



Bulk Import Training Records

Bulk importing [training records](#) is useful when you have existing records that need to be added to the Intranet, either because they are from a different LMS, were achieved in the real world, or you're simply making changes to those that already exist in Claromentis.

This functionality is available on the [admin side of the Learning application](#), Admin > Learning > Bulk Import/Export

A screenshot of the 'Bulk Import/Export Training Records' page in the Claromentis admin interface. The page has a left sidebar with navigation options: Admin, Learning Path, Training Records, Certificate Expiration, Bulk Import/Export (selected), and Qualification Codes. The main content area is titled 'Bulk Import/Export Training Records' and contains instructions: 'If you wish to bulk update Training Records, Export the current selection as a CSV and remove the "email", "firstname" and "lastname" columns. To bulk delete records, simply set the "Delete?" column to "1" on the rows you wish to remove from the records. The column headings in an imported file should be: Record Id, Name, Record Type, Object Id, Title, Training Provider, Completion Date, Other Information, Qualification Code and Delete?'. Below the text are three buttons: 'Choose file' (with 'No file chosen' text), 'Browse Documents', and 'Import from CSV'. On the right side, there is a 'Download CSV Template' button and an 'Export as CSV' button.

□ **Tip:** If you would like to add custom fields to the Training Records, such as 'Type of Training', 'Class Size', 'Training Hours', etc., these can be included by first adding them as [Metadata](#) to the system (Admin > Metadata > Training Record (add as a new set if not visible at first))

Step 1: Download the CSV Template

Click on the 'Download CSV Template' button to get a spreadsheet with the correct columns to use at import:

A screenshot of the 'Bulk Import/Export Training Records' page, identical to the one above. In this version, the 'Download CSV Template' button is highlighted with a red rectangular box to draw attention to it.

Open the file locally with a spreadsheet program, e.g. Microsoft [Excel](#), Mac Numbers, Google Sheets, etc

Record Id	Name	Record Type	Object Id	Title	Training Provider	Completion Date	Other Information	Qualification Code	Delete?
0	john_a	Training Record	0	A Training Record	The training provider for this training record	yyyy-mm-dd	Any other record information		0
0	sam_b	Training Record	0	Record to Delete		2015-01-01	Delete flag set to true. Will delete this record	CODE_ABC	1
0	jane_c	E-Learning	27	Health & Safety Course		2015-02-02	Object Id set here is the ID corresponding to the course in E-Learning	COURSE_A	0

Step 2: Populate the spreadsheet

Enter the desired information into the sheet ready for import:

- Record ID

- Each **training record** has a unique Record ID. You must use the same record ID if you wish to update/edit the record. For a new record, use '0' (zero).

- Name

- The name should match the unique **username** of the user you wish to add a record to. Please note that the user must **exist on your site** for a training record to be added for them.

- Record Type

- For a standard Training Record entry, use **Training Record**

- Object ID

- The object ID is a reference to a unique Learning object in the database, for example, it might be a Training Event or E-learning **Course**, use '0' (zero)

- Title

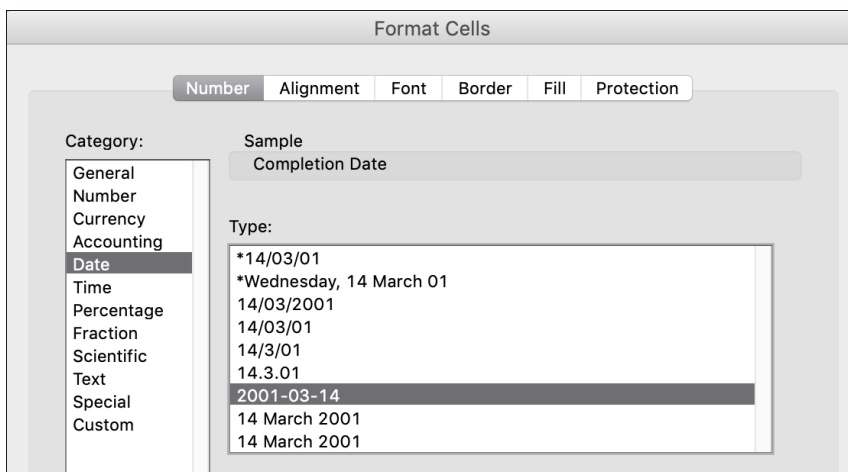
- Title is the title of the training record for example, **Introduction to Project Management**

- Training Provider

- The training provider is the name of the organisation that provides the training, for example, **Corporate Learning Ltd.**

- Completion Date

- Completion date of the record (if applicable)
- Use the following format: **YYYY-MM-DD**, for example, **2019-06-17**
- Please note:** If using Microsoft Excel, be aware that this can often automatically **change the date format**. To change to the above format, you can right-click in the column heading and click **Format Cell**
- Choose **Number > Date > 2001-03-14**



- Other Information

- Other information is text that you can add extra information about the training, it is optional.

- Qualification Code

- If you want to tie this record into a [Learning Path](#), give it an existing [qualification code](#), or create a new one by typing in its title here.

- Metadata Fields

- Any fields your team has custom-added in Admin > [Metadata](#) > Training record will be listed in the CSV. e.g., Instructor Name, Training Dates, Duration. The required data entry will relate to the field types chosen.

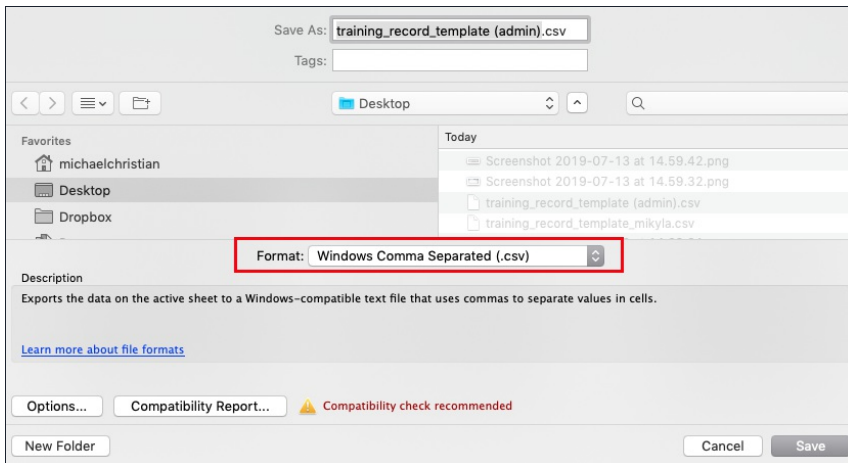
- Delete?

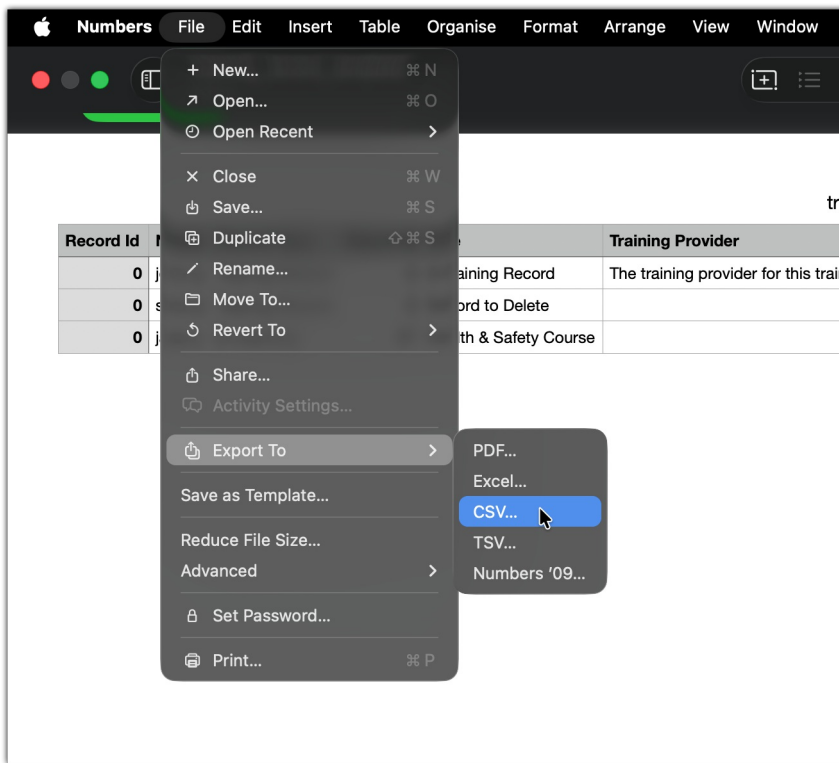
- It's possible to delete training records from the Intranet by placing a '1' in this column for each row you want to remove.
- Each entry must match an existing **Record ID** within the system to be deleted.
- For a new record or updates, just leave this column blank.
- **Please note:** Deletions are permanent, and records cannot be retrieved once removed. If errors are made, records would need to be added back manually, so you could keep an [export of all records](#) locally in case these need to be reinstated in the future.

Step 3: Save the CSV file

Once all data is entered and you are ready to import it, save the file or export it as a CSV.

This is important as some programs like Microsoft [Excel](#) require you to 'save as' first to save a file as a CSV, because using the 'Save' button saves it as a different type, which will not work with Claromentis.

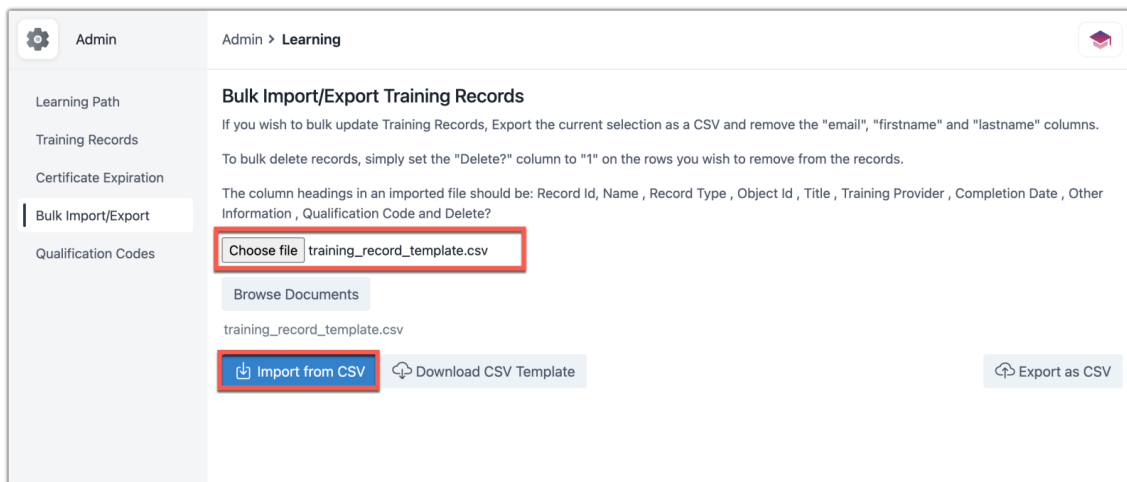




Step 4: Run the import

From Admin > Learning > Bulk import/Export, click on 'Choose file' to upload your prepared CSV file.

Once this completes, click 'Import from CSV' and the system will begin to process the data.



This should only take up to a minute, and a confirmation screen should appear detailing how many records were imported or deleted.

Check a user's training record to confirm that the updates were applied as expected.

Troubleshooting

The red boxes below are some common errors that may appear after a training record import has been run alongside likely solutions.

If you encounter a different error or errors persist, please [raise a support ticket](#) for us to assist you further.

Error: Non-numeric Record Id encountered on row 1

- You must put 0 for a new record in **Record Id** column rather than leave it blank
- Check the column header in your spreadsheet to make sure they match the CSV template exported in Step 1

Columns do not match header specification

- The column headings in the CSV file you are using to import do not match the template downloaded from the system. Please re-download the CSV template and make sure the column headings are identical.

A record completion date with an incorrect format has been found near row { 15 }

- Incorrect date format, the date format must be in YYYY-MM-DD

Created on 27 May 2026 by [Hannah Door](#). Last modified on 28 May 2026

Tags: [learning](#), [import](#), [record](#), [training](#)