E-Mail Invitation based Browser Extension Rollout

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Learn how to organize the Userlane rollout, manage user access, and enhance user profiles for targeted engagement.

About User Import for Third-Party Applications

The user import feature allows you to upload a list of your users that can use Userlane via the browser extension. This not only allows you to address all your users easily but also enables user-group-specific targeting.

When to use it

There are different use cases why you should import your users:

1. Single Activation: Test Userlane with some users only
2. Complete Rollout: The first rollout for all users
3. Segmentation
4. Maintenance

For each use case, you need a CSV or Excel file with your users.

Prepare the CSV/Excel File for Import

To upload a list of users, you'll need a file in CSV or Excel format (.csv or .xlsx) with their email addresses and optional attributes. You can either ask your tech department for the file or create it yourself.

- In the file, each row represents one user.
- The first row should contain column headers for email and any custom attributes.
- The email column is the identifier and must have the header "email." Email addresses need to be entered in **all lowercase letters**.
    - If ID is your identifier, it should be used instead of email.
- The column headers must be the same as the ones you set up as attributes. The order of columns doesn't matter, and you can skip columns during the import process.
- Please remove any formatting.

Example: Table Sheet

	A	B	C
1	email	role_text	csm_truefalse
2	example@example.com	admin	false
3	example2@example.com	manager	true
4			
5			
6			

Example: Converted into a CSV file

```
email,role_text,csm_truefalse
example@example.com,admin,false
example2@example.com,manager,true
```

Single Activation: test Userlane only with some users

Roll out Userlane only for specific test users via:

1. **Self-Invitation**: Your employees can register themselves with their working email address via https://family.userlane.com/mll if the working email domain is registered in Userlane (ask your Customer Value Manager if you are not sure). Then they'll receive a confirmation email with their Userlane access.

2. **Uploading**: You can create a short test user list to send the email invite directly to those test users only. You can upload new Users by selecting *Settings > Company Users - Add Users*

Rollout Userlane to all users

If you plan to roll Userlane out for the first time to all your users, you can import a complete user list and trigger the invitation mail to all users at once. You can upload new Users by selecting *Settings > Company Users - Add Users*

In the uploading process, you have the choice to:

- **Invite all your users automatically:** After this process, all your imported users will receive an invitation email to activate their accounts.

- **Finish the user upload without the invitation for now:**In this case, you can send the email invites to all users later under *Settings > Company Users - Send Invite.*

After adding the users you'll see all the uploaded users with their status in the *User* overview.

Segmentation: Target your users with specific content

You can use custom user attributes to define user segments that should see specific content (e.g. a chapter that is only useful for admins). To do this:

1. Create a segmentation concept: to have a clear plan of who should see which tours and how you'll

differentiate between users.

2. **Create the attributes** you decided to use from the Portal under Account > Global Settings: you can also do this during the import process.
3. Create your user **CSV/Excel file** with the respective attributes.
4. Follow the **import process** and match the attributes in the Portal with those in your list. You can create now the attributes that are still not in your Portal.
5. **Create your user segments**: using the attributes you create you can now create your user segments (aka. user groups).
6. **Apply your user segments**: once this is done, only the users within those segments will have access to the Guides/chapters you applied the segmentation.

Good to know

- The users you import will be called Company Users.
- You can use any attributes of these users to group them in the Segment section. Find out more about how to show different chapters/Guides for other user groups.
- After importing and inviting your users, you will see your new Users only in the Settings > Company Users section, but not in the Segment - Users section. The User overview in the Segment section only shows users that opened the application after they activated Userlane. Once a user activates the browser extension via the invitation email and accesses one of your applications, they will also appear in the Segment section.

Maintenance

1. Understand Status

After uploading a user list you'll see the status of each user under *Settings > Company Users*.

- **Imported:** the user is already uploaded but isn't invited yet.
- **Pending:** the user already received the invitation mail, but didn't confirm yet.
- **Active:** the user already completed the Userlane browser extension activation via email within at least one browser and can now use Userlane in the software.
- **Created:** the user was created via SSO and becomes active once going to the application and seeing Userlane.

2. Change Status

If you want to change this status, you can

- **(re-) invite individual users** by clicking on the options (three little dots) next to the user and choosing "Activate".

- **Invite all imported users** at once by clicking on *Send Invite* and choosing to *Send to imported users.*
- **Re-invite all your pending users** at once by clicking on *Send Invite*, and choosing to *Resend to pending users*. This action will only address pending users who have not been sent an email invite within 48 hours.
- **Terminate access for individual users** by clicking at the options (three little dots) next to the user and choosing *Delete*. This will prevent them from seeing Userlane.

3. Change Attributes for users

- Create your user CSV/Excel file with the respective attributes and upload it under *Settings > Company Users*
    - This file is the same style as the one used for the initial invitation as described in How it works but with the updated list of users and/or attributes

4. Inviting new Users later on

- Regularly promote magic link https://family.userlane.com/mll to allow for self-invitation
- Manually re-invite users via uploading of users under *Settings > Company Users*

Good to know

What happens when a user has a new device?

- If a browser profile has been saved and is activated again, Userlane is still available. No further action needed.
- If a browser profile was not saved, Userlane is not available anymore.