RSS TRAINING

Enrollment (Managing Attendance)

Importing

Importing is a tool than can be used to import attendance using an Excel spreadsheet. Records are matched to users by email address.

Important note: Importing is the only option to record attendance for learners who have not created an account. If an attendance record is imported and no matching user account is found, the records would be placed into a holding table until a learner with a matching email address creates an account. At the time the learner creates the account, the imported record pertaining to the matched learner would then be assigned to the learner.

Step 1- Access your **Series** and applicable **Session**.

Step 2- Click on **Enrollments**.

Step 3- Click on **Settings**.
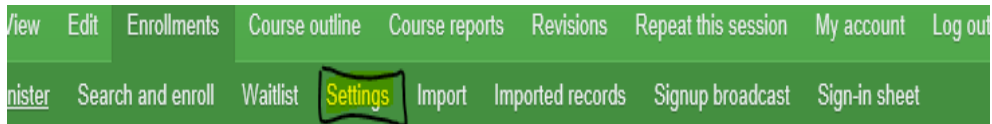
a. Ensure **Enrollments** are closed.

Note: The SMS section is not relevant when you are enrolling using the importing spreadsheet.

b. **OPTIONAL:** Check **Send confirmation** if you want to send an email to every learner that you enroll using the importing tool.

Example:

Thank you for attending the session, [Insert Title]. The credits have been added to your "Session Credit" under Activities from your profile page, http://cce.upmc.com.

Step 5- Click on **Import.**

View	Certificate	Edit	Enrollments	Faculty	Workflow	Course outline	Course reports	Revisions	Repeat this session
dminister	Search and enroll	Waitlist	Settings	Import	Imported records	Signup broadcast	Sign-in sheet		

a. Download the template (or use a previously saved version).

Import

Import CSV files with one or more of these columns: external_co
province, country, participant_category.

- Columns external_course_id, external_user_id, external_
- Download a template

Delimiter

b. The spreadsheet will include the following fields. **Enter the highlighted fields as listed below**:

external_course_id	Leave Blank	
external_user_id	Leave Blank	
*external_email	User Email Address	Required.
title		
first_name	First Name	Optional but recommended.
last_name	Last Name	Optional but recommended.
enrollment_start	Leave Blank	
enrollment_end	Leave Blank	
credits	Leave Blank	
credit_type	Leave Blank	
credit_expiration	Leave Blank	
complete	Leave Blank	
date_completed	Leave Blank	
**attended	1	Required.
city	Leave Blank	
province	Leave Blank	
country	Leave Blank	
participant_category	Leave Blank	

* Records are matched to users by email address
**You must enter a "1" in this field or the learner will not receive credit.
Tip: It is easier to look-up attendance records if you enter a first and last name.

Below is an example of a completed spreadsheet:

external_email	title	first_name	last_name	enrollment_start	enrollment_end	credits	credit_type	credit_expiration	complete	date_completed	attended
Test@upmc.edu		Test	Tester								1
Test1@upmc.edu		Test1	Tester1								

c. Once you have everyone entered in the document, save to your computer (you will need to access the saved spreadsheet in the next step). **Important Note:** Do not change the file type. It must be a

CSV (Comma delimited) (*.csv) file type.

d. Under "file" click **Choose File** and upload the document.

File
Select a different file from your local system.

Choose File   No file chosen

e. Check the box at the bottom "Assign records immediately" and "Import".

Assign

☑ Assign records immediately
This will attempt to assign records immediate
WARNING: This has performance issues wit

Import

f. Once imported, a message will display on the screen.

Success Example:

Created 3 imported transcript records.

Failure Example:

Some records could not be imported. Download skipped records.

Failed importing 1 imported transcript record.

Invalid transcript record: missing user information

g. To view imported record, choose Imported Records.

| Administer | Search and enroll | Waitlist | Settings | Import | Imported records | Signup broadcast | Sign-in sheet |

TID	External ID	Nid	External UID	Uid	First	Last	Email	Member ID	Title	Enroll start	Enroll end	Complete	Date completed	Credits	Credit type	Credit expiration	Processed	Attended
3075		943		48			splanemj@upmc.edu			Thu, 04/04/2019 - 12:00am		Yes	Thu, 04/04/2019 - 12:00am	1.00			Yes	Yes