Mass Uploading Employee Documents

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Summary

The mass upload documents process is broken down into two steps: creating the metadata file and uploading the documents and metadata file into the solution. To begin the mass document upload process, access the *Employee Documents* report and select *Mass Upload* (it may appear within the ellipses).

The upload process has <u>two</u> steps.

Create a metadata file that maps the documents to the appropriate employee accounts.

1. From the Mass upload documents action button, select Download template to save the CSV file.

2. Complete the template with the required data for each file being uploaded to map the documents to the employees' accounts.

3. The template has five available columns.

Account ID	Required. This is **NOT** the Employee ID field. You must add the *Account ID* column to a report in order to export this value for each employee. The *Account ID* is the only way the system knows which employee to map each document to. ![table showing Account Id, Employee Id, First Name, Last Name columns with values 4336867437, 40008, Buddy, Budtender]()
Document Type ID	Required, if Globally Required at the Company level. Document IDs are unique per company and can be found by going to Settings > Global Setup > Global List Definitions > Document Types. Example Document IDs are shown below. ![table showing Document Type and Document Type Id: Admin ONLY 184720766, Benefit Plan Document 369236610, Dr/Medical Note 369236609]()
Filename & Extension	Required. This field is the file name and extension that will be mapped to the specified Account ID.
Display Name	This is the display name of the file. This is not a required field, although it is commonly used.
Description	An optional field, this allows for a description to be added.

Important: Ensure the created template file is named 'metadata' for the upload process to be completed successfully.

Upload the documents and the completed metadata file into the solution.

1. **These files <u>must be added together</u> in a zip folder** and then loaded together for the mapping to occur.

2. Once the upload has been completed, a CSV file is created and can be downloaded to review the success of each upload. This allows you to review the file, status, and reasons to help with troubleshooting and verification.

Important: When doing large mass uploads, you may navigate away from the upload process as it completes. You will receive an alert letting you know when it has been completed and provide the link to download the CSV results.

Process

Access the Employee Documents report and select mass upload to initiate the mass upload document process.

1. Navigation : *HR > HR Maintenance > Employee Documents*

2. Select the Mass Upload button.
   - **Note:** The Mass Upload button may be located under the ellipsis icon.

3. Select *Download Template*.

4. Enter the required account and document data, as appropriate.
   - **Important:** Account ID (**this is <u>NOT</u> the Employee ID**), Filename and Extension **are always required**, while Document Type ID is only required when this is configured at the company level.

5. Save the file with the name *'metadata'*.

6. Save the document files <u>**and**</u> the metadata file <u>**in a single zip file**</u>.

7. In the solution on the Mass Upload screen, select Choose Zip File and select the created zip file.

8. Select Upload.
   - **Important:** Do not close or refresh your browser while the upload is in progress.

Review Mass Upload Results

Upon completing a mass document upload, the results can be accessed and viewed from the resulting CSV file.

Your file was successfully uploaded

Your documents are now available on the Employee Documents report and are reflected as "Bulk Upload" in the Related column.

(Close)   (New mass upload)   (**Download CSV**)

Important: Even though the file shows "successfully uploaded", individual file uploads may have failed. **Always download and review the CSV file to confirm the status of all documents uploaded.**

	A	B	C	D
1	File Name	Account Id	Status	Reason
2	B.Budtender-Resume	4336867437	Failure	File Not Found
3	C.Cashier-Resume	4336867437	Success	C.Cashier-Resume.pdf has been uploaded successfully.

Tutorial

Your browser does not support HTML5 video.