**Bulk upload of schedules work instructions**

Before you start this process you will need to ensure that you have the following set up and information to hand to complete the template;

- Venue set up
- ATO training course set up (make a note of the title)
- If you are amending or cancelling take a note of Schedule ID
- Start and end dates (these dates have to be from tomorrow onwards)
- Start and end times.

Work instructions

1. Go to myportal.citb.co.uk
2. Click on sign in and input your email address and password
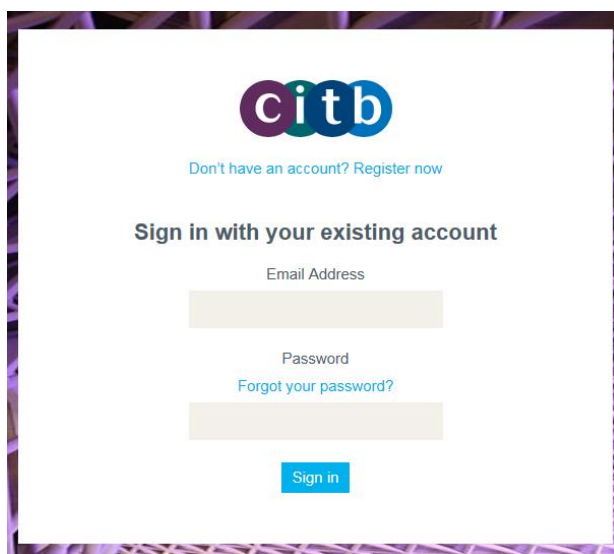

3. On the left-hand menu, select 'Submit Bulk Training Schedules'
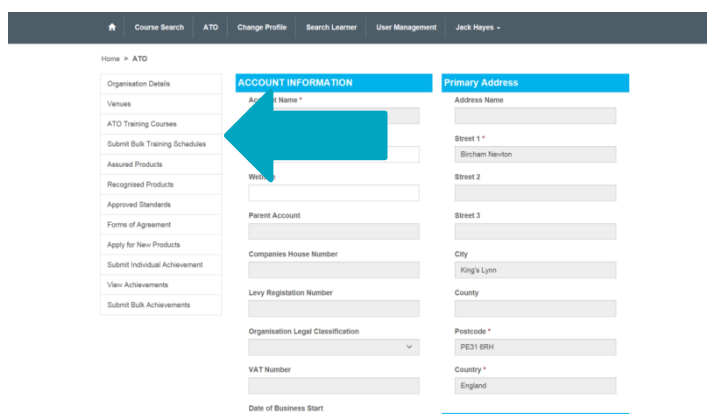
4. At the top of the page you will see four options, you are now able to select 'Download blank CSV file'. A box will appear on your screen asking if you are wanting to 'open, save or save as' select Save.
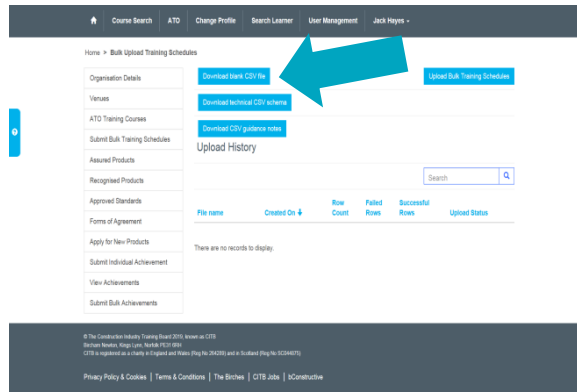

5. Once the page has loaded you will see a yellow bar across the top of the page, select 'enable editing and enable content'.

6. Here there are 3 options available Create, Amend or Cancel. You will need to select the option depending on the required outcome. This is under the action tab on the grid, select from the dropdown. This can be either to create a new training schedule, amend a current training schedule or to cancel a current training schedule.
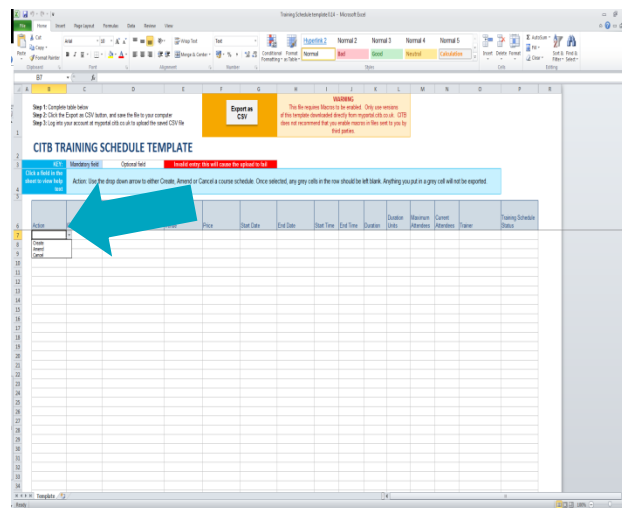
7. Once you have selected your chosen option, you will need to fill out all mandatory cells. The white cells are optional; the blue cells highlighted are your mandatory cells, any cell that highlights reds means that the data inputted is invalid. You will need to amend any data that is highlighted red before exporting the template. You will be unable to continue on to the next step of the process. On the right hand side of the spreadsheet you will see 'Training schedule' status if your course is private or full you are able to select the option, if you still have spaces leave box blank.
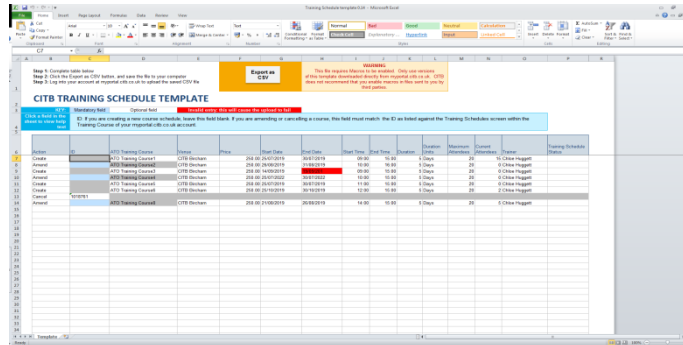

8. Once you are happy with the data you have inputted in to the spreadsheet, you now need to select ' Export as CSV' and select 'Yes, Export now'

9. Select the location where you want to save the file; you are now able to rename the file to something that is relevant to you.

10. Once you are happy with the file name select save and then 'ok', when you exit the program you will be asked if you want to save again, you can select don't save.

11. Go back on to the portal and select ' Upload Bulk Training Schedules'
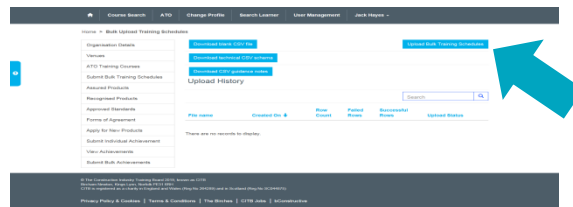
12. You now need to select 'Browse' and select the file you saved earlier. Once you are happy with the file you have selected, you can now select 'Submit'.

Schedules may take up to 30 minutes to load on the construction training directory. Please do not resubmit during this time.

13. You are now on the last step of the process you will be able to see if the file has 'Passed or Failed'
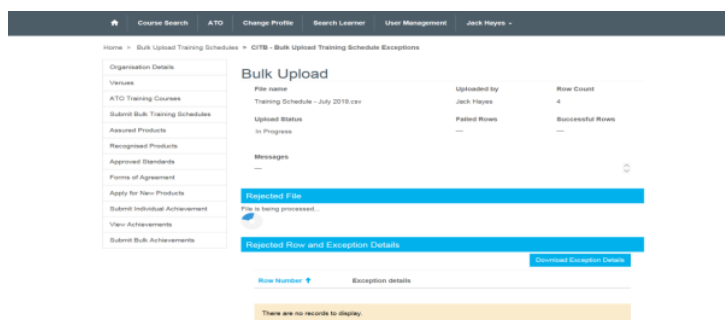
14. If your file 'Failed' you are able to select the file and edit the data with the correct information and you will need to submit again. (Referring back to step 11). You have now completed the process.

For information, help and support please email: ctdservices@citb.co.uk, or visit our website: citb.co.uk