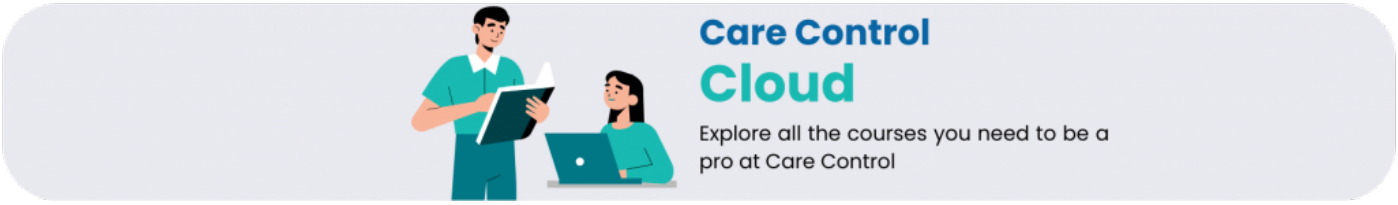
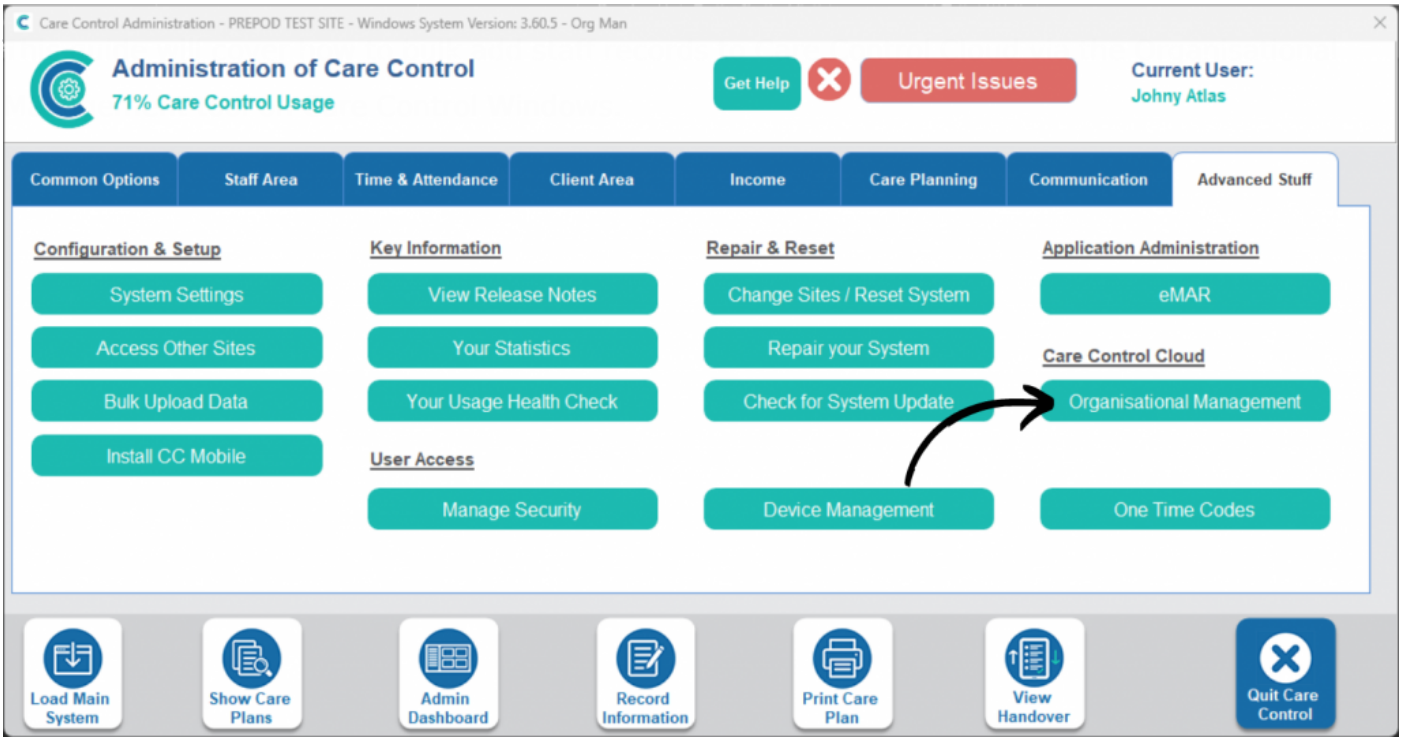
OM Bulk – Add User Records

Windows Org Man Archive · https://cclearninghub.co.uk/docs/om-bulk-add-user-records/



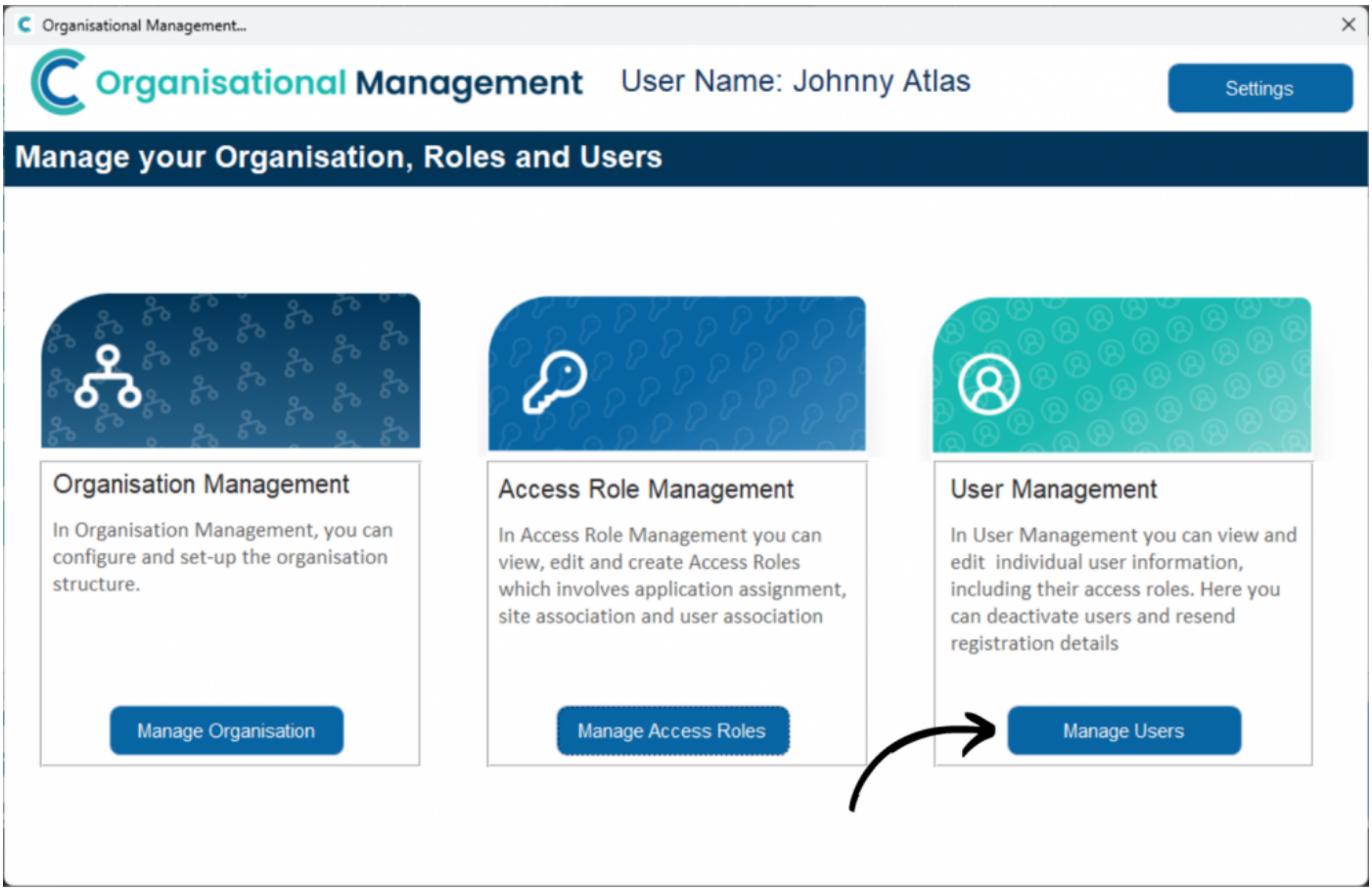
OM Bulk - Add User Records

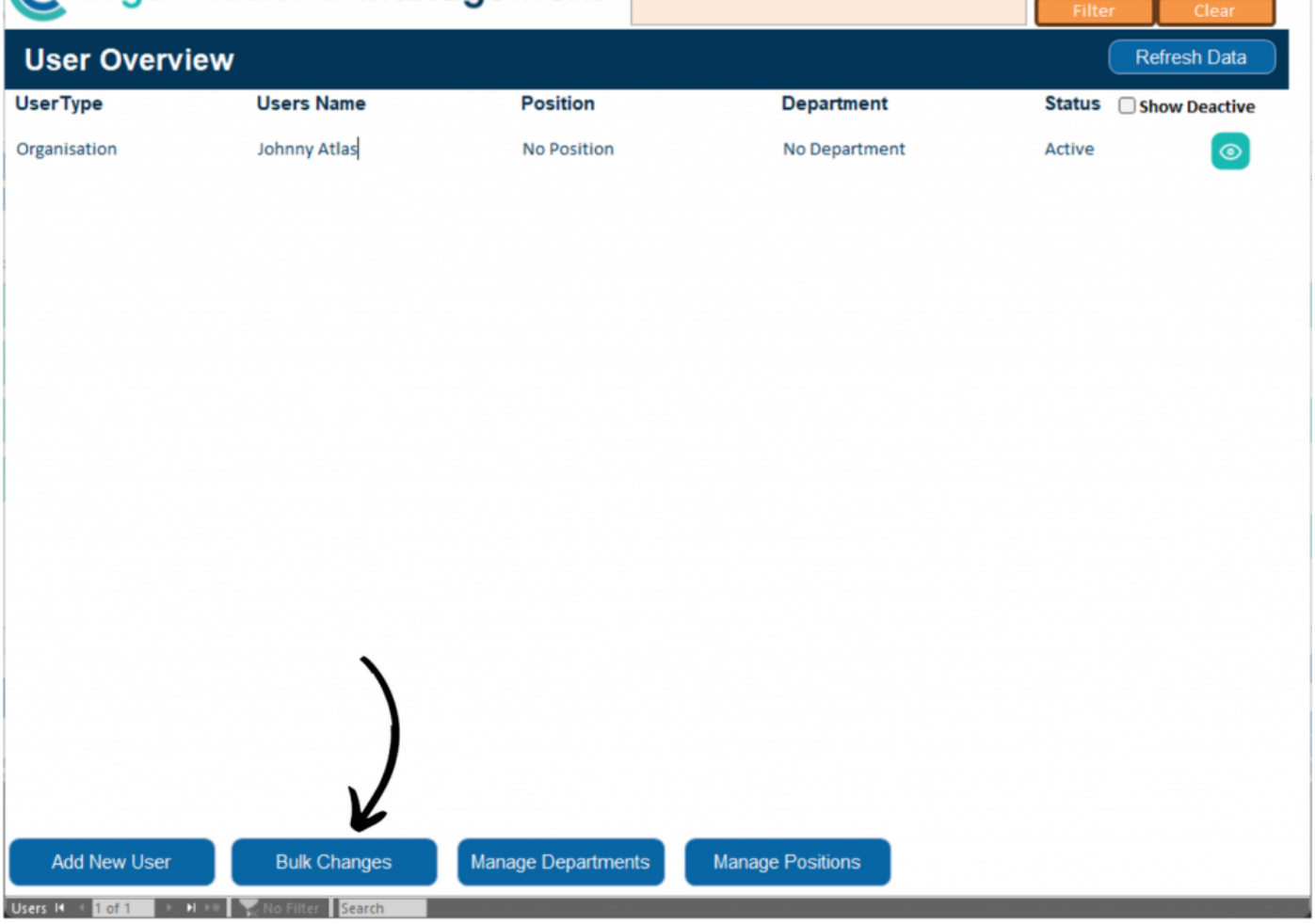


1

In the Administration of Care Control Windows, open the **Organisational Management** tool which can be found under the **Advanced Stuff** tab.

2


Organisational Management...
Organisational Management
User Name: Johnny Atlas
Settings
Manage your Organisation, Roles and Users
Organisation Management
In Organisation Management, you can configure and set-up the organisation structure.
Manage Organisation
Access Role Management
In Access Role Management you can view, edit and create Access Roles which involves application assignment, site association and user association
Manage Access Roles
User Management
In User Management you can view and edit individual user information, including their access roles. Here you can deactivate users and resend registration details
Manage Users



3

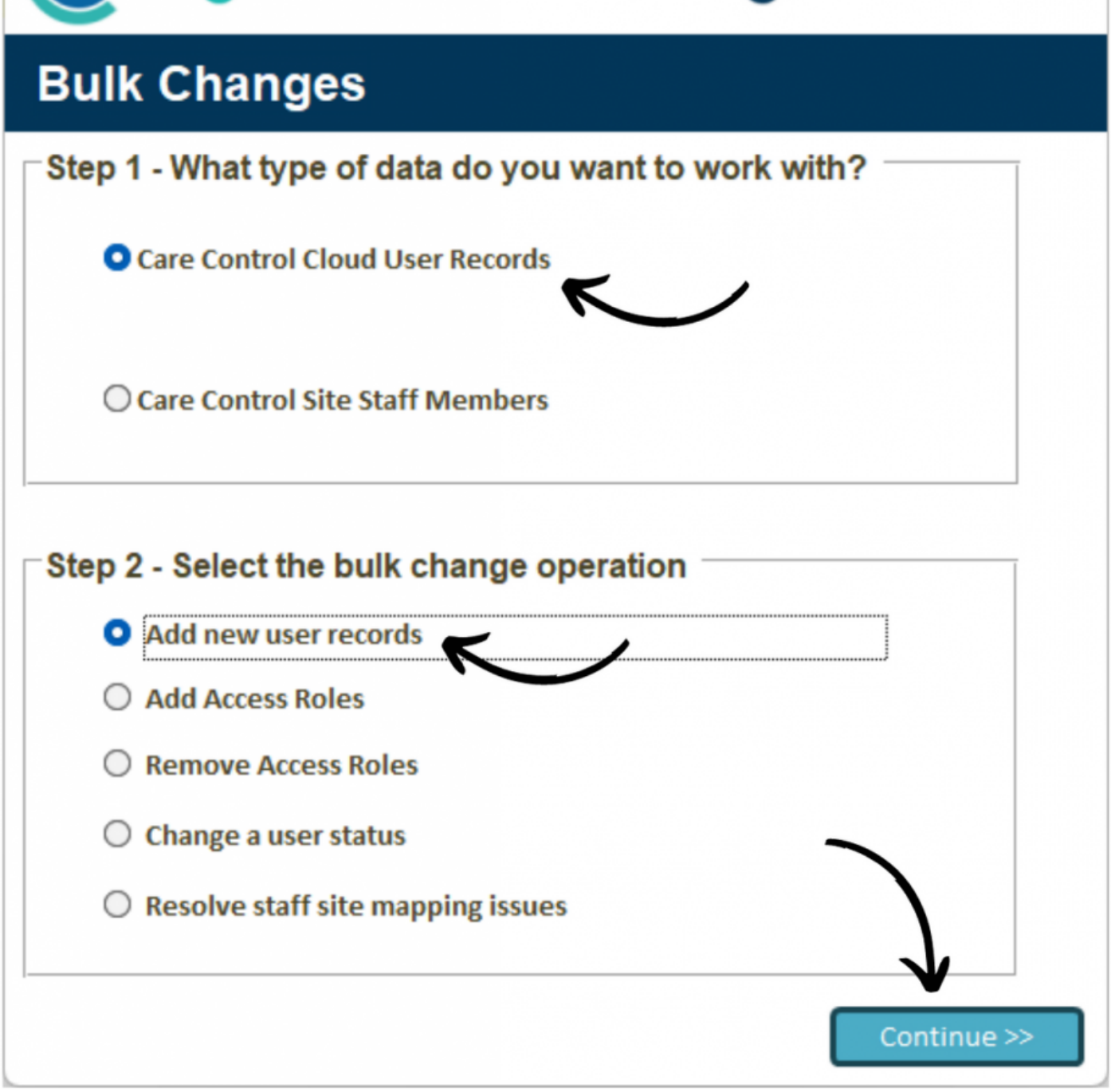
A list of currently active users on CC Cloud will show.

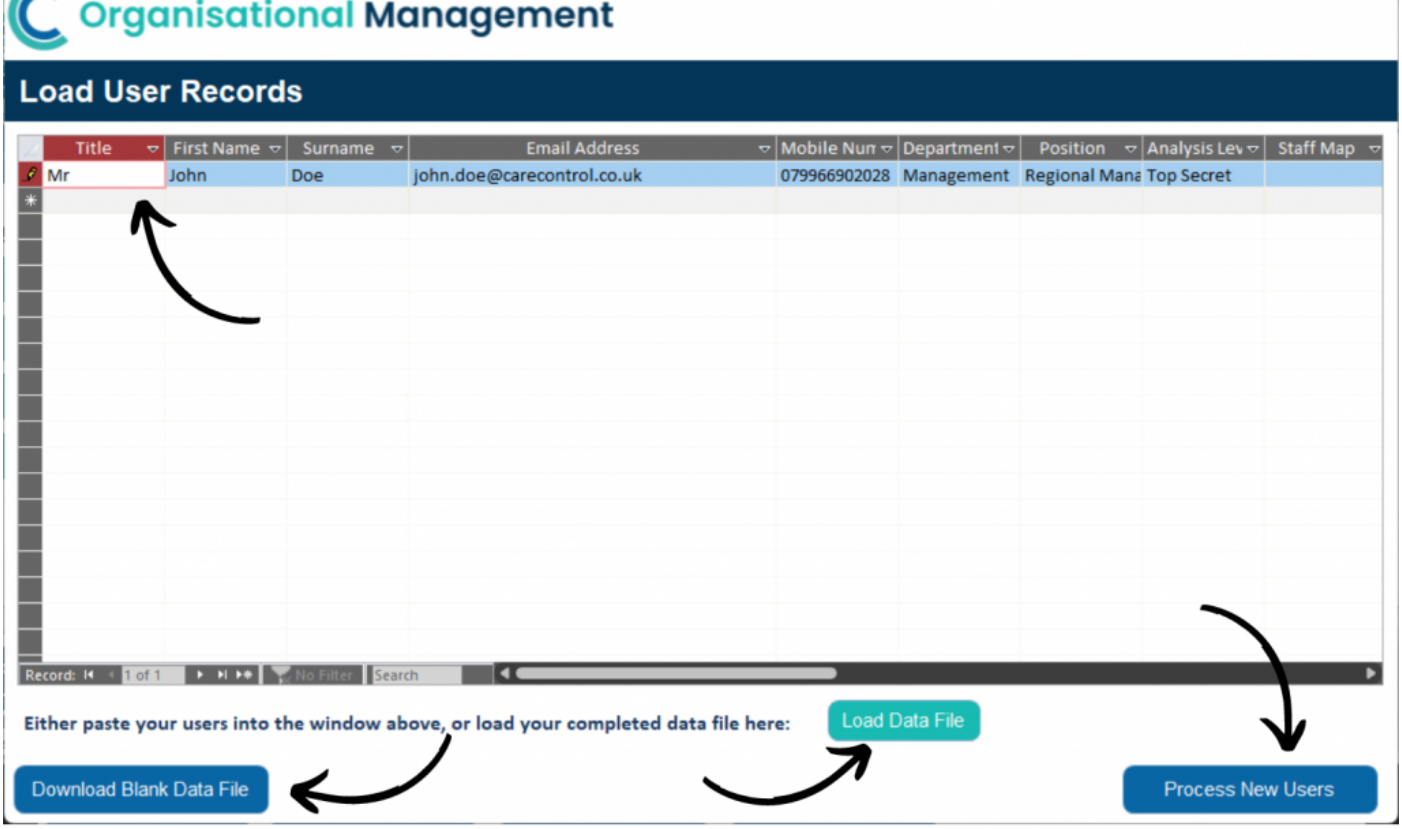
To begin bulk addition, press **Bulk Changes**.

4

A configuration window will open. Here, Select **Care Control Cloud User Records**, then, **Add New User Records**.

Press **Continue**.


Bulk Changes
Step 1 - What type of data do you want to work with?
Care Control Cloud User Records
Care Control Site Staff Members
Step 2 - Select the bulk change operation
Add new user records
Add Access Roles
Remove Access Roles
Change a user status
Resolve staff site mapping issues
Continue >>



5

You will be presented with a blank data entry spreadsheet.

Begin entering the information labelled at the top of each column – each row corresponds to a different staff member.

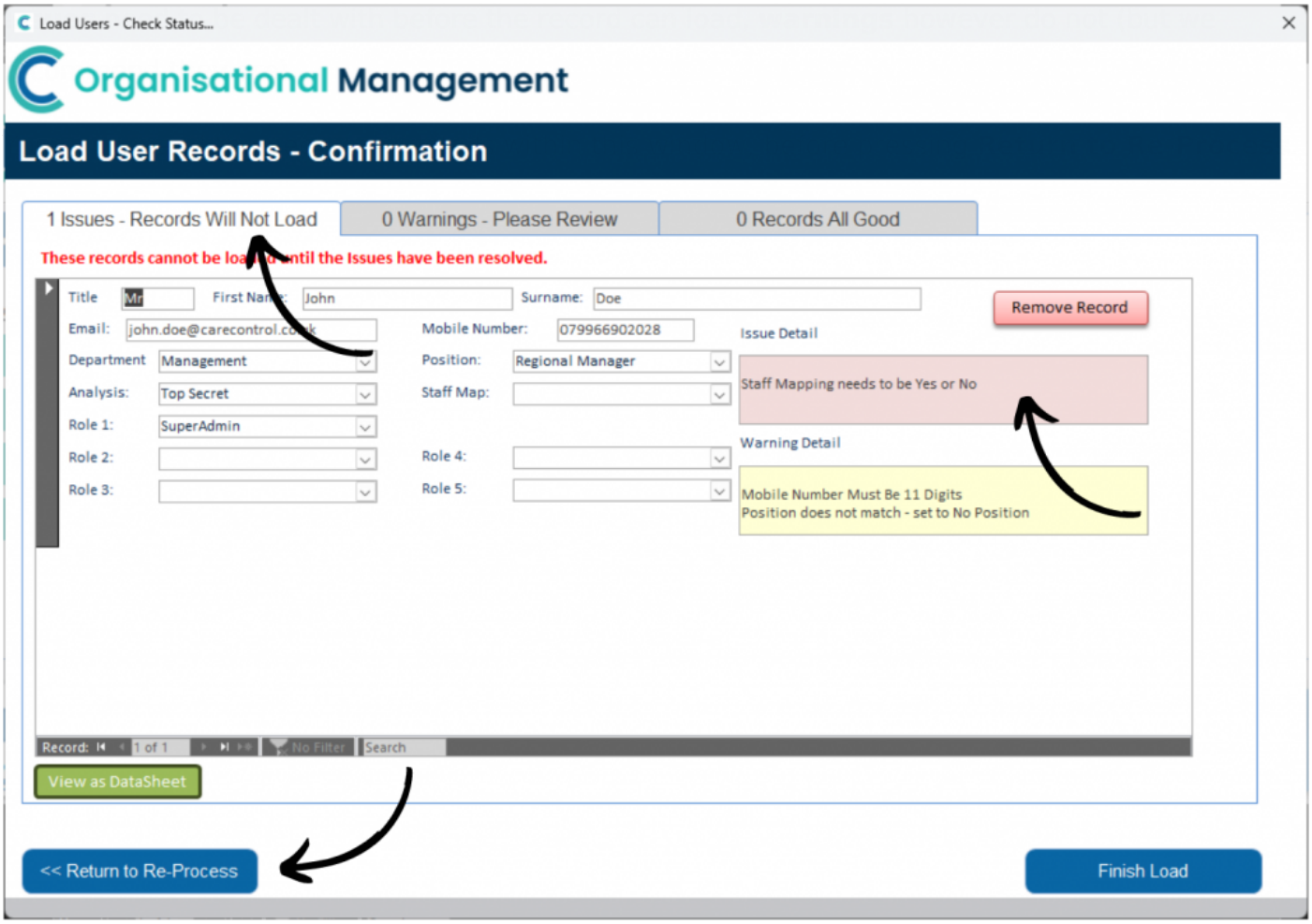
You can also **download a blank data file** to work on in Excel. After doing so, you can then **load** the **data file**.

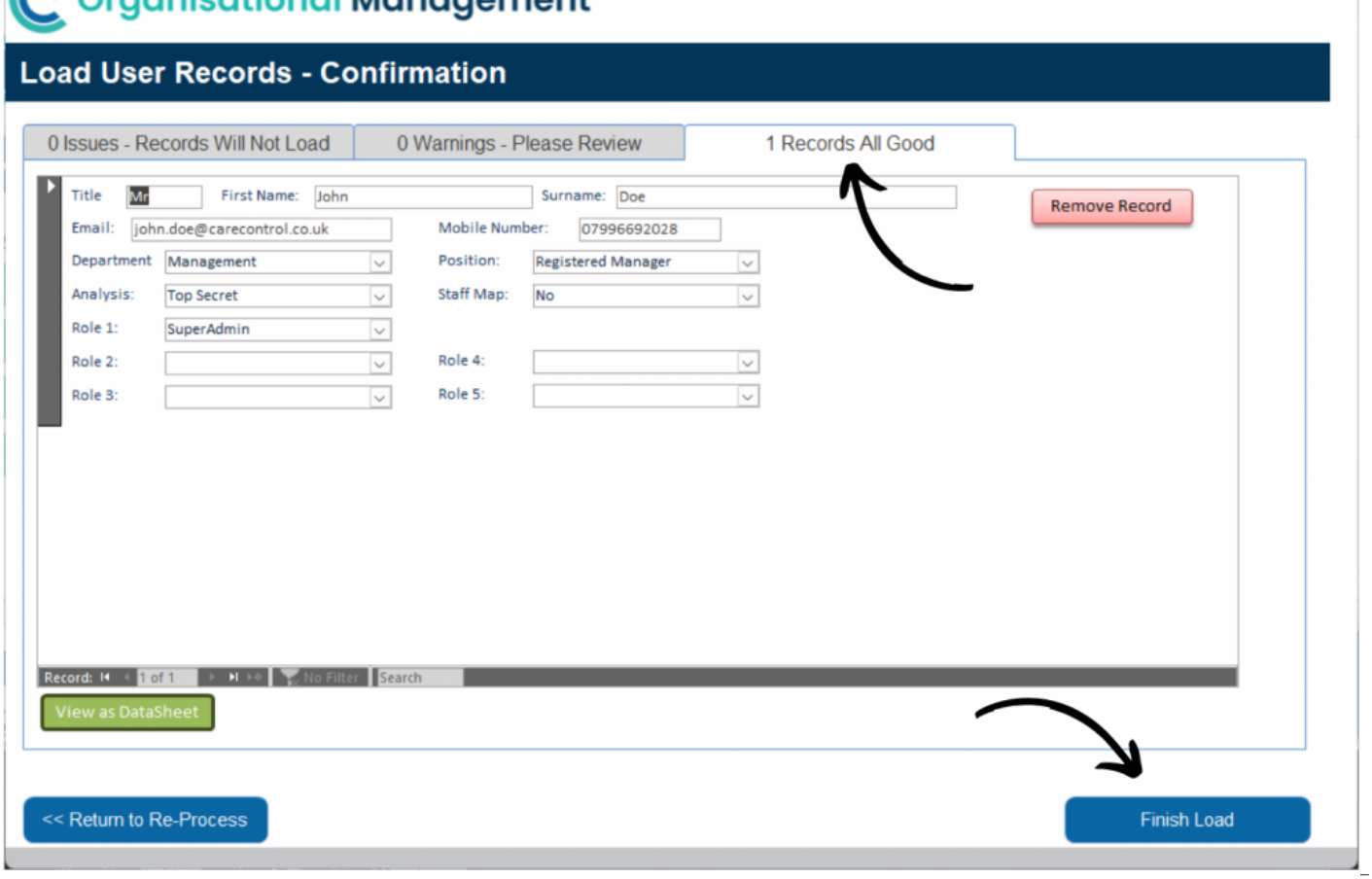
Finally, press **Process New Users**.

6

The next stage of the process helps identify issues with the data loading. In this example, 1 record will not load due to a issue.

The **Issue Detail** will display in the red box on the right hand side, with any other **Warnings** showing in the yellow box beneath.


Load Users - Check Status...
Organisational Management
Load User Records - Confirmation
1 Issues - Records Will Not Load
0 Warnings - Please Review
0 Records All Good
These records cannot be loaded until the Issues have been resolved.
Title
Mr
First Name:
John
Surname:
Doe
Remove Record
Email:
john.doe@carecontrol.co.uk
Mobile Number:
079966902028
Issue Detail
Department
Management
Position:
Regional Manager
Staff Mapping needs to be Yes or No
Analysis:
Top Secret
Staff Map:
Role 1:
SuperAdmin
Warning Detail
Role 2:
Role 4:
Role 3:
Role 5:
Mobile Number Must Be 11 Digits
Position does not match - set to No Position
Record:
1 of 1
No Filter
Search
View as DataSheet
<< Return to Re-Process
Finish Load



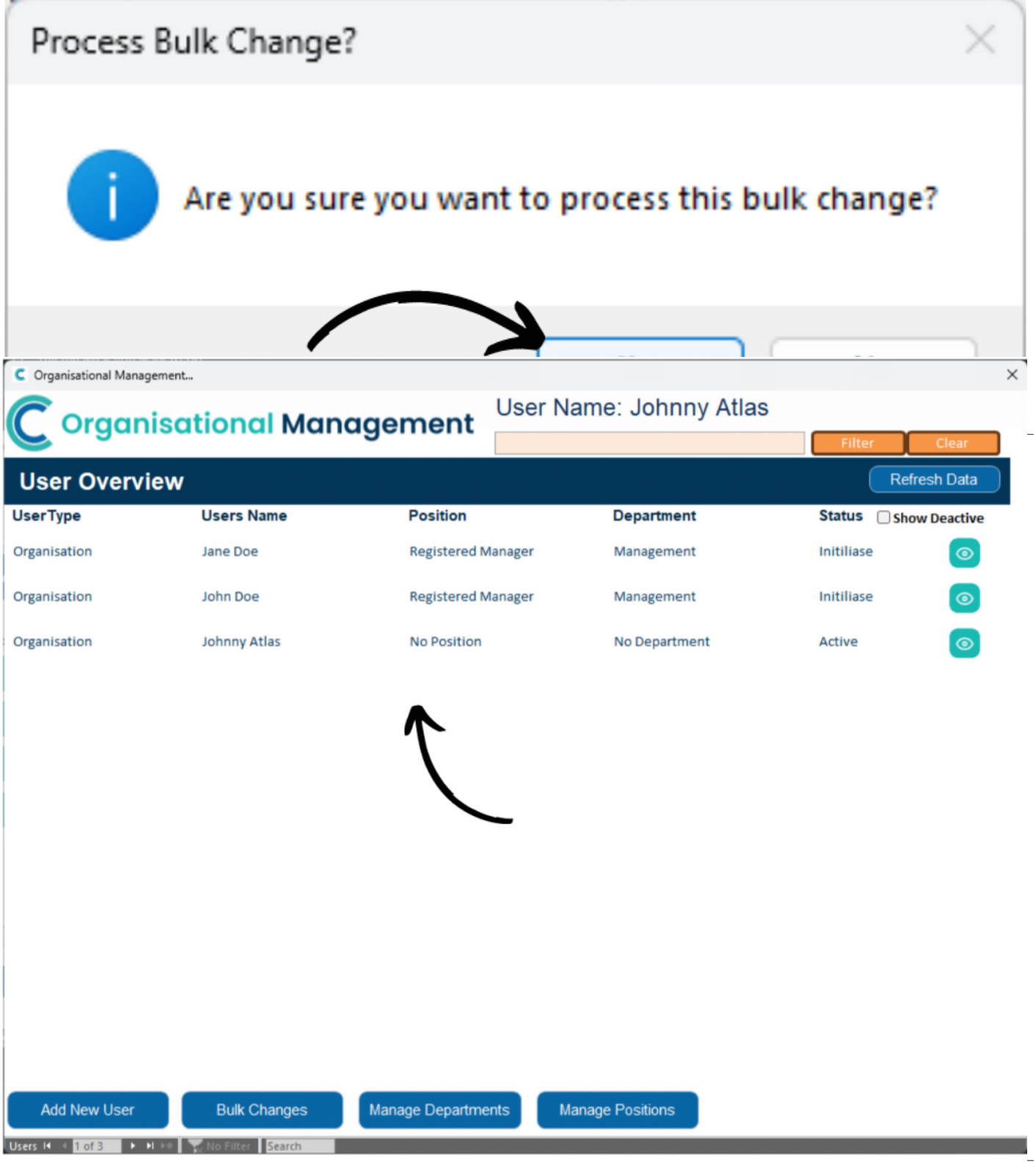
7

You will be taken back to the data-entry sheet. From there press **Process** once again to update the issue/warning screen.

Notice our record has now moved to the '**All Good**' tab. This means we can now press **Finish Load**.

8

Press **Yes** to confirm the processing.



9

Our new staff member(s) have now appeared on the **User Overview** list.