

Relias Learning - Learner Bulkload Spreadsheet

The Learner Bulkload Spreadsheet allows you to add users to the LMS site.

The columns in the spreadsheet correspond to the fields in the Learner Profile (See Examples tab and Data tab.)

Columns marked in WHITE (First Name, Last Name, User Name, and Password) are required.

Columns marked in BLUE are highly recommended.

Opening this Spreadsheet: When you open the spreadsheet, a dialog box asks if you want to enable macros. Always choose to enable macros. Macros are later used to save the Excel Spreadsheet in the required XML format (see **Saving this Document**, below). If you chose to disable macros when you opened this document, close it now and re-open it, remembering to enable macros. If you have Microsoft Office 2003 and do not get a dialog box when trying to open the file, go to **Tools/Macros/Security** and choose **Medium** as the security setting. You should get a dialog box the next time you try to open the file. If you have Microsoft Office 2007, when you opened the spreadsheet you should have seen a **security warning** banner across the top notifying that macros were disabled, click the **Options** button to enable them and/or change the settings of your excel program. To change settings, click on the link **Open the Trust Center** in the macros box and click the button to enable all macros. **Note:** You can save the file with any desired filename.

About the spreadsheet: This spreadsheet is organized into five worksheets (or tabs). You are viewing the first tab (**Instructions**) now. The second tab (**User Profile Field Definitions**) provides an overview of the information you will be entering, and tells you the type of text (and the maximum number of characters) that can be entered for each field when you are ready to enter the actual data. The third tab (**Examples**) provides examples of how the data should be entered. This page contains the same fields that are described in the Column Definitions worksheet, but you will note that the fields now correspond to columns that run horizontally across the page. Each row in the worksheet represents one learner's profile data and course information. The the fourth tab (**Data**) is where you should enter the actual data to be uploaded. The fifth tab (**Permission Levels**) provides details on the various user permissions

About the User Profile Field Definitions Page: The **Data Type** column indicates the type of data that can be entered in a given column (integer, text, varchar or datetime), followed by the maximum number of characters in parentheses. **Varchar** means alpha-numeric text can be entered. **Datetime** applies only to the Hire Date field (enter dates in MM/DD/YY format). **Leading Zeros.** If you enter a password, username, zip code, learner ID or any other field that begins with zero, you will need to enter a single quote character (') before the zero. Otherwise, the program will drop the zero(es) from the password, username, zip code, etc. Note: By adding the single quote, the program will also left-justify the text (will still upload correctly).

Changing the file name/saving the spreadsheet: When saving the spreadsheet, you will be prompted with a message indicating whether or not you would like to create the XML at this time. Choose "NO". Relias Learning will create the XML after receiving the spreadsheet from you and verifying the data. If you prefer to create your own file name, select **File -> Save As** from the menu bar. Upon selecting Save As, select "No" to XML creation question. Proceed to save the Excel spreadsheet with the new name.

Uploading the XML File: If you prefer to upload your own bulk load, make sure macros are enabled and the data is correct. From the menu bar, Select File -> Save. A message will appear asking whether or not you would like to create the XML at this time. Choosing "YES" will save the Excel Spreadsheet and create the XML file with the same name, in the same directory as this spreadsheet. Select "YES". The XML version of the document is the actual file that will be used in the bulk load process, not the .xls file. After you save the spreadsheet in XML format, you can upload the XML file to the database by logging on as an Administrator or Supervisor, and selecting Users in the top navigation bar. Select Import Users.

Browse for the XML file that you wish to upload, and click Upload. If the hierarchy id number (column AB) is not complete, the user information that you upload will not be assigned to any folder in the Hierarchy. (Note: you can later add any unassigned users to a folder by opening the folder in the Hierarchy and clicking the *Add Users* button. This action brings up a list of unassigned learners that you can select by name or by report filters and add to the hierarchy folder.)

Using the Bulk Load to update existing users: If you are using the bulk load to update existing users, remember that User Name is the unique identifier and all data on the bulk load associated with a User Name will be updated in the site. Therefore, you cannot change a User Name via the bulk load; the system will look at the bulk load for User Names and if the User Name does not exist, a new user will be created. However if the User Name already exists, all of that user's demographic data will be modified as per the bulk load. This includes password, one of the four required fields to do a bulk load.

Help completing and/or uploading the bulk load: Please check the Relias Learning resources for guides to assist you in completing the bulk load, checking it for errors and tips and tricks for how to set up the various columns of data to maximize your reporting. Relias Learning Support is also available to you for further assistance if needed. If you are currently in implementation, contact your project manager.