

ENHANCED USER HEAD OF DEPARTMENT UPLOAD PROCESS

RESEARCH GOVERNANCE OFFICE

Enhanced User Head of Department (HOD) Upload

Pre-Nominated Enhanced Users from research offices can upload their Head of Department (HOD) changes directly into REGIS. This has been implemented to reduce the turnaround time and dependency on the eHealth REGIS team for HOD changes.

An enhanced user is someone who has proven working knowledge of the current Head of Department spreadsheet process. To become an enhanced user, you must demonstrate the ability to use the HOD Upload for Enhanced Users Spreadsheet accurately and be nominated by your manager. All nominations will be vetted by the eHealth REGIS team. For more information on becoming an enhanced user, please contact REGIS@Health.nsw.gov.au.

An enhanced user has additional system access in REGIS, allowing them to make changes to their HOD(s) by uploading the data directly into REGIS themselves. These changes will automatically replace outgoing HOD(s) with the incoming HOD(s), along with their respective pending decisions in REGIS. e.g. any pending decisions that an outgoing HOD has not made will be transferred to the incoming HOD. Changes take less than 15 minutes to reflect on REGIS forms and up to 24 hours for the dashboard(s).

Instructions

Part A: Download the data from the Current Head of Department Dashboard

To reduce manual data entry and ensure accuracy of data being used, please use this method to identify the current Head of Departments. This also helps reduce the effort needed to populate the new spreadsheet to be uploaded. This file provides the data that we will use to populate the HOD Upload for Enhanced Users Spreadsheet.

1. Log into REGIS
2. On the left-hand side menu, click Dashboards, then click Current Head of Department dashboard
3. Using the filter options at the top of the screen, we can filter down to find the relevant HOD(s)
 - a. Research Office: Tick the box next to your Research Office to select it
 - b. HOD Full Name: In the drop down, search for the name(s) of the HOD and tick the box(es) to select more than one

- Under the last table at the bottom titled 'Full List of HoDs', on the right-hand side, click the 'Export' button, then click the Excel icon

Ti...	First N...	Last N...	Email Address	R...	Position Title	Permission ...	Access Rule...	Department	Site	Research O...	Centre	Jurisdi...	StartDate (Export To
	Emma	Inglis	emma.inglis@health...	H...	Departmen...			RH - Speech Pa...	Ryde Hospital	NS - Resear...	Northern Sydney Local ...	NSW ...	18/11/2018	PDF, Image, Excel (highlighted)
	Gary	Rolls	gary.rolls@health.ns...	H...	Head of De...			RNSH - Physiot...	Royal North Sh...	NS - Resear...	Northern Sydney Local ...	NSW ...	17/05/2019	
	Hassan	Kadous	Hassan.kadous@heal...	H...	Manager			RH - Aged care...	Ryde Hospital	NS - Resear...	Northern Sydney Local ...	NSW ...	18/11/2018	

- In the pop-up box, click the 'Export' button

Export To Excel - Full List of HoDs

File Name: Full List of HoDs

Excel Format: XLSX

Separator:

Include: Filters Parameters

Position: Below

Reset Export Cancel

- The Excel file will download to your default download location
- The newly downloaded Excel sheet will list your current HODs. Use this data to compile a list of changes that will be copy-pasted onto the Research Office Enhanced Users Spreadsheet.

A1	Title	First Name	Last Name	Email Address	Role	Position Title	Permission	Access Rule	Department	Site	Research Office	Centre	Jurisdiction	StartDate (Day)
1	Title	Emma	Inglis	emma.inglis@HOD	HOD	Department H			RH - Speech Pi	Ryde Hospital	NS - Research	Northern Sydr	NSW Health	18/11/2018
2		Gary	Rolls	gary.rolls@he	HOD	Head of Depar			RNSH - Physio	Royal North Si	NS - Research	Northern Sydr	NSW Health	17/05/2019
3		Hassan	Kadous	Hassan.kadou	HOD	Manager			RH - Aged care	Ryde Hospital	NS - Research	Northern Sydr	NSW Health	18/11/2018

Note: This downloaded Excel sheet has the same format as the Research Office Enhanced Users Spreadsheet. Use this to copy and paste the relevant fields across the two files (for Part B) (E.G., Column A2 to M2)

- Proceed to Part B

Tips:

- When copying from this file to the Enhanced Users Spreadsheet, do not click on the row number to select the entire row, but rather click and drag to select the row (for E.G. from Column A2 to Column M2)
- Refer to Page 1 of QRG '[New Head of Department Upload](#)' for instructions on how to use the dashboard

Part B: Prepare the File for Upload

Use the Research Office Enhanced Users Spreadsheet to make the required changes in REGIS. The recommended process is to copy and paste the data from the file in Part A into the new sheet. Except for the title, all other fields are mandatory. This is the file we will upload into REGIS.

1. Open a copy of the [HOD Upload for Enhanced Users Spreadsheet](#)
2. Using the data/information from Part A, copy and paste the mandatory fields on this new sheet
3. Specific actions:
 - a. To Add a HOD, under Column A, select Add
 - b. To Remove a HOD, under Column A, select Remove
4. Here is an example of what an accurate, correct sheet looks like:

	A	B	C	D	E	F	G	J	K	L	M	N
1	Action *	Title	First Name	Last Name	Email Address *	Role *	Position Title	Department (Use REGIS Contact Sheet)	SS Contact Search, Leave blank	Research Office *	Centre *	Jurisdiction *
2	Remove position	Dr	Jacob	Williams	jacob.williams@health.nsw.gov.au	HOD	Head of Department	OHS - General Medicine	Orange Health Service	WNSW - Research Office	New South Wales Local Health	NSW Health
3	Add position	Dr	Manik	Mayadunne	manik.mayadunne@health.nsw.gov.au	HOD	Head of Department	OHS - General Medicine	Orange Health Service	WNSW - Research Office	New South Wales Local Health	NSW Health
4	Add position	Dr	Joel	Cooper	joel.cooper@health.nsw.gov.au	HOD	Head of Department	OHS - General Medicine	Orange Health Service	WNSW - Research Office	New South Wales Local Health	NSW Health

5. Save a copy of the file to a preferred location on your computer

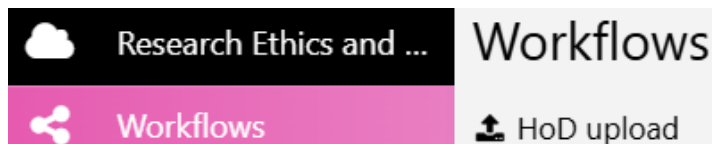
Tips:

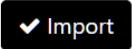
- To ensure accuracy of data entry, as much as possible, please copy and paste the relevant fields from the downloaded file from Part A (including names and email addresses)
- The data needs to match exactly as it appears in REGIS
- Incorrect data will return an error message via email
- Check for common errors such as extra or missing spaces, incorrect hyphens, or incorrect spelling
- Please reach out to the incoming new Head of Department via email/phone and verify if
 - They have a valid current REGIS account
 - What is the email address used for their REGIS account
 - Use this confirmed email address on the spreadsheet
- Making a mistake with the email address (Column E) will create a new user account (e.g. **@heath.nsw.gov** instead of **@health.nsw.gov**). REGIS does not verify if an email address is accurate. To avoid this mistake, please copy and paste from Microsoft Outlook or from another verifiable source (avoid manual data entry). If an incorrect email is used and a duplicate account created, the only way to fix this fault is to log a ticket with the REGIS Technical Helpdesk with a request to merge the accounts.

Part C: Upload the file to REGIS

You can now upload the newly prepared Research Office Enhanced Users Spreadsheet (from Part B) into REGIS. Changes made take under 15 minutes to reflect on REGIS forms and up to 24 hours on the dashboard(s).

1. Log into REGIS
2. On the left-hand side menu, navigate to Workflows then click HoD upload



3. Upload your completed Spreadsheet from Part B on this page
4. Click the Import button 
5. Wait a few seconds to receive the Results Completed box
6. Check your email for a success or failure notification email from [no_reply@regis.health.nsw.gov.au](mailto:reply@regis.health.nsw.gov.au)
 - If successful, the subject line will read: “Bulk upload of people and organisations – Success”
 - If not successful, the subject line will read: “Bulk upload of people and organisations – Failure”
7. Check the email attachment titled PeopleAndPositionsLog.csv for further details
8. If there are any errors, please refer to the [HOD Upload Failures FAQ](#) (Part D) and correct the errors on the original Research Office Enhanced Users Spreadsheet (from Part B)
9. Once the errors are corrected on this sheet, please follow the instructions here again to re-upload the corrected data

Note: All the data needs to be correct for the upload to be successful. If the sheet has error(s), no changes will be made until those error(s) are corrected.

Part D: Error Messages

The most common errors on the spreadsheet are related to Position Titles, Department and Site names. Your data on the spreadsheet needs to match exactly as it appears in REGIS. To avoid these types of errors, please copy and paste the data onto the Research Office Enhanced Users Spreadsheet directly from the Current Head of Department dashboard spreadsheet that was exported from Part A.

If there are errors, you will receive an email notifying you of the error. The email will come from no_reply@REGIS.health.nsw.gov.au and will have the subject: "Bulk upload of people and organisations – Failure".

Open the PeopleAndPositionsLog.csv file to check for the errors. Please refer to the [HOD Upload Failures FAQ](#) to identify and fix the errors on your spreadsheet.

Example of a Common Error

In the example below, entering the Department as 'Emergency' instead of 'RNS - Emergency' will cause an error as shown.

J	K	L
Department*	Site*	Research Office *
Emergency	Royal North Shore Hospital	NS - Research Office
RNS - Emergency	Royal North Shore Hospital	NS - Research Office

O	P	Q
Jurisdiction	LogType	Message
NSW Health	Error	Existing Department must be supplied for a Head of Department
NSW Health	Error	Existing Site must be supplied for a Head of Department

The 'Message' Column Q contains the fault associated with the incorrect data. In this instance, once the Department name is corrected to 'RNS - Emergency', the upload will be successful.

Tips:

- If you are unable to troubleshoot certain errors, cut and paste those faulty entries to another sheet, saving them for later
- Upload the sheet minus the problematic entries as in Part C again
- Contact the [eHealth REGIS team](#) for any help