Data File Import

PCRecruiter allows you to import Company, Name and Position (limited) data from a .zip, .mdb, .txt, or .csv file. The import utility will allow you to add a group of records to your database and place them all on a Rollup List at the time of import.

The "Data Transfer" security option on your User Record must include ‘Import’ to be able to import files.

Accepted File Types

The Generic Mapper/Importer is a utility for importing data from Comma Separated Values (.csv), Tab Delimited (.txt), or Microsoft Access Database (.mdb) files into the PCRecruiter Web application.

If your data is in Excel (.xlsx) format, open the file in Excel and use the "Save As" option from the File menu to save the data in Comma Delimited (.csv) or Tab Delimited (.txt) format.

NOTE: The character limit for importing CSV data is 255 characters. If you are importing long-form content such as Job Description HTML or Keywords, you must use a Microsoft Access (.mdb) file or these items will be truncated to 255 characters.

If your data is stored in an Access .mdb file (which may contain several tables), you **must** create one column to serve as the primary key column containing a unique value. You will then link this column to the Key field when mapping between tables.

Data files up to 5MB in size can be uploaded. You may want to zip the file or break the file into smaller pieces to keep with the size limitations. Contact your Main Sequence Technologies representative to arrange for a larger data import.

Linking Imported Names & Companies

When importing a file containing company and name data (i.e. a list of companies with contacts), MST recommends importing the company data to a Company Rollup, then importing the name data to a

Name Rollup. This will allow you to map your data to the appropriate fields to create detailed company records, avoid creating duplicate records, and associate the names to the appropriate company record.

To further explain, when you import the company information to a Company Rollup, you will be presented fields for *Company* records to which you can map the data, such as address, phone number, keywords, notes, industry, etc. Once the companies are imported, you then import the name related columns to a Name Rollup and you will be presented fields for *Name* record to which you can map the data, such as First Name, Last Name, Title, Email Address, etc. Additionally, you will have options for mapping to #Company Name, #Company City, #Company State, and #Company Phone, which allows PCRecruiter to associate the incoming names to the appropriate company record.

When importing names with limited company information, you can accomplish the import by a one-time import to a Name Rollup if the company information is limited to Company Name, Company City, Company State, and Company Phone. You will then map to these fields in the Name Mapping Screen. Any **new** companies created from the import will be placed on the Rollup when opened from a Companies view, and the names will be associated with the company. However, MST does recommend importing the company information first to a Company Rollup and then importing the name information to a Name Rollup as it allows you to create company records with more detail.

If your data file contains a list of names to import and some provide the company name while others do not, create two separate import files, or fill in empty company name cells with the name of your database’s default company.

- Map to #Company Name if you want the name linked to a company record based on Company Name only (being sure that there is only one company with this name). If a matching record is not found, a new Company record will be created with only the Company Name field populated with the value mapped to this field.
- Map to #Company Name, #Company City, and #Company State if you want the name linked to a Company record based on company name and the city/state. If a matching record is not found, a new Company record will be created with the Company Name, City and State fields populated with the value that was mapped to the corresponding field.
- Map to #Company Name and #Company Phone if you want the name linked to a company record based on company name and the phone number. If a matching record is not found, a new

Company record will be created with the Company Name and Phone fields populated with the value that was mapped to the corresponding field.

- Map to #Company Phone if you want the name linked to a Company record based on Phone only (being sure that there is only one company with this phone number). This option should be used with caution as it could result in the creation of a Company record with only the phone number populated if a match is not found.

Mapping to #Company City and #Company State should be used with caution as the name will be associated with a random company, since the link is based only on a match of city and state.

Identifying Imported Records

Activities

All records imported into the database will inherit an 'Import' activity, even those that were already in the database and skipped or updated based on a duplicate check. If the record was in the database, the Activity Text will also include the name of the fields modified.

Status Field

When importing names, you may map to the Status field of the Name record, however to do so you **must** use the single-letter code for the desired Status based on the list below:

- U = Unverified
- C = Candidate
- E = Employee
- M = Manager
- H = Hiring Authority
- I = Internal
- P = Placed
- T = Contractor/Temp
- X = Not Available
- A = On Assignment
- F = Reference

- D = Developed/Qualified
- O = Offer Accepted
- S = Submitted

Custom Fields

The importer will match any Custom Fields by the column name in the source data. To import data to a Custom Field, adjust the column name in the source data file so that it is an exact match to the custom field name in the database. For example, if you have a person's LinkedIn URL, name the column *Social_LinkedIn*, and then map that column to Custom Field 1.

If there is no custom field matching the given column name, the data will be imported to a new custom field matching that column name on any imported records.

Importing the Data

You can initiate the Generic Importer from the **Add Wizard** found under the lightning bolt icon at the top right corner of PCRecruiter, or via the action menu at the top of the **Rollup List** you wish to import the records into. The instructions below are for using the latter method, but the same principles apply when using the Add Wizard.

1. Click **Rollups** on the Main Menu and create/open a Rollup to which you will import the records. Be sure to open the list into the record type (Name, Company, Position) that you will be importing.
2. Click the **Import** option in the Action menu.
3. In the popup, select **Generic File Mapper/Importer**.
4. Click the **Select File** button at the top of the window. Locate the file you'll be importing and select it.
5. Checking the **Fill Empty City/State or Zipcode Fields** box tells the import utility to attempt to populate the missing data if your file contains City and State but Not Zip, or contains Zip but not City and State. These entries may be approximate.
6. If you have saved a mapping template from a previous import (see below), click the **Browse** button in the 'Mapping Template' area to select the mapping template file.
7. Click the **First Row Contains Headers** box if your file's first row contains header information. If this box is not checked, the first row will be handled as a record.

8. Select the appropriate radio button to indicate the type of file (i.e., **Comma Delimited, Tab Delimited, Pipe Delimited**).
9. Click **Next**. If you get an error message at this step, the cause is most likely that your import file has a blank space at the end of at least one column heading (e.g. "First Name "). Remove the space from the column heading then repeat the import process again.
10. The 'Field Mapping' screen is displayed. The upper area lists the PCRecruiter fields to which you can map data, and the lower displays the data from the file you selected to import. **Click in the middle column** on any row and a dropdown will appear. Use this dropdown to select the column from your data file that should be mapped to that PCRecruiter field.
    - If you are importing Name records, you *must* map First Name and Last Name. If your data file includes Full Name, map to the First Name field (leaving the Last Name blank) and PCRecruiter will split the name into First and Last for you.
    - If you are importing Name records and you wish to associate the records to Companies, map the individual's Company Name and Work Phone, Work City, or Work State to #Company Name, #Company Phone, #Company City, # Company State. PCRecruiter will use this mapping to determine the Company record to which the record will be linked. If a company name is not available or mapped, the names will be associated with the database's Default Company.
    - If you select the wrong field, click in the middle column then select the **Clear Field** option in the dropdown to remove the mapping specified for this field.
    - The Generic Mapper allows you to save the field mapping as a .pcr template file to expedite future imports of data in the same format. Click the **Save Template** link at the bottom of the Field Mapping screen to download this map. We suggest naming the file to indicate the originating source of the data file.
11. Once the desired field rows are mapped, click **Next.**
12. Select the duplicate check preference for the import. Any newly created records or existing records matching the duplicate check option will be placed on the Rollup.
    - **No Duplicate Check**: Load all data without checking.
    - **Skip if Duplicate Found**: If a duplicate is found, based on the Criteria selected, the original record is maintained without modification and a new record is not created.

- **Update if Duplicate Found**: If a duplicate is found, based on the Criteria selected, the original record is updated with the new data for any matched fields in the import.
- Criteria: Select from combinations of name, phone, and company, Last Name and Email, or a single field in your imported data.

13. Click **Import** to begin. You will be alerted when the import process is complete. Click the **X** in the upper right corner to exit. You can then refresh your Rollup to view the records.