It’s FINALLY here!

Uploading course data using Excel spreadsheets!
Uploading Course Data Using Excel Spreadsheets

The new course data Excel upload function:

- Uses specially designed Excel spreadsheets
- Has a different spreadsheet for each program and training year combination
- Includes dropdowns to ensure data consistency
- Allows for data validation ("error checking") before upload
- Checks for and displays any data errors prior to saving data to the DMS
Uploading Course Data Using Excel Spreadsheets

How it works…

1. Log into the DMS

2. Click on the Data Entry tab on the top navigation menu
On the Data Entry Menu, select the training year, program, and type of data you want to enter course data for.
Use the Course Query form to limit the number of courses displayed on the Add/Edit Course page, OR

Click on the Add/Edit Course button to go directly to the Add/Edit Course page
On the Add/Edit Course page, click the Upload Excel File button located at the bottom of the Actions section.

<table>
<thead>
<tr>
<th>ID</th>
<th>Course Status</th>
<th>Course</th>
<th>Course State</th>
<th>Course Date</th>
<th>Course Hours</th>
<th># of Workers</th>
<th>Total Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>340208</td>
<td>PROJECTED</td>
<td>115 - HazMat Chemistry</td>
<td>TBD</td>
<td>26</td>
<td>12</td>
<td>312</td>
<td></td>
</tr>
</tbody>
</table>

**Actions:**
- Add New Record
- Upload Excel File
The Upload File form will be displayed

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Course (Y/N)</td>
<td>Required</td>
</tr>
<tr>
<td>Training Year</td>
<td>2017</td>
</tr>
<tr>
<td>Status</td>
<td>-- Please Select Status--</td>
</tr>
<tr>
<td>Program</td>
<td>-- Please Select Program--</td>
</tr>
</tbody>
</table>

**Select Excel file to upload (required)**

- [ ] Browse...
  - No file selected.

**Validate XLS file only**

Use this button to upload your Excel file to have the system test that it is valid. NO data will be saved. This feature is optional, and it allows you to test your Excel file to ensure that it is valid before you have entered all of your data.

**Upload XLS file only**

- [ ] Validate XLS file only

- [ ] Upload XLS file and save data
Links to the special WTP Excel templates are at the bottom of the form

- WTPTest DOE program 2016.xlsx
- WTPTest DOE program 2017.xlsx
- WTPTest DOE program 2018.xlsx
- WTPTest DOE program 2019.xlsx
- WTPTest DOE program 2020.xlsx
- WTPTest DOE program 2021.xlsx
- WTPTest DOE program 2022.xlsx
- WTPTest DOE program 2023.xlsx
Uploading Course Data Using Excel Spreadsheets

• Online courses and in-person courses must be in separate templates!

• For example for 2018 DOE projected data:
  o Complete the DOE_Program_2018.xlsm template with projected DOE in-person courses
  o Complete ANOTHER DOE_Program_2018.xlsm template with projected DOE online courses
  o Select ‘No’ for Online Course field on the Excel Upload form when uploading your in-person course file and Yes when uploading your online course file
Uploading Course Data Using Excel Spreadsheets

- When you open the Excel template you will see 3 tabs.
- The **ONLY** tab you should add/edit data into is the Data Entry tab.
Uploading Course Data Using Excel Spreadsheets

How to enter course data into the template:

• When you open a new Excel template, the first row is ready for you to enter course data.

• Several fields contain lists of values for you to select from. Fields that have associated select boxes will have a down arrow when that field is selected.

• Click on the arrow to see the select list for that field.

Values available for the Course Name field for DOE.
Uploading Course Data Using Excel Spreadsheets

The fields that contain select boxes are:

- Course Name
- Training Organization
- Course State
- Student State
- Supplemental Funding
- Special Circumstance
- DOE Site (DOE spreadsheet only)
Uploading Course Data Using Excel Spreadsheets

- Course data needs to be entered one row at a time.
- Rows must be added using the ‘Add another row/record’ button.
- To enter a new row, click on the ‘Add another row/record’ button on the top left corner of the Excel template.

** ALERT! ** Any rows added without using the ‘Add another row/record’ button will not upload to the database.
Uploading Course Data Using Excel Spreadsheets

Validate Your Excel Template Before Uploading

It is recommended that you use the validate ("error check") data feature prior to uploading your data to the DMS.

To validate the data in your Excel template:

1. Fill out the fields on the Excel Upload form and browse to select the file to check
2. Click on the ‘Validate XLS file only’ button at the bottom of the form
Uploading Course Data Using Excel Spreadsheets

Any errors found during validation will be displayed two ways:

1. In an error message at the top of the form, AND

   Please correct the following 3 errors:
   - Please provide a Training City in row 7
   - Please provide a Training Address 1 in row 7
   - Please provide a ZIP Code in row 7

2. By highlighting the cell(s) in the displayed form to show the issues that need to be corrected.

<table>
<thead>
<tr>
<th>COURSE NAME</th>
<th>COURSE ID</th>
<th>COURSE DATE</th>
<th>NUMBER OF STUDENTS</th>
<th>COURSE HOURS</th>
<th>STATE(S)</th>
<th>PROGRAM</th>
<th>TRAINING ORGANIZATION</th>
<th>COURSE ADDRESS 1</th>
<th>COURSE ADDRESS 2</th>
<th>COURSE CITY</th>
<th>COURSE STATE</th>
<th>COURSE ZIPCODE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Haz. Waste Site</td>
<td>109</td>
<td>2/6/17</td>
<td>1</td>
<td>45</td>
<td>SC, NC</td>
<td>DOE</td>
<td>Sub1</td>
<td></td>
<td></td>
<td></td>
<td>MD</td>
<td></td>
</tr>
</tbody>
</table>
Uploading Course Data Using Excel Spreadsheets

If errors were found during validation:

1. Correct the errors on your original Excel template
2. Validate your template again

When no more errors are found, the successful validation message will be displayed.

Your Excel file has been validated successfully. But no data has been imported.

WETPTTest_DOE_Program_2017.xlsm

Go back to the upload form

Click on the ‘Go back to the upload form’ link to return to the form to upload your Excel template to the DMS.
Uploading Course Data Using Excel Spreadsheets

To upload your Excel template of course data:

1. Fill out the fields on the Excel Upload form and browse to select the file to upload

2. Click on the ‘Upload XLS file and save data’ button at the bottom of the form
Uploading Course Data Using Excel Spreadsheets

The system will check your data before it is stored in the DMS. Any errors found will be displayed two ways:

1. In an error message at the top of the form, AND
2. By highlighting the cell(s) in the displayed form to show the issues that need to be corrected.

Please correct the following 3 errors:
- Please provide a Training City in row 7
- Please provide a Training Address 1 in row 7
- Please provide a ZIP Code in row 7

<table>
<thead>
<tr>
<th>COURSE NAME</th>
<th>COURSE ID</th>
<th>COURSE DATE</th>
<th>NUMBER OF STUDENTS</th>
<th>COURSE HOURS</th>
<th>STUDENT STATE(S)</th>
<th>PROGRAM</th>
<th>TRAINING ORGANIZATION</th>
<th>COURSE ADDRESS 1</th>
<th>COURSE ADDRESS 2</th>
<th>COURSE CITY</th>
<th>COURSE STATE</th>
<th>COURSE ZIPCODE</th>
</tr>
</thead>
</table>
Uploading Course Data Using Excel Spreadsheets

If errors were found during upload:

1. Correct the errors on your original Excel template
2. Upload your template again

When no more errors are found, the successful upload message will be displayed.

Your Excel file has been successfully imported into the DMS.
WETPTest_DOE_Program_2017.xlsm
Go back to the upload form

To upload more files, click on the ‘Go back to the upload form’ link.
Have a question or need assistance?

Contact Lynn Albert

By phone: 919-794-4709 or
Email: lalbert@michaeldbaker.com