



## Bulk Import Training Records

### Objective

Bulk importing training records is useful when you have a large number of records to populate the system or your simply performing a bulk update of many training records within your company or organisation.

This functionality is available from **Admin > Learning > Bulk Import/Export**

Admin / Learning

Learning Path
Training Records
Certificate Expiration
Bulk Import/Export
Qualification Codes

### Bulk Import/Export Training Records

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?

Choose file
No file chosen

Browse Documents

Import from CSV
Download CSV Template

Export as CSV

### Tips:

If you would like to have additional fields against a Training Record such as 'Type of Training', 'Class Size', 'Training Hours', please add these as metadata through Metadata Admin Panel.

### Step 1: Download CSV Template

Click on **Download CSV Template** button to get a spreadsheet template for bulk import. You can open CSV (Comma Separated Value) file using Spreadsheet software such as Microsoft Excel or Open Office.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Record Id	Name	Record Type	Object Id	Title	Training Provider	Completion Date	Other Information	Qualification	instructor_name	training_date	class_size	hours	type_of_training	delivery_method	etp	Delete?
2	0	john_a	Training Record	0	A Training Record	The training	yyyy-mm-dd	Any other record information									0
3	0	sam_b	Training Record	0	Record to Delete		01/01/15	Delete flag set	CODE_ABC								1
4	0	jane_c	E-Learning	27	Health & Safety Course		02/02/15	Object Id set	COURSE_A								0
5																	

### Step 2: Populate the spreadsheet

Simply populate the spreadsheet with the record you wish to 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 user must exist on the system for a training record to be added against that user.

#### Record Type

For a standard Training Record entry use **Training Record**, in addition, it is also possible to amend or alter Learning Path, and E-learning.

#### Object ID

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

## Title

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

## Training Provider

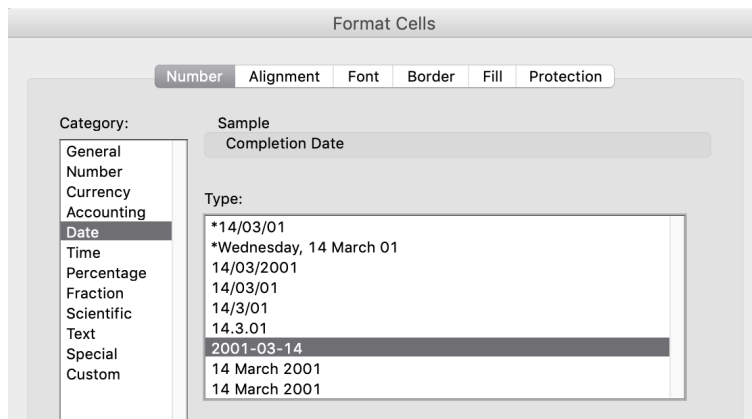
Training provider is the name of the organisation that provides the training for example **Corporate Learning Ltd.**

## Completion Date

Completion date is the date when the training is complete. You must populate completion date in the following format: **YYYY-MM-DD** for example **2019-06-17**

**Tips:** Microsoft Excel often automatically change the date format, in order 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 a text file that you can add extra information about the training, it is optional.

## Qualification Code

Qualification code is a unique code used for the completion of Learning Path. It connects various type of Learnings within Claromentis. For example, you may have training with title 'Introduction to Project Management' and it has a unique code **PM1** to represent that training.

## Metadata Fields

Some of the fields such as Instructor Name, Training Dates, Duration etc are called metadata fields. These are custom fields which are created on the system and will be different for each organisation.

## Delete ?

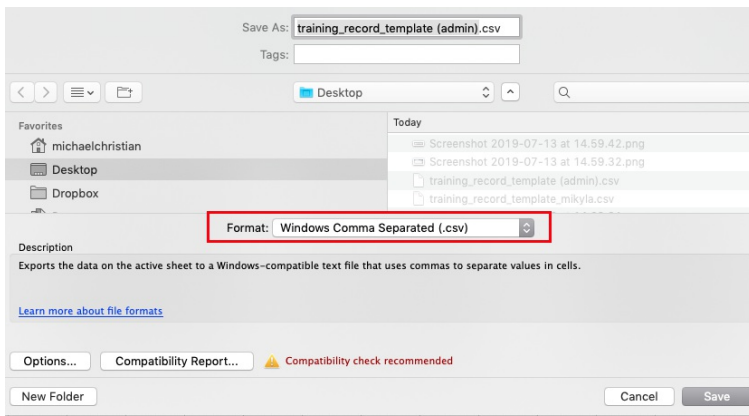
If you need to perform bulk deletion of existing Training Record, this field must be set to **1** (without quote) and it must have a match to the unique **Record ID** within the system.

For a new record or update just leave it blank.

## Step 3: Saving CSV File

Save the CSV file. Excel may give the following warning in which you can simply continue.

**Tips:** for Mac users, you may need to save your CSV file in Windows Comma Separated (.csv)



## Step 4: Performing Import

From [Admin > Learning > Bulk Import/Export](#) Click on 'choose file' to upload the CSV file you have prepared. and click **Import from CSV** button.

Upon successful import, you will get confirmation on how many records were imported.

**Tips:** Perform some check to the user's Training Record making sure they were imported correctly.

## Troubleshooting

Error: Non-numeric Record Id encountered on row 1

Possible cause:

- You must put 0 for new record in **Record Id** column rather than leave it blank
- Check column header in your spreadsheet to make sure they are matched with the exported CSV Template

Columns do not match header specification

- The column headings in the CSV file you are using to import does not match with 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

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Last modified on 1 December 2023 by [Hannah Door](#)

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