

PeopleFluent Learning

Data Import and Export Guide

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About this Document

Introduction

When integrating with or migrating from other systems, it is often necessary to be able to import and export data in bulk. This document discusses:

- The data object types that can be imported to and exported from PeopleFluent LMS.
- The required data formats.
- Support for scheduled imports and exports.

Document Information

This section lists any changes or updates that occur following initial publication.

Revision Information	
Revision Date:	April 25, 2024
Revised Document Version Number:	2.0
Details of Revision:	Initial publication.

Supported Object Types

Talent Suite supports the bulk import and export of the following object types:

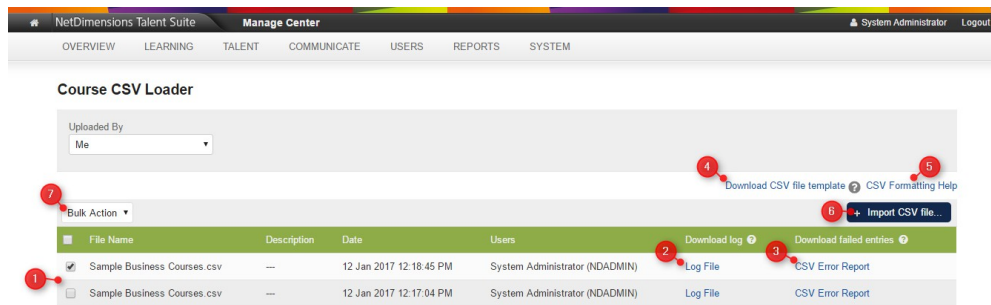
	Object Type	Export	Import	OPML Importer Task Type
1	Questions	R312	Question CSV Loader, Question QTI Loader	
2	Roles	R418	Role Access Data Loader	
3	Organizations	R132	Organization Data Loader	organizationsCsv
4	Users	R109	User Data Loader	usersCsv (ekpXml?)
5	User Profiles	R128	User Profile Data Loader	
6	User Groups		User Group Data Loader	
7	Job Profiles	R419	Job Profile Data Loader	jobProfilesCsv
8	Competencies	R420	Competency Data Loader	
9	Courses	R246/ R247	Course CSV Loader	courseCsv
10	Programs	R265	Program CSV Loader	programCsv
11	Catalog Assignments		Catalog Assignment CSV Loader	
12	External Training Records		External Training CSV Loader	externalTrainingCsv
13	Training Records		Training Records CSV Loader	trainingHistoryCsv (trainingHistory?, turboTrainingHistory?, trainingHistoryXML,)
14	Certificate Awards		Certification Awarding CSV Loader	certificationCsv
15	Token Accounts		Token Account Data Loader	
16	Equivalency Rules	R264	Equivalency Rule CSV Loader	
17	Competency Library		Competency Manager > Library	sfiaImport

18	Translated Content	XLIFF Export	XLIFF Import	
19	Competency Expiry	R135/ R136	Competency Expiry Loader	

Standard CSV Loaders General Information

For each CSV Loader there is typically a page in the LMS from where you can:

1. View an import history
2. Download Log File for a given upload
3. Download CSV Error Report for a given upload
4. Download a CSV file template
5. View CSV Formatting Help
6. Start an upload
7. Select uploads for bulk deleting



Each loader will also have a corresponding report to export data in the format recognized by the respective Loader.

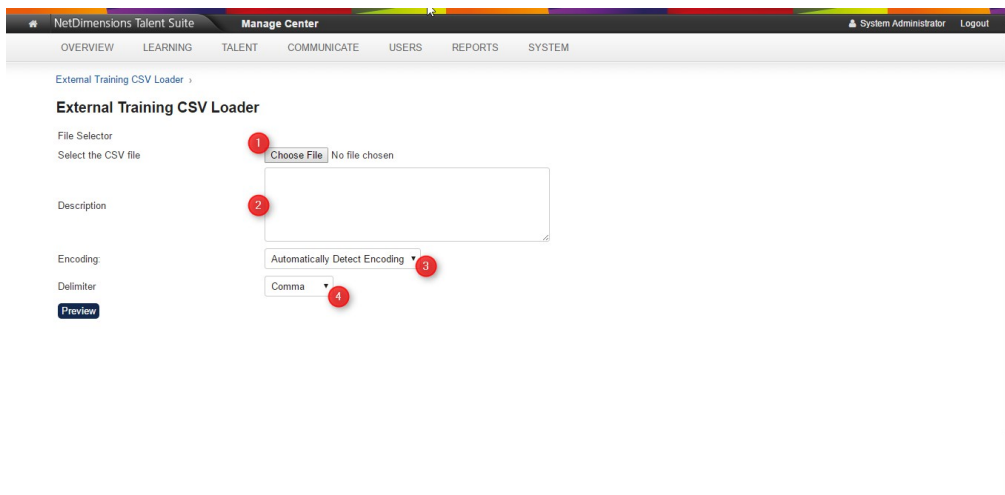
Preparing CSV Files for Importing

A recommended strategy is to set up a desired object, for example, a user or a course, through the UI, then use the relevant report to export the object to use as a template for the bulk creation of similar objects.

Note that .csv files are likely to be opened by Microsoft Excel if it is installed on your system. If you encounter any problems with importing a CSV file, it could be caused by Microsoft Excel applying extra formatting to the file. Ideally, the .csv file should be modified using a text editor instead of Microsoft Excel. The data should conform to the formatting required by the template as specified in the corresponding CSV Formatting Help. Do not insert commas as these will cause subsequent data to be treated as a separate column.

Importing Files

Go to the Loader appropriate for your data import and click the "Import CSV File" button.

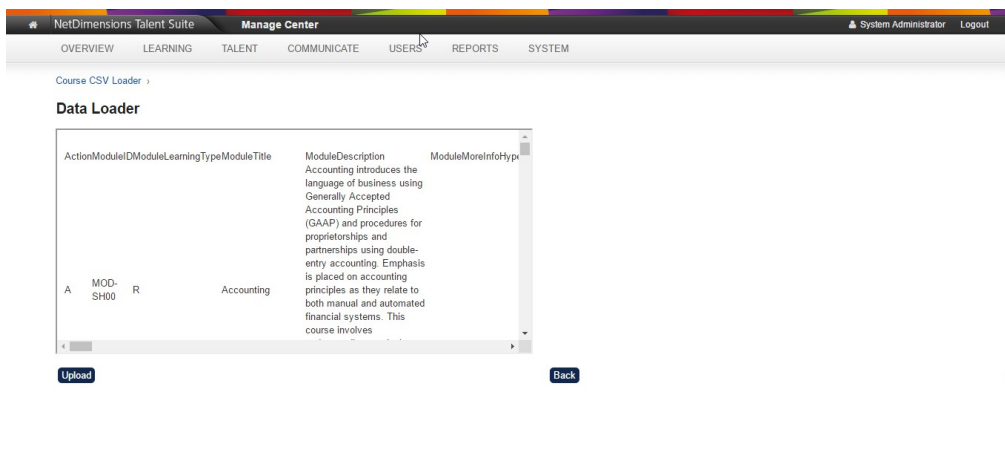


You will be able to specify the following general properties for each import:

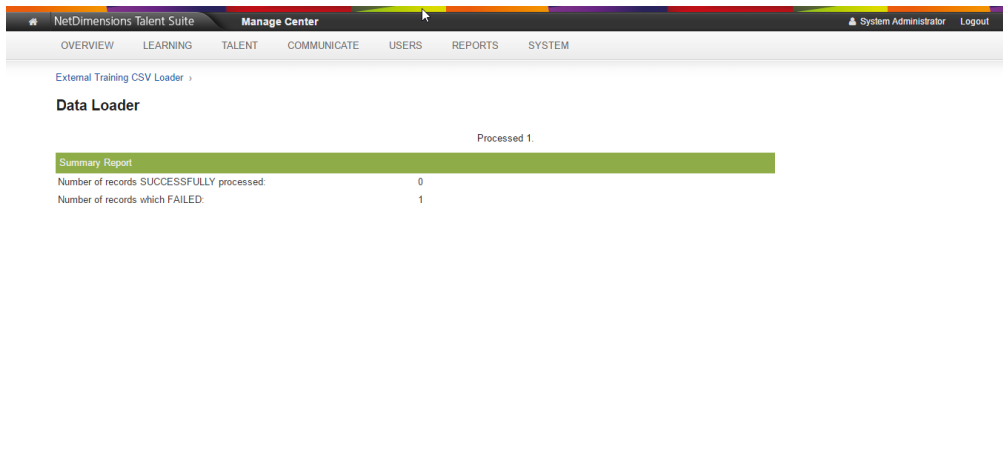
1. CSV File
2. Description (max 255 characters)
3. Encoding
4. Delimiter

If applicable, you will be presented with other import settings that are specific to the data loader.

Click Preview to view the uploaded document and click Upload to start the import:



After the import has been processed, a Summary Report will be displayed:



Log files and error reports will be accessible from the Loader's landing page.

Setting Custom Attribute Values

Custom Attributes can be set up in the system for certain object types, for example, Users, Organizations, Modules, and Sessions. To use the data loaders to set values against these custom attributes, add a column for each attribute with the header being the attribute code prefixed with:

- "OA-" for Organization Attributes in the Organization CSV Loader
- "UA-" for User Attributes in the User CSV Loader
- "MA-" for Module Attributes in the Course CSV Loader and Program CSV Loader
- "SA-" for Session Attributes in the Course CSV Loader and Program CSV Loader
- "QT-" for Session Attributes in the Question CSV Loader

Depending on the attribute type, the loader will expect different values:

- Free Text Attributes will expect any text as values
- Checkbox Attributes will expect "Y" or "N" as values
- Number Attributes will expect a number as values
- Drop Down Attributes will expect an Attribute Value Code.

Question CSV Loader

Loader Specific Settings

- "Permissions assigned to all new Questions": You can specify "Public" or "Private" permissions be set against questions created via the loader
- "Default Question Status"

Supported Fields

Field	Content	Data Handling	Default
Action	Control Action (Either Add or Update)	Must be "A" for Add, or "U" for Update	None
Question ID	Unique Identifier for the question	A Unique ID That Conforms to the LMS ID constraints (maximum 85 characters)	None
Question type	Question Type	Must be one of: SC:Single Choice MC:Multiple Choice TF:True or False ES:Essay FB:Fill in the Blank RA:Rating MA:Matching TR:Triple Rating	None
Question	Question Text	Any Text	None
Hints	Hint Text	Any Text	None
Pre-Comment	Pre-Comment Text	Any Text	None
Explanation	Explanation Text	Any Text	None
Image URL	URL for Image Content	e.g.:/nd/fresco/repository/images/8a1rlerev.jpg	None
Audio URL	URL for Audio Content	e.g.:/nd/fresco/repository/audio/ques.wav	None

Video URL	URL for Video Content	e.g.:/nd/fresco/repository/video/qvide.mpeg	None
Other (HTML)	Other Content	Any Text	None
CorrectAnswer	Correct Answer	<p>SC: Correct answer: the number of choice that is correct</p> <p>MC: Correct answer: all numbers that are correct, e.g.,2 3 4</p> <p>TF: Correct answer: as long as the first character is F, f, T, t</p> <p>ES: Correct answer: No correct answer or choice column data expected</p> <p>FB: Correct answer: Enter text for match</p> <p>RA: Correct answer used for spread, choice 1 and 2 used for low value label and high value label. Use defaults if not supplied</p> <p>MA: Correct answer column left blank - read up to 20 choice columns where Choice 1 matches Choice 2, Choice 3 match Choice 4, etc</p> <p>TR: Correct answer used for spread, choice 1 and 2 used for low value label and high value label. Use defaults if not supplied. Next 3 columns used for "column Heading" fields.</p> <p>Next 10 columns used for "Item" fields</p>	None
Choice1	Choice 1	Any Text	None
Choice2	Choice 2	Any Text	None
Choice3	Choice 3	Any Text	None
Choice4	Choice 4	Any Text	None
Choice5	Choice 5	Any Text	None
Choice6	Choice 6	Any Text	None
Choice7	Choice 7	Any Text	None
Choice8	Choice 8	Any Text	None
Choice9	Choice 9	Any Text	None
Choice10	Choice 10	Any Text	None
Choice11	Choice 11	Any Text	None

Choice12	Choice 12	Any Text	None
Choice14	Choice 14	Any Text	None
Choice15	Choice 15	Any Text	None
Choice16	Choice 16	Any Text	None
Choice17	Choice 17	Any Text	None
Choice18	Choice 18	Any Text	None
Choice19	Choice 19	Any Text	None
Choice20	Choice 20	Any Text	None
Question Status	Question Status	One of the following: ACT:Active WIP:Work in Progress URE:Under Review RET:Retired APP:Approved REV:Reviewed	As specified on submitting a file for upload
Version	Question Version Number	Any Integer	None
Writer	Question Writer		None
Reviewer	Question Reviewer		None
Approver	Question Approver		None
Weighting	Weighting		None
Reference	Reference Information		None
UsageCount	Usage Count		None
ShuffleChoices	Shuffle Choices when presenting to learner	"Y" or "N"	None
Comment	Comments	Any Text (maximum 512 characters)	None

ExpiryDate	Date on which Question Expires	Expiry Date should be formatted as: dd-MMM-yy HH:mm where Hour is in 24-hour format; Hour and minute should both be 2-digit	None
ExpiryTimezone	Timezone for Expiry Date	A Timezone ID, e.g. Pacific/Pago_Pago Pacific/Honolulu America/Anchorage America/Los_Angeles America/Phoenix America/Denver America/Chicago America/New_York America/Santiago America/Buenos_Aires Atlantic/South_Georgia Atlantic/Cape_Verde Europe/London Europe/Amsterdam Africa/Johannesburg Asia/Riyadh Asia/Dubai Asia/Calcutta Asia/Dhaka Asia/Bangkok Asia/Hong_Kong Asia/Tokyo Australia/Sydney SST Pacific/Auckland	None
PrimaryLanguage	Language	ISO 2-char codes: en, fr-CA, es-ES,...	Mutli-Language
Question Pool Level 1	Name of the Level 1 Question Pool to which this question belongs	Pool Name must match the name of an existing question pool exactly or a new pool will be created	Default Question Pool
Question Pool Level 2	Name of the Level 2 Question Pool to which this question belongs	Pool Name must match the name of an existing sub-pool of the question pool specified in Question Pool Level 1 exactly or a new sub-pool will be created	None
Question Pool Level 3	Name of the Level 3 Question Pool to which this question belongs	Pool Name must match the name of an existing sub-pool of the question pool specified in Question Pool Level 2 exactly or a new sub-pool will be created	None
Read Permission Template	Read Permission Template		None
Write Permission Template	Write Permission Template		None

AssignReadTemplate	User Targeting Template Action	<p>"L" - to link to the user targeting template as the permission targeting criteria.</p> <p>"C" - to completely copy and replace permission settings on this object using the current configured settings from the user targeting template.</p>	C
AssignWriteTemplate	User Targeting Template Action	<p>"L" - to link to the user targeting template as the permission targeting criteria.</p> <p>"C" - to completely copy and replace permission settings on this object using the current configured settings from the user targeting template.</p>	C

Validation

Though there is no need to validate any image, audio or video URL, you should nevertheless do so before entering the URL in the template.

	Error	Corrective Action
1	Only ADD and UPDATE supported	Ensure "Action" column contains "A" for adding or "U" for update
2	Not a valid question type	Ensure "Question Type" is not blank and is one of the following SC, MC, TF, ES, FB, RA, MA, or TR
3	ID: ([value for Question ID]); Field(Question ID) : This field must be lowercase, alphanumeric (plus _) and contain no blank spaces.	Ensure "Question ID" column contains alphanumeric or underscore characters only
4	ID: ([value for Question ID]); Field(Question Text): Required data is missing.	Ensure "Question Text" column is not blank
5	ID: ([value for Question ID]); Field(Correct Answer): Required data is missing.	Ensure "Correct Answer" is not blank
6	question ID(QDL1); java.lang.NumberFormatException: For input string: "[value for Correct Answer]"	Ensure "Correct Answer" is a number (for SC)

Role Access Control Data Loader

Loader Specific Settings

If the "Automatically create new roles" option checked, importing Role Codes that do not already exist in the system will result in new roles being created. This requires appropriate Role Access Control.

Field	Mandatory (M) / Optional (O)	Content	Data Handling
Role Code	M	Role Code	A unique ID for the role.
Role Name	M	Role Name	Role Name can be a bundle key or any text.
Access Control Code	M	Access Control Code	Access control item.
Access	M	Access Value	Level of access allowed for the access control item.
Read Permission Template	O	Read Permission Template Code	Set read permissions by using the User Targeting Template Code (max. 85 characters).
Write Permission Template	O	Write Permission Template Code	Set write permissions by using the User Targeting Template Code (max. 85 characters).
AssignReadTemplate	O	User Targeting Template Action	"L" - to link to the user targeting template as the permission targeting criteria. "C" - to completely copy and replace permission settings on this object using the current configured settings from the user targeting template.
AssignWriteTemplate	O	User Targeting Template Action	"L" - to link to the user targeting template as the permission targeting criteria. "C" - to completely copy and replace permission settings on this object using the current configured settings from the user targeting template.

Access Control Codes

Below are all the available Access Control Codes and possible values for each.

Access Control Code	Access Control Description	Access Value
ENROLLMENT_WIZARD_CHANGE_ENROLLMENT_STATUS	Change Enrollment Status	NO_ACCESS, UNRESTRICTED
ALLOW_SESSION_ENROLLMENT	Allow Session Enrollment	NO_ACCESS, READ_ONLY, UNRESTRICTED
SM_CERTIFICATIONS	Certifications	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_JOB_PROFILES	Job Profiles	NO_ACCESS, READ_ONLY, UNRESTRICTED
EXAM_SURVEY_REPORTS	Exam/Survey Reports	NO_ACCESS, READ_ONLY
REPORT_WIZARD	Report Wizard	NO_ACCESS, READ_ONLY, UNRESTRICTED
ACTIVE_ASSESSMENTS	Active Assessments	NO_ACCESS, READ_ONLY, UNRESTRICTED
CERTIFICATION_REPORTS	Certification Reports	NO_ACCESS, READ_ONLY
REPORT_MANAGER	Report Manager	NO_ACCESS, READ_ONLY, UNRESTRICTED
AUTO_ENROLL_CONSOLE	Auto-Enroll Console	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_ALLOW_TOKEN_MANUAL_ADJUSTMENT	Allow Token Manual Adjustment	NO_ACCESS, READ_ONLY
CONNECTION_STATISTICS	Connection Statistics	NO_ACCESS, READ_ONLY, UNRESTRICTED
COMMUNITY_MANAGER	Community Manager	NO_ACCESS, READ_ONLY

REVIEW_WORK_HISTORY	Work History	NO_ACCESS, READ_ONLY, UNRESTRICTED
ADDRESS_CHANGE	Address Change	NO_ACCESS, READ_ONLY, UNRESTRICTED
EXT_TRAINING_APPR	Ext. Training Approval	NO_ACCESS, UNRESTRICTED
EQUIVALENCY_RULE_DATA_LOADER	Equivalency Rule Data Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED
USER_GROUP_LISTING	User Groups	NO_ACCESS, READ_ONLY, UNRESTRICTED
USER_PROFILE_DATA_LOADER	User Profile Data Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_ALLOW_Q_CREATE	Allow Question Creation	NO_ACCESS, READ_ONLY
ORGANIZATION_REVIEW	Organization Review	NO_ACCESS, READ_ONLY, UNRESTRICTED
STATEMENT_LOG	Activity Log	NO_ACCESS, READ_ONLY
CERTIFICATION_PROGRAMS	Certification Programs	NO_ACCESS, UNRESTRICTED
RO_LOOK_FEEL	Allow Look and Feel Change	NO_ACCESS, READ_ONLY
RO_DELETE_COURSE	Allow Course Deletes	NO_ACCESS, READ_ONLY
CERTIFICATIONS_AWARDING_CSV_LOADER	Awarded Certificates CSV Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED
PENDING_ASSESSMENT	Competency Assessments	NO_ACCESS, READ_ONLY, UNRESTRICTED
NEWS_MANAGER	News Manager	NO_ACCESS, READ_ONLY, UNRESTRICTED

REVIEW_LANGAUGE_SKILLS	Language Skills	NO_ACCESS, READ_ONLY, UNRESTRICTED
PERSONAL_CALENDAR	Personal Calendar	NO_ACCESS, READ_ONLY, UNRESTRICTED
AUTO_ENROLL	Auto/Group Enroll	NO_ACCESS, READ_ONLY, UNRESTRICTED
TERMS_OF_USE_MANAGER	Terms of Use Manager	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_MODERATOR	Allow Forum Moderation	NO_ACCESS, READ_ONLY
COMPLIANCE_REPORTS	Compliance Reports	NO_ACCESS, READ_ONLY
LEARN_MENU	Learn Menu	NO_ACCESS, READ_ONLY
RO_SHOW_LEARNING_GROUP_BIOS	Show Biographies and Activities of Other Users in the Same Learning Group	NO_ACCESS, READ_ONLY
COMPETENCY_EXPIRY_DATA_LOADER	Competency Expiry Data Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED
USER_PAYMENTHISTORY	Payment History	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_DISABLE_SMARTPHONE_UI	Disable Smartphone UI	NO_ACCESS, READ_ONLY
MY_COMPETENCIES	Competencies	NO_ACCESS, READ_ONLY, UNRESTRICTED
PERMISSION_TEMPLATE	User Targeting Template Manager	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_ALLOW_EXAM_GRADING	Allow Exam Grading	NO_ACCESS, READ_ONLY
SCREEN_LAYOUT_MANAGER	Screen Layout Manager	NO_ACCESS, READ_ONLY, UNRESTRICTED

PUBLISHED_CUSTOMIZER_REPORTS	Published Customizer Reports	NO_ACCESS, READ_ONLY
USER_PREFERENCES	User Preferences	NO_ACCESS, READ_ONLY, UNRESTRICTED
AUTO_EXEMPT_POLICIES	Automatic Exemption Policies	NO_ACCESS, READ_ONLY, UNRESTRICTED
EMPLOYMENT_INFORMATION	Employment Information	NO_ACCESS, READ_ONLY, UNRESTRICTED
EXAM_CONFIGURATION	Exam Configuration	NO_ACCESS, READ_ONLY, UNRESTRICTED
USER_ID_CHANGE	User ID Change	NO_ACCESS, UNRESTRICTED
CATALOG_ASSIGNMENT_CSV_LOADER	Catalog Assignment CSV Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED
RECOMMENDATIONS	AI Assistant Recommendations	NO_ACCESS, READ_ONLY, UNRESTRICTED
APPRAISAL_SEARCH	Appraisal Search	NO_ACCESS, READ_ONLY, UNRESTRICTED
PREFERENCES_MENU	Preferences Menu	NO_ACCESS, READ_ONLY
QUESTION_EDITOR	Questions	NO_ACCESS, READ_ONLY, UNRESTRICTED
ORGANIZATION_TOKEN_ACCOUNTS	Organization Token Accounts	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_ENROLLMENT	Review Enrollment	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_OLSA_SEARCH	Allow Skillsoft (OLSA) Search	NO_ACCESS, READ_ONLY
RO_SHOW_TOKENS_TAB	Show Tokens Tab	NO_ACCESS, READ_ONLY

RO_ENROLL_OVERRIDE	Allow Enrollment Override	NO_ACCESS, READ_ONLY
MY_ENROLLMENT_REQUESTS	My Enrollment Requests	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_PRIVILEGE_LEVEL	Privilege Level	0, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10
ASSIGN_MODULE	Assign Module	NO_ACCESS, UNRESTRICTED
TEACH_UPLOAD_REFERENCE_RESOURCE	Allow session level reference resource upload from Teach	NO_ACCESS, READ_ONLY
PROFILE_SUMMARY	Profile Summary	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_DISPLAY_EXAM_PASSWORD	Display Exam Password	NO_ACCESS, READ_ONLY
ENROLLMENT_POLICY_EDITOR	Enrollment Policy Editor	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_ALLOW_DEPLOY_ASSESSMENT	Allow Assessment Deployment	NO_ACCESS, READ_ONLY
ROLE_ACCESS_DATA_LOADER	Role Access Data Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_TASK_SIGN_OFF	Task Approval	NO_ACCESS, READ_ONLY, UNRESTRICTED
RECORDS_TRANSCRIPT	Records/Transcript	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_LEARNING_PATH	Learning Path	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_OVERALL_STATUS	Overall Status	NO_ACCESS, READ_ONLY, UNRESTRICTED
RELOCATION_INTERESTS	Relocation Interests	NO_ACCESS, READ_ONLY, UNRESTRICTED

NEWS_MENU	News Menu	NO_ACCESS, READ_ONLY
SYSTEM_LANGUAGE_ACTIVATION	System Language Activation	NO_ACCESS, READ_ONLY, UNRESTRICTED
HOME_PAGE_MANAGER	Home Page Manager	NO_ACCESS, UNRESTRICTED
MIGRATE_LEARNING_OBJECT_ID	Migrate Learning Object ID	NO_ACCESS, UNRESTRICTED
REVIEW_CAREER_CENTER_SUMMARY	Career Center Summary	NO_ACCESS, READ_ONLY, UNRESTRICTED
SYSTEM_ADMINISTRATION	System Administration	NO_ACCESS, READ_ONLY, UNRESTRICTED
BULK_ROLE_UPDATE	Bulk Role Update	NO_ACCESS, UNRESTRICTED
SYSTEM_CONFIGURATION	System Configuration	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_ALLOW_EXAM_INSTANCE_DELETE	Allow Exam Instance Deletion	NO_ACCESS, READ_ONLY
CATALOG_CONFIGURATION	Catalog Configuration	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_TRAINING_GAP	Training Gap Analysis	NO_ACCESS, READ_ONLY, UNRESTRICTED
INSTRUCTOR	Instructor	NO_ACCESS, READ_ONLY
CATALOG_MENU	Catalog Menu	NO_ACCESS, READ_ONLY
RO_SHOW_TOP_LEVEL_OBJECTS_ONLY	Show Only Top Level Learning Objects in Enrolled Learning Modules	NO_ACCESS, READ_ONLY
REVIEW_MY_FILES	Review My Files	NO_ACCESS, READ_ONLY, UNRESTRICTED

MANAGE_MENU	Manage Menu	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_ALLOW_EXPORT_PERSONAL_DATA	User Data Export	NO_ACCESS, READ_ONLY
TRANSCRIPT_HISTORY	Transcript History	NO_ACCESS, READ_ONLY
REVIEW_CERTIFICATIONS	Review Certifications	NO_ACCESS, READ_ONLY, UNRESTRICTED
SKILLS_DICTIONARY	Competency Library	NO_ACCESS, READ_ONLY, UNRESTRICTED
ENROLLMENT_APPROVAL	Enrollment Approval	NO_ACCESS, READ_ONLY, UNRESTRICTED
CAREER_DEVELOPMENT_CENTER	Career Development Center	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_ADD_USER	Allow User Creation	NO_ACCESS, READ_ONLY
COMPETENCY_DATA_LOADER	Competency Data Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED
SYSTEM_REPORTS	System Reports	NO_ACCESS, READ_ONLY
ACCOUNTS	Accounts	NO_ACCESS, READ_ONLY, UNRESTRICTED
CATALOG_SEARCH	Catalog Browser	NO_ACCESS, READ_ONLY, UNRESTRICTED
COMPETENCY_EDITOR	Competency Group Editor	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_USER_PW_RESET	Allow User Password Change	NO_ACCESS, READ_ONLY
PERFORMANCE_APPRAISAL	Performance Appraisal	NO_ACCESS, READ_ONLY, UNRESTRICTED

ORG_MAINTENANCE_DATA_LOADER	Organization Data Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_INCOMPLETE_EXAM	Review Incomplete Exam Attempts	NO_ACCESS, UNRESTRICTED
RO_NEW_MAIL_ATTACHMENT	Allow Attachment in New Mail Form	NO_ACCESS, READ_ONLY
REVIEW_EXTERNAL_TRAINING_HISTORY	Review External Training History	NO_ACCESS, READ_ONLY, UNRESTRICTED
MANAGEFORUM	Discussion Forums	NO_ACCESS, READ_ONLY, UNRESTRICTED
EXAM_MANAGER	Exam and Question Manager	NO_ACCESS, READ_ONLY, UNRESTRICTED
ADHOC_COMPETENCY_ASSESSMENT_DATA_LOADER	Ad-hoc Competency Assessment Data Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED
DIRECT_APPRAISER_REVIEW	Direct Appraiser Review	NO_ACCESS, READ_ONLY, UNRESTRICTED
LEARNING_PATH	Learning Path	NO_ACCESS, READ_ONLY, UNRESTRICTED
PERSONAL_ORG_ASSOCIATION	My Orgs	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_GLOBAL_REG_APPROVAL	Allow Global Approval	NO_ACCESS, READ_ONLY
CATALOG_MANAGER	Catalog Manager (Assessment Workflow Manager, Virtual Classroom Account Setup, and Indicated Interest Administration)	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_MENU	Review Menu	NO_ACCESS, READ_ONLY, UNRESTRICTED

RO_ALLOW_EXAM_REMEDIAL_TRAINING_COMMENTS	Allow Exam Remedial Training Comments	NO_ACCESS, READ_ONLY
TRAINING_PLAN	Training Plan	NO_ACCESS, READ_ONLY, UNRESTRICTED
USER_ATTRIBUTES_CONFIGURATION	User Attributes Configuration	NO_ACCESS, READ_ONLY, UNRESTRICTED
COST_ACCOUNTING	Cost Accounting	NO_ACCESS, READ_ONLY, UNRESTRICTED
COMMUNICATE_MENU	Communicate Menu	NO_ACCESS, READ_ONLY
HIGHEST_ORGANIZATION_LEVEL_VISIBLE	Highest Organization Level Visible	EXCLUDE, INCLUDE, ROOT, LEVEL 1, LEVEL 2, LEVEL 3, LEVEL 4, LEVEL 5, LEVEL 6, LEVEL 7, LEVEL 8, LEVEL 9, LEVEL 10, LEVEL 11, LEVEL 12, LEVEL 13, LEVEL 14, LEVEL 15, LEVEL 16, LEVEL 17, LEVEL 18, LEVEL 19
MY_FILES	My Files	NO_ACCESS, READ_ONLY, UNRESTRICTED
EXAM_UTILITIES	Exam Utilities	NO_ACCESS, READ_ONLY, UNRESTRICTED
MODIFY_COMPETENCY_EXPIRY	Modify Competency Expiry	NO_ACCESS, UNRESTRICTED
REVIEW_SKILLS	Review Skills	NO_ACCESS, READ_ONLY, UNRESTRICTED
CONTACT_DETAILS	Contact Details	NO_ACCESS, READ_ONLY, UNRESTRICTED

PROFICIENCY_LEVELS	Proficiency Levels	READ_ONLY, UNRESTRICTED
COURSE_REPORTS	Course Reports	NO_ACCESS, READ_ONLY
EXTERNAL_TRAINING_HISTORY	External Training Records	NO_ACCESS, READ_ONLY, UNRESTRICTED
VIEW_COURSE_COUPON	View Course Coupon	NO_ACCESS, READ_ONLY
REVIEW_ENROLLMENT_REQUESTS	Review Enrollment Requests	NO_ACCESS, READ_ONLY, UNRESTRICTED
QUESTION_DATA_LOADER	Data Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED
CACHE_STATISTICS	Cache Statistics	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_ALLOW_EXAM_CREATE	Allow Exam Creation	NO_ACCESS, READ_ONLY
CONTENT_SERVER_CONFIGURATION	Content Server Configuration	NO_ACCESS, READ_ONLY, UNRESTRICTED
REPORT_SCHEDULER	Report Scheduler	NO_ACCESS, READ_ONLY, UNRESTRICTED
USER_EDITOR	Users	NO_ACCESS, READ_ONLY, UNRESTRICTED
COMPATIBLE_LEARNING_RESOURCES	Content Package, AICC Course Structure, Resource, Web Catalogs and PENS Import	NO_ACCESS, READ_ONLY, UNRESTRICTED
USER_DATA_LOADER	User Data Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED
MODULE_SESSION_EDITOR	Catalog Editor - Session Management	NO_ACCESS, READ_ONLY, UNRESTRICTED

USER_GROUP_DATA_LOADER	User Group Data Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED
PERFORMANCE_AND_ORGANIZATION_GOAL	Performance and Organizational Goals	NO_ACCESS, READ_ONLY, UNRESTRICTED
SKILLS_ASSESSMENT	Skills Assessment	NO_ACCESS, READ_ONLY, UNRESTRICTED
PEER_COMMENTS	Peer Comments	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_OWASP_OVERRIDE	OWASP Restrictions Override	NO_ACCESS, READ_ONLY
REVIEW_RESUME	Resumé	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_LANGUAGE_EDITING	Allow Custom Language String Editing	NO_ACCESS, READ_ONLY
REVIEW_ACCOUNTS	Review Accounts	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_PERFORMANCE_AND_ORGANIZATION_GOAL	Review Performance and Organizational Goals	NO_ACCESS, READ_ONLY, UNRESTRICTED
TRANSCRIPT_STATUS_MANAGER	Transcript Status Manager	NO_ACCESS, READ_ONLY, UNRESTRICTED
MY_JOB_PROFILES	Job Profiles	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_ALLOW_Q_APPROVAL_OVERRIDE	Allow Question Approval Override	NO_ACCESS, READ_ONLY
MY_WORK_HISTORY	Work History	NO_ACCESS, READ_ONLY, UNRESTRICTED
CERT_UTILITIES	Certification Utilities	NO_ACCESS, READ_ONLY, UNRESTRICTED

RO_ORGANIZATION_MAINTENANCE	Allow Organization Maintenance	NO_ACCESS, READ_ONLY
PRINTER_FRIENDLY_EXAM_TRANSCRIPTS	Printer-Friendly Exam Transcripts	NO_ACCESS, READ_ONLY
EXTERNAL_TRAINING_CSV_LOADER	External Training CSV Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED
SKILLS_ASSESSMENTS	Skills Assessments	NO_ACCESS, READ_ONLY
USER_REPORT_MANAGER	Report Manager	NO_ACCESS, READ_ONLY
NEWS_SEARCH	News Search	NO_ACCESS, READ_ONLY
COURSE_DATA_LOADER	Course CSV Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED
ACCOUNT_DISPLAY_FORMAT	Account Display Format	DETAILED, SUMMARY
EXAM_REVIEW	Exam Review	NO_ACCESS, UNRESTRICTED
PASSWORD_CHANGE	Password Change	NO_ACCESS, UNRESTRICTED
INTEGRATED_USER_CALENDAR	Integrated User Calendar	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_IS_GLOBAL_EXTERNAL_TRAINING_APPROVER	Is Organizational External Training Approver	NO_ACCESS, READ_ONLY
RO_DELETE_USER	Allow User Deletes	NO_ACCESS, READ_ONLY
REVIEW_RELOCATION_INTERESTS	Relocation Interests	NO_ACCESS, READ_ONLY, UNRESTRICTED
WITHDRAWAL_APPROVAL	Withdrawal Approval	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_SESSION_TRANSFER	Session Transfer	NO_ACCESS, UNRESTRICTED
RO_ALLOW_Q_APPROVAL	Allow Question Approval	NO_ACCESS, READ_ONLY

XLIFF_IMPORT_EXPORT	Import and Export XLIFF files	NO_ACCESS, READ_ONLY
KNOW_YOUR_COLLEAGUES	Know Your Colleagues	NO_ACCESS, READ_ONLY
PAYMENT_MANAGER	Payment Plans and Optional Payment Items	NO_ACCESS, READ_ONLY, UNRESTRICTED
HTML_WIDGETS	HTML Widgets	NO_ACCESS, UNRESTRICTED
JOB_PROFILE_DATA_LOADER	Job Profile Data Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED
WIKI_MENU	Wiki	NO_ACCESS, UNRESTRICTED
EXAM_CRITERIA_EDITOR	Exams	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_USER_EDITOR_GROUPS	Allow User Editor Group View	NO_ACCESS, READ_ONLY
USER_ATTRIBUTES_EXTENSION	User Attribute Extension	NO_ACCESS, READ_ONLY, UNRESTRICTED
EDIT_COURSE_COUPON	Edit Course Coupon	NO_ACCESS, UNRESTRICTED
INSTRUCTOR_CALENDAR	Resource Planner	NO_ACCESS, READ_ONLY, UNRESTRICTED
COMPETENCY_ASSESSMENT_TEMPLATE	Competency Assessment Templates	NO_ACCESS, READ_ONLY, UNRESTRICTED
COM_FORUM	Discussion Forum Categories	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_COMPETENCIES	Competencies	NO_ACCESS, READ_ONLY, UNRESTRICTED
CATALOG_STRUCTURE	Catalog Structure	NO_ACCESS, READ_ONLY, UNRESTRICTED
INSTRUCTOR_REVIEW_DETAILS	Detailed Review by Instructor	READ_ONLY, UNRESTRICTED

JOB_PROFILES	Job Profiles	NO_ACCESS, READ_ONLY, UNRESTRICTED
USER_ORG_VISIBILITY_REPORT_WIZARD_FILTER	User and Organization Visibility Report Wizard Filter	NO_ACCESS, READ_ONLY
ORGANIZATION_REPORTS	Organization Reports	NO_ACCESS, READ_ONLY
MESSAGE_BOARD	Message Board	NO_ACCESS, READ_ONLY, UNRESTRICTED
HOMEWORK_FILES	Allow Global Homework Files Access	NO_ACCESS, READ_ONLY
GOAL_TEMPLATE	Goal Templates	NO_ACCESS, READ_ONLY, UNRESTRICTED
ROLE_PERMISSIONS	Role Permissions	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_FILE_EDIT	Allow Global Upload Maintenance	NO_ACCESS, READ_ONLY
RO_USER_STATUS_CHANGE	Allow User Status Change	NO_ACCESS, READ_ONLY
REVIEW_CAREER_DEVELOPMENT_CENTER	Career Development Center	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_APPRAISAL	Performance Appraisal	NO_ACCESS, READ_ONLY, UNRESTRICTED
LANGAUGE_SKILLS	Language Skills	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_IS_EXTERNAL_Q_APPROVER	Is External Question Approver	NO_ACCESS, READ_ONLY
CURRENT_LEARNING_MODULES	Current Learning Modules	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_ALLOW_Q_OPEN_EDIT	Allow Question Open for Editing	NO_ACCESS, READ_ONLY

RO_ALLOW_EXAM_GENERATION	Allow Exam Generation	NO_ACCESS, READ_ONLY
RO_TITLE_AND_ID_FORMAT	Title and ID Format	TITLE_FORMAT, TITLE_AND_ID_FORMAT, ID_AND_TITLE_FORMAT
OVERALL_STATUS	Overall Status	NO_ACCESS, READ_ONLY, UNRESTRICTED
QUESTION_ATTRIBUTES	Question Attributes	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_HOMEPAGETEMPLATE	Home Page Templates	Default, *NONE*
REVIEW_LEARNING_GROUP	Learning Group	NO_ACCESS, READ_ONLY, UNRESTRICTED
GOAL_PROGRAM	Goal Programs	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_ALLOW_EXAM_INSTANCE_MANAGER	Allow Exam Instance Manager	NO_ACCESS, READ_ONLY
TOKEN_PACKAGES	Token Packages	NO_ACCESS, READ_ONLY, UNRESTRICTED
COURSE_CHECKLIST	Course Checklist	NO_ACCESS, READ_ONLY, UNRESTRICTED
KNOWLEDGE_CENTER	Knowledge Center	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_REPORT_MANAGER	Report Manager	NO_ACCESS, READ_ONLY
REVIEW_GLOBAL_OBJ	SCORM Global Objectives	NO_ACCESS, READ_ONLY, UNRESTRICTED
PROGRAM_DATA_LOADER	Program CSV Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_EMPLOYMENT_INFORMATION	Employment Information	NO_ACCESS, READ_ONLY, UNRESTRICTED

TERMS_OF_USE_SUMMARY	Terms of Use	NO_ACCESS, UNRESTRICTED
BACKGROUND_TASKS_VIEWER	Background Task Monitor	NO_ACCESS, READ_ONLY
TX_STATISTICS	Transaction Statistics	NO_ACCESS, READ_ONLY, UNRESTRICTED
ACCESS_VIOLATIONS	Access Violations	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_TRANSCRIPT_HISTORY	Review Transcript History	NO_ACCESS, READ_ONLY
REVIEW_RECORDS_TRANSCRIPT	Review Records/ Transcript	NO_ACCESS, READ_ONLY, UNRESTRICTED
APPRAISAL_MANAGER	Appraisal Manager	NO_ACCESS, READ_ONLY, UNRESTRICTED
MAIL	Mail	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_ALLOW_DEPLOY_NINE_BOX_REPORT	Allow 9-Box Report Deployment	NO_ACCESS, READ_ONLY
USER_SESSIONS	User Sessions	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_ALLOW_FULL_ORG_VIEW_OF_PARTICIPANTS	Allow Full Organization View of Participants	NO_ACCESS, READ_ONLY
GROUP_REVIEW	Group Review	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_DEVELOPMENT_GOAL	Review Development Goals	NO_ACCESS, READ_ONLY, UNRESTRICTED
SKILLS	Skills	NO_ACCESS, READ_ONLY, UNRESTRICTED
COMPETENCY_MANAGER	Competency Manager	NO_ACCESS, READ_ONLY, UNRESTRICTED

CHECKLIST_TEMPLATE	Checklist Template	NO_ACCESS, READ_ONLY, UNRESTRICTED
PERSONAL_NOTEBOOK	Personal Notebook	NO_ACCESS, UNRESTRICTED
DEVELOPMENT_GOAL	Development Goals	NO_ACCESS, READ_ONLY, UNRESTRICTED
COURSEWARE_EDITOR	Courseware Editor	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_EXAM_PARTICIPANTS	Exam Participants Review	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_ALLOW_USER_APPRAISAL_ADMIN	Allow User Appraisal Administration	NO_ACCESS, READ_ONLY
ENROLL_OTHER_USERS	Enroll Other Users	NO_ACCESS, READ_ONLY, UNRESTRICTED
EXAM_GENERATOR	Exam Generator	NO_ACCESS, READ_ONLY, UNRESTRICTED
DATABASE_OBJECT_STATISTICS	Database Object Statistics	NO_ACCESS, READ_ONLY, UNRESTRICTED
ADDITIONAL_ENROLLMENT_INFORMATION	Additional Enrollment Information	NO_ACCESS, READ_ONLY, UNRESTRICTED
ENROLL_PARTICIPANT_FROM_TEACH_REVIEW	Enroll Participant From Teach Review	NO_ACCESS, UNRESTRICTED
MASS_EMAIL_SENDER	Mass E-mail Sender	NO_ACCESS, UNRESTRICTED
RO_ALLOW_BULK_SESSION_STATUS_UPDATE	Allow Bulk Session Status Update	NO_ACCESS, READ_ONLY
SUPERVISOR_ASSESSMENT	Supervisor Assessment	NO_ACCESS, UNRESTRICTED
TOKEN_ACCOUNT_DATA_LOADER	Token Account Data Loader	NO_ACCESS, READ_ONLY, UNRESTRICTED

RO_ADMIN_HELP	Allow Admin Online Help	NO_ACCESS, READ_ONLY
REVIEW_LEARNING_CENTER_SUMMARY	Learning Center Summary	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_CONTACT_DETAILS	Contact Details	NO_ACCESS, READ_ONLY, UNRESTRICTED
EMAIL_TEMPLATE_EDITOR	E-mail Template Editor	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_UNRESTRICTED_DELEGATION	Allow Unrestricted Delegation	NO_ACCESS, READ_ONLY
ALLOW_THE_USER_TO_MODIFY_THE_EXAM_AFTER_THE_END_DATE	Allow the user to modify the exam after the end date.	NO_ACCESS, UNRESTRICTED
RESUME	Resumé	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_TRAINING_PLAN	Training Plan	NO_ACCESS, READ_ONLY, UNRESTRICTED
BROADCAST_MESSENGER	Broadcast Messenger	NO_ACCESS, READ_ONLY, UNRESTRICTED
MODULE_EDITOR	Catalog Editor - Module Management	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_REVIEW_APPRAISEE_ALL_APPRAISAL	Allow Review Employee All User Appraisals	NO_ACCESS, READ_ONLY
ADMIN_STATEMENT_LOG	Activity Log	NO_ACCESS, READ_ONLY
RO_LIMIT_ADMIN_PRIVILEGES	Limit Catalog Administration Privileges	NO_ACCESS, READ_ONLY
COMPLIANCE_ANALYTICS	Compliance Analytics	NO_ACCESS, READ_ONLY, UNRESTRICTED
USER_SEARCH	User Search	NO_ACCESS, READ_ONLY

FACILITY_MAINTENANCE	Class Resource Manager	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_ALLOW_Q_REVIEW	Allow Question Review	NO_ACCESS, READ_ONLY
DASHBOARD	Dashboard	NO_ACCESS, UNRESTRICTED
CERTIFICATIONS_APPROVAL	Certification Approval	NO_ACCESS, UNRESTRICTED
EQUIVALENCY_MANAGER	Manage Equivalency Rules	NO_ACCESS, READ_ONLY, UNRESTRICTED
COM_MESSAGE_BOARD	Message Board	NO_ACCESS, READ_ONLY, UNRESTRICTED
MOBILE_EKP	mEKP Administration	NO_ACCESS, READ_ONLY, UNRESTRICTED
CERTIFICATIONS	Certifications	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_REVIEW_ALL_TRANSCRIPT_DETAIL	Display Details, Progress, and Course Interactions when Reviewing Learner Transcript Detail	NO_ACCESS, READ_ONLY
USER_MANAGER	User Manager	NO_ACCESS, READ_ONLY, UNRESTRICTED
COMPETENCY_MODELS	Competency Models	NO_ACCESS, READ_ONLY, UNRESTRICTED
PAYMENT_HISTORY	Payment History	NO_ACCESS, READ_ONLY, UNRESTRICTED
REVIEW_BIOGRAPHY	Profile Summary	NO_ACCESS, READ_ONLY, UNRESTRICTED
PAGE_STATISTICS	Page Statistics	NO_ACCESS, READ_ONLY, UNRESTRICTED

LOGIN_REMINDER	Login Reminder	NO_ACCESS, READ_ONLY, UNRESTRICTED
LOGICALLY_DELETED_USER	Logically Deleted Users	NO_ACCESS, UNRESTRICTED
REVIEW_EDUCATION_HISTORY	Education	NO_ACCESS, READ_ONLY, UNRESTRICTED
CERTIFICATE_AWARD_ATTRIBUTES	Certificate Award Attributes	NO_ACCESS, READ_ONLY, UNRESTRICTED
TRAINING_GAP_ANALYSIS	Training Gap Analysis	NO_ACCESS, READ_ONLY, UNRESTRICTED
JOB_PROFILE_AUTO_ASSIGN_CONSOLE	Profile Auto-Assign Console	NO_ACCESS, READ_ONLY, UNRESTRICTED
RO_DISPLAY_EXAM_EDITOR	Display Exam Editor	NO_ACCESS, READ_ONLY
ENROLLMENT_WIZARD	Enrollment Wizard	NO_ACCESS, UNRESTRICTED
REVIEW_TERMS_OF_USE_SUMMARY	Review Terms of Use	NO_ACCESS, UNRESTRICTED
REVIEW_USER_ATTRIBUTES_EXTENSION	User Attribute Extension	NO_ACCESS, READ_ONLY, UNRESTRICTED
REPOSITORY_MANAGER	Repository Manager	NO_ACCESS, READ_ONLY, UNRESTRICTED

Validation

	Error	Corrective Action
1	Some fields are missing	Ensure file has a "Role Code", a "Role Name", a "Access Control Code", and a "Access Value" column and that all values are not blank
2	Role Code or Role Name exceeds the maximum character length when "Create" is enabled	Ensure values specified for "Role Code" and "Role Name" are within the 85 character limit

3	Role Code is not recognized and "Create" option is disabled	Ensure "Role Code" already exists in the system or enable the "Create Role" option
4	No permission on role	Upload the file using a login that has been granted unrestricted access/permission to the Role referred to by "Role Code". If uploader is not permitted to update the Role, a different value should be used for "Role Code" to create a new Role.
5	Role Name is different for a Role Code that already exists	Ensure value for "Role Name" is as defined in the target system or choose another value for "Role Code" to create a new Role
6	You do not have sufficient privileges	Upload the file using a login with at least one assigned role with privilege level higher than that of the Role being updated
7	Access Control Code is not recognized	Ensure the value for "Access Control Code" is as output in R418 in the target system
8	Access control unavailable; unable to update this role.	Additional configuration or licensing is required to enable the features on the target system. If these are not required, the lines should be removed from the file
9	Access is not recognized for that feature	Ensure the "Access Value" is one of the allowed values for the "Access Control Code" (See CSV Formatting help on target system for allowed values per access control code)
10	System administrators require to use the User Manager Menu and role permissions features. Hence, these permissions have not been changed.	Upload the file using a System Administrator login
11	If Report Manager is enabled under the Review menu, make sure the Report Manager feature under report categories has equal or greater access than the Report Manager feature under Review menu.	
12	System administrator's privilege cannot be lowered	

Organization CSV Loader

Supported Fields

Field	Content	Data Handling	Default
Action	Control Action (Either Add, Delete or Update)	Must be "A", "D", "U", or "AU" (Add, Delete, Update, Add or Update as appropriate)	None
Org Code	Organization Code	Any Text (Max field length:85)	None
Org Desc	Organization Description	Any Text (Max field length:85)	None
Parent	The Parent Hierarchy Leading to This Level	The organization hierarchy leading up to this level with organization code separated by /, e.g., ROOT/level1org/level2org	None
Manager Name	Member Edit Privilege - Manager's Name	"Y" or "N"	N
Manager Email	Member Edit Privilege - Manager's Email	"Y" or "N"	N
Cost Center	Member Edit Privilege - Cost Center	"Y" or "N"	N
Location Code	Member Edit Privilege - Location Code	"Y" or "N"	N
External Competency Mgmt	External Competency Management Enabled	"Y" or "N"	N
Transcript Review	Transcript Review Access	Inheriting from parents ("I") or Review settings ("R")	I
Reviewer Transcript Access	Level of Reviewer Transcript Access	Completion Status ("C"), Overall Progress ("D"), Overall & SCO Progress ("P"), Full Details ("A")	None
DA Transcript Access	Level of Direct Appraiser Transcript Access	Completion Status ("C"), Overall Progress ("D"), Overall & SCO Progress ("P"), Full Details ("A")	None

Instructor Transcript Access	Level of Instructor Transcript Access	Completion Status ("C"), Overall Progress ("D"), Overall & SCO Progress ("P"), Full Details ("A")	None
Enrollment Policy	Organizational Enrollment Policy	Policy Name (Max field length:85)	None
Assessment Template	Organizational Assessment Template	Assessment Template Name (Max field length:50)	None
Payment Plan	Organizational Payment Plan	Payment Plan Name (Max field length:85)	None
Token Account	Organizational Token Account	Token Account Name (Max field length:200)	None
Payment by Invoice	Organizational Payment by Invoice Setting	"Y" or "N"	N
Approver	Organization's Approver	A Unique ID That Conforms to PeopleFluent LMS ID constraints (maximum 85 characters)	None
Welcome Email	Organizational Welcome Email	Email Template Name (Max field length:100)	None
New Password Email	Organizational New Password Email	Email Template Name (Max field length:100)	None
Feedback Address	Organizational Feedback Address	Valid E-mail or Path (Max field length:85)	None
Logout URL	Organizational Logout URL	Valid Path (Max field length:200)	None
Background Image	Organizational Background Image	Image Path (Max field length:255)	None
Imprint	Organizational Imprint	Any Text	None

Update of dynamic organization attributes is also supported by the loader. To update any dynamic attribute, add a column with the attribute code prefixed by "OA-" as header to the data file.



Info:

- The reserve word *NONE* is supported for clearing fields.
- When deleting an organization, users belonging to the deleted level will be rolled up into its parent.

Validation

	Error Message	Corrective Action
1	Missing Action Column/Invalid Action Input Value(s)	Ensure file has an "Action" column containing values "A", "U", "D", or "AU" only
2	Organization does not exist.	If action is "A", ensure file has a "Parent" column containing the full organization code path to an existing organization e.g. ROOT/OrgCode1/OrgCode2. If action is "U", also ensure Organization referred to by "Parent" contains a child organization with Organization Code as specified in the "Org Code" column
3	Organization ID is invalid. IDs can only contain letters, numbers, and the underscore (_).	Ensure file has an "Org Code" column and that all specified values contain only letters, numbers, or the underscore character
4	Organization Description cannot be blank.	If action is "A", ensure file has an "Org Desc" column and that all specified values are not blank. If action is "U", ensure the reserved word *NONE* has not been used as a value
5	Sorry, but this Org Code/ Org Desc already exists.	Ensure that organization codes and organization descriptions are unique across sibling organizations

User CSV Loader

Loader Specific Settings

In addition to the standard import settings, you can set the following properties:

- Select profile
- Create any new user attribute values found in the CSV file
- Create any user groups found in the CSV file (enabling will create user groups on the fly with the uploader granted write permission)
- Create any new organizations found in User Organization columns in the CSV file, and update organization details if there are any differences
- Synchronize with iPaaS

Supported Fields

Field	Content	Data Handling	Default	Reserved Words
Action	Control Action (Either Add, Delete or Update)	Must be "A", "D", "U", or "AU" (Add, Delete, Update, Add or Update as appropriate)	None	
UserID	User ID	A Unique ID That Conforms to PeopleFluent LMS ID constraints. User IDs are stored in lowercase. (Max field length: 85 characters)	None	

BirthDate(dd-mmm-yy)	Date of Birth	<p>The following date formats are supported: dd-mm-yy (e.g. "31-12-13")</p> <p>dd-mm-yyyy (e.g. "31-12-2013")</p> <p>dd-mmm-yy (e.g. "31-dec-13")</p> <p>dd-mmm-yyyy (e.g. "31-dec-2013")</p> <p>A string of "NONE" implies no specified date.</p> <p>For dd-mm-yy and dd-mmm-yy formats where the year component may be ambiguous, the date is assumed to be in the past unless it results in a date that is over 80 years ago, in which case it will be assumed to be a date in the future.</p>	None	*NONE*
City	Contact Info - City	Any Text (Max field length:50)	None	*NONE*
Company Address 1	Contact Info - Address 1	Any Text (Max field length:150)	None	*NONE*
Company Address 2	Contact Info - Address 2	Any Text (Max field length:150)	None	*NONE*
CompanyName	Contact Info - Company Name	Any Text (Max field length:50)	None	*NONE*
Cost Center	Cost Center	Any Text (Max field length:45)	None	*NONE*
Cost Center Name	Cost Center Name	Any Text (Max field length:85)	None	*NONE*
Country	Contact Info - Country	<p>Any Text (Max field length:3)</p> <p>Note: ISO 3166-1 alpha-3</p>	None	
DeptId	Department ID	Any Text (Max field length:85)	None	*NONE*
Department	Department Name	Any Text (Max field length:85)	None	*NONE*

Direct Appraiser	Manager -- whoever can authorize	<p>This must be a PeopleFluent LMS User ID.</p> <p>If System Configuration option "Require Direct Appraiser or Organization Approver to exist for User CSV upload" is enabled then it is required that the Direct Appraiser's User ID should already exist in the system or the non-existing Direct Appraiser has to be defined for creation in a row that is before assigning the Direct Appraiser to a user within the CSV file. If the option is disabled, then it is not required that the Direct Appraiser's User ID should already exist in the system.</p> <p>System will not automatically create the missing user.</p>	None	*NONE*
Email	E-mail Address	Valid E-mail (Max field length:150)	None	*NONE*
Employee Num	Employee Number	Any Text (Max field length:85)	None	*NONE*
EmploymentCountryCode	Contact Info - Country	Any Text (Max field length:3) Note: ISO 3166-1 alpha-3	None	
ExpirationDate	Expiration Date	<p>The following date formats are supported: dd-mm-yy (e.g. "31-12-13")</p> <p>dd-mm-yyyy (e.g. "31-12-2013")</p> <p>dd-mmm-yy (e.g. "31-dec-13")</p> <p>dd-mmm-yyyy (e.g. "31-dec-2013")</p> <p>A string of "NONE" implies no specified date.</p> <p>For dd-mm-yy and dd-mmm-yy formats where the year component may be ambiguous, the date is assumed to be in the past unless it results in a date that is over 80 years ago, in which case it will be assumed to be a date in the future.</p>	None	*NONE*

ExternalAuthentication	External Authentication	"Y" or "N"	N	
FamilyName	Surname or Last Name	Any Text (Max field length:85)	None	
Gender	Gender	Any Text (Max field length:1)	None	
GivenName	First Name	Any Text (Max field length:85)	None	
HR Mgr	For E-mails / Approvals	Any Text (Max field length:85) Special Cases	None	*NONE*
HR Mgr Email	For E-mails / Approvals	Any Text (Max field length:85)	None	*NONE*
LanguagePref	Language	ISO 2-char codes: en, fr_CA, es_ES,...	None	
ManagerName	Manager Name	Any Text (Max field length:85)	None	*NONE*
ManagerEmail	Manager E-mail	Any Text (Max field length:85)	None	*NONE*
Job Title	Title of Employee	Any Text (Max field length:85)	None	
Join Date(dd-mmm-yy)	Date the Employee Joined the Company	<p>The following date formats are supported: dd-mm-yy (e.g. "31-12-13")</p> <p>dd-mm-yyyy (e.g. "31-12-2013")</p> <p>dd-mmm-yy (e.g. "31-dec-13")</p> <p>dd-mmm-yyyy (e.g. "31-dec-2013")</p> <p>A string of "NONE" implies no specified date.</p> <p>For dd-mm-yy and dd-mmm-yy formats where the year component may be ambiguous, the date is assumed to be in the past unless it results in a date that is over 80 years ago, in which case it will be assumed to be a date in the future.</p>	None	*NONE*
Location Code	Location Code	Any Text (Max field length:85)	None	*NONE*
MiddleName	Middle Name	Any Text (Max field length:85)	None	*NONE*

Mobile	Contact Info - Mobile	Any Text (Max field length:85)	None	*NONE*
OtherName	Middle Name	Any Text (Max field length:85)	None	*NONE*
Password	LMS Native Password	Any string that meets the system-configured password security requirements Use the "*GENERATE*" value for a system-generated password to be included in the New Welcome User email for a newly created user.	None	*GENERATE*
Personal Title	Title of the Person (Mr., Mrs., Dr.)	Any of Currently Defined Titles	None	*NONE*
Phone	Phone Number	Any Text (Max field length:85)	None	*NONE*
PostalCode	Contact Info - Postal Code / ZIP	Any Text (Max field length:50)	None	*NONE*
Province State	Contact Info - Province / State	Any Text (Max field length:50)	None	*NONE*
Skin	Skin	Skin Name	System Default	
Status	User Account Status	"active" for Active "suspend" for Suspended "close" for Closed "delete" for Logically Deleted	Active	
TeleFax	Contact Info - Telefax	Any Text (Max field length:85)	None	*NONE*
TimeZone	Time Zone	Time zone ID	None	
Email Forwarding	E-mail Forwarding	Must be "N", "D", "H", "O", "E" (N/A, Direct Appraiser, HR Manager e-mail, Organization Approver, E-mail address as entered below)	N	
Forwarding Email Address	Alternative Mail	Valid E-mail (Max field length:150)	None	*NONE*
User Option 1	User Option 1	Any Text (Max field length:100)	None	*NONE*
User Option 2	User Option 2	Any Text (Max field length:100)	None	*NONE*

User Option 3	User Option 3	Any Text (Max field length:100)	None	*NONE*
UserRole	User Role ID	Any Text (Max field length:85)	None	
AdditionalRoles	Additional Roles	A list of Role IDs separated by a space e.g. "S G M D" or just ONE letter e.g. "S". This column is ignored if the System Configuration option 'Allow additional roles' is disabled.	None	*NONE*
AssignRoles	Assign Roles	A list of Role IDs separated by a space e.g. "S G M D" or just ONE letter e.g. "S". This column is ignored if the System Configuration option 'Allow additional roles' is disabled.	None	
UnassignRoles	Unassign Roles	A list of Role IDs separated by a space e.g. "S G M D" or just ONE letter e.g. "S". This column is ignored if the System Configuration option 'Allow additional roles' is disabled.	None	
UserAttr1	User-Defined Attribute 1	If configured as drop-down boxes, value should be user attribute code, max field length:85. Otherwise, max field length: 1,000	None	
UserAttr2	User-Defined Attribute 2	If configured as drop-down boxes, value should be user attribute code, max field length:85. Otherwise, max field length: 1,000	None	
UserAttr3	User-Defined Attribute 3	If configured as drop-down boxes, value should be user attribute code, max field length:85. Otherwise, max field length: 1,000	None	
UserAttr4	User-Defined Attribute 4	If configured as drop-down boxes, value should be user attribute code, max field length:85. Otherwise, max field length: 1,000	None	

UserAttr5	User-Defined Attribute 5	If configured as drop-down boxes, value should be user attribute code, max field length:85. Otherwise, max field length: 1,000	None	
UserAttr6	User-Defined Attribute 6	If configured as drop-down boxes, value should be user attribute code, max field length:85. Otherwise, max field length: 1,000	None	
UserAttr7	User-Defined Attribute 7	If configured as drop-down boxes, value should be user attribute code, max field length:85. Otherwise, max field length: 1,000	None	
UserAttr8	User-Defined Attribute 8	If configured as drop-down boxes, value should be user attribute code, max field length:85. Otherwise, max field length: 1,000	None	
UA-label.Add	User-Defined Attribute Extension (if there are any)	Any Text (Max field length:85)	None	
initialURL	First Screen	Screen ID must be a number (Home - 0, Learn - 2, Current Modules - 3, Enrollment Approval - 10, Manage - 11, Learning Path - 12, Catalog Browser - 13, Catalog Search - 14, Records/Transcript - 15, Career Center Summary - 16, Dashboard - 17, Review - 18, Session Administration - 19)	System Default	
NewUserId	New User ID	A Unique ID That Conforms to PeopleFluent LMS ID constraints	None	
Content Server	Content Server Name	Value should correspond to a Content Server Name	No content server	
Supervised Groups	User groups supervised by the User	User group names separated by vertical bars, e.g., group1 group2 group3	None	*NONE*

Supervised Organizations	Supervised Organizations	Full organization hierarchy to be supervised by the user in question with level codes separated by forward slash, use vertical bar to separate between multiple hierarchies, e.g., ROOT/level1org/level2org ROOT/level2org/level3org	None	*NONE*
User Profile Account	User Profile Account	"Y" or "N"	N	
JobProfiles	Job Profiles	A list of job profile reference codes, separated by vertical bars, e.g., ENGINEER IT_CONSULTANT	None	*NONE*
User Group	User Groups where User is specifically identified as a member	A list of User Group Names, separated by vertical bars, e.g., group1 group2 group3	None	*NONE*
SendResetPasswordMail	Reset Password with System-Generated Password	"Y" or "N" Reset password on an existing user using a system-generated password to be included in the New Password email. This is applicable for Update action and any Password value defined is ignored. Ensure that it's an one-time update on an existing user instead of a recurring user update job.	N	
Level1Code	Org Hierarchy Level 1 Code	Any Text (Max field length:85)	Unassigned	
Level1Desc	Org Hierarchy Level 1 Description	Any Text (Max field length:85)	None	
Level1ApproverID	Organization Level 1 Approver	It is required that the User ID already exists in the system. If not, the non-existing Approver has to be defined for creation in a row that is before assigning the Approver to a new organization within the CSV file.	None	

Level2Code	Org Hierarchy Level 2 Code	Any Text (Max field length:85)	Unassigned	
Level2Desc	Org Hierarchy Level 2 Description	Any Text (Max field length:85)	None	
Level2ApproverID	Organization Level 2 Approver	It is required that the User ID already exists in the system. If not, the non-existing Approver has to be defined for creation in a row that is before assigning the Approver to a new organization within the CSV file.	None	
Level3Code	Org Hierarchy Level 3 Code	Any Text (Max field length:85)	Unassigned	
Level3Desc	Org Hierarchy Level 3 Description	Any Text (Max field length:85)	None	
Level3ApproverID	Organization Level 3 Approver	It is required that the User ID already exists in the system. If not, the non-existing Approver has to be defined for creation in a row that is before assigning the Approver to a new organization within the CSV file.	None	
Level4Code	Org Hierarchy Level 4 Code	Any Text (Max field length:85)	Unassigned	
Level4Desc	Org Hierarchy Level 4 Description	Any Text (Max field length:85)	None	
Level4ApproverID	Organization Level 4 Approver	It is required that the User ID already exists in the system. If not, the non-existing Approver has to be defined for creation in a row that is before assigning the Approver to a new organization within the CSV file.	None	
Level5Code	Org Hierarchy Level 5 Code	Any Text (Max field length:85)	Unassigned	

Level5Desc	Org Hierarchy Level 5 Description	Any Text (Max field length:85)	None	
Level5ApproverID	Organization Level 5 Approver	It is required that the User ID already exists in the system. If not, the non-existing Approver has to be defined for creation in a row that is before assigning the Approver to a new organization within the CSV file.	None	

The loader also supports the setting of User Attributes. To update a User Attribute, add a column with header consisting of the Attribute Code prefixed by "UA-".

Validation

Add New Users:

- Ensure that the data contained in the CSV conforms to the formatting required by the template as specified in the table below. Do not insert commas as these will cause subsequent data to be treated as a separate column.
- If a new user is to be assigned to a particular organization structure, ensure that the entire organization hierarchy is included in the CSV. This could be a new or existing structure. For example, in an organization with four levels, you must include specifications for levels 1, 2, 3, and 4. You may not omit definitions for intermediate levels (i.e., Levels 2 or 3). Note that "n" levels are supported, although only 5 are shown below.
- If an organization structure is not specified (i.e., levels and descriptions are left blank), the profile organization structure will be used if the option to use a profile has been checked. If a profile is not used, the user will be created with an organization structure of "Unassigned".
- If an organization description for a certain level is entered but the corresponding description code is not, then the organization level will not be added. A warning message will appear in the log file.
- When adding, the mandatory fields are: Action, UserID, FamilyName, GivenName, Password

- The length of the password field is specified in the system customization settings.
 - If the password field is left blank when adding system defaults, the system default password will be used.
 - If you use a profile during a data upload, the password defined in the profile will be used
- Personal Title: Talent Suite will check the format of this field to ensure that it complies with one of the valid, predefined titles (e.g. Mr., Mrs., Dr.). If the personal title specified in the uploaded file does not match one of the predefined titles, the system will default to NONE.

Updating existing users:

- Ensure that the data contained in the CSV conforms to the formatting required by the template as specified in the table below. Do not insert commas as these will cause subsequent data to be treated as a separate column.
- Profiles are not used when updating existing users even if the option is checked.
- Incorrectly formatted records will be rejected as invalid data.
- When updating the only mandatory fields are: Action and User ID.

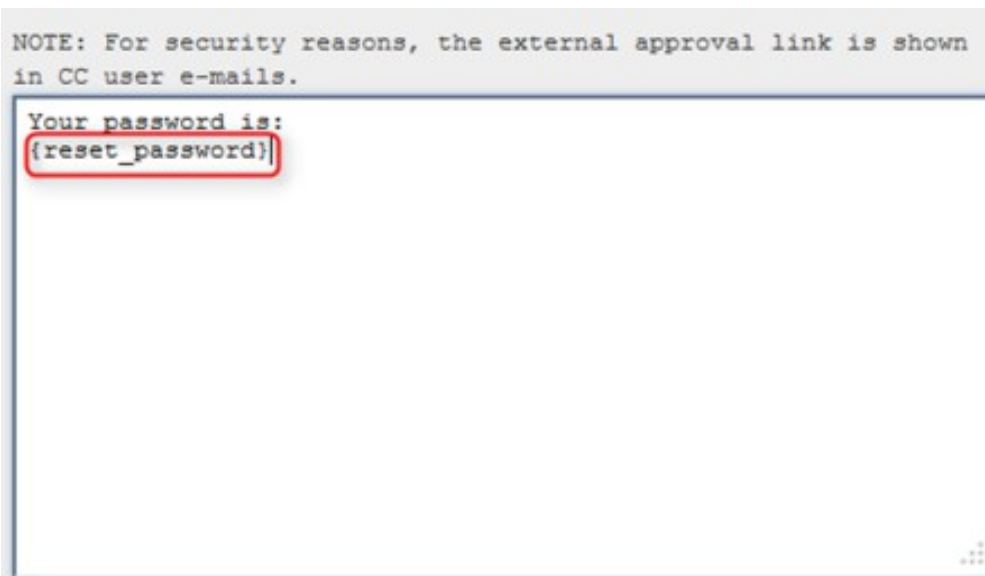
	Error	Corrective Action
1	Invalid User ID format	Ensure that all User ID's have a maximum length of 85 characters, that there are no spaces, and that only valid alphanumeric characters are used
2	Adding users to other organizations is not allowed	Log in as System Administrator to import the data or disable "Enforce Partitioning by Level 1 Organizations"
3	Assigning users to an inaccessible organization is not allowed	Log in as Uploader that has Role with Highest Organization Level Visible higher than or equal to the organization level that users are being moved to in the file
4	Updating users from an inaccessible organization is not allowed	Log in as Uploader that has Role with Highest Organization Level Visible higher than or equal to the organization level at which users being updated in the file sit
5	Creating organizations in an inaccessible area is not allowed	Log in as Uploader that has Role with Highest Organization Level Visible higher than or equals to the organization level that is being created via the upload
6	Deleting users from an inaccessible organization is not allowed	Log in as Uploader that has Role with Highest Organization Level Visible higher than or equal to the organization level at which the users being deleted in the file sit
7	Multiple assignments found for User ID: 'X', please specify an Assignment ID	Identify X's assignment ID that should be used and insert it in the appropriate column and/or format

8	More than one special character ^	Remove this cell value to allow the rest of the row to be processed. The property will need to be configured manually.
9	Additional Role Column Format Incorrect	Check the values in AdditionalRoles, AssignRoles, and UnassignRoles columns adhere to the specified format
10	FAILED. The importer (User ID "{user ID}") does not have permissions to add the User Role ID "{role ID}"	Perform the data load with a log in that has read permission to the role or grant read permission to the Role for the logged in user

Option to Auto Generate Password when Using the User CSV Loader

When a user is ADDED via the User CSV Loader and the password field is set to `"*GENERATE*"`, a random generated password will be saved and sent to the user via a New User Welcome E-mail if one is configured. An administrator can set up an e-mail template with the "Reset Password"

`{reset_password}` parameter in the E-mail Template Editor and configure it as the New User Welcome E-mail in System Configuration.



User Profile CSV Loader

Supported Fields

Field	Content	Data Handling
Action	Control Action (Either Add or Delete)	<p>Must be one of the following:</p> <ul style="list-style-type: none"> 'AR' (Add Relocation Interest Information) 'AE' (Add Education Record) 'AW' (Add Work History Record) 'AL' (Add Language Skills Record) 'DR' (Delete Relocation Information) 'DE' (Delete Education Records matching criteria specified in Education columns, delete all records if no criteria set) 'DW' (Delete Work History Records matching criteria specified in Work History columns, delete all records if no criteria set) 'DL' (Delete Language Skills Records matching criteria specified in Language Skills columns, delete all records if no criteria set) <p>Note that when Add action is specified, only columns related to the type would be considered when importing.</p>
User ID	User ID	A unique ID that conforms to PeopleFluent LMS ID constraints (maximum 85 characters). Mandatory Field.
Relocation Willingness	Willingness to Relocate	'Y', 'N' or Blank (Not specified)
Desired Location	Desired Relocation Location	Any text (Max field length:250)
Financial Assistance Needed	Relocation Financial Assistance Required	'Y' or 'N'
Relocation Reason	Relocation Reason	Any text

Education - Start Date	Education Start Date	<p>Must be in dd-MMM-yyyy or dd-MMM-yy format, e.g. 20-Jun-2007 or 20-Jun-07. A string of 'NONE' implies no specified date. Where only two digits are specified for the year, the date will be interpreted as belonging in a range beginning 80 years before the current date, and ending 20 years after. For example, for an import performed on 20 June 2007, a value of 20-Jun-26 would be interpreted as denoting a date in the year 2026 (i.e. 19 years after the import date), while a value of 20-Jun-28 would be interpreted as denoting a date in the year 1928 (i.e. 79 years before the import date). Mandatory if Action = 'AE'.</p>
Education - End Date	Education End Date	<p>Must be in dd-MMM-yyyy or dd-MMM-yy format, e.g. 20-Jun-2007 or 20-Jun-07. A string of 'NONE' implies no specified date. Where only two digits are specified for the year, the date will be interpreted as belonging in a range beginning 80 years before the current date, and ending 20 years after. For example, for an import performed on 20 June 2007, a value of 20-Jun-26 would be interpreted as denoting a date in the year 2026 (i.e. 19 years after the import date), while a value of 20-Jun-28 would be interpreted as denoting a date in the year 1928 (i.e. 79 years before the import date). Mandatory if Action = 'AE' and Present Education = 'N'.</p>
Education - Present	Whether the education record is present	'Y' or 'N'. Education End Date is mandatory if 'N' is entered.
Education - Institution	Institution Name	Any text (Max field length:250). Mandatory if Action = 'AE'.
Education - Degree	Degree	Any text (Max field length:250). Mandatory if Action = 'AE'.
Education - Field of Study	Field Of Study	Any text (Max field length:250). Mandatory if Action = 'AE'.
Education - Location	Institution Location	Any text (Max field length:250)

Work - Start Date	Work Start Date	<p>Must be in dd-MMM-yyyy or dd-MMM-yy format, e.g.</p> <p>20-Jun-2007 or 20-Jun-07. A string of 'NONE' implies no specified date. Where only two digits are specified for the year, the date will be interpreted as belonging in a range beginning 80 years before the current date, and ending 20 years after. For example, for an import performed on 20 June 2007, a value of 20-Jun-26 would be interpreted as denoting a date in the year 2026 (i.e. 19 years after the import date), while a value of</p> <p>20-Jun-28 would be interpreted as denoting a date in the year 1928 (i.e. 79 years before the import date). Mandatory if Action = 'AW'.</p>
Work - End Date	Work End Date	<p>Must be in dd-MMM-yyyy or dd-MMM-yy format, e.g.</p> <p>20-Jun-2007 or 20-Jun-07. A string of 'NONE' implies no specified date. Where only two digits are specified for the year, the date will be interpreted as belonging in a range beginning 80 years before the current date, and ending 20 years after. For example, for an import performed on 20 June 2007, a value of 20-Jun-26 would be interpreted as denoting a date in the year 2026 (i.e. 19 years after the import date), while a value of</p> <p>20-Jun-28 would be interpreted as denoting a date in the year 1928 (i.e. 79 years before the import date). Mandatory if Action = 'AW' and Present Work = 'N'.</p>
Work - Present	Whether the work record is present	'Y' or 'N'. Work End Date is mandatory if 'N' is entered.
Work - Job Title	Job Title	Any text (Max field length:250). Mandatory if Action = 'AW'.
Work - Company Name	Company Name	Any text (Max field length:250). Mandatory if Action = 'AW'.
Work - Employment Status	Employment Status	'F' (Full-time), 'P' (Part-time), or 'I' (Intern). Mandatory if Action = 'AW'.
Work - Key Achievements	Key Achievements	Any text
Work - Awards	Awards	Any text
Work - Location	Work Location	Any text (Max field length:250). Mandatory if Action = 'AW'.
Language	Language	Any text (Max field length:250). Mandatory if Action = 'AL'.
Read	Read Level	'1' (Native), '2' (Fluent), '3' (Intermediate), '4' (Elementary), or '5' (Not Specified)

Write	Write Level	'1' (Native), '2' (Fluent), '3' (Intermediate), '4' (Elementary), or '5' (Not Specified)
Speak	Speak Level	'1' (Native), '2' (Fluent), '3' (Intermediate), '4' (Elementary), or '5' (Not Specified)

Merge User IDs Data Loader

Merge user accounts by specifying the Source User ID and the Target User ID to a target account.

Supported Fields

Field	Content	Data Handling	Default
SourceUserID	Source User ID	Mandatory User ID of a User in the System (maximum 85 characters)	None
TargetUserID	Target User ID	Mandatory User ID of a User in the System (maximum 85 characters)	None

Validation

	Error	Cause	Corrective Action
1	Multiple enrollments for the same session	Both Source and Target have been enrolled onto the same module session.	Where both Source and Target Users have been enrolled onto a Session, ensure that only one enrollment, either Source or Target, is active at the merge time. The other enrollment should be withdrawn or similar.
2	User booked into repeated sessions	Both Source and Target have been enrolled onto the same module but different sessions.	

After the merge process, records of the Source User ID (excluding Preferences and Basic Properties) will be passed to the Target ID, and the Source User ID will be deleted.

User Group CSV Loader

Loader Specific Settings

- Create any new user groups found in the CSV file.

Supported Fields

Field	Content	Data Handling	Default
Action	Control Action (Either Add or Delete)	Must be "A" or "D" (Add or Delete as appropriate)	None
GroupName	User Group Name	A Unique ID That Conforms to PeopleFluent LMS ID constraints (maximum 85 characters)	None
UserID	User ID	A Unique ID That Conforms to PeopleFluent LMS ID constraints (maximum 85 characters)	None

Program CSV Loader

Loader Specific Settings

"Instructors Notified When a Class/Session Assignment Changes": You can ensure instructors are notified of changes in assignments using the "Send Notifications to Instructors who have been assigned/deassigned to sessions" checkbox. The email templates used for these notifications are configured in using the "Instructor Assigned to Class E-mail Template" and "Instructor Deassigned from Class E-mail Template" System Configurations.

Supported Fields

CSV Header	Mandatory Field	Default Value	Item as Specified in Catalog Editor	Value
Action	Y	None		A/U/D
ProgramID	Y	None	Module ID	A Unique ID That Conforms to PeopleFluent LMS ID constraints (maximum 85 characters)
ProgramTitle	N	None	Course Title	Any Text (Max field length:255)
ProgramDescription	N	None	Course Description	Any Text (Max field length:None)
ProgramMoreInfoHyperlink	N	None	More Information Hyperlink	Any Text (Max field length:500)
ProgramDurationComments	N	None	Duration Comments	Any Text (Max field length:100)
ProgramSubject	N	None	Subject	Name of a Predefined Course Subject Any Text (Max field length:50)
ProgramImage	N	None	Image for Catalog Display	A valid URL for an image, e.g., http://www.abc.com/abc.png or/ekp/nd/fresco/repository/EKP0002343.jpg Any Text (Max field length:100)
ProgramShowInCatalog	N	N	Show in catalog	"Y" or "N"

ProgramArchive	N	N	Archive	"Y" or "N"
ProgramArchiveDate	N	None	Auto-Archive Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.
ProgramPeerComments	N	Y	Allow peer review/ comments	"Y" or "N"
ProgramChargeType	N	No charge	Module Charge Procedure	Must be one of: NONE - No charge. PER REG - Charged per Registration ONLINE - Online Payment
ProgramCost	N	None	Course Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55
ProgramCurrency	N	None	Module Charge Currency	A three letter currency code, e.g., GBP or USD
ProgramPriceInfo	N	None	Currency Cost Price Info	Any Text (Max field length:300)
ProgramTokenCost	N	None	Token Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55
ProgramTokenPriceInfo	N	None	Token Cost Price Info	Any Text (Max field length:300)
ProgramLanguage	N	None	Language	Name of a Predefined Course Language or ISO 2-char codes, e.g., en, fr_CA, es_ES Any Text (Max field length:50)
ProgramVendor	N	None	Vendor	Name of a Predefined Course Vendor Any Text (Max field length:255)

ProgramCertification	N	None	Certification Name	Name of a Predefined Certification Any Text (Max field length:1,000)
ProgramExams	N	None	Exams	List of predefined exam IDs, delimited by vertical bars, e.g., EXAM1 EXAM2 EXAM3
ProgramExamsMandatory	N	N	Exams are mandatory.	"Y" or "N"
ProgramExamCompletesModule	N	N	Passing exam(s) automatically completes this module	N - No Y - Any of the selected exams. A - All of the selected exams.
ProgramEvaluation	N	None	Evaluation	Exam ID of Predefined Evaluation
ProgramEvalMandatory	N	N	Mandatory Evaluation	"Y" or "N"
ProgramCatalogs	N	None	Assign course to catalogs	A list of catalog names, each of which may be hierarchical, separated by a vertical bar, e.g., A/B/C1 A/B/C2
ProgramAudience	N	None	Audience	List of descriptions delimited by vertical bars (" "). Each description has a maximum length of 255.
ProgramObjectives	N	None	Objectives	List of descriptions delimited by vertical bars (" "). Each description has a maximum length of 2,000.
ProgramAllowUserWithdraw	N	Y	Allow user to WITHDRAW	"Y" or "N"
ProgramUserWithdraw Reason	N	N	Prompt user for reason for the withdrawal	"Y" or "N"

ProgramAllowUser Complete	N	Y	Allow user to mark Completed (Self-Asserted)	"Y" or "N"
ProgramAllowStatus Change	N	N	Allow status changes to be made at any time (e.g., ignore standard business rules)	"Y" or "N"
ProgramAllowReEnroll	N	Y	Allow re-enrollment	"Y" or "N"
ProgramEnrollment Policy	N	None	Enrollment Policy	Name of a Predefined Enrollment Policy Any Text (Max field length:50)
ProgramRetake	N	Y	Share/Credit enrollment	Where a component module/program or its equivalent has been completed by the learner prior to enrolling on this program. "Y" if program completion requires the learner to retake the learning; "N" if program completion does not require the learner to retake the learning.
ProgramShareCreditsValidityPeriod	N	0	Validity of Learning	Whole positive number or zero
ProgramKcEnable	N	Y	Enable the Knowledge Center for this module	"Y" or "N"
ProgramKcShowPicture Area	N	Y	(KC) AREA: Show picture area	"Y", "N" or "I" ("I", Knowledge Center show picture area configuration inherits from catalog setting)

ProgramKcPicture	N	None	KC Picture URL	A valid URL for an image, e.g., http://www.abc.com/abc.png or /ekp/nd/fresco/repository/EKP0002343.jpg Any Text (Max field length:255)
ProgramKcAllowCourseLaunch	N	Y	Allow module launches in KC	"Y" or "N"
ProgramKcCourseLink	N	N	Course link always launches the KC instead of the course.	"Y" or "N"
ProgramKcAssessmentWorkflow	N	Y	(KC) AREA: Show assessment workflow area	"Y" or "N"
ProgramKcCertification	N	Y	(KC) AREA: Show certification area	"Y" or "N"
ProgramKcContactList	N	Y	(KC) AREA: Show contact list area	"Y" or "N"
ProgramKcCourseSummary	N	Y	(KC) AREA: Show course summary area	"Y" or "N"
ProgramKcEvaluation	N	Y	(KC) AREA: Show evaluation area	"Y" or "N"
ProgramKcForum	N	Y	(KC) AREA: Show forum area	"Y" or "N"
ProgramKcInstructorList	N	Y	(KC) AREA: Show instructor list area	"Y" or "N"
ProgramKcNews	N	Y	(KC) AREA: Show news area	"Y" or "N"
ProgramKcNotepad	N	Y	(KC) AREA: Show notepad area	"Y" or "N"
ProgramKcPeerComments	N	Y	(KC) AREA: Show peer comments area	"Y" or "N"
ProgramKcReferences	N	Y	(KC) AREA: Show references area	"Y" or "N"

ProgramKcStatusChange	N	Y	(KC) AREA: Show status change area	"Y" or "N"
ProgramKcExam	N	Y	(KC) AREA: Show exam area	"Y" or "N"
ProgramKcInstructorAboutMe	N	Y	(KC) AREA: Show About Me for the instructor	"Y" or "N"
ProgramKcInstructorReferences	N	Y	(KC) AREA: Show reference share area for instructors	"Y" or "N"
ProgramKcFileShare	N	N	(KC) AREA: Show file share area	"Y" or "N"
ProgramKcHomeworkDropBox	N	N	(KC) AREA: Show homework drop box	"Y" or "N"
ProgramKcMarkedHomework	N	N	(KC) AREA: Show marked/reviewed homework	"Y" or "N"
ProgramKcTranscript	N	Y	(KC) AREA: Show transcript area	"Y" or "N"
ProgramKcQuickEvaluation	N	N	(KC) AREA: Show quick evaluation area	"Y" or "N"
ProgramKcShowModuleAttributes	N	Y	(KC) AREA: Show Module Attributes	"Y" or "N"
ProgramCreateWikiSpace	N	N	Create Wiki Space	"Y" or "N"
ProgramWikiSpaceName	N	Course Title	Wiki Space Name	Any Text (Max field length:None)
PermReplace	N	N	Permissions Action	"Y" - to completely replace permission settings on this course using permissions from the "master template". "N" - to add to existing permission settings on this course using permissions from the "master template".

PermTemplateID	N	None	Permissions Template	Learning object ID whose permissions are used as a "master template" for this course
ProgramRequireESignatures	N	N	Require eSignatures	"Y" or "N"
ProgramSupport Contact	N	None	Program Support Contact	Any Text (Max field length:255)
SessionID	N	None	Session Code	Any Text (Max field length:15)
SessionTitle	N	None	Session Title	Any Text (Max field length:255)
SessionDescription	N	None	Session Description	Any Text (Max field length:None)
SessionStatus	N	Observe System Configuration setting	Session Status	Must be one of: active - Active pending - Pending completed - Completed closed - Closed cancelled - Cancelled invitation - Invitation Only prompt - Prompt user to select session. retired - Retired ended - Ended
SessionLanguage	N	Auto-Select	Delivery Language	Name of a Predefined Course Language or ISO 2-char codes, e.g., en, fr_CA, es_ES or *AUTO* Any Text (Max field length:50)
SessionDeadlineDays	N	None	Completion Deadline (Days)	Days from Enrollment (0 implies unlimited)
SessionDeadlineDate	N	None	Completion Deadline (Date)	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.

SessionDeadlineHandling	N	N	Completion Deadline Handling	<p>N - Do nothing, the deadline was just for reference</p> <p>Y - Set transcript to DEADLINE EXPIRED and block learner from launching the course</p> <p>B - Block learner from launching other courses until they complete this course</p>
SessionChargeType	N	Use Module Configured Settings	Session Charge Procedure	<p>Must be one of:</p> <p>NONE - No charge.</p> <p>PER REG - Charged per Registration</p> <p>MODULE - Use Module Configured Settings</p> <p>ONLINE - Online Payment</p>
SessionCost	N	None	Session Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55
SessionCurrency	N	None	Session Charge Currency	A three letter currency code, e.g., GBP or USD
SessionPriceInfo	N	None	Session Level Currency Cost Price Info	Any Text (Max field length:300)
SessionTokenCost	N	None	Session Level Token Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55
SessionTokenPriceInfo	N	None	Session Level Token Cost Price Info	Any Text (Max field length:300)

SessionCostCalculation	N	Use amount specified above	Program Cost Calculation	<p>Must be one of:</p> <p>SESSION COST - Use amount specified above</p> <p>TOTAL COST - Use total cost of modules in program session (individual debit transactions and a zero debit transaction for the program)</p>
SessionTimeZone	N	System Time Zone	Session Level Time Zone	Time zone ID
SessionInstructors	N	None	Session Instructor List	List of user IDs belonging to instructors to be assigned to the session, separated by vertical bar, e.g. instr1^assignmentId1 instr2^assignmentId2 instr3^assignmentId3
SessionStart	N	None	Session Level Enrollment Start Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.
SessionEnd	N	None	Session Level Enrollment End Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.
SessionApprovers	N	None	Session Approver List	Up to two user IDs belonging to approvers to be assigned to the session, separated by vertical bar (e.g., appr1^assignmentId1 appr2^assignmentId2)

SessionPayment	N	N	For program modules with payment configured, enforce payment before first launch.	"Y" or "N"
SessionOrdered	N	N	Modules cannot be accessed until all preceding modules are completed.	<p>"N", "Y", "YF", "YH", or "YFH"</p> <p>"N" and "Y" are for disabling and enabling the option respectively.</p> <p>Appending an "F" will enable the "Allow learner to advance to next order on failing preceding learning" sub-option. Excluding it implies it should be disabled.</p> <p>Appending an "H" will enable the "Hide modules blocked by preceding modules in Learner's Available Modules" sub-option. Excluding it implies it should be disabled.</p>
SessionRevision	N	N	Program completion requires modules to be on Effective/ Approved revision	"Y" if program completion requires modules to be on Effective/Approved revision, otherwise "N"
SessionCredits	N	Y	Use predefined credits	"Y" or "N"
SessionNumberCredits	N	0	Required Credits for Elective Modules	Number
SessionPassingScore	N	0.0	Passing Score	Positive Number
SessionAssessmentWorkflowTemplate	N	None	Session Assessment Workflow Template Name	Name of a Predefined Assessment Workflow Template (*NONE* to clear)

SessionDisableWorkflowAssignment	N	N	Disable workflow assignment for the session	"Y" or "N"
SessionAssignedModuleID	N	None	Assigned module	Course ID of Selected Course
SessionAssignedModuleSessionID	N	None	Session	Session code for nonprogram type modules; session ID for program type modules
SessionAssignedModuleWeight	N	0.0	Weighting	Positive Number
SessionAssignedModuleOrder	N	0	Order	Integer between 0 and 127
SessionAssignedModuleCredits	N	0	Credits	Number
SessionAssignedModule Required	N	Y	Required	"Y" or "N"
SessionAssignedModuleEnrollment	N	Y	Auto-enroll when available	"Y" or "N"
SessionAssignedModuleAvailability	N	P(0D)	Available for self-enrollment	<p>One of:</p> <p>"P(1D)" where "1" can be replaced by any non-negative integer to denote the number of days after Parent Program Enrollment for availability</p> <p>"O(2D)" where "2" can be replaced by any non-negative integer to denote the number of days after advancing to the module order for availability</p> <p>"D(2016-01-31 17:00:00)" where "2016-01-31 17:00:00" can be replaced by any date in the same yyyy-MM-dd HH:mm:ss format from which the module will be available</p>

<p>SessionAssignedModule Deadline</p>	<p>N</p>	<p>I</p>	<p>Progress Tracking Deadline</p>	<p>One of "I" Inherit from program deadline "P(1D)" where "1" can be replaced by any natural integer to denote the number of days after Parent Program Enrollment as a deadline "M(2D)" where "2" can be replaced by any natural integer to denote the number of days after Assigned Module Enrollment as a deadline "D(2016-01-31 17:00:00)" where "2016-01-31 17:00:00" can be replaced by any date in the same yyyy-MM-dd HH:mm:ss format as a fixed date deadline</p>
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External Training CSV Loader

External Training Records relate to training that does not exist as LMS Learning Objects. Such records are listed for end-users under their "External Training Records" tab in "Learning". The External Training CSV Loader allows creation, updating, and deletion of user external training in the LMS.

Adding New Records:

- When adding external training records, the mandatory fields are: Action, UserId, Title
- The record ID field is optional when adding a new record as the system will generate a unique key automatically. If one is provided as an external system reference the value will be used (and will of course be rejected if already in use).

Updating existing records:

- To update an individual's record, a minimum of the action and record ID are required, plus any other fields to be modified.

Deleting existing records:

- To delete an individual's record, only the action and record ID are required.

Supported Fields

Field	Content	Data Handling	Default
Action	Control Action(Either Add, Delete or Update)	Must be "A", "D", "U", or "AU" (Add, Delete, Update, Add or Update as appropriate)	None
RecordID	Record ID	A Unique ID That Conforms to PeopleFluent LMS ID constraints (maximum 15 characters)	None
UserId	User ID	A Unique ID That Conforms to PeopleFluent LMS ID constraints (maximum 85 characters)	None
Title	Title	Any Text (Max field length:255)	None

CourseType	Learning Type	<p>Must be one of:</p> <p>TNS - (not specified) C - Program</p> <p>R - Classroom O - Online</p> <p>W - Workshop/Seminar (maximum 1 characters)</p>	None
StartDate	Start Date	<p>Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.</p>	None
EndDate	End Date	<p>Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.</p>	None
Status	Status	<p>Must be one of:</p> <ul style="list-style-type: none"> - Open for editing - Pending Approval - Approved - Approval Denied - Completed - Cancelled 	OPEN_FOR_EDITING
Subject	Subject	<p>Name of a Predefined Course SubjectAny Text (Max field length:50)</p>	None
Grade	Grade	Any Text (Max field length:None)	None
Score	Score	Any Text (Max field length:None)	None
TrainingHours	Duration(Training hours)	A decimal value with up to two decimal places, e.g., 12.50 or 5.25	0
Cost	Course Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
Currency	Module Charge Currency	A three letter currency code, e.g., GBP or USD	None

Language	Language	ISO 2-char codes: en, fr_CA, es_ES,...	None
VendorInfo1	Vendor Information	Any Text (Max field length:None)	None
Comments	Comments	Any Text (Max field length:None)	None

Training Records CSV Loader

This loader is related to training history for learning objects that exist in the LMS.

Loader Specific Settings

- "Create Learning objects for new Learning IDs found in the file": If the training records relate to courses that are not yet in the LMS, enabling "Create Learning objects for new Learning IDs found in the file" will have learning objects created automatically. The default value for this option is defined by the System configuration: "Automatically create learning objects when using dataloader". If this option is checked, the system will create Learning Objects for the given information. Otherwise, it will report an error if learning object id is not right or updates the record.
- "Skip Enrollment Checks": The standard enrollment process involves checks against prerequisites, seat numbers, approvals, etc., which can be very resource-intensive. When uploading historical records for which such checking is unnecessary, enabling the "Skip enrollment checks" will bypass any checking and insert records into the database directly, invoking the same importer as the "turboTrainingHistory" OPML type. Using the loader in this mode has the following differences:
 - Updating of training records is not supported.
 - DEACTIVATED status is not supported.
 - Program completion is not supported.
 - Cannot create multiple enrollments for the same user and learning module.
 - Awarding competencies and certificates according to definitions at the time of completion is not supported.
 - Learning IDs that do not exist will always result in new Learning Objects being created.
 - A LOTYPE column to indicate the learning type for the record (including top-level programs).
 - An improved load data rate of approximately 8000 records per minute on a test system.
 - Session Update where it allows adding of instructors to old modules.

Supported Fields

Field	Content	Data Handling	Default
USERID	User ID	If blank, a classroom and a session will be created with no associated training record.	None

LEARNINGID	Learning ID	A classroom and session will be created even if there is no USERID tagged to this code	None
LOTITLE	Learning Module Title	A classroom and session will be created even there is no USERID tagged to this name	None
ENROLLDATE	Enrollment Date	The following date formats are supported: dd-mm-yy (e.g. "31-12-13"); dd-mm-yyyy (e.g. "31-12-2013"); dd-mmm-yy (e.g. "31-dec-13"); dd-mmm-yyyy (e.g. "31-dec-2013"). A string of "NONE" implies no specified date. For dd-mm-yy and dd-mmm-yy formats where the year component may be ambiguous, the date is assumed to be in the past unless it results in a date that is over 80 years ago, in which case it will be assumed to be a date in the future.	If not specified, take the start date. If the start date is not specified or is future, take today's date.
STARTDATE	Transcript Detail Start Date	The following date formats are supported: dd-mm-yy (e.g. "31-12-13"); dd-mm-yyyy (e.g. "31-12-2013"); dd-mmm-yy (e.g. "31-dec-13"); dd-mmm-yyyy (e.g. "31-dec-2013"). A string of "NONE" implies no specified date. For dd-mm-yy and dd-mmm-yy formats where the year component may be ambiguous, the date is assumed to be in the past unless it results in a date that is over 80 years ago, in which case it will be assumed to be a date in the future.	None
ENDDATE	Transcript Detail End Date	The following date formats are supported: dd-mm-yy (e.g. "31-12-13"); dd-mm-yyyy (e.g. "31-12-2013"); dd-mmm-yy (e.g. "31-dec-13"); dd-mmm-yyyy (e.g. "31-dec-2013"). A string of "NONE" implies no specified date. For dd-mm-yy and dd-mmm-yy formats where the year component may be ambiguous, the date is assumed to be in the past unless it results in a date that is over 80 years ago, in which case it will be assumed to be a date in the future.	None

STUDENTSTATUS	Transcript Overall Status	<p>If the value is "Pass", the Transcript-Overall Status of the training record will be set to PASSED.</p> <p>If the value is "Completed", the Transcript-Overall Status of the training record will be set to COMPLETED.</p> <p>If the value is "Active", the student will be enrolled to the learning module; the Transcript-Overall Status of the training record will be set to "IN PROGRESS" if there exist STARTDATE, ENDDATE (valid, past or future dates). It will be set to "NOT STARTED" if there are no STARTDATE, ENDDATE (invalid dates or blank dates). For new program enrollments, the Transcript-Overall Status will be set to "COMPLETED" if the learner has already satisfied all program completion requirements.</p> <p>If the value is "Withdrawn", the Transcript-Overall Status of the training record will be set to WITHDRAWN.</p> <p>If the value is "Deactivated", the Transcript-Overall Status of the training record will be set to DEACTIVATED.</p> <p>If the value is "EXEMPT", the Transcript-Overall Status of the training record will be set to "WAIVER/EXEMPT".</p>	None
CREATESESSION	Whether to create session	<p>When no sessions exist at all, a new session will be created regardless of this column value. When "true", a new session will be created. When "false", no session will be created and existing session(s) will be updated based on the SESSIONCODE, STARTDATE, and ENDDATE.</p> <p>This applies only to Classroom, Virtual Classroom and Workshop/Seminar learning types.</p>	False
Training Venue	Facility Code of the Session/Event	If the code provided does not exist, it will not be set. *This value is used only when a new session is created.	None
Instructor	Instructor of Learning Module	If the value provided is not a valid User ID, it will not be set. *This value is used only when a new session is created.	None
SESSIONSTATUS	Learning Module Event Status	Possible values: Active, Complete, Cancelled *This value is used only when a new session is created.	Completed

SESSIONCODE	Session Code of the Session/Event	When updating a session, the session code is used to identify a specific session in a multi-session course. When creating a session, the session will take the specified value. If not specified, a session code will be generated in the format as configured in System Configuration.	None
SESSIONTITLE	Session Title of the Session/Event	This value is used when a new session is created or when session start date and end date are updated.	None
SCORE	Assessment Score	Corresponds to an assessment score that is designed for classroom courses, and users would not get score record if they try to upload data that is related to the online courses.	None
LOTYPE	Learning Type	<p>Possible values are:</p> <ul style="list-style-type: none"> C - Program M - Exam O - Online R - Classroom W - Workshop/Seminar <p>- Self Training (Paper)</p> <p>- Self Training (Video)</p> <p>- Special Interest Group</p> <p>- Coaching</p> <p>*This field will only effective if skip enrollment check is enabled.</p>	None
ACTION	Action	<p>If 'A', the loader will add a learning record for the learner if none exists for the specified module session and start date. If 'U', the loader will update the learner's record for the specified module session. If left blank, the loader will add a learning record for the learner if none exists for the specified module session or update the learner's record if one already exists.</p> <p>This field is not effective if skip enrollment check is enabled.</p>	None
PRESCORE	PRESCORE	Pre-Assessment Score Corresponds to pre-assessment score which is a numeric field.	None
POSTSCORE	POSTSCORE	Post-Assessment Score Corresponds to the post-assessment score of the transcript which is a numeric field.	None

LANGUAGE	Language	Language Name of the predefined Course Language or the assigned language with an ISO 2-char code, e.g., en, fr_CA, es_ES. Applicable for inserting a new transcript record or creating a new session in a specific language. Any Text (Max field length:50)	Primary language
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<p>USE SETTINGS AS OF DATE</p>	<p>Use settings/ data as of that date to create the certification</p>	<p>With CFR license installed, data for description, objectives, audience, and reference resources are taken as of start date of the training record; and settings for issuing a certification are usually taken as of completion date of the training record. You can override this date by specifying the 'as of date-time here.</p> <p>For an initial data migration, the start and completion dates of the records are usually before the date the module was created and a certification was assigned. As of start and completion date, no information was available; the fields stay empty and no certification will be issued for those records. Nevertheless, to create full records and issue certifications for those historical records, you can specify a date and time (at the server) at which the will system take the information.</p> <p>The current date can be used to create the record and certification as of the settings available at upload date or any date in the past when the information is available and which is not before the start or completion date of the record.</p> <p>If no date-time is provided, the system will take the data as of start and completion date of the record.</p> <p>The following date formats are supported:</p> <ul style="list-style-type: none"> • dd-mm-yy (e.g. 31-12-13) • dd-mm-yyyy • dd-mmm-yy (e.g. 31-dec-13) dd-mmm-yyyy <p>You can append the time (at the server) in the following format: hh:mm:ss. For example, 15-09-2020 05:30:00. The time component is optional.</p> <p>For dd-mm-yy and dd-mmm-yy formats where the year component may be ambiguous, the date is assumed to be in the past unless it results in a date that is over 80 years ago, in which case it will be assumed to be a date in the future.</p>	<p>None</p>
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SESSIONTIMEZONE	Session Level Time Zone	Time zone ID	System Time Zone for a new session. Session's original timezone for an existing session.
DEADLINEDAYS	Completion Deadline (Days)	Days from Enrollment (0 implies unlimited)	None
DEADLINE DATE	Completion Deadline (Date)	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.	None
Transfer Session Code	Code of Session to transfer learner to	The Code of a session within the same module to transfer the Learner to. Only applicable when updating an existing enrollment. This field is ignored if "Skip enrollment checks" is enabled.	None
Parent Program ID	The Learning ID of the Program context in which enrollment is intended	Applicable for new enrollments only and ignored when updating a transcript. Learner must already be enrolled on the specified Program and the Session must involve the specified Child Module. This field is ignored if "Skip enrollment checks" is enabled.	None
Performance Grade	Performance Grade ID	List of possible IDs and translated labels Possible values configured: - Excellent - Very Good - Good - Average - Poor (*NONE* to clear)	None

<p>Transcript Attribute Codes, each prefixed with "TR-"</p>	<p>User-defined Transcript Attributes</p>	<p>Free Text and Text Area Attributes: Any text (Max field length:2000)</p> <p>Date Attributes: A valid date in the "yyyy-MM-dd HH:mm:ss" format Numeric Attributes: A number Checkbox Attributes: "Y" or "N"</p> <p>Drop Down Attributes: A drop-down value code as defined in the Drop Down Attribute</p>	<p>None</p>
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- If there is no existing learning module with the specified Learning ID, a new learning module of type Classroom will be created with the specified ID and title; otherwise, the title field of the existing learning module will be updated.
- If the learning module created or updated in the step above has no existing sessions, a new session will be created with the specified start and end dates; otherwise, the behavior will depend on the value of the CREATESESSION column.
- If the value of the CREATESESSION column is "true", a new session will be added.
- Otherwise, the existing session(s) will have their start and end dates updated. (N.B. This is the default behavior if the CREATESESSION column is omitted.)
- The importer will then check whether the student with the specified ID currently has any training records associated with the learning module created in the first step. If there is no previous enrollment record, these records will be updated with the specified Transcript Detail-Start Date, Transcript Detail-End Date and Transcript-Overall Status is:
 - (COMPLETED if the STUDENTSTATUS field contains the value "Pass");
 - (WITHDRAWN if the STUDENTSTATUS field contains the value "Withdrawn");
 - (If the value is "Active", the student will be enrolled to the learning module; the Transcript-Overall Status of the training record will be set to "IN PROGRESS" if there exist STARTDATE, ENDDATE (valid, past or future dates) ;
- The Transcript-Overall Status of the training record will be set to "NOT STARTED" if there are no STARTDATE, ENDDATE (invalid dates or blank dates);
- If User ID does not exist, no record will be created with the specified start date, end date, and Overall Status.
- If you will be using the "trainingHistoryCSV", only the "Classroom" type is supported; therefore, the LOTYPE column can be removed from the CSV when trying to create a course that doesn't exist.
- In case the CSV contains the LOTYPE column and the trainingHistoryCSV is used, only the Classroom type will be imported.

- If both Deadline Days and Deadline Date are provided, Deadline Date will prevail. • If there is not any value set, the default value will be applied, i.e. None.
- If the Administrators would like to clear the value, set *NONE* to the corresponding column.
- Validation of the Transfer Session Code and Parent Program ID columns may result in the following errors:

Error	Corrective Action
Learner not enrolled on Program {Parent Program ID}	Check value entered for Parent Program ID. If correct, enroll Learner onto the specified Program
Learner's {Parent Program ID} program transcript already contains a record for Module {Learning ID}	Check value entered for Learning ID. If correct, no corrective action necessary.
Module {Learning ID} is not associated with Program {Parent Program ID}	Check value entered for Parent Program ID. If correct, either transfer the Learner to a Program Session that involves module specified by Learning ID or add the module to the Program Session that the Learner is currently enrolled on.
Session {Transfer Session Code} not found for Module {Learning ID}	Check value entered for Transfer Session Code.

Language Column in Training History CSV Loader

The purpose of the Language column is to accommodate the association of a language to a transcript record. It could have implications on various loader-triggered actions like creating a new learning object, creating a new session, adding a transcript or updating on an existing transcript without changing too much of its existing behaviors. Also the multi-language handling behavior of the loader should be consistent with the workflow on the UI.

- **Creating a new course** - It involves creating a new session in the primary language. If a language is specified then it would perform the standard checking to see if the person doing the upload can create a primary bundle using that specified language otherwise the loader would raise an error on that transcript record. If the language is not specified then it would assume the default behavior to assign the language to the new session same as on the UI.
- **Creating a new session on an existing course** - It would be applicable for multi-session learning types. The new session should be assigned with one of the existing languages configured on the course. This needs to be checked when a language is specified for the record. If the language is not specified then use the primary language to be assigned to the new session.

- **Inserting a transcript on an existing session** - For learning types with online content, if a language is specified, check to see if the bundle exists already, this loader doesn't allow creating a new bundle on-the-fly. If a language is not specified then try to use the system default Auto-Select mechanism to assign the transcript with a language. For multi-session learning, use the existing behavior to identify the correct session to add the transcript to and ignore the language if it's specified as the enrollment should use the session-assigned language for the transcript.
- **Updating on an existing transcript** - Use existing means to identify the correct transcript to update and language is ignored if specified.

Transcript Status Change via Training History Data Loader

Similar to Catalog Editor, any status update of the latest transcript via Training History Data Loader may also affect the award of certification or competency.

However, some restrictions are applied to Training History Data Loader. In general, an update action may update multiple matching existing records, except the case when changing the status to "Completed". In such an exceptional case, as only the latest transcript can be changed, an exception will be thrown. This means that no backdating support is available when there are multiple transcript records found.

Insert a new transcript record, latest or historical, using loader

In the LMS with CFR license, when using Training Records CSV Loader to insert a new transcript record in Completed status, the award of job profile or competency will be based on the definition of the job profile or competency as of the completion date. The award of certifications is typically based on the course details as at the completion date, but you can override this date in the USE SETTINGS AS OF DATE field.

Improve Dates/Status Handling in Training Records Loader

In general there will be enrollment checks when a training record is uploaded. If the optional Enrollment Date field is not specified, the start date will be taken. And if start date is not specified or it is a future time, today will be taken as the Enrollment Date.

Basic validation is applied. Also this value cannot be after start date or in the future. When uploading a COMPLETED program record. There will be further enrollment checks.

- Online equivalent Program Modules will take the same start/end dates as the program record
- Classroom equivalent Program Modules will take the scheduled start/end dates
- Mandatory Program Modules will take status of COMPLETED

Course_CSV_Loader

Loader Specific Settings

- "Send Notifications to Instructors who have been assigned/deassigned to sessions" - Once checked, Instructors will be notified of the changes in assignments. The email templates used for these notifications are configured by the settings: System Configuration > Catalog > "Instructor Assigned to Class E-mail Template" and "Instructor Deassigned from Class E-mail Template".
- "One or more sessions have been set to active and New Sessions Available Notifications may be sent to learners who have indicated interest depending on enrollment policy settings." - This setting concerns the "New Sessions Available Notifications" and has the following options:
 - Send each learner a notification per session
 - Send each learner a single notification per module
 - Do not send notifications

Supported Fields

Adding New Courses:

- When adding courses, the mandatory fields are: Action, ModuleID, ModuleLearningType

Updating Existing Courses:

- Through the CSV loader, it is possible to update data at the course level, session level or class level.
- To update a specific class, the module ID, the session code, and the class, start and end dates must be specified. To update a specific session, only the module ID and the session code need to be specified. To update a course, only the module ID is required.

Deleting existing courses:

- Through the CSV loader, it is possible to delete an entire course, a specific session of a course or a specific class of a session.
- To delete a specific class, the module ID, the session code, and the class, start and end dates must be specified. To delete a specific session, only the module ID and the session code need to be specified. To delete a course, only the module ID is required.

Field	Content	Data Handling	Default
Action	Control Action (Either Add, Delete or Update)	Must be "A", "D", "U", or "AU" (Add, Delete, Update, Add or Update as appropriate)	None

ModuleID	Module ID	A Unique ID That Conforms to PeopleFluent LMS ID constraints (maximum 85 characters)	None
ModuleLearningType	Learning Type	<p>Must be one of:</p> <ul style="list-style-type: none"> A - Audio Cassette B - Book D - CD ROM R - Classroom 4 - Coaching M - Exam X - External Certification Q - Just-In-Time Learning O - Online J - On-the-Job Training - Self-Training (Paper) - Self-Training (Video) - Special Interest Group T - Task <li style="padding-left: 20px;">I - Video <li style="padding-left: 20px;">V - Virtual Classroom <li style="padding-left: 20px;">U - Virtual Classroom (Archived) <li style="padding-left: 20px;">W - Workshop/ Seminar <p>(maximum 1 characters)</p>	None
ModuleTitle	Course Title	Any Text (Max field length:255)	no title
ModuleDescription	Course Description	Any Text (Max field length: None)	None
ModuleMoreInfoHyperlink	More Information Hyperlink	Any Text (Max field length:500)	None
ModuleDurationComments	Duration Comments	Any Text (Max field length:100)	None

ModuleSubject	Subject	Name of a Predefined Course Subject Any Text (Max field length:50)	None
ModuleCategory	Category	Name of a Predefined Course Category Any Text (Max field length:50)	None
ModuleImage	Image for Catalog Display	A valid URL for an image, e.g., http://www.abc.com/abc.png or /ekp/nd/fresco/repository/EKPO002343.jpg Any Text (Max field length:100)	None
ModuleShowInCatalog	Show in catalog	"Y" or "N"	N
ModuleArchive	Archive	"Y" or "N"	N
ModuleArchiveDate	Auto-Archive Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.	None
ModulePeerComments	Allow peer review/comments	"Y" or "N"	Y
ModuleChargeType	Module Charge Procedure	Must be one of: NONE - No charge. PER REG - Charged per Registration ONLINE - Online Payment	No charge.
ModuleCost	Course Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
ModuleCurrency	Module Charge Currency	A three-letter currency code, e.g., GBP or USD	None
ModulePriceInfo	Currency Cost Price Info	Any Text (Max field length:300)	None
ModuleCostCenter	Charged Cost Center	Any Text (Max field length:45)	None

ModuleTokenCost	Token Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
ModuleTokenPriceInfo	Token Cost Price Info	Any Text (Max field length:300)	None
ModuleLanguage	Language	Name of a Predefined Course Language or ISO 2-char codes, e.g., en, fr_CA, es_ES Any Text (Max field length:50)	English
ModuleVendor	Vendor	Name of a Predefined Course Vendor Any Text (Max field length:255)	None
ModuleCertification	Certification Name	Name of a Predefined Certification Any Text (Max field length:1,000)	None
ModuleExams	Exams	List of predefined exam IDs, delimited by vertical bars, e.g., EXAM1 EXAM2 EXAM3	None
ModuleExamsMandatory	Exams are mandatory.	"Y" or "N"	N
ModuleEvaluation	Evaluation	Exam ID of Predefined Evaluation	None
SupervisorAssessment	Supervisor Assessment	Exam ID of Predefined Supervisor Assessment	None
ModuleCatalogs	Assign course to catalogs	A list of catalog names, each of which may be hierarchical, separated by a vertical bar, e.g., A/B/C1 A/B/C2	None
ModuleAudience	Audience	List of descriptions delimited by vertical bars (" "). Each description has a maximum length of 255.	None
ModuleObjectives	Objectives	List of descriptions delimited by vertical bars (" "). Each description has a maximum length of 2,000.	None

ModuleAllowStatusChange	Allow status changes to be made at any time (e.g., ignore standard business rules)	"Y" or "N"	N
ModuleAllowReEnroll	Allow re-enrollment	"Y" or "N"	Y
ModuleEnrollmentPolicy	Enrollment Policy	Name of a Predefined Enrollment Policy Any Text (Max field length:50)	None
ModuleOrgPolicyFirst	Org policy overrides course policy.	"Y" or "N"	N
ModuleKcEnable	Enable the Knowledge Center for this module	"Y" or "N"	Y
ModuleKcShowPictureArea	(KC) AREA: Show picture area	"Y", "N" or "I" ("I", Knowledge Center show picture area configuration inherits from catalog setting)	Y
ModuleKcPicture	KC Picture URL	A valid URL for an image, e.g., http://www.abc.com/abc.png or /ekp/nd/fresco/repository/EKP0002343.jpg Any Text (Max field length:255)	None
ModuleKcCourseLink	Course link always launches the KC instead of the course.	"Y" or "N"	N
ModuleKcAssessmentWorkflow	(KC) AREA: Show assessment workflow area	"Y" or "N"	Y
ModuleKcCertification	(KC) AREA: Show certification area	"Y" or "N"	Y
ModuleKcContactList	(KC) AREA: Show contact list area	"Y" or "N"	Y
ModuleKcForum	(KC) AREA: Show forum area	"Y" or "N"	Y
ModuleKcInstructorList	(KC) AREA: Show instructor list area	"Y" or "N"	Y
ModuleKcNews	(KC) AREA: Show news area	"Y" or "N"	Y
ModuleKcNotepad	(KC) AREA: Show notepad area	"Y" or "N"	Y

ModuleKcPeerComments	(KC) AREA: Show peer comments area	"Y" or "N"	Y
ModuleKcReferences	(KC) AREA: Show references area	"Y" or "N"	Y
ModuleKcStatusChange	(KC) AREA: Show status change area	"Y" or "N"	Y
ModuleKcExam	(KC) AREA: Show exam area	"Y" or "N"	Y
ModuleKcInstructorAboutMe	(KC) AREA: Show About Me for the instructor	"Y" or "N"	Y
ModuleKcInstructorReferences	(KC) AREA: Show reference share area for instructors	"Y" or "N"	Y
ModuleKcFileShare	(KC) AREA: Show file share area	"Y" or "N"	N
ModuleKcHomeworkDropBox	(KC) AREA: Show homework drop box	"Y" or "N"	N
ModuleKcMarkedHomework	(KC) AREA: Show marked/reviewed homework	"Y" or "N"	N
ModuleKcTranscript	(KC) AREA: Show transcript area	"Y" or "N"	Y
ModuleKcQuickEvaluation	(KC) AREA: Show quick evaluation area	"Y" or "N"	N
ModuleKcShowModule Attributes	(KC) AREA: Show Module Attributes	"Y" or "N"	Y
CreateWikiSpace	Create Wiki Space	"Y" or "N"	N
WikiSpaceName	Wiki Space Name	Any Text (Max field length: None)	Course Title
ModuleEvalMandatory	Mandatory Evaluation	"Y" or "N"	N
TemplateID	Template	Name of a Predefined Template (Updates only)	None

PermReplace	Permissions Action	<p>"Y" - to completely replace permission settings on this course using permissions from the "master template".</p> <p>"N" - to add to existing permission settings on this course using permissions from the "master template".</p>	N
PermTemplateID	Permissions Template	Learning object ID whose permissions are used as a "master template" for this course	None
ModuleRequireESignatures	Require eSignatures	"Y" or "N"	N
ModuleAllowReopen	To prevent a participant from reopening this module once it has been completed, use the setting below.	"Y" or "N"	Y
ModuleAllowPublicAccess	This module/program currently allows public access.	"Y" or "N"	Y
ModuleSupportContact	Course Support Contact	Any Text (Max field length:255)	None
Prereq_Lid	Prerequisites	List of module IDs delimited by vertical bars (" "). The maximum length of the list is 255.	None
Prereq_Check_Type	Prerequisite Check Type	NO_PREVIOUS, ENROLLED, CMI_COMPLETE, or COMPLETE. Only effective when used with PREREQ_LID list.	ENROLLED
Prereq_Logic	Prerequisite Check Type	AND, OR. Only effective when used with PREREQ_LID list.	AND
Prereq_Lid_Sec	Prerequisites	List of module IDs delimited by vertical bars (" "). The maximum length of the list is 255.	

Prereq_Check_Type_Sec	Prerequisite Check Type	NO_PREVIOUS, ENROLLED, CMI_COMPLETE, or COMPLETE. Only effective when used with PREREQ_LID list.	ENROLLED
Prereq_Logic_Sec	Prerequisite Check Type	AND, OR. Only effective when used with PREREQ_LID list.	AND
ModuleAllowSelfEnrollment	Allow self-enrollment	"Y" or "N" Applicable only for the following types: R - Classroom M - Exam O - Online T - Task V - Virtual Classroom U - Virtual Classroom (Archived) W - Workshop/Seminar	Y
ModuleAllowSessionTransfer	Allow session transfer	"Y" or "N"	N
SessionID	Session Code	Any Text (Max field length:85)	None
SessionTitle	Session Title	Any Text (Max field length:255)	None
SessionDescription	Session Description	Any Text (Max field length: None)	None

SessionStatus	Session Status	<p>Must be one of:</p> <p>active - Active</p> <p>pending - Pending</p> <p>completed - Completed</p> <p>closed - Closed</p> <p>cancelled - Cancelled</p> <p>invitation - Invitation Only</p> <p>prompt - Prompt user to select session.</p> <p>retired - Retired</p> <p>ended - Ended</p>	Observe System Configuration setting
SessionLanguage	Delivery Language	<p>Name of a Predefined Course Language or ISO 2-char codes, e.g., en, fr_CA, es_ES or *AUTO*</p> <p>Any Text (Max field length:50)</p>	Auto-Select
SessionDeadlineDays	Completion Deadline (Days)	Days from Enrollment (0 implies unlimited)	None
SessionDeadlineDate	Completion Deadline (Date)	<p>Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.</p>	None
SessionDeadlineHandling	Completion Deadline Handling	<p>N - Do nothing, the deadline was just for reference</p> <p>Y - Set transcript to DEADLINE EXPIRED and block learner from launching the course</p> <p>B - Block learner from launching other courses until they complete this course</p>	N

SessionSeatLimitRule	Session Seat Limit Rule	Empty or one of: FIXED - Based on min/ max enrollment limits DYNAMIC - Based on facility size/capacity	Depends on learning type
SessionMaxUsers	Session Enrollment Limit Maximum	Any Positive Whole Number	None
SessionMinUsers	Session Enrollment Limit Minimum	Any Positive Whole Number	None
SessionCountPendingInTotal	Count "Pending Approval" records in total current enrollments	"Y" or "N"	N
SessionWithdrawDaysLimit	Cannot withdraw within N days of start date	Any Positive Whole Number	None
SessionChargeType	Session Charge Procedure	Must be one of: NONE - No charge. PER REG - Charged per Registration MODULE - Use Module Configured Settings ONLINE - Online Payment	Use Module Configured Settings
SessionCost	Session Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
SessionCurrency	Session Charge Currency	A three-letter currency code, e.g., GBP or USD	None
SessionPriceInfo	Session Level Currency Cost Price Info	Any Text (Max field length:300)	None
SessionCostCenter	Charged Cost Center	Any Text (Max field length:45)	None
SessionTokenCost	Session Level Token Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
SessionTokenPriceInfo	Session Level Token Cost Price Info	Any Text (Max field length:300)	None

SessionWaitListHandling	Session Level Waitlist Handling	<p>Must be one of:</p> <p>AUTO - Automatic Upgrade</p> <p>MANUAL - Manual (Administrator) Upgrade</p> <p>ALL - Waitlist all learners.</p> <p>NONE - No waitlist</p>	AUTO
SessionEnrolmentStart	Session Level Enrollment Start Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.	None
SessionEnrolmentEnd	Session Level Enrollment End Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.	None
SessionTrainingHours	Credits	A decimal value with up to two decimal places, e.g., 12.50 or 5.25	0
SessionCustomText	Session Level Custom Text	Any Text (Max field length:255)	None
SessionTimeZone	Session Level Time Zone	Time zone ID	System Time Zone
SessionInstructors	Session Instructor List	List of user IDs belonging to instructors to be assigned to the session, separated by vertical bar, e.g. instr1^assignmentId1 instr2^assignmentId2 instr3^assignmentId3	None
SessionApprovers	Session Approver List	Up to two user IDs belonging to approvers to be assigned to the session, separated by vertical bar (e.g., appr1^assignmentId1 appr2^assignmentId2)	None
SessionGeographicRegion	Session Geographic Region	Name of a Predefined Geographic Region	None

SessionAssessmentWorkflowTemplate	Session Assessment Workflow Template Name	Name of a Predefined Assessment Workflow Template	None
SessionDisableWorkflowAssignment	Disable workflow assignment for the session	"Y" or "N"	N
ShowSessionSelectionReminder	Session level "Show session selection reminder"	"Y" or "N"	Y
SessionAllowPromptSessionSelfEnrollment	Session Level "Make Prompt user to select session available for self-enrollment"	"Y" or "N"	N
SessionDroppedWaitlistTargetSession	Session Level target session for "Transfer users dropped from waitlist to the following session"	Session Code (*NONE* to clear)	None
ClassStart	Class Start Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.	None
NewClassStart	New Class Start Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.	None
ClassEnd	Class End Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.	None
ClassFacilityCode	Class Level Facility Code	Code of Predefined Facility Any Text (Max field length:85)	None
ClassVenue	Class Level Venue	Any Text (Max field length:255)	None
ClassRoomName	Class Level Room Name	Any Text (Max field length:255)	None
ClassInstructors	Class Instructor List	List of user IDs belonging to instructors to be assigned to the class, separated by vertical bars, e.g., instr1^assignmentId1 instr2^assignmentId2 instr3^assignmentId3	None

Launch.Href	Launch HREF	URL for content launch	None
Launch.Interface	Launch Interface	Type of launch handler: 0 - Generic Web Launch 3 - Structured Content 5 - Resource 7 - Timed HTML 14 - Rustici Engine 15 - LTI	None
Launch.RuntimeEnvironment	Runtime Environment	Type of runtime environment for Launch Interface 5 - Resource: g - Generic/none s - JavaScript API a - AICC/HACP x - xAPI (also known as 'Tin Can API') t - Exam	None
Launch.ExamId	Launch Exam Id	Launchable exam identifier	None
Online.Win_Height	Online Window Height	Height (pixels) of window	None
Online.Win_Width	Online Window Width	Width (pixels) of window	None
Online.Grading_Method	Online Grading Method	Grading Method (online only) H - Highest A - Average F - First L - Last	None
Online.Completion_Method	Online Completion Method	Completion Method (online only) A - Auto M - Manual	None
Online.Mastery_Score	Online Mastery Score	Mastery Score (online only)	None
MA-RESUX1	Module Attribute: Residential (UX1)	"Y" or "N"	N

MA-commonID	Module Attribute: ID	ISO - ISO TEST1 - TST1	None
MA-RESUX2	Module Attribute: Residential	"Y" or "N"	N
MA-Module Attribute Free text	Module Attribute: Additional Comments	Any Text (Max field length:2,000)	None
MA-Module Attribute Numeric	Module Attribute: Points	Number	None
MA-cpds	Module Attribute: CPD-Structured-Hrs	Number	None
MA-cpdu	Module Attribute: CPD-Unstructured-Hrs	Any Text (Max field length:2,000)	None
MA-attribute93	Module Attribute: 9.3 Attribute	Any Text (Max field length:2,000)	None
MA-JEA_EdCredit	Module Attribute: JEA Ed Credit	Number	None
MA-MA-Prijs per eenheid (2015)	Module Attribute: MA-Prijs per eenheid (2015)	Any Text (Max field length:2,000)	None
MA-MA-Prijs per eenheid (2016)	Module Attribute: MA-Prijs per eenheid (2016)	Any Text (Max field length:2,000)	None
MA-MA-PPE15	Module Attribute: MA-PPE15	Any Text (Max field length:2,000)	None
MA-MA-PPE16	Module Attribute: MA-PPE16	Any Text (Max field length:2,000)	None
MA-owner	Module Attribute: Module Owner	JK - JK	None
SA-SessionAttributeCode Checkbox2	Session Attribute: SACC	"Y" or "N"	N
SA-SessionAttributeCodeFreeText	Session Attribute: SessionAttributeCodeFreeText	Any Text (Max field length:2,000)	None
SA-SessionAttributeCodeTextArea	Session Attribute: SACTA	Any Text (Max field length:2,000)	None
SA-SessionAttributeCodeDropdown	Session Attribute: SACDD		None
SA-SessionAttributeCodeNumeric	Session Attribute: SessionAttributeCodeNumeric	Number	None
SA-R	Session Attribute: Residential	"Y" or "N"	

Once a user that has no permission to remove a course uses the CSV file, the system will not permit the deletion and included an error report or failure notification in the log file.

Check Access on Course-Related CSV Uploads

For enhanced data security considerations, when a user attempts to import data using the Program CSV or Course CSV format via the user interface, scheduled task or API, the LMS checks if the importer has write access of the learning objects concerned.

For the following fields used in a data import, the LMS checks if the importer has at least read access to the object before the object can be assigned to the course in question

- ModuleCategory
- ModuleCertification
- ModuleExams
- ModuleEvaluation
- SupervisorAssessment
- ModuleCatalogs
- ModuleEnrollmentPolicy
- SessionInstructors
- SessionApprovers
- SessionGeographicRegion
- SessionAssessmentWorkflowTemplate
- ClassFacilityCode

When a user attempts to import data through Catalog Assignment CSV Loader via the user interface, scheduled task or API, the LMS checks if the user has the read/write access to the catalog structure concerned.

'Use Defined Catalog Image' Option Considerations

The Course CSV and the Program CSV loaders support the Catalog image inheritance option from the course for the Knowledge Center. The value is a valid URL for an image, e.g. <http://www.abc.com/abc.png> or ekp/nd/fresco/repository/EKP0002343.jpg.

Online Module Properties

- Launch.Href
- Launch.Interface

- Launch.ExamId
- Online.Win_Height
- Online.Win_Width
- Online.Grading_Method
- Online.Completion_Method
- Online.Mastery_Score

These attributes are intended for some very specific use cases and are NOT for general loading of complex SCORM/AICC course materials (use the provided content loaders for this case), and because of this some constraints have been placed on the supported scenarios to avoid accidental mismanagement of more sophisticated launch interfaces. The specific scenarios where these attributes can help are:

Use Case #1: Creating or updating online courses that use a PDF, URL, or video/player as the primary content.

Creating courses from internal materials (e.g. videos and PDF) is a common need for organizations with numerous ISO materials or transitioning from older systems. Now, the Course CSV loader may be used to bulk create and manage a large number of such courses. The "Launch..." parameters in particular can be used to create or modify the launch page, although this is restricted to a limited set of interface types: "Generic Web Launch", "Resource", or "Timed HTML" only. These are typically the interfaces used for this type of course.

Example values for a Generic Launch Interface that references an item in the LMS Repository:

Launch.Interface	Launch.Href
0	/ekp102/nd/fresco/repository/EKP000004401.pdf

Use Case #2: Modifying general parameters for online (or equivalent) course types.

The "Online..." properties may be set for any online equivalent course type at either course creation or course update time. If it is not an "online equivalent" course type it is ignored.

Use Case #3: Creating or updating online courses to use an LMS exam as the content.

Here, the "Launch.Interface" set to "Resource" and the "Launch.ExamId" set to "<whatever exam ID>" is all that is needed. Other internal properties are set accordingly when the system detects that a "Launch.ExamId" is provided.

Example setup of a specific LMS exam as a launch URL:

Launch.Interface	Launch.ExamId
5	EXAM_001

A learning object of type 5 (Resource) can have either an external URL or an Exam ID as its launch URL, but it cannot have both.

Validation Errors

	Error	Corrective Action
1	Access Denied, cannot delete Learning Object with ID:	Login as Uploader with Role that has "Allow Course Deletes" enabled.

Certification Awarding CSV Loader

A user is able to bulk award certifications via the Awarded Certificates CSV Loader in Management Center. In order to perform this bulk awarding action, the user needs to have Unrestricted role access to Awarded Certificates CSV Loader. Read only means the user can see the CSV import history only, unable to perform bulk awarding.

Use the following guide in creating certificate data file (CSV).



As the LMS is not configured to automatically change the file type after import, you have to manually rename your .csv file into .imported. This is make sure that the certificate records will not be imported multiple number of times.

Guidelines for using the Awarded Certificates CSV Loader

Ensure that the data contained in the CSV conforms to the formatting required by the template as specified in the table below. Do not insert commas as these will cause subsequent data to be treated as a separate column.

Enforce record duplication checking if configured.

Field	Content	Data Handling	Default
ACTION	Action	"A" for Add or "D" for Delete	A
USERID	User ID	Mandatory	None
CERTIFICATION_TITLE	Certification Name	Either a certification code or a certification name must be provided. If a certification code is not provided, the row will be skipped if more than one certificate matches the given certification name.	None
CERTIFICATION_CODE	Certification Code	A unique value among certificates. Either a certification code or a certification name must be provided	None
AWARD_ID	Award ID	The Award ID of the certificate award (ignored for add / mandatory for delete)	Automatically generated when adding records
DATE_ACHIEVED	Achievement date	Mandatory. If not specified, the record will be skipped. Preferred Date Format: dd-MMM-yyyy (as specified in System Configuration)	None

EXPIRE_DATE	Expire date	Optional. If not specified, it will be computed based on the certification validity period and the achievement date. Preferred Date Format: dd-MMM-yyyy (as specified in System Configuration)	Certification Validity Period
COMMENTS	Comments	Optional. Maximum 255 bytes. If more than that, record skipped and error reported.	None
IS_SELF_AWARDED	Is Self Award	Mandatory. Must be "Y" or "N". Y - Yes N - No	N
STATUS	Status	Conditional. When Is Self Award = "Y", Status is required. Must be "0", "1", "2", "3" or "4". - Open for Editing - Pending Approval - Approved - Approval Denied - Cancelled	None
ATTACHMENT_URL	Attachment Url	Optional. A valid URL for the attachment. Maximum 255 bytes. If more than that, record skipped and error reported. Maximum attachment size 5 megabytes e.g. http://www.abc.com/tec101.pdf or /nd/fresco/repository/tec.pdf	None
CT-{DropDownAttributeCode}	Value for Certificate Award Drop Down Attribute with specified Attribute Code	Code related to the Drop Down value to set for the attribute (*NONE* to clear)	None

CT- <code>{DateAttributeCode}</code>	Value for Certificate Award Date Attribute with specified Attribute Code	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m. (*NONE* to clear)	None
CT- <code>{AttributeCode}</code>	Value for Certificate Award Attribute with specified Attribute Code (not of Drop Down or Date Type)	Any Text (Max field length:2,000) (*NONE* to clear)	None

Equivalency Rule CSV Loader

To use the data loader, you must have a role which has "Manage Equivalent Rules" and "Equivalency Data Loader" enabled with the role access.

The following fields are supported by this loader:

Field	Content	Data Handling
Action	Control Action (Either Add or Delete)	Must be "A" or "D" (Add or Delete).
Target Learning Module	Module ID	A Unique ID That Conforms to PeopleFluent LMS ID constraints (maximum 85 characters).
Substitute Learning	Module ID(s)	A list of separate Unique IDs That Conform to PeopleFluent LMS ID constraints (maximum 85 characters) with as the separator for defining multiple substitutes.
Read Permissions Template	Read Permissions Template Code	Permissions Template Code to set read permission for the Equivalency Rule (maximum 85 characters).
Write Permissions Template	Write Permissions Template Code	Permissions Template Code to set write permission for the Equivalency Rule (maximum 85 characters).
Target Audience Template	Target Audience Permission Template Code	Permissions Template Code to set Target Audience for the Equivalency Rule (maximum 85 characters), set this field will override "Apply Target Audience to All Organizations" setting during the import.
AssignReadTemplate	User Targeting Template Action	"L" - to link to the user targeting template as the permission targeting criteria. "C" - to completely copy and replace permission settings on this object using the current configured settings from the user targeting template.
AssignWriteTemplate	User Targeting Template Action	"L" - to link to the user targeting template as the permission targeting criteria. "C" - to completely copy and replace permission settings on this object using the current configured settings from the user targeting template.

AssignTargetAudienceTemplate	User Targeting Template Action	<p>"L" - to link to the user targeting template as the permission targeting criteria.</p> <p>"C" - to completely copy and replace permission settings on this object using the current configured settings from the user targeting template.</p>
------------------------------	--------------------------------------	--

Validation will be performed on each row of uploaded file. Validation rule is consistent with Equivalency Rule user interface.

For rule deletion, when more than one rule of exact target and substitute are found, Talent Suite will delete matched rules which the uploader has the required permission. If deletion of all matched rules cannot be done, Talent Suite will report the number of matched rules found and number of rules deleted.

If the "Highest Organization Level Visible" of an uploader is "Root", a checkbox "Apply Target Audience to All Organizations" will be shown in loader. If the checkbox is checked during upload process, all the new rules created will have root organization as target audience.

A report "R264 - Course Equivalency Rule Export in CSV Data Uploader Format" is available under Learning Reports in Report Manager.

- It generates course equivalency rule data dump of the same column format as CSV data loader. The value of "Action" column defaults to "D".
- It reports on equivalency rules for selected target. The module selector is available to select multiple targets.
- It lists rules which the report requester has at least read permission.

Competency Data Loader

Loader Specific Settings

- **"Create any new catalogs found in the CSV file "**: If the option is checked, the loader would create new catalogs/sub-catalogs where applicable.

Supported Fields

The Data Loader supports the actions of creating/updating/deleting of competencies, as well as assigning/updating/de-assigning learning modules to/from existing competencies. Action to assign a piece of learning module to an existing competency can be defined within the same row instead of the old format to separate the two. The upload user should have the write permission on the relevant competency model in order to perform any operation on the competency.

CSV Header	Mandatory Field	Default Value	Name in Competency Creator	Value
Action	Y	None		'A' for Add, 'U' for Update, 'D' for Delete
ReferenceCode	Y	None	Reference Code	A unique reference code (maximum 85 characters)
Title	Y (to add a new competency)	None	Title	Any text (maximum 85 characters)
Model	N	General	Model	Any text (maximum 50 characters)
Description	N	None	Description	Any text (*NONE* to clear) (maximum 6,000 characters)
Language	N	Multi-Language	Language	The assigned language with an ISO 2-char code, e.g.: en, fr, fr_CA, es_ES

Active	N	'N'	Active	'Y' for Yes (option checked) or 'N' for No (option unchecked)
ProficiencyLevelGroup	N	System Default Level Group	Level Group	An Existing Proficiency Level Group Name
Training	N	'N'	Training	'Y' for Yes (option checked) or 'N' for No (option unchecked)
TrainingAllLearningModules Completed	N	'Y'	This competency requires that ALL of the assigned learning modules be completed.	'Y' for Yes (option checked) or 'N' for No (option unchecked)
TrainingTargetLevel	N	None	The target level acquired is	An existing Proficiency Level Code
TrainingNumberOfCompleted LearningModules	N	None	of the listed learning modules (including mandatory)	Any number (Please note that the number must not be greater than the number of the assigned learning modules)
DeployAssessment	N	'N'	Deploy Assessment	'Y' for Yes (option checked) or 'N' for No (option unchecked)
AdHocSelfAssessment	N	'N'	Ad Hoc Self-Assessment	'Y' for Yes (option checked) or 'N' for No (option unchecked)
AdHocReviewerAssessment	N	'Y'	Ad Hoc Reviewer Assessment	'Y' for Yes (option checked) or 'N' for No (option unchecked)

AdHocAssessmentWaitingPeriod	N	0	Minimum x Day(s) of Waiting Period for Re-Ad-Hoc Assessment	Any number
AdHocAssessmentWaitingPeriodUnit	N	'D'	Minimum x Day(s) of Waiting Period for Re-Ad-Hoc Assessment	'D' for day(s) or 'Y' for year(s)
AdHocAssessmentValidFor	N	'N'	Ad hoc assessment valid for	'Y' for Yes (option checked) or 'N' for No (option unchecked)
AdHocAssessmentValidForNumber	N	0	Ad hoc assessment valid for	Any number
AdHocAssessmentValidForUnit	N	'D'	Ad hoc assessment valid for	'D' for day(s) or 'Y' for year(s)
LearningModuleID	Y (to assign/de-assign a learning module)	None	Learning ID	Must be a cataloged learning module ID. (maximum 85 characters)
LearningModuleMandatory	N	'Y'	Mandatory (for Training)	'Y' for Yes (option checked) or 'N' for No (option unchecked)
LearningModuleRevision	N	'Any'	Revision	'Any' or 'Effective' (maximum 10 characters)
LearningModuleValidFor	N	None	Valid for	Any number (*NONE* to clear) (maximum 85 characters)
LearningModuleValidForUnit	N	'D'	Valid for	'D' for day(s) or 'Y' for year(s)
LearningModuleTargetLevel	N	None	Target Level	An existing Proficiency Level Code

GracePeriod	N	'N'	After a new revision of a mandatory learning module requiring the effective revision to be published, allow a grace period of x Day(s) before revoking the competency	'Y' for Yes (option checked) or 'N' for No (option unchecked)
GracePeriodNumber	N	0	After a new revision of a mandatory learning module requiring the effective revision to be published, allow a grace period of x Day(s) before revoking the competency	Any number
GracePeriodUnit	N	'D'	After a new revision of a mandatory learning module requiring the effective revision to be published, allow a grace period of x Day(s) before revoking the competency	'D' for day(s) or 'Y' for year(s)
RenewalPeriod	N	'N'	For mandatory modules, apply a renewal period and automatically re-enroll learners x Day(s) prior to module expiration	'Y' for Yes (option checked) or 'N' for No (option unchecked)
RenewalPeriodNumber	N	0	For mandatory modules, apply a renewal period and automatically re-enroll learners x Day(s) prior to module expiration	Any number

RenewalPeriodUnit	N	'D'	For mandatory modules, apply a renewal period and automatically re-enroll learners x Day(s) prior to module expiration	'D' for day(s)' or 'Y' for year(s)
ApplyValidityPeriodFrom	N	1	During the renewal period, on completion of the learning module apply the validity period from	'1' or '2' 1 = The date of completion of the learning module 2 = The previous module expiration date
ReminderDaysBefore Expiration	N	None	Send reminder x day(s) before learning module expires.	Any number (*NONE* to clear)
SendNotification	N	'N'	Send notification when this competency has entered the grace period or has been revoked.	'Y' for Yes (option checked) or 'N' for No (option unchecked)



For clients who have been using the old data loader format, it's recommended to convert the competency data output into this new format for bulk processing. For backward compatibility, it's possible to continue to use the old format by enabling a new back-end property "COMPETENCY.DATALOADEROLDFORMAT" defined in the `ekp.properties` file:

```
competency.dataLoaderOldFormat=true
```

For on-premise installation, a scheduled server restart is required to turn this switch on, the server administrator would need to make the above change in the properties file; for hosted solution, this change can be requested via the standard Support channel. If this switch is turned on, accessing the Data Loader via the Manage Center would support the old CSV format.

Data Dump Report

"R420 – Competency Export in CSV Data Uploader Format" is available under System Reports in the Report Manager. It outputs existing competency definitions in the same format as the data loader.

The report would export existing learning module assignment records as separate records. If there are 3 learning modules assigned, 3 records are exported, the properties of the same competency are repeated. If there is no learning module assigned, only 1 record with the existing competency properties is exported.

Competency Expiry Data Loader

Field	Content	Mandatory	Data Handling	Default
UserID	User ID	Yes	User ID of a User in the System	None
CompetencyCode	Competency Code	Yes	Reference Code of User's Competency against which new expiry date should be set	None
LearningID	Learning ID	If User has more than one module expiry date against the specified Competency, ignored otherwise	Learning ID of Module in specified Competency against which new expiry date should be set	None
Expiry	Expiry	Yes	One of "R(30D)", "R(5Y)", or "F(2018-01-01 00:00:00)" where "30" can be replaced by the number of days (max 9999) after module completion/ad-hoc assessment for expiry, "5" can be replaced by the number of years (max 100) after module completion/ad-hoc assessment for expiry, and "2018-01-01 00:00:00" can be replaced by a fixed date for expiry in the yyyy-MM-dd HH:mm:ss format	None

Validation

	Error	Corrective Action
1	Field cannot be blank	Check value has been specified for all required columns
2	Unrecognized Competency Code	Check Competency Code is correct and points to a competency in the system
3	Learning not in User Records	Check the Learning ID is correct and that the learner has completed record in his/her records
4	Unrecognized Learning ID	Check the Learning ID is correct and points to a learning object in the system
5	Cannot compute Expiry	Ensure the value for Expiry adheres to the data handling rules

Job Profile CSV Loader

The loader processes three types of entities:

- Job Profiles
- Competencies
- Job Profile Catalogs

While the Loader can add, update and delete Job Profiles, it can only add Job Profile Catalogs and assign, update competency assignment properties or de-assign Competencies from Job Profiles. A Job Profile Catalog will be created if the catalog of the provided name does not exist.

The loader can be activated via the Role Feature configuration under **Manage Features > Competency Manager Features > Job Profile Data Loader**.

Supported Fields

CSV Header	Mandatory Field	Default Value	Name in Job Profile Creator	Value
Action	Y	None		A/U/D
JobProfileReferenceCode	Y	None	Reference Code	A unique reference code (maximum 85 characters)
JobProfileName	Y (to add a new job profile)	None	Name	Any text (maximum 85 characters)
JobProfileCatalog	N	"General"	Job Profile Catalog	Any text (maximum 50 characters)
JobProfileOwner	N	None	Job Profile Owner	User ID of the owner (*NONE* to clear) (maximum 255 characters)

JobProfileActive	N	'N'	Active	'Y' or 'N'
JobProfileDescription	N	None	Description	Any text (*NONE* to clear) (maximum 1,000 characters)
JobProfileSelfAssignment	N	'N'	Allows Self-Assignment	'Y' or 'N'
JobProfileManualAssignment	N	'Y'	Allows Reviewer Assignment	'Y' or 'N'
CompetencyReferenceCode	Y (to add/ remove a competency assignment)	None	Competency Name	Must be a cataloged competency code (maximum 85 characters)
CompetencyMandatory	N	'Y'	Mandatory Flag in Competency Assignment	'Y' or 'N'
CompetencyRequiredLevel	N	None	Required Competency Level	Any text (*NONE* to clear) (maximum 255 characters)
JobProfileNumberOfRequired	N	'ALL'	Required Number of Competencies	'ALL' or an integer, lower than, or equal to, the number of assigned competencies at this point
Language	N	*ALL* (Multi-Language)	Language	ISO 2-char codes, e.g., en_fr_CA, es_ES

<p>JobProfileAssignment NotificationForAssignee</p>	<p>N</p>	<p>*DEFAULT*</p>	<p>Job Profile Assignment Notification for Assignee E- mail</p>	<p>*DEFAULT* for "Send in system default template" option "Template Name" for a custom e-mail notification template *NOMAIL* for the "Do not send" option (maximum 100 characters)</p>
<p>JobProfileAssignment NotificationForDirectAppraiser</p>	<p>N</p>	<p>*DEFAULT*</p>	<p>Job Profile Assignment Notification for Direct Appraisers E-mail</p>	<p>*DEFAULT* for "Send in system default template" option "Template Name" for a custom e-mail notification template *NOMAIL* for the "Do not send" option (maximum 100 characters)</p>

<p>JobProfileAssignment NotificationForJobProfileOwner</p>	<p>N</p>	<p>*DEFAULT*</p>	<p>Job Profile Assignment Notification for Job Profile Owner E- mail</p>	<p>*DEFAULT* for "Send in system default template" option "Template Name" for a custom e-mail notification template *NOMAIL* for the "Do not send" option (maximum 100 characters)</p>
<p>JobProfileDeAssignment NotificationForAssignee</p>	<p>N</p>	<p>*DEFAULT*</p>	<p>Job Profile De- Assignment Notification for Direct Appraisers E-mail</p>	<p>*DEFAULT* for "Send in system default template" option "Template Name" for a custom e-mail notification template *NOMAIL* for the "Do not send" option (maximum 100 characters)</p>

JobProfileDeAssignment NotificationForDirectAppraiser	N	*DEFAULT*	Job Profile De-Assignment Notification for Assignee E- mail	*DEFAULT* for "Send in system default template" option "Template Name" for a custom e-mail notification template *NOMAIL* for the "Do not send" option (maximum 100 characters)
JobProfileDeAssignment NotificationForJobProfileOwner	N	*DEFAULT*	Job Profile De-Assignment Notification for Job Profile Owner E-mail	*DEFAULT* for "Send in system default template" option "Template Name" for a custom e-mail notification template *NOMAIL* for the "Do not send" option (maximum 100 characters)

Information can be exported from the System using R419 -- Job Profile Export in CSV Data Uploader Format.

Adding an Owner to the Job Profile Data Loader

If Multiple Assignments is **disabled**, users can enter a user ID (PID) in JobProfileOwner column to identify the owner of the job profile.

If Multiple Assignments is **enabled**, there is an extra column JobProfileOwnerAssignmentId in the CSV template, to specify the assignment ID (Assignment Ref Code) of the owner.

If the job profile owner specified only has one assignment:

- If JobProfileOwnerAssignmentId column is left blank, the system will only consider the JobProfileOwner column.
- If JobProfileOwnerAssignmentId is defined, the JobProfileOwnerAssignmentId needs to match the JobProfileOwner.

If the job profile owner specified **has more than one assignment**

- JobProfileOwnerAssignmentId needs to match the JobProfileOwner.

Validation

	Error	Reason
1	The required number of assigned competencies is invalid: there are <already assigned> assigned or mandatory competencies while <no of required> are required.	Logic error with the number of required competencies
2	<Field Name> cannot be blank	A mandatory field is blank
3	The desired competency is already assigned to this Job Profile	Attempt to assign a competency that is already assigned to a job profile
4	Impossible to assign an inactive competency.	Provided competency is inactive
5	The competency <Competency Reference Code> doesn't exist.	The provided competency code isn't in the database
6	The Job Profile already exists.	Attempt to add an already existing job profile (reference code check)
7	You do not have permission to create the catalog : <Catalog Name>	Attempt to use a catalog without write access
8	The catalog catatest is not accessible	Error while trying to create the specified catalog
9	You do not have access to the Proficiency Level named <level name>	Attempt to use a non-existing/forbidden proficiency level
10	The provided competency is not assigned to this Job Profile	Attempt to update a competency that isn't assigned to the job profile

Ad-Hoc Competency Assessment Data Loader

To access the loader, go to **Manage Center > TALENT > COMPETENCY MANAGER > Ad-hoc Competency Assessment Data Loader**.

Field	Content	Mandatory Field	Data Handling	Default	Reserve Words
Action	Action	Yes	"A" for Add, "D" for Delete, "U" for Update	None	
UserID	User ID	Yes	User ID of a User in the System	None	
CompetencyCode	Competency Code	Yes	Reference Code of the Awarded Competency	None	
ProficiencyLevelCode	Proficiency Level Code	For "A" and "U"	Code for the Competency Proficiency Level to be assigned	None	
AwardDate	Award Date	For "A" and "U"	Date in the yyyy-MM-dd HH:mm:ss format	None	*TODAY
AssignedBy	Assigned By	For "A" and "U"	User ID of a User in the System. If the User has more than one assignment, the assignment ID should be specified e.g. ndadmin^ndadmin-1	None	
AssessmentExpiryDate	Assessment ExpiryDate	No	Date in the yyyy-MM-dd HH:mm:ss format	*AS_CONFIG*	*AS_CO

The following will be validated for:

	Validation Message	Corrective Action
1	Unrecognized Action	Ensure the action is one of these: "A", "U", or "D".

2	Unrecognized User ID	Ensure a User with the specified User ID exists, and that it is visible to the Uploader.
3	Unrecognized Assignment ID	Ensure the specified User has an assignment with the specified Assignment ID, and that it is visible to the Uploader.
4	Unrecognized Competency Code	Ensure a Competency with the specified Code exists, and that it is visible to the Uploader.
5	Unrecognized Award Date	Ensure the date is specified in the yyyy-MM-dd HH:mm:ss format.
6	Unrecognized Assigner	Ensure a User with the specified User ID exists; the specified User has an assignment with the specified Assignment ID, and that it is visible to the Uploader.
7	Unrecognized Assessment Expiry Date	Ensure the date is specified in the yyyy-MM-dd HH:mm:ss format.
8	Competency already awarded	Use the "U" action to update if the competency has already been awarded.
9	Unrecognized Proficiency Level Code	Ensure the Code refers to a Level within the Proficiency Level Scale assigned to the specified Competency.

Reports R137 and R138 will export existing the Ad-hoc Competency Assessment Information in the required CSV Loader format.

Token Account CSV Loader

To access the loader, go to **Manage Center > LEARNING > PAYMENT MANAGER > Token Account Data Loader**. It can be used to perform two actions: initialize token accounts and add tokens to token accounts.

A token account must be created before tokens can be added. A token account name can be specified. If not, it will be generated based on the specified organization to which the account is assigned. Tokens added to a token account will be grouped by expiry date.

The data loader works like other data loader in the Talent Suite application and online help on CSV formatting is available on the main page, where a CSV file template is also available for download.

The 'UserId' in the CSV data format allows a user ID to be specified, from which the user organization will be derived. The organization to which the user belongs will be used in the data upload.

QTI Question Loader

Talent Suite offers partial support for the [IMS Question & Test Interoperability Specification v1.2.1](#), which defines an XML language for describing questions and tests. The system can import multiple choice questions and question pools from an IMS QTI document at Question QTI Loader at in the Manage area.



QTI Version

We do not support IMS QTI v2.x, which unfortunately is entirely incompatible with the 1.x versions. We made a conscious decision to support the earlier version as we believe it is the more widely supported of the two.

Creating User Data (XML Format)

Use the following data xml format in creating user data file:


```
<?xml version="1.0" encoding="UTF-8"?>

<DOCUMENT>

<USER ACTIONS="CREATE">

<USERID>steve</USERID>

<PERSONTITLE>MR</PERSONTITLE>

<GNAME>HOLMES</GNAME>

<FNAME>STEVE</FNAME>

<OTHERNAME>AppsManager</OTHERNAME>

<PERSONTITLE>MR</PERSONTITLE>

<JOINDATE>1999-04-01 00:00:00</JOINDATE>

<DAPPRAISER>ray</DAPPRAISER>

<LEVEL1>NetD</LEVEL1>

<LEVEL1DESC>NetDimensions</LEVEL1DESC>

<LEVEL2>Eng</LEVEL2>

<LEVEL2DESC>Engineering</LEVEL2DESC>

<LEVEL3>AppDev</LEVEL3>

<LEVEL3DESC>Application Development</LEVEL3DESC>

<EMPNO>2</EMPNO>

<JOBTITLE>APPLICATION DEVELOPMENT MANAGER</JOBTITLE>

<EMAIL>steve@netdimensions.com</EMAIL>

<EXTAUTHENTICATION>N</EXTAUTHENTICATION>

<EXTERNALMAIL>N</EXTERNALMAIL>

<COSTCENTER>Cost center 1</COSTCENTER>

<DEPARTMENTNAME>Engineering</DEPARTMENTNAME>
```

```
<CITY>Hong Kong</CITY>

<PROVINCESTATE>(None)</PROVINCESTATE>

<POSTALCODEZIP>(None)</POSTALCODEZIP>

<COUNTRY>HKG</COUNTRY>

<GENDER>MALE</GENDER>

</USER>

<USER ACTIONS="CREATE">

<USERID>ray</USERID>

<PERSONTITLE>MR</PERSONTITLE>

<GNAME>RUFF</GNAME>

<FNAME>RAY</FNAME>

<OTHERNAME>CTO</OTHERNAME>

<JOINDATE>1997-01-01 00:00:00</JOINDATE>

<DAPPRAISER />

<LEVEL1>NetD</LEVEL1>

<LEVEL1DESC>NetDimensions</LEVEL1DESC>

<EMPNO>1</EMPNO>

<JOBTITLE>CHIEF TECHNICAL OFFICER</JOBTITLE>

<EMAIL>ray@netdimensions.com</EMAIL>

<EXTAUTHENTICATION>N</EXTAUTHENTICATION>

<EXTERNALMAIL>N</EXTERNALMAIL>

<COSTCENTER>Cost center 2</COSTCENTER>

<DEPARTMENTNAME>Engineering</DEPARTMENTNAME>

<CITY>Hong Kong</CITY>

<PROVINCESTATE>(None)</PROVINCESTATE>
```

```
<POSTALCODEZIP>(None)</POSTALCODEZIP>  
  
<COUNTRY>HKG</COUNTRY>  
  
<GENDER>MALE</GENDER>  
  
<SUPERVISES>Engineering</SUPERVISES>  
  
</USER>  
  
</DOCUMENT>
```

When importing user using XML please be reminded to add this settings in `ekp.properties`:

```
default.newOrgNotExistRtnErr=N
```

Creating Course Data (XML Format)

The table below describes each field of the Courses XML Loader.

Field Name	Required?	Occurrence	Data Type	Description	Comments
courses	NA	Once	NA	This is the root element of the Xml.	Only one courses field is allowed in the Xml file.
course	NA	Multiple	NA	This element contains all information of a course.	Can have multiple <course> defined inside<courses>
id	yes	Once	Any Text	This is the unique id that identifies the course.	This id is unique within the LMS.
title	no	Once	Any Text	This is the title of the course that will be seen in course screen in the LMS.	
learningType	no	Once	Text	This is the learning type of the course. Valid values: classroom, online, audio_cassette, book, exam, ext_certification, ext_course, jit_learning, video, virtual_classroom, arch_virtual_classroom, workshop_seminar	When this field is not provided, the default value is "classroom".
duration	no	Once	Any Text	This field will contain duration information of the course.	
description	no	Once	Any Text	This field will contain the description of the course.	
audience	no	Multiple	Any Text	This field described the target audience of this course.	

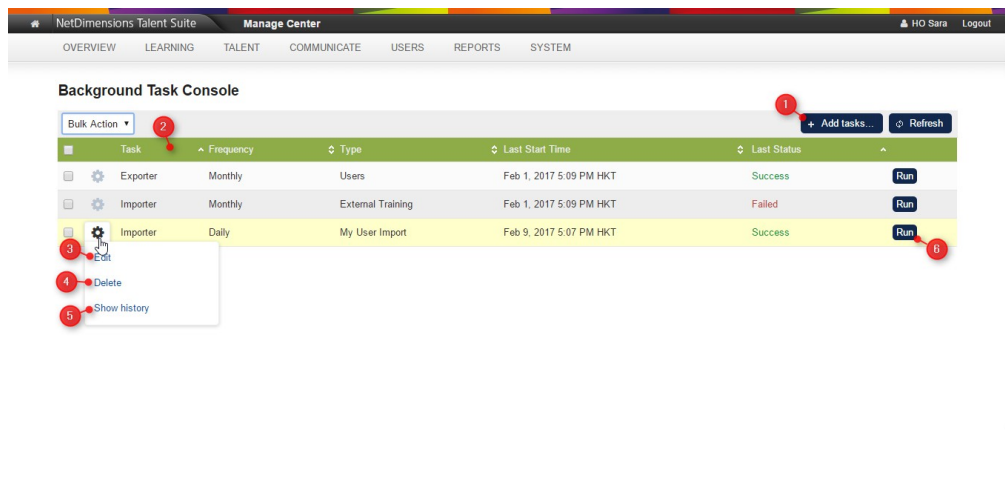
moreInfoLink	no	Once	Any Text	This field is used to provide additional info not mentioned in any of the other fields on this course.	
showInCatalog	no	Once	Boolean	Valid Values: true, false, 1, 0	
moduleAttribute	no	Multiple	NA	This field contains all the information needed to define the module attribute. The next two fields below are part of this node.	
code	yes	Once	Any Text	The module attribute code which is defined in the LMS.	The module attribute code must already be defined in the LMS before doing the upload. If the module attribute is not defined, this field will be ignored.
value	yes	Once	Varies	This is the value of the module attribute.	The data type will vary depending on the configuration in the LMS.
prerequisite	no	Multiple	NA	This is a multiple field that will define the courses required before a user can enroll to this course.	
learningid	yes	Once	Text	This field is the course id of the prerequisite course.	If the course id does not exist in the LMS, that particular prerequisite will be ignored and the remaining prerequisites will be processed if any.

enrollmentPolicyName	no	Once	Any Text	This is the name of the enrollment policy assigned to the course.	If the given policy does not exist in the LMS, it will be set to the "default policy".
cost	no	Once	NA	This node defines the cost details for the course and session.	Can be applied to both course and session.
costType	yes	Once	Text	The type of the cost. Valid Values: noCharge, useModuleSetting, perRegistration, onlinePayment	If the cost type is invalid, the whole cost node will be ignored.
value	yes	Once	Decimal	The numeric decimal value representing the cost.	
currency	yes	Once	Currency	Currency defined in ISO currency code list. (E.g USD, GBP, etc.)	
optionalItem	no	Multiple	NA	This node defined the details of optional payment items	
code	yes	Once	Any Text	The optional item code that exists in the LMS.	If the code does not exist in the LMS, the optional items node will be ignored.
value	yes	Once	Decimal	Numeric decimal value of the optionalItem	
offering	yes	Once	Text	Type of offering of the optional payment item. Valid Values: night, unit, business_night, week, percent	
session	no	Multiple	NA	Defines a session of a course.	
code	yes	Once	Any Text	The session code that uniquely identifies the session.	Unique within a course.
title	no	Once	Any Text	A text that defines the title for the session.	

enrollmentStart	no	Once	Date Time	Date and time when enrollment starts.	This is not the start date of the course.
enrollmentEnd	no	Once	Date Time	Date and time when enrollment ends.	This is not the end date of the course.
geographicRegion	no	Once	Any Text	Free text that defined the geographic region of the course.	
orgCodeConstraint	no	Multiple	Any Text	Organization codes existing in the LMS that are allowed to enroll to this course.	If the organization code does not exist in the LMS, it will be ignored.
enrollmentLimit	no	Once	Non-negative Integer	Integer from zero and above that defines the capacity of the course.	
trainingHours	no	Once	Decimal	Defines the duration of the course in hours.	
sessionStatus	no	Once	Text	Valid Values: active, pending, completed,closed, cancelled, invitation, prompt, retired	
cost	no	Once	NA	Please refer to course cost (above). The cost for session and for course are defined the same.	
class	no	Multiple	NA	A node that defines the classes within a session.	
classStart	no	Once	Date Time	Start date and time of the class.	
classEnd	no	Once	Date Time	End date and time of the class.	
roomName	no	Once	Any Text	A free text that defines the room name of the class.	
venue	no	Once	Any Text	A free text that defines the venue of the class.	

certification	no	Once	Any Text	A certificate name existing in the LMS to be assigned to the course.	If the certification does not exist in the LMS, it will be ignored.
---------------	----	------	----------	--	---

Scheduled Imports and Exports



The Background Task Console allows you to manage recurring imports and exports at hourly, daily, weekly, or monthly intervals. Here you can:

1. Schedule a new task
2. View a summary of tasks
3. Edit a task
4. Delete a task (individually or in bulk)
5. View task run history
6. Run a task on demand

Adding a Task

To add a new task

1. Specify if task is an Export or Import
2. Specify the Frequency (Hourly, Daily, Weekly, or Monthly)
3. Provide a Title for the Task
4. Specify the type
5. Specify a URL for the import/export file. The following schemes are supported:
 - file: (exported data is written to a file on the local file system)
 - ftp: (exported data is uploaded to a file on an FTP server)
 - [http/https](http://): (exported data is submitted using HTTP POST)

If the URL points to a directory when the file: scheme is used, the importer will scan the directory for all files that do not have the .imported file name extension. Every matching file will be processed and then the .imported file extension added to the file name.

6. Specify an e-mail for task start/end notifications

NetDimensions Talent Suite Manage Center HO Sara Logout

OVERVIEW LEARNING TALENT COMMUNICATE USERS REPORTS SYSTEM

Background Task Console >

Add background task

Task: Exporter (1)

Frequency: Monthly (2)

Title: Monthly Users Export (3)

Type: usersCsv (4)

XML URL: ftp://uname:pwd@ftp.abc.com/data/users.csv (5)

E-mail: ndadmin@netdimensions.com (6)

Save

Task Types

1. imsEnterprise
2. courses
3. trainingHistory
4. turboTrainingHistory
5. usersCsv
6. organizationsCsv
7. jobProfilesCsv
8. tncUsersCsv
9. geUsersCsv
10. courseCsv
11. programCsv
12. trainingHistoryCsv
13. ekpXml
14. aiccPackage
15. userMergeXml
16. certificationCsv
17. autoEnrollment
18. sfiaImport
19. externalTrainingCsv
20. ServiceNowExamDataFeed
21. mainExamImports
22. examSectionImports
23. examSectionQuestionImports
24. trainingHistoryXml
25. completedTrainingRecordsXml
26. users200510Xml
27. modules
28. ...

Hourly Schedules

Tasks defined in imports-hourly.opml and exports-hourly.opml are run on the hour, every hour.

Daily Schedules

Tasks defined in `imports-daily.opml` and `exports-daily.opml` will be run daily. You can configure the hour of the day at which daily tasks are run by setting the value of the `system.handlerstarttime` property in `WEB-INF/conf/ekp.properties`. The value should be an integer between 0 and 23 inclusive. By default, daily tasks run at 3 a.m. For example, the property below configures daily tasks to run at 11 p.m.

```
system.handlerstarttime=23
```

Weekly Schedules

You can configure the day of the week on which weekly tasks are run by setting the value of the `system.handlerStartDayOfWeek` property in `WEB-INF/conf/ekp.properties`. The value should be an integer between 1 and 7 inclusive, with 1 denoting Sunday and 7 denoting Saturday. By default, weekly tasks run on Sunday. Weekly tasks run at the same hour of the day as daily tasks. For example, the property below configures weekly tasks to run on Saturday.

```
system.handlerStartDayOfWeek=7
```

Monthly Schedules

Monthly tasks always run on the first day of the month, at the same hour of the day as daily tasks.

Run Scheduled Import/Export On Demand

OPML Files

In addition to the UI, there is also a series of configuration files in `WEB-INF/conf` for the different intervals:

- `imports-hourly.opml`
- `imports-daily.opml`
- `imports-weekly.opml`
- `imports-monthly.opml`
- `exports-hourly.opml`
- `exports-daily.opml`
- `exports-weekly.opml`
- `exports-monthly.opml`

These files contain task definitions in an xml format:

```
<?xml version="1.0" encoding="UTF-8"?>
<opml version="1.0">
<head/>
<body>
<outline type="trainingHistoryCsv"
xmlUrl="file:/c:/data/group-enrollment.csv"/>
<outline type="users200510Xml"
xmlUrl="file:/C:/temp/out/users.xml"/>
<outline type="trainingHistoryXml"
xmlUrl="ftp://uname:pwd@ftp.abc.com/data/trainingHistory.xml"/>
<outline type="csUsersCsv"
xmlUrl="https://competencysuite.abc.com/cgi/userimporter.asp"/>
</body>
</opml>
```

The tasks will then be run as scheduled or on demand via Scheduled Tasks where you can also view the run history:

Task	Frequency	Type	Last Start Time	Last Status	Next Run Time	Task Status
Reset action execution statistics	Daily	Routine Administration	Feb 12, 2017 5:09 PM HKT	Success	Feb 13, 2017 5:02 PM HKT	Active
Suspend Inactive Users	Daily	Routine Administration	Feb 12, 2017 5:09 PM HKT	Success	Feb 13, 2017 5:02 PM HKT	Active
Web Catalog Refresh	Daily	Routine Administration	Feb 12, 2017 5:09 PM HKT	Success	Feb 13, 2017 5:02 PM HKT	Active
Daily OPML Imports	Daily	Importer	Feb 12, 2017 5:09 PM HKT	Exceptions	Feb 13, 2017 5:02 PM HKT	Active
Daily OPML Exports	Daily	Exporter	Feb 12, 2017 5:09 PM HKT	Success	Feb 13, 2017 5:02 PM HKT	Active
Show history	Interval Reminder	Application	Feb 12, 2017 5:09 PM HKT	Success	Feb 13, 2017 5:02 PM HKT	Active
Run	Updates Task	Application	Feb 12, 2017 5:09 PM HKT	Success	Feb 13, 2017 5:02 PM HKT	Active
Set Session Status To Ended	Daily	Application	Feb 12, 2017 5:09 PM HKT	Success	Feb 13, 2017 5:02 PM HKT	Active

Web Services

PeopleFluent LMS provides a number of web services that can be used by other applications for data import and export. These web services are designed according to the REST (Representational State Transfer) architecture See <http://www.ics.uci.edu/~fielding/pubs/dissertation/top.htm>. You may use this API on an on-demand basis, as well as part of machine-to-machine communications that are automated via scripts or other processes. For example:

- contentGenerator/trainingHistoryXml
- contentGenerator/completedTrainingRecordsXml

For more information, please refer to [EN049 PeopleFluent LMS API](#).

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