

# How to Import Employees Using Excel

## 1. Before you start

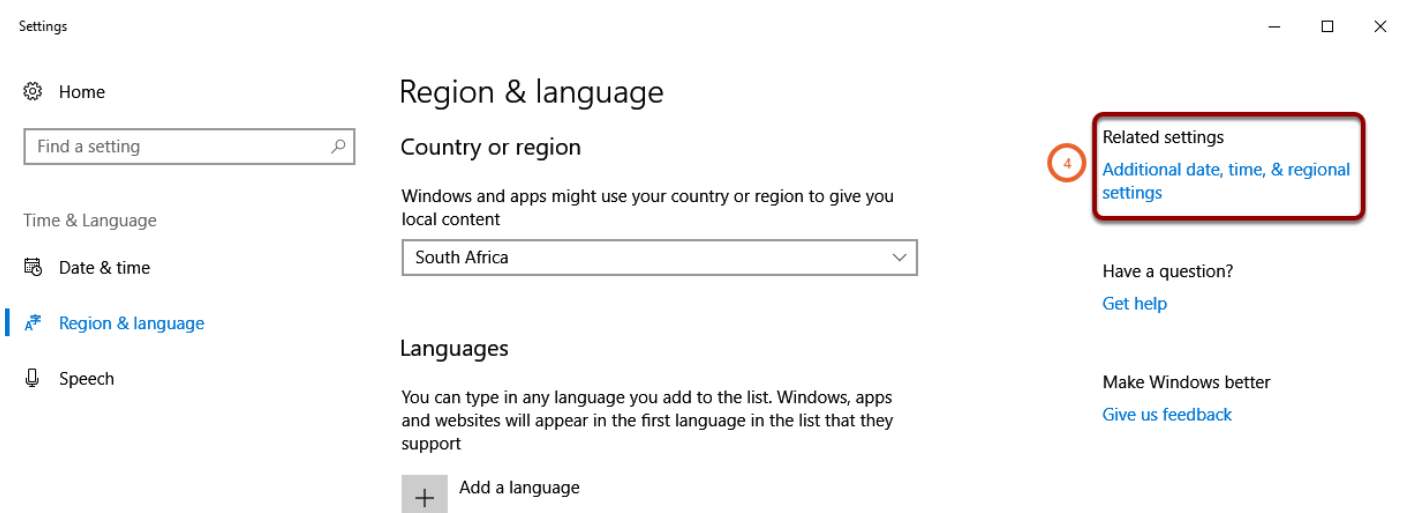
Important: Before you start with this manual ensure that your Region settings are correct, otherwise the Excel (.csv) files will not work correctly.

### 1.1. How to get there?

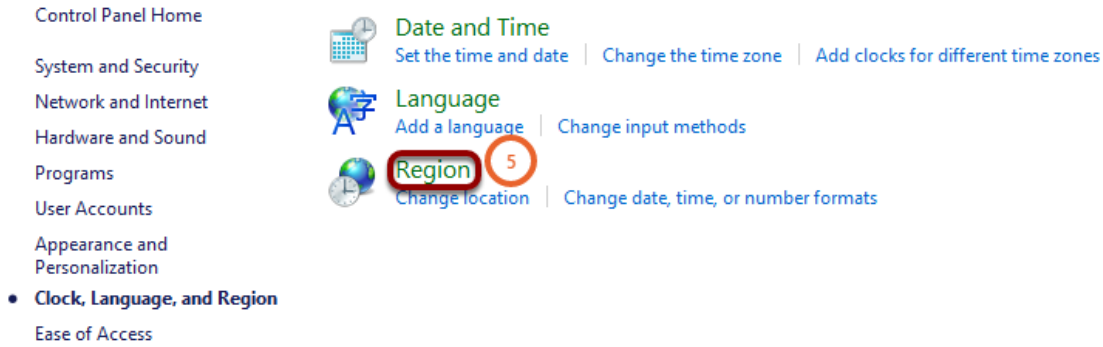
- On your desktop click on Search (1).
- Then type Region & language settings (2).
- Click on Region & language settings (3) or press Enter. A new window will open.



- 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.



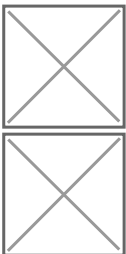
## 1.2. What to do?

- 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?

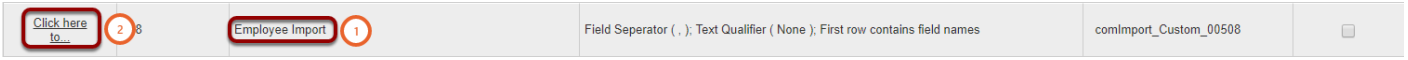
Click on System Administration (1). With your cursor hover over System Administration (2) then click on Import Data (3)



## 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 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

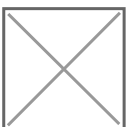
## 3.2.1. Enter the employee data in an Excel document (.xlsx)

- 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' and 'Paste Options...' highlighted. The spreadsheet contains columns for EmployeeSurname, FullName, MaidenNz, KnownAs, Initials, FN, TelNoH, CellNo, Email, EmpTitle, Location, and several OrgLevel columns. The data includes employees like Romelia Batton, Chiquita Griffith, Tom Grana, Ingrid Richie, Tonja Loyd, Filiberto Debose, Stacie Villani, Matt Narron, Richie Radcliffe, and Iris Johnsen.

EmployeeSurname	FullName	MaidenNz	KnownAs	Initials	FN	TelNoH	CellNo	Email	EmpTitle	Location	OrgLevel1	OrgLevel1 Business	Business	OrgLevel2	OrgLevel2 Business	Business	OrgLevel3	OrgLevel3 Business	B
Update01	Batton	Romelia		B				BattonRomelia@mail.com			1_21/12/2	CC Smollan Local 21/12/2016							
Update02	Griffeth	Chiquita		I				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(2)		
8H6YV6	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(2)	
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(2)		
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(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.

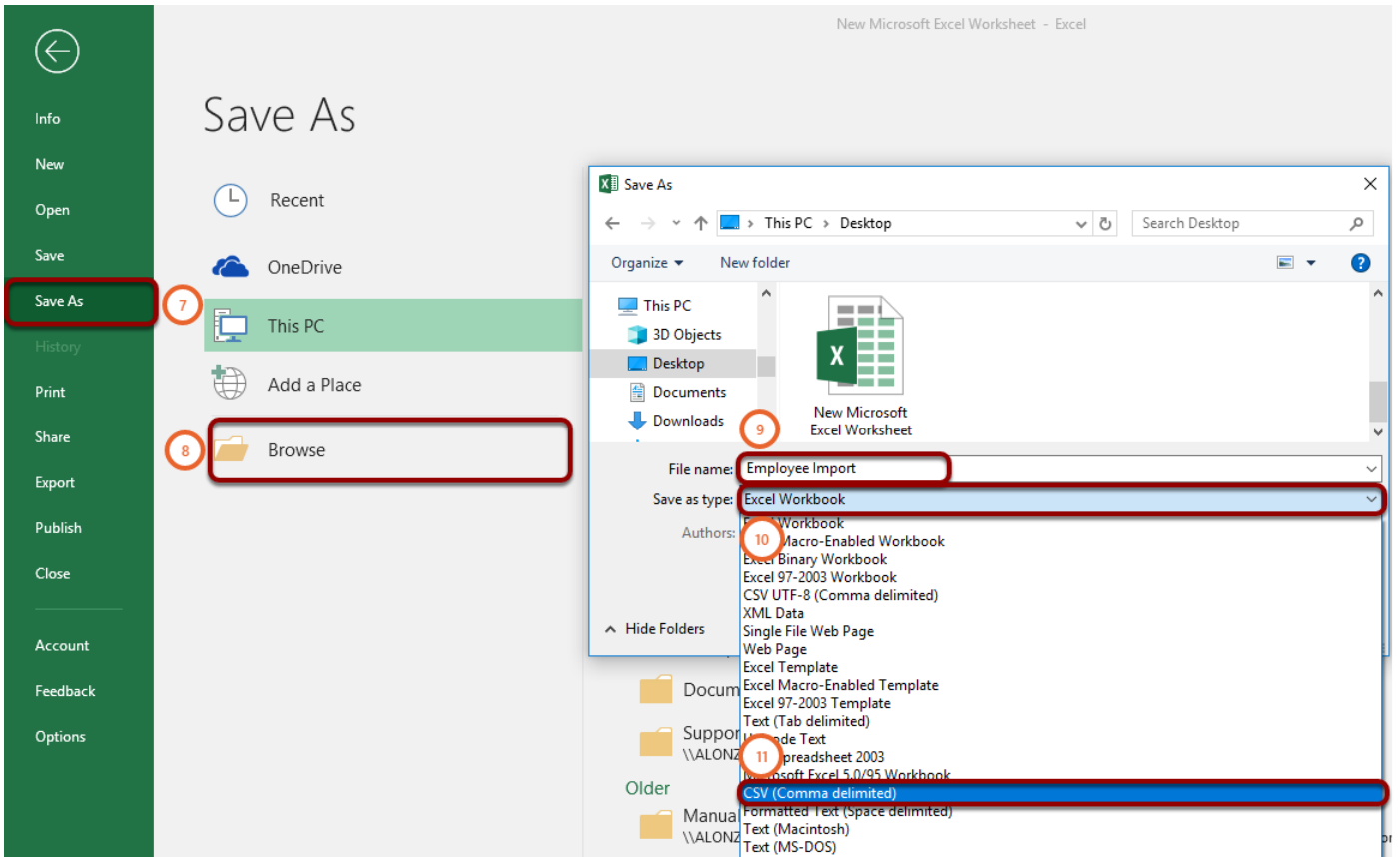


### 3.2.2. Save the Excel document as a (.csv) file

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).



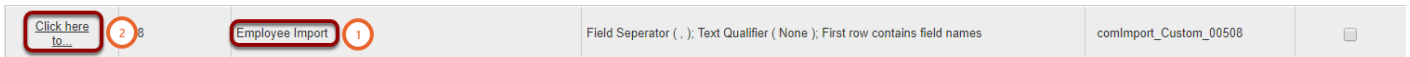


## 3.3. Importing the (.csv) file

### 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.



- 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).

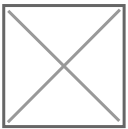


- Click on Save & Preview (4).
- The page will refresh and new options will be available.



- 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

7

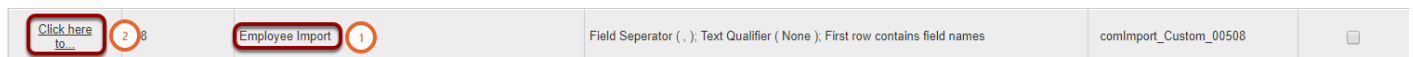
8

## 3.3.2. Execute actual import

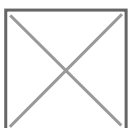
Note: before continuing with this section, first perform a Mock Import in [Section 2.3.1](#) and insure no errors occur.

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

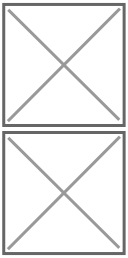
## 3.4. Post Import Validations

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).



### 3.4.1.2. What to do?

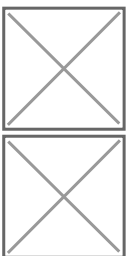
- Ensure that all the node have been created correctly (1).
- Check that the correct number of Positions (2) display.



## 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.

Job Profile List

Job Profile Search

Job Code  3 Job Title  2 Administration Status

Compiler  Lock Status

**Search** Clear Position Search

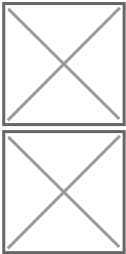
1 Add new Profile View printable version Add new Profile (Quick Add)

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).



### 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 Employees

Administration Master Data

Employee List

Switch Schema

Search Employees 1

Current Employees Previous Employees All

Employee Number Surname Name ID Number

Job Code Position

2 3 Search Clear

Number of Employees in All Employees: 1480

Appoint New Employee Appoint Employee Being Transferred Appoint new Employee (Quick)

Actions	Employee Number	Surname	Name	ID Number	Position	Location in organisation	Schema
4 Action	5	Captain Kurk	Captain	93091350190873	Manager	Company	[4] Orange / Purple

View / Edit

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

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)		<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

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