



COMPLIANCE IMPORTS

Instructions for Template Files

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Instructions for Compliance Import Templates

The following information guides you through the import templates used for data uploads to the Skillsoft Percipio Compliance, Advanced Compliance and Academy platforms.

Applicable Imports by Product

Each of the Compliance platforms supports certain import types, while other imports are not needed. For example, customers who use Percipio Compliance will add learner information directly into Percipio and will not need a batch learner import for Compliance. Academy Standalone does need a batch import for learner information.

The table below indicates the imports supported for each of the Compliance platform products.

	Percipio Compliance	Skillport Advanced Compliance	Academy Standalone
Learner Information	N/A	N/A	*
Group Information	N/A	*	*
Group Assignments	*	*	*
Individual Assignments	*	*	*
Completions and Equivalencies	*	*	*
Learning Program Child Course Equivalency	*	*	*
Other Courses	*	*	*
Exemptions	*	*	*

All import files must be in comma-separated values (CSV) format. To save a Microsoft™ Excel file in CSV format:

1. Open the file in **Excel**.
2. Choose **File > Save As**.
3. Select the location on your local computer to save the file.
4. Choose **Save as type**: as **CSV (Comma delimited) (*.csv)**.

! Important: Any field containing a value that includes a comma (e.g. "Doe, Jane") must be wrapped in double quotes. Microsoft™ Excel will add these double quote delimiters in your file automatically, as needed.

! Important: If any of the data in your file contains logogram (e.g. Chinese, Korean, and Japanese) characters, you must save your file as Unicode TXT encoding. When saving a file from Microsoft™ Excel, the Unicode TXT format will automatically convert your data to tab delimited .TXT format instead of comma delimited. This will require some configuration changes on the import screen when setting your file for import.

! Important: The first column of the import file must be populated with data. You may order your data columns in any way you choose, although following the import templates precisely is recommended for simplification and troubleshooting. Regardless how your data is ordered, the first column must contain data, or the import interprets the file as empty.

Learner Import

For Academy Standalone sites, a Learner Information Import will add users to the site with their demographic attributes.

The template file for this import is **LearnerImport.csv**

Field Name	Description	Accepted and Default Values	Required
User ID	<p>Unique identifier for the user to access the system. This value must be unique for each user in the site.</p> <p>Recommended user ids include email address or employee number. If first initial + last name is used, duplicates are very likely, and therefore are not recommended.</p> <p>Special characters such as apostrophes, double quotes, %, *, (,), #, \$, and & should be avoided.</p>	Alphanumeric up to 256 characters	Yes

Field Name	Description	Accepted and Default Values	Required
Full Name	Used in place of separate Last Name and First Name fields.	Last name, first name Or Last name, first name, mi	
Password	Password the learner will use to access the system. Passwords should be secure and private alphanumeric values. Employee numbers often work well for a starting password. Sites can be configured to force users to change this password on the first login.	Alphanumeric up to 40 characters	Yes
Last Name	Learner's last name	Alphanumeric up to 256 characters	Yes
First Name	Learner's first name	Alphanumeric up to 256 characters	Yes
Middle Initial	Learner's middle initial	Alphanumeric	
Email Address	Learner's email address. If you want to utilize the Academy email system to notify users of upcoming or overdue training, Learner Email must be included.	Alphanumeric up to 256 characters	
Supervisor Email	A learner's supervisor or manager email address	Alpha up to 128 characters	
Supervisor Level 2 Email	A learner's second level manager or a manager's supervisor email address.	Alpha up to 128 characters	

Field Name	Description	Accepted and Default Values	Required
Security Level	1 = Learner; 10 = Administrators If custom security levels 2 – 9 are defined for the site, those values may also be used here.	Numeric 1-10 Default: 1	
Status	Learner's status within the system	Active or Inactive	
Send Email	Boolean value indicating if a user should receive automated email messages from the Academy system.	{True, False} Default: True	
Customer-defined field 1	Text field shown in reports. Not used to create groups or filter users in report.	Alphanumeric up to 256 characters	
Customer-defined field 2	Text field shown in reports. Not used to create groups or filter users in report.	Alphanumeric up to 256 characters	
Demographic 1	Customer-defined value (e.g. Job Role, Location). Used to define demographic groups and create filters for reports and email notifications	Alphanumeric up to 256 characters	
Demographic 2	Customer-defined value 2	Alphanumeric up to 256 characters	
Demographic 3	Customer-defined value 3	Alphanumeric up to 256 characters	
Demographic 4	Customer-defined value 4	Alphanumeric up to 256 characters	
Demographic 5	Customer-defined value 5	Alphanumeric up to 256 characters	

Field Name	Description	Accepted and Default Values	Required
Demographic 6	Customer-defined value 6	Alphanumeric up to 256 characters	
Demographic 7	Customer-defined value 7	Alphanumeric up to 256 characters	
Demographic 8	Customer-defined value 8	Alphanumeric up to 256 characters	
Demographic 9	Customer-defined value 9	Alphanumeric up to 256 characters	
Demographic 10	Customer-defined value 10	Alphanumeric up to 256 characters	
Demographic 11	Customer-defined value 11	Alphanumeric up to 256 characters	
Demographic 12	Customer-defined value 12	Alphanumeric up to 256 characters	
Demographic 13	Customer-defined value 13	Alphanumeric up to 256 characters	
Demographic 14	Customer-defined value 14	Alphanumeric up to 256 characters	
Demographic 15	Customer-defined value 15	Alphanumeric up to 256 characters	

Use of Multiple Demographic Values

Sites that use multiple demographics can format the data in any of the 15 demographic fields using the following information. The value separators in this case are tildes (~).

Description	Format	Example
Replace learner's existing demographic values with all new values.	Value1~value2~values3	For Jane Doe, the import file has the following values for Job Role: engineer~designer~manager If Jane Doe has job roles of "assistant, office, employee" today, after the import of the above values, her new demographics for job role will be "engineer, designer, manager".
Add new demographic values to learner's existing values	~value1~value2~value3	For Jane Doe, the import file has the follow values for Job Role: ~engineer~designer~manager If Jane Doe has the job roles of "assistant, office, employee" today, after the import, her new demographics for Job Rile will be "assistant, office, employee, engineer, designer, manager".

Create Group Import

The Group Information import is used to create new demographic groups in your Academy or Advanced Compliance site.

The template file for this import is **CreateGroupImport.csv**

Important! Column headings in the CSV file must be replaced with the demographic category names used in your compliance site.

Field	Description	Example
Demo1	Customer defined value 1. Replace the column heading with your demographic category name (e.g. Job Location)	Job Location: Rochester
Demo2	Customer defined value 2. Replace the column heading with your demographic category name (e.g. Job Level)	Job Level: Manager
Demo3	Customer defined value 3. Replace the column heading with your demographic category name (e.g. Job Level)	State: NY
... Repeat as needed up to 15		

Example

Job Location	Job Level	State	Job Role
Rochester			Engineer
	Manager		
	Manager	NY	
	Manager	CA	
	Employee	CA	

The import above will create five Demographic Groups in the site:

1. Rochester / Engineer
2. Manager
3. Manager / NY
4. Manager / CA
5. Employee / CA

Group Requirement Import

The Group Requirement import allows you to add course assignments to demographic groups.

The template file for this import is ***GroupRequirementImport.csv***

Field	Description	Accepted and Default Values	Required
Group Title	The course is assigned to this demographic group Format: Demo1/Demo2/...	Any demographic label separated by forward slashes. Example: Manager/NY	Yes
Course Name or Course ID	The course title or course id of the course to assign to the group. If the Course Title is used, it must match exactly the course title in the site. There can be no extra blank spaces before or after the title in the import file. If you prefer to use course id, this is the numeric value associated with the course and can be found in the Library section of the Academy or ACM.		Yes
Type	Type of assignment – required or optional.	{R, O}	Yes

Field	Description	Accepted and Default Values	Required
(Required or Optional)		Default: R	
Due Date	Due date for the first recurrence of an RDD assignment.	MM/DD/YYYY Default: None Example: 12/31/2020	Yes, if assignment type is RDD
Recurring	Is this a recurring assignment? If the assignment should recur, then enter "Yes". If this is one-time-only, then enter "No"	{Yes, No, Y, N, yes, no} Default: Yes	
Recurring Frequency	If this is a recurring assignment, how frequently should it recur?	# days/week/years Default: 99 years Example: 365 days 1 years 52 weeks	
Passing Threshold	Score required on the test to achieve completion for the course.	Numeric 0 – 100 Default: 100	
Assignment type	Type of assignment. Options include One time only (OTO) Recurring by Completion Date (RCD) Recurring by Due Date (RDD)	{OTO, RCD, RDD} Default: RDD	
Open for Retraining Value	Number of days prior to the recurring due date the course will be available for the user to launch and generate a new completion.	Numeric 0 – 730 Default: 90	

Field	Description	Accepted and Default Values	Required
Open for Initial Training	Number of days prior to the initial training due date the course will be available for the user launch and generate a completion.	Numeric 0 – 730 Default: 90	
Initial Training Basis	Determines how initial training due date will be calculated. 0 means “X days after assignment” or days-based 1 means calendar-based due date or explicit due date	{0, 1} Default: 1	
Initial Training Value	The value used with the Initial Training Basis value. If Initial Training Basis is days-based (0) this is the number of days after the user receives the assignment that will generate the user’s first due date. If initial Training Basis is calendar-based, this is the explicit calendar date for initial training.	Numeric 0 – 730 for days-based initial training. MM/DD/YYYY for calendar-based initial training. Default: <ul style="list-style-type: none"> 90 (for days-based) 1 year from import date (for calendar-based) Examples: <ul style="list-style-type: none"> 30 12/31/2019 	

Individual Requirement Import

The Individual Assignments import allows you to assign courses to individual learners.

The template file for this import is ***IndividualRequirementImport.csv***

Field	Description	Accepted and Default Values	Required
User ID	Learner's User ID to which the course will be assigned.	Alphanumeric	Yes
Last Name	Learner's last name. <i>This data is not imported.</i> This is simply to improve readability of the data in the file	N/A	
First Name	Learner's first name. <i>This data is not imported.</i> This is simply to improve readability of the data in the file	N/A	
Course Name or Course ID	The course name or course id of the course to assign to the group. If the Course Name is used, it must match exactly the course title in the site. There can be no extra blank spaces before or after the title in the import file. If you prefer to use course id, this is the numeric value associated to the course		Yes

Field	Description	Accepted and Default Values	Required
	and can be found in the Library section of the Academy or ACM.		
Type (Required or Optional)	Type of assignment – required or optional.	{R, O} Default: R	Yes
Due Date	Due date for the first recurrence of an RDD assignment.	MM/DD/YYYY Default: None Example: 12/31/2020	Yes, if assignment type is RDD
Recurring	Is this a recurring assignment? If the assignment should recur, then enter “Yes”. If this is one-time-only, then enter “No”	{Yes, No} Default: Yes	
Recurring Frequency	If this is a recurring assignment, how frequently should it recur?	# days/week/years Default: 365 days Examples: <ul style="list-style-type: none"> • 365 days • 1 years • 52 weeks 	
Passing Threshold	Score required on the test to achieve completion for the course.	Numeric 0 – 100 Default: 100	

Field	Description	Accepted and Default Values	Required
Assignment Type	Type of assignment. Options include One time only (OTO) Recurring by Completion Date (RCD) Recurring by Due Date (RDD)	{OTO, RCD, RDD} Default: RCD	
Open for Retraining	Number of days prior to the recurring due date the course will be available for the user to launch and generate a new completion.	Numeric 0 – 730 Default: 90	
Open for Initial Training	Number of days prior to the initial training due date the course will be available for the user launch and generate a completion.	Numeric 0 – 730 Default: 90	
Initial Training Basis	Determines how initial training due date will be calculated. 0 means “X days after assignment” or days-based 1 means calendar-based due date or explicit due date	{0, 1} Default: 0	

Field	Description	Accepted and Default Values	Required
Initial Training Value	<p>The value used with the Initial Training Basis value.</p> <p>If Initial Training Basis is days-based (0) this is the number of days after the user receives the assignment that will generate the user's first due date.</p> <p>If initial Training Basis is calendar-based, this is the explicit calendar date for initial training.</p>	<p>Numeric 0 – 730 for days-based initial training.</p> <p>MM/DD/YYYY for calendar-based initial training.</p> <p>Default: 90</p> <p>Examples:</p> <ul style="list-style-type: none"> • 30 • 12/31/2019 	

Historical Completion Import (Completions and Equivalencies)

The historical data import adds completion records for Compliance non-WBT courses, or adds equivalencies to the online courses.

Important! Records for non-WBT courses are uploaded as completions (C). Records for WBT courses are uploaded as equivalencies (EQ).

The template file for this import is ***HistoricalCompletionsAndEquivalencies.csv***.

Field	Description	Format and Default Value	Required
UserID	<p>Learner's user id to which the completion record will be assigned.</p> <p>Must match an existing user id in the Compliance system.</p>	Alphanumeric up to 256 characters	Yes

Field	Description	Format and Default Value	Required
Last Name	Learner's last name. <i>This data is not imported.</i> This is simply to improve readability of the data in the file	N/A	
First Name	Learner's first name. <i>This data is not imported.</i> This is simply to improve readability of the data in the file	N/A	
Other Course Name or Other Course ID	The course title or course id. If the text title is used, it must match exactly the title in the compliance system (e.g. no leading or training spaces).	Alphanumeric	Yes
Completion Date	Date learner completed the course. This will be the completion date or the equivalency data uploaded to the compliance system.	MM/DD/YYYY	Yes
Due Date	<i>This for historical completion or equivalency records only</i> (those for which the learner does not have an open assignment in the compliance system at the time of upload). Date the	<i>Default:</i> Date Completed	

Field	Description	Format and Default Value	Required
	<p>course was due for the user. If not provided, this will default to the Date Completed.</p> <p>This is the date associated with the completion, not the next due date you expect to see in the system.</p>		
Recurring Frequency	If this is a recurring assignment, how frequently should it recur?	<p># days/week/years</p> <p>Default: 365 days</p> <p>Examples:</p> <ul style="list-style-type: none"> • 365 days • 1 years • 52 weeks 	
Comments	Any comments or text needed to track the record, e.g. why an equivalency is being granted, or the name of the system in which the user completed the require training.	Alphanumeric up to 200 characters	
Required or Optional	Indicates if the course assignment was required or optional.	Default: Required	

Field	Description	Format and Default Value	Required
Score	Score the learner achieved on the course, if applicable.	1-100	

Learning Program Child Course Equivalency

The Learning Program Child Course Equivalency import allows you to load equivalencies for the courses inside a Learning Program that is assigned to a learner.

The template file for this import is **LP_ChildCourseEQ.csv**.

Field	Description	Format and Default Value	Required
User ID	Learner's user id to which the completion record will be assigned. Must match an existing user id in the Compliance system.	Alphanumeric up to 256 characters	Yes
Last Name	Learner's last name. <i>This data is not imported.</i> This is simply to improve readability of the data in the file	N/A	
First Name	Learner's first name. <i>This data is not imported.</i> This is simply to improve readability of the data in the file	N/A	

Field	Description	Format and Default Value	Required
Course Name or Course ID	The course title or course id. If the text title is used, it must match exactly the title in the compliance system (e.g. no leading or training spaces).	Alphanumeric	Yes
Learning Program Name or Learning Program ID	The title or ID number of the learning program. The ID number can be found in the Learning Program interface in the compliance system. If title is provided, it must match the course title in the compliance system exactly (e.g. trailing or leading spaces).	Alphanumeric	Yes
Equivalency Date	Date learner completed the course. This will be the equivalency data uploaded to the compliance system.	MM/DD/YYYY	Yes
Comments	Any comments or text needed to track the record, e.g. why an equivalency is being granted, or the name of the system in which the user completed the require training.	Alphanumeric up to 200 characters	

Other Course Import

The Course Catalog import allows you to import titles you want to assign and track for your learners that are not AICC or SCORM web-based courses. This import will add titles and metadata to your Compliance Library.

The template file for this import is ***OtherCourseImport.csv***.

Field	Description	Format and Default Value	Required
Course Title	Course title to be uploaded. This must be unique within the site; it cannot match a web-based course or any of the other courses in the catalog.	Alphanumeric up to 128 characters	Yes
Date Added	Date of import	MM/DD/YYYY	
Description	Course description	Text	
Objectives	Course objectives	Text	
Audience	Audience for whom the course is created	Text	
Version	Version number of the course	Alphanumeric up to 12 characters	
URL	<i>Use with HTML Link (LNK) content only.</i> URL to launch a document. Opens in a new tab for the user when launched. This may be a URL to a web-hosted document, or it may be a direct path to a document hosted on your intranet, including Sharepoint.	Alphanumeric up to 400 characters	

Field	Description	Format and Default Value	Required
Completion Type	<p>Use with HTML Link (LNK) content only. Specify how the user achieves a completion for the course:</p> <ul style="list-style-type: none"> • Immediately upon launch • By seeing a confirmation dialog • Manual entry by the admin 	<p>Default: Manual</p> <p>Options:</p>	
Category	<p>One of the category options defined in the Compliance system.</p> <p>ESH Environmental, Safety & Health</p> <p>FUN Fundamentals</p> <p>HR Human Resources</p> <p>OTHER Other</p> <p>ETHICS Ethics & Code of Conduct</p> <p>QUAL Quality</p> <p>STRA Strategic</p> <p>TECH Technical</p> <p>CARE Adult Care</p> <p>HOSP Hospitality and Leisure</p> <p>FOOD Food Safety</p> <p>ALC Alcohol Safety</p> <p>HAR Harassment</p>		

Field	Description	Format and Default Value	Required
	TRNS Transportation		
Delivery Method	<p>One of the delivery method options defined in the Compliance system. It can be the full text or the abbreviation (e.g. classroom or CR)</p> <p>WBT Web-based Training</p> <p>OJT On-the-Job Training</p> <p>CBT Computer-based Training</p> <p>VID Video</p> <p>DOC Required Reading</p> <p>PP Powerpoint Presentation</p> <p>LL Lessons Learned</p> <p>SIM Simulator</p> <p>LAB Laboratory</p> <p>WS Workshop</p> <p>CR Classroom</p> <p>PSB Pre-shift Briefing</p> <p>PWB Pre-work Briefing</p> <p>TO Test Out</p> <p>OTR Other</p> <p>LNK HTML Link</p> <p>OLT Offline Task</p> <p>HOn Hands-on</p> <p>TSK Task</p> <p>LP Learning Program</p>		

Field	Description	Format and Default Value	Required
Approved Date	Date the course was approved or released.	Date format MM/DD/YYYY	
Allow Exemption	Determine if exemptions may be applied to the course.	Yes/No 1/0	
Allow Equivalency	Determine if equivalencies may be applied to the course.	Yes/No 1/0	
Author	Author of the content.	Alphanumeric up to 50 characters.	
Client Drivers	Internal procedures, processes and regulatory drivers that determine why the course is needed or which employees should take the course.	Text	
Related Drivers	Other related procedures processes, or regulatory drivers for the course.	Text	
Primary Drivers	Key regulatory drivers for the course.	Text	
Estimated Duration	Estimated time to complete the course, hours.	Numeric	

Field	Description	Format and Default Value	Required
Cost	Cost of the course, often used for internal chargebacks within an organization.	Money in format \$0.00	
CEU	Continuing Education Units	Numeric, may include decimal values.	

Exemption Import

Exemptions import allows you to import exemptions for specified courses to individual users.

The template for this import is ***ExemptionsImport.csv***.

Field	Description	Format and Default Value	Required
User ID	Learner's user id to which the completion record will be assigned. Must match an existing user id in the Compliance system.	Alphanumeric up to 256 characters	Yes
Last Name	Learner's last name. <i>This data is not imported.</i> This is simply to improve readability of the data in the file	N/A	
First Name	Learner's first name. <i>This data is not imported.</i> This	N/A	

Field	Description	Format and Default Value	Required
	is simply to improve readability of the data in the file		
Course Name or Course ID	The course title or course id. If the text title is used, it must match exactly the title in the compliance system (e.g. no leading or training spaces).	Alphanumeric	Yes
Expiration Date	Date the exemption should expire. This is the date the course will again become available for the user to launch.	MM/DD/YYYY	Yes
Exemption Date	Date learner is granted the exemption. This is the date the exemption takes effect.	MM/DD/YYYY Default: Current date	
Comments	Any comments or text needed to track the record, e.g. why an exemption is being granted.	Alphanumeric up to 200 characters	