

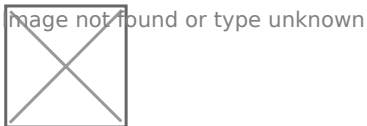
How to Import Employees Using Excel

1. Before you start

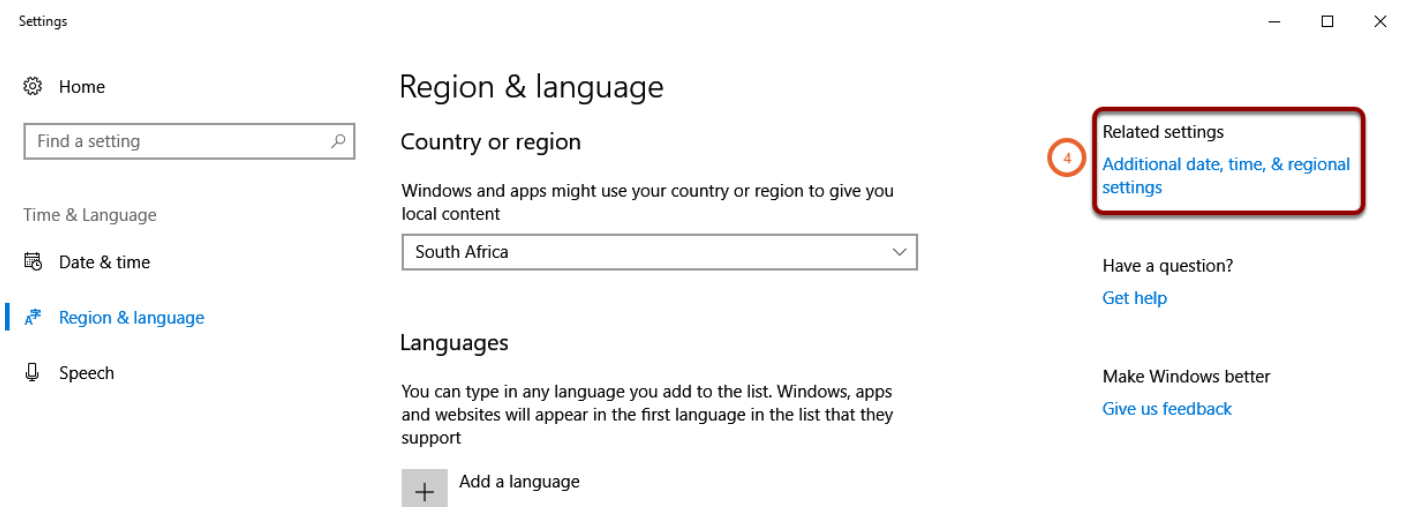
Important: Before you start with this manual ensure that your Region settings are correct, otherwise the Excel (.csv) files will not work correctly.

1.1. How to get there?

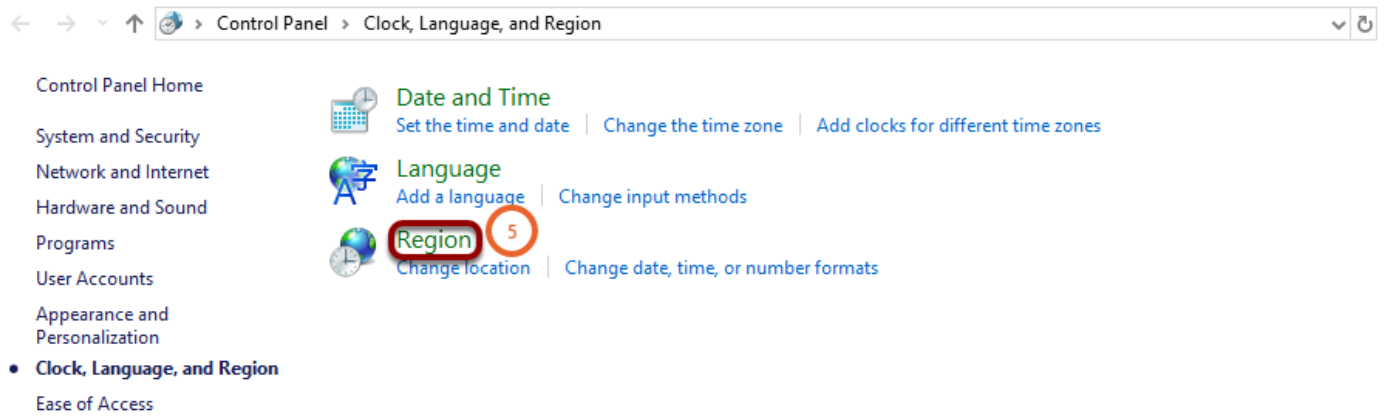
- On your desktop click on Search (1).
- Then type Region & language settings (2).
- Click on Region & language settings (3) or press Enter. A new window will open.



- In the new window click on Additional date, time & regional settings (4). Another new window will open.



- In the new window navigate to and click on Region (5). A new window will open.



- In the Region window click on Additional Settings... (6). A new window will open.

Image not found or type unknown



1.2. What to do?

- In the new window ensure that the Decimal symbol (7) is a full stop (.).
- Ensure that the List separator (8) is a comma (,).
- Click Apply (9) and close all the windows.

Image not found or type unknown



2. How to get there?

Click on System Administration (1). With your cursor hover over System Administration (2) then click on Import Data (3)

Image not found or type unknown



Image not found or type unknown



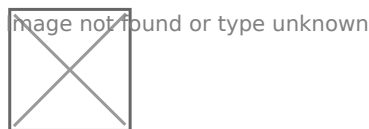
3. What to do?

3.1. Download a sample file on Signify

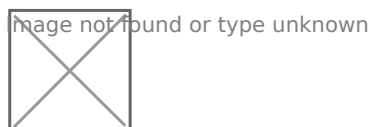
- Navigate to Employee Import (1).
- Click on Click here to... (2).
- A small windows will open.

Click here to...	2 3	Employee Import	1	Field Separator (,); Text Qualifier (None); First row contains field names	comImport_Custom_00508	
----------------------------------	-----	------------------------	---	--	------------------------	---

- Click Download sample file (3) in the new window.



- The sample file will download in your browser (4).



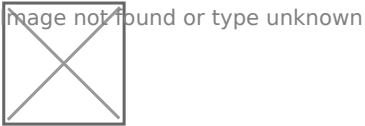
3.2. Create an employee import (.csv) file in Excel

3.2.1. Enter the employee data in an Excel document (.xlsx)

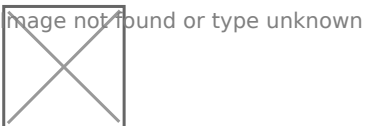
- Open the sample file downloaded [above \(4\)](#).
- Select the entire first row (1) in the sample file.
- Copy the entire row (2).

EmployeeSurname	FullName	MaidenName	KnownAs	Initials	ID	TelAreaW	TelNoH	CellNo	Email	EmpTitle	Location	OrgLevel1	OrgLevel1Business	Business	OrgLevel2	OrgLevel2Business	Business	OrgLevel3	OrgLevel3Business	B
Update01	Batton	Romelia		R	26				BattonRomelia@mail.com		1_21/12/2 CC Smollan Local	21/12/2016								
Update02	Griffeth	Chiquita			2				GriffethChiquita@mail.com		1_21/12/2 CC Smollan Local	21/12/2016								
Update03	Grana	Tom		T					GranaTom@mail.com		1_21/12/2 CC Smollan Local	21/12/2016			2_21/12/2_2 CC Smollan Local	21/12/2016				
Local39	Richie	Ingrid		I					RichieIngrid@mail.com		1_21/12/2 CC Smollan Local	21/12/2016			2_21/12/2_2 CC Smollan Local	21/12/2016				
Local35	Loyd	Tonja		T					LoydTonja@mail.com		1_21/12/2 CC Smollan Local	21/12/2016			2_21/12/2_2 CC Smollan Local	21/12/2016				
Local36	Debose	Filiberto		F					DeboseFiliberto@mail.com		1_21/12/2 CC Smollan Local	21/12/2016			2_21/12/2_2 CC Smollan Local	21/12/2016				
23CNV6	Villani	Stacie		S					VillaniStacie@mail.com		1_21/12/2 CC Smollan Local	21/12/2016			2_21/12/2_2 CC Smollan Local	21/12/2016(2)			3_CC Smollan Local	21/12/2016
8H6VYV	Narron	Matt		M					NarronMatt@mail.com		1_21/12/2 CC Smollan Local	21/12/2016			2_21/12/2_2 CC Smollan Local	21/12/2016			3_21/12/2_3 CC Smollan Local	21/12/2016
Local37	Radcliffe	Richie		R					RadcliffeRichie@mail.com		1_21/12/2 CC Smollan Local	21/12/2016			2_21/12/2_2 CC Smollan Local	21/12/2016(2)			3_CC Smollan Local	21/12/2016
Local40	Johnsen	Iris		I					JohnsenIris@mail.com		1_21/12/2 CC Smollan Local	21/12/2016			2_21/12/2_2 CC Smollan Local	21/12/2016(2)			3_CC Smollan Local	21/12/2016

- Create a New Microsoft Excel Worksheet (3).



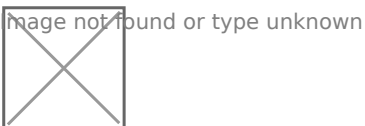
- Open the new work sheet and Paste (4) the entire first row copied above into your new Excel documents First (5) row.
- Enter all the employee data in the mandatory columns.
- These columns are all mandatory:
 - Column A: Employee Number.
 - Column B: Surname.
 - Column C: Full Name.
 - Column O: OrgLevel1_Description.
 - Column BC: Job Title.
 - Column BM: Employment Type Description.
 - Column EL: SchemaID.



3.2.2. Save the Excel document as a (.csv) file

Save the new Excel document as a .csv file:

- Click on File (6).
- Navigate to Save As (7).
- Click on Browse (8).
- Insert the File name (9) of your (.csv) file.
- Click on the drop down (10).
- Select CSV (Comma delimited) (11).
- When asked, Do you want to keep using this format, click on yes (12).



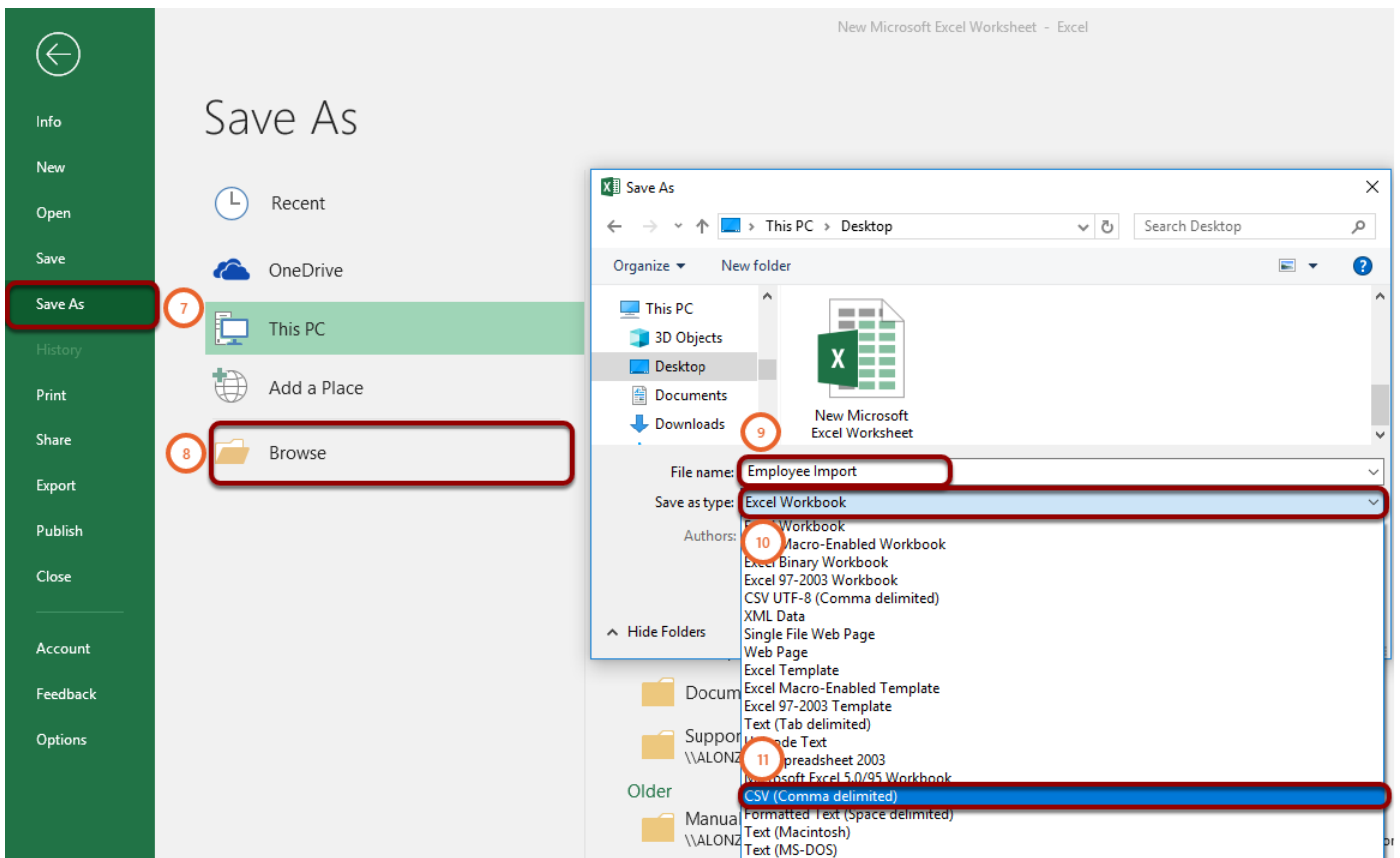


Image not found or type unknown



3.3. Importing the (.csv) file

3.3.1. Execute Mock Import

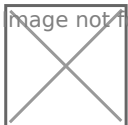
Click on this [link](#) on instructions on how to get there.

- Navigate to Employee Import (1).
- Click on Click here to... (2).
- A small windows will open.

Click here to... (2)	Employee Import (1)	Field Separator (,); Text Qualifier (None); First row contains field names	comImport_Custom_00508
----------------------	---------------------	--	------------------------

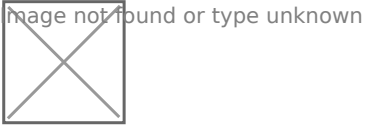
- Click Import file (3) in the new window.

Image not found or type unknown

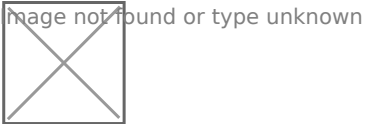


- A new window will load.

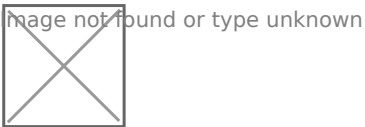
- In the new window navigate and click on Choose File (1).
- A Windows file explorer windows will open.



- Search your computer for the Employee Import file that you saved as a (.csv) in [Section 2.2.2](#).
- Select that file (2).
- Click on open (3).

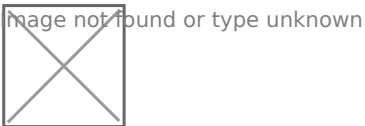


- Click on Save & Preview (4).
- The page will refresh and new options will be available.



- Tick the box I verify that the preview of the above data is correct (5).
- Then click on Execute Mock Import (6).

The system will not allow you to continue if the tick box (5) is not ticked.



If there are errors in the Import:

- Correct the errors in the original Microsoft Excel (.xlsx) employee import document [Section 2.2.1](#).
- Save as a (.csv) file [Section 2.2.2](#).
- Execute the Mock Import again.

If there are no errors (7):

- Click Back (8).
- Then move to [section 2.3.2](#).

Execute Import

Import Information

Reference: 508
Input Type: Mock
Name: Employee Import

Database Feedback [Technical Use Only]

The data has successfully been transferred from the data source to the staging table. Please see the section below for any pre-import validation errors.

Import Outcome and Results

The following is a summary of data that was updated/added during the import

ValidationMessage

No invalid data was generated or found. All validation succeeded.

Validation Message

No invalid overlappings appointments were detected of employees

NewEmployeesMessage

No new employees detected

Execute Again (Mock Import)

Export to Excel

Close

Back


8

3.3.2. Execute actual import

Note: before continuing with this section, first perform a Mock Import in [Section 2.3.1](#) and insure no errors occur.

Click on this [link](#) on instructions on how to get there.

- Navigate to Employee Import (1).
- Click on Click here to... (2).
- A small windows will open.

Click here to... 2 8	Employee Import 1	Field Separator (,); Text Qualifier (None); First row contains field names	comImport_Custom_00508	
--------------------------------------	-----------------------------------	--	------------------------	---

- Click Import file (3) in the new window.
- A new window will load.

Image not found or type unknown

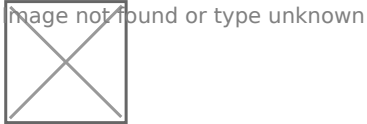


- Click on Choose File (4) again and select the employee import file (.csv) that you saved in [Section 2.2.2](#).

- Click Save & Preview (5).
- Tick the box I verify the preview of the above data is correct (6).

You will not be able to continue if the tick box is not ticked.

- Click on Execute Import (7).



- The page will load and a new page will appear.
- Check if there were no errors for the import (13).
- Click on Execute Again (Actual Import) (14).
- Wait for the import to complete.

Execute Import

Import Information

Reference: 508
Input Type: Actual
Name: Employee Import

Database Feedback [Technical Use Only]

The data has successfully been transferred from the data source to the staging table. Please see the section below for any pre-import validation errors.

Import Outcome and Results

The following is a summary of data that was updated/added during the import

ValidationMessage

No invalid data was generated or found. All validation succeeded.

Validation Message

No invalid overlappings appointments were detected of employees

Execute Again (Actual Import)

Close

Back

3.4. Post Import Validations

Use this guide to ensure the employee data imported was correct and that it is correctly displayed on the system.

3.4.1. Organisation Structure

3.4.1.1. How to get there?

Click on System Administration (1). With your cursor hover over Modules (2) then Organisation Structure (3) then Administration (4) then click on Organisation Structure (5).

image not found or type unknown

image not found or type unknown

3.4.1.2. What to do?

- Ensure that all the node have been created correctly (1).
- Check that the correct number of Positions (2) display.

The screenshot shows the 'Nodes' tab of the 'Company Organisation Structure' interface. The 'Actions' bar includes buttons for 'Remove Node', 'Refresh Organisation Structure', 'View Chart', 'Refresh View', 'Print Organisation Treeview', and 'Back To List'. Below the actions bar, there are 'Expand All' and 'Collapse All' buttons. A red circle with the number 1 highlights the 'Expand All' button. A red box highlights the tree structure of nodes. A red circle with the number 2 highlights the '9 Positions' text next to the 'Bekker & Co - Division 1' node. The tree structure is as follows:

- Company Organisation Structure [Add Child]
 - Bekker & Co. (Pty) Limited (Company Name : 12 Positions ; Code : 1238) [Add Child] [Edit Node] [Link Positions]
 - Bekker & Co - Division 1 (Org Level 1) (9 Positions ; Code : 1239) [Add Child] [Edit Node] [Link Positions]
 - Bekker & Co. - Branch 1 (Org Level 2) (10 Positions ; Code : 1240) [Add Child] [Edit Node] [Link Positions]
 - Career Campus (4) (Company Name : 12 Positions ; Code : Career Campus (4)) [Add Child] [Edit Node] [Link Positions]
 - Career Conversation (Pty) Ltd (Company Name : 12 Positions ; Code : CC - 1) [Add Child] [Edit Node] [Link Positions]

3.4.2. Job Profiler

3.4.2.1. How to get there?


Click on System Administration (1). With your cursor hover over Modules (2) then Job Management (3) then click on Job Profiler (4).

image not found or type unknown

image not found or type unknown

3.4.2.2. What to do

Search (1) for the Job Titles (2) and Job Codes (3) that you have imported to ensure that the jobs and positions have been created properly.

 Job Profile List

Job Profile Search

Job Code ³ Job Title ² Administration Status

Compiler Lock Status

¹ Total number of Profiles: 136

3.4.3. Manage Employees

3.4.3.1. How to get there?

Click on System Administration (1). With your cursor hover over Modules (2) then click on Manage Employees (3).

Image not found or type unknown




Image not found or type unknown



3.4.3.2. What to do?

When searching for employees remember to select the correct box (1).

- A Search for your employees (2).
- Click on Search (3).
- Navigate to and click on Action (4). A small window will open.
- Click on View / Edit (5) on this window.

Home  Employee List

Employees

Administration Master Data

Switch Schema

Search Employees ¹

☐ Current Employees ☐ Previous Employees ☐ All

Employee Number Name Surname ID Number

Job Code Position

Number of Employees in All Employees: 1480

Actions	Employee Number	Surname	Name	ID Number	Position	Location in organisation	Schema
⁴ <input type="button" value="Action"/>	Captain Kurk		Captain	93091350190873	Manager	Company	[4] Orange / Purple

⁵

Close

Terminate Employee
View Employee Profile
View Learner Records
View Licences

- Click on the plus icon Organisational Assignment (1).
- Navigate to Appointment History (2).
- Confirm that the appointments are all correct (3).

Home

Employees

1 Employee Profile

2 Appointment History

3 Previous Employment

Reporting Lines

Employee Development

Employee Relations

Compliance

Administration

Master Data

Appointment History (Captain Kurk, Captain Kurk)

This page displays the history of the employee's employment at this company. Here you also have various action items. You can Terminate, Transfer, Appoint the employee in another position, or simply make a correction. Previous employment is captured in another section.

Smart Navigation

Smart Nav Type detail relating to an employee e.g. Employee Number, Surname, Name

Search

Keyword (in Position Code OR Position OR Schema OR Appointment Type OR Reason for ending)

Between Start Date And End Date

Search Clear

Start Date in Group

Start Date in Group 2019/03/07 Change

Transfer Employee Terminate Employee Appoint employee in another Position

Action	Position Code	Position	Location in organization	Schema	Appointment Type	Primary Position	From	To	Notice Period	Reason for ending	Remove
Action	80260103	Manager	Company	[4] Orange / Purple	Permanent	<input checked="" type="checkbox"/>	2019/03/11	Present	0 month(s)		
	80260097	Learner	Company	[2] Grey	Permanent	<input checked="" type="checkbox"/>	2019/03/07	2019/03/11	0 month(s)		

- Click on the plus icon at Employee Profile (4).
- Confirm that the details are correct (5).

Home

Employees

4 Employee Profile

5 Personal Information

Additional Information

Address

Contact Detail

Documents

Dietary Requirements

Custom And Additional Information

Family History

Vehicle

Next Of Kin

Hobbies and Interests

Criminal Record

Licences

Permit

Medical History

Assets

Leave

Employee Funding

Custom Field

Talent Profiles

Notification Detail

Personal Information Detail (Captain Kurk, Captain Kurk)

Edit Photo

An employee's basic personal and biographical information.

Employee Search List > [Ref. 1692] (Captain Kurk) Captain Kurk

Smart Navigation

Smart Nav Type detail relating to an employee e.g. Employee

Detail

Personal Detail

Employee Number Captain Kurk *

Override Employee Number ☐

Surname Kurk *

Maiden Name

Trading Name ☐

Revision #2

Created 28 March 2021 16:22:28 by Lizette Lotter

Updated 31 March 2021 15:52:03 by Lizette Lotter