

Impact File Import Instructions

Step One: Fill Out the Import Template

Utilize the Impact File Import template to place the required and optional information into the correct format.

Note: You can download a template directly from your account at any time by navigating to the Impact tab, clicking on the 'Import New Hires' sub-section, and then clicking on 'Click here for an example'.

Positions Candidates Analytics Attract Impact
Evaluations Import New Hires Imports Matching
Impact - Import New Hires
Mark a candidate as hired by using the Search or Import functions below! Use the search field to locate a candidate and update their hire information. Download an Import Template
Fields with * are required.

Download an Import Template from Within Your Account

Import Template Contains Sample Records

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A	В	с	D	E	F	G	
1 Please delete this row and the column header row below before uploading.							
2 Candidate Email	Employee First Name	Employee Last Name	Employee Email	Position Hired for	Hired Date	Started On	Employee I
3 staceysmiel+1313@gmail.com	Rick	Deon	staceysmiel+company@g	Jr Accountant	2/2/2016	2/2/2016	Martin
4 staceysmiel+01y7sdd6th6@gmail.com	Marcus	Price	staceysmiel+company2@	Booth Attendant	1/2/2016	1/2/2016	Martin
5							
6							
7							
8							
9							

The Import Template contains sample records which will be used as guidance for how to format the candidate information. Use the guidelines below to ensure that the Import Template is filled out correctly.

Import Template Guidelines to follow:

- Do not add or move any of the column headers
- Place the applicable information into the appropriate columns
- The following fields are required:
 - o Candidate Email
 - o Employee First Name
 - o Employee Last Name
 - Employee Email (i.e. company email address)
 - Position Hired For
 - Hired Date
 - o Started On
 - o Employee Manager First Name
 - Employee Manager Last Name
 - Employee Manager Email Address
- Ensure that Hired On Date is the same as or earlier than Started On Date
- Compensation is numerical only
 - Do not use any symbols (i.e. \$ or ,) in the Compensation Field
- Compensation Currency should match *exactly* one of the following terms:
 - US Dollar (i.e. do not use "US" or any other form of the term)
 - Australian Dollar
 - o Canadian Dollar
 - o British Pound
 - o Euro

Additional options exist. Please contact OutMatch for your exact currency terminology.

- Compensation Period should match *exactly* one of the following terms:
 - Annually (i.e. do not use "annual" or any other form of the term)
 - o Monthly
- Delete the first row (directions) and the second row (column headers) before saving the final CSV file

Step Two: Upload the CSV File

Within your account, click on the Impact tab then choose the 'Import New Hires' sub-section.

Click the 'Choose File' button and locate the CSV file of candidate information.

Click Upload.

Import the Formatted CSV File
Positions Candidates Analytics Attract Impact
Evaluations Import New Hires Imports Matching
Impact - Import New Hires
Mark a candidate as hired by using the Search or Import functions below! Use the search field to locate a candidate and update their hire information. Use the import function to upload a CSV file of hire information for multiple employees.
Import New Hires
Upload file * Choose File No file chosen 📀
File format must be Comma Separated Value (.csv)
Click here for an example Upload
Fields with * are required.

The file may take some time to be processed by the system. You will receive an email once the file has been processed letting you know to check back and see if user action is required.

An Email Notification will Alert You When Impact Import has finished processing the file	Inbox x
Support <support@chequed.com> to me ▼</support@chequed.com>	11:26 AM (1 minute ago) 🔆 🔺 🔻
Hello Stacey Smiel,	
ImpactImportFile_2016.6.5.csv has been processed! Ple see if user action is required. You may need to refresh the set of	ase navigate back to the Import page to ne Import page to see the status update.

Step Three: Confirm Whether User Action is Required

Within your account, click on the Impact tab then choose the 'Import New Hires' sub-section.

If you've kept this page open, you may need to refresh it after receiving your notification email to see that status change.

If the status is "User Action Required" then click on the pencil icon.

File Name	Date	Status	
ImpactImportFileTemplate_2016.6.5-TEST.csv	June 5, 2016	User Action Required	Ņ

If the File Status is 'User Action Required' then click on the Pencil Icon

The system will walk you through the major steps of taking action.

In the **first stage**, you will be presented with **approximate matches**. In most cases, these are candidates that the system has located but there is a discrepency in the name of the position that they're being hired for.

Match the position names to ansure that the candidate record is accurate

Jpload Details	Step 1: Approximate Match	Step 2: No Match	step 3: Review
sted below are ca elect the correct p ne. nce you address a	ndidates found in the import file v osition name from the list and the all records, please click forward to	whose position name do en click the Apply button o Step 2	es not match completely with the system records. Please apply the change to one candidate record
ter by:	oldul 🗸		
lame	Email Address	Your Position	Chequed Position Name
lame farcus Price	Email Address staceysmiel+01y7sdd6th6@gmi m	Your Position ail.co Booth Attendant	Chequed Position Name Match to Existing Chequed Job Match to Existing Chequed Job Booth Cashiers - Deriver

Use the drop down to choose the Chequed Position Name that matches the position name used in your import file.

To save this matching for future use, click the box next to 'Save and Use this Posiiton Matching'.

Click the Apply button.

Name	Email Address	Your Position	Chequed Position Name
Rick Deon	stacevsmiel+1313@gmail.com	Jr Accountant	Junior Accountant - Denver
Nick Doon	staceystines is roteginaliteoni	of Accountant	Save and Use this Position Matching 📀

Once you work through all of the Approximate Matches, move to the second stage: No Matches.

Here you will find a list of the candidate records that have no matches in the Chequed system.

The system matches based upon candidate email address, candidate first and last name, and position.

What to do if there are candidate records with no match:

- It is possible that these are candidates that do not have information in the Chequed system, in which case you can ignore these records.
- It is also possible that the candidate email and candidate first/last name are different in your file than they are in the Chequed system. You can make note of these affected candidates and double-check the information you put in the Import file for them, make any applicable edits, then re-try the upload at a later time.
 - Click 'Export to CSV' to export a file of these affected candidates.

Candidate records with no match may need to be edited and then uploaded again later.

Impact - Impo	ort New Hires		
Upload Details	Step 1: Approximate Matches	Step 2: No Matches	Step 3: Review
Listed below are individ candidates used a diffe be performed against t candidates again.	duals that were included in the import and erent email address during the application hese individuals currently, please correct	could not be located in o process than the one in the information included	our database. It is possible that these cluded in the import. No further action can in the import file and try to import these
Filter by:	Clear 📀		
Name	Email Address	Your Po	osition
Dana Markus	staceysmiel+nomatch@gmail.com	Manage	r

The final stage is Review.

This is a list that can be used to confirm which candidate records were successfully marked as hired within the Chequed System.

You can click 'Export to CSV' to export a file of these successfully updated candidate records for confirmation and for future reference.

Details	Step 1: Approximate Matches	Step 2: No Matches	Step 3: Review
his page contains a si	ummary of individuals that the system was	s able to match success	ully. These candidates have been ma
	action is required and you can by out at	any une.	
Iter by:	Clear 💡		
lama	Email Address	Veux B	aitian
Name	Email Address	Your Pe	sition
Name Marcus Price	Email Address staceysmiel+01y7sdd6th6@gmail.com	Your Po Booth C	ashiers

That's It!

No further action is required on your part. You can log out at any time.

The system will launch out the surveys at the appropriate time.