



# Import Manual

HR for Dynamics

# Recommended Flow for Import

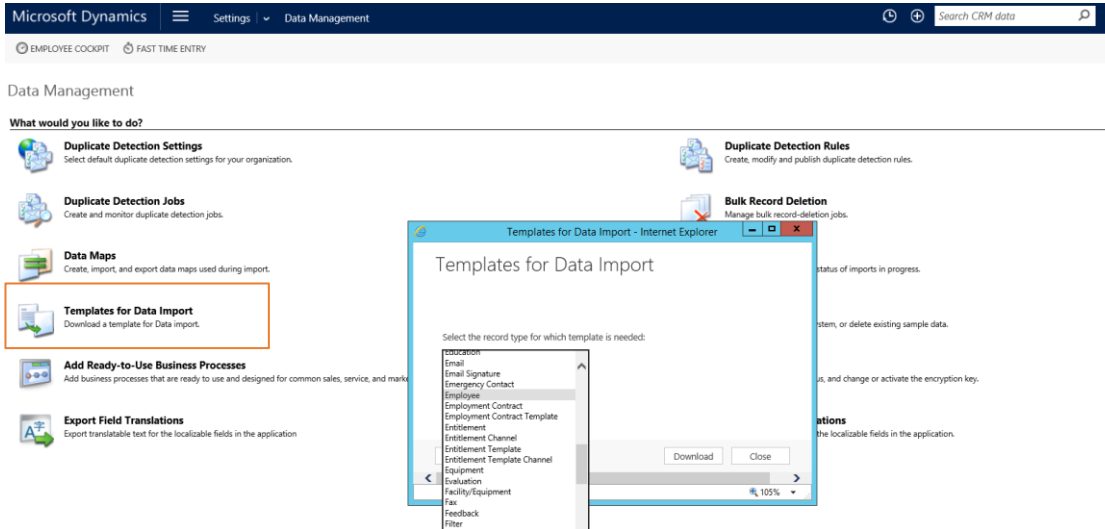
1. Import **Departments** using Import Template
2. Import **Areas** using Import Template
3. Import **Calendar & Calendar Entries**
4. Import **Insurances**
5. Import **Employees**
6. Adjust the Absence Type Settings
7. Create Employment Term Templates
8. Import **Employment Terms** using Import Template
9. Import **Wages**
10. Import **Skills** and **Skill Grades**
11. Import **Job Profiles**
12. Import **Equipment**



# Creating Import Templates

Each Import Template can be generated directly from the system. To do so, please open:

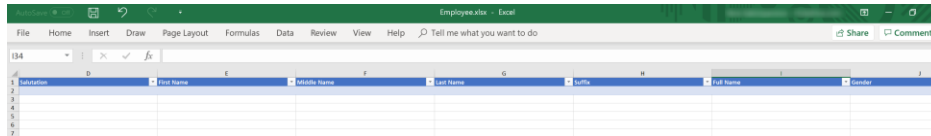
1. Settings > Data Management
2. Click on „Templates for Data Import“
3. A new window will open. Select the record type (entity) which you would like to import and click on „Download“.



# Prepare Import Templates

After downloading the import template, an Excel file will open.

1. Fill the table with the required data (see specific instructions for each import template).
2. Once you have filled the import template, save the changes on your local device.



# Upload Import Templates

## Option 1

Exclusive Benefits  
just for customers of HR for Dynamics



Time



Money



Safety



Convenience

familiar Outlook



einziges Passwort  
mehr merken



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with Outlook



Once all necessary data is in the template, you can start the import. Please open:

1. Settings> Data Management> Imports
2. Click on „Import Data“
3. A new Dialog opens. Select the finalized Excel File and click „Next“. Select „No“ for „Allow Duplicates“ and select the owner for the imported records. Then click on „Submit“ and then on „Finish“. The import will start automatically.

# Data import Option 1

The screenshot shows the Microsoft Dynamics CRM interface with the 'Data Management' tab selected. The 'IMPORT DATA' button in the top navigation bar is highlighted with an orange box. A dialog box titled 'Upload Data File' is open, containing the following elements:

- Title:** Upload Data File
- Instruction:** Select a data file to import into Microsoft Dynamics CRM.
- Data file name:** A text input field containing the path 'C:\Users\hmader\Desktop\Import Al...' and a search button 'Durchsuchen...'. Below the field, it lists supported file types: XML Spreadsheet 2003 (.xml), .csv, .txt, .xlsx, and .zip.
- Drop Zone:** A large dashed blue box with a cloud and arrow icon and the text 'Drag your file here'.
- Buttons:** 'Next' and 'Cancel' buttons at the bottom.

To the right of the dialog box, a 'Review Settings and Import Data' panel is visible, containing:

- Warning:** A yellow warning box stating 'This action will update existing records, and, if required, create new records.'
- Instruction:** Review the default settings, make the necessary changes, and submit the data for import.
- Allow Duplicates:** Radio buttons for 'No' (selected) and 'Yes'. A note states: 'Duplicate records will be determined based on the duplicate detection settings in Microsoft Dynamics CRM.'
- Select Owner for Imported Records:** A dropdown menu showing 'Hannelore Mader'.
- Text:** 'This user will own the imported records if the records do not contain owner information or if the records cannot be assigned to the specified owners.'

At the bottom right of the image, there are three buttons: 'Back', 'Submit', and 'Cancel'.

# Upload Import Templates

## Option 2

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There is a second option to upload the import templates. You can import them directly within the entity using excel import.

For example choose the employee entity on the left side in the HR Hub.

1. Click on „Import to excel“ in the ribbon
2. A new dialog opens on the right hand side. You can now upload the template. (In our example you can now upload the employee – template.) Click on Next and the import starts automatically.

# Data import Option 2

The screenshot displays the HR Hub interface. The top navigation bar includes options like 'Show Chart', '+ New', 'Delete', 'Refresh', 'Email a Link', 'Flow', 'Run Report', 'Excel Templates', 'Export to Excel', 'Import from Excel' (highlighted with a red box), and 'Create View'. The main content area shows a table titled 'Active Employees' with columns for 'Full Name', 'Business Phone', 'Email Address', 'Manager', and 'Department'. The left sidebar contains various navigation categories, with 'Administration' expanded and 'Employees' highlighted with a red box. The bottom status bar shows '1 - 14 of 14 (0) selected'.

Import from Excel ✕

File Upload  Keine Datei ausgewählt.



# Data import Option 2

Import from Excel

You're about to import Active Employees 25\_11\_2020 17-17-3... 7 KB

Duplicate Data Settings

Allow Duplicates  No

Back Review Mapping Finish Import

Import from Excel

You're about to import Active Employees 25\_11\_2020 17-17-... 7 KB

Map each column from your source file to an entity field in Dynamics 365.

Name Your Data Map  Delete

Map Attributes Show All

Primary Fields

HR Manager (Loo...  Not Mapped (Use Default)

Gender (OptionSet)  Not Mapped (Use Default)

Last Name  Not Mapped (Use Default)

Optional Fields

Source Fields	Dynamics 365 Entity Fields
Business Phone	Business Phone
Department	Department (Lookup)
Email Address	Email Address
Full Name	Full Name
Full Time Equival...	Full Time Equivalent
Manager	Manager (Lookup)

Back Finish Import

Import from Excel

You're about to import Active Employees 25\_11\_2020 17-17-... 7 KB

Map each column from your source file to an entity field in Dynamics 365.

Name Your Data Map  Delete

Map Attributes Show All

Primary Fields

HR Manager (Loo...  Not Mapped (Use Default)

Gender (OptionSet)  Not Mapped (Use Default)

Last Name  Not Mapped (Use Default)

Optional Fields

Source Fields	Dynamics 365 Entity Fields
Business Phone	Business Phone
Department	Department (Lookup)
Email Address	Email Address
Full Name	Full Name
Full Time Equival...	Full Time Equivalent
Manager	Ignore

Back Finish Import

This option allows to exclude certain lookup connections.

e.g. During the first import of employee data no Manager information is available.

With the second import this field can then be imported)

To avoid duplicates please do not import the same document twice but export the existing data and fill the information on the second form.

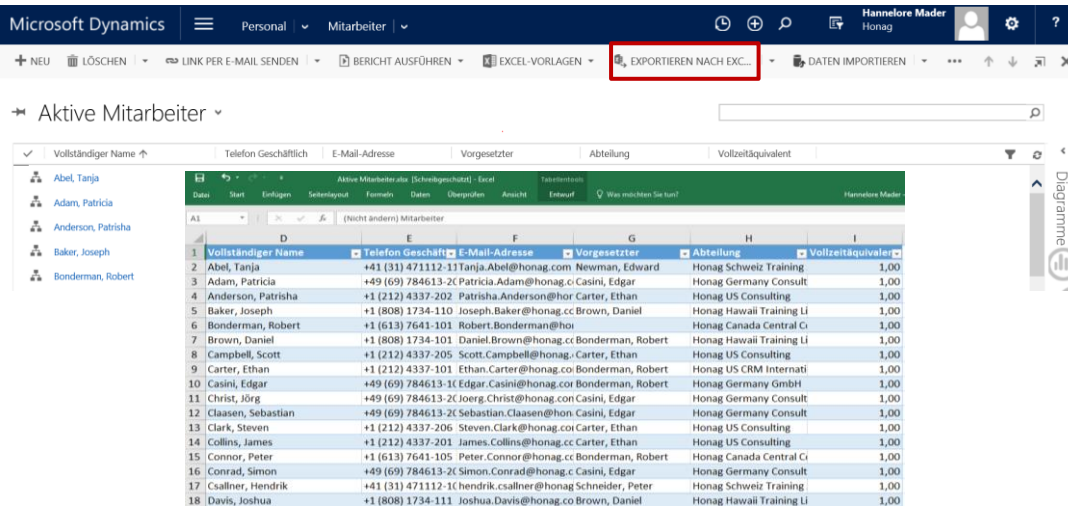
(Reason are the technical names in the columns A-C, they are empty during the first import)

# Export to Excel

In some steps it is required to use the existing data records. All existing records can be exported to Excel. Open the data list you would like to export and click on „Export to Excel“.

Note that using the Export to Excel option will export the data only for that view. If you need to export specific data set please see next page - [Updating and Supplementing Data sets](#).

Select „Static Worksheet“ to download the data. The required information can now be used further using the copy function.



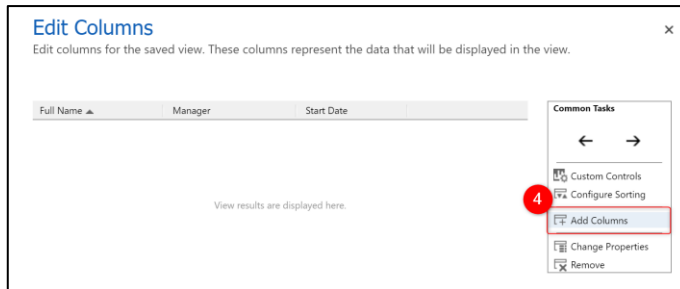
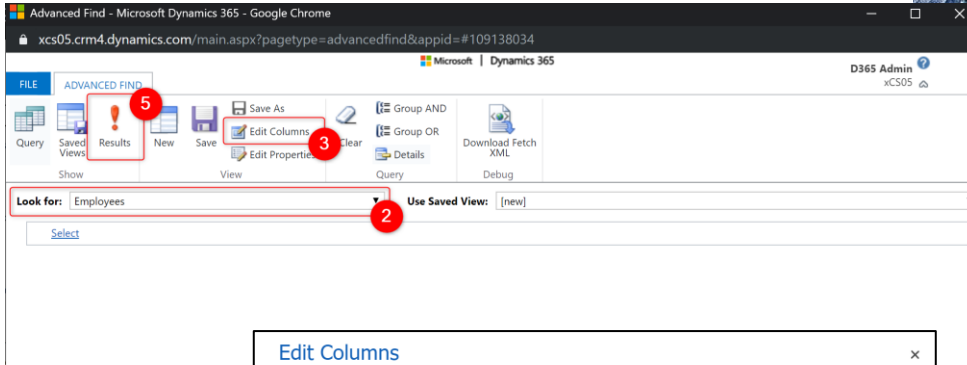
The screenshot shows the Microsoft Dynamics 365 user interface. The top navigation bar includes the user name 'Hannelore Mader' and the role 'Honag'. The main menu contains options like 'NEU', 'LÖSCHEN', 'LINK PER E-MAIL SENDEN', 'BERICHT AUSFÜHREN', 'EXCEL-VORLAGEN', 'EXPORTIEREN NACH EXCEL' (highlighted with a red box), and 'DATEN IMPORTIEREN'. Below the menu, the view is titled 'Aktive Mitarbeiter'. A list of employees is displayed with columns for 'Vollständiger Name', 'Telefon Geschäftlich', 'E-Mail-Adresse', 'Vorgesetzter', 'Abteilung', and 'Vollzeitäquivalent'. The data is as follows:

Vollständiger Name	Telefon Geschäftlich	E-Mail-Adresse	Vorgesetzter	Abteilung	Vollzeitäquivalent
Abel, Tanja	+41 (33) 471112-11	Tanja.Abel@honag.com	Newman, Edward	Honag Schweiz Training	1,00
Adam, Patricia	+49 (69) 784613-2	Patricia.Adam@honag.ch	Casini, Edgar	Honag Germany Consult	1,00
Anderson, Patrishia	+1 (212) 4337-202	Patrishia.Anderson@hoi	Carter, Ethan	Honag US Consulting	1,00
Baker, Joseph	+1 (808) 1734-110	Joseph.Baker@honag.cc	Brown, Daniel	Honag Hawaii Training Li	1,00
Bonderman, Robert	+1 (613) 7643-101	Robert.Bonderman@hoi		Honag Canada Central Ci	1,00
Brown, Daniel	+1 (808) 1734-101	Daniel.Brown@honag.cc	Bonderman, Robert	Honag Hawaii Training Li	1,00
Campbell, Scott	+1 (212) 4337-205	Scott.Campbell@honag.ch	Carter, Ethan	Honag US Consulting	1,00
Carter, Ethan	+1 (212) 4337-101	Ethan.Carter@honag.co	Bonderman, Robert	Honag US CRM Internati	1,00
Casini, Edgar	+49 (69) 784613-1	Edgar.Casini@honag.cor	Bonderman, Robert	Honag Germany GmbH	1,00
Christ, Jörg	+49 (69) 784613-2	Joerg.Christ@honag.con	Casini, Edgar	Honag Germany Consult	1,00
Claasen, Sebastian	+49 (69) 784613-2	Sebastian.Claasen@hon	Casini, Edgar	Honag Germany Consult	1,00
Clark, Steven	+1 (212) 4337-206	Steven.Clark@honag.coi	Carter, Ethan	Honag US Consulting	1,00
Collins, James	+1 (212) 4337-201	James.Collins@honag.cc	Carter, Ethan	Honag US Consulting	1,00
Connor, Peter	+1 (613) 7643-105	Peter.Connor@honag.co	Bonderman, Robert	Honag Canada Central Ci	1,00
Conrad, Simon	+49 (69) 784613-2	Simon.Conrad@honag.ch	Casini, Edgar	Honag Germany Consult	1,00
Csallner, Hendrik	+41 (33) 471112-1	hendrik.csallner@honag	Schneider, Peter	Honag Schweiz Training	1,00
Davis, Joshua	+1 (808) 1734-111	Joshua.Davis@honag.co	Brown, Daniel	Honag Hawaii Training Li	1,00



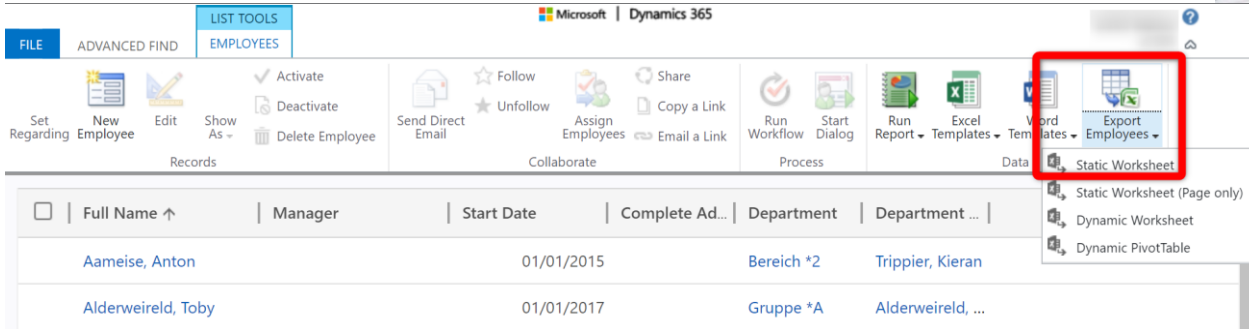
# Updating and Supplementing Data sets

To update existing records, open the advanced search (funnel icon in the navigation bar) and select the record type (entity) you want to update. Add any columns you want to update or fill. Then click on "Results". (Alternative is using Excel Online)



# Updating and Supplementing Data sets

Click on "Export employees" and select the static table.



The screenshot shows the Microsoft Dynamics 365 interface for the 'EMPLOYEES' entity. The 'LIST TOOLS' ribbon is active, and the 'Export Employees' option is highlighted with a red box. The 'Data' dropdown menu is open, showing options: 'Static Worksheet', 'Static Worksheet (Page only)', 'Dynamic Worksheet', and 'Dynamic PivotTable'. Below the ribbon, a table of employee records is visible.

Full Name ↑	Manager	Start Date	Complete Ad...	Department	Department ...
Aameise, Anton		01/01/2015		Bereich *2	Trippier, Kieran
Alderweireld, Toby		01/01/2017		Gruppe *A	Alderweireld, ...

Now you can make the changes to the data records. If you want to add new data records at the same time, simply add them to the next line. Make sure that the table formatting includes every record you want to import.

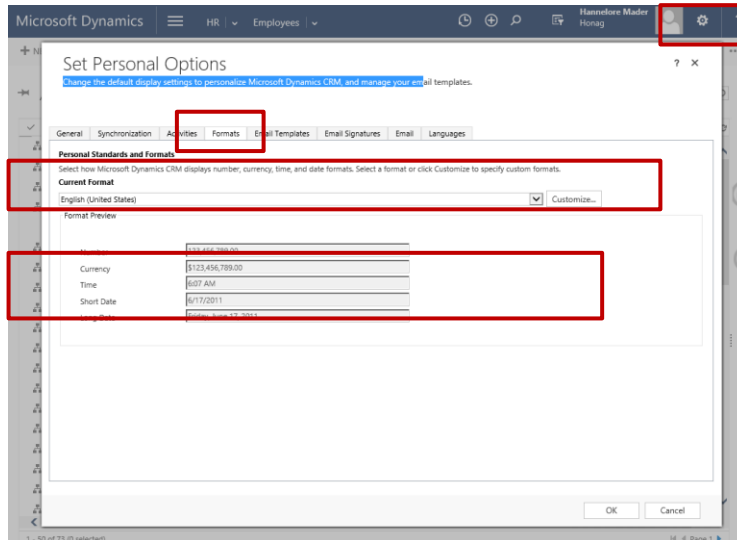


# Important when importing DATE fields

Due to a known Microsoft error, the following procedure is mandatory for importing date fields.

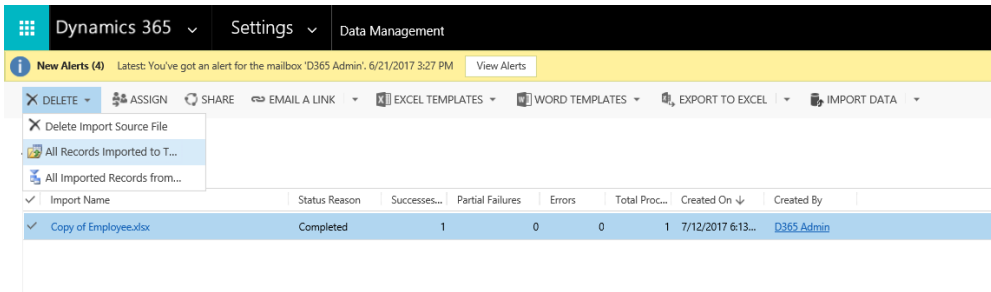
Before you start importing a date field (e.g. calendar entries), you must change the format to "English (United States)" in the options under Formats in your CRM settings (to the right of the user name).

Otherwise the import will not take place in the correct date format (day and month will be swapped).



# Deleting generated data records

You can delete records created during an import by selecting the import and clicking the arrow next to Delete. There you can select to delete all records created during the import.



The screenshot shows the Dynamics 365 interface. At the top, there's a navigation bar with 'Dynamics 365', 'Settings', and 'Data Management'. Below that, a yellow alert bar says 'New Alerts (4) Latest: You've got an alert for the mailbox 'D365 Admin', 6/21/2017 3:27 PM View Alerts'. A toolbar contains buttons for 'DELETE', 'ASSIGN', 'SHARE', 'EMAIL A LINK', 'EXCEL TEMPLATES', 'WORD TEMPLATES', 'EXPORT TO EXCEL', and 'IMPORT DATA'. A context menu is open over the 'DELETE' button, showing options: 'Delete Import Source File', 'All Records Imported to T...', and 'All Imported Records from...'. Below the menu is a table with columns: 'Import Name', 'Status Reason', 'Successes...', 'Partial Failures', 'Errors', 'Total Proc...', 'Created On', and 'Created By'. One record is visible: 'Copy of Employee.xlsx' with status 'Completed', 1 success, 0 partial failures, 0 errors, 1 total processed, and created on 7/12/2017 6:13... by D365 Admin.

Import Name	Status Reason	Successes...	Partial Failures	Errors	Total Proc...	Created On	Created By
Copy of Employee.xlsx	Completed	1	0	0	1	7/12/2017 6:13...	D365 Admin

