

ETO TARGETED WEBINAR

Batch Upload Best Practices Webinar



Meet Your Trainer

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Learning Objective

This session will review best practices for working with the Batch Upload tool within ETO.

Agenda

Access Level

Start Fresh

Key Data Review

Test Data

Access Level

Access Level

- Respects security settings
- Lack of access will cause upload to fail
- Can you access the data entry screen directly in ETO?

The screenshot displays the ETO Admin interface. The top navigation bar includes the ETO logo, the user name 'ETO Admin HOL', and the role 'Case Management'. There are buttons for 'CHANGE', 'REPORTING', and 'MESSAGES'. A search bar is present with the text 'Search Term(s)...'. Below the search bar, there are filters for 'Within' and 'Participants'. The main content area is titled 'Record TouchPoint'. A dropdown menu is open, showing a list of TouchPoints. The dropdown is highlighted with a red box. The list includes: '-- Select a TouchPoint --', '1. Emergency Contact (Case Management)', '2. Initial Needs Assessment (Case Management)', 'Arizona Self-Sufficiency Matrix', 'Client Contact', 'Goal Plan (Case Management)', and 'Referral Form'. The sidebar on the left contains navigation options: 'My Work', 'Entities', 'Scheduling', 'Collections', and 'TouchPoints'. Under 'TouchPoints', there are sub-options: 'Record TouchPoints' and 'View Anonymous TouchPoints'.

Start Fresh

Start Fresh

- Always download a fresh template
- Paste without formatting

Batch Upload

Generate Template

Select Template Type...

Upload File

Select Type...

Complete | In Progress | Error

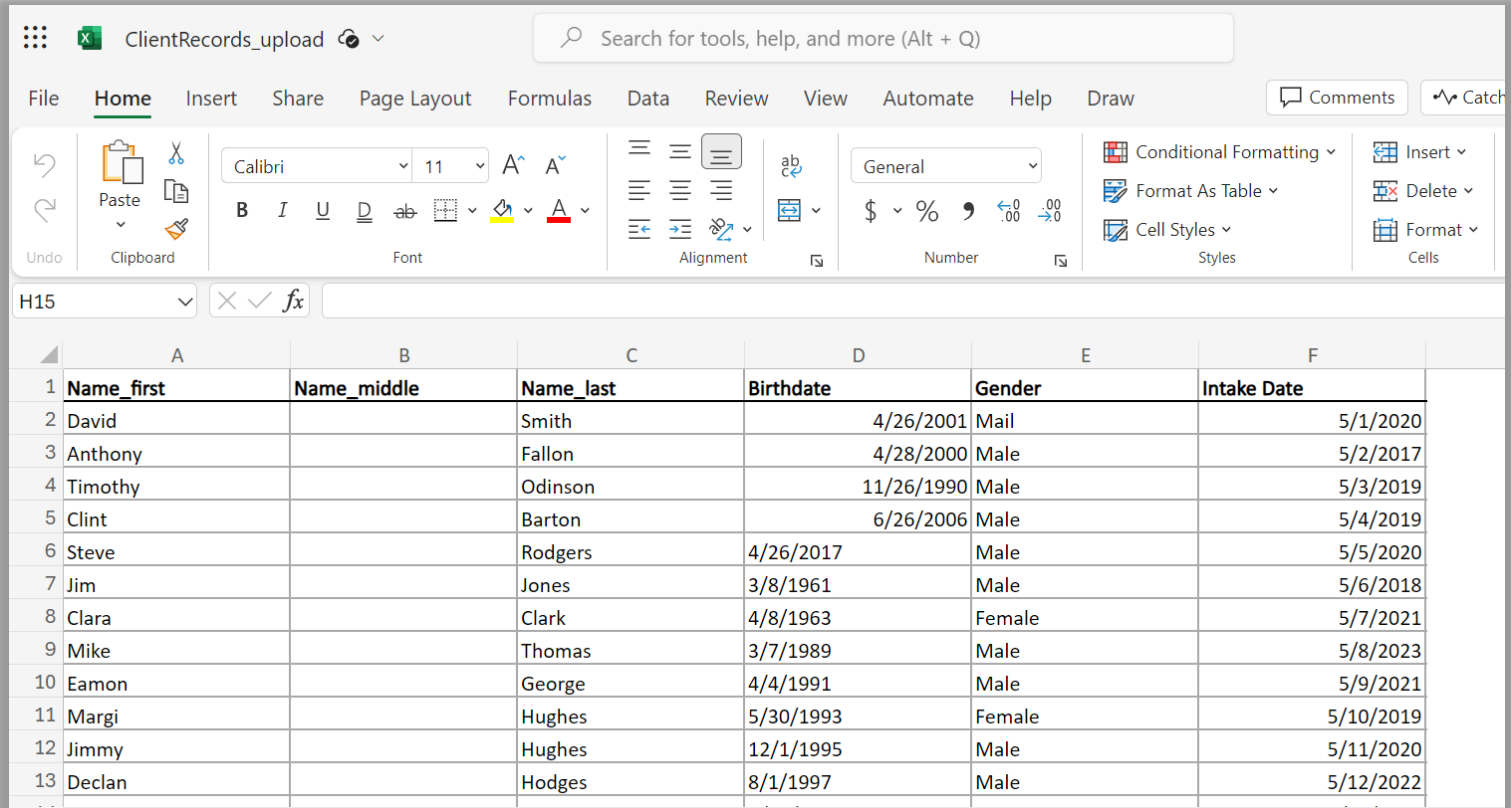
Take Action	File Name	Batch Upload Type	Received	Accepted	Not Inserted	Date Uploaded	Staff
Original File Uploaded File	Batch Upload 5 12 20 19c7ae6faf244acbad14d5d5f53e6051 20200512 163948	Participant	7	7	0	Tue May 12 2020 16:39:49 GMT-0400 (Eastern Daylight Time)	HOL

Paste Options:

Key Data Review

Key Data Review

- Complete all required fields
- Complete Duplicate Check details
- Are dates accurate?



The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F
1	Name_first	Name_middle	Name_last	Birthdate	Gender	Intake Date
2	David		Smith	4/26/2001	Mail	5/1/2020
3	Anthony		Fallon	4/28/2000	Male	5/2/2017
4	Timothy		Odinson	11/26/1990	Male	5/3/2019
5	Clint		Barton	6/26/2006	Male	5/4/2019
6	Steve		Rodgers	4/26/2017	Male	5/5/2020
7	Jim		Jones	3/8/1961	Male	5/6/2018
8	Clara		Clark	4/8/1963	Female	5/7/2021
9	Mike		Thomas	3/7/1989	Male	5/8/2023
10	Eamon		George	4/4/1991	Male	5/9/2021
11	Margi		Hughes	5/30/1993	Female	5/10/2019
12	Jimmy		Hughes	12/1/1995	Male	5/11/2020
13	Declan		Hodges	8/1/1997	Male	5/12/2022

Test Upload

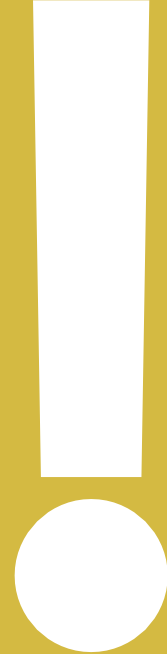
Test Upload

- Make a copy file
- Test load 2 Rows
- Make corrections

	A	B	C	D	E	F
1	Name_first	Name_middle	Name_last	Birthdate	Gender	Intake Date
2	David		Smith	4/26/2001	Mail	5/1/2020
3	Anthony		Fallon	4/28/2000	Male	5/2/2017
4						
5						
6						
7						
8						
9						
10						
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19						

Keep In Mind

We **do not** recommend uploading **over 600 rows** at once. Larger files may take longer to process.



Additional Resources

Additional Training Opportunities

- [Knowledge Base](#) – How-To Articles (Search Chat or Visit Online)
- [Bonterra Academy](#) – Free Webinars & Recordings
- [Foundations](#) – Intensive, Multiday Courses to Cover Admin Basics
- [Admin Labs](#) – 2 Hour Live Trainings on Specific Capabilities



Build confidence & knowledge in
our software!

Customer Support

Reach out to our Customer Support Team with Questions or Concerns.

Weekdays 7am – 7pm CST via chat or through email: eto@bonterratech.com

Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you for attending!

We hope to see you
in future trainings.