# How to Import Employees Using Excel

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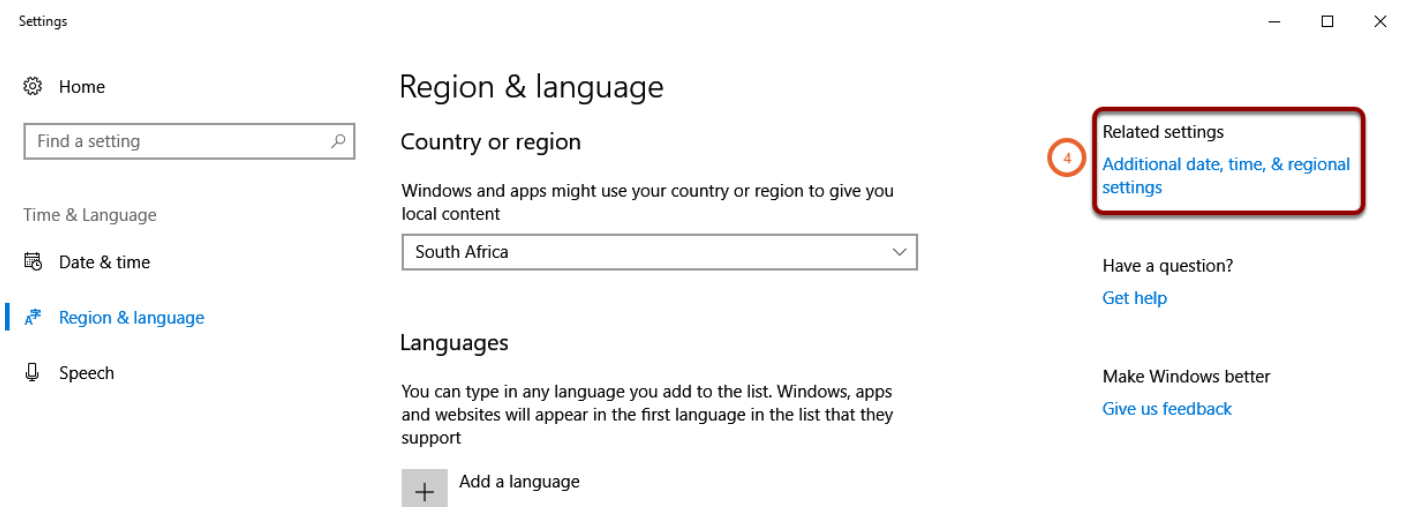
Important: Before you start with this manual ensure that your Region settings are correct, otherwise the Excel (.csv) files will not work correctly.
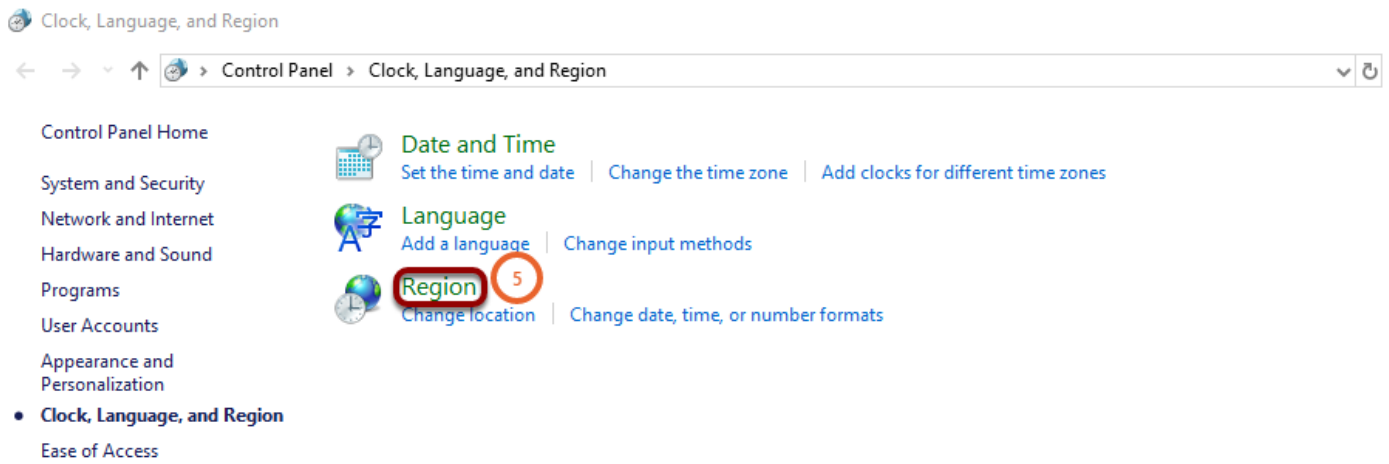
1.1. How to get there?

- 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.
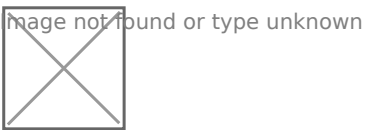

Image not found or type unknown
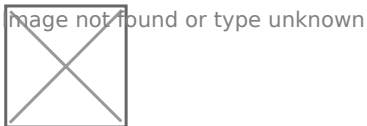
- In the new window click on Additional date, time & regional settings (4). Another new window will open.

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

Control Panel Home

System and Security

Network and Internet

Hardware and Sound

Programs

User Accounts

Appearance and
Personalization

• **Clock, Language, and Region**

Ease of Access

Date and Time
Set the time and date | Change the time zone | Add clocks for different time zones

Language
Add a language | Change input methods

Region ⑤
Change location | Change date, time, or number formats

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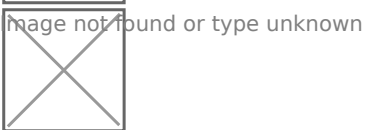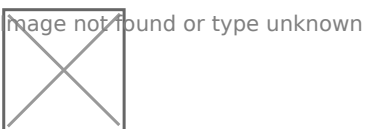

1.2. What to do?

- 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.
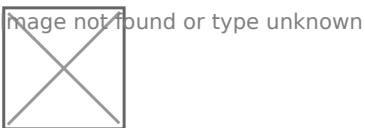
2. How to get there?

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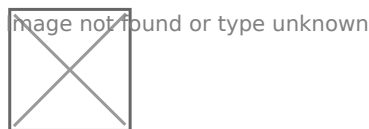
3. What to do?

## 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 8	Employee Import ①	Field Seperator (,); Text Qualifier (None); First row contains field names	comImport_Custom_00508	☐

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

Image not found or type unknown

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

Image not found or type unknown
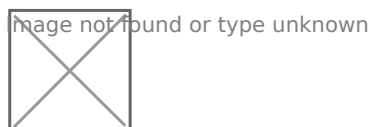
3.2. Create an employee import (.csv) file in Excel

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).

- Create a New Microsoft Excel Worksheet (3).
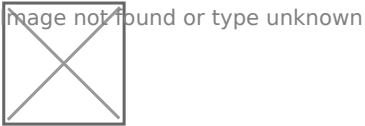
- Open the new work sheet and Paste (4) the entire first row copied above into your new Excel documents First (5) row.
- Enter all the employee data in the mandatory columns.
- These columns are all mandatory:
  - Column A: Employee Number.
  - Column B: Surname.
  - Column C: Full Name.
  - Column O: OrgLevel1_Description.
  - Column BC: Job Title.
  - Column BM: Employment Type Description.
  - Column EL: SchemaID.
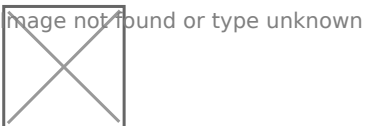
3.2.2. Save the Excel document as a (.csv) file

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).
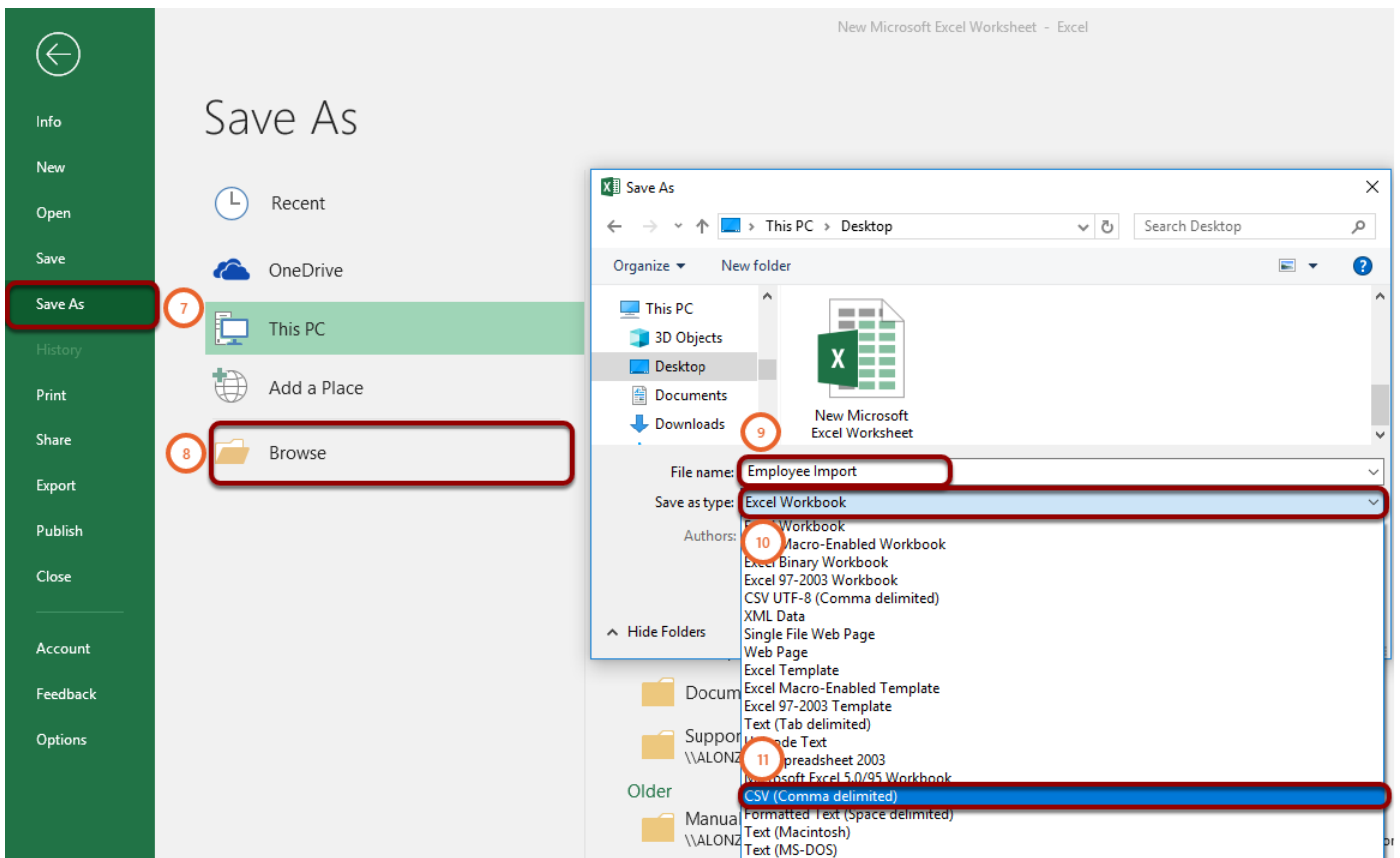- When asked, Do you want to keep using this format, click on yes (12).
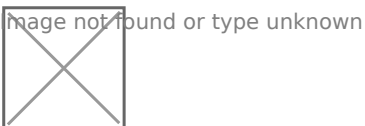
Image not found or type unknown

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.

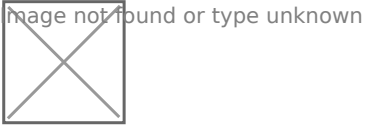| Click here to...	②8	Employee Import ①		Field Seperator (,); Text Qualifier (None); First row contains field names	comImport_Custom_00508	☐

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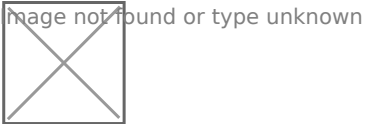

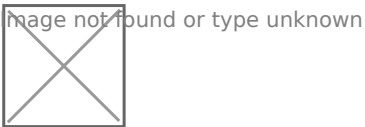Image not found or type unknown

- 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.
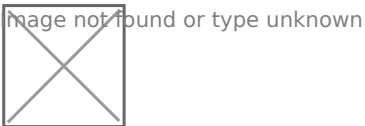- Select that file (2).
- Click on open (3).

- 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

⑦

| 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 <u>Section 2.3.1</u> and insure no errors occur.

Click on this <u>link</u> 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 Seperator (,); 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

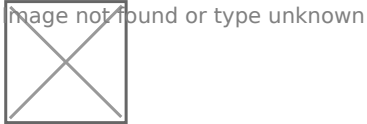- Click on Choose File (4) again and select the employee import file (.csv) that you saved in <u>Section 2.2.2</u>.

- 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).

Image not found or type unknown

- 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.

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).
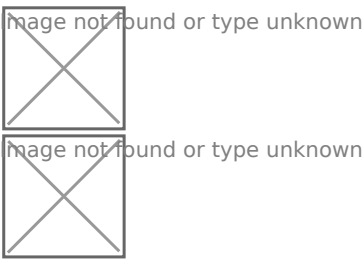
3.4.1.2. What to do?

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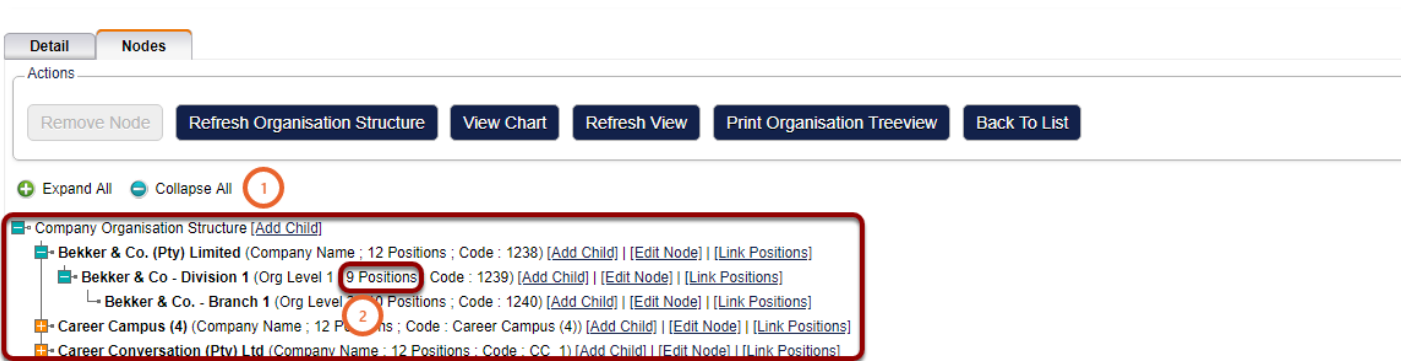
3.4.2. Job Profiler

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).
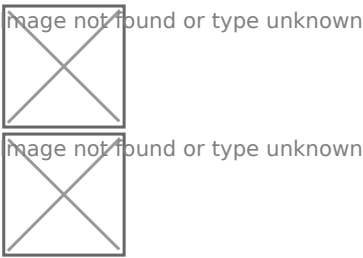
3.4.2.2. What to do

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.

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).

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.

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

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