



IMPORTING DATA INTO EMPLOYEE TRAINING MANAGER

January 2018

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

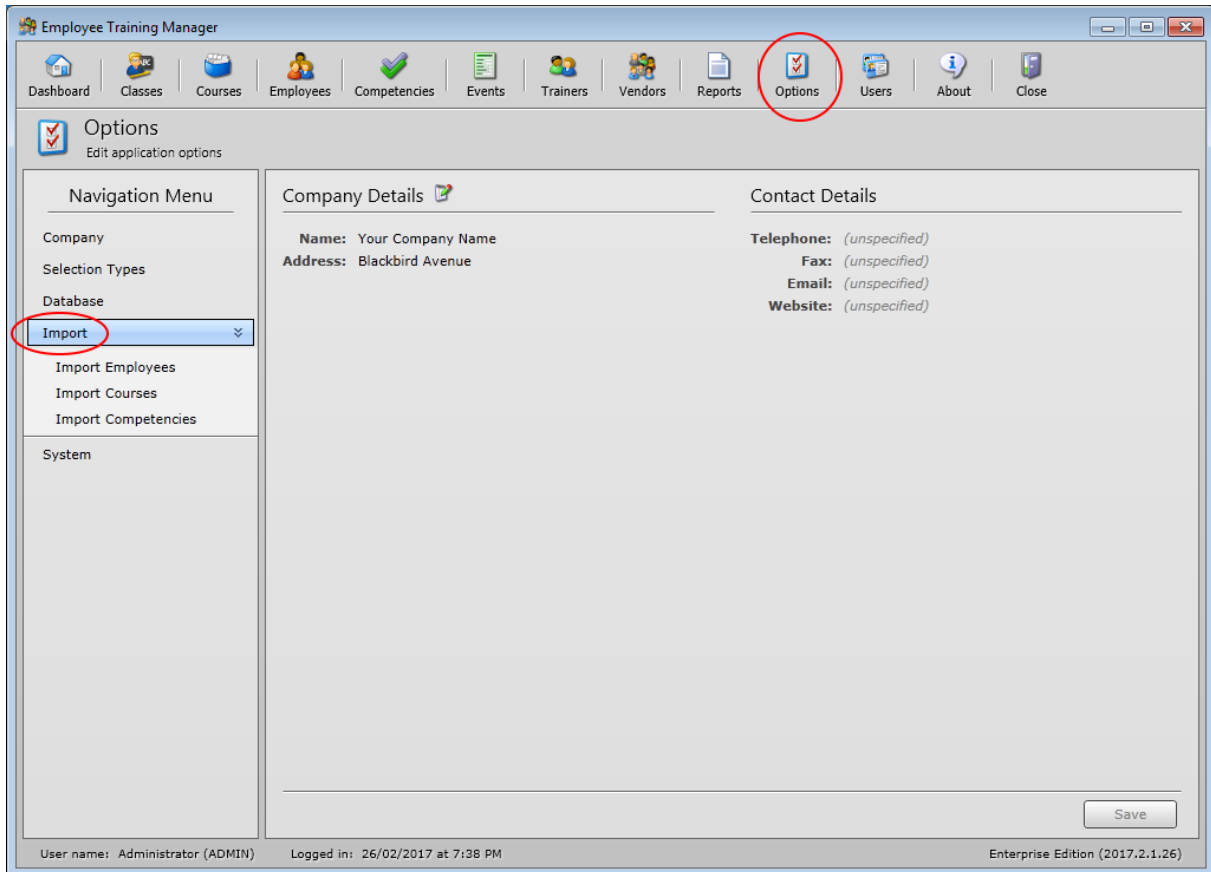
Smart Company Software
support@smartcompanysoftware.com

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

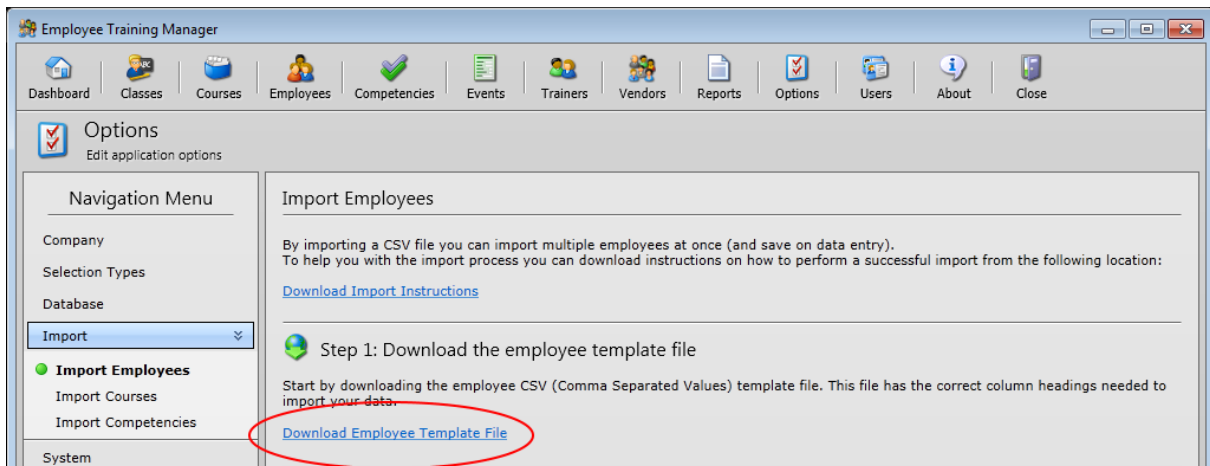
You must follow these steps to ensure a successful import of your data.

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 | 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 |

If an employee record in the import file has an employee number, the import process will search for an employee in the database before importing the record. If a match is found, the employee information is updated based on the values in the import file. If no match is found, the employee record is created as a new employee. If no value exists in the employee number, the employee is created as a new employee.

3) Import the employee data

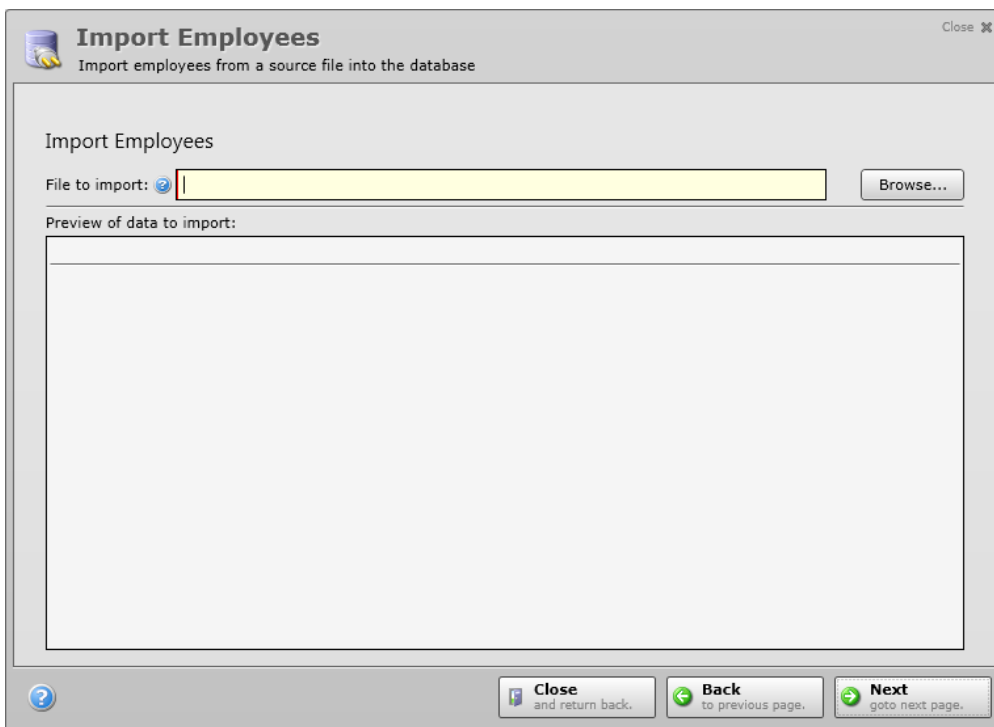
Once you have populated the data into the template you are ready to import your data into the database. To start, click the **Import Employees** button.

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.

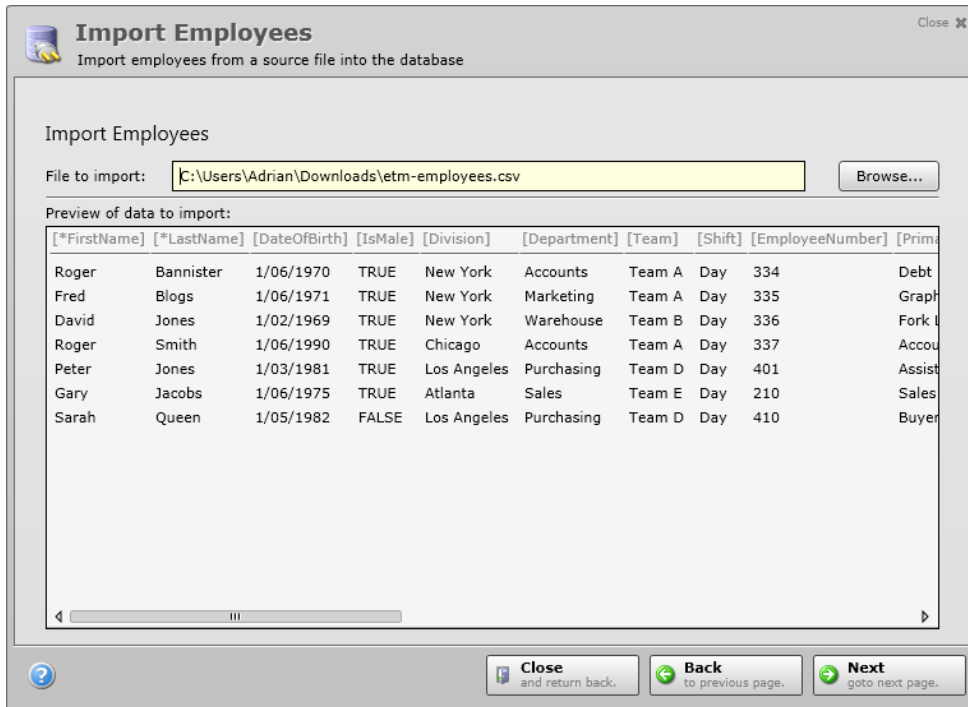


To proceed with the import, click the **Next** button.

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.



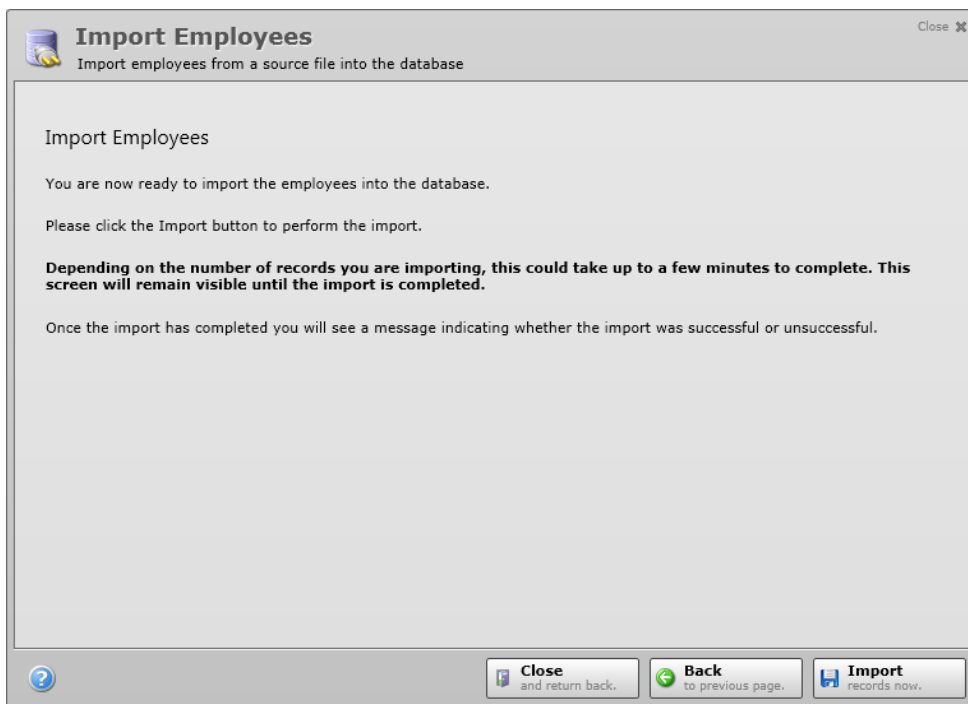
A preview of the data is also displayed so you can check that the data looks correct. It is recommended you review the data before proceeding. Pay attention to the column names and the data in each column to make sure it matches what you expect to see.



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.

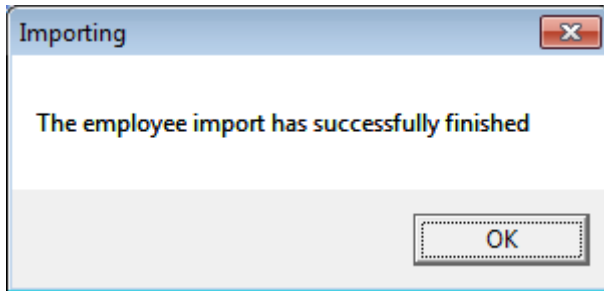
Once you are satisfied the data is correct, click the **Next** button.

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

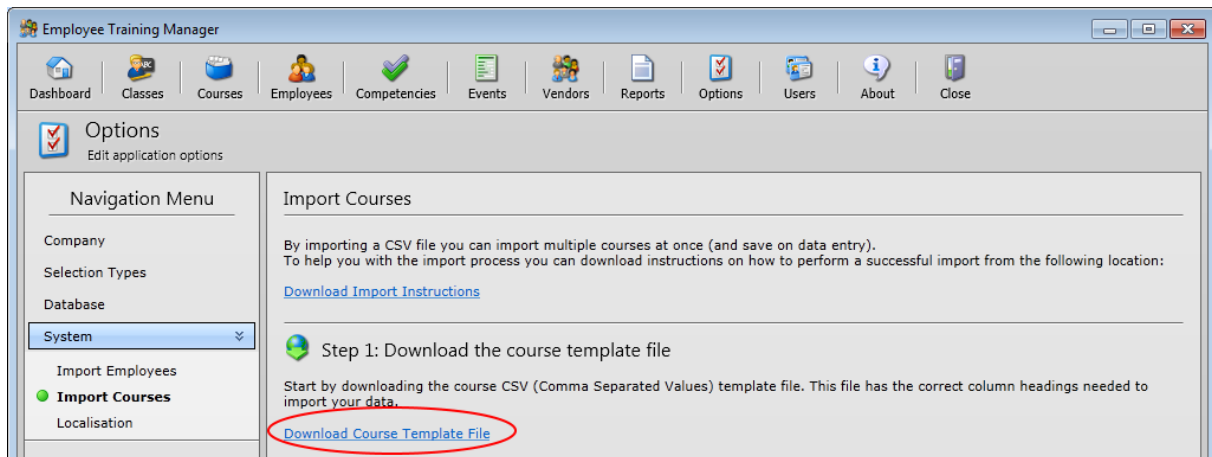
You must follow these steps to ensure a successful import of your data.

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.

| A1 | *FirstName | | | | | | | | | | | | | | | | | | | | | | | | | |
|----|------------|-----------|-------------|--------|-------------|------------|--------|-------|----------------|------------------|------------------|-------------|-------------|-------------|----------------------------------|------------------------------|----------|-------------|-----------|------------|--|--|--|--|--|--|
| | *FirstName | *LastName | DateOfBirth | IsMale | Division | Department | Team | Shift | EmployeeNumber | PrimaryJobRole | SecondaryJobRole | Telephone | Extension | Cell | Email | IsExclude | DateEmpl | Classificat | Location | CostCentre | | | | | | |
| 2 | 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 | | | | | | | |
| 3 | 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 | | | | | | | |
| 4 | 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 | | | | | | | |
| 5 | 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 | | | | | | | |
| 6 | 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 | | | | | | | |
| 7 | 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 | | | | | | |
| 8 | 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

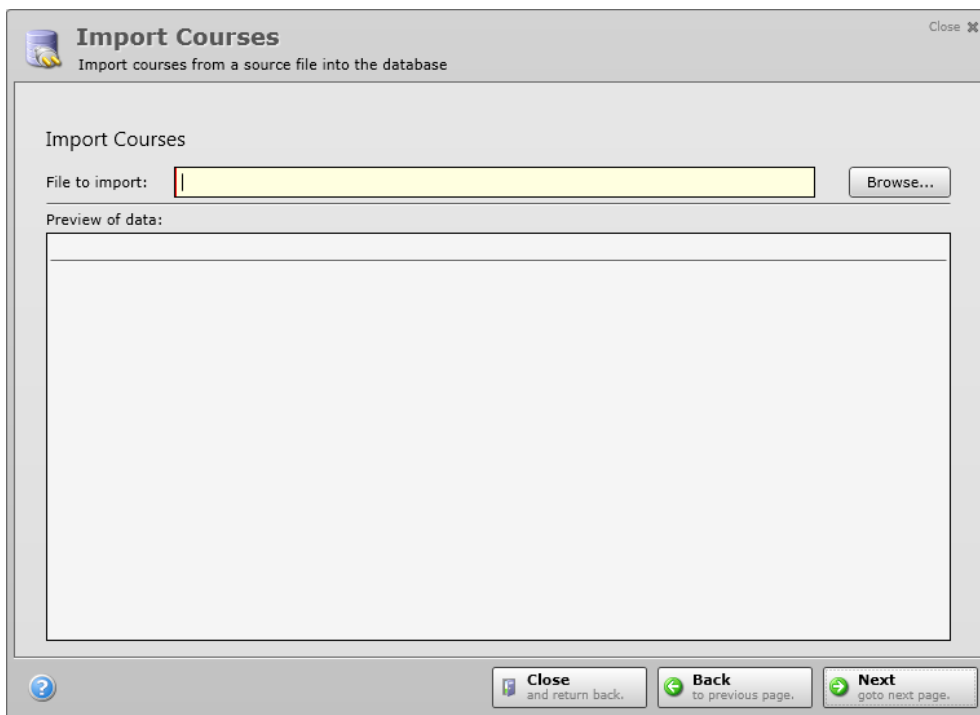
Once you have populated the data into the template you are ready to import your data into the database. To start, click the **Import Courses** button.

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.

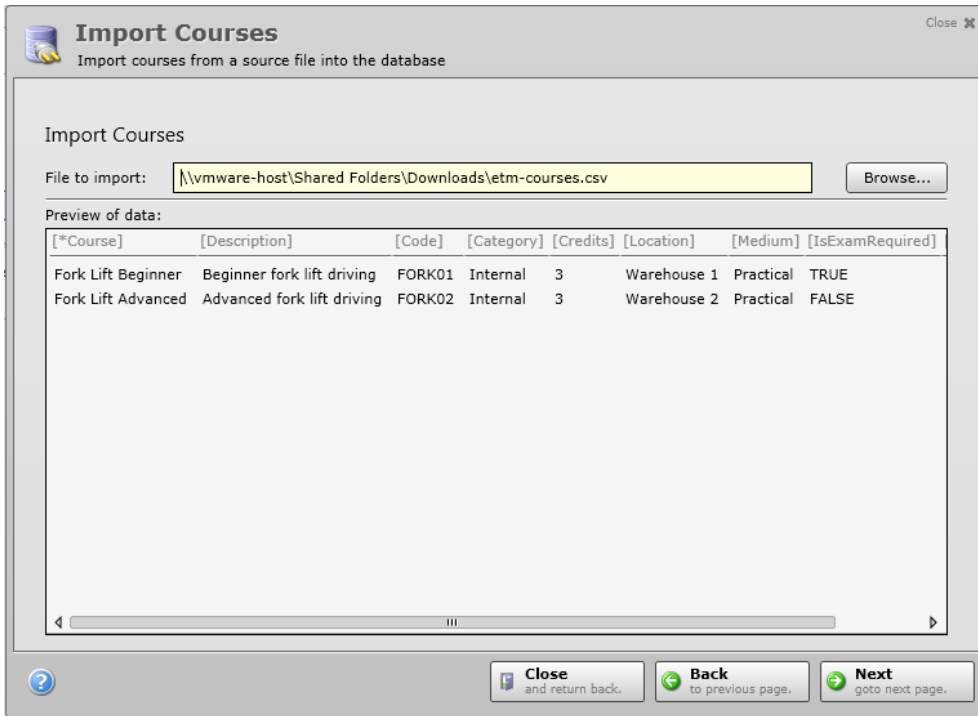


To proceed with the import, click the **Next** button.

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.



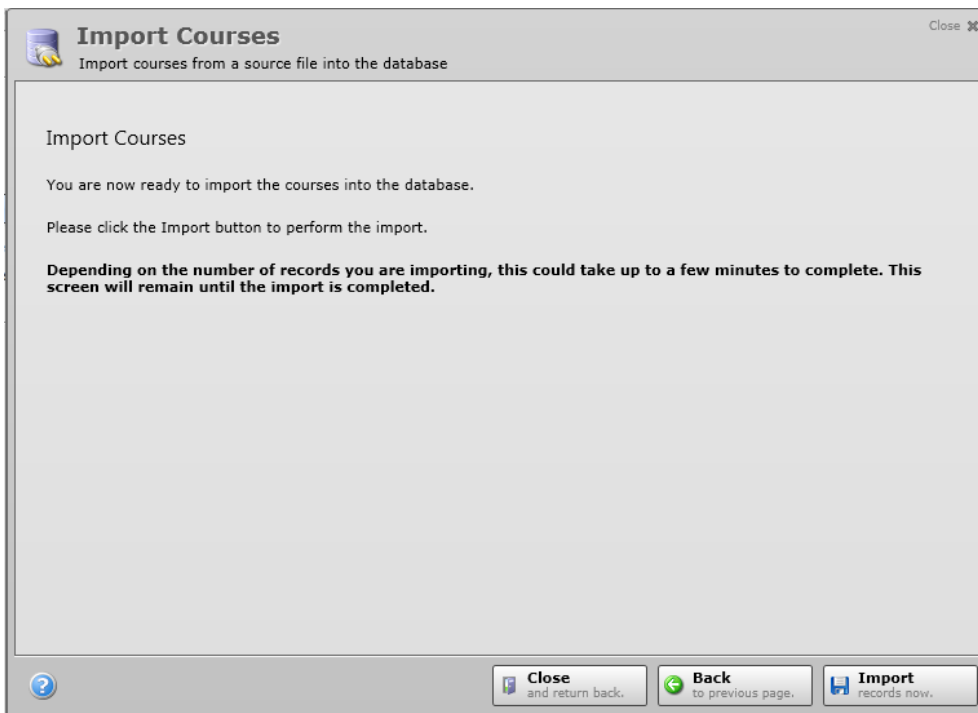
A preview of the data is also displayed so you can check that the data looks correct. It is recommended you review the data before proceeding. Pay attention to the column names and the data in each column to make sure it matches what you expect to see.



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.

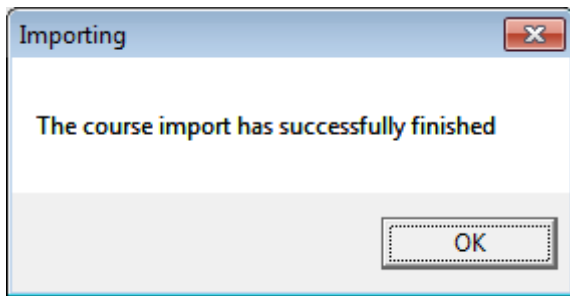
Once you are satisfied the data is correct, click the **Next** button.

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

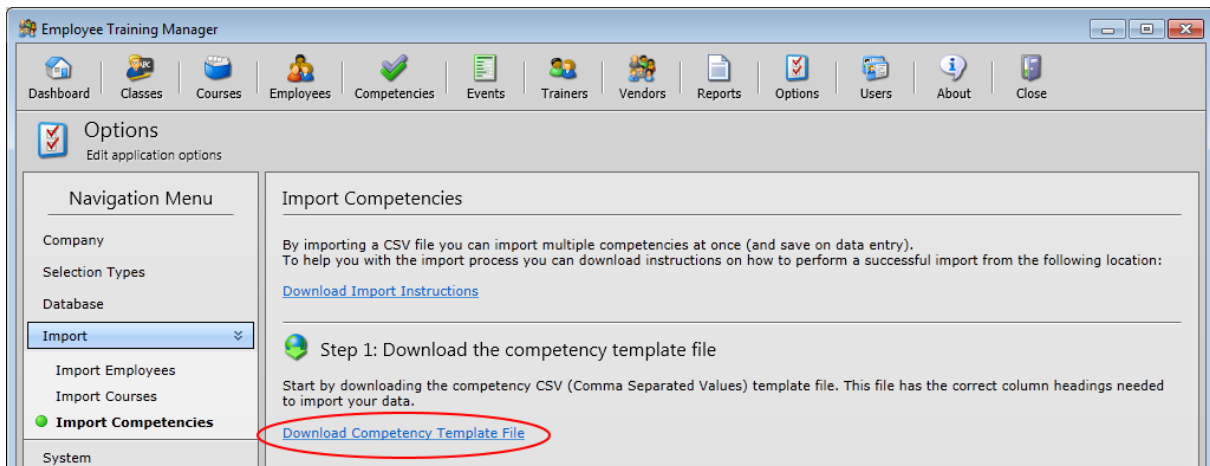
You must follow these steps to ensure a successful import of your data.

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 | 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.

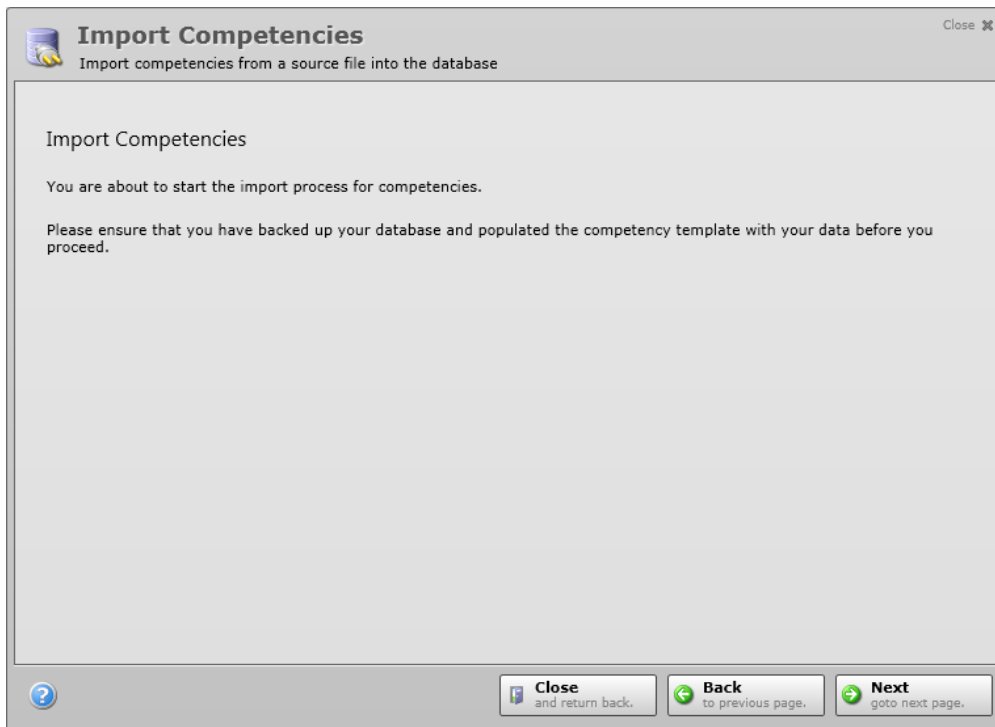
Do not change the names of the column names in the first row, or delete the row.

| 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

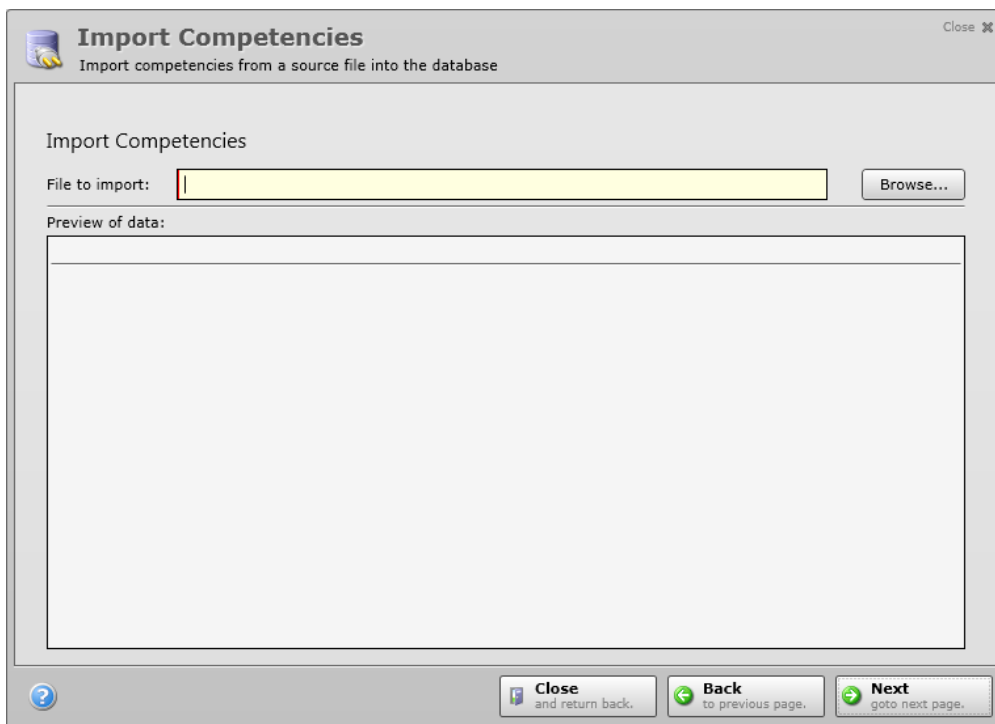
Once you have populated the data into the template you are ready to import your data into the database. To start, click the **Import Competencies** button.

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.

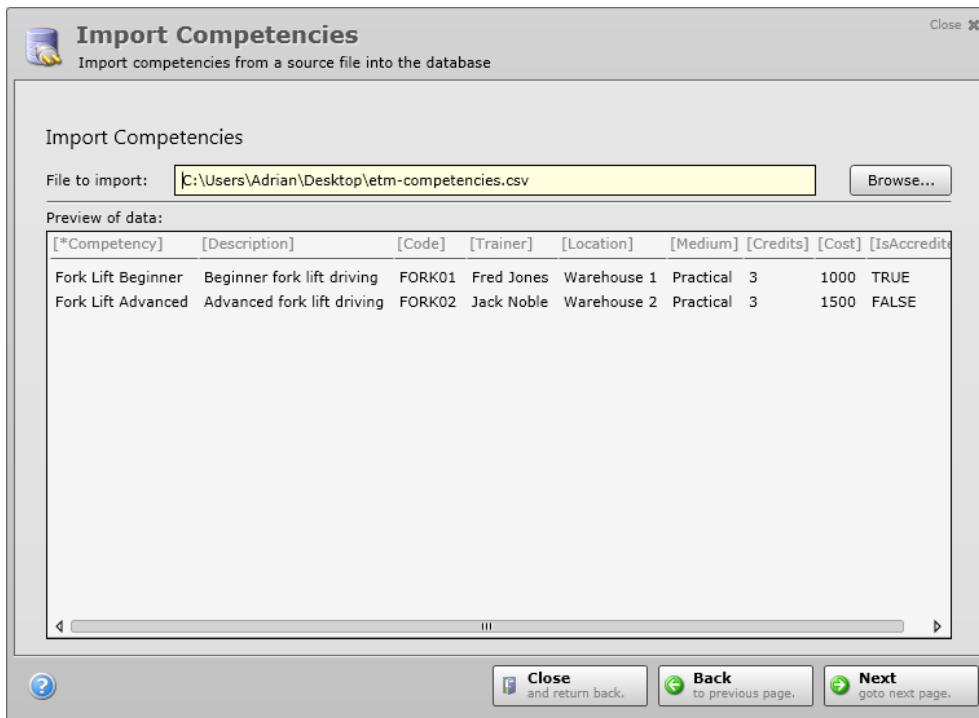


To proceed with the import, click the **Next** button.

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.



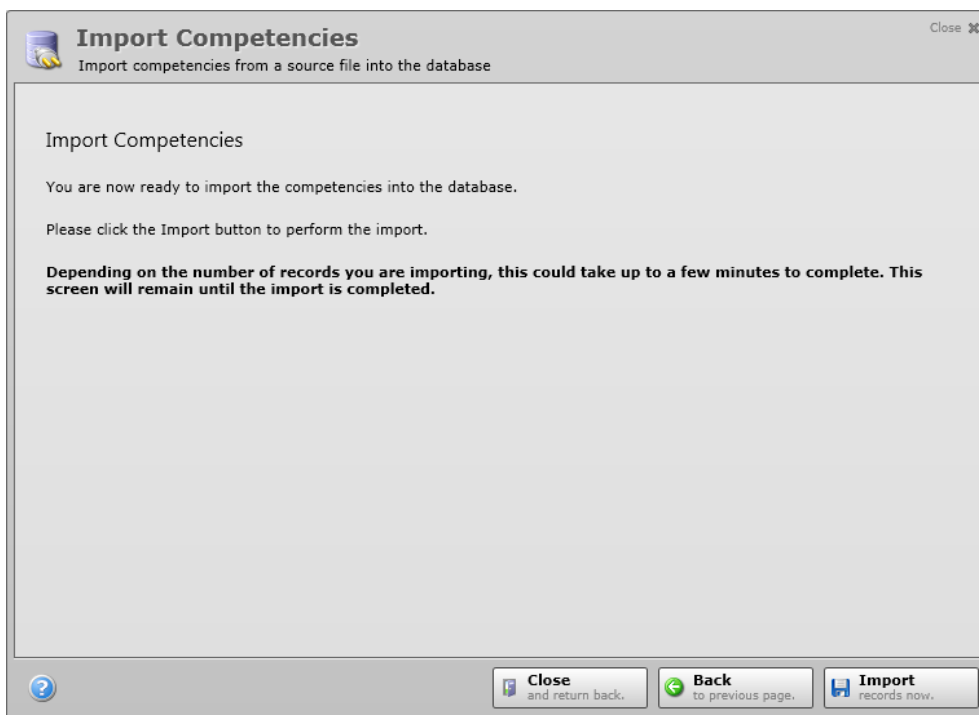
A preview of the data is also displayed so you can check that the data looks correct. It is recommended you review the data before proceeding. Pay attention to the column names and the data in each column to make sure it matches what you expect to see.



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.

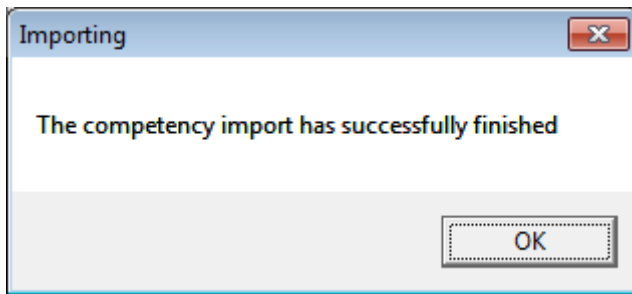
Once you are satisfied the data is correct, click the **Next** button.

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.