

Import Data

Summary:

Import data into Gradience

Problem / Goal:

Import data into Gradience

Solution:

You may import only the fields on the **Field Layout** page (see page 2). There are two different file formats that you may import from:

- **Tab Delimited** (recommended)
- **Fixed Length**

For a Tab Delimited format, you may use any program that allows you to save as Tab Delimited. Excel and Access are two programs that will allow this. Tab Delimited is the recommended format.

Note: You cannot import directly from an Excel file (.xls extension). Once you have finished formatting your data in the Excel file, you will need to save as type: Text (Tab Delimited). When entering your information into a spreadsheet such as Excel, you will need to follow the order of the field names according to the Field Layout page.

For example, the columns should have SSN first, then Last Name, First Name, etc. Also, you will need to leave a blank column for any fields that you will leave blank. For example, following the format on the Field Layout page, we create a Tab Delimited file with the fields: SSN, **Last Name**, **First Name**, [blank column for Middle Initial field], **Location**, **Department**, **Date of Hire**, **Full/Part Time**, [blank column for Title field], [blank column for Employee Code field] and **Active Status**. All of the fields in bold are **required**, **which means that these columns may not be blank**. We would still need to have a blank column for MI, Title and Employee Code in the order of the fields.

For a Fixed Length format, you may use the DOS Editor or any other editor that shows you the field length. The lengths of each field must correspond to the Length column under the Field Layout page. We recommend using the Tab Delimited format.

Preparing the Gradience software for Import

You must create/setup your Locations and Departments in the gradience program before importing. In other words, you must go to **Settings > Locations/Departments** from within the gradience program and enter your locations and department names before importing your data. Please refer to the manual for instructions on creating your Locations and Departments.

Field Layout

The following is the field layout for importing text files into gradience. Fields shown in **bold** type are required and all import text files must include them. The alphabetical arrangement as indicated by the letters on the left indicates the columns under which the information would fall within an Excel spreadsheet.

You **MUST** have a column for each type of information (**both "required" & "Not-required" data**) shown below. **Only** the items in **BOLD** below are **required**. The items not in BOLD below are not required fields **but the columns which would contain the non-required information MUST exist even if they are blank**. The data may not be required but the column that would contain such data is.

For example:

If no Social Security Number is available, column **A** is still required but may remain blank. The Lat Name is required and **MUST** appear in column **B**.

| | | | |
|---|------------------------|----|--------------------------------|
| A | Social Security Number | 11 | 123-45-6789 |
| B | Last Name | 20 | up to 20 characters |
| C | First Name | 20 | up to 20 characters |
| D | Middle Name | 20 | up to 20 characters |
| E | Location | 50 | up to 50 characters |
| F | Department | 50 | up to 50 characters |
| G | Date Of Hire | 10 | MM/DD/YYYY (slashes required) |
| H | Full/Part Time | 9 | Full-Time or Part-Time (only) |
| I | Title | 30 | up to 30 characters or numbers |
| J | Employee Code | 14 | up to 14 characters of numbers |
| K | Active Status | 10 | Active, Inactive, Terminated |

If you have Gradience Records installed, your text file can also include the following fields:

Knowledgebase ID:

Published: 30-Dec-09
Updated: 14-Apr-10
Product: Gradience Professional/Enterprise

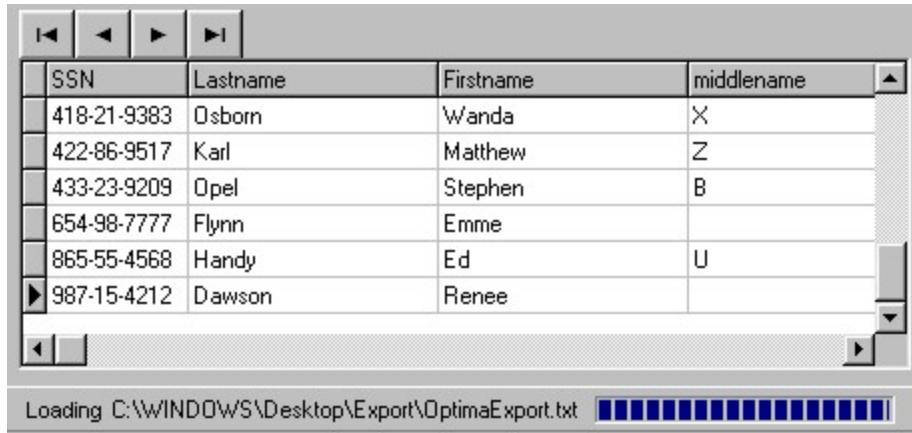
Product Version(s): 10, 11

Categories:

| | | | |
|----|-------------------------|----|--|
| L | Date of Birth | 10 | MM/DD/YYYY (slashes required) |
| M | Address 1 | 30 | up to 30 characters or numbers |
| N | Address 2 | 30 | up to 30 characters or numbers |
| O | Home Phone | 30 | 800-123-4567 (dashes required) |
| P | City | 30 | up to 30 characters or numbers |
| Q | State (2 character) | 2 | 2 characters, i.e., FL |
| R | Zip Code | 15 | 33325-1234 (-1234 can be omitted) |
| S | Salutation | 5 | Mr. – Ms. – Mrs. – Dr. (only) |
| T | Employee Security Level | 16 | up to 16 characters or numbers |
| U | Security Clearance Date | 10 | MM/DD/YYYY (slashes required) |
| V | Race | 25 | Must match a valid race on the detail tab. |
| W | EEO Category | 25 | Must match a valid category on the detail tab. |
| X | Sex M/F | 1 | M or F only |
| Y | Driver's License Number | 15 | up to 15 characters or numbers |
| Z | I9 Renewal Date | 10 | MM/DD/YYYY (slashes required) |
| AA | Veteran Status | 25 | Disabled - Vietnam Era - Other Veteran – |
| AB | Office Phone & Ext. | 30 | 800-123-4567 Ext. 123 |
| AC | Fax | 30 | 800-123-4567 |
| AD | Email address | 30 | up to 30 characters or numbers |
| AE | Address Effective Date | 10 | MM/DD/YYYY (slashes required) |

To import your file, follow these steps:

1. From within the program click **File, Import**.
2. Enter the path of the file you wish to import or click on the **Browse** button to navigate to it.
3. Select **Tab Delimited** or **Fixed Length**. This should correspond with the way the import file was saved.
4. Select **Skip First Line** if you have title headings. Do not select **Yes** if you don't have title headings or you'll lose the first line.
5. Click **Load File** to preview. At this point you should check that all column headings match the fields that will be imported.



Note the column titles above: **SSN**, **Lastname**, **Firstname**, and **Middlename**; check each column to make sure the appropriate data is in the correct column. For example, the SSN number should have an 11-digit number plus two hyphens.

6. Select which fields to check for duplicates in the **Check Duplicates** box. Duplicates will be checked during the Test File phase.
7. Click **Test File**. This checks for blank required fields, and in the case of Location and Department, it checks to make sure that the name of the Location and Department has already been set up within the program.
8. **CAUTION:** If duplicates were detected and you click on Import, these fields will be imported into the program. Once it passes the Test portion, you will be able to click on **Import File**.

Document URL:

Document for: ☐ Internal ☒ Public