

Clinical Learning Australia
Training Guide



QUICK REFERENCE GUIDE FOR
CLA ADMINISTRATORS

HOW TO IMPORT USERS IN BULK

This quick reference guide provides information on how to import users into Clinical Learning Australia (CLA) in bulk. This guide will explain what information is required and optional data that can be associated with a user account.

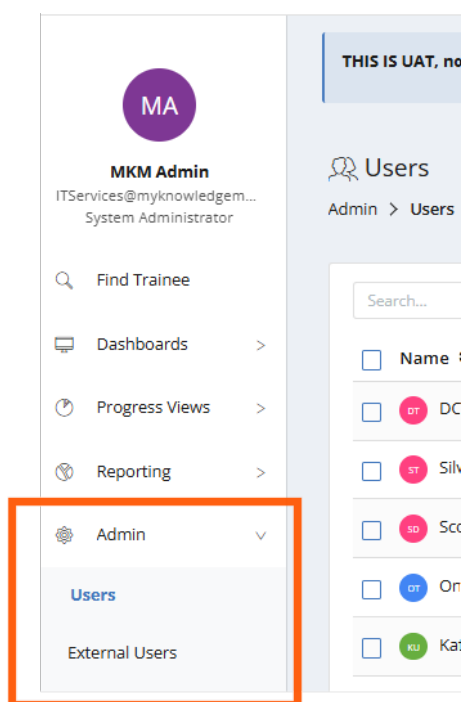
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1 Users and External Users – A Summary

Within CLA there is a differentiation between users and where they are managed. Within the menu items there is "users" and "external users."

See updated menu options below:



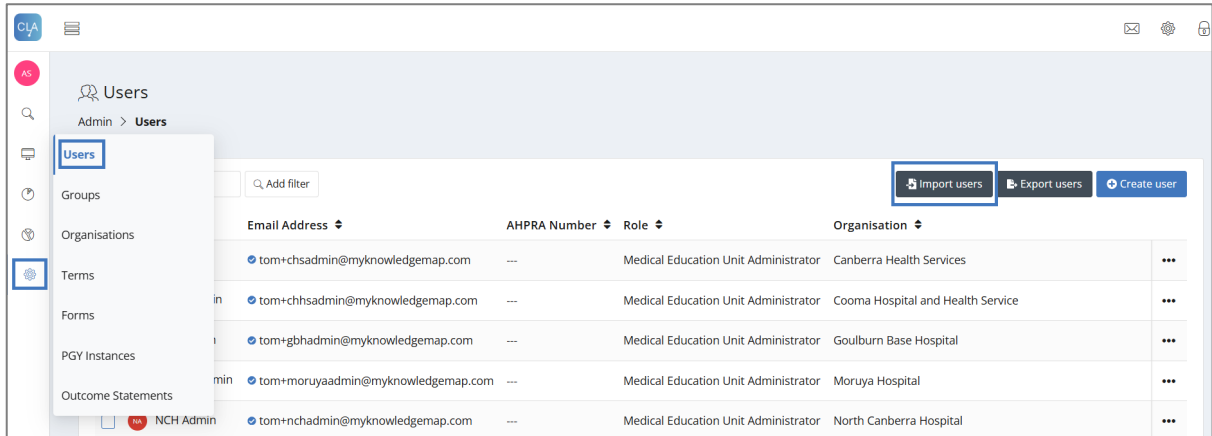
- **Users** – Users with specific roles within CLA. For example - Trainee’s, Administrators, Medical Education Units (MEU’s), Directors of Clinical Training (DCT’s), System Administrators, Assessment Review Panel (ARP) Lead, ARP Member, Directors, Nationwide Administrator, Report Only, State Administrators.
- **External Users** – A user linked to a Term or via trainee allocation. For example - Clinical or Term Supervisors and Guest Assessors.

2 Creating users in bulk

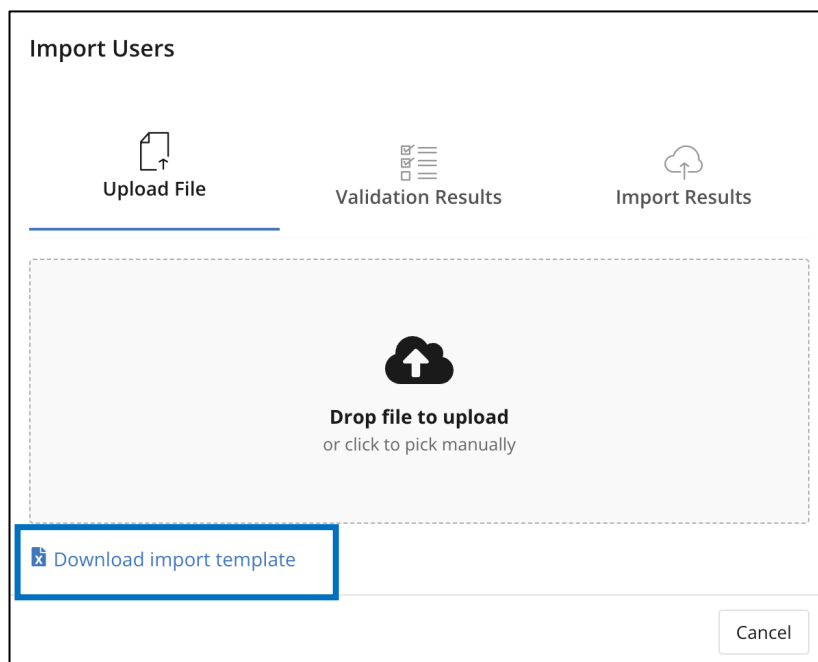
Medical Education Unit / Administrator users of CLA can create users in bulk via a **user import spreadsheet**.

2.1 Where to import users in bulk

- Navigate to the 'cog' icon on the left-hand menu bar and click 'Users' or "External users" as required
- Click the 'Import users' button



A pop-up box will appear with the option to 'Download import template' – click on this.



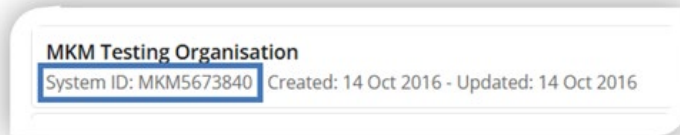
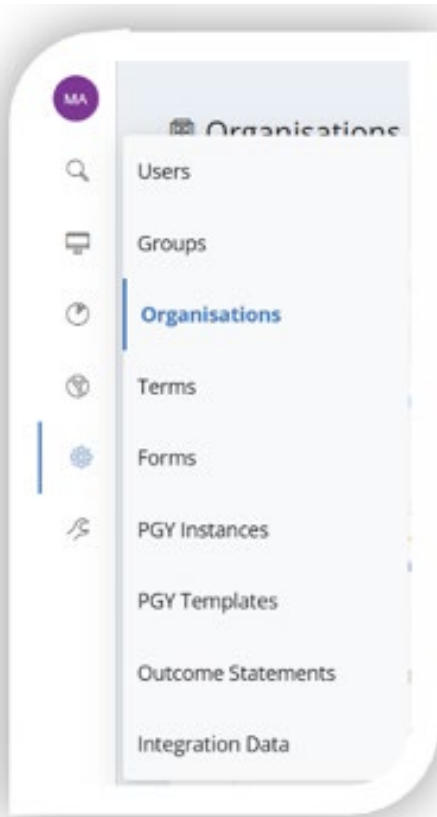
This will download an excel spreadsheet to your device which you can use to enter user details in bulk.

2.2 Completing the User Import Spreadsheet

Complete the below fields in the spreadsheet, ensuring you enter each user on a different row.

| Field Name | Field Description | Field Type |
|-----------------------|--|------------------|
| UserIdentifier | <ul style="list-style-type: none"> This field is only required if you are updating a user account that already exists, it can remain blank if you are creating a new user. Where you are updating a user account that already exists, include the existing users email address in this field. | Optional |
| FirstName* | <ul style="list-style-type: none"> Enter the user's first name. If a user doesn't have a legal first name, enter a dash '-' in the first name field. If entering a prefix and/or middle names, include these in the FirstName field. | Mandatory |
| LastName * | <ul style="list-style-type: none"> Enter the user's last name. | Mandatory |
| Email * | <ul style="list-style-type: none"> Enter the user's email address. There can only be one user profile with a unique email address. This should be their professional email address. Email addresses can be updated later and will not impact the continuity of the trainee's assessment profile or other user's access to the system. | Mandatory |
| OrgReference * | <ul style="list-style-type: none"> This reference links a user to a specific organisation in CLA. The organisation a user is linked to should be relevant to their role and be an organisation that they have permission to have to access to information for. You will need to enter the relevant CLA reference number for the organisation that you want to link the user to. Note. The OrgReference in the spreadsheet must match that in CLA for the upload to work correctly and for the users to be linked to the correct organisation. This OrgReference can be found within the 'Organisations' area of CLA. <ul style="list-style-type: none"> Navigate to the 'cog' icon on the side toolbar bar and click 'Organisations.' Find the organisation that you want to link the users to. Below the heading of each organisation is a 'System ID,' copy this reference and enter it into | Mandatory |

the 'OrgReference' column in the upload spreadsheet (see screen shot below).



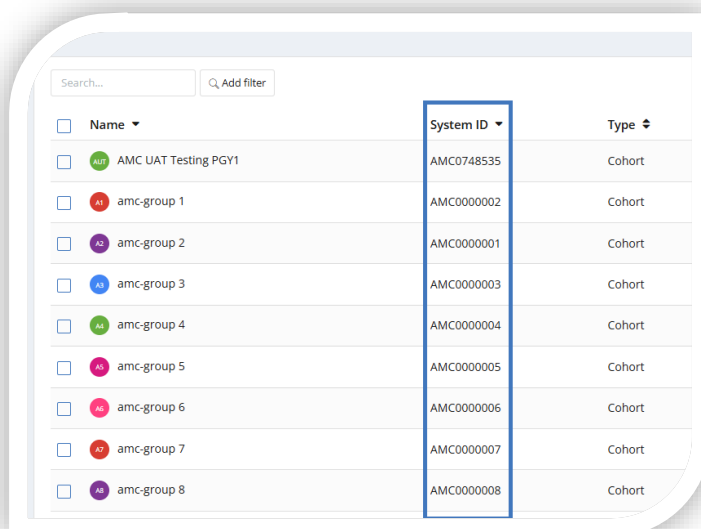
| | | |
|----------------------|--|-------------------------|
| <p>Role *</p> | <ul style="list-style-type: none"> • This is the role that will be associated with a user. Different roles have different permissions to perform functions within CLA. • The following roles are available to assign users to: <ul style="list-style-type: none"> ○ Medical Education Unit Administrator ○ Director of Clinical Training ○ Executive Director of Medical Services ○ Medical Education Officer ○ Trainee • See the Role Types section at the end of this document for more information on what each role can do in CLA. • Note 1: Role names must be written into the spreadsheet using the exact names above. | <p>Mandatory</p> |
|----------------------|--|-------------------------|

| | | |
|------------------------------------|--|------------------------|
| | <ul style="list-style-type: none"> • Note 2 – If importing Supervisors, you leave the role column empty. You can upload Supervisors through both the normal Users page, as well as the External Users page. | |
| UserStatusName | <ul style="list-style-type: none"> • This field can be left blank. | Not Required |
| AHPRA Number | <ul style="list-style-type: none"> • This is the AHPRA Registration Number that is for any healthcare practitioner who is registered to practice in Australia. • This is not a mandatory field but should be entered for all medical professionals using the system (i.e. PGY doctors, supervisors, Directors of Clinical Training etc.) where it is known. | Optional (Recommended) |
| Reference | <ul style="list-style-type: none"> • This field is not relevant to CLA and can be left blank. | Not Required |
| State/Territory | <ul style="list-style-type: none"> • State or Territory the User is linked to | Mandatory |
| Hospital and Health Service | <ul style="list-style-type: none"> • These fields are only relevant if you wish to include further information in a user's profile to help identify that user, e.g. states who manage Administrator users centrally, may want a quick reference to the hospital, facility, health service they reside within. • Note that the jurisdiction should be formatted as the state/territory abbreviation, e.g. NSW, WA etc. | Optional |
| Phone | <ul style="list-style-type: none"> • A phone number can be provided for a user if required. • The preferred format for phone numbers is 0x xxxx xxxx for landlines and 04xx xxx xxx for mobiles. • This field is not mandatory. | Optional |
| SendVerification | <ul style="list-style-type: none"> • This field is to identify if you want a welcome email to be sent to new users immediately upon setting up their account via bulk upload. • By default, this is set to 'false,' meaning a welcome email won't be sent at the point of importing the users if the field is left blank. • Any users who don't have a welcome email sent straight away can be sent it in the future when required. • If you wish to send welcome emails at the point of importing users, put 'true' in this column. | Optional |

GroupReference

- This is a specific identifier for a group that already exists within the system that you want to add users to.
- This is not a mandatory field and can be left blank, but users created through this process will need to be added to a group later within the system.
- **Note:** A group must exist before you can add users to it. It is recommended when uploading users in bulk to first create the relevant group in the 'Groups' area of the system and then use the bulk upload process to assign users to that group. Administrator users can create groups as required to manage trainees within their hospital or health service.
- The GroupReference to be included in the upload spreadsheet can be found within the 'Groups' area of the side-bar menu. Find the relevant group, copy the 'System ID' and paste this into the GroupReference field of the spreadsheet.

Optional



| Name | System ID | Type |
|----------------------|------------|--------|
| AMC UAT Testing PGY1 | AMC0748535 | Cohort |
| amc-group 1 | AMC0000002 | Cohort |
| amc-group 2 | AMC0000001 | Cohort |
| amc-group 3 | AMC0000003 | Cohort |
| amc-group 4 | AMC0000004 | Cohort |
| amc-group 5 | AMC0000005 | Cohort |
| amc-group 6 | AMC0000006 | Cohort |
| amc-group 7 | AMC0000007 | Cohort |
| amc-group 8 | AMC0000008 | Cohort |

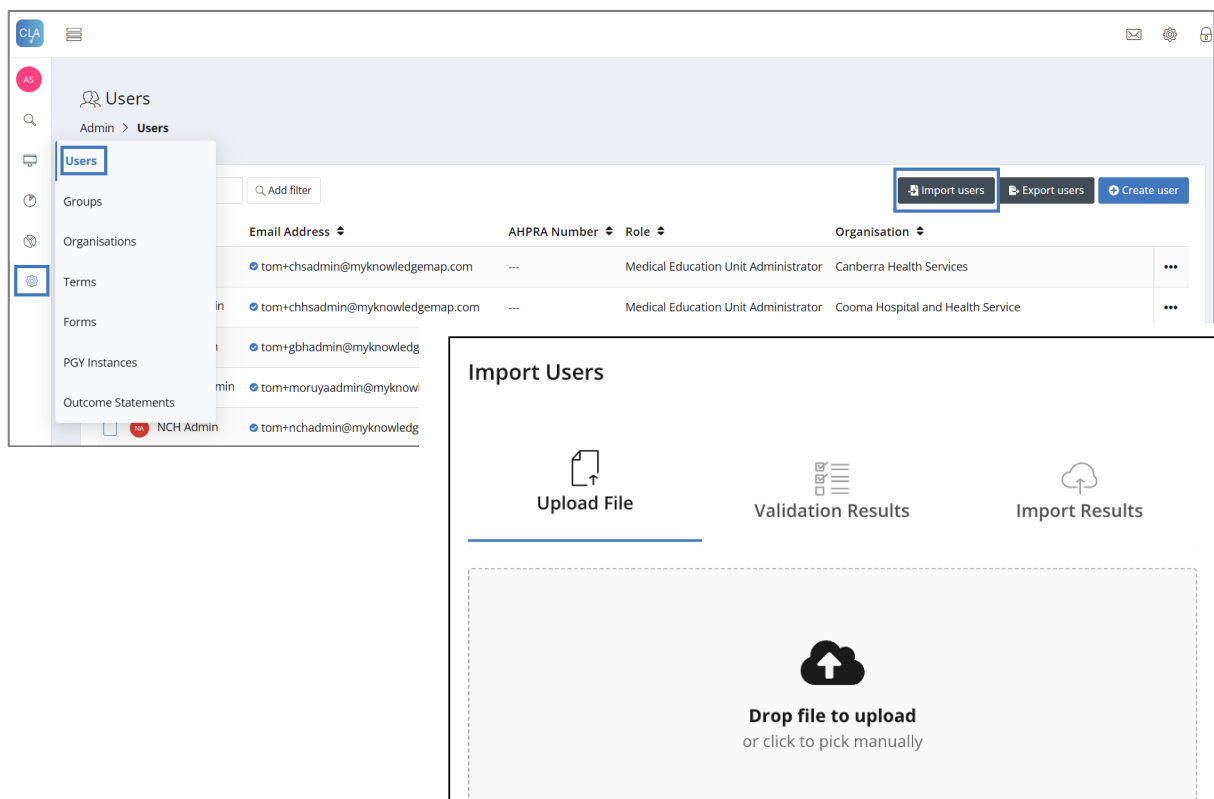
- If a user needs to be a DCT or EDMS as well as an administrator, then ensure you add them to the same Groups as you have created for the Trainees. If they need to be linked to more than one Group, e.g. PGY1 and PGY2, add an additional column to the Import Spreadsheet GroupReference1, and so on, and enter the additional group System IDs.
- See the quick reference guides [Creating and managing groups](#) for more information about groups.

Important: In situations where the DCT or EDMS have an additional role in CLA, for instance primarily an MEU Administrator, after importing the User spreadsheet, go to Groups, locate that user, and use Assign Role to make their role DCT or EDMS within that group.

2.3 Uploading the User Import Spreadsheet

Once you have completed the user import spreadsheet, save it to your desktop or another local file location. Navigate back to the **Users** or **External Users** screen in CLA, select '**Import users**' and click the '**Drop file to upload**' icon to upload your file.

Note – Admins can import both Users and External Users via either the Users or External Users import – the users when imported, will be linked to the appropriate menu area.

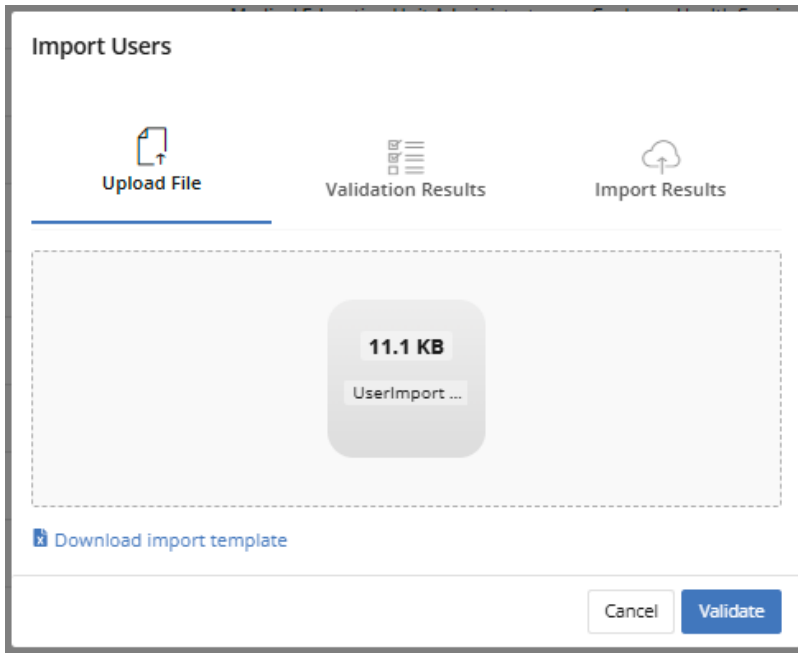


The screenshot displays the CLA system's 'Users' management page. On the left, a navigation menu is open, highlighting 'Users'. The main content area shows a table of users with columns for 'Email Address', 'AHPR Number', 'Role', and 'Organisation'. A table with the following data is visible:

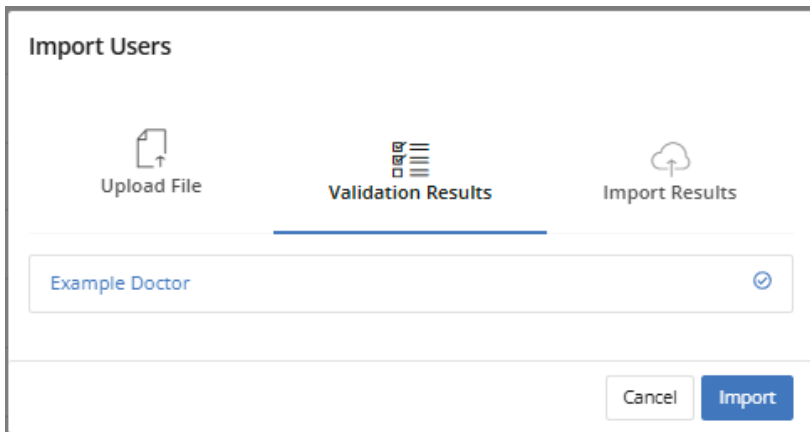
| Email Address | AHPR Number | Role | Organisation |
|----------------------------------|-------------|--------------------------------------|-----------------------------------|
| tom+chsadmin@myknowledgemap.com | --- | Medical Education Unit Administrator | Canberra Health Services |
| tom+chhsadmin@myknowledgemap.com | --- | Medical Education Unit Administrator | Cooma Hospital and Health Service |
| tom+gbhadmin@myknowledg | | | |
| tom+moruyaadmin@myknow | | | |
| tom+nchadmin@myknowledg | | | |

At the top right of the table area, there are buttons for 'Import users', 'Export users', and 'Create user'. An 'Import Users' dialog box is overlaid on the right side of the screen. It features three tabs: 'Upload File', 'Validation Results', and 'Import Results'. The 'Upload File' tab is active, showing a large dashed box with a cloud and upload icon, and the text 'Drop file to upload or click to pick manually'.

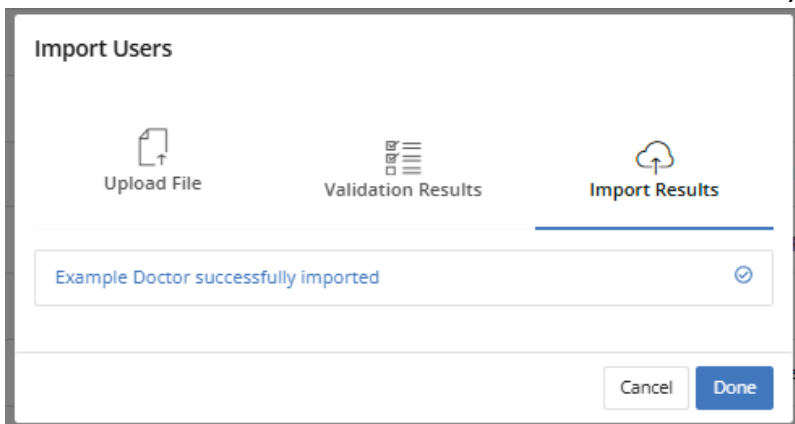
The screen will display the size and name of the file you are importing. Click **Validate**.



If there are no issues with the data, the names of the users being imported will be displayed with a blue tick. Click **Import**.

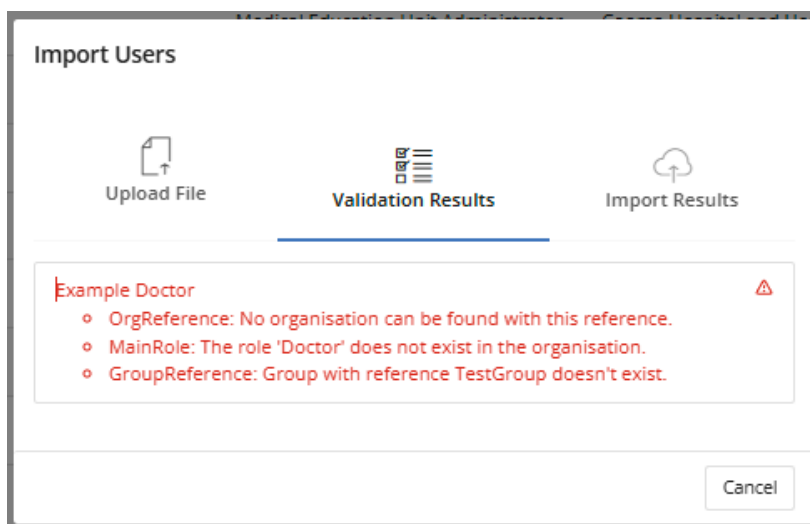


You will see a notification that the data has been successfully imported. Click **Done**.



Data validation

The data in your spreadsheet undergoes a validation process as part of the data upload process. If there are any errors with the data being uploaded, for instance duplicate AHPRA numbers or email addresses, OrgReference not matching an existing one in the system, MainRole not matching an existing role, invalid GroupReference, these will be flagged on the screen for review.



Review your user import spreadsheet, make necessary corrections, save the latest version, and try to upload again.

3 Role Types

| Role | Definition |
|--|--|
| Trainee | <p>A Trainee is a prevocational doctor in their first or second year, also known as a PGY1 or PGY2 doctor. This role allows the user to access CLA as a trainee, complete self-assessment forms, view mid/ end of term assessments, EPAs completed for themselves and email assessment forms to supervisors to complete later</p> <p>Trainees will have access to an ePortfolio when assigned to a group and instance – see the quick reference guides Creating and managing groups and Creating and managing PGY instances.</p> |
| Director of Clinical Training / Executive Director of Medical Services | <p>This role provides access to view all trainees within a particular organisation to track and monitor training progress and assessments.</p> <p>DCTs and EDMS' will need to be added to the same Cohort Groups as their trainees. This is especially important in instances where the</p> |

| | |
|--------------------------------------|--|
| | DCTs also have an MEU Administrator role. See the Creating and managing groups quick reference guide for additional information. |
| Medical Education Unit Administrator | This role provides access to all administration functions for the organisation to which the user is assigned. This includes the ability to create and manage user accounts, create and manage groups and instances, create and manage term allocations, view and track training progress and assessments for trainees assigned to that organisation or any organisations below (where applicable). For situations where a user requires both the MEU Admin role for an organisation and a DCT role in relation to a group of Trainees, set their Main role as MEU Admin and add them to the trainee Group, assigning them the role of DCT within the Group. |
| Medical Education Officer | This role can perform the same functions as a Medical Education Unit Administrator except for creating and managing user accounts. |
| Statewide Administrator | This role can only be assigned by Administrator users that already have statewide access. It provides administration access to all organisations within a particular state or territory. |

Note: All roles can only view information within the organisational entity to which they are assigned and any organisational entities below (where applicable) or, in the case of term and clinical supervisors, for the duration of the term in which they are supervising the trainee (note supervisors will have until the end of the Grace Period set in the PGY Instance for the term to complete any outstanding assessments.)

*EPAs can also be completed by guest assessors.

Note: Any responses done by an unapproved guest assessor will be flagged until an administrator approves the guest assessor as being a valid person.

4 Support

For local set up issues, contact your MEU Administrator.

For system queries, refer to the [CLA website](#), user guides and support contacts.