Import and manage training records

A Guide to importing and updating Lesson and Event history in Learn

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Contents

Introduction

This document describes how to create, edit, and delete training records via a bulk import process, and by manually amending individual records.

When a User's training record is updated for a Lesson, the status* of any Courses to which that Lesson is assigned will be updated accordingly.

A few principles around import:

- Set up all the Courses, Lessons and Accreditations before you import history
- The User, Course and Lesson for which history is imported must exist in Learn

** The 'Not started' status cannot be imported*

The Kallidus team of database administrators can import multiple instances of history for a User, for a Lesson. Please contact the Support team or your account manager for more information.

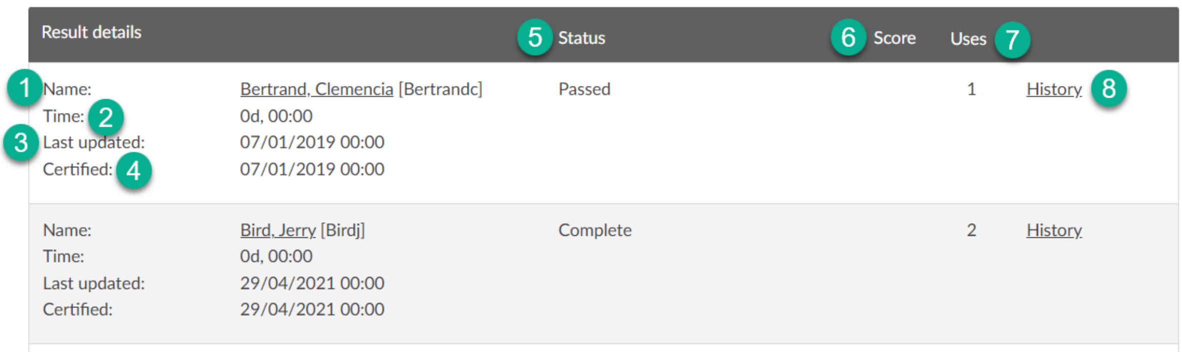
Find and view Lesson history

A user enrolled on a course (either by direct assignment to the course, or by choosing from a catalogue) will have a training record for all Lessons assigned to that Course.

All training records are saved at Lesson level. However that training record can be viewed by navigating either to a User, a Course, or a Lesson. In each case the same *Lesson* history is visible, however the context in which that history is viewed will differ. For example:

- Navigate to a **User** to show all Lesson history for that User
- Navigate to a **Course**, to see a Users' history for all Lessons assigned to the Course
- Navigate to a **Lesson**, to see a Users' history for that User, for that Lesson

A typical training record looks like this:



1	The Last name, First name and Username for the User
2	Time taken to complete the learning (eLearning lessons only). This counts from when the Lesson is first launched until it has a 'Complete' status.
3	The date and time the learning was last accessed (eLearning Lesson type only). Note: If review mode is used to access the content, this field will not be updated.
4	The date of the most recent completion of the Lesson
5	The status for the User, for the selected Lesson. See (p6) for more detail about Lesson statuses.
6	A score is recorded for some Lessons, for example an eLearning quiz (automatically populated by Learn), or Face-to-face assessment (manually populated by an administrator after an Event ends).
7	The number of times the User has accessed the Lesson. For example, a URL Lesson might have been viewed multiple times, in which case this number will reflect the number of views.
8	View all of the Users training records for the Lesson (where multiple records exist)

Lesson statuses

When enrolled on a Course (either by direct assignment to the course, or by choosing it from a catalogue), a User will have a training record for all Lesson(s) assigned to that course.

The training record will include the Users status for the Lesson(s). This Lessons status will be reflected for any Courses to which the Lesson is assigned (Lessons can be assigned to multiple Courses).

Depending on the status of assigned Lessons, a Course status will be one of the three options below:

- '**Not Started'** when no assigned Lessons have been started
- '**In Progress'** when one or more assigned Lessons have been started
- '**Complete**' when all assigned Lessons are complete

Learn considers statuses as being either positive or negative. For example, 'Not Started' is a negative status and 'Complete' is a positive status. When a Lesson has a positive status, the User has finished the Lesson. When a negative status is set for a Lesson, the Lesson is yet to be finished. Reports can be filtered to include Lessons with any ,or all of the possible statuses.

Statuses are set automatically by Learn. However, an administrator can manually override this and set any available status for a Lesson.

All possible statuses for each Lesson type are described in the table below. It is highly recommended that Administrators assign only the statuses shown in the below table:

<table>
<tr><th colspan="2"></th><th>Document Upload*</th><th>Document</th><th>URL</th><th>Competency check</th><th>eLearning</th><th>Instructor led**</th></tr>
<tr><td rowspan="4">Positive</td><td>Exempt</td><td></td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td></tr>
<tr><td>Complete</td><td>x</td><td>x</td><td>x</td><td></td><td>x</td><td>x</td></tr>
<tr><td>Passed</td><td></td><td></td><td></td><td>x</td><td>x</td><td>x</td></tr>
<tr><td>Attended</td><td></td><td></td><td></td><td></td><td></td><td>x</td></tr>
<tr><td rowspan="4">Negative</td><td>Not Started</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td></tr>
<tr><td>Failed</td><td></td><td></td><td></td><td>x</td><td>x</td><td>x</td></tr>
<tr><td>Cancelled</td><td></td><td></td><td></td><td></td><td></td><td>x</td></tr>
<tr><td>Declined</td><td></td><td></td><td></td><td></td><td></td><td>x</td></tr>
</table>

**Due to the nature of Document Upload Lessons (a document is required to set a status as complete), history cannot be bulk imported for this Lesson type.*

*** statuses for Instructor-led Lessons are defined by a User's status for associated Events. Training records for instructor-led training should only be created by updating Event history (Event history 'rolls up' to define the Lesson status, but Lesson history does not 'roll down' to update Event status).* *See 'Statuses for Instructor led Lessons' (p7) for more information.*

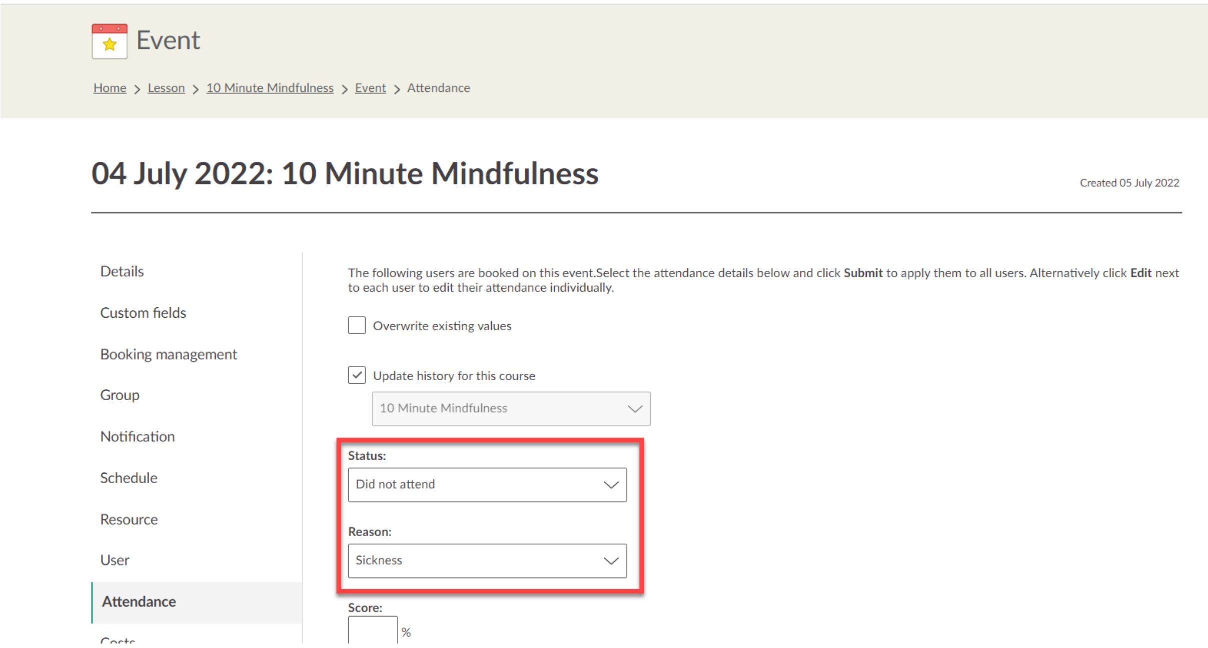
Statuses for Instructor led Lessons

A User’s status for an Instructor led Lesson is defined by their status for an associated Event. Therefore, in order to set a User’s status for an Instructor led Lesson (and any Courses to which the Lesson is assigned), their status for an associated Event must be updated. The Event status will then ‘roll up’ and set the User’s status for the Lesson to which it is assigned.

See the ‘Import history for Events’ section of this guide (p16) for more information about bulk importing Instructor led training records.

***Note**: Status for Instructor led Lessons should not be set at Lesson level, as this will not ‘roll down’ and update the Users status for an assigned Event.*

Event statuses can also be set individually at **Event | Attendance**:



Updating Event attendance is typically a task carried out after Events have finished and attendees have been recorded. Event attendance can also be set in bulk via a spreadsheet import. See the ‘Mark attendance for multiple Users’ section of this guide (p23) for more information.

If Event evaluations are configured, a request to complete the evaluation will be triggered instantly a User is marked as attended for the Event.

Reasons for Event statuses

In addition to defining a User’s status for an Event, Administrators can also record a Reason for the status given, which can then be included in reports. Event Reasons are optional and configurable by Administrators. They are defined at **Settings | Event**.

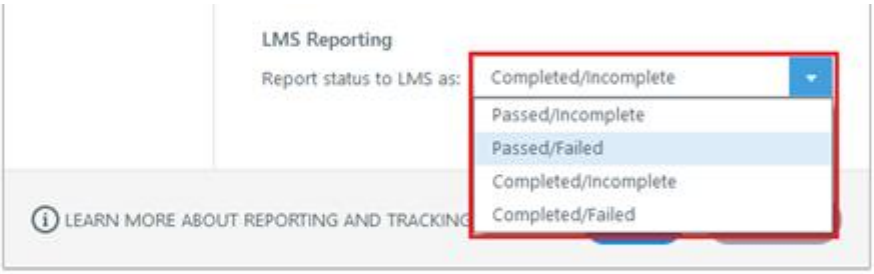
Once created, Reasons can be populated when an Administrator manually marks attendance and through bulk import of Event history. See the ‘Import history for Instructor led Lessons’ section of this guide (p16) for more information.

Statuses for eLearning Lessons

A SCORM eLearning package will report to Learn a User's status as they progress through the eLearning. This may be any of the below 'status pairs':

- Passed/Incomplete
- Passed/Failed
- Completed/Incomplete
- Completed/Failed

The status pair for each eLearning project is defined when the eLearning is published. For example, the below screenshot is taken from the publish process in Articulate storyline:



When reporting eLearning completions, it is therefore necessary to understand which status pair the eLearning has been configured to send to Learn*. As a 'catch all' a report could be configured to include all possible 'positive' and 'negative' statuses.

**The 'training record' report may be used to show all Lessons and statuses reported to Learn*

Statuses for Document Upload lessons

Document Upload Lesson are completed when a User or administrator uploads a document. As such, training history cannot be bulk imported for document upload Lessons.

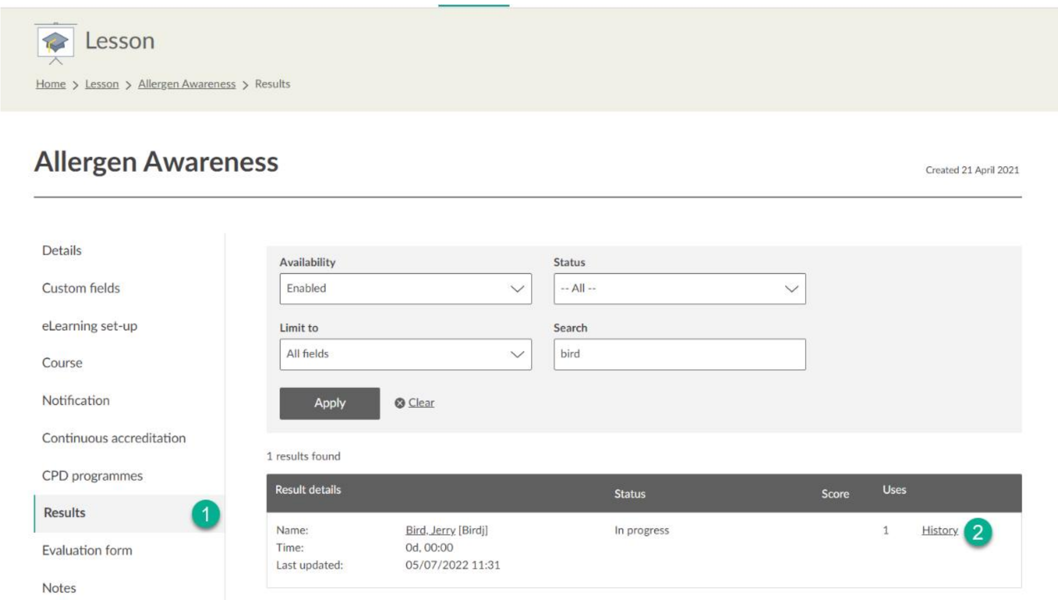
It is recommended that where history is required, learners upload the necessary documents as needed.

Add or update an individual training record

Administrators may sometimes be required to manually add or edit a training record for a User. For example when a User loses internet connection at the point of completing eLearning, and therefore no status is sent to Learn (where a User reports this issue, an administrator may ask for evidence of completion, for example a screenshot of the final page of the eLearning).

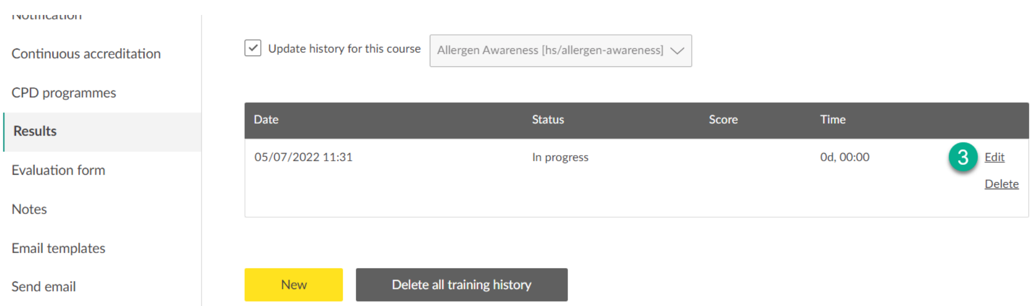
Note: for Instructor led Lessons, a User's status should be updated at Event level. To add or update a training record:

1. **View training records.** From the 'Courses' drop down menu, select 'Lesson to navigate to the Lesson area. Select a Lesson, then select 'Results' from the Lesson properties menu:



2. **Find the training record for the User.** Use the search to find the training record for a specific User (if no record exists, it may be because the Course of which the Lesson is part, is not assigned to the User). Select 'History' to view the Users training record for the Lesson.

3. **Add / edit the training record.** Select 'Edit' to update an existing training record or select 'New' to add a new training record. Amend the training record (take care to ensure the status given is correct for the Lesson type, as described in the 'Lesson Statuses' section of this guide, (p6)):



Bulk import training records

Training records can be added individually, however the option to bulk import via spreadsheet is more efficient where training records are to be added for multiple Users.

When populating an import spreadsheet, take care to ensure that only appropriate statuses are used. See the 'Lesson statuses' section of this guide (p6) for more information.

Note that:

- The import process can add one record only, per User, per Lesson*
- The User, Course and Lesson for which history is imported must exist in Learn
- When a training record is created/updated for a Lesson, the status of any assigned Courses will be updated accordingly.
- Where the import file specifies a Course code, the import will attempt to assign the Lesson to the Course (if no assignment already exists). **

** If an Administrator imports history for a Lesson where training records already exist for a User, then Learn will erase **all** history, leaving only the newly imported record. In some cases, the Kallidus support team can import multiple training records for a User, for a Lesson. Please contact the Support team or your account manager for more information.*

***Course code is a required field when the Lesson (for which history is imported) is assigned to multiple Courses in Learn.*

Prior to import, a spreadsheet must be populated with the training records. Follow this link to view an import template in The Academy.

Template spreadsheets for import

The Lesson import template looks like this:

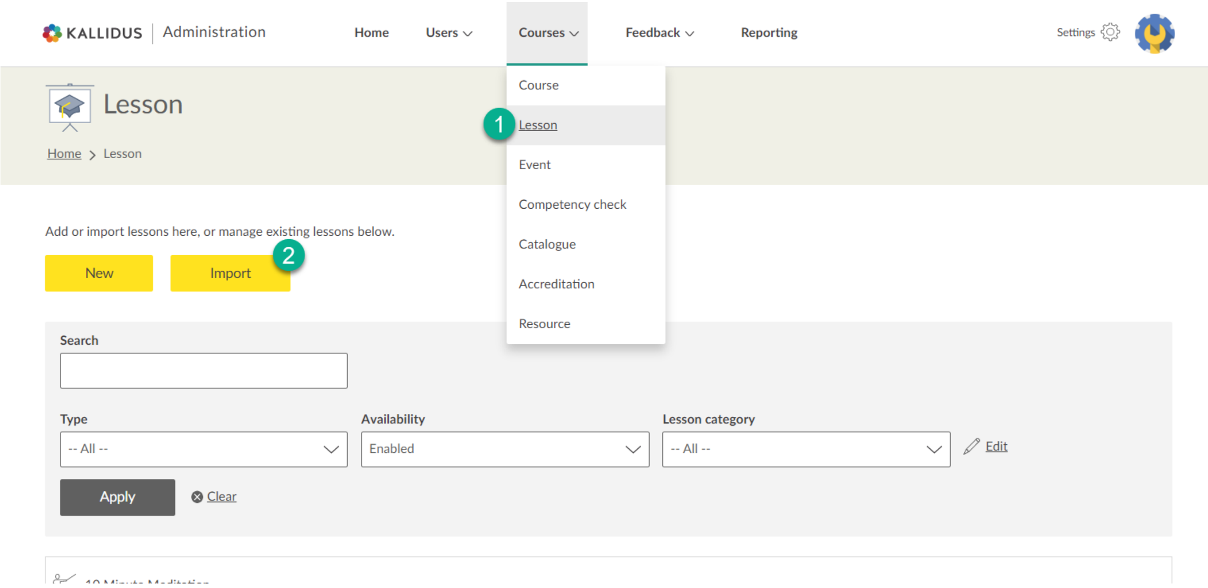
Course Code	Lesson code	Mandatory	Import Key	User name	Status	Date Created
HS_MH	HS_MH	Yes	2570	Collinsm	Success	03/05/2019
HS_MH	HS_MH	Yes	2571	Beardi	Success	24/08/2019
HS_MH	HS_MH	Yes	2572	Maypoler	Success	05/03/2019

The Event import template looks like this:

Course Code	Lesson code	Event code	Mandatory	Event start date	Event end date	Event location	Import Key	User name	Status
IND001	IND001	IND001 - 15/10/2019 09:00	Yes	15/10/2019 09:00	15/10/2019 13:00	Cirencester	6297	6297	Attended
IND002	IND002	IND002 - 16/10/2019 09:00	Yes	16/10/2019 09:00	16/10/2019 13:00	Cirencester	6297	6297	Cancelled
IND003	IND003	IND003 - 17/10/2019 09:00	Yes	17/10/2019 09:00	17/10/2019 13:00	Cirencester	6297	6297	Did not Attend

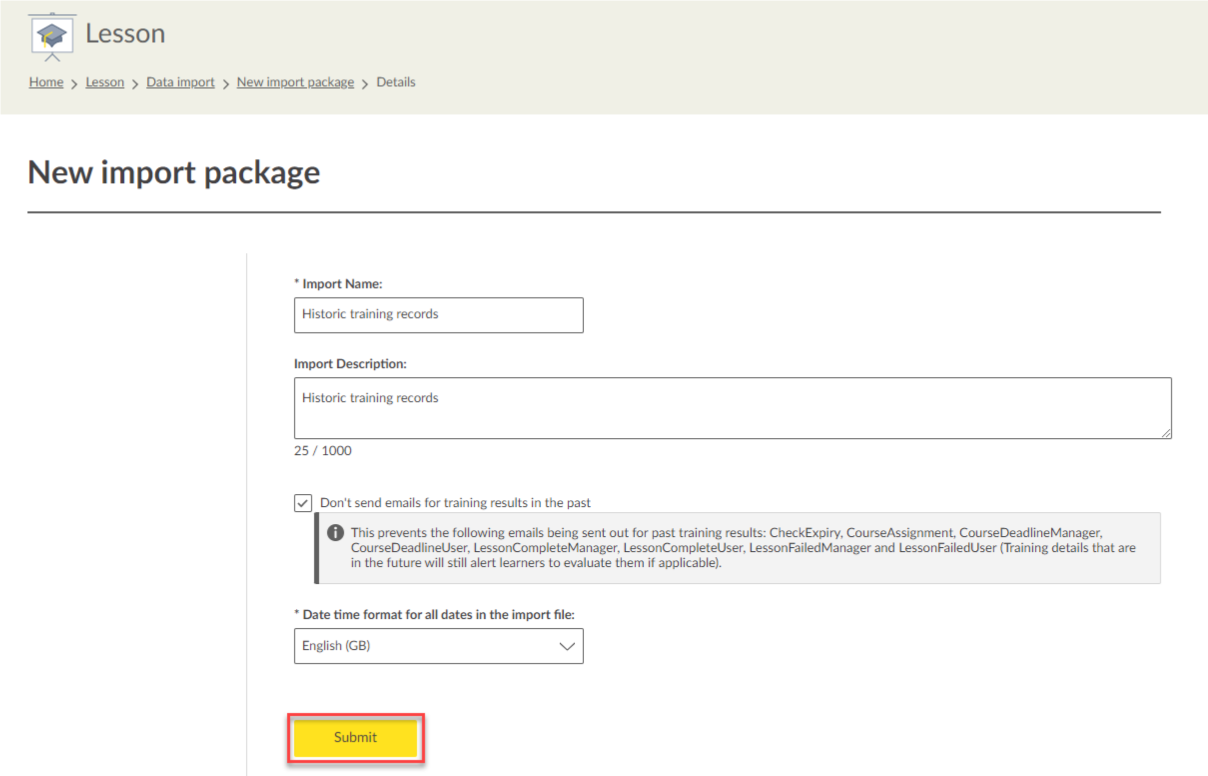
Import history for eLearning and Competency Check Lessons

1. **Navigate to the Data Import Wizard.** From the 'Courses' drop down menu, select 'Lesson' to navigate to the 'Lesson area. Select 'Import'. This will open the Data Import Wizard:

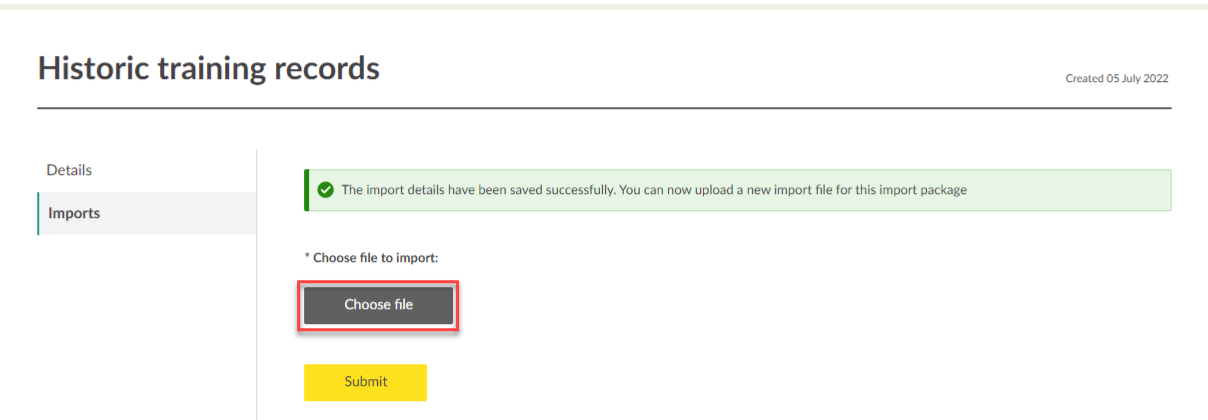


2. **Specify the properties of the import**. Select 'New'. Enter a unique name and description for the import. This enables the import to be easily repeated at a later time. In this example, the 'Don't send emails for training results in the past' is selected. This option prevents the specified email notifications being sent for

historic training records. Select ‘Submit’ to continue:



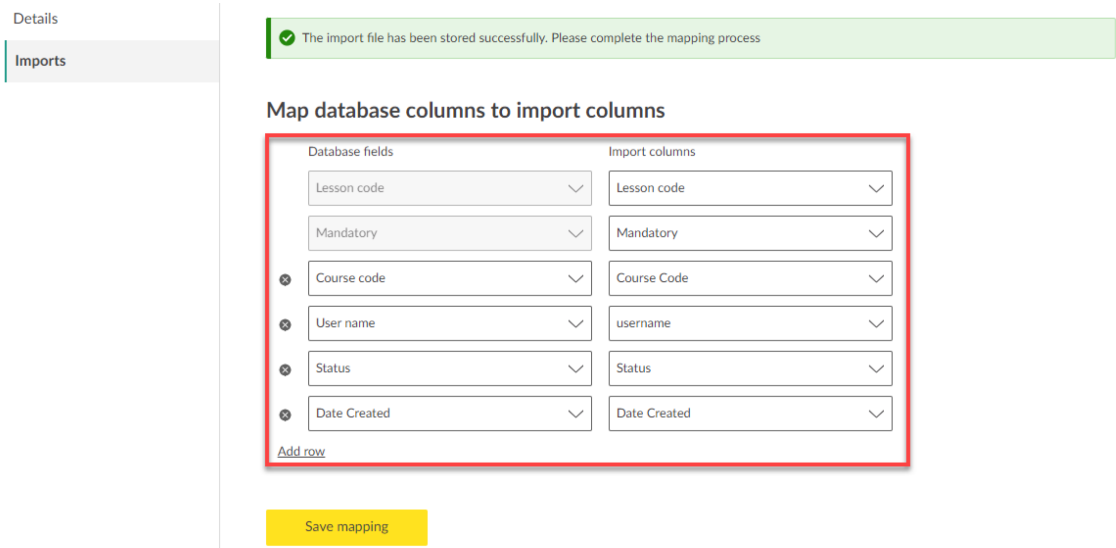
3. **Browse and upload the import spreadsheet.** Select ‘Choose File’. Browse to the import spreadsheet and select to upload. If the import spreadsheet contains multiple sheets, an additional prompt to select the correct sheet will appear. Select ‘Submit’ to continue:



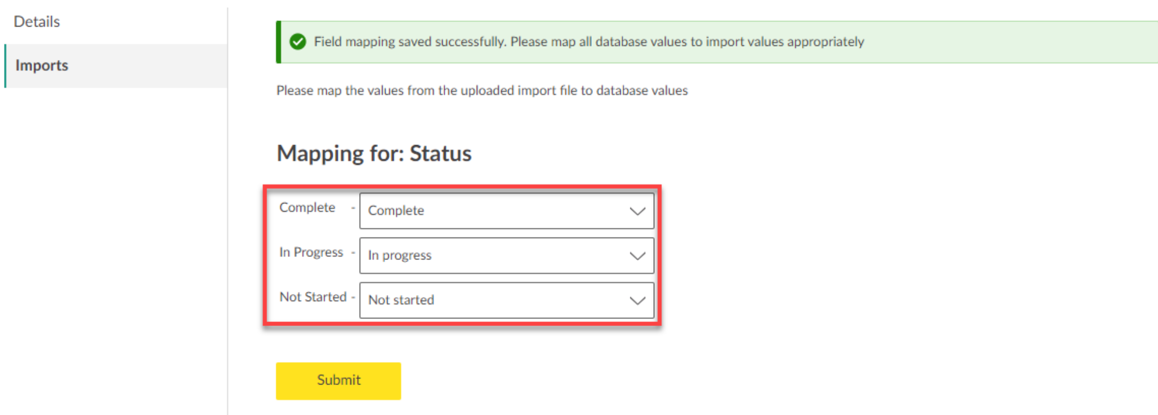
4. **Map the spreadsheet columns to database fields in Learn.** The Data Import Wizard will now list the columns in the import spreadsheet, alongside the available database fields in Learn. The fields can now be mapped. Through this process, each field in the import spreadsheet is matched to the corresponding field in Learn (into which the data will be inserted). Map the database fields, select 'Save mapping' to continue:

   Note:

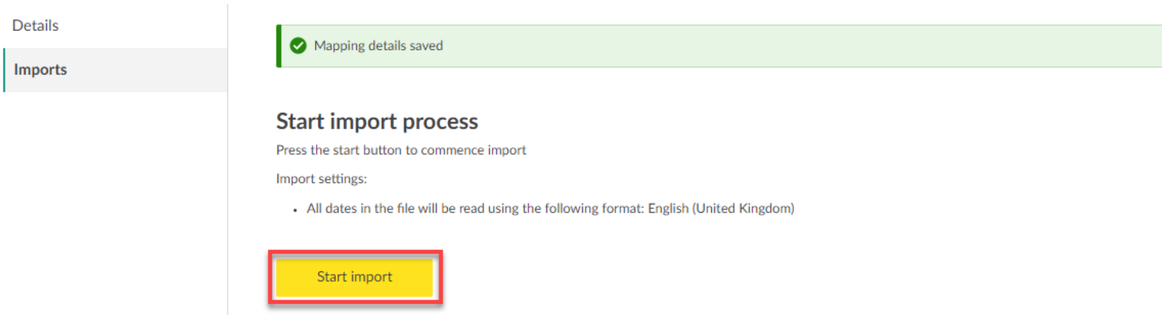
   - *Import columns can be mapped multiple times. Database columns can be mapped only once.*
   - *Learn will automatically map fields where the column / database names match*
   - *Select the X to remove mappings. Select 'Add row' to add mappings*



5. **Map the Status values to the corresponding values in Learn.** The Data import Wizard will now list the statuses found in the import file, for example, 'Complete' or 'Exempt' (see the 'Lesson Statuses' section of this guide (p6) for more information about available statuses). The Data Import Wizard will attempt to match the statuses in the import file, with a status in Learn. Review this mapping and make changes if required. Select 'Submit' to continue:



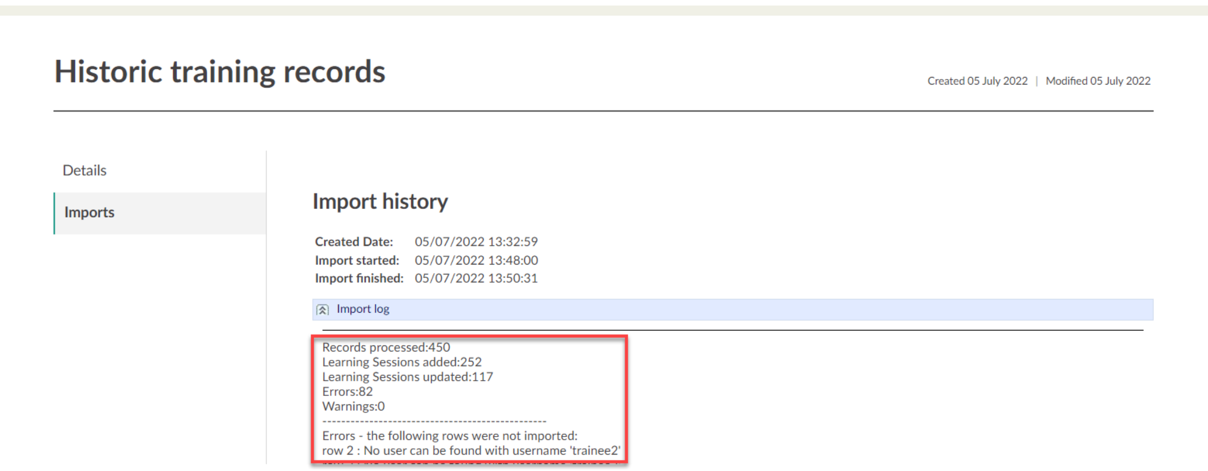
6. **Run the import.** Mappings are saved at each step of the import, and can therefore be edited if required. If all mappings are satisfactory, select 'Start Import' when to continue. A progress bar will indicate time remaining until the import is complete, and the 'Start import' button is replaced with a 'Stop import' button. If stopped, the import will continue to process the current row in the import spreadsheet before interrupting the import:



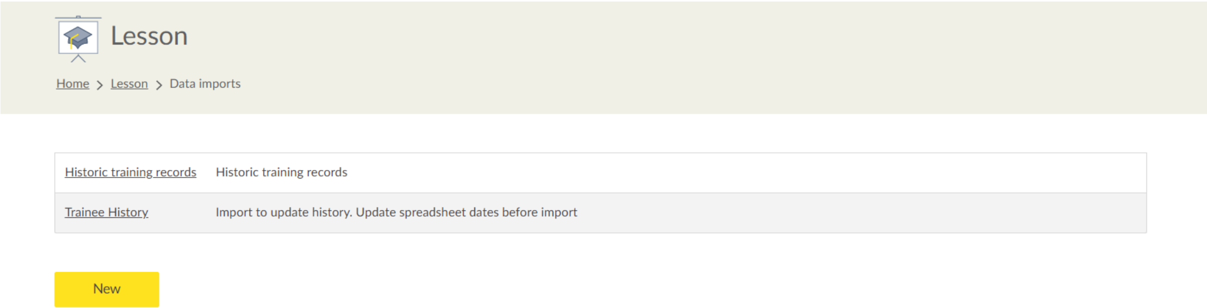
7. **Review the import**. Once the import is complete, select 'View Results' to see a summary of the import. It will contain the following details:

Records processed	The total number of rows containing data
Successfully processed records	The number of data rows imported successfully
Errors	The number of rows which failed to import
Warnings	The number of rows imported, but with partial failure

In this example, 82 errors are noted. The reason for each error is then listed below. In this example, the errors are because the Username in the import file does not exist in Learn:



8. **Repeat the import.** The required actions are performed, and the import is complete. The import mappings are saved, and the import can be repeated at a later time:



Import history for Events

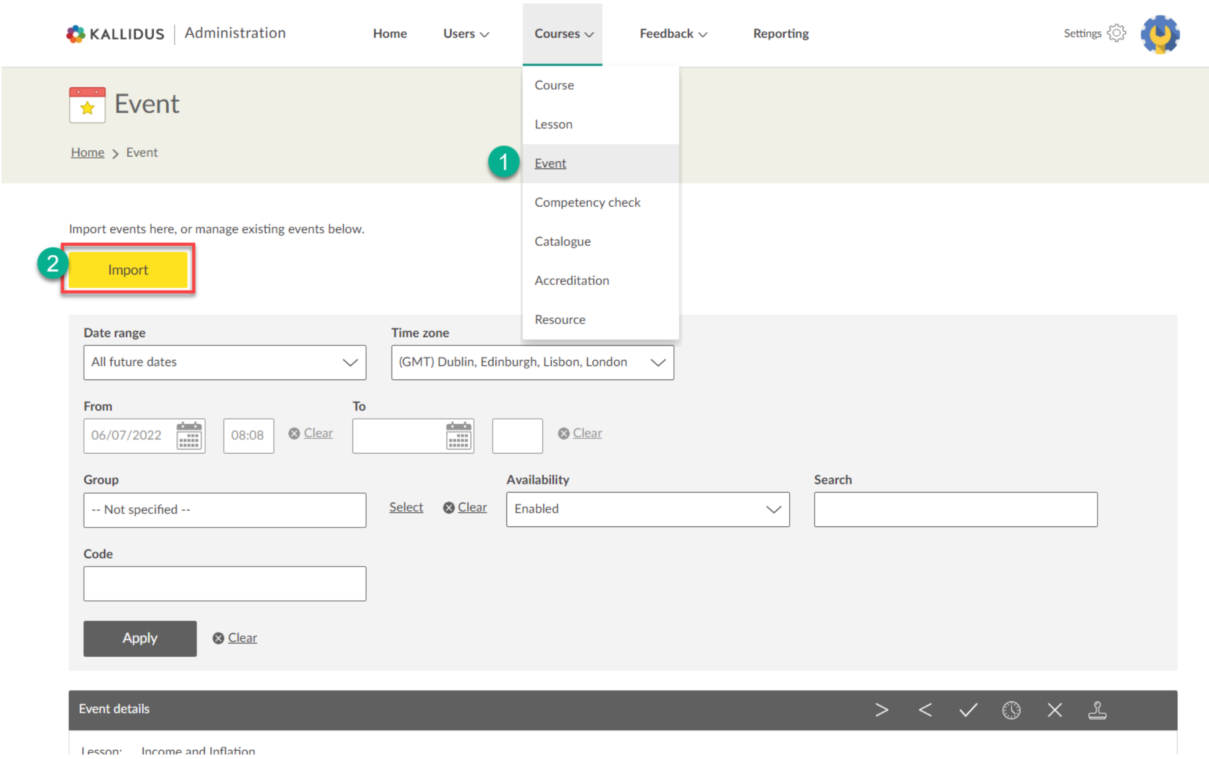
The following steps show how to bulk import training records for an Event. When a User is marked as attended for an Event, a status of ‘Complete’ will be given to the associated Instructor-led lesson.

Users and Lessons referenced in the import file must exist in Learn for the import to function. However, if an Event does not exist then it will be created if enough information has been supplied.

The basic process described in the below steps describe how to import training history for historic Events. However the Event import process can also be used to mark attendance in bulk, book Users onto future events, and create a schedule of future events. For more information, see the ‘Bulk actions with Event Import’ section of this guide (p22).

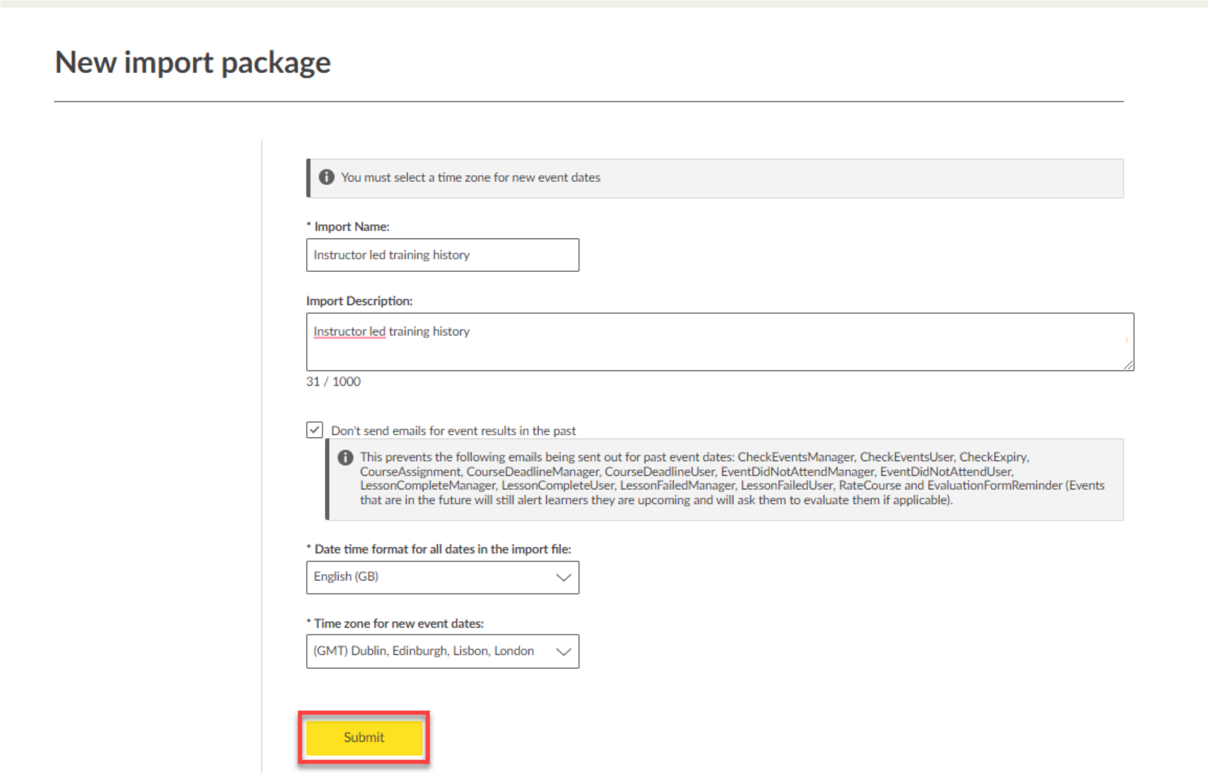
The below steps describe the basic process for importing data via the Event Import Wizard:

1. **Navigate to the Data Import Wizard.** From the ‘Courses’ drop down menu, select ‘Event’ to navigate to the ‘Event’ area. Scroll to the end of the page and select ‘Import’. This will open the Data Import Wizard. Select ‘New’ to create a new import:

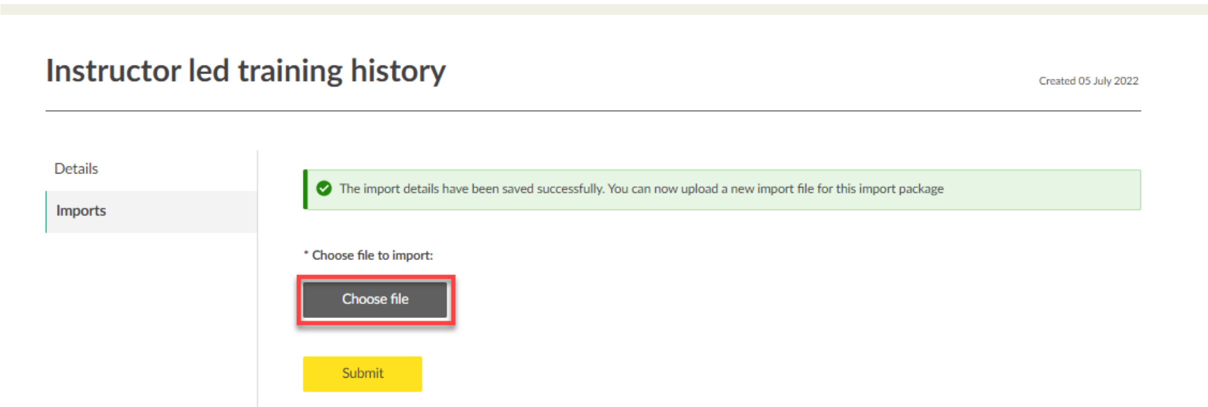


2. **Specify the properties of the import**. Enter a unique name and description for the import. This enables the import to be repeated easily at a later time. In this example, the ‘Don’t send emails for training results in the past’ is selected. This prevents the specified email notifications being sent for historic training records.

Select ‘Submit’ to continue:

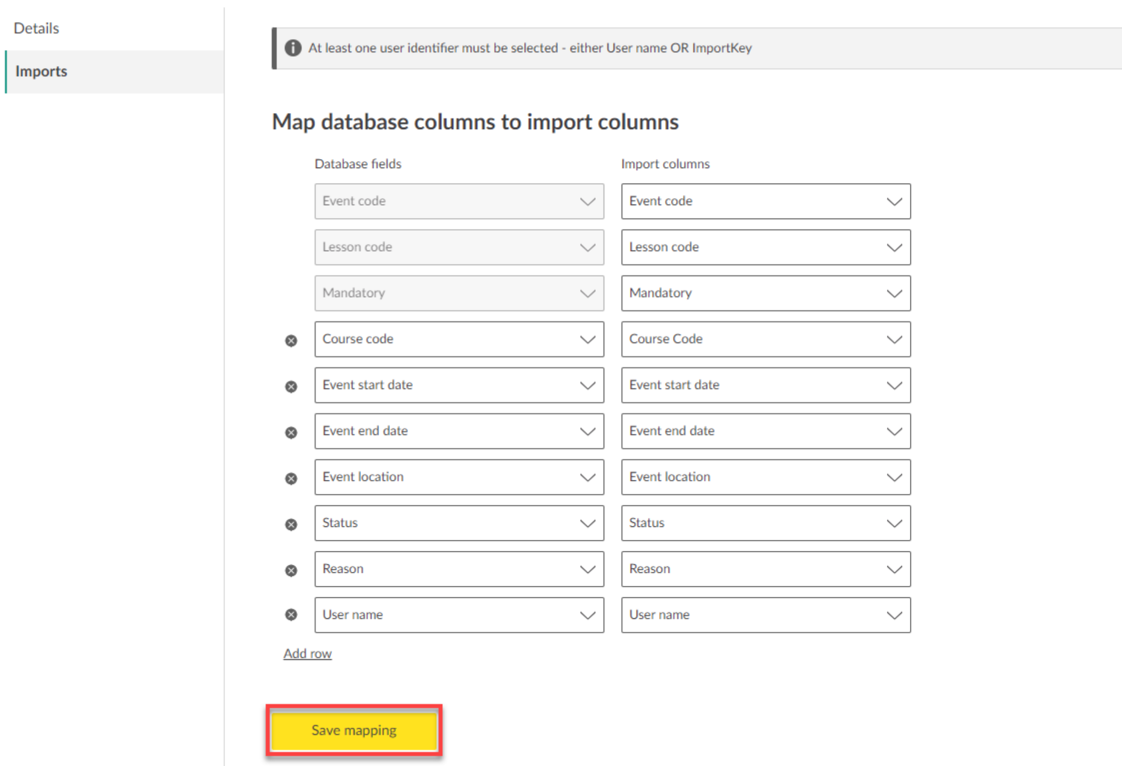


3. **Upload the import spreadsheet.** Select ‘Submit’ to continue. Select ‘Choose File’, browse to the import spreadsheet, and select the file. If the import spreadsheet contains multiple sheets, an additional prompt to select the correct spreadsheet will now appear. Select ‘Submit’ to continue:

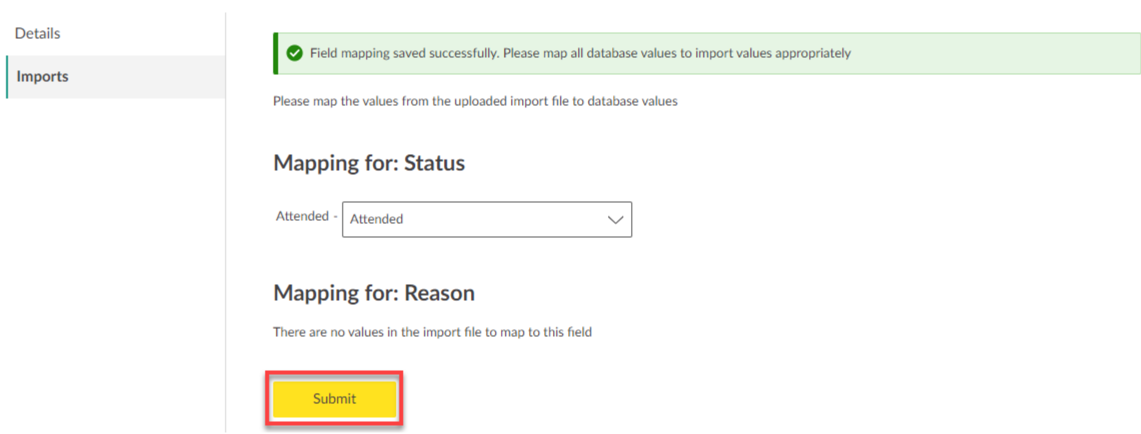


4. **Map the spreadsheet columns to database fields in Learn.** The Data Import Wizard will now list the columns in the import spreadsheet, alongside the available database fields in Learn in order that they can be mapped. Through this process, each field in the import spreadsheet must be matched to the

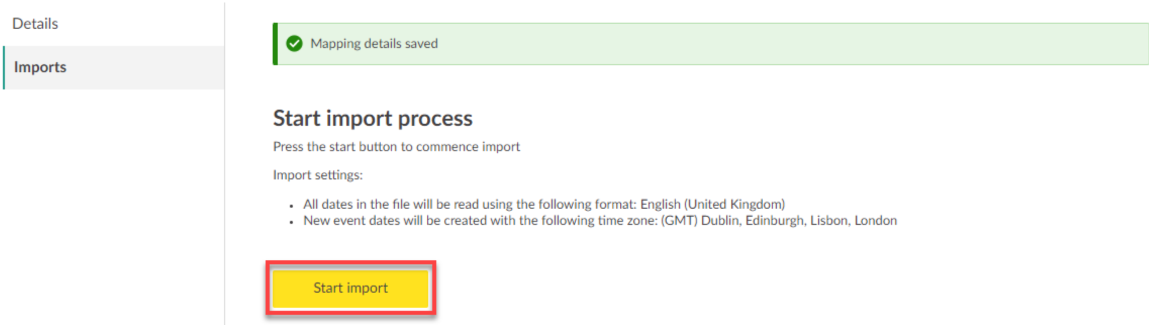
corresponding field in Learn (into which the data will be inserted).



5. **Map Reasons (if included).** 'Reasons' can be added for imported Event statuses, for example reasons for non-attendance (see the 'Statuses for Instructor led Lessons' section of this guide (p7) for more information about Reasons). If Reasons are included in the import template, the Data Import Wizard will require these to be matched with corresponding Reasons in Learn. Select Submit to continue:



6. **Run the import.** Mappings are saved at each step of the import and can therefore be edited if required. If all mappings are satisfactory, select 'Start Import' to continue. A progress bar will indicate time remaining until the import is complete, and the 'Start import' button is replaced with a 'Stop import' button. If stopped, the import will continue to process the current row in the import spreadsheet before interrupting the import:



7. **Review the import**. Once the import is complete, select 'View Results' to see a summary of the import. It will contain the following details:

Records processed	The total number of rows containing data
Successfully processed records	The number of data rows imported successfully
Errors	The number of rows which failed to import
Warnings	The number of rows imported, but with partial failure

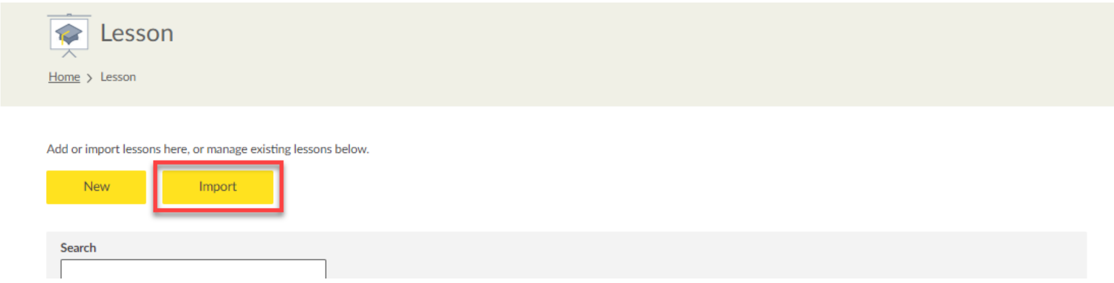
8. **Close and finish.** The required actions are performed, and the import is complete. The import mappings are saved and the import steps can be more quickly followed next time. Individual mappings can still be changed.

View previous history imports

The content and mappings of any previous Lesson and Event import can be reviewed, and the datafile can be download if required.

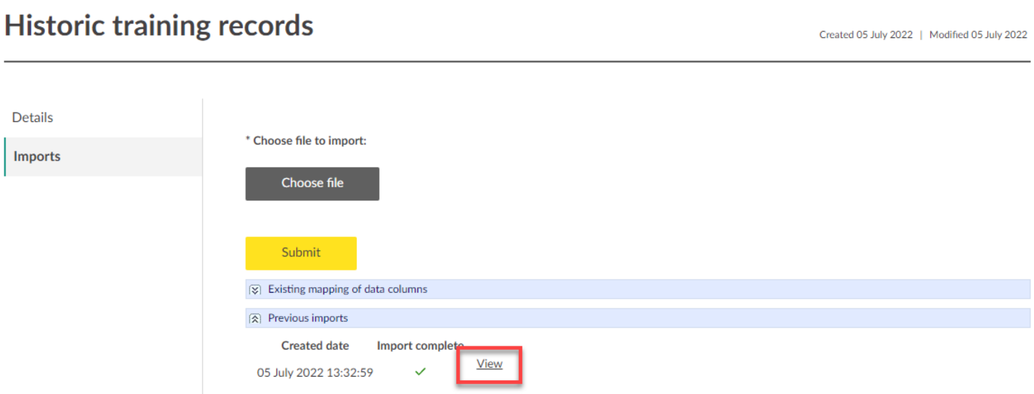
1. **Navigate to the Data Import Wizard.** Navigate to the 'Lesson' or 'Event' area. Select 'Import'. This will open the Data Import Wizard:

   Lesson import :



   Event import:

2. **View import history.** Select 'Imports'. The resulting screen details the existing data mapping for each import and lists all previous occasions on which the import has been run. Select 'View' to see and download a previous import. Select 'Continue' to restart an import from the point at which it was last saved:



Considerations for importing training history for accredited Lessons

The overnight batch processor will automatically update accreditation statuses based on the imported results.

For both Fixed and Continuous Accreditations it is essential that Accreditations are set up *before* the Lesson results are imported.

Visit The Academy for more information about configuring and reporting Accreditations:

- Become a pro: Learn (Lesson 11)
- Learn: the repeat training cycle
- All things compliance
- Reporting for beginners

Bulk actions with Event imports

The Data import wizard was designed to import historic training records, however it can be used to perform other bulk actions, and save administrators time. Three of the most common uses are described below.

Mark attendance for multiple Users

If all Event attendance is saved in a spreadsheet format, this can be imported into Learn to update attendance for multiple Users. This can be much quicker than marking attendance for individual Events.

Update the import spreadsheet following this rule then follow the Event import process as described in the 'Import Event history' section of this guide (p16):

	F	G	H	I	J	K
date	Event end date	Event location	Import Key	User name	Status	Reason
09:00	15/10/2019 13:00	Cirencester		john.collins	Attended	
09:00	16/10/2019 13:00	Cirencester		ben.walsh	Cancelled	work commitments
09:00	17/10/2019 13:00	Cirencester		sue.jones	Did not Attend	sickness

Note: Evaluation forms will not be triggered when attendance is marked via this method. If this is required, mark 'non attended' in via the import, then set all remaining statuses at Event level.

Book multiple Users onto future Events

If the Event date is a future date, and if the status column for each User is blank, then the import process will:

- create new future Events (if the Event does not exist)
- book Users onto the future Events

Update the import spreadsheet following this rule then follow the Event import process as described in the 'Import Event history' section of this guide (p16):

	F	G	H	I	J	K
t date	Event end date	Event location	Import Key	User name	Status	Reason
20 09:00	15/10/2020 13:00	Cirencester		john.collins		
20 09:00	16/10/2020 13:00	Cirencester		ben.walsh		
20 09:00	17/10/2020 13:00	Cirencester		sue.jones		

Note:

- All new Events will inherit the Event defaults specified for the Lesson.
- When booking Users on to Events via the import method, the 'BookingBookedUser' notification will not get sent automatically. However, this can be manually triggered. View Bulk book Users onto Events in The Academy to see how.

Create future Events

As described above, Learn will create new Events and book Users straight onto those Events where the status column in the import spreadsheet is left blank.

This example takes that process a step further and creates multiple future Events onto which only one User is booked – a dummy (or test User). Once the import is complete, the dummy user can be unenabled or deleted, thereby removing them from all Events onto which they are booked.

This can be a real time saver, as it allows you to quickly and easily create any number of future events, on any schedule.

Update the import spreadsheet following this rule then follow the Event import process as described in the 'Import Event history' section of this guide (p16):

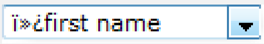
	F	G	H	I	J	K
rt date	Event end date	Event location	Import Key	User name	Status	Reason
20 09:00	15/10/2020 13:00	Cirencester		dummy.user		
20 09:00	16/10/2020 13:00	Cirencester		dummy.user		
20 09:00	17/10/2020 13:00	Cirencester		dummy.user		

All new Events will inherit the Event defaults specified for the Lesson. Remember to Unenable the dummy users once the import is complete, to remove them from all the Events created by the import. When reenabled, the dummy user will not be rebooked onto the Events.

Troubleshooting data import

If there are errors in the import log, the import isn't behaving as expected or isn't working at all, here are some of the potential problems and fixes:

Problem	Potential Solution
Error message when uploading data file: *'The new file has a different amount of columns from the original definition. Please create a new import for this file.'*	If you are sure you are uploading a file with the same column structure as the original file used to create the definition (you can check this by viewing a previous import and downloading the import file), then the most likely cause is an errant comma within the file which is affecting the column structure. Also in spreadsheets it can be possible to have character data into the columns which looks blank to the user (normally if columns have been selected and the user has chosen to 'Clear contents'). To see if this is the case you can export the spreadsheet as a csv file and see the extra columns – normally as extra commas at the end of each line. The best way to remove these is to highlight the whole column in the spreadsheet application and then right select and select 'Delete'.
Warning message in the log file: *'The row in the import file is blank and has been ignored'*	Sometimes files can have blank rows which contain character data which the import recognises but looks blank to the user. If you are importing a xls or xlsx file, then highlight the entire row by right selecting on the row number and then choose 'Delete' from the menu. Run the file again to see if the warnings have disappeared. If the file is a csv or txt, open in a text editor such as notepad and make sure the blank rows have no blank characters, and remove them if possible. It is best if the end of the file is when the cursor is at the end of the last line in the import.
When importing a file, the column mappings show 'F' numbers in the Import columns	This means that the import file has more columns somewhere than header columns. Therefore, either a column header has been missed or there is more data in the file for one (or more) rows then for all the others. Again the most common cause for this is errant commas in the data. Also in spreadsheets it can be possible to have character data into the columns which looks blank to the user (normally if columns have been selected and the user has chosen to 'Clear contents'). To see if this is the case you can export the spreadsheet as a csv file and see the extra columns – normally as extra commas at the end of each line. The best way to remove these is to highlight the whole column in the spreadsheet application and then right select and select 'Delete'.

Error in import log: *'[import type] record has not been updated successfully'*	This means that an error has occurred whilst trying to save the record, but the error is unknown to the import utility. To discover more information about the possible errors, consult the windows application log. One potential reason is that the MSDTC (Microsoft Distributed Transaction Coordinator) service is not running on the database server. The import facility requires a transactional environment to perform the data import tasks, and if this service is not running then the transactions can fail.
When importing a .csv or .txt file, the names for import columns include characters that are not in the import file: 	This can happen when the data file has been saved in an encoding format other than ANSI. Please ensure all .csv and .txt files are saved with an encoding of ANSI.
When importing a spreadsheet, the import is complaining about date's being incorrectly formatted.	Applications like excel will automatically try and recognise date fields (this can be turned off by selecting the column > Format Cells > Choose 'Text' format). When the spreadsheet is imported, the dates will be imported using the **current User's** theme language, so if the current user is set to English (GB), then the dates will then be imported in that format. If the Data Import date format is then specified as something else i.e. English (US) – then this can cause the date format problems.

FAQ

What is an 'enrolled' User?
A User who has selected a course from a Catalogue, or has been assigned a Course (either directly or through group membership)

Can I edit import mappings next time I perform an import?
Yes. On each subsequent use of an import definition it is possible to alter the mapping configuration. The amended mappings will be applied next time the import is run.

If the new import file has a different columns then the previous import, then the Data Import Wizard will prompt the administrator to re map the fields. If the import file has exactly the same column definition, then the current mappings will be shown to the user and an option is given to either edit the mapping or continue without editing.

Does a User have to be assigned to a Lesson for the Event?
Not necessarily. If a User has not already been assigned to a Lesson for the Event, the import tool will attempt to do so, but may require additional information to assign the User to the correct Course historically. When that happens, the Lesson details will then appear in the User's training reports, but not in their learning plan. See data import rules for more information.

What does the certified date in a training record mean?
This is now a redundant feature, soon to be removed from Learn.

Do I need to assign a Lesson to a Course?
No. If a Course is not assigned to the Lesson then Learn will try and do it.

What happens if the User for whom history is imported is not assigned the learning?
Where a User has not already been assigned to a Lesson, the import tool will attempt to do so, but will potentially require additional information to assign the User to the correct Course historically. The Lesson details will then appear in the User's training reports, but not in their learning plan.

I don't want Learn to assign the Course to Users. How can I avoid that?
Learn will attempt to assign a Lesson to a Course, and the Course to a User but this can only happen if the Course code is included in the import. Therefore to avoid this, exclude the Course Code from the import (note course code not mandatory unless a lesson is assigned to multiple courses.)

Do all assignments beforehand, then exclude the course code from the import so it won't try and assign the course to User. Imagine a multiple lesson course which is not assigned to a user. If one of the lessons has history imported it will assign it to user, which you may not want. Don't want training history to inadvertently and unexpectedly assign training. So don't import course code.

What date format for file import? What drives this?
Select a **format for all dates** in the import file. This will dictate how dates in the file are processed. Any dates which do not conform to the date format specified will cause the row which is being imported to fail.

Can I import multiple records for an individual User?
No. An imported file may contain only one record for each User, for each Lesson. The imported history will overwrite any and all existing training records for each User, for the specified Lesson.

If I import history for Lessons contained within an elective set, will the set be updated?

Yes.