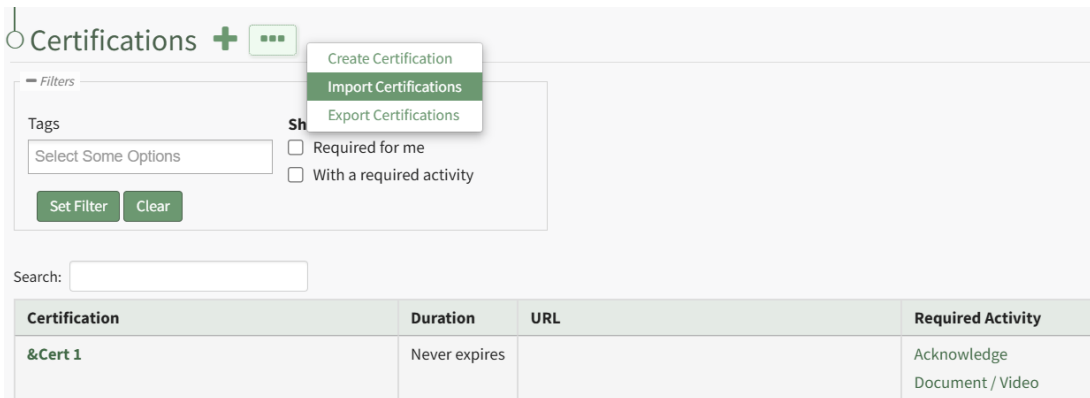


Import Certifications

Certifications can be imported in bulk into KAStack from a CSV file.

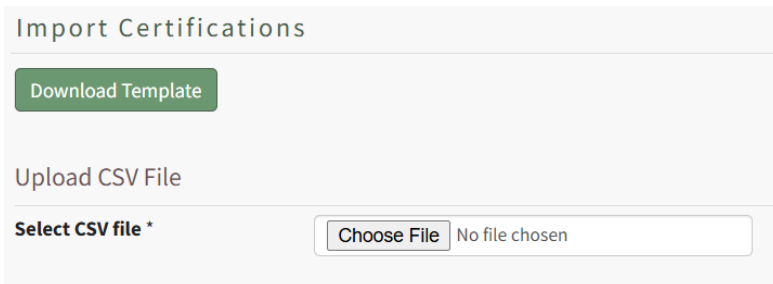
To import certifications, open the Certifications Page in the People Module from the Main Menu to display the Certifications Table. Click the three dot (...) icon to the right of the header to open a context menu and select "Import Certifications".



The screenshot shows the 'Certifications' page interface. At the top left, there is a header 'Certifications' with a plus sign and a three-dot menu icon. A context menu is open, showing three options: 'Create Certification', 'Import Certifications' (highlighted in green), and 'Export Certifications'. Below the menu, there are filter options including a 'Tags' dropdown, a 'Search' input, and checkboxes for 'Required for me' and 'With a required activity'. A table below the filters shows a single certification entry:

Certification	Duration	URL	Required Activity
&Cert 1	Never expires		Acknowledge Document / Video

This opens the Import Certifications Page. A template is provided to simplify importing.



The screenshot shows the 'Import Certifications' page. It features a 'Download Template' button in a green box. Below this, there is an 'Upload CSV File' section with a 'Select CSV file *' label and a 'Choose File' button next to a text box that says 'No file chosen'.

Click the "Download Template" button to download the Certifications Template CSV to your device.

If you'd like to modify existing Certifications in bulk using Certification Import, in contrast or in addition to using Certification Import to create new Certifications, you can first export all Certifications from KAStack to a CSV file and work off of that file. Read more [here](#).

When ready, open the downloaded file (or create a new CSV file, if desired) in your favorite text editor / spreadsheet software (e.g. Excel, Sheets, etc.).

When preparing a CSV file for import, the following fields must be included in the first row of the file, each in their own cell, acting as header columns. Information for the Certification(s) will be listed on subsequent rows beneath each column header. All column headers must be included even if they don't apply to all Certifications being imported.

Some of these fields require meeting certain criteria when filling them out for KAStack to import the Certification properly. The fields and supplemental information are outlined below:

Column Header	Information
Certification ID	To create a new Certification, leave this blank. On import and creation, KAStack will assign the Certification a unique ID. To find out an existing Certification's ID, you can export all Certifications, or find it in the URL when viewing the Certification's page after clicking its name from the Certification's table. Listing an ID in the import, paired with the matching Certification's name, allows you to update information about that Certification through the import process. The ID will be a whole integer.
Name	This is a required field. Cannot have the same name as another Certification in KAStack. Cannot contain the characters ;<>V
Information	Any text or none at all, used to describe the Certification.
External URL	Optionally include a URL to a webpage that can be used to help guide the person submitting the Certification or provide them with important information.
Cost of Training	Optionally include a decimal value if this Certification has an associated cost.
Time to Complete	Optionally include a decimal value if this Certification takes a certain amount of time to complete that you'd like to keep track of.
Time to Complete Period	Coupled with the field above to give a unit of time for the Time to Complete. Must be Hours, Days, Weeks, Months, Years, or None.
Certification Expires	Must be (case-insensitive) Yes, Y, On, True, or 1 for affirmative, or (blank), No, N, Off, False, or 0 for negative.
Duration	Must be a positive integer.
Duration Period	Coupled with the field above to give a unit of time for the Duration. Must be Days, Weeks, Months, Years, or None.
Extend Duration	Must be Month, Year, or None.
Due	Must be a positive integer.
Due Period	Coupled with the field above to give a unit of time for when the Certification will become Due. Must be Days, Weeks, Months, Years, or None.
Overdue	Must be a positive integer.
Overdue Period	Coupled with the field above to give a unit of time for when the Certification will become Overdue. Must be Days, Weeks, Months, or None.

Refresher Training	Must be (case-insensitive) Yes, Y, On, True, or 1 for affirmative, or (blank), No, N, Off, False, or 0 for negative.
Refresher Cost of Training	Optionally include a decimal value if this Certification's Refresher Training has an associated cost.
Refresher Time to Complete	Optionally include a decimal value if this Certification's Refresher Training takes a certain amount of time to complete that you'd like to keep track of.
Refresher Time to Complete Period	Coupled with the field above to give a unit of time for the Refresher Time to Complete. Must be Hours, Days, Weeks, Months, Years, or None.
Refresher Duration	Must be a positive integer.
Refresher Duration Period	Coupled with the field above to give a unit of time for the Refresher Duration. Must be Days, Weeks, Months, Years, or None.
Refresher Extend Duration	Must be Month, Year, or None.
Refresher Due	Must be a positive integer.
Refresher Due Period	Coupled with the field above to give a unit of time for when the Certification's Refresher Training will become Due. Must be Days, Weeks, Months, Years, or None.
Refresher Overdue	Must be a positive integer.
Refresher Overdue Period	Coupled with the field above to give a unit of time for when the Certification's Refresher Training will become Overdue. Must be Days, Weeks, Months, or None.
Hide From Shared Reports	Must be (case-insensitive) Yes, Y, On, True, or 1 for affirmative, or (blank), No, N, Off, False, or 0 for negative.
Hide From QR Reports	Must be (case-insensitive) Yes, Y, On, True, or 1 for affirmative, or (blank), No, N, Off, False, or 0 for negative.
Hide From People Module Levels	List the exact name of an existing Access Level(s) that this Certification should be hidden from. If listing multiple Access Levels, separate them with a semicolon.
Hide Attachments From Shared Reports	Must be (case-insensitive) Yes, Y, On, True, or 1 for affirmative, or (blank), No, N, Off, False, or 0 for negative.
Hide Attachments From QR Reports	Must be (case-insensitive) Yes, Y, On, True, or 1 for affirmative, or (blank), No, N, Off, False, or 0 for negative.
Hide Attachments From People Module Levels	List the exact name of an existing Access Level(s) that Attachments for this Certification should be hidden from. If listing multiple Access Levels, separate them with a semicolon.
Require Attachment	Must be (case-insensitive) Yes, Y, On, True, or 1 for affirmative, or (blank), No, N, Off, False, or 0 for negative.
Auto Approve User Submissions	Must be (case-insensitive) Yes, Y, On, True, or 1 for affirmative, or (blank), No, N, Off, False, or 0 for negative.

Auto Approve On Activity Completion	Must be (case-insensitive) Yes, Y, On, True, or 1 for affirmative, or (blank), No, N, Off, False, or 0 for negative.
Allowed Batch Submission Roles	List the exact name of an existing Certification Role(s) that should have the ability to batch submit this Certification. If listing multiple Certification Roles, separate them with a semicolon.
Generate Attachment On Approval	Must be (case-insensitive) Yes, Y, On, True, or 1 for affirmative, or (blank), No, N, Off, False, or 0 for negative.
Generate Attachment On Activity Completion	Must be (case-insensitive) Yes, Y, On, True, or 1 for affirmative, or (blank), No, N, Off, False, or 0 for negative.
Hide Expiration Date In Generated Attachments	Must be (case-insensitive) Yes, Y, On, True, or 1 for affirmative, or (blank), No, N, Off, False, or 0 for negative.
Attach Certificates To Notifications	Must be (case-insensitive) Yes, Y, On, True, or 1 for affirmative, or (blank), No, N, Off, False, or 0 for negative.
Parent Certification (?)	List the exact name of an existing Certification that is the Parent Certification of this Certification.
Child Certification(s) (?)	List the exact name of an existing Certification(s) that is/are a Child Certification(s) of this Certification. If listing multiple Certifications, separate them with a semicolon.

Once your file is ready for import, return to KAStack's Import Certification's page. Click the "Choose File" button to select the CSV file from your device. The page will then update to show all of the expected fields, and a dropdown box to their right.

Import Certifications

[Download Template](#)

Upload CSV File

Select CSV file * Certifications_live_2026-01-28.csv

Certification ID

Name

Information

External URL

Cost of Training

Time to Complete

Time to Complete Period

The dropdown box is used to map column headers from the CSV to the fields necessary for Certification Import. If the column header name matches the system field's name, KAStack will automatically set that field's dropdown box to the matching name. If you have used different column header names in your CSV, you can manually select from the dropdown which column headers from your file go with which system field.

Click the "Import certifications" to upload the file and import the changes into KAStack. The screen will then display a success or fail message, and, if failed, alert to any changes that should be made to the imported file. If the import fails, no certifications will be imported/created or updated. If successful, KAStack will inform how many new Certifications were created, and how many existing

ones have been updated.

Revision #3

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