

CLEAR REVIEW

Importing Employee Data

Administrator guide on importing via CSV

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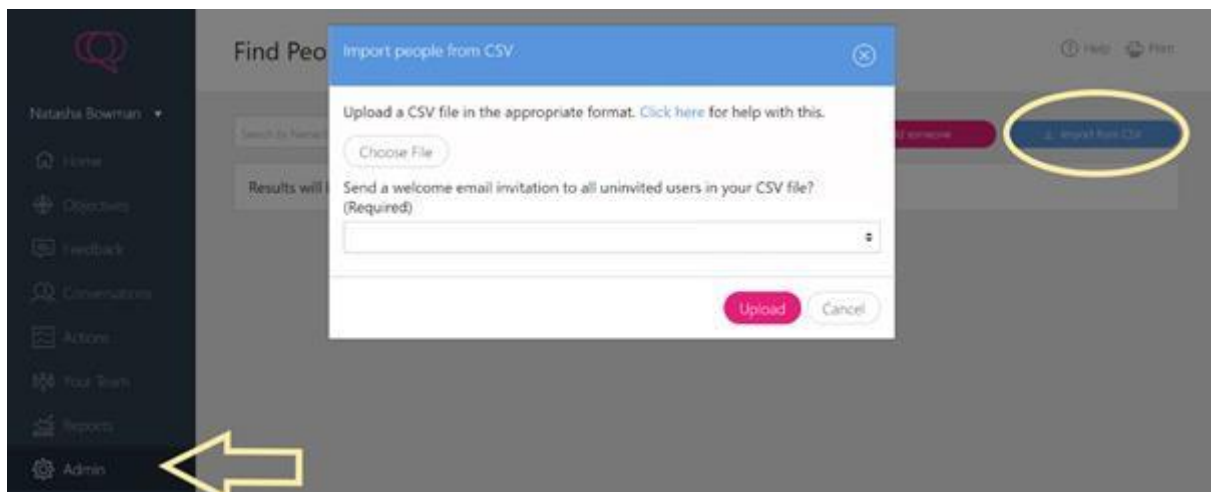
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1. Introduction

As an administrator, you may want to import some or all of your user details in bulk directly to Clear Review. This can be done by using a CSV data file and will enable you to add new users, make updates to existing users, and make users inactive if they leave.

To import user data, simply click the **Import from CSV** button on the **Admin > Find & Manage People** page. Following an import, you will be emailed a summary of the results along with details of any errors encountered during import (e.g., missing mandatory fields).



- This process can also be automated should you wish to set up an FTP import process. [Read this document](#) to learn more.

2. Getting Started

Many of our clients will extract their user data from a HR or Payroll information system. The data fields required for this process are shared in more detail below.

One key factor to consider as you are compiling your data, is that you will need to have a unique reference number associated with each user. This will help the system determine whether the user is new or existing. If you are using a HR or Payroll platform, we strongly recommend matching your system's Staff Number or Employee Identifier to the Clear Review reference_number field.

- **A New User:** is added when a row in the CSV contains an employee reference number that **does not** already exist in Clear Review.
- **A User Update:** occurs when a row in the CSV matches an employee reference number that already exists in Clear Review. In this case, the data from the CSV file will update the existing data in Clear Review for those users.

3. Format of the CSV File

Please click here to access a template CSV data file for importing employees. It contains the correct column headings and one example data row (which should be removed prior to using). It includes two organisation unit columns, though you may add as many additional organisation unit columns as needed to the right of these or remove if not needed.

The first row of the CSV file must contain the column headings as included on template. The column headings must be spelled exactly as shown and all lower case unless otherwise noted. There are a few optional data fields as highlighted in yellow and their data requirements are summarised below:

	A	B	C	D	E	F	G	H	I	J	K
1	reference_number	email	first_name	last_name	gender	approver	approver2	leaving_date	job_title	org_unit_1	org_unit_2

Optional data fields:

- gender (optional - column heading must be present, but user values may be blank)
- approver2 (optional - additional approver columns may be added if assigning multiple managers)
- job_title (optional – heading and user values may be blank)
- org_unit_1, org_unit_2 (optional – additional may be added, heading text may vary)

Additional tips:

- Below the headings row, there should be one row per user record.
- You will be prompted during the upload process to confirm if you would like to send or suppress invitations to new users (this does not apply to SSO clients).
- For organisations who have an HR information system, we recommend that you setup a report in your HR system to extract the necessary details in the same format as in the attached template CSV file. You can then simply run the report periodically and import it into Clear Review. If you are unable to extract details of leavers in the same report as your current employees, you should set up a separate report for your leavers that includes their date of leaving.

- The CSV file should be in UTF8 format (see below for instructions on how to do this).

4. Ensuring Good Quality Data Import

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. ****Important note****: all columns indicated as mandatory will not be imported if left blank:

Column	Mandatory	Notes
reference_number	Yes	This is the employee's reference number and is used by the system to determine whether the data row refers to a new or existing user.
email	Yes	<ul style="list-style-type: none"> • This is the user's email address. • The email must be unique - if the email address already exists for another user in the system, the entire row will not be imported.
first_name	Yes	<ul style="list-style-type: none"> • The user's first name • The following items are not allowed <ul style="list-style-type: none"> -- HTML tags -- Dots i.e. '.' -- Email addresses and URLs -- Any of these characters: `~!£\$^+=€ <>
last_name	Yes	<ul style="list-style-type: none"> •The user's last name •The following items are not allowed <ul style="list-style-type: none"> -- HTML tags

		<p>-- Dots i.e. '.'</p> <p>-- Email addresses and URLs</p> <p>-- Any of these characters: `~!£\$^+=€ <></p>
gender	Heading only	<ul style="list-style-type: none"> • The user's gender. • Acceptable values for Male are: 'M' or 'Male' in upper or lower case • Acceptable values for Female are: 'F' or 'Female' in upper or lower case • A record with any other value will be assigned a gender of 'Not Specified' in the system • This column and heading must be in the CSV file, but cell contents can be left blank. If blank, a gender of 'Not Specified' will be assigned
approver	Yes	<ul style="list-style-type: none"> • This is the reference number of the user's approver (i.e., manager) which is used to assign the user's approver in the system. You cannot use the approver's name or email address. • If the reference number provided cannot be found in the system, the Approver field will not be updated for that user, but all other data in that row will be updated • This column and heading must be in the CSV file. However, individual cells in this column can be left blank (for example if a user does not have a current approver).
approver2	No Optional	<ul style="list-style-type: none"> • This column is optional and is only needed if you wish to assign an additional manager to one or more users in your import. • This column should contain the reference number of the user's second approver (i.e. manager) • If you wish to assign more than two managers to users, you can add additional columns called "approver3", "approver4", etc, immediately to the right of this column.
leaving_date	Heading only	<ul style="list-style-type: none"> • This field notifies Clear Review of employees who have left so they can be made inactive. • The format of the date must be yyyy-mm-dd

		<ul style="list-style-type: none"> • If this date is in the past the user will be made inactive in Clear Review. • If this date is today or in the future, the user will remain active in Clear Review. • If the field is left blank, the user will remain active in Clear Review. • This column and heading must be in the CSV file, but the values may be left blank.
job_title	No Optional	<ul style="list-style-type: none"> • This column is optional and is only needed if you need to assign job titles (e.g. Head of Content, Marketing Assistant, etc.) to employees within Clear Review.
Organisation Units	No Optional	<ul style="list-style-type: none"> • You can have as many organisation unit columns as you wish and you can call the columns whatever you want. Any column with an organisation unit value must have a column header. • The system will accept any data values in the organisation unit columns. • You may assign employees to organisation units in Clear Review (e.g. Function, Department, Country etc.) by adding these columns to the right of the 'leaving_date' column. • You can assign employees to as many organisation units as you wish using one column per organisation unit type. • You can choose what to call each organisation unit column (e.g. "Organisation Unit 1" or "Department")

5. CSV Data Troubleshooting

Once you have uploaded your file, you will receive an email containing a link to the import summary results. If there are any errors listed, the report will show you the row in which the error occurred, followed by the reference number of the impacted user and the reason for the error. This document will help guide through the troubleshooting process as you will need to resolve any errors to ensure all required data has been successfully loaded.

Import Errors Help Print
 Data imported by Clear Review Administrator, 2020-05-27

Import Summary

- Rows in your CSV: 192
- New users added: 191
- Users updated or unchanged: 0
- Rows with errors: 2
- Invalid rows: 0

Row	Ref Number	Error Details
192	7248	Approver does not exist
193	5245	Invalid email

Here are the most common errors we see and how to resolve them:

- **“a mandatory field is missing”** – review your headers on the upload file and ensure it matches those described above
- **“email address already exists for another user”** – find the row the report mentions and check if the person’s email address is being used elsewhere. If it is not, there’s a high probability that the reference ID is already in use!
- **“approver does not exist”** – indicates that the desired manager does not exist within the system – to resolve, simply create a user row within your data file containing your manager data. Alternatively, recheck the approver number is accurate for the manager.
- **“invalid email”** – the email address of the specified user has been input incorrectly

Additional tips:

- The import summary results error table will specify the row in the CSV where the error was located and provide the reference number of the affected user. You can either correct the error(s) in the CSV file and re-import it, or manually correct the error(s) using the **Admin > Find & Manage People** screen.
- If 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.
- When you import the CSV file, if you see an error message saying it has "incorrect headers" or "could not understand the contents", check that the column headers are in the correct order and spelled **exactly** as specified.
- Check also that your CSV has been saved in UTF8 format (see below for further details).

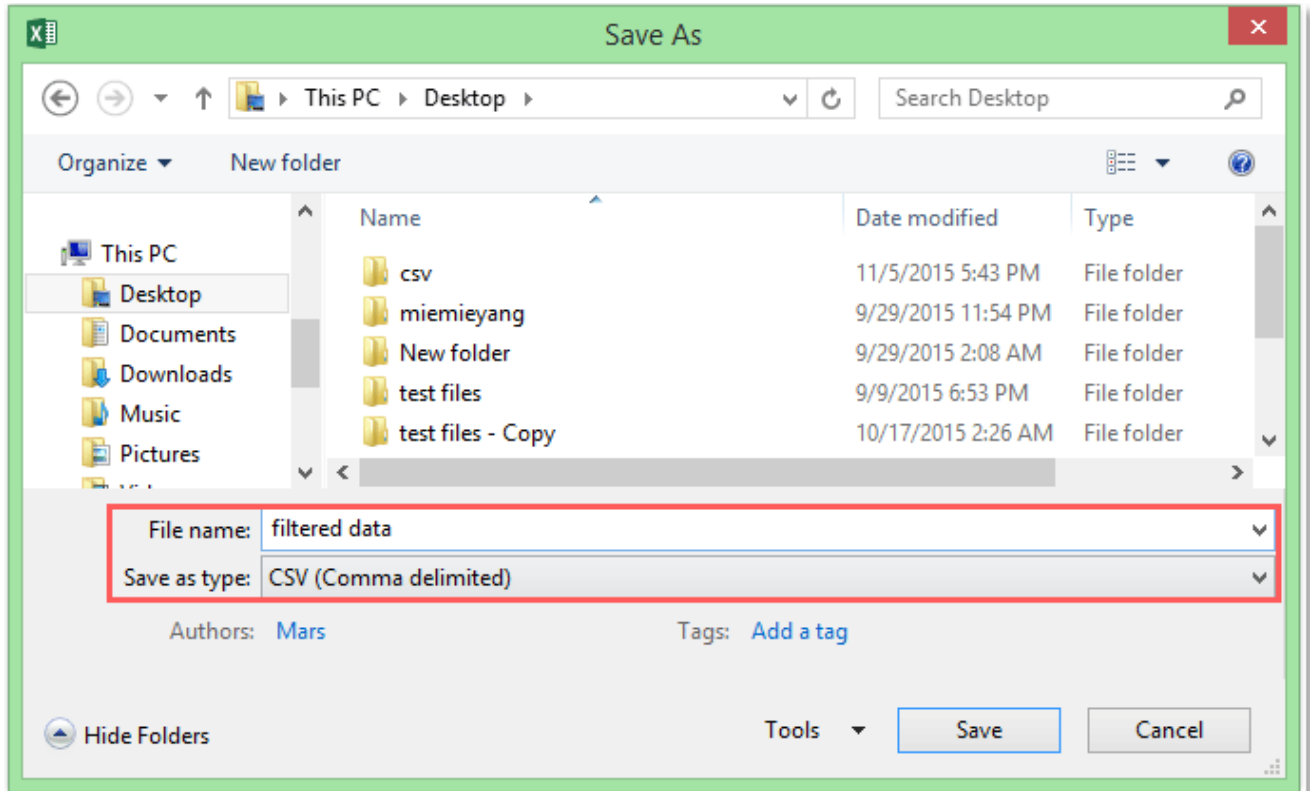
6. Formatting your CSV in UTF8

Clear Review requires the import data file to be encoded in UTF-8. If you have created the import file or manipulated it in Excel, Excel may have saved it as a ANSI CSV format file. If you try to import such a file, Clear Review will give you an error saying it is not a valid CSV file.

If you are on the latest version of Excel, you can overcome this by using "Save As" and selecting "CSV UTF-8".

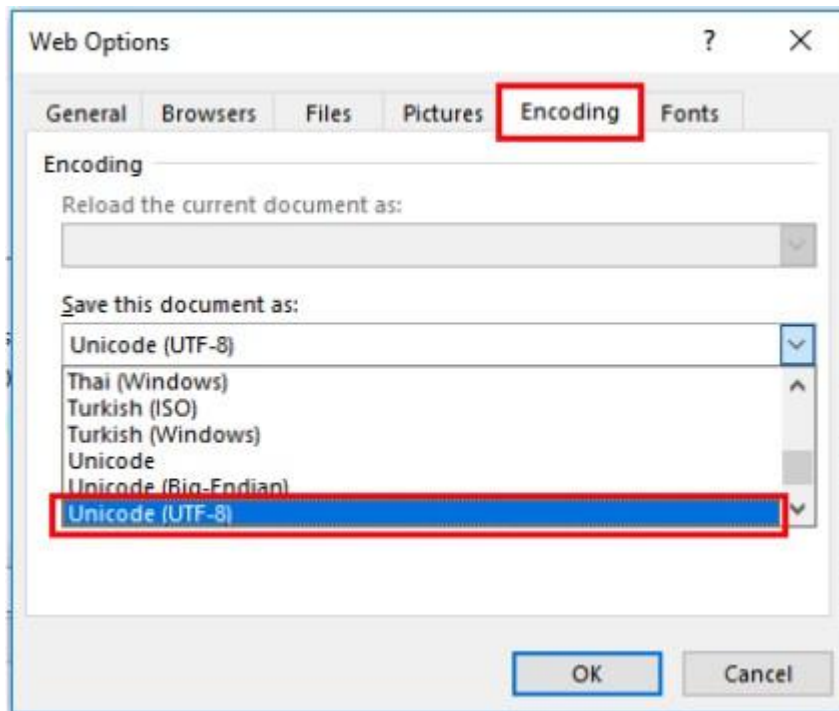
If your version of Excel does **not** have this option, please follow the instructions below:

1. Click **File > Save As**, and select a folder to place the file:
2. In the **Save As** dialog, type a name for the file in the File names box, choose CSV as the type, and click **Tools > Web Options**:





3. In the Web Options dialog, under the Encoding tab, choose Unicode (UTF-8) from the "Save this document as" list:



4. Click OK > Save. The CSV has been saved as a UTF-8 encoded file



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