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## What are the options for maintaining my learners in HSI Blue Ocean Brain?

Regardless of whether your organization utilizes Single Sign-On (SSO), Learner Admins have multiple options for efficiently adding, removing, and managing learners within HSI Blue Ocean Brain.

### Learner Management Options for Customers with Single Sign-On (SSO)

Learner Admins utilizing Single Sign-On (SSO) through their organization can use any of the following options for managing their learners in HSI Blue Ocean Brain. To learn more about each option, select the link.

- [Single Sign-On with Just-In-Time Auto Provisioning \(SSO with JIT A/P\)](#)
- [Single Sign-On with SFTP](#)
- [Single Sign-On with SCIM Provisioning](#) (*Note: only available for customers using Microsoft Azure and Okta*)
- [Single Sign-On with Self Import](#) (by employee file or individual basis)

### Learner Management Options for Customers without Single Sign-On

Learner Admins utilizing individually generated usernames and passwords for their learners can use any of the following options for managing their learners in HSI Blue Ocean Brain. To learn more about each option, select the link.

- [Auto-Provisioning by Domain](#)
- [SFTP](#)
- [Self-Import](#) (by employee file or individual basis)

## How do I download my current Learner list in HSI Blue Ocean Brain?

To download a list of learners in HSI Blue Ocean Brain, log into HSI Blue Ocean Brain and select **Admin** in the top right toolbar. In the drop-down menu, select **Learners**. In the left side Search feature, ensure that the appropriate search criteria of the data are selected. Once search criteria are selected, select Search.

- If a list of only registered learners is desired, select "Active" from the dropdown.
- If a listing of both registered and deactivated learners is desired, select "All" from the drop-down.
- If a listing of deactivated learners is desired, select "Inactive" from the drop-down.
- If the wrong search criteria was selected, change the search criteria and select the Search button again to reset the selection.

Once the desired search settings have been enabled, select the three dots icon next to the Create button, then select "**Export**" from the drop-down menu to download the Learner file.

The Export button generates a zipped folder. Inside the zipped folder will be an Excel file in CSV format of all of Learners, including:

- First Name
- Last Name
- Email
- Any additional metadata fields in the HSI BOB system
- Registered (A learner with a registered license will appear with a 1 in this column; a learner with a deactivated account will appear with a 0 in this column)

To access the CSV file, you may need to extract the file from the zipped folder and save it to your device.

*Note: The features under the Admin menu are enabled individually for Learning Leaders at each organization. If you believe that you should have access to one or more of these features, please email our Support Team with your name, organization, and a brief description of your request and your request will be forwarded to the appropriate person at your organization for approval.*

## How do I add a single Learner to Blue Ocean Brain?

Log into HSI Blue Ocean Brain and select **Admin** in the top right toolbar. In the drop-down menu, select **Learners**. Select the **Create** button to the top right to access the New Learner page. A new page will open. Under General, enter the learner's information. Under Learner License Registration, ensure that the Register License toggle is turned on, changing to a blue color. Under Additional Information, complete any additional fields. Any fields marked with an asterisk (\*) must be completed.

Select **Create** to save the record or select **Create and Edit** to create a new learner and then open that individual's record in HSI BOB. If enabled at the group level, the Welcome communication will automatically be sent via email once a learner is created.

### Note:

- *Username will default to the entered email address if none is provided. Username and email address are unique identifiers. A group cannot have two Learners with the same email address or username.*
- *The additional fields under Additional Information are determined by each company when their Learner file is provided to the HSI BOB Support Team prior to Launch. If more fields are needed, please provide a file that includes these fields to HSI BOB Support Team to make applicable changes.*

## How do I edit a single Learner in Blue Ocean Brain?

Log into HSI Blue Ocean Brain and select **Admin** in the top right toolbar. In the drop-down menu, select **Learners**. From the Learners page, search for the desired learner using the Search feature on the left hand side. Once you have found the learner you'd like to update, select the pencil icon in the rightmost column, labeled Edit, to access the Edit Learner page.

Once the Edit Learner page loads, edit information in the First Name, Last Name, Email Address, Username, Language, Learner License Registration, and/or Additional Information fields. When all changes have been made, select **Save** at the bottom of the page to apply the changes.

## How do I deactivate a single Learner in Blue Ocean Brain?

Log into Blue Ocean Brain and select **Admin** in the top right toolbar. In the drop-down menu, select **Learners**. From the Learners page, search for the desired learner using the Search feature on the left-hand side. Once you have found the learner you'd like to update, select the pencil icon in the rightmost column, labeled Edit, to access the Edit Learner page.

Once the Edit Learner page loads, toggle the **Learner License Registration** toggle from Register License (blue if registered) to off (gray if not registered). When all changes have been made, select **Save** at the bottom of the page to apply the changes.

## How do I search for specific learners at my organization?

Learner Admins may access the Learner Management page to search for a specific learner on the HSI Blue Ocean Brain (BOB) platform.

Navigate to the Learners page by logging into HSI Blue Ocean Brain and selecting **Admin** in the top right toolbar. In the dropdown menu, select **Learners**. On the left-hand side of the Learners page, use the Search filter to find the desired learner. Enter the Learner's full or partial name or email address in the appropriate field and press **Search**.

To reset the search, delete the learner's information from the text fields and press **Search** again.

*Note: The features under the Admin menu are enabled individually for Learning Leaders at each organization. If you believe that you should have access to one or more of these features, please email our Support Team with your name, organization, and a brief description of your request and your request will be forwarded to the appropriate person at your organization for approval.*

## How do I add/update/deactivate multiple Learners in bulk in HSI Blue Ocean Brain?

Changes to multiple learners are applied by uploading an Excel file in CSV format, with a row for each learner and a column for each field to be updated.

To add, update, or remove multiple learners at once:

- Log into HSI Blue Ocean Brain and select **Admin** in the top right toolbar. In the drop-down menu, select **Learners**. Once the Learner Management page loads, select the three dots icon to the right of the Create button, then select **Import**.
- Select Browse and search for the CSV file containing the Learners that will be added and updated or removed. Select the file and select **Open**.
- Select the desired Import Mode from the Mode dropdown menu (see explanations below), then select **Continue**.
- Map your file's column headers to the corresponding data fields in HSI BOB. The system should auto-select most or all fields. If a field reads N/A, be sure to update the mapping to match the correct data field, or the information will not be mapped.
- Select **Update Mappings and Run** to process the file.

You will receive an email with the results. If any errors are reported or you have any questions, please email our Support Team for assistance.

*Note: Uploaded CSV files may take up to 24 hours to process. If welcome emails are turned on at the group level, new learners in the file will receive an email with their initial login credentials once the upload is processed.*

### Import Modes & Best Practices:

**Create & Update/Reactivate & De-Activate Missing**: Use “Create & Update/Re-activate & De-activate missing” only for importing a full file of all of your Learners who should have access. Any name left off the file will be deactivated, any new name in the file will be added, and any existing name will be updated (if metadata in BOB does not match the file).

**Create & Update/Reactivate**: Use “Create & Update/Re-activate” to when a learner listing contains only learners to add to HSI BOB and/or learners you'd like update in BOB. This mode will not deactivate any existing HSI BOB learners.

**De-activate**: Use “De-activate” for when a learning listing only contains learners you would like to remove HSI BOB access from (ex. list of terminated employees).

## Auto-Provisioning by Domain - Username and Password

Auto-provisioning by domain allows customers to enable employee self-registration, so long as the learner's email address contains a specific business domain. Employees enter their first name, last name, and email, then create a password and verify their email to automatically create an account.

### To enable auto-provisioning by domain for your learners, the following requirements must be met:

- Learners must have a real business email address
- The customer must provide a specific list of business email domains to be used, and must not be utilizing Single Sign-On (SSO).
- Each domain can only match to one group (e.g. @abc.com can only match to one group)

Pros of Auto-Provisioning by Domain	Cons of Auto-Provisioning by Domain
Typically, no customer IT involvement is required to set up	If learners are terminated and the customer doesn't provide the list of terminations to HSI Blue Ocean Brain, the data is not removed
Learners can be added to HSI Blue Ocean Brain without providing an employee list	Learners must visit HSI Blue Ocean Brain and create an account to access
	For license-based customers, another method of learner management should be used to ensure the customer stays within the license limit

## Just-In-Time Auto-Provisioning (JIT A/P) - Single Sign-On (SSO)

Just-In-Time Auto-Provisioning (JIT A/P) allows SSO-enabled learners to automatically create their accounts upon first accessing the site via the company-specific login link.

### To enable JIT A/P for your learners, the following requirements must be met:

- Single Sign-On (SSO) must be set up with HSI Blue Ocean Brain.
- Your organization's IT team will likely need to be involved in SSO set-up and maintenance/management of access.

Pros of JIT A/P	Cons of JIT A/P
Learners can be added to HSI Blue Ocean Brain without providing a list of employees	Learner must click on the SSO-specific login link to create an account
Learner fields (with the exception of username/NameID field) are updated upon the learner logging into HSI Blue Ocean Brain	Learners must be using a desktop or internet app (NOT mobile app) to auto-create an account
	If Learners are terminated and the customer doesn't provide the list of terminated employees to HSI Blue Ocean Brain, the data is not removed
	If fields are updated on the learner's SSO account, the updates don't pass to HSI Blue Ocean Brain until the learner logs in again
	For license-based customers, another method of learner management may be used to ensure the customer stays within the license limit

## System for Cross-domain Identity Management (SCIM) - Single Sign-On (SSO)

This learner management option lets SSO-configured customers manage their HSI Blue Ocean Brain employee list directly from their SSO provider. Learner updates withing the SSO provider—additions, removals, or changes—are automatically reflected in HSI Blue Ocean Brain.

### To enable SCIM provisioning for your learners, the following requirements must be met:

- Single Sign-On (SSO) must be set up and SCIM must be available for the customer's SSO provider (currently only available for customers utilizing Microsoft Azure or Okta for Single Sign-On).
- Your organization's IT team will need to be involved in SSO set-up and management of access for your learners.

Pros of SCIM Provisioning	Cons of SCIM Provisioning
SCIM controls adding new learners, updating current learners, deactivating learners, and reactivating learners	SCIM requires customer IT involvement for setup and maintenance of Single Sign-On accounts
SCIM allows for the management of learners "in-house" without needing to contact HSI Blue Ocean Brain or send employee listings	The HSI Blue Ocean Brain Team has limited ability to troubleshoot.
	If Email is used as the NameID, the customer will need to make the adjustment to the account manually within HSI Blue Ocean Brain.

## Secure File Transfer Protocol (SFTP) - Single Sign-On (SSO) or Username and Password

SFTP allows the customer to upload a full learner file, sent from the customer's HRIS system or manually added by the customer, to a SFTP server. Once the file is placed in the SFTP server, HSI Blue Ocean Brain sets up automation to download the employee listing and upload it to HSI Blue Ocean Brain.

### To enable SFTP for managing your learners, the following requirements must be met:

- Customer IT involvement for setup
- Manual or automated employee files must be sent regularly (as often as the customer would like to send files - most customers provide an updated employee file on a weekly basis)
- The employee file must be the full list of learners who should have HSI Blue Ocean Brain access. When a new file is sent, the system adds any new learners on the file and deactivates any current learners who are not included on the file.

Pros of SFTP	Cons of SFTP
Once set up, further involvement from the customer's IT team is rarely needed	Requires customer IT involvement to set up and make changes to the file
The HSI Blue Ocean Brain automation checks for new files hourly, with no limit on how often customers send files	
Files can be sent via automation by the customer, making this a "hands-off" experience	

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## Self-Import - Single Sign-On (SSO) or Username and Password

Customers with the Learner Admin permissions can utilize the Self-Import function in two ways: to upload a full or partial learner file, or to update learners on an individual basis. When uploading a file to HSI Blue Ocean Brain, learner admins will receive a confirmation email containing the successes and errors of records imported.

### To utilize Self-Import for managing learners with a full or partial employee list, the following requirements must be met:

- The employee list must be a .csv file including first name, last name, and email address for each learner.
- The person uploading the employee list must have Learner Admin access in HSI Blue Ocean Brain and should receive instructions on best practices when uploading files.

Pros for Self-Import (full or partial file)	Cons for Self-Import (full or partial file)
No customer or BOB IT involvement	File uploads are done manually, this process cannot be automated
Uploads can be made at any time	

The Learner Admin permission also allows learning leaders to add, update, reactivate, or deactivate learners one-by-one within the Learner Management portal. While this allows learning leaders to make quick updates to their learner list at any time, it can be a manual and time-consuming process if the group is large.