# How to upload a list of WORKERS

**You may have a list of Workers (or Volunteers) you want to register into this system. This page tells you how to upload them. Your list needs to be formatted into a file the system can process and any incomplete details will have to be corrected after the upload. This document takes you through the steps.**

## Before you start

⮩ Agencies using this system have different words for the people who are booked by clients. (For example; "colleagues", "caregivers", "customers".) In this process we use the term "Worker".

☑ In this process you will be handling sensitive data relating to individual users. Be sure you have permission to do this and that copies of the data are securely stored or wiped after the upload.

⮩ If you have access to a demonstration agency you might want to try uploading some fictitious data there as a trial run. (A demonstration agency is one with "demo-uflexi.com" in the URL of each screen. Systems for real data just have "uflexi.com".)

To do this:

- Prepare some demonstration data for upload. You may want to use the blue text in our template for upload (see below). Just make sure:
  - You enter a valid name for an Advisor in the demonstration agency is added in each row. (Column Q)
  - The email addresses in Column D are changed. Like the main system, the demonstration system needs a unique email address for each Worker. We use "unusedemail" as the body of the email addresses in the template. The easiest way to turn them into addresses unique to you is to run a find/replace and change "unusedemail" to whatever word or characters you like.
  - The contract title or number (Column R) mirrors the title or number of a contract in the demonstration agency. (Find this by clicking Settings in the top menu bar then "Legal" in the side navigation. Look for the bottom tab in that section.)
- Navigate to the Upload page in your demonstration agency (you must be logged in as a superuser to access this page). Follow the instructions in sections four and five below.

## 1) Collect the essential data

a) There are some basic details the system needs to create a record for each Worker. In each case, you will need to know, as a minimum:

- The person's name

- Their address

- An email address

- Their date of birth

&#10149; Any of these details can be changed later.

## 2) Download the template for your file

a) Download our template. To make uploading easy, we have created a template file. Simply paste your data into that file to be sure it is ready for upload. The template can be downloaded here. (http://beyondjobs.com/data-upload-help-workers/)

&#10149; We suggest you make a second copy of the file, that allows you to go back to the first one if there are any mistakes.

Assuming you have the Excel version, not the CSV template, the file now on your desktop looks like this:

| user.status | user.firstName | user.lastName | user.emailAddress | user.password | telephone | emergencyContact | socialSecurityNumber |
|---|---|---|---|---|---|---|---|
| | ESSENTIAL COLUMN | ESSENTIAL COLUMN | ESSENTIAL COLUMN | | | | |
| Status | First name | Second name | Email address | Password | Telephone (not cellphone) | Emergency contact | SSN: Social Security Number |
| NOT YET APPROVED | John | Smith | A@unusedemail.com | | 998665412 | Mother 21366788456 | 123-33-4444 |
| APPROVED | Martin | Jobnes | B@unusedemail.com | Tommy123 | | | |
| | Paul | Patel | C@unusedemail.com | | | Brother Adam works for us | |
| APPROVED | Simon | Martins | D@unusedemail.com | | | | 444-79-1851 |
| APPROVED | Sara | Torrance | E@unusedemail.com | | | | |
| | Sally | Reading | F@unusedemail.com | | | Mila Downes 8765543900 | |
| NOT YET APPROVED | Henry | Sansbury | G@unusedemail.com | | 41458577321 | | |
| APPROVED | Teri | Elk | H@unusedemail.com | | | | |
| | Erin | Farthing | I@unusedemail.com | Sally678 | | | |
| NOT YET APPROVED | Mary | Presents | J@unusedemail.com | | | | |

Understanding this file:

- Ignore the top, yellow, row. These are just the database headings the system will need when you upload.

- The second row is color coded to show essential columns. If a column is green in this row, the system must have an entry in that column to create a record. If a column is red you are free to leave it blank, the system will use a default setting or leave the field empty when it creates the record.

- The gray third row shows the data to go in each column. It uses the labels you see on system screens for creating a new Worker.

- We have entered some demonstration data to give you a feel of how each column can be formatted. This text is in blue. It will be deleted before you upload your file.

(Don't worry: your data will likely be much simpler than the details we have used. We wanted to show the range of formatting possibilities that are acceptable in each column.)

- ⤵ You may want to leave our demonstration data in place while you enter your data in the rows below. The blue data will show you what sort of formatting you can use in the rows you create.

☑ You should now have a template on your desktop and be ready to enter your data.

## 3) Populating each column in the template

a) **Paste your data**. Copy each column of data in your current file and paste it into the appropriate column on the template.

- ☑ It's a good idea to check your columns did not slip out of line with each other during the copy and paste. So, maybe compare the last row of data in the template with the same row in the file that you copied it over from. Are they the same in every column? If so, your data transfer has likely been accurate.

b) **Confirm the essentials**. Check that all the essential columns (the ones colored green in row two) are populated. If you do not have the data required to hand you may want to enter temporary details, for instance using your office address for the home address of any Worker with no location details. (But the temporary details will need to be overwritten at some point, so it is worth finding as much information as possible before uploading.)

⤵ Non-essential columns can be partially populated. Look at your template in the Emergency contact section (Column G) for example. Some Workers have already been given an abbreviation; the system will generate a shortened version of the name for the others.

c) **Check the formatting of each column is correct**. The ones to particularly watch are:

- **Column N**: Dates of birth have to be formatted precisely. They must be uploaded in the format MM/DD/YYYY. So April 17th, 1992 must be written as "04/17/1992". The database can't accept "4/17/1992" or "04/17/92".

  - ⤵ If you are using Excel you may find it easiest to keep this column formatted for text (not date).

- **Column Q**: The name of each Worker's advisor must exactly match the way the advisor's name has been entered into the system. (So, if an advisor's name is "Jane Doe", the system will reject "Jan Doe", "Jane doe", "Jane  Doe" and other variants.)

⤵ Here's further details to help you check formatting in each column before upload.

| Column | Heading | Notes | Essential column? | What happens if this column is left blank? |
|---|---|---|---|---|
| A | Worker status | Each Worker you upload can be Not Yet Approved or Approved status. If they are Approved they can make bookings immediately. | No | The system will set the user at Approved status |
| B | Worker first name | This is the name of the new Worker | Yes | |
| C | Worker first name | This is the name of the new Worker | Yes | |
| D | Worker's email address | This must be unique. The system will reject any email address that is already in use by another user | Yes | |
| E | Worker's password | You can tell the system what the user's password is to be be. We don't recommend this with live data involving real users, but it can be useful for training or demonstration data. | No | The system will create a password randomly, it will then need to be changed by a member of agency staff or by the user accessing their "change password" link. (This only works if the user can access the email address at which they registered.) |
| F | Worker's home telephone number | This is not their cellphone number that is used by the system to send/receive SMS messages. | No | The field will be left blank for that Worker. |
| G | Emergency contact | The system can store details of who should be contacted if there is a problem involving this Worker. | No | The field will be left blank for that Worker. |
| H | SSN: Social security number | This is a 9 digit number unique to the Worker. It is typically written with two hyphens e.g.: 213-45-6785 | No | The field will be left blank for that Worker. |
| I | Home address (Line 1) | This is the primary address for the Worker | Yes | |

| | | | | |
|---|---|---|---|---|
| J | Home address (Line 2) | | No | The field will be left blank for that Worker. |
| K | Home address (City) | | No | The field will be left blank for that Worker. |
| L | Home address (State) | | Yes | |
| M | Home address (Zipcode) | | Yes | |
| N | Date of birth | This is used for enforcing any rules around maximum hours for Workers under 18 as an example. The date must be input as mm/dd/yyyy | Yes | |
| O | Cell number | This can be used by the system to send SMS messages to the Worker. | No | The field will be left blank for that Worker. |
| P | Our reference | This is your agency's reference for this Worker. | No | The system will automatically generate its own unique reference for the Worker |
| Q | Our advisor | Each Worker must be assigned to one member of your agency's staff. The name must be written in your file exactly as it appears in the system. To see your list of staff, click Settings > Users. | Yes | |
| R | Contract version | Your agency can have multiple contracts. Each Worker must have agreed to one before they are approved.<br><br>Again, you need to use the exact name of the contract used by the system. To see your list of contracts: Click Settings > Legal: [Worker] contract. | No | If the Worker's status is "Approved", The most recently added contract for Workers will be added.<br>If the status is "Not Yet Approved", no contract will be attached to the Worker. |
| S | Our internal notes | These are notes displayed in the Manage Worker screen. They are only visible to you and your agency staff. | No | The field will be left blank for that Worker. |
| T | Looking for long term positions | Is this Worker seeking full time work? If so enter a Yes, if not a No. | No | The field will be set at NO for this worker. |

| | | | | |
|---|---|---|---|---|
| U | Bank name | These are details of how you can pay the Worker. | No | These fields will be left blank for that Worker. |
| V | Bank account name | | No | |
| W | Bank sort code | | No | |
| X | Bank account number | | No | |
| Y | Reference name | Use these columns if you want to enter details of a first reference for a Worker (for example, a college tutor who will vouch for their qualities). | No | These fields will be left blank for that Worker. |
| Z | Relationship of reference | | No | |
| AA | Reference's email address | | No | |
| AB | Reference's telephone | | No | |
| AC | Period covered by reference | | No | |
| AD | Reference address (Line 1) | | No | |
| AE | Reference address (Line 2) | | No | |
| AF | Reference address (City) | | No | |
| AG | Reference address (State) | | No | |
| AH | Reference address (Zipcode) | | No | |
| AI | Work outside this system: (No. of bookings) | Use these columns if you want to display details of the Worker's past record at work before they joined this system. Anything entered here will be output in the Worker's profile. | No | These fields will be left blank for that Worker. |
| AJ | Work outside this system: (No. of clients) | | No | |
| AK | Work outside this system: (No. of hours worked) | | No | |
| AL | Agency comment (displayed in this person's profile) | This is text about the Worker from the agency. (For example: "Abdul is a keen footballer, keen to develop a track record of work in landscaping before starting a horticultor course".) | No | This field will be left blank for that Worker. |
| AM | Maximum hours the person can be | This figure cannot be above legal maximums. | No | The default setting of maximum legal |

| | | | | |
|---|---|---|---|---|
| | booked this week | | | hours will be applied. |
| AN | Maximum travel distance for bookings (miles) | These are the rules set on a Worker's "My Terms" screen. (Your agency may have this functionality switched off, in which case ignore this section.) | How far will the person travel from their base address to a booking? | No | If the full "My Temrs" functionality is turned on, the system's default settings will be applied. |
| AO | Minimum length of session (hours) | | What is the shortest number of hours in each session of a booking this person will accept? | No | |
| AP | Minimum hours of notice for a booking | | How much notice does the person require for a booking. Entries must be in precise number of hours, one of: 0, 1, 2, 4, 6, 8, 12, 24 (one day), 48 (two days), 72 (three days), 168 (one week) | No | |

☑ You should now have all the data you need in the template.

## 4) Preparing and uploading the file

a) **Remove the surplus rows**. To get ready for upload, delete rows 2 through 13 of your template. And remove any empty rows above the data you have entered. The template should now just consist of the yellow row right at the top in row one, plus all your entries in row two and below.

b) **Split a long file**. The system will take in up to 50 Workers in each upload. If you have more, you need to make copies of the upload file and cut each down until it only has 50 rows. So, if you have 167 Workers to upload, you will end up with four files, three having 50 rows and one having the last 17.

⮥ Remember to keep the yellow row at the top of each of the copied files. The system needs this to allocate data to the right database fields.

c) **Ensure the file is saved as a CSV**. You may have been working on an Excel spreadsheet, or other file format, for convenience. In that case, save your file as a CSV (Comma Separated Values or ".csv") file. Do this using the "Save As" function on your desktop.

⮥ An Excel spreadsheet can be Saved as many types of file. ".csv" is halfway down the lower list.
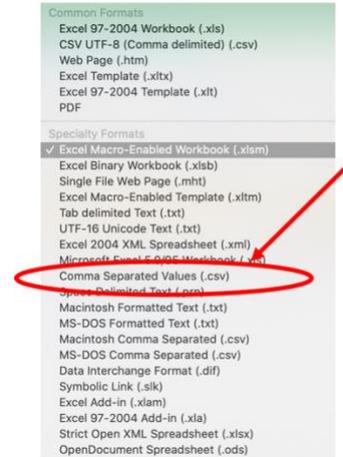
d) **Upload the CSV file**. On the Upload page, at the bottom, click the Browse button. Find your CSV file on your desktop and click it. The name of your file will appear on the screen:

**Upload File**

Workers    Browse...   201126 ALL COLUMNS.csv

UPLOAD

e) Click UPLOAD.

☑ You have now entered your data into the system.

☒ If the system rejects your file it is likely because of some combination of:

- It is not a CSV file

- The top (yellow) row of database headings is missing

- The file has more than 50 rows.

- There are gaps in the essential data.

Correct the issue and try again.

## 5) Confirming the data

⮥ You can cancel your upload at anytime by clicking the "Cancel" link at the bottom of the screen. Your data will not be retained in the database.

a) **Look for incorrect data**: You will see a screen displaying your uploaded data. It may have a red banner across the top "*Please make the following correction(s) before proceeding*." This is alerting you to cells in the data that it can't validate.

☒ Reasons for rejecting a particular cell include:

- **Incomplete data**: for example a phone number missing a digit or an email without the "@" sign.

- **Duplication**: The system already has a user with the email address or phone number entered.

- **Non-compliant**: Each address is checked against the master US addresses list. If the location you are uploading is not on that list it will be rejected as not existing.

- **Failed match**: For example, an advisor's name or a contract title does not exist.

b) **Correct any cells highlighted in red**.

➲ Here are some examples of rejected cells:



- The system already has a user with cellphone number (A). The Social Security Number at (B) has one too many digits. These kinds of entries that fail validation by the system can be corrected in the red cell.

If a cell can't even be validated, a failure notice will appear at the bottom of the screen.

| Failed | |
|---|---|
| Line | Reason |
| 9 | Parse exception ''21/02/1967' could not be parsed as a Date' on column 9 |

There is no 21st month!

☒ If you get a failure line. Cancel the upload, correct your master file then repeat steps 4c and 4d above.

⮑ If there are multiple red cells that need correcting you may find it easier to sort things out on your master file then repeat section 4 above.

⮑ Remember: any details can be changed later. So, if an incomplete address, email, or phone number is given, you can just enter a fictitious one for now and make a note to confirm correct details later.

c) **Click CONFIRM at the bottom of the screen**.

**18** Workers found

CONFIRM      Cancel
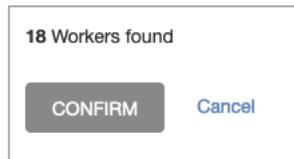
☑ You have now entered your Workers into the system. Search for any one of them to see their details on your Workers page.

☒ If the system rejects the final upload it is likely because an essential column was missing. Insert the essential column into your template and try again.