

# Employee Licence Import

## Licence Record Import

The licence import functionality enables a system administrator to import licence records from the administration portal. The administrator can do a bulk import of licence records that will reflect on the employees' licence dashboards. This will typically be used for temporary or contract workers. The import cannot be used to update current data.

**Path:** System Administration | Import data | Employee Licence Import

### 11.1 Import fields

Accurately populate all the fields in the import file to ensure that the import completes without encountering any errors. The fields are listed below each with a short description.

\*Mandatory/required fields.

<b>Schemald*</b>	The schema on which the employee is appointed and to which the licence must be imported.
<b>EmployeeNumber*</b>	The employee number of employee who must receive the licence.
<b>Licence Section*</b>	This refers to the licence sections on the employee's licence dashboard where the licence will be imported. There are only three valid sections in the database: Public, Ad Hoc and Position.
<b>Licence Type*</b>	<b>Path:</b> Modules   Manage Employees   Master Data   Licence Types You can get the relevant licence type value from the licence definition in the licence definitions catalogue (Path: Manage Employees   Master Data   Licence definitions). The licence type should exist in the licence types library and should also be linked to the licence definition of the licence that you want to import.

<b>Licence Name*</b>	<b>Path:</b> Modules   Manage Employees   Master Data   Licence definitions The licence should exist in the licence definition catalogue and the licence name in the import file should be an exact match to the licence definition title.
<b>Start Date*</b>	The start date of the licence.
<b>End Date*</b>	The expiry date of the licence.
<b>Licence Number</b>	
<ul style="list-style-type: none"> <li>• <b>Licence Code*</b> <i>Only public licences</i></li> </ul>	<b>Path:</b> Modules   Manage Employees   Master Data   Licence Code Only mandatory when importing public licences. The code should exist in the licence code library and the import file should only be populated with B, C, C1, EC etc.
<b>Mine Licence Number</b>	Unique Code provided.
<b>Is International Licence</b>	A 'Yes' or 'No' option.
<b>Place of Issue</b>	The location where the licence was issued.
<b>Comments</b>	General comments to be loaded against the licence.
<b>Last Collection Date</b>	The last issue date of the licence.
<b>Last Printed Date</b>	The date when the licence was last printed and provided to the employee.
<b>First Issue Date</b>	The initial date when the licence was first issued.
<b>Primary Approver</b>	The engineer serving as the primary approver for the licence on the date of issue.
<b>Document Name 1 - 10</b>	The unique document name with extension of the document e.g. document.jpeg.
<b>Document Description 1-10</b>	The description to be displayed on the document list.

## 11.2 Importing licences into the different sections

### 11.2.1 Public

- A public licence can only be imported for an employee if it has not been added to the employee's licence dashboard yet. No duplicate records will be created.
- Licence section = Public.
- It is mandatory to populate the licence code.

## 11.2.2 Ad Hoc

- An ad Hoc licence can only be imported for an employee if it does not already exist in the ad hoc or the current job/position requirements section of the employee's licence dashboard.
- Licence section = Ad Hoc.

## 11.2.3 Position

- A position licence can only be imported for an employee if it is linked to the employee's current job/position requirements in Job Profiler and,
- If a licence record does not already exist for the licence you want to import.
- Licence section = Position.

# 11.3 Flag imported data (Excluded from processing)

**Path:** System Administration | Tools | Configuration | Framework | Configuration Settings | Human Resources | Licences

This functionality includes an optional setting to flag imported data, the setting can be enabled/disabled per schema. The flag indicates that no processing/validation will be done on the imported records until they reach their expiry date or meet all the requirements. This will only apply to ad-hoc and current job/position licences.



Figure 50: Licence import configuration setting

- When configuration setting 'Exclude all imported licences from being processed, ...' is ENABLED, all imported licences will be flagged 'Excluded from processing' = TRUE.
- When configuration setting 'Exclude all imported licences from being processed, ...' is DISABLED, all imported licences will be flagged 'Excluded from processing' = FALSE.

## 11.4 Document server link

The licence import allows for the import of a local document server link, up to ten documents with a corresponding description. The document itself is uploaded to the file server directly and the corresponding name is then used to dynamically generate the download link for each document. This functionality is optional when importing licence records.

## 11.5 Import validations

Several validations have been implemented to ensure that only valid data can be imported to the system. The following validations are included in the validation script:

- All required fields have been supplied.
- No duplicate records.
- The employee exists in the database.
- The start date or end date is valid dates.
- The licence sections exist in the database.
- The licence types exist in the database.
- The licence definition exists in the database.
- The position type licence is required by the employee's active position.
- The licence definition exists in the database.
- The employee licence does not already exist for employee.
- The employee position does not require the ad hoc licence.
- The public licence has a valid licence code.
- The Last Printed and Last Collected Date is either empty or has a valid date.
- The first issue date is a valid date when provided.
- The primary approver exists in the system, when provided.
- The existence of the document in the document table.
- The system is configured in FilesServer mode and the FilesServer is setup when Document Name is provided.
- When a document description is provided, the document name is also provided.
- Valid document name for use in a URL.

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