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 (CLA) in bulk. This guide will explain what information is required and optional data that can be associated with a user account.
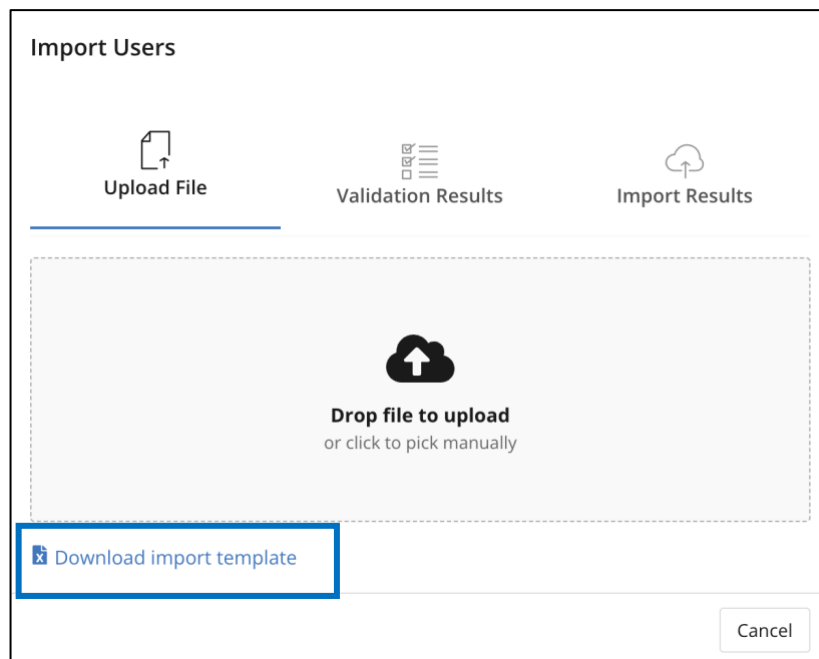
1 Where to Import Users in Bulk

Medical Education Unit / Admin users of CLA 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 'Import users' button
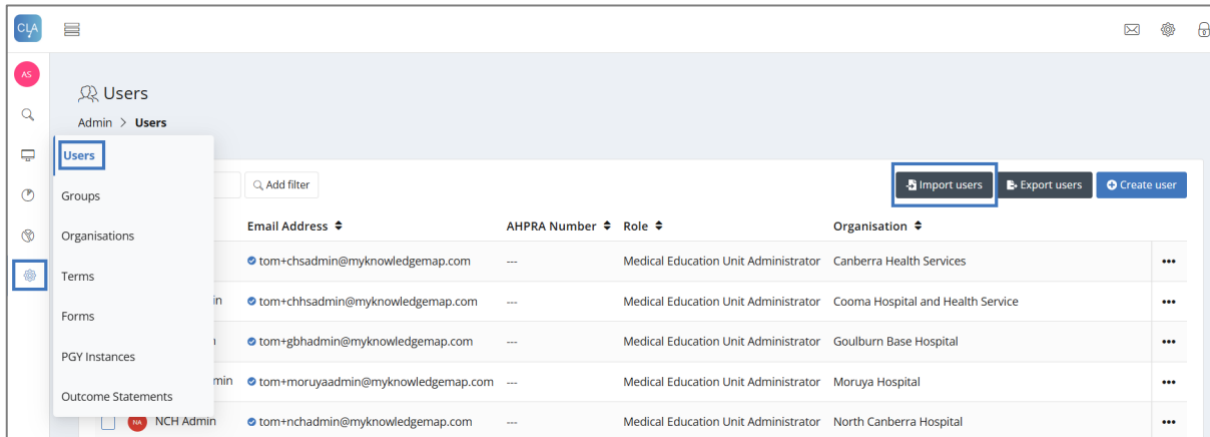
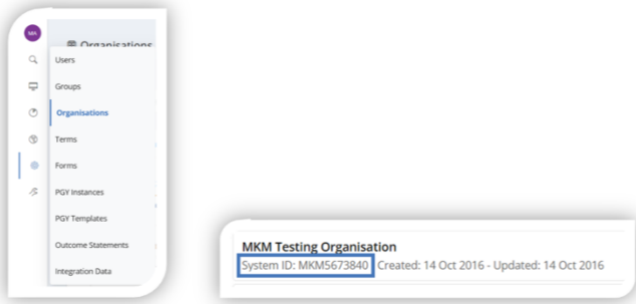A pop-up box will appear with the option to 'Download import template' – click on this.

This will download an excel spreadsheet to your device which you can use to enter user details in bulk.
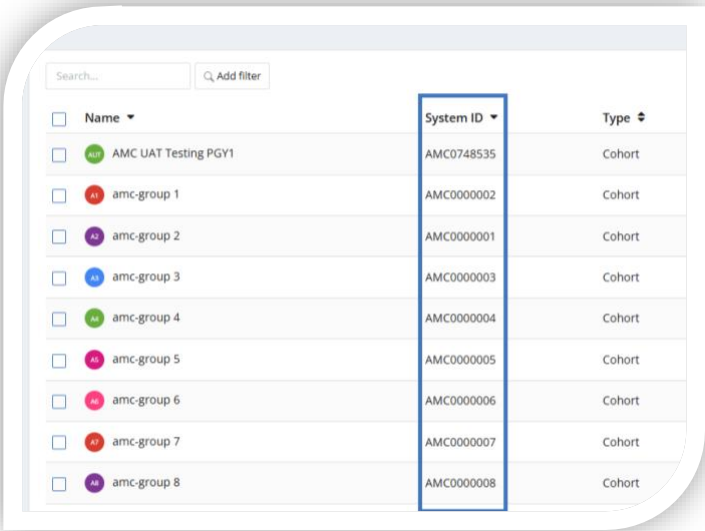
2   Completing the User Import Spreadsheet

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. • Where you are updating a user account that already exists, include the existing users email address in this field.	Optional
FirstName	• Enter the user's first name. • If a user doesn't have a legal first name, enter a dash '-' in the first name field. • If entering a prefix and/or middle names, include these in the FirstName field.	**Mandatory**
LastName	• Enter the user's last name.	**Mandatory**
Email	• Enter the user's email address. • This should be their professional email address. • Email addresses can be updated later and will not impact the continuity of the trainee's assessment profile.	**Mandatory**
OrgReference	• This reference links a user to a specific organisation in CLA. • The organisation a user is linked to should be relevant to their role and the organisation that they have permission to access information for. • You will need to enter the relevant CLA reference number for the organisation that you want to link the user to. **Note**. The OrgReference in the spreadsheet must match that in CLA for the upload to work correctly and the users to be linked to the correct organisation. • This reference can be found within the '*Organisations*' area of the administration panel. 　　o Navigate to the 'cog' icon on the administrator menu bar and click 'Organisations'. 　　o Find the organisation that you want to link the users to. 　　o 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	**Mandatory**

below).

MainRole	• This is the role that will be associated with a user. Different roles have different permissions to perform functions within CLA.
	• The following roles are available to assign users to:
	    o Medical Education Unit Administrator
	    o Director of Clinical Training
	    o Executive Director of Medical Services
	    o Medical Education Officer
	    o Trainee
	    o Term Supervisor
	    o Clinical Supervisor
	• See the Role Matrix at the end of this document for more information on what each role can do in CLA.
	• **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. • 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 CLA and can be left blank.	Not Required
Facility **Hospital and Health Service** **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. • 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.	Optional

	• The preferred format for phone numbers is 0x xxxx xxxx for landlines and 04xx xxx xxx for mobiles. • This field is not mandatory.		
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. • 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. • Any users who don't have a welcome email sent straight away can be sent it in the future when required. • If you wish to send welcome emails at the point of importing users, 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 to. • 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. • **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. • Admin users can create groups as required to manage trainees within their hospital or health service. • 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 GroupReference field of the spreadsheet. • Refer to the Clinical Learning Australia Administrator User Guide for more information on groups.	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 screen in CLA, select 'Import users' in CLA and click the 'Drop file to upload' icon to upload your file. Once you file has been successfully uploaded, the relevant user profiles will be set up in the system.
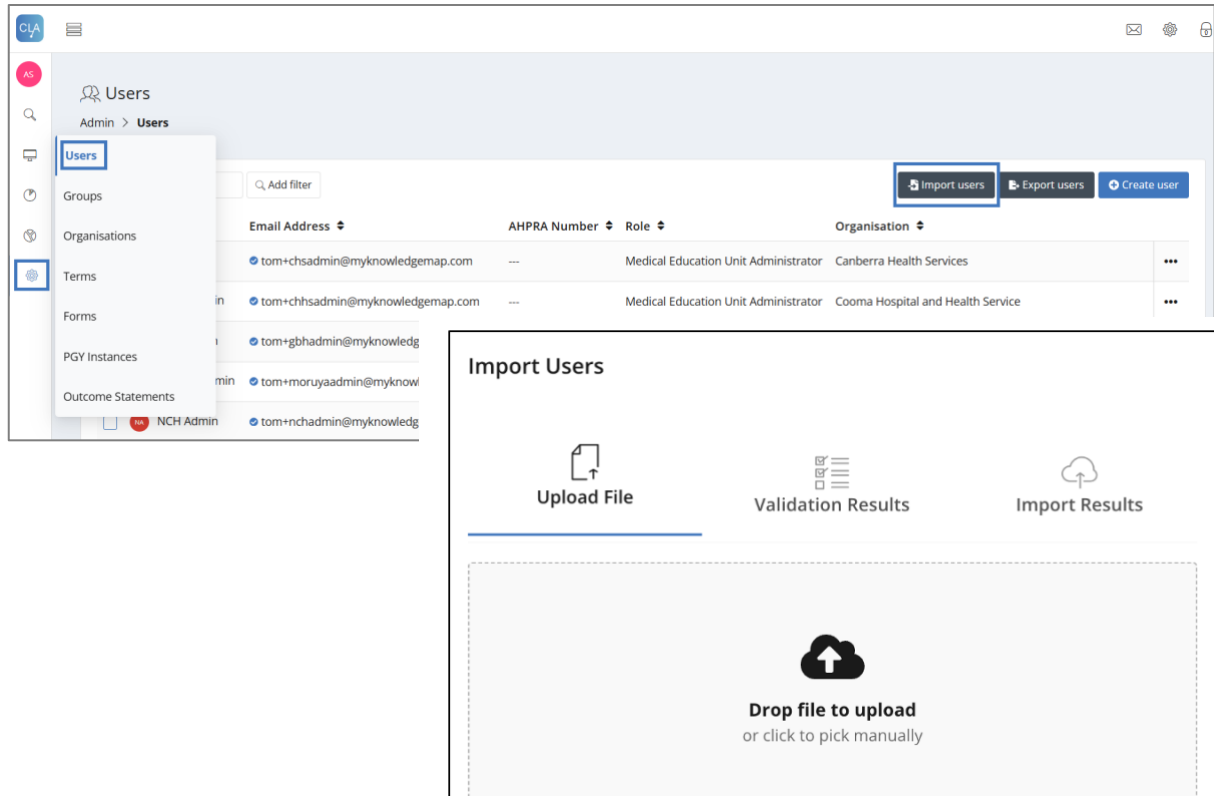
The data undergoes a validation process as part of the data upload process. If there are any errors with the data being uploaded, for instance incorrect OrgReference or Role, these will be flagged on the screen for review and correction. Review the user import spreadsheet, make necessary corrections and try to upload again.

Role Matrix

Area/Page/ Function	Trainee	EDMS/ DCT	MEO	Statewide Admin & MEU Admin	Term Supervisor & Clinical Supervisor
Complete Self-Assessment	✓				
Complete Logbook / Case Procedure	✓				
Complete EPA*	✓ (partial)	✓			✓
Complete mid/end of term assessment					✓
Find Trainee		✓	✓	✓	
View & Edit Responses	✓		✓	✓	
View Trainee Dashboard		✓	✓	✓	✓ (where linked)
Access Reports			✓	✓	
Detailed response report			✓	✓	
Completions report by category			✓	✓	
User diagnostic report				✓	
Recently created user				✓	
Training Administration				✓	
Create, edit & manage users				✓	
Import & export user details				✓	
Create, edit & manage groups				✓	
Import groups & export groups				✓	
Create, edit and manage organisations				✓	
Manage organisation custom properties				✓	
Manage organisation terminology				✓	
Create, edit and manage terms				✓	
Import and export terms				✓	
Create, edit and manage PGY instances				✓	
Create, edit and manage PGY templates				✓	

			✓	✓	
Create, edit and manage term allocations					

Note that all roles can only view information within the organisational entity to which they are assigned or in the case of term and clinical supervisors for the duration of the term in which they are supervising the trainee.

*EPAs can also be completed by another nominated assessor for whom the administrator approves the EPA assessment as being valid.