Our bulk upload function has been provided to enable data already held in your own systems to be quickly and easily exported for upload to the Construction Training Directory. The CSV schema document provides your system administrators with the technical specification for the CSV file format and details which fields should be provided. This document describes in more detail how you can use this file to upload bulk training course schedules.

**Approved Training Organisations**

An ATO can use the bulk CSV file template to create, amend or cancel training course schedules.

**Bulk Upload or Individual schedules?**

Bulk Uploads are expected to be based on data exported from another source.

**Excel Template**

We recommend you use the Excel template we provide. This includes some basic validation to make sure the information you enter meets the criteria we require and that when it is exported it uses the formats the Construction Training Directory can accept. We recommend you keep a copy of both the spreadsheet and the exported CSV, as if you need to make changes you will need to update the Excel version and re-export. It’s safe to view the file in Excel, but if you save or make changes to it this way it will fail to import. When you click export you will have the opportunity to specify a file name and location.

**Preparing the CSV file**

* We advise you download this guidance and any templates you need each time you want to add schedules to ensure you are using the most up-to-date specification.
* Please ensure all columns are present in your file and that all mandatory fields have been populated and as many optional fields as possible for each training course schedule that you wish to submit.
* Details of the information required for each column are provided in the table below. You should read these before submitting the file and always ensure you are following the latest format and guidance available online.

**Once you have checked the file; please follow these steps:**

1. Click the Export button to export in CSV format and make a note of the save location and file name.
2. Go to the “Submit Bulk Training Schedules” page in your ATO menu and click on the ‘Upload a new bulk schedule’ button. Click ‘Browse’ to find the CSV file and then ‘Submit’ to submit your schedule information.
3. You will receive feedback onscreen once the file has loaded letting you know whether the file has been uploaded successfully. This usually takes no longer than a few minutes, but may vary due to the size of your file and the number of users online at the time.
4. If the file has had some failures then you can see the details of these failures under the exception details. You can download these exceptions by clicking on the “Download Exception Details”.
5. You then have the option to download these failed records, amend them and export them into a new CSV file to start the uploading process again (Steps 1-3). You will find any failed records available for download under the “Rejected Files”.

| **Value** | **Mandatory?** | | | **Information required** |
| --- | --- | --- | --- | --- |
| **Create** | **Amend** | **Cancel** |
| **Action** | **YES** | **YES** | **YES** | **This must be either Create, Amend or Cancel a training course schedule** |
| **ID** | **N/A** | **YES** | **YES** | If creating new training schedule please leave this blank. If amending or cancelling this field must match the ID as listed against the training schedule within the Training courses area of the portal. |
| **ATO Training Course** | **YES** | N/A | N/A | Insert the name of the Training course you have created within the Construction Training Directory. The names must match exactly to previously created courses on the portal. |
| **Venue** | **YES** | **Optional** | **N/A** | Enter the venue that the training course is linked too. The names must match exactly to previously created venues on the portal. |
| **Price** | **Optional** | **Optional** | N/A | Enter the price of the training course. If not entered, price will populate from existing course details created on the portal. |
| **Start Date** | **YES** | **Optional**\*  \*if one is entered, all 4 must be completed | N/A | The date you want the training schedule to start on  NOTE: Training days do not have to be consecutive. E.g. a 4 day course could be spread over 4 weeks. The start date would be the first day of the course |
| **End Date** | **YES** | **Optional**\*  \*if one is entered, all 4 must be completed | N/A | The date you want the training schedule to end on  NOTE: Training days do not have to be consecutive. E.g. a 4 day course could be spread over 4 weeks. The end date would be the last day of the course |
| **Start Time** | **YES** | **Optional**\*  \*if one is entered, all 4 must be completed | N/A | The time you want the training schedule to start on |
| **End Time** | **YES** | **Optional**\*  \*if one is entered, all 4 must be completed | N/A | The time you want the training schedule to end on |
| **Duration** | **Optional** | **Optional** | N/A | A unique duration for an individual scheduled course schedule. Use whole numbers only.  If not entered, duration will populate from existing course details created on the portal. |
| **Duration Units** | **Optional** | **Optional** | N/A | Select the units for the duration above either hours, days or months.  If not entered, duration units will populate from existing course details created on the portal. |
| **Max. Attendees** | **Optional** | **Optional** | N/A | The maximum number of attendees allowed for the course |
| **Current Attendees.** | **Optional** | **Optional** | N/A | The current number of attendees on the course |
| **Trainer** | **Optional** | **Optional** | N/A | The individual carrying out the training. These can be peripatetic trainers |
| **Training Schedule Status** | **Optional** | **Optional** | N/A | If left blank your status will be automatically set to scheduled. If the course is full or private please choose the relevant option from the drop down. |