Onboardee/User creation using Excel import_

Welcome to the manual about how to create several onboardees at the same time using the excel import function. It will discuss the following aspects:

- When to import using excel
- How to fill in the excel template
- How to correct for mistakes
- Bulk operations
- Import using excel for users

When to import using excel

If your company has more than 100 people starting at the same time and you want them to be imported quickly, you can make use of this functionality: the import using excel.

However, be aware that you will need to create a separate excel sheet for each filter combination. So if your company uses "Location" and "Department" as their filter categories, the onboardees in the excel sheet should get the same location and department assigned to them. Otherwise, you cannot perform the whole import at the same time and need to go through an extra bulk operation or manual operation later.

Example of three onboardees:

Onboardee	Location	Department
John	Netherlands	Marketing
Maria	Germany	Sales
Marcus	Netherlands	Marketing

So in this example John and Marcus should be imported in the same sheet, whereas a new sheet should be created for Maria.

Keep in mind that the maximum number of uploads in 1 file is about 400 people per batch.

How to fill in the excel template

When you are in the onboardee overview, go and click on "actions" and then select "import using excel".
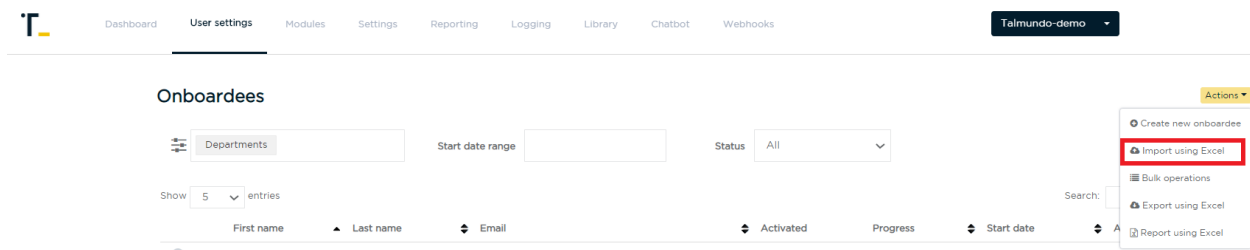
You are guided to the upload screen, where you can download an excel template by clicking on "template for onboardings". This template is always the most up-to-date way of importing onboardees. Therefore, make sure to always download this again when preparing a new batch of onboardees.

After you have downloaded the template, you can see that the first row is already filled with an example onboardee "John Doe". This is to show you how the data should be entered, but you can delete this row once you're done of course. Mandatory fields are: Firstname, Lastname, E-mail address and Start date. For the start date field it's important that you use either DD-MM-YYYY or DD/MM/YYYY as a format. Also, if your application uses the key contacts module, you can already assign the key contacts to the onboardees, by filling in the e-mail addresses of the respective key contacts in the last fields of the template. Be aware that you need to fill in the e-mail addresses and not the names of the key contacts as you would do if you add them manually. In this example the key contacts are the columns I, K and L (Manager, Buddy and HR contact respectively).

Now, save the excel file and upload it.

How to correct for mistakes

After you uploaded the file, if you've made a mistake, the platform will notice and will say that a certain amount of rows contained errors. By clicking on the yellow "Export" button, you can download the sheet and all rows that contained errors will be marked.

Now, look through the file until you see small red triangles in the corner of a field. By hovering over it, it will tell you what the error of the field contains. In this example it tells me that the contact could not be found. This means that "contact@talmundo.com" has not yet been added as a user in the application.

So, in order to assign key contacts to onboardees, you first have to add all the key contacts as users to the application. If you want to know more about how to do this, please have a look at the video about user creation.

After you corrected the mistakes, you can upload the file again until it shows to be uploaded successfully.

Good to know is that onboardees will just be updated and not created for the second time when doing this. The system will recognize the account and just update the information.

At the bottom of the page the platform also warns you that no invitation e-mails have been sent out yet and that you can do that via bulk operations. That is what we are going to do now by clicking on "Yes".

Bulk operations

You are now in the overview of all onboardees you just have uploaded using excel. As you have already sorted the onboardees in the excel file based on their filter combination, assigning these filters will be the first bulk operation we perform. If your app doesn't have filters, you can of course skip this step.

As the selection you're shown is already the correct one, you can select all of the onboardees from the list, by checking the box on the top left. Proceed by clicking "Next".

Now you get to the overview of all possible bulk operations you can carry out. The actions include the following:

Sending an email, where you have the choice between resending the invitation mail, or resetting their password. You can also edit all of them, reassign filters, key contacts or roles, or delete them & close their onboarding period.

Select action: Step 2 of 4

Bulk operations wizard can be used to perform specific operation on multiple onboardees or users.

Actions

⚪ Send email
⚪ Edit selected
⚪ Delete selected
⚪ Update filters
⚪ Close onboarding period
⚪ Assign key contacts
⚪ Assign roles

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Just select the option of your choice and follow the steps as suggested by the platform.

In this case, the first thing we do is assign the filters to all the onboardees. You can either start typing the filter name, or click on the field and select the filters that are applicable.

When you are done selecting the filters, click on "Next" to proceed with the bulk operation. In order to avoid mistakes a security question will always be asked after that. Just click on "Submit" if you are absolutely sure.

Also, be aware that all changes you make to the filters here, will override the filter combination any onboardee had before. Therefore, it is so important to split them into different excel files.

After you have submitted the operation, click on done to proceed with another bulk operation: Sending the invitation e-mail.

Select all onboardees again, click on next and perform the "send e-mail" operation. You now have the opportunity to choose between two e-mails: the invitation and the reset password e-mail. In this case you will select the "send invitation" mail and proceed by clicking on next. Again a security question will be asked and you can submit the operation.

Now all invitations have been sent out and you can go to any other screen you would like to see.

If we go back to the onboardee overview and type in "John" we will now see the onboardee with all his information. If you would like to know more on the onboardee overview, I advise you to check out our video on that.

Import using Excel for users

All the steps we just went through can also be used when importing users in Excel. As this is often done to create the key contact accounts, we usually take care of this before go-live. All possible key contacts in your company will be uploaded into the application so they can be assigned to onboardees at any stage and are able to receive all the preconfigured e-mails.

To do this, you also click on the "Actions" button, select "import using excel", and there you'll see the same hyperlink guiding you to the template to use for the import. We advise you to use this template as it is the most up-to-date version.

The template gives an overview of all information you add to the user accounts. Mandatory fields are again the Names and e-mail addresses of the users. The filters will be assigned later in a bulk operation. Note that key contacts usually receive all filters in order to be selected by all departments and countries as potential contacts.

If you would like to upload images with the key contacts you can do that in this import as well. For this we use the last column in the excel file: Image. All names in this column need to correspond with the name of the image file you want to use. So if you would like to upload an image for John you need to copy the exact name of the image file (plus extension) into that column. In this example that's: JOHN.JPG. After finishing your file and entering all the image names, you save this excel file together with all the images in one folder. Next, zip the file and upload it all together.

Be aware: If you want to upload images with the excel upload, the maximum amount of people in one upload is 100. Also the images need to be a 1:1 ratio and should not be bigger than 500kb.

If you're only uploading users without images, the limit is 400.

After uploading the excel file do not forget to assign all filters to the key contacts by using the bulk operations. Sending out an invitation email is not necessary in this case, as key contacts do not require access to the platform.

Now you know how to import onboardees using excel. Again, this way of working mostly makes sense if you have big amounts of onboardees at the same time. Let's get started using this tool to improve your processes and get those onboardees up and running! :)