

QUICK START GUIDE - Using the Import Template

This guide assumes that you have logged on to your console and have clicked on Users and Assessments. If you don't know your login information, contact us at EIOOnline@effectivenessinstitute.com or 425-641-7620

PREPARE YOUR IMPORT TEMPLATE

	A	B	C	D	E	F	G	H	
1	FirstName	LastName	EmailAddress	UniqueID	AllowDuplicates	ReportingFlag	Inventory	Teams That Work	Teams
2	First1	Last1	Test1@test.com		Yes	Yes	Behavior Style Self	Operations Team	

FirstName, LastName, EmailAddress These fields can be in any order, but must have these headers
UniqueID Not required, often used for employee ID number
AllowDuplicates If this says "No" anyone who is already in your database will not have new inventory assigned
ReportingFlag Yes means user will be able to view and print their report at the end of the assessment. Choose "No" if you want to hand out the reports at a later date
Inventory If you put the Assessment name here, it will automatically be assigned during the import. If you leave this field blank, you will need to assign inventory later.
TagCategory1 (Optional) Replace this header with an existing Tag Category. Whatever you put in the field(s) below it will be created as a Tag. In this example, "Teams That Work Teams" is the Tag Category and the import process will create the "Operations Team" tag.

→ Save your file

IMPORT THE FILE

1 Click on Users & Assessments

2 Click on Import

3 You will get an Import pop-up. Click on Select template file

Navigate to your saved file and double-click on it

4 Click on Import data

5 When the import is done, you will see a results screen. Click on the X in the upper right corner to close

Number of records with errors means:
a. You put "No" in the Allow Duplicates field and those users are already in your console, or
b. You listed an assessment type in the Inventory field, but you don't have enough inventory for everyone, or
c. There is something wrong with your data (for example, there are spaces in the email addresses)

Assessment Names must be entered like this:

Behavior Style Self

Teams That Work

Behavior Style 360

Teams That Work+ (**important - only the Team Leader can be imported. The

Behavior Pattern

Team Members must be added individually under the Team tab).