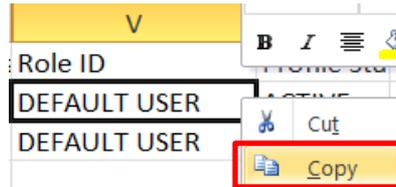
- In the “EntityTemplate\_User\_A.xlsx” file, change “Active (\*required)” column for the first row to “No” using the pulldown menu. You do not have to remove the “(\*required)” text from heading.



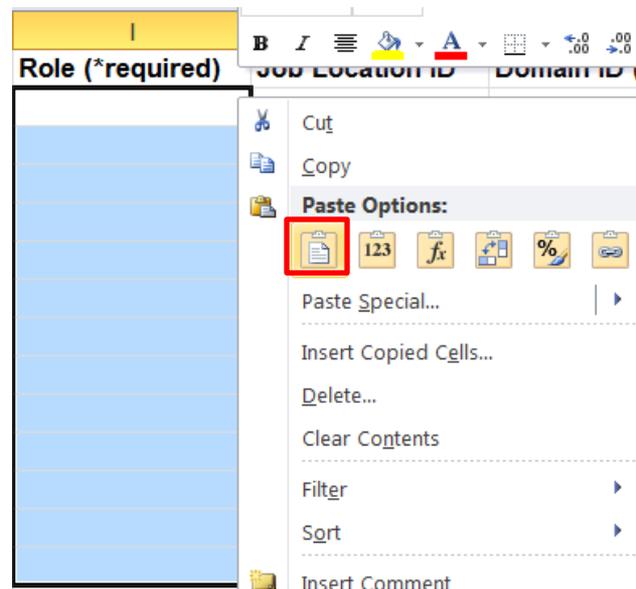
- You can then select the cell and copy.
- Select all the remaining rows for the Active column and paste.
- You should now have “No” in each row that has a User ID.

# Merge Role

- If the Roles are all the same for the users currently being updated, you can select and copy the value of first row of “Role ID” column in “SearchResult\_Student\_A.xlsx” .



- Then select all rows in “Role (\*required)” column of “EntityTemplate\_User\_A.xlsx”.
- Right click in selection area and paste. All rows will now show value from step 1 above.



# Merge Role (cont.)

- If the Roles are NOT the same for the users currently being updated, using the instructions for merging User ID shown on “Merge User ID” slides (9 & 10):
  - Copy the entire “Role ID” column in “SearchResult\_Student\_A.xlsx”
  - Paste into “Role (\*required)” column of “EntityTemplate\_User\_A.xlsx”.

# Merge Domain

- Using the Domain ID column, follow the directions for merging roles shown on “Merge Role” screens (12 & 13).

# Importing Data

- After merging the data from the exported “SearchResult\_Student” files into the corresponding “EntityTemplate\_User” files for each letter, import the “EntityTemplate\_User” files into the LMS using the exact settings shown below.

The screenshot shows the LMS Admin interface. The top navigation bar includes 'Organization' and 'Admin' tabs. Below the navigation bar, there are icons for 'Commerce' and 'System Admin'. A search bar with a 'Go' button is present. On the left, a sidebar menu lists various administrative functions, with 'Tools' highlighted. The main content area displays the 'Import Data' form. The form includes a breadcrumb trail '> Import Data', a title 'Import Data', and a note: 'Data provided must be in the format specified in the template.' Below this, a legend indicates '\* = Required Fields'. The form fields are: 'Action' (radio button selected for 'Import Data'), 'Record Type' (dropdown menu set to 'User'), 'Import Option' (dropdown menu set to 'Update'), 'Import File' (text input with 'EntityTemplate\_User\_A.xlsx' and a 'Browse...' button), and 'Time Zone ID' (dropdown menu set to 'Eastern Standard Time (America/New York)'). A 'Submit' button is at the bottom right. Red arrows and boxes highlight these specific settings and the submit button.

Organization Admin

Commerce System Admin

Go ▶

Application Admin

Security

Automatic Processes

Connectors

Configuration

Custom Columns

**Tools**

- Admin Passwords
- Attachments Utilization
- Direct Link
- Label Import/Export
- Learning Event Synchronization
- Import Data
- Export Data
- AICC Import
- Legacy SCORM Import
- Offline Player Installer
- Download Connector Template
- Manage Unsent Emails

*Import Data* Help

> Import Data

**Import Data**

Data provided must be in the format specified in the template.

\* = Required Fields

\* **Action:**  Import Data  Download Template Select Import Data

\* **Record Type:** User Set to User

\* **Import Option:** Update Set to Update

\* **Import File:** Imported Entity Templates EntityTemplate\_User\_A.xlsx Browse...

\* **Time Zone ID:** Eastern Standard Time (America/New York) Leave at Default

Click Submit Submit

# Importing Data (cont.)

- After clicking Submit on previous screen, you will be taken to screen below.
- Select “Run this job immediately, if allowable”
- Job Description is optional.
- Click “Finish”.

The screenshot shows a web application interface for 'Admin' with a 'System Admin' role. The main content area is titled 'Import Data' and contains a 'Schedule Background Job' form. The form includes a warning message, two radio button options for scheduling, date and time input fields, a time zone dropdown, a job description text area, a checked checkbox for email notifications, and an email address field. A red arrow points to the 'Run this job immediately, if allowable' option, and another red arrow points to the 'Finish' button at the bottom right.

**Admin**  
Commerce System Admin

**Import Data**  
> Schedule Background Job

**Schedule Background Job**

The action you are trying to perform is affecting too many records and could take a long time to complete. This action must be scheduled to run in the background. Please complete the following information if you want this action to run at a specific date and time. If you choose to be notified by email upon completion, please select "Notify via email upon completion" checkbox and specify an email address.

Run this job immediately, if allowable. **Select This**

Schedule this job to be executed on: [View Available Time Slots](#)

Date:   
(MM/DD/YYYY)

Time:   
(hh:mm AM/PM)

Time Zone:

Job Description:

**Notify via email upon completion**

Email:

Click Finish **Finish**

# Importing Data (cont.)

- The system will check the file to make sure it is ok
- If file is ok, system will start the process to import the data.
- When it completes you will get the Import Results.
- If a single record fails the job will be listed as failed. Download the error log. It will be a copy of the load file but will only contain those rows that did not load. In the far right column you will find the reason it did not load.
- If Import is successful, repeat for each letter.