

## Creating Accounts and Test Registrations Using Batch Load

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### In this document

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This document contains information used by site administrators to create WorkKeys Internet Version accounts and test registrations for multiple examinees using batch load.

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### When to use this document

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Use this document when you need to create multiple examinee accounts and add test registrations to those accounts.

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### General Information

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**IMPORTANT – Please note the following before you begin:**

1. If you are using batch load for multiple examinees or for a group of examinees that you will test at the same time, we recommend that you use the “Groups” feature. The group(s) that you create will be assigned an ID number. You must include this ID number on the batch load Header File in the “groupID” column for each examinee listing. Please note that the “groupID” column in the Header File will not appear until after a group is created in your realm.

Using groups gives you the option to add tests to a group and authorize by group rather than by individual. For more information about creating and using groups, see the Quick Start Guides at [www.act.org/workkeys-private/reference/](http://www.act.org/workkeys-private/reference/).

2. Batch loads that include groups may contain up to 100 records. Batch loads that do NOT include groups may contain up to 200 records.
3. Since the Invalid Rows File and the Log File contain Personally Identifiable Information (PII), they are both encrypted. To open the files, you will need WinZip or 7-Zip (a free program you can download off the Internet).

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### Process overview

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The following table shows the process for creating WorkKeys Internet Version accounts and test registrations for multiple examinees using batch load.

Stage	Description
1	Download the batch load Header File (spreadsheet).
2	Complete the necessary information.
3	Upload the spreadsheet into Validus.
4	Access the Invalid Rows File and the Log File.

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Procedure: Downloading the Batch Load Header File

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Follow the steps below to download the batch load Header File. (Please note that some of the screen shots may look slightly different from what is shown in this Quick Start Guide.)

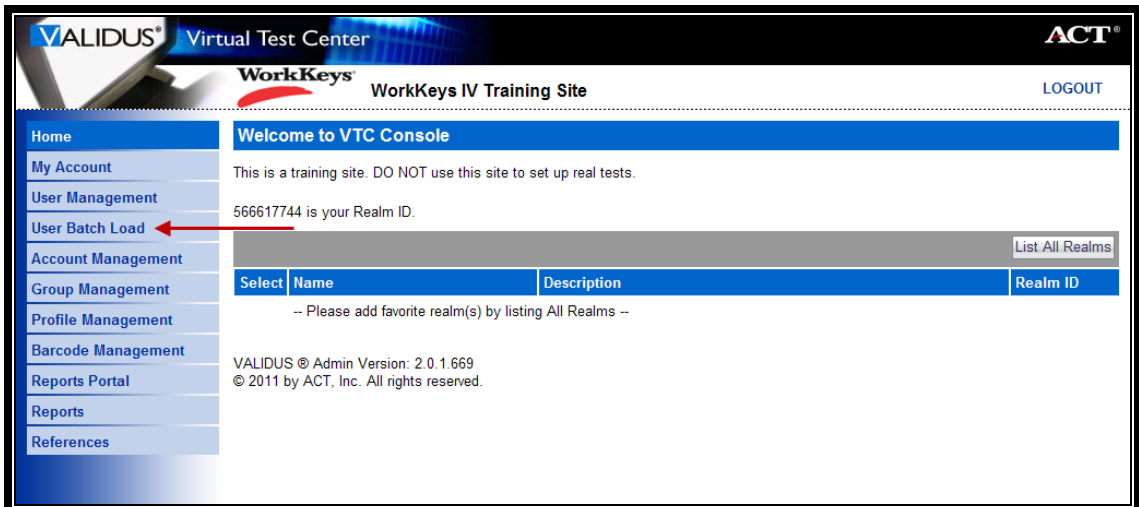
1. Log in to the Validus VTC (Virtual Test Center) system with your User ID and password. The URL will look similar to the ones shown below. If a login page with a realm drop-down menu appears, you will need to enter your URL again. Only space for a User ID and a password should appear.

[vtc.act.org/<your site's realm number>](http://vtc.act.org/<your site's realm number>)

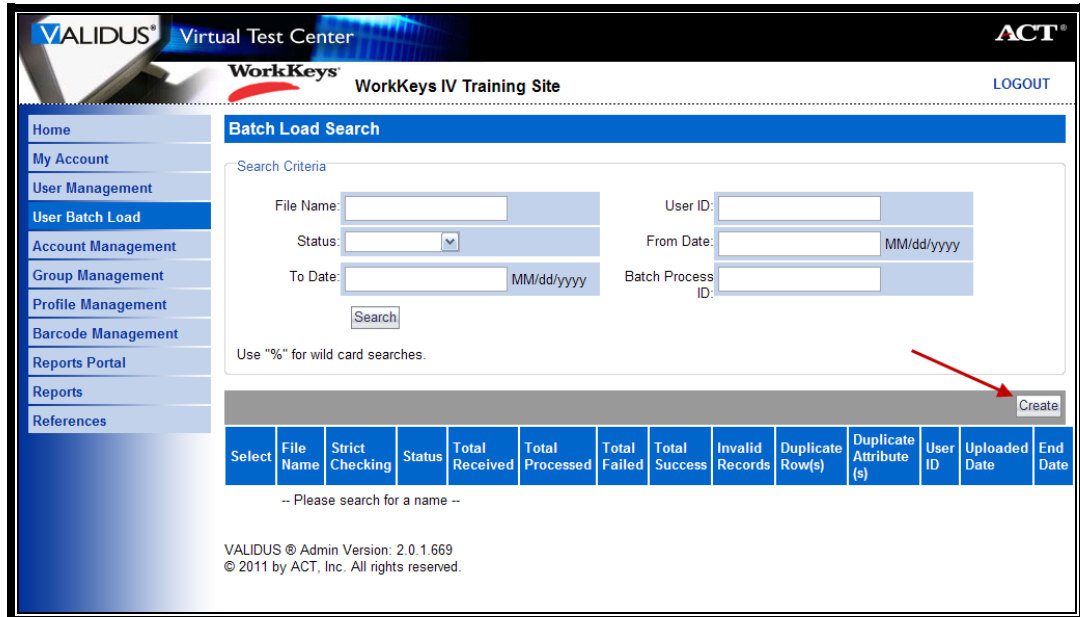
e.g., [vtc.act.org/123456789](http://vtc.act.org/123456789)



2. On the left side of the page, click on **User Batch Load**.

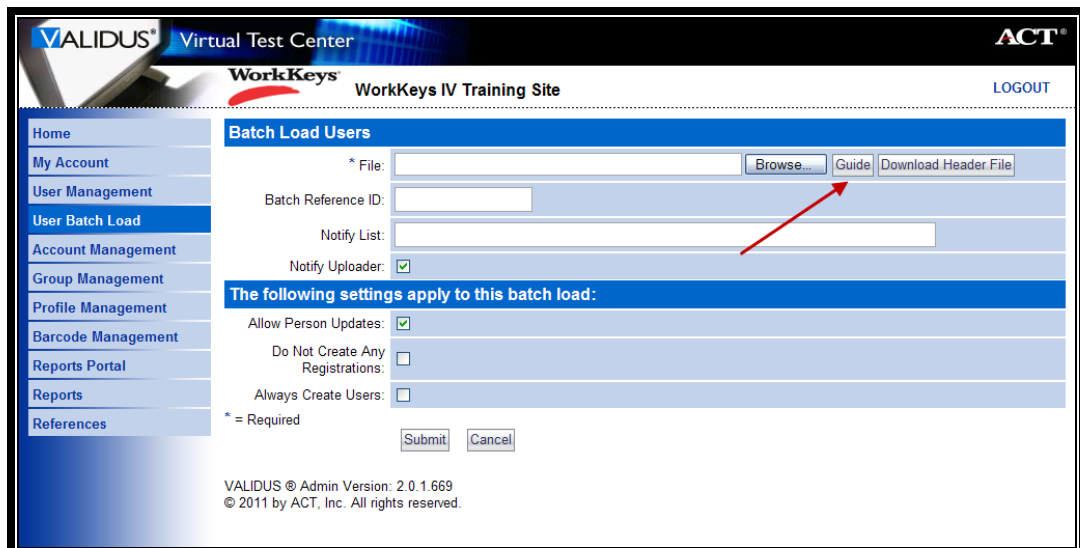


- On the right side of the page, click the **Create** button.

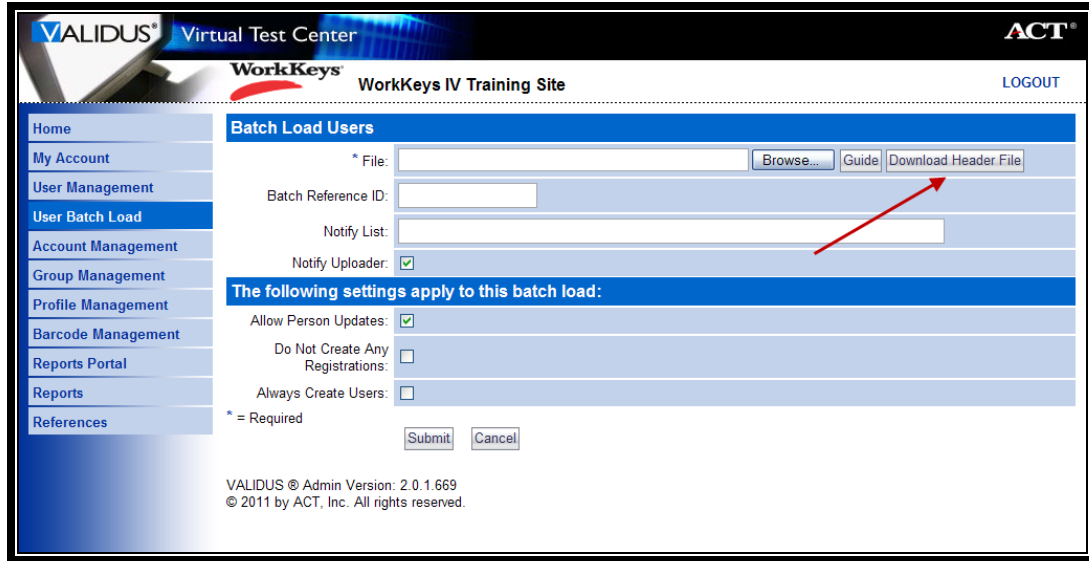


- Under the heading “Batch Load Users,” click the **Guide** button.

- You may want to print portions of this Guide for easy reference. Please note that the document is close to 100 pages long.
- To print specific pages, right click on the pop-up window, then select “Print Preview....” After you determine which pages you want to print, click on the Printer icon and type those page numbers in the “Pages” field. Click the **Print** button.
- You can also choose to save the document as a PDF before printing select pages.



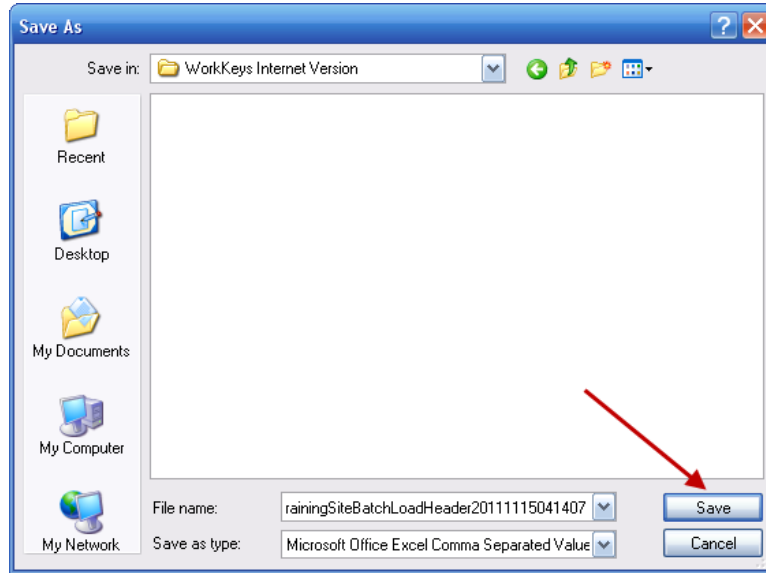
5. Under the same heading, click the **Download Header File** button.



6. Click the **Save** button, and navigate to the folder where you would like to save the file.



7. Once you get to the folder where you want to save the file, give the file a shorter and more descriptive name, then click the **Save** button. (The file should be saved as a “.csv” document.)



8. Click the **Open** button or navigate to the folder where you saved the file, then open the file.

The image shows an Excel spreadsheet with a header row and several empty rows below it. The header row contains the following fields: 1, firstName, middleName, lastName, dateOfBirth, employee, address1, address2, city, state, zipCode, email, Education, HighestDg, gender, hispanic, ethnicity, Language, Employm, ReasonFo, whichEmc, SchoolCu, WhyScho, user, Name, password, assessme, eligbilty, eligbilty, finProf, prof, field, group, id.

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## Procedure: Completing the Necessary Information

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Follow the steps below to complete the necessary information in the batch load Header File.

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### **IMPORTANT:**

- The system does not recognize leading zeros and will drop them off after you enter a number, leading to an error. To prevent this from happening, format the entire Excel spreadsheet as “Text” BEFORE you begin entering any information. (Highlight the entire spreadsheet, right click, then select *Format Cells > Number Tab > Category: Text*. Note that these instructions may be slightly different in other versions of Excel.)
  - The batch load header file is a .csv document, which does not retain formatting. If you save the file and re-open it to add more information, you will lose all previous formatting. You will then be required to reformat specific columns so that the file will properly load. Therefore, you should fill in the spreadsheet in one session, then upload (submit) it. If you expect that you will not be able to enter all of the necessary information in the header file just prior to uploading it, you should save it as an Excel Workbook. This will ensure you do not lose any formatting. However, before you upload the file, save it as a .csv file.
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1. Following the requirements in the Guide, you will need to include the four items listed below, at a minimum, in the appropriate columns:
  - **First Name** (as it will appear on the certificate)
  - **Last Name** (as it will appear on the certificate)
  - **Examinee ID** (Titled “employeeId” on the Header File)
  - **Group ID** (Required if using Groups)
2. We recommend you also include:
  - **User ID** (Titled “userName” on the Header File)
  - **Password**
  - **Date of Birth** (8-digit birth date with slashes – e.g., 06/20/1995)

***Please note the following about the above items:***

- a. First Name
  - This should be the examinee’s actual first name, which may not necessarily be the name he or she goes by.
  - Keep in mind that when the examinee arrives to take the test, he/she will need to present a photo ID. The name on the account needs to match the name on the photo ID. Slight variations are allowed, such as “Dave” instead of “David.”
  - If an examinee earns a National Career Readiness Certificate (NCRC), the name printed on the certificate will be the same as the name listed in the account.
  - This is one of the 5 match criteria used for the NCRC. It’s critical that the same first name (or variation) be used on all WorkKeys tests.

- b. Last Name
- As with the first name, the name on the account needs to match the name on the photo ID.
  - If an examinee earns an NCRC, the name printed on the certificate will be the same as the name listed in the account.
  - This is one of the 5 match criteria used for the NCRC.
- c. Examinee ID (Column labeled “employeeId”)
- This should be a series of numbers unique to the examinee. A suggestion would be a student ID number or an employee ID number.
  - Do NOT use the examinee’s driver’s license number, Social Security Number, or any number that contains a portion of his/her Social Security Number.
  - The number can include a maximum of 11 digits.
  - The Examinee ID is one of the 5 match criteria used for the NCRC, so it’s important that the same Examinee ID be used on all Internet Version and paper-and-pencil assessments.
- d. Group ID
- This number is found to the right of the group name in the Validus system, in the column labeled “ID.”
  - **If you do not enter it in the batch load Header File, you will need to manually add each examinee to a group.**
- e. User ID (Column labeled “userName”)
- We suggest creating a User ID that is easy to remember, such as the examinee’s last name and first initial of the first name followed by a number.
  - A User ID can be a combination of letters, numbers, and some symbols.
  - The following symbols cannot be used: < > "
  - White (blank) spaces are also not allowed.
  - Do NOT use an examinee’s driver’s license number, Social Security Number, or any number that contains a portion of his/her Social Security Number.
  - The User ID must be between 3 and 100 characters long.
  - Once a User ID has been entered into the system, it cannot be changed nor duplicated. This applies to the entire Validus system, not just your site’s realm.
- f. Password
- The system can generate a password for the examinee, but we recommend that you create one. The examinee can change it if he or she desires.
  - The password can be a combination of letters, numbers, and some symbols.
  - As with the User ID, white spaces are not allowed, nor are the following: < > "
  - The password is case sensitive.
  - It must be between 6 and 30 characters long.
- g. Date of Birth
- The birth month is one of the 5 match criteria used for the NCRC.
  - The birth day is also one of the 5 match criteria.
  - For business sites, enter “9999” for the birth year.

You can fill in more information (following the directions in the Guide), but it’s not required. The examinee will need to review and complete any missing information prior to launching the test.

**IMPORTANT:** Do not fill in the “FIPSSStateCountyName” or the “currentStatus” columns; only the examinee is to respond to these questions.

3. After you’ve filled in as many columns as you want, you **MUST** delete all columns that do not include any information. If you do not delete the unused columns, the file will not load.
4. Save the file. (It should default to a .csv file.)

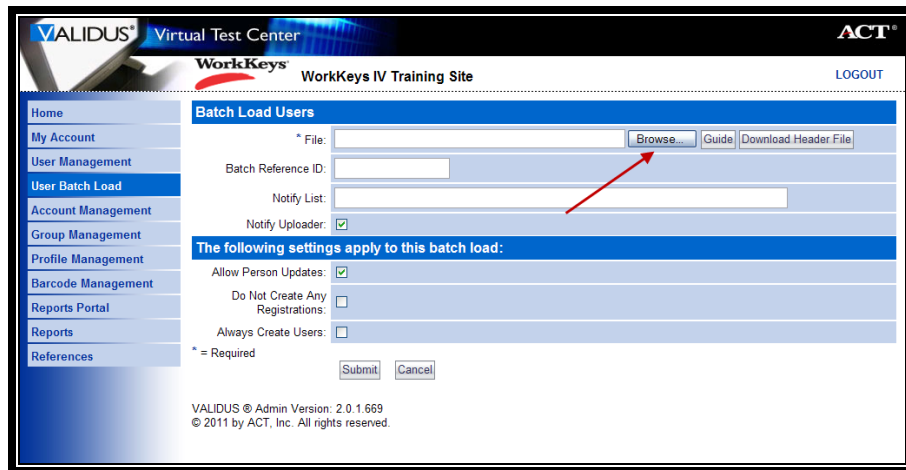
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Procedure: Uploading the Spreadsheet into Validus

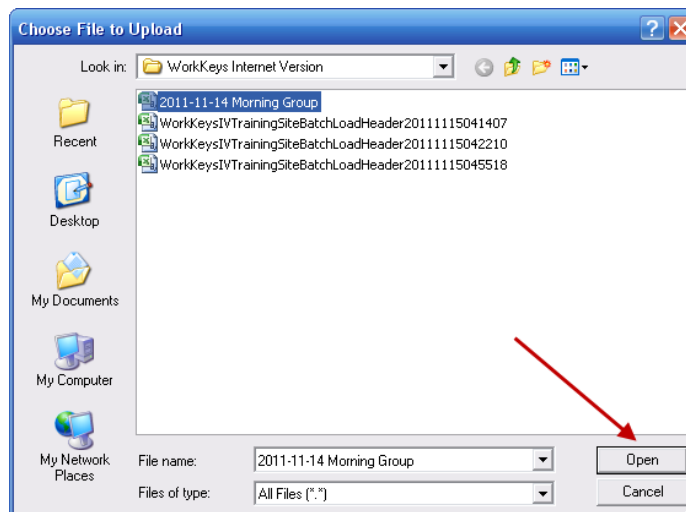
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Follow the steps below to upload the spreadsheet into Validus.

1. After completing the steps above, you should be on the “Batch Load Users” page (under **User Batch Load**, selected along the left side of the page). Click the **Browse** button.



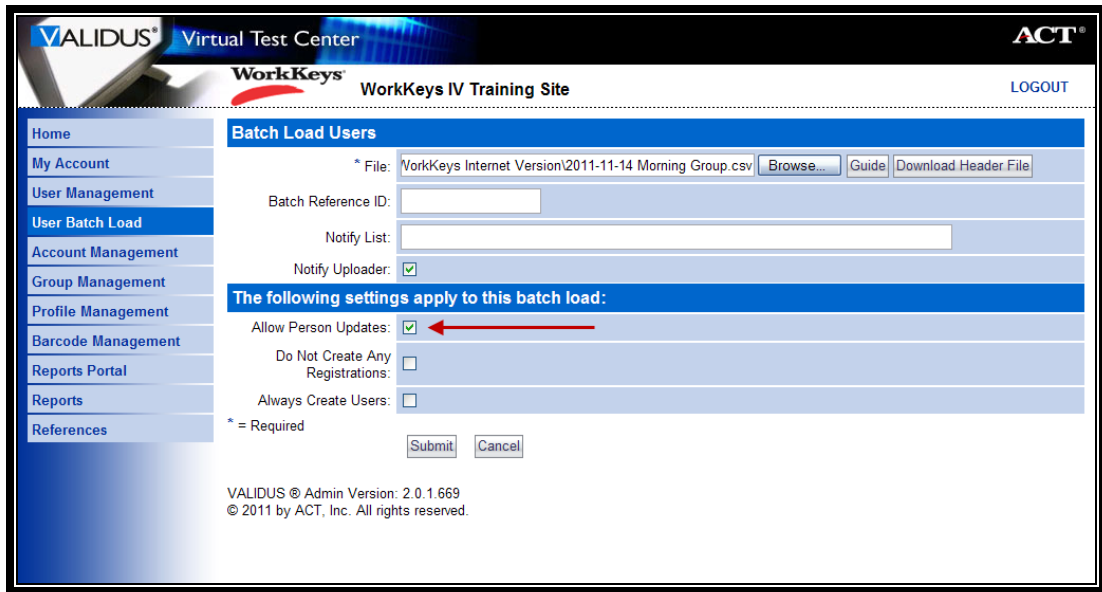
2. Select the “csv” file you want to load. Click the **Open** button.



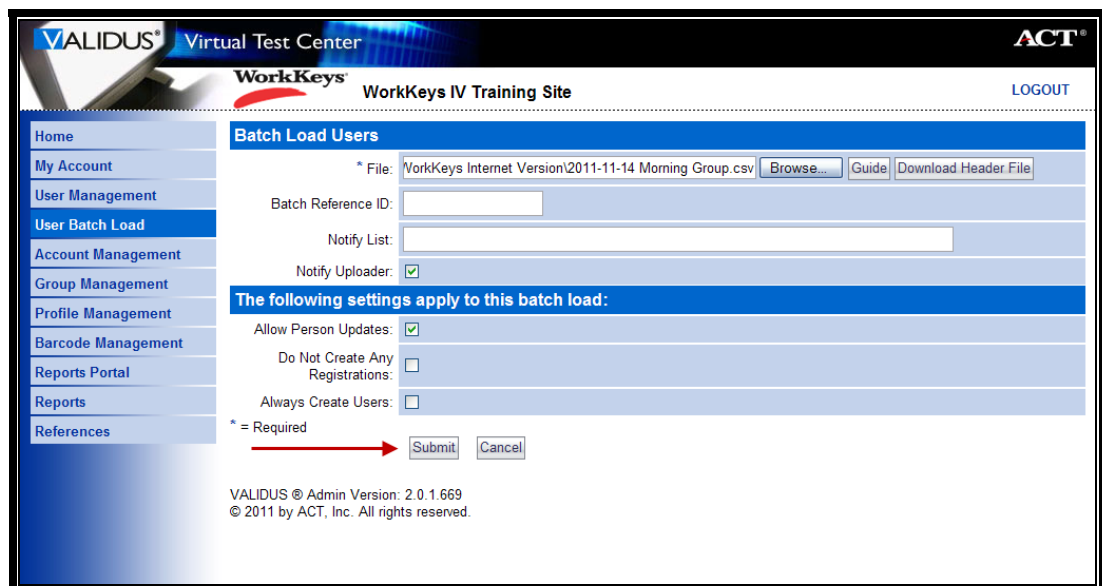


- Under “The following settings apply to this batch load” section, the following box should have a check mark next to it:
  - Allow Person Updates

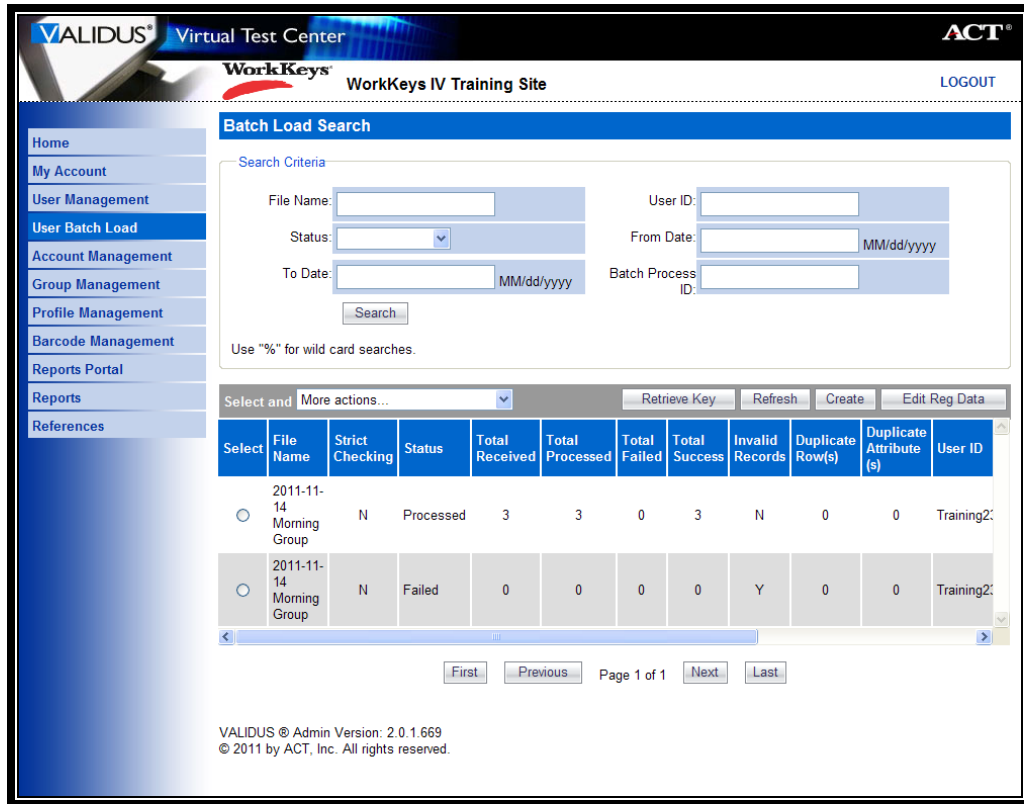
If you want the system to create unique User IDs (instead of creating your own), click in the box to the right of “Always Create Users” so that a check mark appears.



- Click the **Submit** button at the bottom of the page.



- The screen should now say “Batch Load Search” at the top, and the file you just loaded should be the first file listed under “File Name.” Click the **Refresh** button to see the current status. Continue to click the **Refresh** button until the status changes to “Processed.”



For rows of information that loaded successfully (“Total Success”), you will find corresponding examinee records in the Validus system.

For rows of information that failed (“Total Failed”), you will need to look at the Invalid Rows File and the Log File.

The Invalid Rows File will include information for only those records that did not load. You will need to correct the information in this file and then upload it. The file name should default to something different than the original file. You can rename it if you’d like, but do not use the same name as the batch load header file you initially loaded.

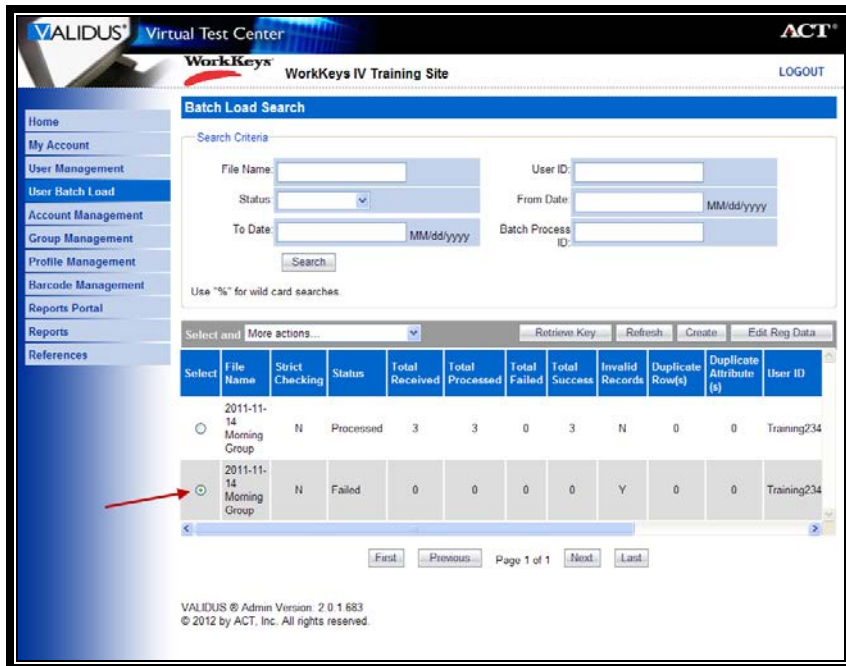
The Log File will indicate the type of error so that you can determine what needs to be corrected in the Invalid Rows File.

Procedure: Accessing the Invalid Rows File and the Log File

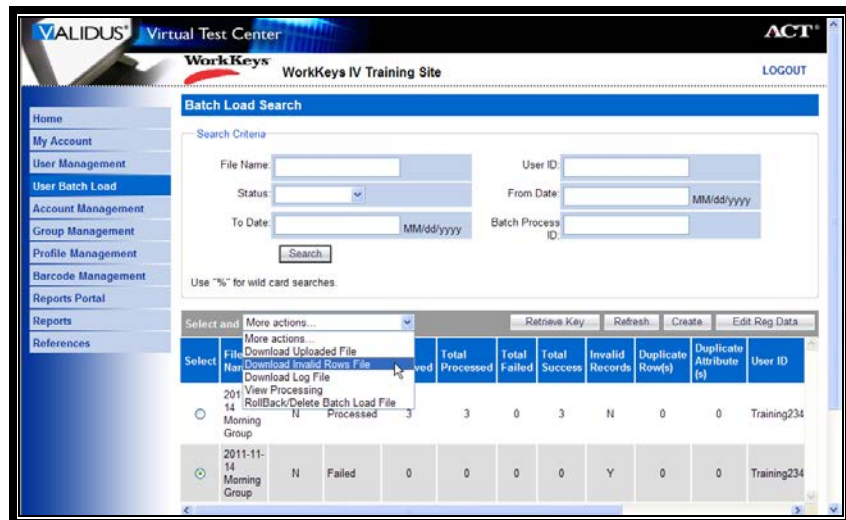
Follow the steps below to access the Invalid Rows File and the Log File.

**REMINDER:** Since the Invalid Rows File and the Log File contain Personally Identifiable Information (PII), they are both encrypted. To open the files, you will need WinZip or 7-Zip (a free program you can download off the Internet).

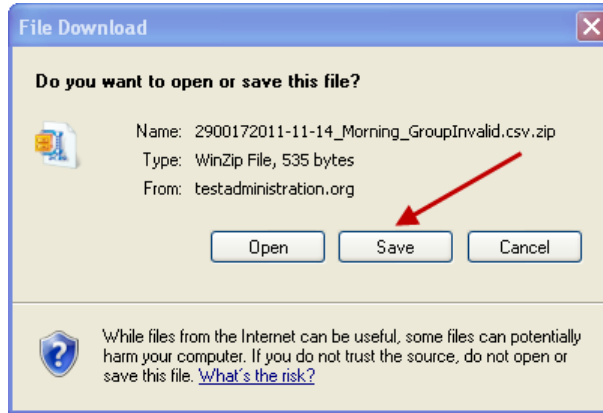
1. Click the radio button to the left of the file name.



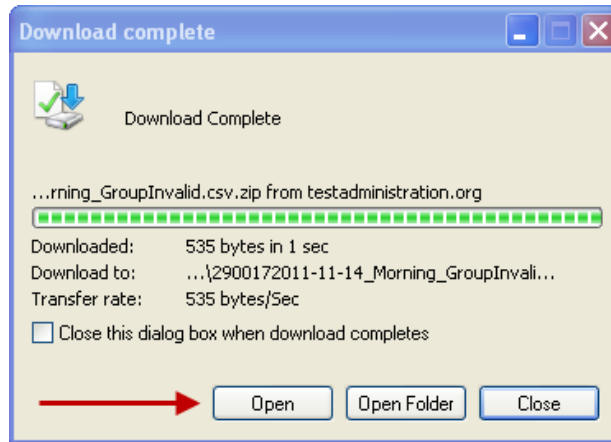
2. Click the “down arrow” next to “More actions...,” then select “Download Invalid Rows File.”



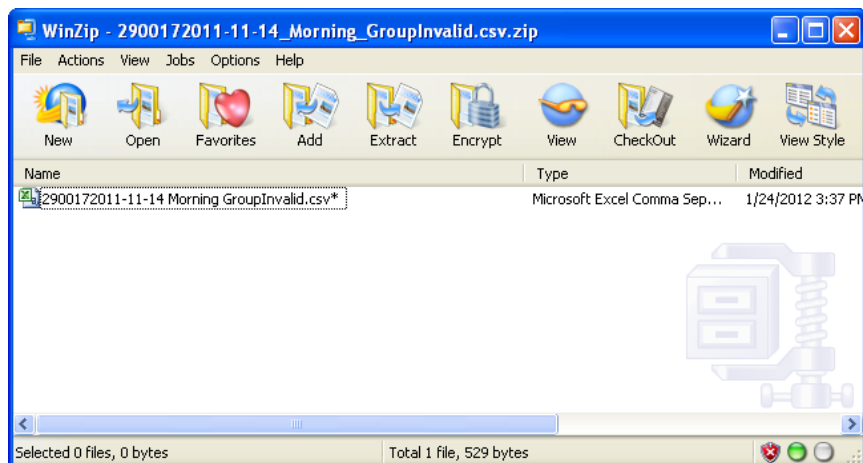
3. Click the **Save** button to save this file on your computer.



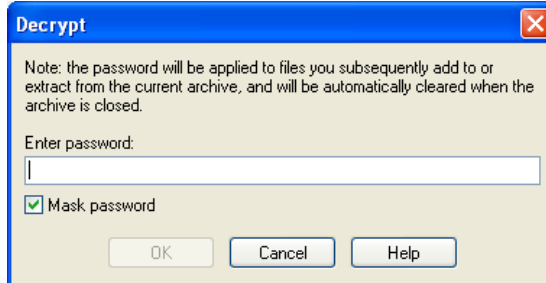
4. Click the **Open** button to open the file.



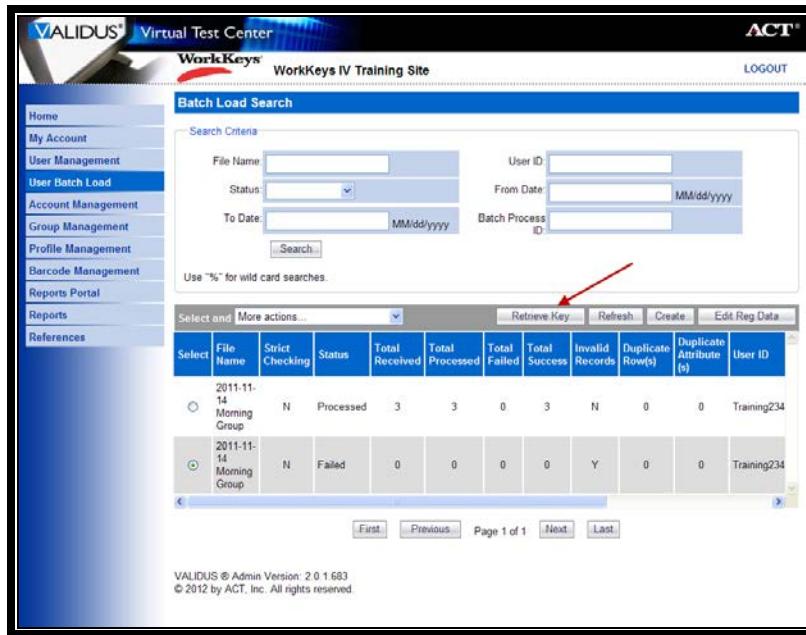
5. A new window will appear that will include the zipped file. Open the file.



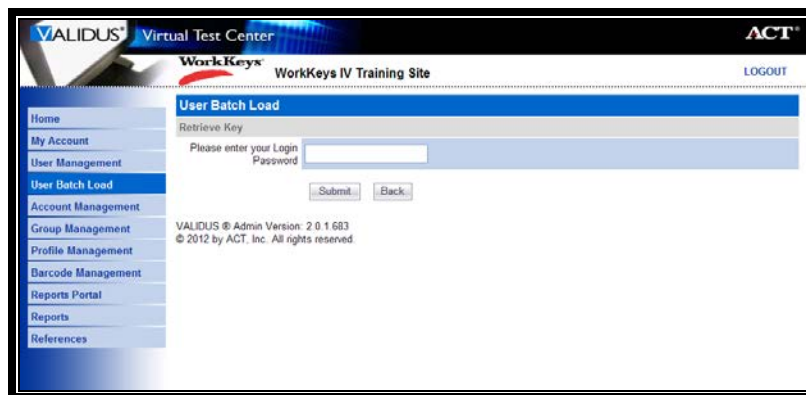
- You will be asked to enter a password. This is where you will need to enter a “key” from the Validus system.



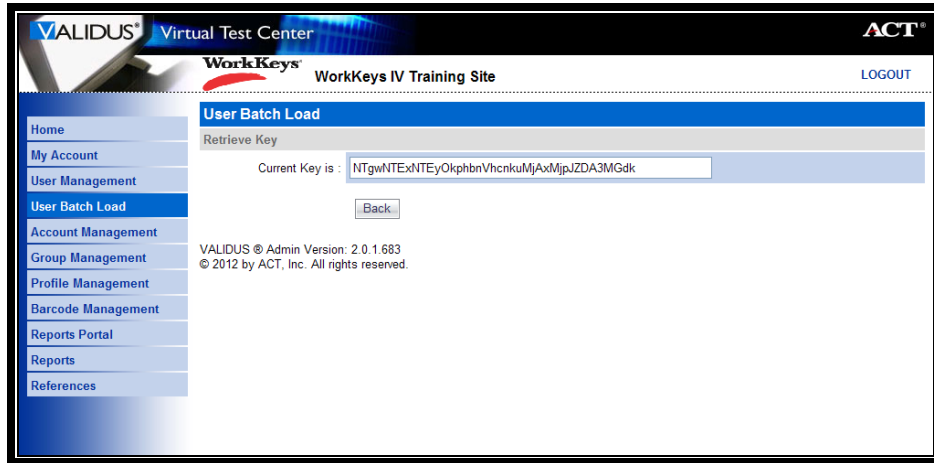
- Click on the Batch Load Search page in Validus, then click on the **Retrieve Key** button.



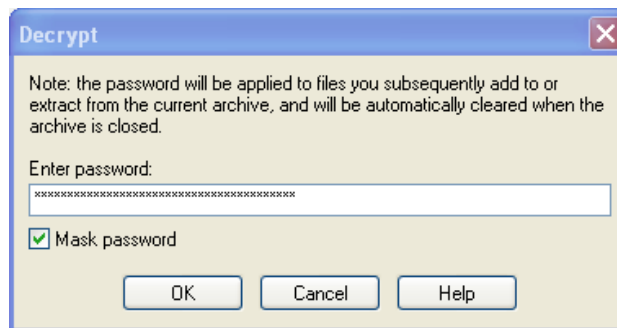
- Enter the password you used to log in to Validus.



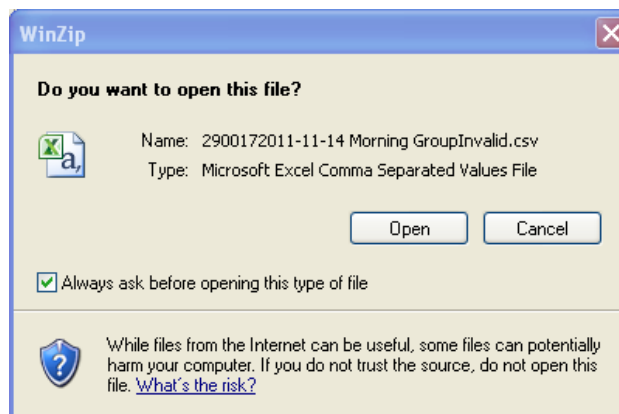
- The current key will appear. (This key changes every month.) Copy this key, then click the **Back** button.



- Paste this key into the “Enter password” box in the Decrypt pop-up window, then click the **OK** button.



- Click on the **Open** button. Only those rows that have not loaded due to errors in them will appear. The rest of the file has loaded.



12. Repeat steps 1-11 above to open the Log File. (In step 2, you will need to click the “down arrow” next to “More actions...,” then select “Download Log File.”)
13. Make any necessary corrections in the Invalid Rows File based on the information shown in the Log File. The “Line Number” indicated in the Log File corresponds to the line number in the Invalid Rows File.
14. Upload the Invalid Rows File. (Repeat steps 1-5, beginning on page 8.)

**Example of the Invalid Rows File:**

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	firstName	middleNa	lastName	dateOfBir	employee	address1	address2	city	state	zipCode	email	Education	HighestDe	gender	hispanicIn eth
2	Donald		Duck		2468										
3	Mickey		Mouse		1357										
4	Minnie		Mouse		1609147										
5															
6															
7															

**Example of the Log File:**

The red arrows indicate where you would find the information that needs to be corrected in the Invalid Rows File.

```

2900172011-11-14 Morning Group.log - Notepad
File Edit Format View Help

#####
Summary of the BatchLoad - Refer uploaded file.
#####

File: 2011-11-14 Morning Group with Batch ID-290017 has failed processing in workkeys IV
Training Site.
File loaded by : Administrator Training (580511512)
Notify List : null
Allow Person Updates : true
Do Not Create Registrations : false
Always Create Users : false

Pre-processing of the file has exceeded the current threshold limit for failed records.
This is currently set at 25% of the total number of records in the file. The percentage of
failed records in this file was 75%.

LINE NUMBER: 2
assessmentId () is invalid.
profileId () is invalid.

LINE NUMBER: 3
assessmentId () is invalid.profileId () is invalid.
LINE NUMBER: 4
assessmentId () is invalid.profileId () is invalid.
    
```