Support for *GoodFlexi* users

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 5 steps involved.

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 document 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:
  - The email addresses in Column D are changed. Like the main system, the demonstration system needs a unique email address for each worker. If other people will have used your dataset, the easiest way to make email addresses unique is to run a find/replace and change “unusedemail.com” (or whatever domain is in the current dataset) to whatever word or characters you like.
  - Cellphone numbers in column O are unique. This might require you changing a random digit in each one in the dataset to avoid duplication from other uploads to other agencies by other users.
  - You enter a valid name for an Advisor in the demonstration agency is added in each row. (Column Q)
  - The contract title or number (Column R) mirrors the title or number of a contract in the demonstration agency. (Find this once logged in as a superuser by clicking Settings in the top menu bar then “Agreements” 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.

CONTENTS

1) Collect the essential data

a) There are some basic details GoodFlexi 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

➲ Any of these details can be changed later for each worker. But it is worth finding as much data as possible to put in your upload file. It is much faster to do it in bulk than to enter fields for each worker once you have created their record in the system.

2) Download a 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/)

➲ 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			
APPROVED	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				
APPROVED	Sally	Reading	F@unusedemail.com			Mila Downes 8765543900	000-00-7329
NOT YET APPROVED	Henry	Sansbury	G@unusedemail.com		41458577321		
APPROVED	Teri	Elk	H@unusedemail.com				
APPROVED	Erin	Farthing	I@unusedemail.com	Football456			
NOT YET APPROVED	Mary	Presents	J@unusedemail.com				

<u>Understanding this file:</u>

- Ignore the top row. These are just the database headings GoodFlexi 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. Delete these rows if you are going to upload real data. (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 should use in the rows you create.

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

3) Populate columns 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.

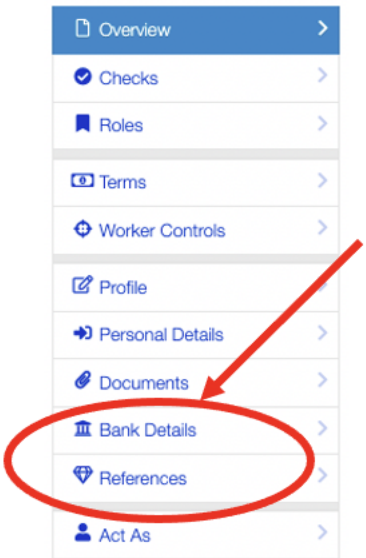
- ☑ It's a good idea to check your columns did not slip out of line with each other during the copy and paste. So, maybe compare the last row of data in the template with the same row in the file that you copied it over from. Are they the same in every column? If so, your data transfer has likely been 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 you may want to enter temporary details, for instance using your office address for the home address of any worker with no home address details. Or enter any date more than 18 years ago for a date of birth. (But the temporary details may need to be overwritten at some point, so it is worth finding as much information as possible before uploading.)

- **Check you are not uploading data that your agency doesn't use**. GoodFlexi will store data on each worker's bank details and lists of references. These pages are turned off for some agencies that don't want these functions.

  You can check if your agency uses these pages by clicking on the name of any worker to open their Overview page.

  Look at the side navigation panel. If Bank Details or References are not shown, your agency doesn't have this functionality enabled. Any details you enter for bank details or references in your uploads will be wasted.



- **Check the formatting of each column is correct**. The ones to particularly watch are:
  - **Column D**: Email addresses must be free of additional formatting: just "jane.doe@example.com" format, not "Jane Doe <jane.doe@example.com>".
  - **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 Microsoft Excel as your spreadsheet you may find it easiest to keep this column formatted as text (not date).
  - **Column Q**: If entered, 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", "J. 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 or has incorrect content?
A	Worker status	Each Worker you upload can be "Not Yet Approved" or "Approved" status. If they are Approved they are ready to be booked immediately.	Yes	Upload rejected
B	Worker first name	This is the forename of the new Worker	Yes	
C	Worker second name	This is the surname 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. **NOTE**: Check there are no blank spaces after an email address.	Yes	
E	Worker's password	You can tell the system what the user's password is to 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. If it is entered, it must be formatted with two hyphens e.g.: 213-45-6785. Note: GoodFlexi does not validate SSN's for uniqueness. (This is because some users only wish to store the last four digits of each SSN, entering "000-00-1234".)	No	The field will be left blank for that Worker.
I	Home address (Line 1)	This is the primary address for the Worker	Yes	Upload rejected
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	Upload rejected
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 stored in this format: mm/dd/yyyy (e.g.: 04/20/1997). (Check the spreadsheet in which you build the data is not changing this.)	Yes	
O	Cell number	This can be used by the system to send SMS messages to the worker. The number cannot be the same as another worker in the system. The system will only use the cell number as a point of contact for details of bookings if the "Send text messages" box is ticked for that worker. The box is under their availability grid on the worker's home page.	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 can 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.	No	The first name on your list of staff will be attached as the advisor. (This can be changed later on the Overview page for each worker.)
R	Contract version	Your agency can have multiple contracts. Each worker must have agreed to one before they are approved. 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. 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 staff at your agency.	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 team player, keen to develop his skills in landscaping and groundskeeping*".)		No	This field will be left blank for that Worker.
AM	Maximum hours the person can be booked this week	This figure cannot be above legal maximums.		No	The default setting of maximum legal 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	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

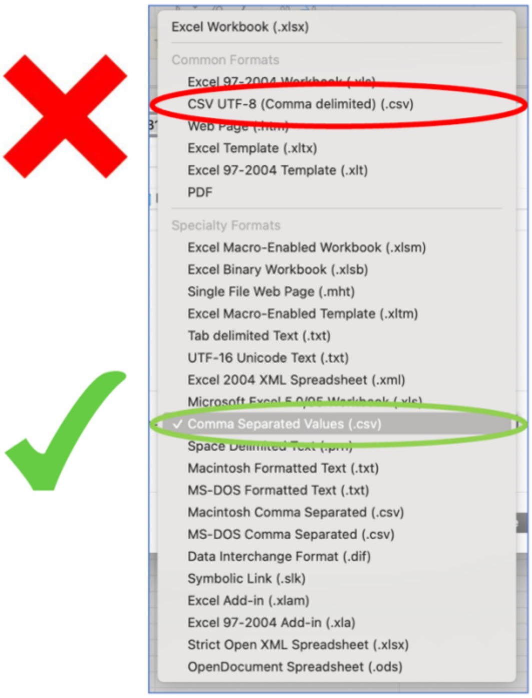
1) **Remove the surplus rows**. To get ready for upload, delete rows 2 and 3 of your template. And remove any demonstration data if it is not to be uploaded, then take out any empty rows above the data you have entered. The template should now just consist of the row of GoodFlexi column headings at the top in row one, plus all your entries in row two and below.

2) **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.

3) **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. There can be more than one version of CSV files on offer. Select the plain "Comma Separated Values", in Excel it is halfway down the lower list of file formats.



4) **Upload the CSV file**. On the Upload page, at the bottom, drag your file onto the button, or click the button then find your CSV file on your desktop and click it. The name of your file will appear on the screen:

5) **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 the right kind of CSV file (see above)
- The top row of database headings is missing
- Dates of birth can easily be incorrectly formatted. Each date must be input as mm/dd/yyyy e.g.: 04/20/1997. (If you access your CSV file through programs like Excel or Numbers it may change this formatting before you upload it.)
- Your CSV file includes columns that Excel or CSV have populated with some sort of additional content. If that happens you will see a message like this:

If you see this message, there's a simple fix. Open a new spreadsheet on your desktop. Save it with a new name. Do not move your cursor around the sheet. Copy only the rows and columns with content from the earlier sheet and paste into the new one. Save it.

With any of the above issues, correct the problem and repeat the upload process from step 3 above.

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.

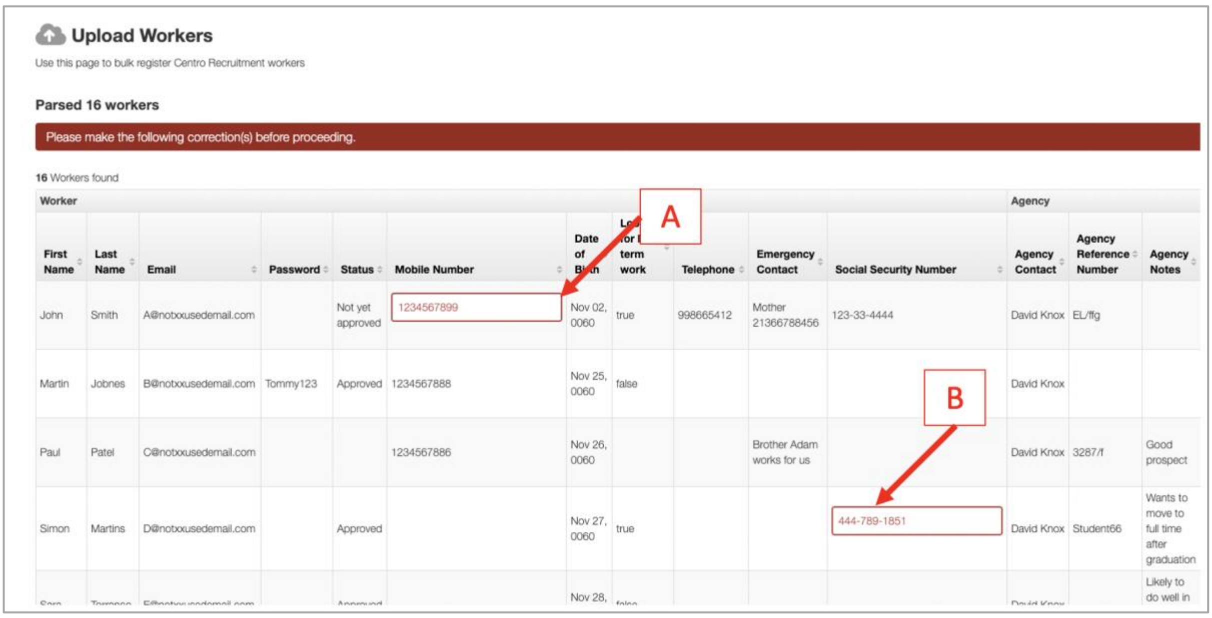
a) **Look for incorrect data**: You will see a screen displaying your uploaded data. It may have a red banner across the top "*Please make the following correction(s) before proceeding*." This is alerting you to cells in the data that it can't validate.

☒ Reasons for rejecting a particular cell include:

- **Incomplete data**: for example, a phone number missing a digit or an email without the "@" sign.
  - **NOTE**: Check there are no blank spaces before or after an email address.
- **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.
  - **TIP**: look up the address in Google Maps and check the formatting matches yours, if that doesn't solve it, perhaps use an address very close nearby.
- **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

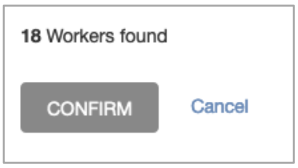
- Spotted the problem? There is no 21st month!

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) **<u>Click CONFIRM at the bottom of the screen</u>**.



You have now entered your Workers into the system. They will appear on your main 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.

If the system only uploads some of the rows it is usually explained by a duplicate email or cell number within your file itself. In this case, it will intake the first row in which the unique identifier appears but then stop when it finds the second.

This most often happens when there are duplicate records in your original data. Just remove the duplicate row and reload the rows below it from your file.