SAVANCE WORKPLACE

Web-Based User Import Guide

For Uploading Users to Savance Workplace

Phone: 248-478-2555
Email: support@savanceworkplace.com
www.savanceworkplace.com

© 2024 | Savance

Last Updated: 11/07/24

Overview

This article outlines the process for uploading users to your Savance Workplace Kiosk in the web-based application. If you have any questions, please contact your Savance Implementation Team and we will be happy to assist you in the upload process.

Web-based Excel Spreadsheet Import

The User Import Wizard allows administrators to add relevant User information from a spreadsheet into Savance Workplace. The spreadsheet needs identifiable headings to match standardized or custom fields. There is a sample import spreadsheet at the end of this article. The spreadsheet must include five pieces of information from each user or staff member: First Name, Last Name, Username, Password, and Email Address.
Notes:

- There is a limit of 250 users per import, so if you have more, please use multiple sheets to import them.
- If you have multiple organizations, non-master admins will have to import users through the desktop application so that they can select their organization for the import:
  https://www.savanceworkplace.com/knowledge-base/getting-started-with-the-user-import-wizard-through-the-desktop-application/

Staff Import

Required Fields

1. **UserName** – The username is only important for the staff who plan to log into the Savance Workplace web portal to run reports, manage users, or manage the organization settings. It should be a full email address or something globally unique. For example, *TSmith* is not a valid username since we require **eight characters** by default. *JohnSmith* is a bad username, too, since it's not likely to be globally unique. This is the unique identifier for the account. If an account already exists for a username, it will attempt to update that account instead of creating a new one. Note: by default, the Username is actually required to be the Email, but you can disable this in the Global Settings under "Credential Settings".
2. **First Name, Last Name** – First and Last Name of the User

3. **Password** – Supplied to any user with a valid username to log into the Savance Workplace web portal for the same purposes. A default password is required to be set with the import only for Staff
4. **Email Address** – Used by Savance Workplace to reset the password of any staff member. If you don't want a unique/usable email for every user, this can be a generic email address within the organization or an undeliverable address to be decided later, i.e. "none@none.com"

Optional Fields

1. **UserID** – UserID or Badge imprint for identifying staff members at the kiosk badge readers. It's just enough information to be unique to anyone within an organization. We cannot assign more than one Badge number to a staff member. An access control system integration would allow us to associate many badges with one staff member.
2. **UserPIN** – MFA for the kiosk. If enabled, one supplies the User's PIN after scanning a badge to authenticate.
3. **Any Contact Field** – Any Default or Custom Contact Field can also be added as a column for Import

Other Import Settings/Notes

1. Set Status on Import: During import set status to Out –
   It's best to import to the Out status. As people leave for the day or we sign everyone Out at midnight, it makes the most sense to start there too. Until they screen, they remain in the Out status.
   To "Sign Out all users at midnight," see the Administrator panel > Global Settings > "Sign Out All Users at Midnight"
2. The Savance Workplace web portal allows a maximum of 250 users per import file.
3. Verify you do *not* have any empty columns between imported columns. Delete empty columns or move any isolated columns of data to reduce the chance of errors during the import process. The first empty sheet column signals the end of the spreadsheet. We can ignore columns of information after the next step.
   - Note: Empty Rows are allowed.
   - XLS file types and special characters are not supported.

Visitor Import

Required Fields

The spreadsheet must include two pieces of information from each visitor or patient: First Name and Last Name. You may then add any additional information you wish to import in and have as fields in Savance Workplace as further columns.

Optional Fields

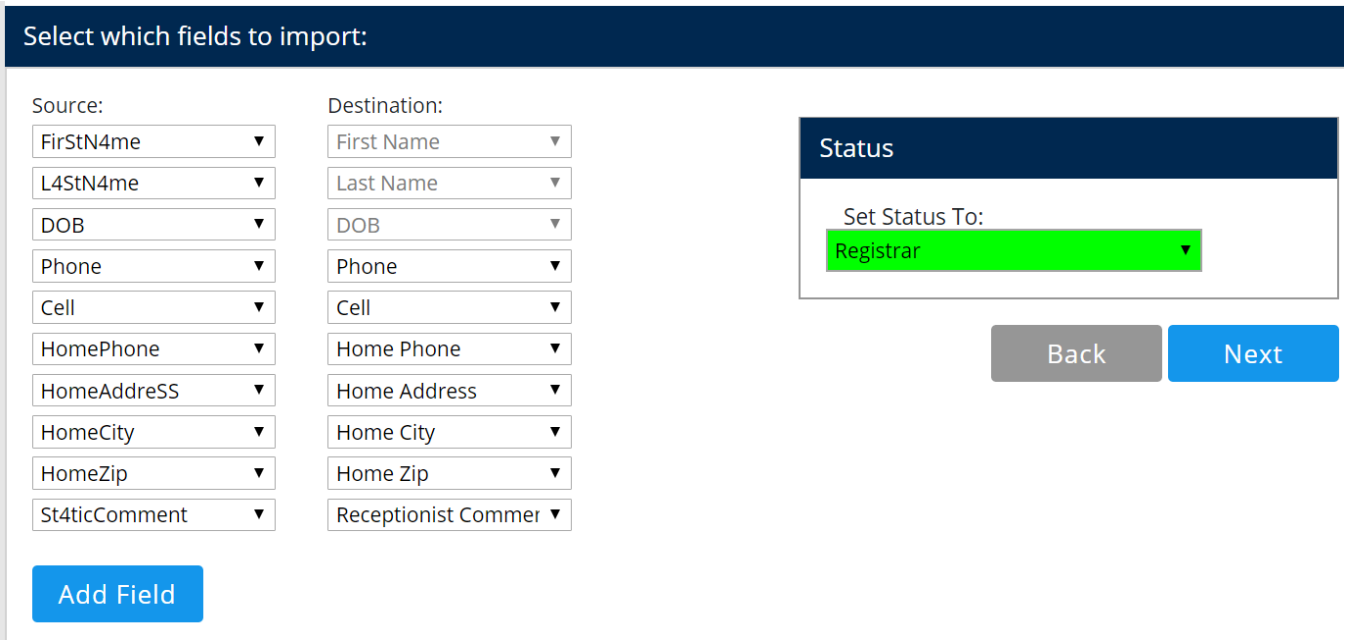
1. **Preregistered** – Adds the Visitors as Preregistered. Note that the Preregistered Start and End Date currently need to be in UTC on the import spreadsheet.
2. **AlwaysAddNew** – Always adds the Visitor as a new visitor instead of updating an existing visitor if there is a matching one.

How to Import with an Excel Spreadsheet

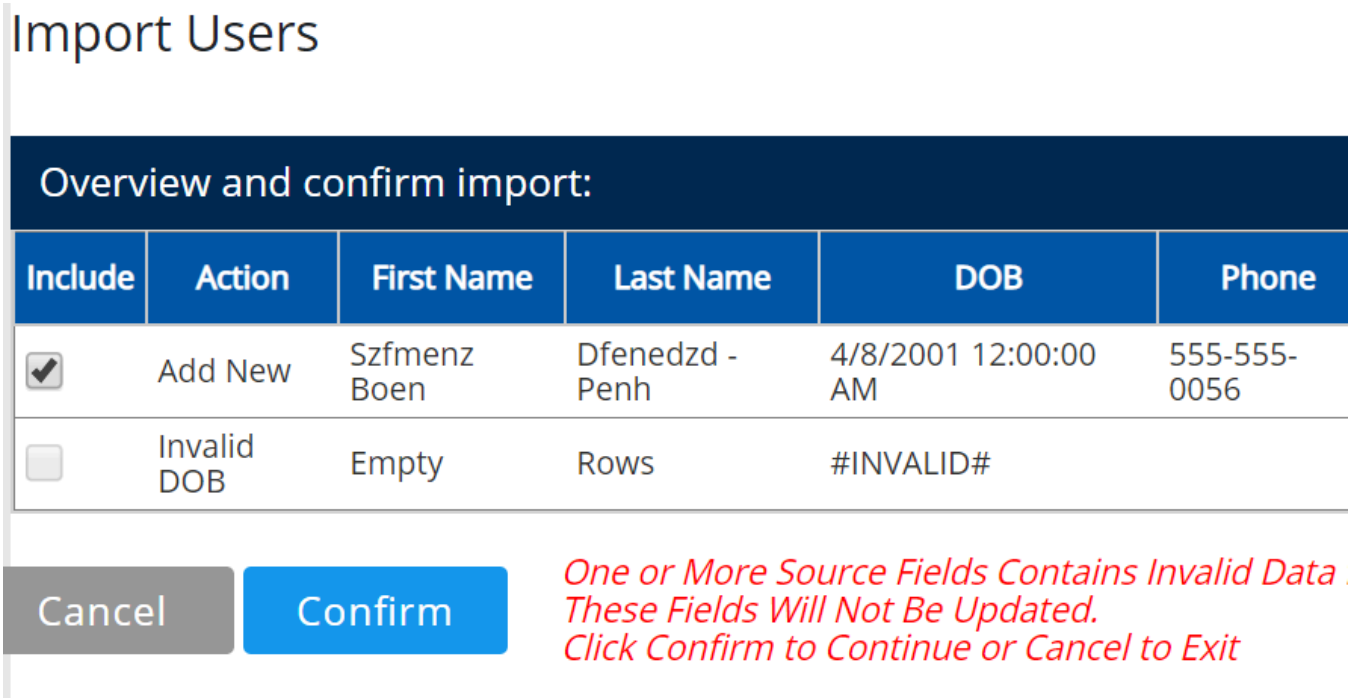
You will find our User Import Wizard under the Admin gear.
The 'Users, Groups, and Security' section manages new and existing users.
Select 'Import Users' under 'Manage Company Users' on the Users page.

'Upload an Excel file for User Import' uploads the prepared spreadsheet from your computer. Click 'Upload.' Here you can also choose whether you are doing a User Import of Staff, Visitors, or Watchlist names.

Your prepared Excel sheet requires only those four pieces of information from each Staff user, or just First Name and Last Name if importing visitors.



On the left, we see a list of Source columns representing the Column Headers on your Import Spreadsheet. Those Column headers are arbitrary identifiers user-defined or exported from another application. On the right, the Destination Column represents the Savance Workplace field name for each column. Savance Workplace is highly customizable - any field you want to create, we can import data to it. We have the flexibility to match any column to another column under the category of “Contact Fields.”



After matching the columns in the import process, this template is stored for the next import. On the far right, decide on a first Status for the imported users within Savance Workplace. This could be any custom status to organize users on their way into your system. Click Next to confirm these are the fields you intend to import.

'Overview and confirm import' shows the action performed on each row and the option to ignore additional rows. The example below shows an error because the entry holds an invalid entry for the DOB field. The error message reads: *One or More Source Fields Contains Invalid Data for The Chosen Destination Field. These Fields Will Not Be Updated. Click Confirm to Continue or Cancel to Exit*

Click 'Confirm' to see the 'Import Results' showing the quantifiable results of the import such as Added, Updated, Ignored, Errors, and Total. This concludes the User Import Wizard.

The option to click 'Return' takes you back to the Users section of the Administrator options.

Now, you can view all of your users on the standard view under the designated status. You will notice that each User has a Status Comment attached for your records "Status set by Import." You can clear this comment while you change the user's status.

Additional Resources

Savance-Hosted Web Getting Started Guide

Sample Excel Import Sheet:
https://downloads.savanceworkplace.com/SavanceWorkplaceUserImport.xlsx

Support: How to Access Support