Export/Import Categories from a CSV File

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> **Staff Evaluations will no longer be available after June 30th, 2025. For more information, visit the Human Resources and Staff Evaluation Deprecation FAQ .**

Category Import Template | Import | Export

Tool Search: Category Bank

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.
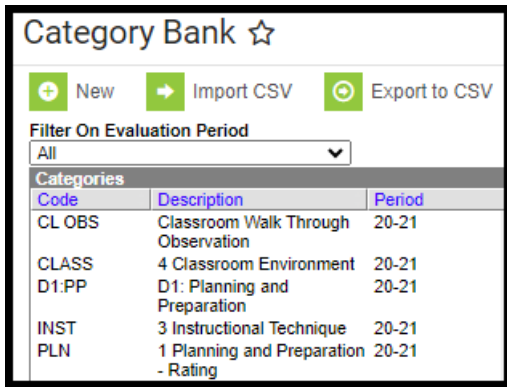
Import and Export to CSV buttons

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.
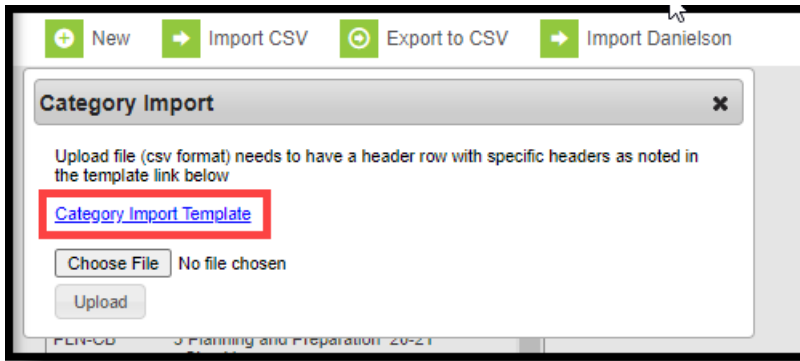
Category Import Template Link

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.

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
rateAtElement	Element (checkbox) Use **yes** or **no** (case sensitive)	N/A
rateAtSubElement	Sub-Element (checkbox) Use **yes** or **no** (case sensitive)	N/A

| This Spreadsheet Column...	Populates this Staff Evaluation Category Screen Field	Max Characters
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
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

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.
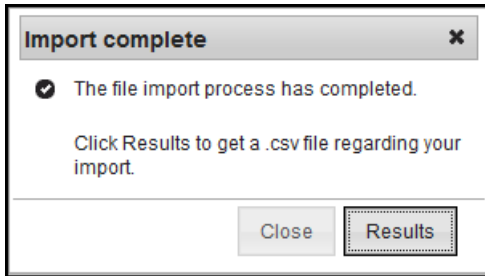
1. Click the **Import CSV** button.
   Result
   The Category Import window displays.
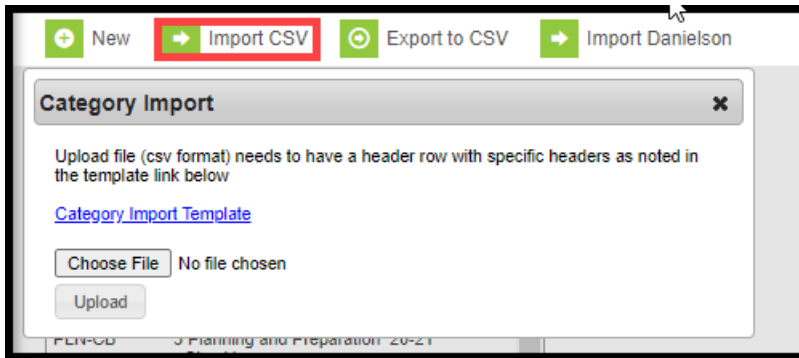
2. Click the **Choose File** button.
3. Select your modified copy of the Category Import Template and click **Open**.
4. Click the **Upload** button.
   Result
   A confirmation message displays.

5. 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.

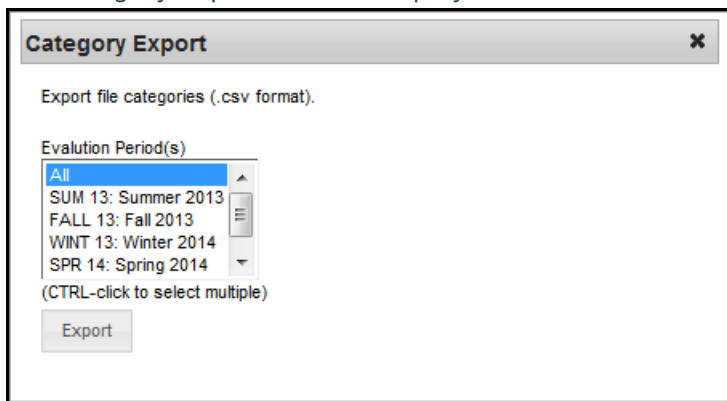|	A	B	C	D	E	F	G
1	result	errors	line	categoryC	elementC	subElementCode	
2	Error	Invalid Period Code. Period Code (SUM 14) not found.	23	ENV	ENV 1.2	ENV 1.2.1	
3	Error	Invalid Period Code. Period Code (SUM 14) not found.	23	ENV	ENV 1.2	ENV 1.2.1	
4	Error	Invalid Period Code. Period Code (SUM 14) not found.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

Export

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.

1. Click the **Export to CSV** button.
   Result
   The Category Export window displays.

   Category Export ✕

   Export file categories (.csv format).

   Evalution Period(s)
   - All
   - SUM 13: Summer 2013
   - FALL 13: Fall 2013
   - WINT 13: Winter 2014
   - SPR 14: Spring 2014
   (CTRL-click to select multiple)

   Export

2. Select the **Evaluation Periods** you want to export and click the **Export** button.
   Result
   The file opens in Microsoft Excel spreadsheet software.