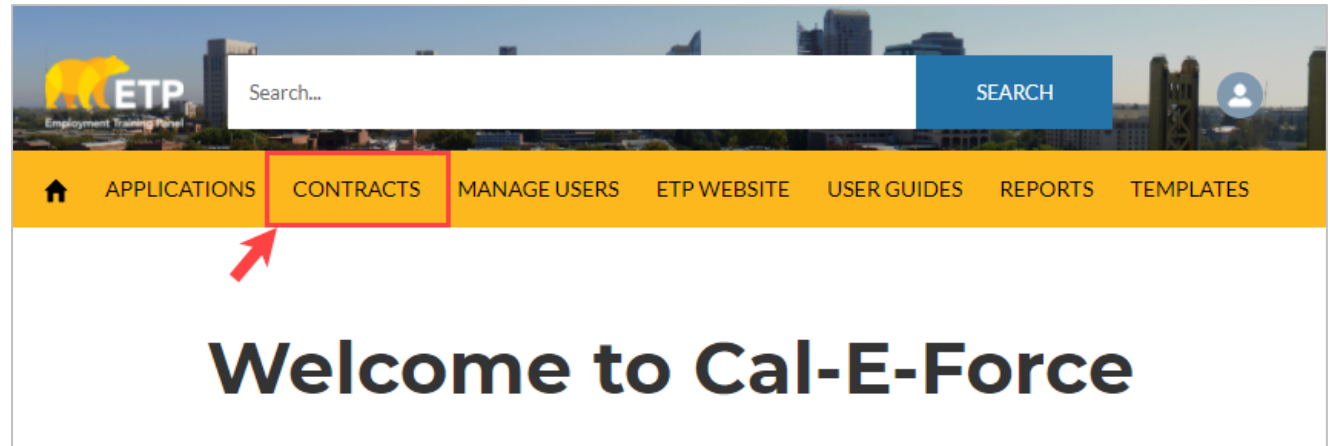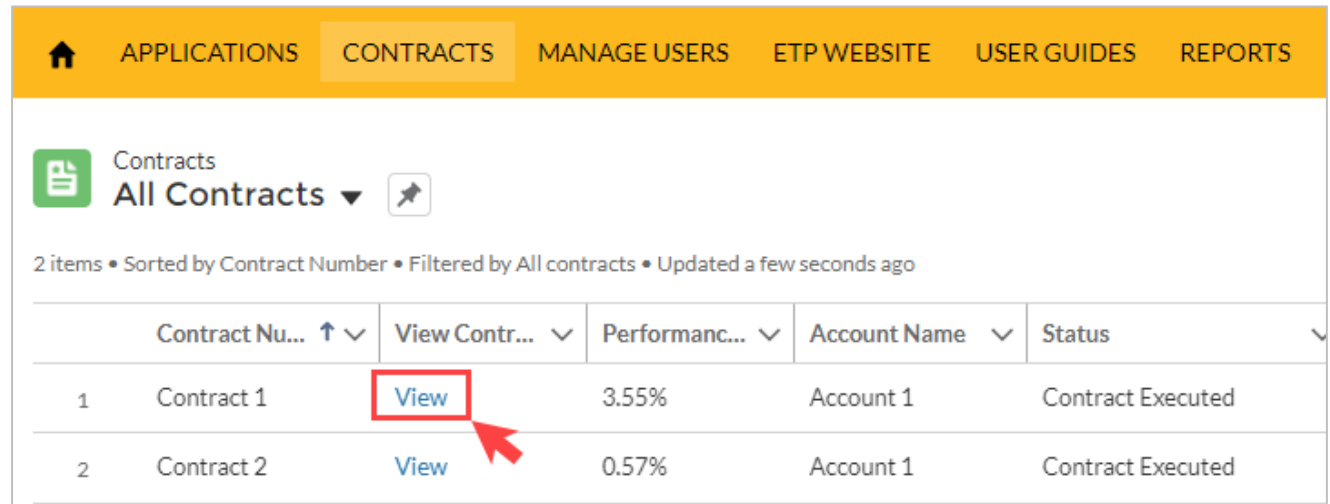# CAL-E-FORCE REFERENCE GUIDE: MASS UPDATE TRAINEES

This guide is for mass updating already enrolled trainees. To enroll new trainees, refer to the Upload Trainees or Manually Enroll Trainees Reference Guides
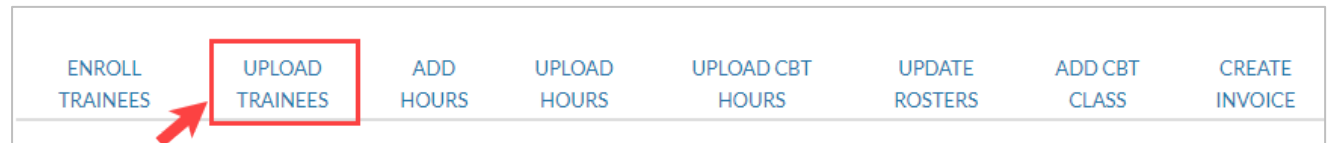
1. At the top of the landing page, select the **Contracts** button on the button bar

2. Click on the **View** hyperlink for the contract for which you would like to update trainees. The system will take you to that contract/s detail page

3. Select the **Upload Trainees** button on the button bar which is located at the top of the Contract Details page.

4. If you do not yet have a CSV containing the trainees you are editing in the required format, select **Click Here** to download the template and upload codes

Upload Trainees

Please Upload your CSV file here: [Choose File] No file chosen   [Upload]   [Back]

Note: Please use the standard template to upload Trainees data. Click Here to download the template
Click Here to download the Upload Codes.

5. On the **Upload Codes** document, the instructions on how to fill out the template are located at the top of the template page. Cal-E-Force also provides the associated codes needed to fill out the template in the remaining tables

For example, for the Age Group column, if I was enrolled a trainee who was 30 years old I would enter "2" in that template column

* Note: The **Location Number** can be found on the **Entities and Locations** list view on the Contract Detail Page

SSN	Employee ID	Trainee First Name	Trainee Last Name	Job Number	Workplace	Hire Date
Enter the SSN of the Trainee.	Enter the Employee ID for the Trainee. This will be used as the Unique Identifier for the trainee in the system.	Enter the First Name of the Trainee	Enter the Last Name of the Trainee	Enter the Job Number of the trainee.	Enter the workplace of trainee.	Enter hire date of trainee.
Format: ###-##-#### or #########		Format: Text	Format: Text	Format: Whole numbers only	Format: Whole numbers only.	Format: Standard US Date format: MM/DD/YYYY
	A system-generated ID will be provided if an employee id is not provided			EX: If Job Number is 1, then enter 1.	EX: If Location number is 1, then enter 1.	
Note: Please change the cell/column format to 'TEXT' in Excel if you are entering SSNs *without* dashes. This will prevent any leading zeros from being dropped.	Format: Can contain both numbers and letters					
	Note: If Employee IDs begin with leading zeros, please					

Gender	Code		Age Group	Code		Veteran	Code		Disabled	Code
Male	M		Less Than 25	1		Yes	Y		Yes	Y
Female	F		25 – 34	2		No	N		No	N
Non-binary	N		35 – 44	3		Unknown	U		Unknown	U
			45 – 54	4						
			55 – 64	5						
			65 & Older	6						

Ethnicity	Code		Education	Code		Orientation	Code		Identity	Code
White	1		Eighth Grade or less	1		Decline to State	0		Decline to State	0
Black	2		High School Grad	2		Lesbian	1		Female	1
Hispanic	3		GED	3		Gay	2		Male	2
Native American	4		Some College	4		Bisexual	3		Trans Male/Trans Man	3
Asian	5		College Grad	5		Queer	4		Trans Female/Trans W	4
Pacific Islander	6		Post College Grad	6		Heterosexual/Straight	5		Genderqueer/Gender	5
Filipino	7		Some High School	7		Pansexual	6		Non-Binary	6
Other	8					Asexual	7		Not Sure	7
						Questioning	8		Another Identity	8
						Not Sure	9			
						Another Orientation	10			

Sex at Birth	Code
Male	M
Female	F

6. To help fill out the CSV, you may export the Trainees by Contract report. Refer to the Accessing Reports Reference Guide

REPORT
Trainees by Contract

7. If using a PC, save the file as a **CSV (Comma delimited) file**. If using a Mac, save as **Comma Separated Values (.csv)**	**PC USERS:** Save as type: Excel Workbook ✓ CSV (Comma delimited) ✗ CSV (Macintosh) ✗ CSV (MS-DOS)	**MAC USERS:** File Format ✓ Excel Workbook (.xlsx) ✗ CSV UTF-8 (Comma delimited) (.csv) ✓ Comma Separated Values (.csv) ✗ Windows Comma Separated (.csv) ✗ MS-DOS Comma Separated (.csv)
8. When your CSV is prepared, click the **Choose File** button and select your CSV.	**Upload Trainees** Please Upload your CSV file here: Choose File No file chosen Upload Back Note: Please use the standard template to upload Trainees data. Click Here to download the template Click Here to download the Upload Codes.	
9. Click the Upload button.	**Upload Trainees** Please Upload your CSV file here: Choose File No file chosen Upload Back Note: Please use the standard template to upload Trainees data. Click Here to download the template Click Here to download the Upload Codes.	
10. The system will provide you with a summary of the upload file *This summary will only display the first 50 rows from the file selected*	**For your reference here is a sample list of Trainee Records that are being uploaded** See table below.	

For your reference here is a sample list of Trainee Records that are being uploaded

SSN	EMPLOYEE ID	TRAINEE FIRST NAME	TRAINEE LAST NAME	JOB NUMBER	WORKPLACE	HIRE DATE	GENDER CODE
***-**-4453	7897	Bethenny	Frankel	Retrainees	Vanderpump Dogs HQ	5/15/2019	F
***-**-4444	7898	Luann	de Lesseps	Retrainees	Vanderpump Dogs HQ	5/16/2019	F
***-**-1234	7899	Ramona	Singer	Retrainees	Vanderpump Dogs HQ	5/17/2019	F

11. Click the **Upload Trainees** button to complete your upload

For your reference here is a sample list of Trainee Records that are being uploaded

SSN	EMPLOYEE ID	TRAINEE FIRST NAME	TRAINEE LAST NAME	JOB NUMBER	WORKPLACE CEAN	WORKPLACE	HIRE DATE	WAGE AT
***-**-7777	TID-1844	alayna	mollick	Retrainee	123-1232	Office	1/1/2000	
***-**-7776	TID-1845	amina	nasufovic	Retrainee	123-1232	Office	1/1/2000	
***-**-7775	TID-1846	geri	giron	Retrainee	123-1232	Office	1/1/2000	
***-**-7774	TID-1847	madison	hummel	Retrainee	123-1232	Office	1/1/2000	
***-**-7773	TID-1848	jenny	phang	Retrainee	123-1232	Office	1/1/2000	

When you are satisfied with the records above, click the Upload Trainees button to upload the trainee records.

Upload Trainees

12. You will receive a confirmation message stating your upload is in progress. You can navigate away from the page at any time. The file will process the upload in the background while you continue to work.

   The processing time is dependent on the file size.

Your upload is processing. *You may navigate away from this page at any time.* You will receive an email when the upload is finished, including a link to any errors.

Ok

13. You will receive an email when the upload is complete. If there are any errors there will be a link to a report that will present the errors from the upload

    This email will go to the user who submitted the upload

noreply@salesforce.com on behalf of Contact9+ <kelsey.oehrke@etp.ca.gov>   Oehrke, Kelsey@ETP

Sandbox: Trainee Upload Success Email

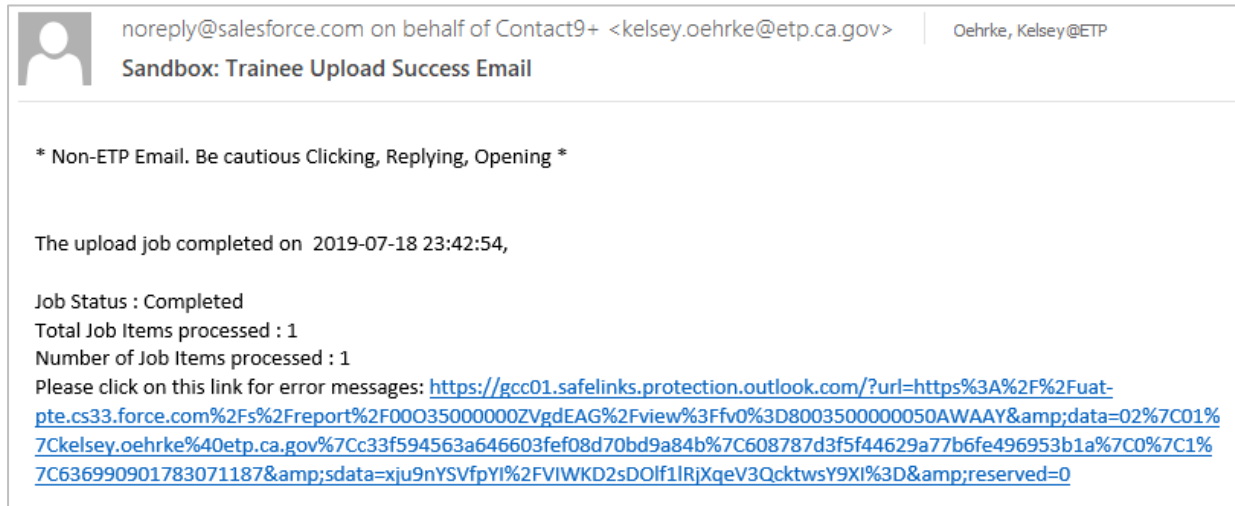* Non-ETP Email. Be cautious Clicking, Replying, Opening *

The upload job completed on 2019-07-18 23:42:54,

Job Status : Completed
Total Job Items processed : 1
Number of Job Items processed : 1
Please click on this link for error messages: https://gcc01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fuat-pte.cs33.force.com%2Fs%2Freport%2F00O35000000ZVgdEAG%2Fview%3Ffv0%3D8003500000050AWAAY&data=02%7C01%7Ckelsey.oehrke%40etp.ca.gov%7Cc33f594563a646603fef08d70bd9a84b%7C608787d3f5f44629a77b6fe496953b1a%7C0%7C1%7C636990901783071187&sdata=xju9nYSVfpYI%2FVIWKD2sDOlf1lRjXqeV3QcktwsY9XI%3D&reserved=0

14. Click on the link to view the Trainees Upload Error Report

    This report shows upload errors for the present day automatically. To edit the date, click on the funnel icon to change the date criteria

Report: Contracts with Upload Transactions
Upload Trainees Error Report

Add Chart   Export

Total Records
0

Filters

Uploading Date/Time
Today (On Nov 19, 2021)

🔒 Type
equals Trainees Upload

Contract Number
contains ""