

Flare HR Import Manual

WorkDESK

Flare HR Import Manual

YOU REQUIRE SOFTWARE VERSION 12.5021+ or HIGHER TO
ACTIVATE AND IMPORT FLARE HR CANDIDATES

CHECK THE WORKDESK WEBSITE FOR THE LATEST SOFTWARE
UPDATES BEFORE CARRYING OUT AN EXPORT

**IF YOU DO NOT HAVE A CURRENT SOFTWARE SUBSCRIPTION YOU
WILL NOT BE GRANTED ACCESS TO CRITICAL UPDATES.**

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Introduction

INTRODUCTION

WorkDESK provides an option to integrate with Flare HR to import Candidate's onboarding information into WorkDESK.

This document provides an overview of how to enable Flare HR integration in WorkDESK and the different options when importing Candidate onboarding information from Flare HR.

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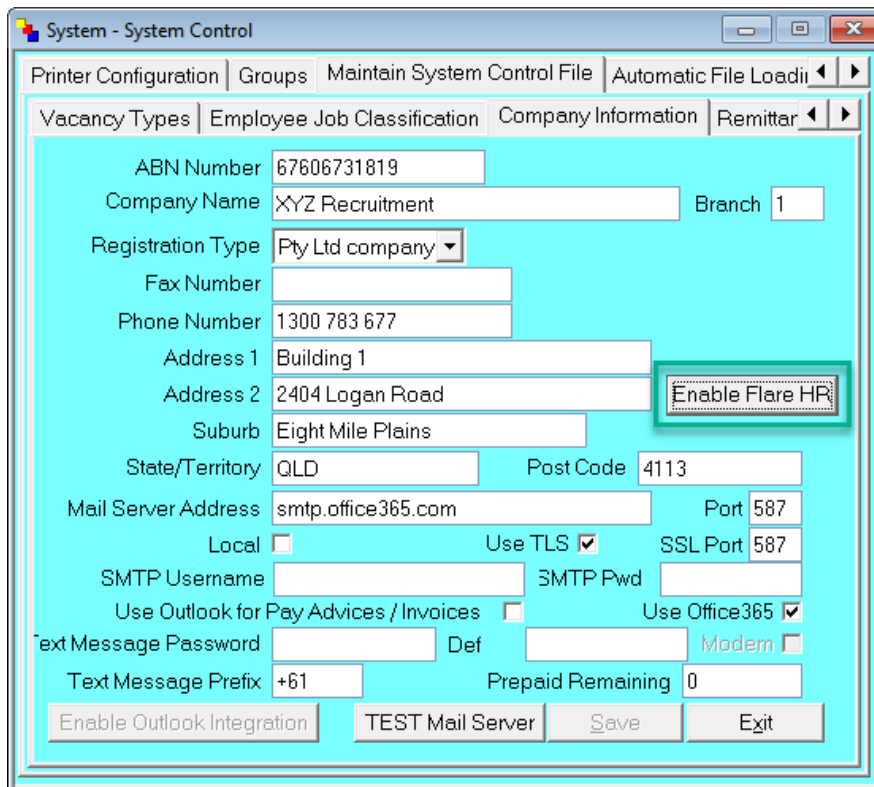
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Activating Flare HR Import option in your database

A backup should be made, and all users should be logged out before activating.

Activation is done through System -> System Control -> Maintain System Control File -> Company Information: Enable Flare HR.

If you don't have access to this screen you will need to login with a higher security level username.



The screenshot shows a software window titled "System - System Control" with several tabs: "Printer Configuration", "Groups", "Maintain System Control File", and "Automatic File Loadin". The "Maintain System Control File" tab is active, and within it, the "Company Information" sub-tab is selected. The form contains various fields for company details, including ABN Number (67606731819), Company Name (XYZ Recruitment), Branch (1), Registration Type (Pty Ltd company), Phone Number (1300 783 677), Address 1 (Building 1), Address 2 (2404 Logan Road), Suburb (Eight Mile Plains), State/Territory (QLD), and Post Code (4113). There are also fields for Mail Server Address (smtp.office365.com), Port (587), Local (unchecked), Use TLS (checked), and SSL Port (587). At the bottom, there are buttons for "Enable Outlook Integration", "TEST Mail Server", "Save", and "Exit". A red rectangular box highlights the "Enable Flare HR" button, which is currently disabled (greyed out).

When clicking the Enable Flare HR button, you are asked to confirm that you want to enable Flare HR integration. After enabling the Flare HR integration, the Enable Flare HR button is greyed out.

Activation is 'per database' if you have any other companies or groups on your login screen you wish to use Flare HR import then you must repeat this activation process in each.

By default, the security level to access Import from Flare HR is set to level 6. This can be changed under System -> Security -> Security Levels -> System -> System Control: Import from Flare HR.

Getting the Import file from Flare HR

Using a Flare HR supported browser, navigate to the Flare HR web site, and log in to your account.

Flare HR supports the following web browsers:

- The last two versions of Google Chrome for PC and MAC
- The last two versions of Apple Safari
- The last two versions of Microsoft Edge

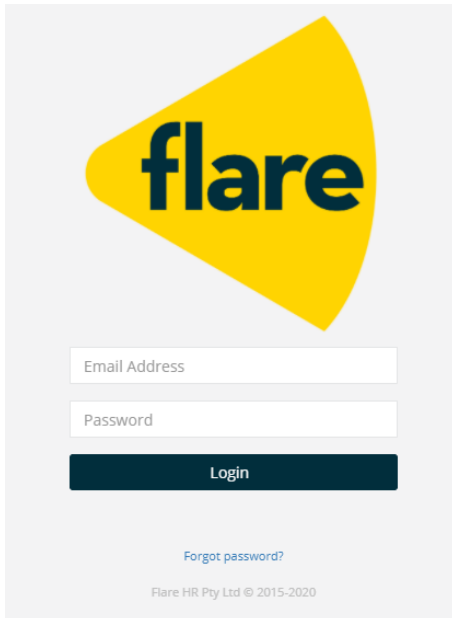
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Flare Login

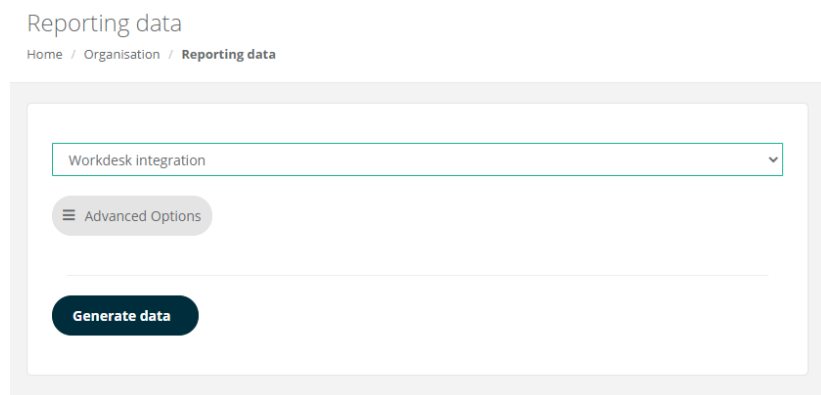
Flare HR will set up logins for you on their website to create onboarding reports and to download Candidate onboarding information to import into WorkDESK.

Enter your email address and password.



The image shows the Flare HR login interface. At the top is the Flare logo, which consists of a yellow triangle pointing right with the word 'flare' in blue lowercase letters. Below the logo are two input fields: 'Email Address' and 'Password'. Underneath these fields is a dark blue button labeled 'Login'. At the bottom of the form, there is a link for 'Forgot password?' and a copyright notice: 'Flare HR Pty Ltd © 2015-2020'.

Navigate the left-hand menu and go to Organisation -> Reporting Data



The image is a screenshot of the 'Reporting data' page in the WorkDESK interface. The page title is 'Reporting data' and the breadcrumb trail is 'Home / Organisation / Reporting data'. The main content area contains a dropdown menu currently set to 'Workdesk integration'. Below the dropdown is a button labeled 'Advanced Options'. At the bottom of the content area is a dark blue button labeled 'Generate data'.

Select your database from the drop-down list.

Under Advanced Options, select Incremental data – on-boarded since last time. This will give you all the Candidates that were on-boarded since the last download.

Click the Generate data button.

When the import file is ready to be downloaded, you will receive an email notification from Flare HR that your file is ready to be downloaded.

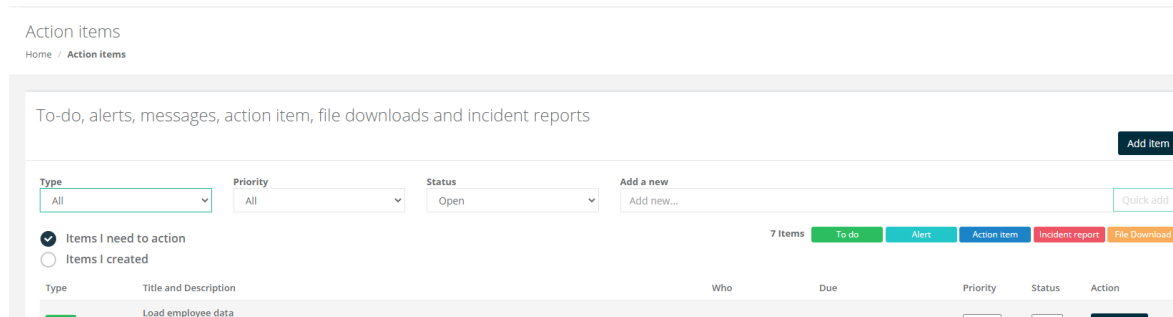
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Downloading the import file

Log in to Flare HR and navigate to Home -> Action Items.

On this screen you can click on the yellow button on the right side of the screen to filter all the files that are available for download.



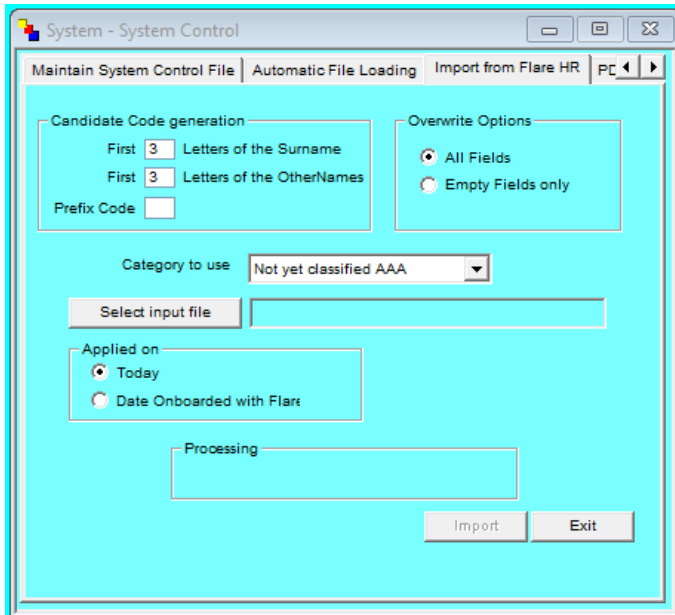
Locate the import file sent to you in the email from Flare HR, click on the download button to the right of the file (as advised in the email from Flare HR) and save the file to a local folder on your computer.

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Importing Files into WorkDESK

After you saved your import file from Flare HR, go into System -> System Control -> Import from Flare HR



On this screen, you can select how WorkDESK imports and merges your data from Flare HR into WorkDESK.

Candidate Code generation

When new Candidates are added, these options determine how the code is created. In the above screen, WorkDESK will take the first 3 letters from the surname and the first three letters of the first name. Optionally, you can have a single character Prefix Code that is added at the beginning of the code. The total length of the code must be 7 characters or less.

Candidate codes can be altered after the import in System -> Alter Codes -> Candidate

Overwrite Options

When a Candidate is found that has a matching last name and email address, this Candidate's details are updated, not added as new. Selecting *All Fields* will overwrite existing fields even if they contain data. Selecting *Empty fields Only* will only copy information if the existing field is blank.

Note: All fields will not override an existing Candidate Code, Category or Applied on Date.

Category to use

This is the Category that is used for new Candidates.

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Select Input File

This button will display a dialog to select the downloaded CSV file from your local folder.

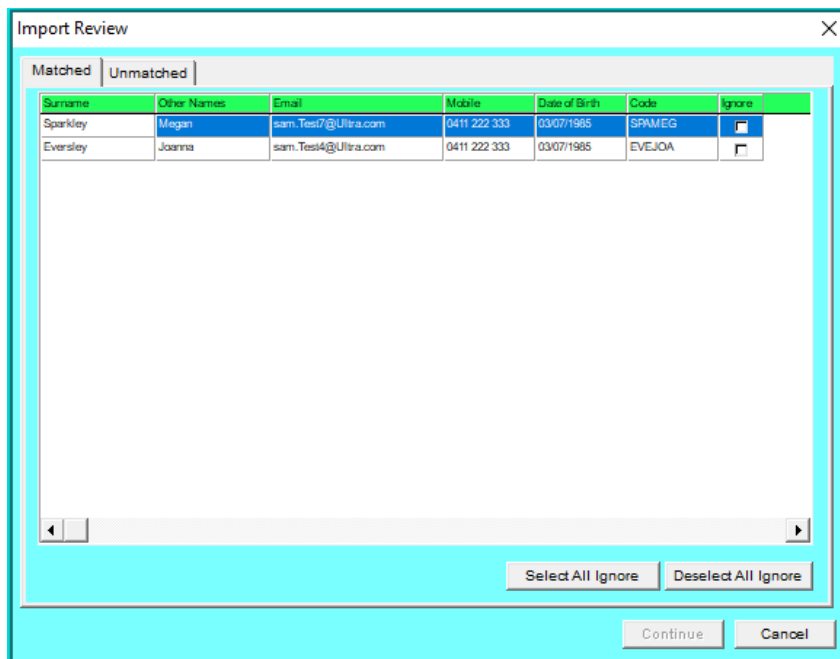
Applied On

When adding new Candidates, the Applied On date can be either today's date or the on-boarding date from Flare HR.

Import Review

After clicking the Import button, You will be prompted to back up your data before proceeding. WorkDESK will then process the CSV file and display a review screen.

Matched Candidates



The first tab displays all the Candidates that were matched based on their surname and email address. You can exclude Candidates from being imported by clicking the Ignore checkbox. You can also select or deselect all Candidates via the buttons at the bottom of the screen.

Leaving this screen as is (with ignore not selected) will update these candidates based on your previous selection 'Overwrite all fields' or 'Overwrite blank only'

If you have Unmatched Candidates, you must go to the 'Unmatched' tab at the top to continue.

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Unmatched Candidates

The second tab displays Candidates that could not be matched based on their surname and email address. This also include entries where multiple Candidates with the same surname and email address were found.

Surname	Other Names	Email	Mobile	Date of Birth	New	Ignore	Code
Marley	Bob	sam.Test0@Ultra.com	0411 222 333	15/01/1992	<input type="checkbox"/>	<input type="checkbox"/>	
Queensland	Bronie	sam.Test5@Ultra.com	0411 222 333	05/07/1986	<input type="checkbox"/>	<input type="checkbox"/>	
King	Rob	sam.Test2@Ultra.com	0411 222 333	22/07/1988	<input type="checkbox"/>	<input type="checkbox"/>	
Middleton	Cate	sam.Test6@Ultra.com	0411 222 333	03/07/1985	<input type="checkbox"/>	<input type="checkbox"/>	
Doe	Jane	Jane.doe12@gmail.cc	0411111111	01/01/1900	<input type="checkbox"/>	<input type="checkbox"/>	
Jones	George	sam.Test1@Ultra.com	0411 222 333	03/07/2005	<input type="checkbox"/>	<input type="checkbox"/>	

Surname	Other Names	Email	Mobile	Date of Birth	Code	Select
JONES	Jenny Anne			30/08/59	JONEJA	▶
JONES	Jenny Barbara			20/08/64	JONEJB	▶

How each line is processed can be selected via the New and Ignore check boxes and the Code column.

Ticking the New check box, marks the line to be added as a new Candidate.

Ticking the Ignore check box will exclude that line from being imported.

Existing Candidates can be selected by either clicking on one of the arrows in the bottom grid if a partial match is detected, or by entering a Candidate code in the Code column in the top grid.

Alternatively, you can use the buttons below the top grid to tick and untick all New and Ignore check boxes in the top grid. This will update existing Candidate details with information from Flare HR. How the information is updated depends on the *Overwrite Options* on the main import screen.

After a selection is made for each line in the top grid, the continue button is enabled.

Clicking continue will prompt to commence import from Flare HR and update your WorkDESK database.

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Import Report

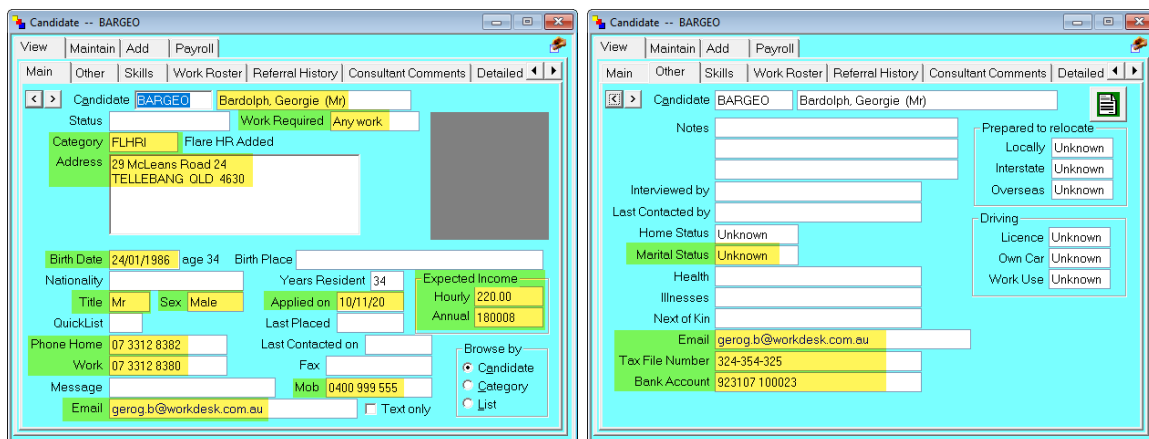
After the Flare HR import, WorkDESK displays a report detailing what Candidates were added, updated, or ignored.

	A	B	C	D	E	F	G	H
1	Surname	Other Names	Email	Mobile	Date of Birth	Code	Success/Error	Comment
2	Sparkley	Megan	sam.Test7@Ultra.co	0411 222 333	3/07/1985	1SPAMEG	Success	Candidate added
3	King	Rob	sam.Test2@Ultra.co	0411 222 333	22/07/1988	1KINROB	Success	Candidate added
4	Marley	Bob	sam.Test3@Ultra.co	0411 222 333	15/01/1992	1MARBOB	Success	Candidate added
5	Eversley	Joanna	sam.Test4@Ultra.co	0411 222 333	3/07/1985	1EVEJOA	Success	Candidate added
6	Queensla	Bronte	sam.Test5@Ultra.co	0411 222 333	5/07/1986	1QUEBRO	Success	Candidate added
7	Jones	George	sam.Test1@Ultra.co	0411 222 333	3/07/2005	1JONGEO	Success	Candidate added
8	Middlelor	Cate	sam.Test6@Ultra.co	0411 222 333	3/07/1985	1MIDCAT	Success	Candidate added
9	Doe	Jane	Jane.doe12@gmail.co	0411111111	1/01/1900	1DOEJAN	Success	Candidate added

This report is also accessible via View -> Admin Manager by clicking on the Audit button for Flare HR import items.

Fields updated during Flare HR import

The following screens and fields are updated with information from Flare HR. The Category and Applied on date fields are only imported when adding new Candidates.



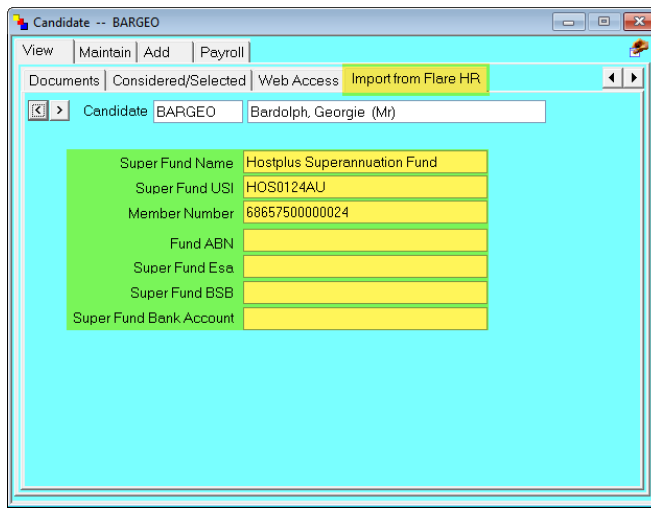
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Additional information on Candidate View screen

Superfund details that were imported from Flare HR are displayed under
Candidate -> View -> Import from Flare HR

This information includes super fund details captured during the onboarding process.



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Error messages during Flare HR import

Since the import process can change live candidate & employee data, you will not be able to process an invoice run or payrun while an import is in progress. Also, if you have started an invoice/ payrun then you cannot start a Flare HR import on another terminal until the import is finished.

If this occurs a relevant error message will appear preventing the payrun, invoice run or import.

You should also not open the import CSV file in Excel, doing so can change the formatting and cause mobile numbers, bank accounts, etc to remote leading zeros.

I40333 Entries in the import file had errors and will be skipped. Continue?	WorkDESK has found entries with either a blank Surname or First Names, or an import line with missing fields. These entries will not be imported. You can either continue or cancel the import.
E47006 Error rewriting Import file.	WorkDESK encountered an error while rewriting the import file. Check that you have write permissions to your local folder. Import is cancelled.
E47007 Error processing Import file.	Unable to process the import file. The file may be damaged. Import is cancelled.
E47009 Error inserting superannuation information.	An error was encountered while inserting the superannuation details. More information is included in the report.
M47967 Candidate superannuation data is in use.	The Flare HR superannuation record is being used by another user.
E47011 Error inserting superannuation information.	WorkDESK encountered an error while inserting the Flare HR superannuation information. More details are included in the report.
E47012 Error rewriting superannuation information.	WorkDESK encountered an error while rewriting the Flare HR superannuation information. More details are included in the report.
E44333 Error copying Flare HR import audit trail.	When running under Client-Server, WorkDESK was unable to transfer the error file to the FlareHRImport folder on the Server.
E44333 Error copying Flare HR import audit trail.	When running under Client-Server, WorkDESK was unable to transfer the audit file to the FlareHRImport folder on the Server.
E44332 Error copying Flare HR import audit trail.	When running under Client-Server, WorkDESK was unable to transfer the audit report file to the FlareHRImport folder on the Server.
E44331 Error copying FlareHR import audit trail	When running under Client-Server, WorkDESK was unable to transfer the audit report file to the tempsys/audit folder on the Server.