LMS USER GUIDE
BATCH UPLOADING OF LEARNERS

INFORMATION – The batch upload feature is designed to allow bulk creation of learners to an organisation on the Training Management System and it is a complex operation, which should only be used by experienced IT staff/ administrators. It is vital that accurate information is uploaded to the system, as you would need to delete any wrongly uploaded learner records individually. It is strongly recommended that a small batch of records be uploaded first to verify the data before uploading records in bulk. Because of the intensive processing carried out by this task, we would recommend that no more than one hundred users be loaded from any one file.

There are two main stages in uploading batches of learners to the system:

Step 1, the individual learner record details need to be created. This can either be done by

a. Listing the full learner details onto the Batch Upload Template (Excel Spreadsheet)
This is generally used for organizations training their staff as full learner details are usually available.

b. Generic Logins where the names and other details about the learners are not known at the outset and need to be edited as and when the login details are allocated to learners
An example of where generic logins are useful is when learners have been invited to an e-Learning training session but until the day of the event there is uncertainty as to exactly who the delegates will be.

Step 2, the new learner details are uploaded to the Training Management System. During this second stage you can also

c. allocate training material (via Groups)

d. send automated emails with login details to learners (only applicable to learners uploaded via Batch Upload Template)

Please Note:
- Each batch will apply to an individual organisation, so if you do have learners to upload to more than one organisation then these need to be done as separate batches.
- If allocating training material the relevant groups need to have been set up beforehand
- Batch uploading should only be attempted by experienced IT Staff/Administrators.

BATCH UPLOADING USING THE UPLOAD TEMPLATE EXCEL FILE

1) Navigate to Batch Upload using the relevant procedure for your level of access as shown below	
Section Admin Procedure	Section Admin Dashboard>Batch Upload
Organisation Admin Procedure	Organisation Admin Dashboard>Batch Upload
Organisation Admin Basic Procedure	Organisation Admin Basic Dashboard>Batch Upload

STEP 1 – CREATING THE INDIVIDUAL LEARNER RECORDS

2)	Select the correct organisation from the crop down list (This step only applies to Section Administrators)	
3)	You will need to enter the relevant Department information onto the template, so to view the parameter details for the organisation that you have chosen select "**View TMS Parameters**"	

4)	You can then click on the links to see the relevant information for the organisation
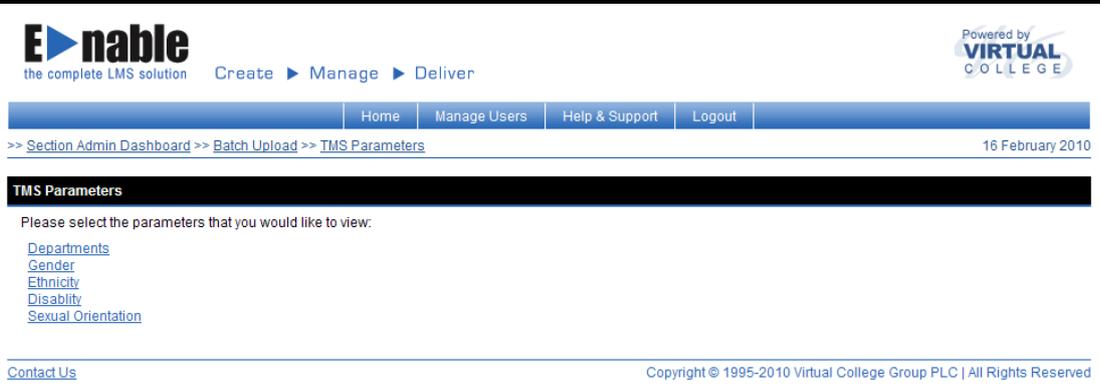
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>> Section Admin Dashboard >> Batch Upload >> TMS Parameters   16 February 2010

TMS Parameters

Please select the parameters that you would like to view:

Departments
Gender
Ethnicity
Disablity
Sexual Orientation

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Example of TMS Parameters for an organisation that has 12 departments, are categorising users in terms of Gender, but not Ethnicity

Departments		**Gender**		**Ethnicity**	
ID	**Description**	**ID**	**Value**	**ID**	**Value**
8783	EA-HEA Demo	0	Unknown / Refused	0	Unknown / Refused
8784	EA-HOU Demo	5547	Female		
8785	EA-LHA Demo	5546	Male		
8786	EA-SGC Demo				
8787	VC NHS Trust				
8788	VC PCT				
8789	VC Housing Association 1				
8790	VC Housing Association 2				
8792	VC Hospital 1				
8793	VC Hospital 2				
8794	VC LSCB 1				
8795	VC LSCB 2				

5)	Select **Download Upload Template**, save the file and then open it
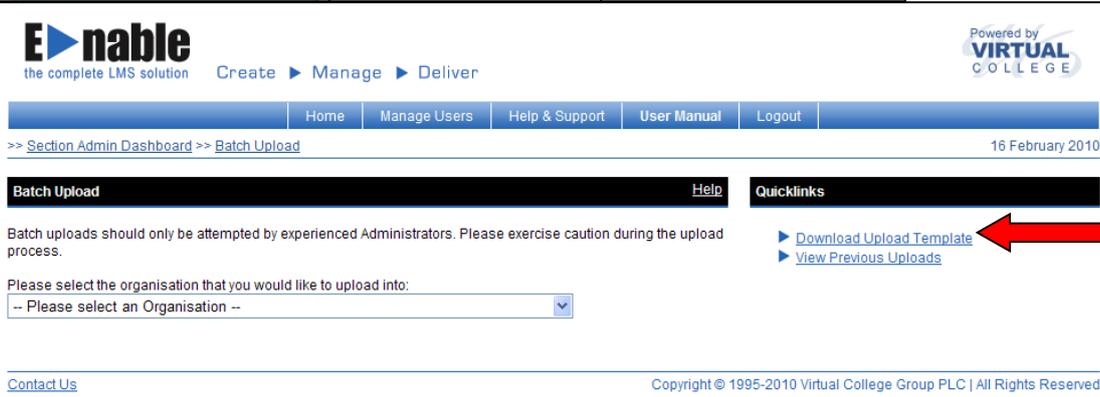
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>> Section Admin Dashboard >> Batch Upload   16 February 2010

Batch Upload   Help   **Quicklinks**

Batch uploads should only be attempted by experienced Administrators. Please exercise caution during the upload process.

▶ Download Upload Template
▶ View Previous Uploads

Please select the organisation that you would like to upload into:
-- Please select an Organisation --

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6)	You are now ready to enter the relevant details onto the template Please see the following Batch Upload Template Parameter Information for advice	The following is an example of the file format to be loaded. All mandatory fields are shown in dark green, the ones we also advise to fill in are in light green. The details entered onto the spreadsheet will take priority over any fields that can be automatically generated by the system (such as the userID or password) during the batch upload process.

Batch Upload Template Parameter Information

User ID
Optional – You can fill this in yourself, if not the TMS will fill this in automatically to a generic userid. It must be included on the input file as an alphanumeric field with a maximum length of 50 characters.

Password
Optional – You can fill this in yourself, if not the TMS will fill this in automatically to a generic password. It must be included on the input field as an alphanumeric field between 6 and 50 characters long.

First Name
Mandatory – must be included on the input file as an alphanumeric field with a maximum length of 50 characters.

Surname
Mandatory – must be included on the input field as an alphanumeric field with maximum length of 50 characters.

Initials
Optional – can be included on the input file as an alphanumeric field with a maximum length of 50 characters.

DOB
Optional – can be included in the format dd/mm/yyyy. If you leave this field blank, then the system will use the default value of 01/01/1910.

Title
Optional – If you leave this field blank, then the system will use the default value of "Mr".
Any of the following titles can be entered in EXACTLY the same format – as shown below. For example the system will not recognise "Mrs." – and will substitute the default value of "Mr"

Mr
Mrs
Miss
Ms
Dr
Professor
Rev
Capt
Cllr
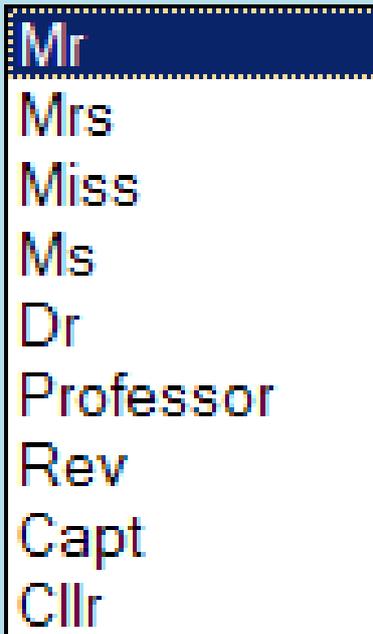
Email
Mandatory – must be included on the input file as an alphanumerical field with a maximum length of 255 characters. If a learner does not have their own email address then an alternative email address (such as that of the user's line manager or a generic email address) can be entered.

Manager
Optional – if your organisation does allocate Managers to individual learners, then the relevant Managers must already be set up on the system prior to batch uploading their learners. When completing the batch upload template the Manager's first name and surname (EXACTLY as they appear on the TMS) need to be entered in the format "Sue Butler" onto the template.

Department
Mandatory – the system will accept the department number as shown on the TMS Parameters List (most users find this the best method). If you decide to use the department number, then all records must include

the correct department number. Alternatively, the name of the department can be entered, but if you do decide to type in the department name, then this needs to be typed in EXACTLY as it appears on the TMS for all records. Please note: The system will not upload all records if a mixture of numbers and names is used.

CONTACT DETAILS
If the organisations address has already been set up on the system, then there will be an option to use this at the next stage of the batch upload process. Therefore, if you know that this is the case – you do not need to complete the address or telephone number fields on the template.

Address 1
Optional for batch upload (but is a **required field** which will need to be entered manually at a later date if not included during the batch upload process). Therefore Address 1 should be included on the input file as an alphanumeric field with a maximum length of 100 characters.

Address 2
Optional – can be included on the input field as an alphanumeric field with a maximum length of 100 characters.

Town
Optional – Can be included on the input field as an alphanumeric field with a maximum length of 50 characters.

Postcode
Optional for batch upload (but is a **required field** which will need to be entered manually at a later date if not included during the batch upload process). Therefore, a postcode should be included on the input field as an alphanumeric field with a maximum length of 10 characters.   The organisation's postcode or a dummy postcode (such as "Unknown" can be entered).

Country
Optional - Can be included on the input file as an alphanumeric field with a maximum length of 50 characters

Telephone
Optional - Can be included on the input file as an alphanumeric field with a maximum length of 25 characters

Job Title
Optional – if your organisation is using job titles, then the relevant title can be entered. Please take care to enter any existing Job Titles in EXACTLY the same format they appear on the TMS as the batch upload process will add new Job Titles if they do not already exist. For example it will cause problems if there is already an "Administrator" Job Title on the System and a Job Title is abbreviated to "Admin." on the Batch Upload Template as this will create a second department.

Expiry Date
Optional – can be entered in the format dd/mm/yyyy. The learner will not be able to access the system from the date entered.

Gender / Ethnicity /Disability / Sexual Orientation
Optional – even when organisations are classifying their learners in terms of Gender, Ethnicity, Disability or Sexual Orientation, they generally expect the learner to enter this information themselves. However, if you do enter any of the Diversity fields onto the batch upload template the system will accept the details as shown on the TMS Parameters List. If you decide to use the relevant numbers (most organisations find this the best option), then all records in a column must include the correct number. Alternatively, the relevant names can be entered, but if you do decide to type in the names, then these need to typed in EXACTLY as they appear on the TMS for all records in a column. Please note: The system will not upload all records if a mixture of numbers and names are used in the same column.

Please note – although diversity fields appear on the standard Batch Upload Template, not all organisations have access to Diversity features of the TMS (which can be purchased as an optional extra).

7) Once the spreadsheet is filled in correctly and saved, you can upload the details to the LMS 8) Ensure that the correct organization is selected (this step only applies to Section Administrators) 9) Use the **Browse** to locate the file to upload 10) Select **Upload**	
11) Select **Continue**	The following screen will appear
12) Complete the details Please see the following Batch Upload Default Form Information for advice 13) Select **Submit**	

Batch Upload Default Form Information

User Name
If you have entered a username on the batch upload file this is what will be uploaded.

If this is not the case the system can generate one automatically and you have the following 2 formats to choose from:

        Construct from Name (forename.surname)
        Construct from Email Address
        Tick the relevant box to make your selection.

Password
If you have entered a password on the batch upload file this is what will be uploaded.

If this is not the case the options are:
- You can specify the password which will apply to all logins by typing this in the box
- You can choose random passwords by ticking the "Generate a Random Password" box
- If you have left both these options blank the system will set all passwords to "123qwe"

Address

If you have entered details onto the batch upload file, these will be uploaded. Although you can upload learners without completing the Address 1 and Postcode fields, these are both Mandatory Fields and the administrator or learner will be required to edit these fields when they access the learner record. You can enter the address details onto the form manually or tick "Use Organisation Address" so that the system will enter the details already stored on the system for your organisation (ensure you have already entered your Organisation address details – see separate instructions for Managing Organisations)

14) Check to ensure that the state of each record is **Valid**	You will then see a summary screen with the details of your learners and if everything is OK, the status will be **Valid** for every record	If the status of any record is **Error** (which means there is a problem on one or more of the fields on this record) or **Exists** (which means that the username already exists in the system) **you need to either edit these records or delete them**
15) If the status of any record is "**Error**" or "**Exists**" select the **Edit** link for the record		

16) You can then amend fields and select **Update Record OR** delete the record by selecting **Delete Record**. 17) Once you have amended any incorrect details and the "State" is **Valid** for all records, click on **Finish Edit** then **OK**	

18)	The list of available groups will appear, tick the relevant boxes if you wish to allocate training material as part of the batch upload process.	**Please note**: If you wish to allocate training material as part of the batch upload, the relevant groups need to have been set up beforehand. If the relevant group has **not** been created DO NOT PROCEED with the batch upload unless you are happy to allocate the training manually to each learner. If you abandon the upload, you can create the group before uploading the file again.
19)	When you are sure that your selections are correct, select **Insert Batch** then **OK**	

For row 18/19, the right cell contains an image:

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Confirm Batch Upload

Assign inserted users to Group(s):
☐ UHNS - 170909

[Insert Batch]

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20)	To obtain an Excel Spreadsheet containing the details of the batch, select **Generate Report**	Once the batch is uploaded you will see a summary of the batch.

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Batch Upload Completion Report

Batch Insertion Completed.

Number of records in batch: 2
Number of records inserted: 2
Number of records failed : 0

Review the batch report and move on to send login details to uploaded users

[Generate Report]   [Email Login Details]

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Example of Batch Upload Report

UserID	Password	FirstName	Surname	Initials	DOB	Address1	Address2	Town	County	Telephone	Email
vceapaulacres	Acres	Paul	Acres		01/01/1910 00:00	Virtual	Marsel House, Stephensons	ILKLEY	West	01943 605976	sue.butler@virtual-college.co.uk
vceacharleswalter	Walter	Charles	Walter		01/01/1910 00:00	Virtual	Marsel House, Stephensons	ILKLEY	West	01943 605976	sue.butler@virtual-college.co.uk
vceaisabelturner	Turner	Isabel	Turner		01/01/1910 00:00	Virtual	Marsel House, Stephensons	ILKLEY	West	01943 605976	sue.butler@virtual-college.co.uk
vceaannekenningha	Kenningha	Anne	Kenningha		01/01/1910 00:00	Virtual	Marsel House, Stephensons	ILKLEY	West	01943 605976	sue.butler@virtual-college.co.uk

Organisation	Manager	Department	ExpiryDate	EmployeeNumber	JobTitle	GroupAllocation	AssignedID	Result
VCeA		VC PCT	31/12/2100 00:00			[Data Protection in the	273083	Inserted
VCeA		VC Housing Association	31/12/2100 00:00			[Data Protection in the	273084	Inserted
VCeA		VC Hospital 1	31/12/2100 00:00			[Data Protection in the	273085	Inserted
VCeA		VC LSCB 1	31/12/2100 00:00			[Data Protection in the	273086	Inserted

Please note: The highlighted section, any errors would show in this column and you will also be able to see that the batch has been "Inserted". In some instances a record may fail to insert (for example if a username already exists in the system) and you then need to make the necessary amendment(s) to the problem record(s) before uploading them again

21) If you wish to email the learners with their login details, select **Email Login Details**	

22) If you wish to edit the message, select **Edit** 23) Amend the email as necessary, then select **Done** 24) Deselect any learners who should not receive the email 25) To send the message, select **Send** 26) Select Report to produce the email report	The send message screen appreas with your own login details in the message as an example. The message that is sent will contain the recipient's login details.

Example Report	Example of the message that the learner receives

27) Once the batch is complete, select **Done**	**E ▶ nable** the complete LMS solution Create ▶ Manage ▶ Deliver Powered by **VIRTUAL COLLEGE** Home Manage Users Help & Support Logout >> Section Admin Dashboard >> Batch Upload >> Edit Batch 14 July 2010 **Batch Upload Summary** **Edit User Details** *No items found.* *Please select an entry to edit.* Finish Edit Contact Us Copyright © 1995-2010 Virtual College Group PLC	All Rights Reserved

BATCH UPLOADING – GENERIC LOGINS

1) Navigate to Batch Upload using the relevant procedure for your level of access as shown below	
Section Admin Procedure	Section Admin Dashboard>Batch Upload
Organisation Admin Procedure	Organisation Admin Dashboard>Batch Upload
Organisation Admin Basic Procedure	Organisation Admin Basic Dashboard>Batch Upload

2)	Select the correct organisation from the drop down list (This step only applies to Section Administrators)	
3)	Select **Create Generic Logins**	

4) Complete the form Please see the following Generic Batch Upload Form Information for advice	**E▶nable** the complete LMS solution Create ▶ Manage ▶ Deliver Home | Manage Users | Help & Support | **User Manual** | Logout >> Section Admin Dashboard >> Batch Upload 06 November 2015 **Batch Upload** Help Generate Generic Logins *Start Index: [ ] *Number of Logins: [ ] UserID: [ ] ☐ Use Surname ☐ From Names (forename.surname) *Password: [ ] ☐ Use Surname ☑ Random ☐ Append Value *FirstName: [ ] ☐ Append Value *Surname: [ ] *Address1: [Virtual College] ☑ Use Organisation Address Address2: [Marsel House, Stephensons Way] Town: [ILKLEY] *Postcode: [LS29 8DD] County: [West Yorkshire] Country: [ ] Telephone: [01643 605976] *Department: [-- Please select a Department -- ▾] Manager: [-- None -- ▾] *E-Mail: [ ] Expiry Date: [31 ▾] [December ▾] [2100 ▾] [Generate] Accessibility Copyright © 1995-2015 Virtual College Group PLC | All Rights Reserved **Mandatory fields are marked with an *** **Generic Batch Upload Form Information** 1. ***Start Index** – the value you would like to start the generic logins with (i.e. 1 if starting afresh or 51 if you have generated 50 generic logins before) 2. ***Number of Logins** – the number of logins you would like to generate 3. **User ID** – you can enter a generic ID (i.e. VC or Ilkley) or opt for "Use Surname" or "From Names (forename.surname)" 4. **Password** – you can enter a generic password or opt for "Use Surname" or "Random". If you select "Append Value" then the index number for the record will be added as a suffix to the password. If the password field is left blank, then the password will automatically be set to the default value of "123qwe" 5. ***First Name** – for example, Learner / Student / Organisation ID could be entered here because generic logins are being created. You can then opt to "Append Value", this will then add the index number to the First Name (as well as the Surname) 6. ***Surname** – for example, the company name or an abbreviation of the company name could be used for generic logins. The index number is automatically added to the Surname 7. ***Address** – (Address 1 and Postcode are both Mandatory Fields) - you can enter the address details or opt for "Use Organisation Address" (ensure you have already entered your Organisation address details – please see separate instructions for Managing Organisations) 8. ***Department** – choose the relevant department from the drop down list (ensure that you have set up the departments in your organisation beforehand – please see separate instructions for Managing Organisations) 9. **Manager** – you can choose a manager if required (if your organisation is using the system's "Requested Learning" feature and your managers need to approve their learners training, then you do need to select the correct manager, otherwise this field is optional) 10. ***Email** – please enter a generic email address or the email address of the manager/administrator who will be responsible for the learners in the batch (most organisations allow their learners to edit their personal details so, if this is the case for your learners, they will be able to edit their email address after you have given them their login details) 11. **Expiry Date** - you can choose to enter an expiry date in instances that you would like the learner to finish the training before a certain date (please note that learners will not be able to access their training record after this date)

5)	Once you have entered the relevant details, select **Generate**	The following is an example of a completed form

STEP 2 – COMPLETING THE BATCH UPLOAD

The procedure for Generic Logins is the same as for that of Batch Uploading using the Upload Template Excel File, therefore, please follow steps 14 to 27 as detailed above

1) From the Dashboard, select **Batch Upload**

2) Select **View Previous Uploads**

3) To see details of an individual batch upload in an Excel spreadsheet, click on the view icon ⊘. You can then save the file for future reference