

Tracking System: Bulk upload

Operational Guide

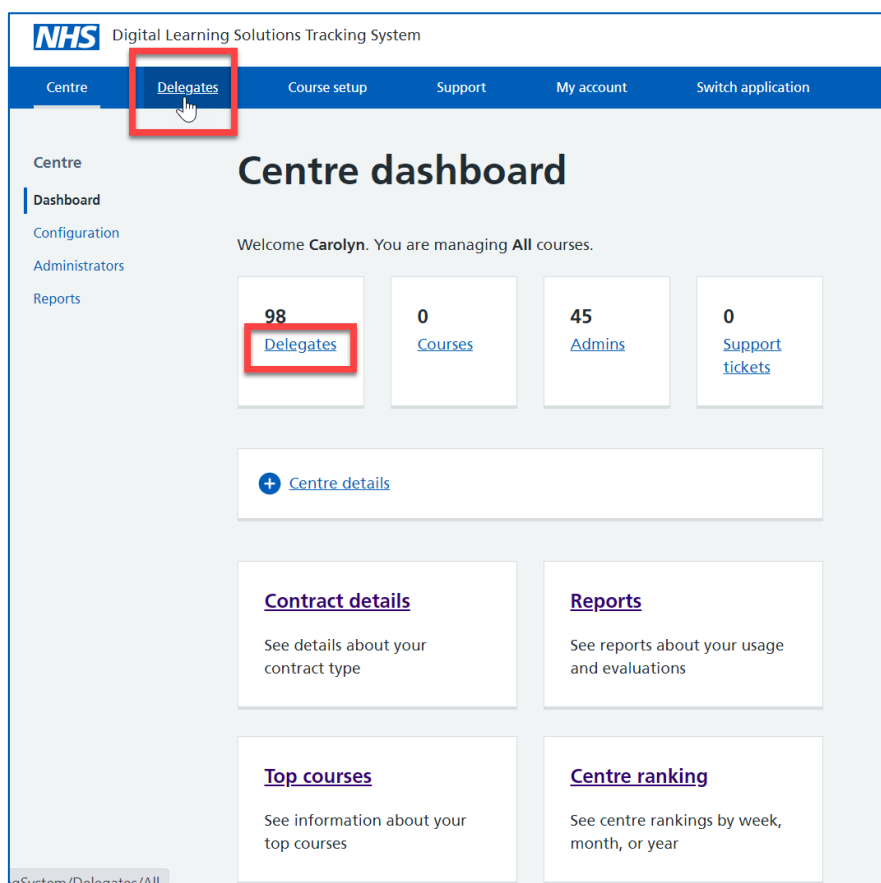
**Centre
Manager**

Administrator

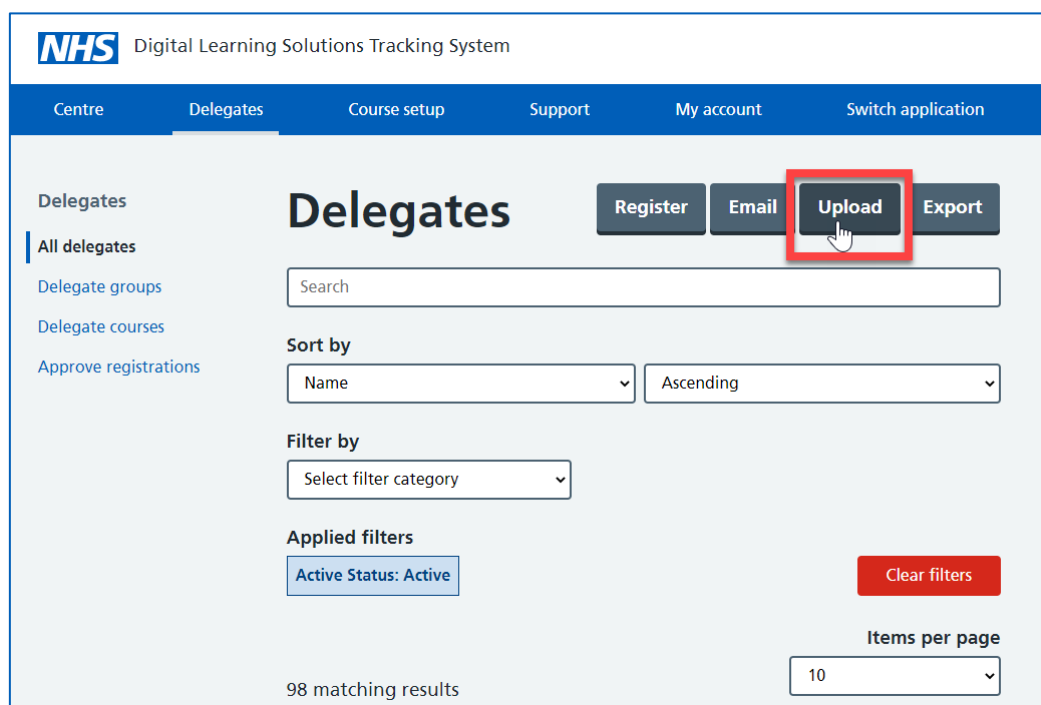
February 2022

Go to the Tracking System and bulk upload delegates

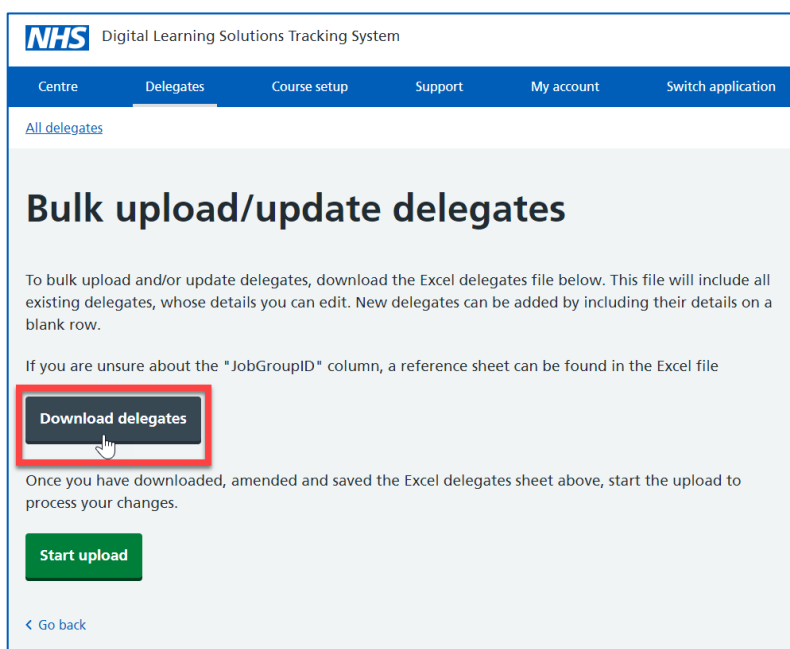
1. Select: Delegates



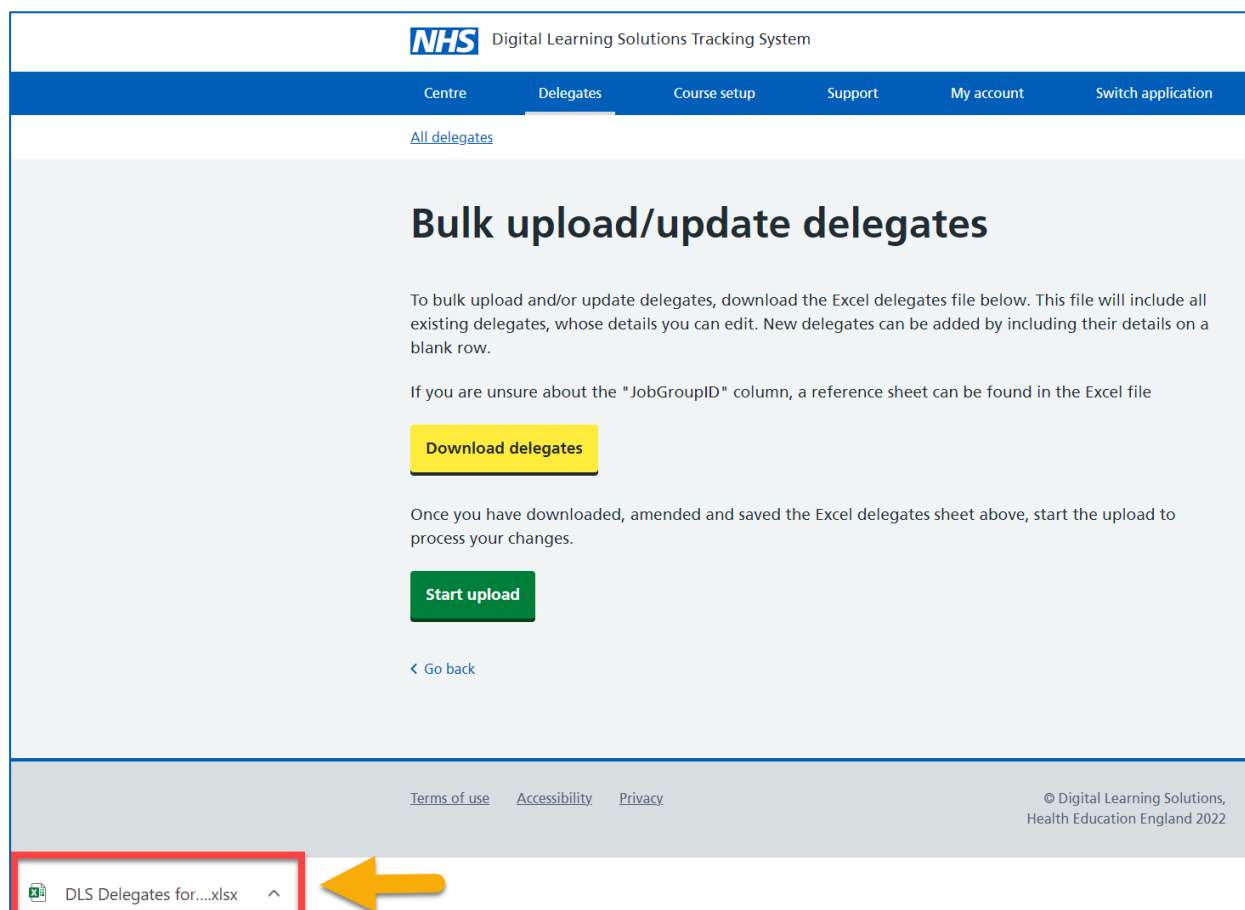
2. Select: Upload



3. Select: **Download delegates**

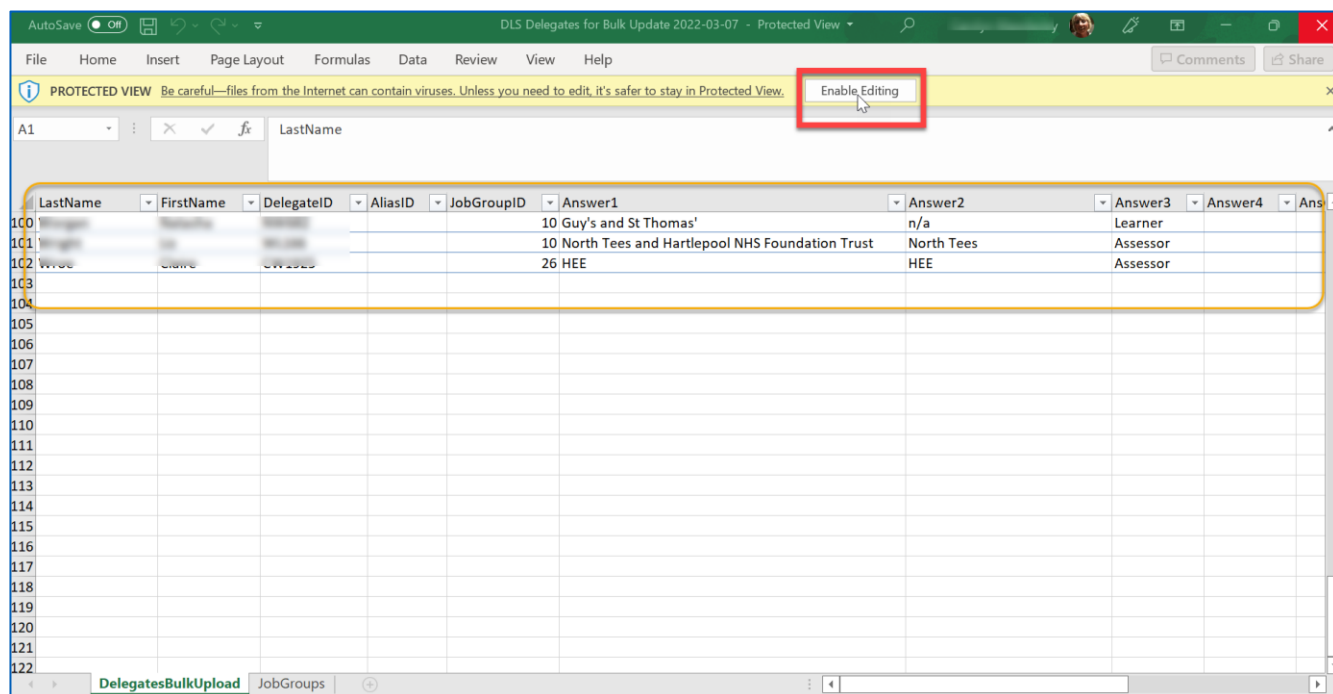


4. Select: the Excel download to open the spreadsheet

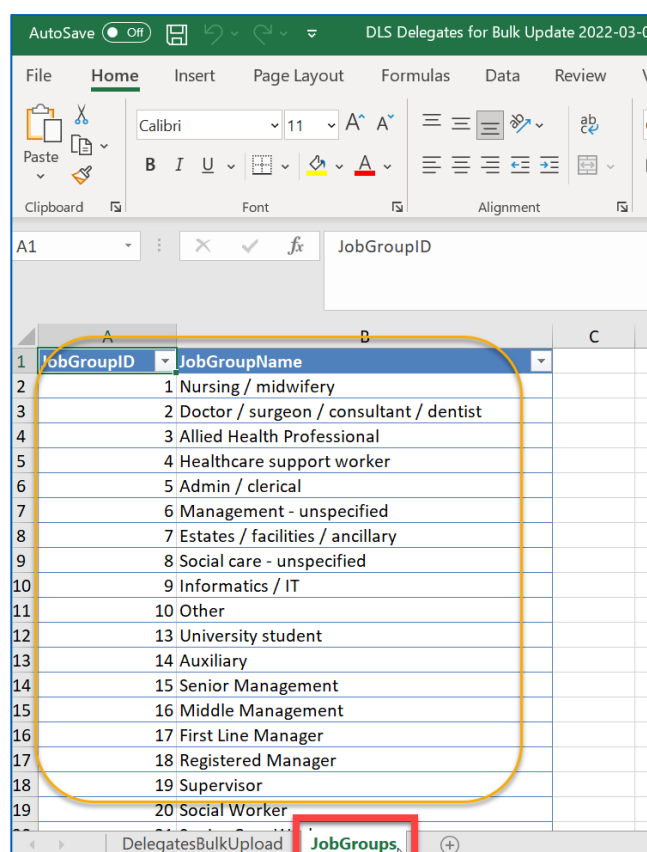


5. Select: Enable Editing

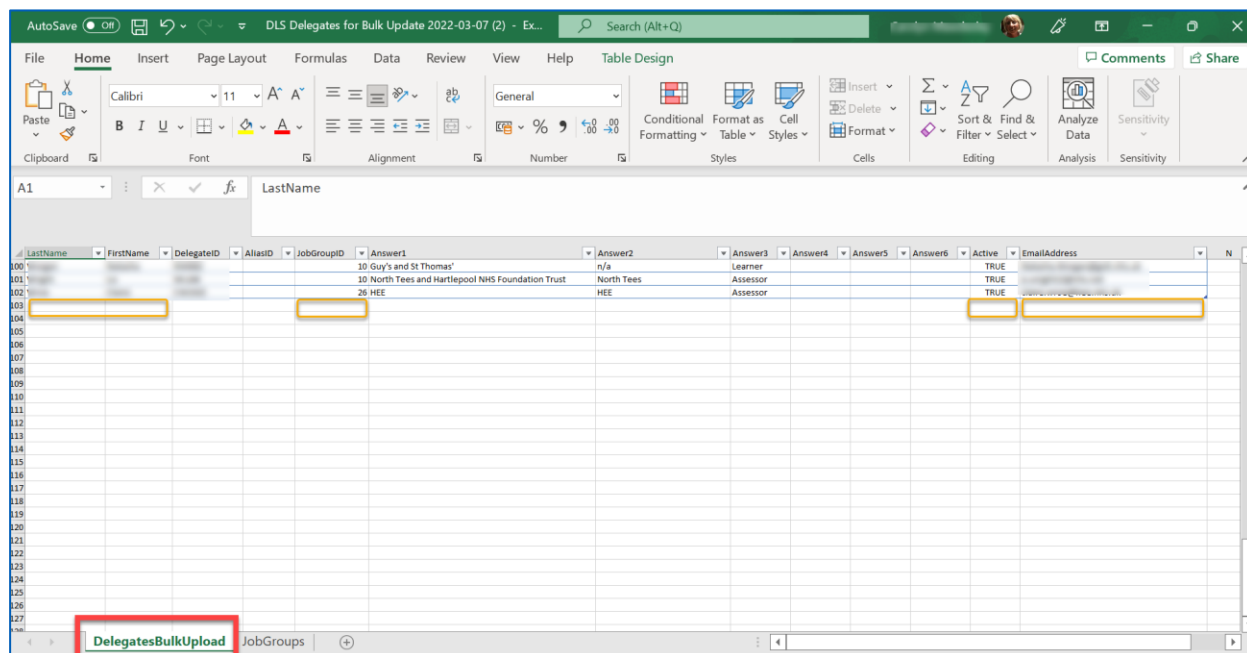
Please note, current registered delegates, will be listed in the Spreadsheet



6. Selecting the **Job Groups** tab will enable you to map the Job Group to the Job Group ID field



7. Select: Delegates Bulk Upload tab



8. The following fields are **mandatory** and must be completed:

- **LastName**
- **FirstName**
- **JobGroupID** must match an ID from the Job Groups workbook
- **Active** must contain either TRUE or FALSE usually TRUE
- Ensure that a unique **e-mail address** is provided for each delegate
- **Has PRN** (professional registration number) must contain either TRUE or FALSE. If set to TRUE a PRN will be required in the next field
- **PRN** Add a PRN if previous prompt is set to TRUE, can be left blank if previous field set to FALSE

9. **Optional** fields:

AliasID – Leave blank – this is no longer an active field.

Answer1-6 – if your centre has set up additional registration question prompts the answers can be recorded here

9. Add all the new delegates then **Save** (locally) and close the spreadsheet

	A	B	C	D	E	F	G	H	I	J	K	L	M
	LastName	FirstName	DelegateID	AliasID	JobGroupID	Answer1	Answer2	Answer3	Answer4	Answer5	Answer6	Active	EmailAddress
100	Worgan	Natasha	NW682		10	Guy's and St Thomas'	n/a	Learner				TRUE	Natasha.Worgan@gstt.nhs.uk
101	Wright	Liz	WL166		10	North Tees and Hartlepool NHS Foundation Trust	North Tees	Assessor				TRUE	e.wright13@nhs.net
102	Wright	Claira	CW1925		10	HEE	HEE	Assessor				TRUE	claira.wright@nhs.uk
103	Testing	Test			10	HEE	HEE	Learner				TRUE	test.testing@catmail.com

Return to DLS

10. Select: **Start upload**

Digital Learning Solutions Tracking System

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[My account](#)
[Switch application](#)

[All delegates](#)

Bulk upload/update delegates

To bulk upload and/or update delegates, download the Excel delegates file below. This file will include all existing delegates, whose details you can edit. New delegates can be added by including their details on a blank row.

If you are unsure about the "JobGroupID" column, a reference sheet can be found in the Excel file

Download delegates

Once you have downloaded, amended and saved the Excel delegates sheet above, start the upload to process your changes.

Start upload

Go back

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Bulk upload/update delegates

☐ Send welcome email to registered delegate

File with updated information

No file chosen

[X Cancel](#)

11. Select: **Send welcome email to registered delegates** (recommended).
For Information: The email will include a link inviting your delegates to set a password for their account. If you choose not to send a welcome email at this stage, you will need to access each individual learner record in your bulk upload to either, set a password on behalf of the delegate, or send individual welcome emails.

12. Select: **Choose file** (the spreadsheet with your new delegate registrations)

13. When the spreadsheet has been chosen

14. Select: **Upload and process**

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Bulk upload/update delegates

☐ Send welcome email to registered delegate

File with updated information

DLS Delegates for ...ate 2022-03-07.xlsx

[X Cancel](#)

15. The bulk upload is complete and a summary of results is displayed on screen

16. Select: **Manage all delegates**

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Bulk upload complete

Summary of results:

- 102 lines processed
- 1 new delegate registered
- 0 delegate records updated
- 101 delegate records skipped (no changes)
- 0 lines skipped due to errors

[Manage all delegates](#)

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Delegates

Register Email Upload Export

test

Sort by
Name Ascending

Filter by
Select filter category

Applied filters
Active Status: Active Clear filters

Items per page
10

1 matching result

+ Testing, Test (TT813)

17. You will be returned to **Delegates** where you can view the new delegate registrations