USER GUIDE

Employee Settings - Import Functionality

Administration User Guide

**DUNK & ASSOCIATES
SYSTEMS 24-7**

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Employee Settings Import Functionality

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, you can easily import these items into Systems 24-7.

Import Course Scores

The import course scores function can be used to import scores/records into Systems 24-7 for courses completed offline. There must be a course on Systems 24-7 in order to upload the record. An import is a quicker solution when more than 10 employees need to have scores added. To import scores, follow these steps.

Step 1: From the **admin** menu, select **Employee Settings**. If you do not have access to the administration section or are missing this setting, you do not have permission. Speak to your company or Systems 24-7 administrator.
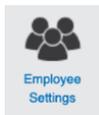
Step 2: Select **Import Course Scores** from the list of employee settings.

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.

Step 3: Select the option to **download a sample score import** and select okay. This will download a .csv file to your computer.

Step 4: Open the .csv file and complete the import sheet for the data you need to import. In order for the scores to successfully import, all information in the file needs to be accurate (and consistent with the data in Systems 24-7).

Enter in the employee's first name, last name, username (if unknown you can place the employee numbers in this field), course title (must match the course title online), date completed and percentage score. If you make errors in the first, last, username or course titles, there will be issues with being able to match scores to employees.

In the date complete column, enter in the date format in one of the following formats:

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

	A	B	C	D	E	F
1	First Name	Last Name	Username	Course Title	Date Comple	Score
2	Jane	Smith	jsmith1234	WHMIS	2020-01-31	100

Step 5: Save your .csv file.

Step 6: On Systems 24-7, select whether you want to allow duplicate scores. This means that if the user already has a record in the system, you will allow another record to replace it. Also check off whether you want to auto assign the course to the employee. This means that if the employee has not been assigned this course, by importing the score, you will assign it to their list of training.

Choose your data input options and select your course score import CSV file below:

☑ Allow Duplicate Scores?
☑ Auto Assign Course to Employee?

Step 7: Select the **date format** you selected to use in your import sheet.

Step 8: Select how you wish **to find the employee**. If you used usernames in the spreadsheet, then select username. If you chose to use employee numbers instead, then select employee number.

Course Code Platform:	Systems 24-7
Date Format:	YYYY-DD-MM
Find Employee by:	Username
Score Import File:	Browse... No file selected.

Step 9: Select the **browse** button and attach your .csv import sheet. When finished, select the import button in the lower right-hand corner.

Allow the import to run. If you have an email associated with your account, you will be emailed a copy of the report, along with any errors in being able to import the score.

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

ⓘ Download non-inserted file: ScoreListTemplate_2020-04-21_14-39-24_jwatson_15248_non-inserted.csv

Step 10: If there were issues with the import sheet, below the confirmation prompt of the import will be an alert with a .csv file of any scores that were not imported. This could be due to a typo in the first name, last name, username (or employee number), course name, etc. We recommend using the Add course scores tool to manually add scores you were unable to import.

Import Library File View/Sign-Off

The import library file view/sign-off function can be used to import views/sign-offs into Systems 24-7 for library documents loaded online. There must be a library resource on Systems 24-7 in order to upload the view/sign-off. An import is a quicker solution when more than 10 employees need to have records added. Why would you need this? Perhaps you reviewed a policy with a group of employees or maybe you posted a document on a staff board and had employees sign it after they read it. Whatever the reason, to import views/sign-offs to library resources follow these steps.

When you import a view to a library item, if there is a sign-off requirement turned on for that item, the sign-off will also be uploaded.

Step 1: From the **admin** menu, select **Employee Settings**. If you do not have access to the administration section or are missing this setting, you do not have permission. Speak to your company or Systems 24-7 administrator.
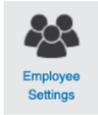
Employee Settings

Step 2: Select **Import Library File View/Signoff** from the list of employee settings.

Import Library File View/Signoff
Use this option to import "views" and sign-offs to a resource in any library.

Step 3: Select the option to **download a sample score import** and select okay. This will download a .csv file to your computer.

Click here to download a sample import csv

Choose your data input options and select your import CSV file below:

Library Type: *	Select a Library Type ▼
Service:	Select Some Options
Date Format: *	Select a date format ▼
Find Employee By:	Username ▼
Import File: *	Browse... No file selected.

Step 4: Open the .csv file and complete the import sheet for the data you need to import. In order for the views/sign-offs to successfully import, all information in the .csv file needs to be accurate (and consistent with the data in Systems 24-7).

Enter in the employee's first name, last name, username (if unknown you can place the employee numbers in this field), library header (must match the header online), resource name, and date completed. If you make errors in any of the fields, there will be issues with being able to match records to employees.

In the date complete column, enter in the date format in one of the following formats:

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

First Name	Last Name	Username	Library Header	Resource Name	Date Completed
Jane	Smith	Jsmith1234	01 Policy	Health and Safety Policy Statement	2020-01-01

Step 5: Save your .csv file.

Step 6: Select the **library type** and **service** to upload the view/sign-off to.

Library Type: *	Policies ▼
Service:	Health & Safety ✕
Date Format: *	Select a date format ▼
Find Employee By:	Username ▼
Import File: *	Browse... No file selected.

Step 7: Select the **date format** you selected to use in your import sheet.

Step 8: Select how you wish **to find the employee**. If you used usernames in the spreadsheet, then select username. If you chose to use employee numbers instead, then select employee number.

Step 9: Select the **browse** button and attach your .csv import sheet. When finished, select the import button in the lower right-hand corner.

Allow the import to run. If you have an email associated with your account, you will be emailed a copy of the report, along with any errors in being able to import the score.
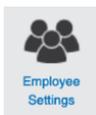

Step 10: If there were issues with the import sheet, below the confirmation prompt of the import will be an alert with a .csv file of any views/sign-offs that were not imported. This could be due to a typo in the first name, last name, etc. We recommend using the **Add Resource View** tool to manually add views you were unable to import.

Import Monthly Talk Completion

The import monthly talk completion function can be used to import the record of completion of monthly talks into Systems 24-7. There must be a monthly talk online on Systems 24-7 in order to upload the review. An import is a quicker solution when more than 10 employees need to have records added. Why would you need this? Perhaps you reviewed a monthly talk in person with a group of employees? Whatever the reason, to import a completion of a monthly talk, follow these steps.

When you import a completion, you are adding a record of the employee viewing the monthly talk, answering any related quiz questions, and completing their sign-off, if one was enabled.

Step 1: From the **admin** menu, select **Employee Settings**. If you do not have access to the administration section or are missing this setting, you do not have permission. Speak to your company or Systems 24-7 administrator.

Step 2: Select **Import Monthly Talk Completion** from the list of employee settings.

Step 3: Select the option to **download a sample score import** and select okay. This will download a .csv file to your computer.

Step 4: Open the .csv file and complete the import sheet for the data you need to import. In order for the completion to successfully import, all information in the .csv file needs to be accurate (and consistent with the data in Systems 24-7).

Enter in the employee's first name, last name, username (if unknown you can place the employee numbers in this field), monthly talk name (must match the monthly talk online), and date completed. If you make errors in any of the fields, there will be issues with being able to match completion records to employees.

In the date complete column, enter in the date format in one of the following formats:

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

First Name	Last Name	Username	Monthly Talk	Date Completed
Jane	Smith	jsmith1234	Working From Heights Safety Talk	2020-01-31

Step 5: Save your .csv file.

Step 6: Select the **date format** you selected to use in your import sheet.

Step 7: Select how you wish **to find the employee**. If you used usernames in the spreadsheet, then select username. If you chose to use employee numbers instead, then select employee number.

Date Format: *	Select a date format	▼
Find Employee By:	Username	▼
Import File: *	Browse...	No file selected.

Step 8: Select the **browse** button and attach your .csv import sheet. When finished, select the import button in the lower right-hand corner.

Allow the import to run. If you have an email associated with your account, you will be emailed a copy of the report, along with any errors in being able to import the completion record.

✓ Monthly Talk Completion import complete. 0 records added. 1 records processed.

ⓘ Download non-inserted file: MonthlyTalkCompletionListTemplate_2020-04-21_15-05-06_jwatson_15248_non-inserted.csv

Step 10: If there were issues with the import sheet, below the confirmation prompt of the import will be an alert with a .csv file of any views/sign-offs that were not imported. This could be due to a typo in the first name, last name, etc. Make any changes and re-import or use the **Add Monthly Talk View/Sign-Off** tool to manually add completion records you were unable to import.

Import Survey Completion

The import survey completion function can be used to import the completion of surveys into Systems 24-7. There must be a survey online on Systems 24-7 in order to upload the completion. To import the survey completion, follow these steps.

When you import a completion, you are adding a record of the employee completing the survey, not a record of their survey responses.
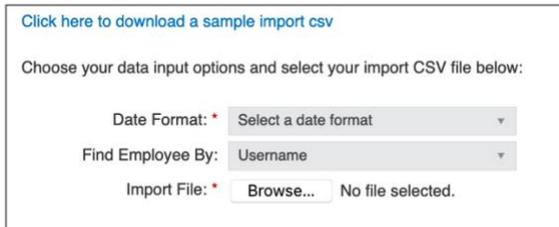
Step 1: From the **admin** menu, select **Employee Settings**. If you do not have access to the administration section or are missing this setting, you do not have permission. Speak to your company or Systems 24-7 administrator.
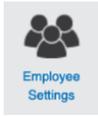
Step 2: Select **Import Survey Completion** from the list of employee settings.
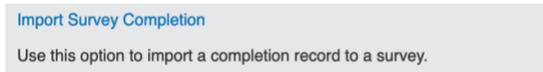
Import Survey Completion
Use this option to import a completion record to a survey.

Step 3: Select the option to **download a sample score import** and select okay. This will download a .csv file to your computer.

Click here to download a sample import csv

Choose your data input options and select your import CSV file below:

Date Format: * Select a date format
Find Employee By: Username
Import File: * Browse... No file selected.

Step 4: Open the .csv file and complete the import sheet for the data you need to import. In order for the completion to successfully import, all information in the .csv file needs to be accurate (and consistent with the data in Systems 24-7).

Enter in the employee's first name, last name, username (if unknown you can place the employee numbers in this field), survey name (must match the survey name online), and date completed. If applicable, you can also enter in company level and company entity name (ie. department and department name). If you make errors in any of the required fields, there will be issues with being able to match completion records to employees.

In the date complete column, enter in the date format in one of the following formats:

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

First Name	Last Name	Username	Survey	Date Completed	Company Level(optional, leave it empty if not applicalbe)	Company Entity(optional,
Jane	Smith	jsmith1234	Employee Satisfaction Survey	2020/02/31		

Step 5: Save your .csv file.

Step 6: On Systems 24-7 Select the **date format** you selected to use in your import sheet.

Step 7: Select how you wish **to find the employee**. If you used usernames in the spreadsheet, then select username. If you chose to use employee numbers instead, then select employee number.

Date Format: * Select a date format
Find Employee By: Username
Import File: * Browse... No file selected.
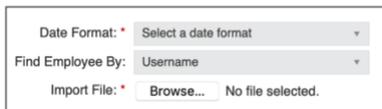
Step 8: Select the **browse** button and attach your .csv import sheet. When finished, select the import button in the lower right-hand corner.

Allow the import to run. If you have an email associated with your account, you will be emailed a copy of the report, along with any errors in being able to import the completion record.

> ✓ Survey Completion import complete. 0 records added. 1 records processed.

> ℹ Download non-inserted file: SurveyCompletionListTemplate_2020-04-21_15-25-20_jwatson_15248_non-inserted.csv

Step 9: If there were issues with the import sheet, below the confirmation prompt of the import will be an alert with a .csv file of any records that were not imported. This could be due to a typo in the first name, last name, etc. Make the corrections and re-import.