☰

# Bulk Upload

Currently Uploading Credentials   Upload Assessments

Upload Learning Opportunity

# Select Your Organization:

Credential Engine.                                                        ⌄

### Credential Engine. Bulk Upload Tool

This page makes it easy to add and update Credentials and related information for Credential Engine. using spreadsheets. Carefully review the documentation and instructions below to construct the spreadsheet you need to use.

**Find Organization**      Type a name…

# Introduction

The Bulk Upload tool in the Credential Publisher allows you to quickly add or update Credential information in the Publisher by uploading it with a spreadsheet. This uploaded information will require your approval before Credential Engine will publish it to the Registry. You can use the Bulk Upload as a starting point and make additional changes to your data using the Publisher. You can also use the Bulk Upload tool to update existing data.

**Print This Page**
Expand the sections below that you want to print first!                    🖨

**Contact Us**
Get help with the Bulk Upload Tool                                         ✉

↑

Depending on whether you are uploading new Credentials
or updating existing Credentials, you will take the following
steps:

## Uploading New Credentials

1. Complete your organization information if you haven't
   already done so
2. Select the properties you want to include in a template
   spreadsheet, based on information available to you
3. Download the template spreadsheet and fill it with your
   data
4. Upload your data to the Publisher
5. Review and approve your uploaded data
6. Credential Engine will review approved data and
   publish it to the Registry

## Updating Existing Credentials

1. Download your existing Credential data, or generate a
   new spreadsheet containing your updated data (ensure
   your identifiers match the correct Credentials if you
   generate a new spreadsheet on your own!)
2. Update your data in the spreadsheet (if you
   downloaded it)
3. Upload your updated data to the Publisher
4. Review and (re-) approve your uploaded data
5. Credential Engine will review approved data and
   publish changes to the Registry

# Step 1: Complete Your Organization

If you have already published your organization to the Credential Registry and all of the addresses for your
organization are displayed below, skip to Step 2.

Otherwise, **click "My Organizations" to expand the section below** and use the Edit button below to
complete your organization's information. This is where you can add additional addresses for your
organization, so that you can reference those addresses in your uploaded spreadsheet's data. To add
addresses in the Publisher, click the Edit button, expand the "Location and Contact Information" section,
and click the "Add an Address" button. Once you have finished adding addresses, click the "Save"
button. When you are done, return here and **refresh** the page to see the addresses you added.

## My Organizations                                                                    ⌄

Addresses for your organization are listed below. To use these addresses in your upload spreadsheet, just include the address IDs as a pipe-separated | list of values.

**Credential Engine.**          Edit          **View Summary**          **View Details**

Status:       **Published**

CTID:         **ce-9bd8c615-9f3c-40e6-9c20-6d9f811844e6**

Addresses:

| External Identifier | Address ID | Address |
|---|---|---|
| Washington | 7556 | 1730 Rhode Island Ave, NW, Suite 212, Washington, District of Columbia 20036, United States |

**Bulk Upload Addresses**                                                                ⊙

# Step 2: Select Your Properties

The sections below list properties for Credentials, grouped by importance from required to optional. Your options will vary depending on whether you are uploading new Credentials or updating existing Credentials. Select the appropriate tab for more information.

Upload New Credentials    Update Existing Credentials

## Upload New Credentials

Select the properties below that you want to provide data for. The properties you select will be included as columns in a spreadsheet template in the next step.

**Note:** Required properties cannot be unselected.

**Handling Multiple Organizations**                                                      ⊙

**Required Properties**                                                                   ⊙

ⓘ  We recommend reviewing the credential type definitions to ensure that you've selected the most appropriate credential types. NOTE: The definition of "certification" includes the notions of "revocation" and "renewal", while "certificate" does not.

| Property | Description/Example | Special Data Requirements | Multiple Values? |
|---|---|---|---|

| | | | |
|---|---|---|---|
| **External Identifier** | Provide a unique (external) identifier from your system for the Credential that is used for your customers or for internal processes within your system. This identifier will be used on future uploads to ensure duplicate Credentials are not created. | Limit 50 characters. | Single |
| | *Example:*     `abc10012` | | |
| **Credential Name** | Use the official name of the credential. | | Single |
| | *Example:*     `Web Training Certificate` | | |
| **Credential Type** | The type of the credential | Select one of these values: | Single |
| | *Example:*     `Certificate` | Badge ⓘ | |
| | | Digital Badge ⓘ | |
| | | Open Badge ⓘ | |
| | | Certificate ⓘ | |
| | | Apprenticeship Certificate ⓘ | |
| | | Journeyman Certificate ⓘ | |
| | | Master Certificate ⓘ | |
| | | Certificate of Completion ⓘ | |
| | | Certification ⓘ | |
| | | Secondary School Diploma ⓘ | |
| | | General Education Development (GED) ⓘ | |
| | | Associate's Degree ⓘ | |
| | | Bachelor's Degree ⓘ | |
| | | Master's Degree ⓘ | |
| | | Doctoral Degree ⓘ | |
| | | Professional Doctorate Degree ⓘ | |
| | | Research Doctorate Degree ⓘ | |
| | | License ⓘ | |
| | | Micro-Credential ⓘ | |
| | | Quality Assurance Credential ⓘ | |
| **Description** | Use the description that is commonly used or already available on your website. | | Single |
| | *Example:*     `This certifies that someone is qualified as a web user.` | | ⬆ |
| **Subject Webpage** | The main, public webpage about this Credential. | Must be a properly formatted URL. Limit 600 characters. | Single |
| | *Example:*     `https://apps.credentialengine.org/resource/123` | | |

| Credential Status | The current status of the credential. For the initial upload, this would normally be "Active".<br><br>*Example:* `Active` | Select one of these values:<br> Active<br> Deprecated<br> Probationary<br> Suspended | Single |
| --- | --- | --- | --- |
| Language | The language(s) for this Credential.<br><br>*Example:* `english` | Must be a known language name. If there are multiple languages, use pipe-separated \| list of values. (english \| spanish). If no language is provided, the value of English will be stored. | Multiple |

## Recommended Benchmark Properties ⌄

| Property | Description/Example | Special Data Requirements | Multiple Values? |
| --- | --- | --- | --- |
| Available Online At | Online location where this Credential can be pursued.<br><br>*Example:* `https://apps.credentialengine.org/online/resource/123/begin` | Must be a properly formatted URL. Limit 600 characters. | Single |
| Availability Listing | A URL that lists locations where someone can go in-person to pursue this Credential.<br><br>*Example:* `https://apps.credentialengine.org/locationfinder` | Must be a properly formatted URL. Limit 600 characters. | Single |
| Available At | List of pointers to Physical location where the Credential can be pursued.<br><br>*Example:* `all or 123 \| 124 \| 125` | Use all to indicate that all of your organization's addresses apply, or use a pipe-separated \| list of Address IDs from Step 1 above.<br>**Note:** You should only use this property if you are adding Credentials, not if you are updating Credentials. | Multiple |
| Available At Codes | List of external identifiers used when uploading addresses for an organization. to Physical location where the Credential can be pursued.<br><br>*Example:* `all or 123 \| 124 \| 125` | Use all to indicate that all of your organization's addresses apply, or use a pipe-separated \| list of Address IDs from Step 1 above.<br>**Note:** You should only use this property if you are adding Credentials, not if you are updating Credentials. | Multiple |
| | | A pipe-separated \| | |

| Offered By | A CTID or Name and Webpage (separated by a tilde ~ ) of the organization(s) that offer this Credential. To indicate that your organization offers the Credential, you can use same as owner . This can be used in addition to identifiers for other organizations. | list of values, and tilde-separated ~ pairs of values. To indicate that your organization offers the Credential, use same as owner . **Note use consistent spelling:**The system searches for existing organizations based on the name and subject webpage. If there are variations in the name and subject webpage for the same organization duplicate organizations will be created. | Multiple |
|---|---|---|---|
| | *Example:* `organization name ~ http://organizationsite.com | same as owner` | | |
| Accredited By | A CTID or Name and Webpage (separated by a tilde ~ ) of the organization that accredits this Credential. Use the Find Quality Assurance Organizations Tool to help you fill out this data. | A pipe-separated | list of values, and tilde-separated ~ pairs of values. **Note use consistent spelling:**The system searches for existing organizations based on the name and subject webpage. If there are variations in the name and subject webpage for the same organization duplicate organizations will be created. | Multiple |
| | *Example:* `organization name ~ http://organizationsite.com | ce-8ca1ced1-a701-44a3-9820-564a7e28aa94` | | |
| Approved By | A CTID or Name and Webpage (separated by a tilde ~ ) of the organization that approves this Credential. Use the Find Quality Assurance Organizations Tool to help you fill out this data. | A pipe-separated | list of values, and tilde-separated ~ pairs of values. **Note use consistent spelling:**The system searches for existing organizations based on the name and subject webpage. If there are variations in the name and subject webpage for the same organization duplicate organizations will be created. | Multiple |
| | *Example:* `CredReg ~ https://credreg.net | Credential Engine ~ http://credentialengine.org` | | |
| Regulated By | A CTID or Name and Webpage (separated by a tilde ~ ) of the organization that regulates this Credential. Use the Find Quality Assurance Organizations Tool to help you fill out this data. | A pipe-separated | list of values, and tilde-separated ~ pairs of values. **Note use consistent spelling:**The system searches for existing organizations based | Multiple |
| | *Example:* `CredReg ~ https://credreg.net | Credential Engine ~ http://credentialengine.org` | | |

| | | | |
|---|---|---|---|
| | | organizations based on the name and subject webpage. If there are variations in the name and subject webpage for the same organization duplicate organizations will be created. | |
| **Recognized By** | A CTID or Name and Webpage (separated by a tilde ~ ) of the organization that recognizes this Credential. Use the Find Quality Assurance Organizations Tool to help you fill out this data. *Example:* `CredReg ~ https://credreg.net | Credential Engine ~ http://credentialengine.org` | A pipe-separated \| list of values, and tilde-separated ~ pairs of values. **Note use consistent spelling:**The system searches for existing organizations based on the name and subject webpage. If there are variations in the name and subject webpage for the same organization duplicate organizations will be created. | Multiple |
| **Date Effective** | The first date on which the Credential was offered *Example:* `12-07-2017` | Use MM/DD/YYYY or MM-DD-YYYY format. | Single |
| **Keywords** | Keywords (not whole sentences) that will help others find this Credential in searches. *Example:* `first keyword|another keyword|some text` | A pipe-separated \| list of values. Limit 200 characters per keyword. | Multiple |
| **Estimated Duration** | An estimate of how long it takes to complete this Credential. *Example:* `6 Months` | Enter one number and one time scale, e.g. "10 Hours" or "3 Years". Acceptable time scales are: Years Months Weeks Days Hours Minutes | Single |
| **Subjects** | A list of educational subjects related to this Credential. For CIP codes, include the code and title. *Example:* `Algebra|40.1001 Materials Science|40.9999 Physical Sciences|Geometry` | A pipe-separated \| list of values. Limit 200 characters per subject. | Multiple |
| **Audience Level Type** | The audience level for which the credential is intended. NOTE: Leave blank if for all audience level types. *Example:* `BeginnerLevel|SecondaryLevel` | A pipe-separated \| list of values: Beginner Level ⓘ Secondary School or Equivalent ⓘ | Multiple |

Intermediate Level ⓘ

Advanced Level ⓘ

Postsecondary Level ⓘ

Associates Degree Level ⓘ

Bachelors Degree Level ⓘ

Masters Degree Level ⓘ

Doctoral Degree Level ⓘ

| | | | |
|---|---|---|---|
| Industry Type | Names of industries to which this credential applies. If you want to provide the actual NAICS codes, use the next property: NAICS List. *Example:* `Welding\|Construction` | A pipe-separated \| list of values. Limit 200 characters per industry name. | Multiple |
| NAICS List | A list of NAICS codes. *Example:* `334519\|335991\|423860` | A pipe-separated \| list of values. | Multiple |
| Occupation Type | Names of occupations to which this credential applies. If you want to enter the actual O*Net codes, use the next property: O*Net List. *Example:* `Application Developer\|Software Engineer` | A pipe-separated \| list of values. Limit 200 characters per occupation name. | Multiple |
| O*NET List | A list of O*NET codes. *Example:* `25-9021.00\|25-1053.00\|25-1064.00` | A pipe-separated \| list of values. | Multiple |
| Renewal Frequency | Frequency with which the credential needs to be renewed. ONLY ONE FREQUENCY IS ALLOWED. *Example:* `2 Years` | Enter one number and one time scale, e.g. " 1 Year" or "3 Years". Acceptable time scales are: Years Months Weeks Days Hours Minutes | Single |

## Optional Properties ⊙

## Financial Assistance Properties ⬆

## Cost Properties ⊙

**Condition Properties** ❯

**Connection Properties** ❯

# Step 3: Download Your Template Spreadsheet

First, download a template spreadsheet based on the properties you selected above:

1. Check **Include Sample Data** to insert Sample Data for each column you have selected in the downloaded spreadsheet. This row should be deleted before uploading your data.

2. Check **Include instructions** to insert Description for each column selected in the downloaded spreadsheet.

☐ **Include Sample data**

☐ **Include Instructions**

**Download Template Spreadsheet**
Use this to upload *new* Credentials ⤓

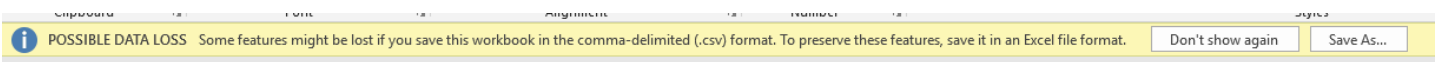# Step 4: Populate Your Template Spreadsheet

Now all you need to do is update the columns with the data about your Credentials. Here are some tips to keep in mind:

- **Save your data in Comma-Separated Value (.csv) format before uploading it.**
- Each row is a unique Credential.
- **Remove the sample row before uploading your data!**
- Each Credential **must** have a unique identifier.
  - Ideally, this should be the same identifier you use in your system.
  - If you don't have a unique identifier for Credentials, then sequentially number each row.
  - If you update your Credential data later, you will need to use the same identifier you used for the initial upload or the system will treat the record as new.
- **Do not** use the same identifier for two different Credentials, even if they are in separate spreadsheets or were uploaded in different batches.

- Columns that accept multiple values (such as keywords) can be entered by separating the values with a pipe character: `|`

  - Examples: `first keyword|second keyword|third keyword` **or** `first keyword | second keyword | third keyword`
  - Spaces on either side of the pipe `|` character are optional and will be ignored. Both examples above will yield identical results.
  - This character may share a key with the backslash `\` character, and may be located above the Enter key, depending on your keyboard layout.
  - On some keyboards, the pipe `|` character may look like this: `¦`
  - This is not a capital i. Note the difference: `I`  `|`

- Updates have some additional rules:

  - **Any value present in a cell will overwrite the value for that property for that Credential.** Ensure you do not unintentionally overwrite information!
  - The system will ignore empty cells. In order to leave the information for a property unchanged, simply leave the cell blank.
  - If you aren't updating any information for a property, you may leave that property's column out of the spreadsheet.
  - You must explicitly indicate when you want to delete something. In order to completely remove the information for a property for a Credential, use a value of #DELETE in that cell.
  - Information must still meet the minimum requirements (after all changes are applied) in order for an update to be successful. For example, you may update the description for a Credential, but you may not #DELETE its value.

**Excel Users:** You may see a warning like the one below. This is because the CSV file format does not save data about column widths, tabs, fonts, colors, formulas, and other formatting. We don't need this data, so you can safely ignore this warning.

| Clipboard | Font | Alignment | Number | Styles |
|---|---|---|---|---|

ⓘ POSSIBLE DATA LOSS   Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format.    [Don't show again]   [Save As...]

# Selecting a CTID for an Existing Artifact

Data properties such as target credentials can be provided in different formats, one of which is the CTID for an artifact that exists in the publisher system. You can use any of the existing search options to search for an artifact and then copy the CTID. NOTE: currently you can only see artifacts owned by organizations with which you are associated.

For example: If you would like to find the CTID for a credential:

- Navigate to the search page, and select Credentials (or use the menu option).
- Enter a filter for the target credential.
- The CTID (format: 'ce-' followed by a 36 digit UUID) will display below the Credential name in search results. There is a 'copy' icon to the right of the CTID. Clicking the icon will copy the CTID to the clipboard.

## B.A. in Behavioral Sciences

ce-d271e466-4ebd-4042-a038-597c9ba3184e  📋

- Paste the CTID into the appropriate column in the spreadsheet.
- The same approach may be used for Assessments and Learning Opportunities.

## Find Quality Assurance Organizations ⌄

You may find the following tool useful in providing QA organizations for properties such as "Accredited By", "Approved By", "Recognized By", and "Regulated By"

Use this tool to find the CTIDs of organizations that relate to your Credential data and format the value for a cell, such as "Accredited By".

Organization Name          Organization URL          Selected organizations:

[                    ]      [ http:// ]

# Step 5: Upload Your Data

Once you have filled out the data, save your spreadsheet as a **Comma-Separated Value (.csv)** file, and upload it here:

[ Choose File ] No file chosen                    Preview          Reset

# Step 6: Approve Your Credentials

Now that your data has been uploaded, visit the Organization Summary Page to review and approve it. Once your data has been approved, Credential Engine staff will be notified to give one final review of your data before it is published to the Credential Registry. If you need to make changes to a Credential, you can either edit Credentials individually via the manual editor, or upload your updates via spreadsheet. Click on the "Update Existing Credentials" button above to learn more.