Import master data

General information

If a large number of employees is to be created, it would be relatively time-consuming to do this via the menu item Persons[1]. Therefore there is the possibility to enter the **master data** and all other relevant information concerning the persons to be created comfortably in a Microsoft Excel folder, from where they are finally read out and imported. The folder provided for this purpose is described below - each of its pages under the same heading.

> NOTIZ
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> The columns highlighted in red on the screenshots are mandatory fields - the yellow fields can be filled **optionally**.

The document

Employee master data

This page deals with the personal data of the employees and the assignment to **loose groups**.

Employee ID   Lastname   Firstname Title   User-ID OE   E-Mail   Date of birth Gender   Tel.   Fax Mobile phone Address

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	Personalnummer	Nachname	Vorname	Akad. Titel	User-ID	OE	Email	Geburtsdatum	Geschlecht	Telefon	Fax	Mobil	Adresse	PLZ	Stadt	Land	User	Management	Admin
	321654	Hartmann	Alexander		AleHar	XY-GF	alehar@XY.at	05.05.1975	männlich			0650 5588392	Wiener Hauptstraße 10/A/4/15	1014	Wien	Österreich	J	J	J
	789653	Hodi	Gerhard	Dr.	GerHod	XY-BAS	gerhold@XY.at	14.07.1959	männlich			0676 9282214	Sterzinger Straße 1	1136	Wien	Österreich	J	N	J
	963874	Schwarz	Erika	Mag.	EriSch	XY-PERS	erisch@XY.at	24.03.1968	weiblich			0660 3452818	Tullnerstraße 18	1142	Wien	Österreich	J	J	N
	359852	Seidl	Gunter		GunSei	xY-SUP	gunsei@XY.at	11.10.1980	männlich			0664 7692345	Zieherplatz 14/C/3/7	1162	Wien	Österreich	J	N	N

The following is an explanation of those columns that require such an explanation:

- **Employee ID**
  This refers to the personnel number assigned to the employee in the company.
- **User-ID**
  This is the user name under which the employee is to be created in Personalwolke. The user name can be any combination (in this case, the first 3 letters of the first and last names would be used).
- **OE - short for: organizational unit**
  This includes the various departments of the company, such as management (GF), personnel (PERS) etc. This column contains the short names of the relevant OU.
- **User / Management / Admin**
  In the Personalwolke these are the names of the 3 different *loose groups.* Depending on which of these groups the user is assigned to (Y = Yes, add / N = No, do not add), he or she receives different authorizations in the Personalwolke.

Organizational units

This page is used to define the hierarchical groups / departments and their relationships to each other.

Shortname   Name   Parent   Supervisor   Personnel

Kurzname	Name	Parent	Vorgesetzter	Personal
XY-GF	Geschäftsführung	ROOT	321654	963874
XY-BAS	Basis Services	XY-SUP	321654	963874
XY-PERS	Personal	XY-GF	963874	963874
XY-SUP	Support	XY-GF	963874	963874
...	...	...	<Personalnummer>	<Personalnummer>

- **Shortname**
  This consists of the fixed client abbreviation (XY) and a freely selectable abbreviation of the OU / department.

- **Name**
  The full name of the OU / department.

- **Parent**
  The **short name** entered here indicates which OU the department is subordinate to in the question. This allows a clear hierarchical order to be created. In the screenshot above, **root** is given for the *management* - this means that the management does not have a superior department, i.e. is at the top of the hierarchy.

- **Supervisor**
  Or even **department heads** - this includes the personnel number of the employee who holds this position in the company. It is important to ensure that it matches what was entered under **Person master data**.

- **Personnel**
  As with the supervisor, the correct personnel number of the person who has this **role** for the relevant department must also be specified here.

  > NOTIZ
  >
  > A definition of the roles **superior** and personnel is contained in the menu option Roles[2].

Daily program

Various working time models can be recorded here, depending on the structure of the company.

Number   *Short text Designation*   *Validity TP Start*   *Validity TP End*

Nummer	Kurztext	Bezeichnung	Gültigkeit TP Beginn	Gültigkeit TP Ende	Rahmen Beginn	Rahmen Ende	Normalarbeitszeit Beginn	Normalarbeitszeit Ende	Kernzeit Beginn	Kernzeit Ende	Tagessoll
1	G/7,42	Glz/7,42/7:00-18:00/Mo-Fr	00:00	24:00:00	07:00	18:00	08:00	16:42	09:30	16:00	07:42
2	G/0	Glz/0/-/Sa,So,Fe	00:00	24:00:00	07:00	14:00					00:00

- **Number**
  The **daily programs** must be clearly numbered - these numbers can also be used to enter them on the **Weekly Programs** page.

- **Short text**
  A freely selectable short name for the day program. In the above case, **G/7.42** stands for a flexitime model (Gleitzeitmodell) with a daily target of **7 hours** and **42 minutes**.

- **Designation**
  As shown in the screenshot, the long name of the program could be chosen to contain the most important information.

- **Validity TP Start / End**
  This is the period in which the daily schedule is valid. Shift models are an exception to the normal case (00:00 - 24:00), since night shifts can extend from late evening to long after midnight.

- **Daily target**
  The daily target working time mentioned above specifies the number of working hours that an employee must work each day (on average) in order to achieve his or her weekly target.

Weekly program

The **weekly program** determines which **daily program** is used on which day of the week.

Short text	Long text	Mon	Tue	Wed	Thu	Fri	Sat	Sun	max. weekly working hours

Kurtext	Langtext	Mo	Di	Mi	Do	Fr	Sa	So	Wöchentliche Höchstarbeistzeit
Glz/38,3	Glz/38,3/7:00-18:00	1	1	1	1	1	2	2	50,00

- **Short text**
  A freely selectable short name for the week program. In the above case, **G/38.3** stands for a flexitime model (Gleitzeitmodell), with a weekly working time of **38.3 hours** and a framework time between 07:00 and 18:00 hours.

- **Long text**
  As shown in the screenshot, the long name of the program could be chosen to contain the most important information.

- **Mon -Sun**
  The number of the applicable **day program** is entered under the respective short names of the weekdays (Mon - Sun).

1. /daisy/personalwolke-default/5928-dsy.html?language=4

2. /daisy/personalwolke-default/5886-dsy.html?language=4