USER GUIDE

Employee Settings: Import Functionality

Administration User Guide

SYSTEMS24-7

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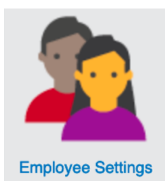
Do you complete classroom-based training for items housed on Systems 24-7 such as: Training, Monthly Talks, Surveys or Library Sign-Offs? As an **Administrator** for your company, you can easily import these items into Systems 24-7.

To access this functionality, start with accessing the administration section via the **Admin** button at the top right corner of your website. If you do not see this button, you may not have the proper administration privileges in the system.



Once you are in the **Administration** section, click on **Employee Settings** to see the Employee Settings functions.

This user guide will walk you through the import functionality of the Employee Settings feature. For all other functions, please refer to the **Employee Setting – Administration User Guide**.

Import Course Scores

After selecting **Employee Settings** from the admin menu, start by accessing the **Import Course Scores** function.

> Import Course Scores
>
> Use this function to mass import course scores. Courses must be set-up in the system in order to have a score uploaded to it.

This page provides a template to download so that it is easy to upload your results to the system, but the course must already be on Systems 24-7 in order to complete the import. This is a quicker solution when more than 10 employees need course scores added for courses completed offline.

> Refer to the **Course Settings – Administration User Guide** for step-by-step instructions on how to add a course to the system.

This tool has the ability to create a customized template making your imports easier. If you do not see this option, you may not have permissions to these settings.

Step 1: Select **"Click to expand the available export files"** dropdown menu.

Click to expand the available export filters

Download Template

Step 2: Make your selections from the filters using the available dropdown menus.

In our example we are importing completion dates and course scores for all users within a department for a Handwashing – Video course.

Department: Niagara Office : Services

User: * All

Course Name: * Handwashing - Video

Step 3: Once you have made your selections, click the **Download Template** button. The system will provide a .csv file. Open this document and complete the import sheet by filling it with data.

For a successful import, all information in the file needs to be accurate (and consistent with the data on Systems 24-7). If you make an error in any of the required fields, there will be issues with being able to match completion records to employees.

In our example, we will add the completion date and score for each user. For the **Date Completed** column, enter the date in one of the following formats:

- MM/DD/YYYY
- DD/MM/YYYY
- YYYY-MM-DD
- YYYY-DD-MM

	A	B	C	D	E	F
1	First Name	Last Name	Username	Course Title	Date Completed	Score
2	Site	Admin	sadmin1	Handwashing - Video	01/22/2021	100
3	Test	User 3	tuser3	Handwashing - Video	01/22/201	100

Step 4: On the **Import Course Scores** page, choose whether or not you want to **Allow Duplicate Scores** and/or **Auto Assign Course to Employee**.

Allow Duplicate Scores: This means if the user already has a record in the system, you will allow another record to replace it.

Auto Assign Course to Employee: This means if the employee has not been assigned this course, by importing the score you will assign it to their list of training.

Step 5: Select the **Date Format** to match your completion date entry.

Date Format in Template: MM/DD/YYYY

Step 6: Select **Browse** to upload your **Import File**. After making your selection, click **Import**.

Import File: * Browse... No file selected.

The system will prompt you to confirm you would like to import employee scores for the selected company. Select **OK** to complete the upload.

Allow the import to run, the system will notify you when the import is complete. If you have an email associated with your account, you will be emailed a copy of the report along with any errors that may have occurred during the import process.

Score import complete. 0 courses assigned to users. 1 scores added to the system. 2 records processed.

The system will inform you of how many courses were assigned to users, how many scores were added to the system and how many entries were processed.

In the event there was an error with one of your entries, you can download a file for the "non-inserted" entries so that you can correct the errors.

Download non-inserted file: ImportCourseScores_2021-01-22_15252_non-inserted.csv

After fixing any errors or inconsistencies with system information, repeat Steps 4 through 6.

Import Library View/Sign-Off

After selecting **Employee Settings** from the admin menu, start by accessing the **Import Library View/Sign-Off** function.

Import Library File View/Signoff

Use this option to import "views" and sign-offs to a resource in any library.

This page provides a template to download so that it is easy to upload your results to the system, but the library file must already be on Systems 24-7 in order to complete the import. **It's important to note, if there is a sign-off requirement turned on for a library file, the sign-off will also be uploaded.** This is a quicker solution when more than 10 employees need records added due to reviewing a policy in-person with a group of employees.

Refer to the **Library Settings – Administration User Guide** for step-by-step instructions on how to add a resource to the system.

This tool has the ability to create a customized template making your imports easier. If you do not see this option, you may not have permissions to these settings.

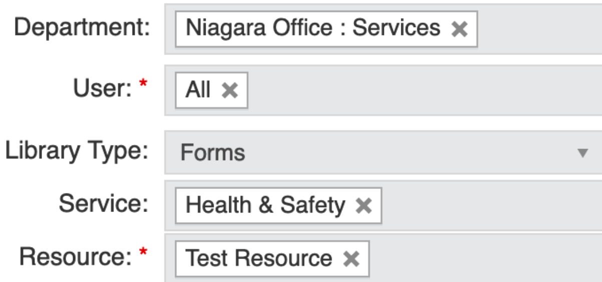
Step 1: Select **"Click to expand the available export files"** dropdown menu.

Click to expand the available export filters

Download Template

Step 2: Make your selections from the filters using the available dropdown menus.

In our example we are importing completion dates for all users within a department for a specific Health & Safety Form.



Step 3: Once you have made your selections, click the **Download Template** button. The system will provide a .csv file. Open this document and complete the import sheet by filling it with data.

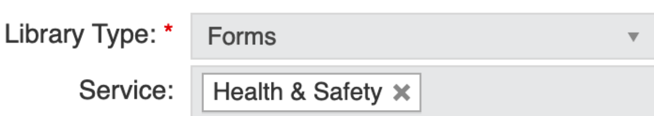
For a successful import, all information in the file needs to be accurate (and consistent with the data on Systems 24-7). If you make an error in any of the required fields, there will be issues with being able to match completion records to employees.

In our example, we will add the completion date for each user. For the **Date Completed** column, enter the date in one of the following formats:

- MM/DD/YYYY
- DD/MM/YYYY
- YYYY-MM-DD
- YYYY-DD-MM

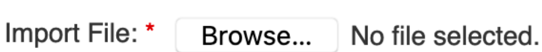
	A	B	C	D	E	F
1	First Name	Last Name	Username	Library Header	Resource Name	Date Completed
2	Site	Admin	sadmin1	Test Header	Test Resource	01/22/2021
3	Traci	test	tracitest	Test Header	Test Resource	01/22/2021

Step 4: On the **Import Library View/Signoff** page, you will need to select the **Library Type** and **Service** you used in your spreadsheet.



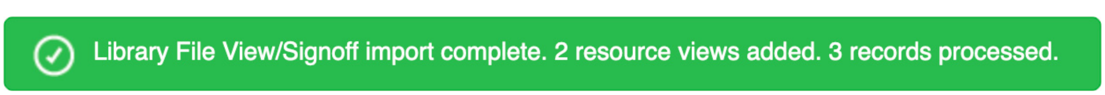
Step 5: Select the **Date Format** to match your completion date entry.

Step 6: Select **Browse** to upload your **Import File**. After making your selection, click **Import**.



The system will prompt you to confirm you would like to import a library view/signoff for the selected company. Select **OK** to complete the upload.

Allow the import to run, the system will notify you when the import is complete. If you have an email associated with your account, you will be emailed a copy of the report along with any errors that may have occurred during the import process.



The system will inform you of how many records were added and how many were processed.

In the event there was an error with one of your entries, you can download a file for the “non-inserted” entries so that you can correct the errors.

Download non-inserted file: ImportLibraryFileView_2021-01-22_15252_non-inserted.csv

After fixing any errors or inconsistencies with system information, repeat Steps 4 through 6.

Import Monthly Talk Completion

After selecting **Employee Settings** from the admin menu, start by accessing the **Import Monthly Talk Completion** function.

Import Monthly Talk Completion

Use this option to import a completion record for quiz questions on a monthly talk.

This page provides a template to download so that it is easy to upload your results to the system, but the monthly talk must already be on Systems 24-7 in order to complete the import. **It’s important to note, you are adding a record of the employee completing the monthly talk, not a record of their quiz responses or a physical sign-off.** This is a quicker solution when more than 10 employees need records added due to reviewing a monthly talk in-person with a group of employees.

Refer to the **Monthly Talk – Administration User Guide** for step-by-step instructions on how to add a monthly talk to the system.

This tool has the ability to create a customized template making your imports easier. If you do not see this option, you may not have permissions to these settings.

Step 1: Select **“Click to expand the available export files”** dropdown menu.

Click to expand the available export filters

Download Template

Step 2: Make your selections from the filters using the available dropdown menus.

In our example we are importing completion dates for all users within a department for a specific monthly talk.

Department: Niagara Office : Technology ✖

User: * All ✖

Monthly Talk: * Joe Test ✖

Step 3: Once you have made your selections, click the **Download Template** button. The system will provide a .csv file. Open this document and complete the import sheet by filling it with data.

For a successful import, all information in the file needs to be accurate (and consistent with the data on Systems 24-7). If you make an error in any of the required fields, there will be issues with being able to match completion records to employees.

In our example, we will add the completion date for each user. For the **Date Completed** column, enter the date in one of the following formats:

- MM/DD/YYYY
- DD/MM/YYYY
- YYYY-MM-DD
- YYYY-DD-MM

	A	B	C	D	E
1	First Name	Last Name	Username	Monthly Talk	Date Completed
2	Basic	User 1	buser1	Joe Test	01/22/2021
3	Basic	User 2	buser2	Joe Test	01/22/2021

Step 4: On the **Import Monthly Talk Completion** page, you will need to select the **Date Format** you used in your spreadsheet.

Date Format: * MM/DD/YYYY

Step 5: Select **Browse** to upload your **Import File**. After making your selection, click **Import**.

Import File: * Browse... No file selected.

The system will prompt you to confirm you would like to import a monthly talk completion for the selected company. Select **OK** to complete the upload.

Allow the import to run, the system will notify you when the import is complete. If you have an email associated with your account, you will be emailed a copy of the report along with any errors that may have occurred during the import process.

Monthly Talk Completion import complete. 1 records added. 1 records processed.

The system will inform you of how many records were added and how many were processed.

In the event there was an error with one of your entries, you can download a file for the "non-inserted" entries so that you can correct the errors.

Download non-inserted file: ImportMonthlyTalkCompletionList_2021-01-22_15252_non-inserted.csv

After fixing any errors or inconsistencies with system information, repeat Steps 4 and 5.

Import Survey Completion

After selecting **Employee Settings** from the admin menu, start by accessing the **Import Survey Completion** function.

Import Survey Completion

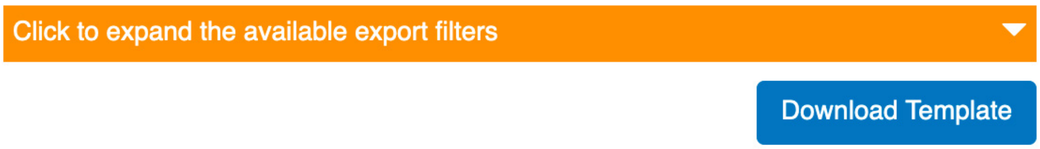
Use this option to import a completion record to a survey.

This page provides a template to download so that it is easy to upload your results to the system, but the survey must already be on Systems 24-7 in order to complete the import. **It's important to note, you are adding a record of the employee completing the survey, not a record of their survey responses.**

> Refer to the **Survey – Administration User Guide** for step-by-step instructions on how to add a survey to the system.

This tool has the ability to create a customized template making your imports easier. If you do not see this option, you may not have permissions to these settings.

Step 1: Select **"Click to expand the available export files"** dropdown menu.



Step 2: Make your selections from the filters using the available dropdown menus. Here are some examples to get you started:

- You may want to create a template for all users within a specific department. To do this, leave **Users** to "All" and select the **Department** you wish to use.
- You may want to create a template that includes all users but for a specific survey. In this case, leave **Users** to "All" and select the **Survey** you wish to mark as completed.

Step 3: Once you have made your selections, click the **Download Template** button. The system will provide a .csv file. Open this document and complete the import sheet by filling it with data.

For a successful import, all information in the file needs to be accurate (and consistent with the data on Systems 24-7). If you make an error in any of the required fields, there will be issues with being able to match completion records to employees.

In our example, we will add the completion date for each user. For the **Date Completed** column, enter the date in one of the following formats:

- MM/DD/YYYY
- DD/MM/YYYY
- YYYY-MM-DD
- YYYY-DD-MM

	A	B	C	D	E
1	First Name	Last Name	Username	Survey	Date Completed
2	Test	User 1	tuser1	Test Survey	01/22/2021
3	Test	User 2	tuser2	Test Survey	01/22/2022

Step 4: On the **Import Survey Completion** page, you will need to select the **Date Format** you used in your spreadsheet.

Date Format: * MM/DD/YYYY

Step 5: Select **Browse** to upload your **Import File**. After making your selection, click **Import**.

Import File: * Browse... No file selected.

The system will prompt you to confirm you would like to import a survey completion for the selected company. Select **OK** to complete the upload.

Allow the import to run, the system will notify you when the import is complete. If you have an email associated with your account, you will be emailed a copy of the report along with any errors that may have occurred during the import process.

Survey Completion import complete. 1 records added. 5 records processed.

The system will inform you of how many records were added and how many were processed.

In our example, 4 of our entries were not recorded. In the event this happens to you, you can download a file for the “non-inserted” entries so that you can correct the errors.

Download non-inserted file: ImportSurveyCompletionList_2021-01-22_15252_non-inserted.csv

After fixing any errors or inconsistencies with system information, repeat Steps 4 and 5.