

How to provide Springest with your employee data

For Springest to be able to handle your employee data correctly and keep it up-to-date, we require a CSV file that adheres to a certain structure as described below.

The CSV file should start with a header row with fixed column names that do not change between different versions of the file. We check that all required columns are present before importing the file, so incomplete or files with a changed column structure cannot be imported. The columns have to match exactly as configured in our system, so extra columns (even when not used) will make the import fail.

Each employee should have its own row in the file. We can set the email address of the employee or the employee number to identify employees and update their data accordingly. It is important that the identifier does not change, because else the employee might lose his or her data and reporting can be off.

The file has to be encoded with UTF-8 character encoding. In case of other encodings, problems with special characters will almost certainly arise.

The following columns can be supplied, fields marked with an asterisk and bolded are required.

<i>column name</i>	<i>valid/preferred format</i>	<i>comments</i>
gender*	m for male, f for female	
first_name*	text	
last_name*	text	
email_address*	text	
phone_number	text	
birth_date	YYYY-MM-DD	<i>Please use leading zeros</i>
birth_place	text	
address	text	
house_number	text	
postal_code	text	
city	text	

country	text	
job_title	text	
employee_nr	text	
company_name	text	
department	text	
cost_center	text	
initials	text	

Learning Budgets

We support the importing of up to 3 different budgets. Each budget can have a name (which is visible to the employee), an amount and an expiry date.

Note: since November 2018 we will only set the amount of the budget the first time it's imported. This means you cannot update the amount of existing budgets via later imports. Updating the expiry date is still possible. Existing budgets are matched on expiry date or name.

learning_budget_name	text	
learning_budget	number with 2 decimals	<i>No thousand separators and "." as a decimal separator</i>
learning_budget_expiry_date	YYYY-MM-DD	<i>Same format as birth_date</i>
learning_budget_name_2	text	
learning_budget_2	number with 2 decimals	<i>No thousand separators and "." as a decimal separator</i>
learning_budget_expiry_date_2	YYYY-MM-DD	<i>Same format as birth_date</i>
learning_budget_name_3	text	
learning_budget_3	number with 2 decimals	<i>No thousand separators and "." as a decimal separator</i>
learning_budget_expiry_date_3	YYYY-MM-DD	<i>Same format as birth_date</i>

Matching managers to employees for the approval flow

It is possible to match the employees' managers to their accounts. This is a required step in order to get the approval flow working. We match managers by email address or employee number. **Please note that the manager also has to exist as a 'regular' employee in the CSV file.** It is possible to match up to four managers by adhering to the following column structure:

column name	valid format	comments
approver_1	text	<i>email address or employee nr</i>
approver_2	text	<i>email address or employee nr</i>
approver_3	text	<i>email address or employee nr</i>
approver_4	text	<i>email address or employee nr</i>

Please be aware: the managers email address should exactly match the email address provided for that manager as employee.

Example: Jane Doe is provided in the CSV as jane.doe@springest.com. If she is someone's manager she needs to be added as an approver with jane.doe@springest.com not Jane.Doe@springest.com or Jane.doe@springest.com. *This is case sensitive.*