

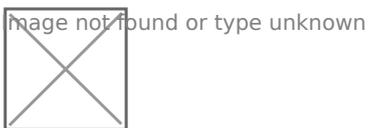
# How to Import Employees Using Excel

## 1. Before you start

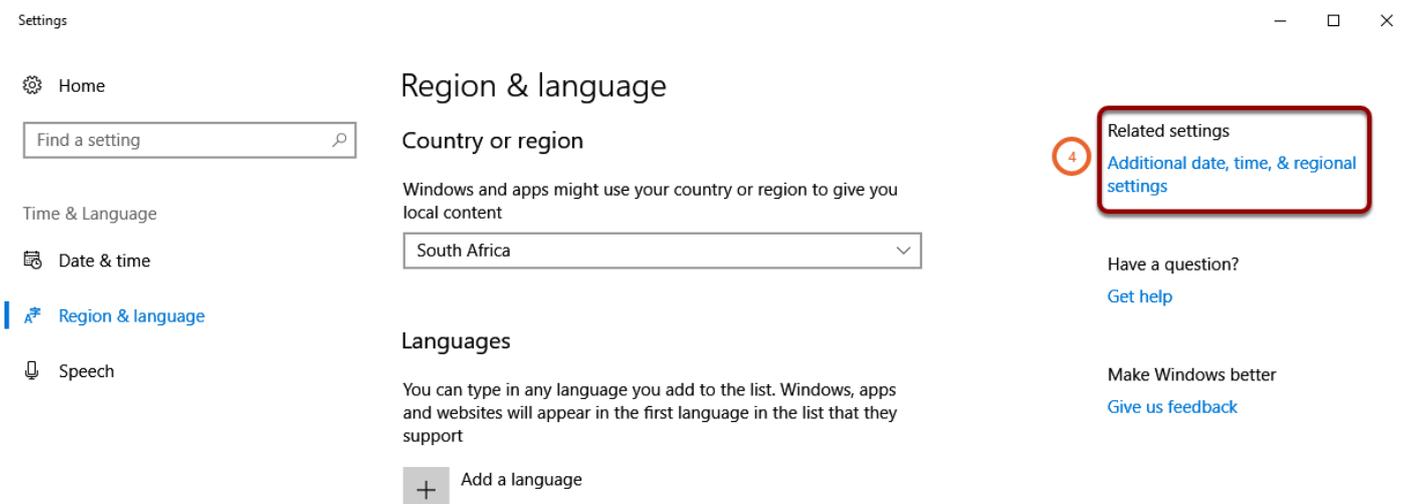
Important: Before you start with this manual ensure that your Region settings are correct, otherwise the Excel (.csv) files will not work correctly.

### 1.1. How to get there?

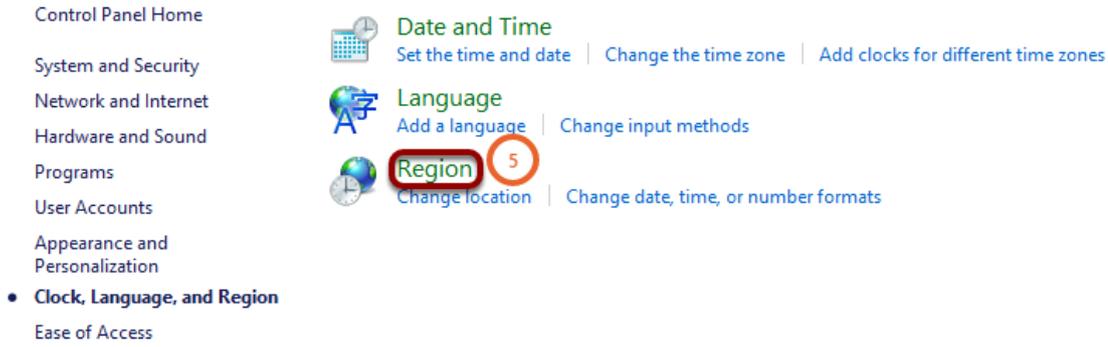
- On your desktop click on Search (1).
- Then type Region & language settings (2).
- Click on Region & language settings (3) or press Enter. A new window will open.



- 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.

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## 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.

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## 2. How to get there?

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

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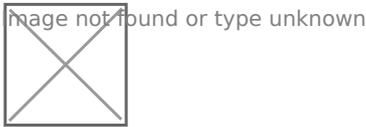
# 3. What to do?

## 3.1. Download a sample file on Signify

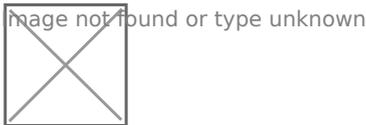
- Navigate to Employee Import (1).
- Click on Click here to... (2).
- A small windows will open.



- Click 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).

A screenshot of an Excel spreadsheet. The first row is highlighted in red. A context menu is open over the first row, with 'Copy' selected. The spreadsheet contains the following data:

	EmployeeSurname	FullName	MaidenNz KnownAs	Initials	FN	TelNoH	CellNo	Email	EmpTitle	Location	OrgLevel1	OrgLevel1 Business	Business	OrgLevel2	OrgLevel2 Business	Business	OrgLevel3	OrgLevel3 Business	Business
1	Update01	Batton	Romelia	R	06	000		BattonRomelia@mail.com			1	21/12/2	CC Smollan Local 21/12/2016						
2	Update02	Griffeth	Chiquita					GriffethChiquita@mail.com			1	21/12/2	CC Smollan Local 21/12/2016						
4	Update03	Grana	Tom					GranaTom@mail.com			1	21/12/2	CC Smollan Local 21/12/2016	2	21/12/2	2	CC Smollan Local 21/12/2016		
5	Local39	Richie	Ingrid					RichieIngrid@mail.com			1	21/12/2	CC Smollan Local 21/12/2016	2	21/12/2	2	CC Smollan Local 21/12/2016		
6	Local35	Loyd	Tonja					LoydTonja@mail.com			1	21/12/2	CC Smollan Local 21/12/2016	2	21/12/2	2	CC Smollan Local 21/12/2016		
7	Local36	Debose	Filiberto					DeboseFiliberto@mail.com			1	21/12/2	CC Smollan Local 21/12/2016	2	21/12/2	2	CC Smollan Local 21/12/2016		
8	23CNVE6	Villani	Stacie					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(2)
9	8H6YVGS	Narron	Matt					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
10	Local37	Radcliffe	Richie					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(2)
11	Local40	Johnsen	Iris					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(2)

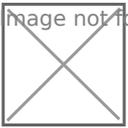
- Create a New Microsoft Excel Worksheet (3).

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- 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.

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### 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).

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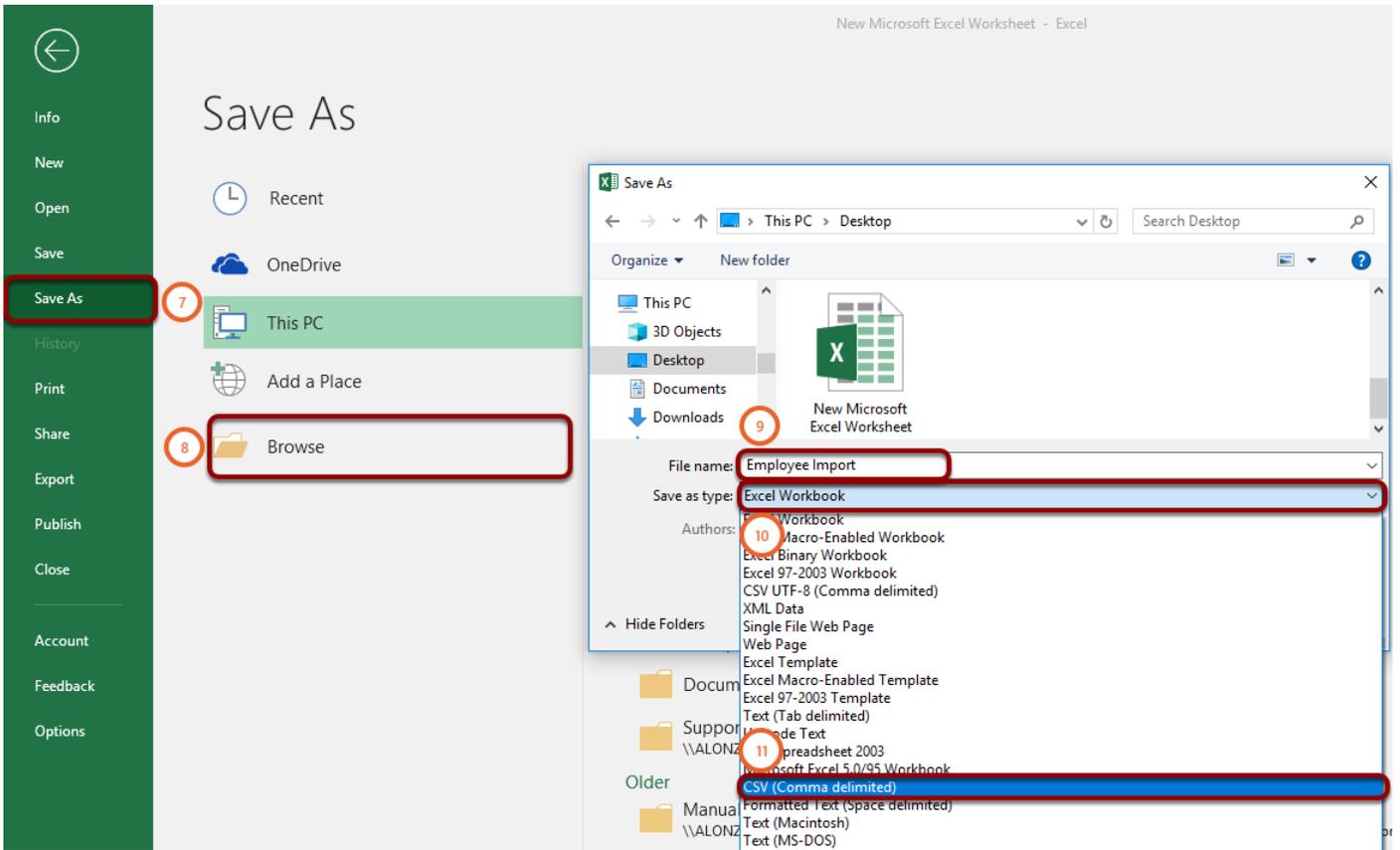


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## 3.3. Importing the (.csv) file

### 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 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.

image not found or type unknown



- 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).

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

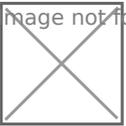
image not found or type unknown



- 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.

image not found or type unknown



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

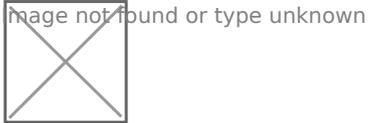


- Click on Choose File (4) again and select the employee import file (.csv) that you saved in [Section 2.2.2](#).

- 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).

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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 a web interface for 'Company Organisation Structure'. It has tabs for 'Detail' and 'Nodes'. Below the tabs is an 'Actions' bar with buttons: 'Remove Node', 'Refresh Organisation Structure', 'View Chart', 'Refresh View', 'Print Organisation Treeview', and 'Back To List'. Below the actions are 'Expand All' and 'Collapse All' buttons. A red circle with the number '1' is around the 'Expand All' button. Below this is a tree view of nodes. A red box highlights the tree structure. The nodes are: '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]', and 'Career Conversation (Pty) Ltd (Company Name ; 12 Positions ; Code : CC - 1) [Add Child] | [Edit Node] | [Link Positions]'. A red circle with the number '2' is around the '9 Positions' value for 'Bekker & Co - Division 1'.

## 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  Job Title  Administration Status

Compiler  Lock Status

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).

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### 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

Switch Schema

Search Employees

Employee Number  Captain Kurk 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
<input type="button" value="Action"/>	...	...	Captain	93091350190873	Manager	Company	[4] Orange / Purple

View / Edit  
 Remove 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

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)		<input type="lock"/>
	80260097	Learner	Company	[2] Grey	Permanent	<input checked="" type="checkbox"/>	2019/03/07	2019/03/11	0 month(s)		<input type="checkbox"/>

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

Home

Employees

Employee Profile (4)

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  \*

Override Employee Number

Surname  \*

Maiden Name

Trading Name

Revision #2

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

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