

Personnel Import

The Personnel import starts with filling out the Personnel Import template.

	А	В	С	D	E	F	G	Н	I.	J	К	L	М
1	First Name	Last Name	Phone Number	E-mail	Hire Date	Termination D	Code	Supervisor	Service Tech	Veterinarian	Nutritionist	Barn Manager	Site Manageı
2								Place an X in t	he fields they v	vould be assign	ed		
3	Required	Optional	Optional	Optional	Optional	Optional	Required	Optional	Optional	Optional	Optional	Optional	Optional
4	Test Site			test@gmail.com			00TR56SF					x	
5	Test 2			test2@gmail.com			00098HG					x	
6													
7													
8													

Column A - is the first name of the person you are adding and is **required**.

- Column B is the last name of the person you are adding.
- Column C is the phone number for the person you are adding.
- Column D is the Email address for the person you are adding.
- Column E is the Hire Date for the person you are adding.
- Column F is the Termination Date of the person you are adding or updating.

Column G - is the Personnel Code, this is **required** and must be unique to each new personnel addition.

Columns H thru M - are to be marked with an x to indicate the personnel additions role to the company.

Columns N thru R- are Custom Roles to be used if the roles on columns H-M do not apply.

Once you have your import file created, you are ready to import. Go to Assurance > Imports > Personnel Import.

Finish	Sales	Finance	Assurance Analytics S	ecurity Help Ch	ange Company	
			Data Entry $- \stackrel{\wedge}{\mathcal{H}}$ Schedule Assessments $- \stackrel{\wedge}{\mathcal{H}}$ Enter Assessment Results A	VFD └──☆ Create/Find VFD:	Imports s ー☆ Certification Import ☆ Personnel Import	AMetaFarr Monday, February 5, 2 Lorianne Stevens (Log

Then under the Standard tab, select Personnel Import.

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Feed Bud	lget Import			
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Feed For	mulation Imp	ort		
Group Ev	ent - Treatme	ents		
Group Ex	penses -Orig	inal		
Group Ex	penses -Stan	dard		
Group Ex	penses -Stan	dard Nutriti	on	
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Mortality	Import - Sta	ndard		
Moveme	nt Import - S	tandard		
Moveme	nt Import - w	ith Comme	nts and Subg	groups
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Next, click the Choose File button and browse to the location of the file to be imported. Then click Process File.

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Once the document is uploaded, click Match Records.

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Row	Ready	Delete	*First Name	Last Name	Phone Number	Email	Hire Date	Termination Date	*Personnel Code	Supervisor	Service Tech	Veterinarian	Nutritionist	Barn Manager	Site Manager	Custom Role1	Custom Role2	Custom Role3	Custom Role4	Custom Role5	Additional
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Once lines have been matched and are marked Import Ready, click Import.

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Row	Import Ready	Delete	*First Name	Last Name	Phone Number	Email	Hire Date	Termination Date	*Personnel Code	Supervisor	Service Tech	Veterinarian	Nutritionist	Barn Manager	Site Manager	Custom Role1	Custom Role2	Custom Role3	Custom Role4
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Your Import is now complete!

	Hire Date	Termination Date	*Personnel Code	Supervisor	Service Tech	Veterinarian	Nutritionist	Barn Mana
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Note: To view the Personnel added, go to the setup tab of any module, and select Personnel setup.