

## Personnel Import

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

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	First Name	Last Name	Phone Number	E-mail	Hire Date	Termination D	Code	Supervisor	Service Tech	Veterinarian	Nutritionist	Barn Manager	Site Manager
2								Place an X in the fields they would be assigned					
3	Required	Optional	Optional	Optional	Optional	Optional	Required	Optional	Optional	Optional	Optional	Optional	Optional
4	Test Site			<a href="mailto:test@gmail.com">test@gmail.com</a>			00TR56SF						x
5	Test 2			<a href="mailto:test2@gmail.com">test2@gmail.com</a>			00O98HG						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.

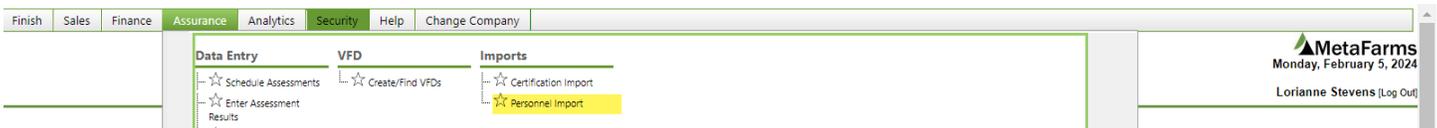
Column F - is the Termination Date of the person you are adding or updating.

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.



Then under the Standard tab, select Personnel Import.

Select Import:

- Boar Stud Import
- Certification Import
- Feed Bin Import
- Feed Budget Import
- Feed Formulation AccuFeed Import
- Feed Formulation Brill Import
- Feed Formulation Import
- Group Event - Treatments
- Group Expenses -Original
- Group Expenses -Standard
- Group Expenses -Standard Nutrition
- Growth Curve Feed Import
- Mortality Import - Standard
- Movement Import - Standard
- Movement Import - with Comments and Subgroups
- Movement Import - with Subgroup
- Personnel Import**
- Weekly Ingredient Prices Import

Next, click the Choose File button and browse to the location of the file to be imported. Then click Process File.

All Feed Sow Sales Standard

Select Import: Personnel Import

Choose File Personnel Import 1.xlsx Process File

Import Delete Records Match Records

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	Custom Role5	Additional
	<input type="checkbox"/>	<input type="checkbox"/>																			

No records to display.

Page size: 50

Once the document is uploaded, click Match Records.

All Feed Sow Sales Standard

Select Import: Personnel Import

Choose File No file chosen Process File

Import Delete Records Match Records

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	Custom Role5	Additional
1	<input type="checkbox"/>	<input type="checkbox"/>	Test Site			test@gmail.com			00TR565F					x							
2	<input type="checkbox"/>	<input type="checkbox"/>	Test 2			test2@gmail.com			00O98HG					x							

Page size: 50

Once lines have been matched and are marked Import Ready, click Import.

All Feed Sow Sales Standard

Select Import: Personnel Import

Choose File | Import Chosen | Process File

Import | Delete Records | Match Records

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
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Test Site			test@gmail.com			00TR565FF					x					
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Test 2			test2@gmail.com			00C98HGG					x					

Page size: 50

Your Import is now complete!

Hire Date	Termination Date	*Personnel Code	Supervisor	Service Tech	Veterinarian	Nutritionist	Barn Manager

**Import Complete**

Import Complete

OK

**Note:** To view the Personnel added, go to the setup tab of any module, and select Personnel setup.