

# Export/Import Categories from a CSV File

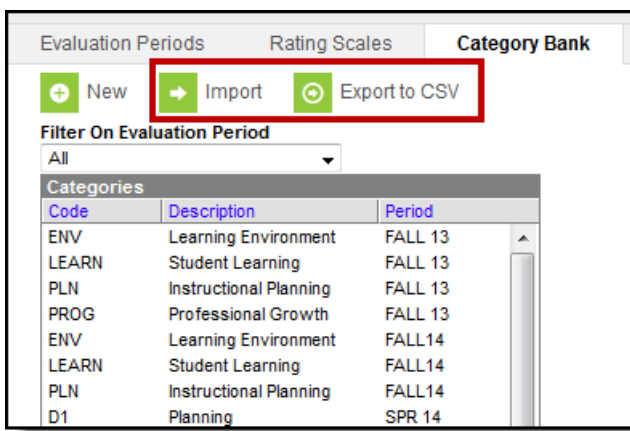
Last Modified on 10/22/2022 10:11 am CDT

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

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

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

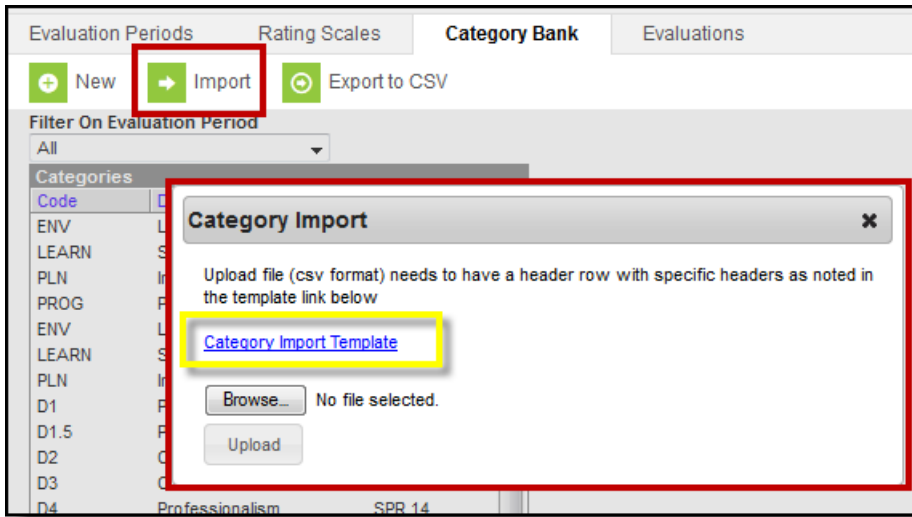
The Category Bank contains the areas of responsibility for which employees are being evaluated. Use the **Import** and the **Export to CSV** buttons to quickly import new category elements.



*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
<b>categoryCode</b>	Code	10
<b>categoryDescription</b>	Description	100
<b>categoryPeriod</b>	Evaluation Period - The characters must match the code for an existing period.	10
<b>observationOnly</b>	Observation Only (checkbox) Use <b>yes</b> or <b>no</b> (case sensitive)	N/A
<b>ratingScaleCode</b>	Rating Scale - The characters must match the code for an existing rating scale.	10
<b>rateAtCategory</b>	Category (checkbox) Use <b>yes</b> or <b>no</b> (case sensitive)	N/A
<b>rateAtElement</b>	Element (checkbox) Use <b>yes</b> or <b>no</b> (case sensitive)	N/A

This Spreadsheet Column...	Populates this Staff Evaluation Category Screen Field	Max Characters
<b>rateAtSubElement</b>	Sub-Element (checkbox) Use <b>yes</b> or <b>no</b> (case sensitive)	N/A
<b>useCheckboxCategory</b>	Use Checkbox (Overrides rating scale) (checkbox) Use <b>yes</b> or <b>no</b> (case sensitive)	N/A
<b>useCheckboxElement</b>	Use Checkbox (Overrides rating scale) (checkbox) Use <b>yes</b> or <b>no</b> (case sensitive)	N/A
<b>useCheckboxSubElement</b>	Use Checkbox (Overrides rating scale) (checkbox) Use <b>yes</b> or <b>no</b> (case sensitive)	N/A
<b>elementCode</b>	This field represents element Codes.	10
<b>elementDescription</b>	This field represents element Descriptions.	100
<b>elementRatingDefinitionCode1</b>	This field represents Rating Scale codes from the associated Rating Scale. The importTemplate.csv provides 5 of these fields.	10
<b>elementRatingDefinition1</b>	This field represents Rating Scale definitions from the associated Rating Scale. The importTemplate.csv provides 5 of these fields. The definition is optional.	800
<b>Sub-Elements</b>		
<b>subElementCode</b>	This field represents Sub-Element Codes.	10
<b>subElementDescription</b>	This field represents Sub-Element Code Descriptions.	100
<b>Sub-Element Rating Scale Definitions</b>		
<b>subElementRatingDefinitionCode1</b>	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
<b>subElementRatingDefinition1</b>	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)*

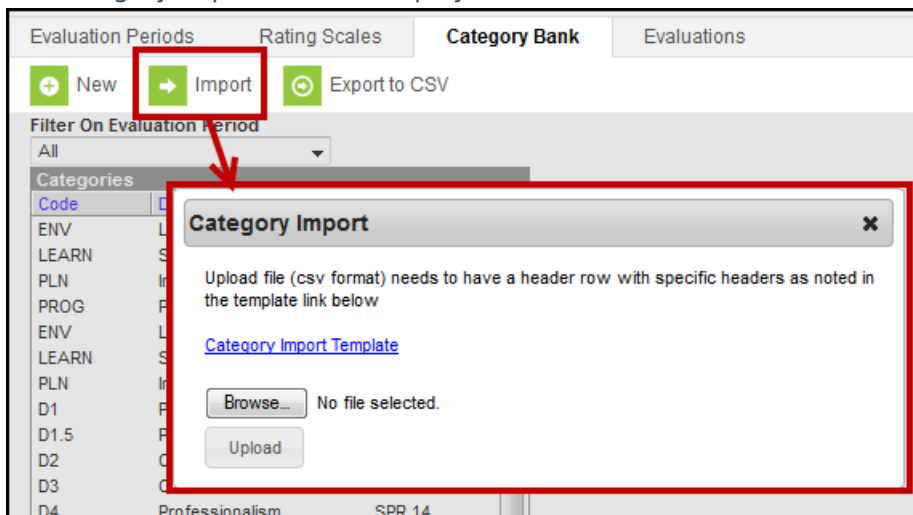
Importing your modified copy of the Category Import Template adds new Categories to the Category Bank.

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

1. Click the **Import** button.

**Result**

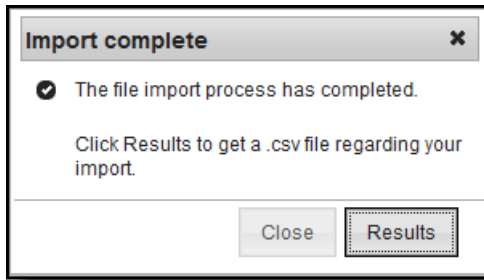
The Category Import window displays.



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.



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

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

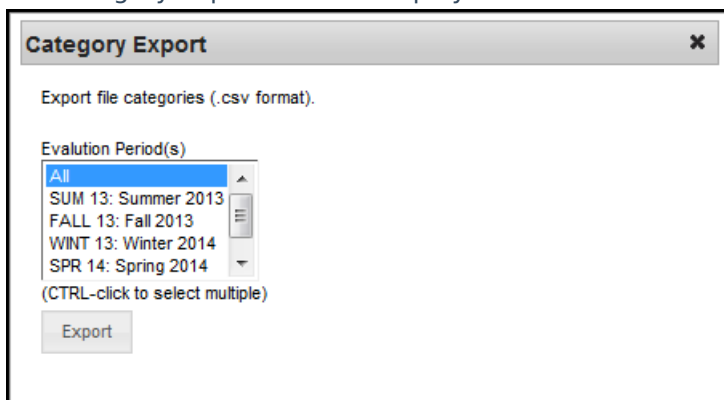
**PATH:** *Human Resources > Administration > Staff Evaluations Setup > Category Bank (HR-enabled)*

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.

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

### Result

The Category Export window displays.



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

## **Result**

The file opens in Microsoft Excel spreadsheet software.

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