

Clinical Learning Australia
Training Guide



QUICK REFERENCE GUIDE FOR
CLA ADMINISTRATORS

CREATING AND MANAGING GROUPS

This quick reference guide provides information on how to create and manage groups in Clinical Learning Australia (CLA). This guide will explain the process to follow for creating groups and how to manage them once created.

Table of Contents

1	CREATING GROUPS	3
1.1	CREATING GROUPS MANUALLY	3
	Where to create groups manually	3
	Inputting group details	4
	Adding users to a group.....	6
1.2	CREATING GROUPS IN BULK	9
	Where to create groups in bulk.....	9
	Completing the Group Import Spreadsheet.....	10
	Uploading the Group Import Spreadsheet	11
	Data validation.....	12
2	MANAGING GROUPS	14
	Where to manage groups.....	14
	Deleting and archiving groups	18
	Bulk actions.....	19
3	SUPPORT	21

1 Creating groups

Medical Education Unit / Administrator users of CLA can create groups either manually (one-by-one) in the system or in bulk via a **group import spreadsheet**.

The main type of group you will need to create is a **'Cohort'** group. A cohort group is a group of Postgraduate Year (PGY) trainees that will be progressing through the training program together i.e. 2025 PGY1, 2025 PGY2¹.

Cohort groups are required to link a group of prevocational doctors to a PGY Instance that associates them with the required assessment forms and the number of terms that they are undertaking.

You will need to create a group for each PGY cohort of doctors that you have per clinical year. That means, you will need to create a cohort group for PGY1 doctors and a separate group for PGY2 doctors.

If you also run a mixture of 4-term and 5-term clinical years, it is recommended to create separate cohort groups for these as well. That is a group for PGY1 4-term doctors, PGY1 5-term doctors, PGY2 4-term doctors and PGY2 5-term doctors.

You will need to repeat this step at the start of each clinical year and create new cohort groups for incoming PGY1 doctors and those progressing to PGY2.

1.1 Creating groups manually

Where to create groups manually

- Navigate to the 'cog' icon on the left-hand menu bar and click **'Groups'**
- Click the **'Create group'** button

¹ Note that individuals within a cohort group can have different start and end dates for their PGY year and/or terms but will generally be the group of trainees that are progressing through PGY1 or PGY2 terms in any given year.

	System ID	Type	Organisation	Start Date	End Date	Users	Created	
Testing PGY1	AMC0748535	Cohort	Canberra Health Services	31 Dec 2023	30 Dec 2024	42	13 Sep 2024	...
1	AMC0000002	Cohort	South East Regional Hospital	1 Jan 2024	31 Dec 2025	5	19 Jun 2024	...
2	AMC0000001	Cohort	Network 1	1 Sep 2024	31 Dec 2025	9	19 Dec 2023	...
3	AMC0000003	Cohort	Top End Region	1 Jan 2024	31 Dec 2025	12	19 Jun 2024	...
amc-group 4	AMC0000004	Cohort	Example MEU	1 Jan 2024	31 Dec 2025	8	19 Jun 2024	...
amc-group 5	AMC0000005	Cohort	Barossa Hills Fleurieu Local Health Network BHFLHN	1 Jan 2024	31 Dec 2025	6	19 Jun 2024	...
amc-group 6	AMC0000006	Cohort	WA Country Health Service	1 Jan 2024	31 Dec 2025	8	19 Jun 2024	...
amc-group 7	AMC0000007	Cohort	Royal Hobart Hospital	1 Jan 2024	31 Dec 2025	9	19 Jun 2024	...

A window will then pop up to allow a Group's details to be entered.

Inputting group details

- Complete the fields shown below ensuring you enter data in all mandatory fields as a minimum.
- Anything with a (*) is a mandatory field.
- Users can be added as part of the Group creation process if they already exist in CLA or at a later time if they have not been added to CLA yet.
- Click **Create** when you have finished entering all the data.

Create Group

Basic Info

Organisation *

Type: Group

Name *

Description

Start Date End Date

Add a new user...

You have yet to assign any users.

The table below explains each of the fields within the group creation window.

Field name	Description	Field Type
Organisation*	<ul style="list-style-type: none"> Search and select the organisation to which the group will be attached. A minimum of 3 characters must be entered to populate results. Note: You can only select the organisation your user account is attached to or any sub-organisations that sit beneath this in the organisational hierarchy. 	Mandatory
Type	<p>There are two options for group type; Cohort and Group.</p> <ul style="list-style-type: none"> Cohort is used to group together Trainee users usually by year group, along with relevant Directors of Clinical Training / Executive Directors of Medical Services. This group type is used to group trainees as PGY1 or PGY2 trainees. Group is a more generic group type and is available in the event you want to group users together for any other reason. <p>Note: Although adding Group Type is optional, please ensure the group type of Cohort is selected when creating Trainee groups.</p>	Optional

Name*	<p>You can choose to enter any name for the group you are creating. It is recommended that Cohort groups are named in such a way as to identify the primary organisation or facility responsible for management of training, the PGY year and the year in which training is occurring.</p> <p>Some example Group names are noted below:</p> <ul style="list-style-type: none"> • State/Territory – PGY1 – 2025 – this would be to group all 2025 PGY1 trainees in a state together • Hospital X – PGY1 – 2025 – this would be to group all PGY1 trainees from a particular hospital/facility together • Network A – PGY1 – 2025 – this would be to this would be to group all PGY1 trainees across a network of hospitals/facilities together • Network A – PGY1 (5-term) – 2025 – this would be to group together all PGY1 trainees that are doing a 5-term clinical year across a network of hospitals/facilities. You only need to add this if you are running both 4 and 5-term clinical years. <p>How you name groups will depend on how training is managed in your particular state/territory. CLA is designed to provide flexibility to accommodate a range of different models.</p>	Mandatory
Description	<ul style="list-style-type: none"> • You can provide any additional information related to the group you are creating if relevant. • Note: This isn't used anywhere within the system apart from when viewing that particular group. 	Optional
Start / End Date	<ul style="list-style-type: none"> • This is the date range for when a group will start and end. • Note: Although this is optional, it is recommended to input a start and end date as it defines how long a group is active for and also provides benefit when running reports and only wanting to see data within the system between certain points in time. 	Optional

Adding users to a group

Users can be added to groups during the process of creating a group if they already exist in CLA.

- Type the user's name or email address in the text box to the right of the group creation window.

Note: You must type a minimum of 3 characters to populate results.

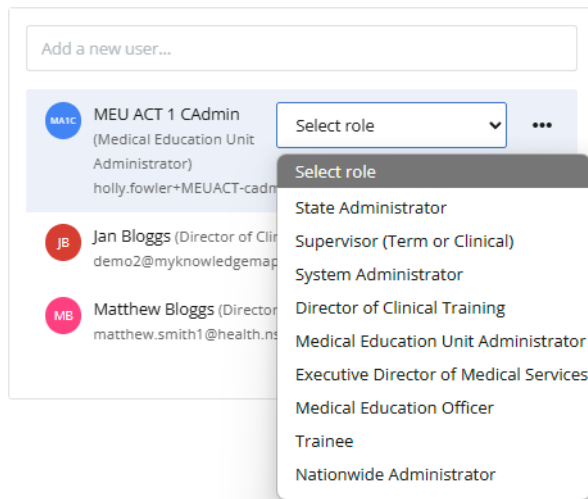
The screenshot shows the 'Create Group' form with the 'Basic Info' tab selected. The form fields are: Organisation (Canberra Region Medical Education Council (CRMEC)), Type (Cohort), Name (Example Group), Description (empty), Start Date (01/01/2025), and End Date (01/01/2026). A search input field contains the text 'holly', and a dropdown menu displays a list of users with their names and email addresses. The first user, Teddy Altman, is highlighted in blue. At the bottom right, there are 'Cancel' and 'Create' buttons.

- Click on the user you want to add and this will add them to the group.
- **Note:** A user isn't fully added to the group until you click the **create** button.

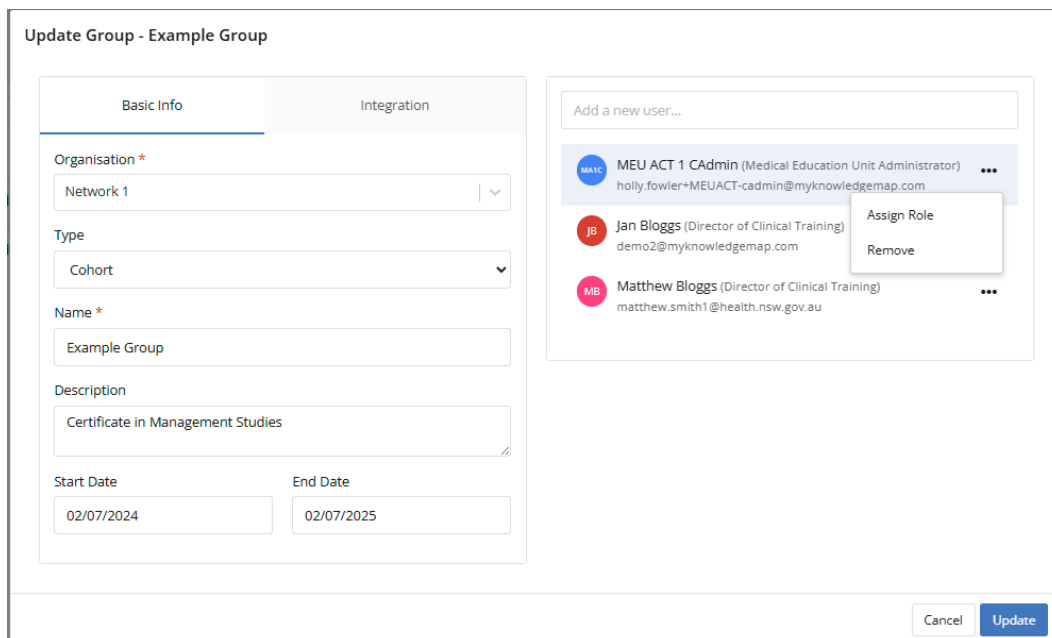
The screenshot shows the 'Create Group' form with the 'Basic Info' tab selected. The form fields are: Organisation (Canberra Region Medical Education Council (CRMEC)), Type (Cohort), Name (Example Group), Description (empty), Start Date (01/01/2025), and End Date (01/01/2026). A search input field contains the text 'Add a new user...'. Below the search field, a user card for 'Teddy Altman (Trainee)' is displayed, showing a red circular profile picture with the initials 'TA' and the email address 'holly.fowler+clat16@myknowledgemap.com'. At the bottom right, there are 'Cancel' and 'Create' buttons.

- **Note:** As well as adding Trainees to a cohort group, you will need to add the Director(s) of Clinical Training (DCT) and/or Executive Director(s) of Medical Services (EDMS) users to the **cohort** group. This will ensure these roles have access to the relevant trainees to view and track training progress. Add the DCT/EDMS roles in the same way as you add Trainees

- If you have an MEU Administrator or other user who needs DCT or EDMS privileges in addition to their main role, you can add these users to the group in the way and assign them the DCT/EDMS role within that group.
 - Click on the 3 dots to the right of the user's name and select **Assign Role**.
 - Select *Director of Clinical Training* or *Executive Director of Medical Services* as appropriate.
 - Repeat this step for all Groups that the user(s) requires DCT/EDMS access to.
 - Click **Update** to save changes.



- **Note:** You do not need to add roles for Trainees or users with the correct Main role (their primary role in CLA as set up in Users).
- If you click on the wrong user, just click on the 3 dots to the right of the user's name and select **Remove**.



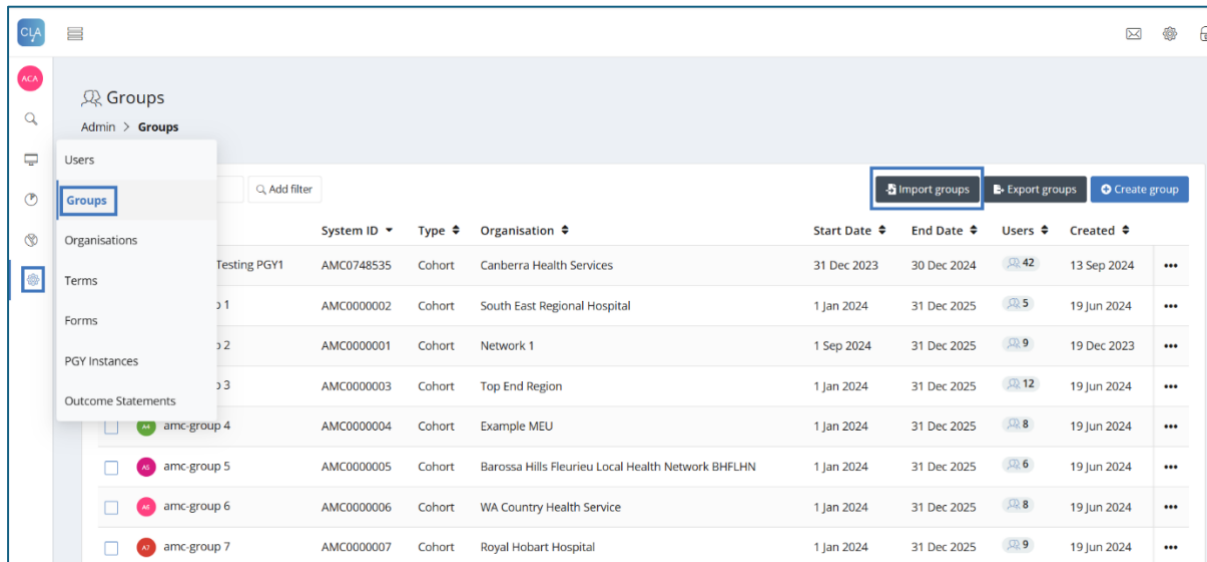
Users can also be added to groups during the user creation process. **Note:** This is the recommended way of adding users to **cohort** groups. Please refer to [Creating and managing users](#) quick reference guide for more information.

1.2 Creating groups in bulk

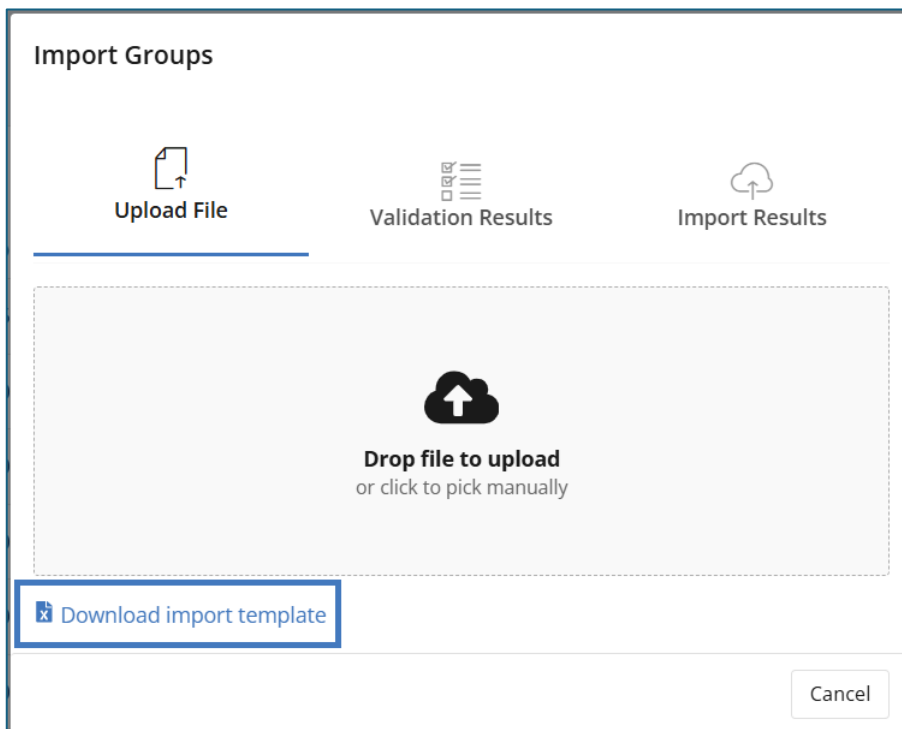
Creating groups in bulk can be done by filling out and uploading of a spreadsheet.

Where to create groups in bulk

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



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

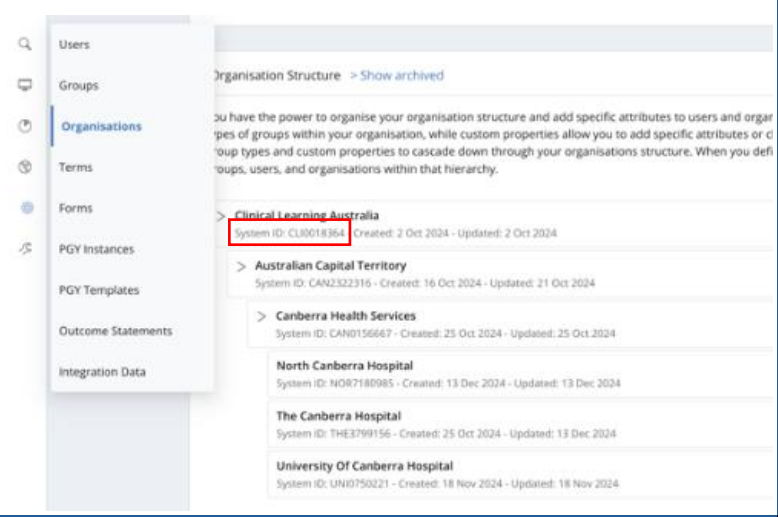


This will download an excel spreadsheet which you can use to enter group details in bulk.

Completing the Group Import Spreadsheet

Complete the below fields in the spreadsheet ensuring all mandatory fields are complete before uploading. All mandatory columns are highlighted in **bold**.

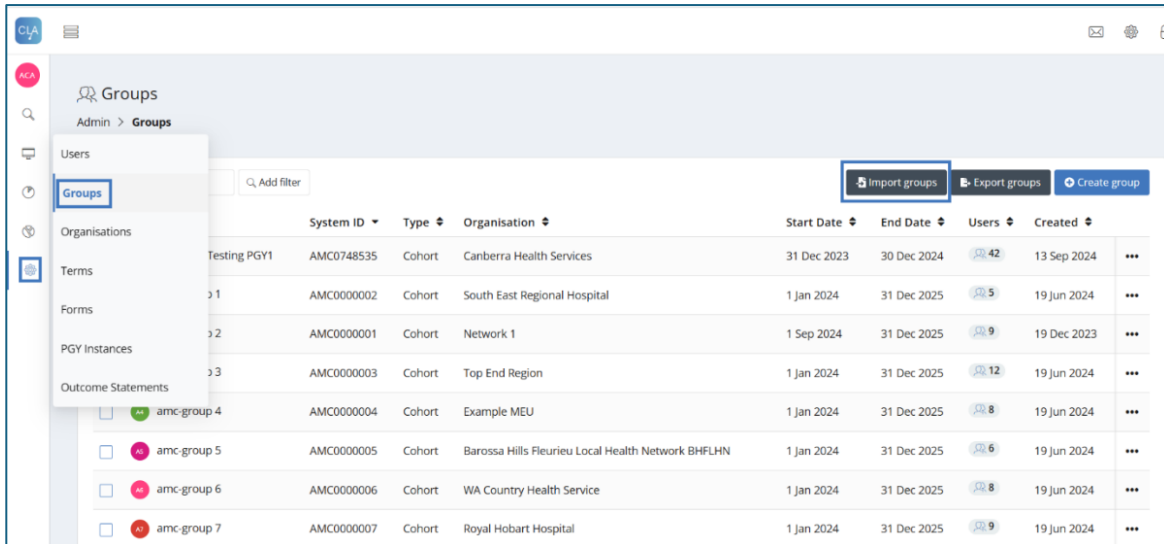
GroupIdentifier	Name(en-GB)	Description(en-GB)	StartDate	EndDate	OrgReference	GroupTypeName
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GroupIdentifier	This only needs to be entered if you are updating details of a group that already exists in the system. If you are creating a new group leave this blank.	Optional
Name*	This is the name that you want to apply to the new group you are creating. See Inputting group details above for more information on naming conventions for groups.	Mandatory
Description	Provide any additional information related to the group you are creating if relevant.	Optional
StartDate EndDate	This is the start and end date for when the group will be used. Note: Although this is optional, it is recommended to input a start and end date as it defines how long a group is active for and provides benefit when running reports and only wanting to see data within the system between certain points in time.	Optional
OrgReference*	This is the SystemID for the organisation (i.e. network, facility, hospital) that the group will be attached to. You can find this in the 'Organisations' area of the system by clicking on the cog icon in the side toolbar and clicking 'Organisations'. Copy and paste the SystemID for the organisation that you want the group to belong to. 	Mandatory
GroupTypeName	Enter Cohort where you are creating a group of Trainees or Group for any other type of group.	Optional

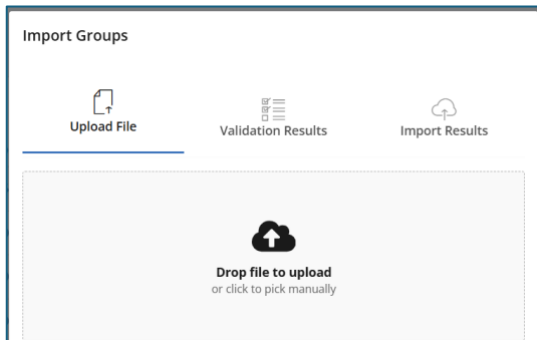
Note: Although this is optional, please ensure the group type of **Cohort** is entered here when creating Trainee groups.

Uploading the Group Import Spreadsheet

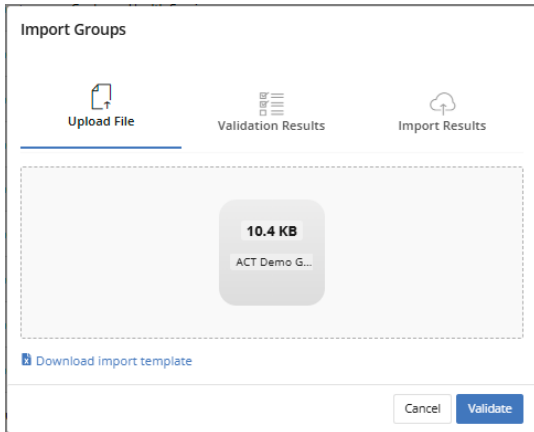
Once you have completed the group import spreadsheet save it to your desktop or another local file location. Navigate back to the **Groups** screen in CLA and click **Import Groups**.



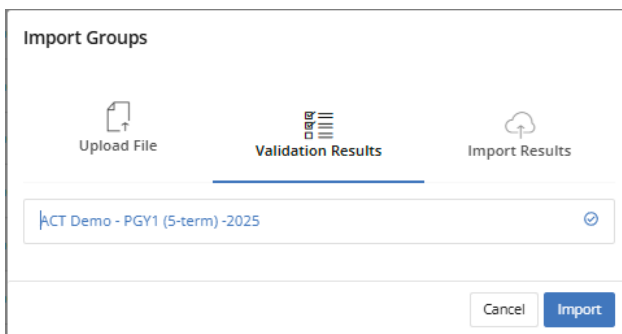
Click the 'Drop file to upload' icon to upload your file.



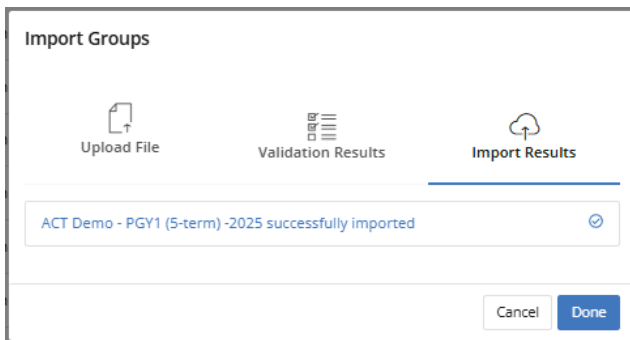
The screen will display the size and name of the file you are importing. Click **Validate**.



If there are no issues with the data, the file name will be displayed with a blue tick. Click **Import**.



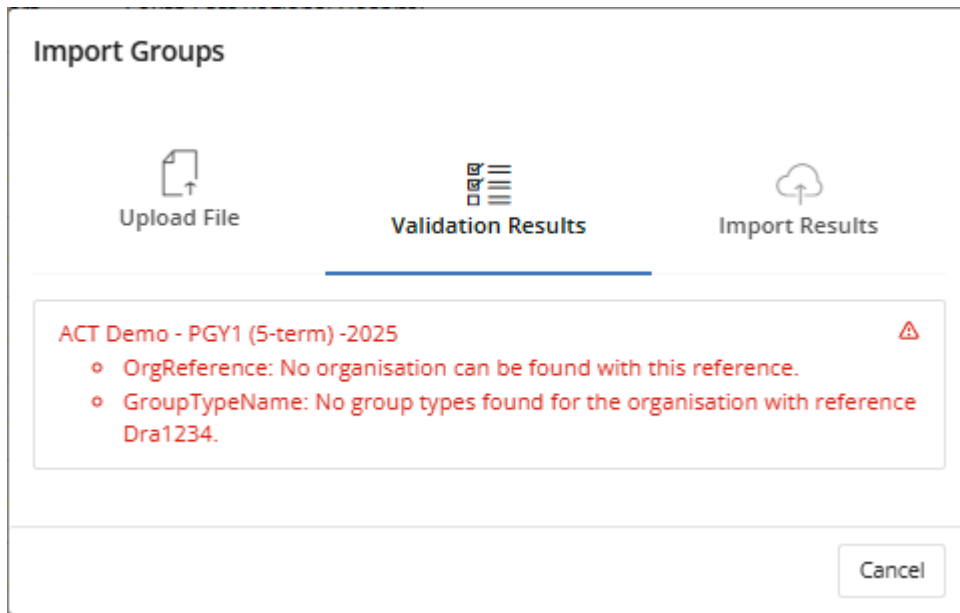
You will see a notification that the data has been successfully imported. Click **Done**.



The data in the spreadsheet has been successfully uploaded and the relevant groups have been set up in the system.

Data validation

The data in your spreadsheet undergoes a validation process as part of the data upload process. If there are any errors with the data being uploaded, for instance incorrect OrgReference, or duplicate group name, or invalid Group Type, these will be flagged on the screen for review.

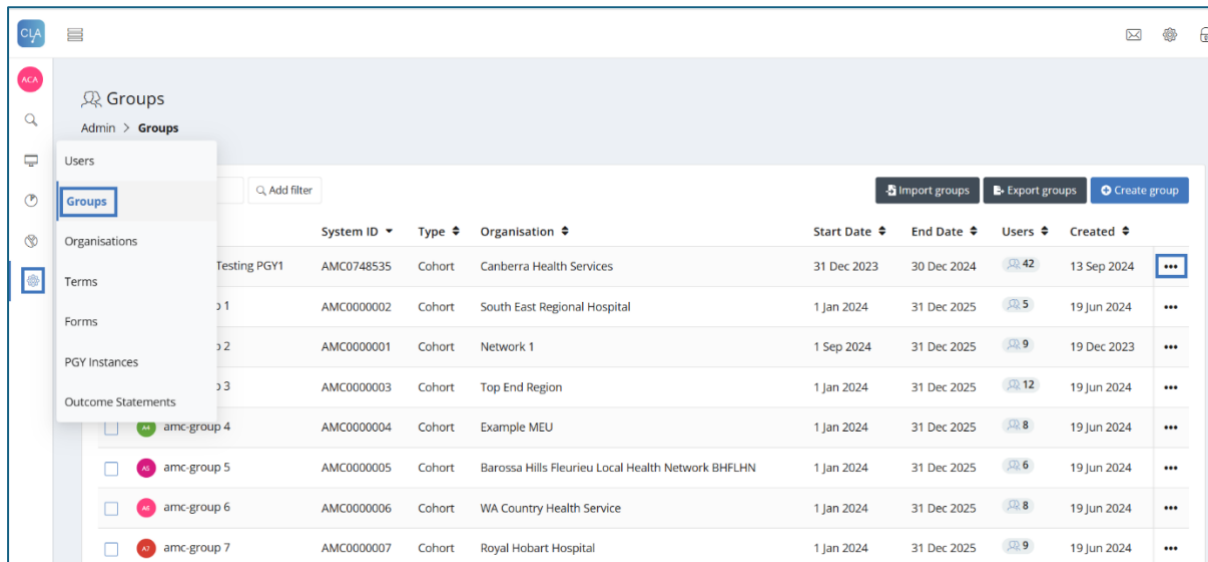


Review your group import spreadsheet, make necessary corrections, save the latest version and try to upload again.

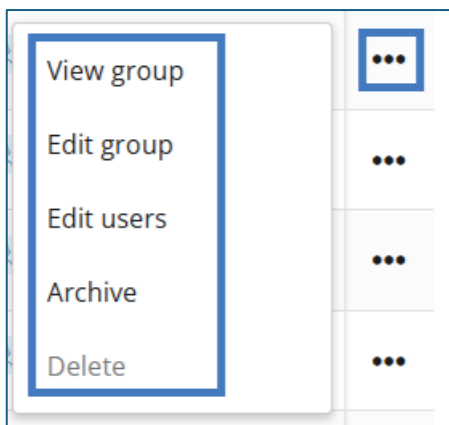
2 Managing groups

Where to manage groups

- Navigate to the 'cog' icon on the left-hand menu bar and click '**Groups**'
- Click the **three dots (...)** to the far right of the group's details



Clicking this will display a pop-up menu of options.



View Group - Administrators can view an overview of a group's details here.

CLA Clinical Learning Australia (PGY2) -Training Group
(CLA9009778)

Overview Users (11)

TYPE	ORGANISATION
Cohort	Clinical Learning Australia
START DATE	END DATE
1 Nov 2024	1 Nov 2025
CREATED	UPDATED
18 Nov 2024 17:19	26 Nov 2024 06:28

View the user's linked to the group directly from this view by clicking the **Users** tab.

CJ2 Canberra January 25 Intake (CAN3174595)
Cohort Group

Overview Users (4)

- TA
Teddy Altman (Trainee)
 holly.fowler+clat16@myknowledgemap.com
- IS
Izzie Stevens (Trainee)
 holly.fowler+clat12@myknowledgemap.com
- RW
Richard Webb (Trainee)
 holly.fowler+clat13@myknowledgemap.com
- JW
Jo Wilson (Trainee)
 holly.fowler+clat15@myknowledgemap.com

Edit Group - Administrators can edit a group's **Basic Information** in the first tab, for instance the Group Name.

Update Group - Clinical Learning Australia (PGY2) -Training Group

Basic Info | Integration

Organisation *
Clinical Learning Australia

Type
Cohort

Name *
Clinical Learning Australia (PGY2) -Training Group

Description

Start Date: 01/11/2024 | End Date: 01/11/2025

Add a new user...

- Teddy Altman (Trainee) holly.fowler+clat16@myknowledgemap.com
- Catherine Avery (Trainee) holly.fowler+clat20@myknowledgemap.com
- Jackson Avery (Trainee) holly.fowler+clat19@myknowledgemap.com
- Miranda Bailey (Trainee) holly.fowler+clat9@myknowledgemap.com
- Ellis Grey (Trainee) holly.fowler+clat18@myknowledgemap.com

« (1 2 3) »

Cancel Update

Administrators can also view the **Users** that are a member of the group. Users can be added to a group from this view by searching and selecting the required user.

Update Group - Clinical Learning Australia (PGY2) -Training Group

Basic Info | Integration

Organisation *
Clinical Learning Australia

Type
Cohort

Name *
Clinical Learning Australia (PGY2) -Training Group

Description

Start Date: 01/11/2024 | End Date: 01/11/2025

Search: joe bloggs - (joe.bloggs@example.com)

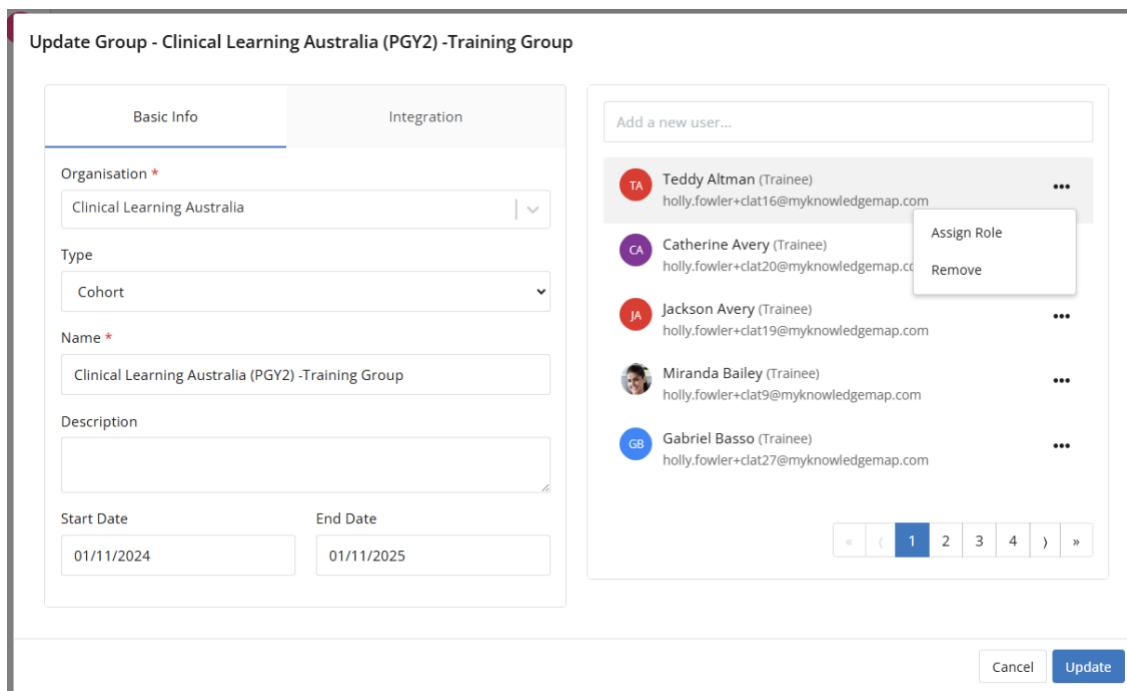
- Joe Bloggs - (joe.bloggs@example.com)
- Joe Bloggs - (holly.fowler+termsupervisor1@myknowledgemap.com)
- Joe Bloggs - (Joe.Bloggs@work.com.au)
- Joe Bloggs - (joe@example.com)

- Jackson Avery (Trainee) holly.fowler+clat19@myknowledgemap.com
- Miranda Bailey (Trainee) holly.fowler+clat9@myknowledgemap.com
- Ellis Grey (Trainee) holly.fowler+clat18@myknowledgemap.com

« (1 2 3) »

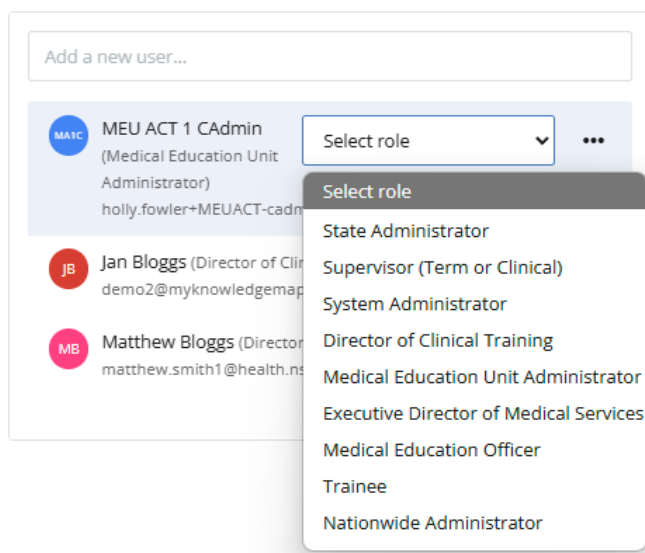
Cancel Update

Roles assigned to users in relation to this groups can be changed, and users can be removed from a group by clicking the **three dots (...)** to the right of the user's name. Click **Assign Role** or **Remove** as required.



If you select **Assign Role**, a dropdown box of available roles is displayed. Select the required role and click **Update**. Use this to assign users with a non-DCT main role to be a DCT for trainees within the groups, e.g. a user that is both an MEU Administrator and DCT.

Note: You do not need to add roles for Trainee users.

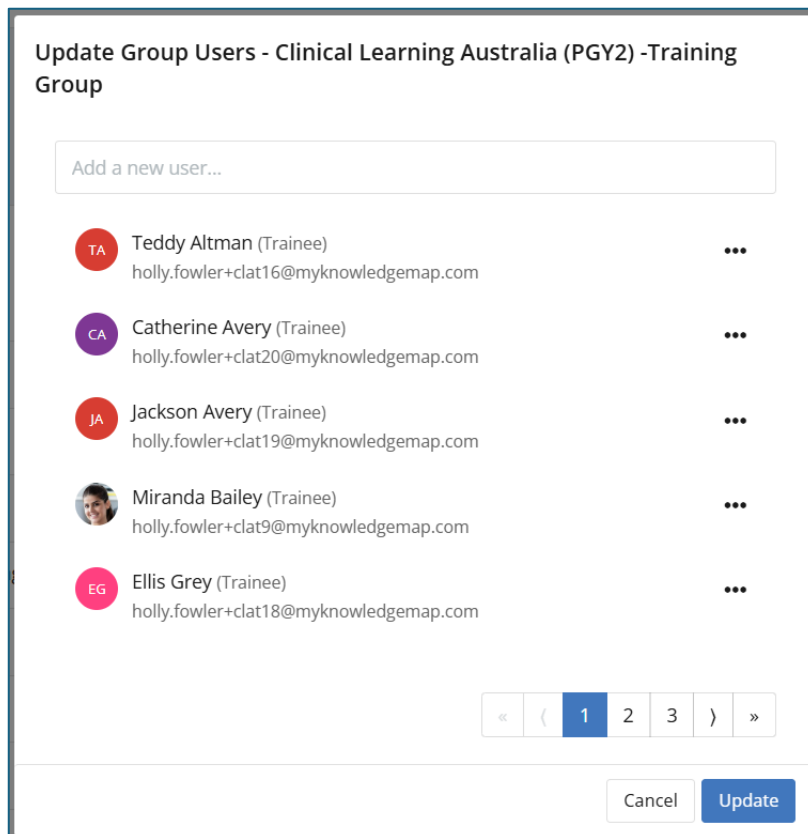


To remove the assigned role, click on the three dots to the right of the user and select **Remove Role**.

Edit Users - Administrators can also edit the users attached to a group by using the **Edit Users** option.

You will follow the same process for adding users, assigning roles and removing users as described above.

Use the Search field to add new users and click on the three dots to the right of a user to assign a role or remove.



Deleting and archiving groups

Administrators can delete a group if there are no assigned users or if assigned users have not yet logged into CLA. Once users have logged in, the option to delete the group will be greyed out.

Administrators can archive a group at any time by clicking the **three dots (...)** and select **Archive**.

Note: Use care when Archiving Groups and do not archive groups where trainees are currently on clinical terms. If you archive a group during a clinical year where trainees are allocated to terms, it will remove the trainees from all dashboards and they will no longer be visible to DCTs and EDMS'. Trainees will lose their view of the ePortfolios when they login – they will be able to access forms through workarounds.

Administrators can view archived groups by clicking **Show archived** (located at the bottom of the groups page).

Showing 1 to 10 of 10 > [Show archived](#) 1 10 per page

Archived groups will appear in the group list with a yellow tag, 'Archived.' To hide archived users from the list, click **Hide archived**.

Group9 Archived GRO0000003 Cohort South East Regional Hospital 15 Jul 2024 15 Jul 2025 3

If you want to unarchive a group, click on the **three dots (...)** and select **Unarchive** for the group that is tagged as **Archived**. This will reinstate the group and relevant visibility for all users that previously had permission to view information for that group.

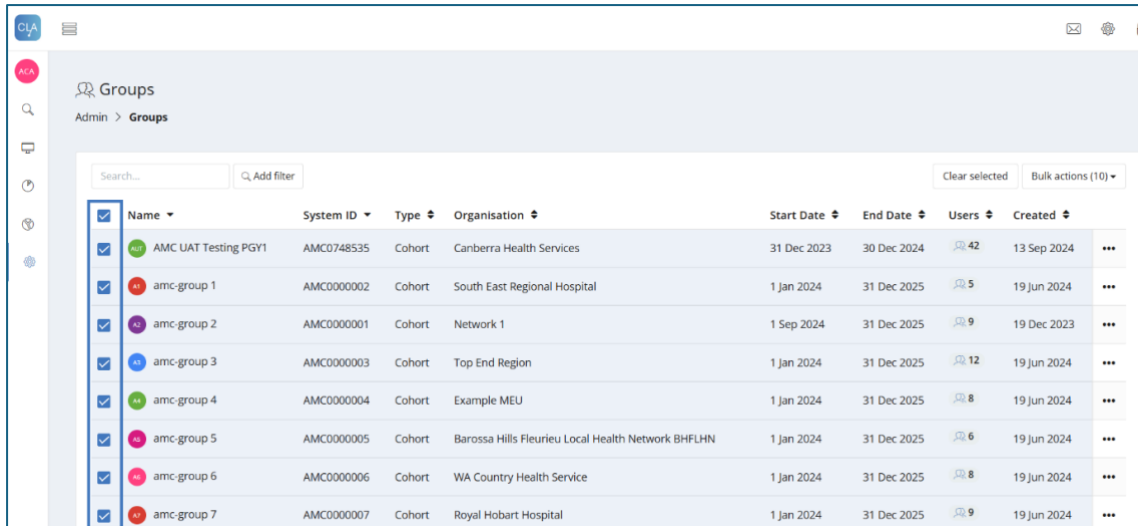
Bulk actions

Administrators can apply actions to multiple selected groups by first selecting the groups that changes need to be applied to, this is done by clicking the tick-box to the left of the **Name** column and clicking **Bulk actions** on the far-right hand side of the page above the table of groups.

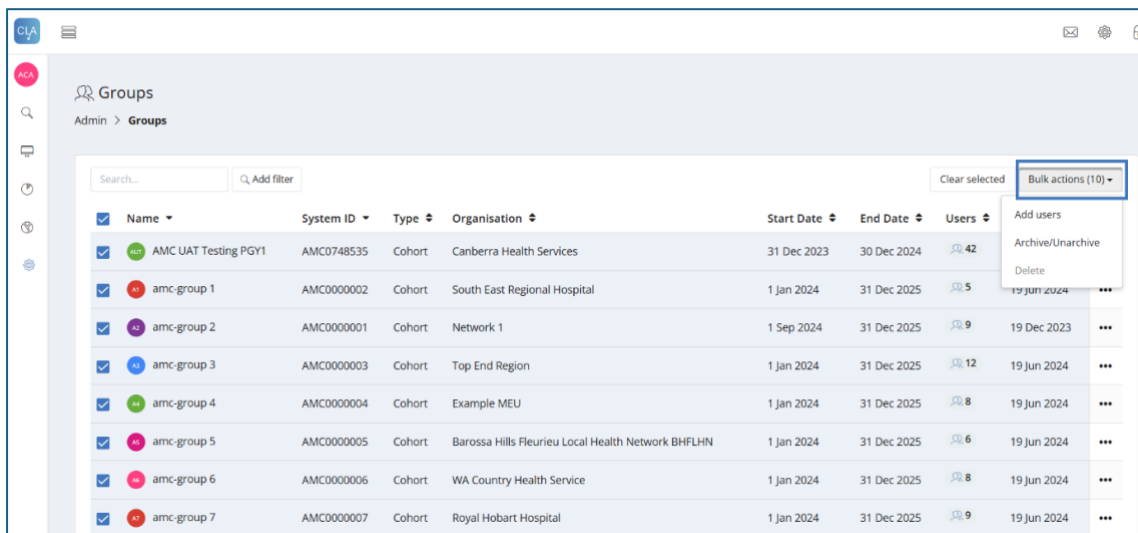
The screenshot shows the 'Groups' management page. At the top, there is a search bar and a 'Bulk actions (1)' dropdown menu. Below this is a table with the following columns: Name, System ID, Type, Organisation, Start Date, End Date, Users, and Created. The first row, 'Canberra January 25 Intake', is selected, and the 'Bulk actions' dropdown is open, showing 'Unarchive' as the selected option.

Name	System ID	Type	Organisation	Start Date	End Date	Users	Created
<input checked="" type="checkbox"/> Canberra January 25 Intake	CAN3174595	Cohort	North Canberra Hospital	1 Jan 2025	31 Dec 2025	4	3 Dec 2024
<input type="checkbox"/> Canberra September 24 Intake	CAN9844881	Cohort	North Canberra Hospital	1 Dec 2024	31 Dec 2025	0	3 Dec 2024
<input type="checkbox"/> Canberra Test	CAN0547987	Cohort	North Canberra Hospital	3 Dec 2024	31 Dec 2025	1	3 Dec 2024
<input type="checkbox"/> Clinical Learning Australia (PGY2) -Training Group	CLA9009778	Cohort	Clinical Learning Australia	1 Nov 2024	1 Nov 2025	11	18 Nov 2024
<input type="checkbox"/> Demonstration Group	CER0000001	Cohort	Top End Region	26 Jun 2024	26 Jun 2025	1	26 Jun 2024
<input type="checkbox"/> Example Group	CER0000002	Cohort	Network 1	2 Jul 2024	2 Jul 2025	2	2 Jul 2024
<input type="checkbox"/> Example MEU - SA 1	EXA0000001	Cohort	Barossa Hills Fleurieu Local Health Network BHFLHN	29 Jul 2024	29 Jul 2025	3	29 Jul 2024
<input type="checkbox"/> Gotham City Villains	GOT0000001	Cohort	Network 1	28 Jun 2024	28 Jun 2025	3	28 Jun 2024

Alternatively, you can select all groups on the current page displayed by clicking the main tick-box to the left of the **Name** column in the heading row.



Once you select the relevant groups you want to make changes to, you then need to select **Bulk action** on the far-right side of the page and choose from one of the following options:

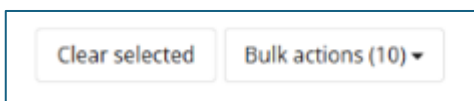


Add users - To add users to the group(s), click **Add users**, search for and select users and click to add them to the group.

Archive/Unarchive - To archive or unarchive the group(s), click **Archive/Unarchive**. A confirmation dialogue box will appear. Click **OK** to proceed.

Delete - To delete the group(s), click **Delete**. A confirmation dialogue box will appear. Click **OK** to proceed. This is subject to the Delete limitations noted previously of users in a group not having logged into CLA previously.

Note: You will see how many groups have been selected in brackets (**NUMBER**) to the right of the **Bulk actions** button.



3 Support

If you require any support you can find contact details for the national CLA system administrator as well as relevant state based system administrators on the [CLA website](#).