

Export/Import Categories from a CSV File

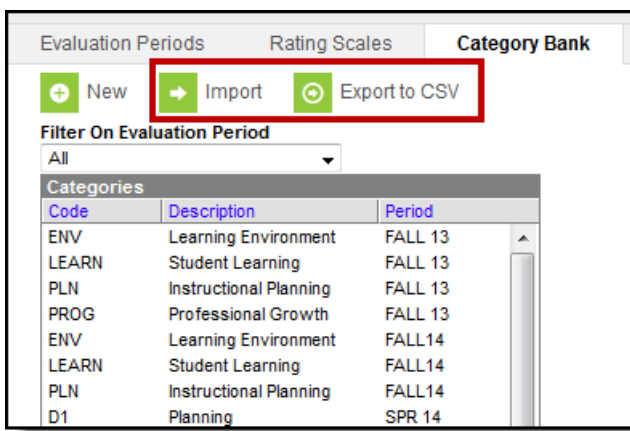
Last Modified on 03/11/2024 8:45 am CDT

[Category Import Template](#) | [Import](#) | [Export](#)

PATH: *Staff Evaluations > Staff Evaluations Setup > Category Bank*

PATH: *Human Resources > Administration > Staff Evaluations Setup > Category Bank (HR-enabled)*

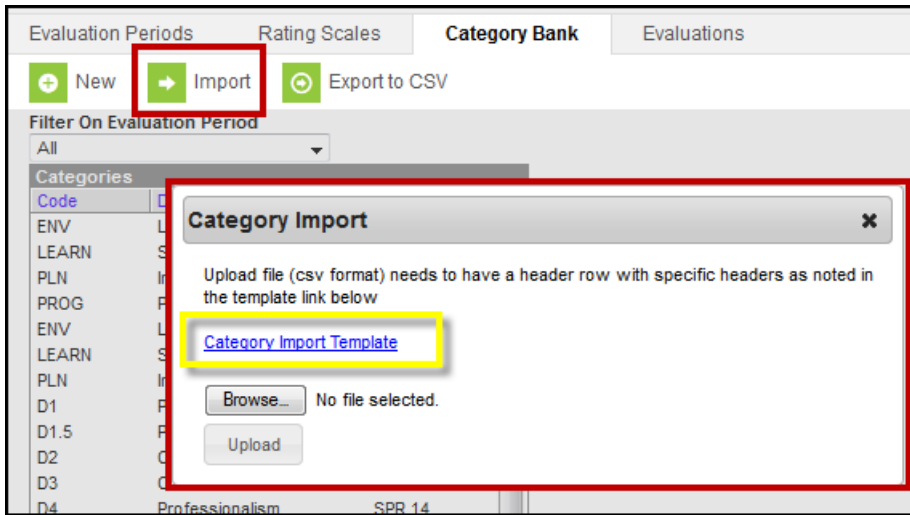
The Category Bank contains the areas of responsibility for which employees are being evaluated. Use the **Import** and the **Export to CSV** buttons to quickly import new category elements.



Import and Export to CSV buttons on the Category Bank tab

Category Import Template

The Category Import Template provides the columns Campus requires for adding a new Category. To download a copy of the template, click the **Import** button then click the **Category Import Template** link. The importTemplate.csv file will open in Microsoft Excel.



Category Import Template Link

The following table provides the column names in the importTemplate.csv file and the Staff Evaluation Category fields they populate.

Use **yes** or **no** (case sensitive) in the import file to indicate whether a checkbox field is marked.

- Enter **yes** for a marked checkbox ().
- Enter **no** for a cleared checkbox ().

This Spreadsheet Column...	Populates this Staff Evaluation Category Screen Field	Max Characters
categoryCode	Code	10
categoryDescription	Description	100
categoryPeriod	Evaluation Period - The characters must match the code for an existing period.	10
observationOnly	Observation Only (checkbox) Use yes or no (case sensitive)	N/A
ratingScaleCode	Rating Scale - The characters must match the code for an existing rating scale.	10
rateAtCategory	Category (checkbox) Use yes or no (case sensitive)	N/A

This Spreadsheet Column...	Populates this Staff Evaluation Category Screen Field	Max Characters
rateAtElement	Element (checkbox) Use yes or no (case sensitive)	N/A
rateAtSubElement	Sub-Element (checkbox) Use yes or no (case sensitive)	N/A
useCheckboxCategory	Use Checkbox (Overrides rating scale) (checkbox) Use yes or no (case sensitive)	N/A
useCheckboxElement	Use Checkbox (Overrides rating scale) (checkbox) Use yes or no (case sensitive)	N/A
useCheckboxSubElement	Use Checkbox (Overrides rating scale) (checkbox) Use yes or no (case sensitive)	N/A
elementCode	This field represents element Codes.	10
elementDescription	This field represents element Descriptions.	100
elementRatingDefinitionCode1	This field represents Rating Scale codes from the associated Rating Scale. The importTemplate.csv provides 5 of these fields.	10
elementRatingDefinition1	This field represents Rating Scale definitions from the associated Rating Scale. The importTemplate.csv provides 5 of these fields. The definition is optional.	800
Sub-Elements		
subElementCode	This field represents Sub-Element Codes.	10
subElementDescription	This field represents Sub-Element Code Descriptions.	100
Sub-Element Rating Scale Definitions		
subElementRatingDefinitionCode1	This field represents Rating Scale codes from the associated Rating Scale. The importTemplate.csv provides 5 of these fields.	10

This Spreadsheet Column...	Populates this Staff Evaluation Category Screen Field	Max Characters
subElementRatingDefinition1	This field represents Rating Scale definitions from the associated Rating Scale. The importTemplate.csv provides 5 of these fields. The definition is optional.	800

Import

PATH: *Staff Evaluations > Staff Evaluations Setup > Category Bank*

PATH: *Human Resources > Administration > Staff Evaluations Setup > Category Bank (HR-enabled)*

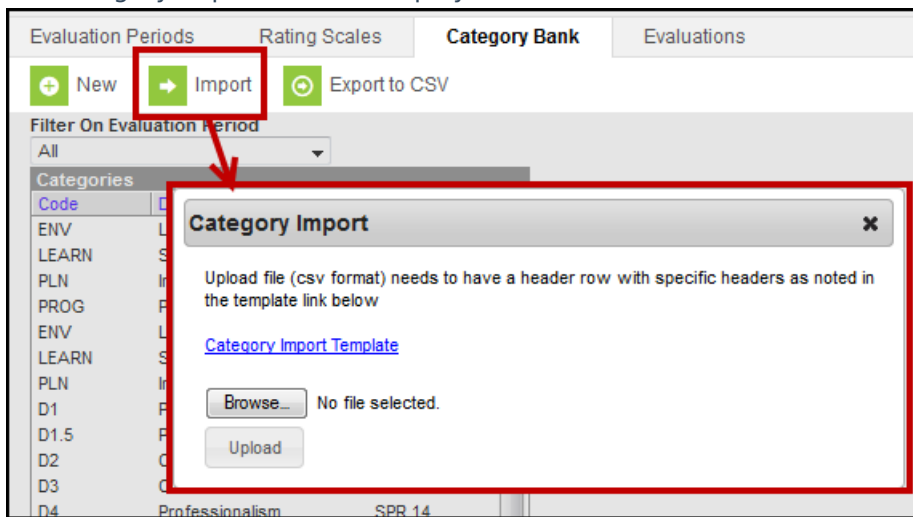
Importing your modified copy of the Category Import Template adds new Categories to the Category Bank.

You cannot import Categories that already exist in the Category Bank AND are already associated with an Evaluation.

1. Click the **Import** button.

Result

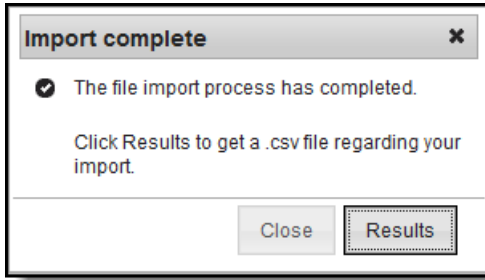
The Category Import window displays.



2. Click the **Browse** button.
3. Select your modified copy of the Category Import Template and click **Open**.
4. Click the **Upload** button.

Result

A confirmation message displays.



- Click the **Results** button to view the importResults.csv file.

The importResults.csv file reports the errors that may have occurred. Use the **result** column to sort the results.

	A	B	C	D	E	F	G
1	result	errors	line	categoryC	elementC	subElementCode	
2	Error	Invalid Period Code. Period Code (SUM 14) not found.	23	ENV	ENV 1.2	ENV 1.2.1	
3	Error	Invalid Period Code. Period Code (SUM 14) not found.	23	ENV	ENV 1.2	ENV 1.2.1	
4	Error	Invalid Period Code. Period Code (SUM 14) not found.	23	ENV	ENV 1.2	ENV 1.2.1	

Export

PATH: *Staff Evaluations > Staff Evaluations Setup > Category Bank*

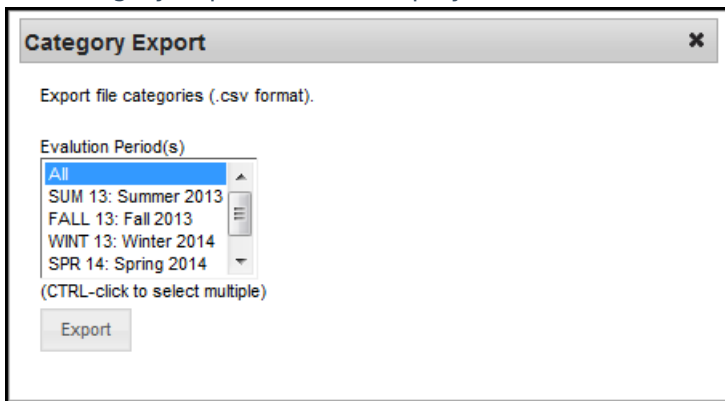
PATH: *Human Resources > Administration > Staff Evaluations Setup > Category Bank (HR-enabled)*

Exporting Categories allows you to easily modify categories with similar names and add them to a new Evaluation Period. When you export categories to a CSV file, you can edit your categories by using Microsoft Excel spreadsheet software then use the [Import](#) process to update them.

- Click the **Export to CSV** button.

Result

The Category Export window displays.



- Select the **Evaluation Periods** you want to export and click the **Export** button.

Result

The file opens in Microsoft Excel spreadsheet software.
