



ComplianceWire[®]

Data Upload Tools

FOR UPLOADING DATA IN BULK

Rapidly Upload a Variety of Records to ComplianceWire

UL provides optional data tools that enable organizations to easily upload various types of records in bulk into ComplianceWire. These tools allow designated administrators within your organization to quickly upload CSV files containing large amounts of data (3,000 records per upload). The ease and convenience of our data upload tools also allow your organization to bypass the cost and time associated with facilitated uploads. For each of the suites below, the appropriate templates and instructions are provided to allow data uploads as described.

Here is a brief description of these tools:

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| User Records Upload Tool Suite | This suite of Data Upload templates enables you to upload users to the system, including the "Custom Fields" you may have defined in your configuration. In addition, this upload tool suite can be used to manage the Primary or Auxiliary Manager for Users in ComplianceWire. | Forms Upload Tool Suite | This suite of Data Upload templates enables you to add, edit or remove the elements associated to Forms. In addition, this set of templates will allow you to add or remove form response options from form elements. |
| Training Item Upload Tool Suite | This suite of Data Upload templates enables you to upload training items into the system and can include three training item types: control documents, instructor-led courses and forms. In addition, this upload tool suite also captures business rules (retraining date rules, etc.) and the online address location for each training item. The Update Training Codes Upload Template will allow you to change the training item code for one or all versions of a Training Item. | Curriculum Upload Tool Suite | This suite of Data Upload templates enables you to add, remove or edit curricula course associations to curricula. In addition, it allows you to add new curricula, add new versions of curricula or edit/remove curricula and to change the curriculum code for multiple curricula. |
| Completions (Scores) Upload Tool Suite | This suite of Data Upload templates enables you to upload completions related to existing training items in the system. In addition, this upload tool suite allows you to add information regarding the completion of specific training items for specific users and dates. | Recurring Assignments Upload Tool Suite | This suite of Data Upload templates enables you to add or remove recurring assignment records associated to curricula or training items. |
| User Group Upload Tool Suite | This suite of Data Upload templates enables you to upload User Groups into ComplianceWire. In addition, this set of templates will allow you to manage User Group data, User Group Criteria and User Group Membership. Also, the Update Group Name template is provided that will allow you to update User Group Names. | Quizzes Upload Tool Suite | This suite of Data Upload templates enables you to add or edit Quiz structure elements such as quiz status, or change the criteria for allowing feedback, pooling, setting time limits or indicating the maximum number of attempts. In addition, this set of templates will allow you to add, edit or remove Quiz Elements and their attributes such as question type, question text or correct response options. |
| | | Security Role Assignment Upload Tool Suite | This suite of Data Upload templates enables you to add or remove security role assignments to specific users that identify the Home Organization from where the data is restricted. |



Setting Up Security Rights for Tool Access

After UL Client Services has enabled your Upload Tools, you must then set up security rights for those administrators who will be able to use the tools. Only your Organization Administrator(s) (OrgAdmin) will be able to perform the following steps. UL Client Services can provide the name of these OrgAdmins to you if you do not already know who they are.

Please note: Any user who gains the right to use these tools will be able to modify the data type(s) they have been granted access to, regardless of the other security roles the user has in ComplianceWire.

Step 1. Click the **OPTIONS** tab, and then click the **MANAGE ACCESS TO SPECIAL TOOLS** link on the left side of the screen.

Note: If a user without the proper security rights visits the **MANAGE UPLOAD** menu item on the right and accepts the License Agreement terms, an "Access Denied" message will display.

Step 2. Click the specific **UPLOAD TOOL** link to begin. Each upload tool access is set up as a User Group and that access can be granted by adding users directly or by adding user group criteria.

Step 3. After adding a user either directly or via membership criteria, that user will now be able to click the **OPTIONS** tab, then the **MANAGE UPLOADS** link from the **GENERAL TOOLS** section to begin performing uploads.

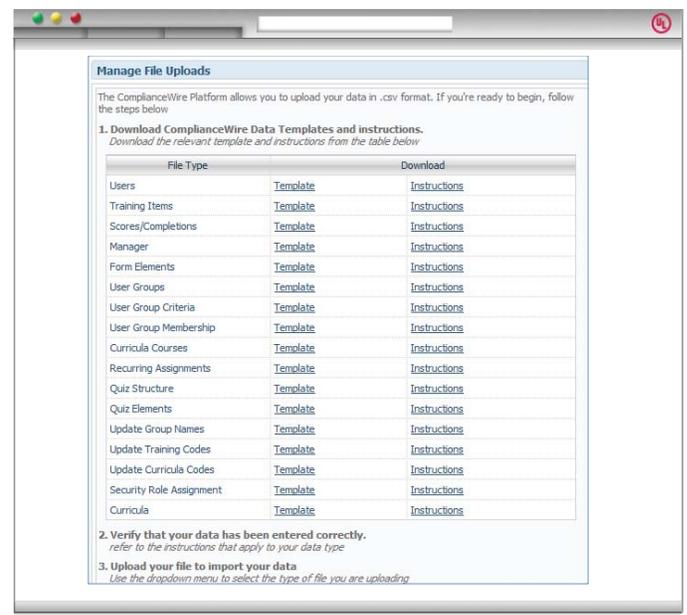
Using the Upload Tools

To begin, the administrator can test the upload tool in the client training site.

Step 1. The administrator with the proper security rights will click the **OPTIONS** tab and then the **MANAGE UPLOADS** link.

Note: If a user who hasn't been given access to any upload tools visits the **MANAGE UPLOAD** menu item and accepts the License Agreement terms, an "Access Denied" message will display.

Step 2. When the Manage Uploads screen displays, the administrator must click the **TEMPLATE** link for the type of data he or she wants to upload. The administrator can then populate the template with the data to be uploaded. Click the **INSTRUCTIONS** link for information on the required fields, descriptions of each field and exception messages with their descriptions.



Step 3. The administrator can then upload the CSV file. The upload process will display messages as the process moves forward. The administrator must click **APPROVE** at the final stage to complete the process.

Step 4. The system will display "File Successfully Uploaded" when the file has been uploaded. The CSV file will remain on the server for 14 days after it was uploaded.