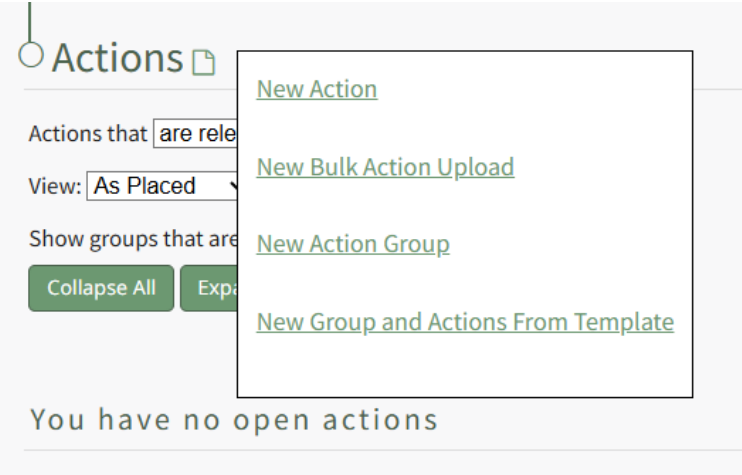


Import Bulk Actions

To import new actions in bulk using a CSV file, go to the Actions Module Home Page and hover your cursor over the page icon opening the home page context menu.



Click “New Bulk Action Upload” opening the Import Actions Page.

Clicking the “Download Template” clickable link will automatically download a CSV file to your personal device, with the fields to be filled in for each action, designated by the column headers. The table below explains each of the field inputs.

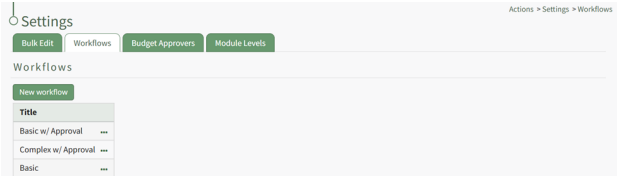
Import Actions Template Field Explanations	
Field	Explanation
Group	If importing actions from the Actions Home Page, input the Title of the Action Group this action should be associated with. If importing actions from within a group (by clicking on the group name), this cell can be left blank because the actions will automatically be added to the group you're uploading to.
Group Date	The action group date is flexible and can be utilized by your organization as best fit. When action groups are duplicated or created from a template, the action group date can be used as the distinguishing feature.

Action Number	Action Numbers are used to differentiate each task in a chronological order. Actions within the same Action Group cannot have the same Action Number. You can leave the field blank. You can also input text if you wish to use the alphabet as way to categorize actions.
Title	Input the title of the action.
Description	Input the description for the action.
Source	The Source field is intended to serve as an input for the source of the action. Source is a free text field, allowing you to input any desired response. Customer, Internal Request, a user's name, role or department are all examples of potential Source field categories.
Due Date	Input the date the action must be completed by. Action Group Templates allow additional control regarding due dates in the Relative Due Dates section when creating or editing a template.

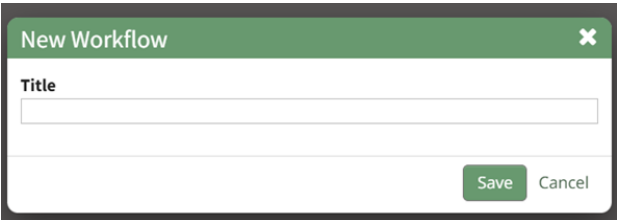
Select a default workflow (basic, basic with approval, complex) or a customized workflow specific to your organization.

How To: Create New Workflow

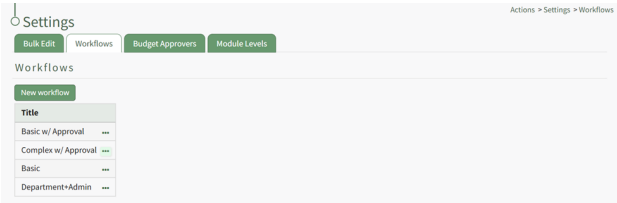
To create a new workflow, select Settings under the Action Module on the Main Menu. Open the Workflows tab.



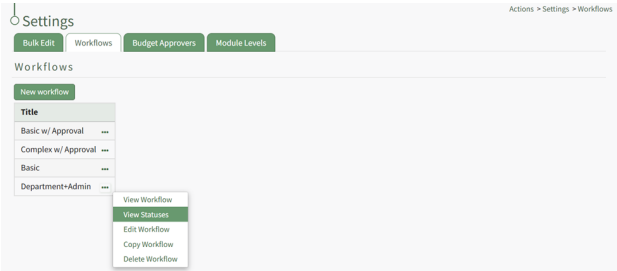
Click the “New Workflow” button opening the New Workflow Title Modal.



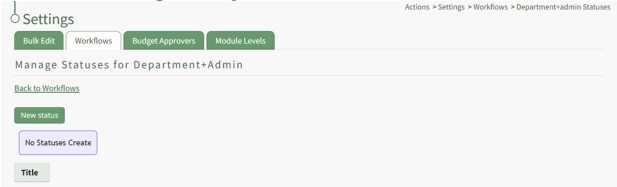
Input the title of the new workflow and select the “Save” button.



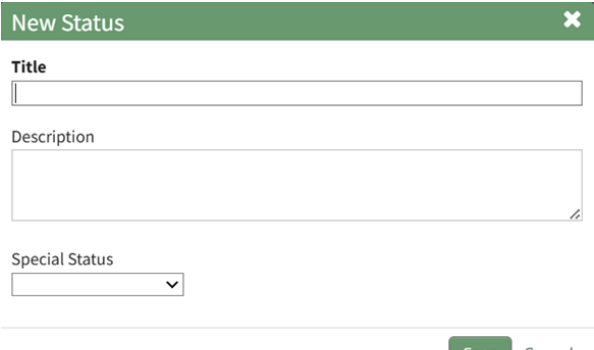
The new workflow is now visible in the Workflow Title Table. Click the three dot icon to the right of the new workflow opening the Workflow Context Menu.



Select “View Statuses” opening the Manage Statuses Page for your workflow.



Click the “New Status” button opening the New Status Modal.



Status	The status of the action is based on the workflow selected. Basic: Open, Closed Basic with Approval: Open, Pending Approval, Completed Complex with Approval: Open, Scheduled, In Progress, Pending Approval, Completed, Cancelled Actions can be imported with any status and not just the first status of the workflow.
Date Complete	This field should be blank unless the task is already complete. If the action is already completed, include the completion date here.
Warn (Days)	Input a numerical value for the number of days ahead of the due date you want users to get a system email alert reminder of the outstanding action (converting from blue to yellow status).
Assigned To	Input the users (by username or First and Last Name) that you want to assign the action to. Actions cannot be assigned to roles or access levels. An Action can be assigned to multiple people. Use a semicolon to separate individuals assigned to an action.
Action Approvers	Input the users (by username or First and Last Name) that can approve an action. Action Approvers cannot be assigned to roles or access levels. Multiple users can be designated as an action approver. Use a semicolon to separate individuals assigned to an action.
Interested Parties	Input the users (by username or First and Last Name) or Certification Roles that are identified as Interested Parties. Multiple users or roles can be designated as an Identified Party. Use a semicolon to separate users/roles.
Action Response	The information input into the Action Response field will add a comment to the action task when imported, prefaced with "The following response was imported."

Before importing your bulk actions, save the file as a UTF 8.

Import Actions

Actions > Import Actions

[Download template](#)

Assigned To, Action Parties and Action Approvers are semi-colon separated usernames or full names, e.g. "jdoe;Fred Flintstone". If not found, they are not added, however a comment is added with details

Choose Files

No file chosen

Next Step >

Select the "Choose Files" button and select the saved UTF 8 CSV file to be imported.

Click the “Next Step >” button and confirm that your column headers match the new action form fields and complete the import.

Revision #6

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