Batch Deactivation of Users in SuccessFactors LMS

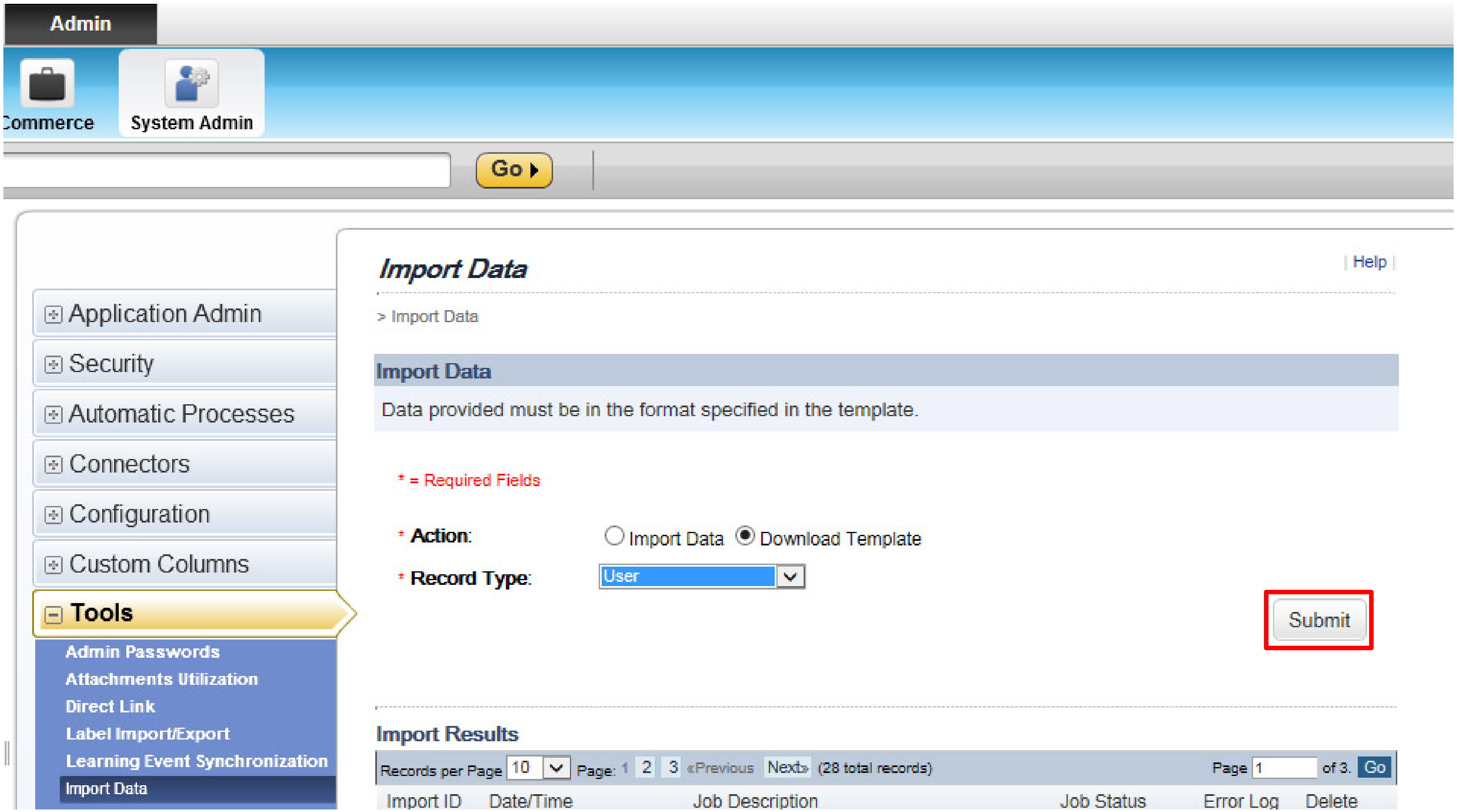
Background

- 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



Downloading User template (cont.)

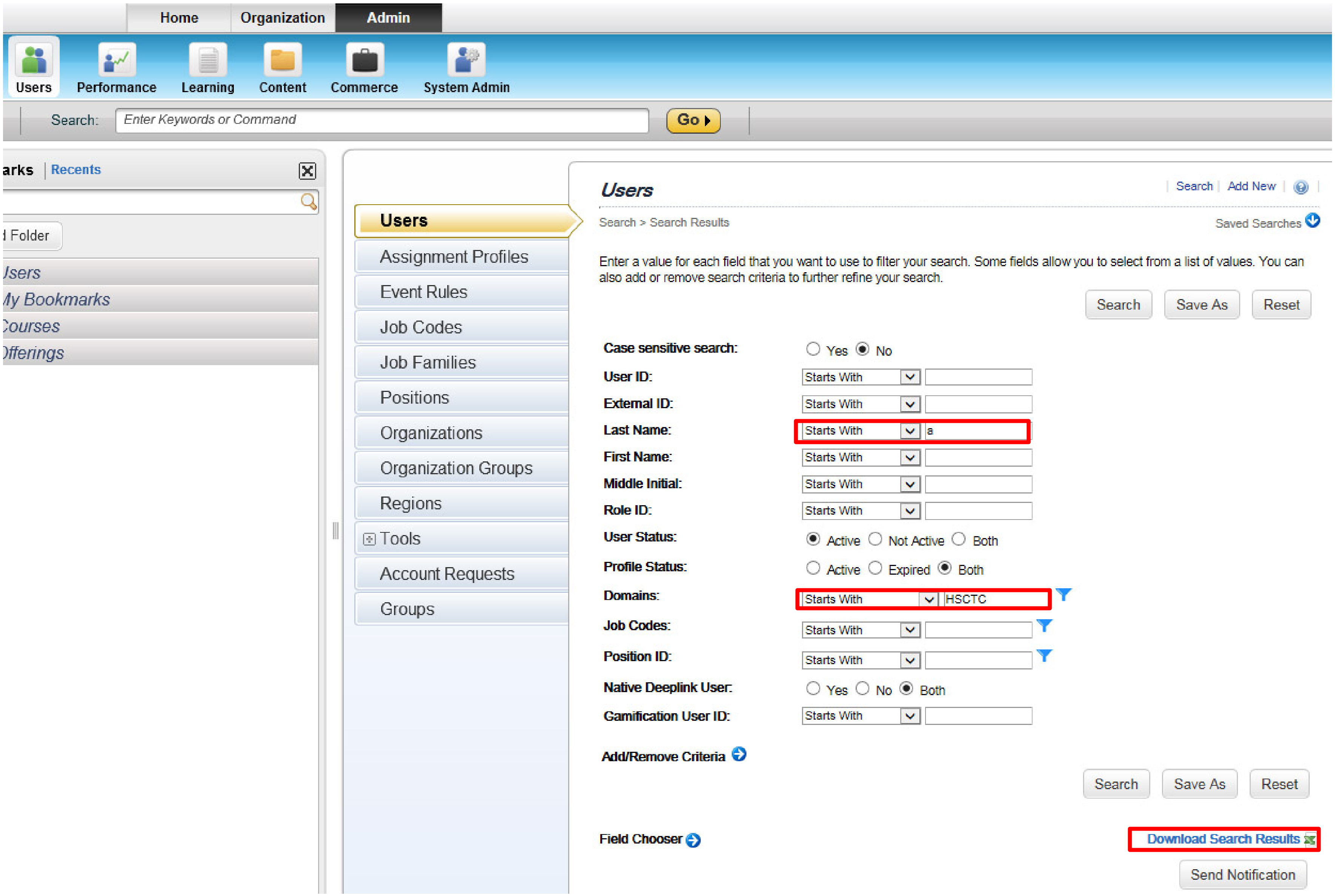
- After clicking Submit on previous screen, save the “EntityTemplate_User.xlsx” file onto your computer.

- 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, <u>**as well as the User ID column**</u>, will all need data.

Export Users



Export Users (cont.)

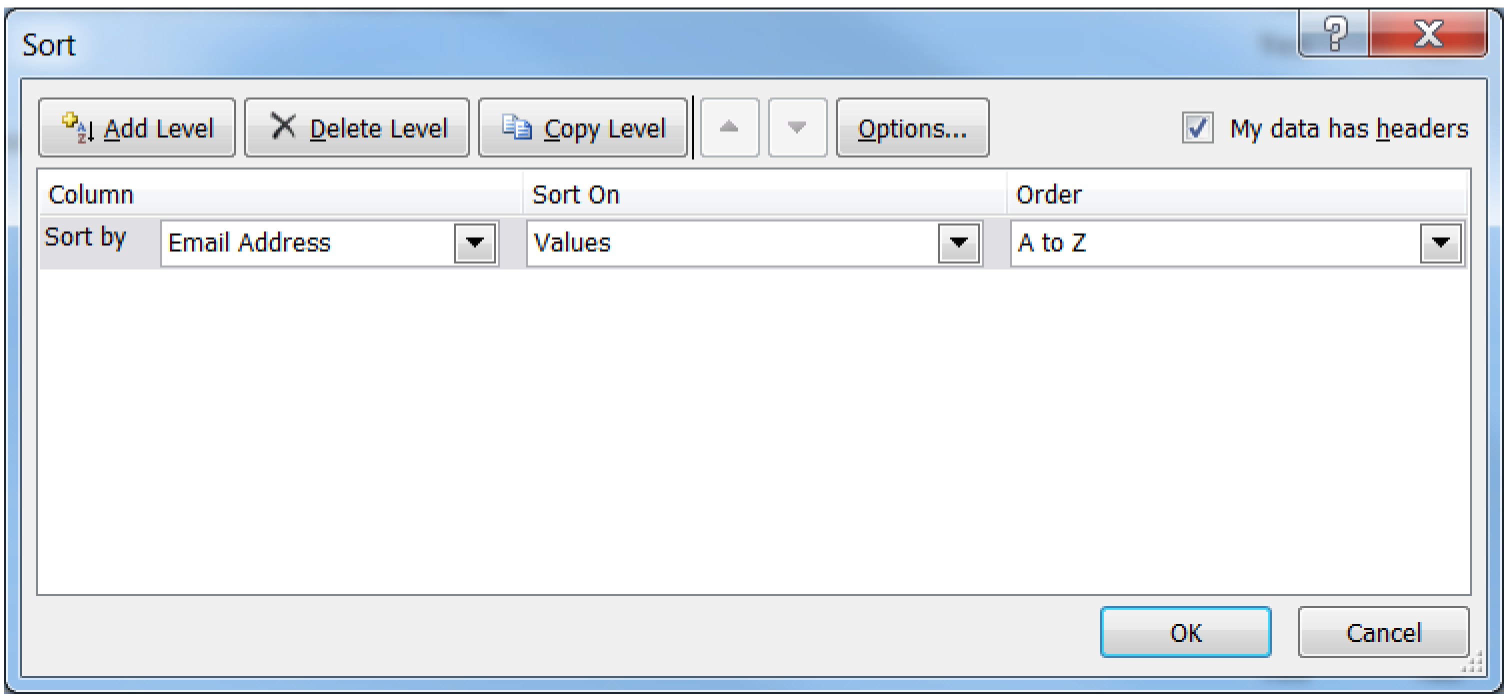
- Due to LMS limitations, export users in 26 groups, grouped by first letter of last name. Each group should have its own csv file called “SearchResult_Student.csv” with the letter included in file name, such as “SearchResult_Student_A.csv”.

- 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.

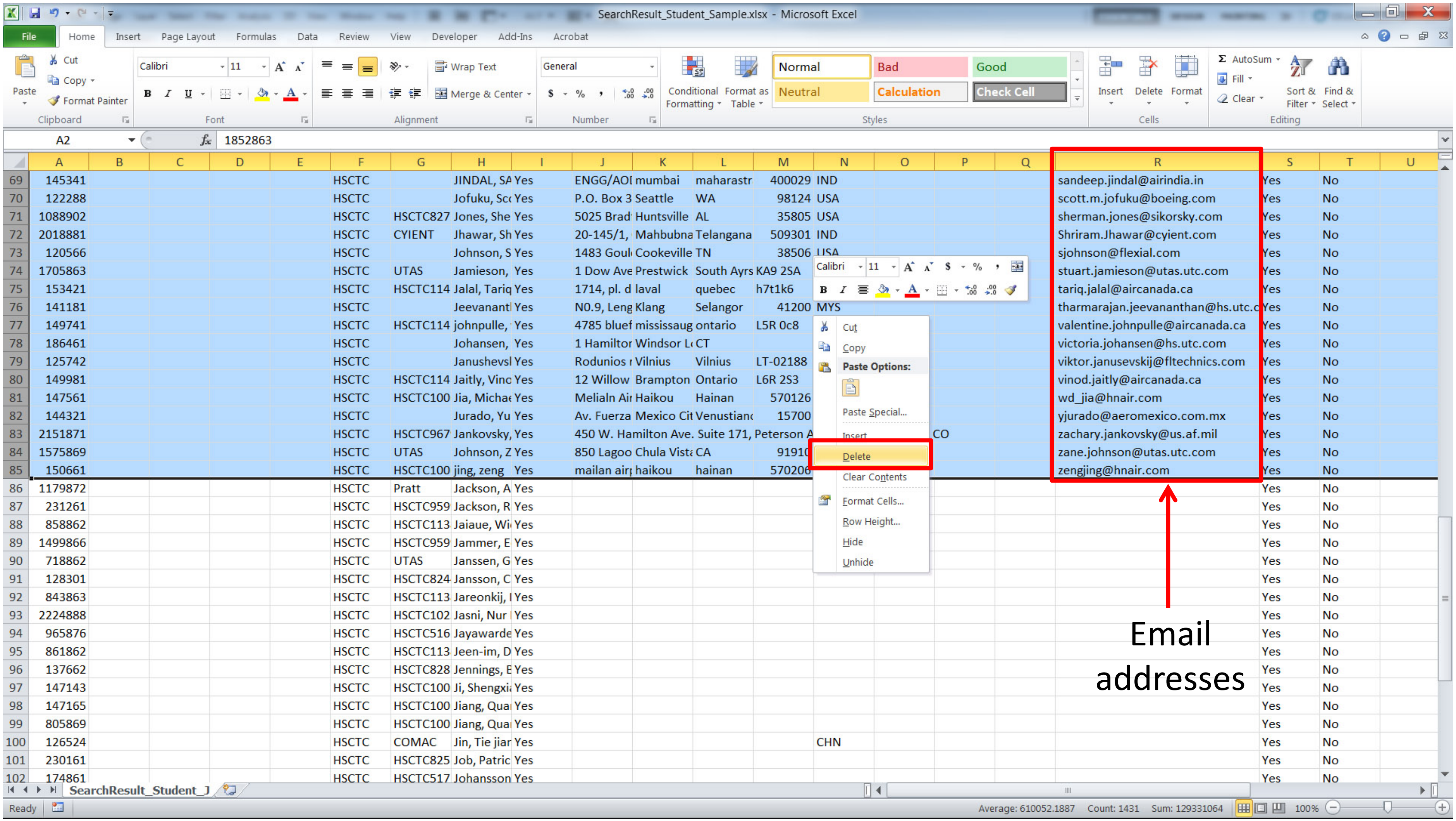
Sort User files and delete Users

- 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.



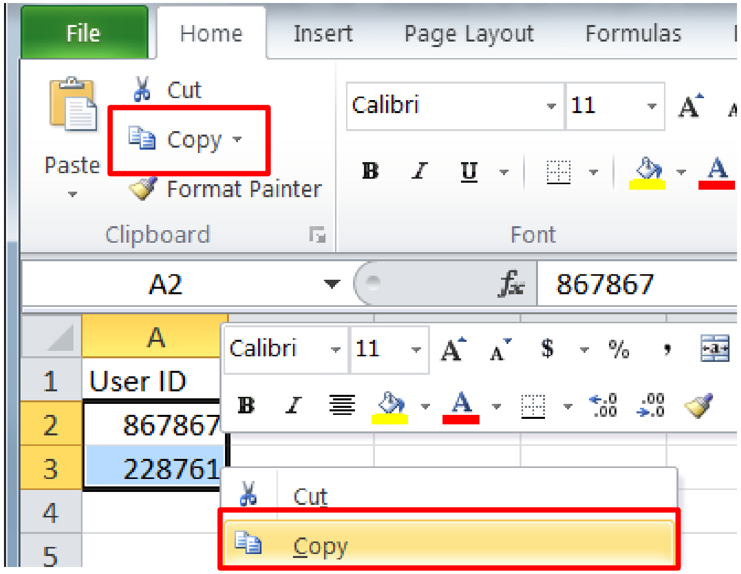
Delete Users, Save File

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



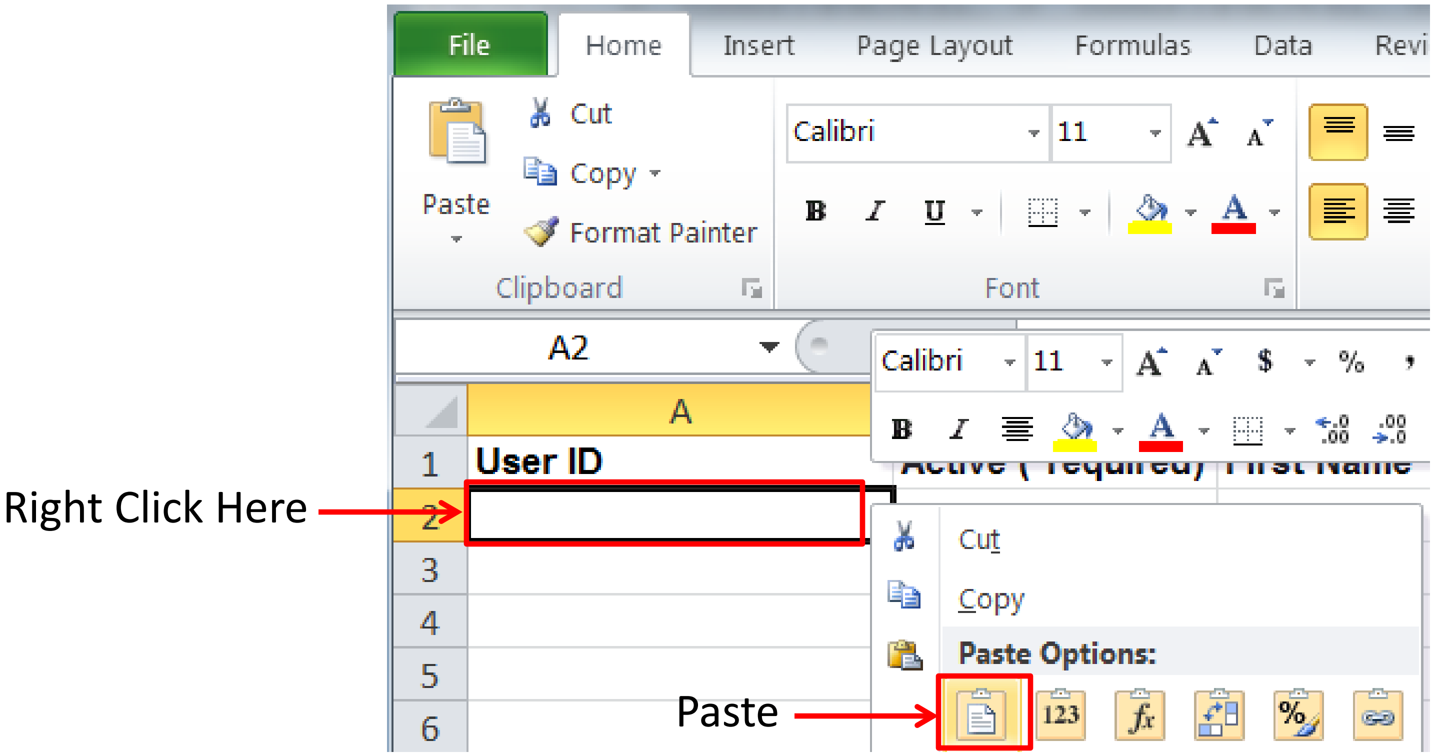
Merge User ID

- 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)



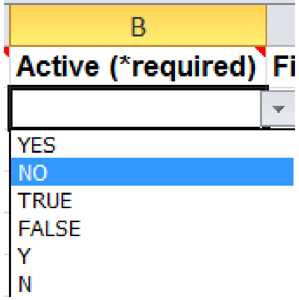
Merge User ID (cont.)

- 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”

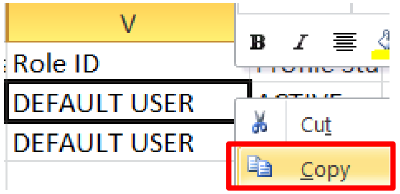
- In the “EntityTemplate_User_A.xlsx” file, change “Active (*required)” column for the first row to “No” using the pulldown menu. You do not have to remove the “(*required)” text from heading.



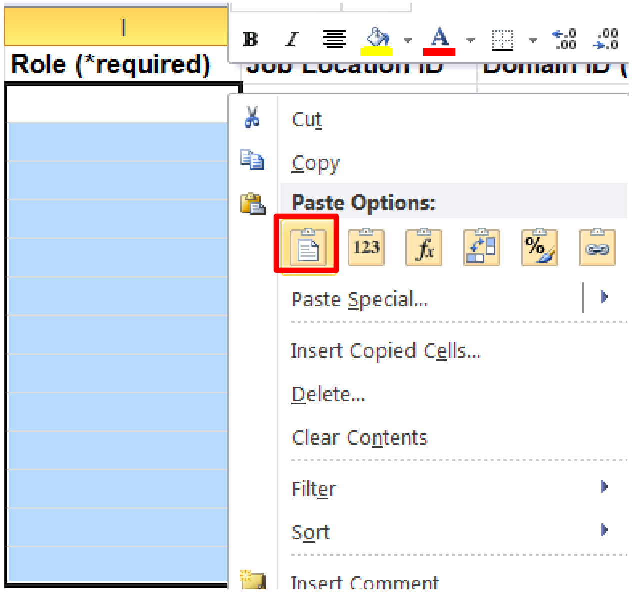
- You can then select the cell and copy.
- Select all the remaining rows for the Active column and paste.
- You should now have “No” in each row that has a User ID.

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.)

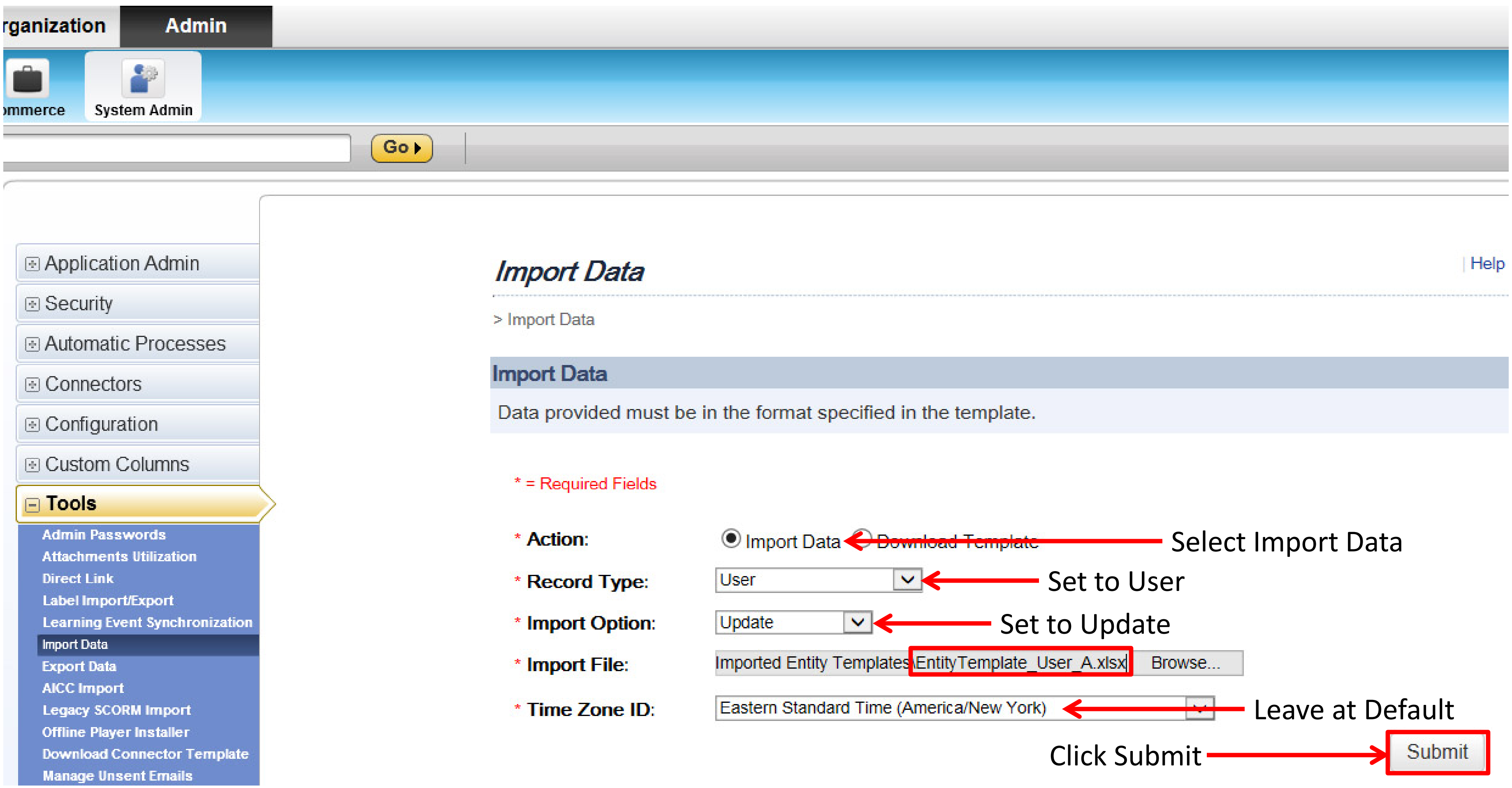
- If the Roles are NOT the same for the users currently being updated, using the instructions for merging User ID shown on “Merge User ID” slides (9 & 10):
  - Copy the entire “Role ID” column in “SearchResult_Student_A.xlsx”
  - Paste into “Role (*required)” column of “EntityTemplate_User_A.xlsx”.

Merge Domain

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

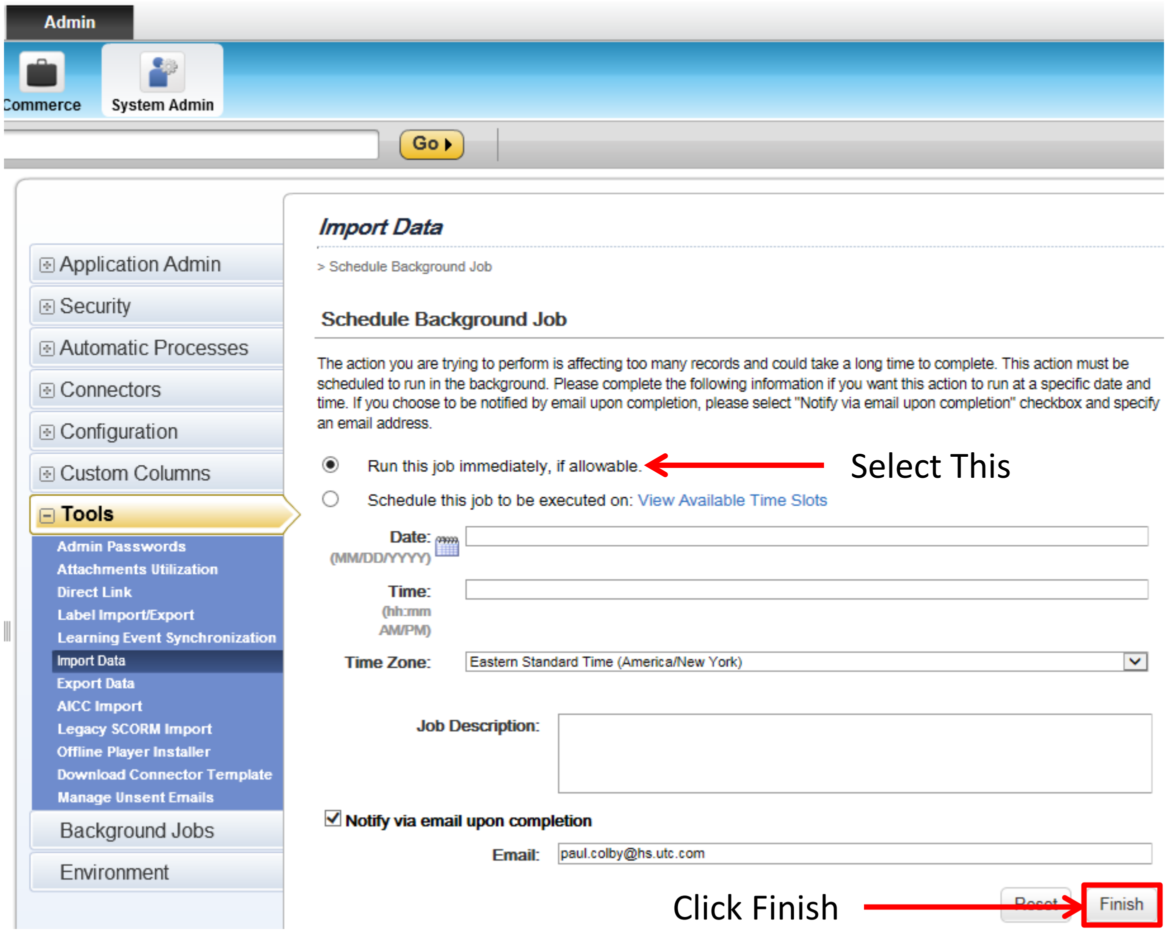
Importing Data

- 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.



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".



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.