

CLEAR REVIEW

Importing Personal Development Objectives

Administrator guide for importing personal
development objectives

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1. Introduction

- You can import Personal Objectives into Clear Review and assign them to users by using a CSV data file.
- You may wish to use this facility if you wish to assign the same objective to multiple users.
- To import the objectives, click the **Personal Development Objectives - Import from CSV** button on the **Admin** page.
- Following import, you will be emailed a summary of the import results along with details of any errors encountered during import (e.g., missing mandatory fields).
- [Click here for a template CSV file](#) for uploading Personal Development Objectives

2. Format of the CSV File

- The CSV file must contain the columns listed below in the exact order shown, otherwise the file will be rejected:
 - objective_reference_number
 - user_reference_number
 - description
 - expected_outcome
 - proposed_learning_activity
 - area_of_development
 - target_start
 - target_completion
 - approval_status
- **All of the columns are mandatory**
- When the import process has finished, you will be emailed a summary of the import results.
- The first row of the CSV file must contain the 8 column headings as listed above. The column headings must be spelt exactly as shown and all lower case.
- Below the headings row, there should be one row per objective per user.
- A template CSV data file that you can use is attached to this page. It contains the correct column headings and one example data row. Please remove the example data row before using it.
- Note that if you open this template in Excel and edit it, Excel will most likely change the date format of the two date fields. So before saving and importing it, ensure you change the format of the date fields back to yyyy-mm-dd
- The CSV must be in UTF-8 encoding. If you edit the template in Excel, it can sometimes change the encoding which will cause the import to fail. Therefore, we recommend that before you import it, you open the file in Notepad and 'Save As', selecting UTF-8 as the encoding.

3. Ensuring Good Quality Import Data

Please read the notes below on each of the import data columns to help ensure that your data is correct and reduce the likelihood of import errors:

| Column (all are mandatory) | Notes |
|----------------------------|---|
| objective_reference_number | <ul style="list-style-type: none"> This is a unique reference number that you give each objective on each row. It is not seen by the user - it is stored by the system in the background, and it enables you to import the CSV file more than once (e.g., if you need to correct errors) without creating duplicate objectives Each row must have a different reference number. If you import a different set of objectives at a later date, be sure to use a different set of reference numbers here, otherwise the CSV will overwrite previous objectives you have imported. For the objective_reference_number, we recommend that you use the current date followed by a number that increases with each row - e.g., 20161001-1, 20161001-2, 20161001-3, etc. |
| user_reference_number | <ul style="list-style-type: none"> This is the reference number of the user to whom you want to assign the objective. |
| description | <ul style="list-style-type: none"> The objective Description. |
| expected_outcome | <ul style="list-style-type: none"> The expected outcome is what you hope to achieve when you accomplish the objective |
| proposed_learning_activity | <ul style="list-style-type: none"> The proposed learning activity is the action needed to complete the objective. This must match with the one of the options which is already set up in Admin - Personal Development Objective Options |
| target_start | <ul style="list-style-type: none"> The target Start Date of the objective. The format of the date must be yyyy-mm-dd. |
| target_completion | <ul style="list-style-type: none"> The target Completion Date of the objective. The format of the date must be yyyy-mm-dd. |
| approval_status | <ul style="list-style-type: none"> Enter 'Approved' in this column if you want the objectives to be imported as approved. |



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