



Appendix 7 – Member Import and Export

For staff with LKS Administrator permissions

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1. Member Import

What is the Member Import?

The Import Members function allows member data to be imported into KnowledgeShare to create Member records.

You must ask the KnowledgeShare team to turn on this function for you.

The member data must be structured in a specific order in a CSV file to be imported into KnowledgeShare.

1.1 Import CSV file

The member data must be structured in a specific order in a CSV file to be imported into KnowledgeShare.

The column order is:

OpenAthens Username [leave blank]

OpenAthensPUIID [leave blank]

Title

First Name [mandatory]

Surname [mandatory]

Preferred Name

Phone

Email [mandatory]

Email 2

Job Title [mandatory]

Organisation [mandatory]

Department [mandatory]

Job Group [mandatory]

Job Role [mandatory]

Primary Location [mandatory]

Address Line 1

Address Line 2

LKS Membership Number [mandatory]

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Leave Blank	Leave Blank	Title	First Name	Surname	Preferred Name	Phone	Email	Email 2	Job Title	Organisation [Restricted]	Department [Semi-Restricted]	Job Group [Restricted]	Job Role [Restricted]	Primary Location [Semi-Restricted]	Office / Ward	Building	LKS Membership Number
2			Mr	Ben	Skinner		01273 52331	ben.skinner@nhs.net		Head of Libraries, Knowledge Brighton and Sussex University Library and Knowledge Administrative an A&C: Library Staff					Royal Sussex County Hospital		Audrey Emery	58R009263
3																		
4																		
5																		
6																		
7																		
8																		

Pink colour indicates mandatory field

[Restricted] indicates that values must align to organisational / job group taxonomies in KnowledgeShare

1.2 Checking Import CSV file

Check for any spelling mistakes and correct.

Health Care Assistnat	U
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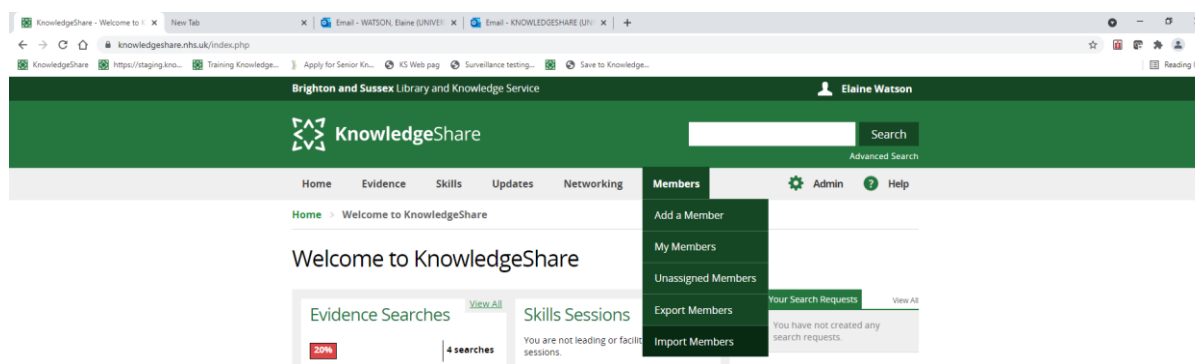
Ensure the Job Title, Organisation, Department text has each word in phrase capitalized.

Clerical Assistant	U
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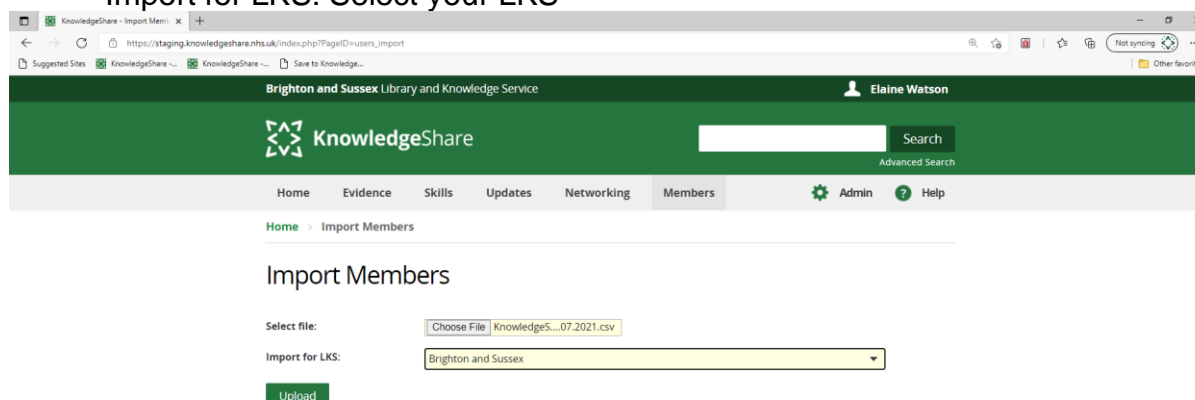
Check Organisations, Departments and Locations are consistent with existing values.

1.3 Upload CSV file to KnowledgeShare

Click on Members>Import Members



On the Import Members page:
Select file: browse for CSV file
Import for LKS: Select your LKS



Click on Upload



A total of 9 user(s) have been added to the system.

1.4 Error messages

- This Member is already on the system based on the Email

Check the member is assigned to your library service. Due to @nhs.net emails moving with staff from trust to trust, this member may be assigned to another library service and will need to be transferred to your LKS.

The member may be unassigned. If so, assign to your library service.

If the member is already at your library service, check the details on the spreadsheet against the record and ensure the most up to date information is on KnowledgeShare.

- This Member is already on the system based on the User ID

The User ID means KS has found the members LKS Membership Number on the system.

It can still be worth checking the record in KS to ensure the most up to date information on the member, such as email, is on the KS record.

- Email is invalid

This error message means the email address is not in the standard email format. This is often due to missing @ symbols or other typos. Check and correct the member's record.

- Invalid Job Role: ACS Rehabilitation Assistant

Check the Role matches the list in KnowledgeShare. See Appendix 3 – Job Group and Job Role. Check for any spelling errors or typos that mean the role does not match the list.

- Department is missing

Check the Department field on the spreadsheet. This error message indicates the field is empty and needs to be populated.

- Initialisation Error

Fatal error: Missing argument \$Label Value in call to LookupTable::GetBy Lable() in ~/`project_code/modules/LookupTables/classLookupTable.php` on line

Initialisation Error

An error has occurred which stopped the application from loading.

Please try back later. If the problem persists, please contact the system administrator.

When you contact the system administrator, please copy and paste the following information which will help them resolve the problem more quickly:

Fatal error: Missing argument \$LabelValue in call to LookupTable::GetByLabel() in `~/project_code/modules/LookupTables/classLookupTable.php` on line 338

Check the column order is:

OpenAthens Username

OpenAthensPUID

Title

First Name

Surname

Preferred Name

Phone

Email

Email 2

Job Title

Organisation

Department

Job Group

Job Role

Primary Location

Address Line 1

Address Line 2

LKS Membership Number

1.5 Check Locations and Departments in KnowledgeShare

Go to the Organisation Edit page of the organisation that members have been added to.

Check that no new locations or departments have been added to the “Unknown” Division and Geographic Locations

Unknown **[Move]**

Quality Improvement Team **[Move]**

Radiological Sciences **[Move]**

Add New Department

[Add New Site](#)

[Unknown](#) [\[Move\]](#)

| [Royal Alexandra Hospital](#) [\[Move\]](#)

[Add New Site](#)

1.6 Ensure 'Unknown' Locations and Departments are empty

New Locations and Departments created from the Add member page and the Member Upload are added to 'Unknown' Division and Geographic Locations

To ensure these 'Unknown' Division and Geographic Locations can be easily checked after an upload and any errors corrected, they should be regularly checked and managed.

For departments, they should be checked for:

- Formatting standards errors
- Typos and spelling mistakes
- Duplicates
- Lone acronyms
- Wards

For locations, they should be checked for:

- Formatting standards errors
- Typos and spelling mistakes
- Duplicates

1.6.1 Actions for 'Unknown' department

Check for and correct:

- Formatting standards
 - Start a department with a capital letter i.e. 'Paediatrics' not 'paediatrics'
 - It is not necessary to add the term "Department" to this field
- Typos and spelling mistakes
 - Edit and correct any typos or spelling mistakes
- Duplicates
 - Remove duplicate department names by moving all the members to one of the departments

[care of the Elderly](#)
[Care of the Elderly](#)
[cellular Pathology -Histology](#)
...

- Edit the name of the department you intend to delete and add a number to make it distinctive

Capel Ward [Move]
care of the Elderly1 [Move]
Care of the Elderly [Move]
cellular Pathology -Histology [Move]

- Click on each of the members under the department you intend to delete, and change their department to the correct one

Department

care of the Elderly

care of the Elderly1

Care of the Elderly

- When there are no members under the duplicate department name it can be deleted

Edit Department

Name

care of the Elderly1

Save Cancel Delete

Members in this department

- Lone acronyms
 - Avoid just acronyms, add the name in full with the acronym in brackets at the end of name i.e. 'Coronary Care Unit (CCU)' not 'CCU'
- Wards
 - Avoid adding Wards, add the medical speciality of the ward instead

cellular Pathology -Histology
chaldon Ward
Chaldon Ward
Charlwood Ward

- Find the medical speciality of the ward

East Entrance			
Charlwood	Surgical	Ground floor, East Entrance	01737 284 612
Chaldon	Surgical	First floor	01737 284 614

- Click on each of the members under the ward and change their department to the speciality

Department

Surger|

- Dental and Maxillofacial Surgery
- Paediatric Surgery
- General surgery
- General Surgery
- Lower GI surgery
- Surgery
- Surgery Centre

- The ward can be added to Address Line 1

Address

Address Line 1

Charlwood Ward

- When there are no members under the ward department name it can be deleted

Edit Department

Name

Charlwood Ward

Save Cancel Delete

Members in this department

Once departments in the 'Unknown' division have been checked and any corrections made they can then be moved to the appropriate division.

1.6.2 Move departments

Only LKS Administrators can move department as only this role can see the [Move] link in red text after the department name.

To move a department to a different division within an Organisation

- Click on **[Move]** next to the department you want to move

- [Unknown](#) **[Move]**
- [Adult Community Healthcare Team](#) **[Move]**
 - [Assessment & Observation Unit](#) **[Move]**
 - [Biochemistry](#) **[Move]**
 - [Cardiology](#) **[Move]**
 - [Children's Community Nursing Team](#) **[Move]**
 - [Children's Day Unit](#) **[Move]**
 - [Childrens Outpatients](#) **[Move]**
 - [Community](#) **[Move]**
 - [Community Head Injury Service](#) **[Move]**
 - [Corporate](#) **[Move]**
 - [Day Surgery](#) **[Move]**
 - [Dietetics](#) **[Move]**
 - [Echocardiography](#) **[Move]**

- From the 'Organisation to move to:' drop down list select the organisation of the department

Home > Moving Organisation Structure Item

Moving Organisation Structure Item

Please select where you want to move the item **Department Anaesthetics**

Organisation to move to:

Division to move to:

Save Cancel

- Select the division to move the department to from the 'Division to move to:' drop down list

Home > Moving Organisation Structure Item

Moving Organisation Structure Item

Please select where you want to move the item **Department Anaesthetics**

Organisation to move to: Pickwick Health NHS Trust

Division to move to:

There are 2 members assigned to this organisation is not changed so the change won't affect them.

ABDOMINAL SURGERY AND MEDICINE
ACUTE MEDICINE
CHILDREN'S SERVICES
CORPORATE SERVICES

Save Cancel

- Click **Save**

Moving Organisation Structure Item

Please select where you want to move the item **Department Anaesthetics**

Organisation to move to: Pickwick Health NHS Trust

Division to move to: URGERY AND MEDICINE

There are 2 members assigned to the item you want to move but Organisation is not changed so the change won't affect them.

Save Cancel

- The department will now be under the selected division

Divisions

ABDOMINAL SURGERY AND MEDICINE [\[Move\]](#)

| [Anaesthetics](#) [\[Move\]](#)

[Add New Department](#)

1.6.3 Actions for 'Unknown' locations

Check for and correct:

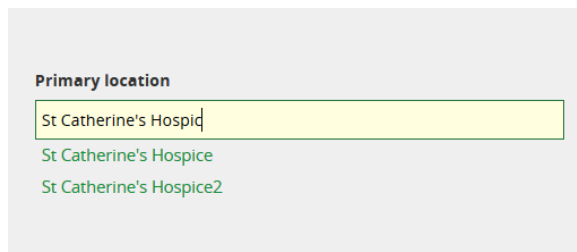
- Formatting standards
 - Start a location with a capital letter i.e. 'Royal Sussex Hospital' not 'royal sussex hospital'
- Typos and spelling mistakes
 - Edit and correct any typos or spelling mistakes
- Duplicates
 - Remove duplicate locations names by moving all the members to one of the locations

[Smallfields Surgery](#) [\[Move\]](#)
[St Catherine's Hospice](#) [\[Move\]](#)
[St Catherine's Hospice](#) [\[Move\]](#)

- Edit the name of the location you intend to delete and add a number to make it distinctive

[Smallfields Surgery](#) [\[Move\]](#)
[St Catherine's Hospice](#) [\[Move\]](#)
[St Catherine's Hospice2](#) [\[Move\]](#)

- Click on each of the members under the department you intend to delete, and change their department to the correct one



Primary location

St Catherine's Hospice

St Catherine's Hospice2

- When there are no members under the duplicate department name it can be deleted

Edit Site

Name	St Catherine's Hospice2
Address	
Town/City	
County	
PostCode	

Save Cancel Delete

Members in this site

Once departments in the 'Unknown' location have been checked and any corrections made they can then be moved to the appropriate geographic locations.

1.6.4 Move locations

Only the Named LKS Administrator can move locations as only this role can see the [Move] link in red text after the location name

To move a location to a different Geographic Location within an Organisation

- Click on **Move** next to the location you want to move

Unknown **[Move]**

Caterham Dene Hospital **[Move]**
East Surrey college **[Move]**
East Surrey Hospital **[Move]**
Farmfield Hospital **[Move]**
Forum House **[Move]**
Ifield Medical Practice **[Move]**
New Park House **[Move]**
Oxted therapies unit **[Move]**
Princess Royal Hospital **[Move]**
Royal Surrey Hospital **[Move]**
Smallfields Surgery **[Move]**

- Select the organisation of the location from the 'Organisation to move to:' drop down list

[Home](#) > Moving Organisation Structure Item

Moving Organisation Structure Item

Please select where you want to move the item **Organisation Site Wilkie Collins House**

Organisation to move to:

Pickwick Community Healthcare NHS Trust

Pickwick Health NHS Trust

Geographic location to move to:

[Save](#) [Cancel](#)

- Select the geographic location to move the department to from the 'Geographic location to move to:' drop down list

[Home](#) > Moving Organisation Structure Item

Moving Organisation Structure Item

Please select where you want to move the item **Organisation Site Wilkie Collins House**

Organisation to move to:

Pickwick Health NHS Trust

Geographic location to move to:

Unknown

WESSEX

There is 1 member assigned to the item you want to move but Organisation is not changed so the change won't affect them.

[Save](#) [Cancel](#)

- Click **Save**

Moving Organisation Structure Item

Please select where you want to move the item **Organisation Site Wilkie Collins House**

Organisation to move to: Pickwick Health NHS Trust

Geographic location to move to:

WESSEX

There is 1 member assigned to the item you want to move but Organisation is not changed so the change won't affect them.

Save

Cancel

- The location will now be under the selected geographic location

Geographic Locations

Unknown **[Move]**

[Add New Site](#)

WESSEX **[Move]**

[Bleak House](#) **[Move]**

[Charles Dickens Hospital](#) **[Move]**

[Dotheboys Hall](#) **[Move]**

[Tellsons Bank Hospital](#) **[Move]**

[Wilkie Collins House](#) **[Move]**

[Add New Site](#)

[Add New Geographic Location](#)

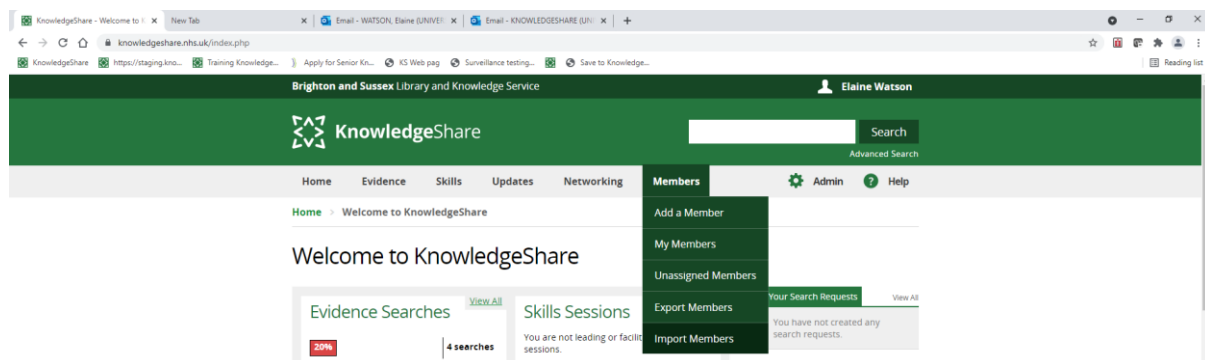
2. Member Export

What is the member export?

The Export Members function allows you to export a list of all your LKS members as a CSV file.

2.1 Export CSV file

Click on Members>Export Members



On the Export Members page:
Export Format : select CSV
User type: select Members
Export from LKS: Select your LKS

Users export

Export format: CSV

User type: Members

Export from LKS: Sussex Health

Export

Click on Export.

2.2 Exported data

The following columns are included in the exported CSV file:

OpenAthens PUID
Username
Title
First Name
Surname
Preferred Name
Phone

Email
Email 2
Job Title
Organisation
Department
Job Group
Job Role
Primary Location
Address Line 1
Address Line 2
LKS Membership Number