



# Community Feature Guide

## Agent Import from Excel

For Community Software Version 4.x/5.x

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3400 Waterview Parkway, Suite 101  
Richardson, Texas 75080

phone 877-668-6870  
web [CommunityWFM.com](http://CommunityWFM.com)

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## About this Document


The objective of this document is to describe how to import agents into Community via an Excel spreadsheet. This guide will review each step of the process for Community Essentials and Enterprise.


## Introduction


There are three ways to add agents to Community Essentials and Enterprise.

1. Add each agent manually in the People hub (see Quick Start Guide).
2. Import agents from your data source.
3. Import agents from an Excel spreadsheet.

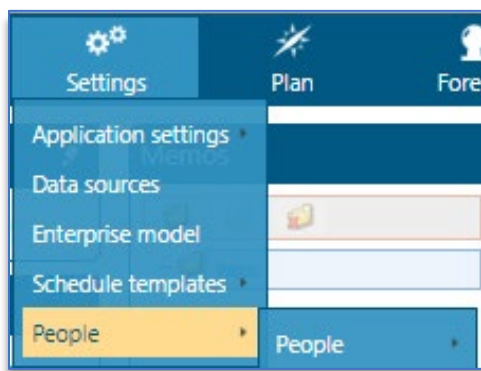
This guide demonstrates how to use an Excel spreadsheet to import data from your external systems.

 This guide assumes you have set up some structure of the Enterprise model, including sites and work types.

 Community **Essentials** already defines the Enterprise Model and Work Types.

 Community **Enterprise** users should wait to use this process until after the initial training sessions when the Enterprise Model and Work Types are defined.

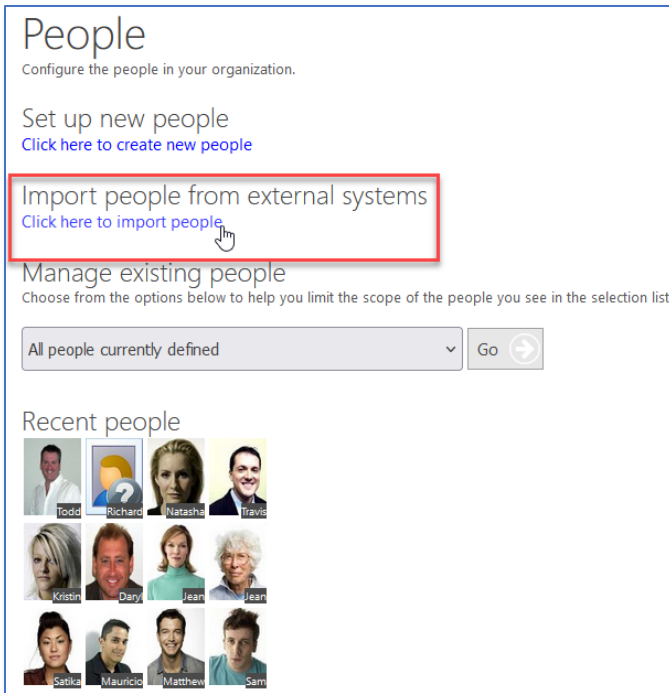
## Getting Started



**Essentials:** Go to Settings | People | People

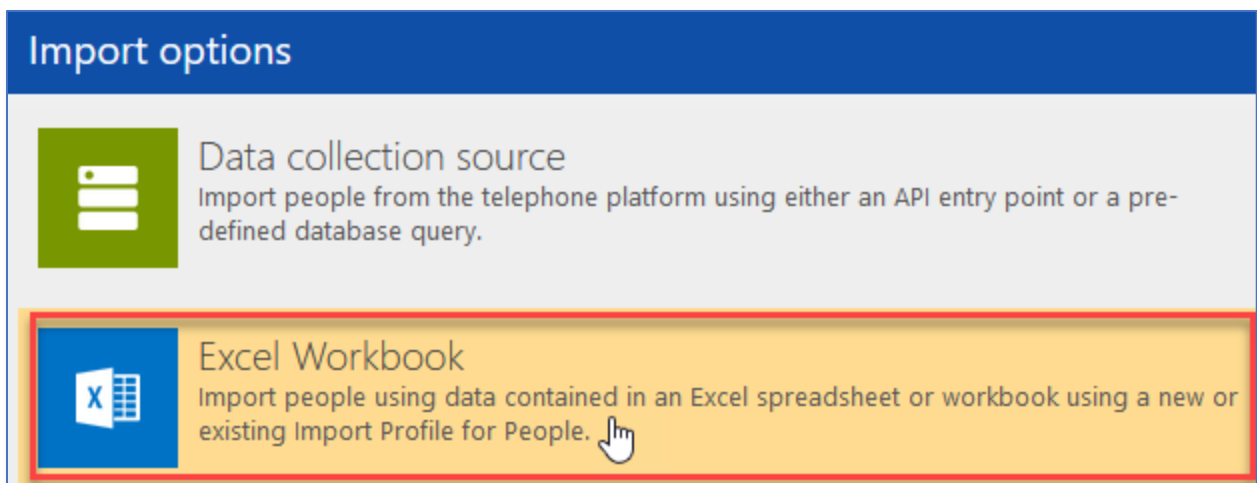
**Enterprise:** Go to Settings | People and agent templates | People.

On the People page, select *Click here to import people*.




## Import Options

Select *Excel Workbook* to launch the Excel Import Wizard.



## Step 1: Import defaults and select import file





### Import people from an Excel file

Step 1: Import defaults and select import file

Assigned site:

Assigned work type:

Choose the import file location

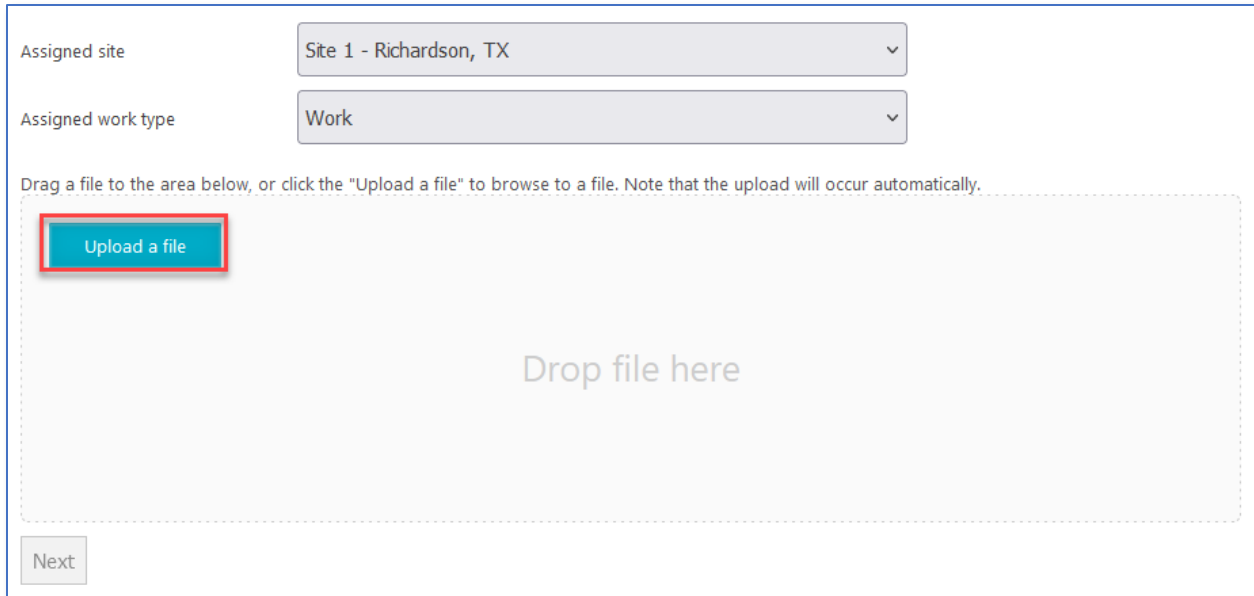
-  **Upload a new file**  
Select an Excel file on your local hard disk and upload it to the application server. You can then use the contents of this file to import selected people.
-  **Select an existing import file**  
Choose from the list of existing Excel files that were previously uploaded to the application server. Once you pick a file, you can then use the contents of it to import selected people.

Don't have a file to upload? Download the template here.  
[Click here to download the sample Excel import template.](#)

All agents entered to Community WFM must have an assigned site and work type, among other properties. Before selecting a file for import, select a site and work type from the drop-down menus.

Community **Essentials** has one named site and three work types to choose from (E-mail Work, Overtime, and Work). *Work* is typically used for regular contact center phone work. Community **Enterprise** needs to have the Enterprise Model and work types defined before moving forward.

Next, upload a new Excel file or select a previously uploaded file. If this is the first time through the Wizard, Click *Upload a new file* or drag and drop a file into the window. The upload will start automatically.



Assigned site Site 1 - Richardson, TX

Assigned work type Work

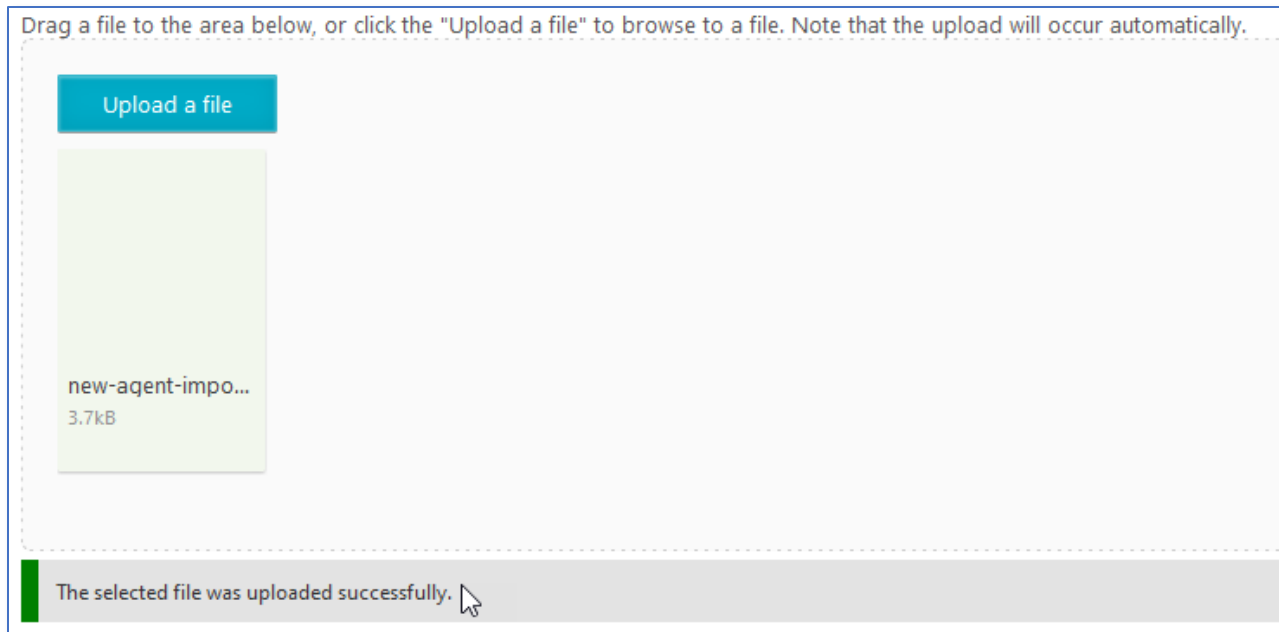
Drag a file to the area below, or click the "Upload a file" to browse to a file. Note that the upload will occur automatically.

Upload a file

Drop file here

Next

After uploading a file, you will see a confirmation that it was uploaded successfully.



Drag a file to the area below, or click the "Upload a file" to browse to a file. Note that the upload will occur automatically.

Upload a file

new-aqent-impo...  
3.7kB

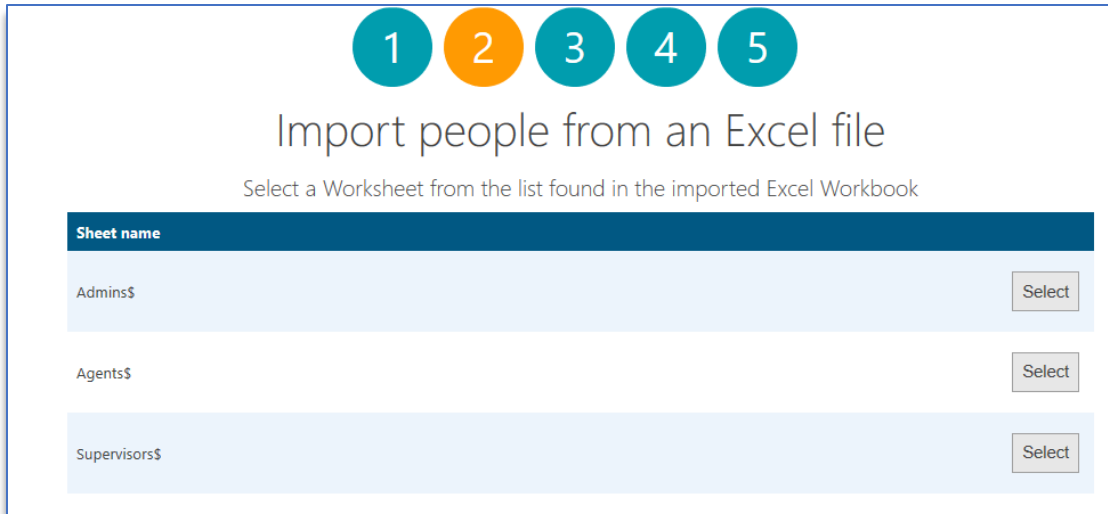
The selected file was uploaded successfully.

The file remains on the server. If you have previously uploaded files, you have the option to *Select an existing import file* and chose a file from the drop-down list.

After uploading a file or selecting an existing one, click *Next* to proceed to Step 2 of the wizard:  
*Select a Worksheet from the list found in the imported Excel Workbook.*

## Step 2: Select a Worksheet

The workbook example below contains worksheets labeled "Admins," "Agents," and "Supervisors."



1 2 3 4 5

### Import people from an Excel file

Select a Worksheet from the list found in the imported Excel Workbook

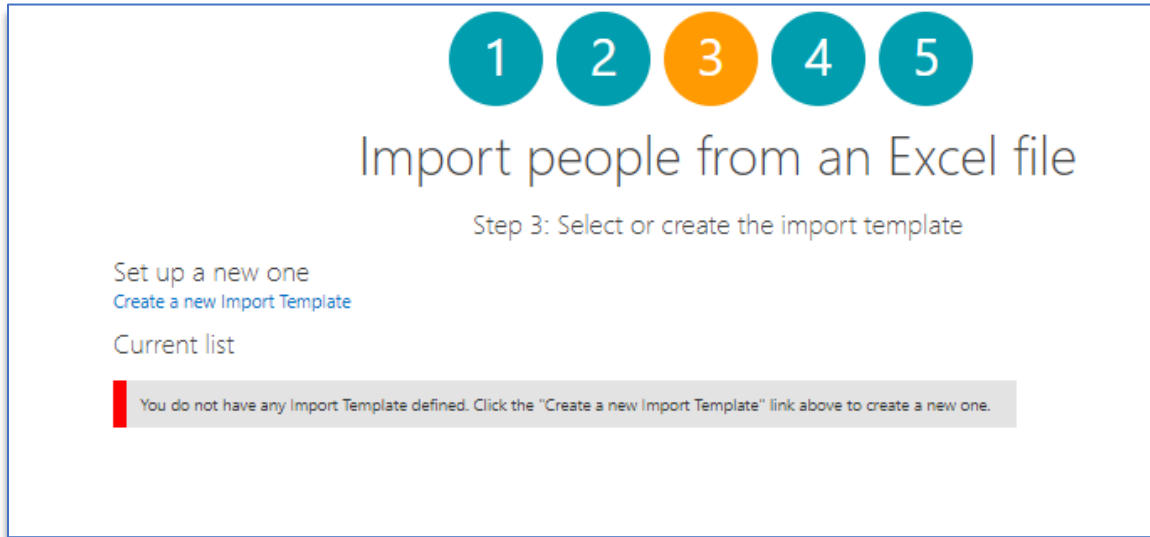
Sheet name	
Admins\$	Select
Agents\$	Select
Supervisors\$	Select

**Note:** All worksheet names have a dollar sign (\$) appended to the end. Do not be concerned.

Click *Select* next to the sheet that contains people data you wish to import to advance to Step 3:  
*Select or create the import template.*

## Step 3: Select or create the import template

Import templates are data maps where you can match columns from the imported worksheet to various people attribute fields needed by Community. If you have an Import Template defined select an existing Import template or click *Create a new Import Template* to create a new one.



1 2 3 4 5

### Import people from an Excel file

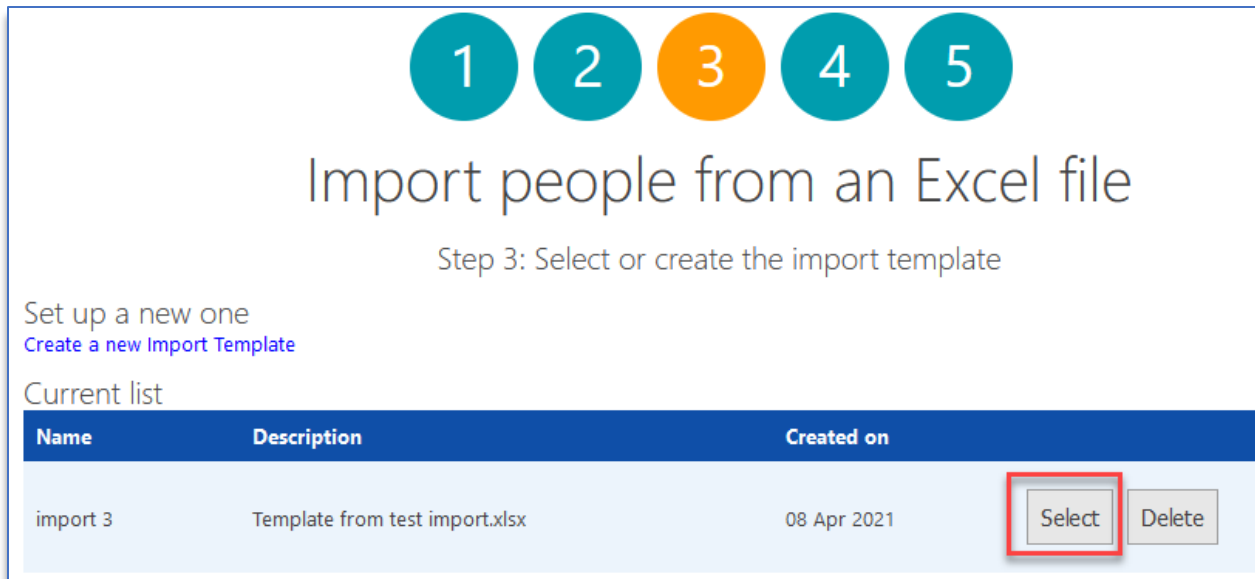
Step 3: Select or create the import template

Set up a new one  
[Create a new Import Template](#)

Current list

You do not have any Import Template defined. Click the "Create a new Import Template" link above to create a new one.

If you already have a template, click *Select* next to the Import name.



1 2 3 4 5

### Import people from an Excel file

Step 3: Select or create the import template

Set up a new one  
[Create a new Import Template](#)

Current list

Name	Description	Created on	
import 3	Template from test import.xlsx	08 Apr 2021	<input type="button" value="Select"/> <input type="button" value="Delete"/>

## Setting up a new Import Template

Click *Create a new Import Template*. This shows the column names and matching field names.

### New import template

Selected file:

Import template name:

Selected sheet:

Field name	Required?	Type	Selected column
First Name	true	Text	<input type="text" value="First Name"/>
Last Name	true	Text	<input type="text" value="Last Name"/>
Middle Initial	false	Text	<input type="text" value="-- Ignore this field --"/>
Title	false	Text	<input type="text" value="-- Ignore this field --"/>
Email Address	false	Text	<input type="text" value="Email Address"/>
Supervisor First Name	false	Text	<input type="text" value="Supervisor First Name"/>
Supervisor Last Name	false	Text	<input type="text" value="Supervisor Last Name"/>
Login Id	false	Text	<input type="text" value="Login Id"/>
Tiebreak	false	Integer	<input type="text" value="Tiebreak"/>
Role	true	Text	<input type="text" value="Role"/>
Hire Date	true	Date	<input type="text" value="Hire Date"/>
Employee Id	false	Text	<input type="text" value="Employee Id"/>

For each attribute, use the corresponding dropdown list to select a column name from the imported worksheet that contains the matching data. **Note:** *First Name*, *Last Name*, *Hire date*, *Role*, and *Tiebreak value* are required. If using advanced vacation features in Enterprise edition, a unique employee ID is required.




**Pro tip:** upload supervisors first, then you can import agents and indicate their supervisors. You can only indicate supervisors who are already in the system at the time of the agent import.

If you do not want to select a corresponding field, select --Ignore this field--.

When finished, click *OK*.

Community's import process requires validation of each row to create quality information for agents in the application.

Select the newly created template and proceed to step 4 of the Wizard.



## Import people from an Excel file

Step 4: Verify and import

Status	First name	Last name	Title	Email address	Hire date	Supervisor	
<span style="color: red;">✘</span>	Susan	Garcia	Agent	SG@work	06 Jan 2018	Timmons, Susan	<input type="button" value="Import"/>
A person with the same first and last name already exists in the system. Please ensure that you don't already have this person defined.							
<span style="color: green;">✔</span>	Greg	Koviak	Agent	GK@work	07 Jan 2018	Timmons, Susan	<input type="button" value="Import"/>
The imported row appears to be a valid user.							
<span style="color: green;">✔</span>	Katy	Garcia	Agent	KG@work	08 Jan 2018	Timmons, Susan	<input type="button" value="Import"/>
The imported row appears to be a valid user.							
<span style="color: green;">✔</span>	Lauren	Timmons	Agent	LT@work	09 Jan 2018	Timmons, Susan	<input type="button" value="Import"/>
The imported row appears to be a valid user.							
<span style="color: green;">✔</span>	Annie	Noll	Agent	AN@work	10 Jan 2018	Timmons, Susan	<input type="button" value="Import"/>
The imported row appears to be a valid user.							
<span style="color: green;">✔</span>	Harrison	Bratton	Agent	HB@work	11 Jan 2018	Timmons, Susan	<input type="button" value="Import"/>
The imported row appears to be a valid user.							
<span style="color: green;">✔</span>	Tim	James	Agent	TJ@work	13 Jan 2018	Timmons, Susan	<input type="button" value="Import"/>
The imported row appears to be a valid user.							
<span style="color: red;">✘</span>	Susan	Garcia	Agent	SG@work	06 Jan 2018	N/A	<input type="button" value="Import"/>
Invalid or missing value for supervisor First or Last Name: assuming no supervisor. Invalid or missing value for Employee ID: assuming no Employee ID. A person with the same first and last name already exists in the system. Please ensure that you don't already have this person defined.							

## Step 4: Verify and import: Data Validation

On the next screen you will see the results of the validation process, which eliminates invalid rows and alerts you of any potential conflicts.



If the row's status icon is a checkmark, it is entirely valid and there are no problems.

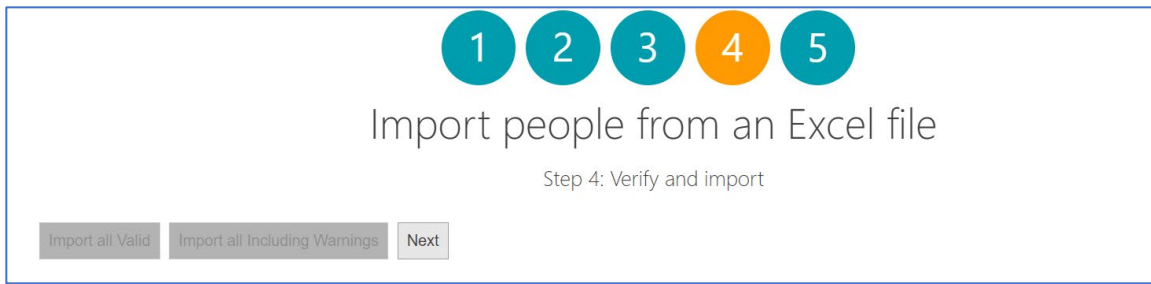


Some records (person) show a warning red X, meaning the row did not contain a required value for one of the fields. You cannot import this person.



If there is a missing value, there is a yellow warning X. People may be imported with a warning label and you can complete missing information later.

Next, import people either individually by clicking *Import* on the right side of each row, or bulk import by choosing *Import all Valid* (just those with the valid icon), or *Import all Including Warnings* (all valid and with warning icons) then select *Next*.



## Step 5: Review of import results

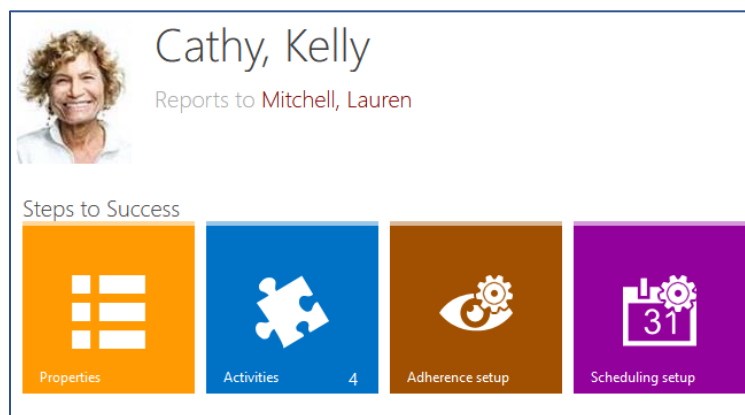
The final step of the wizard is to review the results.

When you click *Finish* at the bottom, all people are imported. Navigate back to the People page, and you will see all of the added people.



Id	Full name	Title	Email address	Hire date	Role
599	Garcia, Susan E	Agent	SG@work	06 Jan 2018	Agent
600	Kovlak, Greg J	Agent	GK@work	07 Jan 2018	Agent
601	Timmons, Lauren N	Agent	LT@work	09 Jan 2018	Agent
602	James, Tim L	Agent	TJ@work	13 Jan 2018	Agent
603	Garcia, Susan E	Agent	SG@work	06 Jan 2018	Agent
604	Noll, Annie E	Agent	AN@work	10 Jan 2018	Agent
605	Garcia, Katy M	Agent	KG@work	08 Jan 2018	Agent
606	Bratton, Harrison J	Agent	HB@work	11 Jan 2018	Agent

Clicking on a name leads to a screen where you can continue to build properties, activities, adherence set up, and schedule setup for that agent.




**Cathy, Kelly**  
Reports to Mitchell, Lauren

Steps to Success

- Properties
- Activities 4
- Adherence setup
- Scheduling setup

## Excel Template

If needed, you can download a copy of an Excel Workbook template in Step 1 of the wizard.




### Import people from an Excel file

Step 1: Import defaults and select import file

Assigned site:


Assigned work type:

Choose the import file location



**Upload a new file**

Select an Excel file on your local hard disk and upload it to the application server. You can then use the contents of this file to import selected people.



**Select an existing import file**

Choose from the list of existing Excel files that were previously uploaded to the application server. Once you pick a file, you can then use the contents of it to import selected people.

Don't have a file to upload? [Download the template here.](#)  
[Click here to download the sample Excel import template.](#)

1	A	B	C	D	E	F	G	H	I	J
1	First Name	Last Name	Middle Initial	Title	Email Address	Supervisor First Name	Supervisor Last Name	login Id	Tiebreak	Role
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
20										
21										
22										
23										
24										

Required fields are:

- First name
- Last name
- Hire date
- Role

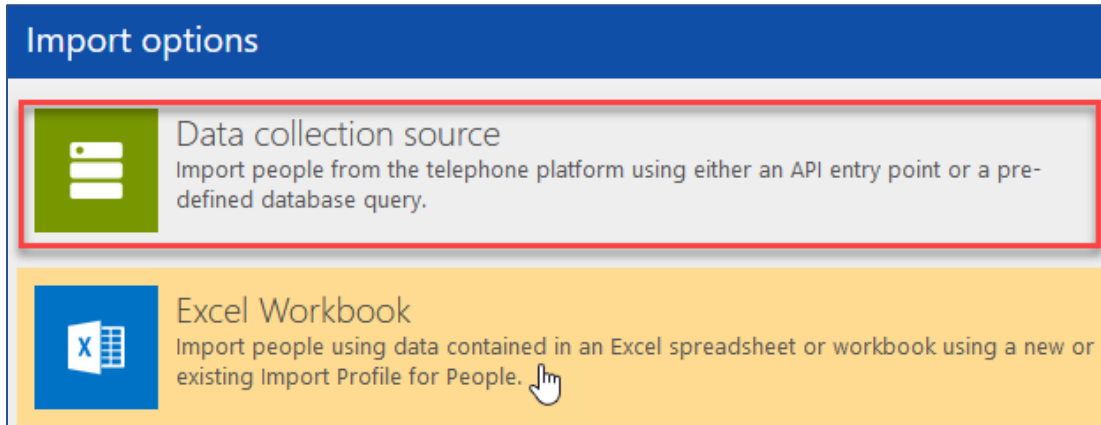
## Import agent: field names and descriptions

Field	Required?	Expected type & Description
First Name	Yes	String (50 characters) If missing, then the validator ignores the row
Last Name	Yes	String (50 characters) If missing, then the validator ignores the row
Middle Initial	No	String (1 character)
Title	No	String (255 characters)
Email Address	No	String (255 characters)
Supervisor First Name	No	String (50 characters)
Supervisor Last Name	No	String (50 characters)
Login ID	No	String (50 characters). Note <a href="#">the Login ID</a> must be UNIQUE across the population of people (users). If not, the validator will mark the row as in error.
Tiebreak	No	Integer; this is the tiebreak value used in various contexts including seniority scheduling
Hire date	Yes	Date This is the hire date for the person; if error then the validator assumes today's date.
Role	Yes	String (max 20 characters) This is the text version of these specific supported roles, including "Agent", "Supervisor", "Scheduler", "Administrator", "Superuser" If missing, or left blank, the validator assumes the "Agent" role.
Employee ID	No	String (50 characters)

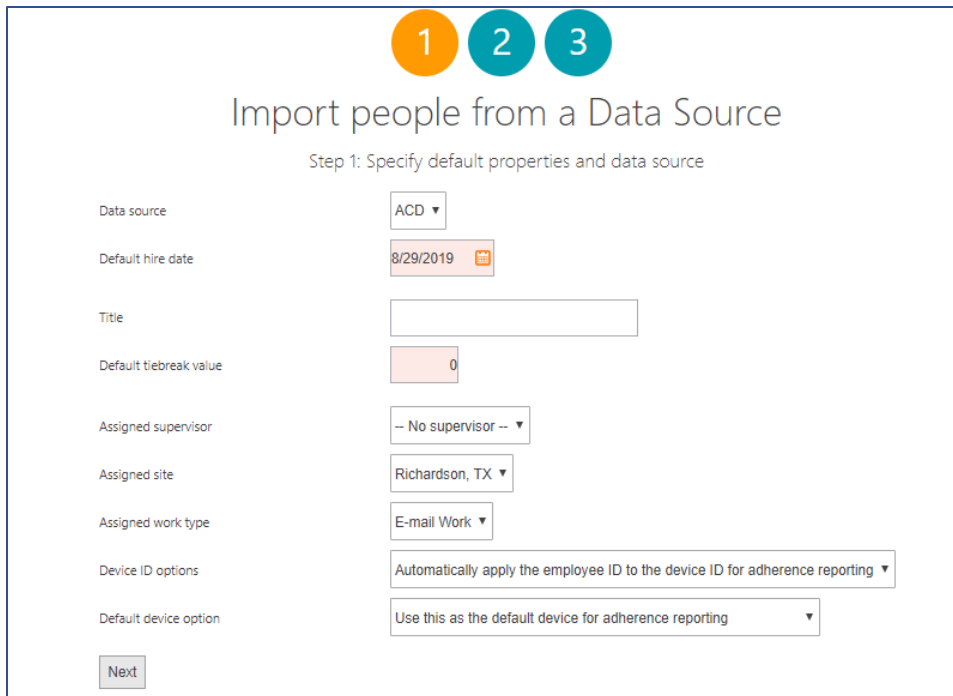
## Importing People from a Data Source

In addition to importing with Excel, you can import people from your data collection source.

Select *Data Collection source* from Import Options.



### Step 1: Specify default properties and data source



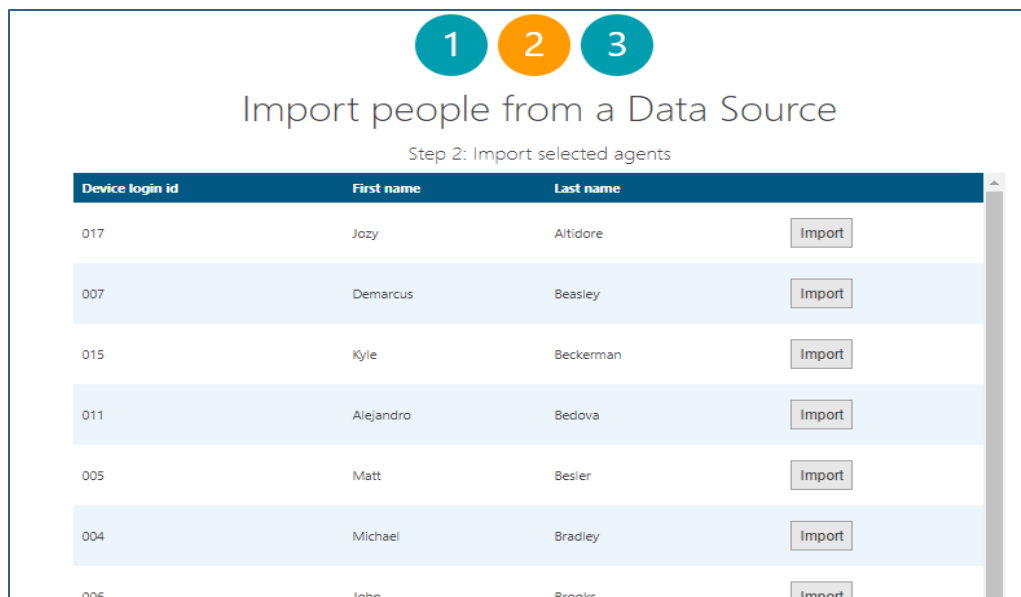
The screenshot shows a web form titled "Import people from a Data Source" with a sub-header "Step 1: Specify default properties and data source". At the top, there are three numbered circles: 1 (orange), 2 (teal), and 3 (teal). The form fields are as follows:

- Data source: ACD (dropdown)
- Default hire date: 8/29/2019 (calendar icon)
- Title: (empty text box)
- Default tiebreak value: 0 (text box)
- Assigned supervisor: -- No supervisor -- (dropdown)
- Assigned site: Richardson, TX (dropdown)
- Assigned work type: E-mail Work (dropdown)
- Device ID options: Automatically apply the employee ID to the device ID for adherence reporting (dropdown)
- Default device option: Use this as the default device for adherence reporting (dropdown)

A "Next" button is located at the bottom left of the form.

Select defaults for the following attributes, then click *Next*.

- Data source
- Default hire date (required)
- Title
- Default tiebreak value (required)
- Assigned supervisor
- Assigned site
- Assigned work type
- Device ID options
- Default device option



## Step 2: Import selected agents

Review the agents that can be imported. You can import agents one at a time or import all.

After importing, navigate back to the People page, and you will see all of the added people.