

Importing Vacation Data from HR to PlanMill system

User Guide

Version 1.0

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1. Step-by-step guide in importing vacation data

Importing Vacation Data from HR Systems to PlanMill allows you to save time by eliminating repetitive entries of similar information from source documents to the PlanMill system. This guide aims to show how PlanMill makes use of the Import functions and shows the user a summary page, which can be found through the Earned Vacations screen.

Note: Holiday information for the same year should not be run again for the same person before the old information is removed.

Step 1: The user must have rights to the data import feature

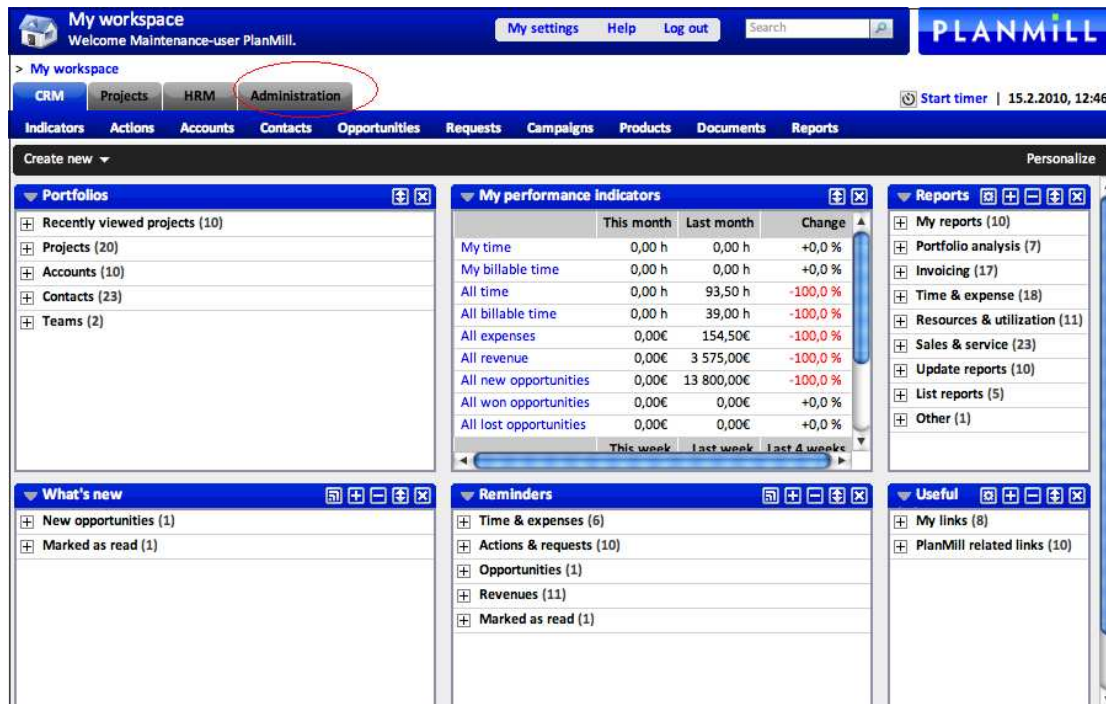


Figure 1. User rights to the data import feature

Step 2: Select the desired data import and edit the default values

The **Data Import** section lists all the possible options for data import (in this case just leave titles or headings away). Select **Edit** to get to set the default values for the imported data.

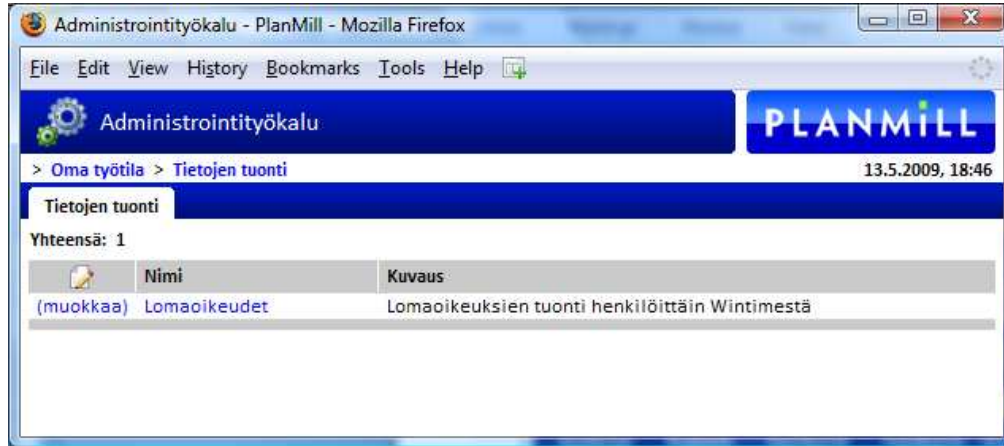


Figure 2. Selecting data import and editing the default values

Step 3: Enter the default value of the desired fields

In this holiday for the year 2005, enter the value in all the rows, if the value does not change the file to be administered). Finally, select "Save".

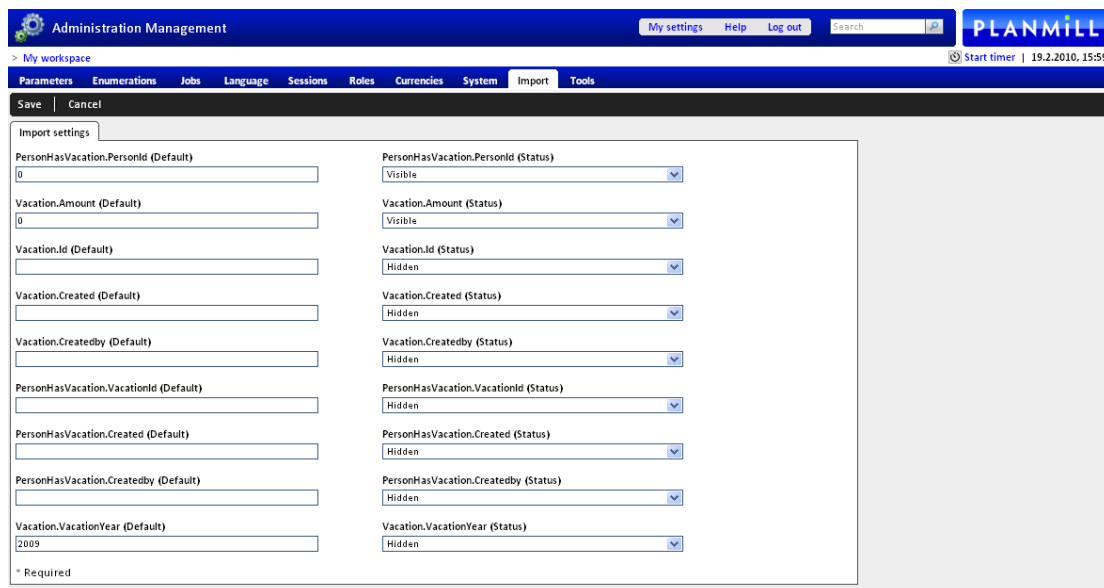


Figure 3. Entering the default value of the desired fields

Step 4: Retain and save data in text file format before storing in PlanMill database

The import file must contain exact fields and separators, as defined in the original definition of the data to import. Finally, select **Import Data**.

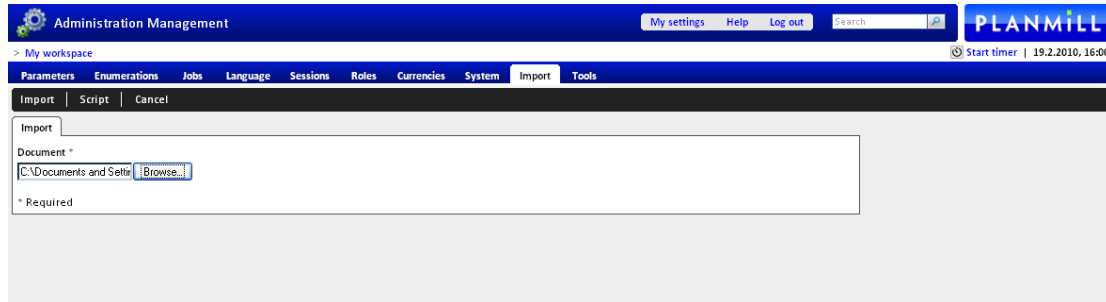


Figure 4. Retaining and saving data in text file format before storing in PlanMill database

Step 5: Check to make sure there are no errors in the database

If there are errors in the import process, incorrect data rows are displayed as they were in the original text file, in addition to showing the line numbers.

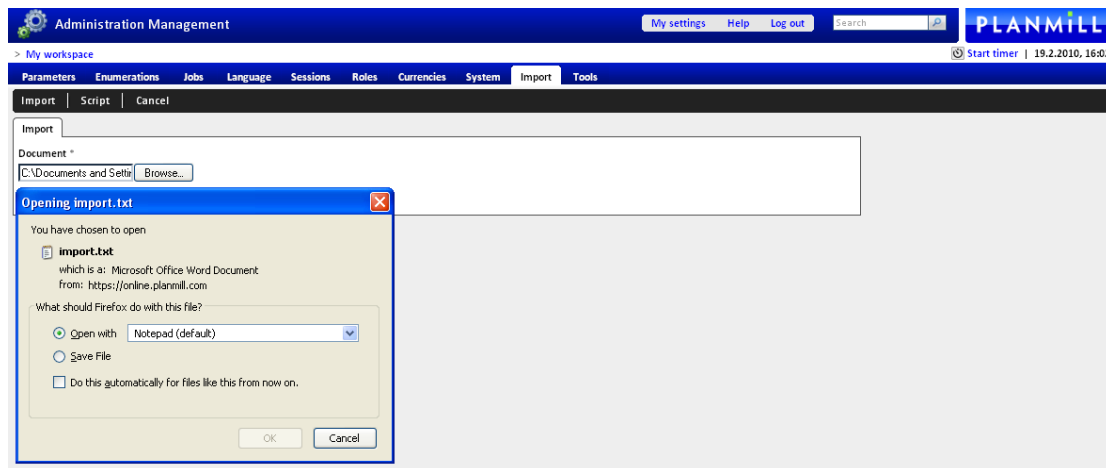


Figure 5. Checking to ensure there are no errors in the database

Under exceptional circumstances, it may also display one of the more technical error, indicated by the "Oops" text and the error message (for example, if a file has a the future value exceeding the allowable length of the database, a text displays what is assumed and the fields that are the actual permissible length.

Oops, something went wrong...



```
java.lang.ArrayIndexOutOfBoundsException: null (row:2, index:9,
data:'_ _* " "\ \ _ _ _')
```

[Click here to go back](#)

[Return to workspace](#)

Email the report below (select all -> copy -> paste) to bug@planmill.com if the error persists. Please, remember to comment!

```
----- My comments -----
My comments...
----- End -----
https://online.planmill.com/versiontest/administration/PMImport
/importupload.jsp
```

Figure 6. Displaying one technical error indicated by the "Oops" text

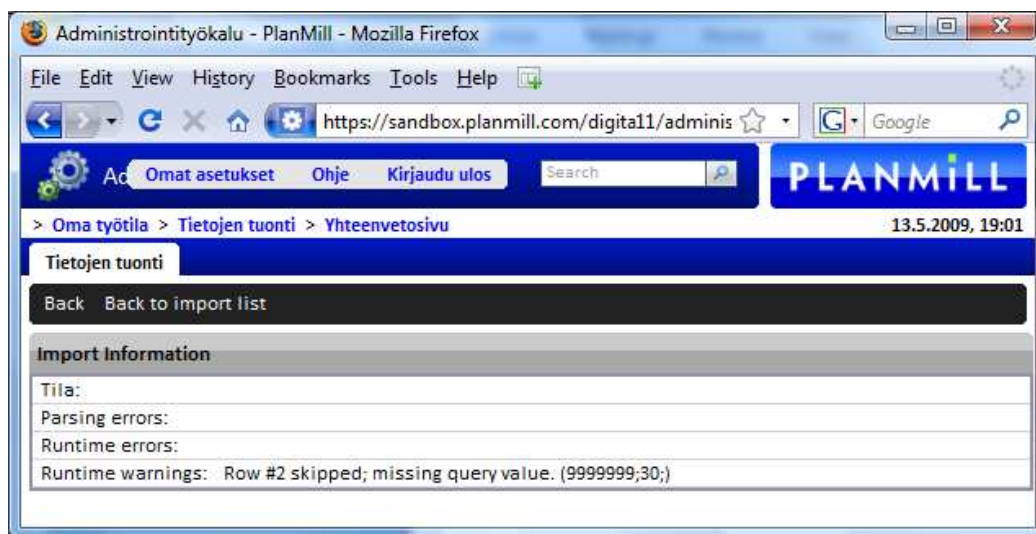


Figure 7. Displaying one technical error indicated the error message

2. Glossary

Accounts	Each contact belongs to an account. All the users are also shown on the contacts tab. Contacts can be linked to actions, requests, campaigns, and so on. Accounts are typically companies that are potential customers (prospects) or existing customers.
Contacts	Store information about your partners, affiliates, suppliers, and other relevant details. Enjoy quick access to all critical account data, including a company overview, key sales data, relevant documents, partners involved in the account, and more.
Holiday	Refers to Data related to Vacations and Leaves in the HRM systems that can be imported to the PlanMill system using Import function. Holiday information can also be entered in the PlanMill absence management system.
Project	Refers to specific tasks assigned to one or more performers as an assignment. A request has to be related to a project. Project requests are also related to contacts and partners. Time can be reported for each project and can be entered by the performer(s) after each request. A competence bound to a billable request is based on a project's price list. Each project contains different price types.
Request	A request is a wish or requirement attached to a certain project as a task and optionally to one or more performers. For each performer, an assignment is created. A request can be related to contacts, projects requests and partners. Time can be reported for the requests by the performers.
Task	A task is attached to a certain project assigned to one or more performers.
Users	Refers to all the persons or employees in the company listed in the HR database, which for example, can report time using Time sheet or Timer.
Contacts	Store information about your partners, affiliates, suppliers, and other relevant details. Enjoy quick access to all critical account data, including a company overview, key sales data, relevant documents, partners involved in the account, and more.
Work Schedules	Used commonly by the Resource & Project Manager for tracking tasks, requests and their deadlines and shows assignments and performers assigned to the tasks. In PlanMill Time Reporting, this is useful for checking current resources for the company during multiple projects.
Workspace	Also called My Workspace , this is the PlanMill dashboard where users can customize screen layouts from different readymade options and can add frames, gadgets, and widgets.
Power User	Refers to person(s) with corresponding access rights as a power user, and can for example view all absences and accept interruptions in absence request. Power User also refers to the system roles of a person with corresponding access rights to the PlanMill system as a whole.
Users	Refers to all the persons or employees in the company listed in the HR database, which for example, can perform general actions within the PlanMill Absence system.