**Import Activities via Excel File**

**January 2015**

Document Information

# Design – Import activities

* 1. The allows creating activities using excel file/ XML.
  2. The file will include the following:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| M  (Mandatory) | Property name | | Type | Description | | Comments |
| V | Action | | Nvarchar (2) | A-Add or Update  D-Delete | | AO (adds only) is not relevant in import excel file. |
| V | Name | | Nvarchar (250) | Defines the activity's name | |  |
| V | UniqueName | | Nvarchar(50) | Defines the external activity identifier | | Alternative to  ActivityExternalID |
| V | ActivityExternalID | | Int | Defines the external activity identifier | |  |
| V | EvaluationMethod | | Int | Defines the evaluation methods of the activity:  Exam = 0  Assessment Form = 1  Manager Status = 2  User Status = 3  Activity Access = 4  Grade = 5  External Courseware = 7 (SCORM)  Attendance = 8  None = -1 | |  |
|  | RelatedItemExternalID  (RelatedItemUniqueName) | | Nvarchar (50) | Defines the related item's external ID. (e.g Test, Assessment form) | | In the excel, this should be  RelatedItemExternalID |
|  | EvaluationToolExternalID  (EvaluationToolUniqueName) | | Nvarchar (50) | Defines the related objectives external ID. (relevant for objectives evaluation method only) | | In the excel, this should be  EvaluationToolUniqueName |
|  | StudentFeedbackExternalID  (ItemFeedbackUniqueName) | | Nvarchar (50) | Defines the related item's external ID. (Feedback form) | | In the excel, StudentFeedbackExternalID |
|  | ManagerFeedbackExternalID  (ManagerFeedbackUniqueName) | | Nvarchar (50) | | Define the related items external ID. (Feedback form) | In the excel,  ManagerFeedbackExternalID |
|  | StudentFeedbackAnonymous | | Boolean | | Define whether the activity feedback is anonymous  0= False  1= True |  |
|  | IsDaily | | Boolean | Defines whether the activity's event is daily  0= False  1= True | |  |
| V | Duration | | Int | Defines the activity's duration in minutes.  If IsDaily = 1 then the activity duration will be in days. | |  |
|  | TrainingDuration | | Int | Defines the activity's training duration in minutes. | |  |
|  | SubjectId | | Int | Defines the subject id. | | If the value is empty the activity will be imported under the primary subject of the entity. |
|  | RelatedEntityExternalID  (CourseExternalId) | | Nvarchar (50) | Define the external ID of the entity the activity is located in | | In the excel, this should be RelatedEntityExternalID |
| V | RelatedEntityType  (EntityType) | | Int | Defines the entity type to which the activity is imported: Training Program=3  Master Plan=4  Activity And Content Repository=15 | | In the excel, this should be RelatedEntityType |
|  | GradeCalculationMethodType | | Int | Defines the activity grading  method:  Highest performance = 6 (Default)  Average grade = 1  Last completed performance = 7 | | Depend on the evaluation method selected |
|  | PassingGrade | | Decimal | Defines the activity's passing grade | | Depend on the evaluation method selected |
|  | SatisfactoryGrade  (HighGradeMinimum) | | Decimal | Defines the activity's minimum grade | | Depend on the evaluation method selected.  In the excel, this should be SatisfactoryGrade |
|  |  | |  |  | |  |
|  | Description | | Nvarchar (1000) | Defines the activity's description | |  |
|  | IsQualifying | | Int | Defines whether the activity is qualifying:  0=Not Qualifying  1 = Qualifying | |  |
|  | DisplayGradeToUser | | Int | Defines whether the activity's grade is displayed to the user: 0= Hide grade  1 = Display grade | |  |
|  | DisplayWeightToUser | | Int | Defines whether the activity's weight is displayed to the user: 0= Hide weight  1 = Display weight | |  |
|  | DisplayToUser | | Int | Defines whether the activity is displayed to the user:  0= Hide weight  1 = Display weight | |  |
|  | | TargetAudience | Int | | Defines who the activity is targeted at :  All Users = 0  Assigned Users = 1 | Take the default value from SC / value presented in the system. |
|  | AutoAssignUsers | | Boolean | Defines whether all registered participants assign automatically once the activity has been scheduled:  0= False  1= True.  Relevant while ParticipantQuotaDefinition = "No Limit") | |  |
|  | ParticipantQuotaDefinition  (QtyUsersType) | | Int | Define the users' amount for the activity:  RecommendedNumber (GeneralLimit) = 0  SingleUser = 2  NoLimit = 4  ParticipantPerPosition = 5 (NEW) | | In the excel, this should be ParticipantQuotaDefinition |
|  | TrainingPositionExternalIDs | | Nvarchar (50) | Defines the related training position's external ID.  Relevant if ParticipantQuotaDefinition = 4/5 | | In case of multiple positions the value should be a comma separate strings of the External IDs. |
|  | ParticipantQuota  (QtyUsers) | | Int | Defines the activity's quota. In case ParticipantQuotaDefinition  = 0 then must add number of users that assigned to the activity | | In the excel, this should be ParticipantQuota |
|  | LongDescription | | Nvarchar (4000) | Administrative Notes? | |  |
|  | IsContinuous | | Boolean | Defines whether the activity's event is continuous  0= False  1= True | |  |
|  | CategoryID | | Int | Defines which category the event is related to | |  |
|  | ShowAs | | Int | Defines which category the event is related to  0 = Event  1 = Task  2 = Header | | Take the default value from SC / value presented in the system. |
|  | AvailabilityStatus | | Int | Defines whether the event is available or not:  1 = Free  2 = Busy | | Take the default value from SC / value presented in the system. |
|  | SyncWithExternalCalendars  (SyncExternal)  (Enhancements) | | Int | Defines whether the event is sync  0 = Do Not Sync  1 = Sync All Recipients  3 = Participants Only  4 = Resource Only | | According to SC parameter.  In the excel, this should be SyncWithExternalCalendars |
|  | IsFixed | | Boolean | Defines whether the activity’s event is fixed  0= False  1= True | |  |
|  | AllowEvaluatingByOUManager  (AllowExecutionEdit) | | Boolean | Defines whether the OU manager sets as an evaluator (Relevant when evaluation method: Assessment Form, Manager Status, Attendance, Grade) | | In the excel, AllowEvaluatingByOUManager |
|  | IsExemptionAllowed | | Boolean | Defines whether the participant can be exempted according this activity  0= False  1= True | |  |
|  | RepeatTestOptions  (NEW) | | Int | Defines the repeat test options in case that evaluation method is test:  0 = Never  1 = Upon failure - one additional try  2 = Any grade – one additional try  3 = Any grade – multiple tries | | Take the default value from SC / value presented in the system. |
|  | RepeatTestEvaluationTool  (NEW) | |  | Defines the related test external ID (Not relevant if RepeatTestOptions =0) | |  |
|  | RepeatTestGrade  (NEW) | |  | Defines the grade calculation for the tests  (Not relevant when RepeatTestOptions = 0)  0 = Weighted grade (Relevant if RepeatTestOptions = 1 or 2 selected)  1 = Highest grade (Relevant if RepeatTestOptions = 1/ 2 / 3 selected)  2 = Last execution (Relevant if RepeatTestOptions = 3 selected) | |  |
|  | RepeatTestWeightedGrade  (NEW) | |  | Defines the grade calculation by weight for the tests that their RepeatTestOptions is = 1 or 2 | | Enter number between 0-100 |
|  | DenyParticipantsAccess  (NEW) | | Boolean | Define if the participant can enter the test or not  0 = False (Default)  1 = True | |  |
|  | | AdministrativeNotes | Nvarchar (3000) | | Define the activity's Administrative Notes |  |
|  | | SchedulingTimeFrame  (NEW) | Int | | Defines the activity’s time frame schedulaing   1. Phase 2. Specific Time Range |  |
|  | | PhaseInternalID  (NEW) | Int | | Defines the phase InternalID  in case TimeFrameScheduling= 1 |  |
|  | | SchedulingTimeFrame\_StartDate  (NEW) | Datetime | | Defines the phase start date.  Relevant if TimeFrameScheduling= 2 |  |
|  | | SchedulingTimeFrame\_EndDate |  | | Defines the phase End date.  Relevant if TimeFrameScheduling= 2 |  |
|  | | Approve after update  (NEW) | Boolean | | True (1) - Set the activity to baseline after the action.  False (0) - Set the activity to development status.  (Default = False) | Relevant only for importing to ACR without approval process. |
| One of these properties is required | | MetadataTypeId | Int | | Defines the activity's metadata type as it appears in the activity types section in the system configurations. |  |
| MetadataExtenalID | Int | | Activity MD by external ID | If the MetadataTypeId is null, use this value |
|  | | Property  [External ID] |  | | A column named according to the External ID of the relevant properties for each type, the value inside represent the value of the property to set.  In case of a multiple select property the value should be a comma separate strings of the External IDs of the required selected options. |  |
|  | | Property  [External ID] |  | |  |  |
|  | | Property  [External ID] |  | |  |  |
|  | | Property  [External ID] |  | |  |  |

* 1. **The log file structure:**

|  |  |  |
| --- | --- | --- |
| Action Date | Action | Example |
| Import Start Time | Import has started | “Activities import process started” |
| Import Errors | * Completed Successfully * Completed with Errors * Failed   If the import failed, present the reason: incorrect file format, corrupted file, etc. | “The import of the activity has failed - …”  (See errors section 3.4) |
| Import Status | Number of successful / unsuccessful imports. | “The import process has completed.  0 activities out of 1 were completed with no critical errors.” |
| Import End Time | Import has ended | “Activities import process ended” |

* 1. **Possible Errors**

|  |  |  |
| --- | --- | --- |
| Case | Alert | Comments |
| Subject ID does not exist in course plan. | The import has failed for activity [UniqueName /ActivityExternalID] - Subject ID does not exist in [TPExternalID]. | It’s not error if the value is empty. |
| Activity unique name does not exist or missing.  Activity external ID does not exist or missing. | The import has failed for activity [activity name] – Activity external ID does not exist or is missing.  Error while trying to delete activity [activity name] - Activity external ID does not exist or is missing. | Action will be failed for this activity. |
| Activity external ID already exists  If the SaveActivityUniqueName = true and activity UniqueName exists | The external ID already exists for activity [UniqueName /ActivityExternalID] – The activity’s properties were updated. | Update the current activity |
| Related entity type does not exist or missing | The import has failed for activity [UniqueName /ActivityExternalID] - Related entity type does not exist or is missing.  Error while trying to delete activity [UniqueName /ActivityExternalID] – Related entity type does not exist or is missing. | Action will be failed for this activity. |
| Related entity external ID  does not exist or missing | The import has failed for activity [UniqueName /ActivityExternalID] – Related entity external ID does not exist or is missing. | Action will be failed for this activity. |
| Evaluation method value does not exist or missing | The import has failed for activity [UniqueName /ActivityExternalID] - Evaluation method does not exist or is missing. | Action will be failed for this activity. |
| Related item external ID  does not exist or missing | The import has failed for activity [UniqueName /ActivityExternalID] - Related item external ID does not exist or is missing. | Action will be failed for this activity. |
| Evaluation item does not matched to evaluation method selected | The import has failed for activity [UniqueName /ActivityExternalID] - Evaluation item does not match the evaluation method selected. | Action will be failed for this activity. |
| Student feedback external ID is invalid | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] - Student feedback external ID is invalid. | Import succeeded,  Activity will be imported with an empty value |
| Manager feedback external ID is invalid | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] - Manager feedback external ID is invalid. | Import succeeded,  Activity will be imported with an empty value |
| Evaluation tool external ID does not exist or missing | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] - Evaluation tool external ID does not exist or is missing | Import succeeded,  Activity will be imported with an empty value |
| Target audience value is invalid | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] - Target audience value is invalid. | Import succeeded,  Activity will be imported with an empty value |
| Satisfactory grade is not between 0 and 100 | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] - Satisfactory grade should be between 0 and 100. | Import succeeded,  Activity will be imported with an empty value |
| Satisfactory grade value is invalid | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] - Satisfactory grade is invalid. | Import succeeded,  Activity will be imported with an empty value |
| Description length is too long | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] - Description length is too long, maximum length for description is [maximum length]. | Import succeeded,  Activity will be imported with an empty value |
| Passing grade is not relevant for the evaluation method selected. | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] – Passing grade is not relevant for the evaluation method selected. | Import succeeded,  Activity will be imported with an empty value |
| Passing grade value is invalid | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] - Passing grade is invalid or passing grade should be between 0 and 100. | Import succeeded,  Activity will be imported with an empty value |
| Grade calculation method type value is invalid | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] - Grade calculation method type value is invalid. | Import succeeded,  Activity will be imported with an empty value |
| Long description length is too long | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] – Long description length is too long, maximum length for long description is [maximum length]. | Import succeeded,  Activity will be imported with an empty value |
| Category ID does not exist. | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] – Category ID does not exist. | Import succeeded,  Activity will be imported with an empty value |
| Training positions does not exist or missing in the course. | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] - Training positions does not exist or is missing in [TP name]. | Import succeeded,  Activity will be imported with an empty value |
| Activity mate data type does not exist or missing | The import has failed for activity [UniqueName /ActivityExternalID] – Activity meta data type does not exist or is missing. | Action will be failed for this activity. |
| Activity meta data properties don’t exist nor has invalid values. | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] – Activity meta data properties don’t exist or are invalid. | Import succeeded,  But without the meta data properties |
| Import mandatory meta data | The import has failed for activity [UniqueName /ActivityExternalID] – Activity meta data properties don’t exist or are invalid. | Action will be failed for this activity. |
| The user does not have permission to create / update / delete activities. | The import of the activity [UniqueName /ActivityExternalID] has failed due to missing permissions. | Action will be failed for this activity. |
| Delete activity with scheduled events | Can’t delete the activity [UniqueName /ActivityExternalID] due to scheduled events. | Action will be failed for this activity. |
| Update / delete activity in status baseline | The import has failed for activity [UniqueName /ActivityExternalID] - The activity is set to status baseline, therefore it couldn't be updated.  Error while trying to delete activity [UniqueName /ActivityExternalID] - The activity is set to status baseline, therefore it couldn't be deleted. | Action will be failed for this activity. |
| Update / delete activity in MP in status baseline | The import has failed for activity [UniqueName /ActivityExternalID] - The master plan is set to status baseline, therefore the activity couldn't be updated.  Error while trying to delete activity [UniqueName /ActivityExternalID] - The master plan is set to status baseline, therefore the activity couldn't be deleted. | Action will be failed for this activity. |
| If evaluation method is not test and repeat test properties was entered | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] – Repeat test properties are not relevant to the evaluation method. | Import succeeded,  Activity will be imported without these properties. |
| Repeat test options are not matched to grade options. | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] – Repeat test options do not match the grade options. | Import succeeded,  Activity will be imported with an empty value |
| Repeat test weighted grade is not between 0-100 | The import has succeeded with errors for activity [UniqueName /ActivityExternalID] – Repeat test weighted grade should be between 0 - 100 | Import succeeded,  Activity will be imported  Over 100 it should imported as 100 under 0 it should imported as 0. / Activity will be imported with an empty value |

# Design – Import Activities' Resource Requirements

* 1. The system will allow import resource requirements for activities using excel file/ XML.
  2. The file will include the following:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| M  (Mandatory) | Property name | Type | Description | Comments |
| V | Action | Nvarchar  (1) | A- Add or Update  D-Delete |  |
| V | ActivityExternalID  (ActivityUniqueName) | Nvarchar (50) | Defines the activity's external ID | In the excel, ActivityExternalID |
| V | ResourceTypeId | Int | Defines the resources type ID |  |
|  | Quantity  (Qty) | Int | Defines the resource requirement quantity | In the excel, Quantity |
|  | RequirementTitle  (NEW) | Nvarchar(50) | Define the resource requirement title |  |
|  | PositionID | Int | Defines the resource position's ID |  |
|  | AllocationStartFrom | Int | Used to set the start time of allocation:  Start = 0  End = 1  Default values: 0 |  |
|  | AllocationStartDelta | Int | Used to determine when to set the start time of allocation:  The value can be negative/positive/zero. Default values: 0 |  |
|  | AllocationEndFrom | Int | Used to determine when to set the end time of allocation:  Start = 0  End = 1.  Default values: 1 |  |
|  | AllocationEndDelta | Int | Used to determine when to set the end time of allocation:  The value can be negative/positive /zero. Default values: 0 |  |
|  | IsMandatory  (IsObligatory) | Int | Defines whether the resource is obligatory or not:  0= False  1= True | In the excel, IsMandatory  Take default from SC |
|  | SetAsLocationOrContanct  (IncludeNameToEvent) | Boolean | Defines whether the resource is used as contact or location:  0= False  1= True | In the excel, SetAsLocationOrContanct  Take default from SC |
|  | SetAsEvaluator | Boolean | Defines whether the resource is evaluator.  0 = False  1 = True | Take default from SC |
|  | Remark | Nvarchar (1000) | Defines the resource's remarks |  |
|  | Property [ExternalID] Value |  | Allow to type the relevant values:  **Text** – text  **Number** – single or 2 numbers separated by commas (for range)  **Date** – single or 2 dates separated by commas (for range).  **List** – list of optionsIDs comma separated.  **Boolean** – 0/1 |  |
|  | Property [ExternalID] Operator | Int | 0 – equal  1 – greater than or equal to  2 – less than or equal to  3 – between  4 – grater then event date  5 – Any checked  6 – All checked  7 – not required (Default) |  |
|  | Property [ExternalID] Mandatory |  | 0/1 | Take the default from the resource type |
|  | Certifications [ExternalID] mandatory |  | Allow defining the relevant certifications and to define if this requirement is mandatory or not.  0/1 | Take the default from the resource type |

* 1. **Possible Errors**

|  |  |  |
| --- | --- | --- |
| Case | Alert | Comments |
| Activity external ID does not exist or missing | Resource requirement import has failed for activity [ActivityExternalID]  - Activity does not exist or is missing. | Action will be failed for this activity. |
| Remove resource requirement from activity that does not exist or missing | Error while trying to remove resource requirement from activity [activity name] - Activity does not exist or is missing.  Error while trying to remove resource requirement from activity [ActivityExternalID] - Activity does not exist or is missing. | Action will be failed for this activity. |
| Resource requirement type does not exist or missing | Resource requirement import has failed for activity [ActivityExternalID] - Resource requirement type does not exist or is missing.  Error while trying to remove resource requirement from activity [ActivityExternalID] - Resource requirement type does not exist or is missing. | Action will be failed for this activity. |
| Position ID does not exist or missing | Resource requirement import has succeeded with errors for activity [ActivityExternalID] - Position does not exist or is missing. | Import succeeded,  Activity will be imported with an empty value |
| Allocation time is not valid | Resource requirement import has failed for activity [ActivityExternalID] - Allocation time is not valid. | Action will be failed for this activity. |
| Operator property does not matched to the property value | Resource requirement import has failed for activity [ActivityExternalID] – Operator property does not match the property value. | Action will be failed for this activity. |
| Operator value is list that sets as single selection, but multiple values were entered. | Resource requirement import has failed for activity [ActivityExternalID] – Multiple values were entered for a single selection list. | Action will be failed for this activity. |
| Set property as mandatory  For property that is not required | Resource requirement import has succeeded with errors for activity [ActivityExternalID] – The property is not required. | Import succeeded,  Without these properties. |