Customer Onboarding To Do List

Cloud Onboarding · https://cclearninghub.co.uk/docs/customer-onboarding-to-do-list/

Cloud Onboarding To Do List

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This page contains everything you need to get started with Care Control Cloud. We've outlined all the essential steps to help ensure a smooth and successful setup, so you can make the most of your Care Control experience from day one.

If you need any help along the way, our friendly Support team is always here to assist you, don't hesitate to get in touch.

Bulk Loading Staff

CSV Uploading Interactive Guide

Embedded media:
https://demo.arcade.software/WWWIwYMmjddYoQXIfmBV?embed&embed_mobile=tab&embed_desktop=inline&show_copy

CSV Uploading Written Guide

1. When in the **HR App** click the **Bulk Load Staff** option at the top right of the screen.
2. Select **Download CSV File.** This will download a template CSV file which you can use as a guide.
3. When you have modified your CSV file, select **Upload CSV File** and choose your file.
4. If there are any issues you will see red error text describing how many **Validation Issues** you have.
5. Use the **Scroll bar** at the bottom of the page to find the issues and amend them.
6. On our example, the **Primary Contact Number** was missing. Input the correct details to amend the issue.
7. When happy with your details, select **Save & Bulk Load Residents Data.**

Manual Uploading Interactive Guide

Embedded media:

https://demo.arcade.software/XreTfyAUZ5j7I7tE7rXW?embed&embed_mobile=tab&embed_desktop=inline&show_copy_link

Manual Uploading Written Guide

As well as uploading a CSV file with all of your staff members in, you also have the option to manually input the data for your staff.

At the bottom of the screen you can input the details manually. Follow the screen until the end and input all of the required details, they are marked with an asterisk.

When you are happy with the details, scroll to the end of the page and select the plus icon to add the staff member.

Bulk Loading Service Users

CSV Uploading Interactive Guide

Embedded media:
https://demo.arcade.software/LyzHirhVyqXbq6elPrzk?embed&embed_mobile=tab&embed_desktop=inline&show_copy_link=

CSV Uploading Written Guide

1. When in the **Admin App** select **Visit** in the **Client Area** box.
2. Select **Visit** within the **Add New Service User** box.
3. Click **Bulk Load Residents.**
4. Select **Download CSV File.** This will download a template CSV file which you can use as a guide.
5. When you have modified your CSV file, select **Upload CSV File** and choose your file.
6. If there are any issues you will see red error text describing how many **Validation Issues** you have.
7. Use the **Scroll bar** at the bottom of the page to find the issues and amend them.
8. On our example, the **Marital Status** was incorrect. Click the drop down menu to select the correct item.
9. When happy with your details, select **Save & Bulk Load Residents Data.**

Manual Uploading Interactive Guide

Embedded media:
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Manual Uploading Written Guide

As well as uploading a CSV file with all of your service users within, you also have the option to manually input the data for your service users.

At the bottom of the screen you can input the details manually. Follow the screen until the end and input all of the required details, they are marked with an asterisk.

When you are happy with the details, scroll to the end of the page and select the plus icon to add the service user.

CSV Troubleshooting

Building your CSV

ID – A unique identifier for the upload. Can also be 1, 2, 3 etc

Date of Birth – Needs to be in DD/MM/YYYY format

Start Date – Start Date of their role with the company, needs to be in DD/MM/YYYY format

Role and Category – can be anything for example, Category – Management | Role – Registered Manager

Security Level – This is what access the staff member needs to the Care Control Applications.

- **Basic** = This is typically for Care/Support Staff who need Basic access to only record Care Planning Information and do day to day recordings
- **Advanced** = This is typically for Seniors/Team leaders who can help review care plans using the Care Control Mobile Application
- **Administrator** = This is for Management who need full access to all areas within the applications

Administer Medication field – This needs to be set to Yes or No depending on if the staff member will need access to the eMAR application

Kitchen Management field – This needs to be Yes or No depending on if the staff members will need to access the Kitchen Menu on the Care Control Mobile application

Set up Type – This can be PIN ONLY (please enter this in capitals)

Post Code and Telephone Numbers – Please ensure there are no spaces in between these digits

Type Column – This can be set to:

- Full Time Resident
- Home Care
- Day Care
- Respite

Title 2/Forename 2/Surname 2/Address Line 2 Columns – These details will be for the service user’s Primary Contact/Next of Kin

Data Formatting Issues

Issues like date format mismatches or invalid email addresses won’t prevent the CSV from being uploaded. Instead, the invalid values will be entered into the cloud version of the form, where built-in validations will highlight the errors and provide descriptions to guide the user in correcting them.

System Specific Constraints

Uploading 1,000 or more rows may cause performance issues.

We recommend keeping the CSV file size under 100KB for optimal processing.

Slow or Unstable Internet

If the connection drops, the upload may fail.

Server Errors

Our system might be down or experiencing high load. You can check Care Control Service Status **here.**

Managing Permissions

Within Care Control Cloud there are multiple approaches to setting permissions for users. First, you will need to bulk load the users. For this you can use a similar CSV to the one you used for bulk loading staff members, as it will automatically attach the staff member to the user. You can then create custom permission roles or modify the ones that already exist within Care Control. This guide will also show you how to bulk apply permission roles to ensure your setup is efficient.

Bulk Loading Users

Bulk Loading Users Interactive Guide

Embedded media:
https://demo.arcade.software/AJiwuU51r6B56uOUFQ0G?embed&embed_mobile=tab&embed_desktop=inline&show_copy_li

Manually Bulk Loading Users Written Guide

1. Enter the **Org Management** App.
2. Select **Visit** under **Users.**
3. Click **Bulk Load Users.**
4. You can manually input the user by using the boxes at the bottom of the page. Start by selecting their **Title.**
5. Then enter a **Forename** and **Surname.**
6. Select which **Position** they are under.
7. Choose their **Department.**
8. Enter their **Email Address** and **Phone Number.**
9. Choose their **Default Language.**
10. Choose the level of **Analysis** they will have access to.
11. Select their **Access Mode.** App Only Access means they can only enter Cloud from Windows. Full Access means they can sign in from anywhere.
12. Select if you want to **Skip Mapping.** If you select No they will be automatically mapped to an existing staff member.
13. Choose their **Access Role.** You can pick up to 5.

14. Select the **Plus Button** when done.
15. Select **Bulk Load Users** to finish uploading the users.

Using a CSV File to Bulk Load Users

1. **Download the CSV Template.**
2. Modify the CSV template using Microsoft Excel or Google Sheets.
3. You can Copy & Paste from existing documents to make this easier. We also recommend downloading the CSV template after manually inputting a user into Care Control, this will give you a user to work from when creating new guides.
4. When you have completed your csv, select **Upload CSV Template.**
5. Scroll through the users to ensure there are no errors. If you see an error, click the box where the the error says **This field has an invalid value** to fix it.
6. Select **Bulk Load Users** to finish uploading the users.

If you have any problems with the CSV File please refer to the CSV Troubleshooting section of this page.

Permission Management

Permission Management Interactive Guide

Embedded media:

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Permission Management Written Guide

1. 1. In the dashboard hub, **click the ‘Org Management’ app.**
   2. Next, **click the ‘Visit’ button** under Permissions.
   3. You will then be directed to the Permission Management dashboard. Here is where you can see all the Cloud permissions for all of the apps. From here you will be able to control and manage the level of access which users, departments and positions have for each of the apps.
   4. **The Permission Roles tab is where you can set up what you can and can’t access.** This will then get assigned to the user/department or position.
   5. Here you will be able to see different tabs for each app.
   6. For this example, let’s go back into the **‘Admin’ tab.**
   7. Let’s click the ‘Department Permissions’ tab.
   8. To add a department permission, **click the ‘Department Permission’ button.**
   9. You will then be able to enter the department type, the site and add any associated permission roles by selecting **‘Add Permission Role’ button.**
   10. Next is the **‘Position Permissions’ tab.**
   11. You can also add a Position Permission by clicking the **‘Position Permission’ button.**

12. Here you can add the position, site and any associated permission roles by clicking the **‘Add Permission Role’.**
13. Next is the User Permission.
14. Here you will be able to see user permissions. **Next, click the eye icon.**
15. Here you can see what permission role this user has. You can also add more by **clicking the ‘Add Permission Role’.**
16. Let’s go back into the ‘Permission Roles’ tab.
17. You also have the option to edit a specific permission role by clicking the pencil icon.
18. Here you will see a list of functions by clicking the drop down arrows.
19. You also have the option to select whether you want this specific user to have access to edit / read only certain roles.
20. Once you have made amendments, make sure you **click the ‘Save’ button.**
21. You also have the option to create a permission role by **clicking the ‘Create Permission Role’.**
22. Here you can name the permission role.
23. You also have the option to set as the default permission role.
24. **Make sure to click the ‘Save’ button.**

Bulk Adding Permissions

Bulk Adding Permissions Interactive Guide

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Bulk Adding Permissions Written Guide

1. For this guide, you will be shown a few examples of choosing an action within the ‘Bulk Actions’ tool. To get started, in the ‘My Hub’ dashboard, click the ‘**Org Management’ app.**
2. Next, you then want to click the ‘**Open Wizard**‘ button under ‘Bulk Actions’.
3. Here, you will see a list of available actions. For the first example, I will choose ‘**Add Access Roles**‘.
4. Click the ‘**Next**‘ button.
5. Next, choose the access role for the user you’ll be assigning this to.
6. Once choosing the access role, select the **‘Add’ button.**
7. Next, click the **‘Next’ button.**
8. Then, choose the users you would like to process.
9. Then select the **‘Add’ button.**
10. Click the **‘Next’ button.**
11. You will then see a visual workflow of the following bulk change. Once you have reviewed these changes, make sure to click the **‘Submit’ button at the bottom right.**
12. Another example when choosing an action is **‘Update Position’.** Use the same process and select ‘next’ when done.
13. This will then present a list of positions.
14. You also have the option to search for a position by using the search bar.

15. **Select the position.**
16. You will now need to select the users you want to assign to the updated position.
17. Click the **‘Add’ button** once you had chosen the users. Then click the **‘Next’ button** on the bottom right.
18. You will then see the same page previous to the first example. A visual workflow of the changes you are making to a user’s position.
19. Another example when choosing an action is **‘Add Permission Roles’.**
20. Next, click the **‘Next’ button.**
21. As you’ll see, this action works slightly differently. That’s because it requires you to select both a permission role and a site before proceeding.
22. Here you will see a drop down arrow. You are then able to click these which will showcase the permission roles which are contained within those applications.
23. Once you have chosen the permission role, you can then select the site you want to add it to. You also have the option to search for a site. And if you’d like to make this change globally, do not choose a site and instead, leave this section blank.
24. Once you have chosen the permission role and site, you can then click the **‘Submit’ button to save any changes.**

Was it helpful ?

- Happy
- Normal
- Sad

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