



Import Personnel Instructions & Specifications

The Skills DB Pro .csv file import system will both insert new records and update current records. Records will never be deleted, though you can set a record as inactive. Please see validation logic to see how inserts and updates are defined.

We have included a lot of technical data here to answer any questions you have.

The process is actually really simple once you get your file setup. Most systems will export directly to a .csv file and if you setup your report fields similar to the downloadable template, importing records is easy.

Quick Start:

1. Download the .csv file and populate it. It must be imported as a .csv file as well.
2. Rules:
 - a. File Type-Must be a comma separated value file .csv
 - b. Field Names - Do not change any of the field names. Any field names changed won't be imported.
 - c. Field Lengths - Any fields with lengths longer than those listed below will be truncated(shortened to the maximum length of the field)
 - d. Required Fields - Make sure all required fields are being used.
 - e. Fields left blank, during an update are not updated., during an insert are not inserted.
3. Double check your file. Once updated the process cannot be undone.
4. Click Choose File – Select your file from your computer.
5. Click Import. After the import is run you will get a line by line report as to the status of the import.

Field Definitions:

Please note you **cannot change the field names** on the template or they will not be read in. Furthermore, data types must match up. Though, you can change the order of the columns to make it easier you if necessary. Any fields over the maximum length will be truncated to the Max Length.

Field Name	Type	Max Length	Required	Inserted	Updated	Notes
LastName	nvarchar	100	Yes	Yes	No	
FirstName	nvarchar	100	Yes	Yes	No	
EmailAddress	nvarchar	100	Yes	Yes	No	
YourPersonID	nvarchar	40	No	Yes	No	Many clients use this to refer to an employee id from another system.
Login	nvarchar	100	No	No	No	If no login is supplied then the email address will automatically populate this field.
Password	nvarchar	40	No	Yes	Yes	Password to be used to log into Skills DB Pro.
GroupID	int	4	No	Yes	No	The Group ID represents the Security Access Level you want this person to have in Skills DB Pro: 1=Self 2=Expert 4=Manager 5=Executive 7=Admin

NextAvailDate	datetime	8	No	Yes	Yes	Many clients use this to show when this person is available for another project. Often imported from the project management system.
Gender	nvarchar	20	No	Yes	Yes	Male or Female
Company	nvarchar	100	No	Yes	Yes	The Company the employee or consultant is part of.
BusinessPhone	nvarchar	50	No	Yes	Yes	
HomePhone	nvarchar	50	No	Yes	Yes	
MobilePhone	nvarchar	50	No	Yes	Yes	
FaxNumber	nvarchar	50	No	Yes	Yes	
Address	nvarchar	100	No	Yes	Yes	
City	nvarchar	100	No	Yes	Yes	
StateProvince	nvarchar	100	No	Yes	Yes	
ZIPPostalCode	nvarchar	30	No	Yes	Yes	
country_name	nvarchar	80	No	Yes	Yes	We have a full Country List that we suggest you use to keep your data more accurate. Though you can include your own spellings if you like.
WebPage	nvarchar	200	No	Yes	Yes	Clients will use this for their home page or for the employee's intranet page.
Notes	nvarchar	2000	No	Yes	Yes	
BusinessRegion	varchar	50	No	Yes	Yes	Business Region - Divide your business up geographically
DepartmentName	nvarchar	100	No	Yes	Yes	Departments
JobTitleName	varchar	50	No	Yes	Yes	Job Titles
PeopleTypeName	nvarchar	100	No	Yes	Yes	Many clients will use this for Consultant/Employee. Though it can be used however you like.
ManagersEmail	nvarchar	100	No	Yes	Yes	If you want to have an employee assigned to a manager, this needs to be the managers email address. And all managers need a groupID of 4 or higher.
IsActive	Boolean	1	No	No-Active	Yes	On insert this is set to 1=true on update you can change it 0=False, can only be 1, 0 or empty(wont update)
JobRole	Nvarchar	50	No	Yes	Yes	Use to define Job Role for the goals and competency management module.

Validation Logic and Errors:

Inserting:

The Login Field and Email Address must be unique to the Skills DB Pro System. If YourPersonID field is being used this must be unique to your company as well. If any of these fields are not unique then the system assumes you are trying to update this person.

1. Email Address is required.
 - a. The Email Address is a required field.
2. Email Address must be unique to the system.
 - a. The Email Addresses field must be unique. This one already exists in the system
3. The Login Field must be unique. The Login Field is optional though if it is left null then the Email Field is substituted.
 - a. The Login field must be unique. This one is already being used in the system.

Updating

All matching for the update process is done on the Email Address. Thus, items without an Email Address in the system cannot be updated.

During updates the system will not allow you to change either an email address or a login. These two items must be unique to the system. The reason for this is, if you changed the login during the update process, that user would not be able to get into the system.

1. If a login exists for a different email in the system where the login does not match an error will be thrown.
 - a. The Login exists for a different Email in the system already. The Login & Email combination must be unique.
 - b.
2. If an email exists for a different log in the system where the email does not match an error will be thrown.
 - a. The Email exists for a different Login in the system already. The Email & Login combination must be unique.

Country List

Use the below list for your country names to create consistency throughout the system. Though this is not required if you use a different spelling for a country the system will accept it.

Afghanistan	Ghana	Northern Mariana Islands
Albania	Gibraltar	Norway
Algeria	Glorioso Islands	Oman
American Samoa	Greece	Pakistan
Andorra	Greenland	Palau
Angola	Grenada	Palmyra Atoll
Anguilla	Guadeloupe	Panama
Antarctica	Guam	Papua New Guinea
Antigua and Barbuda	Guatemala	Paracel Islands
Argentina	Guernsey	Paraguay

Armenia	Guinea	Peru
Aruba	Guinea-Bissau	Philippines
Ashmore/Cartier Islands	Guyana	Pitcairn Islands
Australia	Haiti	Poland
Austria	Heard Island and McDonald Islands	Portugal
Azerbaijan	Holy See (Vatican City)	Puerto Rico
Bahamas, The	Honduras	Qatar
Bahrain	Hong Kong	Reunion
Baker Island	Howland Island	Romania
Bangladesh	Hungary	Russia
Barbados	Iceland	Rwanda
Bassas da India	India	Saint Helena
Belarus	Indonesia	Saint Kitts and Nevis
Belgium	Iran	Saint Lucia
Belize	Iraq	Saint Pierre and Miquelon
Benin	Ireland	Saint Vincent and the Grenadines
Bermuda	Israel	Samoa
Bhutan	Italy	San Marino
Bolivia	Jamaica	Sao Tome and Principe
Bosnia and Herzegovina	Jan Mayen	Saudi Arabia
Botswana	Japan	Senegal
Bouvet Island	Jarvis Island	Serbia and Montenegro
Brazil	Jersey	Seychelles
British Indian Ocean Territory	Johnston Atoll	Sierra Leone
British Virgin Islands	Jordan	Singapore
Brunei	Juan de Nova Island	Slovakia
Bulgaria	Kazakhstan	Slovenia
Burkina Faso	Kenya	Solomon Islands
Burma	Kingman Reef	Somalia
Burundi	Kiribati	South Africa
Cambodia	Korea, North	South Georgia/South Sandwich Islands
Cameroon	Korea, South	Spain
Canada	Kuwait	Spratly Islands
Cape Verde	Kyrgyzstan	Sri Lanka
Cayman Islands	Laos	Sudan
Central African Republic	Latvia	Suriname
Chad	Lebanon	Svalbard
Chile	Lesotho	Swaziland
China	Liberia	Sweden
Christmas Island	Libya	Switzerland
Clipperton Island	Liechtenstein	Syria
Cocos (Keeling) Islands	Lithuania	Taiwan
Colombia	Luxembourg	Tajikistan
Comoros	Macau	Tanzania
Congo, Democratic Republic of the	Macedonia	Thailand
Congo, Republic of the	Madagascar	Togo
Cook Islands	Malawi	Tokelau
Coral Sea Islands	Malaysia	Tonga

Costa Rica	Maldives	Trinidad and Tobago
Cote d'Ivoire	Mali	Tromelin Island
Croatia	Malta	Tunisia
Cuba	Man, Isle of	Turkey
Cyprus	Marshall Islands	Turkmenistan
Czech Republic	Martinique	Turks and Caicos Islands
Denmark	Mauritania	Tuvalu
Djibouti	Mauritius	Uganda
Dominica	Mayotte	Ukraine
Dominican Republic	Mexico	United Arab Emirates
East Timor	Micronesia, Federated States of	United Kingdom
Ecuador	Midway Islands	United States
Egypt	Moldova	US Minor Outlying Islands
El Salvador	Monaco	Uruguay
Equatorial Guinea	Mongolia	Uzbekistan
Eritrea	Montserrat	Vanuatu
Estonia	Morocco	Venezuela
Ethiopia	Mozambique	Vietnam
Europa Island	Namibia	Virgin Islands
Falkland Islands (Islas Malvinas)	Nauru	Wake Island
Faroe Islands	Navassa Island	Wallis and Futuna
Fiji	Nepal	West Bank
Finland	Netherlands	Western Sahara
France	Netherlands Antilles	Yemen
French Guiana	New Caledonia	Zambia
French Polynesia	New Zealand	Zimbabwe
French Southern and Antarctic Lands	Nicaragua	
Gabon	Niger	
Gambia, The	Nigeria	
Gaza Strip	Niue	
Georgia	Norfolk Island	
Germany		