

CLEAR REVIEW

Importing Performance Objectives

Administrator guide for importing performance objectives

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Table of Contents

Disclaimer	2
1. Introduction	3
2. Format of the CSV File.....	3
3. Ensuring Good Quality Import Data	4
4. Handling Errors	5

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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 **Performance 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).

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
 - success_measure
 - organisational_goal
 - target_start
 - target_completion
 - approval_status
- **All the columns are mandatory**
- 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.
- **Please click here to access a template CSV data file** that you can use as a starting point to preparing your file. It contains the correct column headings and one example data row. Please remove the example data row before using it.
- Note import 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.
success_measure	<ul style="list-style-type: none"> The objective Deliverable. Only one Deliverable per objective may be imported via the template. Additional Deliverables may be added within the system.
organisational_goal	<ul style="list-style-type: none"> The Organisational Goal that the objective should be linked to (this can be any value and does not necessarily have to match one of your existing Organisational Goals).
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 Enter 'Proposed' in this column if you want the objective to be imported as not yet approved

4. Handling Errors

- When the import process has finished, you will be emailed a summary of the import results.
- Where the system encounters errors when importing the CSV (e.g. a mandatory field is missing, a user's reference number cannot be found, or a date is in the wrong format) the results email will include a link to a table showing all errors from the import. The table will specify the row in the CSV where the error was located and provide the reference number of the affected user. You can then correct the error(s) in the CSV file and re-import it (ensuring that you don't change any of the values in the `objective_reference_number` column).
- Note that where the system encounters an error in a particular row, only that row will not be imported. The import process will continue to import subsequent rows in the CSV.
- If the CSV file fails to import and you receive an error saying the headers are not correct:
 - First check that your column headers exactly match those in the table above and that there are no additional columns.
 - If the import still fails, it is likely that the encoding of the CSV file is incorrect (this normally happens where the file has been edited in Excel). The file needs to be encoded in UTF-8 format. To resolve this issue, open the file in Notepad and 'Save As' select UTF-8 as the encoding.



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