Instructions to bulk upload course attendance

1. Click the Manage Attendance Action on the Home page.

2. Select the Upload File option and click the Download Template Link to open a file to enter your attendance information.

2.1 Your Bulk Attendance Template file will open in EXCEL and will look like this.

3. Enter your Attendance information. Attendance from multiple courses may be entered on a single file.

Self-paced courses: Online self-paced or independent self-study courses

- **Username:** attendee's certification portal Username*

- **Completion Date:** Date student completed coursework.
- **Course Number:** as listed in the Certification portal.
- **Offering Start Date:** leave blank.
- **Offering End Date:** leave blank.
- **Designation:** Enter the attendee's Certification Designation**. Create a duplicate line in the sheet for the same course for each certification the attendee holds.
- **Course Type:** Specify if the course is core or elective for that designation. You will need to do this on multiple lines for each certification the attendee holds.

For example:

	A	B	C	D	E	F	G
1	Username	Completion Date (MM/DD/YYYY)	Course Number	Offering Start Date (MM/DD/YYYY)	Offering End Date (MM/DD/YYYY)	Designation	Course Type
2	ellen.examiner	10/25/2023	7737			ACISE	Elective
3	ellen.examiner	10/25/2023	7737			COE	Core

Courses that have specific Offering start and end dates

- **Username:** attendee's certification portal Username*
- **Completion Date:** leave blank.
- **Course Number:** as listed in the Certification portal.
- **Offering Start Date:** existing course offering Start Date***
- **Offering End Date:** existing course offering End date
- **Designation:** Enter the attendee's Certification Designation**. Create a duplicate line in the sheet for the same course for each certification the attendee holds.
- **Course Type:** Specify if the course is core or elective for that designation. You will need to do this on multiple lines for each certification the attendee holds.

For example:

	A	B	C	D	E	F	G
1	Username	Completion Date (MM/DD/YYYY)	Course Number	Offering Start Date (MM/DD/YYYY)	Offering End Date (MM/DD/YYYY)	Designation	Course Type
2	ellen.examiner		9178	8/29/2023	8/31/2023	ACISE	Core
3	ellen.examiner		9178	8/29/2023	8/31/2023	COE	Elective

Usernames may be found by clicking the "View Agency" action on the Home page and then select the "Users" tab.
***You can find the full list in the Certification Portal under the "Certifications" tab under the "Certification Types" subtab.**
You can also find a list of your agency's active certification's which contains both usernames and designations by clicking the "View Agency" action on the Home page and then select the "Active Certifications" tab.
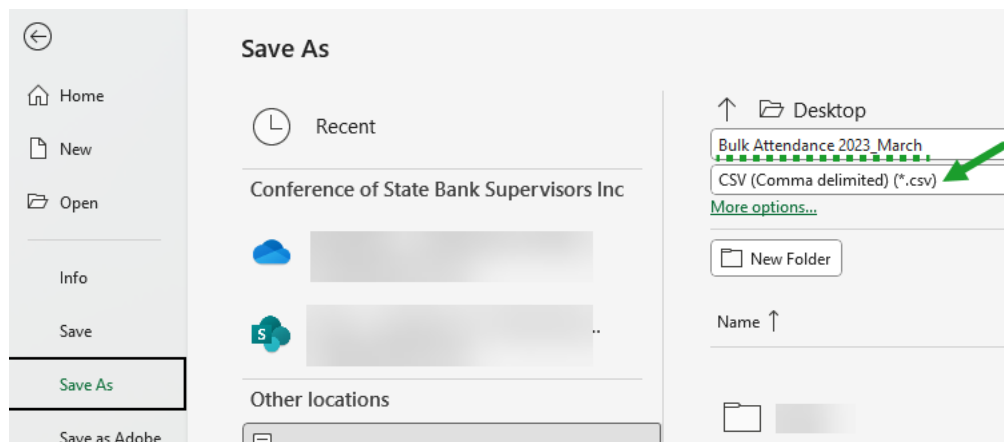**** Offering dates must match an existing Offering in the system. If the offering is not entered in the system, the upload will fail.*

4. Save the Attendance file to your computer.

    Preference is to use File/Save As in Excel to offer the ability to give a descript file name and specific folder location.

4.1 Verify that the file is saved as a CSV.
4.2 Close the file.

5. Upload the Bulk Attendance file.
5.1 Return to the Certification Portal to the Manage Course Attendance section.
5.2 Select the Upload File option.
5.3 Either click the UPLOAD button or drag your recent attendance file to the screen

Manage Course Attendance

There are two ways in which you can manage course attendance:

1. Manual Entry - This is a manual process by which you can select and search for course attendees to add. This is the easiest option if you have a small number

2. Upload File - This process requires importing information into an Excel spreadsheet in a specific format, saving the file as a .csv file, and then uploading the file

Upload Methods

○ Manual Entry   ● Upload File
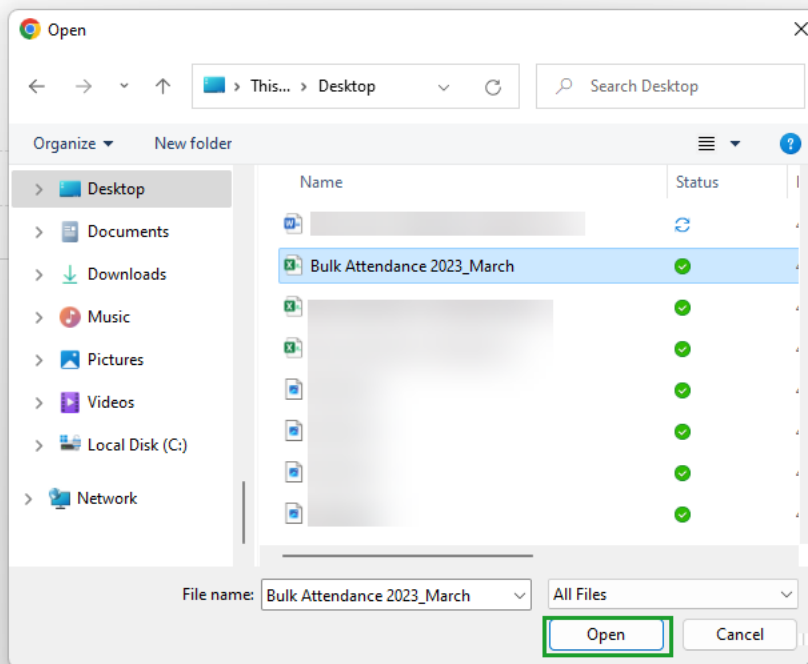
📄 Download Template

CSV File *

| UPLOAD | 📄 Drop file here |

Must contain no more than 100 entries

CANCEL

6. Once your file has been added to the system, click the Upload Attendance button.

Upload Methods

○ Manual Entry ● Upload File

📄 Download Template

CSV File *

📄 **Bulk Attendance 2023_Mar...**
CSV – < 1 KB

Must contain no more than 100 entries

CANCEL   **UPLOAD ATTENDANCE**

7. The system will validate the data and display a Validation page.
7.1 The entries that are correct will be shown on the green Valid Attendance table.
7.2 Incorrect entries are shown on the red Invalid Attendance table.
7.3 If you do not have any errors, skip to step 9.

Valid Attendance

| Username	Completion Date	Course Number	Course Format	Offering Start Date	Offering End Date	Designation	Course Type
Dave Deputy	8/17/2023	10006432	Online Self Paced			CME	Elective
Dexter Director	12/15/2023	10006432	Online Self Paced			ACISE	Elective
Dexter Director	12/15/2023	10006432	Online Self Paced			CAMLS	Core
Dexter Director	12/15/2023	10006432	Online Self Paced			CLIE	Elective
Dave Deputy		100033	Classroom	5/15/2023	5/20/2023	CME	Elective
Dexter Director		100033	Classroom	5/15/2023	5/20/2023	CAMLS	Core
Dave Deputy		10006437	Webinar	3/20/2023	3/20/2023	CME	Elective
Dexter Director		10006437	Webinar	3/20/2023	3/20/2023	ACISE	Core
Dexter Director		10006437	Webinar	3/20/2023	3/20/2023	CAMLS	Elective
Dexter Director		10006437	Webinar	3/20/2023	3/20/2023	CLIE	Elective

10 items

Invalid Attendance ⚠

| Username	Completion Date	Course Number	Course Format	Offering Start Date	Offering End Date	Designation ❓	Course Type	
👤 Dave Deputy ✖	08/17/2023 📅	10006432	Online Self Paced	mm/dd/yyyy 📅	mm/dd/yyyy 📅	CSBE	Core	✖
👤 Dexter Director ✖	12/15/2023 📅	10006432	Online Self Paced	mm/dd/yyyy 📅	mm/dd/yyyy 📅	CME	Core	✖
👤 Dexter Director ✖	12/15/2023 📅	10006432	Online Self Paced	mm/dd/yyyy 📅	mm/dd/yyyy 📅	CSBE	Elective	✖
👤 Edward Examiner ✖	01/12/2023 📅	10006432	Online Self Paced	mm/dd/yyyy 📅	mm/dd/yyyy 📅	COE	Core	✖
👤 Dave Deputy ✖	mm/dd/yyyy 📅	100033	Classroom	05/15/2023 📅	05/20/2023 📅	CSBE	Core	✖

8. Invalid entries must be corrected or removed before attendance can be submitted. Incorrect data will be highlighted with a red box.

8.1 You may cancel the upload and correct the errors in your Bulk upload file to resubmit or correct the errors on the screen.

8.2 Cursor over the red triangle to see the error message.
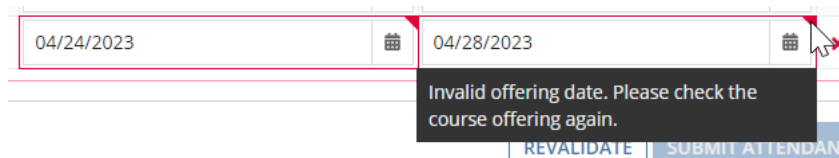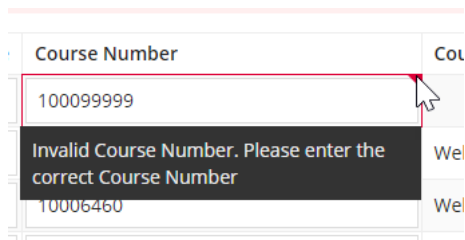
8.3 Use the red X at the end of the row to remove the entry from the upload.

8.4 When fixing the data on the screen, the red box will disappear when the correct data is entered.

Note: Offerings must exist for each course with the exact same dates to utilize the upload

8.5 Once all records have been corrected or removed, click the "REVALIDATE" button.

Valid Attendance

Username	Completion Date	Course Number	Course Format	Offering Start Date	Offering End Date	Designation	Course Type
Dave Deputy	8/17/2023	10006432	Online Self Paced			CME	Elective
Dexter Director	12/15/2023	10006432	Online Self Paced			ACISE	Elective
Dexter Director	12/15/2023	10006432	Online Self Paced			CAMLS	Core
Dexter Director	12/15/2023	10006432	Online Self Paced			CLIE	Elective
Dave Deputy		100033	Classroom	5/15/2023	5/20/2023	CME	Elective
Dexter Director		100033	Classroom	5/15/2023	5/20/2023	CAMLS	Core
Dave Deputy		10006437	Webinar	3/20/2023	3/20/2023	CME	Elective
Dexter Director		10006437	Webinar	3/20/2023	3/20/2023	ACISE	Core
Dexter Director		10006437	Webinar	3/20/2023	3/20/2023	CAMLS	Elective
Dexter Director		10006437	Webinar	3/20/2023	3/20/2023	CLIE	Elective

10 items

Invalid Attendance

Username	Completion Date	Course Number	Course Format	Offering Start Date	Offering End Date	Designation ❓	Course Type
👤 Dexter Director ✕	mm/dd/yyyy	100033	Classroom	05/15/2023	05/20/2023	CLIE	Core

CANCEL   REVALIDATE   SUBMIT ATTENDANCE

9. Once all the entries are correct (shown in the Valid Attendance table) and there are no entries in the Invalid Attendance table, click the Submit Attendance button. You will not be able to submit the attendance if there are any errors in the Invalid Attendance box.

Invalid Attendance							
Username	Completion Date	Course Number	Course Format	Offering Start Date	Offering End Date	Designation ❓	Course Type
			No items available				

CANCEL   SUBMIT ATTENDANCE

Note: If you exit the page without clicking the Submit Attendance button the upload will be canceled.

10. Click Yes on the final validation pop up.

Submit Attendance?
This action cannot be undone, would you like to continue?

NO   YES

10.1 The attendance will then be added to each user's transcript.