Import of personnel files

Danielle Software allows employee information to be imported easily via an XLS import file.

The following options are available for dealing with the data:

1. Simple import
2. Changes to the imported data
3. Additions to data already imported
4. Import/export

The current import file can always be downloaded in the tile **Employees** in the footer under **Download import template (Excel)**. Please save the file and then open it.

The import file consists of various spreadsheets that display the different fields in the personnel file.

Simple import

The user only has to fill the mandatory fields marked by * with data to create a personnel file. Information can be entered individually in all the other fields at a later date. This saves entering data manually in the respective personnel files.

As soon as the mandatory fields for an employee have been filled and login details have been assigned, other components such as time recording can be used by this employee.

Here you can see an example of how to populate data fields for the simple import.

View of the employee overview after simple import with mandatory fields.

Changes to the imported data

This import file can be subsequently filled with data and imported again. The new data will overwrite the previous entries. Therefore, it is IMPORTANT that there are no empty fields, which were previously filled with data, for all lines with e-mail reference. Otherwise the empty fields will overwrite the fields that were previously populated.

Adding new employees to personnel files already imported

New personnel files can be added easily in a new import file. In this way, data already imported are not affected.

Here you can see an example of how to populate data fields for a full import.

View of the employee overview after full import (completion of the first import).

Import/export

If a user would like to keep a comprehensive import file, it is advisable to export the personnel files and then import the amended version.

The data records are assigned using employees' business e-mail addresses. Each row should contain an employee's data for the referenced e-mail address. It is useful to copy the first column (business email address*) with the respective referenced email addresses to the other spreadsheets in order to maintain the order of employees.

The following fields are mandatory:

Personal information

- Business e-mail address
- Employment status
- First Name
- Surname
- Languages

Contract:

- Business e-mail address
- Company

User administration

- Business e-mail address
- Profile

In order to import documents and contracts into a personnel file, a spreadsheet has been prepared in the import file which is to be filled as follows if necessary:

> (i) **Note**
>
> As far as personnel files are concerned, documents imported with this file are uploaded and always added! If a user repeats the import, the document would exist twice.
>
> Similarly, data would be overwritten or deleted if the employee's e-mail address is entered on another sheet of the import file!

Business e-mail address*

This field is mandatory because it is used to assign data to employees.

Document types

The documents that may have to be imported are defined in the configuration and should be allocated in the import file in accordance with the document types specified.

The reference field describes where the document can be inserted in the file and can later be retrieved and viewed.

Name of document

The name of the document must exactly match the file name to be uploaded, otherwise this file cannot be imported.

The file type can be png, .pdf, .jpeg, .jpg, .tif etc.

The import does not have to be specific to an employee or document type. All documents to be imported can be included in one .xls file. In this case, a data volume of 10 MB should not be exceeded.

Documents to be uploaded

A folder for storing the documents to be imported should be created in the file directory. The file names must be listed in the import file under "Name of document" in exactly the same way. There must be no blank spaces and attention must be paid to upper and lowercase letters.

Then these files and the import file must be created as a zip file. The import file has to be available in the *.zip folder in order to upload the documents. To this end, the user has to mark all the documents in the folder including the .xls file, click the right mouse button and select 7-Zip -> Add to 'Name of import'.zip.

Then the zip folder is displayed in the directory.

Field description for correct filling with data:

Personal information

Employment status	Employed Alumni Under termination Pending
Gender	Male Female Other
Address valid from	DD.MM.YYYY
Date of Birth	DD.MM.YYYY
Marital status	Divorced Single Married Widowed
Children	'Enter number'
Nationality	'Enter country'
Languages	German; native language#English; very good#French; good
Photo	See documents (the file name has to be exactly the same as the file)
Health insurance company and insurances	E.g.: Health insurance provider; 1833 091167#Tax office; 38294/1508

Contract

Company	'Short name of the company' or if no corporate hierarchy exists, the field can also be left blank.
Contract type	This must have been previously stored in the configuration for contracts, e.g. part-time, full-time
Valid from	DD.MM.YYYY

Models for working time/extra pay

These must have been defined in the configuration and it is advisable to fill these fields with more details manually. The name of the working time model and the **Valid from** date are required here, separated by a semicolon.

Example: Name working time model; 01.01.2020

Education

Now the user opens the personnel file/employee overview in the Danielle Software and imports this zip file.

Once the import has been completed, the number of imported personnel files is displayed.

Overview of employees after the import of a personnel file.

Errors during import

If errors occur in the import file, the system will display them as follows:

[Name.Referenceemail@company.com - Table Personal information row 3 column X] Language or language level empty: Entry of language and language level is mandatory.
[Name.Referenceemail@company.com - Table Contract row 7 column E] no date: 'unlimited'
[Name.Referenceemail@company.com - Table Contract row 2 column O] no catalogue entry exists for 'Months'.
[Name.Referenceemail@company.com - Table Personal information row 6 column Q] no catalogue entry exists for 'Rhineland-Palatinate'.

The information is self-explanatory, the user only has to look at the referenced field in the import file. It is important to always use the correct or expected spelling.
E.g. Month is expected instead of Months and Rhineland-Palatinate is written with a hyphen.

Only files without errors are uploaded.

Degrees, qualifications and certificates	See documents (the file name has to be exactly the same as the file)
Training	Title;qualification;trained from;trained till Ex..: Car mechanic;yes; 01.08.2002;31.03.2006#IT specialist for application development;yes; 01.08.2013;31.07.2016

Department

Superior	'Superior's e-mail address'
Deputy for	'Superior's e-mail address'

Events

Completed	Yes No

User administration

Profile*	HR Employee

* If no profile is selected, "Employee" is automatically entered via the import.

Contracts and documents

This spreadsheet contains files that can be uploaded, added to and retrieved from a specific personnel file.

Files are always added. Repeating the import with completed contract and document files leads to a further file import, so that the document then exists twice.

Document types	results from the previous configuration
Name of document	See documents (the file name has to be exactly the same as the file)