



IMPORT DATA INTO EMPLOYEE TRAINING MANAGER

March 2017

Description

This document describes how to import your employee, course and competency data into Employee Training Manager, a desktop software application that allows you to track your employees or personnel training, events and competencies

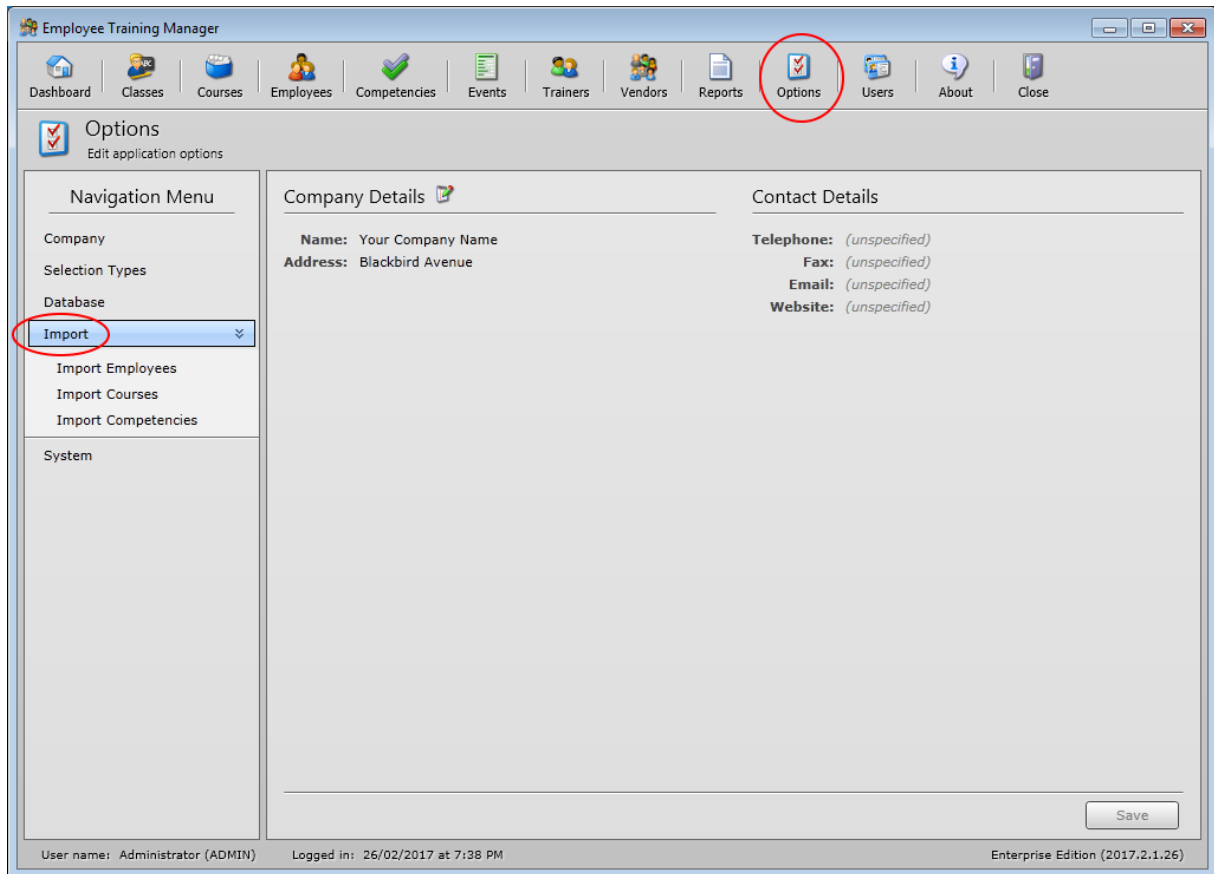
Smart Company Software
support@smartcompanysoftware.com

Importing Data

Understandably you may have some data that you wish to import into Employee Training Manager.

We currently support importing **Employee**, **Course** and **Competency** data.

To import data, select the **Options** menu and then select the **Import** menu item from the Navigation menu. You will see the import options available.



Importing Employee Data

There are 3 steps to importing your employee data:

1. Download the employee template file
2. Copy your employee data into the template
3. Import the employee data

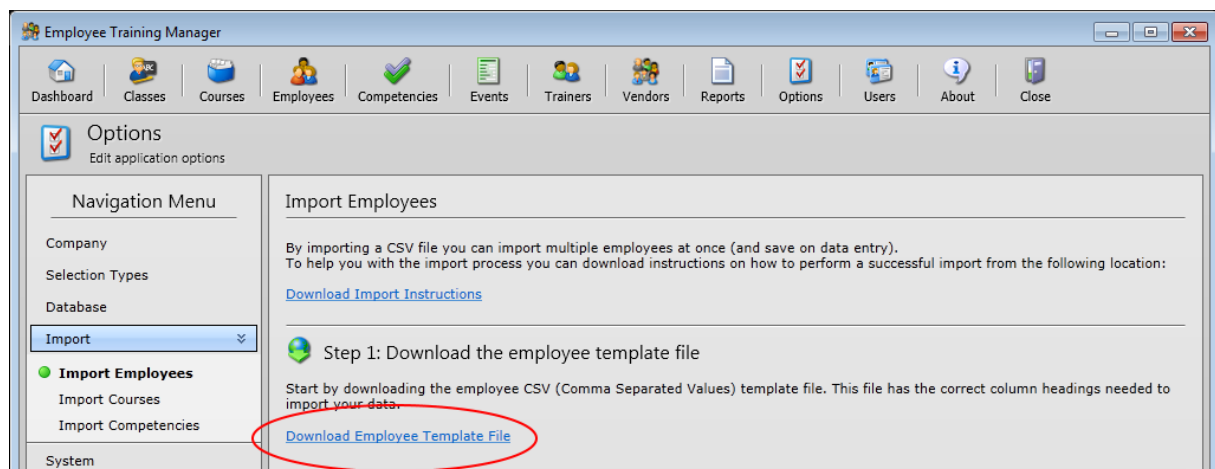
You must follow these steps to ensure a successful import of your data.

It is **strongly** advised that you take a backup of your database before you continue. If you encounter a problem with the import you will need to go back, correct the file and start again. Some of the records may have successfully imported, so to avoid duplication you need to reset the database back to the state before the import process started and you can do this by taking a backup which you can later restore.

If you haven't done so, please perform a backup **now**.

1) Download the employee template file

We have created an import template file that you can download by clicking the **Download Employee Template File** link on the import employee's screen.



The template is a CSV (comma-separated values) file. This is a file format used to store tabular data in which numbers and text are stored in plain textual form that can be read in an application such as Microsoft Excel. Lines in the template file represent rows of a table, and commas in a line separate the columns in the table rows.

It is recommended you open the template CSV file in Microsoft Excel.

The template file contains the format in which you should enter your employee data. The template file contains some sample data in the file to provide an example how the template should be populated.

*FirstName	*LastName	DateOfBirth	IsMale	Division	Department	Team	Shift	EmployeeNumber	PrimaryJobRole	SecondaryJobRole	Telephone	Extension	Cell	Mobile	Email	IsExcludedTraining	DateEmployed	Classification	Location	CostCentre
Roger	Bannister	1/06/1970	TRUE	New York	Accounts	Team A	Day	334	Debt Collection		555-555-556	100	555-333-124		roger.bannister@emailaddress.com	FALSE		Full-Time		ABC123
Fred	Blogs	1/06/1971	TRUE	New York	Marketing	Team A	Day	335	Graphic Designer		555-555-557	101	555-333-744		fred.blogs@emailaddress.com	FALSE		Full-Time		ABC123
David	Jones	1/02/1969	TRUE	New York	Warehouse	Team B	Day	336	Fork Lift Driver		555-555-559	102	555-333-344		david.jones@emailaddress.com	FALSE		Full-Time		ABC123
Roger	Smith	1/06/1990	TRUE	Chicago	Accounts	Team A	Day	337	Accountant		555-555-565	103	555-333-475		roger.smith@emailaddress.com	FALSE		Full-Time		ABC123
Peter	Jones	1/03/1981	TRUE	Los Angeles	Purchasing	Team D	Day	401	Assistant Buyer		555-555-545	104	555-333-421		peter.jones@emailaddress.com	FALSE		Full-Time		ABC123
Gary	Jacobs	1/06/1975	TRUE	Atlanta	Sales	Team E	Day		Sales Lead		210	555-555-535	105	555-333-454	gary.jacobs@emailaddress.com	FALSE		Full-Time		ABC123
Sarah	Queen	1/05/1982	FALSE	Los Angeles	Purchasing	Team D	Day	410	Buyer		555-555-525	106	555-333-444		sarah.queen@emailaddress.com	FALSE		Part-Time		ABC123

2) Copy your employee data into the template

You are now ready to enter your data in to the template file. The first row in the spreadsheet contains the column names. Columns that have an asterisk (*) next to the column name indicates the column is mandatory and data must be entered. If no asterisk is next to the column name you can leave the data cell blank, otherwise you can put any relevant data in the data cell.

Do not change the names of the column names in the first row, or delete the row.

Field	Type and Max	Description
*FirstName	Text (100)	First name of employee
*LastName	Text (100)	Last name of employee
DateOfBirth	Date	Date of birth
IsMale	True/False	True for male or false for female
Division	Text (100)	Division the employee belongs to
Department	Text (100)	Department the employee belongs to
Team	Text (100)	Team the employee belongs to
Shift	Text (100)	Shift the employee works i.e. day, night
EmployeeNumber	Text (50)	Employee number
PrimaryJobRole	Text (100)	Primary job role of the employee
SecondaryJobRole	Text (100)	Secondary job role of the employee
Telephone	Text (50)	Telephone number
Extension	Text (20)	Telephone number extension
Cell/Mobile	Text (50)	Cell/Mobile telephone number
Email	Text (100)	Email address
IsExcludedTraining	True/False	True if the employee is excluded from training
DateEmployed	Date	Date employed
Classification	Text (100)	Classification of the employee i.e. full-time. Part-time
Location	Text (255)	Location where the employee works
CostCentre	Text (100)	Cost centre for the employee
MaritalStatus	Text (100)	Marital status of the employee
Religion	Text (100)	Religion of the employee
Language	Text (100)	Primary language of the employee
EthnicOrigin	Text (100)	Ethnic origin of the employee

3) Import the employee data

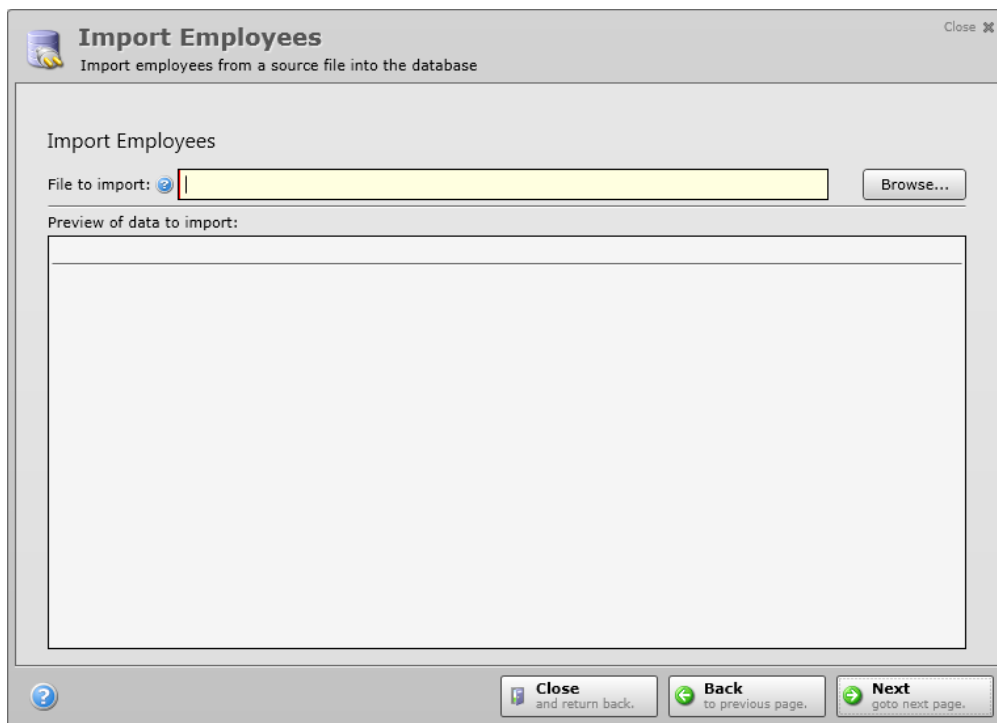
Once you have populated the data into the template you are ready to import your data into the database. To start, click the **Import Employees** button.

You will be presented with a dialog confirming you are about to start the import process. You will also see a reminder about performing a backup of the database.

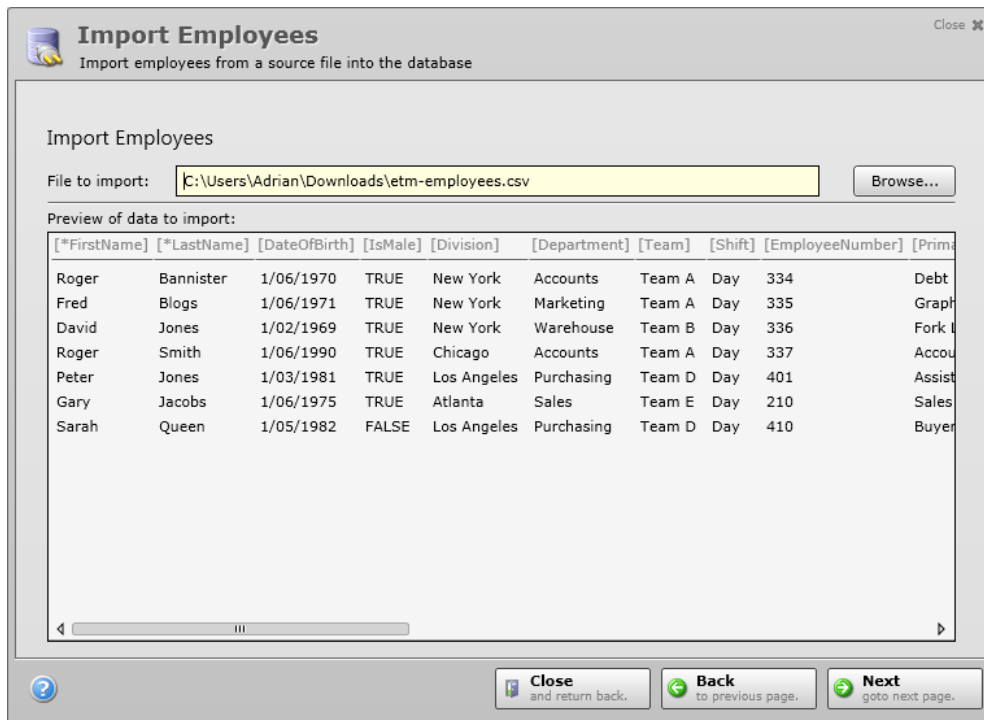


To proceed with the import, click the **Next** button.

You now need to select the CSV file that contains your employee data to import. Click the **Browse** button to locate and select the CSV file. Once you have located the file, click the **Open** button. The path and file selected will be shown.



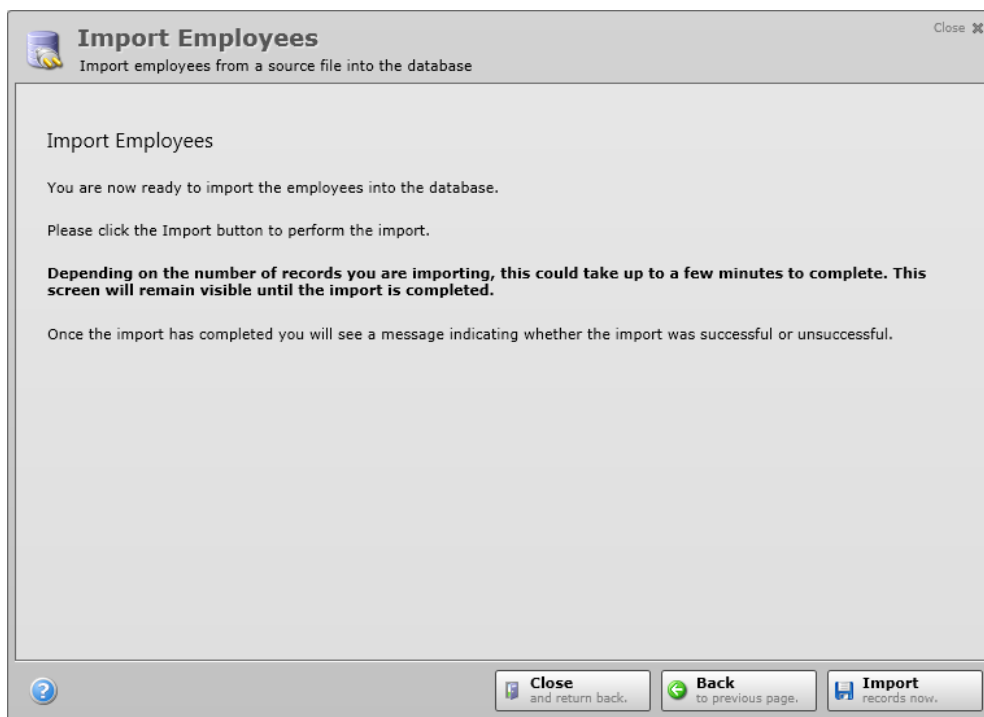
A preview of the data is also displayed so you can check that the data looks correct. It is recommended you review the data before proceeding. Pay attention to the column names and the data in each column to make sure it matches what you expect to see.



If you identify a problem, correct the template file in Microsoft Excel, save it and open the file again using the **Browse** button to update the preview.

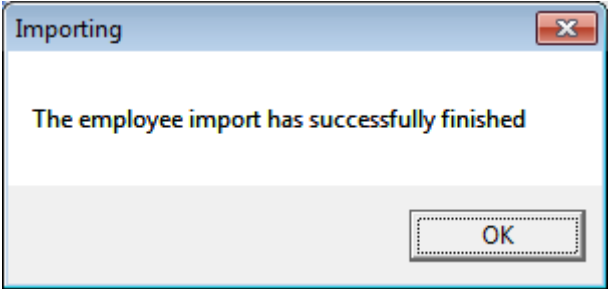
Once you are satisfied the data is correct, click the **Next** button.

You are now ready to import the data. Click the **Import Records Now** button to begin the import process. This may take a few minutes depending on how much data you are importing.



If you encounter an error message you will need to check the import file to identify the problem.

Once the data imports successfully you will see the following message:



Go to the employee search screen and all the records you have imported will be displayed. It is very important that you check the data before you proceed to use the software.

Importing Course Data

There are 3 steps to importing your course data:

4. Download the course template file
5. Copy your course data into the template
6. Import the course data

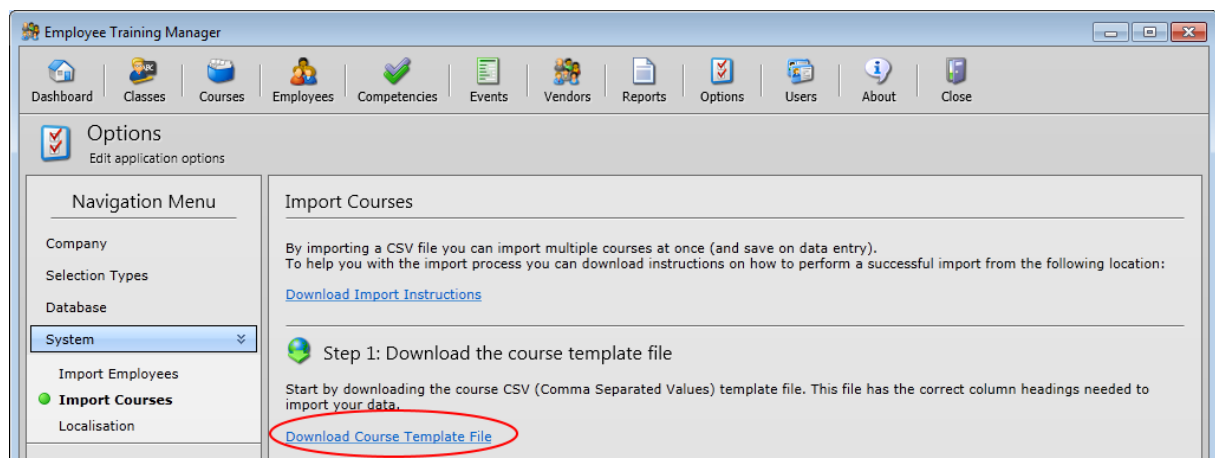
You must follow these steps to ensure a successful import of your data.

It is **strongly** advised that you take a backup of your database before you continue. If you encounter a problem with the import you will need to go back, correct the file and start again. Some of the records may have successfully imported, so to avoid duplication you need to reset the database back to the state before the import process started and you can do this by taking a backup which you can later restore.

If you haven't done so, please perform a backup **now**.

1) Download the course template file

We have created an import template file that you can download by clicking the **Download Course Template File** link on the import course's screen.



The template is a CSV (comma-separated values) file. This is a file format used to store tabular data in which numbers and text are stored in plain textual form that can be read in an application such as Microsoft Excel. Lines in the template file represent rows of a table, and commas in a line separate the columns in the table rows.

It is recommended you open the template CSV file in Microsoft Excel.

The template file contains the format in which you should enter your course data. The template file contains some sample data in the file to provide an example how the template should be populated.

*FirstName	*LastName	DateOfBirth	IsMale	Division	Department	Team	Shift	EmployeeNumber	PrimaryJobRole	SecondaryJobRole	Telephone	Extension Cell	Email	IsExcluded	DateEmpl	Classification	Location	CostCentre
Roger	Bannister	1/06/1970	TRUE	New York	Accounts	Team A	Day	334	Debt Collection		555-555-556	100 555-333-124	roger.bannister@emailaddress.com	FALSE		Full-Time	ABC123	
Fred	Blogs	1/06/1971	TRUE	New York	Marketing	Team A	Day	335	Graphic Designer		555-555-557	101 555-333-744	fred.blogs@emailaddress.com	FALSE		Full-Time	ABC123	
David	Jones	1/02/1969	TRUE	New York	Warehouse	Team B	Day	336	Fork Lift Driver		555-555-559	102 555-333-344	david.jones@emailaddress.com	FALSE		Full-Time	ABC123	
Roger	Smith	1/06/1990	TRUE	Chicago	Accounts	Team A	Day	337	Accountant		555-555-565	103 555-333-475	roger.smith@emailaddress.com	FALSE		Full-Time	ABC123	
Peter	Jones	1/03/1981	TRUE	Los Angeles	Purchasing	Team D	Day	401	Assistant Buyer		555-555-545	104 555-333-421	peter.jones@emailaddress.com	FALSE		Full-Time	ABC123	
Gary	Jacobs	1/06/1975	TRUE	Atlanta	Sales	Team E	Day		Sales Lead		210 555-555-535	105 555-333-454	gary.jacobs@emailaddress.com	FALSE		Full-Time	ABC123	
Sarah	Queen	1/05/1982	FALSE	Los Angeles	Purchasing	Team D	Day	410	Buyer		555-555-525	106 555-333-444	sarah.queen@emailaddress.com	FALSE		Part-Time	ABC123	

2) Copy your course data into the template

You are now ready to enter your data in to the template file. The first row in the spreadsheet contains the column names. Columns that have an asterisk (*) next to the column name indicates the column is mandatory and data must be entered. If no asterisk is next to the column name you can leave the data cell blank, otherwise you can put any relevant data in the data cell.

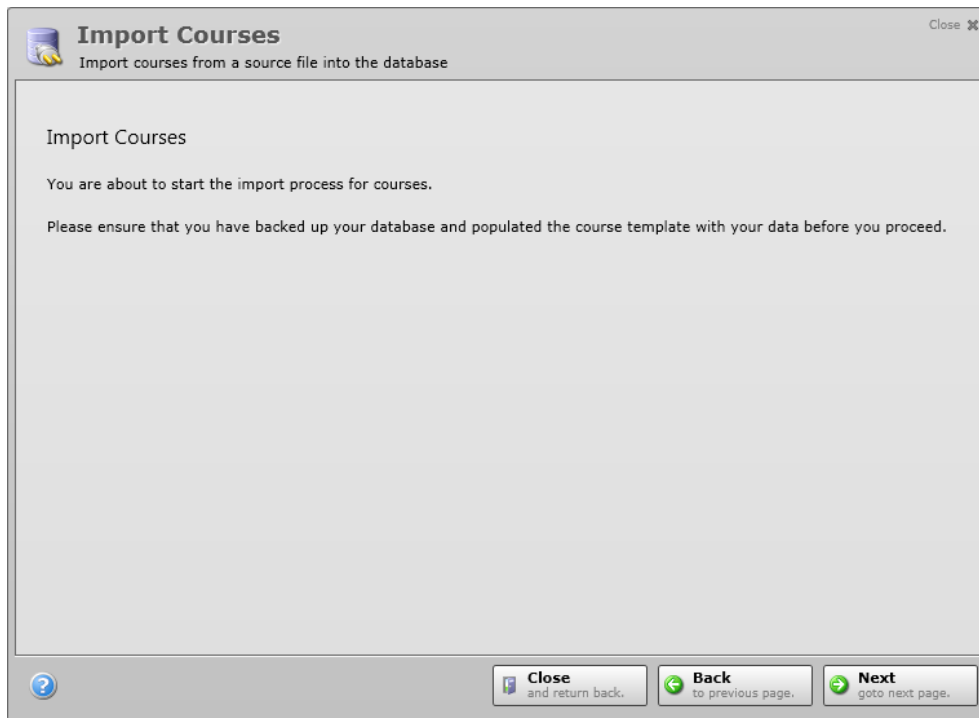
Do not change the names of the column names in the first row, or delete the row.

Field	Type and Max	Description
*Title	Text (100)	Title of the course
Description	Text (100)	Description of the course
Code	Date	Short code to identify the course
Category	True/False	Category for the course
Credits	Text (100)	Number of credits associated with the course
Location	Text (100)	Location where the course takes place
Medium	Text (100)	Medium in which the course is delivered
IsExamRequired	True/False	True if the course requires an exam
IsAccredited	True/False	True if the course is an accredited course

3) Import the course data

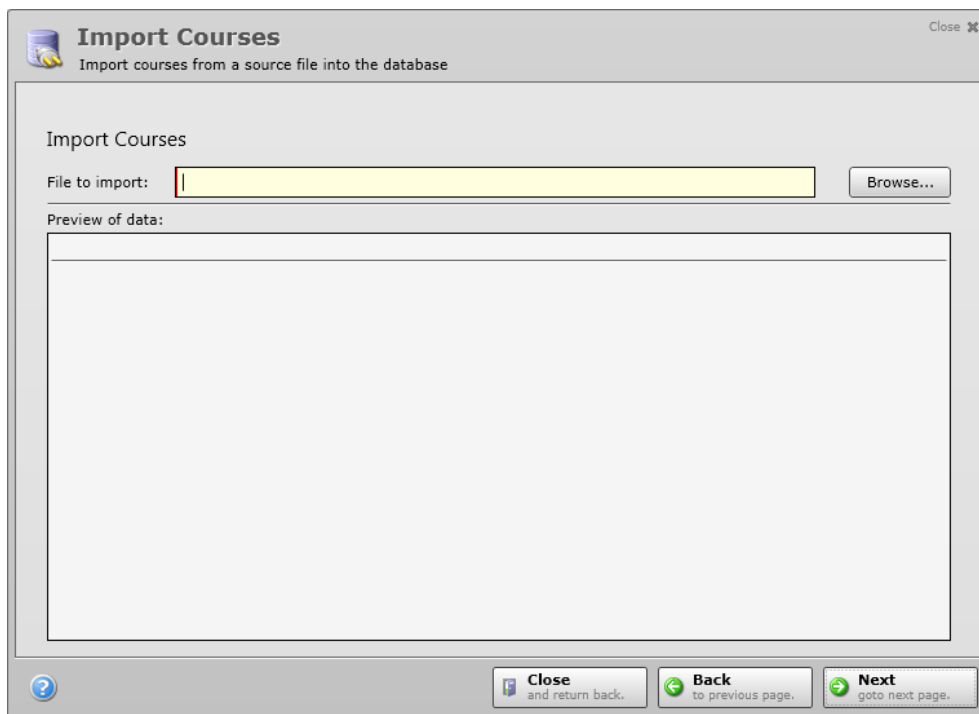
Once you have populated the data into the template you are ready to import your data into the database. To start, click the **Import Courses** button.

You will be presented with a dialog confirming you are about to start the import process. You will also see a reminder about performing a backup of the database.

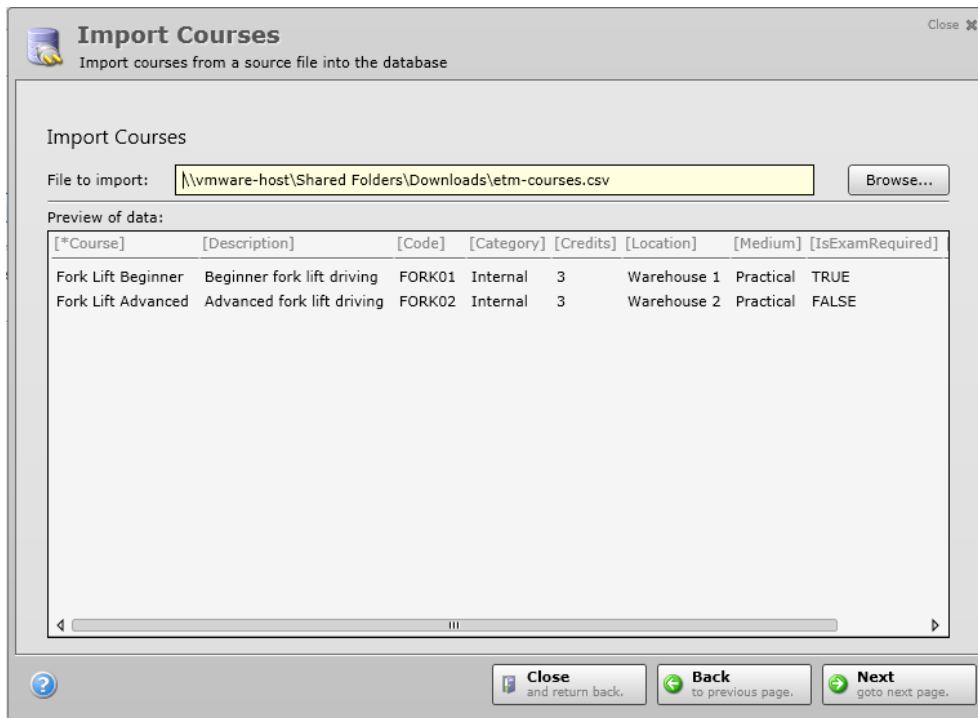


To proceed with the import, click the **Next** button.

You now need to select the CSV file that contains your course data to import. Click the **Browse** button to locate and select the CSV file. Once you have located the file, click the **Open** button. The path and file selected will be shown.



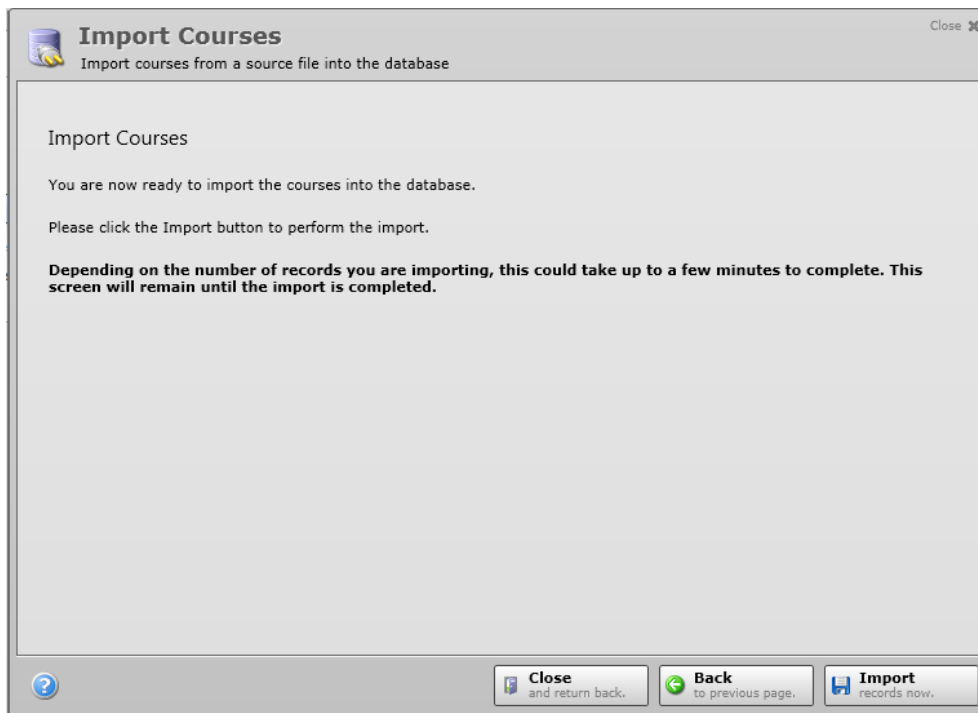
A preview of the data is also displayed so you can check that the data looks correct. It is recommended you review the data before proceeding. Pay attention to the column names and the data in each column to make sure it matches what you expect to see.



If you identify a problem, correct the template file in Microsoft Excel, save it and open the file again using the **Browse** button to update the preview.

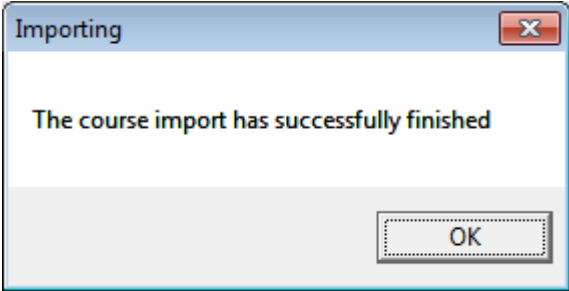
Once you are satisfied the data is correct, click the **Next** button.

You are now ready to import the data. Click the **Import Records Now** button to begin the import process. This may take a few minutes depending on how much data you are importing.



If you encounter an error message you will need to check the import file to identify the problem.

Once the data imports successfully you will see the following message:



Go to the course screen and all the records you have imported will be displayed. It is very important that you check the data before you proceed to use the software.

Importing Competency Data

There are 3 steps to importing your competency data:

1. Download the competency template file
2. Copy your competency data into the template
3. Import the competency data

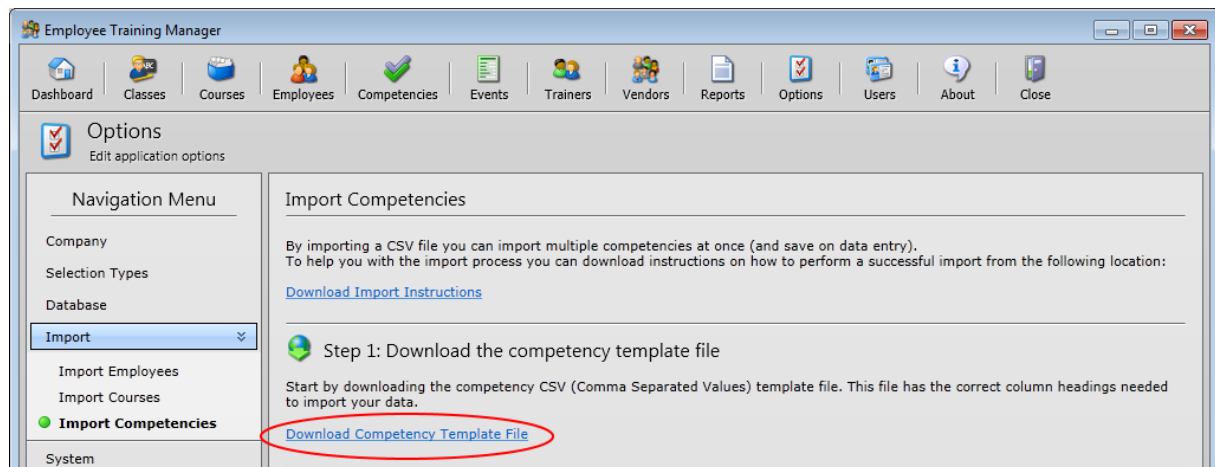
You must follow these steps to ensure a successful import of your data.

It is **strongly** advised that you take a backup of your database before you continue. If you encounter a problem with the import you will need to go back, correct the file and start again. Some of the records may have successfully imported, so to avoid duplication you need to reset the database back to the state before the import process started and you can do this by taking a backup which you can later restore.

If you haven't done so, please perform a backup **now**.

1) Download the competency template file

We have created an import template file that you can download by clicking the **Download Competency Template File** link on the import course's screen.



The template is a CSV (comma-separated values) file. This is a file format used to store tabular data in which numbers and text are stored in plain textual form that can be read in an application such as Microsoft Excel. Lines in the template file represent rows of a table, and commas in a line separate the columns in the table rows.

It is recommended you open the template CSV file in Microsoft Excel.

The template file contains the format in which you should enter your course data. The template file contains some sample data in the file to provide an example how the template should be populated.

*First Name	*Last Name	Date of Birth	Is Male	Division	Department	Team	Shift	Employee Number	Primary Job Role	Secondary Job Role	Telephone	Extension Cell	Email	Is Excluded	Date of Employment	Classification	Location	Cost Centre
Roger	Bannister	1/06/1970	TRUE	New York	Accounts	Team A	Day	334	Debt Collection		555-555-556	100 555-333-124	roger.bannister@emailaddress.com	FALSE		Full-Time	ABC123	
Fred	Blogs	1/06/1971	TRUE	New York	Marketing	Team A	Day	335	Graphic Designer		555-555-557	101 555-333-744	fred.blogs@emailaddress.com	FALSE		Full-Time	ABC123	
David	Jones	1/02/1969	TRUE	New York	Warehouse	Team B	Day	336	Fork Lift Driver		555-555-559	102 555-333-344	david.jones@emailaddress.com	FALSE		Full-Time	ABC123	
Roger	Smith	1/06/1990	TRUE	Chicago	Accounts	Team A	Day	337	Accountant		555-555-565	103 555-333-475	roger.smith@emailaddress.com	FALSE		Full-Time	ABC123	
Peter	Jones	1/03/1981	TRUE	Los Angeles	Purchasing	Team D	Day	401	Assistant Buyer		555-555-545	104 555-333-421	peter.jones@emailaddress.com	FALSE		Full-Time	ABC123	
Gary	Jacobs	1/06/1975	TRUE	Atlanta	Sales	Team E	Day		Sales Lead		210 555-555-535	105 555-333-454	gary.jacobs@emailaddress.com	FALSE		Full-Time	ABC123	
Sarah	Queen	1/05/1982	FALSE	Los Angeles	Purchasing	Team D	Day	410	Buyer		555-555-525	106 555-333-444	sarah.queen@emailaddress.com	FALSE		Part-Time	ABC123	

2) Copy your competency data into the template

You are now ready to enter your data in to the template file. The first row in the spreadsheet contains the column names. Columns that have an asterisk (*) next to the column name indicates the column is mandatory and data must be entered. If no asterisk is next to the column name you can leave the data cell blank, otherwise you can put any relevant data in the data cell.

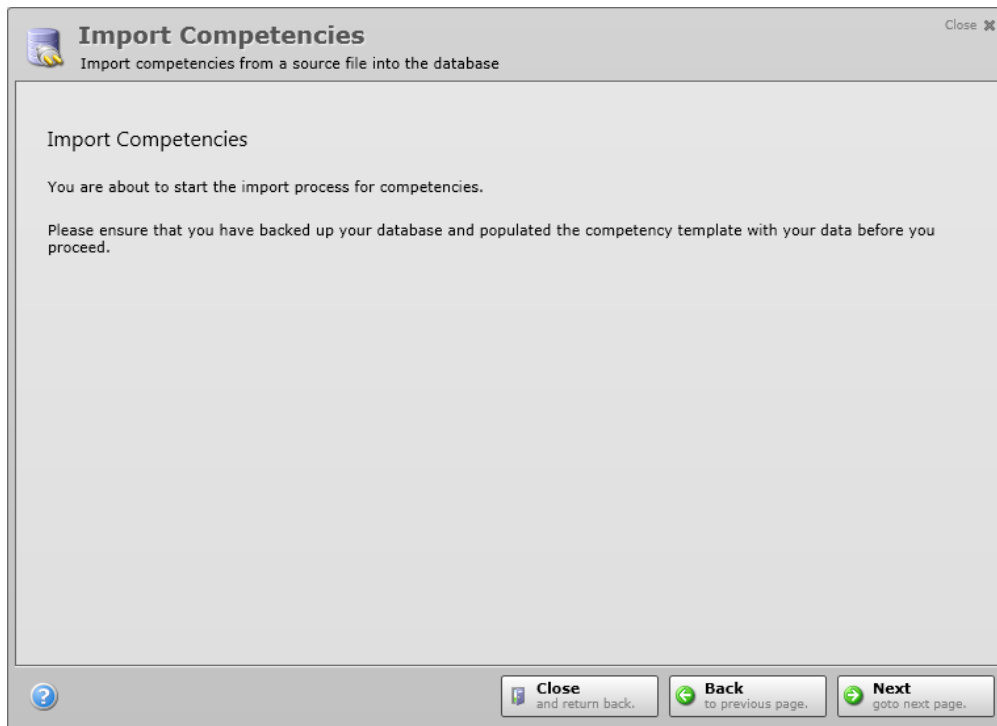
Do not change the names of the column names in the first row, or delete the row.

Field	Type and Max	Description
*Competency	Text (100)	Title of the competency
Description	Text (100)	Description of the competency
TrainerFirstName	Text (100)	Trainer's first name
TrainerLastName	Text (100)	Trainer's last name
Location	Text (100)	Location where the course takes place
Medium	Text (100)	Medium in which the course is delivered
IsAccredited	True/False	True if the course is an accredited course

3) Import the competency data

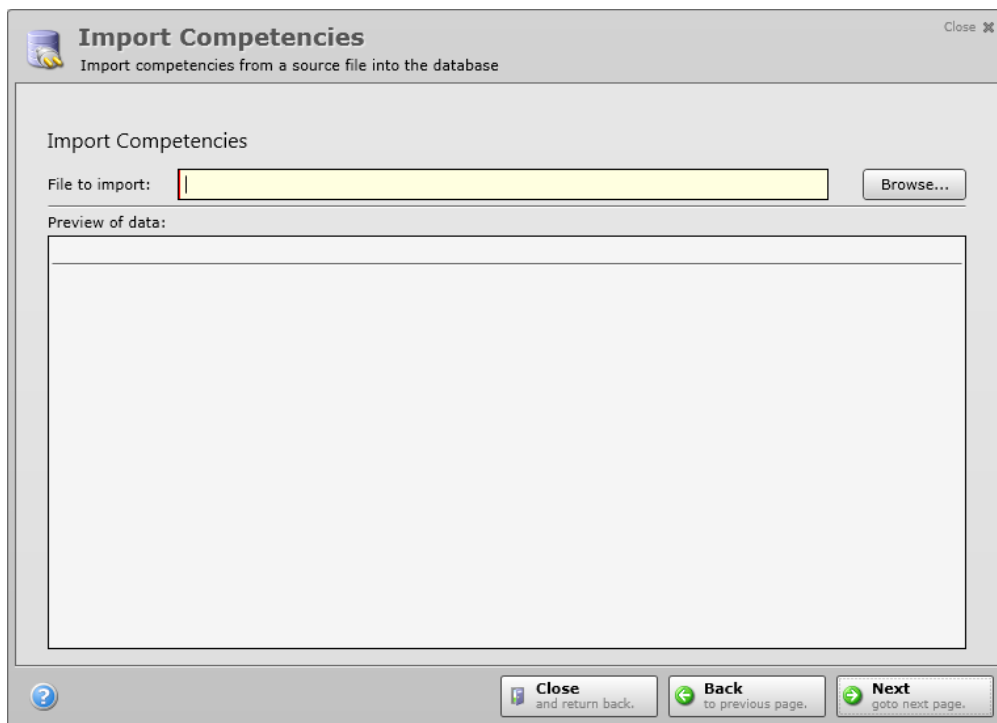
Once you have populated the data into the template you are ready to import your data into the database. To start, click the **Import Competencies** button.

You will be presented with a dialog confirming you are about to start the import process. You will also see a reminder about performing a backup of the database.

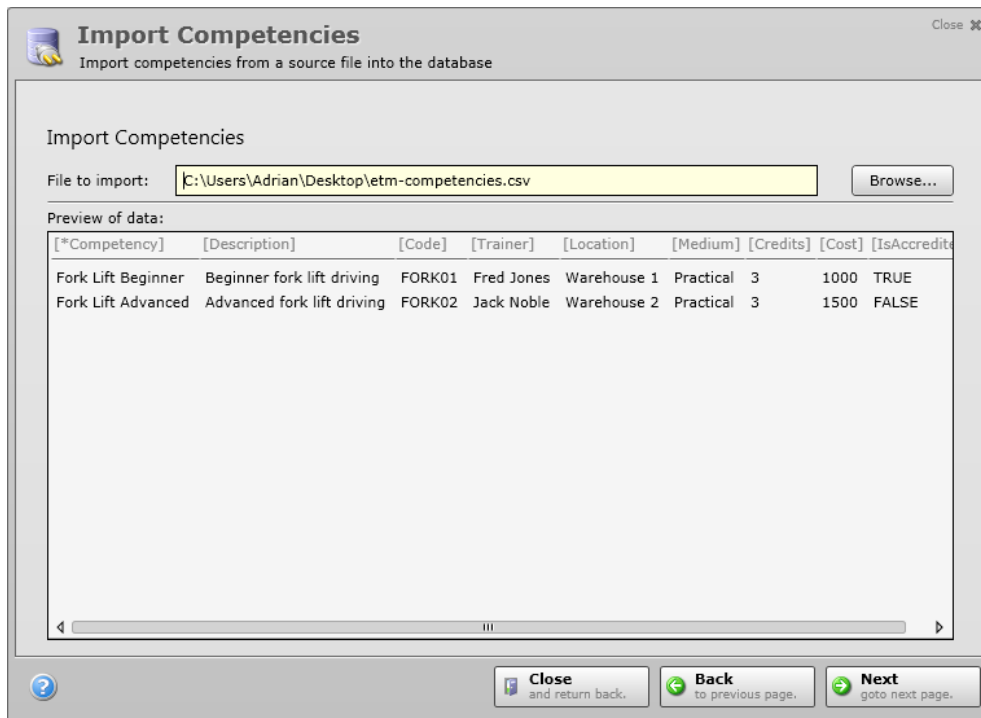


To proceed with the import, click the **Next** button.

You now need to select the CSV file that contains your course data to import. Click the **Browse** button to locate and select the CSV file. Once you have located the file, click the **Open** button. The path and file selected will be shown.



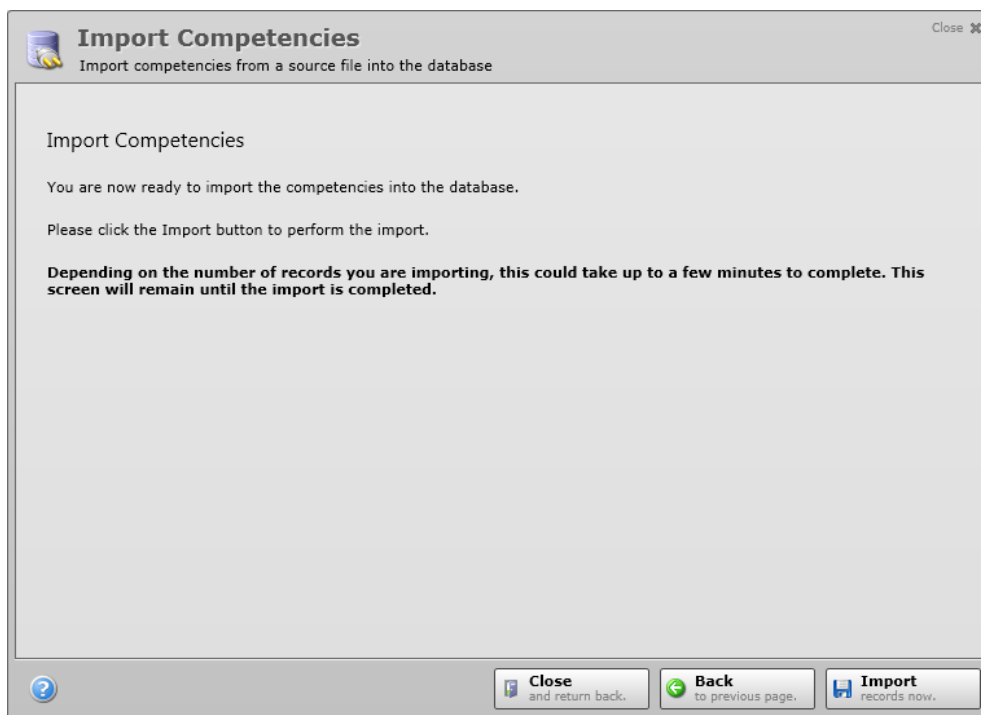
A preview of the data is also displayed so you can check that the data looks correct. It is recommended you review the data before proceeding. Pay attention to the column names and the data in each column to make sure it matches what you expect to see.



If you identify a problem, correct the template file in Microsoft Excel, save it and open the file again using the **Browse** button to update the preview.

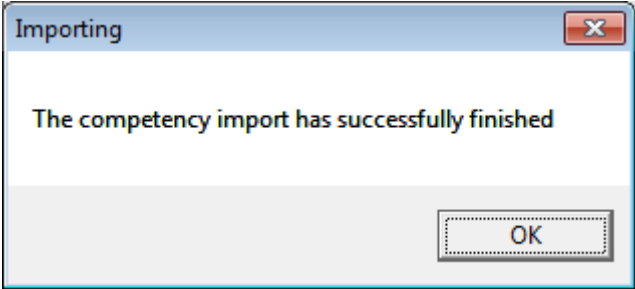
Once you are satisfied the data is correct, click the **Next** button.

You are now ready to import the data. Click the **Import Records Now** button to begin the import process. This may take a few minutes depending on how much data you are importing.



If you encounter an error message you will need to check the import file to identify the problem.

Once the data imports successfully you will see the following message:



Go to the competency screen and all the records you have imported will be displayed. It is very important that you check the data before you proceed to use the software.

What If Something Goes Wrong?

If you encounter an error message you will need to check the import file to identify the problem.

Some things to check for that may have caused the error:

- Have you changed one of the template column header names?
- Have you deleted the first row containing the column names?
- Have you populated the mandatory fields (shown with an asterisk)?
- Have you entered the correct data in a date cell?

If you are unable to resolve the issue you can email us on support@smartcompanysoftware.com and we can help diagnose what the problem is with the file.

If you did encounter an error and you have corrected the import template, you will need to restore the database you previously backed up so you are starting again from same point.