

# Uploading Certification Records

Certification completion records for learning completed outside of Totara Learn can be imported via CSV files.

If an imported certification already exists in Totara Learn, then a new certification completion record is created and will appear in a user's Record of Learning. If an imported certification does not exist, then a new evidence item will appear in a user's Record of Learning.

## Configuring your CSV file

The CSV import file is created outside of Totara and imported and the file needs to contain the following information:

- **username:** The username from the learner's profile.
- **certificationshortname:** The certification short name. This can be found on the Overview tab when editing a certification.
- **certificationidnumber:** The certification ID number. This can be found on the Overview tab when editing a certification.
- **completiondate:** The date the learner completed the certification. The date format can be specified in the upload settings.
- **duedate:** The due date field should indicate what the due date was at the time of completion, not when the completion is due to expire. The column must be provided in the CSV file, but can be left empty. When recertification is set to **Use certification expiry date** or **Use fixed expiry date**, then the expiry date will be calculated using the uploaded due date field. If it is empty or if the recertification is set to **Use certification completion date**, then only the completion date will be used to calculate the expiry date.

See the following as an example:

```
username,certificationshortname,certificationidnumber,completiondate,
duedate
harrychinn,health_and_safety,hs1,23/03/2012,31/06/2012
```

## Uploading completion records

To access the upload area, go to *Site administration > Courses > Upload Completion Records > Upload Completion Records*.

Choose file to upload\*

Choose a file...

You can drag and drop files here to add them.

There are required fields in this form marked \*

Select an evidence type

yyyy-mm-dd

CSV Date format

CSV Values separated by

CSV Text Delimited with

CSV File encoding

Override active certifications

Case insensitive shortnames\*

Upload

1. Once on the page you will need to scroll down to **Upload certification csv** (as the **Upload course csv** is listed above it).
2. Drag and drop your file onto the page, or click the **Choose a file** button to browse for and select the CSV file.
3. Configure you desired [settings](#).
4. Click the **Upload** button.

After the import is completed the import results are displayed. To view more detail about the import, click the **Certification import report** link. Imported records can also be accessed by going to *Site administration > Courses > Upload completion records > Certification import report*.

Completion history upload - importing certification

✓ CSV import completed

✓ Certification data imported successfully

Import results

5 Records with data errors - these were ignored

0 Records created as evidence

0 Records successfully imported as certifications

5 Records in total

[Certification import report](#)

## Settings

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The Totara Academy has a whole course dedicated to using [Programs and certifications](#) in Totara Learn.

<b>Settings</b>	<b>Description</b>	<b>Notes</b>
<b>Default evidence type</b>	Any certifications which can't be matched to an existing item will be added as evidence to a user's Record of Learning. Here you can specify the default evidence type you wish to use.	-
<b>CSV Date format</b>	The format for dates in the CSV file, for example: dd/mm/yyyy.	-
<b>CSV Values separated by</b>	The separator used to separate values in the file.	-
<b>CSV Text Delimited with</b>	The delimiter used for text values.	-
<b>CSV file encoding</b>	The type of encoding used for the file.	-

<b>Import Action</b>	<p>Choose from the following:</p> <ul style="list-style-type: none"> <li>• <b>Save to history</b> <ul style="list-style-type: none"> <li>• The imported records will be added to history.</li> <li>• The certification status of users will remain unchanged.</li> </ul> </li> <li>• <b>Certify uncertified users</b> <ul style="list-style-type: none"> <li>• If a user is already certified, the imported record is added to history.</li> <li>• If a user is not currently certified, the imported record will be used to mark them certified. If appropriate, the certification window may open and /or expire when cron next runs, causing the completion to be moved to history.</li> </ul> </li> <li>• <b>Certify if more recent</b> <ul style="list-style-type: none"> <li>• If a user is already certified and the import completion date is more recent than the current completion date, then the current completion will be moved to history and the user will be marked certified on the imported completion date.</li> <li>• If a user is already certified and the import completion date is further in the past than the current completion date, then the imported record will be added to history.</li> <li>• If a user is not currently certified, the imported record will be used to mark them certified. If appropriate, the certification window may open and /or expire when cron next runs, causing the completion to be moved to history.</li> </ul> </li> </ul>	<p>If a record is imported for a user who is not assigned to the certification, an individual user assignment will be created for them, causing them to be assigned. Assignment (or reassignment as the case may be) occurs first, then the imported record is processed, regardless of the chosen action or outcome.</p> <p>If a user is marked certified during import and the recertification window opening date is in the past, when cron runs it will open the recertification window and reset current course progress. If this is not the desired outcome then <b>Save to history</b> should probably be selected.</p>
<b>Case insensitive shortnames</b>	<p>When enabled, certification short names will be matched case insensitively.</p>	<p>-</p>