Clinical Learning Australia™

Quick Reference Guide

# Clinical
# LEARNING
# Australia
## The ePortfolio for **prevocational doctors**

# HOW TO IMPORT USERS IN BULK

This Quick Reference Guide provides information on how to import users into Clinical Learning Australia in bulk. This guide will explain what information is required and optional data that can be associated with a user account.
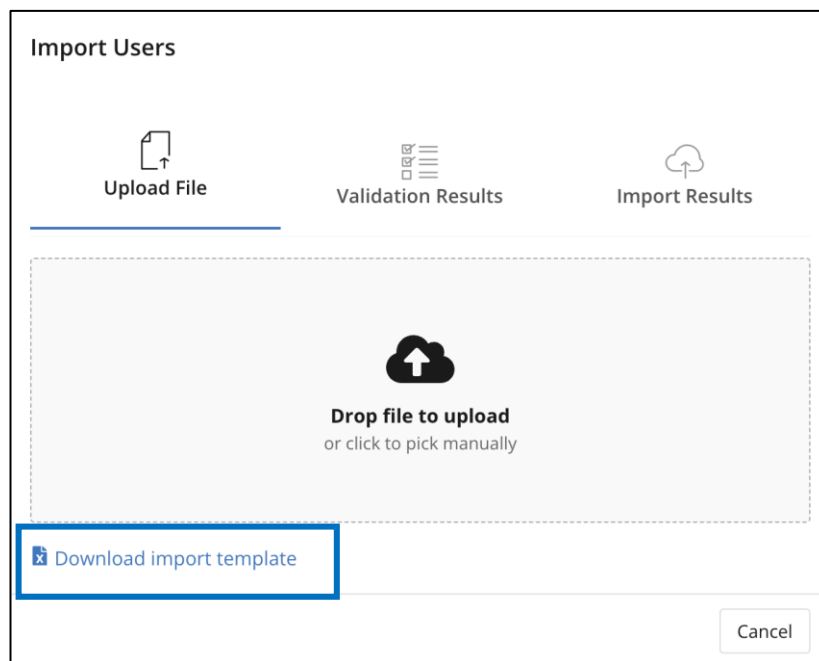
# 1 Where to Import Users in Bulk

Medical Education Unit / Admin users of Clinical Learning Australia can import users in bulk via a user import spreadsheet.

- Navigate to the 'cog' icon on the left-hand menu bar and click 'Users'
- Click the button 'Import' Users
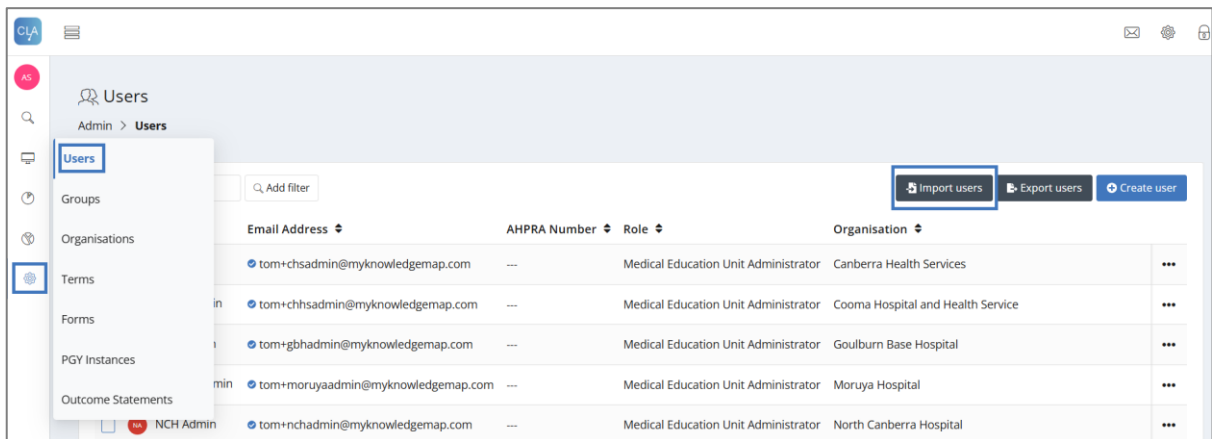


A pop-up box will appear with the option to 'Download import template' – click on this.
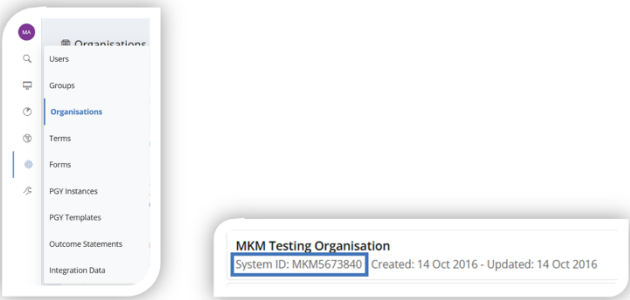


This will download an excel spreadsheet in which you can enter user details in bulk.

## 2 Completing the User Import Spreadsheet

Complete the below fields in the spreadsheet ensuring you enter each user on a different row.

| A | B | C | D | E | F | G | H | I |
|---|---|---|---|---|---|---|---|---|
| UserIdentifier | FirstName(en-GB) | LastName(en-GB) | Email | OrgReference | MainRole | UserStatusName | ExternalIdentifier | Reference |
| | | | | | | | | |
| | | | | | | | | |

| J | K | L | M | N | O |
|---|---|---|---|---|---|
| Facility(en-GB) | Hospital and Health Service(en-GB) | Jurisdiction(en-GB) | Phone(en-GB) | SendVerification | GroupReference1 |
| | | | | | |
| | | | | | |

| Field Name | Field Description | Field Type |
|---|---|---|
| **UserIdentifier** | • This field is only required if you are updating a user account that already exists, it can remain blank if you are creating a new user.<br><br>• Where you are updating a user account that already include the existing users email address in this field. | Optional |
| **FirstName** | • Enter the user's first name. | Mandatory |
| **LastName** | • Enter the user's last name. | Mandatory |
| **Email** | • Enter the user's email address.<br><br>• This should be their professional email address and will be their username to login to Clinical Learning Australia. | Mandatory |
| **OrgReference** | • This reference links a user to a specific organisation in Clinical Learning Australia.<br><br>• The organisation a user is linked to should be relevant to their role and the organisation(s) that they have permission to access information for.<br><br>• You will need to enter the relevant Clinical Learning Australia reference number for the organisation that you want to link the user to.<br><br>• This reference can be found within the '*Organisations*' area of the administration panel.<br><br>• Navigate to the 'cog' icon on the administrator menu bar and click 'Organisations'.<br><br>• Find the organisation that you want to link the users to.<br><br>• Below the heading of each organisation is a '*System ID*', copy this reference and enter it into the '*OrgReference*' column in the upload spreadsheet (see screen shot below). | Mandatory |

| | | |
|---|---|---|
| **MainRole** | • This is the role that will be associated with a user. Different roles have different permissions to perform functions within Clinical Learning Australia.<br>• The following roles are available to assign users to:<br>    ○ Medical Education Unit Administrator<br>    ○ Director of Clinical Training<br>    ○ Medical Education Officer<br>    ○ Trainee›<br>    ○ Term Supervisor<br>    ○ Clinical Supervisor<br>• View the *Clinical Learning Australia Administrator User Guide* for more information on what each tole can do in Clinical Learning Australia**.**<br>• **NOTE. Role names must be written into the spreadsheet using the exact names above.** | Mandatory |
| **UserStatusName** | • This field can be left blank. | Not Required |
| **ExternalIdentifier** | • This is the AHPRA Registration Number that is for any healthcare practitioner who is registered to practice in Australia.<br>• This is not a mandatory field but should be entered for all medical professionals using the system (i.e. PGY doctors, supervisors, Directors of Clinical Training etc.) where it is known. | Optional |
| **Reference** | • This field is not relevant to Clinical Learning Australia and can be left blank. | Not Required |
| **Facility**<br>**Hospital and Health Service**<br>**Jurisdiction** | • These fields are only relevant if you wish to include further information in a user's profile to help identify that user, e.g. states who manage admin users centrally, may want a quick reference to the hospital, facility, health service they reside within.<br>• Note that the jurisdiction should be formatted as the state/territory abbreviation, e.g. NSW, WA etc. | Optional |
| **Phone** | • A phone number can be provided for a user if required.<br>• This field is not mandatory. | Optional |

| | | |
|---|---|---|
| **SendVerification** | • This field is to identify if you want a welcome email to be sent to new users immediately upon setting up their account via bulk upload.<br><br>• By default, this is set to '*false*', meaning a welcome email won't be sent at the point of importing the users if the field is left blank.<br><br>• Any users who don't have a welcome email sent straight away can be sent it in the future when required.<br><br>• If you wish to send welcome emails at the point of importing users, you should put '*true*' in this column. | Optional |
| **GroupReference** | • This is a specific identifier for a group that already exists within the system that you want to add users<br><br>• Admin users can create groups as required to manage trainees within their hospital or health service.<br><br>• A group can be named anything relevant to that training provider or location and creates an association between a number of different users to, e.g. a group may be named 'Hospital X PGY1 Trainees – 2024'<br><br>• Refer to the *Clinical Learning Australia Administrator User Guide* for more information on groups.<br><br>• This is not a mandatory field and can be left blank but users created through this process will need to be added to a group later within the system.<br><br>• **NOTE.** A group must exist before you can add users to it. It is recommended when uploading users in bulk to first create the relevant group in the *'Groups'* area of the system and then use the bulk upload process to assign users to that group.<br><br>• The GroupReference to be included in the upload spreadsheet can be found within the '*Groups*' area of the administration panel, this is the '*System ID'*. Identify the relevant system ID for the group you want to assign users to and copy this into The Group Reference field of the spreadsheet. | Optional |

## 3 Uploading the User Import Spreadsheet

Once you have completed the user import spreadsheet save it to your desktop or another local file location. Navigate back to the Users / Import users screen and click the 'Drop file to upload' icon to upload your file. Once you file has been successfully uploaded the relevant user profiles will set up in the system.